STOCKLEY PARK

TRAVEL SURVEY RESULTS

TECHNICAL NOTE

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STOCKLEY PARK

1 INTRODUCTION AND HEADLINES

1.1 INTRODUCTION

1.1.1 This technical note summarises the outcome of an annual travel survey of staff travel patterns within businesses across Stockley Park undertaken in early 2022, the previous survey of which was undertaken in November / December 2018.

1.1.2 The 10-minute Travel Survey was designed to help understand how employees in Stockley Park travel to work and what factors affect their travel choices. Fundamentally, the questions also aimed to identify how working arrangements and travel patterns have changed since pandemic.

1.1.3 The survey was conducted electronically using an online survey tool and was completed by 650 respondents. Of the businesses that took part, the maximum employee base combined is estimated at around 1,813 (based on respective business staff numbers), giving an overall response rate of 36% across the estate which is a strong response rate.

1.1.4 Pre-prepared mailshots were issued to each of the key business contacts to ensure promotion of the survey to all staff prior to and during the survey period.

1.2 HEADLINE FINDINGS AND ACTIONS

1.2.1 Based on the significant response rate there is a large amount of data presented in this report and associated outcomes/actions. For ease of refence the headline results which will be considered and actioned over the coming months are as follows:

Travel Behaviour Change

- Overall, the Pandemic appears to have had little impact on the respondent's main mode of transport to work, with a 1.9% reduction in single occupancy vehicle travel and cycling since the pandemic, and a 1.5% increase in use of public transport, 0.2% increase in walking, and 0.2% increase in motorcycle/scooter travel.
- While difficult to draw conclusions, 70% of staff work in a business where a return to office policy has been implemented.
- A large proportion of respondents worked from home very little or never worked from home at all pre-pandemic, with 61% working in the estate 5 days per week. Significantly, Post pandemic, 63% of respondents currently or expect to work from home 2-3 days a week. This is the most telling finding of the survey, where, pre-pandemic, just 16% of respondents work in the estate 2-3 days a week.

  Action: This highlights a potentially significant reduction in travel demand to/from the estate in a given week and the results will be assessed by Velocity against 1) data related to respondents that travel by car only, 2) historic traffic survey results including those conducted in August/September, and 3) staff open ended feedback on changes to arrival/departures times, with a view to quantifying the change in traffic flow by time of day and across a typical week and the associated emissions reductions pre to post pandemic.

Workplace Accessible Parking and Charging

- Approximately 9% of all vehicles travelling to/from Stockley Park are electric or hybrid, with 45 respondents citing the need for more charging points. Similarly there was a large number of survey respondents citing lack of EV charging (either en route or at Stockley Park) as a constraint to 1) working days in the estate or 2) switching to EV.

  Action: Subsequently a review should be conducted on the availability and distribution of workplace charging facilities to accommodate what will likely be an increase in demand, but mindful of the reduction in average commuting days to the estate.

- 9% of staff advised they have a mobility impairment which affect how they can travel to work;

  Action: A further review to be conducted by respondent business and 1) measures on existing public transport routes to facilitate mobility impairments, and 2) the level of accessible parking bays by business to ensure there is sufficient provision for those that hold a blue badge.

Public Transport

- 5% switch in travel to/from the estate from Hayes and Harlington Station to West Drayton Station, potentially the result of recent completed station upgrades.

- Most notably, there is expected to be an increased reliance on the Stockley Shuttle at the expense of the U5 public service (a 10% switch) and which may be directly related to nervousness over volume of passengers using the latter.

  Action: Velocity to engage with easit to assess the change in demand based on further analysis of Work From Office days to inform any potential change/increase in service frequency.

- There has been a 5% increase since 2018 in the percentage of staff across the estate aware of easitSTOCKLEY PARK travel initiatives.

  Action: Velocity will engage with easit to enable further outreach to staff that advised they are unaware of the benefits available, many of whom may be new staff.

Staff Travel Workshop

- 59 respondents expressed their interest in attending a travel workshop to expand on the issues and opportunities related to staff returning to the office.

  Action: A workshop will subsequently be arranged to co-ordinate this feedback which will be invaluable.

- A considerable level of respondents provided feedback on travel matters generally within the estate, with over 256 open ended responses.

  Action: These will be grouped into themes, presented and discussed at the travel workshop to facilitate discussion, and obtain the views of tenants on matters considered most beneficial to address and likelihood of success.

2 SURVEY RESULTS

2.1 SURVEY RESULTS

RESPONDENTS PROFILE

2.1.1 The travel survey received a total of 650 responses, from 19 of the 26 businesses based at Stockley Park. **Table 2-1** shows the composition of respondents by organisation.

Table 2-1: Number of respondents per business

Organisation	Responses/Tate	
IMG Productions	28.15%	183
Gilead	23.54%	153
Hasbro	16.46%	107
MSC Cruises Management Ltd	8.62%	56
Hikvision	7.54%	49
Sharp	5.08%	33
Mitsubishi	3.23%	21
Other (please specify)	2.15%	14
Orega	1.08%	7
Toshiba of Europe Ltd	0.92%	6
Stockley Park Management	0.62%	4
Alexion Pharma	0.46%	3
Lucozade Ribena Suntory	0.46%	3
Nobel Biocare	0.46%	3
Canon	0.31%	2
Toshiba International	0.31%	2
Cargo Logic Management	0.15%	1
Coats	0.15%	1
Keuhne+Nagel	0.15%	1
Samsonite	0.15%	1
Apple	0%	0
HAVI Global Solutions	0%	0
Marks & Spencer	0%	0
Regus	0%	0
Verifone	0%	0
World Vision	0%	0
Total	**100%**	**650**

2.1.2 Respondents were asked to provide their home postcode to analyse the distance travelled to/from the estates. All respondents declared their postcode for analysis, of which 61% declared their full postcode. Where only the first half (postcode area and district only) was declared (38% of responses) this was still plotted using the central point for that district (e.g. KT11). **Table 2-2** presents the analysed data.

Table 2-2: Distance between home and Stockley Park

Distance Between Home and Stockley Park	Staff	
	Number	Percentage
< 1km	1	0.2%
1 - 2km	29	4.5%
2 - 5km	61	9.4%
5 - 10km	78	12.1%
10 - 20km	194	30.0%
> 20km	283	43.8%
Total	**646**	**100%**

2.1.3 **Table 2-2** shows that over 14% of staff live within 5km of the park, ie which offers the greatest propensity for staff to travel to work by active modes of transport.

2.1.4 **Figure 2-1** combines the postcode locations of employees with their main mode of travel to Stockley Park since the pandemic.

2.1.5 Those who travelled by train are generally clustered around main railway lines, particularly those who live in Ealing / Brentford areas in West London. Train users become sparse outside of the main line that runs through Hays and Harlington and West Drayton Stations. This is likely due to the need to make one or more changes during the commute.

2.1.6 Those who use bus are more distributed around the map; however, are generally limited to a shorter commuting distance compared to those who drive to work. It is noteworthy that many of those who commute from Uxbridge also continue to commute by car despite the availability of public transport.

2.1.7 Clusters of home postcodes highlight opportunities to promote car sharing.

Figure 2-1 Postcode Locations Combined with Mode of Transport Used Before the Pandemic

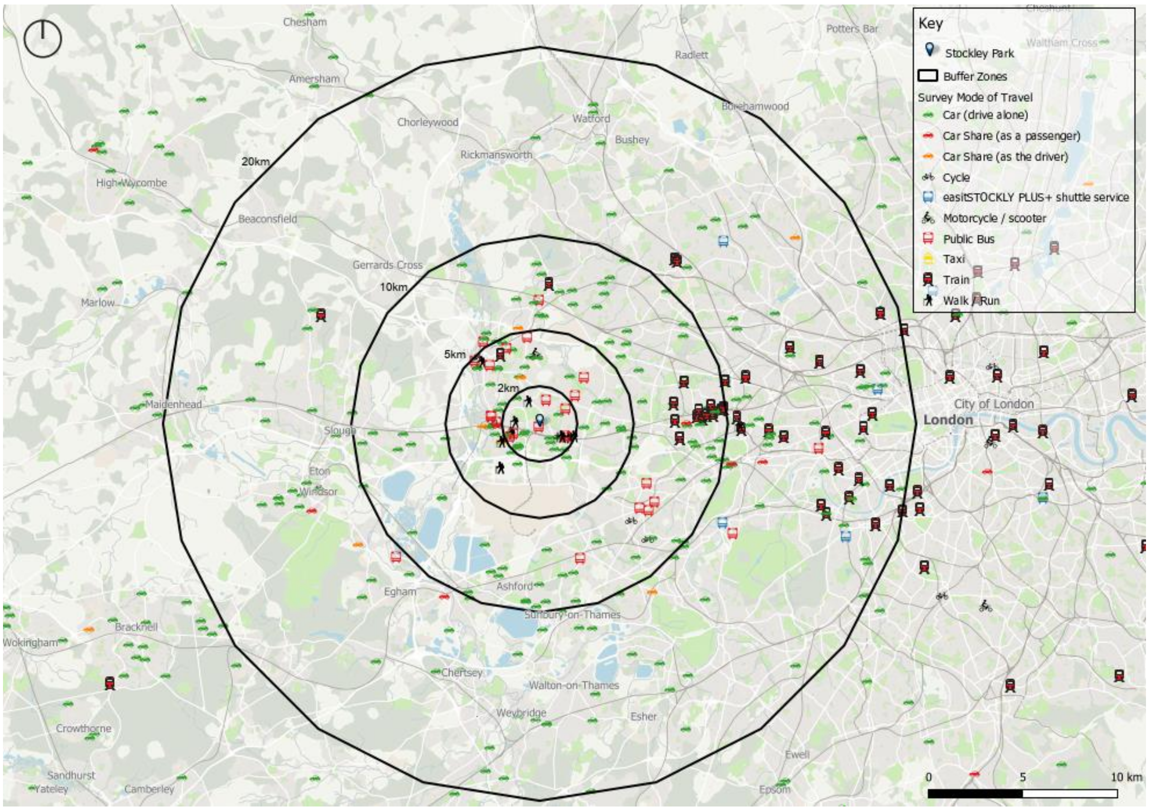
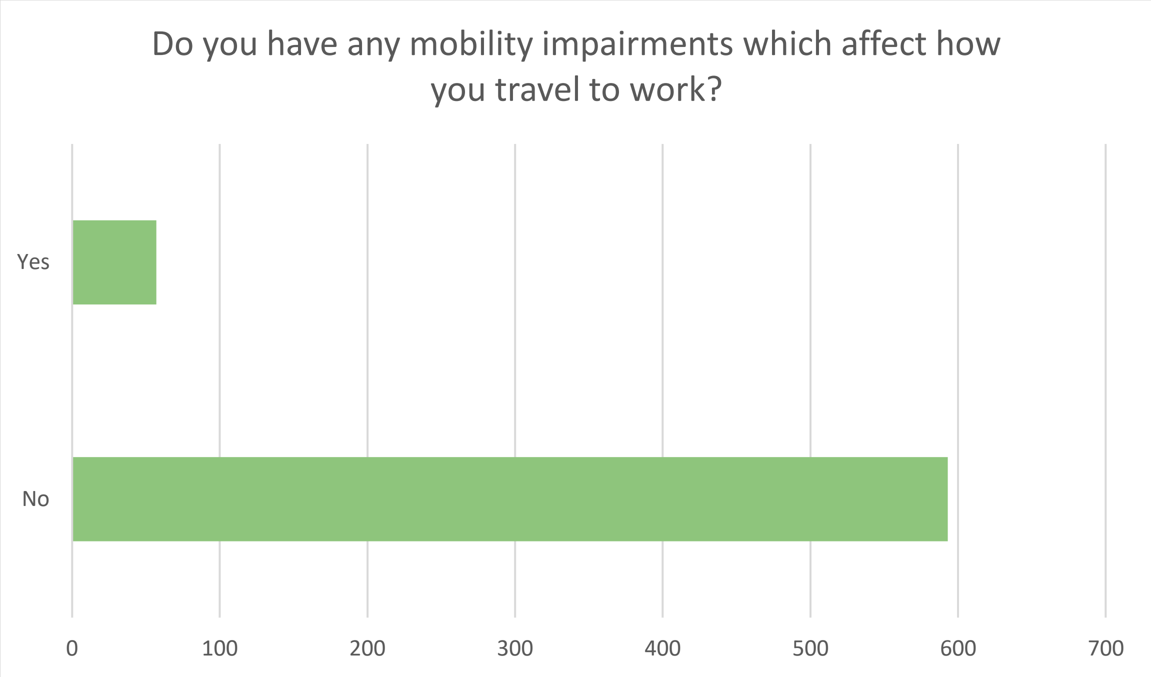


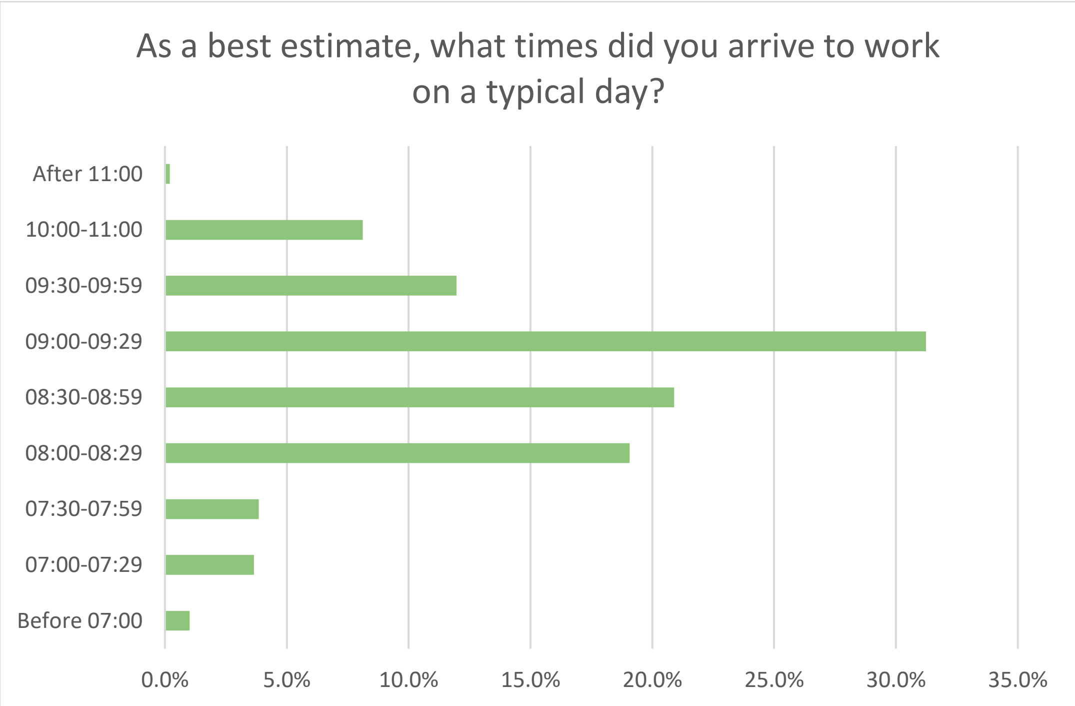
Figure 2-2 Number of People with Mobility Impairments who Travel to Stockley Park



2.1.8 **Figure 2-2** shows that 57 (9%) of respondents have mobility impairments which affect how they can travel to work. Of this number, 27 stated they drove in a private car or used a car share as their main mode of transport to Stockley Park before the pandemic. 8 of respondents with mobility impairments used public transport as their main mode of travel.

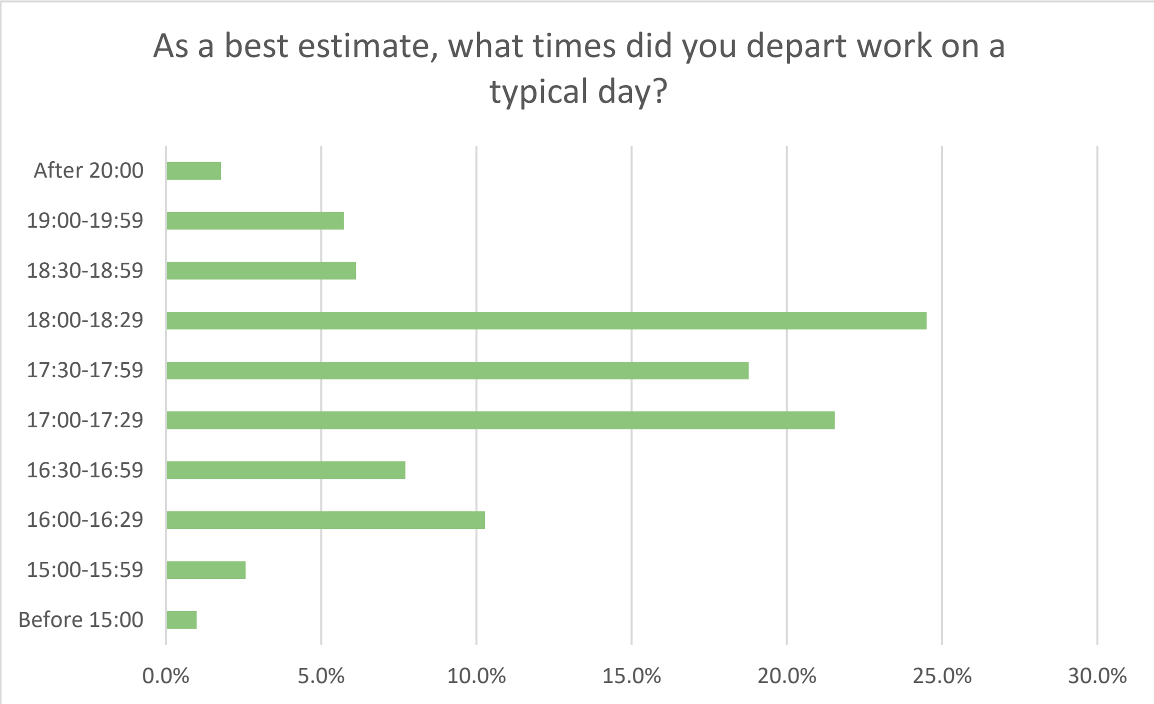
PRE-PANDEMIC TRAVEL PROFILE

Figure 2-3: Respondent arrival times



2.1.9 **Figure 2-3** shows peak arrival times between 09:00 and 09:30, at over 31%. This is a slight shift from the responses in the 2018 survey where the majority of arrivals were between 08:30 and 08:59.

Figure 2-4: Respondent departure times

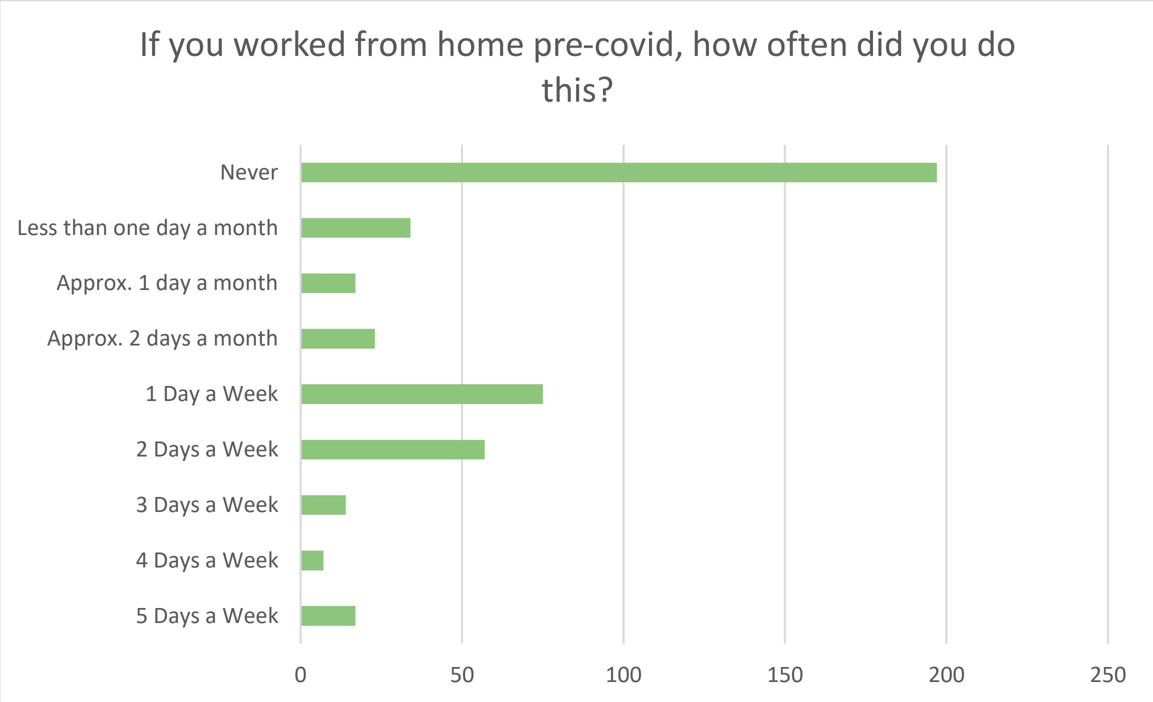


2.1.10 **Figure 2-4** depicts similar leaving times as the 2018 travel survey. There was a pronounced peak between 17:00 and 18:29 (65%), with the majority leaving between 18:00 and 18:29. Variation in arrival and departure times highlight that some staff had a degree of flexibility in their work hours before the pandemic, since the 2018 survey.

2.2 TRAVEL PATTERNS

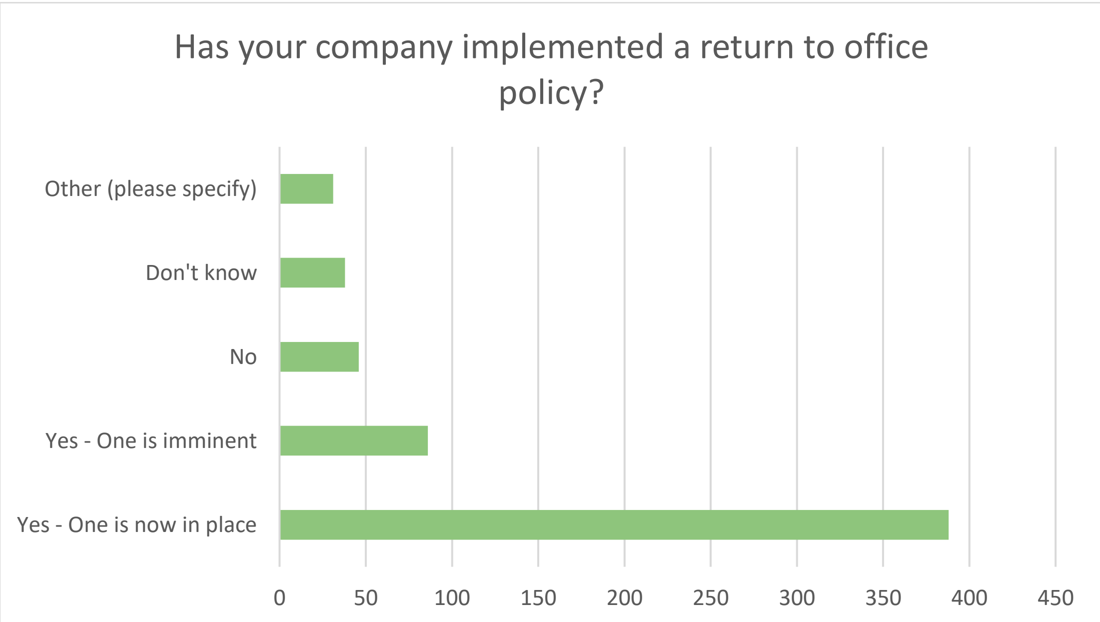
2.2.1 As would be expected, the majority of respondents have come to expect more flexible working arrangements since the advent of the pandemic. The following figures review the change in work from home arrangements. **Figure 2-5** shows that a large proportion of respondents worked from home very little or never worked from home at all pre-covid, with 61% working in the estate 5 days per week.

Figure 2-5 Frequency of Working from Home Pre-Covid



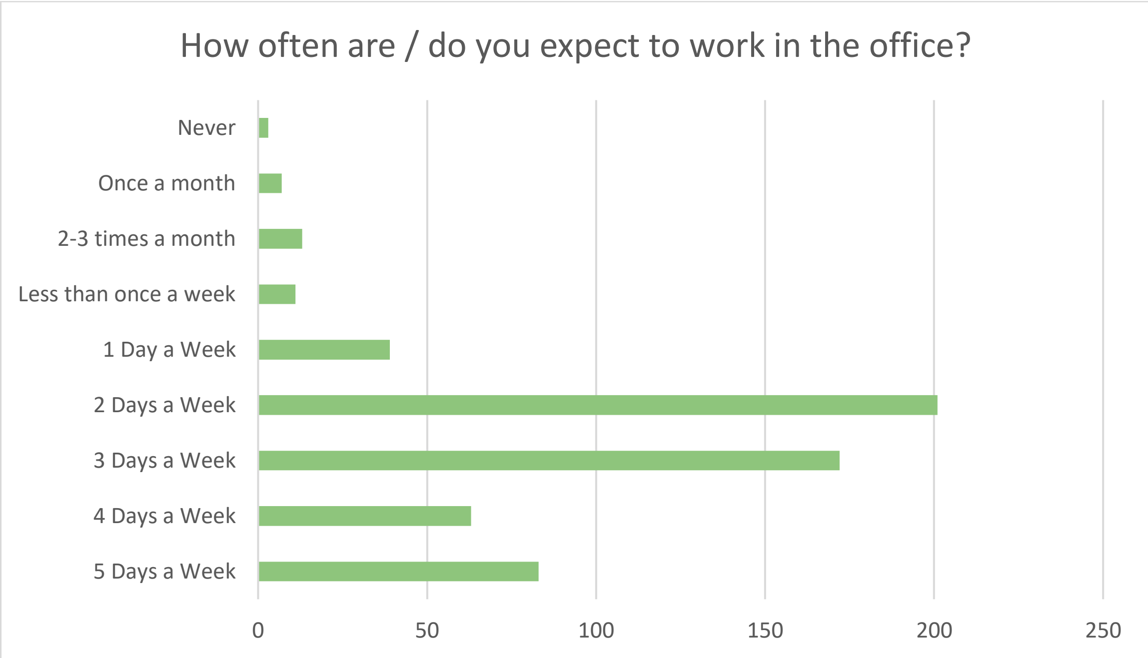
2.2.2 Respondents were then asked whether a return to office policy has been implemented, where interestingly the majority (70%) of respondents advised that they have.

Figure 2-6 Return to Office Policy



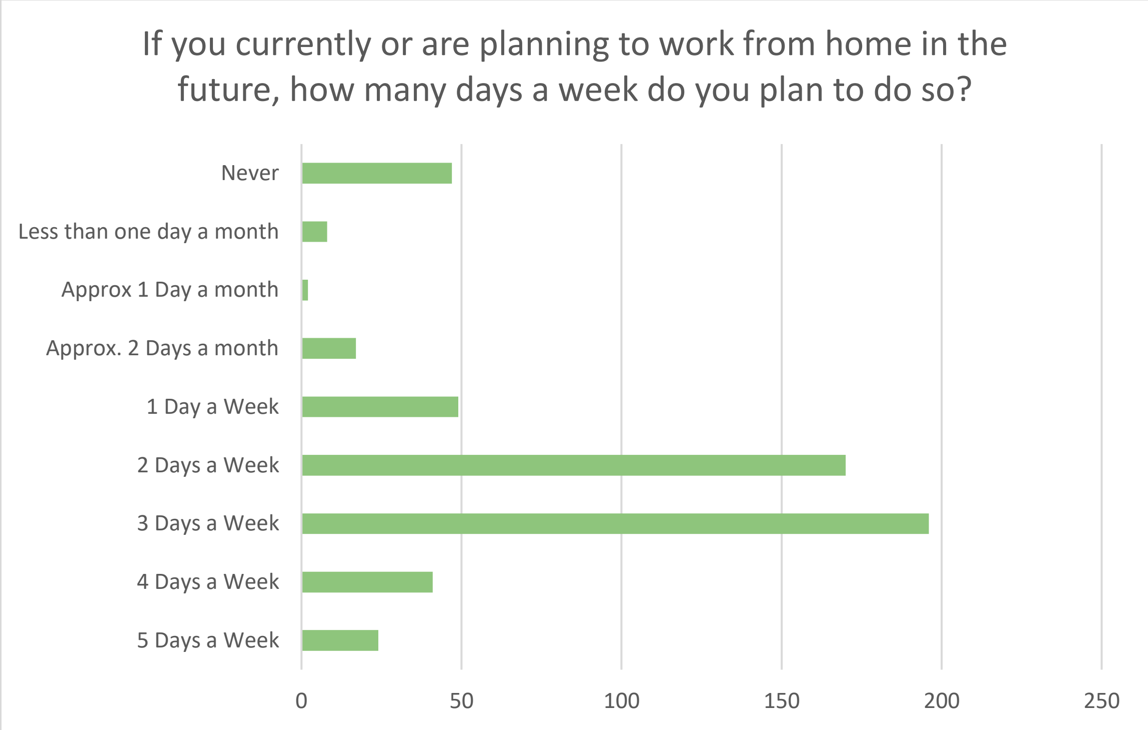
2.2.3 Post pandemic, only 83 respondents stated they were expecting to be in the office for a full working week, with most respondents (63%) expecting to work from home 2-3 days a week **(Figure 2-7**). This being the most telling finding of the survey, where, pre-pandemic, just 16% of respondents work in the estate 2-3 days a week. This highlights a potentially significant reduction in travel demand to/from the estate in a given week.

Figure 2-7 How Often are / do you Expect to Work in the Office?



2.2.4 The advent of flexible working arrangements is also reflected in **Figure 2-8.** Most respondents were currently or planning to work from home 2-3 days a week, which is consistent with the above results.

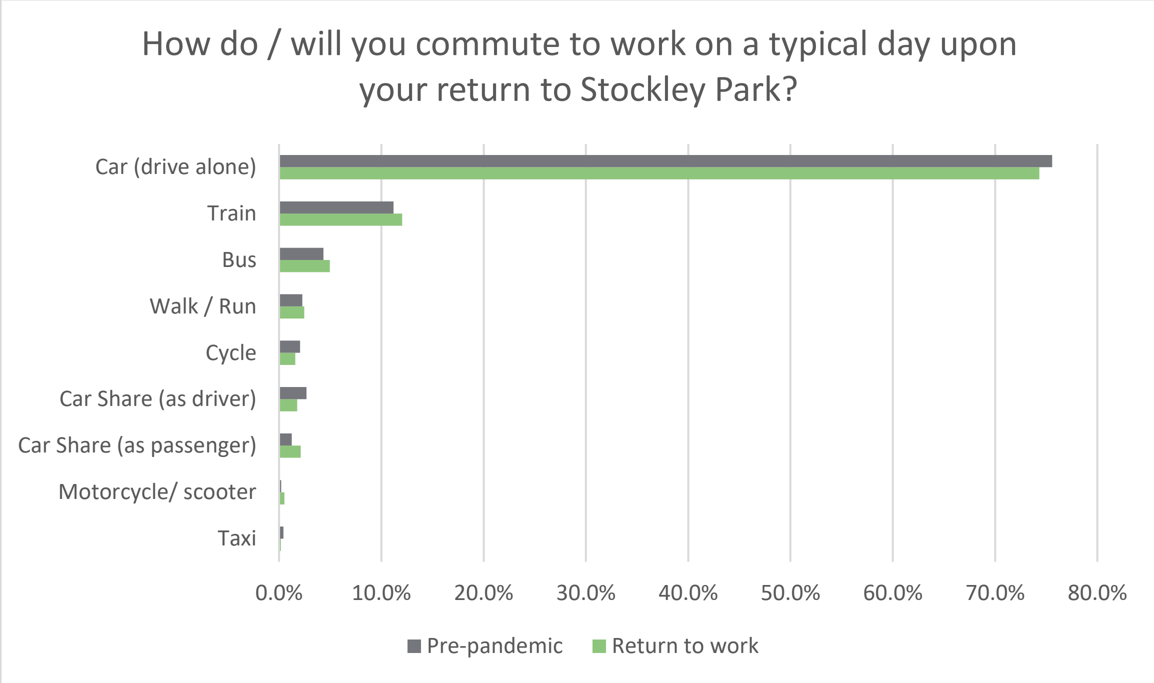
Figure 2-8 How Often are you Expecting to Work from Home?



2.2.5 **Figure 2-9** compares the mode of transport used by respondents just before the pandemic and the mode used or intending to be used upon returning to the office. The Pandemic appears to have had little impact on the respondent's main mode of transport to work, with a 1.9% reduction in single occupancy vehicle travel and cycling, and a 1.5% increase in use of public transport, 0.2% increase in walking, and 0.2% increase in motorcycle/scooter travel.

2.2.6 Of those who used a car before the pandemic, only 11 have switched to public transport and active travel. 9 Respondents have switched from commuting via public transport to private car since coming back to the office. Safety concerns and convenience were among the most cited reasons for this change, but this is surprisingly low.

Figure 2-9 Mode of Transport Used Pre and Post Pandemic



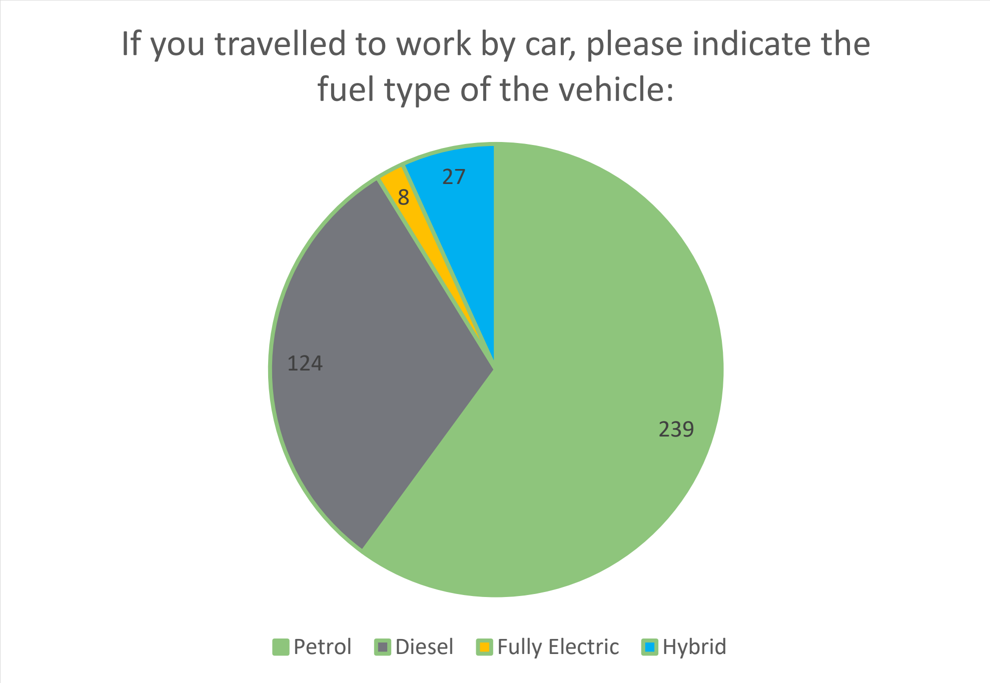
RESPONDENTS WHO COMMUTE BY CAR

2.2.7 78% of respondents are planning to or currently commute to the office via car or car share. Convenience safety/comfort and the unavailability of convenient public transport were the three most cited reasons for continuing to use a car as the main mode of transport. Many respondents live over 20km from Stockley Park and felt transport options other than a car would take more time, require too many changes and are of greater expense. Other reasons were the lack of safe cycle routes and managing other personal responsibilities such as dropping children off at school.

2.2.8 **Figure 2-10** shows the fuel types of cars respondents used to travel to work. While petrol and diesel engines still make up the sizable majority, approximately 9% of all vehicles travelling to/from Stockley Park are electric or hybrid vehicles, raising the question whether there are sufficient workplace charging facilities to accommodate an increase in demand.

2.2.9 When asked if there are any additional measures that would encourage staff to travel sustainably, facilitate your journeys or simply make your journeys safer in 2022, 45 respondents cited the need for more charging points for electric vehicles.

Figure 2-10 Fuel Type of Those who Travel by Car



RESPONDENTS WHO COMMUTE BY PUBLIC TRANSPORT

2.2.10 Respondents that travel by train were asked to advise whether the stations they arrive to would remain the same post pandemic, with the majority still indicating they would travel through Hayes and Harlington station. There has however, been a 5% drop in travel through this station towards West Drayton.

2.2.11 The following figures shows the current and predicted change in travel by bus.

Figure 2-11: Pre-Pandemic Travel by Bus

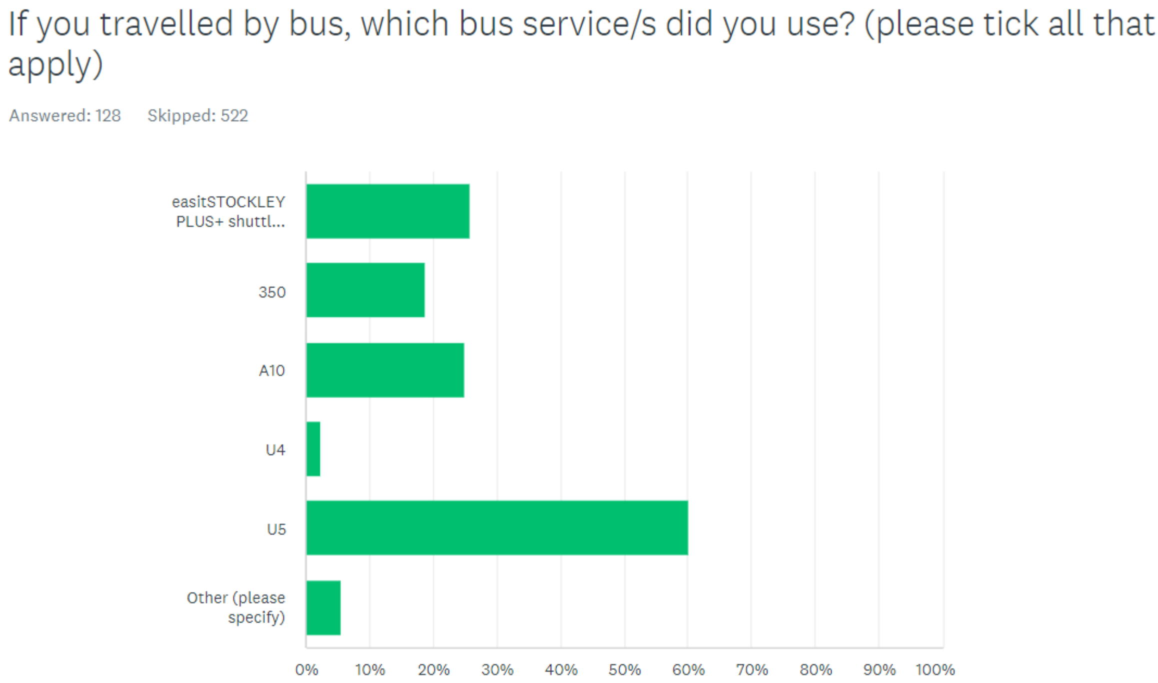
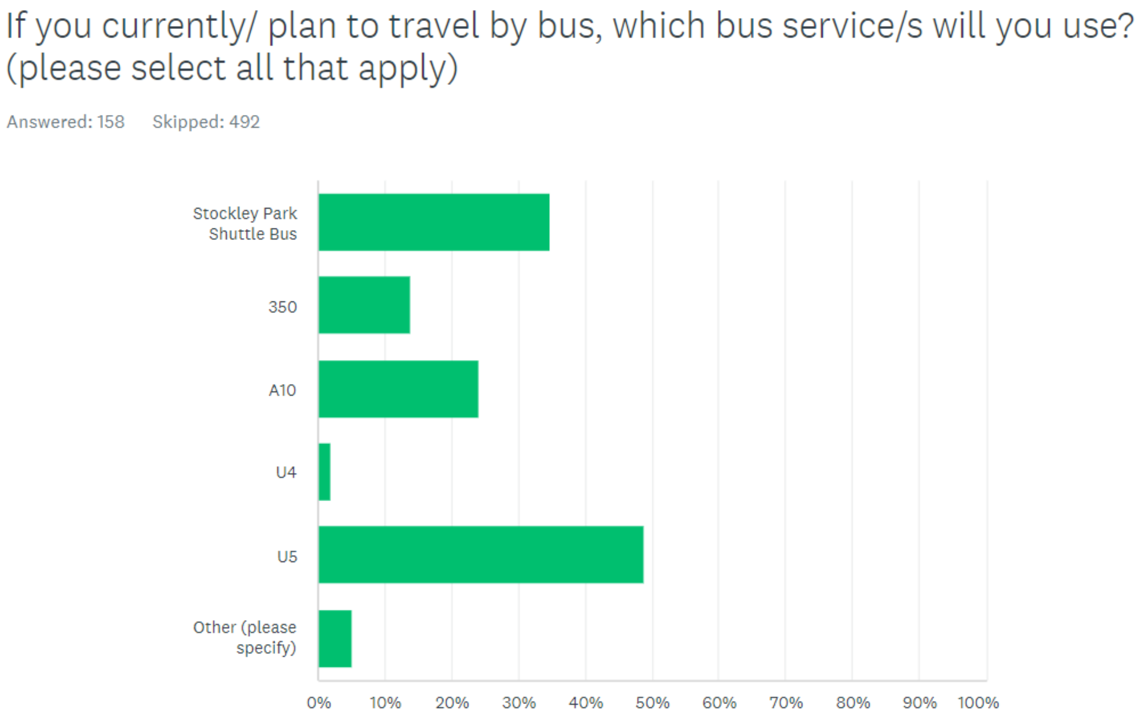


Figure 2-12: Post-Pandemic Travel by Bus



2.2.12 The U5 was the dominant travel option carrying 60% of the demand, followed by the Stockley Shuttle at 26%, and closely the A10 and 24%. Most notably, there is expected to be an increased reliance on the Stockley Shuttle at the expense of the U5 public service (a 10% switch) and which may be directly related to nervousness over volume of passengers using the latter.

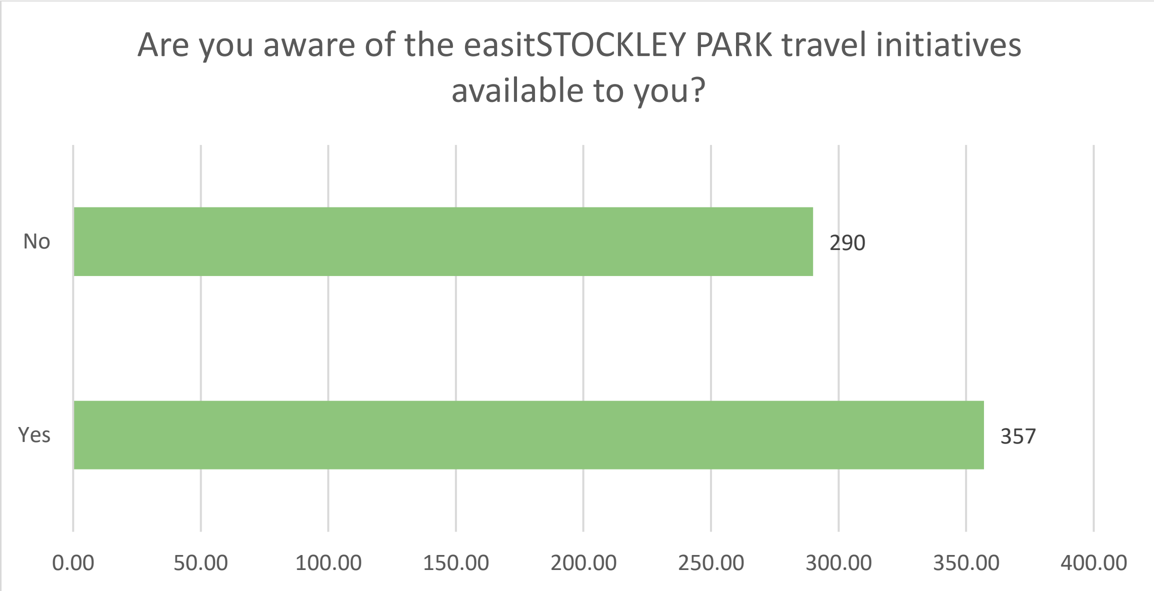
2.2.13 Open ended comments in respect of the Stockley Shuttle highlight that the Shuttle Bus is popular for those who use it. Other comments highlighted that the service could be improved through increasing the frequency of the services and providing additional routes from other local rail and tube stations (though this has been explored on several occasions but demand not considered to warrant service alterations).

RESPONDENTS WHO COMMUTE BY ACTIVE MODES OF TRAVEL

2.2.14 **Figure 2-9** earlier in the report highlighted a reduction in the proportion of respondents choosing to cycle to work compared to pre-covid levels. The lack of dedicated cycle routes was a concern highlighted in many open-ended responses.

2.2.15 Tenants were asked to confirm if they are aware of the easitSTOCKLEY PARK travel initiatives with a majority indicating that they are, and which is a 5% increase since 2018. While 290 respondents advised they are unaware of the initiatives, this can only be seen as an opportunity in that many staff (possible new arrivals) can be made aware of the benefits.

Figure 2-13 Awareness of easitSTOCKLY PARK Travel Initiatives



2.2.16 Many open-ended responses highlighted the expense and lack of feasible alternatives to commuting by car, however park of the issue may be that tenants do not for example realise that the Stockley Shuttle is free to use.

2.2.17 The survey was live during the peak of Omicron variant infections, so the spread of Covid on public transport made up the majority of safety concerns for respondents (72 answers). Other responses included concerns over footpaths not being lit when its dark, especially along the canal towpath.

Figure 2-14 Safety Concerns Around Travelling to Work

2.2.18 **Figure 2-15** shows that 59 respondents are interested in attending a travel workshop to expand on the issues and opportunities related to staff returning to the office and a workshop will subsequently be arranged to co-ordinate this feedback which will be invaluable.

2.2.19 A considerable level of respondents provided feedback on travel matters generally within the estate, with over 256 open ended responses, including 72 related to safety. These will be grouped into themes, presented and discussed at the travel workshop to facilitate discussion, and obtain the views of tenants on matters considered most beneficial to address and likelihood of success.

Figure 2-15 Interest in Attending Travel Workshop