



## Ecomm 2003

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**Title:** Towards a more qualitative survey method in green commuter plans ; the experiences in two case-studies.

**Workshop :** Monitoring and evaluation  
1b, Travel pattern analysis and process feasibility surveys as a basis for mobility management strategy and actions

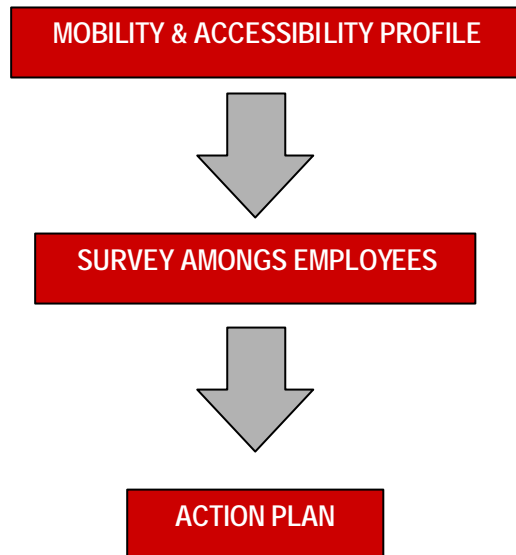
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### Introduction

In two recent projects, Traject tried out a new methodology of making a green commuter plan for companies. The methodology used in the past was somehow changed to raise the input and consultation with the involved parties : the employees and the management. Instead of having a more quantitative, only objective collection of data this new approach is a more qualitative one. In my presentation I will describe and evaluate this methodology by showing the process and the outcome of two commuter plans : one for the Province Council of Limburg and one for the Gasthuisberg Hospital in Leuven. In this paper I describe in a more theoretical way the differences between the former methodology we used and the newer one.

### The traditional methodology

In the past, all the green commuter plans made by Traject used more or less the same steps :



The accessibility profile presents the supply site of the mobility market. It gives an overview of the accessibility of a work location by all transport means : public transport, bike, car, walking... An overview is made of the buses, trains and trams that come in the neighbourhood of this location. The quality of the cycle routes near the company were evaluated a.s.o. In fact, the accessibility profile gives an idea of all possible ways to reach the company.

On the other hand, the mobility profile gives information about the demand site of the mobility market. The mobility profile is based on information provided by the company : a database with the addresses of the employees, an overview of the working schedules (e.g. the time window in which employees are allowed to start), the frequency of business trips etc. It gives an overview of the need for mobility employees of the company have : where do they come from, when do they have to start and stop working, do a lot of people need there own car for business trips ...

By comparing the mobility profile with the accessibility profile, information is provided about the way the supply site fits with the demand site. Answer is given to questions like "Does the time schedule of the public transport fit with the working hours of the company ?". "Is there a good offer of buses from the surrounding regions where most people working in this company come form ?" "If the mobility profile shows that the

majority of employees live in a town nearby the company, are there safe and comfortable cycle routes between the town centre and the company?"

Answers to these questions give a first insight on which mobility actions could be useful for this company. It can be noticed that introducing a bus line between a village where a lot of employees live and the working spot could be a good idea. Based on the home to work distance of most employees the use for the company of investing in good bicycle storage facilities can be evaluated.

Briefly, the objective data provided by the accessibility and the mobility profile give a first indication of possible actions. Even if some actions seem to be useful based on this objective information, there is no guarantee that this is what employees are waiting for. Suppose a new bus line links the town centre with the company, there is no guarantee that employees will take this bus. Mobility management is no exact science ; the reason why people do or do not use the bike, public transport or carpool to their work location is more related to personal, even psychological reasons. Especially for their home to work trips, people expect a minimal level of quality (comfort, time, flexibility...) for their trip. Gathering information about these personal needs and wishes is necessary to come to a efficient list of measures in a green commuter plan. The traditional way to get this information, is by organizing a survey amongst employees.

In our opinion, getting information about what employees want, is only one of the advantages of organizing a survey. In general there are four aims we try to reach with a survey amongst employees :

1. to communicate about the commuter plan

The questionnaire is in most cases the first moment employees are informed about the fact that the company is making a green commuter plan. In the introduction or in the accompanying news letter, the company can inform his employees about the reasons for making a commuter plan, about the working schedule and the timing. Some key data from the mobility profile (e.g. "where do most people working in this company, come from?") can already be presented as an introduction to the survey.

2. to complete the objective data needed for the mobility profile

Most companies have only limited mobility information about there personel. Based on the number of public transport travel cards the company has to reimburse employees for<sup>1</sup>, companies have a good view of the

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<sup>1</sup> The belgium low obliges companies to pay back 60% of the cost of a public transport *abonnement* for the home work distance

(theoretical) number of public transport users. The number of cyclists and especially the number of people carpooling, is usually unknown. In most cases, one can only get information about the modal split by organizing a survey. The same for business trips : while companies can give general information about the estimated number of business trips employees have to make, information about the destination, the mean and the frequency of business trips on the individual level can only be provided by survey results.

### 3. to collect remarks or problems about mobility related issues

A survey gives every single employee the chance of formulating his or her personal input to the commuter plan. The questionnaire gives a least the idea that the company will take into account the meaning of the employee. Via the survey employees can point at problems or mobility issues they want the company or the study office to know about.

### 4. to get information about the basis for sustainable transport modes amongst the employees

Based on the information provided by the mobility and accessibility profile, one can already have a good view on which actions could be effective for the mobility issues of the company and her employees. However, employees and employers do not always agree with the solutions suggested by the mobility specialists. A survey gives an idea of about the existing basis for mobility actions amongst employees. It indicates the positive or negative attitude of employees against mobility measures and in this way shows the degree of resistance that can be expected when introducing different actions.

In fact, the survey is the last step in collecting the necessary information for developing an efficient green commuter plan.

## **Evaluation of the traditional methodology**

The fact that this methodology is used for more than ten years shows already the usefulness of this method. It is a standardised methodology, easy to use and it does not need a lot of collaboration and time investment of the company and its employees. Only for the (organisation of the) survey collaboration of the employer and the employees is needed. Lately, however, the limitations of this methodology became more and more clear. A lot of commuter plans made in the last decade did not really get beyond the planning phase. Quite often a plan was made with a lot of measures to be implemented, but in often only a part of these actions or only minor measures have been implemented. We believe that a higher involvement of the employees in the planning process can contribute to more realisations after the plan is made.

As mentioned above, the survey was the only moment where employees could give their ideas and opinions. As the aim of the surveys was to have as much answers as possible, in most cases a closed questionnaire was used with only limited possibilities for the employees to raise issues that were not in the questionnaire. Therefore, employees often felt that the green commuter plan was made above their head and that the result of the plan were only new obligations and rules, especially against the majority of the employees : the car drivers.

In the past, most surveys organized in green commuter plans, reached a response rate of 40 tot 50%. Not bad, but on the other hand the dark number (the number of employees who did not answer the questionnaire) is quite high. It is expected that employees that bike, use public transport or drive together with colleagues, are more likely to answer on a mobility survey than the "hard liner" car drivers. If this is true, the results of the survey could be biased and more critical approach of the survey results is needed. Another problem is that recently the number of surveys people are confronted with in their daily life, becomes too high. Sociologists are even talking about an over-questioned society. The willingness of people to fill in the umpteenth questionnaire is getting lower and lower and a response rate of 50% is hardly ever reached.

These problems, but especially the fact that too many green commuter plans did not reach the implementation phase because employees did not feel involved in the planning process, made us think about adapting the existing methodology. The adapted methodology was tried out in two recent commuter plans : one for the Council of the Province of Limburg and one for the Gasthuisberg Hospital in Leuven. Before giving the results of this new approach in these tow plans, I will first describe the adaptations we made in the planning process,

### **The *new* methodology**

It is not correct to talk about a new methodology. We did not start from zero, but kept all elements and steps of the traditional methodology because we still believe in the usefulness of this methodology. To get a good insight in the problems and opportunities a company has concerning mobility, a mobility and accessibility profile is necessary.

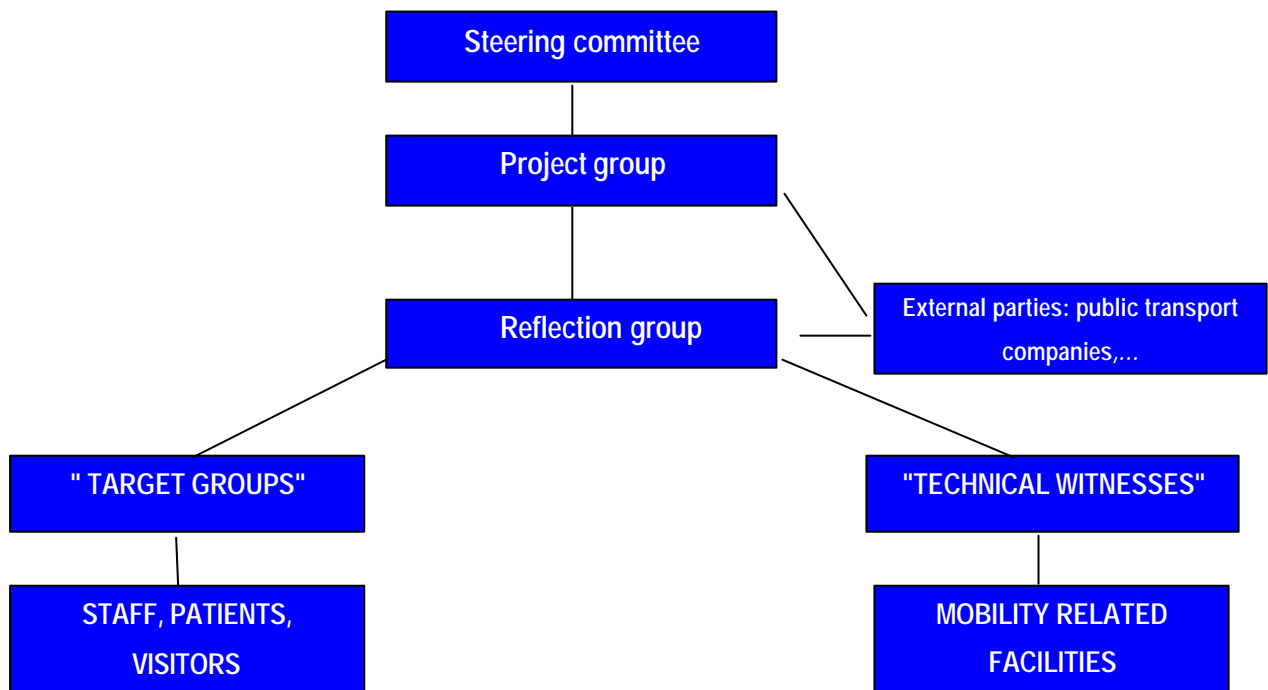
The aim of the adapted methodology was to increase the involvement of the employees in the planning process. We tried to reach this aim by creating a clear consultation process and by introducing a new part in the planning process, the discussion groups.

## An enlarged discussion structure

The new discussion structure has three functions :

1. to support the whole planning process
2. to verify the basis for mobility actions ; to estimate the feasibility of measures
3. to take decisions and commitments

These functions were divided over three different groups : the steering committee, the project group and the reflection group (see scheme below). The new consultation structure was first introduced for the Gasthuisberg hospital in Leuven. For the Province Council of Limburg the structure was similar.



The engine of the planning process is the project group. The project group consists of the contact persons of the initiator (in case of the Gasthuisberg Hospital : the environmental coordinator and a key person of the human resources department) and the mobility consultants of Traject. In fact, most study work is done by Traject, but necessary information is provided by the two "internal" people from the hospital in the projectgroup. If the mobility consultant has some questions or wants to check some information, he knows who to contact and he is sure these persons will have an answer. In this way, the initiator is following from very close the whole planning process. Beside fulfilling the first function (following the process), the project group is also the first forum where information about the feasibility of mobility measures can be won.

The reflection group plays a very important role in the planning process. On the one hand the reflection group helps realising the project by providing complementary information, on the other hand this group reacts on proposals made by the project group. To fulfil both functions, the constitution of the reflection group is crucial. The reflection group consists of representatives of different departments and / or type of employees. These representatives of the target groups are not necessarily the heads of the department. On the contrary, to have an open discussion in the reflection group, it is better not to have too many hierarchical differences between the members of the reflection group. By representative we mean someone who knows what is going on in his or her department. He or she does not have to make decisions in the name of his colleagues, but knows which mobility problems or concerns people in his department have. E.g. a department where employees have to make lots of business trips will have other requests towards a green commuter plan than employees who work nine to five at the same desk. Beside the representatives of the different departments the reflection groups consists of so called "technical witnesses" : people who are well informed about mobility related issues like parking infrastructure, future plans about the building etc. They have to be aware that the green commuter plan is linked to other plans the company has or that actions from the green commuter plan are also included in other plans e.g. about parking infrastructure. Finally, the trade unions are also invited to have a representative in the reflection group. In this way the trade unions are involved from the start and they have the opportunity to present their mobility issues from the beginning of the process.

The green commuter plan is made by the interaction and the discussions in the project group and – especially – in the reflection group. In this way, the green commuter plan is not something that is done only by so called experts, but is something that is made together with key persons and employees from the whole company. Of course, the proposals are made in the project and reflection group, but the decisions have to be taken at management level, i.e. in the steering committee. The steering committee consists of the decision makers themselves (e.g. head of the human resources department, general manager...) or their representatives. The steering committee takes decisions during the planning process (e.g. about the content of the questionnaire) and approves the final action plan.

### **Discussion groups of employees**

Beside the enlarged discussion structure, another change compared to the former methodology was made by introducing discussion groups following on the survey amongst employees. These discussion groups are outside the above outlined discussion structure and are formed after the survey is held. As in the past, all

employees receive a questionnaire dealing with mobility problems and proposing different measures. In this questionnaire, employees are also invited to take part in a discussion group to be able to formulate their wishes or problems and to discuss the green commuter plan. The survey is usually anonymously, but people who want to participate in the discussion are invited to give their name and contact data. After the survey results are analysed, all volunteers are split up in several discussion groups. The aim of the discussion groups is to critically study the survey results and – if necessary – to complete information gained out of the survey. A second function of the discussion groups is to provide detailed information that cannot be gathered by doing a survey. In this sense, the discussion groups fulfil the same function as the reflection group but with a larger number of people.

By organising discussion groups all employees are given the possibility to formulate their idea and wishes on the green commuter plan. Unless in the former commuter plans, there is now a direct involvement with the employees. The discussion groups are also a good way to inform a large number of interested employees about all study work that is done. At the moment decisions are made, a large number of employees know the how and the why of the mobility measures that are to be implemented and can communicate this in an informal way to the colleagues of their department.

As in the past, the survey gives the possibility to all employees to give their meaning on issues dealt with in the green commuter plan. With this new methodology however, people can really go into discussion with the “makers of the plan”. Their remarks or complaints are presented to the reflection group and are really taken into account in the whole planning process. The benefit of working with discussion groups is clearly demonstrated in the green commuter plan for the Province Council of Limburg.

### **Example : a green commuter plan for the Province Council of Limburg**

The whole planning process in the Province Council of Limburg was followed and conducted by the discussion structure as presented above. After the mobility and accessibility profile were made, an internet based survey<sup>2</sup> was held amongst all 1240 employees. 570 employees filled in the questionnaire, resulting in a high response rate of 46%. 61 employees respond to the invitation to participate in a discussion group. As the aim of the discussion groups was to gather more information and not to persuade one another of the need or advantages of the different modes, the project group decided to choose for a “consistent” constitution of the discussion groups : cyclists together, users of public transport together and car drivers

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<sup>2</sup> Employees who did not have internet access got a paper version of the questionnaire



together. Spread over three days, 6 discussion groups were held : one with cyclists, one with public transport users and four with car drivers, including carpoolers. The outcome of the discussion groups was amazing : lots of small actions and easy to implement measures were suggested by the employees. As noted in the accessibility profile the Province Council does have a guarded bicycle parking in the basement, but some cyclist testified that in the past some bikes had been stolen because the secured door was not secure at all. Though the door could only be opened with the employees badges, a small push at the door was enough to open it. In the survey no one mentioned this problem. It was only in the discussion with the cyclist that this problem was introduced. One of the first realisations of the green commuter plan was to install a new security system in the bicycle parking. The discussion with the public transport users also showed problems the project group was not aware of. One employee came 4 days in a week by bus to the Council but was obliged to come 1 day by car because the time schedule of her bus (only one an hour) did not fit with her working hours : the bus arrived 15 minutes before the start of the gliding hours and, because of the low frequency of buses, she could not stay too late in the afternoon, so she "lost" every day 15 minutes. To recuperate this time, she came ones a week by car. By allowing this woman and her colleagues in the same case, to start working (7.45 am) earlier than generally allowed (8 am) she can come every day by bus.

Car drivers came up with solutions too : a lot of people came from the north of the Province and although in theory they had a good bus connection to the work location, it turned out that the connection between the regional bus and the city bus was missed 60% of the times. Based on a suggestion made by an employee, the public transport company made a connection between the regional bus and an (empty) school bus going to the main work location of the Province.

Apart from these smaller measures, nearly all measures of the action plan (approved by the Deputation of the Province in December 2002) are already implemented or will be implemented this year. Others (e.g. a system of pool cars for business trips instead of the actual reimbursement of private kilometres) will be studied more in detail before being implemented. The most important actions amongst a list of 25 are : a cyclist allowance of 0,15€ / km, subscription to the Flemish Carpool Database, reserved parking lots for carpoolers, cycle storage facilities for all locations where employees of the Province are working, a bicycle repair service every two weeks provided by a local bicycle trailer, shuttle bikes for public transport users, a mobility lottery etc.

## Evaluation of the “new” methodology

The methodology with the enlarged discussion structure and the introduction of discussion groups after the survey, proved its use in the green commuter plans for the Province Council and for the Gasthuisberg Hospital.<sup>3</sup> It is clear that the involvement of the management and the employees is much larger than in the past. Employees feel really involved in the process and this increases the feasibility of all mobility measures. The parts of the traditional methodology (mobility profile, accessibility profile and a survey) are still indispensable but the increased involvement of the employees facilitates the transition from planning phase to implementation phase.

The workload of this new methodology is more or less the same as in the traditional methodology but it demands extra skills of the mobility consultant. While in the past most work was done from behind the desk, now the discussion structure and the discussion groups with the employees demand good communication skills of the mobility consultant. The frequency of meetings is quite high too, especially with the project group and the reflection group. However, while in the past the emphasis laid on the plan (the report) itself, now it is more the process that is important. If the actions in the green commuter plan are discussed and approved by the different groups, the chance that these actions are implemented is high.

Based on the experience of the two described plans, Traject uses this methodology in all recent green commuter plans we are asked for. The future will have to confirm the real surplus of this methodology.

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<sup>3</sup> Due to a change in the management of the hospital no official decision about the implementation phase has been taken yet, but unofficially there is an agreement about which actions (e.g. parking management) to take.