



**2023 Park Staff Travel Survey
Hillington Park, Glasgow**



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1 INTRODUCTION

1.1 The 2023 Hillington Park Staff Travel Survey was undertaken between May and June 2023. The survey was the result of a collaborative effort between Frasers Property and Connected Transport Planning Ltd.

1.2 This Staff Travel Survey report provides a summary of both the survey methodology and the survey results.

1.3 The survey should be read in conjunction with the Hillington Park Staff Travel Plan produced in June 2023.

What is the Staff Travel Survey?

1.4 The Staff Travel Survey is a survey of all staff employed within Hillington Park. The survey seeks to capture the current travel behaviours of staff employed and learn about the challenges and opportunities that if addressed, could reduce staff travel by private car and dependency on single occupancy car-based trips.

1.5 The survey is important as it provides a statistically representative 'snap-shot' at an appointed time of how staff within the park travel and the reasons for their travel mode decision making. By understanding how staff currently travel and their reasons for making their travel choices, decision makers and investors responsible for the management, operation and investment into the park are able to make more informed investment decisions.

1.6 The survey does of course provide a snap shot of travel behaviour beyond the parks boundaries. It provides an insight into the challenges faced by people who commute everyday into the park and provides pointers towards wider connectivity and network operation challenges faced by Glasgow City Council, SPT and Renfrewshire Council.

1.7 Hillington Park is noted to be one of Scotland largest open space retail, industrial business Parks and is a significant employer within the region. As the results will demonstrate, the park employs staff travelling from across the Central belt including trips originating in Aberdeen. As such, there is a responsibility on the park and the neighbouring partner authorities to collaborate in a meaningful way to invest in network development and travel mode choices that will encourage travel by sustainable modes. This is critical if we are to maintain alignment with wider Scottish Government Sustainable Travel policy and the complimentary policies of Glasgow and Renfrewshire Council.

1.8 The last Staff Travel Survey of the Park was undertaken in 2014.

2 SURVEY PLANNING AND ADMINISTRATION

Defining the Survey Catchment Area

- 2.1 Hillington Park is owned by a number of organisations and has a complex operational structure. Frasers Property is the majority owner of the park. Staff employed within the park would in reality be oblivious to the ownership and would still expect to use a cohesive and effective transport network. This includes all journeys to and through the park.
- 2.2 It was agreed that irrespective of property ownership or businesses interests that the whole of Hillington Park should be included within the Staff Travel Survey.
- 2.3 It is noted that the Park includes a diverse range of business types operating in a diverse range of industries. These include large employers who employ many site-based staff and office-based employers who occupy rented office space within business hubs.

Survey Method

- 2.4 Through consultation with Frasers Property Marketing and Communications team, it was agreed that the online survey platform SurveyMonkey should be used to host the survey.

Data Protection and Security

- 2.5 The survey should maintain participant anonymity. To incentivise survey participation, it was agreed that a prize should be offered to recipients completing the survey process. The survey therefore includes a voluntary question to allow recipients to volunteer their contact email and business address to allow participation in the prize draw.
- 2.6 No personal details of recipients have been requested or are being stored.

Incentivising Survey Responses

- 2.7 A number of prize options were considered to incentives survey completion. Frasers Property have kindly offered to provide 5 new Generation 9 iPads that would be issued to survey participants post survey and at random. The prize was only available to participants who had requested inclusion in the prize draw and provided a valid survey response.
- 2.8 To maximise participants, three staff from Connected Transport Planning undertook a site visit on the 18th May the to visit random businesses with the park and determine if they knew of the survey and if their staff had participated. A positive point to note was the majority of business

visited knew of the survey or had already participated. A number of businesses were also displaying the survey flyer. It was concluded that media marketing had been effective in reaching a diverse staff audience across the park but that staff remained unincited to participate.

Identifying Survey Recipients

2.9 A key challenge to administering the survey was the obtaining of a valid recipient email address for all staff employed within the park. In the majority of cases, contact details that would enable the survey to be issued to every staff member were not available for the following reasons:

- Not all businesses within the park are known or can be identified. Use of the councils' commercial rates register would not be geographically specific enough to identify businesses with the park
- Some park businesses are registered elsewhere.
- Many businesses co-habit the same building.
- Reasons of commercial security meant that staff email addresses were not publicly accessible.
- Site based staff do not all use email.
- Contact details could only be shared through cooperation of business operators.
- Access to local designated representatives of business operations within the park could not all be obtained.

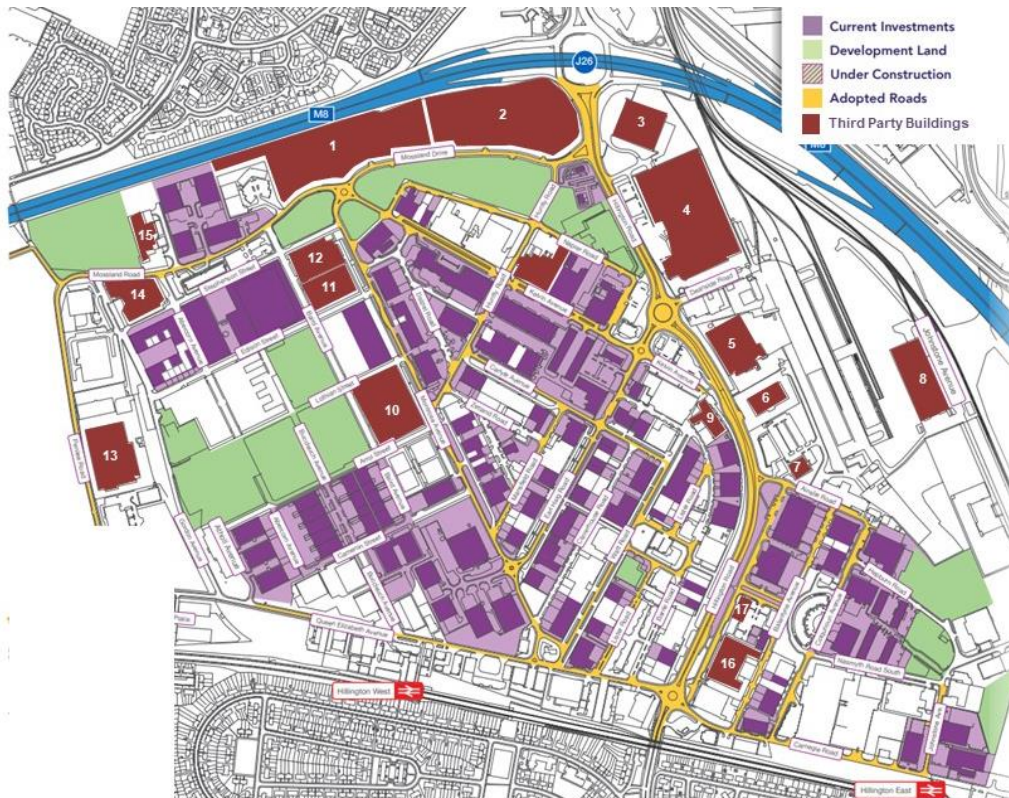
2.10 A 2-stage process was developed to maximise the survey audience this included:

Stage 1

2.11 Utilising Frasers Property business contact database and staff working relationships a master list of known operating businesses within the park was prepared. The list reflects Frasers Property majority ownership and so provided a good start point. Contact was made with each local business representative contact and an estimate of staff numbers employed by that business was obtained. The list was sorted to include the largest employers first. A named representative from Frasers Property with an established relationship with the subject business would then engage with that business to validate the contact details and confirm their willingness to participate in the survey.

2.12 The businesses identified through stage 1 were plotted to assist in understanding geographical location. These are shown in Figure 1.

Figure 1 - Stage 1- Plot of Known Businesses

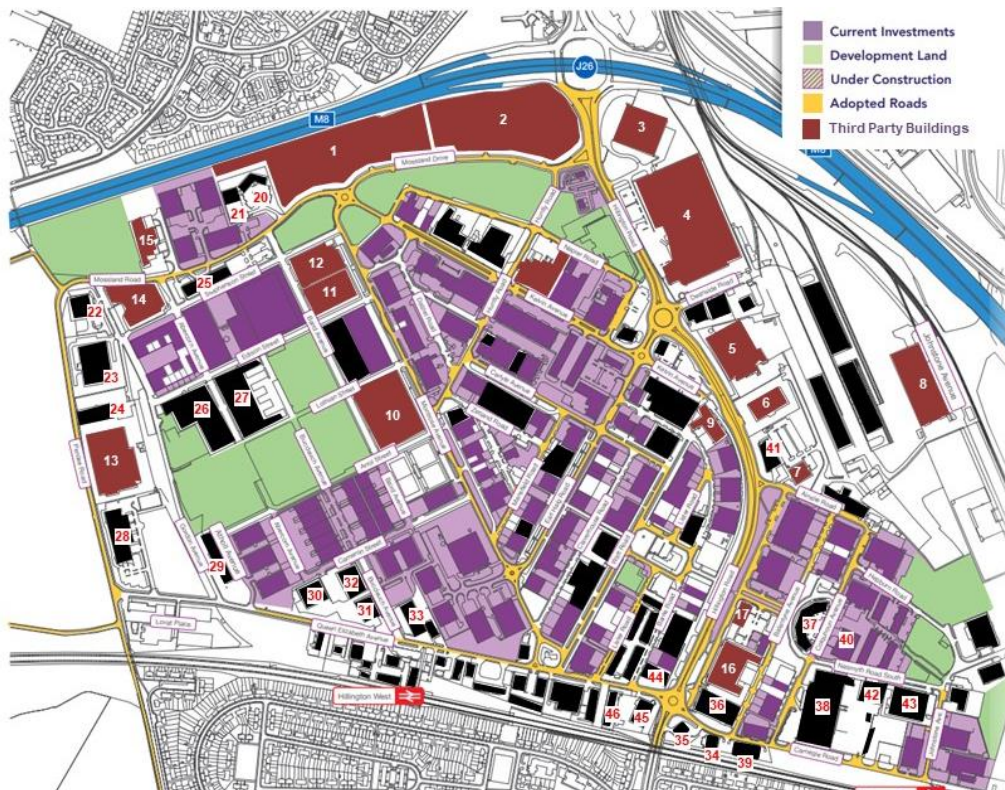


Stage 2

2.13 To further widen the survey audience, staff from Connected Transport Planning spent 1 day on site during the 3rd April to visit the businesses not identified within the stage 1 plan. The objective of the visit was to identify an appropriate designated individual within each business, introduce the survey and obtain a contact email which would allow the survey to be issued.

2.14 The businesses contacted as part of stage 2 are shown in Figure 2.

Figure 2 – Stage 2 – Plot of Unknown Businesses



2.15 It is noted that at this stage it was not possible to identify every business within the park. However, taking cognisance of the rule of diminishing return, the stage 2 business identification was considered appropriate.

2.16 A total of 276 businesses were identified through the process.

Media and Marketing Campaign

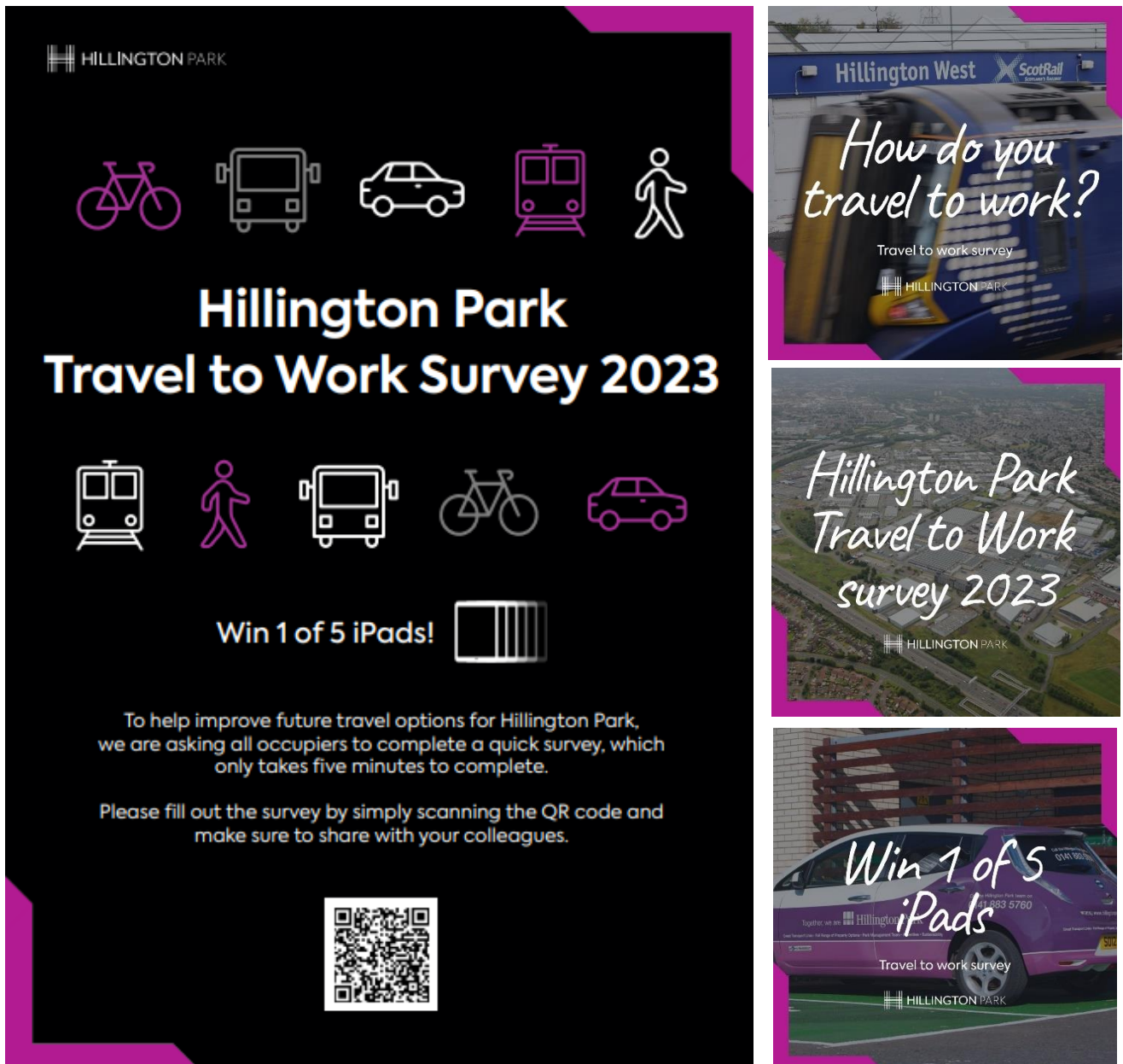
2.17 Frasers Property Marketing and Communications team led the survey campaign. A number of marketing flyers were developed to communicate the survey and the survey ambitions and incentivise recipients to respond. The materials were issued throughout the survey lifecycle including pre-event adverts and survey reminders. The campaign was primarily administered through the digital platform LinkedIn and supported by the consultancy and client staff involved.

2.18 A number of physical copies of the survey introductory leaflet were printed and distributed through the park to recipient offices and placed within key local services that staff may visit such as Baines the Bakers.

2.19 A number of business administrators or office managers were approach to act as 'Champions' for the survey process. The champions would issue the survey link and their own internal reminders via their organisational intranet and by email.

2.20 Examples of the media support provided to the survey are shown in Figure 3.

Figure 3 – Survey Media Support



3 SURVEY VALIDATION

3.1 The survey was activated on the 13th May and was open for responses until 9th June. The survey was extended for an additional 2 weeks to maximise responses. Table 1 Table 1 - Local Bus Service and Service Frequency Summary provides a summary of the survey key data obtained.

Table 1 - Local Bus Service and Service Frequency Summary

Metric	Data	Comment
Total Participating Businesses	276	From business contact planning exercise
Total estimated staff employed in park	6,500	Estimated. Based 6,500 reported staff in June 2013 travel survey
Total responses	541	All responses received pre validation
Total invalidated	32	Responses submitted but no data provided
Total Partial Completed	9	Responses submitted with only partial data completion
Total valid	500	Responses processed in analysis
Total in Prize draw	529	Responses where the participant has expressed willingness to be included in the prize draw.
Survey Response Rate	8%	Total responses vs. total staff
Actual Survey Response Rate	8%	Total valid responses vs. total staff

3.2 A review of the above table indicates that the survey achieved an 8% representation of the staff employed across the park when considering the total valid survey responses and the estimated total staff employed within the park.

3.3 Whilst this number is low, it does reflect the results of 500 individual responses which is considered a significantly large enough sample number to confidently represent the park overall.

- 3.4 By comparison the survey response received from the June 2013 Staff Travel Survey was 250 responses achieving a sample result of 4%. The results of similar surveys undertaken elsewhere typically achieve less than 22%.¹
- 3.5 The results of the survey are summarised in the remainder of this report.

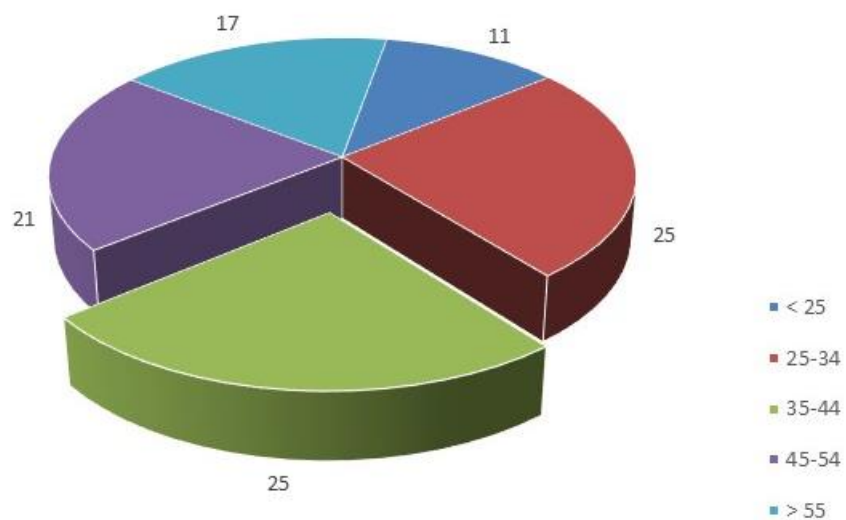
¹ Based on previous business experience.

4 DETAILS ABOUT THE PARTICIPANTS

Participant Age

- 4.1 Survey participants were asked to identify their age within one of 5 age group categories provided. The results show that the participants ages were evenly spread across the category groups with 32–34-year-olds the most represented (25%). The 35–44-year-olds were the next best represented at (25%). Under 25-year-olds was the smallest group at 11% which is still a large enough portion to reflect fair representation. Overall, it is concluded that the survey result reflects a statistically well-balanced age profile. The results are shown graphically in Figure 4.

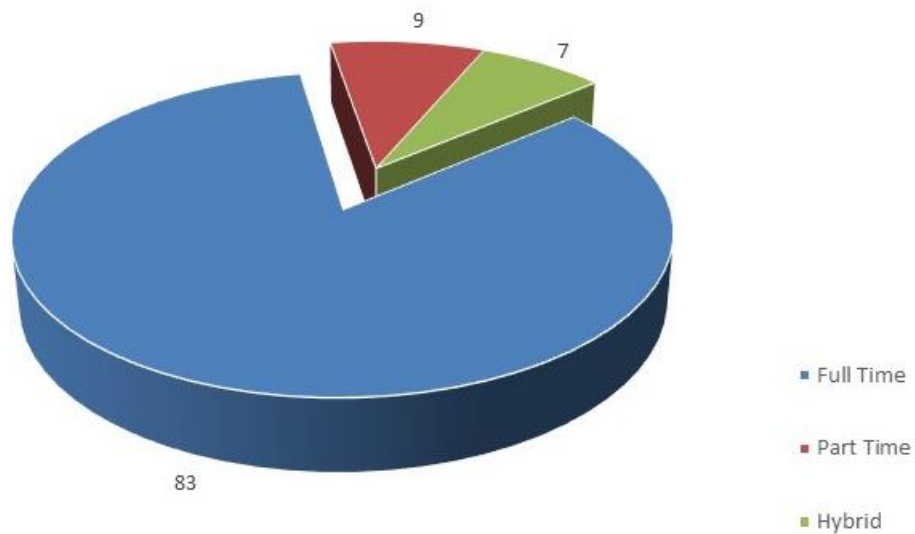
Figure 4 – Participants Age



Participant Working Patterns

- 4.2 Survey participants were asked to confirm the working pattern that best applied to them. The choices were Full Time, Part Time or Hybrid. A total of 507 responses were provided to this question. The majority (83%) work 'Full Time' with 'Part time' and 'Hybrid' roughly even at 9% and 7% respectively. This is a surprisingly result as the portion of staff working hybrid work patterns would have been expected to be greater post COVID19.
- 4.3 This result may reflect the fact that many businesses within the park require staff to be present on-site. The results are shown graphically in Figure 5

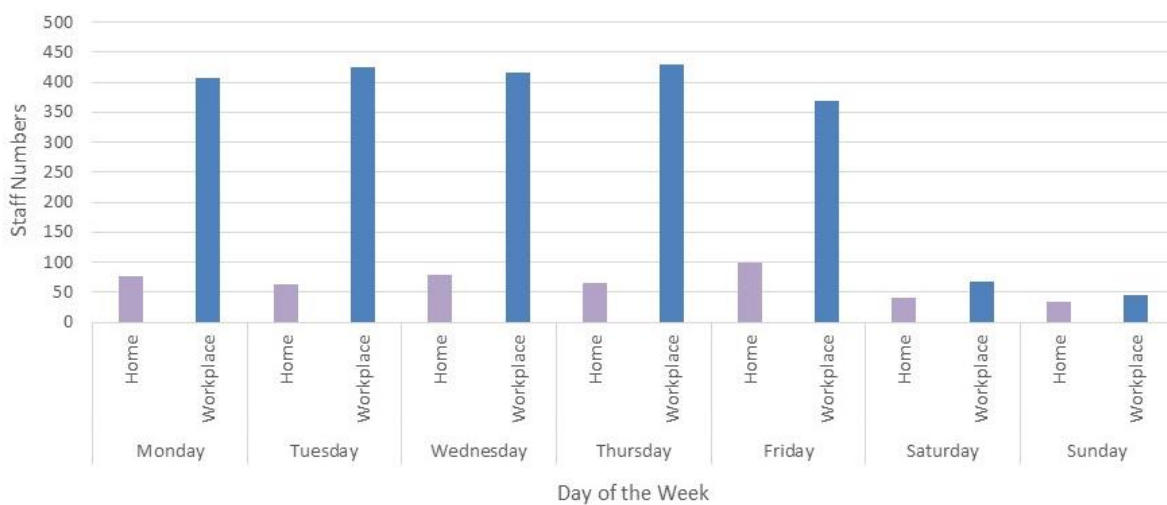
Figure 5 – Participants Work Patterns



Working Days and Home Working

4.4 Survey participants were asked which days of the week they work at the park or from home. The results show that Monday to Friday remain the most popular days to be working in the park and supports the responses to the previous question relating to working patterns. Fridays are marginally less popular and perhaps reflect increasing preference for hybrid working. By contrast Home working remains at a constant level through the week with a slight increase noted on a Friday. Again this may reflect the preference for hybrid working on a Friday. Weekend work does occur but as would be expected is a reduce levels to the weekday. The results are shown graphically in Figure 5.

Figure 6 – Participants Work Days



Participants Flexi-Time

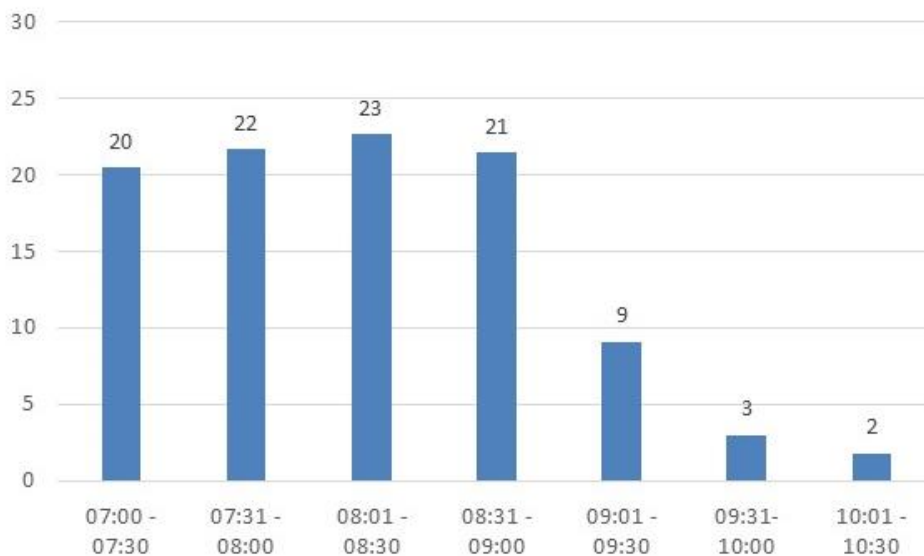
4.5 Survey participants were asked if they work regular shifts or flexi time. A total of 508 participants answered this question with the majority working regular shifts (91%) and only 9% working flexi-time.

Participant Work Time Arrival

4.6 Survey participants were asked to confirm the time they typically arrive at work within the park. The results show that staff arrive between 07:00 and 09:00 arriving evenly over 30 minutes up to 09:00. A smaller proportion of staff (9%) arrive between 09:00 and 09:30. Some staff are note to arrive after 09:30.

4.7 This is an interesting point as the results suggest a shift towards more flexible working and a reduction in the traditional network peak hour. The results are shown graphically in Figure 7.

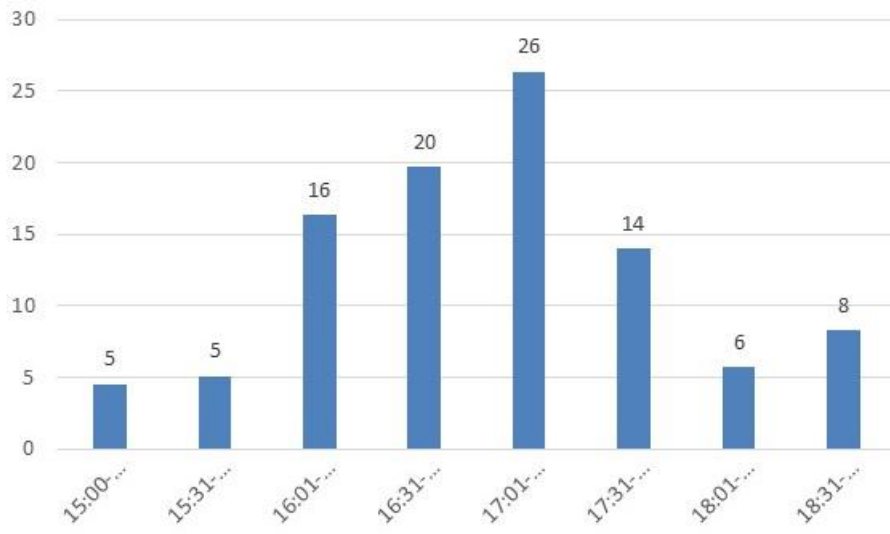
Figure 7 – Participants Work Arrive Times



Participant Work Departure Time

4.8 Survey participants were asked to confirm the time they typically leave work within the park. The results show that staff begin to leave from 15:00 (5%) with the majority leaving between 16:30 and 17:30. 17:00 to 17:30 is the busiest 30-minute interval where 26% of staff chose to leave. Staff continue to leave up to 19:00. Whilst flexible working may account for some of the spread across time, the traditional network afternoon peak is still clearly visible. The results are shown graphically in Figure 8.

Figure 8 – Participants Work Departure Times

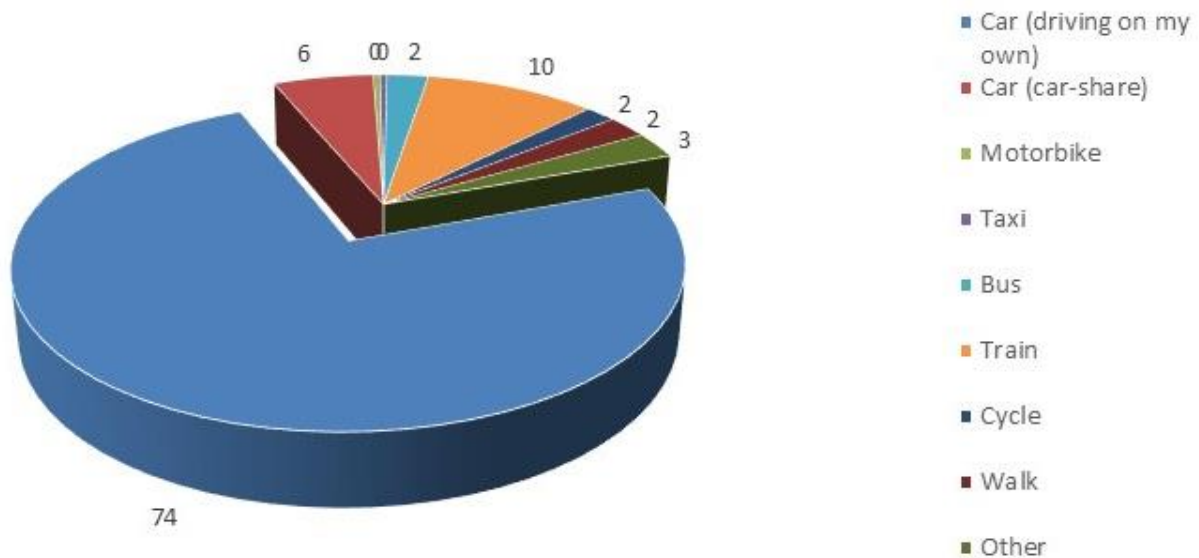


5 DETAILS ABOUT THE JOURNEY

Participant Work Travel Mode

- 5.1 Survey participants were asked to select from a drop-down menu of options the travel mode that they relied upon most commonly to travel to the park. The results indicate that the majority of participants rely upon the use of sole occupancy private car (74%). Train was the next most popular at 10% surprisingly followed by car share at 6%. Bus, cycle and walk were all equally unpopular at 2%. The results indicate that the park remains a very popular destination to drive to but that a good portion of car-share is being undertaken already. The results are shown graphically in Figure 9.

Figure 9 – Participants Work Travel by Current Travel Mode



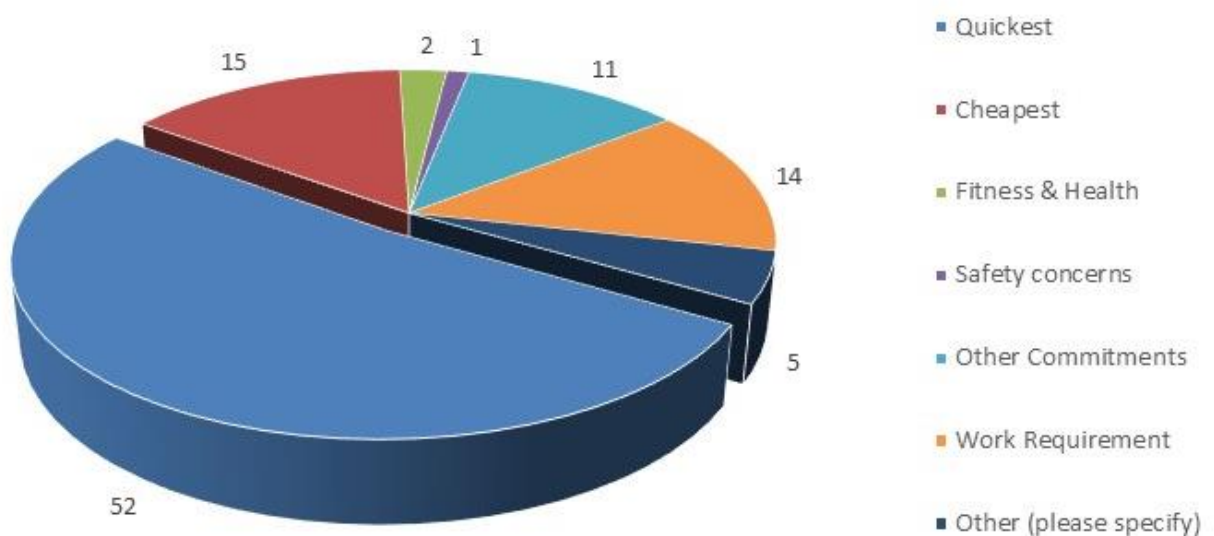
Reasons for Current Travel Mode

- 5.2 Survey participants were asked to select from a drop-down menu of options that best justified their travel mode decision when travelling to travel to the park. The question allowed more than one option to be selected per participant. Of the total responses received, the results indicate that travel by the quickest (52%) is the most important reason. Travel by the cheapest and Travel whilst at work requirements were the next most popular at (c.15%).
- 5.3 Around 11% of response related to other commitments and the responses received provided in order of decreasing significance:

- Very limited travel options from home address (bus and train);
- Public transport is too slow, poor value;
- Comfort and convenience; and
- Distance is too great.

5.4 The results are shown graphically in Figure 10

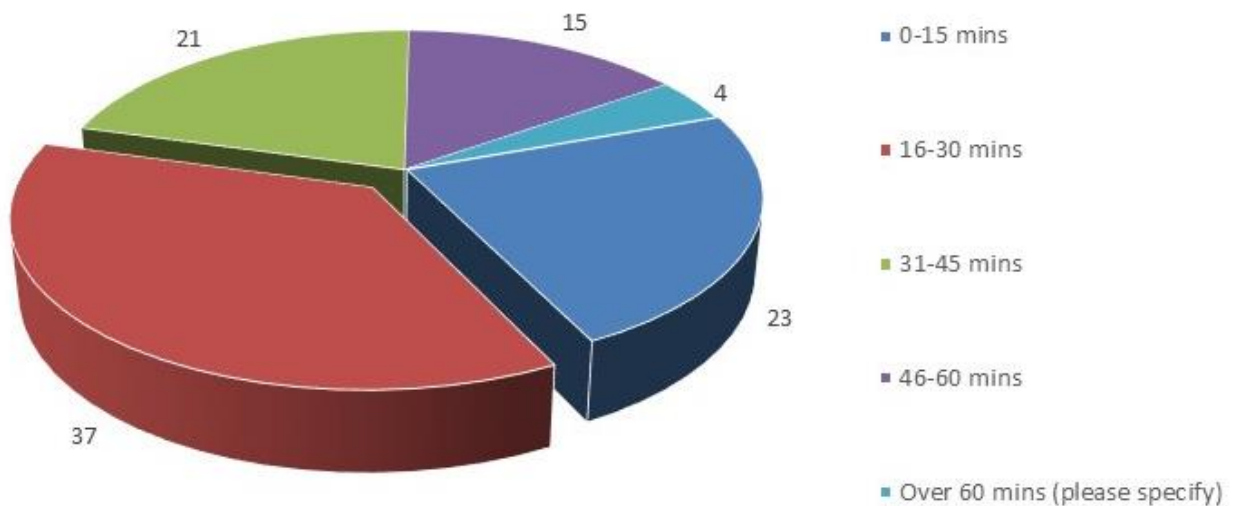
Figure 10 – Reasons for Current Travel Mode



Time Spent Whilst Commuting (Willingness to Travel)

- 5.5 Survey participants were asked to select from a drop-down menu of options the time they typically spend commuting to the park. The results indicate that 21% of participants spend only 0-15 minutes travelling to work and must therefore live nearby. The largest portion of 23% spend 16-30 minutes commuting and 21% take 31-45minutes to commute. These results combined indicate that 81% of the park staff live within a 45-minute travel distance of the park. This distances correlates to locations within neighbouring local authority boundaries.
- 5.6 A total of 20% of participants regularly commute in excess of 45 minutes to the park with some staff travelling from Aberdeen.
- 5.7 The willingness to travel and the parks location within the strategic road and rail network further highlights the parks significant role as a main employer for the region. The results are shown graphically in Figure 11.

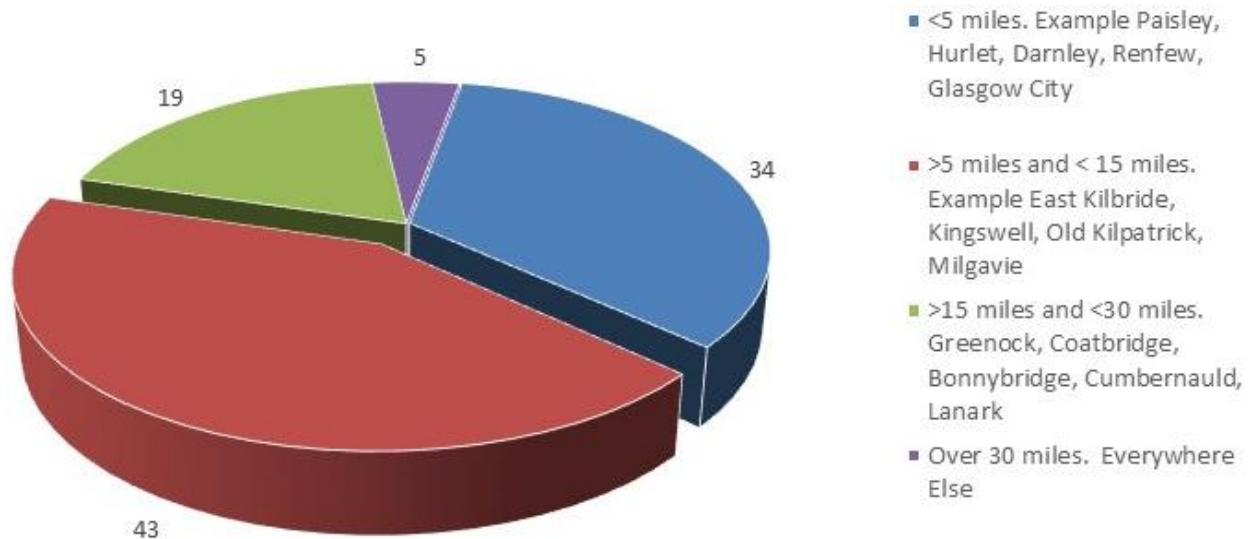
Figure 11 – Typical Commute Duration



Commuting Distance

- 5.8 Survey participants were asked to select from a drop-down menu of options the distance they estimate they live from the park. This question can be difficult to answer and so a range of options were provided as a guide to help estimate the distance. The examples include a number of locations with the participant would recognise. The results of the survey indicate that the majority of participants live within 5 and 15 miles of the park (43%). This correlates with the results of the previous question which highlighted that over half of the staff employed in the park (60%) travel less than 30 minutes and 81% travel less than 45 minutes.
- 5.9 A significant portion of staff (34%) live even closer at less than 5 miles and only 5% live much further away at over 30 miles.
- 5.10 The results again highlight the parks importance as a major employment hub for the region and the interdependency of the park on the surrounding regional transport network.
- 5.11 The results are shown graphically in Figure 12

Figure 12 – Typical Commuting Distances

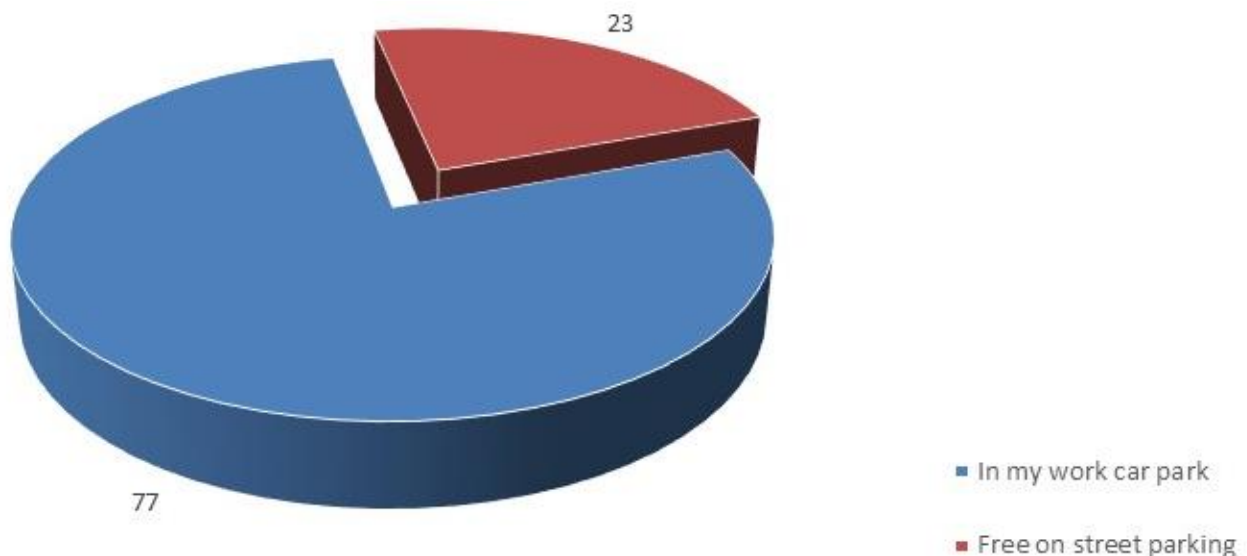


Parking Availability Within in the Park

5.12 Survey participants who chose to drive to the park were asked to select from a drop-down menu where they park on arrival at the park. The results indicate that 77% of respondents park in a work carpark with 23% parking on-street. An interpretation of this data is that staff parking can be easily located within the park and that there is limited requirement for most people to seek a parking space on-street. These results indicate that with excess available free parking within the park, staff are not incentivised to consider travel by alternative means. The level of freely available parking may therefore form part of a future intervention to help discourage single occupancy car use.

5.13 The results are shown graphically in Figure 13.

Figure 13 – Parking Availability within the Park



- 5.14 Survey participants who chose to drive to the park were asked how easy they found finding a parking space within the park. A total of 87% reported they could easily find a space with only 13% highlighting some difficulty.
- 5.15 This response supports the results from the previous question that parking within the park is generally in excess of demand.

Is your vehicle a Hybrid?

- 5.16 Survey participants were asked to confirm if they currently commute with a hybrid vehicle. 88% of participants do not use a hybrid vehicle. 12% of participants do use a hybrid electric vehicle. This percentage is lower when compared with the Scottish average hybrid car ownership at 23%.² The reason for this variation may reflect the job type, affordability, personal choice or infrastructure limitations such as a lack of EV charge points within the Park. It is not possible from the data provided to conclude a reason to support the response to this question but it is recommended that any future survey seeks to understand preferences around EV and alternative fuel vehicles.

Measures to Encourage Car Share

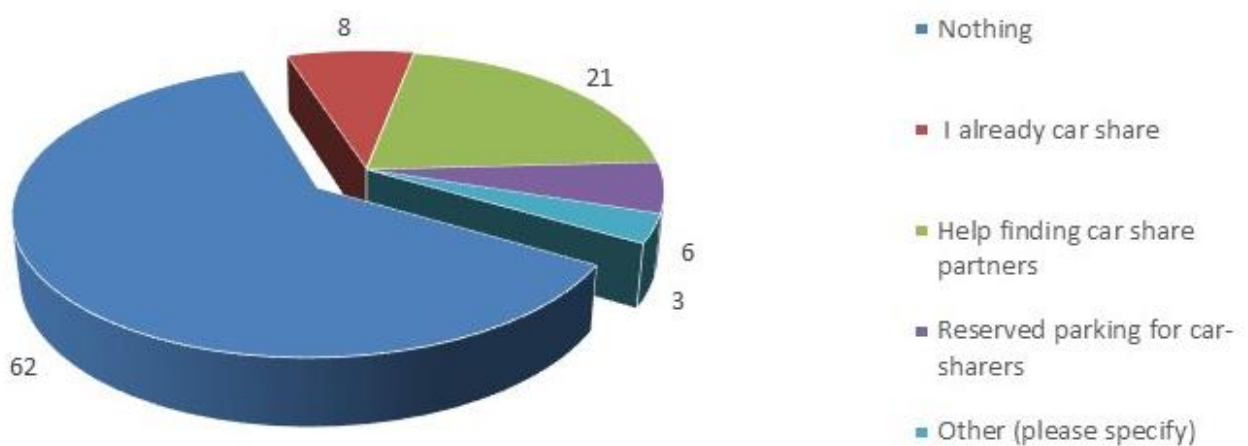
- 5.17 Survey participants were asked to confirm their view on car sharing with a colleague to work. Similar to the format of other questions, participants were given the choice of options to select which they felt best applied to them. Participants could again choose more than one option. A

² <https://www.zap-map.com/ev-stats/ev-market/#:~:text=The%20proportion%20of%20all%20new,were%20registered%20in%20the%20UK.>

total of 511 responses were provided to this question with 97% selecting the predefined options. A total of 3% of participants opted to provide a recommendation.

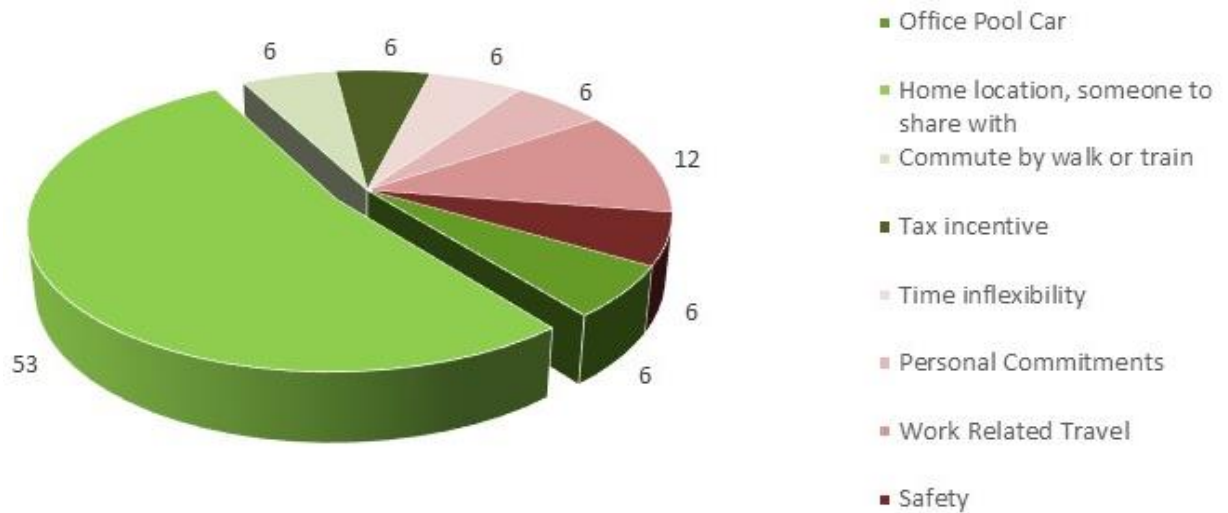
- 5.18 Of the predefined options provided, the majority (62%) indicated that nothing could be done to incentivise car share. The net largest portion (21%) indicated that help in finding suitable car share partners could be an option. Only 8% currently car share.
- 5.19 The results are shown graphically in Figure 14.

Figure 14 – Measures to Incentivise Car Share (97%)



- 5.20 The participant comments made under the 'other' options provided were analysed and grouped into 8 themes based on the descriptions provided by the participant. This was considered necessary to allow efficient processing of the data provided noting that some responses were lengthy.
- 5.21 A sub-analysis of the 3% of 'Other' comments indicated that the largest portion (53%) would benefit from identification suitable car share partners noting the challenges of wide spread 'home' locations. Tax incentives and provision of an office pool car were also noted.
- 5.22 Of the reasons provided not to car share, personal safety, onward commitments and work-related travel were all mentioned. The results are shown graphically in Figure 15.

Figure 15 – Measures Suggested to Incentivise Car Share (3%)



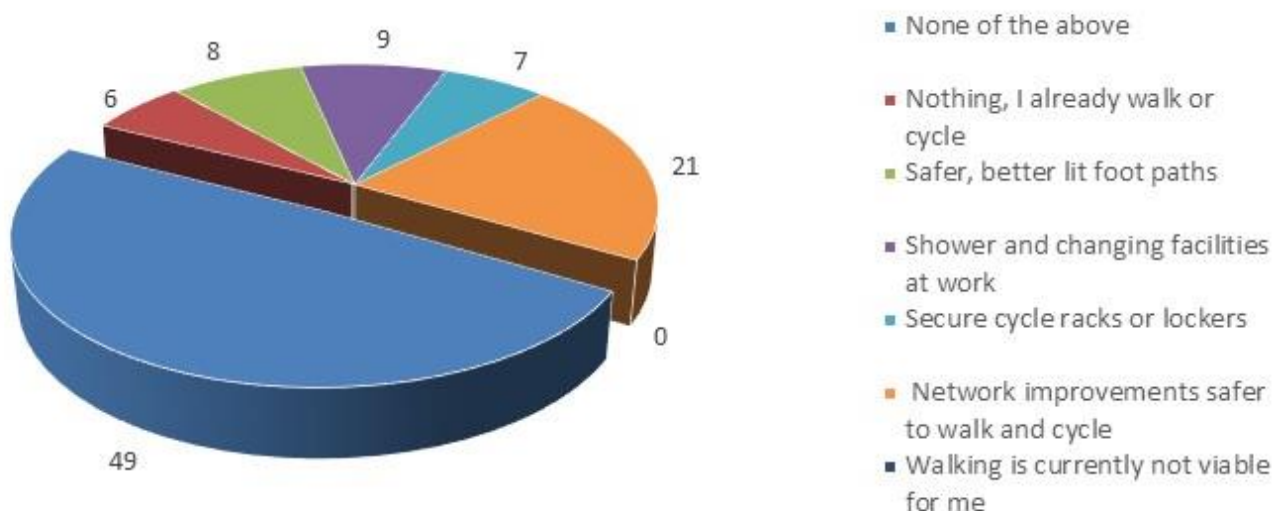
5.23 Overall, it can be concluded that car sharing is an option which if it could be incentivised through development of a safe operating model that matches people, place and route, has the potential to reduce single car occupancy by around 20%.

6 INCREASING TRAVEL MODE CHOICE

Measures to Encourage Walking and Cycling

- 6.1 Survey participants were asked to choose from a pre-defined list of options those which they were most agreeable with could convince them to travel by walking and cycling modes in the future. The question enabled multiple selections to be made and a total of 597 options were selected. Noting the total number of participants, this means that only a small proportion of participants felt strongly enough to select more than 1 option.
- 6.2 The results indicate that nearly half of all participants could not be convinced to walk or cycle (49%) as a primary commute mode to the park. This is a strong statement but is noted to that it does not include the effect of stringer incentivisation such as a reduction in parking provision or the introduction of parking charges.
- 6.3 21% of participants indicated that developing the parks walking and cycle network could incentivise future travel. Safer better lit cycling facilities and paths, provision of cycle welfare facilities within their businesses would all support travel by walking and cycling modes.
- 6.4 The results indicate that around half the staff employed within the park could be convinced to walk and cycle through provision of positive improvement. The results are shown graphically in Figure 16.

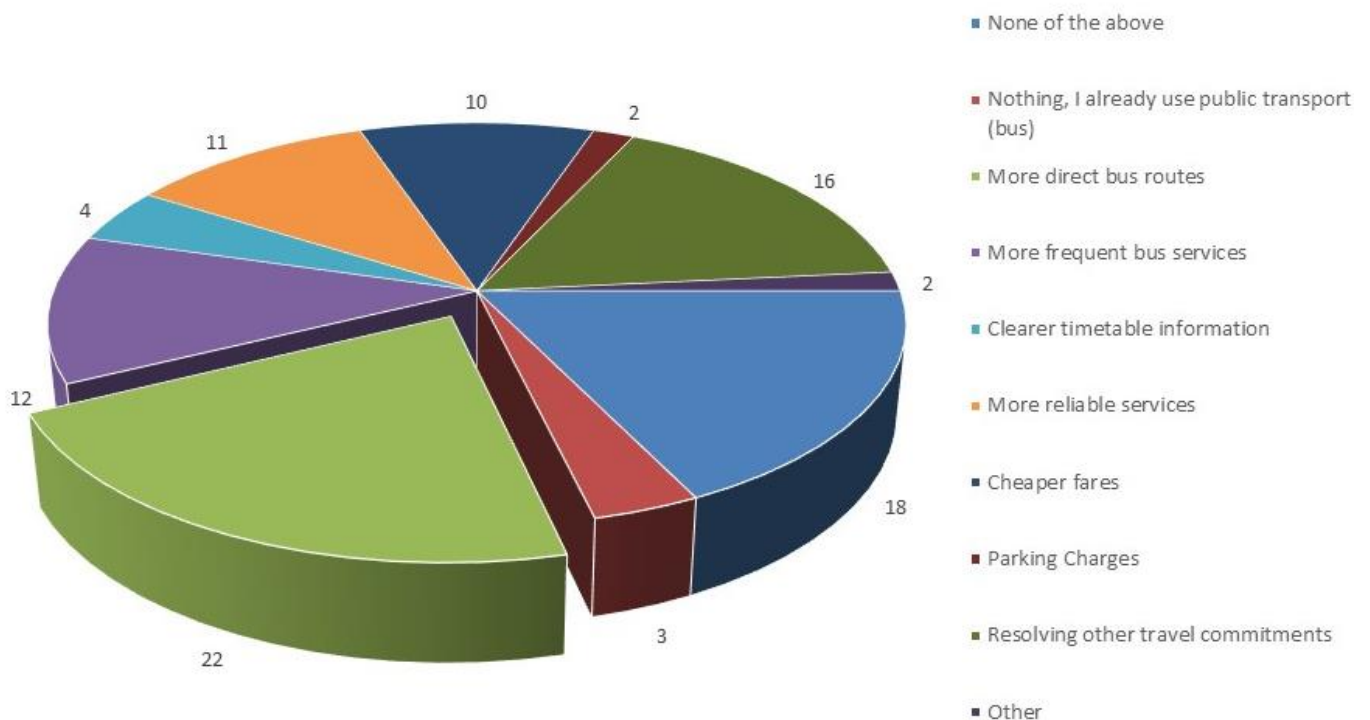
Figure 16 – Options to Encourage Walking and Cycling



Measures to Encourage Travel by Bus

- 6.5 Survey participants were asked to choose from a pre-defined list of options that best reflect their attitude to be being convinced to travel by bus in the future. The results indicate that provision of a more direct bus route would be a positive incentive (26%). 20% suggested that travel by bus could be incentivised if other onward travel impacts could be addressed. These are identified as wider network connectivity issues, which in reality may not be easy to address.
- 6.6 13% felt that the fares being charged were too expensive. More frequent services and a clearer timetable would encourage c.19% of participants to consider bus travel whilst 13% felt that the existing services are too unreliable. A total of 2% selected 'other' and provided comment.
- 6.7 Overall, even with a threat of parking charges being installed (4%), a significant portion of participants do not feel that the current bus services offered are effective, value for money, reliable or operate on an attractive / direct route to incentivise bus use as a primary travel mode into the park.
- 6.8 A total of 22% of participants do not think that bus travel could be incentivised.
- 6.9 The results are shown graphically in Figure 17.

Figure 17 – Options to Encourage Travel by Bus



6.10 Of the 2% responding 'Other' the following reasons were provided.

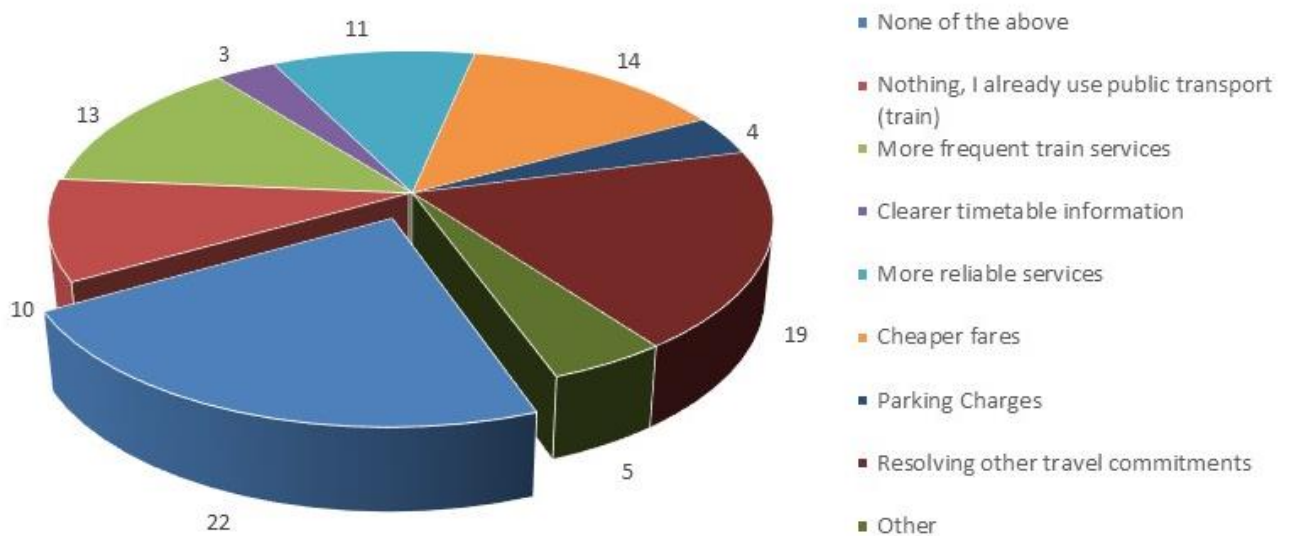
- Other Onward Commitments 25%
- Excessive Travel Distance 17%
- Personal Preference 8%
- Roads not safe Enough 8%
- Excessive Travel Time 17%
- Social Anxiety 8%

- No bus route 17%

Measures to Encourage Travel by Train

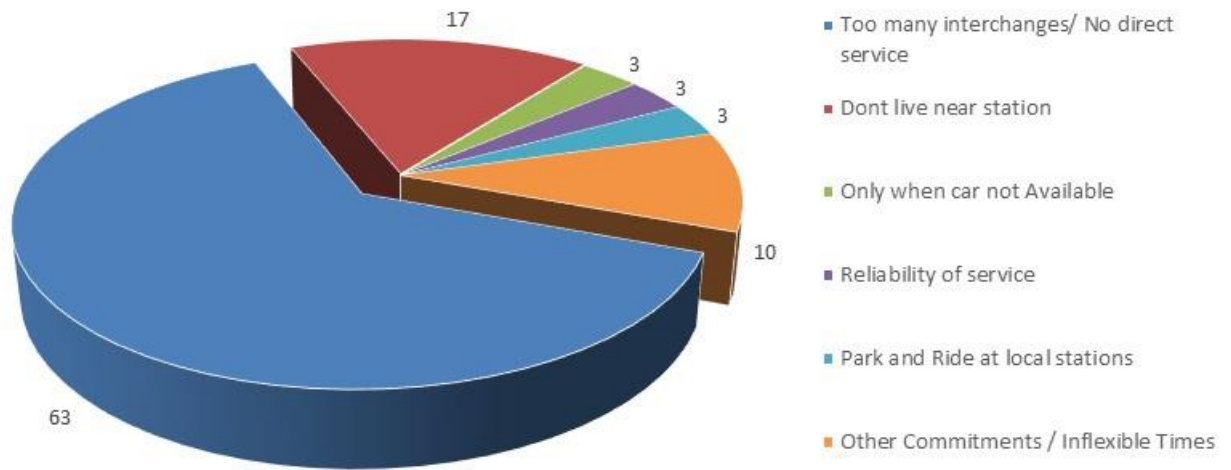
- 6.11 Survey participants were asked to choose from a pre-defined list of options that best reflect their attitude to be being convinced to travel by train in the future. The results indicate that 22% could not be convinced. 19% would be dependent upon resolving onward travel commitments. More frequent services and cheaper fares are the next most popular at 13% each. A total of 5 % selected other and provided additional reasoning.
- 6.12 Overall, even with a threat of parking charges being installed (4%), a significant portion of participants do not feel that the current train services offered are effective, value for money, reliable to incentivise train use as a primary travel mode into the park.
- 6.13 The results are shown graphically in Figure 18.

Figure 18 – Options to Encourage Travel by Train



- 6.14 Of the 5% of participants selecting 'other' the majority (63%) indicated that the lack of direct service, excessive number of interchanges was a primary influencing factor. 18% indicated that they did not live near a station with 10% indicating that other onward commitments or inflexible timetable were a barrier to travel by train. The results are shown graphically in Figure 19.

Figure 19 – Other Reasons to Incentivise Travel by Train



7 COMPARISON WITH 2013 SURVEY

Measures to Encourage Walking and Cycling

- 7.1 The 2013 Staff Travel Survey was undertaken in June 2013. The survey followed a similar configuration to the 2023 survey but was implemented within a smaller portion of the park and unsupported by a social media campaign. As a result, the 2013 survey only achieved 250 responses reflecting a 4% response rate.
- 7.2 Using the data from the 2013 survey a number of comparisons can be made that help understand how commuter travel habits have changed over the last 10 years.
- 7.3 The results of the comparison are shown in Table 2.

Table 2 – June 2013 vs. June 2023

Travel Mode	June 2013	June 2023	Difference
Car Drive (single occupancy)	68%	74%	6% increase
Car Share	4%	6%	2% increase
Bus	7%	2%	5% decrease
Rail	16%	10%	6% decrease
Walking	3%	2%	1% decrease
Cycling	1%	2%	1% increase
Other	0%	3%	3% increase

- 7.4 With reference to the comparison, the results indicate a worrying slide in the wrong direction. Overall, the number of single occupancy car journeys has increased, bus and rail use has significantly decreased. This may be due to a number of reasons noting the legacy impact of the COVID19 pandemic significantly disrupted staff working patterns and may have created the significant step change in travel behaviour.
- 7.5 On a positive note, the number of car shared journeys has increased and cycling journeys has also marginally increased.
- 7.6 Based on these results it is clear that further investment into the park is required to capture the parks sustainable travel potential.