How we monitor the progress of travel plans

In London there are two approved methods for carrying out travel plan monitoring. All full travel plans must use TRICS compliant monitoring surveys. All other travel plans and travel plan statements should have iTRACE compliant surveys.

A standardised approach across London is essential in order to ensure the collection of consistent and robust data which will enable local authority officers, TfL (where relevant), developers and occupiers to:

- Monitor progress in achieving a travel plan's targets and identify refinements to be made to a plan that is not on course for achieving these
- Assess the effectiveness of travel plans and the specific measures implemented as part of a travel plan for encouraging sustainable travel

Following a survey of the site, or at a frequency agreed within the travel plan, a monitoring report should be submitted to the local authority. This concise report should include a summary of any measures implemented, the survey results with comparison to previous surveys and travel plan targets, and an updated action plan including revised targets if necessary.

As well as enabling stakeholders to understand the progress of the travel plan, the collection of data as part of the travel plan process can also bring wider benefits. Travel plan monitoring can provide the local authority with data to inform their annual monitoring reports and to assist in monitoring borough-wide progress in achieving local objectives such as environmental targets.

While a travel plan would normally cover a five-year period, local authorities may request a longer period of monitoring. For example, it may be extended to 10 years, if they consider that there are significant traffic impacts associated with the development or if the development is to be phased over a longer period.

In cases where a site is being developed in phases, the baseline survey should occur at a time when a significant proportion of each phase is occupied and the trigger point should be agreed with the local authority and specified in the travel plan and section 106 agreement.

After the initial monitoring period specified in the section 106 agreement, organisations should be encouraged to continue monitoring on a voluntary basis every two years thereafter. For this reason it is essential that whoever has responsibility for monitoring compliance (normally the Travel Plan Coordinator) should be clearly identified in the travel plan at the outset.

There are two approved methods for monitoring travel plans in London:

iTRACE

iTRACE is an online tool that supports the development and monitoring of travel plans in London. It comprises two key elements:

- A range of tools including online site audits, online or paper-based employee travel surveys and travel plan templates which organisations may use to develop their travel plan. Use of these tools is not a mandatory requirement to achieve iTRACE compliance, although their use would help ensure this
- A travel plan project management application for use by local authority planning officers. This facility enables a range of key data related to individual sites (such as contact details, site description, baseline mode split and travel plan targets) with travel plans to be input into the iTRACE database by local authority officers. iTRACE generates automatic reminders at key milestones such as when surveys are required. This enables officers to monitor and keep track of the number, status and effectiveness of travel plans in their borough

The standard suite of reports available to borough officers includes a number of site specific reports which cover a variety of topics from project management aspects (eg 'inspections due') to performance monitoring aspects such as modal shift achievements.

The iTRACE standard travel survey is available online.

iTRACE compliancy means that the following activities must be undertaken as part of a travel plan:

- An iTRACE compliant baseline survey (usually within six months of first occupation or at 75% occupancy if end user is unknown, whichever is sooner) to establish the baseline modal split. For developments where the end occupier is known at application stage, iTRACE compliant surveys should be undertaken where possible (eg where a workforce from the same company exists at a different site) to inform the travel plan to be submitted as part of the planning application
- Periodic (normally at three and five years post implementation) iTRACE compliant monitoring surveys. This enables modal shift to be identified
- An organisation may wish to develop its own tailored questionnaire to meet the specific requirements of its site. This is acceptable as long as main mode data is

collected. The main mode of travel is the mode that the respondent uses for the longest distance on any journey leg. So, while respondents may be asked to provide information for all legs of their journey, and to record time spent travelling on each leg, this is not a prerequisite to ensure compliancy

- The answers to the main mode question should be used to identify the mode split for the site
- Other data collected might include:
  - Personal information such as home postcode, job type, nature of work and working hours
  - Reasons for choice of travel mode and barriers to travel by sustainable modes
  - Attitudinal information about measures which are likely to encourage a switch to sustainable alternatives
  - The amount of business travel undertaken during the working day and opportunities for switching to alternatives
- Surveys should ideally be undertaken at a similar time each year and in a 'neutral' month, avoiding school holidays

Surveys may be undertaken online or via hard copy, whichever is considered to be most appropriate for the nature of the organisation to ensure a good and representative response. Organisations should aim to achieve a response rate of at least 30% for baseline surveys, or at least be able to provide assurance to the local authority that the sample is representative if this response rate is not achieved.

TRICS

TRICS is the national standard system of trip generation and analysis in the UK and Ireland and contains over 6,500 directional transport surveys at over 110 types of development. It is recommended by TfL as the standard method of measuring the likely trips generated by new developments.

TRICS was founded and is owned by six County Councils in the south of England, collectively the TRICS Consortium. In 2014 the historic trip generation database for London, TRAVL, was merged with TRICS to enable access to a greater range of data for all users.

TRICS allows users to select and retrieve survey data recorded at comparative sites, and then to use this data to predict the number of trips that will be generated by a particular development proposal. This information is subsequently used to develop transport assessments which enable borough officers to understand the impact of proposed developments on the road and public transport network.

Individual site records contain a range of information including:

- Descriptive information on a site's local environment and surroundings, and the composition and functions of a site

- Its on-site and off-site parking facilities
- Hourly, directional multi-modal transport count results
- Mode share of site users

TRICS undertakes an annual data collection program and new transport surveys are added to the database every three months.

Inclusion of travel plan monitoring information in TRICS will enable future transport assessments to incorporate more accurate predictions. This may clarify the impact that a travel plan will have on trip generation when introduced as part of a development proposal, such as the influence of the specific travel plan measures on mode shift.

iTRACE or TRICS?

TRICS surveys are generally appropriate for larger or more complex sites, or other sites where the borough considers that the absolute numbers of vehicles coming on to a site may be as important as the mode split proportions.

All developments for which a full travel plan is required should have TRICS compliant monitoring surveys. We recommend that all other travel plans and travel plan statements have iTRACE compliant surveys.

In the planning stages it should be agreed whether monitoring should be iTRACE or TRICS compliant and this should be specified in the section 106 agreement or planning condition.