MANOR ROYAL BUSINESS DISTRICT

TRAVEL SURVEY RESULTS

TECHNICAL NOTE

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1 INTRODUCTION AND HEADLINES

1.1 INTRODUCTION

1.1.1 This technical note summarises the outcome of a travel survey of staff travel patterns within businesses across the Manor Royal Business Improvement District (BID) undertaken in 2024.

1.1.2 The Travel Survey was designed to help understand how employees in Manor Royal travel to work and what factors affect their travel choices.

1.1.3 The survey was conducted electronically using an online survey tool. 832 responses were received, of which 728 were fully complete. Based on experience of such surveys in a similar commercial estate setting, this is an outstanding response rate and demonstrates significant interest from within the BID.

1.1.4 This information is being used as part of the on-going objectives of the Manor Royal Business Improvement District (BID) to identify actions that may help to improve journeys to/from the estate for staff and visitors, as well as helping to reduce travel costs, and identify ways to tackle road safety concerns and localised congestion.

1.1.5 On-site promotion of the survey to employees of all estate occupiers was managed by Manor Royal BID through in person events and their existing communication and marketing channels prior to and during the survey period.

1.2 HEADLINE FINDINGS AND ACTIONS

1.2.1 While there is extensive, insightful feedback from respondents, as is presented in Section 2.0, the headline results are presented as follows which, subject to further discussion with the BID, are recommended to be actioned in due course.

1.2.2 Respondents Profile

⊙ 32% of respondents live within 5km of the park, a distance which offers the greatest propensity for staff to travel to work by active modes of transport. 58% of respondents live within 20km of the park, with many coming from local urban centres with public transport links. 42% of respondents are beyond a 20km catchment and are widely dispersed across the region.

⊙ 3% of respondents advised they have a mobility impairment which affects how they can travel to work. 80% of these respondents use a car to travel to work, either as a driver or passenger.

Action: A further review to be conducted on measures on existing public transport routes, where limitations exist and how public transport providers might better facilitate mobility impairments.

1.2.3 Travel Patterns

⊙ Whilst 43% of respondents work on-site 4 or more days a week, hybrid working is influencing travel patterns with, 24% of respondents working on-site three days a week, and 34% on-site two days a week or fewer.

- ◉ Tuesdays, Wednesdays and Thursdays are the most popular days for respondents to work on-site, with Tuesdays and Wednesdays being the most popular, with over 80% of respondents commuting to the estate on both days.

- ◉ Peak arrival and departure periods align with the typical commuter peaks between 08:00 - 09:00 and 17:00 - 18:00.

Action: As we are seeing in the industry, the concentration of demand mid-week is putting pressure on services on these days, increasing pressure on parking, and can cause operational and management challenges where offices are not well served at the beginning and end of the week.

To further spread the demand for attendance at Manor Royal across the week, incentives can be explored by Occupier businesses to encourage their staff to the office on Mondays and Fridays to reduce peak transport levels on Tuesdays and Wednesdays, including a review of services available within the estate (for example, in case these can focus on these days). This could be addressed through a revised estate-wide Travel Plan and Car Park Management Plan.

1.2.4   Travel Behaviour

- ◉ Most respondents drive alone to work with 67% choosing to travel by this mode. 16% of respondents travel by public transport for the main part of their journey to work. In terms of active travel, just over 7% of respondents cycle or walk/run to work.

- ◉ Reasons given for preferring to travel by car were the unavailability, inconvenience, unreliability and high cost of public transport and in contrast the convenience, comfort and affordability of the car, e.g. for carrying capacity, flexible arrival and departure times, site visits, and additional errands such as shopping, gym or carer duties.

- ◉ Connections to and from local railway stations were a particular issue for employees that add unacceptable cost and time to commutes.

- ◉ Car sharing is relatively low, partly because people like driving alone and don't want to be tied to specific times of travel, and partly because of lack of knowledge of who to car share with and potential benefits. However, a large portion of respondents indicated they would consider car sharing as an alternative option to their current mode of transport.

- ◉ Cycling to work is relatively low, largely because of the perceived dangers of cycling and lack of good cycle routes. However, 21% of respondents to the question, 'What other forms of transport would you consider using to travel to work?', indicated they would consider cycling.

Action: Review how car sharing is currently promoted and ways it can be incentivised and made easier.

Action: Create a 'cycling buddies' scheme to pair current commuter cyclists with those who want to cycle. The current cyclists will provide advice and support, e.g. route planning and bike/gear checks.

Action: Audit cycle routes and end of trip facilities in Manor Royal and develop a strategy to better promote their use.

Action: Working with operators, review local bus services (particularly those to/from major transport hubs such as Gatwick Airport) to explore options for improving speed, regularity, and reliability of services to strategic locations across Manor Royal.

Action: Explore options for bike hire/loans to facilitate local trips, e.g., between public transport hubs and Manor Royal.

1.2.5   Parking and congestion

- Most respondents did not see parking as an issue for them. However, it should be noted that some employers in Manor Royal have their own car parking for their workers. There were several suggestions that parking was unevenly distributed with some car parks underutilised at times when on-street parking was over capacity.

- Some specific issues around on street parking and congestion were highlighted, e.g. lots of motor vehicle movements causing congestion around The Gatwick School during school pick up and drop off. Also, holiday makers leaving their cars parked in Manor Royal long term, and vans and car dealership cars parked in spaces for long periods too.

- While most respondents were either neutral or in support of more on street parking enforcement, the majority did not support paying for this.

Action: Review on-street parking arrangements and conduct an options appraisal for increasing effective enforcement.

Action: Conduct a parking audit and engage occupiers to identify any potential for car parking to be redistributed to improve utilisation.

Action: Engage The Gatwick School to discuss travel planning and work with them to understand, and find solutions to, the issue of congestion around school drop off and pick up, which might include the staggering of drop-off and collection (we have worked with many schools to introduce this and which can significantly help reduce the typical peak hour school demand at the beginning and end of the day).

1.2.6   Supporting measures and future improvements

- The majority of respondents are not familiar with Move It or easitCRAWLEY, and 88% of respondents haven't used the easitCRAWLEY benefits.

- Quite a few respondents thought the public transport discounts were either not relevant to them (e.g. only usable on season tickets and on certain routes) or they felt they needed further discounts before tipping them from driving to public transport.

- Several respondents suggested the discounts were difficult to access and use.

- Respondents ranked suggested future improvements in order of importance and provided their own suggestions. Looking at both sets of answers there are some key areas for improvement:
  - Improve maintenance of roads, pavements and cycle paths
  - Increase availability/frequency/locations of bus services
  - New and improved crossings for people walking, wheeling and cycling
  - Better cycle routes
  - Improve junctions, road layouts, and markings to improve efficiency, increase safety and better control parking
  - Increase safety around the estate with better street lighting
  - Cheaper public transport

Action: Conduct a Healthy Streets Active Travel Assessment (similar to that adopted as part of the planning process throughout London Boroughs) to identify the perceived shortcomings in terms of physical limitations to active travel/public transport on the ground in/surrounding the BID and create a list of improvements to the street environment that will encourage more walking, wheeling and cycling in the area.

Action: Work with easit to review benefits and how they are promoted and accessed.

Action: Crawley's latest Local Cycling and Walking Investment Plan (LCWIP) identified improvements to several cycle routes around Manor Royal. Engage Crawley Borough Council to understand the timeline for improvements to be completed and what support Manor Royal BID can offer.

2   SURVEY RESULTS

2.1   SURVEY RESULTS

RESPONDENTS PROFILE

2.1.1   The travel survey received a total of 832 responses, of which 728 were fully complete, thus **Table 2-1** provides a summary of responses by business.

Table 2-1: Number of respondents per business

| Organisations	Responses	Proportion of total responses
The People's Partnership	237	28.49%
Viridien	91	10.94%
Elekta Ltd	77	9.25%
L3Harrris	76	9.13%
Thales UK	72	8.65%
Virgin Atlantic	72	8.65%
Rentokil Initial	37	4.45%
Metrobus	24	2.88%
Newrest	19	2.28%
Leo Cancer Care Ltd	14	1.68%
The Gatwick School	13	1.56%
Avensys	11	1.32%
Pharmacare Europe Ltd	11	1.32%
KC Controls UK LLP	10	1.20%
Frontier Pitts	9	1.08%
Crawley Borough Council	5	0.60%
IT Document Solutions	5	0.60%
Red Sky	4	0.48%
Blueleaf	3	0.36%
Manor Royal BID	3	0.36%
Tokyo Electron Europe	3	0.36%
Welland Medical	3	0.36%
B&CE Holdings Ltd	2	0.24%
Ibis Styles London Gatwick Airport Hotel	2	0.24%
SOS Systems Ltd	2	0.24%
Other	27	3.25%
Total	**832**	**100%**

2.1.2   The 'Other' organisations where respondents are from, include: AAR International, Albion Rye Associates, Allaero, ALM - Aircraft Leasing & Management, Body Health Gatwick, CAE Training & Services UK Ltd, CRE, Creative Technology, Easy4u, Fastsigns, Gatwick Diamond Business, Greenstar Cleaners Limited, InterMedia, Latcham, LIMPIO, Magus Wealth, Niton Equipment Limited, Radiometer Ltd, ROCMEP, Rossetts (UK) LTD, SIX, Southern Comms, Transvalair, TWO, Ultra Ice, WBC.

2.1.3   Respondents were asked to provide their home postcode to analyse the distance travelled to/from the estate. 702 respondents declared their postcode for analysis, with many declaring their full postcode. Where only the first half (postcode area and district only) was provided, this was still plotted using the central point for that district (e.g. BN1).

2.1.4   **Figure 2-1** and **Figure 2-2** combine the postcode locations of employees with their main mode of travel to Manor Royal. It should be noted that this data includes journeys where several modes were used, but only shows the main mode of the journey.

2.1.5   Over half of employee postcodes are within a 15km catchment of Manor Royal and are largely located in Crawley and the surrounding urban centres of Reigate, Redhill, Horley, East Grinstead, and Horsham as shown in **Figure 2-1**. Although there are public transport links within these urban areas, most employees drive to work with 65% within 15km, 58% within 5km, and 45% within 2km, travelling by car and driving alone.

2.1.6   A significant proportion (27%) of employees within 2km walk/run to work, and 15% of employees within 5km take public busses. Half of all the employees cycling to work come from postcodes located between 2km and 5km, although overall cycling levels are low.

Figure 2-1: Postcode locations combined with mode of transport used (local level)
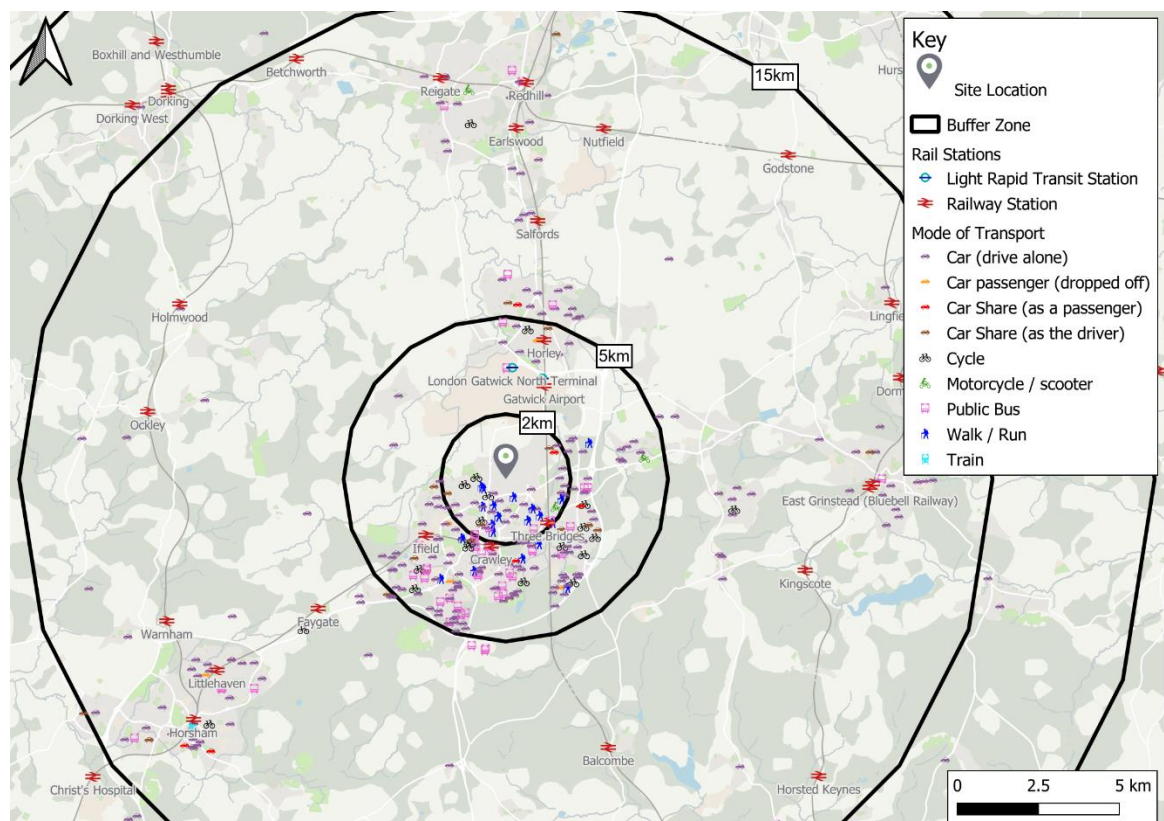
2.1.7 42% of respondents come from postcodes beyond a 20km catchment and are widely distributed along the south coast, in Greater London, and in surrounding counties.

2.1.8 The largest proportion of train use is from this group of respondents (93% of train travellers come from over 20km). However, most respondents with postcodes beyond 20km travel by car and drive alone (70%) as shown in **Figure 2-2**.

Figure 2-2: Postcode locations combined with mode of transport used (regional level)
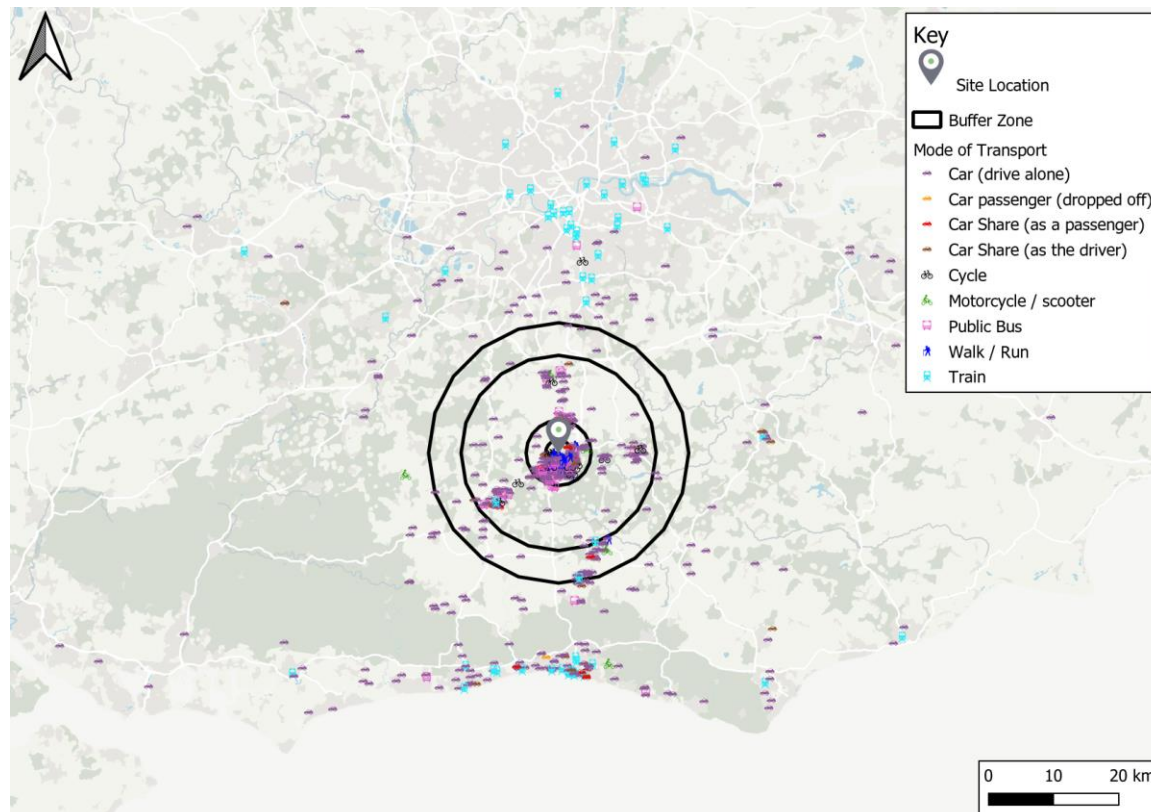
2.1.9 Of the 702 employees that provided a postcode, **Table 2-2** shows that 32% live within 5km of the park, i.e. a distance which offers the greatest propensity for staff to travel to work by active modes of transport. Furthermore, 58% of employees live within 20km of the park and are largely located in urban centres with public transport options and potential for increased car sharing. The other 42% of employees are beyond a 20km catchment and are widely dispersed across the region, some with good bus and rail connections and others in more rural locations poorly served by public transport.

Table 2-2: Distance between home and Manor Royal

| Distance Between Home and Manor Royal	Staff locations	
	Number (Incremental up to 20km)	**Percentage**
< 2km	51	7.2%
< 5km	227	32.3%
< 15km	361	51.4%
< 20km	410	58.4%
> 20km	292	41.6%
Total	**702**	**n/a**

2.1.10   **Figure 2-3** shows that 28 (3%) of respondents have mobility impairments which affect how they can travel to work.

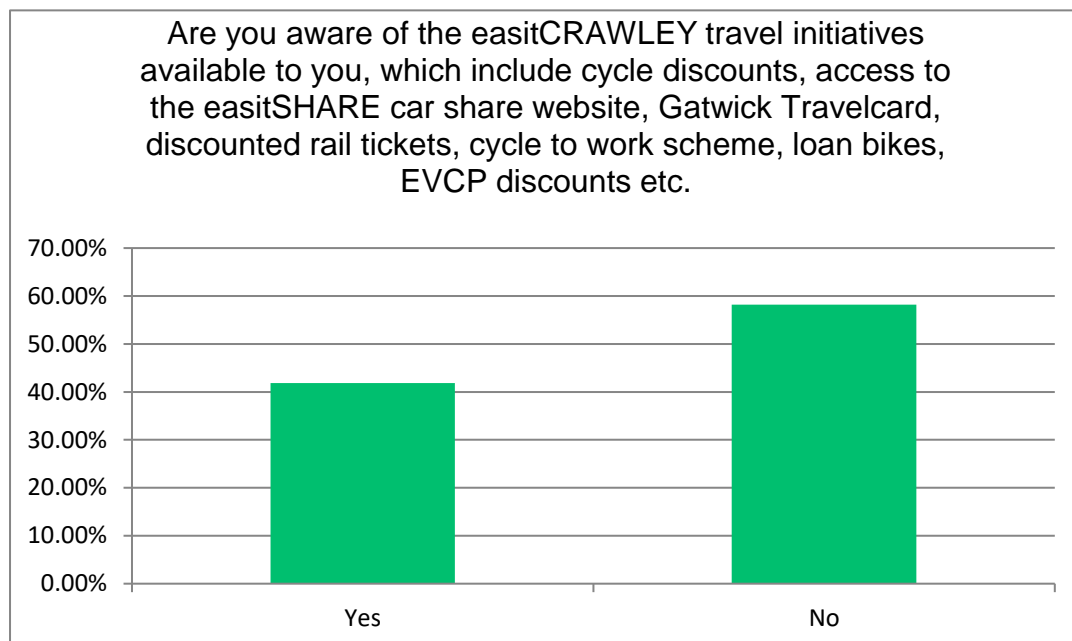**Figure 2-3: Number of people with mobility impairments who travel to Manor Royal**
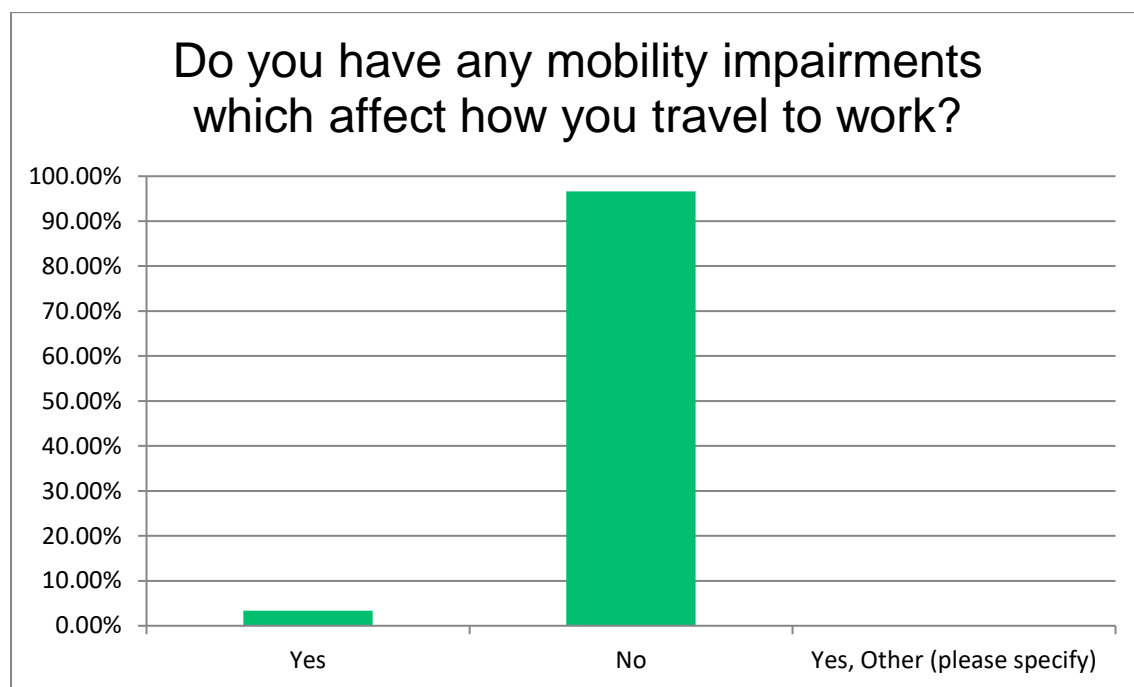
2.1.11 According to Motability, in the UK the transport accessibility gap currently stands at 38%, which means that disabled people (as defined under the Equality Act 2010) take 38% fewer trips than those without disabilities. This is a figure which has not changed for over a decade.

2.1.12 80% of respondents who indicated they had mobility impairments use a car to travel to work, either as a driver or passenger. This aligns with national trends and reflects the fact that people with mobility impairments come up against barriers when using public transport, e.g. according to Motability, in the UK 40% of disabled people often experience issues or difficulties when travelling by train and 1 in 4 disabled people say that negative attitudes from other passengers prevent them from using public transport.

2.1.13 Awareness of the Move It initiative is relatively low with 24% of respondents saying they knew of it, as shown in **Figure 2-4**.

Figure 2-4: Awareness of Move It

Figure 2-4: Awareness of Move It
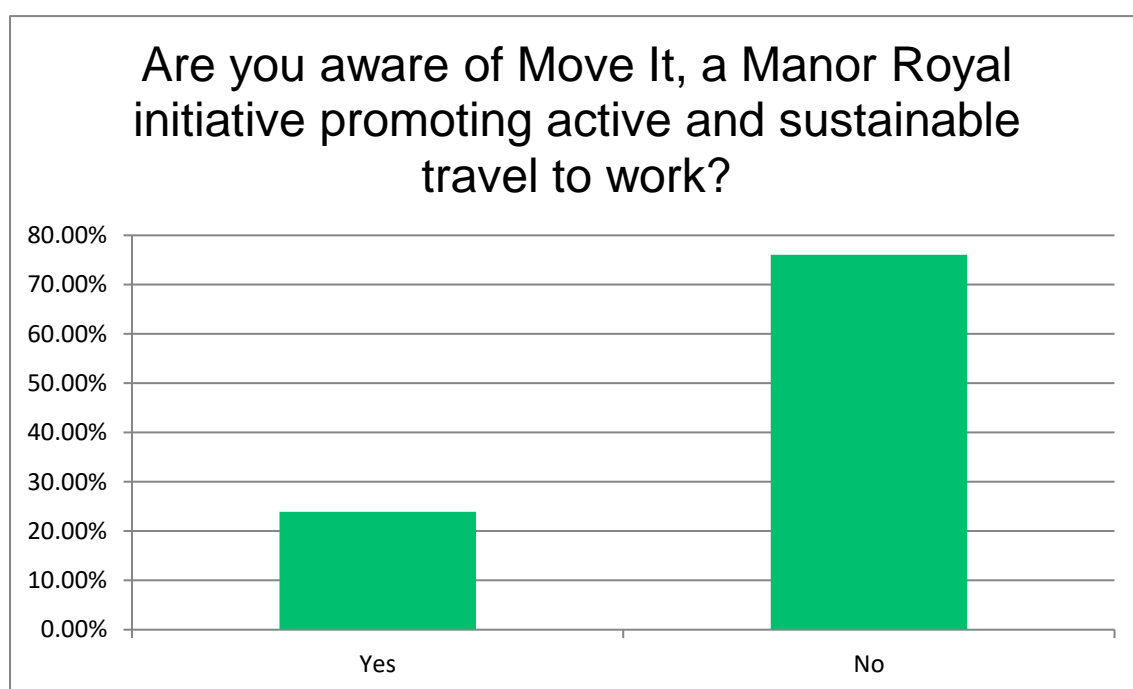
2.1.14 Awareness of easitCRAWLEY is greater, with 42% of respondents saying they knew of it. However, this is still less than half of respondents, as shown in **Figure 2-5.**

Are you aware of the easitCRAWLEY travel initiatives available to you, which include cycle discounts, access to the easitSHARE car share website, Gatwick Travelcard, discounted rail tickets, cycle to work scheme, loan bikes, EVCP discounts etc.
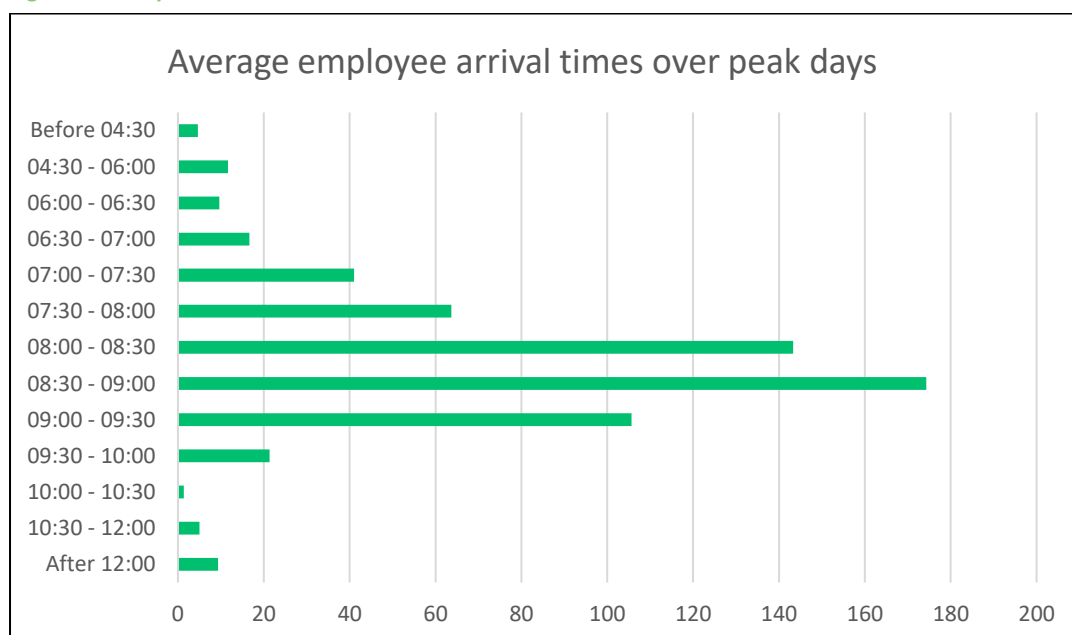

TRAVEL PATTERNS

2.1.15   **Figure 2-6** shows the average peak arrival times from the three busiest days of the week (Tuesday, Wednesday, Thursday) are between 08:00 and 09:30. The peak is between 08:30 and 09:00 with an average of 174 respondents arriving at this time.

Figure 2-6: Respondent arrival times

2.1.16   **Figure 2-7** shows there is a pronounced peak between 16:30 and 18:00, with the majority departing between 17:00 and 17:30. On average 163 respondents depart the office between 17:00 and 17:30.

2.1.17   Variation in arrival and departure times highlight there is flexibility in working arrangements, which may be due to childcare responsibilities or options to work from home for portions of the day.
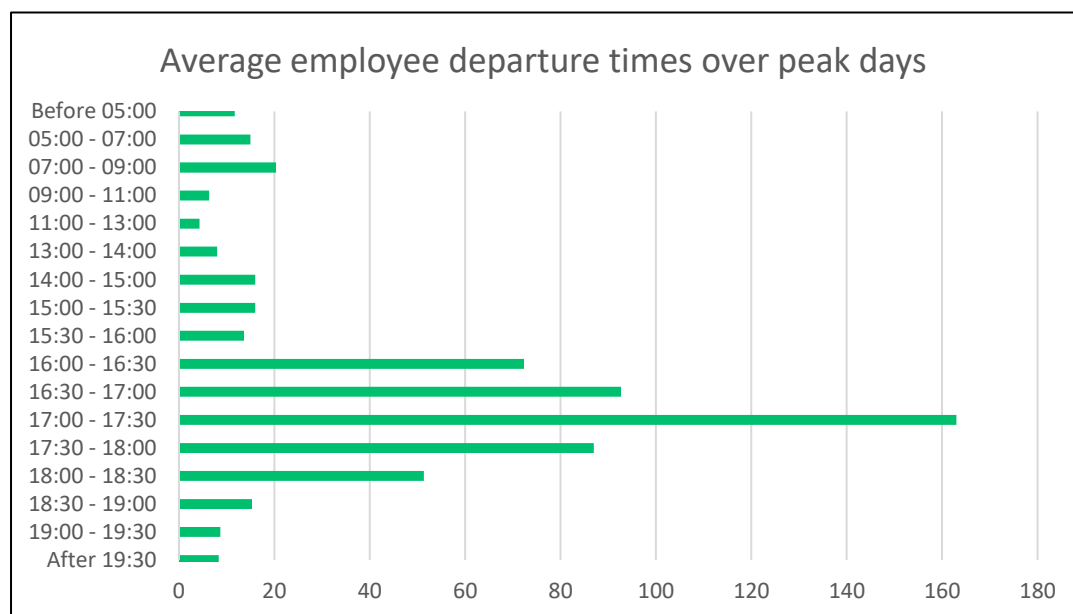
2.1.18   Overall, the results show a gradual return to pre-pandemic peak periods which align with the typical commute peaks between 08:00 - 09:00 and 17:00 - 18:00.

2.1.19   43% of respondents are on-site four days a week or more. A large portion follow a hybrid approach, with 24% working on-site three days a week and 34% on-site two days a week or fewer. **Figure 2-8** shows how many days per week respondents work from Manor Royal.

Figure 2-8: Frequency of working on-site
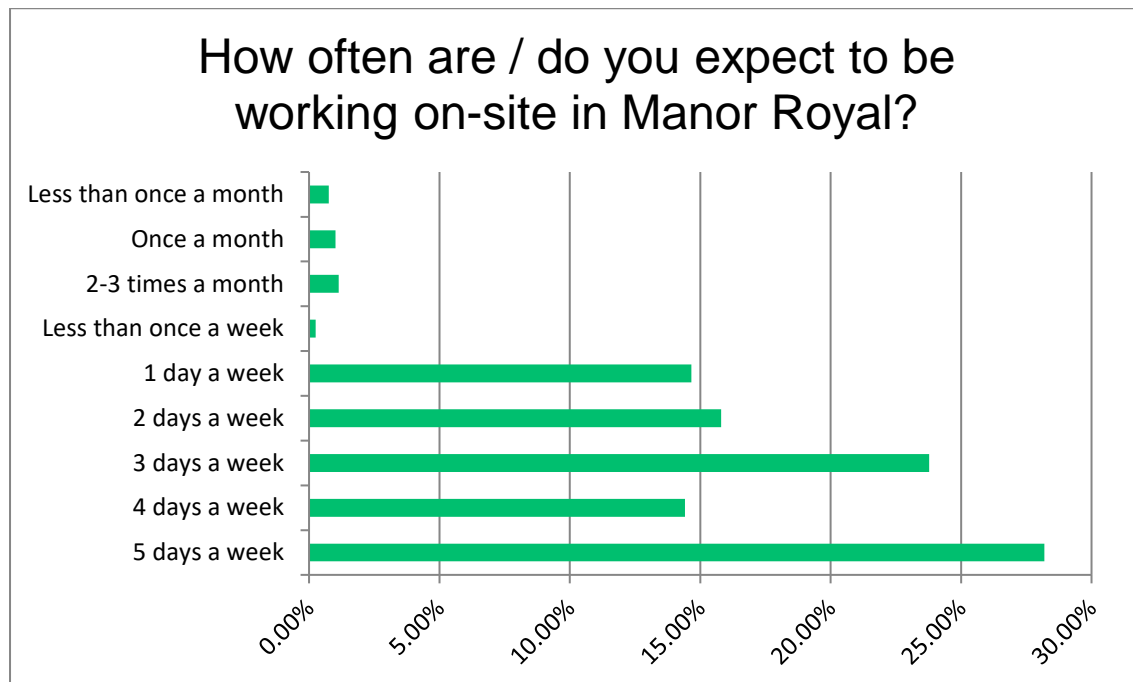
2.1.20   Respondents were asked which days of the week they would usually travel to Manor Royal. This was to analyse which days are expected to be busier in terms of travel to Manor Royal.

2.1.21   **Figure 2-9** shows what days of the week respondents usually travel to Manor Royal. It shows that Tuesdays and Wednesdays are the most popular days of the week to be on-site, with around 80% of respondents on-site on both days. Thursday is also a popular day, with around 70% of respondents heading in. Friday is the least popular weekday to be on-site, with only 44% of respondents saying that they travel to Manor Royal then, whilst Monday sees 63% of respondents travel in.

Figure 2-9: Which day(s) do you usually travel to work in Manor Royal?
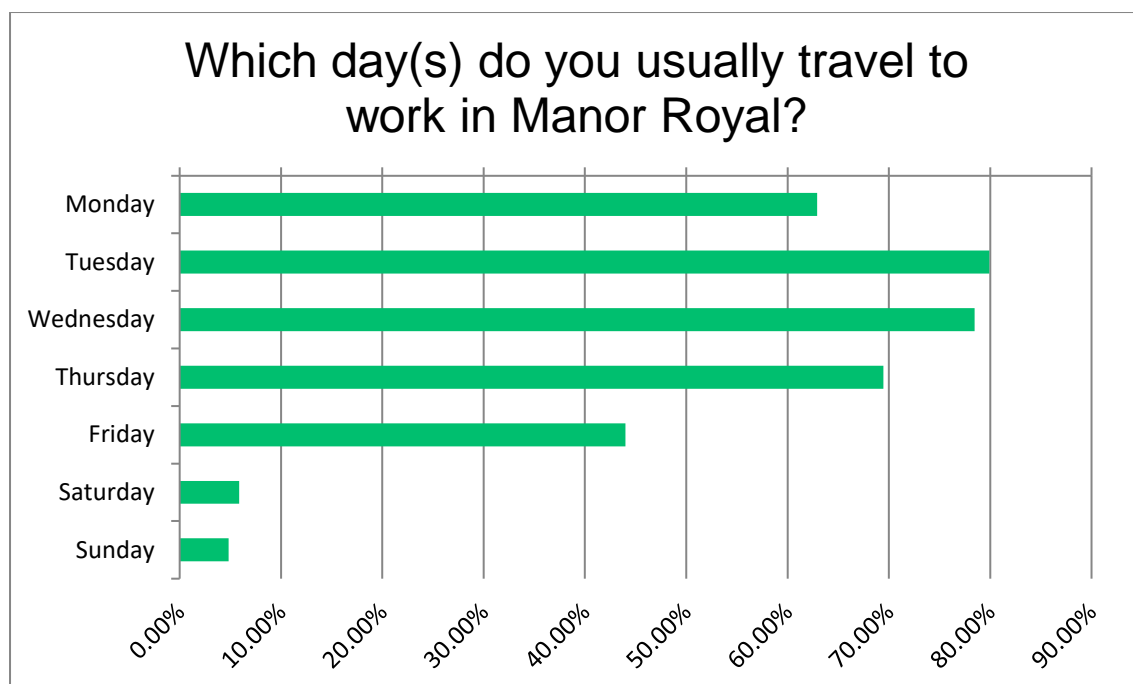
TRAVEL BEHAVIOUR

2.1.22   **Figure 2-10** shows the main mode of transport used by respondents to travel into Manor Royal. As expected, travel by car (drive alone) is the most popular mode of transport, with 67% (523 people) choosing to travel by this mode.

2.1.23   Over 16% of respondents have indicated that they travel by public transport for the main part of their journey to work, with 8% getting the train, and 8% getting a public bus. In terms of active travel, just over 7% of respondents (56) cycle or walk/run to work.

2.1.24   A number of respondents stated that they car share, with 4% car sharing as a driver, and 2% car sharing as a passenger. There are a small number (8) of respondents that are dropped off by drivers who work at places other than Manor Royal.

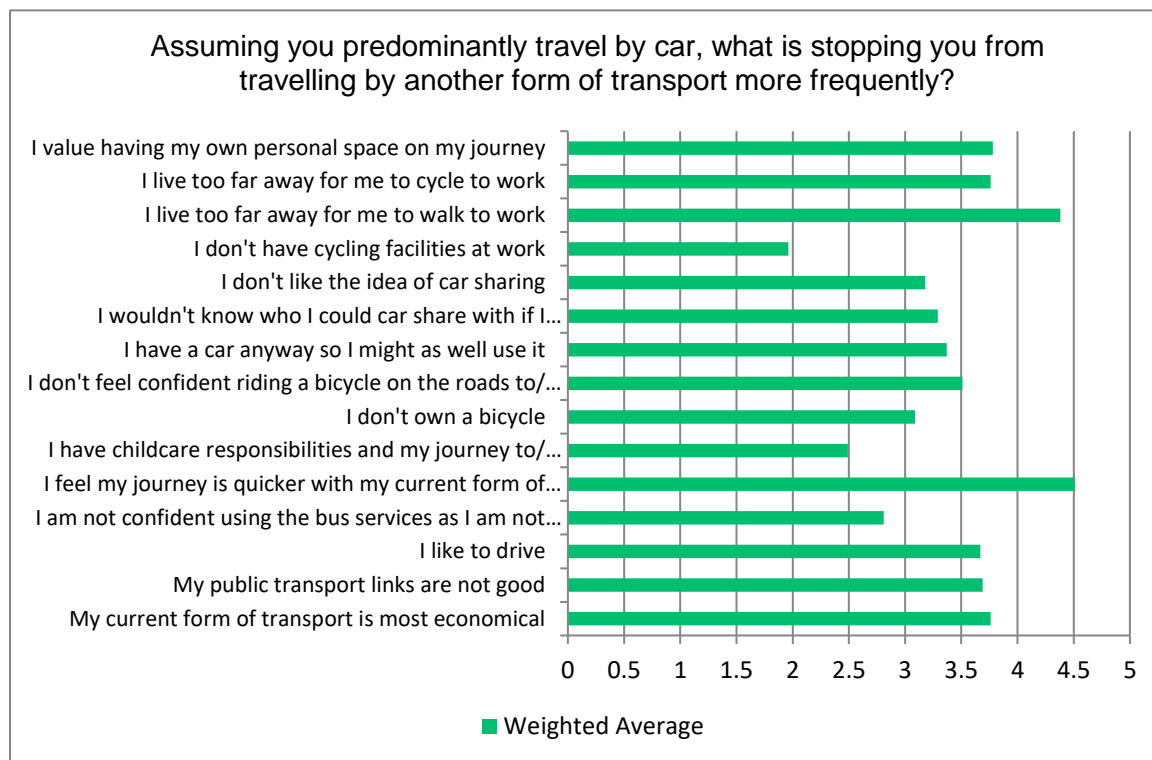## How do you commute to work on a typical day working at Manor Royal?
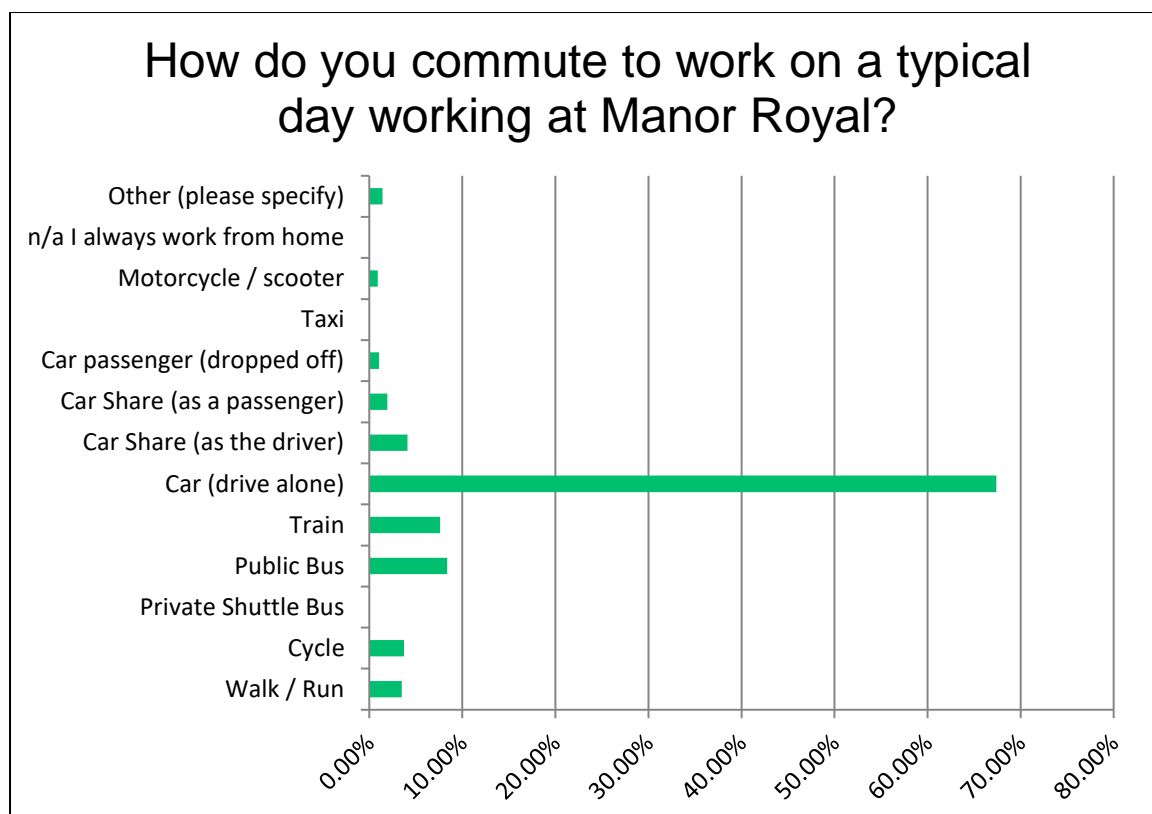
RESPONDENTS WHO COMMUTE BY CAR

2.1.25   Convenience, safety/comfort and the unavailability of convenient public transport were some of the most cited reasons for continuing to use a car as the main mode of transport. Many respondents live over 20km from Manor Royal 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. **Figure 2-11** shows the top reasons that stop people travelling to Manor Royal by alternative transport modes to a car.

2.1.26   225 respondents provided additional comments, which supported the key reasons given for not using alternative transport modes and highlighted some specific barriers. 44% of the comments highlighted the unavailability, inconvenience or unreliability of public transport. 32% pointed to the convenience of the car, e.g. for carrying capacity, flexible arrival and departure, site visits, and additional errands such as shopping, gym or carer duties.

2.1.27   23% referenced the higher cost of public transport as a barrier. 18% referenced the dangers and discomforts they associated with walking and cycling. Several people stated that car sharing was not an option for them as they either didn't live near other Manor Royal employees, or they didn't want to be tied into a set pattern of arrival and departure times. A handful of people also cited personal safety concerns or mobility impairments as barriers.

⊙   "… the roads out of the village are too dangerous at peak times to cycle on. Particularly in the winter."

⊙ "Public transport in the UK is generally poorly run and expensive. It can be good within a city or town but travelling between cities, towns and villages is often challenging. I would really love to get the bus to work or even better a train, but too much money is spent on car centric infrastructure. I am therefore forced to use my car unless I would like to double the duration of my commute and make it more expensive. This gives public transport a bad reputation which I think in turn creates a feedback cycle of more car use."

⊙ "I have occasionally used a combination of rail and bus to get to work when for example I don't want my car there after work but have found it takes nearly twice as long and costs three times as much, not to mention how much more inconvenient it is."

⊙ "I do not always travel at the same time as my meetings change so a car share would not be practical. I also often use my journey to the office to stop at Tesco for shopping or to get fuel."

⊙ "As a new driver who has taken public transport their entire life, I feel it's my turn to now have the flexibility and ease of using a car. Public transportation time doesn't just include the time when a vehicle is moving but includes times of waiting and getting to the locations of pick-up. A journey on paper may look like 40 mins but in actuality can sometimes be up to 2 hours or more, door to door. If I lived in Crawley, however, I would more than likely have walked, cycled, or used public transportation as it is easy around Crawley. It's worth thinking about the public transportation in neighbouring towns too as this will impact people's choices to want to use transportation in Crawley, as they still need to get here before then hopping on a bus or potentially carpooling closer. Even Gatwick and Ifield's train stations are miles away. Also, public transportation has become increasingly more and more expensive. Thinking about my journey from Horsham, … just the walk alone to a train station is double the amount of time using a car for the day. The total cost would be £28.30 a day. That is almost a full tank of petrol for my car for an entire week in one day. For my journey, public transportation would not only make me time-poor but economically worse off."

⊙ "I used to take the train to work – the issue is that Three Bridges is a 35-minute walk from the office, and my local train station is a 35-minute walk from my flat. All in, the total commute takes around 1hr 20m (2x 35m walks plus 10mins on train) and that's without factoring in any further delays on the train. Meanwhile, driving to work takes only 35 mins, and sometimes 45mins in heavy traffic."

⊙ "As a Forge Wood resident, the most problematic part of the journey is the bridge connecting Manor Royal and Forge Wood (at Greyhound). It is just super unsafe, and I don't feel safe even walking over it. I attempted to commute by bicycle a couple of times, but the experience was not good, mainly because of the link mentioned above (we are not speaking about weather as it is something we cannot fix). If Manor Royal can somehow push the Council to finance building a proper pedestrian/bicycle section of the bridge and the link connecting dedicated cycling routes in Forge Wood to the bridge, it would be great as there would be way less cars coming from Forge Wood residents. The pedestrian/bicycle section of the bridge would also make it way safer for kids to walk to Gatwick school"

Assuming you predominantly travel by car, what is stopping you from travelling by another form of transport more frequently?

RESPONDENTS WHO COMMUTE BY PUBLIC TRANSPORT

2.1.28   Respondents that travel by train were asked which stations they most frequently use, shown in **Figure 2-12**. The majority travel through Gatwick Airport Station, with smaller percentages travelling via Three Bridges and Crawley.

2.1.29   Whilst only 59 respondents stated that they travelled via train, **Figure 2-12 s**hows that 209 respondents stated which train station they most frequently use. This suggests that in some instances, train use may be higher. For example, there may be respondents who travel by car two days a week, and by train one day a week.

Figure 2-12: Travel by train
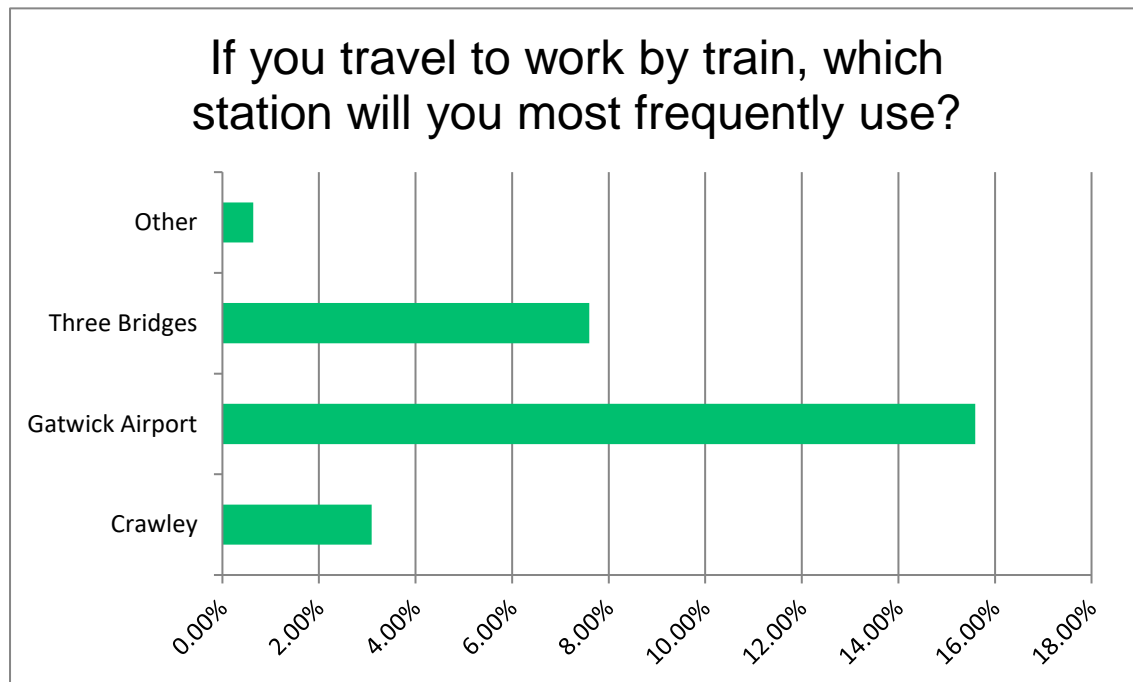
2.1.30   **Figure 2-13** below shows which bus services respondents use. The 10 service was the most popular service with 21% of respondents who travel by bus using this service (162 people). The 100 is also a popular service with 14% of respondents who travel by bus using this service, with the 200 and 20 being well utilised also. In the 'Other' category 4 people use the 273, 3 people use the 23, and 3 people use the 2.

2.1.31   Whilst only 65 respondents stated that they travelled via bus, **Figure 2-13 s**hows 583 responses. This suggests that in some instances, people are using multiple buses to travel to Manor Royal.

Figure 2-13: Travel by bus
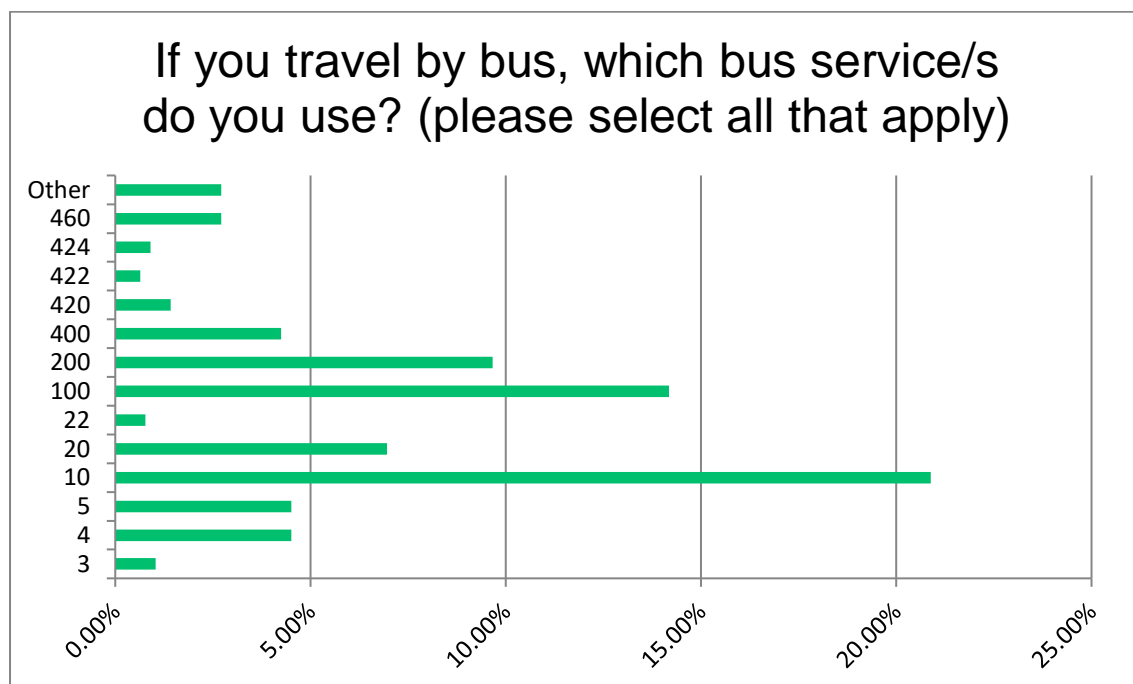
COMMUTING BY OTHER FORMS OF TRANSPORT

2.1.32   Respondents were asked what other forms of transport they would consider using for their commute. **Figure 2-14** shows that the majority of the 776 respondents who answered the question would consider driving alone (29%), closely followed by car sharing (28%) and bus (27%). 20% said they would consider using the train. In terms of active travel, 21% said they would consider cycling and 12% walking. A significant number of respondents stated they would not consider any other mode of transport (25%).

Figure 2-14: Other forms of transport employees would consider
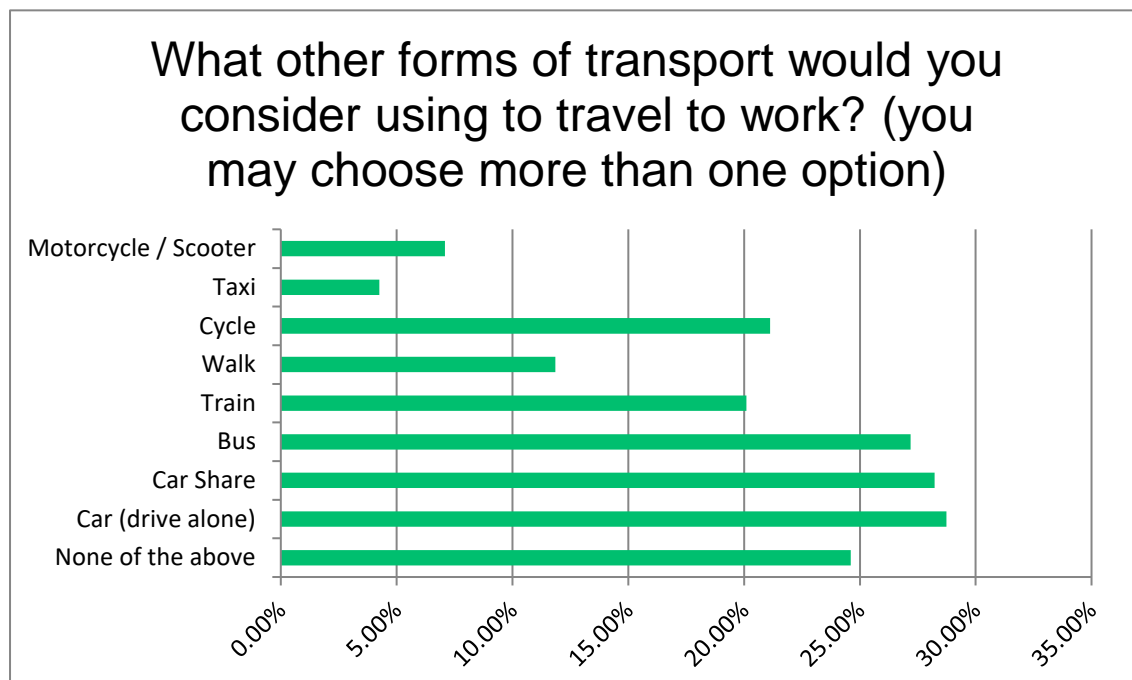
PARKING AND CONGESTION

2.1.33   **Figure 2-15** shows that the majority of the 776 respondents that answered question 12 of the survey feel that parking is not difficult for them, but views on whether congestion is a problem were more varied.

2.1.34   62% of respondents disagreed that parking was difficult for them in Manor Royal, with the majority strongly disagreeing. Only 15% agreed it was difficult.

2.1.35   The view on congestion was more evenly split. 35% thought it was not a problem for them while 37% said it was a problem. The majority of respondents neither agreed nor disagreed.

2.1.36   579 respondents already stated they either drive alone, car share or are dropped off by car and would likely have strong views on parking and congestion. Parking and congestion can also present issues for those taking public transport or walking, wheeling or cycling, e.g. congestion delays journeys and inconsiderately parked cars can block paths.

Figure 2-15: How much of a problem are parking and congestion for employees
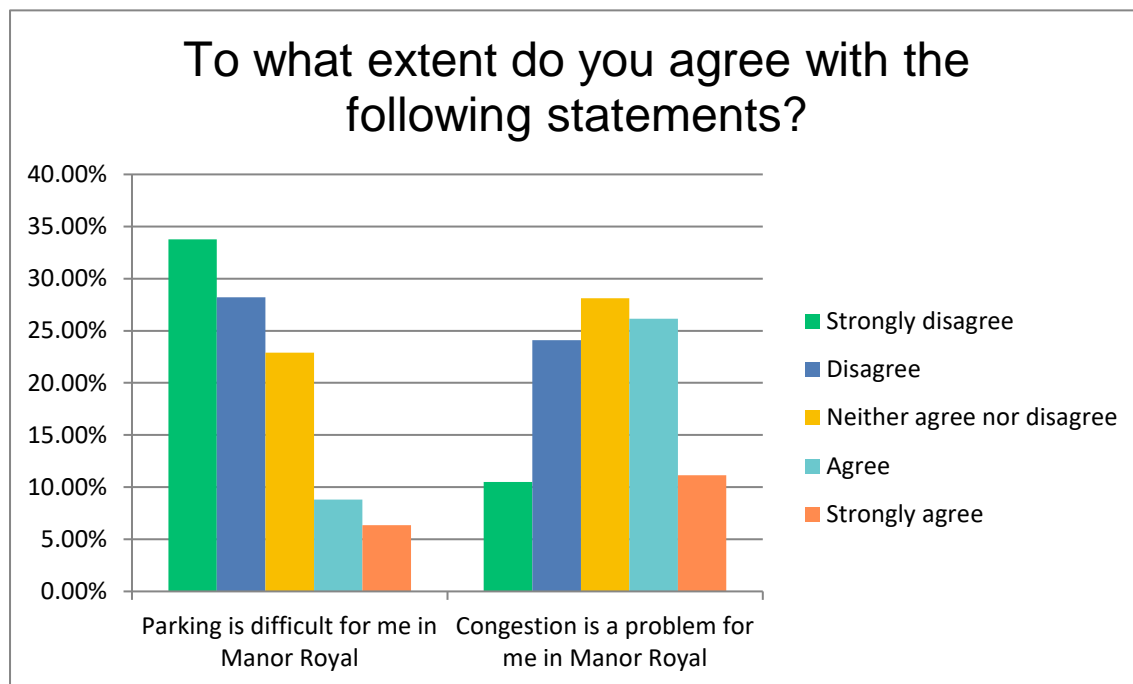
2.1.37   Several questions were used to explore issues around parking in Manor Royal in more detail. **Figure 2-16** shows that an overwhelming majority of respondents don't feel that parking is an issue that affects them personally.

Figure 2-16: Is parking an issue for you?

Figure 2-16: Is parking an issue for you?
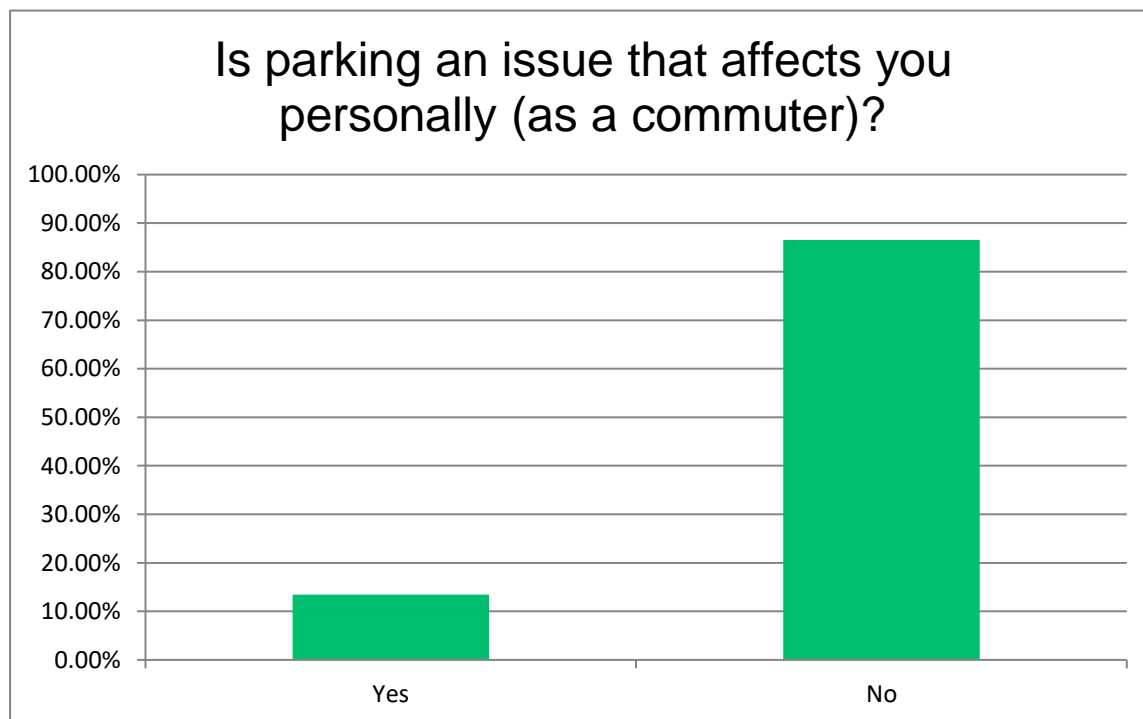
2.1.38 **Figure 2-17** shows a majority of respondents also felt that parking was not an issue for their business or customers (53%). However, a significant number said they didn't know if it was an issue (31%), while 16% (125 respondents) stated it was a problem.

Figure 2-17: Is parking an issue for your business or customers?
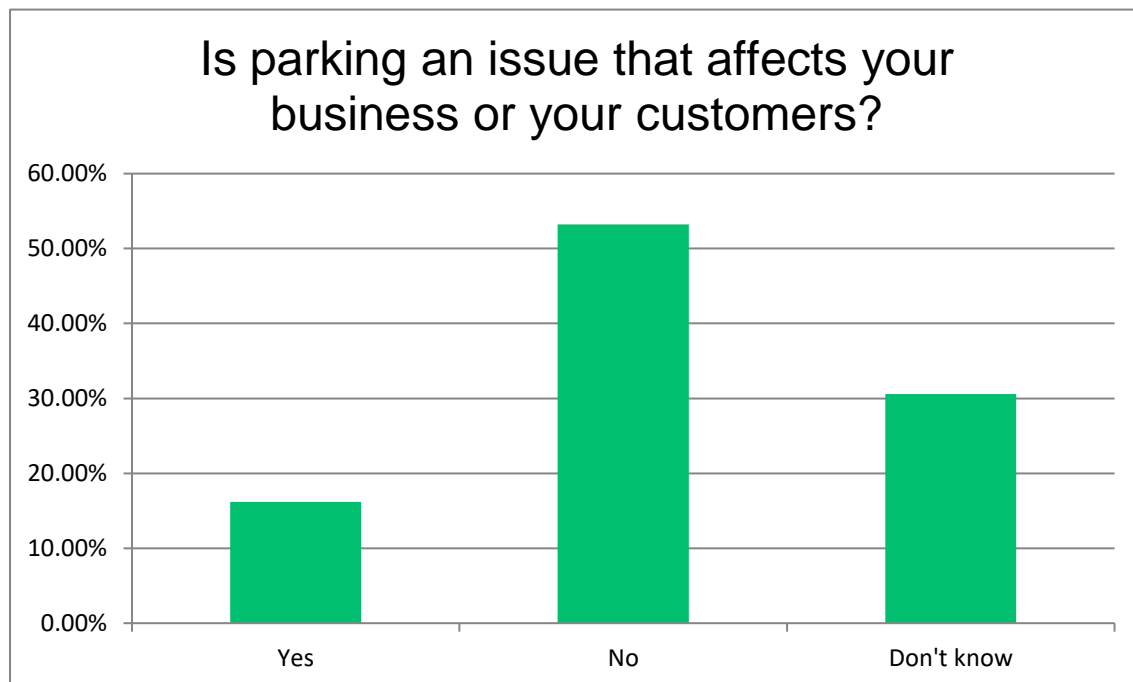
2.1.39 When asked if they would support proposals to manage on-street parking in Manor Royal, e.g. via a parking permit scheme, 32% of respondents said yes, they would. The majority of respondents said they didn't know (46%) and 22% said they wouldn't support it, as shown in **Figure 2-18**.

Figure 2-18: Support for proposals to manage on-street parking
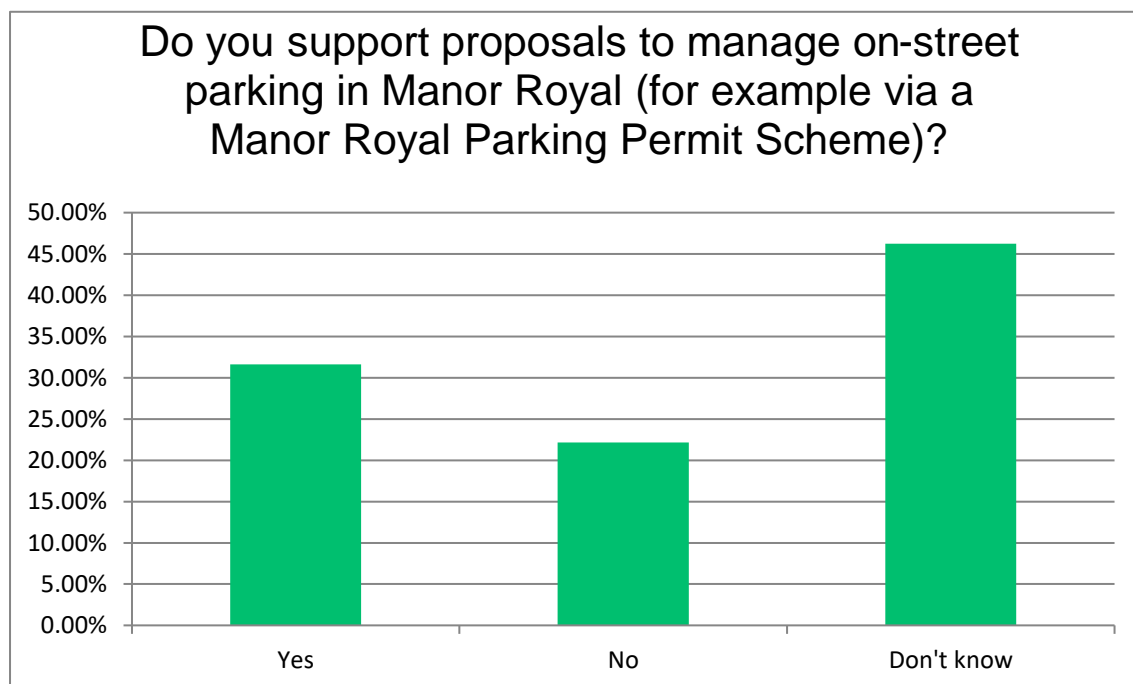
2.1.40 Asked if they would support proposals to pay to manage on-street parking, support dropped and a lower figure of just 13% said yes, they would. A large portion of respondents were undecided with 42% saying they didn't know, but the majority said they wouldn't support it (45%), as shown in **Figure 2-19**.

Figure 2-19: Support for paying for managing on-street parking
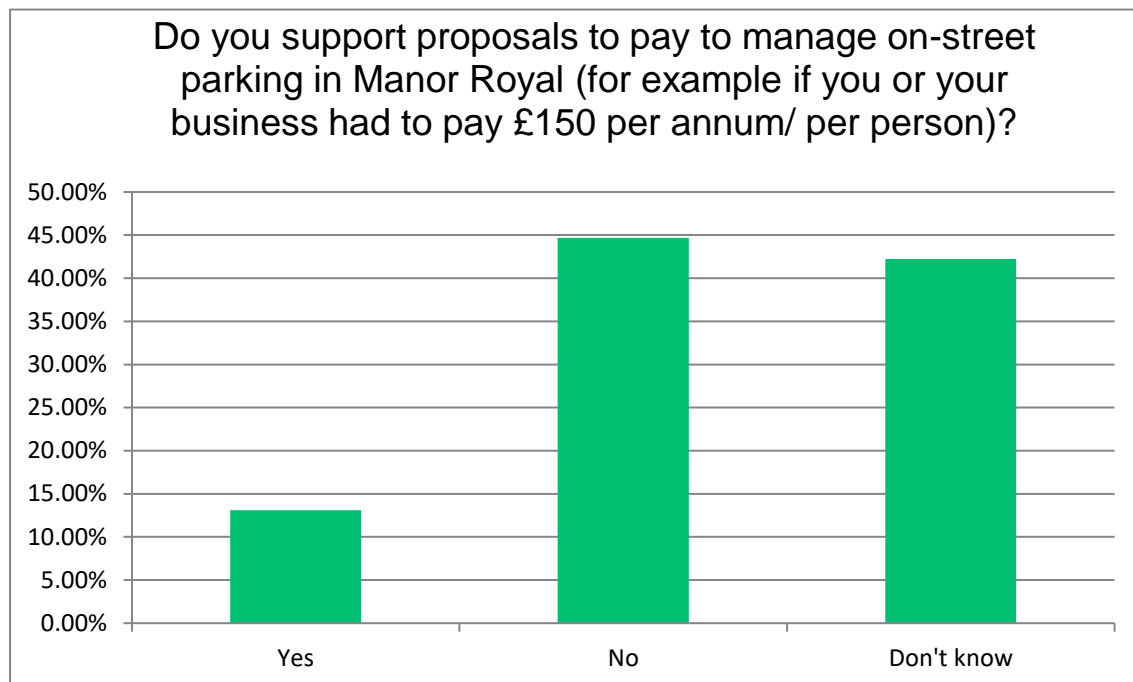

2.1.41 Respondents were asked for their comments, concerns and suggestions regarding parking in the estate. 127 respondents completed this question. This was an open-ended question and common themes centred around:

- ⊙ 31 respondents were happy with the current situation but the majority of these pointed out that their companies had their own car parks. Several respondents pointed out they had to start early to secure their parking spaces.

- ⊙ If your business doesn't have a car park, then often there isn't enough parking spaces. Some suggested multi-storeys or better use of underutilised spaces.

- ⊙ Safety and congestion issues arise from uncontrolled parking on-street, near junctions and across pavements and cycle paths.

- ⊙ More enforcement is needed to stop uncontrolled and unsociable parking on-street.

- ⊙ Cars parked by people accessing the airport or local school were highlighted as an issue. Also, vans and car dealership cars parked in spaces for long periods, as well as employees having to park in residential streets were identified as issues.

- ⊙ Paying for parking punishes those having to drive and can be a deterrent to businesses and customers coming to Manor Royal.

- ⊙ Support for park and ride facilities and measures that encourage active travel and use of public transport.

- ⊙ Some mentioned road quality deteriorating in Manor Royal.

SUPPORTING MEASURES

2.1.42   When asked near the start of the survey whether they were aware of easitCRAWLEY, 42% of respondents said they were. However, when asked whether they had used any of the benefits, 88% of respondents said they hadn't used any.

2.1.43   The number of respondents who have used the different benefits is broken down in **Figure 2-20.** The top three benefits used were 'Discounted Metrobus tickets' (35), '15% discount on Southern trains' (31), and 'Discounts with Halfords' (20).

Figure 2-20: Use of easitCRAWLEY benefits
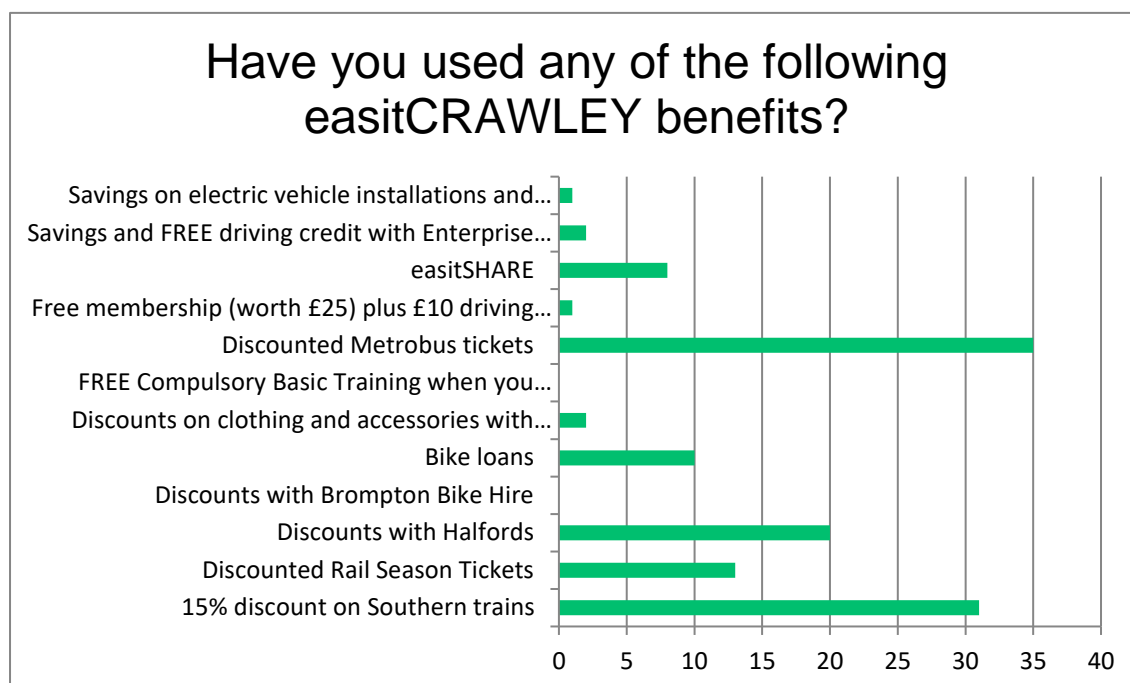
2.1.44   When asked why they hadn't used the easitCRAWLEY benefits, the majority of respondents either were not aware of them or thought they weren't relevant to them. While some respondents were interested and wanted more information on how to access the benefits, many thought the benefits weren't relevant to them either because they didn't live locally and didn't qualify, or they drove to work, and the benefits were for those taking public transport or cycling.

2.1.45   Several people thought the benefits didn't quite go far enough for them to switch from car to active travel or public transport, bus discounts didn't work with tap on and tap off systems, rail discounts were unavailable on their routes or were only advantageous for regular train travellers or season tickets holders and not aligned to current patterns of hybrid working.

2.1.46   Several people highlighted that they found accessing the benefits too complicated and would prefer a simpler system, e.g. benefits on a mobile app, or have the rail benefit selectable as a railcard so it can be accessed on all train apps.

2.1.47   Journey planners can help people make better, more informed transport choices. Some are more tailored to active travel users, others for rail users, and some for drivers. Respondents were asked about their level of familiarity with various journey planners. The results are shown in **Figure 2-21**.

2.1.48   Unsurprisingly, Google Maps was by far the most well-known and used journey planner, with 25% of respondents having heard of it, and 69% having heard of it and used it. The next four most used journey planners by respondents are all public transport specific: Trainline (50% of respondents), National Rail (48% of respondents), Metrobus (38% of respondents), and Southern (35% of respondents).

2.1.49   Driving specific journey planners were quite well used Waze (31% of respondents) and AA (21% of respondents).

2.1.50   Use of more active travel specific journey planners is lower: Strava (17%), Komoot (6%), and West Sussex cycle journey planner (2%). Moreover, the percentage of respondents who hadn't heard of the more specific active travel apps was very high: Strava (52%), Komoot (84%), and West Sussex cycle journey planner (91%).

Figure 2-21: Familiarity with journey planners
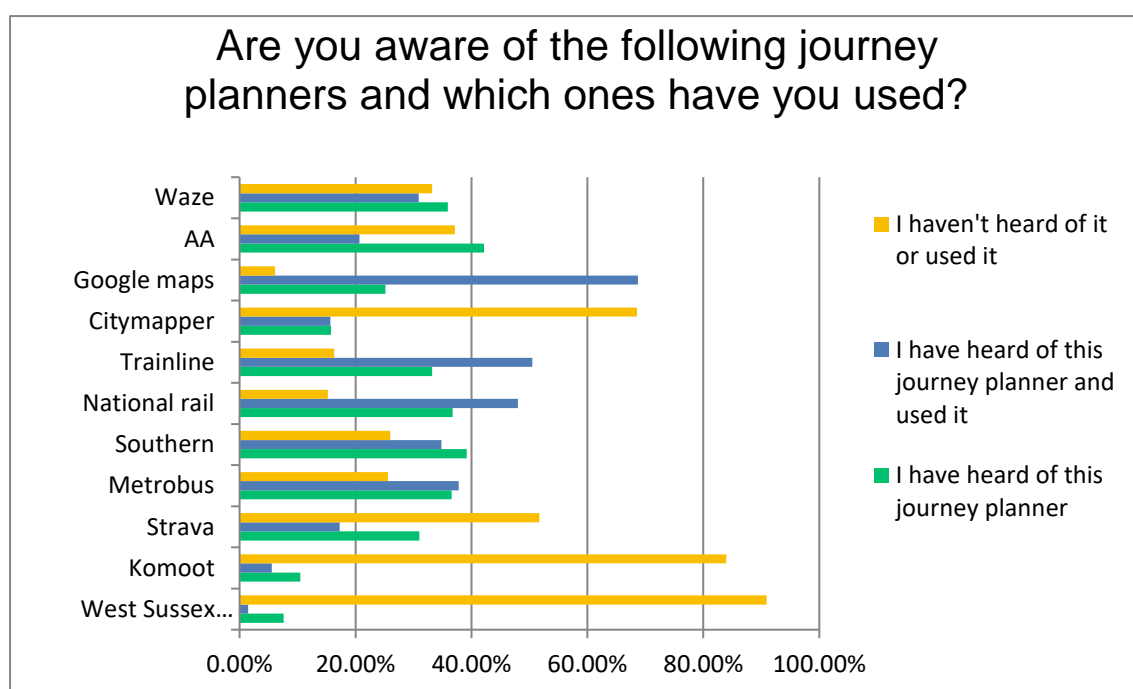
2.1.51   Other journey planners mentioned by respondents included Apple Maps, TomTom, Bus Checker, Maps.Me, Trainpal, and CycleStreets.

IMPROVEMENT MEASURES

2.1.52   Respondents were asked to rank potential future improvements to facilitate travel to/from the estate and on-site road safety in terms of how important they were to them from very important (1) to least important (5). **Table 2-3** shows the order of importance given by respondents to the various potential future improvements after weighted averages were calculated.

2.1.53   All suggested improvements scored relatively well with the weighted averages ranging from 1.99 to 2.95. 'Improve condition of pavements and cycleways' came out as most important, whilst 'cycle confidence training' was the lowest ranked improvement.

Table 2-3: Potential future improvements ranked in order of importance

POTENTIAL FUTURE IMPROVEMENT	WEIGHTED AVERAGE
Improve condition of pavements and cycleways	1.99
Improved road markings and signage to better control inappropriate parking	2.20
Improve safety/ lighting	2.21
Dedicated crossing points to enhance pedestrian accessibility	2.23
Improved wayfinding signs for pedestrians and cyclists	2.30
New starter travel information packs	2.49
Live travel information links on the Manor Royal BID website to be able to monitor the best time to leave each day	2.52
Introduction of dedicated on-carriageway or segregated marked cycleways	2.56
Advance cycle stop lines at traffic signals (allows cyclists to clear safely before vehicles)	2.63
Estate-wide Car Park Management Plan to better communicate and control inappropriate parking	2.67
Additional secure/covered cycle parking	2.70
Traffic calming measures to reduce vehicle speeds	2.77
Review potential for one-way routing on minor estate roads to reduce congestion and vehicle conflicts	2.86
A central EV charging hub	2.86
Cycle confidence training	2.95

OPEN ENDED RESPONSES

2.1.54 Respondents were asked whether they had any other suggestions for future improvements that would encourage them to travel sustainably or make their journeys easier or more comfortable. Common themes centred around:

- increased availability/frequency/locations of bus services (39 responses)
- cheaper public transport (8 responses)
- improvements to bus stops, e.g. live departure boards and shelters (3 responses)
- better maintenance of existing pavements and cycle paths (13 responses)
- more and better crossings that prioritise people walking, wheeling and cycling (5 responses)
- new and improved walking, wheeling and cycle routes (14 responses)
- Better lighting to improve safety (3 responses)
- repair road surfaces (17 responses)
- improved junctions, road layout and markings to increase efficiency and safety (19 responses)
- more parking enforcement, e.g. with cameras (6 responses)
- increase business engagement, promote discounts better, make discounts easy to access and use (5 responses)
- more electric vehicle charging points (2 responses)

2.1.55   A handful of other comments, which didn't repeat previous answers, included:

- ⊙ Is there any potential for centralised food waste processing that would allow waste food across Manor Royal to be converted to compost?

- ⊙ Tree and hedge chippings could be deposited in central bins and used as mulch across a number of sites. Alternatively, these chippings could be encouraged on the host sites as the mulch would improve moisture retention/ drought resilience, remove need for additional watering, save on disposal costs. Perhaps the Manor Royal partnership could get preferential rates via a local contractor

- ⊙ More litter picking and flower planting. Also, some more incentives for the wildlife in Manor Royal

- ⊙ Please factor in those with disabilities / hidden disabilities when putting together these questionnaires

- ⊙ Better lighting to improve safety

- ⊙ More food courts needed in area, or centralised canteen