

Development Management - Travel Plan Guidance

Introduction

These notes provide information on the main elements of the travel plan process for new development planning applications. In particular they provide information on:

1. When a travel plan is required as part of a development proposal;
2. What type of travel plan is required;
3. What a travel plan should include;
4. Example travel plan measures;
5. Information about travel plan monitoring and iTrace.

All new schools and some changes to schools will require a travel plan. This note does not cover these. Advice should be sought from the School Travel Plan Co-ordinator on (0191) 433 3109.

Queries in relation to workplace and residential travel plans should be directed to the Transport policy, research and development team on (0191) 433 3308.

What is a Travel Plan?

According to the DfT a travel plan “is a long-term management strategy for an occupier or site that seeks to deliver sustainable transport objectives through positive action and is articulated in a document that is regularly reviewed”. A travel plan is a living document that aims to increase sustainable travel, usually with an emphasis on reducing single occupancy car journeys. A travel plan should be continually updated and reviewed as monitoring takes place to reflect the changes in travel patterns to the site.

At the most simple level travel plans should include:

- information on the site location, including a full site assessment
- current travel and access information
- proposed improvements to be made as part of a development
- details of monitoring to be undertaken.

More detailed information is listed in section 3.

1. When is a travel plan required?

1.1 A travel plan is a requirement for all development proposals for which a Transport Assessment is required. For smaller schemes requiring a Transport Statement a more limited ‘Travel Statement’ is required. This has the same purpose as a travel plan, but it has a generally smaller scope.

1.2 Thresholds for the preparation of Travel Plans and Travel Statements are shown in table 1.

1.3 Lower thresholds should be considered in the following circumstances:

- in sensitive areas and locations. These include developments affecting the A1 (including those on Team Valley Trading Estate or at the Metro Centre), Gateshead town centre/Quays area and applications affecting traffic related air quality management areas; and
- where a travel plan would help address a particular local traffic problem associated with a planning application, which might otherwise have to be refused on local traffic grounds.

Table 1: Indicative thresholds for Travel Plans/Travel Statements

Land use	Use/description of development	Unit	Travel Statement Threshold	Travel Plan Threshold
A1 Food retail	Retail sale of food goods to the public – food superstores, supermarkets, convenience food stores.	GFA	>250<800 m ²	>800 m ²
A1 Non-food retail	Retail sale of non-food goods to the public; but includes sandwich bars – sandwiches or other cold food purchased and consumed off the premises, internet cafés.	GFA	>800<1500 m ²	>1500 m ²
A2 Financial and professional services	Financial services – banks, building societies and bureaux de change, professional services (other than health or medical services) – estate agents and employment agencies, other services – betting shops, principally where services are provided to visiting members of the public.	GFA	>1000<2500 m ²	>2500 m ²
A3 Restaurants and cafes	Restaurants and cafés – use for the sale of food for consumption on the premises, excludes internet cafés (now A1).	GFA	>300<2500 m ²	>2500 m ²
A4 Drinking establishments	Use as a public house, wine-bar or other drinking establishment.	GFA	>300<600 m ²	>600 m ²
A5 Hot food takeaway	Use for the sale of hot food for consumption on or off the premises.	GFA	>250<500 m ²	>500 m ²
B1 Business	(a) Offices other than in use within Class A2 (financial and professional services) (b) research and development – laboratories, studios (c) light industry	GFA	>1500<2500 m ²	>2500 m ²
B2 General industrial	General industry (other than classified as in B1), The former 'special industrial' use classes, B3 – B7, are now all encompassed in the B2 use class.	GFA	>2500<4000 m ²	>4000 m ²
B8 Storage or distribution	Storage or distribution centres – wholesale warehouses, distribution centres and repositories.	GFA	>3000<5000 m ²	>5000 m ²
C1 Hotels	Hotels, boarding houses and guest houses, development falls within this class if 'no significant element of care is provided'.	Bedrooms	>75<100	>100
C2 Residential institutions - hospitals, nursing homes	Used for the provision of residential accommodation and care to people in need of care.	Beds	>30<50	>50
C2 Residential institutions – residential education	Boarding schools and training centres.	Students	>50<150	>150
C2 Residential institutions – institutional hostels	Homeless shelters, accommodation for people with learning difficulties and people on probation.	Residents	>250<400	>400
C3 Dwelling Houses	Dwellings for individuals, families or not more than six people living together as a single household. Not more than six people living together includes – students or young people sharing a dwelling and small group homes for disabled or handicapped people living together in the community.	Dwelling unit	>50<80 units	>80 units
D1 Non residential Institutions	Medical and health services – clinics and health centres, crèches, day nurseries, day centres and consulting rooms (not attached to the	GFA	>500< 1000 m ²	>1000 m ²

Land use	Use/description of development	Unit	Travel Statement Threshold	Travel Plan Threshold
	consultant's or doctor's house), museums, public libraries, art galleries, exhibition halls, non-residential education and training centres, places of worship, religious instruction and church halls.			
D2 Assembly and leisure	Cinemas, dance and concert halls, sports halls, swimming baths, skating rinks, gymnasiums, bingo halls and casinos. other indoor and outdoor sports and leisure uses not involving motorised vehicles or firearms.	GFA	>500<1500 m ²	>1500 m ²
Car parks	Provision of new or additional car parking	Total spaces (including any existing)	>50<100	>100
Other	For example: stadium, retail warehouse clubs, amusement arcades, launderettes, petrol filling stations, taxi businesses, car/vehicle hire businesses and the selling and displaying of motor vehicles, nightclubs, theatres, hostels, builders' yards, garden centres, POs, travel and ticket agencies, hairdressers, funeral directors, hire shops, dry cleaners.	TBD	Determine on a case by case basis	Determine on a case by case basis

2. What type of travel plan is required?

2.1 There are a number of types of travel plans:

- Full Travel Plan
- Interim Travel Plan
- Framework Travel Plan
- Area Wide Travel Plan (for a defined geographic area)
- Travel Plan Statement

Full Travel Plan

2.2 Full travel plans are required for full planning applications where the proposed use and accessibility needs are known. Full travel plans will include clear outcomes, all relevant targets, and measures to ensure that these can be achieved as well as monitoring and management arrangements.

Interim Travel Plan

2.3 In some circumstances the future occupants of a development may not be known. The developer should prepare and submit an interim travel plan covering all substantive elements to be completed at an agreed time. The plan should include outcome targets for maximum allowable levels of car trips. It is accepted that some aspects of the travel plan and its measures may be provisional; nevertheless the interim travel plan should say when the full travel plan and monitoring will be completed.

Framework Travel Plan

2.4 Large mixed use developments with multiple occupants need a framework travel plan. This should set overall outcomes, indicators, monitoring and targets for the entire site. It should set out clearly that individual sites or occupants are required to prepare and implement their own subsidiary individual travel plans.

Area Wide Travel Plan

2.5 In some situations it is essential to consider an area wider than an individual site in order to bring about positive changes. This type of travel plan suits a major complex development. Similarly to framework travel plans, there are overall outcomes, indicators, monitoring and targets and individual organisations will be required to implement their own subsidiary individual travel plans to bring about the outcomes.

Travel Plan Statement

2.6 Travel plan statements should be prepared for smaller scale sites. While shorter than full travel plans there should still be information regarding measures to reduce single occupancy car use and promote sustainable transport. Monitoring should be undertaken but at a more simplistic level than full travel plans.

3. What a travel plan should include

Travel Plans

3.1 A Travel Plan should be a written document which includes:

1. An assessment of the site, including the transport links to the site, on-site facilities (for example car parking, cycle parking etc) any transport issues and problems, barriers to non-car use and possible improvements to encourage walking, cycling and public transport bus (and metro and train where relevant) use. It should include maps and/or plans.
2. The results from an initial survey of travel patterns of people those using the development (staff, visitors, residents) travel.
3. Clearly defined objectives, indicators and targets.
4. Details of proposed measures to address the objectives.
5. Detailed timetable for implementing measures.
6. Clearly defined senior management and staff responsibilities and roles, staff (and if applicable, union) participation. The contact details for the site Travel Plan Co-ordinator should be included.
7. A plan for monitoring and reviewing the effectiveness of the travel plan.
8. Proposals for maintaining momentum and publicising success.

Travel Statements

3.2 A Travel Statement should follow the same overall format as a Travel Plan. However the level of detail required should be reduced. In particular for smaller scale development it is unlikely to be practical to require the same level of commitment in terms of ongoing monitoring and development (items 6, 7 and 8 above). The scale of measures and level of monitoring should be a lighter touch and scaled to the location.

3.3 Travel Statements for very small developments there could be little more than an assessment of the site and the need/opportunities to improve conditions for sustainable travel and the provision of information to staff/visitors/residents.

4. Examples of travel plan measures

4.1 Measures that are included within a travel plan should relate to the specific location of the development, and also be proportionate to the scale of the development and any problems which require specific mitigation.

4.2 Measures to reduce the need to travel include:

- alternative working practices (e.g. flexitime, tele-working, home working, video-conferencing, compressed working week – 9 day fortnight);
- local recruitment of staff;
- local sourcing of raw materials/produce;
- provision of on-site facilities (for shopping, eating, etc.);
- home delivery of products;
- co-ordination of deliveries;
- fleet management;

4.3 Measures to reduce car usage include:

- site location, layout and design to encourage and provide for sustainable options;
- car parking restraint and management;
- introduction of (or use of existing) car clubs, including car club station/parking spaces;
- promotion of car sharing for employees (by using a car sharing website or setting up a local database of members, providing a guaranteed ride home in emergencies and offering priority parking for car sharers) (see sharesmarter.co.uk for more information);
- use of pooled company cars, vans and taxis;
- offering financial incentives for not driving to work/giving up parking space/car sharing;
- establishing No Car Zones;
- introduction of site car parking charges;

4.4 Measures to promote public transport include:

- on site layout for public transport stops (shelters, raised kerbs and real time passenger information);
- public transport penetration of the site;
- enhanced public transport waiting facilities integrated with development (e.g. bus “lounges” in reception areas/ lobbies incorporating real time information);
- new or enhanced public transport services to the site;
- direct convenient and attractive pedestrian links to public transport entry points (ideally not more than 250m in length, 400m maximum);
- introduction of shuttle services to local public transport interchange, rail station or park & ride site facilities;
- pedestrian links to public transport stops to be at least as convenient and attractive as pedestrian links to car park;
- site specific public transport information (maps, leaflets, etc.);
- promotion of personalised journey planner;
- dissemination of Metro, bus and rail promotion and assistance initiatives;
- discounted ticketing;
- season ticket loans;
- travel pass schemes.

4.5 Measures to promote walking include:

- direct convenient and attractive pedestrian routes to local facilities (ideally more convenient to use than route by car);

- site layout to be designed to maximise and encourage walking options;
- 20mph Home Zones and traffic calming measures;
- information provided on health benefits of walking;
- advice on personal safety;
- incentives for walking regularly; and
- maps and information about websites showing walking routes to the site

4.6 Measures to promote cycling include:

- site layout designed to maximise and encourage cycling (ideally more convenient to use than route than by car)
- cycle friendly traffic calming measures and 20mph/ Home Zones;
- convenient links to any local cycle route network and surrounding roads (if the site is a 20mph zone cyclists will use the road network, although cycle paths that provide a short cuts should be included)
- secure, convenient, weatherproof and well-designed cycle parking facilities;
- changing, shower, drying and luggage locker facilities at workplaces;
- financial incentives (e.g. mileage allowance for work trip cycle use, Bike to Work cycle purchase or salary sacrifice schemes)
- maps showing cycle routes around the site; and
- providing information on Department for Transport promotion of cycling and other initiatives (e.g. Bike Buddies/ local cycle route network information, cycle training for adults);
- high profile cycle events and promotion.

4.7 Measures to promote and market a travel plan include:

- travel plan measures included in organisation's own marketing material (e.g. welcome packs at residential sites, employment packs at the workplace, sales details and staff inductions, notice boards, leaflet drops etc.);
- website to promote/ market travel plan measures and;
- joint incentives with other local organisations/community groups to promote the wider community, economic and health benefits of travel plan measures.

5. Travel Plan monitoring and iTrace

5.1 Provision for monitoring of Travel Plans should be as simple and unambiguous as possible. It should relate directly to targets set in the travel plan. There should be clarity about:

- what is to be monitored. This will usually be mode share for the main users of any development. In some cases it may be more practical to monitor related factors (e.g. traffic generation);
- how often monitoring is to take place. Initially this is likely to be annually. In the longer term a 3-5 year period for monitoring is likely to be appropriate.

5.2 In cases where initial conditions are not known and cannot be predicted with any confidence it may be appropriate to provide also for baseline surveys following initial occupation of the development to allow the setting of sensible targets.

5.3 As a Travel Plan is a continuing commitment there will not normally be an end date to any monitoring. For residential development this may be difficult to achieve in practice and so an end date (of 5 or 10 years following completion) may be appropriate.

5.4 iTrace is a Travel Plan monitoring system that helps the travel plan coordinator develop and monitor their Travel Plan. The Council has access to iTrace and can

arrange a login for its use. Contact the Transport Policy, Research and Development Team on (0191) 433 3308 for more information.