



GLOUCESTERSHIRE TRAVEL NEEDS SURVEY 2021

Headline Results – Whole County

Transport Planning Team



Background



The Gloucestershire Community Rail Partnership (GCRP) was founded in 2020 as a Community Interest Company (CIC) and is one of the latest to get on board with community engagement and action. Whilst this has been against a backdrop of uncertain and challenging circumstances for the industry and public confidence in public transport more generally, the evolution of the CRP will benefit stakeholders by taking a strategic and proactive role in community engagement, empowerment, and participation to build renewed interest and enthusiasm for connecting communities.

The GCRP covers the whole of Gloucestershire and all the different stations across the county. These cover larger conurbation such as Cheltenham, along a major north south rail axis, to Stroud, a key tourism hotspot and commuter settlement along the east-west axis between South Wales and London. Equally important are smaller market towns, such as Moreton-in-Marsh, along the Cotswold Line from Hereford to Oxford, and Lydney, gateway to the Forest of Dean along the shores of the River Severn. Gloucestershire and its railway stations are incredibly diverse.

Understanding Travel Needs

Rail travel in Gloucestershire has grown incrementally over a number of decades. Prior to the outbreak of COVID-19, more people were travelling by rail than ever before. However, the number of people travelling by rail dropped dramatically during 2020 in response to government social-distancing and lockdown measures. Greater levels of flexible and home working practices have had a seismic impact on commuting levels.

A travel survey, developed by GCRP, has been conducted to help understand peoples attitudes and perceptions of sustainable travel and how the COVID-19 pandemic would shape future travel choices. This involved reaching out to partner institutions and local organisations across Gloucestershire as well as individuals who live, work, or visit the county. The aim is to capture a state of the county’s view of rail and how the industry could channel efforts to entice people back to travelling by train.

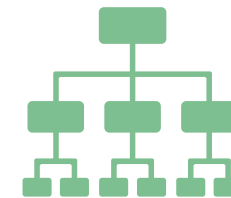
The survey was distributed online via a plethora of communication channels and cascaded to tens of stakeholders across the county. This headline results presentation attempts to relay back the main themes from the analysis of the travel survey.

The Gloucestershire Travel Needs Survey, was funded by Great Western Railway (GWR) and delivered by the GCRP. Individual responses to the survey will not be shared and the data illustrated reflects the overall picture of key themes.

Headline Results



January 2021
To
February 2021



29
Organisational
Responses
Overall

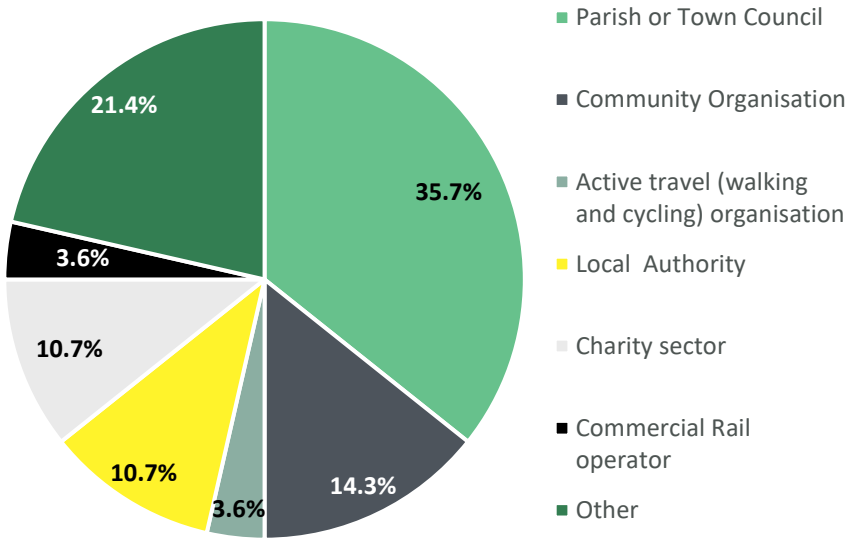


470
Individual
Responses

Organisation Overview

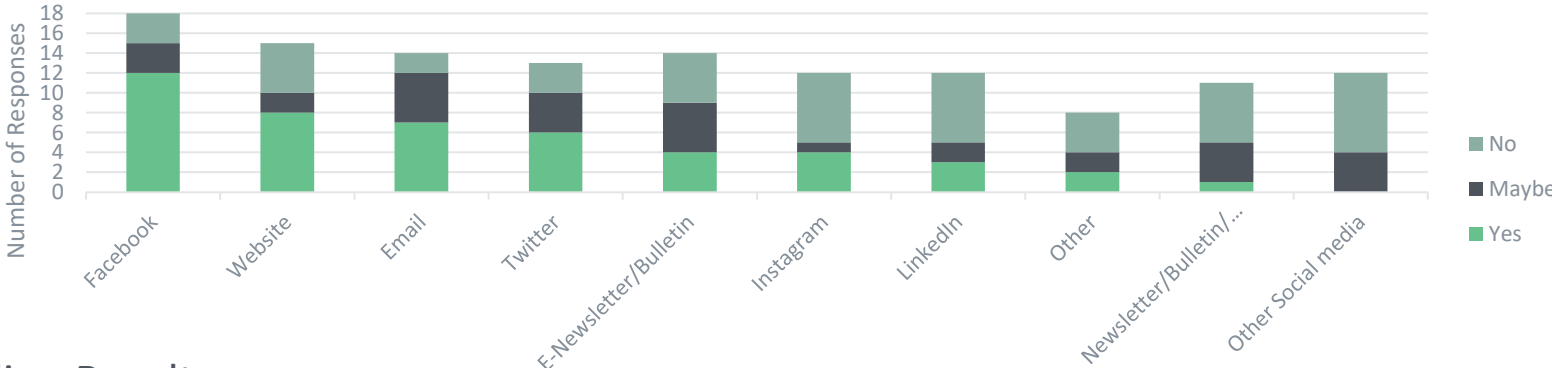
Organisations

Survey Response by Organisation Type



- 29 Organisations responded to the 'Organisation Survey'
- The majority (36%) of responses are Parish or Town Councils
- Other organisations include LEPs, B&B, and other Rail organisations
- 60% of organisations agreed to share the 'Individual Survey' with their client base
- The most preferred media for sharing the 'Individual Survey' is through Facebook channels
- Other media channels include websites, emails, and Twitter.

Preferred Media Channels for Sharing Survey



Headline Results

Localised Research

Organisations

- 30% of organisations conducted COVID-19 research
- More than 40% of organisations conducted travel behaviour related research
- Displayed are the types of surveys conducted



Accessibility



Active Travel



Cost school transportation



COVID-19 Related



Environmental



Parking surveys



Staff and student travel survey

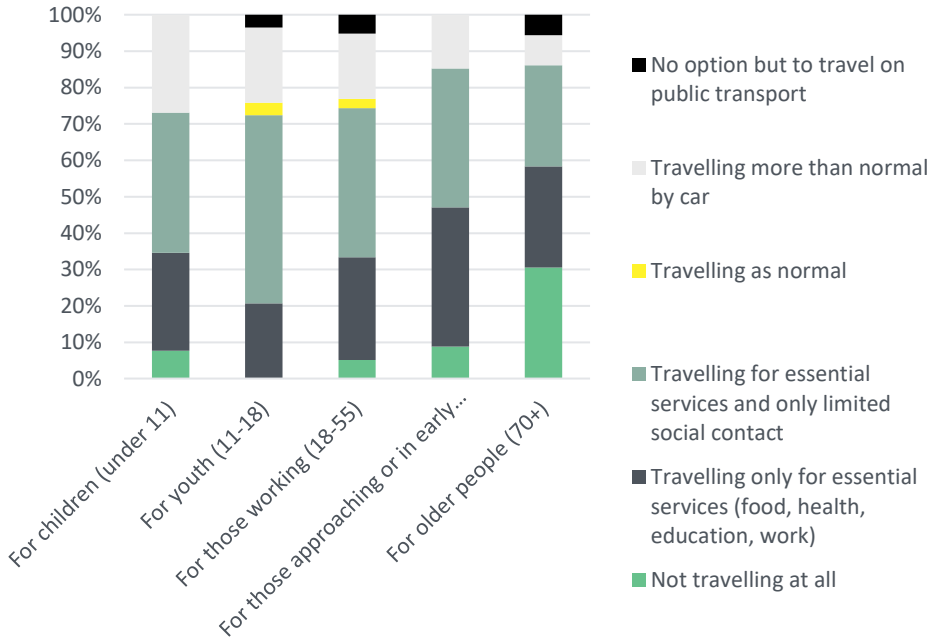


Traffic volume and speed surveys

Impact COVID-19

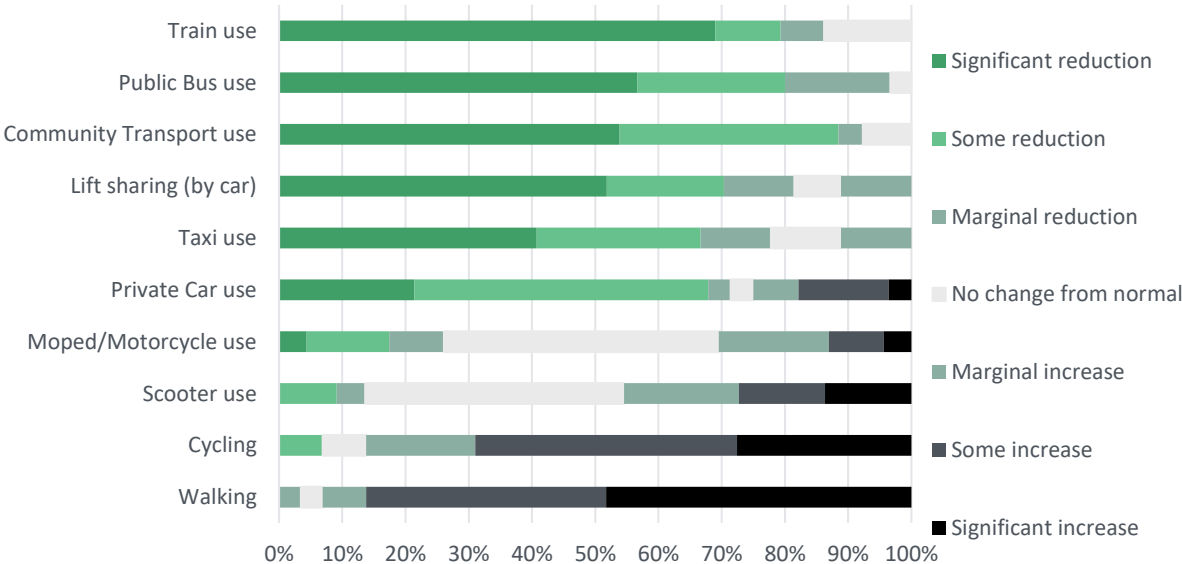
Organisations

Impact COVID-19 on Travel by Age Group



- More than 80% of older do not travel or only for essential services
- Up to 55 year olds are more likely to travel as normal, likely by car
- Children are more likely to continue traveling for education, likely by car
- Significant reductions are expected for public transport and car sharing
- Active travel and private motorised transport are more likely to increase

Impact COVID-19 by Mode of Transport

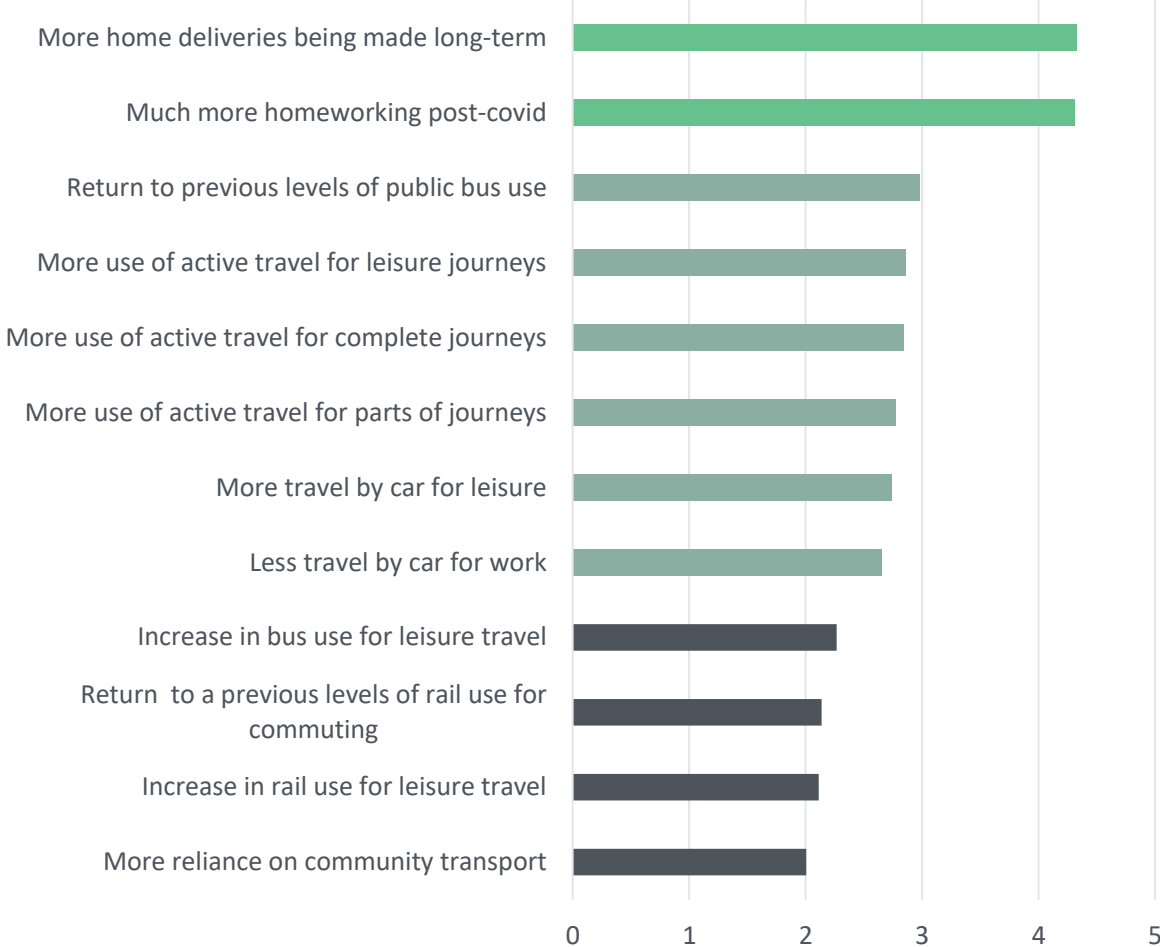


Travel Needs Post-Lockdown

Organisations

- It is expected that people will likely work more from home post-lockdown and home deliveries are therefore more likely
- Also, organisations expect bus travel to return to normal levels and car use and active travel to be leisure related
- Less reliance on rail and community transport is also expected.

Expected Travel Needs Post-Lockdown

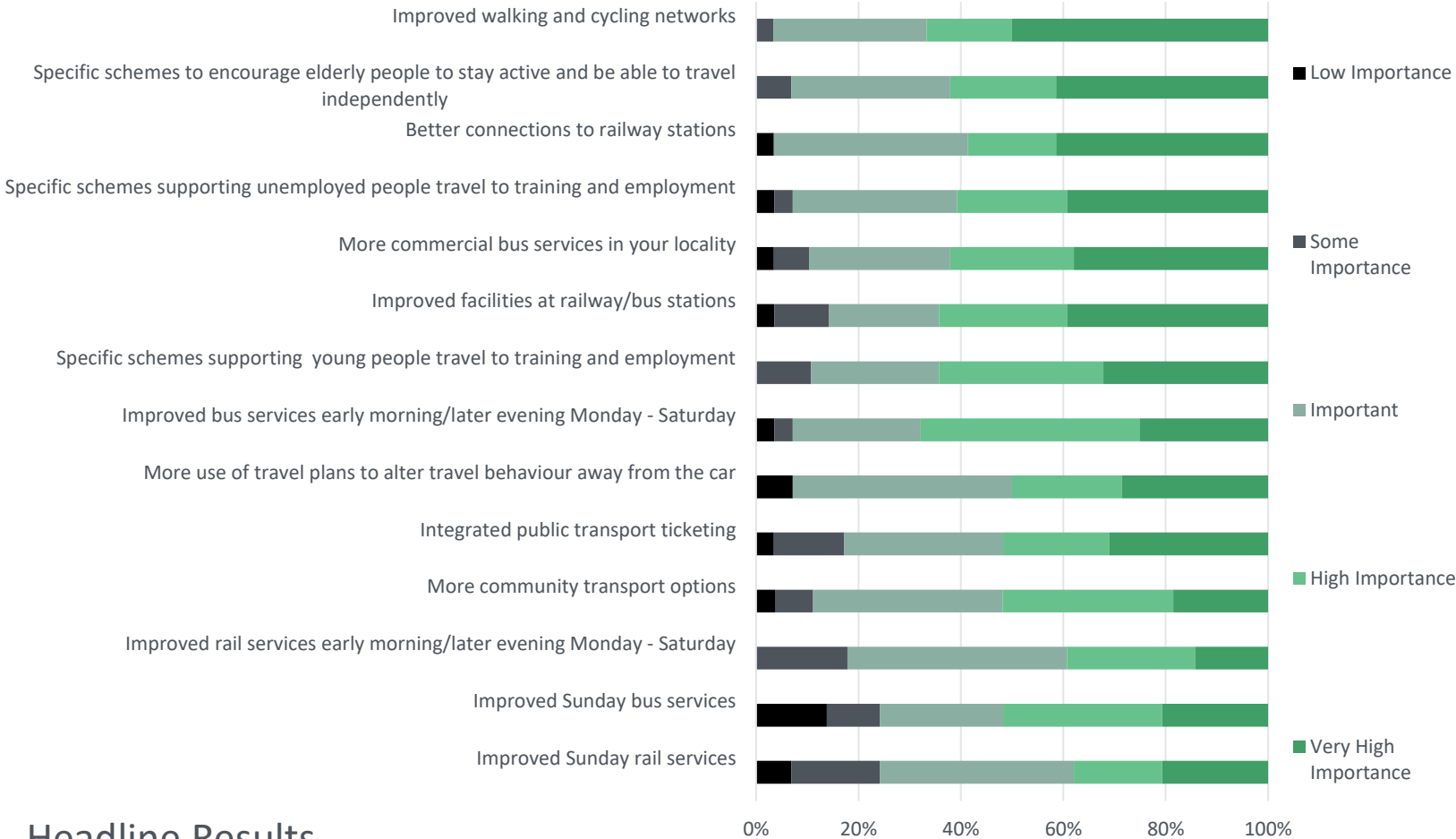


Potential Transport Improvements

Organisations

- Organisations see improved active travel networks and schemes for elderly to be important.
- Accessibility to public transport is also regarded of high importance.
- Organisations are less interested in public transport services, especially on Sundays.

Potential Transport Improvements by Importance



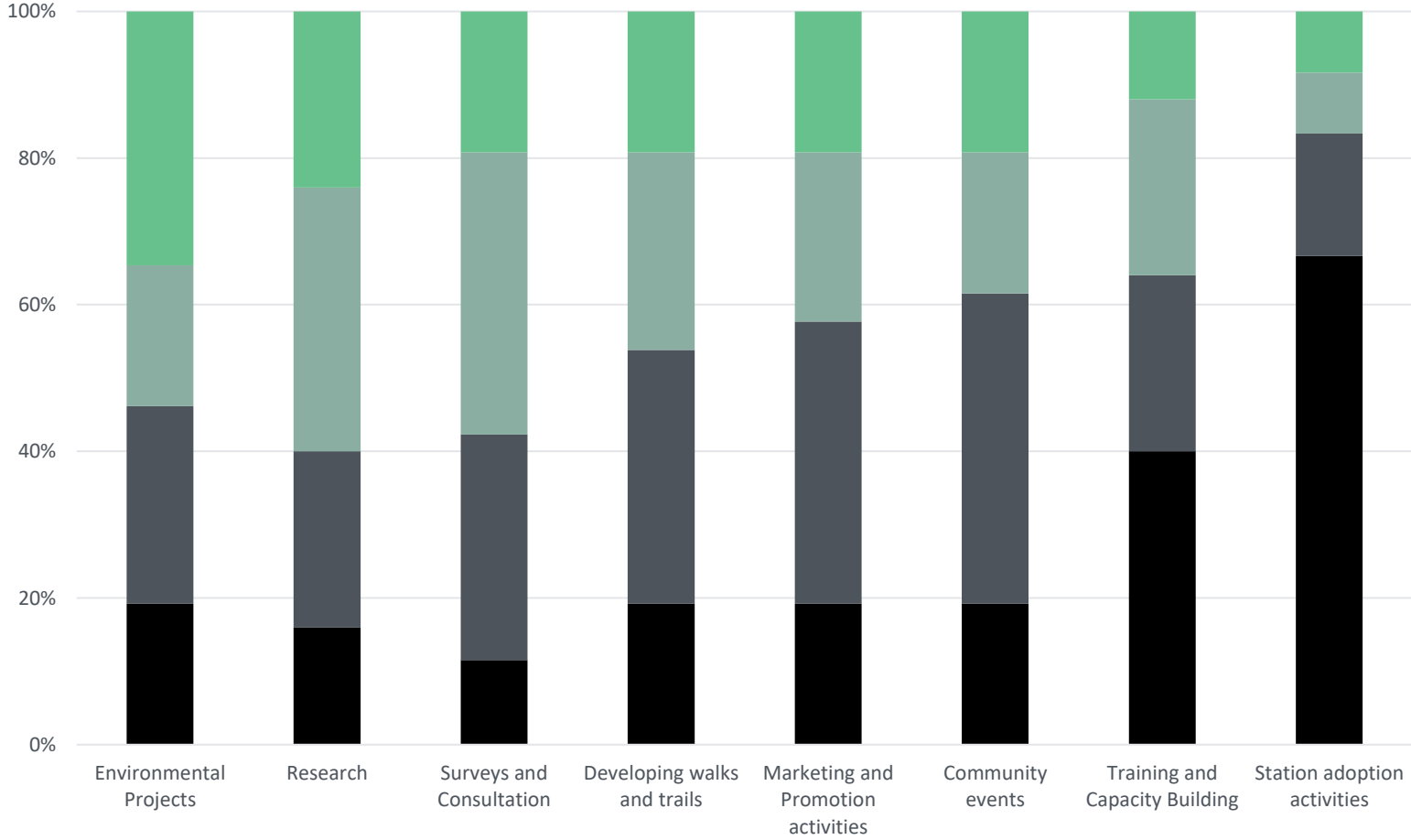
Headline Results

Potential Activities at Local Railway Stations

Organisations

- Environmental, research, and survey and consultation projects are most important to organisations
- Less important are walk and cycle trails, marketing and promotion, and community events.
- Station adoption activities are considered not relevant by 60% of organisations.

Potential Proposed Activities by Interest



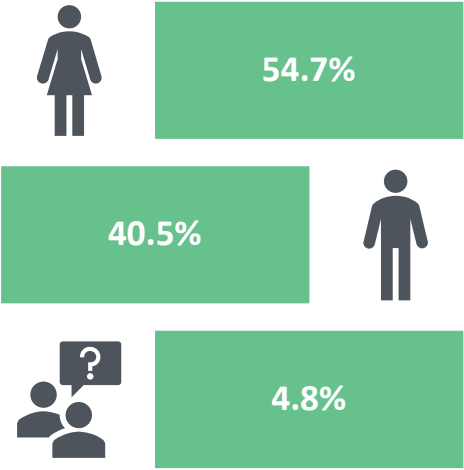
Headline Results

■ Not relevant to us ■ Would consider ■ Interested ■ Very Interested



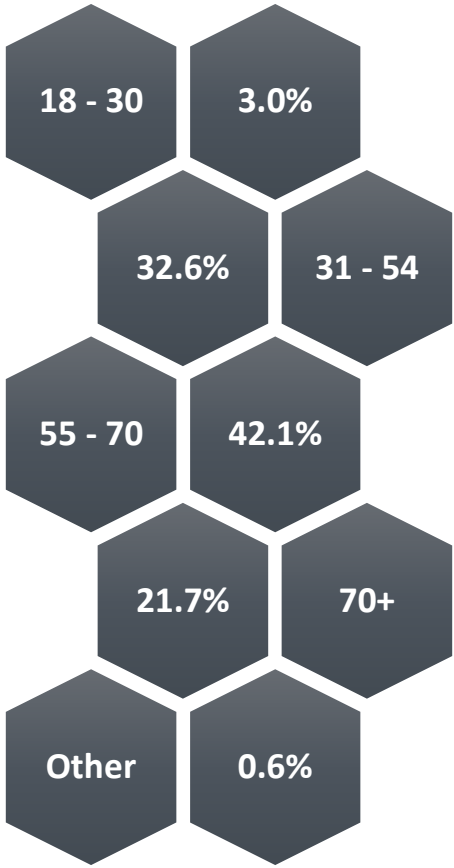
Demographic Overview

Individual

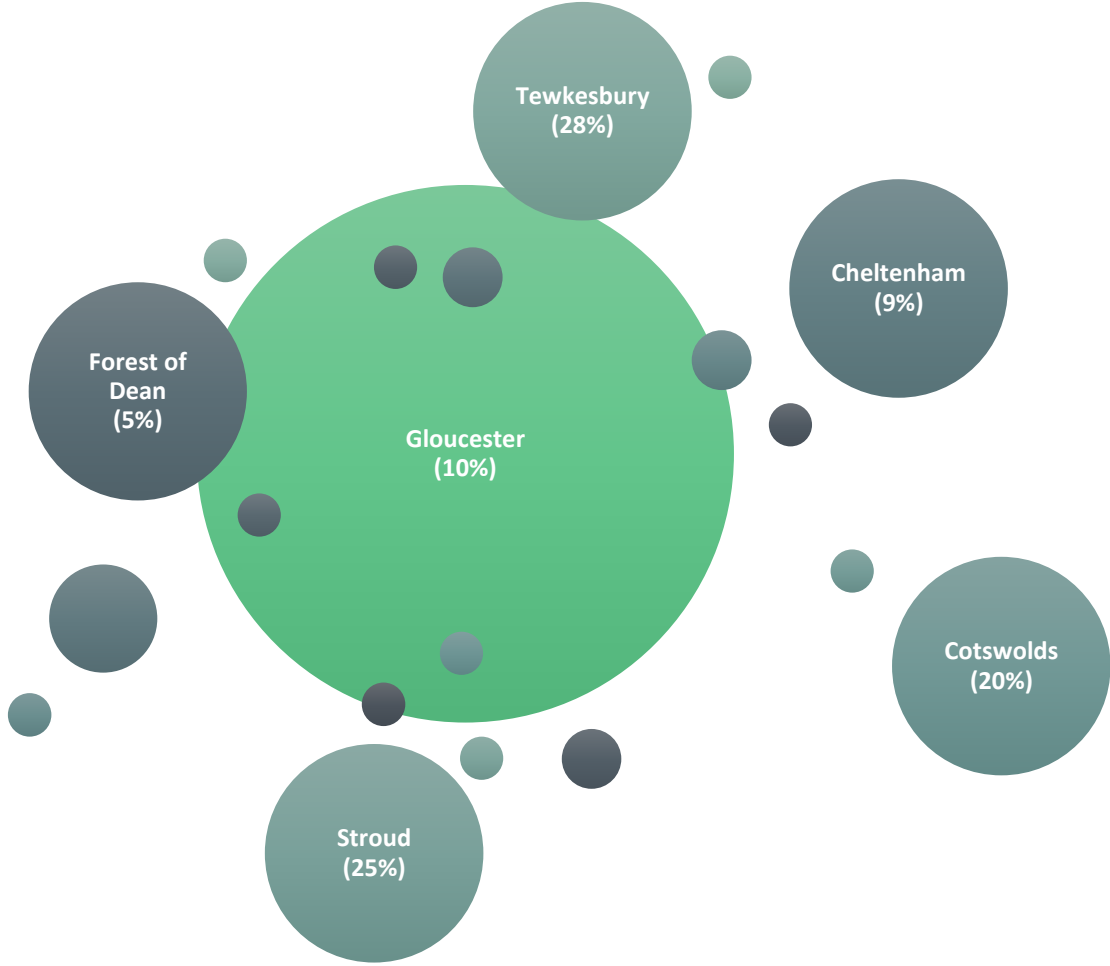


The survey was completed by 470 individuals where 54.7% identified as women, 40.5% identified as men, and 4.8% defined as other/prefer not to say.

The image below illustrates the survey response by age group. The highest response is by the 55-70 age group, followed by age group 31-54 and 70+ respectively. There was limited response 18-30 year olds and a small percentage opted 'Prefer not to say'.



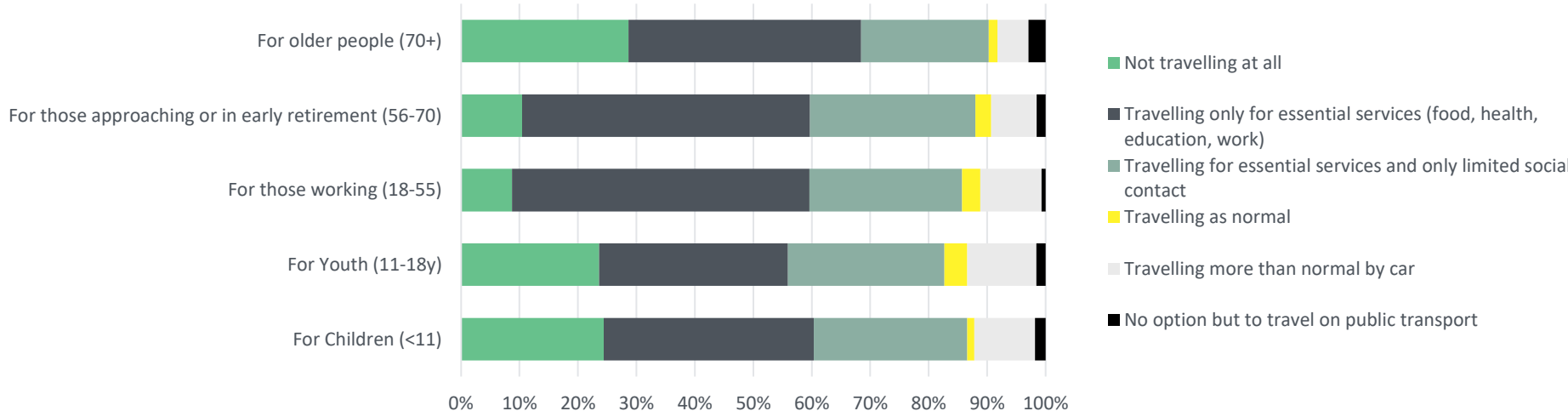
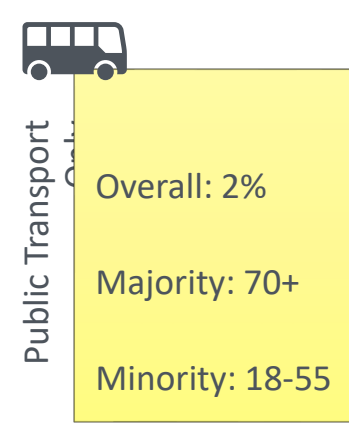
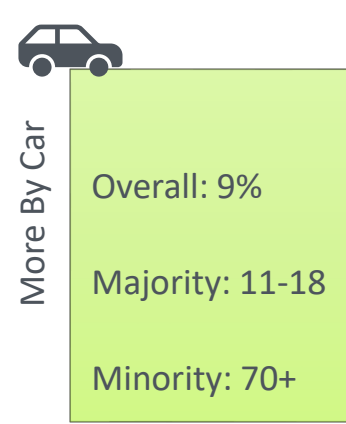
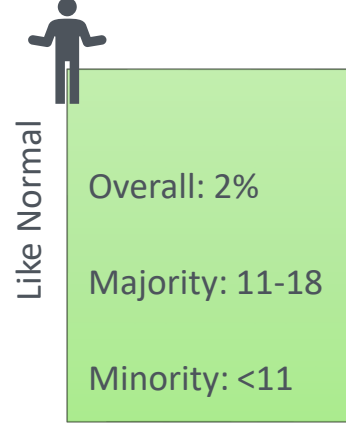
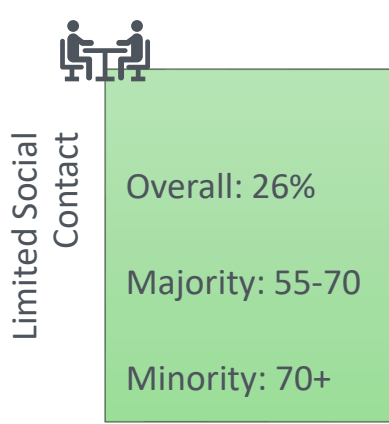
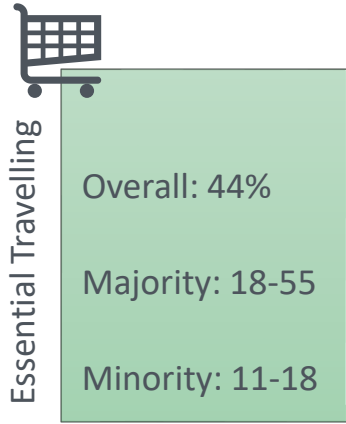
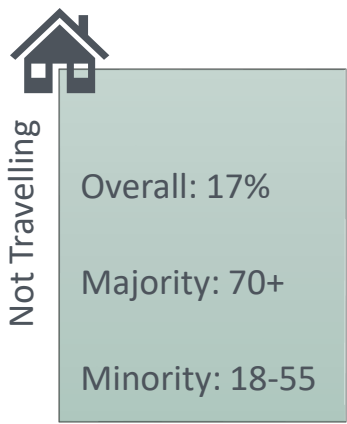
Headline Results



The right image above displays the response by district. The majority of responses are from Tewkesbury, Stroud, and Cotswold postcodes. The rest are made up from Gloucester, Cheltenham, and Forest of Dean postcodes. A small percentage (3%) of responses were from outside Gloucestershire or opted 'Prefer not to say'.

Impact of COVID-19

Individual



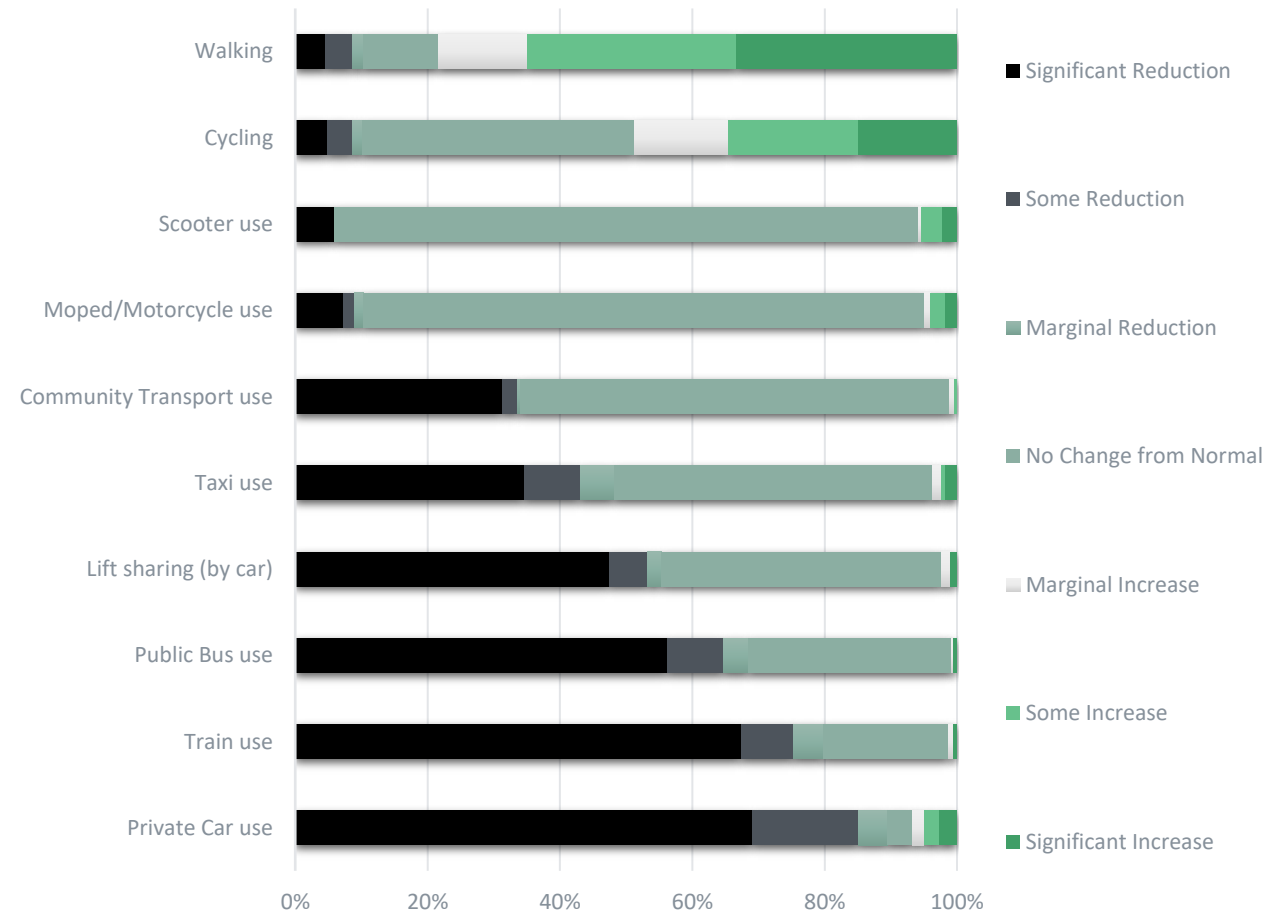
Headline Results

Travel During COVID-19

Individual

- Private car use and train use are expected to significantly reduce by 85%
- Public bus, lift sharing, and taxi use are expected to decline by at least 50%
- Community transport is likely to reduce slightly and scooter, motorcycle and moped use are likely to stay the same
- Active travel is expected to increase by more than 50%

Assumptions of Modal Shift During COVID-19

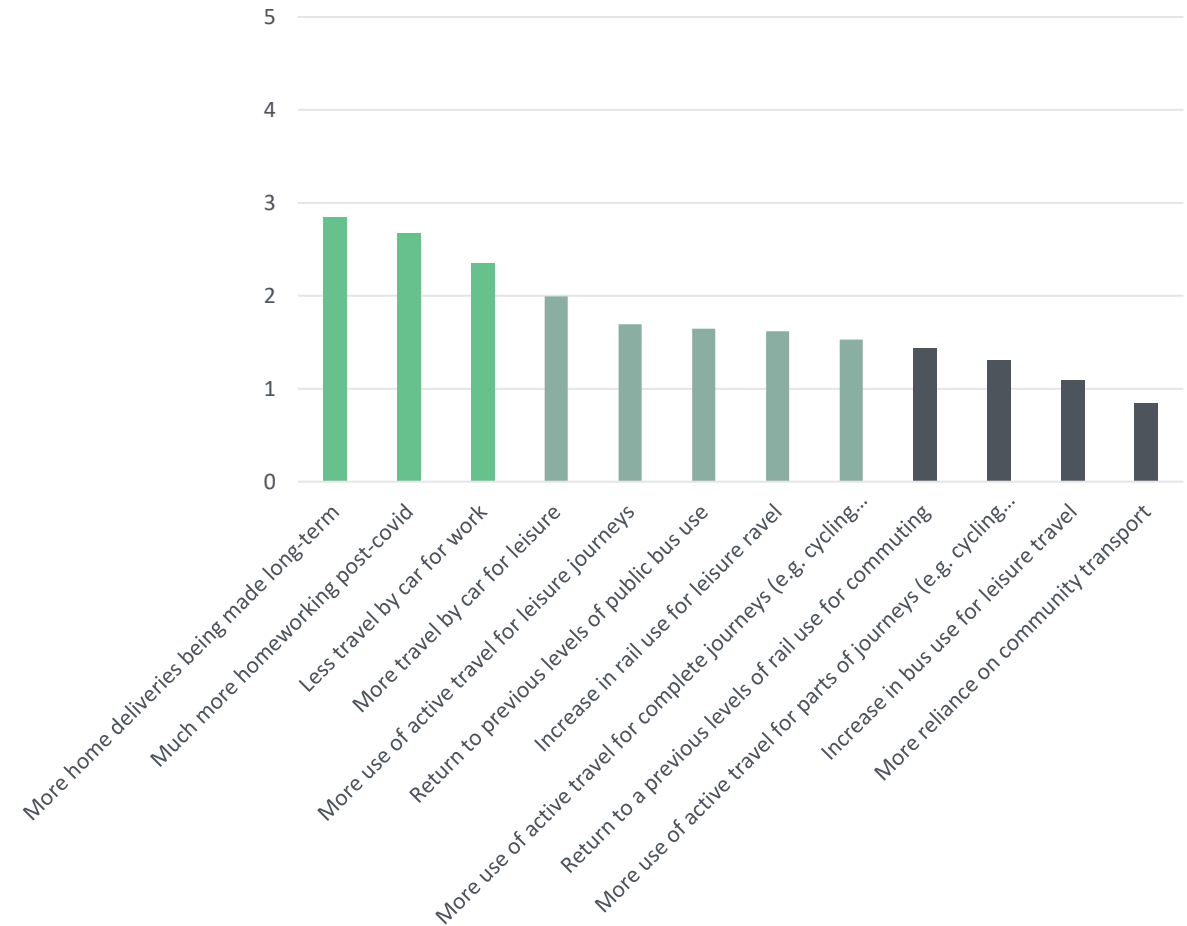


Travel After COVID-19

Individual

- People will use their car less for commuting/work and more for leisure but expect home deliveries to stay to reduce car journeys.
- People expect public transport to return to normal levels but mention usage could be improved by increased service frequency (especially rural areas) and improved integrated transport which accommodated for both leisure and commuting trips.
- Improvements of walking and cycling facilities are mentioned to improve active travel.

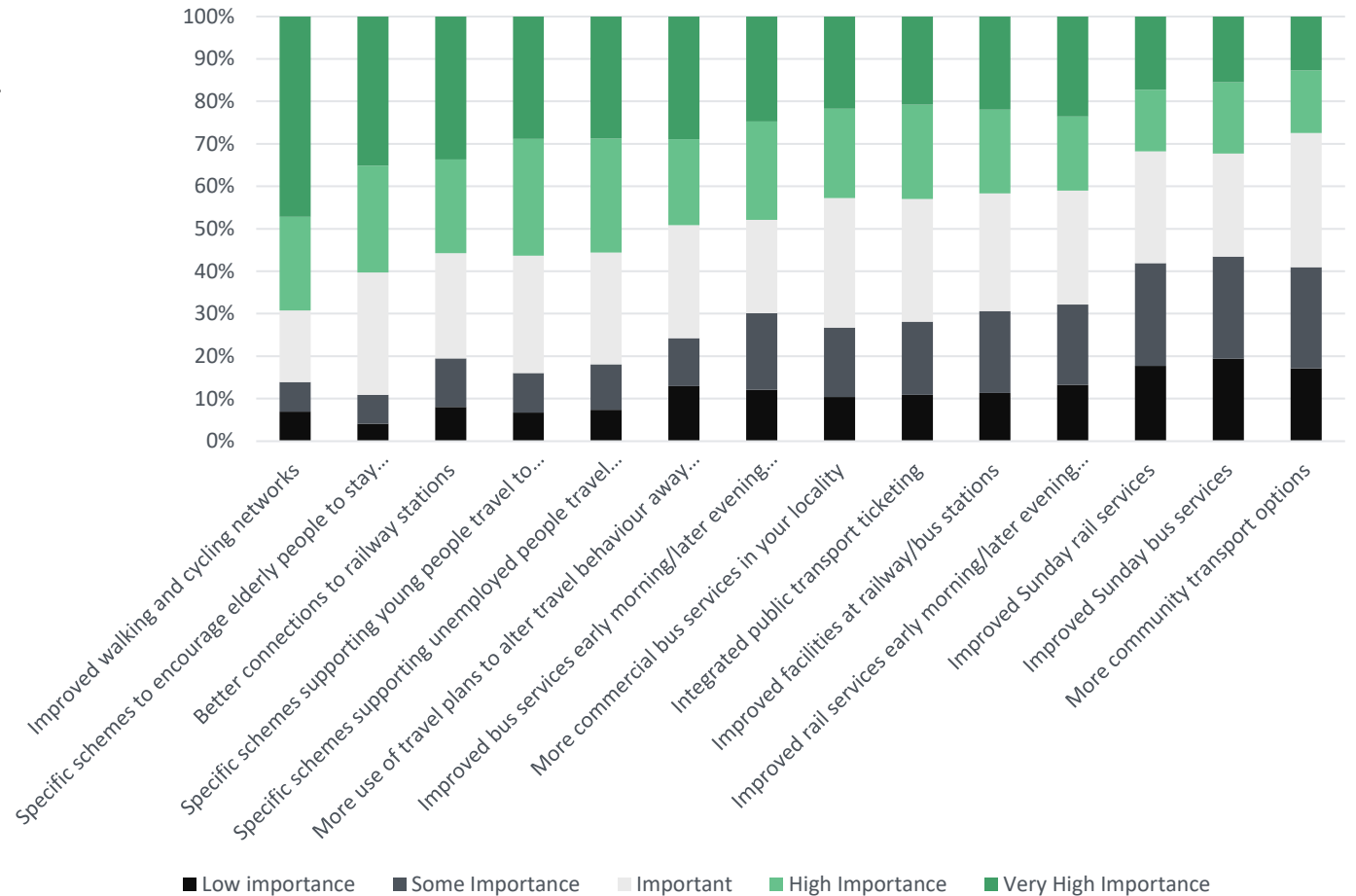
Expected Travel Needs Post-Lockdown



Future Improvements of Transport Individual

- People see improved active travel networks and schemes for elderly to be important.
- Accessibility to public transport is also regarded of high importance.
- Organisations are less interested in public transport services, especially on Sundays.

Potential Transport Improvements by Importance

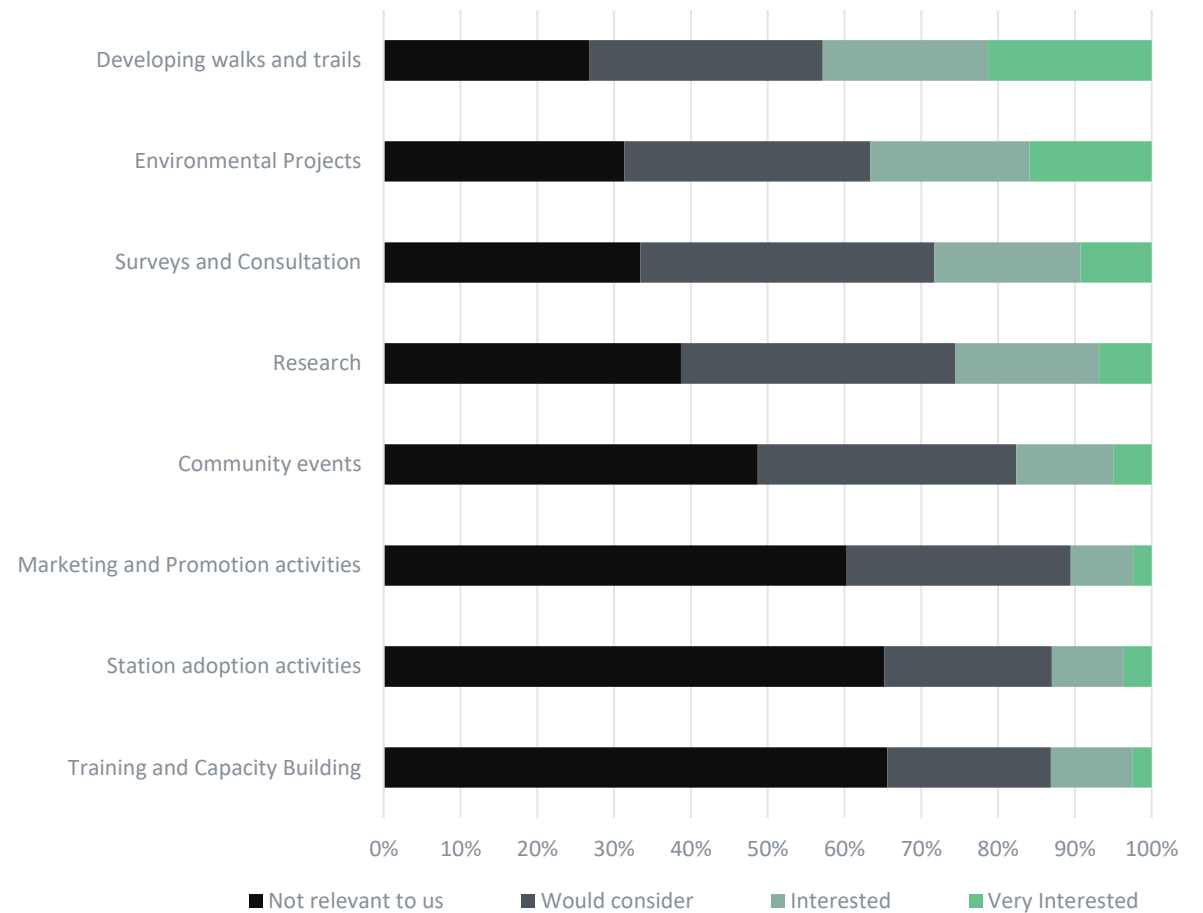


Potential Projects at Railway Stations

Individual

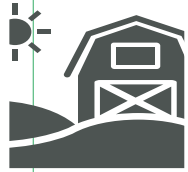
- Developing active travel trials is considered the most important project by individuals, closely followed by environmental projects.
- Surveys and consultation, research, and community events should also be considered as potential projects.
- There is limited interest in marketing and promotion activities, station adoption activities, and training and capacity building.

Potential Projects by Interest



Comment Extracts

Individual



No or poor public transport service is provided, especially prevalent in more rural areas.

People never use public transport due to the county's rural nature and indicate limited availability of lift sharing, community transport, and taxis in their area.



A large group expresses an interest in opening Stroudwater Station which would provide better access to Bristol. Also, other poor rail links are mentioned including Chipping Campden and Charfield.



It is important to provide (more) regular services to ensure people will return to use public transport post-pandemic.



People enjoy regular exercise through walking and cycling. However, people worry car usage will increase which will significantly reduce perceived safety.



More walk and cycle facilities including maintenance of facilities are imperative to ensure similar trends of active travel.

Thank You

GCRP Contact Details

For more information on the Gloucestershire context and the GCRP, speak to Jon Harris, Director for Planning, Accessibility, and Integration.

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Phone: