



**FOREST**

ECONOMIC PARTNERSHIP

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## Forest Employers Travel Survey

Initial Baselines of Rural Business Travel

PUBLISHED VERSION

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## Summary

The Forest Business Travel Survey attracted 51 usable surveys from across the District of the Forest of Dean. While this number is on the low side and precludes a range of detailed cross-analyses for statistical reasons, it does provide a reasonable snapshot of a range of business transport needs. The four major towns and Mitcheldean were well represented.

There was a good mix of those on business premises, the majority, with a fifth home-based businesses. 20 of the sample had an annual turnover in excess of £1M. The sample is skewed to larger companies as they have the more complex and servable transport needs. All 10 key economic sectors for the District were represented. Construction and tourism businesses were over-represented compared to Nomis figures.

When businesses who received no visitors were excluded; 60% of business visitors came from outside of the District. This underlines the economic activity in the area and the role that it can play in the Western Gateway and UK. 30% of visitors were from non-contiguous areas. 5% of visitors to £1M+ businesses were from overseas.

The construction companies confuse the origin of workers with high proportions drawn to regional and national sites rather than the office in the District. When they are excluded, 35% of the workforce comes from outside of the district and 65% travels within the District. The level of travel between towns is high with sizeable numbers that could be served with public transport if it were available and reliable.

79% of the workforce travels by car and 15% walks. Walkers tend to be for smaller companies; cyclists in the sample are only for the large companies. Only 3.3% are believed to use buses. Yet most respondents believe that their business is accessible by public transport. It is the same things that are in the inhabitant survey that will change minds ie increased frequency and certainty of arrival times of public transport. It's these positives that work not the negatives of increase charges for fuel or parking to make people use cars less.

Most businesses provide parking and for all staff. It is only the larger businesses who are typically charged for the parking they use. A fifth still provide company cars typically for senior and sales staff. 19% have installed electric vehicle chargepoints- mainly the larger companies. This is seen to double in 3 years with the growth proportionally higher in the smaller companies.

There is a surprising range of working hours amongst the businesses surveyed- 26 different options. This in part comes from the range of the sample. The old perception of the shopfloor has to be punctual to the minute while the office can drift in a little late with no issue still pertains. Surprisingly over 60% of respondents did not believe it was likely post-Covid that there would be increased opportunity to work from home. Employees would still need to attend but there might be more flexibility.

There were low percentages of businesses with CSR, sustainability, carbon neutrality or employee carbon monitoring. This reinforces the need for positive messages to create awareness of the opportunities to change to MaaS rather than assuming a low carbon message will win the day.

Businesses are likely to visit the new local Growth Hub in Mitcheldean but unlikely to take public transport as too difficult to get there. If the Growth Hub is able to articulate the services it can provide and consider ways of aligning transport with events, this could overcome this issue.

The Forest Business Travel Survey reinforces the potential for a rural MaaS service to enable the use of publicly accessible transport based on sensible economics, the avoidance of future costs for the business and the maintenance and expansion of current business outside of the Forest of Dean District.

## 1. Introduction

The Forest Business Travel Survey was undertaken as part of Rural Technologies' MaaS: Enabling Rural Geospatial e-Solutions (MERGeS) project funded by the Geospatial Commission's Innovate UK SBRI competition: Using geospatial data to solve transport challenges phase 1.<sup>1</sup>

Alongside this survey there is a separate survey for inhabitants, which had almost 400 usable responses. Businesses need a separate survey to confirm how much travelling their employees take to their business sites from locations outside of the District of the Forest of Dean. It also looks at some of the smaller businesses that work from home and may not need a 'commute' transport, but might require transport at other times. It captures some of the reality for businesses in rural areas, which despite some expectations are not dependent on tourism and agriculture but are vibrant economic communities drawing business travellers from across the region, UK and internationally. The district has 10 key business sectors with manufacturing the largest at 16% of the working population. This is twice the national urban average.

Rural Mobility as a Service (MaaS) is poorly understood. Yet it provides an opportunity to overcome many of the obstacles of rural travel given the opportunities of Industry 4.0 and the threats created by the Carbon Emergency. Rural areas depend on car ownership to travel. The decision to sell no new purely petrol or diesel cars from 2030 will directly impact on the ability of rural areas to move around. If all owners were to move simply to electric vehicles there would be strain on the electricity generation and transmission networks. National Grid currently estimate that it will increase peak demand by 8% if consumers use best practices. The rollout of mobile and broadband coverage does not augur well for a large-scale deployment in rural areas. Some businesses have already installed EV charging points, but they are typically limited in number and may be restricted to certain car owners. If one charges the company EV at home, how does one show a receipt for the power used to claim on expenses?

Can MaaS replace the need for cars? No, such a view is unrealistic but changes in models of car ownership and in the needs to travel suggest that a sensible target would be to challenge the need for a second or third car by being able to offer an alternative. If an approach to rural MaaS fails the alternatives are limited. MaaS is a good tool to effect modal change by creating awareness and beginning to turn the decline spiral the other way for public transport. It starts by aggregating demand which may be based on destinations, where there is a flow one way in the morning and the reverse in the evening. It may also ask businesses to alter hours of work to optimise use of capital resources- the fleets that stand idle when the school run is finished.

Data on rural transport is relatively limited. Data is available on the main trunk routes that cross the nation. Less well-known are the movements within districts partly because the presumption that they will be covered by using a car. However, there was no intention that this survey would seek to obtain all the data that would be required to understand the full feasibility of a MaaS service. Instead with the constraints of Covid, it begins the collection of baselines on perceptions and outline use.

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<sup>1</sup> Please see back page for more information on the funding

Travel is a significant issue for rural areas. This has a regional dimension with the creation of the region of the Western Gateway as an economic powerhouse. Its Ambition 1: is to “Deliver world class physical and digital connectivity, boosting productivity, unlocking housing growth and leading our transition to a net zero future. We want residents and workers to be able to travel within the area in a ‘golden hour’ with one Western Gateway smart ticket.” For this to be achievable it needs to use multiple modes of transport.

## 2. The Sample

The data for this survey was collected through an on-line questionnaire available from 3<sup>rd</sup> February to 24<sup>th</sup> February 2021. The survey comprised 18 questions and took on average 7 minutes to complete with an 82% completion rate. 56 surveys were received in the time period. These were reduced to 51 when those out of area or were significantly incomplete were removed.

The survey was promoted by FEP through the following channels:

- All 200+ organisations and individuals who are members of FEP received it in their monthly newsletter
- The survey was posted on FEP social media namely Facebook and Twitter.
- Members promoted the survey at business networking groups such as CAP
- Vantage Point Business Village emailed all 100 businesses on their Mitcheldean site requesting that they complete the survey.
- When it was clear that business survey fatigue was kicking in for most businesses (the team were aware of at least 8 other surveys targeting businesses in the same period); the core admin team of FEP contacted a range of companies with a personal request to complete the survey in order to achieve a minimum statistical base.

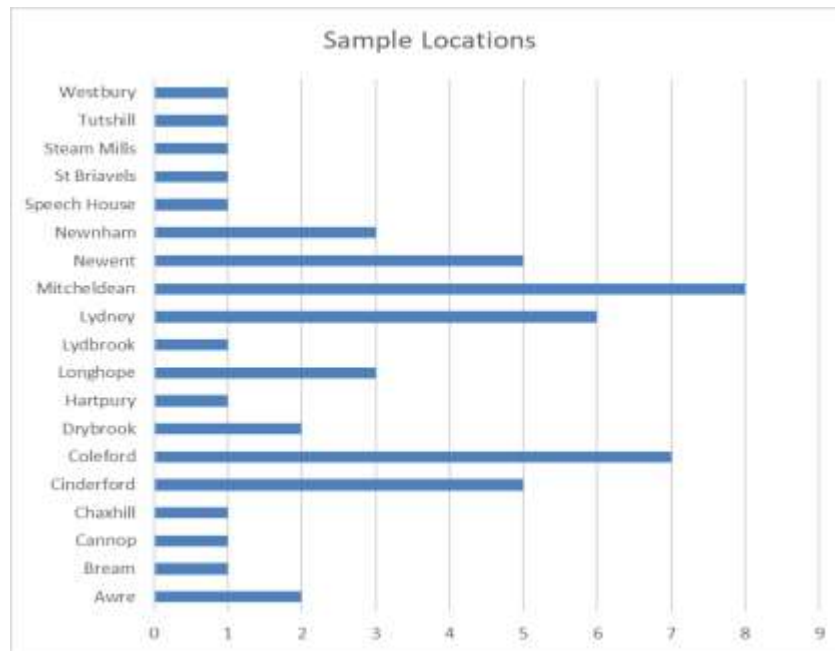
Despite the difficulties of gaining responses initially, the sample does provide a good cross-section of businesses in the Forest of Dean District.



From the title chart, it can be seen that most respondents were senior figures in their business. 46% had a Director title including Managing Director, HR, Operations, and Commercial Director.

28% were Managers. But, these were typically in smaller businesses where a managerial title would still be a member of the senior leadership team.

26% were owners or partners.

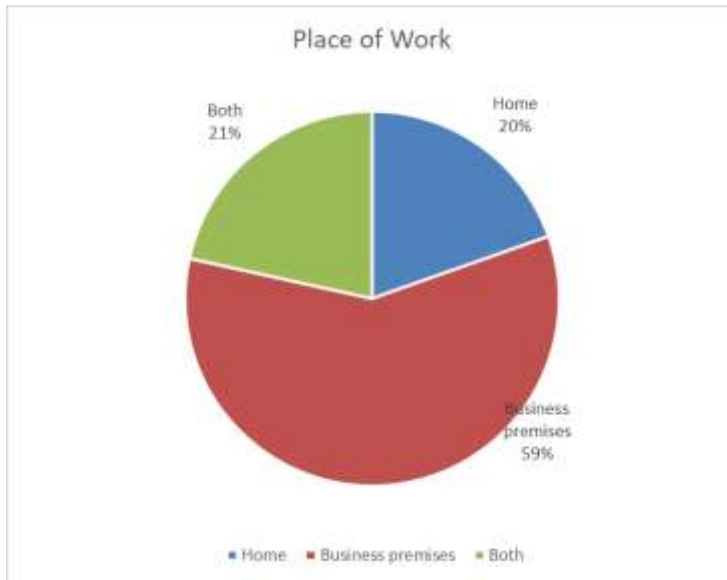


The sample was spread across the district. With the Vantage Point focus, Mitcheldean had the most companies with 8 on one site. The 4 major towns had between 5-7 businesses. These typically were also in business premises on business parks.

Conversely Newnham and Longhope were in 3 discrete locations as was Awre and Drybrook with 2 each.

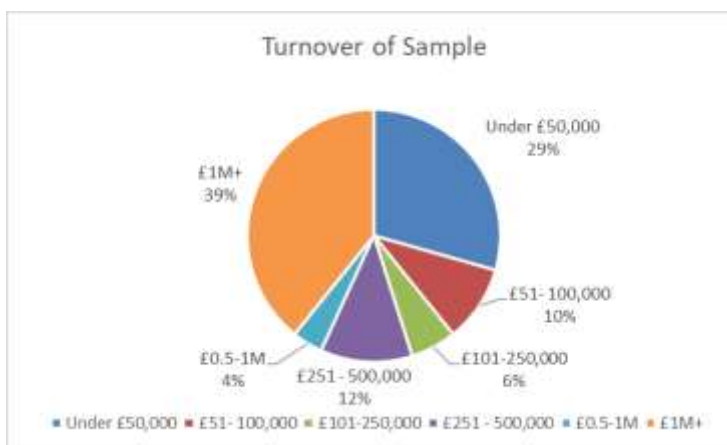
The range of single town or village respondents accurately reflects the way that businesses are dispersed across the District in a range of small business parks or home premises.

The areas notable by their absence are Tutshill/Sedbury, Staunton, Bury Hill, Parkend/Whitecroft, Blakeney and Woolaston. However, the lack of strong response from these centres does not invalidate the broad conclusions of business travel needs and approaches in the District. From the Forest Inhabitants Travel Survey, it was seen for example that those living in Tutshill/Sedbury are more likely to be commuters out of the district to Bristol and Welsh towns. While the other 6 centres have similarities with other areas which are included in the survey.

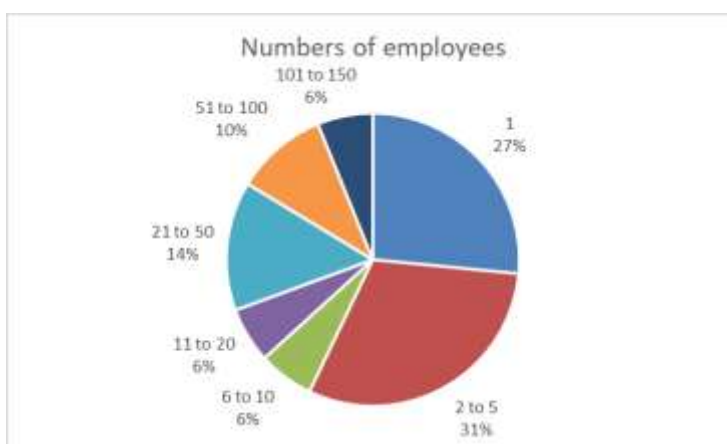


The sample is a mix of businesses working from business premises either in business parks, high streets or standalone (59%). A fifth worked solely from a home office.

FEP's broadband survey [How Fast How Good?](#) identified that there are already a high proportion of district inhabitants working from home. When those not of working age or retired are excluded, over 80% use home broadband for business use. 11 businesses in this sample had some staff already working from home on a regular basis as well as occupying business premises or were an accommodation business.



The District has some 4,090 businesses according to Nomis 2020. Of the businesses 3,750 are micros, 295 are small, 40 medium and 5 large by employee count.

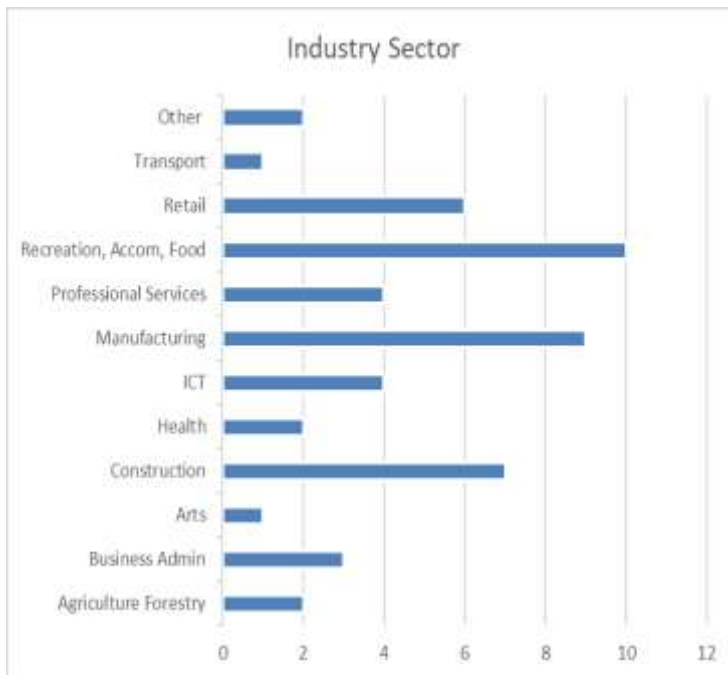


From the turnover figures, it can be seen that the sample captured the micros with 39% turning over less than £100,000. Another 39% of the sample turns over in excess of £1M per annum. The sample is therefore skewed towards larger companies. The reason for this is simple; they are more likely to have employees travelling to a single destination on a daily basis which would fit better with organised travel flows.

The District has 33,000 jobs. 64% are full-time and 36% part-time. Again, the sample captured a good range of business sizes by number of employees. 27% were single person businesses while 3 employed over 100 individuals

64% of the sample were micro compared to the Nomis 91.7%; 20% were small (7.2%) and 16% were medium (1%). None of the sample were large companies employing over 250 people of the five said to be in the District.





Sector	Percentage of working population
Other	17%
Transport	4%
Retail	11.9%
Recreation, Accommodation, Food	6.9%
Professional Services	8.9%
Manufacturing	15.9%
ICT	2.8%
Health	11.9%
Construction	5.9%
Arts	2%
Business Admin	5.9%
Agriculture Forestry	6.9%

There is often a presumption that the District is reliant upon forestry, agriculture and tourism, but this only accounts for 14% of the working population whereas by itself manufacturing accounts for 16%. The latter is twice the urban average and 4% more than the national rural average.

All the key sectors in the District were represented in the sample. Construction is over-represented with double the sample as percentage employed as are recreation, accommodation and food. Some care therefore needs to be taken with some conclusions as construction typically takes place on sites, which may be throughout the region and nationally rather than within the District and could be van-based for the trades. Recreation, accommodation and food is a place-based business with specific shift patterns involving multiple staff and may counterbalance construction in the overall conclusions.

In the analysis below, most of the results are shown as being the whole survey with the numbers responding shown where they are distinctly different from the overall 51. In some areas limited cross-analysis has been done where there is a statistically valid sample size. These are based on:

- Location of business where it informs travel plans
- Size of business based on turnover with 15 respondents under £50,000; 16 respondents £100,000-1M and 20 respondents over £1M. Roughly this translates as micros often from home, substantial businesses typically on business premises; significant businesses with a good number of employees. They are called small, medium and large in the District context.
- Type of premises whether business or home premises.

### 3. Getting to Work

#### 3.1 Visitors



In a business travel survey for a specific rural district, it may seem odd to begin with the 33 businesses, who welcome visitors to their site.

The non-respondents are often home-based businesses, where visitors are uncommon.

The businesses were asked to allocate percentages to their visitors' origin rather than specific

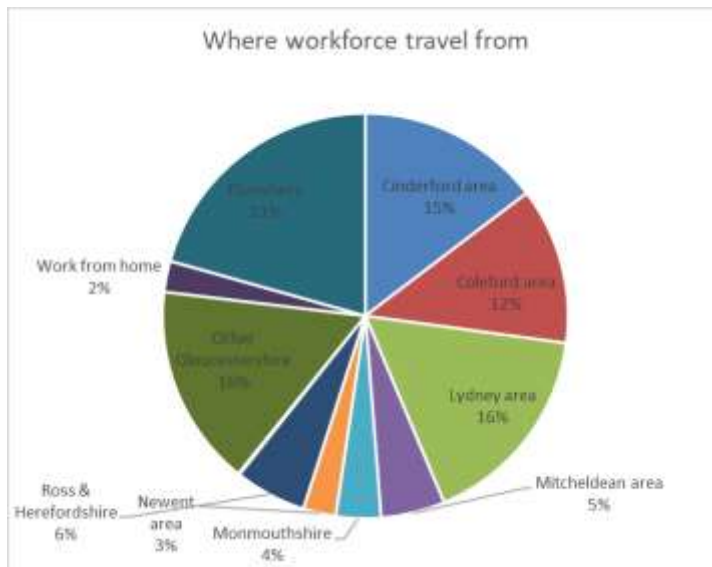
The reason for starting with visitors is simple. 60% of visitors to District businesses come from outside of the District. How they get here is therefore a fundamental part of the transport needs of the District. 30% come from surrounding counties; but 30% are national or international visitors. This is not skewed unduly by the responses from tourism businesses given the responses from large manufacturing and professional services businesses. The 203 square miles of the District is truly open for business. This bodes well for participation in the Western Gateway.

	Forest District	Rest of Gloucestershire	Monmouthshire	Herefordshire	Worcestershire	Other UK	Overseas
Small	43.9%	11.7%	3.5%	3.8%	0.9%	35.6%	0.5%
Medium	55.5%	18.2%	8.3%	7.4%	0.8%	8.8%	1.0%
Large	19.4%	15.4%	7.2%	7.2%	3.5%	42.5%	5.0%

The analysis by business size shows that small and medium businesses have the highest proportion of their visitors from the Forest District itself. But small businesses also have a high proportion of other UK visitors more akin to the large companies. 5% of visitors to large businesses are international.

If the common perception of the District of the Forest of Dean is as a tourist and agricultural economy, then the travel patterns of visitors to businesses demonstrates that this is wrong. It already engages regionally, nationally and internationally across its 10 significant business sectors. It is therefore economically important to ensure that those visitors to businesses can get there, efficiently, flexibly and with choice. If the trend for under 30's in urban areas not to learn to drive is correct, then publicly accessible transport would be their only option or failing that the need for a double station pick-up by the company.

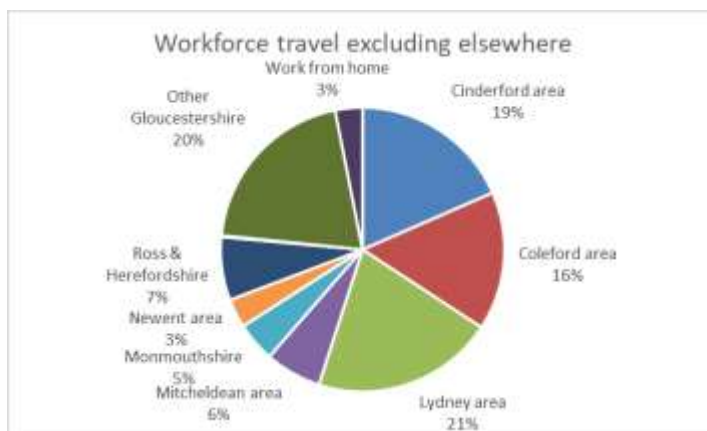
### 3.2 Staff



The first chart shows all responses with the proportion stated by the respondents multiplied by the numbers said to be in their workforce overall.

This is why work from home, is only 2% of the total workforce. It assumes that therefore they don't travel at all to get to work per se.

The issue this creates is the 21% who travel from areas not identified. This might be South Gloucestershire, other Welsh counties or other areas in the Midlands. There is a strong correlation with the construction companies as one identified 200 employees in this category. These are probably workers working on building sites outside of the area. With 49% of workers in the sample not in the official Travel to Work Area for the District, it raises questions as to the current basis of that presumption.



The second chart excludes those travelling from elsewhere. On this basis 65% of the workforce travel within the District.

20% come from other parts of Gloucestershire and it's presumed that the majority of these would come through Over and Highnam before heading South or West on the A48 or A40 or North to Newent. The significance of this is the proposed park and ride interchange at Over and the potential onward travel needs away from the Gloucester-Cheltenham conurbation. This is a MaaS opportunity.

The table below is a cross correlation of the town of the premises with the approximate number of staff said to travel from that area. The figures in bold denote that the destination and the origin of the worker is roughly the same. The location of the first response is based in Cinderford and 5 of its employees would come from the area around Cinderford while one comes from Coleford, one from Monmouthshire and one from Ross/Herefordshire.

The bigger numbers tend to be manufacturing and construction companies. Lydney's are wholly manufacturing on sites in the town. Here sizeable numbers also come from Cinderford, Coleford

and Mitcheldean. This has obvious potential for bus or minibus services, if the starting times coincide, for a commercial number of passengers on a daily weekday basis. They could also accommodate travel for the smaller organisations at the same time for destinations along the route.

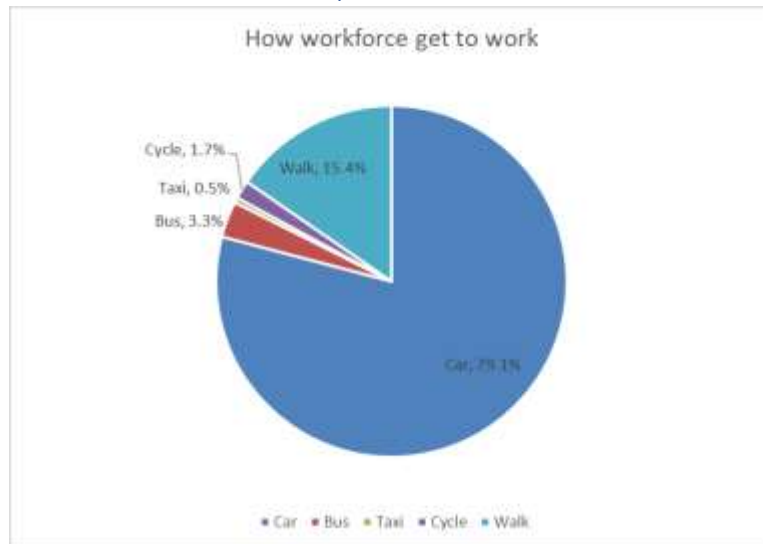
Town of premises	Cinderford area	Coleford area	Lydney area	Mitcheldean area	Mon mouth shire	Newent area	Ross and Hereford shire	Other parts of Gloucester shire	Work from home
Cinderford	5	1	0	0	1	0	1	0	0
Cinderford	68	45	68	23	0	0	23	23	0
Cinderford	2	0	0	0	0	0	0	0	0
Cinderford	0	1	1	0	0	0	0	0	0
Cinderford	12	6	3	9	0	0	3	0	0
Cinderford	2	0	0	0	0	0	0	0	0
Coleford	6	18	6	0	12	0	12	6	0
Coleford	0	4	0	0	0	0	0	0	0
Coleford	1	1	0	0	3	0	0	0	0
Coleford	4	0	0	0	0	0	0	0	0
Coleford	1	0	0	0	0	0	0	0	0
Coleford	0	1	0	0	0	0	0	0	0
Lydney	20	20	20	7	0	0	0	33	7
Lydney	22	22	44	15	15	7	0	7	15
Lydney	1	0	0	0	0	0	0	0	0
Lydney	1	3	31	1	2	0	1	3	0
Lydney	0	1	2	1	1	0	0	0	0
Mitcheldean	0	0	1	1	0	0	0	1	0
Mitcheldean	0	0	2	0	1	0	0	2	0
Mitcheldean	0	0	4	0	0	0	6	10	0
Mitcheldean	0	1	0	1	0	0	1	31	0
Newent	1	0	0	0	0	8	0	1	0
Newent	2	0	0	0	0	11	6	5	0
Newent	0	0	0	1	0	3	0	0	0
Newent	0	0	0	0	0	0	0	1	0
Newent	0	0	0	0	0	0	0	0	0
WAN	2	0	0	0	0	0	0	0	0
WAN	8	8	8	4	0	4	0	23	8
WAN	0	0	4	0	0	0	0	0	0
WAN	12	6	30	0	0	0	0	72	0
WAN	1	0	0	0	1	0	0	0	0
<i>Total</i>	<i>169</i>	<i>136</i>	<i>222</i>	<i>61</i>	<i>35</i>	<i>33</i>	<i>52</i>	<i>216</i>	<i>29</i>
WAN =Westbury, Awre, Newnham									

Westbury, Newnham and Awre have been put together as they fall 'North' to 'South' on the A48 and could be grouped for travel, again if start and finish times coincide. Those coming from other parts of Gloucestershire must come South down the A48 to reach Westbury first, then Newnham and Awre. 23 employees would come from Cinderford via Littledean, then south; 14 come East

from Coleford potentially in a minibus rather than individual cars and 42 come North from Lydney based on these figures alone.

The four respondents at Mitcheldean have conflicting and odd responses overall. It appears their workers come over the Severn rather than provide local employment.

### 3.3 Staff Mode of Transport



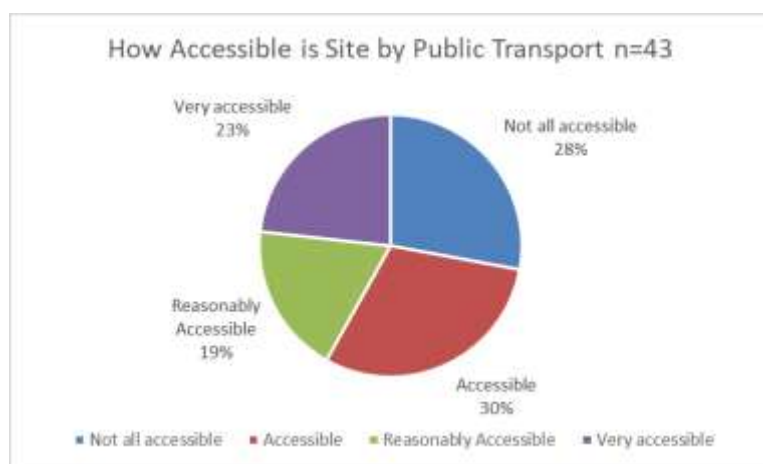
The most common form of transport to work is the car at 79 % based upon estimations of the proportion using each form of transport.

From the Forest Inhabitants Travel Survey, 86% of those working 5 days per week took a car, 69% of those working 2-3 days and 58% of those only working a day. The 79% is in line with this.

More positively 15.4% are estimated to walk and 1.7% to cycle. Active travel is therefore an option. The taxi is however a statistical quirk from one company. In this case it was more likely to be minibuses collecting 20 construction workers rather than a cab. Overall, only 3.3% of workers are estimated to use a bus.

	Car	Bus	Taxi	Cycle	Walk
Small	80%	6%	0%	0%	14%
Medium	89%	0%	0%	0%	11%
Large	85%	5%	1%	5%	4%

The table implies that the larger the company the less likely a worker is to walk but is more likely to cycle to work.



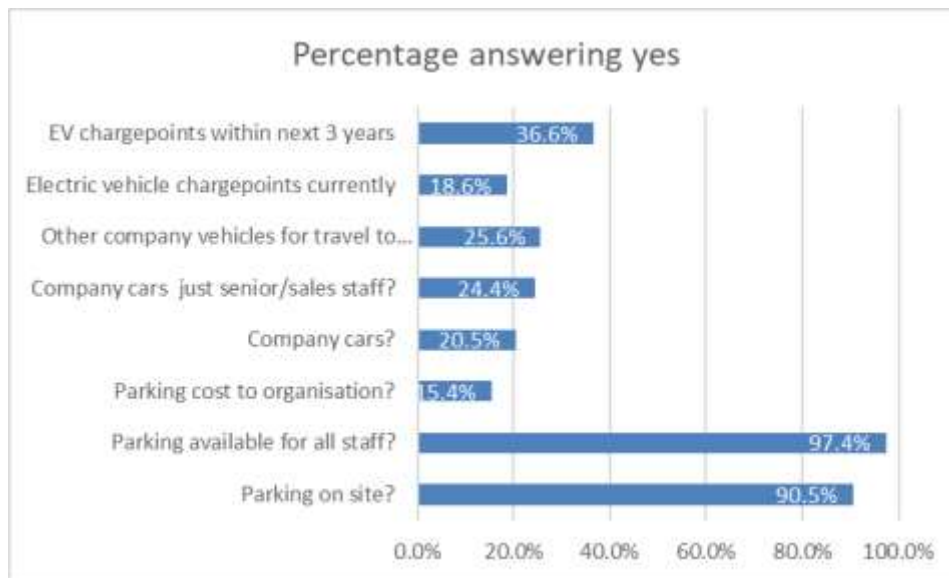
For 28% of respondents, their premises are not at all accessible by public transport in their belief. For 30% it is just about accessible which implies a reasonable walk rather than a bus stop outside.

For 23% conversely, their site is very accessible to public transport. So, for 42% of respondents there is very or reasonable accessibility to public transport.

For larger companies, more likely to be on a sizeable business park, then public transport accessibility is most likely to be reasonably accessible.

Given the last two statements, the key question is why public transport is not more used by their employees as a means of getting to work. The answer is probably timetables, the need for certainty and assumed flexibility that holds buses at only 3.3%. This suggests the opportunity for a destination travel approach from multiple operators, where there is certainty at the interchanges that vehicles will arrive for travel in comfort and at a lower financial and environmental cost.

### 3.4 Parking, Cars and EVs



The presumed prime mode of transport to work was expected to be the car. This section deals with some perceptions and expectations around car use. The number of respondents in the above chart varies slightly by the question between 39 and 44.

For 90% of respondents there is parking available at their business site and such parking is available for all staff. From the table below it is the smaller companies where there is less likely to be parking on site.

Overall, 15% of organisations have a parking charge levied. This applies for a quarter of the larger businesses but none of the smaller businesses. Larger companies plus parking charges might mean that this size of company might be more amenable to a flexible public transport approach.

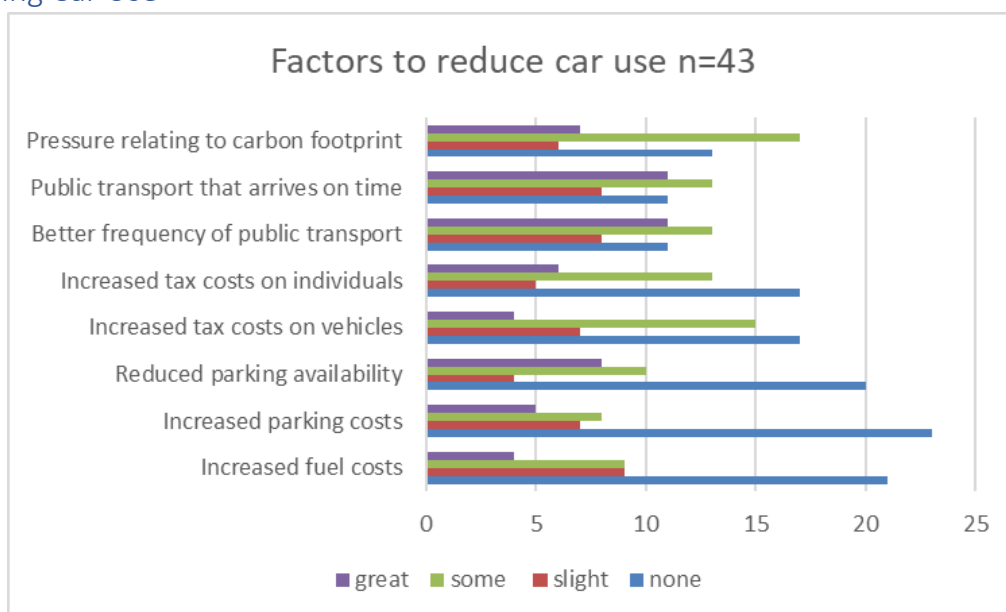
Overall a fifth of businesses have company cars and a quarter restrict these to senior managers or sales staff. 40% of large companies have company cars and 40% restrict to senior staff. Large construction companies also boost the other company vehicles to 44% as these are trades vans.

	Parking on site?	Parking available for all staff?	Parking cost to organisation	Company cars?	Company cars just senior/sales staff?	Other company vehicles for travel to work?	Electric vehicle chargepoints currently	EV chargepoints within next 3 years
Small	77%	100%	0%	8%	15%	8%	8%	15%
Medium	93%	92%	15%	7%	15%	21%	0%	29%
Large	100%	100%	25%	41%	40%	44%	44%	64%

If businesses are wedded firmly to their cars what does the future hold when there are no longer petrol and diesel cars? Overall, 18% of those surveyed had installed electric vehicle chargepoints and a further 19% would do so in the next 3 years taking the total to over a third. From the above table these are predominantly the large businesses. The issue here is that the question was whether chargepoints were installed not how many have been installed and on what basis are they being used or allocated. A large business may have installed one chargepoint for use only by the FD. This does not help the other 20+ employees also arriving by car, but reliant on home charging. Particularly when Western Power research suggests that the power requirements for a regular EV charge are equivalent to an additional household's supply.

## 4. Changing Behaviours

### 4.1 Reducing Car Use



Effect	Increased fuel costs	Increased parking costs	Reduced parking availability	Increased tax costs on vehicles	Increased tax costs on individuals	Better frequency of public transport	Public transport arrives on time	Pressure relating to carbon footprint
Score	0.91	0.88	1.14	1.14	1.20	1.56	1.56	1.42

As in their personal life so in their work life, rural inhabitants are strongly wedded to their car as the prime means of transport. The businesses were asked as organisations what might change this so that cars are used less often. They were asked to rank each factor on a scale of no effect, slight effect, some effect and great effect. The chart shows how the 43 respondents ranked each factor. The length of the blue line of no effect on increased fuel and parking costs and reduced parking

availability shows that most thought they would have no effect on the use of a car for work purposes.

The scale was turned into a score from 0 (none) to 3 (great). Overall increasing costs would only have a slight effect. What has a greater effect is improvements in public transport as an alternative and increasing the pressure related to carbon footprints. Buses need to be more frequent to the available bus stops and to arrive on time. Reducing parking availability or penalising individuals or vehicles through great tax has a slight effect. It is therefore positive awareness and behaviour reinforcement that is likely to be rewarded.

Premise Type	Increased fuel costs	Increased parking costs	Reduced parking availability	Increased tax costs on vehicles	Increased tax costs on individuals	Improved frequency of public transport	Public transport arrives on time	Pressure relating to carbon footprint
Home	0.7	0.9	1.0	0.9	1.0	1.9	1.9	1.0
Business	1.0	1.1	1.3	1.2	1.2	1.8	1.8	1.6
Both	0.9	0.3	0.8	1.2	1.2	0.6	0.7	1.2

When analysed by premise type, it's clear that where the business is either on a business premise or at home that improvements in public transport will have an effect. Whether this means that those with home-working policies already are less convinced of the public transport argument is less clear.

	Increased fuel costs	Increased parking costs	Reduced parking availability	Increased tax costs on vehicles	Increased tax costs on individuals	Improved frequency of public transport	Public transport arrives on time	Pressure relating to carbon footprint
Small	0.7	1.0	1.4	0.9	1.1	1.6	1.6	1.3
Medium	0.6	0.6	0.7	0.8	1.0	1.5	1.4	1.3
Large	1.3	1.1	1.3	1.6	1.5	1.6	1.7	1.6

Splitting the sample by size shows a greater focus on costs by larger businesses.



## 4.2 Working Hours and Time Policies

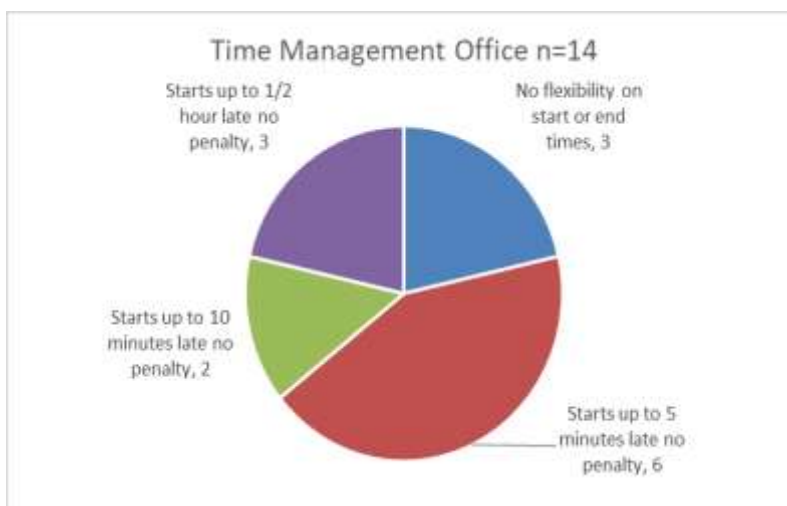
Working Hours	Number of responses
8-4	1
8-5	3
8-7	2
8.30-5	2
9-5	9
10-3	1
10-5	1
24/7	1
9-9	1
14:00 - 00:00	1
24 hours a day, 6 days a week	1
7.30 - 4.30	1
7.30- 5	1
7.30-5.30	1
7am to 10pm. The night porters work 10pm to 7am	1
8 - 4.45 Monday to Thursday and 8 - 2 on Fridays	1
8.30-6	1
8-10.30pm	1
9am-10pm M-F, 10am-2pm S/S	1
Core 9 to 3	1
Core hours are 8.30am to 5.00pm	1
Flexible	1
Mon- Thurs 8.30 - 5 Friday 8.30 - 2	1
Monday-Friday 9am-5.30pm, Saturday 10.30am-1pm	1
Shift work for factory, 8.40-5 for staff	1
Various work patterns - core 7am-3.30pm	1

Only 9 businesses or one fifth of the sample works a standard 9 to 5 working day. Indeed, there are 26 different types of working day represented from the completely flexible to 24/7/365.

The opportunity here is the use of a MaaS system to provide public transport at non-peak times. Buses and taxis are heavily used during and for the school run. From the above they are not used extensively to take people to work.

The threat is that the businesses would not consider changing their hours in order to get their staff to premise at a lower environmental cost until the realities of the 2030 change begin to bite.

The distinctly varied working hours would also impact on the potential aggregations of demand from one area to another in a MaaS system. This could be covered using smaller and more flexible vehicles rather than considering it as a bus journey. Smaller vehicles would also permit small roads to be easily accessed so that workers could go from their most local stop.



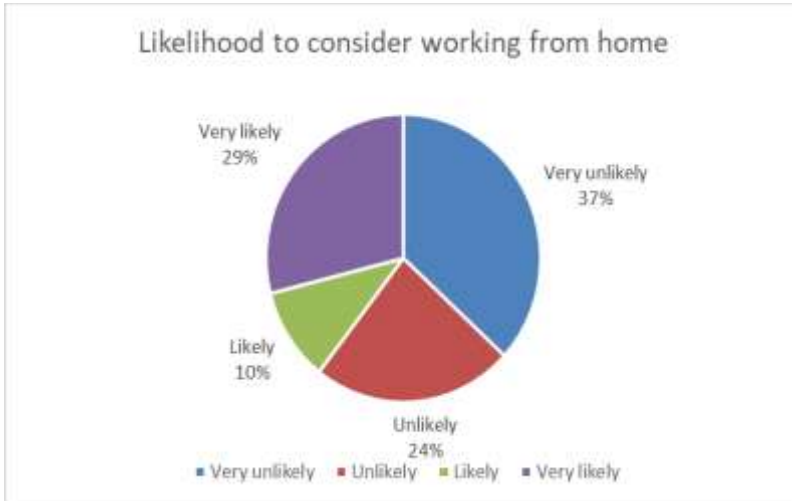
Care should be taken with the analysis of these charts given the small sample sizes. This reflects that for a good proportion of the overall sample, they don't separate staff out into shop floor and office-based staff.

7 respondents said they had zero tolerance on the start or end times for shopfloor staff. A further 4 allowed a 5-minute delay. For two thirds of shopfloor staff, there can be no delay due to late public transport if they wish to avoid a penalty. Driving therefore gives them control of their destiny.

Fewer respondents on time management policies in the office; but it appears true that they are not seen to be so time critical on arriving or departing. Three quarters get some tolerance.

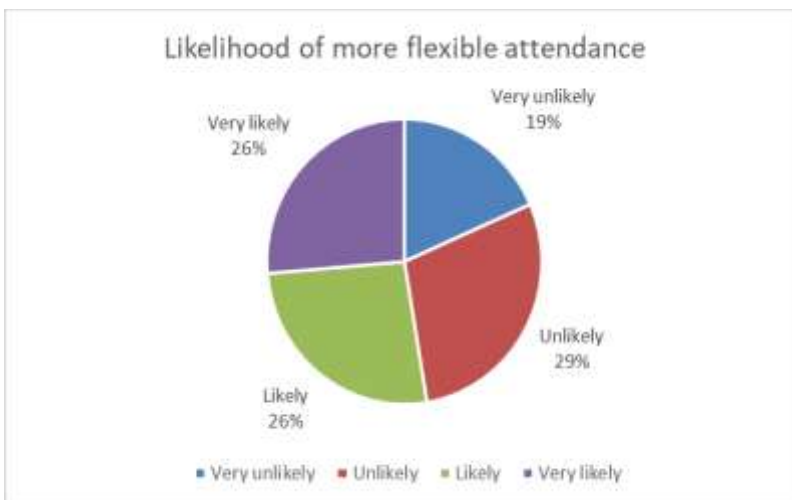
Given a third of the district workforce have shopfloors controllable punctuality is key to MaaS uptake.

### 4.3 Future Policies



For both charts in 4.3, the sample size was 38.

Covid has changed perceptions about working from home or with flexibility. Over 60% of those surveyed, who were not already working from home in normal times, said they were unlikely to consider this. Attendance is therefore essential for District businesses,

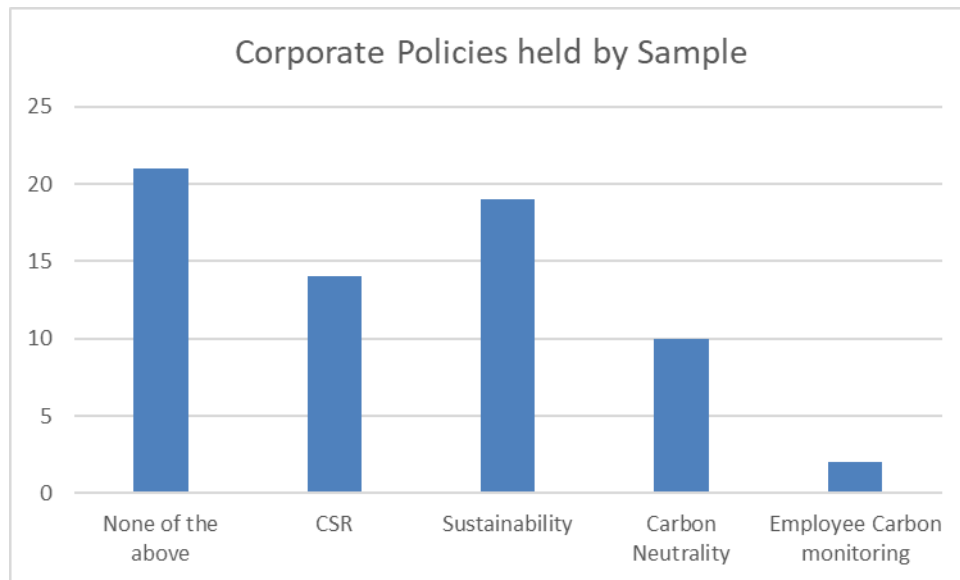


Half of those surveyed would consider more flexible attendance at the place of work. This appears somewhat contrary to the above on first sight. But is explicable, an employee needs to attend but there is less of a requirement to attend for a fixed start or end time.

In other words, “I need you to attend so that I can manage you but my management style is not about clocking in and out unless you’re on the shopfloor”.

More flexibility of attendance provides some potential for MaaS by allowing movement away from the school peak for to and from work transport.

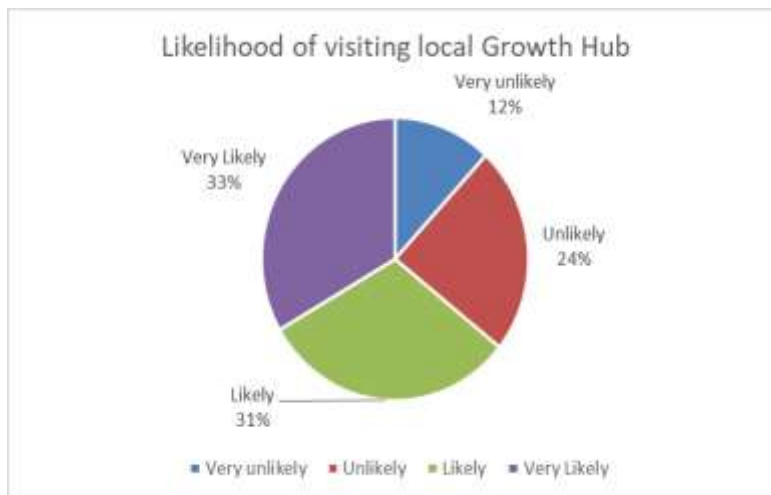
#### 4.4 Other Policies



42% of those surveyed had none of the 4 identified corporate policies. This is partly a function of size which makes the overall statistics less shocking. It also demonstrates how far needs to be travelled to unpick the Climate Emergency. 28% had a company policy on corporate social responsibility and 38% on sustainability. 20% had carbon neutrality policies and 2 went as far as employee carbon monitoring.

Measuring individual employee’s carbon footprints is currently likely to be unattractive to businesses as a lever to enable changes in transport except for the fifth aiming for carbon neutrality.

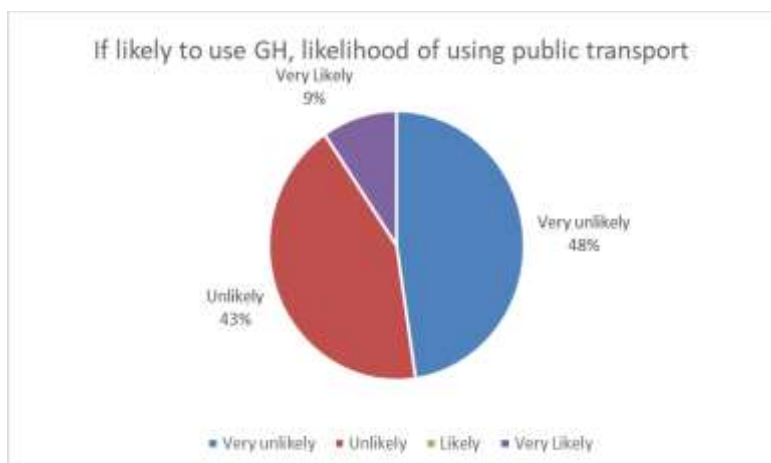
## 5. The Local Growth Hub



In 2021, businesses in the district will have the opportunity to use Growth Hub services from a local Hub sited in Mitcheldean at Vantage Point.

There is the opportunity for a destination-based service to ensure that its location does not deter those, who wish to use its services. Two thirds said they were likely to visit the local hub.

When Mitcheldean businesses were excluded, only 9% said they were likely to use public transport to access the Growth Hub.



The tables below give the reasons why for visiting and for not taking public transport. The first identifies a need to articulate clearly what the Growth Hub can deliver for district businesses. The second demonstrates the challenges and opportunities if a service was available.

### Likelihood of visiting local Growth Hub and reasons for rating

Likely	Good business resource
Likely	If relevant
Likely	May attend on the odd occasion
Unlikely	Events usually happen during business hours so are incompatible with my business. More likely to do online events
Unlikely	Need to understand the benefits to the business.
Unlikely	Without full information of the growth hub's purpose, its difficult to say, but we tend to manage growth strategy in house.
Unlikely	Would we need to ?
Very likely	For help/advice for both of my organisations
Very likely	Growth Hub is an excellent opportunity for all businesses.
Very likely	It is something I think will benefit local businesses, and the wider community as a knock-on effect.
Very likely	Links with our Business Development Department

Very likely	Want to know how it can help my business
Very likely	We are already based there.
Very likely	We have had positive experience with the Growth Hub in Gloucester and this will be closer to our business
Very likely	We haven't in the past, but feel very strongly that local business networking is very important.
Very unlikely	Although we are local, most of our contracts are wide spread
Very unlikely	Don't have enough staff to spare for this

*Those unlikely to use public transport to access the Growth Hub and why*

Unlikely	Because of availability on my route
Unlikely	have own car
Unlikely	Lack of suitable transport
Unlikely	Unavailability of a reliable bus route.
Unlikely	We are not on bus route and would have to walk 2km (no footpath) to nearest stop
Unlikely	unlikely as there is none
Very unlikely	Bream to Mitcheldean not very easy on public transport and I have a bad back
Very unlikely	Convenience
Very unlikely	Convenience
Very unlikely	Convenience and time
Very unlikely	Getting to Mitcheldean from Newent is too difficult. Quicker to drive.
Very unlikely	I would need to take two buses, with large waiting times between them, from Cinderford to Mitcheldean. Then I would be tied to the timetable with no flexibility. This could turn out to be an hour's journey by bus, I could be at the venue in 10 minutes by car. Plus I wouldn't want to be on public transport with the risk of catching Covid.
Very unlikely	Inconvenient
Very unlikely	Most of our team work in disparate parts of the region and further afield. Current public transport to the site is not adequate or wide enough to make this possible.
Very unlikely	no public transport available
Very unlikely	No public transport links from where we live.
Very unlikely	None available.

Very unlikely	Not convenient
Very unlikely	Public transport is unreliable and doesn't run frequently enough - it's not an efficient way of travel!
Very unlikely	Would take far too long

There is a clear need to provide publicly accessible transport services to this new building to ensure that it can deliver the full range of its Growth Hub services to growing and start-up businesses. If there is an economic collapse post-Covid, then it is the Growth Hub through whom services will be channelled for business. The objective for the Growth Hub is easy travel to Mitcheldean which then allows active travel to the building with some tailoring of services to planned events such as networking.

This a similar use case to the new hospital in Cinderford which is both an employer and offers services widely across the District. It too has been challenged on ease of access from all areas using public and private transport.

*The Forest Employers Travel Survey (FETS) was undertaken as part of Rural Technologies Ltd's MaaS: Enabling Rural Geospatial e-Solutions (MERGeS) project funded by the Geospatial Commission's Innovate UK SBRI competition: Using geospatial data to solve transport challenges phase 1 in January to March 2021.*

**Rural Technologies** was created for a simple reason. Its founders have backgrounds in technology and its application to real world problems. The more they looked at the digital world; the more they saw the creation of a two-tiered society resulting from strong urban presumptions.

In a net-zero carbon world, a fundamental challenge for the rural economy will be transport. This affects how society works, lives, plays, studies and ages. The concepts of mobility as a service do not cover rural areas yet underpin future transport use.

**The Geospatial Commission** is an independent, expert committee responsible for setting the UK's geospatial strategy and coordinating public sector geospatial activity. Its aim is to unlock the significant economic, social and environmental opportunities offered by location data and to boost the UK's global geospatial expertise.

The Geospatial Commission has partnered with Innovate UK to create a new £2 million competition which will look at how location data can spark innovation and support the future of mobility for the United Kingdom. Phase 1 consisted of 28 winners who have developed feasibility studies to help create geospatial solutions to our transport challenges and support the future of mobility.

*Please note the Geospatial Commission & Innovate UK do not endorse any of the findings or positions outlined in the work being published by the projects.*

**Thank you's.** The fieldwork for FETS was undertaken by FEP CIC and volunteers using automated software and encouraging participation through phone and networking on behalf of Rural Technologies.

The main analyst and author was Andrew Callard who runs Aimed Business, a management and marketing consultancy and is MD of Rural Technologies Ltd. Following his MBA at Warwick in 1985 he joined a Japanese market research consultancy using quantitative and qualitative methods to analyse the telecoms, office automation and consumer electronics markets in Europe. Subsequently he spent a decade working in Higher and Further Education increasing the volume and quality of applied & blue-sky research and vocational training. Lastly as Deputy Principal (Services for Business) at Hartpury. He has been a board member of the Institute for Research in Applicable Computing at the University of Bedfordshire.

Since 2007 he has worked extensively in the rural economy and assisting businesses based there. He was the first Chairman of FEP and is a member of the CIC Board. With David Trevelyan, he co-founded Rural Technologies Ltd in 2020 to drive the uptake of solutions such as Mobility as a Service tailored to the real needs of the rural economy through innovation. David reviewed this report as part of RTL's QA processes.

**Other reports** from the MERGeS project are the subject of academic publications proposed by WMG of Warwick University on Cyber-security and CCRI on rural transport systems. Further information has been requested by Innovate-UK; and separately by the Organisation for Economic Co-operation and Development (OECD) for a forthcoming report on Innovative Mobility for the Periphery.

