



Improving how spectators access sports stadia - 'destination based' travel planning

Thursday, 5th June

Nicky Ward
Steer Davies Gleave
28-32 Upper Ground
London, SE1 9PD
+44 (0)20 7919 8500

www.steerdaviesgleave.com

 **steer davis gleave**

Thanks for that introduction

I have been asked to present to you today about a very interesting travel planning project that I have been working on behalf of transport for London during the past six months.

Following a very brief introduction to my background and the organisation I work for, my presentation is going to focus on the following:

[Change slides – bullet points of what I am going to cover]

Some of the key themes and lessons learnt that have emerged from my work. I hope that you will be able to take something of relevance with you.... Should this be something you feel good be progressed in your countries.

Contents

- About Steer Davies Gleave
- Background and project context
- Project commission
- Our approach
- Stadia case studies - key characteristics
- Lessons learnt

Need some words on the purpose of the presentation – to accompany this slide

About Steer Davies Gleave

- Our Company is the largest independent transport consultancy in Europe and celebrates its 30th anniversary this year - we employ over 350 consultants in 12 offices around the world
- We offer the full range of transport planning services to Client from the public and private sector and have been market leaders in travel planning for more than 10yrs

Steer Davies Gleave is an international, independent transport consultancy, with their headquarters based in central London.

I am based within the Smarter Choices team at SDG and specialise in the field of travel behavioural change, most notably workplace and school travel planning but more recently in personalised travel planning.

Background to travel planning nationally and locally

- Traditional travel planning focus in UK on schools and workplaces
- A travel plan is
“ a package of actions designed by a workplace, school or other organisation to encourage safe, healthy and sustainable travel options. Travel Plans can improve health and wellbeing, free up car parking spaces, and make a positive contribution to the community and the environment”.
- Transport for London (TfL) very active in travel planning particularly through the ‘A New Way to Work’ programme.
- Destination-based travel planning signals a new direction

In the UK travel planning has traditionally focused on developing and implementing sustainable transport strategies that will deliver a reduction in numbers of car trips to school and workplaces.

To be sure that everyone is clear what a travel plan is.....*Slide [definition of travel plan]*

TfL's already has a well-established travel plan 'offer' for workplace organisations. Through TfL's New Way to Work 'Corporate' offer large organisations with over 250 employees receive free help and advice with the development of their travel plans from a transport consultant. Also receive quick win funding which to be focused on a particular mode of transport which has the potential to achieve the most behaviour change.

'Enterprise' offers, workplace organisations of 20 or more employees are encouraged and incentivised to develop, implement and monitor travel plans.

TfL wish to extend their corporate programme to sectors whereby the significant proportion of travel movements to/from a site are those associated with visitors i.e. DBTPs. In order for this to work effectively has commissioned consultants to explore the most effective way of engaging and working with the different types of destinations.

Project Commission

- Steer Davies Gleave commissioned to explore travel planning with three of the following key types of destinations identified by TfL:
 - Retail
 - Universities
 - Stadia
 - Leisure Centres
 - Parks and Natural Spaces
 - Rail Stations
 - Tourist Attractions
- Support the development of travel plans at three sites in each Package with a view to helping TfL learning from the experience
- Produce a lessons learnt paper for each Package

Destination based travel planning signals a new direction for this area of work and has been created by a recognition that major destinations which generate significant levels of travel outside the workplace area is an area that needs to be addressed.. TfL commissioned 3 consultancies to a project to research how to work with 7 key types of destinations.

[List bullet points from slide]

Support the development of exemplar travel plans at two or three sites in each Package, following as closely as possible Transport for London's (TfL's) New Way to Work 'Corporate' package. Produce a lessons learnt paper for the stadia Package.

Why stadia?

- Significant trip generation both within and into Greater London
 - Travel outside typical peak hours
- 'Open' communities (however high proportion of spectators are season-ticket holders) and unidentifiable visitors
- Spectator travel has changed beyond recognition over past 30 years
 - Socio-demographics supporters e.g. 2001 survey of Chelsea supporters showed only 38% earn below the £30k average London salary
 - Large catchment areas with many Premiership supporters travelling to home games from overseas:
- Growing recognition of environmental and Corporate Social Responsibility
- Importance of maintaining and growing home support

The nature of DBTPs mean that they pose a number of challenges not typically associated with Workplace Travel Plans (WTPs). For example:

Trip generation and Time of travel - In many cases, people will be travelling outside of 'typical' peak hours to 'Destination-Based' sites, at times when public transport may be less crowded but run less frequently. Alternatives to the car may therefore seem less attractive/viable to those attending visitor-focussed destinations compared to people travelling to their place of work.

According to the National Fan survey – 46% own car and 13% lift (59%)

Identifying visitors using Destination-Based site – Whereas WTPs are largely associated with 'closed' communities whereby the names and contact details of staff members are known and consequently the 'target' audience is easy to reach. However, in the case of stadia sites a proportion of visitors, in varying degrees, will be unidentifiable (and thus not contactable directly) prior to their arrival at the site.

Catchment and trip starting point - Catchment areas for some Destination-Based sites will be significantly larger than for a typical workplace. This itself has a number of implications:

In a number of cases, people may not be starting their trip from home as they would typically do for a work trip. Rather, they may be setting out from, for example, a Hotel. The iTRACE survey will need to take account of this; it is likely that the survey will need to collect information re: home location as well as the start-point for the journey to the site. Journeys may also be different for midweek games, Sunday and Saturday matches.

There will be more air travel associated with some of the Destination-Based sites compared to workplace organisations. This will also need to be addressed through the survey.

According to the National Fan survey 2007/08):

46% own car and 13% lift (59%)

28% PT

5% walk or cycle

3% fly

5% other (supporters coach, van/mini bus, P&R)

Our approach

- I Stage One:
 - Stadia engagement - Crystal Palace FC, Fulham FC, Harlequins FC (Rugby League and Union)
 - Case study interviews
- I Stage Two:
 - Site assessments: to establish accessibility and barriers to use of sustainable transport
 - Spectator surveys: Online and face-to-face
- I Stage Three:
 - Travel plan development - based on TfL's Corporate offer
 - 'Quick win' funding
- I Stage Four:
 - Lessons learnt report

Selecting the stadiums – might be receptive to travel planning, sufficient capacity, regular games e.g. Lords Cricket ground, transport accessibility, not going through relocation of planning applications for re-development, existing transport issues, committed club or an environmental/community bent.

3 case study stadia with travel plans – in this case all three as part of the planning process. Choose them to find out any lessons learnt' from their experiences, their methods for reaching 'visitors'

Case-study interviews

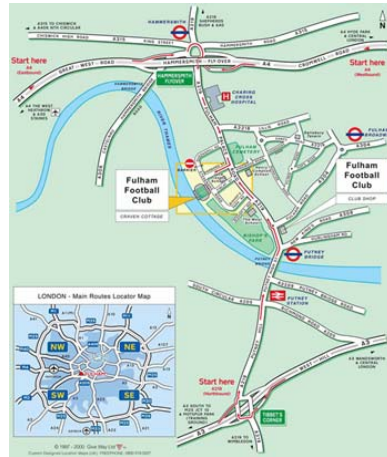
- Emirates Stadium - Arsenal Football Club
- Swansea stadium - Swansea City FC and Ospreys Rugby Union
- Ricoh Arena - Coventry City FC



Craven Cottage Stadium- Fulham Football Club



- Located on River Thames in LB Hammersmith & Fulham (West London)
- Barclays Premiership
- The stadium capacity of 26,600, average attendance 23,774
- Well served by public transport
- No on-site parking
- On match days, on road parking is limited to a maximum stay of one hour between 9.00-21.30 Mon-Fri and 9.00-17.00 on Saturdays.
- No cycle parking



Selhurst Park Stadium - Crystal Palace Football Club

- Located to the north of LB of Croydon (South London)
- Stadium capacity of 26,309 with the average gate for the last season at 16,031
- Coca-Cola Championship division
- 250 parking spaces restricted to employees and VIPs on match days
- Free on-street parking
- No cycle parking
- 3 rail stations and good bus links
- Significant local catchment



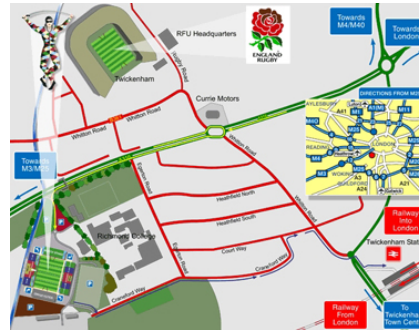
Selhurst Park



The Twickenham Stoop Stadium-Harlequins Rugby



- Located in LB Richmond (South West London)
- Stadium Capacity 12, 500
- Rugby League and Union
- Poor bus service provision, and infrequent rail services to Twickenham Station (Sundays)
- 12 'Sheffield style' cycle racks
- 500 parking spaces, incrementally lower rates for car sharers
- Overspill car park and free on-site parking
- Local catchment - Rugby Union
- Wider catchment - Rugby League



The Stoop



Club motivations for participation

- Local traffic and parking issues
- Relationships with relevant stakeholders
- Increasing attendance levels
- Capturing the tourist market
- Pre and post-game entertainment
- Environmental sustainability (www.CarbonFootyprint.com)
- Quick win funding

Site assessments

- An adapted TfL site audit proforma was used to complete a site audit for each stadium.
 - Key stadium information
 - Roles & responsibilities (in relation to travel plan development and implementation)
 - On and off-site accessibility and provision for car use, walking, cycling, motorcycles, public transport, coach and taxi travel; and
 - Visitor travel information.

Selecting the stadiums – might be receptive to travel planning, sufficient capacity, regular games e.g. Lords Cricket ground, transport accessibility, not going through relocation of planning applications for re-development, existing transport issues, committed club or an environmental/community bent.

3 case study stadia with travel plans – in this case all three as part of the planning process. Choose them to find out any lessons learnt' from their experiences, their methods for reaching 'visitors'

Surveys

- Face to face and online surveys were completed. Main focus on home supporters.
- Issues to consider:
 - Role of Club in promotion and support
 - Mix of home and away supporters
 - Online and face to face
 - Length and content of questionnaire
 - Typical games to be surveyed - avoid local derbies or cup ties between different leagues - atypical travel
 - Any station/road closures, problems with the underground
 - Prizes
 - Planned road and rail engineering works, particularly on Sundays

Also need to consider the weather too

Spectator travel surveys - the results

Club	Supporters	Response rate	Number of responses
Fulham FC	Home & away	3.1%	Online: 256 F2F: 517 (33% away supporters)
Crystal Palace FC	Home	5.5%	Online: 509 F2F: 890
Harlequins FC League	Home & away	11.3%	Online: 393 F2F: 137
Harlequins FC Union	Home & away	6.8%	Online: 463 F2F: 287



ECOMMS June 2008

 steer davis gleave

Response rates for clubs:

Harlequins L: 11.3% (attendance 4,500 largest of the season)

Tottenham – 5.6%: Online survey

Landsdowne Road: 11% (self completion questionnaires in programmes, all supporters) Football international

13% Six nations (self completion, all supporters)

Arsenal: 13% self completion

Calculation

In absence of better data, we divided the number of respondents per match by the official number of match attendees.

I would think it's better to speak about % of the population surveyed as not all people attending the game were invited to participate in the survey.

To calculate the response rate one would need to have an idea of the number of those approached— either by face to face surveyors or sent the online survey by email. The Harlequins surveys were apparently posted on the website so we have no idea how many people viewed and were eligible to complete the survey.

At a minimum, information on the number of home spectators and number of away spectators attending the surveyed match would be most important. If we go down the path of only surveying home supporters, total attendance figures aren't too helpful.

Games Surveyed:

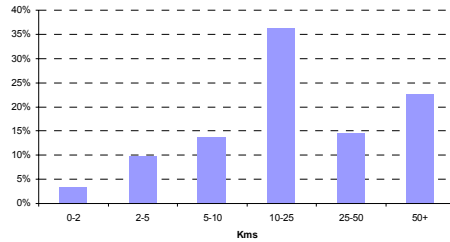
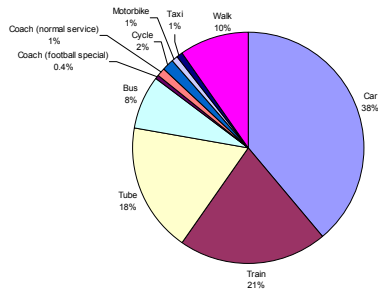
Fulham Football Club: ONE GAME: Fulham v Liverpool on Saturday 19th April 2008

Harlequins Rugby League: ONE GAME Harlequins v Hull Kingston Rovers on Saturday 5th April 2008

Harlequins Rugby Union: TWO GAMES Harlequins v Newcastle Falcons on Saturday 29th March and Newcastle v Sale Sharks on Sunday 4th May 2008

Crystal Palace Football Club: TWO GAMES Crystal Palace v Cardiff on Tuesday 4th March and Crystal Palace v Barnsley Saturday 15th March.

Fulham FC - Journey mode and distance



ECOMMS June 2008

 steer davis gleave

38% by car (much lower than national average for premiership games)
10% walking and 2% cycling (much higher than average)

According to the National Fan survey 2007/08:

46% own car and 13% lift (59%)

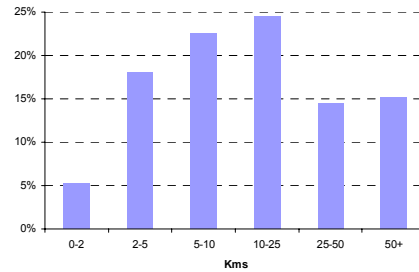
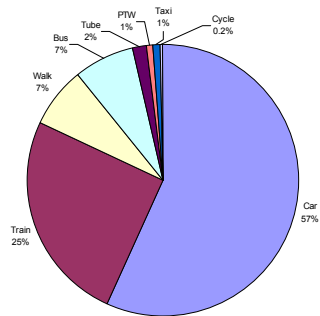
28% PT

5% walk or cycle

3% fly

5% other (supporters coach, van/mini bus, P&R)

Crystal Palace FC - Journey mode and distance

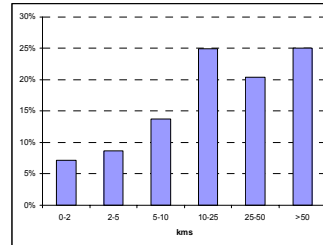
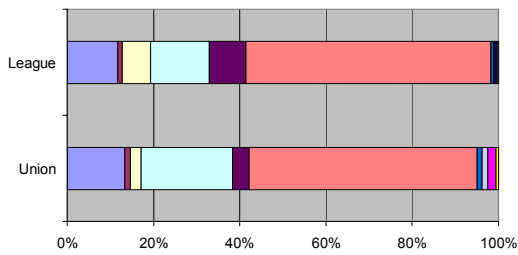


Large percentage by car 57%

7% walking

7% bus

Harlequins FC - League and Union



Generic issues/barriers

- Communication with public transport providers
- Inconvenient/irregular public transport options
- Habit and perception
- Lack of cycle parking provision and fear of cycling
- Time of mid-week games
- Free and available parking - incentives for season ticket holders

Encouraging behaviour change - Walk, Cycle and Other

I Fulham

- Secure cycle parking
- Cycle information - routes and local facilities

I Crystal Palace

- Secure cycle parking
- Cycle information - routes and local facilities
- Review of walk routes between stadium and local amenities

I Harlequins

- Provision of covered and secure and well signed cycle parking at key locations within the stadium grounds
- Update to the 'Directions to Harlequins' guide with sustainable travel modes given greatest prominence
- Re-introduction of graduated discounted car parking sharing car sharers

Encouraging behaviour change - public transport

I Fulham

- cheaper fares
- more frequent services.
- Less crowded underground services

I Crystal Palace

- Improvements to train services
- Discounted/subsidised tickets
- More reliable/frequent services scored the best

I Harlequins

- Better information about rail timetable and rail engineering works
- Improve pedestrian signing between local major public transport nodes and the stadium
- Partnership working with transport operators on better service provision

Lessons learnt

- Choosing the appropriate stadium
- Recognising club specific issues and priorities
- Stadium engagement - communication and commitment
- Undertaking appropriate surveys
- Identifying appropriate objectives, targets & action plan
- Process management
- Ensuring successful travel plan development

Further information

- Nicky Ward, Principal Consultant
- Nicky.ward@sdgworld.net
- www.steerdaviesgleave.com
- 020 7919 8500

Thank you

ECOMMS June 2008

 steer davis gleave