



**TRICS Consortium Limited**  
**Data Collection Note for TRICS SAM Clients and Site Contacts**

**January 2024**

The purpose of this document is to assist TRICS clients and survey site operators, with regards to the supplementary information that is required for a TRICS survey report to be produced. **Blue text within the document is used to highlight particularly important information.**

Part of the process of TRICS surveys, in addition to the actual survey count itself, is the supply of supplementary site information, that is necessary to populate the TRICS database, **and for the resulting TRICS survey results to be fully validated and therefore considered to be TRICS Compliant.** Our TRICS-approved data collection contractors work with our clients and site operators to obtain this information.

This note provides our clients and site operators with clear and comprehensive guidance on the supporting information that they will be asked to supply, providing the necessary definitions and descriptions of each separate potential item of data. Data requirements differ by development type, and this note covers everything that our clients and site contacts will need.

**One thing that applies to all developments, is that all data supplied by clients and site operators to our contractors must be correct for the day on which the actual survey count at the site took place. This theme runs through all the data, so it should be something that everyone is aware of from the outset.**

The following sections of this note break down the data required for the different sections contained within our TRICS data collection forms. We request supporting information with regards to the development itself (Development Details), on-site parking (Parking Details), and, where applicable, the site’s Travel Plan (Travel Plan Details – **This only applies to specifically commissioned SAM surveys**). In all cases, the supporting data should be forwarded to our data collection contractor, and not directly to TRICS, and the contractor will forward the request detailing each item of data required on a site-by-site basis.

**Development Details (Residential Developments)**

This information is required for all residential surveys. **It is important to note that for residential sites, as well as the data being applicable to the day that the survey took place, it is also vital that the data represents only the fully constructed and occupied part of the residential development, with all non-occupied dwellings and areas of the site still under construction at the time of the survey excluded from all figures.**

Data Item	Unit	Description/Definition
Site area	Hectares	The two-dimensional area of the site, up to its outermost boundaries, but excluding all parts of the site under construction or unoccupied at the time of the survey (so just the fully occupied element of the site plus any natural features that form part of the site within its outermost boundaries).
Site area excluding publicly accessible features	Hectares	The above, but further excluding any publicly accessible features. These features include publicly accessible playgrounds or recreational areas, internal public footpaths (but not standard pavements), and any internal publicly accessible woodlands, ponds, lakes or similar. Any internal parking space accessible to the public (for example marked visitor spaces or communal parking areas that are not restricted to residents through signage) are considered publicly accessible, whilst all residents’ driveways, individually allocated bays and garages are considered not publicly accessible. In cases of gated residential

		developments that are not accessible to the public, this figure should equal the site area figure.
Year of opening	Year	The year of first occupation at the site.
Occupied dwellings	Number	The number of occupied dwellings at the time of the survey.
Unoccupied dwellings	Number	The number of unoccupied (but constructed) dwellings at the time of the survey.
Privately owned dwellings	Number	The number of privately owned (and occupied) dwellings at the time of the survey. The TRICS definition of a privately owned dwelling is a dwelling at which residents have any degree of equity, or a dwelling that is owned by a private landlord and rented at market rates.
Non-privately owned dwellings	Number	The number of non-privately owned (and occupied) dwellings at the time of the survey. The TRICS definition of a non-privately owned dwelling is a dwelling where its occupants have no degree of equity. Examples include social rent or units fully owned by a Housing Association, but dwellings owned by a private landlord and rented out at market rates are considered privately owned.
Dwellings with 1 bedroom	Number	The number of occupied dwellings (at the time of the survey) with 1 bedroom (regardless of private/non-private ownership).
Dwellings with 2 bedrooms	Number	The number of occupied dwellings (at the time of the survey) with 2 bedrooms (regardless of private/non-private ownership).
Dwellings with 3 bedrooms	Number	The number of occupied dwellings (at the time of the survey) with 3 bedrooms (regardless of private/non-private ownership).
Dwellings with 4 bedrooms	Number	The number of occupied dwellings (at the time of the survey) with 4 bedrooms (regardless of private/non-private ownership).
Dwellings with 5 bedrooms	Number	The number of occupied dwellings (at the time of the survey) with 5 bedrooms (regardless of private/non-private ownership).
Dwellings with 6 bedrooms	Number	The number of occupied dwellings (at the time of the survey) with 6 bedrooms (regardless of private/non-private ownership).

Data Item	Privately Owned	Non-Privately Owned	Description/Definition
Detached houses	Number	Number	The number of occupied detached houses at the time of the survey, split by privately and non-privately owned dwellings.
Semi-detached houses	Number	Number	The number of occupied semi-detached houses at the time of the survey, split by privately and non-privately owned dwellings.
Terraced houses	Number	Number	The number of occupied terraced houses at the time of the survey, split by privately and non-privately owned dwellings.
Bungalows	Number	Number	The number of occupied bungalows at the time of the survey, split by privately and non-privately owned dwellings.
Flats (in houses)	Number	Number	The number of occupied flats (in split houses) at the time of the survey, split by privately and non-privately owned dwellings.
Flats (in blocks)	Number	Number	The number of occupied flats or apartments (in blocks) at the time of the survey, split by privately and non-privately owned dwellings.
Town houses	Number	Number	The number of occupied town houses at the time of the survey, split by privately and non-privately owned dwellings.
Other (to be specified)	Number	Number	The number of occupied dwellings of any other specified type at the time of the survey, split by privately and non-privately owned dwellings.

## Development Details (Non-Residential Developments)

The development information required for non-residential sites varies depending on the development type, but the key data items throughout the TRICS database are listed below, along with their descriptions and definitions. **The following list is not exhaustive, and details of the exact information required per site will be requested by our data collection contractors (as it can differ by development type – only a few items per site will be required)**, but the list below covers the data items for non-residential sites where descriptions and definitions are considered the most important to be understood. **It is also important to note that, in the same way as residential developments, all data supplied needs to be valid for the day on which the survey took place.**

Data Item	Unit	Description/Definition
Site Area	Hectares	The two-dimensional area of the site, up to its outermost boundaries, but excluding all parts of the site not in operation at the time of the survey.
Year of opening	Year	The year when the site first functioned in its current development type.
Gross floor area	Square Metres	The total internal floor area (at the time of the survey) of all floors within the site building(s), including mezzanine floors. There are exceptions to this (car show rooms, garden centres, builders' merchants, warehousing, and DIY superstores (with garden centres)), where active external retail and storage floor area is also included. Internal floor areas should include all areas accessible to staff and visitors (e.g. office space, canteens, storage areas, toilets, etc), but will exclude service areas (e.g., lift shafts, stairwells, plant, staff and visitor car parks, etc).
Retail floor area	Square Metres	The total internal floor area (at the time of the survey) of all floors within the site building(s) which are directly accessible to customers (for example the shop floor of a superstore and other customer facilities, but not storage areas or staff facilities etc), including mezzanine floors. There are some exceptions to this (car show rooms, garden centres, and DIY superstores (with garden centres)), where active external retail floor area is also included.
Gross floor area not in use	Square Metres	The amount of gross floor area (which is itself defined in the GFA item above), that was not in operation at the time of the survey.
GFA (site building)	Square Metres	This is specific to petrol filling stations and is defined as the internal floor area of a PFS building (i.e., its associated shop).
RFA (non-food)	Square Metres	This is specific to food stores and is defined as the amount of retail floor area (which is itself defined in the RFA item above), that was dedicated to specific non-food areas within a site. For example, clothing, entertainment, and electronic/mobile phone sections of a supermarket. Note that this figure will not include more "standard" supermarket aisles such as toiletries, greetings cards and magazines, etc.
Mezzanine gross floor area	Square Metres	The amount of gross floor area (which is itself defined in the GFA item above) in operation on mezzanine floors of the development at the time of the survey.
Mezzanine retail floor area	Square Metres	The amount of retail floor area (which is itself defined in the RFA item above) in operation on mezzanine floors of the development at the time of the survey.
Total employees	Number	The total number of employees registered with the site at the time of the survey. This should be the total number employed, and not the number who were working specifically on the day of the survey.
Full time employees	Number	Of the above total number of employees registered at the site at the time of the survey, the total number who work full time.

Part time employees	Number	Of the above total number of employees registered at the site at the time of the survey, the total number who work part time.
Approximate percentage of total employees working standard 9-5 hours or similar	Percent	The percentage of the total number of employees registered at the site at the time of the survey, who are considered to work standard 0900-1700 hours or similar (for example 0800-1600, 0700-1700, 0900-1900, etc). A reasonable estimate of what could be considered a standard “working day” with the level of flexibility indicated.
Approximate percentage of total employees working from home (any amount)	Percent	The percentage of the total number of employees registered at the site at the time of the survey, who work from home for any length of time during their working week. This should not be confused with the percentage of overall working time that takes place at home, it should just show the percentage of staff that undertake any amount of homeworking.
Number of pupils	Number	The total number of pupils registered at a school at the time of the survey. This should be the total number registered, and not the number who attended the site on the day of the survey.
Number of students	Number	The total number of students registered at a university/college campus at the time of the survey. This should be the total number registered, and not the number who attended the site on the day of the survey.
Number of beds	Number	The total number of beds present at a hospital (or the care element of a retirement village) at the time of the survey, including all departments.
Number of residents	Number	The total number of residents at a care home or a retirement village site at the time of the survey (not to be confused with the total residential capacity of the site).
Number of doctors	Number	For GP surgeries, the number of doctors that were registered as being employed at the site at the time of the survey. Note that this should be the total number who work at the site, and not the number physically present at the site on the day of the survey.
Number of seats	Number	The total number of seats (both internal and external) that can be used by people visiting a cinema, pub, café, drive-through or restaurant (at the time of the survey).
Swimming pool area	Square Metres	The area of the main swimming pool at a leisure centre site. Note this will exclude any smaller teaching/child pools.
Number of units	Number	The number of building units operational at a site at the time of the survey. Note that this should exclude empty unoccupied units.
Number of units (holiday accommodation sites)	Number	The total number of holiday accommodation units present at a site at the time of the survey. This means the combined total of camping pitches, touring pitches, fixed caravans, chalets, camping pods, etc. This should be the total number at the site, and not the total occupied on the day of the survey.

## **Parking Details (Residential Developments)**

This information is required for all residential surveys. Note that in some cases all of this information may be able to be collected on-site by the data collection contractor undertaking the survey, whilst at other times assistance may be required from the client/site operator, so all of the information is listed below for reference.

**It is important to note that for residential sites, as well as the data being applicable to the day that the survey took place, it is also vital that only the parking spaces at the fully constructed and occupied parts of the residential development are included, with all non-occupied areas and areas of the site still under construction at the time of the survey excluded from all figures.**

<b>Data Item</b>	<b>Unit</b>	<b>Description/Definition</b>
Total parking spaces	Number	The total number of parking spaces at the time of the survey, only including the fully occupied parts of a residential development.
On-street parking spaces	Number	The total number of non-allocated on-street parking spaces at the time of the survey, only including the fully occupied parts of a residential development. These could consist of marked out (but non-allocated) on-street bays, or areas along the site's roads that may not be marked out but where on-street parking still takes place. Sometimes an estimate of this may be necessary.
Driveways	Number	The total number of driveways at the time of the survey, only including the fully occupied parts of a residential development. Note that driveways with the capacity for two vehicles will count as two driveways.
Garages	Number	The total number of garages at the time of the survey, only including the fully occupied parts of a residential development. Note that garages with the capacity for two vehicles will count as two garages.
Communal parking spaces	Number	The total number of non-allocated off-street communal parking bays at the time of the survey, only including the fully occupied parts of a residential development. If any communal parking areas are unmarked, a total estimate of the number of vehicles that can park at any one time in such areas will be fine. This figure should include any spaces marked as being for visitors.
Allocated spaces	Number	The total number of marked parking spaces at the time of the survey that are specifically allocated to a dwelling, only including the fully occupied parts of a residential development. This figure should exclude garages and driveways. Such spaces are often numbered and tend to be off-street, but if any allocated and numbered spaces are on-street, then these should be recorded as allocated spaces and not on-street spaces. This figure should also exclude any parking spaces marked as being for visitors.
Electric vehicle charging bays	Number	The total number of on-site electric vehicle charging spaces at the time of the survey (so the number of electric vehicles that can be charged at any one time). This figure should not be included in any other parking space type but should contribute to the total parking spaces figure.
Is this site associated with a car club?	Yes/No	If the site has any specific arrangement with a car club, either formal or informal, then this should be marked as "yes".

## **Parking Details (Non-Residential Developments)**

This information is required for all non-residential surveys, except for a small number of development types for which parking information is not collected. As with residential developments, note that in some cases all of this information may be able to be collected on-site by the data collection contractor undertaking the survey, whilst at other times assistance may be required from the client/site operator, so all of the information is listed below for reference.

**It is important to note that, as with residential sites, all parking space data for non-residential developments needs to apply to the day that the survey took place.**

<b>Data Item</b>	<b>Unit</b>	<b>Description/Definition</b>
Total parking spaces	Number	The total number of on-site parking spaces at the time of the survey (excludes pedal cycle spaces - see below).
Employee spaces	Number	The total number of on-site employee spaces at the time of the survey (excludes electronic vehicle charging points – see below).
Disabled spaces	Number	The total number of on-site disabled spaces at the time of the survey.
Visitor/Customer spaces	Number	The total number of on-site visitor/customer spaces at the time of the survey (excludes electronic vehicle charging points – see below).
OGV parking bays	Number	The total number of on-site heavy goods vehicle parking spaces at the time of the survey. Separate from loading bays (see below), so these are more parking spaces for large vehicles.
Cycle racks	Number	The total number of cycle parking spaces at the time of the survey (so the total number of cycles that can park at the site at any one time). Note that this number is not included in the Total Parking Spaces figure (see above).
OGV loading bays	Number	The total number of on-site heavy goods loading bays at the time of the survey. For example, shutter bays into loading areas within buildings. Separate from parking spaces for large vehicles (see above).
Parent & Toddler spaces	Number	The total number of on-site parent & toddler spaces at the time of the survey.
Motorcycle spaces	Number	The total number of on-site disabled spaces at the time of the survey.
Electric vehicle charging bays	Number	The total number of on-site electric vehicle charging spaces at the time of the survey (so the number of electric vehicles that can be charged at any one time). This figure should not be included in any other parking space type but should contribute to the total parking spaces figure.
Is this site associated with a car club? (only applies to some development types)	Yes/No	If the site has any specific arrangement with a car club, either formal or informal, then this should be marked as “yes”.

An exception to this is when parking space information is being supplied for car show room sites. **It should be noted that when supplying parking information for this development type, the figures should exclude all vehicle display spaces, so the data supplied should only include spaces that are for the parking space types detailed above.**

## **Travel Plan Details (for commissioned SAM surveys only)**

Specifically commissioned TRICS Standardised Assessment Methodology (SAM) surveys, at developments where a travel plan was operational at the time of the survey, will require the Travel Plan data section to be completed, and the definitions of the various sub-sections of this are detailed in the various tables below.

The travel plan data section in TRICS is split between residential and non-residential sites, and this is reflected in the separation of residential and non-residential tables below.

It should also be noted that there may be some elements shown in the tables below that are present at or around a development at the time of a SAM survey, but which may not actually be considered an element of the site's travel plan. An example of this may be a local cycle network near a site which links to local residential areas. The tables below include the identification of such elements to make this distinction.

There may, of course, also be other elements of a site's travel plan that are not covered by the elements listed in the tables below. There are comment fields in the tables below that allow this additional information to be supplied. **SAM clients could also supply a list of these additional travel plan elements as a straightforward bullet point summary, should these elements be numerous, so that the TRICS database can be annotated accordingly, and the development's travel plan therefore represented in the most complete and correct way.**

## Travel Plan Section (Residential Developments)

The following Travel Plan sub-sections (with headings in red) are required for SAM surveys at residential developments.

### Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Main Details

Data Item	Unit	Description/Definition
Date of initial travel plan implementation	Month & Year	The month and year when the first travel plan at the development went live. This means the date when any of the elements of the first travel plan became active (or when active on-site work on them started).
Date of current travel plan implementation	Month & Year	The month and year when the current travel plan at the development went live.
Travel plan accreditation	Yes/No	Has the travel plan been accredited by a recognised organisation?
Accrediting organisation	Name	If YES to the above, what is the name of the accrediting organisation?
Previous non-TRICS surveys at the development	Yes/No	Have any other non-TRICS surveys been undertaken at the development for travel plan purposes?
Travel plan type	Compulsory/ Voluntary/ Framework/ Other (specify)	State the type of travel plan in operation at the site from the available options. If Other, then state what this type is.
Local authority 'bond' condition	Yes/No	Has the local authority placed a 'bond' condition to ensure travel plan targets are met?
Travel plan co-ordinator	Yes/No	Is there a Travel Plan Co-Ordinator – a member of staff whose job it is to manage the implementation of the travel plan?
Travel plan co-ordinator work status	Full time/Part time	If YES to the above, does the Travel Plan Co-Ordinator work on the travel plan full time or part time?
Annual travel plan budget	Yes/No	Is there an annual travel plan budget allocated for this site (the budget amount is not required)?
Travel plan developer initiatives	Text descriptions	List any developer initiatives (as per planning agreements: for example, local infrastructure, improvements to local public transport services, etc).

## Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Travel Plan Objectives & Targets

Data Item	Unit	Description/Definition
Travel plan target groups	Target group/ Not a target Group, plus Text description (if applicable)	State whether following groups of people are targets of the travel plan or not targets of the travel plan: <ul style="list-style-type: none"> <li>Residents</li> <li>Visitors</li> <li>All Site Users</li> <li>Other (Specify)</li> </ul>
Pre-travel plan mode split obtained?	Yes/No	Was modal split data obtained before the introduction of the travel plan?
Date when pre-travel plan mode split data obtained	Month & Year	If YES to the above, state the month and year when the pre-travel plan mode split data was obtained. This should be the specific date when the information was obtained, and not the date, for example, of the release of Census information.
Pre-travel plan mode split data percentages	Series of percentages	Provide the breakdown of the pre-travel plan mode split data into percentages, split by the following modes: <ul style="list-style-type: none"> <li>Vehicle Occupants (includes both drivers and passengers of all vehicle types apart from public transport).</li> <li>Cyclists</li> <li>Public Transport Users (includes users of all forms of public transport combined).</li> <li>Pedestrians</li> <li>Other</li> </ul> <p>If the percentages do not add up to 100%, this may be because the mode splits were not separately defined as per the points above, in which case further information on what the splits were should be supplied (for example, a split may be 'pedestrians and cyclists' without any split between the two being available).</p>
Source of pre-travel plan mode split data	Multiple Choice	What was the source of the pre-travel plan mode split data percentages? One of the following options should be selected. <ul style="list-style-type: none"> <li>2011 Census</li> <li>2021 Census</li> <li>TRICS analysis</li> <li>Previous survey at development</li> </ul>
Travel plan mode split targets identified?	Yes/No	Does the travel plan include any mode split targets?
Date when travel plan mode split targets were identified	Month & Year	If YES to the above, state the month and year when the travel plan mode split targets were identified.
Year of the travel plan that the mode split targets represent	Number	If YES to the above, which year in the life of the travel plan do the mode split targets represent? Indicate the year in terms of the life of the travel plan (for example 'Year 5') and not the calendar year.
Travel plan mode split target percentages	Series of percentages	Provide the breakdown of the travel plan mode split targets in percentages, split by the following modes:



		<ul style="list-style-type: none"> <li>• Vehicle Occupants (includes both drivers and passengers of all vehicle types apart from public transport).</li> <li>• Cyclists</li> <li>• Public Transport Users (includes users of all forms of public transport combined).</li> <li>• Pedestrians</li> <li>• Other</li> </ul> <p>If the percentages do not add up to 100%, this may be because the mode splits were not separately defined as per the points above, in which case further information on what the splits were should be supplied (for example, a split may be 'pedestrians and cyclists' without any split between the two being available).</p>
Main objective/target of the travel plan	Text descriptions	What is the main objective/target of the travel plan? This should be the key 'headline' objective/target.
Specific individual targets of the travel plan	Text descriptions	What are the specific individual objectives/targets of the travel plan? If there are numerous objectives/targets, then please supply a list as a series of bullet points. Such objectives/targets may relate to shifts in transport modes as well as other types.



**Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Changes in Site Environment & Circumstances**

Data Item	Unit	Description/Definition
Change in local parking restrictions	Yes/No plus text descriptions	Has there been a change in local parking restrictions within walking distance of the site? These would be changes that have occurred within the last few years rather than changes that took place long ago.
Increase/decrease in the provision of sustainable transport	Yes/No plus text descriptions	Has there been an increase or decrease in the provision of sustainable transport to and from the local area where the site is located (this could include new footways/cycleways, changes to public transport frequencies and services, a new local transport hub, etc.)? These would be changes that have occurred within the last few years rather than changes that took place long ago.
Local or environmental factors that may have affected quantities and methods of travel.	Yes/No plus text descriptions	Are there any local or environmental factors that may have affected quantities and methods of travel to and from the site, especially since a previous survey at the site (if applicable). Examples might include new local infrastructure, changes to local routes, pedestrianisation of the local area, etc.)? These would be changes that have occurred within the last few years rather than changes that took place long ago.
Site-specific factors that may have affected quantities and methods of travel	Yes/No plus text descriptions	Are there any site-specific factors that may have affected quantities and methods of travel to and from the site, especially since a previous survey at the site (if applicable)? Examples might include changes to site accesses, changes and additions to site facilities, on-site parking arrangements, etc.) These would be changes that have occurred within the last few years rather than changes that took place long ago.

## Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Cycling

Data Item	Unit	Description/Definition
Cycle sheds for houses	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were cycle sheds provided for houses at the development?  If YES, provide the month and year when these were first available, and provide details of their quantity and locations within the site.
Covered cycle compound for apartment blocks	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were any covered cycle compounds provided for apartment blocks at the development?  If YES, provide the month and year when these were first available, and provide details of the nature of these features and their locations within the site.
Security features to encourage cycle parking	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were there any security features present at the site to encourage cycle parking (for example illuminated cycle parking areas, gated access, operational CCTV, etc)?  If YES, provide the month and year when any of these features were first present, and provide details of what these features consist of.
Local cycle routes	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were there cycle routes available linking the site to areas of employment, education, local amenities and/or public transport connections?  If YES, provide the month and year when any of these routes were first present. Note that this should be marked as 'yes' even if routes are not associated with the development's travel plan (see next item).
Local cycle routes: Not part of travel plan?	Tick box	If YES to the above, were these routes in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.
Additional cycling travel plan features	Text descriptions	If there are any other travel plan features associated with cycling other than those in the items above, please provide details accordingly.



**Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Car Sharing**

Data Item	Unit	Description/Definition
Car club available within walking distance	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, was there a car club available within walking distance of the site that could be used by residents of the development?  If YES, provide the month and year when this became available, and provide details, along with any specific arrangements the site developer may have with car club companies.
Additional car sharing travel plan features	Text descriptions	If there are any other travel plan features associated with car sharing, please provide details accordingly.

## Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Car Parking

Data Item	Unit	Description/Definition
Restricted on-site parking	Yes/No, plus Month & Year	At the time of the survey, was there restricted availability of on-site parking space (e.g., on-site parking is set at a lower level than forecast demand/parking standards at the time of planning consent)?  If YES, provide the month and year when this restricted availability was first introduced.
Restricted on-site parking: Not part of travel plan?	Tick box	If YES to the above, was this restriction in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.
Parking restrictions, measures and conditions	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were there any parking restrictions, measures and/or conditions at the site (for example permit eligibility restrictions, permits only available to residents not entitled to off-site CPZ parking, etc)?  If YES, provide the month and year when any of these restrictions were first implemented, and provide details of the nature of these restrictions, measures and/or conditions.
On-site parking charges	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were there any on-site parking charges for travel plan target groups (e.g., residents, visitors, etc)?  If YES, provide the month and year when these were first implemented, and provide details of what the charges were at the time of the survey.
On-site parking enforcement	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, was there any enforcement of parking measures/restrictions at the development (for example barrier control, presence of parking attendants, security patrols, clamping, ANPR, etc)?  If YES, provide the month and year when any of these measures were first implemented, and provide details of the nature of these enforcement measures.
Electric vehicle charging bays	Yes/No, plus Month & Year	At the time of the survey, were there any development-specific electric vehicle charging bays provided?  If YES, provide the month and year when these were first made available.
Number of electric vehicle charging bays	Number	If YES to the above, how many electric vehicle charging bays were provided at the time of the survey?
Electric vehicle charging bays: Not part of travel plan?	Tick box	If YES to the above, were these charging bays in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.
Additional car parking travel plan features	Text descriptions	If there are any other travel plan features associated with car parking, please provide details accordingly.

**Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Incentives**

Data Item	Unit	Description/Definition
Sustainable travel vouchers (or similar)	Yes/No, plus Month & Year	<p>At the time of the survey, were residents offered 'sustainable travel vouchers' (or similar) that can be put towards one or more options?</p> <p>If YES, provide the month and year when these were first made available.</p>
Sustainable travel vouchers: Options available	Multiple tick boxes, plus values in pounds, plus text description (if applicable)	<p>If YES to the above, please select all of the following options that applied at the time of the survey and state the voucher value of each option in pounds (for each household/dwelling).</p> <ul style="list-style-type: none"> <li>• Bus taster/season ticket</li> <li>• Train taster/season ticket</li> <li>• Purchase of a bicycle and/or cycling equipment</li> <li>• Cycle training</li> <li>• Other (please specify)</li> </ul>
Additional incentives travel plan features	Text descriptions	<p>If there are any other travel plan features associated with incentives, please provide details accordingly.</p>

## Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Public Transport

Data Item	Unit	Description/Definition
Safely accessible public bus stops	Yes/No	At the time of the survey, were there any safely accessible public bus stops within 400 metres walking distance of any of the development's access points (or within the development itself)?
Features at bus stops	Multiple tick boxes, plus Month & Year	<p>If YES to the above, please select all of the following features that were present at any of the bus stops at the time of the survey.</p> <ul style="list-style-type: none"> <li>• Real time information</li> <li>• Timetable display</li> <li>• Shelter</li> <li>• Seating</li> <li>• Dropped curbs</li> </ul> <p>If any of the features listed above are identified, provide the month and year when the earliest of these features were present.</p>
Bus stops: Not part of travel plan?	Tick box	<p>If YES to the above, were these bus stops in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.</p>
New bus services in the local area	Yes/No, plus Month & Year, plus text descriptions	<p>At the time of the survey, had any new bus services been introduced in the local area, and/or had existing services been improved?</p> <p>If YES, provide the month and year when the first new/improved service became operational, and provide details of the changes to services made.</p>
New bus services: Not part of travel plan?	Tick box	<p>If YES to the above, were these improvements in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.</p>
Pedestrian routes to local bus/tram stops	Yes/No, plus Month & Year	<p>At the time of the survey, were there accessible and well-lit pedestrian routes to local bus/tram stops within 400 metres walking distance of the site?</p> <p>If YES, provide the month and year when the first of these routes became available.</p>
Pedestrian routes to local bus/tram stops: Not part of travel plan?	Tick box	<p>If YES to the above, were these routes in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.</p>
Pedestrian routes to local rail stations	Yes/No, plus Month & Year	<p>At the time of the survey, were there accessible and well-lit pedestrian routes to local rail stations within a 1-kilometre walking distance of the site?</p> <p>If YES, provide the month and year when the first of these routes became available.</p>
Pedestrian routes to local rail stations: Not part of travel plan?	Tick box	<p>If YES to the above, were these routes in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.</p>



Residents' welcome pack (or similar)	Yes/No	At the time of the survey, were residents provided with a 'welcome pack' (or similar) that includes the promotion of local public transport services, and/or are any other specific public transport information services available to residents?
Means of information and services	Multiple tick boxes, plus Month & Year, plus text description (if applicable)	<p>If YES to the above, please select all of the following means of information and services that were provided at the time of the survey.</p> <ul style="list-style-type: none"> <li>• Residents' welcome pack</li> <li>• Noticeboard</li> <li>• Newsletters</li> <li>• Personalised journey planning/travel assistance</li> <li>• Development's travel website</li> <li>• Public transport service timetable (on paper or online)</li> <li>• Other (specify)</li> </ul> <p>If any of the means of information and services listed above are identified, provide the month and year when the earliest of these were provided.</p>
Additional public transport travel plan features	Text descriptions	If there are any other travel plan features associated with public transport, please provide details accordingly.



**Travel Plan Section (RESIDENTIAL DEVELOPMENTS): Marketing Suite & Sales Staff**

Data Item	Unit	Description/Definition
Marketing suite	Yes/No	At the time of the survey, was a marketing suite in operation at the development?
Marketing suite information on the travel plan	Yes/No, plus Month & Year, plus text descriptions	<p>If a marketing suite was present, at the time of the survey, did the marketing suite include any information on the development's travel plan (for example a display in the marketing suite, leaflets, information on the marketing website, etc)?</p> <p>If YES, provide the month and year when the first of this promotional material became available, and provide details on the various methods of information provided.</p>
Training of sales and marketing staff	Yes/No, plus Month & Year, plus text descriptions	<p>If a marketing suite was present, at the time of the survey, were sales and marketing staff provided with specific training on the site's travel plan?</p> <p>If YES, provide the month and year when the first training of this type took place, and provide details on what this training consisted of and what elements of the travel plan were covered.</p>
Additional marketing suite and sales staff travel plan features	Text descriptions	If there are any other travel plan features associated with the marketing suite and sales staff, please provide details accordingly.

## Travel Plan Section (Non-Residential Developments)

The following Travel Plan sub-sections (with headings in green) are required for SAM surveys at non-residential developments.

### Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Main Details

Data Item	Unit	Description/Definition
Date of initial travel plan implementation	Month & Year	The month and year when the first travel plan at the development went live. This means the date when any of the elements of the first travel plan became active (or when active on-site work on them started).
Date of current travel plan implementation	Month & Year	The month and year when the current travel plan at the development went live.
Travel plan accreditation	Yes/No	Has the travel plan been accredited by a recognised organisation?
Accrediting organisation	Name	If YES to the above, what is the name of the accrediting organisation?
Previous non-TRICS surveys at the development	Yes/No	Have any other non-TRICS surveys been undertaken at the development for travel plan purposes?
Travel plan type	Compulsory/ Voluntary/ Framework/ Other (specify)	State the type of travel plan in operation at the site from the available options. If Other, then state what this type is.
Local authority 'bond' condition	Yes/No	Has the local authority placed a 'bond' condition to ensure travel plan targets are met?
Travel plan co-ordinator	Yes/No	Is there a Travel Plan Co-Ordinator – a member of staff whose job it is to manage the implementation of the travel plan?
Travel plan co-ordinator work status	Full time/Part time	If YES to the above, does the Travel Plan Co-Ordinator work on the travel plan full time or part time?
Annual travel plan budget	Yes/No	Is there an annual travel plan budget allocated for this site (the budget amount is not required)?
Travel plan developer initiatives	Text descriptions	List any developer initiatives (as per planning agreements: for example, local infrastructure, improvements to local public transport services, etc).



**Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Travel Plan Objectives & Targets**

Data Item	Unit	Description/Definition
Travel plan target groups	Target group/ Not a target Group/Not present, plus text description (if applicable)	State whether following groups of people are targets of the travel plan, not targets of the travel plan, or not present at the development. <ul style="list-style-type: none"> <li>• Staff</li> <li>• Visitors</li> <li>• Customers</li> <li>• Students</li> <li>• Patients</li> <li>• All Site Users</li> <li>• Other (Specify)</li> </ul>
Pre-travel plan mode split obtained?	Yes/No	Was modal split data obtained before the introduction of the travel plan?
Date when pre-travel plan mode split data obtained	Month & Year	If YES to the above, state the month and year when the pre-travel plan mode split data was obtained. This should be the specific date when the information was obtained, and not the date, for example, of the release of Census information.
Pre-travel plan mode split data percentages	Series of percentages	Provide the breakdown of the pre-travel plan mode split data in percentages, split by the following modes: <ul style="list-style-type: none"> <li>• Vehicle Occupants (includes both drivers and passengers of all vehicle types apart from public transport).</li> <li>• Cyclists</li> <li>• Public Transport Users (includes users of all forms of public transport combined).</li> <li>• Pedestrians</li> <li>• Other</li> </ul> <p>If the percentages do not add up to 100%, this may be because the mode splits were not separately defined as per the points above, in which case further information on what the splits were should be supplied (for example, a split may be 'pedestrians and cyclists' without any split between the two being available).</p>
Source of pre-travel plan mode split data	Multiple Choice	What was the source of the pre-travel plan mode split data percentages? One of the following options should be selected. <ul style="list-style-type: none"> <li>• 2011 Census</li> <li>• 2021 Census</li> <li>• TRICS analysis</li> <li>• Previous survey at development</li> </ul>
Travel plan mode split targets identified?	Yes/No	Does the travel plan include any mode split targets?
Date when travel plan mode split targets were identified	Month & Year	If YES to the above, state the month and year when the travel plan mode split targets were identified.
Travel plan mode split target percentages	Series of percentages	Provide the breakdown of the travel plan mode split targets in percentages, split by the following modes: <ul style="list-style-type: none"> <li>• Vehicle Occupants (includes both drivers and passengers of all vehicle types apart from public transport).</li> <li>• Cyclists</li> </ul>



		<ul style="list-style-type: none"> <li>• Public Transport Users (includes users of all forms of public transport combined).</li> <li>• Pedestrians</li> <li>• Other</li> </ul> <p>If the percentages do not add up to 100%, this may be because the mode splits were not separately defined as per the points above, in which case further information on what the splits were should be supplied (for example, a split may be 'pedestrians and cyclists' without any split between the two being available).</p>
Year of the travel plan that the mode split targets represent	Number	If YES to the above, which year in the life of the travel plan do the mode split targets represent? Indicate the year in terms of the life of the travel plan (for example 'Year 5') and not the calendar year.
Main objective/target of the travel plan	Text descriptions	What is the main objective/target of the travel plan? This should be the key 'headline' objective/target.
Specific individual targets of the travel plan	Text descriptions	What are the specific individual objectives/targets of the travel plan? If there are numerous objectives/targets, then please supply a list as a series of bullet points. Such objectives/targets may relate to shifts in transport modes as well as other types.



**Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Changes in Site Environment & Circumstances**

Data Item	Unit	Description/Definition
Material changes in number of on-site staff	Yes/No plus text descriptions	Have there been any material changes in numbers of on-site staff? For example, an increase or decrease in development size and/or activity, introduction of flexible/home working, etc).
Change in local parking restrictions	Yes/No plus text descriptions	Has there been a change in local parking restrictions within walking distance of the site? These would be changes that have occurred within the last few years rather than changes that took place long ago.
Increase/decrease in the provision of sustainable transport	Yes/No plus text descriptions	Has there been an increase or decrease in the provision of sustainable transport to and from the local area where the site is located (this could include new footways/cycleways, changes to public transport frequencies and services, a new local transport hub, etc.)? These would be changes that have occurred within the last few years rather than changes that took place long ago.
Local or environmental factors that may have affected quantities and methods of travel.	Yes/No plus text descriptions	Are there any local or environmental factors that may have affected quantities and methods of travel to and from the site, especially since a previous survey at the site (if applicable). Examples might include new local infrastructure, changes to local routes, pedestrianisation of the local area, etc.)? These would be changes that have occurred within the last few years rather than changes that took place long ago.
Site-specific factors that may have affected quantities and methods of travel	Yes/No plus text descriptions	Are there any site-specific factors that may have affected quantities and methods of travel to and from the site, especially since a previous survey at the site (if applicable)? Examples might include changes to site accesses, changes and additions to site facilities, on-site parking arrangements, etc.) These would be changes that have occurred within the last few years rather than changes that took place long ago.

## Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Cycling

Data Item	Unit	Description/Definition
Cycle parking facilities	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were on-site cycle parking facilities (covered or uncovered) provided?  If YES, provide the month and year when these facilities were first available, and provide details of their nature (i.e., covered/uncovered, sheds, cycle racks, cycle compounds, etc), plus their locations within the development.
Security features to encourage cycle parking	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were there any security features present at the site to encourage cycle parking (for example illuminated cycle parking areas, gated access, operational CCTV, etc)?  If YES, provide the month and year when any of these features were first present, and provide details of what these features consist of.
On-site facilities/incentives for cyclists	Multiple tick boxes, plus text description (if applicable)	If YES to the above, please select all of the following facilities/incentives that were available at the time of the survey. <ul style="list-style-type: none"> <li>• Showers</li> <li>• Lockers for clothing/helmet storage</li> <li>• Towels/laundry/drying service provided by the development</li> <li>• Storage of folding/standard bikes within workspaces</li> <li>• Free breakfast</li> <li>• Other (specify)</li> </ul>
Events to encourage cycling	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, did the development offer events to staff to encourage cycling (for example 'Bike to Work Week' or 'Cycle Surgeries')?  If YES, provide the month and year when any of these events were first offered, and provide details of what these events consist of.
Local cycle routes	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were there cycle routes available linking the site to residential areas and/or public transport connections?  If YES, provide the month and year when any of these routes were first present. Note that this should be marked as 'yes' even if routes are not associated with the development's travel plan (see next item).
Local cycle routes: Not part of travel plan?	Tick box	If YES to the above, were these routes in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.
Additional cycling travel plan features	Text descriptions	If there are any other travel plan features associated with cycling other than those in the items above, please provide details accordingly.

**Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Car Sharing**

Data Item	Unit	Description/Definition
Features to encourage car sharing	Yes/No, plus Month & Year, plus text descriptions	<p>At the time of the survey, were there features in place to encourage car sharing at the site? For example, use of services such as Liftshare, subscription to a car club, an incentivised and monitored car share scheme, etc.</p> <p>If YES, provide the month and year when the earliest of these features became available, and provide details of what these features consist of.</p>
Guaranteed free ride home	Yes/No, plus Month & Year	<p>At the time of the survey, was there a guaranteed free ride home available to all staff if they car share and need to leave the site in an emergency?</p> <p>If YES, provide the month and year when this facility became available.</p>
Priority parking spaces for car sharers	Yes/No, plus Month & Year	<p>At the time of the survey, were there priority parking spaces for car sharers close to the development's building entrances?</p> <p>If YES, provide the month and year when these priority spaces became available.</p>
Car club available within walking distance	Yes/No, plus Month & Year, plus text descriptions	<p>At the time of the survey, was there a car club available within walking distance of the site that could be used by staff of the development?</p> <p>If YES, provide the month and year when this became available, and provide details, along with any specific arrangements the development may have with car club companies.</p>
Additional car sharing travel plan features	Text descriptions	<p>If there are any other travel plan features associated with car sharing, please provide details accordingly.</p>

**Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Car Parking**

Data Item	Unit	Description/Definition
Restricted on-site parking	Yes/No, plus Month & Year	At the time of the survey, was there restricted availability of on-site parking space (e.g., on-site parking is set at a lower level than forecast demand/parking standards at the time of planning consent)?  If YES, provide the month and year when this restricted availability was first introduced.
Restricted on-site parking: Not part of travel plan?	Tick box	If YES to the above, was this restriction in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.
Parking restrictions, measures and conditions	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were there any parking restrictions, measures and/or conditions at the site (for example permit eligibility restrictions, etc)?  If YES, provide the month and year when any of these restrictions were first implemented, and provide details of the nature of these restrictions, measures and/or conditions.
On-site parking charges	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, were there any on-site parking charges for travel plan target groups (e.g., staff, visitors, etc)?  If YES, provide the month and year when these were first implemented, and provide details of what the charges were at the time of the survey.
On-site parking enforcement	Yes/No, plus Month & Year, plus text descriptions	At the time of the survey, was there any enforcement of parking measures/restrictions at the development (for example barrier control, presence of parking attendants, security patrols, clamping, ANPR, etc)?  If YES, provide the month and year when any of these measures were first implemented, and provide details of the nature of these enforcement measures.
Electric vehicle charging bays	Yes/No, plus Month & Year	At the time of the survey, were there any development-specific electric vehicle charging bays provided?  If YES, provide the month and year when these were first made available.
Number of electric vehicle charging bays	Number	If YES to the above, how many electric vehicle charging bays were provided at the time of the survey?
Electric vehicle charging bays: Not part of travel plan?	Tick box	If YES to the above, were these charging bays in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.
Additional car parking travel plan features	Text descriptions	If there are any other travel plan features associated with car parking, please provide details accordingly.



**Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Incentives**

Data Item	Unit	Description/Definition
Season ticket loans	Yes/No, plus Month & Year, plus text descriptions	<p>At the time of the survey, did the development offer staff public transport season ticket loans?</p> <p>If YES, provide the month and year when these loans were first offered, and provide details of what type of loans were available.</p>
Financial incentives for cycling	Yes/No, plus Month & Year, plus text descriptions	<p>At the time of the survey, did the development offer staff financial incentives for cycling (for example a pre-tax salary sacrifice 'Cycle to Work' scheme or similar)?</p> <p>If YES, provide the month and year when these incentives were first offered, and provide details of what the incentives consisted of.</p>
Additional incentives travel plan features	Text descriptions	<p>If there are any other travel plan features associated with incentives, please provide details accordingly.</p>

**Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Public Transport**

Data Item	Unit	Description/Definition
Safely accessible public bus stops	Yes/No	At the time of the survey, were there any safely accessible public bus stops within 400 metres walking distance of any of the development's access points (or within the development itself)?
Features at bus stops	Multiple tick boxes, plus Month & Year	<p>If YES to the above, please select all of the following features that were present at any of the bus stops at the time of the survey.</p> <ul style="list-style-type: none"> <li>• Real time information</li> <li>• Timetable display</li> <li>• Shelter</li> <li>• Seating</li> <li>• Dropped curbs</li> </ul> <p>If any of the features listed above are identified, provide the month and year when the earliest of these features were present.</p>
Bus stops: Not part of travel plan?	Tick box	<p>If YES to the above, were these bus stops in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.</p>
New bus services in the local area	Yes/No, plus Month & Year, plus text descriptions	<p>At the time of the survey, had any new bus services been introduced in the local area, and/or had existing services been improved?</p> <p>If YES, provide the month and year when the first new/improved service became operational, and provide details of the changes to services made.</p>
New bus services: Not part of travel plan?	Tick box	<p>If YES to the above, were these improvements in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.</p>
Pedestrian routes to local bus/tram stops	Yes/No, plus Month & Year	<p>At the time of the survey, were there accessible and well-lit pedestrian routes to local bus/tram stops within 400 metres walking distance of the site?</p> <p>If YES, provide the month and year when the first of these routes became available.</p>
Pedestrian routes to local bus/tram stops: Not part of travel plan?	Tick box	<p>If YES to the above, were these routes in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.</p>
Pedestrian routes to local rail stations	Yes/No, plus Month & Year	<p>At the time of the survey, were there accessible and well-lit pedestrian routes to local rail stations within a 1-kilometre walking distance of the site?</p> <p>If YES, provide the month and year when the first of these routes became available.</p>
Pedestrian routes to local rail stations: Not part of travel plan?	Tick box	<p>If YES to the above, were these routes in place prior to the development of the site, or otherwise independent of it (i.e., not a travel plan element)? This is important to separate travel plan elements from features not directly associated with the development's travel plan.</p>



Provision of public transport information	Yes/No	At the time of the survey, was information provided to the travel plan target groups (e.g., staff, visitors, etc) on local public transport services, and/or are any other specific public transport information services available?
Means of information and services	Multiple tick boxes, plus Month & Year, plus text description (if applicable)	<p>If YES to the above, please select all of the following means of information and services that were provided at the time of the survey.</p> <ul style="list-style-type: none"> <li>• Noticeboard</li> <li>• Newsletters</li> <li>• Staff information packs</li> <li>• Personalised journey planning/travel assistance</li> <li>• Online public transport service timetables</li> <li>• Other (specify)</li> </ul> <p>If any of the means of information and services listed above are identified, provide the month and year when the earliest of these were provided.</p>
Additional public transport travel plan features	Text descriptions	If there are any other travel plan features associated with public transport, please provide details accordingly.



**Travel Plan Section (NON-RESIDENTIAL DEVELOPMENTS): Shuttle Bus**

Data Item	Unit	Description/Definition
Shuttle bus facility to residential areas/organisation facilities	Yes/No, plus Month & Year, plus text descriptions	<p>At the time of the survey, was there a shuttle bus facility provided by the development to main residential areas and/or between separate facilities of the same organisation?</p> <p>If YES, provide the month and year when this facility first became available, and provide details of what the service consists of and where it heads to/from.</p>
Shuttle bus facility to rail stations/bus stations	Yes/No, plus Month & Year, plus text descriptions	<p>At the time of the survey, was there a shuttle bus facility provided by the development to rail stations and/or bus stations?</p> <p>If YES, provide the month and year when this facility first became available, and provide details of what the service consists of and where it heads to/from.</p>
Additional shuttle bus travel plan features	Text descriptions	If there are any other travel plan features associated with shuttle buses, please provide details accordingly.