

Exeter Transport Strategy

Transport Empirical Data Report

September 2025

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1. Introduction

1.1. Purpose of Report

- 1.1.1. This report has been prepared by Devon County Council as part of the transport evidence base for the Exeter Local Plan.
- 1.1.2. This report provides an overview of the empirical travel data for the Exeter area, going back at least 10 years. This includes a review of the key characteristics and usage of the local and strategic highway network, local rail network, walking, cycling and the usage of bus services.
- 1.1.3. This evidence will inform the development of a future transport strategy and support the development of the Exeter Plan.

1.2. Structure of the Report

- 1.2.1. This structure of this report is as follows:
 - Section 2: Baseline Transport Context
 - Section 3: Demographic Data
 - Section 4: Travel to Work Census Data
 - Section 5: Walking
 - Section 6: Cycling
 - Section 7: Public Transport - Bus
 - Section 8: Public Transport - Rail
 - Section 9: Vehicular Traffic
 - Section 10: Collision Data
 - Section 11: Air Quality
 - Section 12: Planned Investment
 - Section 13: Summary

2. Baseline Transport Context

2.1.1. The local authority district of Exeter covers an area of approximately 47km² with a population estimate in mid-2024 of 138,399 (ONS). Figure 2.1 illustrates the district's boundary, as well as road and rail networks.

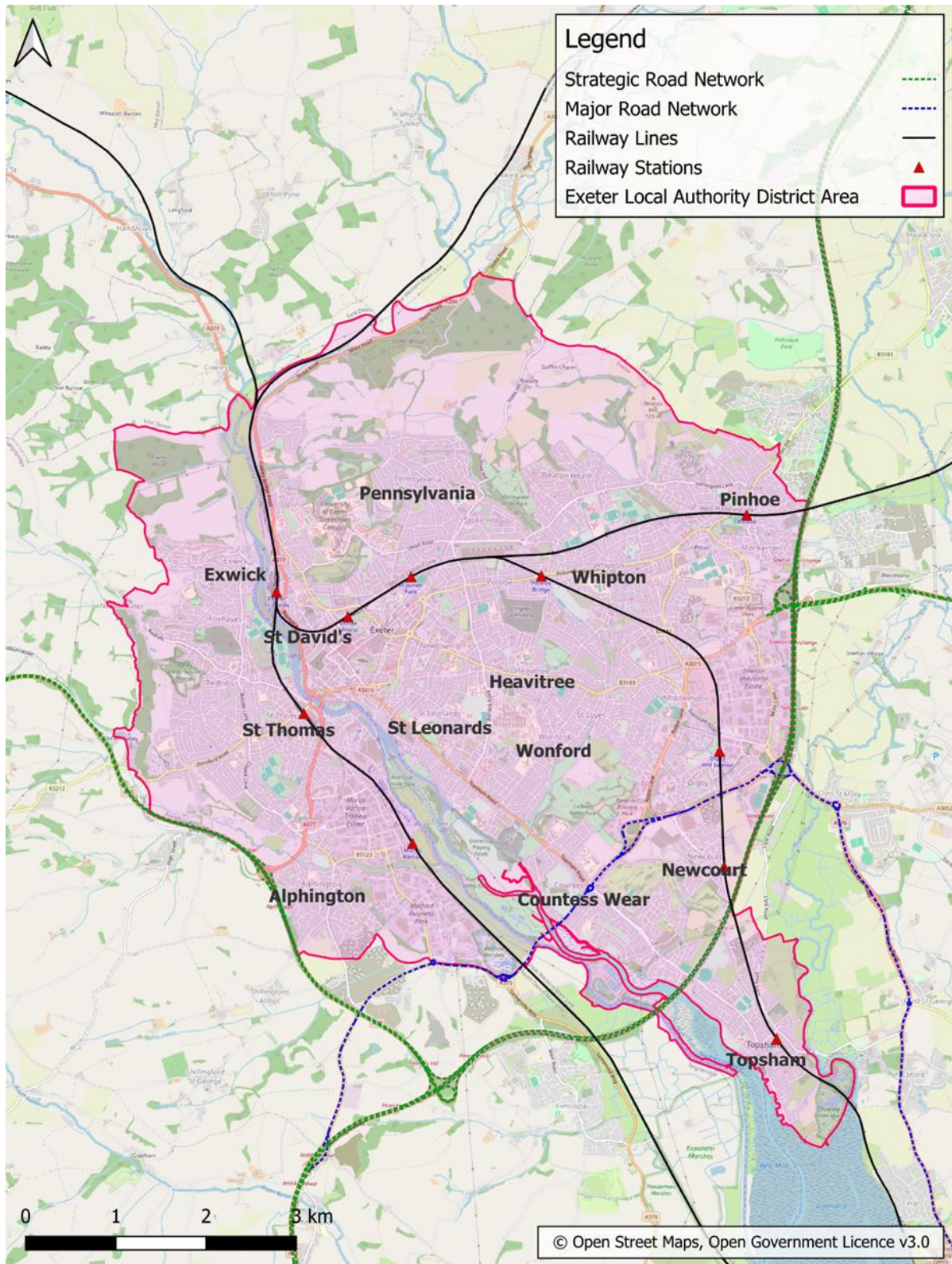


Figure 2.1 Key settlements, road, and rail networks in Exeter

- 2.1.2. The district comprises the city of Exeter and the nearby settlement of Topsham. Exeter is the main administrative, retail and employment centre for the county of Devon and a key gateway for transport infrastructure into the region.
- 2.1.3. Exeter can be divided into 15 Middle Layer Super Output Areas (MSOAs):
- Pennsylvania & University
 - Mincinglake & Beacon Heath
 - Pinhoe & Whipton North
 - St James's Park & Hooper's
 - Exwick & Foxhayes
 - Heavitree West & Polsloe
 - Heavitree East & Whipton South
 - Central Exeter
 - St Leonard's
 - St Thomas East
 - Middlemoor & Sowton
 - St Thomas West
 - Wonford & St Loye's
 - Alphington & Marsh Barton
 - Countess Wear & Topsham
- 2.1.4. Central Exeter consists of a blend of retail, office, leisure, and residential areas, and is home to Exeter Central railway station, as well as Exeter bus station. The city of Exeter has a large student population, which is predominantly situated around the Streatham Campus (in the Pennsylvania and University MSOA) and St Luke's campus (in St Leonard's).
- 2.1.5. Exeter has a working population of 88,300 and 91,000 jobs. The working population consists of those aged between 18 and 65. Key employment sectors include health and social work 19,000 jobs (19.6% of all employees), Education 12,000 (12.4%), Wholesale, Retail & Vehicle Repair 12,000 (12.4%). Public sector and professional, scientific and technical sectors are also significant employment sectors in Exeter.
- 2.1.6. Marsh Barton Trading Estate and Sowton Industrial Estate are key employment sites within Exeter, providing job opportunities within automotive, manufacturing and distribution sectors. Exeter Science Park and Exeter Skypark are just outside the City where scientific, digital and knowledge based services are more predominant.
- 2.1.7. The largest employers in the city include NHS, University of Exeter and Devon County Council who contribute 16,400 jobs. Outside of the public sector, the Met Office, EDF, South West Water and

Howmet provide a further 4,500 jobs. The total number of employees at each industrial estate with the growth area can be seen in Table 2.1

Industrial Estate	Number of employees at VAT registered businesses
Digby, Sowton, Ikea and Sandy Park	16,013
Exeter Airport	1,969
Exeter Business Park	6,359
Exeter Science Park	445
Marsh Barton & Matford	9,899
Pinhoe	584
Pynes Hill	2,857
Skypark	1,917
Winslade Park	442
Total	40,485

Table 2.1 Employees per industrial estate in Exeter and East Devon growth area

- 2.1.8. Exeter benefits from the convergence of five railway lines, including connections to the rest of the country and two direct routes to London. Local branch line train services connect the city to a number of market and coastal towns including Exmouth, Barnstaple and Crediton. Most services are within walking and cycling distance of residential areas, which is manifested by high levels of walking and cycling in the city. Exeter contains 3 of the 5 busiest railway stations in Devon by entries and exits (Exeter Central, Exeter St Davids and Digby & Sowton).
- 2.1.9. Exeter is a compact city with comprehensive coverage by bus, offering frequent services across the city and to surrounding areas. The new bus station in the city centre has improved the passenger experience and vehicles have been upgraded. Exeter is also important as a hub for long distance coach travel, with National Express, Falcon and Flixbus all serving the city and wider area.
- 2.1.10. Exeter Airport is located 7km east of the city centre and serves as a key regional transport hub. It is primarily served by the 4A bus from the city centre region.
- 2.1.11. Exeter is strategically well placed regarding its transport connectivity, as depicted in Figure 2.1. Exeter is served by the M5 motorway and the A30 and A38 trunk roads – all part of the Strategic Road Network. The A379 forms part of the Major Road network and within Exeter runs from Sowton to Matford, forming key connections towards Exmouth in the south-east and Teignbridge in the south-west. Exeter's road network consists of several radial routes connecting it to other nearby key destinations. These radial routes are listed in Table 2.2.

Radial route	Destination(s)
A377 Cowley Bridge Road	Crediton, Tiverton
B3212 Pinhoe Road	Broadclyst, Cullompton
B3183 Heavitree Road	A30 (East), Cranbrook
A3015 Topsham Road	Topsham, Exmouth
A377 Alphington Road	A30 (West)
B3212 Cowick Street	Moretonhampstead, Dartmoor National Park

Table 2.2 Exeter's radial routes and their destinations

- 2.1.12. Congestion is experienced on the major routes into the city at peak times and in some locations throughout the day. This is particularly the case on the main radial routes of Heavitree Road and Alphington Road which connect the Strategic Road Network (M5 and A30) to the city centre.
- 2.1.13. Analysis of commuter trends demonstrates that almost 80% of working Exeter residents are employed within the district. 22% work elsewhere; 38% of which work in East Devon. The resultant overall workplace population is predominantly made up of Exeter residents (50%), with 50% of its workforce coming from other areas. The residents of neighbouring districts - East Devon, Mid Devon and Teignbridge - make up 74% of these external 50%. Overall, there is an increase in the working population each day as more people enter Exeter for work than commute in. This is explored in further detail in Section 4.1 below.
- 2.1.14. The evidence within this report, including current levels of usage and trends of the existing transport infrastructure, will help inform planning for future transport schemes, and supports the proposals in Exeter's emerging Local Plan for low car development.

3. Demographic Data

3.1. Age

Geography	Population	Age		
		15 years and under	16-64 years	65 years and over
Pennsylvania & University	11,068	8.0%	77.3%	14.6%
Mincinglake & Beacon Heath	7,096	17.0%	69.6%	13.4%
Pinhoe & Whipton North	10,075	20.0%	60.8%	19.2%
St James's Park & Hoopern	9,733	5.6%	86.6%	8.0%
Exwick & Foxhayes	7,487	19.3%	65.4%	15.4%
Heavitree West & Polsloe	8,295	13.6%	74.3%	12.1%
Heavitree East & Whipton South	7,459	18.9%	60.5%	20.6%
Central Exeter	11,624	6.5%	82.9%	10.5%
St Leonard's	6,347	15.5%	65.1%	19.4%
St Thomas East	8,067	17.0%	68.5%	14.7%
Middlemoor & Sowton	12,769	19.6%	64.2%	16.2%
St Thomas West	7,212	16.9%	58.4%	24.6%
Wonford & St Loye's	8,300	18.8%	63.5%	17.7%
Alphington & Marsh Barton	6,937	14.2%	63.3%	22.5%
Countess Wear & Topsham	8,250	16.8%	56.3%	27.1%
East Devon	150,824	16%	54%	30%
Exeter	130,709	15%	69%	17%
Mid Devon	82,852	18%	58%	24%
Teignbridge	134,801	16%	57%	27%
Devon	811,640	16%	58%	26%
South West	5,701,186	17%	61%	22%

Table 3.1 2021 Census - Age statistics

- 3.1.1. Table 3.1 shows age statistics across local parish geographies as well as across other districts and at a county and regional scale. Exeter's proportion aged 15 and under (15%) is close to the countywide average (16%). Exeter has a larger proportion of the population aged between 16 and 64 years (69%) than the countywide average (58%). Additionally, just 17% of Exeter's population is aged 65 and over, compared to the countywide average of 26%.
- 3.1.2. St James's Park and Hoopern has the lowest proportion of the population aged 15 and under, with just 5.6%, followed by 6.5% for Central Exeter, and 8% for Pennsylvania and University, compared with the countywide average of 16%. These areas, with large student populations, also have the highest proportions aged 16-64 years, with 86.6% in St James's Park and Hoopern, 82.9% in Central Exeter, and 77.3% in Pennsylvania and University, compared with the countywide average of 58%.

3.2. Disability

Geography	Population	Disabled			Not disabled
		Day-to-day activities limited a lot	Day-to-day activities limited a little	Has long-term physical or mental health condition but day-to-day activities are not limited	No long-term physical or mental health conditions
Pennsylvania & University	11,065	4.2%	11.0%	8.2%	76.6%
Mincinglake & Beacon Heath	7,095	7.1%	11.6%	7.4%	73.9%
Pinhoe & Whipton North	10,072	7.7%	11.1%	7.5%	73.7%
St James's Park & Hooper	9,733	4.5%	11.6%	8.1%	75.8%
Exwick & Foxhayes	7,487	7.1%	11.2%	7.7%	74.0%
Heavitree West & Polsloe	8,295	5.7%	10.9%	8.5%	74.9%
Heavitree East & Whipton South	7,459	8.5%	12.3%	7.8%	71.3%
Central Exeter	11,624	7.4%	13.3%	7.7%	71.5%
St Leonard's	6,347	6.4%	10.7%	8.7%	74.1%
St Thomas East	8,064	7.4%	11.4%	8.1%	73.1%
Middlemoor & Sowton	12,769	5.4%	8.8%	7.6%	78.2%
St Thomas West	7,213	7.7%	12.3%	7.4%	72.5%
Wonford & St Loye's	8,296	9.0%	12.5%	7.4%	71.1%
Alphington & Marsh Barton	6,937	8.3%	11.0%	7.8%	72.9%
Countess Wear & Topsham	8,251	7.4%	12.1%	7.9%	72.6%

East Devon	150,824	7%	12%	8%	72%
Exeter	130,709	7%	11%	8%	74%
Mid Devon	82,852	7%	11%	8%	74%
Teignbridge	134,801	8%	12%	8%	72%
Devon	811,640	8%	12%	8%	72%
South West	5,701,186	7%	11%	8%	74%

Table 3.2 2021 Census disability categories

3.2.1. Table 3.2 shows statistics related to the percentages of people with disabilities at varying geographies. Generally, electoral wards in Exeter are in line with countywide and regional proportions of people with disabilities.

3.3. Ethnic Group

Geography	Population	Asian, Asian British or Asian Welsh	Black, Black British, Black Welsh, Caribbean or African	Mixed or Multiple ethnic groups	White	Other ethnic group
Pennsylvania & University	11,065	7.7%	1.0%	3.1%	86.7%	1.4%
Mincinglake & Beacon Heath	7,095	5.8%	1.2%	2.8%	88.5%	1.6%
Pinhoe & Whipton North	10,072	2.9%	0.6%	1.9%	93.4%	1.1%
St James's Park & Hooper	9,733	7.0%	1.2%	3.9%	85.8%	2.1%
Exwick & Foxhayes	7,487	2.2%	0.6%	1.7%	94.6%	0.8%
Heavitree West & Polsloe	8,295	5.8%	1.2%	3.1%	88.2%	1.7%
Heavitree East & Whipton South	7,459	3.1%	0.6%	1.9%	93.6%	0.7%
Central Exeter	11,624	11.5%	2.0%	3.6%	79.6%	3.4%
St Leonard's	6,347	4.4%	0.9%	3.4%	89.8%	1.5%
St Thomas East	8,064	2.6%	0.6%	2.6%	93.2%	1.1%
Middlemoor & Sowton	12,769	4.0%	0.6%	2.1%	92.3%	1.0%
St Thomas West	7,213	1.1%	0.3%	1.6%	96.3%	0.7%
Wonford & St Loye's	8,296	6.2%	0.8%	2.2%	89.4%	1.4%
Alphington & Marsh Barton	6,937	2.0%	0.5%	2.1%	94.3%	1.1%
Countess Wear & Topsham	8,251	2.3%	0.3%	1.4%	95.2%	0.7%
East Devon	150,824	1.0%	0.2%	1.1%	97.4%	0.3%
Exeter	130,709	4.9%	0.9%	2.5%	90.3%	1.4%
Mid Devon	82,852	0.7%	0.1%	1.1%	97.8%	0.3%
Teignbridge	134,801	0.7%	0.2%	1.2%	97.7%	0.3%
Devon	811,640	1.5%	0.3%	1.4%	96.4%	0.5%
South West	5,701,186	2.8%	1.2%	2.0%	93.1%	0.9%

Table 3.3 2021 Census ethnic groups distribution

- 3.3.1. Table 3.3 highlights the ethnicity of residents across Exeter and adjacent districts, as well as across the county and region. Exeter has more ethnic diversity than countywide averages, with MSOAs having a proportion of white residents less than the 96.4% average for Devon.
- 3.3.2. Approximately 4.9% of Exeter's population is Asian, Asian British or Asian Welsh, around 2% more than the regional average. Central Exeter in particular has a very high proportion of people from these ethnic groups (11.5%), which is more than three times the regional average (2.8%), and more than seven times the average for Devon (1.5%).
- 3.3.3. The proportions of Black, Black British, Black Welsh, Caribbean or African as well as Mixed or Multiple ethnic groups across Devon (0.3% and 1.4% respectively) are both significantly lower than the regional averages (1.2% and 2.0% respectively). The Exeter proportions of people from these ethnic groups (0.9% and 2.5% respectively) are higher than the both the county and regional averages.

3.4. Sex

Geography	Population	Female	Male
Pennsylvania & University	11,065	52%	48%
Mincinglake & Beacon Heath	7,096	51%	49%
Pinhoe & Whipton North	10,072	51%	49%
St James's Park & Hooper	9,733	51%	49%
Exwick & Foxhayes	7,487	50%	50%
Heavitree West & Polsloe	8,295	51%	49%
Heavitree East & Whipton South	7,459	52%	48%
Central Exeter	11,624	50%	50%
St Leonard's	6,347	52%	48%
St Thomas East	8,064	50%	50%
Middlemoor & Sowton	12,769	51%	49%
St Thomas West	7,213	51%	49%
Wonford & St Loye's	8,297	52%	48%
Alphington & Marsh Barton	6,937	51%	49%
Countess Wear & Topsham	8,254	53%	47%

Exeter	130,709	51%	49%
East Devon	150,828	52%	48%
Mid Devon	82,852	51%	49%
Teignbridge	134,803	52%	48%

Devon	811,640	51%	49%
South West	5,701,186	51%	49%

Table 3.4 2021 Census sex distribution

- 3.4.1. The Exeter average proportion of females (51%) and males (49%) matches that of the county and regional averages.

3.5. Gender

Geography	Population	Gender identity the same as sex registered at birth (%)	Gender identity different from sex registered at birth but no specific identity given (%)	Trans woman (%)	Trans Man (%)	All other gender identities (%)	Not answered (%)
Pennsylvania & University	10,180	91.3	0.1	0.1	0.1	0.2	8.1
Mincinglake & Beacon Heath	5,884	93.4	0.3	0.2	0.1	0.2	5.9
Pinhoe & Whipton North	8,056	94.3	0.1	0.0	0.0	0.1	5.4
St James's Park & Hooper	9,203	89.8	0.1	0.1	0.1	0.4	9.4
Exwick & Foxhayes	6,040	94.2	0.3	0.1	0.0	0.2	5.2
Heavitree West & Polsloe	7,164	92.4	0.2	0.2	0.1	0.3	6.8
Heavitree East & Whipton South	6,045	93.1	0.1	0.1	0.1	0.1	6.5
Central Exeter	10,862	89.7	0.2	0.2	0.2	0.6	9.2
St Leonard's	5,365	93.6	0.1	0.2	0.1	0.2	5.7
St Thomas East	6,703	92.8	0.2	0.1	0.0	0.2	6.7
Middlemoor & Sowton	10,275	95.2	0.1	0.1	0.1	0.1	4.4
St Thomas West	5,992	94.2	0.0	0.1	0.0	0.1	5.5
Wonford & St Loye's	6,740	94.1	0.2	0.1	0.1	0.1	5.4
Alphington & Marsh Barton	5,950	93.1	0.1	0.1	0.1	0.1	6.4
Countess Wear & Topsham	6,874	94.7	0.2	0.0	0.0	0.1	5.0

Table 3.5 Census Gender Identity distribution

3.5.1. Table 3.5 shows how people responded to a question about gender identity in the 2021 census across Exeter. Central Exeter has the lowest proportion of residents whose gender identity is the same as sex at registered birth (89.7%), followed by St James's Park and Hooper (89.7%).

Middlemoor & Sowton had the highest proportion of residents whose gender identity was the same as their sex registered at birth (95.2%), followed by Countess Wear & Topsham (94.7%)

4. Travel to Work Data

4.1. Travel to Work Census Areas

- 4.1.1. The entirety of the district of Exeter falls into the Exeter Travel to Work (TTW) Area, as shown in Figure 4.1. Its status as a regional centre for the South West means it has a very strong economic draw, with people from a much wider area travelling in to access jobs and services.

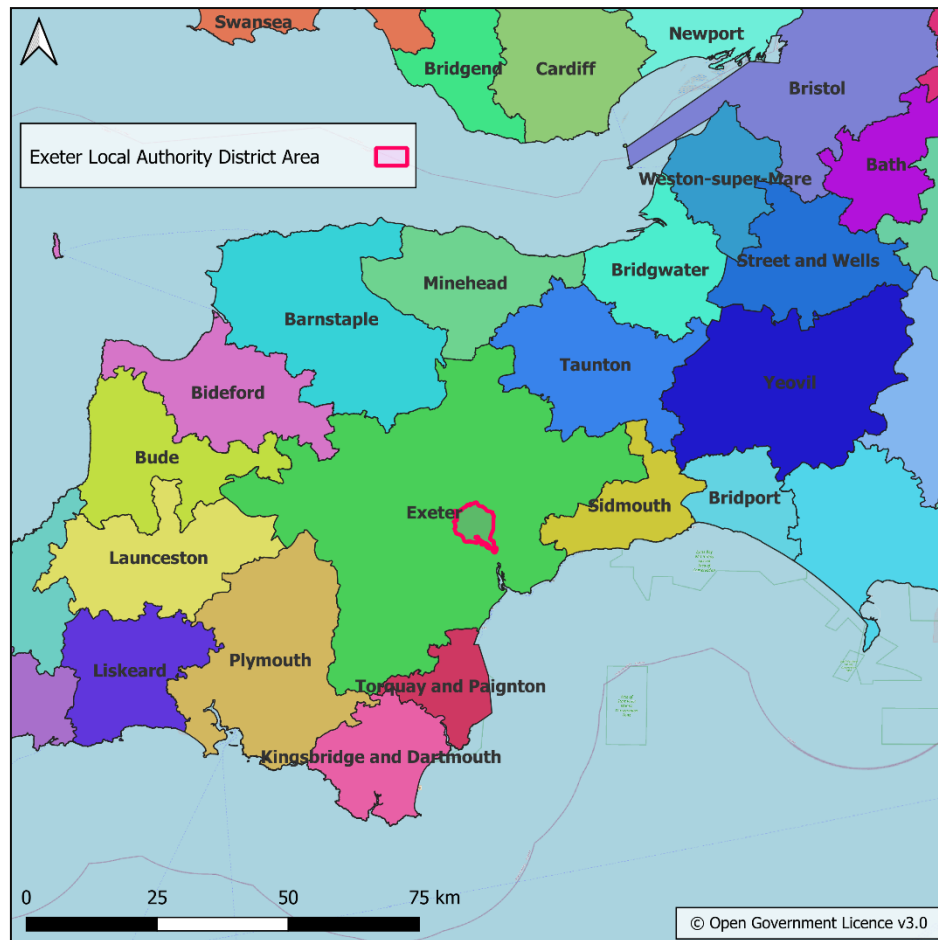
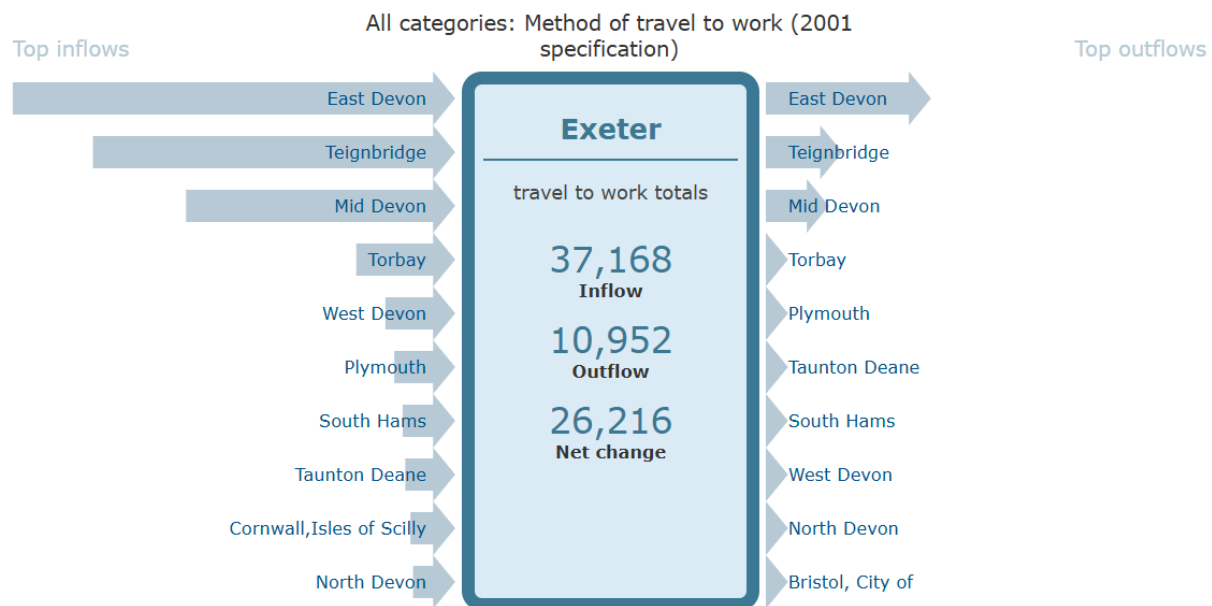


Figure 4.1 2011 Census Travel to Work Areas for the South West

- 4.1.2. According to the 2011 census¹, Exeter is now the second largest geographical TTW area in the country (behind Cambridge); the area highlighted green in Figure 4.1.
- 4.1.3. Exeter has, at 48%, the second highest percentage level of net *in* commuting (the proportion which workplace population exceeds resident working population) of any town and city in England and

¹ Although the 2021 Census has been published, it does not include updated TTW area figures. Therefore, the most recent available data remains from the 2011 Census, which identifies Exeter as the second largest geographical TTW area in the country (behind Cambridge), as illustrated by the green-highlighted area in Figure 4.1.

Wales, again behind only Cambridge (*ONS Towns and Cities analysis 2016*). This results in a highly positive net commuting flow, with 26,216 arriving into the district to work.



2

Figure 4.2 2011 Exeter Travel to Work totals

- 4.1.4. The numbers of those travelling for work in Exeter have been further disaggregated by origin, segregated into groups of those:
- Living and working in Exeter
 - Living outside Exeter and working in Exeter
 - Living in Exeter and working outside Exeter
- 4.1.5. The modal splits attributed to each of these groups are identified below in Table 4.1, from 2011 Census data. 2011 Census data is used here as 2021 Census data likely does not provide a robust indication of current patterns, due to the impact of the COVID-19 pandemic. Those who live in Exeter and work at home are not included in this table.

² Location of usual residence and place of work by method of travel to work, Census 2011. This diagram is taken from the Nomis website: <https://www.nomisweb.co.uk/census/2011/wu03uk/chart>

		Modal Splits (%)					
	ALL MODES	CAR*	BUS	TRAIN	WALK	CYCLE	Other
LIVE AND WORK IN Exeter	37,667	46.1	11.5	1.3	30.9	8.4	1.8
COMMUTE IN to Exeter	37,168	83.7	5.6	5.3	1.8	1.8	1.8
COMMUTE OUT of Exeter	10,952	77.6	6.4	4.6	6.3	2.6	2.4
LIVE AND WORK IN Devon	221,514	69.2	5.0	1.4	18.7	3.7	2.0
COMMUTE IN to Devon	44,220	83.7	4.7	2.2	5.1	1.4	2.9
COMMUTE OUT of Devon	38,198	82.8	3.3	4.3	4.6	1.4	3.6
* Both drivers and passengers are counted under "CAR"							

Table 4.1 2011 Mode of travel for those travelling to work

- 4.1.6. There are approximately 37,700 people who live and work in Exeter. The majority of those commuting out of Exeter are to locations in East Devon. In terms of modal splits, the majority of those who are commuting in or out of Exeter do so by car (approximately 84% and 78% respectively). Approximately the same number of people use public transport to commute into Exeter (11%) as to commute out (11%); both of these figures are lower than the number of those using public transport within Exeter (13%). Bus usage in itself is far greater amongst those living and commuting within Exeter (12%); approximately double those commuting in (6%) and out (6%) of Exeter.
- 4.1.7. Active travel (in this case, walking and cycling) is greater amongst out-commuters (9%) than in-commuters (4%); however these are both far less than the proportion of those who use active travel to commute within Exeter (39%). By extension, the proportion of those who use a car to commute within Exeter is also far lower at 46%.
- 4.1.8. The proportions of people travelling actively across Exeter are very different to those living and working in, commuting to and commuting from Devon into other counties. Car travel is significantly lower for those living and working in Exeter compared to Devon, yet equivalent to those who commute into Exeter compared to into Devon itself. A key difference is also found between living and working in Exeter compared to in Devon where a notably greater proportion of Exeter residents walk as a means of commuting; 30.9% versus 18.7%, respectively.

4.2. Travel to Work draw across Exeter

- 4.2.1. The following section aims to identify and analyse commuting trends across Exeter, both within Exeter and out of the district.
- 4.2.2. In order to perform analysis at a local scale, useful geographies must be defined and used. The census provides demographic data for geographies such as Middle-Layer Super Output Areas (MSOAs), areas with approximately 7,000 residents. Although these MSOAs may not correspond with

electoral wards, these are a useful metric to use. The 2011 MSOA boundaries within the Exeter district boundary – equivalent to 2021 MSOA boundaries – are found in Figure 4.3.

4.2.3. It is worth noting that a large proportion of this section is based on 2011 census data.

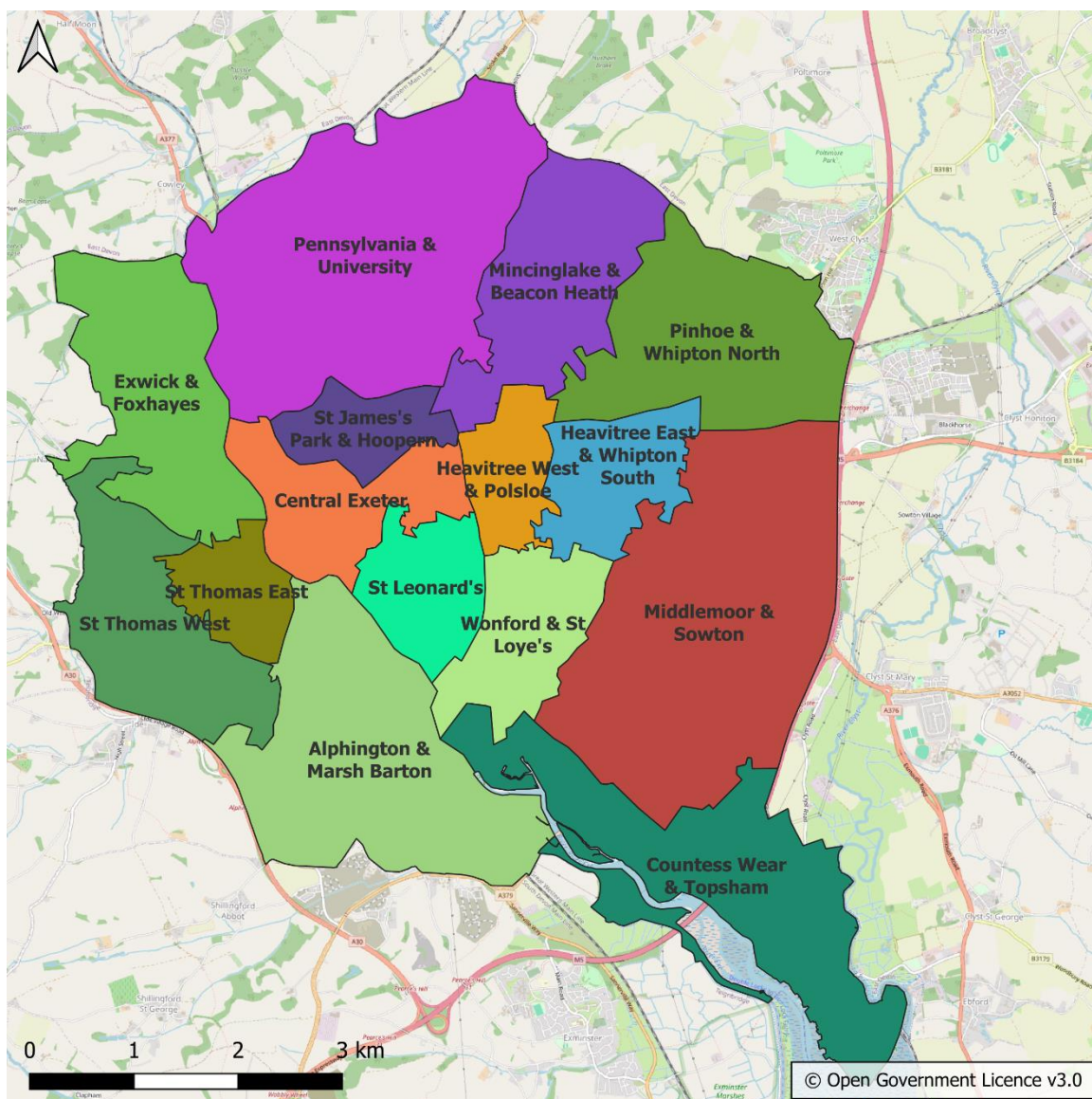


Figure 4.3 Exeter 2011 and 2021 MSOA zones used in analysis

Exeter Travel to Work draw

- 4.2.4. Self-containment refers to the proportion of residents who both live and work within the same town. Intuitively, it might be expected that larger towns with more jobs, services and amenities have the highest levels of self-containment.
- 4.2.5. The numbers of Exeter-bound trips for all modes by MSOA zone in Exeter (representing levels of self-containment) are shown in Figure 4.4. There is no clear spatial trend in the data, with MSOAs generally having between 2,000 and 3,000 trips within the Exeter district boundary. However, there is a high level of self-containment within Middlemoor and Sowton (3,380), contrastingly adjacent to the lowest 1,780 trips from the Countess Wear and Topsham area. This suggests the draw of East Devon through the proximity of south-east Exeter residents to Exmouth and adjacent settlements, or the uptake of home-working in this less central part of Exeter.

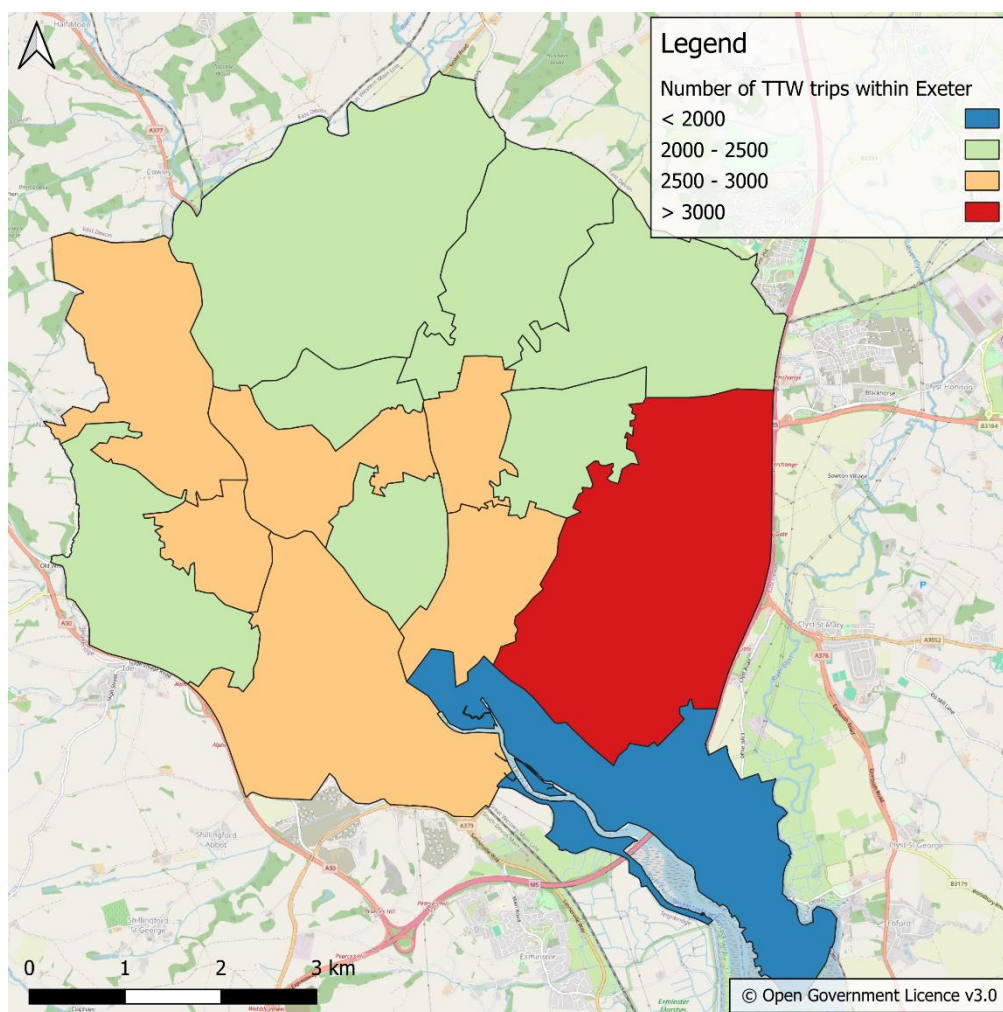


Figure 4.4 TTW trips to Exeter (2011), by MSOA area in Exeter

East Devon Travel to Work draw

- 4.2.6. Figure 4.2 identifies East Devon as the largest travel to work outflow within the Exeter district boundary. Figure 4.5 shows the magnitude of its draw per MSOA. Akin to Figure 4.4, there is no obvious spatial trend to the data; yet Middlemoor and Sowton identifies the strongest out-commuting trend to East Devon (453 trips). This may be obvious provided its proximity to both East Devon itself and the A30 and A376, key routes on the Strategic Road Network and Major Road Network respectively that link to East Devon. Comparing the numbers of trips between Figure 4.4 and Figure 4.5 highlights what is found in Figure 4.2 and Table 4.1 regarding Exeter's highly positive net commuting flow and self-containment levels.

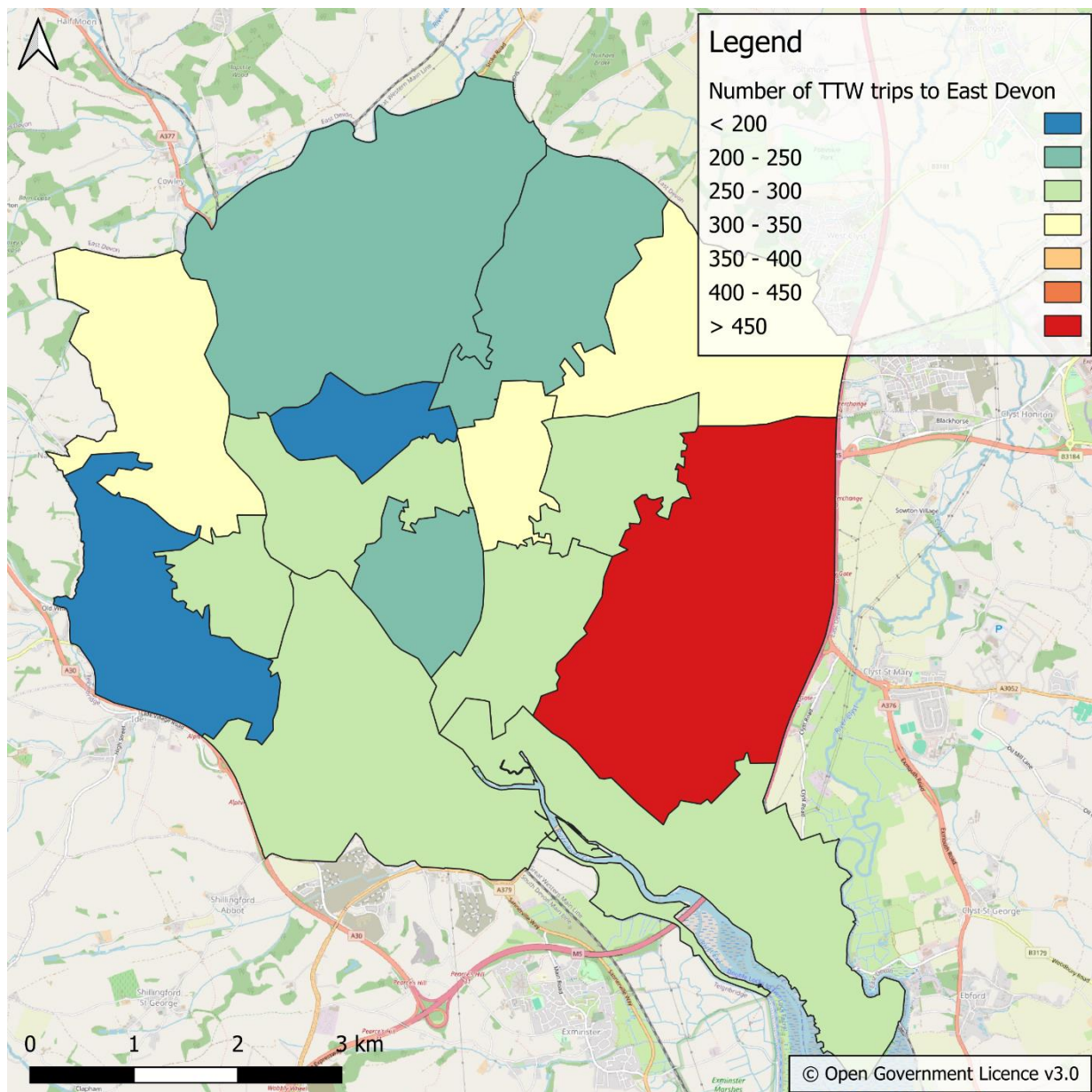


Figure 4.5 TTW trips to East Devon (2011) by MSOA area in Exeter

Per MSOA Zone Travel to Work draw

- 4.2.7. To gauge an understanding of the relative number and proportions from across Exeter, the Census TTW data is shown below in Table 4.2. These numbers are taken from the 2011 Census *Location of usual residence and place of work by method of travel to work (MSOA)* table. These same combined MSOA areas were used as in the maps shown above.
- 4.2.8. Of the MSOAs in Figure 4.2, Central Exeter has the largest proportion of its population working within the area, with 27%. Working population includes all people who work within Exeter, whether they are residents or not. In Exwick and Foxhayes only 2% of workers live and work in the same MSOA. Exeter Central also has the lowest proportion working elsewhere in Exeter (40%) compared to other MSOAs, with the next lowest being Middlemoor and Sowton (43%). Both of these MSOAs are more than 20% lower than the overall proportion of Exeter residents who work in an MSOA other than the one they reside in (66%).
- 4.2.9. Across Exeter, 8% of workers class themselves as working from home. There is some variation within this category, from 6% in Wonford and St Loye's, up to 14% working from home in Countess Wear and Topsham. It is important to note that these statistics are based on the 2011 Census. The 2021

Census took place shortly after the COVID-19 lockdowns, during a period of significant disruption to commuting patterns, and therefore does not provide a reliable reflection of how people were travelling to work. Given the widespread adoption of remote working since the pandemic, it is likely that the proportion of people working from home has increased considerably by 2025.

- 4.2.10. Across Exeter, between 2% (Exwick and Fohayes) and 27% (Central Exeter) of respective MSOA-defined settlements work and live within the same MSOA. This self-containment averages to approximately half (49%) of the district's population when considering working and living within Exeter as a whole.

Settlement	Population		Working within MSOA %	Working elsewhere in Exeter %	Work from home %
	Total	Working Population			
Exeter	117,773	57,139	-	66%	8%
Pennsylvania & University	9,019	3,415	9%	54%	11%
Mincinglake & Beacon Heath	6,825	3,305	2%	65%	7%
Pinhoe & Whipton North	7,957	3,700	6%	58%	8%
St James's Park & Hoopern	8,421	3,332	5%	62%	9%
Exwick & Foxhayes	7,546	4,111	2%	65%	7%
Heavitree West & Polsloe	8,173	4,146	3%	65%	7%
Heavitree East & Whipton South	7,557	3,549	4%	64%	7%
Central Exeter	9,584	4,428	27%	40%	9%
St Leonard's	6,587	3,433	7%	56%	11%
St Thomas East	7,824	4,330	7%	60%	7%
Middlemoor & Sowton	9,307	5,227	22%	43%	8%
St Thomas West	7,175	3,496	3%	64%	8%
Wonford & St Loye's	7,976	3,674	15%	56%	6%
Alphington & Marsh Barton	7,231	3,951	15%	49%	8%
Countess Wear & Topsham	6,591	3,042	9%	49%	14%

Table 4.2 Percentage of population working within the MSOA where they reside, elsewhere or from home (2011 Census)

4.3. Travel to Work by Distance

- 4.3.1. The 2011 and 2021 census data in Table 4.3 shows the length of TTW trips within Exeter and in other districts within the Exeter TTW area.
- 4.3.2. It is important to highlight that the 2021 data was collected during a period of unprecedented change during the pandemic, and as such the results were affected by an increase in home-working.

Area	Year	Distance travelled to work								Commuting Total	WFH	Other*
		< 2km	2 - 5km	5 - 10km	10 - 20km	20 - 30km	30 - 40km	40 - 60km	> 60km			
Exeter	2011	36%	38%	10%	5%	4%	1%	2%	3%	48,316	4,825	3,998
	2021	35%	37%	10%	7%	4%	1%	2%	3%	33,642	18,285	7,773
East Devon	2011	24%	13%	16%	28%	8%	3%	2%	5%	44,338	10,081	5,489
	2021	21%	14%	19%	27%	9%	4%	2%	4%	36,162	19,757	10,808
Mid Devon	2011	24%	9%	15%	27%	15%	3%	3%	4%	28,209	6,773	3,526
	2021	23%	9%	16%	26%	15%	4%	4%	3%	21,922	11,963	6,397
Teignbridge	2011	21%	16%	21%	24%	9%	2%	2%	4%	45,186	8,611	5,165
	2021	19%	17%	22%	25%	9%	3%	3%	3%	34,461	17,497	10,178

* Other includes no fixed place of work, working on an offshore installation and working outside of the UK.

Table 4.3 Comparison of distances travelled to work across districts (2011,2021)

- 4.3.3. Across the districts, there is generally either an equal number of trips made or a reduction in the number of trips made across all commuting distances from 2011 to 2021, with few exceptions (in Exeter, there is an increase in the 10-20km distance). This is consistent with an overall decrease in the total number of commuting trips across all chosen districts. Among the districts, Exeter has the greatest reduction in the total number of trips at 30%, East Devon has the lowest at 18%. This in itself is consistent with the trends in trips taken across the country as revealed in the recent National Travel Survey 2023³.
- 4.3.4. The reduction in these commuting trips is in conjunction with an increase in those working from home. Exeter experienced a 279% increase in people working from home, compared with a 96% increase in East Devon and 77% increase in Mid Devon. Exeter also saw a significant decrease in all commuting trips, including at lower distances. These figures are comparable with the National Travel Survey 2023, suggesting a shift towards working from home and hybrid working as the COVID-19 pandemic changed working patterns⁴.

4.4. Travel to Work by Mode

- 4.4.1. The changing mode splits for commuters from 2011 to 2021 for all areas in Exeter are shown below in Table 4.4. In addition, these proportions have been applied to the census populations of all those in employment between 16 and 74.

³ <https://www.gov.uk/government/statistics/national-travel-survey-2023/nts-2023-introduction-and-main-findings>

⁴ <https://www.gov.uk/government/statistics/national-travel-survey-2023/nts-2023-trips-by-purpose-age-mode-and-sex>

	Mode	Work from Home	Train	Bus	Car	Cycle	On foot	Other
Exeter	2011	8%	2%	9%	50%	6%	22%	2%
	2021	31%	1%	5%	41%	5%	16%	2%
Pennsylvania & University	2011	11%	2%	8%	51%	5%	21%	2%
	2021	42%	1%	3%	36%	4%	12%	2%
Mincinglake & Beacon Heath	2011	7%	1%	13%	56%	6%	15%	2%
	2021	24%	1%	7%	47%	5%	14%	3%
Pinhoe & Whipton North	2011	8%	2%	10%	62%	5%	10%	2%
	2021	30%	1%	4%	51%	4%	8%	2%
St James's Park & Hoopern	2011	9%	3%	7%	30%	6%	43%	2%
	2021	40%	1%	4%	24%	5%	24%	2%
Exwick & Foxhayes	2011	7%	2%	10%	60%	5%	13%	2%
	2021	24%	1%	6%	50%	4%	13%	3%
Heavitree West & Polsloe	2011	7%	2%	7%	41%	8%	33%	2%
	2021	35%	1%	3%	30%	6%	24%	2%
Heavitree East & Whipton South	2011	7%	1%	11%	55%	6%	18%	2%
	2021	25%	0%	6%	47%	5%	15%	2%
Central Exeter	2011	9%	3%	9%	31%	6%	39%	2%
	2021	34%	2%	7%	23%	5%	27%	3%
St Leonard's	2011	11%	2%	6%	39%	8%	33%	1%
	2021	41%	1%	2%	25%	5%	25%	1%
St Thomas East	2011	7%	2%	10%	47%	7%	25%	2%
	2021	30%	1%	5%	39%	5%	19%	2%
Middlemoor & Sowton	2011	8%	3%	8%	62%	5%	13%	2%
	2021	32%	1%	4%	47%	4%	9%	2%
St Thomas West	2011	8%	1%	9%	59%	5%	16%	3%
	2021	24%	1%	3%	52%	4%	13%	3%
Wonford & St Loye's	2011	6%	1%	12%	48%	6%	24%	2%
	2021	21%	0%	7%	41%	5%	23%	3%
Alphington & Marsh Barton	2011	8%	1%	8%	56%	7%	19%	2%
	2021	27%	1%	4%	45%	5%	15%	2%
Countess Wear & Topsham	2011	14%	5%	9%	54%	7%	10%	2%
	2021	31%	1%	4%	48%	6%	8%	2%

Table 4.4 Modal split for commuters 2011 to 2021 in Exeter

	Year	Work from home	Train	Bus	Car	Cycle	On foot	Other	Total
Exeter Trips	2011	4,825	1,089	5,179	28,737	3,542	12,621	1,146	52,314
	2021	18,285	528	2,838	24,366	2,821	9,603	1,258	41,414
% change 2011 to 2021		279%	-52%	-45%	-15%	-20%	-24%	10%	-21%
Regional Trips	2011	323,789	36,382	117,582	1,632,348	87,912	311,904	50,467	2,236,595
	2021	818,531	13,321	75,929	1,420,535	63,427	248,004	52,587	1,873,803
% change 2011 to 2021		153%	-63%	-35%	-13%	-28%	-20%	4%	-16%
National Trips	2011	2,724,010	1,323,738	1,905,645	15,773,066	741,383	2,596,907	1,461,587	23,802,326
	2021	8,671,722	529,461	1,160,990	13,608,018	569,295	2,113,657	1,120,523	19,101,944
% change 2011 to 2021		218%	-60%	-39%	-14%	-23%	-19%	-23%	-20%

Table 4.5: Gross numbers by mode for travel to work trips in Exeter

- 4.4.2. In terms of gross numbers, between 2011 and 2021 the number of travel to work trips in Exeter has experienced a significant decrease of 21%, as shown in
- 4.4.3. Table 4.5. There has also been a significant increase in the number of people working from home, which rose by 279% between 2011 and 2021. Aside from the 'other' category (e.g. taxis and motorcycles), which increased by 10%, all modes have generally decreased, both in terms of proportions and gross numbers. Train journeys have decreased by the largest proportion (52%), whilst car journeys decreased by the smallest proportion (15%).
- 4.4.4. Notably, a significant majority of trips are made by car/van. This figure includes both drivers and passengers (although the number of drivers was considerably greater) and those who use vans.
- 4.4.5. Over this period, travel to work trips on foot remained the second most popular mode of travel in every area. On foot trips decreased in line with the redistribution of other modes of TTW trips. However, train trips and bus trips have decreased by a significantly greater proportion (62% and 45% change, respectively) than others. This is likely due to the social distancing rules that were in place during the Census.
- 4.4.6. This data does not confirm at what time in the day these trips are taking place. Additionally, it is not known how travel to work patterns have changed since the 2021 census. The National Travel Survey 2024⁵ suggests that the overall distance travelled for commuting has increased since Covid19. The average distance travelled per person for commuting was 817 miles in 2020, compared to 1,007 miles in 2024. This is a 23% increase, although is still 21% below the pre-Covid distance of 1,276.

⁵ NTS 2024 NTS0403c: Average distance travelled by trip purpose including short walks (miles per person per year): England, 2002 onwards

4.5. Travel to Work by Mode – Local and National Comparison

- 4.5.1. To explore how the transport travel to work patterns for Exeter compare to the rest of Devon and the region, a comparison with the 2021 Census TTW data from other districts and the South West has been undertaken. These comparisons are shown in Table 4.6.

	Working Pop.	Car	Work from home	Train	Bus/ minibus/ coach	Car pass.	On foot	Cycle
Exeter	59,699	37%	31%	1%	5%	4%	16%	5%
East Devon	66,728	52%	30%	1%	2%	3%	9%	2%
Mid Devon	40,282	53%	30%	0%	1%	4%	9%	1%
North Devon	45,163	52%	24%	0%	2%	4%	13%	2%
South Hams	40,587	50%	33%	0%	1%	3%	9%	1%
Teignbridge	62,138	54%	28%	1%	2%	4%	8%	1%
Torridge	30,051	57%	26%	0%	2%	4%	9%	1%
West Devon	25,384	52%	31%	0%	1%	3%	9%	1%

Devon	370,032	50%	29%	1%	2%	4%	10%	2%
South West	2,692,334	49%	30%	0%	3%	4%	9%	2%

Table 4.6: Comparison of 2021 census TTW mode splits against other districts, Devon and the South West

- 4.5.2. Table 4.6 shows that Exeter has a lower percentage of car commuting (37%) than all other districts in Devon. Exeter also has a lower percentage of car commuting than the countywide average (50%), as well as the average for the South West (49%). This split is typical of an urban area with an extensive public transport network and many facilities within walking and cycling distances.
- 4.5.3. 31% of the working population work from home, which is slightly high compared to other districts in Devon (which are between 24% and 31%), however is consistent with the South West average (30%).
- 4.5.4. 1% of commuters from Exeter use the train to travel to work, which is in line with the countywide average (1%). 5% of commuters in Exeter use either bus, minibus or coach to travel to work, which is more than double the average for Devon (2%).

- 4.5.5. Active modes (walking and cycling) were used by 21% of commuters in Exeter during the 2021 census. This is almost double the Devon (12%) and South West (11%) averages. After Exeter, the second highest proportion of active mode commutes was in North Devon (15%).
- 4.5.6. The travel to work mode splits for some of the largest towns within the Greater Exeter area (i.e. East Devon, Exeter, Mid Devon and Teignbridge) is shown below in Table 4.7.

Town	District	Car	Work from Home	Train	Bus, minibus coach	Car pass.	Cycle	Walk	Other
Exeter	Exeter	37%	31%	1%	5%	4%	5%	16%	2%
Kingsteignton	Teignbridge	63%	21%	1%	1%	4%	1%	7%	2%
Cullompton	Mid Devon	58%	22%	0%	2%	5%	1%	9%	2%
Axminster	East Devon	58%	24%	1%	1%	4%	1%	10%	2%
Cranbrook	East Devon	58%	28%	1%	4%	2%	2%	3%	2%
Honiton	East Devon	56%	21%	1%	1%	4%	1%	13%	2%
Seaton	East Devon	55%	20%	1%	2%	4%	2%	15%	2%
Tiverton	Mid Devon	54%	21%	0%	2%	5%	2%	15%	2%
Newton Abbot	Teignbridge	53%	21%	2%	2%	4%	2%	14%	2%
Teignmouth	Teignbridge	52%	26%	2%	2%	4%	1%	11%	2%
Dawlish	Teignbridge	52%	25%	2%	3%	4%	1%	11%	2%
Exmouth	East Devon	52%	24%	1%	3%	4%	3%	12%	2%
Crediton	Mid Devon	50%	23%	0%	3%	4%	1%	17%	2%
Sidmouth	East Devon	50%	26%	0%	2%	4%	2%	15%	2%

Table 4.7: Comparative 2021 TTW mode splits of different towns in the Greater Exeter area.

- 4.5.7. Across all the towns travelling by car is by far the dominant mode choice, broadly accounting for over half of all trips. Walking is the next most popular, representing around 15%, albeit the levels from town to town are much more variable.
- 4.5.8. The highest active mode split after Exeter (21%) is in Crediton, where 18% of commuter trips are made by walking or cycling, 17% of which are walking. Cranbrook has the lowest active mode split, with just 5% walking or cycling to work, followed by Kingsteignton at 8%.
- 4.5.9. Kingsteignton has the highest proportion of car commuters among the settlements listed, at 63%. In contrast, Exeter has the lowest, with just 37% commuting by car. Cranbrook also stands out, not only for its relatively high car usage (58%) but also for having the highest proportion of residents working from home (28%) and the highest bus usage (4%). All other settlements, apart from Exeter, show a car modal split exceeding 50%.
- 4.5.10. Table 4.7 shows that In Exeter, the proportion of commuters who use the train was just 1% in 2021. This is mostly in line with other settlements, which all had a mode split of between 0% and 2% for trains.

5. Walking

5.1. TTW Numbers

- 5.1.1. As identified in the Travel to Work data in Section 4, walking is the third most popular mode of travel to work in Exeter. Core walking zones for Exeter are highlighted in the Exeter Local Cycling and Walking Infrastructure Plan, with the City Centre selected as the initial priority of focus due to having the highest levels of footfall. There is an ambition to continue to improve walking infrastructure due to many residents' and visitors' reliance on walking, as well as the various health and economic benefits. The proportion and number of workers in Exeter who walk to work can be viewed in Table 5.1 below, which shows that over 9,600 people in Exeter walk to work.

MSOA Location (residence)	Walk TTW Mode Split		Walk TTW numbers
	2011	2021	2021
Exeter	22%	16%	9,603
Pennsylvania & University	21%	12%	387
Mincinglake & Beacon Heath	15%	14%	433
Pinhoe & Whipton North	10%	8%	394
St James's Park & Hoopern	43%	24%	748
Exwick & Foxhayes	13%	13%	507
Heavitree West & Polsloe	33%	24%	975
Heavitree East & Whipton South	18%	15%	514
Central Exeter	39%	27%	1,241
St Leonard's	33%	25%	803
St Thomas East	25%	19%	838
Middlemoor & Sowton	13%	9%	613
St Thomas West	16%	13%	429
Wonford & St Loye's	24%	23%	890
Alphington & Marsh Barton	19%	15%	545
Countess Wear & Topsham	10%	8%	287

Table 5.1: Walk Travel to Work Census Data

- 5.1.2. The walking TTW mode split is shown in Figure 5.1. Across Exeter, the proportion of workers who walk to work decreased, from 22% in 2011 to 16% in 2021. This decrease is potentially due to the large increase in working from home (which rose from 8% to 31% in the same period) as a result of Covid-19.
- 5.1.3. While the majority of Exeter has high rates of commuting by foot, some areas including Pinhoe and Whipton North, Middlemoor and Sowton, and Countess Wear and Topsham, have relatively low rates (all 9% and under as of 2021). These areas are further away from the city centre, and therefore outside of walking distance to the key employment area. Similarly, the areas with higher rates of commuting by foot - Central Exeter, St. James' Park and Hoopern, and St Leonard's (all 24% and above) – are all relatively close to the city centre.

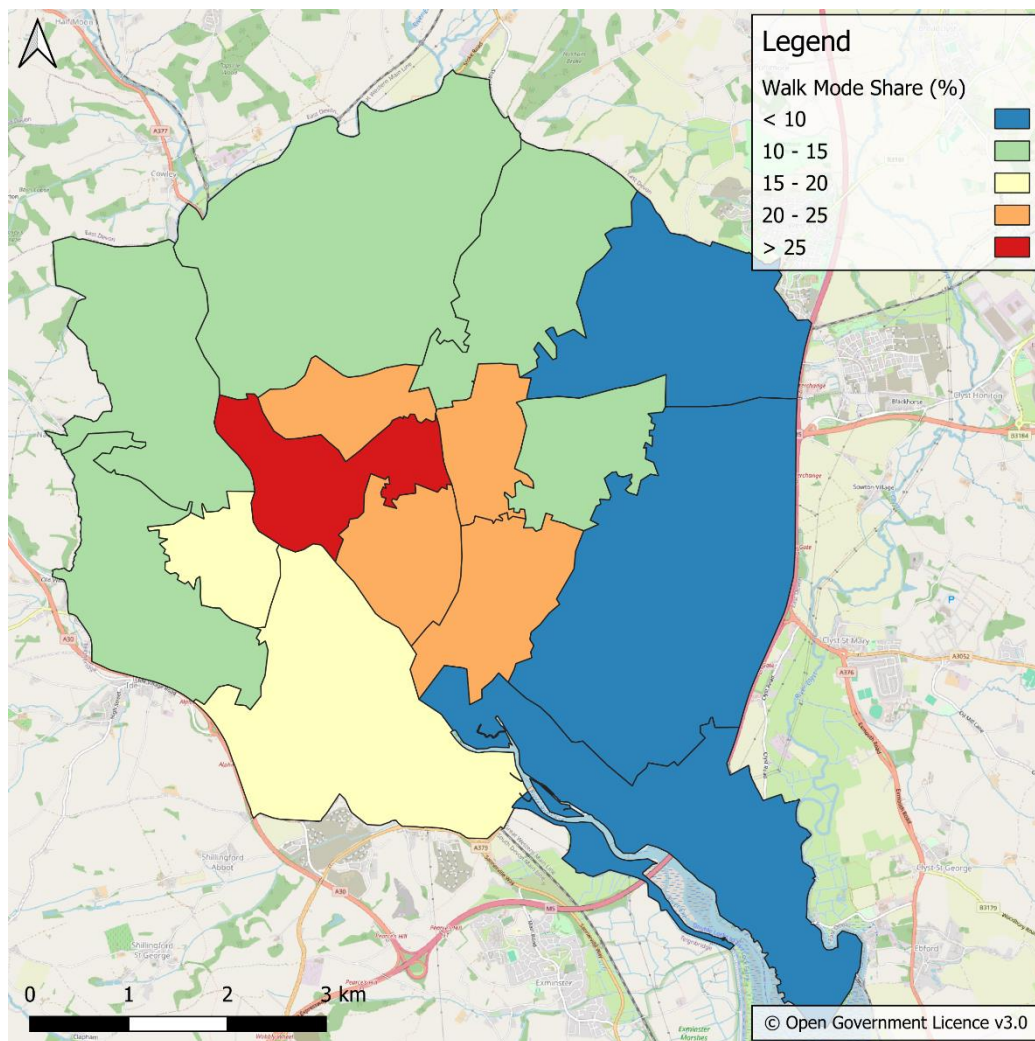


Figure 5.1: Walking TTW mode split across Exeter

5.2. Walking as part of a Multi-Stage Trip

- 5.2.1. In addition to forming a single mode choice, walking also forms part of public transport journeys, which is unlikely to be captured in the above data. The 2014 National Travel Survey⁶ (NTS) note on Multi-Stage trips sets out that 27% of all walking trips are part of a trip by another mode.
- 5.2.2. The NTS also sets out that walking stages as part of a multi modal trips, as shown in, Figure 5.2 tend to be shorter. This seems sensible that if it forms part of a trip, it is likely to be shorter than for an individual trip.
- 5.2.3. It is therefore important to ensure that the layout of future developments ensure that the shortest routes to key attractions and public transport nodes are provided.

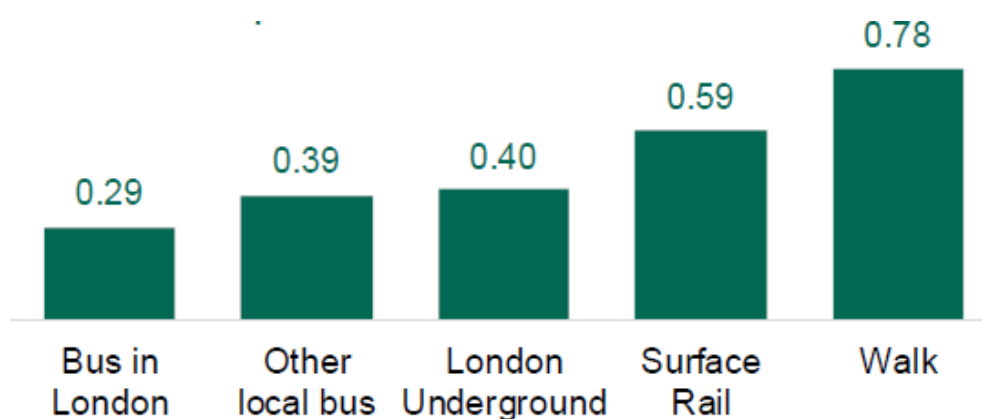


Figure 5.2: Average length in miles of a walking stage by main mode

- 5.2.4. It is noted that the average walk of 0.78 miles, is shorter in length than the average commute distance. This would seem to be reflective that people are likely to live closer to other amenities (such as shops or schools) than their place of work.

⁶ <https://www.gov.uk/government/statistics/national-travel-survey-2014>

6. Cycling

6.1. Introduction

- 6.1.1. Cycling provides a sustainable means of travel, an alternative to private car, albeit primarily for shorter-distance trips. Cycle infrastructure in Exeter forms a key part of Devon's cycle network, with many routes providing both leisure and key transport functions. There are 22 strategic cycle routes highlighted in the Exeter LCWIP, each providing important local and regional links.
- 6.1.2. The local cycle network in Exeter has been enhanced in recent years, including:
- **E4, Cumberland Way to Summer Lane bridge**
 - **E3 improvements Hill Barton Road crossing, Homefield Road and Chard Road modal filters**
 - **E9 Ludwell Lane modal filter, Dryden Road, Wonford Road and Magdalen Road.**
 - **Rifford Road cycle route.** A bidirectional cycle route along Rifford Road forms a crucial part of the north/south strategic cycle route E12
 - **Queen Street Highway Improvements.** Widening of pavement, reducing traffic flow significantly by allowing only one direction of travel for vehicles except for buses and taxis which are able to travel in both directions.
 - **School Streets at Ladysmith School and Whipton Barton School.**
 - Pinhoe Area Access Strategy improvements (Crossings at Moonhill Copse, Parkers Cross Lane).
 - **Pedestrian and cycle bridge over the A379.** This bridge connects different sections of the new community in southwest Exeter
 - **Green lanes – Doctor's Walk, Langaton Lane, Ludwell Lane, Rydon Lane (Woodbury)**



Figure 6.1 Photo depicting Magdalen Road's contraflow cycle lane

- 6.1.3. The Devon Countywide Local Cycling and Walking Infrastructure Plan (LCWIP) has been developed to identify the long-term aspirations, and short-term priorities, for cycling and walking routes across Devon. The speed of delivery of these routes relies heavily on the availability of external funding opportunities. At a smaller geography, the Exeter LCWIP was adopted by Devon County Council's Cabinet in January 2024.
- 6.1.4. Exeter's cycle infrastructure is improving, with recent delivery of high-quality facilities such as the place making improvements on Magdalen Road with contraflow cycle lane, sections of segregated cycle routes, new cycle bridges, and roads where traffic levels have been reduced to support safer cycling. Despite these advancements, further improvements face challenges including limited highway space and constrained funding.

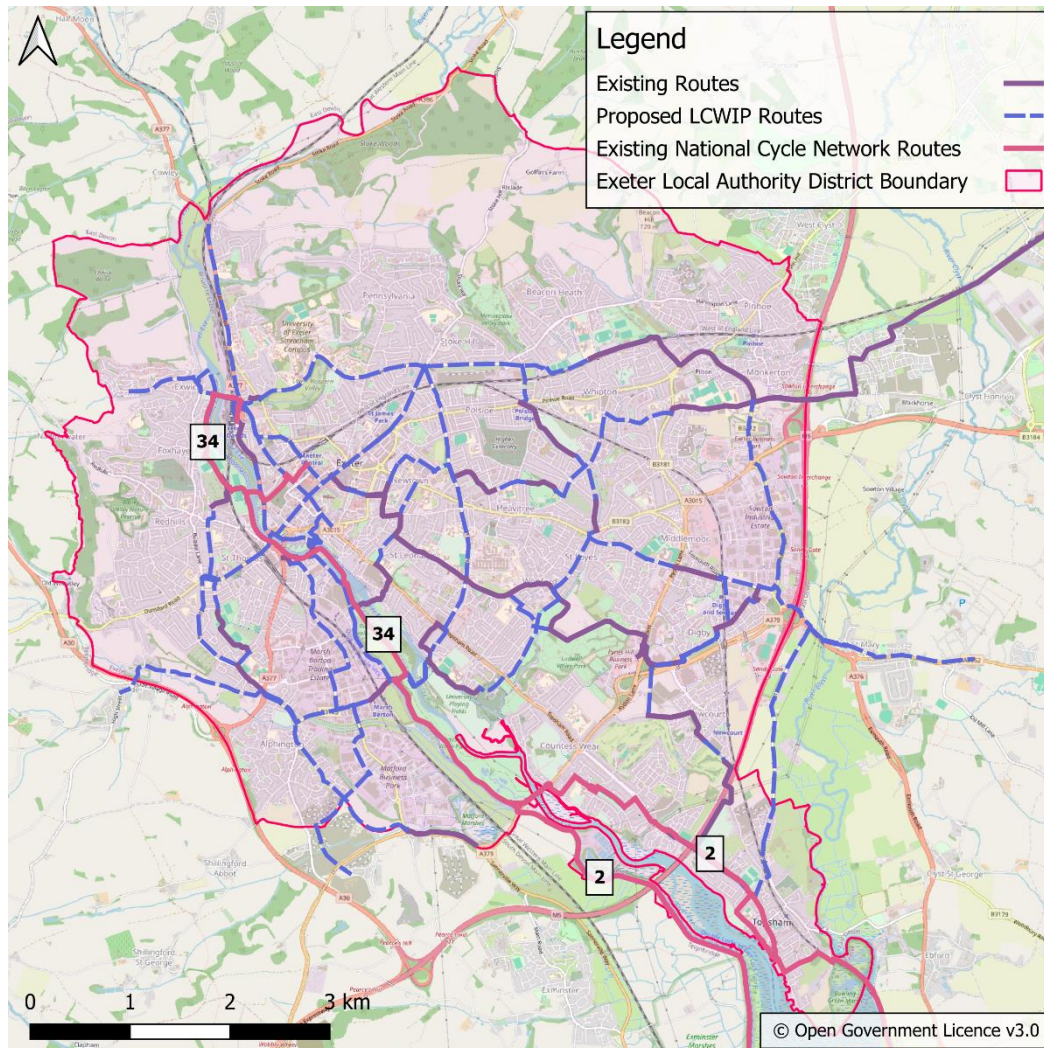


Figure 6.2 National Cycle Network and LCWIP routes in Exeter

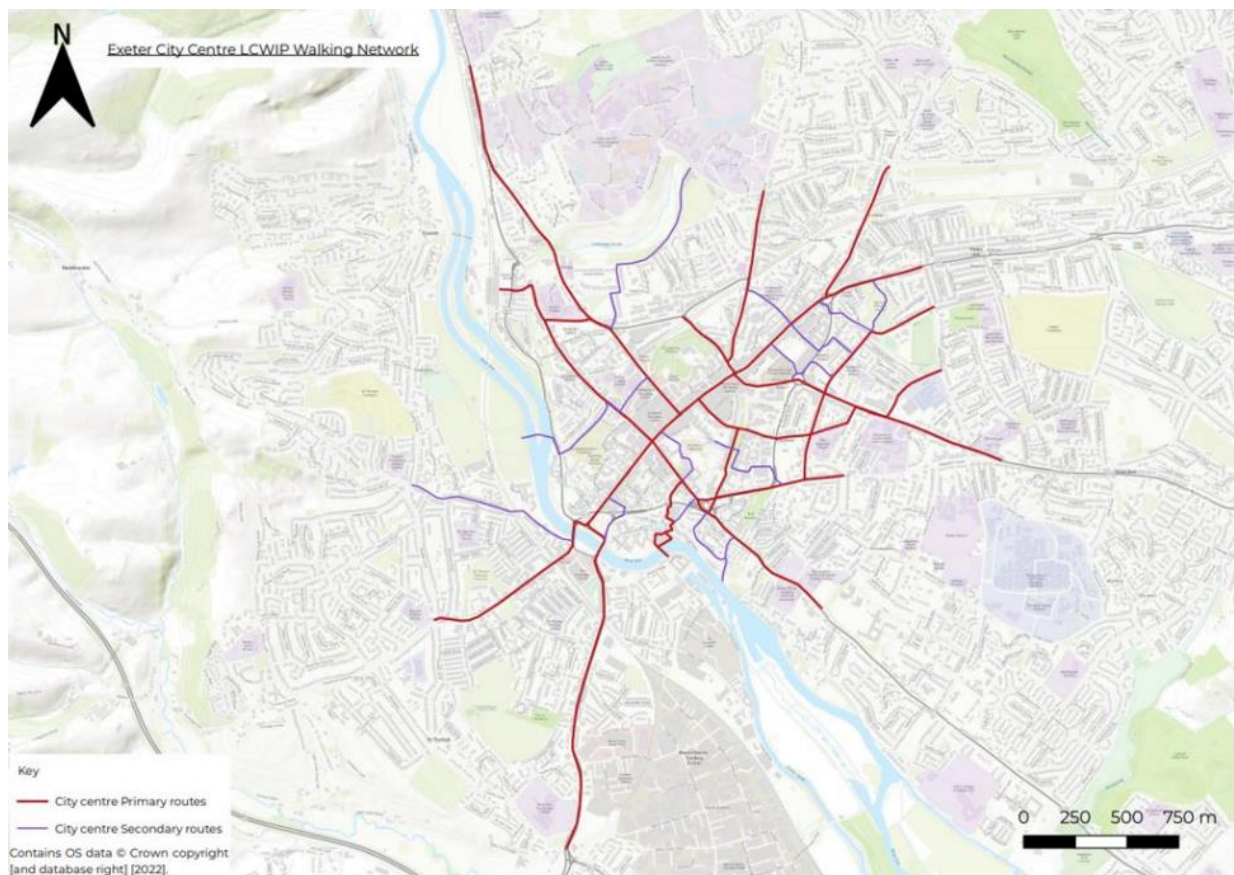


Figure 6.3 Exeter city centre LCWIP walking network

6.2. Modal Splits

- 6.2.1. As shown in Table 6.1, since 2011 the travel to work modal share for cycling has reduced from 6% to 5% for Exeter as a whole.

MSOA Location (residence)	Cycle TTW Mode Split		Cycle TTW numbers
	2011	2021	2021
Exeter	6%	5%	2,821
Pennsylvania & University	5%	4%	128
Mincinglake & Beacon Heath	6%	5%	159
Pinhoe & Whipton North	5%	4%	178
St James's Park & Hoopern	6%	5%	156
Exwick & Foxhayes	5%	4%	152
Heavitree West & Polsloe	8%	6%	229
Heavitree East & Whipton South	6%	5%	189
Central Exeter	6%	5%	205
St Leonard's	8%	5%	178
St Thomas East	7%	5%	218
Middlemoor & Sowton	5%	4%	284
St Thomas West	5%	4%	147
Wonford & St Loye's	6%	5%	202
Alphington & Marsh Barton	7%	5%	165
Countess Wear & Topsham	7%	6%	234

Table 6.1: Cycle Travel to Work Census data

- 6.2.2. The TTW work cycling mode share for each area across Exeter are shown below in Figure 6.4. The modal split appears to be consistent across the district; varying between 4% and 6%.
- 6.2.3. The highest cycle modal share across Exeter is observed in Countess Wear and Topsham (6%). This reflects that this area is close to higher quality routes, such as the Exe Estuary Trail and is within an accessible distance to significant employment sites both within Topsham itself and in Exeter. Conversely, mode splits of less than 4% are prevalent in the north of the district. This reflects a combination of lack of dedicated infrastructure and steep topography.

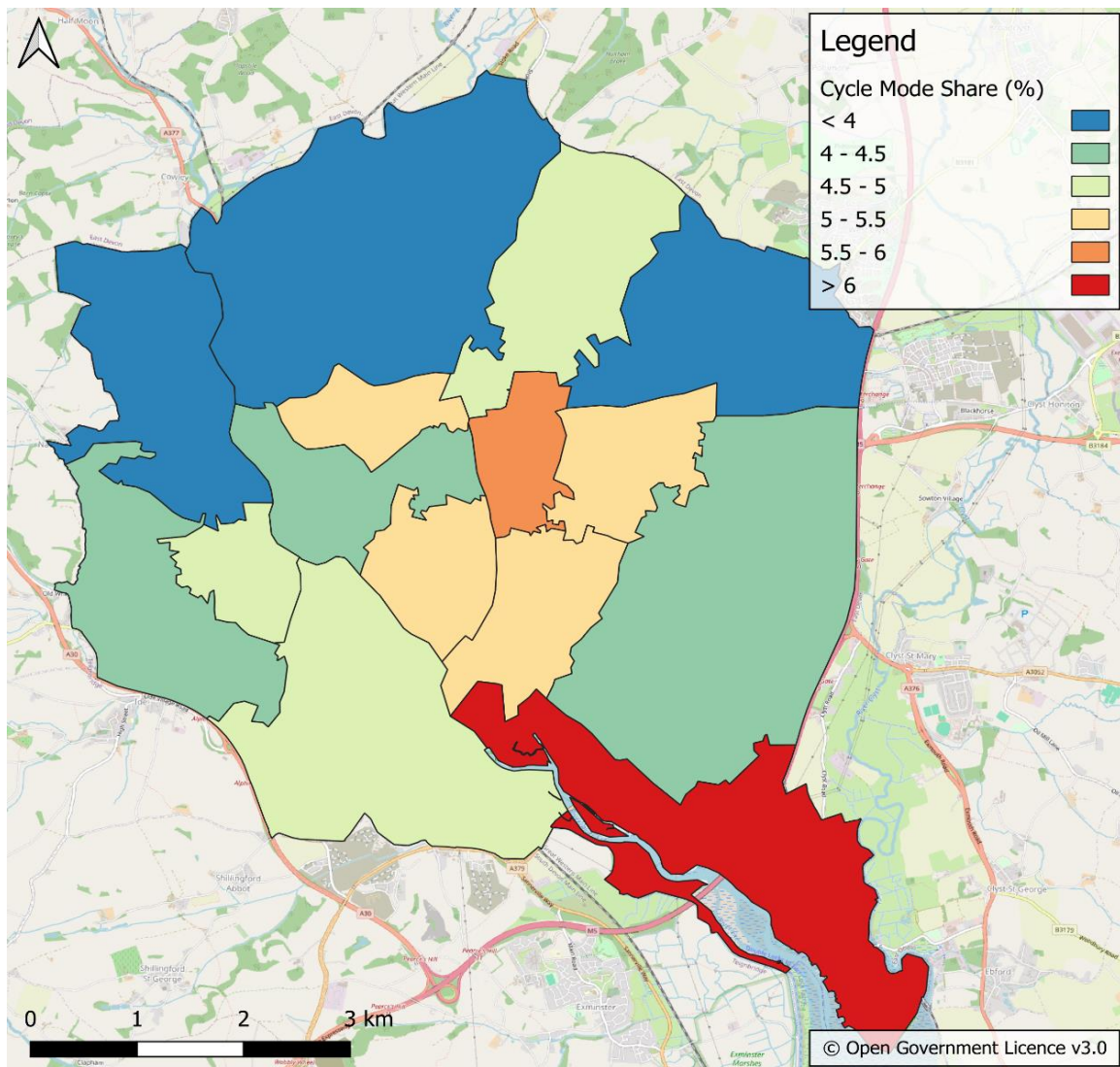


Figure 6.4: Cycling TTW mode split across Exeter

6.3. Usage

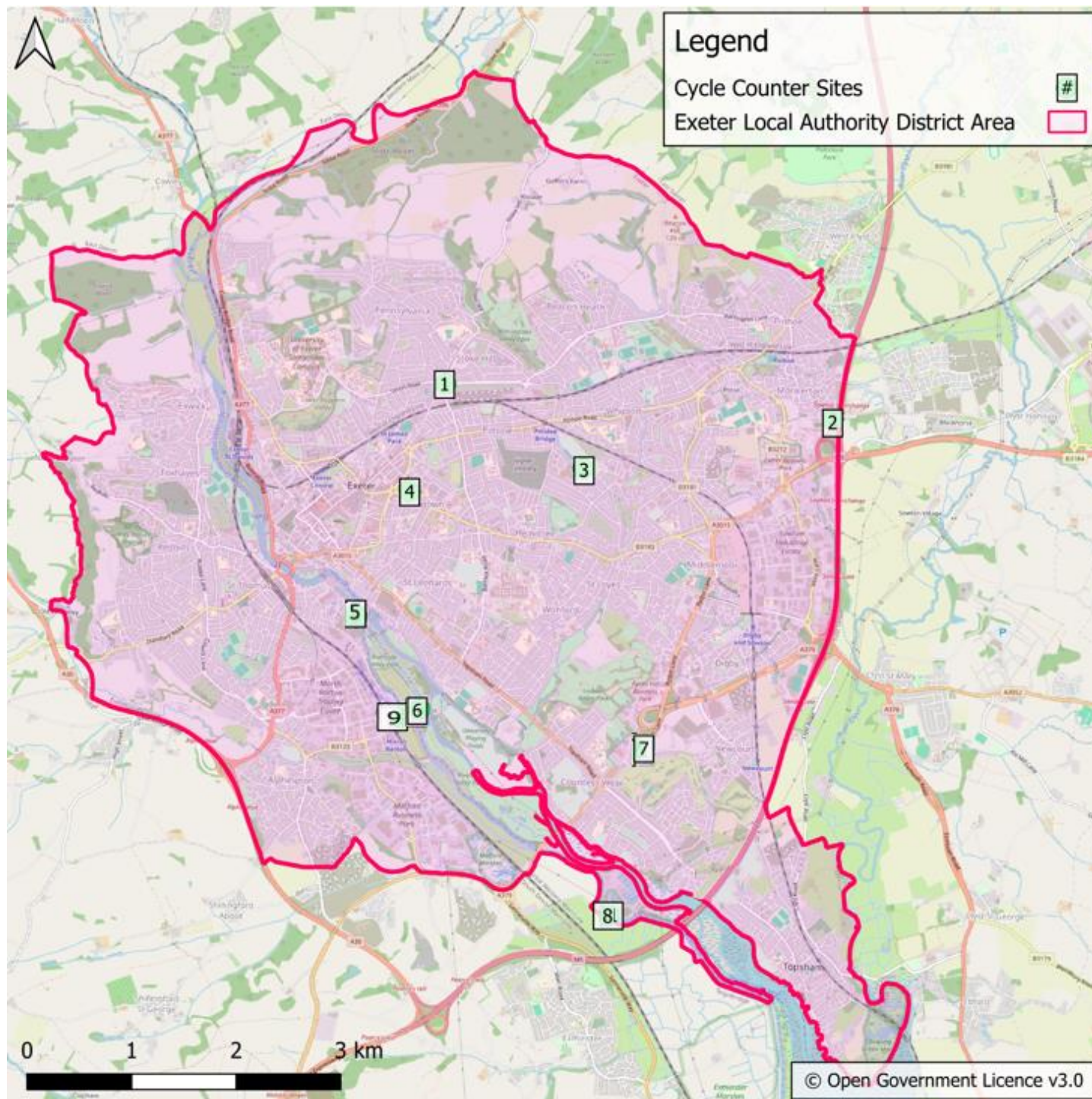


Figure 6.5 Map showing the location of cycle counter sites across Exeter

- 6.3.1. While there are numerous automatic cycle counters across the Exeter area, usage data in this report is based on 9 specific sites that have at least five years of data. These locations, illustrated in Figure 6.5 provide a basis for reviewing changes in cycle activity over time. The associated AADT (annual average daily traffic) data for these sites are presented in Table 6.2 (Note that on some occasions data from adjacent years has been used as a substitute for unavailable data).
- 6.3.2. There is variance in the total change in cycle use; ranging from -14.4% at Rydon Lane South to +75.2% at Clapperbrook Lane near the new Marsh Barton Station. With the exception of Exminster Canal Causeway and Clapperbrook Lane, the 2019 figures are greater than both the 2014 and 2024

data, representing a temporal peak in cycling across the district. This could be attributed to more home working post COVID pandemic.

Number	Location	2014	2019	2024	Total Change
1	Lower Prince Charles Road	165	182	158	-4.2%
2	Redhayes Bridge	115	177	159	38.3%
3	Hamlin Lane Playing Fields	133	-	144	8.3%
4	Triangle Car Park	78	89	80	2.6%
5	Haven Banks	949	966	879	-7.4%
6	Salmonpool Swing Bridge	926	972	823	-11.1%
7	Rydon Lane South	202		173	-14.4%
8	Exminster Canal Causeway	305	372	474	55.4%
9	Clapperbrook Lane	427	408	748	75.2%

Table 6.2 AADT cycle flows at main cycle counters

6.4. Daily profile

6.4.1. During the late evening and early morning, i.e. between 20:00 and 06:00, cycle flows are low, at less than 10 cycles per hour. Across most cycle count sites, significant peaks are exhibited in the morning at approximately 8am and in the afternoon around 5pm, demonstrating commuter journeys. Exminster Canal Causeway) exhibits a different trend, with an 11am peak shown and a plateau respectively – suggesting more leisure usage. The greatest flows at Clapperbrook Lane and Salmonpool Swing Bridge show a combination of these features, perhaps demonstrating a multi-usage of these paths for both commuting and leisure purposes.

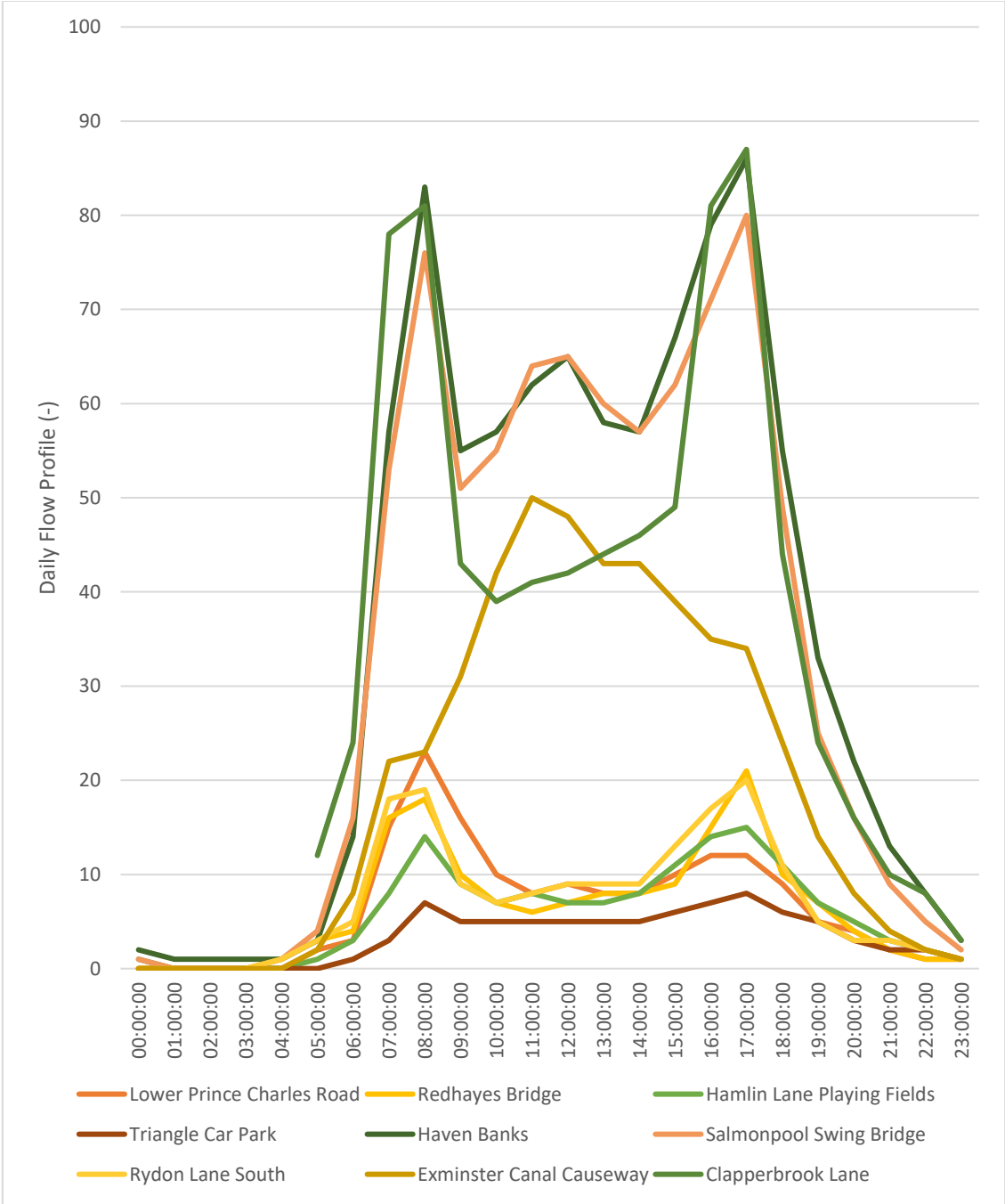


Figure 6.6 Daily flow profile at Exeter cycle count sites (2024)

6.5. Seasonality

- 6.5.1. To gain an indication of how cycle usage fluctuates throughout a year the seasonality values for each month in 2024, with the yearly average as 1.00 (used as a benchmark for comparison), is shown in Figure 6.7 Cycle seasonality for count sites in Exeter. Cycle figures can fluctuate significantly depending on weather conditions, which may influence variations on usage. Whilst assumptions are made about seasonality, it is not actually recorded against cycle uptake.
- 6.5.2. In 2024 these 7-day patterns of data exhibited a clear pattern of seasonality. Flows are highest in the summer months, perhaps in accordance with warmer weather and thus more favourable cycling conditions. Conversely, flows are lowest in the winter months. The difference is quantified by an approximate increase of 50% in flows between winter and summer months.

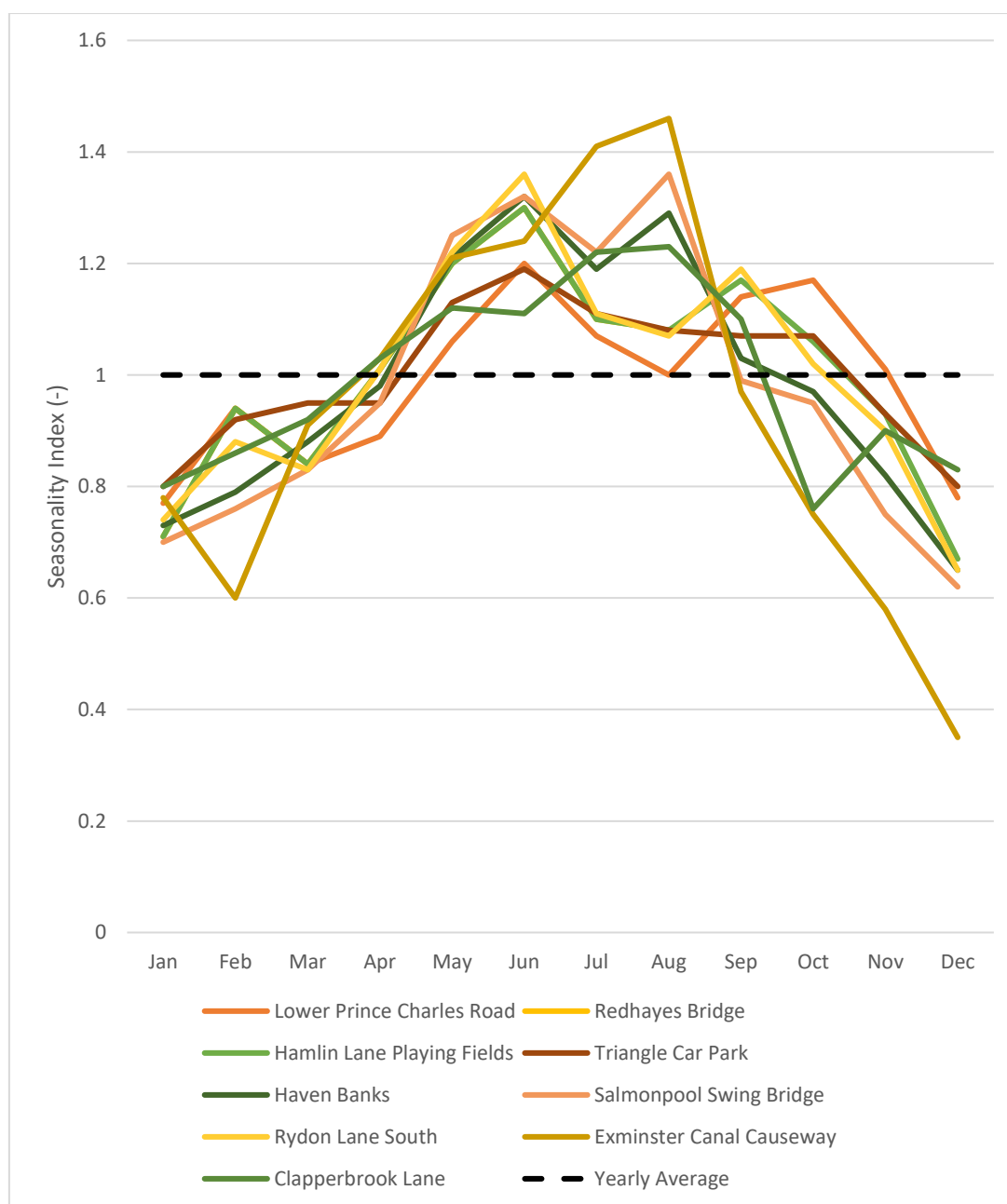


Figure 6.7 Cycle seasonality for count sites in Exeter

7. Public Transport – Bus

7.1. Introduction

- 7.1.1. This section explores the bus offer across Exeter and trends in travel for bus services across the district and the county (some data is not available at the district level). Devon County Council published their original Bus Service Improvement Plan (BSIP)⁷ in Autumn 2021 and published an update in June 2024. Along with setting out plans and aspirations, the document provides analysis of the trends in public transport offerings and take-up across the county, referenced in this section.
- 7.1.2. Exeter has well established bus links both within the district and to surrounding towns. Cranbrook and Exmouth are linked to Exeter by high-frequency routes 4 and 57, whilst there are also services operating at least hourly from Exeter to; Exeter Airport (4A), Honiton/Axminster via Ottery St Mary (44/44A), Honiton via Sidmouth (9) and Seaton via Sidmouth (9A). Exeter is also linked to Cullompton (route 1/1A), Tiverton (55/355), Crediton (5/5A/5B/5C), and to Newton Abbot (2/7/39).
- 7.1.3. Table 7.1 contains a summary of regular bus services from Exeter to elsewhere in Devon, including the operator, frequency, and the district which they connect Exeter with. These are all regular services, varying from a 15-minute frequency to one journey a day. The vast majority are covered by Stagecoach, however some services are operated by AVMT (Axe Valley Mini Travel), Greenslades, Country Bus and Dartline. Table 7.2 lists the bus services that operate within Exeter, which are covered by Stagecoach, Dartline, and Greenslades.

Service	Route from Departure Point in Exeter	Operator	Frequency	Connecting District
1/1A	Bus Station-Pinhoe-Broadclyst-Cullompton-Tiverton	Stagecoach	15 minutes	Mid Devon
2	Bus Station-Exminster-Dawlish-Teignmouth-Newton Abbot	Stagecoach	20 minutes	Teignbridge
4	University-St. Davids-City Centre-Honiton Road-Cranbrook	Stagecoach	15 minutes	East Devon
4A	St. Davids-City Centre-Honiton Road-Exeter Airport	Stagecoach	60 minutes	East Devon
5	Bus Station-Cowley Bridge-Crediton	Stagecoach	1/2 per hour	Mid Devon
5A	Bus Station-Crediton-North Tawton-Hatherleigh-Okehampton	Stagecoach	2 hourly	Mid Devon
5B	Bus Station-Crediton-North Tawton-Torrington-Bideford-Barnstaple	Stagecoach	6 journeys	Mid Devon
5C	Bus Station-Crediton-Lapford-Chawleigh-Chulmleigh	Stagecoach	2 hourly	Mid Devon
6A	Bus Station-Tedburn St. Mary-Whiddon Down-Okehampton Station	Stagecoach	7 journeys	West Devon
7	Bus Station-Kingsteignton-Newton Abbot-Totnes	Stagecoach	Hourly	Teignbridge
9	Bus Station-Newton Poppleford-Sidmouth-Honiton	Stagecoach	Hourly	East Devon
9A	Bus Station-Newton Poppleford-Sidmouth-Sidford-Seaton	Stagecoach	Hourly	East Devon
X30	Bus Station-Honiton-Colyton-Seaton	Stagecoach	3 journeys	East Devon
38	Bus Station-Drumbridges-Ashburton-Buckfastleigh-Ivybridge	Stagecoach	5 journeys	Teignbridge
39	Bus Station-Chudleigh-Bovey Tracey-Heathfield-Newton Abbot	Stagecoach	Hourly	Teignbridge
44/44A	Bus Station-Ottery St Mary-Honiton-Axminster-Millwey Rise	Stagecoach	Hourly	East Devon
52	Sidwell Street-Sidford-Beer-Seaton	AVMT	1 journey	East Devon
55	Bus Station-Stoke Canon-Bickleigh-Tiverton	Stagecoach	20/30 minutes	Mid Devon
57	Bus Station-Topsham-Lympstone-Exmouth	Stagecoach	20 minutes	East Devon
58	Bus Station-Woodbury Salterton-Woodbury-Exmouth	Stagecoach	5 journeys	East Devon
58A	Bus Station-Airport-Woodbury-Exmouth	Stagecoach	1 journey	East Devon
173	Sidwell Street-Drewsteignton-Chagford-Moretonhampstead	Stagecoach	4 journeys	Teignbridge
355	Bus Station-Stoke Canon-Thorverton-Silverton-Bickleigh-Tiverton	Stagecoach	7 journeys	Mid Devon
356	Sidwell Street-Aylesbeare-Ottertton-East Budleigh-Budleigh Salterton	Greenslades	1 journey	East Devon
358	Bus Station-Topsham-Woodbury-Ottertton	Stagecoach	1 journey	East Devon
359	Sidwell Street-Longdown-Dunsford-Moretonhampstead	Country Bus	2 hourly	Teignbridge
360	Sidwell Street-Ide-Dunchideock-Christow-Bridford	Stagecoach	4 journeys	Teignbridge
366	Sidwell Street-Shillingford-Kennford-Kenn	Dartline	1 journey	Teignbridge
369	Sidwell Street-Crediton-Sandford-Morchard Bishop	Stagecoach	5 journeys	Mid Devon

Table 7.1 Bus services to outside of Exeter

⁷[National Bus Strategy - Devon's Response - Travel Devon](#)

Service	Route	Operator	Frequency
A	Alphington-St.Thomas-Exeter City Centre	Stagecoach	15 minutes
B	Exeter Science Park-Tithebarn Way-Exeter-Marsh Barton-Matford-Exminster	Stagecoach	20 minutes
C	Matford Park & Ride-Marsh Barton-Exeter City Centre-Heavitree-Sowton Park & Ride	Stagecoach	20 minutes
E	City Centre-St. Thomas-Redhills-Exwick	Stagecoach	12 minutes
F1	Exeter City Centre-Union Road-Prince Charles Road-Savoy Hill	Stagecoach	Hourly
F2	Exeter City Centre-Union Road-Prince Charles Road-Summerway	Stagecoach	Hourly
G	Hamlin Gardens-Hanover Road-Exeter City Centre-The Quay	Greenslades	Hourly
H	St. Davids Station-Central Station-Exeter City Centre-RD&E Hospital-Wonford-Pynes Hill-Digby	Stagecoach	30 minutes
I	Digby-Whipton Barton-Whipton-Exeter City Centre-Countess Wear-Newcourt-Digby	Stagecoach	20 minutes
J	Digby-Newcourt-Countess Wear-Exeter City Centre-Whipton-Whipton Barton-Digby	Stagecoach	20 minutes
K	Cowley Bridge-Exeter City Centre-Mount Pleasant-Pennsylvania	Stagecoach	30 minutes
M	Exeter City Centre-Mount Dinham	Dartline	2 journeys
NPR3	Sowton Park & Ride – Nightingale Hospital – Science Park P&R	Dartline	30 minutes
P	Pinhoe-Beacon Heath-Stoke Hill-Mount Pleasant-Exeter City Centre-St. Thomas-Crossmead	Stagecoach	30 minutes
PR3	Digby Park & Ride-Sowton Park & Ride-RD&E Hospital	Dartline	15 minutes
R	Rifford Road-Topsham Road-Exeter City Centre-Heavitree-Thornpark Rise-Broadfields-Rifford Road	Stagecoach	20 minutes
S	Rifford Road-Broadfields-Thornpark Rise-Heavitree-Exeter City Centre-Topsham Road-Rifford Road	Stagecoach	20 minutes
T	Woodbury-Topsham Quay-Countess Wear-Topsham Road-Exeter City Centre	Dartline	3 journeys
U	Exeter City Centre-Union Road-Sylvan Park	Dartline	3 journeys
UNI Night	St. Luke's Campus-Exeter City Centre-Streatham Campus	Stagecoach	30 minutes (Weds, Fri, Sat nights only)

Table 7.2 Bus Services within Exeter

7.2. Bus Patronage

- 7.2.1. Figure 7.1, taken from the 2024 BSIP, shows that the total patronage on Devon's bus network in 2018/19 was around 23.7 million, a 10% reduction on 2011/12. During the COVID-19 pandemic, patronage dropped to a low of 8.1 million per year (in 2020/21), but since then, numbers have shown a steady recovery. In 2023/24, passenger numbers increased by 2.2 million over 2022/23, to 18.5 million.

7.2.2. From January 2023, the Department for Transport introduced the £2 fare cap, supporting operators to implement cap on eligible single tickets for all bus passengers. This was increased to £3 at the start of 2025. Although the £2 fare cap increased bus patronage by an average of 7% in Devon (Devon County Council’s BSIP 2024), it is not yet known how the increase to £3 has impacted patronage.

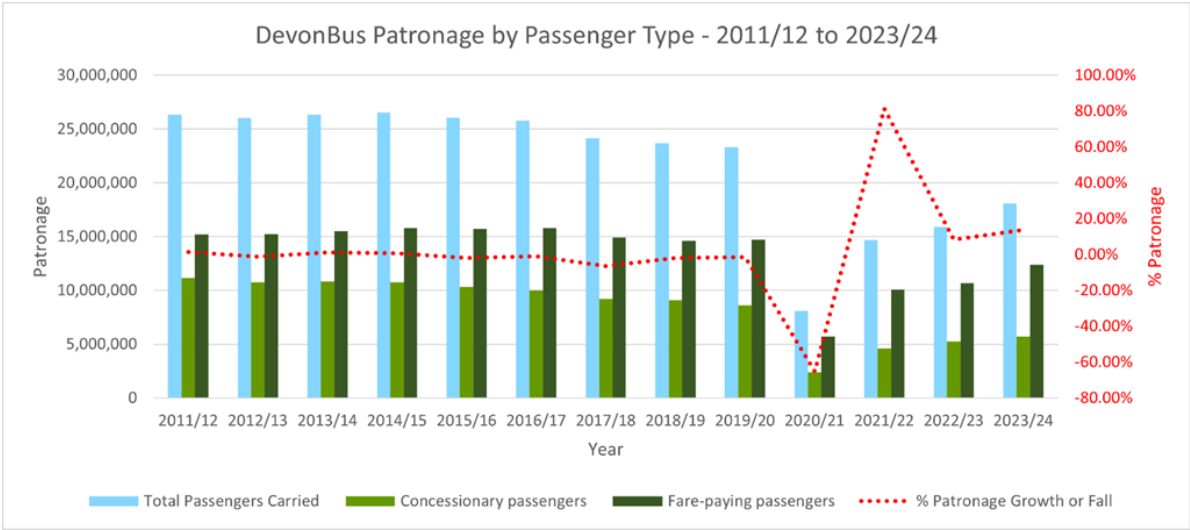


Figure 7.1 DevonBus Patronage by Passenger Type - 2011/12 to 2023/24

7.2.3. It should be noted that these overall figures masks variation across the county. For example, growth in services attached to new housing developments, such as Cranbrook, may offset or obscure declines in other areas. While services tend to be stronger in locations with higher population density and growth, there is an underlying trend of continued decline in more rural and less populated areas.

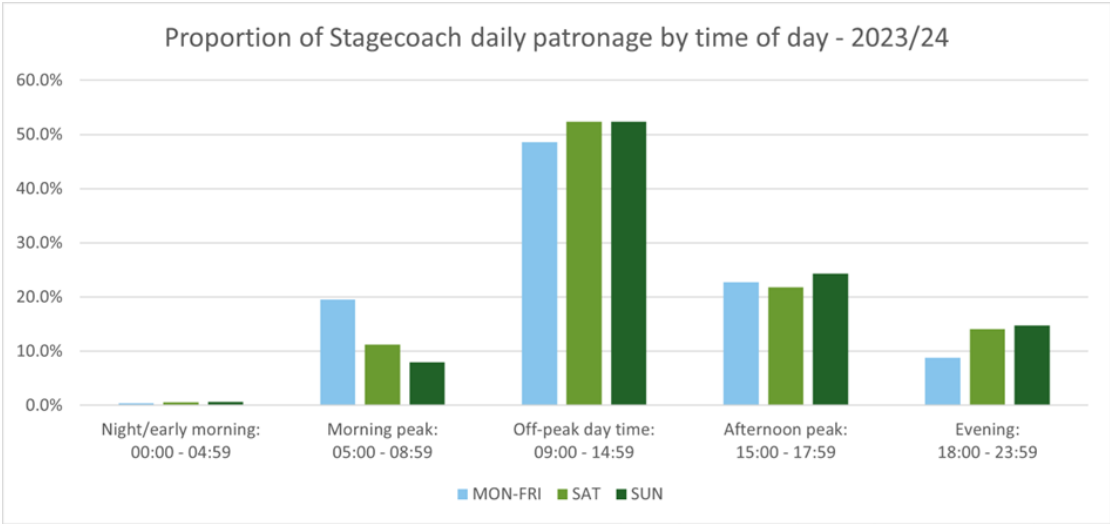


Figure 7.2 Stagecoach SW patronage across the day

7.2.4. According to Stagecoach South West data for Q1 2023/4, average weekday patronage across the bus network was of the order of 60,000 per day, compared to 55,000 and 20,000 per day on Saturdays and Sundays, respectively. On weekdays, nearly 20% of patronage occurs during the morning peak, compared to approximately 10% on Saturdays and Sundays (when a higher proportion of patronage occurs during the evening).

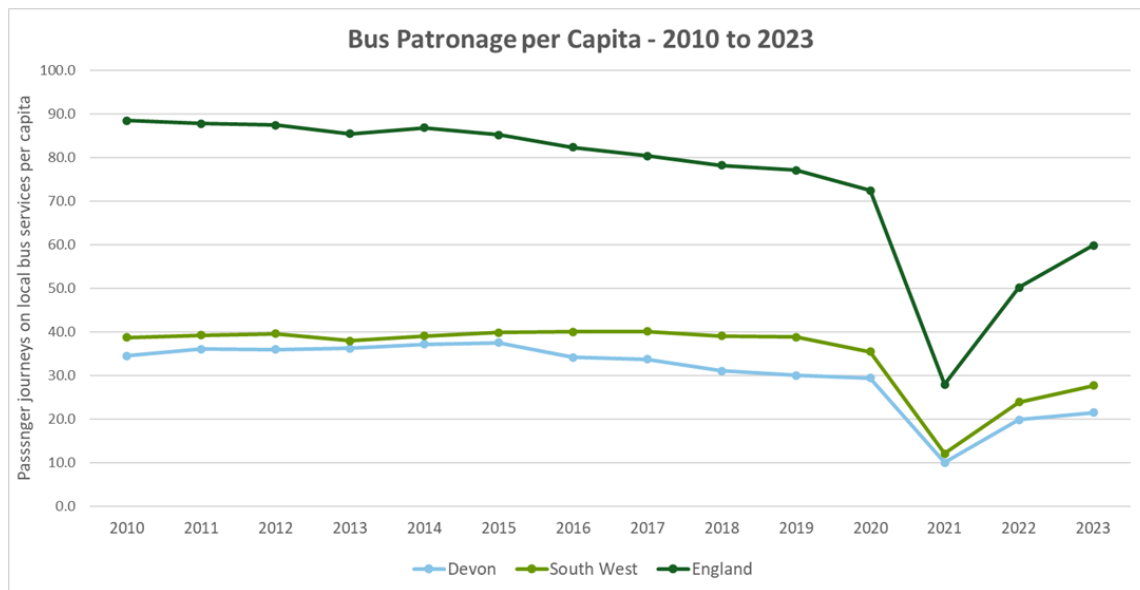


Figure 7.3 Bus patronage per capita – 2010 to 2023

- 7.2.5. Figure 7. shows that Devon bus patronage per capita declined from 37 trips per annum in 2014/15 to 21 trips per annum in 2023, according to Department for Transport data. Devon bus patronage per capita has typically been approximately 40% of the national (England) average and 80-90% of the regional (South West) average.

7.3. TTW Data

- 7.3.1. The Census TTW data in section 4 showed that between 2011 and 2021, the use of bus services for commuting across Exeter had declined. The magnitude of bus trips had significantly decreased alongside modal share; the latter decreasing from 9% to 5% across the district. This may be linked with the increase in working from home discussed in more detail in sections 0 and 4.4, as fewer trips are made overall.
- 7.3.2. TTW data highlights that the area with the highest bus mode share is Mincinglake & Beacon Heath (7.4%), followed by Wonford & St Loye's (6.7%). In the case of Mincinglake and Beacon Heath, the area's hilly topography may discourage walking and cycling, potentially contributing to higher bus usage. Both areas also rank highly on deprivation indices, which is often associated with lower levels of car ownership and greater reliance on public transport. The availability of high-frequency services such as the S and R routes likely supports this demand, helping to meet essential travel needs in communities where alternatives may be limited.
- 7.3.3. Disability statistics explored in section 3 show that the greatest proportion of those whose day-to-day activities are 'limited a lot' are found in Wonford & St Loye's (9.0%), which may also lead to greater reliance on public transport. This in conjunction with high-frequency services such as the S and R may increase bus ridership in these areas.

MSOA zone	Bus TTW Mode Split (2011)	Bus TTW Mode Split (2021)
Exeter	9.1%	4.8%
Pennsylvania & University	7.7%	3.4%
Mincinglake & Beacon Heath	13.0%	7.4%
Pinhoe & Whipton North	9.8%	3.8%
St James's Park & Hooper	6.7%	4.5%
Exwick & Foxhayes	10.1%	5.6%
Heavitree West & Polsloe	7.2%	3.2%
Heavitree East & Whipton South	10.8%	6.4%
Central Exeter	9.3%	6.6%
St Leonard's	5.8%	2.4%
St Thomas East	10.2%	5.2%
Middlemoor & Sowton	8.0%	4.2%
St Thomas West	8.8%	3.4%
Wonford & St Loye's	12.2%	6.7%
Alphington & Marsh Barton	7.5%	4.4%
Countess Wear & Topsham	9.1%	4.3%

Table 7.3: Bus Mode Splits for MSOA zones in Exeter (2011 and 2021)

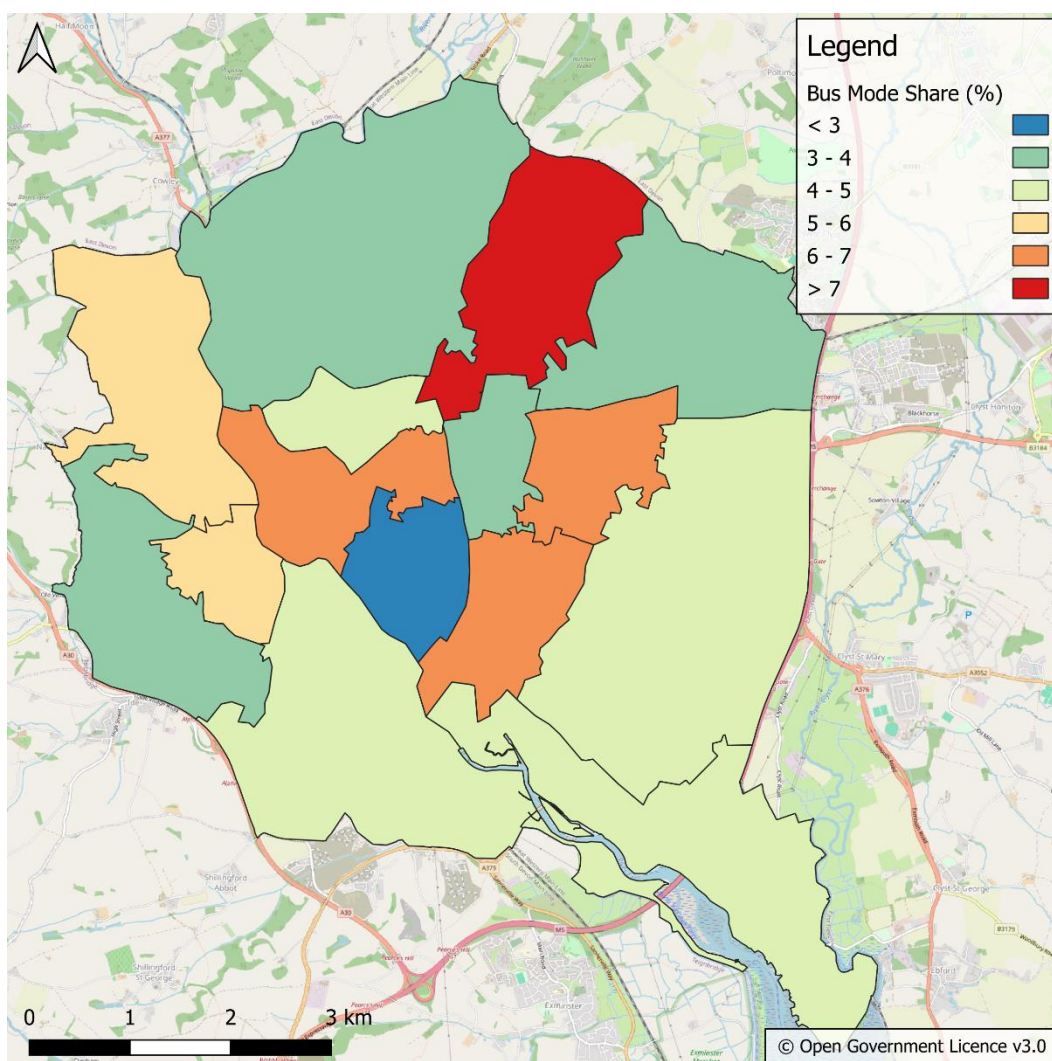


Figure 7.4: Bus TTW Mode Split across Exeter (2021)

8. Public Transport – Rail

8.1. Greater Exeter Rail Network

- 8.1.1. Situated at the confluence of two rail lines from London and for train services into the South West Peninsula, Exeter is at the heart of the Greater Exeter rail network. The rail network for the region is shown below in Figure 8.1.



Figure 8.1: Devon Railway Network

- 8.1.2. The mainline services to London provide high speed rail connections to settlements across the Peninsula, including Taunton and Plymouth. CrossCountry services also provide services heading north to Bristol, Birmingham and beyond.
- 8.1.3. In addition, there are a number of branch lines which connect Exeter to the largest settlements in the Greater Exeter area, including Exmouth, Newton Abbot and Crediton, and across the County, namely Barnstaple. These branch lines remove trips from busy road corridors and provide links to main line services.
- 8.1.4. In July 2023, Marsh Barton station opened, improving access to Exeter's largest trading estate and one of the largest employment sites in the region. The station is served by local services between Paignton and Exmouth, which also link it with the heart of Exeter.
- 8.1.5. In 2021, the Dartmoor line reopened to regular passenger services for the first time since 1972, connecting Exeter to Okehampton. Complementing the existing Okehampton station, the new purpose-built Okehampton Interchange station is planned to open in summer 2026, serving the growing east side of Okehampton, as well as providing easier access by train to Exeter for North Cornwall and West Devon residents (being just a short drive from the A30).
- 8.1.6. A nominal 1km catchment around each rail station, reflecting an approximately 10-minute walk, is shown in Figure 8.2 below. This shows the effective catchment of the "Devon Metro" system,

especially towards the city centre and in proximity to the St David’s area. There is a large gap in the district’s geographic centre near Heavitree, St Leonards and Wonford.

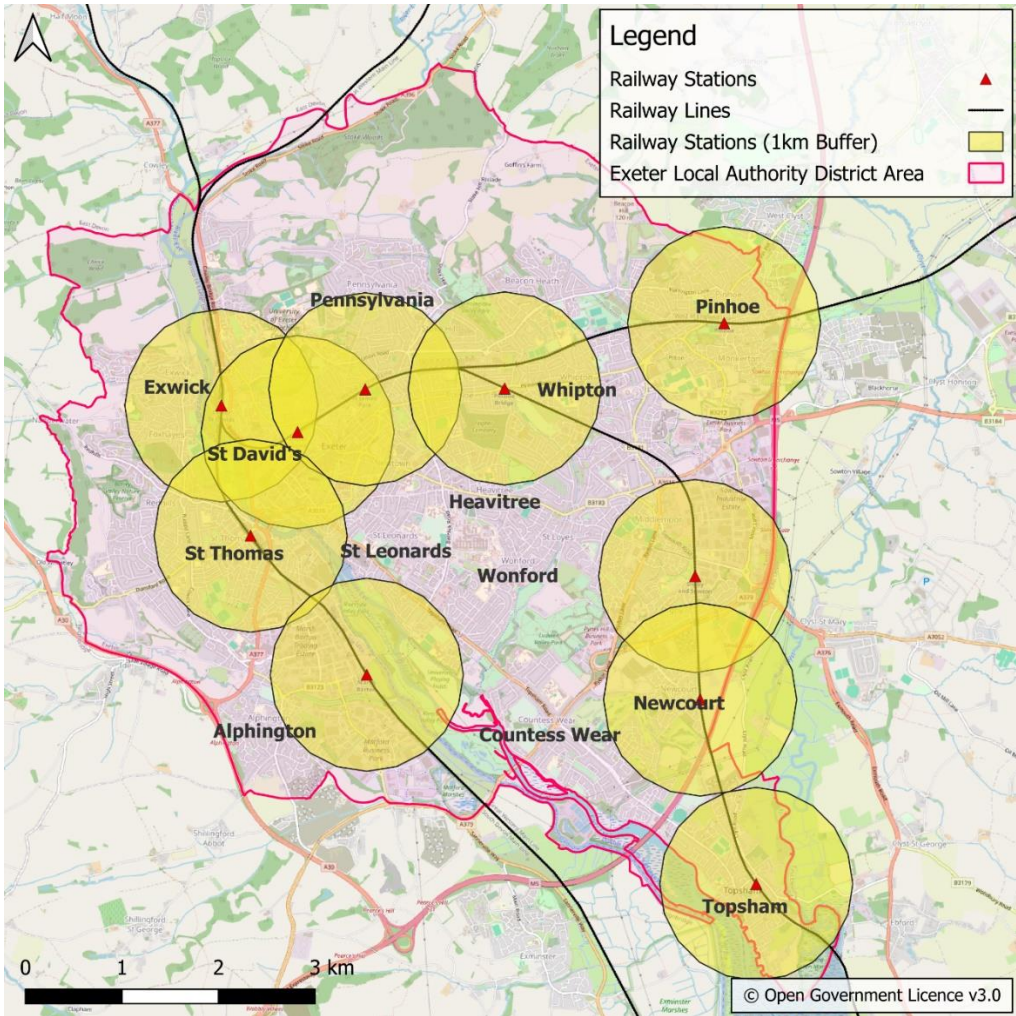


Figure 8.2: Exeter rail stations

8.2. Rail Patronage

8.2.1. Table 8.1 and Figure 8.3 set out the patronage of the nine rail stations in Exeter, and how usage has changed over the last 10 years. The percentage change has been calculated based on 2013/14, 2018/19 and 2023/24 figures.

	% Change 2013/14 to 2023/24	% Change 2018/19 to 2023/24
Digby and Sowton	4%	21%
Exeter Central	43%	10%
Exeter St. David’s	16%	4%
Exeter St. Thomas	59%	22%
Marsh Barton	n/a	n/a
Newcourt	n/a	22%
Pinhoe	248%	64%
Polsloe Bridge	71%	51%
St. James’ Park	115%	61%
Topsham	17%	9%
Total	102%	13%
GB passenger journeys	2%	-8%

Table 8.1 Percentage change in rail customers in Exeter

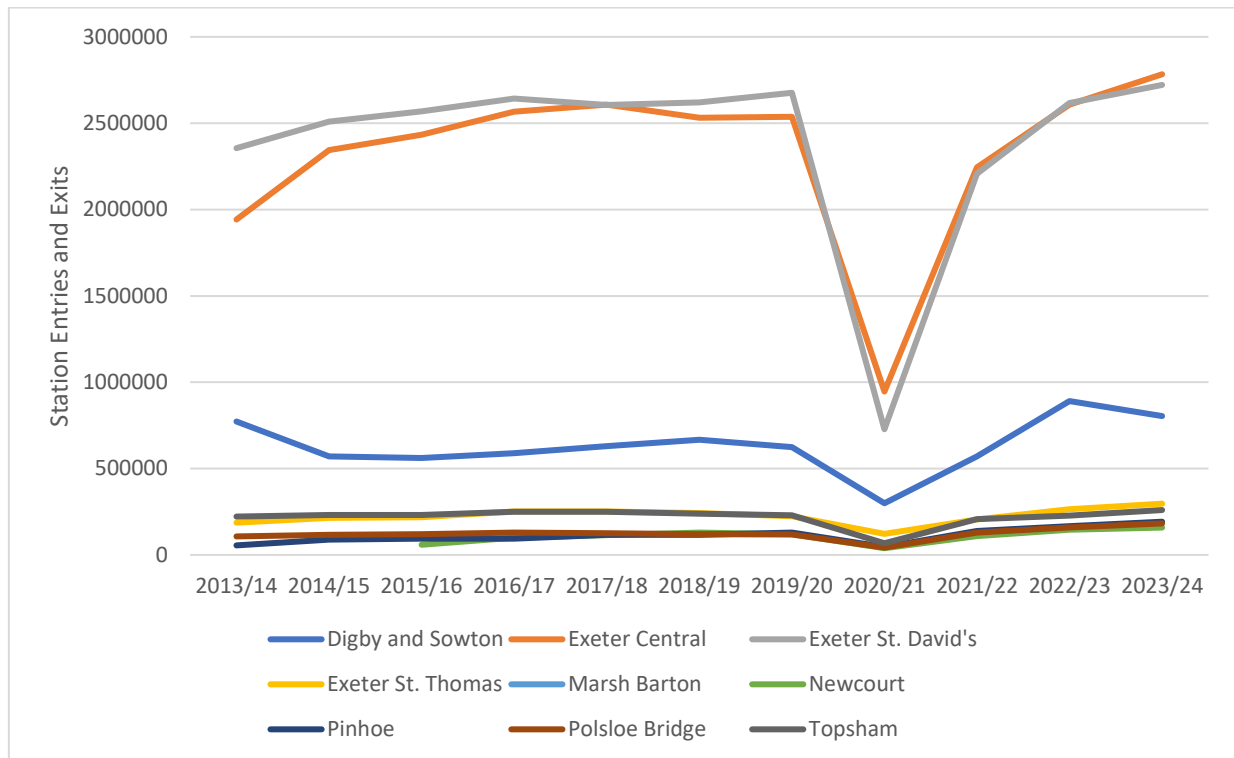


Figure 8.3 10-year change in Exeter station entries and and exits

- 8.2.2. Figure 8.3 identifies a mixture of usage trends across Exeter rail stations between 2013 and 2023, although there is a general pattern of a steady increase over time.
- 8.2.3. An obvious trend that affected patronage across the district is the sharp decline in station entries and exits in the year 2020/21, evidently in correlation with the COVID-19 pandemic. This has generally recovered to, and exceeded pre-pandemic levels, as can be seen in the 2018/19 to 2023/24 percentage changes on table 8.1, with increases ranging from 9% (Topsham), to 64% (Pinhoe).
- 8.2.4. The overall change in the 10 years between 2013/14 and 2023/24 is a significant 102%, compared with the overall for Britain, which is just 2%. In the same period, Pinhoe station experienced an increase of 248% (likely linked to a number of enhancements) and St. James' Park an increase of 155%, whilst Digby and Sowton usage increased by just 4%, and Topsham by 17%. Pinhoe and St. James' Park also had the largest increase in usage between 2018/19 and 2023/24 (64% and 61%, respectively), whilst St. David's and Topsham's usage increased by just 4% and 9%, respectively. The total increase in this period was 13%, exceeding the British average, which decreased by 8%.
- 8.2.5. This data is believed to provide a minimum estimate of actual rail travel numbers as people who have travelled on the trains without a ticket do not get recorded.

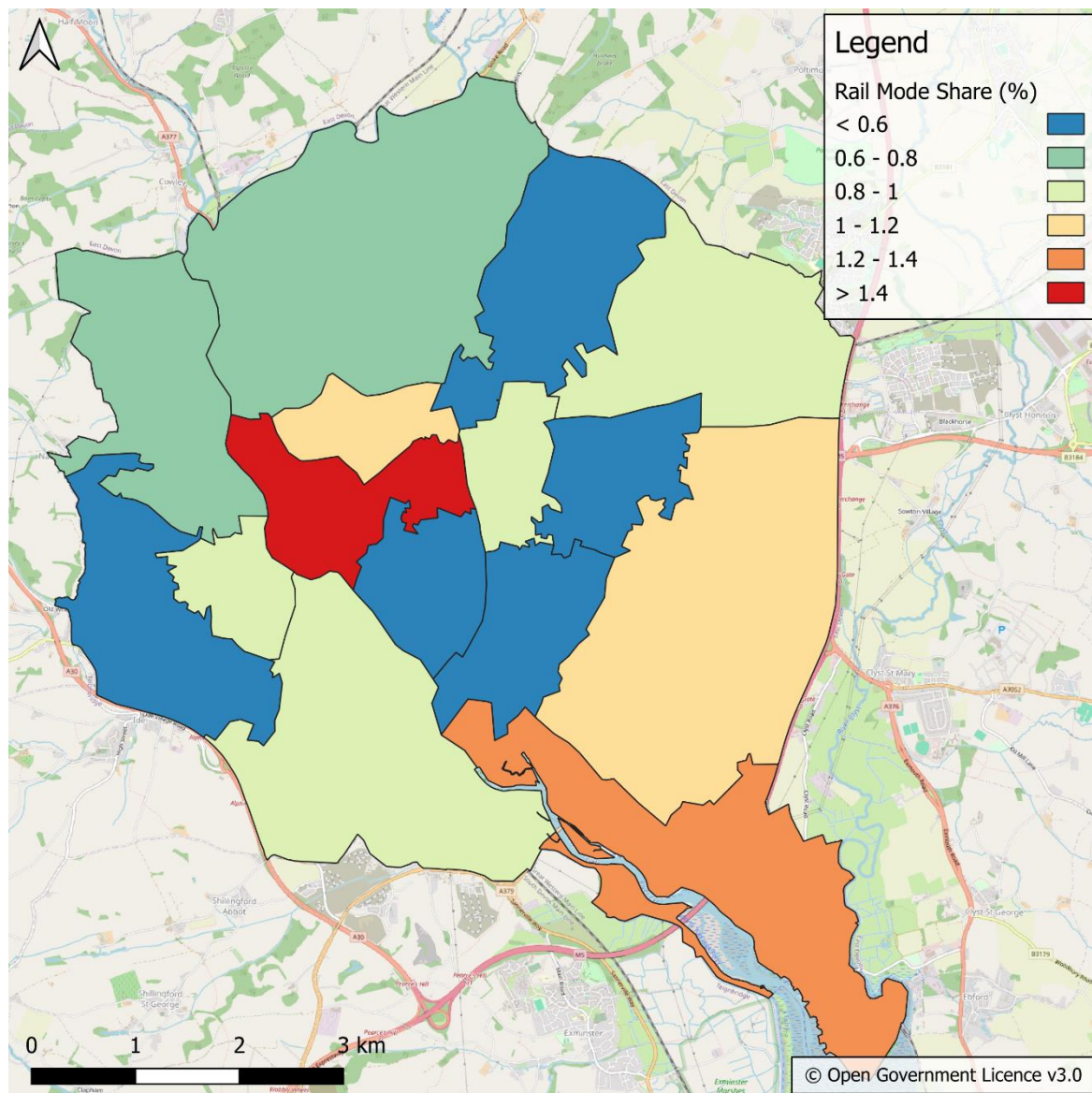


Figure 8.4 Rail Travel to Work mode share across Exeter

8.3. Travel to Work Data

8.3.1. The rail TTW mode share across Exeter is shown in Figure 8.4.

8.3.2. The mapping helps to emphasise the hot spots of rail usage. It also highlights that there is variable use across the area; with lower train use in the western, central-southeastern and northeastern portions of the district due to a lack of any rail stations in these areas. The greatest usage can be found in Central Exeter, closely followed by Countess Wear & Topsham. Despite having Devon's busiest railway station in terms of entries and exits, Central Exeter only has a minor proportion (1.6%) of the population with train travel as the primary method of travelling to work when compared with buses (6.6%)

8.4. Rail Capacity

8.4.1. The capacity of the rail line is identified through load factor analysis, which is typically published through the relevant route studies.

8.4.2. Load Factor information for the Greater Exeter area (which includes all Exeter stations) is presented in the 2015 Network Rail Western Route Study. 'Load factor' refers to the ratio of passengers to

available seats on a train, indicating how full services are during a given period. Figure 8.5 shows the 2023 predicted load factor for services arriving at Exeter St David's in the AM peak hour (08:00 – 08:59). It should be noted that this predicted 2023 value accounts for additional seats which were expected to be provided on branch line services.

- 8.4.3. This highlights that services on the West of England line east of Feniton and on the Avocet line south of Topsham are projected to be well within capacity (at a load factor of less than 70%). However, with additional passengers boarding as the trains approach Exeter Central, load factors increase, such that between Cranbrook and Exeter Central and between Digby & Sowton and Exeter Central, projected load factors exceed 100%. Therefore, commuters travelling from Exeter elsewhere by train were projected to experience significant crowding, particularly during the earlier parts of their journey.

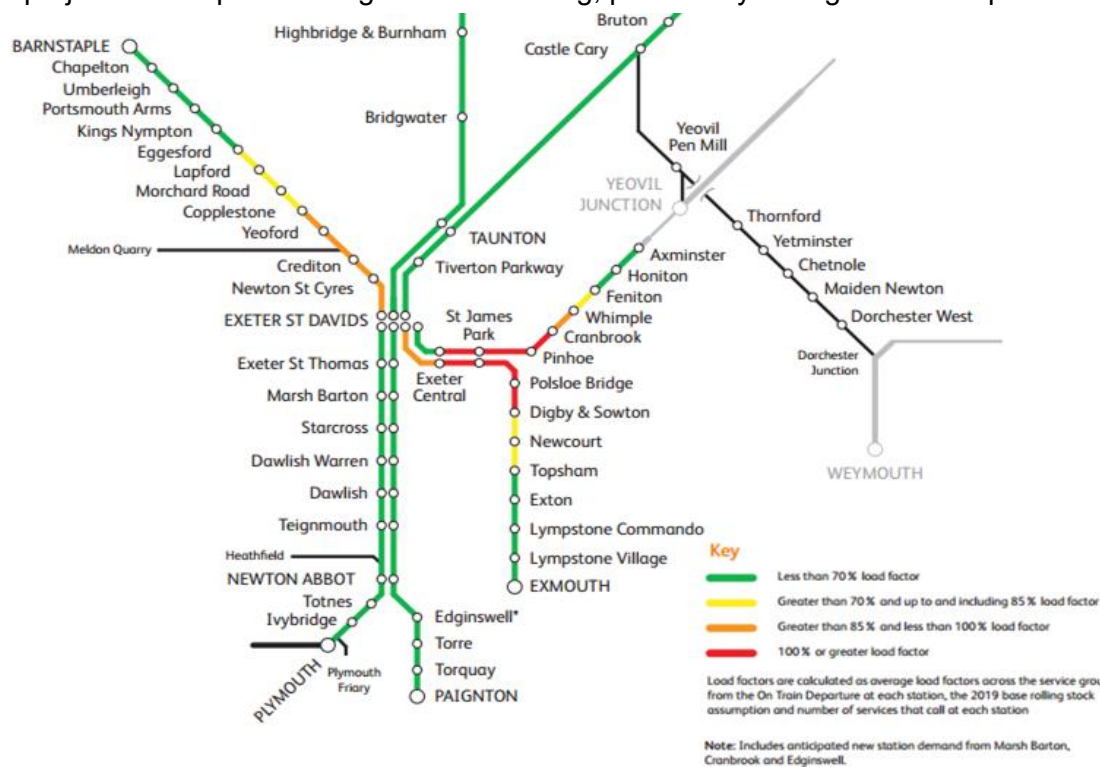


Figure 8.5: Estimated 2023 Load Factor from the 2015 Western Route Study on services arriving into Exeter St David's in AM peak

9. Vehicular Traffic

9.1. Introduction

- 9.1.1. This section explores the traffic levels and patterns on the local and strategic highway network in the Exeter area. This includes data on car ownership, traffic levels in the major road network, vehicle flow profiles, purpose splits and comparisons with national forecasts.

9.2. Car Ownership

- 9.2.1. Since 2011, the percentage of households with access to a car or van, as recorded in the Census, has increased, as illustrated by Table 9.1. Across the whole of the area, the number of households with access to a car has increased from 73.6% (35,919 households) in 2011, to 74.9% (39,206 households) in 2021.
- 9.2.2. There are variations in car ownership across the district; in Central Exeter only 46% of households had access to a car in 2021, while in Middlemoor and Sowton this was 88%.

Percentage of households with access to a car (%)			
	2011	2021	Change (percentage points)
Pennsylvania & University	86.6	86.0	- 0.6
Mincinglake & Beacon Heath	71.3	73.7	2.4
Pinhoe & Whipton North	81.3	83.9	2.6
St James's Park & Hoopern	60.8	64.2	3.4
Exwick & Foxhayes	80.4	78.4	- 2.0
Heavitree West & Polsloe	71.3	72.4	1.1
Heavitree East & Whipton South	69.7	73.8	4.1
Central Exeter	47.7	46.0	- 1.7
St Leonard's	73.7	74.7	1.0
St Thomas East	71.6	72.0	0.4
Middlemoor & Sowton	88.2	87.7	- 0.5
St Thomas West	79.7	80.9	1.2
Wonford & St Loye's	66.4	69.8	3.4
Alphington & Marsh Barton	78.8	79.1	0.3
Countess Wear & Topsham	77.2	81.6	4.4
Exeter (average)	73.6	74.9	1.3

Table 9.1: Percentage of households with access to a car

- 9.2.3. Across Exeter, in 2011 48% of households had access to one car/van, 21% had access to two cars/vans, and 5% had access to three or more cars/vans. In 2021 46% of households had access to one car/van, 22% had access to two cars/vans, and 7% had access to three or more cars/vans.
- 9.2.4. In Table 9.2, the average number of cars/vans per household is estimated, taking households with 3 or more cars/vans to have 3 cars/vans (as the exact number of cars is not specified for these households, meaning the average will be an underestimate).
- 9.2.5. This indicates that the average number of cars per household has increased slightly over this period by approximately 0.06 cars per household.

Estimated average number of cars per household in Exeter		
	2011	2021
Pennsylvania & University	1.30	1.31
Mincinglake & Beacon Heath	1.00	1.09
Pinhoe & Whipton North	1.21	1.32
St James's Park & Hoopern	0.85	0.95
Exwick & Foxhayes	1.13	1.16
Heavitree West & Polsloe	0.99	1.03
Heavitree East & Whipton South	0.98	1.08
Central Exeter	0.60	0.59
St Leonard's	1.03	1.05
St Thomas East	0.99	1.03
Middlemoor & Sowton	1.35	1.38
St Thomas West	1.17	1.27
Wonford & St Loye's	0.90	1.00
Alphington & Marsh Barton	1.13	1.16
Countess Wear & Topsham	1.12	1.24
Exeter	1.05	1.11

Table 9.2: Estimated average number of cars per household in Exeter

- 9.2.6. National data from the DfT Road use Statistics, shown below in Figure 8.1, show that average distance travelled per person has fallen since 2013 by 8%. However, the total miles travelled by car did increase between 2013 and 2023 by 9%. Both the total car miles and the average distance per person experienced a significant decrease of at least 25% in 2020 compared with 2019. This was due to travel restrictions as a result of Covid19. The total miles driven by car rose above pre-2020 levels by 2023, whereas the average distance travelled per person remained lower than it was in 2019 (by 7%). Throughout this period, the population rose steadily, experiencing a 7% increase between 2013 and 2023.

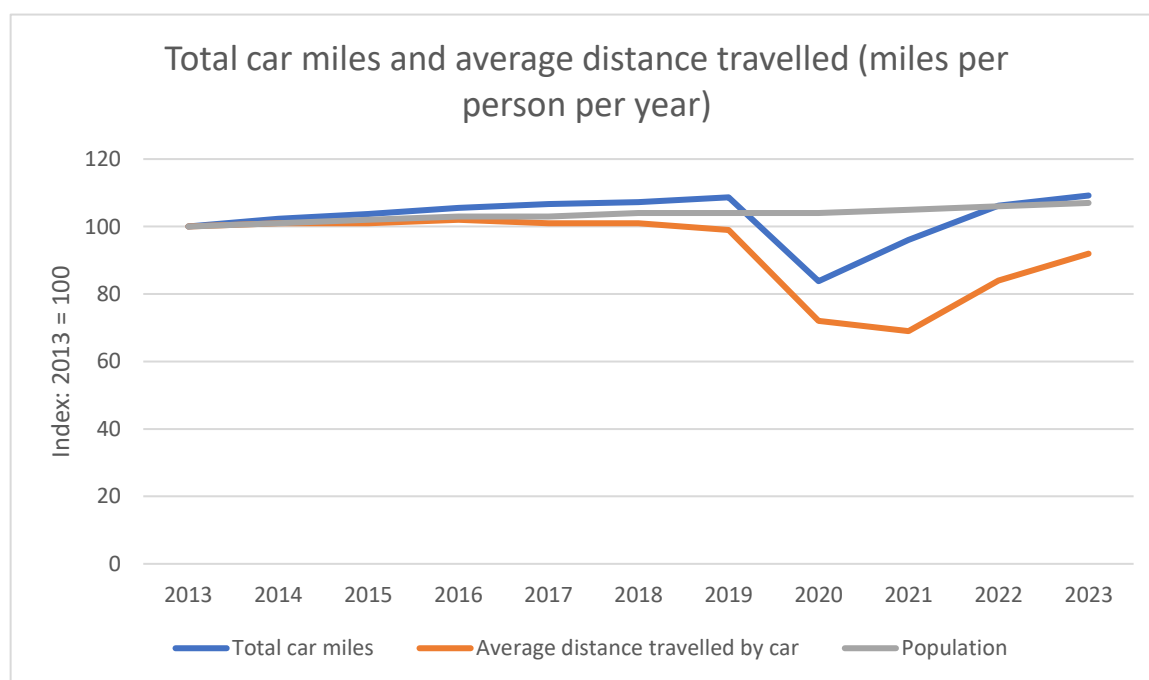


Figure 9.1: Total car miles, average distance travelled and population 2013 – 2023, indexed to 2013 (DfT: Road use statistics)

9.3. Strategic Road Network Data

9.3.1. Table 9.3 shows Annual Average Daily Traffic (AADT) flows and trends at the vehicle counters along the Strategic and Major Road Network (as shown in Figure 9.2) which are collected by the Department for Transport⁸. The M5 runs along the Eastern edge of Exeter and cuts across the Southern part of the city, whilst the A30 is located on Exeter's Western edge towards Okehampton, as well as on the East towards Honiton.

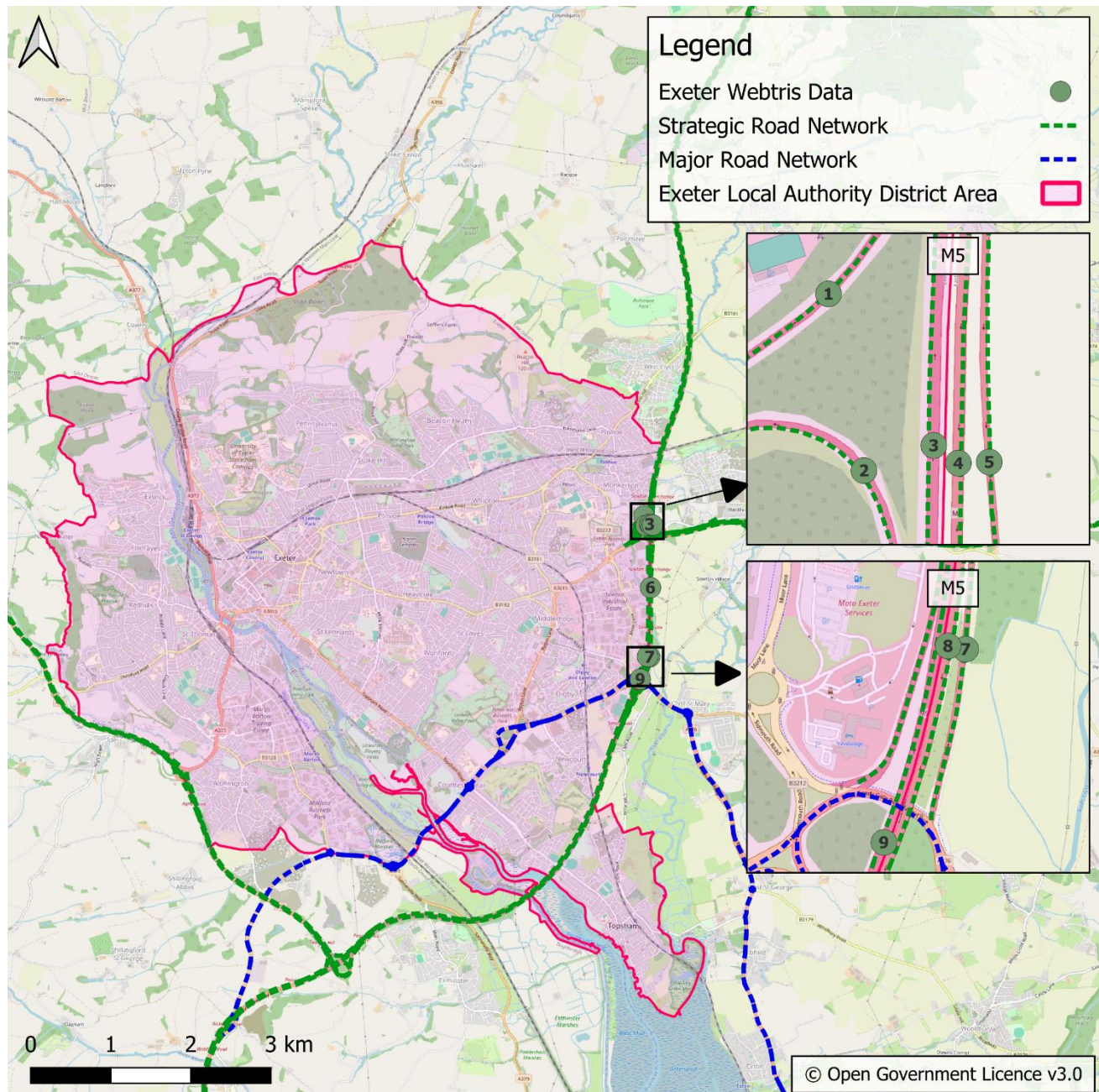


Figure 9.2: Location of Department for Transport Strategic Road Network Vehicle Counters

⁸ [Map Road traffic statistics - Road traffic statistics \(dft.gov.uk\)](https://www.dft.gov.uk/road-traffic-statistics)

Site No.	Site Name	Site Location	AADT			Annual Change	Total Change
			2015	2019	2024		
1	30360163	Link road from A30 eastbound to M5 J29 northbound	5,399	6,090	-	3.2%	13%
2	5066/1	Link road from M5 J29 northbound to A30	14,455	16,977	17,398	2.3%	20%
3	5066/2	M5 northbound within J29	26,834	27,386	27,246	0.2%	2%
4	5067/2	M5 southbound within J29	24,084	26,625	-	2.6%	11%
5	5067/1	M5 southbound exit for A30	6,031	6,789	-	3.1%	13%
6	30360129	M5 southbound between J29 and J30	42,522	41,805	-	-0.4%	-2%
7	5065/1	M5 J30 southbound exit	11,623	13,035	13,270	1.6%	14%
8	5065/2	M5 southbound within J30	29,329	31,440	32,157	1.1%	10%
9	5064/1	M5 northbound within J30	29,769	32,031	31,975	0.8%	7%

Table 9.3: AADT for Department for Transport Strategic Road Sites (2015, 2019 and 2024)

- 9.3.2. As shown in Table 9.3 above, the highest flows on the SRN in Exeter were on the M5, with over 60,000 vehicles per day recorded north and southbound within J30 (Sandygate).
- 9.3.3. The general trend from the data collected shows an increase in flows over the period 2015 - 2024. The largest increase (20%) was recorded at the link road from M5 J29 northbound to A30, whilst the smallest increase (2%) was at the M5 northbound within J29. However, it should be noted that the M5 southbound between J29 and J30 showed a slight decrease in flows between 2015 and 2019.
- 9.3.4. It may be noted that weekends and holidays are included within these figures, therefore they are incomparable with the data provided in section 9.4 below.

9.4. Local Highway Network Data

9.4.1. Figure 9.3 demonstrates where Devon County Council's Automatic Traffic Count (ATC) sites are located; including separation between vehicle counters situated on typical roads, the Major Road Network (MRN) and Strategic Road Network (SRN).

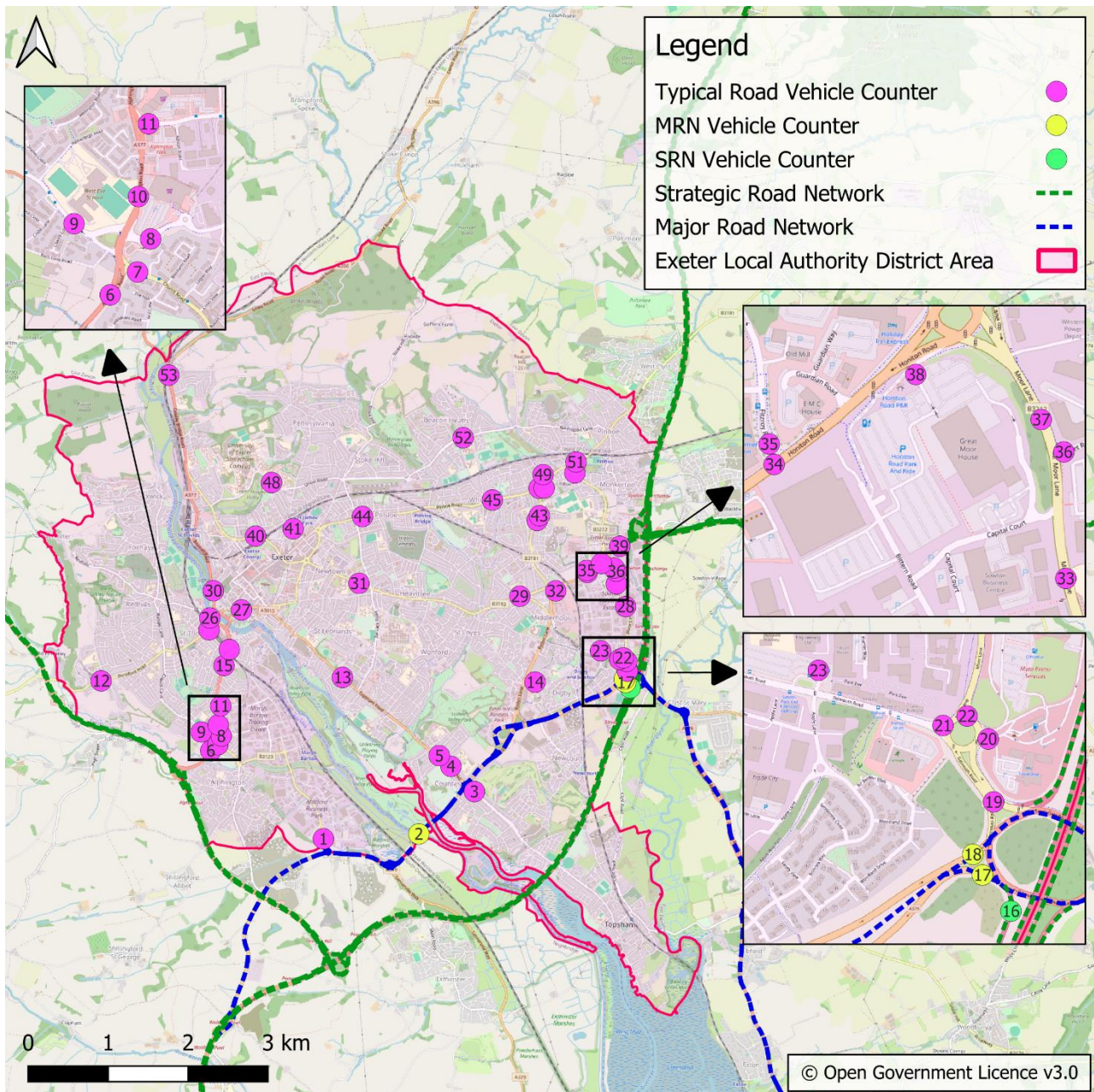


Figure 9.3: Location of Devon County Council's ATC sites

Site No.	Site Name	AADT			Annual Change	Total change
		2014	2019	2024		
1	Bad Homburg Way	23319	23888	19919 ¹	-2.4%	-17.1%
2	Bridge Road	31357	34376	32076	0.2%	2.2%
3	Topsham Road (Countess Wear East)	16648	17962	17308	0.4%	3.8%
4	Topsham Road (Countess Wear West)	25230	25988	24205	-0.4%	-4.2%
5	Topsham Road/Tollards Road	24689 ²	25483 ³	23468 ⁴	-0.7%	-5.2%
6	Alphington Road (Alphington Cross)		8234 ⁵	9033 ⁴	4.4%	8.8%
7	Church Road/Alphington Road		6701 ⁵	7043 ⁴	2.4%	4.9%
8	Marsh Green Road West (Sainsburys)		8597 ⁵	9122 ⁴	2.9%	5.8%
9	Cowick Lane (West Exe)	7549	7579 ³	7099 ⁶	-0.8%	-6.3%
10	Alphington Road (Sainsburys)	12185	12296	11569 ⁴	-0.6%	-5.3%
11	Marsh Barton Road (Alphington Road)	12470	12021	9298 ⁴	-3.8%	-34.1%
12	Dunsford Road	7523	7711 ⁷	7814	0.4%	3.7%
13	County Hall, Topsham Road	17299	17137	16785 ⁸	-0.3%	-3.1%
14	Russell Way (Rydon Lane)	15387	16162	14555 ⁴	-0.6%	-5.7%
15	Alphington Road/Sydney Road	27388	26259	24587 ⁴	-1.3%	-11.4%
16	Sandygate Roundabout (NB Off Slip)		14074⁹	13468⁴	-1.1%	-4.5%
17	Sandygate Roundabout (to Rydon Lane)		15115⁹	14151⁴	-1.7%	-6.8%
18	Sandygate Roundabout (from Rydon Lane)	12716	14536	13836⁴	0.9%	8.1%
19	Sandygate Roundabout (to services)	34169	37562	32161 ⁴	-0.7%	-6.2%
20	Exeter Services (Exit)	4931	6545	5195 ⁸	0.6%	5.1%
21	Sidmouth Road (EB, Services)	7847	9235	7544 ⁸	-0.4%	-4.0%
22	Moor Lane (SB, Services)	7498	7043	6819 ⁸	-1.1%	-10.0%
23	Sidmouth Road (Park & Ride Entry)	419	374	137 ⁴	-22.9%	-205.8%
24	Alphington Street (Willey's Avenue)	27671	25716	24597 ⁴	-1.4%	-12.5%
25	Cowick Street (Exeter St Thomas)	13535	12713	11571 ⁴	-1.9%	-17.0%
26	Okehampton Street	8029	7984	7249 ⁴	-1.2%	-10.8%
27	Western Way	30206	29203	27061 ⁴	-1.3%	-11.6%
28	Moor Lane/Kestrel Way	9632	9126	9803 ⁴	0.2%	1.7%
29	Honiton Road/Sidmouth Road	25419	25624	25387 ⁴	0.0%	-0.1%
30	Bonhay Road	12140 ¹⁰	12114 ⁷	12800 ⁴	0.6%	5.2%
31	Heavitree Road	16741	16532 ⁹	18656 ⁴	1.1%	10.3%
32	A3015 Middlemoor Link Road (SB)	3543	3489	3679 ⁴	0.4%	3.7%
33	Moor Lane (Nightingale Hospital)	11623	10701	11123 ¹¹	-0.6%	-4.5%
34	Honiton Road (Met Office)	20478	22244	22323 ¹¹	1.0%	8.3%
35	Fitzroy Road (Met Office)	1673	1602	528 ¹¹	-27.1%	-216.9%
36	Avocet Road (Exit onto Moor Lane)	2982 ¹²	2914	2370 ⁴	-3.7%	-25.8%
37	Moor Lane/Avocet Road	15873 ¹²	14682	14889 ⁸	-0.9%	-6.6%
38	Honiton Road Park & Ride	1092	1642 ⁷	482 ⁴	-14.1%	-126.6%
39	Honiton Road (M5 Junction 29)	27585	29487	28233 ⁴	0.3%	2.3%
40	New North Road	13717	12602 ⁷	10920 ⁸	-2.8%	-25.6%
41	York Road	10937	10539	9281 ⁴	-2.0%	-17.8%
42	Hill Barton Road (South)	16911	17719	17661	0.4%	4.2%
43	Hill Barton Road (North)	16596	17136	17404 ⁸	0.5%	4.6%
44	Pinhoe Road	15227	15367	15613 ⁸	0.3%	2.5%
45	Pinhoe Road (Whipton)	19437	19722	17989	-0.8%	-8.0%
46	Hill Barton Road/Pinhoe Road (WB Off Slip)	3989	3802 ⁷	3739 ⁸	-0.7%	-6.7%
47	Sainsburys (Pinhoe) Exit	5511	5423	4904 ⁴	-1.4%	-12.4%
48	Prince of Wales Road	6464 ¹⁰	6545	6119	-0.6%	-5.6%
49	Exhibition Way (Exit)	2419	2551	2262 ⁴	-0.8%	-6.9%
50	Cumberland Way	13958	14370	18228 ⁸	2.6%	23.4%
51	Main Road (NEB)	6687	6835	6881 ⁸	0.3%	2.8%
52	Beacon Lane		11309	10531 ¹¹	-2.5%	-7.4%
53	Cowley Bridge Road	13777	13653 ³	11831	-1.6%	-16.4%

¹ No 2024 data available. 2021 used as 2024 value.

- ² No 2014 data available. 2015 used as 2014 value.
- ³ No 2019 data available. 2018 used as 2019 value.
- ⁴ No 2024 data available. 2023 used as 2024 value.
- ⁵ No 2019 data available. 2021 used as 2019 value.
- ⁶ No 2024 data available. 2022 used as 2024 value.
- ⁷ Partial 2019 data available. 2018 and 2019 used as 2019 value.
- ⁸ Partial 2024 data available. 2023 and 2024 used as 2024 value.
- ⁹ Partial 2019 data available. 2019 and 2020 used as 2019 value.
- ¹⁰ Partial 2014 data available. 2014 and 2015 used as 2014 value.
- ¹¹ No 2024 data available. 2022 and 2023 used as 2024 value.
- ¹² No 2014 data available. 2016 used as 2014 value.

Table 9.4 AADT for Devon County Council's ATC Sites (2014, 2019 and 2024). Site names in bold are part of the Major Road Network or Strategic Road Network.

- 9.4.2. Table 9.4 provides an overview of how traffic flows have changed across sites in Exeter according to Devon County Council's data collection points. It should be noted that weekends and holidays are excluded in this data.
- 9.4.3. The highest flows were recorded on the eastern edge of Exeter, most notably in proximity to J30 at Sandygate, where an AADT of over 32,000 was recorded in 2024. Bridge Road's counter is also one of the highest AADTs in the Exeter district, again with a 2024 count of over 32,000.
- 9.4.4. Traffic flows on roads within Exeter have generally been decreasing over the 10-year period. In most cases, this increase or decrease is by less than 2% per year. A notably larger increase can be found at both Alphington Cross on Alphington Road (8.8% over 2 years) and Cumberland Way (23.4% over 9 years). Conversely, a notable decrease can be observed at both Sidmouth Road and Honiton Road Park and Ride entries where a 205.8% decrease in traffic volumes and a 126.6% decrease in traffic volumes from 2014 to 2023 can be seen, respectively. This may be linked to changes in usage of Park and Ride services over recent years. It is important to note that small decreases in traffic volumes do not necessarily indicate improved road conditions; in some cases, they may reflect saturation, where roads are operating at or near capacity and cannot accommodate further growth without congestion.

9.5. Daily ATC Traffic profiles

- 9.5.1. Daily profiles have been produced and analysed for counters with 2024 data. This can be seen below in Figure 9.5. For simplicity, only corridors featured as high harm routes (as defined in section 10.5) are included. The counter with the greatest daily traffic flow per corridor is included.

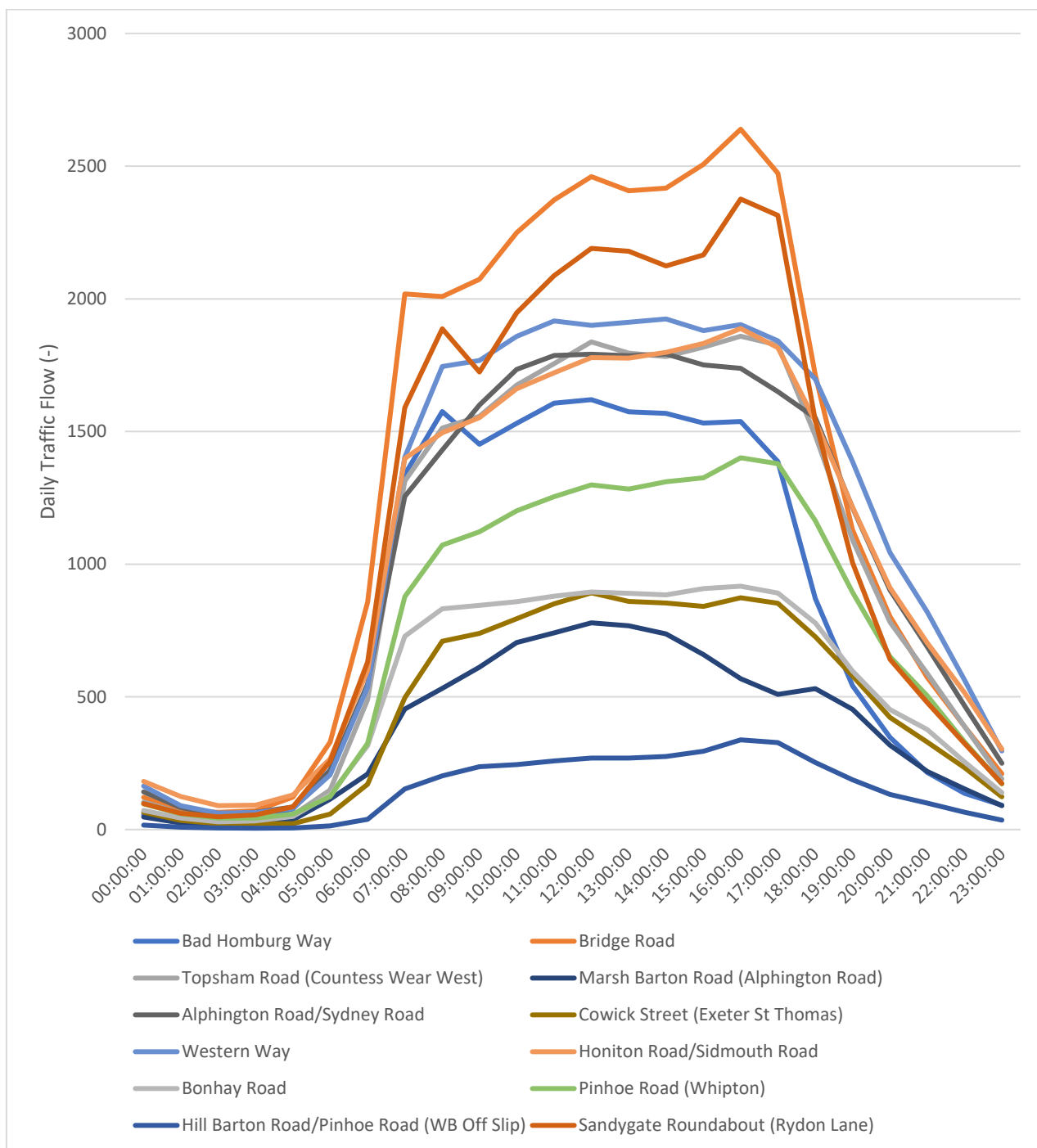


Figure 9.4: Daily ATC traffic profiles

- 9.5.2. Historically, daily traffic profiles have displayed an 'M' profile, with distinctive peaks in the morning peak (typically between 07:00 and 09:00) and again in the evening peak (between 16:00 and 18:00), and lower flows during the inter-peak (i.e. between 09:00 and 16:00). This reflected that a significant proportion of traffic was attributable to commuting to and from work, with many commuters arriving at their place of work around 09:00 and departing around 17:00.
- 9.5.3. However, as shown above, recent ATC data indicates a flatter profile with less well-defined peaks – in some cases, the inter-peak flow was greater than the AM and PM 'peak' flows. This is likely to reflect

changes in working patterns post-COVID, with more people able to work from home, reducing commuting trips and creating the potential for additional leisure/shopping trips during the inter-peak.

- 9.5.4. 'Saturation' of road capacity must be considered when assessing variations in traffic counts. Where there may be a slight decrease in traffic, for example around 2%, this does not necessarily mean more space has become available on the road as it may still be operating at capacity.

10. Collision & Casualty Data

10.1. Introduction

- 10.1.1. The following section summarises the key trends in road traffic collisions and casualties across Exeter, from 2020 to 2024. The casualty figures for Exeter are compared with those for Devon to provide context, as well as to offer comparison with the wider county in order to assess which challenges and successes may be specific to Exeter.
- 10.1.2. This includes the trends in casualty numbers, a comparison of casualty rates against other areas in Devon, seasonality, and mapping of routes in the area by collision performance.

10.2. 5 Year Casualty History

Total Casualties

- 10.2.1. The annual number of road traffic casualties in Devon and in Exeter between 2020 and 2024 is shown in Figure 10.1 and Figure 10.2 below.

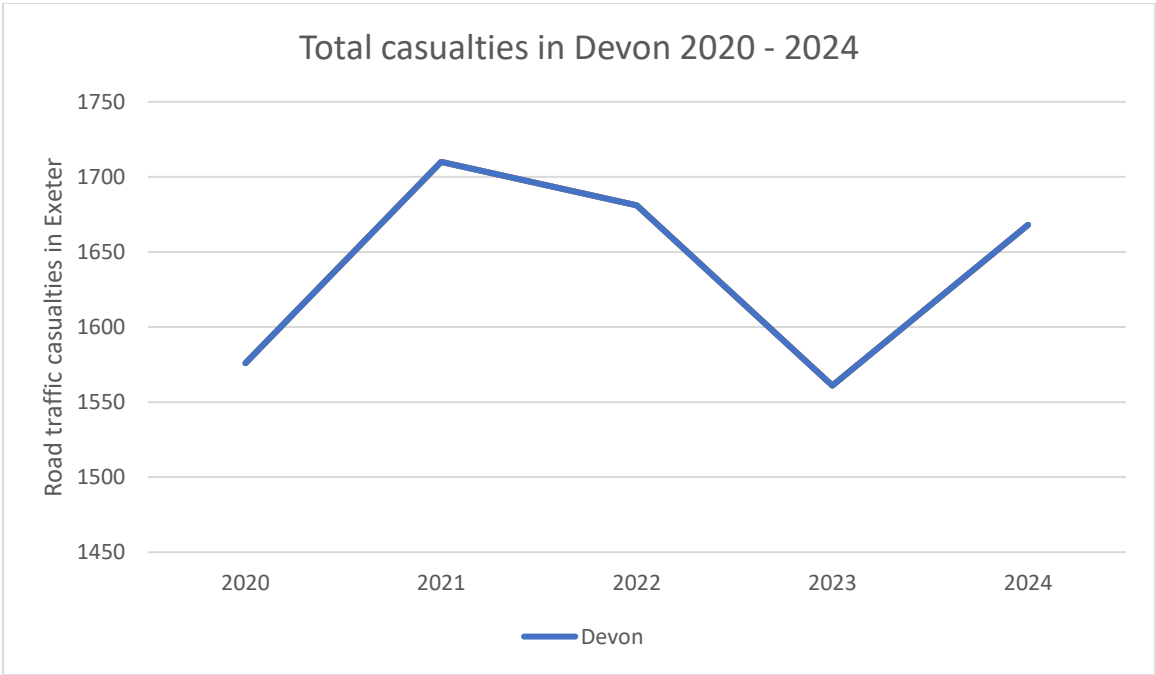


Figure 10.1 Annual number of road traffic casualties 2020 – 2024, Devon

- 10.2.2. In Devon, the number of road traffic casualties increased by 8.5% between 2020 and 2021, before decreasing by just 1.7% in 2022, and decreased further by 7.1% in 2023. Although between 2023 and 2024 total casualties across Devon increased by 6.7%, the number remained below the 2022 peak.

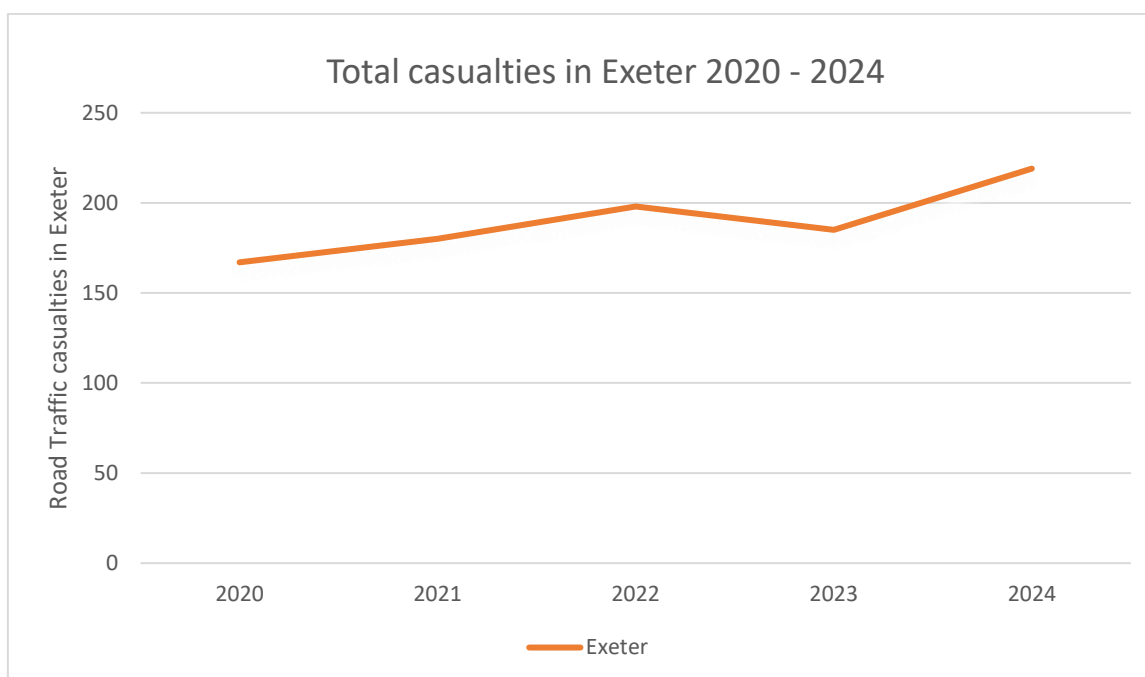


Figure 10.2 Annual number of Road Traffic casualties 2020 – 2024, Exeter

- 10.2.3. In 2020, there were 1,576 casualties in Devon and 167 in Exeter. In 2024, there were 1,668 road casualties recorded by the police across Devon, of which 219 were in Exeter. For Devon, this shows an increase of 5.8%, and for Exeter an increase of 31.1%. This is partially explained by the Covid-19 pandemic which saw an historic low number of casualties during 2020, see Figure 10.3 below.
- 10.2.4. Road traffic casualties in Exeter have increased from 170 to 219 between 2020 and 2024 (despite decreasing between 2022 and 2023), this follows a similar trend to national statistics with casualty numbers increasing, albeit below a 10-year and pre-covid (2017-2019) average.

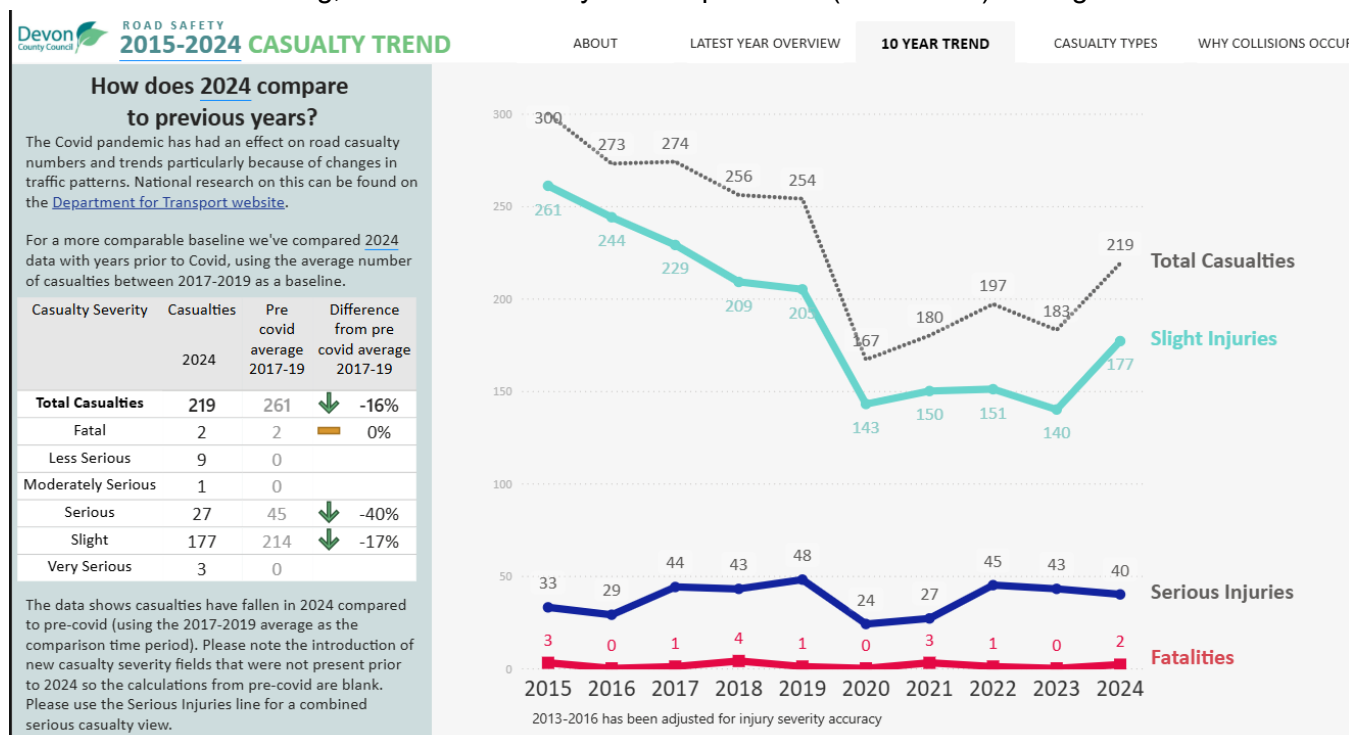


Figure 10.3 Exeter casualty trends between 2015 and 2024

Fatalities and Serious Injuries

10.2.5. The total number of Killed and Seriously Injured (KSI) casualties for Devon and Exeter are shown in Figure 10.4 and Figure 10.5.

10.2.6. In 2024, 320 KSIs were recorded across Devon, whilst 42 KSIs were recorded in Exeter.

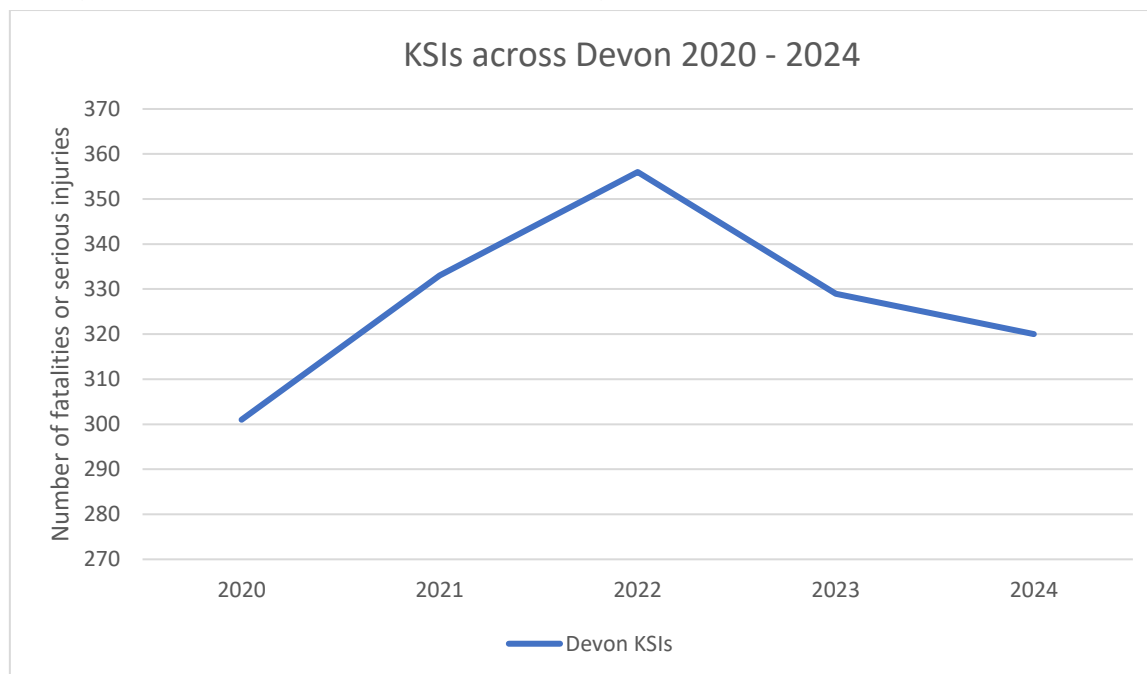


Figure 10.4 KSI trends for Devon 2020-2024

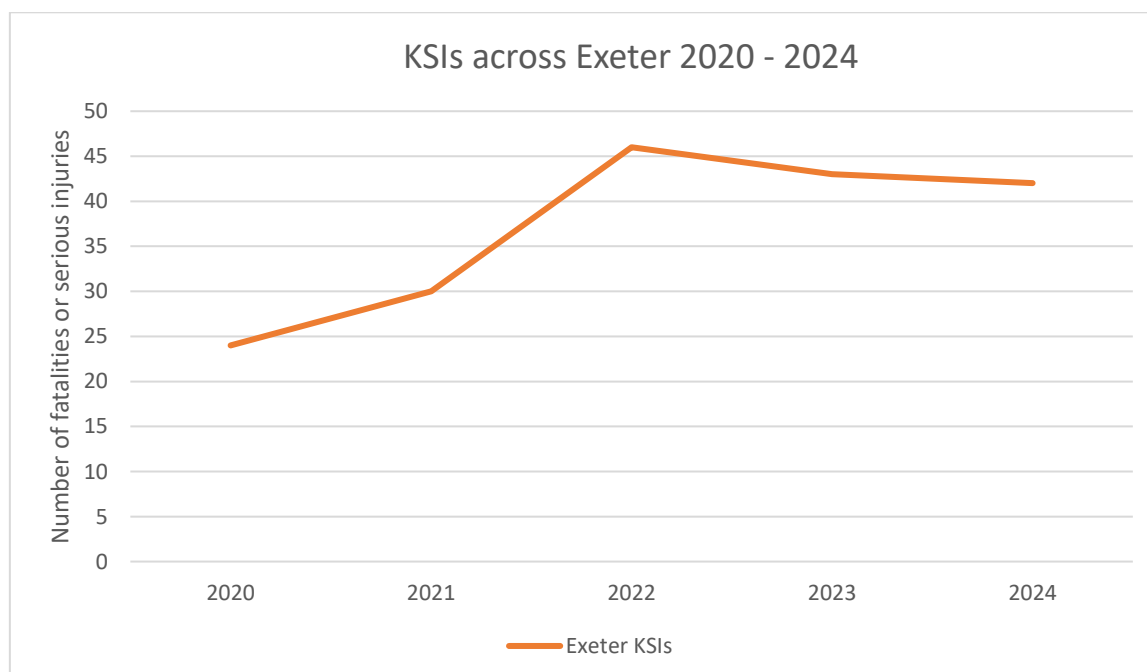


Figure 10.5 KSI trends for Exeter 2020-2024

10.2.6 The numbers of KSIs remained relatively stable throughout this time period for both Devon and Exeter. Both experienced an increase between 2020, 2021, and 2022, followed by a decrease in 2023 and 2024. This means that Devon and Exeter experienced a five year peak for KSI casualties in 2022, with 356 and 46, respectively.

10.3. Breakdown of Fatalities and Serious Injuries by Mode

10.3.1. Figure Figure 10 below shows the last five years of KSI (killed or seriously injured) casualties by mode of transport, for Exeter.

As can be seen in Figure Figure 10, across all modes of transport (excluding light goods vehicles and taxis) the 10-year trend in casualties has fallen. Between 2020 and 2024 pedestrian casualties and light goods vehicle casualties increased. Motorcycle and pedal cycle casualties increased until 2022 and 2023 respectively, before falling to a five year low in 2024.

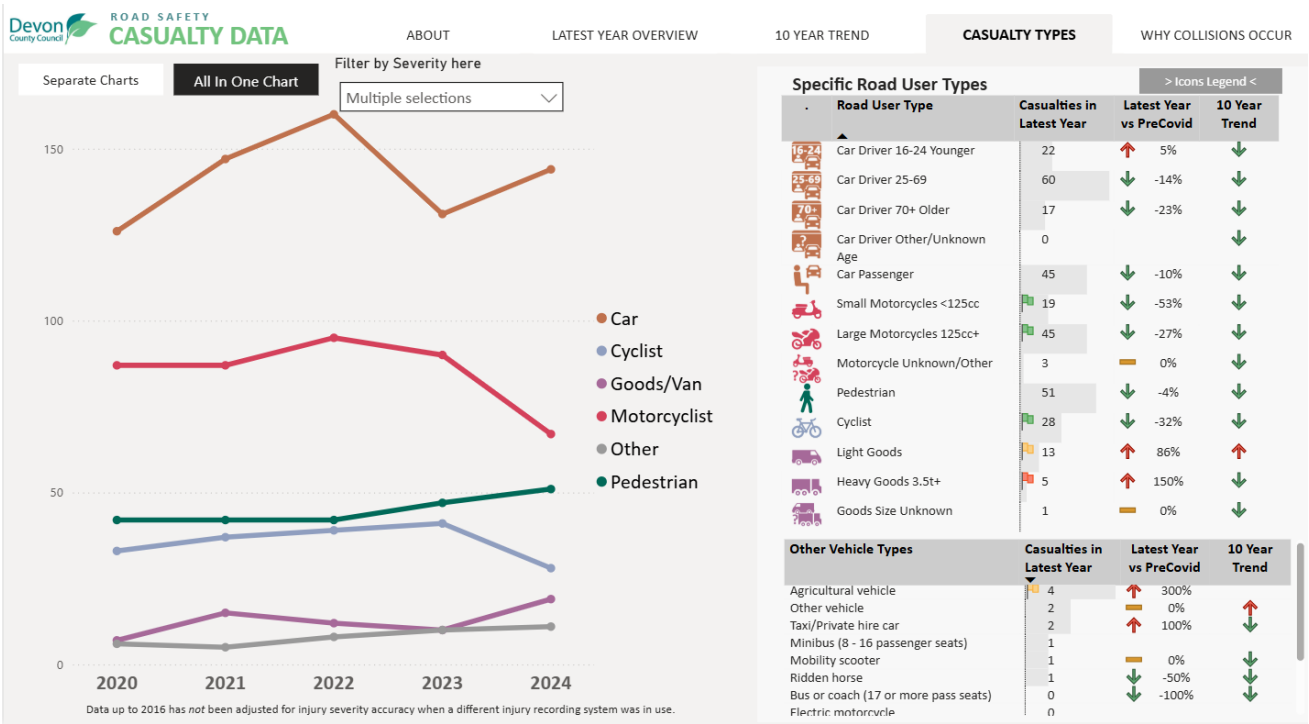


Figure 10.6 Annual Number of KSI casualties by mode, Exeter

10.3.2. Overall, the trends in five year KSI casualties are broadly similar to the National picture with relatively stable values. Exeter did see statistically significant reductions in cyclist, small motorcycle (<125cc), and large motorcycle (125cc+) casualties in 2024 compared with the 10-year average. Light goods vehicles (<3.5t) and heavy goods vehicles (3.5t+) saw borderline statistically significant and statistically significant increases in casualty numbers compared with the 10-year average.

10.4. Collision Seasonality

10.4.1. Weather patterns and hours of darkness can have a significant influence on traffic levels, sustainable mode share and vehicle performance. This in turn has a significant impact on the collision frequency.

10.4.2. To highlight the impact of seasonality, data for Exeter is provided below in Figure 10., which sets out the number of casualties and collisions incidents each month, on average from, 2020 to 2024.

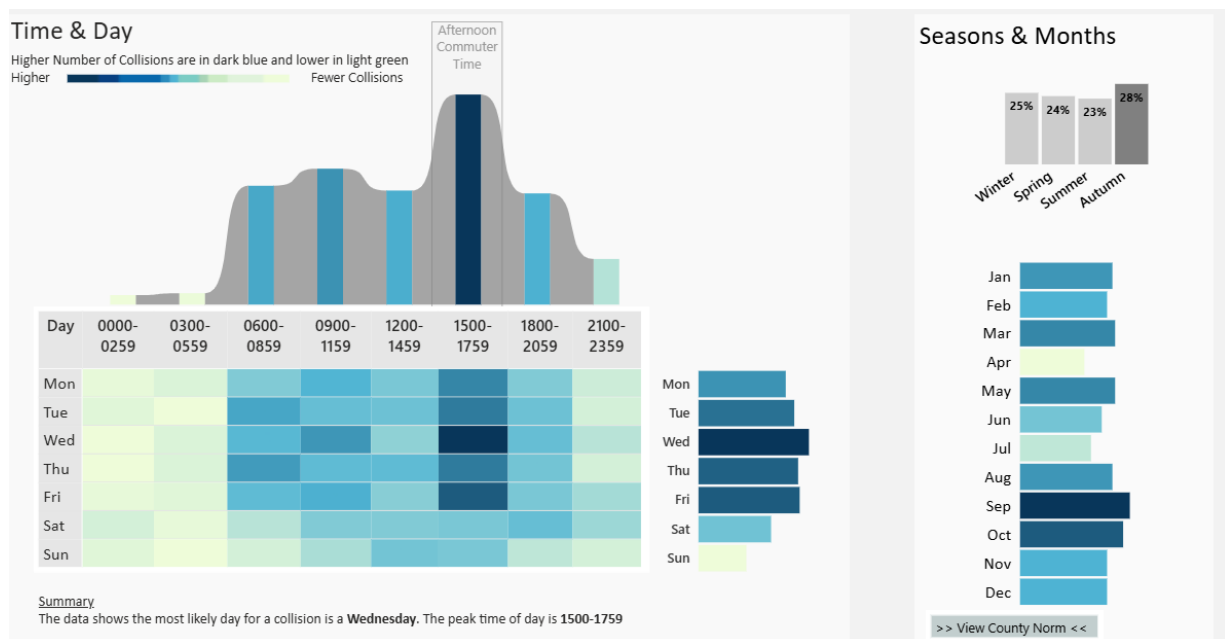


Figure 10.7 Monthly Total collisions and KSI collisions for Exeter (2020-2024)

- 10.4.3. For all collisions in Exeter between 2020 and 2024, the month with the lowest average number of collisions was April, and the highest average number of collisions was in September.
- 10.4.4. The average monthly collisions and casualties in Exeter between 2020 and 2024 presents a slight trend towards Autumn collisions, with a relatively similar number of collisions and casualties across the remaining seasons. Across Devon, figures are often higher in summer due to the higher number

of trips being made during these months. However, there is no clear pattern to suggest this was the case in Exeter between 2020 and 2024.

10.5. Route Analysis

- 10.5.1. Vision Zero South West Road Safety Partnership are working to reduce casualty numbers, with the ambition to cut road deaths and serious injuries to zero by 2040. As part of this, Devon County Council have identified high harm routes based on A & B roads across Devon & Cornwall. This analysis focuses on the Exeter area to provide an idea for the routes under investigation in the Exeter area.

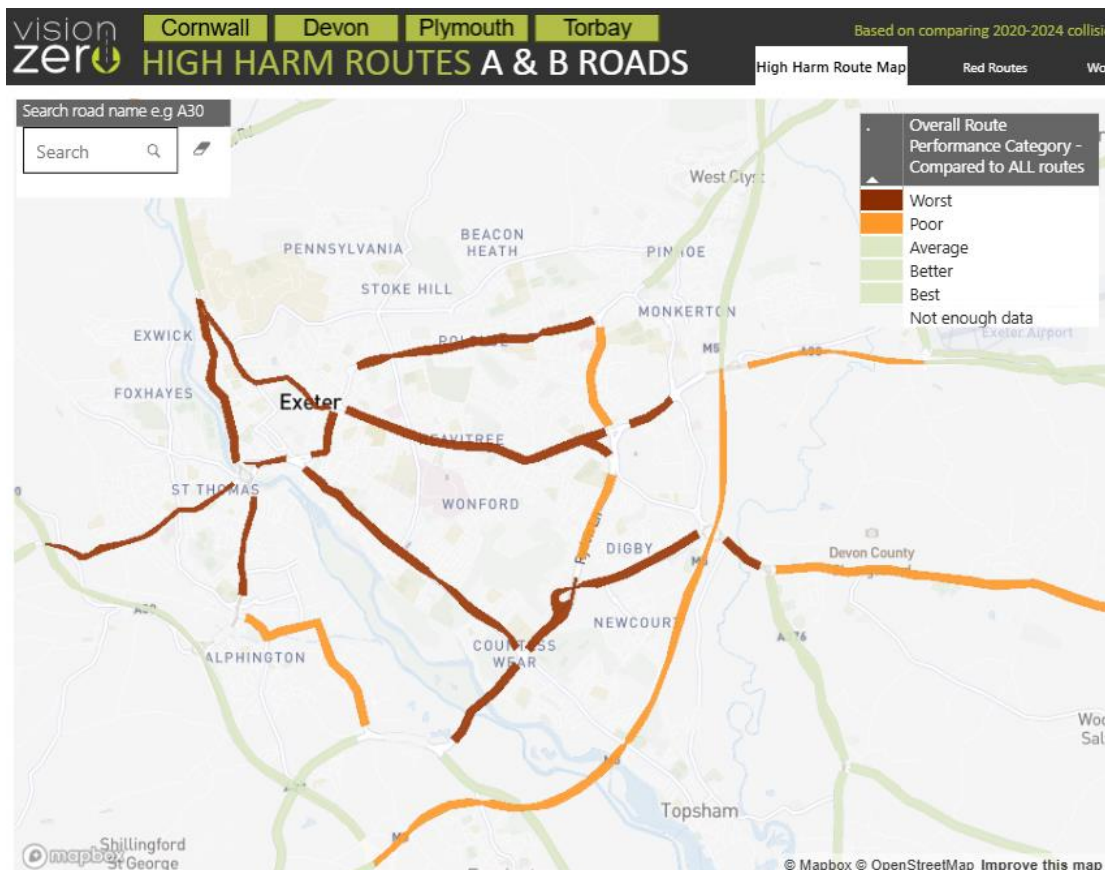


Figure 10.8 Map of Exeter 'high harm routes'

More information on these routes can be found here: [Collision and Casualty Data - Roads and transport](#)

- 10.5.2. The analysis that is undertaken on high harm routes includes identifying particular problems associated with each road, by identifying trends that are exclusive to particular routes interventions are tailored to resolve collisions.

10.6 Cluster Analysis

- 10.6.1 Cluster Analysis is conducted annually by Devon County Council Road Safety team to identify clusters of collisions, five collisions within 50m radius over the last five years.

These analyses help identify problematic junctions, roundabouts and gyratory systems which can then be targeted for intervention.

Previous cluster site analysis identified several roundabouts across Exeter where cyclists were involved in collisions, interventions were implemented which has seen these sites no longer meet cluster site criteria.

11. Air Quality

11.1. Background

- 11.1.1. Air pollution has a negative impact on the health of those living and working in vicinity. Road transport is a major source of pollutants and the worst affected areas are often at roadside locations where there are residential dwellings.
- 11.1.2. The contribution to air pollution varies considerably by vehicle type. For example, data in the Exeter Air Quality Management Plan sets out that whilst cars typically account for 80% of the traffic volumes, they contribute only 35-40% of the nitrogen dioxide (NO₂).
- 11.1.3. Under the Environment Act 1995 all Local Authorities are required to assess the air quality against a set of national targets for seven key pollutants. These include, carbon monoxide, benzene, 1,3-butadiene, lead, nitrogen dioxide, sulphur dioxide and fine particles (PM10).
- 11.1.4. The monitoring of air quality is the responsibility of the district (Exeter City Council), however Devon County Council work closely with Exeter City Council to address key hotspots where air quality does not meet requirements.
- 11.1.5. Air quality assessments need to be carried out every three years and the areas where objectives are not met, must be declared as Air Quality Management Areas (AQMA). Typically, the recorded exceedances are for Nitrogen Dioxide based on the following criteria;
 - Annual mean NO₂ Concentration of 40 µg/m³.
 - Hourly mean NO₂ Concentration of 200 µg/m³ not exceeded more than 18 times a year.
- 11.1.6. The current extent of the Exeter AQMA and the location of East Wonford Hill (the only location where there has been an annual exceedance in relation to NO₂ in the last three years) is shown in Figure 11.1.

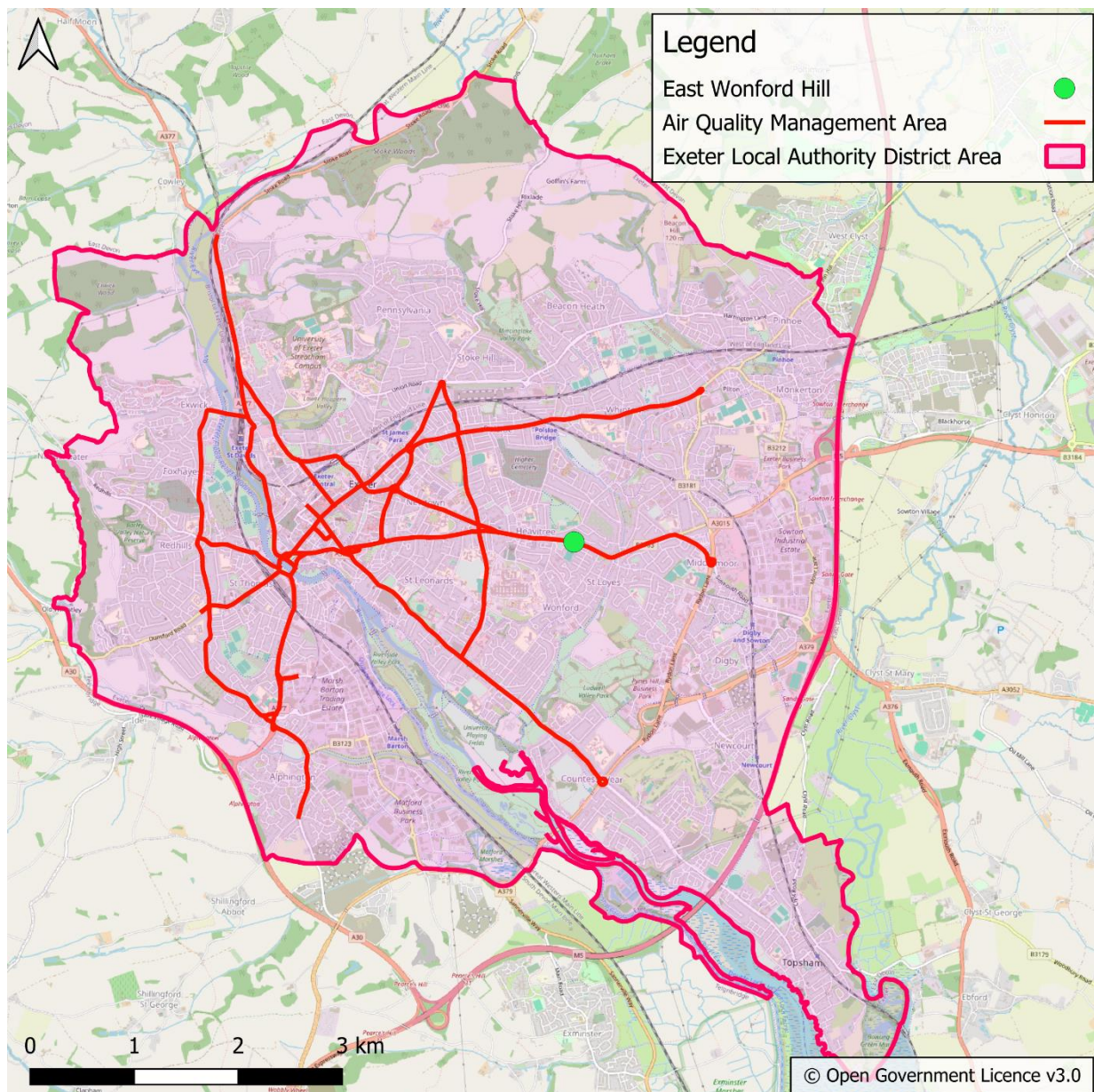


Figure 11.1 Map of Exeter's Air Quality Management Area

11.2. NO₂ Concentration

- 11.2.1. Exeter City Council regularly monitor air quality, using diffusion tubes at a range of sites across the district. Table 11.1 **Error! Reference source not found.** below sets out the annual mean concentrations of NO₂ in key roads across the district, in each case using the monitoring site with the highest recorded concentration in 2024.

Location	NO ₂ Annual Mean Concentration (µg/m ³)					
	2019	2020	2021	2022	2023	2024
Queen Street	23.8	16.2	19.0	16.6	17.4	16.1
North Street	35.7	22.6	27.9	24.0	23.9	28.8
Alphington Street	42.0	28.5	25.7	33.1	34.3	31.5
Alphington Cross	30.2	20.4	25.6	22.5	23.8	22.9
Cowick Street (Cowick Lane)	38.7	26.8	31.6	30.1	31.2	29.9
Okehampton Street	24.3	17.3	20.6	18.7	19.0	18.6
Station Road	25.4	17.7	21.2	20.3	20.7	19.6
Red Cow Village	36.0	26.5	32.1	29.7	31.7	27.1
Cowley Bridge Road	32.5	22.9	27.5	26.5	25.9	24.2
Union Road	26.4	16.7	21.0	19.3	18.7	17.7
East Wonford Hill	53.5	38.2	42.2	40.4	40.5	38.1
Topsham Road (Tollards Road)	36.4	25.0	30.0	27.9	28.8	27.5
Pinhoe Station	15.1	10.6	13.4	12.5	13.5	12.1
New Bridge Street		19.5	24.0	22.5	22.7	21.8
Bonhay Road Bridge				26.9	27.1	26.6

Table 11.1 Annual mean NO₂ concentrations at sites in Exeter

- 11.2.2. Exeter has a number of air monitoring sites which are highlighted in Table 11.1. Exceedances of the annual mean objective are shown in bold text, with a grey background.
- 11.2.3. Prior to 2020, the annual mean objective was regularly exceeded at a number of places in the city. A significant fall in concentrations was seen in 2020 as a result of a reduction in traffic flows during COVID-19. This rebounded in 2021 but not back to pre-pandemic levels. There was then a further fall in concentrations seen at most sites in 2022, with concentrations roughly stable since then.
- 11.2.4. The only site where levels over the annual average objective have been measured in any of the last three years is East Wonford Hill, although results from this location exhibit a consistent downward trend (and were below the threshold for an exceedance in 2024). Exeter City Council therefore proposes to reduce the AQMA to just the area which was above the objective level in 2023, at East Wonford Hill.

12. Planned Investment

12.1.1. Planned investment in Exeter's transport network is wide ranging, covering walking improvements, wheeling and cycling infrastructure improvements, bus improvements and improvements to rail stations. Table 12.1 below outlines a selection of committed projects, drawn from key policy documents⁹, including the Local Transport Plan 4 (LTP), Local Cycling and Walking Infrastructure Plans (LCWIPs), Peninsula Transport Strategic Implementation Plan (PT SIP) and the Bus Service Improvement Plan (BSIP). Whilst a set amount of funding is allocated for capital infrastructure schemes (typically detailed in the annual Cabinet report of the Transport Capital Programme, match funding for schemes comes from a range of external sources including, for example, the Active Travel Fund, Section 106 (from developer contributions) and BSIP funds. Many of these funding opportunities are competitive, bid based national funding sources, with defined criteria for eligible spend and defined spend timescales.

12.1.2. The investment priorities outlined in the table below are supported by the data presented in this report, which contributes to a wider evidence base used to inform transport planning in Exeter. By aligning planned infrastructure with observed travel patterns, safety concerns, and modal trends, these proposals aim to deliver improvements that respond to the needs of residents, support sustainable growth, and help achieve the city's long-term transport objectives.

Investment	Location	Document	Potential benefits
Boniface Trail walking and cycling route	Crediton / Exeter	Countywide LCWIP	Safer and more direct journeys for pedestrians and cyclists. Active travel connections between Crediton and Exeter for both commuting and leisure. Access to natural environment between the settlements.
Priority cycle network improvements (E3 – City Centre to Cranbrook, E4 – University to Science Park, E9 – Topsham to City Centre, E12 – Beacon Heath to Marsh Barton)	Exeter	Exeter LCWIP	Safer and more direct journeys for pedestrians and cyclists. Connect residential areas, including Cranbrook, Newcourt and Beacon Heath, with key employment sites. Improved access to schools. Remove car trips from the local road network, improving air quality and reducing congestion.
Other proposed cycle network improvements (E1, E5, E6, E7, E8, E10, E13, E14, E15, E16, E17, E18, E19, E20, E21, E22)	Exeter	Exeter LCWIP	Safer and more direct journeys for pedestrians and cyclists. Connect various residential areas with key employment sites. Improved access to schools. Remove car trips from the local road network, improving air quality and reducing congestion.
Proposed primary walking network improvements (W1-W5)	City Centre / Exeter Quay / St Thomas / St James	Exeter LCWIP	Improve the safety, ease, and attractiveness of walking as a mode. Improve connections to the city centre from residential areas of St Thomas and St James. Improved and less car dominated arrival experience at St Davids station, and connections with City Centre.

⁹ [Transport planning - Roads and transport \(devon.gov.uk\)](https://devon.gov.uk/transport-planning-roads-and-transport)

Investment	Location	Document	Potential benefits
Clyst Valley Trail	Clyst St Mary / Sowton / West Clyst	Clyst Valley & New Communities LCWIP	Link 12,000 new homes and 10,000 new jobs in Exeter and East Devon. Leisure and commuter route between towns along the river Clyst, Exeter, Cranbrook, and surrounding employment areas.
New ped/cycle crossing of M5	Sowton	Clyst Valley & New Communities LCWIP	New bridge to connect to improved routes through Sowton industrial estate and to Digby & Sowton rail station.
Bus priority measures and bus stop infrastructure	Exeter / countywide	BSIP, PT SIP	Measures to enhance bus priority along Northern, Eastern, Western and Central corridors across the city, and at M5 J29, improving efficiency and resilience of bus travel. Standardisation of flags and information points to assist passengers, with shelter upgrades and real time information displays.
City Centre public realm enhancements	City Centre	LTP	Improved public realm and active travel facilities in various city centre locations.
Quiet Lanes	Exeter	LTP	Creation of quiet lanes to support active travel into Exeter from surrounding settlements.
Devon Metro rail infrastructure enhancements	Exeter / countywide	LTP	New railway stations at Cullompton and Okehampton Interchange. At least half-hourly services on lines into Exeter.
Electric vehicle charging facilities	Exeter / countywide	LTP, Electric Vehicle Charging Strategy	Delivery of on-street electric vehicle charging facilities. Electricity generation and EV charging at Park and Change sites. Community Charge Hub at Matford Park & Ride. Continued expansion of electric bus fleets.
A379 Bridge Road Major Road Network scheme (canal bridge renewals)	Matford / Countess Wear	Department for Transport Major Road Network programme	Renewals of canal bridges to improve reliability of key road corridor and M5 diversionary route linking Exeter to South Devon. Improvements to walking and cycling routes along and across Bridge Road.
Beacon Lane	Beacon Heath	Pinhoe access strategy	Route enhancement and improved pedestrian/cycle crossing at Pinn Brook.
Clyst Road/Newcourt Road active travel and public transport enhancements	Clyst St Mary / Newcourt / Topsham	Clyst Road and Newcourt Road Access Strategy	Continuous north-south cycle route along or parallel to Clyst Road. Enhancement of Clyst Road or parallel roads to facilitate two-way bus route. Consider new pedestrian/cycle crossings of railway and M5.
Exeter St Davids – Teignmouth signalling improvements and resilience works	Exeter	PT SIP	Increase capacity and resilience of mainline railway linking Exeter to South Devon and Cornwall.
Strategic rail freight interchange at Exeter Riverside Yard	St Davids	PT SIP	Increase ability for rail to accommodate freight traffic and remove heavy goods vehicles from local and strategic road networks.

Table 12.1 Planned investment

13. Summary

Travel to Work

- 13.1.1. The travel to work data utilised in this report is made up of census data grouped into MSOA-based areas. Exeter has a large Travel to Work (TTW) area and a highly positive net commuting flow, with 37,168 commuting into Exeter and 10,952 commuting out. The majority of out-commuters travel to East Devon. According to the 2011 census, 48% of Exeter's working population both live and work within the city.
- 13.1.2. Across Exeter, 46% of internal commuters travel by car, compared to 84% of in-commuters and 78% of out-commuters. Active travel (walking and cycling) accounts for 39% of internal commuting trips, significantly higher than regional averages. Exeter's compact urban form and proximity of residential areas to employment centres contribute to this trend.
- 13.1.3. The proportion of Exeter workers who travel to work by car or van reduced from 50% in 2011 to 41% in 2021. This may be attributed to the increase in residents working from home, as the proportion of residents who travelled to work by car when working from home was excluded, actually increased slightly during this period.
- 13.1.4. The proportion of sustainable travel commuting trips decreased between 2011 and 2021. Whilst the number of travel to work trips by cycle reduced slightly from 6% to 5%, the proportion of commuting trips by foot reduced from 22% to 16%. Public transport usage also declined, with bus usage falling from 9% to 5% and train usage from 2% to 1%. These figures are affected by the pandemic and the rise in remote working.

Walking

- 13.1.5. Walking is the second most popular mode of travel to work across Exeter, used by 16% of residents who were employed at the time of the 2021 census. This was higher than the Devon average (10%). On-foot trips decreased between 2011 and 2021, partly attributable to the rise in working from home.
- 13.1.6. While the majority of Exeter has relatively high rates of commuting by foot, the highest rates are found in Central Exeter, St James's Park & Hoopern, and St Leonard's (all above 24%). These areas are close to the city centre and key employment sites. Lower rates are observed in more peripheral areas such as Pinhoe & Whipton North and Countess Wear & Topsham.
- 13.1.7. This may not capture journeys which are primarily another mode but also include walking as an integral part; the 2014 NTS note on multi-stage trips sets out that 27% of all walking trips are part of a trip by another mode.

Cycle

- 13.1.8. Overall, the TTW cycle mode split across Exeter was 5% at the 2021 census, down slightly from 6% in 2011. For individual MSOA areas, this ranged between 4% and 6%, with the highest mode split being in Countess Wear & Topsham.

- 13.1.9. Cycle to work levels remained relatively stable between 2011 and 2021 across most areas. Although automatic cycle counter data shows varied trends. Some sites, such as Clapperbrook Lane and Exminster Canal Causeway, recorded notable increases - likely reflecting growth in leisure cycling, particularly in areas with scenic or off-road routes. However, other sites showed declines, especially after 2019. This reduction may be linked to changes in commuting patterns due to increased home working following the COVID-19 pandemic, which reduced the need for daily travel.
- 13.1.10. Cycling levels are shown to be seasonal, with a peak in August and the lowest number of trips in January and December. Daily profiles show commuter peaks around 8am and 5pm, though some sites show midday peaks indicative of leisure use.

Bus

- 13.1.11. Between 2011 and 2021, the use of bus services for commuting in Exeter declined, with the TTW modal share decreasing from 9% to 5%.
- 13.1.12. The areas with the highest bus mode share are Mincinglake & Beacon Heath (7.4%) and Wonford & St Loye's (6.7%). These areas may have higher bus usage due to topography, accessibility, and demographic factors. Exeter has a comprehensive bus network with frequent services to surrounding towns and key employment sites.

Rail

- 13.1.13. Exeter is served by multiple rail lines, including the Avocet Line and the West of England Line, and contains three of the five busiest stations in Devon. Between 2013 and 2023, rail usage across Exeter stations increased by 102%, compared to a national increase of just 2%.
- 13.1.14. The areas with the highest TTW mode split by train are Central Exeter and Countess Wear & Topsham. Despite the presence of major stations, train commuting remains low at 1%, though station patronage has grown significantly, particularly at Pinhoe and St James's Park.

Vehicular

- 13.1.15. According to the 2021 Census, 41% of Exeter residents who were in employment used a car/van to travel to work, down from 50% in 2011. Car ownership has increased slightly, with 74.9% of households having access to a car/van in 2021, compared to 73.6% in 2011.
- 13.1.16. There are variations in car ownership across the district; in Central Exeter only 46% of households had access to a car in 2021, while in Middlemoor & Sowton this was 88%. Traffic flows are highest on the M5 and key radial routes such as Bridge Road and Alington Road.
- 13.1.17. Across the DCC-managed road network, traffic flows have remained relatively stable, though some corridors show signs of saturation. Daily traffic profiles have flattened post-pandemic, reflecting changes in commuting patterns and increased inter-peak travel.

Road Safety

- 13.1.18. In 2024, there were 1,666 road casualties recorded by the police across Devon, of which 218 were in Exeter. This compares to 1,576 and 170 in Devon and Exeter, respectively, in 2020. The number of KSI (killed or seriously injured) casualties in Exeter remained relatively stable, peaking in 2022.
- 13.1.19. Multi-factor route analysis has been undertaken to compare the collision performance of the main roads in the Exeter area. The worst performing routes are mostly along major arterial corridors including the A377, A379, A3015, and B3212.

Air Quality

- 13.1.20. Air quality in Exeter has improved in recent years, with a reduction in the number of exceedances reported, such that there is only one site where nitrogen dioxide levels over the annual average objective have been measured in any of the last three years. Results from this location (East Wonford Hill) exhibit a consistent downward trend (and were below the threshold for an exceedance in 2024).