East Devon Transport Strategy

Transport Empirical Data Report

March 2025

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CONTENTS

1. INTRODUCTION 5

1.1. Purpose of Report 5
1.2. Structure of the Report 5

2. BASELINE TRANSPORT CONTEXT 6

3. DEMOGRAPHIC DATA 10

3.1. Age 10
3.2. Disability 11
3.3. Ethnic Group 12
3.4. Sex 12

4. TRAVEL TO WORK DATA 14

4.1. Travel to Work Census Areas 14
4.2. Travel to Work draw across East Devon 16
4.3. Travel to Work by Distance 21
4.4. Travel to Work by Mode 21
4.5. Travel to Work by Mode – Local and National Comparison 24

5. WALKING 27

5.1. TTW Numbers 27
5.2. Walking as part of a Multi-Stage Trip 29

6. CYCLING 30

6.1. Introduction 30
6.2. Modal Splits 31
6.3. Usage 33
6.4. Daily profile 35
6.5. Seasonality 36

7. PUBLIC TRANSPORT – BUS 37

7.1. Introduction 37
7.2. Bus Patronage 38
7.3. TTW Data 40

8. PUBLIC TRANSPORT – RAIL 42

8.1. Greater Exeter Rail Network 42
8.2. Rail Patronage 43
8.3. Travel to Work Data 45
8.4. Rail Capacity 46

9. VEHICULAR TRAFFIC 47

9.1. Introduction 47
9.2. Car Ownership 47
9.3. Strategic Road Network Data 49
9.4. Local Highway Network Data 52
9.5. Daily ATC Traffic profiles 54

10. COLLISION DATA 56

10.1. Introduction 56
10.2. 5 Year Accident History 56
10.3. Breakdown of Fatalities and Serious Injuries by Mode 57
10.4. Accident Seasonality 59

10.5. Route Analysis 60
11. AIR QUALITY 62
11.1. Background 62
11.2. NO2 Concentration 62
12. PLANNED INVESTMENT 64
13. SUMMARY 66

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 East Devon Local Plan Transport Strategy.

1.1.2. This report provides an overview of the empirical travel data for the East Devon 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 East Devon Local 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: Collison Data
- Section 11: Air Quality
- Section 12: Planned Investment
- Section 13: Summary

2. Baseline Transport Context

2.1.1. East Devon covers an area of approximately 814km^2 with a combined population in 2021 of 150,828 . Figure 2.1 illustrates the district's key settlements, road and rail networks.

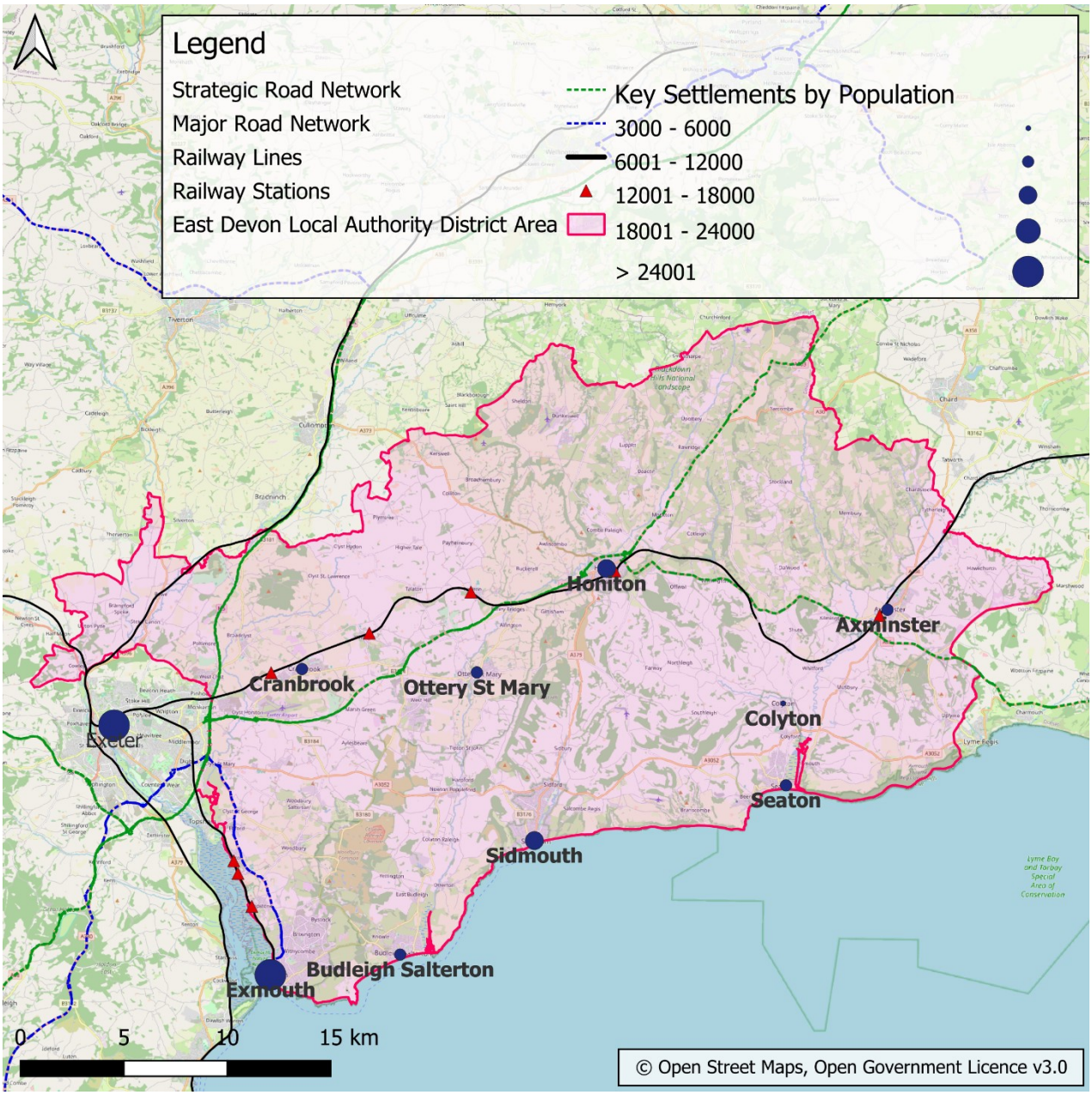


Figure 2.1 Key settlements, road, and rail networks in East Devon

2.1.2. Key settlements found in East Devon include the towns of Exmouth, Honiton and Cranbrook. Exmouth is positioned at the southern end of the eastern side of the Exe Estuary, and plays an important role as the principal centre and a key location for employment, culture and community facilities. Honiton is a key settlement strategically-positioned at the intersection of the A303 and A35 on the Strategic Road Network (SRN). Cranbrook is a new key settlement positioned on the outskirts of

Exeter, with a new rail link provided and key strategic positioning at the intersection of the M5 and A30 on the SRN.

2.1.3. The whole of East Devon has a working population of 68,900 and 66,100 jobs[1]. Of these 52,500 were people in employment and 13,600 were people who were self-employed. Key employment sectors include retail and wholesale 9,000 jobs (18% of all employees), health and social work 6,000 (12%) and accommodation and hospitality 6,000 (12%). Construction, Manufacturing, Education and Scientific research are also significant employment sectors in East Devon.

2.1.4. A growth area has been defined to include industrial estates located in Exmouth and due east of the M5 on the outskirts of Exeter. Defining a growth area allows for identification of key employment sites within the district without detailing every single one. The defined growth area contains a number of key employment sites ranging from cutting edge scientific, digital and knowledge-based services provided at Exeter Science Park to a significant amount of B2 and B8 focused industrial and warehousing at Hill Barton Industrial Estate. Exmouth has several key employment areas, including Liverton Business Park. The total number of employees at each industrial estate within the growth area can be seen in Table 2.1[2].

2.1.5. Major employers in Exmouth include Haven, Exmouth Community College, Tesco, the NHS, and a social care company that provides over 1,400 jobs. Additionally, LiveWest Homes, Devon and Somerset Fire and Rescue, and Jurassic Fibre contribute a further 1,100 jobs in East Devon.

Area	Industrial Estate	Number of employees at VAT registered businesses
East of M5	Skypark	1,917
	Hill Barton	1,546
	Greendale	1,435
	Exeter Science Park	445
Exmouth	Liverton	615
Total		**5,958**

Table 2.1 Employees per industrial estate in East Devon

2.1.6. There are eight settlements within the district with populations of over 5,000[3], which are shown in Figure 2.1, these are:

- **Exmouth** (population 35,493). Coastal town - the largest town in East Devon. Primary vehicle access from A376 and B3178
- **Sidmouth** (14,383). Coastal town off the A3052 – gateway to the Jurassic Coast World Heritage Site.

[1] Source: ONS Annual Population Survey, October 2023 to September 2024
[2] Source: Inter-Departmental Business Register (IDBR), 2023
[3] Source: Census 2021, defined by parish

- **Honiton** (11,329). Market town situated along the river Otter, with key SRN links (A30 bypassing to the north, A35).
- **Axminster** (8,186). Market town on the river Axe with primary vehicle access from the A358 and A35.
- **Ottery St. Mary** (7,904). Town on the River Otter with vehicle access from the A30 via the B3174 and B3177.
- **Seaton** (7,684). Coastal town forming part of the Jurassic Coast World Heritage Site. Primary vehicle access from the A3052.
- **Cranbrook** (6,581). New town situated approximately 6 miles northeast of Exeter city centre, between the B3174 and the West of England Main Line railway
- **Budleigh Salterton** (5,259). Coastal town with primary vehicle access via the B3178.

2.1.7. East Devon has a strategic transport network, depicted in Figure 2.1. The M5 in the west of the district provides links northward through neighbouring district Mid Devon to Somerset, Bristol and beyond and south to Teignbridge where it becomes the A38 'Devon Expressway'.. The other key parts of the Strategic Road Network include the central A30/A303 corridor providing mostly dual-carriageway connectivity west to Exeter and east to neighbouring Dorset and onto London as well as the A35 through Axminster along the south coast. The A376 serves Exmouth as part of the Major Road Network. The West of England railway line provides connectivity to East Devon from Exeter in the west; serving key centres of Cranbrook, Honiton and Axminster and further eastern connections to Salisbury and ultimately London Waterloo. Exmouth and other smaller destinations along the Exe Estuary are served by the Avocet branch line from Exeter, with most services continuing south from Exeter to Paignton.

2.1.8. The main settlements in East Devon are served by a comprehensive bus network with hourly (or greater) connections internally between local centres and externally to larger urban areas outside of the district, such as Exeter and Weymouth. Most of the bus routes extend radially from Exeter to the key population centres such as Cranbrook, Ottery St Mary, Honiton, Sidmouth, Exmouth and Axminster. The district's more rural areas, such as villages located within the Blackdown Hills National Landscape, have a much lower frequency of service.

2.1.9. Some areas of the road network across the district experience congestion, particularly key routes around M5 Junction 30 Roundabout and Clyst St Mary where the Strategic Road Network (M5) intersects with parts of the Major Road Network (A376) and another major road within the district (A3052).

2.1.10. Levels of active travel amongst commuters are highest in the district's larger towns (Exmouth, Sidmouth, Honiton) as employment centres are within walking and cycling distance of residential areas.

2.1.11. Analysis of commuter trends demonstrates that just under 60% of working East Devon residents are employed within the district, with 40% leaving for work elsewhere, with a high proportion to Exeter. The resultant overall workplace population is predominantly made up of East Devon residents (67%) although the district does draw in 1/3 of its workers from other areas. Overall, there is a reduction

in the working population each day as more people leave East Devon for work than commute in. This is explored in further detail in Section 4.1 below.

2.1.12. The evidence within this report, including current levels of usage and trends of the existing transport infrastructure, will provide a basis of planning for future transport challenges.

3. Demographic Data

3.1. Age

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. With the exception of Cranbrook, all local large parishes demonstrate an average elderly population that exceeds the countywide average. For example, the greatest proportion of 65 year old and over residents can be found in Budleigh Salterton (45%); having close to twice the proportion of elderly people across Devon (26%) and over twice the regional average (22%). Seaton (44%), Sidmouth (42%) and Colyton (39%) all share similarly high proportions of elderly people. As such, the district proportion of elderly people is the greatest amongst the districts highlighted in Table 3.1; almost double that of Exeter (17%).

3.1.2. As a result, all parishes (except Cranbrook) equally have an average proportion of the working-age population lower than the countywide average (58%)., East Devon has the lowest proportion of working age people amongst neighbouring districts. It is the same parishes with the high proportion of elderly people that have the lowest proportion of working-age people amongst those chosen (Budleigh Salterton (44%), Seaton (46%), Sidmouth (46%) and Colyton (49%)).

3.1.3. The countywide percentage of 16% of the population being 15 years and under matches the district's percentage. It is those same parishes (Budleigh Salterton

		Age		
Geography	**Population**	**15 years and under**	**16-64 years**	**65 years and over**
Axminster	8,186	16%	55%	29%
Budleigh Salterton	5,259	11%	44%	45%
Colyton	3,296	13%	49%	39%
Cranbrook	6,581	30%	66%	4%
Exmouth	35,493	15%	56%	29%
Honiton	11,329	15%	56%	29%
Ottery St. Mary	7,904	18%	56%	26%
Seaton	7,684	10%	46%	44%
Sidmouth	14,383	12%	46%	42%
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 data for broad age categories

(11%), Seaton (10%), Sidmouth (12%) and Colyton (13%)) possessing a lower-than-average proportion of young people.

3.1.4. The exception to all of these trends is Cranbrook. As a relatively new town most new residents are young families and urban professionals with only 4% of the population being 65 years old and over. The National Travel Survey, which provides annual, national travel-related statistics, highlights that both males and females between the ages of 30 and 49 make more trips, especially by car[4]. Given both Cranbrook's status as a town in current development and therefore lacking many essential destinations as well as Cranbrook's demographics, it may be inferred that more trips are made in this area compared to others.

3.2. Disability

3.2.1. Table 3.2 shows statistics related to the percentages of disabled people at varying geographies. Generally, with the exception of Cranbrook, larger settlements across East Devon equal or marginally exceed countywide or regional proportions of disabled people. Conversely, Cranbrook has the greatest proportion of those who have no long-term physical or mental health conditions (80%). This is 8 percentage points greater than both the district and countywide averages (72%).

		Disabled		Not disabled	
Geography	**Population**	**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**
Axminster	8,186	8%	13%	8%	71%
Budleigh Salterton	5,259	9%	14%	9%	68%
Colyton	3,296	9%	12%	8%	71%
Cranbrook	6,581	4%	9%	7%	80%
Exmouth	35,493	9%	13%	8%	71%
Honiton	11,329	8%	13%	8%	70%
Ottery St. Mary	7,904	7%	11%	9%	73%
Seaton	7,684	11%	14%	8%	67%
Sidmouth	14,383	8%	14%	9%	70%
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

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

3.3. Ethnic Group

3.3.1. Table 3.3 highlights the ethnicity of residents across East Devon and adjacent districts, as well as across the county and region. With the exception of Cranbrook, all parishes in the district have a marginally greater “White” population than the countywide average.

3.3.2. Exeter, adjacent to East Devon, is significantly more ethnically diverse, with, as an example, approximately 4.9% being Asian, Asian British or Asian Welsh. This is approximately 2% greater than the regional average and, with the exception of Seaton (1.9%), is a major exception to the parish average across East Devon, all of which are lower than the countywide average.

Geography	Total	Asian, Asian British or Asian Welsh	Black, Black British, Black Welsh, Caribbean or African	Mixed or Multiple ethnic groups	White	Other ethnic group
Axminster	8,186	1.4%	0.1%	1.3%	96.9%	0.3%
Budleigh Salterton	5,259	0.5%	0.2%	0.9%	98.3%	0.1%
Colyton	3,296	0.6%	0.1%	0.7%	98.3%	0.3%
Cranbrook	6,581	1.2%	0.6%	2.0%	95.6%	0.6%
Exmouth	35,493	0.9%	0.2%	0.9%	97.8%	0.2%
Honiton	11,329	1.0%	0.2%	1.2%	97.2%	0.3%
Ottery St. Mary	7,904	0.8%	0.2%	1.5%	97.3%	0.3%
Seaton	7,684	1.9%	0.3%	1.0%	96.5%	0.4%
Sidmouth	14,383	1.3%	0.2%	1.1%	97.0%	0.4%
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

3.4. Sex

Geography	Population	Female	Male
Axminster	8,125	52.1%	47.9%
Budleigh Salterton	5,235	54.0%	46.0%
Colyton	3,278	52.8%	47.2%
Cranbrook	6,553	50.2%	49.8%
Exmouth	35,499	52.4%	47.6%
Honiton	11,334	52.5%	47.5%

Ottery St. Mary	7,894	52.5%	47.5%
Seaton	7,688	53.3%	46.7%
Sidmouth	14,377	53.5%	46.5%

East Devon	150,828	51.9%	48.1%
Exeter	130,709	51.3%	48.7%
Mid Devon	82,852	51.2%	48.8%
Teignbridge	134,803	51.5%	48.5%

Devon	811,640	51.5%	48.5%
South West	5,701,186	51.1%	48.9%

Table 3.4 2021 Census sex distribution

3.4.1. The East Devon average proportion of females (51.9%) marginally outweighs that of the county (51.5%), which in turn marginally outweighs the regional average (51.1%). This correlates with the increased proportion of elderly people in East Devon compared to Devon, in turn compared to the South West as uncovered in section 3.1 above. This is not surprising given that at a national (and international) scale, life expectancy for females outweighs that of males[5]. This means that more females are to be expected in the population, especially if that demographic is significantly older.

3.4.2. Cranbrook possesses a much more even split of females to males at 50.2% females to 49.8% males; again correlating with its notably younger age demographic as identified in section 3.1.4.

5 https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/lifeexpectancies/bulletins/nationallifetablesunitedkingdom/2021to2023

4. Travel to Work Data

4.1. Travel to Work Census Areas

4.1.1. Most of East Devon falls into the Exeter Travel to Work (TTW) Area. The city of Exeter lies on the western edge of East Devon and 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. Exmouth's role within East Devon as the district's strategic town centre serves as a local employment draw. However, Sidmouth is the other more dominant employment centre in the district and has its own travel to work area.

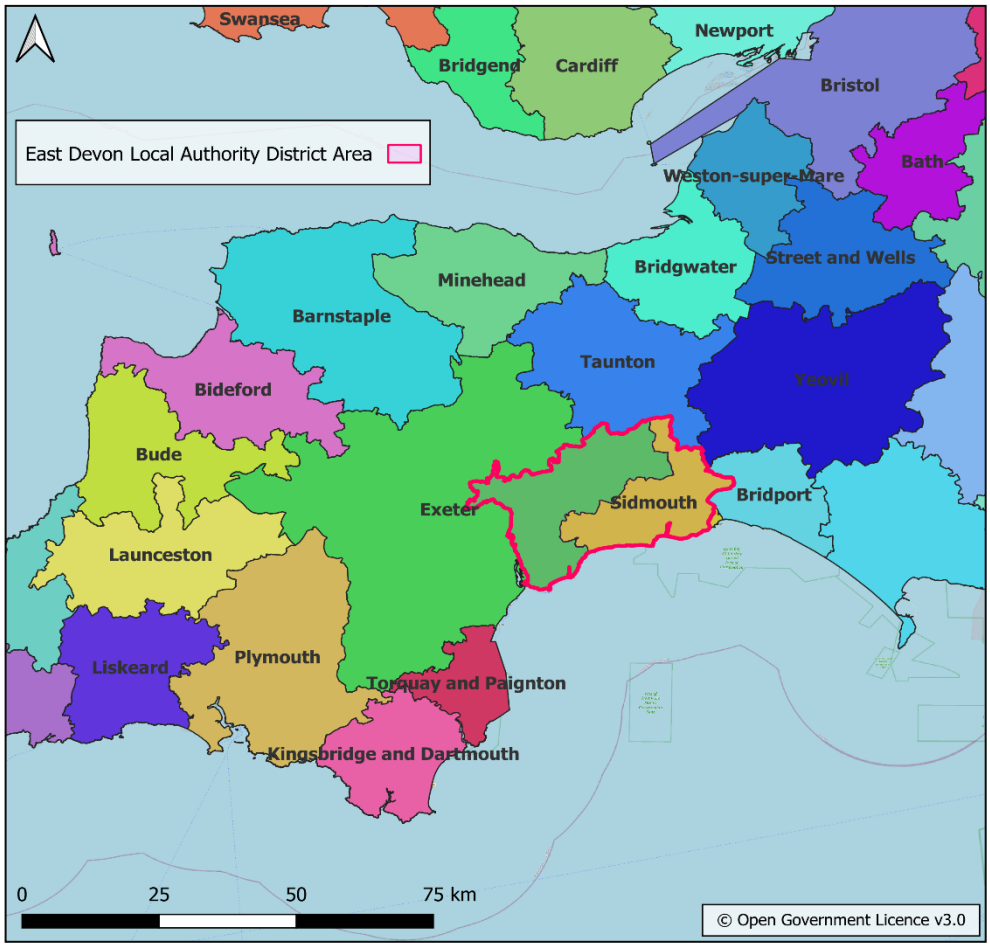


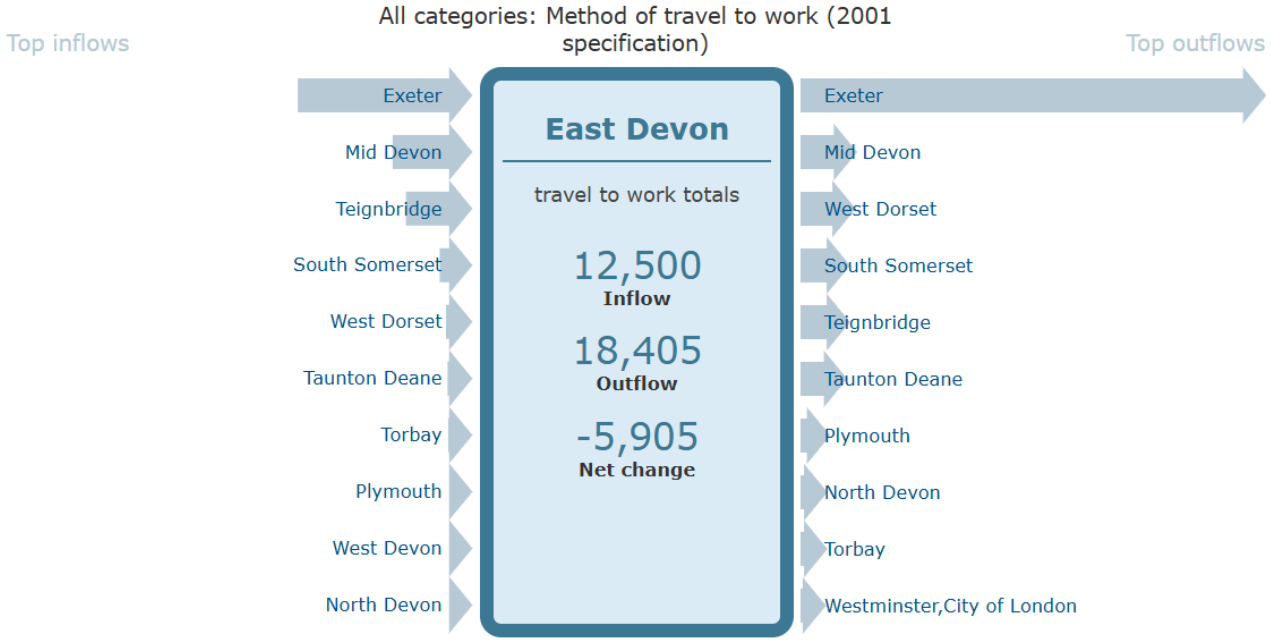
Figure 4.1 2011 Census Travel to Work Areas for the South West

4.1.2. According to the 2011 census[6], 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. The 2011 TTW areas show that the main employment draw for East Devon is Exeter. Another large proportion of the district falls into the Sidmouth TTW area; Colyton, Seaton, Axminster and Sidmouth itself are included here.

4.1.4. 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 Wales, again behind only Cambridge *(ONS Towns and*

Cities analysis 2016). In comparison, East Devon has a negative total commuting flow of -5,905 as more people leave the district for work than travel in.



[7]

Figure 4.2 2011 East Devon Travel to Work totals

4.1.5. The numbers of those travelling for work in East Devon have been further disaggregated by origin, segregated into groups of those:

- Living and working in East Devon
- Living outside East Devon and working in East Devon
- Living in East Devon and working outside East Devon

4.1.6. 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 East Devon and work at home are not included in this table.

[6] 2021 census data does not provide equivalent travel to work data, therefore 2011 census data is used

[7] 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 East Devon	**26,468**	**67.6**	2.9	0.8	22.7	3.4	2.6
COMMUTE IN to East Devon	**12,500**	**82.7**	4.2	2.2	6.2	1.7	3.0
COMMUTE OUT of East Devon	**18,405**	**83.4**	3.9	5.9	2.7	1.7	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

4.1.7. There are approximately 26,500 people who live and work in East Devon. Almost 2/3 of those commuting out of East Devon are to locations in Exeter. In terms of modal splits, the majority of those who are commuting in or out of East Devon do so by car (approximately 83%). More people use public transport to commute out of East Devon (10%) than to commute in (6%) and to commute within East Devon (4%). Active travel is greater amongst in-commuters (8%) than out-commuters (4%); however these are both far less than the proportion of those who use active travel to commute within East Devon (26%). By extension, the proportion of those who use a car to commute within East Devon is also lower at 68%.

4.1.8. The proportions across East Devon are very similar to those living and working in, commuting to and commuting from Devon into other counties. Car travel is marginally lower for those living and working in East Devon compared to Devon, yet greater for those who commute out of East Devon compared to out of Devon itself. A key difference is found between living and working in East Devon compared to in Devon where a notably greater proportion of East Devon residents walk as a means of commuting; 22.7% versus 18.7%, respectively.

4.2. Travel to Work draw across East Devon

4.2.1. The following section aims to identify and analyse commuting trends across East Devon, both to Exeter and Exmouth as well as 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. These can

be grouped to extract demographic data for particular settlements, which may contain multiple MSOAs.

4.2.3. The MSOAs combined to create settlement areas, which are used as proxies for key settlements (e.g. Exmouth) in subsequent tables, are shown in Figure 4.3 below.

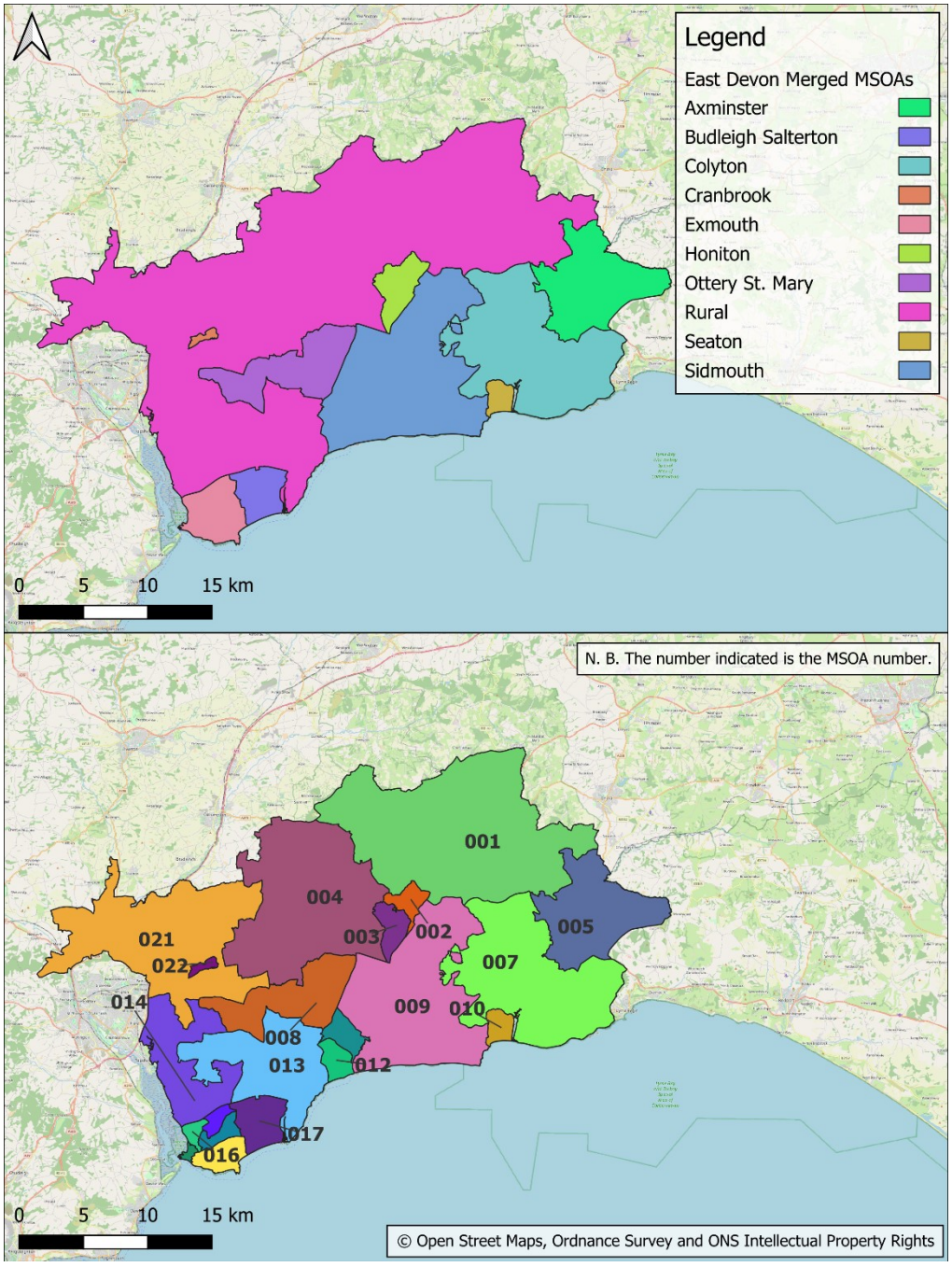


Figure 4.3 Combined and separate East Devon 2021 MSOA zones used in analysis

4.2.4. It is also worth noting that a large proportion of this section is based on 2011 census data and as such pertains to 2011 MSOA boundaries. These have been updated in the 2021 census to include a newly-defined Cranbrook MSOA (022 in Figure 4.3).

Exeter Travel to Work draw

4.2.5. The numbers of trips by MSOA zone in East Devon, effectively representing the magnitude of the draw to Exeter, are shown in Figure 4.4. Generally, the draw is stronger closer to the city with the attraction decreasing with distance; therefore, there are a greater number of commuters to Exeter on the west of the district (in MSOA zone 021; rural) compared to the east (005; Axminster). However, there is also a particularly strong draw to Exeter from the Exmouth area, perhaps showcasing the robust pre-existing transport links between the two settlements.

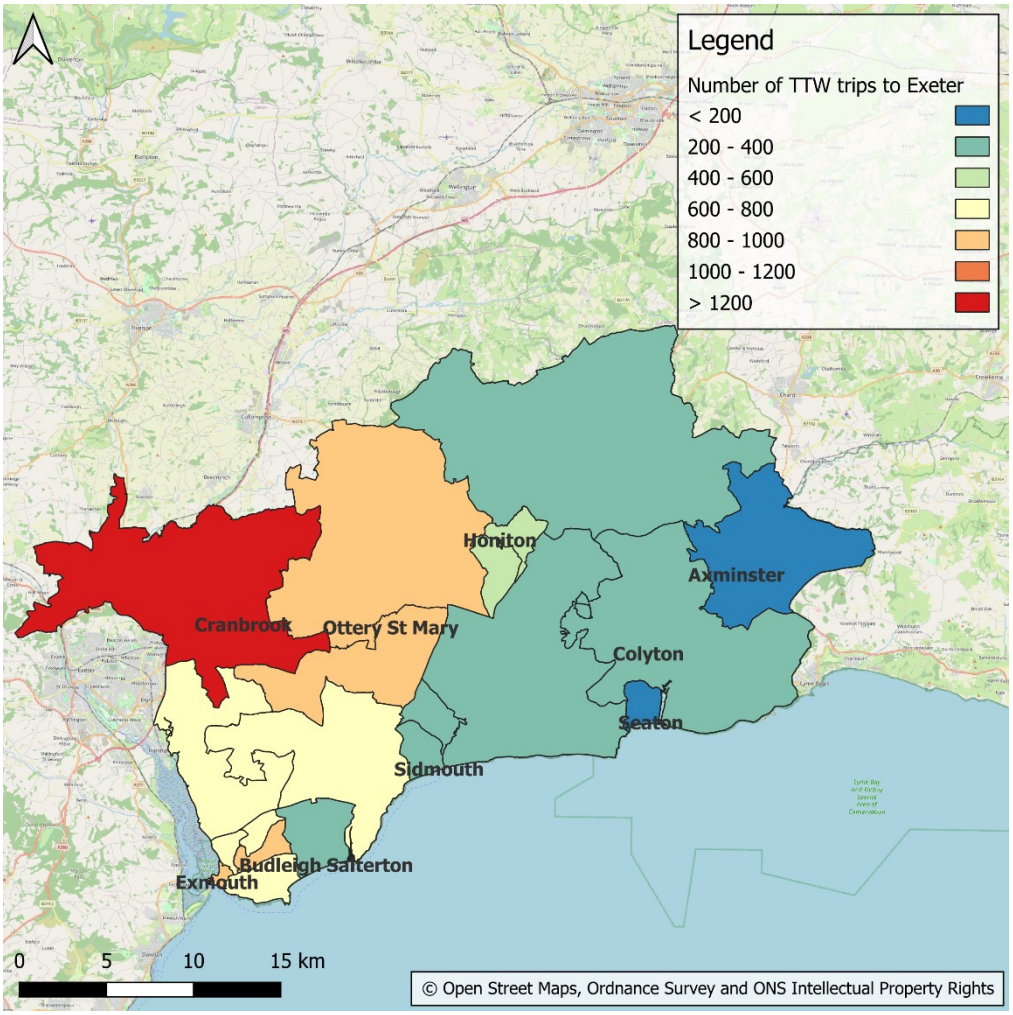


Figure 4.4 TTW trips to Exeter (2011), by MSOA area in East Devon

4.2.6. By magnitude, the combined “Rural” area has the highest number of its population working in Exeter, with 4,100 commuters. This is also the area with the highest proportion of residents working in Exeter out of all the areas (25%), although both Exmouth and Ottery St. Mary are a joint close third, with approximately 24% of their populations working in Exeter.

4.2.7. Perhaps reflecting the relative distance to Exeter, areas of Axminster (5%), Colyton (6%) and Seaton (7%) have noticeably lower numbers commuting to Exeter, both in terms of the raw figures and the percentage of residents living in those areas.

Sidmouth Travel to Work draw

4.2.8. Sidmouth is the second-largest travel to work destination within the East Devon district boundary; occupying the southeastern corner as shown in Figure 4.1. The magnitude of its draw is concentrated to the southern centre of the district, in close proximity to Sidmouth itself. This suggests a low level of in-commuting as the rest of the district has a low number of travel to work trips to Sidmouth in comparison to Sidmouth itself.

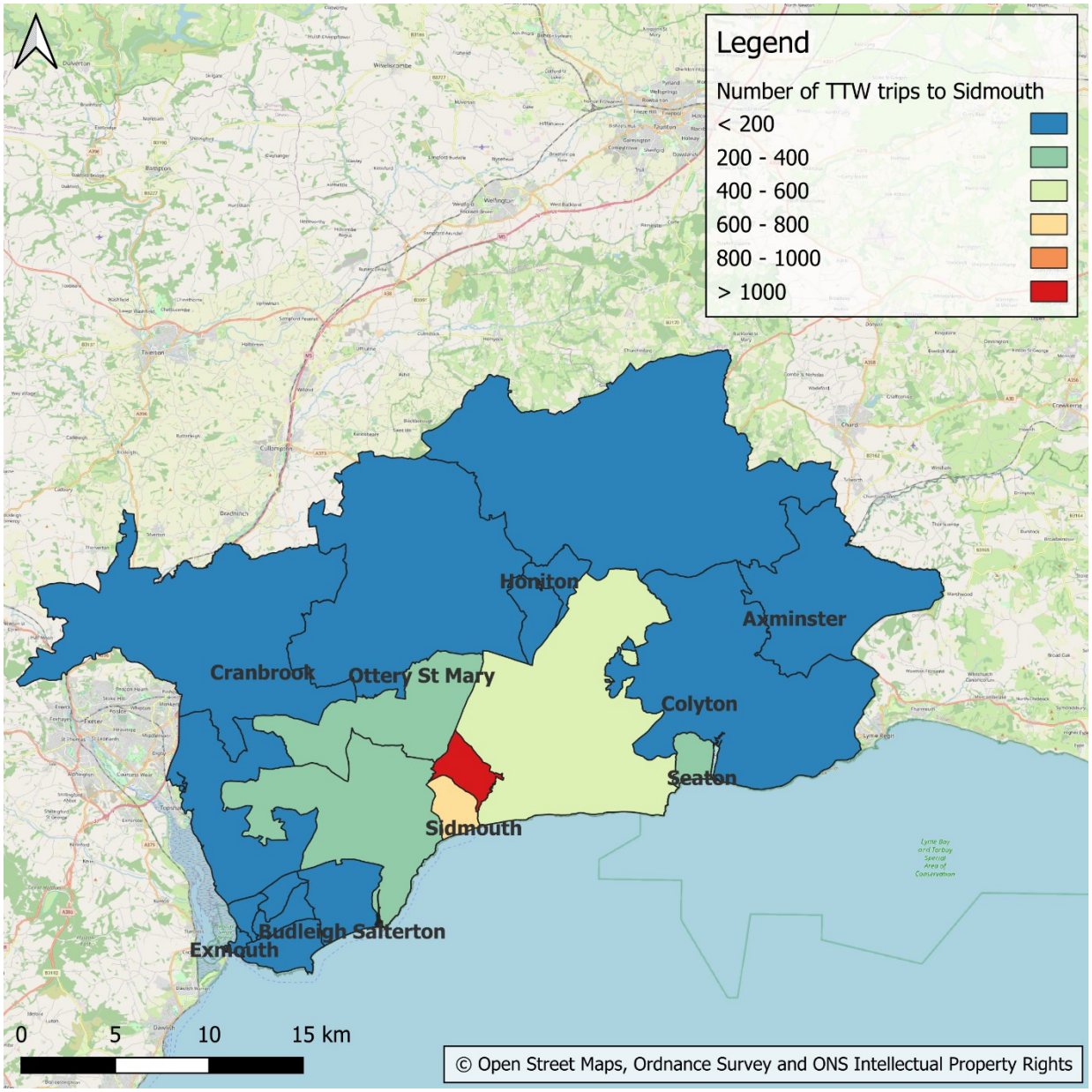


Figure 4.5 TTW trips to Sidmouth (2011) by MSOA area in East Devon

Per MSOA Zone Travel to Work draw

4.2.9. To gauge an understanding of the relative number and proportions from across East Devon, 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.

4.2.10. For the entirety of East Devon with the exception of Sidmouth itself and Seaton, the percentage of travel to work trips to Exeter is significantly higher than the percentage of trips to Sidmouth. The largest number of travel to work trips to Sidmouth is from within Sidmouth itself, at one third of the working population.

4.2.11. By contrast, only 2% of the working population in Exmouth and Axminster travel to work in Sidmouth. In Axminster, almost twice the number of trips are made to Exeter compared to the number of trips to Sidmouth, reflecting better transport links to the economic centre of Devon despite it being almost twice the distance as the crow flies.

4.2.12. Across East Devon, 14% of workers work in the same MSOA as they live. This level of self-containment is variable within East Devon – in Axminster, 31% of the working population live and work in the same MSOA, whilst only 9% of the Exmouth working population live and work in the same MSOA.

4.2.13. A large number of the working population also class themselves as working from home. In Colyton, this is 26% of the working population. The lowest figure is from Honiton at 10% of the working population, significantly greater than the percentage of workers who travel from many areas to Sidmouth. It is important to note that these statistics are from 2011, given the disruption to the 2021 data, so these are likely to have changed since then.

4.2.14. A large geography of travel to work trips suggests that there is less pressure on single commuter routes as the traffic is dispersed.

MSOA Zone	Population		Working within MSOA %	Working elsewhere in East Devon %	Work from home %
	Total	Working Population			
East Devon	132,457	59,908	14%	30%	17%
Exmouth	34,432	15,945	9%	40%	11%
Rural	32,407	16,335	12%	20%	22%
Sidmouth	16,889	6,727	15%	35%	21%
Honiton	11,483	5,396	16%	39%	10%
Axminster	8,180	3,700	31%	16%	17%
Colyton	8,044	3,438	11%	28%	26%
Seaton	7,096	2,653	25%	33%	15%
Ottery St. Mary	7,959	3,573	13%	29%	16%
Budleigh Salterton	5,967	2,141	16%	31%	19%

Table 4.2: Travel to work trips by MSOA origin and destination (2011)

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 East Devon 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 increased in home-working.

		Distance travelled to work										
Area	**Year**	**< 2km**	**2 - 5km**	**5 - 10km**	**10 - 20km**	**20 - 30km**	**30 - 40km**	**40 - 60km**	**> 60km**	**Commuting Total**	**WFH**	**Other***
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
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
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 a reduction in the number of trips made across all commuting distances from 2011 to 2021 with the exception of an increase in the number of trips made in the 30-40km range in East Devon. This is consistent with an overall decrease in the total number of commuting trips across all chosen districts. East Devon has the lowest reduction in the total number of trips at 18%, Exeter the greatest at 30%. This in itself is consistent with the trends in trips taken across the country as revealed in the recent National Travel Survey 2023[8].

4.3.4. The reduction in these commuting trips is in conjunction with an increase in those working from home. East Devon faced a 96% increase in people working from home which compares with a 77% increase in Mid Devon and a 279% increase in Exeter. 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 patterns[9].

4.4. Travel to Work by Mode

4.4.1. The changing mode splits for commuters from 2011 to 2021 for all areas in East Devon 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.

[8] https://www.gov.uk/government/statistics/national-travel-survey-2023/nts-2023-introduction-and-main-findings
[9] 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
East Devon	2011	17%	2%	3%	63%	2%	11%	2%
	2021	30%	1%	2%	55%	2%	9%	2%
Exmouth	2011	11%	3%	4%	64%	3%	13%	2%
	2021	24%	1%	3%	55%	3%	12%	2%
Sidmouth	2011	21%	1%	3%	56%	3%	15%	1%
	2021	31%	0%	1%	52%	2%	12%	2%
Honiton	2011	10%	3%	1%	66%	1%	17%	2%
	2021	21%	1%	1%	60%	1%	13%	2%
Axminster	2011	17%	2%	2%	61%	1%	16%	2%
	2021	24%	1%	1%	62%	1%	10%	2%
Cranbrook[10]	2011	-	-	-	-	-	-	-
	2021	28%	1%	4%	60%	2%	3%	2%
Seaton	2011	15%	1%	4%	60%	2%	17%	1%
	2021	20%	1%	2%	59%	2%	15%	2%
Budleigh Salterton	2011	19%	2%	2%	65%	2%	9%	2%
	2021	33%	1%	1%	54%	1%	7%	2%
Ottery St. Mary	2011	16%	1%	2%	70%	2%	7%	2%
	2021	36%	0%	1%	52%	1%	7%	2%
Colyton	2011	26%	1%	1%	61%	1%	7%	2%
	2021	35%	0%	1%	56%	1%	5%	2%
Rural	2011	22%	3%	2%	63%	2%	6%	3%
	2021	36%	1%	1%	53%	2%	5%	2%

Table 4.4 Modal split for commuters 2011 to 2021 in East Devon

[10] No data exists for Cranbrook in 2011 as it was not yet constructed.

	Year	Work from home	Train	Bus	Car	Bicycle	On foot	Other	Total
Trips	2011	10,081	1,399	1,541	37,637	1,286	6,647	1,317	49,827
	2021	19,757	540	1,159	36,988	1,177	5,856	1,251	46,971
% change 2011 to 2021		**96%**	**-61%**	**-25%**	**-2%**	**-8%**	**-12%**	**-5%**	**-6%**

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

4.4.2. In terms of gross numbers, between 2011 and 2021 the number of travel to work trips in East Devon has moderately decreased, by 6% as shown in Table 4.5. This is in correspondence with a significant increase in the number of those working from home, which almost doubled between 2011 and 2021. The balance between modes of transport has been redistributed as all modes have generally decreased, both in terms of proportions and gross numbers.

4.4.3. 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.

4.4.4. Over this period, travel to work trips on foot remained the second most popular mode of travel in every area (aside from Cranbrook where it is marginally superseded by bus use). 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 (61% and 25% change, respectively) than others. This is likely due to the social distancing rules that were in place during the Census.

4.4.5. It should be stressed that this data does not confirm at what time in the day these trips are taking place.

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

4.5.1. To explore how the transport travel to work patterns for East Devon 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
East Devon	**66,728**	**52%**	**30%**	**1%**	**2%**	**3%**	**9%**	**2%**
Exeter	59,699	37%	31%	1%	5%	4%	16%	5%
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 East Devon has a similar percentage of car commuting (52%) to most other districts in Devon. The city of Exeter has the lowest level of car commuting (37%), typical of an urban area with an extensive public transport network and many facilities within walking and cycling distances. East Devon contains the third largest settlement in the county (Exmouth) as well as less populous rural areas, and car use remains high. This is not as high as other more rural districts such as Torridge (57%) and Teignbridge (54%).

4.5.3. 3% of commuters from East Devon use public transport (bus or train) which is the equal second highest (with Teignbridge) after Exeter (6%). This is the same as the proportion across both the county and the South West as a whole.

4.5.4. Active modes (walking and cycling) were used by 11% of East Devon commuters in the 2021 census. This is the third highest use across the county after Exeter (21%)

and North Devon (15%). This is comparable with active travel use in other districts in Devon and marginally lower than across the South West region.

4.5.5. 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
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%
Exmouth	East Devon	52%	24%	1%	3%	4%	3%	12%	2%
Sidmouth	East Devon	50%	26%	0%	2%	4%	2%	15%	2%
Kingsteignton	Teignbridge	63%	21%	1%	1%	4%	1%	7%	2%
Cullompton	Mid Devon	58%	22%	0%	2%	5%	1%	9%	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%
Crediton	Mid Devon	50%	23%	0%	3%	4%	1%	17%	2%
Exeter	Exeter	37%	31%	1%	5%	4%	5%	16%	2%

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

4.5.6. 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.

4.5.7. In East Devon, the highest sustainable mode split is observed in Seaton. In Seaton and Sidmouth, walking and cycling account for approximately 1 in 6 of all trips.

4.5.8. A total public transport split in East Devon in excess of 5% is only observed in Cranbrook, with similar proportions found in Teignmouth and Dawlish in Teignbridge.

4.5.9. In Table **4.7**, the coastal towns of Dawlish and Teignmouth in Teignbridge have the highest rail mode splits, most likely reflecting that the majority of dwellings in these settlements are within 1km of the rail station. In East Devon, this is replicated in the central Exmouth town ward, with a rail mode split of 3%, although this split is reduced when figures for the rest of Exmouth are included.

4.5.10. In East Devon, Axminster and Cranbrook are the towns with the greatest car use. 62% and 60% respectively drive or are driven to their place of work. Furthermore, in Cranbrook just 3% walk to work, the lowest proportion of any town studied in Table **4.7**. This is likely because of the lack of employment opportunities currently within the town, with many residents travelling to Exeter, which is around 4-6 miles west of Cranbrook, for work. However, the proportion walking to work is expected to increase as Cranbrook town centre becomes more established.

4.5.11. The levels of self-containment in each town identify the proportion of residents in each town who work within that town. Intuitively, you would expect the largest towns, with a greater number of jobs, services and amenities to have the highest levels of self-containment.

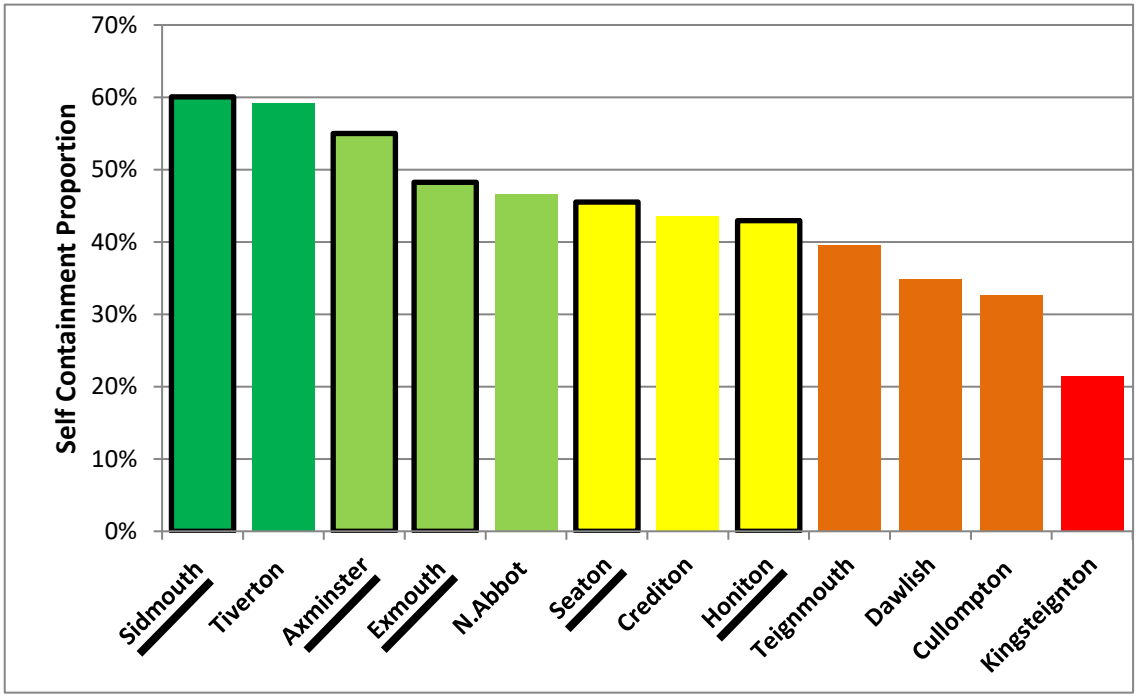


Figure 4.6 Proportion of working population of key towns in the Exeter TTW area that work within the town they live in (2011 Census TTW)

4.5.12. For the Greater Exeter area, this is detailed in Figure 4.6, which highlights some significant disparities between the towns. This graphic includes people working from home in the proportion of the population working within the town they live in, and uses 2011 Census data, due to the limited reliability of 2021 data.

4.5.13. Within East Devon, Sidmouth and Axminster show the highest levels of self-containment, with close to 60% of the working population working within the town. Sidmouth has the highest self-containment of any town in the Greater Exeter area.

4.5.14. Exmouth also has a relatively high level of self-containment, with nearly 50% of the working population working within the town.

4.5.15. Among towns in East Devon, Seaton (46%) and Honiton (43%) have the lowest levels of self-containment. However, these figures are still significantly greater than for the town in the Greater Exeter area with the lowest level of self-containment, Kingsteignton, where only 21% of residents work in the town.

5. Walking

5.1. TTW Numbers

5.1.1. As identified in the Travel to Work data in Section 3, walking is the second most popular mode of travel to work in each area in East Devon, except for Cranbrook. This is reaffirmed in Table 5.1 below, which shows that over 5,500 people in the East Devon area walk to work.

MSOA Location (residence)	Walk TTW Mode Split		Walk TTW numbers
	2011	2021	2021
East Devon	**11%**	**9%**	**5,855**
Exmouth	13%	12%	1,864
Sidmouth	15%	12%	798
Honiton	17%	13%	696
Axminster	16%	10%	427
Cranbrook	-	3%	106
Seaton	17%	15%	426
Budleigh Salterton	9%	7%	161
Ottery St. Mary	7%	7%	288
Colyton	7%	5%	179
Rural	6%	5%	910

Table 5.1: Walk Travel to Work Census Data

5.1.2. The walking TTW mode split is shown below in Figure 5.1. This demonstrates that while the majority of East Devon has low rates of commuting by foot, there are centres where walking is a more prevalent mode of commuting. This tends to replicate the larger population centres, such as in Exmouth, Sidmouth, Seaton and Honiton.

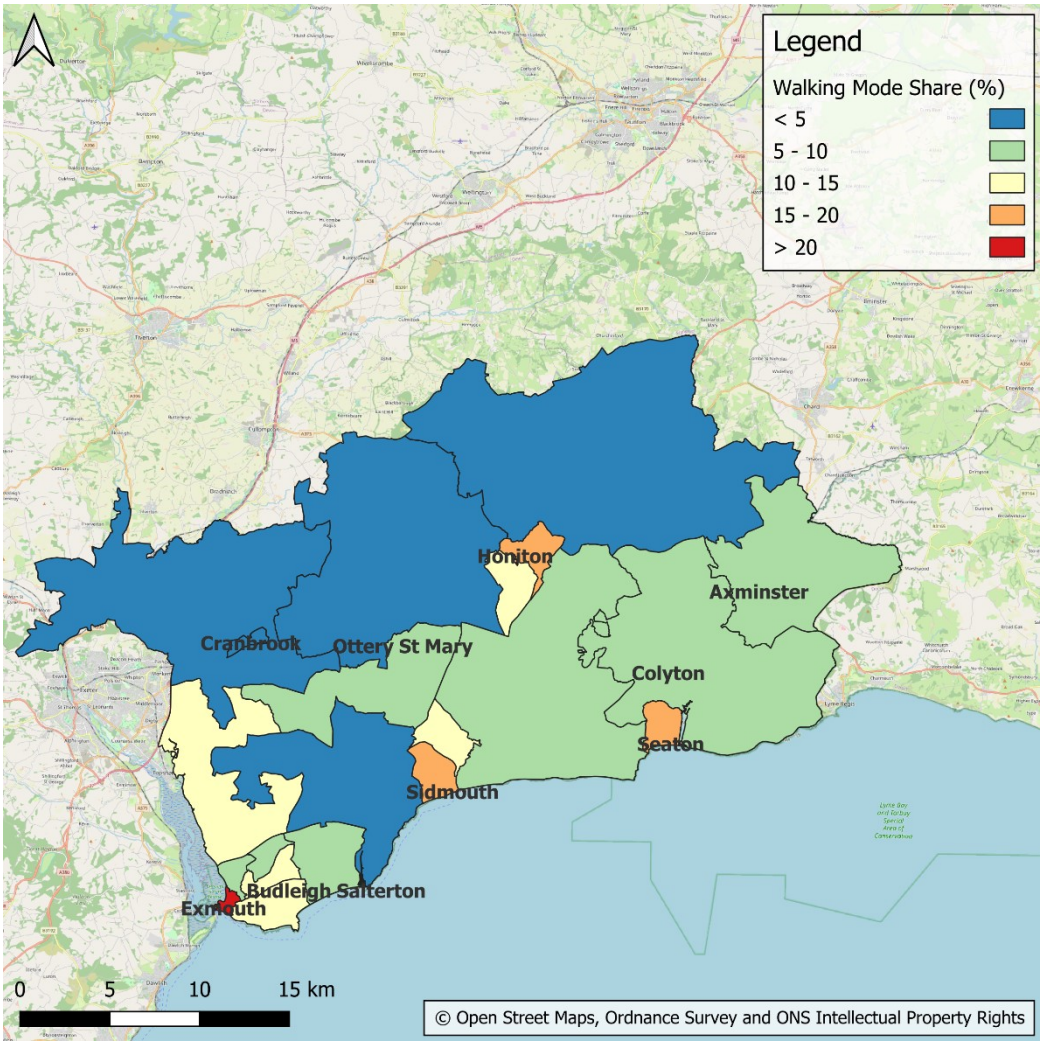


Figure 5.1: Walking TTW mode split across East Devon

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 Survey[11] (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.

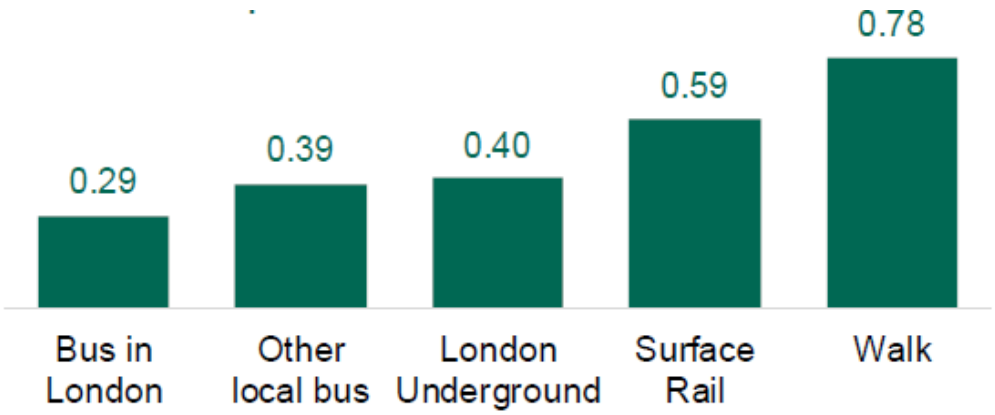


Figure 5.2: Average length in miles of a walking stage by main mode

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.

[11] 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 also forms a key part of the County's cycle network, with many routes providing an attraction to tourism as well as a transport utility function.

6.1.2. The local cycle network in East Devon has been significantly enhanced in recent years, including:

- **Exe Estuary Trail**. Construction of 16-mile mostly off-road trail running either side of the Exe Estuary, connecting Exmouth to Exeter and Dawlish.
- **National Cycle Network (NCN) Route 2**. Construction of new sections of off-road trail, including that between Seaton and Colyford through the Seaton Marshes Nature Reserve
- **Otter Trail.** Development of a multi-use trail largely along the River Otter has advanced to now be included as part of the Devon Countywide Local Cycling and Walking Infrastructure Plan (LCWIP). This would build on the existing section of trail between Bowd and Tipton St John, which is on NCN Route 248.

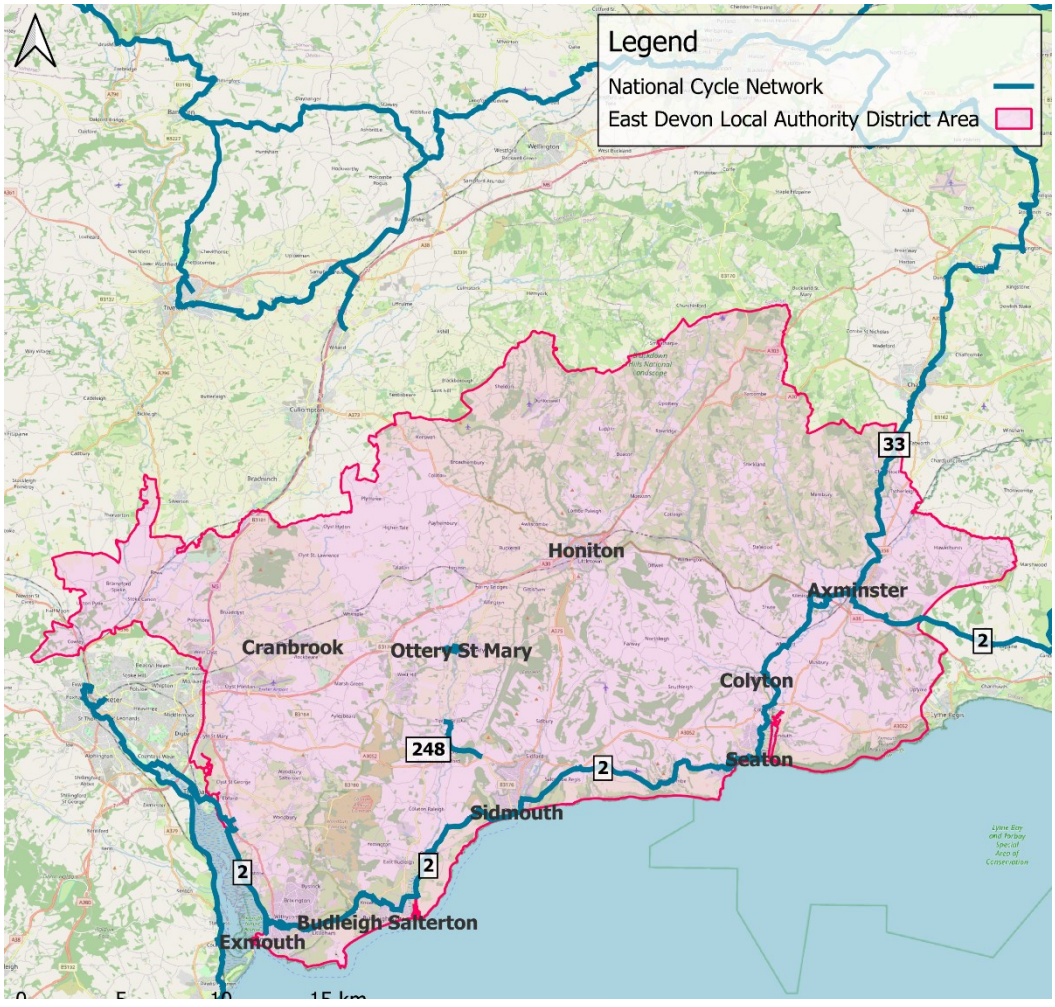


Figure 6.1 National Cycle Network in East Devon

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 Clyst Valley and New Communities LCWIP has recently been endorsed by East Devon Highways and Traffic Orders Committee (HATOC) and is planned to be formally adopted by Devon County Council at Cabinet in March 2025.

6.1.4. The Clyst Valley and New Communities LCWIP area currently has an inconsistent level of cycle infrastructure, with some excellent facilities, such as Redhayes Bridge on the E3/E4 route between Exeter and Cranbrook, and less attractive sections such as the E2 route between West Clyst and Broadclyst. However, the area faces significant challenges to increasing cycle use, including the current low levels of cycling, the rural nature of many routes and fragmented existing network. The local LCWIP aims to combat these challenges through developing new traffic free and low-traffic cycle routes.

6.2. Modal Splits

6.2.1. As shown in Table 6.1, since 2011 the travel to work modal share for cycling has stayed the same, staying at approximately 2% across East Devon.

	Cycle TTW Mode Split		Cycle TTW numbers
MSOA Location (residence)	2011	2021	2021
East Devon	**2%**	**2%**	**1,177**
Exmouth	3%	3%	396
Sidmouth	3%	2%	117
Honiton	1%	1%	54
Axminster	1%	1%	39
Cranbrook	-	2%	57
Seaton	2%	2%	43
Budleigh Salterton	2%	1%	32
Ottery St. Mary	2%	1%	56
Colyton	1%	1%	47
Rural	2%	2%	336

Table 6.1: Cycle Travel to Work Census data

6.2.2. The TTW work cycling mode share for each area across East Devon are shown below in Figure 6.2. While low throughout, the modal split varies considerably across East Devon. The highest mode split is observed in areas closest to major population centres (such as Exmouth) where the distance of commute is such that cycling is a realistic option.

6.2.3. Accordingly, the highest cycle modal share across East Devon is observed in central Exmouth (4%). 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 Exmouth itself and in Exeter. Conversely, mode splits of less than 1% are prevalent outside of the main towns. This will reflect a combination of lack of dedicated infrastructure and distance to employment. This is best exemplified in the

rural area in the north-east area of the district occupied predominantly by the Blackdown Hills National Landscape.

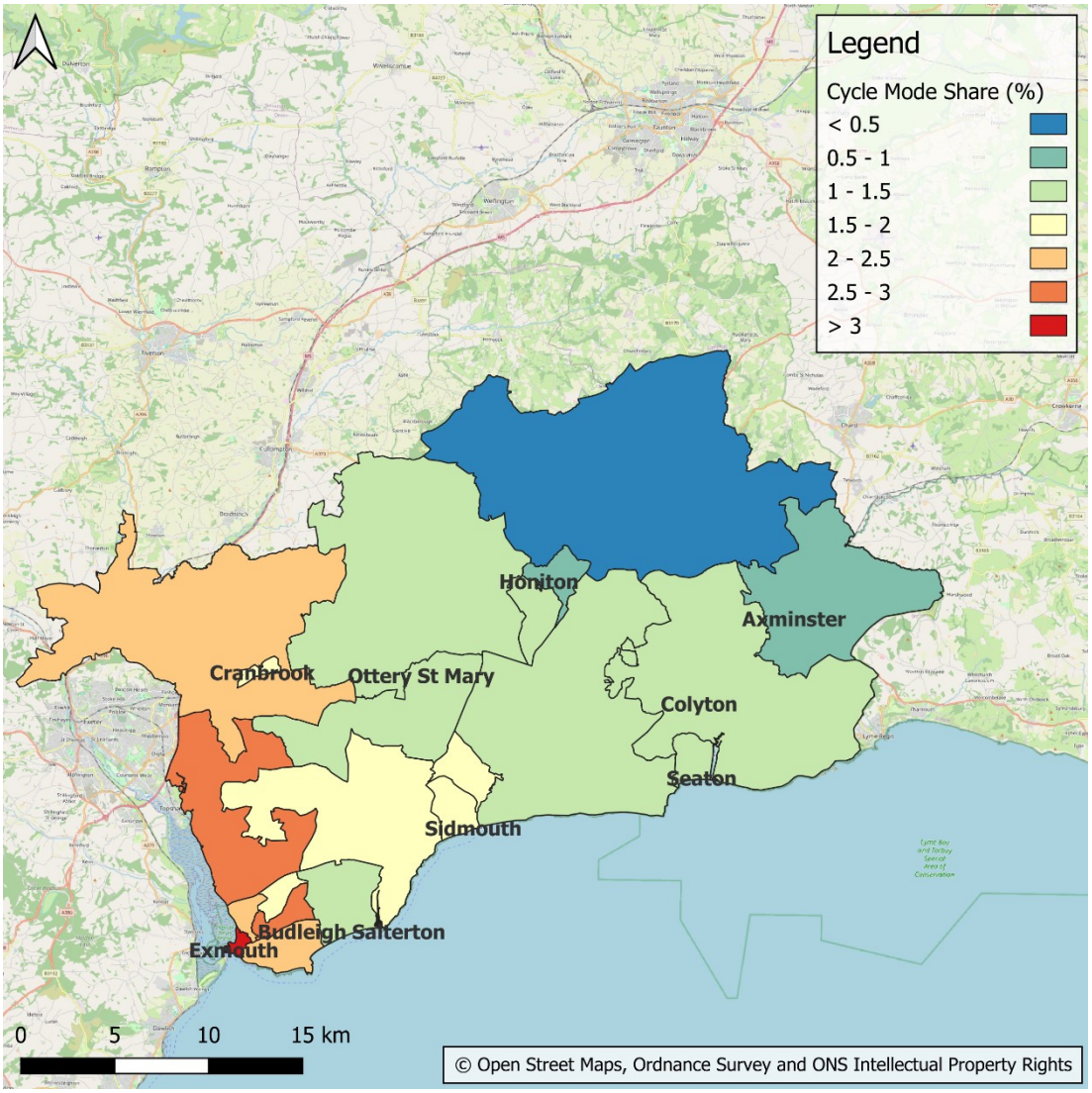


Figure 6.2: Cycling TTW mode split across East Devon

6.3. Usage

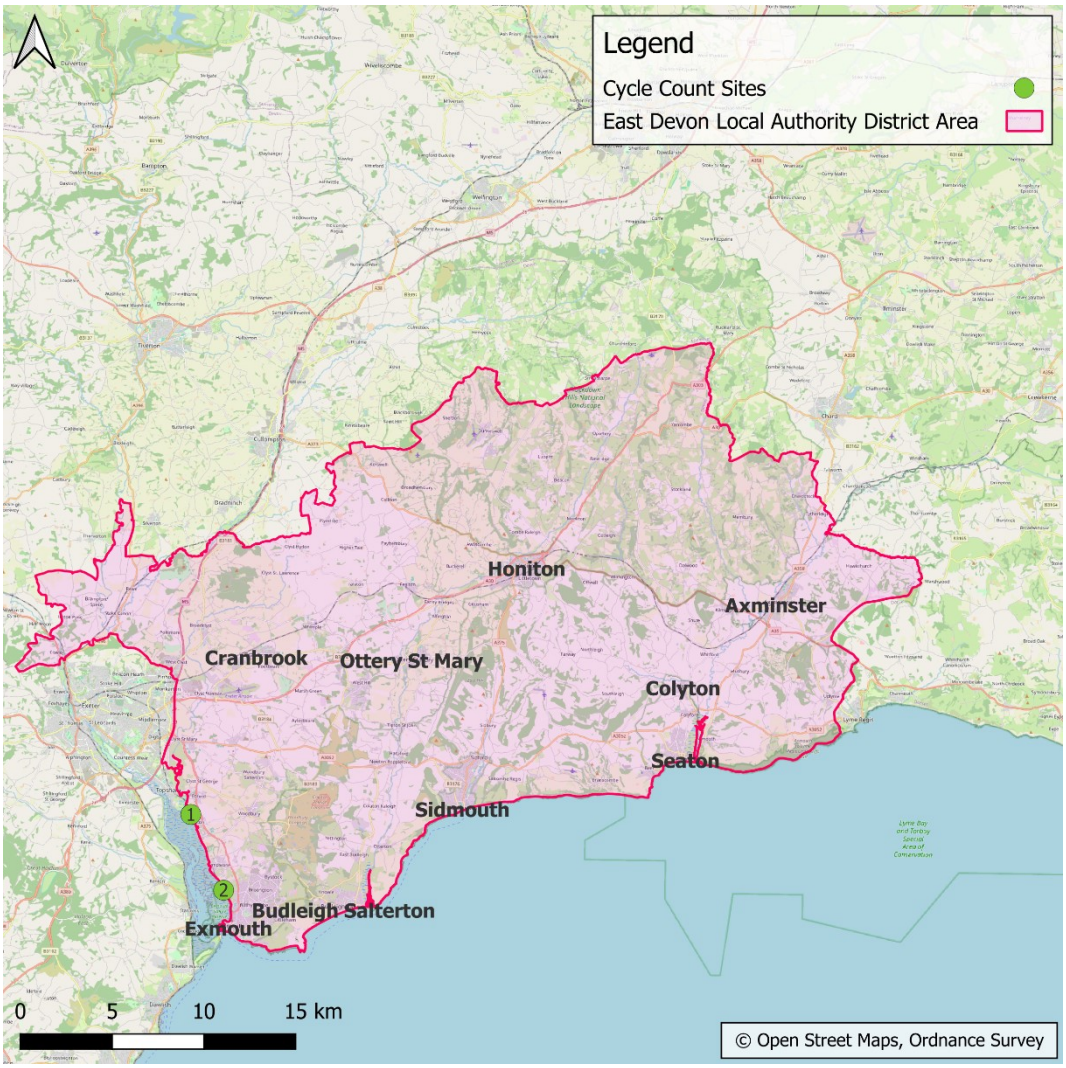


Figure 6.3 Location of cycle counter sites

6.3.1. The usage of cycle routes has been obtained from a review of 2 automatic cycle counters across the East Devon area. These sites, the locations of which are shown in Figure 6.3 below, have at least 5 years of data therefore allowing the changing usage to be reviewed. The associated AADT (annual average daily traffic) data for these sites is collated in Figure 6.4.

6.3.2. It should be noted that this does not give a full picture of East Devon as the counters are concentrated along the Exe Estuary Trail near to Exmouth and Exeter.

6.3.3. Figure 6.4 shows strong growth in cycling in the two locations in 2020 which may be linked with an increase in cycling associated with COVID-19. Both locations experienced a reduction in cycle traffic following this year. Greater growth can be seen across the 5 year period from 2019 to 2024 closer to Exmouth.

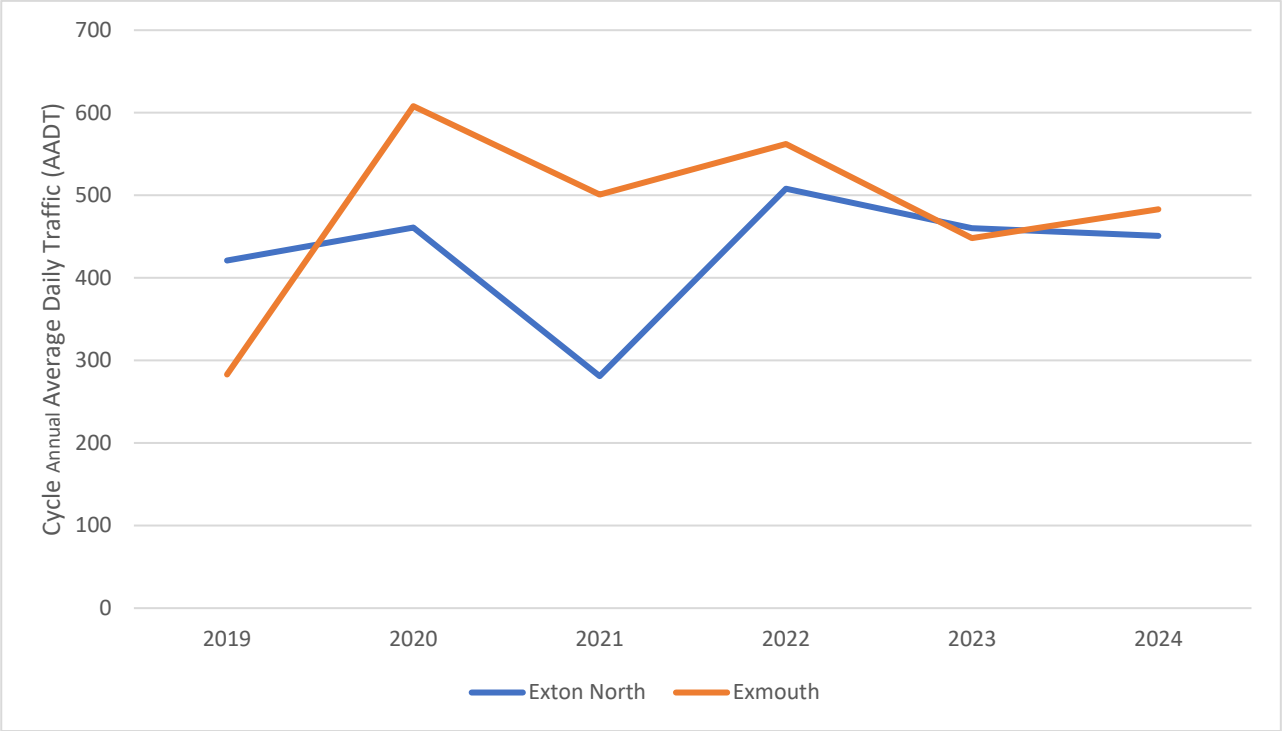


Figure 6.4 AADT at cycle count sites

6.4. Daily profile

6.4.1. The automatic count data has also been reviewed to identify the daily profile on the Exe Estuary Trail. The 2 sites from Figure 6.4 above are shown again in Figure 6.5 but as 24-hour profiles based on 2024 data.

6.4.2. During the late evening and early morning, i.e. between 20:00 and 06:00, cycle flows are very low, at less than 10 cycles per hour. The biggest flows are in the idle of the day, suggesting these routes are used more as a leisure route than by people commuting to work.

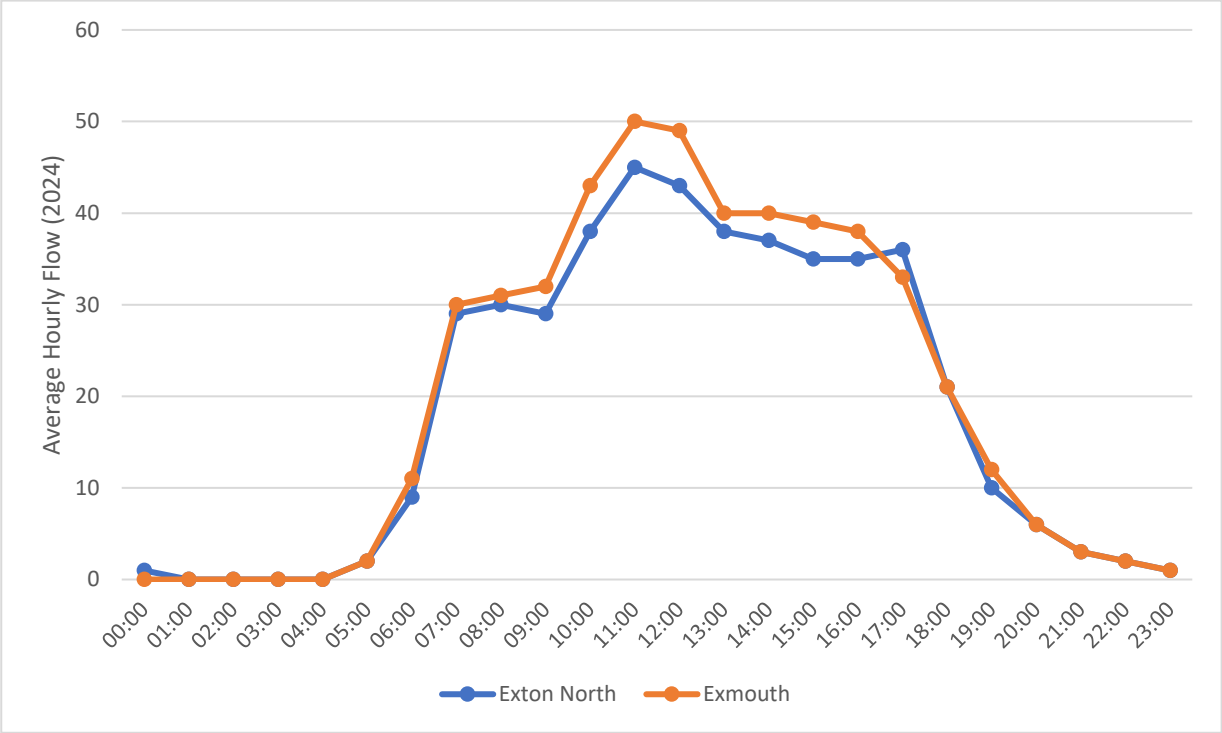


Figure 6.5 Daily flow profile at cycle count sites (2024)

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, is shown in Figure 6.6.

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 better weather and thus more favourable cycling conditions. Conversely, flows are lowest in the winter months. The difference is quantified by an approximate doubling of flows between winter and summer months. The pattern across both cycle counters is very similar, perhaps indicating that there is consistent usage across the whole length of the Exe Estuary cycle path. This also suggests more leisure cyclists than commuters using the route in the summer months.

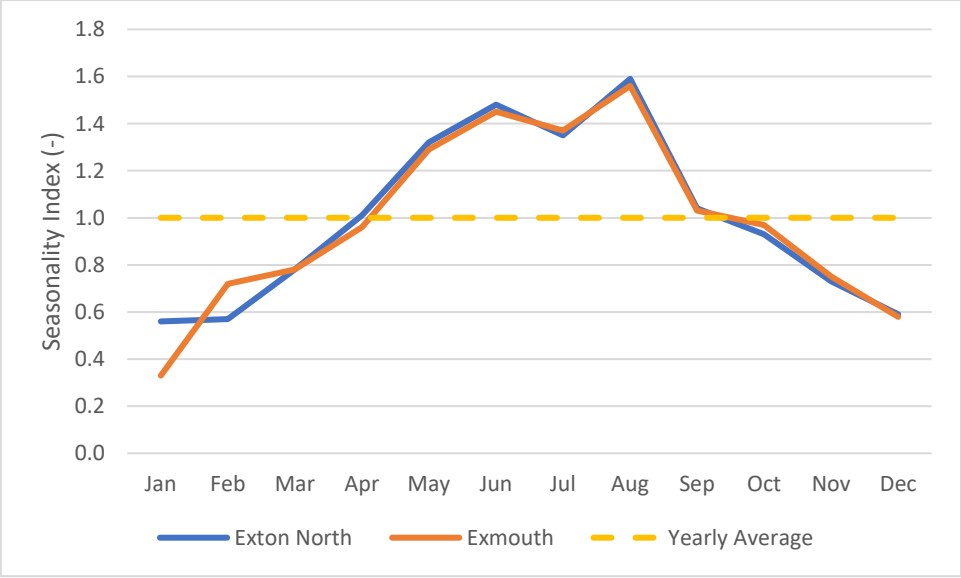


Figure 6.6 2024 cycle seasonality

7. Public Transport – Bus

7.1. Introduction

7.1.1. This section explores the bus offer across East Devon 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)[12] in Autumn 2021, and published an update in June 2024. Along with setting out future plans and aspiration, the document provides analysis of the trends in public transport offerings and take-up across the county, referenced in this section.

7.1.2. In comparison with other rural counties, over the past 10 years the bus network in Devon has remained relatively stable, with DCC largely maintaining its bus service support[12]. Figure 7.1 is an excerpt from the Travel Devon[13] bus map showing the coverage of the bus network across East Devon, individual town maps for local bus services can also be accessed through the webpage.

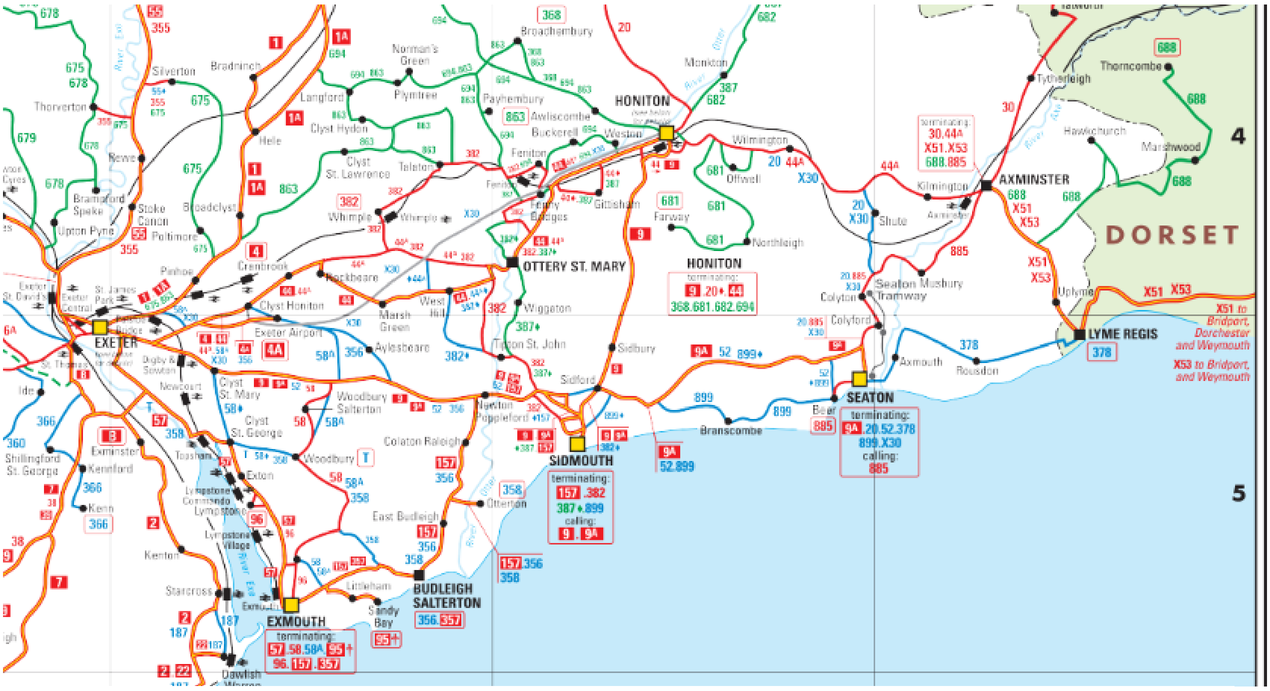


Figure 7.1 East Devon Bus Network[13]

7.1.3. Figure 7.1 shows that East Devon has fairly well established bus links between its main towns and Exeter. Cranbrook and Exmouth are linked to Exeter by high-frequency routes 4 and 57, respectively, whilst there are also services operating at least hourly from Exeter to Exeter Airport (route 4A), Honiton via Ottery St Mary (44/44A), Honiton via Sidmouth (9) and Seaton via Sidmouth (9A). Axminster is served by the two-hourly service 44A to Exeter, as well as an hourly link to Lyme Regis, Bridport and Weymouth on routes X51/X53. There is also an approximately hourly service between Exmouth and Sidmouth (157).

7.1.4. Three of the larger towns in East Devon (Exmouth, Honiton and Seaton) have town services, connecting residential areas to the town centre. The district's more rural areas including also have a network of routes but are served at a lower frequency, as

[12]National Bus Strategy - Devon's Response - Travel Devon
[13]Devon Public Transport Map (cartogold.co.uk)

shown in Figure 7.2

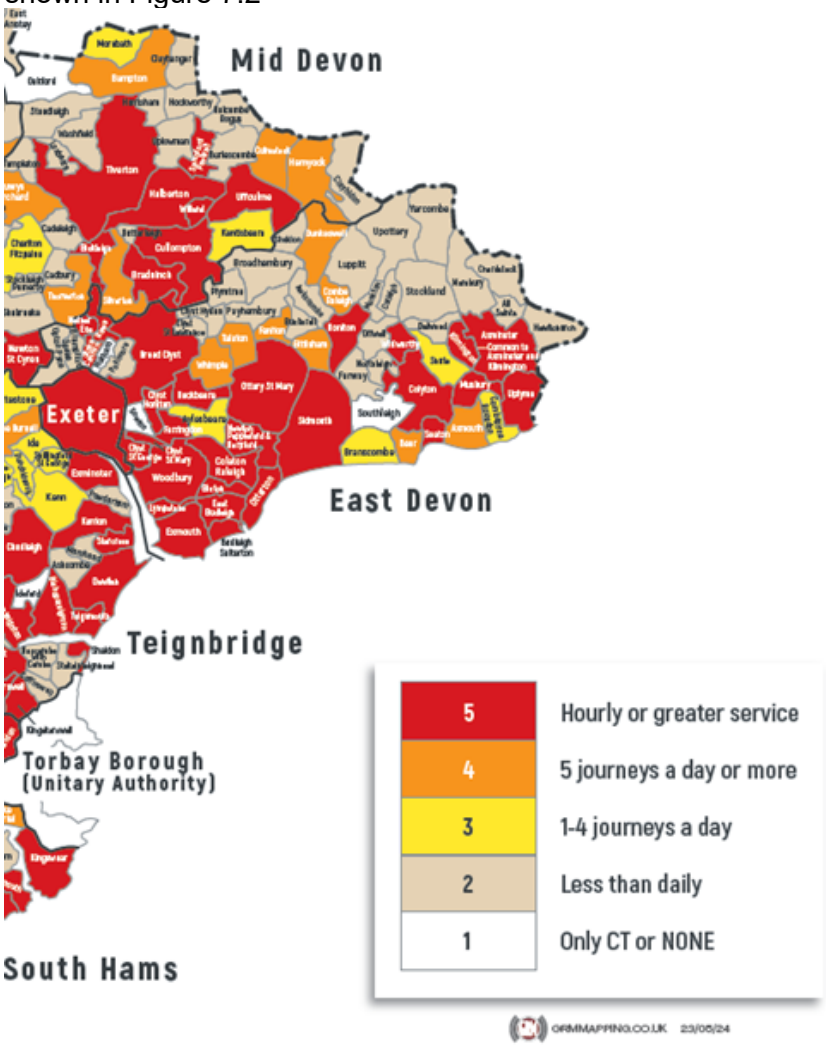


Figure 7.2 Service frequency by parish (June 2024)

7.2. Bus Patronage

7.2.1. Figure 7.3, 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.

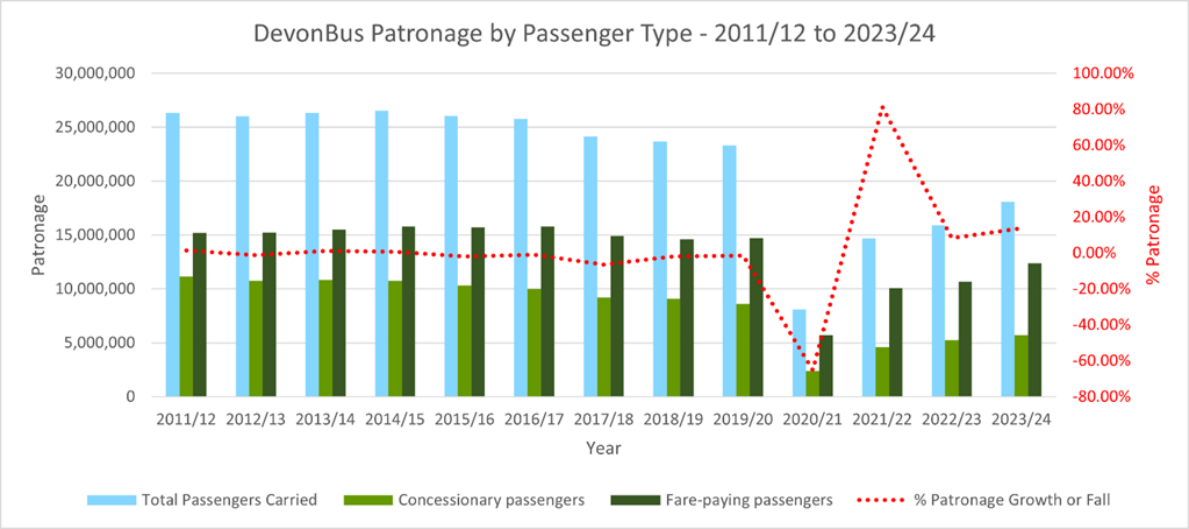


Figure 7.3 BSIP Patronage by Passenger Type[12]

7.2.2. It should be noted that these overall figures do hide variation across the county. For example growth in services attached to new housing developments, such as Cranbrook, hide declines elsewhere in the county. Services are strong in areas of high population and population growth, but there is an underlying tendency for weak-rural services to keep declining.

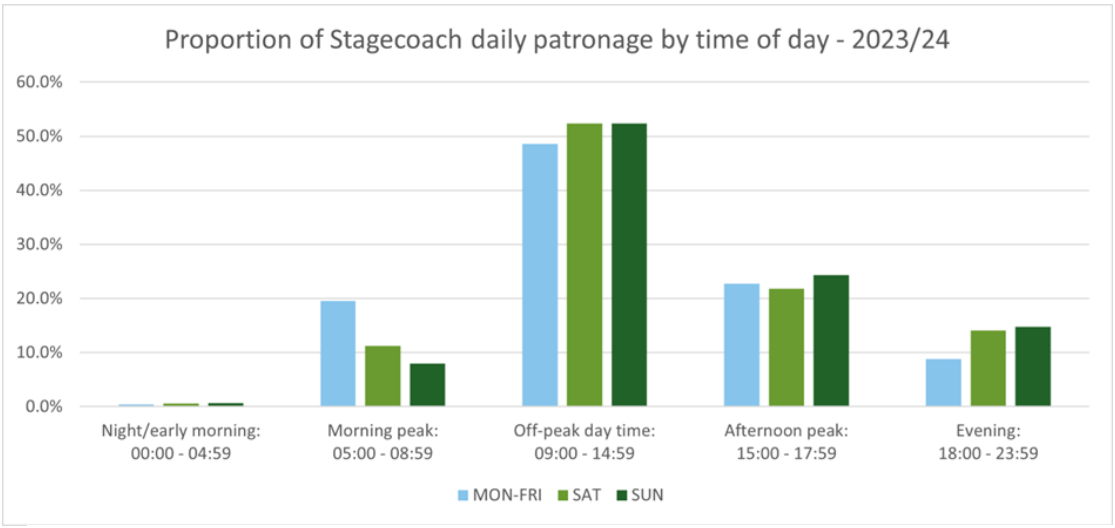


Figure 7.4 Stagecoach SW patronage across the day[12]

7.2.3. 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. As shown in Figure 7.4, 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).

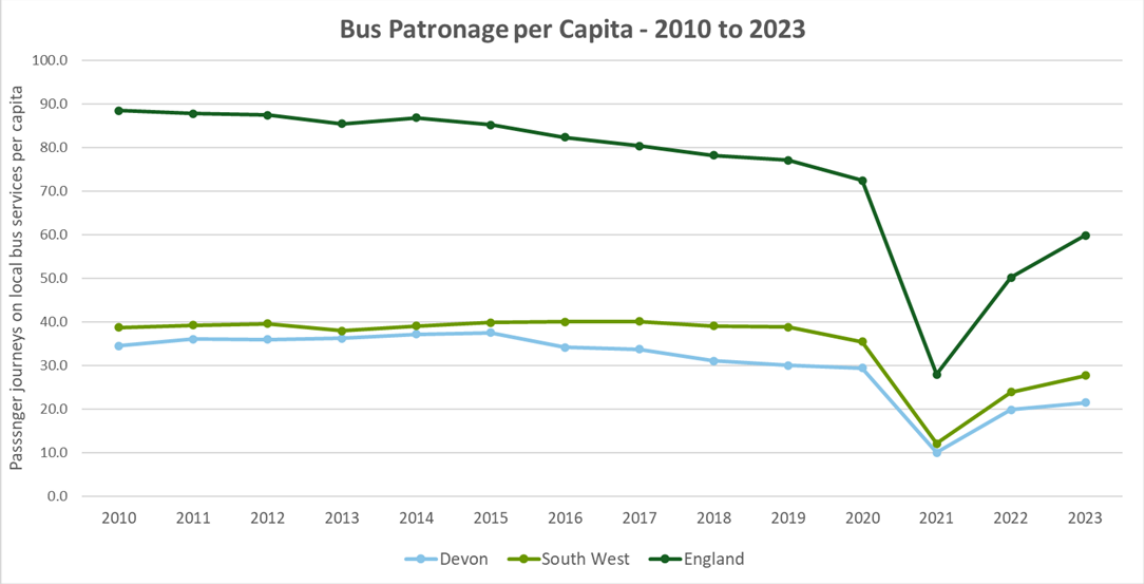


Figure 7.5 Bus patronage per capita[12]

7.2.4. Figure 7.5 shows that Devon bus patronage per capita declined from 37 trips per annum in 2014/15 to and 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 3 showed that between 2011 and 2021, the use of bus services for commuting across East Devon had declined. The magnitude of bus trips had significantly decreased, however the modal share had only marginally decreased from 3% to 2% 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 Cranbrook (4.2%), followed by Exmouth (2.7%). Given that bus coverage is generally focussed on urban areas, it is not surprising that bus use is most popular in the area which draws most strongly to Exeter.

MSOA zone	Bus TTW Mode Split (2011)	Bus TTW Mode Split (2021)
East Devon	2.6%	1.7%
Exmouth	3.9%	2.7%
Sidmouth	2.9%	1.3%
Honiton	1.4%	1.2%
Axminster	1.5%	0.9%
Cranbrook	-	4.2%
Seaton	3.6%	1.5%
Budleigh Salterton	2.2%	1.5%
Ottery St. Mary	1.7%	1.1%
Colyton	1.3%	0.5%
Rural	2.1%	1.4%

Table 7.1: Bus Mode Splits for MSOA zones in East Devon (2011 and 2021)

7.3.3. Bus modal split across the district aligns fairly well with the level of access and frequency of bus services across the district, shown in Figure 7.1 and Figure 7.2. In urban areas around Exmouth, alongside Honiton and Seaton, the bus modal share is greater. In rural areas of the district where services are less frequent, buses are used for less than 1% of all commuting trips made.

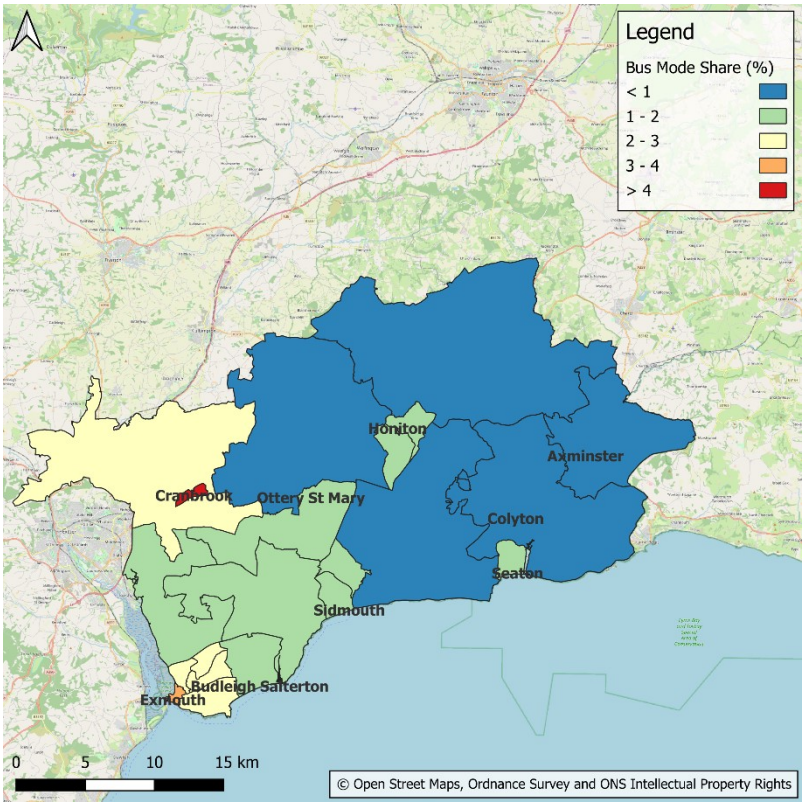


Figure 7.6: Bus TTW Mode Split across East Devon (2021)

8. Public Transport – Rail

8.1. Greater Exeter Rail Network

8.1.1. Two train lines run through East Devon; the Avocet Line running from Exeter through to Exmouth along the eastern edge of the Exe Estuary, and the West of England line running from Exeter through the centre of the district towards Salisbury and ultimately London Waterloo. A third line, the Bristol-Exeter line, technically runs through the district's northwestern corner however there are no stations on this line within the district boundary.

8.1.2. The rail network for the region is shown below in Figure 8.1. Within the district, there are 9 train stations; Exton, Lympstone Commando, Lympstone Village and Exmouth on the Avocet Line, and Cranbrook, Whimple, Feniton, Honiton and Axminster on the West of England line.

8.1.3. A nominal 1km catchment around each rail station, reflecting an approximately 10-minute walk, is shown in Figure 8.2 below. Exeter St David's rail station has been included in Figure 8.2 as it is the nearest station to many parts of East Devon served by long distance services to Plymouth and Penzance in the south and major destinations (Bristol, Birmingham, Edinburgh) in the north.

[14]

Figure 8.1: Devon Railway Network

[14] https://www.traveldevon.info/train/devons-rail-network/

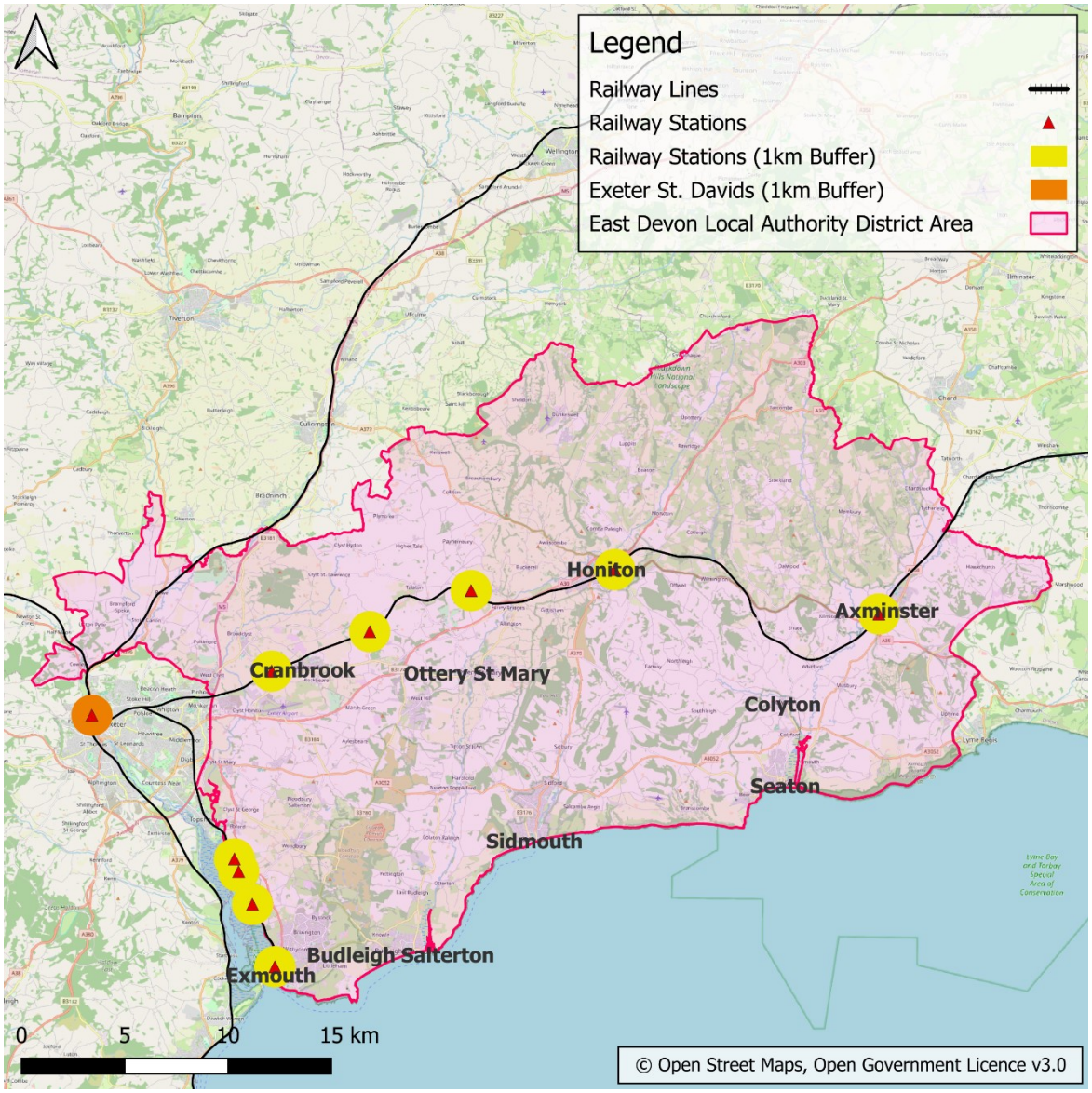


Figure 8.2: East Devon rail stations

8.2. Rail Patronage

8.2.1. The Avocet and West of England lines run through East Devon and serve the nine train stations in the district. Figure 8.3 sets out the patronage of these rail stations, and how usage has changed over the last 10 years. The percentage change has been calculated based on 2023/24 figures.

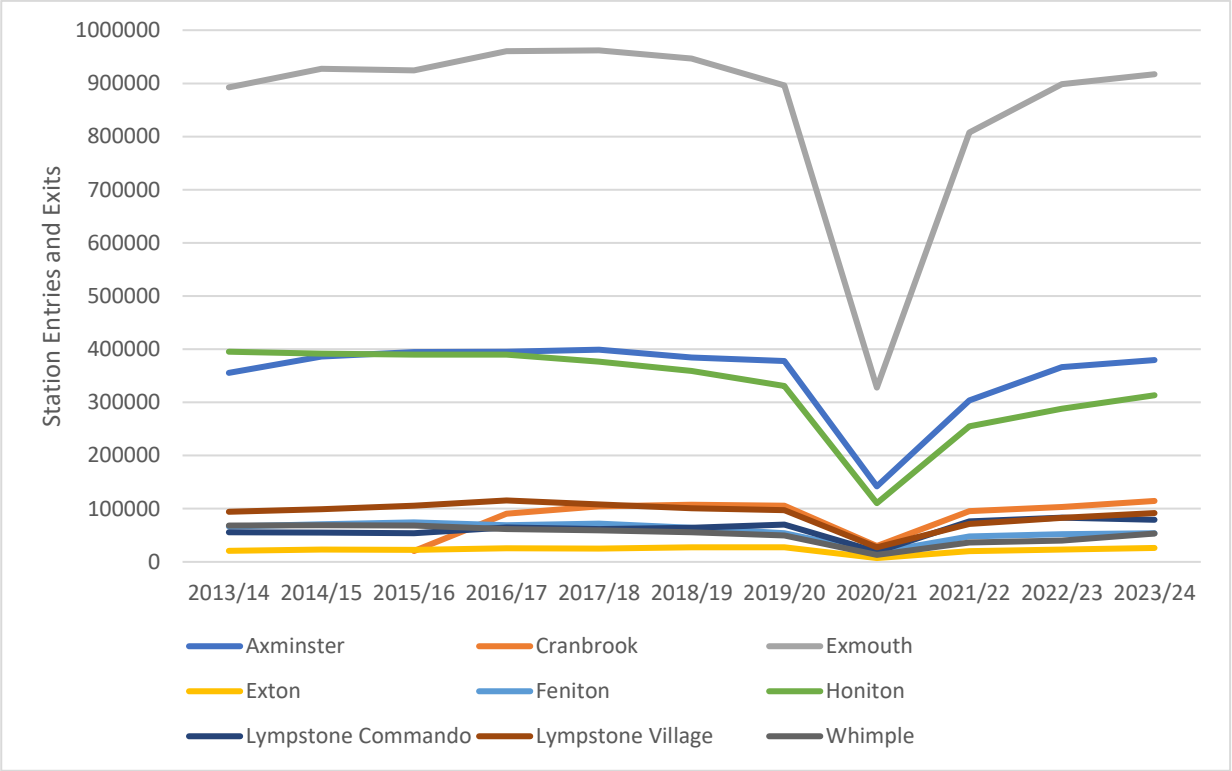


Figure 8.3 10 year change in East Devon station entries and and exits

8.2.2. Figure 8.3 identifies a mixture of usage trends across East Devon between 2013 and 2023, ranging from a 23% decrease at Whimple to a 41% increase at Lympstone Commando.

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 pre-pandemic levels in 2019/20 yet Feniton (-19%), Honiton (-21%) and Whimple (-23%) remain significantly decreased compared to their patronage 10 years prior. These changes, however, may also be linked to a change in service patterns with the opening of Cranbrook station in late 2015.

8.2.4. The overall change is a marginal 4% increase in usage, from 1.9 million passengers in 2013 to 2.0 million in 2023. The bulk of this increase in passenger numbers may be linked to the opening of the Cranbrook station, which had a usage figure of approximately 115,000 in 2023/24. There was an overall 5-year decrease of 4% between 2018/19 and 2023/24 as patronage peaked prior to the pandemic, however this was less than the national average reduction of 8%, indicating a stronger recovery from the pandemic in East Devon.

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.

8.3. Travel to Work Data

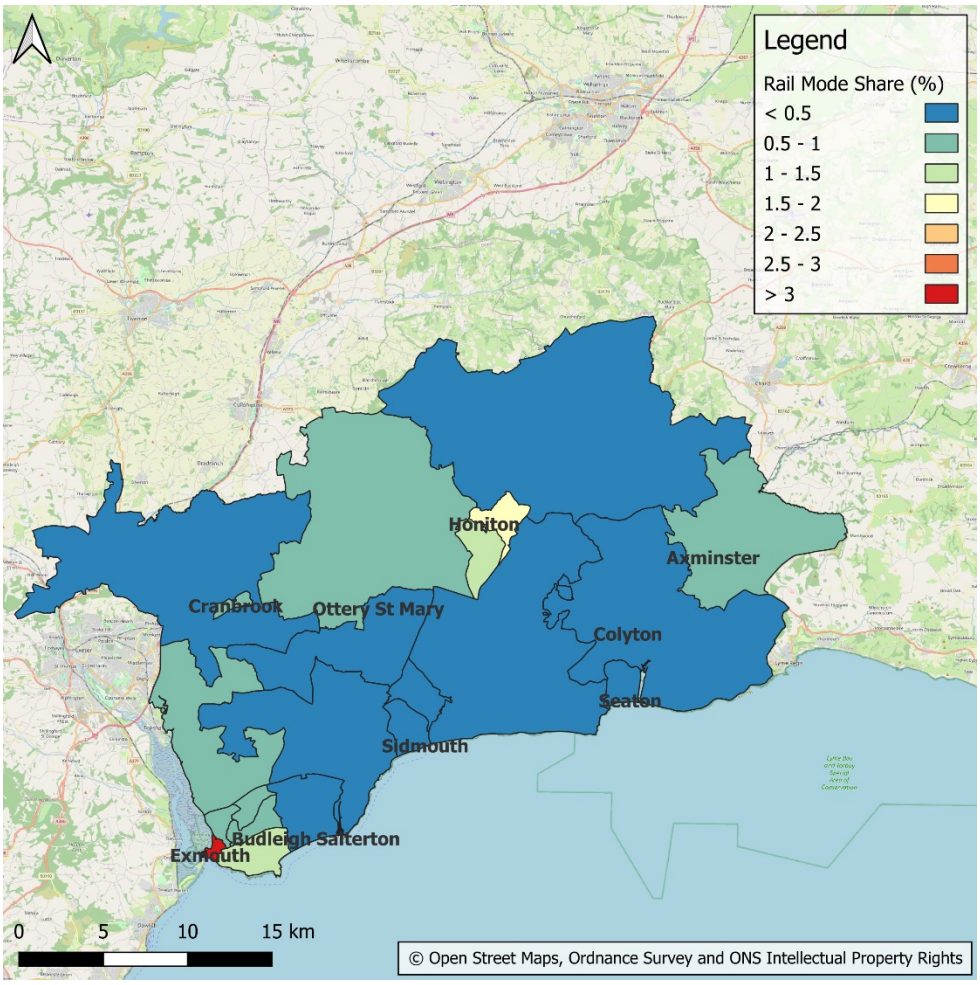


Figure 8.4 Rail Travel to Work mode share across East Devon

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

8.3.2. The mapping helps to emphasis the hot spots of rail usage. It also highlights that there is variable use across the area; with almost no train use in the central south, southeastern and northeastern portions of the district due to a lack of any rail stations in this area.

8.3.3. It is clear from this map that the areas with the highest TTW mode split by train is the central area in Exmouth, followed by Honiton. Beyond this, the rail modal split is relatively small in areas such as Axminster. The relative size of the Axminster MSOA

may be misleading in showing the relative uptake of rail as a commuting method in comparison with the central Exmouth MSOA.

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 East Devon stations) is presented in the 2015 Network Rail Western Route Study. In particular, 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 East Devon into Exeter by train were projected to experience significant crowding, particularly during the latter parts of their journey.

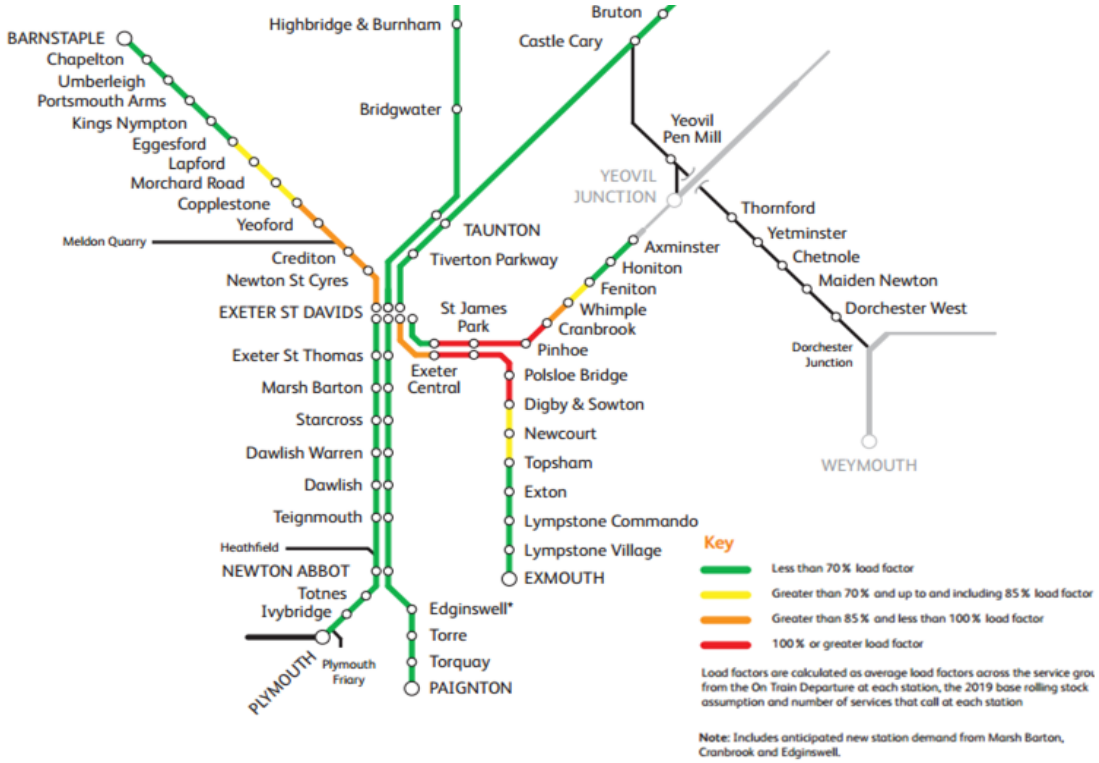


Figure 8.5: Estimated 2023 Load Factor from the 2015 Western Route Study on services arriving into Exeter St David's in AM peak

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 East Devon 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 84% (49,662 households) in 2011, to 86% (57,724 households) in 2021.

9.2.2. There are slight variations in car ownership across the district; in Exmouth only 81% of households had access to a car in 2021, while in Cranbrook this was greater at 96%.

Percentage of households with access to a car		
	2011	**2021**
Exmouth	79%	81%
Sidmouth	82%	84%
Honiton	80%	82%
Axminster	83%	86%
Cranbrook	-	94%
Seaton	79%	82%
Budleigh Salterton	84%	87%
Ottery St. Mary	90%	89%
Colyton	90%	91%
Rural	92%	93%
East Devon	**84%**	**86%**

Table 9.1: Percentage of households with access to a car

9.2.3. Across East Devon, in 2021 42% of households had access to one car/van, 32% had access to two cars/vans, and 12% 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 over this period, by approximately 0.10 cars per household.

Estimated average number of cars per household		
	2011	**2021**
Exmouth	1.18	1.28
Sidmouth	1.24	1.34

Honiton	1.18	1.26
Axminster	1.29	1.41
Cranbrook	-	1.50
Seaton	1.11	1.22
Budleigh Salterton	1.26	1.38
Ottery St. Mary	1.50	1.57
Colyton	1.50	1.58
Rural	1.60	1.68
East Devon	**1.33**	**1.43**

Table 9.2: Estimated average number of cars per household in East Devon

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 that it was in 2019 (by 7%). Throughout this period, the population rose steadily, experiencing a 7% increase between 2013 and 2023.

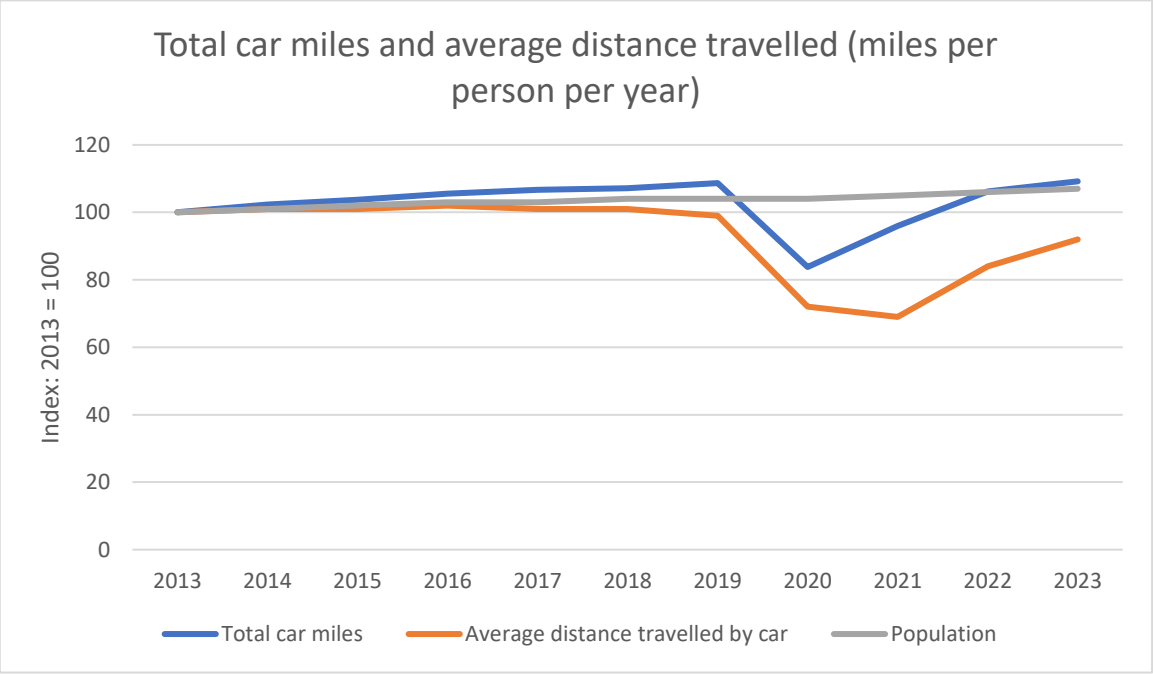


Figure 9.1: Total car miles, average distance travelled and population 2013 – 2023, indexed to 2013 (DfT: Road use statistics)

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 Transport[15]. The M5 motorway runs along the western edge of East Devon, and the A30 runs across the centre of the district between Honiton and Exeter. On the eastern side of the district, the strategic A35 runs between Honiton and Axminster.

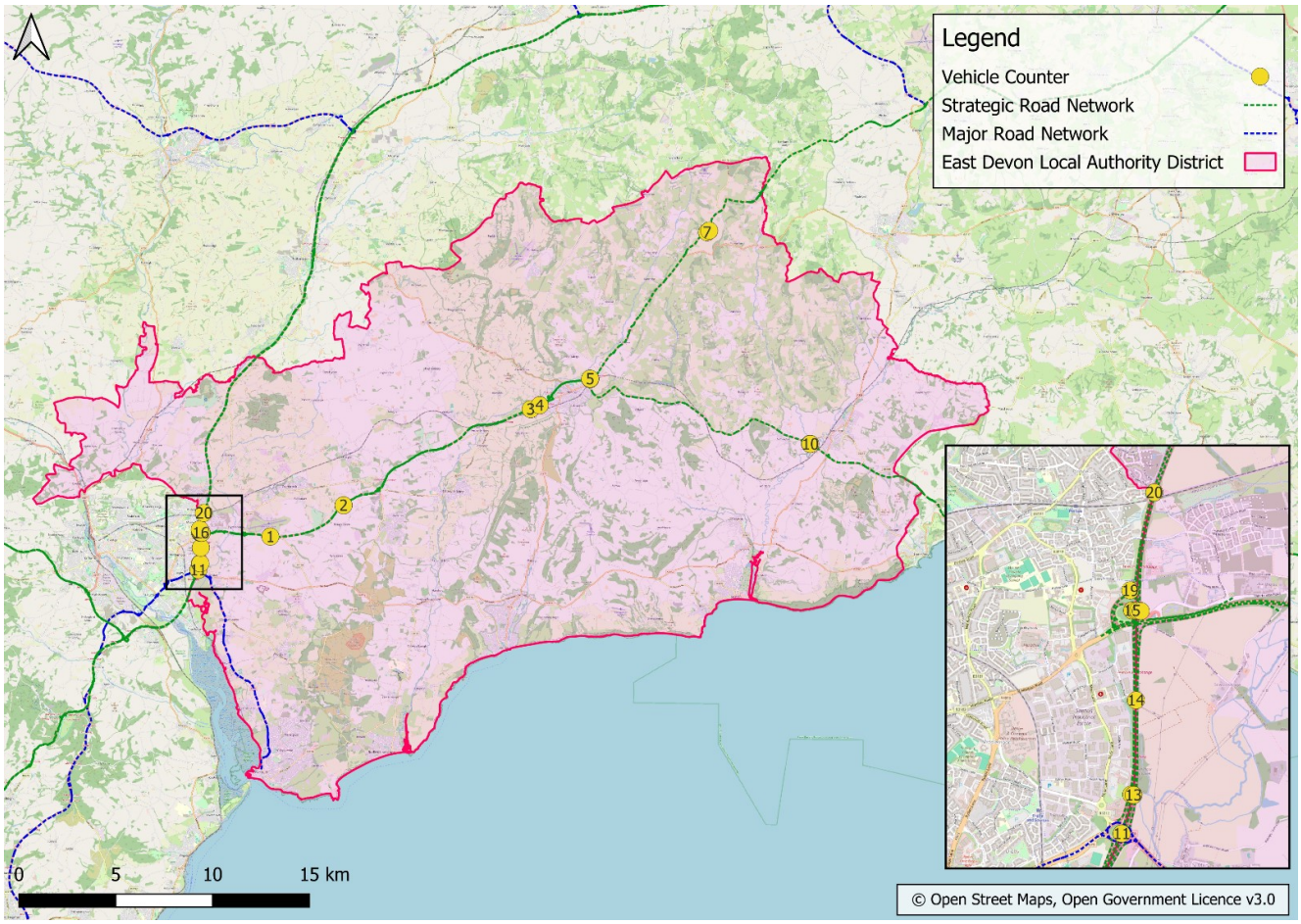


Figure 9.2: Location of Department for Transport Strategic Road Network Vehicle Counters

[15] Map Road traffic statistics - Road traffic statistics (dft.gov.uk)

Site No.	Site Name	Site Location	AADT			Annual Change	Total Change
			2015	2019	2024		
1	5072/1	A30 EB Exeter Airport - Daisymount (Ottery)	15118	16752	16490	1.0%	9%
2	5073/1	A30 WB Exeter Airport - Daisymount (Ottery)	15895	17274	16858	0.7%	6%
3	5075/1	A30 WB Iron Bridge (Feniton) - Turks Head (Honiton)	16357	18321	17728	0.9%	8%
4	5074/1	A30 EB Iron Bridge (Feniton) - Turks Head (Honiton)	15520	17597	-	3.3%	13%
5	5077/1	A30 EB Langford (Honiton) off-slip	5973	6249	6092	0.2%	2%
6	5077/2	A30 EB Langford (Honiton) mainline	6944	7910	7837	1.4%	13%
7	30360118	A303 WB Newcott (Brightside Roadside Dining)	7473	8460	-	3.3%	13%
8	30360119	A303 EB Newcott (Brightside Roadside Dining)	7185	8186	-	3.5%	14%
9	5078/1	A35 WB Yarty Bridge - Abbey Gate (Axminster)	5435	5716	-	1.3%	5%
10	5078/2	A35 EB Yarty Bridge - Abbey Gate (Axminster)	5216	5556	-	1.6%	7%
11	5064/1	M5 NB J30 (Sandygate) mainline	29125	32031	31975	1.1%	10%
12	5065/1	M5 SB J30 (Sandygate) off-slip	11420	13035	13270	1.8%	16%
13	5065/2	M5 SB J30 (Sandygate) mainline	28560	31440	*31220**	*1.0%*	*9%*
14	30360129	M5 SB J29 (Sowton) - J30 (Sandygate)	41524	41805	-	0.2%	1%
15	5066/1	M5 NB J29 (Sowton) off-slip	14230	14230	17398	2.5%	22%
16	5066/2	M5 NB J29 (Sowton) mainline	26269	27386	27246	0.4%	4%
17	5067/2	M5 SB J29 (Sowton) mainline	23650	26625	-	3.1%	13%
18	5067/1	M5 SB J29 (Sowton) off-slip	5973	6789	-	3.4%	14%
19	30360163	M5 NB J29 (Sowton) on-slip	5325	6090	-	3.6%	14%
20	30360127	M5 SB J28 (Cullompton) - J29 (Sowton)	31242	32991	-	1.4%	6%
* No 2024 data available. 2023 data used as 2024 value.							

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 East Devon were on the M5, with over 40,000 vehicles per day recorded on the southbound carriageway between J29 (Sowton) and J30 (Sandygate). On the A30, A35 and A303, flows were significantly lower, ranging from around 18,000 vehicles per day on the A30 wesbound between Honiton and Feniton, to around 6,000 vehicles per day in each direction on the A35 near Axminster.

9.3.3. The general trend from the data collected shows an increase in flows over the period 2015 - 2024. The largest increase (22%) was recorded at the M5 J29 northbound off-slip, whilst the smallest increase (2%) was at the A30 Langford eastbound off-slip. However, it should be noted that many sites saw a negligible change or slight decrease in flows between 2019 and 2024.

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).

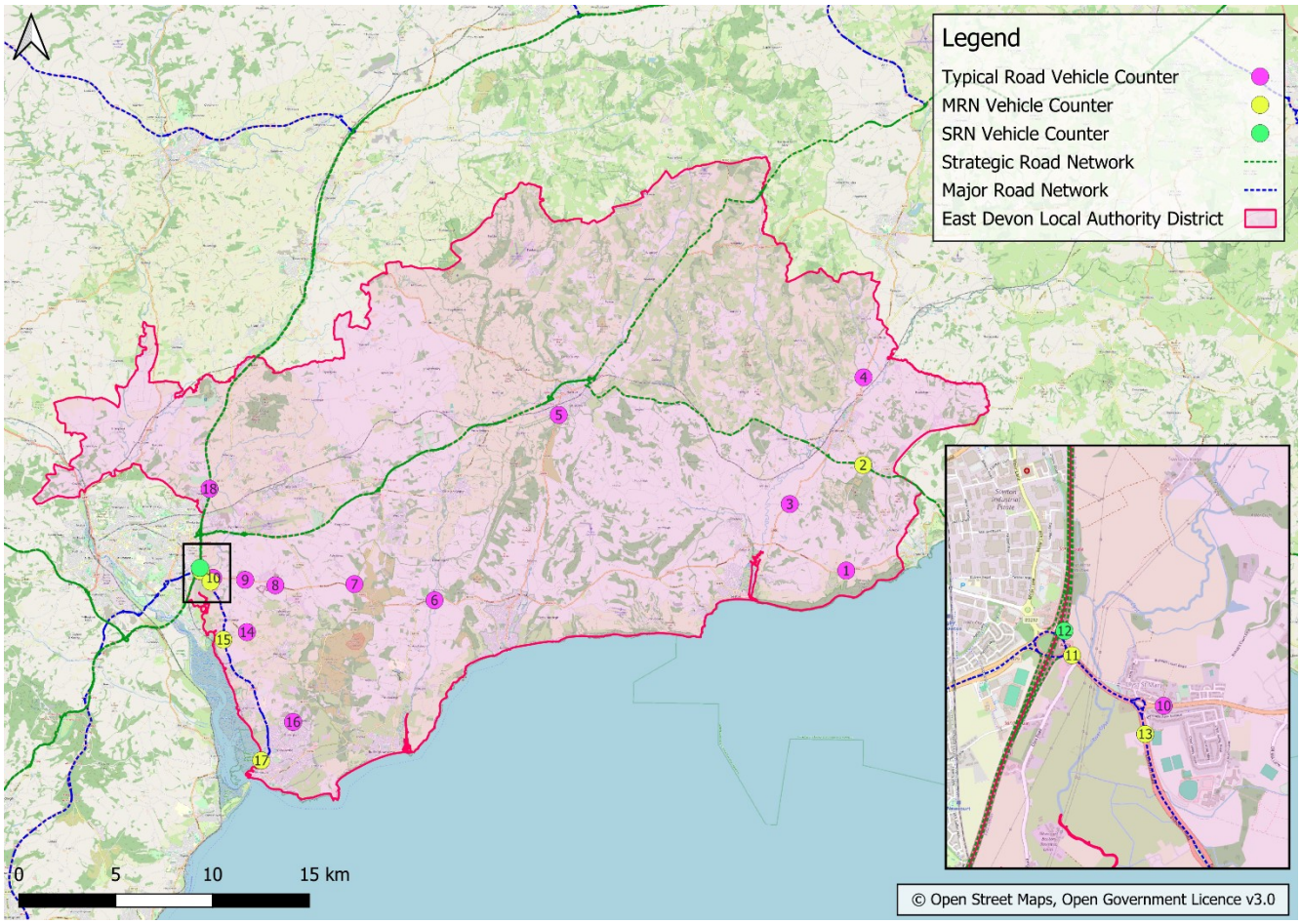


Figure 9.3: Location of Devon County Council's ATC sites

		AADT				
Site No.	**Site Name**	**2014**	**2019**	**2024**	**Annual Change**	**Total change**
1	A3052 East of Rousdon	*3,650*[1]	3,651	3,403	*-0.7%*	*-7.3%*
2	**A35 Axminster Bypass**	**18,105**	**19,680**	***19,002***[2]	***0.5%***	***4.7%***
3	A358 Centre of Musbury	*6,398*[1]	6,830	6,889	*0.7%*	*7.1%*
4	A358 North of Axminster	*6,781*[1]	7,504	*7,259*[3]	*0.8%*	*6.6%*
5	A375 South of Honiton		6,676	6,883	0.5%	3.0%
6	A3052 East of Newton Poppleford		13,010	*12,098*[2]	*-1.5%*	*-7.5%*
7	B3180 Halfway House Inn (SB only)	*2,467*[4]	2,931		*2.3%*	*15.8%*
8	A3052 Farringdon	*10,928*[4]	13,943	*13,227*[2]	*1.6%*	*17.4%*
9	A3052 Cat & Fiddle	14,879	16,856	*16,286*[2]	*0.9%*	*8.6%*
10	A3052 Clyst St Mary	17,391	19,499	18,531	0.6%	6.2%
11	**A376 Sandygate Farm**	**41,406**	**43,156**	**44,220**	**0.6%**	**6.4%**
12	**M5 J30 Southbound Offslip**	***11,704***[5]	**13,176**	***13,237***[2]	***0.9%***	***11.6%***
13	**A376 Clyst St Mary**	**24,804**	**27,157**	**24,743**	**0.0%**	**-0.2%**
14	B3179 Woodbury Road	8,238		*8,826*[2]	*0.7%*	*6.7%*
15	**A376 Ebford**	**19,100**	**20,402**	**18,810**	**-0.1%**	**-1.5%**
16	Dinan Way	7,164	7,336	6,958	-0.3%	-3.0%
17	**A376 Marine Way**	**11,873**	**12,466**	**12,176**	**0.2%**	**2.5%**
18	B3181 South of Broadclyst	7,626	8,395	*7,710*[2]	*0.1%*	*1.1%*

[1] No 2014 data available. 2015 used as 2014 value.
[2] No 2024 data available. 2023 used as 2024 value.
[3] No 2024 data available. 2022 used as 2024 value.
[4] No 2014 data available. 2013 used as 2014 value.
[5] No 2014 data available. 2011 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 East Devon 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 western edges of East Devon, most notably on the A376 at Sandygate, where an AADT of over 44,000 was recorded in 2024. Heading further east, AADTs were considerably lower, reducing to just 3,400 on the A3052 East of Rousdon (near the Dorset border).

9.4.4. Traffic flows on roads within East Devon have generally been marginally increasing over the 10-year period. In most cases, this increase is between 0% and 1% per year. A notably larger increase can be found at B3180 Halfway House Inn (15.8% over 6 years) and the A3052 at Farringdon (17.4% over 10 years). Conversely, a notable decrease can be observed on the A3052 East of Rousdon where there has been a total 7.3% decrease in traffic volumes from 2015 to 2024.

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 9.4 (for simplicity, only one counter per corridor is included).

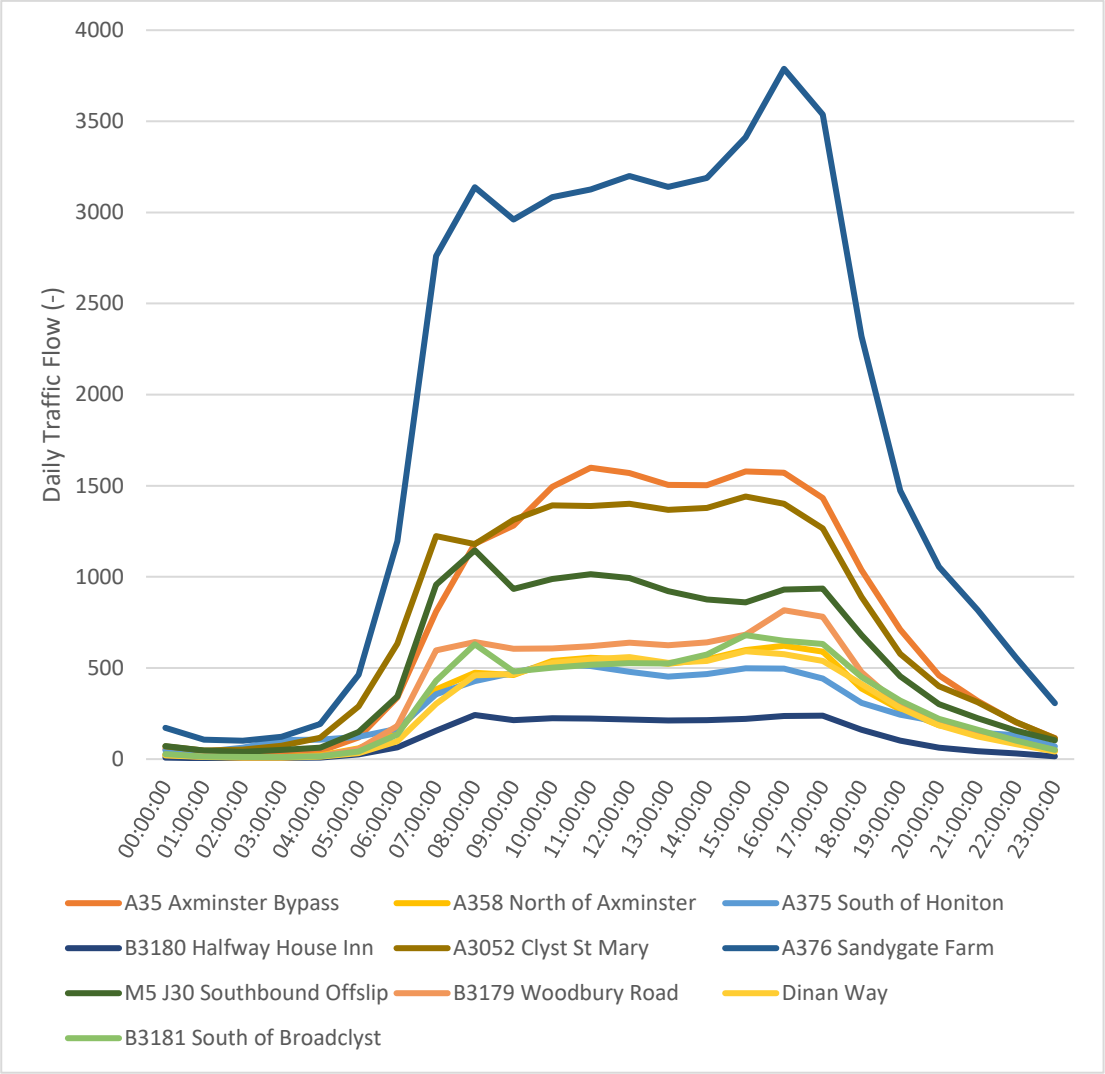


Figure 9.4: Daily ATC traffic profiles

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.

10. Collision Data

10.1. Introduction

10.1.1. The following section summarises the key trends in road traffic collisions and casualties across East Devon over the last 5 years, from 2019 to 2023.

10.1.2. This includes the trends in accident numbers, a comparison of accident rates against other areas in Devon, seasonality, and mapping of routes in the area by accident performance.

10.1.3. Further information can be found on Devon County Council's Road Safety Collision Data webpage, https://www.devon.gov.uk/roads-and-transport/safe-travel/road-safety/collision-data/.

10.2. 5 Year Accident History

Total Casualties

10.2.1. The annual number of road traffic casualties between 2019 and 2023 is shown in Figure 10.1 below.

10.2.2. In the most recent year for which validated data is available (2023), there were 1,567 road casualties recorded by the police across Devon, of which 266 were in East Devon. This compares to 2,163 and 401 in Devon and East Devon, respectively, in 2019.

10.2.3. The data indicates that between 2019 and 2020, total road traffic casualties decreased significantly (by around 25-30%) across both East Devon and Devon. This is attributable to a significant decrease in traffic during the COVID-19 pandemic, however subsequently road traffic casualties have remained largely flat, despite an increase in traffic flows.

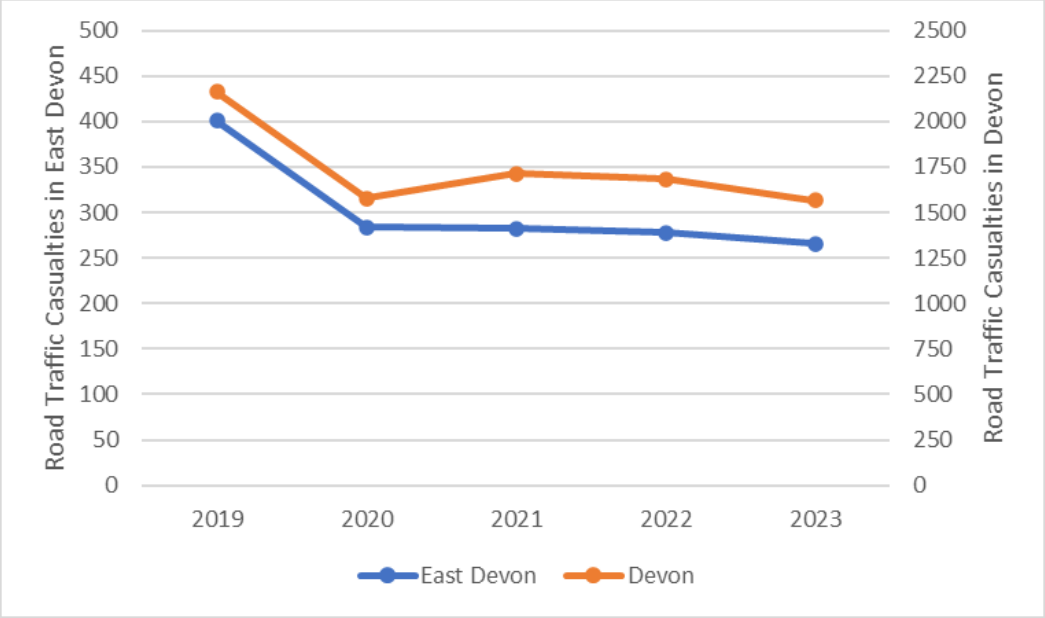


Figure 10.1 Annual Number of Road Traffic Casualties 2019 - 2023, Devon and East Devon

Fatalities and Serious Injuries

10.2.4. The total number of Killed and Seriously Injured (KSI) casualties across East Devon, compared against Devon, are shown in Figure 10.2.

10.2.5. In 2023, 329 KSIs were recorded across Devon, of which 21 were fatalities. In East Devon, 60 KSIs were recorded, of which 7 were fatalities.

10.2.6. The numbers of KSIs remained relatively stable throughout this time period for both Devon and East Devon. Both experienced a reduction between 2019 and 2020, however this was less significant than for total casualties. Subsequently the number of KSIs has fluctuated from year to year, peaking at 356 (for Devon) and 67 (for East Devon) in 2022.

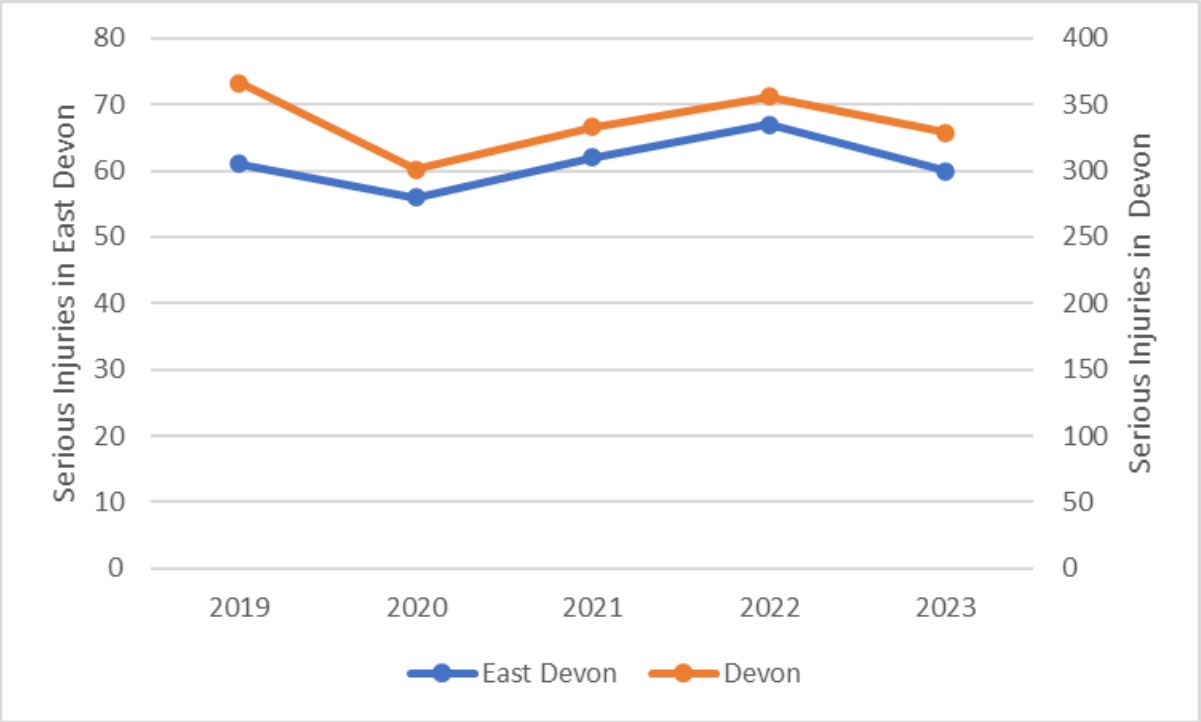


Figure 10.2 Annual number of fatalities and serious injuries resulting from Road Traffic Collisions

10.3. Breakdown of Fatalities and Serious Injuries by Mode

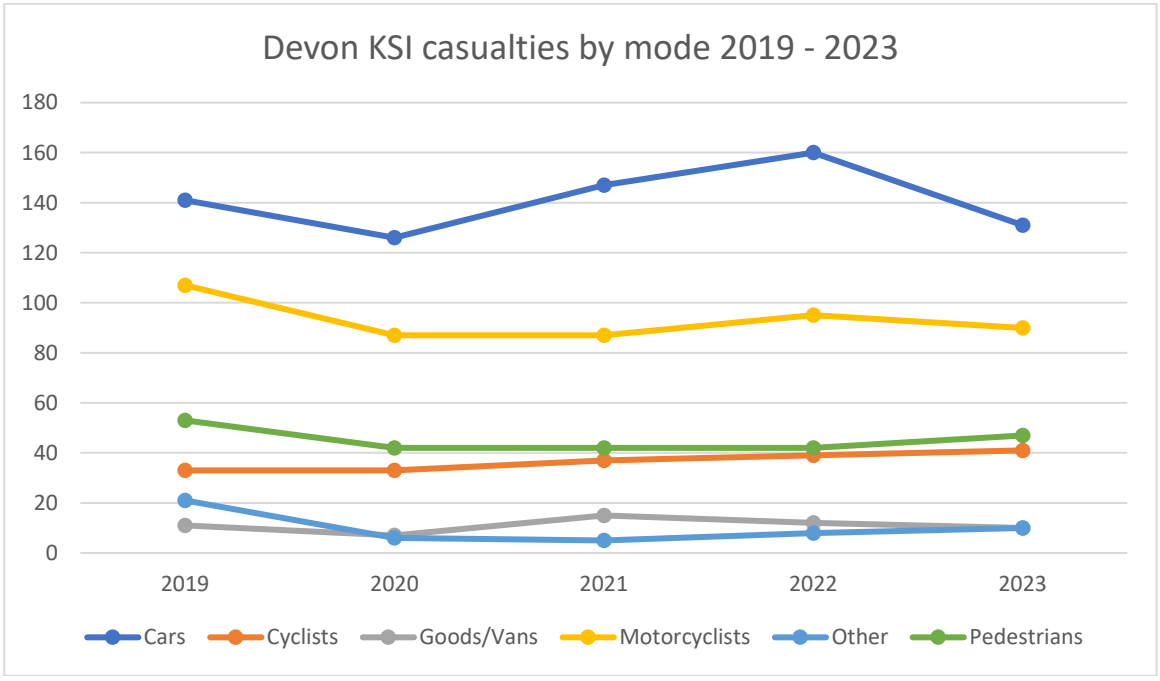
10.3.1. Figure 10.3 below shows the 5-year history of KSI (killed or seriously injured) accidents, by mode for both Devon and the East Devon area. In East Devon, reflecting that the overall number of KSI casualties for each mode is relatively low, these numbers tends to be highly variable from one year to the next.

10.3.2. The graphs show that within Devon, the number of KSI casualties stayed roughly consistent over time across all modes.

10.3.3. However, within East Devon, there was a notable decrease in the number of cyclist KSI casualties, from 12 in 2019 to 2 in 2023. Conversely, the number of pedestrian

KSI casualties per year doubled across the period studied, from 5 in 2019 to 10 in 2023.

10.3.4. For all years studied, the mode with the greatest number of casualties was cars, typically comprising around 50% of all KSI casualties. However, in both 2019 and 2023, the number of motorcyclist KSI casualties was only marginally lower, reflecting a significantly higher rate of death or serious injury among motorcyclists than among car users, given that motorcycles make up a much smaller proportion of overall traffic.



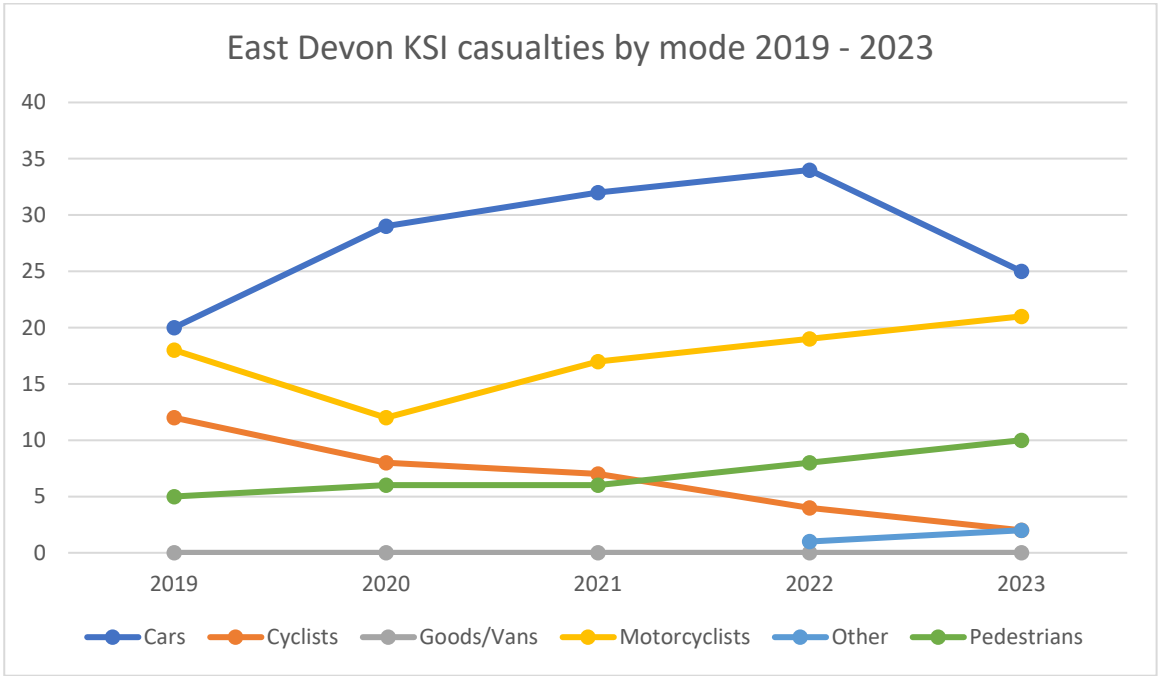


Figure 10.3 Annual Number of KSI casualties by mode, Devon and East Devon

10.4. Accident 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 this seasonality, data for East Devon is provided below in Figure 10.4 sets out the number of collisions and killed or seriously injured (KSI) incidents each month, in total from, 2019 to 2023.

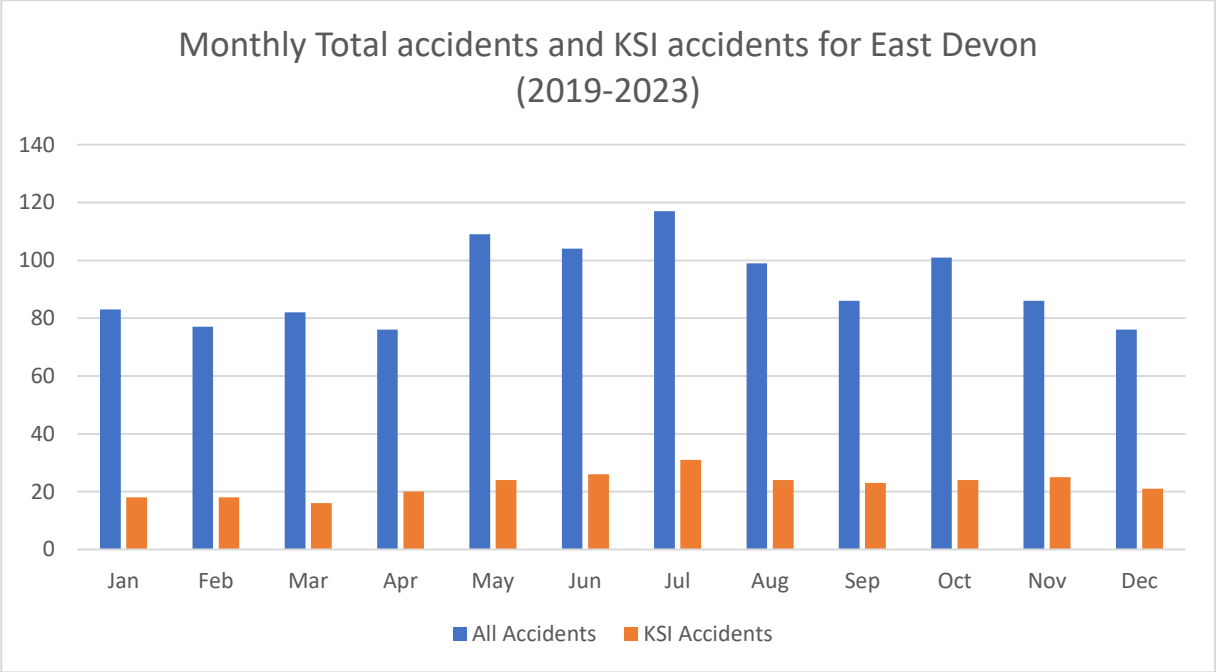


Figure 10.4 Monthly Total accidents and KSI accidents for East Devon (2019-2023)

10.4.3. For all collisions in East Devon between 2019 and 2023, 22% occurred in winter, 24% in spring, 29% in summer, and 25% in autumn. The share of seasonality for KSIs followed a similar pattern, with 21% occurring in winter, 22% in spring, 30% in summer, and 27% in autumn.

10.4.4. During the winter months of December, January, and February, on average there were 79 injured people each month, of which 19 were KSIs. However, during the summer months (June, July and August) casualty rates were 35% higher, with an

average of 107 people being injured each month, and KSI rates increase by over 40% to an average of 27 accidents per month.

10.4.5. Although these figures suggest roads are much more dangerous for users in the summer months, it should be noted that this period coincides with the higher number of trips being made by such users during these months.

10.5. Route Analysis

10.5.1. Route-based multi-factor accident analysis is undertaken by Devon County Council to compare the accident performance of all A roads and some B roads across the County.

10.5.2. The route analysis is based on six aspects that feed into an overall score. The County reports this to help provide a more consistent assessment that can be given by a single metric. An overview of the inputs is provided below in Figure 10.5

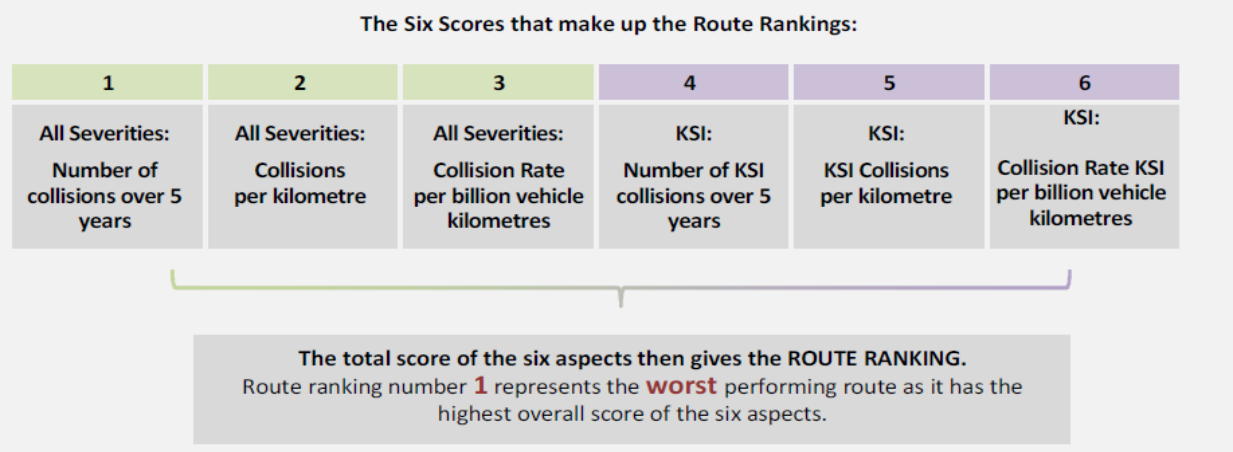


Figure 10.5 Overview of route analysis methodology

10.5.3. This analysis has been refined to the East Devon area to provide a localised route map of the comparative performance of all routes in the East Devon area.

10.5.4. The route analysis rankings by route are shown below in Figure 10.6.

10.5.5. It should be noted that that analysis is primarily based on frequency against vehicle kilometres, and factors such as pedestrian volume (which are rarely counted) are not included. As a result, urban areas, where pedestrians and cyclists are mode prevalent tend to be higher on the list. Equally, this is reflective of the higher number of incidents on these routes.

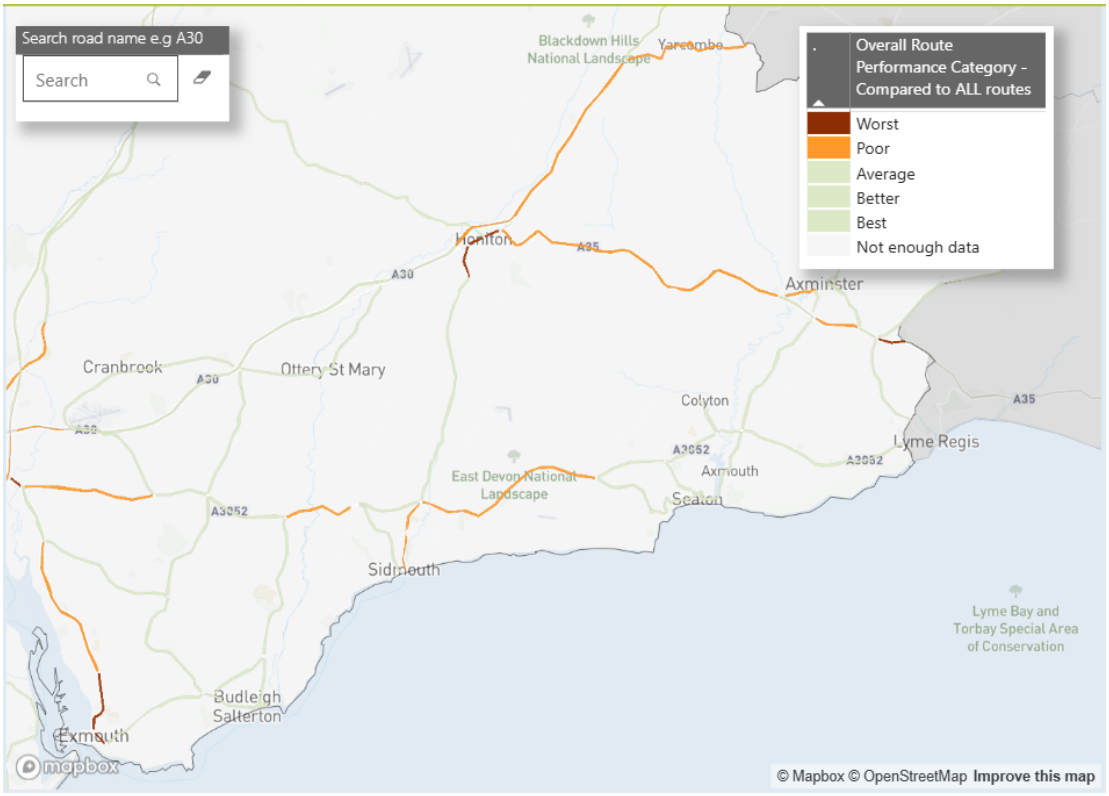


Figure 10.6 Map of East Devon accident analysis

10.5.6. The worst performing routes in the East Devon area are;

- **A376** Exmouth Marks & Spencer Roundabout to Courtlands Cross
- **B3178** Exmouth Strand to Rolle Road Roundabout
- **A375** Honiton Roundball Lane junction to High Street/Exeter Road Roundabout
- **A375** Honiton High Street/Exeter Road Roundabout to A373 Dowell Street junction
- **A375** Honiton A373 Dowell Street junction to A35 Kings Road Roundabout
- **A35** Dorset Boundary to B3165 Hunters Lodge junction
- **A376** Dual Carriageway Link M5 J30 to Clyst St Mary Roundabout

10.5.7. The majority of the worst performing routes in East Devon are located in Honiton and Exmouth, with poor routes along the A35, A375, A376 and B3178.

11. Air Quality

11.1. Background

11.1.1. 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).

11.1.2. Air quality assessments have to be carried out every three years and the areas where objectives are not met, must be declared as Air Quality Management Areas (AQMAs). 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.

11.1.3. East Devon currently has no designated AQMAs.

11.1.4. 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.

11.1.5. 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 NO2.

11.2. NO2 Concentration

11.2.1. East Devon District Council regularly monitor air quality, using diffusion tubes at a range of sites across the district. Table 11.1 below sets out the annual mean concentrations of NO2 in key settlements across the district, in each case using the monitoring site with the highest recorded concentration in 2023.

Table 11.1 NO2 concentration monitoring in East Devon

	NO2 Annual Mean Concentration (µg/m3)				
Location	2019	2020	2021	2022	2023
Exton	34.5	28.2	29.8	26.2	27.6
Exmouth	21.3	16.0	18.1	18.1	17.1
Newton Poppleford	19.3	16.4	16.3	16.5	15.6
Sidmouth	12.2	9.7	9.8	8.9	8.4
Clyst St George	28.3	31.9	33.1	32.2	30.2
Cranbrook	13.3	10.7	9.8	9.8	11.0
Clyst St Mary	30.9	24.9	26.5	23.0	23.9
Axminster	33.0	27.2	28.1	27.9	26.2
Seaton	12.4	10.8	12.5	10.4	9.0
Ottery St Mary	23.4	19.4	19.6	18.3	17.7
Honiton West	30.1	25.1	25.3	25.9	25.5
Honiton East	**41.5**	33.3	35.2	32.3	33.0

11.2.2. Table 11.1 sets out some encouraging trends with annual means typically falling at most monitoring sites. Table 11.1 also demonstrates why no AQMA sites have been designated; there have been no exceedances across the district since 2019 (except for one site in Honiton).

12. Planned Investment

12.1.1. Planned investment in East Devon's transport network is diverse and is featured in key county and district plans and policies. The table below is not exhaustive of all the projects within East Devon, but contains those committed to in the council's key policy documents[16], the Transport Infrastructure Plan (TIP), Local Cycling and Walking Infrastructure Plans (LCWIPs), Bus Service Improvement Plan (BSIP) and Capital Programme.

Investment	Location	Document	Potential benefits
Otter Trail	Feniton / Ottery St Mary / Sidmouth	Countywide LCWIP	Safer and more direct journeys for pedestrians and cyclists. Connections to Feniton Railway station and NCN2.
Sidbury to Sidford Multi-Use Trail (MUT)	Sidbury / Sidford	Countywide LCWIP	Safer and more direct journeys for pedestrians and cyclists. Access to natural environment between the settlements.
Beer to Axminster and Uplyme MUT	Beer / Axminster / Seaton	Countywide LCWIP	Extend the NCN. Safer and more direct journeys for pedestrians and cyclists. Connect key towns and tourist destinations.
Boniface Trail	Exeter / Cowley / Newton St Cyres / Crediton	Countywide LCWIP	Active travel route connecting Crediton and Exeter, allowing potential better low-carbon access to villages in northwestern East Devon
Clyst Valley Trail	Westclyst / Clyst Honiton / Clyst St Mary / Topsham	Clyst Valley and new communities LCWIP	Active travel access from Exeter to Clyst Valley Regional Park. Commuter route along Clyst Valley and to Exeter, Cranbrook and the East Devon Enterprise Zone.
Killerton and Broadclyst MUT	Broadclyst	Clyst Valley and new communities LCWIP	Access to Killerton Estate for leisure. Safer crossing of B3181. Potentially connect Cranbrook station to Broadclyst
Cranbrook active travel routes	Cranbrook	Clyst Valley and new communities LCWIP	Improved connections to Cranbrook station. Honiton Road / London road improvements for active travel.
East Devon New Settlement Active Travel Routes	East Devon New Settlement	Clyst Valley and new communities LCWIP	Creating routes within and around the new settlement site east of Exeter

[16] Transport planning - Roads and transport (devon.gov.uk)

9/9A Exeter – Sidmouth Bus route	Sidmouth / Exeter	BSIP	Increase frequency to 20-minutes, improving connectivity on key commuter route.
Exeter Central (Heavitree Road) and Eastern (Pinhoe Road) Corridors	Exeter / Cranbrook	BSIP	Significant investment to reduce bus journey times on corridors used by services linking Exeter and East Devon, including routes 4 (Cranbrook – Exeter) and 9/9A (Honiton/Seaton – Sidmouth – Exeter)
Zero Emission Bus Regional Areas (ZEBRA)	Exeter / Cranbrook	BSIP	Funding for zero emission buses in the Exeter area, including on the Exeter-Cranbrook route (4)
Cranbrook to City Centre bus priority	Exeter / Cranbrook	TIP	Bus priority measures including signal upgrades, bus lanes and bus only access to improve social opportunities
Cranbrook Cycle Link	Exeter / Cranbrook	TIP	Multi-use trail linking Cranbrook to Exeter
Clyst St Mary roundabout	Clyst St Mary	TIP	Alterations/improvements to roundabout (A3052/A376 junction) to improve safety and capacity
Avocet line improvements	Exmouth	TIP	Extension of platforms along the Avocet line
West of England line (Exeter – Axminster) improvements	Cranbrook / Whimple / Feniton / Honiton / Axminster	TIP	Additional passing loop(s) on the West of England line to increase diversionary capacity and service frequency
Dinan Way Extension	Exmouth	Capital Programme	Completion of Dinan Way to the A376 (currently onsite)
Station Road Footway Improvements	Broadclyst	Capital Programme	Provision of a section of footway/cycleway, linking to Clyst Vale Community College
Stoney Lane	Axminster	Capital Programme	Pinchpoint removal, widening road to enable two-way traffic flow
Lyme Road	Uplyme	Capital Programme	Delivery of a section of footway between Crogg Lane and Barnes Meadow

13. Summary

Travel to Work Data

13.1.1. The travel to work data utilised in this report is made up of census data grouped into MSOA-based areas. The data shows that the employed population of East Devon increased between 2011 and 2021, experiencing an 11% increase to 66,728. Across East Devon, 14% of those in employment commute to a location within the MSOA in which they reside, and 30% commute to elsewhere in East Devon, according to the 2011 census. Exeter is the key commuting destination for East Devon residents, with some 20% of workers residing in East Devon working in Exeter, followed by Sidmouth in the south-east of the district.

13.1.2. Across East Devon, the proportion of travel to work trips to Exeter significantly outweighs the proportion of travel to work trips to the district's largest town, Exmouth; except for in Exmouth itself.

13.1.3. The strength of draw towards Exeter is at its strongest in areas closest to the city, at the north-west side of Exeter. However, the city also attracts commuters from across the district including those from the Exe Estuary and Ottery St Mary areas.

13.1.4. The proportion of East Devon workers who commute by car or van reduced from 63% in 2011 to 55%. However, when working from home is excluded, this represents an increase in the mode share among people who travel to work.

13.1.5. The proportion of sustainable travel commuting trips decreased between 2011 and 2021. Whilst the number of travel to work trips by cycle remained at 2%, the proportion of commuting trips by foot reduced from 11% to 9%. Public transport usage reduced from 5% in 2011 to 3% in 2021, but bus remained more widely used than train. However this is also significantly affected by the pandemic.

Walk

13.1.6. Walking is the 2nd most popular mode of travel to work across the East Devon area, used by 9% of residents who were employed at the time of the 2021 census. This was slightly lower than the Devon average (10%). On foot trips decreased between 2011 and 2021, however this was partly attributable to the rise in working from home.

13.1.7. While the majority of East Devon has low rates of commuting by foot, there are centres where walking is a more prevalent mode of commuting. This tends to be in the larger population centres, such as in Exmouth, Sidmouth, Seaton and Honiton.

13.1.8. 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

13.1.9. Overall, the TTW cycle mode splits across East Devon was 2% at the 2021 census; for individual settlements, this ranged between 1% and 3%, with the highest mode split being in Exmouth.

13.1.10. Cycle levels remained the same between 2011 and 2021 for the majority of areas in East Devon.

13.1.11. Cycle counters along the Exe Estuary Trail show the highest numbers of cyclists in the middle of the day, suggesting that many cycle trips are for leisure purposes, as opposed to commuting trips.

13.1.12. Cycling levels are shown to be very seasonal, with an obvious peak in August, and the lowest number of trips in January and December.

Bus

13.1.13. Between 2011 and 2021, the use of bus services for commuting in East Devon had declined, with the TTW modal share decreasing from 3% to 2%, but these figures are affected by the pandemic.

13.1.14. The area with the highest bus mode share is Cranbrook (4.2%), followed by Exmouth (2.7%).

Rail

13.1.15. Two train lines run through East Devon: the Avocet Line running from Exeter through to Exmouth along the eastern edge of the Exe Estuary, and the West of England line running from Exeter through the centre of the district towards Salisbury and London Waterloo. Across East Devon, according to the Office of Rail and Road, there has been a marginal 4% increase in train usage, from 1.9 million passengers in 2013 to 2.0 million in 2023.

13.1.16. The areas with the highest TTW mode split by train are the central area in Exmouth, followed by Honiton.

Vehicular

13.1.17. According to the 2021 Census, 55% of East Devon residents who were in employment used a car/van to travel to work. This was a slight reduction compared to 2011, when the car mode split was 63%.

13.1.18. Census data also shows that levels of car ownership have increased between 2011 and 2021, with 86% of households having access to a car/van in 2021, compared to 84% in 2011.

13.1.19. There are slight variations in car ownership across the district; in Exmouth only 81% of households had access to a car in 2021, while in Cranbrook this was greater at 96%.

13.1.20. Across the DCC-managed road network, traffic flows were highest towards the western edge of the district, with an AADT of over 44,000 recorded on the A376 at

Sandygate in 2024. Heading further east, AADTs were considerably lower, reducing to just 3,400 on the A3052 East of Rousdon (near the Dorset border).

13.1.21. On the SRN (managed by National Highways), traffic flows were highest on the M5, followed by those on the A30 (particularly west of Honiton), with the lowest flows recorded on the A35 at Axminster.

Road Safety

13.1.22. In 2023, there were 1,567 road casualties recorded by the police across Devon, of which 266 were in East Devon. This compares to 2,163 and 401 in Devon and East Devon, respectively, in 2019. The numbers of KSI (killed or seriously injured) casualties remained relatively stable between 2019 and 2023

13.1.23. Multi factor route analysis has been undertaken to compare the collision performance of the main roads in the East Devon area. Reflecting that the highest number of collisions occur in urban areas, the worst performing routes were mostly in and around Honiton and Exmouth.

Air Quality

13.1.24. East Devon currently has no designated AQMAs. Annual mean concentrations of NO2 throughout East Devon have typically been falling at most monitoring sites.

Conclusion

13.1.25. In summary, this report details the current state of the transport network within East Devon across all modes of travel. This info has been used when assessing the development being proposed as part of the East Devon Local Plan.