

APPENDIX G

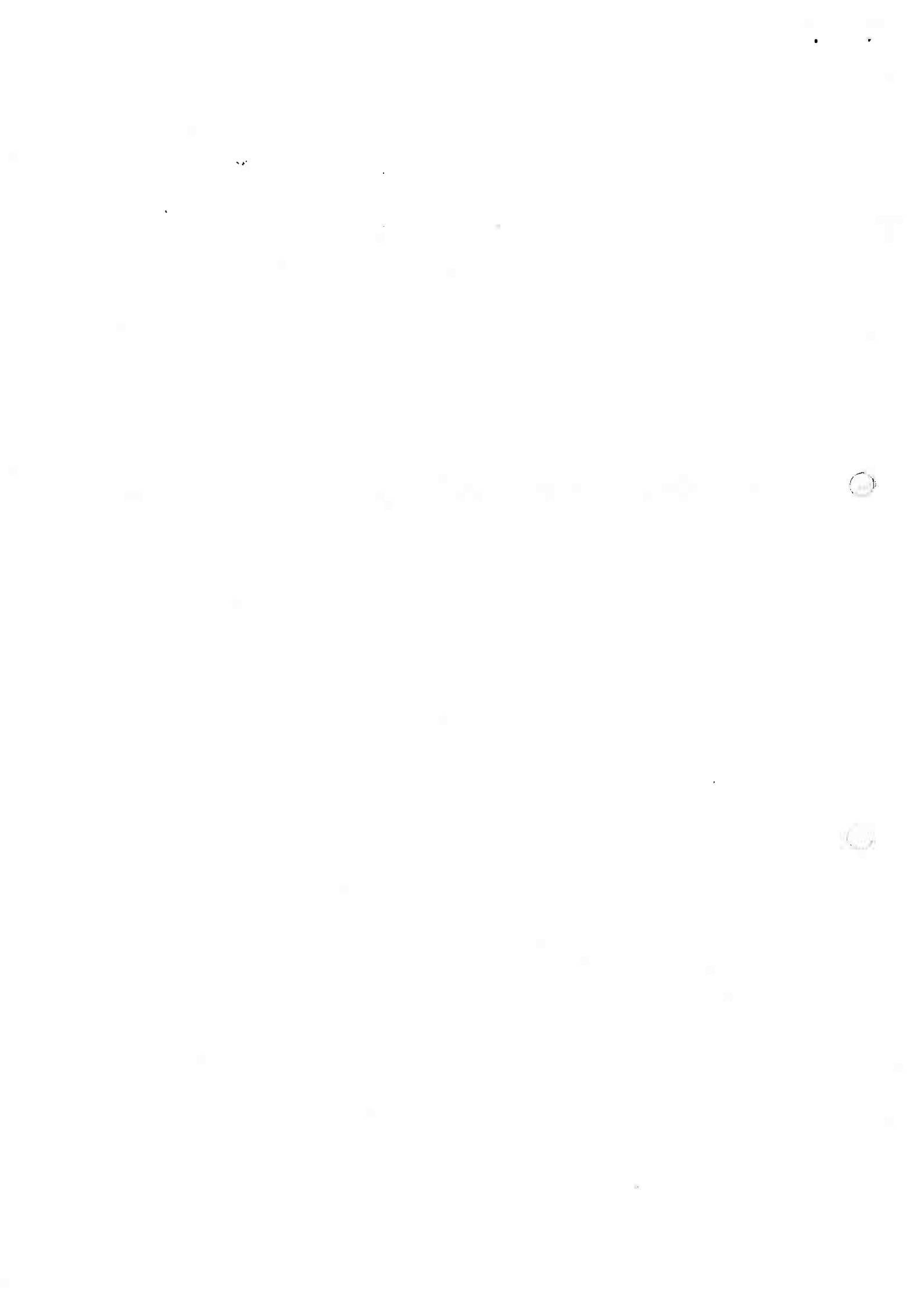


Travel Behaviour Research Baseline Survey 2008

Exeter

**Report for Devon County Council
and Exeter City Council**

September 2008



EXECUTIVE SUMMARY

On behalf of Devon County Council and Exeter City Council, an extensive programme of travel behaviour research was conducted in Exeter during spring 2008 by Socialdata with support from Sustrans.

The research was part of a wider programme, including a large-scale TravelSmart Individualised Travel Marketing (ITM) project in Exeter, funded by the Big Lottery Fund's Wellbeing Programme with match funding from Devon County Council and Exeter City Council.

The key objective of this baseline research was to provide a comprehensive database on personal travel behaviour among residents of Exeter, against which the outcomes of specific measures, notably Exeter's TravelSmart programme, could be measured by subsequent surveys. It also aimed to provide an assessment of public attitudes towards transport issues, and a detailed analysis of the potentials for reducing car use by increasing levels of walking, cycling and public transport.

The baseline research consisted of travel behaviour surveys and a series of in-depth interviews conducted in Exeter and Exminster¹.

The behavioural data collected during the survey gives a representative picture of day-to-day travel patterns of residents of the urban areas of Exeter. On an average day, people make three trips, performing 1.7 out-of-home activities. In doing so, they spend a little over one hour travelling (per person per day), covering an average distance of 21 kilometres.

The travel behaviour of most people is quite simple: more than half of people make just one journey per day, and the majority of these journeys are made for a single activity. Over four out of five trips start or finish at home.

Leisure is the single biggest trip generator, accounting for nearly one third of all trips made by Exeter residents. Work and shopping trips make up around one fifth of all trips. Just under one in ten trips are to school or college.

On an average day, around a quarter of trips made by Exeter residents is on foot (i.e. a genuine walking trip) while just 4% are by bicycle. Motorised private modes (car

¹ Exminster was included in the baseline survey because it formed part of the target area for the subsequent TravelSmart programme. The data from the relatively small Exminster sample are combined with those from Exeter in this report.

as driver or passenger, motorbike) account for three-fifths of all trips; a majority being made by car as driver. Public transport is used for around one in ten trips.

A more detailed analysis of the use of different travel modes shows that:

- The share of walking and cycling tends to be higher during the week than at weekends;
- Levels of walking are highest for education trips (42%) and lowest for work-related business (4%). Cycling reaches a peak of 10% for trips to work and accounts for a significant minority of education trips (5%);
- The mode share of car as driver is highest by some margin for work-related business (92%), followed by escort and work trips (over half of these trips);
- Public transport use is highest for shopping trips (18%) and above the average for personal business, work and education trips;
- Employed people make the majority of their trips by car as driver and make least use of sustainable travel modes; and
- In general, residents in education, the retired and unemployed make the greatest use of sustainable travel modes.

The research also reveals the importance of short, local trips:

- Nearly one fifth (19%) of all trips by Exeter residents are no further than one kilometre and approaching half (45%) are no longer than three kilometres. Over two-thirds (69%) are in the range of five kilometres and another 16% are between 5.1 and 10 kilometres. 15% of all trips are longer than ten kilometres.
- A large share of car trips are relatively short: more than a quarter are no further than three kilometres; and over half of car trips are no further than five kilometres.
- For the vast majority of all trips (79%), residents remain within their own local area, and of these trips more than half are undertaken by car either as driver (34%) or passenger (19%).

The analysis also shows how much, why and where cars are used by residents for their daily travel needs, for example:

- Nearly three quarters of cars are used at least once a day.
- The average privately-owned car is used for 37 minutes each day, to make a little more than two trips. The average distance covered for day-to-day car trips (excluding commercial and long-distance trips) is 21km per day. Each car is occupied by an average of 1.5 people (including the driver).
- 9% of all car trips within Exeter are no longer than 1km or less, and over a quarter (28%) are between 1.1 and 3.0km. A further 9% are between 3.1km and 5.0km.
- Of those car trips within the urban area, more than half are for shopping and leisure purposes, while around a quarter are for work.

The in-depth research shows that most residents recognised an increase in car traffic in Exeter in the last few years, and nearly all perceived this negatively. In the case of traffic planning conflicts between the car and sustainable travel modes, the vast majority of residents would support measures favouring public transport, cycling and walking even if these were to the disadvantage of car users. Overall, nine out of ten residents favoured making sustainable travel modes a priority in transport planning and policy.

The in-depth research also focused on the influences affecting mode choice, based on the specific trips recorded by residents in their travel behaviour diaries. This 'situational analysis' revealed that, in principle, significant shifts in travel behaviour are possible: for more than half (53%) of all trips currently made by car within Exeter, there are only subjective reasons (e.g. lack of information or poor perceptions of travel time, costs, comfort and infrastructure) preventing the use of walking, cycling or public transport as an alternative. As a result, these trips are in principle replaceable by one or more sustainable travel modes as follows:

- 23% could be made by public transport,
- 39% could be made by cycling, and
- 14% could be made on foot.

The analysis reveals the most important subjective factors preventing car trips being switched to more sustainable travel modes, i.e. in situations where a reasonable alternative exists and where there are no objective constraints against it being used. For public transport, lack of, or poor quality, information forms the single most important factor, with 11% of trips affected. For cycling and walking, the most important subjective barrier is a misperception of travel time.

The research also identified a substantial proportion of trips which were made by car even though there were no objective or specific subjective barriers against use of sustainable travel modes. The greatest proportion of these 'free of choice' trips, for which there is the most ready potential for change, exists in relation to cycling.

By identifying the scope and scale of the subjective factors affecting people's mode choice in real day-to-day situations, the research demonstrates that the Exeter TravelSmart programme has the potential to unlock significant modal shift away from the car towards greater use of walking, cycling and public transport.