



Vision Zero South West Partnership

ROAD USER INSIGHTS SURVEY





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EXECUTIVE SUMMARY

WSP is pleased to present this completed report to the Vision Zero South West (VZSW) Partnership and would like to thank the Partnership and Devon & Cornwall Police for the opportunity to undertake this work on your behalf. Our completed report, based on responses from 1,354 respondents offers valuable insight into driver behaviours to provide evidence in developing the VZSW Partnership future approach and strategy.



WSP was appointed by Devon & Cornwall Police, on behalf of Vision Zero South West, to undertake road user surveys to provide insight to support the VZSW aim to reduce serious and fatal casualties to 50% by 2030, and to zero by 2040.

The WSP Insights team, supported by Prolific (WSP's partner research organisation) identified a target sample size of 1,100 respondents, made up of those living within Devon or Cornwall. The final number of respondents achieved was 1,354 representing a wide range of road-user demographics and sufficient to provide insight across a range of themes, those being:

- Young car drivers aged 16-24
- Drivers aged over 70
- Commercial vehicle drivers (LGV and HGV)
- Pedestrians
- Motorcyclists
- Pedal and electric cyclists

Of the 1,354 respondents, 5.9% used the roads only as a pedestrian and did not hold a driving licence, 4.5% were pedestrians/cyclists who held a driving licence but did not ride/drive a motorised vehicle whilst the remaining 89.6% drove/rode motorised vehicles as well as being pedestrians.

Respondents ranged in age from 16-24 to over 70, with the largest number of respondents coming from the 55-69 (26.1%) age group, and the smallest number of respondents the drivers aged over 70 (8%). Gender split was 57.8% female, 41.5% male and 0.7% who preferred not to say.

The completed report provides a comprehensive breakdown of the responses provided, allowing for development of strategies by VZSW to reflect the findings and continue progress towards the 2030 and 2040 road safety ambitions.



Taking into account the VZSW partnerships Safety Performance Indicators, the responses can be summarised as follows:

- **Compliance with speed limits:** 71.7% of participants responded that they sped at most once a month on national roads, up to 73.8% on local roads. Only 7.5% of people indicated that they speed on every journey on national roads, down to 3.7% on local roads.
- **Drink and drug driving:** Most people did not engage in drink or drug driving, with 91.4% of people stating that they never drink drive and 99% of people never driving under the influence of illegal drugs. Many people who did drink drive reported that they had only engaged in it once or twice in the last twelve months, with the highest frequency to be chosen at once or twice a month.
- **Seatbelt use:** Seat belt use amongst drivers was very high, with 99.6% of respondents reporting that they always wear one.
- **Mobile phone use:** Handheld mobile phone use was reported by 13% of participants, with a further 17.2% of people using it on speakerphone whilst holding it in their hand or resting it on their person. A further 54% of people used their mobile phone through hands-free technology.
- **Motorcyclist use of Personal Protective Equipment (PPE):** All motorcyclists reported that they used a helmet while riding, with the majority stating that they used some other form of PPE. However, only 75% stated that they used full PPE (complete set of armoured clothing and a helmet), indicating there is a potential gap to improve motorcyclist safety.

In addition to the questions specific to the road safety objectives of the VZSW Partnership questions were also asked about the awareness of the Partnership and of Operation Snap. Only 31.1% of participants had any familiarity with VZSW, dropping to 11.9% confident enough to describe it. Overall awareness of Operation Snap was lower, at 23.9% although 15.3% felt confident enough to explain it indicating better familiarity amongst those aware.

The detailed report provides insight and intelligence in response to the requirements set out by the VZSW Partnership. The objective of the survey being to gain insight into the self-reported behaviours of specific road users and for the VZSW partnerships to inform their future interventions and activities.

Due to the sensitive (and potentially incriminating) nature of the survey questions relating to speed/drink etc., the survey was completed with total anonymity, with participants having assurance that their privacy would be protected throughout, enabling them to answer questions truthfully to obtain a transparent data set for analysis.

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1 BACKGROUND

Devon and Cornwall Police on behalf of the Vision Zero South West (VZSW) Partnership commissioned WSP for the provision of road user surveys, in support of their targets aiming to reduce serious and fatal casualties by 50% by 2030, and to zero by 2040.

To work towards those targets, monitoring of a range of safety performance indicators is required, which includes safe road use.

To be able to measure safe road use, a road user survey was designed and delivered to residents within Devon and Cornwall, as well as to non-residents who travel on the roads within Devon and Cornwall regularly (i.e. on average 4 days per week or more).

Themes relevant to the road user survey were;

- Young car drivers aged 16-24
- Older car drivers aged over 70
- Commercial vehicle drivers (LGV and HGV)
- Pedestrians
- Motorcyclists
- Pedal and electric cyclists

The VZSW partnerships Safety Performance Indicators used to frame the road user survey questions were as follows;

- Percentage of traffic complying with speed limits on national roads
- Percentage of traffic complying with speed limits on local roads
- Percentage of drivers who do not drive after a) consuming alcohol b) consuming drugs
- Percentage of vehicle occupants using a seat belt a) driver b) front seat passenger
- Percentage of drivers not using in vehicle phone a) handheld b) hands free
- Percentage of motorcyclists wearing full PPE

The objective of the survey and subsequent analysis was to gain insight into the self-reported behaviours of specific road users and for the VZSW partnerships to inform their future interventions and activities.

Due to the sensitive (and potentially incriminating) nature of the survey questions relating to speed/drink etc., the survey was designed to be completed with total anonymity, with participants having assurance that their privacy would be protected throughout, enabling them to answer questions truthfully to obtain a transparent data set for analysis.

2 SURVEY METHODOLOGY

2.1 SURVEY DESIGN

The survey was designed in collaboration with VZSW by experienced quantitative researchers using questionnaire design principles from behavioural science. To achieve the desired sample for the study, (n=1100), we used several different methods including:

- An online panel provider
- Snowballing effect from WSP staff sharing with their networks in the Southwest (including offices in Exeter, Taunton, Truro, and Bristol).
- In person data collection
- Vision Zero South West social media and communications channels

The survey, comprised of 91 questions in total, including many ‘branched’ questions only targeted at specific groups. It was designed using the Smart Survey online survey platform and was shared electronically. Branching ensured that only questions specific to desired user groups were answered by them (for example, there was a specific section for older drivers that only those aged over 70 were directed towards).

The survey was left open until the desired sample size was achieved. The total achieved sample size was 1354 responses within the region, with an additional 75 responses were received from out of the region which have been excluded from the analysis below. As only a small number of survey questions were mandatory (this was necessary to ensure that the branching of the survey worked properly, and people were only asked questions that were relevant to them) it has not been possible to guarantee that the maximum number of participants eligible for each question have answered. The total number of responses for each question is presented alongside the results to aid in interpreting the data.

2.2 SMARTSURVEY PLATFORM

SmartSurvey is a digital tool which can be used to create, share, and analyse online surveys. SmartSurvey offers all features of leading survey tools. It also meets WSP’s data standards and is GDPR compliant.

2.3 PANEL PROVIDER

We used a two-phase participant recruitment approach via a trusted panel provider (Prolific) with a broad participant base to achieve some of the sample. Prolific are a market leading online survey company, used by many leading organisations including organisations such as Google, Meta, and the University of Oxford.

Firstly, we developed a short “screener” survey hosted electronically on Microsoft Forms to ensure that from Prolific’s pool of potential respondents we were only recruiting from within Devon and Cornwall (or that as a minimum they travelled into the region at least four times per week). We achieved this by only inviting panel members from specific regional postcode areas to participate in the screener – the specific postcodes invited were BA, BS, DT, EX, NP, PL TQ, and TR. Via this route we achieved a total of 619 respondents.

As the number of suitable candidates from the Prolific pool was below the desired sample size of 1,100, we used several different approaches to increase the sample size. Firstly, we worked with Prolific to “boost” the sample within their pool, and then deployed additional methodologies to reach a wider group.

2.4 OTHER METHODS

2.4.1 FURTHER ONLINE ENGAGEMENT

This included social media campaigns supported by Vision Zero South West, engagement with regional groups on LinkedIn, and engagement with local residents’ Facebook community groups. It is worth noting that the Vision Zero South West social media campaigns resulted in 354 responses as there was a specific question about awareness of Vision Zero South West in the surveys. A total of 421 respondents expressed any familiarity with Vision Zero South West, of which 160 felt they could describe it to a friend or where very familiar with it. For further information see Section 5.5.

2.4.2 IN-PERSON DATA COLLECTION

As the online data collection routes described above were progressing, the data analysts were observing the uptake across the regions of interest and identified that there were some under-represented areas, requests were made to have access to cafes or areas where WSP staff could administer in-person surveys in these areas. Unfortunately, none of those facilities were able to accommodate the requests, so we approached contacts responsible for service stations in the South West. Three members of the project team spent a day in Saltash Services engaging with members of the public and inviting them to complete the survey either in the service station or to take away a leaflet with the link and QR code to access the survey at home. The team successfully engaged with 115 members of the public. The combination of online engagement and in-person data collection elicited 735 responses.

3 SURVEY DEMOGRAPHICS

3.1 POPULATION DEMOGRAPHICS

The survey received responses from 1,354 Devon and Cornwall residents, split across the different regions as shown in Figure 3-1. An additional 75 responses were received from out of the region, however, due to inconsistencies in the respondents stated use of Devon and Cornwall roads it was decided to focus only on those who lived within Devon and Cornwall.

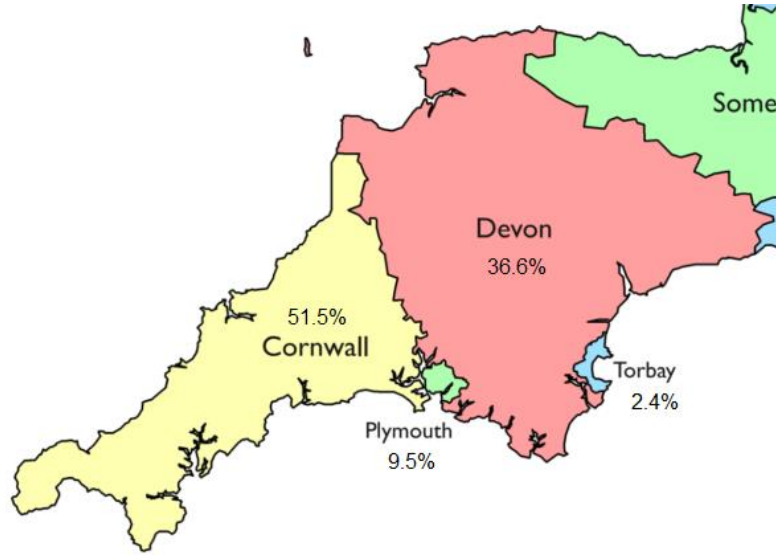


Figure 3-1 - Geographic split of respondents. n=1354.

Participants were asked to report their age and sex, as shown in Table 3-1. The overall split in reported sex was 41.5% male, 57.8% female, and 0.7% participants who preferred not to say.

Table 3-1 - Demographic breakdown of respondents. n=1354.

| Age | Male | | Female | | Prefer not to say | | Total | |
|--------------|------------|--------------|------------|--------------|-------------------|-------------|-------------|---------------|
| | Count | % | Count | % | Count | % | Count | % |
| 16-24 | 33 | 2.4% | 68 | 5.0% | 1 | 0.1% | 102 | 7.5% |
| 25-34 | 93 | 6.9% | 140 | 10.3% | 2 | 0.1% | 235 | 17.4% |
| 35-44 | 106 | 7.8% | 168 | 12.4% | 2 | 0.1% | 276 | 20.4% |
| 45-54 | 111 | 8.2% | 166 | 12.3% | 2 | 0.1% | 279 | 20.6% |
| 55-69 | 165 | 12.2% | 186 | 13.7% | 3 | 0.2% | 354 | 26.1% |
| Over 70 | 54 | 4.0% | 54 | 4.0% | 0 | 0.0% | 108 | 8.0% |
| Total | 562 | 41.5% | 782 | 57.8% | 10 | 0.7% | 1354 | 100.0% |

To facilitate interpretation of this demographic breakdown, Table 3-2, Table 3-3, Table 3-4 show the 2021 Census data for the region, giving the geographic population split, age categories, and sex.

Table 3-2 indicates that the survey results will have an increased influence from Cornish respondents compared to their population, whilst underreporting those in other regions, particularly the Torbay area. Despite this, we believe the survey results to be a good representation of the opinions across the region. Overall, the age distribution of the respondents is representative of the region, although both the 16-24 and 55-69 populations were slightly underrepresented within the responses this is within the tolerance of the survey.

Table 3-2 - 2021 Census Data – Region

| Area | Population | % of Population |
|----------|------------|-----------------|
| Devon | 683459 | 45.7% |
| Cornwall | 477420 | 31.9% |
| Plymouth | 218623 | 14.6% |
| Torbay | 117012 | 7.8% |

Table 3-3 - 2021 Census Data – Age

| Age | Population | % of Population |
|---------|------------|-----------------|
| 16-24 | 141448 | 11.0% |
| 25-34 | 175865 | 13.6% |
| 35-44 | 197219 | 15.3% |
| 45-54 | 242714 | 18.8% |
| 55-69 | 420824 | 32.6% |
| Over 70 | 111344 | 8.6% |

Table 3-4 - 2021 Census Data – Sex

| Sex | Population | % of Population |
|--------|------------|-----------------|
| Male | 868402 | 48.6% |
| Female | 917562 | 51.4% |

3.2 ROAD USE

Participants were first asked a high-level question on their road use, indicating if they made use of any motorised vehicle, were a pedestrian or cyclist with a driving licence, or a pedestrian only. The results are shown in Figure 3-2.

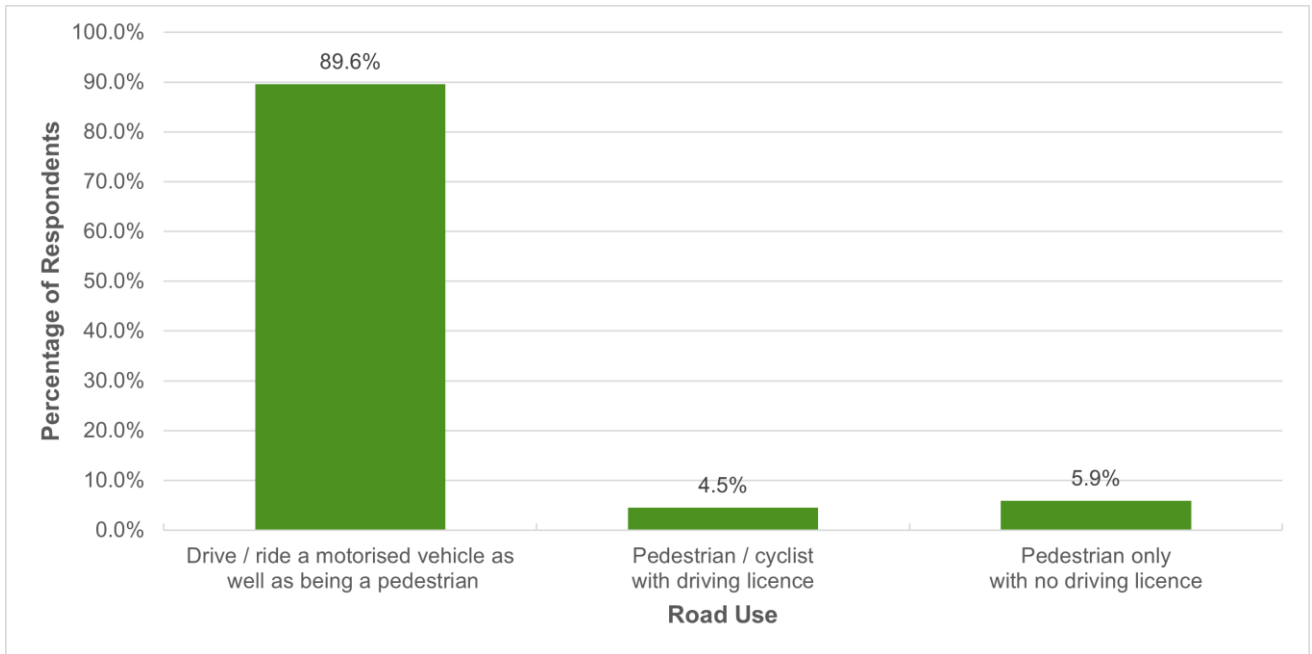


Figure 3-2 - Road use of respondents, n = 1354.

Participants were asked to indicate which modes of transport or use of the road they had engaged in over the last 12 months. It should be noted that the % given is the % of total number of respondents to the survey as the same respondent can make use of multiple modes of transport.

Table 3-5 - Number of participants engaging in each type of road use, n = 1354.

| Road Use | Count | % |
|---------------------|-------|-------|
| Car | 1219 | 90.0% |
| Motorbike | 99 | 7.3% |
| Light Goods Vehicle | 113 | 8.3% |
| Heavy Goods Vehicle | 24 | 1.8% |
| Professional Driver | 106 | 7.8% |
| e-Scooter | 32 | 2.4% |
| Cyclist | 463 | 34.2% |
| Pedestrian | 1275 | 94.2% |
| Public Transport | 982 | 72.5% |

To better understand how each vehicle was used, participants were asked to report the mileage driven / ridden by each and the frequency with which they had used that mode of transport within the last 12 months within Devon & Cornwall.

Table 3-6 reports the breakdown of reported mileages for those respondents who indicated that they make use of that vehicle (i.e., the percentages for car drivers is the percentage of 1219 people who reported above that they drive a car).

Table 3-6 - Reported mileage by vehicle type.

| Vehicle | Under 1000 | 1000-5000 | 5001-8000 | 8001-12000 | Over 12000 |
|-----------|------------|-----------|-----------|------------|------------|
| Car | 8.1% | 30.7% | 25.5% | 23.2% | 12.6% |
| LGV | 43.0% | 25.0% | 11.7% | 7.8% | 12.5% |
| HGV | 60.5% | 7.9% | 10.5% | 0.0% | 21.1% |
| Motorbike | 46.9% | 36.7% | 8.2% | 5.1% | 3.1% |
| e-Scooter | 95.7% | 2.1% | 0.0% | 2.1% | 0.0% |
| Bicycle | 85.7% | 12.8% | 1.3% | 0.2% | 0.0% |

Table 3-7 Shows how frequently respondents who engaged in each type of road use did so within Devon & Cornwall during the last 12 months.

Table 3-7 - Frequency of use of vehicles.

| | Daily | Weekly | Monthly | Seasonal | Yearly | Never | Other |
|---------------------|-------|--------|---------|----------|--------|-------|-------|
| Car | 55% | 39% | 4% | 1% | 0% | 1% | NA |
| Motorbike | 6% | 23% | 21% | 17% | 11% | 11% | 12% |
| Light Goods Vehicle | 57% | 27% | 10% | 4% | 1% | 1% | NA |
| Heavy Goods Vehicle | 44% | 22% | 7% | 7% | 4% | 15% | NA |
| Professional Driver | 74% | 18% | 4% | 1% | 0% | 2% | NA |
| e-Scooter | 0% | 0% | 1% | 1% | 1% | 97% | NA |
| Cyclist | 1% | 6% | 9% | 14% | 6% | 63% | NA |

Motorcyclists who responded “other” indicated that they were former riders who no longer rode, or their bike was currently off-road.

4 SAFETY PERFORMANCE INDICATOR FINDINGS

The Vision Zero Southwest Partnership has a set of Safety Performance Indicators (SPIs) that are used to assess progress towards achieving zero harm on the road network. These are listed below, with those that the results of this survey directly related to highlighted in **bold**.

1. **Percentage of traffic complying with speed limits on national roads (e.g., National Highways roads).**
2. **Percentage of traffic complying with speed limits on local roads.**
3. **Percentage of drivers who do not drive after**
 - a. **Consuming alcohol.**
 - b. **Consuming drugs.**
4. **Percentage of vehicle occupants using a seat belt [when a]:**
 - a. **Driver.**
 - b. **Front seat passenger.**
5. **Percentage of drivers not using in vehicle phone:**
 - a. **Handheld.**
 - b. **Hands free.**
6. Percentage of vehicles manufactured in the last 3/5 years.
7. Percentage of routes that are red on the high harm routes dashboard.
8. **Percentage of motorcyclists wearing full PPE.**

4.1 COMPLIANCE WITH SPEED LIMITS

All participants who indicated that they drove or rode on the roads of Devon and Cornwall were asked confidential questions about their compliance with speed limits and their reasons for complying / not complying.

4.1.1 NATIONAL ROADS

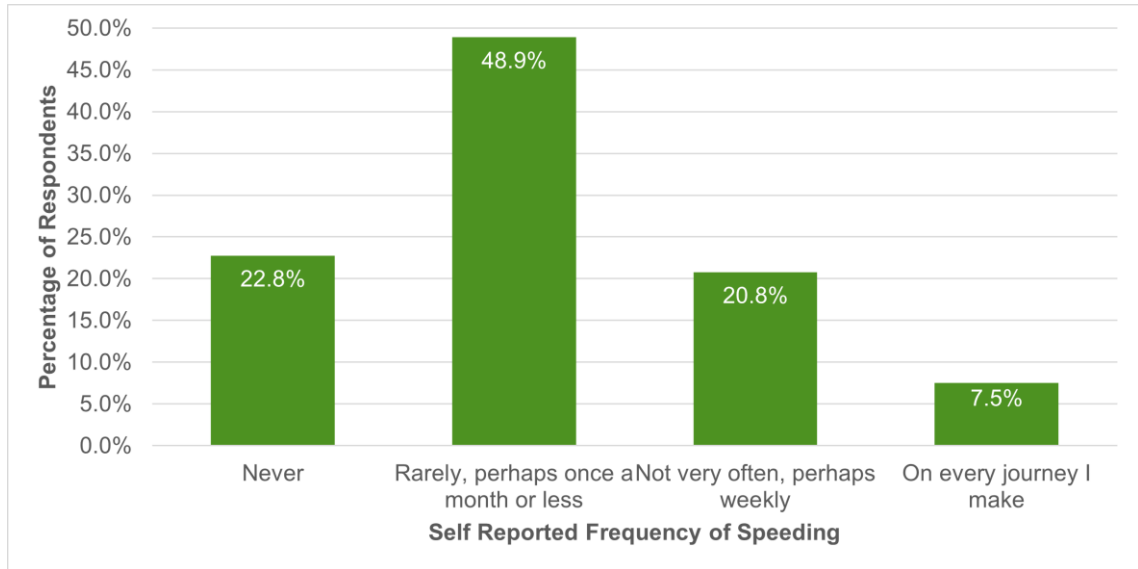


Figure 4-1 - Self reported compliance with speed limits on national roads, n = 1155.

Overall, 77.2% of people reported at least some level of speeding on national roads (defined as dual carriageways and motorways within the region such as the A38 or M5). A much smaller percentage of people indicated that they speed frequently, 28.3%, which compares favourably to the national average of 48% of drivers speeding on motorways.¹ Care should be taken however, as self-reported speeding may be lower than measured speeding.

¹ [Vehicle speed compliance statistics for Great Britain: 2021 - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

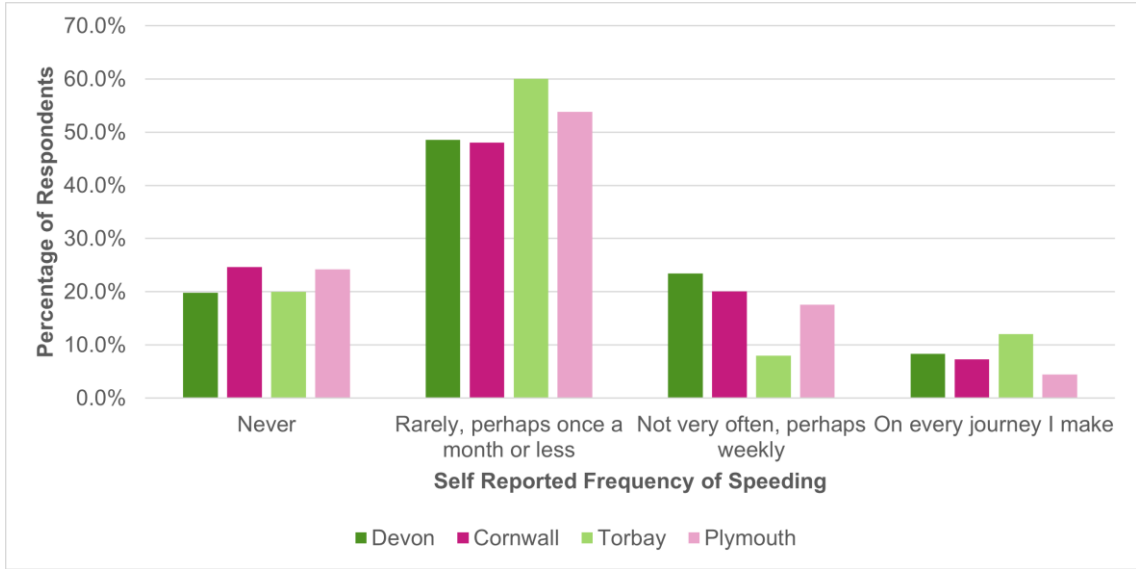


Figure 4-2 - Geographic breakdown of frequency of speeding on national roads, n=1155.

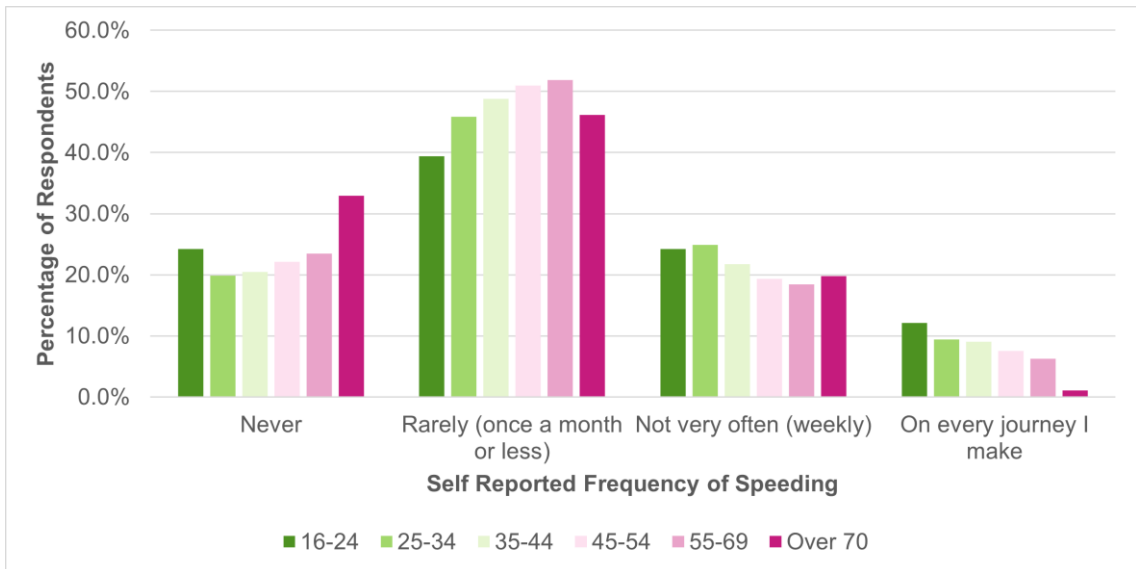


Figure 4-3 - Age breakdown of frequency of speeding on national roads, n=1155.

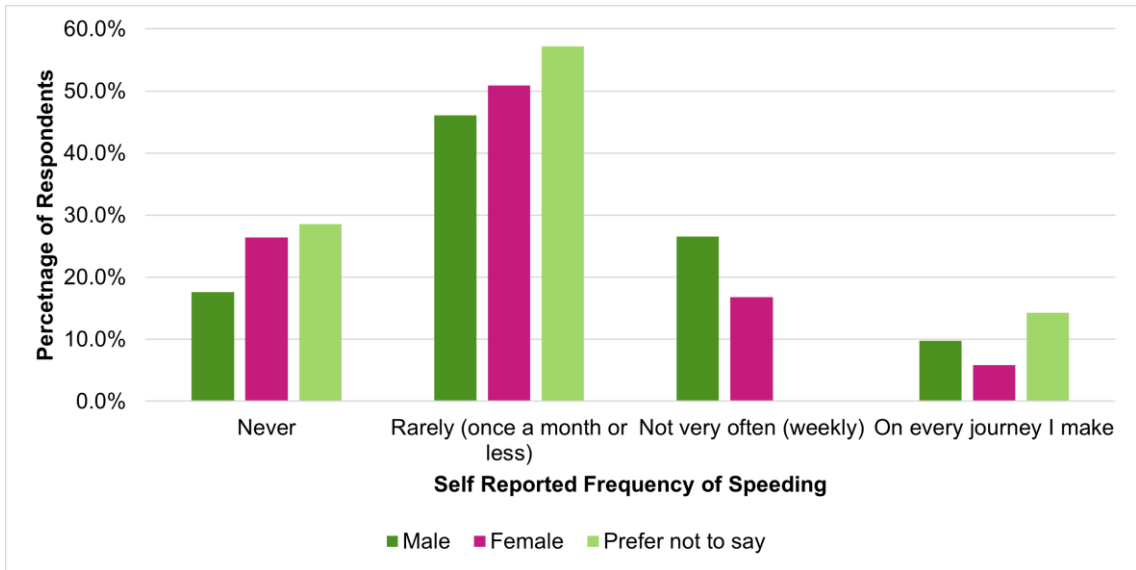


Figure 4-4 - Sex breakdown of frequency of speeding on national roads, n=1155.

Figure 4-2, Figure 4-3, and Figure 4-4 provide various demographic breakdowns of the respondents and their frequency of speeding on National Roads. The frequency is broadly consistent across the geographic region, except for Torbay. However, as Torbay is a relatively small sample size, care should be taken in using these results. In contrast, there is some dependence on age and sex for frequency of speeding which could be investigated further. The data for those who prefer not to report their sex is extremely small and conclusions cannot be drawn from it.

4.1.2 LOCAL ROADS

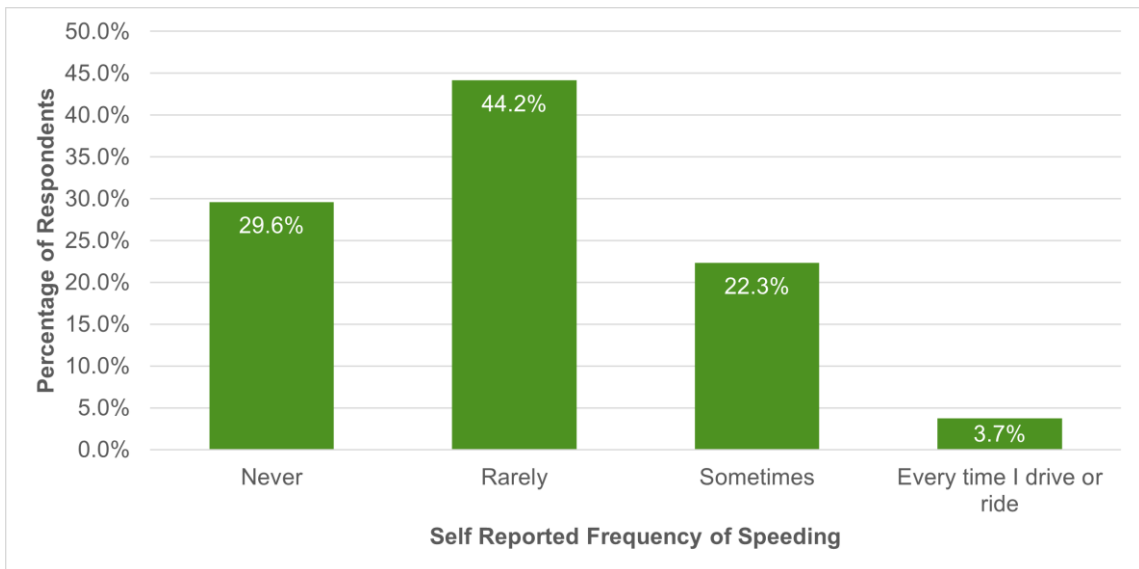


Figure 4-5 - Self reported compliance with speed limits on local roads, n = 1153.

Compliance with speed limits on local roads was slightly better than on national roads, with 70.2% of people indicating that they engaged in any kind of speeding. At a national level, speeding on local roads is differentiated between speeding on national speed limit single carriageway roads (11%) and

30mph roads (51%), indicating that the 26% of people who engage in frequent speeding is broadly consistent with the overall average.²

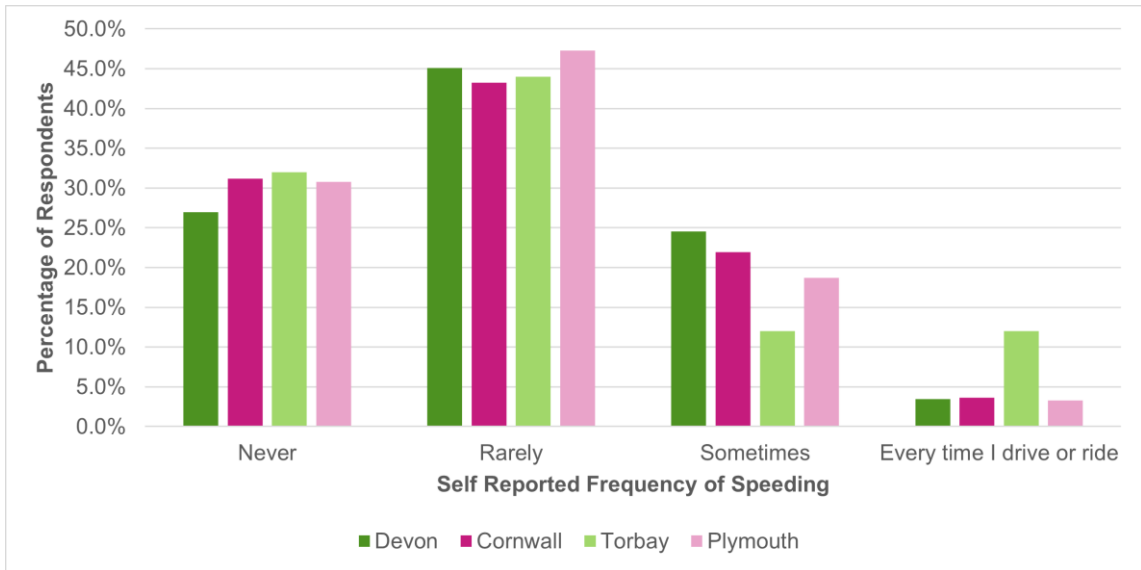


Figure 4-6 - Geographic breakdown of self reported speeding on local roads, n = 1153.

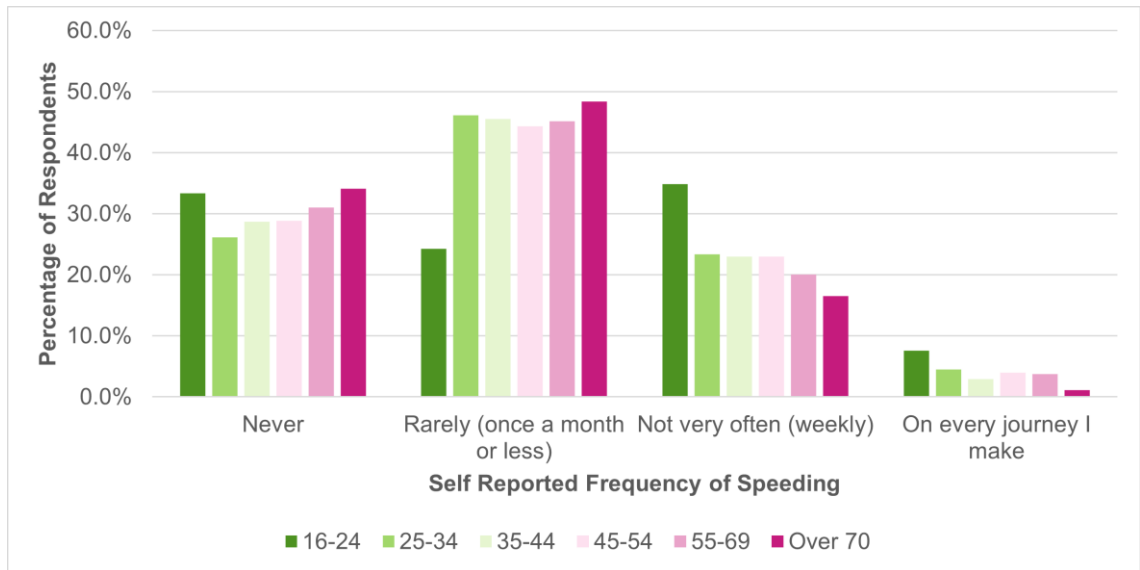


Figure 4-7 - Age breakdown of self reported speeding on local roads, n = 1153.

² [Vehicle speed compliance statistics for Great Britain: 2021 - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

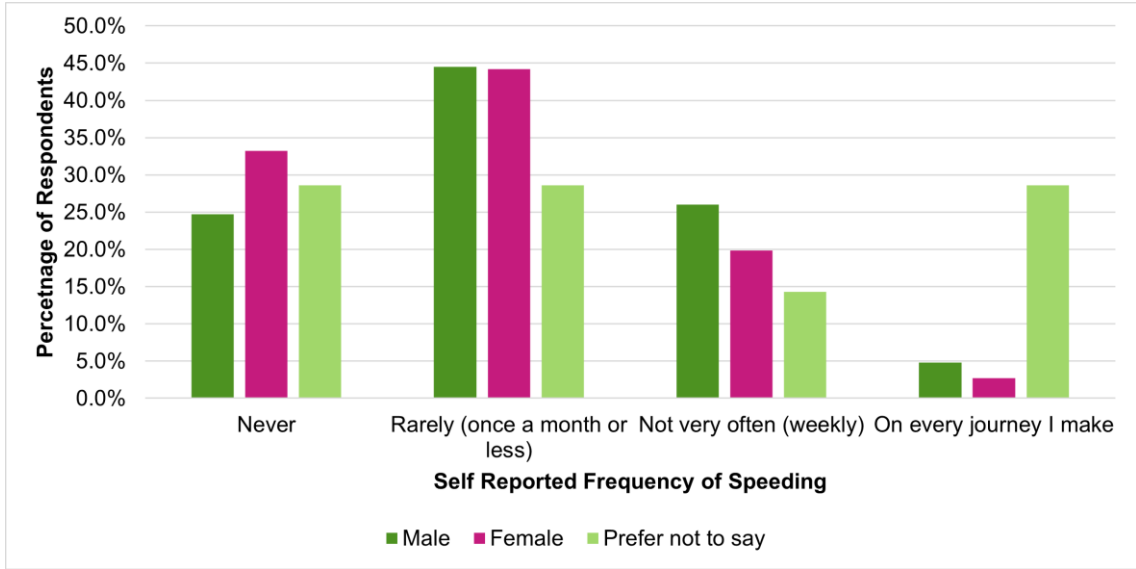


Figure 4-8 - Sex breakdown of self reported speeding on local roads, n = 1153.

Figure 4-6, Figure 4-7, and Figure 4-8 provide various demographic breakdowns of the respondents and their frequency of speeding on local roads. Like the situation for national roads it can be seen that the frequency is broadly consistent across the geographic region, with the exception of Torbay. However, as Torbay is a relatively small sample size care should be taken in using these results. The relationship between age and frequency of speeding seems to be stronger for local roads but that between sex and frequency of speeding is not present.

4.1.3 ATTITUDES TOWARDS SPEEDING

Participants who responded that they never speed were asked why this is the case. Most people cited the law and risk associated with speeding as the major factor for not speeding, although a significant minority also indicate the cost and environmental benefits of lower speed, as can be seen in Figure 4-9.

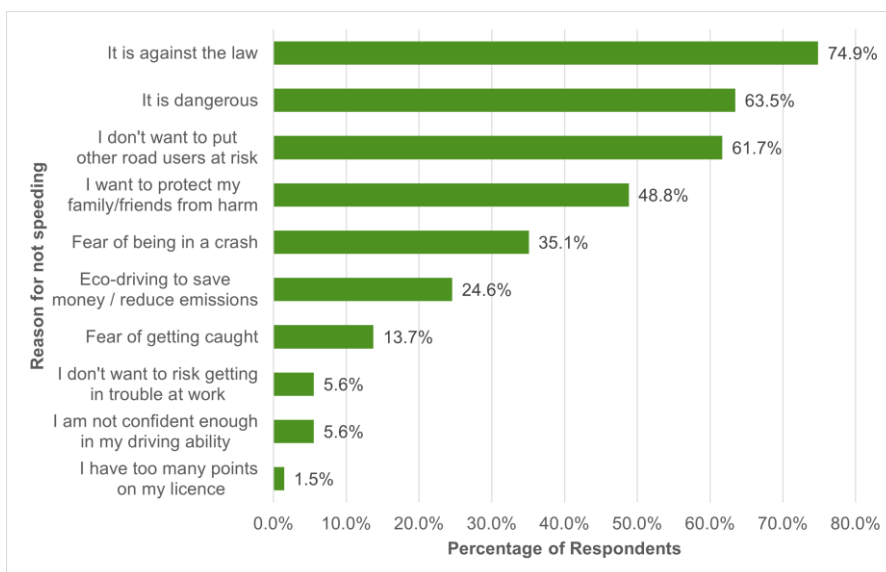


Figure 4-9 - Reasons why respondents do not speed, n = 342

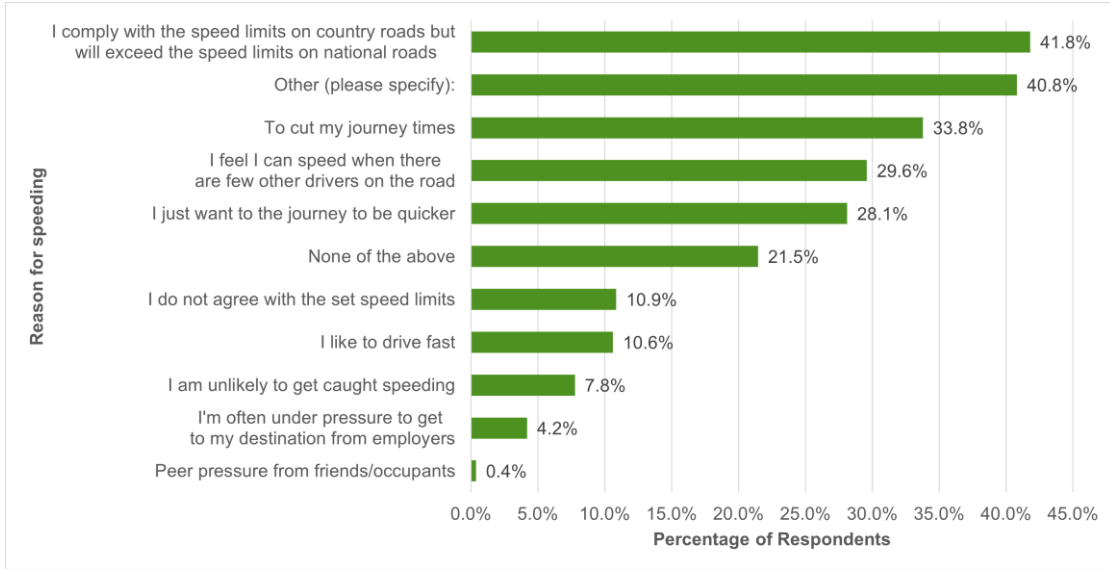


Figure 4-10 - Reasons why respondents speed, n = 892.

Similarly, Figure 4-10 shows the reasons why participants who engage in some level of speeding do so. Although no reason was supported by most respondents, faster journeys and reduced journey times was a common response. A substantial minority indicate that they speed on national roads but not country roads which agrees with national statistics. Similarly, reduced traffic volumes are associated with increased speeding. Three main themes were noted in the free text responses in the “other category”:

- Overtaking others and thus speeding to reduce the time of the manoeuvre.
- Accidentally speeding due to distraction or the performance of modern cars.
- Matching the speed of surrounding traffic.

4.2 DRINK AND DRUG USE OF ROAD

4.2.1 DRINK USE OF ROAD

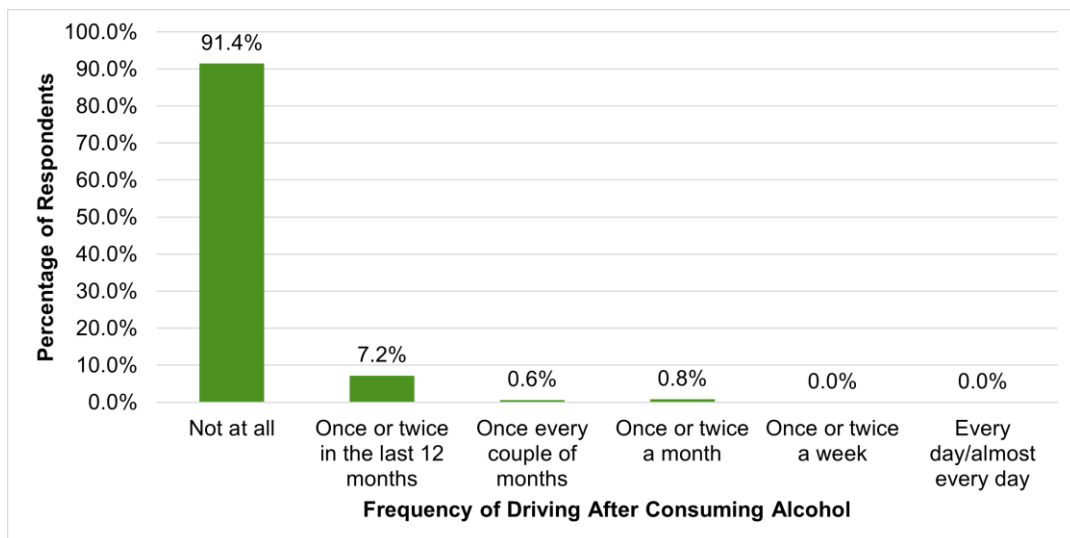


Figure 4-11 - Frequency of road use after consuming alcohol, n = 1155.

Figure 4-11 shows self-reported frequency of road use after consuming alcohol. Over 90% of respondents reported that they never used the roads under the influence of alcohol, of those who did admit to road use under the influence of alcohol, it seemed to be occasional rather than habitual, with 7.2% reporting doing this once or twice over the last year. Comparing this to national statistics indicates that road use after drinking is slightly more prevalent in the region than nationally, with 94.1% never engaging in it and 3.3% engaging once or twice a year.³

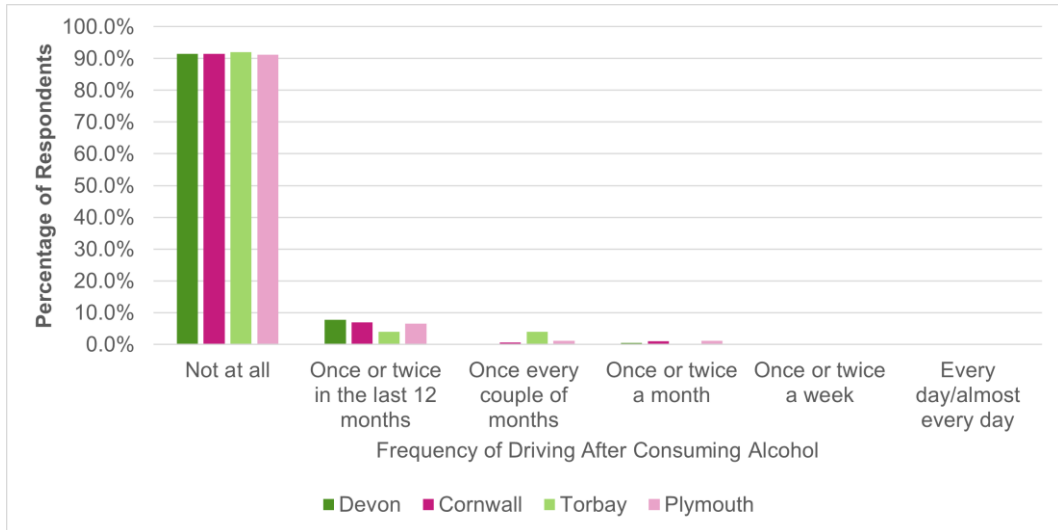


Figure 4-12 - Geographic breakdown of road use after consuming alcohol frequency, n = 1155.

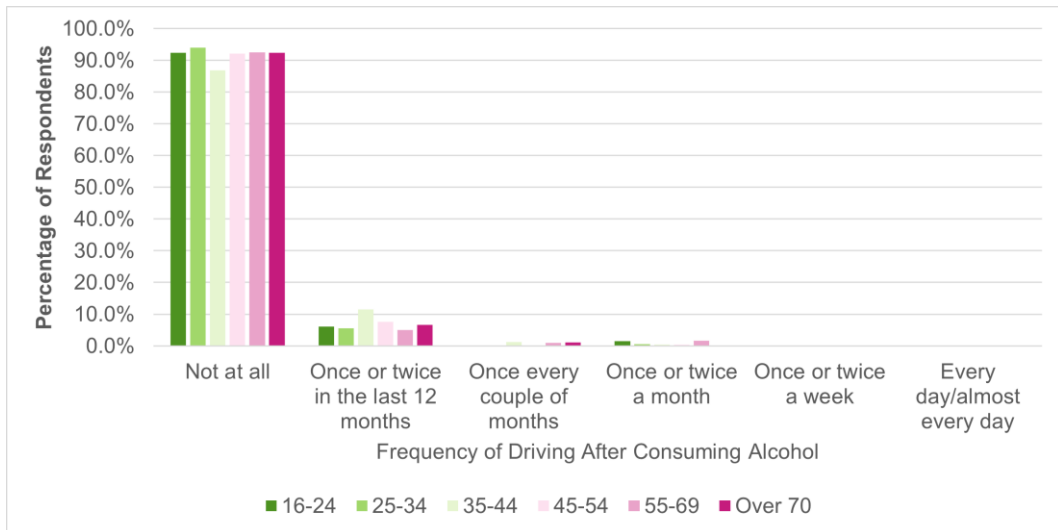


Figure 4-13 - Age breakdown of road use after consuming alcohol frequency, n = 1155.

³ RAS51101 from [Reported drinking and driving: data tables - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/data-collections/reported-drinking-and-driving)

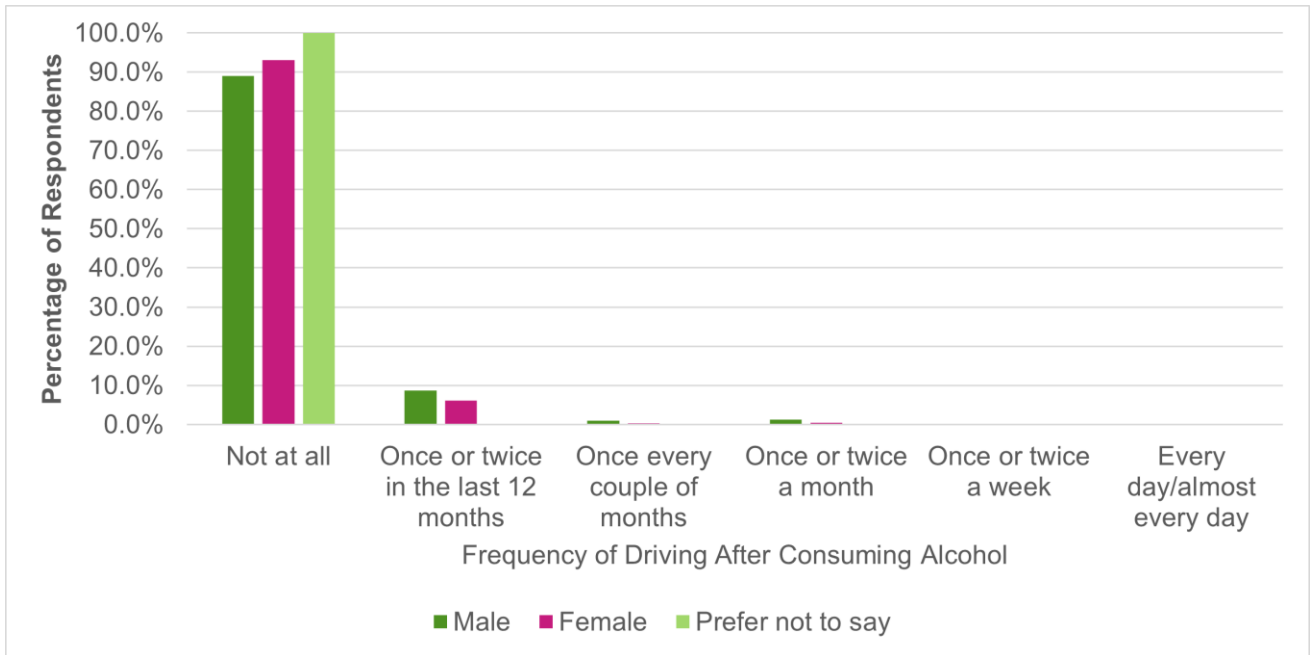


Figure 4-14 - Sex breakdown of road use after consuming alcohol frequency, n = 1155.

Figure 4-12, Figure 4-13, Figure 4-14 provide various demographic breakdowns of the respondents and their frequency of road use under the influence of alcohol. There seem to be no obvious trends in self-reported drink road use by geographical area, age, or sex.

Table 4-1 - Frequency of using the road after consuming alcohol by type of use.

| Vehicle | Frequency of DUI Alcohol | | | | |
|-------------------------------------|--------------------------|--------|-----------|-------|--------|
| | Never | Rarely | Sometimes | Often | Always |
| Car | 94.3% | 5.1% | 0.6% | 0.0% | 0.0% |
| Motorbike | 99.0% | 1.0% | 0.0% | 0.0% | 0.0% |
| Light Goods Vehicle | 98.3% | 0.0% | 1.7% | 0.0% | 0.0% |
| Heavy Goods Vehicle | 95.8% | 0.0% | 4.2% | 0.0% | 0.0% |
| Professional Driver | 97.1% | 2.0% | 0.0% | 1.0% | 0.0% |
| Cyclist - After One Drink | 76.0% | 14.7% | 7.8% | 0.0% | 1.5% |
| Cyclist - Above Driving Legal Limit | 89.1% | 7.9% | 2.4% | 0.0% | 0.6% |
| Pedestrian | 50.8% | 27.7% | 18.9% | 0.5% | 2.1% |

Table 4-1 shows how often each type of road user has carried out a journey after consuming alcohol. The number of respondents for professional drivers, LGVs, and HGVs are low so care should be taken in interpreting the results. It can be seen that generally most types of road users do not travel after consuming any alcohol. The exception to this is cyclists, who may not be aware that cycling whilst drunk is also an offence. Pedestrians have been included to act as a comparison point for other types of road use, reporting much higher rates of road use after drinking.

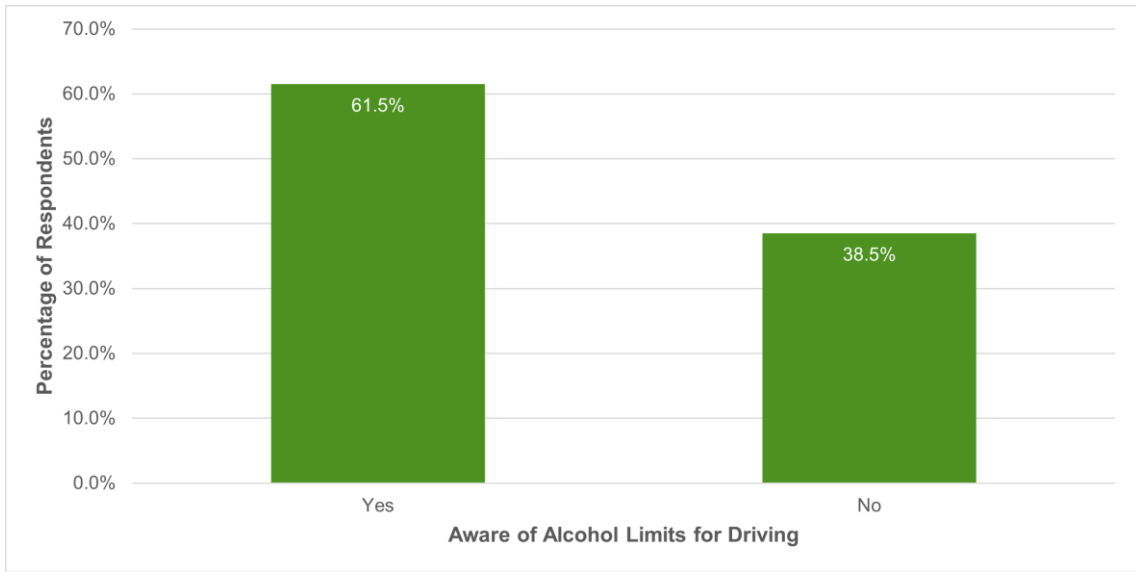


Figure 4-15 - Respondent awareness of the legal limits for alcohol intake and road use, n = 1153.

In terms of awareness of legal limits for alcohol intake and road use, as seen in Figure 4-15, around 60% of respondents said that they were aware of the legal limits. Figure 4-16 shows that slightly fewer Torbay respondents were aware of the legal limits than the other areas but as previously stated, the Torbay respondents are a small part of the sample. As seen in Figure 4-17, slightly more older road users reported being aware of the legal limits for alcohol intake. Figure 4-18 shows that more males than females rated themselves as being aware of the legal limits and more respondent who preferred not to disclose their sex reported having lower awareness levels.

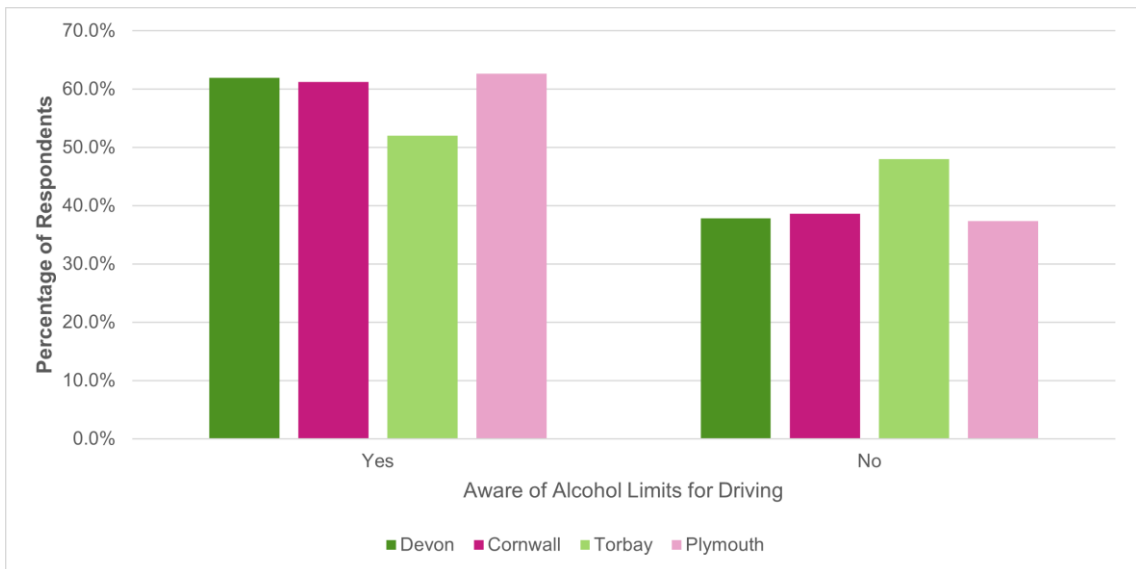


Figure 4-16 - Geographic breakdown of awareness of alcohol legal limits, n = 1153.



Figure 4-17 - Age breakdown of awareness of legal limits for alcohol, n = 1153.

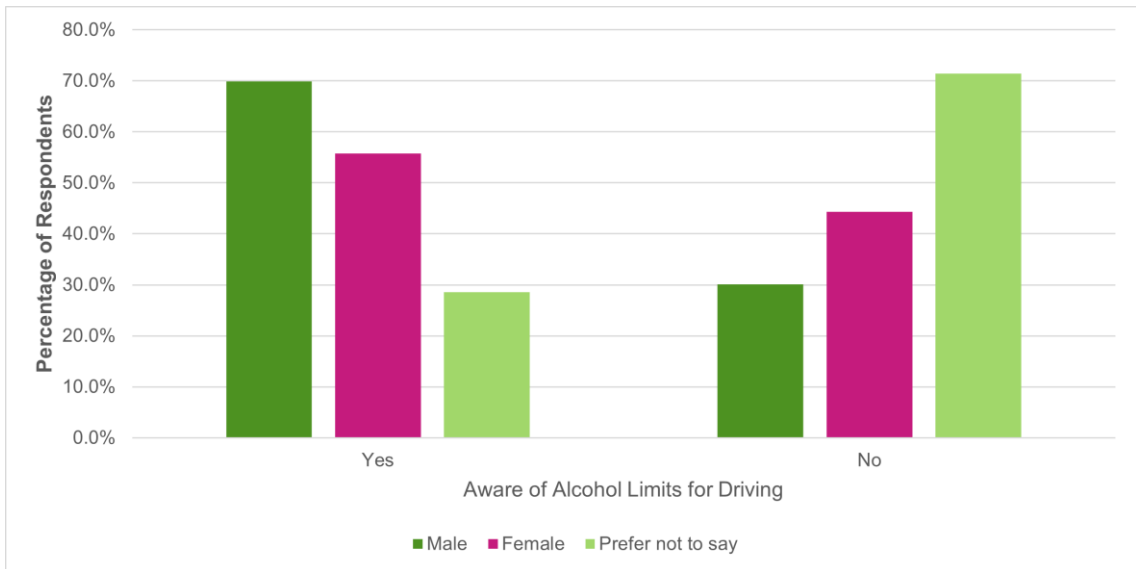


Figure 4-18 - Sex breakdown of awareness of legal limits for alcohol, n = 1153.

4.2.2 ILLEGAL DRUG ROAD USE

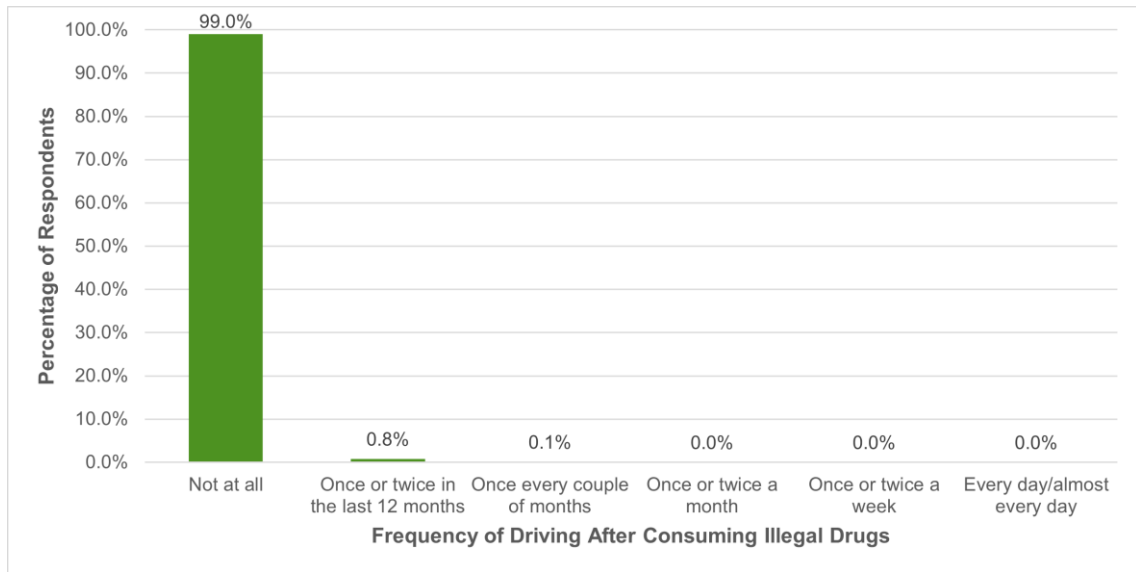


Figure 4-19 - Frequency of road use after consuming illegal drugs, n = 1153.

Figure 4-19 shows that almost all respondents reported never engage in road use after consuming illegal drugs. This figure is broadly consistent with the national statistics (0.4% of people self-reported driving after consuming illegal drugs.)⁴ From this same report, 5.4% of people indicated that they had consumed illegal drugs within the last year.

Table 4-2 – Frequency of road use under the influence of illegal drugs by type road use

| Vehicle | Frequency of Road Use After Using Illegal Drugs | | | | |
|---------------------|---|--------|-----------|-------|--------|
| | Never | Rarely | Sometimes | Often | Always |
| Car | 99.3% | 0.7% | 0.0% | 0.0% | 0.0% |
| Motorbike | 99.0% | 1.0% | 0.0% | 0.0% | 0.0% |
| Light Goods Vehicle | 99.1% | 0.0% | 0.9% | 0.0% | 0.0% |
| Heavy Goods Vehicle | 95.8% | 4.2% | 0.0% | 0.0% | 0.0% |
| Professional Driver | 100.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Cyclist | 98.9% | 0.9% | 0.0% | 0.0% | 0.2% |
| Pedestrian | 97.3% | 1.5% | 0.8% | 0.2% | 0.3% |

Table 4-2 shows the frequency of road use after consuming illegal drugs for each type of user, although the small sample size of professional drivers, LGVs, and HGVs remains true.

⁴ RAS51103 from [Reported drinking and driving: data tables - GOV.UK \(www.gov.uk\)](https://www.gov.uk/reported-drinking-and-driving-data-tables)

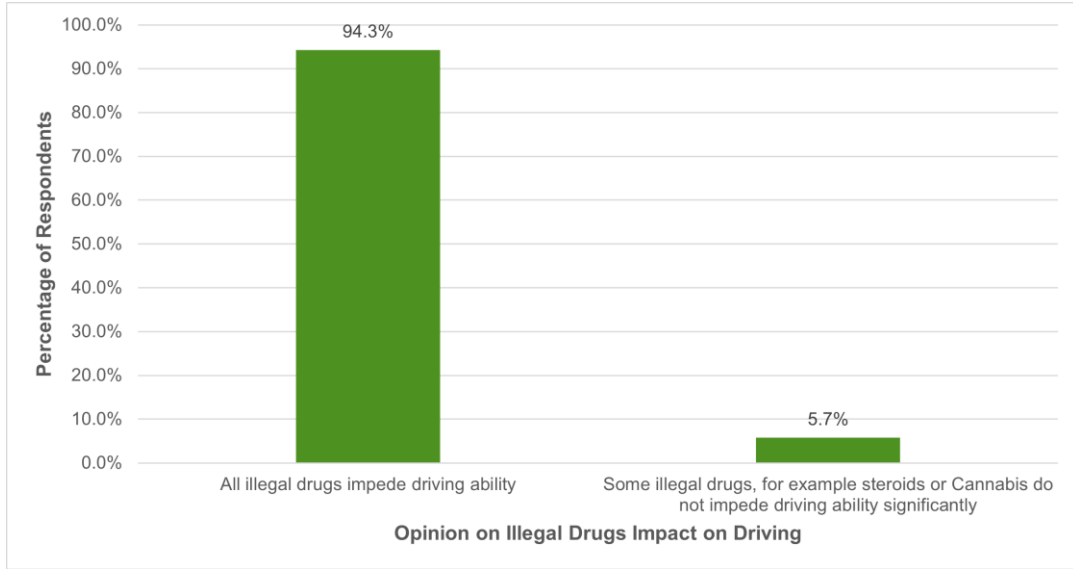


Figure 4-20 - Respondent opinion on the impact of illegal drugs on driving ability, n = 1149.

A very small proportion of respondents reported think that some illegal drugs such as steroids or cannabis do not significantly impede driving ability. As seen in Figure 4-21, Figure 4-22 and Figure 4-23 there does not appear to be a different in opinion of illegal drug use and driving be geographic area, age or sex.

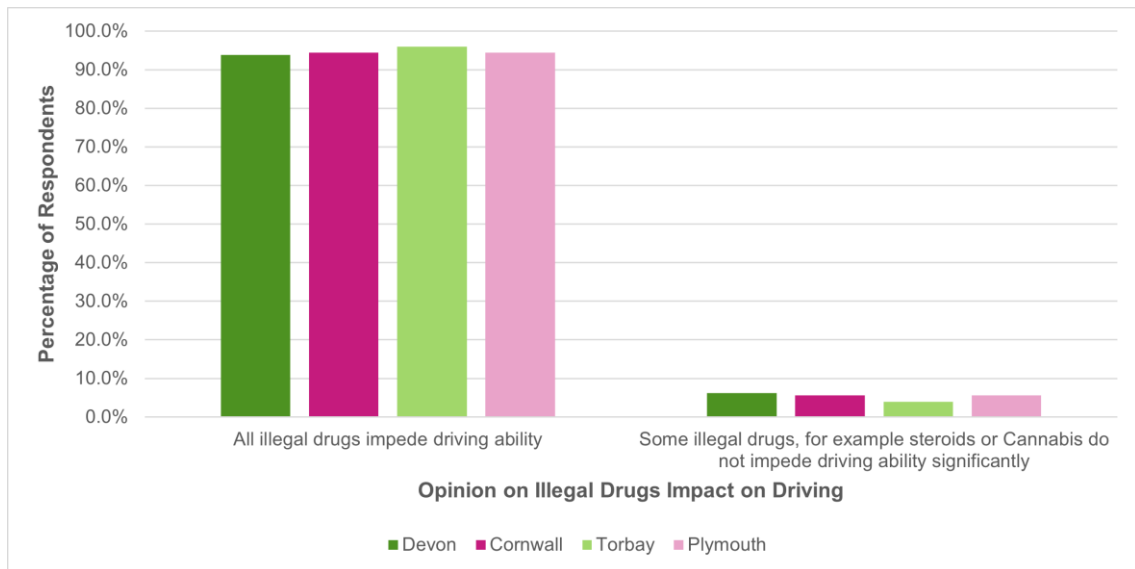


Figure 4-21 - Geographic breakdown of opinion on impact of illegal drug use, n = 1149.

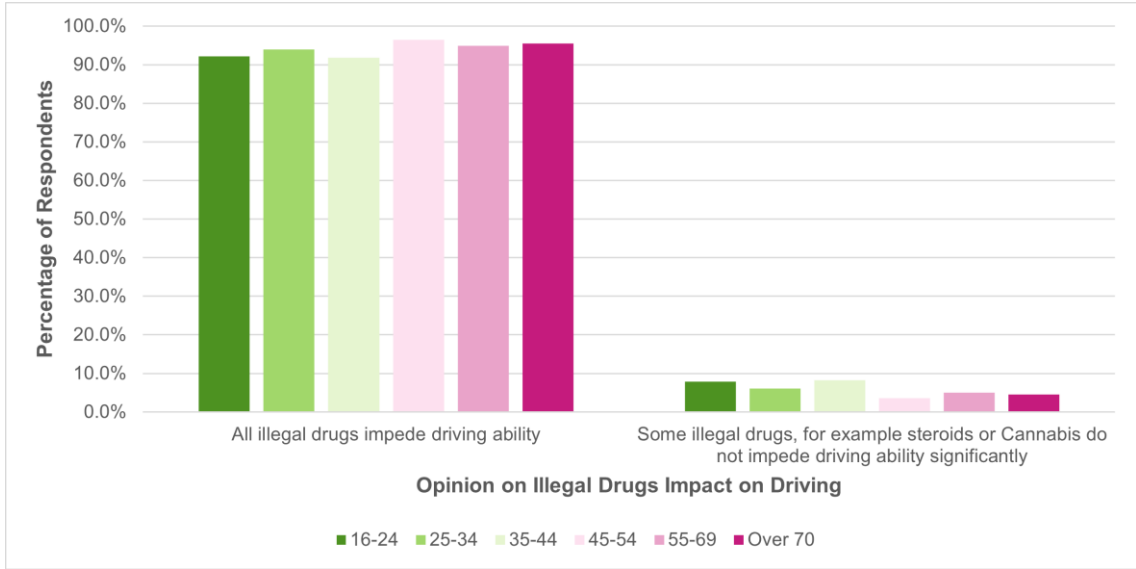


Figure 4-22 - Age breakdown of opinion on impact of illegal drug use, n = 1149.

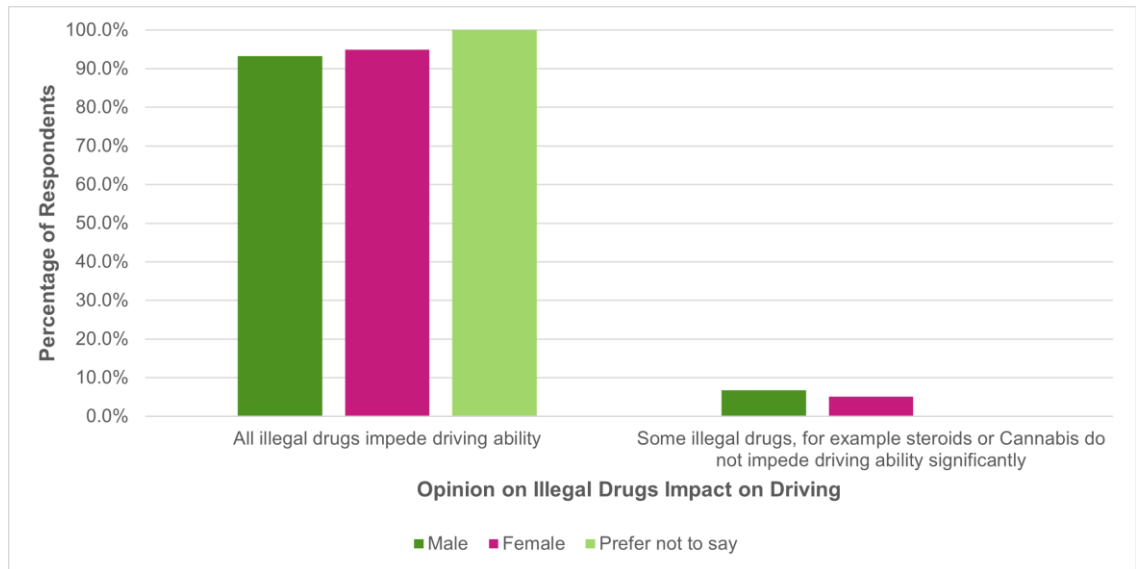


Figure 4-23 - Sex breakdown of opinion on impact of illegal drug use, n = 1149.

4.2.3 LEGAL HIGH⁵ ROAD USE

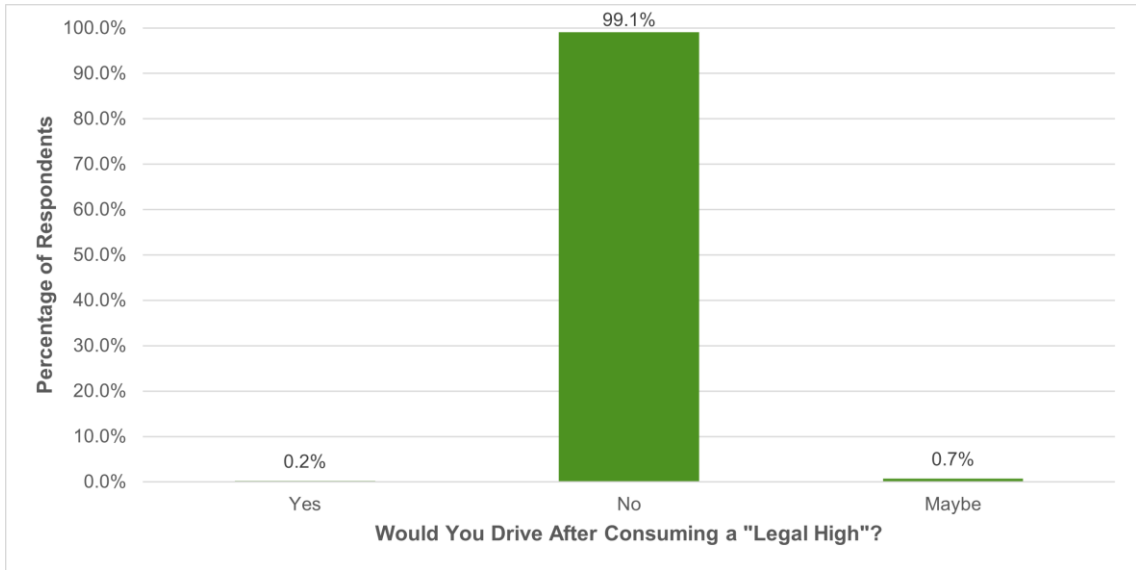


Figure 4-24 - Willing to use the road after consuming a "legal high", n = 1155.

Although not directly measured by a SPI, Figure 4-24 shows the willingness of respondents to use the road after consuming a “legal high” such as Nitrous Oxide, Benzodiazepines, or synthetic cannabinoids. The high level of unwillingness indicates that the legal state of the drugs in section 4.2.2 is not the only factor in stopping respondents from road use after consuming them and the impact of the drugs itself may be the more important factor. This data is consistent with national statistics which show that 99.7% of people do not self-report using any legal highs before driving.⁶

Table 4-3 – Frequency of road use under influence of “legal highs”.

| Road Use | Frequency of Road Use After Using Legal Highs | | | | |
|---------------------|---|--------|-----------|-------|--------|
| | Never | Rarely | Sometimes | Often | Always |
| Car | 99.8% | 0.1% | 0.1% | 0.0% | 0.0% |
| Motorbike | 99.0% | 1.0% | 0.0% | 0.0% | 0.0% |
| Light Goods Vehicle | 99.1% | 0.0% | 0.9% | 0.0% | 0.0% |
| Heavy Goods Vehicle | 95.8% | 4.2% | 0.0% | 0.0% | 0.0% |
| Professional Driver | 99.0% | 0.0% | 1.0% | 0.0% | 0.0% |
| Cyclist | 99.1% | 0.2% | 0.6% | 0.0% | 0.0% |
| Pedestrian | 99.2% | 0.5% | 0.2% | 0.0% | 0.1% |

⁵ The questions around willingness to use the road after consuming a legal high were asked before the law regarding possession of Nitrous Oxide changed in November 2023.

⁶ RAS51111 from [Reported drinking and driving: data tables - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/reported-drinking-and-driving-data-tables)



Table 4-3 shows the breakdown of results by road user type, indicating that use of legal highs is uncommon across all segments.

4.3 USE OF SEAT BELTS

4.3.1 DRIVER SEAT BELT USE

Respondents who were drivers were asked how frequently they wear a seat belt when driving. 1154 individuals responded to this question. The vast majority reported always wearing a seatbelt, with only 5 responding otherwise. This can be seen in Figure 4-25.

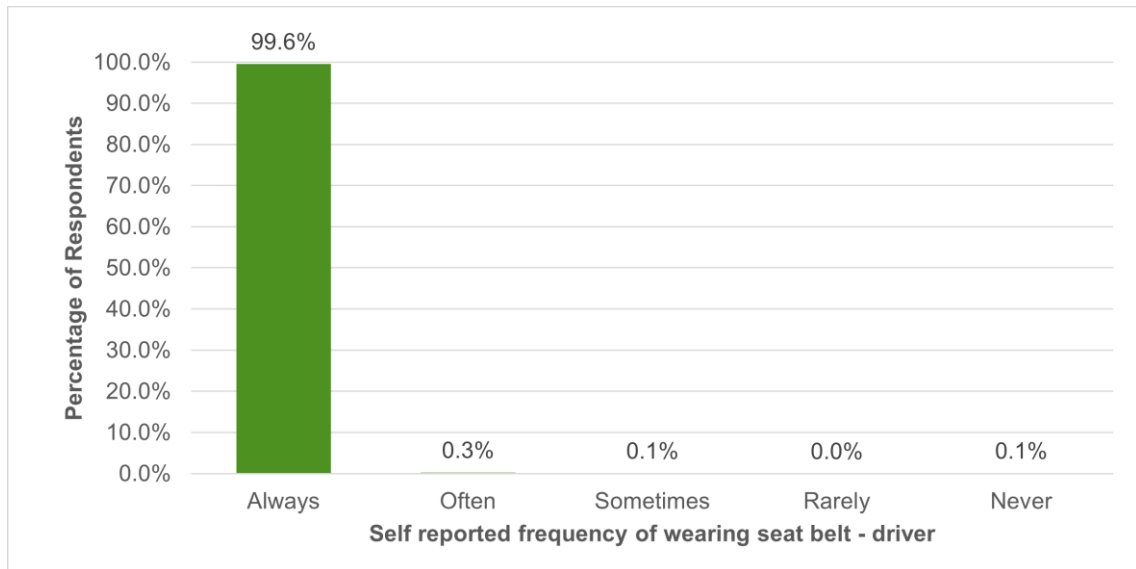


Figure 4-25 Driver seat belt use, n = 1154.

It should be noted that the self-reported proportion wearing seatbelts (99.6%) is significantly higher than the nationally observed proportion of drivers wearing seatbelts (94.8%⁷). It is considered that respondents self-reporting may overstate their likelihood to wear a seat belt.

4.3.2 PASSENGER SEAT BELT USE

A total of 807 people responded to this question, with similar results to those for drivers' use of seat belts, see Figure 4-26. 16 people responded that they did not always wear a seatbelt as a passenger.

⁷ DFT figures from [Seatbelt and mobile phone use surveys: 2021](#)

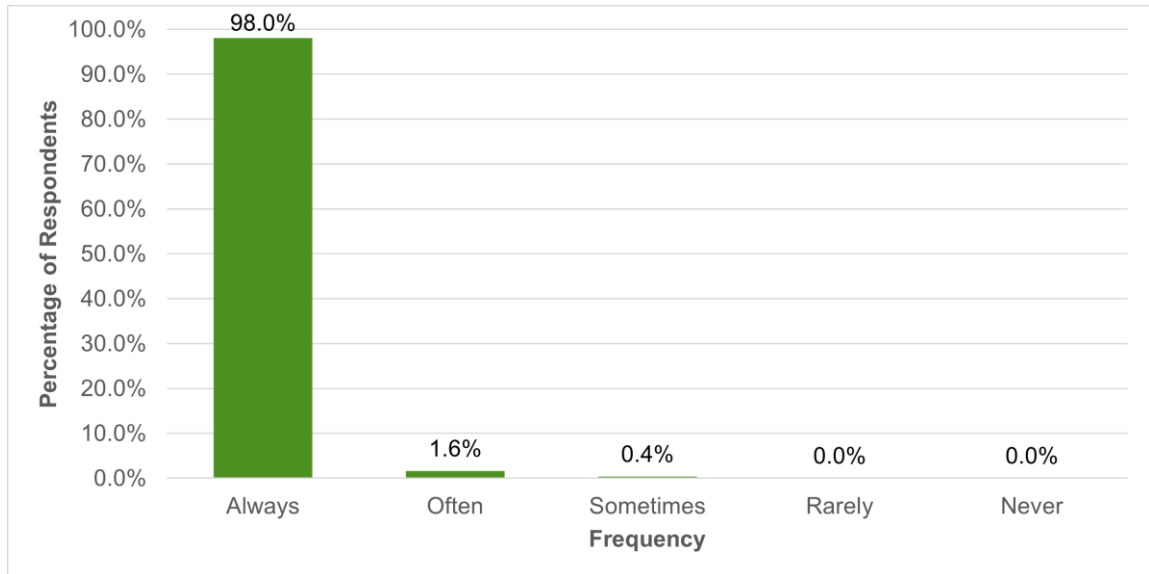


Figure 4-26 - Passenger seat belt use, n = 807.

4.3.3 REASONS GIVEN FOR NOT USING SEAT BELTS

As only a small number of respondents admitted to not always wearing a seat belt, these must be considered indicative rather than statistically representative of all views on non-seat belt use.

The following reasons options were selected:

- It is not comfortable
- I like the risk factor
- I worry about becoming trapped in my vehicle
- I don't wear it when I feel I am in low risk situations (e.g. once you are close to home / on very quiet roads / on very short trips)

Two 'other' entries can be summarised as relating to:

- Convenience
- Disapproval of 'constraints being forced upon us'

4.4 USE OF MOBILE PHONES

4.4.1 HANDHELD USE

1154 individuals responded to this question, selecting multiple answers. 149 (12.9%) admitted to using a handheld phone while driving, and a further 197 (17.1%) admitted to using a mobile phone on speakerphone whilst holding it in their hand or resting it on their person.

The distribution by age category is shown in Figure 4-27. Those aged between 24-44 were most likely to report using mobile phones held in hand than older categories.



Figure 4-27 - Handheld mobile use, n = 1154.

It should be noted that the self-reported proportion using mobile phones in hand or on speakerphone (12.9% and 17.1% respectively) are much higher than the proportion of drivers observed by a DFT study⁸ using a phone held to ear (0.6%) and phone held in hand (0.4%). It is important to note that those who reported using a phone while driving do not necessarily do this on all journeys or for all of any particular journey.

⁸ DFT figures from [Seatbelt and mobile phone use surveys: 2021](#)

Respondents who identified as particular types of road user were asked more specifically about frequency of “using a hand-held device (e.g. phone)”.

Table 4-4 – Frequency of using a hand-held device by road user type.

| Road User Type | Never | Rarely | Sometimes | Often | Always |
|---------------------|-------|--------|-----------|-------|--------|
| Car | 70.5% | 21.5% | 6.7% | 1.2% | 0.0% |
| HGV | 91.7% | 4.2% | 4.2% | 0.0% | 0.0% |
| LGV | 74.8% | 17.4% | 6.1% | 1.7% | 0.0% |
| Professional Driver | 77.9% | 10.6% | 10.6% | 0.0% | 1.0% |
| Motorcyclist | 95.0% | 4.0% | 1.0% | 0.0% | 0.0% |
| Cyclist – To Speak | 89.5% | 6.2% | 3.6% | 0.0% | 0.6% |
| Cyclist – To Text | 94.2% | 3.7% | 1.7% | 0.0% | 0.4% |
| Pedestrian | 6.9% | 15.3% | 27.3% | 23.0% | 27.4% |

4.4.2 HANDS-FREE PHONE USE

The proportion of drivers who claimed to use mobile phones, speaker phone, hands-free or none are shown in Figure 4-28 (all drivers) and Figure 4-29 (by driver age). Participants could indicate if they engaged in multiple types of use by selecting as many options as relevant.

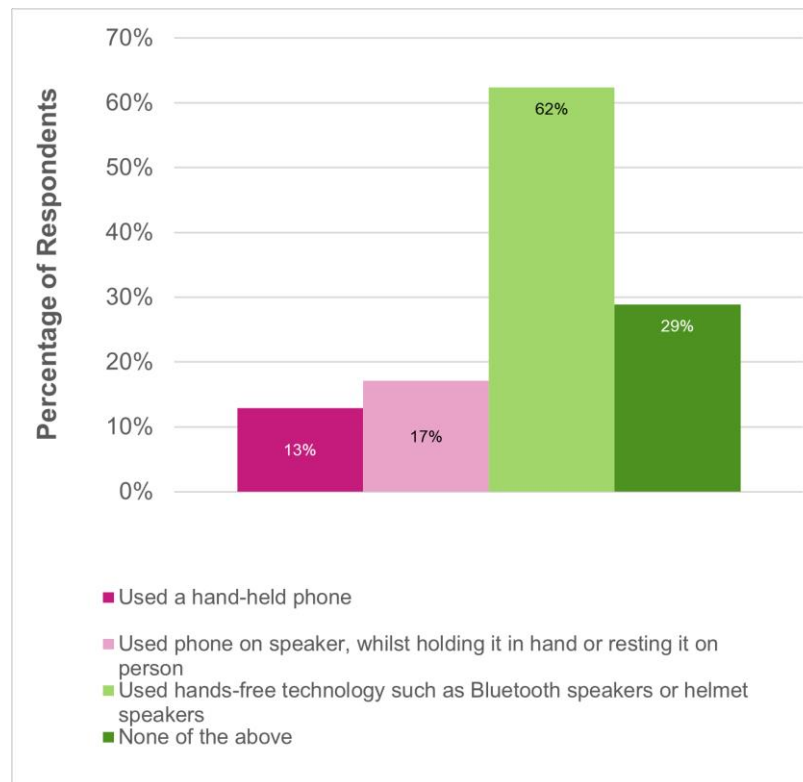


Figure 4-28 - Mobile use of all types, n = 1154.

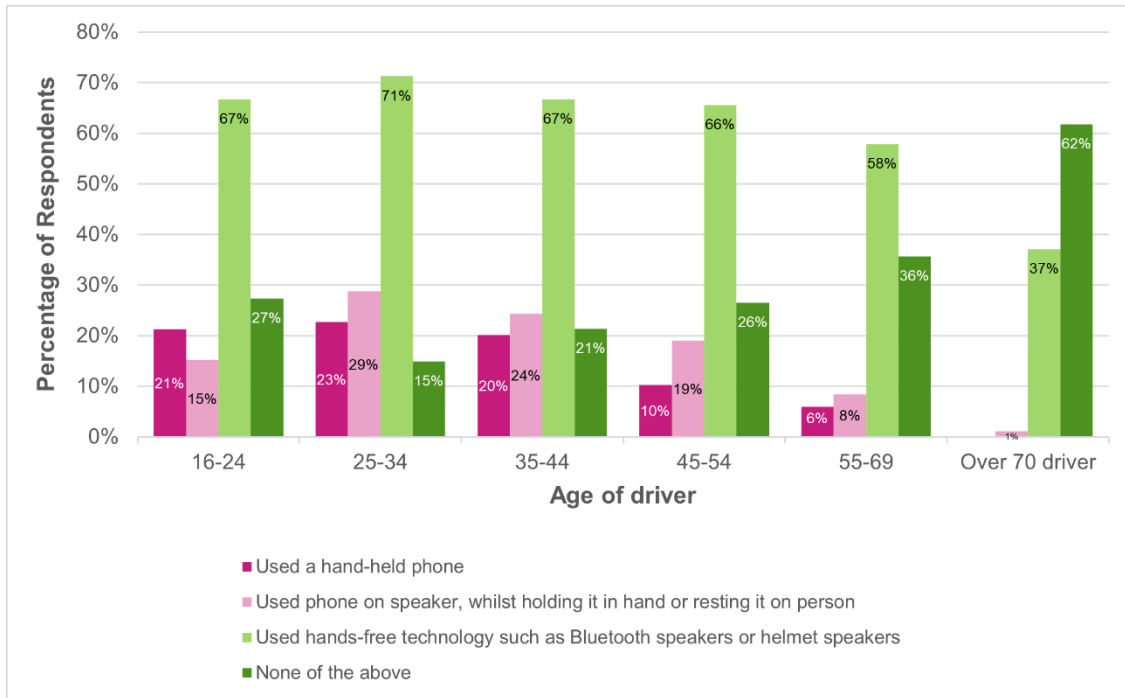


Figure 4-29 - Mobile phone use of all types by age group, n = 1154.

4.4.3 REASONS FOR PHONE USE

Respondents were asked to what extent they agree with statements giving reasons for using a mobile phone while driving. The results are shown in Table 4-5 which shows that the majority did not agree with any of the statements. While a number did agree with each statement, even added together they do not appear to account for the number of people who claimed to use mobile phones while driving.

Table 4-5 Potential reasons for phone use, n = 1140.

| Phone Use Reasons | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|---|-------------------|----------|---------|-------|----------------|
| Using my mobile phone while driving/riding doesn't distract me | 44.4% | 29.6% | 15.6% | 8.0% | 2.4% |
| I need to use my mobile phone while commuting or making long journeys to fill the time | 62.4% | 23.5% | 8.0% | 5.3% | 0.9% |
| I need to see notifications or calls that come through my mobile phone while driving / riding as I may need to respond fast | 58.6% | 23.6% | 10.7% | 6.2% | 0.9% |
| I am expected to use handsfree phone calls whilst travelling for work | 60.6% | 16.6% | 13.4% | 6.2% | 3.3% |
| My employer has a policy against using mobile phones (even handsfree) when driving for work | 20.4% | 10.9% | 38.1% | 10.1% | 20.6% |

Respondents were also asked if their employers had a policy against using mobile phones (even handsfree) when driving for work. While a significant number did agree, a similar number disagreed. This can be seen in Figure 4-30.

This can be compared with the above chart, indicating that while a significant proportion of people are not actively pressured to take calls whilst travelling for work, they are also not actively discouraged.

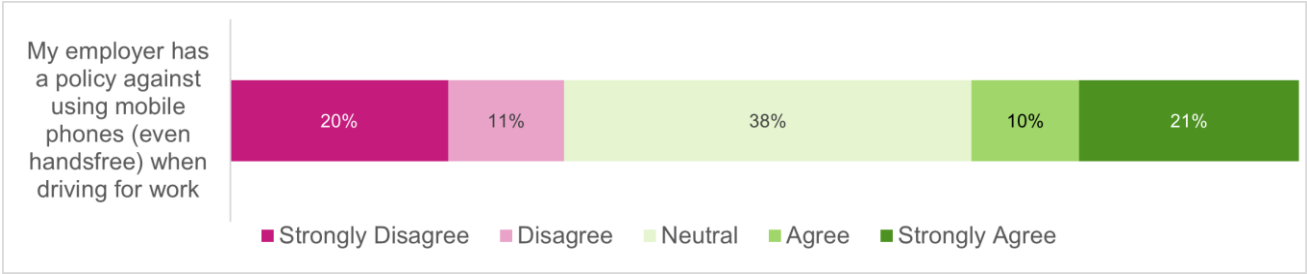


Figure 4-30 - Employer policy, n = 1123.

4.5 MOTORCYCLIST USE OF PERSONAL PROTECTIVE EQUIPMENT (PPE)

99 survey respondents identified themselves as being motorcycle users.

4.5.1 USE OF HELMETS

Of the 99, 100% reported that they used a helmet. The majority of these believed the helmet met the relevant requirements, but a significant minority use helmets that are more than five years old. This can be seen in Figure 4-31.

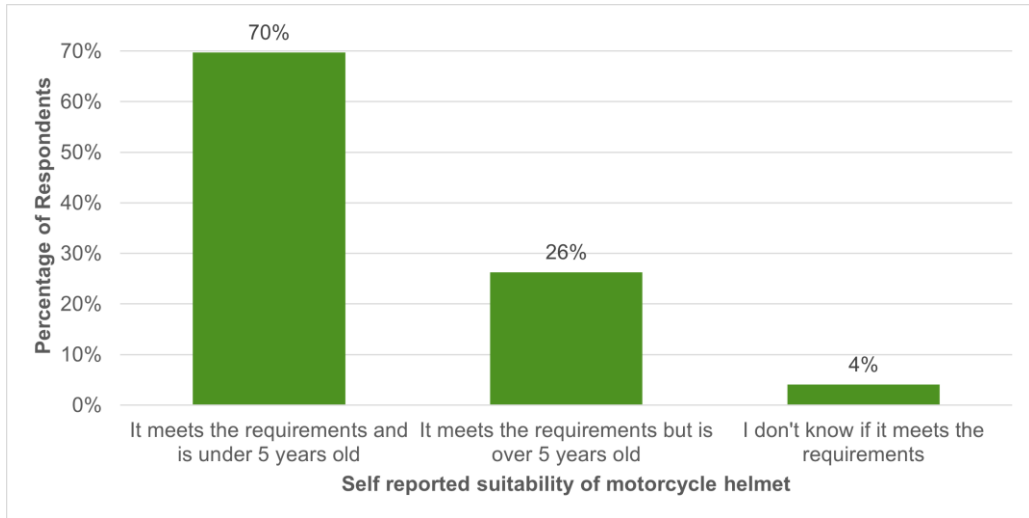


Figure 4-31 - Motorcycle helmets, n = 99.

4.5.2 ALL PPE

Helmets were the most used item of PPE, in line with the legal requirement to wear a helmet (unless religiously exempt). Respondents made use of other PPE as shown in Figure 4-32. Full PPE was not specifically asked within the question, it is defined as the proportion who used helmet and armoured jacket, gloves, boots, and trousers.

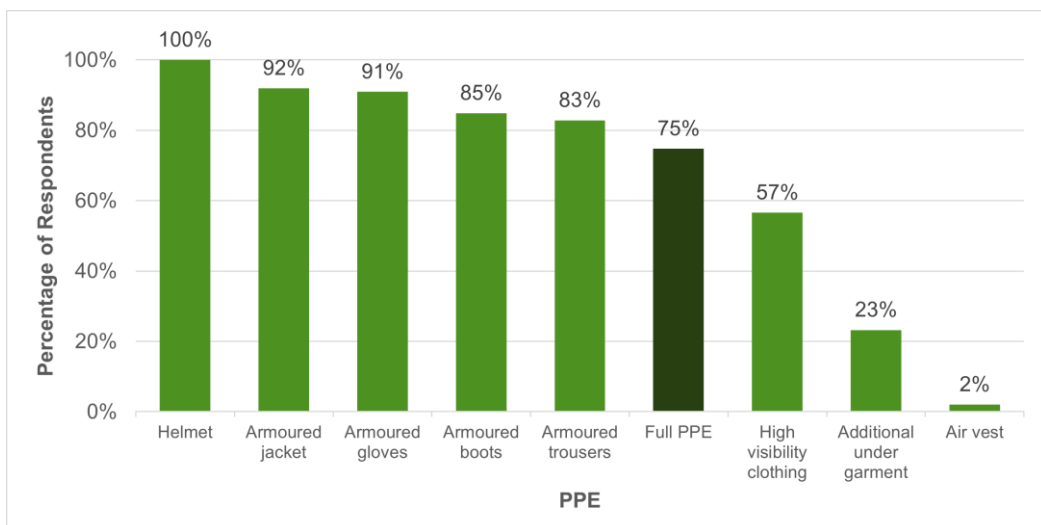


Figure 4-32 - Motorcycle PPE, n = 99.

5 OTHER SURVEY FINDINGS

5.1 ROAD TRAFFIC COLLISIONS

Road traffic collisions (RTCs) were explored by user group in the survey. Table 5-1 shows the detailed breakdown of the types of RTCs that respondents had encountered. Pedestrians, eScooter users and HGV drivers reported the highest frequency of not being involved in road traffic collisions (worth noting that only 32 people responded as eScooter users). Regarding near misses, these seem to be more prevalent in car, bicycle and motorcycle users. Bicycle and motorcycle users were also more likely to be forced off the road by other vehicles and be involved in accidents not involving other road users. Collisions with motorised vehicles were highest for car drivers.

“Other” reasons provided typically seemed to include unexpected obstacles presenting themselves to the road users, these included hedging and foliage, collisions with wild animals or unforeseen obstacles in the road.

Table 5-1 - Road Traffic Collisions by road user type

| Collision Type | Road User Type | | | | | |
|--|----------------|-------|-----------|----------|-------|------------|
| | Car | HGV | Motorbike | eScooter | Bike | Pedestrian |
| Collision with a motorised vehicle | 44.5% | 20.8% | 19.2% | 0.0% | 12.1% | 2.8% |
| Collision with a bicycle | 2.5% | 4.2% | 0.0% | 3.1% | 4.1% | 2.8% |
| Accident not involving another road user | 12.9% | 0.0% | 20.2% | 9.4% | 14.0% | 1.4% |
| Collision with a stationary vehicle | 6.3% | 0.0% | 3.0% | 3.1% | 4.3% | 1.0% |
| Forced off the road by other vehicles | 15.8% | 20.8% | 26.3% | 9.4% | 24.6% | 10.4% |
| Collision involving a pedestrian | 0.7% | 0.0% | 3.0% | NA | 1.9% | 2.0% |
| Had a near miss | 64.3% | 33.3% | 60.6% | NA | 51.4% | 32.2% |
| None of the above | 17.6% | 45.8% | 26.3% | 78.1% | 39.5% | 61.1% |
| Other | 1.4% | 4.2% | 5.1% | 6.3% | 1.3% | 1.1% |

5.2 EXPERIENCE OF VULNERABLE ROAD USER GROUPS

5.2.1 OVER 70S

Distances driven

Figure 5-1 shows the annual miles reported driven by car for all drivers and for over 70 drivers. While over 70 drivers were likely to drive fewer miles than younger drivers, this was not universal.

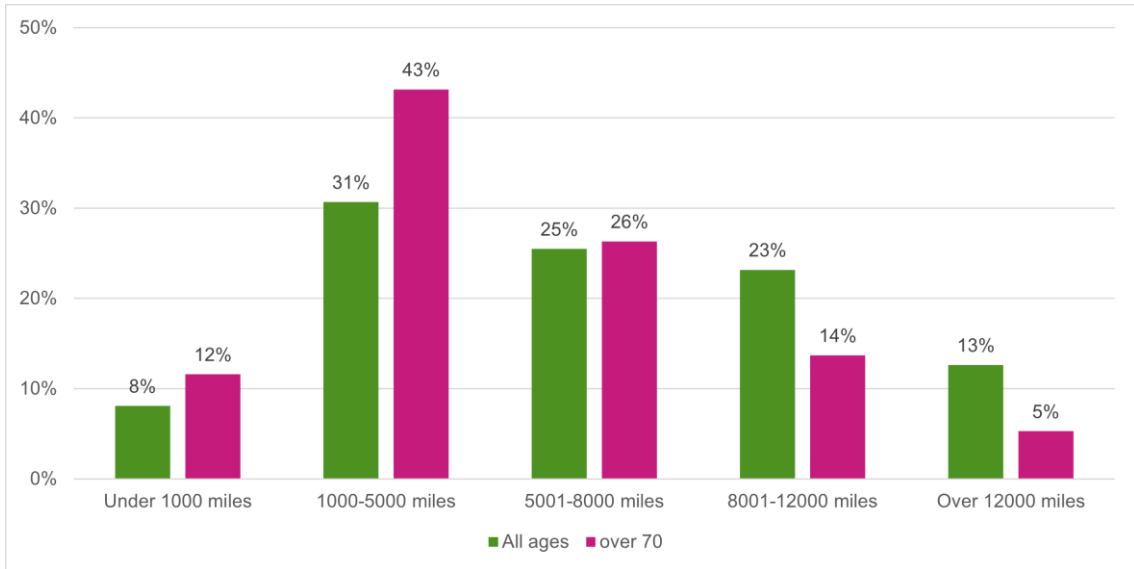


Figure 5-1 - Comparison of Over 70 driver mileage to all ages.

Treatment of older drivers

Drivers over 70 were asked if they experienced different treatment to other drivers. Only a minority reported that they did, as shown in Figure 5-2.

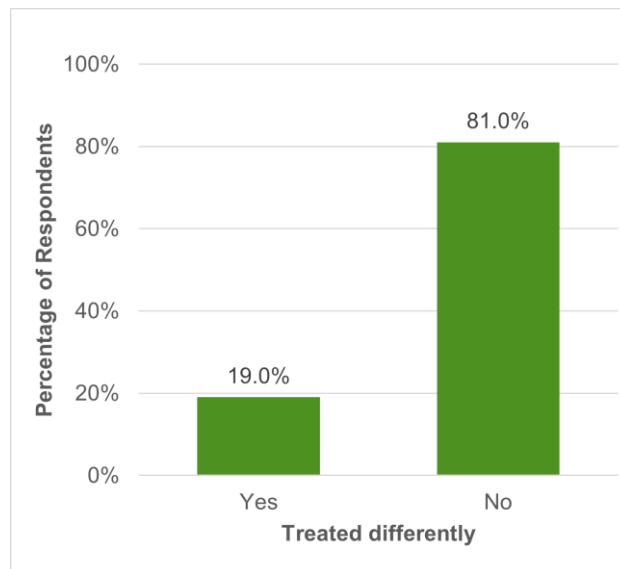


Figure 5-2 - Older driver perception of treatment, n=100.

Of those who had experienced different treatment, the following treatment was noted in Figure 5-3.

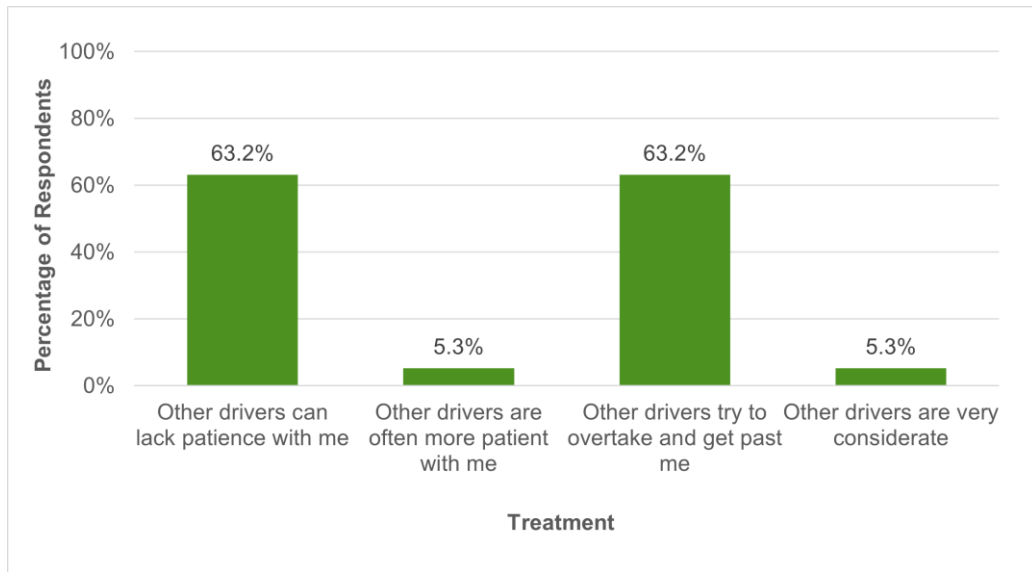


Figure 5-3 - Treatments experienced by older drivers, n=100.

Changed behaviour of over 70 drivers

Over 70 drivers were asked if they had changed their driving behaviour and offered a range of options for ways in which this may have been the case. 47% answered that they had not changed their behaviour. The proportion agreeing with each statement is shown in Figure 5-4. Note that some respondents selected multiple options.

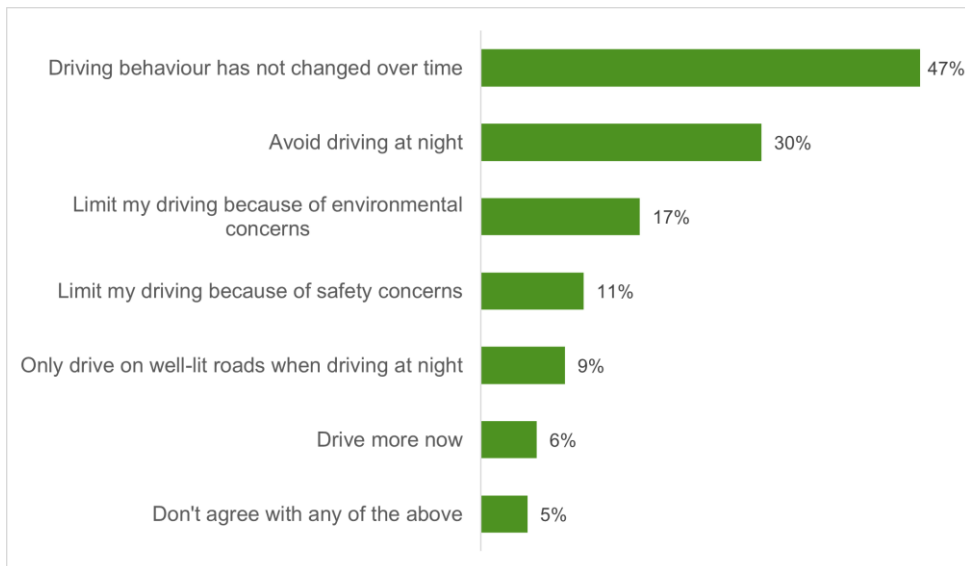


Figure 5-4 - Behaviour of over 70 drivers, n=100.

5.2.2 PEDESTRIANS

Figure 5-5 shows the journey types made by pedestrians. The most frequent reason for travelling by foot in the region was for leisure purposes.

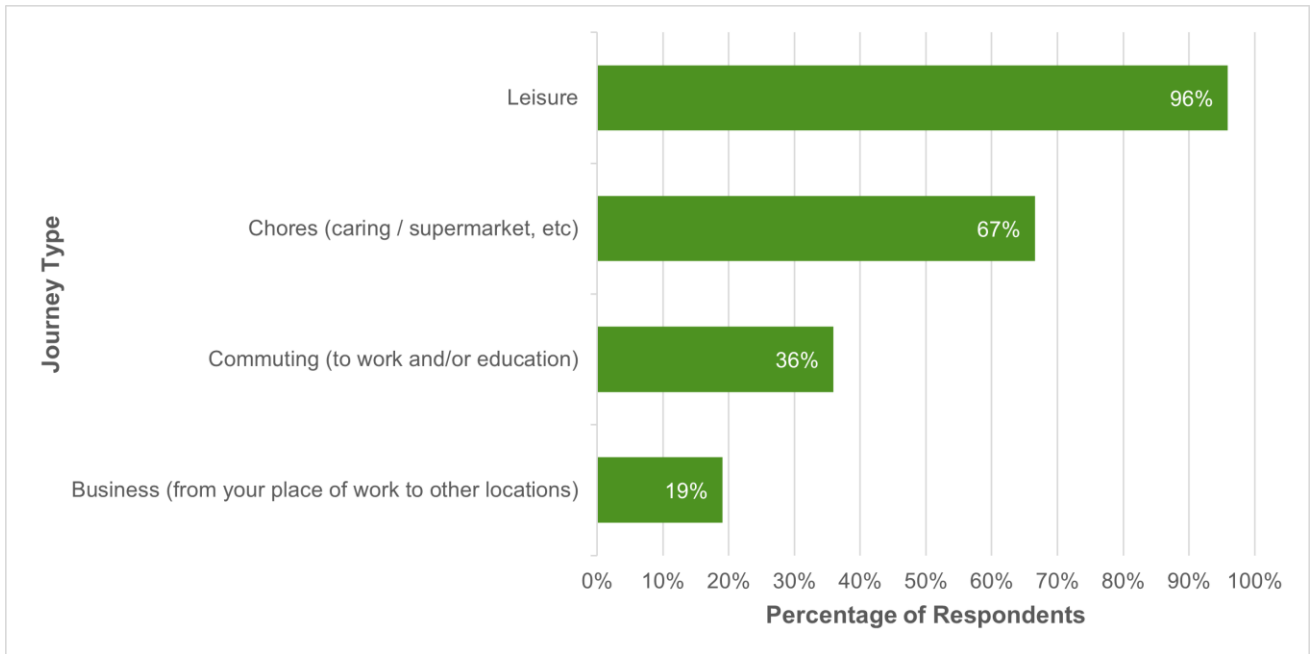


Figure 5-5 - Journey types of pedestrians, n = 1340.

Respondents were asked how often they had carried out various behaviours whilst walking. Results around road traffic collisions, use of alcohol or drugs, and mobile phone use have been combined in their relevant sections, while Figure 5-6 shows the result of an additional question asked of them.

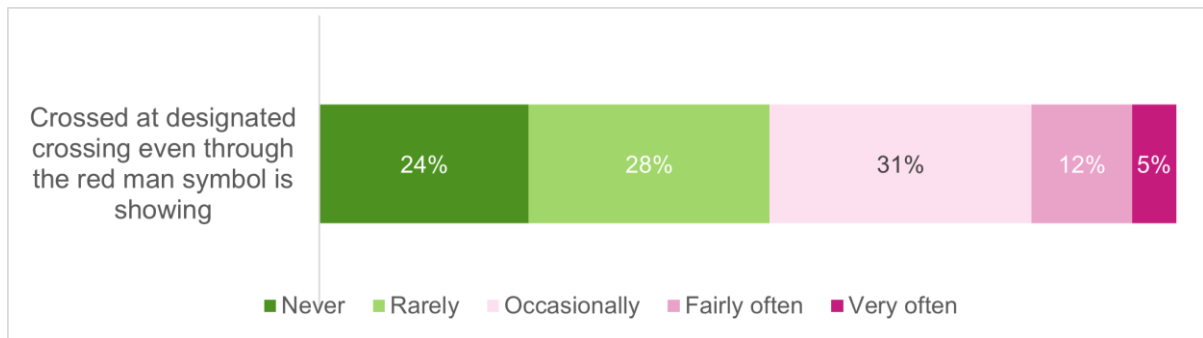


Figure 5-6 - Behaviour of pedestrians, n = 1275.

Table 5-2 shows how frequently pedestrians engage in behaviours relevant to the SPIs discussed in section 4.

Table 5-2 – Behaviours of pedestrians, n = 1275.

| Behaviour | Never | Rarely | Occasionally | Very often | Fairly often |
|---|-------|--------|--------------|------------|--------------|
| Held a hand-held mobile phone | 7% | 15% | 27% | 23% | 27% |
| Used headphones | 44% | 12% | 14% | 17% | 13% |
| Been under the influence of alcohol | 51% | 28% | 19% | 0% | 2% |
| Been under the influence of illegal drugs | 97% | 1% | 1% | 0% | 0% |
| Been under the influence of "legal highs" | 99% | 1% | 0% | 0% | 0% |

5.2.3 CYCLISTS

Cyclists were asked to rate how self they felt travelling on the roads of Devon and Cornwall as cyclists, Figure 5-7 shows that this is unevenly distributed. 47% responded with somewhat or very unsafe.

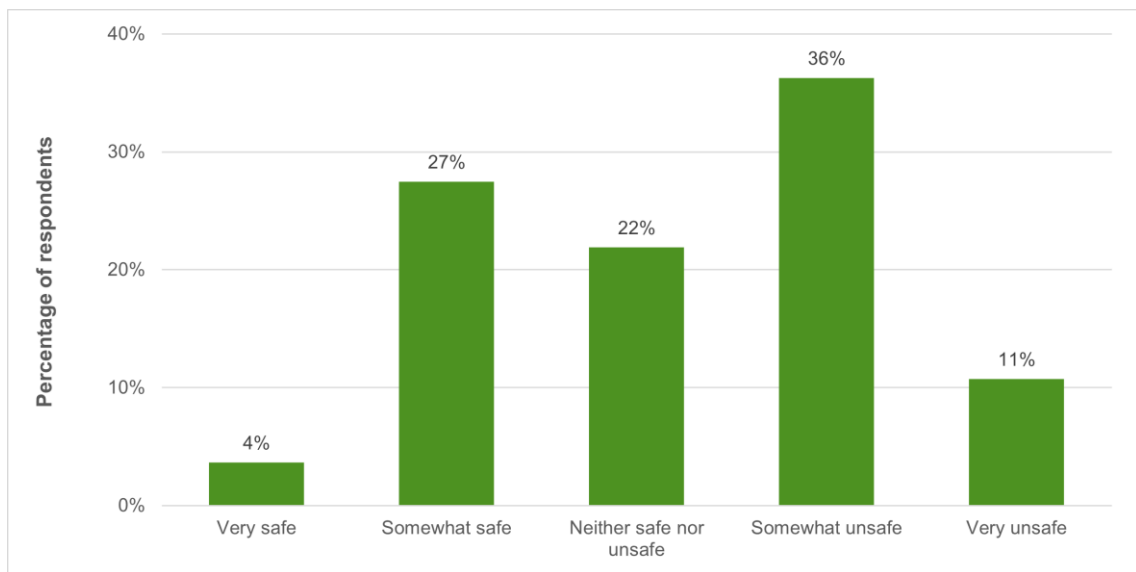


Figure 5-7 – Self rated safety as cyclists in the region, n = 466.

Cyclists were asked which safety concerns they had experienced. Figure 5-8 shows the proportion of respondents who selected each option.

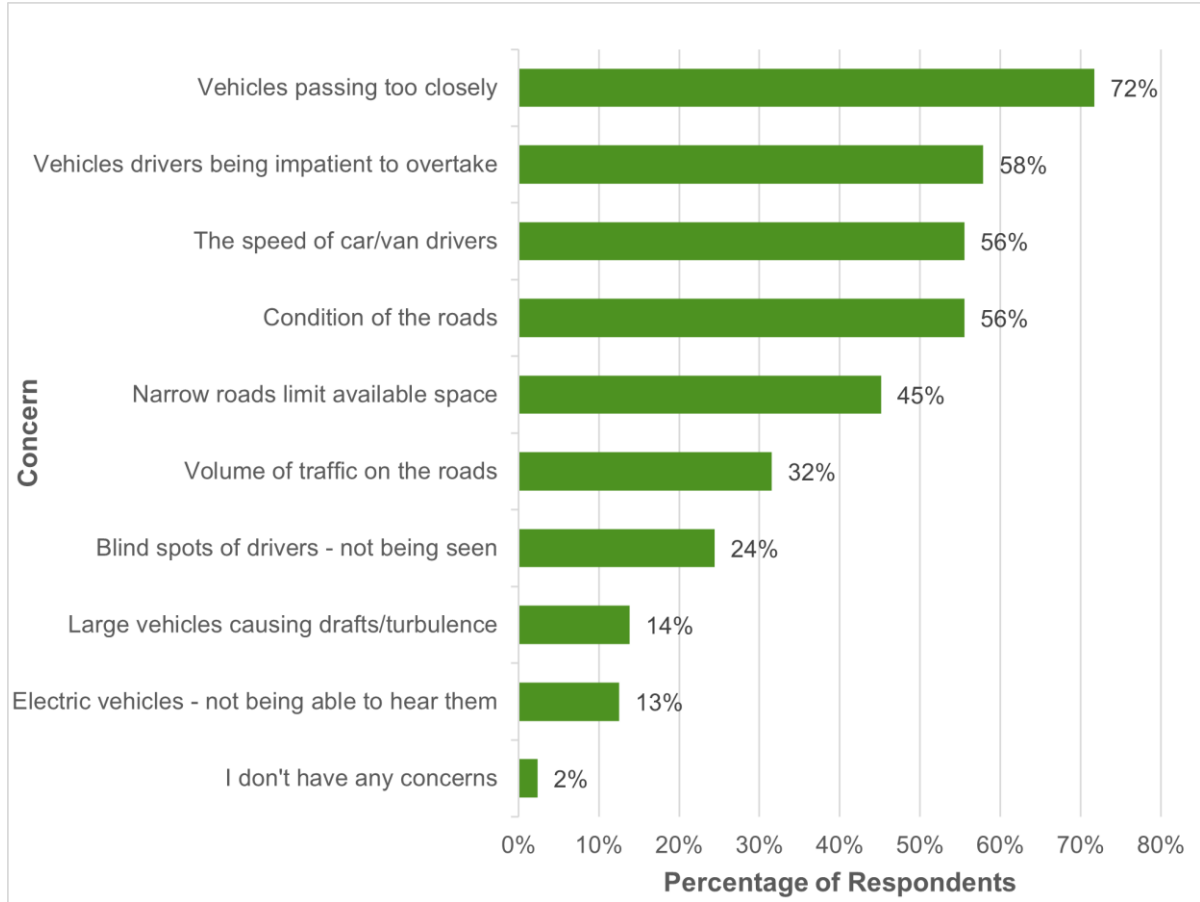


Figure 5-8 – Concerns experienced as cyclists, n = 466.

Cyclists were also asked what safety gear they wore whilst cycling on the roads in Devon & Cornwall. Most cyclists wore a helmet, whilst use of hi-vis and safety cameras was more mixed. Front and rear bike lights were the preferred type of light amongst those who used any lights, however 18% of respondents used no lights at all.

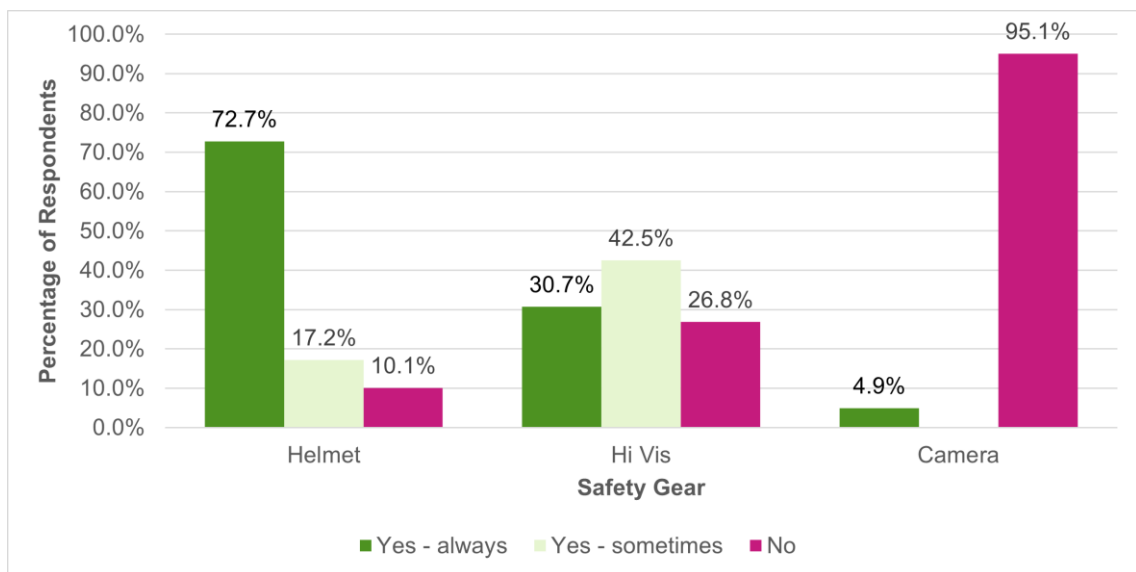


Figure 5-9 - Safety gear worn by cyclists within Devon & Cornwall, n = 466.

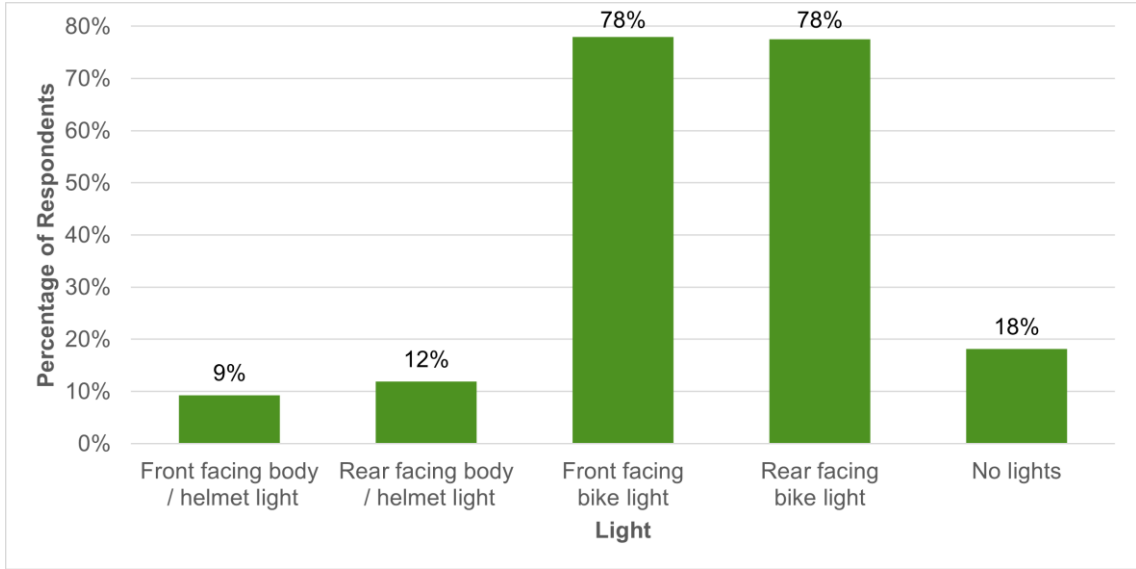


Figure 5-10 - Lights worn by cyclists within Devon & Cornwall.

Cyclists were asked how often they had carried out certain behaviours while cycling, **Table 5-3**. Results around road traffic collisions, use of alcohol or drugs, and mobile phone use have been combined in their relevant sections. This data combined with Figure 5-10 suggests that those who report using no lights do not cycle in the dark.

Table 5-3 – Cyclist behaviours within the last year, n = 466.

| Behaviour | Never | Rarely | Occasionally | Very often | Fairly often |
|--------------------------------|-------|--------|--------------|------------|--------------|
| Not worn a cycle helmet | 59.0% | 14.4% | 9.4% | 11.6% | 5.6% |
| Not used lights when it's dark | 80.9% | 13.8% | 2.4% | 2.2% | 0.9% |
| Gone through a red light | 83.0% | 10.3% | 4.7% | 0.6% | 1.3% |

5.3 EXPERIENCES OF PROFESSIONAL DRIVERS

106 respondents indicated that they drove professionally. Figure 5-11 shows the frequency at which drove professionally on the roads of Devon & Cornwall. The additional responses resulted from participants who did not answer if they drove professionally, although they did not respond to other questions within the professional driver section.

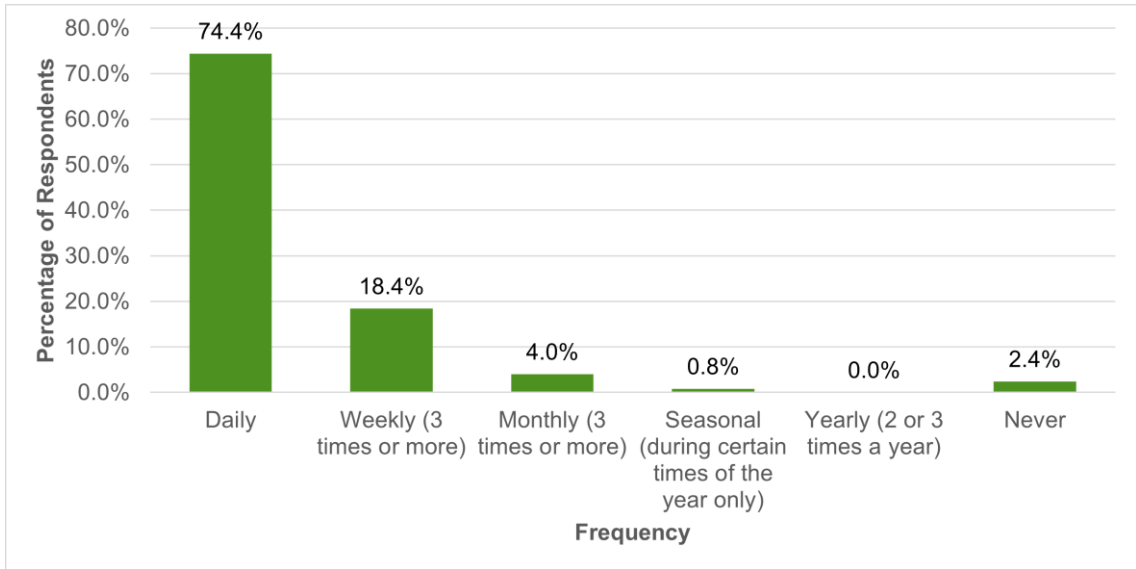


Figure 5-11 - Professional Driver frequency of driving within Devon & Cornwall, n = 125

The professional drivers were asked to indicate if any of the experiences shown in applied to them within the last 12 months of their professional driving. Whilst none were experienced by a majority of participants, driving whilst tired, stressed, or under time pressure is associated with poor driving and an increase in traffic collisions.

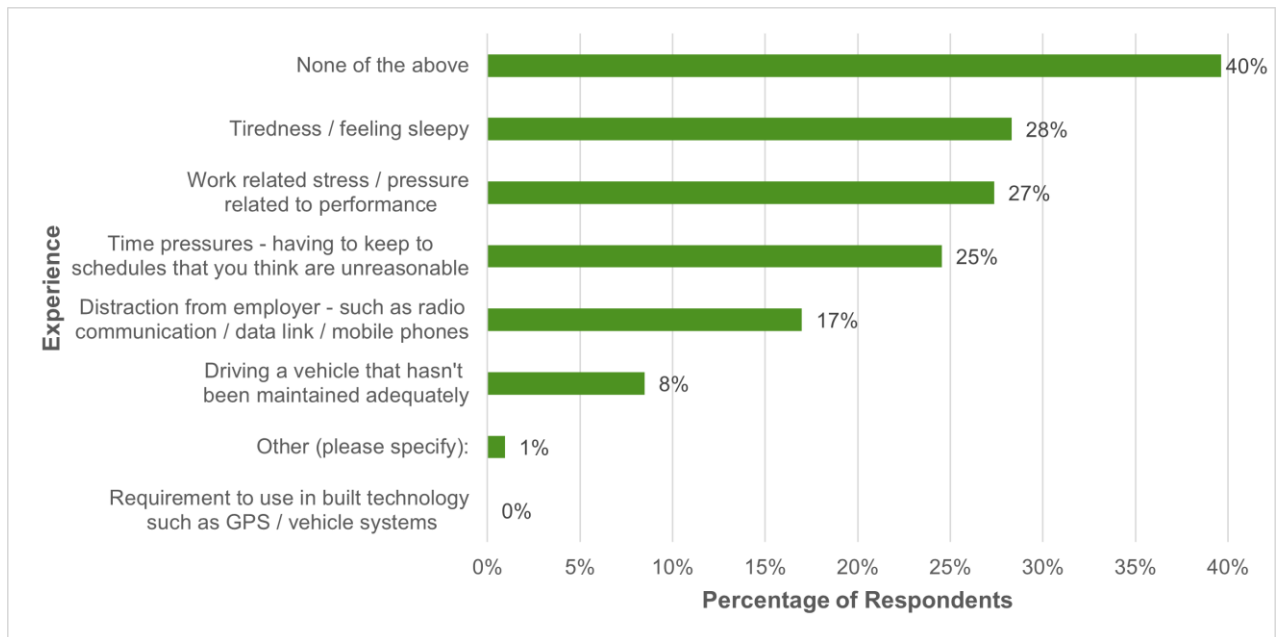


Figure 5-12 - Experiences of professional drivers within the last 12 months, n = 106

5.4 ATTITUDES TOWARDS PUBLIC TRANSPORT

As shown in Figure 5-13 self-reported use of public transport was low, with 66% of respondents suggesting that they rarely or never used public transport. Figure 5-14 highlights respondents' reasoning for not using public transport, the two most frequently cited factors were a preference for using other modes of transport and limited availability of public transport.

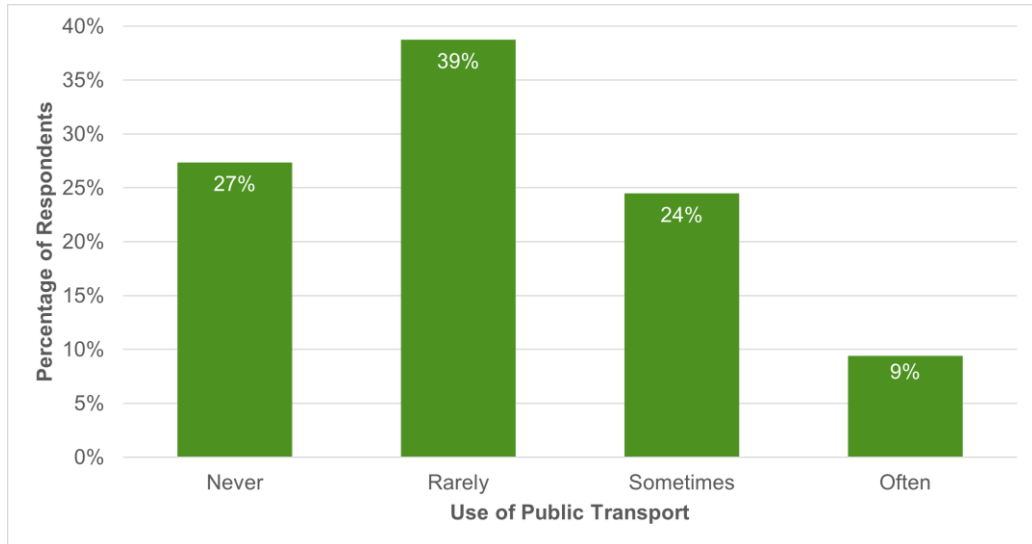


Figure 5-13 - Current use of public transport, n = 1352.

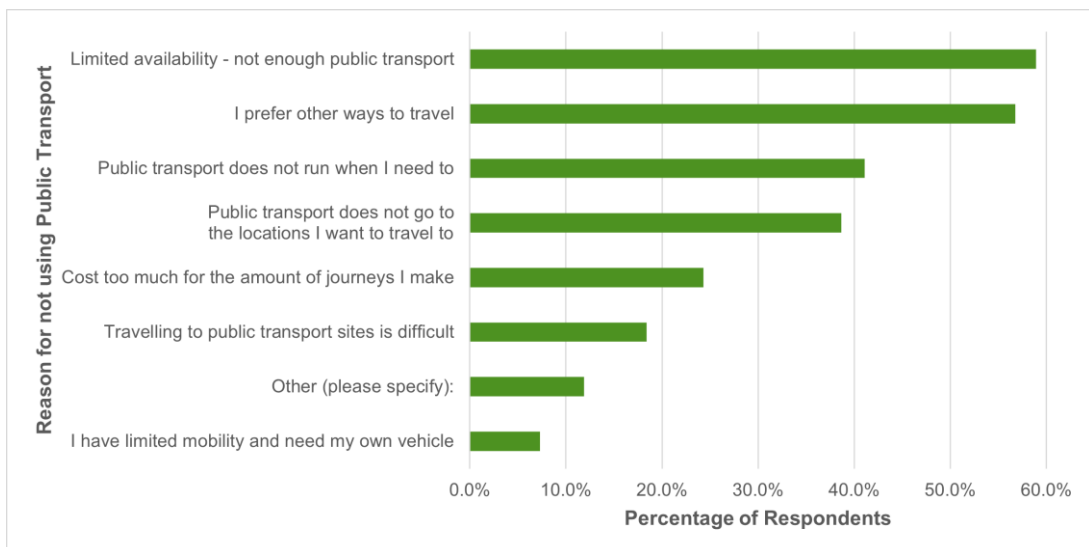


Figure 5-14 - Respondent reasons for not using public transport, n = 1352.

“Other” reasons provided in free text boxes can be summarised as:

- Social anxiety or autism.
- Rural location.
- Increased journey times compared to self-driving.
- Reliability.

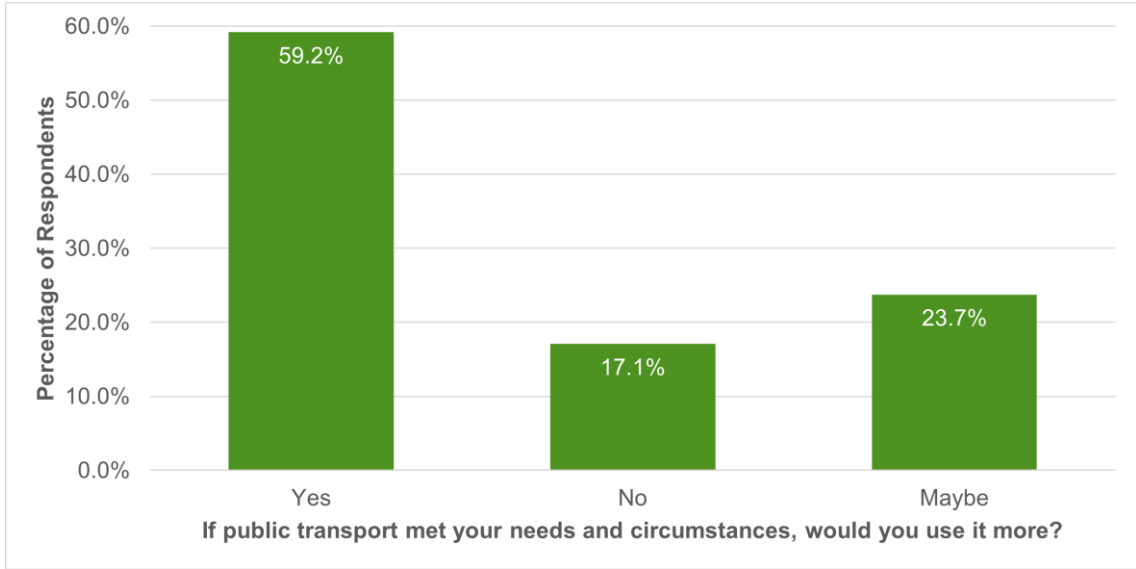


Figure 5-15 - Willingness to increase use of public transport, n = 1352.

Figure 5-15 shows that if public transport met user needs, almost 60% of respondents said that they would use it, and almost 24% said they might. Table 5-2 shows that almost 40% of respondents who said that they currently never used public transport would increase their use of public transport if it could meet their needs.

Table 5-4 - Cross-tabulation of current public transport use against willingness to increase use, n = 1352.

| Increased Use | Current Use | | | |
|---------------|-------------|--------|-----------|-------|
| | Never | Rarely | Sometimes | Often |
| Yes | 39.3% | 55.4% | 76.7% | 85.8% |
| No | 31.7% | 14.9% | 7.6% | 8.7% |
| Maybe | 29.0% | 29.6% | 15.7% | 5.5% |

5.5 AWARENESS OF THE VZSW PARTNERSHIP

Participants were asked if they were familiar with both the VZSW Partnership and Operation Snap, see Figure 5-16. These results indicate there is a substantial lack of awareness of both initiatives – despite the 26.1% of respondents that were sourced using the VZSW Partnership social media, only 11.9% of respondents felt confident enough to describe it. This did improve for Operation Snap to 15.3%, although the overall level of familiarity was lower.

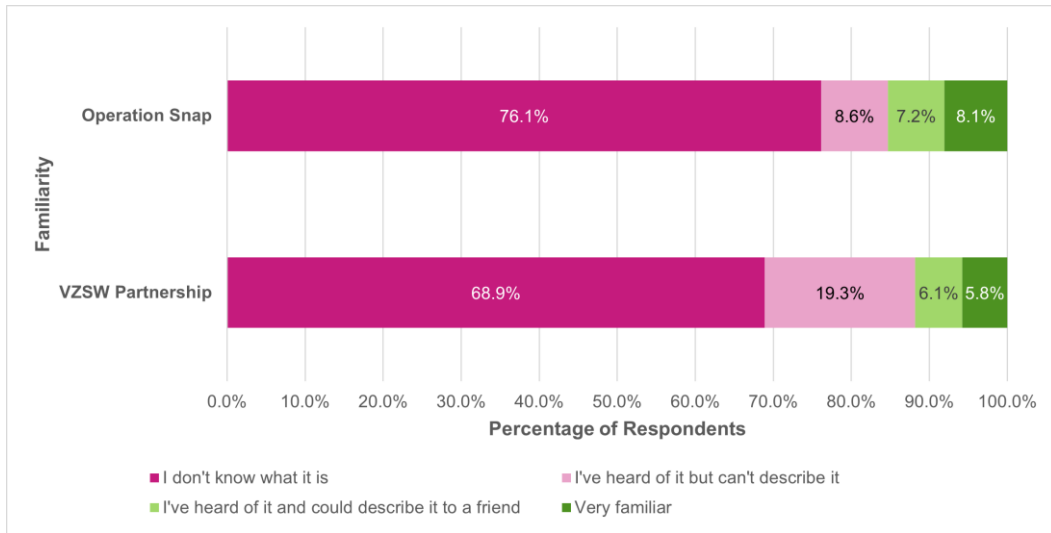


Figure 5-16 - Familiarity with the Vision Zero Southwest Partnership and Operation Snap, n=1353.

These results are broken down by how the participants were directed to the survey in Table 5-5 and Table 5-6.

Table 5-5 – Familiarity with VZSW by engagement mechanism, n = 1353.

| Engagement Mechanism | Familiarity | | | |
|----------------------|-------------------------|--|--|---------------|
| | I don't know what it is | I've heard of it but can't describe it | I've heard of it and could describe it to a friend | Very familiar |
| Panel Provider | 79.0% | 18.4% | 1.8% | 0.8% |
| VZSW Social Media | 57.2% | 17.3% | 11.6% | 13.9% |
| Further Outreach | 63.3% | 22.6% | 7.9% | 6.3% |

Table 5-6 - Familiarity with Operation Snap by engagement mechanism, n = 1353.

| Engagement Mechanism | Familiarity | | | |
|----------------------|-------------------------|--|--|---------------|
| | I don't know what it is | I've heard of it but can't describe it | I've heard of it and could describe it to a friend | Very familiar |
| Panel Provider | 85.3% | 8.4% | 4.2% | 2.1% |
| VZSW Social Media | 61.2% | 9.9% | 11.0% | 17.8% |
| Further Outreach | 75.1% | 7.6% | 8.7% | 8.7% |

As could be expected, participants who accessed the survey through VZSW social media had more awareness of what VZSW and Operation Snap were. However, even through this channel, participants were more likely to have no awareness than any awareness.

Those who indicated that they had any level of awareness of Operation Snap were also asked if they had made use of the platform, see Figure 5-17. Only 18% of those aware of the platform had used it.

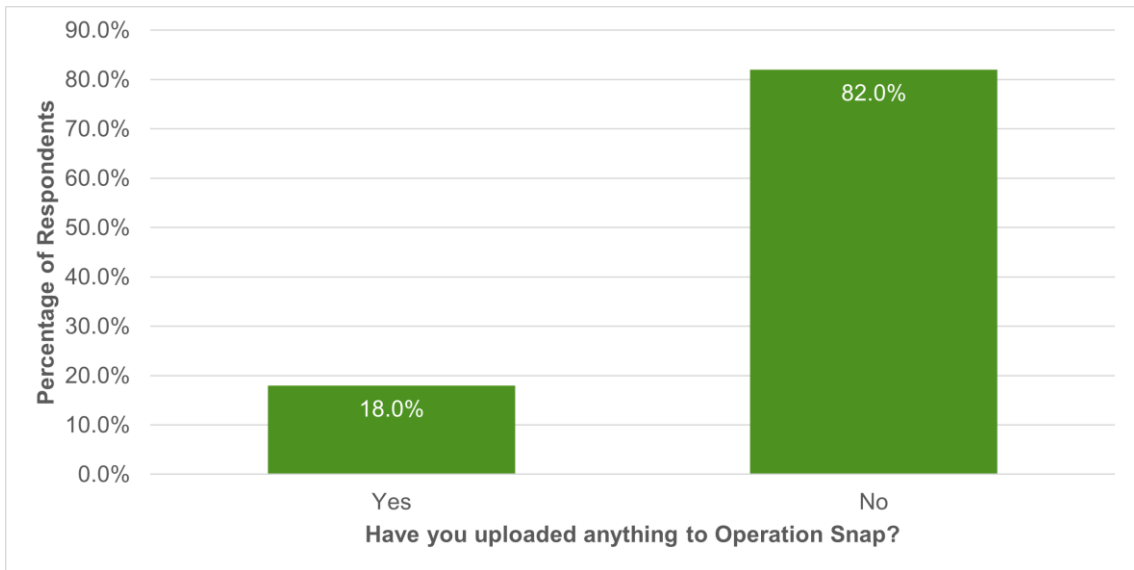


Figure 5-17 - Use of Operation Snap, n = 289.

6 CONCLUSIONS AND RECOMMENDATIONS

Considering the VZSW partnerships Safety Performance Indicators, the following conclusions can be drawn from the data:

Compliance with speed limits

Generally, respondents self-reported that they rarely speed on both national and local roads but were less likely to speed on local roads. However, the proportion that reported that they never speed was significantly lower, at 22.8% on national and 29.6% on local roads, which while higher than national statistics indicates there is still room for improvement.

Recommendation: Compliance with speed limits is mostly in line with national data so the recommendation is to monitor this over time and ensure that it is maintained or reduced.

Driving under the influence of drugs and alcohol

Over 90% of respondents reported that they never drove under the influence of alcohol, of those who did admit to driving under the influence of alcohol, it seemed to be occasional rather than habitual. The survey data suggest that there seem to be no obvious trends in self-reported drink driving by geographical area, age or sex.

Almost all respondents reported never driving after consuming illegal drugs. A very small proportion of respondents reported think that some illegal drugs such as steroids or cannabis do not significantly impede driving ability. There does not appear to be a different in opinion of illegal drug use and driving by geographic area, age or sex.

Recommendation: There is a small issue with occasional driving under the influence of alcohol. It may be useful to explore whether there are any trends, for example, whether driving over the drink drive limit is occurring at certain times of the year and, if so, whether targeted education or information campaigns might reduce the frequency.

Seatbelt use

The self-reported data suggest that 99.6% of drivers within the survey always wear their seatbelts/ This is significantly higher than the nationally observed proportion of drivers wearing seatbelts (94.8%). It is likely that respondents self-reporting may overstate their likelihood to wear a seat belt. This could be explored further via observational studies of seatbelt use in the region, but these survey findings suggest that it is not a priority area for VZSW to focus on.

No recommendation against this SPI

Mobile phone use

13% of survey respondents admitted using a handheld mobile phone while driving and those aged between 24 and 44 were most likely to use a handheld mobile phone. This information could be used to inform future education campaigns.

Recommendation: the data showed that 13% of survey respondents aged between 24 and 44 admitted using hand held mobile phones. This suggests that initiatives could be explored with these groups to educate and reduce hand-held phone use.

Motorcyclist use of PPE

Of the 99 motorcyclists who responded to the survey 75% of them said that they wore full PPE suggesting that work could be done to boost this percentage.

Recommendation: Engage with members of the motorcycle community within the region to identify barriers to non-use of full PPE and use this insight to develop education or information campaigns to explain the risks and consequences associated with using in appropriate PPE.

6.1 ADDITIONAL RECOMMENDATIONS

In addition to the SPI-related recommendations set out above, in terms of regional representation, there was a low uptake of responses from Torbay, despite targeted approaches to this area. Should insight from this area be required, something like a postal letter drop survey may be an effective way of reaching the appropriate target audiences.

Similarly, responses from LGV, HGV, professional drivers, e-scooter users, and motorcyclists made up a small proportion of the collected data. If further insight is needed for any of these groups, a targeted outreach campaign through special interest groups, trade unions, or through their employers could offer greater engagement.

Furthermore, the survey data show that there is a willingness for people to use public transport more often if it met user needs. Work could be done to explore needs within certain areas or for certain user groups to identify efficient means of boosting public transport use.



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