nestrans

Regional Transport Strategy Monitoring Report

June 2020

1. Introduction

This Monitoring Report provides information and background data to support the development of the Regional Transport Strategy (RTS), first produced in 2008 and a refresh as approved by Scottish Ministers in 2014. This is the twelfth annual monitoring report and provides information against a total of 48 monitored indicators of which 38 have targets set against them, with a total of 47 targets.

This monitoring report is designed to show progress against the objectives of the RTS which is delivered by Nestrans and its partners. It should be noted that it has taken many years for the strategy to decisively influence most indicators and this process is still ongoing, but it is Nestrans' intention to maintain regular monitoring of its targets and indicators. Nestrans itself may have limited influence over delivery against some of the indicators, however as the delivery of the RTS as a whole relies on the work of many partners, it is important to understand the wider progress and trends across the region.

This process will be refined following the adoption of the new RTS, which will identify a number of appropriate targets that Nestrans will monitor in the coming years. It is the intention of Nestrans that these targets will represents indicators that can be better influenced through the Regional Transport Strategy, although other trends and information will still be monitored to help provide context.

This report seeks to provide information and consider appropriate indicators for taking the RTS forward. In particular, it contains SMART (Specific, Measurable, Achievable, Realistic and Time-Bound) targets to be refined as part of the Delivery Plan. Targets, where possible, relate back to the strategy's identified objectives and therefore the indicators too relate to objectives and the strategy's 21 strands.

The objectives of the Regional Transport Strategy are as follows:

<table>
<tr><td colspan="20">Economy</td></tr>
<tr><td>1</td><td colspan="19">To enhance and exploit the north east's competitive economic advantages, and reduce the impacts of peripherality.
a) To make the movement of goods and people within the north east and to/from the area more efficient and reliable.
b) To improve the range and quality of transport to/from the north east to key business destinations.
c) To improve connectivity within the north east, particularly between residential and employment areas.</td></tr>
<tr><td colspan="20">Monitored by indicators:</td></tr>
<tr><td>1a</td><td>1b</td><td>2a</td><td>2b</td><td>3</td><td>4</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>13 a</td><td>13 b</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>41</td></tr>
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Accessibility, Safety and Social Inclusion	
2	To enhance choice, accessibility and safety of transport for all in the north east, particularly for disadvantaged and vulnerable members of society and those living in areas where transport options are limited. a) To enhance travel opportunities and achieve sustained cost and quality advantages for public transport relative to the car. b) To reduce the number and severity of traffic related casualties and improve personal safety and security for all users of transport. c) To achieve increased use of active travel and improve air quality as part of wider strategies to improve the health of north east residents.

Monitored by indicators:

2a	**2b**	**22**	**26**	**27**	**30a**	**30c**	**31a**	**31b**	**32**	**33**	**34**	**38**	**40a**	**40b**	**41**	**42**	**43**

Environment	
3	To conserve and enhance the north east's natural and built environment and heritage and reduce the effects of transport on climate, noise and air quality. a) To reduce the proportion of journeys made by cars and especially by single occupancy cars. b) To reduce the environmental impacts of transport, in line with national targets. c) To reduce growth in vehicle kilometres travelled.

Monitored by indicators:

3	**5**	**6**	**22**	**30 a**	**30 c**	**31 a**	**31 b**	**35**	**36**	**37**	**39**	**41**	**44**	**45 a**	**45 b**	**46**	**47**

Spatial Planning	
4	To support transport integration and a strong, vibrant and dynamic city centre and town centres across the north east. a) To improve connectivity to and within Aberdeen City and Aberdeenshire towns, especially by public transport, walking and cycling. b) To encourage integration of transport and spatial planning and improve connections between transport modes and services. c) To enhance public transport opportunities and reduce barriers to use across the north east, especially rural areas. d) To ensure that all new developments and transport infrastructure improvements give consideration to and make provisions for pedestrians and cyclists as an integral part of the design process.

Monitored by indicators:

1a	**1b**	**3**	**23**	**24**	**25a**	**25b**	**28a**	**28b**	**29**	**39**	**41**

An indication of which indicators are moving in the right direction is provided by using a colour coding scheme, whereby indicators on-target are indicated in green highlight and underlined, those which have *some degree of success (perhaps some parts are being achieved or some improvement, but not as great as targeted) are highlighted in yellow and are in italics*, those which indicate **a move in the wrong direction are highlighted in red and in bold** and those with no data or no significant change are highlighted in grey; those with no target are not highlighted.

In the 2020 monitoring report, there are 48 indicators identified (some have more than one measurable, giving a total of 57 indicators in total), of which 38 have at least one target set against them, a total of 47 targets. Using the most up-to-date data available, the following results can be summarised:

	2019	**2020**
Indicators on target	19	18
Indicators with *some success*	*15*	*16*
Indicators moving in the **wrong direction**	**11**	**13**
Indicators with no data available or target set	10	10

It should be noted that although this report is published on an annual basis, it uses the most recent data available from the variety of different sources used to compile this report, of which the two key publications are the 'Scottish Transport Statistics' (published annually in December) and the 'Scottish Household Survey' (published every second year in August). As these publications are produced at different times, the most recent annual results for all indicators do not always show the same year. Caution should therefore be taken when comparing different indicators with each other as sources and years may vary.

This report provides data regarding measurable indicators under each of the strategy's four strategic objectives and twelve operational objectives. The objectives have been developed from the original National Transport Strategy's five high level objectives of Economic growth, Accessibility, Safety, Environmental Sustainability and Integration and relate to its strategic outcomes. It also reflects the Government's Purpose and outcomes and correlates to the local authorities' and Community Planning Partnerships' outcomes. The report also identifies where there are gaps in the information available and considers where there may be a need to ensure that measurements are undertaken to inform transport operators and authorities of the success of interventions in the system.

There are a number of indicators for which it is not appropriate to establish targets, but the indicators will be monitored to provide an understanding of the changing nature of transport in the area.

Nestrans will work closely with local authorities in seeking to ensure that the indicators, targets and monitoring regimes to support Local Transport Strategies are consistent with the RTS and that there is no duplication of effort in producing data.

2. Index of Indicators

	Indicator	2020
Rail		
1	Number of rail stations in the North East and population with access to a station	*Some success*
		Some success
2	Number of rail services per week (with typical journey times) from Aberdeen to key destinations.	*Some success*
		Wrong direction
3	Number of passengers per year through north east stations	**Wrong direction**
4	Number of passengers per year through north east stations and proportion of all Scotland's rail patronage	**Wrong direction**
Road		
5	Distance travelled by vehicles in the north east	**Wrong direction**
6	Growth in vehicle kilometres travelled in the north east in the preceding decade	*Some success*
7	Traffic in north east as a percentage of Scotland's traffic	No target set
8	Composition of motorised traffic on north east roads	No target set
Air		
9	Number of passengers through Aberdeen Airport	*Some success*
10	Proportion of Scotland's air passengers using Aberdeen Airport	**Wrong direction**
11	The number of destinations served direct from Aberdeen Airport	**Wrong direction**
12	Proportion of passengers through Aberdeen Airport using bus / rail	On target
Maritime		
13	Number of ferry services from north east ports (with typical journey times)	On target
		On target
14	Number of passengers carried on ferry services to the Northern Isles	*Some success*
Freight		
15	The volume of goods through the north east's major ports	*Some success*
16	Number of countries with shipping services from north east ports	*Some success*
17	The volume of goods to or from the region carried by air freight	No target set
18	The volume of goods to or from the north east carried by Heavy Goods Vehicle	No target set
19	Number of permanent restrictions affecting trunk routes in or to/from the north east	On target
20	The volume of goods to or from the region carried by rail freight	No target set
Coach		
21	Number of coach services per week from the north east direct to key locations	On target
Bus		
22	The number of people using buses in the north east	**Wrong direction**

23	The percentage of north east residents who find public transport convenient	On target
24	The percentage of north east residents who were satisfied with public transport	On target
25	Punctuality and reliability of buses	*Some success*
		Some success
26	The price of car parking in Aberdeen city centre relative to bus fares	*Some success*
27	The cost of a monthly bus ticket in Aberdeen compared with other Scottish cities	No target set
28	The number of people using park and ride sites in the north east	On target
		Wrong direction
29	The ability to transfer from one transport company to another with minimum hassle and using a single ticket	On target
Cycling and Walking		
30	Total number of cyclists recorded on key routes	*Some success*
		Wrong direction
31	Total number of pedestrians recorded on key routes	On target
		Wrong direction
Mode Split and Personal Travel		
32	The proportion of households in the north east without access to a car or van	No target set
33	The number of blue badge holders in the north east	No target set
34	The proportion of taxis which are capable of carrying wheelchairs	On target
35	The proportion of travel to work journeys by modes other than car driver	**Wrong direction**
36	The proportion of children travelling actively to school	**Wrong direction**
37	Number of participants in the Getabout car share scheme	*Some success*
38	Number of car club members	On target
Journey Times and Congestion		
39	The percentage of driver journeys delayed due to congestion	*Some success*
40	Average journey speeds by car and public transport	*Some success*
		Wrong direction
41	Typical journey times by road to and from Aberdeen city centre	No target set
Road safety		
42	The number of casualties in road traffic collisions	On target
43	The number of deaths in road traffic collisions	On target
Environment		
44	Carbon Dioxide emissions road transport	*Some success*
45	The number of public EV points available in the north east	On target
		On target
46	The average atmospheric concentrations of nitrogen dioxide	On target
47	The average atmospheric concentrations of particulates	On target
48	The number of Noise Management Areas	Trend yet to be established

3. Population

The population of the Nestrans area at the time of the 2011 Census was **475,766** – an increase of 36,770 since 2001 (a rise of 8.4% in ten years). Table 1 shows the estimated population, number of households and area of the region at 2018. The estimated populations for Aberdeen City and Aberdeenshire decreased slightly between 2017 and 2018. In Aberdeen City, the population decreased from 228,800 to 227,560 – a decrease of 0.5%. In Aberdeenshire, the population decreased from 261,800 to 261,470. Despite this, the population of the region remain around 9% of Scotland's total.

Table 1: Population, Households and Area, June 2018

	Population	Number of households	Area (sq km)	Area (sq miles)
Aberdeen City	227,560	107,586	186	72
Aberdeenshire	261,470	111,156	6,313	2,437
North East	489,030	218,742	6,499	2,509
SCOTLAND	5,438,100	2,477,275	77,911	30,082
NE as % of Scotland	9.0%	8.8%	8.3%	8.3%

Source: Scotland's Census, National Records of Scotland, Council Population Estimates and Estimates of Households and Dwellings

4. Rail

There are currently eight railway stations in the north east. This increased from seven with the opening of Laurencekirk station in May 2009. Progress is being made towards the opening of a new station at Kintore and this project is now being developed in partnership by Nestrans, Aberdeenshire Council, Transport Scotland and Network Rail and is scheduled to open later in 2020.

Indicator 1 provides an estimate of the population within walking distance (1.6 kilometres) of a railway station and within 5 kilometres. With developments focussed on having good accessibility and opening of additional stations, it is the intention that these proportions will increase over time.

Indicator 1: Number of rail stations in the North East and population with access to a station			
	Number of stations	**Population within 1.6km of a station** **(and proportion of total North East population)**	**Population within 5km of a station** **(and proportion of total North East population)**
2001 baseline	7	81,550 (19%)	230,986 (53%)
2012	8	95,259 (20%)	254,431 (53%)
2017	8	108,222 (23%)	246,183 (52%)
2019	8	109,679 (22%)	247,745 (51%)
2020	8	108,740 (22.2%)	246,222 (50.3%)
Target 1a: *To open a new railway station in the north east every three years, to a total of 12 by 2021.*			
Target 1b: *To increase the proportion of the north east population with access to a station to at least 25% within 1.6 km and at least 60% within 5 km by 2021.*			

Source: Strategic Development Planning Authority Main Issues Report Monitoring Statement (2011), Councils' Small Area Population Statistics (2019).

Indicator 2: Number of rail services per week (with typical journey times) from Aberdeen to key destinations

		London	Sleeper	Edinburgh	Glasgow	Dundee	Inverness	Inverurie	Total journeys
No. of Services (average journey times)	**2007 Baseline**	19 (7hrs 02)	7 (10hrs 24)	124 (2hrs 25)	102 (2hrs 33)	232 (1hr 11)	59 (2hrs 15)	95 (0hrs 25)	638
	2012 (5 yrs)	21 (7hrs 11)	6 (10hrs 05)	117 (2hrs 29)	96 (2hrs 40)	231 (1hr 12)	71 (2hrs 16)	131 (0hrs 23)	673
	2017 (10 yrs)	21 (7hrs 16)	6 (10hrs 41)	118 (2hrs 31)	108 (2hrs 39)	229 (1hr 13)	71 (2hrs 16)	144 (0hrs 22)	697
	2018	21 (7hrs 04)	6 (10hrs 04)	118 (2hrs 33)	106 (2hrs 43)	231 (1hr 13)	71 (2hrs 15)	142 (0hrs 23)	695
	2019	21 (7hrs 05)	6 (10hrs 44)	118 (2hrs 30)	106 (2hrs 37)	231 (1hr 11)	71 (2hrs 16)	142 (0hrs 22)	695 (+8.9% on baseline)
	2012 - 2019 times are average journey times across all services Monday to Sunday – this is different to previous years which simply recorded a typical journey time.								

Target 2a: *To increase the number of rail services to key destinations by 10% every five years (i.e. services from Aberdeen to six key destinations increasing from 638 services in 2007 to 834 services per week by 2021).*

Target 2b: To have shorter rail journey times to key destinations, reduced by at least 10% of 2007 baseline by 2021 (i.e. Aberdeen-London <6hrs 30; Aberdeen-Edinburgh <2hrs 10; Aberdeen-Glasgow <2hrs 20; Aberdeen-Inverness <2hrs).

Source: Rail timetables

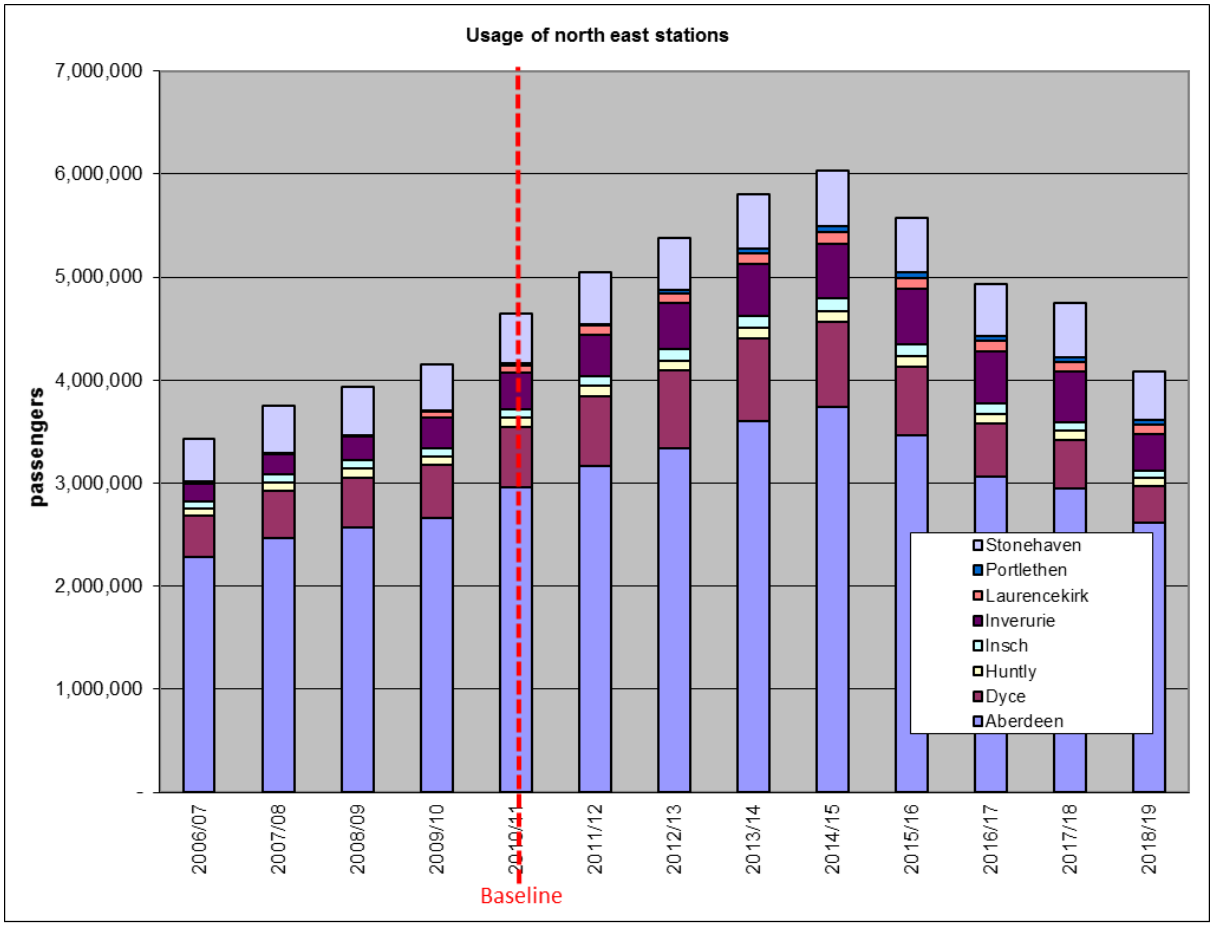
Note that the average journey time for the sleeper service has been affected by an increase in the journey times on a Sunday. It should be noted that there are timetable variations that bring the typical journey time to 10hrs 06.

Indicator 3: Number of passengers per year through North East stations (and ranking within Scotland for those in top 100)

	Aberdeen	Dyce	S'haven	Inverurie	Insch	L'kirk	Huntly	P'lethen	TOTAL
2010/11 Baseline	2,964,302 (5th)	579,660 (59th)	482,722 (74th)	345,790 (99th)	86,854	73,594	90,010	18,382	**4,641,314**
2015/16 (5 years)	3,459,944 (5th)	664,396 (58th)	535,698 (79th)	533,972 (80th)	118,378	104,488	105,846	56,324	**5,579,046**
2016/17	3,058,268 (5th)	517,586 (78th)	504,750 (81st)	511,708 (79th)	98,140	96,002	94,904	45,936	**4,927,294**
2017/18	2,948,186 (7th)	466,700 (85th)	522,890 (78th)	488,950 (82nd)	88,362	95,848	92,958	42,748	**4,746,642**
2018/19	2,616,142 (7th)	358,670	469,616 (84th)	355,824	69,952	86,332	77,782	46,722	**4,081,040**
% change from baseline (2010/11 to 2018/19)	**-12%**	**-38%**	**-3%**	**+3%**	**-19%**	**+17%**	**-14%**	**+154%**	**-12%**

Target 3: To increase passenger numbers through the north east's railway stations by 50% by 2021 on 2010/11 figures.

Source: Office of the Rail Regulator and Scottish Transport Statistics



Usage of north east stations has been reducing since 2014/15, likely due in part to the downturn in the oil industry and significant disruptions to enable the works to dual the track between Aberdeen and Inverurie. Travel within the north east has also reduced, although there were an estimated 2.72 million rail journeys made to, from or within the north east in 2017/18.

963,000 trips were made into and 963,000 were made out of the region, and there were 793,000 internal trips (Note that in Indicator 3, internal trips will be counted both as a start and end for passengers through stations). In total, these trips cover an estimated 216 million miles.[1] (348 million kilometres).

[1] Reference: Estimated using data from the Scottish Transport Statistics

Rail journeys (thousands) 2017/18

	To north east	Within north east	From north east	Estimated average distance (km)		Total km (thousands)
Angus	121		121	Angus	84 (Arbroath)	20,252
Dundee	95		95	Dundee	108 (Dundee)	20,487
Fife	45		45	Fife	158 (Kirkcaldy)	14,194
Edinburgh and Lothians	267		267	Edinburgh and Lothians	204 (Edinburgh)	109,142
Moray	97		97	Moray	105 (Elgin)	20,294
Highland	98		98	Highland	167 (Inverness)	32,805
Glasgow	166		166	Glasgow	237 (Glasgow)	78,542
Perth, Stirling, Falkirk	58		58	Perth, Stirling, Falkirk	195 (Stirling)	22,589
Rest of Scotland	16		16	Rest of Scotland	296 (Ayr)	9,476
	963		963			
Within Aberdeen		269			13 (Dyce)	3,463
Within Aberdeenshire		31			40	1,247
City to Shire		493			31 (Stonehaven)	15,075
Total journeys		**2,719**				**347,567** km

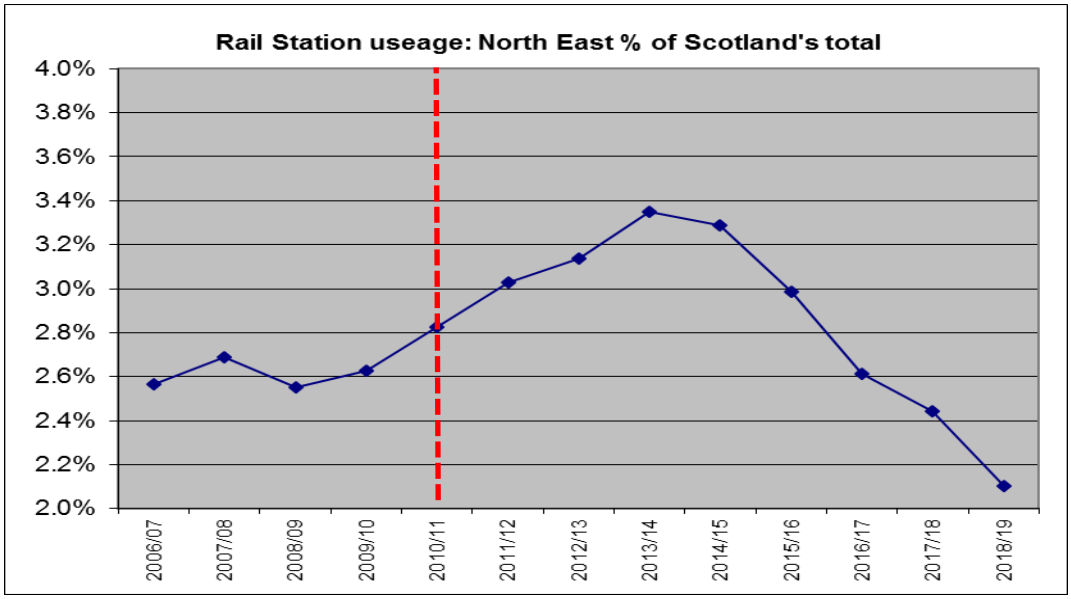
Source: Extrapolated from Scottish Transport Statistics 2019

Indicator 4: Total number of passengers per year through North East stations and proportion of all Scotland's rail patronage*

	North East all stations	Total number of passengers through Scottish stations	NE as % of Scotland
2010/11 (Baseline)	4,641,000	164,341,000	2.8%
2013/14	5,803,000	173,356,000	3.4%
2016/17	4,927,000	188,466,000	2.6%
2017/18	4,747,000	194,284,000	2.4%
2018/19	4,081,040	193,977,480	2.1%
% change from 2010/11 to 2018/19	**-12%**	**+18%**	

Target 4: To increase passenger numbers through the north east's railway stations as a proportion of Scotland's rail patronage to at least 4% by 2021.

*Note that a journey within Scotland will involve at least two stations (i.e. an entry and an exit, plus any changes or transfers) so total number of passenger journeys is less than half the total number of passengers through stations.



5. Road

Road Lengths (Kilometres) 2018/19

		Transport Scotland		Local Authority Roads		TOTAL
		Motorway	Trunk	A Class	Minor	
Road lengths	Aberdeen	0	36	103	862	1,000
	Aberdeenshire	0	235	688	4,875	5,798
	North East	0	271	791	5,737	6,799

Source: Scottish Transport Statistics 2019

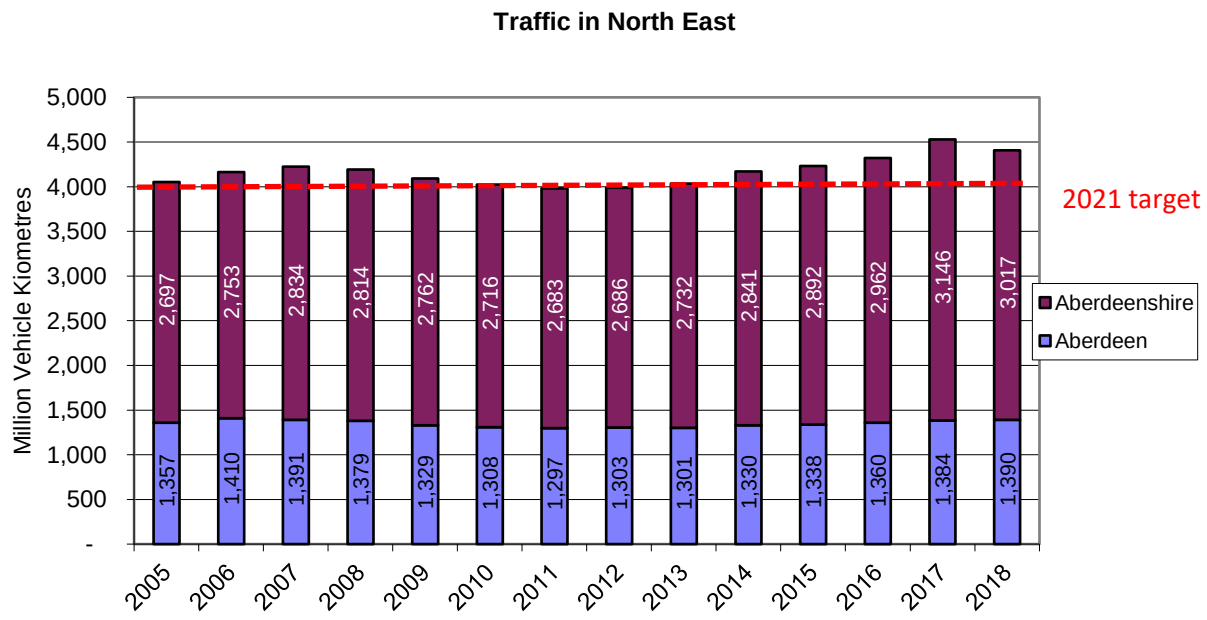
In 2018, roads in the north east made up 12% of the total road infrastructure in Scotland.

Traffic in the north east

In 2018, traffic within the north east travelled a total of **4.407 billion kilometres (2.7 billion miles)**, some 9.2% of all traffic in Scotland. In Aberdeen there was almost 1.4 billion kilometres (0.9 billion miles) travelled, and in Aberdeenshire over 3 billion kilometres (1.9 billion miles).

Traffic levels were on or below the target of 4 billion vehicle kilometres per year between 2010 and 2012, however since 2013 there has been an increase above this target line with 2018 showing an overall increase of 8.7% on the 2005 baseline year, although this is less than Scotland as a whole. The increase in the north east is predominantly a result of increased traffic in Aberdeenshire – traffic in Aberdeen has only changed slightly since 2006 levels. In 2018, traffic levels dropped for the first time since 2010, with a reduction of 2.7% between 2017 and 2018.

Indicator 5: Distance travelled by vehicles in the north east



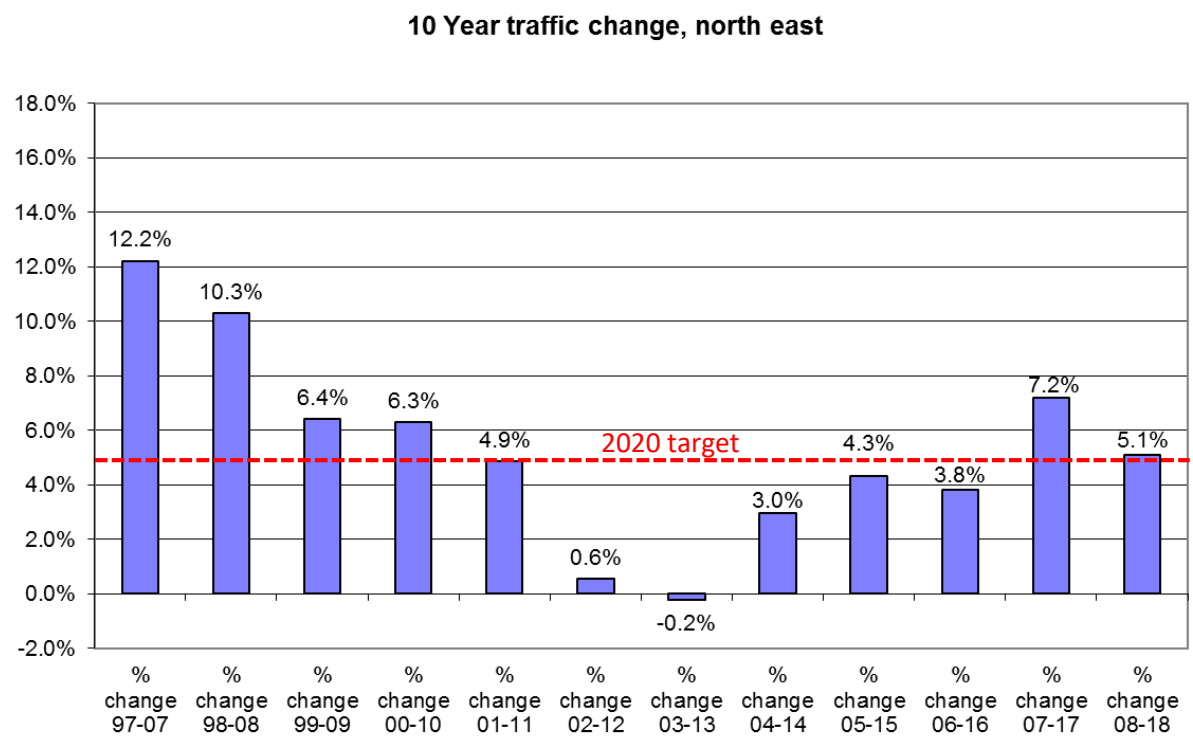
% change 2005 baseline to 2018	Aberdeen City: +2.4%	Aberdeenshire: +11.9%	North East: +8.7%

Target 5: To maintain traffic at or below 4 billion vehicle kilometres per year through to 2021.

Source: Scottish Transport Statistics, 2019

The growth in vehicle kilometres travelled is best represented by considering ten-year growth patterns. In the decade to 2007, growth in the north east was 12%, an average of 1.2% per annum. In the decade to 2011 however, this level of growth reduced substantially and the decade between 2003 and 2013 saw traffic reduce slightly, by 0.2%. Traffic increased again between 2014 and 2017, with growth in traffic between 2007 and 2017 rising above target for the first time since 2010. This has seen a reduction in 2018, with growth in traffic of 5.1% between 2008 and 2018.

Indicator 6: Growth in vehicle kilometres travelled in the north east in the preceding decade.

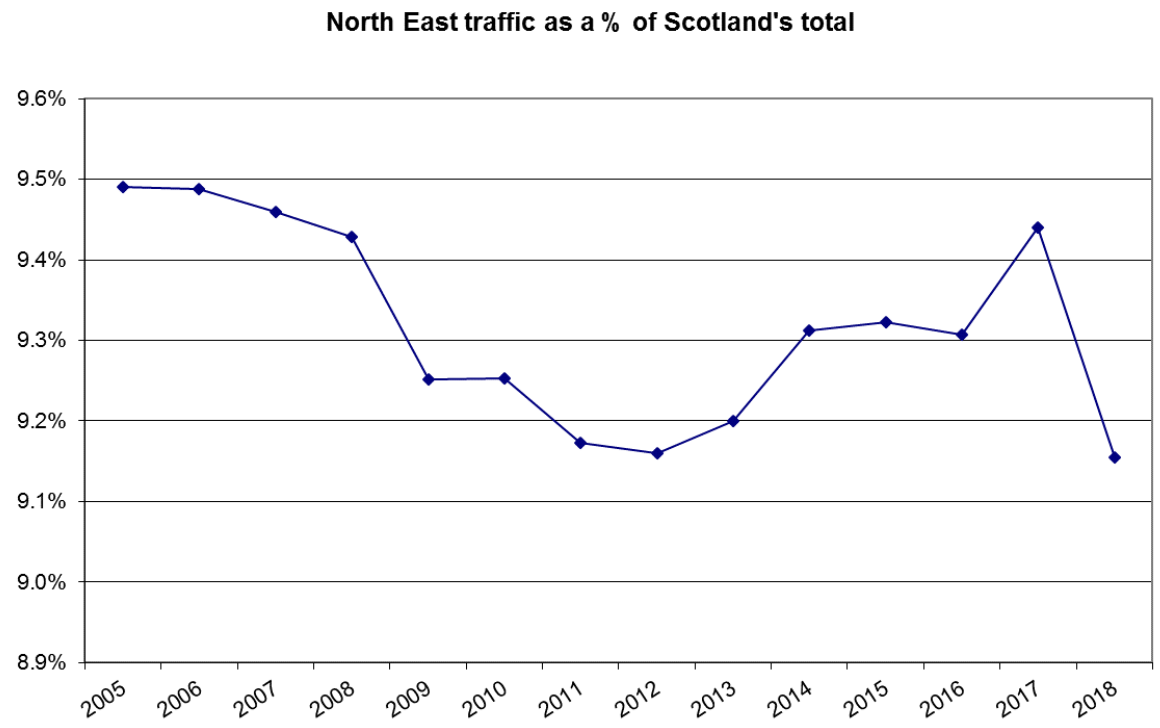


Target 6: *To reduce the rate of growth of traffic to less than 5% for the decade to 2021.*

Source: Scottish Transport Statistics, 2019

Similarly, whilst traffic in the north east as a percentage of Scotland's traffic has seen some slight increases since 2012, overall traffic growth between 2005 and 2018 has been less in the north east than in Scotland as a whole. Between 2014 and 2016, this remained fairly constant at around 9.3% of Scotland's traffic. Whilst there was an increase to over 9.4% in 2017, this has been followed by a significant decrease in 2018, bringing traffic growth as a percentage of Scotland's traffic to its lowest level at under 9.2%.

Indicator 7: Traffic in north east as a percentage of Scotland's traffic

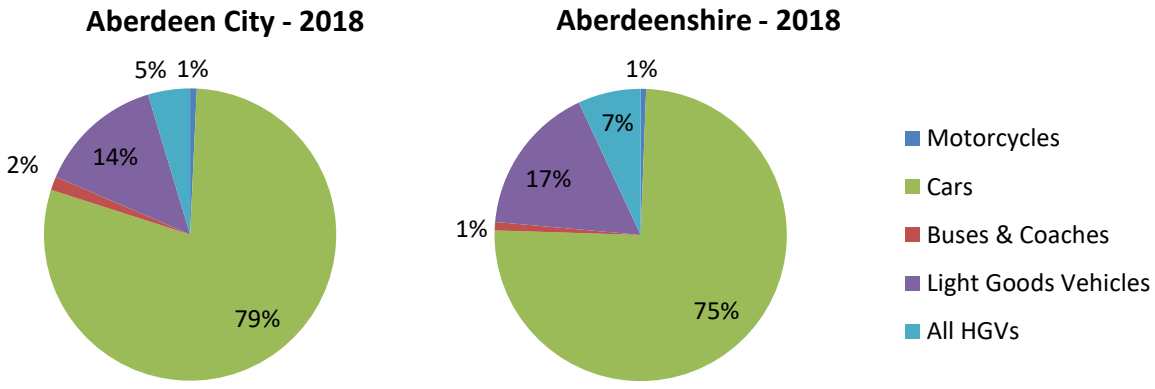


Change in traffic volumes - 2005 baseline to 2018	Traffic in the North East:	Total Scottish Traffic:	North East as a % of Scotland:
2005	4.054 bn km	42.718 bn km	9.5%
2018	4.407 bn km	48.137 bn km	9.2%

Source: Scottish Transport Statistics, 2019

Traffic composition in 2018 was similar in both Aberdeenshire and Aberdeen City, with between 75% and 79% of road traffic made up of cars and with LGVs and HGVs making up another 19 - 24% of traffic. Whilst the composition of buses remains low, there have been increases in the volume of bus traffic over the last 10 years.

Indicator 8: Composition of motorised traffic on north east roads



Source: Department for Transport Road Traffic Counts

6. Air

Passenger numbers through Aberdeen Airport declined from 2014's peak of 3,723,000 to below 3 million before recovering slightly to over 3 million passengers in 2018. However, despite not being borne out in the below figures, the global Covid-19 pandemic has had a significant impact on the number of flights in early 2020 with airlines cancelling flights and Flybe entering administration. While other airlines appear to be at risk of going into administration, the exact magnitude of the pandemic's consequences for airlines remains to be seen.

Additionally, oil prices have dropped significantly in 2020. The drop in oil prices in 2014 was a significant contributing factor to the drop in air traffic in the following years due to the significance of the Oil and Gas Sector to the North East. Both the global pandemic and the drop in oil prices are likely to be reflected in Aberdeen's airport traffic in the early 2020s when compared to previous years.

While the decline in air traffic will lead to a reduction in greenhouse gas emissions, it will also be damaging to the economy particularly given the higher proportion of business travellers, of 56% at Aberdeen airport, compared to Edinburgh and Glasgow at around 30% each.

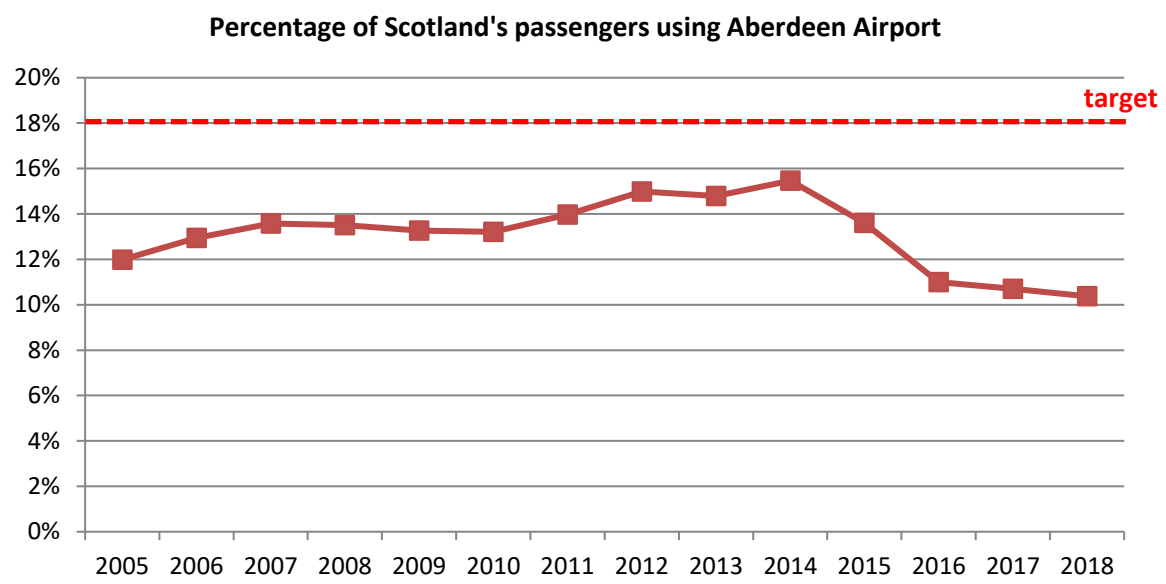
Indicator 9: Number of passengers through Aberdeen Airport

% change on 2005 baseline	+7.2%

Target 9: *To increase the number of passengers through Aberdeen Airport by an average of 3% per year between 2010 and 2021, to more than 4 million by 2021.*

Source: Scottish Transport Statistics, Aberdeen Airport Masterplan, CAA

Indicator 10: Proportion of Scotland's air passengers using Aberdeen Airport



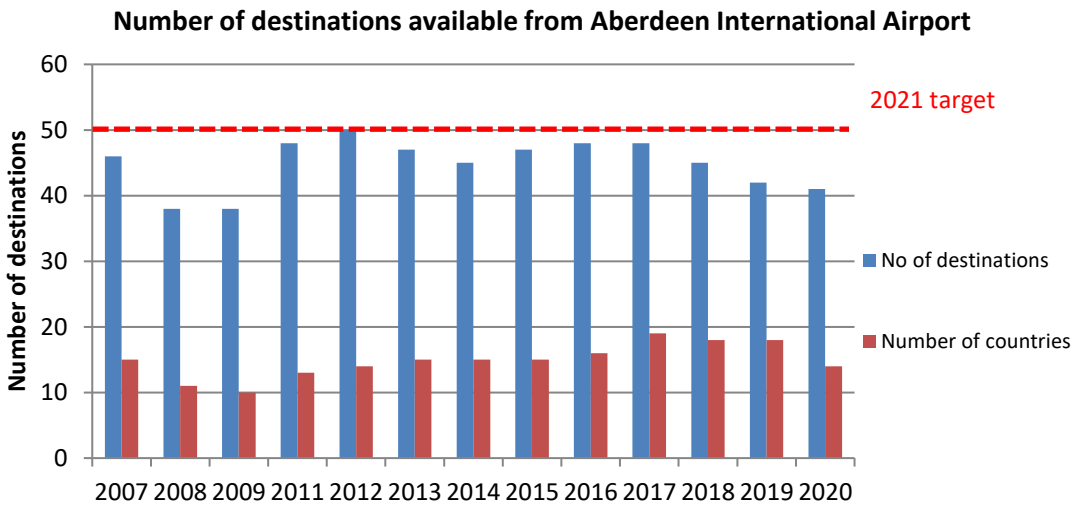
% change on 2005 baseline	-2% points

Target 10: To increase the proportion of Scotland's air passengers who pass through Aberdeen International Airport to at least 18% by 2021.

Source: Scottish Transport Statistics, CAA - Please note that the 2016 and 2017 figures for Scotland have been amended to include passenger numbers for Glasgow Prestwick, as these had previously been omitted.

A decline in the proportion of passengers using Aberdeen Airport compared to Scotland's other airports has also coincided with 2014 fall in oil prices: it declined from a high of over 15% in 2014 to slightly over 10% in 2018.

Indicator 11: The number of destinations served direct from Aberdeen Airport



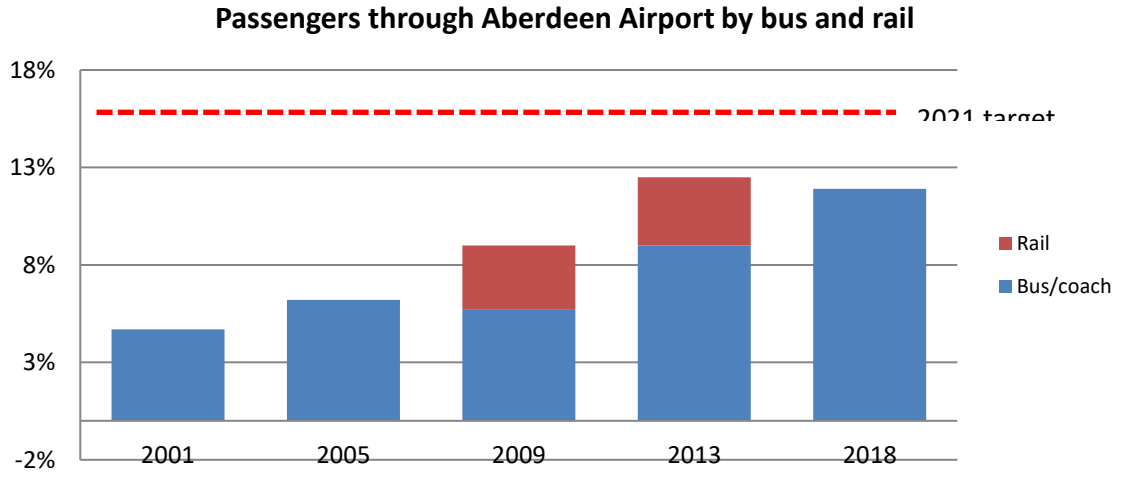
% change on 2007 baseline	Destinations: -11%	Countries: -7%

Target 11: To increase the number of destinations served direct from Aberdeen International Airport to at least 50 by 2021.

Source: Aberdeen International Airport website, March 2020

Aberdeen International Airport in spring 2020 had direct connections to 41 airports in 15 countries. Both the number of countries and the number of destinations have decreased relative to the baseline. The aforementioned global pandemic and the decrease in oil prices are not reflected in the above data.

Indicator 12: Proportion of passengers through Aberdeen Airport using bus/rail.



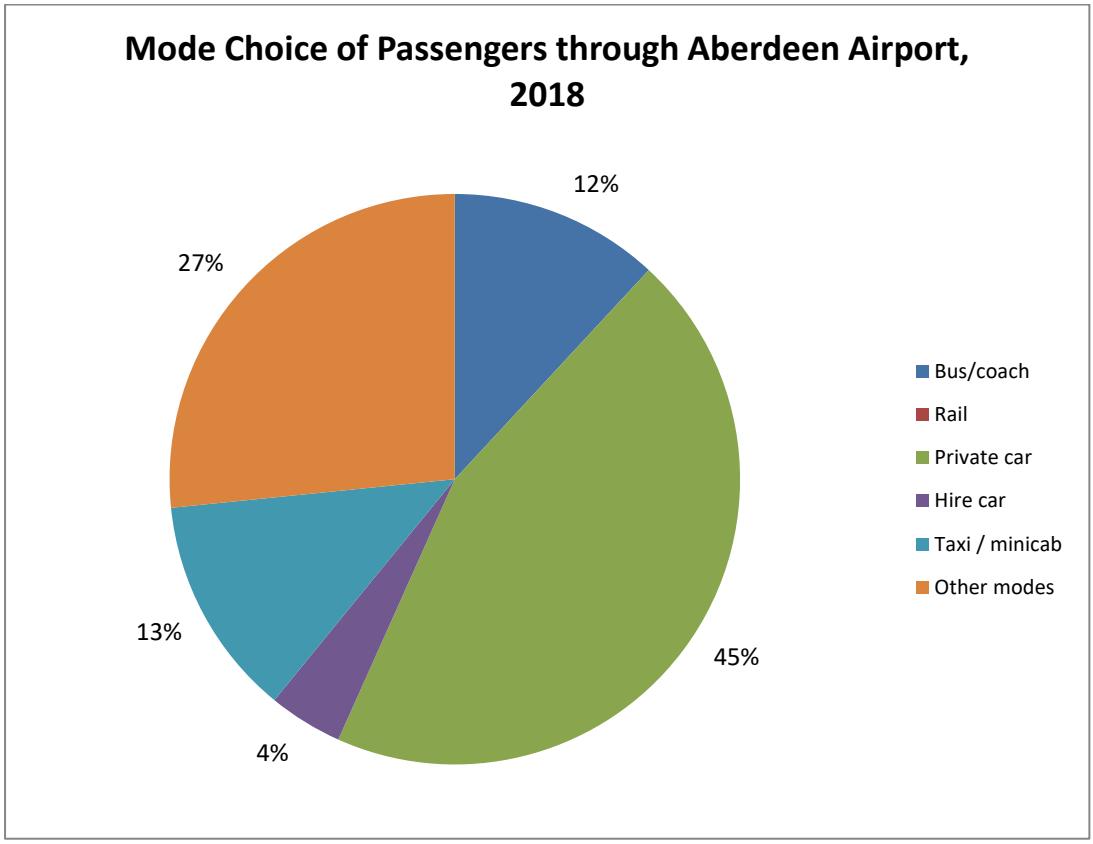
Target 12: To increase the proportion of passengers accessing Aberdeen International Airport by public transport to at least 15% of passengers by 2021.

Source: AIAL surveys and Scottish Transport Statistics, 2019[2]

[2] Data is collected by the CAA on a rolling basis.

The Civil Aviation Authority undertakes passenger surveys at airports but as the most recent update of this data was in 2013, surveys undertaken by Aberdeen Airport have been used. It should be noted that these surveys use slightly different parameters. Surveys indicate that there has been a shift towards public transport access at the airport from less than 5% in 2001 to almost 12%. The loss of the shuttle bus between Dyce station and the airport is reflected in lower rail numbers in recent surveys, although this link was reintroduced in 2020.

In recent years, access to the airport by public transport has been significantly improved through the introduction of the Jet 727 service, providing a frequent link from Aberdeen. In 2019 the introduction of the 747 and 757 services allow a direct connection to Aberdeen Airport from Ellon, Newtonhill, Portlethen, Stonehaven and Montrose by utilising the newly opened AWPR.



Source: Aberdeen International Airport Survey, 2018

While private car still constitutes the largest mode of transport for those visiting the airport, bus and coach has increased compared to previous years while the 'other' category, includes people being dropped off at the airport which could also suggest a proportion of car share is being utilised.

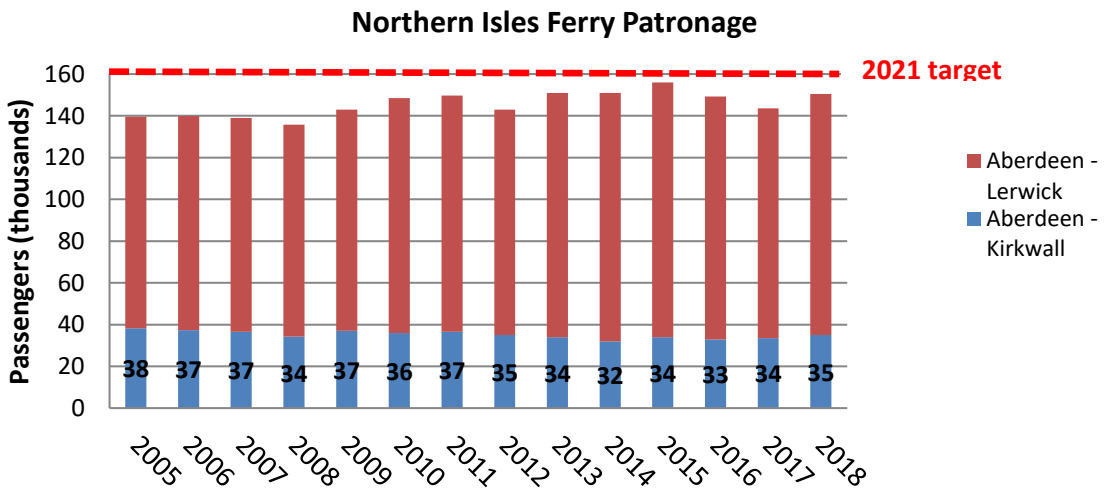
7. Maritime

Indicator 13: Number of ferry services from north east ports (with typical journey times)				
	To Orkney		To Shetland	
	Journeys / week	Journey time	Journeys / week	Journey time
2007 Baseline	4	6 hrs	7	12 ½ hours
2019	4 summer / 3 winter	6 hrs	7	12 ½ - 14 ½ hours depending on whether it calls at Kirkwall
Target 13a: To maintain at least the current number of ferry services and journey times from north east ports through to 2021.				
Target 13b: To maintain at least the current journey times for ferry services from north east ports through to 2021				

Source: Northlink Ferries timetables, 2019

The Scottish Ferries Plan was published in early 2013 and this has confirmed the continuation of the service from Aberdeen to Orkney and Shetland. Serco Northlink Ferries currently operate daily services, but it has been announced that the next franchise may be open to a public sector bidder. The proposed introduction of Road Equivalent Tariffs (RET) is expected to increase demand and the development of the new south harbour at Bay of Nigg may introduce a further potential for significant growth in coming years.

Indicator 14: Number of passengers carried on ferry services to the Northern Isles.



% change on 2007 baseline	Aberdeen-Kirkwall	Aberdeen-Lerwick	Total
	-8%	+14%	+8%

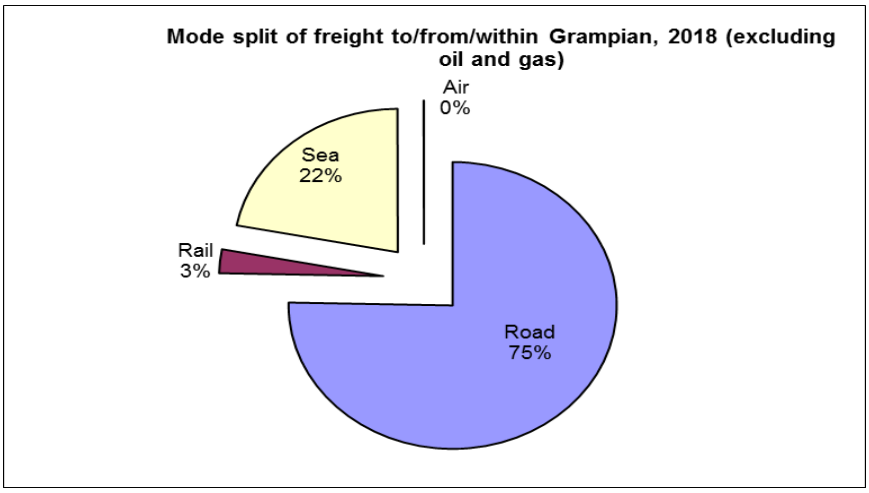
Target 14: *To increase the number of passengers on Northern Isles ferry services from north east ports by an average of 1% per year between 2007 and 2021, to at least 160,000 passengers by 2021.*

Source: Scottish Transport Statistics, 2019

Passenger numbers have decreased from a peak of 156,000 in 2015 to 144,000 in 2017 before rising back to 150,000 passengers in 2018.

8. Freight

Modal split of freight movements is a key indicator of the efficiencies of the movement of goods and the availability of alternative choices.

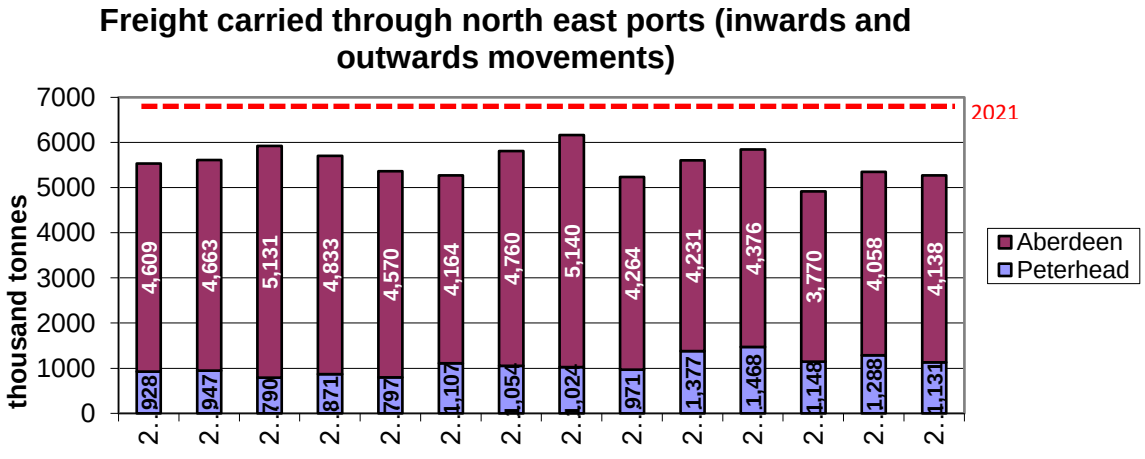


Since 2013, the recording of freight data has changed significantly for railfreight and HGV freight, meaning that continuing comparison between the modes is no longer possible. Freight volumes in the north east region reflect economic factors and have therefore seen reduced tonnages in recent years, with around 24 million Tonnes of Goods (excluding oil and gas pipelines) moved in 2018. Information for each of the freight modes are summarised in the following sections.

Maritime freight

The total volume of freight through the north east's two major ports in 2018 was 5.269 million tonnes, a small decline on 2017.

Indicator 15: The volume of goods through the north east's major ports (Tonnes)



% change on 2005 baseline	Aberdeen: -10%	Peterhead: +22%	Total: -5%

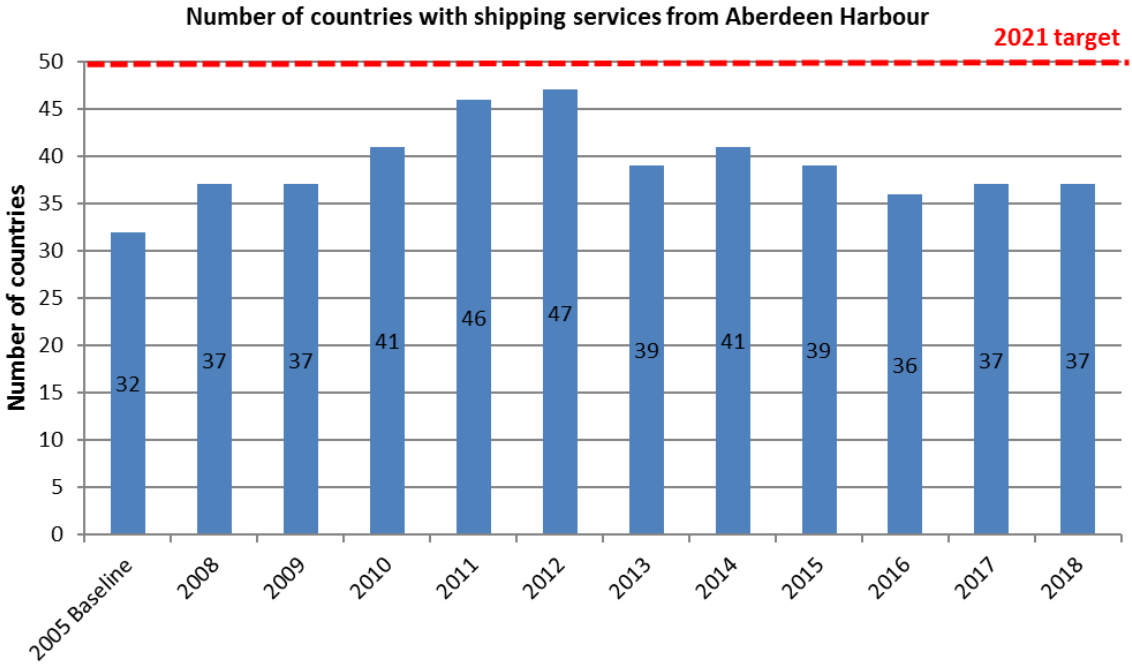
Target 15: *To increase the volume of goods through Aberdeen and Peterhead Harbours by an average of at least 1% per year between 2005 and 2021, to 6.9 million Tonnes by 2021.*

Source: Scottish Transport Statistics 2019

The movement of goods through Aberdeen and Peterhead harbours have seen varying fortunes since 2005. In 2015, Peterhead saw its highest level since 1999, at nearly 1.5 million tonnes. This dropped in 2016 and despite an increase in 2017, has declined in 2018 to 1.13 million tonnes. Aberdeen Harbour on the other hand saw growth of 12% between 2005 and 2012, to a figure of over 5 million tonnes. There has since been an overall decrease in the movement of goods, with each of 2017 and 2018 handling just over 4 million tonnes through Aberdeen Harbour.

Together, the two ports of Aberdeen and Peterhead carry around 8% of Scotland's maritime freight. This proportion has risen from a base of 5.0% in 2005.

Indicator 16: Number of countries with shipping services from north east ports



Target 16: *To increase the number of countries with links from north east ports to at least 50 by 2021.*

Source: Aberdeen Harbour Annual Review, 2019/20

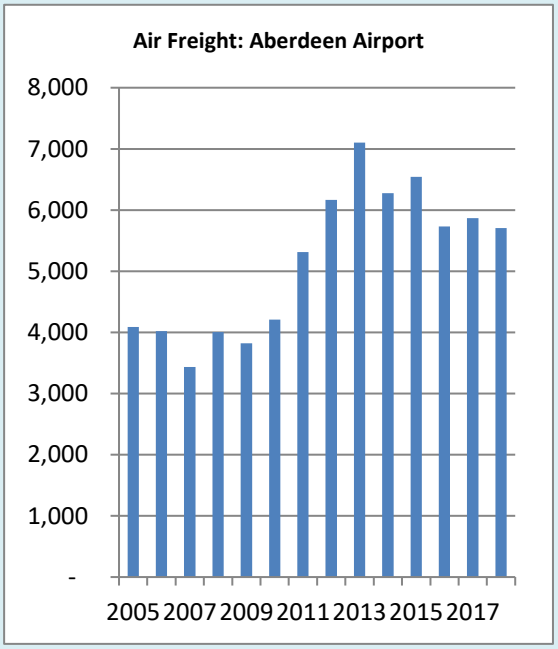
Services from Aberdeen are available on a regular basis to 37 countries worldwide. This has fallen from a peak in 2012, but remains above the 2005 baseline of 32.

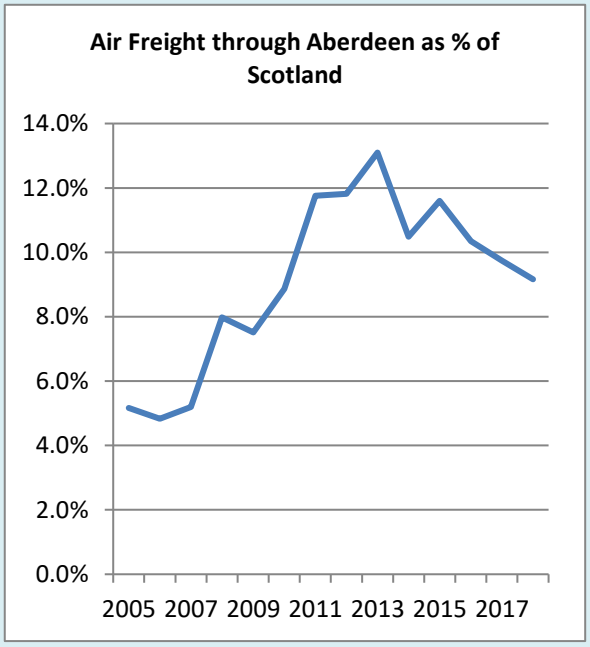
Air freight

Freight through Aberdeen International Airport tends to be fairly small volumes, but can often be high value or urgently required goods. In 2018, 5,706 Tonnes were transported through Aberdeen Airport, an increase of 40% since 2005, although a decrease from a high of 7,102 in 2013 and a slight decrease on the previous year. This represents some 9.2% of Scotland's airfreight movements.

Whilst Aberdeen has seen a decrease in freight movements in recent years, the level of freight carried bucks the trend seen in Scotland more generally, where air freight has been in an overall decline since 2006. Figures for Scotland in 2018 marked a 21% decline from the 2005 baseline.

Indicator 17: The volume of goods to or from the region carried by air freight





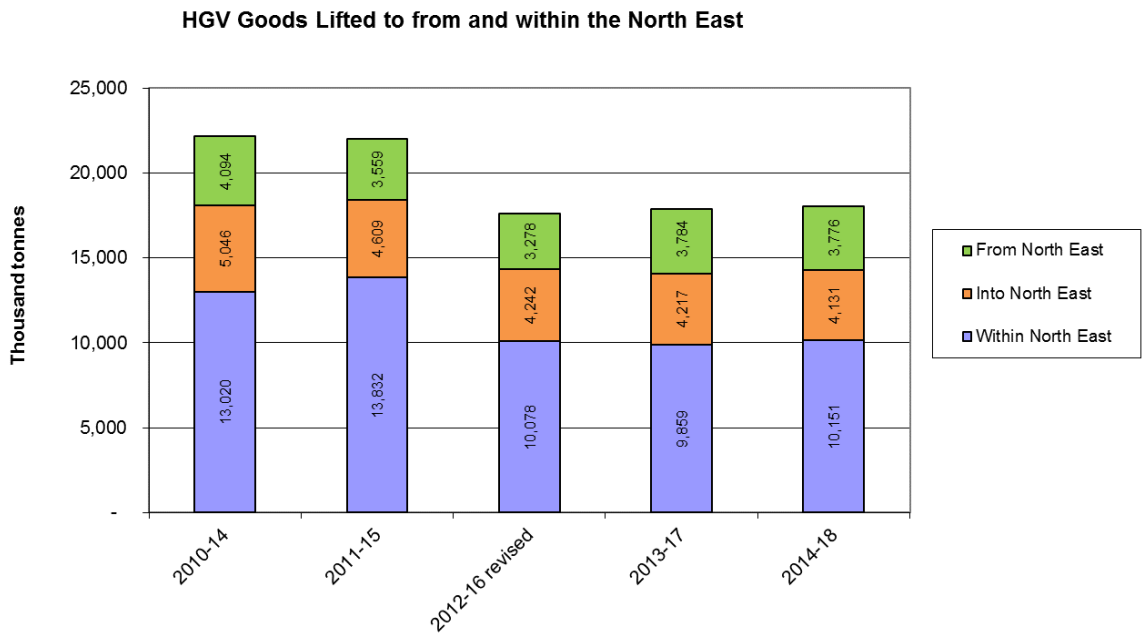
2005 Baseline	4,089 Tonnes
2010	4,211 Tonnes
2015	6,545 Tonnes
2017	5,870 Tonnes
2018	5,706 Tonnes
% change on 2005 baseline	+40%

Source: Scottish Transport Statistics, 2019

Heavy Goods Vehicles

An average of just over 18 million tonnes of goods were moved by lorry to, from and within the Nestrans region every year between 2014 and 2018. Approximately 10 million Tonnes per year are moved within the region by lorry, with a further 4 million Tonnes imported and 4 million Tonnes exported.

Indicator 18: The volume of goods to or from the north east carried by Heavy Goods Vehicle



Source: Extrapolated from Scottish Transport Statistics 2019

Indicator 19: Number of permanent restrictions affecting trunk routes in or to/from the north east	
2007 Baseline	Number of trunk road restrictions: 2 Height restriction (15' 3") and signal-controlled carriageway on A96 at Inveramsay Bridge Width restriction (7' 0") A90 at Bridge of Dee
2019 Update	Number of trunk road restrictions: 0 Construction of the Inveramsay Bridge upgrade on the A96 trunk road was completed in March 2016 and allows two-way traffic flows. Construction of the AWPR was completed in February 2019 and allows an option for an unrestricted route for HGVs on trunk roads.
Target 19: To remove all diversions relating to restrictions on trunk routes by 2018	

Rail freight

In 2007, Network Rail implemented a gauge enhancement between Mossend in Lanarkshire and Aberdeen/Elgin to remove one of the constraints restricting rail freight development to and from the north east. Terminal developments constructed at Raiths Farm, Craiginches and Waterloo Quay have combined to offer an enhanced rail freight product in the north east.

Since 2013 data from rail freight has not been easily accessible in a comparable form. However correspondence in 2017 supplied the following information showing that whilst general rail freight is dropping in volume, the demands for materials required by large construction contracts such as the AWPR and the new harbour has increased the volume of materials carried to the north east by rail. There are currently three active carriers of rail freight that serve Aberdeen. Freightliner Heavy Haul operated in Aberdeen until January 2016 when its contract was taken over by Colas Rail.

Using information provided in 2017, an estimated tonnage per month to/from the north east has been calculated. This is a rough figure and is currently in the process of being better defined for future monitoring. Following from this estimation, it has been calculated that 2017 may have seen rail freight in the region of 640,000 tonnes overall.

Indicator 20: The volume of goods to or from the region carried by rail freight (2017)			
Name of Company	Direct Rail Services Ltd	Colas Rail	DB Cargo
Details of Contents	Supermarket grocery containers	Powdered cement	Calcium carbonate and clay slurry
Route	Mossend to Aberdeen	Dunbar to Aberdeen	Mossend to Aberdeen
Frequency	7 days per week	6/7 trains per week on average	Once per week on Fridays
Estimated tonnage per month TO North East	20,304	30,000	n/a
Estimated tonnage per month FROM North East	2,030	n/a	1,296

Source: Operator correspondence

9. Coach

Many strategic passenger journeys to, from and within the north east are made by long-distance coach. Several operators are currently running services to or from Aberdeen, including the Megabus/Citylink/Parks of Hamilton consortium and National Express. Maintaining and improving the choice of a coach option for travel will be important in ensuring that the connectivity of the region is maintained.

Indicator 21: Number of coach services per week from the north east direct to key locations	
Baseline 2007: Direct services per week to: Edinburgh - 0 Glasgow – 111 (3hrs 15) Inverness 86 (3hrs 51)	London – 14 (12hrs) Manchester – 7 (8hrs 20) Newcastle – 0 Birmingham - 0 **Total Services per week: 218**
2012 (5 years from baseline):	**Total Services per week: 275**
2017 (10 years from baseline):	**Total services per week: 533**
2018:	**Total services per week: 464**
2019:	**Total services per week: 384**
2020 (please note numbers reflect services in operation before impact of COVID-19. National Express are not included in the figures) Edinburgh – 132 (Citylink, Megabus & Parks of Hamilton) Glasgow – 153 (Citylink, Megabus & Parks of Hamilton) Inverness – 27 (Stagecoach Service 10) London – 21 (Megabus) Manchester – 14 (Megabus) Newcastle – 14 (Megabus) Birmingham – 7 (Megabus) **Total services per week: 368** % change since 2007 baseline: +69% The above services include direct and connecting services where the connection is guaranteed and through tickets are available. As a different source was used to obtain the figures and not all operators were able to be included, these figures cannot be directly compared to previous years.	
Target 21: To increase the number of bus and coach services to key destinations by 10% every five years (i.e. services from Aberdeen to seven key destinations increasing from 218 services in 2007 to 285 services per week by 2021).	

Source: Operator timetables

Although there has been a recent reduction in the number of long-distance coach services, the number of services per week is still currently above target, with the majority of the identified key destinations having increases since the Baseline. It should be noted that much of the reduction in service numbers in 2019 will be, in part, due to a correction in the assessment of Inverness services (as this previously included services that connected in Perth). Whether 2020 shows a further reduction in services is unclear due to the current COVID-19 outbreak making analysis of operator timetables challenging. It will be important to assess the impact of the situation following relaxation of the lockdown measures, as this could have significant implications for future years.

10. Bus

Please note that due to the ongoing COVID-19 outbreak impacting on operators' services, several parts of this section have not been updated. It will be important to assess the impact of the situation following relaxation of lockdown measures, as there are likely to be significant implications for future years.

Bus Usage

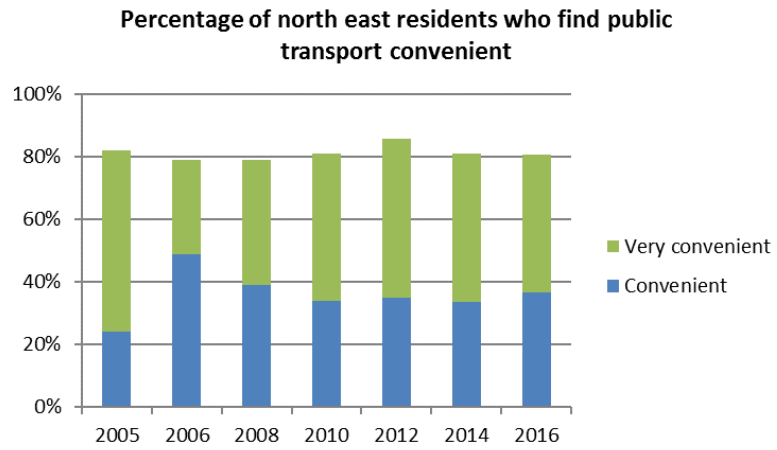
Nestrans continues to work with the two major bus operators and two local authorities as part of a voluntary quality partnership agreement. Due to a change in the way the figures are recorded through the quality partnership, in order to avoid double counting, it is not possible to directly compare bus patronage figures for years prior to 2015/16. There has however been a reduction in paying passengers between 2015/16 and 2017/18.

The Local Authority and Bus Operators Forum relaunched the Voluntary Quality Partnership in August 2018, forming the Bus Alliance. A baseline document, the State of the Network report was published in 2019, with a five-year action plan published in spring 2020. Actions primarily aim to reverse the trend of declining patronage, although may require some re-evaluation depending on the impacts realised following the COVID-19 outbreak.

Indicator 22: The number of people using buses in the north east.			
	Paying customers	Concessions	Total
2015/16	19.4 million	10.4 million	29.9 million
2016/17	18.1 million	10.5 million	28.6 million
2017/18	16.3 million	10.2 million	26.5 million
% change since 2015/16	-15.9%	-2.4%	-11.2%
Target 22: To increase the number of bus passenger journeys by 2021.			

Source: First, Stagecoach, Aberdeen City Council and Aberdeenshire Council

Indicator 23: The percentage of north east residents who find public transport convenient.



% change on 2005 baseline	Very Convenient: -14% points	Convenient: +13% points	Total: -1% point

Target 23: To maintain 80% of passengers finding public transport convenient or very convenient.

Source: Transport and Travel in Scotland, Scottish Household Survey

Following removal of the question on public transport convenience from the Scottish Household Survey, indicator 23 is no longer able to be updated. Results from this indicator have been partly superseded by results from the Transport Focus Bus Passenger Satisfaction Survey.

Bus passenger satisfaction

Transport Focus undertake an annual survey on bus passenger satisfaction in Scotland. In order to ensure a large enough sample to produce reliable results, Nestrans funds additional surveys in Aberdeen City and Aberdeenshire. This replaces earlier surveys undertaken by Nestrans and the Local Authority Bus Operator Forum across the region.

Indicator 24: The percentage of north east residents who were satisfied with public transport

How satisfied were you with the overall service that you experienced on your most recent bus trip?

North East

	2014	**2016**	**2017**	**2018**	**2019**
Very Satisfied	n/a	38%	40%	42%	44%
Fairly satisfied	n/a	48%	46%	47%	42%
Percentage satisfied or very satisfied	**87%**	**86%**	**87%**	**89%**	**86%**

Target 24*:* To maintain proportions in the north east who were satisfied or very satisfied with their last bus trip at 80% or more through to 2021.

Source: Transport Focus Bus Passenger Satisfaction Survey in Scotland, 2019

As can be seen from the indicator above, overall satisfaction has remained relatively static in the north east since 2014, although it has seen increases in the percentage of people who are

'very satisfied'. The percentage of people that state they are dissatisfied increased slightly between 2018 and 2019, from around 3% to 5%.

Reliability and punctuality of buses

Both First and Stagecoach publish data relating to reliability and punctuality. The table below shows that although reliability (i.e. the number of services operated) remains high for both operators, punctuality (i.e. those running on time) is currently below the target of 95% of buses departing on time set by the Traffic Commissioner[3].

Indicator 25: Reliability and Punctuality				
	Reliability (% of miles operated)		**Punctuality (% buses starting their route on time)**	
	First	**Stagecoach**	**First**	**Stagecoach**
2010	99.5%	99.9%	86%	89%
2016	99.8%	99.7%	95%	84%
2017	97.3%[4]	99.3%	94%	86%
Target 25a: *To secure 99% reliability of bus services run in the north east through to 2021.*				
Target 25b: *To secure 95% punctuality (no more than one minute early or five minutes late) for bus services within the north east through to 2021.*				

Looking at the table above, it should be noted that the technical figures provided by the operators and the perception of passengers are not always in sync. The table below shows that passenger satisfaction rates the punctuality and waiting time of buses as lower than the standards being recorded by the operator. This could be due to reductions in frequency leading to longer waiting times at the bus stop or expectations greater than the Commissioner's standard. However, it should be noted that indicator 25 will require updating before a full comparison between the technical figures and satisfaction figures can be compared to assess whether there is a correlation in recent years.

How satisfied were you with the punctuality of the bus that you experienced on your most recent bus trip?

	2014	**2016**	**2017**	**2018**	**2019**
Very Satisfied	n/a	37%	38%	39%	37%
Fairly satisfied	n/a	33%	34%	34%	33%
Percentage satisfied or very satisfied	**79%**	**70%**	**72%**	**73%**	**70%**

How satisfied were you with the length of time waiting for the bus that you experienced on your most recent bus trip?

	2014	**2016**	**2017**	**2018**	**2019**
Very Satisfied	n/a	35%	36%	39%	37%
Fairly satisfied	n/a	36%	37%	36%	33%
Percentage satisfied or very satisfied	**81%**	**71%**	**73%**	**74%**	**70%**

Transport Focus Bus Passenger Satisfaction Survey in Scotland, 2019

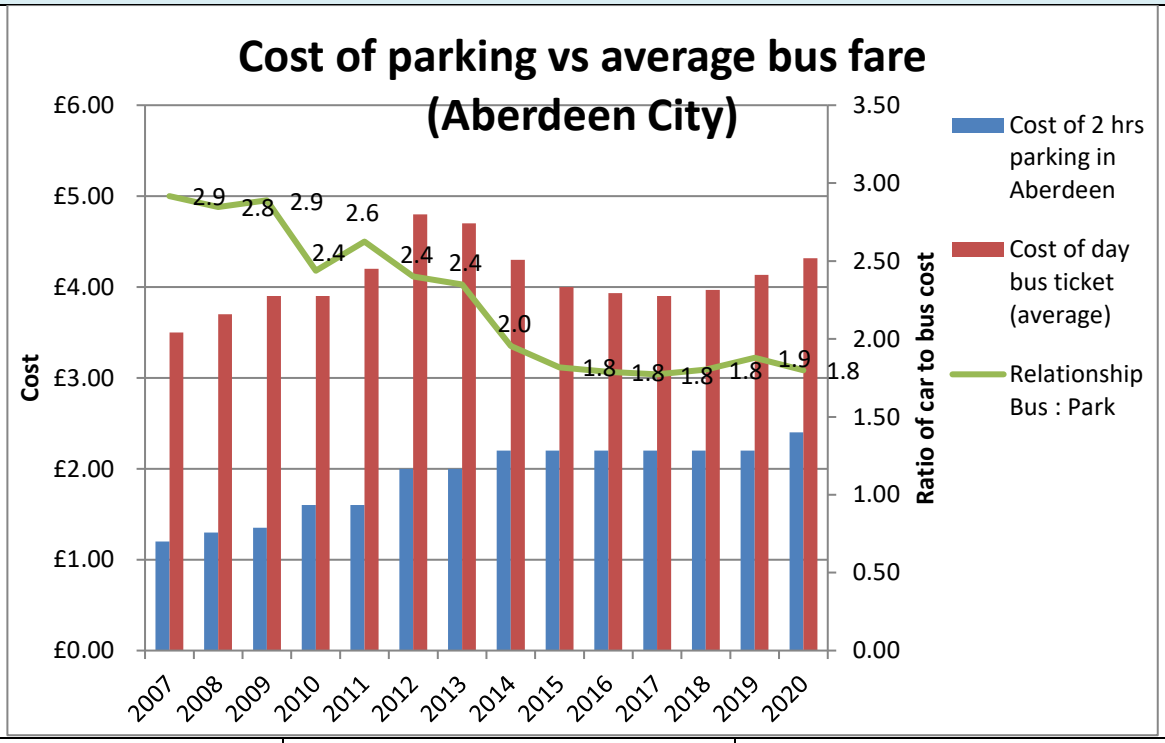
[3] On time is defined by the Traffic Commissioner as being within the window of tolerance of 1 minute early to 5 minutes late.

[4] This may be in part due to drivers strike in early 2018.

Cost of bus services

As a key determinant of mode choice, this report monitors the respective prices of City Centre parking and of average daily bus fares. Indicator 26 shows that whilst daily bus fares have become more competitive since 2012, car parking charges have remained relatively static. Although the relative cost of bus:parking reduced between 2007 and 2015, this has since stalled. Car parking prices were increased in 2020 to £2.40 in the main city centre car parks. It should be noted that a cheaper bus fare for First Bus is available if purchased through the m-ticket app. However, this does not reduce the overall ratio between bus fares and car parking.

Indicator 26: To monitor the price of car parking in Aberdeen City Centre relative to bus fares, by comparing a ratio of 2hrs off-street parking in a Council multi-storey car park: cost of peak daily ticket on city buses.



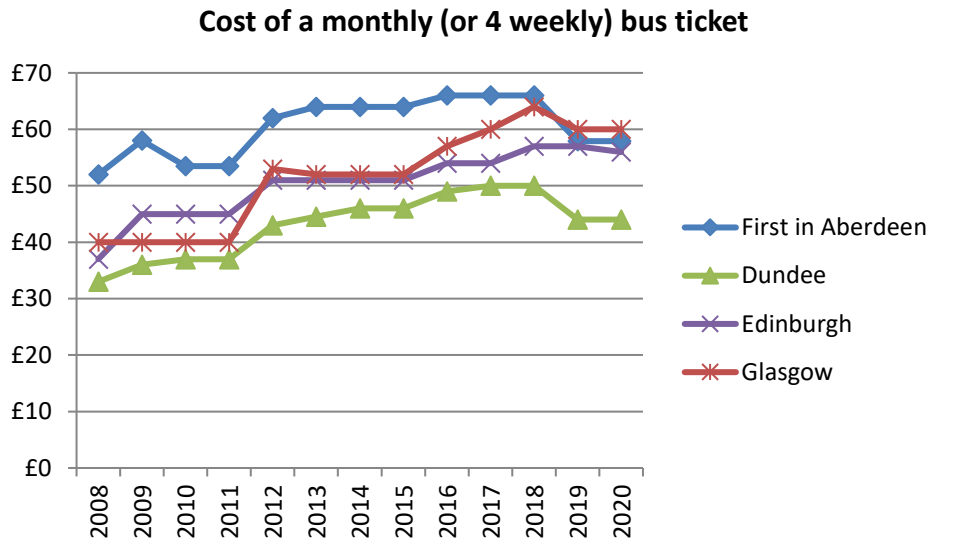
% change in cost on 2007 base	Cost of 2 hrs parking: +100%	Cost of bus day ticket: +23%

Target 26: *To reduce the differential between the cost of parking and bus travel to a factor of no more than 1.5 by 2021.*

Source: Aberdeen City Council, Stagecoach, First Aberdeen & Grasshopper

Monthly bus season tickets are also compared to Scotland's other main cities. Whilst Aberdeen remains amongst the most expensive for a monthly ticket, the gap between the cities has narrowed with the Aberdeen ticket reducing in real terms. As of 2020, with all cities now offering direct debit, online and/or m-ticket options, the graph below now represents the cheapest ticket offering for each area. Taking this into account Aberdeen is cheaper than Glasgow and is similar to Edinburgh for ticket price.

Indicator 27: To compare cost of monthly (or four weekly) bus ticket in Aberdeen with other Scottish cities.



% change on 2008 baseline	Aberdeen (First): +11%	Dundee: +33%	Edinburgh: +51%	Glasgow: +50%

Source: First Aberdeen, Stagecoach, Travel Dundee, Lothian Buses and First Glasgow

Park and Ride

The north east has three well established bus-based Park & Ride sites, at Bridge of Don and Kingswells in Aberdeen City and at Ellon in Aberdeenshire, along with a smaller mini-park and ride to the south of Aberdeen at Newtonhill. Craibstone Park and Ride opened to the public in June 2017 to the west of Aberdeen on the A96. The RTS proposes further Park & Ride sites, with a site at Portlethen on the A92 having secured planning permission in principle. Aberdeenshire Council are also progressing the development of mini park & ride hubs on the A947 corridor.

Nestrans conducts surveys at park and ride sites to better understand the occupancy of the car parks in order to supplement the information provided regarding overall patronage.

A reduction in service to Bridge of Don has led to a drop in car park usage, although there may be an opportunity to create a pedestrian link from the park and ride to the main road to increase options available to commuters. Kingswells continues to see greater usage following the increase in frequency of services to its site. Observations at Kingswells Park and Ride suggest that the site is used by a high proportion of leisure travellers rather than commuters due to the fluctuation in usage throughout the day. In 2020 it was announced that services to Craibstone Park and Ride were to be stopped following three years of low usage.

Indicator 28: The number of passengers on park and ride bus services

Park & Ride Car Park Usage

Number of spaces in use (typical day)

	Capacity	2015	2016	2017	2018	2019	Change 2015-19
Bridge of Don	532	182	123	146	56	37	-79.5%
Ellon	300	169	172	182	163	150	-21.9%
Kingswells	915	118	103	213	189	223	88.9%
Craibstone	996	n/a	n/a	14	7	14	n/a
Newtonhill	46	5	3	14	10	19	280%
Total	2,747	469	398	555	415	443	-42.1%

Target 28a: To increase the number of park and ride sites to five by 2021.

Target 28b: To double patronage on Park & Ride services by 2021.

Source: Aberdeenshire Council, Aberdeen City Council, Nestrans

Integrated ticketing

Indicator 29: The ability to transfer from one transport company to another with minimum hassle and using a single ticket	
2014/15	A multi-operator ticket 'The Grasshopper', was launched on 8th May 2014 and enables passengers to purchase one ticket for travel on First and Stagecoach services within zones 1-3 and a number of smaller operators in Aberdeenshire.
2015/16	The Grasshopper ticket was extended to a region-wide scheme in 2015, across six fare bands. It is an operator led scheme incorporating 9 local bus operators.
2016/17	The regional fares and ticketing strategy was refreshed in 2016. This includes a number of actions relating to the development of integrated and smart ticketing. In August 2016, the Grasshopper scheme was relaunched as Scotland's first multi-operator bus smartcard.
2019/20	As part of the new Bus Alliance Action Plan published in April 2020, there is ambition to improve the Grasshopper offering by exploring opportunities for smart and mobile ticketing as well as contactless ticket options and new ticket types. Work is currently ongoing to develop an online retail solution for purchasing Grasshopper tickets, due to be launched in 2020.
Target 29: To implement an integrated ticketing scheme including multi operators within the north east by 2017.	

Source: http://grasshopperpass.com/

11. Active Travel

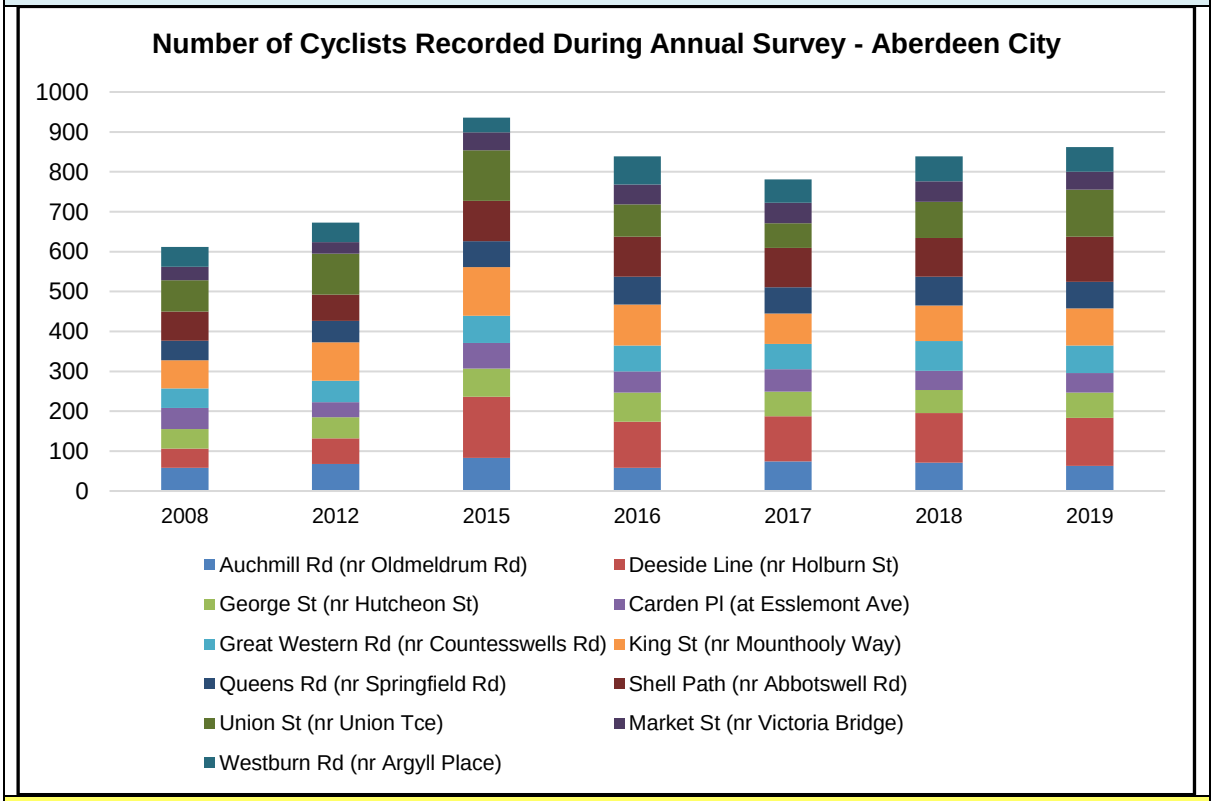
Cycling

In 2008, Aberdeen Cycle Forum first carried out a cycle count survey at 11 points across the city, on key routes and at strategically important junctions, during the morning peak on a weekday morning between 0700 and 0900 hours (the count ran from 0730 to 0900 hours in 2008). The count has continued annually (in May) and, in 2016, the number of locations surveyed was increased to 16.

The 2019 count showed, in line with previous surveys and research papers, that the number of female cyclists (19%) continues to be markedly under-represented. Due to the CoVid19 crisis and lockdown, the 2020 count has been deferred and is scheduled to be conducted in September.

While admittedly only a very brief behavioural snapshot, since 2008, there has been an increase of over 40% in the number of cyclists recorded during these counts.

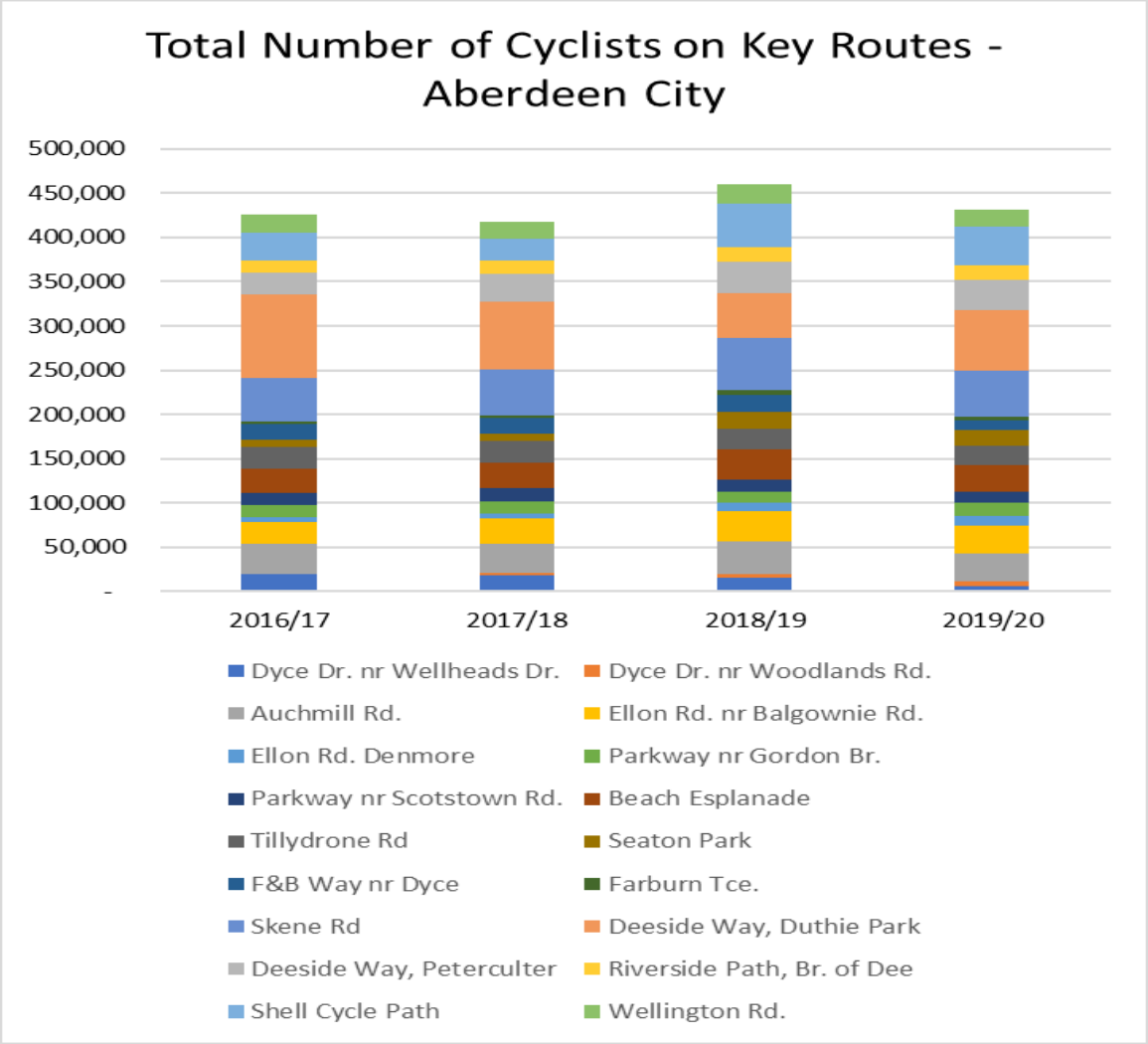
Indicator 30a: Total Number of Cyclists Recorded on Key Routes – Aberdeen City (am peak)



Target 30a*: to at least double the number of cyclists recorded on key routes in peak times in Aberdeen City between 2008 and 2021*

Both Aberdeen City and Aberdeenshire Councils have installed a comprehensive network of automated cycle and pedestrian counters throughout their respective areas. It is hoped that these will provide a reliable evidence-base, from which to measure and monitor behaviour change and analyse modal shift over coming years.

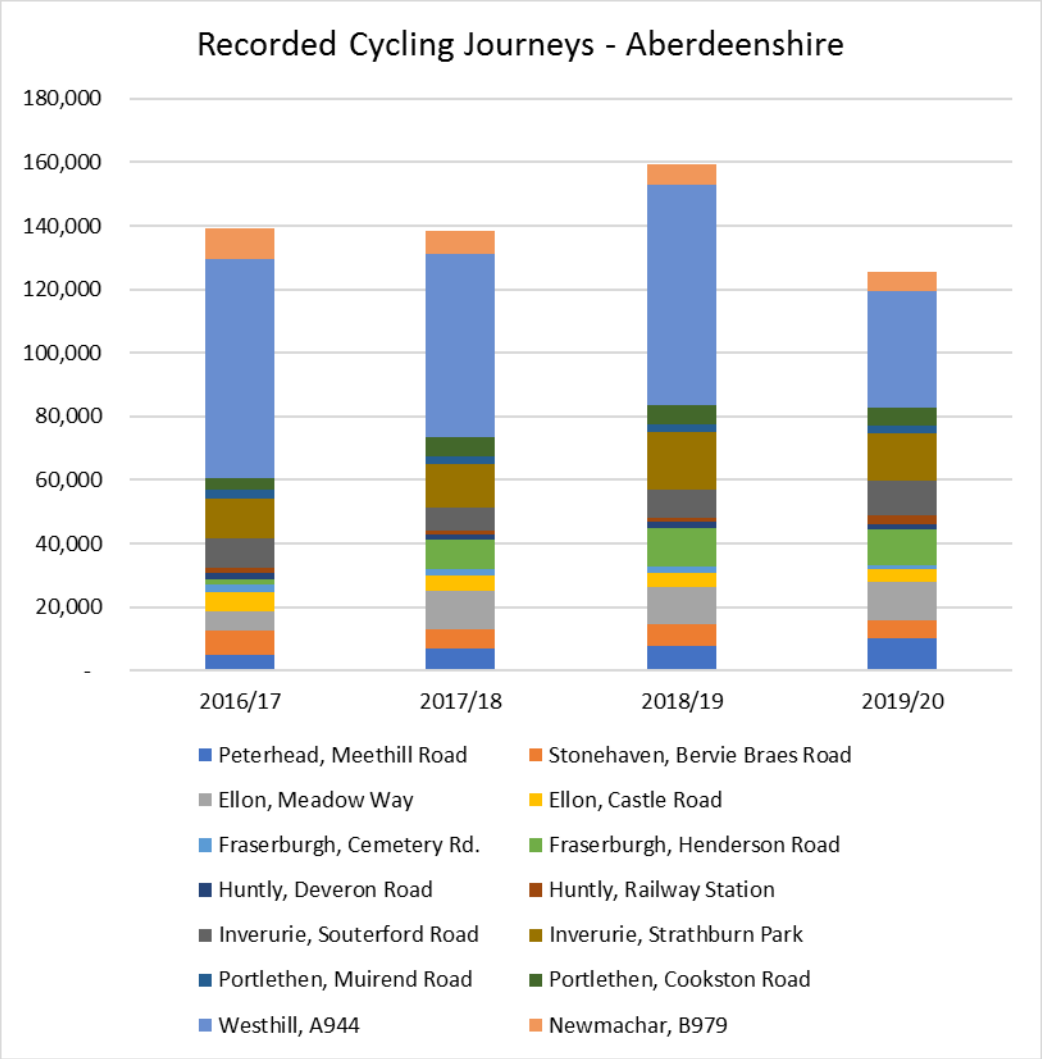
Indicator 30b: Total Number of Cyclists Recorded on Key Routes – Aberdeen



There are a total of 18 cycle counters in Aberdeen, which in total recorded 432,120 cyclists in 2019/20. This is an increase of 1.6% since 2016/17, although is down on the previous year.

The highest count was on the Deeside Way at Duthie Park, with over 68,000 cyclists – an average of 187 per day.

Indicator 30c: Total Number of Cyclists Recorded on Key Routes – Aberdeenshire



Target 30c: to at least double the number of cyclists recorded on key routes in Aberdeenshire between 2016/17 and 2021

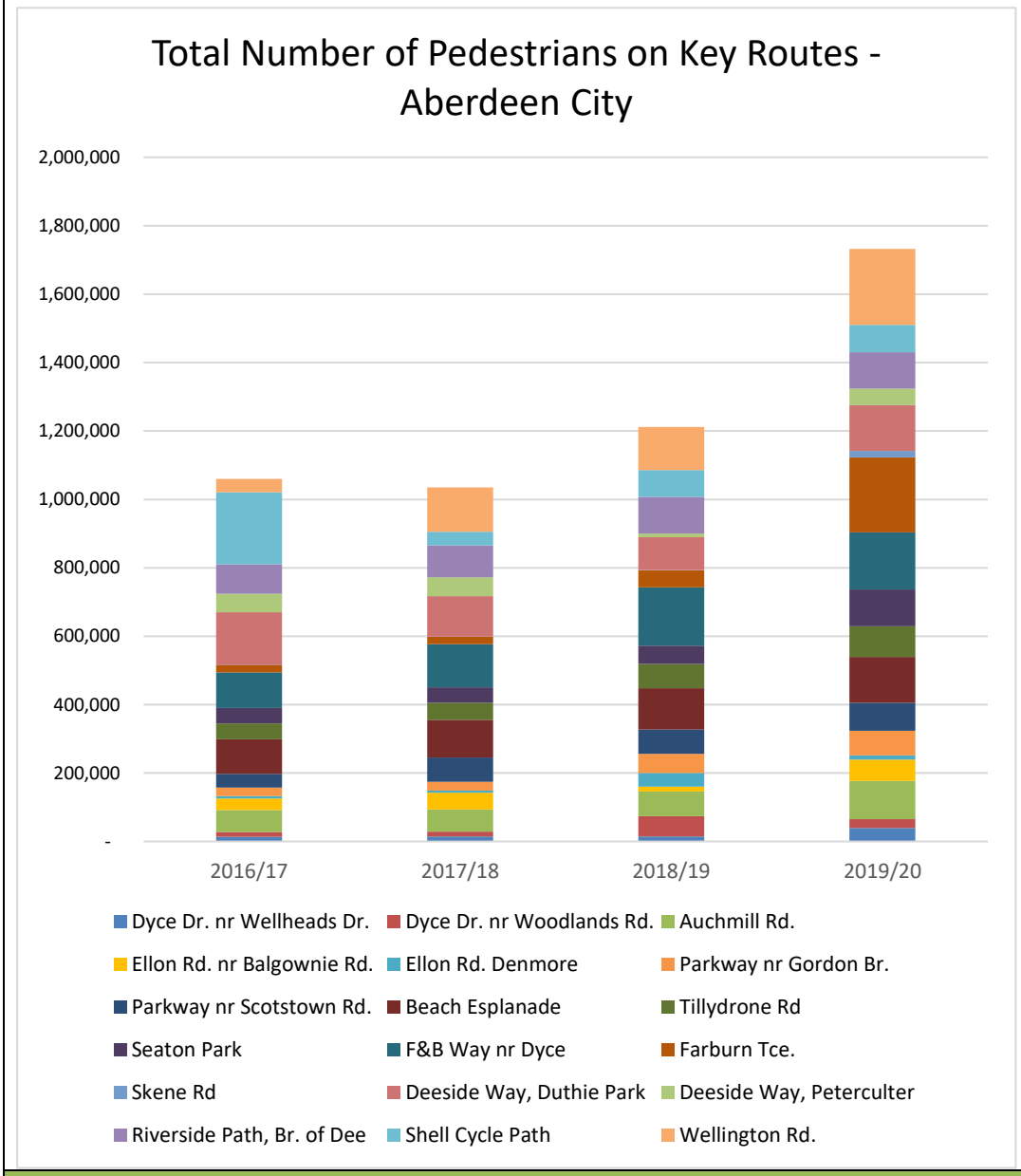
There are 14 cycle counters across Aberdeenshire and in 2019/20 they recorded a total of 125,275 journeys. This is 9.9% fewer than in 2016/17.

The busiest route is the A944 near Westhill, which recorded some 36,800 cycle trips in 2018/19. Despite remaining the busiest route, this represents a drop of 47% on previous years. Whether this represents a new trend following the opening of the AWPR and safety concerns in relation to the Kingswells junction will require monitoring in future years to determine and to assess why there has been such a significant change in usage of the route.

Walking

There are also a number of pedestrian counters across the region.

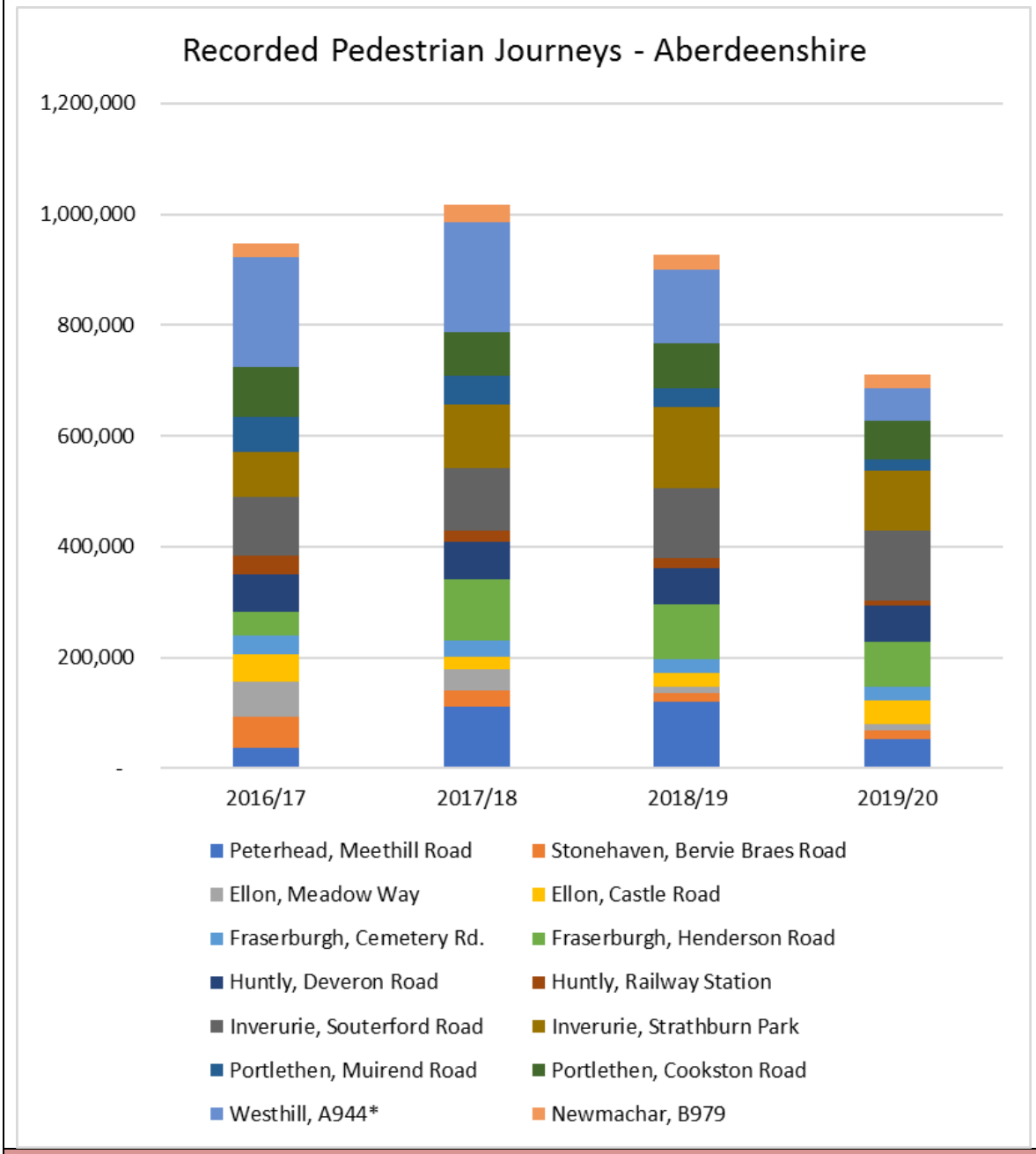
Indicator 31a: Total Number of Pedestrians Recorded on Key Routes – Aberdeen City



Target 31a: to increase by at least 25% the number of people recorded walking on key routes in Aberdeen City between 2016/17 and 2021.

Across 18 key routes in Aberdeen in 2019/20, 1.765million walkers were recorded, an increase of 67% since 2016/17. The highest numbers recorded were at Wellington Road and Farburn Terrace, both with around 220,000 pedestrians, over 600 per day.

Indicator 31b: Total Number of Pedestrians Recorded on Key Routes – Aberdeenshire



Target 31b: to at least increase by 25% the number of people recorded walking on key routes in Aberdeenshire between 2016/17 and 2021.

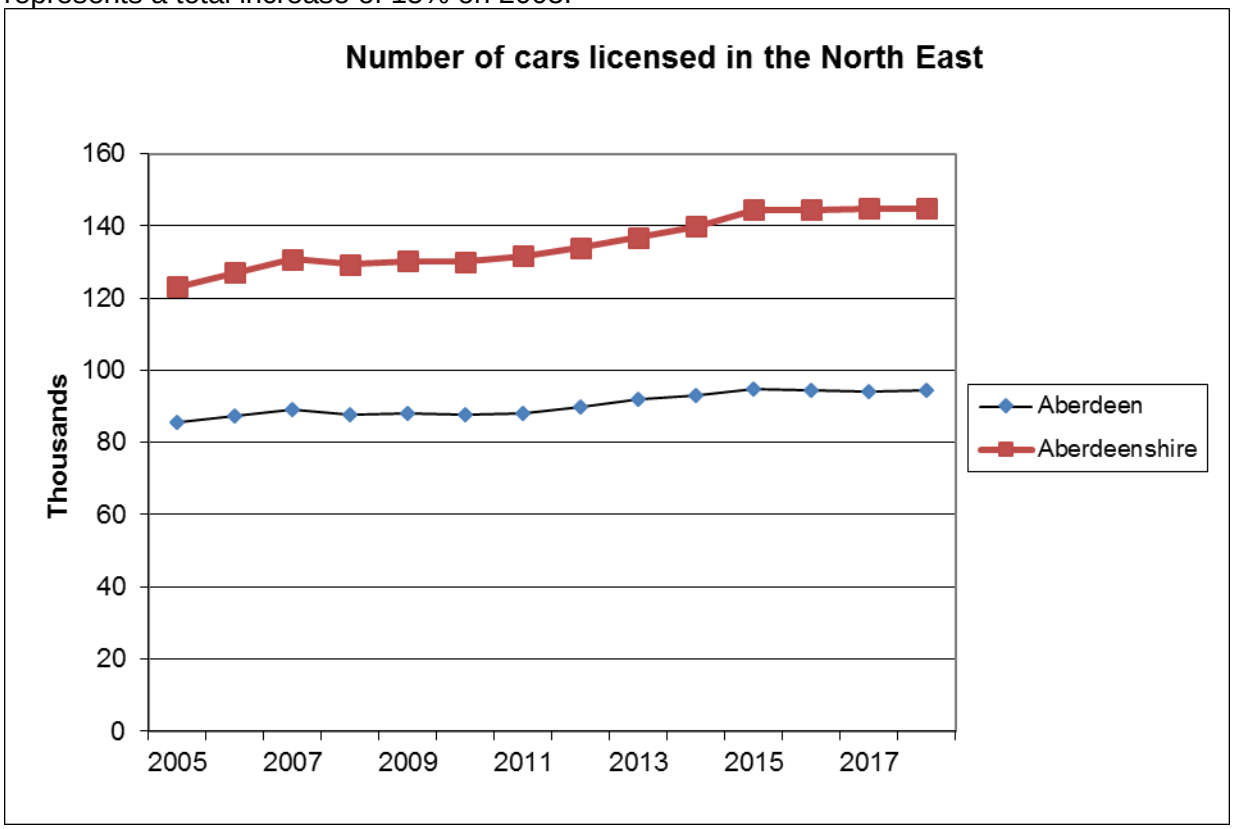
For the 14 counts in Aberdeenshire, a total of 711,000 walkers were recorded. This is a reduction of 25% from 2016/17. The busiest route was Souterford Road in Inverurie with over 125,000 walkers recorded, an average of 343 per day. This is 19% higher than recorded in 2016/17.

12. Mode split and Personal Travel

Car Ownership

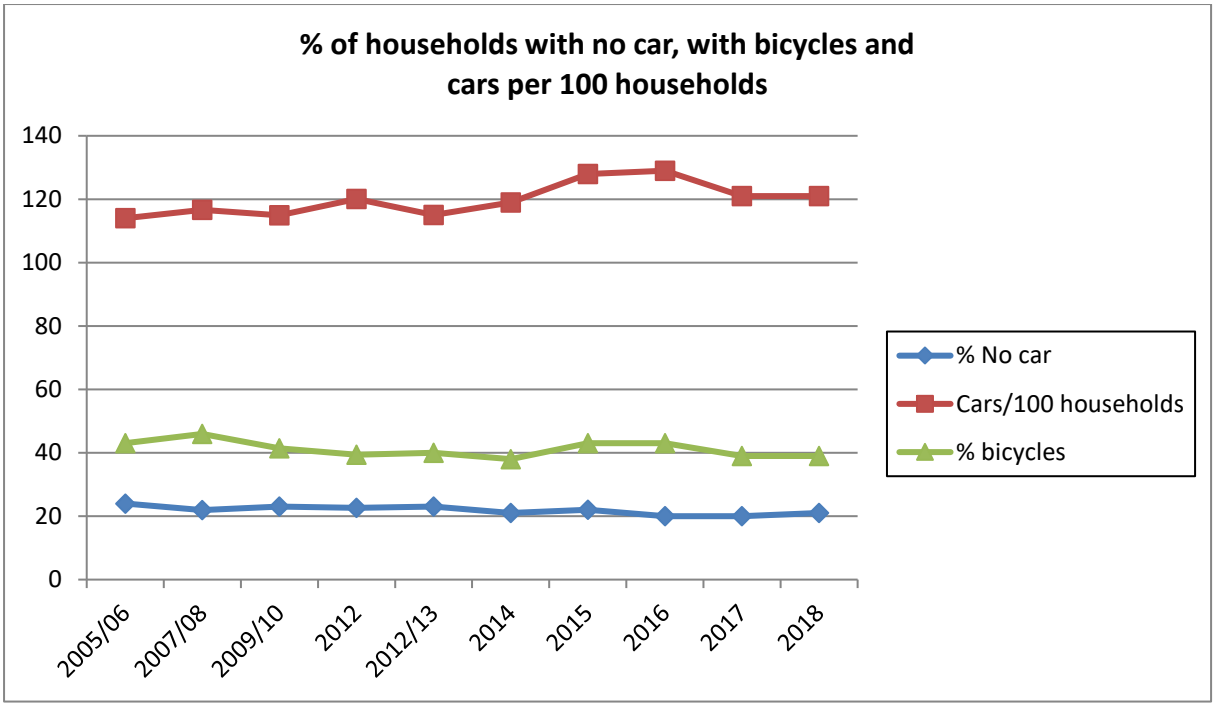
With over 239,000 cars, the north east has more cars and vans than households, yet 21% of households do not have access to a vehicle.

There were 94,400 cars registered in Aberdeen and 144,900 registered in Aberdeenshire at end December 2018 (Source: Scottish Transport Statistics). Over the entire North East, this represents a total increase of 15% on 2005.



Source: Scottish Transport Statistics, 2019

Car ownership is high in the north east, with around 80% of households having access to a car. Aberdeenshire has the joint second highest rate of car ownership in Scotland, with 86% of households having access to at least one vehicle. Car ownership in Aberdeen City has increased from 65% of households in 2005/06 to around 70% in 2018, although has reduced from 73% in 2017. Despite this, some 30% of households in the City and 13% of households in Aberdeenshire do not have access to a car or van. Over the last 5 years, the proportion of households without access to a car in Aberdeen City has remained relatively static at around 27-32%. (Source: Transport and Travel in Scotland, 2018).



Source: Transport and Travel in Scotland, 2018

Indicator 32: The proportion of households in the north east without access to a car or van.			
	Aberdeen	**Aberdeenshire**	**North East**
2005/06	34%	14%	24%
2012	29%	17%	23%
2014	27%	15%	21%
2015	30%	13%	22%
2016	32%	9%	20%
2017	27%	13%	20%
2018	30%	13%	21%

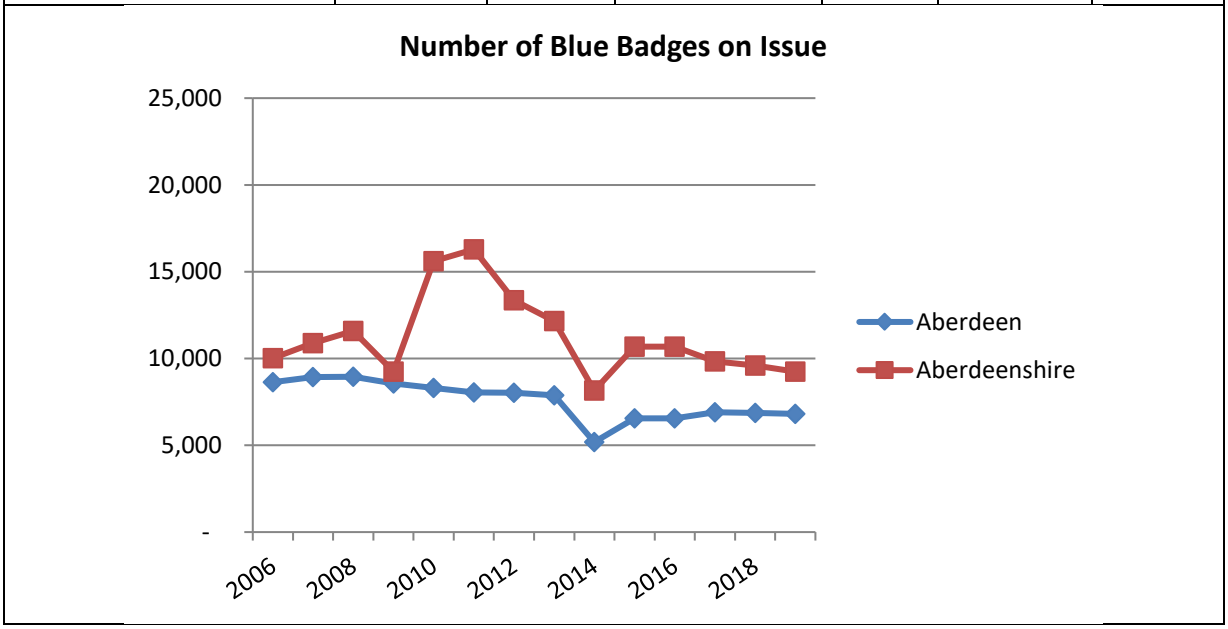
Source: Transport and Travel in Scotland, 2018

Drivers with a Disability

There were 16,072 Blue Badge holders in the north east at the end of March 2019. This represents 5% of cars registered in the region. After a number of years of increases in the number of Blue Badge holders across the north east, there have been reductions in both Aberdeen City and Aberdeenshire since 2011 – a 34% reduction in six years.

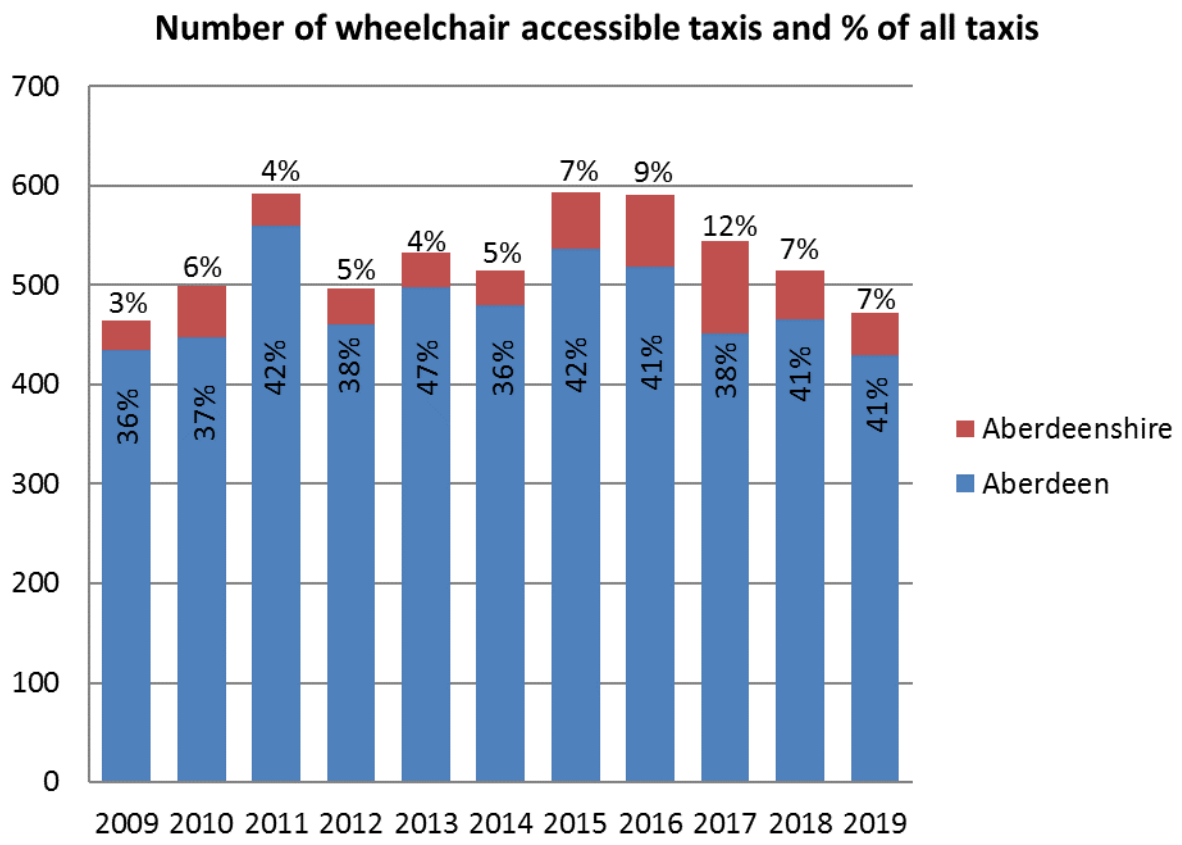
Indicator 33: The number of blue badge holders (and proportion relative to cars registered) in the north east.

	Aberdeen		Aberdeenshire		North East	
	Blue badges	% of all cars	Blue badges	% of all cars	Blue badges	% of all cars
March 2006	8,645	10%	10,024	8%	18,669	9%
March 2011	8,044	8%	16,288	12%	24,332	11%
March 2016	6,643	6%	10,210	5%	16,853	6%
March 2017	6.908	6%	9,838	5%	16,746	6%
March 2018	6,863	6%	9,604	5%	16,467	6%
March 2019	6,820	6%	9,252	5%	16,072	5%



Source: Scottish Transport Statistics, 2019

Indicator 34: The proportion of taxis which are capable of carrying wheelchairs



Target 34*:* To increase the proportion of wheelchair accessible taxis across the north east from 39% in 2009 to at least 50% by 2021

Source: Scottish Transport Statistics 2019

	2009		2015		2019			
	Taxis & Private Hire	Wheel chair Accessible	Taxis & Private Hire	Wheel chair Accessible	Taxis & Private Hire	Wheel chair Accessible	% change no. of taxis 2009-2019	% change accessible 2009-2019
Aberdeen	1,198	435	1,288	537	1,055	430	-12%	-1%
Aberdeenshire	834	29	807	56	622	42	-25%	45%
Total NE	2,032	464	2,095	593	1,677	472	-17%	2%

In 2012, Aberdeen City Council announced a cap in the number of taxi licences and committed to a 100% wheelchair accessible fleet. The original deadline to achieve this was by 2017. Following a consultation in 2018, the deadline has been extended, although Aberdeen City Council remain committed to a fully wheelchair accessible fleet by 2023.

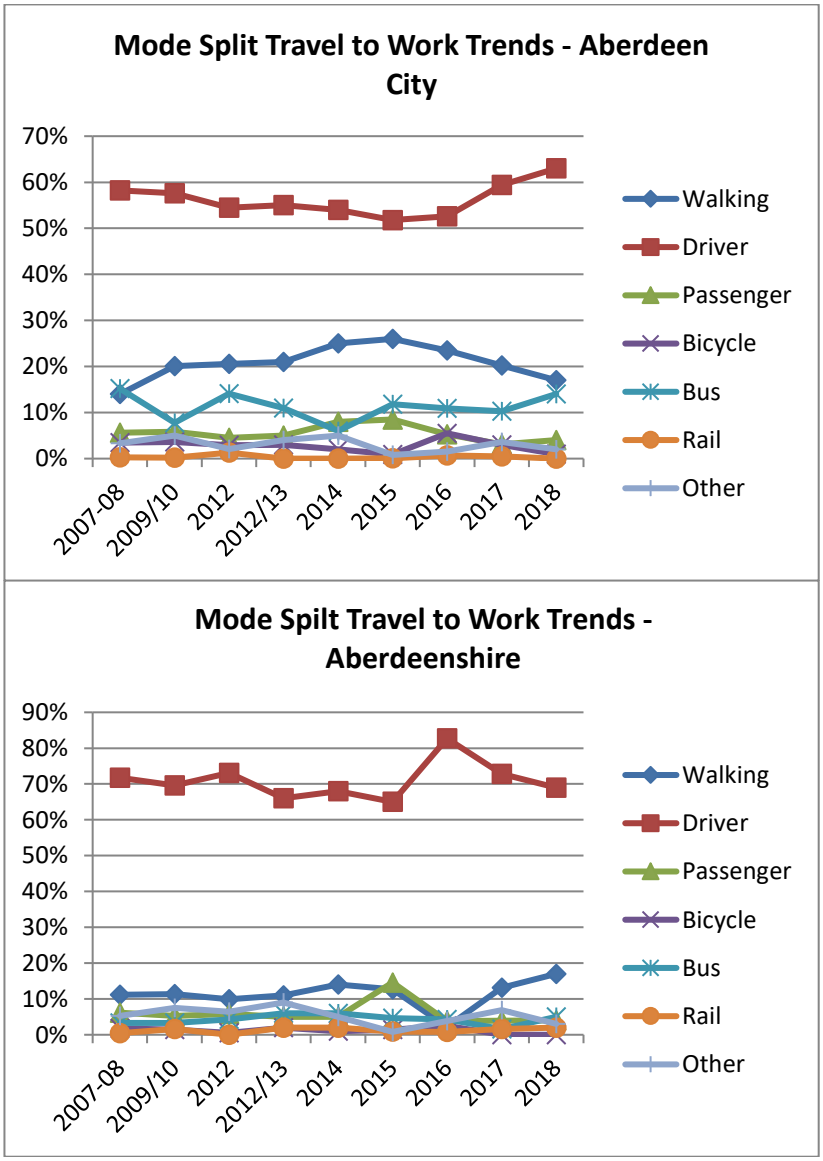
Travel to work

Over half drive to work. Although the proportion has been historically reducing, it has increased in recent years.

Across the north east in 2018, some 66% of employed adults not working from home, drove to work and another 4% travelled as passengers in cars or vans. This compares to 65% and 6% respectively in 2007/08. In Aberdeen City, 63% of residents drive to work (an increase from 59% in 2017), compared to 69% in Aberdeenshire (a reduction from 73% in 2017). 62.9% is the average for Scotland as a whole.

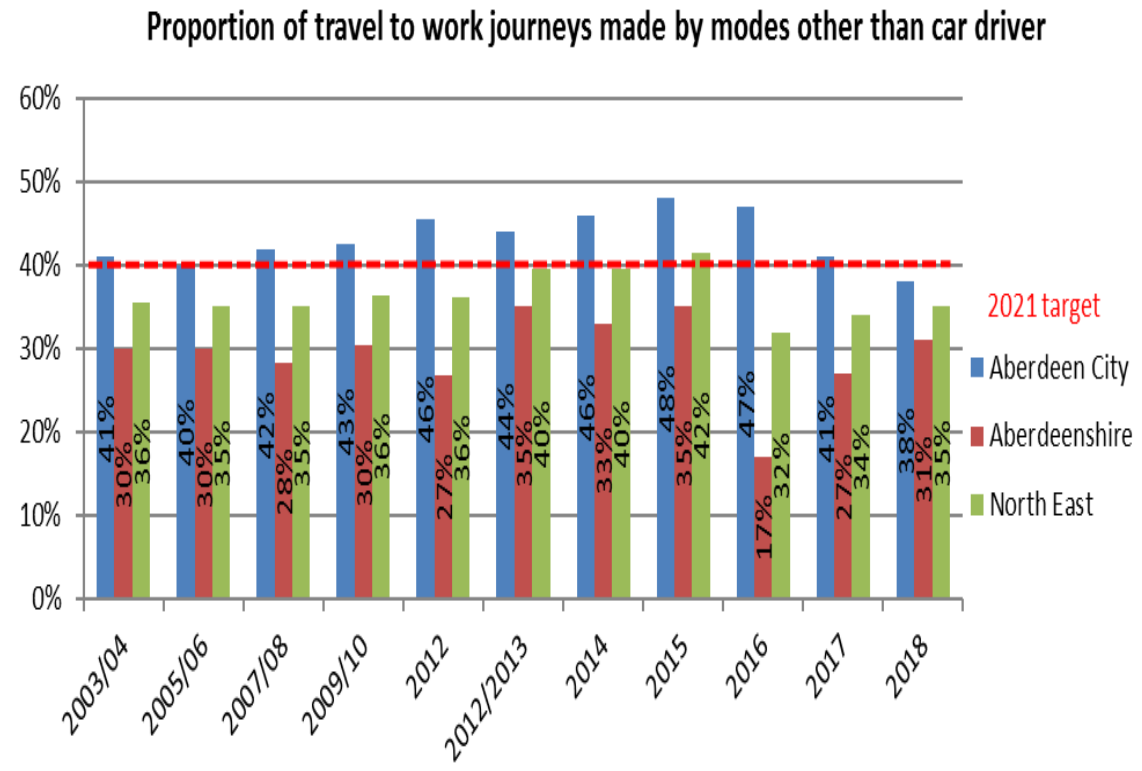
It should be noted that this survey uses small sample sizes, of between 100 and 200 respondents. As such, small changes are liable to make a large impact year on year.

Walking to work in Aberdeen City and Aberdeenshire continues to stay above the average for Scotland as a whole, with both areas at 17% compared to the Scottish average of 12%. In addition to this, bus use in Aberdeen City has also stayed well above the average for Scotland as a whole, at 14%.



Source: Scottish Household Survey Travel Diary Results/Transport and Travel in Scotland

Indicator 35: The proportion of travel to work journeys by modes other than car driver.



% points change on 2003/04 baseline	Aberdeen City: -3 %points	Aberdeenshire: +1 %points	North East: -1 %points

Target 35: To increase the proportion of travel to work journeys by modes other than car driver to 40% across the north east by 2021.

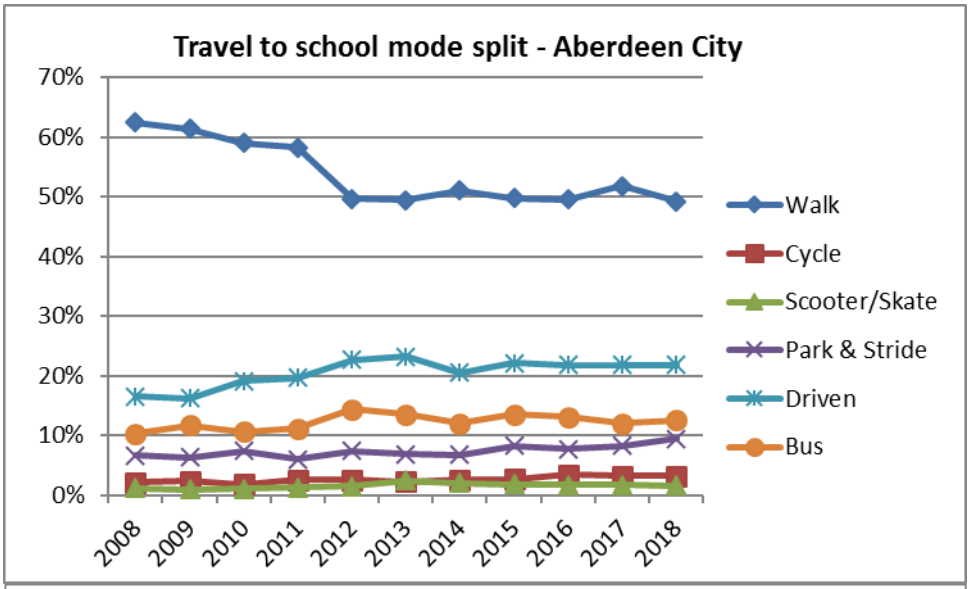
Source: Scottish Household Survey Travel Diary Results/Transport and Travel in Scotland

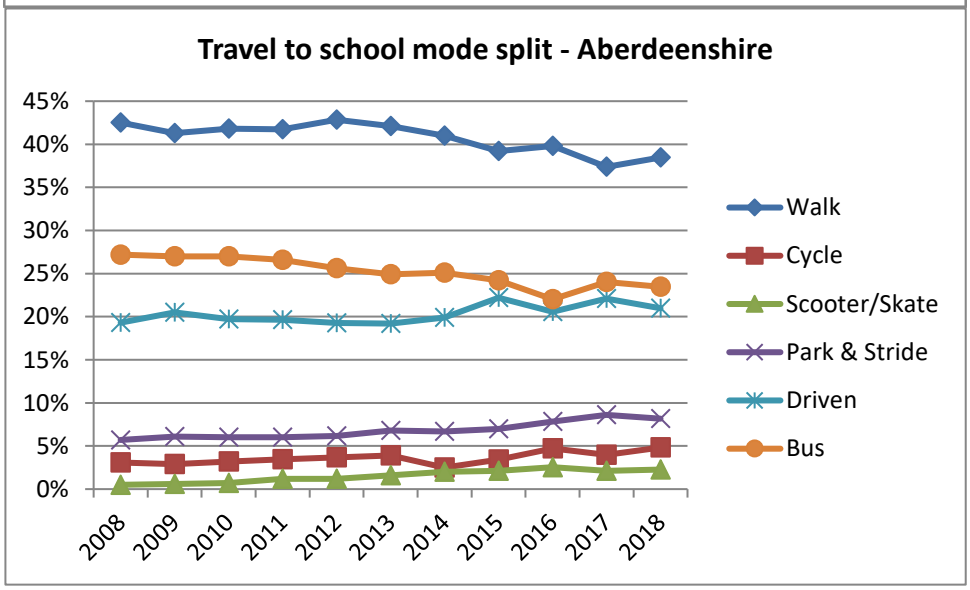
In 2018, both Aberdeen City and Aberdeenshire are below target, although increases in Aberdeenshire have increased the overall result. Given the small sample size used in the survey, future years will help to determine whether this is a sustained trend.

Travel to School

Around half of north east children travel actively to school

Across the north east in 2018, 44% of pupils in full-time education at school usually walked to school, 4% cycled, 18% took a school bus or other bus service, with 21% being driven.





Source: Sustrans Hands Up Survey

Indicator 36: The proportion of children travelling actively to school (walking or cycling).									
	Walking			**Cycling**			**Scooter/Skate**		
	City	**Shire**	**NE**	**City**	**Shire**	**NE**	**City**	**Shire**	**NE**
2003/04 Baseline	59%	48%	**52%**	0%	1%	**1%**	1%	2%	**2%**
2008	62%	43%	**53%**	2%	3%	**3%**	1%	1%	**1%**
2013	49%	42%	**46%**	2%	4%	**3%**	2%	2%	**2%**
2016	50%	40%	**45%**	3%	5%	**4%**	2%	3%	**2%**
2017	52%	37%	**45%**	3%	4%	**4%**	2%	2%	**2%**
2018	49%	38%	**44%**	3%	5%	**4%**	2%	2%	**2%**
% point change since 2003/04 baseline	-10% points	-10% points	-8% points	+3% points	+4% points	+3% points	+1% point	=	=
Target 36: To increase the proportion of children walking and cycling to school to at least 60% by 2021.									

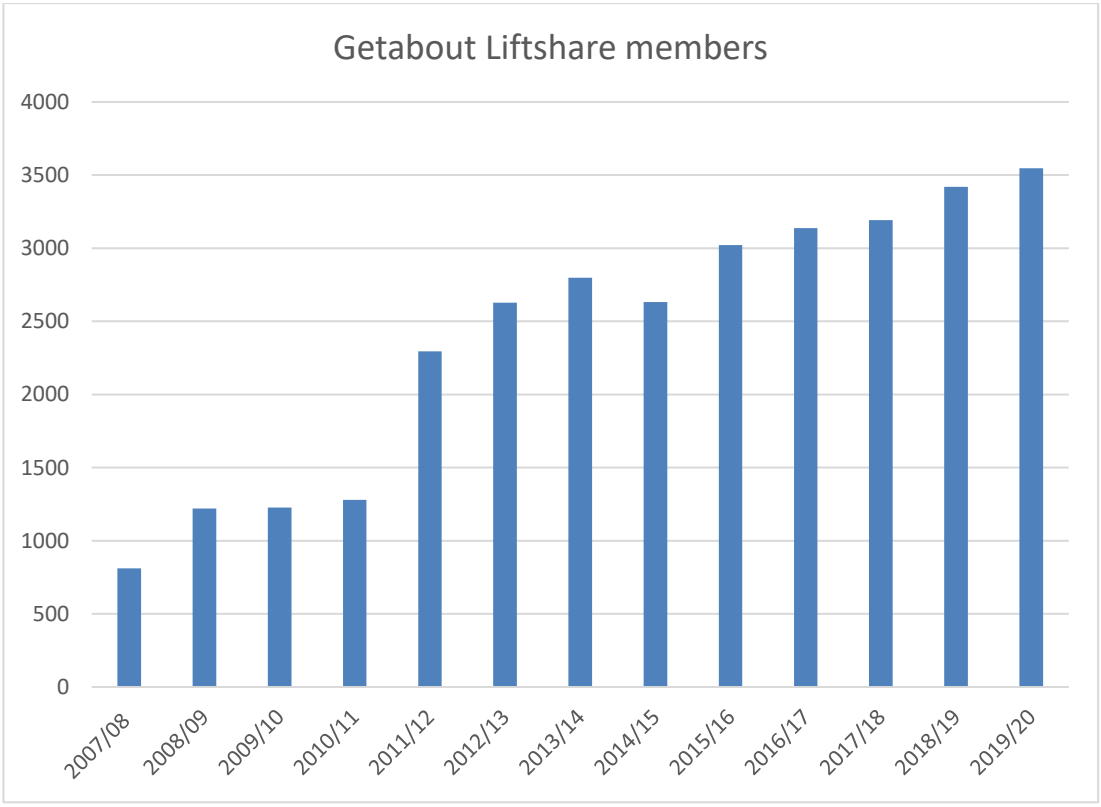
Source: Sustrans Hands Up Surveys

Car Share

Nestrans supports a carshare database https://liftshare.com/uk/community/getabout, which has a number of umbrella organisations and areas within the Nestrans region, using their own private groups within the scheme. Recognising that car use can be a necessity for many users, particularly for people who live or work in rural areas and for employees of organisations that work shift patterns, that don't fit with times for public transport. Nestrans supports the principle of encouraging sharing where possible, particularly for commuting.

Indicator 37: Number of participants in Getabout carshare scheme.		
	Total members	**New members in last year**
2007/08	811	284
2012/13	2,627	348
2016/17	3,138	117
2017/18	3,193	338
2018/19	3,420	245
2019/20	3,547	252
% change on 2007/08 baseline	+337%	-11%
Target 37: *To increase participation in the Getabout car share scheme by an average of 15% each year from 2007/08 to at least 5,000 members by 2021.*		

Source: Getabout Liftshare



Source: Getabout Liftshare

Car Club

The number of cars in the Aberdeen car club scheme has continued to increase since its launch in 2012. Whilst it no longer has a wheelchair accessible vehicle available, the number of electric or alternatively fuelled vehicles has increased.

A car club scheme was also launched in Huntly in September 2015 and currently has two hybrid vehicles in its fleet, with another car due for delivery later in 2020. The scheme currently has 63 registered members, of which 6 are everyday users and 30 are monthly/quarterly users.

Indicator 38: Number of car club members (Aberdeen Co-Wheels)

	Number of cars in the fleet	Number of electric or alternatively fuelled vehicles in fleet	Number of hybrid vehicles in fleet	Wheelchair accessible vehicles	Number of members (organisations & individuals)	Number of drivers registered	% utilisation of the vehicles
2012/13	12	0	n/a	0	104	395	20%
2013/14	26	9	n/a	1	222	642	20%
2015/16	40	21	5	2	561	1,277	23%
2016/17	44 (plus 3 vans)	27	5	2	677	1,524	16%
2017/18	40 (plus 3 vans)	28	5	1	887	1,800	18%
2018/19	44 cars (plus 4 vans)	26	10	0	1,023	1,989	17%
2019/20*	52	27	10	0	TBC	2,252	17%

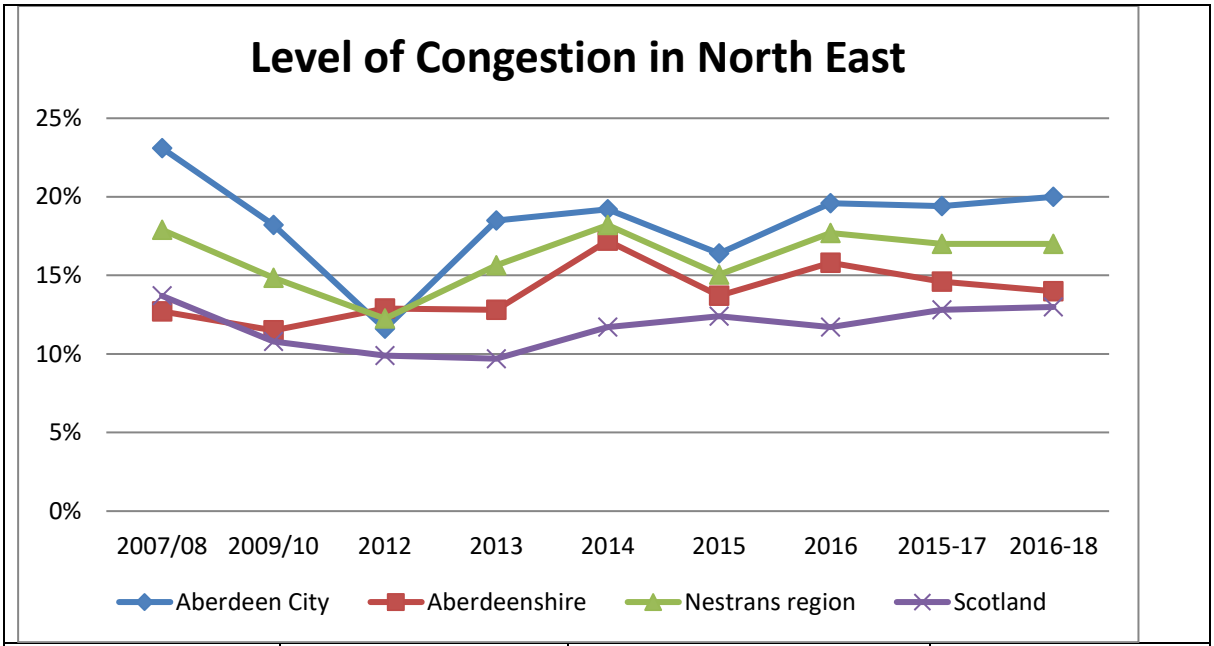
Target 38: To increase the number of drivers registered in north east car clubs by an average of 20% each year from 2012/13 to over 2,000 by 2021.

Source: Co-Wheels Car Club
*As of February 2020

13. Journey times and Congestion

Congestion is a key issue in determining the reliability of journey times and an important indicator of the efficiency of the road network, particularly within the north east.

Congestion



% points change on 2007/08 baseline	Aberdeen City: -3 %points	Aberdeenshire: +1 %point	North East: -1 %point

Source: Transport and Travel in Scotland: Local Area Analysis

As of 2018, the Transport and Travel Statistics Local Area Analysis changed their reporting to a three-year average. Due to this, comparisons with previous years may not provide a true representation. Levels of congestion have increased slightly in the North East as a whole since the 2007/2008 benchmark although they have remained relatively consistent in the last few years.

Indicator 39: The percentage of driver journeys delayed due to congestion			
	Aberdeen City	**Aberdeenshire**	**North East**
2007/08	23%	13%	18%
2009/10	18%	12%	15%
2012	12%	13%	12%
2013	19%	13%	16%
2014	19%	17%	18%
2015	16%	14%	15%
2016	20%	16%	18%
2015-2017	19%	15%	17%
2016-2018	20%	14%	17%
Target 39: *to reduce the proportion of journeys delayed due to congestion in the north east to less than 10% by 2021*			

Source: Transport and Travel in Scotland: Local Area Analysis

Journey Times

Since a key determinant of choice of mode of transport is relative journey time, Nestrans gathers annual data to monitor car and public transport journey times on 12 key routes at peak times in the North East. The aggregated car and public transport journeys for the 12 sample routes can be compared for differences in journey times on the two modes and are reflected in Indicator 40.

As the 2020 data was captured in early 2020, the decrease in car times relative to 2019 may reflect some reduced traffic and increase in public transport times due to the COVID-19 pandemic lockdown. Despite this caveat, the 2020 data adds to a near consistent trend of a reduction in journey times for cars and an increase in journey times for public transport. The increase in public transport times amounts to over 2 hours since 2008, albeit with a recent reduction from a peak in 2018. Additionally, average speeds for cars is over twice the speed of public transport for equivalent journeys (it should be noted that public transport journeys include connection times, which reduces the average speed).

A lack of direct rail routes in the 12 sample journeys highlights the challenges of bus-dependent public transport within the North East.

Despite increasing mileage on a number of routes, the opening of the AWPR has contributed to a change in journey times for both car and public transport. In 2018 public transport journey times averaged just under 18mph, the slowest to date. With the opening of the AWPR, this has increased to 19mph, with Stonehaven to the Airport seeing the largest decrease in journey time.

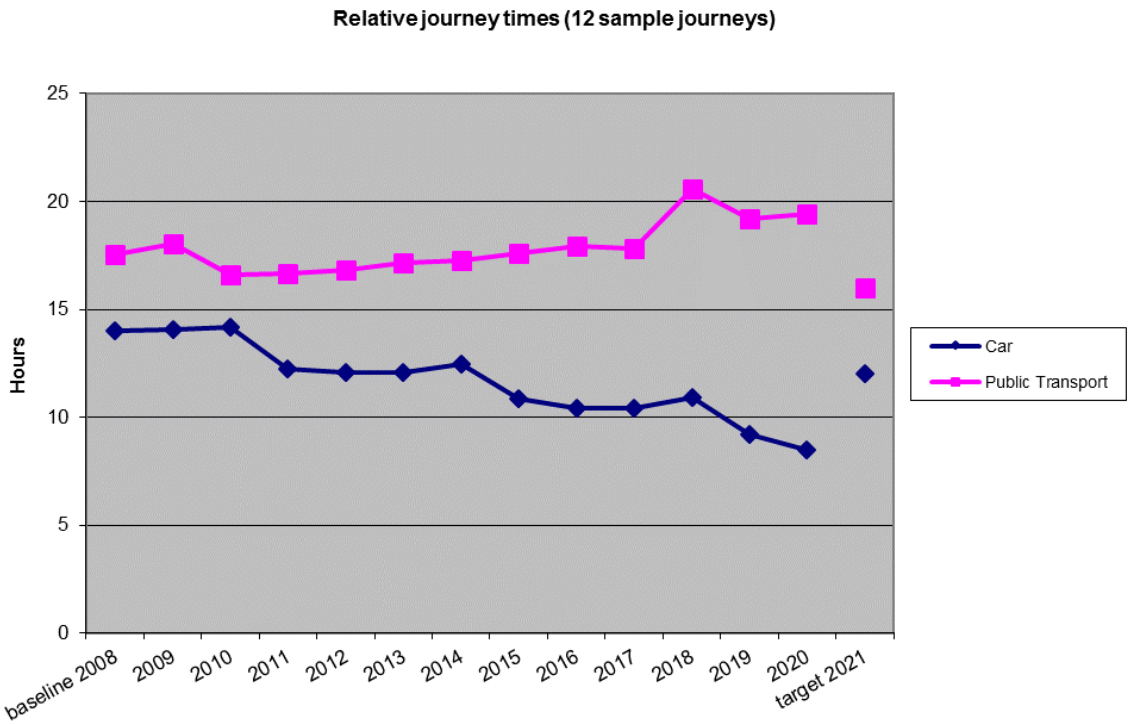
Estimated Journey Times		April 2020	
	Miles	Car	Public Transport*
Fraserburgh to St Cyrus	75	1hour 30min	3hours 21min
Peterhead to Banchory	52	1hour 05min	3hours 37min
Banff to Foresterhill	45	1hour 07min	1hour 51min
Turriff to RGU	37	1 hour	2hours 11min
Bridge of Don to Dyce	7	13 minutes	37 min
Stonehaven to Airport	18	23 minutes	1hour 02 min
Braemar to Woodhill House	55	1hour 18min	2hours 51min
Huntly to Union Street	39	58min	50 min
Seaton to Altens	5	14 minutes	47 min
Portlethen to Kirkhill	17	22 minutes	1hour 02min
Tillydrone to East Tullos	5	15 minutes	45 min
Cults to Balmedie	16	24 minutes	48 min
TOTAL DISTANCE	371		
Total journey time		08hours 49m	19 hours 42 min
Average journey speed		42 mph	19mph

*shortest journey time starting between 0800 and 0959, weekday[5]

Source: www.Google.co.uk/maps and www.travelinescotland.com

[5] The journey times in this chart should be treated with caution. The journey planning website transportdirect was previously used, but has been replaced by Travelinescotland info.

Indicator 40: To monitor average journey speeds by car and public transport for 12 typical journeys across the north east (total distance 371 miles).				
	Total journey time across 12 journeys		Average journey speed across 12 journeys	
	Car	Public Transport	Car	Public Transport
April 2008	13hrs 59	17hrs 31	27 mph	21 mph
April 2012	12hrs 05	16hrs 49	30 mph	23 mph
March 2017	10hrs 25	17hrs 48	35 mph	21 mph
May 2018	10hrs 56	20hrs 34	34 mph	18 mph
March 2019	09hrs 12	19hrs 10	40mph	19mph
April 2020[6]	8hrs 49	19hrs 42	42mph	19mph



Target 40a: *to reduce journey times between key locations within the north east between 2008 and 2021*

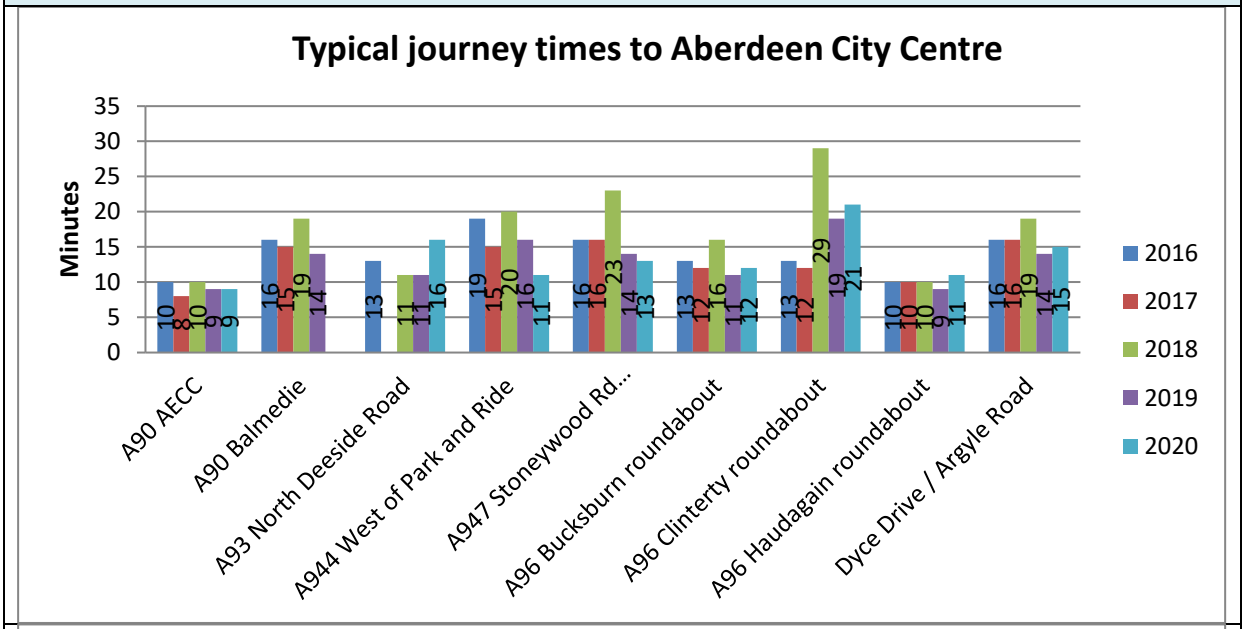
Target 40b: To reduce the differential between public transport and car journey times between key locations within the north east, by ensuring that average speeds for public transport journeys are less than 20% higher than comparable car journeys by 2021.

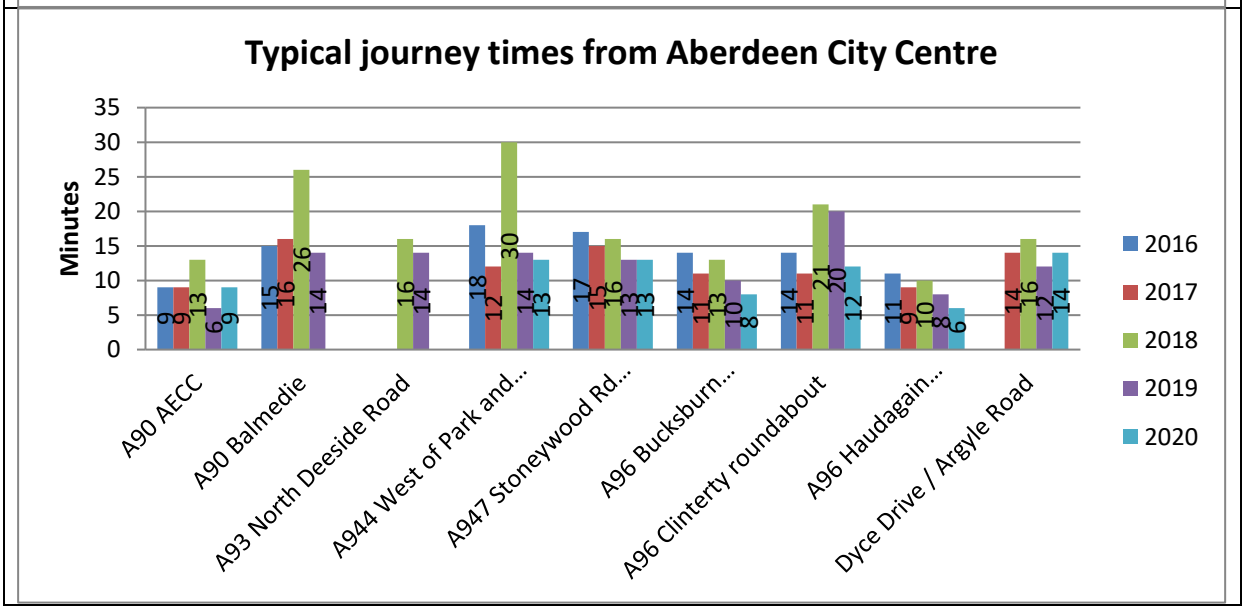
Source: www.transportdirect.info / www.google.co.uk/maps / www.travelinescotland.com

Decreasing car journey times and increasing public transport times since the baseline year of 2008 indicate that it is highly unlikely that the 2021 target will be achieved.

Since 2016, the Traffic Scotland website has also monitored typical journey times on the road network within Aberdeen City. The tables indicate journey times in 2020 are shorter than 2015 on ten routes, longer on three routes and the same length on two routes, thus supporting the car journey times information in Indicator 40. There are only small differences between cumulative journey times in each given year with the exception of 2018, which, as is the case with indicator 40, shows an increase in journey time across numerous locations.

Indicator 41: Typical journey times by road to and from Aberdeen City Centre





Source: Traffic Scotland

14. Road Safety

Casualties

The number of casualties in road traffic accidents across the north east has fallen from an average of 1,263 in the period 2001 to 2005 to 657 between 2014 and 2018, a reduction of some 48%.

Indicator 42: The number of casualties in road traffic collisions

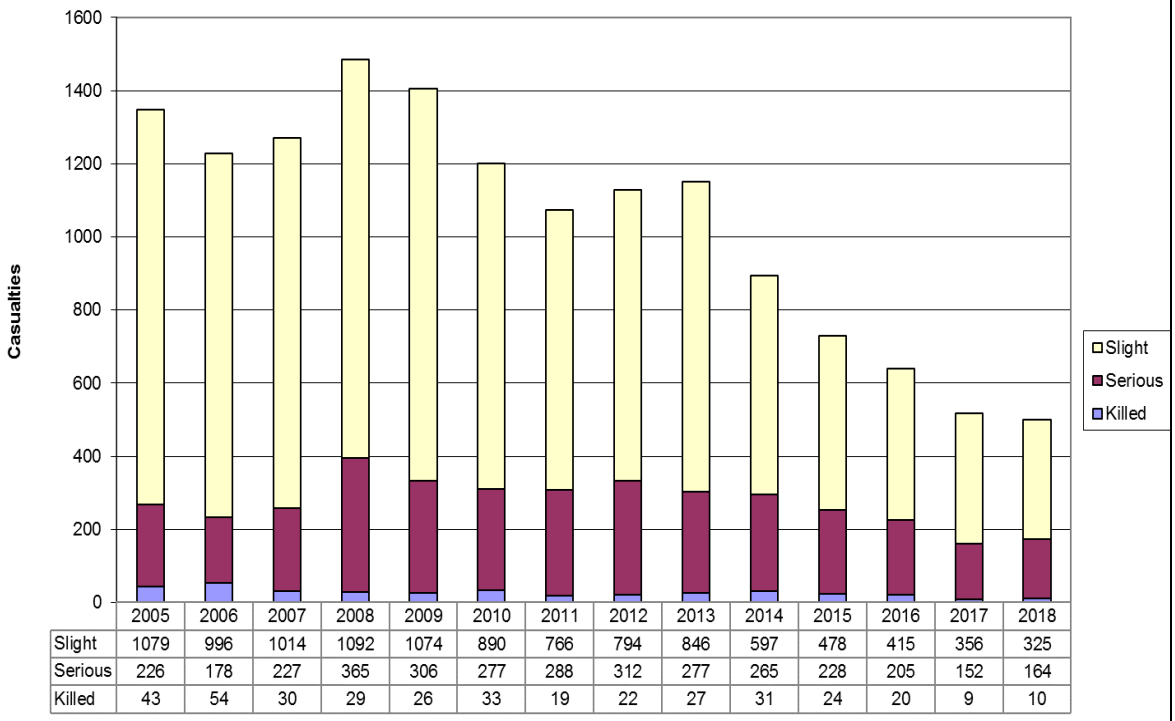
2001-05 average: Baseline

	Fatal	Serious	Slight	All
Aberdeen	6	71	402	479
Aberdeenshire	31	148	607	784
North east	38	219	1,010	1,263

(All severities - reduction of 24.6% on 1994-98 average)

2014-2018 average

	Fatal	Serious	Slight	All
Aberdeen	4	61	161	226
Aberdeenshire	15	143	273	431
North east	19	204	434	657
% Change since 2001-05	-50%	-7%	-57%	-48%



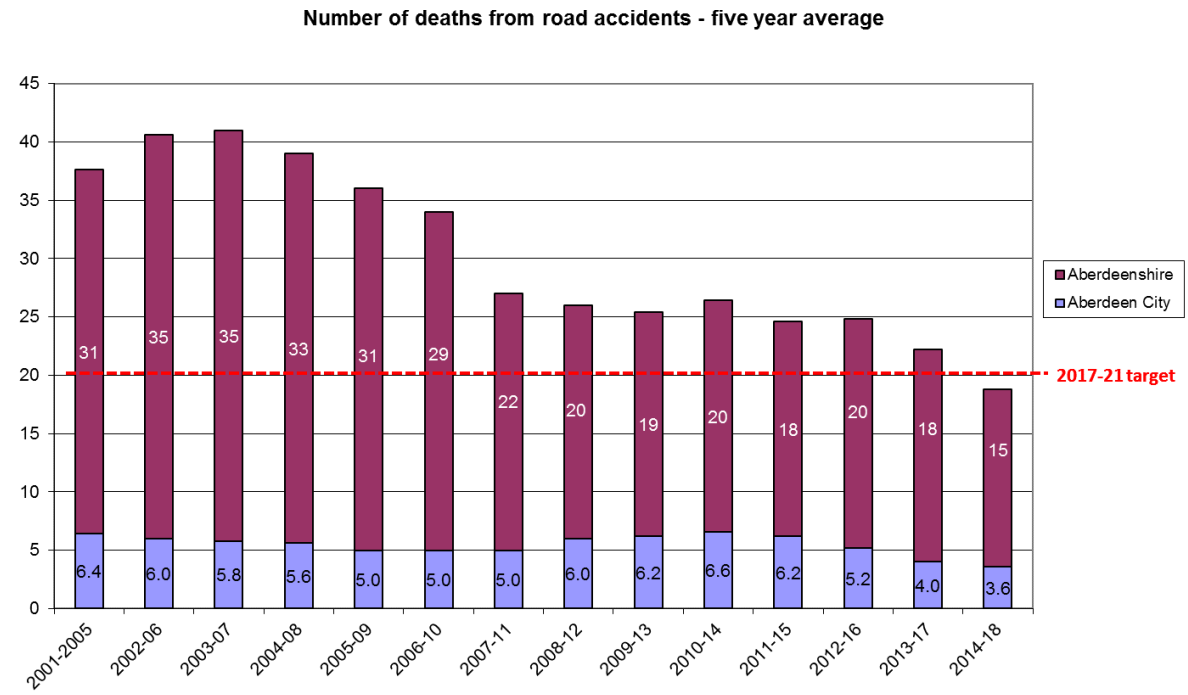
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Slight	1079	996	1014	1092	1074	890	766	794	846	597	478	415	356	325
Serious	226	178	227	365	306	277	288	312	277	265	228	205	152	164
Killed	43	54	30	29	26	33	19	22	27	31	24	20	9	10

Target 42: To reduce the number of casualties in road traffic collisions by at least 2% per five-year average to less than 1,000 of all severities by 2017-21.

Source: Road Casualties Scotland, 2019

This report also monitors fatalities in Road Traffic Collisions and these are shown in Indicator 43. There has been a halving (a 50% reduction) from the 2001-05 base to an average of 19 deaths per year between 2014-18.

Indicator 43: The number of deaths in road traffic collisions



% change on 2001-05 baseline	Aberdeen City: -44%	Aberdeenshire: -51%	North East: -50%

Target 43: To reduce deaths from road traffic collisions by at least 50% of 2001-05 average to an average of fewer than 20 per year by 2017-21.

15. Environment

Carbon Emissions

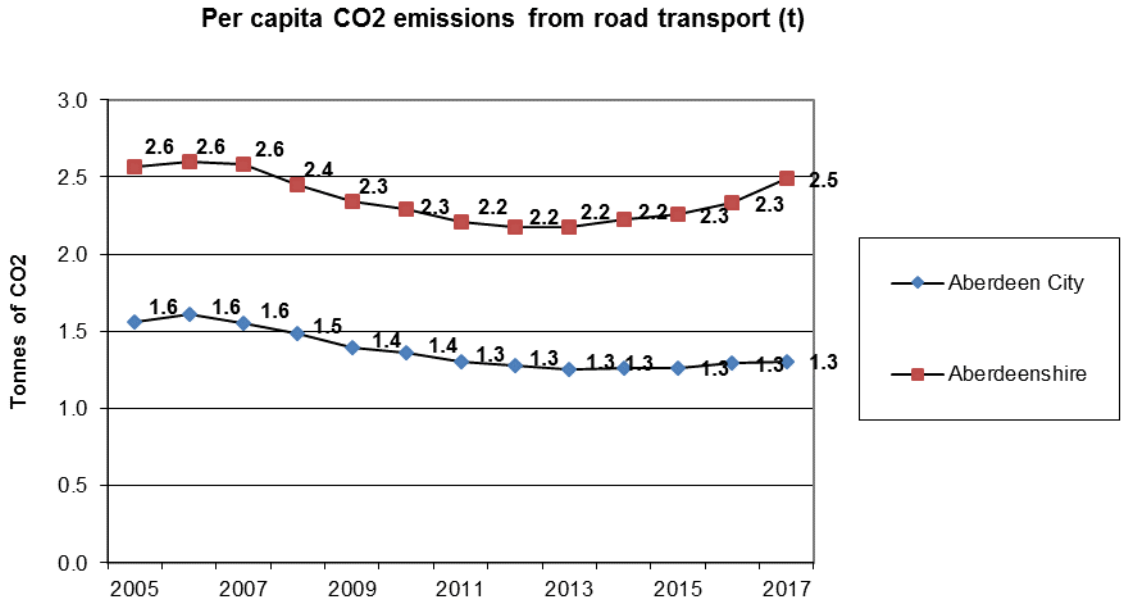
Per capita CO2 emissions from road transport

The UK Government provides data supporting the national indicator of per capita CO2 emissions in Local Authority areas across the UK split by energy sector.

In 2017, transport (including road and diesel railways) accounted for 26% of total carbon dioxide emissions from industry and commercial; domestic; and transport sources in Aberdeen City and 44% in Aberdeenshire. This proportion has increased by 7 percentage points since 2005 in Aberdeen City and by 16 percentage points in Aberdeenshire. It should be noted that the figures are revised in each version of the statistics, which changes the attribution of CO2 to transport.

As well as total carbon emissions, it is appropriate to monitor carbon emissions on a per capita basis to take account of changes in the population. Per capita emissions from road transport have decreased from 2.6 tonnes of CO2 per person in 2005 to 2.5 tonnes in 2017 in Aberdeenshire (up from a low of 2.2 tonnes) and from 1.6 to 1.3 tonnes in Aberdeen City. This represents an 8% reduction across the region since 2005. Per capita emissions from road transport for Scotland as a whole were 2 tonnes of CO2 in 2017.

Indicator 44: Carbon Dioxide emissions from road transport



% per capita reduction since 2005	Aberdeen City -16%	Aberdeenshire -3%	North East -8%

Target 44: *To reduce the CO2 emissions from road transport in the north east by at least 2.5% per year, to an average of less than 1.5 tonnes per capita by 2021.*

Source: Department of Energy and Climate Change

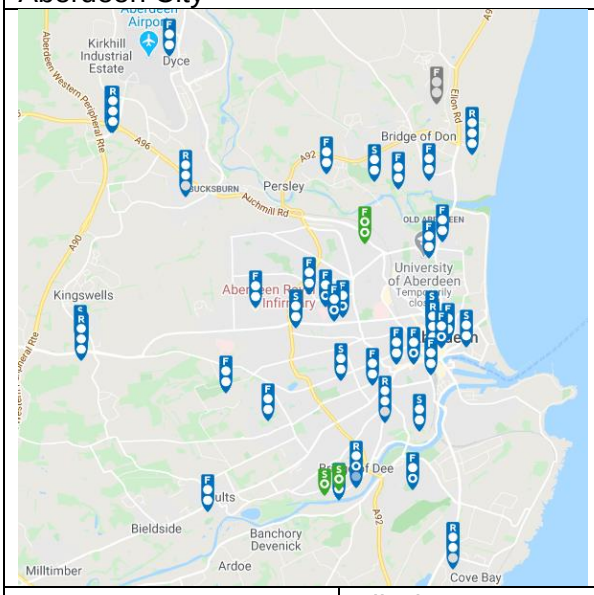
Electric Vehicles

The north east has had a number of publicly available chargers installed in order to encourage the use of electric vehicles. As of 2020, this equates to some 105 facilities, 8% of the total number of chargers available in Scotland, up significantly from 2017 when there were 52. Work is currently underway to install more rapid and fast chargers in order to allow users to charge their vehicles more quickly. The maps below show a snapshot of where there are chargers.

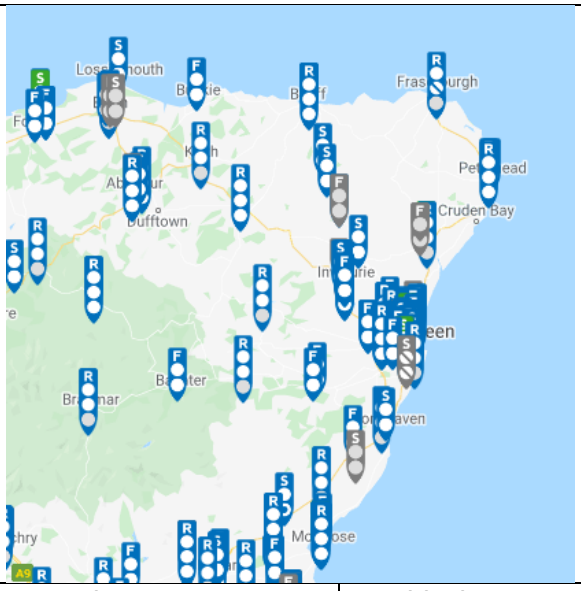
Indicator 45a: The number of publicly available Electric Vehicle charging points across the north east

Number of Chargers (2020)

Aberdeen City



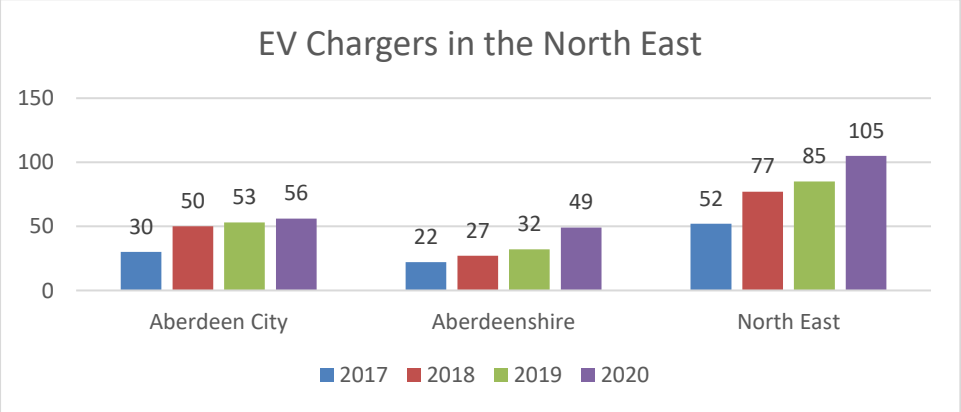
Aberdeenshire



2020	All Chargers	Fast Chargers	Rapid Chargers
Aberdeen City	56	26	11
Aberdeenshire	49	22	14
North East	105	48	25
Scotland	1,338	517	304
North East as a % of Scotland	8%	9%	8%

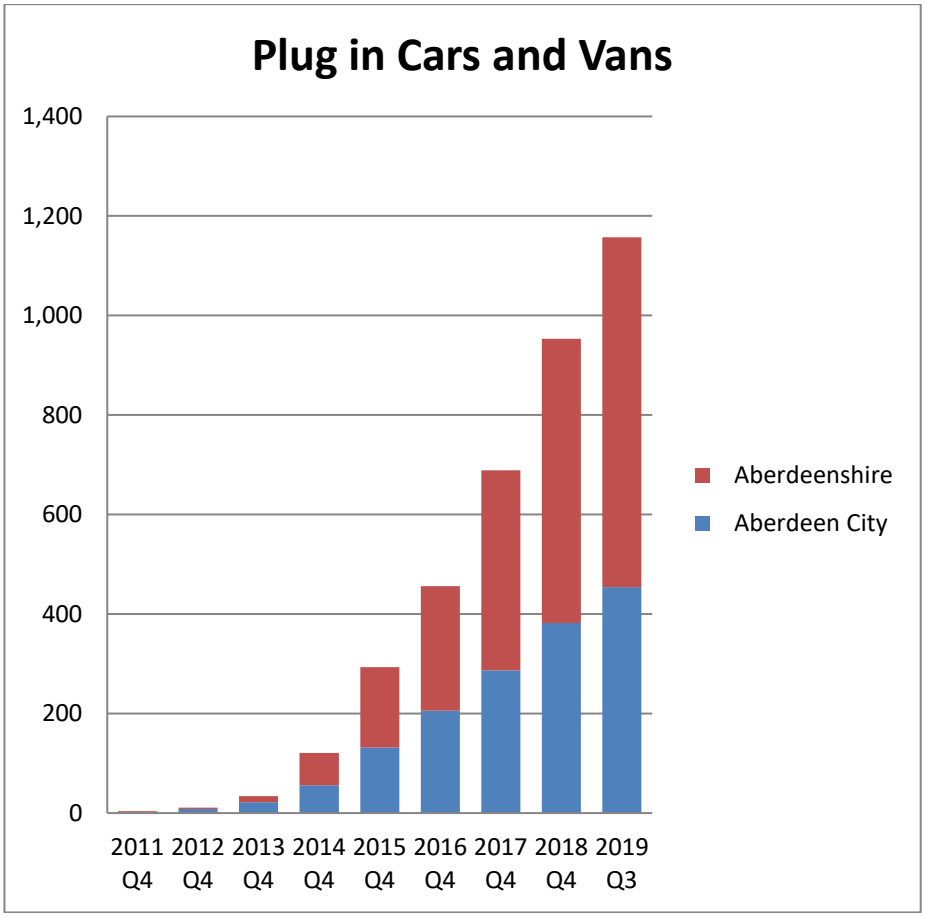
Target 45a: To double from a 2017 base of 52, the number of public EV points available in the north east to at least 100 by 2021.

Source: http://chargeplacescotland.org/



Source: http://chargeplacescotland.org/

In addition to the number of charging points increasing across Aberdeen and Aberdeenshire, the number of plug-in electric vehicles has also seen significant growth year-on-year. As of Q3 in 2019, there were 454 plug-in cars registered in Aberdeen and 703 in Aberdeenshire, a total of some 1,157 across the north east (an increase of 21% on the previous year's total and representing over 8% of such vehicles in Scotland). The graph below illustrates this trend for both Aberdeen City and Aberdeenshire.



Source: Department for Transport Vehicle Statistics

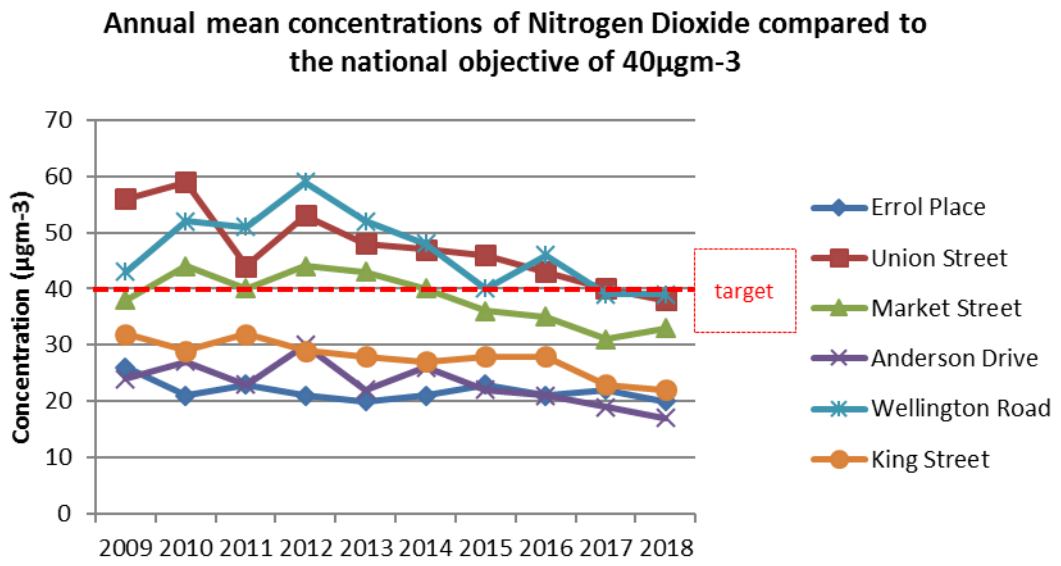
Indicator 45b: The number of plug-in electric cars and vans across the north east			
	Aberdeen City	Aberdeenshire	North East
2016	206	250	456
2017	287	402	689
2018	382	571	953
2019	454	703	1,157
Target 45b: To double from a 2016 base of 456, the number of plug-in electric cars and vans registered in the north east to at least 1,000 by 2021.			

Air Quality

Three Air Quality Management Areas have been identified in Aberdeen: the City Centre; Anderson Drive; and Wellington Road. These areas have been identified for projected exceedances in permitted levels of both Nitrogen Dioxide (NO2) and Particulates (PM10) and the City Council has produced a plan of action for reducing emissions to within European-defined maximum levels in these areas.

Monitoring stations are in place at six locations and provide data on the current situation as well as annual average concentrations of pollutants. Indicator 46 shows that, as of 2018, all monitoring sites are within the annual mean objective, with Union Street dropping below 40µgm-3 for the first time. Market Street was the only site to see a small increase in NO_2 levels.

Indicator 46: The average atmospheric concentration of nitrogen dioxide

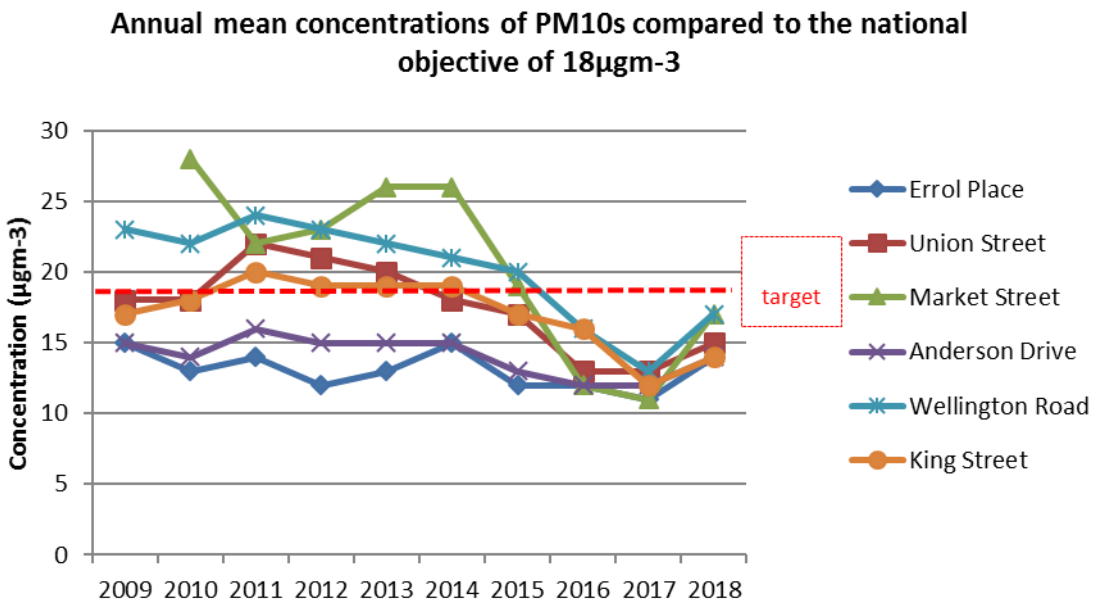


Target 46: To reduce the levels of identified pollutants and meet national and European legislation on pollutants (enabling the removal of AQMA status at all sites in the north east - in Aberdeen City Centre, Wellington Road and Anderson Drive)

Source: www.scottishairquality.co.uk and Aberdeen City Council 2019 Air Quality Annual Progress Report

Between 2017 and 2018, the annual mean objective for particulates increased across the board, but all sites remain within target and all are reduced on Baseline.

Indicator 47: The average atmospheric concentration of particulates (PM10s)



Target 47: To reduce the levels of identified pollutants and meet national and European legislation on pollutants (across the three AQMAs in Aberdeen).

Source: www.scottishairquality.co.uk and Aberdeen City Council 2019 Air Quality Annual Progress Report

Indicator 48: The number of Noise Management Areas

In March 2015, Aberdeen City Council declared 15 Noise Management Areas across the City:

1. Auchmill Road at Newton Terrace
2. North Anderson Drive at Clifton Road
3. Great Northern Road near Smithfield Lane
4. King Street at Don Street
5. North Anderson Drive at Mastrick Road
6. North Anderson Drive at Laburnum Walk
7. King Street at Mealmarket Street – excluding Little John Street and Mealmarket Street
8. King Street at St Clair Street
9. Union Street at Dee Street
10. Rennies Wynd, Wapping Street, Carmelite Street, Trinity Street, Guild Street
11. Market Street, Union Street, Netherkirkgate
12. Market Street, Virginia Street, Shore Brae
13. Palmerston Road, Market Street
14. Victoria Road at Walker Road
15. A90 at Holburn Street.

There are no declared NMAs in Aberdeenshire.

Target 48: To reduce the number of Noise Management Areas.

Source: Aberdeen City Council website.

NL/RD 18 May 2020