



# nestrans | 2040

## **Regional Transport Strategy:**

MONITORING REPORT

**February 2023**

nestrans

# Introduction

Nestrans Regional Transport Strategy, Nestrans2040, was approved by the Minister for Transport in November 2021 and adopted by the Nestrans Board as its position of strategic transport policy for the next twenty years.

The Nestrans Board agreed that a Monitoring framework be introduced, which will set baselines for key indicators and targets (to both 2030 and 2040), which will be reported annually to the Board so that policies can be tracked and if necessary, adjusted towards achieving the targets. This 2023 Monitoring Report represents the first Annual Report.

## Six high level priorities

The RTS contains six high level priorities which indicate the “direction of travel” for strategic transport policy. These reflect the principles and key factors for change which the strategy will seek to influence.

The six priorities are interlinked and are not in any order:

- Connectivity;
- Road Casualty Reduction;
- Reducing harmful emissions;
- Moving towards Net Zero Carbon;
- Accessibility; and
- Modal Shift.



## Outcomes

Under each of the priorities, one or more key indicators have been identified, where regular monitoring will provide an indication of whether the actions contained in the strategy and being developed by Nestrans and partners are having the desired impact in influencing trends. This report indicates measurable indicators, identifies the baseline of data available in 2022 and shows the targets agreed by Nestrans Board at its meeting in February 2002, to both 2030 and for the lifetime of the strategy to 2040.

A total of twenty Targets were agreed, each with a baseline. These are intended to be aspirational and far-reaching and as such, may not all be achieved. However, they set the intent of Nestrans and its partners and will enable actions to be identified which match that ambition. It should however be cautioned that there are external factors such as global economic performance, energy prices and public health impacts along with hundreds of other factors beyond the control of local partners. These will have an influence on outcomes - often a greater influence than the actions of the partners, but due to their unpredictability are regarded as risks, rather than something that it is possible to plan for.

## Identifying targets

As mentioned above, a total of twenty targets were identified and agreed. The targets should provide decision-makers with the information necessary to determine whether policies and interventions are succeeding in influencing the following:

<b>Connectivity:</b>	Improving Rail journey times Car travel times Bus travel times HGV journey times
<b>Casualty Reduction:</b>	Fatalities in Road Traffic Collisions All severities of injuries Reducing the numbers of Pedestrians killed or seriously injured Reducing the numbers of cyclists killed or seriously injured
<b>Emissions:</b>	Reducing concentrations of Nitrogen Dioxide Reducing concentrations of Particulate Matter (PM10) Reducing concentrations of Particulate Matter (PM2.5)
<b>Carbon:</b>	Moving towards Net Zero carbon emissions from surface transport
<b>Accessibility:</b>	Proximity of a station to where people live Accessibility of railway stations Satisfaction of bus users with Value for Money Satisfaction of bus users with convenience and accessibility of services
<b>Mode Split:</b>	Reducing overall demand for travel Influencing proportions of travel choice by mode Lessening dependence on car travel Reducing the amount of car travel across the region.

# 1 Improved journey times to enhance connectivity

## 1a Journey times by rail

**Aim:** To see improved rail journey times between Aberdeen and key centres by 2040.

**Baseline:** Average rail times in 2019 - 2 hours 30 minutes to Edinburgh; 2 hours 37 minutes to Glasgow; and 2 hours 16 minutes to Inverness.

**Target:** Improved journey times by rail from Aberdeen, to 2 hours 10 mins to Edinburgh; 2 hours 20 mins to Glasgow and 2 hours to Inverness by 2040.

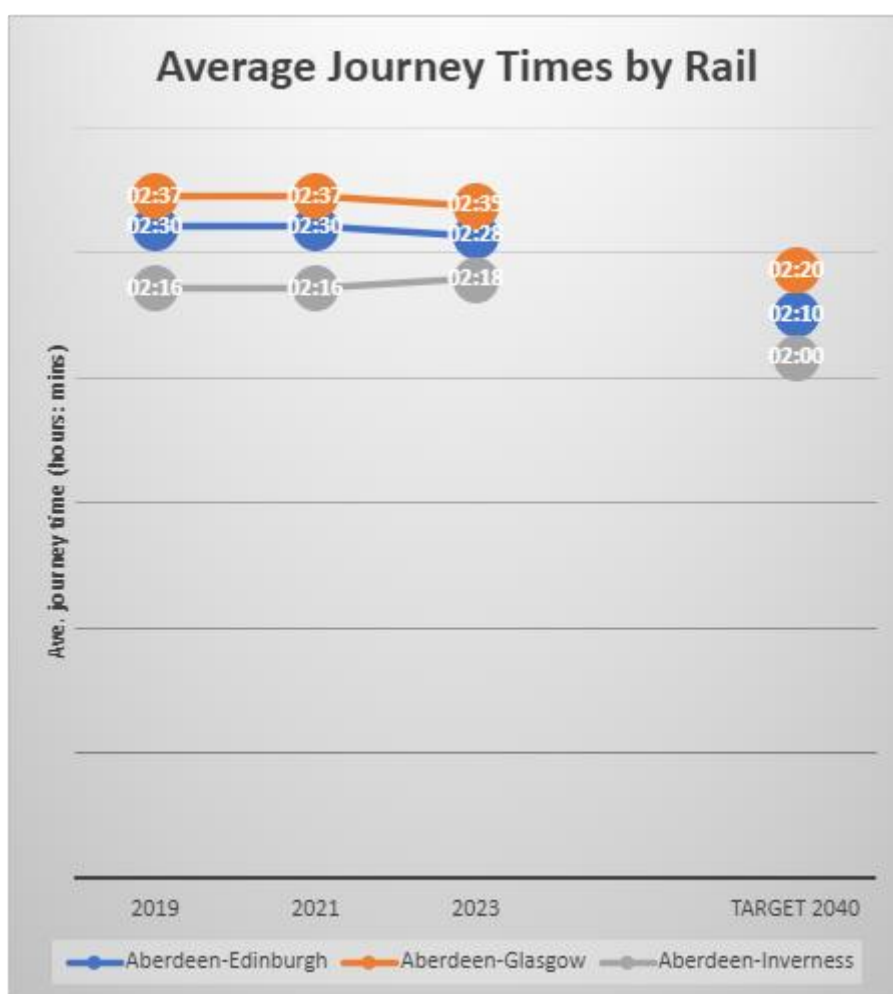


Figure 1a: Average journey times by rail, Aberdeen to key destinations, 2019-2023 and target.

Source: ScotRail timetables

Average journey times by rail are a key determining factor in choice of travelling by train and are often currently perceived as being no quicker than driving to Scotland's major cities. Although it is recognised that connectivity is also affected by other factors, such as frequencies, journey times has been identified as the primary indicator.

Aberdeen & Grampian Chamber of Commerce have indicated that “a 60 miles per hour railway” serving the Central Belt is necessary to make the north east attractive as a business destination and make rail an attractive option for travel to and from the area. Distances to Edinburgh and Glasgow are around 128 miles and 146 miles respectively. Therefore, target journey times would be in the order of 2 hours 8 mins and 2 hours 26 mins, averaging 60 miles per hour for the journeys.

The Scottish Government has committed £200 million in association with the Aberdeen City Region Deal to upgrade the East Coast Main Line to improve resilience, offer additional capacity and enable journey time reductions of 20 minutes between Aberdeen and the Central Belt. Electrification, or other decarbonisation of the railways and rolling stock, may offer improved performance and further journey time reductions may be possible.

**2023 Update:** There are small variations in average journey times to key centres, but no significant changes since the baseline was set.

## 1b i) Average car journey times for travel across the north east

**Aim:** To maintain average car journey times for 12 sample journeys across the north east through to 2040.

**Baseline:** 12 sample journeys, covering a total of 366 miles, were estimated to take a total of 9 hours 6 minutes in 2021.

**Target:** To maintain average car journey times for sample journeys through to 2040.

Indicator 1b	2022	
	Car	Public Transport
Fraserburgh to St Cyrus	01:32	02:51
Peterhead to Banchory	01:05	02:50
Banff to Foresterhill	01:08	01:50
Turriff to RGU	00:58	02:26
Bridge of Don, Ellon Road @ N Donside to Dyce	00:12	00:50
Stonehaven to Airport	00:28	01:23
Braemar to Woodhill House	01:21	02:30
Huntly to Union Street, St Nicholas Kirk	00:57	01:03
Seaton to Altens	00:15	00:42
Portlethen to Kirkhill	00:22	01:21
Tillydrone to East Tullos	00:17	00:43
Cults to Menie House (AB23 8YE)	00:30	01:20
Total journey time	09:05	19:49
Average journey speed	40.3	18.5
	AA Route Planner	Traveline Scotland

\*shortest journey time starting between 0800 and 0930, weekday

Source: AA Route Planner and Traveline Scotland

Since 2008, Nestrans has monitored 12 sample journeys across the north east by using the AA Route Planner tool. The journeys cover a wide range of potential trips including linking rural areas with Aberdeen, some cross-City trips and common journeys such as Stonehaven to the airport or commuter villages to industrial estates.

In 2008, 2009 and 2010 these journeys were estimated to take a total of around 14 hours. However, this has reduced significantly since and in 2022, are estimated to total just over 9 hours, as indicated in Figure 1b below. Some of this change may be attributed to changes in the Route Planner's parameters, but upgrades to the road network including Inveramsay Bridge, opening of the Diamond Bridge, Aberdeen Western Peripheral Route and Balmedie-Tipperty dualling will undoubtedly have had an impact too.

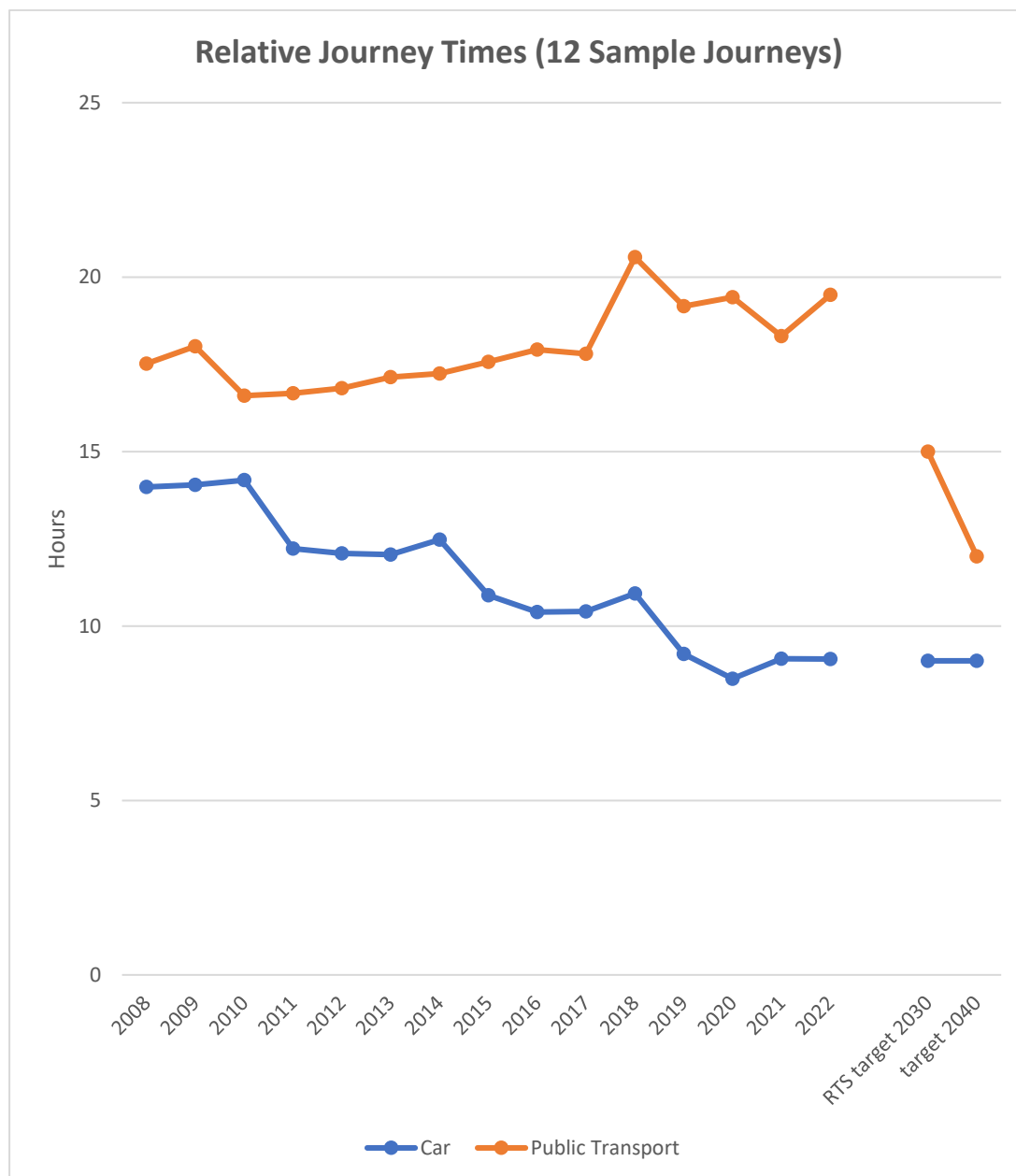
**2023 Update:** There are small variations in average journey times, but no significant changes since the baseline was set.

## 1b ii) Average Journey times for public transport across the north east

**Aim:** To improve average journey times for public transport journeys across the north east through to 2040.

**Baseline:** 12 sample journeys, covering 366 miles, were estimated to take a total of 18 hours 31 minutes in 2021, at an average speed of 19.8mph.

**Target:** Improved journey times by public transport, towards average running speeds of 25mph by 2030 and 30 mph by 2040.



**Figure 1b: Total journey times by car and public transport for 12 sample journeys, 2008 to 2022.**

Source: AA Route Planner and Traveline Scotland

Since 2008, Nestrans has used the Traveline Scotland website to ascertain the journey time for 12 sample public transport journeys in the north east. The journeys are the same as those used for

Indicator 1bi above and seek to use a departure time between 8am and 9:30am where available. They provide journey times from the time of departure, but will include wait time where a change of public transport or connection is required.

Whilst average journey times by car have reduced by 35% since 2008, public transport journey times have increased by an average of 13% (journey time changes vary from 26% reduction, to an increase of 48%). The relative journey times shown by a ratio of public transport against car have seen an increase from 1.25 to over 2 (i.e. in 2022, public transport journey times averaged twice as long as comparable car journey times).

Making public transport attractive and a viable alternative for many journeys will depend upon competitive journey times and the Regional Transport Strategy contains many policies and interventions aimed at reducing this discrepancy and aiming to narrow the gap between public transport and car journey times. For these 12 sample journeys, average running speeds for public transport of around 25mph and 30 mph respectively would provide a total journey time of 15 hours by 2030 and 12 hours by 2040.

**2023 Update:** Since the baseline was set, average car journey times have not changed significantly, however public transport times are becoming less competitive – an average increase of 6.6% between 2021 and 2022.



## 1c Effective journey time for goods vehicles

**Aim:** To reduce the typical time taken by an HGV to access the national motorway network at Friarton Bridge in Perth from Peterhead Port to less than 2 and a half hours by 2040.

**Baseline:** Estimated average time for an HGV journey from Peterhead Port to Friarton Bridge, Perth of 2 hours 43 minutes in 2021 (an average of 45 mph).

**Target:** Improved journey times for goods vehicles, towards average running speeds of 47mph by 2030 and 49 mph by 2040, enabling an HGV to travel between Peterhead and Friarton Bridge in less than 2 hours 36 minutes in 2030 and less than 2 hours 30 minutes in 2040.

Peterhead to national motorway network at Friarton Bridge, Perth (122 miles)			
Estimate of HGV journey time			
		Time	Ave Speed
2021		02:43	44.91 mph
2022		02:41	45.47 mph
2030	Target	02:36	46.92 mph
2040	Target	02:30	48.80 mph

**Figure 1c: Sample HGV journey time**

The nearest connection from the Nestrans region to the national motorway network is at Friarton Bridge near Perth, some 86 miles from Aberdeen and 122 miles south from Peterhead Port. Business and industry requires reliable and consistent journey times for accessing major markets and an indicator has been devised to give an indication of the region's accessibility of calculating average journey times between Peterhead and the bridge – it is estimated that an HGV can currently make the journey in around 2 hours 41 minutes, an average speed of 45 mph. Improving average speeds to 47mph by 2030 would mean a journey time of 2 hours 36 minutes; an average speed of 49 mph by 2040 would be a journey time of 2 hours 30 minutes.

**2023 Update:** There has been a small reduction in the journey time for an HGV to access the motorway network, enabling a marginal improvement in average journey speed since the baseline was established.

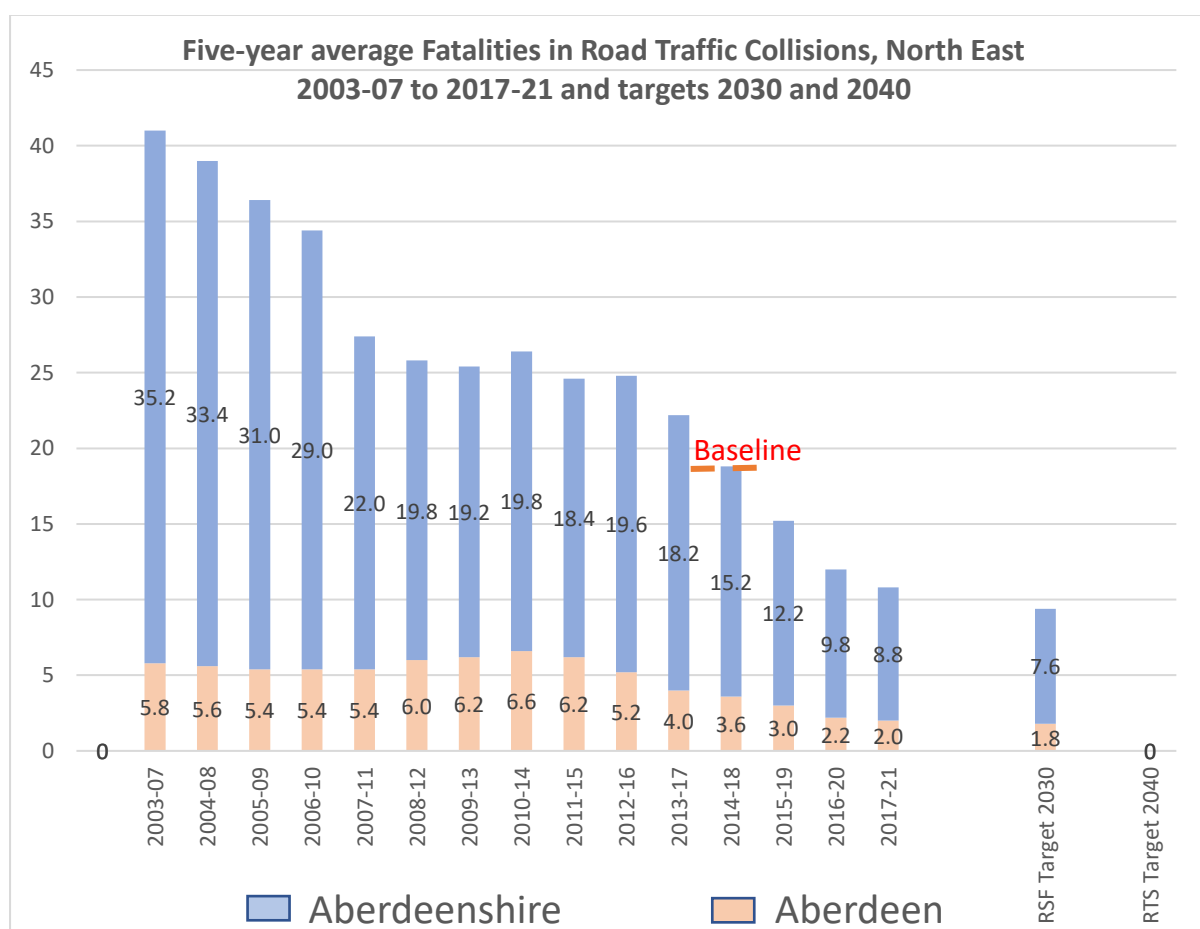
## 2 Casualty Reduction

### 2a Zero Fatalities on the Road Network

**Aim:** To reduce the number of fatalities, towards zero deaths by 2040.

**Baseline:** Between 2014 and 2018, there was an average of 18.8 deaths per year as a result of Road Traffic Collisions.

**Target:** To reduce the number of fatalities in Road Traffic Collisions in the north east to zero by 2040 (interim target of fewer than 9.4 deaths by 2030).



**Figure 2a: Average number of Fatalities, 2003/07 to 2017/21 and targets**

Source: Reported Road Casualties Scotland and ACC/Aberdeenshire Council Road Safety Plans

One of the key aims of the RTS is to reduce casualties in Road Traffic Collisions. Nestrans is part of the North East Road Casualty Reduction Partnership and works with Police Scotland, local authorities and others to collectively work towards reducing the numbers of casualties. The national Road Safety Framework has a long-term goal of no fatalities by 2050 and interim targets, including halving the number of road deaths by 2030, based on a 2014-18 baseline.

Casualty numbers have been reducing in recent years and Figure 2a shows progress towards an aim of zero fatalities in the period of the strategy. This strategy aims to build on this progress and out-perform the national targets.

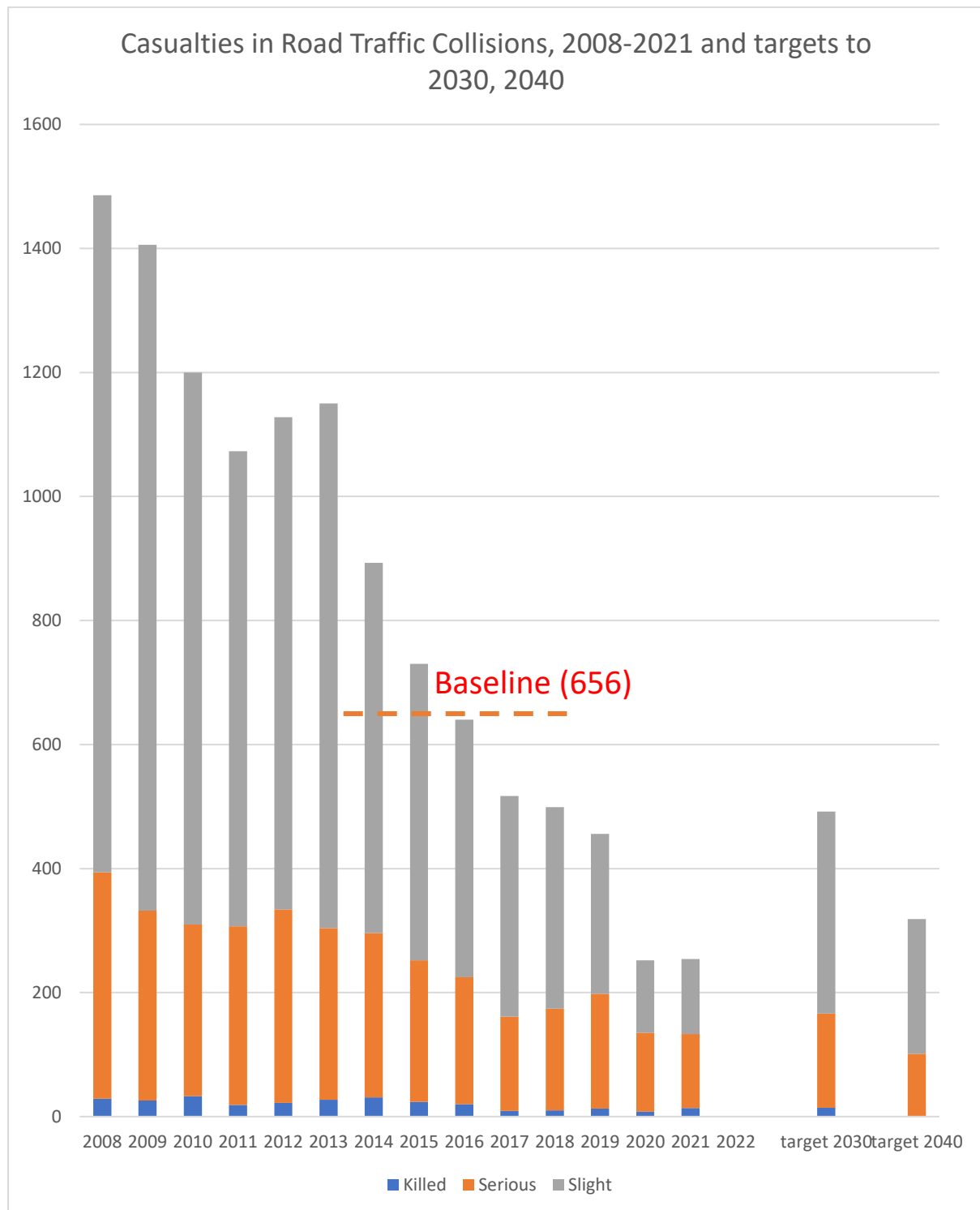
**2023 Update:** Although 2021 saw an increase in the number of fatalities in road traffic collisions, the highest number since 2016, the five-year average is still downward with 2017-21 average rate some 43% lower than the baseline of 2014-18.

## 2b A reduced number of casualties

**Aim:** To reduce the number of casualties in Road Traffic Collisions in the north east by 50% by 2040 (interim aim of 25% reduction by 2030).

**Baseline:** Between 2014 and 2018, there was an average of 656 injuries per year as a result of Road Traffic Collisions.

**Target:** To reduce the number of casualties in Road Traffic Collisions in the north east to fewer than 328 by 2040 (interim target fewer than 492 by 2030).



**Figure 2b: Casualties in Road Traffic Collisions, 2008 to 2021 and targets.**

Source: Reported Road Casualties Scotland and ACC/Ab'shire Council Road Safety Plans

In line with reducing the number of deaths, it is also important to ensure that other categories of casualty are also reducing. This report monitors casualties by category (killed, serious and slight) and overall numbers have been reducing since 2008. It should be noted that casualties in 2020, in line with much reduced traffic volumes were significantly lower than in average years and it is noted that this reduced figure has almost been retained in 2021. The baseline and targets are based on a five-year average 2014 to 2018 (in line with Scotland's Road Safety Framework) and therefore do not reflect the lower numbers during the pandemic.

Casualties in the north east of all severities, have reduced from around 9% of the total number across Scotland in 2010 to 5.7% in 2019, 5.0% in 2020, and remained at 5.0% in 2021.

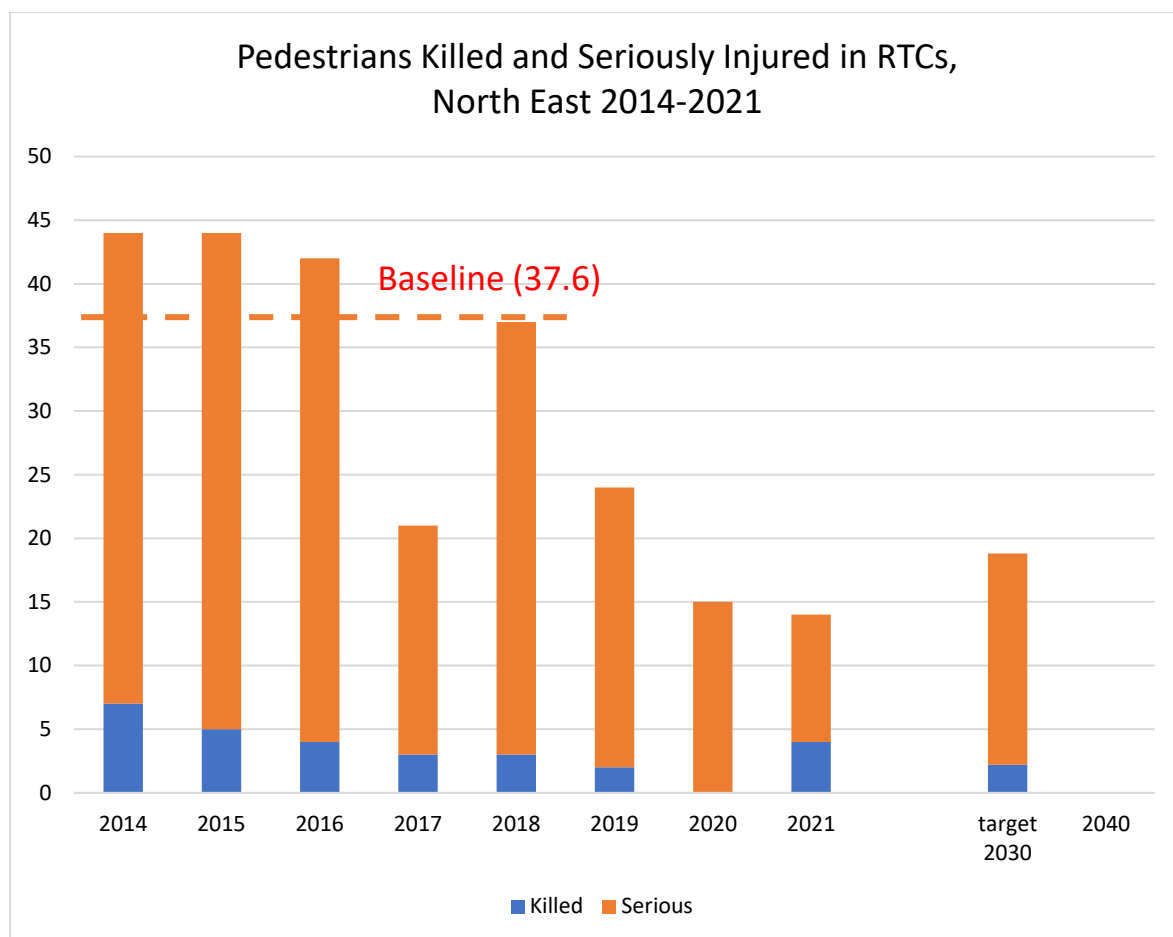
**2023 Update:** Casualty numbers reduced significantly in 2020, partly as a result of reduced traffic during the pandemic. However, it is heartening to note that these lower rates have been maintained into 2021, a reduction of 61% on the number of casualties of all severities from 2014-18 baseline to 2021.

**2c (i) Zero Pedestrians Killed or Seriously Injured in Road Traffic Collisions**

**Aim:** To reduce the number of fatalities and serious injuries to pedestrians, towards zero by 2040 (50% reduction by 2030).

**Baseline:** Between 2014 and 2018, there was an average of 4.4 deaths and 33.2 serious injuries per year to pedestrians in the north east.

**Target:** To reduce the number of fatalities and serious injuries to pedestrians in Road Traffic Collisions in the north east to zero by 2040 (interim target of fewer than 19 deaths and serious injuries by 2030).



**Figure 2c (i): Pedestrian Casualties Killed and Seriously Injured, 2014 to 2021 and targets.**

Source: Road Casualty Statistics Scotland, October 2022.

Pedestrian safety is a key priority for the RTS and also for Road Safety North East Scotland (RSNES), the Road Casualty Reduction Partnership.

Pedestrian casualty numbers have been reducing in recent years and Figure 2c (i) shows progress towards an aim of zero deaths and serious injuries in the period of the strategy. Although the national Road Safety Framework indicates a target of a reduction of 40% in the numbers of pedestrians killed and seriously injured by 2030, based on 2014-18 averages, this strategy seeks to reduce those numbers further - by half by 2030 and to zero by 2040.

**2023 Update:** Pedestrian casualty numbers reduced significantly in 2020, partly as a result of reduced traffic and a succession of lockdowns during the pandemic. However, it is heartening to note that these lower rates have been maintained into 2021, a reduction of 63% on the number of pedestrian casualties killed or seriously injured from 2014-18 baseline to 2021.

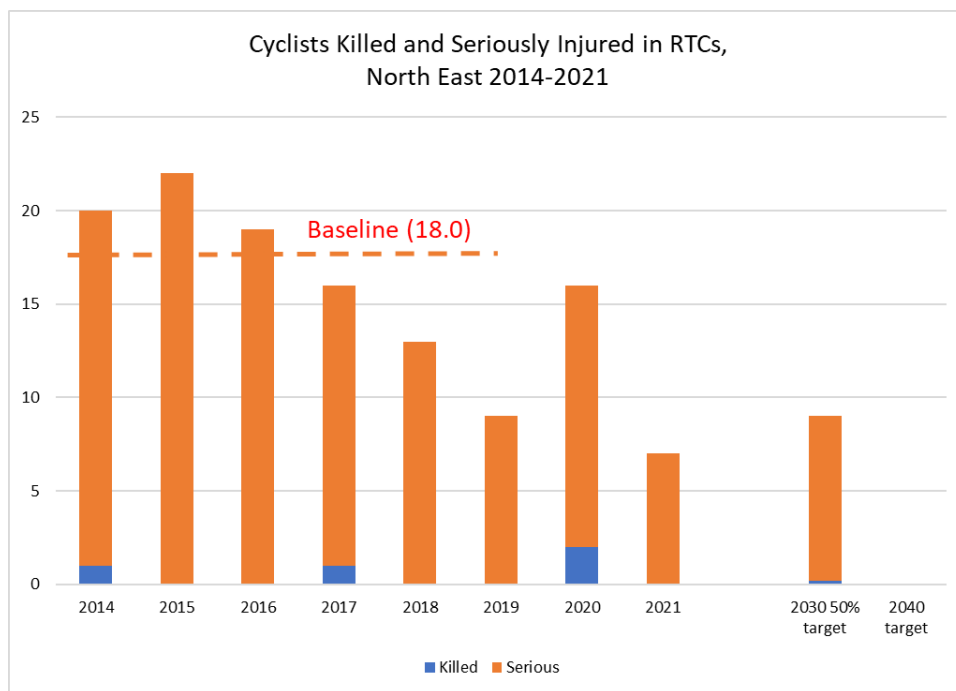


## 2c (ii) Zero Cyclists Killed or Seriously Injured in Road Traffic Collisions

**Aim:** To reduce the number of fatalities and serious injuries to cyclists, towards zero by 2040 (50% reduction by 2030).

**Baseline:** Between 2014 and 2018, there was an average of 0.4 deaths and 17.6 serious injuries per year to cyclists in the north east.

**Target:** To reduce the number of fatalities and serious injuries to cyclists in Road Traffic Collisions in the north east to zero by 2040 (interim target of fewer than nine deaths and serious injuries by 2030).



**Figure 2c (ii): Cyclist casualties killed and seriously injured, 2014 to 2021 and targets.**

Source: Road Casualty Statistics Scotland, 2021.

A perception that cycling is unsafe is one of the major factors in people being reluctant to cycle, even for short trips. To encourage more cycling and to enable growth in cycling, there is a need to reduce the number and severity of collisions involving injuries.

As part of Road Safety North East Scotland (RSNES), the Road Casualty Reduction Partnership, a key focus will be to work towards reducing the numbers of cyclist casualties. Cycling casualty numbers have been generally reducing in recent years and Figure 2c (ii) shows some progress towards an aim of zero deaths and serious injuries in the period of the strategy. Although the national Road Safety Framework indicates a target of a reduction of 20% in the numbers of cyclists killed and seriously injured by 2030, based on 2014-18 averages, Nestrans' Regional Transport Strategy seeks to reduce those numbers further - by half by 2030 and to zero by 2040.

**2023 Update:** Cycling casualty numbers increased in 2020 compared to 2018 and 2019, possibly as a result of increased numbers cycling during the pandemic, but returned to lower levels in 2021 with zero fatalities and seven serious injuries – the lowest recorded number of cycling casualties in a single

year in the north east. Cyclists killed or seriously injured in the north east is 61% down from 2014-18 baseline to 2021.

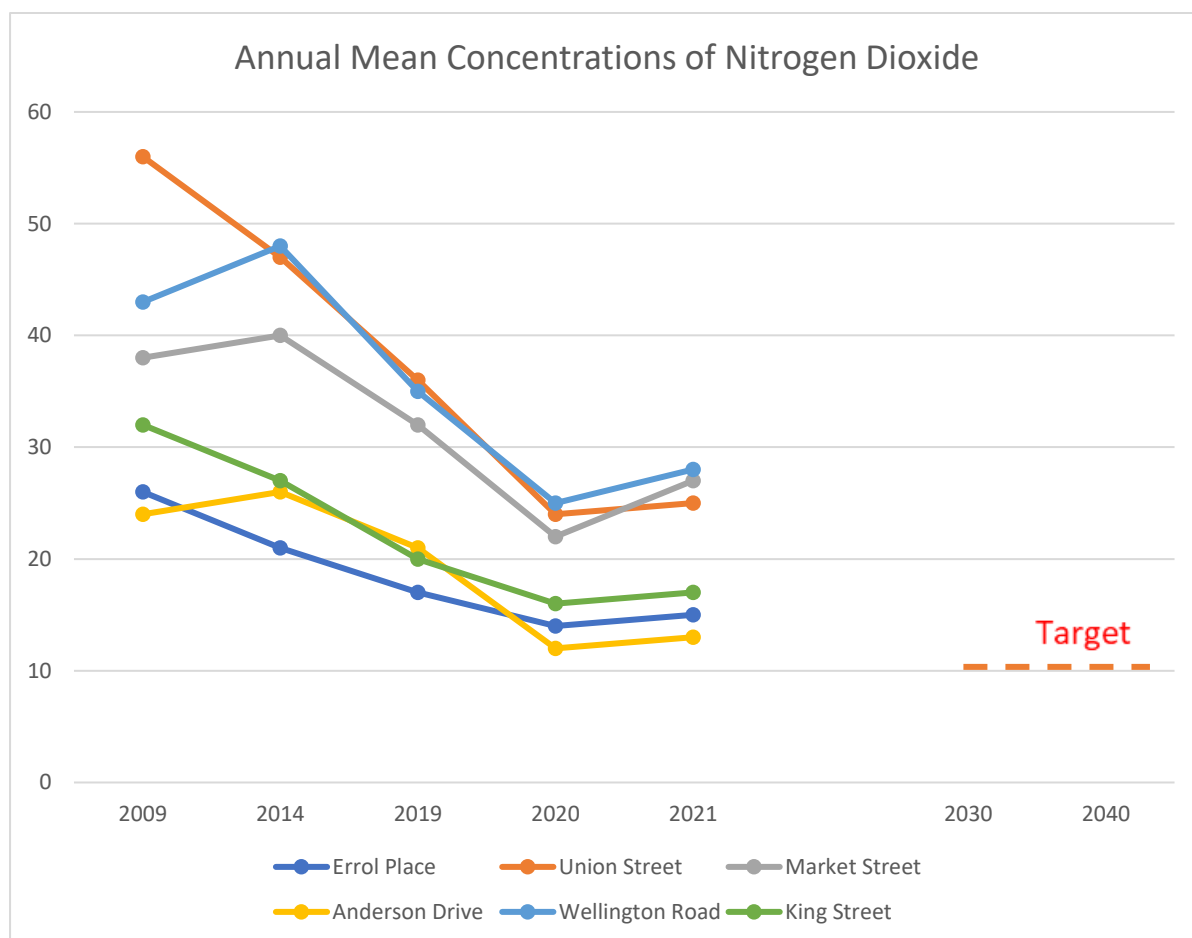
### 3 Air Quality

#### 3a Nitrogen Dioxide (NO2)

**Aim:** To reduce emissions of Nitrogen Dioxide, such that World Health Organisation (WHO) and Clean Air for Scotland (CAfS) standards are met and no Air Quality Management Area designations are required.

**Baseline:** At six Monitoring Stations within Aberdeen, NO2 levels at 2019 averaged 26.83 microgrammes per cubic metre.

**Target:** To continue to reduce the levels of NO2 at Monitoring Stations to maintain levels below the WHO annual mean guideline of 10 µg/m3 throughout the period of the RTS to 2040.



**Figure 3a: Concentrations of Nitrogen Dioxide, 2009-2021 and targets.**

Source: Aberdeen City Council Air Quality Reports and WHO Air Quality Guidelines, 2022

One of the key aims of the RTS is to improve air quality, to ensure that there are no exceedances of World Health Organisation (WHO) and Clean Air for Scotland (CAfS) standards. Air Quality Management Areas were declared in parts of Aberdeen due to levels of Nitrogen Dioxide (NO<sub>2</sub>) and Particulate Matter (PM<sub>10</sub>) exceeding acceptable levels. These pollutants are primarily resulting from traffic. Monitoring stations are in place and as can be seen from Figure 3a, concentrations of NO<sub>2</sub> have been falling and are now within initial limit levels of 40 microgrammes per cubic metre, at all of the monitored sites.

However, there are no “safe limits” for such pollutants and the World Health Organisation have reduced the high-level target for annual mean concentrations from 40 microgrammes per cubic metre, to 10µg/m<sup>3</sup>.

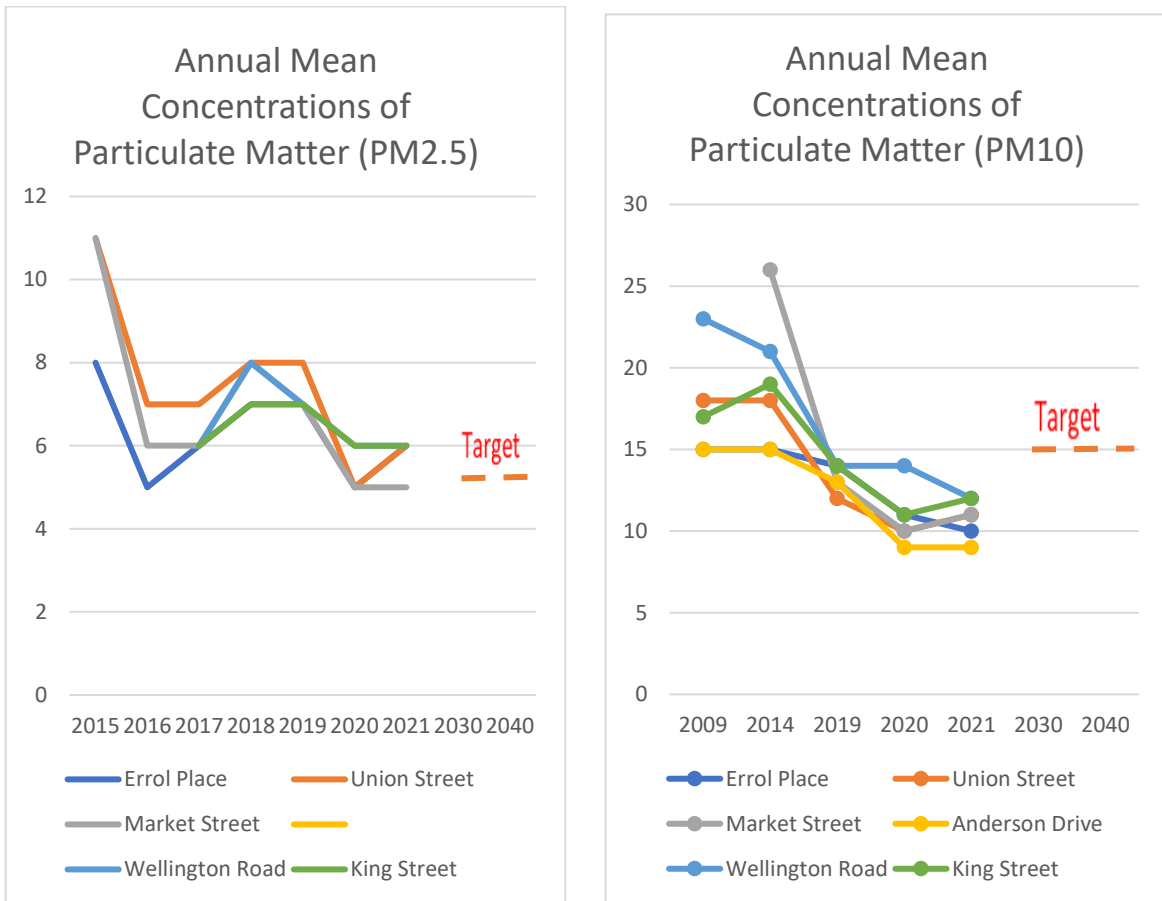
**2023 Update:** Levels of Nitrogen Dioxide at monitored sites reduced significantly in 2020, partly as a result of reduced traffic during the pandemic. However, into 2021, there has been a small increase in NO<sub>2</sub> levels, although in all six reported locations, levels remain below the 2019 baseline levels.

### **3b Particulate Matter**

**Aim:** To reduce concentrations of Particulate Matter, such that World Health Organisation (WHO) and Clean Air for Scotland (CAfS) standards are met and no Air Quality Management Area designations are required.

**Baseline:** At five Monitoring Stations within Aberdeen, PM<sub>2.5</sub> levels at 2019 averaged 7.2 microgrammes per cubic metre, and at six Monitoring Stations within Aberdeen, PM<sub>10</sub> levels at 2019 averaged 13.33 microgrammes per cubic metre.

**Target:** To continue to reduce the annual mean levels of Particulates at Monitoring Stations to levels below the guideline values of 5 µg/m<sup>3</sup> for PM<sub>2.5</sub>s and below 15 µg/m<sup>3</sup> for PM<sub>10</sub>s, throughout the period of the RTS to 2040.



**Figure 3b: Concentrations of PM2.5s 2015 to 2021 and PM10s, 2009 to 2021 and targets**

Source: Aberdeen City Council Air Quality Reports and WHO Air Quality Guidelines, 2022

One of the key aims of the RTS is to improve air quality, to ensure that there are no exceedances of World Health Organisation (WHO) or Clean Air for Scotland (CAfS) standards. Air Quality Management Areas were declared in parts of Aberdeen due to levels of Nitrogen Dioxide (NO<sub>2</sub>) and Particulate Matter (PM<sub>10</sub>) exceeding acceptable levels. The Council also monitors levels of smaller particulates, PM<sub>2.5</sub>s. These pollutants are primarily resulting from traffic. Monitoring stations are in place and as can be seen from Figure 3b, concentrations of PM<sub>2.5</sub> and PM<sub>10</sub> have been falling and are now at levels within the original prescribed limits at all of the monitored sites. Note that PM<sub>2.5</sub> has only been reported since 2015 and hence the diagram on the left covers a shorter time period.

There are no “safe limits” for such pollutants and the WHO have recently produced guidelines indicating annual maximum means of less than 5 microgrammes for PM<sub>2.5</sub>. and less than 15 microgrammes per cubic metre for PM<sub>10</sub>s.

**2023 Update:** Levels of Particulates at monitored sites reduced in 2020, partly as a result of reduced traffic during the pandemic. However, into 2021, there has been a small increase in Particulate levels, although in all six reported locations, levels remain below the 2019 baseline levels.

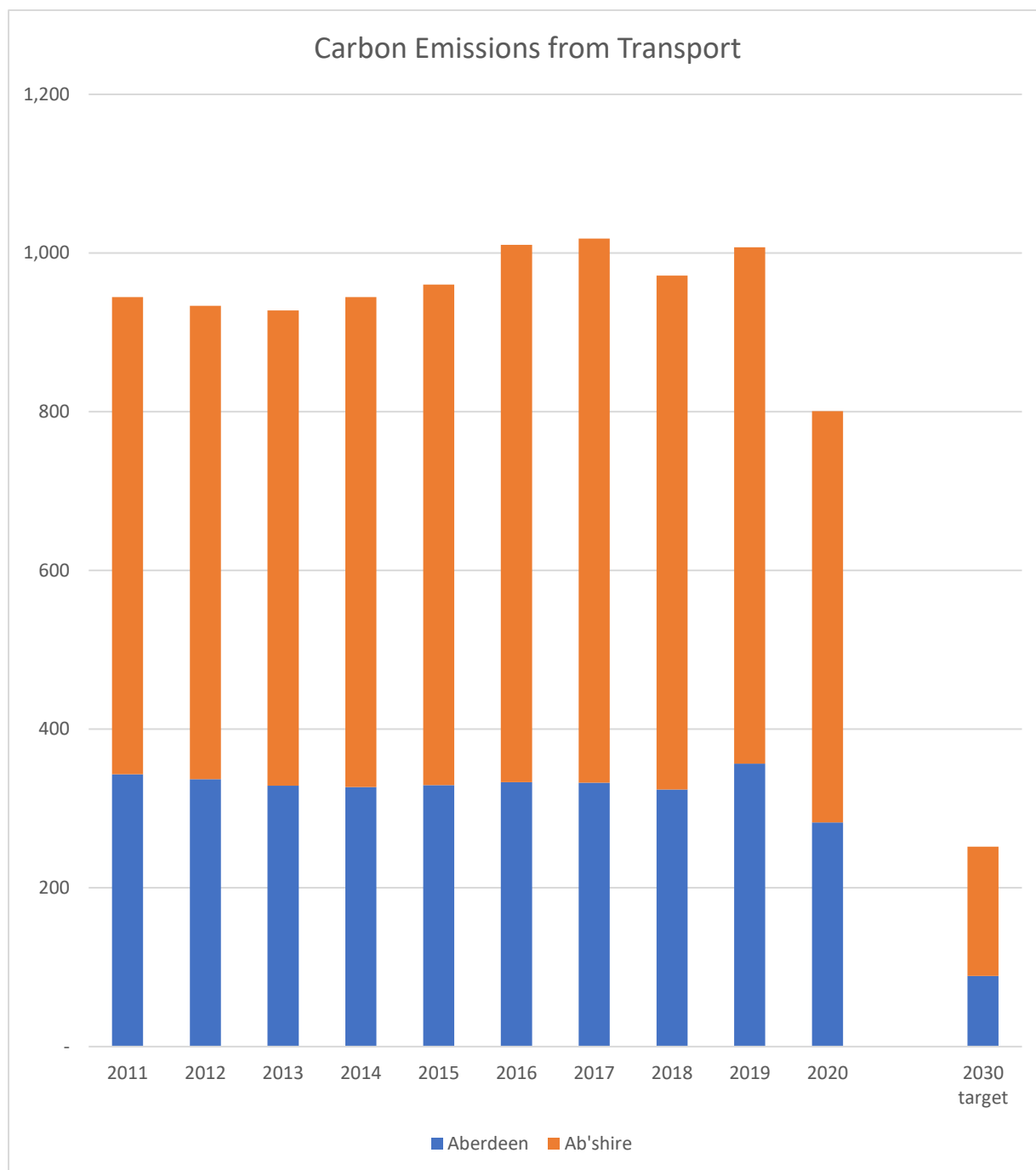
## 4 Reduced carbon emissions to support Net Zero

### 4a Transport emissions

**Aim:** To reduce carbon emissions from surface transport across the north east, to contribute towards commitments to net zero by 2040.

**Baseline:** Emissions from surface transport in the north east were estimated at 914 kiloTonnes carbon dioxide equivalent at 2019.

**Target:** To reduce emissions from surface transport by 75% by 2030 and by 100% by 2040 (229kT CO<sub>2</sub>e at 2030 and net zero by 2040).



**Figure 4a:** Carbon Emissions from Surface Transport, north east 2011 to 2020 and 2030 target.

Source: Department for Business, Energy & Industrial Strategy - UK local authority and regional estimates of carbon dioxide emissions, June 2022.

The Scottish Government has committed to a net zero carbon emissions target for Scotland by 2045. Although sectoral targets and interim targets have not yet been clearly defined, the scale of ambition will necessitate transport emissions being significantly reduced, especially in the period to 2030. As highlighted in the National Transport Strategy, transport emissions are the largest single sector, contributing in the order of 36% of the country's greenhouse gas emissions in 2019 – around 9.6% of the transport emissions were generated in the north east.

Both Aberdeen City Council and Aberdeenshire Council have committed to similarly ambitious targets and the Nestrans RTS reflects these in its aim to contribute towards net zero and aspires to do so by 2040, in advance of the national target. Since transport itself will not be offsetting by contributing carbon intake, the need for setting policies to get close to zero emissions are important. Similarly, since aviation and maritime emissions are difficult to measure and will require national and industry interventions to address the issues, it is likely that decarbonisation of surface transport will take on increased relevance.

According to the Department for Business, Energy & Industrial Strategy (UK local authority and regional estimates of carbon dioxide emissions) in 2020, emissions from surface transport in Aberdeen were 282.4kT CO<sub>2</sub> (27.9% of all emissions in the City) and in Aberdeenshire 518.3kT CO<sub>2</sub> (38.1% of all emissions in the Shire).

**2023 Update:** Carbon emissions from surface transport reduced by over 20% in 2020 compared to the previous year, partly as a result of reduced traffic during the pandemic.

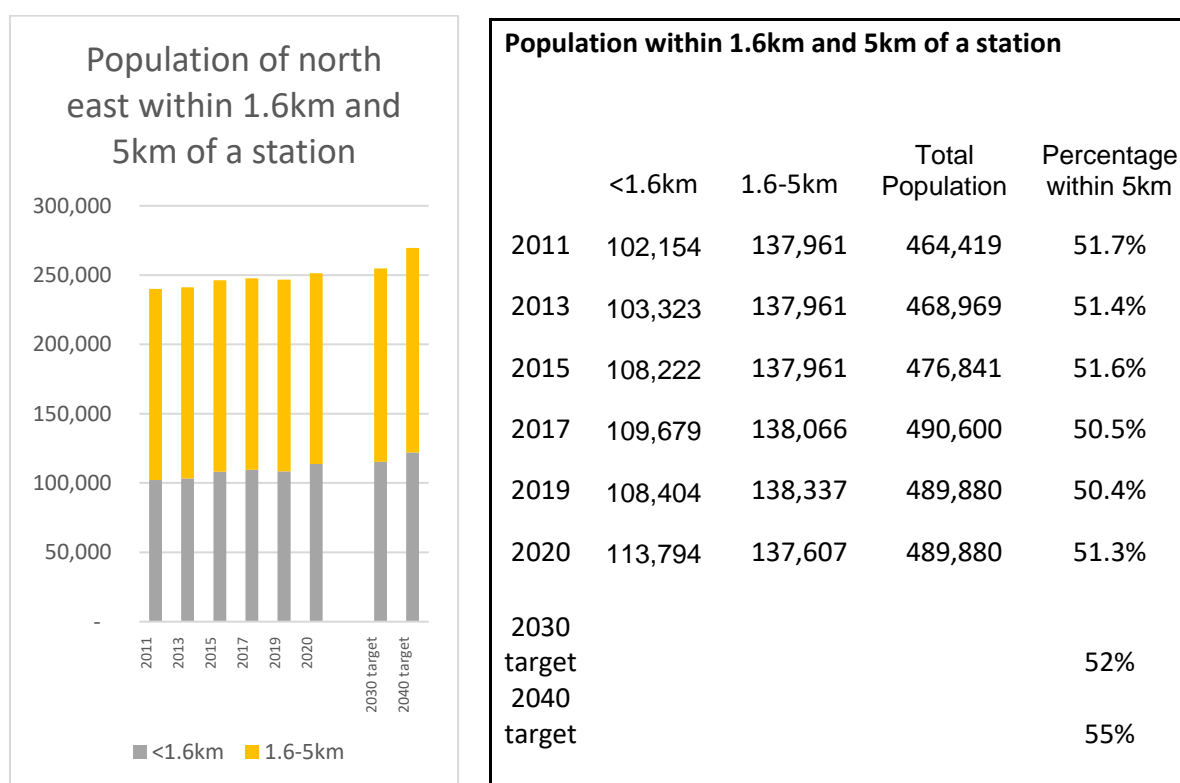
# 5 Accessibility

## 5a Public Transport – proximity of a station

**Aim:** To improve access to the railway network across the region.

**Baseline:** At 2019, 50.4% of the population live within 5 kilometres of a railway station.

**Target:** To increase the proportion of the north east population within 5 kilometres of a railway station to 52% by 2030 and to 55% by 2040.



**Figure 5a i): Population with 1.6km and 5km of a railway station, 2011 to 2020 and targets.**

Source: Aberdeen City Council and Aberdeenshire Council Small Area Population estimates.

The RTS aims to encourage use of public transport and a key factor is promoting rail patronage. An important element of that will be to improve access to the railway network, which in the north east is limited to just one line (Inverness to Aberdeen and then Aberdeen to the south) and just nine stations. It is a desire of Nestrans to increase the number of stations in the north east, and to focus development within station catchments, thereby increasing the proportion of the population with access to the railway.

**2023 Update:** With the opening of Kintore Station in October 2020, the population within 1.6 kilometres of a station has increased to nearly 114,000 (around 23.2% of the population) and the population within 5 kilometres increased to 251,400 (51.3% of the population).



**5a ii) Access for All at north east railway stations**

**Aim:** To ensure that all passengers have step free access to platforms at railway stations across the region.

**Baseline:** In 2019, the north east had eight railway stations, three of which were fully accessible, four partially accessible and one (Insch) without step-free access.

**Target:** To increase the number of stations within the north east to 11 stations by 2030, of which at least nine are fully accessible and to 13 by 2040 and for these all to be fully accessible to all users, including platform-to-platform access.

Stations 2022	Opened	Accessibility
Huntly		Partially accessible
Insch		No step-free access to west-bound platform
Inverurie		Partially accessible
Kintore	October 2020	Fully accessible
Dyce		Fully accessible. Overbridge with lifts implemented 2014
Aberdeen		Fully accessible to all platforms
Portlethen		Partially accessible
Stonehaven		Partially accessible
Laurencekirk	May 2009	Fully accessible

Partially accessible = step-free access to all platforms, but not platform to platform

**Figure 5a ii): Number of railway stations and levels of accessibility, 2022.**

Source: [www.scotrail.co.uk](http://www.scotrail.co.uk)

The Regional Transport Strategy sets out the case for developing the north east’s railway network, by investing in new stations and improving accessibility to all stations. With the opening of the station at Kintore in October 2020, the total number of stations increased to nine and the accessibility improved to 44% being fully accessible, from a 2019 baseline of 38%.

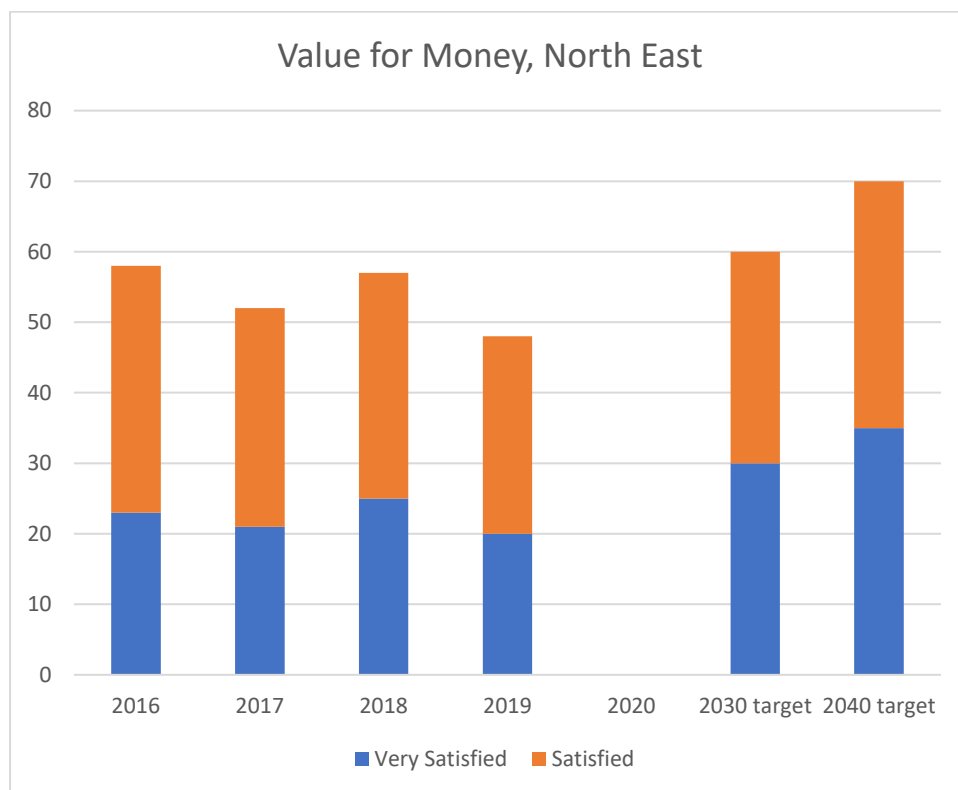
**2023 Update:** Nestrans has progressed the Accessibility at Insch Station study, but there are no physical improvements to accessibility at railway stations in the past year.

**5b i) Bus users' satisfaction with Value for Money**

**Aim:** To increase passenger satisfaction with the Value for Money of bus services.

**Baseline:** In 2019, 49% of fare-paying passengers expressed satisfaction with Value for Money of north east bus services.

**Target:** To increase passenger satisfaction with the Value for Money of bus services within the north east to 60% by 2030 and 70% by 2040.



**Figure 5b i): Bus Users' satisfaction with Value for Money, 2016 to 2019 and targets.**

Source: Transport Focus, Bus Passenger Satisfaction surveys.

Affordability is one of the important considerations when choosing how to travel. Although people with a disability or over 60 years of age are entitled to a concessionary travel pass and this was extended to include under 22s in 2022.

However, many regard bus tickets as expensive and this monitoring report intends to track passengers' perception of Value for Money for their bus services.

Nestrans contributes to Transport Focus' annual Bus Passenger Satisfaction Survey and the satisfaction amongst existing fare paying passengers is around 50% expressing satisfaction or very satisfied. The Bus Alliance will continue to survey fare-paying passengers' satisfaction and will aim to increase the levels of satisfaction to 70% by 2040.

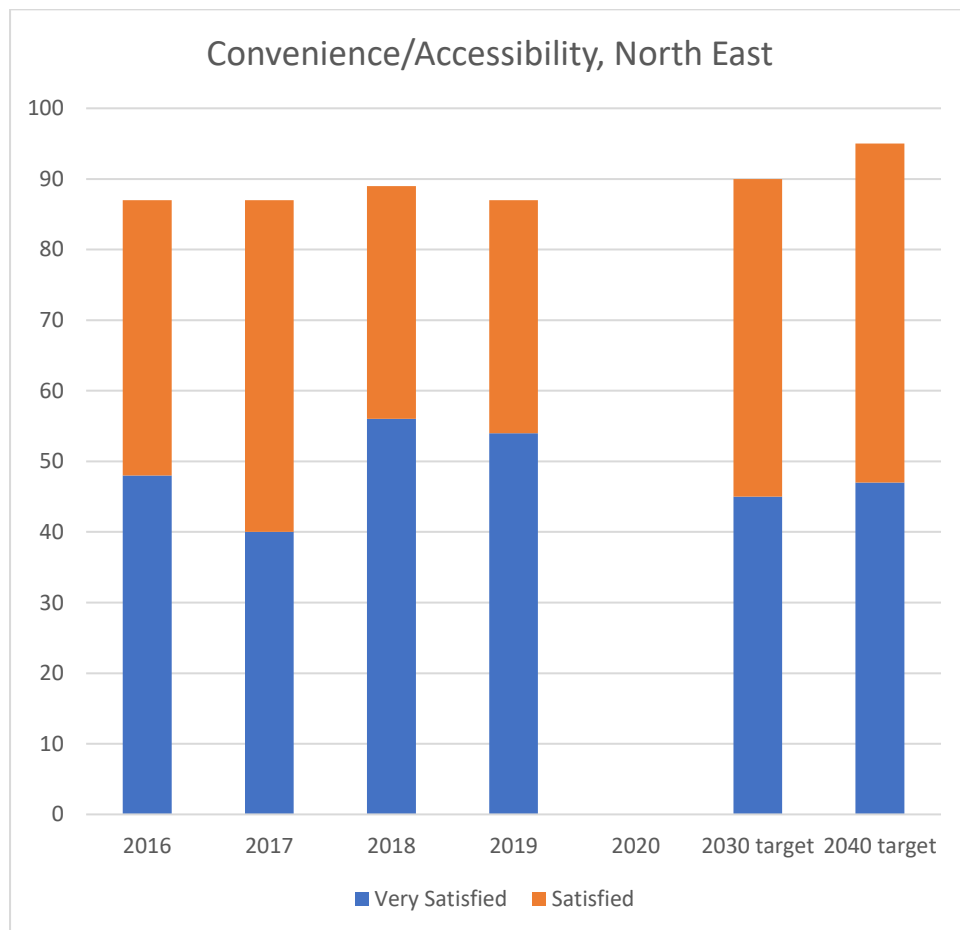
**2023 Update:** Since the covid-19 pandemic in 2020, Transport Focus has not conducted Bus Satisfaction surveys, which was the source for this indicator. It is hoped that surveys will resume in 2023.

**5b ii) Bus users' satisfaction with Convenience and Accessibility of bus services**

**Aim:** To increase passenger satisfaction with the convenience and accessibility of bus services.

**Baseline:** In 2019, 87% of passengers expressed satisfaction with the convenience and accessibility of north east bus services.

**Target:** To increase passenger satisfaction with the convenience and accessibility of bus services within the north east to 90% by 2030 and 95% by 2040.



**Figure 5b ii): Bus users' satisfaction with Convenience and Accessibility of bus services, 2016 to 2019 and targets.**

Source: Transport Focus, Bus Passenger Satisfaction surveys.

The RTS aims to encourage bus usage, but access to a bus service/bus stop is one of the key determinants of whether people will choose to use public transport, if they have a choice.

Nestrans contributes to Transport Focus' annual Bus Passenger Satisfaction Survey and the satisfaction amongst existing users in being able to access services conveniently is reasonably high, with 54% very satisfied and a further 33% satisfied. The Bus Alliance will continue to survey passenger satisfaction and will aim to increase the levels of satisfaction to 95% by 2040.

**2023 Update:** Transport Focus did not undertake Satisfaction Surveys in 2020, 2021 or 2022.



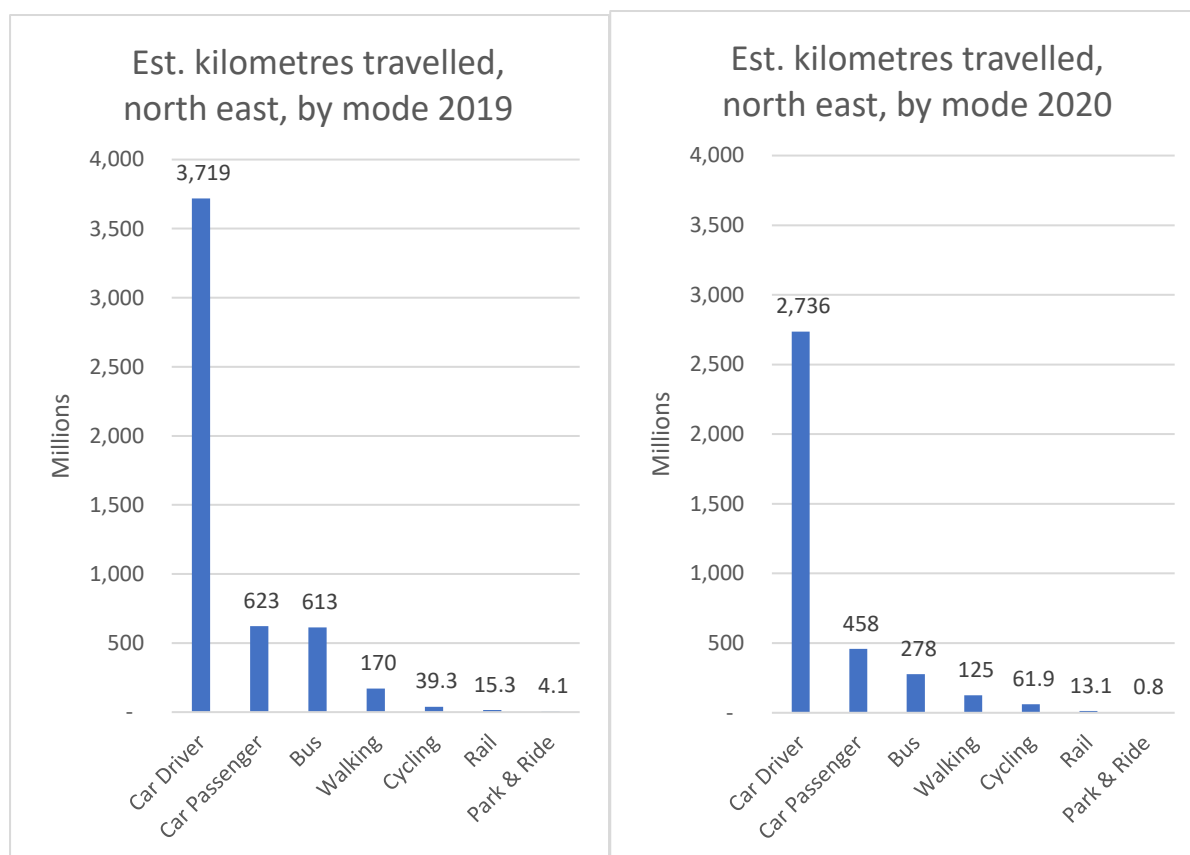
## 6 A Step Change in public transport and active travel, enabling a 50:50 mode split

### 6a i) Distance travelled

**Aim:** To reduce the overall travel demand across the north east by a quarter by 2040.

**Baseline:** It is estimated that 5.184 billion kilometres were travelled in the north east in 2019.

**Target:** To reduce total travel distance to less than 4.7 billion km by 2030 and to less than 3.9 billion km per year by 2040.



**Figure 6a i): Estimates of kilometres travelled by mode, north east, 2019 and 2020**

Source: Estimates based on Scottish Transport Statistics, DfT traffic counts and Nestrans Monitoring Reports (Note that rail data is for 2019/20 and therefore is not as significantly impacted by the pandemic restrictions).

It is estimated that a total of nearly 5.2 billion kilometres were travelled within the north east in 2019 – this reduced to 3.7 billion kilometres in 2020. Of this, an estimated 2.7 billion km is by car driver, and 458 million km by passengers. Bus accounts for an estimated 278 million km, rail 13 million km and Park & Ride around 0.8 million kilometres. Walking is estimated to total some 125 million kilometres and cycling around 62 million km.

In 2020, a further 936 million kilometres are estimated to be travelled by goods vehicles within the region - 194 million km (or 21%) by Heavy Goods Vehicles and 742 million km (79%) by vans or Light Goods Vehicles.

Travel to and from the north east in 2019 was estimated to account for a further 5.2 billion km – in 2020, this reduced to 3.1 billion kilometres: 971 million km through Aberdeen International Airport, 22 million km by ferries, 295 million km by rail and 1.8 billion km by car.

By reducing demand for travel through increasing technological changes (e.g. people working more flexibly including increasingly from home, conducting virtual business meetings or educational functions and increasing online retail activities), shortening travel distances (through more localised service delivery, shopping more locally and the development of 20-minute neighbourhoods for example), it is anticipated that demand for travel overall may reduce. Nestrans' RTS will seek to ensure that such changes result in reducing demand for car driving.

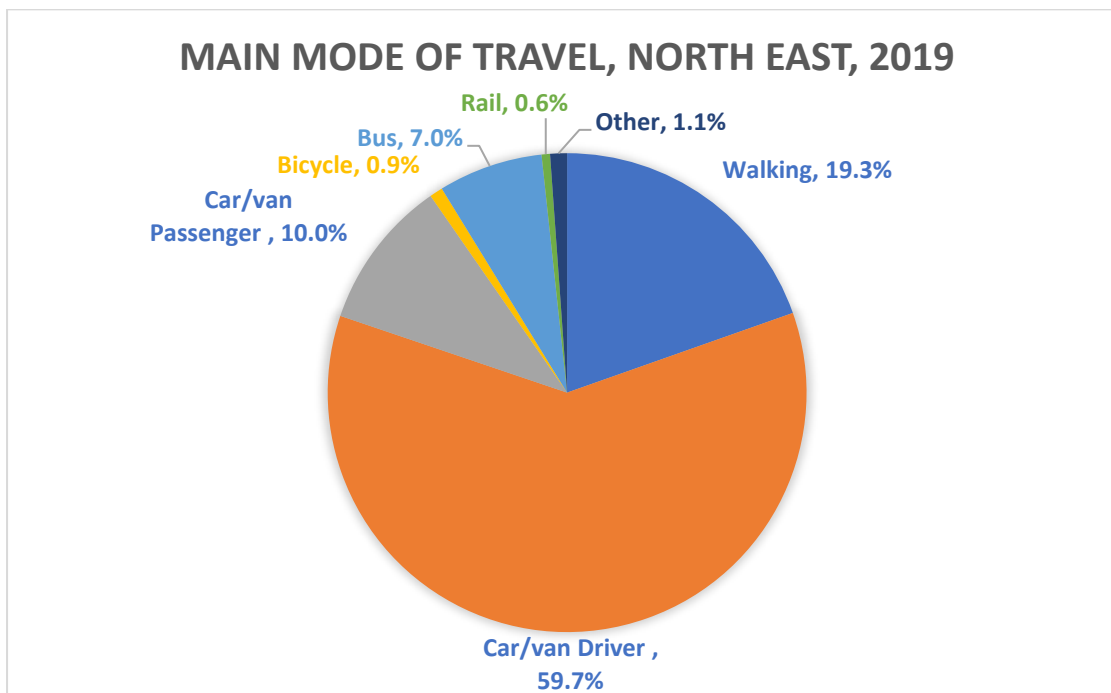
**2023 Update:** The covid-19 pandemic in 2020 and associated restrictions on travel had major and significant impacts on travel distances. It is currently unknown whether demands will return to pre-pandemic levels or will settle at a lower level than before. Transport Scotland has not published information and no Household Survey has been undertaken since 2019. Nestrans will seek to undertake appropriate surveys to provide meaningful monitoring – this should include local surveys compatible with previous data and include information on Working from Home.

**6a ii) % Mode split**

**Aim:** To reduce the proportion of trips made by car drivers.

**Baseline:** In 2019, 59.7% of respondents across the north east cited car driving as their Main Mode of Travel.

**Target:** To increase the proportion of people walking, cycling, using public transport or car sharing such that fewer than 50% of people will rely on car driving as their Main Mode of Travel by 2040 (interim target fewer than 55% by 2030).



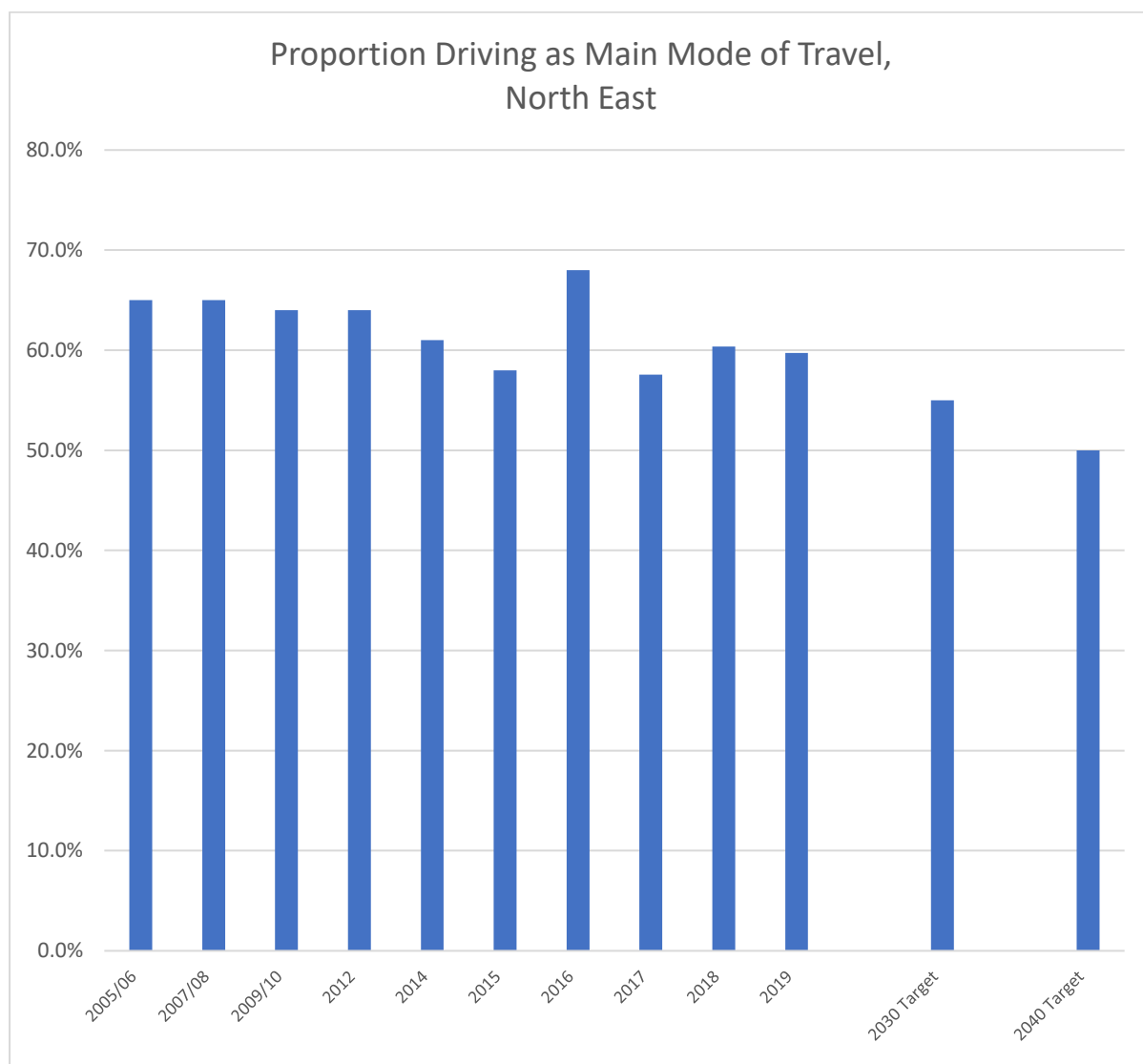
**Figure 6a ii): Main Mode of Travel, North East 2019.**

Source: Scottish Household Survey Travel Diary.

The Regional Transport Strategy identifies the need to influence mode choice to achieve its objectives. At 2019, around 60% of people regarded car driving as their main mode, with a further 10% being car passengers. Just under 20% walk as their main mode, with 7% using bus and 0.6% rail.

Nestrans encourages a shift to public transport and active travel, but will also try to encourage car sharing where appropriate and other sustainable options such as working from home, if suitable. The RTS does not contain specific targets for each mode, since they can be in competition (an improved rail service may reduce bus patronage, improved buses may result in fewer people walking, good cycling facilities may reduce the numbers car sharing, etc.). Rather, the Strategy seeks to achieve a mode shift from car driving to alternatives, including work from home, sharing, public transport and active travel. Working through the Getabout partnership promoting sustainable travel, the overarching aim is to see a greater number of trips by alternatives than those being driven. This is articulated in the 50:50 mode share aim and the proportion of trips driven is shown in the following figure.

**2023 Update:** Since the covid-19 pandemic in 2020, the Government has not conducted the Scottish Household Survey, which was the source for this indicator. It is hoped that surveys will resume in 2023.



**Figure 6a iii): Proportion citing their Main Mode of Travel as Driving, 2005/06 to 2019 and targets.**

Source: Scottish Household Survey Travel Diaries.

**2023 Update:** Since the covid-19 pandemic in 2020, the Government has not conducted the Scottish Household Survey,, which was the source for this indicator. It is hoped that surveys will resume in 2023.

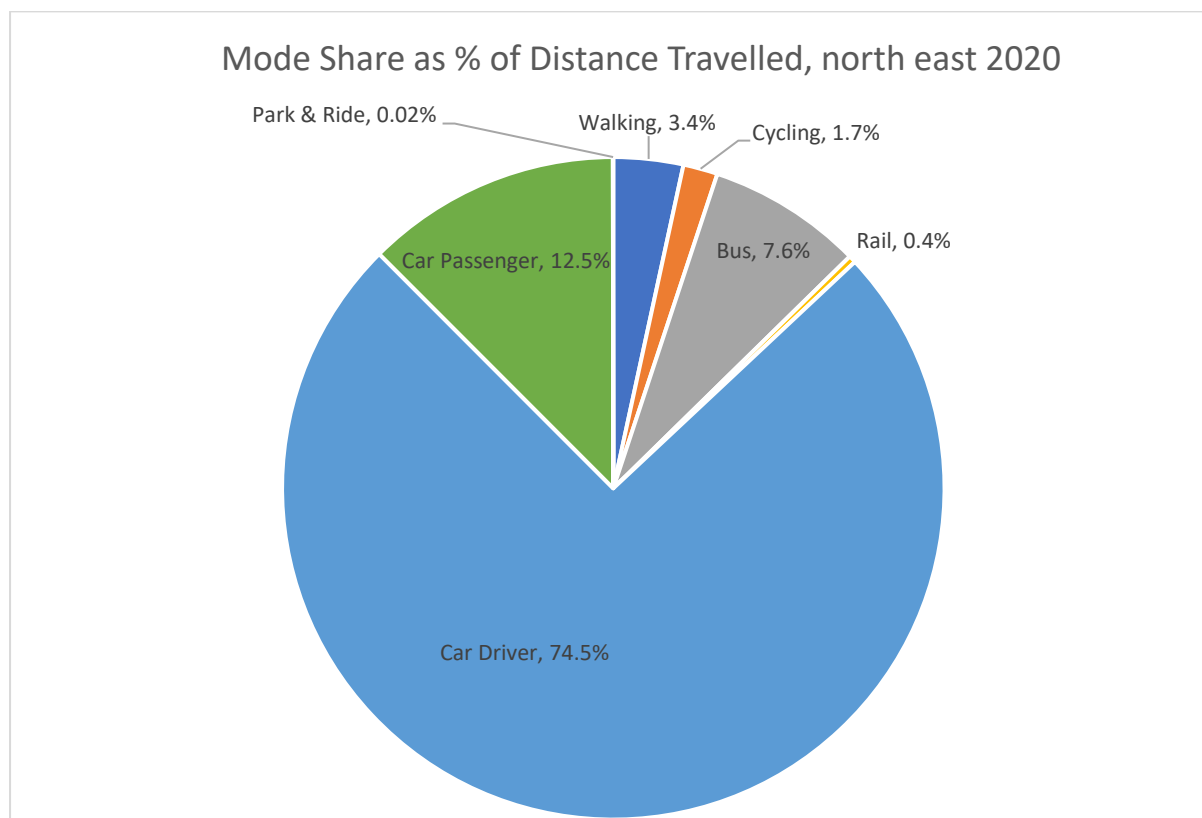


**6b: Proportion of Travel Distance by Car Driver**

**Aim:** To reduce the proportion of travel across the north east by car driving to less than half of distance travelled by 2040.

**Baseline:** It is estimated that 72% of distance travelled across the north east in 2019 was by car drivers.

**Target:** To achieve a 50:50 mode share of distance travelled between driving and other methods of travel by 2040 (interim target of less than 60% by 2030).



**Figure 6b ii): Estimate of proportions mode share by distance, north east, 2020.**

Source: Estimates based on Scottish Transport Statistics, DfT traffic counts and Nestrans Monitoring Reports.

Inevitably, trips made by modes such as active travel will tend to be shorter trips and the Strategy will seek to encourage short trips to be made by such options. The Strategy will also seek to influence other policy documents such as Local Development Plans to enable shorter journeys to be available by ensuring compatible land uses, local retailing, jobs close to residences and other services within 20-minute neighbourhoods where viable.

However, the Strategy will also seek to ensure that long distance trips can be replaced, through digital and other technological advances or by transfer to rail or long-distance bus for inter-urban trips. An estimate has been made of mode share as proportion of distance travelled and will be monitored over the period of the Strategy.

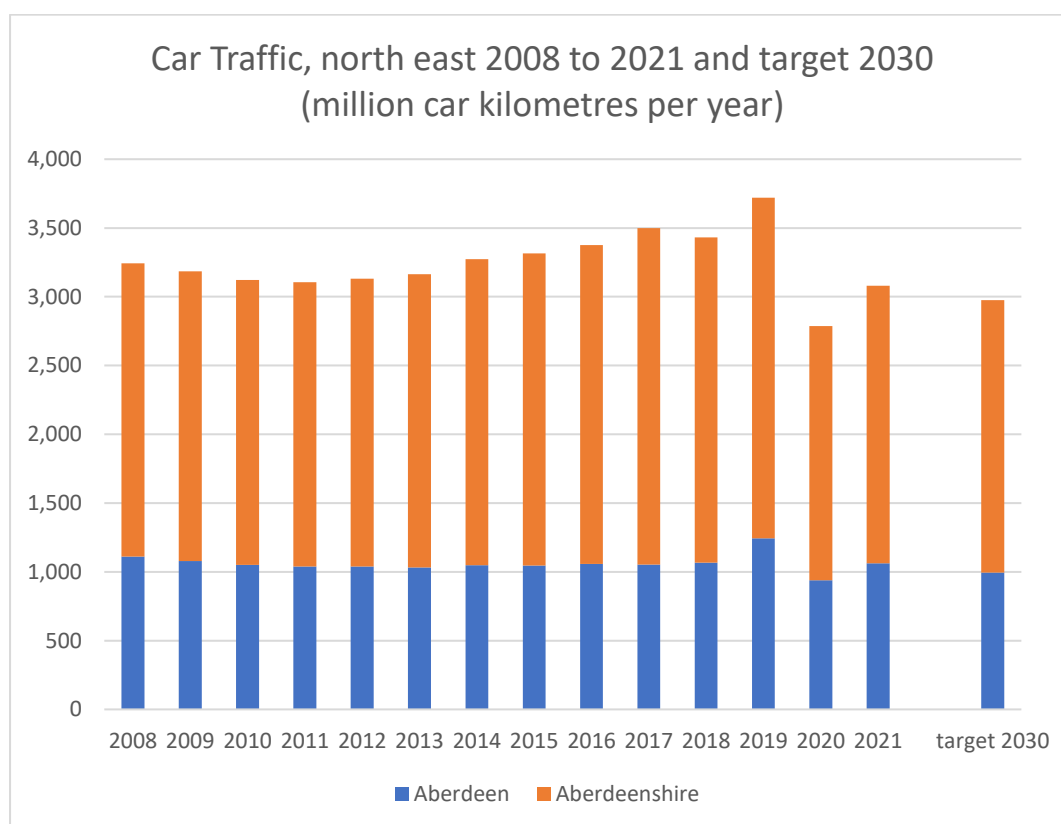
**2023 Update:** Although the covid-19 pandemic in 2020 had a major influence on travel choices and in particular overall travel distances were down, the proportions of distance by mode have changed only slightly. Car driving is up from 72% to 74.5%, whereas bus journeys fell from 12% of distance travelled to around 8%.

**6c Reduction in car kilometres driven**

**Aim:** To reduce by 20% car kilometres travelled across the north east by 2030 and maintain that level to 2040.

**Baseline:** 3.72 billion kilometres in 2019

**Target:** To reduce car kilometres travelled across the north east to less than 3 billion kilometres by 2030 and maintain that level to 2040.



**Figure 6c: Car kilometres travelled, north east 2008 to 2021 and target.**

Source: Dept for Transport, Traffic by Local Authority. Table TRA8905.

At 2019, traffic in the north east travelled some 4.910 billion kilometres, representing around 10.1% of all Scotland’s traffic. At that time, in Aberdeen, 1.568 billion km were travelled and in Aberdeenshire 3.342 billion km – this represents an increase since 2011 of 22% and 23% respectively, almost double the Scottish growth rate of 12.2% in the same period.

Cars were estimated to contribute around 75.7% of all traffic in the north east, constituting approximately 3.719 billion kilometres driven – this forms the baseline for traffic reduction targets. The Scottish Government has committed in its Climate Change Plan update 2020, to reduce car kilometres travelled by 20% by 2030. Nestrans’ Regional Transport Strategy echoes this ambition and therefore the implication would be a target of no more than 2.975 billion km by 2030.

**2023 Update:** As a result of the covid pandemic and resulting travel restrictions for much of the year, total traffic in the north east declined during 2020 to 3.87 billion vehicle kilometres (a reduction of 21.2% on the previous year). In 2021, total traffic was 4.21 billion vehicle kilometres, around 73.1% of which was car traffic.

Car traffic reduced to 2.79 billion kilometres in 2020 (down by 25.1% on 2019) and then bounced back slightly to 3.08 billion kilometres in 2021 (17.2% below the 2019 level).