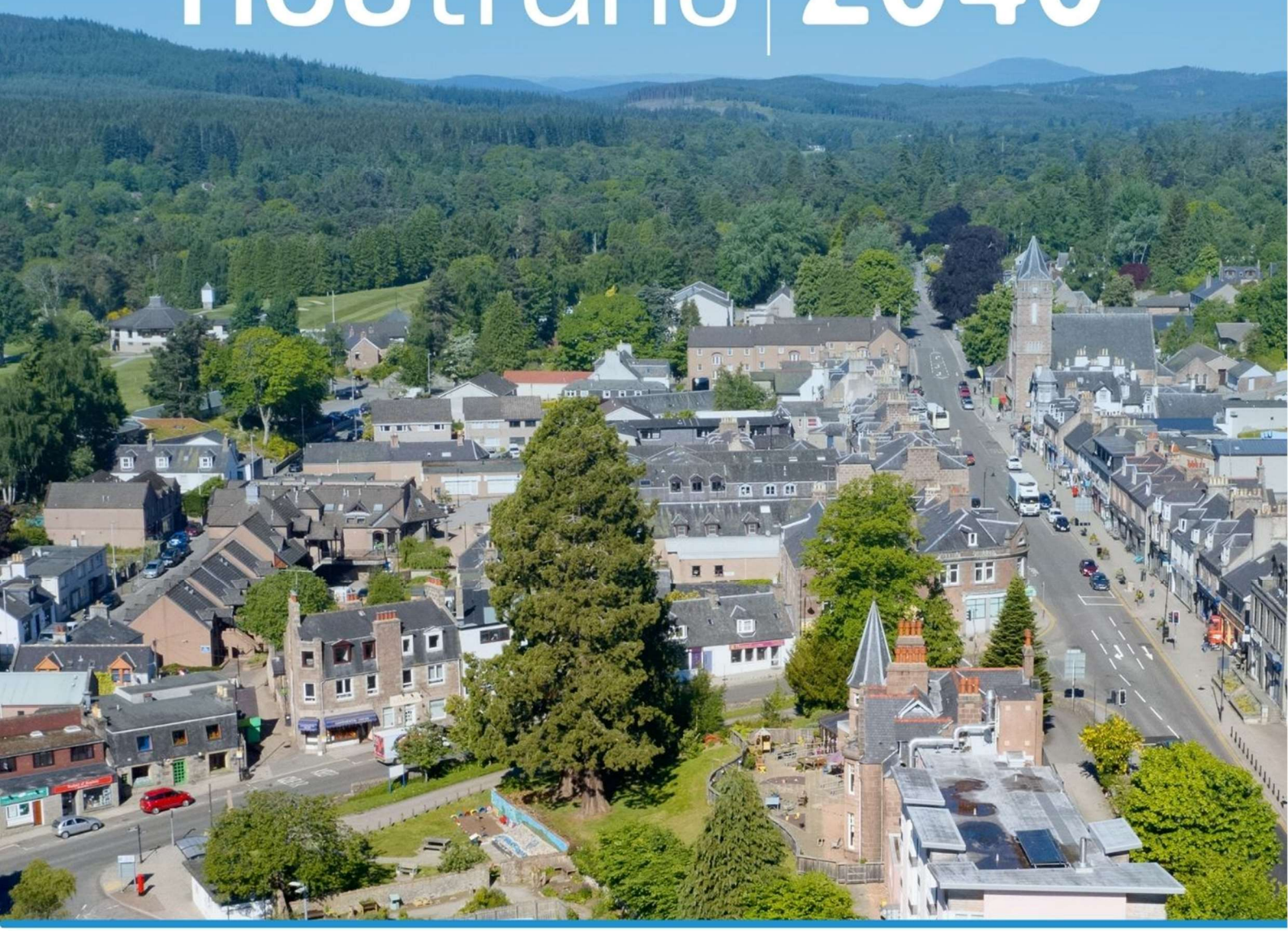
nestrans | 2040



Regional Transport Strategy:

EVALUATION REPORT

June 2024

nestrans

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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. Alongside on a three yearly basis completing an evaluation report which will include additional data of interest.

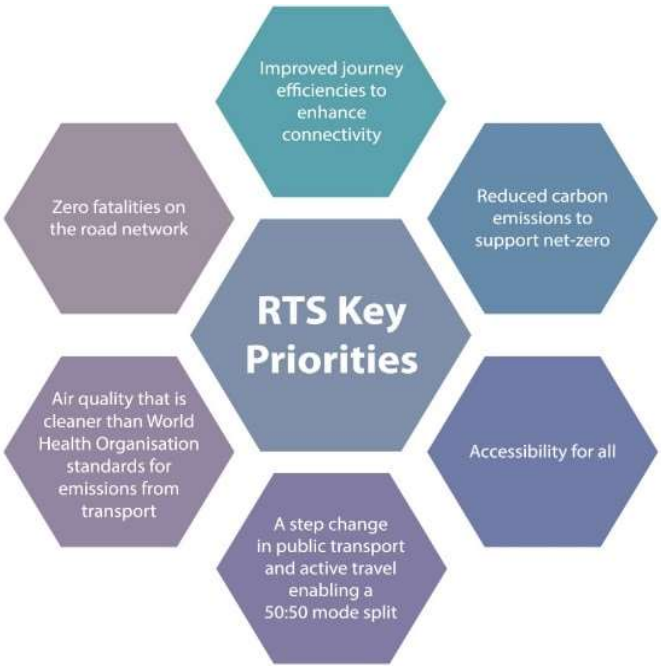
This is the first evaluation report that has been produced for the updated Regional Transport Strategy, Nestrans2040. The indicators that are included in the yearly monitoring report remain at the heart of the monitoring process and additional data is included for enhanced context. The sources of this additional data is varied and the following examples are some of the sources that could be used: additional survey data, qualitative data and lived experience from stakeholder groups, studies, projects, partners and the public. Using this additional data will help to show broader trends with more detail, with the ability to add supporting narrative and analysis.

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 2022, 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.

Alongside the twenty targets, this evaluation report includes additional data of interest. Firstly there is additional information provided on the current key data metrics for the region that are worth highlighting such as population change and car ownership. Then follows additional information located within the six priorities such as connectivity of different modes, the number of electric vehicles in the region and active travel data.

Identifying targets

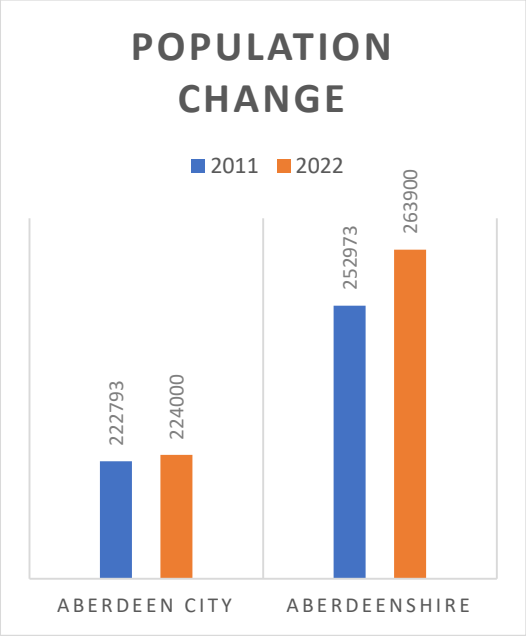
As mentioned above, a total of twenty targets were identified and agreed. The targets should provide decision-makers with the information necessary to determine whether policies and interventions are succeeding in influencing the following:

Connectivity	1a – Improving Rail journey times
	1b i) – Car travel times
	1b ii) – Bus travel times
	1c – HGV journey times
Road Casualty Reduction	2a – Fatalities in Road Traffic Collisions
	2b – All severities of injuries
	2c i) – Reducing the number of pedestrians killed or seriously injured
	2c ii) – Reducing the numbers of cyclists killed or seriously injured
Reducing harmful emissions	3a – Reducing concentrations of Nitrogen Dioxide
	3b i) – Reducing concentrations of Particulate Matter (PM2.5)
	3b ii) – Reducing concentrations of Particulate Matter (PM10)
Moving towards Net Zero Carbon	4 – Moving towards Net Zero carbon emissions from surface transport
Accessibility	5a i) – Proximity of a station to where people live
	5a ii) – Accessibility of railway stations
	5b i) – Satisfaction of bus users with value for money
	5b ii) – Satisfaction of bus users with convenience and accessibility of services
Modal Shift	6a i) – Reducing overall demand for travel
	6a ii) – Influencing proportions of travel choice by mode
	6b – Lessening dependence on car travel
	6c – Reducing the amount of car travel across the region

Key Regional Data Metrics

Population Trends

In September 2023, Scotland's Census published a first batch of data for 2022. Included in this was the population estimates across Scotland and below are tables showing the population change in the region between the 2011 Census and 2022 Census. Alongside this is the estimated change in age structure in the region over the same period.



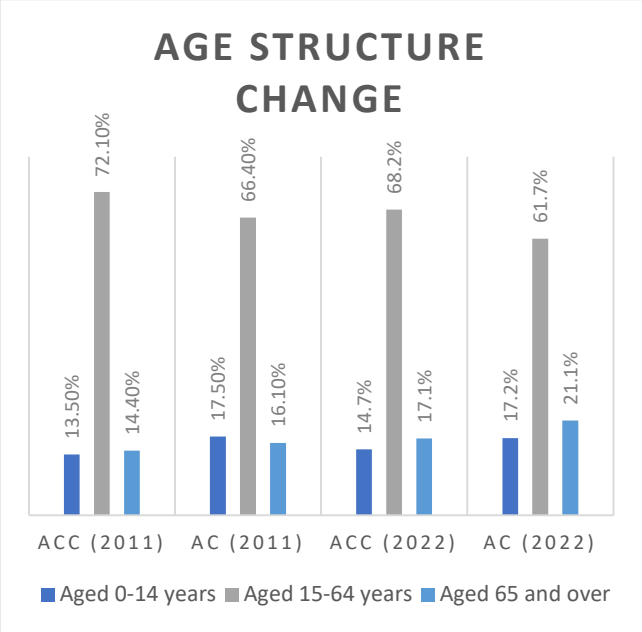


Figure a (Left): North East of Scotland Population Change

Figure b (Right): North East of Scotland Age Structure Change

Source: Scotland's Census Data (2011 & 2022)

Figure a shows a growth in population in both local authority areas between the two census collections. Across Scotland over this period, there has been a growth in population of 2.7% compared to 0.5% in Aberdeen City and 4.3% in Aberdeenshire.

Figure b shows the age structure change in both local authority areas across the two data collections. It is noted that the region continues to see growth in an ageing population with both local authorities seeing a percentage growth in residents aged 65 or over (Aberdeen City 19.6% and Aberdeenshire 36.9%). This compares to a national growth in this period of 22.5%.

Area & Households

Below is the area of the region and the number of households as of 2022. Figure c shows the trend in the average household occupancy in the last ten years (2012-2022) for both local authority areas (Aberdeen City and Aberdeenshire) and the Scotland-wide average.

	Population (2022)	Area (sq km)	Area (sq miles)	Number of households (2022)
Aberdeen City	224,000	186	72	109,827
Aberdeenshire	263,900	6,313	2,437	114,897
North East	487,900	6,499	2,509	224,727
Scotland	5,436,600	77,937	30,092	2,549,797
North East as a % of Scotland	9.0%	8.3%	8.3%	8.8%

Table a: Area & Household Data – Local Authority, Regional and National

Source(s): Scotland Census 2022 & Scottish Government Statistics

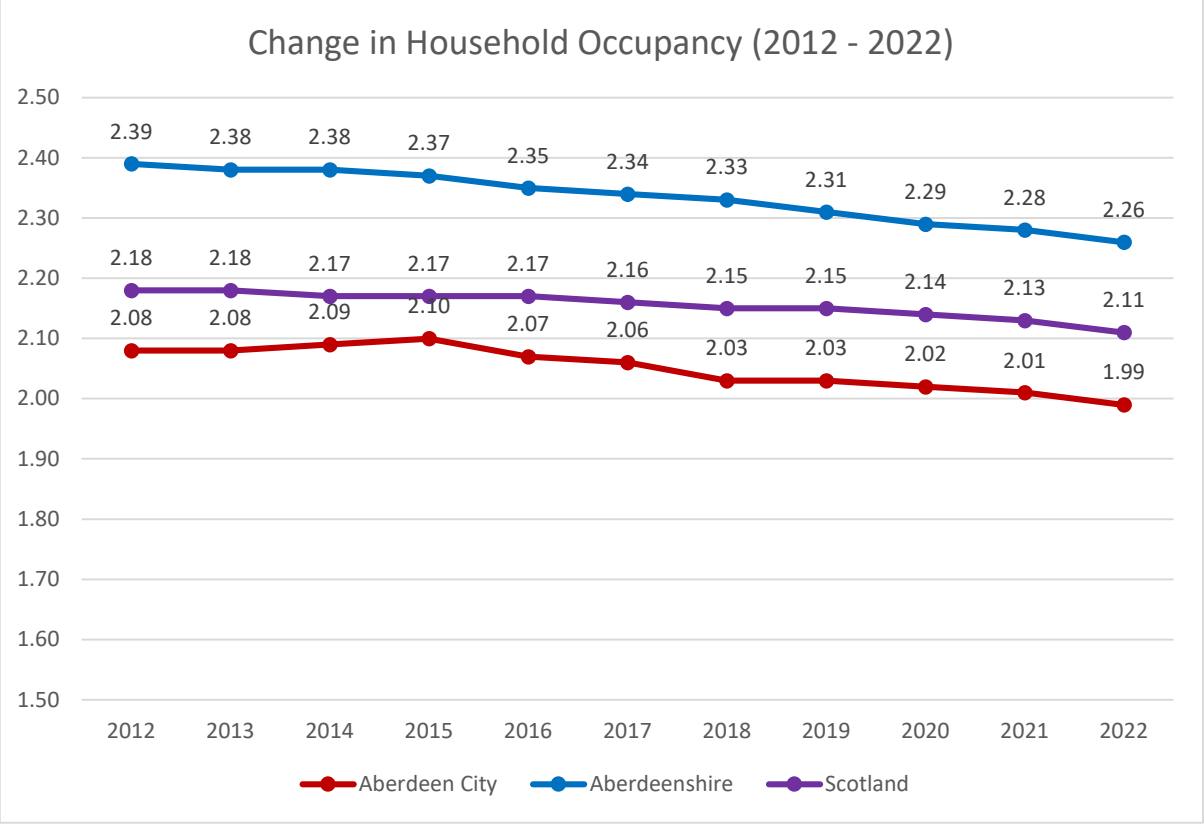


Figure c: Change in Household Occupancy in the NE and Scotland

Source: National Records of Scotland

Table a shows that the size of the area continues to remain the same for the two local authority areas as when they were established in 1996, equating to the region representing 8.3% of the national area. It is therefore noted that both population and number of households surpass this at 9.0% and 8.8% respectively. Figure c shows the change in household occupancy over the last decade (2012-2022) with both regionally and nationally a decline in the size of households (ie more households per thousand people). It should be noted that for Aberdeen City students are not included within these estimates.

Vehicle Ownership

In the Comprehensive Travel Study conducted by Nestrans in 2023, survey participants were asked 'How many vehicles do you have access to in the household either as a driver or passenger?'. Figure d below shows the results from this question for both local authority areas (Aberdeen City and Aberdeenshire).

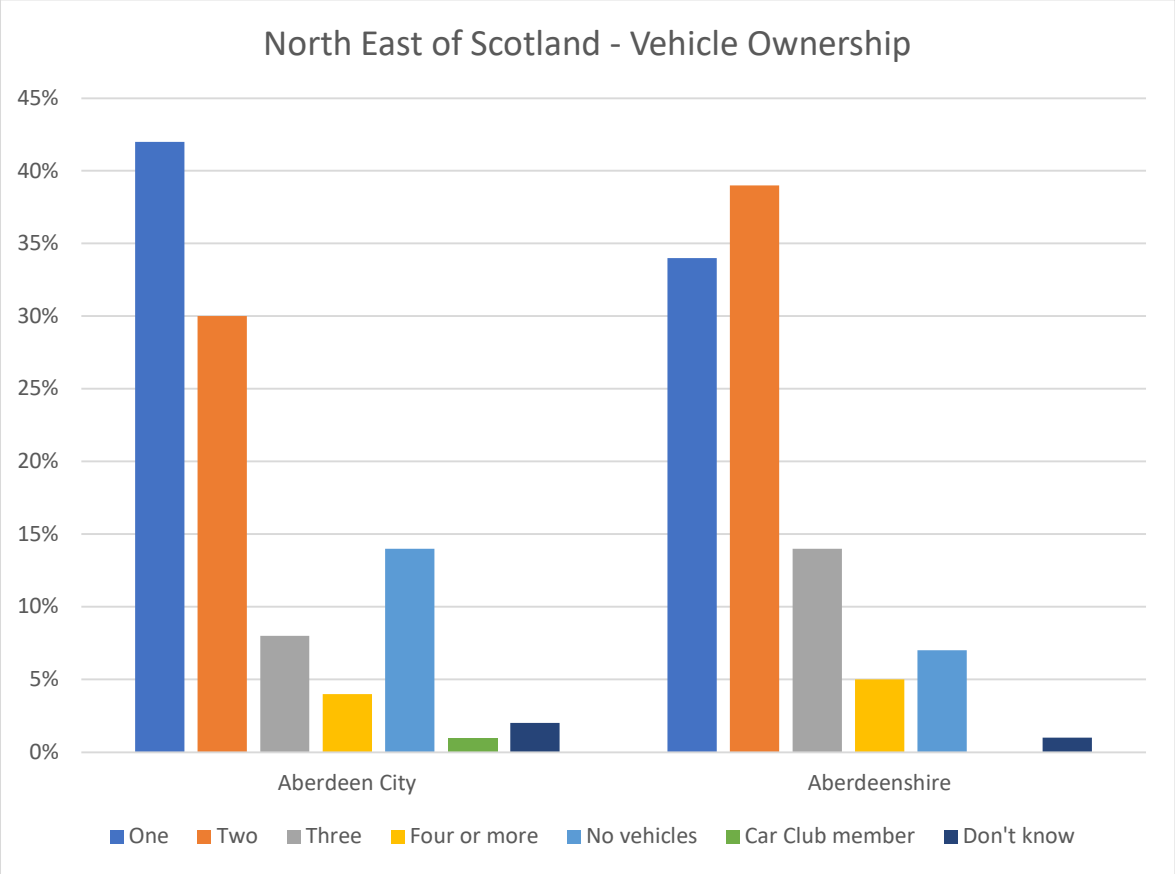


Figure d: North East of Scotland – Vehicle Ownership

Source: Comprehensive Travel Study - 2023

It can be seen from Figure d that the majority of respondents were in households with access to at least one vehicle with 14% in Aberdeen City and 7% in Aberdeenshire not having access to a vehicle. It is noted that in Aberdeen City the highest value is access to one car (42%) whilst in Aberdeenshire access to two cars is highest (39%). Linking with the household occupancy graph above, Aberdeenshire has a higher household occupancy compared to Aberdeen City and this is a possible contributing factor to the majority of Aberdeenshire residents surveyed having access to two cars.

Road Kilometres Travelled

Below is a graph showing the traffic on roads in the region broken down based on vehicle type. The graph uses 2022 data and has estimated that in that year a total of 4.57 billion vehicle kilometres occurred on the region's road network.

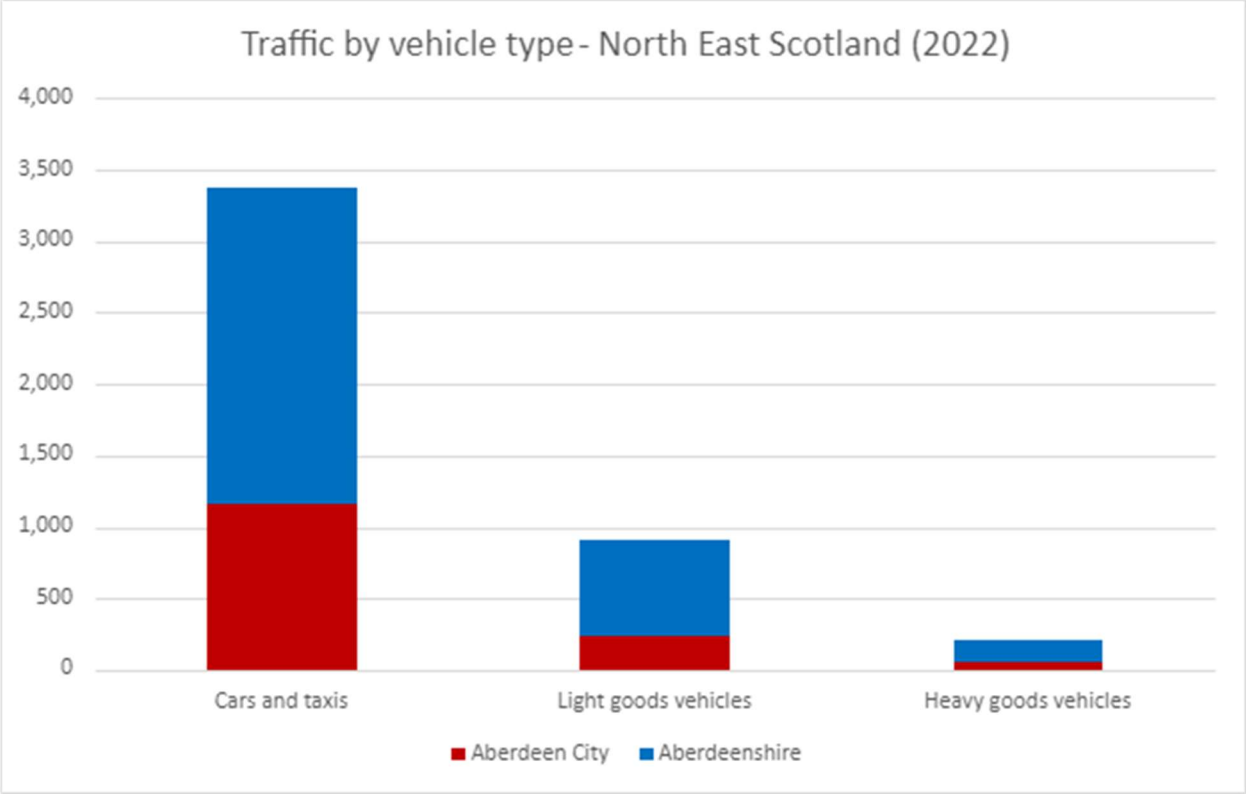


Figure e: North East of Scotland Traffic by vehicle type (thousand kilometres)

Source: Department for Transport

It can be seen from Figure e that the higher number of vehicle kilometres in 2022 occurred on roads within Aberdeenshire and this is likely due to the greater area that it covers (as shown in Table a) and therefore a larger road network. It is also worth noting that the above accounts for 9.7% of Scotland's traffic by motor vehicles in 2022. Furthermore, Aberdeenshire accounted for the local authority area with the most kilometres by light goods vehicles (LGV) making up 7.3% of Scotland's LGV traffic.

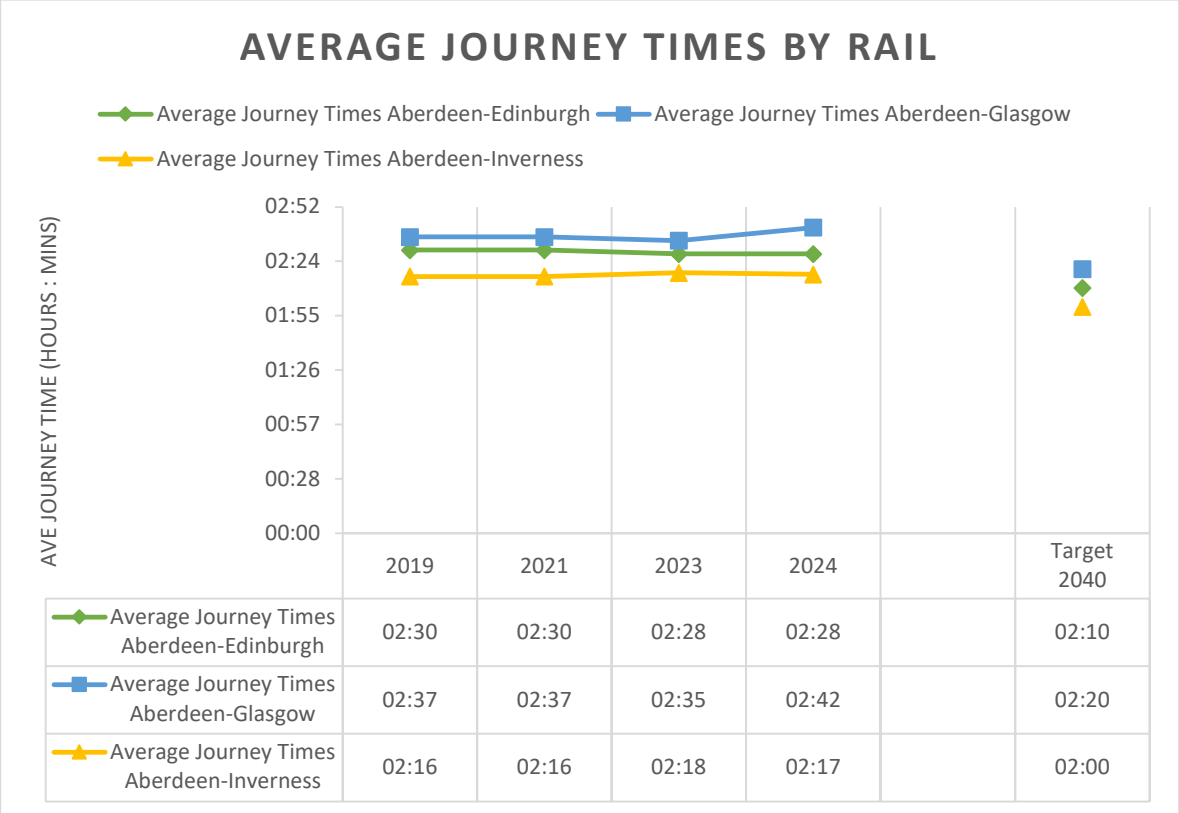
1) Improved journey efficiencies to enhance connectivity

1a – Journey times by rail

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

2019 Baseline: Average rail times from Aberdeen – 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 minutes to Edinburgh; 2 hours 20 minutes to Glasgow and 2 hours to Inverness by 2040.



	2019	2021	2023	2024		Target 2040
Average Journey Times Aberdeen-Edinburgh	02:30	02:30	02:28	02:28		02:10
Average Journey Times Aberdeen-Glasgow	02:37	02:37	02:35	02:42		02:20
Average Journey Times Aberdeen-Inverness	02:16	02:16	02:18	02:17		02:00

Figure 1a: Average journey times by rail, Aberdeen to key destinations, 2019-2024 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" between Aberdeen and 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 line to Aberdeen 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.

2024 Update: There are small variations in average journey times to key centres, notably an increase in journey time between Aberdeen and Glasgow, which is partly as a result of the December 2023 timetable changes. Aberdeen to Edinburgh and Aberdeen to Inverness services, have seen no significant changes compared to the baseline. The Scottish Government has announced that it remains committed to the main line upgrade, although timescales have slipped due to budgetary constraints.

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.

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

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

Indicator 1b	**2023**	
	Car	Public Transport
Fraserburgh to St Cyrus	01:32	02:51
Peterhead to Banchory	01:07	02:23
Banff to Foresterhill	01:08	01:39
Turriff to RGU	01:00	01:51
Bridge of Don, Ellon Road @ N Donside to Dyce	00:12	00:43
Stonehaven to Airport	00:28	01:24
Braemar to Woodhill House	01:23	02:35
Huntly to Union Street, St Nicholas Kirk	00:59	00:59
Seaton to Altens	00:16	00:43
Portlethen to Kirkhill	00:24	01:30
Tillydrone to East Tullos	00:17	00:43
Cults to Menie House (AB23 8YE)	00:30	01:19
Total journey time	09:16	18:40
Average journey speed	39.5	19.6
	AA Route Planner	Traveline Scotland
*shortest journey time starting between 0800 and 0930, weekday		

Figure 1b i

Source(s): 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, these journeys were estimated to take a total of around 14 hours. However, this has reduced significantly since to around 11 hours in 2015 and in 2023 are estimated to total just over 9 hours, as indicated in Figure 1b i. 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.

2024 Update: There are small variations in average journey times with some journey times remaining the same as 2022 whilst a few journeys have seen a minor increase contributing to an overall rise estimated journey time compared to 2022.

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.

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

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

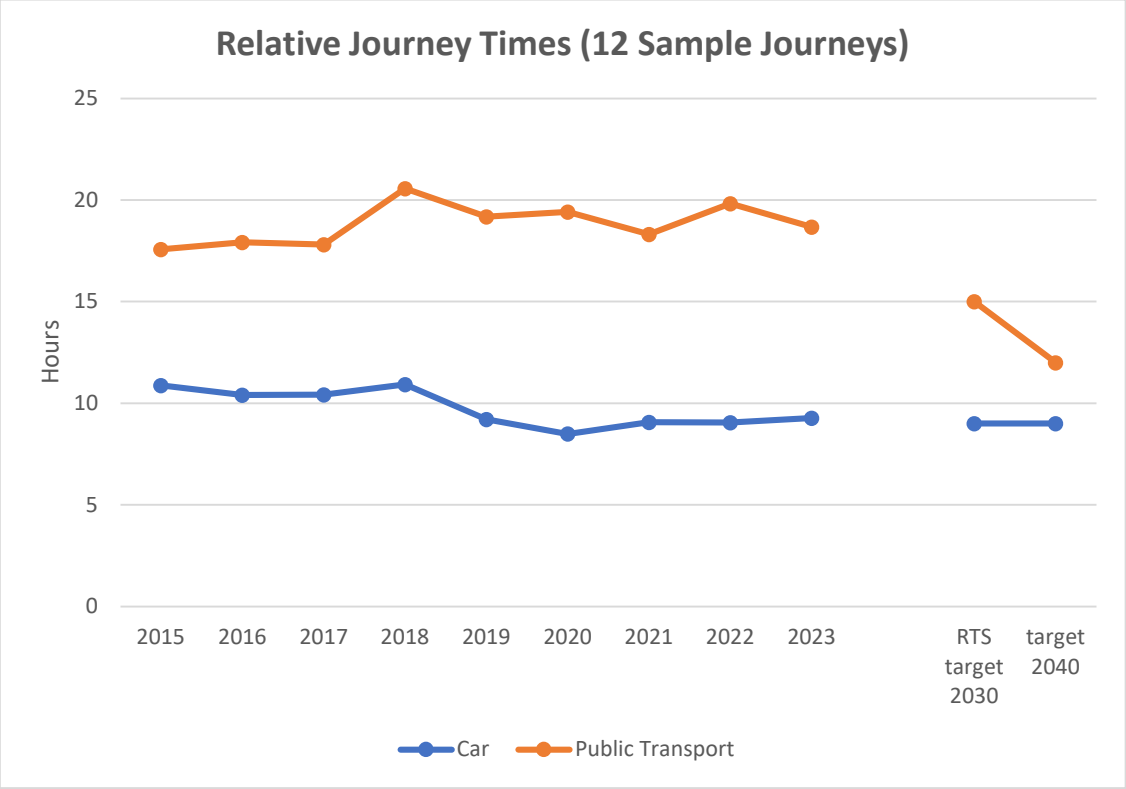


Figure 1b ii: Total journey times by car and public transport for 12 sample journeys, 2015 to 2023

Source(s): 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 1b i) 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.

It is important in 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 difference 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.

2024 Update: 2023 public transport journey times have seen a reduction compared to 2022 and are now similar to the 2021 baseline. However, public transport still remains at a factor of 2.01 to car journey times meaning it takes double the amount of time to travel the 12 journeys by public transport.

1c – Effective journey time for goods vehicles

Aim: To reduce the typical time taken by a HGV to access the national motorway network at Friarton Bridge in Perth from Peterhead Port to less than 2 hours and 30 minutes by 2040.

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

Target: Improved journey times for goods vehicles, towards average running speeds of 47mph by 2030 and 49mph by 2040, enabling a 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 *(Estimate of HGV journey time)*		
Year	**Time**	**Average Speed**
2021	02:43	44.91mph
2022	02:41	45.47mph
2023	02:44	44.63mph
Targets		
2030	02:36	46.92mph
2040	02:30	48.80mph

Figure 1c: Sample HGV journey time

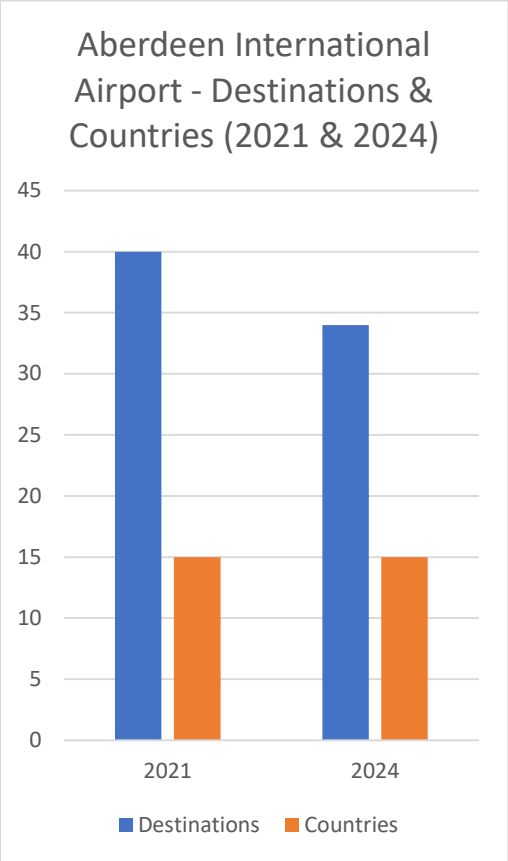
Source: AA Route Planner

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 a HGV can currently make the journey in around 2 hours 44 minutes, an average speed of 44.6 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.

2024 Update: There has been a small increase in the journey time for a HGV to access the motorway network, with a lower average journey speed compared to the 2021 baseline.

1d – Air Travel Connectivity

Figure 1d i shows the past and current destinations available from Aberdeen International Airport (AIA). Whilst Figure 1d ii shows the passenger traffic data for AIA in 2022.



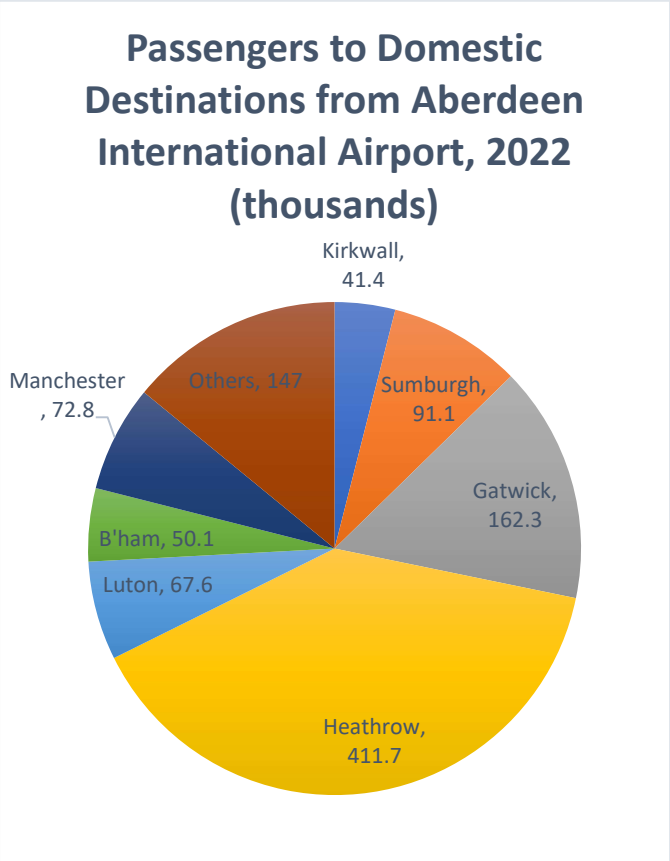


Figure 1d i (Left): Destinations from Aberdeen Airport (2021 compared to 2024)

Figure 1d ii (Right): Passenger numbers to domestic destinations from Aberdeen Airport (2022)

Source(s): Aberdeen International Airport website & Civil Aviation Authority (CAA)

Figure 1d i shows there has been a drop in the number of destinations available from Aberdeen International Airport. However, there remains 15 countries served directly from Aberdeen. Figure 1d ii shows the key destinations for the north east domestically. It can be seen Heathrow

makes up the largest demand from the region (411,700 passengers in 2022). It is noted the importance of air travel to the islands of Shetland and Orkney as shown through Sumburgh and Kirkwall combining for a total of 132,500 passengers in 2022.

1e – Maritime Connectivity

Below, Table 1e shows the current NorthLink Ferries service from Aberdeen to Orkney (Kirkwall) and Shetland (Lerwick) with a pre-covid (2019) and post-covid (2024) service provision highlighted. Figure 1e i shows the passenger, car and coach numbers across both crossings from 2019 until 2023. Finally under the Maritime Connectivity subheading is sea freight with figures on annual tonnage (Figure 1e ii) and value of fish landed (Figure 1e iii) provided.

	To Orkney		*To Shetland*	
	Journeys / week	***Journey time***	***Journeys / week***	***Journey time***
2019	4 summer / 3 winter	6 hours	7	12 ½ - 14 ½ Hours depending on whether it calls at Kirkwall
2024	4 summer / 3 winter	6 hours	7	12 ½ - 14 ½ Hours depending on whether it calls at Kirkwall

Table 1e: Aberdeen to Orkney & Aberdeen to Shetland Pre and Post Covid Schedule

Source: NorthLink Ferries website

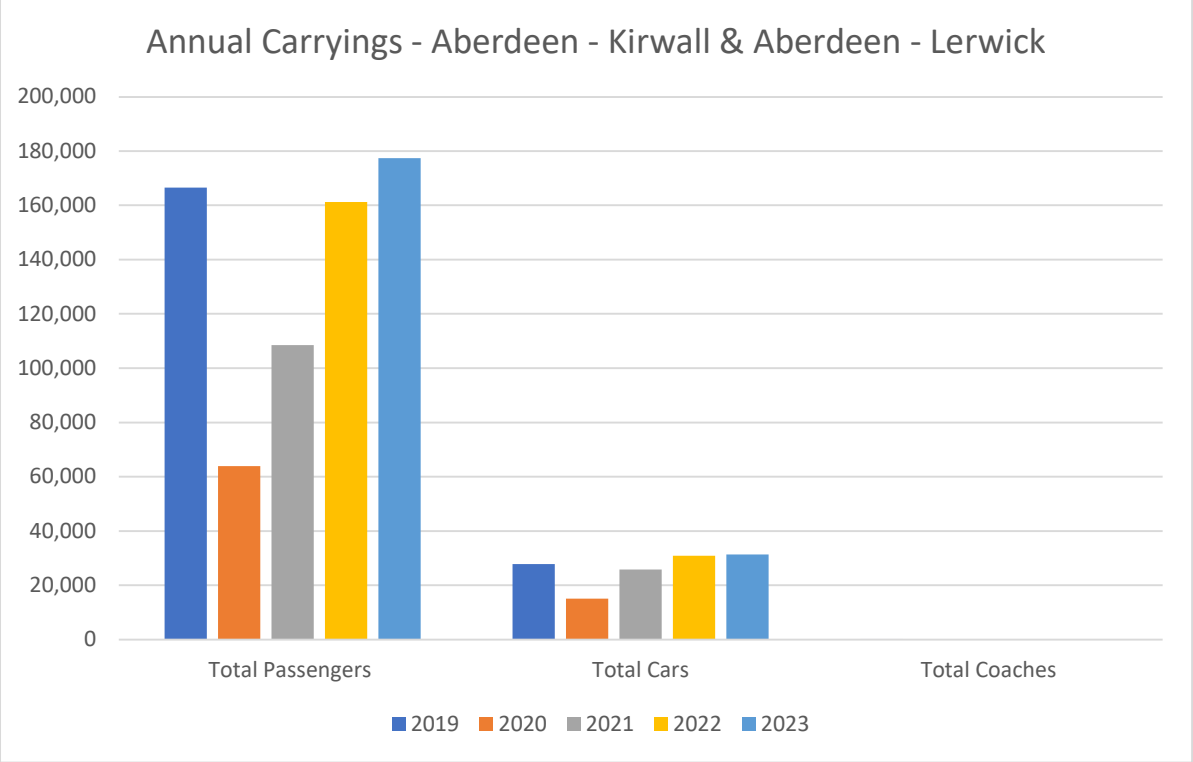
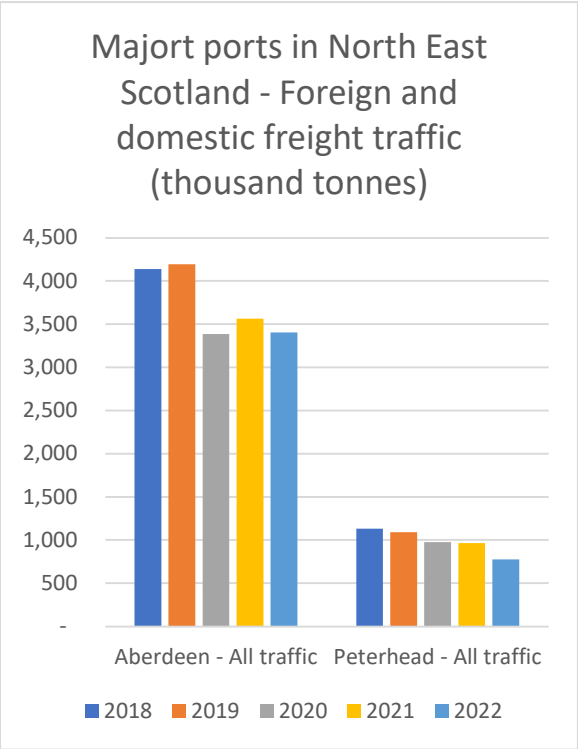


Figure 1e i: NorthLink Ferries Annual Carryings on Aberdeen crossings

Source: NorthLink Ferries website



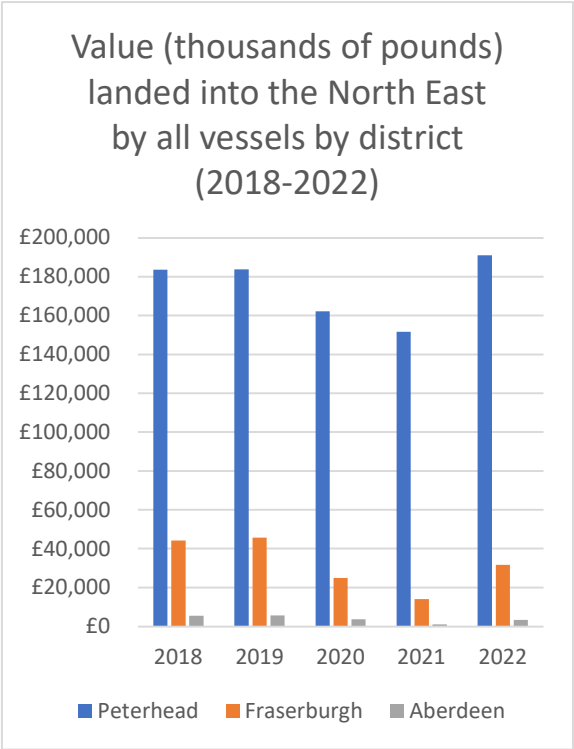


Figure 1e ii (Left): Foreign and domestic freight traffic into the major ports (Aberdeen and Peterhead)

Figure 1e iii (Right): Value of fish landed in the region (Peterhead, Fraserburgh & Aberdeen)

Source(s): Scottish Transport Statistics & Scottish Sea Fisheries Statistics

Aberdeen and the north east has a strong maritime history due the geography of the region. Aberdeen is a key transport hub for the movement of people (and goods) by sea to both Orkney and Shetland. The ferry service provided by NorthLink provides a key access to the mainland and vice versa. It is welcoming to see that in 2022 passenger numbers had nearly recovered to pre-pandemic levels of 2019; followed by a further increase in 2023 with annual passenger carrying above 2019 levels.

Figure 1e ii and Figure 1e iii show the value of sea freight to the north east economy. Figure 1e ii shows the tonnage into the two designated major ports (Aberdeen and Peterhead) in the region for all traffic (liquid bulk, dry bulk, container & roll on traffic and other general cargo). A key industry for the region is fishing and Figure 1e iii shows the value of fish landed into the north east from 2018-2022. What can be seen from this is that Peterhead is the largest fishing port in the region but also should be noted that Peterhead is the largest in Scotland both in value and total tonnage. Fraserburgh also has a significant role in the north east both through the value of fish being landed as seen in Figure 1e iii but also in other key opportunities such as offshore wind and vessel repair.

In order to continue to grow and be key leaders in Scotland, all three ports are progressing expansion opportunities. At Aberdeen, there was the official opening of the Aberdeen South Harbour in September 2023. Since opening they have been able to host large vessels such as cruise ships that have docked in the Harbour bringing tourists to the region.

At Peterhead significant investment has been made into the Port, working alongside partners Peterhead Port Authority are looking to increase their efforts regarding energy transition opportunities. Fraserburgh have significant plans for investment and expansion set out in their

Masterplan. This will bring strong opportunities to Fraserburgh Harbour, their customers and the town of Fraserburgh.

1f – Rail Connectivity

Indicator 1a provides an update on the current journey times from Aberdeen to Edinburgh, Glasgow and Inverness. To further understand the health of the rail network in the region, passenger numbers from the nine stations are set out in Table 1f (April 2022 - March 2023). It is also important to understand the current rail freight traffic that operates from the region and Figures 1f i and 1f ii provide the 2019 traffic from the busiest terminal in the region – Aberdeen Craiginches.

Number of passengers (entries and exits) per year through North East Stations – April 2022 – March 2023	
Aberdeen	*1,961,414*
Dyce	*260,000*
Stonehaven	*359,880*
Inverurie	*288,356*
Kintore	*85,348*
Laurencekirk	*60,670*
Insch	*52,348*
Huntly	*49,568*
Portlethen	*48,446*
TOTAL	***3,166,030***

Table 1f: North East Stations Passenger Numbers

Source: Office of Road and Rail – Passenger rail usage

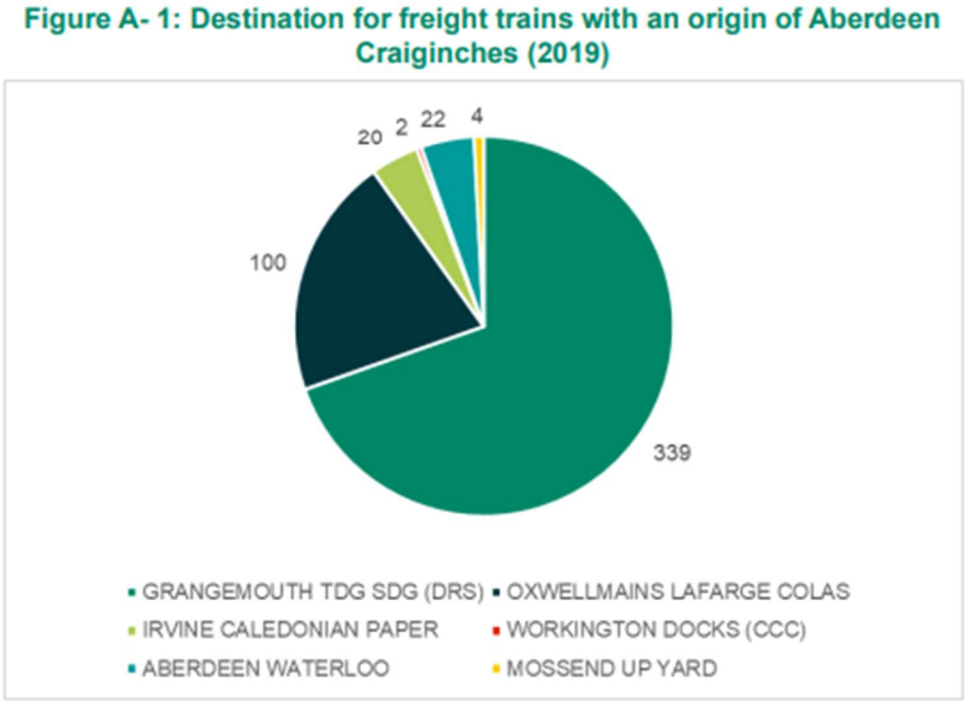


Figure 1f i: Railfreight trains, Destination from Aberdeen Craiginches

Source: Aberdeen (South) Rail Freight Terminals Study

Figure A- 2: Origins for freight trains with a destination of Aberdeen Craiginches (2019)

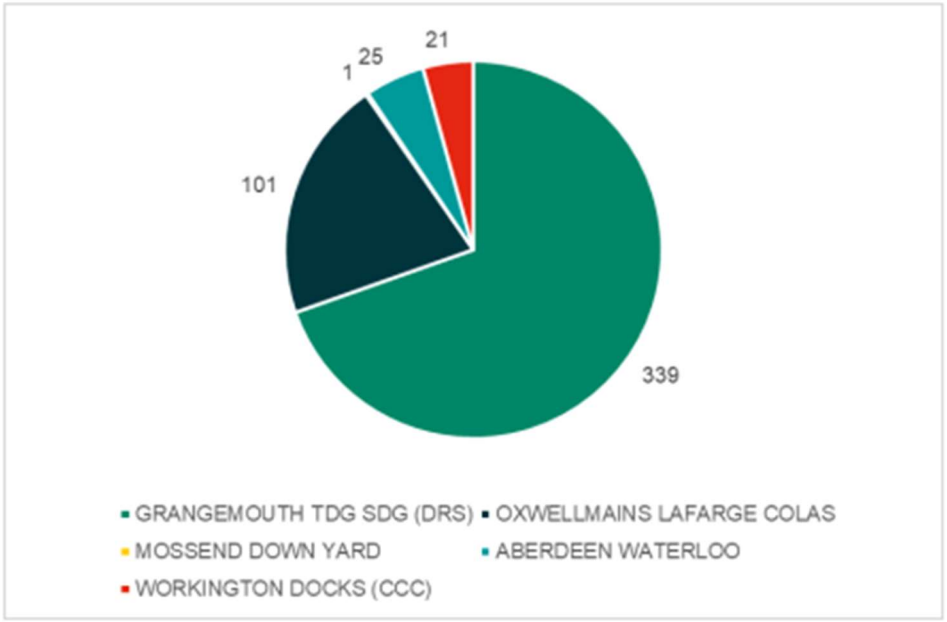


Figure 1f ii: Railfreight trains, Origin with a destination of Aberdeen Craiginches

Source: Aberdeen (South) Rail Freight Terminals Study

Table 1f shows that Aberdeen station is the most used station in the region making up 62% of passenger movement in the region. It is noted that Stonehaven and Inverurie are the busiest stations within Aberdeenshire making up 68.6% of the passenger movement from and to Aberdeenshire stations. Figures 1f i and 1f ii show both as a destination and as an origin, Grangemouth freight terminal near Falkirk is a vital link for the region making up a significant proportion of the movement of railfreight from and to Aberdeen Craiginches.

1g – Coach Connectivity

Table 1g below, shows some of the current long distance coach services that operate from Aberdeen to locations within Scotland and across the UK. There are currently two main coach operators that serve the region and these are Scottish Citylink and FlixBus; alongside the two main operators, Stagecoach operate the Aberdeen to Inverness service however tickets can be booked through Scottish Citylink for this service.

For the main journeys that have been identified, it is listed how many journeys occur per day with some variance within the data that can be attributed to service patterns differing from day to day e.g. more journeys on Fridays and Saturdays. Furthermore journey times to some of the destinations on route and the final destination have been provided.

Journey/Operator	Journeys per day	Journey Time
M92 – Aberdeen – Dundee – Edinburgh (Scottish Citylink)	18-25	To Dundee – 1hr 25 mins To Edinburgh – 3hrs 6 mins

M9 – Aberdeen – Dundee – Perth – Glasgow (Scottish Citylink)	26-27*	To Dundee – 1hr 25 mins To Perth – 2hrs 5 mins To Glasgow – 3hrs 15 mins
M96 – Aberdeen – Elgin – Inverness (Stagecoach)	6-8**	To Elgin – 2hrs 3 mins To Inverness – 3hrs 23 mins
Aberdeen to Edinburgh (FlixBus)	5	To Dundee – 1hr 20 mins To Edinburgh – 3hrs 25 mins
Aberdeen to Glasgow (FlixBus)	7	To Dundee – 1hr 20 mins To Perth – 2hrs To Stirling – 2hrs 40 mins To Glasgow – 3hrs 25 mins
Aberdeen to London (FlixBus)	1	To Edinburgh – 3hrs 20 mins To Newcastle – 6hrs 5 mins To London – 13hrs 15 mins

Table 1g: Main Coach Journeys Operating from Union Square Bus Station (Aberdeen)

Source(s): Scottish Citylink Winter Timetable, Stagecoach Timetable and FlixBus Timetables

*Some are express services not stopping in Dundee, some services also stop at Stirling and a handful stop at Forfar.

** The last two services per day terminate at Elgin.

It can be seen from Table 1g that there is a significant number of coaches that operate from Aberdeen to locations in Scotland and a FlixBus service that takes passengers from the region down to London via locations within the UK. The popularity of coach has grown in recent years due partly to those who are entitled to the Young Persons Free Travel scheme able to use coach services for free. Nestrans is committed to engaging with the coach sector to understand what is needed in order for this growth to continue.

2) Zero fatalities on the road network

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).

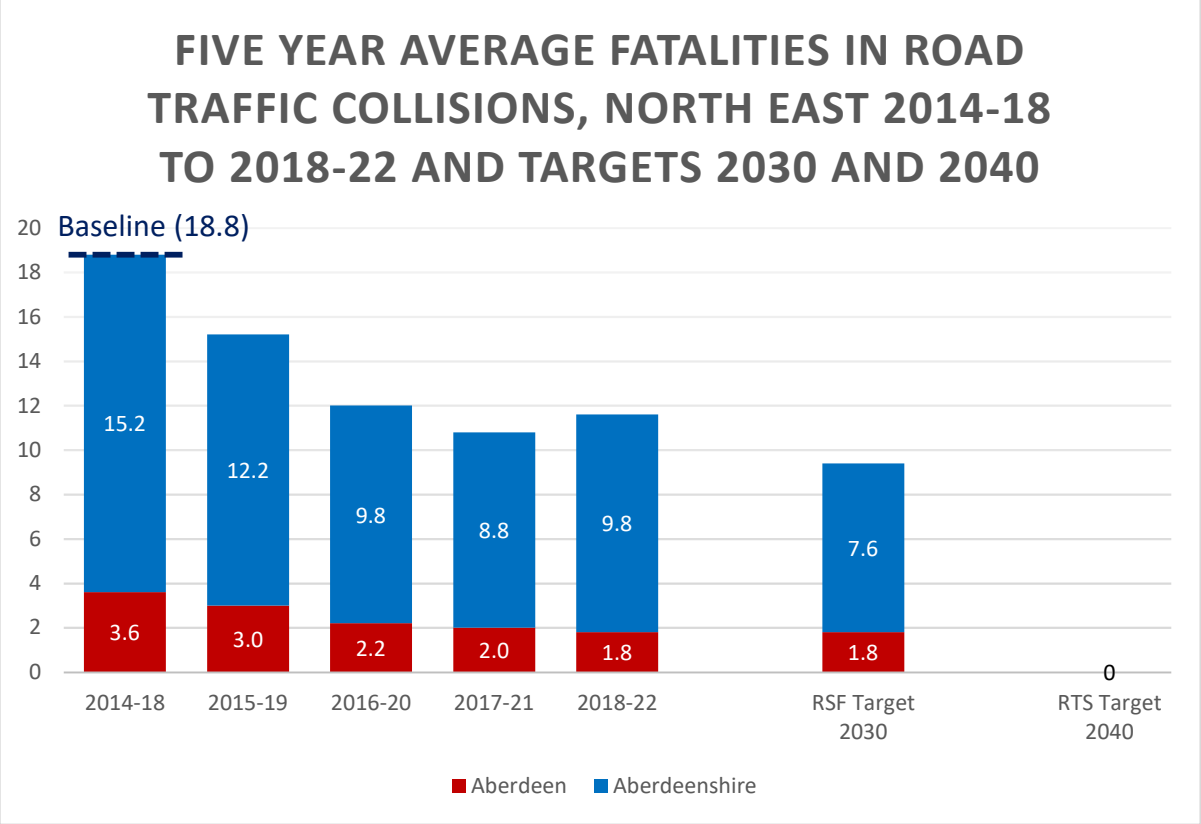


Figure 2a: Five-Year rolling average number of Fatalities, 2014-18 to 2018-22 and targets

Source(s): 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 Road Safety North East Scotland, a 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 outperform the national targets.

2024 Update: The five year average has seen a small increase in the average of overall number of fatalities in road traffic collisions within the region. This is due to an increase in fatalities that have occurred on the Aberdeenshire road network as within Aberdeen City the trend is still downward.

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).

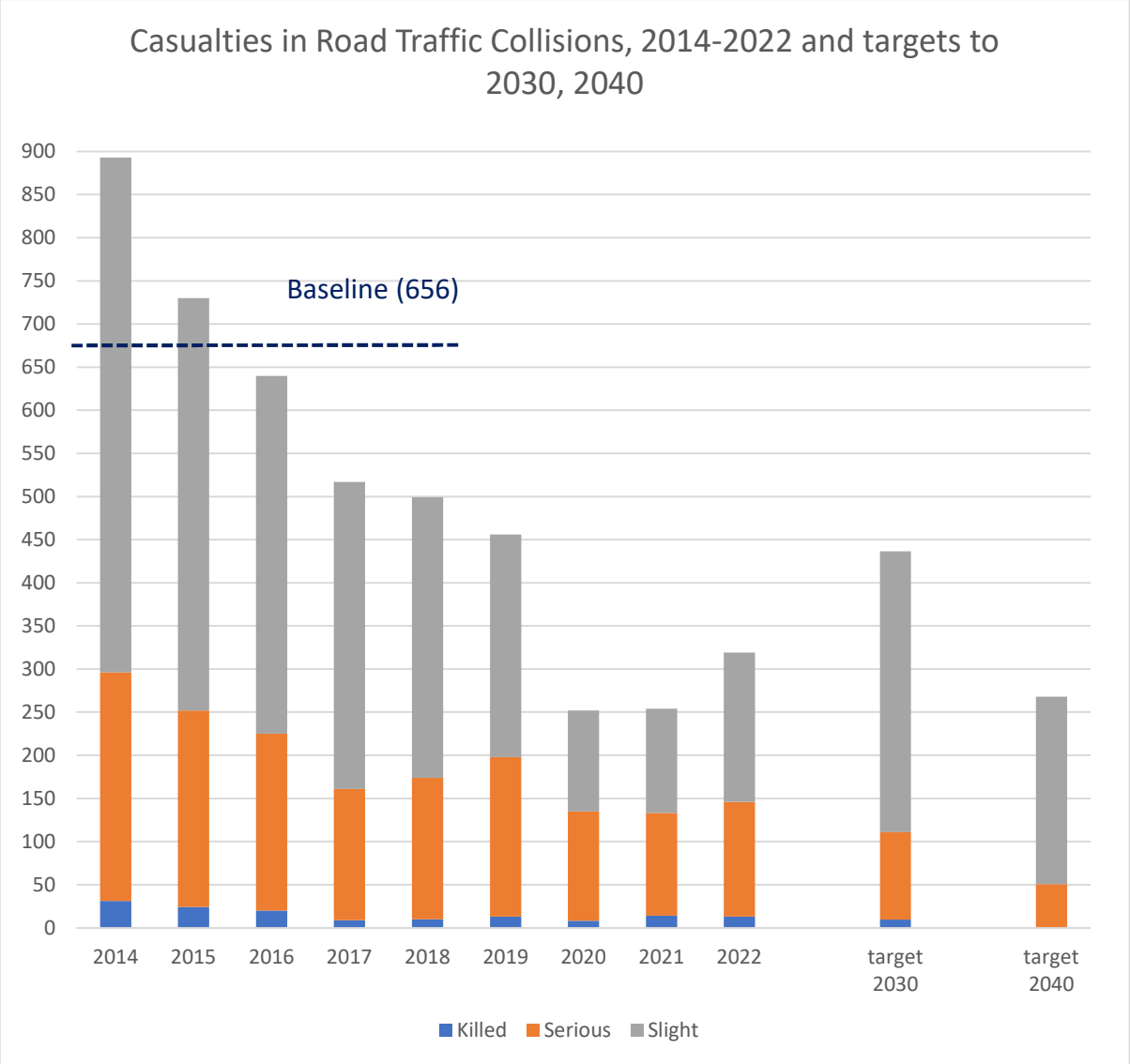


Figure 2b: Casualties in Road Traffic Collisions, 2014 to 2022 and targets.

Source(s): Reported Road Casualties Scotland and Aberdeen City/Aberdeenshire 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 annually over many years. 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 was almost 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 of all severities in the north east, have reduced from around 7.9% of the total number across Scotland in 2014 to 5.7% in 2019 to 5.0% in both 2020 and 2021, returning to 5.7% in 2022.

2024 Update: Casualty numbers in 2020 reduced significantly, partly as a result of reduced traffic during the pandemic. However, whilst it was heartening to note in the 2023 monitoring report that these lower rates had been maintained into 2021, sadly in 2022, casualty numbers grew by 25.6%. The total number of casualties at 319 is still less than half the baseline and below the original target set for 2030.

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).

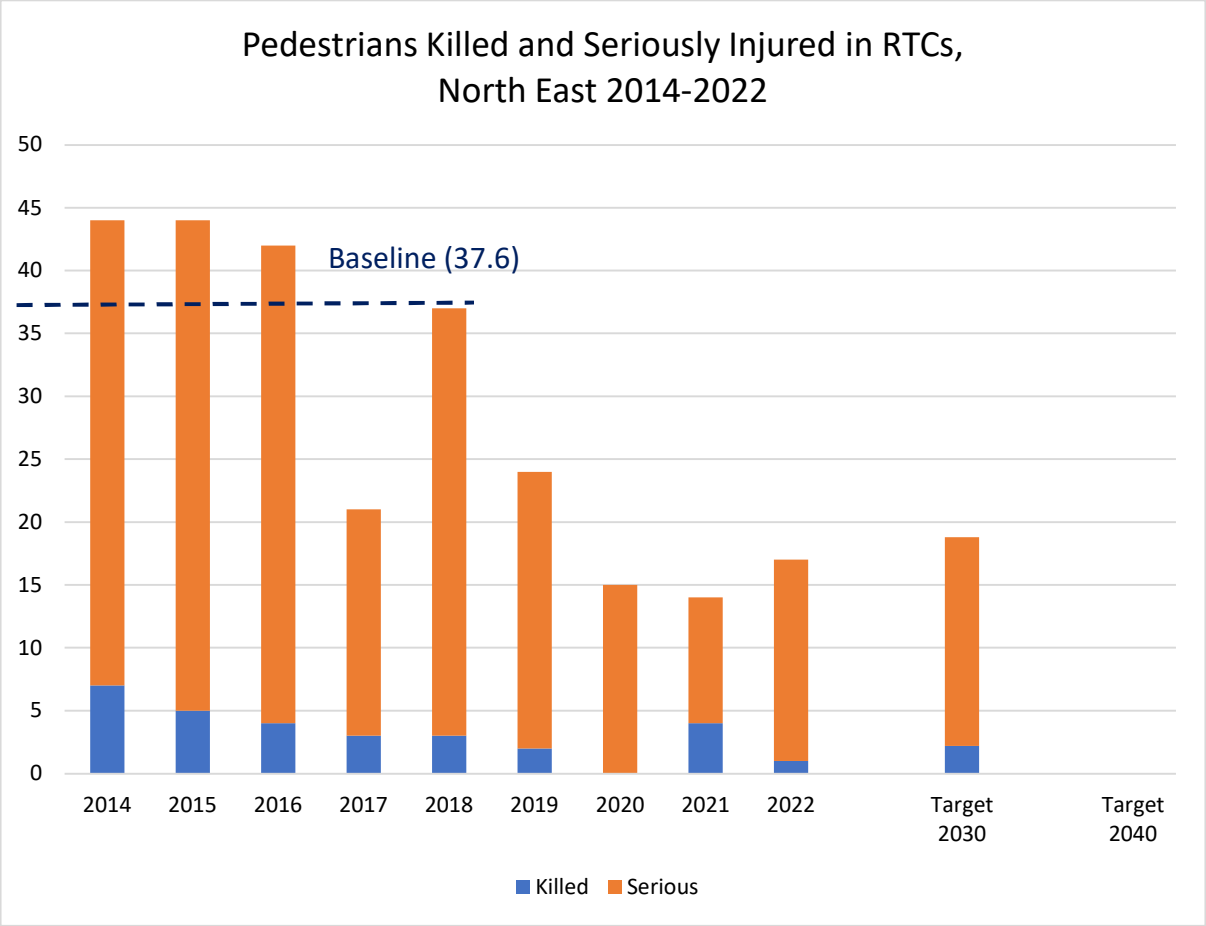


Figure 2c i: Pedestrian Casualties Killed and Seriously Injured, 2014 to 2022 and targets.

Source: Road Casualty Statistics Scotland, October 2023.

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 had been reducing in recent years and Figure 2c i shows that overall progress towards an aim of zero deaths is on track, whilst serious injuries are also reducing. 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.

2024 Update: Pedestrian casualty numbers reduced significantly in 2020, partly as a result of reduced traffic and a succession of lockdowns during the pandemic. However, in line with the return of more traffic to the region's roads there has sadly been an increase in number of pedestrians seriously injured in road traffic collisions. Whilst it is noted that there has been a reduction in pedestrians killed in road traffic collisions compared to 2021 and that total killed and seriously injured (one and 16 respectively in 2022) are down by 55% on the baseline and below the 2030 target.

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).

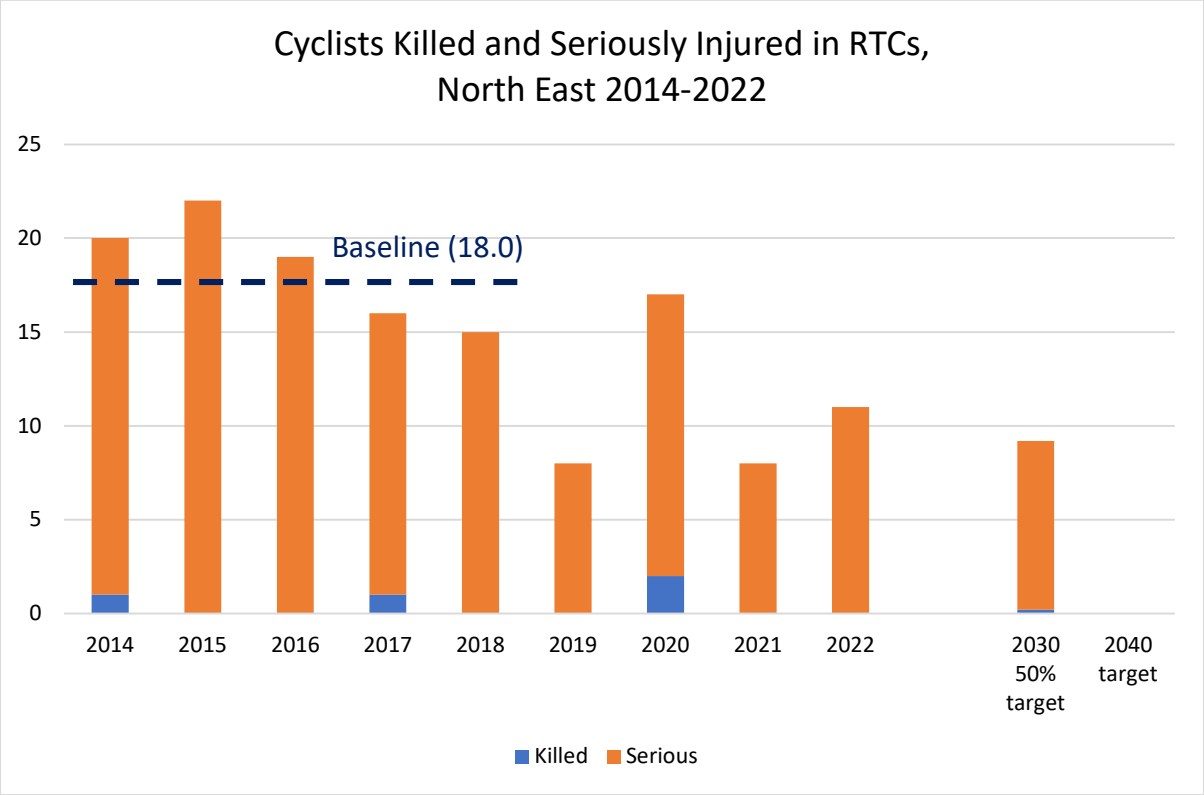


Figure 2c ii: Cyclist casualties killed and seriously injured, 2014 to 2022 and targets.

Source: Reported road collisions, vehicles and casualties tables for Great Britain – Department for Transport (2023)

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 people to cycle 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.

2024 Update: Unfortunately cycling casualty numbers grew in 2022 with 11 cyclist seriously injured compared to 2021 figures (37.5% increase). The five year average (2018-2022) presents a more positive outlook with figures still below or in line with the baseline. For 2018-2022 the number of cyclists seriously injured is an average of 11.4 per year (35% down on the baseline) whilst cyclists killed is the same as the 2014-18 baseline (0.4%).

3) Reducing Harmful Emissions

3a – Reducing concentrations of Nitrogen Dioxide

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.

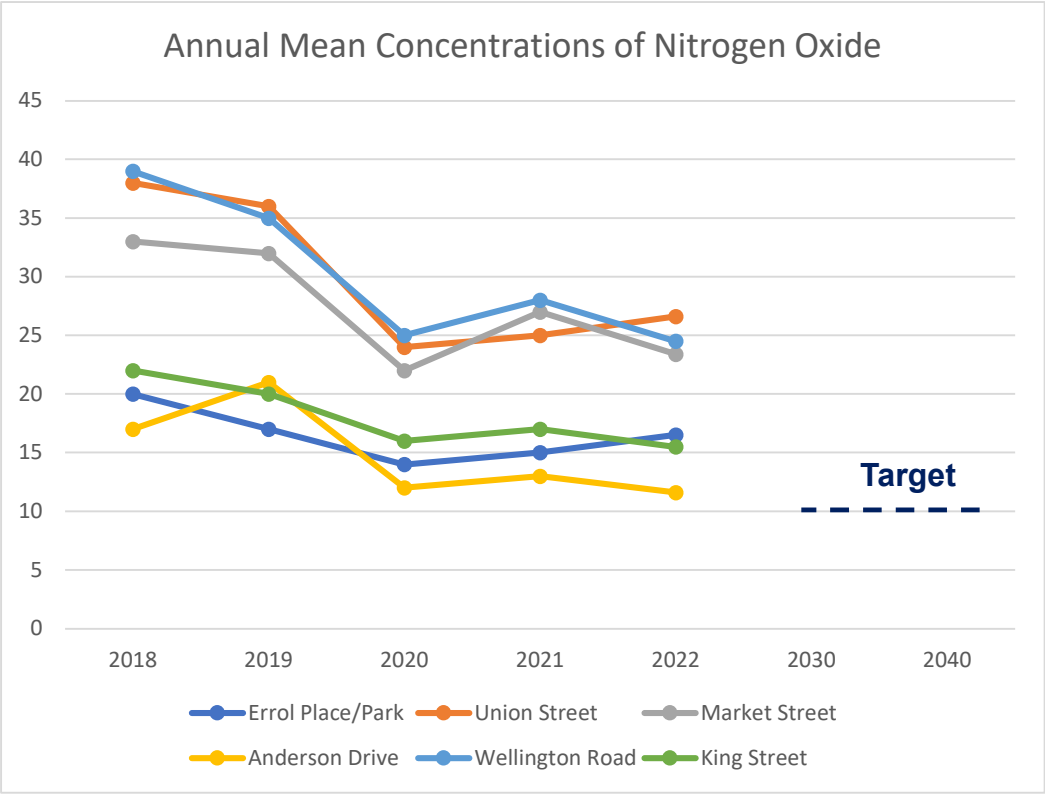


Figure 3a: Concentrations of Nitrogen Dioxide, 2018-2022 and targets.

Source(s): 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 (NO2) and Particulate Matter (PM10) 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 NO2 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/m3.

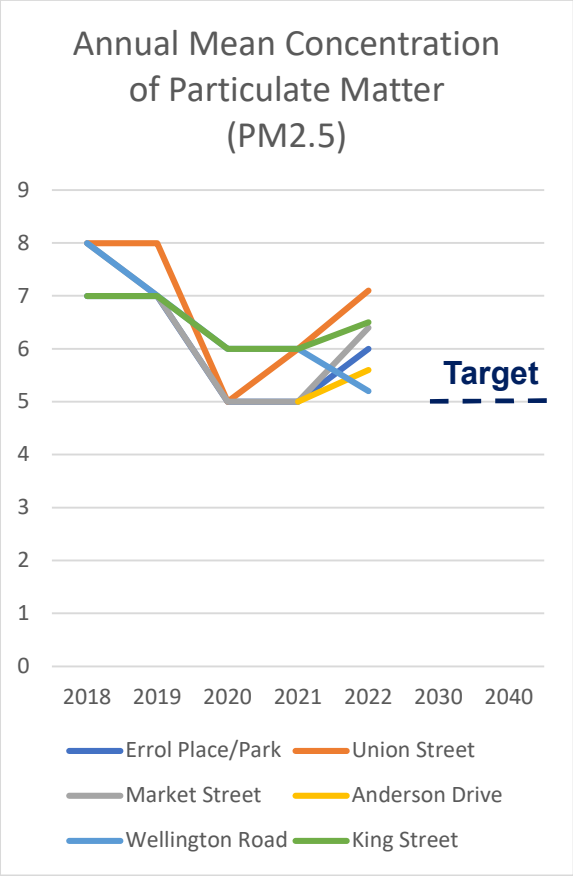
2024 Update: Levels of Nitrogen Dioxide at monitored sites reduced significantly in 2020, partly as a result of reduced traffic during the pandemic. However, in 2021, there was a small increase in NO2 levels, it is positive to see that this has not continued to rise in 2022 with four of the six locations seeing a reduction in NO2 levels. Average concentrations across the six sites in 2022 was 19.7µg/m3, a 27% improvement. It should be noted that in 2021 the Monitoring Station at Errol Place was changed to Errol Park.

3b – Reducing concentrations of 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.

2019 Baseline: At five Monitoring Stations within Aberdeen, PM2.5 levels averaged 7.2 microgrammes per cubic metre, and at six Monitoring Stations within Aberdeen, PM10 levels 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/m3 for PM2.5s and below 15 µg/m3 for PM10s, throughout the period of the RTS to 2040.



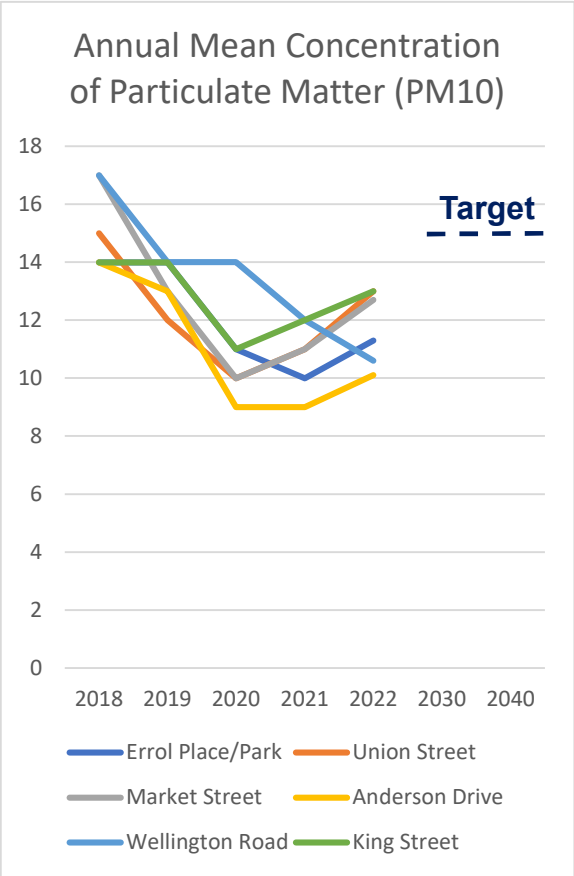


Figure 3b i (Left): Concentrations of PM2.5s 2018 to 2022 and targets

Figure 3b ii (Right): Concentration of PM10s, 2018 to 2022 and targets

Source(s): 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 (NO2) and Particulate Matter (PM10) exceeding acceptable levels. The Council also monitors levels of smaller particulates, PM2.5s. These pollutants are primarily resulting from traffic. Monitoring stations are in place and as can be seen from Figures 3b i and 3b ii, concentrations of PM2.5 and PM10 have generally been falling since 2018.

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 PM2.5 and less than 15 microgrammes per cubic metre for PM10s.

2024 Update: Levels of Particulates at monitored sites reduced in 2020, partly as a result of reduced traffic during the pandemic. However, in 2022, as in 2021 there has been a small increase in Particulate levels at five of the six locations with Wellington Road seeing a fall. Despite this increase at five of the six locations, levels remain below the 2019 baseline levels. In addition for PM10 all six locations are below the target level whilst for PM2.5 all are still above the target level. Furthermore, it should be noted that in 2021 Errol Place was changed to Errol Park.

4) Reducing carbon emissions to support Net Zero

4 – Moving towards Net Zero carbon emissions from surface transport

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

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

Target: To reduce emissions from surface transport by 75% by 2030 and by 100% by 2040 (229kT CO2e at 2030 and net zero by 2040).

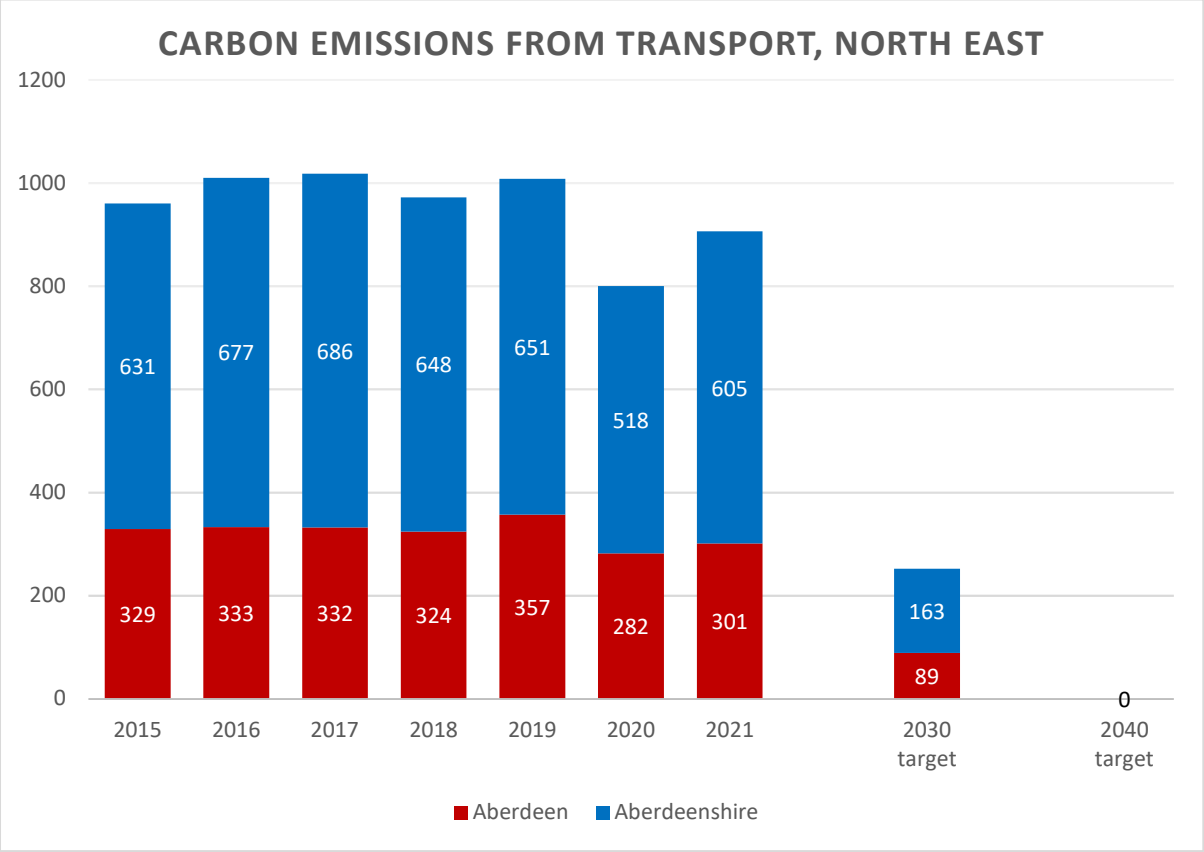


Figure 4: Carbon Emissions from Surface Transport, north east 2015 to 2021 and targets.

Source: Department for Energy Security & Net Zero – UK local authority and regional estimates of carbon dioxide emissions, June 2023.

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 Scotland's 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.

2024 Update: According to the Department for Energy Security & Net Zero (UK local authority and regional estimates of carbon dioxide emissions) in 2021, emissions from surface transport in Aberdeen were 300.5kT CO2 (26.6% of all emissions in the City) and in Aberdeenshire 605.4kT CO2 (33.5% of all emissions in the Shire).

Carbon emissions from surface transport increased in 2021 compared to the previous year, partly as a result of the increase in traffic. They are however down on 2019, although it is worth noting that the figures are adjusted annually and in the latest release the 2019 figures have changed impacting on the agreed baseline, seeing an increase from 914 to 1,007 kilotonnes.

4a – Number of Electric Vehicles in North East Scotland

Through the Department for Transport, data can be gathered on the number of battery electric vehicles (BEVs) registered by local authority area. Figure 4a below shows the total registered cars and light goods vehicles currently in the north east of Scotland across the two local authority areas.

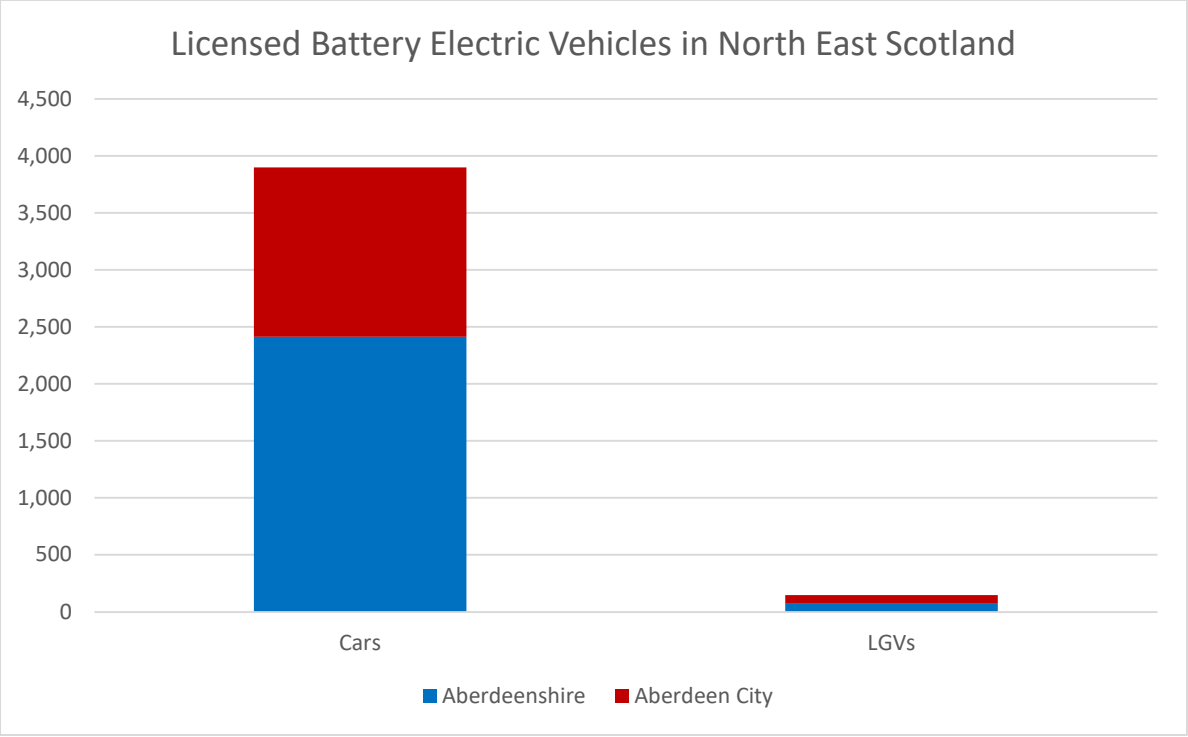


Figure 4a: Battery Electric Vehicles in North East Scotland, 2023

Source: Department for Transport – Vehicle licensing statistics data tables (Dec 2023)

Figure 4a shows that there are over 4,000 BEVs licensed in the north east of Scotland with 3,897 cars and 148 LGVs as of December 2023. It is worth noting within these figures there is a higher proportion of cars in Aberdeenshire making up 61.9% of the region's electric cars.

4b – Electric Vehicle Charging Points in North East Scotland

Figure 4b i below shows the change in the total number of electric vehicle chargers in the north east by local authority area from Oct-22 to Apr-24. It is worth noting that this is the area the chargers are located in and not solely those charging points owned by the local authority. Figure 4b ii shows on this same timeline (Oct-22 to Apr-24) the sessions that have been registered within each local authority area.

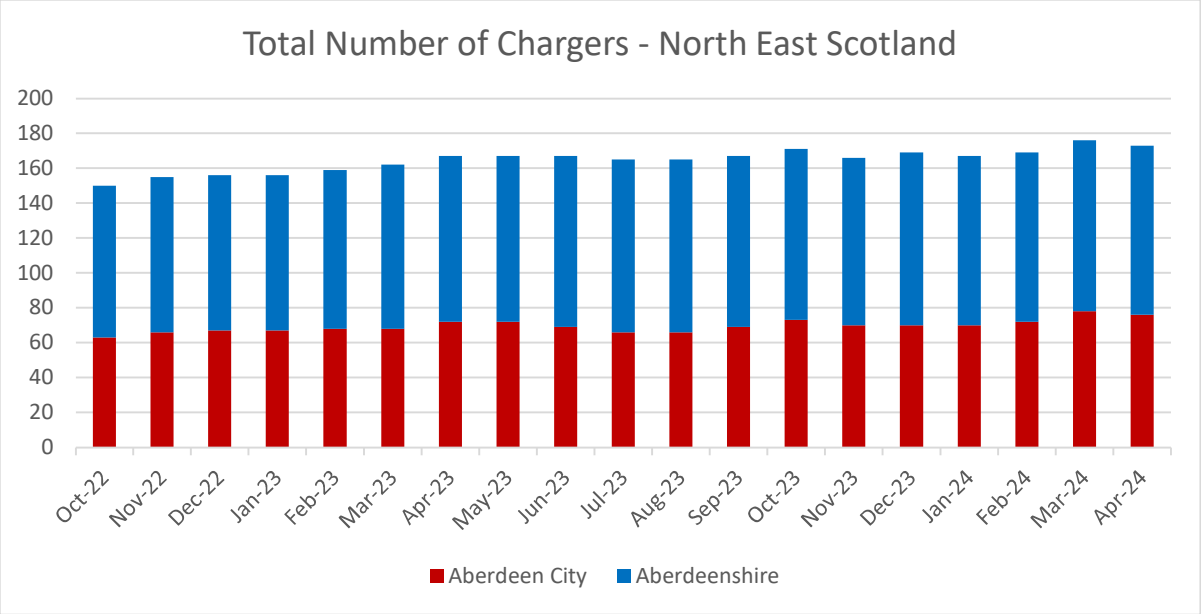


Figure 4b i: Electric Vehicle Chargers in N E Scotland (Oct-22 to Apr-24)

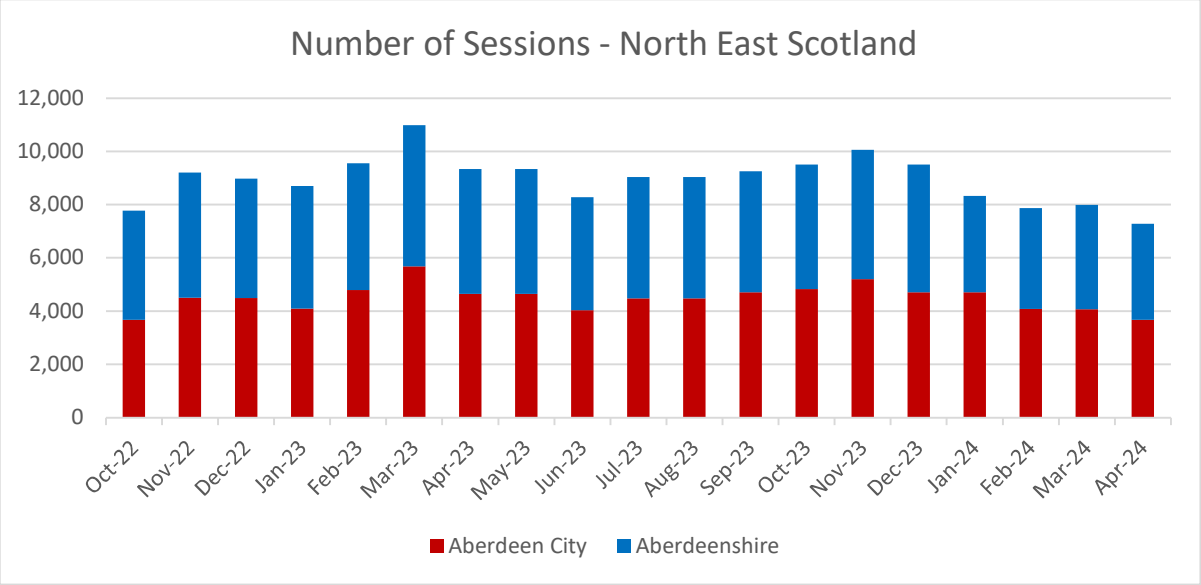


Figure 4b ii: Number of EV charging Sessions in N E Scotland (Oct-22 to Apr-24)

Source: ChargePlace Scotland – Network Performance Data

It is pleasing to see that there has been a growth in the last 18 months in electric charger provision in both local authority areas with Aberdeen City seeing an 18 month growth of 13 chargers, whilst Aberdeenshire saw an 18 month growth of 10 chargers. It should be noted that this is figures for just ChargePlace Scotland chargers and therefore the growth of chargers installed in this time may be greater than this (e.g more home instalments). Figure 4b i is supported by Figure 4b ii which shows the number of sessions hosted by the chargers in both local authority areas. As can be seen, there has been a fall in the number of sessions with the latest figure (Apr-24) being the lowest number of sessions in the months covered. It will be relevant to monitor this to understand if this is an issue of lack of confidence in the infrastructure provided or if users are finding that the number of home chargers and the range of vehicles is improving, meaning charging away from home is not required as often.

4c – Zero Emission Buses in North East Scotland

It is important that the bus fleet continues to improve its emissions performance and this is measured through the number of zero emission vehicles used by bus operators on the region's network. A key action of the Regional Transport Strategy is to work with bus operators to decarbonise the bus fleet and reduce emissions harmful to health by 2035. Below is the percentage of fleet operated by zero emission vehicles (electric and hydrogen) by the two large bus operators, First Aberdeen and Stagecoach in 2023.

	Electric	Hydrogen	Total
First Aberdeen	25.8%	15.5%	41.3%
Stagecoach	19.9%	N/A	19.9%

Table 4c: Percentage of Electric and Hydrogen Vehicles – First Aberdeen and Stagecoach, 2023

Source: Requested Data from First Aberdeen and Stagecoach

Over the last few years, with support from Scottish Government grants, both bus operators have invested in their fleet, introducing more zero emission vehicles to the region. During 2023, First introduced 24 new electric buses to their fleet increasing the number of electric buses operating in the region with Stagecoach also operating a strong electric bus fleet as shown in Table 4c. This adds to the zero emission vehicles in the region with First operating some of the only hydrogen double-decker buses in the UK.

Some of this investment has been possible due to the Scottish Government's Zero Emission Bus challenge fund (ScotZeb). May 2023 saw the launch of phase 2 of ScotZeb and the operators are keeping Nestrans up to date on their progress with this fund through the North East Bus Alliance. The north east faces a challenge in increasing zero emission buses in the region given the long distances that some bus journeys can be, but as can be seen from Table 4c, good progress is being made.

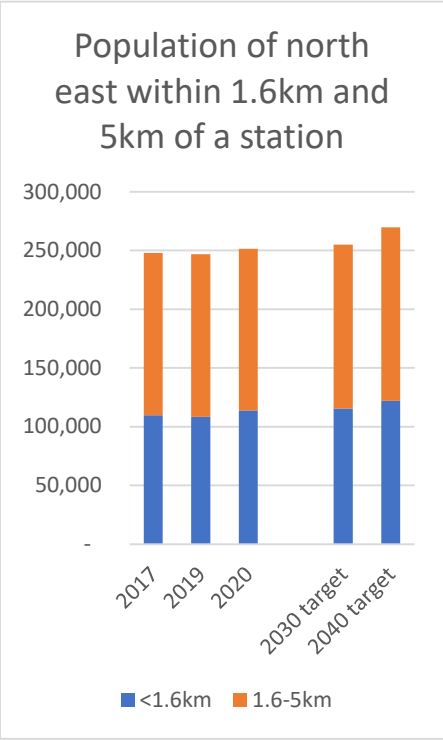
5) Accessibility

5a i) – Public Transport – proximity of a station

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

2019 Baseline: 50.4% of the population lived 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.



Population within 1.6km and 5km of a station

	<1.6km	1.6-5km	Total Population	Per centage within 5km
2017	109,679	138,066	490,600	50.5%
2019	108,404	138,337	489,880	50.4%
2020	113,794	137,607	489,880	51.3%
2030 target				52%
2040 target				55%

Figure 5a i: Population with 1.6km and 5km of a railway station, 2017 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.

With the opening of Kintore Station in October 2020, the population within 1.6 kilometres of a station 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).

2024 Update: There is no updated small area population estimates available for either Aberdeen City or Aberdeenshire meaning it was not possible to update this indicator.

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.

2019 Baseline: 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 2023	**Opened**	**Accessibility**
Huntly		Partially accessible
Insch		No step-free access to west-bound platform
Inverurie		Partially accessible
Kintore	Oct 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

Figure 5a ii: Number of railway stations and levels of accessibility, 2023.

Source: 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%.

2024 Update: Nestrans await confirmation of projects to be supported by the Accessible Stations Fund from DfT, having completed the Accessibility to Insch Station Study.

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

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

2019 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.

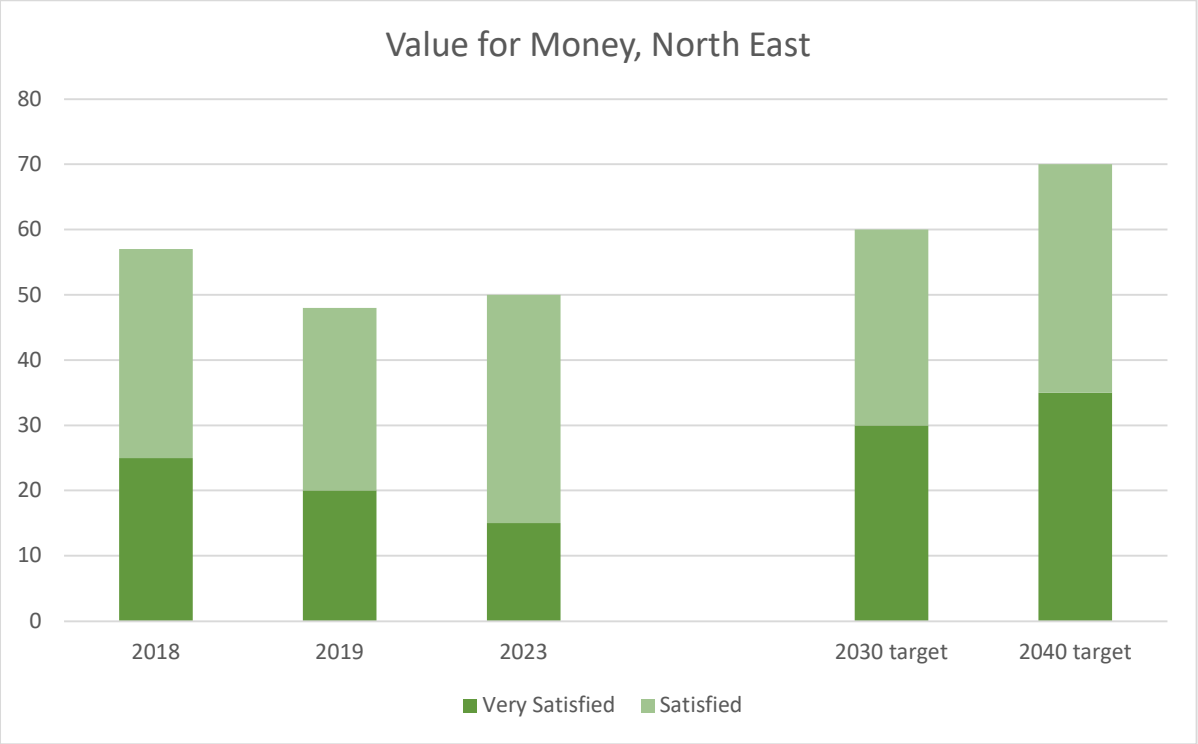


Figure 5b i: Bus Users' satisfaction with Value for Money, 2018 to 2023 and targets.

Source(s): Transport Focus, Bus Passenger Satisfaction surveys and Nestrans BPSS 2023

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 report intends to track passengers' perception of Value for Money for their bus services.

Nestrans previously contributed to Transport Focus' annual Bus Passenger Satisfaction Survey but for 2023 it was decided that our own collection would be commissioned. The satisfaction amongst existing fare paying passengers was 50% expressing satisfaction. The North East Bus Alliance will continue to survey fare-paying passengers' satisfaction and will aim to increase the levels of satisfaction to 70% by 2040.

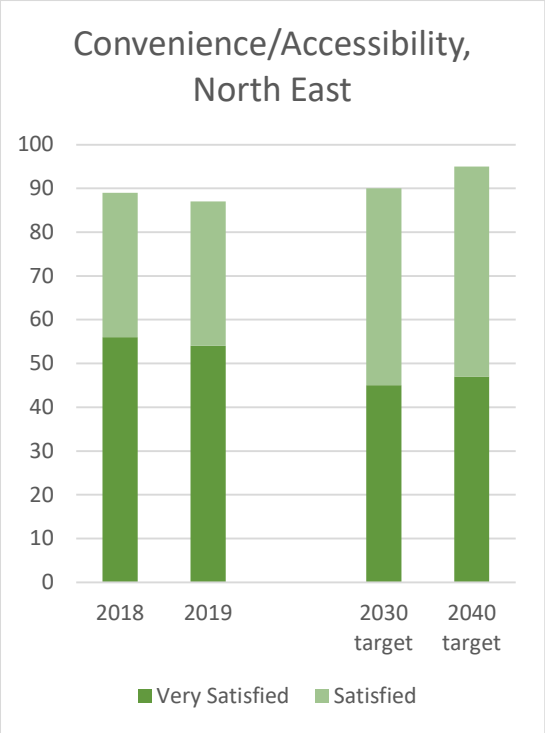
2024 Update: In 2023 the decision was taken that Nestrans would conduct our own Bus Passenger Satisfaction Survey and the report produced was report to Nestrans Board in February 2024 with the results used to inform this indicator noting levels of satisfaction in 2023 are similar to the baseline.

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.

2019 Baseline: 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



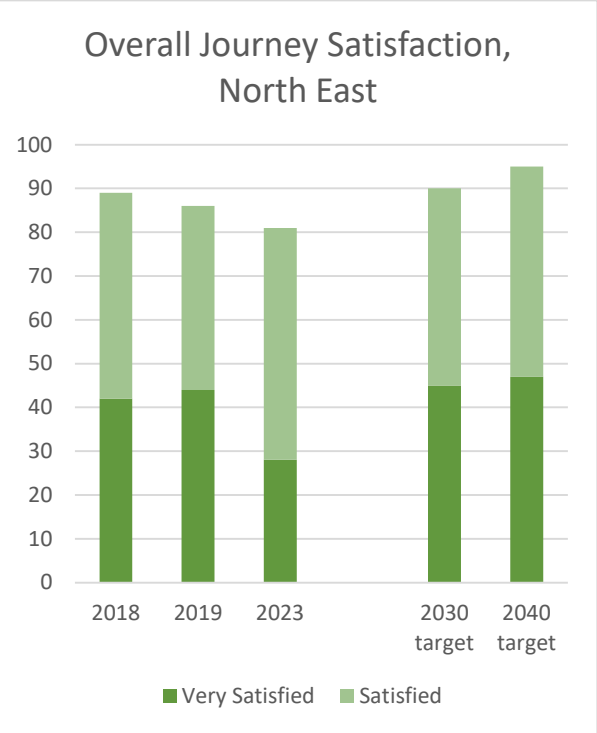


Figure 5b ii (Left): Bus users' satisfaction with Convenience and Accessibility of bus services, 2018 to 2019 and targets.

Figure 5b ii (Right): Bus users' Overall satisfaction with bus services, 2018 to 2023 and targets.

Source(s): Transport Focus, Bus Passenger Satisfaction surveys & Nestrans BPSS 2023.

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 previously contributed to Transport Focus' annual Bus Passenger Satisfaction Survey, however the decision was made in 2023 to complete our own Bus Passenger Satisfaction Survey and in doing so we decided against asking a single question on convenience and accessibility which had been the case previously. it was decided that overall satisfaction would be used for monitoring of this indicator going forward taking cognisance of all of the issues of satisfaction that impact on the convenience and accessibility of services.

2024 Update: The 2019 baseline for convenience and accessibility as stated above is 87% satisfaction, with overall satisfaction a similar figure at 86%. In 2023 overall satisfaction had gone down with 81% very satisfied or satisfied.

5c – Satisfaction with Bus Boarding

As part of accessibility to bus services, boarding the bus is a key part of an accessible bus service. Figure 5c i below shows the satisfaction with bus boarding from the last two Transport Focus surveys (2018 & 2019), alongside data from the Nestrans Bus Passenger Satisfaction Survey conducted in 2023. As part of the 2023 survey, data was also collected on the reasons respondents struggled to board the bus.

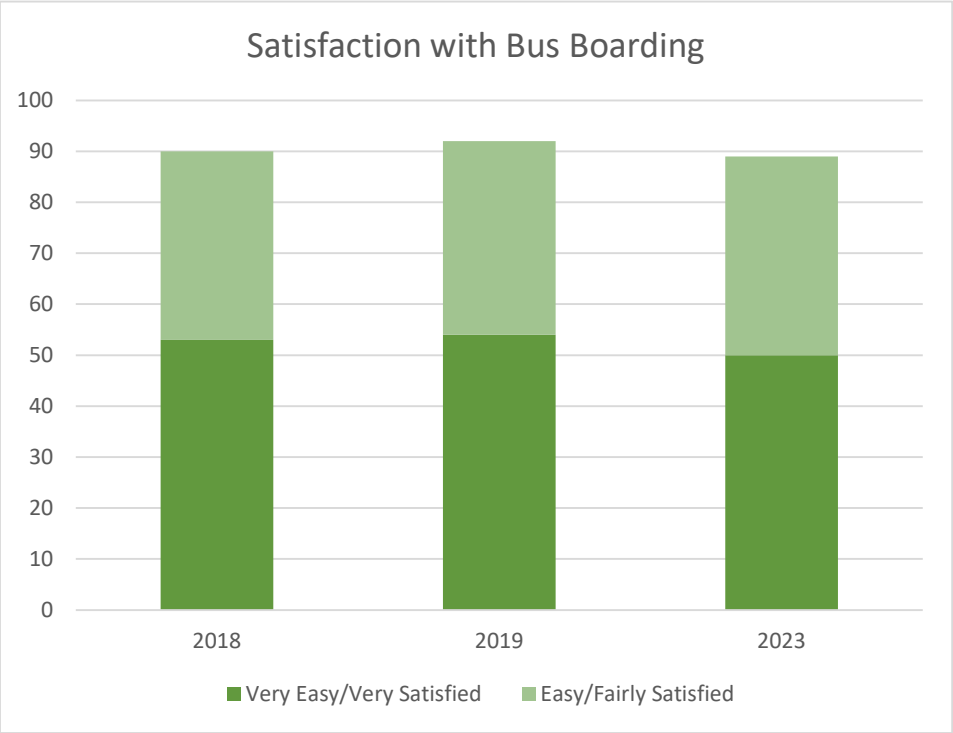


Figure 5c i: Bus Passenger Satisfaction with Bus Boarding in North East Scotland

Source(s): Transport Focus, Bus Passenger Satisfaction surveys & Nestrans BPSS 2023.

Aberdeenshire	Aberdeen City
The vehicle (n=13)	The vehicle (n=8)
The pavement (n=2)	The pavement (n=0)
How closely the driver pulled up (n=0)	How closely the driver pulled up (n=5)
Parked cars (n=0)	Parked cars (n=2)
Other obstructions (such as rubbish bins or street furniture) (n=3)	Other obstructions (such as rubbish bins or street furniture) (n=0)

Base: Aberdeen City (n = 15), Aberdeenshire (n = 18)
Q.15a What made it difficult to board the bus?

Figure 5c ii: Reasons Respondents Struggled to Board the Bus

Source: Nestrans BPSS 2023

Figure 5c i shows that there is a high level of satisfaction with bus boarding in the region with nearly 90% satisfied with their experience in the last three bus satisfaction surveys. This means that roughly 10% of users were neither satisfied/dissatisfied, dissatisfied or very dissatisfied. It is therefore useful to have Figure 5c ii which has grouped qualitative responses into categories. It is noted in both local authority areas the vehicles seem to be one of the biggest barriers and this is something that has been highlighted through the North East Bus Alliance with the two large bus operators in the region; First Aberdeen and Stagecoach.

5d – Bus Stop Infrastructure

Table 5d below shows the current bus stop infrastructure within the Aberdeen City and Aberdeenshire local authority areas. The below is key data provided by both Passenger Transport Units across eight measures from the number of bus stops in each area, what is available at the bus stop upon arrival and how accessible the stop is for boarding the bus.

2023/24	Aberdeen City	Aberdeenshire
Total Number of Bus Stops	1,286	1,496
Number of Stops with a Timetable Case Installed	97%	87%
Percentage of Stops that have a Bus Shelter	49%	55%
Percentage of Shelters with Lighting Installed	66%	79%
Percentage of Stops with Raised Kerbs	44%	66%
Percentage of Stops with Raised Kerbs that are Protected	83%	46%
Bus Stops with Real Time Passenger Information Screens	6%	4%
Bus Stops with Digital E-Paper Displays	0.4%	2.6%

Table 5d: Bus Stops and Bus Stop Infrastructure/Provision

Source: PTUs – Aberdeen City Council & Aberdeenshire Council

Building on Figure 5c ii above, the data set out in Table 5d is useful to further understand the reasons behind why people may struggle to board the bus. Alongside this, the data above helps in understanding the general accessibility of bus stops, with the above also influencing the safety of bus stops in the region. A key ambition set out in the vision for Aberdeen Rapid Transit is to make buses more accessible by making the bus journey process from arriving at the bus stop to departing the bus, safe and accessible for all.

5e – Parking & Blue Badges

A key priority of the Regional Transport Strategy is to have a transport system that is accessible to all. Therefore, it is important that those who require a Blue Badge are able to access them and use them. Figure 5e below shows the number of Blue Badges issued in the North East across the two local authorities from 2019 to 2023.

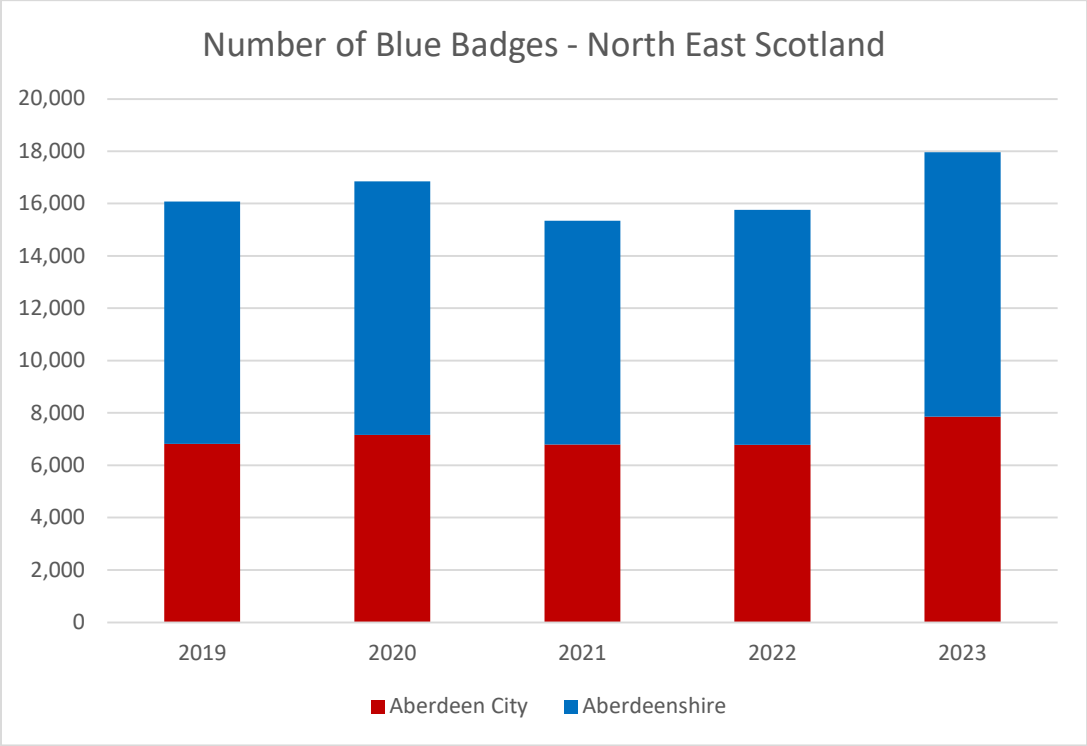


Figure 5e: Blue Badges issued in North East Scotland (2019-2023)

Source: Scottish Transport Statistics

At end March 2023, there were 17,957 Blue badges on issue across the north east, 7,862 for Aberdeen residents and 10,095 for Aberdeenshire. This represents 6.3% of all Blue badges issued in Scotland and has increased from 16,072 in 2019, an increase of around 11.7% over four years.

It can be seen from Figure 5e that number of blue badges in the North East of Scotland has remained fairly consistent across the five year period shown. It is however noted that 2023 saw the largest number of blue badges issued in this period across each of the two local authority areas. As the population of the region ages, it will be relevant to monitor blue badges and will include this metric as part of the three-yearly evaluation report (this report).

5f – Taxis & Private Hire Cars

Table 5f below sets out the provision of taxi vehicles, private hire cars, taxi/private hire licences and wheelchair accessible vehicles (taxis & private hire cars). This data was collected from Scottish Transport Statistics 2022.

	Taxi Vehicles	Private hire cars	TOTAL	Taxi and Private Hire driver licenses	Wheelchair accessible taxis/private hire	% Wheelchair accessible
Aberdeen City	593	225	818	1,056	335	41.0%
Aberdeenshire	493	391	884	602	72	8.1%
North East	1,086	616	1,702	1,658	407	23.9%
SCOTLAND	9,271	12,438	20,709	29,640	4,757	23.0%
NE as % of Scotland	11.7%	5.0%	8.2%	5.6%	8.6%	

Table 5f: Taxi & Private Hire Cars in North East Scotland – 2022

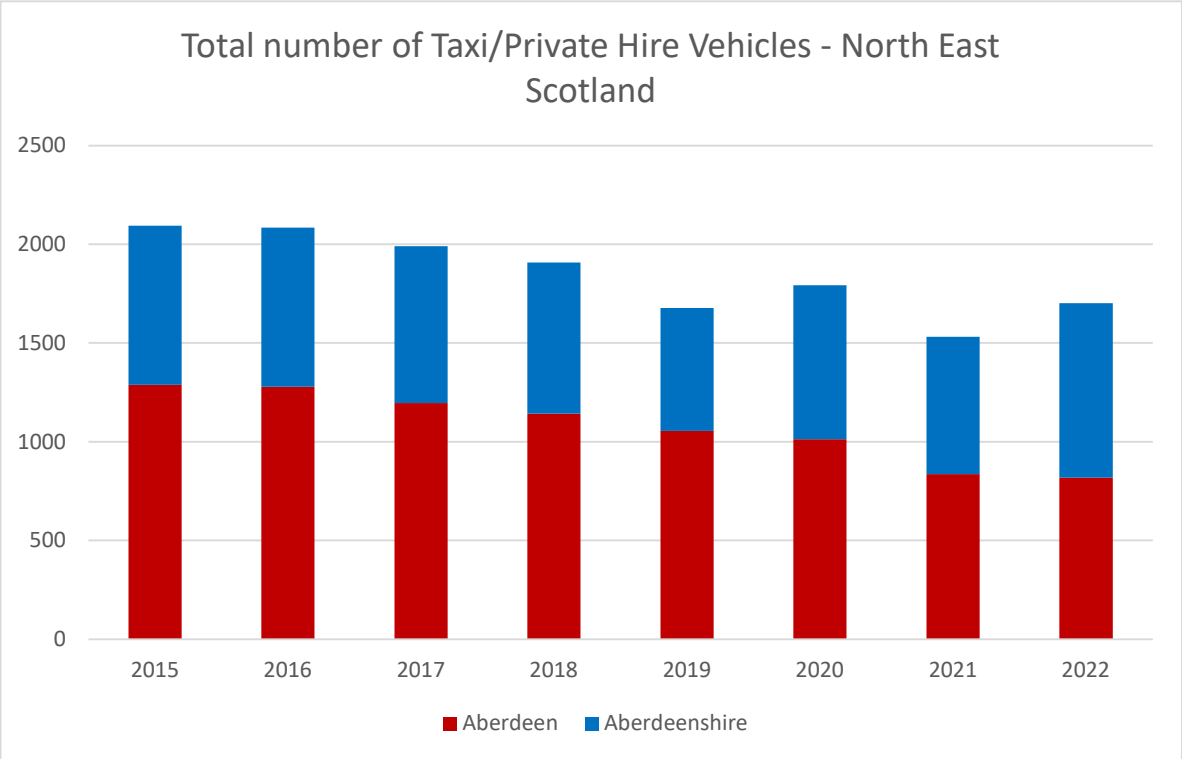


Figure 5f: Taxi & Private Hire Cars in North East Scotland – 2015 to 2022

Source(s): Scottish Transport Statistics 2016-2022

In 2022, there were 1,086 taxis and 616 private hire vehicles available across the north east. In Aberdeen, 41% of vehicles were wheelchair accessible, whereas this proportion is just 8% in Aberdeenshire. Figure 5f shows the current trends in both local authority areas from 2015 to 2022. It can be seen from this graph that in Aberdeen City there has been a steady reduction in the number of taxi/private hire vehicles licensed. In Aberdeenshire there is no clear trend over this same period although 2022 did record the highest number of vehicles across the 8-year period.

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

6a i) – Reducing overall demand for travel

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

2019 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.

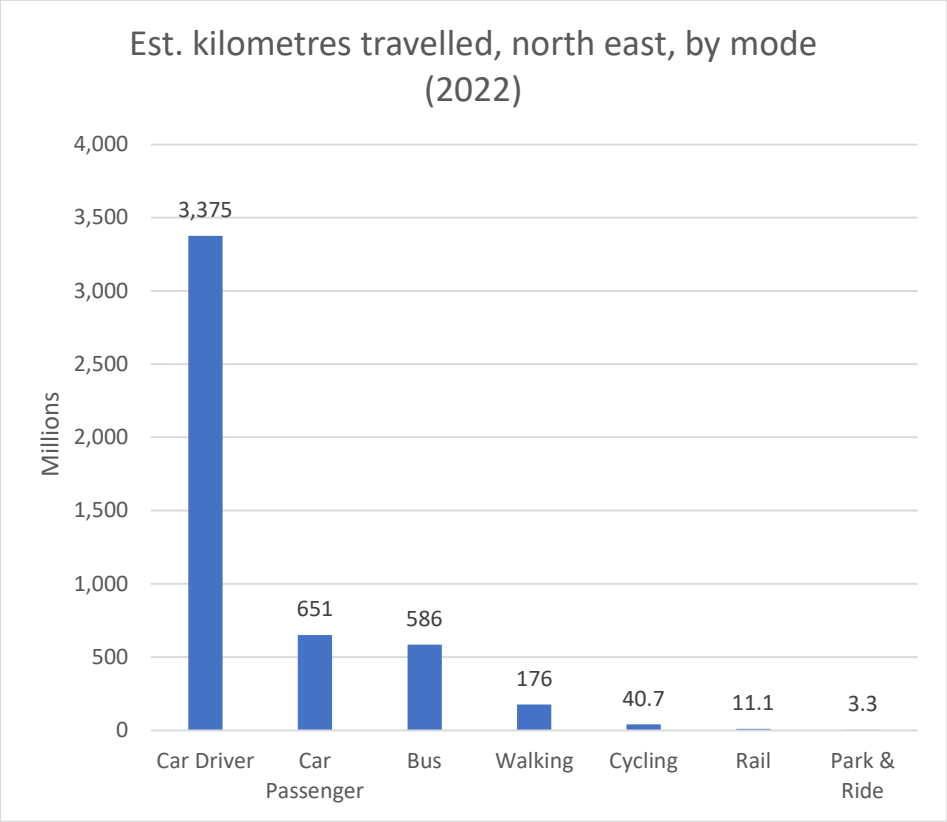


Figure 6a i: Estimates of kilometres travelled by mode, north east, 2022

Source: Estimates based on Scottish Transport Statistics, DfT traffic counts and Nestrans Monitoring Reports (Note that rail data is for 2021/22 and therefore is impacted more by the pandemic restrictions than the other modes).

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. In 2022 there was a close return to pre-pandemic levels with an estimated 4.8 billion kilometres travelled within the north east.

Of this, an estimated 3.4 billion km is by car driver, and 651 million km by passengers. Bus accounts for an estimated 586 million km, rail 11.1 million km and Park & Ride around 3.3 million kilometres. Walking is estimated to total some 176 million kilometres and cycling around 40.7 million km.

In 2022, a further 1.14 billion kilometres are estimated to be travelled by goods vehicles within the region - 228 million km (or 20%) by Heavy Goods Vehicles and 916 million km (80%) by vans or Light Goods Vehicles.

Travel to and from the north east in 2022 was estimated to account for 4 billion km; 1.6 billion km through Aberdeen International Airport, 58 million km by ferries, 164 million km by rail (noting that this is 2021/22 data) and 2.2 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.

2024 Update: Transport Scotland have published updated data for 2022 allowing Nestrans to estimate kilometres travelled by mode in the region for 2022. As stated 2022 travel has not returned to pre-pandemic levels. Predominantly this is driven by the significant difference in the kilometres travelled by car driver. Whilst this remains as the most used mode in the region, it is estimated that 344 million fewer kilometres were travelled compared to 2019. Compared to this difference other modes are much closer to the 2019 estimates, such as car passenger which was 623 in 2019 compared to 651 for 2022. Furthermore, both walking and cycling are above 2019 estimates.

6a ii) – Influencing proportions of travel choice by mode

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

2019 Baseline: 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).

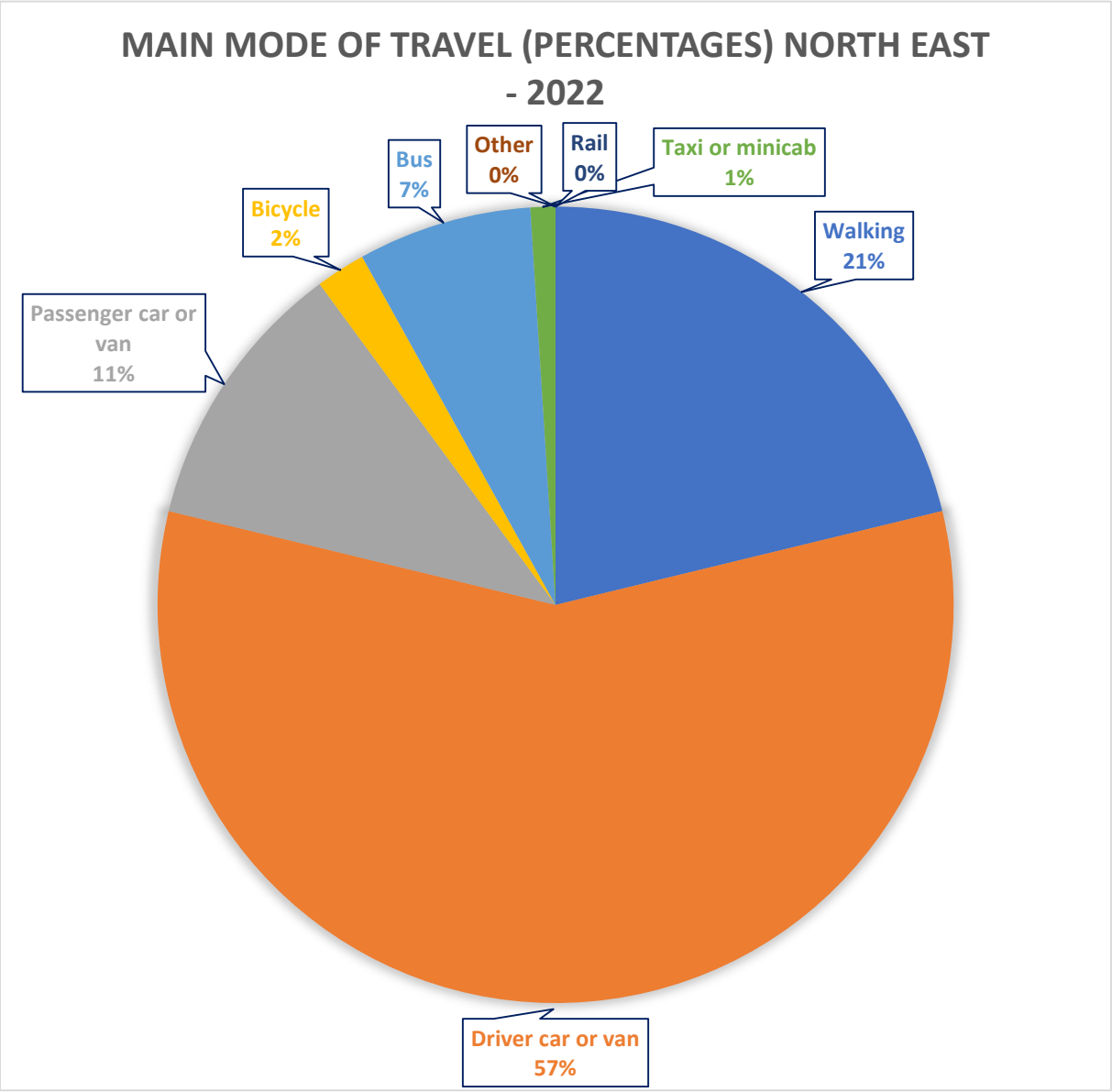


Figure 6a ii: Main Mode of Travel, North East 2022

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.

2024 Update: Since the monitoring report was completed for 2023, there has been publication of Scottish Household Survey data for 2021 and 2022. Figure 6a ii shows the results for 2022, in which 57% regard driving as their main mode which is a decrease from 2019 figures. Regarding walking, there has been a minor increase with 21% stating that walking is their main mode (compared to 19% in 2019). It is worth noting that in 2021 amidst the pandemic, 26% stated walking was their main mode.

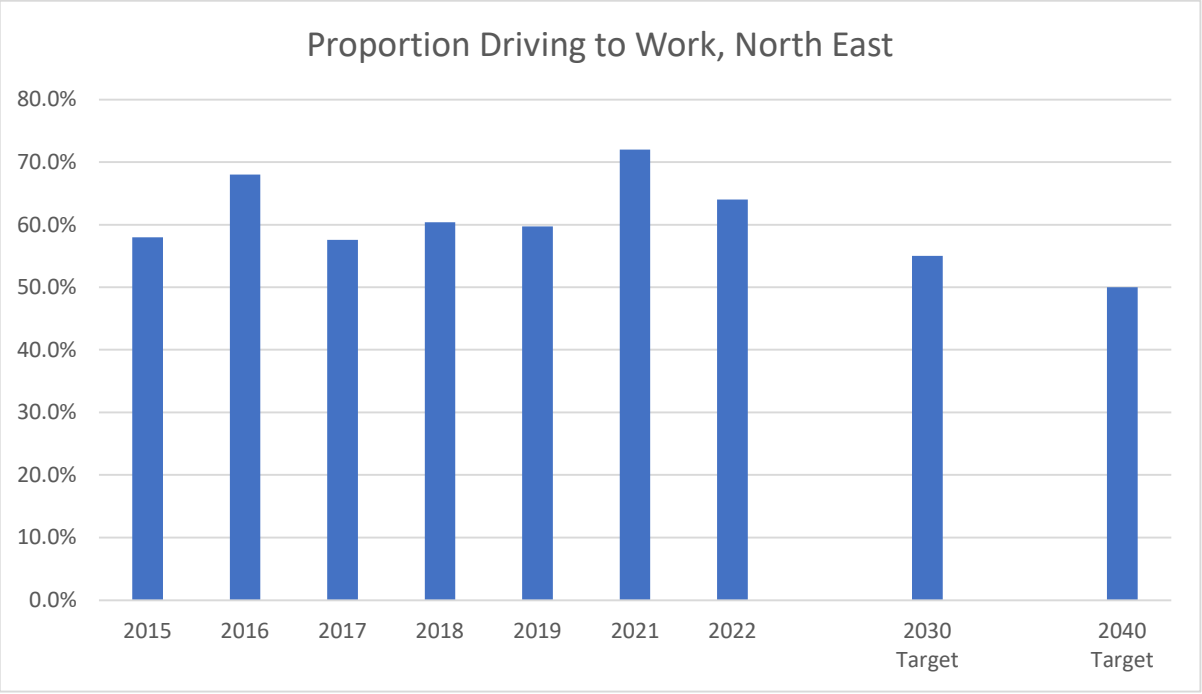


Figure 6a iii: Proportion citing their Main Mode of Travel as Driving, 2015 to 2022 and targets.

Source: Scottish Household Survey Travel Diaries

2024 Update: Whilst there has been a reduction in car as the main mode for all purposes, when travelling to work car reliance grew significantly in 2021 to 72%, which was likely driven by personal safety concerns and the need to socially distance during the pandemic. In 2022 there was a reduction to 64%, although this is still above the last pre-covid survey in 2019.

6b – Lessening dependence on car travel

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

2019 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).

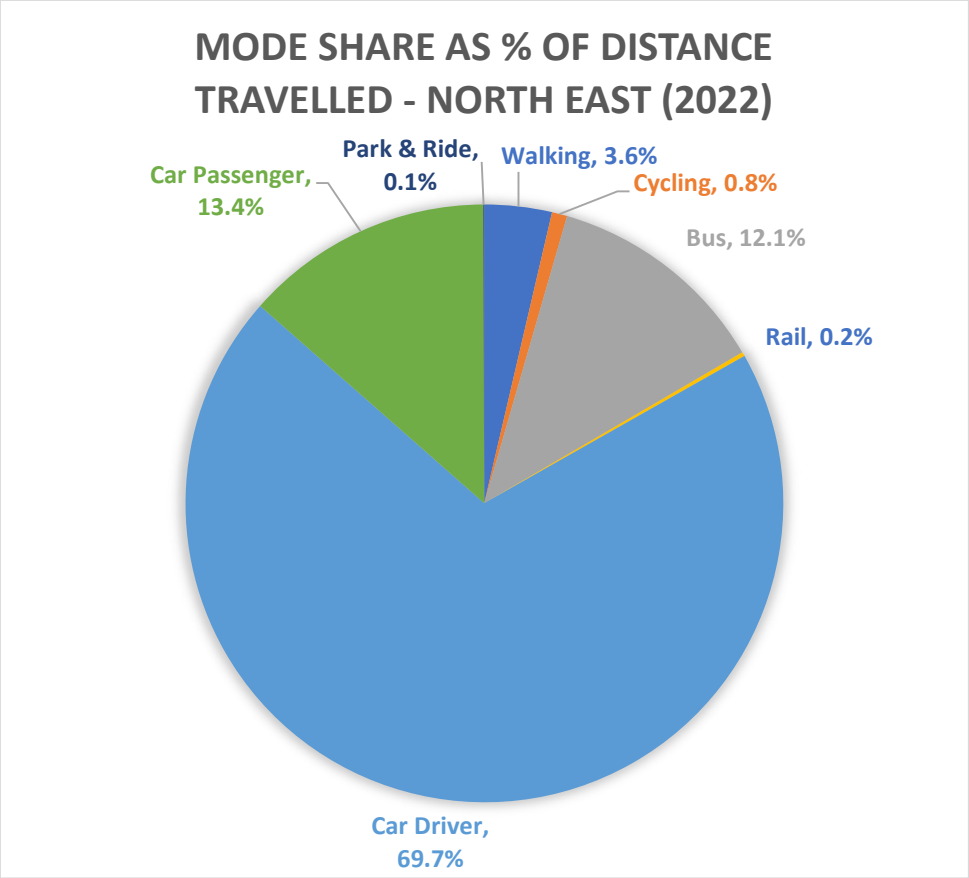


Figure 6b: Estimate of proportions mode share by distance, north east, 2022.

Source(s): 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 Regional Transport Strategy seeks to encourage short trips to be made by such options. The Strategy also seeks 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 also seeks 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.

2024 Update: Figure 6b estimates show that compared to both the 2019 baseline and 2020 data, car driving is down from 74.5% in 2020 to 69.7% in 2022. Furthermore, bus travel has seen a return to the 2019 baseline (an estimated 12% of distance travelled).

6c – Reducing the amount of car travel across the region

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

2019 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.

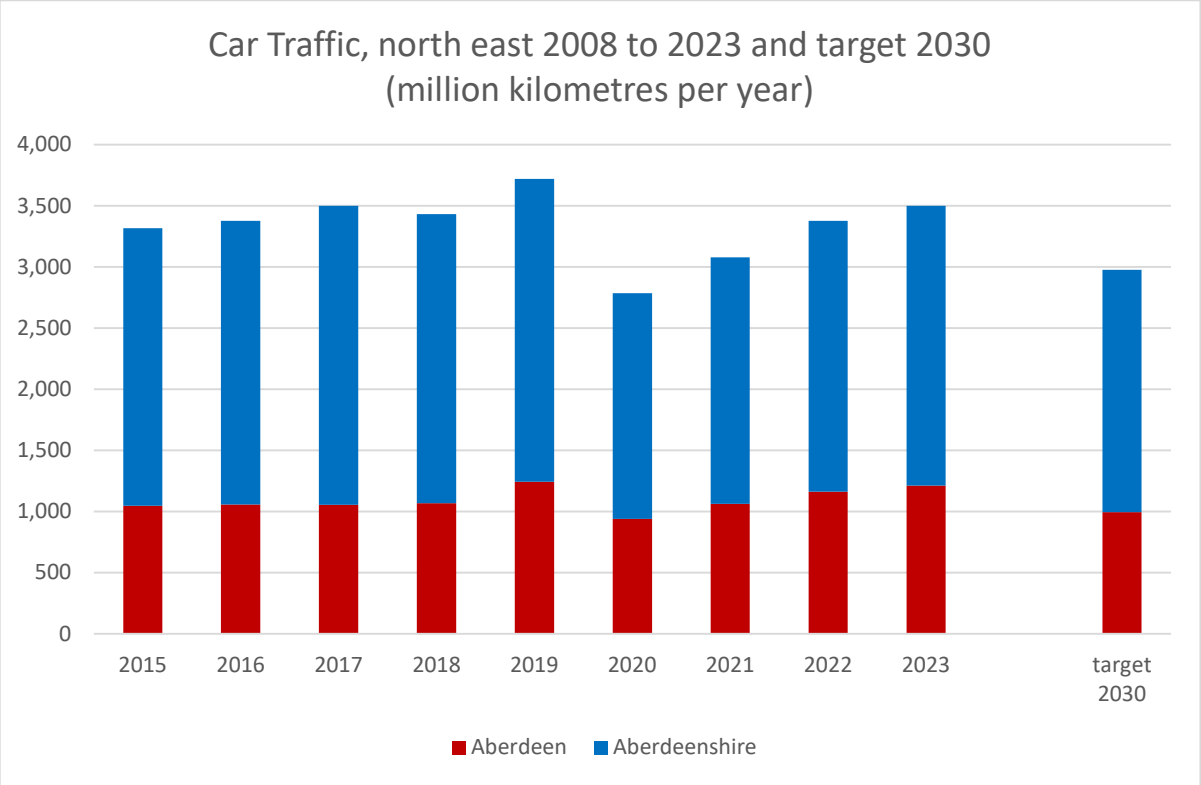


Figure 6c: Car kilometres travelled, north east 2015 to 2023 and target

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

At 2019, total 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 were travelled. Cars were estimated to contribute around 75.7% of all traffic in the north east, constituting approximately 3.72 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.

2024 Update: As a result of the covid pandemic and resulting travel restrictions for much of the year, car traffic in the north east declined during 2020. This was followed by a marginal

increase in 2021 and in 2022. This trend continued for 2023 with a further increase with car traffic levels to 1.211 billion kilometres in Aberdeen and 2.288 billion kilometres in Aberdeenshire (a total of 3.499 bn km across the north east). This is 5.9% below the 2019 baseline but represents a 3.7% increase compared to 2022.

6d – Walking, Wheeling & Cycling in North East Scotland

Walking, wheeling and cycling monitoring is important for the region as more investment is brought forward towards active travel improvements. Figure 6d shows monthly cycling counts (Oct-21 to Sep-23) from the 32 counters in Aberdeen City and the 43 counters in Aberdeenshire.

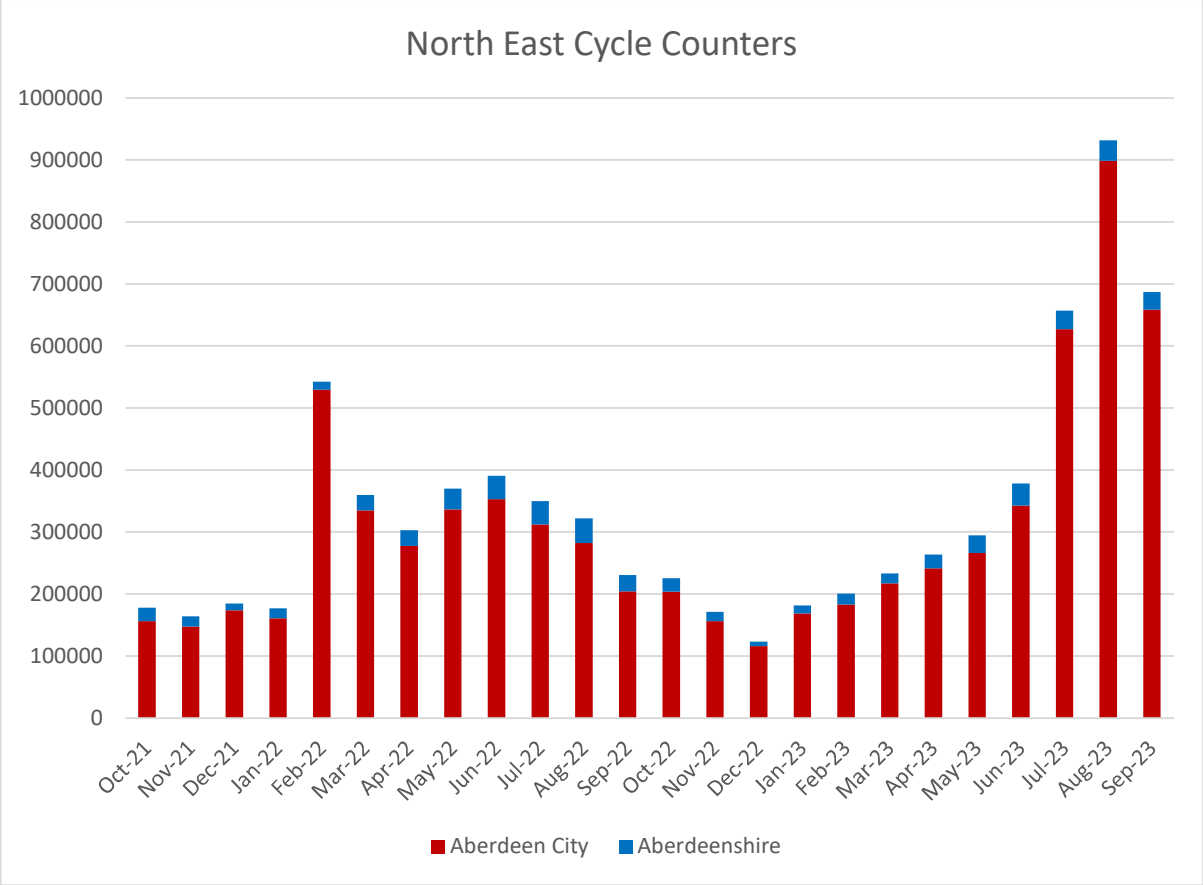


Figure 6d: Monthly Cyclists Totals – North East (Oct-21 to Sep-23)

Source: Open Data Portal, Cycling Scotland; https://usmart.io/org/cyclingscotland/

Figures 6d shows the number of cyclists picked up by the counters in Aberdeen City and Aberdeenshire from Oct-21 to Sep-23. It is worth noting that this does not account for all cycling in the region, but does provide a snapshot to help analyse trends.

6e – Bus Patronage in North East Scotland

Figure 6e below shows an estimated trend in bus patronage in the region from 2019-2023. The estimated trend includes the patronage of both local authority services and the services of the two large operators in the region; First Aberdeen and Stagecoach.

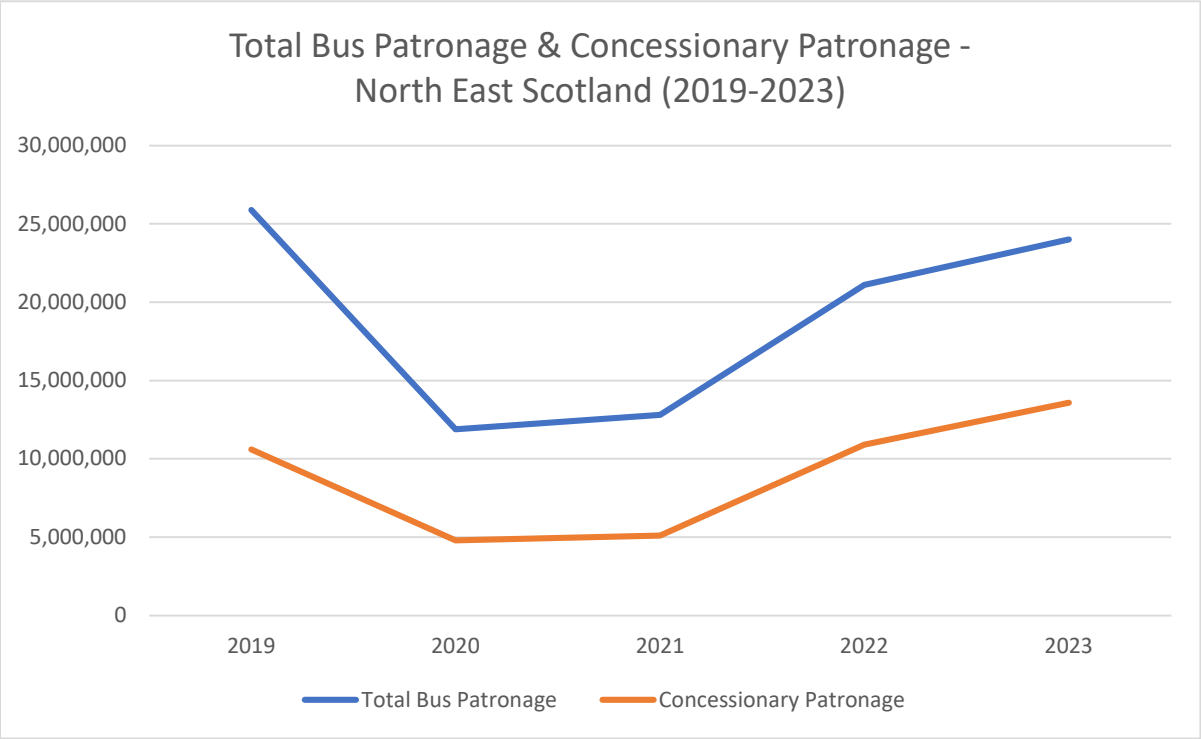


Figure 6e: Estimated Total Bus Patronage & Concessionary Bus Patronage (2019-2023)

Source: Requested Data from ACC, AC, First Aberdeen & Stagecoach

As expected in 2020 patronage was impacted significantly as result of covid lockdown restrictions with limited recovery in 2021. It is positive to see a recovery in 2022 and subsequently in 2023, seeing the region move towards patronage numbers before covid.

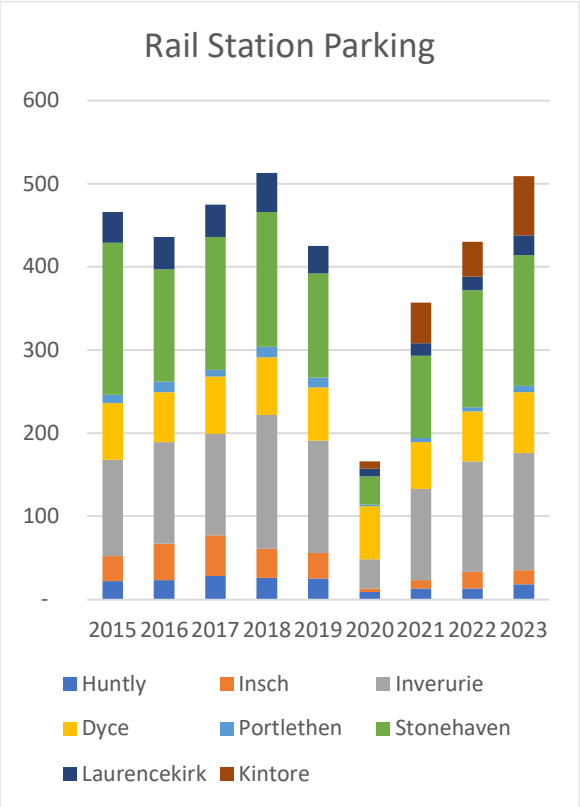
This recovery has been helped by the introduction of the Young Persons Free Bus Travel Scheme launching in 2022. This has seen a growth in use by Under 22s with a slower return to bus by over 60s during this period. This means currently in the north-east over half of bus journeys are by those entitled to a concessionary fare.

Through the North East Bus Alliance, Nestrans will continue to support bus operators to grow bus patronage in the region. Key to an attractive bus network is punctual services and the introduction of the city centre bus priority measures in August 2023 have played a role in improving this for the region's bus network. These measures have improved punctuality for both First Aberdeen and Stagecoach services, with both operators reinvesting savings such as the joint free weekend travel promotion during January 2024[1].

[1] https://news.stv.tv/north/first-bus-and-stagecoach-to-offer-free-weekend-travel-across-aberdeen-and-aberdeenshire

6f – Park & Ride Use in North East Scotland

Nestrans conducts an annual monitoring exercise of the current 13 park and ride sites located in the north east of Scotland. Within the 13 sites are eight rail service sites (Figure 6f i) and five bus service sites (Figure 6f ii).



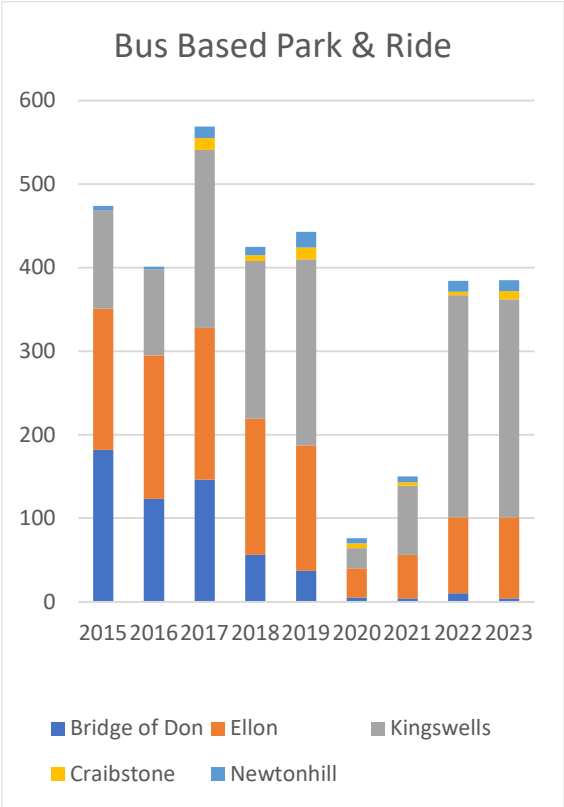


Figure 6f i (Left): 2015 to 2023 Park & Ride Parking Counts – Rail sites

Figure 6f ii (Right): 2015 to 2023 Park & Ride Parking Counts – Bus sites

Source: Nestrans Park & Ride Monitoring

From Figure 6f i, it is apparent that some of the rail sites in the region are currently outperforming the count made pre-pandemic in 2019. Inverurie, Dyce and Stonehaven station car parks all experience close to parking capacity. Park & Ride from bus sites has seen some decline in recent years with all sites apart from Kingswells seeing a reduction in the numbers of estimated users. In that time services have been lost from sites most notably the re-routeing of the First Bus 1B service in August 2023 saw the service no longer stopping at the Bridge of Don site (prior to this count). An important part of maximising the bus park & ride sites is the vision for Aberdeen Rapid Transit with Bridge of Don, Kingswells and Craibstone likely to be key interchange points within the desired routeing.

6g – Potential for Modal Shift – Travel to Work & Day Trips

As part of the 2023 Nestrans Comprehensive Travel Study, participants were asked about their travel habits and how likely they could be to travel by an alternative mode. Figure 6g shows the response of participants to the possibility of switching work travel to an alternative mode and the same for day trips.

Do you feel it's possible to make your journey to work either bus, train, bike or walking?						
Response	*Aberdeen City*		*Aberdeenshire*		*North East region*	
	Number	*%*	*Number*	*%*	*Number*	*%*
Yes, by bus	78	39	48	18	125	27
Yes, by train	14	7	17	6	31	7
Yes, by bike	39	20	30	11	69	15
Yes, walking	49	25	42	15	91	19
No, not possible	87	44	179	66	266	57
Total	198	100	271	100	469	100

Figure 6g i: Travel to work by alternative mode

Do you feel it's possible to use either bus or a train for your trips away?						
Response	*Aberdeen City*		*Aberdeenshire*		*North East region*	
	Number	*%*	*Number*	*%*	*Number*	*%*
Yes, by bus	95	35	91	25	186	29
Yes, by train	105	39	114	31	219	35
Yes by another type of transport (please specify)	1	0	4	1	5	1
No, not possible	138	51	226	62	364	58
Total	269	100	363	100	632	100

Figure 6g ii: Day trips by an alternative mode

Source: Nestrans Comprehensive Travel Study - 2023

Figure 6g i shows that there is some appetite to modal shift across the modes across the north east. It is worth noting that bus is the highest with 27% of respondents saying that it would be possible to make their journey to work by bus. It is also worth noting that walking is second regionally at 19% with 25% in the city stating that it would be possible. The focus group work as part of the Comprehensive Travel Study saw attendees raise concerns around the safety of walking in parts of Aberdeen City.

It is also worth noting that 35% of respondents feel that they could use rail for their day trips (as shown by Figure 6g ii). It is important to understand what is a barrier to currently doing more day trip travel by rail. Whilst for bus, 29% of respondents felt it could be used for day trips within the focus groups as part of the Comprehensive Travel Study. It was found that one of the key barriers to bus use was the lack of evening bus services leading to the perception that bus is not an option for late night travel home.