

National Transport Strategy Monitoring and Evaluation Report 2024

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Introduction

Scotland's National Transport Strategy (NTS2) was launched on the 5th February 2020. It sets out an ambitious and compelling vision for the transport system in Scotland over a 20-year period and outlines our four priorities for delivering this: Reduces Inequalities; Takes Climate Action; Helps Deliver Inclusive Economic Growth; and Improves our Health and Wellbeing. Sitting under these priorities are our strategic policies. In addition to this, we set out more specific and time-constrained commitments for delivering our priorities and strategic policies in our annual NTS Delivery Plans. The most recent was published in December 2024.

Transport impacts on the everyday lives of the people of Scotland of all ages and at all times, underlining and reinforcing its fundamental importance. The transport budget, which includes maintaining and running the current system, as well as providing new infrastructure, is essential for almost all economic and is crucial for wellbeing, in terms of social interaction, from visiting friends and family, to accessing leisure activities and health services.

Transport has a key role to play in addressing inequalities and ensuring a just transition to net zero, both in terms of socio-economic inequality and providing those who need it most with access to communities and labour markets. Transport is also an important foundation for achieving all of the First Minister's priorities, which include: to eradicate child poverty; grow our economy; tackle the climate emergency, and improve public services. The Scottish Government's policy programme will focus on these four areas, which align strongly with the four priorities of the National Transport Strategy – reduces inequalities, takes climate action, delivers inclusive economic growth, and improves our health and wellbeing.

To ensure progress is delivered against these priorities, a <u>monitoring and evaluation</u> <u>framework</u> was established, highlighting a range of primary and secondary indicators against which progress towards the NTS outcomes could be measured. <u>An analytical report</u> which provided baseline data for each of these measures was published in June 2022.

In addition, a commitment was made to report to the Scottish Parliament three years on from the launch of the strategy. This <u>report to parliament</u>, published in 2023, provided an overview of the continued commitment to the Strategy and the actions being taken by the Scottish Government to deliver the vision and priorities for transport.

Our monitoring and evaluation approach ensures accountability on progress. It allows us to identify areas where we are performing well and others where we might need to take corrective action. This could be achieved via adjustments to actions in

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future Delivery Plans, as required, to bring us back on track towards achieving the transport system for the future as envisioned in our Strategy.

This report provides data on headline and secondary indicators from the evaluation framework for the National Transport Strategy, updating the position since the baseline in 2019 and providing commentary on progress. The report provides background on the implementation of the NTS2 before presenting data in both summary and in depth on the key indicators informing progress under each of the four priorities of the strategy.

Background

Context

The NTS was launched in February 2020, immediately prior to the COVID-19 Pandemic. COVID-19 had a profound impact on travel and transport in Scotland, with restrictions placed on travel at various points throughout the Pandemic, fear of transmission of the virus, and changes in working practice all impacting on demand for transport services.

The Scottish Government's response to the Pandemic was to pivot available resource to address the immediate impacts. For Transport Scotland, Scotland's transport agency, this meant putting on hold many of the policies designed to progress and deliver on the NTS outcome and focus instead on ensuring the transport system was supported and services were safe if using to use.

The <u>first NTS Delivery Plan</u> for 2020-2022 recognised the impact of the pandemic on the public transport system and the need for Scottish Government financial support to continue its operation amid sharp declines in passengers at that time. It also highlighted activity aimed at maximising some the positive impacts the Pandemic had on transport behaviours, particularly the Spaces for People fund which supported local authorities to put in place temporary measures which provide safe walking and cycling in support of physical distancing, and funding for the Scotland Cycle Repair Scheme.

The <u>second NTS Delivery Plan</u> covering 2022-2023 continued to promote walking, cycling, public transport and bike, car and ride sharing in preference to single occupancy car use. Planned investment was targeted at infrastructure, proactive promotion and improved co-ordination across all transport modes with the aim of achieving generational change in behaviour and attitude towards transport choices, encouraging demand for active travel and low carbon transport options and encouraging multimodal journeys as the norm.

Since then, a number of key projects have been completed, including the transfer of ScotRail into public ownership in 2022; continued investment in the railway; and extension of the concessionary travel scheme to children and young people under the age of 22. The second <u>Strategic Transport Projects Review</u> (STPR2) was also published, which sets out priorities for investment and providing further insight on the programming of the 45 STPR2 recommendations.

The third NTS Delivery Plan, covering the period 2023-24, noted that Scotland continues to face many challenges across society and business including the cost of

living crisis, residual impacts of the COVID-19 pandemic and record levels of inflation. It outlined measures to build on ongoing measures including developing Scotland's strategic transport infrastructure; publishing an Islands Connectivity Plan Strategic Paper and the draft Long-Term Plan for Vessels for Ports; and work to deliver a fair transition to Net Zero in the transport sector.

The fourth Delivery Plan for the NTS for 2024-25, due to be published in December 2024, sets out the policies that will be taken forward to deliver against the NTS priorities and highlights progress from the previous year. This includes the establishment of a pathfinder Pilot as part of the Fair Fares Review (the "ScotRail Peak Fares Removal Pilot") to encourage modal shift from car to rail by reducing the cost of travel at peak times for a period of six months between 2 October 2023 and 29 March 2024. This was extended to the end of September 2024 and Transport Scotland published an impact evaluation on this project.

This year also saw the reopening of Levenmouth railway, at an investment level of £116 million, with two fully accessible stations at Cameron Bridge and in Leven, and passenger services commencing on the 2 June 2024. Over 1km of active travel bridges and routes connecting communities to the new stations are in delivery as part of the programme.

Work is also currently underway on the Islands Connectivity Plan (ICP), setting out how ferry services will be delivered, and strengthened, working towards a long-term vision, with <u>findings from the recent public consultation and community engagement on various islands</u> published alongside our initial response to the consultation report.

Further details and links to published research and evaluations since the NTS was introduced can be found at Annex A.

Baseline and Data Limitations

An analytical baseline report was produced and published in June 2022. Where possible, this report used data from 2019 to establish baselines for measurement. Although this period is prior to the publication of the NTS2 in 2020, it is the last full year in which travel was unaffected by the COVID-19 Pandemic. It therefore provides data from a 'typical' year pre-pandemic with regard to transport and travel, as opposed to 2020 where these were significantly impacted by the COVID-19 Pandemic and the associated restrictions on travel.

In many cases, data for 2020 and 2021 is not directly comparable with other years. However, these figures still can still offer insight into travel behaviour during the pandemic, which has had a continuing impact.

Data availability has also been affected by the impact of the pandemic and this in turn impacts on the continuity and comparability of data before, during, and after the pandemic period. For example, the Scottish Household Survey (SHS) - a key source for monitoring transport and travel in Scotland - made methodological changes in 2020 and 2021 in response to the pandemic. These changes included shifting from face-to-face to online or telephone interviews and mean that data from 2020 and 2021 are not directly comparable with other years. This limits our ability to use the SHS to report on changes to transport and travel habits during the pandemic period, and to report on change since the NTS baseline period in instances where survey questions were most recently asked in 2020 or 2021.

Some of the indicators used inform progress against more than one of the NTS priority areas and are therefore reported on more than once in the report. The majority of the data that is used for the indicators comes from official statistics published on an annual basis by the Scottish Government. The two key publications are Transport and Travel in Scotland, and Scottish Transport Statistics.

Transport and Travel in Scotland reports includes Scottish Household Survey transport data, including results from the Travel Diary. The Scottish Household Survey (SHS) is an annual survey of the general population in Scotland, carried out since 1999. It collects reliable and up-to-date information on a range of topics through a random sample of people in private residences. The survey covers a number of topics relating to transport and travel, including a 'travel diary', which involves respondents recounting the details of all of the journeys they made the day before their survey interview.

The latest <u>Transport and Travel in Scotland report</u>, published in November 2024, presents transport and travel findings from the 2023 Scottish Household Survey. The report provides analysis on the latest annual figures but also trend analysis showing changes over time. This allows for comparisons between the NTS baseline period and subsequent years' data, where possible.

Scottish Transport Statistics is a compendium statistics publication pulling together data on all aspects of transport in Scotland from a wide range of sources. The publication covers all modes of transport and provides statistical commentary and analysis of a broad range of data. The latest Scottish Transport Statistics publication covers data up until 2022-23.

Other sources of data contained within the reports come commissioned research undertaken on behalf of Transport Scotland; in-house analysis; and data gathered by Transport Focus, an independent watchdog for transport users.

Summary of Key Points

As the NTS is a 20-year strategy, it is still relatively early to make a firm assessment of progress. The COVID-19 Pandemic also had a fundamental impact on travel behaviours and demand for transport, and there are legacy impacts from this which have changed the way people use and require transport. Measuring the progress of the NTS at this stage is therefore more difficult as a result.

Over and above the COVID-19 Pandemic's impact on travel behaviour, the pandemic also affected our ability to monitor and evaluate the NTS. The NTS Monitoring and Evaluation Framework was designed prior to the COVID-19 Pandemic and assumed that the data to be used to evidence progress of the Strategy would be available continuously on a comparable basis. This would allow for analysis of data trends even over the initial years of the Strategy. However, due to pandemic-enforced changes to data collection during 2020 and 2021 for some of the indicators, the figures for these years are not comparable with other years and our ability to analyse trends is limited.

Natural fluctuations in the data limit the extent to which firm conclusions on progress at this stage of the strategy can be drawn from changes between single years.

However, despite these external factors, since the baseline period of 2019, there has been some evidence of progress against the many of the headline indicators within the NTS Monitoring and Evaluation Framework.

Reduces Inequalities

Bus remains the most commonly used public transport mode and is more likely to be by those with lower incomes than those with higher incomes. The majority of people say their transport costs are affordable and that they are satisfied with public transport, although satisfaction with public transport is lower than in the baseline period.

The overall number of bus and train journeys continues to recover from the impact of the pandemic and overall, people are still travelling less on public transport than in 2019. The number of local bus journeys in Scotland was 18% lower in 2022/23 than in 2019/20, and the number of Scotrail passengers was 16% lower in 2023/24 than in 2019/20.

Among the population as a whole, in 2023, 38% reported using the bus at least once in the last month, with 7% using it every day or almost every day. This is similar to the baseline figures of 2019 which were 39% and 8% respectively. Bus use at least

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once in the past month is more common among young people, particularly those aged 16-19 (64%); those in large urban areas (56%), those on lower incomes (50% of those earning less than £10,000 p.a.) and those in the 20% most deprived areas (47%). Women (40%) are more likely to report using the bus at least once in the last month than men (35%).

Evidence from the <u>one year on evaluation</u> of young persons' free bus travel scheme showed that increasing numbers of young people were travelling by bus across a wide range of journey purposes because of the scheme. There is some limited early evidence of modal shift away from car use to buses, with young people using the bus both to make journeys they would have made anyway as well as a large volume of new/additional journeys.

In 2023, 28% of the population reported using the train at least once in the last month. This is slightly less than the baseline figure for 2019 which was 30%. Nine per cent of the population used it once a week or more in both 2019 and 2023. Using the train at least once in the last month is more common among those from higher income households (40% of those from households earning over £50,000 p.a.), those in the 20% least deprived areas (34%), those in 'large urban' or 'other' urban areas (34% and 29% respectively), and those aged 16-19 (38%) and aged 20-29 (39%). Train use at least once in the last month was less common among disabled people (17%) compared to non-disabled people (32%).

In 2023, 70% of people said that their transport costs were either fairly easy or very easy to afford. This is an increase from 2022 (64%). Comparison with the baseline period is not possible, as comparable data has only been collected from 2022.

Those in households on incomes up to £10,000 were less likely to consider their costs affordable (57%).

The Scottish Household Survey also asked users of bus and rail services whether they agreed with a number of statements about their services. Regarding rail, 52% agreed that 'train fares are good value'. This was a non-statistically significant increase in agreement compared with 2019 (48%). Note that fieldwork period for the survey continued until February 2024 when the ScotRail Peak Fares Removal Pilot was in operation.

For bus, the percentage of users agreeing that bus fares were good value increased between 2019 and 2023 from (55% to 62%).

Satisfaction with public transport has fluctuated since the baseline but remains lower than in 2019. This mirrors the recent trend in satisfaction in public services overall. A combined measure of satisfaction with the three main public services (local health services, schools and public transport) decreased from 53% in 2019 to 43% in 2023.

Individually, all three public services saw a drop in satisfaction compared with the baseline. The largest drop was for satisfaction with local health services (from 80% in 2019 to 67% in 2023), although levels of satisfaction were lowest for public transport (64% in 2023).

Takes Climate Action

There has been a slight increase in the proportion of journeys by sustainable modes of travel, and people are undertaking fewer journeys.

In 2023, the average number of journeys per day per adult was 1.59. This is less than the baseline position in 2019 which was 1.94 journeys per day.

Over a third (35%) of journeys in 2023 were made using sustainable modes. This is slightly higher than the baseline position when 33% of journeys were made using sustainable modes. The increase is due to greater use of active travel in 2023 compared to 2019.

There has also been a slight increase in short journeys by sustainable mode. For journeys under two miles, in 2023, 52% of all trips were made by active modes. These figures are higher than in 2019, when 49% of trips were made by active modes. For journeys under 5 miles, 39% of all trips were by active modes. These figures are higher than in 2019, when 35% of trips were made by active modes.

There are also increases to levels of walking for pleasure since the baseline position in 2019.

The number of ultra-low emission vehicles registered in Scotland for the first time in 2022 was 21,980, a 23% increase on the corresponding figure for 2021 (17,900) and over 300% higher than the baseline figure of 2019 (5,066).

Latest emissions (2021) shows that 59% of all NOx emissions were from transport, which is a decrease from 2019 when transport comprised 64% of overall emissions. Note, however, that this data was gathered at a time when road traffic (which is greatest share of transport emissions) was below 2019 levels.

Helps Deliver Inclusive Economic Growth

Shopping and commuting remain the main journey purposes; visitor numbers to Scotland have increased since the baseline; and rail and ferry services demonstrate good levels of punctuality and reliability.

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There has been a reduction in the proportion of commuting trips between 2023 (21%) and the baseline in 2019 (23%). However, it remains one of the main journey purposes, alongside shopping (24%), going for a walk (10%) and visiting friends and relatives (10%).

International travel to Scotland continued its recovery from the COVID-19 pandemic. Visits were up 23% compared to 2022 and 15% compared to the baseline of 2019. Similarly, the volume of domestic trips and nights was higher in 2023.

There have been reductions in the volume of water freight and air freight carried, while the volume of rail freight is at the same level as the baseline. Figures on road freight are not comparable to the baseline.

Scotrail rail services show high levels of performance. In 2022-23, 89.0% of ScotRail services, arrived on time. This is the same as at the baseline figures for 2019-20.

For ferry services, there are measures of both contractual reliability and actual reliability. Contractual reliability makes allowances for circumstances out with operators' control, including extreme weather conditions.

For Caledonian MacBrayne, measures of both contractual and actual reliability of lifeline ferry services were high. The level of contractual reliability (the number of timetabled sailings actually operated) was 99% in 2022-23 and the level of punctuality (against the published timetable) was 100%. This is similar to the baseline of 2019-20. For the measures of actual reliability for 2022-23, corresponding figures published in CalMac's strategic report were 95% and 97% respectively.

For Northlink, the level of contractual reliability of lifeline ferry services that were both punctual and reliable was 100% for both Aberdeen routes and the Pentland Firth in 2022-23. This is the same as the baseline position of 2019-20. Figures quoted by Northlink Ferries performance monitoring report on actual reliability and punctuality for 2022-23 are 97% and 90% respectively.

With regard to reasons as to why people do not use bus and train services more than they do, there have been slight changes. In 2022, 10% of respondents to the Scottish Household Survey who used the bus infrequently mentioned 'lack of service' as a reason, a slight increase on the baseline position (8%). As in 2019, this issue was more pronounced for those in rural areas (24%) compared to those in urban areas (6%).

'No direct route' was given as a reason by 4% of respondents, a decrease on the baseline position of 7%. This again was more prevalent for those in rural areas (6%) compared to those in urban areas (4%).

In 2023, 12% of Scottish Household Survey respondents who used the train infrequently mentioned 'no nearby station' as a reason. This is similar to the baseline position of 13%. Thirty-eight per cent of respondents in 2023 said that nothing had discouraged them from using the train more often. This is similar to the baseline position of 37%.

Improves our Health and Wellbeing

Road casualties have reduced since the baseline.

There have been 25% fewer overall road casualties in 2023, compared to 2019. These included:

- 3,703 slight injuries, 1,240 less that in 2019;
- 1,930 serious injuries, 455 less than in 2019; and
- 155 deaths nine less than in 2019.

In 2023, perceptions of safety were higher during the day than in the evening. During the day, 95% of bus users agreed they felt safe and secure using the bus. By contrast, 70% agreed that they felt this way using the bus in the evening, while 11% disagreed. This is similar to the baseline position in 2019.

In 2023, among those who had used the train in the last month, 96% agreed that they felt safe and secure using the train during the day. By contrast, 80% agreed that they felt this way during the evening, while 8% disagreed. This is broadly similar to the baseline position though there has been in an increase in the proportion of people agreeing that they feel safe and secure using the train in the evening from 2019 (76%).

The proportion of journeys made for leisure/recreation is higher than the baseline position. Looking at journeys by purpose in 2023, 33% of travel is for recreation/leisure, compared to 67% of travel that could be characterised as non-leisure. In 2019, 28% of travel was for recreation/leisure.

The latest data available (2021) on measures of air quality (NOx; PM10; PM2.5) all show a reduction from the baseline position. However, it should be noted that this may be as a result of the COVID-19 pandemic when road traffic levels were significantly affected over this period.

The following chapters consider each of the NTS priorities outcomes and report on the indicators within the <u>Monitoring and Evaluation framework</u>.

Reduces Inequalities

Walking as a means of transport

Walking as a means of transport at least one day in the past week was reported by 66% of the population in 2023. This is similar to the baseline position in 2019 (67%). Walking as a means of transport is most common among those living in large urban areas (74%), those on higher incomes (households earning more than £40,000 p.a.) and living in the least deprived areas (73%). There is little difference between men and women with regard to walking as means of transport; and is more common among those aged 49 or under.

Walking as a means of transport was more common among non-disabled people than disabled people, with 71% of non-disabled people doing this at least one day in the last week in 2023, compared to 51% of disabled people.

Walking just for pleasure/to keep fit

Walking just for pleasure/to keep fit at least one day in the past week was reported by 70% of the population in 2023. This is an increase compared to the baseline position in 2019 (62%). It is most common among middle- and higher-income households and in the least deprived areas. A greater proportion of men than women report walking just for pleasure/to keep fit (72% and 68% respectively), and older age groups are least likely to do so.

Walking just for pleasure/to keep fit at least one day in the past week is more common among non-disabled people (77%) than disabled people (49%).

Walking as a means of transport has changed little over time, with around two thirds of respondents doing this in the last week in 2019, 2021 and in 2023. Walking just for pleasure/to keep fit appears to have increased, from 62% in 2019, to 70% of respondents in 2023. This was higher in 2021 (74%) which may be as a result of the COVID-19 pandemic and increased levels of walking and cycling for leisure during this period.

Cycling as a means of transport

Cycling as a means of transport at least one day in the past week, was reported by 6% of all people in 2023, which is similar the 2019 baseline figure (5%). Men (8%) are more likely to report that they have cycled as a means of transport at least one day during the past week than women (4%), as are those from both the lowest and

highest income households (9% of those whose household income is over £50,000 p.a.; 8% of those whose household income is less than £10,000 p.a.).

Cycling as a means of transport at least one day in the past week is more common among non-disabled people (7%) than among disabled people (3%).

Cycling just for pleasure/to keep fit

Cycling just for pleasure/to keep fit at least one day in the past week was reported by 7% of the population in 2023. This is similar to the baseline position in 2019 (6%). Men (10%) are more likely to report that they have cycled just for pleasure/to keep fit at least one day in the past week than women (5%), as are those from higher income households (10% of households whose earnings are over £50,000 p.a.) and those in 20% least deprived areas (12%).

Cycling just for pleasure/to keep fit at least one day in the past week is more common among non-disabled people (8%) than among disabled people (4%).

Cycling as a means of transport has remained relatively unchanged over time: 6% of respondents did this at least once a week in 2012, 2014 and 2016, compared to 5% in 2019, 7% in 2021 and 6% in 2023. Similarly, cycling just for pleasure/to keep fit remains relatively unchanged over time, at 6% between 2012 and 2019 and at 7% in 2023. There was an increase to 9% in 2021 which may be as a result of the COVID-19 pandemic and increased levels of walking and cycling for leisure during this period.

Figure 1 below shows levels of walking and cycling at least once in the past week.

Walking and Cycling at least once in the past week 80 69.8 66.5 66.1 70 62 60 50 % 40 30 20 7 5.7 5.8 10 4.9 0 Walking at least once Walking at least once Cycing at least once in Cycling at least once in in the past week for in the past week for the past week for the past week for pleasure transport pleasure transport ■2019 ■2023

Figure 1: Levels of walking and cycling

Source: Scottish Household Survey

Bus use

Among the population as a whole, in 2023, 38% reported using the bus at least once in the last month, with 7% using it every day or almost every day. This is similar to the baseline figures of 2019 which were 39% and 8% respectively. Bus use at least once in the past month is more common among young people, particularly those aged 16-19 (64%); those in large urban areas (56%), those on lower incomes (50% of those earning less than £10,000 p.a.) and those in the 20% most deprived areas (47%). Women (40%) are more likely to report using the bus at least once in the last month than men (35%).

There was no difference between disabled people and non-disabled people regarding bus use at least once in the last month.

Bus use has fallen overall in the last ten years, with journeys declining by from 420 million in 2012-13 to 301 million in 2022-23. Similarly, journey kilometres have also fallen from 327 million in 2012-13 to 275 million in 2022-23.

The proportion of those using the bus in the last month declined slightly between 2014 and 2019. Bus use has recovered since a fall in the pandemic years of 2020 and 2021, and the proportion using the bus in the last month was at a similar level in 2023 compared to 2019. In 2023, 38% of people had used the bus at least once in the last month. This is very similar to the figure in 2019 (39%).

Train use

In 2023, 28% of the population reported using the train at least once in the last month This is slightly less than the baseline figure for 2019 which was 30%. Nine per cent of the population used it once a week or more in both 2019 and 2023. Using the train at least once in the last month is more common among those from higher income households (40% of those from households earning over £50,000 p.a.), those in the 20% least deprived areas (34%), those in 'large urban' or 'other' urban areas (34%), and those aged 16-19 (38%) and aged 20-29 (39%). There is little difference of train use between men and women.

Train use at least once in the last month was less common among disabled people (17%) compared to non-disabled people (32%).

Between 2012-13 and 2018-19, ScotRail passenger journeys had increased from 83 million to 98 million. This dropped significantly during 2020-21 and 2021-22 as a result of the COVID-19 Pandemic. Passenger journey numbers in 2022-23 are at 64 million as rail patronage continues to recover from the effects of the pandemic.

Overall, the proportion of people that report using the train in the last month was 28% in 2023. This is similar to proportions observed between 2014 and 2019 which had been around 30%, but an increase since 2022 where the figure was 24%. Figure two below shows levels of bus and train use at least once in the past month.

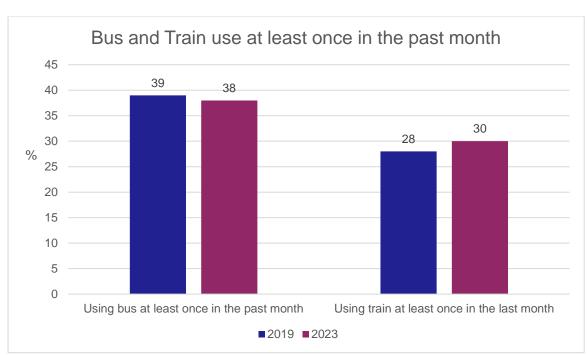


Figure 2: Bus and Train Use

Source: Scottish Household Survey

20% most

deprived

aeas

Disabled Non-Disabled

Figure three below shows bus use at least once in the past month by selected demographic and socioeconomic characteristics.

Using bus at least once in the past month 70 64 60 50 47 50 40 38 38 38 40 35 % 30 20 10 0

16-19

2023

Net Household

income less

than £10k

Figure 3: Bus use by Characteristics

Source: Scottish Household Survey

All

Male

Female

Figure four below shows train use at least once in the past month by selected demographic and socioeconomic characteristics.

Using train at least once in the past month 70 60 50 40 40 39 38 40 35 34 32 % 28 30 17 20 10 0 Net household 20% least income + £50k deprived aras p.a. **2023**

Figure 4: Train use by Characteristics

Source: Scottish Household Survey

Satisfaction with Public Transport

The proportion of all survey respondents stating that they were very or fairly satisfied with public transport in 2023 was 64%, a four-percentage point drop from 2019 (68%). Satisfaction with public transport was higher amongst actual users of public transport (those that had used bus or train in the past month) with 74% of users reporting that they were satisfied in 2023. This is similar to levels of satisfaction recorded in 2019 (76%). When looking specifically at bus and train users, 77% of bus users and 71% of train users reported that they were satisfied with public transport.

Satisfaction with public transport was lowest in rural areas. Satisfaction rates for those living in remote rural and accessible rural areas (47% and 46% respectively) contrasted with a satisfaction rate of 72% for those living in large urban areas.

Barriers to Cycling to work

In 2023, the most prominent barrier to cycling to work was 'too far to cycle', reported by 43% of respondents. An additional 17% reported that there were 'concerns about cycling in traffic', and 15% that the weather was too cold/wet/windy. In addition, 13% reported it would be inconvenient.

The answer 'too far to cycle' was higher in rural areas, at 58%, compared to urban areas, at 39%.

Lack of access to bikes – reported by 12% overall – was higher for women, at 17%, compared to men, at 7%. This was also higher in urban areas at 13% compared to rural areas at 7%.

Figure five below shows the reasons why people do not cycle work.

Reasons why do not cycle to work 50 43 40 30 % 17 20 15 15 13 12 10 3 2 0 2023 ■Too far to cycle ■ Concerns about cycling in traffic Weather too cold / wet / windy It would be inconvenient ■ Concerns for personal safety on dark / lonely roads Don't have a bike ■ No way to carry luggage / shopping ■ Nowhere at work to shower / change ■ Health or fitness reasons ■ Not enough safe places to lock bike Can't ride a bike ■ Other

Figure 5: Reasons why People do not Cycle to Work

Source: Scottish Household Survey

Barriers to walking

The main discouraging factors from walking more often cited by people in 2023 were health reasons or unable to walk far (16%) and the weather (11%). This is similar to the 2019 baseline. Forty-two percent of people said that "nothing" discouraged them from walking more often than they do which is a reduction from 2019 levels (55%).

Barriers to Bus Use

The latest data for this indicator comes from the 2022 Scottish Household Survey. The data indicates that 'use my own car' is the most common reported reason for infrequent bus users not using the bus more often, at 24% (26% 2018; 23% 2020).

The reasons 'no need' and 'nothing discourages' were chosen by 24% (20% 2018; 28% 2020) and 16% (13% 2018; 15% 2020) respectively.

The reasons 'inconvenient' and 'takes too long' were reported by 7% (10% 2018; 5% 2020) and 6% (10% 2018; 7% 2020) respectively, while 'cost' was a barrier for 4% of respondents (7% 2018; 5% 2020).

As a barrier, health reasons were more common among older age groups and less common among younger ones. They were least common, at 1%, among those aged 16-19. By comparison they were reported by 12% of those aged 60-69 and 32% of those over 80. This barrier was more common among those in the lowest 30% of incomes (17%) compared to the highest 30% of incomes (3%). In addition, health reasons were reported as a barrier by 27% of disabled people compared to 2% of those who were not disabled.

The barrier 'Lack of service' varied by location, with 24% of those in rural areas saying this relative to 6% of those in urban areas. This was also the case for the barrier 'Too infrequent', which was reported by 13% of those in rural areas, compared to 4% of those in urban areas.

Figure six below shows the main reasons that discourage people from using bus more than they do.

What discourages you from using buses more often than you do? 35 30 23.5 23.6 25 20 15.9 % 15 9.5 8.4 7.4 10 6.3 6.2 5.7 4.4 3.5 3.7 5 2022 ■ Nothing discourages ■ Takes too long Inconvenient ■ No direct route ■Use my own car ■ Need a car for / at work ■ Public transport unreliable ■ Lack of service ■ Cost ■ Too infrequent ■ Health reasons ■ No need ■ Prefer to walk/cycle

Figure 6: Main Reasons for not using the bus more

Source: Scottish Household Survey

Barriers to Train Use

Amongst infrequent users of train, the main identifiable factor which discouraged them from using the train more often was 'no need' (25% in 2023; 20% in 2019; 15% in 2016).

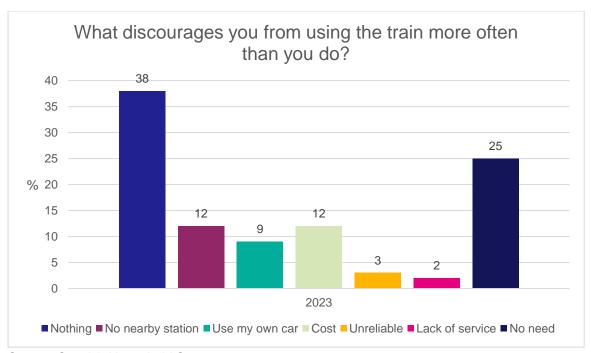
In 2023, 12% reported 'no nearby station' as a discouraging factor (13% in 2019; 8% in 2016), 12% cited costs (15% in 2019; 11% and 2016) and 9% said 'use my own car' (5% in both 2019; 3% in 2016).

A significant proportion of infrequent train user said that 'nothing' discouraged them from using it (38% in 2023; 37% in 2019; 54% in 2016).

Amongst those that had not used the train in the past month, health reasons were more commonly cited as a barrier among older age groups and were less common among younger ones. They were least common, at 1%, among those aged 20-29. By comparison they were reported by 8% of those aged 70-69 and 16% of those over 80. This barrier was more common among those in the lowest 30% of incomes (8%) compared to the highest 30% of incomes (1%). In addition, health reasons were reported as a barrier by 13% of disabled people compared to 1% of those who were not disabled.

Figure seven below shows the main reasons that discourage people from using train more than they do.

Figure 7: Main Reasons for not Using the Train More



Source: Scottish Household Survey

Costs and Affordability

Average weekly household expenditure in Scotland on transport and vehicles in 2020-22 was £69.20, representing 14.5% of total household expenditure. On average, £28.50 was spent on the purchase of vehicles, £25.80 on the operation of personal transport (including £16.60 on petrol, diesel and other motor oils) and £14.80 on transport services (such as bus and train fares)

70% of people said their transport costs were either fairly easy or very easy to afford. Though data for this indicator was not collected in 2019, comparison with 2022 data (64%) shows a six-percentage point increase. Those in households on incomes up to £10,000 were less likely to consider their costs affordable (57%).

Those aged 60 and over were more likely to consider their costs affordable. Sixty-seven per cent of those aged 16-19 and 62% of those aged 20-29 said their costs were affordable. Disabled people (61%) were less likely than non-disabled people (73%) to consider their costs affordable. Those in large urban areas (63%) were less likely to consider their costs affordable.

54% of respondents said that transport costs affected the method of travel they used. This is an increase on the 2022 figure (48%).

Users and non-users of public transport were similarly likely to view transport costs as affordable. Sixty-eight per cent of people who used public transport in the past

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month viewed public transport as affordable, compared with 71% of those that had not used public transport.

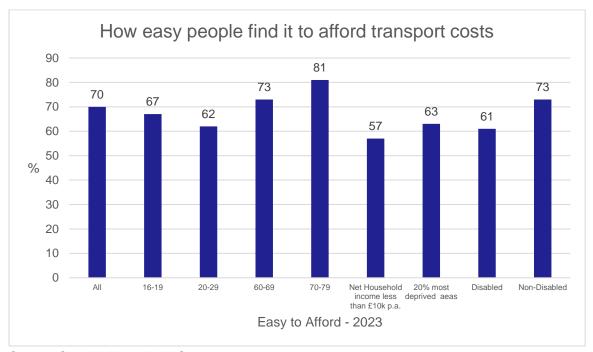
Sixty-nine per cent of bus users and 73% of rail users viewed transport costs as affordable.

The Scottish Household Survey also asked users of bus and rail services whether they agreed with a number of statements about their services. Regarding rail, 52% agreed that 'train fares are good value'. This was a non-statistically significant increase in agreement compared with 2019 (48%). Note that fieldwork period for the survey continued until February 2024 when the ScotRail Peak Fares Removal Pilot was in operation.

For bus, the percentage of users agreeing that bus fares were good value increased between 2019 and 2023 from (55% to 62%). Transport Focus, an independent watchdog for transport users, also asks bus users in Scotland about value for money with the most recent figures (2023) showing that 68% were satisfied with this.

Figure eight below shows how easy people find it to afford transport costs broken down by demographic and socioeconomic characteristics.

Figure 8: Affordability of Transport Costs



Source: Scottish Household Survey

Case Study: Young Person's Free Bus Travel Scheme – Year One Evaluation

The Young Persons' Free Bus Travel Scheme (also known as the Under 22s scheme) commenced on 31 January 2022. All children and young people aged 5-21 resident in Scotland (including asylum seekers and refugees) are eligible to apply.

The policy aims of the scheme are to encourage more sustainable travel behaviours and tackle issues related to transport poverty and access to services by: embedding positive sustainable travel behaviours; opening up social, education, employment and leisure opportunities; and reducing household outgoings to aid children, particularly those living in poverty.

Transport Scotland published an evaluation report one year on from the launch of the scheme. Though at an early stage of the scheme's implementation, there is already evidence that increasing numbers of young people are travelling by bus across a wide range of journey purposes because of the scheme. There is also some limited early evidence of modal shift away from car use to buses, with young people using the bus both to make journeys they would have made anyway as well as a large volume of new/additional journeys.

The evaluation also reports clear evidence that the scheme had opened up new and additional opportunities and had supported ongoing engagement or more frequent access to existing opportunities and activities.

The scheme was also felt to have provided equal travel access to opportunities by removing the transport cost barrier. The evaluation reported that there was significant evidence that the scheme had positively impacted travel costs. Cost savings and removing the cost barrier was also one of the main benefits identified as a result of the scheme noted by all.

The evaluation concluded that the evidence showed not only are the short- and medium-term outcomes of the scheme being achieved, but also that some of the long-term outcomes were already being progressed.

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The Scheme will be evaluated again in 2025, three years on from implementation.

Takes Climate Action

Transport Emissions

Transport emissions have fallen from 14.88 mt of CO2e in 1990 to 11.6 mt in 2021, although there have been fluctuations in overall emissions since 1990.

Since 2017, transport emissions have declined year on year, though rose in 2021 following historic low-level recorded in 2020 as a result of the COVID-19 pandemic.

Figure nine below shows transport greenhouse gas emissions from 2009 to 2021.

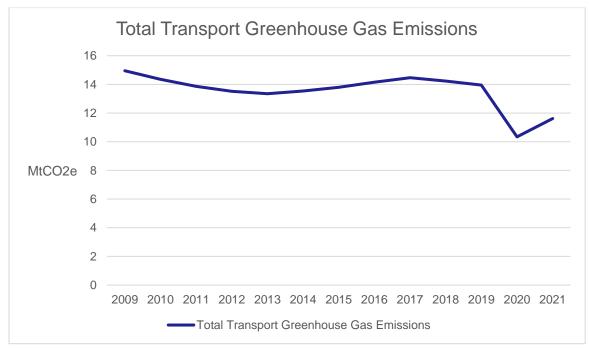


Figure 9: Total Transport Greenhouse Gas Emissions

Source: Scottish Transport Statistics

In 2021, cars represented 41% of the total of transport emissions, followed by Heavy Goods Vehicles (HGVs) (16%). Lights Good Vehicles (LGVs) and domestic shipping each contributed 15% of overall emissions. In the context of transport, overall road transport accounts for 75% of emissions.

Sustainable Mode Share

In 2023, 35% of journeys were made using sustainable modes. Other modes, by contrast, were used in 65% of journeys.

By journey length, 73% of journeys under 1 km were made by sustainable modes, while 51% of journeys between 1 km and 2 km were made in this way. By comparison, 20% of journeys between 5 km and 10 km were made sustainably while 11% of journeys over 40 km were made in this way.

The median journey length in 2023 was 4.0 km, as reported in Transport and Travel in Scotland, 2023 using data from the Scotlish Household Survey. Overall, most journeys are short, with 17% of journeys under 1 km and 55% under 5 km.

Under two miles, 56% of journeys were made using sustainable modes.

The percentage of sustainable journeys varied by group. For those in urban areas, 56% of journeys under two miles were sustainable, compared to 53% of these journeys in rural areas. Sustainable journeys are also more common among younger people, with 77% of the journeys of those aged 16-19 and 66% of the journeys of those aged 20-29 being made in this way. By comparison, 54% of journeys under two miles among those aged 50-59 were made using sustainable modes.

Journey modes also varied by income, with those in the lowest 30% of incomes making 65% of these journeys by sustainable modes, compared to 48% of these journeys made by those in the highest 30% of incomes.

Under five miles, 46% of journeys were made using sustainable modes.

The percentage of sustainable journeys varied by group. For those in urban areas, 46% of journeys under five miles were sustainable, compared to 37% of journeys of this length in rural areas. Sustainable journeys are also more common among younger people, with 75% of the journeys made by those aged 16-19 and 55% of the journeys among those aged 20-29 being made in this way. Among those aged 40-49, 40% of these journeys were sustainable. Journey modes also varied by income, with those in the lowest 30% of incomes making 57% of their journeys under five miles in this way, compared to 38% of the journeys made by those in the highest 30% of incomes.

Ultra Low Emission Vehicles (ULEVS)

As reported in Scottish Transport Statistics, ULEVs are vehicles that emit less than 75g of CO2 per kilometre. This compares to average petrol cars emissions of 168g of CO2 per kilometre and 103g for buses. The data for this section comes from data provided to the Scottish Government by the Department for Transport.

The number of ultra-low emission vehicles registered in Scotland for the first time in 2022 was 21,980, 23% up on the corresponding figure for 2021 (17,900) and over

300% higher than the baseline figure of 2019 (5,066). At the end of 2022 there were 64,447 ULEVs registered in Scotland.

Figure 10 below shows the number of ultra-low emission vehicles registered for the first time in Scotland from 2019 to 2022.

ULEVs registered for the first time

25,000

21,980

21,980

15,000

10,983

10,000

5,065

5,000

0

2019

2020

Number of cars registered

Figure 10: Ultra-low emission vehicles registered for the first time

Source: Scottish Transport Statistics

Satisfaction with Public Transport

Overall, satisfaction with public transport was lower in 2023 than in 2019.

The proportion of all survey respondents stating that they were very or fairly satisfied with public transport in 2023 was 64%, a four-percentage point drop from 2019 (68%). Satisfaction with public transport was higher amongst actual users of public transport (those that had used bus or train in the past month) with 74% of users reporting that they were satisfied in 2023. This is similar to levels of satisfaction recorded in 2019 (76%). When looking specifically at bus and train users, 77% of bus users and 71% of train users reported that they were satisfied with public transport.

Satisfaction with public transport was lowest in rural areas. Satisfaction rates for those living in remote rural and accessible rural areas (47% and 46% respectively) contrasted with a satisfaction rate of 72% for those living in large urban areas.

Helps Deliver Inclusive Economic Growth

Barriers to Public Transport Use

Bus

In 2022, 16% of respondents to the Scottish Household Survey who used the bus infrequently said that nothing discouraged them from using the bus more often. This is an increase from the baseline position which was 13%. A 'lack of service' was mentioned by 10% of respondents, an increase on the baseline position (8%). As in 2019, this issue was more pronounced for those in rural areas (24%) compared to those in urban areas (6%).

'No direct route' was given as a reason by 4% of respondents, a decrease on the baseline position of 7%. This again was more prevalent for those in rural areas (6%) compared to those in urban areas (4%).

Train

In 2023, 25% of Scottish Household Survey respondents said that nothing had discouraged them from using the train more often. This is a slight increase from the baseline position of 22%. The fact that there was 'no nearby station' was mentioned by 21% of respondents, a slight decrease from the baseline position of 24%.

No nearby station was reported by a larger proportion of those living in rural areas (38%) as opposed to those living in urban areas (16%).

'Lack of service': among those who hadn't used the train in the last month, this was reported by 1% of those in urban areas, compared to 3% of those in rural areas.

'No direct route': among those who hadn't used the train in the last month, this was reported by 1% of those in urban areas, compared to 3% of those in rural areas.

Rail Reliability and Punctuality

In 2022-23, 89.0% of ScotRail services, arrived on time. This is the same as at the baseline figures for 2019-20.

In 2022-23, 95% of ScotRail trains arrived within 10 minutes of the scheduled arrival time, 2% arrived 20 or more minutes late, and 2% were cancelled. This is also similar to the baseline figures for 2019-20.(Note, operation of Scotrail service changed from the baseline period from Abellio to Transport Scotland in 2022).

Ferry Reliability and Punctuality

For ferry services, there are measures of both contractual reliability and actual reliability. Contractual reliability makes allowances for circumstances out with operators' control, including extreme weather conditions.

For Caledonian MacBrayne, measures of both contractual and actual reliability of lifeline ferry services were high. The level of contractual reliability (the number of timetabled sailings actually operated) was 99% in 2022-23 and the level of punctuality (against the published timetable) was 100%. This is similar to the baseline of 2019-20. For the measures of actual reliability and punctuality, corresponding figures for 2022-23 published in CalMac's strategic report were 95% and 97% respectively.

For Northlink, the level of contractual reliability of lifeline ferry services that were both punctual and reliable was 100% for both Aberdeen routes and the Pentland Firth in 2022-23. This is the same as the baseline position of 2019-20. Figures quoted by Northlink Ferries performance monitoring report on actual reliability and punctuality for 2022-23 are 97% and 90% respectively.

Satisfaction with Public Transport

Overall, satisfaction with public transport was lower in 2023 than in 2019.

The proportion of all survey respondents stating that they were very or fairly satisfied with public transport in 2023 was 64%, a four-percentage point drop from 2019 (68%). Satisfaction with public transport was higher amongst actual users of public transport (those that had used bus or train in the past month) with 74% of users reporting that they were satisfied in 2023. This is similar to levels of satisfaction recorded in 2019 (76%). When looking specifically at bus and train users, 77% of bus users and 71% of train users reported that they were satisfied with public transport.

Satisfaction with public transport was lowest in rural areas. Satisfaction rates for those living in remote rural and accessible rural areas (47% and 46% respectively) contrasted with a satisfaction rate of 72% for those living in large urban areas.

Tourism Visitors

International

In 2023, international travel to Scotland continued its recovery from the COVID-19 pandemic. Visit numbers, nights spent and visitor spending all surpassed the levels seen in both 2019 and 2022.

International visitors made a total of 4 million visits to Scotland, stayed for 34.4 million nights and spent £3,593 million.

Visits were up 23% compared to 2022 and 15% compared to 2019.

The number of nights went up by 20% from 2022 and 25% from 2019.

Visitor spending increased in nominal terms by 13% compared to 2022 and by 41% compared to 2019.

Domestic

In 2023, Great Britain residents took 12.6 million overnight trips in Scotland with 34.6 million nights and £3.2 billion spent overall. When compared with 2019, the volume of domestic trips and nights was higher in 2023. The level of spend was the same as in 2019.

11% of all GB trips included an overnight stay in Scotland, with the share of total GB nights and spend at 10%.

The average duration of Scotland trips during the reporting period was 2.7 nights with an average spend per trip of £251.

Holiday trips made up the largest proportion of overnight trips taken in Scotland in 2023. It accounted for just over a third of total trips, 42% of total nights and 41% of spend.

Road Freight

Road freight is divided into inter-Scottish freight, imports and exports.

Inter-Scottish freight – freight with both an origin and a destination in Scotland - declined from 158.7 million tonnes in 2004 to 103.2 million tonnes in 2019. The

figure for 2022, which due to methodological changes to the survey of freight operators is not directly comparable with earlier years, is 97.8 million tonnes.

Scottish exports to the rest of the UK were 15 million tonnes in 2022. This figure is not comparable with earlier years.

Scottish exports to out with the UK were 0.3 million tonnes in 2022. This figure is not comparable with earlier years.

Scottish imports from the rest of the UK were 18 million tonnes in 2022, while imports from the rest of the world were 0.2 million tonnes over the same period. These figures are not comparable with earlier years.

Water Freight

Water freight has declined from to 67 million tonnes in 2019 to 59 million tonnes in 2022. This includes inbound and outbound freight.

Air Freight

Air freight has fallen from 58,914 tonnes in 2019 to 50,106 tonnes in 2022.

Rail Freight

In Scotland, total freight lifted by rail between April 2022 and March 2023 was four million tonnes, similar to the baseline position at 2019-2020. While this data refers to a distinct timeframe and is therefore not strictly comparable to the statistics above, it should indicate the relative scale of rail freight compared to other modes.

Journey Times to Basic Services

To demonstrate journey times – via walking and public transport – to basic services, Transport Scotland commissioned bespoke analysis for the baseline report to determine the fastest available journey time from the population weighted centroid (PWC) of each data zone to the closest example of a key service within specific time periods on a weekday. This analysis has not been replicated for this report as it is unlikely the results will have changed significantly since the baseline due to the way the data is gathered for this indicator. The full analysis and technical note for this indicator can be found in the National Transport Strategy Monitoring and Evaluation baseline report but a summary is provided below.

In total, there were 365 data zones -95% of the total - that could access a public transport hub within an 800 metre walk from the PWC of the data zone. This primarily related to access to a bus stop.

By comparison, 5.2% of data zones did not have access to public transport in the terms described above.

Looking at key services, the most accessible are primary schools. These are accessible by public transport within 20 minutes by 91% of data zones (between 6:00am and 9:00am), followed by large food outlets, which 88% of data zones could access within 20 minutes (between 10:00am and 14:00pm).

More deprived areas had slightly better access to public transport than less deprived areas. The most deprived 20% of data zones had the highest percentage that could access primary schools (99%), GPs (96%), food outlets (97%), secondary schools (71%), railway stations (71%) and further education (43%) within twenty minutes.

Urban areas, and large urban areas in particular, tended to have better access to services than rural areas. In around 24% of remote rural areas, there was no access to public transport, as was the case in around 18% of accessible rural areas (compared to around 1% of data zones in large urban areas).

Journey Times to Areas of Employment

To demonstrate journey times – via walking and public transport – to areas of employment, Transport Scotland commissioned bespoke analysis for the baseline report on the number of jobs in and journey times to key employment destinations via public transport from the PWC of each data zone in Scotland. To provide an estimate of access to employment, jobs have been identified via the Business Register and Employment Survey (BRES). Data zones which contain 50% of the total employment have been identified as the key employment destinations within each local authority. This analysis has not been replicated for this update report as it is unlikely the results will have changed significantly since the baseline due to the way the data is gathered for this indicator. The full analysis and technical note for this indicator can be found in the baseline National Transport Strategy Monitoring and Evaluation baseline report but a summary is provided below.

Between 6am and 10am, a mean of 27,387 jobs were available via employment sites across all data zones within half an hour via public transport. A mean of 115,797 jobs were available within one hour via public transport.

Between 10am and 2pm, a mean of 22,834 jobs were available via employment sites in employment destinations across all data zones within half an hour via public

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transport. A mean of 108,750 jobs were available within one hour via public transport.

Between 6am and 10am, a mean of 427,704 jobs were available via employment sites across all data zones within two hours via public transport. Between 10am and 2pm, a mean of 426,145 jobs were available within two hours via public transport.

Improves Our Health and Wellbeing

Proportion of Short Journeys Made by Active Travel

Looking at journeys under two miles in 2023, 52% of all trips were made by active modes. Of all journeys made under two miles, 51% were by walking and 2% were by cycling. These figures are higher than in 2019, when 49% of trips were made by active modes.

In a similar pattern to 2019, those on the 30% of lowest incomes made 57% of these journeys by active modes, compared to 49% of those in the highest 30%. Among the younger age groups, 20–29-year-olds made 62% of their trips by active modes, compared to 43% of those aged 80+.

Looking at journeys under 5 miles, 39% of all trips were by active modes. Of these trips, 37% were by walking while 2% were by cycling. These figures are higher than in 2019, when 35% of trips were made by active modes.

In 2023, a higher percentage of journeys under 5 miles were made using active travel modes by people in the lowest 30% of the income distribution (45%) compared to the highest 30% (35%). Among men, 40% of the journeys under five miles were made by active modes, compared to 38% of the journeys made by women. Travel by active travel modes also varies in terms of age, with those aged 20-29 making 54% of their journeys by active methods, compared to 38% of those aged 50-59.

Transport Casualties and Accidents by Exposure and by km Travelled by Mode

Overall Casualties

In 2023, there were 5,788 overall casualties. This is 25% lower than in 2019. These included:

- 3,703 slight injuries, 1,240 less that in 2019;
- 1,930 serious injuries, 455 less than in 2019; and
- 155 deaths nine less than in 2019.

Among adults (aged 16 and over), this was 5,207 overall. This included:

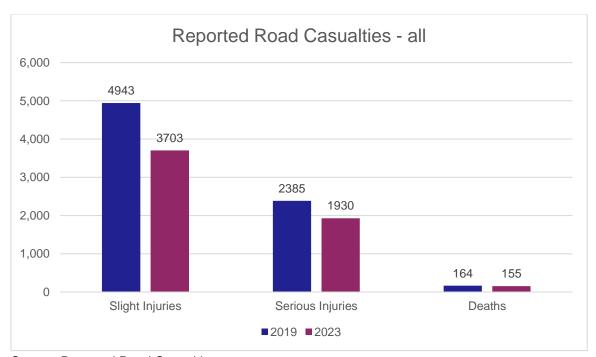
- 3,302 slight injuries
- 1,755 serious injuries
- 150 deaths

Among children (aged 0-15) this was 578 overall, 191 less than in 2019. This included:

- 398 slight injuries
- 175 serious injuries
- 5 deaths

Figure 11 below shows reported road casualties by severity for 2019 and 2023.

Figure 11: All Reported Road Casualties 2023 vs. 2019



Source: Reported Road Casualties

By Geography

As in 2019, overall casualties in 2023 were highest in Glasgow City, at 725, and lowest in the three island Local Authorities. In 2023, the Orkney Islands had the lowest number of casualties, at 13.

In 2019, Highland and Fife, had a relatively high number of deaths, and this was the case again in 2023 (both 14). However, Glasgow had the highest number of deaths, at 15.

However, there is a slightly different pattern per capita.

As in 2019, casualties in 2023 were highest in Argyll & Bute, at 1.93 casualties per 1,000 people (170 total casualties from 87,920 people).

Fatalities were also highest in this area, at 0.1 fatalities per 1,000 people (10 fatalities out of the population above).

By SIMD decile of the person involved

As in 2019, in 2023 casualties generally increased with deprivation decile of person involved. Overall casualties were highest among those who lived in the most deprived 10% of areas in Scotland and were lowest among those in the least deprived 10%.

As in 2019, this broad relationship held for different types of road users. The key exception was once again pedal cyclists, who had the highest number of adult casualties amongst those living in the 10% least deprived areas.

By SIMD decile of the location of the accident

When looking at the SIMD decile of the location where the accident occurred, the trend is more complex. As in 2019, when looking at pedestrians, there appears to be a consistent association between deprivation and volume of casualties. However, as in 2019, when it comes to casualties associated with motor vehicle drivers/passengers, the link between the deprivation of the location and the volume of casualties is less clear, and the most deprived locations are not always those associated with the greatest number of casualties. These figures exclude those casualties where the age of the person involved is unknown.

By Demographic

As in 2019, casualties were more common among men then among women in 2023. In 2023, there were 1,327 killed or seriously injured casualties among men and 757 among women. Looking at deaths specifically, in 2023, 112 men died compared to 43 women.

As in 2019, casualties for all severities peaked among those aged 30-39 in 2023, at 567 men and 361 women.

By Mode

As in 2019, the greatest number of casualties was experienced by those in cars in 2023 (3,385 casualties overall). In this year, there were 2,428 slightly injured, 896 seriously injured and 61 killed using this mode.

Among pedestrians in 2023, there were 939 casualties overall, with 429 slight injuries, 463 serious injuries and 47 fatalities. Among pedal cyclists, there were 404 overall casualties, with 239 slight injuries, 158 serious injuries and 7 fatalities.

By Distance

Using distance travelled by modes in Scotland, provided by the Department for Transport, we can estimate the number of accidents by kilometre travelled on each mode. However, it should be noted that, given the nature of the data collection, the figures for pedal cycles are unlikely to be as precise as those for motor vehicles. As a result, statistics should be treated with caution.

Patterns are similar to those previously reported for 2019. In 2023, per million kilometres travelled in a car, there were 0.10 casualties. By contrast, the highest number of casualties was associated with motorcycles (1.58 per million kilometres) and pedal cycles (1.01 per million kilometres).

Regarding fatalities, these were also highest for motorcycles, at 0.09 per million kilometres.

Perceptions of Safety of Public Transport and Active Modes

Walking

Within the data provided by the Scottish Household Survey, 1% of the population cited 'not safe' as a barrier to walking more frequently than they do. This proportion has remained consistent since 2012, with the question being asked in 2019, 2021 and 2023. Because the sample size of the those providing this answer was so low, a breakdown by demographics is not available.

However, it is worth noting that the Scottish Crime and Justice Survey collects data on the proportion of adults that felt safe walking alone in their local area. This survey notes that, in 2021-22, 76% of respondents felt safe in this context. This is similar to

the figures for 2019-20 (77%). More specifically, 63% of women felt safe, compared to 90% of men.

In addition, 59% of those in the 15% most deprived areas felt safe compared to 79% of those in the rest of Scotland (reported in the data tables accompanying the survey).

Cycling to Work

Within the data provided by the Scottish Household Survey, there were two answers to the question asking for 'Reasons why do not cycle to work' that relate to personal safety. These are 'Concerns about cycling in traffic' and 'Concerns for personal safety on dark/lonely roads'. This data has been disaggregated in a bespoke breakdown provided for this report.

In relation to concerns about traffic, this was reported by 17% of respondents in 2023. Although this was slightly higher among women (18%) than among men (16%) the difference was not statistically significant.

In relation to concerns about personal safety on dark/lonely roads, this was reported by 7% of respondents in 2023. This was similar for women and men (both 7%).

Bus

In 2021, perceptions of safety were higher during the day than in the evening. During the day, 95% of bus users agreed they felt safe and secure using the bus. By contrast, 70% agreed that they felt this way using the bus in the evening, while 11% disagreed. This is similar to the baseline position in 2019.

Looking at specific groups:

Disagreement with feeling safe and secure during the evening was higher among women, at 15%, compared to 5% among men. It was also higher among disabled people (at 21%) compared non-disabled people (at 7%).

Disagreement was also higher among those in the lowest 30% of incomes, at 14%, compared to those in the highest 30% of incomes, at 8%.

Additional survey research, undertaken by Transport Focus on behalf of Transport Scotland in 2023, reports that 87% of bus users rated their personal security whilst on the bus as being fairly or very good.

Train

In 2023, among those who had used the train in the last month, 96% agreed that they felt safe and secure using the train during the day. By contrast, 80% agreed that they felt this way during the evening, while 8% disagreed. This is broadly similar to the baseline position though there has been in an increase in the proportion of people agreeing that they feel safe and secure using the train in the evening from 2019 (76%).

Disagreement was higher among women compared to men (13% compared to 5%) and among disabled people compared to non-disabled people (15% compared to 7%).

Case Study: Women and Girls' Safety

In 2022, Transport Scotland undertook a programme of research on the issue of women and girls' safety on public transport.

The substantive component of research was a qualitative study with women and girls who use and/or work on the public transport system in Scotland.

The study reported that as with growing international literature on this issue, safety on public transport was a significant concern for women and girls in Scotland. The study highlighted that women and girls are already shouldering significant responsibility for adapting their behaviours to try to 'be' and to 'feel' safe when travelling on public transport.

The study highlighted a range of issues that were relevant and impacted on women and girls' safety including mode of travel; timing of travel and travel routes; reliability of transport; antisocial behaviour, often exacerbated by alcohol and drug use; unwanted attention, often of a sexual nature; how age, gender and race can compound issues regarding safety; and a perceived lack of support and action to deal with and follow up on incidents where women and girls felt unsafe.

The report made 10 recommendations to improve safety for women and girls on the transport network in Scotland. These ae now being

taken forward by Transport Scotland, transport mode operators and relevant stakeholder organisations.

Air Quality

This section considers the two primary air pollutants referenced in the National Transport Strategy, Nitrous Oxide (NOx) and Particulate Matter (primarily PM 10 and PM 2.5). The data comes from the 'Environment and Emissions' chapter of the Scottish Transport Statistics Report no. 42 (2023 edition). The difference between PM 10 and PM 2.5 relates to their size, with PM 10 being sized 10 microns and below and PM 2.5 being 2.5 microns and below.

It should be noted that the data does not exhaust the available data on air pollution and air quality monitoring. Further data on these can be found in the links above.

Nitrogen oxides (NOx)

In 2021, 59% of all NOx emissions were from transport, which is a decrease from 2019 when transport comprised 64% of overall emissions. However, this is in a context where both overall and transport related emissions have declined by 75% and 68% respectively since 1990.

Looking at road transport, the relative components of this have changed over time. In 1990, road transport represented 70% of transport emissions, while shipping represented 26%. In 2021, road transport constituted 36% of all transport emissions, while shipping constituted 60%. This is similar to the corresponding 2019 baseline figures that are 37% and 58% respectively.

Particulate Matter (PM 10)

Overall transport related PM 10 emissions have fallen from 7 thousand tonnes in 1990 to 2.1 thousand tonnes in 2021. In 2021, transport related emissions accounted for 17% of all PM 10 emissions, down from 20% in 2019, and the same proportion that was reported in 1990.

Emissions associated with road transport, as a percentage of emissions associated with total transport, increased from 43% in 1990 (when shipping was 53%) to 69% in 2019, and 74% in 2021 (when shipping was 24%). In 2021, in terms of specific components of road transport, 43% was related to tyre and brake wear and 19% was related to road abrasion.

Particulate Matter (PM 2.5)

In 2021, 22% of total PM 2.5 emissions came from transport, compared to 23% in 1990 and 27% in 2019. In absolute terms, however, transport related PM 2.5 emissions fell from 6.4 thousand tonnes in 1990 to 1.9 thousand tonnes in 2019 and 1.5 thousand tonnes in 2021.

Road transport as a component of transport emissions increased from 40% in 1990 (when shipping was 56%) to 60% in 2019 (shipping was 35%), and 65% in 2021 (shipping was 32%). In terms of the specific components of road transport, in 2021, 34% of the total was a result of tyre and brake wear and 14% was a result of road abrasion.

Travel for Recreation/Leisure

Looking at journeys by purpose, 33% of travel is for recreation/leisure, compared to 67% of travel that be characterised as non-leisure.

Leisure travel here includes visiting friends or relatives (10%), going for a walk (10%), sports/entertainment (7%), eating/drinking (4%) and holidays/days trips (1%). Collectively, the proportion of journeys for recreation/leisure has increased since 2019 (from 28% to 33%).

By contrast, non-leisure activities include shopping (24%), commuting/journey in the course of work (21%), going home (6%), education (5%), other personal business (4%), business (3%), visiting hospital or other health reasons (2%) or 'other' journeys (2%). Collectively, the proportion of journeys for non-leisure activities has decreased since 2019 (from 72% to 67%)

There are a range differences by group. Some of the most prominent included:

Gender - a larger percentage of men's trips involved commuting (23%) compared to women (19% of which were commuting). A larger percentage of women's trips were to education (6%) compared to men (3%).

Age - commuting is highest among 20–29-year-olds, at 28% of journeys, and is lower among those over 60 (14% of those aged 60-69, 2% of those aged 70-79). Education trips are most common among those aged 16-19, at 21%.

Disability - a lower proportion of the trips of disabled people involved commuting (11% compared to 24% of non-disabled people).

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Income - a higher proportion of trips of those in the highest 20% of incomes involved commuting (25%) compared to those in the lowest 20% of incomes (10%). By contrast, a higher proportion of those in the lowest 20% of incomes involved shopping (30%) compared to those in the higher 30% of incomes (20%).

Geography - a similar proportion of trips involved commuting in both urban and rural areas (21% in urban areas, 20% in rural areas). This differs from the baseline in 2019, when a higher proportion of the trips of those in urban areas involved commuting (24%, compared to 20% of trips of those in rural areas).

Annex A - Published Research and Evaluation Reports

The below is a list of Transport Scotland published research and evaluation material since the launch of the National Transport Strategy. This is not inclusive of all material published but contains links to key publications. Further publications are available on the <u>Transport Scotland website</u>.

Reported Road Casualties Scotland 2023 - Reported road casualties Scotland 2023 | Transport Scotland

In-depth Road Traffic Fatalities Report 2015-2020 - <u>In-Depth Road Traffic Fatalities</u> Report for the Years 2015-2020 - Full Report | Transport Scotland

Transport and Travel in Scotland 2023 - <u>Transport and Travel in Scotland 2023 |</u>
<u>Transport Scotland</u>

Scotrail Peak Fares Removal Pilot Final Evaluation - <u>ScotRail Peak Fares Removal Pilot - Final Evaluation Report - August 2024 | Transport Scotland</u>

Scottish Transport Statistics - Scottish Transport Statistics 2023 | Transport Scotland

Young Person's Free Bus Travel Scheme One Year Evaluation - <u>Year 1 evaluation - Young Persons' Free Bus Travel Scheme | Transport Scotland</u>

Disability and Transport - Disability and Transport 2021 | Transport Scotland

Final Summary Report STPR2 - <u>Final summary report - December 2022 - STPR2 | Transport Scotland</u>

Analysis of Responses to a Public Consultation on the Islands Connectivity Plan - Analysis report - Consultation on the Islands Connectivity Plan: Strategic Approach & Vessels and Ports Plan | Transport Scotland

Analysis of Smart and Integrated Ticketing Survey - <u>Smart and Integrated Ticketing</u> in Scotland - Analysis of the results of the 2023 survey | Transport Scotland

Analysis if Responses to a Public Consultation on the next Clyde and Hebrides Ferry Services Contract - <u>Analysis of responses to the public consultation for the next Clyde and Hebrides Ferry Services Contract - Analysis report | Transport Scotland</u>

Active Travel Framework Indicators Baseline Report - <u>Active Travel Indicators</u>
Report - <u>2019 Baseline Report | Transport Scotland</u>

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Best Practice in Active Travel Literature Review - <u>Literature review - Best practice in</u> active travel and its associated benefits | Transport Scotland

There's an App for That – Women's Safety on Public Transport - <u>"There's an app for that!"</u> - Women's Safety on Public Transport in Scotland | Transport Scotland

Women and Girls' View and Experiences of Personal Safety when Using Public Transport - Women's and girls' views and experiences of personal safety when using public transport | Transport Scotland

Disability Equality Scotland Accessible Travel Framework Review - <u>Disability</u>

<u>Equality Scotland: Accessible Travel Framework: Evaluation Research Project</u>

<u>Report | Transport Scotland</u>

Analysis of Responses to a Public Consultation on the Aviation Strategy - <u>Aviation Strategy - Analysis of consultation responses | Transport Scotland</u>

Evaluation of Free Bikes For School Age Children who Cannot Afford Them - <u>Evaluation of Free Bikes Pilots for School Age Children Who Cannot Afford Them -</u> Final Evaluation Report | Transport Scotland

Baseline Data Collection for Reston Rail Station - <u>Baseline Data Collection for Reston Rail Station | Transport Scotland</u>

Implementing Part Three of the Transport (Scotland) Act 2019: Bus Services – Consultation Analysis - <u>Implementing Part Three of the Transport (Scotland) Act 2019: Bus Services - Analysis of Consultation Responses | Transport Scotland</u>

Evaluation of Transport Scotland's Walking and Cycling Schools Programme - <u>Evaluation of Transport Scotland's Walking and Cycling Schools Programme</u>

COVID-19 – Trends in Transport and Travel in Scotland During the First Year of the Pandemic - COVID-19 - Trends in transport and travel in Scotland during the first year of the pandemic | Transport Scotland

COVID-19 Analysis Home Page - COVID-19 Analysis

Home Working Socioeconomic Analysis - <u>Home Working Socio-Economic Analysis:</u>
Research Findings | Transport Scotland

Transport Scotland Research Strategy 2021-2024 - <u>Transport Scotland Research Strategy 2021-24 | Transport Scotland</u>

National Transport Strategy Monitoring and Evaluation Strategy - <u>Monitoring and</u>
Evaluation Strategy - August 2021 - National Transport Strategy | Transport Scotland

National Transport Strategy Monitoring and Evaluation Report 2024 Transport Scotland

Transport and Child Poverty - Transport and Child Poverty | Transport Scotland

Analysis of Responses to the Public Consultation on Draft Guidance on Inclusive Design for Town Centres and Busy Streets - <u>Analysis of responses to the public consultation on draft guidance on inclusive design for town centres and busy streets | Transport Scotland</u>

Inclusive Design in Town Centres and Busy Street Areas - <u>Inclusive Design in Town</u>
<u>Centres and Busy Street Areas | Transport Scotland</u>

Development of Scotland's 2030 Road Safety Casualty Targets and Key
Performance Indicators - <u>Development of Scotland's 2030 Road Safety Casualty</u>
Targets and Key Performance Indicators | Transport Scotland



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