

# Strategic Transport Projects Review (STPR2) Consultancy Support Services Contract



## Initial Appraisal: Case for Change Highlands and Islands Region

February 2020

**Jacobs** **AECOM**



## STRATEGIC TRANSPORT PROJECTIONS REVIEW #2

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## List of Acronyms

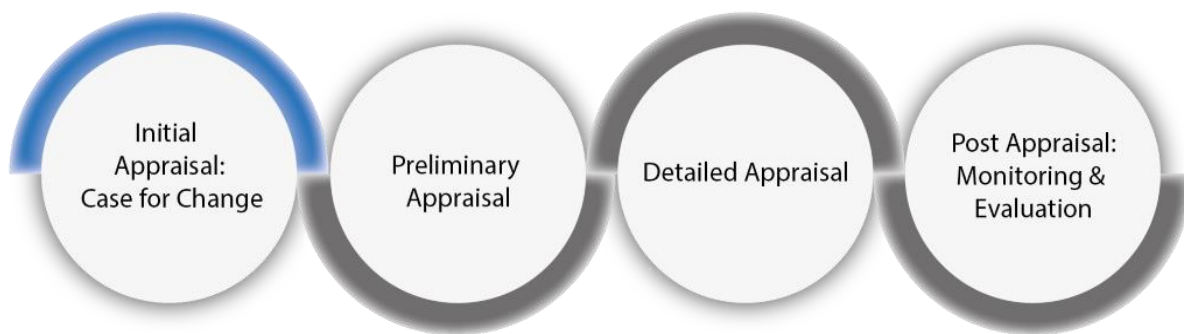
ABBREVIATION	
ADS	Air Discount Scheme
CNES	Comhairle nan Eilean Siar
CO2	Carbon Dioxide
CP6	Control period Six
CRWIA	Children's Rights and Wellbeing Impact Assessment
EqIA	Equality Impact Assessment
FSDA	Fairer Scotland Duty Assessment
GDP	Gross Domestic Product
GVA	Gross Value Added
HGV	Heavy Goods Vehicle
HAL	Highlands and Islands Aviation Limited
HIE	Highlands and Islands Enterprise
HITRANS	Highlands and Islands Transport Partnership
ICIA	Island Communities Impact Assessment
NC500	North Coast 500
NCN	National Cycle Network
NSA	National Scenic Area
NTS	National Transport Strategy
RET	Road Equivalent Tariff
SABI	Scottish Access to Bus Indicator
SAC	Special Area of Conservation
SCDI	Scottish Council for Development and Industry
SEA	Strategic Environmental Assessment
SIMD	Scottish Indicator of Multiple Deprivation
SPA	Special Protection Area
STAG	Scottish Transport Appraisal Guide
STPR	Strategic Transport Projects Review
TPO	Transport Planning Objective

# 1. Introduction

## 1.1. Background and Report Purpose

Transport Scotland is currently undertaking the second Strategic Transport Projects Review (STPR2) to inform the Scottish Government's transport investment programme in Scotland over the next 20 years (2022 – 2042). STPR2 takes a national overview of the transport network with a focus on regions and will help deliver the vision, priorities and outcomes that are set out in the new National Transport Strategy (NTS2)<sup>1</sup>.

STPR2 is being carried out in accordance with the Scottish Transport Appraisal Guidance (STAG)<sup>2</sup> which is an objective-led, evidence-based transport appraisal process. The four key phases of STAG are illustrated in Figure 1.



**Figure 1: The four key phases of the Scottish transport appraisal guidance**

This report sets out the *Initial Appraisal: Case for Change* for the Highlands and Islands region as shown in **Figure 2** and forms one of eleven STPR2 regions. The Case for Change constitutes the first phase of STAG and sets out the evidence base for problems and opportunities linked to the strategic transport network across the Highlands and Island region drawing on relevant data analysis, policy review and stakeholder engagement. This report is supported by a national level Case for Change report which sets out the overarching vision for transport investment in Scotland and the challenges that must be addressed to support delivery of the priorities set out in NTS2.

STPR2 specifically focusses on Scotland's key strategic transport assets, which are wide ranging and varied. In the context of STPR2, the strategic transport network is defined as being:

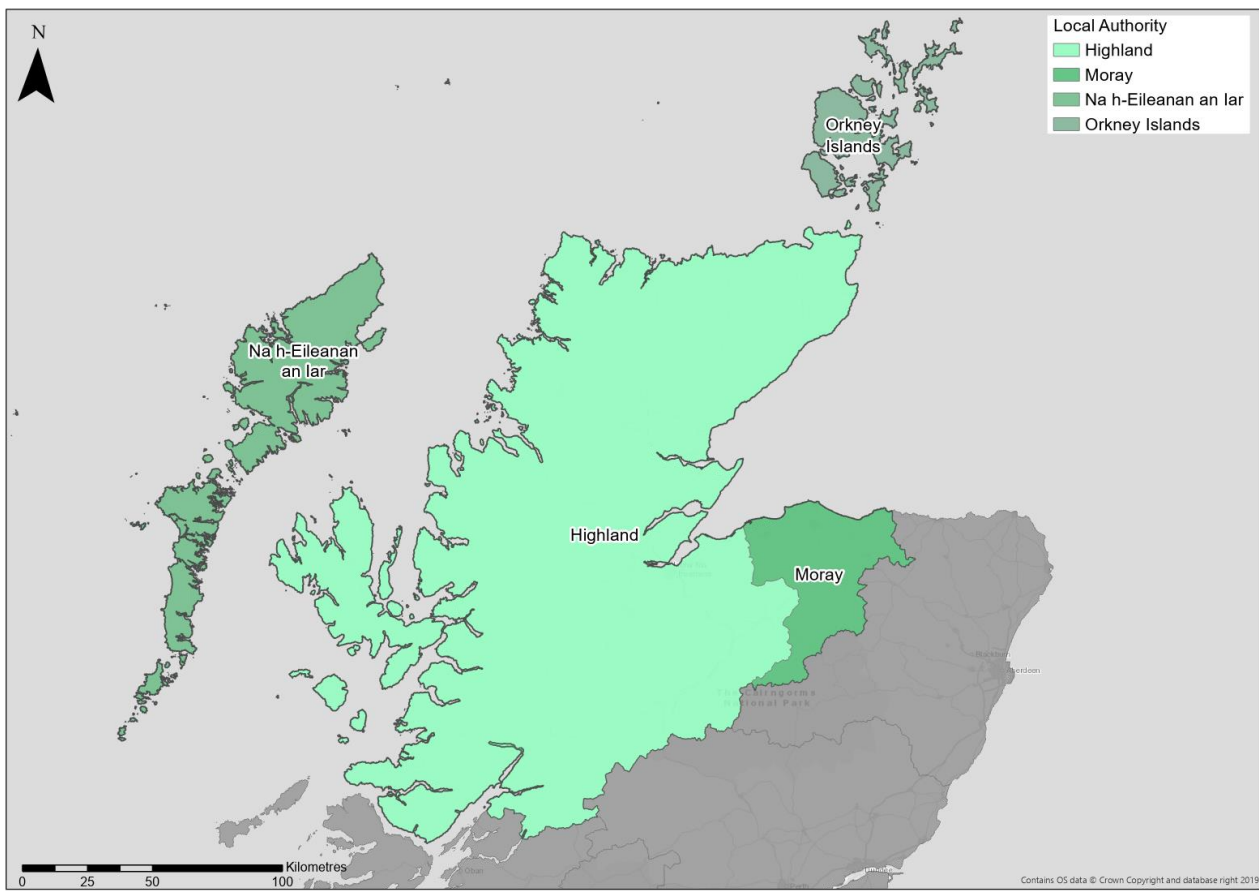
- All transport networks and services owned, operated and funded directly by Transport Scotland;
- Transport Access to Major Ports and Airports; and
- The inter-urban bus and active travel network and principal routes within the City Region areas.

<sup>1</sup> New National Transport Strategy (NTS2) (Transport Scotland, Feb 2020)

[www.transport.gov.scot/media/47052/national-transport-strategy.pdf](http://www.transport.gov.scot/media/47052/national-transport-strategy.pdf)

<sup>2</sup> Scottish Transport Appraisal Guidance (STAG) (Transport Scotland)

[www.transport.gov.scot/media/41507/j9760.pdf](http://www.transport.gov.scot/media/41507/j9760.pdf)



**Figure 2: Highlands and Islands Study area**

(Click image to enlarge figure)

The Highlands and Islands region comprises the four local authorities of Highland, Comhairle nan Eilean Siar (CNES), Moray, and Orkney. The region has a wide-ranging transport network comprising active travel routes, airports and ferry connections to and between the islands, rail lines and stations, the trunk road network, as well as air and ferry ports.

To reflect the regional approach of STPR2, a Regional Transport Working Group (RTWG) has been established with representatives from the four local authorities (The Highland Council, CNES, Moray Council, and Orkney Islands Council), HITRANS, Transport Scotland, the STPR2 consultant team and other regional partners.

This Case for Change report also presents a draft set of Transport Planning Objectives (TPOs), aligned with the national STPR2 objectives. The TPOs express the outcomes sought for the region and describe how problems may be alleviated. Additionally, the TPOs provide the basis for the appraisal of alternative options and, during Post Appraisal, will be central to Monitoring and Evaluation.

A long list of multi-modal options to address the identified problems and opportunities in the study area is currently being developed and will be sifted in line with the proposed approach presented in this report.

Subsequent phases of the STAG process, the Preliminary and Detailed Appraisal phases, involve more detailed appraisal work, considering the feasibility and performance of



options to tackle the identified transport related problems and opportunities and will be developed as the STPR2 process moves forward.

The following Chapter sets out the Socio-Economic, Environmental and Transport Context for the Highlands and Islands region.



## 2. Context

### 2.1. Policy Context

At the national, regional and local levels, relevant transport, planning and economic strategies and policies have been reviewed to provide background context against which this Case for Change study is being undertaken. Figure 3 provides an overview of the strategies and policies reviewed, with a summary of key documents presented below.

- **Programme for Government:** sets out the Scottish Government’s ambitions and aims to make Scotland a more successful country with opportunities for increased wellbeing for all. It includes a commitment to “Make the Highlands and Islands the world’s first net-zero aviation region by 2040.”
- **New National Transport Strategy (NTS2):** The NTS2 provides the national transport policy framework, setting out a clear vision of a sustainable, inclusive, safe and accessible transport system which helps deliver a healthier, fairer and more prosperous Scotland for communities, businesses and visitors. It sets out key priorities to support that vision: reduces inequalities; takes climate action; helps deliver inclusive economic growth; and improves our health & wellbeing.
- **Climate Emergency:** declared by the Scottish and UK Governments and multiple local authorities, including The Highland Council, Moray Council and Orkney Islands Council. As part of this, the Climate Change Bill commits the Scottish Government to a target of net zero emissions of all greenhouse gases by 2045.
- **Growth and City Region Deals:** The Scottish Government, the UK Government and regional partners have agreed funding for £315 million as part of the Inverness and Highland City-Region. The Scottish Government is committed to ensuring 100% coverage of Scotland with Growth Deals. Scotland’s three islands authorities - Shetland Islands Council, Orkney Islands Council and Comhairle nan Eilean Siar - are currently working with partners to develop The Islands Growth Deal.
- **HITRANS’ Regional Transport Strategy:** which sets out the strategic direction and outcomes to be achieved over its lifespan to 2022, with a focus on “a prosperous economy and on inclusive, connected and healthy communities.”
- **Local Transport Strategies:** which set out the strategic direction and outcomes to be achieved in The Highland Council, Moray Council and Orkney Council local authority areas over the lifespan of each strategy.
- **Regional and Local Policy Documents:** This includes Local Transport Strategies as well as non-transport specific plans, such as Local Development Plans and Economic Strategies, which transport improvements play a key role in both the enabling and delivery of their outcomes.

In addition to the four Priorities set out above, the NTS2 supports the adoption of a Sustainable Travel Hierarchy, which promotes walking, wheeling, cycling, public transport and shared transport options in preference to single occupancy private car use, as well as a Sustainable Investment Hierarchy, which prioritises investment aimed at reducing the need to travel unsustainably and maintaining and safely operating existing assets ahead of new infrastructure investment.



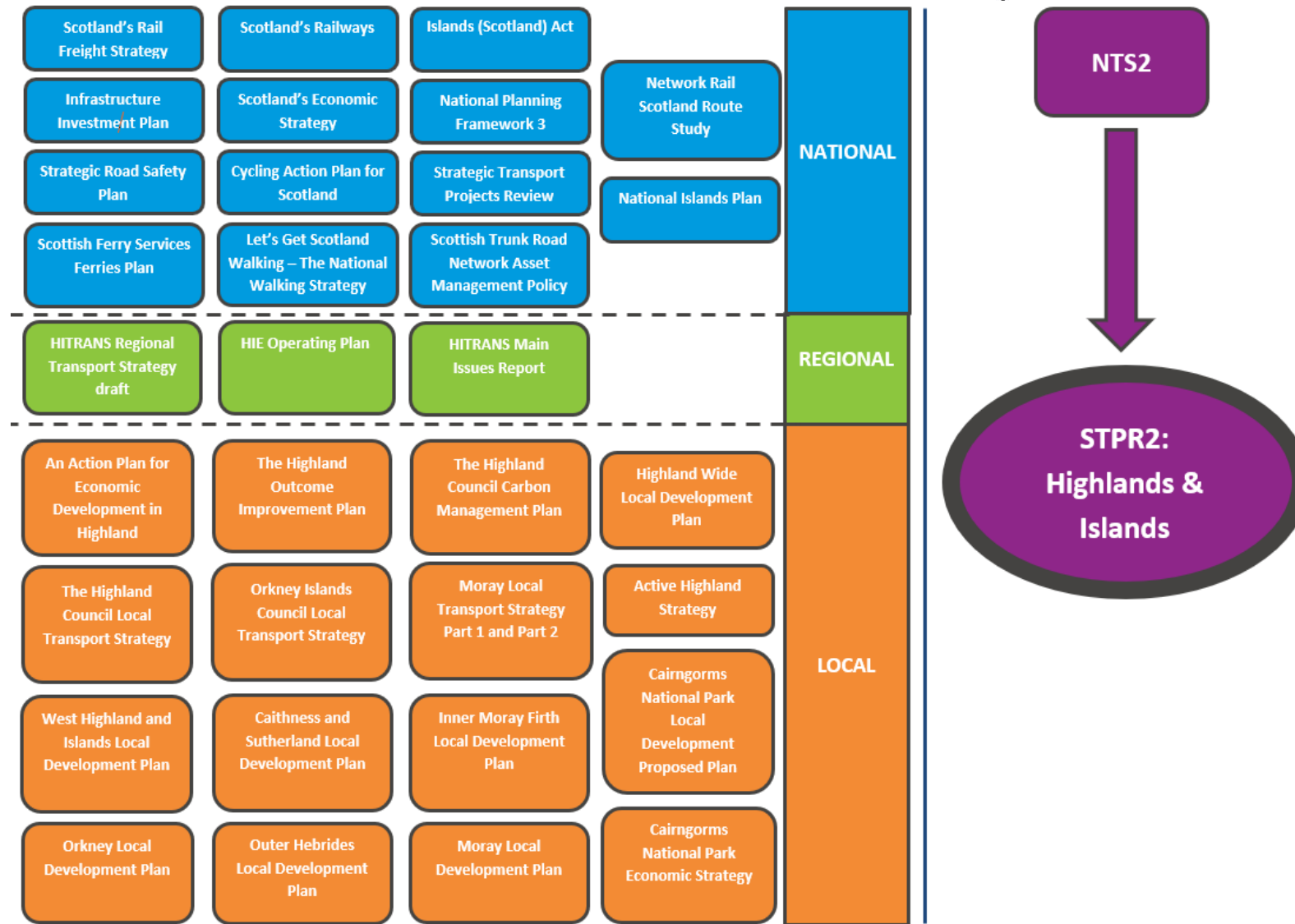


Figure 3: Policy Review



The full list of documents reviewed is presented in **Appendix B**.

In addition, supporting the development of STPR2, a Strategic Environmental Assessment (SEA), an Equality Impact Assessment (EqIA), a Children's Rights and Wellbeing Impact Assessment (CRWIA), a Fairer Scotland Duty Assessment (FSDA) and an Island Communities Impact Assessment (ICIA) are being undertaken. Early work on these assessments has informed this Case for Change.

## 2.2. Geographical Context

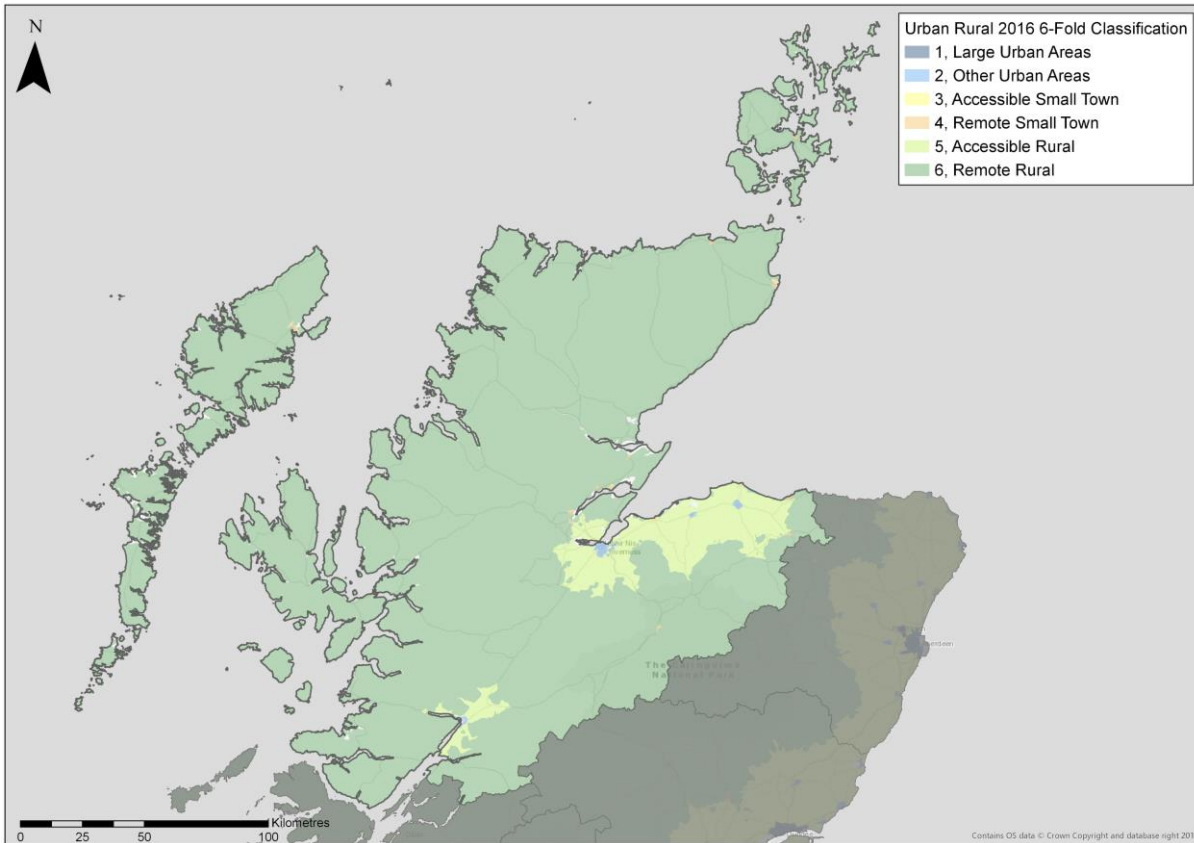
The majority of the Highlands and Islands region is classified as remote rural. Figure 4 shows the Urban Rural 2016 6-Fold Classification<sup>3</sup>. The 6-fold classification consists of the following; the proportion of the regional population residing in each classification is presented in brackets<sup>4</sup>:

- Large Urban Areas (0%)
- Other Urban Areas (29%)
- Accessible Small Towns (5%)
- Remote Small Towns (18%)
- Accessible Rural (13%)
- Remote Rural (35%)

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<sup>3</sup> Scottish Government. 6-fold Urban Rural Classification. Further details available at: <https://www2.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification>

<sup>4</sup> Based on Mid year Population Estimates 2018 (National Records of Scotland) <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates>



**Figure 4: Urban-Rural 2016 Scottish Government 6-Fold Classification**

(Click image to enlarge figure)

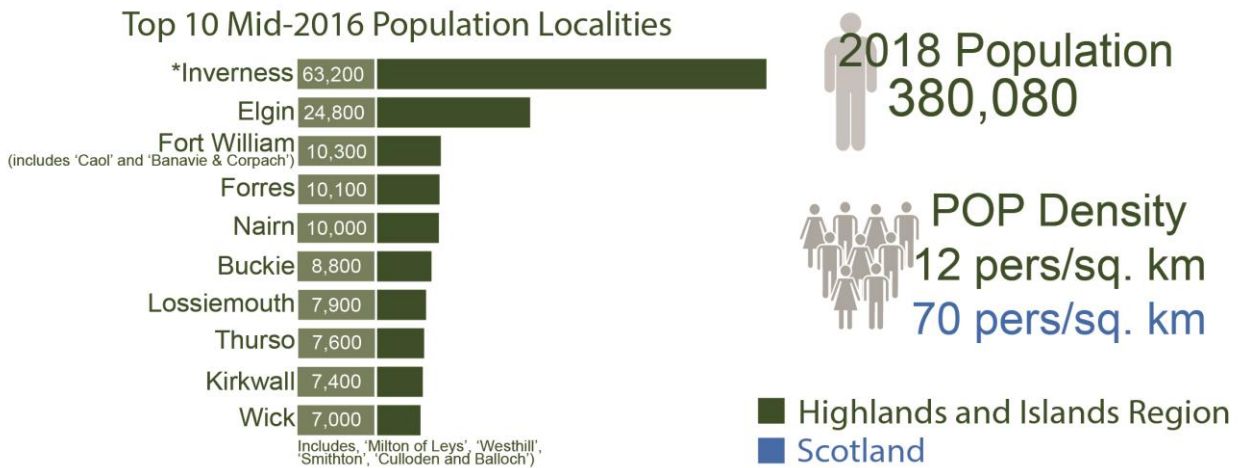
## 2.3. Socio Economic Context

### 2.3.1. Population

In 2018, the Highlands and Islands region had an estimated population of 380,080 people<sup>5</sup>, of which 62% lived within The Highland Council local authority area. The region has the lowest population density (12 persons per square kilometre) in Scotland when compared to the national average (70 persons per square kilometre)<sup>6</sup>, however this varies across the local authorities within the region.

<sup>5</sup> Mid year Population Estimates 2018 (National Records of Scotland) <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates>

<sup>6</sup> Census 2011 (Scotland) <https://scotlandscensus.gov.uk/>



**Figure 5: Highlands and Islands Largest Settlements by Population 2016, 2018 Population and Population Density**

Figure 5 presents the top 10 settlements by population. The most populated settlement in the Highlands and Islands region is Inverness, with a population of around 63,000 in 2016. Of the other local authority areas in the region, the most populated settlements are Elgin, Stornoway and Kirkwall<sup>7</sup>.

Of the top 10 most populous settlements in the region, seven increased in population between 2012 and 2016. Thurso, Fort William and Wick reduced in population size. The largest population growth was Elgin (+8%) and the largest decline in Thurso (-2%) as shown in Figure 6<sup>8</sup>.

<sup>7</sup> Population Estimates for Settlements and Localities in Scotland, Mid 2016 (National Records of Scotland) <https://www.nrscotland.gov.uk/files//statistics/settlements-localities/set-loc-16/set-loc-2016-publication-updated.pdf>

<sup>8</sup> Population Estimates for Settlements and Localities in Scotland, Mid 2016 (National Records of Scotland) <https://www.nrscotland.gov.uk/files//statistics/settlements-localities/set-loc-16/set-loc-2016-publication-updated.pdf>

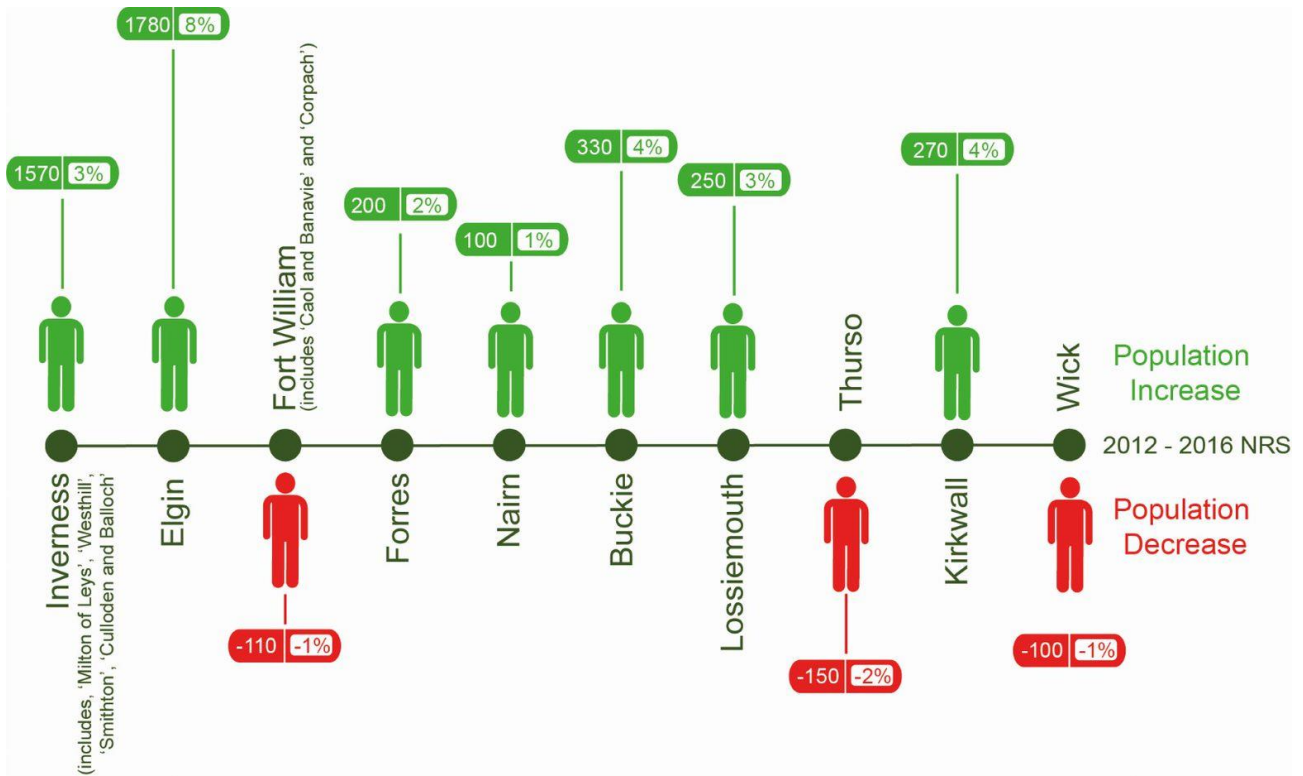


Figure 6: Top 10 Settlements Population Change

Within the more remote areas of the Highlands and Islands region, population decrease is regarded a major issue. Between 2011 and 2018 the population of Caithness and Sutherland (-3.9%), Eilean Siar (-3.1%), and Argyll & Bute (-3%) all decreased<sup>9</sup>.

Overall, the population in the region is slightly older than comparable rural areas<sup>10</sup>. Relative to the national average, the percentage of the working age population is 3.1% lower, while the percentage of the population aged 65+ is 3.4% higher<sup>11</sup>. The population aged 65+ is increasing in the region, particularly on the islands, where the percentage of population aged 65+ increased by 18.3% between 2011<sup>12</sup> and 2018<sup>13</sup>.

While the extent of the increase in over 65s varied across the region, the most marked changes between 2011 and 2018 were in Orkney (+23%), Lochaber, Skye and Wester Ross (+21%), and the Inner Moray Firth (+21%). At the same there has been a decline in the working age population, most apparent in the Eilean Siar (-8%) and Caithness and Sutherland (-8%). In 2018, the working age population of the Eilean Siar (58%), Caithness and Sutherland (58%), Lochaber, Skye & Wester Ross (60%) and Orkney (60%) are all lower than the Highlands and Islands region (62%) and Scotland as a whole

<sup>9</sup> Commission for Highlands and Islands, Population Change Analysis.

<sup>10</sup> The 'Regional' Benchmark used for the purposes of comparison for the Highlands and Island region is based on the average of the representative rural local authorities of Perth & Kinross, Aberdeenshire, Highland, Scottish Borders, Dumfries & Galloway and Moray.

<sup>11</sup> Census 2011 (Scotland) <https://scotlandscensus.gov.uk/>

<sup>12</sup> Census 2011 (Scotland) <https://scotlandscensus.gov.uk/>

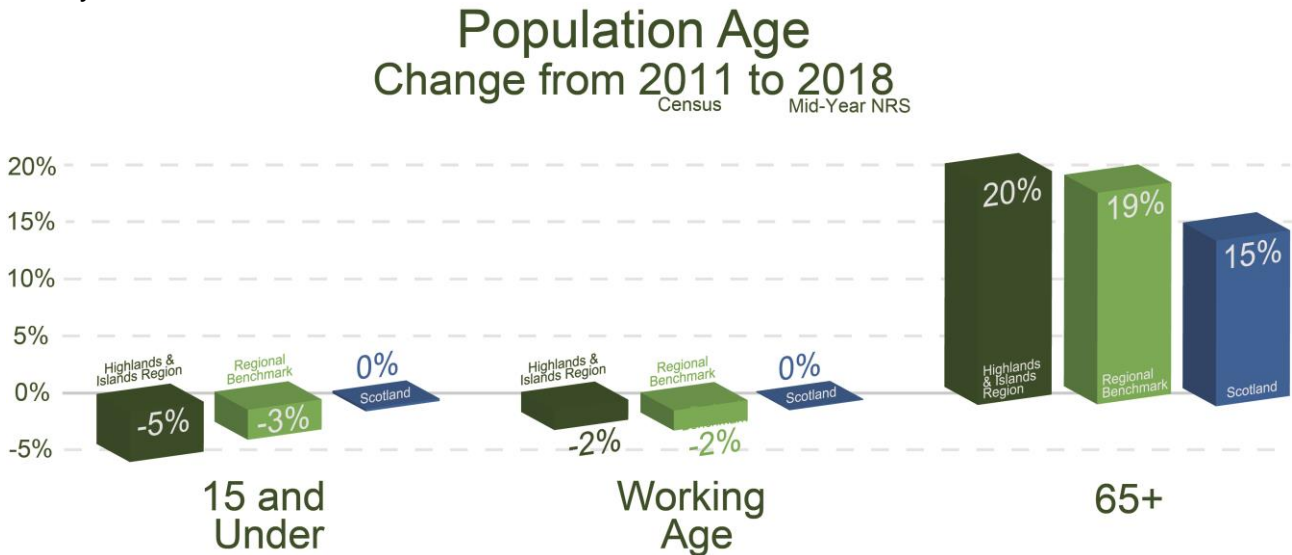
<sup>13</sup> Population Estimates 2018 (National Records of Scotland)

<https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates>



(65%)<sup>14</sup>.

All local authorities in the region saw a minor increase in net migration ranging from 0.5% in The Highland Council and Orkney Islands Council areas to 0.2% experienced in Moray<sup>15</sup>.



**Figure 7: Population Age Structure Comparison – 2011 to 2018**

A comparison of the region’s population by age in 2011 and 2018 are presented in Figure 7. The figure demonstrates that the working age population is decreasing in the Highlands and Islands, whilst it remains stable in Scotland as a whole. There has also been a significant decrease in the number of people aged 15 and under within the region, and a significant increase in those ages 65 and over. This shows the ageing population in the region, and indicates that the working age population is set to decrease further in future.

### 2.3.2. Travel to Work – Mode Share

In the Highlands and Islands region, a high proportion of people work from home (15%), which is 4% higher than the national average. Levels of walking and cycling are also higher than the national average, as shown in Figure 8, overleaf. Levels of commuting trips made by car are in line with national average at 62% although rates of car ownership are higher than the national average.

Figure 9, overleaf, shows that 80% of households have access to one or more cars, compared to 69% nationally<sup>16</sup>. This reflects the rurality of the region and the longer travel distances required to access key services, such as medical facilities and for social and leisure purposes, thereby increasing the need to own a vehicle

<sup>14</sup> Commission for Highlands and Islands, Population Change Analysis.

<sup>15</sup> Census 2011 (Scotland) <https://scotlandscensus.gov.uk/>

<sup>16</sup> Census 2011 (Scotland) <https://scotlandscensus.gov.uk/>



## Mode Share - Travel to Work 2011

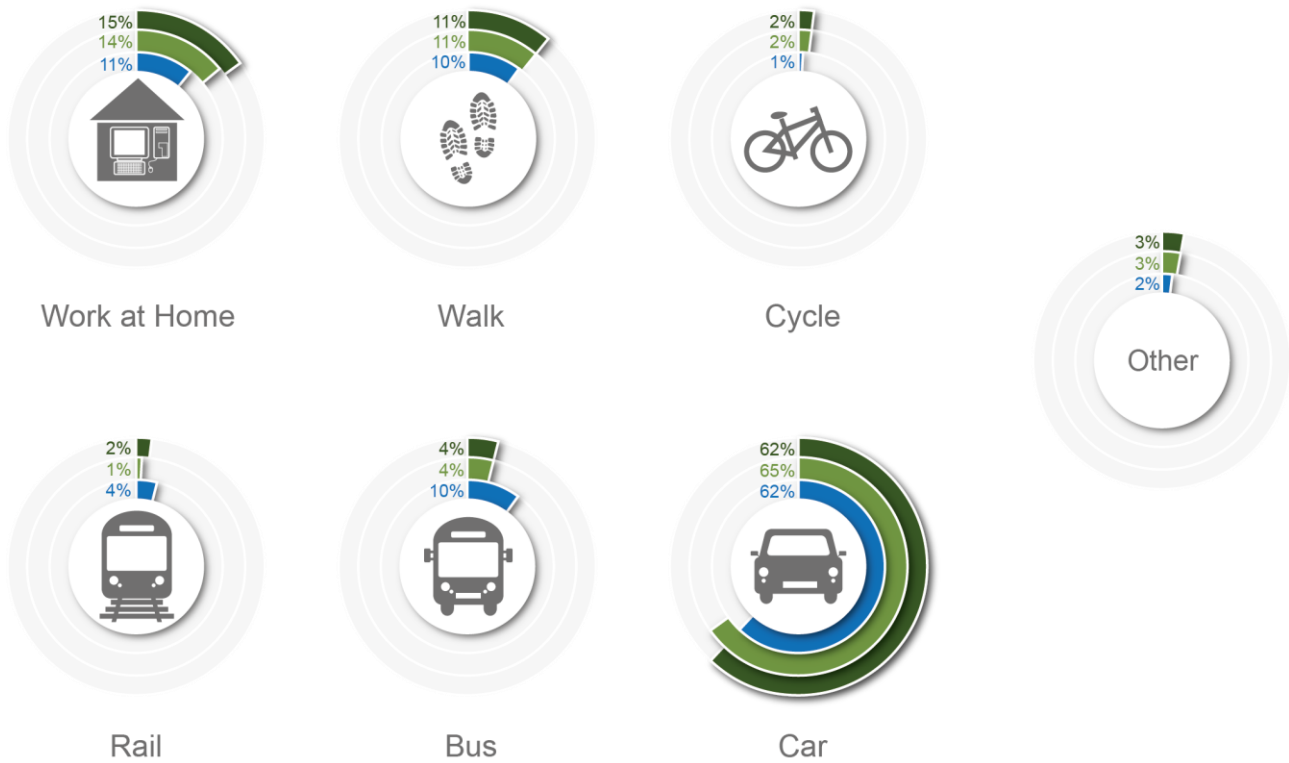


Figure 8: Travel to Work Mode Share

## Car or Van Availability per Household 2011

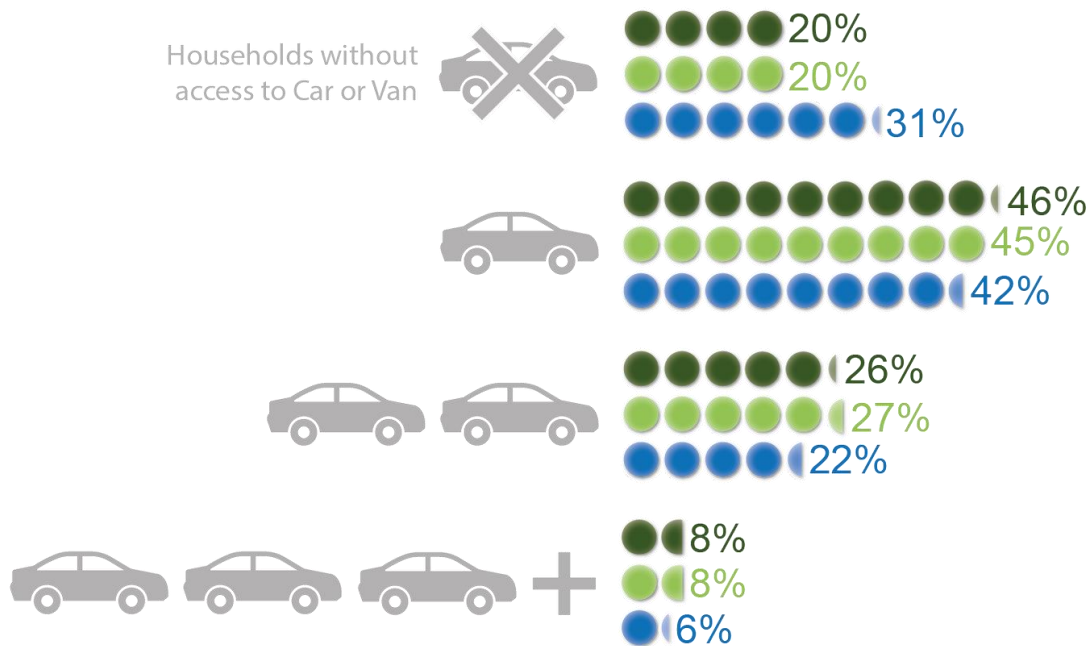


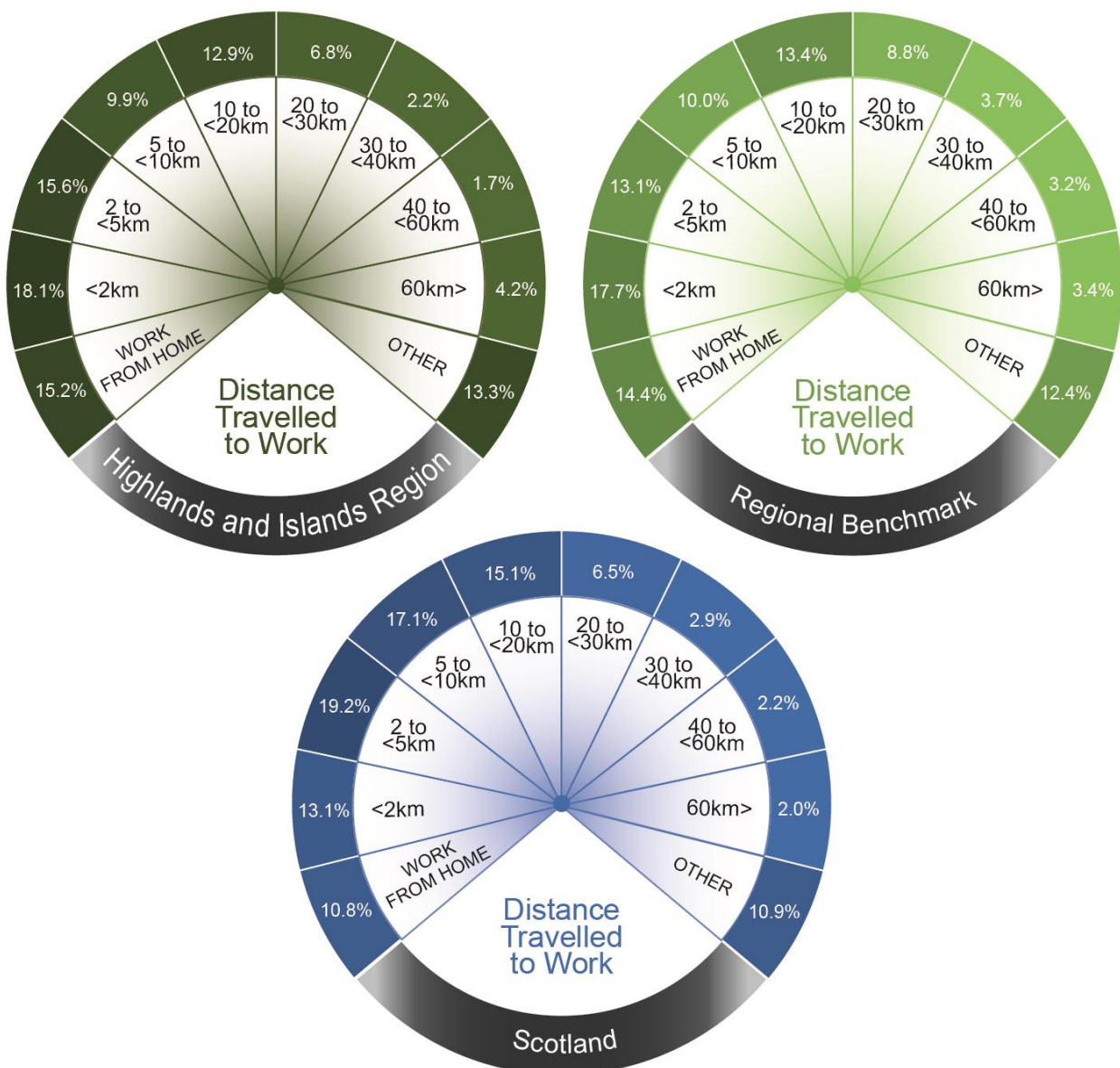
Figure 9: Car Ownership



**2.3.3. Travel to Work – Distance Travelled**

The proportion of people who travel to work between 2km and 5km, 5km and 10km, and 10km and 20km was significantly lower than the national average; 3.6%, 7.2% and 2.2% respectively. Travel to work distances of 20km to 30km, 30km to 40km, and 40km to 60km in the region are comparable with the national average, at 0.3% lower, 0.7% higher, and 0.5% higher respectively. Very long travel to work distances of more than 60km made up a higher proportion for the Highlands and Islands region at 13.3% compared to the national average at 10.9%, as shown in Figure 10<sup>17</sup>.

# Distance Travelled to Work 2011



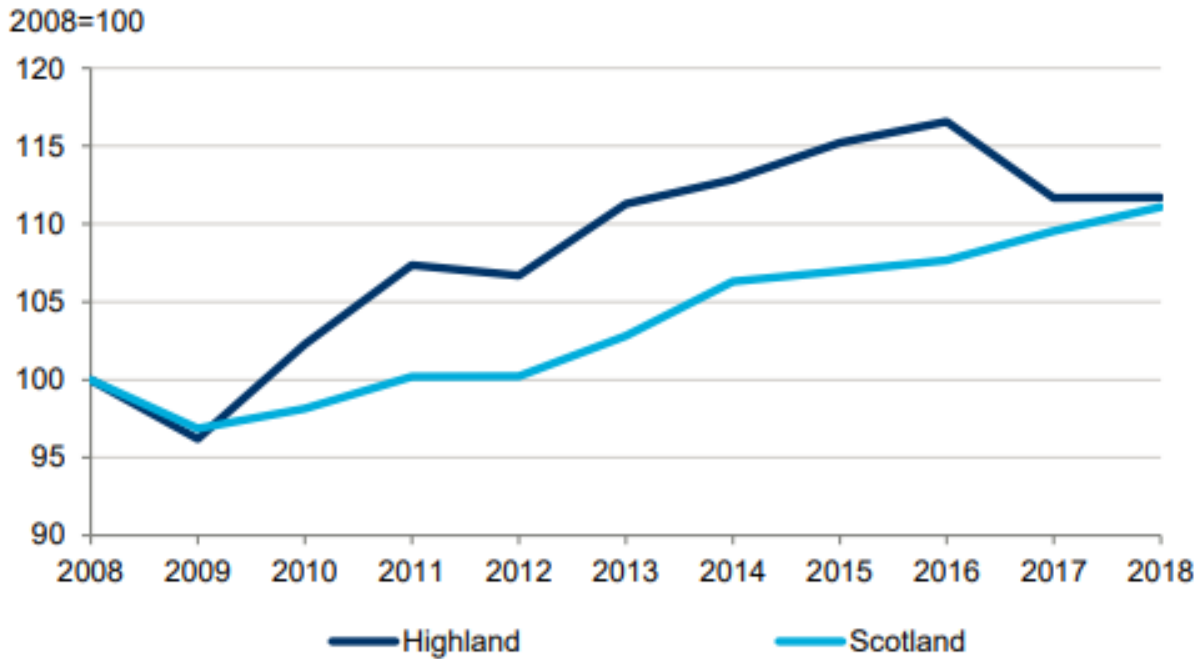
**Figure 10: Distance Travelled to Work**

<sup>17</sup> Census 2011 (Scotland) <https://scotlandscensus.gov.uk/>



**2.3.4. Economic Activity**

In economic terms, the Highlands<sup>18</sup> economy has grown in line with Scotland as a whole over the past decade (2008-2018), as shown in Figure 11<sup>19</sup>. However, the growth profiles are distinctly different, suggesting the region’s economic drivers differ to those of Scotland as a whole. For example, the importance of tourism to the economy within The Highland Council area is reflected by the high proportion of employment within the Accommodation & Food sector, as shown in Figure 12.

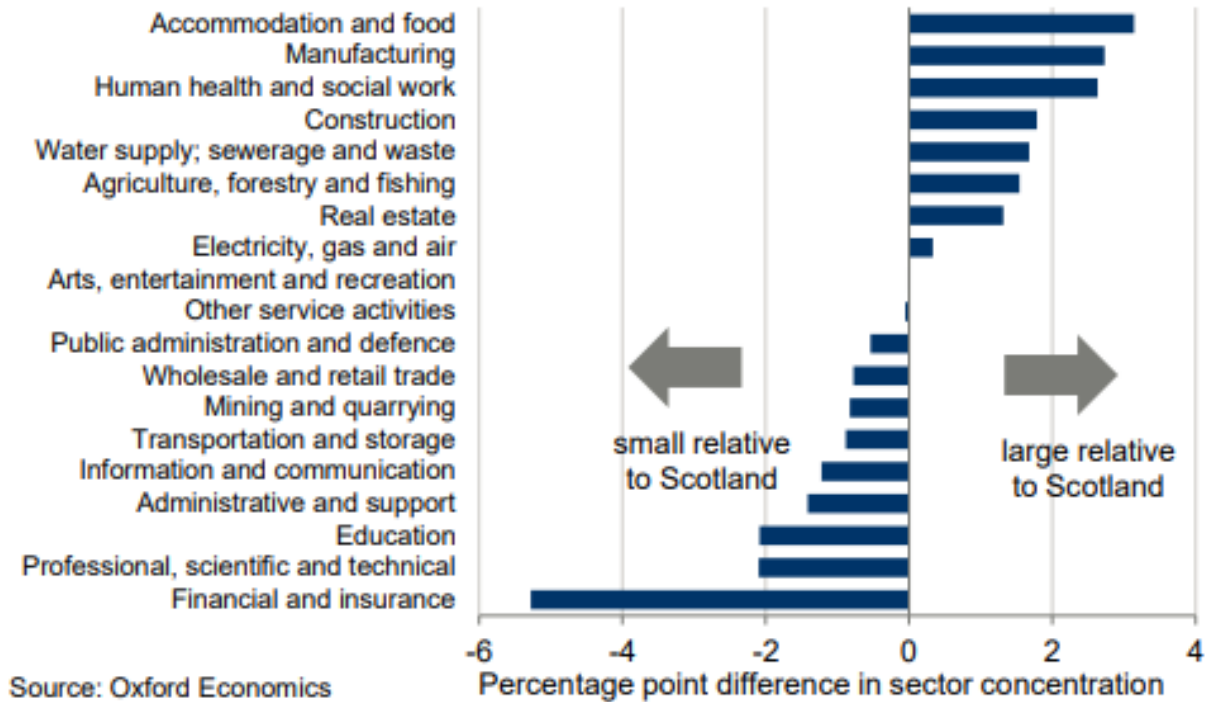


Source: Oxford Economics

**Figure 11: Index of GVA, Highland Council and Scotland, 2008-2018**

<sup>18</sup> The Oxford Economics’ report “International research on regional economic. Implications for delivering inclusive growth in Scotland” reports on Highland, the Islands and Moray separately therefore assuming Highland Council area.

<sup>19</sup> Oxford Economics, International Research on Regional Economies, Implication for Delivering Inclusive Growth in Scotland, Section 7.7 Highland, May 2019: <https://www.scottishfuturestrust.org.uk/storage/uploads/internationalresearchonregionaleconomiesmay2019.pdf>

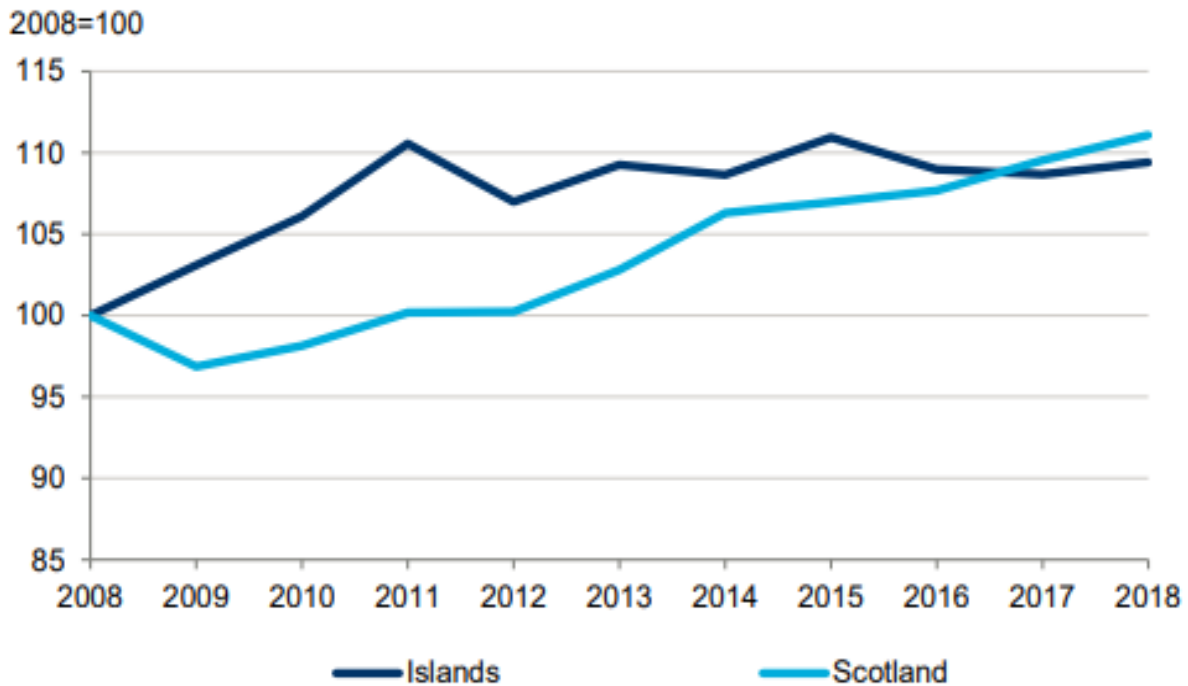


**Figure 12 Sector GVA Share Highland Council vs Scotland 2018**

The Islands’ economy (which includes the Shetland Isles) tends not to mirror overall economic trends at a national level as closely. As shown in Figure 12, the Islands are the only region that did not see a contraction in economic output during the 2008-09 recession. However, overall GVA on the Islands’ has fallen in four out of seven years since 2011, despite steady growth across Scotland<sup>20</sup>.

The Orkney Islands have seen employment growth of 1.3%, almost double the national average of 0.7% whilst Eilean Siar has experienced a nominal workplace employment expansion of 0.1%.

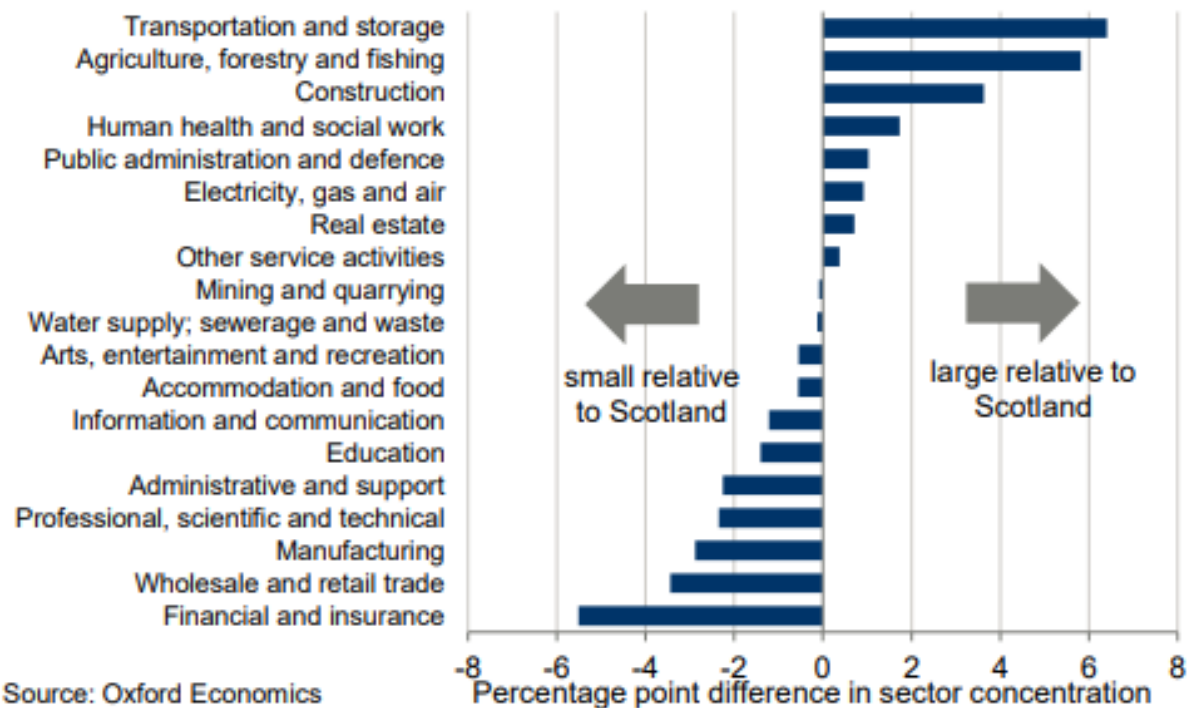
<sup>20</sup> Oxford Economics, International Research on Regional Economies, Implication for Delivering Inclusive Growth in Scotland, Section 7.8 Islands, May 2019: <https://www.scottishfuturestrust.org.uk/storage/uploads/internationalresearchonregionaleconomiesmay2019.pdf>



Source: Oxford Economics

**Figure 13: Index of GVA, Islands and Scotland, 2008-2018**

Transportation & Storage is the Island’s second largest sector, accounting for 11% GVA, over twice the Scottish equivalent. Agriculture, Forestry & Fishing is also well represented across the Islands (including Shetland); in contrast Financial & Insurance and Wholesale & Retail Trade – two of Scotland’s larger and most successful sectors, are both under-represented on the islands.



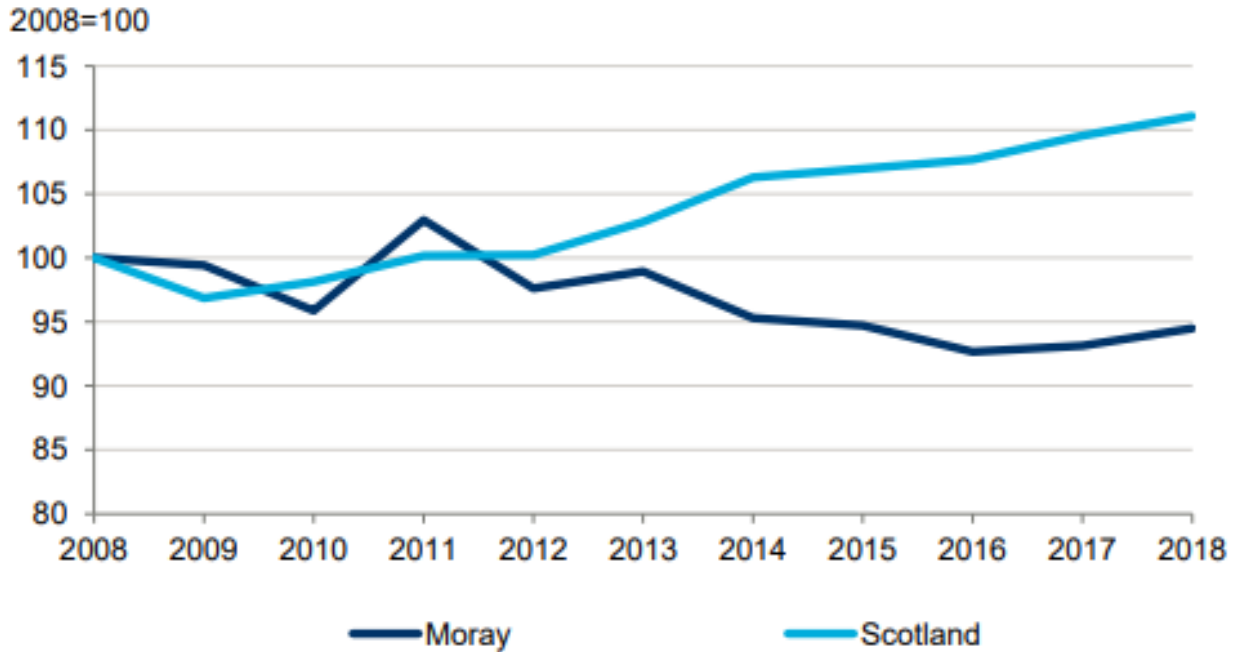
Source: Oxford Economics

**Figure 14: Sector GVA Share Islands vs Scotland 2018**





Moray Council’s economic performance has diverged from the national trend over the previous decade, as shown in Figure 15<sup>21</sup>. While Scotland has experienced fairly consistent growth from 2011 onwards, Moray Council’s economy has contracted. Moray’s recent workplace employment has been more positive, outperforming the Scotland’s economy with 1.1% annual average growth compared to 0.7% in Scotland as a whole.

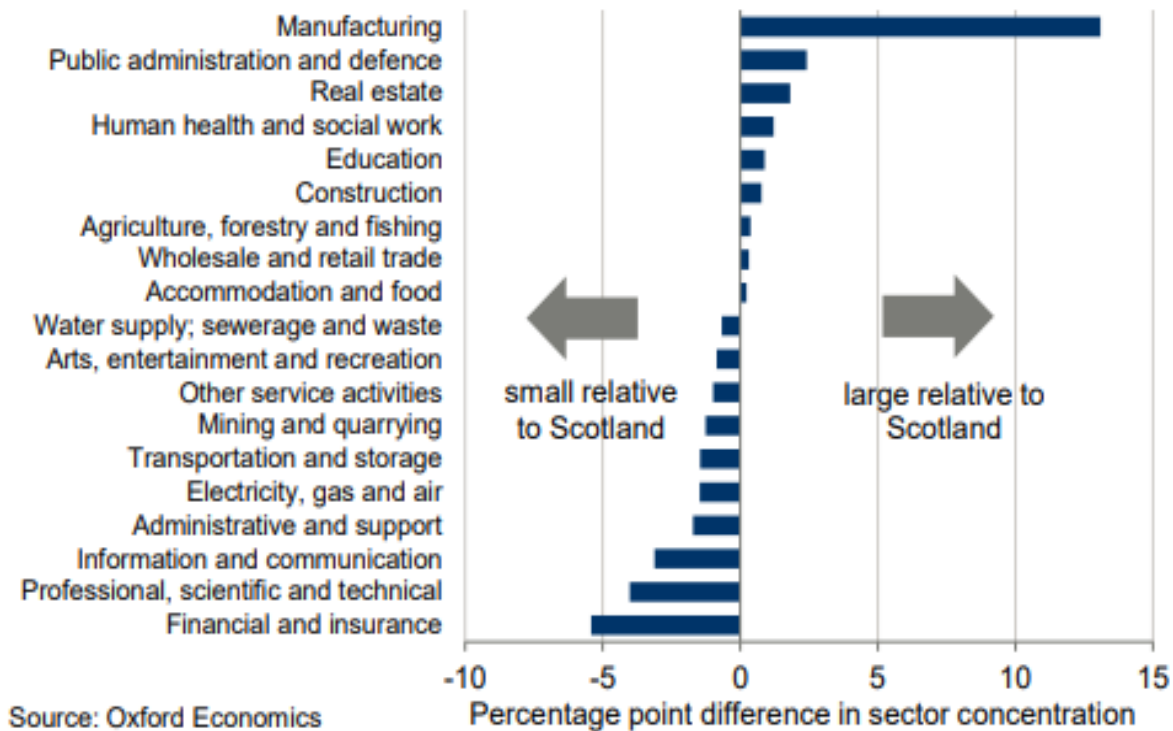


Source: Oxford Economics

Figure 15: Index of GVA, Moray and Scotland, 2008-2018

<sup>21</sup> Oxford Economics, International Research on Regional Economies, Implication for Delivering Inclusive Growth in Scotland, Section 7.9 Moray, May 2019: <https://www.scottishfuturestrust.org.uk/storage/uploads/internationalresearchonregionaleconomiesmay2019.pdf>





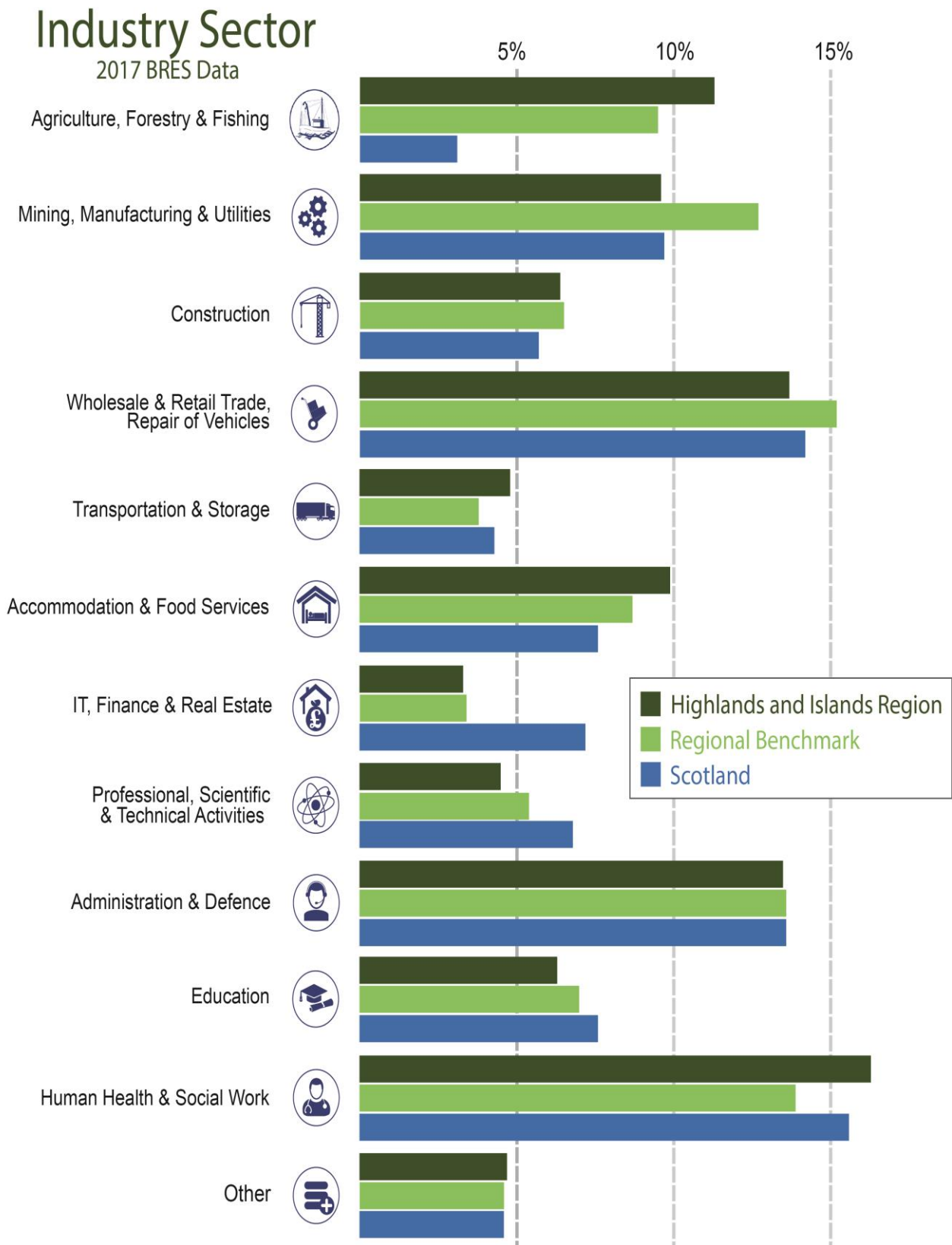
**Figure 16: Sector GVA Share Moray and Scotland, 2008-2018**

The 2016 GVA head for the Highlands and Islands regions (£22,345) is lower than the Scottish average (£24,800). It is important to note that the Highlands and Islands figure includes Shetland (£29,009) which is significantly higher than other areas. While all other local authorities within the Highland and Islands region fall below the national average there are still marked variations within the region; Highland (£23,308), Moray (£21,682), Orkney Islands (£21,144) and Eilean Siar (£17,286)<sup>22</sup>

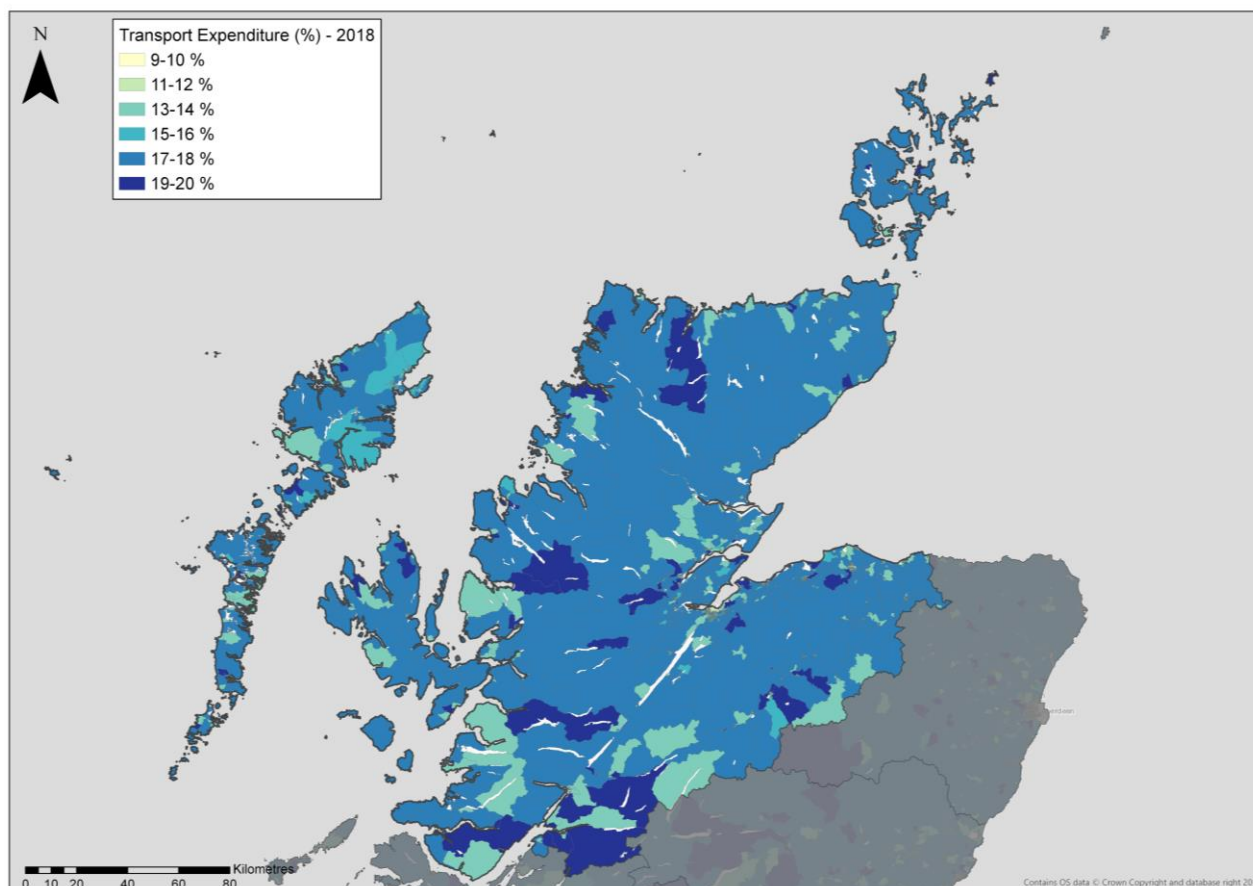
Within the Highlands and Islands region, the largest industry employer (in 2017) was Human Health & Social Work, which employed 16.3% of the regional working population, followed by Wholesale & Retail Trade at 13.7%. IT, Finance & Real Estate employed the lowest percentage of the working population (3.3%) within the region<sup>23</sup>.

<sup>22</sup> Office of National Statistics – Regional economic activity by gross value added (Balanced).

<sup>23</sup> BRES 2017



**Figure 17: Percentage of People Working in Each Industry Sector for Highlands and Islands Region**



**Figure 18: Transport Expenditure (%) relative to Household Budgets**

(Click image to enlarge figure)

Despite the lower proportion of people of working age in the region, economic activity is high at 81.8%; 4.1% higher than the national average. Earnings however are lower, with the average annual pay (£22,900) below the national average of £27,400. Orkney has the lowest average annual pay at £19,800<sup>24</sup>. In terms of transport expenditure<sup>25</sup>, the rural nature of the region and long travel distances mean that transport costs can comprise a large proportion of income for residents in the region, shown in Figure 18. Linked to this, there are large parts of the region which experience transport poverty<sup>26</sup>; as 58% of data zones in the region are classified as being at high risk of transport poverty, which is considerably higher than the national figure (38%). A more detailed consideration of the impact of high transport costs in the region is presented in Section 3.

### 2.3.5. Access to Employment

Figure 19 overleaf illustrates the accessibility in the region to key employment centres by public transport on a typical weekday morning. For the purpose of the analysis the top 10

<sup>24</sup> Nomis 2014 – 2018.

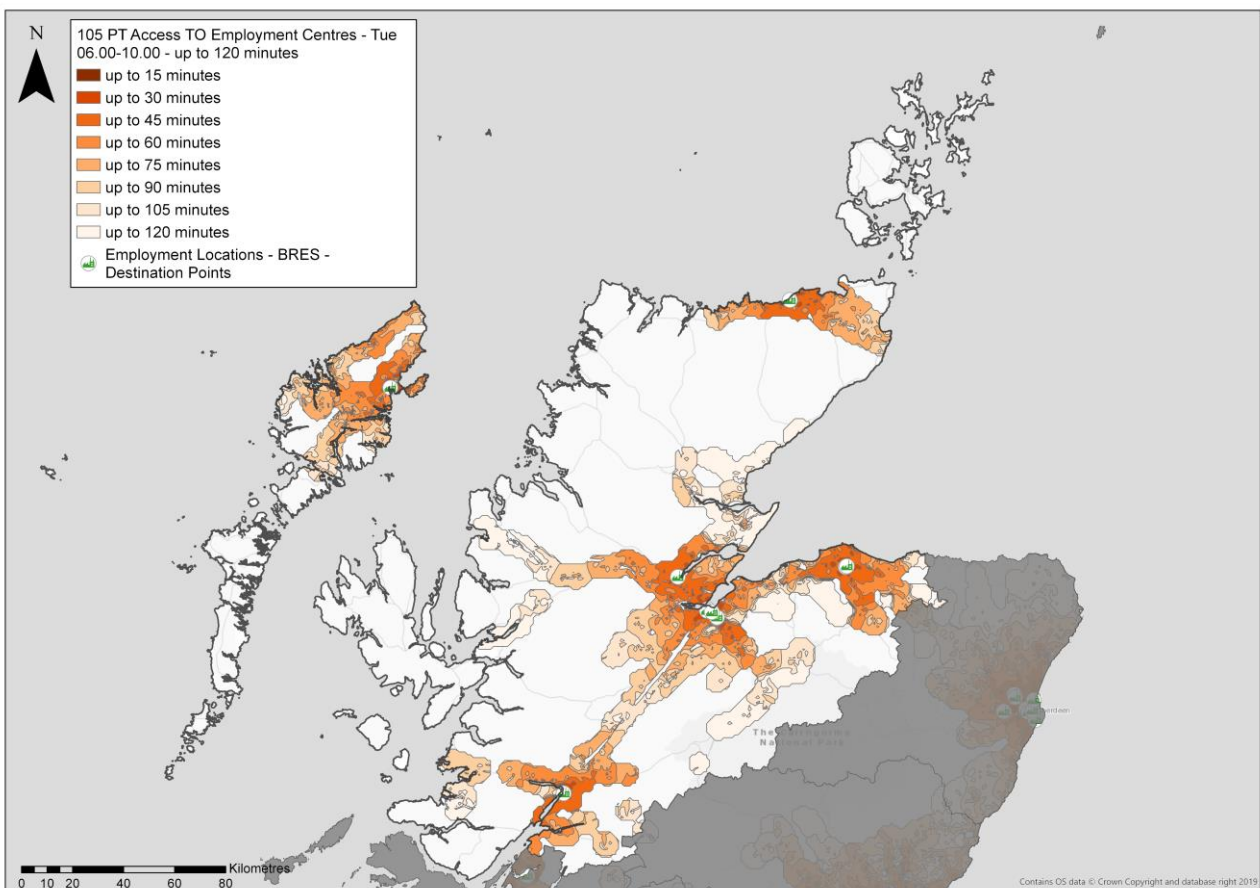
<sup>25</sup> Transport Expenditure is a calculation based on the average weekly household expenditure dedicated to transport (as a percentage of the total average weekly household expenditure; UK financial year 2018)

<sup>26</sup> Transport poverty has been calculated using Sustrans definition of Transport Poverty which combines; car availability, household income and access to services by public transport.

employment locations within the region were identified using BRES data. These sites are located in Inverness, Elgin, Dingwall, Fort William, Caithness and Stornoway. The image indicates that the majority of the region cannot access a key employment centre within two hours travel time on public transport on a typical weekday between 0600 and 1000. However, those living within the vicinity of the road or rail network and close to Thurso, Stornoway, Fort William, Inverness and Elgin can access the key employment centres by public transport within the two hour threshold.

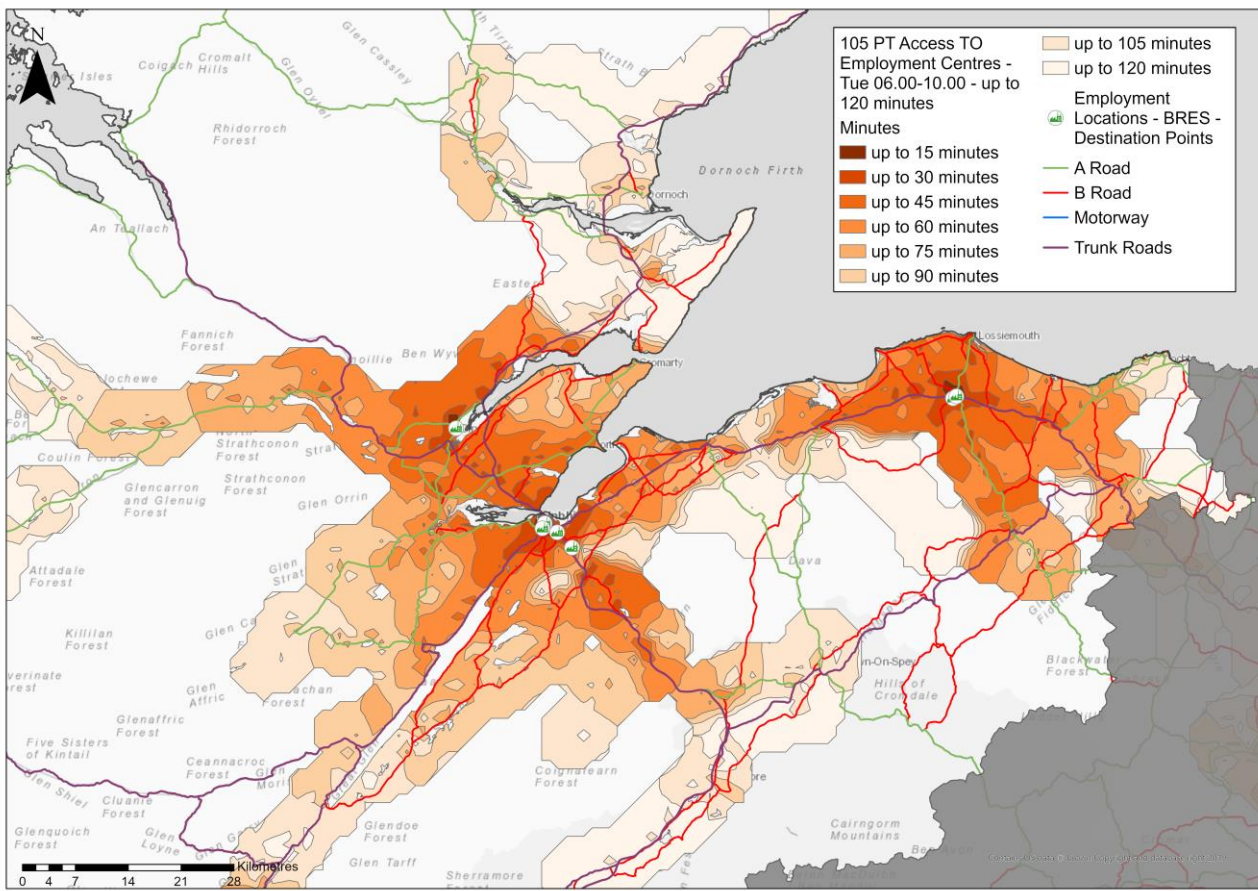
What is evident from the figure is the lack of access from the southern half of Eilean Siar with residents south of Tarbet on the Isle of Harris having no access to Stornoway by public transport within the time threshold. There are also significant areas in the North and West Highlands that have no access to key centres of employment by public transport; note no access is shown for Orkney as Kirkwall is not one of the top 10 employment centres in the region.

Around Inverness and along the A96 corridor, access to key employment centres by public transport is significantly better, as shown in Figure 20 overleaf.



**Figure 19 : Access to Key Employment Centres by Public Transport**  
 (Click image to enlarge figure)





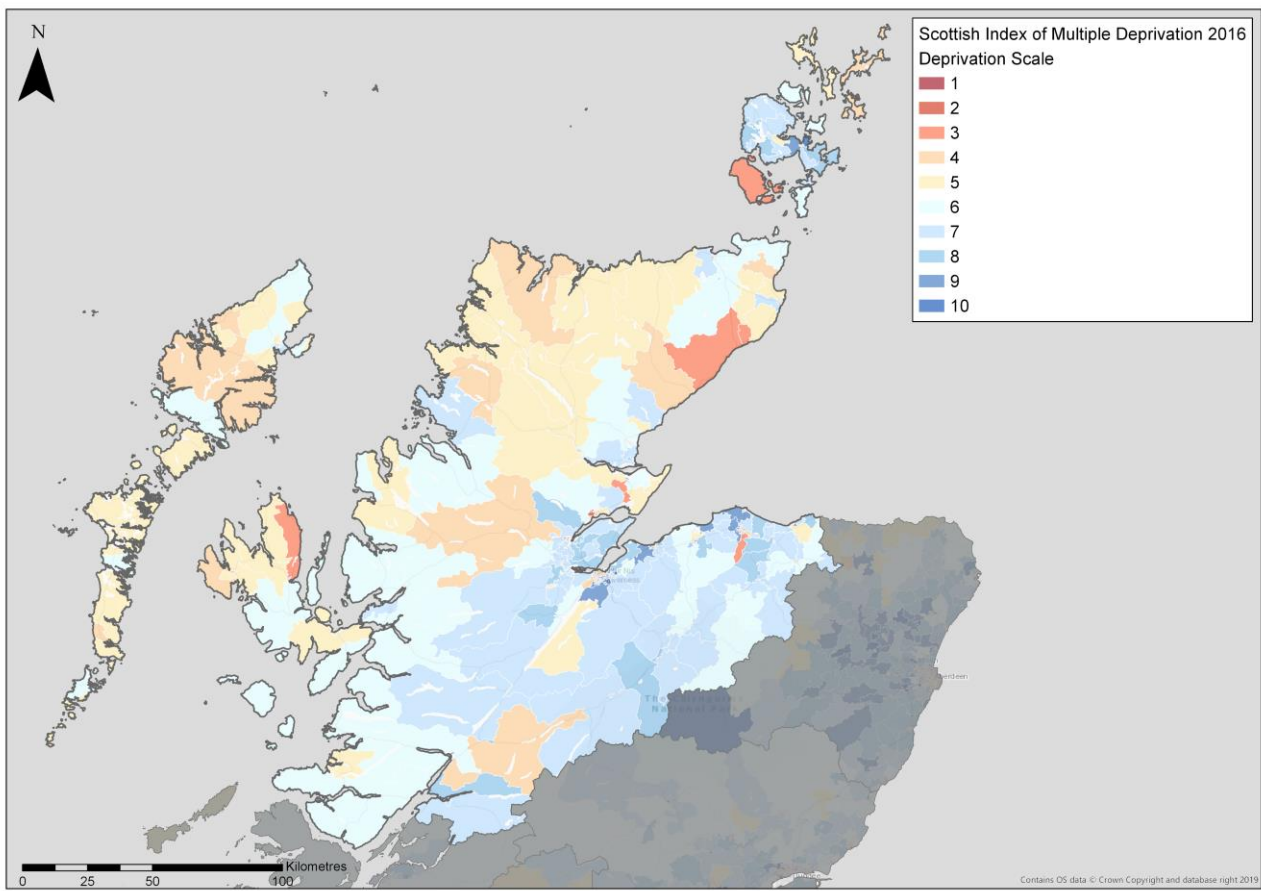
**Figure 20: Access to Employment Central Highland and Moray**

(Click image to enlarge figure)

**2.3.6. Deprivation**

The Scottish Index of Multiple Deprivation (SIMD) further demonstrates the socio-economic issues experienced in the region. As shown in Figure 21 overleaf, Eilean Siar and areas in the north of the Highlands show higher levels of deprivation compared to other data zones in the region. There are fewer healthcare services that are generally available in major settlements in the North West Highlands and therefore access to healthcare and services is limited, contributing to the low SIMD score for accessibility. However, accessibility is not the only factor of deprivation as there are deprived data zones found within Elgin and Inverness as shown in Figure 22 and Figure 23<sup>27</sup>.

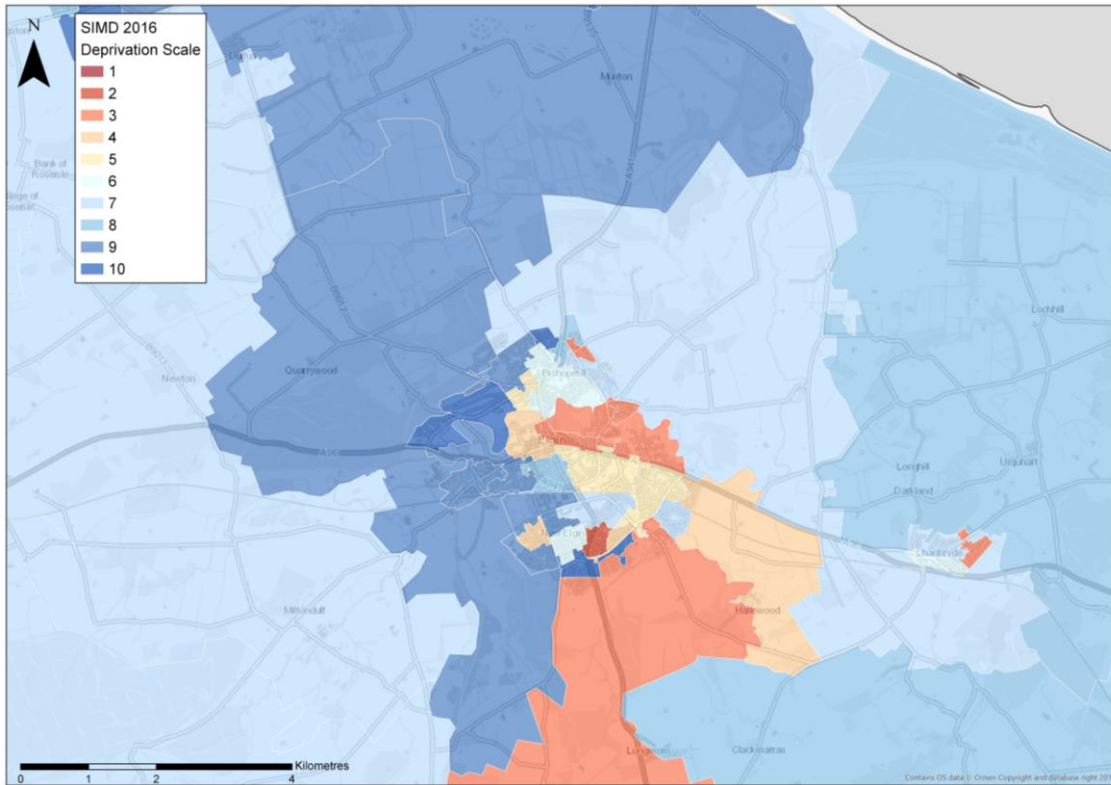
<sup>27</sup> 2016 SIMD Data has been used to prepare this report; 2019 SIMD data was published in January 2020.



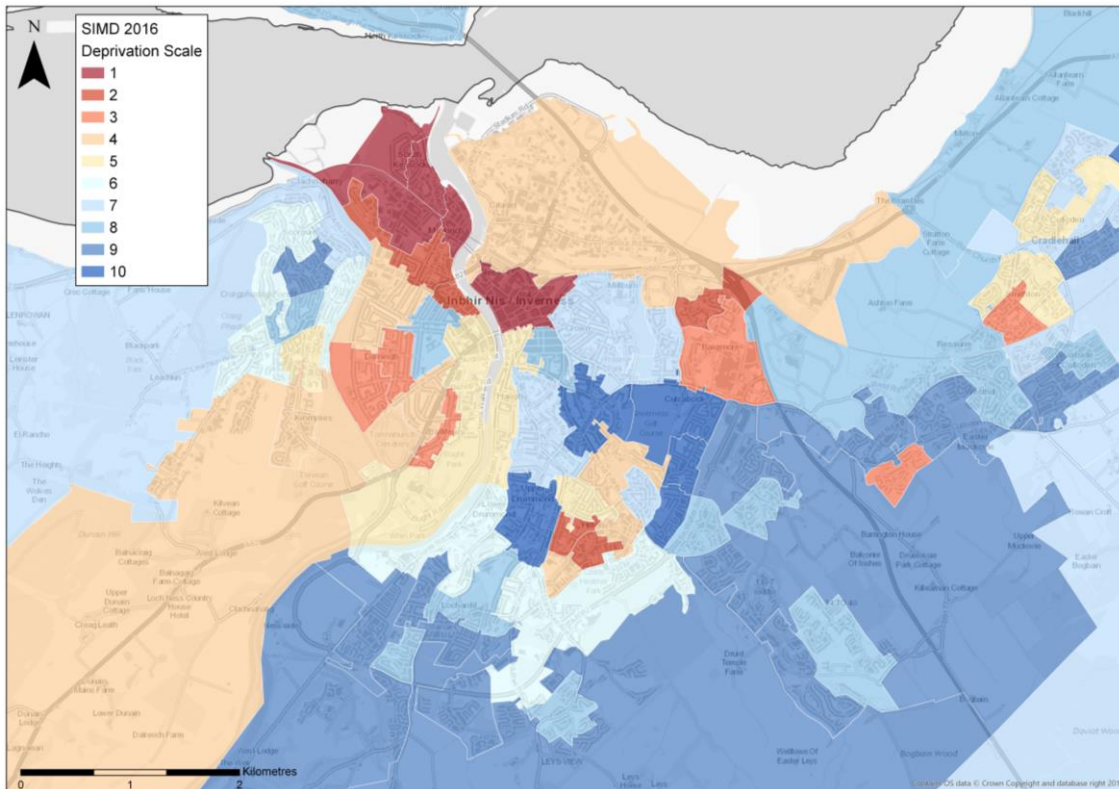
**Figure 21: Highlands and Islands Region - Scottish Index of Multiple Deprivation**

(Click image to enlarge figure)





**Figure 22: Elgin Overall SIMD**  
 (Click image to enlarge figure)

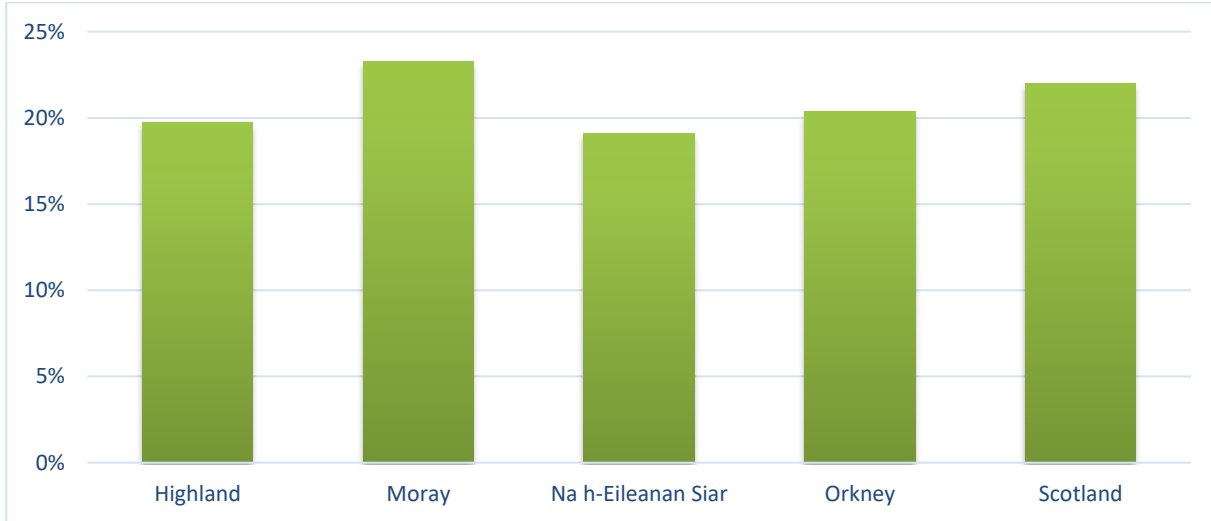


**Figure 23: Inverness Overall SIMD**  
 (Click image to enlarge figure)



**2.3.7. Health**

In terms of health, the proportion of people in the Highlands and Islands region with a long term physical or mental health condition is lower compared to the Scottish average of 22%. As shown in Figure 24, Moray was the only local authority area within the region with a slightly higher proportion than Scotland, with 23% of the area’s residents experiencing a long term physical or mental condition<sup>28</sup>.

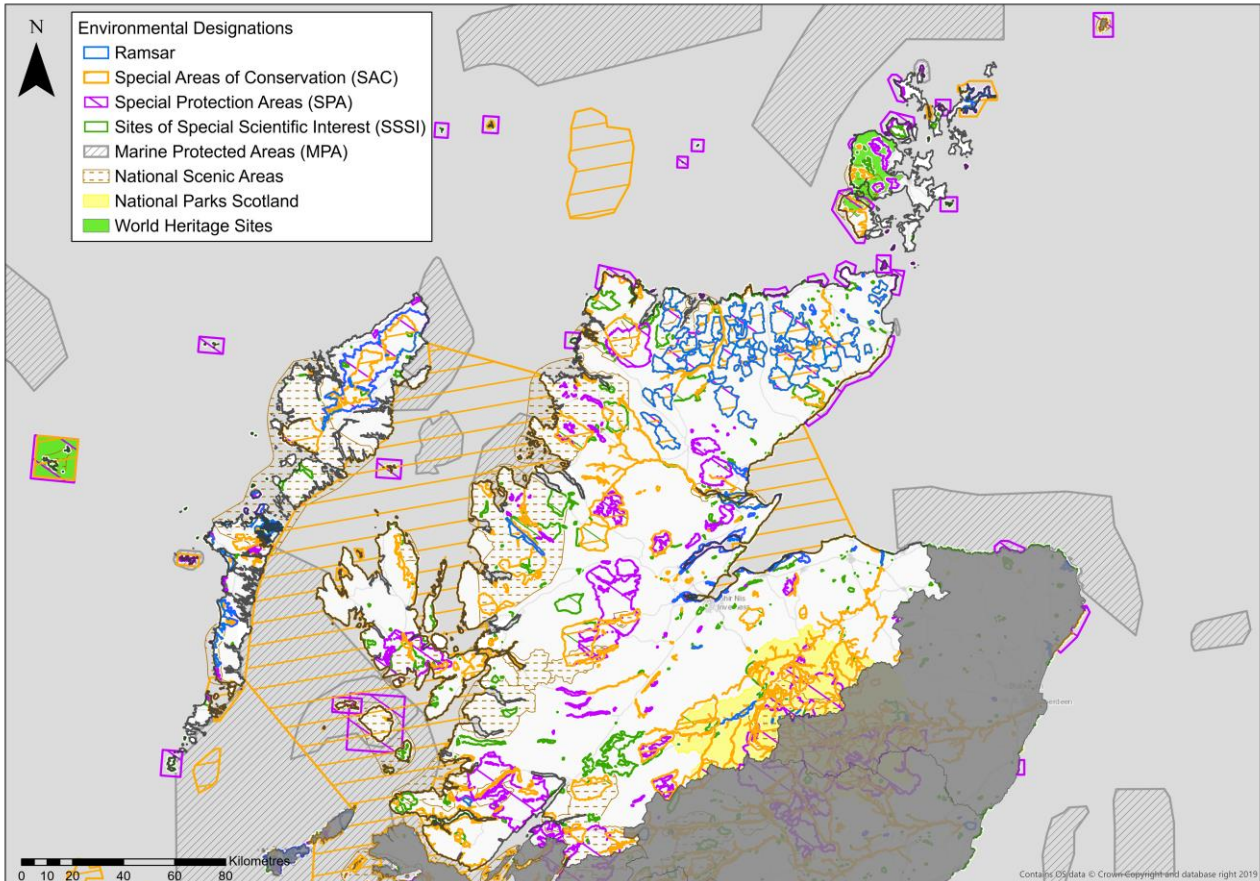


**Figure 24: Proposition of Population with a Long Term Physical or Mental Health Condition**

<sup>28</sup> Scottish Household Survey (2016).

## 2.4. Environmental Context

There are numerous Environmental Designations within the Highlands and Islands region as it contains a rich diversity of land and marine species and landscapes. There are 154 Special Areas of Conservation (SAC), covering over 7,000km<sup>2</sup> of land. There are also 100 Special Protection Areas (SPA), covering over 4,500km<sup>2</sup>. The region contains 17 of Scotland’s 40 National Scenic Areas (NSA).



**Figure 25: Environmental Baseline**

(Click image to enlarge figure)

The region holds the UK’s highest proportion of freshwater resources and there has been considerable hydro-electric development of watercourses in the region. There are a total of 1,370 surface water features in the Highlands and Islands, which includes rivers, lochs and coastal waterbodies. The scale and range of these environmental features can be seen in Figure 25<sup>29</sup>.

Two World Heritage Sites are found in the region; St. Kilda in the Hebridean Islands and The Heart of Neolithic Orkney.

In terms of carbon emissions, in 2017 Highland produced the lowest amount of CO<sub>2</sub> emissions of any Local Authority per head of population in Scotland (0.6 kts CO<sub>2</sub>), aside from Argyll & Bute. Eilean Siar and the Orkney Islands had significantly higher emissions

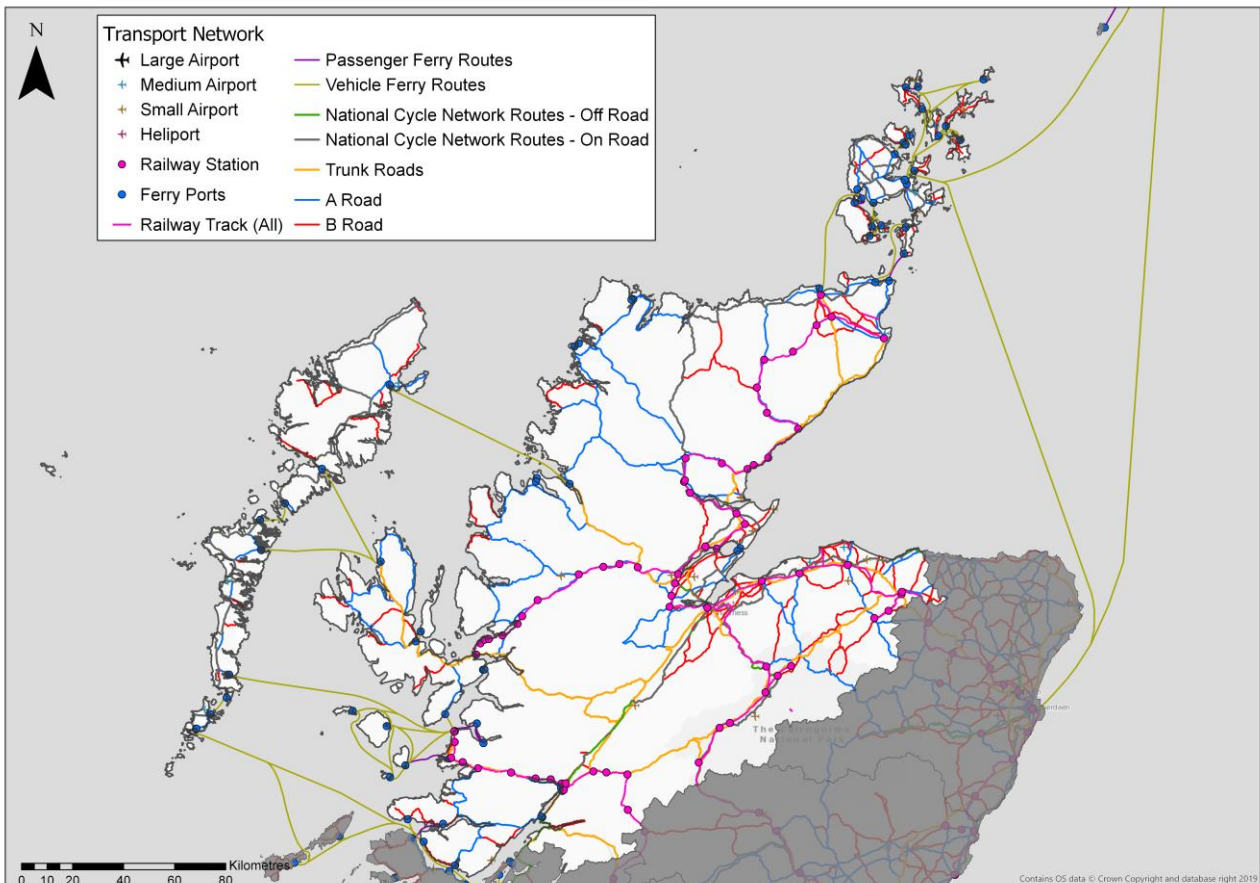
<sup>29</sup> Contains SNH information licensed under the Open Government Licence v3.0



of 8.7 kts of CO<sub>2</sub> while Moray emitted 5.1 kts CO<sub>2</sub><sup>30</sup>

## 2.5. Transport Context

Figure 26 shows the key transport networks in the region, including the National Cycle Network (NCN), rail lines and stations, and the trunk road network, as well as air and ferry ports. It shows that the Highlands and Islands region has a wide-ranging transport network with airports and ferry connections to and between the islands.



**Figure 26: Highlands and Islands Transport Network**

(Click image to enlarge figure)

### Active Travel

There are several on and off-road walking and cycling corridors in the region many being local networks, alongside a network of long-distance cycle routes that form part of the NCN. These are:

- NCN 7; which follows the A9 all the way to just south east of Inverness
- NCN 1; Aberdeen to Orkney via Inverness (part of the North Sea Cycle Route)

<sup>30</sup> UK local authority and regional carbon dioxide emissions national statistics 2005 to 2017, 2005 to 2017 UK local and regional CO<sub>2</sub> emissions – data tables:

<https://www.gov.uk/government/statistics/uk-local-authority-and-regional-carbon-dioxide-emissions-national-statistics-2005-to-2017>



- NCN 78; Campbeltown to Inverness via Fort William
- NCN 780; The Hebridean Way

As well as long distance cycling, there are several official way marked long-distance walking routes including the West Highland Way, the Great Glen Way and Moray Coast Trail. These are in addition to the multitude of unofficial long distance walking routes in the region (e.g. the Cape Wrath Trail, Skye Trail, East Highland Way, Speyside Way, Dava Way, Affric Kintail Way, Loch Ness 360, John O'Groats Way and the Hebridean Way). The above routes complement the core path network in the region.

### **Bus Network**

The majority of commercial bus services in the region are run by Stagecoach, with a number of smaller operators also providing services. Community Transport and Demand Responsive Transport services are available in all local authority areas. Frequency of services depends on time of day and location, although a strong message from stakeholder engagement has been that service frequency, reliability and operating hours mean that public transport is not regarded as a feasible alternative to the private car for many communities in the region.

Although the Highlands and Islands region has experienced absolute growth in the number of people travelling by bus four or more days per week (2007/08 – 2017), there are several factors that might be suppressing further growth; including bus connectivity, bus fares and bus quality. In the five years to 2015/16, bus service kilometres in the Highlands and Islands (including Shetland) for example have fallen by 11%, compared to a 5% reduction across Scotland as a whole<sup>31</sup>. More specifically, there has been a slight decrease in the proportion of people using the bus four or more times per week in Eilean Siar (-0.9%) and Moray (-0.1%)<sup>32</sup>. The proportion of people using the bus four or more days per week is 1.3% in Orkney Islands and 1.9% in Moray, which are the two lowest proportions of any local authority in Scotland.

### **Rail Network**

There are 62 rail stations in the Highlands and Islands situated on five rail lines, with 59 stations in Highland and three in Moray. A new station at Dalcross is due to be completed by the end of Network Rail's current control period (CP6). There is no rail infrastructure on the Orkney Islands or Eilean Siar. Ferries from Barra, South Uist and Kyle have connections to rail at their mainland destinations of Oban and Mallaig, however from other ferry ports on the West coast there are no rail connections.

In terms of station utilisation, patronage in the region has been largely stable, however there are some lines showing an increase in use while others have seen a decline, as shown in Table 1.

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<sup>31</sup> HITRANS. Draft HITRANS Regional Transport Strategy. May 2017.

<sup>32</sup> Data analysed from Transport and Travel in Scotland 2017.

**Table 1: Total Entries & Exits (000s) and Percentage Change between 2012/13 and 2017/18<sup>33</sup>**

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	% CHANGE
Aberdeen – Inverness	647	672	703	703	653	619	- 4.4%
Far North Line	349	365	338	323	315	318	- 9.1%
Kyle Line	208	207	187	182	173	183	-13.0%
Perth – Inverness	1,406	1,481	1,514	1,520	1,466	1,450	3.1%
West Highland Line	277	290	288	285	278	313	12.2%

Table 2 shows the five busiest stations in each local authority by patronage and the top five stations by growth between 2007-08 and 2017-18.

**Table 2: Highlands and Islands Top Five Rail Stations by 2017/18 Patronage and Top Five Stations by 10-Year Growth (000s) 2007/08-2017/18<sup>34</sup>**

Top 5 stations by 2017/18 Patronage		Top 5 stations by 10-year growth (2007/08 to 2017/18)	
<i>Inverness</i>	1,239	<i>Inverness</i>	263 (27%)
<i>Elgin</i>	299	<i>Elgin</i>	53 (21%)
<i>Fort William</i>	156	<i>Nairn</i>	42 (59%)
<i>Aviemore</i>	148	<i>Fort William</i>	36 (30%)
<i>Forres</i>	118	<i>Mallaig</i>	33 (52%)

## Ports and Ferries

There are 70 ports in the region. Twenty four vehicle ferry routes and eight passenger-only ferry routes operate to and/or from ports in the region. Ten are provided with subsidies from Local Authorities, and 12 are subsidised by the Scottish Government. For many on the islands, ferries are the most frequently used mode of public transport.

<sup>33</sup> ORR Data Entries and Exits, available at <https://dataportal.orr.gov.uk/statistics/usage/estimates-of-station-usage/>

<sup>34</sup> ORR Data 10 Year Growth, available at <https://dataportal.orr.gov.uk/statistics/usage/estimates-of-station-usage/>



**Table 3: Highlands and Islands Ferry Services**

<b>Ardaurchan Charters:</b>	<b>John O'Groats Ferries:</b>
Ardnamurchan - Morvern – Mull	John O' Groats - South Ronaldsay
<b>Arisaig Marine:</b>	<b>Knoydart Seabridge:</b>
Arisaig - Eigg - Muck – Rum	Mallaig - Inverie – Tarbet
<b>CalMac Ferries:</b>	<b>Northlink Ferries:</b>
Barra - Eriskay	Aberdeen - Kirkwall - Lerwick
Lochaline - Mull	Scrabster – Stromness
Mallaig - Eigg - Muck - Rum - Canna	<b>Orkney Ferries:</b>
Mallaig - Skye	Houton - Hoy - Flotta - South Walls
Mallaig - South Uist	Kirkwall - North Ronaldsay - Papa Westray
North Uist - Harris	Kirkwall - Sanday - Eday - Stronsay
Oban - Barra	Kirkwall - Shapinsay
Skye - Harris	Kirkwall - Westray - Papa Westray
Skye - North Uist	Stromness - Hoy - Graemsay
Skye - Raasay	Tingwall - Rousay - Egilsay - Wyre
Tobermory - Kilchoan	Westray - Papa Westray
Ullapool – Lewis	<b>Pentland Ferries:</b>
<b>Highland Council:</b>	Gill's Bay - South Ronaldsay
Nether Lochaber – Ardgour (Corran ferry)	<b>Scoraig Ferry:</b>
<b>Highland Ferries:</b>	Scoraig – Badluarach
Cromarty - Nigg	<b>Skye Ferry CIC:</b>
Fort William – Camusnagaul	Skye – Glenelg

Passenger numbers on ferries have been increasing since the introduction of the Road Equivalent Tariff (RET) on Calmac's ferry network which, following initial pilot in 2008, had completed its roll-out across the Clyde and Hebridean Ferry Network by 2015. RET has had a significant impact in increasing the number of car journeys to/from the islands, particularly during the summer, reducing capacity for island residents and other users.

A full review of ferry data is currently being co-ordinated as part of STPR2, which will provide a baseline of island connectivity for future planning.

### Road Network

The size of the region is reflected in the 11,534 kilometres (7,167 miles) of road. A detailed breakdown is shown in Table 4.

**Table 4: Length of the Highlands and Islands Road Network by Type<sup>35</sup>**

Authority	Trunk Roads A	Public road lengths (km) by Local Authority and Class, 2016/17				
		A	B	C	U	Total (incl. trunk roads)
Highland	959	1,392	976	1,440	2,937	6,745 (7,704)
Moray	98	157	296	366	736	1,555 (1,654)
Orkney Islands	-	161	205	160	459	985
Eilean Siar	-	340	177	189	486	1,191

The trunk road network consists of the following routes; it is noted that no roads are classified as trunk roads in the Orkney Islands or Eilean Siar :

- A82 (Dalnottar to Inverness)
- A86 (Spean Bridge to Kingussie)
- A87 (Invergarry to Kyle of Lochalsh, Borve, Uig)
- A830 (Fort William to Mallaig)
- A835 (Tore to Ullapool)
- A893 (Ullapool (Shore Street))
- A889 (Dalwhinnie to Laggan Bridge)
- A96 (Aberdeen to Inverness)
- A9 (Stirling to Thurso)
- A95 (Granish to Keith)
- A99 (Latheron to Wick)

## Air

The region has six airports that are operated and managed by Highlands and Islands Airports Limited (HIAL) supported by subsidies provided by the Scottish Government. There are six other airports that operate air services. The air services provided by the six HIAL airports are all internal/domestic flights providing lifeline access with the exception of Inverness airport that provides international flights to destinations across Europe and Kirkwall, which provides an air link to Norway. With the exception of Wick, passenger numbers at the airports have all increased between 2012 and 2018. Inverness in particular has seen a 49% increase, as shown in Table 5; this is considered to be due to the wider choice of destinations from Inverness and the increased service frequency.

<sup>35</sup> Scottish Transport Statistics. Available at: <https://www.transport.gov.scot/publication/scottish-transport-statistics-no-36-2017-edition/chapter-4-road-network/>

**Table 5: Passenger Numbers Change at Highlands and Islands Airports Since 2012<sup>36</sup>.**

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	% Change
<b>Barra</b>	11,567	9,230	10,533	11,663	13,552	14,810	14,804	28%
<b>Benbecula</b>	36,439	31,781	33,896	33,938	33,812	35,360	38,007	4%
<b>Inverness</b>	611,382	619,463	657,661	671,103	829,018	875,873	909,159	49%
<b>Kirkwall</b>	164,228	177,899	177,278	177,755	179,590	195,982	195,945	19%
<b>Stornoway</b>	128,010	127,074	133,548	129,609	130,905	139,951	137,181	7%
<b>Wick</b>	33,921	41,281	36,762	27,937	23,789	19,797	19,450	-43%

The Air Discount Scheme (ADS) provides a discount of 50% of the core airfare for eligible passengers<sup>37</sup> in the region.

## 2.6. Context Summary

- Over the last decade, the region has generally performed better than Scotland in economic terms. Deprivation is generally low in the region however accessibility scores are very low for many data zones especially the North West, the Western Isles and the Orkney Islands.
- The region experienced population growth between 2011 – 2018, however sustaining and increasing a working age population is a significant challenge, particularly for rural and island areas.
- Car ownership in the region is higher than the Scottish average, a result of long distances due to the region's geography and the centralisation of key services. However, the proportion of commuters who travel to work by car is similar to the national average and travel by active travel mode is proportionally higher than the national average.
- The region experiences a higher percentage of residents travelling 60+ km to work than the national average, reflective of the region's geography. Remote working is also more common in the region with a higher percentage of people working from home than the national average, which again is reflective of the region's geography and nature of employment.
- The region has a high level of economic activity at 81.8%, however annual salary is lower than the national average. The economy of the Highlands has grown in line with Scotland in recent years and the economy of with the Islands (including Shetland Islands) outstripped growth in the rest of Scotland until 2015, before reducing slightly. In Moray, the economy has shown a decline since 2011, which is in contrast to the

<sup>36</sup> HIAL Annual Reports. Available at: <https://www.hial.co.uk/hial-group/about-us/annual-report-board-minutes/>

<sup>37</sup> Air Discount Scheme for the Highlands and Islands. [www.airdiscountscheme.com/](http://www.airdiscountscheme.com/)



economic growth experienced at a national level; this may be a result of the economic sectors for the Moray region, which is dominated by the manufacturing sector. .

- Given the lower than average salaries and longer distanced travelled, transport expenditure is generally high in the region. There is also a high risk of transport poverty in large areas of the region, with availability, cost and frequency of public transport an issue.
- The bus network is a mixture of commercial bus services and community transport and demand responsive services, although there is a wide variety of frequency and availability depending on the time of day and where you in the region.
- There is approximately 1000km of trunk road in the region, however the majority of the network is managed by the local authorities, including all roads on the islands.
- The islands within the region are reliant on ferry and air services to provide connectivity both between islands and to the mainland, and there has been significant growth in patronage in the majority of the region's airports since 2012.
- Key documents and policies considered within the context of STPR2 generally have a strong focus on tackling the climate emergency, strengthening connectivity and promoting tourism as drivers for economic growth.



## 3. Problems & Opportunities

### 3.1. Approach to Problem & Opportunity Identification

Deriving evidenced transport related problems and opportunities is a critical element of the Initial Appraisal: Case for Change. They are identified from a range of sources including a review of existing policy and strategy documents, data analysis and extensive stakeholder engagement. This Chapter sets out the problems and opportunities with the strategic transport network in the Highlands and Islands region and details the approach to their identification.

#### 3.1.1. Data Analysis

A wide range of data sources have been used to identify transport related problems and opportunities in the region. Analysis of the data has also enabled problems and opportunities identified through stakeholder engagement to be evidenced to understand the real and perceived nature of feedback and comments raised. Sources of analysis have included primary data such as Scottish Household Survey<sup>38</sup>, Transport and Travel Scotland<sup>39</sup>, mobile phone data<sup>40</sup> for journey times, accident data, public transport provision, as well as data gathered from recent reports and studies in the region. Key findings from the data analysis are presented below, to evidence the problem and opportunity themes set out.

#### 3.1.2. Stakeholder Engagement

Stakeholder engagement is an important element in the identification of problems and opportunities. For the Highlands and Islands region this has consisted of:

- **Problems and Opportunities workshops** held in Elgin, Inverness, Kirkwall, Thurso, Stornoway and Fort William with regional stakeholders in June 2019.
- **Option Generation workshops** held in Inverness, Elgin, Kirkwall, Stornoway and Fort William in November and December 2019 to identify potential options to address the identified problems and opportunities.
- **Structured interviews** with senior officers across the local authorities and other organisations in the region.
- **Elected Members Briefings** held in January and February 2020 in Inverness, Kirkwall and Stornoway
- An **Online Survey** carried out between 2nd December 2019 and 10th January 2020 for the public and organisations to provide their views on transport issues and challenges in their day to day journeys.
- **Regional Transport Working Group** meetings, which includes representatives from the constituent Councils, HITRANS, HIE and the SCDI.
- **Schools Engagement** is underway throughout the country, with two primary schools (both in Highland) involved in undertaking an exercise to consider the transport problems and opportunities in their area and to develop this into a transport plan setting

<sup>38</sup> Scottish Government. Scottish Household Survey.

<https://www2.gov.scot/Topics/Statistics/16002>

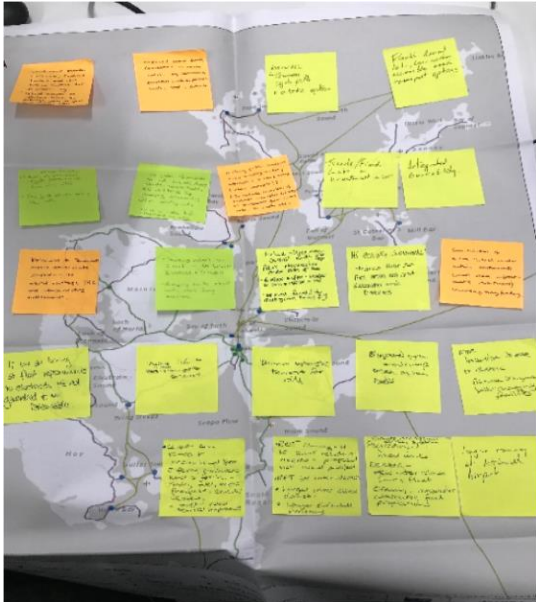
<sup>39</sup> Transport and Travel in Scotland results from the Scottish household Survey, 2018  
<https://www.transport.gov.scot/publication/transport-and-travel-in-scotland-results-from-the-scottish-household-survey-1/>

<sup>40</sup> Data supplied by INRIX via Transport Scotland



out what is required.

Further details of stakeholder engagement activities are available in **Appendix C**.



**Figure 27: Stakeholder Engagement**

### 3.2. Problem & Opportunities

Based on the activities described above, the following transport-related problems and opportunities have been identified for the Highlands and Islands region. Evidence to support the themes listed below is provided in this section.

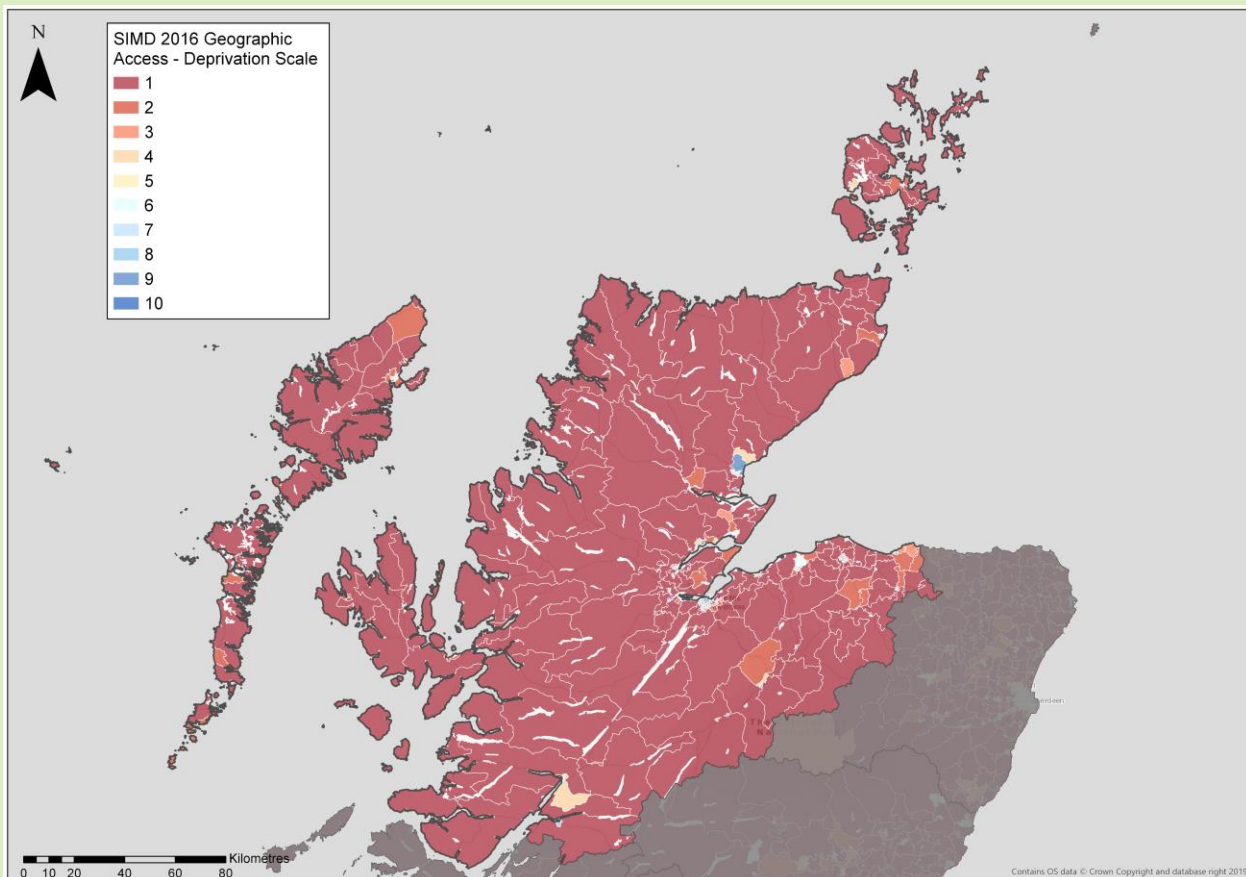
- Connectivity
- Transport Poverty
- Capacity Constraints
- Journey Times
- Resilience
- Public Transport Frequency and Integration
- Dependence on Private Car

### 3.2.1. Problems

#### Connectivity

The issue of poor connectivity both within the Highlands and Islands region and from the region to the rest of Scotland has been frequently raised throughout this study.

Within the region, data from the Scottish Index of Multiple Deprivation (SIMD) shows that one third of datazones in the region are ranked amongst the lowest 10% in Scotland in terms of accessibility<sup>41</sup>.



**Figure 28: SIMD - Access Deprivation**

(Click image to enlarge figure)

With services being located in key settlements, residents in the region outside of these settlements will typically have to travel longer distances to reach key services. Linked to this, a common concern raised during stakeholder engagement focused on the centralisation of services, in particular medical services, which leaves those living outwith urban centres feeling isolated.

The difficulties of completing a viable working day in Glasgow, Edinburgh, Aberdeen and Inverness was another problem highlighted during stakeholder engagement, with the availability and timing of public transport services said to reduce connectivity and the resulting opportunities for those living and working in the region. Table 6 indicates whether

<sup>41</sup> The geographic access indicator is based on the average drive time to a petrol station, a GP surgery, a post office, a primary school, a secondary school and a retail centre. This is combined with public transport travel time to a GP surgery, a post office and a retail centre to give an overall access score.

it is possible to travel from a number of the key settlements in the region to Glasgow, Edinburgh, Inverness and Aberdeen for a six hour working day, starting at 10am, by public transport<sup>42</sup>.

**Table 6: Viable Working Day (10am-4pm) in Scottish Cities from Various Settlements**<sup>42</sup>

	Glasgow	Edinburgh	Inverness	Aberdeen
Fort William	x	x	✓	x
Stornoway	✓	x	✓	x
Kirkwall	x	✓	x	✓
Thurso	x	x	x	x
Elgin	x	✓	✓	✓
Ullapool	x	x	x	x

As shown in Table 6, connectivity to the stated cities is a problem for both mainland and island residents in the region, for example:

- From **Fort William**, it is only possible to travel by public transport to Inverness for a full working day, while from **Ullapool** and **Thurso** it is not possible to reach any of the cities assessed;
- Travelling from **Elgin**, it is possible to arrive in Edinburgh at 0930 and Glasgow at 1010, however each of these journeys require a train departure time of 0530 and would mean an arrival time back in Elgin at 2115;
- Air services offer good connectivity from the islands to the mainland but only where flights are available at the times required. Multiple examples were provided during stakeholder engagement where a trip to the Central Belt or Inverness for a two hour meeting would entail a two night trip away. From **Stornoway**, the only cities where a full working day can be completed is Glasgow or Inverness as services to Edinburgh and Aberdeen either do not exist or are not frequent enough to provide flexibility to travellers. From **Kirkwall**, services allow for a working day in Edinburgh and Aberdeen but not Inverness or Glasgow, depending on the time of year.

To an extent, these services limit the opportunities for residents and businesses to do business, attend meetings/courses, or participate in other activities across Scotland. It should also be noted that opportunities will vary by season as the winter timetable does not provide the same availability.

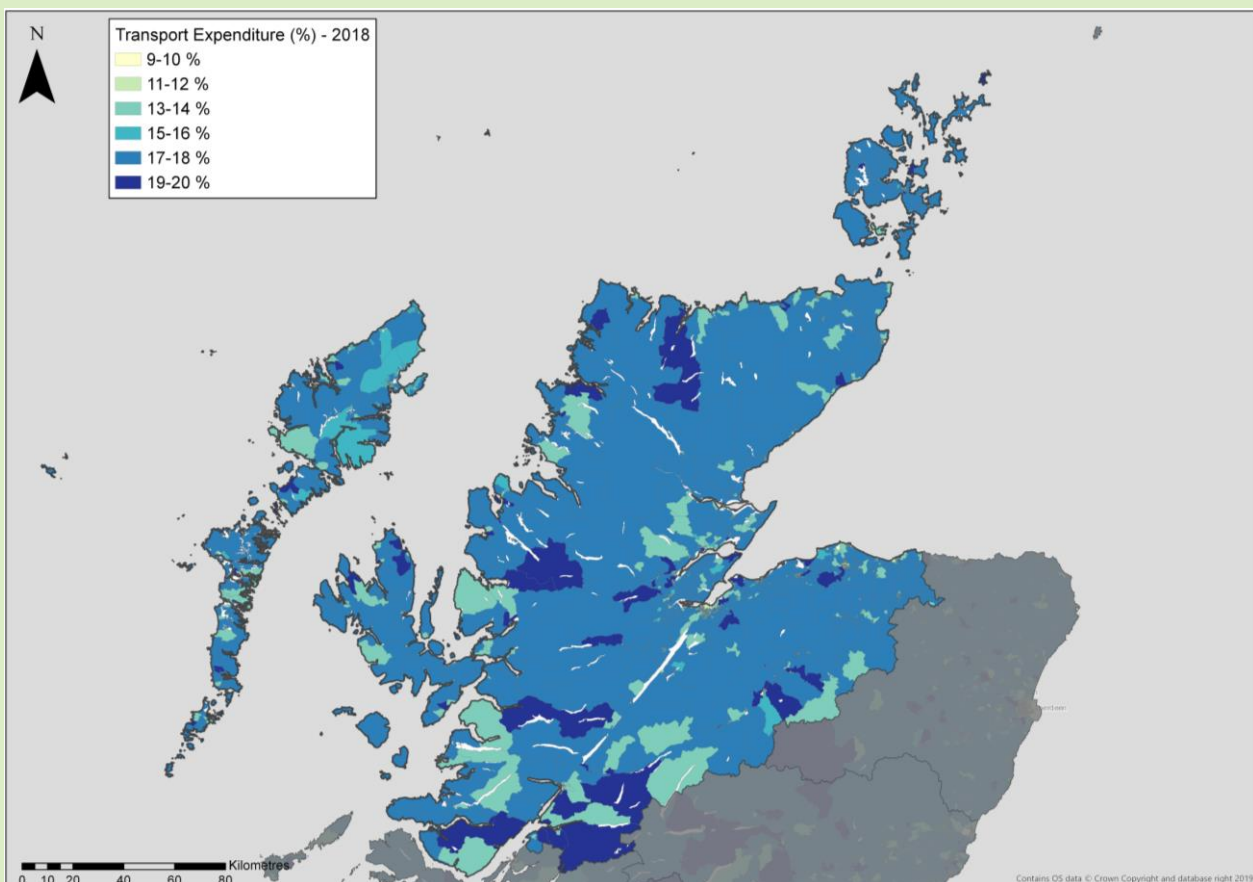
In addition to the availability of services, the cost of travel from islands to the mainland was regarded by a number of stakeholders as prohibitive and is acting as a barrier to travel; particularly by air. Stakeholders highlighted that the cost of travel to/from the islands deters people from basing themselves in the region, contributes to a premium in

<sup>42</sup> Analysis based on data taken from Traveline and Loganair based on mid-February 2020 timetables, reviewed in February 2020.

the cost of goods and can deter tourists. A high level fares review<sup>43</sup> shows for instance that, for a family of four, flights range in cost from £515 to £1,220 for travel between Edinburgh-Kirkwall (return) and between £730 and £1,200 for Edinburgh-Stornoway (return) journeys

### Transport Poverty

Overall, households within the Highland and Islands region spend a high proportion of their household budget on transport expenditure. As shown in Figure 29, the majority of data zones spend between 17-18%<sup>44</sup> of their budget on transport, compared to the national average of 14%.



**Figure 29: Transport Expenditure (%) relative to Household Budgets**

(Click image to enlarge figure)

Households in rural areas spend the highest proportion of their budget on transport costs, with the proportion of expenditure lower within the main settlements of Inverness, Nairn, Forres, Elgin, Thurso, Fort William, Stornoway and Kirkwall. This is partly due to the longer distances travelled and the higher costs of fuel in the region. For example, the average price per litre of petrol was £1.19 in Elgin, in other parts of the region, it was recorded to be considerably higher (e.g. Thurso: £1.26, Stornoway: £1.29 and Kirkwall: £1.32).

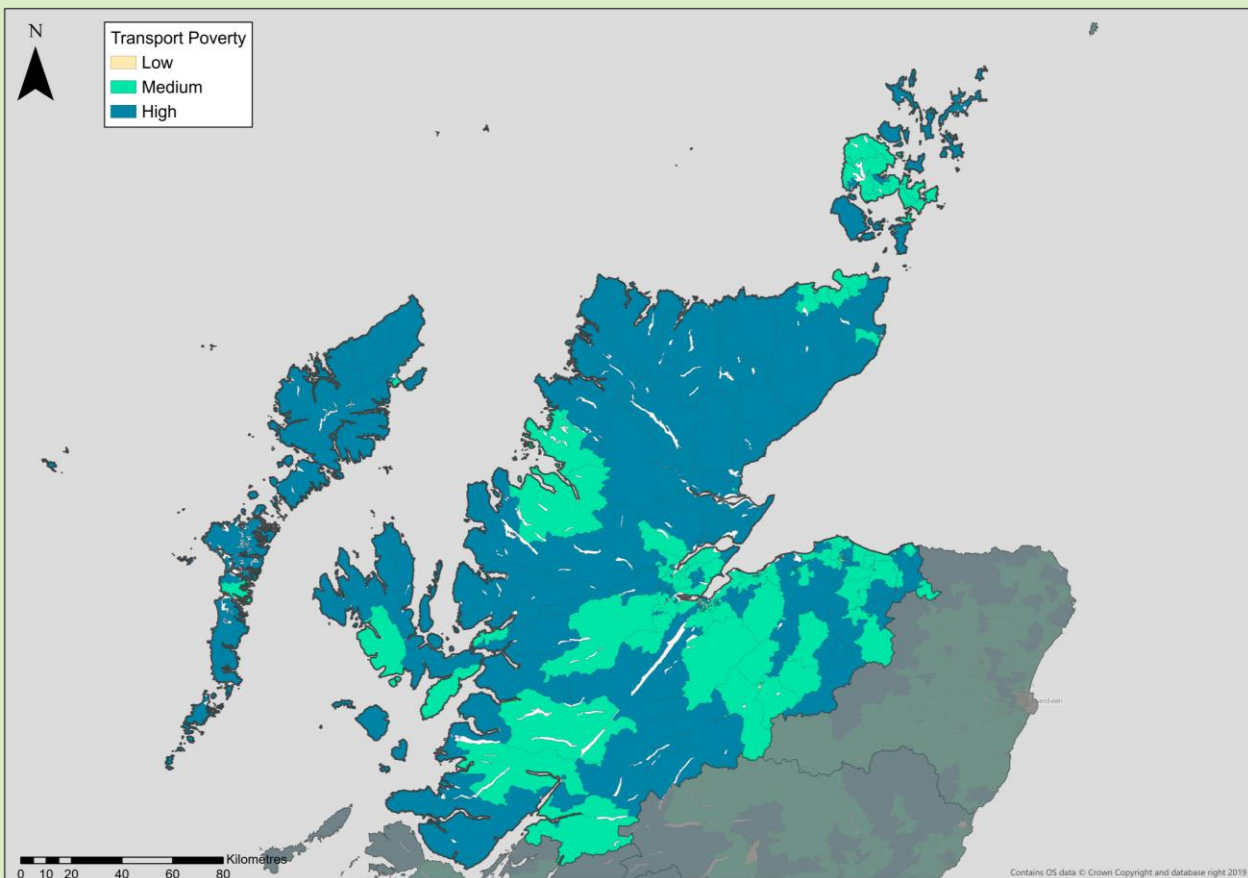
<sup>43</sup> Loganair; cost range provided covers for trips in February 2020 and July 2020, with fares correct at February 2020.

<sup>44</sup> Office for National Statistics (ONS), Census 2011 (Scotland)

<https://scotlandscensus.gov.uk/> - living costs and food survey - financial year ending 2018.



Figure 30 presents a Transport Poverty map for the Highland and Islands region and demonstrates that 58% of data zones are classified as being at high risk of transport poverty compared to 38% in Scotland. A further 38% of data zones were classified as medium risk (41% national average) and 4% were classified as low risk (21% national average). Transport Poverty indicates how likely those living in each data zone are to have a lack of affordable transport options to access essential services or work<sup>45</sup> and, as illustrated, transport poverty is a particular issue on Eilean Siar and in rural parts of the mainland. Only three data zones on the Islands were classified as being at low risk of experiencing transport poverty, all of which are on Orkney Mainland. Of the mainland data zones classified as low, each data zone is located in an urban area.



**Figure 30 Transport Poverty in the Highland and Islands Region**

(Click image to enlarge figure)

As Transport Poverty is a combination of high transport costs combined with low household incomes, young people can be at particular risk, as has been highlighted in a number of other studies. For example, research<sup>46</sup> undertaken by HIE identified that "transport is the factor where most young people perceive compromise as necessary, with almost 80% of young people acknowledging that transport and travel is more difficult and

<sup>45</sup> Transport Poverty is based on research which uses data household income, car availability and access to the public transport network data.

<https://www.sustrans.org.uk/our-blog/research/all-themes/all/transport-poverty-in-scotland/>

<sup>46</sup> Young People and the Highlands and Islands: Maximising Opportunities, HIE (2018).



expensive in the Highlands and Islands." The same study identified that "around a third of young people (31%) see lack of transport (or lack of affordable transport) as a barrier to study and 12% as a barrier to employment", concluding that "difficult and expensive travel is of disproportionate significance for young people in more rural communities".

Furthermore, 26.3% of young people who responded to a recent survey<sup>47</sup> in the region said that, in an average week, they spend more than £9 on travel to medical and/or other appointments, which is nearly double the percentage of young people who pay more than £9 nationally (14.1%).

The cost of rail journeys in the region has also been highlighted as an issue for both everyday journeys and for longer distance journeys, for example to the Central Belt. An exercise has been undertaken to compare the cost of rail journeys in the Highlands region against other regions in Scotland, as shown in Table 7. This indicates that the average journey fare in the region is £31.99, the highest out of all regions, although the region has one of the lowest average fares per mile at £0.22<sup>48</sup>.

**Table 7: Local and Regional Fares**

Region	Local		Regional		Fare per mile Ratio (Reg/Loc) <sup>49</sup>
	Average Journey Fare	Average Fare Per Mile	Average Journey Fare	Average Fare Per Mile	
Argyll and Bute	£3.62	£0.23	£10.52	£0.21	93%
<b>Ayrshire</b> and Arran	£3.39	£0.30	£6.79	£0.20	67%
Edinburgh and South East Scotland (incl. South Fife)	£4.63	£0.31	£10.91	£0.23	74%
Forth Valley City	£3.15	£0.41	£7.37	£0.24	58%
Glasgow City	£2.98	£0.34	£8.46	£0.23	66%
Highlands and Islands	£6.42	£0.20	£31.99	£0.22	111%
North East of Scotland	£4.26	£0.28	£28.36	£0.26	93%
Scottish Borders	£1.83	£0.44	£10.87	£0.21	48%
South of Scotland (incl. Scottish Borders and Dumfries & Galloway)	£3.16	£0.28	£12.68	£0.19	66%
Tay Cities (incl. North Fife)	£5.55	£0.30	£16.17	£0.25	85%
South West of Scotland (Dumfries & Galloway)	£5.06	£0.24	£14.21	£0.17	72%

During stakeholder engagement, a number of stakeholders also highlighted the view that the bus concessionary travel scheme was not equitable, particularly for island residents where travel options are more limited. It has been said that a person with a concessionary

<sup>47</sup> All aboard: Young People's views and experience in Public Transport in Scotland, HITRANS Region Summary, Scottish Youth Parliament, (2019)

<sup>48</sup> Data sourced from MOIRA 2.2.

<sup>49</sup> The ratio of the average regional fare per mile to the average local fare per mile.

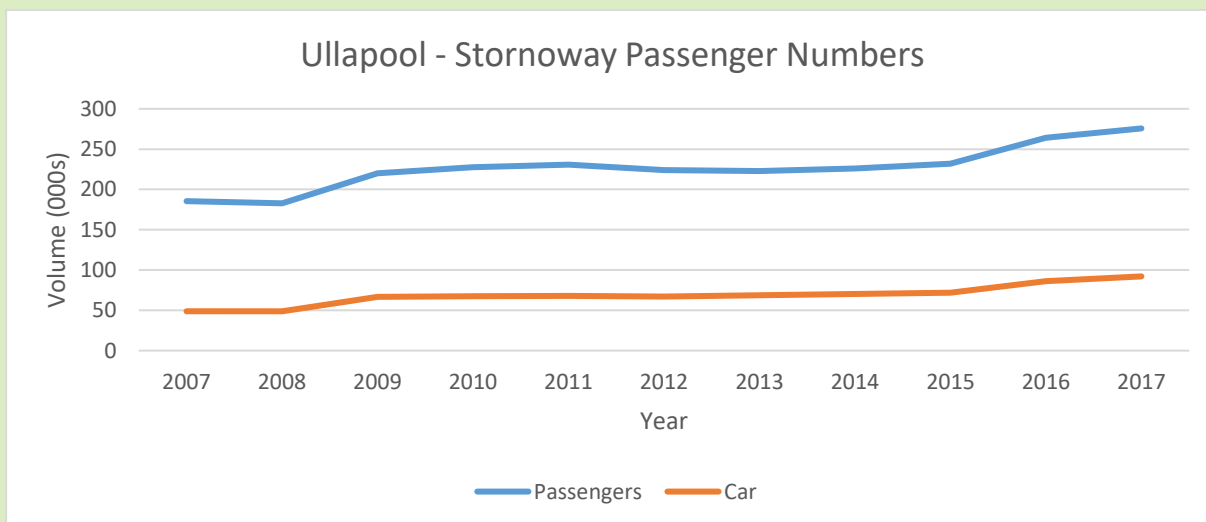


pass in Edinburgh could travel across Scotland for free, but a person eligible for the concessionary fare scheme living in Orkney cannot always get off the island.

**Capacity Constraints**

During the extensive stakeholder engagement undertaken across the region, a wide range of multi-modal capacity constraints have been highlighted.

Passenger numbers on ferries have been increasing since the introduction of the RET in the Eilean Siar. As shown in Figure 31<sup>50</sup>, there has been a large increase in passenger numbers and particularly vehicle numbers on the Ullapool-Stornoway ferry. As the vessel operates two passengers service during the day and a freight run at night, there is limited resilience should the vessel break down or be delayed, with consultation highlighting that it is becoming very difficult for residents and businesses in Eilean Siar to book spaces on the vessels throughout the busy summer period. Concerns have been raised in particular around the impacts of increased campervan numbers since the introduction of the RET given that they take up a larger amount of deck space and reduce availability for other users. RET is not currently available on routes to the Orkney Islands or for internal ferries within Orkney.



**Figure 31 Passenger and Car numbers of Ullapool to Stornoway Route by year**

Other capacity-related issues associated with ferry services in the region highlighted during stakeholder engagement included issues for residents and businesses wishing to travel on the NorthLink services all year round, as well as capacity issues for freight, particularly given the increasing demand from aquaculture and fishing sectors in Shetland. Anecdotally it has been reported that containers are being left at the pier side due to capacity issues. With regards to the inter-isles ferry service in Orkney, it has also been reported by stakeholders that Westray residents and businesses struggle to book vehicles on their service as it is operating at capacity. As outlined in Section 2.5, a detailed review of ferry data is currently being co-ordinated as part of STPR2, which will provide a baseline of island connectivity for future planning.

<sup>50</sup> Scottish Transport Statistic No 37 2018 Edition, Chapter 9, Transport Scotland <https://www.transport.gov.scot/publication/scottish-transport-statistics-no-37-2018-edition/chapter-9-water-transport/#tb916>



Air services, particularly from Orkney, were also said to be at capacity during stakeholder engagement, and there has been a 19% increase in passenger numbers since 2012, as shown earlier in section 2.5.

A perceived lack of safe overtaking opportunities on sections of the trunk road network, including for example the A95, associated with the standard or carriageway and the mix and composition of vehicles, including high proportions of HGVs<sup>51</sup> as well as agricultural traffic, has also been noted as a problem during engagement. Limited safe overtaking opportunities can lead to increased journey times and safety concerns.

Table 8 shows the average peak traffic volume growth between 2012/13 and 2017/18 on the trunk roads in the Highlands and Islands region compared to the Scottish average<sup>52</sup>. This indicates that traffic volumes have grown significantly faster in the region than in Scotland as a whole particularly in peak tourist season, where traffic levels are known to be higher throughout the region.

**Table 8: Highlands and Islands vs Scotland % Peak Hour Traffic Flow Changes 2012/13 to 2017/18**

Peak Flow %age Change	2012/13 to 2017/18 AM (0800 – 0900) % Change	2012/13 to 2017/18 Inter Peak % Change	2012/13 to 2017/18 PM (1700 – 1800) % Change
H&I Average	15.7%	21.7%	21.3%
Scotland Average	0.3%	11.2%	2.5%

The road network in the region is particularly susceptible to seasonal congestion and delay associated with increased visitor numbers, particularly during the summer months, holiday weekends and at times of major events. This is noted as being a particular problem in Fort William on the A82 and A830, where journey times can increase significantly, particularly southbound, as a result of congestion at certain points in the peak tourist seasons. Journey time analysis<sup>53</sup> has shown that there are higher levels of travel time variability for south/westbound journeys compared to north/eastbound journeys. Journey times also illustrate that seasonal variability is most pronounced in the south/westbound direction, with variability of 20 minutes for southbound travel times on the approach to the A830 roundabout shown for August 2017. These effects are greatest during the period from late morning through to early evening.

<sup>51</sup> Department for Transport. Road Traffic Statistics, 2000 – 2018.

<sup>52</sup> NTDS ATC Data.

<sup>53</sup> INRIX Journey Time analysis as part of the Fort William Pre-Appraisal Study.

While tourism brings significant benefits to the region, consultation highlighted concerns regarding the potential impacts on road quality and condition. A marked example of the changes in traffic volumes and visitor numbers can be found from the success of the North Coast 500 (NC500) route which has been marketed as a scenic road trip round the Highlands using both local and trunk roads. A report into the impact of the NC500 in the North Highlands undertaken by HIE<sup>54</sup> states the following:

- The route attracted 29,000 additional visitors and £9 million additional spend in its first year.
- There had been an average increase of 26% in visitor numbers along the route since it opened in 2015.
- Traffic data has shown that annual traffic volumes along the route increased by 10%.

### Journey Times

Journey times by road, bus and rail have been described as long by stakeholders. This is partly due to the longer distances between origins and destinations but also due to constraints in the transport network. Stakeholders have reported that frustration arises where the length of the journey prevents meaningful visits to services especially where services have been centralised. During stakeholder engagement there was an acknowledgement that people living in rural areas accept that distances to access employment and services are greater relative to those in urban areas. However, stakeholders felt that journey times could be improved.

Across the region it is commonplace to have to spend a disproportionate amount of time travelling by car per miles driven compared to other parts of the country. Elgin to Inverness is a 38 mile long journey but takes 61 minutes. Thurso to Inverness is a 111 mile journey but takes 147 minutes. The miles driven per minute is lower for journeys from the region's towns to Inverness (average of 0.72 miles per minute) than the journey from Inverness to the Central Belt (average of 0.84 miles per minute for travel from Inverness to Edinburgh, Glasgow, Perth and Stirling). The average miles per minute for travel from Fort William to the Central Belt is 0.72, which is lower than from Inverness. Journey times by road on the islands were also highlighted as an issue during stakeholder engagement, particularly during the tourist season associated with the high proportion of single track roads on the islands.

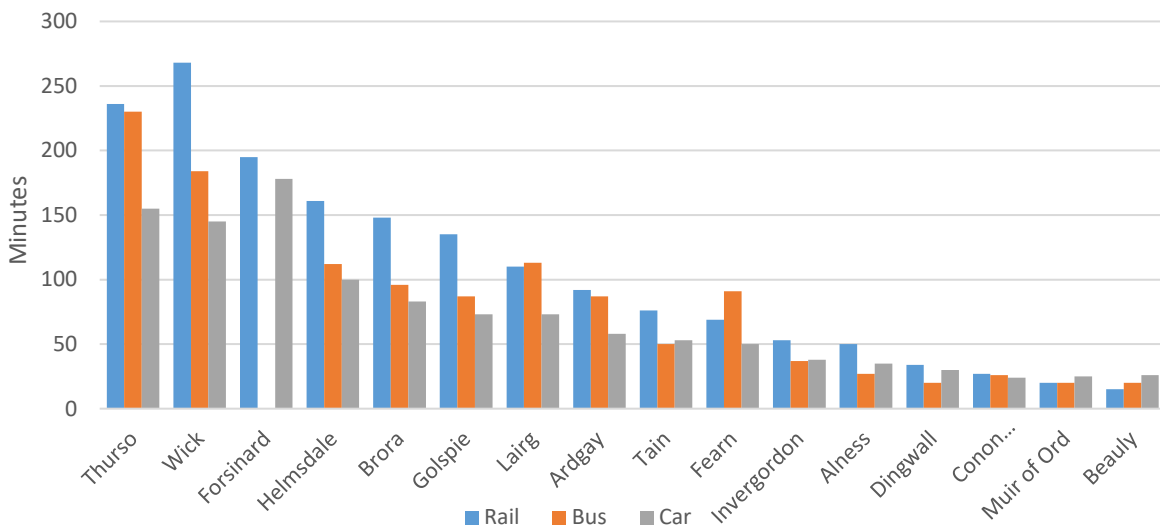
Journey times by rail have also been highlighted as a problem, with rail generally considered to be an unattractive alternative to the car. The Far North Line in particular has been noted as having very slow journey times, as have journeys from Elgin to the Central Belt, with stakeholders highlighting that journey times between Edinburgh and London (4hrs 20 minutes) by train, which is twice as far away, takes approximately the same time<sup>55</sup> (Elgin to Edinburgh journey time is 3 hours 56 minutes)<sup>56</sup>.

<sup>54</sup> <https://www.hie.co.uk/latest-news/2017/june/19/impact-of-north-coast-500-route/>

<sup>55</sup> Train times checked at national rail enquiries on the 06/02/2020.

<http://ojp.nationalrail.co.uk/service/timesandfares/EDB/London/130220/0700/dep>

<sup>56</sup> Rail times calculated using ScotRail timetable. Bus times were calculated using Traveline. Drive times are based on a 1pm departure on a Wednesday, calculated using Google Maps.



**Figure 32: Far North Line Journey Times to Inverness**

(Click image to enlarge figure)

Figure 32 shows the average journey times by car, bus and train from stations on the Far North Line to Inverness. This highlights that all journeys are quicker by road, and particularly car in most cases, as far south as Dingwall, where journey times start to even out, before rail becomes the quicker option at Muir of Ord. Average journey times from Thurso to Inverness by car are around two and a half hours compared to nearly four hours by rail.

A comparison of rail journey times to bus and car for other Lines in the region has also been undertaken, with key findings summarised below:

- On the **Kyle Line**, journey times by road are generally faster than rail from Kyle of Lochalsh to Inverness. From Dingwall onwards, rail journey times start to become more competitive with cars, where the Kyle Line joins the Far North Line.
- On the **West Highland Line**, journey times between Fort William and Glasgow are considerable faster by road than rail. When travelling to Fort William from Mallaig, road is generally faster than rail. Rail journey times start to become more competitive with car around Corpach.
- On the **Highland Main Line**, rail times are considerably faster than bus and faster than private car from Perth to Inverness. This is due to higher line speeds, compared to other routes. This trend may reverse when the A9 is dualled, reducing the speed differential between the modes. Bus journey times are uncompetitive on this route, which may be due to the number of stops and the routing of the services.
- The **Aberdeen to Inverness Line** has more competitive journey times by rail, with these being at least twice as fast as the bus and considerably quicker than car journeys. This is mainly due to slower journey times on the A96.

A review of travel times by rail, bus and car from Inverness to the Central Belt shows that journey times are generally comparable across all modes, however car is slightly faster to all destinations. Travelling to Glasgow is slightly more competitive by rail as rail journey times between Perth and Edinburgh are longer than those by car. Journey times between Perth and Glasgow are similar between road and rail.



Train services from the region converge on Inverness, with the exception of the West Highland Mainline. To travel to the Central Belt by rail, the majority of the region is required to change train in Inverness. As journey times from the North and West of the region to Inverness are disproportionately long by rail, journeys to the Central Belt become more competitive by car. The lack of a direct service from most of the region to the Central Belt introduces additional time to the journey by rail as passengers are required to wait in Inverness. The long journey times contribute to poor connectivity within the region, especially travelling to the Central Belt for a full working day.

Long journey times were also noted to be an issue that affect island communities and was noted as a particular issue in Eilean Siar where journey times between the islands were said to be just as long as journey times to the mainland; for example travelling between Barra and Stornoway can typically take six hours. It was also highlighted that in Orkney, current levels of transport connectivity mean that Stronsay and Eday are often served together and therefore suffer from very long journey times – up to three hours – to get to Kirkwall. It was also reported that it is not always possible to make a day trip to an island or to Orkney Mainland, which impacts on businesses located on the islands or suppliers travelling to the islands, while there are also limited opportunities to make trips between the islands despite there being many family connections between the islands.

### Resilience

The resilience of the strategic road network, including routes such as the A82, A87 and A9 North of Inverness, was highlighted as a problem during stakeholder engagement due to the lack of alternative options which results in long diversionary routes in the event of road closure. Any diversions or delay have an impact on the reliability of all journeys, including trips by private car, public transport, as well as freight; the latter of which is heavily dependent on road to provide access to key destinations, including ports and harbours across the region.

Diversion route information is presented in Table 9 and illustrates the additional distance and journey time impact of route closures in the region; resilience is an issue particularly on the A82 and A87 with four of the longest diversion routes occurring on the A82 and the fifth longest diversion route occurring on the A87.

**Table 9: Diversion Routes<sup>57</sup>**

START POINT	END POINT	IMPACT	EXISTING ROUTE	DIVERSION ROUTE	DIFFERENCE
A82/A830 Fort William	A82/A86 Spean Bridge	Journey Time	12 mins	300 mins	278 mins
		Journey Distance	7 miles	194 miles	187 miles
A82/A828 Ballachulish	A82/A830 Fort William	Journey Time	30 mins	285 mins	255 mins
		Journey Distance	15 miles	187 miles	172 miles
A82/A828 Spean Bridge	A82/A87 Invergarry	Journey Time	25 mins	220 mins	195 mins
		Journey Distance	15 miles	136 miles	121 miles
A82/A887 Invermoriston	A82/A831 Drumnadrochit	Journey Time	22 mins	200 mins	178 mins
		Journey Distance	13 miles	127 miles	114 miles
A87/A887 Bun Loyne	A87/A890 Auchertyre	Journey Time	45 mins	190 mins	145 mins
		Journey Distance	31 miles	114 miles	83 miles

As shown, in the event of an incident that leads to road closure between Fort William and Spean Bridge, the diversionary route is 187 miles (just under five hours) longer than the original route.

With regards to the rail network, none of the rail stations in the region (included in the Train Time Reliability by station list<sup>58</sup>) recorded more than 72% of trains arriving on time. Aviemore had the lowest proportion of trains arriving on time, at only 35%, with Wick (46%) and Elgin (67%) also recording reliability issues. During stakeholder engagement, it was frequently suggested that a lack of double tracking of the rail network makes it difficult for trains to make up lost time, which in turn leads to reliability issues, particularly at stations in the middle sections of their route, such as Aviemore and Elgin.

In addition to reliability issues, a number of sections of the railway network are prone to closure during periods of adverse weather. In August 2019, for example, sections of the West Highland Mainline around Crianlarich and Tyndrum were closed for around two weeks due to flooding and landslips. While replacement bus services are put into place during such incidents, journey times are adversely affected.

The impact of ferry and air service cancellations was frequently highlighted during stakeholder engagement as being an issue which affects island life, from limiting access to employment, healthcare and other services to adversely impacting the supply of goods and limiting economic development opportunities, including tourism. Specifically, a review of the average age of vessels deployed on the Orkney Inter-Isles ferry service indicates

that the average age of vessels is over 30 years<sup>59</sup>, with the ageing nature of the fleet in terms of service resilience and reliability highlighted as a concern during stakeholder engagement.

### Public Transport Frequency and Integration

The lack of and limited frequency of public transport, bus services in particular, is a problem particularly in rural areas. Routes around Wick and Caithness were specifically highlighted by stakeholders, however the problem exists across the region. Bus services do not operate at desired times such as early enough to make rail connections or late enough in the evenings to allow for activities to be undertaken after school/work or to access shift work. Local services in Elgin for example do not run early enough to access the early Elgin to Inverness train and then onward connections to the Central Belt. It was suggested by stakeholders that understanding demand is a challenge, and as a result there is a limited understanding of when services should be scheduled to operate.

To support an understanding of public transport accessibility to key services, accessibility analysis using TRACC<sup>60</sup> has been undertaken. As presented in Section 2.3.5 which shows the accessibility to key employment centres within the region by public transport on a typical weekday morning, within two hours, the majority of the Highlands and Islands region cannot access a key employment centre by public transport, with large areas in the north and west of the region on the mainland having no access to key employment centres. The same applies to islands. For example, in Eilean Siar, there is a lack of public transport access to Stornoway south of Tarbet on the Isle of Harris. This provides significant challenges to those within the region and increases the reliability on the private car, as there are no viable alternatives.

In terms of access to healthcare, the TRACC analysis shows that generally residents living near the main road network can access some form of healthcare at a GP or Hospital within 120 minutes by public transport. However, large parts of the region, distant from major settlements, cannot access healthcare services within 120 minutes, and this is particularly the case when considering access to specialist healthcare, with access to certain types of healthcare from some areas in the region, particularly the islands, requiring access by air, which can be expensive. This is not only an issue for those accessing the healthcare services, but also those wishing to visit friends and relatives in hospital.

Integration of public transport services has also been highlighted as a problem, with examples including:

- A lack of public transport connections at Scrabster and Gills Bay; while it was noted that there used to be a bus linking Scrabster with Thurso rail station, passengers currently require to use a taxi to make this journey. It has also been noted that there have been issues with a lack of bus service to meet the Pentland Ferries vessel at Gills Bay, leaving foot passengers stranded.

<sup>57</sup> Journey times based on travel on a weekday at 1pm. Source: Scotland TranServ / BEAR Scotland Standard Incident Diversion Routes and Google Maps.

<sup>58</sup> Source – Time Reliability by Station statistics.

<sup>59</sup> The Fleet. Orkney Ferries. Available at: [http://www.orkneyferries.co.uk/the\\_fleet.php](http://www.orkneyferries.co.uk/the_fleet.php)

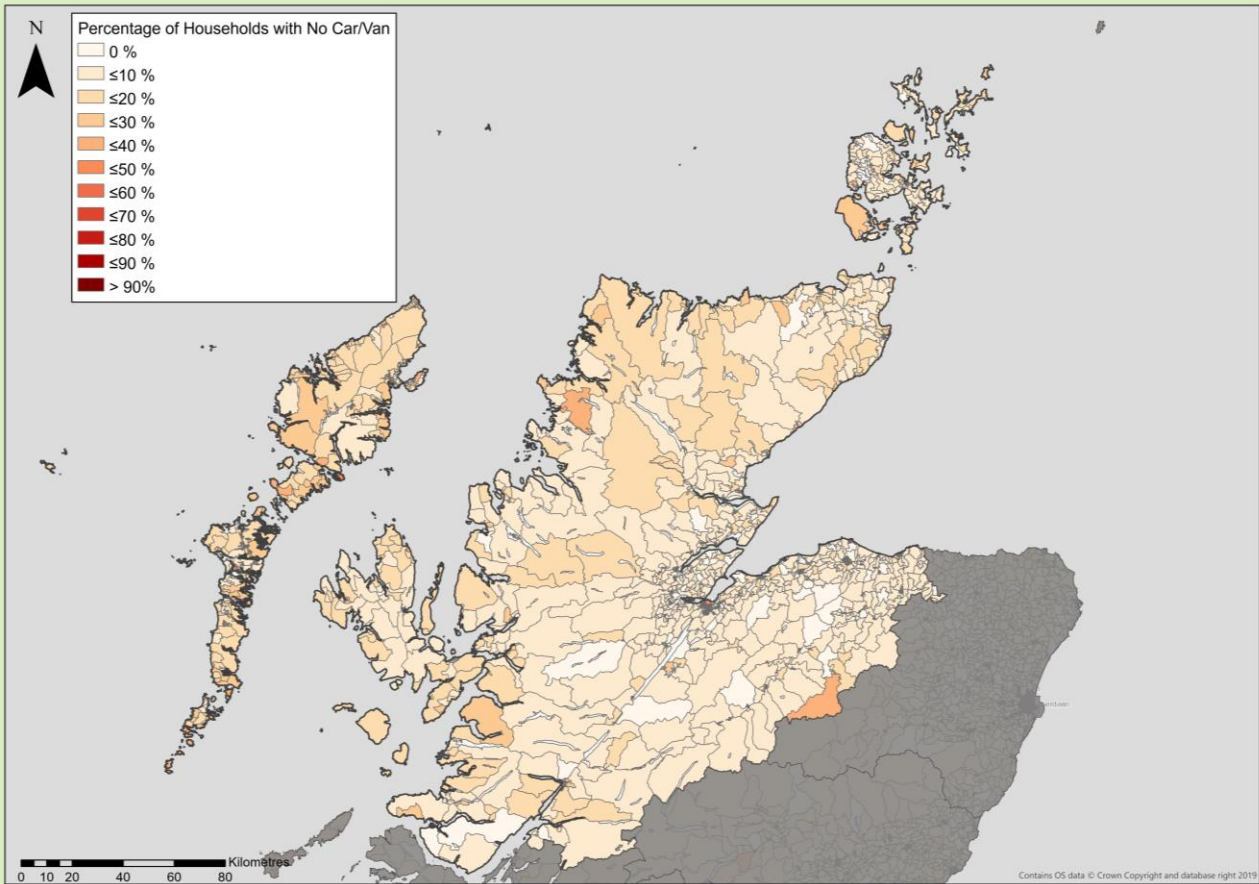
<sup>60</sup> TRACC - multimodal accessibility and journey time analysis tool.



- Poor integration of rail and bus services between Mallaig and Inverness. Although the train runs straight from Mallaig to Glasgow, this takes over five hours, and buses between Mallaig and Fort William often do not connect with those between Fort William and Glasgow.
- Poor alignment of rail services from Invergordon to Inverness with cruise ship arrivals.

### Dependence on Private Car

The geography of the area, the centralisation of key services, and the lack of frequent public transport access means that many in the region are dependent on cars and often dependant on more than one car per household.



**Figure 33: No Car Ownership in the Highlands and Islands**

(Click image to enlarge figure)

Figure 33 shows the percentage of households that do not own a car or van. Most of the data zones (76%) have less than 30% (Scottish average) of households not owning a car or van, highlighting the high car ownership in the region<sup>61</sup>.

Data zones with highest levels of no car ownership can be found in urban areas such as Inverness city centre, Kirkwall and Thurso as services are physically closer and there are alternative modes of transport to reach them.

In order to reduce reliance on the private car, particularly for short journeys, potential opportunities to develop the active travel network was highlighted. However, during stakeholder consultation, it was noted that available funding for the scale of active travel projects desired to improve walking and cycling for communities across the region can present challenges. With many of the communities in this region being classified as remote rural, these linkages would be necessarily lengthy and costly when delivered to the standard necessary to secure funding support. Local Authorities have also highlighted that there are difficulties in providing the match funding often necessary to finance schemes due to competing pressures on Local Authority budgets.

### 3.2.2. Online Survey: Reported Problems in the Highlands and Islands Region





As part of the wide-ranging engagement exercise undertaken for STPR2, an online survey was promoted to collect the views from the public and organisations across Scotland on the transport issues and challenges that impact their day to day journeys. As part of the survey, respondents were asked to rank their top three priority problems.

Top ranking problems for the Highlands and Islands region included:

- **Roads - Quality of roads infrastructure**, which 62 respondents ranked as their top priority and 95 ranked within their top three;
- **Cycling - Availability of safe cycling infrastructure**, which 54 respondents ranked as their top priority and 92 ranked within their top three;
- **Bus - Frequency and reliability of bus services** which 37 respondents ranked as their top priority and 92 ranked within their top three;

Other commonly raised areas of concern related to cost of rail travel, availability of safe walking/wheeling infrastructure, accessibility to key services by bus, and availability of funding to maintain existing transport assets.

The findings from the survey have been used to inform and further validate the identification of the transport related problems described in this section.

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<sup>61</sup> Census 2011 (Scotland) <https://scotlandscensus.gov.uk/>



### 3.2.3. Opportunities

This section provides a summary of key opportunity themes identified for the Highlands and Islands region.

#### ECONOMIC GROWTH

There are a number of strong growth sectors within the Highlands and Islands, with the region performing particularly well in terms of food and drink production, tourism, and energy production.

In terms of food and drink production, the agriculture, forestry and fishing industries made up more than one in ten jobs in the region in 2017, with particular growth anticipated in the aquaculture industry, which is expected to grow 50% by 2035. Another important aspect of food and drink production for the region is the whisky trade. Whisky is a high value product, for which Scotland is globally renowned. Whisky production contributes significantly to the Scottish economy and that of the Highlands & Islands region. This is particularly true in Moray, where the popularity of Speyside whiskies has contributed to tourism in the area through the development of the region's Malt Whisky Trail, with Moray alone home to around 44% of all Malt Whisky distilleries in Scotland, supporting around 1500 jobs<sup>62</sup>.

Tourism is also a growth sector for the region in its own right. In 2017, 2.1 million people visited the Highlands and Islands; which made up around 20% of all visitors to Scotland. During 2018, The Highland Council area welcomed 521,000 international visitors, totalling just over 2 million bed nights and a spend of £195 million. This was around 15% in terms of volume and just under 9% in terms of value of total international tourism in Scotland for 2018<sup>63</sup>. In 2017, the Western Isles saw 148,641 visitors and these visitors spent just over £51 million over the year<sup>64</sup>. The Orkney Islands welcomed 174,273 visitors in total in 2017, who spent just under £50 million<sup>65</sup>, not counting the many cruise line passengers who also chose to spend time on the island. The sustainable tourism sector employed 16,000 people in The Highland Council area and 3,000 in the Moray Council area in 2016, and brought in approximately £320 million GVA. This is clearly an important sector to both the regional and national economy. Both the number of visitors travelling from within the UK, and the number of international visitors to the region have increased over recent years. On average, visitors spent four days in the region; higher than the Scotland average of 3.3 days.

<sup>62</sup> Highlands and Islands Enterprise 2019-2022 Strategy, available at <http://www.hie.co.uk/about-hie/our-priorities/developing-growth-sectors/default.html>

<sup>63</sup> Highland Factsheet. Visit Scotland (2019). Available at: <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/regional-factsheets/highland-factsheet-2018.pdf>

<sup>64</sup> The Outer Hebrides Visitor Survey 2017. Comhairle nan Eilean Siar and Visit Scotland. Available at: <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/outer-hebrides-report---may-18.pdf>

<sup>65</sup> Orkney Islands Visitor Survey 2017. Orkney Islands Council and Visit Scotland. Available at: <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/orkney-exec-summary---may-18.pdf>



As part of the STPR2 engagement process, the opportunity to increase the number of tourists using more sustainable modes, including active travel, bus and rail was highlighted. This untapped demand for public transport amongst tourists could contribute to higher public transport usage, potentially improving the commercial viability / value for money of any public transport improvements to address transport problems in the area. This in turn would help to improve visitor experience, encouraging tourists to return to the region and recommend the region to others, helping to grow the tourism industry further.

Findings from HIE's regular Business Panel Surveys of at least 1,000 businesses and social enterprises in the Highlands and Islands highlight the critical role of transport infrastructure to the regional economy. When firms were asked about measures that might encourage them to make future investment, some 40% highlighted investment in transport infrastructure as an important enabler<sup>66</sup>. This suggests that economic growth would be stimulated where locations are made more attractive through transport improvements.

Conversely, poor transport links can threaten the short and long term outlook for economic and population growth. Many island-based firms have reported that transportation issues such as disruption to travel due to ferry cancellations have been factors that have caused their business to struggle<sup>67</sup>. When asked to consider risks to their business within the next year or two, around two-thirds (65%) of panel respondents highlighted poor transport links.

## AVAILABILITY OF RENEWABLE ENERGY

Another growth sector for the region is the energy sector, with particular opportunities in renewable energy to draw on transferrable skills from the oil and gas sector, as renewable sources become more prevalent, securing future employment opportunities<sup>68</sup>.

The Orkney Sustainable Energy Strategy 2017 – 2025<sup>69</sup> illustrates the commitment to developing and harnessing renewables in the region. The Strategy outlines the progress that has been made; with it being noted for example that the Orkney Islands have the largest number of electric vehicles per capita in the UK, but also the opportunities for improvement.

Figure 34 shows the average distance to electric vehicle charging points for the region, demonstrating that although some areas, including parts of Orkney, Elgin, and Wick, have good accessibility to charging points, there are large areas, particularly to the west of the region, where there is limited charging infrastructure.

<sup>66</sup> HIE Business Panel Survey, Wave 7:

<https://www.hie.co.uk/media/3043/hieplusbusinesspluspanelplussurveyplus-plusoctplus2017plus-plusreport.pdf>

<sup>67</sup> HIE Business Panel Survey, Wave 8:

<https://www.hie.co.uk/media/3041/hieplusbusinesspluspanelplussurveyplus-plusjulyplus2017plus-plusreport.pdf>

<sup>68</sup> HIE. Investment in Energy. <http://www.hie.co.uk/growth-sectors/energy/>

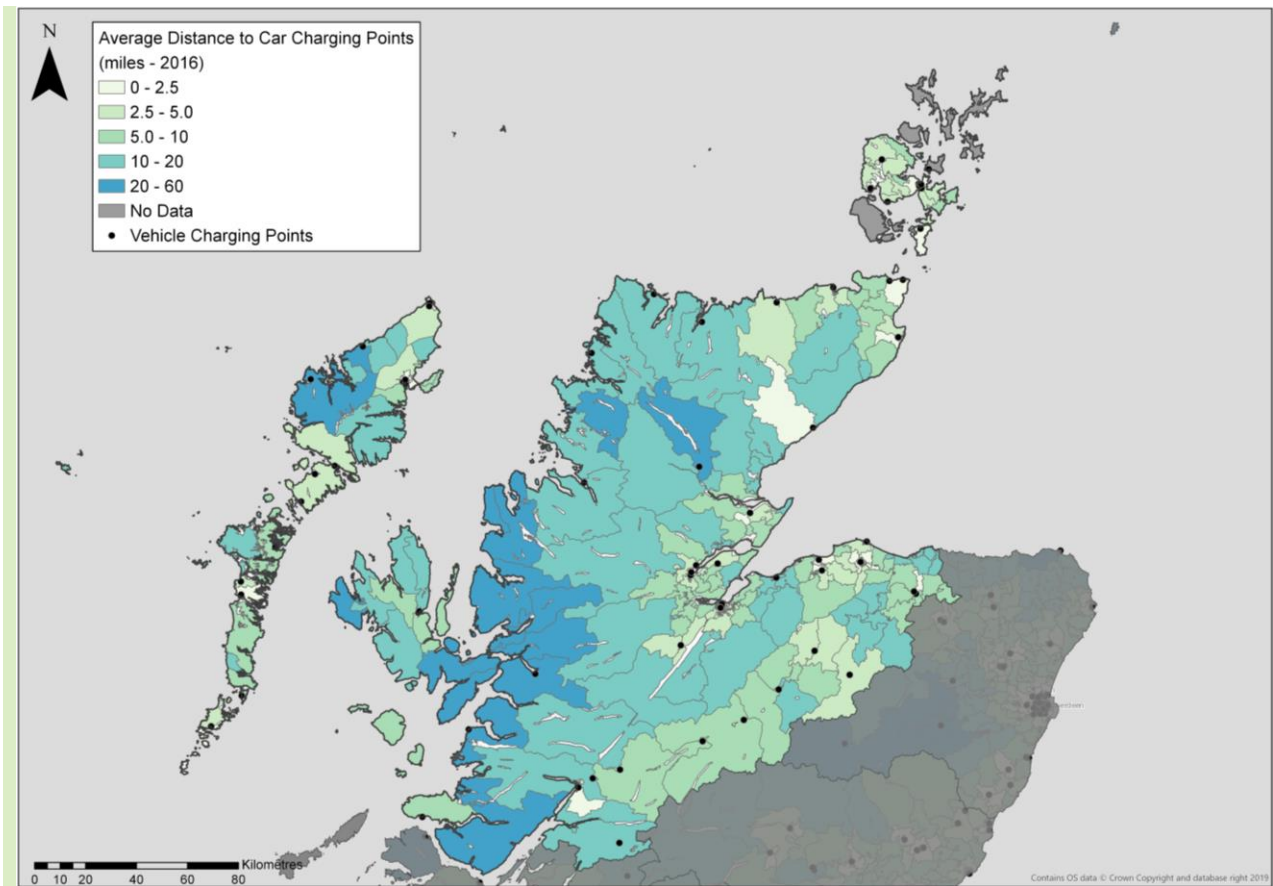
<sup>69</sup> Energy of Orkney. Orkney Sustainable Energy Strategy 2017 - 2025.

<http://www.oref.co.uk/wp-content/uploads/2017/10/Orkney-Sustainable-Energy-Strategy-2017-2025.pdf>



The region has high rates of car ownership, with only 20% of households without a car, compared to 31% in Scotland as a whole, and 33% owning more than one car, compared to 27% for Scotland as a whole. CO<sub>2</sub> emissions per capita for The Highland Council Area were the lowest in Scotland at -4.2 to -2.5 kilotons (kts). In Moray Council, CO<sub>2</sub> emissions were to 2.5 to 5 kts per capita. Orkney and the Western Isles both had slightly higher emissions at around 10 to 12.5 kts per capita, however in the Orkney Islands, a strategy has been developed focused on reducing the Island's carbon footprint. Further decarbonising the transport fleet presents further opportunities to move towards net-zero. The region is uniquely positioned to generate renewable energy and take advantage of this.

Approximately 2% of trips to work in the region are made by bike and 11% on foot, both of which are slightly higher than the national average. However, only 4% of trips are made by bus and 1% by rail (compared to the national averages of 10% and 4% respectively). Accessibility to public transport has been highlighted as a significant issue in the region and modal shift may be a particular issue in this region given its rural nature. Improving public transport presents the opportunity to contribute to the increase the number of people in employment, particularly in rural areas. As noted previously, for example, there is a higher proportion of people working from home and travelling very short distances to work in the region (under 2km), with 5% and 4.4% more than the national benchmarks respectively, presenting an opportunity for modal shift to active travel. The shorter travel distances associated with living on some island locations, supported by the renewable energy potential of island regions provides a clear opportunity to increase transport to more sustainable modes and those with lower carbon energy sources. This can also be said for key rural towns and communities in the region such as Elgin, Lossiemouth, Fochabers, Keith and Fort William particularly where they are compact and there is the potential for short journeys to be made by active travel.



**Figure 34: Average Distance to Charging Points**

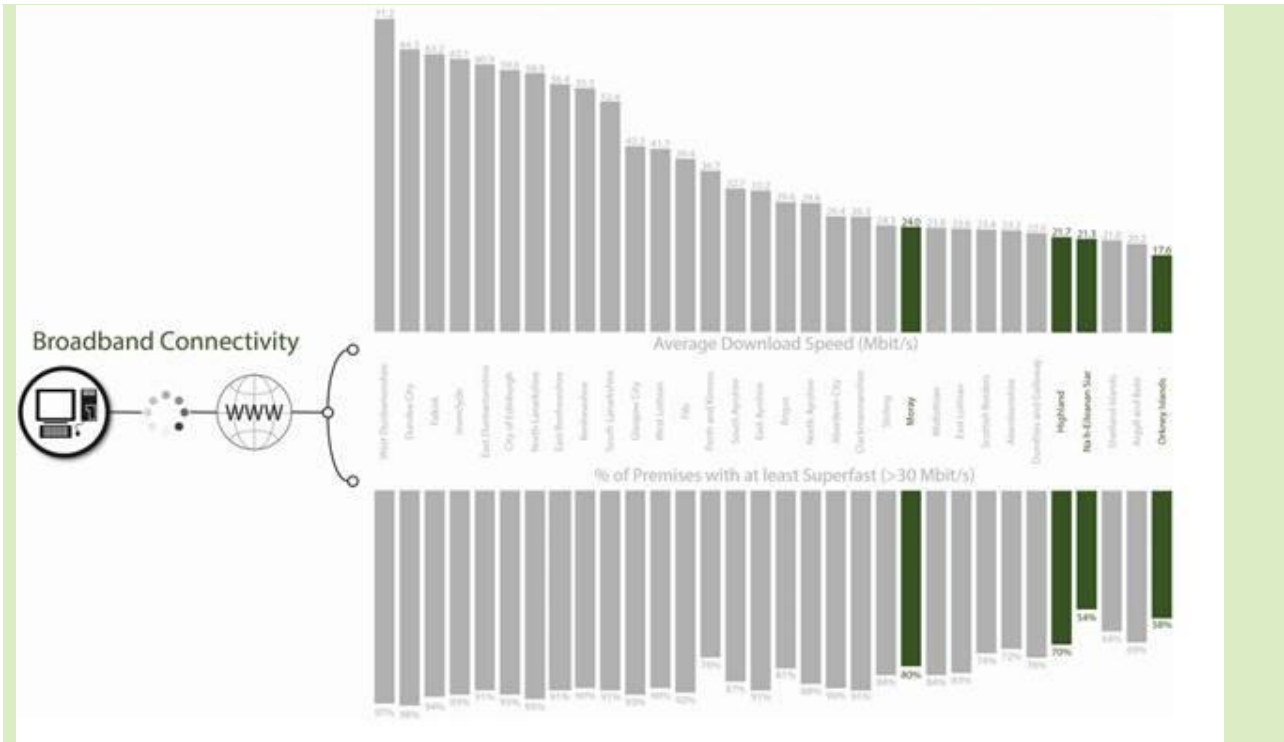
(Click image to enlarge figure)

### DIGITAL CONNECTIVITY

Technology opportunities include understanding how future technologies could impact transport, how technology could be used to improve transport, and how to future-proof transport by taking steps now to prevent problems in the future.

The opportunities brought by improving broadband access and speed was frequently highlighted during stakeholder engagement, including the potential benefits of increased levels of working from home. As shown in Figure 35, there is scope to increase digital connectivity in the region. All local authorities in the region sit in the bottom half of the table. Highland, the Western Isles and the Orkney Islands make up three of the five local authorities which have the lowest average download speed and the lowest percentage of households with superfast broadband.





**Figure 35: Broadband Connectivity (Highlands and Islands Local Authorities vs All Local Authorities)**

The potential for technology to increase the efficiency of collecting and using data was also highlighted, with opportunities to share data across modes and organisations to improve provision and better understand travel demand. Digital advances could also have an impact on public transport demand. Real time tracking of buses, for example, could instil confidence in services by providing updates to the user, and enabling users to plan their journey with greater certainty. Applications that allow the user to view journey times and real-time information (such as road closures, delays or diversions) not only on bus but across modes would be welcome in the region.

**3.2.4. Problems & Opportunities Summary**

- **Connectivity:** SIMD data highlights that one third of data zones in the Highlands and Islands region are ranked amongst the lowest 10% in Scotland. The centralisation of services, in particular medical services, facilitates this problem with many residents having to travel longer distances to reach these services. Timing and availability of public transport also restrict connectivity between the mainland and the islands, with residents having trouble completing a full working day in the central belt due to long journey times.
- **Transport Poverty:** Transport expenditure and poverty is generally higher in rural parts of the region. The majority of data zones spend between 17-18% of their budget on transport, compared to the national average of 14%. This issue is exacerbated by high fuel costs within the area
- **Capacity Constraints:** Air and ferry services have been highlighted as suffering from capacity problems in the region. Passenger numbers on ferries in the Western Isles have been increasing since the introduction of RET while passenger numbers on



ferries services to Orkney were also highlighted. Capacity of air services was also highlighted as an issue, with utilisation of flights to Orkney increasing by 19% since 2012. Capacity issues were highlighted on the road network particularly during the peak tourist season. This is an issue on both the mainland and the Islands, with the single track road network on the islands being put under pressure by additional vehicles and cyclists.

- **Journey Times:** Longer distances between origins and destinations in addition to capacity constraints on the network result in long journey times in the region. Stakeholder highlighted that It is not unusual to spend a disproportionate amount of time travelling by car per miles driven compared to other parts of the country. Journey times from the region's towns to Inverness on average is 0.72 miles per minute, compared to the central belt with an average of 0.84 miles per minute. Rail services are also highlighted as having a disproportionately high journey time compared to other regions due to the lack of dual tracked.
- **Resilience:** Lack of resilience of the road network and ferry network have been brought up throughout the region as a problem. Road closures on the A82, A87 and A9 North lead to long diversionary routes. A road closure between Fort William and Spean Bridge (12 miles) can cause a 278 mile diversion. Ferry and air cancellations are an issue for islanders, for whom, it limits access to employment and healthcare and can impact the running of businesses.
- **Public Transport Frequency and Integration:** A lack of public transport prevents access to services and can lead to forced car ownership. There is limited integration between public transport, particularly in rural areas, and limited interconnectivity between bus, rail and ferries with low frequency and limited operating hours. Bus patronage has fallen in recent years and bus mileage, bus connectivity and bus quality have been cited by stakeholders as contributory factors to this decline.
- **Dependence on Private Car:** Centralisation of services combined with the size of the area and low population density makes it difficult to provide an attractive public transport system within the region, resulting in a high car ownership. Car ownership data shows that the areas with the lowest levels of car ownership are found in urban areas where services are physically closer and where there are alternative modes to reach them.
- **There are opportunities associated with:** Economic growth, particularly in relation to active travel tourism; Digital connectivity, and the availability of renewable energy such as Orkney's commitment to developing and harnessing energy from renewable sources set out in the Orkney Sustainable Energy Strategy 2017 - 2015.

### **3.2.5. Future Conditions**

The problems and opportunities identified above are focused on current issues drawing on the findings from data analysis and engagement. Given the timescales for the delivery of STPR2, there is a need for 'horizon scanning' to better understand how potential future uncertainties could impact the operation and management of the strategic transport network, a knowledge of which will support the identification of interventions that are resilient in the face of potential alternative futures. This process of scenario planning will consider major disrupters and uncertainties (e.g. alternative working practices, new



transport technologies, future transport policy developments) and is accordingly being carried out at a national level for the STPR2 programme as a whole.

For the Highlands and Islands region, a review of the national transport model, the Transport Model for Scotland (TMfS), has suggested that between 2014 and 2037, the following trends have been projected<sup>70</sup>; this assumes that current policies remain in place and no interventions beyond those already committed will be undertaken:

- Road Traffic (billion vehicle miles p.a.): a 36.4% increase in the region, on par with the national average growth of 37.3%.
- Road Delays (PM Peak Road Delay seconds/mile): a 58.1% increase in the region, higher than the 36.5% rise forecast across Scotland.
- Bus Passenger mileage forecasts: a 1.6% increase, in contrast to a decline of 5.1% across Scotland.
- Rail Passenger mileage forecast: a 28% increase, lower than the national increase of 42.1%.

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<sup>70</sup> Transport Scotland. Transport Forecasts 2018. <https://www.transport.gov.scot/media/43316/transport-forecasts-2018.pdf>



## 4. Transport Planning Objectives

### 4.1. National and Regional Objectives

Transport Planning Objectives (TPOs) are of central importance to the STAG process. In line with STAG, TPOs should align with the outcomes sought by the study, be based on a comprehensive and evidenced understanding of problems and opportunities and lend themselves to inform a clear and transparent appraisal of transport options. The TPOs are a key element of the appraisal process from initial option identification and sifting through to Preliminary and Detailed appraisal and subsequent monitoring/evaluation.

For STPR2, TPOs have been developed to sit at both the national and regional levels. At a national level, an overarching set of programme-level TPOs, supported by national sub-objectives, have been established which are closely aligned with the four priorities, twelve outcomes and twenty four policies contained within the National Transport Strategy (NTS2). The national TPOs are presented in Table 10 below.

A series of regional transport planning objectives sit within the overall direction of the national objectives but with a particular focus on the specific evidence-based problems and opportunities for the Highlands and Islands region. The draft emerging regional focused objectives are also presented in Table 10 detailed below.

**Table 10: National TPOs and the Regional Objectives<sup>71</sup>**

STPR2 OBJECTIVE	REGIONAL OBJECTIVES
A sustainable strategic transport system that contributes significantly to the Scottish Government’s net zero emissions target.	<ul style="list-style-type: none"> <li>▪ <i>Reduce the consumption of fossil fuels, capitalising on the renewables potential of the Highlands and Islands Economy, through the development of a low carbon transport system</i></li> <li>▪ <i>Increase the share of active travel for shorter, everyday journeys.</i></li> <li>▪ <i>Increase the share of public transport, and opportunities for car sharing, to provide viable alternatives to single occupancy car use, with a particular focus on travel to main population centres.</i></li> <li>▪ <i>Reduce emissions generated by the strategic transport systems, with a focus on utilising renewable energy to provide connectivity with the islands and rural communities.</i></li> </ul>
An inclusive strategic transport system that improves the affordability and accessibility of public transport.	<ul style="list-style-type: none"> <li>▪ <i>Increase public transport share by connecting sustainable modes of transport to facilitate integrated journeys, with a particular focus at key transport interchanges, including ferry terminals.</i></li> </ul>

<sup>71</sup> Objectives are being refined and are not final



	<ul style="list-style-type: none"> <li>▪ <i>Improve mobility and inclusion for rural residents, sustainably increasing the population.</i></li> <li>▪ <i>Reduce transport poverty, including lifeline services, by increasing travel choice for the Island and rural communities.</i></li> <li>▪ <i>Reduce the reliance on private car for access to key centres for healthcare, employment and education on both the Islands and the Scottish mainland.</i></li> </ul>
<p>A cohesive strategic transport system that enhances communities as places, supporting health and wellbeing.</p>	<ul style="list-style-type: none"> <li>▪ <i>Reduce the adverse impacts of the strategic transport system on communities by embedding the place-principle in the changes to the strategic transport system</i></li> <li>▪ <i>Increase the share of active travel for shorter, everyday journeys.</i></li> <li>▪ <i>Reduce demand for unsustainable travel arising from nationally significant growth areas, taking cognisance of Local Development Plans and the emerging NPF4.</i></li> </ul>
<p>An integrated strategic transport system that contributes towards sustainable inclusive growth in Scotland.</p>	<ul style="list-style-type: none"> <li>▪ <i>Increase sustainable access to labour markets and key centres for employment, education and training recognising the remote nature of large parts of the region.</i></li> <li>▪ <i>Increase competitive transport access to key domestic and international markets, by reducing costs and improving journey time reliability for business and commercial transport, with an additional focus on facilitating a viable working day in the Central Belt, by public transport.</i></li> <li>▪ <i>Increase resilience of accesses to key domestic and international markets to encourage people to live, study, visit and invest in the Highlands and Islands.</i></li> <li>▪ <i>Make better use of existing transport infrastructure through the adoption of beneficial transport innovations.</i></li> <li>▪ <i>Increase the mode share of freight by sustainable modes.</i></li> </ul>
<p>A reliable and resilient strategic transport system that is safe and secure for users.</p>	<ul style="list-style-type: none"> <li>▪ <i>Improve the resilience from disruption of the region’s trunk road, rail, strategic ferry and aviation infrastructure.</i></li> <li>▪ <i>Reduce transport related casualties in line with reduction targets.</i></li> <li>▪ <i>Improve resilience through climate change adaptation within the management and maintenance of trunk road, rail and ferry infrastructure.</i></li> </ul>





Table 11 demonstrates the alignment of the objectives/outcomes developed for the Highlands and Islands with the identified problems and opportunity themes in the region.



**Table 11 Mapping of Problem and Opportunity Themes to Transport Planning Objectives**

National Objective/Outcome	Regional Sub-Objective/Outcome	Problem Themes						Opportunity Themes		
		Connectivity	Transport Poverty	Capacity Constraints	Journey Times	Resilience	Public Transport Frequency and Integration	Dependence on Private Car	Economic Growth	Availability of Renewable Energy
A sustainable strategic transport system that contributes significantly to the Scottish Government's net zero emissions target	Reduce the consumption of fossil fuels, capitalising on the renewables potential of the Highlands and Islands Economy, through the development of a low carbon transport system									
	Increase the share of active travel for shorter, everyday journeys.									
	Increase the share of public transport, and opportunities for car sharing, to provide viable alternatives to single occupancy car use, with a particular focus on travel to main population centres									
	Reduce emissions generated by the strategic transport systems, with a focus on utilising green energy to provide connectivity with the islands and rural communities.									
An inclusive strategic transport system that improves the affordability and accessibility of public transport	Increase public transport share by connecting sustainable modes of transport to facilitate integrated journeys, with a particular focus at key transport interchanges, including ferry terminals.									
	Improve mobility and inclusion for rural residents, sustainably increasing the population.									
	Reduce transport poverty, including lifeline services for the Island and rural communities									
	Reduce the reliance on private car for access to key centres for healthcare, employment and education.									
A cohesive strategic transport system that enhances communities as places, supporting health and wellbeing	Reduce the adverse impacts of the strategic transport system on communities by embedding the place-principle in the changes to the strategic transport system									
	Increase the share of active travel to improve health and well-being.									
	Reduce demand for unsustainable travel arising from nationally significant growth areas, taking cognisance of Local Development Plans and the emerging NPF4									
An integrated strategic transport system that contributes towards sustainable inclusive growth in Scotland	Increase sustainable access to labour markets and key centres for employment, education and training recognising the remote nature of large parts of the.									
	Increase competitive transport access to key domestic and international markets, by reducing costs and improving journey time reliability for business and commercial transport, with an additional focus on facilitating a viable working day in the Central Belt, by public transport									
	Increase resilience of accesses to key domestic and international markets to encourage people to live, study, visit and invest in the Highlands and Islands.									
	Make better use of existing transport infrastructure through the adoption of beneficial transport innovations.									
	Increase the mode share of freight by sustainable modes									
A reliable and resilient strategic transport system that is safe and secure for users	Improve the resilience from disruption of the region's trunk road, rail, strategic ferry and aviation infrastructure.									
	Reduce transport related casualties in line with reduction targets.									
	Improve resilience through climate change adaptation within the management and maintenance of trunk road, rail and ferry infrastructure.									



## 5. Approach to Option Generation and Sifting

### 5.1. Strategic Options

As set out earlier, STPR2 specifically focusses on Scotland's key strategic transport assets. In the context of STPR2, a strategic transport project is defined as any transport project that materially contributes to Scottish Government/Transport Scotland policies and strategies.

Specifically, this will include:

- any transport project that plays a significant part in supporting the four NTS2 priorities and related outcomes;
- projects or groups of projects related to transport networks owned, operated and funded directly by Transport Scotland;
- passenger and freight access to ports and airports of national significance, and
- the inter-urban bus and active travel networks and principal corridors within urban areas.

Within the overall definition above options considered within the STPR2 may include:

- Demand management measures, including use of technology and innovation, behavioural change and regulatory control;
- Strategic maintenance and safety measures;
- Strategic measures to increase travel by active travel modes;
- Public transport improvements, including interchanges, road space allocation, technology and ticketing;
- Links to/from areas of economic activity of national significance;
- Appropriate policy and financial instruments (that are within the responsibility of Scottish Government);
- Targeted infrastructure improvements on the transport networks owned, operated and funded directly by Transport Scotland;
- Changes to the operation of air and ferry terminals and services;
- Infrastructure measures at ports and harbours of national significance; and
- Improved access to airports of national significance.

A strategic transport project will not include:

- Changes in vehicle regulation and taxation;
- Planning led initiatives (e.g. changes to the statutory planning process);
- Changes to the governance framework within which transport delivery and operation takes place;
- Concessionary fares; or
- Routine and cyclic maintenance measures.



## 5.2. Approach

The approach to the generation of interventions for STPR2, including the interventions identified at the regional level for the Highlands and Islands, is summarised in Figure 36 below. .

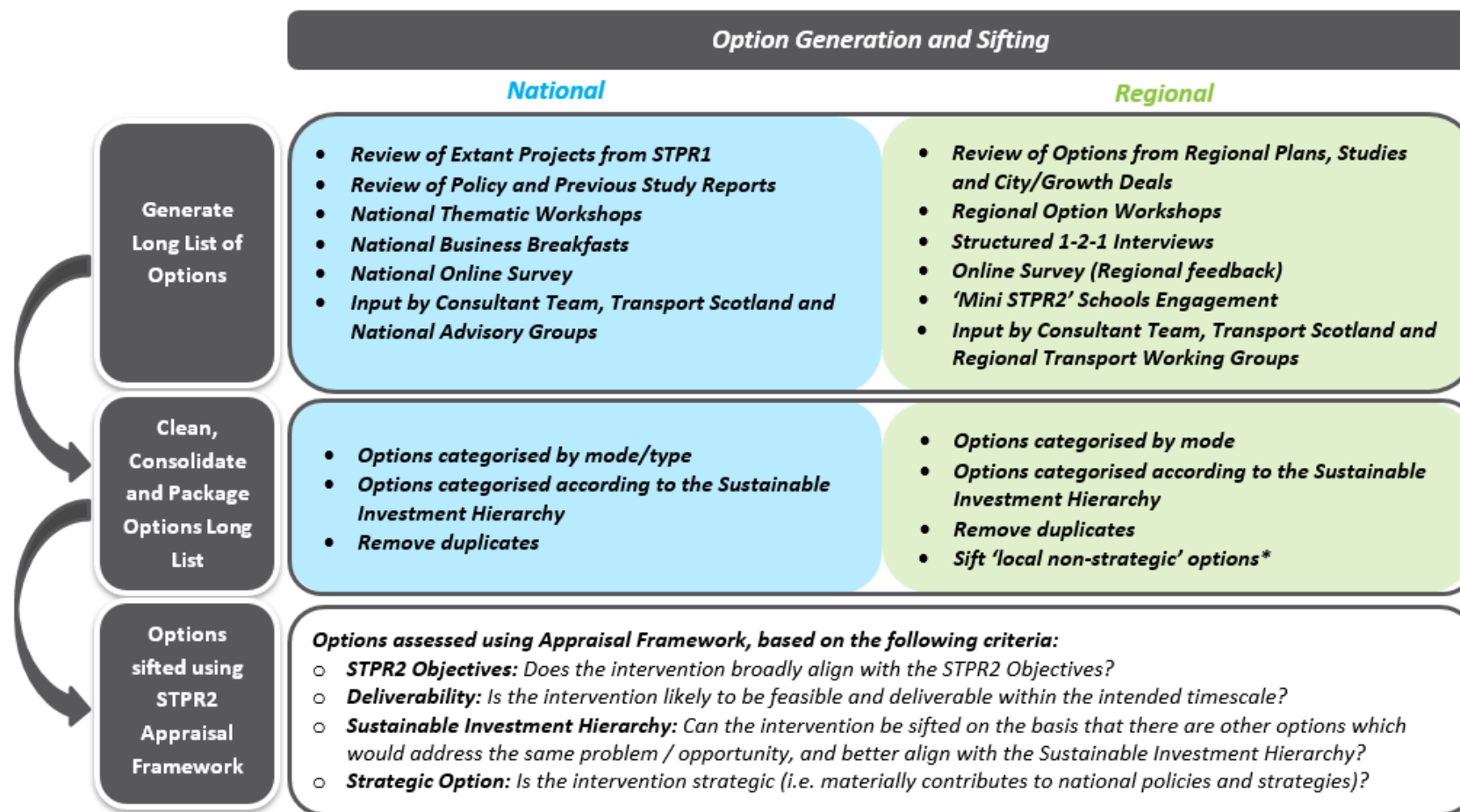


Figure 36 Approach to Option Generation and Sifting<sup>72</sup>

\* Local options which could become strategic as part of a national programme of interventions, or could be packaged to become strategic would be taken forward. Other, local options specific to an issue in a region would be sifted from STPR2 and the evidence shared with the respective regional/local transport organisation for further consideration.



As noted, a long list of interventions for consideration through STPR2 have been generated from a range of national and regional option generation exercises. At the Highlands and Islands level, work has included intervention workshops held across the region in November and December 2019, the findings from the online survey as well as a review of interventions identified from recent previous studies completed in the region.

The process of option generation for STPR2 is being informed and structured around the sustainable investment hierarchy which is outlined in the NTS2 and shown in Figure 37.



**Figure 37: The Sustainable Investment Hierarchy**

### 5.3. Next Steps

Going forward, the long list of options will be developed and sifted in line with the approach set out in Section 5.2, with the resulting short list of interventions appraised in line with the STAG-based Appraisal Framework developed for STPR2.

#### Commenting on this Report

As part of our ongoing engagement, comments on this draft Case for Change Report can be submitted using a comments form that can be accessed [here](#). The closing date for comments is midnight on Wednesday 8 April 2020.



## APPENDICES

### Appendix A: Figures

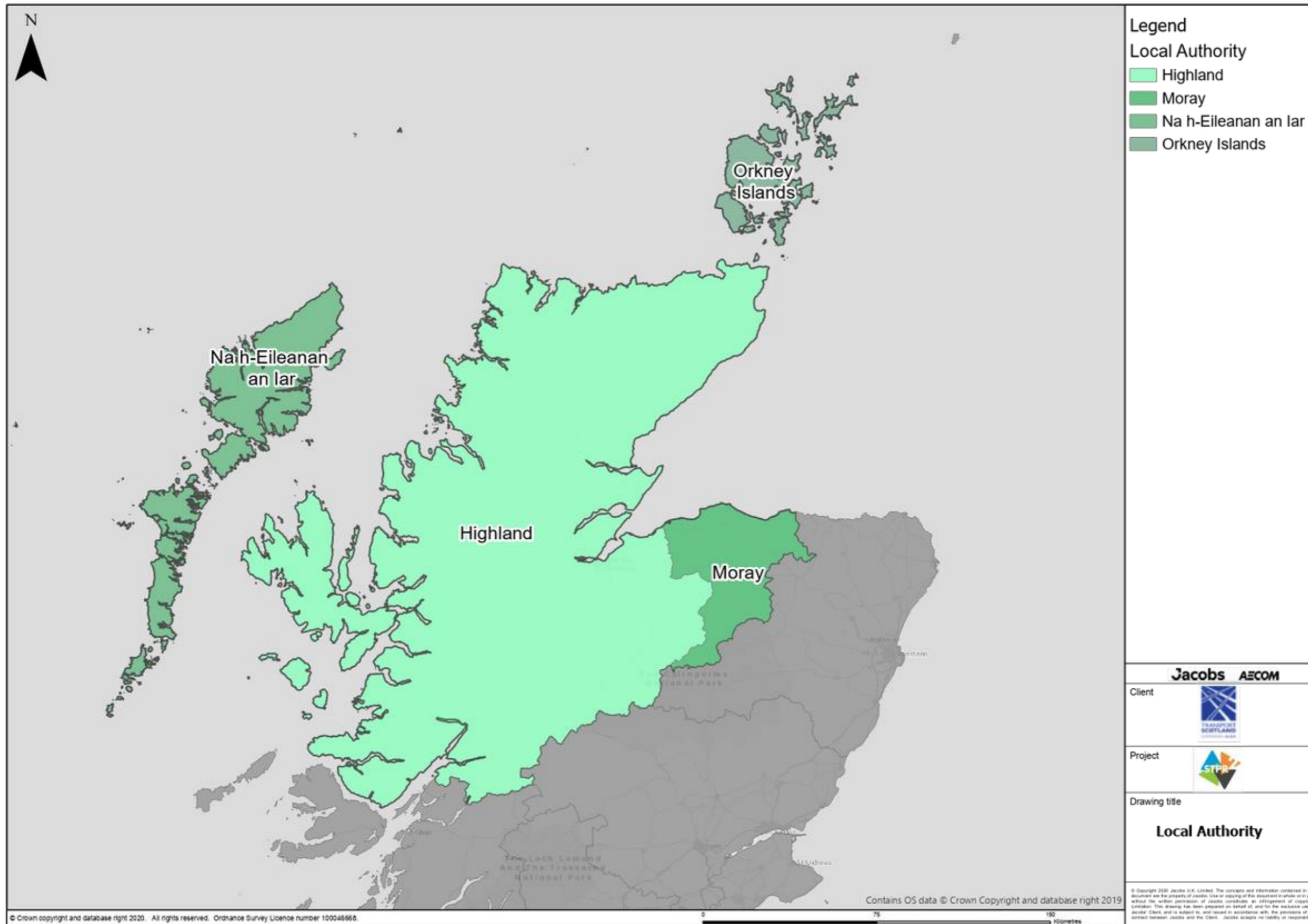


Figure A 1: Highlands and Islands Study Area (Click image to go back to main report)

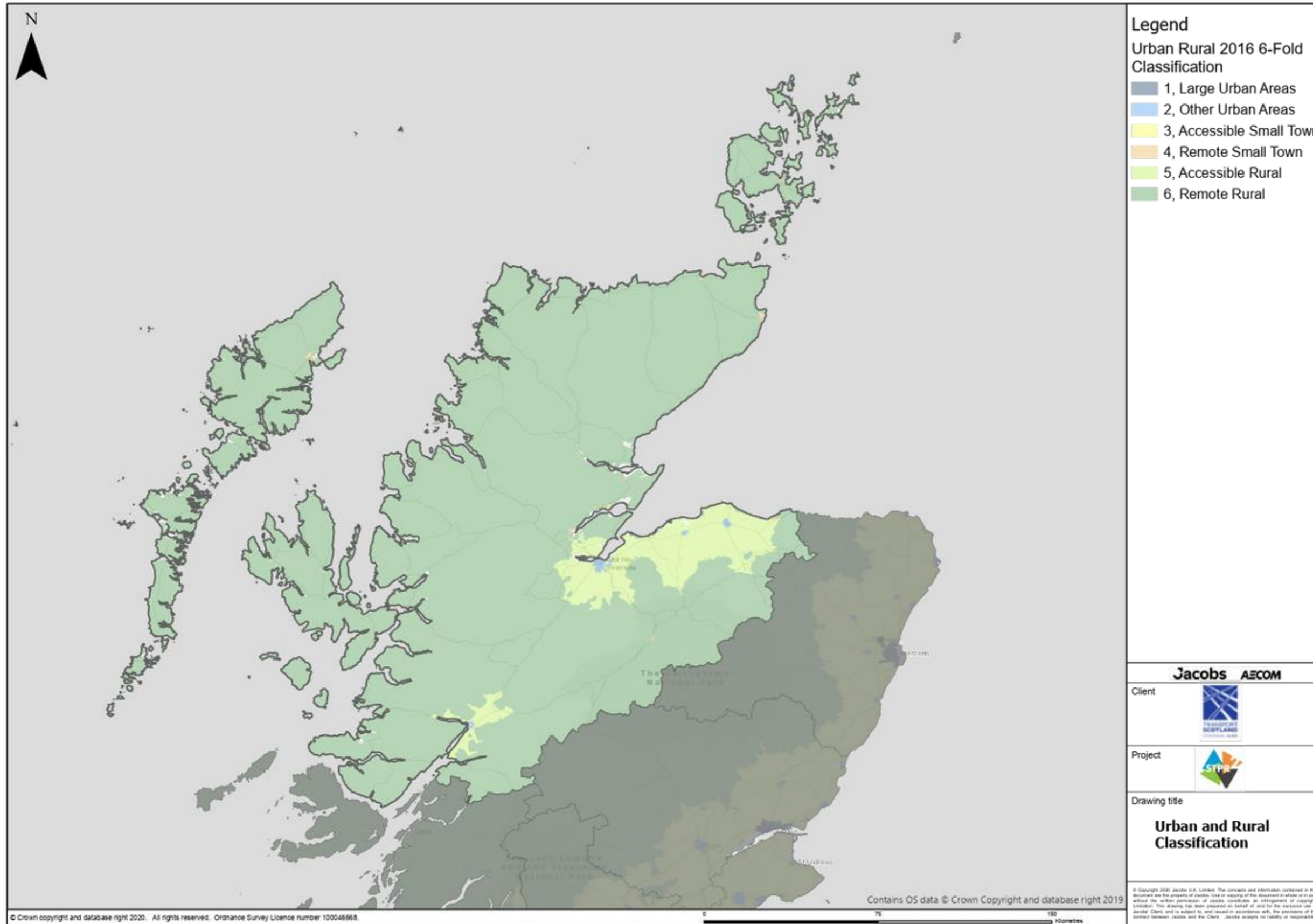
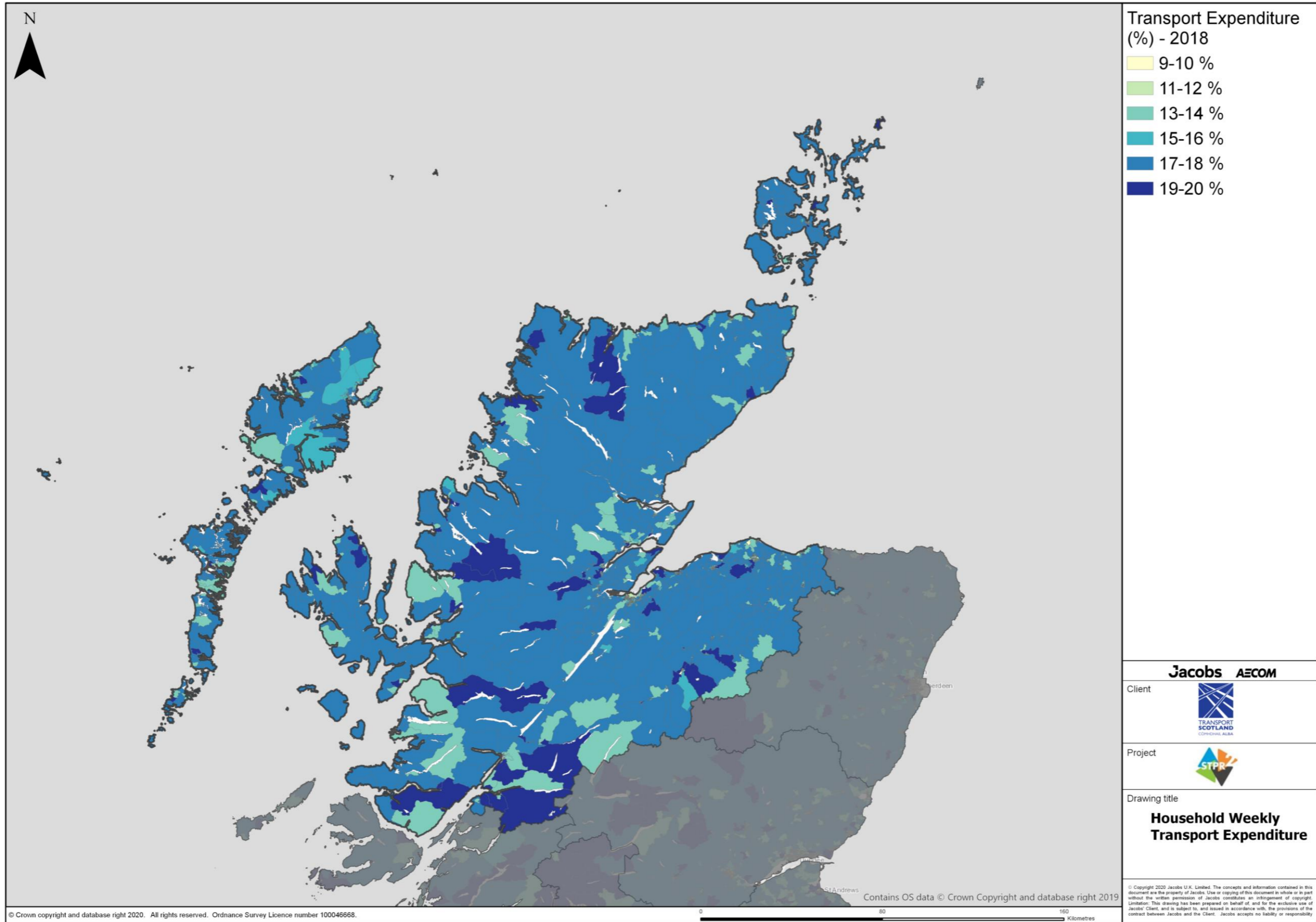


Figure A 2: Urban-Rural 2016 Scottish Government 6-Fold Classification (Click image to go back to main report)





<b>Jacobs AECOM</b>	
Client	
Project	
Drawing title	<b>Household Weekly Transport Expenditure</b>

Figure A 3: Transport Expenditure (%) relative to Household Budgets (Click image to go back to main report [figure 18])



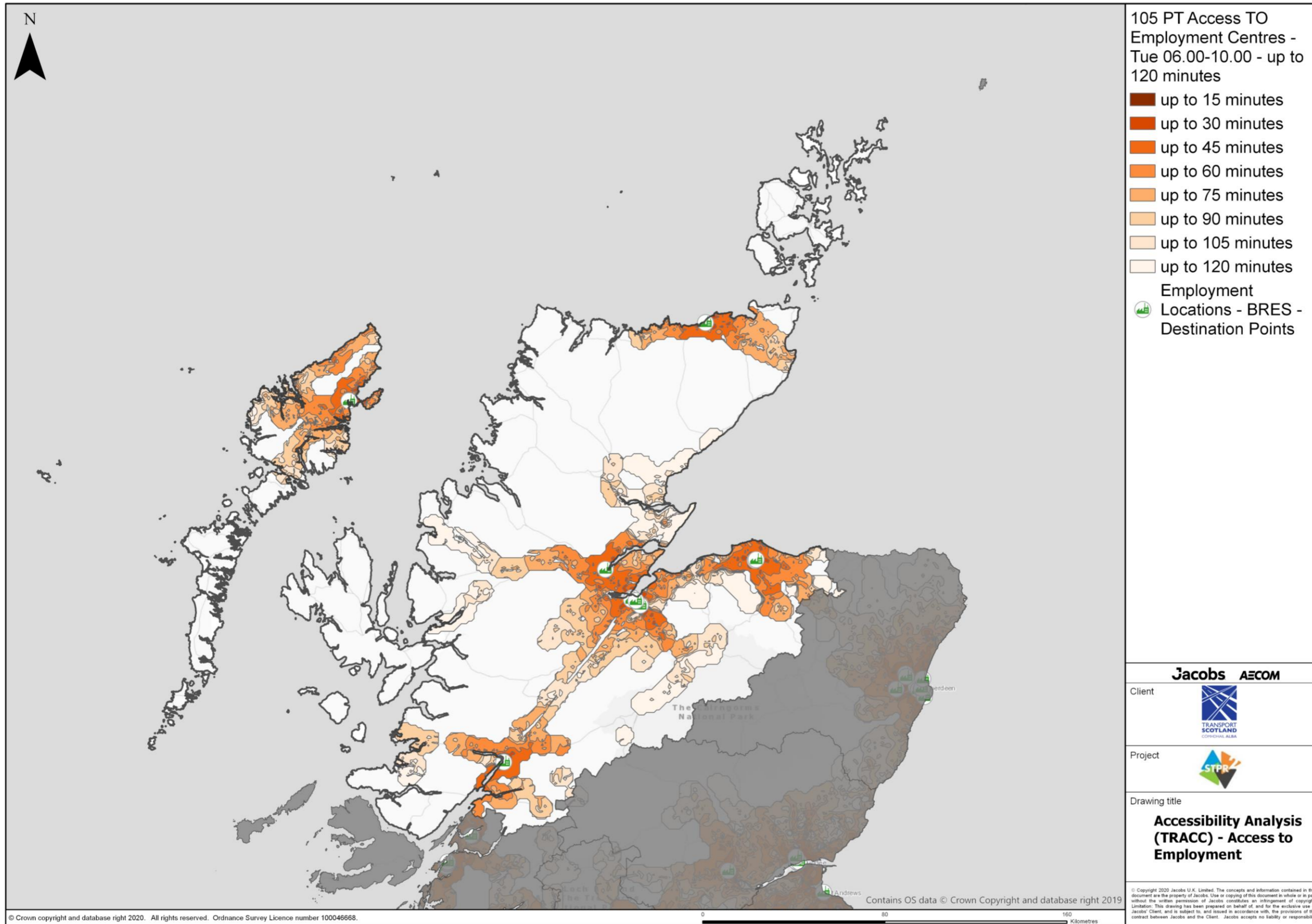


Figure A 4: Access to Key Employment Centres by Public Transport (Click image to go back to main report)



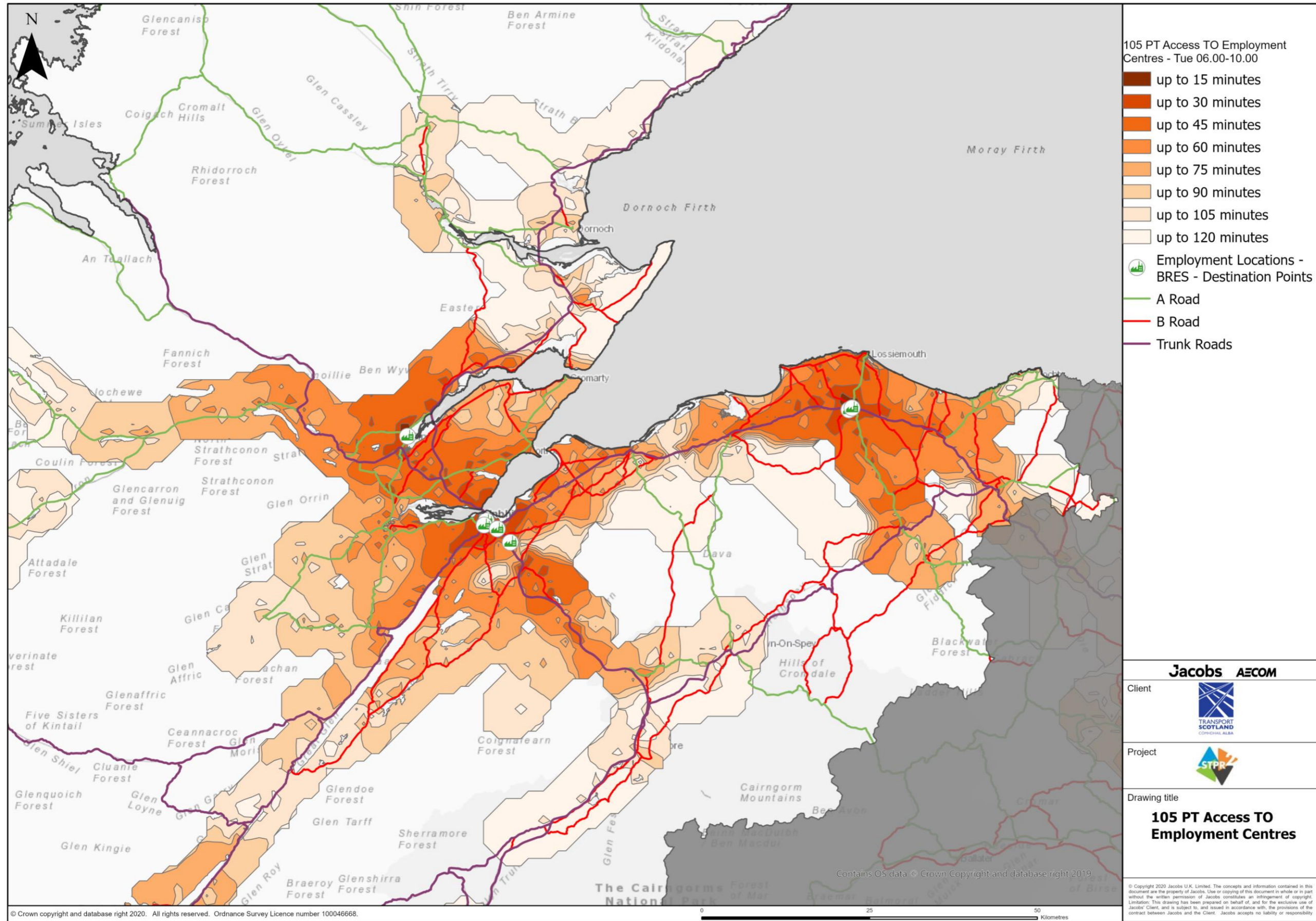


Figure A 5: Access to Employment Central Highland and Moray (Click image to go back to main report)



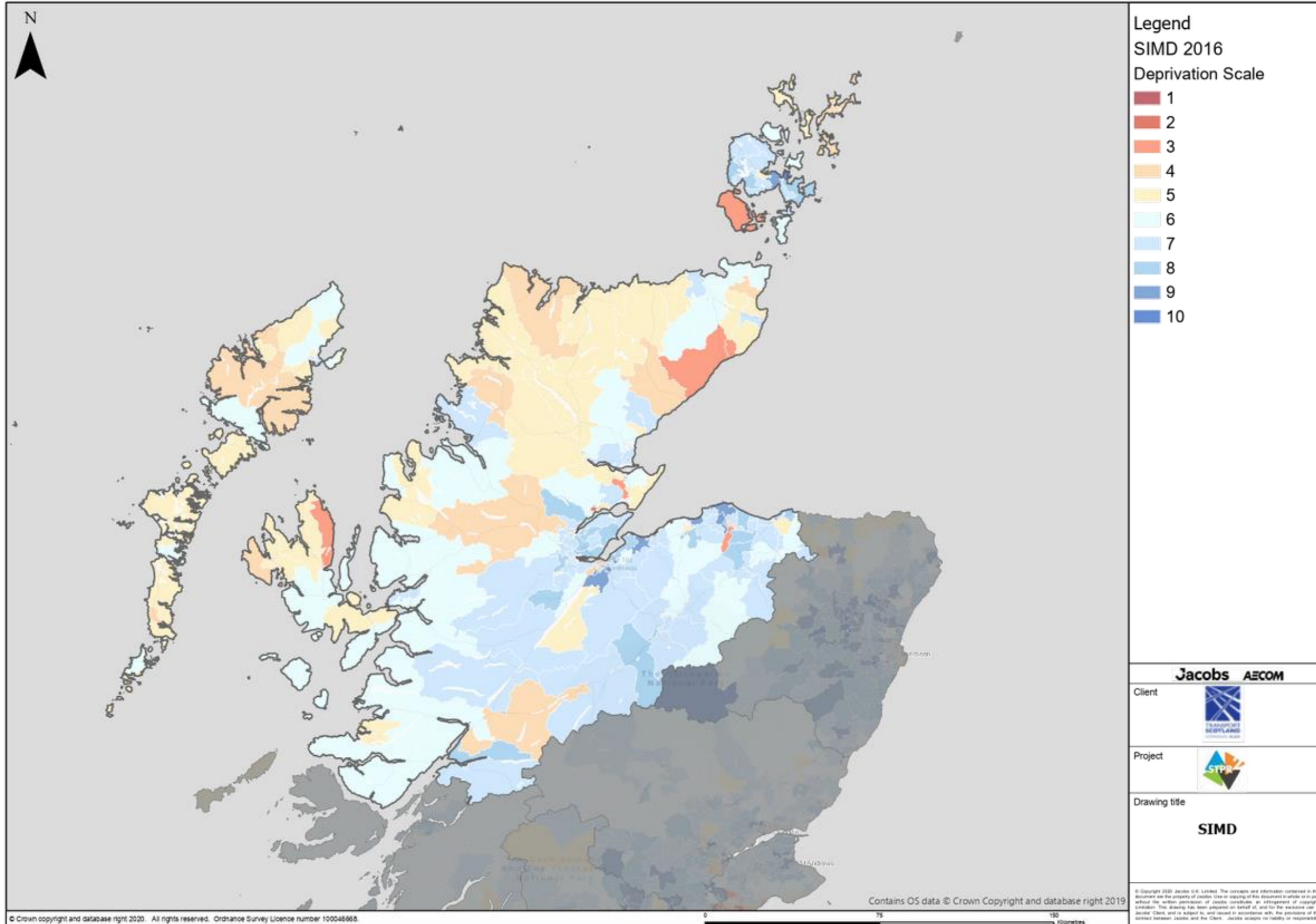


Figure A 6: Highlands and Islands Region - Scottish Index of Multiple Deprivation (Click image to go back to main report)

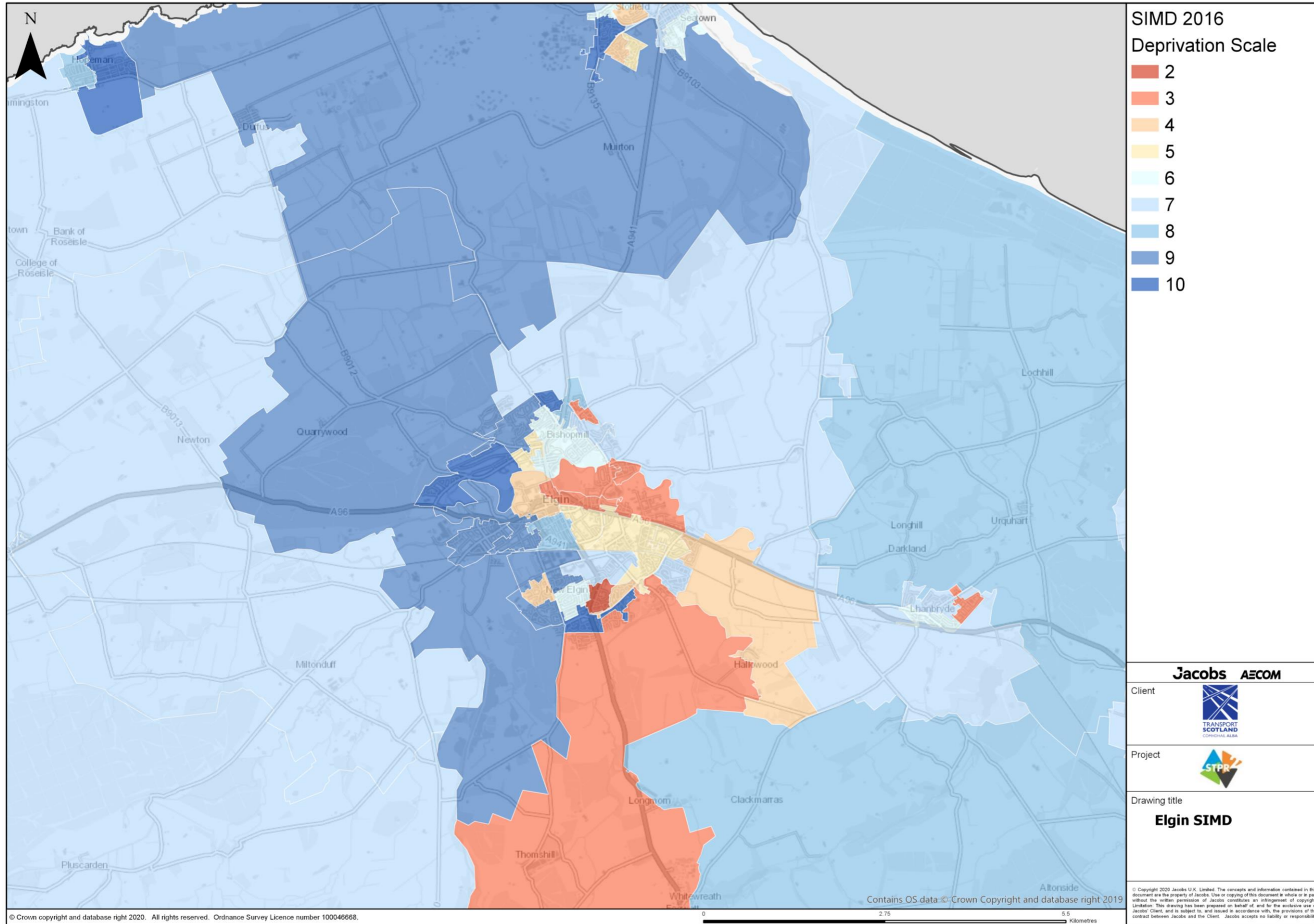


Figure A 7: Elgin Overall SIMD (Click image to go back to main report)



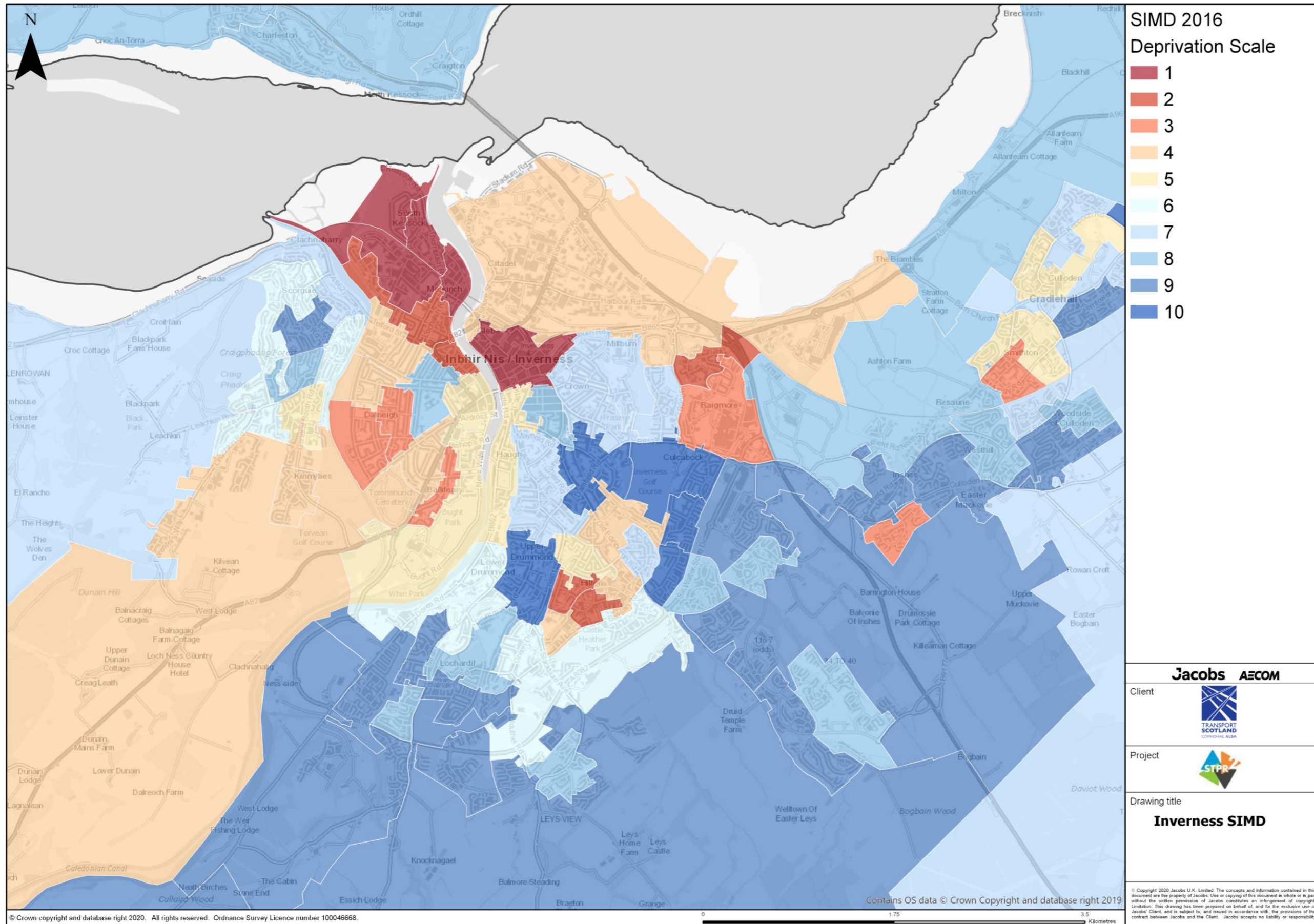


Figure A 8: Inverness Overall SIMD (Click image to go back to main report)



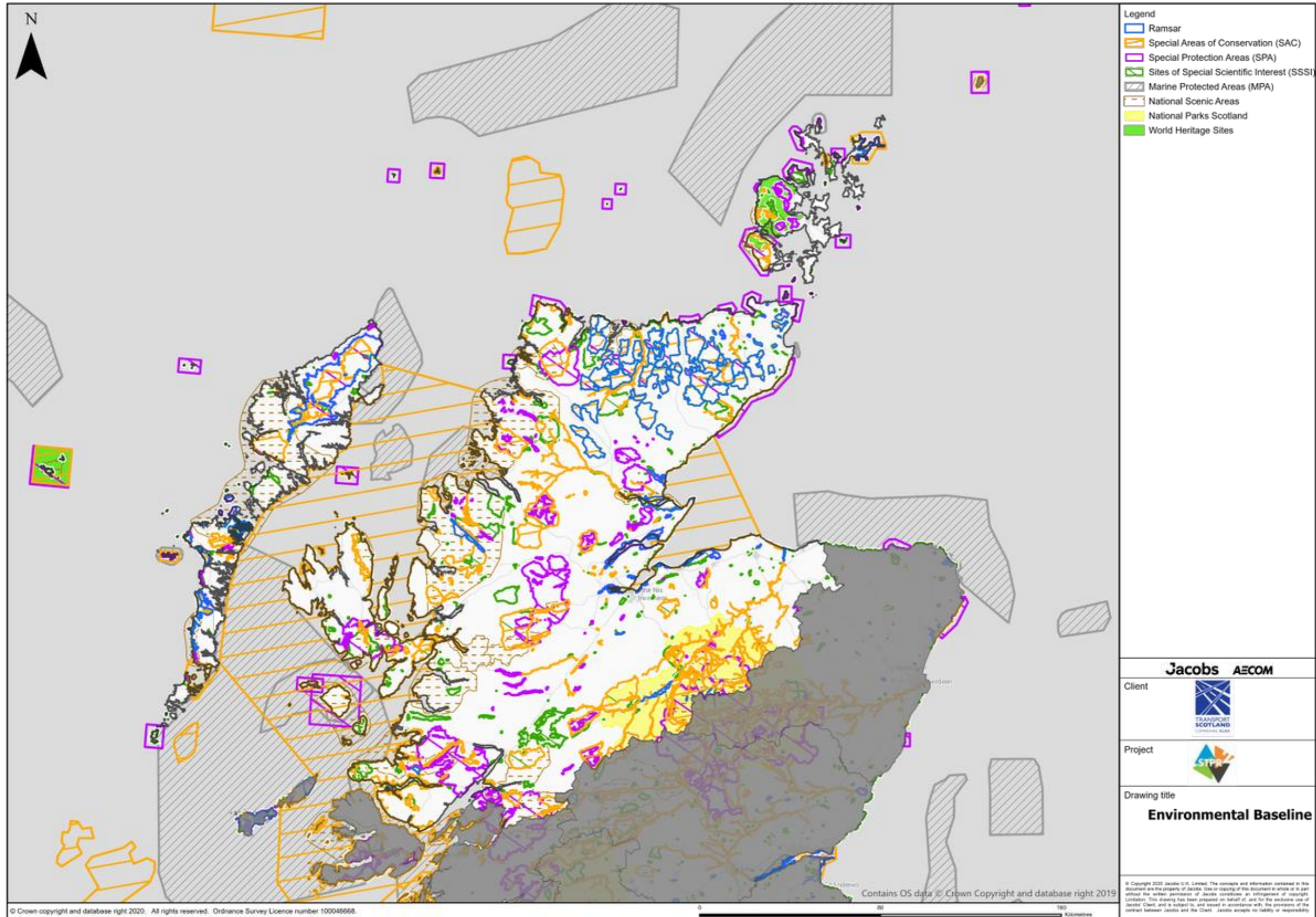


Figure A 9: Environmental Baseline (Click image to go back to main report)



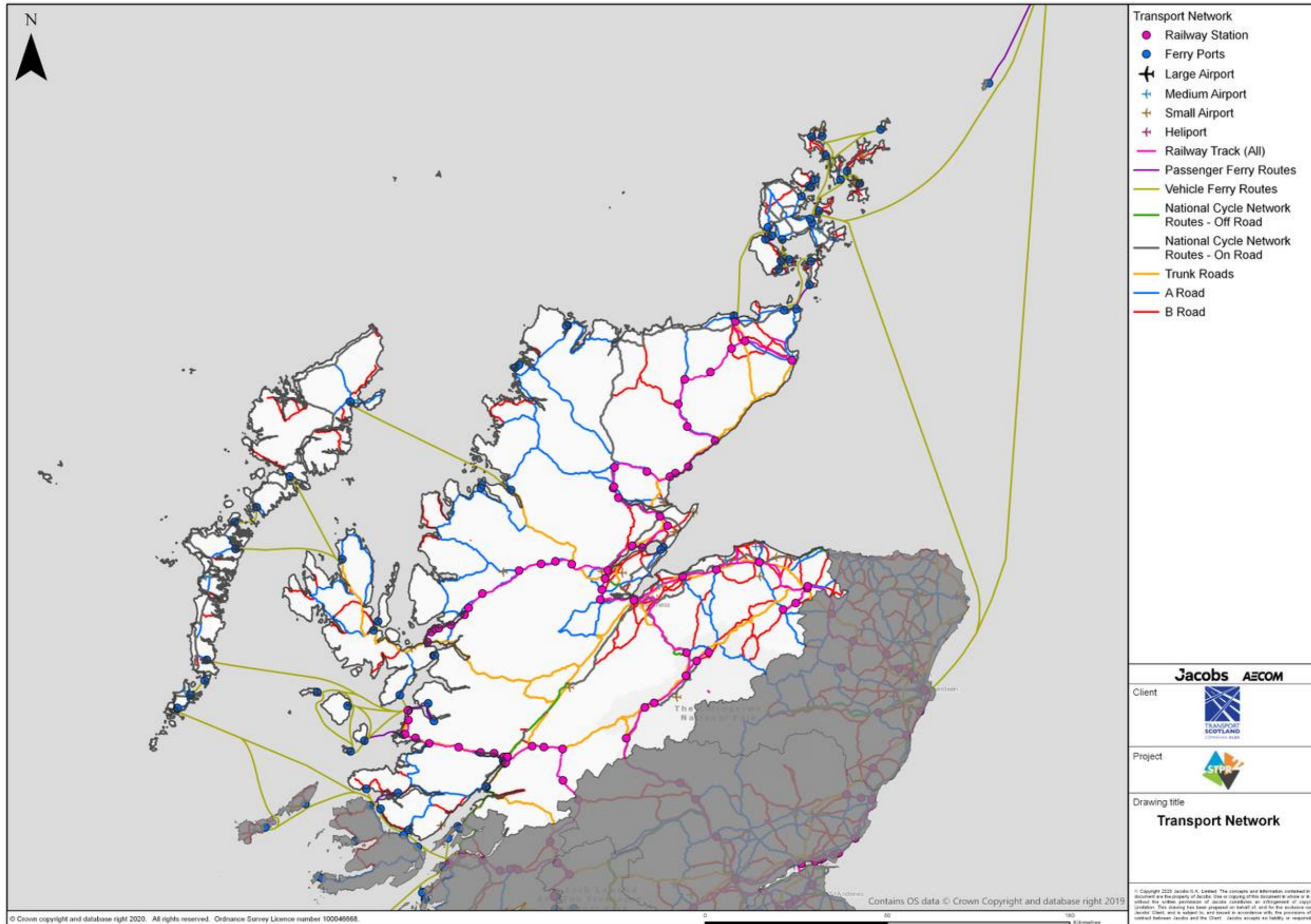


Figure A 10: Highlands and Islands Transport Network (Click image to go back to main report)

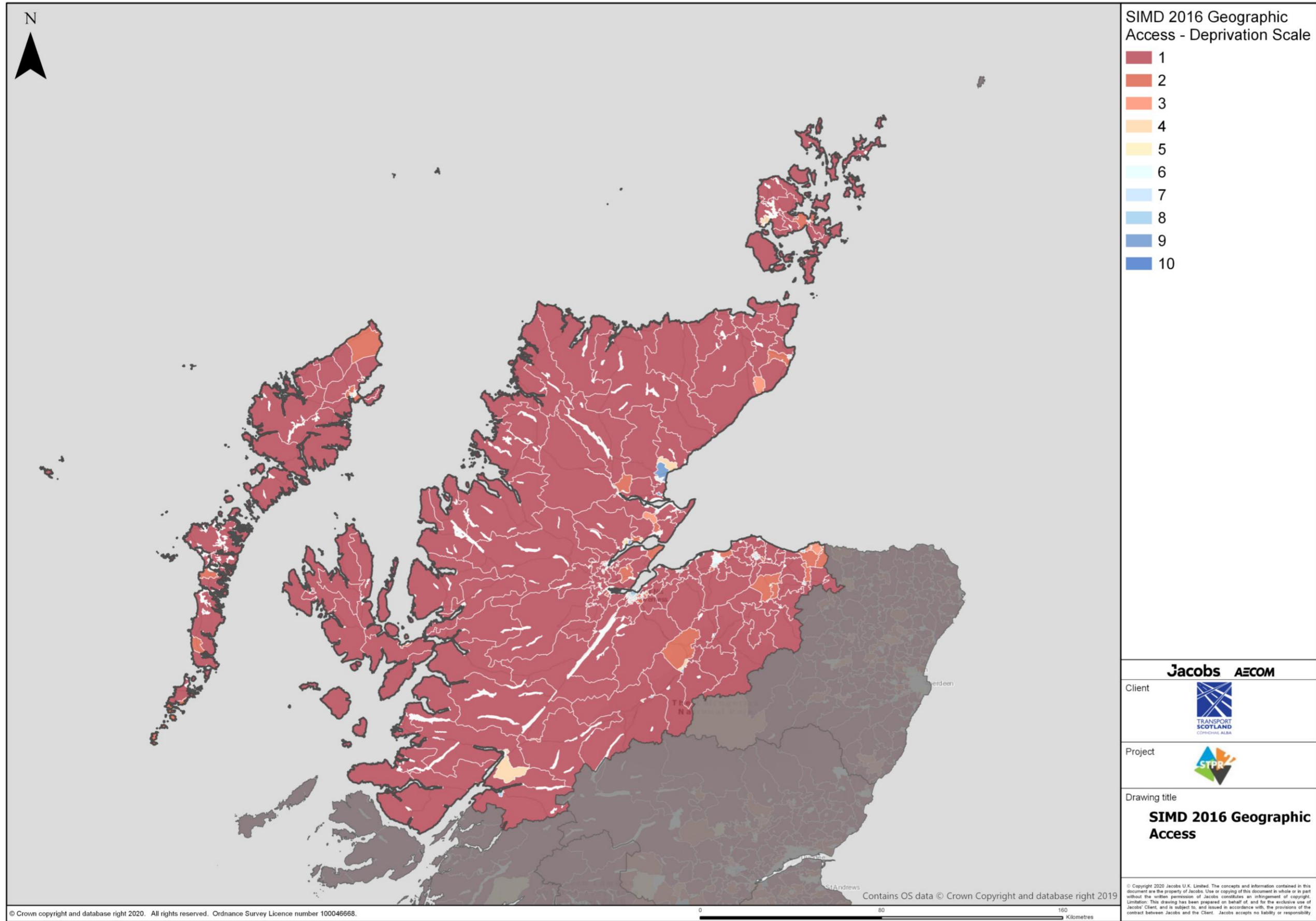


Figure A 11: SIMD - Access Deprivation (Click image to go back to main report)



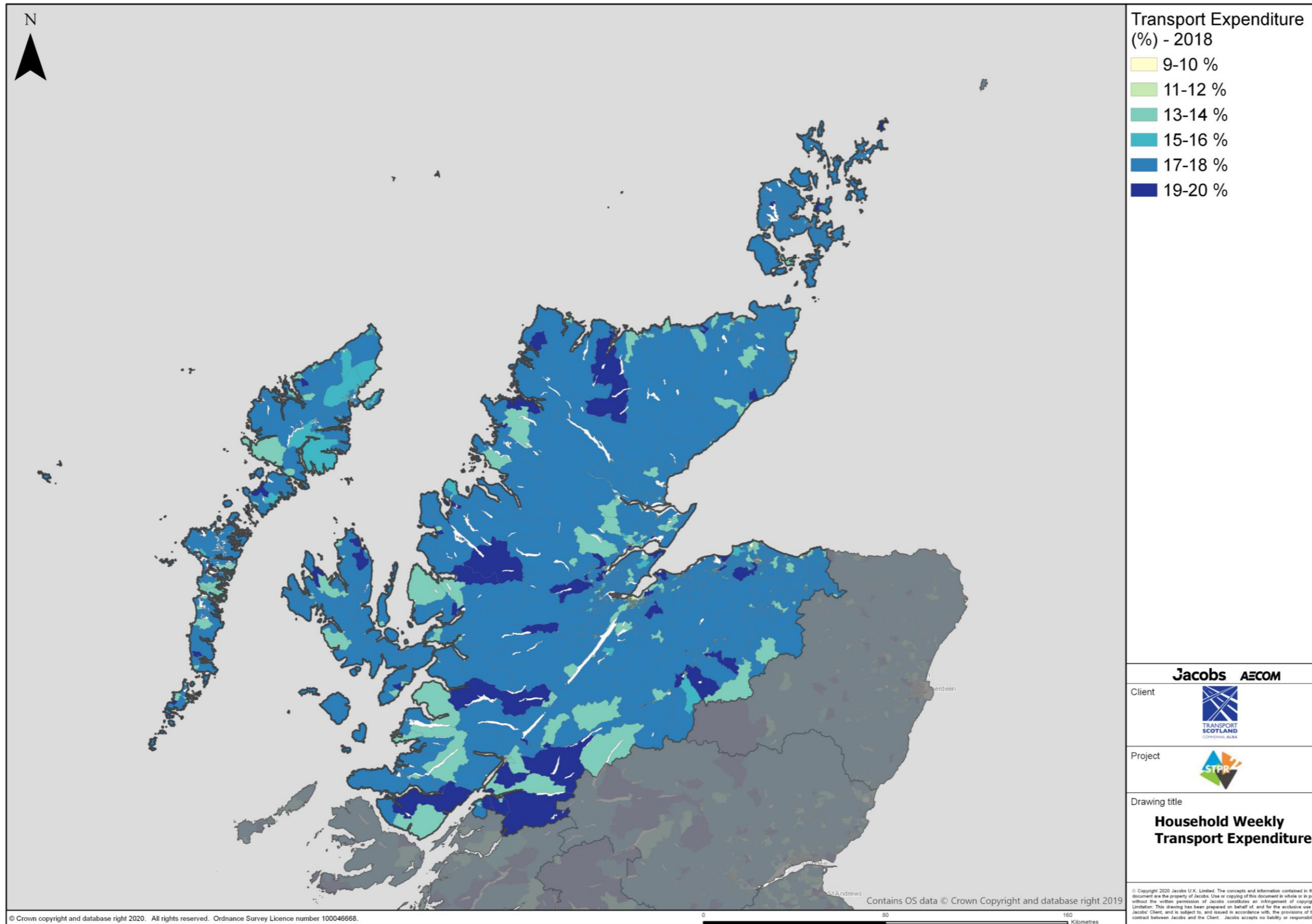


Figure A 12: Transport Expenditure (%) relative to Household Budgets (Click image to go back to main report [figure 18])

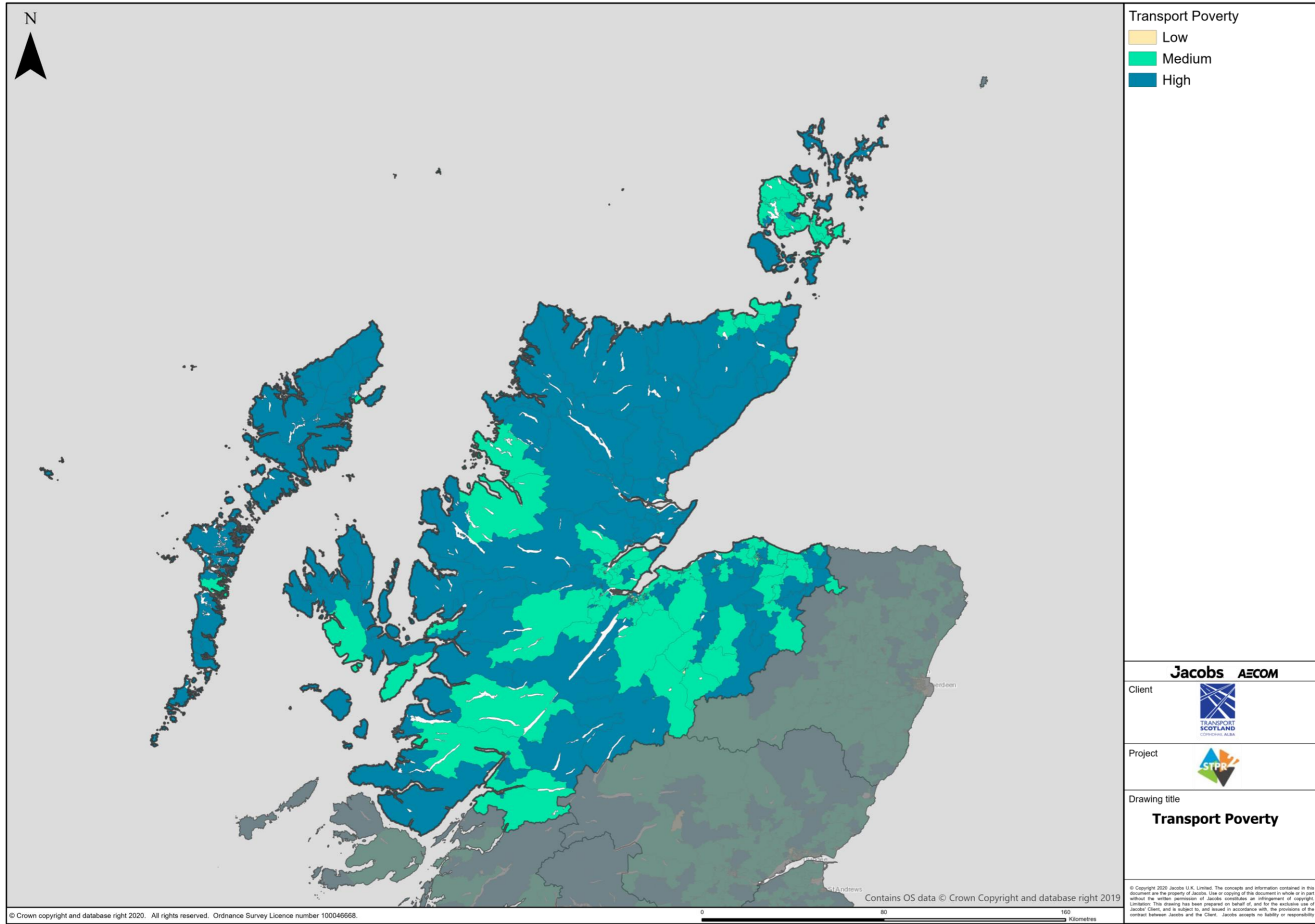


Figure A 13 Transport Poverty in the Highland and Islands Region (Click image to go back to main report)



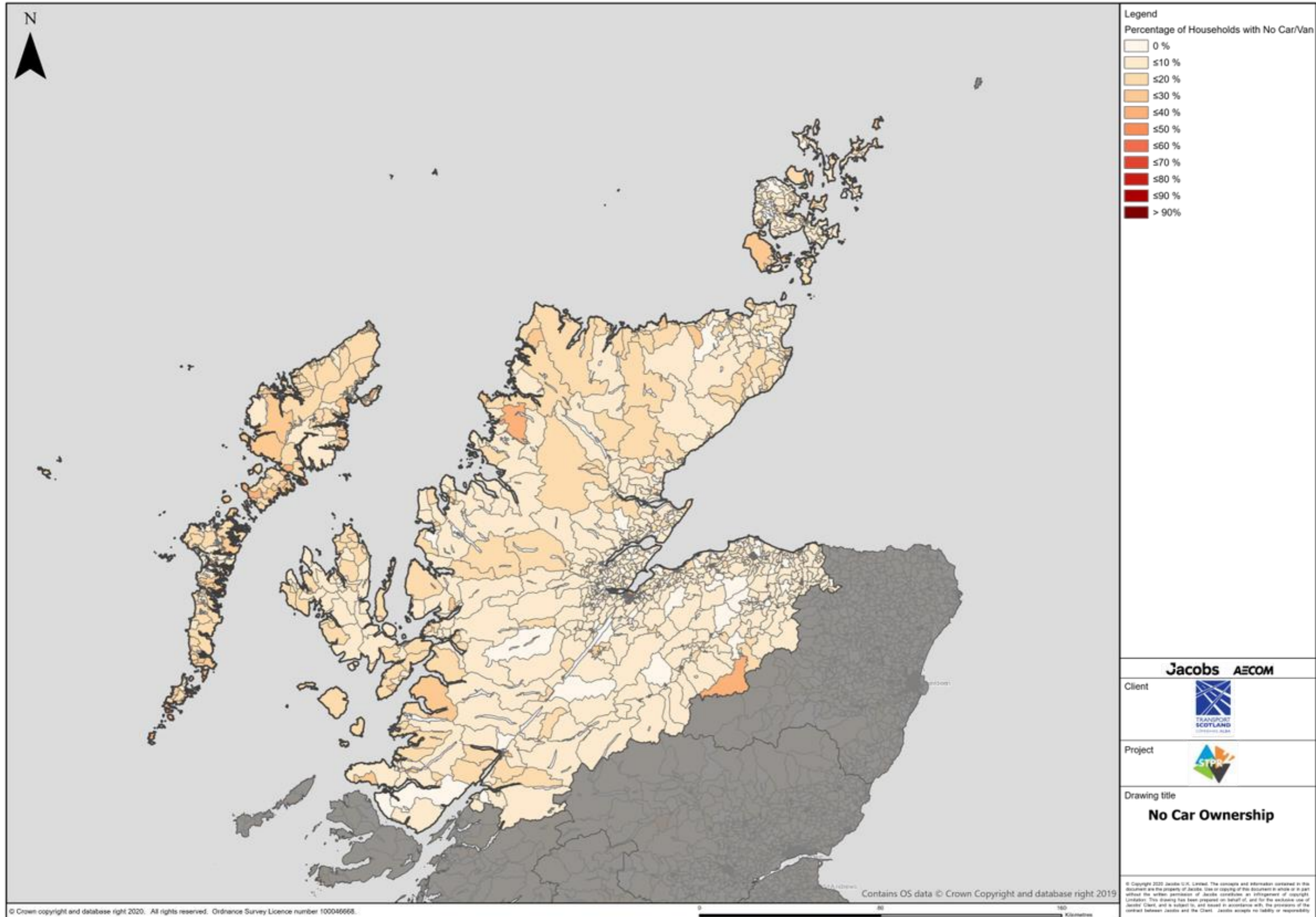


Figure A 14: No Car Ownership in the Highlands and Islands (Click image to go back to main report)

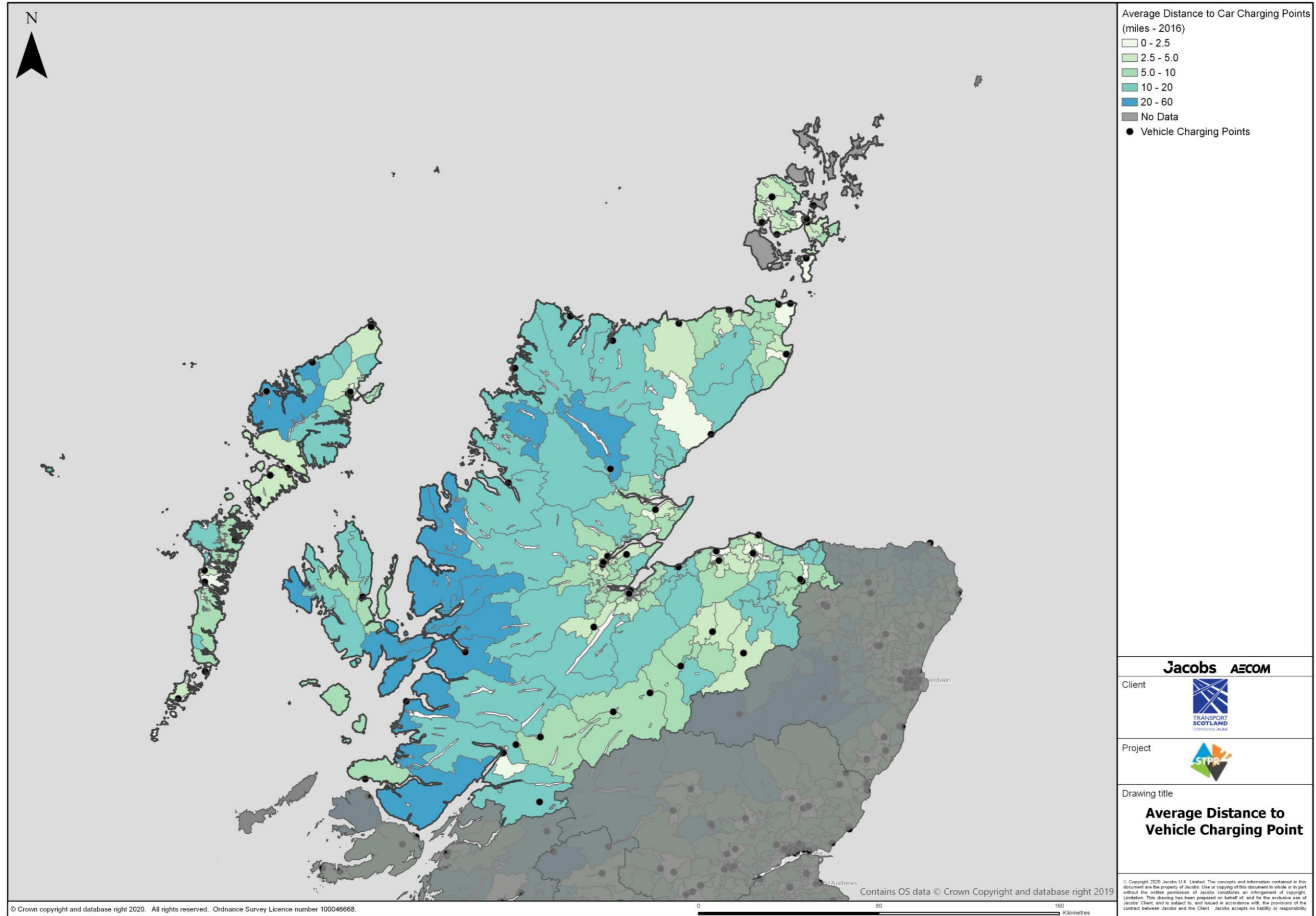


Figure A 15: Average Distance to Charging Points





## Appendix B: Policy Review List

Theme	Title	Author	Year
Development	The National Plan for Scotland's Islands	The Scottish Government	2019
Development	West Highland and Islands Local Development Plan Transport Background paper	The Highland Council	2016
Development	Highland Wide Local Development Plan	The Highland Council	2012
Development	West Highland and Islands Local Development Plan	The Highland Council	2016
Development	Caithness and Sutherland Local Development Plan	The Highland Council	2018
Development	Inner Moray Firth Local Development Plan	The Highland Council	2015
Development	Cairngorms National Park Local Development Proposed Plan 2020	Cairngorms National Park Authority	2019
Development	Orkney Local Development Plan	Orkney Islands Council	2017
Development	Outer Hebrides Local Development Plan	Comhairle nan Eilean Siar	2018
Development	Moray Local Development Plan 2015	Moray Council	2015
Development	Infrastructure Investment Plan	The Scottish Government	2015
Development	National Planning Framework 3	The Scottish Government	2014
Economy	Inverness & Highland City Region Deal – Heads of Terms Agreement	Th Highland Council, Scottish Government, UK Government	2016
Economy	An Action Plan for Economic Development in Highland	Highland Economic Forum	2012
Economy	Cairngorms National Park Economic Strategy 2015-2018	Cairngorms National Park Authority	2015
Economy	Scotland's Economic Strategy	The Scottish Government	2015
Economy	Low Carbon Economic Strategy	The Scottish Government	2010
Energy	The Future of Energy in Scotland: Scottish Energy Strategy	The Scottish Government	2017
Environment	The Highland Council Carbon Management Plan	The Highland Council	2013
Other	HITRANS Main Issues Report	HITRANS	2016
Other	HIE Operating Plan	Highlands and Islands Enterprise	2018
Other	The Highland Outcome Improvement Plan	Highland Community Planning Partnership	2017
Other	Highland Council Corporate Plan	The Highland Council	2019
Transport	HITRANS Regional Transport Strategy Draft	HITRANS	2017



Transport	Active Highland Strategy	Highland Community Planning Partnership	2017
Transport	The Highland Council Local Transport Strategy	The Highland Council	2010
Transport	Orkney Islands Council Local Transport Strategy	Orkney Islands Council	2007
Transport	Moray Local Transport Strategy Part 1 and Part 2	Moray Council, 2011	2015
Transport	Strategic Transport Projects Review	Transport Scotland	2009
Transport	National Transport Strategy Refresh	Transport Scotland	2016
Transport	Scotland's Railways	Transport Scotland	2006
Transport	Scotland's Rail Freight Strategy	Transport Scotland	2016
Transport	Scottish Trunk Road Network Asset Management Strategy	Transport Scotland	2018
Transport	Scottish Ferry Services Ferries Plan 2013 - 2022	Transport Scotland	2013
Transport	Strategic Road Safety Plan	Transport Scotland	2016
Transport	Network Rail Scotland Route Study	Network Rail	2016
Transport	Cycling Action Plan for Scotland	Transport Scotland	2017
Transport	Let's Get Scotland Walking	The Scottish Government	2014



## Appendix C: Summary of Stakeholder Engagement Activities





Engagement Type	Date	Venue	Purpose and Details	No. of Attendees
Problems & Opportunities Workshop	Thursday 27 <sup>th</sup> June 2019	Kirkwall & St Ola Community Centre, Kirkwall	Workshop with stakeholders including representatives from transportation, education, health and environmental sectors, in addition to local authority officers, to identify transport-related problems and opportunities in the region.	21
	Wednesday 5 <sup>th</sup> June 2019	Elgin Sports and Community Centre, Elgin		12
	Monday 17 <sup>th</sup> June 2019	Inverness Town House, Inverness		16
	Wednesday 19 <sup>th</sup> June 2019	Pentland Hotel, Thurso		14
	Monday 24 <sup>th</sup> June 2019	Caladh Inn, Stornoway		11
	Thursday 27 <sup>th</sup> June 2019	Nevis Centre, Fort William		16
Structured Interviews	June – October 2019	-	Interviews with key stakeholders, including Senior Officers within the local authorities and Business representatives, to identify transport-related problems and opportunities and potential options for the region.	6
Interventions Workshop	Tuesday 26 <sup>th</sup> November 2019	Caladh Inn, Stornoway	Workshop with stakeholders including representatives from transportation, education, health and environmental sectors, in addition to local authority officers, to identify potential interventions to address problems and opportunities previously identified.	6
	Thursday 5 <sup>th</sup> December 2019	Moray Council Building, Elgin		3
	Tuesday 10 <sup>th</sup> December 2019	Nevis Centre, Fort William		14
	Monday 25 <sup>th</sup> November 2019	Kirkwall & St Ola Community Centre, Kirkwall		11



	Wednesday 4 <sup>th</sup> December 2019	Best Western Inverness Palace Hotel & Spa, Inverness		17
Elected Members Briefing / Workshop	Wednesday 15 <sup>th</sup> January 2020	Royal Highland Hotel, Inverness	Elected Members from across the region attended a briefing session on emerging findings from STPR2 and to provide feedback on potential interventions that should be considered as the study moves forward.	5
	Thursday 16 <sup>th</sup> January 2020	Kirkwall & St Ola Community Centre, Kirkwall		14
	Tuesday 4 <sup>th</sup> February	Caladh Inn, Stornoway		9
Online Survey	Monday 2 <sup>nd</sup> December 2019 – Friday 10 <sup>th</sup> January 2020	Online	Online survey promoted to members of the public and organisations to validate emerging problems from the STPR2 process and to provide feedback on potential interventions to improve the strategic transport network, across all modes, in the future.	515 responses

