



**GREATER  
MANCHESTER  
INDEPENDENT  
PROSPERITY  
REVIEW**

# **EVIDENCE UPDATE: TRANSPORT**

A research report for the  
Greater Manchester Prosperity Review: Evidence Update  
October 2022

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**Authors:** Andrew Walmsley, Senior Transport Strategy Officer (Strategic Planning), TfGM. Elsie Blundell, Transport Strategy Officer (Strategic Planning), TfGM. Rod Fawcett, GM Delivery Lead (Policy and Research), TfGM.

TfGM is home to a team of skilled professionals, who undertake transport data analysis and research to support the development, appraisal and evaluation of transport policies, strategies and scheme developments throughout Greater Manchester on behalf of Greater Manchester's District Councils, Transport for Greater Manchester and external clients.

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[The Greater Manchester Independent Prosperity Review](#) was commissioned by a panel of distinguished experts, chaired by Professor Diane Coyle, to provide a detailed and rigorous assessment of the current state, and future potential, of Greater Manchester's economy. Commencing ten years on from the path-breaking Manchester Independent Economic Review, it provides a fresh understanding of what needs to be done to improve productivity and drive prosperity across the city region.

This latest update, the Greater Manchester Independent Prosperity Review: Evidence Update is a key part of the sustained work done by researchers at the Greater Manchester Combined Authority – with input and challenge from experts. The update explores seven inter-connected thematic areas: carbon neutrality, health inequalities, productivity and the business base, the labour market, skills utilisation and employer investment in skills, trade, and transport in light of the significant economic developments experienced since 2019 (Covid-19, UK's exit from the European Union and the energy and inflation shock).

This report, alongside the six other research reports on the thematic areas listed above, forms part of a suite of work from which the summary, the Evidence Update: Reflections Report is drawn. The evidence update will be used to inform the refresh of the Local Industrial Strategy.

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# Executive Summary

In 2019, the Greater Manchester Independent Prosperity Review (IPR) made clear that, to support economic growth, ‘parts of Greater Manchester with lower productivity, pay and living standards need access to jobs in the centre and better jobs locally. This requires an integrated transport system.’<sup>1</sup>

Greater Manchester has made real progress on this in recent years. The city region is delivering the Bee Network – Greater Manchester’s (GM) plan for an integrated transport system which will join together buses, trams, cycling and walking and rail - helping to support population growth and create healthier and more attractive places (subject to less congestion and pollution) with high levels of access to opportunities. This will create a rich and equitable talent pool for employers, ultimately supporting sustainable economic prosperity across the city region. Greater Manchester has secured £1.07bn from the City Region Sustainable Transport Settlement to enable early priorities in GM’s Five-Year Transport Delivery Plan (2021-2026)<sup>2</sup>, published in 2021, to be delivered.

The Greater Manchester Transport Strategy 2040<sup>3</sup> (the 2040 Strategy) (2021) provides a robust guide to delivering this ‘virtuous circle’ and achieving GM’s vision for a greener, fairer, and more prosperous city-region. It sets out a target for the ‘Right Mix’ of transport modes on GM’s network: for at least 50% of all journeys in Greater Manchester to be made by public transport or active travel by 2040. This would mean reducing car trips from over 60% in 2017 to no more than 50% of trips per day by 2040. Following this pathway is vital if the city region is to make progress towards its carbon reduction goals while supporting economic growth.

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<sup>1</sup> GMCA (2020). *GM Independent Prosperity Review: Reviewers’ Report*. Available at: [Greater Manchester Independent Prosperity Review by Greater Manchester Combined Authority - Issuu](#)

<sup>2</sup> TfGM (2021). *Our Five Year Transport Delivery Plan*. Available at [Our Five Year Transport Delivery Plan | Transport for Greater Manchester \(tfgm.com\)](#)

<sup>3</sup> TfGM (2019). *The Greater Manchester Transport Strategy 2040*. Available at: [Greater Manchester Transport Strategy | Transport for Greater Manchester \(tfgm.com\)](#)

There are some longstanding challenges to achieving this, however, that GM has long been aware of and is working to tackle through delivery of the Bee Network. Greater Manchester residents are also continuing to adjust to the significant shocks of the pandemic and cost of living crisis.

The way some people travel (or whether they travel much at all) has evolved significantly since the start of the pandemic. Some have benefitted from increased digital and home working; or have started walking and cycling more as part of wider lifestyle changes. Others (especially people on low incomes) have fewer choices about how, when or where they travel for day-to-day activities and may have become more reliant on using cars due to disruption and reductions to public transport services or safety concerns. As the cost of second-hand vehicles and fuel continues to increase, the cost of running a car is becoming more of a burden for many households, and particularly for those on low incomes.

Addressing this uneven recovery needs to be a key focus - and the city region may need to move faster than the Greater Manchester Independent Prosperity reviewers originally suggested - to avoid a 'vicious cycle' of worsening health, more congested and polluted places with low access to opportunities and ultimately a poorer talent pool for employers, leading to economic decline as the transport system fails to link people with opportunities.

There is a need to reconsider how to tackle existing challenges and address new ones, to give people affordable, genuine travel options, and in doing so to support inclusive, sustainable economic growth and better health outcomes for people living in Greater Manchester.

To remove barriers to prosperity and to make the most of infrastructure investment that can boost productivity and employment across our city-region (as emphasised in the Greater Manchester Independent Prosperity Review) GM urgently needs to continue to improve:

- access to jobs, education and training opportunities by sustainable modes;
- public health, recognising the extent to which active travel can contribute to physical and mental wellbeing;
- efforts to decarbonise the transport sector;
- the high cost of travel and the impact of congestion; and

- skills shortages in the transport sector.

Greater Manchester needs to continue to deliver the Bee Network at pace, to address all of these critical challenges.

In Greater Manchester, including via the Bee Network, local government is playing a significant role in delivering the desired economic and social outcomes. To support this interventionist approach, which looks to reform, integrate, and strengthen public and active transport options, GM needs more funding to recover from the impact of Covid-19 and to expand public transport services (particularly bus services which have greater potential for rapid expansion, especially following agreement around bus franchising) and to reduce fares. The city region also requires greater investment in active travel infrastructure, the widespread roll-out of electric car clubs and other shared mobility services, investment in national and local travel behaviour change programmes and the establishment of national road traffic reduction targets and traffic speed reduction measures (across GM's strategic and local road networks).

Greater Manchester needs a public transport and active travel renaissance, in the form of the Bee Network, and it needs it quickly. The city region's strategic plans have put it on the right, long-term course to deliver a transport offer that enables its residents to fulfil their potential. In the short-term, there should be continued work in partnership with Government to put Greater Manchester on a sustainable growth trajectory. This is particularly important as we recover from the pandemic and as people see their cost of living continuing to rise.

# 1. Introduction

## 1.1 Scope

The Greater Manchester Independent Prosperity Review Reviewers' Report (2019) made a clear recommendation: 'Parts of Greater Manchester with lower productivity, pay and living standards need access to jobs in the centre and better jobs locally. This requires an integrated transport system.' The report also contends that further devolution of transport (and other) powers will be required to deliver sustained improvements in living standards for the people of Greater Manchester.

Since the publication of the Independent Prosperity Review and subsequently the Greater Manchester Local Industrial Strategy in June 2019<sup>4</sup>, the UK and Greater Manchester economies have undergone a period of acute turbulence and change.

As adjustments to the impacts of the pandemic and cost of living crisis are made, consideration is required as to whether the IPR's recommendations remain relevant and useful or whether there are new challenges and opportunities (in addition to those outlined in the Reviewers' Report in 2019) that GM should now work to address.

Rather than a fundamental shift in focus, following this period of change, GM needs to consolidate the vision-led approach and action already being taken pre-pandemic. This will involve building on those findings and reducing the productivity gap, improving access to jobs and creating a more integrated, devolved transport system for Greater Manchester, while recognising the need to adapt and address new and previously under-considered elements to these challenges.

One direct consequence of the Covid-19 pandemic has been the very significant reductions in patronage across public transport networks. Central and local government financial support have largely sustained rail, Metrolink and bus networks, but at a significant cost, as ticket revenues have reduced and remain significantly below pre-pandemic levels. The cost-of-living crisis has impacted many

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<sup>4</sup> GMCA (2019) Greater Manchester Local Industrial Strategy. Available at: [Greater Manchester's Local Industrial Strategy - Greater Manchester Combined Authority \(greatermanchester-ca.gov.uk\)](https://www.greatermanchester-ca.gov.uk/local-industrial-strategy)

households, which may again be reflected in the reduced demand for public transport; with the increases in fuel costs representing another challenge, both for the public transport and business sectors, and more widely for car-owning households.

It is within this very challenging wider context that GM will be required to operate and develop its transport networks, recognising the need to try to support households with transport costs, contribute to GM's challenging carbon reduction obligations, and actively work to sustain and promote economic prosperity across the city-region.

Transport remains central to ambitions for a Greater Manchester focussed on reducing inequalities and improving access to economic opportunity across the city-region, unlocking new sites for residential and commercial development, promoting improved health and wellbeing through active travel, and making a significant contribution to the decarbonisation of the city region's economy. Public transport is especially important for connecting young people to places of learning. 64% of young people (aged 16-18) use public transport every week<sup>5</sup>. The Mayor's Our Pass initiative, which provides free bus travel for 16–18-year-olds, is helping to widen accessibility to public transport and embedding behaviours around the use of public transport as the first choice option from an early age.

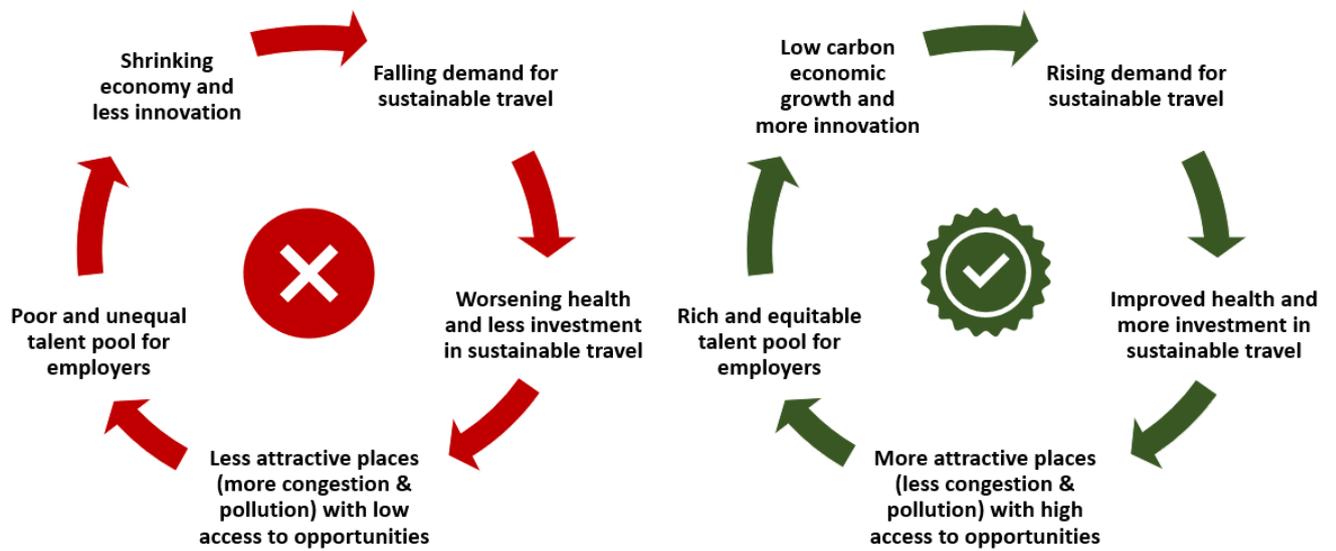
This report identifies major challenges that Greater Manchester must overcome to establish a virtuous cycle (see Figure 1) in which the emerging 'Bee Network' - Greater Manchester's plan for an integrated transport system which will join together buses, trams, cycling and walking and rail - can meet rising demand for active travel and public transport, and in turn help support sustainable economic prosperity in all parts of Greater Manchester.

The Covid-19 pandemic legacy and on-going cost of living crisis are reshaping these challenges, and Greater Manchester is responding through a process of adaptive planning to establish the policy measures that will deliver the vision for 2040.

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<sup>5</sup> TfGM (2021) The Greater Manchester Travel Diary Surveys (TRADS). Information available at: [Greater Manchester Travel Diary Surveys | Transport for Greater Manchester \(tfgm.com\)](https://www.tfgm.com/greater-manchester-travel-diary-surveys)

**Figure 1: How high demand for active travel and public transport is needed for sustainable economic growth - illustrative vicious and virtuous cycles**



In [‘Delivering change: Making transport work for cities’](#) the Centre for Cities summarises some of the key mechanisms that make good transport essential for growth in cities as:

**Helping people access jobs.** Good transport links can widen people's job-search area and help them find employment. It can also reduce commuting times and reduce the cost of living. Public transport is especially important for lower income groups, where car access is lower. High-skilled workers are more likely to travel across longer distances to work, especially if they are following good job opportunities.

**Supporting innovation, productivity and economic growth in cities and the national economy.** Transport can encourage firms to locate near one another, bring them closer to their supply chain and share expertise. The increase in concentration (mainly referred to as 'agglomeration economies') improves firms' performance and increases productivity.

**Helping shape greener and healthier places.** Reducing the reliance on cars and promoting greener modes of transport (such as public transport or cycling) can relieve congestion and reduce carbon emissions. Good transport can also improve individuals' health and reduce healthcare costs.

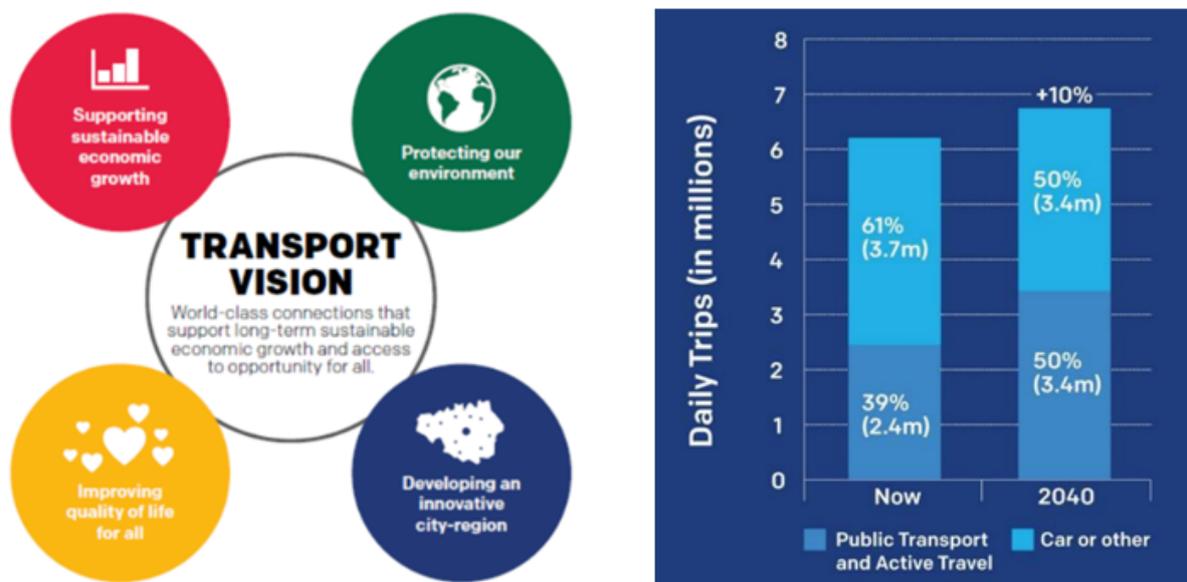
**Helping cities attract new firms.** Good transport networks can reduce costs and improve access to skilled labour. Reducing business and freight road travel time by 5 per cent can save business up to £2.5 billion every year (0.2 per cent of GDP). Almost 60 per cent of UK firms consider transport infrastructure as a major influence on their business location.

**Unlocking new development sites for business and housing.** In order for new houses or businesses to be built, roads, bus services and rail must be in place to service them.

It is only through establishing a virtuous cycle, like that set out in Figure 1, that Greater Manchester will be able to deliver the type of benefits outlined above in the long-term.

## 1.2 Summary of Greater Manchester Transport Strategy

In January 2021, an up-to-date version of GM's statutory Local Transport Plan (LTP) which comprises the Greater Manchester Transport Strategy 2040 (the '2040 Strategy')<sup>6</sup>, a new Five-Year Transport Delivery Plan (2021- 2026) (the 'Delivery Plan') and ten Local Implementation Plans (LIPs)<sup>7</sup> was published. The 2040 Strategy sets out a vision for Greater Manchester to have 'World class connections that support long-term, sustainable economic growth and access to opportunity for all' underpinned by four key goals (set out in the infographic below).



These 2040 Strategy goals help to focus attention on providing a transport system for Greater Manchester which supports: inclusive, sustainable economic growth and the efficient and effective movement of people and goods (including by preventing increased congestion, investment in an integrated transport network, enabling better access to skills and markets and good maintenance of our infrastructure); improved quality of life for all; protecting our environment and supporting GM's target to be net

<sup>6</sup> TfGM (2019). The Greater Manchester Transport Strategy 2040. Available at: [Greater Manchester Transport Strategy | Transport for Greater Manchester \(tfgm.com\)](https://www.tfgm.com/transport-strategy)

<sup>7</sup> TfGM (2021). Our Five Year Transport Delivery Plan (with Local Implementation Plans as appendices). Available at [Our Five Year Transport Delivery Plan | Transport for Greater Manchester \(tfgm.com\)](https://www.tfgm.com/our-five-year-transport-delivery-plan)

zero carbon by 2038 as well as improving air quality; and capitalising on new technology and innovation. The goals of the 2040 Strategy are closely aligned with Government's strategic objectives for transport (growth and productivity, reducing social and economic disparities and decarbonisation) as well as those set out in the Greater Manchester Strategy Refresh<sup>8</sup>. Overall, the 2040 Strategy sets out a place-based approach: by promoting the integration of transport, housing and regeneration, GM aims to ensure it is delivered and funded through integrated investment.

The 'Right Mix' target for 2040 represents a quantification of the transport vision, of which sustainable economic growth is a key goal. GM's target is for 50% of journeys to be made by public transport or active travel by 2040, to support the vision for a greener, fairer, and more prosperous city-region. This would mean reducing car trips from over 60% in 2017 to no more than 50% of trips per day by 2040.

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<sup>8</sup> GMCA (2021). *Good Lives for all*, Greater Manchester Strategy. Available at <https://aboutgreatermanchester.com/the-greater-manchester-strategy-2021-2031/>

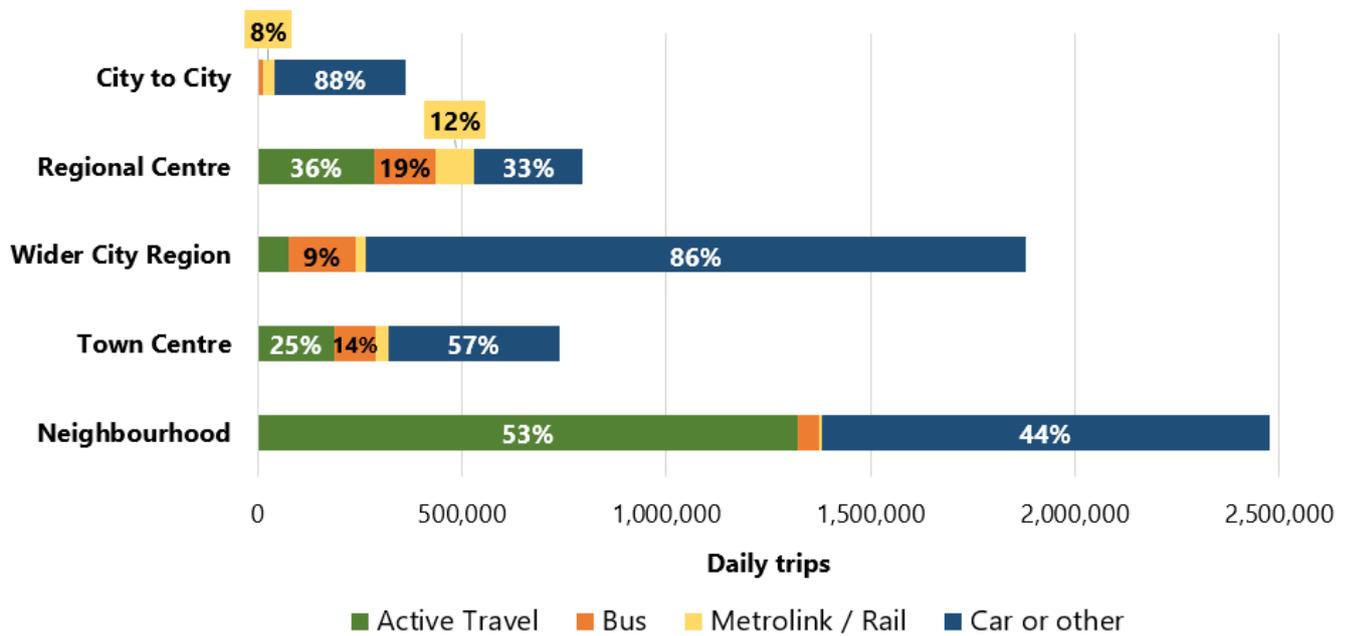
## 2. Overview of Greater Manchester Travel

People travel for a range of reasons, such as getting to work, to the shops or to access education or leisure facilities. This section considers the types of trips made by different socio-economic groups in different parts of Greater Manchester, to enable better understanding of those factors influencing people's travel behaviour before Covid-19 and whether – because of the pandemic and current downward pressure on disposable incomes – travel behaviour amongst people in different groups and locations has changed or stayed the same.

### 2.1 Travel demand by spatial theme

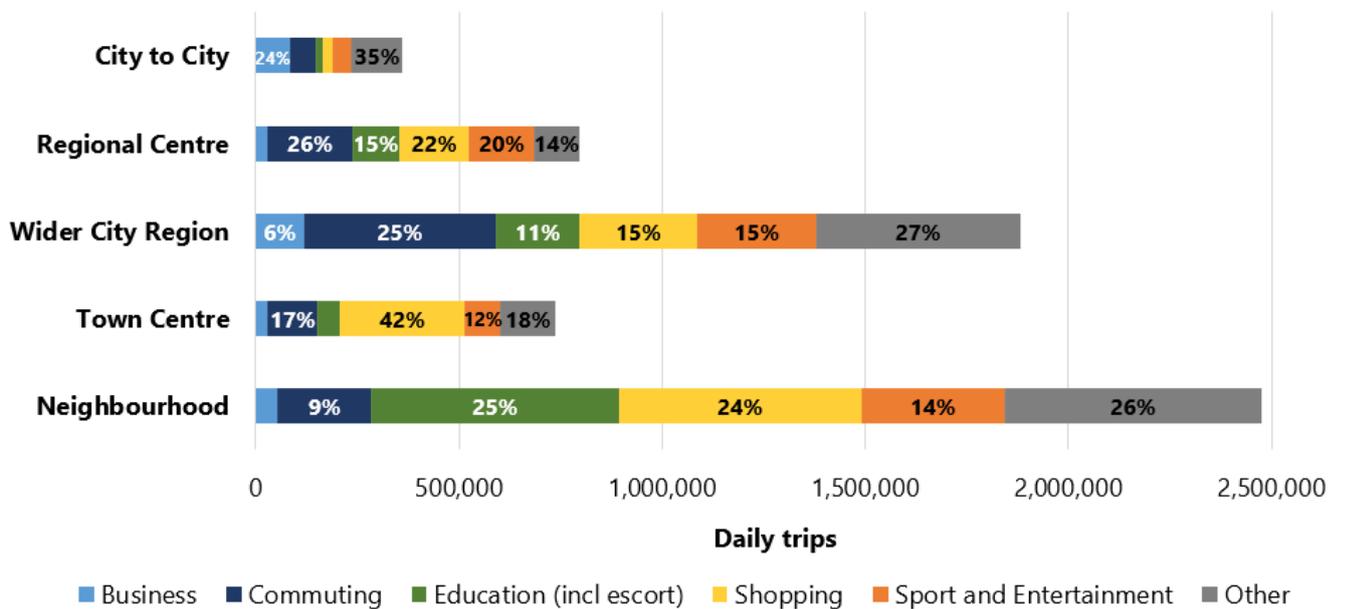
The 2040 Strategy segments the incredibly complex Greater Manchester travel market into different types of trips, called 'spatial themes'. This enables an integrated set of interventions to be developed to address specific issues in different parts of the city-region and for different types of travel. Figure 2 indicates the scale of trips by mode for each of these spatial themes and includes a 'Town Centres' spatial theme. This new spatial theme has been developed as part of an on-going review of the 'Right Mix' framework. The full set of spatial theme technical definitions are included in the Annex of this report.

**Figure 2: Main mode by spatial theme - daily trips**



Source: 2017 Right Mix baseline

**Figure 3: Main mode by journey purpose - daily trips**



Source: 2017 Right Mix baseline

Figure 2 and 3 can be summarised as follows:

- **Neighbourhood:** the largest spatial theme in terms of volume of trips, accounting for c.40% of all trips. Over 50% are made by walking and cycling.

Despite being under 2km in length, over 40% are by car. Only around 10% are commuting or business trips.

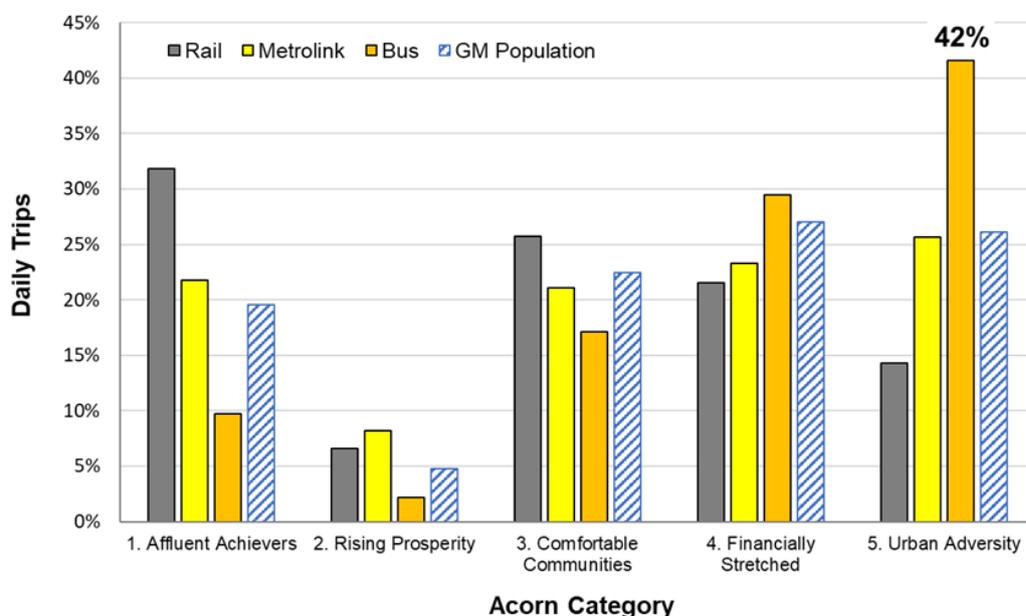
- **Town Centres:** this spatial theme accounts for 12% of all trips. Car is the dominant mode (57%), with 1 in 4 of these trips made by walking or cycling. Town Centres are important for the bus market, with this spatial theme having the second highest bus mode share at 14%. Shopping is the dominant journey purpose at over 40% - far higher than any other spatial theme.
- **Wider City Region:** the second largest spatial theme in terms of volumes trips, accounting for c.30% of all trips. These trips are over 2km and to locations outside the Regional Centre / Town Centres – as a result car travel dominates (86%). However, due to the absolute scale of this market, the 9% mode share for bus means that around 1 in 3 bus trips are associated with this spatial theme. 1 in 4 are commuting trips, with these accounting for 43% of all commuting trips.
- **Regional Centre:** this spatial theme accounts for 13% of all trips. It has both the highest bus (19%) and Metrolink / rail (12%) mode shares of all spatial themes. Active travel is also particularly important with over 1 in 3 trips made by either walking or cycling. As a result, this is the spatial theme with the lowest car mode share at only 33%. Over 1 in 4 trips are for commuting – the highest of all the spatial themes.
- **City to City:** this spatial theme (like the Wider City Region) is highly car dominant (88%) and the trips are long – involving an end at least 10km outside the Greater Manchester boundary. Nearly 1 in 4 of these trips are for business purposes - the highest of all the spatial themes. Whilst c.17% of these trips are for commuting purposes, they represent only c.6% of the entire Greater Manchester resident commuter market.

## 2.2 Profile of Public Transport users

Figure 4 shows that, pre-Covid-19, over 70% of bus trips were made by those who typically have below average disposable income, and only limited savings. Around

40% of individuals categorised as Financially Stretched or Urban Adversity are ‘just managing to make ends meet’ (see Section 3.2 for more detail on these categories).

**Figure 4: Pre-Covid profile of public transport users by mode (GM TRADS 2017-19)**



Source: Acorn 2020 © CACI Limited. The applicable copyright notices can be found at <https://www.caci.co.uk/copyrightnotices.pdf>

Further data has been collected between February 2021 and January 2022, and whilst the limitations of data collected during the pandemic must be noted, the profile of bus users has remained broadly consistent. The rail market however became more reliant on people in the Financially Stretched category than it was in 2019, whilst there was evidence of a substantial decline in the share of rail (down to 11% from 26%) and Metrolink (down to 10% from 21%) trip making by Comfortable Communities.

These findings point to a ‘recovery’ that has been uneven in our city-region. The profile of bus users has remained broadly consistent (some people on low incomes are not able to make a choice to change how they travel or to work from home, for instance) but the profile of rail users has changed (more affluent people are more likely to be employed in a role where there is choice about working from home).

Increasing the appeal of public transport to a wider market is a major focus of GM’s work programme during 2022 and beyond, for a number of key reasons. Firstly, the need to be able to provide the sustainable connectivity – namely public transport and active travel - that provides businesses and communities with the supply of labour,

skills and jobs that they both need to prosper. Such an approach can expand labour and skills supply without increasing congestion or carbon emissions and helps increase physical activity levels across a broader population. In turn, the additional ticket revenues can be invested back into the franchised bus and broader public transport system to sustain its operation and ideally extend its reach.

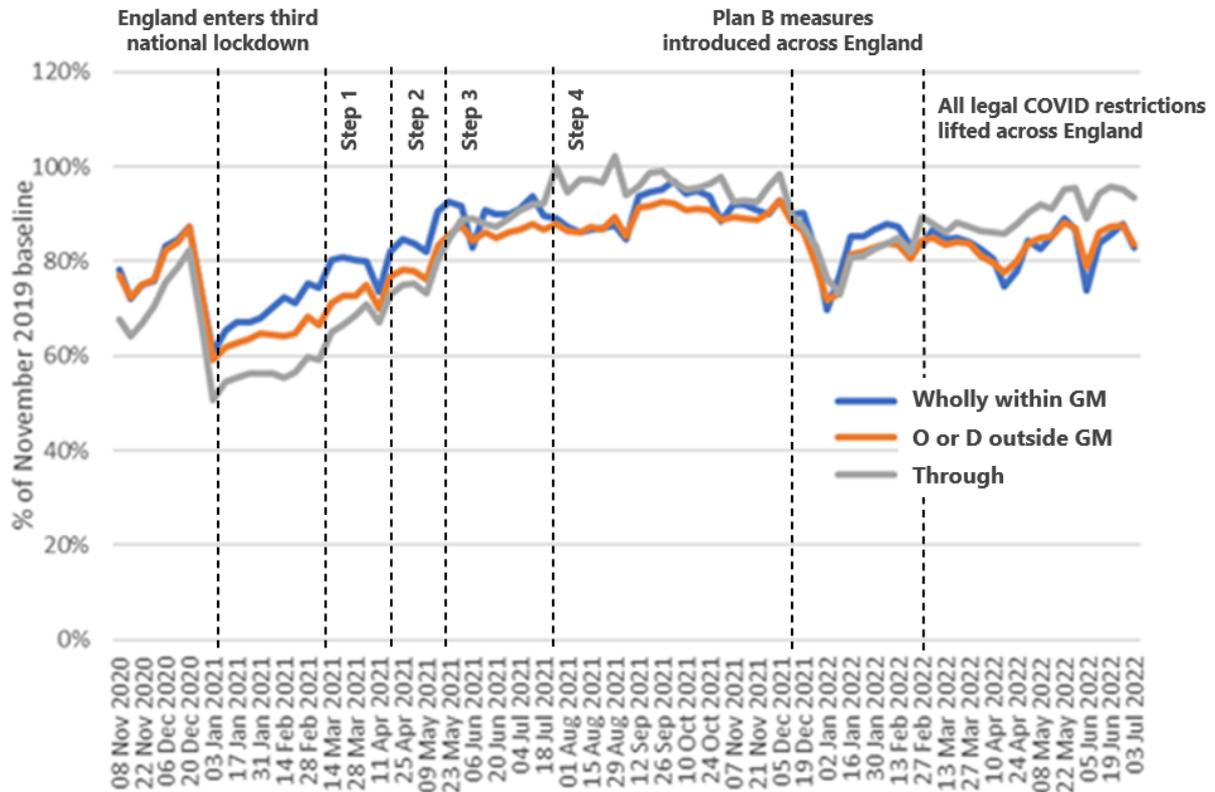
## **2.3 Overview of post-Covid-19 travel demand**

Demand for public transport in Greater Manchester has not ‘bounced back’ to pre-pandemic levels.

Since the onset of the pandemic, mobile network data has been used to monitor travel demand across all modes. Figure 5 uses mobile network data to show the weekly recovery of travel demand against the November 2019 baseline.

As of June 2022, demand was hovering at c.85%. During the autumn/winter (pre-omicron) period in 2021 weekend trips recovered to c100% (slightly over for trips wholly within Greater Manchester). Since the start of 2022, there has been a reduction in weekend travel, particularly at times associated with retail and the night-time economy – something that may be linked to the cost-of-living crisis.

Figure 5: Recovery of travel demand (weekly) - November 2020 to July 2022



Source: Mobile network data analysis by TfGM Highways Department

Figure 6 shows that, during July 2022, the national picture broadly aligned with the Greater Manchester one for most means of transport. The highways mix varies by vehicle type, but overall traffic levels were close to 2019 levels. Demand across the public transport modes is over 20% down on pre-Covid-19 levels, and for bus in particular there have been some signs of recent decline from May 2022 to the period reported in Figure 6.

**Figure 6: Department for Transport (DfT) and TfGM Highways Department analysis – week to 10<sup>th</sup>/11<sup>th</sup> July 2022 compared to 2019.**

<b>Category</b>	<b>GB</b>	<b>Category</b>	<b>GM</b>
	<b>% of base figure</b>		<b>% of base figure</b>
<b>Cars</b>	97%		
<b>Vans</b>	116%		
<b>HGVs</b>	107%		
<b>All traffic</b>	101%	<b>All traffic</b>	96%
<b>National Rail</b>	84%	<b>Piccadilly footfall</b>	84%
<b>TfL Tube</b>	75%	<b>Metrolink</b>	76%
<b>Non-London Bus</b>	82%	<b>Bus</b>	79%

*week to 11 July vs. 2019 (Feb 20 for rail)*

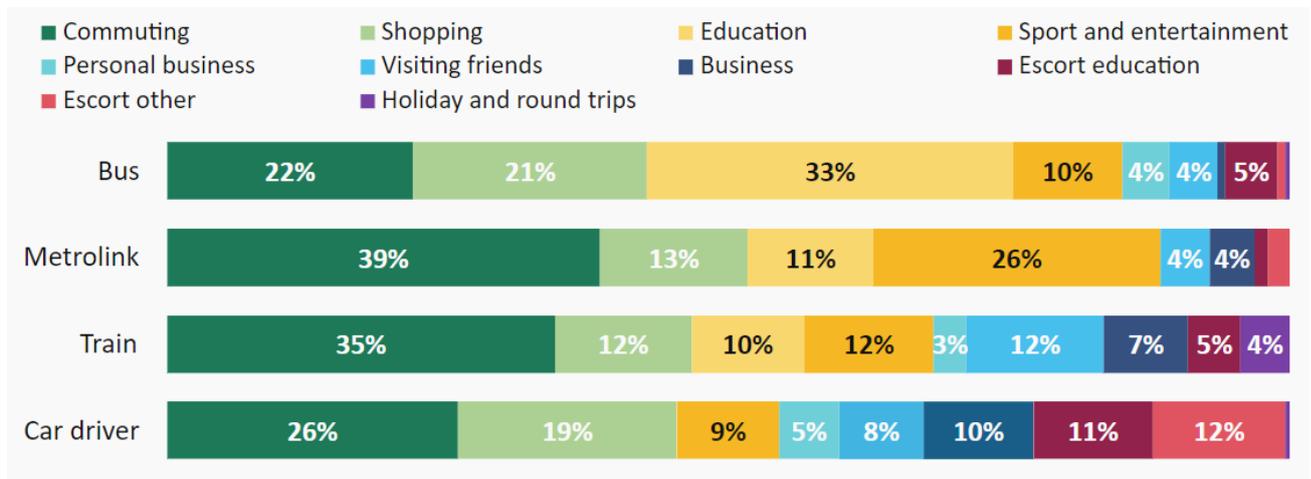
*week to 10 July vs. 2019*

Figure 7 shows that during 2021 (a period impacted by Covid-19 related restrictions) commuting was particularly important for Metrolink and Rail (35% or more), whilst education (33%) and shopping (21%) were particularly strong reasons for travelling by bus. The comparatively high reliance of bus on shopping trips (combined with a high reliance on users from deprived communities) makes it particularly vulnerable to the short-term impacts of the on-going cost of living crisis.

Figure 8 provides a direct pre-Covid-19 comparison. This points to a reduction from the pre-Covid-19 period to the 2021 period in the proportion of journeys made for commuting across all the public transport modes, and a slight increase for car driver commuting. The same pattern is also applicable to shopping.

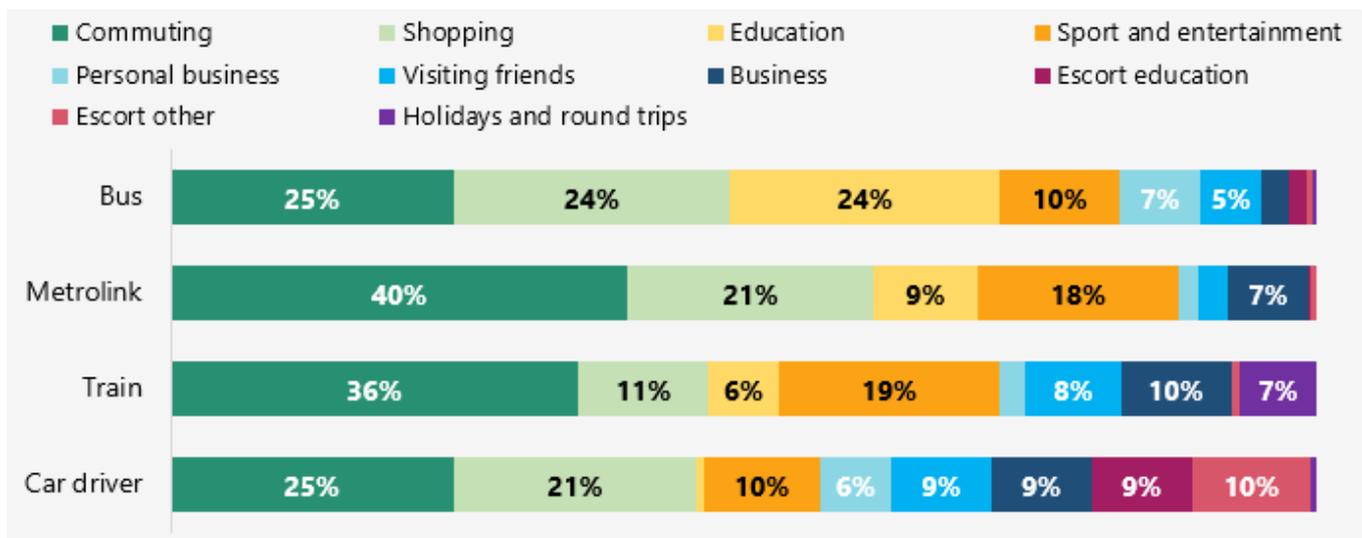
Comparison of Figures 7 and 8 shows how the public transport market for accessing education or training opportunities remained comparatively resilient in comparison to commuting and shopping – indeed in 2021 education became the primary reason for travelling by bus. The increased share of escort education car driver trips (11%) however highlights the significant opportunity to encourage more travel to education by sustainable modes.

**Figure 7: Journey purpose - % share of selected modes**



Source: GM TRADS 2021

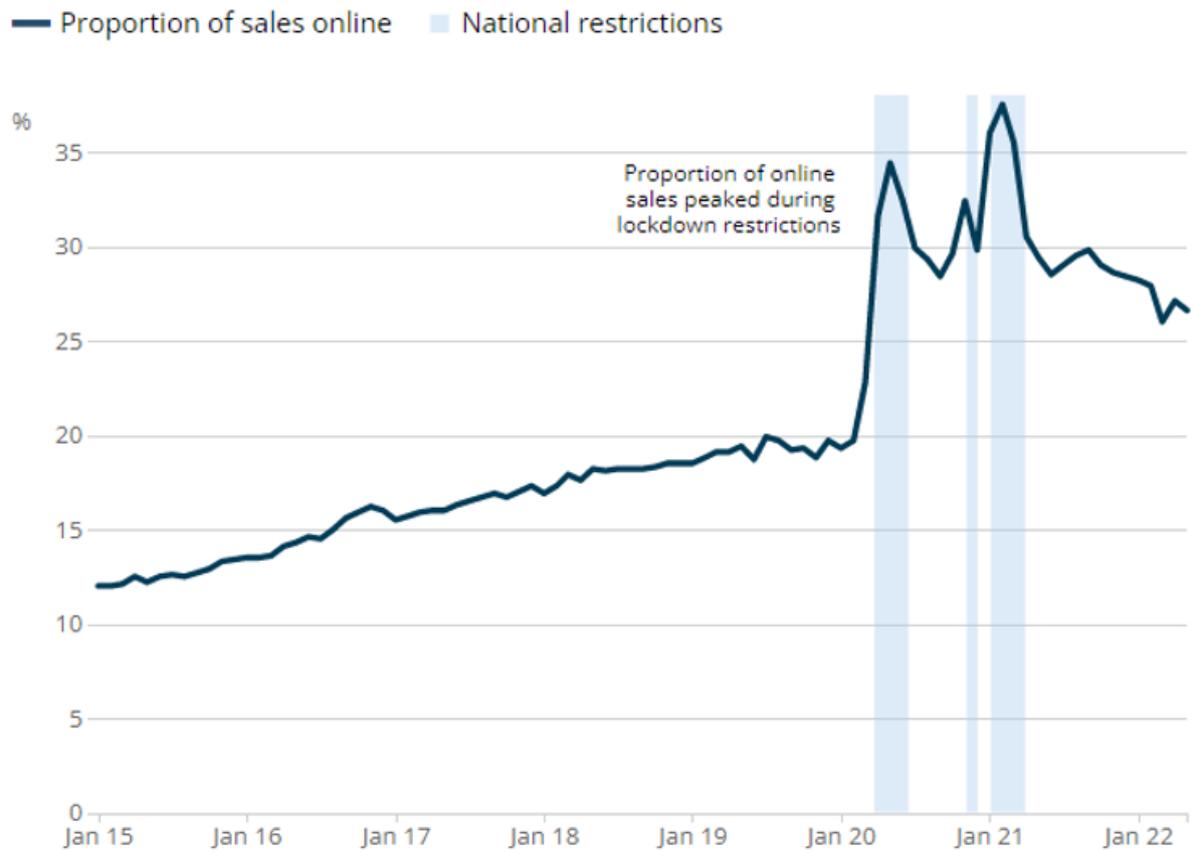
**Figure 8: Journey purpose - % share of selected modes**



Source: GM TRADS 2017-19

Figure 9 shows online retail sales and illustrates that the pandemic has provided a ‘step change’ in what was already a rising trend for online retail sales. This has clear implications on travel (which may be substituted for online activity), but also on placemaking / land-use planning, and the economy more broadly through employment altering in response.

**Figure 9: Online retail sales (% of total sales)**



**Source: Office for National Statistics – Monthly Business Survey – Retail Sales Inquiry**

# 3. Key challenges to establishing a sustainable travel virtuous cycle

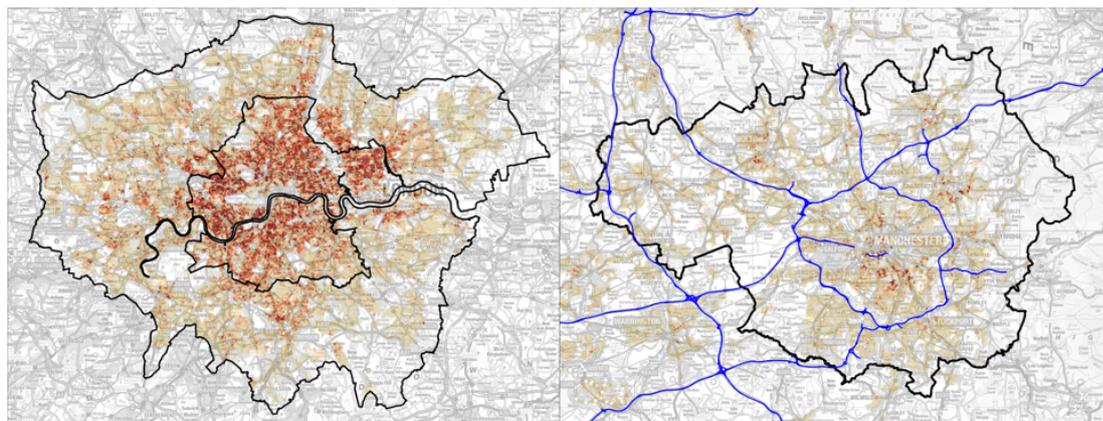
## 3.1 Density and polycentricity

Greater Manchester's population is growing. The [2021 census results](#) show that it has increased by 6.9% between 2011 and 2021 (faster than national, regional, and metropolitan county averages) and there has been significant population growth in the centre of our city region – in Manchester and Salford – over the last ten years, in particular. This broad trend has continued for three decades and provides further evidence of the popularity of the conurbation as a place to live and work for new and existing residents. This presents challenges – in the form of increased travel demand and ensuring GM's network can accommodate this without increasing congestion and carbon emissions – but also huge opportunities, including making it essential to plan development and transport in a more integrated way, through the Bee Network. GM has well-developed spatial plans – including the draft Places for Everyone Plan and Stockport Local Plan – that ensure the location of new development where there is good access to public transport – and in several of Greater Manchester's key towns, population growth is higher than most other areas across the North West. Attracting development at sufficient scale and density is one factor that could support new financially sustainable public transport services.

However, the comparatively low density and polycentric nature of Greater Manchester has major implications for travel, including but not limited to, the ability to operate commercially viable high frequency public transport networks - a challenge which has been exacerbated by the pandemic.

Mapping of Census 2011 resident population density at output area level shows the difference between Greater Manchester and Greater London (note: Census 2021 population density is not currently available for local geographies below the Local Authority level).

**Figure 10: Usual resident population density: London vs. Greater Manchester (Census 2011)**



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**Population Density by Output Area (Census 2011)**



Research published by Centre for Cities in March 2022 identifies that just 35% of residents in a selection of UK ‘Northern Cities’ are well connected by public transport to their centres on average, in comparison to nearly 70% in a selection of ‘European equivalents’. This research emphasises the importance of population density in supporting high quality public transport networks by acknowledging that *‘much of the disparity can be attributed to differences in population density among these cities.’*

Providing high quality public transport access to Greater Manchester’s regional centre is undoubtedly important, but this alone will not meet the needs of residents across the city-region.

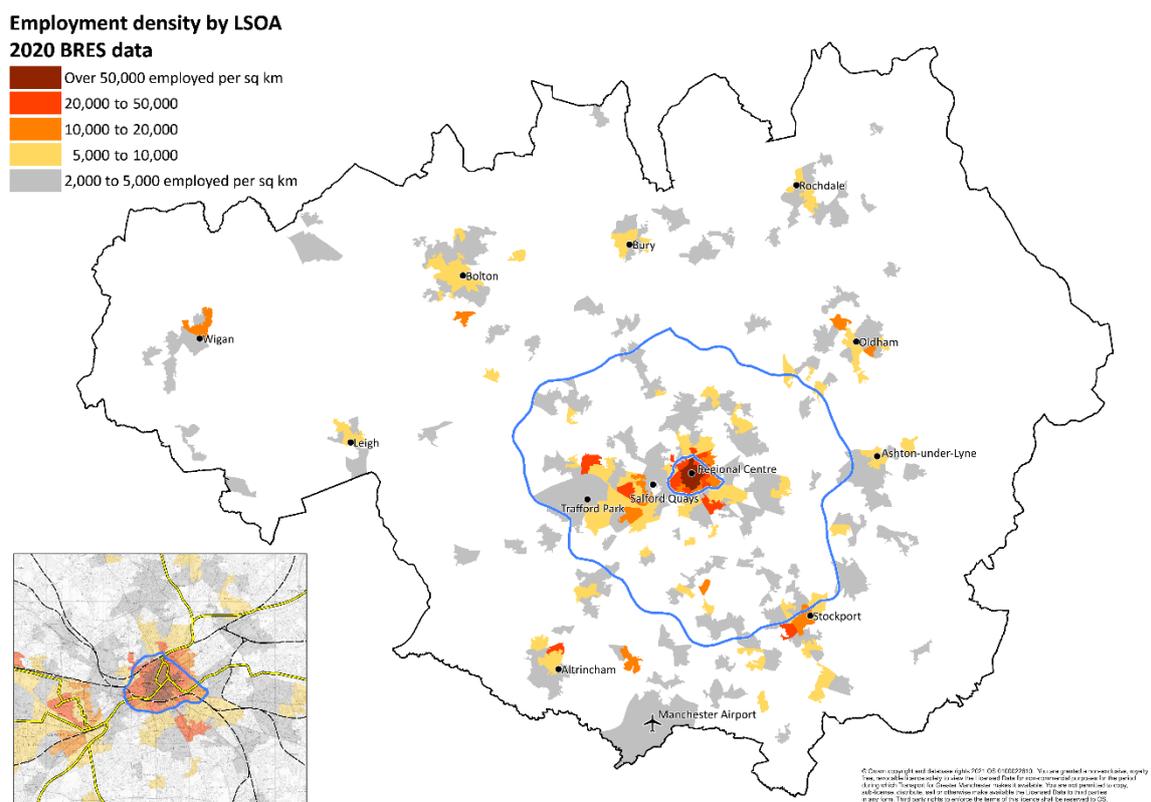
Figure 11 shows the polycentric distribution of Greater Manchester’s employment. The Regional Centre provides the most notable concentration of employment and accounts for c.16% of Greater Manchester total employment, whilst the main town centres (c.10%), Trafford Park (c.3%), and Manchester Airport (c.2%) all stand out - elsewhere the tendency is for employment to be dispersed at relatively low densities.

It is also important to understand density by industry type, noting that the working arrangements, skills, and pay of employees varies greatly across different industries. Figure 12 shows that Financial and Insurance, Information and Communication, and Professional, Scientific, and Technical are industries that are particularly

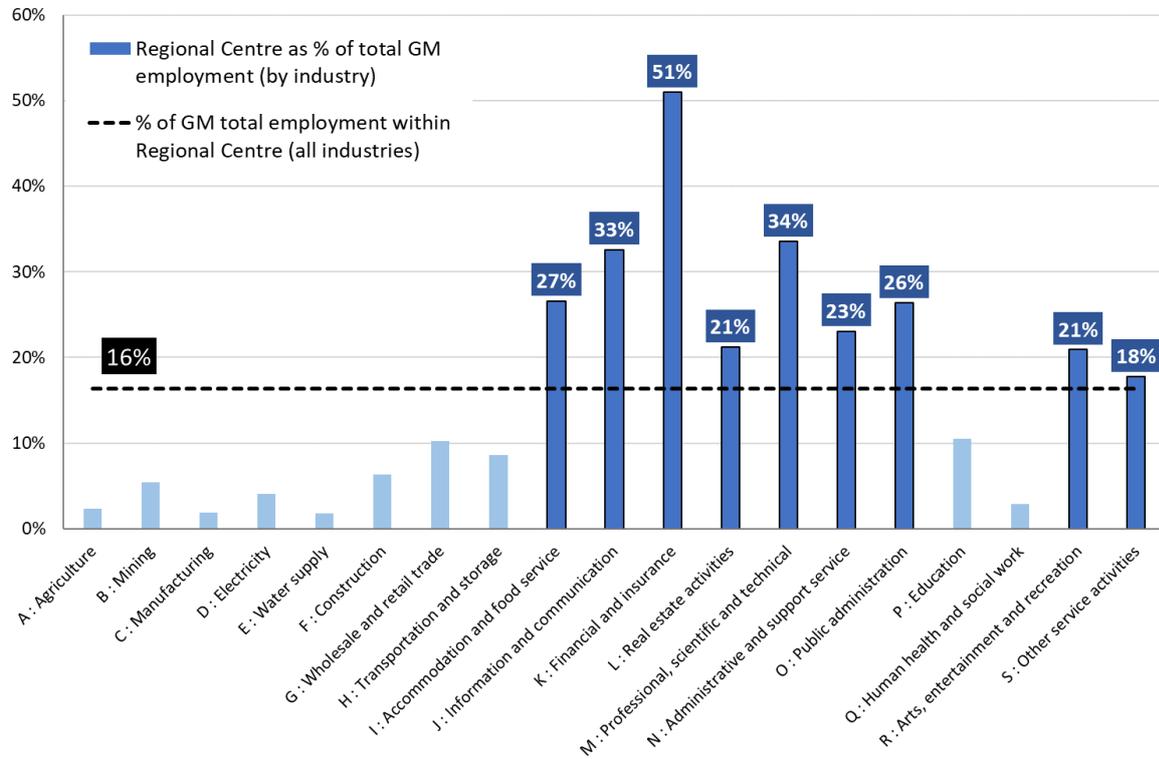
concentrated in the Regional Centre. These industries are both particularly amenable to working from home and make a particularly strong contribution towards the Greater Manchester economy (thereby supporting jobs with high salaries - linking to use of rail-based modes).

This unique (in the context of Greater Manchester) density of employment that is particularly amenable to working from home, is located in the area of Greater Manchester where public transport density is greatest (see Figure 13) – these factors combined have served to redefine the demand for travel to the Regional Centre, and Greater Manchester more broadly. Mobile network data shows that, since Government lifted Covid ‘Plan B’ measures at the end of January 2022, the extent to which travel demand has returned (vs. a pre-Covid baseline) to the Regional Centre has consistently been below overall Greater Manchester travel demand.

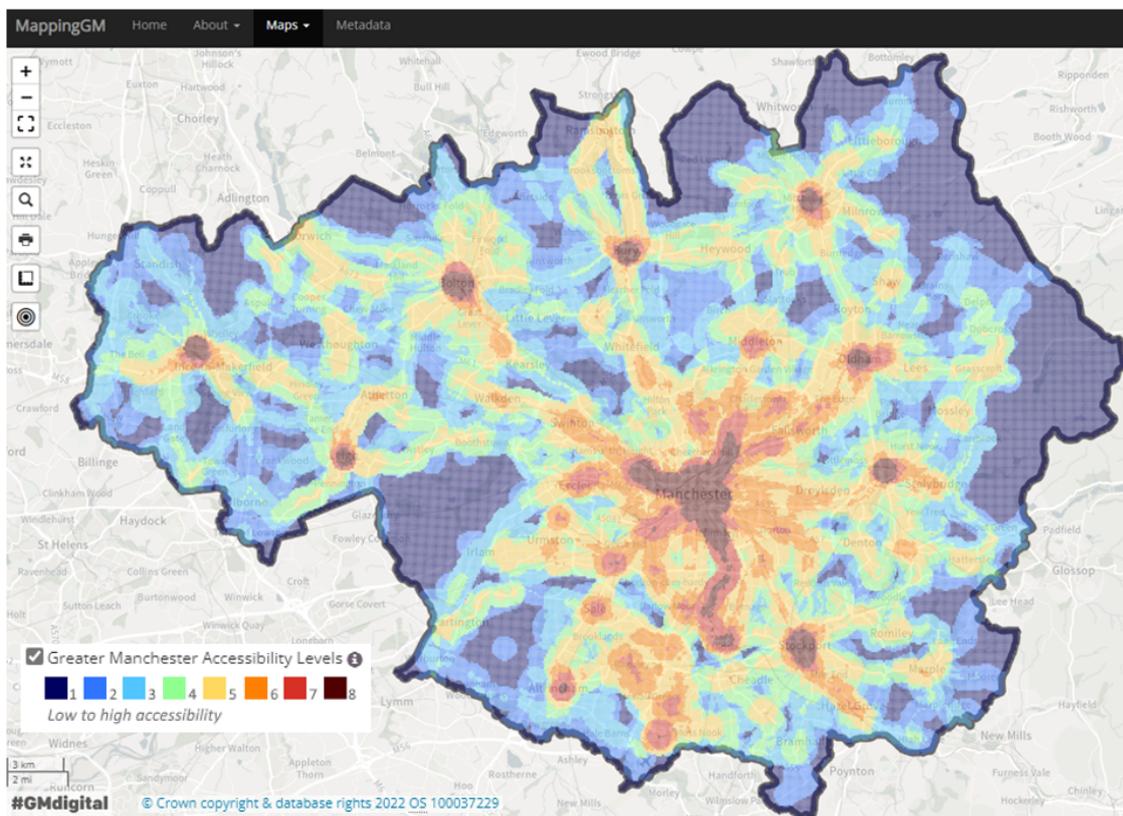
**Figure 11: Employment density (Business Register and Employment Survey (BRES) 2020)**



**Figure 12: Employment by industry within the Regional Centre (as % of total Greater Manchester employment) (BRES 2019)**



**Figure 13: Public transport accessibility in Greater Manchester**



Source: Greater Manchester Accessibility Levels (available on MappingGM)

The Centre for Cities research highlights *'the risk of car-dependent low-rise suburbs keeping local transport revenues down and costing the country billions of pounds in lost productivity – money that could otherwise be spent on building successful London-style transport systems in city regions across the North.'*

In Greater Manchester we are addressing this risk, including through the emerging Bee Network. Greater Manchester is well placed to deliver improvements to local transport that will boost accessibility while recognising that travel demand has been impacted by the pandemic and will continue to be reshaped during the on-going cost of living crisis.

To mitigate against this risk, we are also carefully considering the location and design of new building developments. Greater Manchester's draft Places for Everyone Joint Development Plan is a long-term plan for jobs, new homes, and sustainable growth. It will determine the kind of development that takes place in nine Greater Manchester boroughs, maximising the use of brownfield land and urban spaces while protecting green belt land from the risk of unplanned development. It will also ensure all new developments are sustainably integrated into Greater Manchester's existing transport network or supported by new infrastructure.

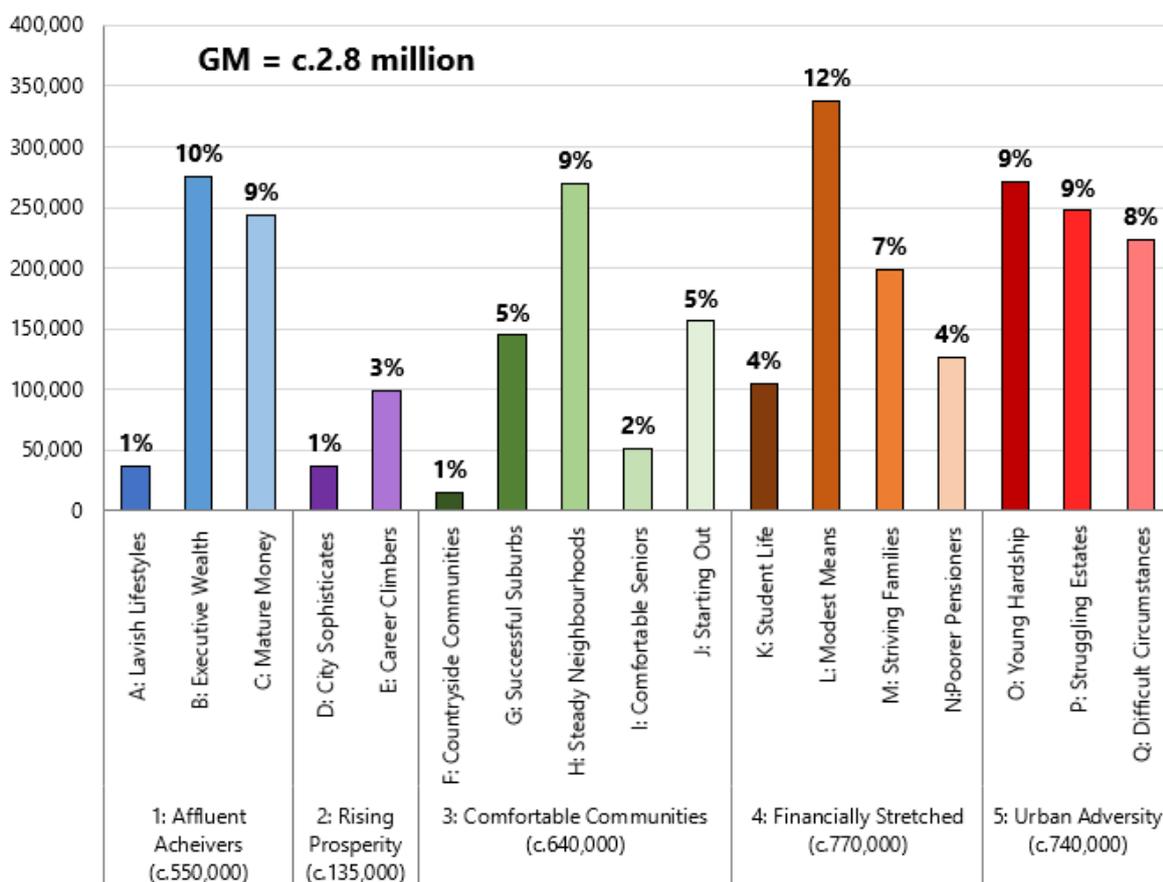
## **3.2 Characteristics of the Greater Manchester resident population**

'Acorn' is a consumer classification system (see Figure 14) which provides insight into the characteristics of communities living in different locations. 53% of the Greater Manchester resident population is classified as either 'Financially Stretched' (including people living in areas of lower value owner occupied housing and rented homes, often with below average incomes) or 'Urban Adversity' (including people living in deprived areas where household incomes are particularly low). The corresponding value for the UK is just 40%. This points to Greater Manchester having a particular stark challenge in respect of deprivation and exposure to the current cost of living crisis in which household incomes are being squeezed.

Figure 14 shows that Greater Manchester has c.1.5m residents categorised as either 'Financially Stretched' or 'Urban Adversity' - these residents are typically:

- up to twice as likely than average to live in households that have no access to car, whilst those that do - are far more likely to be driving older vehicles (which typically perform more poorly in respect of air quality).
- c.50% more likely than average to be unemployed.
- only around 40% report being satisfied with their health.
- only 12% are educated to degree level – this is far lower than the c.1 in 3 within the most affluent categories.

**Figure 14: Acorn profile of the Greater Manchester resident population (2021)**



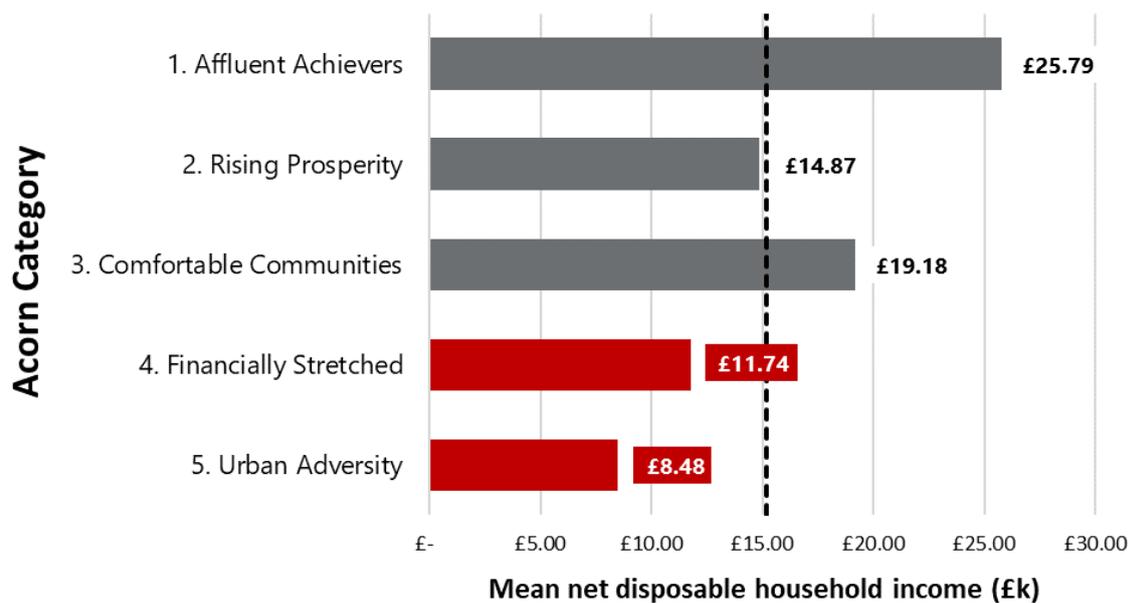
Source: Acorn 2021 © CACI Limited. The applicable copyright notices can be found at <https://www.caci.co.uk/copyrightnotices.pdf>

Figure 15 shows that for ‘Financially Stretched’ and ‘Urban Adversity’ households – mean net disposable income is typically well below the Greater Manchester average (which is also below the UK average). For the most deprived groups within the broader ‘Financially Stretched’ and ‘Urban Adversity’ categories – mean net household disposable income is less than £8,000. The values shown in Figure 15 are prior to the full impact of the recent 2022 surge in inflation being felt. As a result

of this inflation (which at an aggregate level is exceeding wage growth), larger proportions of gross income will be dedicated to essential outgoings – housing costs, tax & insurance, childcare & pensions, food & clothing, travel to work costs and utilities – placing further stress on disposable incomes.

This means that the 53% of Greater Manchester residents who likely had particularly limited disposable income as of 2021, are now likely to be even more vulnerable to experiencing poverty, for example due to the rise in the energy price cap from £1,971 to £2,500 (under the Government’s Energy Price Guarantee) by 1<sup>st</sup> October 2022 (based on ‘typical’ levels of dual fuel consumption paid by direct debit). It also serves as a reminder that Greater Manchester businesses that rely on demand from Greater Manchester residents, could be particularly vulnerable to weakening consumer demand.

**Figure 15: Mean net disposable household income (£k) by Acorn Category (Paycheck Disposable Income 2021)**



Paycheck Disposable Income 2021 © CACI Limited. The applicable copyright notices can be found at <https://www.caci.co.uk/copyrightnotices.pdf>

Both Acorn and English Indices of Deprivation data show the geographic distribution of deprivation. There is a broadly consistent pattern which sees emphasis on the inner urban area, and Greater Manchester’s key centres (except Altrincham) – areas where public transport density is generally at its strongest within Greater Manchester (as already shown in Figure 13). In the English Indices of Deprivation (2019)

Manchester is the second most deprived local authority (based on rank) in England.<sup>9</sup>

This means that, as we continue to plan and deliver the Bee Network, we should be aware that we start from a good position (residents living in the highest areas of deprivation in GM live close to public transport stops and stations) and a key focus needs to be removing barriers to public transport use in these areas, to help rebalance the city-region's economy. GM must continue to work - with support from Government - to improve the quality and affordability of our public transport network, to ensure that people living near to it see it as a realistic alternative to the car when seeking to access the vast array of opportunities already on offer with Greater Manchester.

### **3.3 Personal car keeping in Greater Manchester**

At the start of 2022 there were over 1.1m cars privately registered in Greater Manchester<sup>10</sup>. It is estimated that over 75% of the resident population live in a household with access to at least one car<sup>11</sup>.

Figure 16 shows that across Greater Manchester 31% of households have no access to a car / van, but that the distribution of these households varies considerably by local authority. Census 2011 indicates that the percentage of no car households in Greater Manchester is broadly similar to other metropolitan counties

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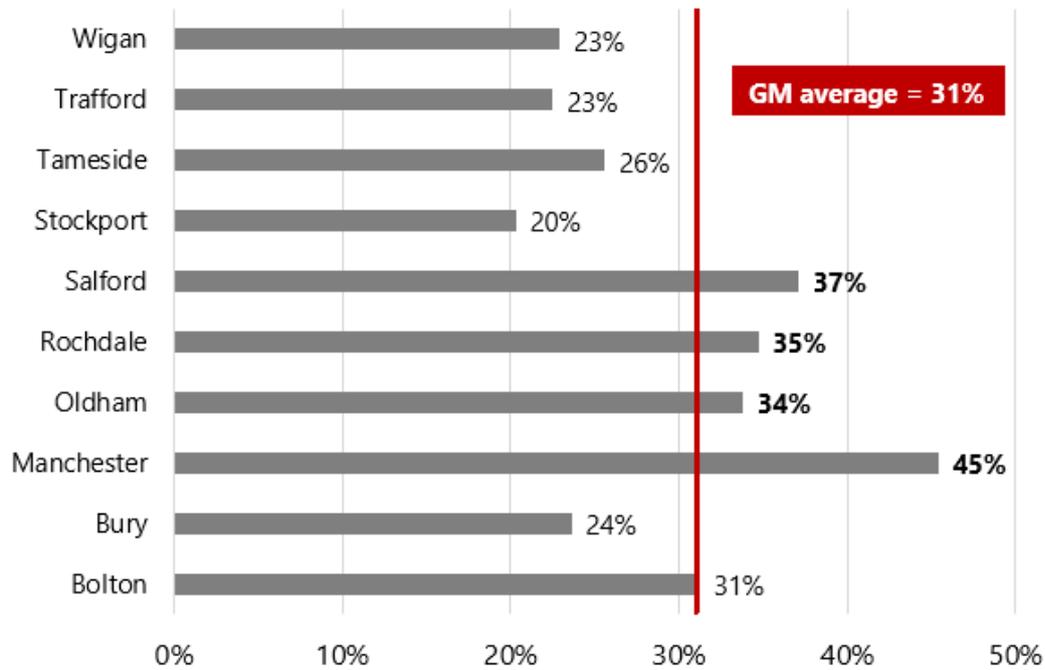
<sup>9</sup> Ministry of Housing, Communities and Local Government (2019). The English Indices of Deprivation 2019. Available at: [The English Indices of Deprivation 2019 \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

<sup>10</sup> Department for Transport, Table VEH0105

<sup>11</sup> GM TRADS 2017-2019

such as the West Midlands and West Yorkshire, but considerably lower than the 42% in Greater London.

**Figure 16: Percentage of households with no access to a car / van**



Source: GM TRADS 2017-19

Figure 17 provides more detail on the spatial distribution of no-car households using Census 2011 data - this clearly shows that the high density inner urban core and main town centres play an important role in facilitating sustainable travel choices. But

as previously noted, these areas also account for some of the city-region's most deprived communities.

**Figure 17: Concentrations of households with no car or van available**

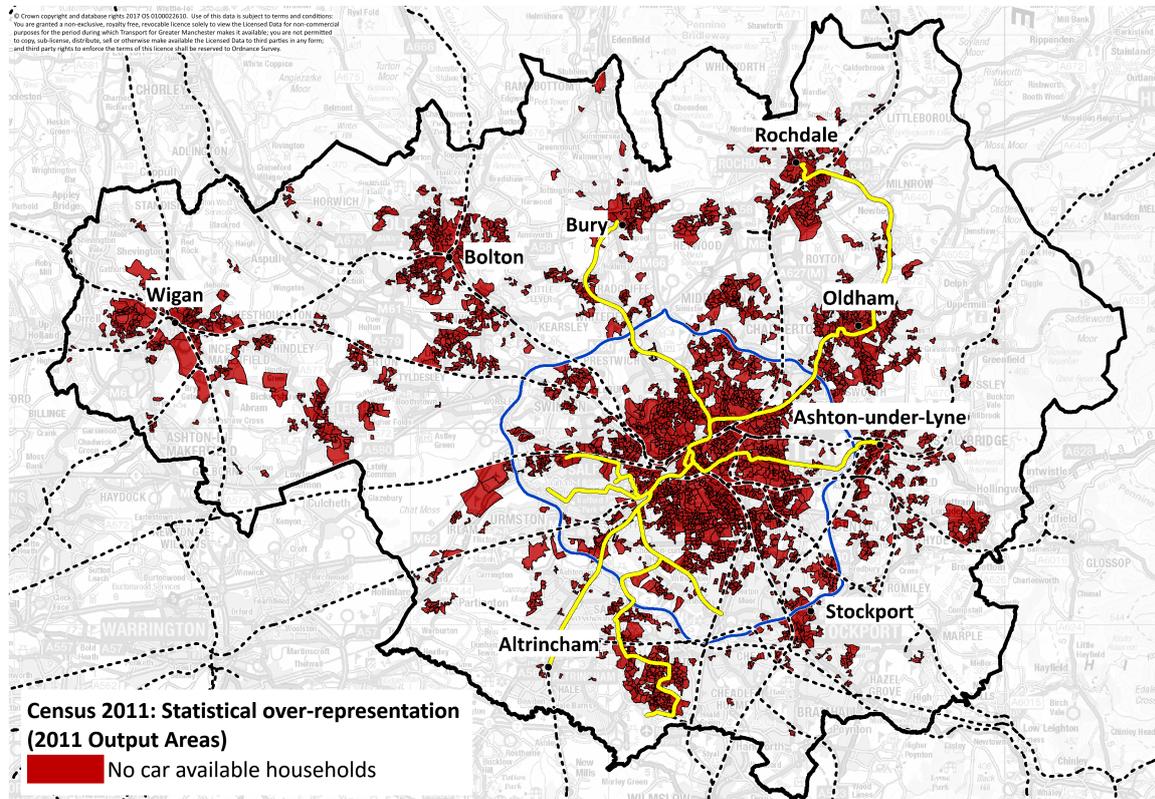
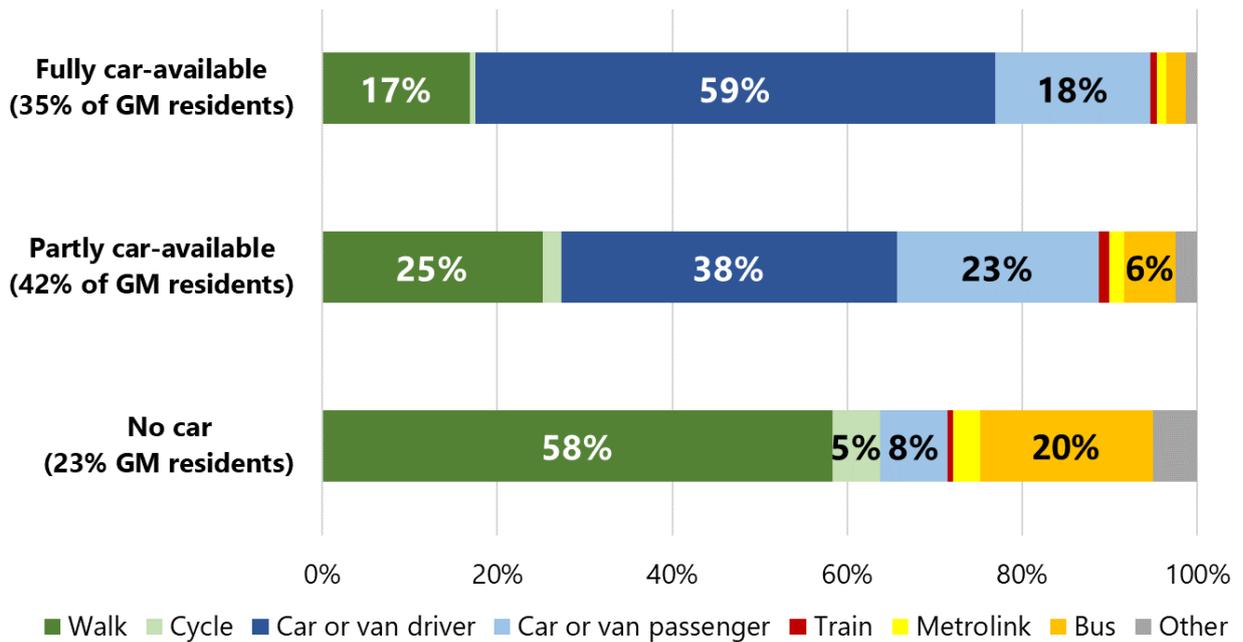


Figure 18 highlights the importance that personal car-keeping plays in influencing modal travel choice, and especially bus patronage. To increase both active travel and public transport patronage, the sustainable transport offer needs to appeal to households making decisions about personal car-keeping. As more options for easier, cheaper, sustainable, and active travel are created using the Bee Network, and shared mobility becomes a tangible option, many people's travel habits will change, although there is a need to be mindful that, due to the extent of personal car keeping within Greater Manchester already, this will take some time.

**Figure 18: Resident mode share by household car availability**



Source: GM TRADS 2017-19

### 3.4 Public transport accessibility and the concept of forced car ownership

Figure 19 shows how public transport in Greater Manchester is generally well targeted - where public transport is densest, the proportion of ‘Financially Stretched’ and ‘Urban Adversity’ residents is highest.

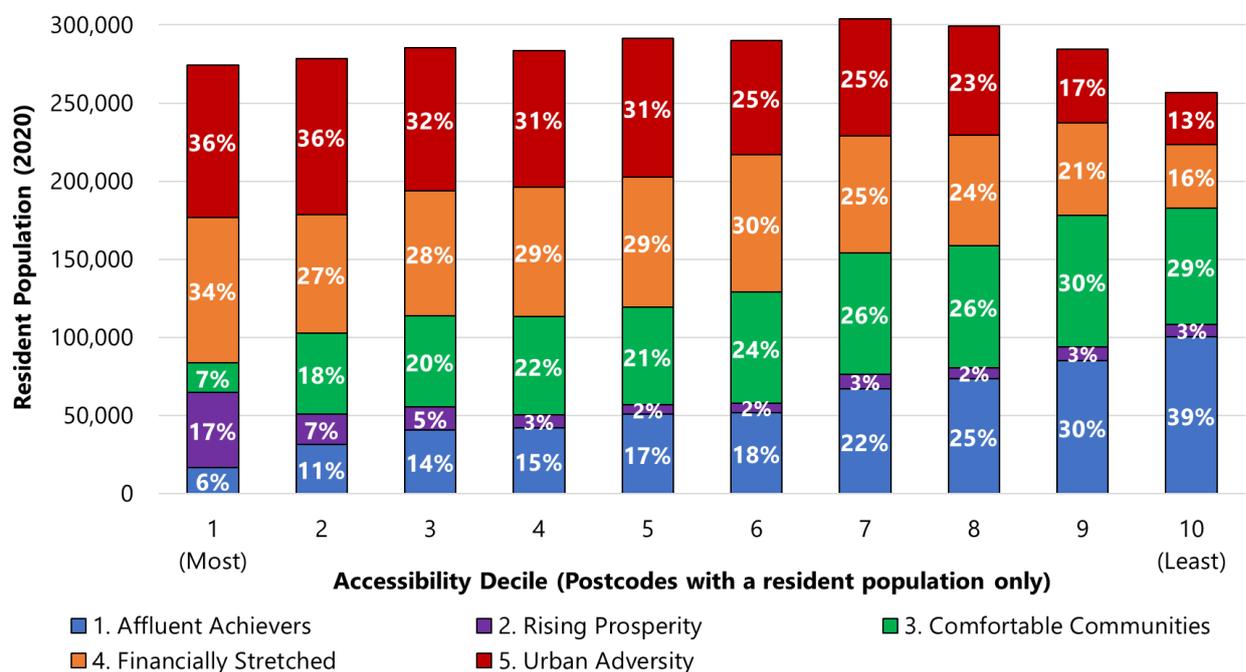
It is important to highlight that (as shown in Figure 19) c.180,000 (c.12%) ‘Financially Stretched’ and ‘Urban Adversity’ residents live in the bottom 20% public transport accessibility areas. It is locations such as this where the concept of ‘forced car ownership’ is particularly relevant – where communities who despite having low incomes and financial concerns (likely to be increasing amidst the on-going cost of living crisis), deem personal car keeping a necessity to access opportunities.

The interventionist approach set out in the 2040 Strategy<sup>12</sup> – of local government delivering better economic and social outcomes through an integrated transport

<sup>12</sup> TfGM (2019). The Greater Manchester Transport Strategy 2040. Available at: [Greater Manchester Transport Strategy | Transport for Greater Manchester \(tfgm.com\)](https://www.tfgm.com/transport-strategy)

network that can be tailored to meet contemporary travel patterns and which makes it easier to walk or cycle, and public transport is accessible and affordable - opens the way for a future where car ownership is not considered essential, wherever you live in Greater Manchester. There is a need to better understand what additional action public agencies, can provide to support modal shift from private car to active travel in locations where 'forced car ownership' is a problem.

**Figure 19: Acorn resident profile by Greater Manchester Accessibility Levels (June 2021) deciles (1=10% most accessible areas, 10=10% least accessible)**



Source: Acorn 2020 © CACI Limited. The applicable copyright notices can be found at <https://www.caci.co.uk/copyrightnotices.pdf>

# 4. Recent changes in contextual backdrop

## 4.1 Legacy of Covid-19 pandemic

The impact of the Covid-19 pandemic has been assessed in the context of the pathway to the Right Mix that is outlined in Appendix 1 of the Greater Manchester Transport Strategy 2040<sup>13</sup>. GM continues to monitor the situation to assess the extent to which the travel patterns of 2020/21 were just a short-term response to the conditions of the pandemic, or whether more significant long-term changes have taken root. Figure 20 summarises some of the ways in which the pathway may have been impacted.

There is some evidence to suggest that, in the short term at least, perceptions of public transport were negatively affected as a result of the pandemic. Worry about catching coronavirus in public spaces is decreasing but – although it has declined – worry about catching Covid-19 while on a bus remained the highest worry level (of all of the public spaces asked about) in spring 2022. People seemed prepared to continue personal Covid-19 related safety measures, such as avoiding crowded public transport, even after official guidance had ended. In March 2022, 39% of public transport users surveyed said that they will continue to avoid using crowded public transport.<sup>14</sup>

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<sup>13</sup> TfGM (2019). The Greater Manchester Transport Strategy 2040. Available at: [Greater Manchester Transport Strategy | Transport for Greater Manchester \(tfgm.com\)](#)

<sup>14</sup> TfGM (2022). TfGM Confidence Survey: Covid-19 recovery tracking survey. Details on request.

**Figure 20: Potential impacts of Covid-19 pandemic on the currently identified pathway to the 2040 Right Mix**

Positive aspects	Notes
Shorter trips - more trips to local facilities	Increase in home working (particularly relevant to those in professional occupations) promotes this trip redistribution.
Fewer trips?	Higher rates of digital interaction leading to fewer trips being made. There is some uncertainty however for example, working at home may create more opportunities for short local trips during the day. Also need to consider the impact of online delivery services.
Perception of cycling	Health benefits of cycling are being promoted to a greater extent (note that increased cycling is likely to see some shift from public transport however). For some there is a greater relative attraction to incorporating cycling into 'leisure' activities (noting how lockdowns temporarily reduced options available).
Negative aspects	Notes
Shift from public transport to car	Perception of public transport has been damaged for some. Services previously subject to overcrowding are likely to be viewed particularly negatively. An example is the intensification of the pre-Covid-19 trend for redistribution of retail trips from high streets to car-oriented retail parks.
Increased home working	Negative in the sense that it affects viability of public transport, which depends on high demand to provide attractive services. There are positive effects too - see above.
Town Centres attractiveness	Possible stalling of regeneration and entrenchment of deprivation (which is particularly concentrated on the Town Centres) impacting the attractiveness of the town centres.

## 4.2 Economic challenges in the short-term

At the time of writing, UK Consumer Prices Index inflation stood at a 40-year high of 10.1%, up from 2% in July 2021. It is widely accepted that inflation will increase to higher levels still during the remainder of 2022, with evidence already pointing to consumer demand being dampened (the UK consumer confidence index fell to its lowest level since 2008 in April 2022).

Greater Manchester is particularly vulnerable to the impacts of high inflation - noting its higher than average (vs.UK) proportion of residents who typically have below average disposable household incomes.

*“Lower income families are more exposed to the rising cost of living, and not just because poorer families have fewer opportunities to cut back spending. The poorest tenth of households (by income) spend three times as much as a share of expenditure on gas and electricity bills as the richest tenth. This means the lowest income tenth of people are facing an inflation rate at least 1.5 percentage points higher than the richest tenth. The Bank of England has warned the UK could see double-digit inflation later this year. Poorer households are already living with it.”* (Source: [Cap off - understanding the April 2022 inflation increase, Resolution Foundation](#))

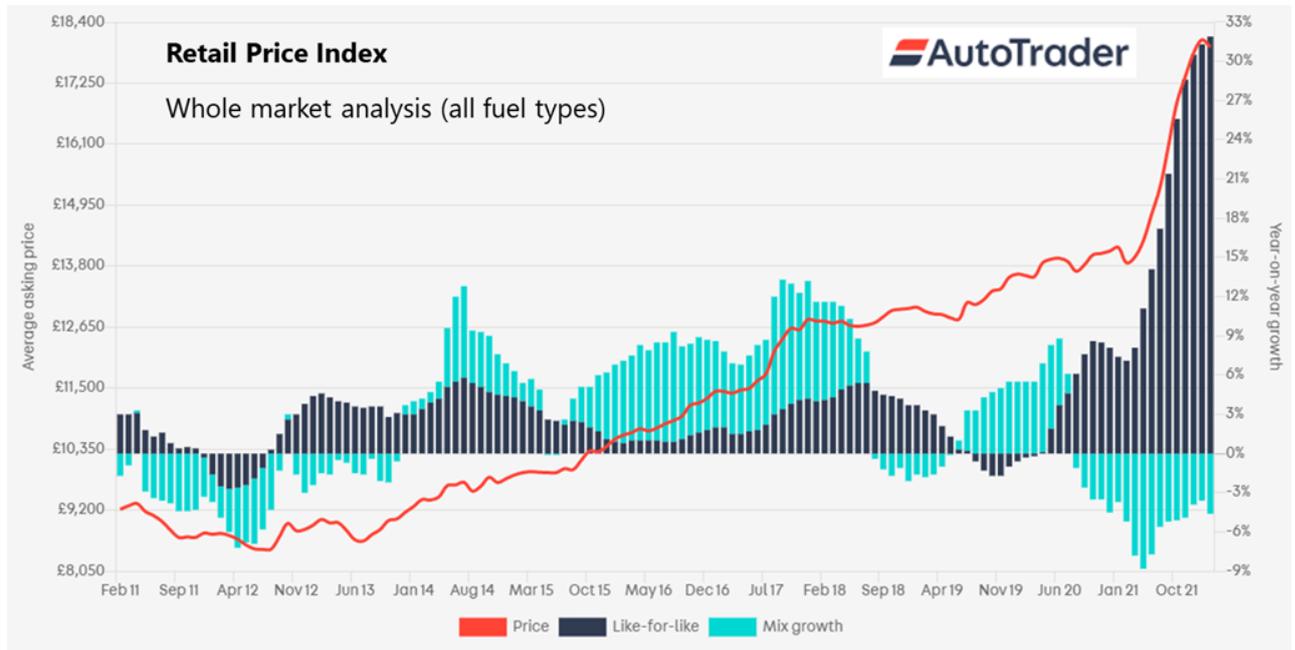
After a period of a record low base rate (0.1%) introduced at the onset of the pandemic, the Bank of England has been steadily increasing the base rate since the beginning of 2022 (at the time of writing the base rate stood at 2.25%). These increases will translate to increase the cost of borrowing for the majority of those who are not protected by fixed rates.

In summary, the short-term outlook for the economy is particularly challenging, and it can be expected that the demand for travel, for discretionary activities in particular, (linking to public transport revenue) will be impacted.

### **4.3 Changes to vehicle markets**

A recent change has been the increase in car prices as shown in Figure 21. As those who currently keep a personal car are exposed to new market conditions (a gradual process), there is an opportunity to influence their acquisition / disposal decisions - something which is likely to be most relevant for low-income households. As these changes continue to occur, there is a need to provide a viable alternative to car journeys in the form of an accessible, affordable and easy to use Bee Network.

**Figure 21: Used car retail price index**



Source: AutoTrader

# 5. Re-appraisal of key challenges

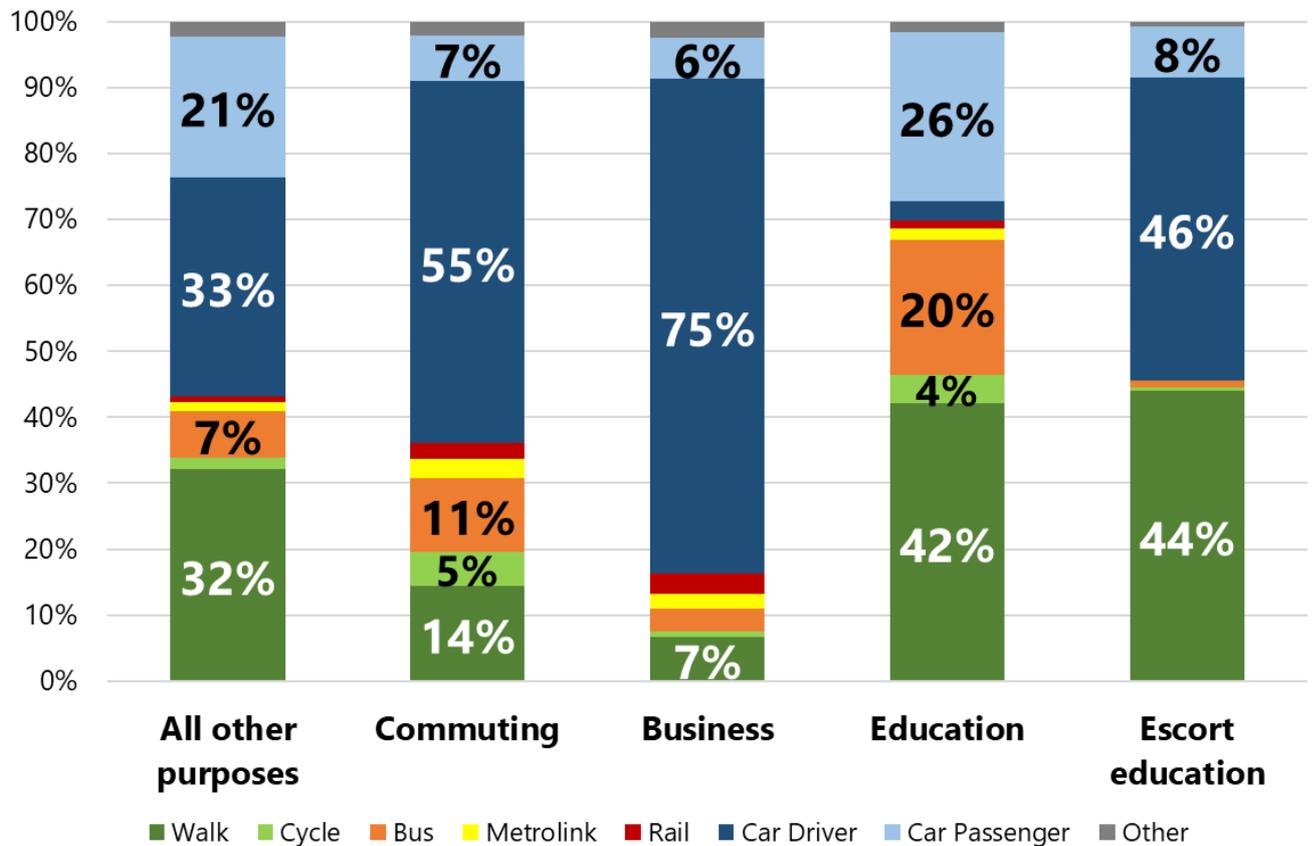
## 5.1 Access to employment, education, and training

Evidence presented in Section 2.3 points to the education public transport market being relatively stable. Figure 22 shows the need to consolidate GM's efforts in enhancing sustainable travel outcomes however, with nearly half of escort education trips being 'car driver' - pre-Covid this equated to c.200,000 daily trips, and Figure 7 (based on 2021 data) showed that escort education accounts for a larger proportion of car driver journeys that it did pre-Covid. The Our Pass scheme – which gives 16 to 18-year-olds free bus travel across Greater Manchester – forms part of GM's efforts to support young people accessing education and other training opportunities. It was introduced in 2019 as a pilot, which has been extended – something that will have supported post-Covid sustainable access to educational opportunities.

Section 2.3 showed that commuting and business proportionally accounted for less trips on public transport in 2021, than they did pre-Covid-19 - all amidst a backdrop of lower demand for public transport. Overall, this indicates a greater change in market conditions in comparison to the education market.

Figure 22 uses pre-Covid-19 data to show that over 60% of commuting trips were by car, with 16% by public transport (the majority of which were by bus). Business trips have a higher car mode share still at over 80%, which is a long way above the c.55% for all other purposes combined.

**Figure 22: Mode share by Greater Manchester residents: Commuting, business, education, escort education and all other purposes travel**

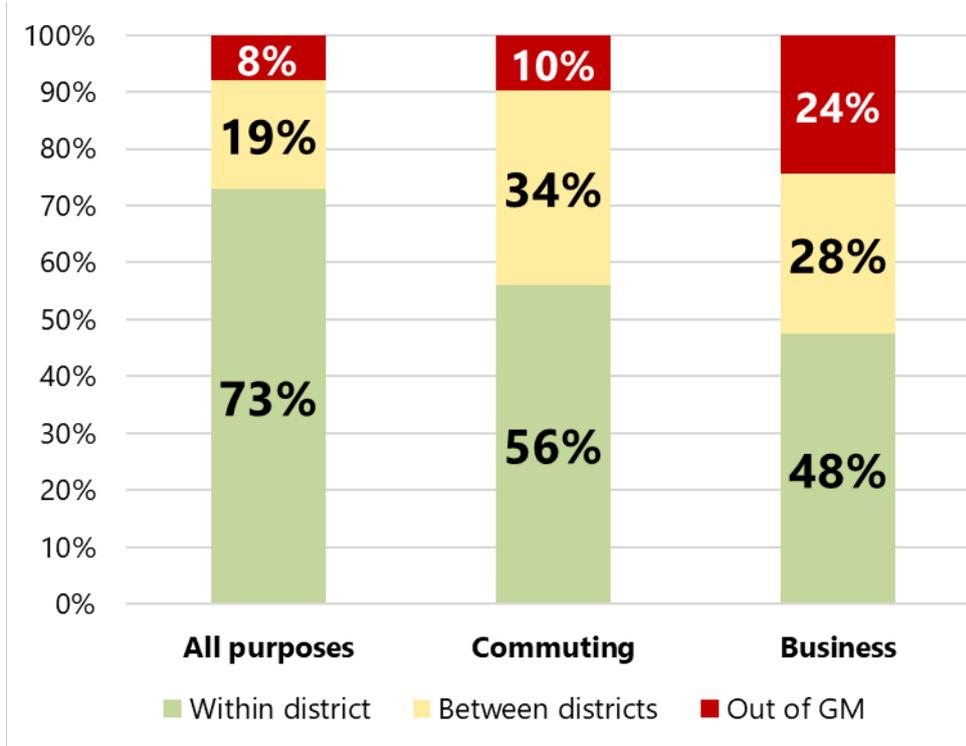


Source: GM TRADS 2017-19

Figures 23 and 24 use pre-Covid-19 data to indicate that the vast majority of trips by Greater Manchester residents take place entirely within the Greater Manchester boundary. Whilst the proportion of trips that have an end outside of Greater Manchester increases to 10% for daily commuting, and to 24% for business trips taken for work purposes (not including commuting) - there remains a major emphasis on local travel. This represents an opportunity for the Bee Network.

Figures 23 and 24 provide a detailed breakdown of how the pre-Covid c.1m trips per 'average day' commuting trips were distributed between Greater Manchester districts (with non- Greater Manchester at an aggregate level). The top table in Figure 24 show percentage values based on all commuting movements by Greater Manchester residents (this highlights the importance of Manchester), whilst the bottom table shows percentage values based on local authority of origin.

**Figure 23: Summary of trips by Greater Manchester residents: All purposes, commuting, and business travel (GM TRADS 2017-19)**



**Figure 24: Commuting by Greater Manchester residents**

		Destination											
Commuting		Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Non-GM	
Origin	Bolton	4.9%	0.6%	0.4%	0.1%	0.0%	0.4%	0.0%	0.1%	0.1%	0.6%	0.4%	
	Bury	0.6%	3.8%	1.0%	0.1%	0.4%	0.6%	0.1%	0.1%	0.2%	0.0%	0.3%	
	Manchester	0.4%	0.9%	16.9%	0.7%	0.8%	1.3%	1.7%	1.3%	1.9%	0.2%	0.7%	
	Oldham	0.1%	0.2%	0.7%	4.0%	0.6%	0.1%	0.1%	0.4%	0.1%	0.1%	0.2%	
	Rochdale	0.0%	0.4%	0.8%	0.6%	3.4%	0.1%	0.1%	0.2%	0.1%	0.0%	0.4%	
	Salford	0.4%	0.5%	1.4%	0.1%	0.1%	3.7%	0.2%	0.1%	0.5%	0.3%	0.3%	
	Stockport	0.1%	0.1%	1.7%	0.1%	0.1%	0.2%	3.9%	0.7%	0.5%	0.0%	0.6%	
	Tameside	0.1%	0.1%	1.3%	0.4%	0.2%	0.1%	0.7%	4.3%	0.1%	0.0%	0.4%	
	Trafford	0.1%	0.2%	2.0%	0.1%	0.1%	0.4%	0.5%	0.1%	5.0%	0.2%	0.4%	
	Wigan	0.6%	0.0%	0.3%	0.1%	0.0%	0.3%	0.0%	0.0%	0.2%	6.3%	1.1%	
	Non-GM	0.3%	0.3%	0.7%	0.2%	0.4%	0.3%	0.7%	0.4%	0.4%	1.0%	0.1%	100.0%

		Destination											
Commuting		Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Non-GM	
Origin	Bolton	64.6%	7.8%	5.6%	0.9%	0.6%	4.9%	0.4%	0.7%	1.3%	7.9%	5.3%	100.0%
	Bury	8.0%	52.1%	13.5%	1.8%	6.1%	8.0%	1.5%	1.6%	2.3%	0.5%	4.6%	100.0%
	Manchester	1.6%	3.4%	63.1%	2.7%	2.8%	4.7%	6.3%	4.9%	7.1%	0.9%	2.5%	100.0%
	Oldham	1.4%	2.9%	10.9%	61.5%	9.3%	1.4%	1.2%	6.1%	1.3%	0.8%	3.1%	100.0%
	Rochdale	0.7%	7.4%	13.6%	10.0%	55.2%	1.0%	0.8%	2.6%	1.7%	0.0%	7.0%	100.0%
	Salford	5.7%	6.7%	18.1%	1.2%	0.8%	48.9%	3.0%	1.0%	6.2%	4.0%	4.4%	100.0%
	Stockport	0.8%	1.2%	21.4%	1.0%	0.8%	2.9%	49.4%	8.4%	6.2%	0.0%	8.0%	100.0%
	Tameside	0.7%	1.1%	16.4%	5.5%	2.6%	1.2%	8.7%	56.8%	1.7%	0.2%	5.0%	100.0%
	Trafford	0.9%	1.8%	21.7%	1.1%	0.9%	4.8%	5.3%	1.1%	55.2%	2.4%	4.8%	100.0%
	Wigan	6.6%	0.4%	3.1%	0.6%	0.0%	3.7%	0.0%	0.2%	2.4%	70.8%	12.2%	100.0%
	Non-GM	6.1%	6.8%	15.4%	4.2%	8.0%	6.0%	14.5%	7.8%	9.0%	21.1%	1.1%	100.0%

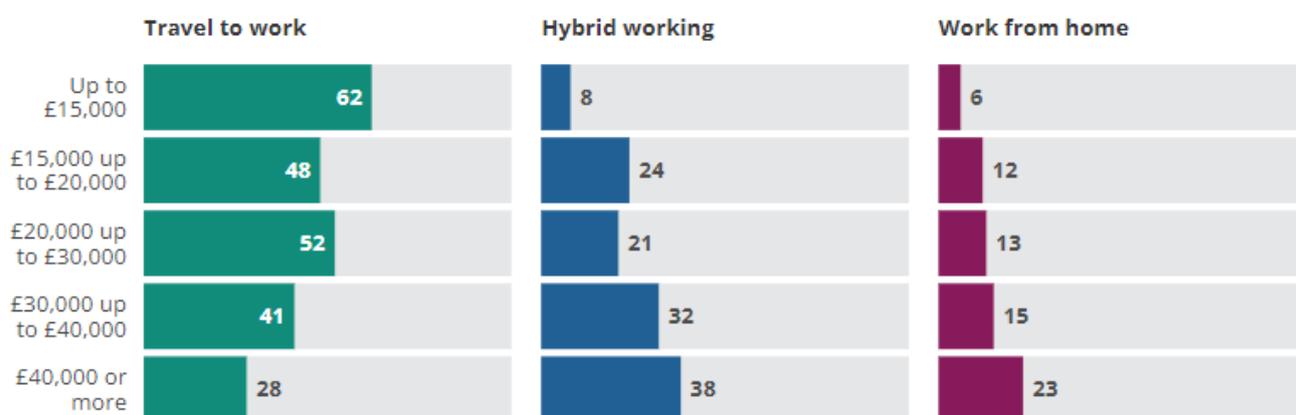
Source: GM TRADS 2017-19

A long-term change from the pandemic has been increased uptake of digital interaction and working from home - something that has the potential to place further emphasis still on 'stay local'. As homeworking is not available to all, however, it is important to understand both its scale and the type of residents it is applicable to.

ONS reported that across Great Britain in spring 2022 (when guidance to work from home because of the pandemic was no longer in place), 38% of working adults reported having worked from home at some point over the last seven days.

Rail based public transport is likely to be particularly vulnerable to reduced commuting frequencies in Greater Manchester due its stronger pre-Covid association with more affluent residents, which figure 25 illustrates are more likely to work from home, and least likely to travel to work.

**Figure 25: Working arrangements by income (% of workers), Great Britain, 27<sup>th</sup> April to 8<sup>th</sup> May (ONS: Opinions and Lifestyle Survey)**



Source: ONS Opinions and Lifestyle Survey

The high car driver mode shares for commuting and business trips reported in Figure 22 point to obvious benefits where such trips are replaced through digital solutions. However, there is likely more complexity than this, with trip redistribution and the concept of fixed travel time budgets leading to a need for on-going monitoring, the results of which may lead to GM's vision-led adaptive planning process identifying a need for policy changes.

From a public transport patronage perspective, it is encouraging to see that a large proportion of workers are travelling to work post-Covid, particularly those on lower incomes - which Figure 19 showed have a greater tendency to reside in areas with greater public transport density.

## 5.2 Healthy travel

In Greater Manchester, over 1 in 3 adults are not physically active enough to maintain good health<sup>15</sup>. This is a key driver for our ambition to develop a transport system that supports people in leading active, healthy lives.

Obesity harms people's prospects in life, their self-esteem, and their underlying mental health. Research published in the British Medical Journal found that people who are obese or overweight are less likely to exercise in public as they feel discriminated against because of their weight<sup>16</sup>. More broadly, obesity has a serious impact on economic development.

The UK-wide NHS costs attributable to overweight and obesity have previously been projected to reach £9.7 billion by 2050, with wider costs to society estimated to reach £49.9 billion per year<sup>17</sup>, but more recent analysis suggests that wider costs may already be higher at £58 billion<sup>18</sup>.

One contributing factor is the significant indirect costs due to the higher levels of sickness and absence from work that obese people suffer, reducing productivity and imposing costs on business.

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<sup>15</sup> GM Moving (2021). Greater Manchester Moving in Action 2021-31. Available at: [Appendix 1 GM Moving In Action Strategy 2.pdf \(greatermanchester-ca.gov.uk\)](#)

<sup>16</sup> Jackson SE, Steptoe A (2017) Association between perceived weight discrimination and physical activity: a population-based study among English middle-aged and older adults. Available at: [Association between perceived weight discrimination and physical activity: a population-based study among English middle-aged and older adults | BMJ Open](#)

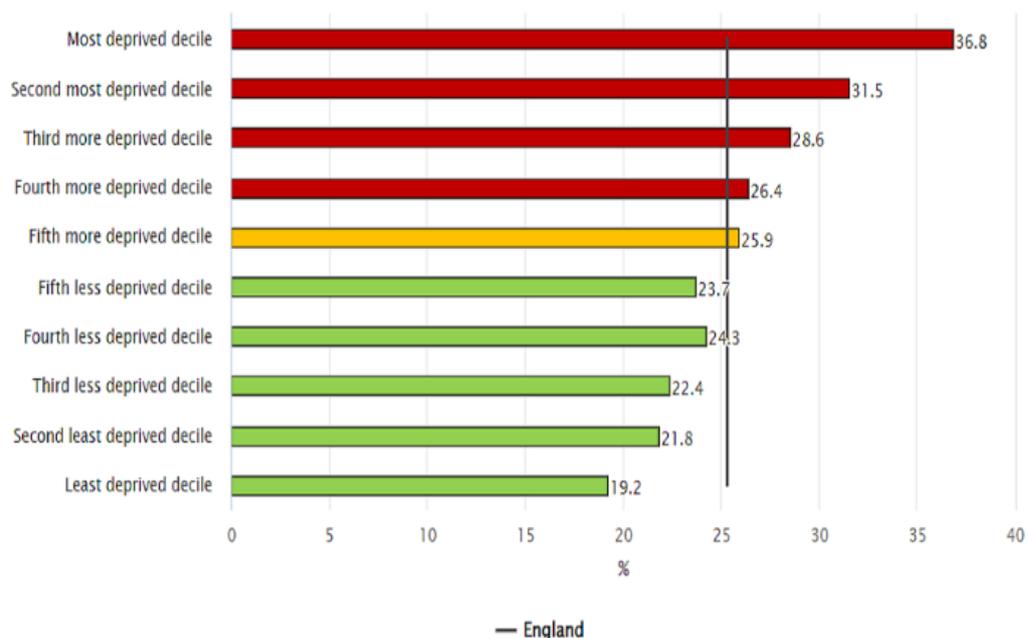
<sup>17</sup> Public Health England (2017). Health matters.

<sup>18</sup> Frontier Economics (2022). Estimating the full cost of obesity in the UK

Figure 26 shows that there are clear disparities in the prevalence of obesity with higher prevalence in areas of greater deprivation - something that Section 3.2 demonstrated Greater Manchester faces a particular challenge with.

TfGM and the University of Manchester are working with Tackling Root Causes Upstream of Unhealthy Urban Development (TRUUD) consortium researchers to develop our Streets for All approach in a way which will help to improve health outcomes by developing health metrics and mapping street typologies against health and socio-economic data.

**Figure 26: Percentage of adults (aged 18+) classified as obese by deprivation decile, England, 2020 to 2021 (Obesity Profile, July 2022, OHID)**



## 5.3 Carbon

The Greater Manchester Strategy<sup>19</sup> sets out a future for Greater Manchester as a place where people live healthy lives, and a place that is at the forefront of action on climate change with clean air and a flourishing natural environment.

Building on this, the 5-Year Environment Plan<sup>20</sup> for Greater Manchester set an ambitious target to be carbon neutral by 2038, and a vision for Greater Manchester to be a clean, green, carbon-neutral resilient city region, with a thriving natural environment and zero waste economy. Although these targets are in the future, action must be taken now if we are to make them a reality.

In this context, decarbonising transport is a particularly high priority, given that it contributes over one third of all of Greater Manchester's carbon emissions, with an estimated footprint for transport of 4MtCO<sub>2</sub> per annum in 2020<sup>21</sup>.

As acknowledged by the Department for Transport's Transport Decarbonisation Plan<sup>22</sup>, there is no single action that will solve the transport carbon challenge, and the public sector, businesses and citizens will all need to take co-ordinated action across three main areas:

**Avoid** – reducing the need for unnecessary travel and the distances travelled (particularly by private vehicles) through digital connectivity (e.g. home working) and delivering services and activities closer to where people live (for example as set out in the draft Places for Everyone Plan<sup>23</sup>, which has a major focus on directing growth to locations within existing urban areas and around public transports hubs);

**Shift** – supporting a rapid mode shift to more sustainable modes of transport (alongside a re-distribution of trip origins and destinations), including active travel,

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<sup>19</sup> GMCA (2021). The Greater Manchester Strategy 2021-2031. Available at: [About Greater Manchester](#)

<sup>20</sup> GMCA (2019). The 5-Year Environment Plan. Available at: [Five-Year Environment Plan - Greater Manchester Combined Authority \(greatermanchester-ca.gov.uk\)](#)

<sup>21</sup> BEIS (2022). Analysis of Local Authority Emissions Estimates.

<sup>22</sup> Department for Transport (2021). Transport Decarbonisation Plan. Available at: [Transport decarbonisation plan - GOV.UK \(www.gov.uk\)](#)

<sup>23</sup> GMCA (2021) Places for Everyone Joint Development Plan Document – Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford, Wigan Publication Stage. Available at: [Places for Everyone \(greatermanchester-ca.gov.uk\)](#)

public transport and shared transport (this is a major focus of the Right-Mix targets and the establishment of the Greater Manchester “Bee Network” including reallocation of road-space towards sustainable modes); and

**Improve** – decarbonising the transport fleet – with a particular focus on buses, cars, commercial vehicles and public sector fleet.

It is also very important that the transition to a decarbonised transport system does not exclude those in society who are least able to respond and who, in any case, contribute much less to the carbon problem due to their lower levels of mobility and car use.

There therefore appears to be a huge opportunity to tackle carbon whilst also tackling inequalities and helping to boost productivity, pay, jobs and living standards in the poorest communities in Greater Manchester. This is why delivering a fully inclusive Bee Network is a core component of GM’s decarbonisation plans; as is the focus on delivering new development in locations well served by sustainable transport. GM also has a programme of investment which is directly targeting decarbonisation of the transport system, through investment in Electric Vehicle (EV) Charging Infrastructure and in EV buses and supporting depot charging infrastructure, and through delivery of GM’s first operationally carbon neutral interchange at Bury.

There will be multiple benefits of a carbon neutral transport system e.g. new highly skilled employment opportunities associated with scaling up technological solutions, as well as a range of wider health and wellbeing benefits.

Tackling transport related carbon emissions will also require leadership and further coordinated policy support from national government to help create an environment within which we can design and implement measures that help the approach to “avoid, shift and improve transport” in the short timescales GM’s carbon obligations require.

## **5.4 Cost of travel and congestion**

Figure 27 shows how in recent years the relative costs of bus and rail travel have been working against traffic reduction e.g. reducing fuel duty in real terms, and increasing rail and bus fares in real terms.

**Figure 27: Transport Price Index (RAC – Cost of Transport Index)**

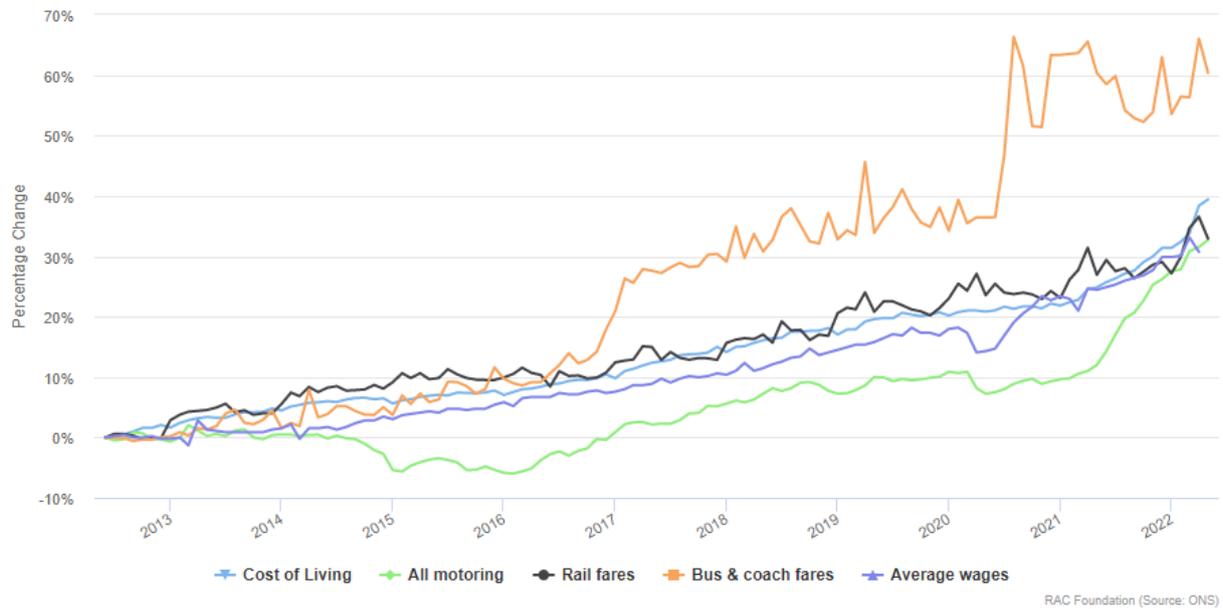
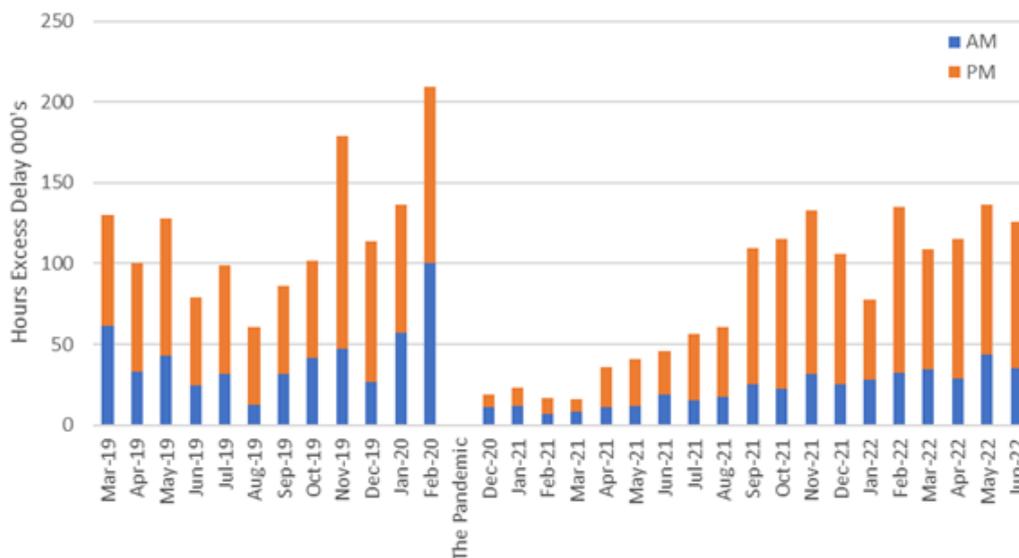


Figure 28 sets out hours of excess delay on monitored corridors and shows that in terms of delays, the overall profile is broadly comparable to pre-pandemic, but there are some differences.

- A higher proportion of delay now during the PM peak period.
- There has not been a repeat of delay levels akin to those experienced in November 2019 and February 2020. This may be because with less pressure on the network during the peaks there is more resilience.

**Figure 28: Hours of excess delay on monitored corridors**



Source: TfGM Highways Department analysis

## 5.5 Transport sector skills shortage

There has been a skills shortage across the transport sector for several years, which has been compounded by the pandemic and changes in the economic forecast over recent years.

Freight industries have been particularly impacted by the pandemic. Driver numbers have fallen significantly and, with 96% of hauliers indicating they have had problems recruiting drivers and 24% experiencing severe difficulties in securing associated staff (such as transport managers and mechanics)<sup>24</sup>.

The impact of this skills shortage across the logistics sector has led to less resilience in supply chains with this impacting the wider economy - for example tanker driver shortages in late 2021 led to fuel shortages.

While logistics driver shortages stabilised going into the summer of 2022, many qualified drivers have moved into logistics from other industries. This has impacted public transport – a lack of drivers has sometimes impacted bus services, for example.

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<sup>24</sup> Logistics UK (2021). Survey.

## 6. Recommendations

The Bee Network represents the renaissance of public transport and active travel here in Greater Manchester. GM's interventionist approach provides vital economic tools needed to emerge stronger from our current struggle, and to enable a healthier economy and society in the longer term, but GM is at a critical moment where government must continue to provide support.

GM must **carry on delivering the Bee Network, at pace**, to address the longstanding challenges set out in the 2040 Strategy and this paper; boost productivity, pay, jobs and living standards in the towns and cities of Greater Manchester and significantly cut our carbon emissions.

GM should **continue to re-appraise Greater Manchester's key economic, environmental and health challenges** in light of the legacy of Covid-19 and the cost of living crisis. Beyond the pandemic's immediate impact, we are beginning to observe that these disruptions are continuing to have an impact on travel patterns and transport in Greater Manchester. Travel for work and pleasure has slowed, ticket revenues have reduced accordingly, and the concentration of activity in the Regional Centre has declined. Meanwhile, jobs located outside the Regional Centre are more likely to be low paid and insecure, whilst for many Greater Manchester residents, 'staying local' for work, education or training is not feasible.

A key area of focus must be how GM **increases the appeal of public transport to a wider market** as it delivers the Bee Network (to respond to challenges such as forced car ownership, for example) helping to redress some of Greater Manchester's economic imbalances through sustainable connectivity. Public transport and active travel have huge potential to provide businesses and communities with the supply of labour, skills, and jobs that they both need to unlock their full potential.

One of the ways in which Greater Manchester is already increasing the appeal of public transport is through the Our Pass scheme, which gives 16 to 18 year olds free bus travel across Greater Manchester. In addition to encouraging people to access opportunities by public transport from a young age, GM's overall focus on delivering the Bee Network will enable it to expand labour and skills supplies (as well as enhance access other key services and amenities), without increasing congestion, at

low or zero carbon costs and will also help to improve public health (including through increased walking and cycling) across Greater Manchester's population.

In turn, additional ticket revenues will be invested back into the franchised bus and broader public transport system to sustain its operation and ideally extend its reach.

In 2021, the decision was taken to run buses in Greater Manchester under a franchising system, coordinated by the GMCA. This will enable GMCA to develop an integrated, multimodal public transport network that can meet the demands of both passengers and the city-region's economy. An adult bus fare price cap at £2.00 a journey or £5.00 a day from September 2022 will be a key component of transforming the bus network and helping to off-set the cost of living. We need to **deliver bus franchising** as a key part of the Bee Network as this change will further help link deprived communities to amenities, services, and job opportunities across the region and help keep people moving to support the economy.

Delivering the Bee Network ambitions and achieving the 'right mix' target will make an extremely important contribution to GM's carbon reduction ambitions, but, on their own, will not be sufficient to meet its carbon commitments. To meet the scale and pace of reductions required, UK city regions like Greater Manchester need to be part of a much more co-ordinated national approach to reduce the need to travel, shift travel onto more sustainable modes of transport, and to rapidly decarbonise vehicle fleets.

Given the scale of the carbon challenge and the commitment in the Streets for All Strategy<sup>25</sup> to develop a road traffic reduction plan for Greater Manchester, it may now be necessary to move from a position of aiming for net zero traffic growth through to 2040 to one where GM **identifies targets for model shift that could support traffic reduction over time in Greater Manchester**. Further work is required to establish the scale of modal shift and what potential for traffic reduction could be appropriate and credible in this regard. GM will continue to engage proactively with central Government on this critical issue.

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<sup>25</sup> TfGM (2021). Streets for All Strategy. Available at: [TfGM Streets for All](#)

In the long term, delivering the integrated transport network described in this paper is the best way for Greater Manchester to grow patronage and revenue. Covid-19 led to immediate reductions in both, and passenger numbers are still not at pre-pandemic levels. At the time of writing, 'emergency' funding - such as the Bus Recovery Grant - is set to end. City Region Sustainable Transport Settlement and Bus Service Improvement Plan funding have been agreed for Greater Manchester, but more funding support from central government is needed, to enable GM to stay on track to unlock the benefits of the 'virtuous circle' set out in this report and, in more detail, in the 2040 Strategy.

# Annex

## Spatial theme technical definitions

<b>Spatial Theme</b>	<b>Includes</b>	<b>Except</b>
<b>Neighbourhood</b>	Trips less than 2km (straight line) with at least one end within Greater Manchester.	<ul style="list-style-type: none"> <li>• Trips with a non-work attraction end at Manchester Airport and surrounding developments</li> <li>• Trips with an end in either the Regional Centre or a town centre.</li> </ul>
<b>Town Centres</b>	Trips with at least one end in a town centre, and neither end more than 10km outside the Greater Manchester boundary.	<ul style="list-style-type: none"> <li>• Trips with a non-work attraction end at Manchester Airport and surrounding developments</li> </ul>
<b>Wider City Region</b>	Trips with at least one end in Greater Manchester, and both ends no more than 10km outside the Greater Manchester boundary	<ul style="list-style-type: none"> <li>• Trips with a non-work attraction end at Manchester Airport and surrounding developments</li> <li>• Trips with an end in either the Regional Centre or a town centre.</li> <li>• Trips under 2km</li> </ul>
<b>Regional Centre</b>	Trips with an end in the Regional Centre.	<ul style="list-style-type: none"> <li>• Trips with a non-work attraction end at Manchester Airport and surrounding developments</li> <li>• Trips with an end either in a town centre or more than 10km outside the Greater Manchester boundary</li> </ul>
<b>City-to-City</b>	Trips with one end in Greater Manchester, and the other more than 10km outside the Greater Manchester boundary.	<ul style="list-style-type: none"> <li>• Trips with a non-work attraction end at Manchester Airport and surrounding developments</li> </ul>