Transport for Greater Manchester

Greater Manchester Transport Strategy 2050

Population and Economy Evidence Report

Consultation Draft

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Executive Summary

Our Right Mix target is fundamental to delivering the Greater Manchester (GM) vision for a thriving city region where everyone can live a good life.

This document provides insights to population and economy trends and their implications for achieving the 2040 Right Mix Vision – a target for at least 50% of all journeys to be made by active travel (walking, wheeling or cycling), or public transport, without increasing overall motor vehicle traffic.

It integrates demographic, socioeconomic, spatial, and behavioural data, with an illustrative pathway to the 2040 Right Mix Vision to inform adaptive transport planning. Some of the key findings are as follows:

Travel behaviour

- Car use is dominant, with around 60% of trips made by car and 76% of distance travelled in 2023 - as was the case during the period 2016-2018.
- Active travel accounts for about one-third of trips; public transport use has not yet returned to pre-pandemic levels.
- Walking has increased between 2017 and 2023 for Neighbourhood trips, but car keeping per head has also risen over this period, with growth strongest in areas that previously had low car keeping per head.

Population growth and distribution

- GM's resident population grew rapidly (+16%) between 2001 and 2021, and it now exceeds 2.9m
- Recent growth has been concentrated in Manchester and Salford, areas with higher public transport and active travel usage.
- The population is ageing, with a significant increase in residents aged 65+, and becoming more ethnically diverse (24% ethnic minority in 2021, up from less than 10% in 2001).

Health and inequality

- Around 40% of GM residents live in areas among the 20% most deprived in England.
- Physical inactivity and obesity are widespread, with 2 in 3 adults overweight and 25% physically inactive in 2022/23
- Transport-related social exclusion affects around 420,000 residents, particularly in areas with poor public transport access.

Economic trends

- There is a distinct north to south divide in GM, with the ratio of residents per job lowest in Manchester (1.3), Trafford (1.4), and Salford (1.7) - local authority areas that intersect the Regional Centre. Those living in the north of GM face greater competition to access employment opportunities within the local authority areas in which they reside (ratios of residents per job are 2.6 or higher)
- Employment is increasingly concentrated in the Regional Centre, which supports higher public transport use.
- Manchester and Salford (the local authority areas that capture the vast majority of the Regional Centre) have accounted for an increasing proportion of GM GVA over the period from 1998 (36%) to 2022 (46%).
- In 2023, over a third of jobs were in IT, financial, real estate, professional, and admin roles - representing over 120,000 more jobs than there were in 2015. This translated to 31% growth in these industry sectors, which was well above the overall growth of 17% across all industries.
- Working from home has become more prevalent, especially among higher-income and professional workers, altering commuting patterns.
- Retail trends show a shift toward car-dependent retail parks, reducing the viability of sustainable transport for shopping trips.

Implications for Right Mix Vision and next steps

- Key challenges are increased levels of car keeping, uneven public transport access, perceptions of reliability and safety on the Bee Network, and health related barriers to increasing active travel.
- Achieving the Right Mix Vision requires transformational change and targeted interventions that support low-car lifestyles, especially in high-growth and high-density areas. It will require a substantial increase in the level of investment to provide transport services and a joined-up approach that recognises the important influence that decisions and action outside of the transport sector can have on travel outcomes.
- We will need to continue to lobby for action on issues that are not directly within our control, or where our own direct intervention could distort local investment decisions in ways that would disproportionately adversely impact opportunities for our residents.
- Adaptive planning and monitoring are critical to respond to evolving trends, including homeworking, retail shifts, demographic and technology changes.

1. Introduction

1.1 Our Vision

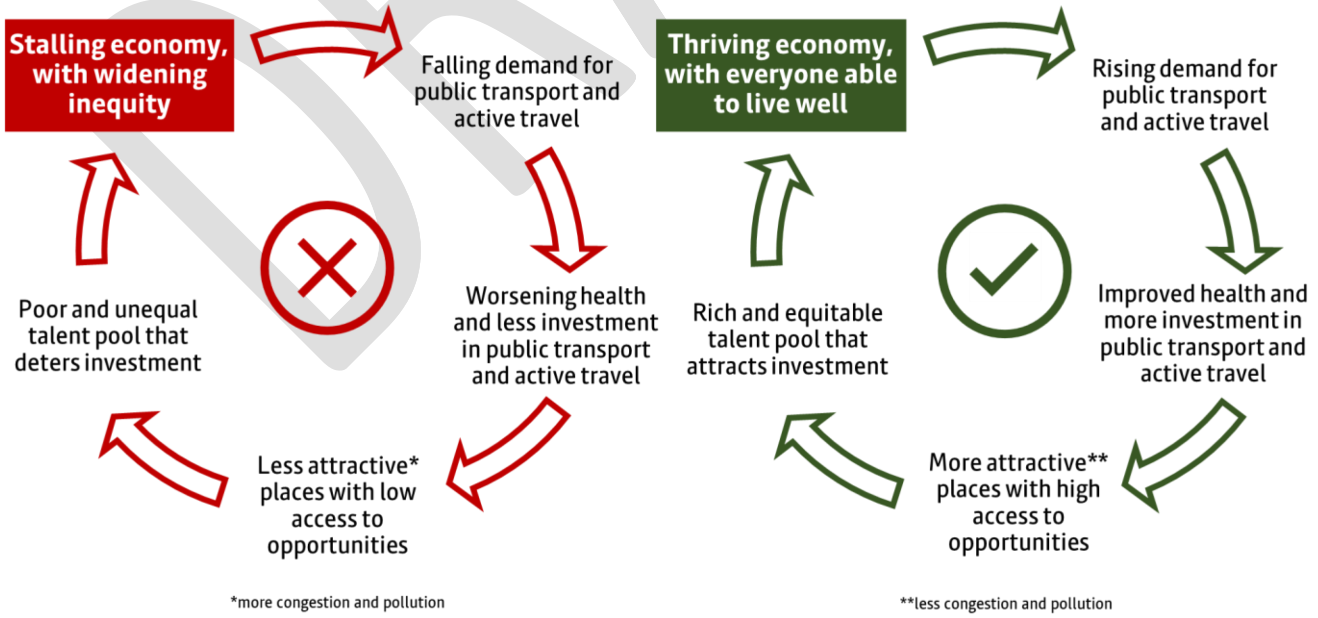
We want Greater Manchester (GM) to be a thriving city region where everyone can live a good life. This is the vision statement from the overarching Greater Manchester Strategy. Our Local Transport Plan sets out the role that transport will play in enabling this.

Economic success, particularly in the Regional Centre and southern parts of GM, has not yet spread to all areas, and there are significant pockets of severe deprivation throughout the city-region. We must tackle this inequity while confronting the major challenges we face from congestion, air pollution, physical inactivity, road safety, and the need to decarbonise.

Figure 1 shows that to deliver a thriving city region we need to help more of our residents' travel by public transport and active travel. A successful and financially sustainable Bee Network will drive growth in GM by improving accessibility, increasing productivity, and attracting investment.

Figure 1 also shows an alternate cycle, in which an over-reliance on private cars to access opportunities, leads to deteriorating public health outcomes, less investment in public transport and active travel, and stalling of the local economy and widening inequity.

Figure 1: The role of travel in delivering our Vision - illustrative cycles



1.2 Purpose of document

This document is part of a broader evidence base, which has supported the development of our Local Transport Plan. Building consensus and awareness of our evidence base will promote decision making that supports our long-term vision.

In this document, evidence is reviewed against two principal drivers of travel demand:

1. **Our resident population**: it's people that make trips; and
2. **GM economic activity**: a reason for and an enabler of people making trips.

1.3 Approach to presenting evidence

We have deliberately tried to avoid presenting isolated facts and figures. Instead, we have sought to present findings against a wider context. This helps us to arrive at actionable insights, which can be used to help us adapt our plans to give us a better chance of delivering successful outcomes.

Evidence that relates to the principal drivers will be reviewed with a view to identifying the following types of findings:

1. **trends and projections** - including identification of any recent changes; and
2. **notable differences between people and places** - which could link to specific geographies (in support of placemaking), time periods, types of trips etc.

These findings will be presented against the contextual backdrop of our ambition to deliver the **2040 Right Mix target** that is set out in the GM Transport Strategy 2040 - our Local Transport Plan (LTP). **Achieving the 2040 Right Mix target is fundamental to delivering the overarching vision of making GM a thriving city region where everyone can live a good life.**

In simple terms, we want to make it clear why findings matter, and how we might wish to adapt our plans in response to newly acquired insight.

1.4 Updated Right Mix target

The headlines of the updated 2040 Right Mix target are as follows:

1. By 2040 **we want at least 50% of all journeys in GM to be made by active travel and public transport (50:50 target)**.
2. We **estimate this will mean over one million more sustainable journeys every day** enabling us to deliver a healthier, greener and more productive city-region.

3. **Achieving this vision will enable us to deliver our economic growth ambitions without increasing overall motor vehicle traffic in GM.** For private motor vehicle travel by both GM and non-GM residents - we anticipate this will mean a reduction in distance travelled in the range of 5-10%.

We have set out a revised pathway to the 2040 Right Mix target which is summarised in Figure 2 alongside a high-level assessment of the 2023 status / recent trends, which is intended to indicate whether or not we are building positive momentum in respect of each element of the pathway. We recognise from the outset that the pathway will be adapted in response to monitoring.

The nature of both what has already happened, and what will happen in the future to the resident population and the economic activity within GM, can be expected to influence all aspects of the proposed pathway in some form.

As an example, the extent to which resident population and economic growth have / will be concentrated in the Regional Centre, will influence the scope for increasing the walking and cycling mode shares of Regional Centre trips. It will also influence the scope for increasing the proportion of trips that are Regional Centre vs. Wider City Region.

By improving our understanding of influences (**this includes both the impact of external factors and influences under our direct control**) on the proposed pathway to the 2040 Right Mix target, we are better placed to design interventions that work with existing trends and maximise the return on investment. We are also better able to articulate what national government support is required.

Figure 2: Summary of proposed pathway to 2040 Right Mix target (2023 baseline)

		Summary of change	Target contribution[1]		2023 Status
			50:50	Car KMs[2]	
1		6% population growth leads to 6% growth in trips (and distance travelled) by all modes[3]	**40%** None	**+6%** Increase	Growth occurring
2		5% of Wider City Region trips redistributed to Neighbourhood (taking on their characteristics)	**41%** (+1 pp)	**+3%** (-3 pp)	Some positive changes
3		10% of Wider City Region trips redistributed to Regional Centre (with no increase in car travel)	**44%** (+3 pp)	**-2%** (-5 pp)	No evidence to date
4		Town Centres double their resident population leading to changes in Town Centre trips	**45%** (+1 pp)	**-2.5%** (-0.5 pp)	Too early to assess
5		Rapid transit modes account for 6% of Wider City Region trips	**46%** (+1 pp)	**-4.5%** (-2 pp)	No evidence to date
6		Walking becomes more attractive for Neighbourhood and Regional Centre trips	**47%** (+1 pp)	**-5%** (-0.5 pp)	Some positive changes
7		Cycle share increases for Neighbourhood, Regional Centre, and Wider City Region	**49%** (+2 pp)	**-6%** (-1 pp)	Some positive changes
8		Bus becomes more attractive as it is better able to respond to local needs	**50%** (+1 pp)	**-7%** (-1 pp)	Some positive changes
9		City to City car mode share reduces as public transport becomes more attractive	**50%** (+0.5 pp)	**-9%** (-2 pp)	No evidence to date

Note: Target contribution values are rounded and therefore subject to rounding error.

[1] the pathway is set out as a series of 'steps' for analytical and presentational purposes only.
[2] 'Car KMs' refers to estimates of private motor vehicle kilometers travelled by both GM residents and non-GM residents but does not include freight. We expect no net increase in motor vehicle traffic to be achieved by a net reduction in residents' traffic; alongside an increase in light goods vehicle movements.
[3] This pathway was produced prior to ONS releasing 2022-based subnational populations projections on 24 June 2025. We will update the pathway in the final version of this document but anticipate that the consultation version will maintain the above pathway that uses 2018-based population projections.

2. Progress towards the 2040 Right Mix target

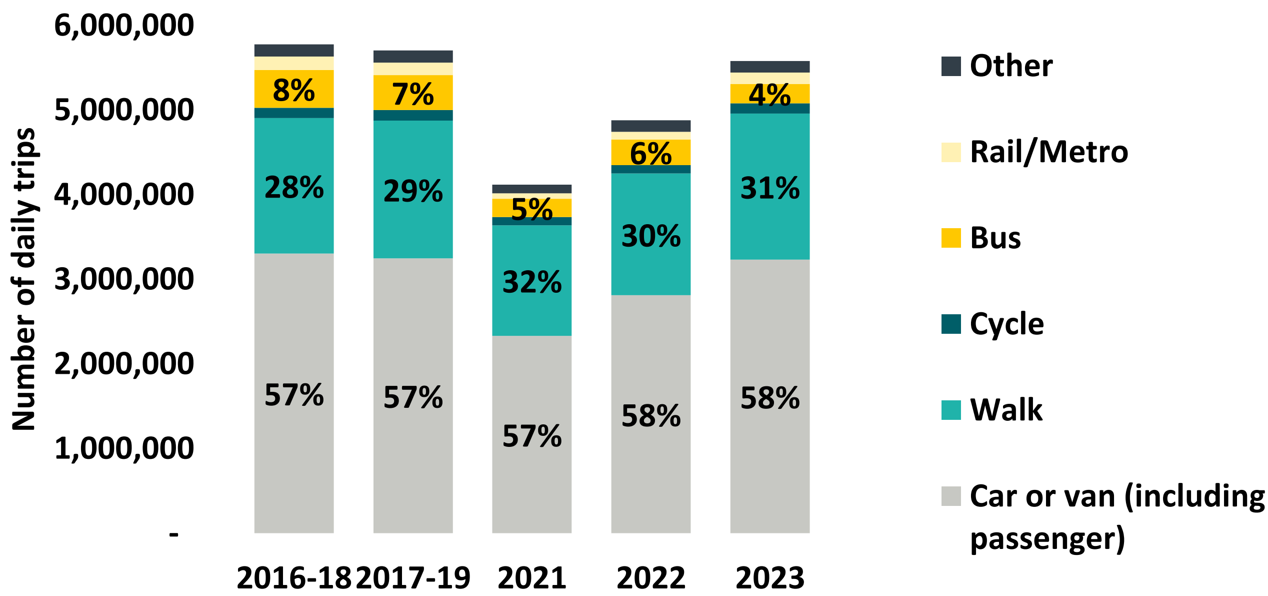
2.1 What does our time series data on GM resident travel behaviour tell us?

Section 1.4 set out that by 2040 **we want at least 50% of all journeys in GM to be made by active travel and public transport**.

In this section we use our multi-year time series data for GM residents only (obtained from our Travel Diary Survey) as a guide for the progress that is being made towards the 2040 Right Mix target.

While the overall number of trips by GM residents for each method of travel has fluctuated since the start of the pandemic the mode share has remained relatively stable with car trips making up nearly three-in-five trips, active travel making up around a third of trips, and very broadly one in ten trips using public transport.

Figure 3: Daily trip count and mode share - GM residents



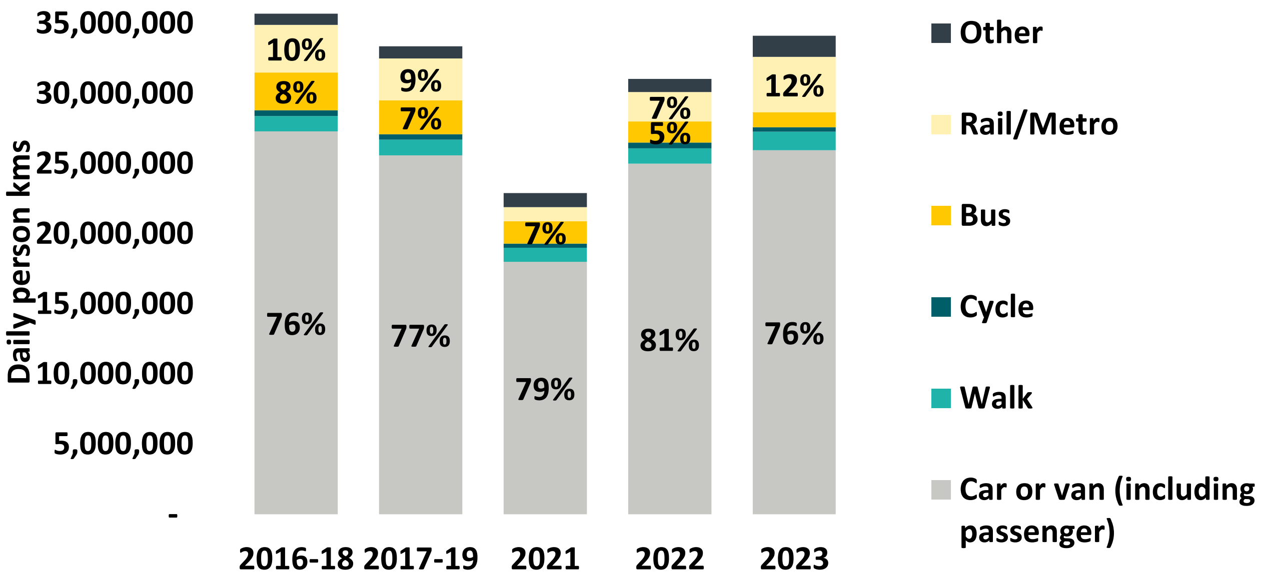
Source: GM TRADS (2016-18, 2017-19, 2021, 2022, & 2023)
Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

Section 1.4 also set out that achieving the 2040 Right Mix target will enable us to **deliver our economic growth ambitions without increasing overall motor-vehicle traffic in GM.** For private motor vehicle travel by both GM and non-GM residents - we anticipate this will mean a reduction in distance travelled in the range of 5-10%.

Prior to the onset of the pandemic, total distance travelled by GM residents was reducing. The pandemic resulted in a sharp drop. There has been a significant rebound to 2023, and the total distance travelled in 2023 was 2% above the 2017-2019 survey period.

The share of the total distance travelled by car or van (including passenger) has returned to pre-pandemic levels, 76% in 2023. The share of the total distance travelled by public transport has returned to near pre-pandemic levels, 15% in 2023.

Figure 4: Daily person kms and mode share - GM residents



Source: GM TRADS (2016-18, 2017-19, 2021, 2022, & 2023)
Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

The most significant progress towards the 2040 Right Mix target was always expected to occur later in this decade and the next decade. **However, the fact that both the proportion of trips by car or van, and the total distance travelled by car or van has not decreased between 2016-18 and 2023 increases the challenge we now face in achieving the 2040 Right Mix target.**

2.2 People and place themes and monitoring 2040 Right Mix target progress

We use people and place themes to segment an incredibly complex travel market into distinctive trip types. Monitoring the different types of trips that are being made enables us to identify changes that may not be identifiable at an aggregate level.

It also provides far greater scope for identifying the impact on travel outcomes of things we don't directly control, which we refer to as 'external trends.' Examples of external trends identified later in this document include changes in levels of homeworking, and the increased market share of 'out-of-town' retail locations. Understanding the impact of external trends enables us to learn and adapt.

GM has many possible pathways to the 2040 Right Mix target. Following an adaptive approach enables changes in policies and interventions to respond to the many uncertainties that lie ahead, avoiding the risks inherent in an inflexible plan.

Annex 1 provides this detailed people and place theme level analysis which is used to help us monitor our progress to the 2040 Right Mix target at a more disaggregate level. Our 2023 TRADS Summary Report should also be referred to for more details on the travel behaviour of GM residents.

2.3 Progress on the proposed pathway to 2040 Right Mix target

This section builds on Figure 2 (which summarised the proposed pathway to the 2040 Right Mix target) by setting out progress against each of the individual ‘steps’ in the proposed pathway. The pathway is set out as a series of steps, which would, in reality, be made at the same time, but which are described as separate steps to assist explanation.

In this section we show the scale of contribution that each ‘step’ makes to each of the two strategic 2040 Right Mix target targets, these being; 1) at least 50% of all journeys in GM to be made by active travel and public transport, and 2) no increase in overall motor-vehicle traffic.

We also identify for each ‘step’ (Step 1 aside), both positive and negative influences, with references to relevant evidence presented in this document where possible. This approach helps identify trade-offs which need to be considered when assessing performance.

<table>
<tr><td>1</td><td colspan="2"></td><td>6% population growth leads to 6% growth in trips (and distance travelled) by all modes</td></tr>
<tr><td colspan="3">Target contribution</td><td rowspan="3">Growth occurring - population growth since 2017 has been slightly higher than expected but remains broadly in line with expectations (see Section 3.3). However, due to the pandemic, there has been greater variation in trip rates than was expected.</td></tr>
<tr><td colspan="2">50:50</td><td>Traffic</td></tr>
<tr><td colspan="2">None</td><td>+6%</td></tr>
<tr><td colspan="4">Trip rates are driven by external factors. Trip rates are continuing to recover from the lows of the pandemic and will be continually monitored. It is possible that any long-term changes in trip rates will not be evenly distributed across the GM resident population.

An obvious area of pandemic induced change has been in the extent of homeworking. Some employers are still adjusting to identify the most appropriate long-term working practices and there is uncertainty still in play. It is however important to emphasise that due to the potential for trip redistribution, GM residents who now work from home more than they did pre-pandemic, don’t necessarily make fewer trips per day.

Other relevant long-term trends that were accelerated by the pandemic include online shopping, and socialising with friends online. But again, it is unclear the extent to which trips replaced by online activity are substituted by different trips.</td></tr>
</table>

<table>
<tr><td>2</td><td></td><td>5% of Wider City Region trips redistributed to Neighbourhood (taking on their characteristics)</td></tr>
<tr><td colspan="2">Target contribution</td><td rowspan="3">Some evidence of positive changes - The proportion of trips by GM residents that were Neighbourhood increased from 41% in 2017 to 45% in 2023. However, this increase did not come from the Wider City Region which in 2023 accounted for c.1.85m trips per day by GM residents, just as it did in 2017.</td></tr>
<tr><td>50:50</td><td>Traffic</td></tr>
<tr><td>Moderate
c. 1pp</td><td>Major
c. 3pp</td></tr>
<tr><td colspan="2">Positive influences</td><td>• Increase in homeworking may have promoted more Neighbourhood trips - but levels of home working have fallen markedly since the highs of the pandemic (see Section 4.5)
• Over 100km of high-quality walking, wheeling & cycling routes delivered since 2017 (see Active Travel in Greater Manchester Annual Report - 2023 for more details)
• Places for Everyone (see PfE Joint Development Plan) promotes densification of existing residential areas (see Figure 42 and Figure 43) - in particular, local centres which have been the focus of resident population growth over the last decade (see Figure 7)
• Continued delivery of active travel and bus infrastructure within existing highways, including elements of road space reallocation (see Greater Manchester Transport Strategy 2040 - Progress Report November 2023 for more details)</td></tr>
<tr><td colspan="2">Negative influences</td><td>• Personal car-keeping per head in 2023 was higher than it was in 2017 (see Figure 31)
• The pre-pandemic trend of comparison good shopping retail businesses favouring out-of-town locations has intensified - these locations typically offer free and abundant car parking (see Section 4.7)
• Some of our Growth Locations are located peripherally. Development on these sites can be expected to contribute to growth in Wider City Region trips (see Figure 42 and Figure 67)</td></tr>
</table>

<table>
<tr><td>3</td><td></td><td colspan="2">10% of Wider City Region trips redistributed to Regional Centre (with no increase in car travel)</td></tr>
<tr><td colspan="2">Target contribution</td><td colspan="2" rowspan="3">No evidence to date - There were c.1.85m Wider City Region trips per day by GM residents in 2023, just as there was in 2017. In comparison GM residents made c.500,000 Regional Centre trips in 2023, which was down from c.650,000 in 2017.</td></tr>
<tr><td>50:50</td><td>Traffic</td></tr>
<tr><td>Major
c. 3pp</td><td>Major
c. 5pp</td></tr>
<tr><td colspan="2">Positive influences</td><td colspan="2">• Places for Everyone (see <u>PfE Joint Development Plan</u>) promotes densification of existing residential areas (see Figure 42 and Figure 43) - in particular, the Regional Centre which has been the focus of resident population growth over the last decade (see Figure 7)
• Regional Centre benefits from agglomeration which continues to promote high-density and high productivity employment
• Public transport provision continues to be strongly focussed on the Regional Centre, the location in GM where for multiple reasons (incl. limited highway capacity and car parking) public transport is at its most competitive vs. car - see Figure 58
• Capped and simplified fares promote more use of public transport (see GM Bus Fare Cap Evaluation for more details)</td></tr>
<tr><td colspan="2">Negative influences</td><td colspan="2">• Personal car-keeping per head in 2023 was higher than it was in 2017 (see Figure 31)
• ‘Avoid public transport’ messaging during pandemic has had a lasting impact on perception of PT for some - evidence to be reviewed in a future Travel in GM document
• Increased homeworking amongst white collar professionals (which are concentrated in the Regional Centre) dilutes the impact of redistribution associated with employment (see Section 4.5)
• Retail trends favouring out-of-town locations (see Section 4.7)</td></tr>
</table>

<table>
<tr><td>4</td><td></td><td colspan="2">Town Centres double their resident population leading to changes in Town Centre trips</td></tr>
<tr><td colspan="2">Target contribution</td><td rowspan="3">Too early to assess - Town Centres are going through a period of transition and we have chosen to introduce a new people and place theme to reflect the specific opportunities this presents. We note that the car mode share of Town Centres trips increased from 58% to 65% between 2017 and 2023 (albeit the overall smaller size of the Town Centres people and place theme in 2023 meant that there were less car trips in absolute terms), but caution against drawing a firm assessment at this early stage.</td></tr>
<tr><td>50:50</td><td>Traffic</td></tr>
<tr><td>Moderate c.1pp</td><td>V. Minor <=0.5pp</td></tr>
<tr><td colspan="2">Positive influences</td><td>Places for Everyone (see PfE Joint Development Plan) promotes densification of existing residential areas (see Figure 42 and Figure 43) - in particular, town centres which have been the focus of resident population growth over the last decade (see Figure 7)
Public transport provision continues to be strongly focussed on town centres, with recently completed and on-going improvements Interchanges programmes. The Stockport Interchange development included a complimentary residential element that delivered 196 dwellings alone.
The Mayor’s Town Centre Challenge seeks to regenerate town centres by building a new future through higher density mixed and affordable housing, with local retail and leisure facilities, supported by transport and digital connectivity.</td></tr>
<tr><td colspan="2">Negative influences</td><td>Traffic has swiftly returned to pre-pandemic levels (see Section 2.1) which threatens to make town centres less attractive - eg safety, air quality, permeability etc
The pre-pandemic trend of comparison good shopping retail businesses favouring out-of-town locations has intensified - these locations typically offer free and abundant car parking (see Section 4.7)
The pandemic provided a short-term shock to the profile of demand for public transport. This had a direct impact on our financial sustainability which we continue to be hampered by.</td></tr>
</table>

<table>
<tr><td>5</td><td></td><td>Rapid transit modes account for 6% of Wider City Region trips</td></tr>
<tr><td colspan="2">Target contribution</td><td rowspan="3">No evidence to date - Rail / Metro (which account for the majority of rapid transit currently available to GM residents) mode share of Wider City Region trips by GM residents remained less than 2% in 2023, just as it did in 2017. This is not completely unexpected given that the pathway to the 2040 Right Mix target that was set out in 2019 anticipated the most significant changes to occur in the 2030s. Metrolink has seen a strong recovery however, with patronage now exceeding pre-pandemic levels.</td></tr>
<tr><td>50:50</td><td>Traffic</td></tr>
<tr><td>Moderate c.1pp</td><td>Moderate c.2pp</td></tr>
<tr><td colspan="2">Positive influences</td><td>• The Metrolink network has been extended with the Trafford Park Line which opening in March 2020.
• Continued delivery of public transport infrastructure within existing highways, including elements of road space reallocation (see Greater Manchester Transport Strategy 2040 - Progress Report November 2023 for more details)
• Integrated ticketing and increase of PAYG contactless - evidence to be reviewed in a future Travel in GM document
• Launch of Operation Avro enabling GMP to focus additional effort on tackling crime and anti-social behaviour - evidence to be reviewed in a future Travel in GM document
• Major events continue to flourish. Co-op Live opening has provided a boost to the Regional Centre leisure market.</td></tr>
<tr><td colspan="2">Negative influences</td><td>• Personal car-keeping per head in 2023 was higher than it was in 2017 (see Figure 31)
• ‘Avoid public transport’ messaging during pandemic has had a lasting impact on perception of PT for some - evidence to be reviewed in a future Travel in GM document
• Industrial action and service performance have impacted the perception of public transport - extensive negative media coverage and particularly so for rail - evidence to be reviewed in a future Travel in GM document
• The pandemic provided a short-term shock to the profile of demand for public transport. This had a direct impact on our financial sustainability which we continue to be hampered by.</td></tr>
</table>

<table>
<tr><td>6</td><td></td><td colspan="2">Walk share increases for Neighbourhood, and Regional Centre trips</td></tr>
<tr><td colspan="2">Target contribution</td><td rowspan="3">Some evidence of positive changes - Walk mode share of Neighbourhood trips by GM residents has increased from 51% in 2017, to 58% in 2023 - nearly 60 million more walking Neighbourhood trips per year. TRADS indicates walk mode share of Regional Centre trips by GM residents has decreased in 2023 in comparison to 2017, but this should not cause immediate concern given both the relatively small sample, and the unique exposure the Regional Centre has to the rapid changes there have been in homeworking employment market. Figure 58 provides reassurance by showing that the proportion of AM Peak inbound trips to the city centre (part of the Regional Centre) by walk increased between 2017 and 2023.</td></tr>
<tr><td>50:50</td><td>Traffic</td></tr>
<tr><td>Moderate
c. 1pp</td><td>V. Minor
<=0.5pp</td></tr>
<tr><td colspan="2">Positive influences</td><td>• Places for Everyone (see PfE Joint Development Plan) promotes densification of existing residential areas (see Figure 42 and Figure 43) - in particular, the Regional Centre which has been the focus of resident population growth over the last decade (see Figure 7)
• Over 100km of high-quality walking, wheeling & cycling routes delivered since 2017 (see Active Travel in Greater Manchester Annual Report - 2023 for more details)
• Launch home to school travel policy to support young people to travel to school more actively and safely (see School Travel Strategy Consultation)
• Vision Zero Strategy - to eliminate all fatalities or serious injuries on our roads by 2040 (see Vision Zero Strategy)
• Streets for All - protecting our most vulnerable road users travelling actively (see Streets for All Strategy)</td></tr>
<tr><td colspan="2">Negative influences</td><td>• Personal car-keeping per head in 2023 was higher than it was in 2017 (see Figure 31)
• Traffic has swiftly returned to pre-pandemic levels (see Section 2.1) which serves to both abstract from walk, and make walking less attractive - eg safety, air quality, permeability etc
• Increased potential for extreme weather events - evidence to be reviewed in a future Travel in GM document</td></tr>
</table>

7		**Cycle share increases for Neighbourhood, Regional Centre, and Wider City Region**
Target contribution **50:50**: **Major c. 2pp**	**Traffic**: **Minor c. 1pp**	**Some evidence of positive changes** - Cycle mode share of Regional Centre trips by GM residents reached 10% in 2023, up from 7% in 2017. The cycle mode share of both Neighbourhood and Wider City Region trips by GM residents has remained less than 2% between 2017 and 2023
Positive influences		• Places for Everyone (see **PfE Joint Development Plan**) promotes densification of existing residential areas (see **Figure 42** and **Figure 43**) - in particular, the Regional Centre which has been the focus of resident population growth over the last decade (see **Figure 7**) • Over 100km of high-quality walking, wheeling & cycling routes delivered since 2017 (see **Active Travel in Greater Manchester Annual Report - 2023 for more details**) • Cycle Hire has granted cycle access to 200,000 people - **evidence to be reviewed in a future Travel in GM document** • Road-space reallocation to improve non-car travel - **evidence to be reviewed in a future Travel in GM document** • E-cycles have become more prominent and have the potential to overcome some barriers to cycling - **evidence to be reviewed in a future Travel in GM document**
Negative influences		• Personal car-keeping per head in 2023 was higher than it was in 2017 (see **Figure 31**) • GM Cycle Hire impacted by anti-social behaviour - **evidence to be reviewed in a future Travel in GM document** • Increased potential for extreme weather events - **evidence to be reviewed in a separate Travel in GM document** • Household bike access remains low at around 25% (**TRADS 2023**) • Increased homeworking has reduced commuting trips (see **Section 4.5**) - even though levels of home working have fallen markedly since the highs of the pandemic • Trip length profiles of cycle and bus trips indicate that they both see around 2 in 3 trips between 2 and 10 kms in length – increased ambition for bus could impact some potential cycle markets **(TRADS 2023)**

<table>
<tr><td>8</td><td></td><td>Bus becomes more attractive as it is better able to respond to local needs</td></tr>
<tr><td colspan="2">Target contribution</td><td rowspan="4">Some evidence of positive changes - October 2024 saw the highest passenger numbers on the bus network since the launch of the Bee Network (and post-pandemic). Patronage during October 2024 was 7% up vs. October 2023. Total bus patronage for the 12 months ending October 2024 was up 5% year on year.</td></tr>
<tr><td>50:50</td><td>Traffic</td></tr>
<tr><td>Moderate</td><td>Minor</td></tr>
<tr><td>c. 1pp</td><td>c. 1pp</td></tr>
<tr><td colspan="2">Positive influences</td><td>
GM has established the Bee Network and made history as the first area to bring local bus services under control in around 40 years. This means that GM is now better placed to deliver bus services that meet the needs of residents and visitors.
GM has signalled its intention to deliver a 30% increase in bus patronage by 2030 from 2022/23 levels. This would mean almost 50 million more journeys being taken by bus each year.
Delivery of ‘contactless tap and go’ integrated payment system has unlocked seamless travel between bus and tram under a single, simple and affordable fare structure. This brings GM in line with other global cities.
GM introduced a £2 ‘cap’ for a single adult journey (£1 for a child) in September 2022. A national £2 cap was subsequently introduced, and while that rose to £3 in January, GM has retained the £2 cap for 2025 - subject to a mid-year review
</td></tr>
<tr><td colspan="2">Negative influences</td><td>
Personal car-keeping per head in 2023 was higher than it was in 2017 (see Figure 31)
While safety perceptions are improving, safety remains a significant barrier to travelling by bus at night with only 70% in 2024 feeling safe travelling at night vs. 65% in 2023 (Network Principles Survey).
‘Avoid public transport’ messaging during pandemic has had a lasting impact on perception of PT for some - evidence to be reviewed in a future Travel in GM document
The pandemic provided a short-term shock to the profile of demand for public transport. This had a direct impact on our financial sustainability which we continue to be hampered by.
</td></tr>
</table>

<table>
<tr><td>9</td><td colspan="2"></td><td>City to City car mode share reduces as public transport becomes more attractive</td></tr>
<tr><td colspan="3">Target contribution</td><td rowspan="4">No evidence to date - Car mode share of City-to-City trips by GM residents in 2023 was around 90%</td></tr>
<tr><td colspan="2">50:50</td><td>Traffic</td></tr>
<tr><td colspan="2">Minor</td><td>Moderate</td></tr>
<tr><td colspan="2"><=0.5pp</td><td>c. 2pp</td></tr>
<tr><td colspan="3">Positive influences</td><td>Continued support for the on-going delivery of the TransPennine Route Upgrade - see Autumn Budget 2024 – HC 295
Establishment of ‘Northern Arc’ and proposals for a new Liverpool-Manchester railway - aligned with Midlands-Noth West Rail Link</td></tr>
<tr><td colspan="3">Negative influences</td><td>Personal car-keeping per head in 2023 was higher than it was in 2017 (see Figure 31)
A large proportion of ‘City-to-City’ trips are between relatively dispersed and low-density locations
Business travel has been impacted by the acceleration of the trend for increased digital communication – National Travel Survey shows that across England the average number of business trips per person reduced by 29% between 2018/19 and 2023. This was well above the corresponding 6% reduction in total trips.
Uncertainty over rail investment in the North of England – when the current 2040 Right Mix target was established, expectations for what would be delivered through the Northern Hub and HS2 rail programmes was very different.
Relative cost of long-distance public transport (especially during peak periods) vs. car has been increasing. Since 2004 there has been an average increase of 76% and 81% for the consumer price of unleaded and diesel fuel, whereas national rail tickets have increased an average of 115%, rising to 127% for ‘anytime’ ticket products[4].
Industrial action and service performance have impacted the perception of public transport - extensive negative media coverage and particularly so for rail - evidence to be reviewed in a future Travel in GM document</td></tr>
</table>

[4] Table 7182: Average change in fares by ticket type, Great Britain, annual data, 2004 to 2024 (ORR, 2024). Derived from: Latest Earnings Networked Nationally Over Night (LENNON) ticketing and revenue database, Office for National Statistics (ONS), Rail Delivery Group (RDG)
Table 4.1.2 Typical retail prices of petroleum products and a crude oil price index (annual). Source: Department for Energy Security and Net Zero (2025)

3. Resident population evidence overview

3.1 Key Facts Summary - GM resident population

How many residents are there?

- 3 million residents in GM in 2025 (2.87m residents in GM in 2021)
- The scale of the resident populations of the GM local authority areas varies greatly. In 2021, Manchester had a resident population of over 550,000 (19% of GM), while Bury had a resident population of around 195,000 (7% of GM).

Where has the most notable growth been occurring?

- Manchester's population alone increased by close to 50,000 between 2011 and 2021, and over the last three decades (1991 to 2021) has grown faster than other major English cities (36%).
- Salford's population grew by 15% between 2011 and 2021, the highest growth rate in the north of England over that period.

How much growth has there been since 2017?

- Between 2017 (the base year for our original Right Mix analysis) and 2022, the total population of GM increased by well over 100,000.

What has contributed to recent changes in the resident population?

- Between 2017 and 2022, births outnumbered deaths, leading to natural increase in the order of 50,000, internal net migration accounted for a loss of 24,000, while international net migration accounted for an additional 91,000.
- Census 2021 shows that Manchester (18%) and Salford (15%) were the local authority areas with the highest proportion of residents whose address one year prior was different to that in which they resided on the day of the Census. Across the other eight local authority areas the corresponding value was 8%.

How is the resident population distributed?

- The resident population is not distributed evenly. The densest concentration is within the M60, and specifically the Regional Centre. There are other notable concentrations around the main town centres, all of which are located outside the M60, but dispersed widely across the city region.
- Broadly speaking, only around 50% of the resident population is in areas of higher density which account for about 20% of the GM city-region.

What is happening to the age structure?

- The resident population age structure did not change radically between 2001 and 2021. It is however evident that the resident population did age. In 2021, 26% were aged 56 or over (24% in 2001), which set against a larger overall population than in 2001, equated to c.750,000 residents, which represents an increase of c.150,000 on the c.600,000 in 2001.

What is happening to the ethnic group make-up?

- The resident population became markedly more diverse between 2001 and 2021. In 2001, less than 10% (1 in 10) were from an ethnic minority group, but by 2021 this had risen to 24% (nearly 1 in 4).
- This proportional increase in ethnic minority groups took place against the backdrop of a growing overall resident population which meant that by 2021 there were c.680,000 ethnic minority residents in comparison to c.220,000 in 2001.
- In 2021, and as was the case in 2001, the largest of these ethnic minority groups was Pakistani (over 200,000 residents). The second largest ethnic minority group in 2021 was Black which accounted for over 130,000 residents, an increase of over 100,000 on the 2001 level.

What type of accommodation is available to residents?

- There were c.1.18m households in GM in 2021, an increase of just over 50,000 (4%) since 2011.
- Between 2001 and 2021 the proportion of flats increased to account for nearly 1 in 5 households. Set against a backdrop of overall growth, this meant that there were nearly 75,000 more flats in 2021 than there were in 2001, which represented an increase of nearly 50%.

What type of tenure are residents living under?

- In 2021, 29% of households were owned outright, 29% owned with a mortgage, 21% in social rent, and 19% in private rent.
- In 2021 there were nearly 220,000 households in private rental, which was approximately 140,000 more than in 2001 (an increase of nearly 180%).
- In 2021 there were 340,000 households that were owned with a mortgage or loan, which was over 50,000 down on 2001 (a roughly 15% decrease).

What do we know about the overall health of residents?

- Average life expectancy (measured in years) at birth in GM is 77.5 for men and 81.3 for women - these are lower than the England averages of 79.4 and 83.1 for men and women (a gap of 1.9 years and 1.8 years respectively)
- In 2021, based on self-assessment around 80% of GM residents had either good or very good health. Those with bad or very bad health numbered around 170,000 accounting for 6% of all GM residents.
- In 2021, 18% of GM residents considered their day-to-day activities to be limited by long-term physical or mental health conditions or illnesses. This translated to around 525,000 GM residents being considered disabled under the Equality Act.
- In GM, over 1 in 3 adults are not physically active enough to maintain good health.
- Nationally there is a strong link between levels of deprivation and the prevalence of obesity, with the 10% most deprived communities seeing 37% of adults classed as obese, in comparison to just 19% in the 10% most affluent.

How much of an issue is deprivation?

- Over 1.1m (40%) GM residents live in areas defined as within the 20% most deprived in England, with the most notable concentrations being within the M60, and around GM's main town centres to the north and east.
- Nearly 1.3m (45%) of GM's residents are classified as either 'Stretched Society' or 'Low Income Living'. This is a far higher share than the UK as whole (33%). Typically, around 3 in 10 of these residents describe their financial situation as 'just managing to make ends meet', and 1 in 10 are 'drawing on savings or running into debt'.

What do we know about the distribution of household disposable income?

- Average net disposable income per household is typically lower within the M60 and around the main town centres where it is commonplace to be less than £15,000. The areas with average net disposable income per household of over £25,000 are almost entirely located towards the outskirts of the GM city-region.
- While average net disposable income per household may be lower within the M60 and around the main town centres, the high volume of households in these areas ensures that they have the highest totals of net disposable income overall.

What do we know about the education of our residents?

- In 2021, there were c.600,000 residents aged 5 and over in full-time education
- In 2021, around 1 in 3 residents aged 16 or over had a degree or above level qualification, up from around 1 in 4 in 2011.
- There is a strong north vs. south divide in GM. Wigan, Bolton, Rochdale, Tameside and Oldham are all in the 20% least qualified in England and Wales

Has car availability been increasing?

- At the household level in 2001, roughly 1 in 3 households had no car available, in 2021 this was closer to 1 in 4. In 2021, there were 20,000 fewer households without a car than there were in 2001, while comparison of the same two Census periods showed an increase of 100,000 two or more car households.
- Between 2011 and 2021 the number of registered private cars in GM grew by 13%, exceeding the 7% growth in the GM population.
- In 2023 there were well over 1.1m cars being kept privately in GM, which equated to roughly one car for every two residents aged 17 or over.

Where has growth in cars per head been highest in the last decade?

- Areas with the lowest private cars per head have seen the biggest increases in the volume of cars privately kept since 2009, effectively playing 'catch up'.
- In comparison, there are only a small number of areas where the volume of privately kept cars has decreased, with these typically being areas with affluent communities where private car-keeping was already very high.

What influences household car keeping?

- The 20% most deprived households were four-times more likely to have no access to a car than the least deprived households. Overall, 27% of households had no access to a car, rising to 40% in our most deprived households.
- In 2021, 10% of detached households had no car, while for flats this was 55%. Conversely, only 7% of flats had two or more cars, in comparison to 56% for detached houses.
- Despite only accounting for 29% of all GM households, those owned with a mortgage or loan accounted for over 50% of GM's two or more car households.
- The areas with highest population density, namely central areas within the M60 and main town centres, have the lowest private cars per head.

3.2 Long-term trend in GM's total resident population

Why does population growth and the nature of it matter?

Understanding where the population is growing is important, as it helps to identify where more network capacity will be needed, and where issues like increased congestion maybe more likely to occur.

Understanding how the population is growing in terms of the characteristics of the population is also important, as different types of people have different requirements when it comes to travel. For example, a growth in the number of young people will mean that more services to schools are likely to be required, and a growth in the working age population could indicate a likely growth in travel around employment centres at peak times.

How do our findings impact the pathway to the 2040 Right Mix vision?

Our 2023 Travel Diary Survey data shows us that on a typical day each resident made around 2 trips per day on average. This means that the fact that there are now around 50,000 more residents than was anticipated when we first established our 2040 Right Mix vision, could in isolation be expected to account for over 35 million additional trips a year. Overall, however, the population trajectory remains broadly in line with expectations.

In 2025, GM's resident population stood at 3 million[5]. In 2021, GM's resident population was 2.87 million, which represented an increase of 185,000 (up 6.9%) compared to the 2011 Census estimate. This rate of growth was slightly higher than that seen across England over the same period (up 6.6%). In 2021, there were nearly 400,000 more residents in GM than in 2001.

It is currently projected that GM will have a total resident population of 3.23 million by 2040[6], which would represent an increase of over 350,000 (+13%) residents in comparison to the 2.87 million recorded through the Census 2021.

At a local authority area level, Manchester's population increased by c.50,000 between 2011 and 2021, and over the last two decades (2001 to 2021) has grown faster than other major English cities (40%). Salford's population grew by 15%

[5] Mid-year population estimates 2024 - Office for National Statistics
[6] 2022-based subnational population projections - Office for National Statistics

between 2011 and 2021 alone, the highest growth rate in the north of England over that period. At the other end of the scale in GM was Wigan, where the population increased by just 3% between 2011 and 2021.

There is considerable variation in the absolute scale of the resident populations of the GM local authority areas. In 2021, Manchester had a resident population of over 550,000 (19% of GM), while Bury had a resident population of around 195,000 (7% of GM). More detail on the distribution of the GM resident population is provided in Section 3.4.

It's projected that Manchester and Salford will account for 36% (c.70,000) of the growth in the total GM resident population expected to occur between the 2021 Census and 2040.[7]

Figure 5: Change in total resident population 1981-2021

District	1981	1991	2001	2011	2021	21 vs. 01
Bolton	260,000	259,000	261,000	277,000	296,000	+13%
Bury	175,000	177,000	181,000	185,000	194,000	+7%
Manchester	438,000	405,000	393,000	503,000	552,000	**+40%**
Oldham	219,000	217,000	217,000	225,000	242,000	+12%
Rochdale	206,000	202,000	205,000	212,000	224,000	+9%
Salford	242,000	220,000	216,000	234,000	270,000	**+25%**
Stockport	289,000	284,000	285,000	283,000	295,000	+4%
Tameside	217,000	216,000	213,000	219,000	231,000	+8%
Trafford	221,000	213,000	210,000	227,000	235,000	+12%
Wigan	308,000	307,000	301,000	318,000	329,000	+9%
GM	**2,575,000**	**2,499,000**	**2,482,000**	**2,683,000**	**2,868,000**	**+16%**

Source: Census 1981, 1991, 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

3.3 Recent changes in the GM total resident population and influences

Between 2017 (the base year for our original Right Mix analysis) and 2022, the total population of GM increased by well over 100,000. In that 5-year period, there were:

- 206,000 births and around 156,000 deaths, leading to natural increase in the order of 50,000;
- 543,000 internal in migrants and 567,000 internal out migrants, leading to internal net migration of -24,000; and

[7] 2018-based subnational population projections - Office for National Statistics

- 218,000 international in migrants and 127,000 international out migrants, leading to international net migration of 91,000.

Census 2021 shows that Manchester (18%) and Salford (15%) were the local authority areas with the highest proportion of residents whose address one year prior was different to that in which they resided on the day of the Census (across the other eight local authority areas the corresponding value was 8%). This markedly higher level of 'churn' may provide Manchester and Salford with specific opportunities to deliver behaviour change at scale.

The currently proposed pathway to the 2040 Right Mix target was based on an assessment of ONS 2016-based sub-national population projections for those aged 5 and over. A review of the now available ONS population estimates for mid-2022[8] indicate that GM had close to 50,000 more residents aged 5 and over than was anticipated when the currently proposed pathway to the 2040 Right Mix was undertaken. The latest ONS mid-2022 estimates point to GM having 2.91m residents in total.

[8] As available in the ONS Population estimates tool for UK released July 2024

3.4 Distribution of GM's total resident population

Why does it matter how the population is distributed?

Areas of high population density attract a wide range of facilities and support services which helps to support low car lifestyles. This makes active travel attractive and helps to support the operation of high-quality public transport in a financially sustainable manner. It is difficult to deliver attractive and financially sustainable public transport in areas with low population density.

In the future, we intend to produce a Benchmarking report which will help to contextualise GM population density patterns vs. those of other city regions.

How do our findings impact the pathway to the 2040 Right Mix vision?

Between 2001 and 2021 the greatest population growth in both absolute and percentage terms occurred in Manchester and Salford. These are the two local authority areas in GM with the highest population density, in effect indicating that the densest parts of GM have been getting denser.

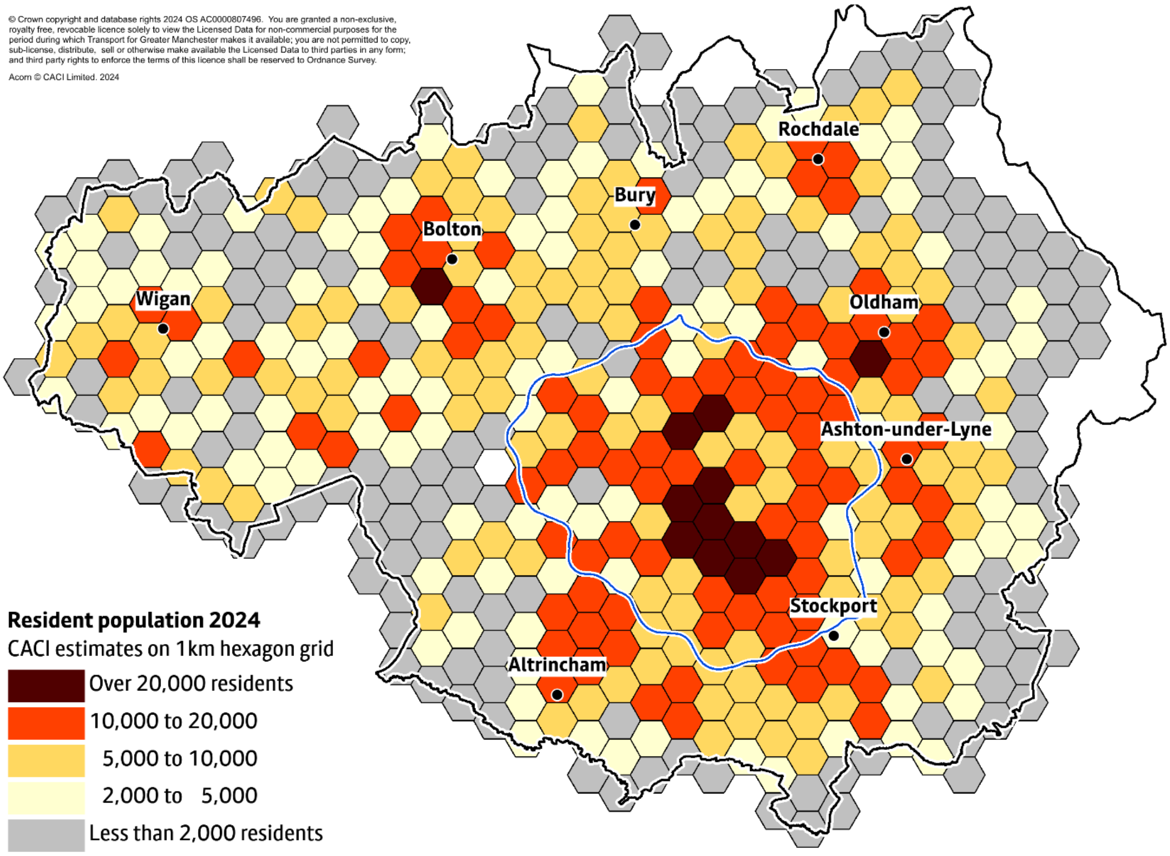
Our 2023 Travel Diary Survey show that residents of both Manchester and Salford on average made more of their trips by walking (36%) compared to GM (31%). Manchester residents made 28% of their trips as a car driver, which was well below the GM average of 39%.

In summary, recent population growth in GM has been particularly concentrated in areas where the proportion of trips made by car is below the GM average. This is a positive in terms of delivering the 2040 Right Mix vision.

The GM resident population is not distributed evenly. Figure 6 shows that the densest concentration is within the M60, and specifically the Regional Centre. Figure 6 also shows other notable concentrations of the resident population around the main town centres, all of which are located outside the M60, but dispersed widely across the city region.

In total there are 505 individual hexagons shown in Figure 6, with 106 (21%) of them accounting for 10,000 or more GM residents. The total GM resident population in these 106 hexagons is 1.48m (51%). This means that a further 1.41m residents (49%) are dispersed at lower density across the remaining 399 hexagons (79%).

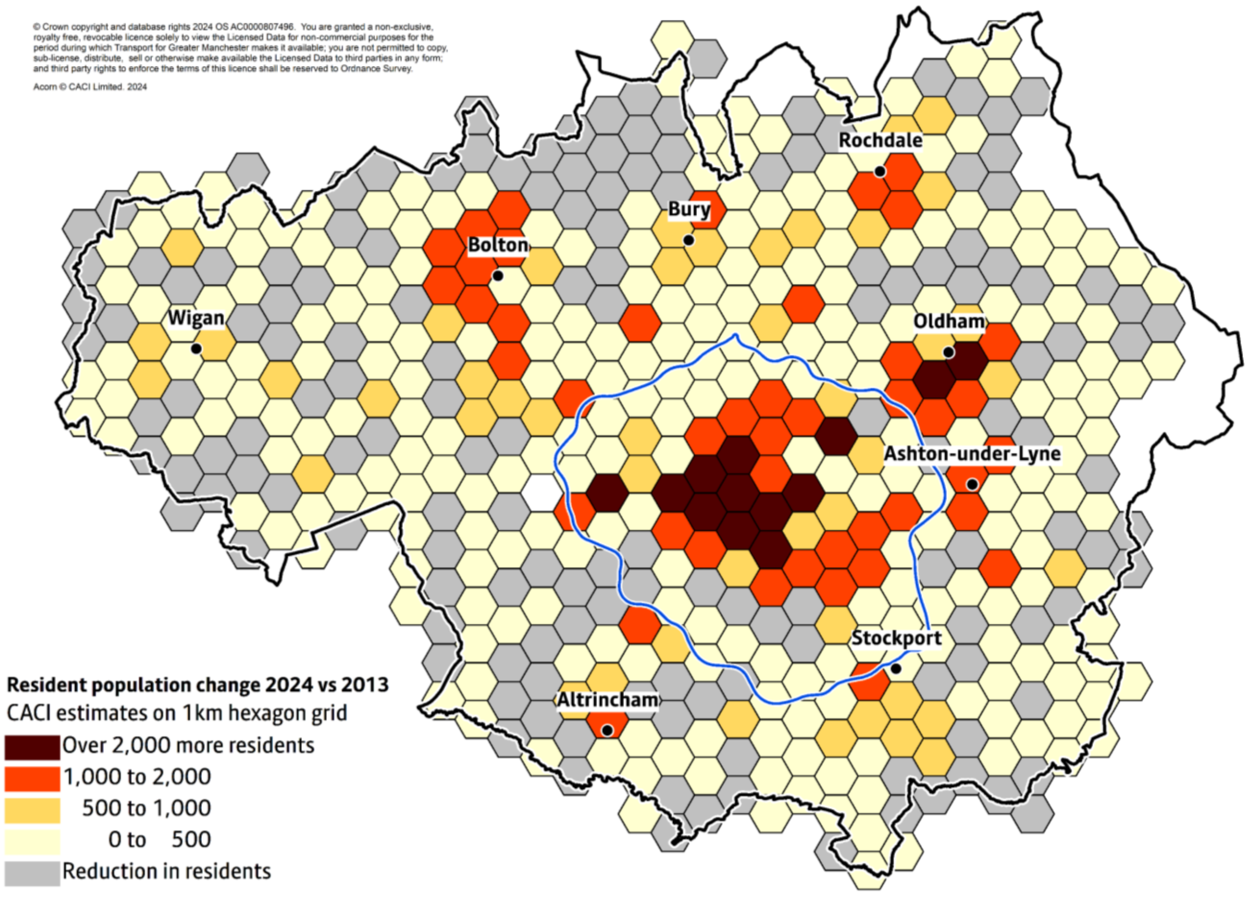
Figure 6: Resident Population Density (2024)



Source: CACI population estimates (2024)

Figure 7 shows that the areas which have seen the biggest increase in resident population since 2013 are primarily associated with the Regional Centre and the main town centres, which as Figure 6 showed have the highest population densities in GM.

Figure 7: Change in resident population (2024 vs.2013)



Source: CACI population estimates (2024 and 2013)

To place Figure 6 and Figure 7 in context, Census 2021 data shows that the GM local authority area with the lowest population density was Rochdale at c.1,400 residents per sq km, with the only local authority areas that exceeded c.2,500 residents per sq km (GM average was c.2,300) being Salford (c.2,800) and Manchester (c.4,800).

In comparison, the entire Greater London area (made up of the 32 London boroughs and the City of London) had a population density of c.5,600 residents per sq km, with 10 of the London boroughs having population densities over twice that of the Manchester local authority area (c.9,600 or more).

Population density isn't the only factor that can influence mode share and average trip length. It is however notable that our 2023 Travel Diary Survey data shows that residents of Manchester (4.8 km) and Salford (4.9 km) had both the shortest average (mean) trip length of all GM local authorities (GM average was 6.2km), and active travel and public transport mode shares well above the GM average of 40% - with Manchester seeing 49%, and Salford (43%).

3.5 Characteristics of GM's resident population

3.5.1 Age structure

Why does the age profile of the resident population matter?

Our 2023 Travel Diary Survey data shows us that travel behaviour varies by age. On a typical day, GM residents on average made 2 trips per day, but those aged 75 or over made only 1.5 on average, while those aged 35-44 made 2.4.

There are differences by mode also, for instance, those aged either 24 or under, or 75 or over were over twice as likely to travel by bus, compared to all other age groups. For cycling, those aged between 20-24 were around three times as likely to travel by cycle, compared to the average for all GM residents.

There are financial implications of the population ageing due to the provision of concessionary travel for residents who qualify for a state pension.

How do our findings impact the pathway to the 2040 Right Mix vision?

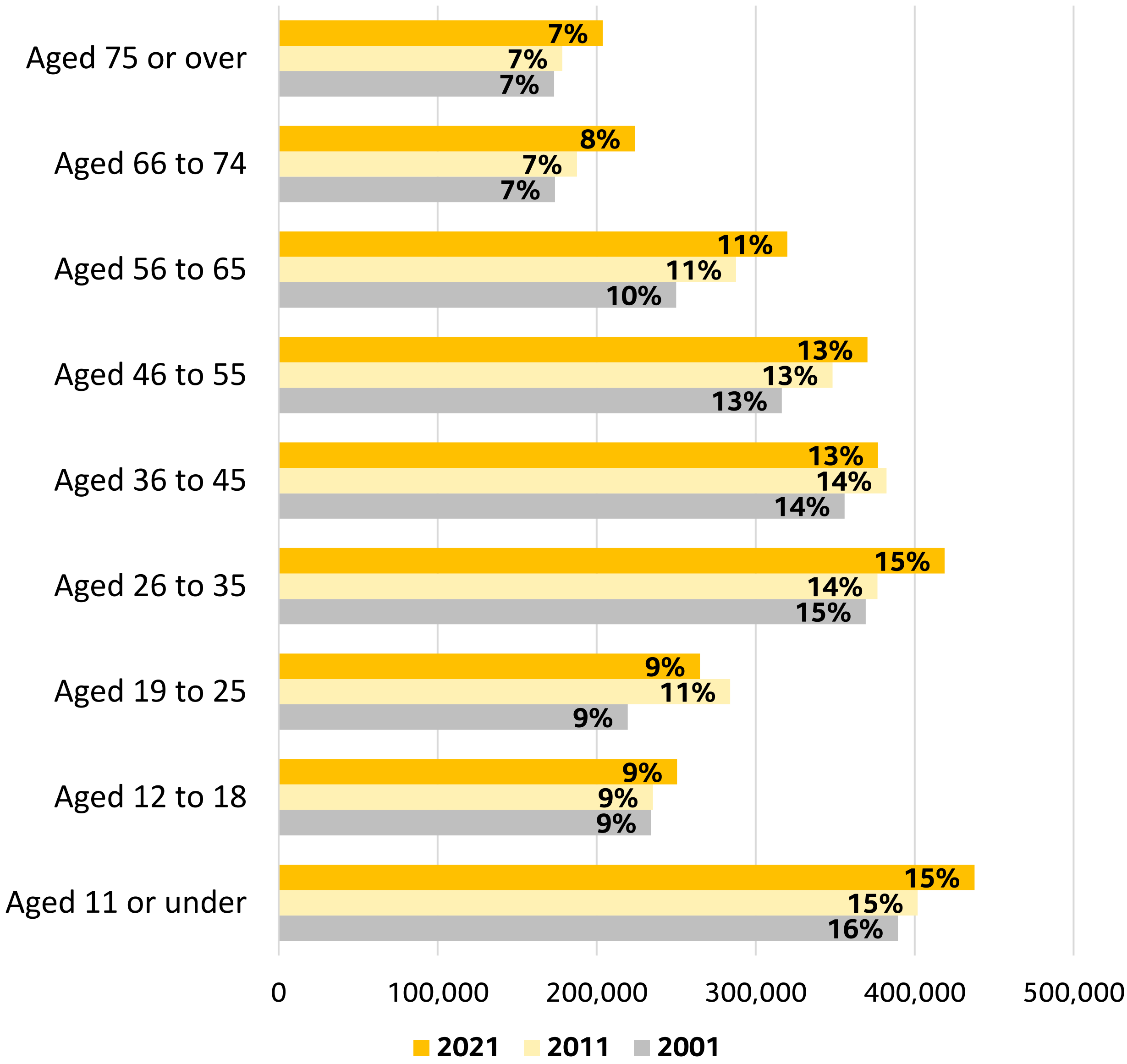
The age structure of the GM resident population did not change radically between 2001 and 2021, and therefore there is no direct reason to adapt the proposed pathway in response.

There are however some distinctive differences in the distribution of age cohorts that should be considered in the context of the proposed pathway. For example, the comparatively higher proportion of residents aged 65 or over in the lower density outer areas of GM are likely to feel less benefit from investment in cycling facilities than areas with high-density concentrations of young adults.

Figure 8 shows that the proportional age structure of the GM resident population did not change radically between 2001 and 2021. Figure 8 does however help to demonstrate how the increases in the overall GM resident population has practical implications. Between 2001 and 2021, there has been an increase of over 80,000 residents aged 66 or above, 240,000 more residents aged between 19 and 65, and 65,000 more residents aged 18 or under. These cohorts have different travel characteristics, which can be demonstrated in simple terms in their eligibility for concessionary travel, likelihood of travelling during peak periods, and whether they are in full-time education or not.

The Places for Everyone (PfE) Joint Development Plan anticipates that the resident population of GM will increase by 195,000 by 2039 (a 7% increase on Census 2021). Around two-thirds of this growth is expected to be in those aged 65 and over.

Figure 8: Age structure of the GM resident population

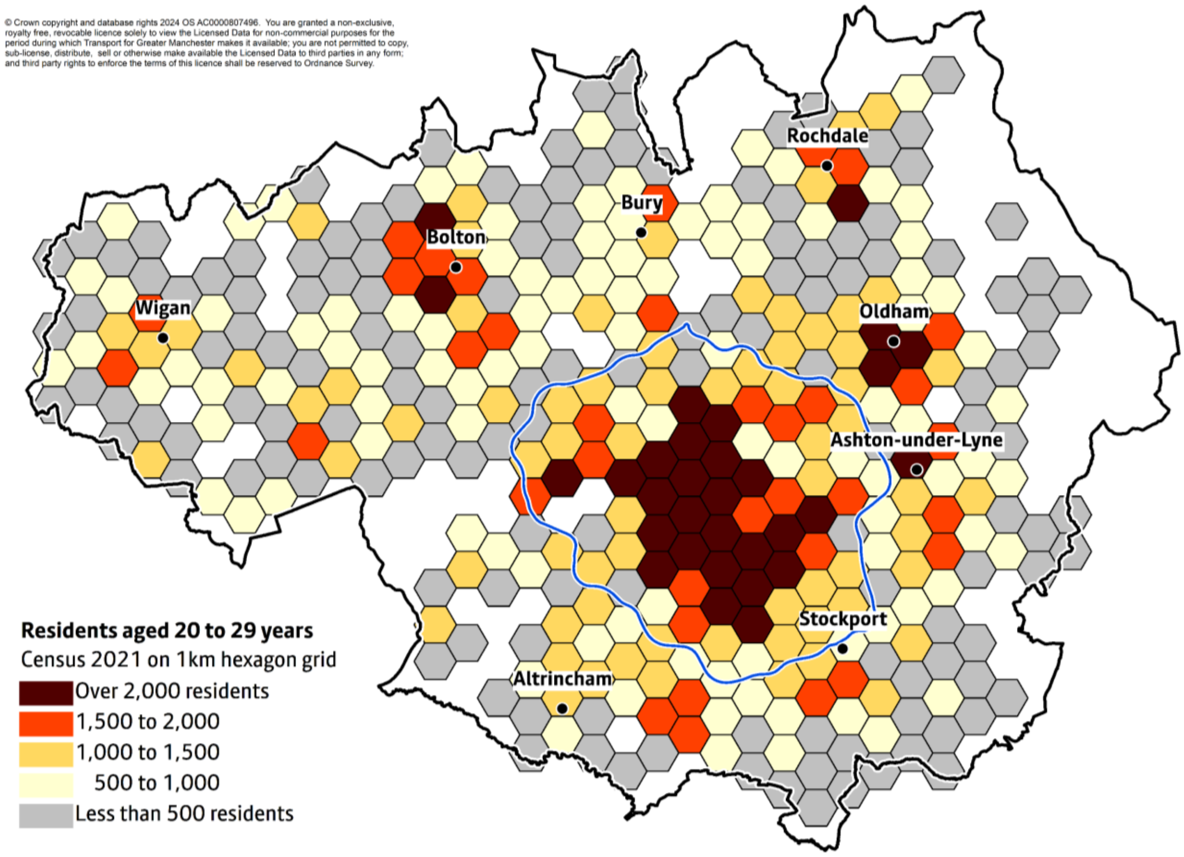


Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

Figure 9 shows that there is a highly concentrated population of 20 to 29 year olds in and around the Regional Centre, this reflects a general propensity for high-density in this area, but also 20-29 year olds being more prevalent (frequently more than 25% of the resident population) than across GM as a whole. It is also noticeable that there are distinctive concentrations around many of our main town centres.

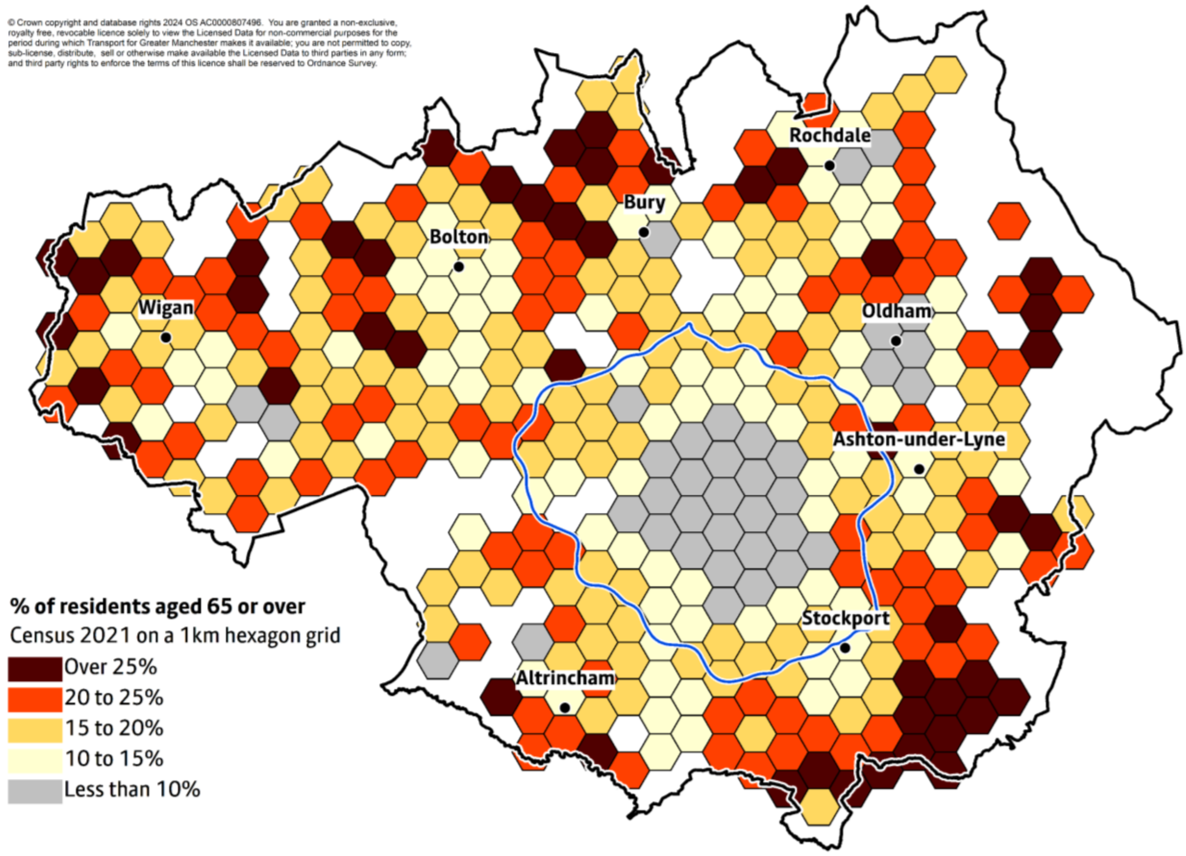
Figure 10 shows the proportion of the resident population that are 65 or over in any given location in GM. This clearly points to a tendency for a comparatively higher proportion of residents aged 65 or over in the lower density outer areas of GM.

Figure 9: 20 to 29 years resident population density



Source: Census 2021 (available at https://www.nomisweb.co.uk/)

Figure 10: % of residents aged 65 or over



Source: Census 2021 (available at https://www.nomisweb.co.uk/)

3.5.2 Ethnic group

Why does the ethnic group profile of the resident population matter?

Our 2023 Travel Diary Survey data shows us that travel behaviour varies by ethnic group. Across all GM households, on average around 1 in 4 didn't have access to a car, but Asian ethnic group households were lower at 20% (1 in 5), while Black ethnic group households were much higher at 40% (2 in 5).

There are differences by mode also, for instance, Black residents made 10% (1 in 10) of their trips by bus, whereas Asian residents made 4% (1 in 25) of their trips by bus.

How do our findings impact the pathway to the 2040 Right Mix vision?

Our 2023 Network Principles research pointed to some specific issues in respect of ethnic minorities using public transport. For instance, ethnic minority tram passengers have reported significant decreases in satisfaction since 2018, particularly concerning the journey to tram stops and daytime travel.

To maximise the potential of delivering our 2040 Right Mix vision we need to ensure that all GM residents are satisfied with public transport. To maximise the potential of delivering our 2040 Right Mix vision we need to ensure that all GM residents are satisfied with public transport. Declining satisfaction with active travel and public transport risks growth in personal car-keeping which is not compatible with sustainable economic growth.

Figure 11 shows that the GM resident population became markedly more diverse between 2001 and 2021. In 2001, less than 10% (1 in 10) were from an ethnic minority group, but by 2021 this had risen to 24% (nearly 1 in 4). This proportional increase in ethnic minority groups took place against the backdrop of a growing overall resident population which meant that by 2021 there were c.680,000 ethnic minority residents in comparison to c.220,000 in 2001. In the analysis in Figure 11 'White' includes 'Irish', 'Gypsy or Irish Traveller', and 'Other White' groups, which in 2021 accounted for c.140,000 or 5% (1 in 20) residents.

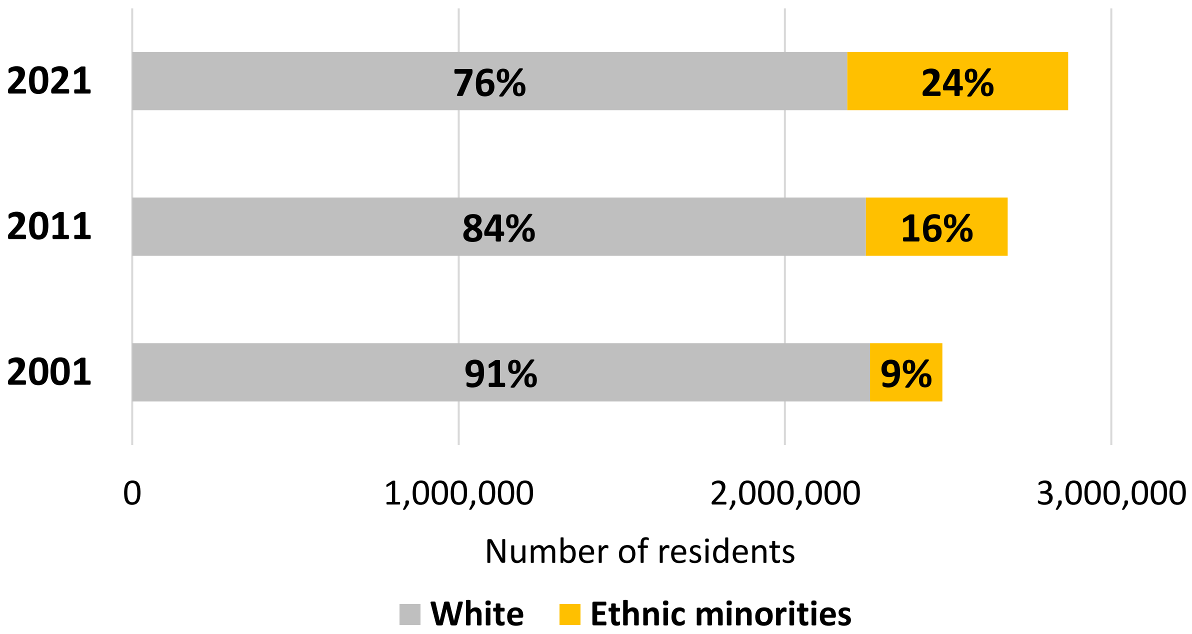
Figure 12 shows that there was substantial growth across all ethnic minority groups between 2001 and 2021. In 2021, and as was the case in 2001, the largest of these ethnic minority groups was Pakistani (over 200,000 residents). The second largest ethnic minority group in 2021 was Black which accounted for over 130,000 residents, an increase of over 100,000 on the 2001 level.

Figure 13 shows locations (Output Areas) in GM where concentrations (outliers vs. the GM average) of ethnic minority groups reside. This shows numerous distinctive ethnic minority group concentrations focussed on selected main town centres and the area within the M60 immediately adjacent to the Regional Centre, areas that in the context of GM are relatively well served by public transport. These are areas which Figure 6 showed are amongst the most densely populated in GM, and Figure 7 showed have been the subject of the highest population growth since 2013.

There are many areas where two or more ethnic minority groups are concentrated, but there are also some obvious instances of individual ethnic minority group concentrations. For example, Indian around Bolton town centre, Pakistani around Bury, Rochdale, and Oldham town centres, Bangladeshi around Oldham town centre, and Black in the areas adjacent to the Regional Centre.

Census 2021 showed that across the entire GM resident population less than 2.5% indicated that they couldn't speak English either well or at all.

Figure 11: Ethnic group of GM resident population - overview



Note: In this analysis 'White' includes 'Irish', 'Gypsy or Irish Traveller', 'Roma', and 'Other White' groups

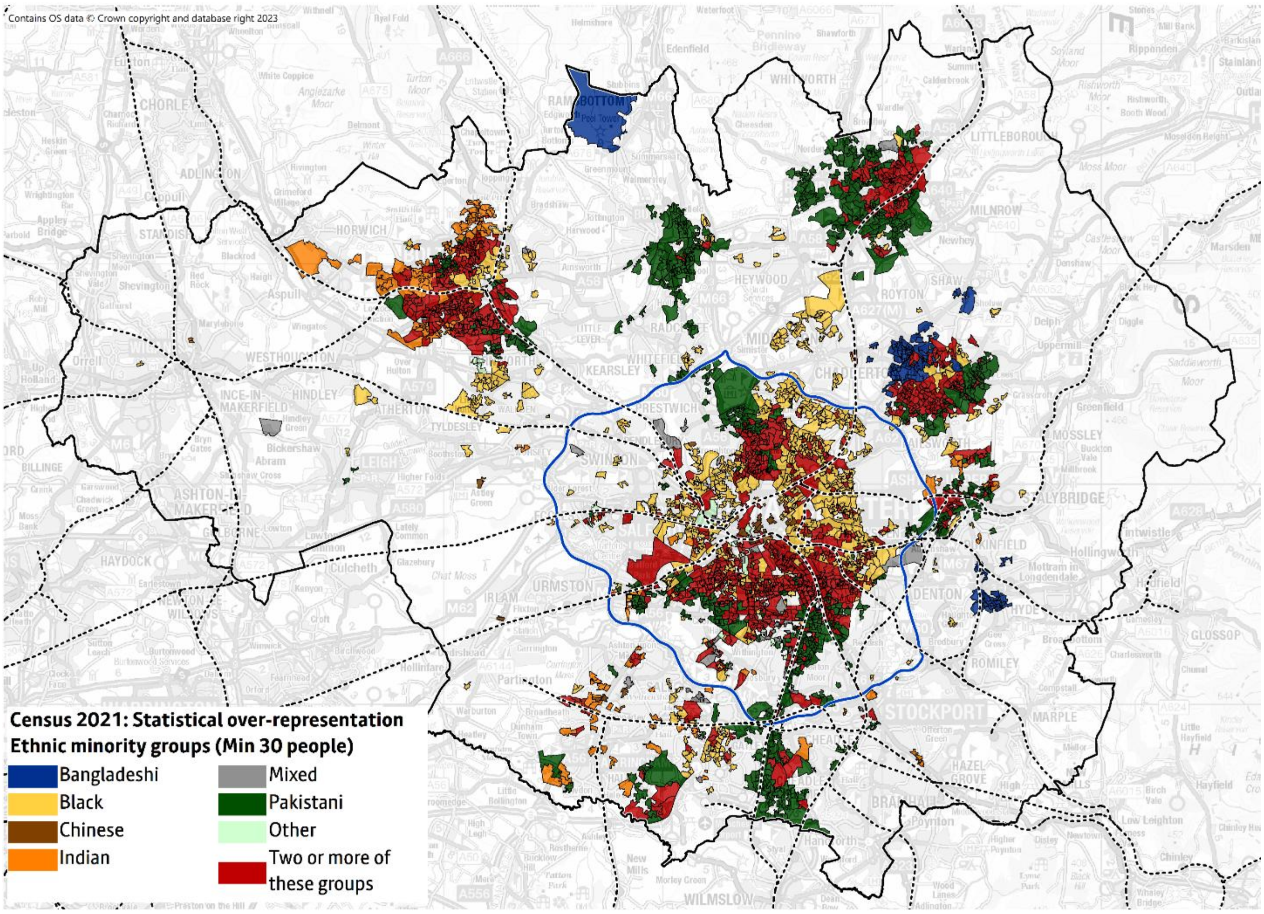
Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

Figure 12: Ethnic Group of GM resident population - detailed breakdown

Ethnic Group	2001		2011		2021	
	Number	%	Number	%	Number	%
White	2,261,000	91.1%	2,248,000	83.8%	2,191,000	76.4%
Mixed	33,000	1.3%	61,000	2.3%	87,000	3.0%
Indian	36,000	1.4%	53,000	2.0%	69,000	2.4%
Pakistani	75,000	3.0%	130,000	4.8%	209,000	7.3%
Bangladeshi	20,000	0.8%	34,000	1.3%	46,000	1.6%
Chinese	12,000	0.5%	26,000	1.0%	30,000	1.0%
Black	30,000	1.2%	74,000	2.8%	134,000	4.7%
Other	16,000	0.6%	56,000	2.1%	102,000	3.5%
All	**2,482,000**	**100.0%**	**2,683,000**	**100.0%**	**2,868,000**	**100.0%**

Note: In this analysis 'White' includes 'Irish', 'Gypsy or Irish Traveller', 'Roma', and 'Other White' groups
Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

Figure 13: Concentrations of ethnic minority residents in GM



Source: Census 2021 (available at https://www.nomisweb.co.uk/)

3.5.3 Other protected characteristics

Under the Equality Act 2010 there are nine protected characteristics, two of which; age, and race (in the form of ethnic group) have already been highlighted. Key statistics on the remaining seven are provided in Annex 2. The fact some protected characteristics are in Annex 2 is not a reflection of their importance. However, the absolute scale of groups, the extent to which there are minority groups, and the geographical spread all vary, and in some cases detailed analysis within the context of this document would not be appropriate.

Why do the remaining protected characteristics matter?

In the exercise of our functions we must place due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.

As a practical example, our Personal Security research undertaken early in 2024 showed that when people feel unsafe travelling by public transport it impacts their experience and travel behaviour. It only takes one poor experience to really stick with people.

From an inclusion perspective, women, disabled people, people experiencing racial inequalities (PERI), and the LGBTQI+ community are most at risk. This impacts on these groups, feeling that they must adjust their behaviour to protect their personal security. This can involve stopping travelling by public transport entirely, temporarily stopping, or altering when they travel.

We need to explore all opportunities for improving the perception and experience of using public transport for these groups who are currently disproportionately impacted by issues relating to personal security.

How do our findings impact the pathway to the 2040 Right Mix vision?

To maximise the potential of delivering our 2040 Right Mix vision we need to ensure that all GM residents are satisfied with public transport. Declining satisfaction with active travel and public transport risks growth in personal car-keeping which is not compatible with sustainable economic growth.

3.5.4 Households and their composition

Why does household composition matter?

Census 2021 showed that there is a relationship between household composition and car availability. Overall, 27% of GM households didn't have access to a car, but for households in which couples live with children this was 8%. Conversely these households are nearly twice as likely to have 2 or more cars (59% vs. GM average of 30%).

Our 2023 Travel Diary Survey data shows that residents with no cars in their households made 84% of their trips by active travel or public transport. In households where there was at least one car for every adult only 26% of their trips were by active travel or public transport.

Section 3.6 provides more information on car-keeping by GM residents and its implications.

How do our findings impact the pathway to the 2040 Right Mix vision?

The profile of household composition has remained broadly consistent between 2001 and 2021 which suggests there is no specific reason to adapt the pathway. There is however strong evidence of a link between household composition and travel outcomes, which means we will continue to monitor household composition across GM where possible.

Finding ways to weaken the current relationship between car availability and dependent children will support our progress towards the 2040 Right Mix Vision. This is a key driver for current activity that aims to support improved travel to school outcomes.

The 2021 Census estimated that there were c.1.18m households in GM, an increase of just over 50,000 (4%) since 2011.

The number of households increased in all ten GM districts between 2011 and 2021, ranging from an increase of c.11,600 in Salford (up 11.2%) to 1,800 in Trafford (up 1.9%). The percentage increase in Salford was more than double the growth rate in any of the other GM districts.

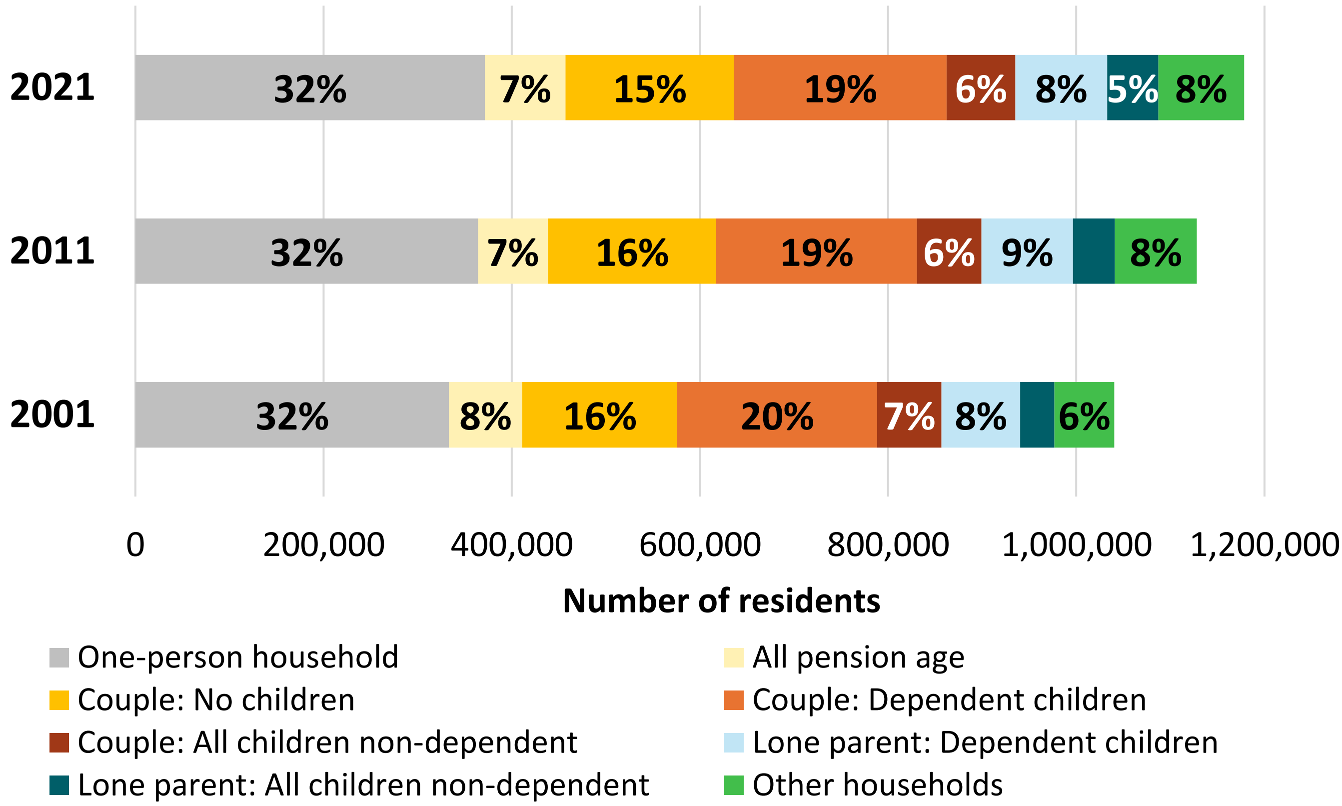
The average number of residents per household across GM increased from 2.38 in 2011 to 2.43 in 2021[9]. The largest increase was in Manchester, with the average

[9] Average number of residents per household values calculated using 'all residents' divided by 'all households'.

household size changing from 2.45 to 2.57 residents per household. Wigan was the only GM district where average household size fell, albeit only slightly, from 2.33 to 2.30 residents per household. It is possible that there is a link between the comparatively higher level of resident population growth among ethnic minority groups (as shown in Figure 12) and these changes. In 2021, Oldham had the highest average number of residents per household at 2.60.

Figure 14 shows that the profile of household composition has remained broadly consistent between 2001 and 2021. Nearly 1 in 3 households are one person, while a little over 1 in 4 have dependent children.

Figure 14: Household composition of GM residents



Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

3.5.5 Accommodation type and tenure

Why does accommodation type and tenure matter?

Census 2021 showed that there is a relationship between both accommodation type and tenure, and car availability. Across GM, 10% of detached households had no car, while for flats this was 55%. Our 2023 Travel Diary Survey shows that residents of flats typically make around half of their trips by walking, whereas for those in detached and semi-detached houses only around quarter of their trips are made by walking.

In terms of tenure, despite only accounting for 29% of all GM households, those owned with a mortgage or loan account for over 50% of GM's two or more car households. Only 15% of GM's private rent households had access to 2 or more cars, and for social rent households this was lower still at 9%. Importantly, when thinking about equity and increasing prosperity, in 2021 55% of social rent households did not have access to a car or van.

Our 2023 Travel Diary Survey data shows that residents with no cars in their households made 84% of their trips by active travel or public transport. In households where there was at least one car for every adult only 26% of their trips were by active travel or public transport.

Section 3.6 provides more information on car-keeping by GM residents and its implications.

How do our findings impact the pathway to the 2040 Right Mix vision?

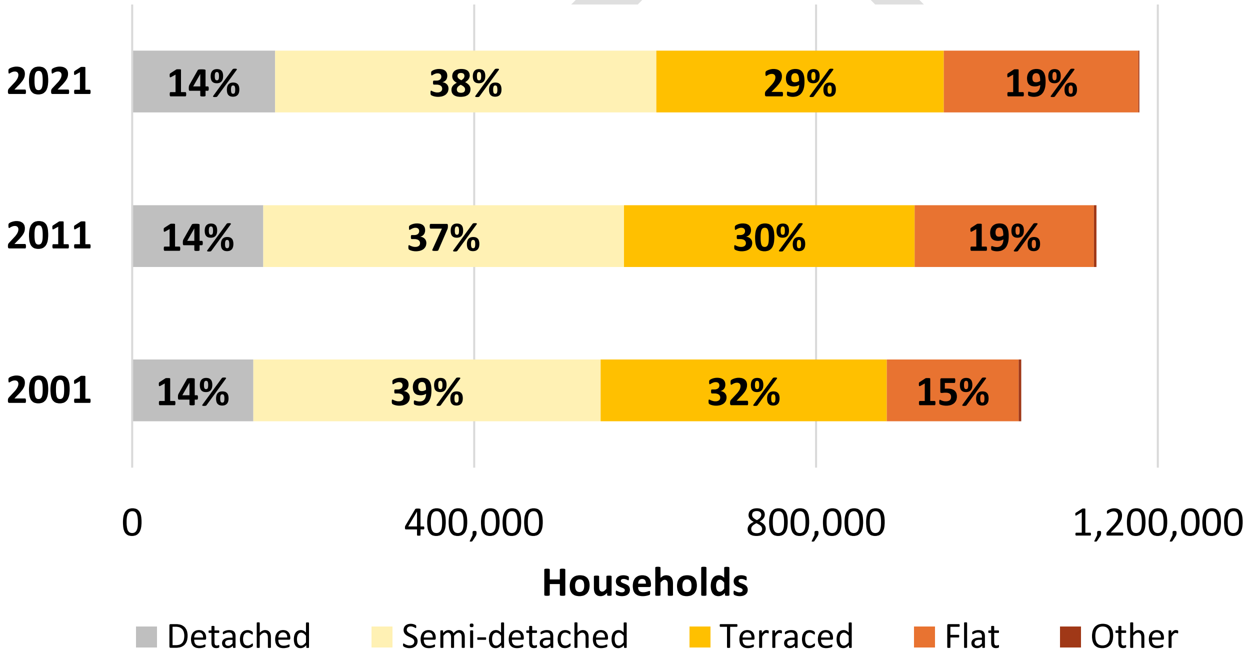
Between 2011 and 2021 there was no significant change to the profile of the type of accommodation in GM, and therefore no materially positive contribution to the Right Mix pathway.

There has however been significant change over the same period in terms of tenure profile with a reduction in households owned with a mortgage or a loan, and an increase in private rent households. This is an external trend that has the potential to put downward pressure on personal car-keeping in GM, particularly with recent strong price growth in the cost of private rent.

Figure 15 shows that between 2001 and 2021 there was a reduction in the proportion of GM households that were terraced, and an increase in the proportion of flats so that accounted for nearly 1 in 5 households. These changes took place against a backdrop of overall growth, meaning that there were nearly 75,000 more flats in 2021 than there were in 2001, representing an increase of nearly 50%.

The PfE Joint Development Plan acknowledges that a diverse range of housing will be required to meet the future needs of GM residents. It forecasts that smaller households will account for over half of the expected growth in households. It is anticipated that this will further strengthen the demand in apartments, particularly given cost pressures and the increased reliance on private rented accommodation. However, some single and couple households will want or need to live in larger dwellings, for example to facilitate homeworking or accommodate visiting relatives. There is scope to increase the number of families living in apartments, especially if higher density neighbourhoods can be made more inclusive for all age groups.

Figure 15: Type of accommodation (GM households)

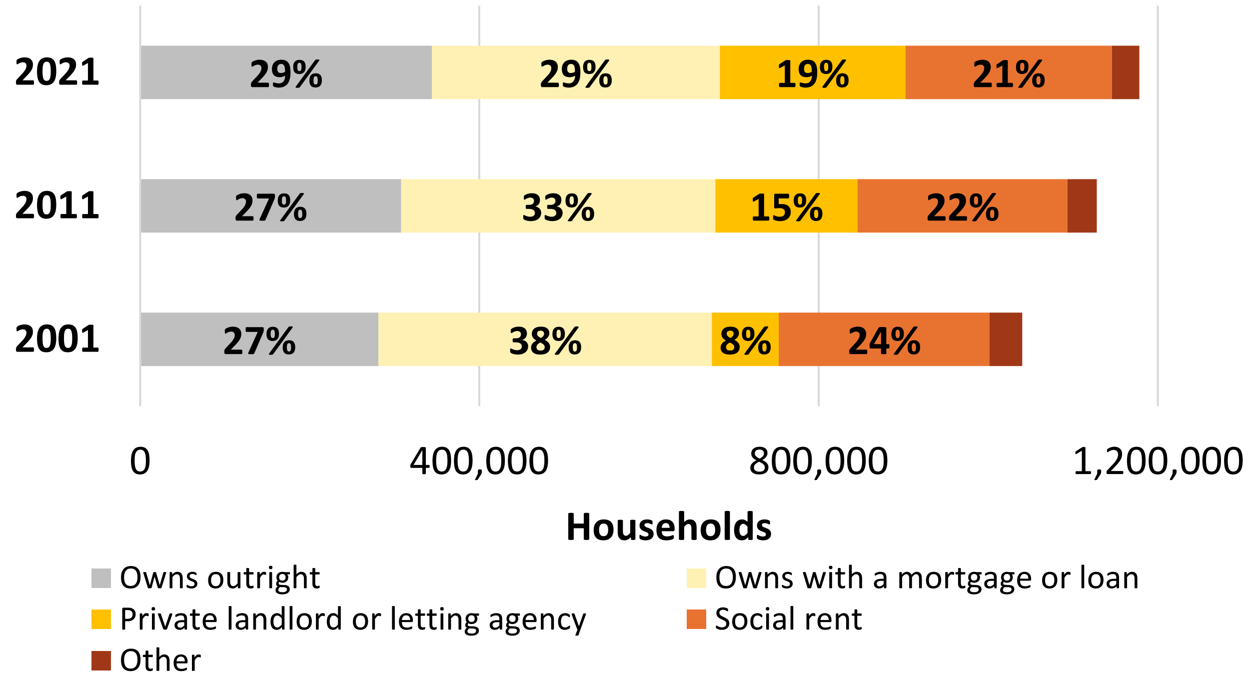


Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

Figure 16 shows that between 2001 and 2021 there was very substantial growth in the proportion of GM households that were renting from a private landlord or letting agency. In 2001 there were approximately 80,000 households in private rental, but by 2021 this had increased to nearly 220,000 (an increase of nearly 180%). In absolute terms, the social rent sector has broadly remained static at around 245,000 households.

In the owner-occupied sector there was an increase in proportion of households who owned outright with this reaching 29% and accounting for over 340,000 households in 2021 (an increase of 22% on 2001 levels). For those that were owned with a mortgage or loan the story was quite different, in 2021 there were 340,000, which was over 50,000 down on 2001 (a roughly 15% decrease).

Figure 16: Tenure of GM households



Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

3.5.6 Health

Why does health matter?

Our 2023 Travel Diary Survey data shows that of those who find their day-to-day activities limited a lot by a health or disability problem, only 20% walk 5 or more days a week (compared to 44% for all residents). At the same time these residents are more than twice as likely than average to live in households without access to a car.

2 in 3 GM resident adults are now considered to be overweight. Travelling by active travel and public transport is a way of building physical activity into daily routines, beyond that offered by car travel. But we also know that people who are obese or overweight are less likely to exercise in public.

How do our findings impact the pathway to the 2040 Right Mix vision?

The pathway to the 50:50 target that is part of the 2040 Right Mix vision is heavily reliant on increases in active travel. The findings presented here indicate that significant cohorts of the GM resident population are likely to face health related barriers to increasing active travel use. With 2 in 3 GM adults overweight, both the role of active travel, and the overall prize are great.

Average life expectancy (measured in years) at birth in GM is 77.5 for men and 81.3 for women. This gender gap in life expectancy is observed globally and has been narrowing in the UK since the 1970s. GM life expectancies are lower than the England averages of 79.4 and 83.1 for men and women (a gap of 1.9 years and 1.8 years respectively)

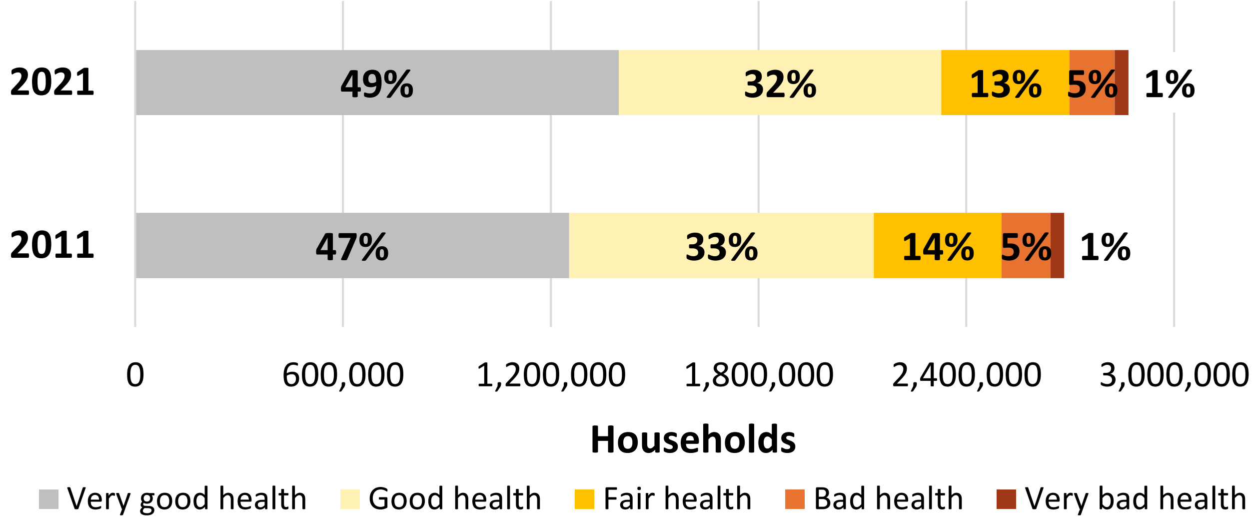
The average healthy life expectancy in GM is also lower than the average across England for both female and males. Healthy life expectancy in GM is 60.7 for females and 61.0 for males, compared to 63.9 for females and 63.1 for males across England. Out of GM's ten local authorities, Trafford has the highest health life expectancy for females (66.9) and Salford has the lowest (57.4).[10]

Figure 17 shows that based on self-assessment around 80% of GM residents had either good or very good health in 2021, which was consistent with 2011. Those with

[10] The state of ageing in Greater Manchester, GMCA, January 2024

bad or very bad health numbered around 170,000 in 2021 accounting for 6% of all GM residents.

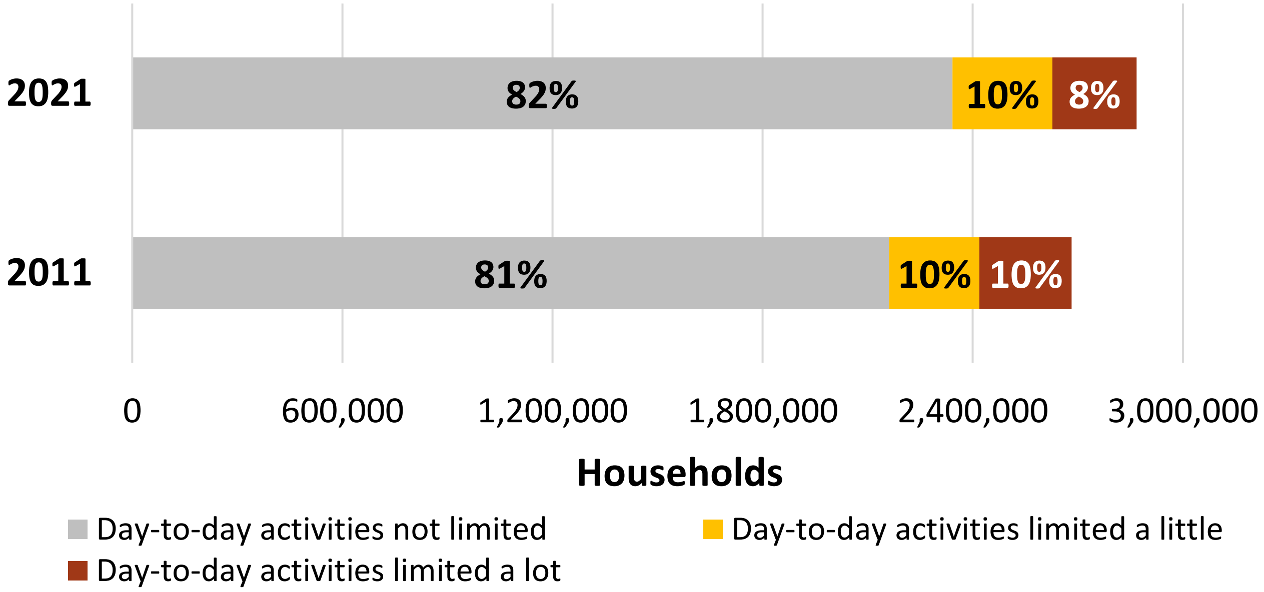
Figure 17: General Health self-assessment of GM residents



Source: Census 2021, 2011 (available at https://www.nomisweb.co.uk/)

Figure 18 shows that in 2021 and based on self-assessment, 18% of GM residents considered their day-to-day activities to be limited by long-term physical or mental health conditions or illnesses. This translated to around 525,000 GM residents being considered disabled under the Equality Act.

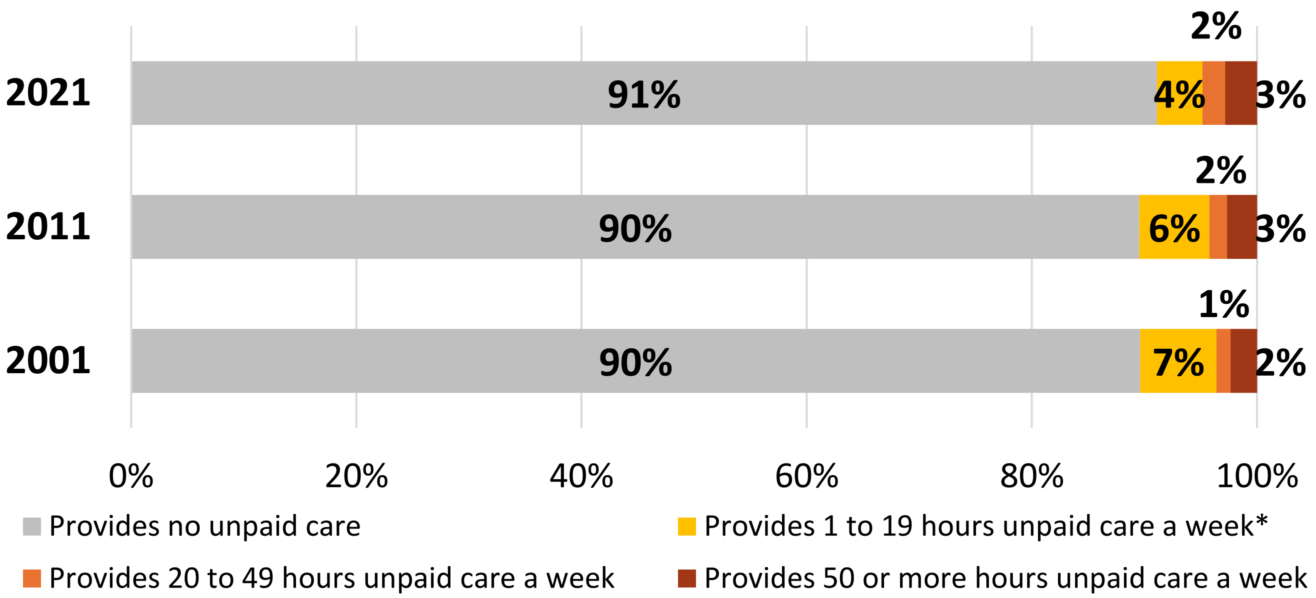
Figure 18: Disability (GM residents)



Source: Census 2021, 2011 (available at https://www.nomisweb.co.uk/)

Figure 19 shows that the proportion of residents providing unpaid care remained broadly stable between 2001 and 2021. Approximately 1 in 10 GM residents provide unpaid care, and in 2021 around 1 in 20 were providing 20 or more hours of unpaid care.

Figure 19: % of GM residents providing unpaid care

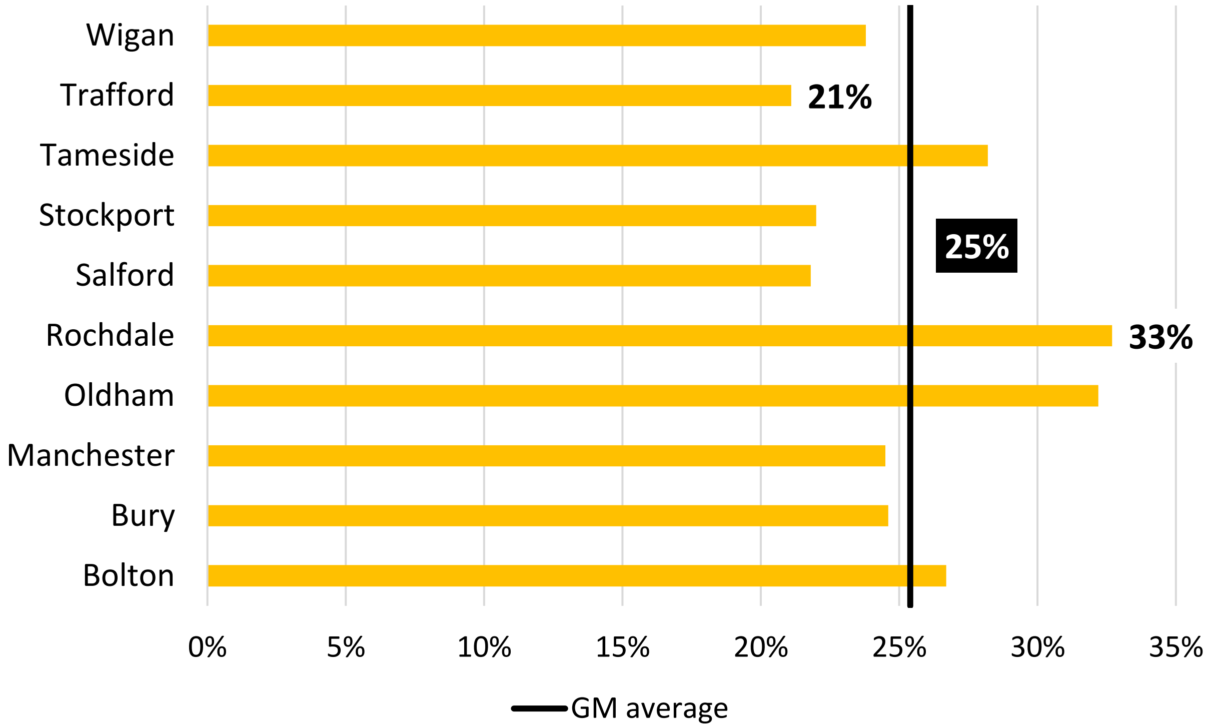


* 2021 wording was '19 hours or less'

Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

Figure 20 shows that in 2022/23, 25% of GM resident adults were considered physically inactive. Physical inactivity is defined as engaging in less than 30 minutes of moderate physical activity per week. There was some disparity across GM with around 1 in 3 Rochdale adults physically inactive, while the more prosperous Trafford had the lowest rate at closer to 1 in 5 adults.

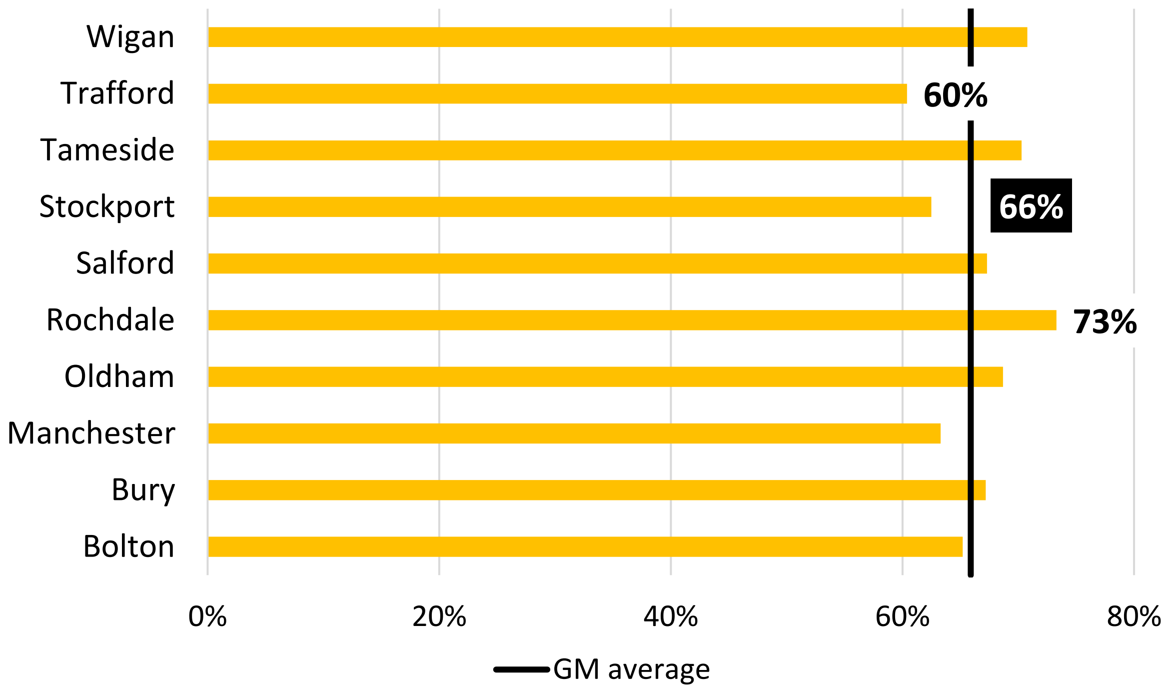
Figure 20: % of physically inactive adults (19+ years) in 2022/23



Source: Obesity Profile: short statistical commentary July 2022 (available at Office for Health Improvement & Disparities)

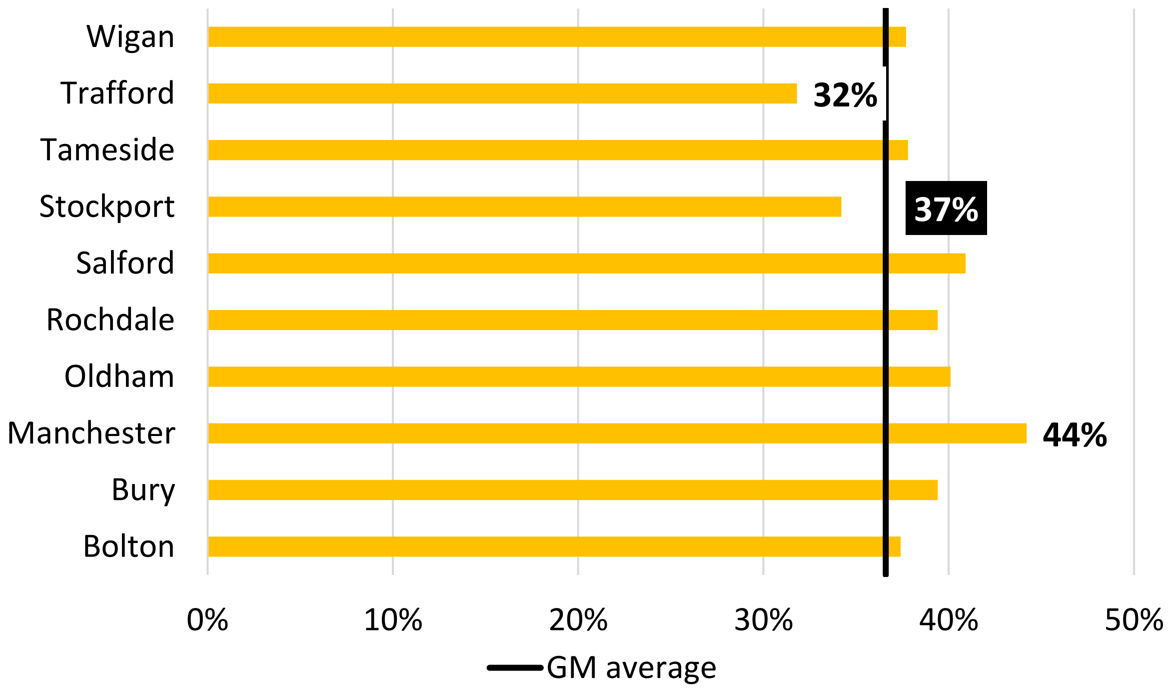
Figure 21 and Figure 22 demonstrate that a large proportion of the GM resident population is overweight. Figure 21 shows that 2 in 3 of all GM resident adults were overweight in 2022/23, with Rochdale having the highest rate of 73%, and Trafford the lowest rate at 60%. Figure 22 shows that over 1 in 3 of all GM resident Year 6 children were overweight in 2022/23, with Manchester having the highest rate of 44%, and Trafford the lowest at 32%.

Figure 21: % of overweight (including obese) adults (18+ years) in 2022/23



Source: Obesity Profile: short statistical commentary July 2022 (available at Office for Health Improvement & Disparities)

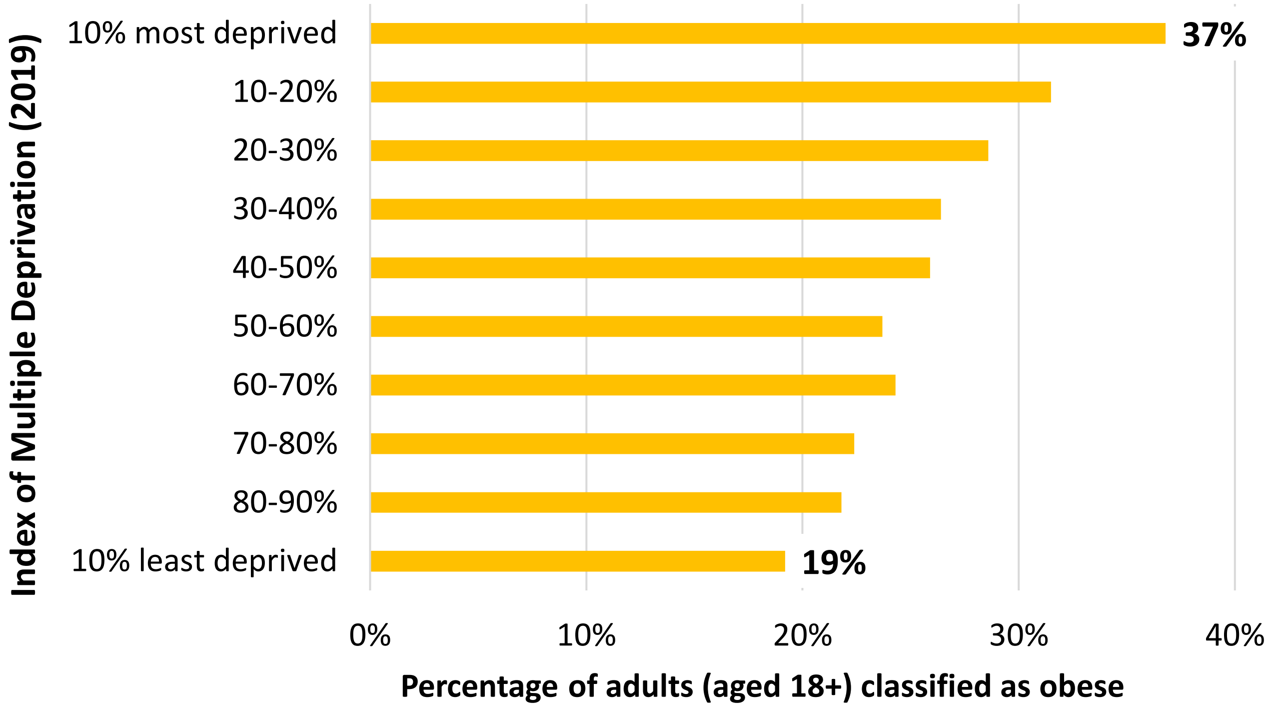
Figure 22: % of overweight (including obese) Year 6 (10-11 years) in 2022/23



Source: Obesity Profile: short statistical commentary July 2022 (available at Office for Health Improvement & Disparities)

Figure 23 shows that there are clear disparities in the prevalence of obesity with higher prevalence in areas of greater deprivation - something that Figure 24 demonstrates GM faces a particular challenge with.

Figure 23: % of adults classed as obese by deprivation decile, England, 2020 to 2021



Source: Obesity Profile: short statistical commentary July 2022 (available at Office for Health Improvement & Disparities)

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[11]. 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[12], but more recent analysis suggests that wider costs may already be higher at £58 billion[13].

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.

[11] 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

[12] Public Health England (2017). Health matters.

[13] Frontier Economics (2022). Estimating the full cost of obesity in the UK

3.5.7 Deprivation

Why does deprivation matter?

Deprivation is not compatible with our vision. It threatens residents reaching their full potential, which translates into GM underperforming.

Our 2023 Travel Diary Survey data shows that 'Stretched Society' and 'Low Income Living' residents account for nearly 2 in 3 bus trips, and only 1 in 3 car driver trips. In a fairer society there would not be such stark differences in the profile of users by transport mode.

How do our findings impact the pathway to the 2040 Right Mix vision?

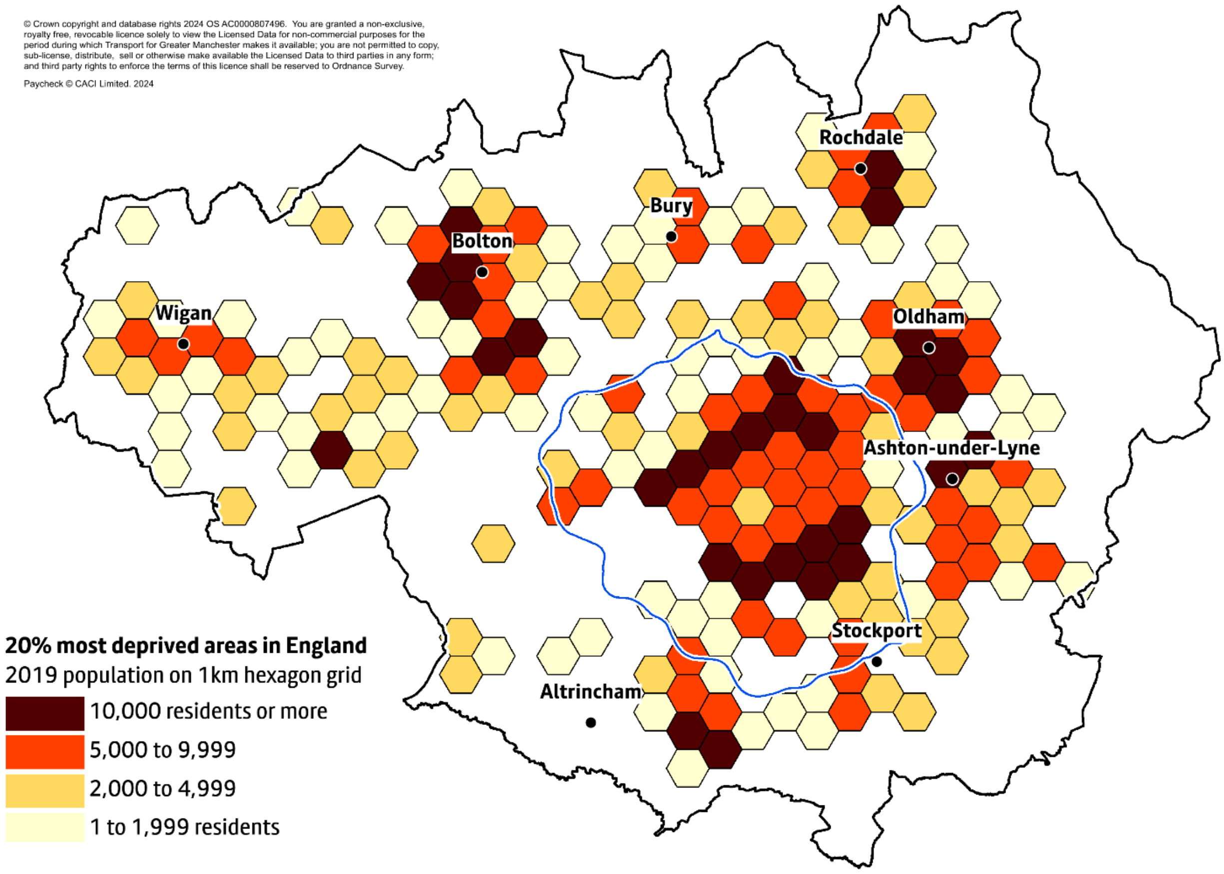
Nearly 1.3m (45%) GM residents are classified as either 'Stretched Society' or 'Low Income Living'. This has many implications, one of which is that even if it were desirable, it would be highly unlikely that these residents will be able to afford to adopt electric vehicles en masse ahead of 2038 when we intend for GM to be carbon neutral. This only serves to reinforce the need to deliver a Bee Network that enables residents to access the opportunities they want and need without having to rely on personal car-keeping.

Figure 24 shows the communities (and the density of their resident population) within GM that are ranked within the 20% most deprived across England based on an index of multiple deprivation that using a weighted approach combines the following seven distinct domains of deprivation:

- Income (22.5%)
- Employment (22.5%)
- Health deprivation and disability (13.5%)
- Education, skills training (13.5%)
- Crime (9.3%)
- Barriers to housing and services (9.3%)
- Living environment (9.3%)

In total over 1.1m (40%) GM residents live in areas defined as within the 20% most deprived in England, with the most notable concentrations being within the M60, and around GM's main town centres to the north and east.

Figure 24: Residents of areas ranked as the 20% most deprived in England

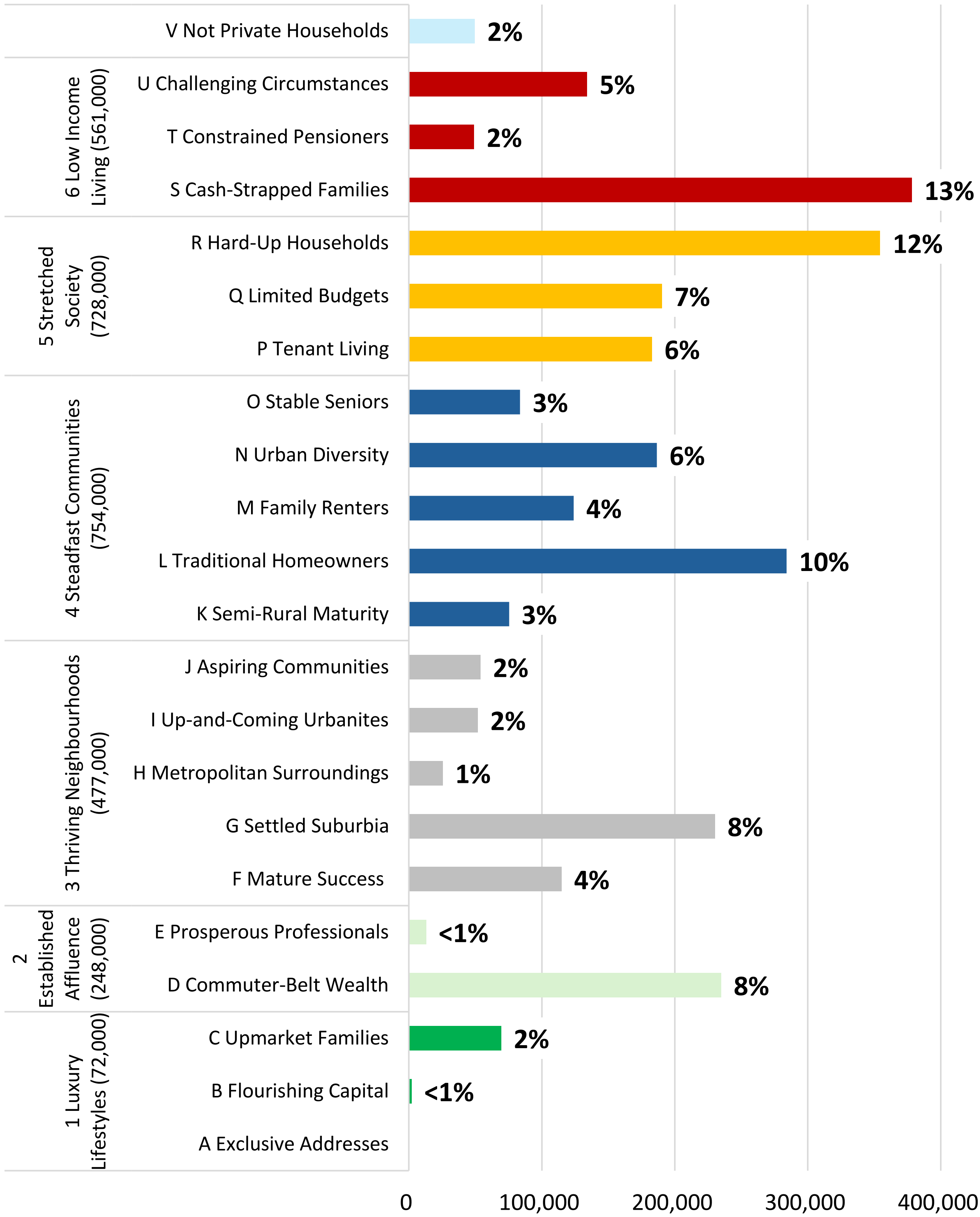


Source: English Indices of Deprivation 2019 (available at https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019)

Figure 25 shows the Acorn profile of the GM resident population, which in keeping with Figure 24, points to high levels of deprivation. It is estimated that nearly 1.3m (45%) of GM's residents can be classified as either 'Stretched Society' or 'Low Income Living'. This is a far higher share of the population than the UK as whole (33%). These residents are typically:

- Over 50% more likely than average to live in households that have no access to car, while those that do - are far more likely to be driving older vehicles (which typically perform more poorly in respect of air quality).
- much more likely to be unemployed, with 'Low Income Living' over twice as likely than average.
- over 50% more likely than average to be a current cigarette smoker.
- only around 1 in 10 are educated to degree level – this is far lower than the over 4 in 10 within the most affluent categories.

Figure 25: Acorn profile of the GM resident population (2024)



Source: Acorn 2024 ©CACI Limited. The applicable copyright notices can be found at http://www.caci.co.uk/copyrightnotices.pdf

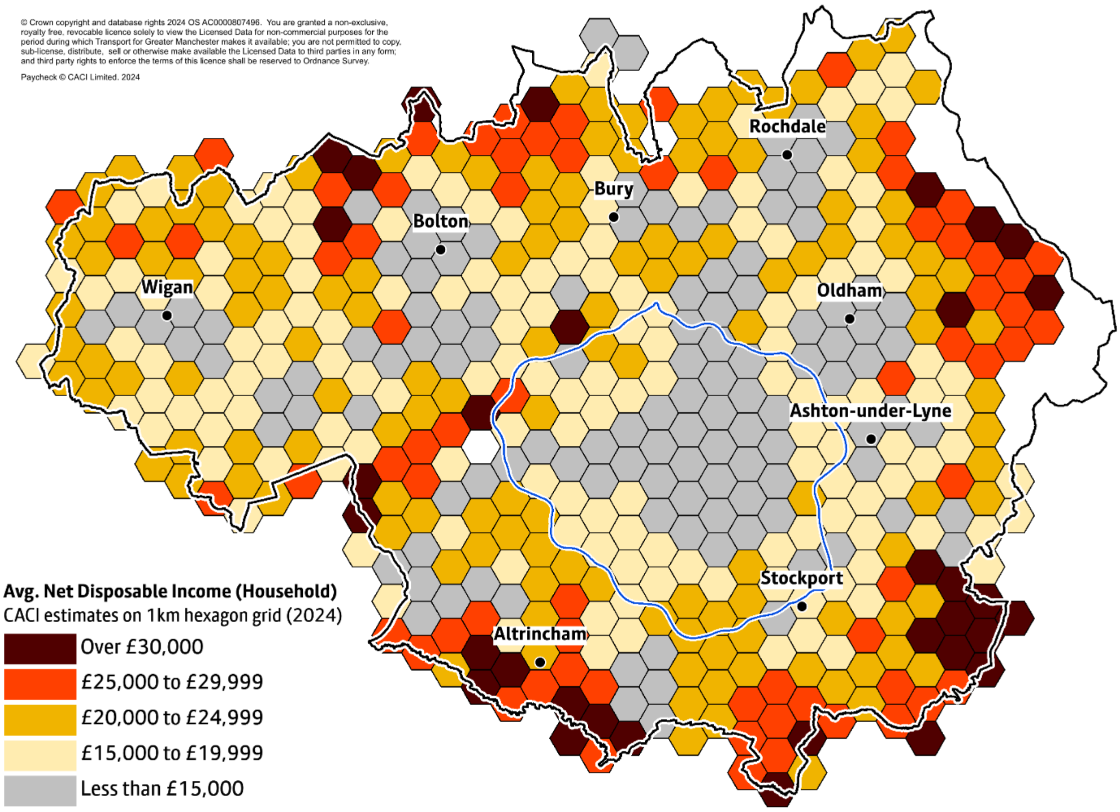
3.5.8 Disposable income and financial vulnerability

Figure 25 showed that nearly 1.3m (45%) of GM's residents can be classified as either 'Stretched Society' or 'Low Income Living'. Typically, around 3 in 10 of these residents describe their financial situation as 'just managing to make ends meet', and 1 in 10 are 'drawing on savings or running into debt'.

Figure 26 shows that the average net disposable income per household is typically lower within the M60 and around the main town centres where it is commonplace to be less than £15,000. The areas with average net disposable income per household of over £25,000 are almost entirely located towards the outskirts of the GM city-region.

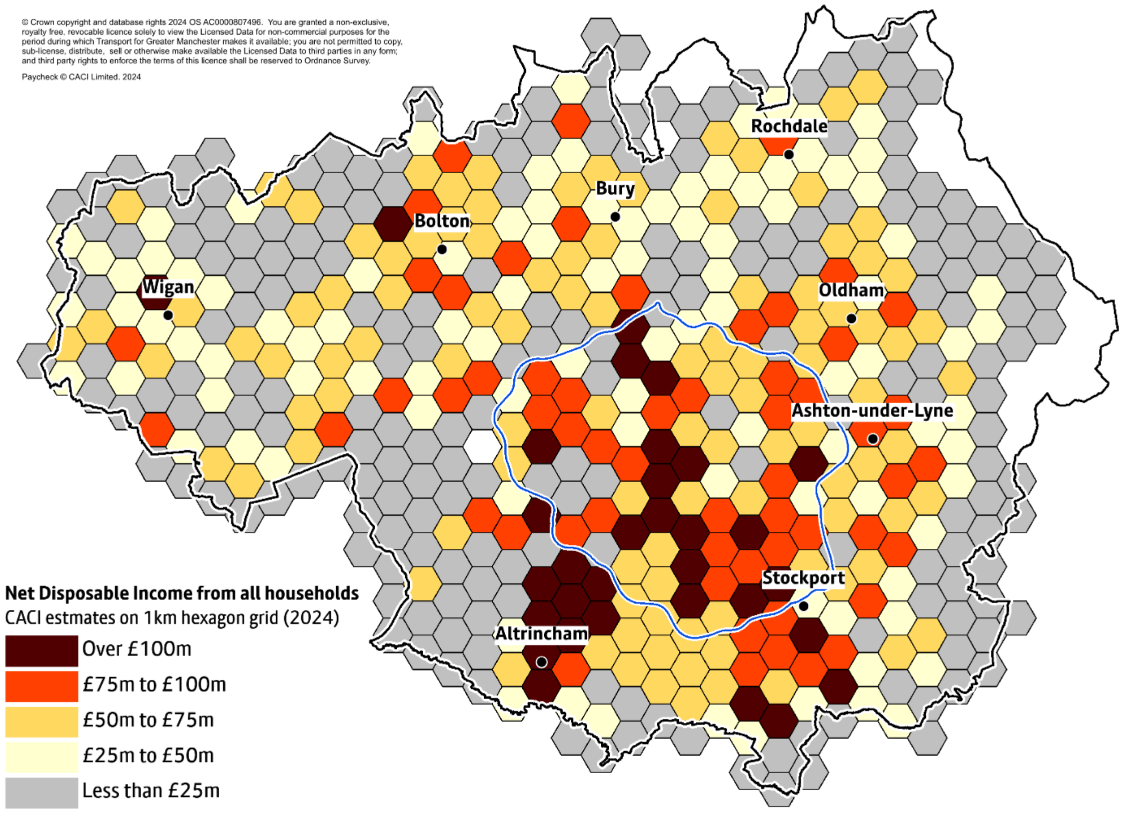
Figure 27 reflects household density by showing total net disposable income from all households. This clearly shows that while average net disposable income per household may be lower within the M60 and around the main town centres, the high volume of households in these areas ensures that they have the highest totals of net disposable income overall.

Figure 26: Average Net Disposable Income per household (2024 Paycheck, CACI)



Source: Paycheck 2024 (CACI)

Figure 27: Total Net Disposable Income from all households (2024 Paycheck, CACI)



Source: Paycheck 2024 (CACI)

3.5.9 Transport related social exclusion in GM

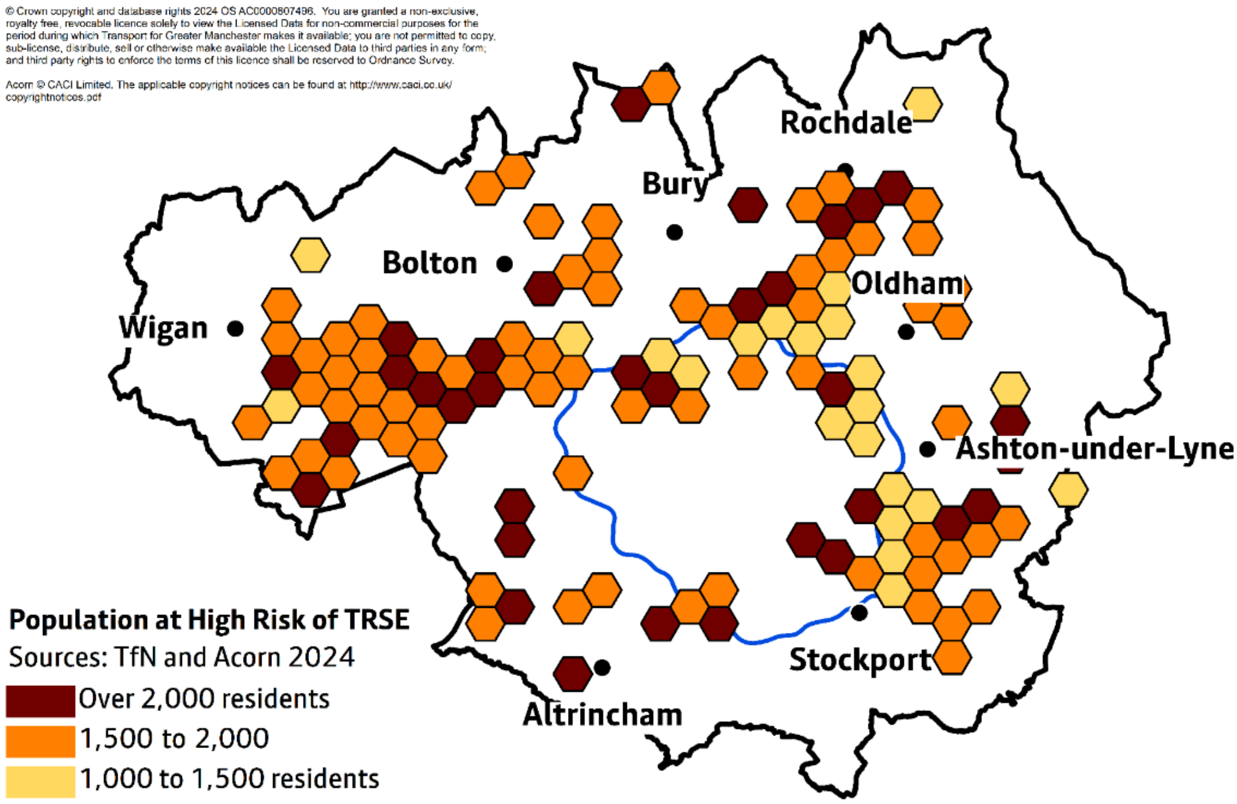
In 2022, TfN launched a spatial method for calculating the population at high risk of transport related social exclusion (TRSE) which helped to raise the profile of the issue within GM. TfN define TRSE as: "being unable to access opportunities, key services, and community life as much as needed, and facing major obstacles in everyday life through the wider impacts of having to travel to access key destinations."

TRSE is caused by: the combination of fragmentation, unreliability, and high costs in the public transport system; poor conditions for walking, cycling, and wheeling in car dominated environments; and the high levels of car dependency that result from this.

TRSE leads to: poor access to key destinations for those primarily dependent on public transport and active travel, alongside forced car ownership, in which households are compelled to have access to a car, despite the costs of car access causing them significant hardship.

Figure 28 shows the distribution of the c.420,000 residents that are estimated to live in areas identified by TfN as at high risk of TRSE these locations. It's notable that the distribution follows a different pattern to that shown in Figure 24, in part due to the main town centres providing a range of key destinations within easy of their residents.

Figure 28: Population at high risk of transport related social exclusion



Source: Analysis of TfN transport related social exclusion dataset, 2022, and Acorn 2024 ©CACI Limited. The applicable copyright notices can be found at http://www.caci.co.uk/copyrightnotices.pdf

3.5.10 Education

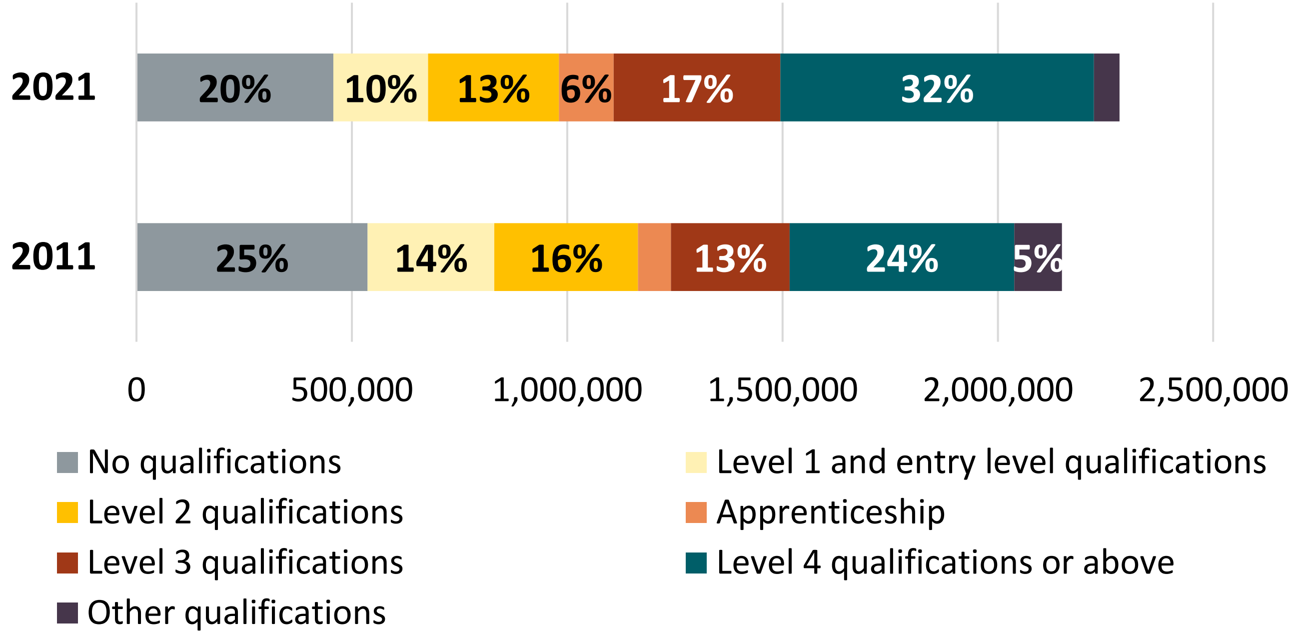
Census 2021 showed that c.610,000 GM residents aged 5 years and over were in full-time education (schoolchildren and full-time students), which represented nearly 1 in 4 of all GM residents aged 5 years and over.

We previously provided a 'travel market deep dive' for education in our TRADS 2022 Summary Report which indicated that on a typical school day the education market (including escort and staff trips) accounted for around 2 million trips. The TRADS 2022 Summary Report should be referred to for more details on how the different segments of the education travel market vary in terms of their travel outcomes.

Figure 29 shows how over the last two Census periods (2001 is not directly comparable) there has been some significant changes in profile of highest level of qualification within the GM resident population aged 16 and over. In 2021, around 1 in 3 were Level 4 or above (degree level and above), this was well up on the broadly 1 in 4 of 2011. There has also been a considerable increase in the proportion of residents with Level 3 qualifications (2 or more A Levels or equivalent) - up from 13% in 2011, to 17% in 2021. In absolute terms there were over 300,000 more residents with Level 3 qualifications or higher in 2021 compared to 2011 (1.1m vs. 0.8m). This in part reflects an expansion of the higher education offering, and the desire of residents to access these opportunities.

The other notable area of growth has been the number of residents pointing to Apprenticeship qualifications, up over 60% between 2021 (c.130,000) and 2011 (c.80,000).

Figure 29: Highest level of qualification - all GM usual residents aged 16 and over



Source: Census 2011 and 2021

Figure 30 shows highest level of qualification index scores for each of the GM local authorities, a measure which is used to rank all local authorities in England and Wales in terms of how qualified their resident population is. Figure 30 points to a strong north vs. south divide in GM, and indicates that Wigan, Bolton, Rochdale, Tameside, and Oldham can all be classed as being in 20% least qualified populations across England and Wales.

Figure 30: Highest level of qualification - Index score rank for England and Wales

District	Qualification index score	Qualification index rank (lowest = 1, highest = 331)	Qualification index percentile
Trafford	2.71	41	88%
Stockport	2.58	94	72%
Manchester	2.51	123	63%
Salford	2.42	176	47%
Bury	2.41	181	45%
Wigan	2.24	264	20%
Bolton	2.22	273	18%
Rochdale	2.19	283	15%
Tameside	2.19	284	14%
Oldham	2.12	306	8%

Source: Census 2021

Census 2021 also showed that there were around 140,000 full-time students aged over 18 with a residential address in GM[14], which represented around 5% of the entire GM resident population. Nearly half of these full-time students aged over 18 lived in the Manchester local authority area.

There were also around 20,000 full-time international students living in GM in 2021, with around 80% (4 in 5) of these living in either the Manchester or Salford local authority areas.

[14] It should be noted that the pandemic caused some disruption to student living during this period.

3.6 Car-keeping by GM residents and its implications

Why does car-keeping matter?

As personal car-keeping increases, the use of public transport and active travel decreases.

Our 2023 Travel Diary Survey data shows that residents with no cars in their households made 84% of their trips by active travel or public transport. While in households where there were fewer cars than adults 37% of their trips were by active travel or public transport. In households where there was at least one car for every adult only 26% of their trips were by active travel or public transport.

Residents in households with no cars were eight times more likely to use a bus for their journeys than residents in households where there was at least one car per adult.

How do our findings impact the pathway to the 2040 Right Mix vision?

Personal car-keeping has been increasing in GM and this represents a major headwind to achieving the 2040 Right Mix vision. It is of particular concern that over the last decade the areas that have seen the greatest growth in private car keepership are typically relatively deprived communities, which have historically been a core aspect of the bus user market. Without intervention there is risk of locking in a vicious cycle (as illustrated in Figure 1) where residents may feel forced into car ownership to access opportunities.

3.6.1 Car availability by residents

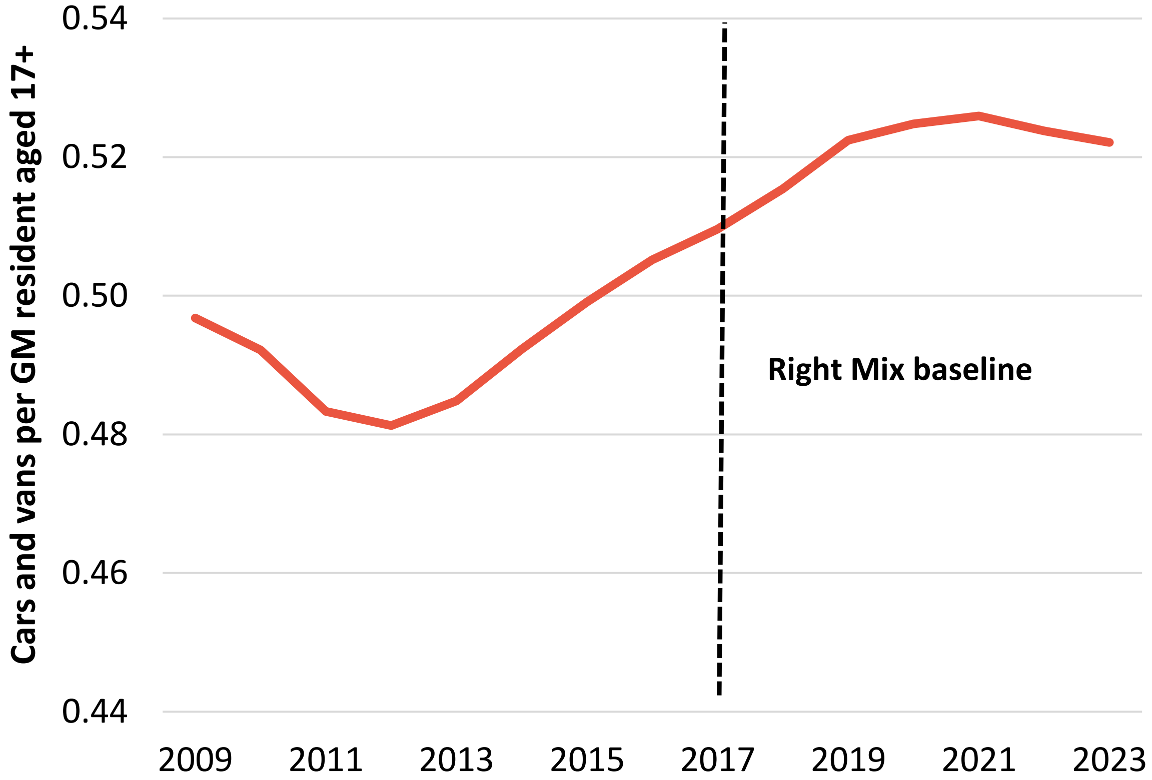
Between 2011 and 2021 the number of registered private cars in GM grew by 13%, exceeding the 7% growth in the GM population. (Sources: DfT Table VEH0105, Census 2011, Census 2021).

In 2023 there were over 1.1m cars being kept privately in GM, which equated to roughly one car for every two residents aged 17 or over. There was also c.70,000 privately kept LGVs.

Figure 31 shows that the number of privately kept cars and vans per GM resident aged 17 or over was rising when the Right Mix baseline was established (2017). After several years of growth, 2021 marked a turning point and there are now early signs of a possible reversal. However, it is too early to tell if this is a longer trend, driven by changing choices, or a short-term response to linked to cost-of-living pressures.

It is notable that there was a lag between the 2007-2008 global financial crisis and the recent 2012 low point for GM cars and vans per head (0.48). Once a car is in private keepership, it is typically both used extensively and kept for multiple years.

Figure 31: Privately kept cars and vans per GM resident aged 17+, 2009-2023



Source: DfT VEH0105 (available at https://www.gov.uk/), ONS Population estimates

Figure 32 shows a breakdown over time by district of the number of privately kept and licenced cars and LGVs, the number of residents aged 17 or over, and how these translate into cars and LGVs per resident aged 17 or over. The following are key observations:

- The number of privately kept cars and LGVs per head increased in every district between 2011 and 2023
- There were over 180,000 more privately kept cars and LGVs in 2023 compared to 2011. This is the equivalent of adding the privately kept cars and LGVs that were in Trafford and Oldham in 2011.
- In 2011 Wigan and Stockport held the highest volume of privately kept cars and LGVs. By 2023 Manchester had overtaken them both by holding nearly 170,000.

- Manchester has the lowest number of privately kept cars and LGVs per resident aged 17 or over. However, it has seen the highest growth in the rate of privately kept cars and vans per resident aged 17 or over between 2011 and 2013.
- Salford and Stockport are showing potentially early signs of the rate in privately kept cars and LGVs per head flattening or even reducing.

Figure 32: Car and LGVs (licenced privately kept) and residents aged 17 or over

	Cars and LGVs (000's licenced privately kept)			Residents aged 17 or over (000's)			Cars and LGVs per resident aged 17 or over		
	2011	2017	2023	2011	2017	2023	2011	2017	2023
Bolton	111	120	130	216	224	233	0.51	0.54	0.56
Bury	81	86	89	146	150	154	0.55	0.57	0.58
Manchester	124	143	167	400	419	457	0.31	0.34	0.36
Oldham	82	89	98	172	180	187	0.48	0.50	0.52
Rochdale	80	89	97	164	168	176	0.49	0.53	0.55
Salford	78	89	99	186	202	226	0.42	0.44	0.44
Stockport	137	145	148	226	232	239	0.61	0.62	0.62
Tameside	88	98	103	174	179	186	0.51	0.54	0.56
Trafford	103	110	112	178	183	185	0.58	0.60	0.61
Wigan	138	150	164	254	259	273	0.54	0.58	0.60
GM	**1,024**	**1,120**	**1,208**	**2,118**	**2,197**	**2,314**	**0.48**	**0.51**	**0.52**

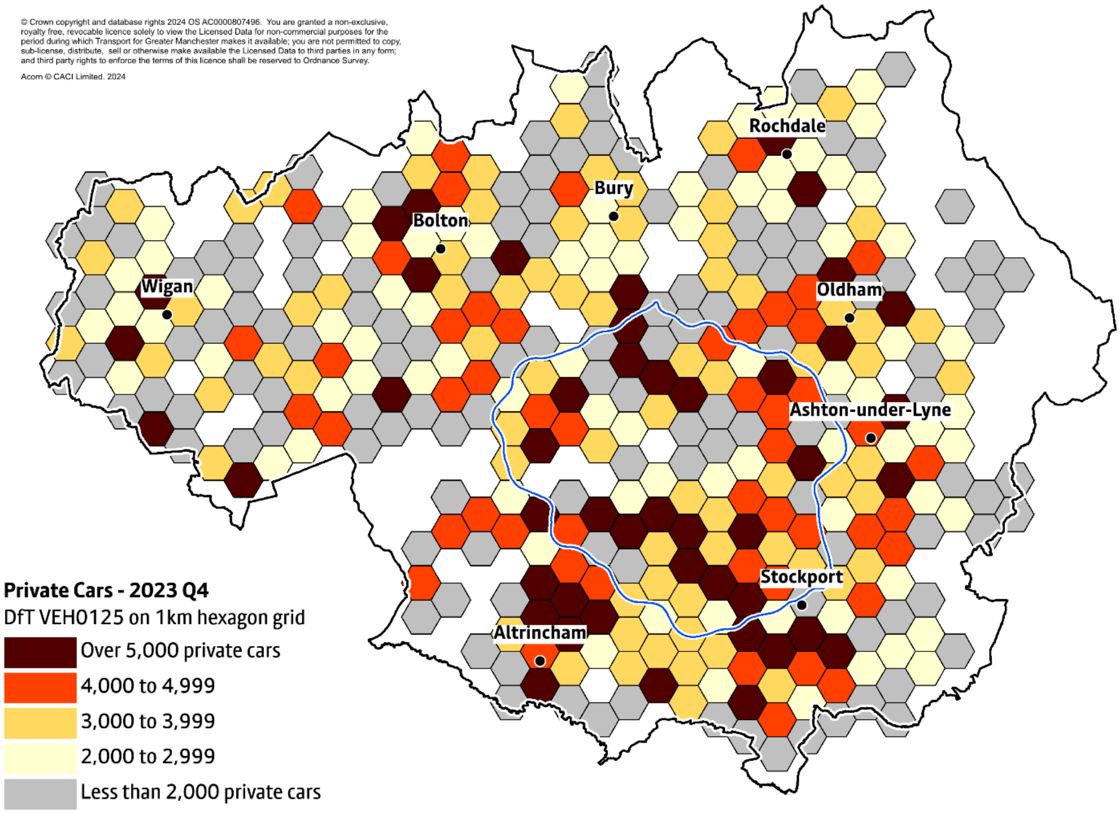
Source: DfT VEH0105 (available at https://www.gov.uk/), ONS Population estimates

Figure 33 shows that there are particularly high concentrations of privately kept cars around the M60, and most notably the south of the GM city-region.

Figure 34 shows private car keeping on a per head basis, which clearly indicates that the areas with highest population density, namely central areas within the M60 and main town centres (see Figure 6), have the lowest private cars per head.

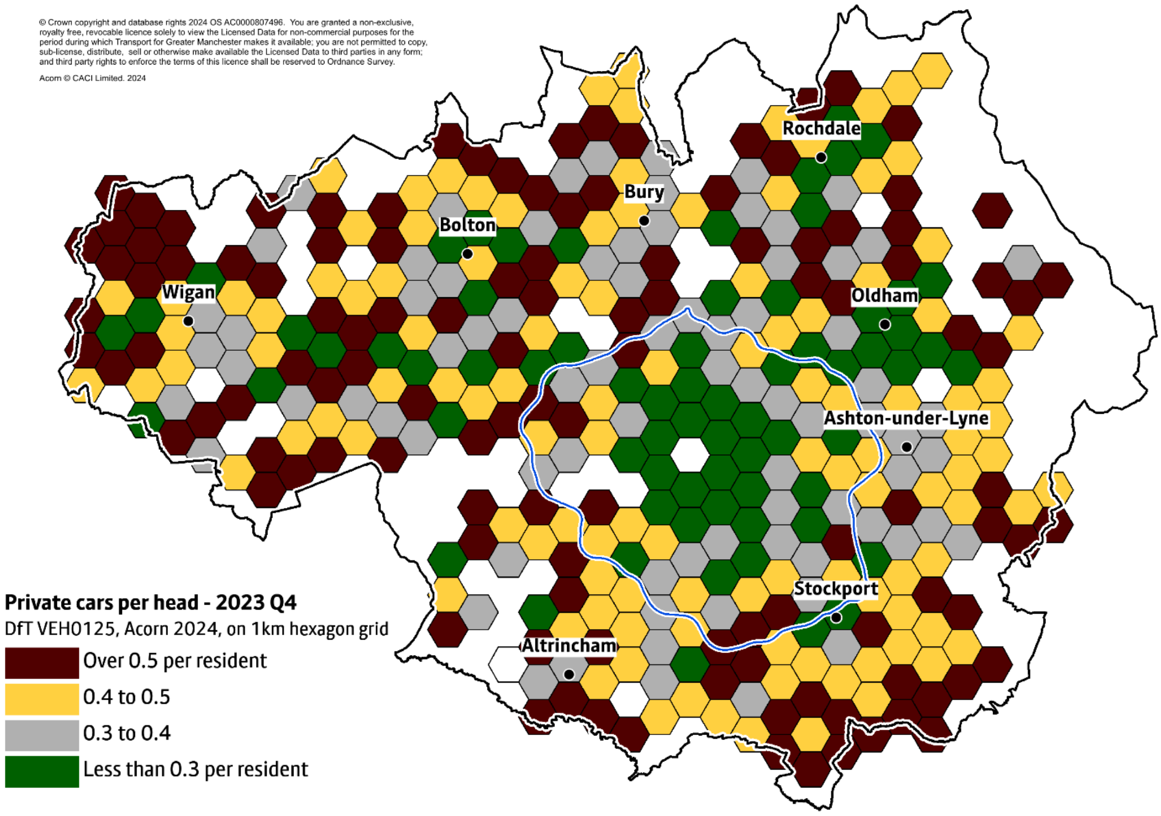
Figure 35 shows that the areas with lowest private cars per head (see Figure 34) have seen the biggest increases in the volume of cars privately kept since 2009 Q4, effectively playing 'catch up'. In comparison, there are only a small number of areas where the volume of privately kept cars has decreased, with these typically being areas with affluent communities where private car-keeping was already very high.

Figure 33: Total Cars in private keepership (2023 Q4)



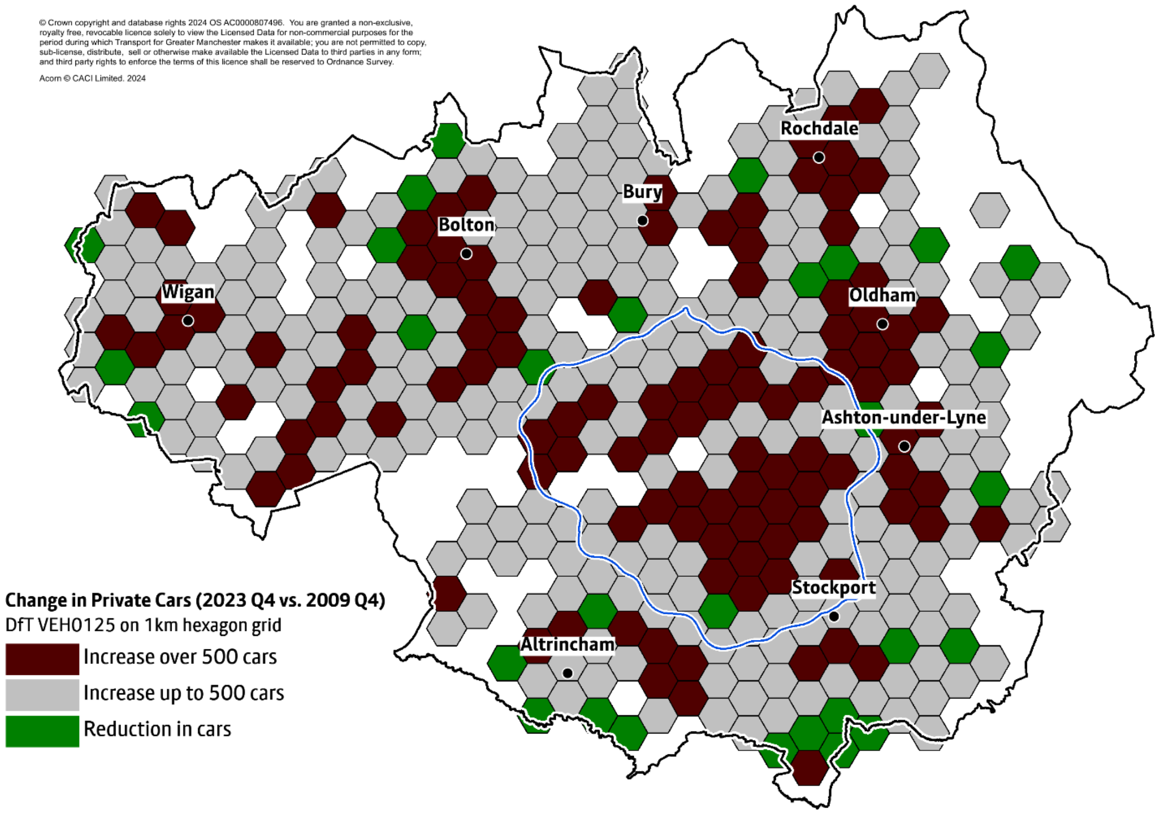
Source: DfT VEH0125 (available at https://www.gov.uk/)

Figure 34: Cars in private keepership per resident (2023 Q4)



Source: DfT VEH0125 (available at https://www.gov.uk/), Acorn 2024 (CACI)

Figure 35: Change in total cars in private keepership (2023 Q4 vs. 2009 Q4)

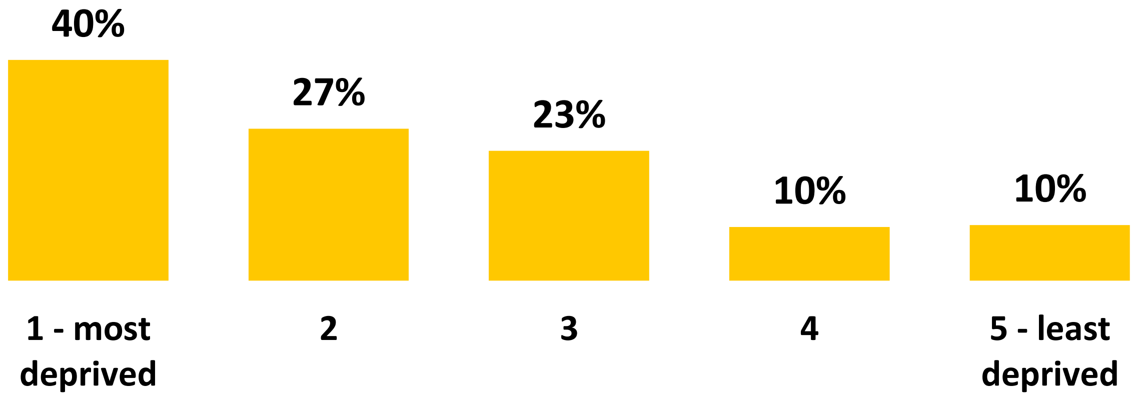


Source: DfT VEH0125 (available at https://www.gov.uk/)

3.6.1 Household level car availability

Figure 36 shows there is a strong relationship between levels of deprivation and the proportion of households without access to a car. Across GM, the most deprived households were four-times more likely to have no access to a car than the least deprived households. Overall, 27% of households had no access to a car, rising to 40% in our most deprived households.

Figure 36: % of households with no access to a car - by English deprivation rank



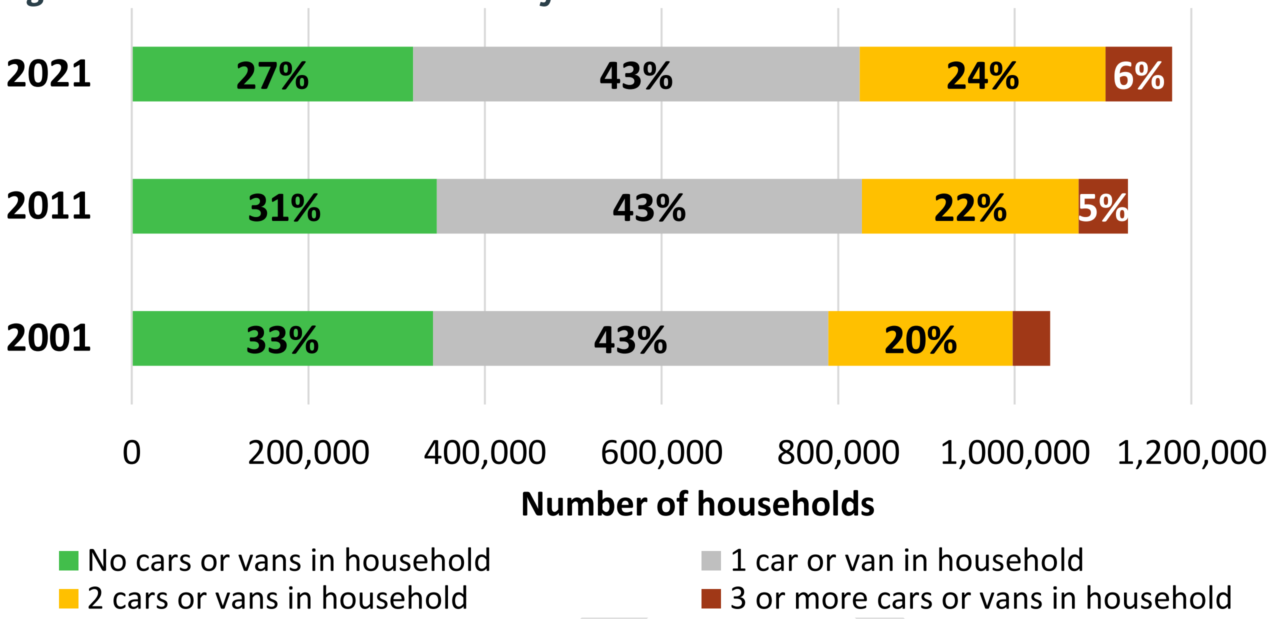
Source: GM TRADS 2022 & English Indices of Deprivation 2019

Figure 37 shows that between 2001 and 2021 both the absolute number and percentage share of households without access to a car or a van decreased. In 2001, roughly 1 in 3 households had no car available, in 2021 this was closer to 1 in 4. In 2021, there were 20,000 fewer households without a car than there were in 2001, while comparison of the same two Census periods showed an increase of 100,000 two or more car households.

Taken together Figure 36 and Figure 37 suggest that the reduction in the absolute volume of no car households is likely to have impacted a significant proportion of deprived households. It is seemingly inevitable that some of these deprived households will have been placed into hardship because they have felt it a necessity to acquire a car.

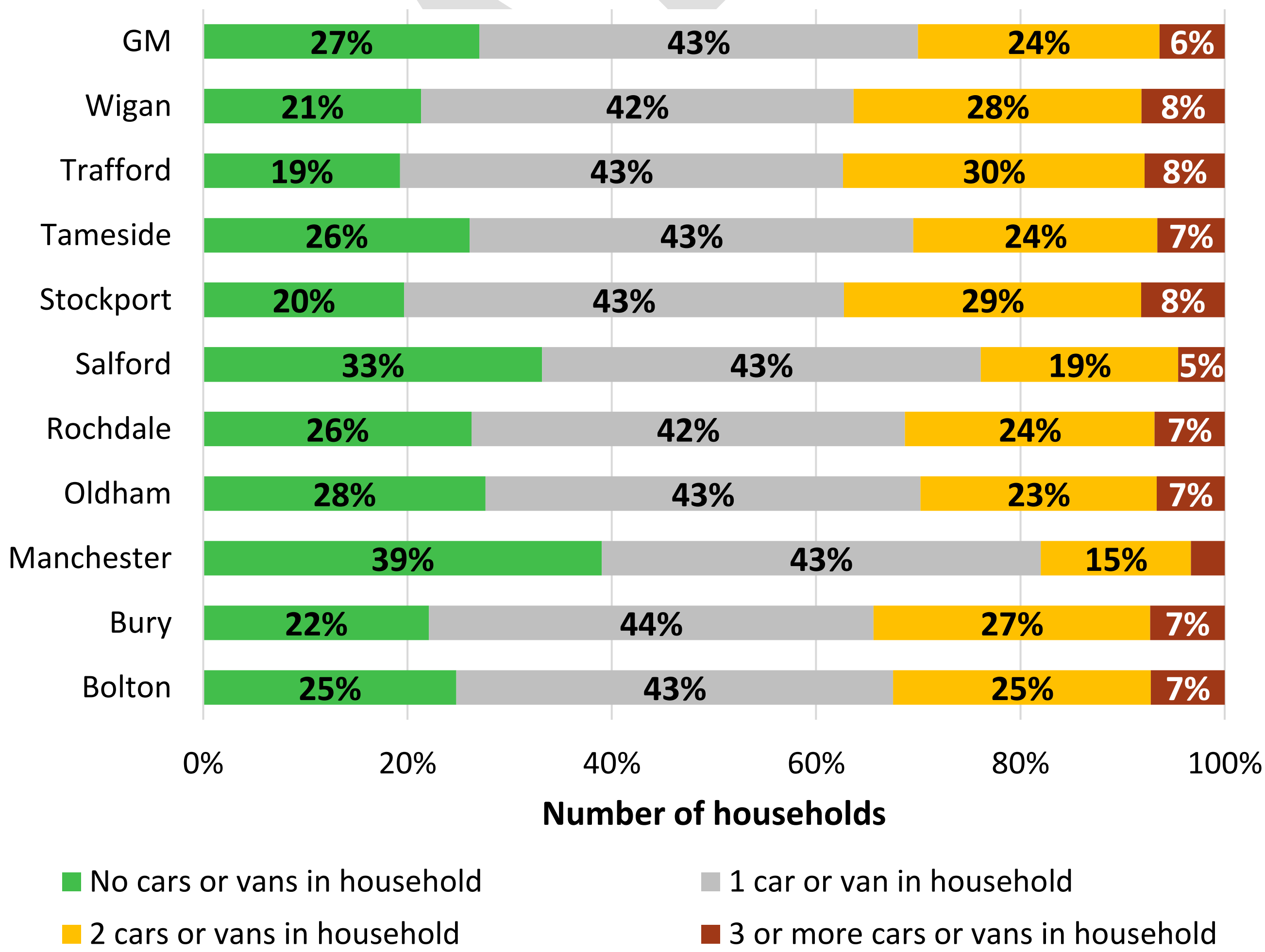
Figure 38 shows how household car availability varied across the GM Local Authority areas. Manchester had the highest proportion of no car households at 39%, with Trafford the lowest at 19%.

Figure 37: Household car availability trends



Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

Figure 38: Household car availability by GM Local Authority (2021)

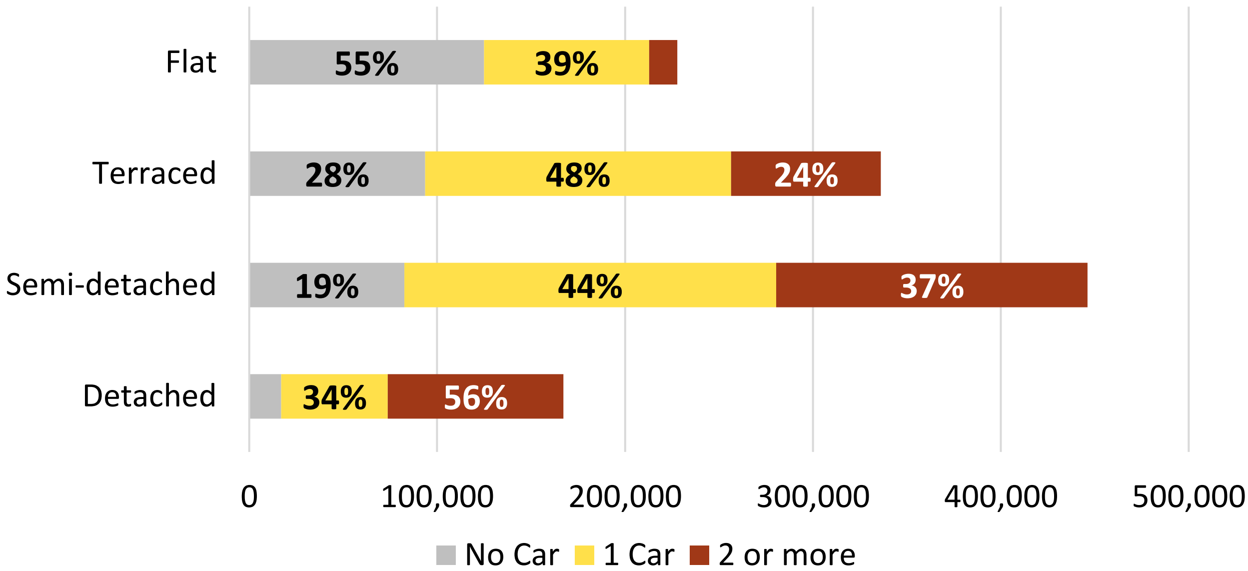


Source: Census 2021 (available at https://www.nomisweb.co.uk/)

Figure 39 shows that in 2021, 10% of detached households had no car, while for flats this was 55%. Conversely, only 7% of flats had two or more cars, in comparison to 56% for detached houses.

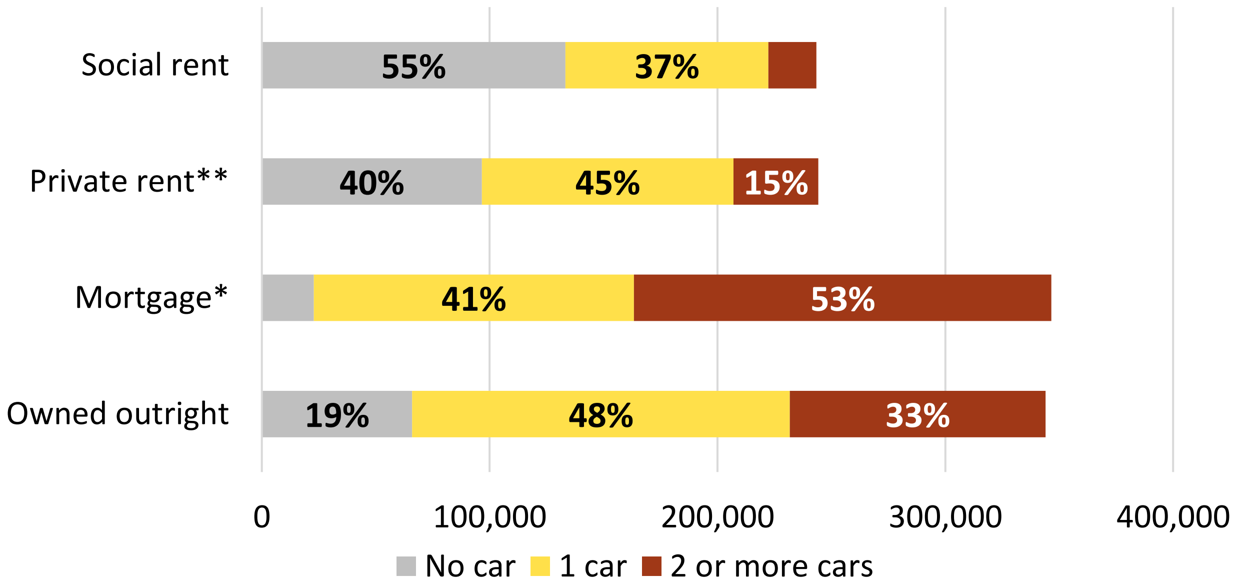
Figure 40 shows that despite only accounting for 29% of all GM households, those owned with a mortgage or loan accounted for over 50% of GM's two or more car households. Only 15% of private rent households (which Figure 16 showed have accounted for an increasing proportion of GM households since 2001) had two or more cars, accounting for 11% of GM's two or more car households. Well over half of social rent households did not have access to a car.

Figure 39: Accommodation type and car availability (2021)



Source: Census 2021 (custom dataset created at: https://www.ons.gov.uk/datasets/create)

Figure 40: Household tenure and car availability (2021)



Source: Census 2021 (custom dataset created at: https://www.ons.gov.uk/datasets/create)

3.6.2 Ultra Low Emission Vehicles (ULEVs)

ULEVs are a relatively new technology within vehicle fleets, and consequently as of 2024 Q4 they accounted for less than 3% of all privately kept vehicles in GM[15]. They are however worthy of a separate section in this document on the basis that their potential to negate some of the negative aspects of private car travel, may see them benefit from external influences to encourage their adoption.

The current rate of growth in ULEV private vehicle registrations has been significant with GM moving from 0.4% at the end of 2019, to 2.8% at the end of 2024 - in absolute terms this translated to a move from around 3,000 vehicles, to around 33,000 vehicles in just a 5-year period. A continuation of growth on this trajectory would soon result in a major shift in the composition of the GM private vehicle market in respect of ULEVs.

There is clear evidence that ULEV adoption to date has not taken place evenly across GM to date. At the end of 2024, Trafford saw 3.5% of its privately kept vehicles classed as ULEVs, while for Tameside this was only 2.0%.

3.7 Approach to supporting future growth of the resident population

The PfE Joint Development Plan targets the delivery of a minimum of 175,000 net additional dwellings over the period 2022-2039. This would represent a 15% increase on the number of households recorded in Census 2021 (note: the same comparison for expected resident population growth was 7%).

Figure 41 provides an overview of residential land supply in GM and includes Stockport which is not subject to the policies of the PfE plan. Figure 41 shows that over half (nearly 110,00) of the residential units in the land supply are attributable to Manchester and Salford. The addition of Trafford, which accounts for over 20,000 units (10% of total residential supply), sees nearly two thirds of the residential land supply associated with the three local authority areas that intersect the Regional Centre.

Figure 41 also shows that around two thirds (nearly 140,000) of the residential units in the land supply are apartments. Rochdale (82%) and Wigan (79%) have the highest proportion of housing units, with Wigan accounting for around 12,000 houses, and Rochdale around 9,000.

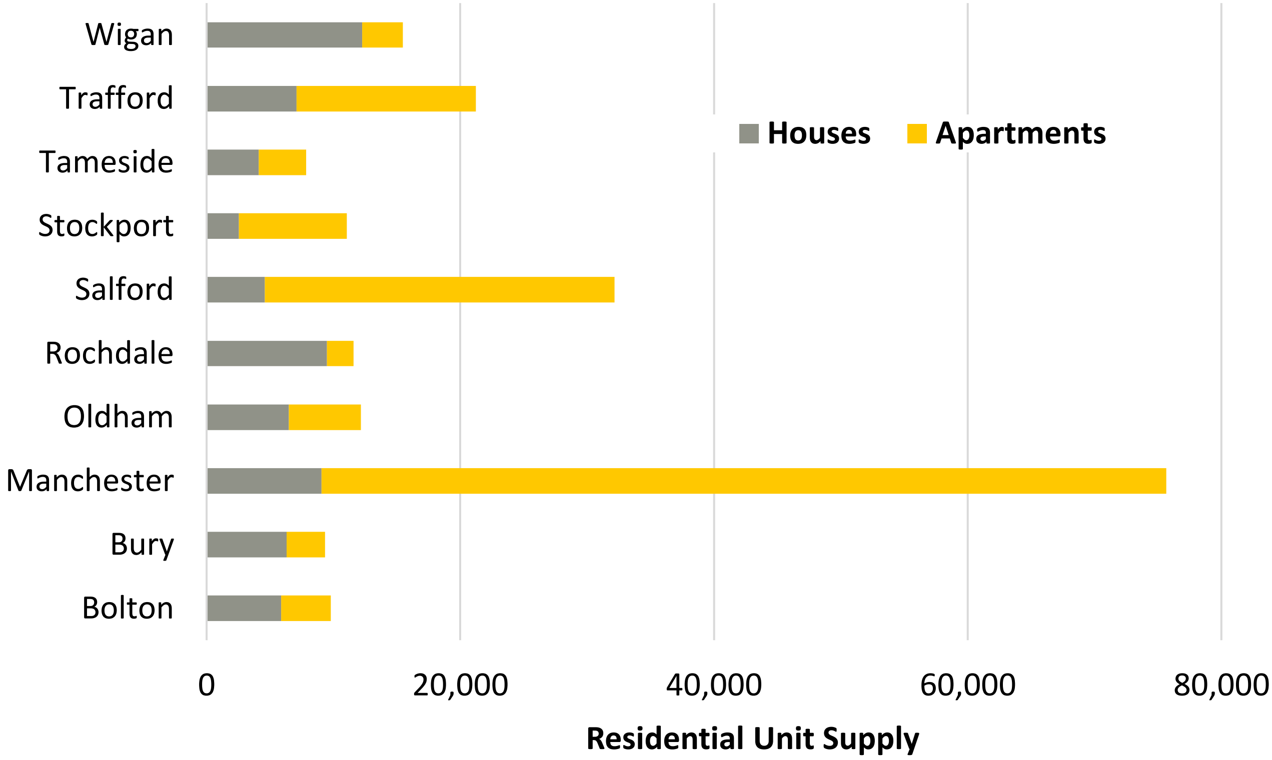
Figure 42 and Figure 43 show the distribution of houses, and apartments respectively. Houses in the land supply are distributed very differently to apartments in the land supply. Apartments are strongly concentrated in the Regional Centre and

[15] DfT Tables VEH0132, and VEH0105

main town centres, while houses are dispersed more widely, but with an emphasis on the north of GM outside the M60.

The different distribution of houses and apartments in the land supply is played out in Figure 44 which shows the volume of each type of residential unit within each of the Greater Manchester Accessibility Levels (GMAL)[16], which indicate the density of the public transport network (the higher the level the denser the public transport provision). Nearly 95% of the apartments in the land supply are in locations with GMAL 5 or above, while for houses nearly 75% are in locations with GMAL 4 or below.

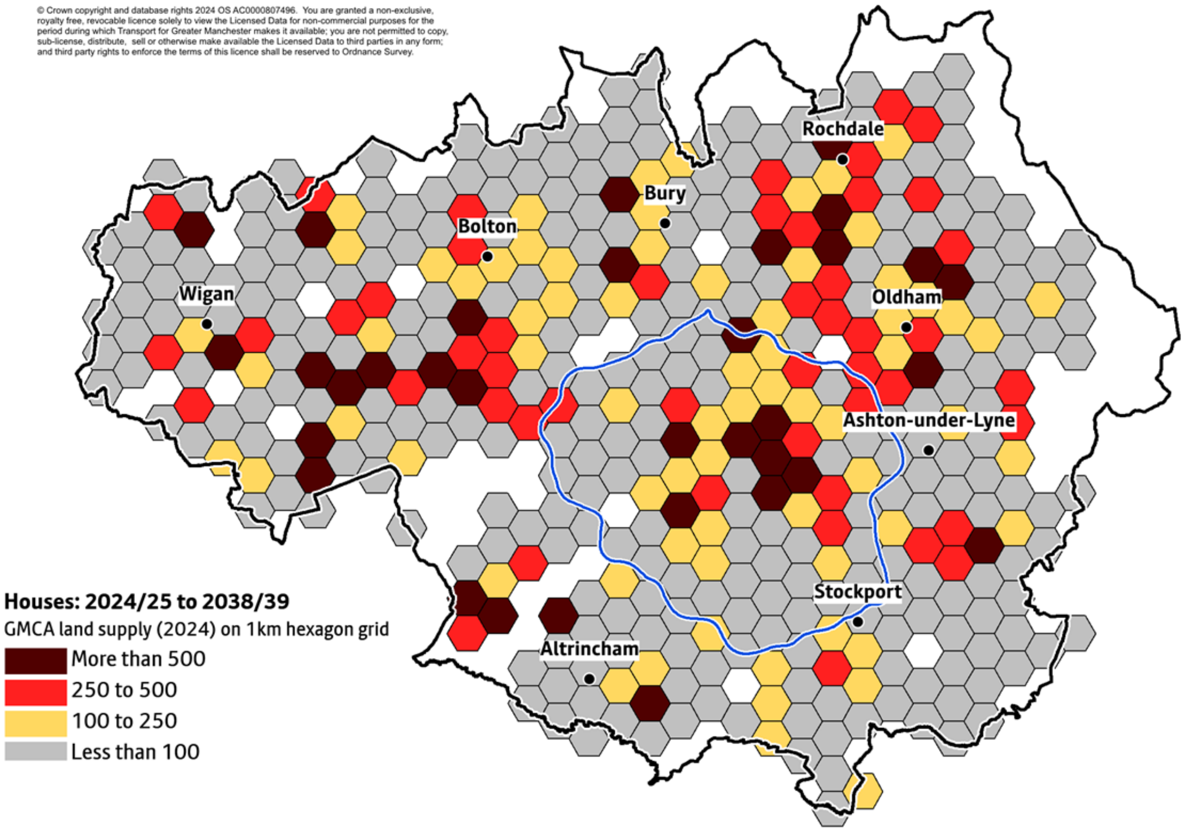
Figure 41: Overview of residential land supply to 2038/39



Source: GM Land Supply 2024 (GMCA)

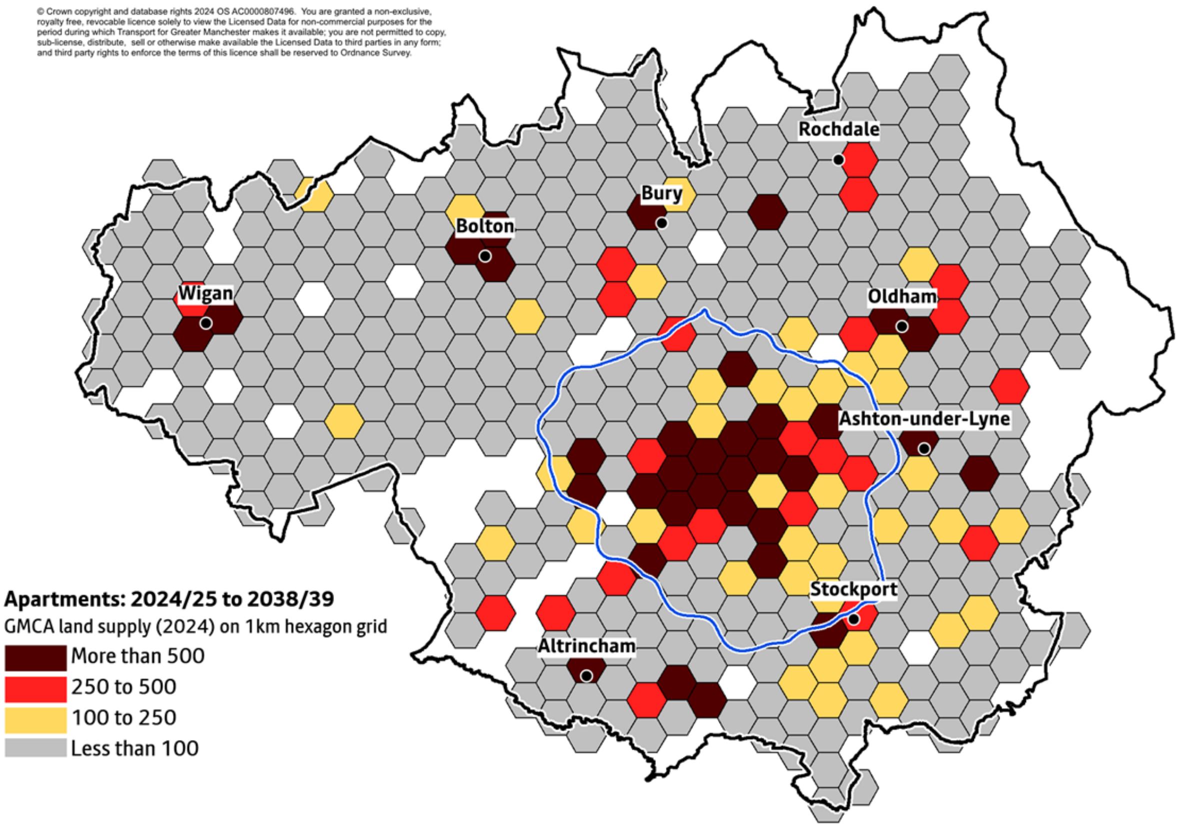
[16] On the 26th June 2025 the DfT published a Connectivity Tool which seeks to help built environment professionals to understand how sustainably located a place is and the transport interventions needed to support it. We will be reviewing the guidance associated with this tool and considering how we can integrate its future use in the context of GM planning and delivery.

Figure 42: Houses in residential land supply to 2038/39



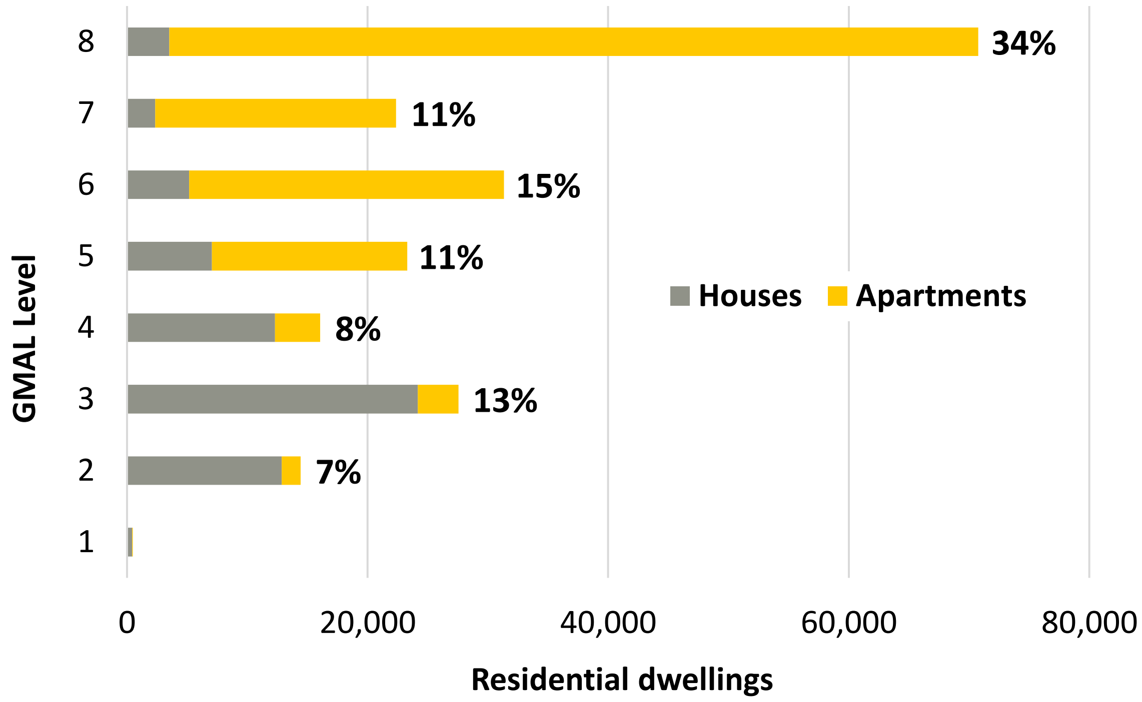
Source: GM Land Supply 2024 (GMCA)

Figure 43: Apartments in residential land supply to 2038/39



Source: GM Land Supply 2024 (GMCA)

Figure 44: Residential land supply to 2038/39 by average GMAL per site



Source: GM Land Supply 2024 (GMCA)

4. Economy and employment evidence overview

4.1 Key Facts Summary - GM economy and employment

How many residents are economically active?

- Around 1.4m residents were economically active during 2023, which represented just over three quarters of all residents aged 16-64.
- During the one-year period October 2022 - September 2023, over 95% of the economically active resident population were in employment.

How many businesses are there in GM?

- There are broadly 105,000 businesses (local enterprises) in GM. The total number of businesses has been relatively stable since 2018, following a period of rapid growth since 2011 when there were a little over 70,000.
- A little under 90% of businesses are micro (no more than 9 employed), with less than 1% large (250 or more employed).

What does the industry profile look like and how has it changed?

- In 2022, over a third of jobs were in IT, financial, real estate, professional, and admin roles - representing over 100,000 more jobs than there were in 2015. This translated to 26% growth, which was well above the overall growth of 15% across all industries.
- Manufacturing, and wholesale and retail have remained largely unchained in absolute terms (together accounting for c.310,000 jobs) between 2015 and 2022, which translated to them representing a smaller proportion of overall employment in 2022 (21%) than they did in 2015 (25%).
- The construction sector while smaller in scale at c.70,000 in 2022, was 34% up on 2015 levels.
- In terms of occupation, the most striking change between 2001 and 2021 was the increase in the proportion of residents working in professional and technical roles to broadly account for 1 in 3 (33%) roles in 2021, up from less than 1 in 4 (23%) in 2001.

How is employment distributed in GM?

- Employment in GM is not evenly distributed. The most notable concentration is in the Regional Centre, which accounts for nearly 20% (nearly 1 in 5) jobs. The main town centres (c.10%), Trafford Park (c.3%), and Manchester Airport (c.2%) also all stand out. Elsewhere the tendency is for employment to be dispersed at relatively low densities.
- In 2022 the distribution of employment was fundamentally different to the distribution of the resident population in GM. There is a distinct north to south divide, with the ratio of residents per job lowest in Manchester (1.3), Trafford (1.4), and Salford (1.7) - local authority areas that intersect the Regional Centre. Those living in the north face greater competition to access employment opportunities within the local authority areas in which they reside (ratios of residents per job are 2.6 or higher)
- Manchester and Salford (the local authority areas that capture the vast majority of the Regional Centre) have accounted for an increasing proportion of GM GVA over the period from 1998 (36%) to 2022 (46%).

Working from home?

- In the final quarter of 2022, around 50% of respondents to the GM Residents Survey indicated that they had worked from home at least some of the time.
- National data for the same period indicates the proportion of homeworkers to be closer to 40%, and it is possible that the GM Residents survey methodology (which saw around 50% of the 1,470 respondents being captured by the web) resulted in some bias. Nevertheless, it was clear that the pandemic had resulted in rapid transformational change.
- At a national level during the period September 2022 to January 2023, over 50% of administrative, professional, and senior roles of workers had worked at home for at least one day in the previous week, while for elementary, and process plant and machine operatives this was 10% or lower.
- At a national level during the period September 2022 to January 2023, only 10% of those earning £50,000 or more indicated that they could not work from home, while for those earning less than £20,000 this was well over 60%.

Deep dive 1: Regional Centre trends and implications

The high growth potential of the Regional Centre, combined with it being the focal point for the existing GM public transport network, prime it for delivering high quality public transport services in a financially sustainable manner.

- This makes the performance of the Regional Centre particularly important to achieving the Right Mix vision, which will require more GM residents to adopt low car use lifestyles than is currently the case.
- At the core of the Regional Centre is the City Centre, which was simultaneously seeing both continued growth in overall demand, and a reduction in the absolute volume of car trips prior to the onset of COVID-19.
- The City Centre saw rapid growth in rail-based modes between 2009 and 2019. This helped support the increasing proportion of GM GVA that is accounted for by Manchester and Salford, by helping the City Centre to attract businesses, and helping people access the employment opportunities that arise from that.
- As travel demand fell following the onset of COVID-19, it is noticeable that the proportion of trips to the City Centre made by car increased. It represents a major success for the attractiveness of public transport for accessing the City Centre that the 2023 car mode share of 24%, was the same as recorded for the 2015-2017 period when overall demand was 30% higher.

Deep dive 2: Comparison goods shopping trends and implications

- The mode share of shopping trips varies by retail location type. Between 2017-2019 c.10% of city centre shopping trips were by car, whereas for retail parks this was 85%.
- Between 2010 and 2024 retail parks doubled their share of the comparison goods market, while the city centre saw its share reduce by a third, and the main town centres lost a quarter of theirs. This means that these shopping trips can be expected to now have a considerably higher car mode share than was the case in 2010.

Visitor economy

- By 2022 the economic value of tourism activity in GM had already recovered strongly to reach around 90% of pre-pandemic levels.
- Activity is particularly concentrated within Manchester which accounts for over 50% of both economic value and jobs.
- 2024 passenger activity at Manchester Airport surpassed that of 2019, and there is an aim to double it by 2050. Around 75% of passengers access Manchester Airport either as a car driver or passenger (incl. taxi).

4.2 Economic activity

Why do economic activity rates matter?

Our 2023 Travel Diary Survey data shows us that residents in employment typically make more trips per day than the average.

It also shows that 90% of households with a person(s) in full-time employment have at least one car available. This is considerably higher than the rate across all GM households which is around 75%. Only around 60% of households with individuals who are either unemployed, or long-term sick or disabled have at least one car.

A combination of a growing resident population and increases in economic activity rates has the potential to lead to challenges on the transport network.

We expect to see an increase in the number of people employed in GM and we need a transport network that can support this in an increasingly sustainable way to maximise the growth potential of GM.

How do our findings impact the pathway to the 2040 Right Mix vision?

In the context of overall transport supply the reported declines in economic inactivity rates in GM during the pandemic were relatively modest and by the end of 2023 they had returned to pre-pandemic levels. This suggests there is no specific reason to the adapt the pathway. There is however strong evidence of a link between economic activity rates and travel outcomes, which means we will continue to monitor economic activity rates across GM.

Around 1.4m residents were economically active during 2023, which represented just over three quarters of all residents aged 16-64 (Source: ONS annual population survey).

Following the global financial crisis of 2008, the GM economically active rate hit a low of c.73% in 2011, with it peaking at nearly 77% just before the pandemic took hold in 2020. The pandemic resulted in a dip to around 75%, prior to a recovery towards pre-pandemic levels throughout 2023 (Source: ONS annual population survey).

During the one-year period October 2022 - September 2023, over 95% of the economically active resident population were in employment (Source: ONS annual population survey).

4.3 Profile of businesses and employment

Why does the profile of businesses and employment matter?

It's not just the overall scale of business and employment activity that impacts travel outcomes. The size of individual businesses can influence aspects that impact their worker(s) travel such as their location, support with travel options eg provision of car parking, the availability of shower facilities etc.

As is demonstrated in Figure 55 some occupations support a greater level of homeworking than others. It therefore stands to reason that an economy which is seeing comparatively stronger growth in these industries will see travel patterns change, if all else stays equal.

We also know that higher paid roles support longer distance travel.

How do our findings impact the pathway to the 2040 Right Mix vision?

Since 2017 there is no evidence of any significant change in the proportion of employment in relation to business size (measured by employees) changing. There is however evidence of a shift towards a greater proportion of employment in professional roles which are strongly concentrated in the Regional Centre. This is a trend that supports trip redistribution from the Wider City Region to the Regional Centre, and with it the Right Mix targets.

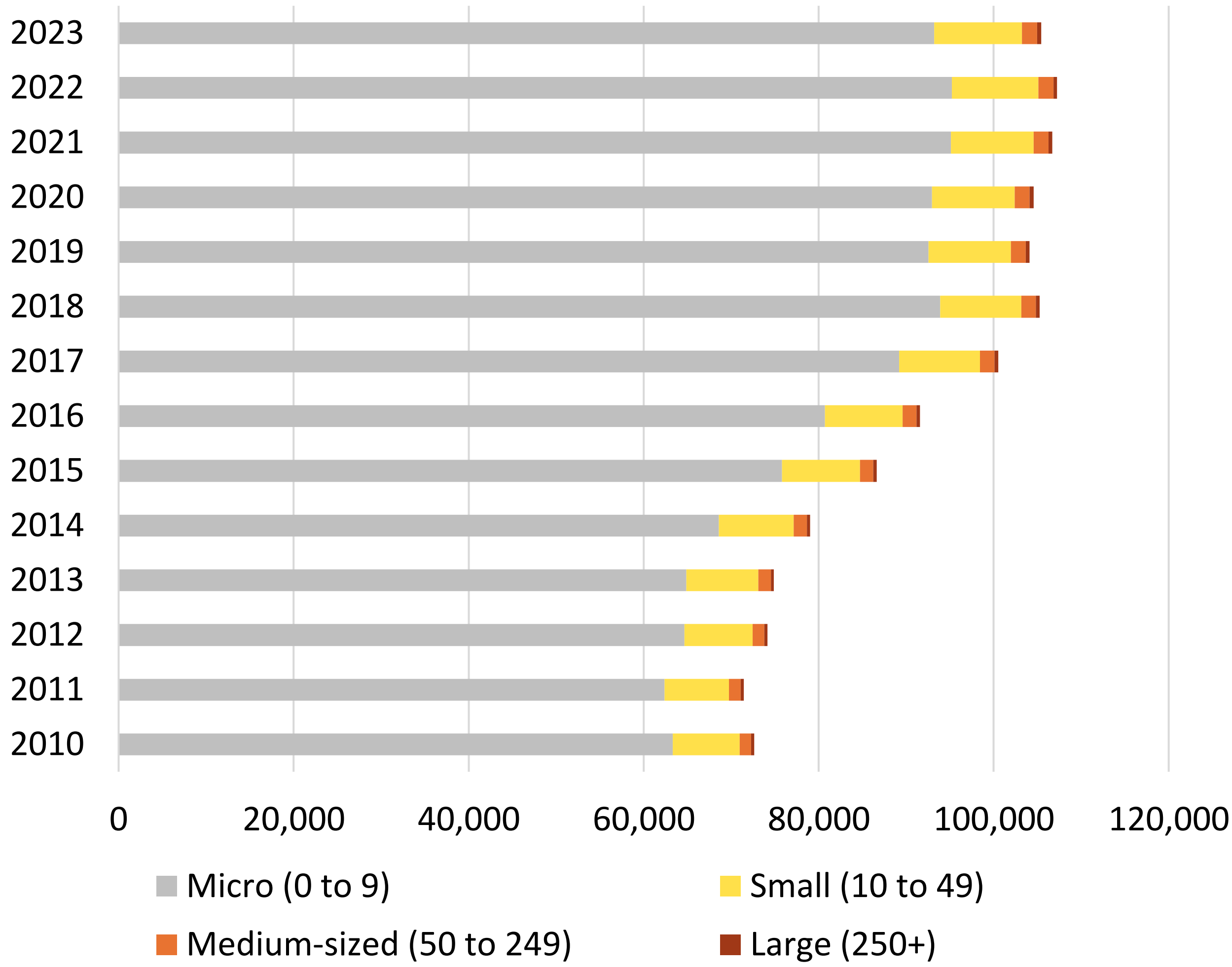
Figure 45 shows that since 2018, there has been broadly 105,000 businesses (local enterprises) in GM. This follows a period of rapid growth since 2011 when there were a little over 70,000[17]. A little under 90% of businesses are micro (no more than 9 employed), with less than 1% large (250 or more employed).

Data showing the total employees by business size of employees is not available for GM. UK data[18] shows that despite accounting for 99% of businesses, small businesses (those which employ 49 or less) accounted for only 48% of employment. At the other

[17] In 2015, ONS extended the coverage of businesses to include a population of solely PAYE based businesses that were previously excluded because of the risk of duplication.
[18] Business population estimates for the UK and regions 2023: statistical release - GOV.UK (www.gov.uk)

end of the scale, large businesses (those which employ 250 or more) accounted for only 0.1% of businesses but 39% of employment.

Figure 45: GM businesses (local enterprises) by employment size band



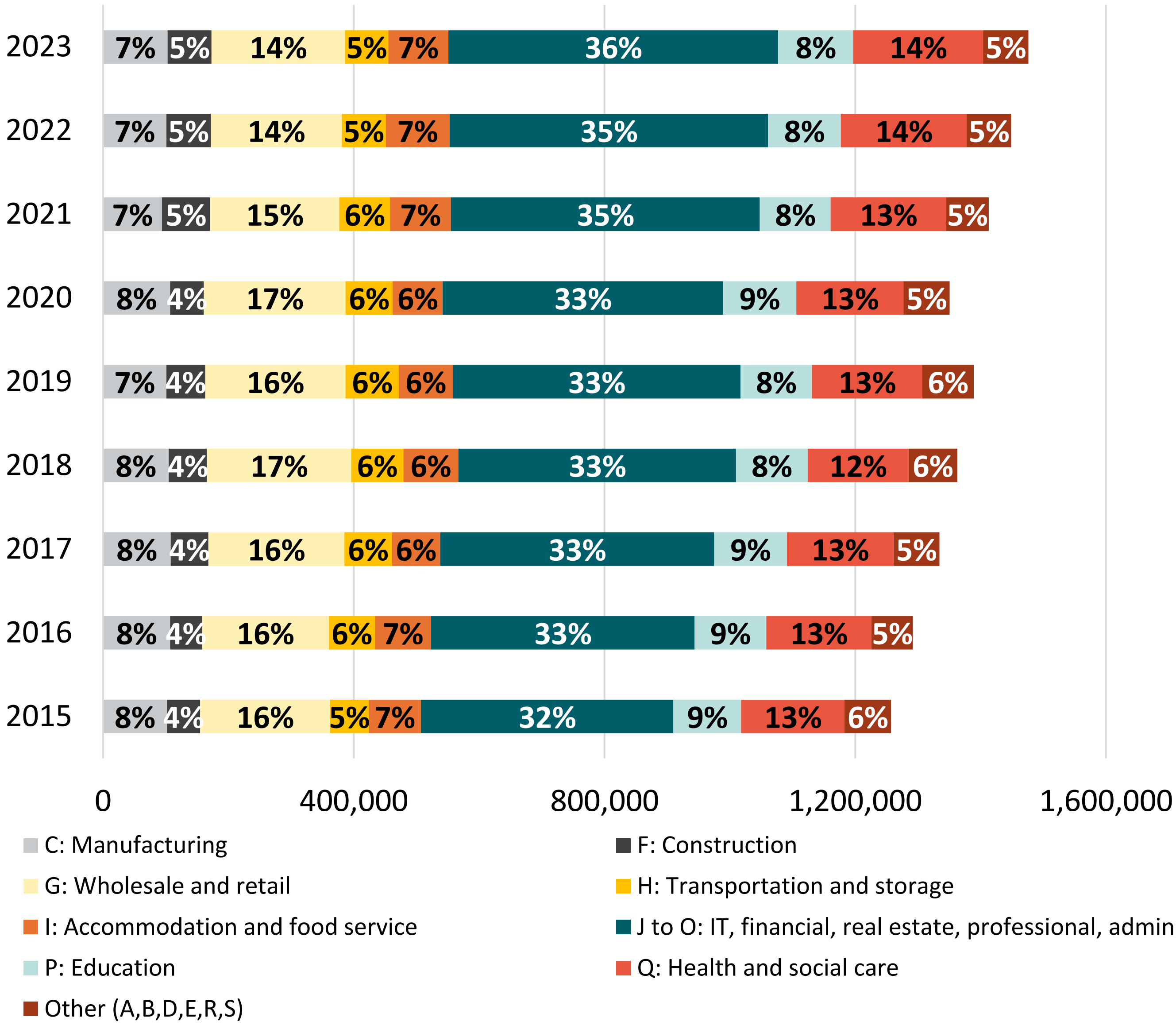
Source: Inter Departmental Business Register (ONS) (available at https://www.nomisweb.co.uk/)

Figure 46 shows that the total volume of employment in GM has increased from 1.26 million in 2015 to 1.48 million in 2023, an increase of 17%. Amidst this backdrop of overall employment growth there have been changes in the industry share also.

Manufacturing, and wholesale and retail have remained largely unchanged in absolute terms (together accounting for a little over 300,000 jobs) between 2015 and 2022, which translated to them representing a smaller proportion of overall employment in 2023 (21%) than they did in 2015 (25%).

In 2023, over a third of jobs were in IT, financial, real estate, professional, and admin roles - representing over 120,000 more jobs than there were in 2015. This translated to 31% growth in these industry sectors, which was well above the overall growth of 17% across all industries. The construction sector employed c.70,000 in 2023, which was 32% up on 2015 levels. These findings suggest a recent realignment of the GM economy towards knowledge intensive services.

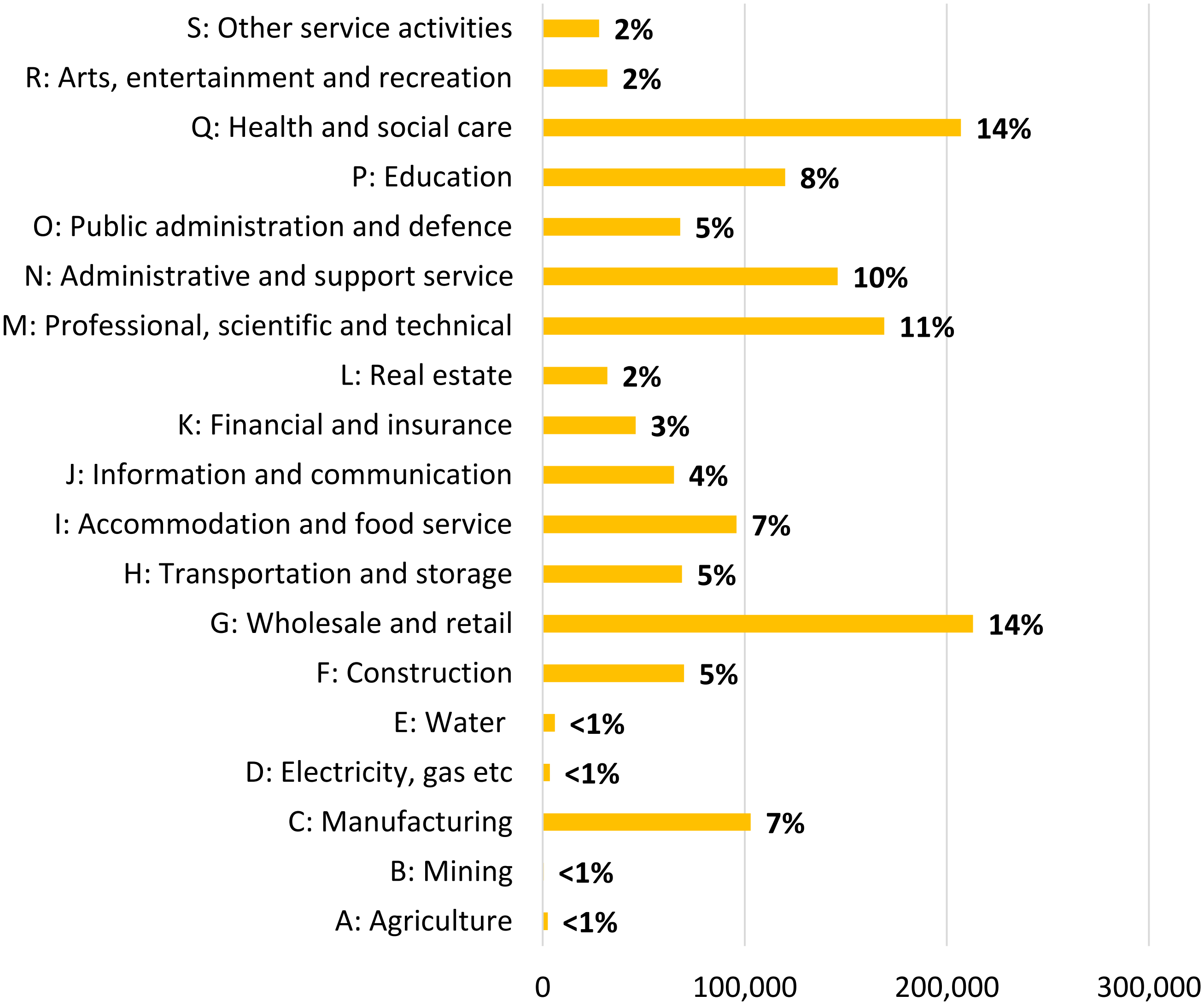
Figure 46: Trends in employment by custom industry groupings (2015-2023)



Source: Business Register and Employment Survey (ONS) (available at https://www.nomisweb.co.uk/)

Figure 47 shows for 2023 only, the full breakdown of GM employment by individual industry. Despite its proportional decrease as shown in Figure 46, wholesale and retail remained the single biggest industry in employment terms accounting for c.210,000 (14%) jobs. The second largest was health and social care which accounted for c.200,000 (14%) jobs. Outside of IT, financial, real estate, professional, and admin roles, the most notable industries in employment terms were education c.120,000 (8%), accommodation and food service c.100,000 (7%), and manufacturing c.100,000 (7%).

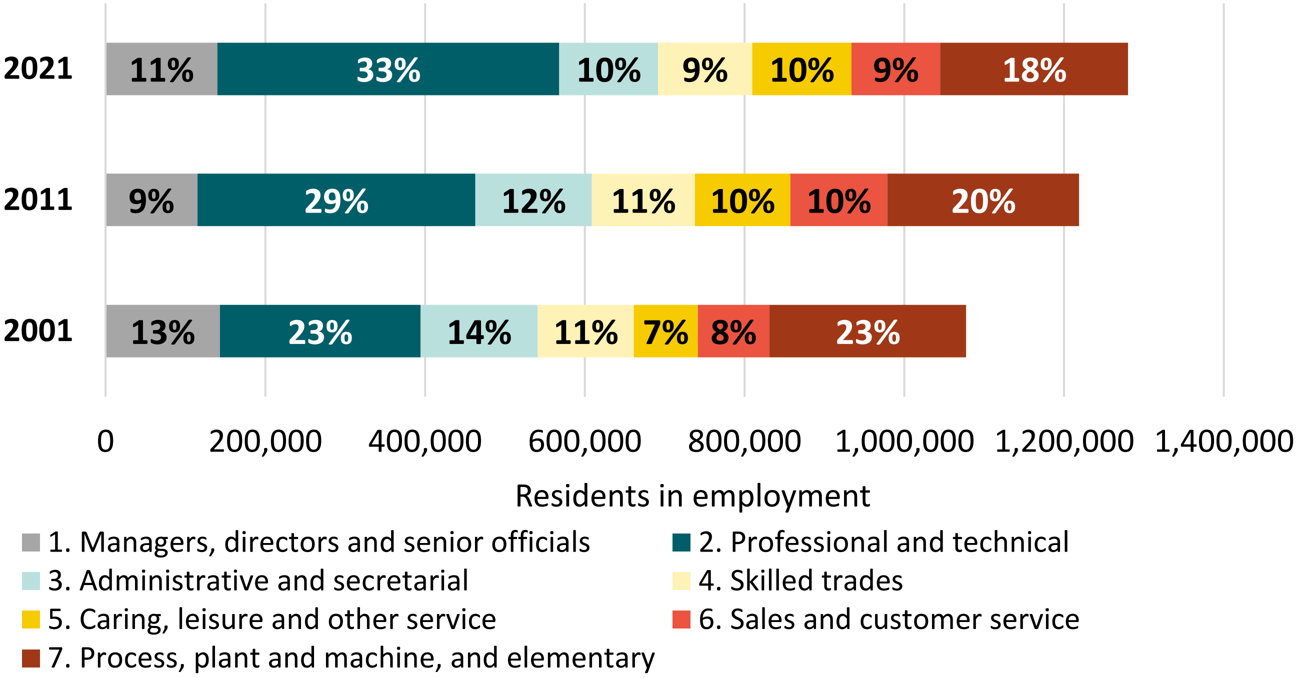
Figure 47: Employment by industry - full breakdown (2023)



Source: Business Register and Employment Survey (ONS) (available at https://www.nomisweb.co.uk/)

Figure 48 shows changes in the occupation profile of GM residents aged 16 years and over between 2001 and 2021. The most striking change was the increase in the proportion of residents working in professional and technical roles to broadly account for 1 in 3 (33%) roles in 2021, up from less than 1 in 4 (23%) in 2001. The second largest occupation group in 2021 was process, plant and machine, and elementary which accounted for c.235,000 roles (18%), but this was down in both absolute (c.245,000) and proportional terms (23%) from 2001.

Figure 48: Trends in occupation



Source: Census 2001, 2011, 2021 (available at https://www.nomisweb.co.uk/)

4.4 Distribution of employment

Why does the distribution of employment matter?

High-density concentrations of employment are better suited to supporting high quality alternatives to the private car than low density. This is because high-density employment results in high demand which can't be efficiently accommodated through the transport network by predominantly single-occupancy private car use.

High-density concentrations of employment tend to become attractive to potential investors / developers which in turn supports higher land values that constrain car parking availability, and therefore supports low car use lifestyles.

Our 2023 Travel Diary Survey data demonstrates this by showing that the Regional Centre spatial theme accounts for over 50% of all (not just commuting) rail and Metrolink trips by GM residents.

How do our findings impact the pathway to the 2040 Right Mix vision?

There is clear evidence that the Regional Centre has become increasingly important to GM in terms of both employment and GVA. This is a positive in respect of delivering our Right Mix targets. The majority of employment in GM however is located outside the Regional Centre and main town centres and dispersed at relatively low densities. This is reflected by the fact that nearly half of all commuting trips by GM residents in 2023 were Wider City Region trips - a spatial theme where around 9 in 10 trips are made by car.

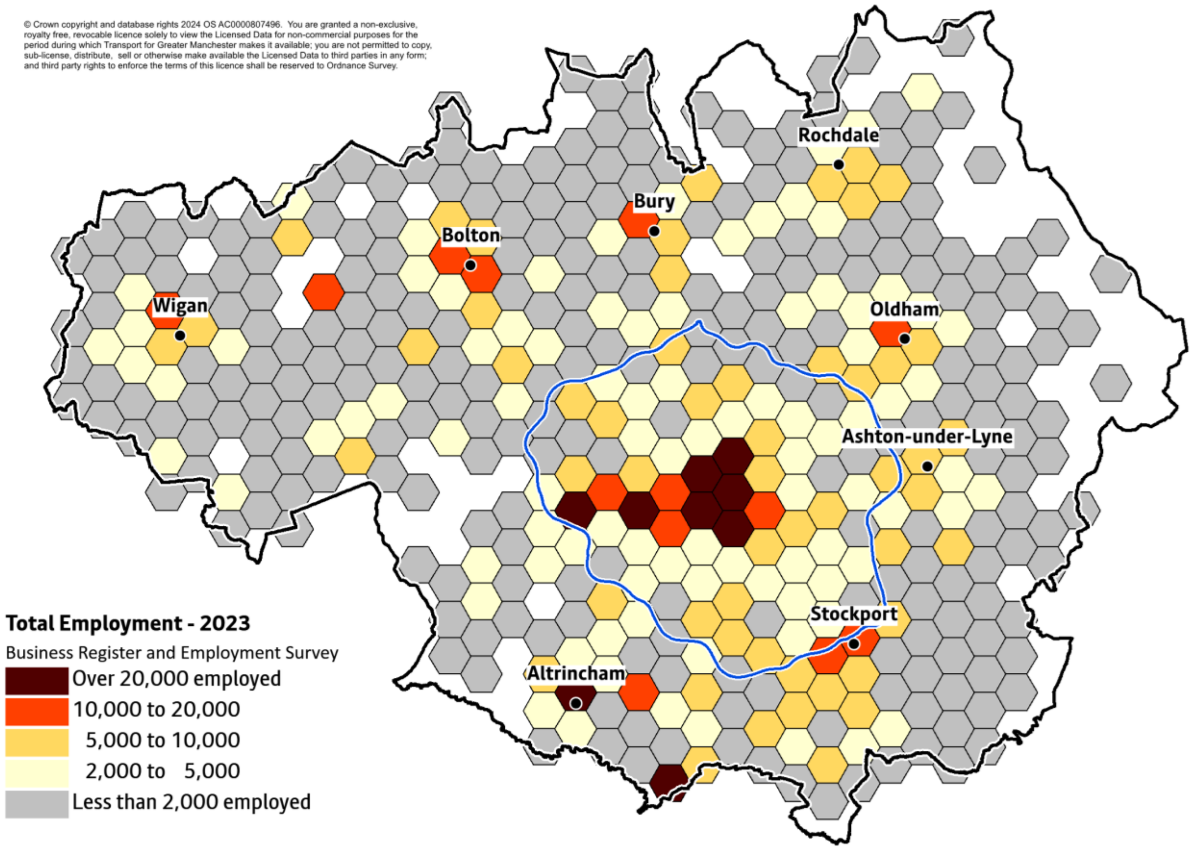
Figure 49 shows that the distribution of employment across GM is not even. The most notable concentration of employment is in the Regional Centre, which in 2023 accounted for over 300,000 jobs, an increase of over 40% on the 215,000 of 2015[19]. For context, the remainder of GM saw employment rise by 12% over the same period. In terms of the share of overall GM employment, in 2023 the Regional Centre accounted for 21% (over 1 in 5) of jobs, up from 17% in 2015.

Figure 49 uses data which is imperfect for representing locations in which there are high concentrations of employment and low volumes of residents. In very broad

[19] This is an increase in employment registered within the Regional Centre, which needs to be interpreted in the changes in the extent of working form home that are discussed in Section 4.5.

terms however, the main town centres account for <10%, Trafford Park c.3%, and Manchester Airport c.2%. Elsewhere the tendency is for employment to be dispersed at relatively low densities.

Figure 49: Total employment (2023)



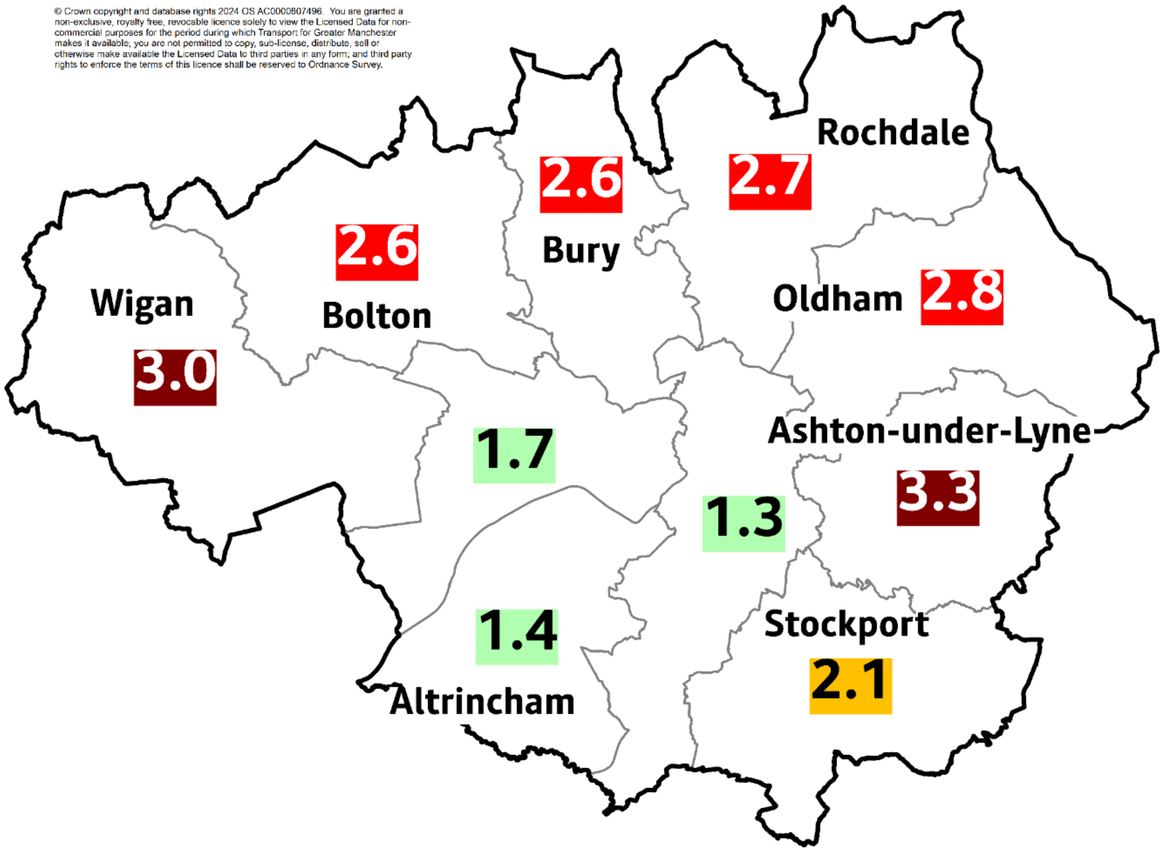
Source: Business Register and Employment Survey (ONS) (available at https://www.nomisweb.co.uk/)

Figure 50 uses local authority area boundaries to illustrate how the distribution of employment in 2023 was fundamentally different to the distribution of the resident population in GM. Figure 50 shows how there is a distinct north to south divide in GM, with the ratio of residents per job lowest in Manchester (1.3), Trafford (1.4), and Salford (1.7) - local authority areas that intersect the Regional Centre. Those living in the north of GM face greater competition to access employment opportunities within the local authority areas in which they reside (ratios of residents per job are 2.6 or higher). Figure 50 does not consider the quality of employment opportunities.

Figure 51 shows how Manchester and Salford (the local authority areas that capture the vast majority of the Regional Centre) have accounted for an increasing proportion of GM GVA over the period from 1998 (36%) to 2022 (46%).

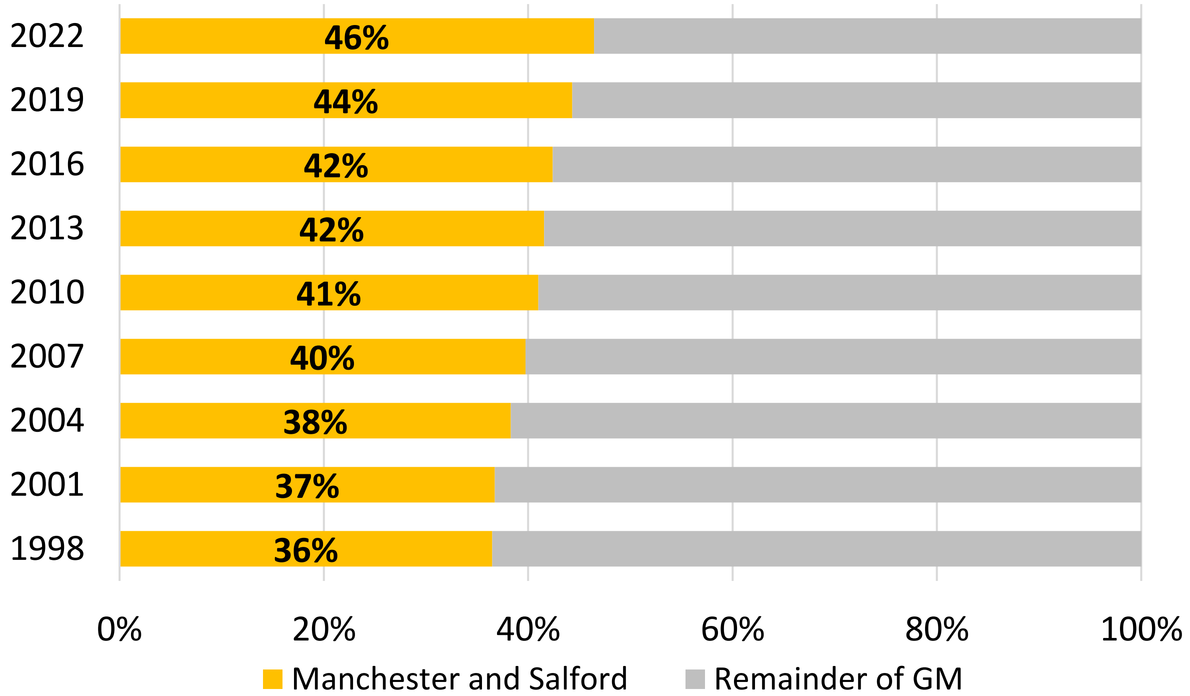
Together Figure 50 and Figure 51 point to transport having an increasingly important role to play in connecting GM residents with employment opportunities.

Figure 50: Residents per job by GM local authority (2023)



Source: Business Register and Employment Survey (ONS) (available at https://www.nomisweb.co.uk/), and Mid-Year population estimates 2023

Figure 51: GM GVA contributor - simplified breakdown



Source: Regional gross value added (balanced) by industry: all ITL regions (ONS)

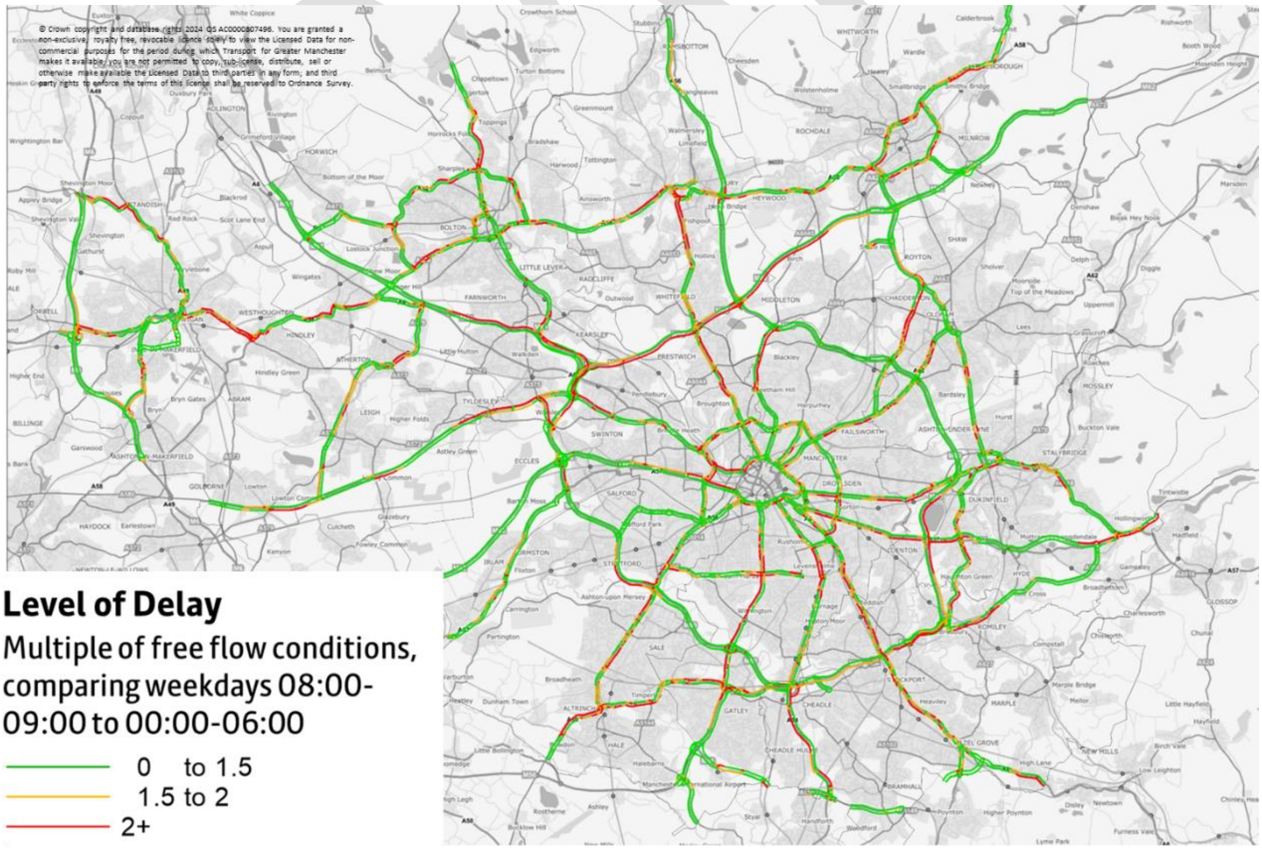
The highway network in GM has been the subject of traffic pressures for many years now. In 2015, TfGM estimated the total annual cost to Greater Manchester's economy of congestion and delay to be £1.3 billion, which in today's prices exceeds £1.6 billion.

Figure 52 shows the areas in greatest variation in highway journey times across important highway corridors on Greater Manchester's Local and Strategic Road Network, demonstrating where our streets typically become most congested during peak periods of travel. Levels of delay are particularly significant on many of our radial transport corridors to the regional centre, and orbital corridors between our key town centres.

Furthermore, on our Strategic Road Network, some of the most significantly congested stretches reflect movement for people and goods traveling East-West. Here, investment in alternative City-to-City, rail-based solutions provide an excellent opportunity to deliver mode shift and economic redistribution.

Achieving Right Mix would enable Greater Manchester to continue growing GVA, by prioritising finite highway capacity for businesses and residents that need it most, ensuring highway congestion is not a brake to GM's continued growth.

Figure 52: GM Average Highway Delay - Primary Road Network (2023)



Source: Highway journey times, Inrix UK Ltd (2023)

4.5 Trip rate trends and the rise of working from home

Why do trip rate trends matter?

The increased prevalence of homeworking is one of the most notable long-term changes to result from the COVID-19 pandemic. While the relative volume of homeworking has reduced from the peaks associated with government restrictions, it remains a far larger market than it was pre-pandemic.

The impact on travel patterns has been complex. On one hand, less commuting has the potential to affect the viability of public transport, which depends on high demand to provide attractive and financially sustainable services. But a reduction in time spent commuting has the potential to support more travel for other purposes such as leisure and shopping, which may involve travelling to different locations than would have previously been the case.

The accelerated adoption of digital activity during the pandemic has impacted other purposes beyond commuting and business, with online shopping and socialising with friends impacting trip rates.

How do our findings impact the pathway to the 2040 Right Mix vision?

Those employed in professional occupations are much more likely than average to work from home on a regular basis. We also know that the proportion of GM employment in professional occupations has been increasing, with their being particular emphasis on the Regional Centre.

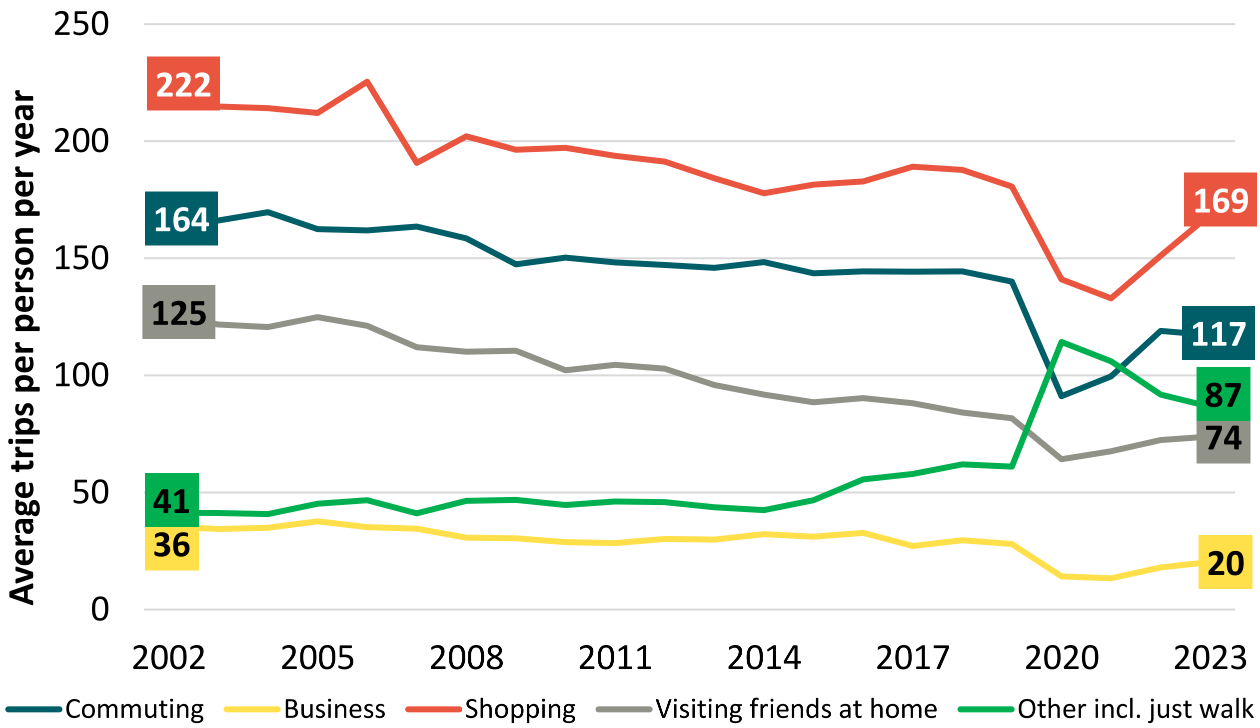
When the current pathway to the 2040 Right Mix Vision was set out the trend towards increased homeworking was much more gradual. We therefore need to review how to adapt the pathway to better reflect increased homeworking, noting that many employers are still adjusting.

We also need to reflect the fact that the opportunity to incorporate homeworking into a lifestyle increases as incomes rise. This has a range of potential implications for our ambition to deliver a fairer GM.

Figure 53 uses national data for England to demonstrate that prior to the onset of the pandemic in 2020, there was a long-term picture of decline in the trip rate for several key purposes. In 2023, following a period of recovery from the pandemic, average trips for all purposes except other including just walk were lower than in 2019.

Across all purposes, the number of trips per person per year has dropped 1,074 in 2002, to 915 in 2023, a reduction of 15%. Business (-43%), Visiting friends at home (-41%), Commuting (-29%), and Shopping (-24%) have all seen above average reductions for the corresponding period. In contrast, the purpose of other including just walk rose 110% between 2002 and 2023. While not shown on Figure 53 it is worth noting that trips for attending education have held relatively stable between 2002 and 2023.

Figure 53: Trips per person per year by selected purposes: England, 2002 to 2023



Source: National Travel Survey (DfT) (available at NTS 2023: Trips by purpose, age, mode and sex)

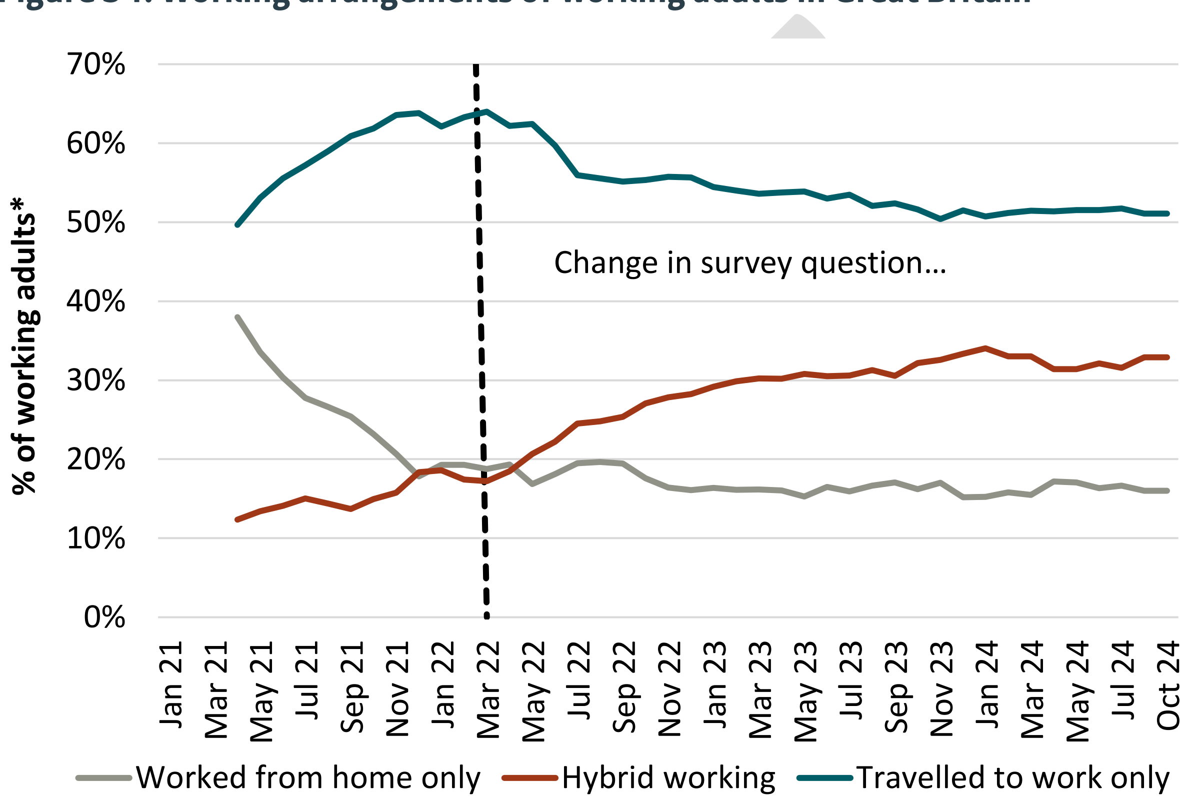
Census 2011 showed that around 4% of GM residents in employment worked mainly at home. The COVID-19 pandemic resulted in a rapid acceleration of the extent of working from home amongst GM residents, which was reflected in national data. At the height of national lockdowns nearly half of all working adults in Great Britain worked at home at some point in that week[20].

In the final quarter of 2022, around 50% of respondents to the GM Residents Survey indicated that they had worked from home at least some of the time[21]. Figure 54

[20] Source: Characteristics of homeworkers, Great Britain - Office for National Statistics (ons.gov.uk)
[21] Source: GM Residents Survey January 2023 - Wave 5

shows that across Great Britain at the end of 2022 the proportion of homeworkers was around 45%. It is possible that the GM Residents survey methodology (which saw around 50% of the 1,470 respondents being captured by the web) resulted in some bias. Nevertheless, it was clear that the pandemic had resulted in rapid transformational change. Figure 54 shows that trends in working arrangement appear to be showing signs of stabilising in 2024, with broadly half of working adults travelling to work only, a third hybrid working, and around 15% working from home only.

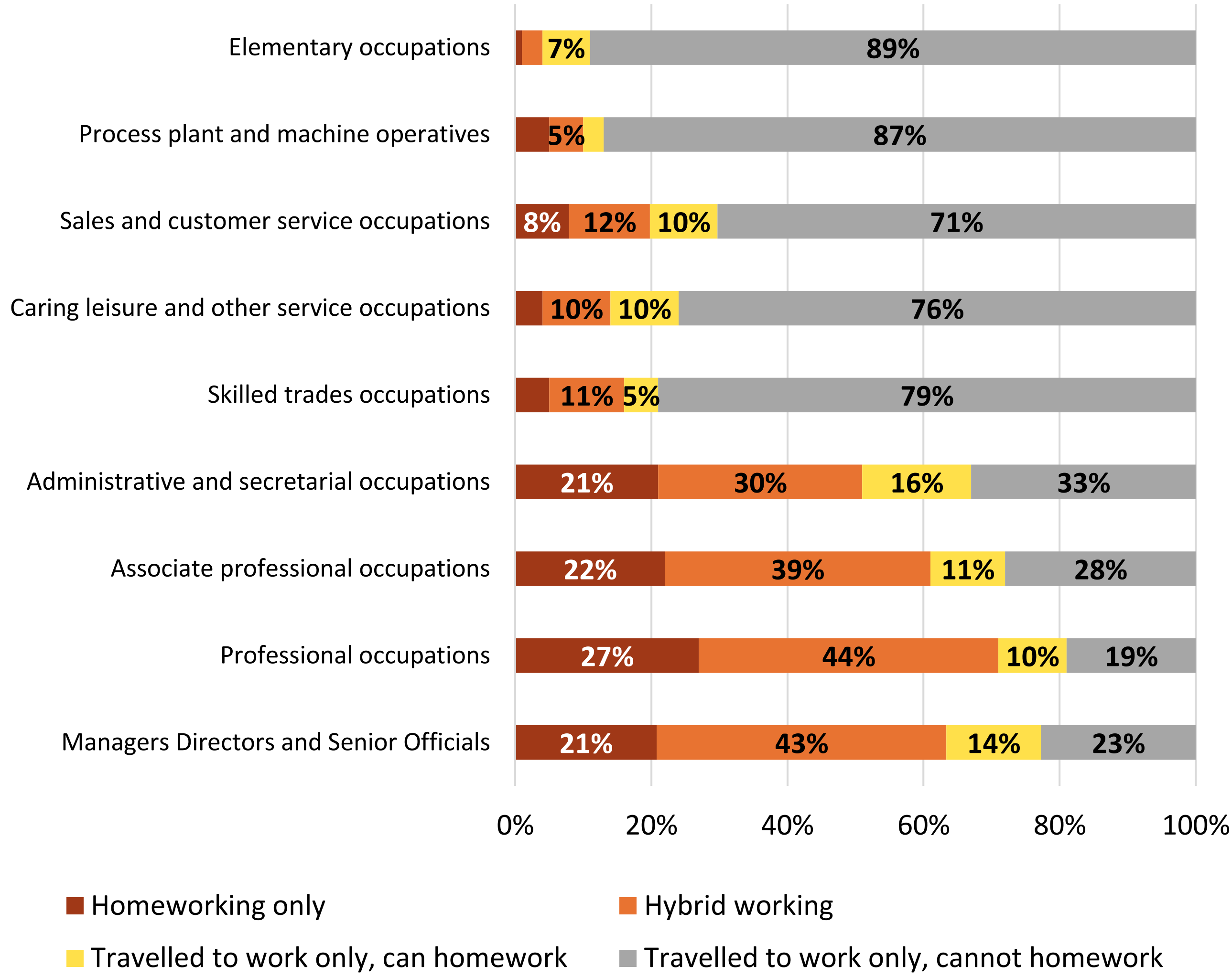
Figure 54: Working arrangements of working adults in Great Britain



Source: Opinions and Lifestyle Survey (ONS) (available at Who are the hybrid workers?)
*the % values are calculated with respondents who did not work (eg on leave) during the relevant period excluded. A single value is plotted for each calendar month. Where there were multiple periods within a calendar month where responses were collected, it is only the final period within the calendar month that is shown.

At a national level, ONS have pool together eight waves of the Opinions and Lifestyle Survey to provide a sample (6,670 working adults) large enough to support more in-depth analysis. Figure 55 shows that there were very distinctive differences across occupation types in the proportion of workers who had worked from home in the previous 7 days. For administrative, professional, and senior roles over 50% of workers had worked at home for at least one day in the previous week, while for elementary, and process plant and machine operatives this was 10% or lower.

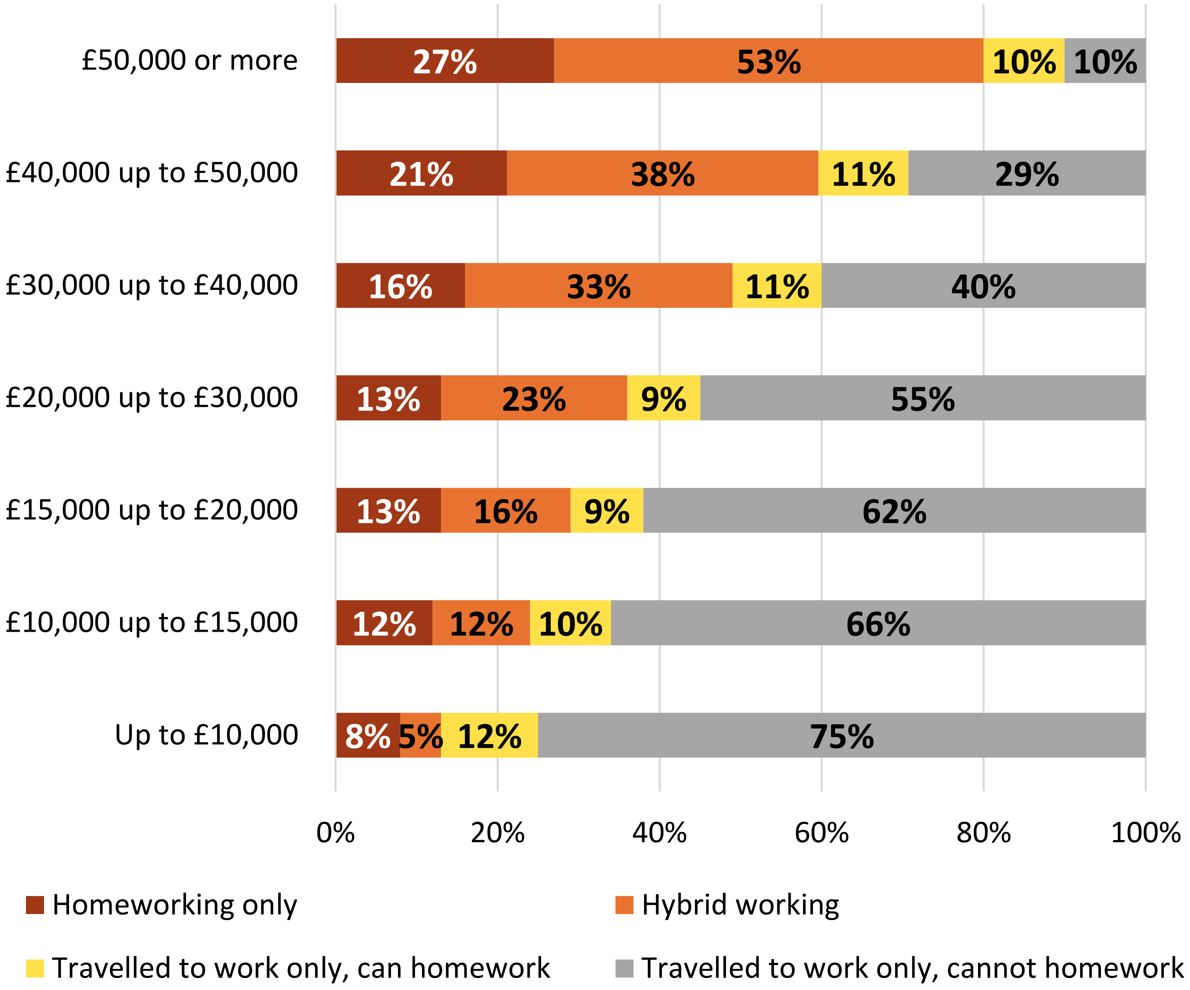
Figure 55: Homeworking by occupation type (Sept 2022 to Jan 2023)



Source: Opinions and Lifestyle Survey (ONS) (available at characteristics of homeworkers, GB: Sept 22-Jan 23)

Figure 56 shows that there is a strong relationship between income band and homeworking. Only 10% of those earning £50,000 or more indicated that they could not work from home, while for those earning less than £20,000 this was well over 60%.

Figure 56: Homeworking by income band (Sept 2022 to Jan 2023)



Source: Opinions and Lifestyle Survey (ONS) (available at characteristics of homeworkers, GB: Sept 22-Jan 23)

4.6 Deep dive 1: Regional Centre trends and implications

Why is the Regional Centre so important to achieving the Right Mix?

Of all the spatial themes, it is the Regional Centre that has the highest public transport mode share. The emergence of a rapidly increasing resident population within the Regional Centre has also helped to support active travel.

Our Travel Diary Survey data indicates that prior to the onset of COVID-19, it was the Regional Centre spatial theme that had the lowest car mode share. Our most recent 2023 data suggests that the car mode share of Regional Centre trips had increased to reach 47%, with the Neighbourhood spatial theme heading in the opposite direction to become the lowest at 38%.

The high growth potential of the Regional Centre, combined with it being the focal point for the existing GM public transport network, prime it for delivering high quality public transport services in a financially sustainable manner. This makes the performance of the Regional Centre particularly important to achieving the Right Mix vision, which will require more GM residents to adopt low car use lifestyles than is currently the case.

How do our findings impact the pathway to the 2040 Right Mix vision?

The Regional Centre has been particularly exposed to changes in commuting patterns following the pandemic, due to both the scale and profile of employment within it.

It's clear that the Regional Centre is growing in relative importance to GM, and it's therefore encouraging that the increase in the proportion of trips made by car as overall travel demand fell during the pandemic, has been temporary.

It represents a major success for the attractiveness of public transport for accessing the City Centre that the 2023 car mode share of 24%, was the same as recorded for the 2015-2017 period when overall demand was 30% higher. This validates continuing to make a redistribution of Wider City Region trips to the Regional Centre a key aspect of a pathway to the 2040 Right Mix Vision.

Figure 49 showed how important the Regional Centre is as a destination for accessing employment opportunities. In 2023, it accounted for 21% (over 1 in 5) of all jobs in GM, which represented over 300,000 jobs.

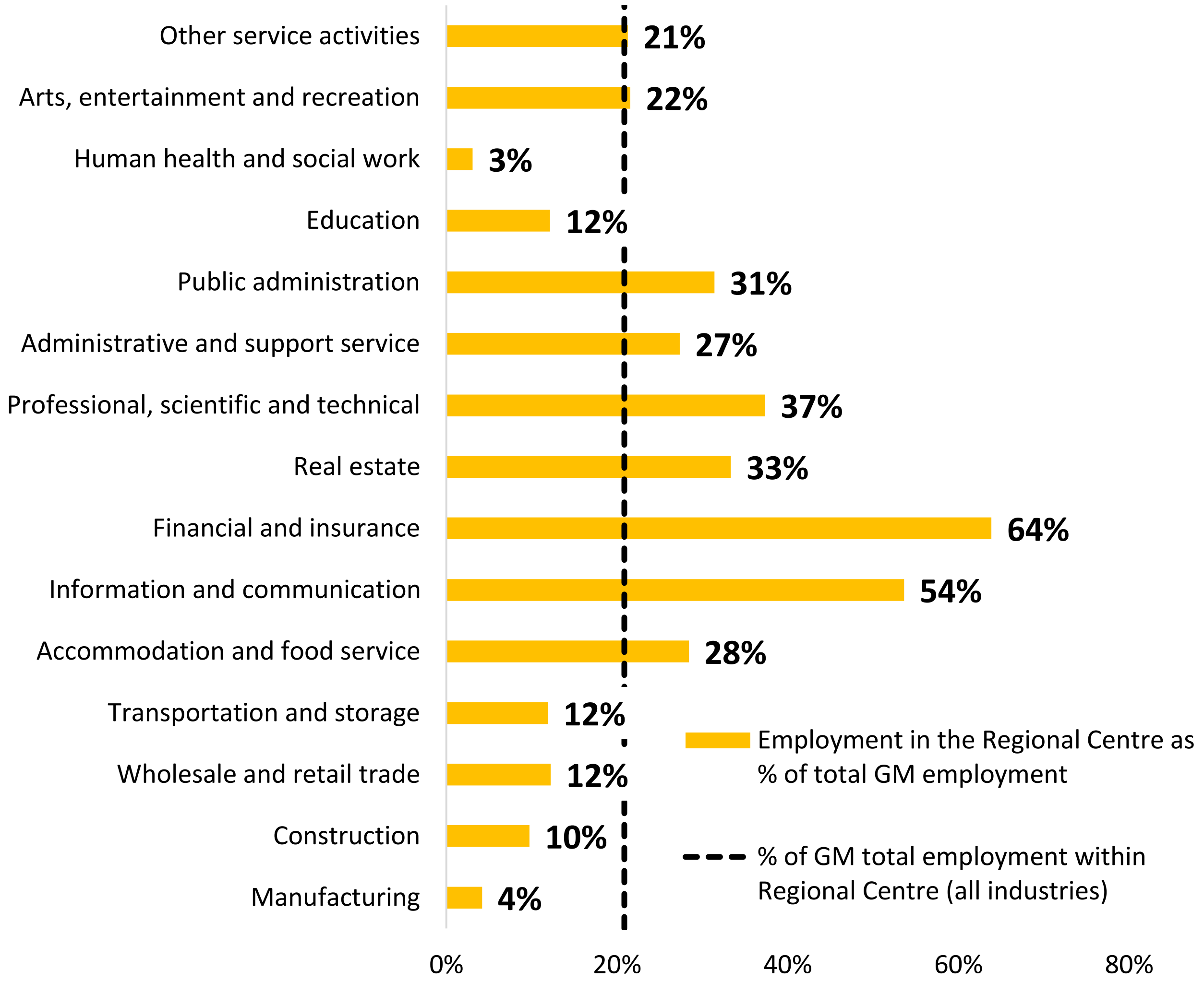
Figure 51 showed how since the turn of the century, Manchester and Salford have consistently contributed an increasing proportion of GM GVA. This points to the Regional Centre being important for accessing high value-added employment.

This is borne out by Figure 57 which shows how the Regional Centre alone accounts for nearly 2 in 3 of all financial and insurance employment in GM. Similarly, over half of all GM information and communication, and over a third of all professional, scientific and technical employment is in the Regional Centre.

While occupation and industry are not a direct match, it is possible to infer from Figure 55 that the concentrations of high value-added employment that are associated with the Regional Centre have a high propensity for roles that include homeworking.

Figure 57 also provides evidence of the importance of the Regional Centre as a hospitality and leisure destination with it accounting for nearly 1 in 4 accommodation and food service jobs in GM, and over 1 in 5 arts, entertainment and recreation jobs.

Figure 57: Regional Centre employment breakdown by industry (2023)



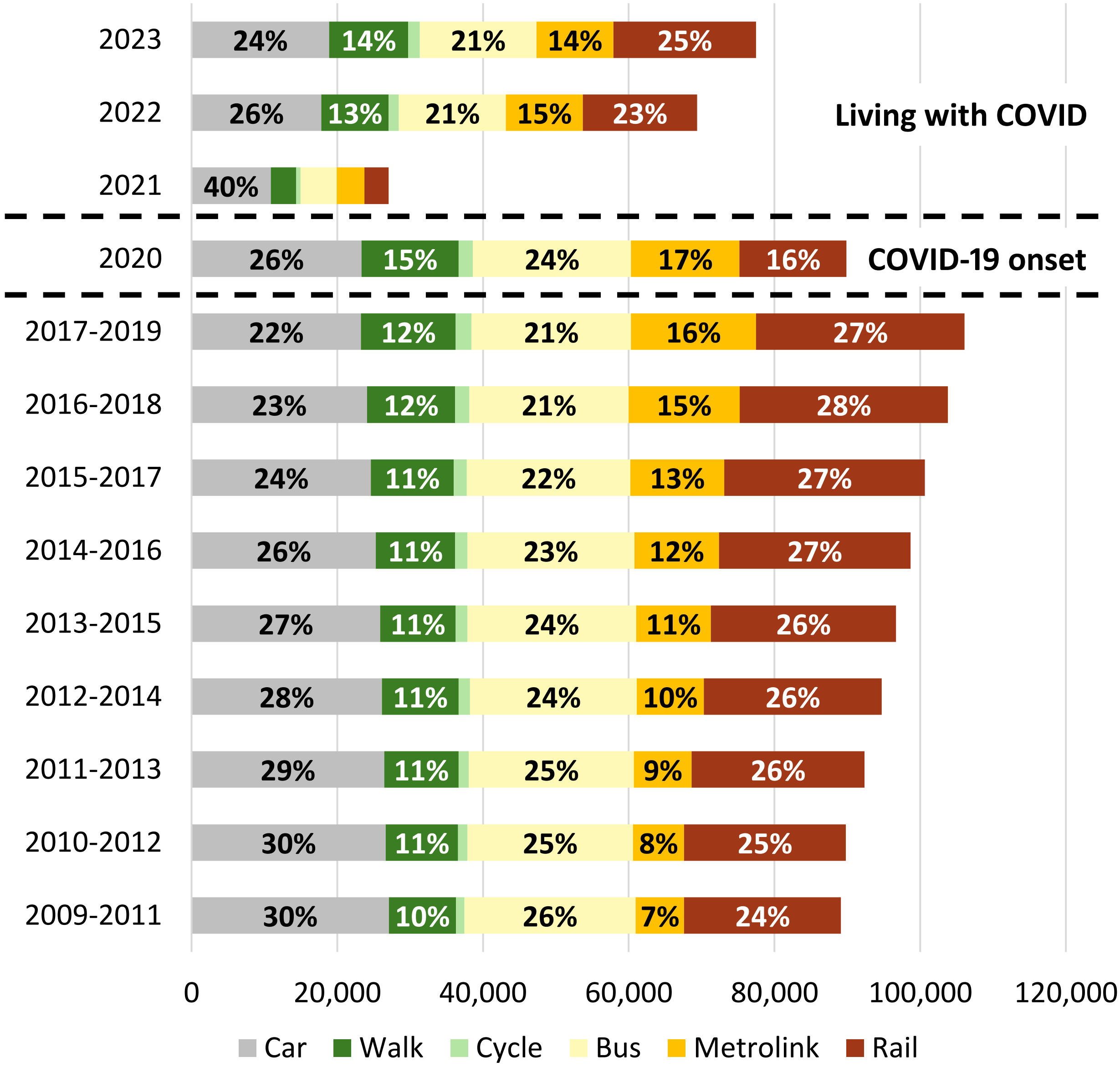
Source: Business Register and Employment Survey (ONS) (available at https://www.nomisweb.co.uk/), and Mid-Year population estimates 2023

At the core of the Regional Centre is the City Centre, which as Figure 58 demonstrates was simultaneously seeing both continued growth in overall demand, and a reduction in the absolute volume of car trips prior to the onset of COVID-19.

Figure 58 shows there was rapid growth in rail-based modes between 2009 and 2019. This helped support the increasing proportion of GM GVA that is accounted for by Manchester and Salford (as shown in Figure 51), by helping the City Centre to attract businesses, and helping people access the employment opportunities that arise from that.

As travel demand fell following the onset of COVID-19, it is noticeable that the proportion of trips made by car increased. It represents a major success for the attractiveness of public transport for accessing the City Centre that the 2023 car mode share of 24%, was the same as recorded for the 2015-2017 period when overall demand was 30% higher.

Figure 58: AM Peak (07:30-09:30) inbound trips over City Centre Inner Ring Road



Source: GM cordon counts (available at https://tfgm.com/commercial/transport-surveys-research/reporting)

4.7 Deep dive 2: Comparison goods shopping trends and implications

Why do trends in comparison goods shopping matter?

The mode share of shopping trips varies by retail location type. Between 2017-2019 a little over 10% of city centre shopping trips were made by car, whereas for retail parks this was 85%.

Between 2010 and 2024 retail parks doubled their share of the comparison goods market, while the city centre saw its share reduce by a third, and the main town centres lost a quarter of theirs. This means that comparison goods shopping trips can be expected to now have a considerably higher car mode share than was the case in 2010.

It's also important to recognise that many of GMs retail parks contain other leisure related activities, some of which have relocated from town centres eg food and drink offerings.

How do our findings impact the pathway to the 2040 Right Mix vision?

The redistribution of retail activity to retail parks at the expense of the city centre and main town centres currently represents a clear headwind to achieving the 2040 Right Mix vision. At the most fundamental level it is a trend that is increasing car dependency. In respect of individual components of our proposed pathway it is particularly adverse for the redistribution of trips from the Wider City Region spatial theme to the Regional Centre.

The introduction of a Town Centres spatial theme will help to demonstrate how reimagining our town centres to support an improved residential offering, can play an important role in delivering the 2040 Right Mix vision.

In 2022, the wholesale and retail trade was GM's largest individual industry in terms of GVA, valued at close to £11 billion (12% of the total GM economy in GVA terms)[22]. While GVA is not a measure of travel outcomes, the scale of the wholesale and retail trade industry in GVA terms, combined with the fact that in 2022 it accounted for

[22] Regional gross value added (balanced) by industry: all ITL regions (ONS)

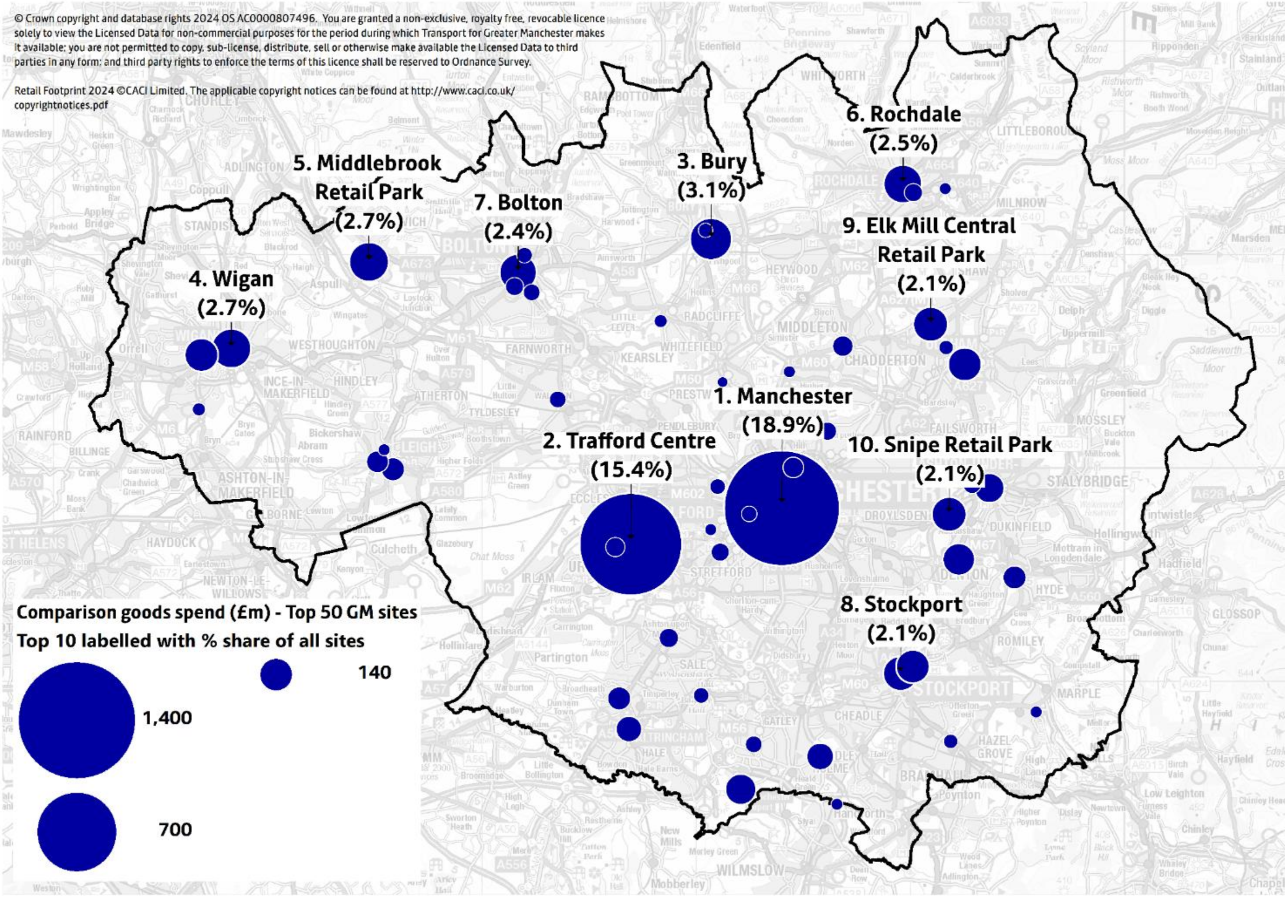
14% of all GM employment (see Figure 47) demonstrates its potential to influence travel outcomes at a strategic scale.

A major component of the wholesale and retail trade industry is comparison goods shopping. Figure 59 shows the top 50 (by estimated total spend) comparison goods retail locations in GM as of 2024. The top 10 locations are labelled to show the name and share of total spend across all (not just the top 50) major comparison goods retail locations in GM. The City Centre (labelled as ‘Manchester’ on Figure 59) and the Trafford Centre dominate, together accounting for around a third of all spend. It’s notable that the remainder of the top 10 includes 3 retail parks. The retail park with the highest spend is Middlebrook (5th), which ranks higher than nearby Bolton town centre (7th), followed by Elk Mill Central (9th) and Snipe Retail Park (10th) - neither of nearby Oldham town Centre or Ashton-under-Lyne town centre rank in the top 10.

In 2010 there were no retail parks in the top 10, but both Ashton-under-Lyne town centre (6th), and Oldham town centre (9th) were present. Figure 60 analyses the top 50 comparable sites across multiple years to demonstrate how the distribution of comparison goods retail spend has changed over time. This shows that between 2010 and 2024 the market share of retail parks has nearly doubled. Conversely, both the city centre and main town centres have lost considerable market share.

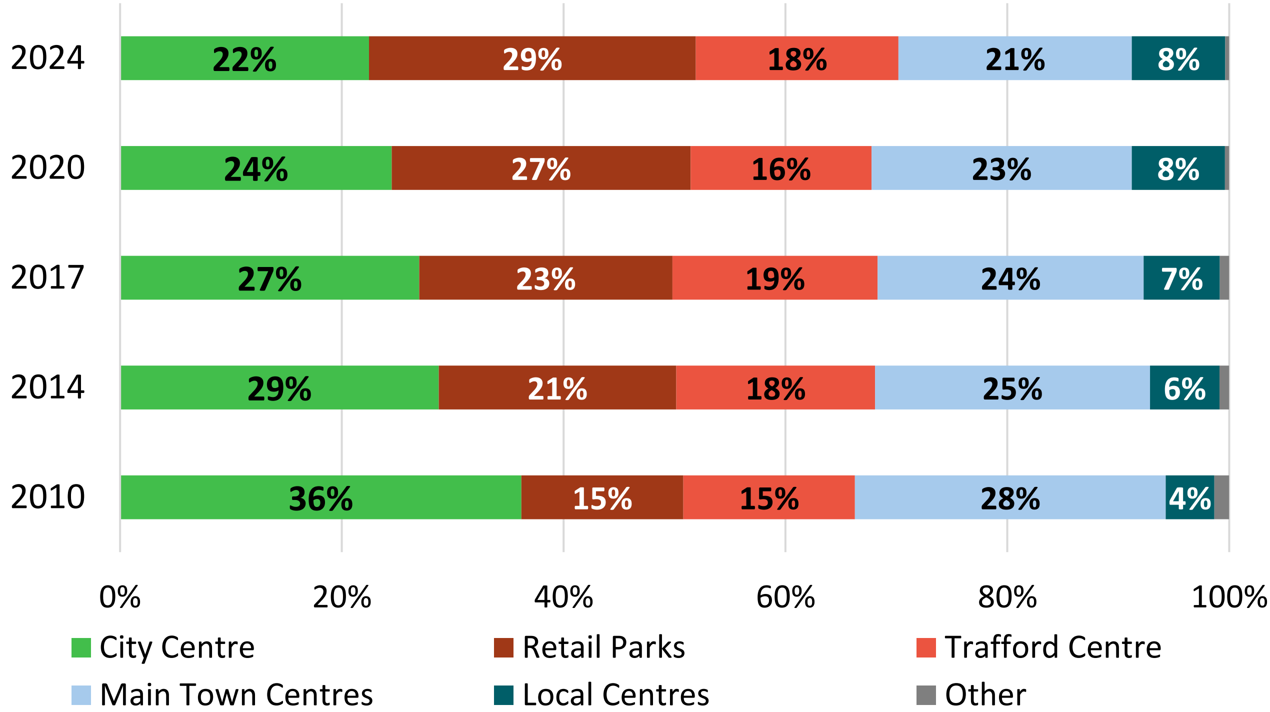
Figure 61 shows the mode share for shopping trips (2017-2019) by retail location type. Car driver mode share for retail parks was 85%, in comparison to around 50% for both main and local town centres, and just 13% for the city centre.

Figure 59: Comparison Goods Spend - Top 50 GM retail locations (2024)



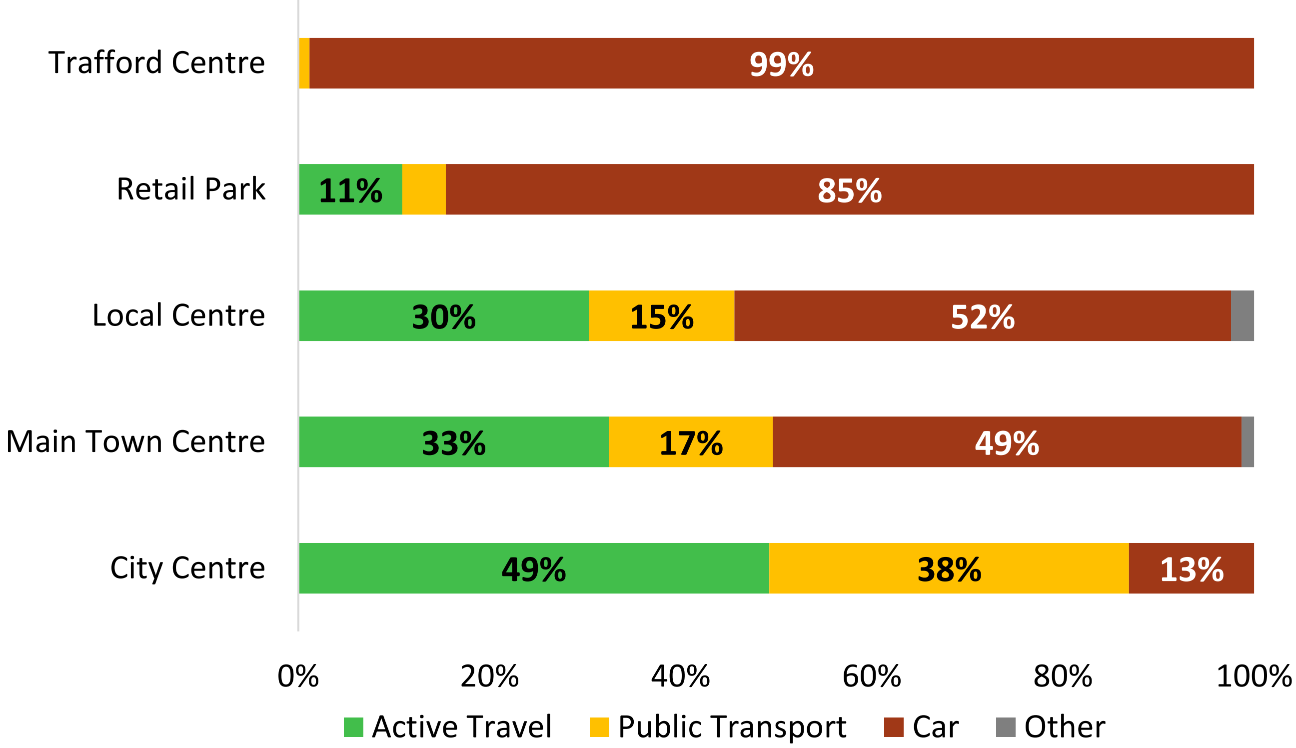
Source: Retail Footprint ©CACI Limited. The applicable copyright notices can be found at http://www.caci.co.uk/copyrightnotices.pdf

Figure 60: Top 50 - spend share by retail location type



Source: Retail Footprint ©CACI Limited. The applicable copyright notices can be found at http://www.caci.co.uk/copyrightnotices.pdf

Figure 61: Mode share for shopping trips by retail location type (2017-2019)

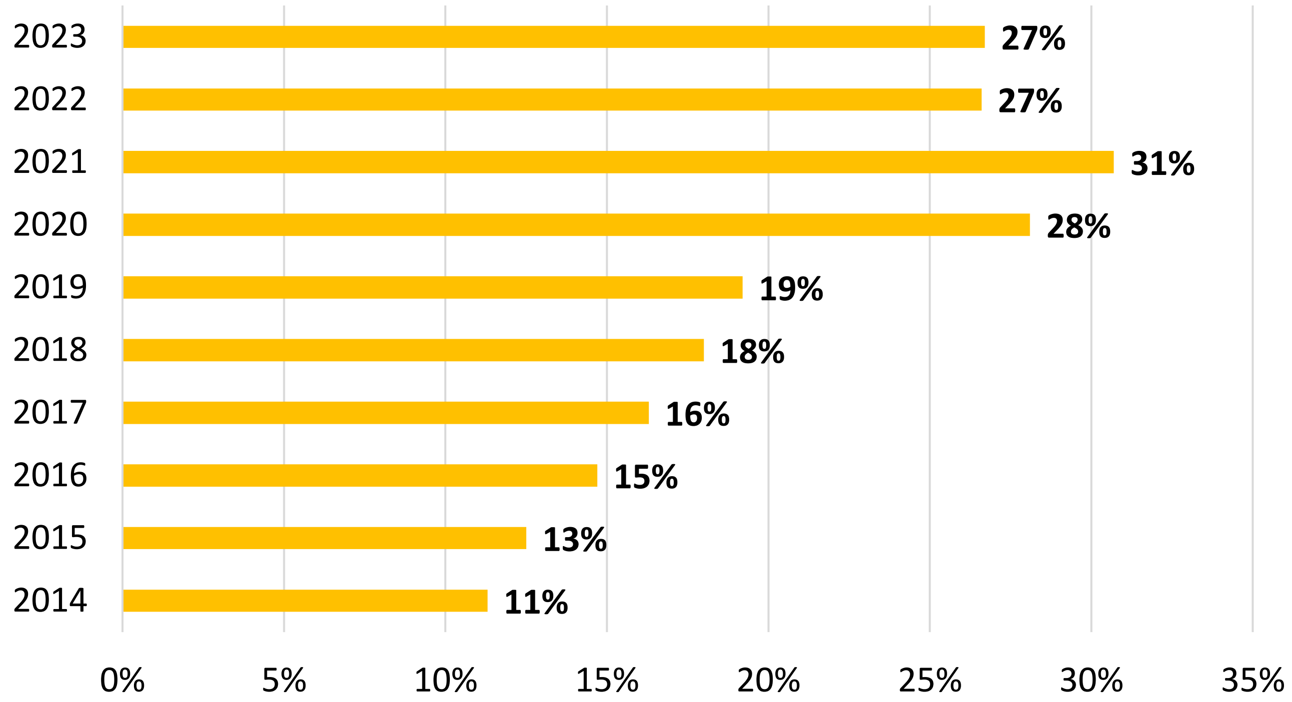


Source: TRADS Yrs 2017-2019, Retail Footprint ©CACI Limited. The applicable copyright notices can be found at http://www.caci.co.uk/copyrightnotices.pdf

Note: the Metrolink Trafford Park Line opened in 2020 and is therefore not reflected in the above analysis

Figure 62 shows how a trend of an increasing percentage of total retail sales being made online, accelerated rapidly with the onset of the pandemic. The latest 2023 data pointed to a modest correction (vs. the 2021 high of 31%), but at 27% it remained well up on the 19% of 2019. While retail sales do not directly relate to trips, they do have an impact on travel demand, and this is varied. For instance, a reduction in consumer travel demand may reduce pressure on the transport network, but it also has the potential to negatively impact the financial sustainability of public transport services.

Figure 62: Internet sales as a percentage of total retail, Great Britain (2014-2023)



Source: Retail Sales Index – Internet Reference Tables, ONS 2024. Dataset J4MC (available at: http://www.ons.gov.uk/businessindustryandtrade/retailindustry)

4.8 Visitor Economy

Why do trends in the visitor economy matter?

The visitor economy generates both economic value and travel demand to GM. In the years leading up to the pandemic the value of the visitor economy was growing rapidly. In 2019 tourism activity supported over 100,000 full time equivalent jobs in GM, with over half of them being based in Manchester. This made the visitor economy a key contributor to supporting growth in the proportion of Regional Centre trips as outlined in the proposed pathway to the 2040 Right Mix Vision.

How do our findings impact the pathway to the 2040 Right Mix vision?

By 2022 the economic value of tourism activity in GM had already recovered strongly to reach around 90% of pre-pandemic levels. The distribution of employment associated with tourism activity continued to be strongly focussed on Manchester. This rapid recovery, combined with on-going efforts to promote Greater Manchester as a tourist destination indicate that there is high growth potential. This can be expected to translate into travel demand which is concentrated on the Regional Centre - something which is an important part of the pathway to the 2040 Right Mix Vision.

Greater Manchester Leisure Visitor Research 2023 indicated that less than 2% of visitors were using buses (excludes free buses). This is a market with clear growth potential, which if it can be successfully tapped

Figure 63 shows that in 2022 the economic value of tourism activity in GM had already recovered strongly to reach around 90% of pre-pandemic levels at £8.7 billion impact (in terms of the direct and indirect impact, e.g. hosting businesses and wider supply chain). In 2022 tourism activity supported 87,500 full time equivalent jobs in GM (vs. c.100,000 pre-pandemic). Activity is particularly concentrated within Manchester which accounts for over 50% of both economic value and jobs.

Figure 63: Trend in Economic Value of Tourism

Year	Economic Impact of tourism activity (£ billion)		FTEs supported by tourism activity	
	GM	Manchester	GM	Manchester
2022	8.7	4.65	87,500	45,600
2021	4.4	2.27	47,300	23,900
2020	3	1.46	33,700	16,000
2019	9.5	5.16	102,500	54,900
2018	9	4.86	100,700	53,400
2017	8.4	4.51	95,800	50,400

Source: STEAM; Scarborough Tourism Economic Activity Monitor, Global Tourism Solutions (UK) Ltd.

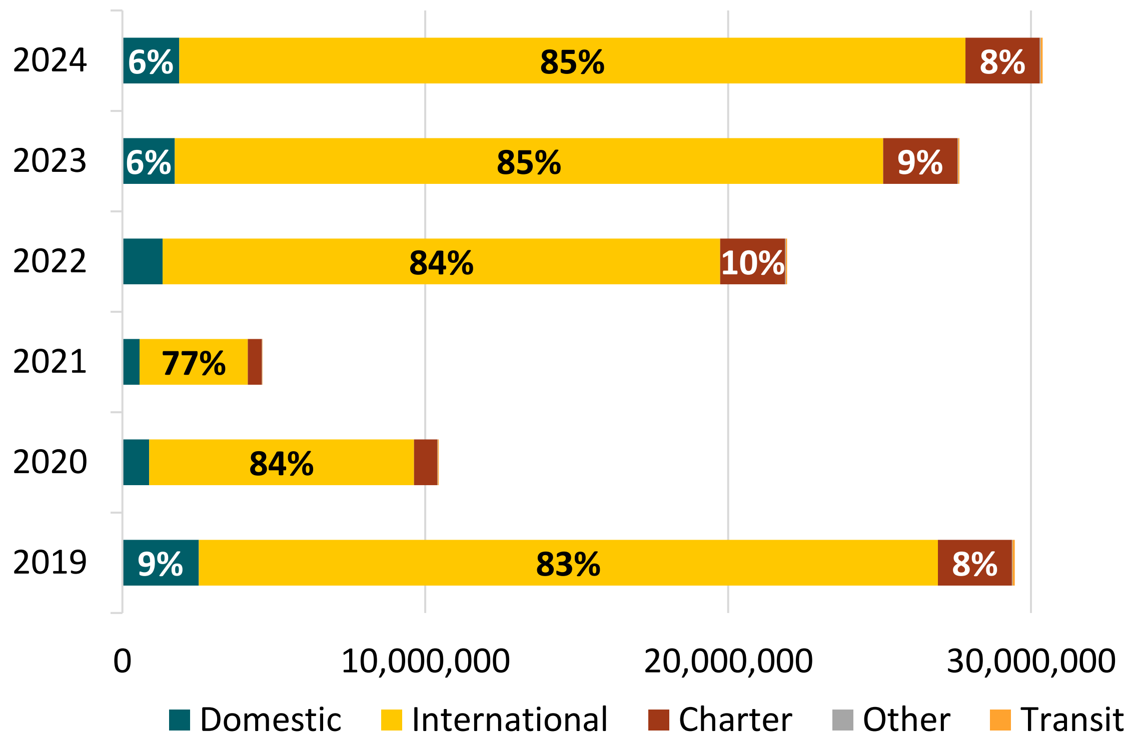
Greater Manchester Leisure Visitor Research 2023 (Marketing Manchester, 2023) indicates the following:

- The significance of tourism to GM in the future is also likely to increase. In 2023, 99% of surveyed visitors said that a future, leisure visit to Greater Manchester was likely for them in the next two years, an increase from 82% in 2018.
- Over 95% of visitors were walking to get around GM. The next highest was Metrolink which was being used by over 40%. Car was being used by around 20% of visitors. While free buses were being used by 15%, it was notable that less than 2% of visitors were using other types of bus
- The average relative value of each visit has grown since 2018 beyond the value of inflation. In 2023, fewer visitors are staying in free accommodation, with a significant growth in the use of serviced apartments.
- Of visitors from overseas, 94% flew, while 6% arrived by rail, with most flyers arriving via either London Heathrow or Manchester Airport.

Figure 64 shows that 2024 passenger activity at Manchester Airport surpassed that of 2019. In the year preceding October 2024, passenger use was the highest on record at over 30.3 million, through 185 destinations, the 3rd busiest airport in the UK.

Meanwhile, domestic flight passengers using Manchester Airport have reduced in absolute and relative terms 9% to 6% of total passengers, indicating a slight decline in the use of air travel for City-to-City trips, but a continually growing demand for global travel.

Figure 64: Trends in passenger usage, Manchester Airport, 2019-2024



Source: Manchester Airport Traffic Statistics

As GM's gateway to global travel, Manchester Airport is a significant economic driver. It is estimated in 2022, to have supported around 20,000 jobs (direct on and off-site), and wider employment impacts of over 80,000 jobs across the north, generating £5.7 billion GVA across the North of England.

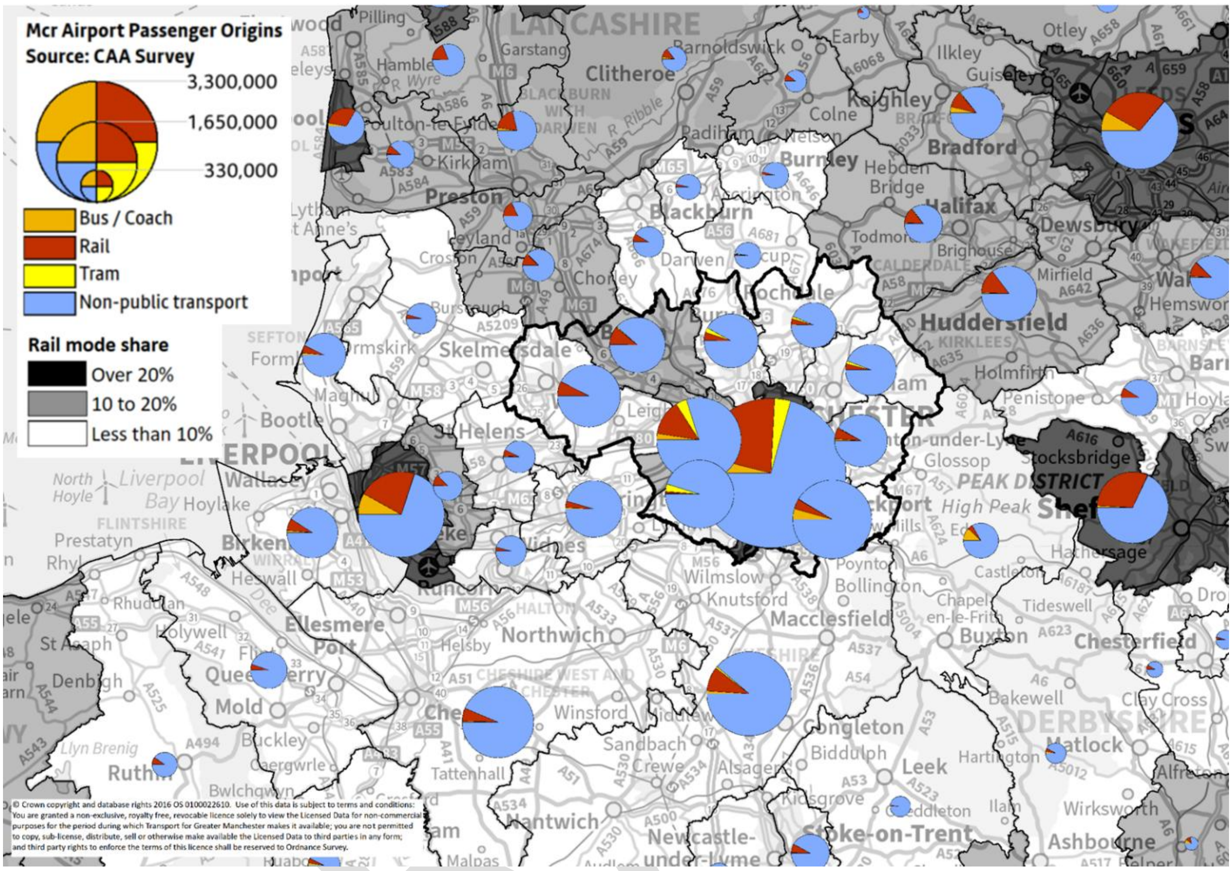
It is unique in GM as one of the largest UK aviation and aerospace clusters in the UK, with 140 businesses on-site. More widely, the airport acts as a gateway for approximately 75% of passengers residing in the North West of England. Furthermore, it accommodated over 65,000 tonnes of freight trade in 2022.

In 2023, it was assessed that Manchester Airport has the potential to triple its GVA contribution to £16.3 billion by 2050[23]. This would be underpinned in part by the number of passenger journeys doubling to over 60 million passengers by 2050. To achieve this will require a reduction in the proportion of passengers accessing Manchester Airport either as a car driver or a passenger (incl. taxi), which stood at around 75% when the Manchester Airport Sustainable Development Plan was produced in 2016, and has remained broadly similar in 2024 based on CAA data used to produce Figure 65.

[23] A superhub for the North. How Manchester Airport can drive economic growth and rebalancing, ARUP on behalf of Manchester Airports Group (MAG), 2023.

Figure 65 shows that while non-public transport modes are the dominant means for accessing Manchester airport, there are strong rail markets in the nearby cities of Leeds, Liverpool and Sheffield.

Figure 65: Manchester Airport surface access - local markets



Source: MAG analysis of CAA data

4.9 Approach to supporting future economic growth

The PfE Joint Development Plan targets the delivery of a minimum of at least 2 million sqm of accessible new office floorspace over the period 2022-2039. This target is based on modelling of past economic trends which suggests that the supply of new office floorspace needs to at least match average development rates over recent years.

Figure 66 provides an overview of office land supply in GM and includes Stockport which is not subject to the policies of the PfE plan. Figure 66 shows that most of the office floorspace in the land supply is focused on the Regional Centre. There are also notable concentrations of office floorspace in the main town centres, and Manchester Airport.

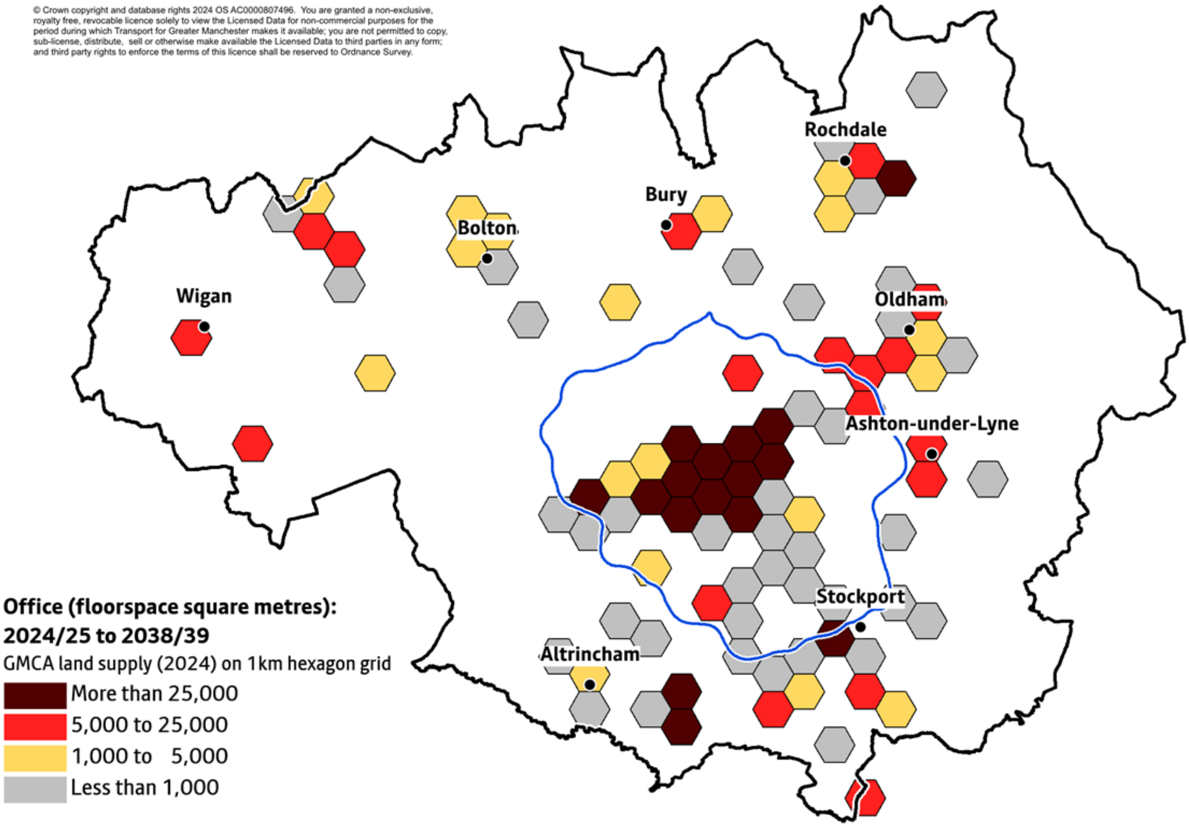
The PfE Joint Development Plan targets the delivery of a minimum of at least 3.5 million sqm of new, accessible, industrial and warehousing floorspace over the period 2022-2039. It points to evidence that past industrial and warehousing completions have been constrained by a lack of suitable sites within Greater Manchester, resulting in the city-region being unable to compete for some major occupiers. When combined with the need to secure a significant increase in the quality of accommodation available to respond to evolving business requirements and increasing global competition, this means that a considerable uplift on past development rates is needed.

The PfE Joint Development Plan document states that new industrial and warehousing development has an important role to play in addressing the economic disparities across GM, and in particular to boost the competitiveness of northern areas. Consequently, the release of Green Belt for employment use is focused primarily in the northern parts of GM, with a string of high quality opportunities of varying sizes focused particularly around the key motorway corridors. Overall, this will result in around two-thirds of the supply being in the districts of Wigan, Bolton, Bury, Rochdale, Oldham and Tameside. The strategic location of Northern Gateway will alone account for about one-fifth of the GM supply

Figure 67 provides an overview of industry and warehousing land supply in GM and includes Stockport which is not subject to the policies of the PfE plan. Figure 67 shows that industry and warehousing land supply is weighted towards the north of GM. There are also notable concentrations focused on Trafford Park and Port Salford.

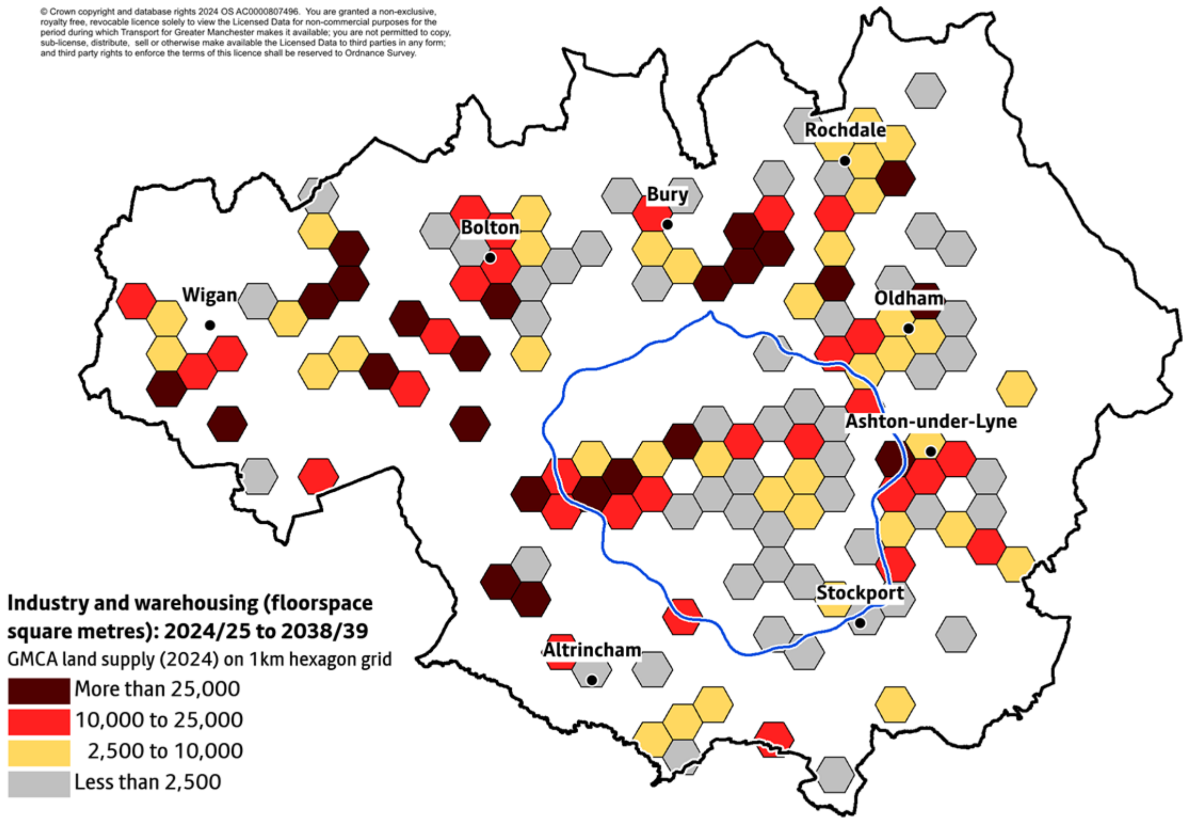
The different distribution of office, and industry and warehousing in the land supply is played out in Figure 68 which shows the volume of each type of employment floorspace within each of the GMAL levels, which indicate the density of the public transport network (the higher the level the denser the public transport provision). Nearly 95% of the office floorspace in the land supply is in locations with GMAL 5 or above, while for industry and warehousing floorspace 90% is in locations with GMAL 4 or below.

Figure 66: Office land supply to 2038/39



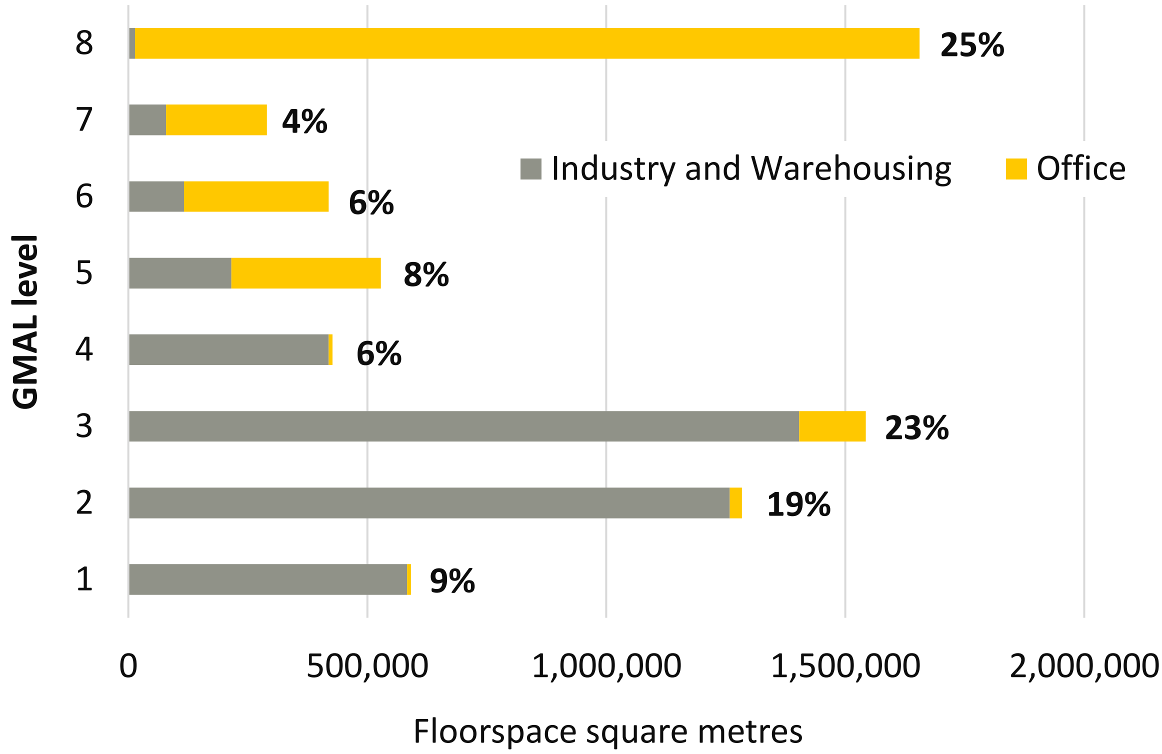
Source: GM Land Supply 2024 (GMCA)

Figure 67: Industry and warehousing land supply to 2038/39



Source: GM Land Supply 2024 (GMCA)

Figure 68: Employment land supply to 2038/39 by average GMAL per site



Source: GM Land Supply 2024 (GMCA)

Annex 1: People and place themes and monitoring 2040 Right Mix target progress

The currently proposed pathway to the 2040 Right Mix target which was summarised in Figure 2 is expressed using people and place themes. While at the GM level there has been no decrease in either the proportion of trips or total distance travelled by GM residents by car or van between 2016-18 and 2023 (as shown by Figure 3 and Figure 4) there are differences at a people and place theme level.

Figure 69 to Figure 76 enable GM resident comparisons of 2023 and 2017 daily trips and daily person kms travelled by both main mode and journey purpose. The following are key observations[24] in the context of our progress towards the 2040 Right Mix target:

Total trips - changes in residents travel behaviours

- The total number of daily trips in 2023 was 5.6 million, down from 6.1 million in 2017 - this is explained by impact of the lower average number of trips per person day in 2023, exceeding the impact of population growth since 2017.
- There were 2.5m daily Neighbourhood trips in both 2023 and 2017. The proportion of trips that were Neighbourhood increased from 41% in 2017 to 45% in 2023.
- There were 1.85m daily Wider City Region trips in both 2023 and 2017. The proportion of trips that were Wider City Region increased from 31% in 2017 to 33% in 2023.
- The remaining people and place themes (Regional Centre, City-to-City, and Town Centres) all saw a reduction in the number of daily trips between 2017 and 2023. Combined they accounted for 1.2m trips in 2023, down from 1.7m in 2023.

Mode share of trips

- Walk mode share of Neighbourhood trips by increased from 51% in 2017, to 58% in 2023. In absolute terms this translated to nearly 60 million more walking Neighbourhood trips per year by GM residents in 2023 compared to 2017. Neighbourhood is the only people and place theme where there is evidence of a reduction in car mode share between 2017 and 2023.
- There were 1.6m Wider City Region daily car trips in both 2023 and 2017. In both 2023 and 2017 nearly 9 out of 10 Wider City Region trips were made by

[24] The term 'car' is used to refer to 'car or other' in the findings drawn from Figure 69 to Figure 76.

car. In 2023, the Wider City Region people and place theme accounted for 49% of all car trips, up from 45% in 2017.

- The car mode share of Regional Centre trips increased from 30% to 47% between 2017 and 2023. This translated to 230,000 Regional Centre daily car trips in 2023, up from 200,000 in 2017.
- City-to-City trips were dominated by car in 2017, and this increased further in 2023 where car accounted for 9 out of 10 of these trips. However, the overall smaller size of the City-to-City people and place theme in 2023 meant there were less car trips in absolute terms.
- The car mode share of Town Centres trips increased from 58% to 65% between 2017 and 2023. However, the overall smaller size of the Town Centres people and place theme in 2023 meant that there were less car trips in absolute terms.

Journey purpose share of trips

Overall, there is a high level of consistency at the people and place theme level between the journey purpose shares of 2017 and 2023. The notable exceptions are:

- The share of Wider City Region trips that were commuting or business fell from 31% in 2017 to 25% in 2023. Conversely, the share of Wider City Region trips that were made for 'other' purposes increased from 27% to 32% over the same period.
- The share of Town Centres trips that were made for shopping fell from 45% in 2017 to 39% in 2023. As a result of the overall smaller size of the Town Centres people and place theme this meant that there was a 35% reduction in the volume of Town Centres shopping trips between 2017 and 2023.

Total distance travelled

- GM residents travelled 34 million kms on a typical day in 2023, which was broadly comparable to the 36 million kms on a typical day in 2017.
- Despite accounting for over 40% of all trips, Neighbourhood trips accounted for only 6% of distance travelled on a typical day in both 2023 and 2017.
- Wider City Region trips accounted for 39% of the distance travelled by GM residents in 2023, up from 34% in 2017. This translated to around 200 million additional Wider City Region person kms in 2023 compared to 2017.
- City-to-City trips accounted for 40% of the distance travelled by GM residents in 2023, down from 43% in 2017. This translated to around 850 million fewer Wider City Region person kms in 2023 compared to 2017.

- Both the Regional Centre and Town Centres people and place themes have seen a slight reduction in their share of overall person kms. Together, there were over 350 million fewer person kms from these people and place themes in 2023 compared to 2017.

Mode share of distance travelled

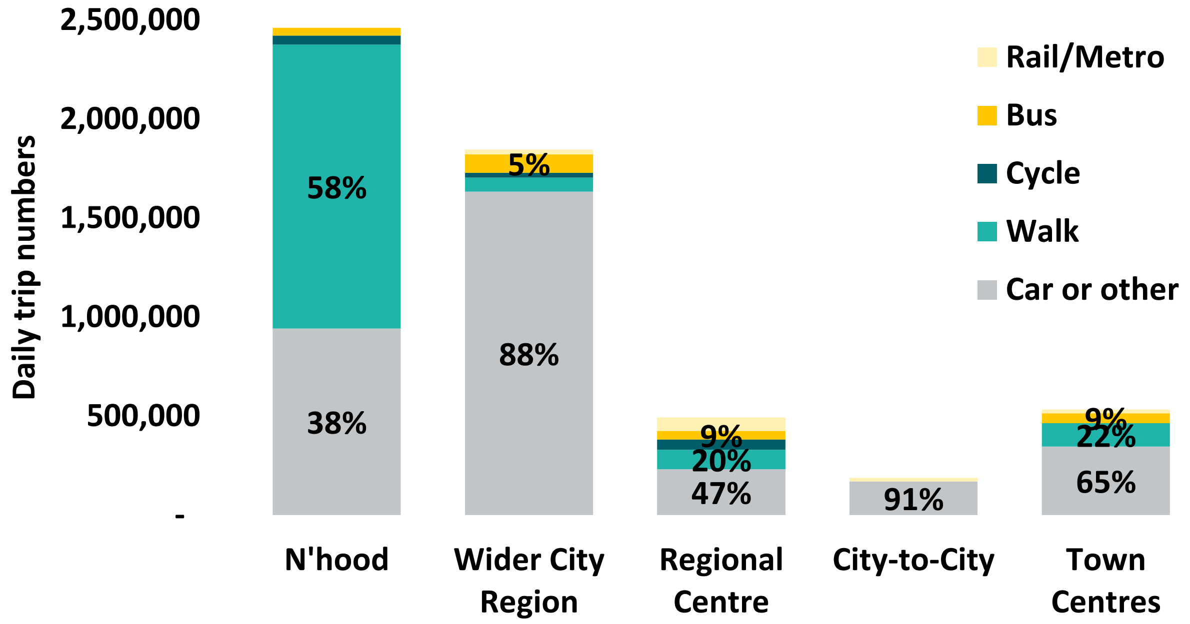
- The Wider City Region and City-to-City people and place themes together accounted for 84% of the distance travelled by car in both 2023 and 2017. In 2023 however, the Wider City Region accounted for 44% of all car person kms, up from 39% in 2017. This meant that the City-to-City car person kms reduced from 45% in 2017, to 39% in 2023.
- In both 2023 and 2017, around 90% of the total distance covered by Wider City Region trips was by car. There was also broad consistency in the City-to-City people and place theme, but the proportion of total distance travelled by car was lower at around 80%.
- While the overall distance covered by City-to-City trips was lower in 2023 than 2017, the Rail/Metro share increased from 14% in 2017, to 21% in 2023.

Journey purpose share of distance travelled

Overall, there is a high level of consistency at the people and place theme level between the journey purpose shares of 2017 and 2023. The notable exceptions are:

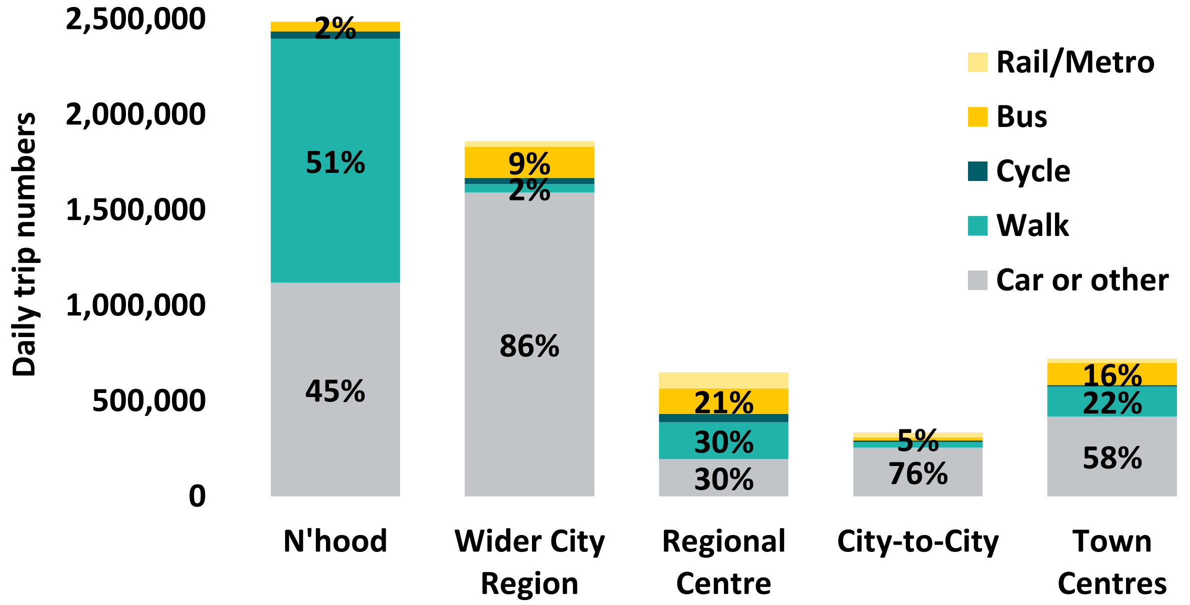
- The share of City-to-City distance travelled that was for commuting or business increased from 40% in 2017 to 47% in 2023, but the total distance travelled remained the same at c.6.2m kms per typical day. Conversely, the share of City-to-City distance travelled for 'other' purposes decreased from 42% to 37% over the same period, a reduction of c.1.5m kms per typical day in 2023 compared to 2017.
- The share of Wider City Region distance travelled that was for sport or entertainment increased from 14% in 2017 to 18% in 2023, with total distance travelled on a typical day in 2023 up c.600,000 kms compared to 2017. Conversely, the share of Wider City Region distance travelled for commuting or business purposes decreased from 37% to 32% over the same period, a reduction of c.450,000 kms per typical day in 2023 compared to 2017.
- The share of Town Centres distance travelled that was for shopping fell from 37% in 2017 to 28% in 2023. As a result of the overall smaller size of the Town Centres people and place theme this meant that there was a 38% reduction in the total distance travelled for Town Centres shopping trips between 2017 and 2023.

Figure 69: 2023 daily trips by mode by people and place theme - GM residents



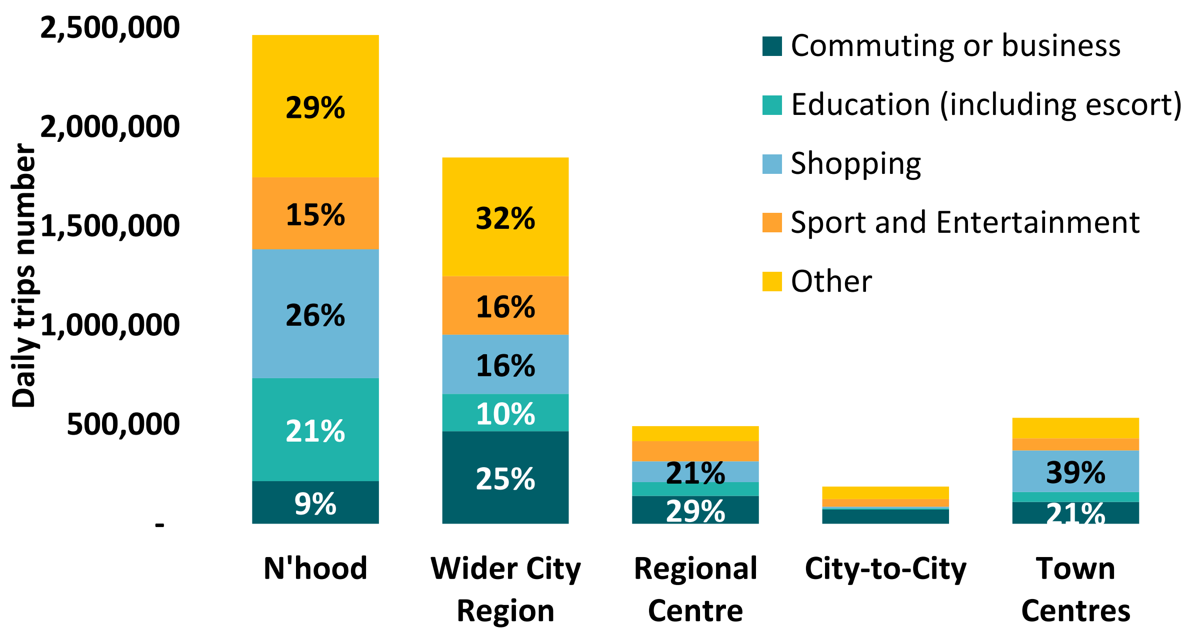
Source: GM TRADS (2023)
Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

Figure 70: 2017 daily trips by mode by people and place theme - GM residents



Source: GM TRADS (2017)
Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

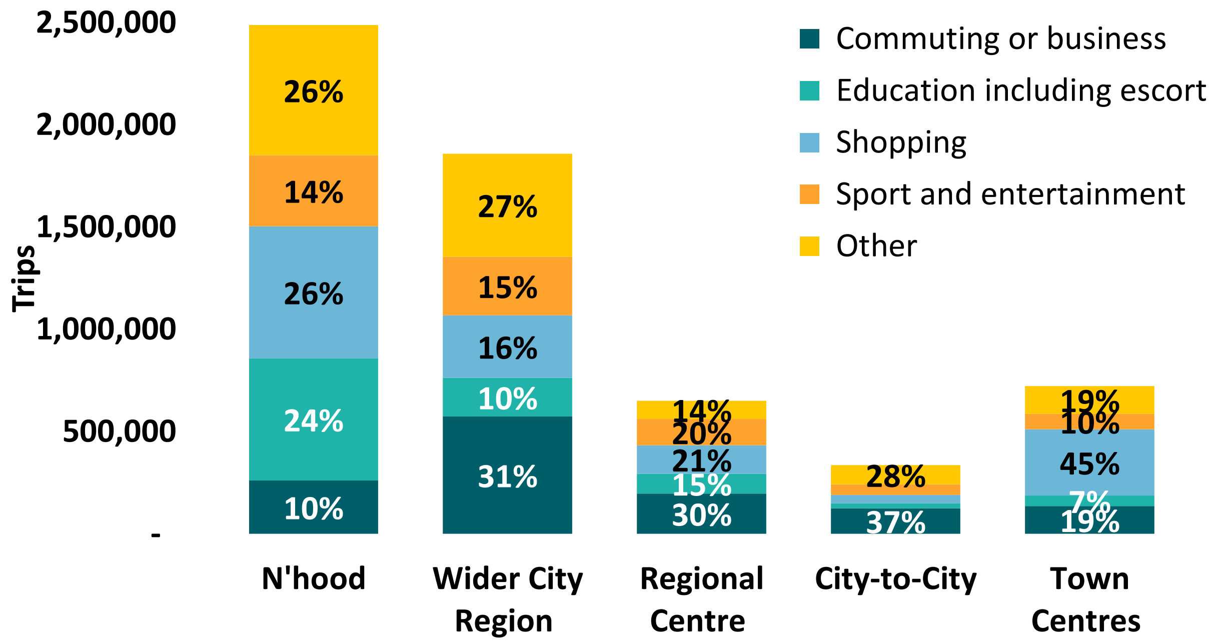
Figure 71: 2023 daily trips by purpose by people and place theme - GM residents



Source: GM TRADS (2023)

Note: Other = visiting friends, personal business, escort other, and holiday and round trip

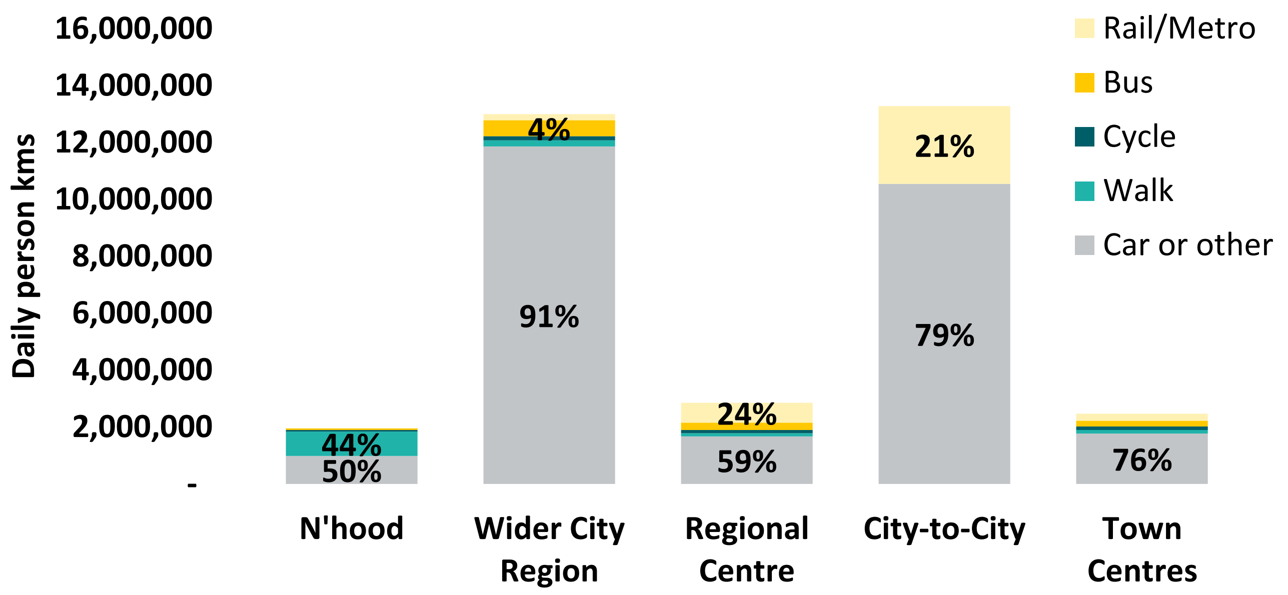
Figure 72: 2017 daily trips by purpose by people and place theme - GM residents



Source: GM TRADS (2017)

Note: Other = visiting friends, personal business, escort other, and holiday and round trip

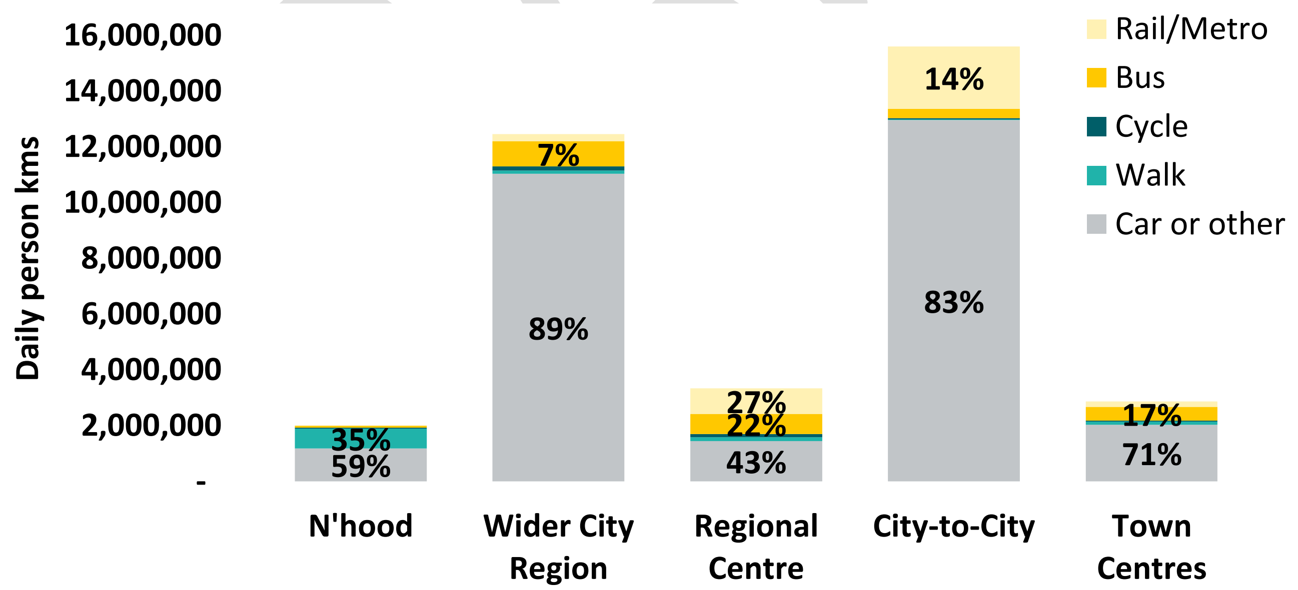
Figure 73: 2023 daily person kms by mode by people and place theme - GM residents



Source: GM TRADS (2023)

Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

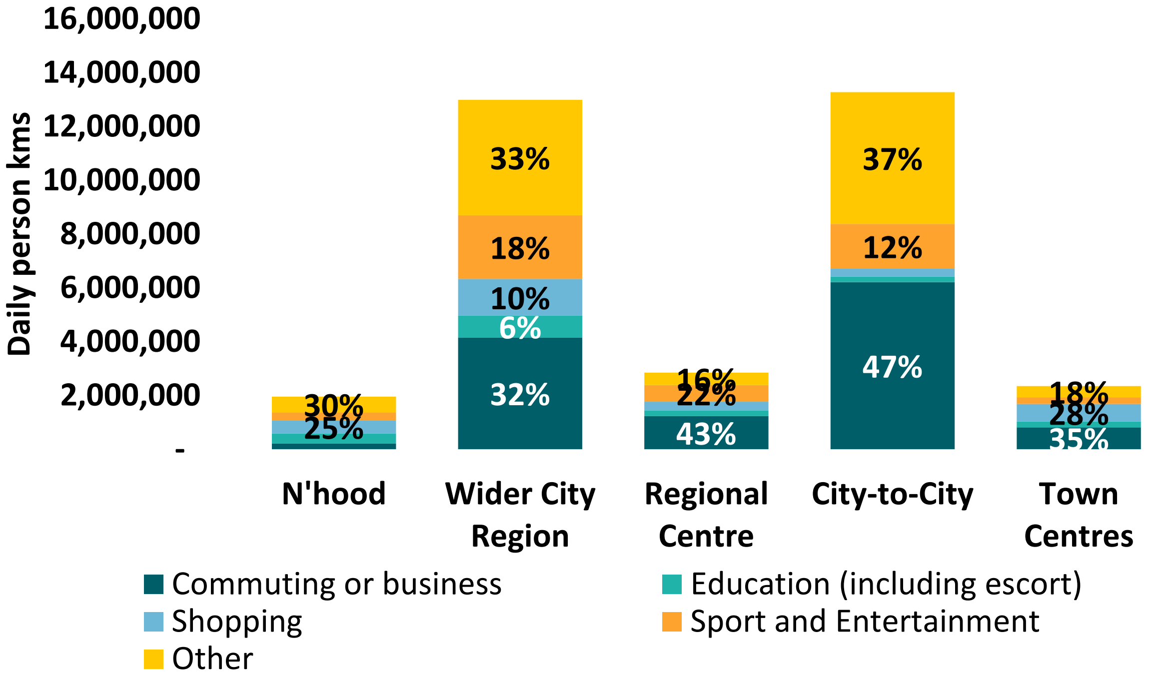
Figure 74: 2017 daily person kms by mode by people and place theme - GM residents



Source: GM TRADS (2017)

Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

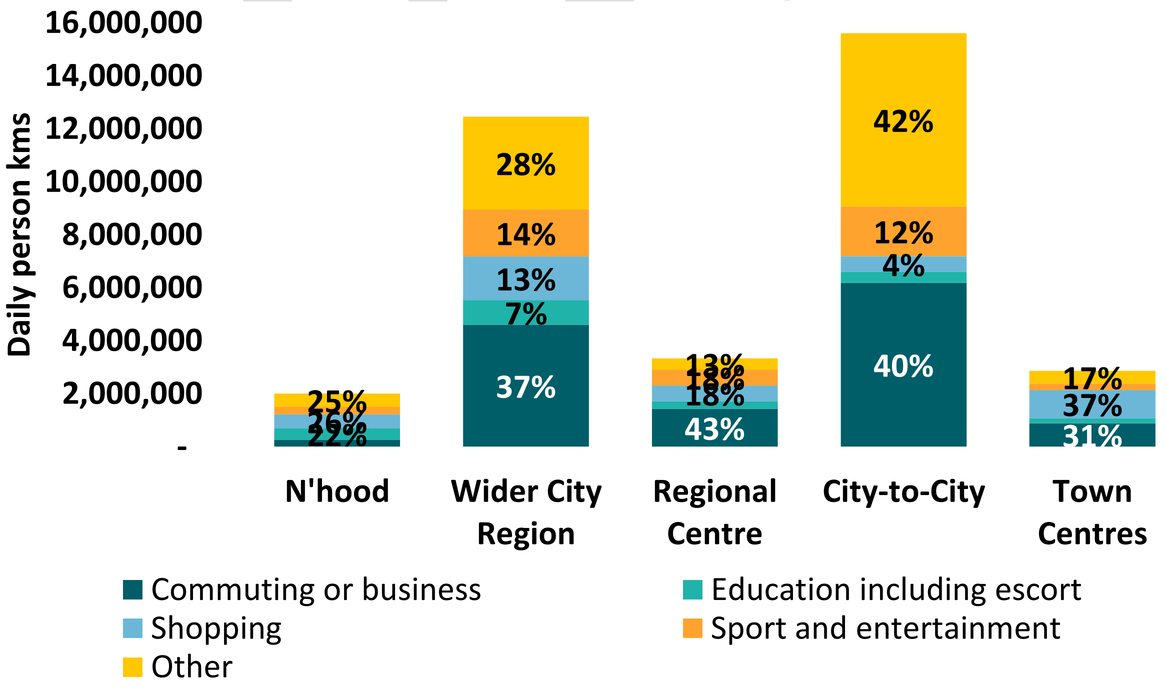
Figure 75: 2023 daily person kms by purpose by people and place theme - GM residents



Source: GM TRADS (2023)

Note: Other = visiting friends, personal business, escort other, and holiday and round trip

Figure 76: 2017 daily person kms by purpose by people and place theme - GM residents



Source: GM TRADS (2017)

Note: Other = visiting friends, personal business, escort other, and holiday and round trip

Annex 2: Other protected characteristics

Gender reassignment

Census 2021 asked all residents aged 16 and over about their gender identity. 129,000 (5.7%) residents chose not to answer the question. Of those who did answer the question the breakdown was as follows:

- c.2.14m (99.3%) identified the same as sex registered at birth
- c.6,500 (0.3%) identified differently from sex registered at birth but gave no specific identity
- c.2,500 (0.1%) identified as a Trans woman
- c.2,500 (0.1%) identified as a Trans man
- c.2,500 (0.1%) identified as another type of gender identity

Being married or in a civil partnership

Census 2021 asked all residents aged 16 and over about their legal partnership status. The breakdown was as follows:

- c.960,000 (42%) had never married and never registered a civil partnership
- c.640,000 (41%) were married or in a civil partnership
- c.54,000 (2%) were separated, but still legally married or in a civil partnership
- c.195,000 (9%) were divorced or civil partnership had been dissolved
- c.134,000 (6%) were widowed or surviving a civil partnership partner

Being pregnant or on maternity leave

Over the period between 2011 and 2021 the conception rate in GM for women aged between 15 and 44 has consistently been in the order of 8 per 100 on an annual basis.[25] Over this period, the proportion of conceptions leading to abortion in women aged between 15 and 44 has steadily increased from 22% in 2011, to 30% in 2021.

In 2022 alone, there were approximately 33,000 maternities (a pregnancy resulting in the birth of one or more children including stillbirths) in GM[26].

Disability

This is considered within Section 3.5.6 which considers health more broadly.

Religion or belief

Census 2021 asked all residents about their religion. 148,000 (5.1%) residents chose not to answer the question. Of those who did answer the question the breakdown was as follows:

- c.916,000 (33.7%) had no religious beliefs
- c.1.35m (49.5%) were Christian
- c.374,000 (13.7%) were Muslim
- c.28,000 (1.0%) were Jewish
- c.28,000 (1.0%) were Hindu
- c.9,500 (0.4%) were Buddhist
- c.7,500 (0.3%) were Sikh
- c.11,000 (0.4%) had other religious beliefs

[25] Conceptions in England and Wales - Office for National Statistics - conception statistics bring together records of birth registrations collected under the Births and Deaths Registration Act 1953 and of abortion notifications supplied under the Abortion Act 1967. They include all the pregnancies of women that lead to one of the following outcomes:

- a maternity at which one or more live births or stillbirths occur
- a termination of a pregnancy by abortion under the 1967 Act

Conception statistics do not include conceptions resulting in miscarriages or illegal abortions. Maternities that result in one or more live births or stillbirths are counted once only.

[26] Figures on births by gestation, ethnic group, IMD and area of usual residence, 2022 - Office for National Statistics (ons.gov.uk)

Sex

Census 2021 indicated a slight imbalance across the GM resident population with 50.7% female, and 49.3% male. The options available to respondents on this question in the Census were “female” and “male”.

While we don’t expect significant changes in the sex balance of GM residents, it is important to recognise that currently sex has a significant impact on travel habits. For example, historically our Travel Diary Survey data has shown that females are less likely to travel as a car driver or by cycle but are more likely to travel as car passenger or by bus.

Sexual orientation

Census 2021 asked all residents aged 16 and over about their sexual orientation. 158,000 (6.9%) residents chose not to answer the question. Of those who did answer the question the breakdown was as follows:

- c.2.04m (96.0%) identified as straight or heterosexual;
- c.45,000 (2.1%) identified as gay or lesbian;
- c.32,000 (1.5%) identified as bisexual; and
- c.8,000 (0.4%) identified as other sexual orientations.

Glossary

The terms in this glossary refer to their use in this document and may have different meaning when used in different contexts elsewhere.

2040 Right Mix target - our vision to improve our transport system so that we can reduce car use to no more than 50% of daily trips, with the remaining 50% made by active travel or public transport, while ensuring there is no increase in overall motor-vehicle traffic in GM.

Acorn – a geodemographic segmentation of the UK population, produced by the company CACI.

Acorn Categories – the UK population is segmented into six main Acorn Categories: Luxury Lifestyles; Established Affluence; Thriving Neighbourhoods; Steadfast Communities; Stretched Society; and Low Income Living.

- **Luxury Lifestyles** – the most affluent people in Britain, confident consumers with high levels of savings and investments, living in the most expensive properties. © CACI 2024
- **Established Affluence** – wealthy and successful people living in large houses which they own in affluent, high status areas of the country. © CACI 2024
- **Thriving Neighbourhoods** – comfortable, stable families and empty nesters who have a good standard of living, on an income above the UK average. © CACI 2024
- **Steadfast Communities** – this category contains much of middle of the road Britain with working families on incomes just below the UK average. © CACI 2024
- **Stretched Society** – traditional working class areas of Britain containing younger families, flat sharers and students privately renting their homes. © CACI 2024
- **Low Income Living** – this category contains the most deprived areas of towns and cities across the UK, with the lowest incomes. It contains a higher proportion of single people across the age groups, socially renting their flats. © CACI 2024

Active travel – travel by walking, wheeling, or cycling.

Bee Network - Greater Manchester's plan for a fully integrated public transport and active travel (walking, wheeling, and cycling) system. It aims to create a seamless, affordable, and accessible network, making it easier for people to travel around the region by various modes of transport.

Business Register and Employment Survey (BRES) – the BRES has two purposes, collecting data to update local unit information and business structures on the Inter-

Departmental Business Register (IDBR) and producing annual employment statistics which are published via both the Nomis website and the Office for National Statistics (ONS) website.

Car availability – the number of cars or vans owned or available for use by household members.

Carbon neutral – defined specifically for Greater Manchester as the point beyond which Greater Manchester's annual carbon dioxide emissions fall below a threshold level of 0.5MtCO2 (i.e. over 98% lower than 1990 levels).

Car keepership – is an extension of the term car or van ownership. It recognises that many cars or vans that people have available for their personal use aren't owned by them. For example, those who can use their work car or van for personal use.

Cars per head – a measure of the number of cars in private keepership set against the resident population for a specified geographic area.

Census – the official survey the of UK population. It occurs every ten years and collects key information about the population, such as age and gender. The last census was in 2021. In this report the statistics used from the census are car keepership and tenure.

Comparison goods – non-essential retail items such as clothing, electronics, and furniture, often used in retail analysis.

Concessionary travel – discounted or free travel provided to eligible groups such as older adults or disabled people.

Escort – an escort trip is one made with the sole purpose of accompanying one or more people to a destination. For example, taking a child to school, or taking a relative to an appointment.

English Indices of Deprivation – an attempt to measure a broader concept of multiple deprivation, made up of several distinct dimensions, or domains, of deprivation. The English Indices of Deprivation can be used to rank every LSOA in England according to their relative level of deprivation. More information can be found at gov.uk/government/statistics/english-indices-of-deprivation-2019.

Greater Manchester Accessibility Level (GMAL) – a measure of public transport accessibility used in land use and transport planning.

GM Travel Diary Survey (TRADS) – collects transport and travel information from all residents of 2,000 households per year; gathering data regarding all trips made by each resident over 4 years of age in a 24-hour period. TRADS is not an attitudinal survey; its focus is on the details of the trips and the characteristics of the people who make those trips.

GM Transport Strategy 2040 – sets out GM's long-term ambition for transport. More information can be found at tfgm.com/2040-transport-strategy.

Gross Value Added (GVA) - the value generated by any unit engaged in the production of goods and services. GVA is calculated by subtracting the cost of intermediate inputs (like raw materials) from the total value of the goods and services produced.

High-density – an area with a high or relatively high population or number of buildings.

Higher education – in this report, this covers education for anyone aged 19 or older. It includes things like vocational certificates and apprenticeship training.

Hybrid working – a working arrangement where employees split time between home and a workplace.

Inclusive growth – economic growth that is distributed fairly across society and creates opportunities for all.

Internal migration - residential moves between local authorities and regions in England and Wales, as well as moves to or from the rest of the UK (Scotland and Northern Ireland). It excludes moves within a single local authority, as well as international moves into or out of the UK.

Journey purpose – the activity at a trip's destination unless the destination is 'home', and in some cases 'work'; in these situations, the purpose is the activity at the origin of the trip.

- **Commuting or business** – trips to a usual place of work (including voluntary work) from home, or from work to home. Trips during work that are part of the job (eg attending a business meeting). Does not include trips where driving is part of the job (eg taxi driver).
- **Education (including escort)** – all trips to school/college/university etc by full-time students, students on day-release and part time students following vocational courses. Trips from education that end at home. Accompanying children to school and trip returning home.
- **Shopping** – all trips to shops, and trips from shops to/from home or work, even if there was no intention to buy.
- **Sport or entertainment** – all trips to entertainment, recreation, participation in sport, pubs/cafes/restaurants etc, and all trips from these places to home.
- **Other** – combines the following trips

- **Escort other** – trips to escort someone/something to somewhere other than an education establishment. Trips from escorting someone/something to home.
- **Holidays or round trips** – trips (within Great Britain) to or from any holiday (excluding overnight stays with friends or relatives), or trips for pleasure (not otherwise classified as social or entertainment) within a single day.
- **Personal business** – trips to use services (eg, bank, hairdresser, library), health or medical visit, worship or other religious observance, staying at hotel/other temporary accommodation. Trips from these places to home or work.
- **Visiting friends** – all trips to visit friends or relatives (including overnight stay). Trips from visiting friends or relatives to home.

Local Authority areas – local authorities are the bodies responsible for the delivery of local services. There are ten areas in GM that have their own local authority: Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, and Wigan.

Main mode – the method of travel used for the stage of the trip that covered the longest distance (also see main method of travel) – eg walking, cycling, Metrolink.

Method of travel – the method of travel used for the stage of the trip that covered the longest distance (also see main mode) – eg walking, cycling, Metrolink.

Metrolink – the tram/light rail system in GM.

Mode share – refers to the percentage distribution of trips taken by GM residents using different modes.

Mortgage – occupants live in a property that has been bought with a loan (typically from a bank or building society) and that loan is in the process of being paid off.

Owned outright - where the household owns all of the accommodation.

Peak period – the busiest or most popular time.

People and place theme – the GM Transport Strategy 2040 sets out five different trip types. This enables us to develop integrated projects and interventions for the many different types of journeys that happen across GM. More information can be found at tfgm.com/2040-transport-strategy. This document also includes references to a new Town Centres people and place theme which has been introduced to reflect the important role that Town Centres will play in helping to deliver our 2040 Right Mix target.

Person kms – (or person kilometres) is a unit of measurement to quantify the total distance travelled by people. For example, if 20 people travel 2km on a bus the person kilometres will be 40km, while the vehicle kilometres will only be 2km.

Pre-pandemic – the period before March 2020.

Private rental sector – the sector of residential households where residents rent through a private landlord or letting agent.

Protected characteristics – characteristics protected under the Equality Act 2010, including age, disability, gender reassignment, race, religion, sex, and sexual orientation.

Public transport – includes buses, trains, and trams.

Rail-based modes – includes both light (trams) and heavy rail (trains).

Rapid transit - In GM, rapid transit is a public transport service mainly focussed on middle distance trips that is:

- **Faster than local bus services**. Local bus services with closely spaced stops are good for serving shorter distance trips, for middle distance trips, faster journeys with fewer stops are critical.
- **More frequent than city-to-city services**. Inter-city and regional trains and coaches are good for serving longer distance trips. For middle distance trips, services need to run more frequently.
- **Able to move large numbers of people.** Rapid transit uses dedicated routeways, with a high degree of segregation, to serve major passenger flows concentrated on key corridors.

Right Mix pathway – a plausible set of changes and interventions to achieve the 2040 Right Mix target. There are endless different ways in which the 2040 Right Mix target could be achieved – illustrative pathways support adaptive transport planning.

Social rent – residents in households that are rented through a local council or housing association.

Streets for All – Streets for All is our approach to everything we do on streets in Greater Manchester. Streets for All places a strong emphasis on reducing traffic and road danger, and on improving the street environment for everyone travelling along, spending time in, or living on them. This people-centred approach to street planning, design and network management is needed to deliver the Bee Network, support growth and productivity and enable us to meet our decarbonisation targets.

Tenure – the type of ownership someone has over a property and its land (eg social rent, private rent (incl. rent free), mortgage (incl. shared ownership), owned outright).

Transport-related social exclusion (TRSE) – being unable to access opportunities, key services, and community life as much as needed, and facing major obstacles in everyday life through the wider impacts of having to travel to access key destinations.

Travel market – all travel by GM residents associated with a specified type of activity or activities - eg education travel market which as well as including pupils whose journey purpose is education, also includes travel by staff delivering education whose journey purpose is commuting.

Trip – a complete one-way journey, with an origin and destination. Outward and return halves of a return trip are treated as two separate trips. Round trips are an exception to this rule and are split into two trips, with the point furthest from the origin being treated as the destination for trip one and vice versa for trip two. A trip can include multiple stages, which are defined as a change in the mode used, or a change to a different vehicle of the same type.

Trip redistribution - the reallocation of trips across different people and place themes (e.g. from Wider City Region to Regional Centre).

Trips per person per day – the total number of annual trips made by GM residents, divided by the number of days in the year, divided by the GM population aged 5+.

Typical/average day – TRADS provides annual estimates for trips. Therefore, a typical/average day in this context is simply the annual estimate divided by the number of days in the year.

Ultra Low Emission Vehicles (ULEVs) – a vehicle with reported tailpipe CO2 emissions of less than 75 g/km.

Vision Zero – Greater Manchester's long-term commitment to eliminating road deaths and life-changing injuries by 2040.