Transport for Greater Manchester

Travel Diary Survey 2024 – Main Report

Version 1

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Acknowledgements

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Executive Summary

This document presents the key findings from the Greater Manchester Travel Diary Survey (TRADS) in 2024. Other sources are used to provide relevant context. TRADS estimates the travel behaviour of Greater Manchester residents on a 'typical day'. Key findings for 2024 are:

How many trips did GM residents make?

- There were 5.9 million trips by GM residents on a typical day in 2024, slightly above the 2016-2018 peak of 5.8 million.
- Over a quarter of GM residents did not travel on a typical day.
- GM residents travelled 33 million kilometres on a typical day (similar to pre-pandemic levels). This indicates that while residents made fewer trips per person in 2024 than pre-pandemic years, the trips they did make were slightly longer on average.

How did GM residents travel?

- Car remains the dominant way of travelling, accounting for nearly 60% of all trips by GM residents, and around three-quarters of the distance travelled. The car share of total distance travelled by GM residents (73%) was slightly down on pre-pandemic levels (77%). Walking accounted for 30% of the trips by GM residents, but only 4% of the distance. Public transport accounted for 7% of the trips, and 17% of the distance.
- 15% of car trips were 1km or less, equating to about 185 million annual car journeys by GM residents. These could have been walked in around 15 minutes or cycled in around 4 minutes.
- City-to-City car trips to/from outside of GM accounted for just 5% of all car trips by GM residents, but 39% of the total distance travelled by GM residents in cars.
- A small proportion of frequent users generated most trips across all types of public transport. In the case of bus, over 75% of trips were made by just 11% of GM residents (ie those who used the bus at least three or four days a week).
- Our least affluent ('Stretched Society' and 'Low Income Living') residents accounted for 69% of all bus trips made by GM residents, despite only representing 45% of the GM resident population.

Why did GM residents travel?

- Shopping (20%), education - including escort - (19%), and commuting and business (17%) were the three most common trip purposes.
- Collectively, commuting and business, and 'other' (eg visiting friends, personal business) accounted for two thirds of the total distance travelled by GM residents.

- A third of all person km travelled were accounted for by the commuting and business category, but the total distance travelled for this purpose was down by over 20% compared to 2016-18 levels.

When did GM residents travel?

- GM residents started nearly nine-in-ten of their trips (86%) in the 12 hours between 7am and 7pm, while 8% of their trips started between 7pm and 10pm. Only 10% of trips started between 8pm and 7am, of which 64% were by private vehicle (compared to 59% outside these hours).
- The peak periods for trip making were 8am-9am and 3pm-4pm, accounting for nearly a quarter of all trips by GM residents. During these hours, over half of trips were for education.
- Around three-in-ten trips by GM residents in the periods 7am-9am and 4pm-6pm were to/from work/business. 50% of all GM resident commuting and business trips were made outside these periods.

Car availability in GM

- Between 2011 and 2021, the number of licensed, privately kept cars in GM grew by 13%, exceeding the 7% growth in the GM population.
- Private car keeping on a per head basis had been increasing in GM until 2022. At the end of 2024, there were well over 1.2m licensed cars or vans being kept privately in GM, which equated to roughly one car per two residents aged 17 or over.
- 25% of households had no access to a car/van, rising to around half in the least affluent households, as classified by Acorn, while for the most affluent households it can be expected that they will nearly always have a car/van available.
- Residents in households with no cars were seven times more likely to use a bus for their journeys than residents in households where there was at least one car per adult.
- Residents with no cars or vans in their households made 87% of their trips by active travel or public transport. While in households where there were fewer cars than adults, 36% of trips were by active travel or public transport. In households where there was at least one car per adult, only 27% of trips were by active travel or public transport.

1. Introduction

1.1 Purpose of document

This document provides a picture of the travel behaviour of Greater Manchester (GM) residents in 2024. Some recent trends are presented to help place 2024 data in context.

The main dataset underpinning this document is the Greater Manchester Travel Diary Survey (TRADS). TRADS provides a comprehensive picture of the travel of GM residents, but it has some limitations. For example, the fact that TRADS has been designed to capture a 'typical day' means that it is not suited to exploring seasonal trends. More information about TRADS is provided in the Appendix.

This document excludes travel by non-residents in GM and does not address policy interventions needed to achieve the 2040 Right Mix (see Glossary for definition). For policy and delivery proposals, refer to the GM Transport Strategy 2050, the Transport Delivery Plan and associated evidence reports. At the time of writing, draft versions of these documents were open for public consultation. Our currently adopted strategy and delivery plan documents are available on the TfGM website (https://tfgm.com/strategy).

1.2 TRADS in the context of our wider strategic research programme

TRADS is part of a broader strategic research programme that provides insight to shape decision-making, and the people and place focused change that supports our long-term ambitions. Figure 1 summarises other aspects of our strategic research programme.

The most valuable insight often comes from combining different datasets, and this includes from external research sources, which we use to supplement our own research.

Figure 1: Summary of Strategic Research Programme[1]

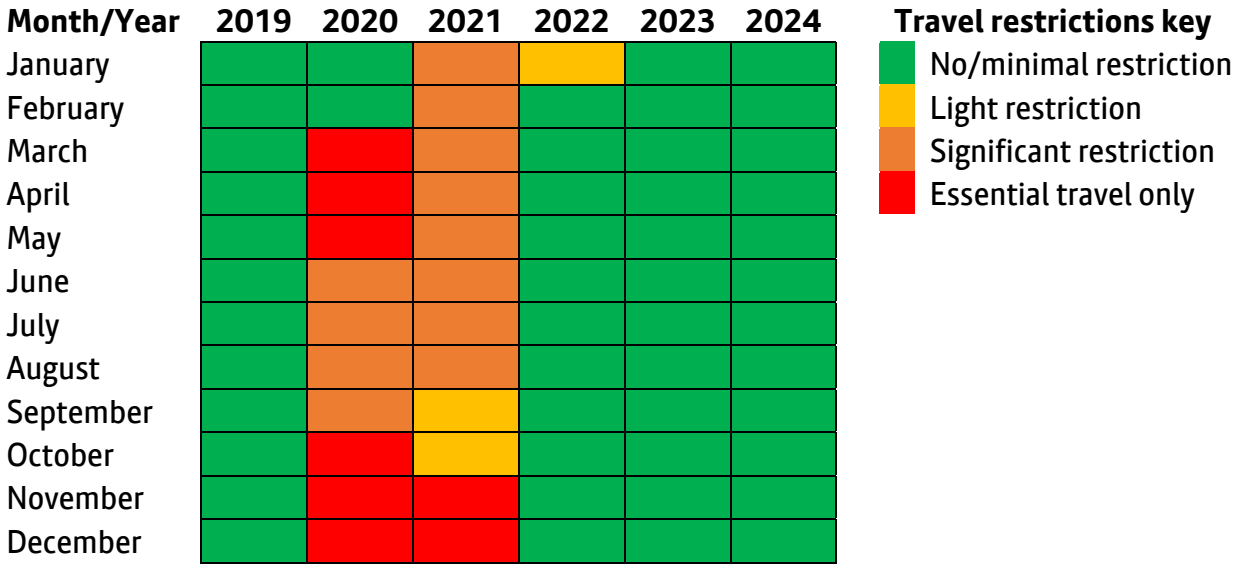
Strategic Research Item	Frequency	Key Strength
TRADS	**On-going**	**Travel behaviour of GM residents**
Network Monitoring	Annual	Long-term trends on network volumes
Evaluation research	Bespoke	Accountability, Evidence of what works for current schemes and for future scheme development

[1] More details can be found at https://tfgm.com/data-analytics-and-insight

1.3 Impact of the pandemic on the TRADS research programme

The pandemic and related travel restrictions had a significant impact on both travel behaviour and our ability to undertake travel research. Figure 2 below shows the restrictions that were in place by month between 2019 and 2024.

Figure 2: Pandemic travel restrictions by month



During 2020 and 2021, the TRADS research programme was severely disrupted by the pandemic. Face-to-face surveys were either postponed or replaced by alternative data collection methods. The tightening and loosening of restrictions during the survey period resulted in extreme changes to residents' travel behaviour. This meant we were unable to assess a 'typical day' for 2020 and 2021, as we had in previous years.

As Figure 2 shows, 2022 did not have any significant periods of restrictions. As a result, we were able to re-establish our research programme and are confident the data from 2022 can be used in a similar way to pre-pandemic data.

Estimates of travel behaviour from TRADS for 2022 and 2023 were still undoubtedly influenced by the pandemic. Both years are 'atypical' in that residents' travel behaviours were changing significantly over the period, as we continued to move away from the pandemic. The continued rapid growth in trips, especially on public transport, has led to some irregularities, as TRADS approximates a 'typical day' across the year.

For 2022, the tram trip estimates in TRADS were lower than we would expect given the data available from ticket sales. Analysis of the survey data found that the likely cause of this is that patronage grew significantly over the course of the year. The sampling of households in TRADS is random, but in 2022 tram users (and those living close to stops) tended to be surveyed earlier in the year when usage was lower. Overall, TRADS is missing around 20,000 daily tram trips for 2022. Therefore, the impact on the overall trip

estimates is negligible, as there were nearly 5 million daily trips in 2022. That said, caution should still be used when interpreting charts in this report that contain tram trip estimates for 2022.

For 2023, the bus trip estimates in TRADS are lower than we would expect given the patronage data. While this could be an issue related to the collection of the data since the pandemic, the possibility of this being an extreme estimate, which can occasionally occur in survey data, cannot be ruled out. Further details about this issue are provided in the appendix.

Starting next year, we plan to resume the practice of combining datasets across multiple years (eg 2024 and 2025), as was standard prior to the COVID-19 pandemic. This approach allows us to achieve greater statistical confidence in our sub-category estimates by increasing sample sizes and smoothing out short-term variability.

We have not combined datasets in recent years due to the significant disruption and volatility in travel patterns caused by the pandemic. During this period, the travel market was in flux, and data from previous years was not sufficiently representative of current conditions. However, we now believe that travel behaviour has stabilised to a degree that will mean estimates based on a multi-year dataset will be both meaningful and reliable.

1.4 Comparing TRADS and the National Travel Survey (NTS)

Like TRADS, NTS is a household survey designed to monitor long-term trends in personal travel and to inform the development of policy. NTS is a Department for Transport survey and is the primary source of data on personal travel patterns by residents of England within Great Britain.

While NTS and TRADS both collect information on how, why, when and where people travel, as well as factors affecting travel (for example, car availability and driving licence holding), TRADS provides a deeper and more robust understanding of travel by GM residents due to its higher sample size in GM.

Figure 3 shows some 2024 headlines for both TRADS and NTS, but it is important to note that due to methodological differences the two surveys are not directly comparable. As an example, NTS uses a 7-day travel diary instead of the 1-day approach used in TRADS. It is our intention to continue to explore the relationship between TRADS and NTS, and we intend to report back on this in our TRADS 2025 Main Report.

Figure 3: Selected 2024 headlines for GM (TRADS) and England (NTS)

Category	GM 2024 (TRADS)	England 2024 (NTS)
Average trips per person per year	771	736[2]
Average distance travelled per person per year (miles)	2,719*	6,082*
Average time spent travelling per person per year (hours)	258**	362**
Car driver or passenger share (trips)	57%	59%
Active travel share (trips)	33%	31%
Public transport share (trips)	7%	8%
Commuting and business share (trips)	17%	15%
Education incl. escort share (trips)	19%	13%
Shopping share (trips)	20%	18%
No car or van share (households)	25%	22%

Source: GM TRADS (2024), NTS (2024) Tables NTS0205a, NTS0303, NTS0403

*GM TRADS and NTS calculate trip distance in two different ways. The trip distance reported for TRADS in this document is simply the straight-line distance between the origin and destination of a trip. The trip distance in the NTS measured with geocoded route distances, which accounts for things like road curvature, turns and junctions, and geographic barriers (eg rivers, parks). A study comparing straight-line vs. route-based distances found that straight-line distances underestimated actual travel by 15–30%, depending on the region (https://blog.cdxtech.com/post/straight-line-distance-as-an-estimate-for-driving-routes).

**The calculation of 'average time spent travelling per person per year (hours)' is directly linked to estimates of distance travelled, which as explained above are currently based on different methodologies in TRADS and NTS.

1.5 People and Place categories

Our emerging Local Transport Plan is structured, in part, around a set of 'People and Place' categories. These categories segment a complex travel market into different trips. Segmenting travel into different trip types enables us to develop integrated projects and interventions for the various types of journeys that happen across GM, from trips to the shops in local neighbourhoods, to cross city commutes.

We also use the People and Place categories to help articulate the changes in travel behaviour that we are targeting to deliver our 2040 Right Mix vision.

This document presents analysis for the following People and Place categories:

[2] NTS value relates to all trips per person per year (excluding walks of less than a mile)

- **Neighbourhood trips** – less than 2km (straight line), with one end in GM. Excludes trips defined as Regional Centre or Town Centres trips
- **Wider City Region trips** – one end in GM and both ends no more than 10km outside of GM boundary. Excludes trips defined as Regional Centre, Town Centres, or Neighbourhood trips
- **Regional Centre trips** – at least one end in the regional centre. Excludes trips with either end more than 10km outside the GM boundary
- **City-to-City trips** – one end in GM and one end more than 10km outside the GM boundary
- **Town Centres trips** – at least one end in a town centre, and neither end more than 10km outside the GM boundary.

All five People and Place categories exclude trips with a non-work attraction end at Manchester Airport – these trips would likely be captured by our Global category which is not covered in this document, as TRADS is not appropriate for capturing insight on this.

More information about how these People and Place categories have been defined is provided in the Appendix.

1.6 Trip purpose categories

This report contains references to trip purposes – these are the reasons that cause people to travel (ie why they made their trip). A trip is a complete one-way journey, with an origin and destination. Outward and return halves of a return trip are treated as two separate trips.

For example, a journey to the shop and back contains two trips, one to the shop and one back from the shop, and both are classed as trips for the purpose of shopping.

The purposes used in this report are:

- **Commuting and business** – trips to/from work, or during work as part of the job
- **Education (including escort)** – trips by students to places of education (including those on day-release and vocational courses); accompanying someone on these trips (ie escort)
- **Shopping** – trips to shops even if there is no intention to buy
- **Sport and entertainment** – trips for entertainment and recreational purposes, to participate in sport, go to pubs/cafes/restaurants etc
- **Other** – trips include:

- Escort other – trips to escort someone/something to somewhere other than an education establishment
- 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. Includes people just going for a walk, which is why a large proportion are walking trips
- 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
- Visiting friends – all trips to visit friends or relatives (including overnight stay).

More information about how trip purposes are defined is provided in the Appendix.

1.7 Main type of travel

This report contains references to the transport mix (ie the proportions of trips taken by GM residents on different types of travel). These are based on the 'main' type of travel, which is defined as the method of travel used for the stage(s) that covered the longest distance of the trip in question.

2. How many trips did GM residents make?

2.1 Key facts summary - How many trips did GM residents make?

On a typical day in 2024...

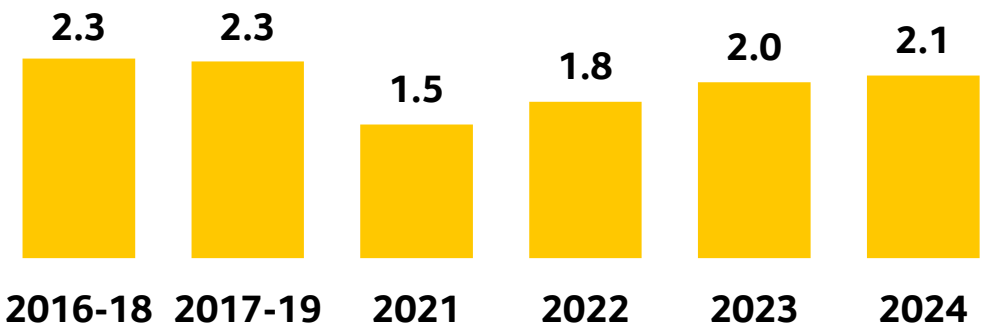
- There were 5.9 million trips by GM residents, up from 5.6 million in 2023, and above the 2016-2018 peak of 5.8 million.
- On average, each GM resident (aged 5 or over) made 2.1 trips per day.
- Over a quarter of GM residents did not travel.

2.2 Total number of trips per person per day - GM residents

Before the pandemic, GM residents made an average of 2.3 trips per person per day, which totalled about 5.8m daily trips. During 2021, this fell dramatically to just 1.5 trips per person per day (4.1m daily trips). The recovery from the pandemic was evident in the increase to 2.1 trips per person per day during 2024. Long-term growth in the number of people living in GM has helped **the total number of daily trips in 2024 increase to 5.9 million, which is slightly above pre-pandemic levels.**

In 2024, the average GM resident made 771 trips a year, down from 844 trips a year during 2016-18, a 9% reduction.

Figure 4: Average (mean) trips per person per day - GM residents



Source: GM TRADS (2016-18, 2017-19, 2021, 2022, 2023, 2024)

2.3 Total number of trips per person per day - national picture

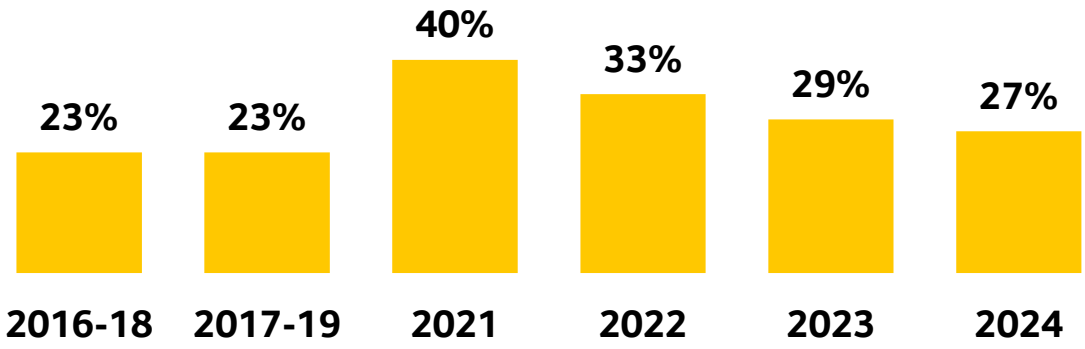
According to the National Travel Survey, the average number of trips per person per day has been declining slowly at a national-level over the last 20 years, falling from 2.4 in 2002 to 2.1 in 2019 (which is below the 2.3 by trips per person per day in 2019 by GM residents).

This decline in the national trip rate per person has been seen for most trip purposes. For example, between 2002 and 2019 commute trips declined by 15%, shopping trips declined by 19%, business trips declined by 21%, and visiting friends declined by 33%[3].

2.4 Percentage of GM residents not travelling on an average day

Before the pandemic, less than a quarter of GM residents didn't travel on an average day. In 2021, a year when many travel restrictions were in place, this dramatically increased to 40%. In 2024, the percentage of GM residents not travelling dropped to 27%, meaning **the number of residents that did not travel at all on a typical day was still 4 percentage points higher than before the pandemic.**

Figure 5: Percentage of GM residents not travelling on an average day



Source: GM TRADS (2016-18, 2017-19, 2021, 2022, 2023, 2024)

[3] National Travel Survey, 2021

3. How did GM residents travel?

This section contains references to the 'transport mix' - the distribution of trips taken by GM residents using different types of travel. The transport mix is based on the 'main' type of travel, which is defined as the method of travel used for the stage(s) that covered the longest distance of the trip in question.

3.1 Key facts summary - How did GM residents travel?

On a typical day in 2024...

- Across all modes of travel, GM residents travelled 33 million kilometres, which is similar to pre-pandemic levels. This indicates that while residents made fewer trips per person in 2024 than pre-pandemic, the trips they made were slightly longer on average.
- Car was the dominant way of travelling, accounting for nearly 60% of all trips by GM residents, and around three-quarters of the distance travelled. The car share of total distance travelled by GM residents (73%) was slightly down on pre-pandemic levels (77%). Walking accounted for 30% of the trips by GM residents, but only 4% of the distance. Public transport accounted for 7% of the trips, and 17% of the distance.
- City-to-City car trips accounted for just 5% of all car trips made by GM residents, but 39% of the total distance travelled by GM residents in cars.
- 40% of the distance travelled by GM residents was by trips with at least one end beyond 10km of Greater Manchester.
- 15% of car trips were 1km or less, equating to about 185 million annual car journeys by GM residents. These could have been walked in around 15 minutes or cycled in around 4 minutes.
- A small proportion of frequent users generated most trips across all types of public transport. In the case of bus, over 75% of trips were made by just 12% of GM residents (those who used the bus at least three or four days a week).
- Our least affluent ('Stretched Society' and 'Low Income Living') residents accounted for 69% of all bus trips made by GM residents, despite only representing 45% of the GM resident population.

3.2 Transport mix of trips in 2024

In 2024, the most used method of travel was car or van (including passenger), making up nearly three-in-five trips by GM residents. A third of trips were made by

active travel (30% walking and 3% cycling), while about one-in-fourteen trips were made by public transport (5% bus and 2% train/tram). The remaining 3% of trips were made by taxi, minicab, motorcycle, scooter, moped, or any other type of vehicle.

Figure 6: Trip transport mix by GM residents – 2024

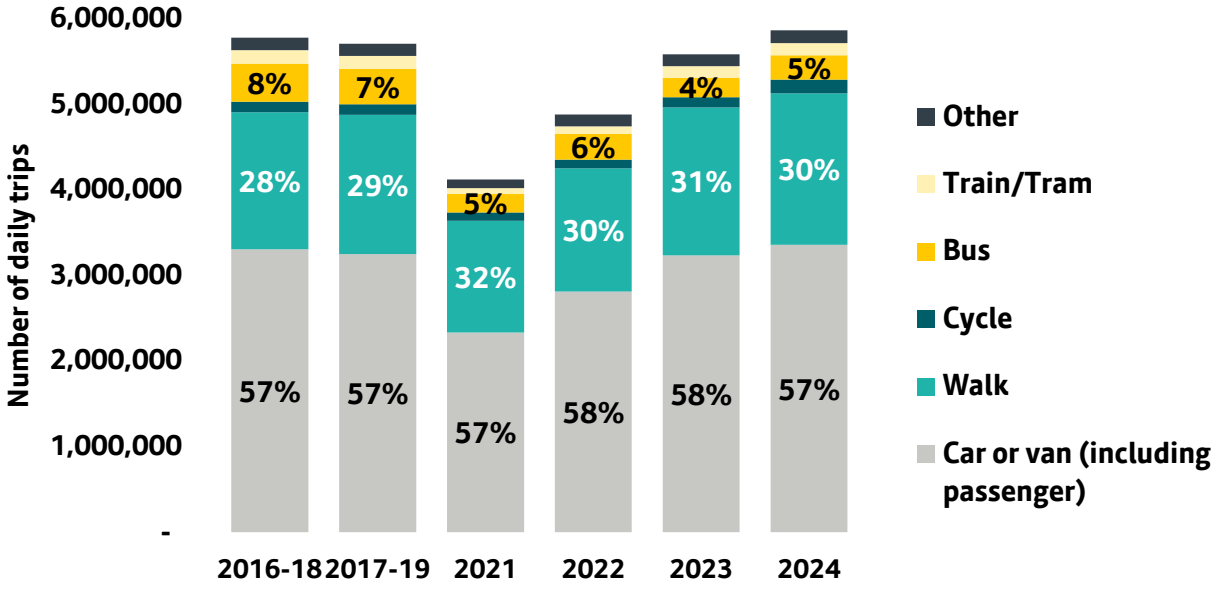
Source: GM TRADS 2024
Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

3.3 Transport mix comparison to previous years

The length of each bar in Figure 7 below represents the total number of daily trips by GM residents by year. For example, in 2021, GM residents made about 4 million daily trips. The figures in each bar show the percentage of daily trips that were made by each type of travel. For example, in 2021, it shows that 57% of trips were made by car or van (including passenger).

While the overall number of trips for each method of travel has fluctuated since the start of the pandemic, the transport mix has remained relatively stable. In 2024, car trips made up nearly three-in-five trips, active travel made up around a third of trips, and broadly one in ten trips used public transport or taxi / minicab.

Figure 7: Daily trip count and transport mix - GM residents



Source: GM TRADS (2016-18, 2017-19, 2021, 2022, 2023, 2024)
Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

Our 2040 Right Mix vision targets half of all trips being made by either active travel or public transport. The most significant progress towards the 2040 Right Mix vision was always expected to occur later in this decade and the next decade. However, the fact that the proportion of trips by car or van has not decreased between 2016-18 and 2024 increases the challenge we now face in achieving the 2040 Right Mix Vision.

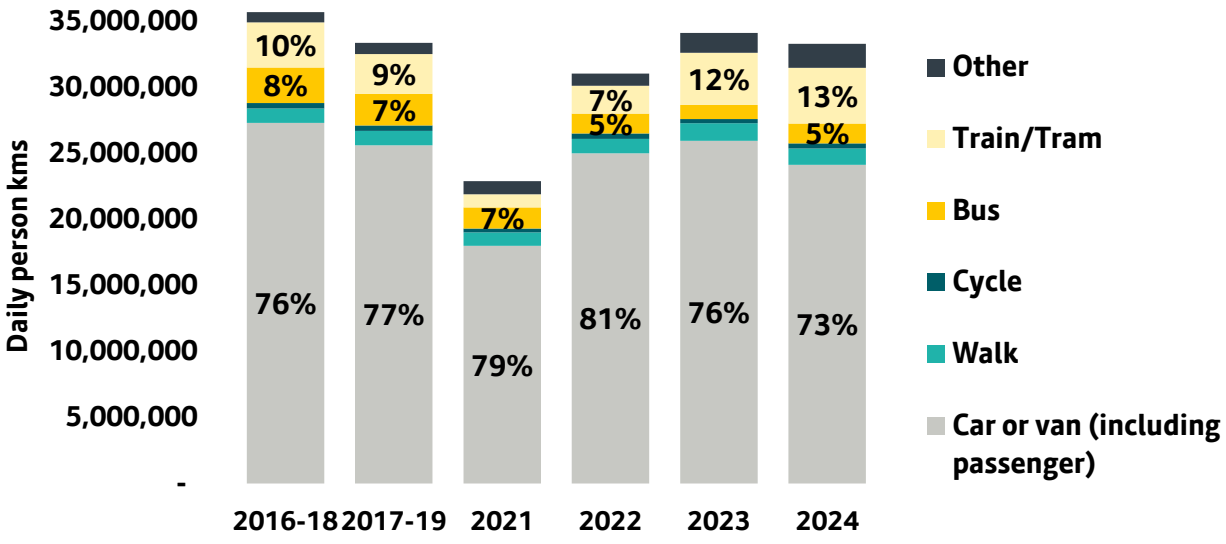
3.4 Transport mix of distance travelled (person km)

The length of each bar in Figure 8 below shows the total daily distance GM residents travel (in kilometres) by year. For example, in 2021, it shows that GM residents travelled over 20 million kilometres each day. The figures in each bar show the percentage of the distance travelled by each type of travel. For example, in 2021, 79% of the distance travelled was by car or van (including passenger).

Prior to the onset of the pandemic, the total distance travelled by GM residents was reducing. The pandemic resulted in a sharp drop but there was a significant rebound to 2023, with the total distance travelled in 2023 being 2% above the 2017-19 survey period. The total distance travelled in 2024 was down 2% on 2023.

In 2024, the share of the total distance travelled by car or van (including passenger) was 73%, which was slightly down on pre-pandemic levels. The share of the total distance travelled by public transport has returned to pre-pandemic levels: 18% in 2024.

Figure 8: Daily person km and transport mix - GM residents



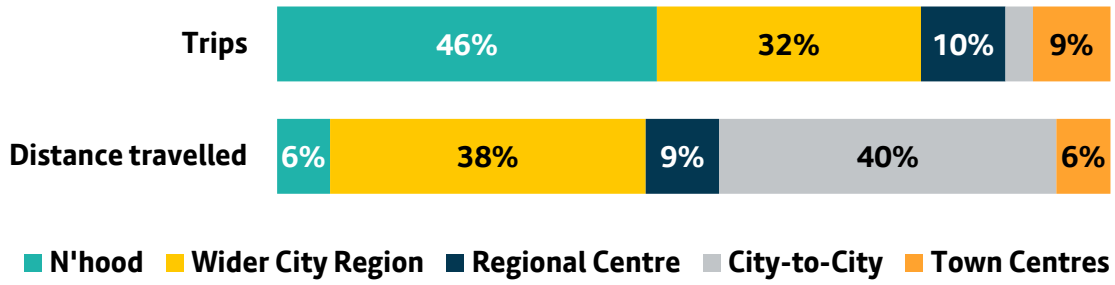
Source: GM TRADS (2016-18, 2017-19, 2021, 2022, 2023, 2024)
Note: Other = taxi, minicab, motorcycle, scooter, moped, or any other

3.5 People and Place categories overview - 2024

In 2024, nearly four-fifths of the trips made by GM residents were either Neighbourhood (46%) or Wider City Region (32%) trips. The strategic importance of our Regional Centre and Town Centres was reflected in the fact that those People and Place categories together accounted for nearly 20% of trips by GM residents.

In terms of distance travelled, the narrative is very different. Neighbourhood trips are less than 2km in length and therefore only accounted for 6% of the distance travelled by GM residents. Conversely, **City-to-City trips are at least 10km in length and consequently represented 40% of the distance travelled by GM residents, despite only accounting for 3% of trips.**

Figure 9: Trips and distance travelled by GM residents by People and Place categories

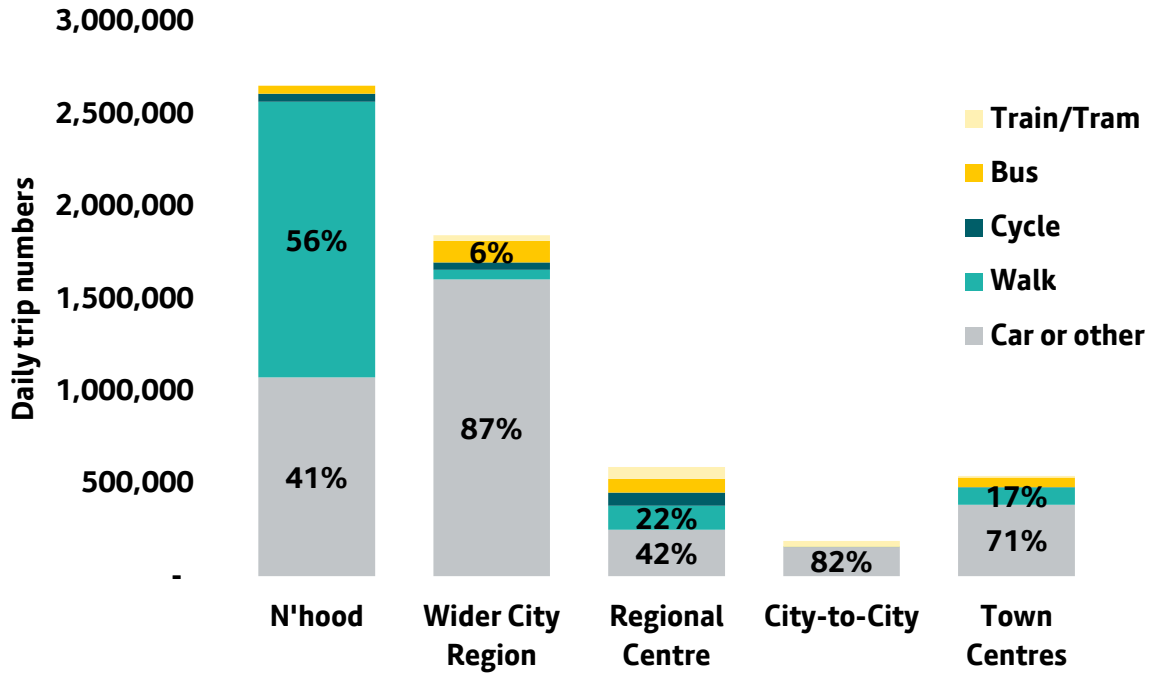


Source: GM TRADS 2024

3.6 Trips and distance travelled by different types of travel by People and Place categories - 2024

The length of each bar in Figure 10 shows the total number of daily trips by GM residents, by People and Place categories. For example, it shows that GM residents made just over 2.5 million daily Neighbourhood trips. The figures in each bar show the percentage of the total daily trips that were made by each type of travel. For example, it shows that 41% of Neighbourhood trips were made by 'car or other'.

Figure 10: Daily trips and transport mix by People and Place categories - GM residents

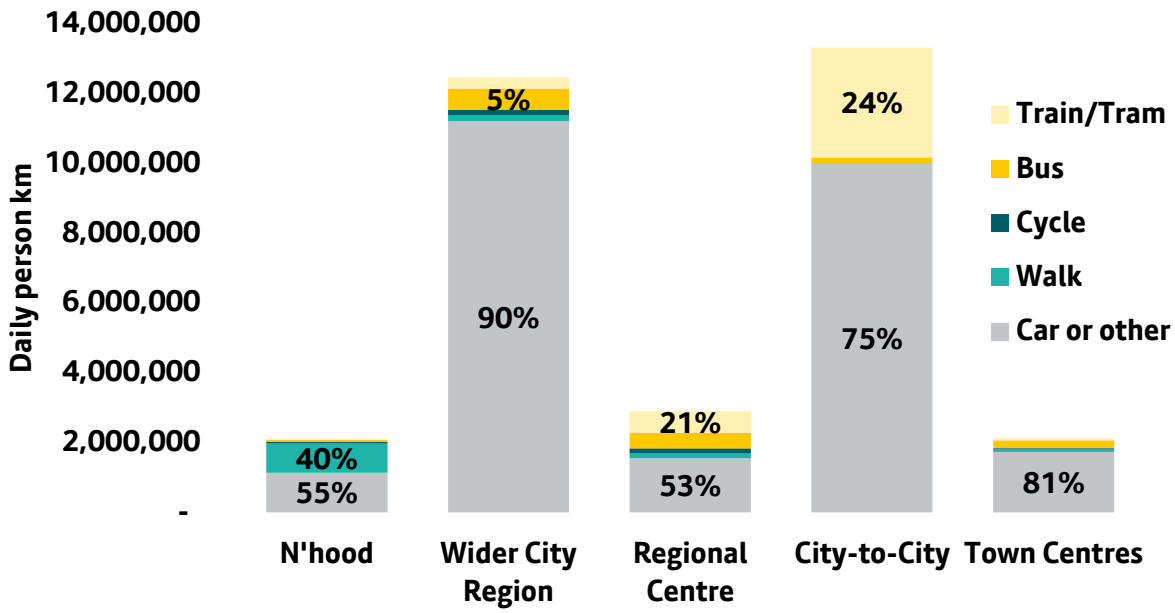


Source: GM TRADS 2024

Note: car or other = car or van (driver), car or van (passenger), taxi, minicab, motorcycle, scooter, moped, or any other

The length of each bar in Figure 11 shows the total daily distance GM residents travelled (in kilometres) by People and Place categories. For example, it shows that, for the Neighbourhood People and Place category, GM residents travelled around 2 million kilometres each day. The figures in each bar show the percentage of the distance travelled by each type of travel. For example, it shows that for the Neighbourhood People and Place category, 55% of the distance travelled was by 'car or other'.

Figure 11: Daily person km and transport mix by People and Place categories - GM residents



Source: GM TRADS 2024
Note: car or other = car or van (driver), car or van (passenger), taxi, minicab, motorcycle, scooter, moped, or any other

3.6.1 Neighbourhood

On average, GM residents made approximately 2.6 million Neighbourhood trips a day, about 46% of all trips. Neighbourhood trips accounted for:

- Nearly 1.5 million walking trips, which represented 84% of all walking trips
- Around 1.1 million 'car or other' trips, which represented 31% of all 'car or other' trips
- Nearly 30% of all cycling trips
- About one-in-seven of all bus trips.

Neighbourhood trips are less than 2km in length. Consequently, these 46% of trips only accounted for 6% of the total distance travelled by GM residents. Neighbourhood trips accounted for:

- Just over two-thirds of all the distance travelled by walking.

3.6.2 Wider City Region

On average, GM residents made over 1.8 million Wider City Region trips a day, which was around a third of all trips. Wider City Region trips accounted for:

- Around 1.6 million private vehicle trips, which represented just under half of all private vehicle trips

- Around 115,000 bus trips, which represented 41% of all bus trips.

Wider City Region trips accounted for 32% of all trips by GM residents and, due to the longer and more dispersed nature of these trips, they also accounted for nearly 40% of the total distance travelled.

- Private vehicles accounted for 90% of all distance travelled within the Wider City Region, which represented 44% of all distance travelled in private vehicles
- Bus accounted for 5% of all distance travelled within the Wider City Region, which represented around 40% of all distance travelled by bus
- Cycle accounted for 1% of all distance travelled within the Wider City Region, which represented around 40% of all distance travelled by cycle.

3.6.3 Regional Centre

On average, GM residents made nearly 600,000 Regional Centre trips a day, around 9% of all trips. Regional Centre trips accounted for:

- 42% of Regional Centre trips made by GM residents were in private vehicles, but its smaller total market size meant that this was only 7% of all private vehicle trips
- Around a fifth of Regional Centre trips made by GM residents were walking, which represented 7% of all walking trips
- 12% of Regional Centre trips made by GM residents were by bus, which represented 26% of all bus trips
- 11% of Regional Centre trips were by train / tram, which represented nearly half of all train / tram trips.

Regional Centre trips accounted for 9% of the total distance travelled by GM residents. Regional Centre trips accounted for:

- 40% of all the distance travelled by cycle
- 15% of all the distance travelled by train / tram.

3.6.4 City-to-City

On average, GM residents made nearly 200,000 City-to-City trips a day, around 3% of all trips. City-to-City trips accounted for:

- Over 80% of City-to-City trips were made by private vehicle (noting that City-to-City trips are not limited to trips between city centres), but again the smaller market size meant that this was only 5% of all private vehicle trips
- 17% of City-to-City trips were by train / tram, which represented 23% of all the train / tram trips.

City-to-City People and Place category trips accounted for 40% of the total distance travelled by GM residents. Put another way, this meant that two-fifths of the distance travelled by GM residents was by trips with at least one end beyond 10km of Greater Manchester. City-to-City trips accounted for:

- Nearly 40% of all the distance travelled in private vehicles
- Over three-quarters of all the distance travelled by train / tram.

3.6.5 Town Centres

On average, GM residents made over 540,000 Town Centres trips a day, around 9% of all trips by GM residents. Town Centres trips accounted for:

- 71% of Town Centres trips made by GM residents were in private vehicles, but its smaller total market size meant that this was only 11% of all private vehicle trips
- 17% of Town Centres trips made by GM residents were walking, which represented 5% of all walking trips
- 9% of Town Centres trips made by GM residents were by bus, which represented 18% of all bus trips.

Town Centres trips accounted for 6% of the total distance travelled by GM residents. Town Centres trips accounted for:

- 15% of all the distance travelled by bus.

Distance[4] profile by method of travelFigure 12 shows the percentage of trips that fell within different distance bands for each method of travel. For example, it shows that 79% of walking trips were 1km or less, while 82% of train trips were 10km plus.

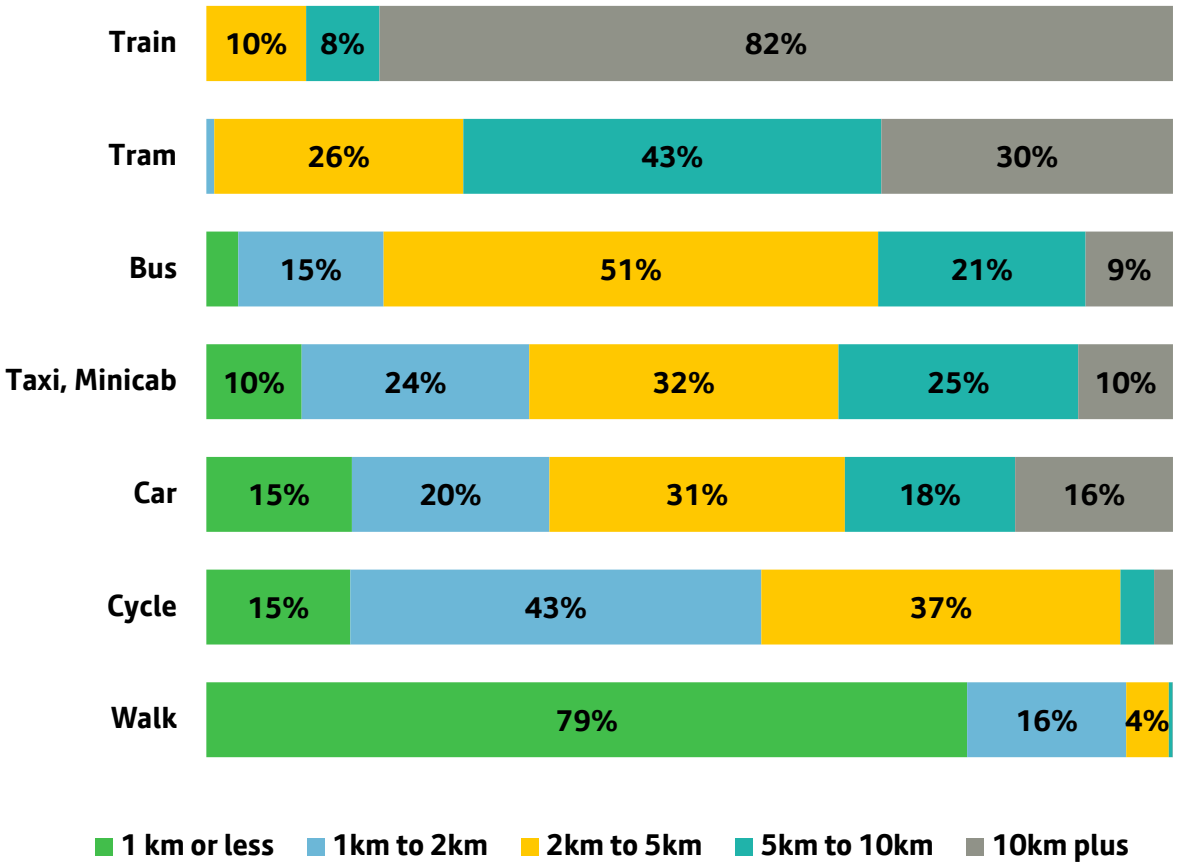
Walking was most common for trips of 1km or less, while bus, taxi, car, and cycle were all attractive for trips of 1km to 5km.

Although car was the most significant method of travel for medium and longer distance trips, tram was mostly used as an alternative for trips that were 5km to 10km, and trains were mostly used as an alternative for trips that were 10km or more.

In 2024, the 15% of car trips that were 1km or less equated to about 185 million annual car journeys by GM residents. These could have been walked in around 15 minutes or cycled in around 4 minutes.

[4] The trip distance reported for TRADS in this document is simply the straight-line distance between the origin and destination of a trip.

Figure 12: Trip length[5] distribution profile by method of travel - GM residents



Source: GM TRADS 2024
Note: car = car or van (driver) or car or van (passenger)

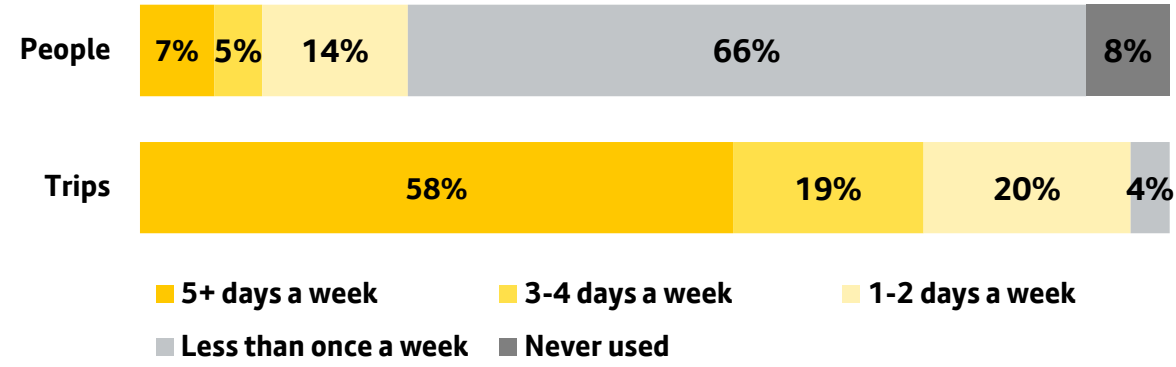
3.7 Frequency of public transport use

A small proportion of frequent users generated most trips across all types of public transport. For example, over 75% of bus trips were made by just 12% of GM residents (those who used the bus at least three or four days a week). However, while they generated far fewer trips, most GM residents did use public transport infrequently. For example, 78% of GM residents used tram less than once a week.

The 'people' bar in Figure 13 shows the percentage of GM residents who used the bus, by their frequency of use. For example, it shows that 7% of GM residents used the bus five or more days a week. The 'trips' bar shows the percentage of bus trips made by GM residents, by how frequently the person making the trip used the bus. For example, 58% of bus trips by GM residents were made by people who used the bus five or more days a week.

[5] The trip distance reported for TRADS in this document is simply the straight-line distance between the origin and destination of a trip.

Figure 13: Frequency of bus use by people, and trips by frequency of use - GM residents

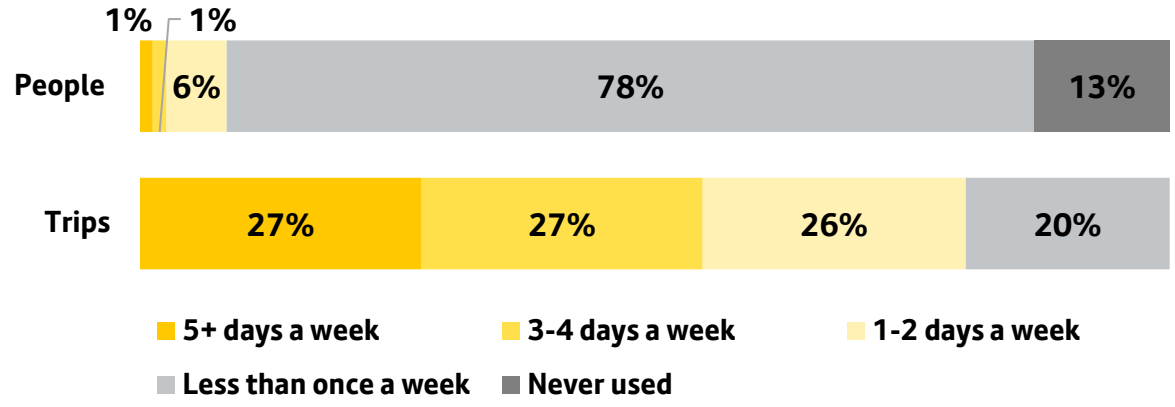


Source: GM TRADS 2024

Note: Less than once a week = at least once a fortnight/at least once a month/at least once a year/not used in the last 12 months

The 'people' bar in Figure 14 shows that only 1% of GM residents used the tram five or more days a week, while the 'trips' bar shows that 27% of tram trips by GM residents were made by people who used the tram five or more days a week.

Figure 14: Frequency of tram use by people, and trips by frequency of use - GM residents

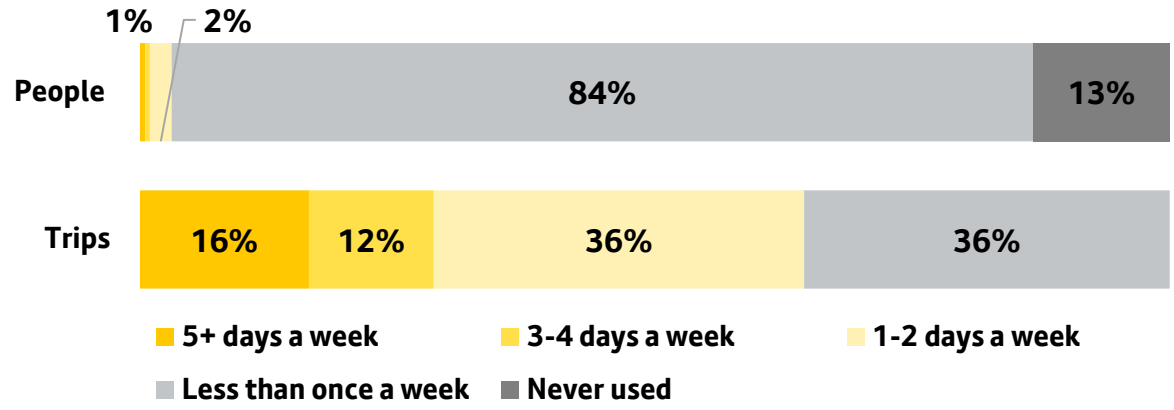


Source: GM TRADS 2024

Note: Less than once a week = at least once a fortnight/at least once a month/at least once a year/not used in the last 12 months

The 'people' bar in Figure 15 shows that only 1% of GM residents used the train five or more days a week, while the 'trips' bar shows that 16% of train trips by GM residents were made by people who used the train five or more days a week.

Figure 15: Frequency of train use by people, and trips by frequency of use - GM residents



Source: GM TRADS 2024

Note: Less than once a week = at least once a fortnight/at least once a month/at least once a year/not used in the last 12 months

3.8 Acorn Category profile of trips by method of travel

The top bar of Figure 16 shows the Acorn Category (descriptions of each category are provided in the Glossary) profile of the Greater Manchester population. The subsequent bars show the Acorn Category profile of trips by different methods of travel. For example, the top bar shows that 22% of the GM population were classed as Low Income Living, but only 18% of train trips by GM residents were made by people classed as Low Income Living.

People in the Low Income Living category were also under-represented on tram (9%), and by car (16%). However, they were over-represented on bus (36%), and by walking (25%).

23% of the GM population were classed as Stretched Society. People in the Stretched Society category were under-represented by car (18%). However, they were over-represented across all other modes.

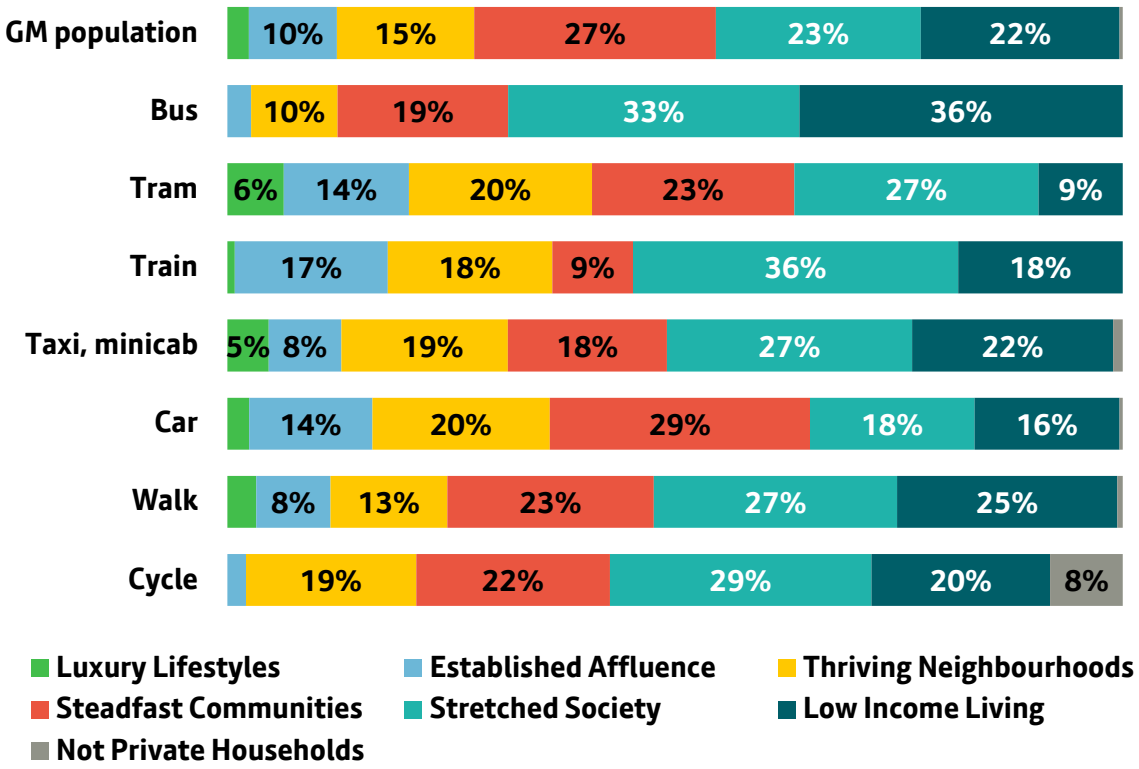
27% of the GM population were classed as Steadfast Communities. People in the Steadfast Communities category under-represented on train (9%), bus (19%), and tram (23%). However, they were over-represented in trips made by car (29%).

15% of the GM population were classed as Thriving Neighbourhoods. People in the Thriving Neighbourhoods category were under-represented on bus (10%), but over-represented on tram (20%), and by car (20%).

10% of the GM population were classed as Established Affluence. People in the Established Affluence category were under-represented by cycle (2%), but over-represented on train (17%), tram (14%), and by car (14%) trips.

2% of the GM population were classed as Luxury Lifestyles. People in the Luxury Lifestyles category were under-represented on bus (0%) and by cycle (0%), and over-represented on taxi, minicab (5%) and tram (6%).

Figure 16: Acorn Category profile of trips by method of travel - GM residents



Source: GM TRADS 2024 and Acorn 2024
Note: car = car or van (driver) or car or van (passenger)

4. Why did GM residents travel?

4.1 Key facts summary - Why did GM residents travel?

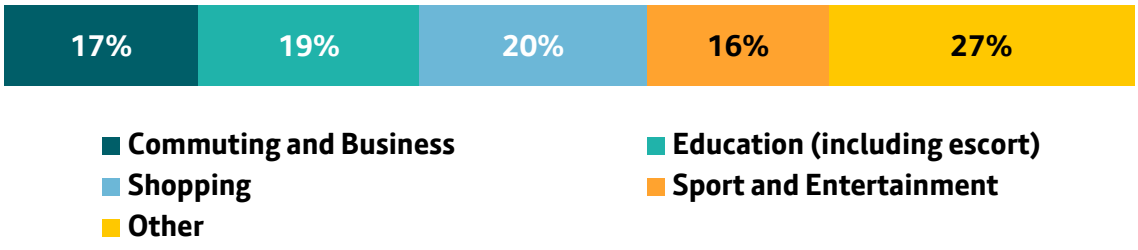
On a typical day in 2024...

- Shopping (20%), education (including escort) (19%), and commuting and business (17%) were the three most common trip purposes.
- Collectively, commuting and business and 'other' (eg visiting friends, personal business) accounted for two thirds of the total distance travelled by GM residents.
- A third of all person km travelled were accounted for by the commuting and business category, but the total distance travelled for this purpose in 2024 was still down by over 20% compared to 2016-18 levels.
- Neighbourhood trips accounted for nearly 60% of all education (including escort) trips made by GM residents.
- Wider City Region trips accounted for nearly half of all commuting and business trips made by GM residents.

4.2 Journey purpose of trips

Shopping (20%) and education (including escort) (19%) were the most common trip purposes. The largest trip category was 'other' (27%), which includes visiting friends and personal business.

Figure 17: Journey purpose of trips - GM residents



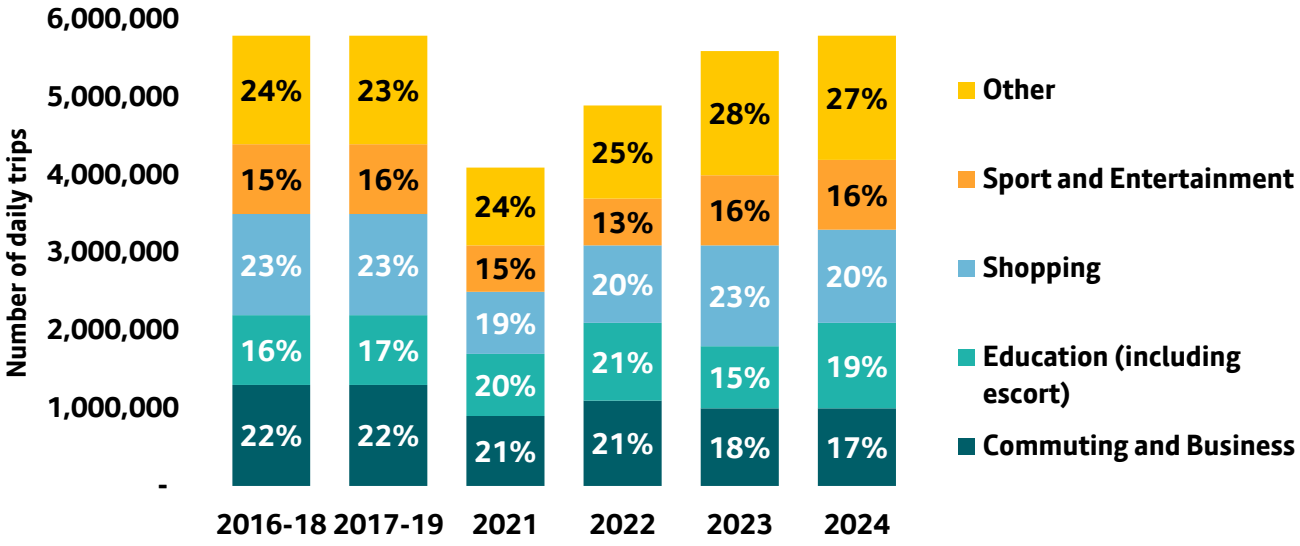
Source: GM TRADS 2024
Note: Other = visiting friends, personal business, escort other, and holiday and round trip

Figure 18 shows the total number of daily trips by journey purpose by year. The length of the bar equates to the number of daily trips and the figures in each bar show the percentage of trips by different trip purposes. For example, in 2024, it shows that there were 5.9 million daily trips and that 17% of these were for commuting and business.

In 2024, the percentage share of commuting and business trips dropped to 17%, with the number of daily trips about 300,000 fewer than in 2017-19.

At 20% in 2024, shopping's share of the total number of trips made by GM residents is down on the pre-pandemic value of 23%.

Figure 18: Daily trip count and journey purpose - GM residents



Source: GM TRADS (2016-18, 2017-19, 2021, 2022, 2023, 2024)
Note: Other = visiting friends, personal business, escort other, and holiday and round trip

4.3 Distance travelled by journey purpose (person km)

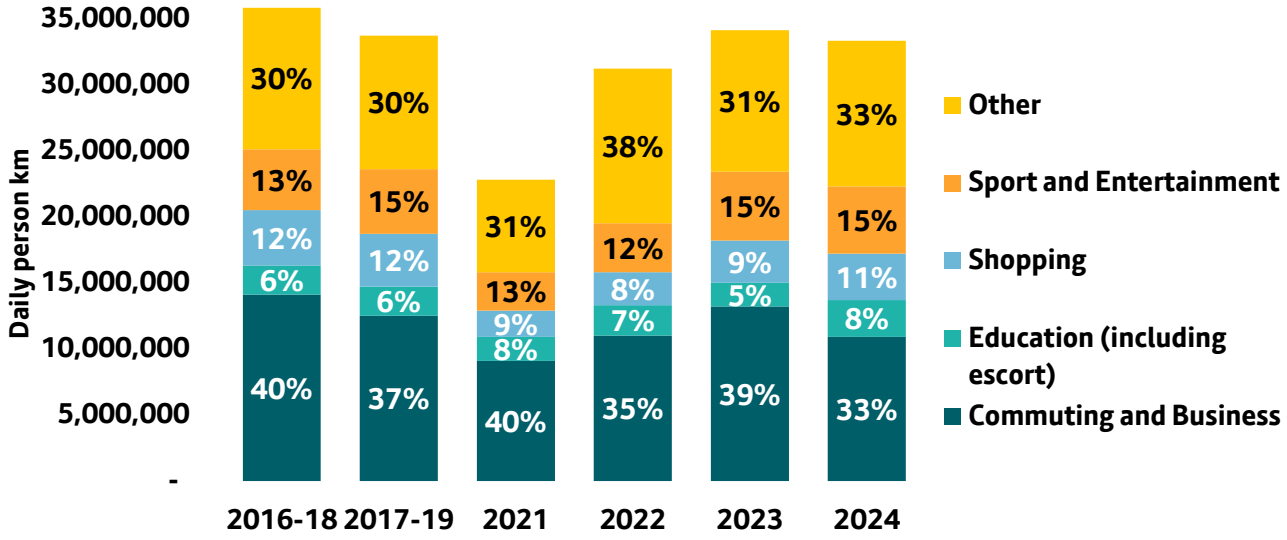
In 2024, GM residents travelled a total of 12.1 billon km, which was broadly similar to 2017-19 (the last survey period prior to the pandemic). The total distance travelled by GM residents (person km) was decreasing prior to the onset of the pandemic, with the key reason being a reduction in business trip kilometres.

Figure 19 shows the total daily distance travelled by GM residents by journey purpose and year. The length of the bar equates to the daily distance travelled by GM residents, while the figures in each bar represent the percentage of the distance travelled for each journey purpose. For example, in 2024, it shows that GM residents travelled over 33 million kilometres each day, of which 33% were for commuting and business.

Although a third of all person km in 2024 were accounted for by commuting and business, the total distance travelled for this combined purpose was down by over 20% compared to 2016-18 levels.

A further third of the distance travelled in 2024 was accounted for by the 'other' (eg visiting friends, personal business) category, with the total distance travelled broadly in line with 2016-18 levels. The remaining distance travelled comprised of sport and entertainment trips (15%), shopping trips (11%), and education (including escort) trips (8%).

Figure 19: Daily person km and journey purpose - GM residents



Source: GM TRADS (2016-18, 2017-19, 2021, 2022, 2023, 2024)
Note: Other = visiting friends, personal business, escort other, and holiday and round trip

4.4 Comparison of journey purpose share and trip distance

Figure 20 shows the number of daily trips (in millions) and the daily distanced travelled (in million km) for each trip purpose, as well as each purpose's percentage of total trips, and percentage of distance travelled. This shows that trips such as commuting and business and 'other' tended to be longer, as their percentage share of trips was lower than their percentage share of the distance travelled. For example, commuting and business accounted for 17% of trips, but 33% of the distance travelled. Trips such as education (including escort), and shopping tended to be shorter trips, as their percentage share of trips was greater than their percentage share of the distance travelled. For example, shopping trips accounted for 20% of trips, but only 11% of the distance travelled.

Figure 20: Purpose of travel – trips and distance[6] travelled by GM residents, 2024

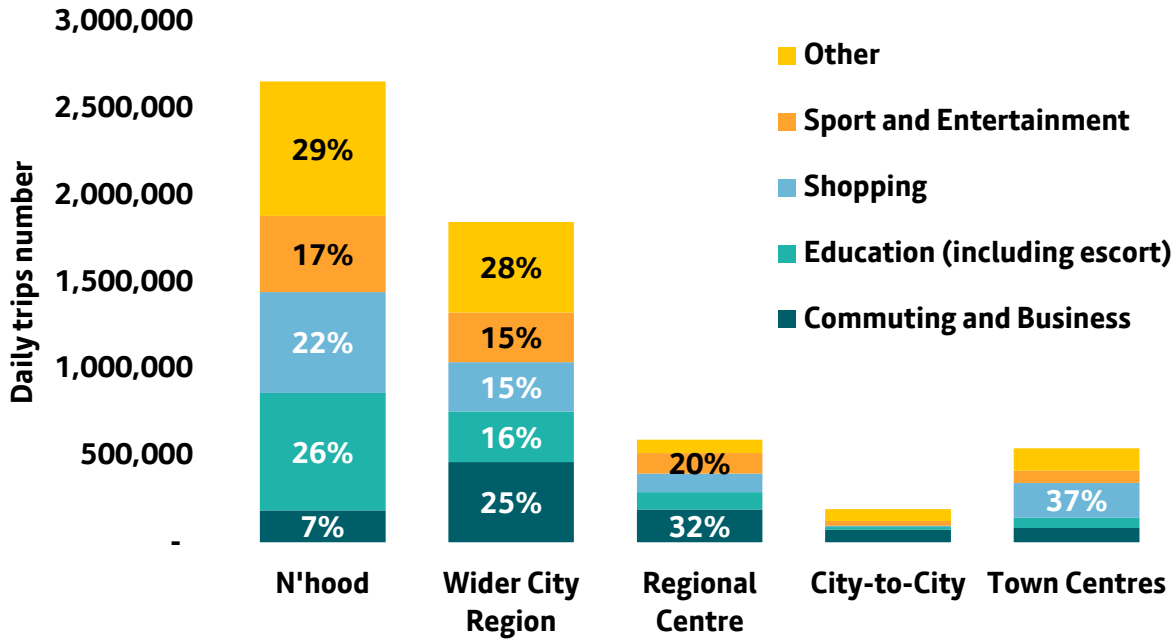
Trip purpose	Number of daily trips (millions)	% of total trips	Average (mean) trip distance in km	Daily distance travelled (million km)	% of distance travelled
Commuting and business	1.0	17%	10.8	10.9	33%
Education (inc. escort)	1.1	19%	2.4	2.8	8%
Shopping	1.2	20%	3.0	3.5	11%
Sport and entertainment	0.9	16%	5.4	5.1	15%
Other	1.6	27%	7.0	11.0	33%

Source: GM TRADS 2024

4.5 People and Place categories and journey purpose analysis

The length of each bar in Figure 21 shows GM residents' number of daily trips by People and Place categories. For example, it shows that GM residents made over 1.8 million daily Wider City Region trips. The figures in each bar show the percentage of daily trips that were made for each journey purpose. For example, it shows that 25% of Wider City Region trips were made for commuting and business.

Figure 21: Daily trip count and journey purpose by People and Place categories - GM residents



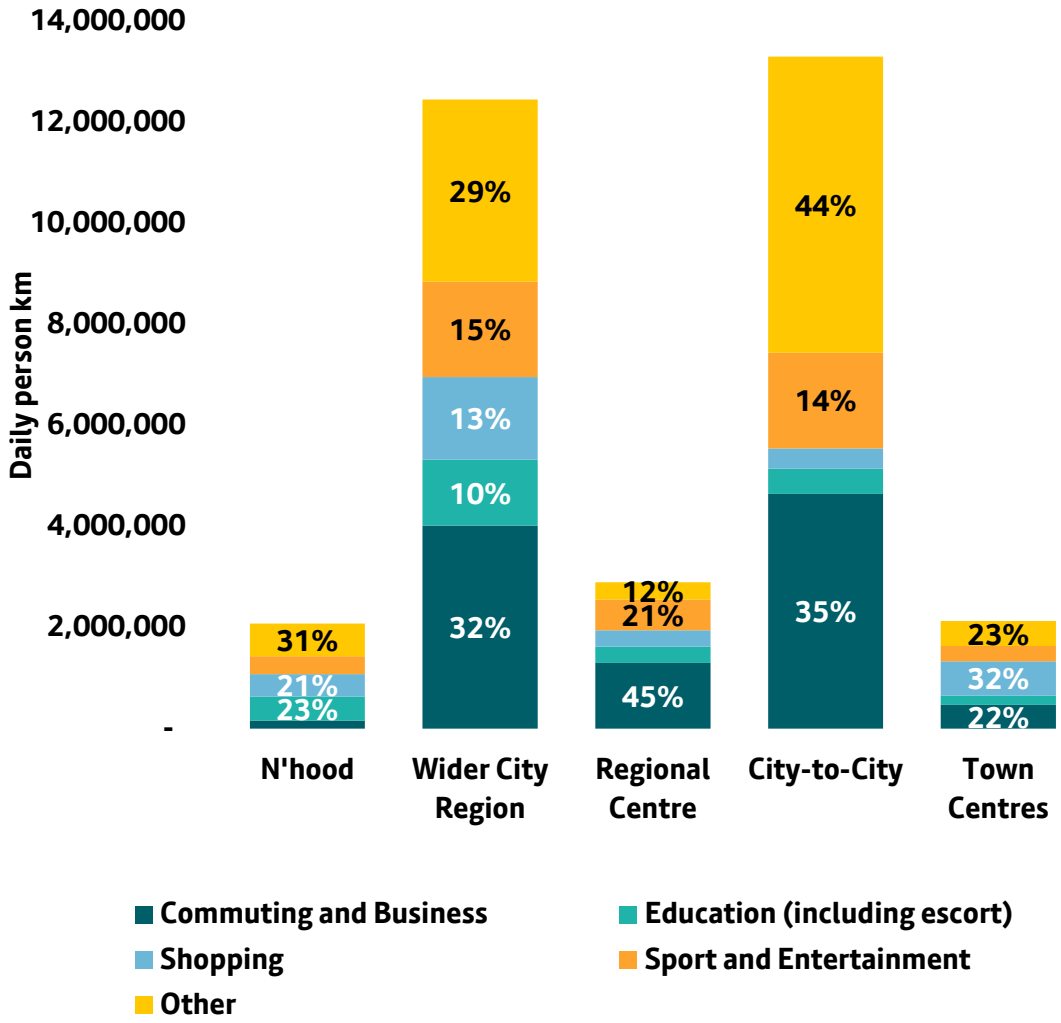
Source: GM TRADS 2024

[6] The trip distance reported for TRADS in this document is simply the straight-line distance between the origin and destination of a trip.

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

The length of each bar in Figure 22 shows the daily distance GM residents travelled in kilometres by People and Place categories. For example, it shows that, for the Wider City Region People and Place category, GM residents travelled about 12.5 million kilometres each day. The figures in each bar show the percentage of the distance travelled for each journey purpose. For example, it shows that, for the Wider City Region People and Place category, 32% of the distance travelled was for commuting and business.

Figure 22: Daily person km and journey purpose by People and Place categories – GM residents



Source: GM TRADS 2024
Note: Other = visiting friends, personal business, escort other, and holiday and round trip

4.5.1 Neighbourhood

On average, GM residents made about 2.7 million Neighbourhood trips a day, around 46% of all trips. Neighbourhood trips accounted for:

- Around 60% of all education trips
- About half of all shopping trips
- Nearly half of all 'other' trips (eg visiting friends, personal business)
- A relatively small proportion of commuting and business trips (19%).

Neighbourhood trips are less than 2km in length. Consequently these 46% of trips only account for 6% of the total distance travelled by GM residents.

4.5.2 Wider City Region

On average, GM residents made over 1.8 million Wider City Region trips a day, around a third of all trips. Wider City Region trips accounted for:

- Nearly half of all commuting and business trips
- Around a third of all sport and entertainment trips.

Wider City Region trips accounted for 38% of the total distance travelled. Wider City Region trips accounted for:

- 38% of the distance travelled for commuting and business
- 37% of the total distance travelled for sport and entertainment (despite representing only 15% of the distance travelled in the Wider City Region People and Place category)
- Nearly half of the total distance travelled for education (including escort (despite representing only 10% of the distance travelled in the Wider City Region People and Place category)).

4.5.3 Regional Centre

On average, GM residents made nearly 600,000 Regional Centre trips a day, 10% of all trips. Key findings for Regional Centre trips were:

- About a third of Regional Centre trips were for commuting and business purposes, but its smaller total market size meant that this was only around a fifth of all commuting and business trips
- About one-in-six Regional Centre trips were for education (including escort), which reflects the number of higher education establishments in the Regional Centre.

Regional Centre trips accounted for 9% of the total distance travelled by GM residents.

4.5.4 City-to-City

On average, GM residents made nearly 200,000 City-to-City trips a day, around 3% of all trips. Key findings for City-to-City trips were:

- Nearly 40% of City-to-City trips were for commuting and business, but again the smaller market size meant that this was only 7% of all commuting and business trips
- Other trips (eg visiting friends, personal business) also made up about a third of City-to-City trips.

City-to-City People and Place category trips accounted for about 40% of the total distance travelled by GM residents. City-to-City trips accounted for:

- 44% of the total distance travelled for commuting and business, which was 35% the distance travelled in the City-to-City People and Place category
- 38% of the total distance travelled for sport or entertainment, which was 14% of the distance travelled in the City-to-City People and Place category.

13% of the distance travelled by GM residents in the City-to-City People and Place category was for the purpose of visiting friends (in Figure 22 these trips are included in the other category).

4.5.5 Town Centres

On average, GM residents made nearly 550,000 Town Centres trips a day, around 10% of all trips. Key findings for Town Centres trips were:

- Nearly 40% of Town Centres trips were for shopping (17% of all shopping trips), and a fifth of all Town Centres trips were for commuting and business (11% of all commuting and business trips).

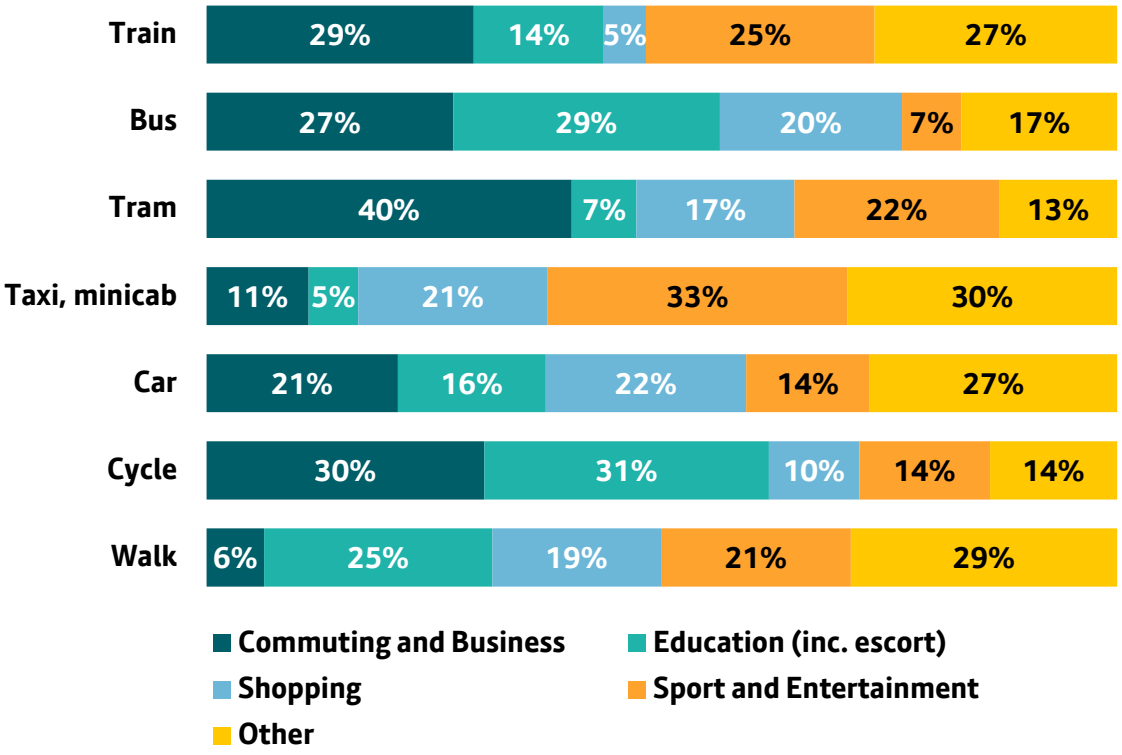
Town Centres trips accounted for 7% of the total distance travelled by GM residents.

4.6 Journey purpose by method of travel

Figure 23 shows the percentage of trips by journey purpose for each method of travel. For example, it shows that 29% of train trips were for commuting and business, while 27% of bus trips were for commuting and business.

Commuting and business was the most common journey purpose for train and tram (29% and 40% respectively), while education (including escort) was the most common purpose for bus and cycle trips (29% and 31% respectively). Sport and entertainment was the most common purpose for taxi, mini cab trips (33%) and 'other' which includes visiting friends, and personal business, was the most common journey purpose for car and walking trips (27% and 29% respectively).

Figure 23: Journey purpose by method of travel - GM residents



Source: GM TRADS 2024

Notes: Other = visiting friends, personal business, escort other, and holiday and round trip
Car = car or van (driver) or car or van (passenger)

5. When did GM residents travel?

5.1 Key facts summary - When did GM residents travel?

On a typical day in 2024…

- GM residents started nearly nine-in-ten of their trips (86%) in the 12 hours between 7am and 7pm, while 8% of their trips started between 7pm and 10pm. Only 10% of trips started between 8pm and 7am, of which 64% were by private vehicle (compared to 59% outside these hours).
- The peak periods for trip making were 8am-9am and 3pm-4pm, accounting for nearly a quarter of all trips by GM residents. During these hours, over half of trips were for education (including escort).
- Around three-in-ten trips by GM residents during the periods 7am-9am and 4pm-6pm were to/from work/business. 50% of all GM resident commuting and business trips were made outside these periods.

5.2 Transport mix of trips by time of day

The length of each bar in Figure 24 shows the number of daily trips by GM residents by the trip's starting hour and by the type of travel used. For example, about 670,000 daily trips started between 8am and 9am[7], with around 390,000 of these being made by private vehicle.

The hourly profile of trip start times on an average day in 2024 (Figure 24) shows two extreme peaks at 8am-9am and 3pm-4pm. Together these hours accounted for nearly a quarter of all trips by GM residents. GM residents started 86% of their trips in the 12 hours between 7am and 7pm, while 8% of their trips started between 7pm and 10pm. **Only 10% of trips started between 8pm and 7am, of which 64% were by private vehicle (compared to 59% outside these hours).**

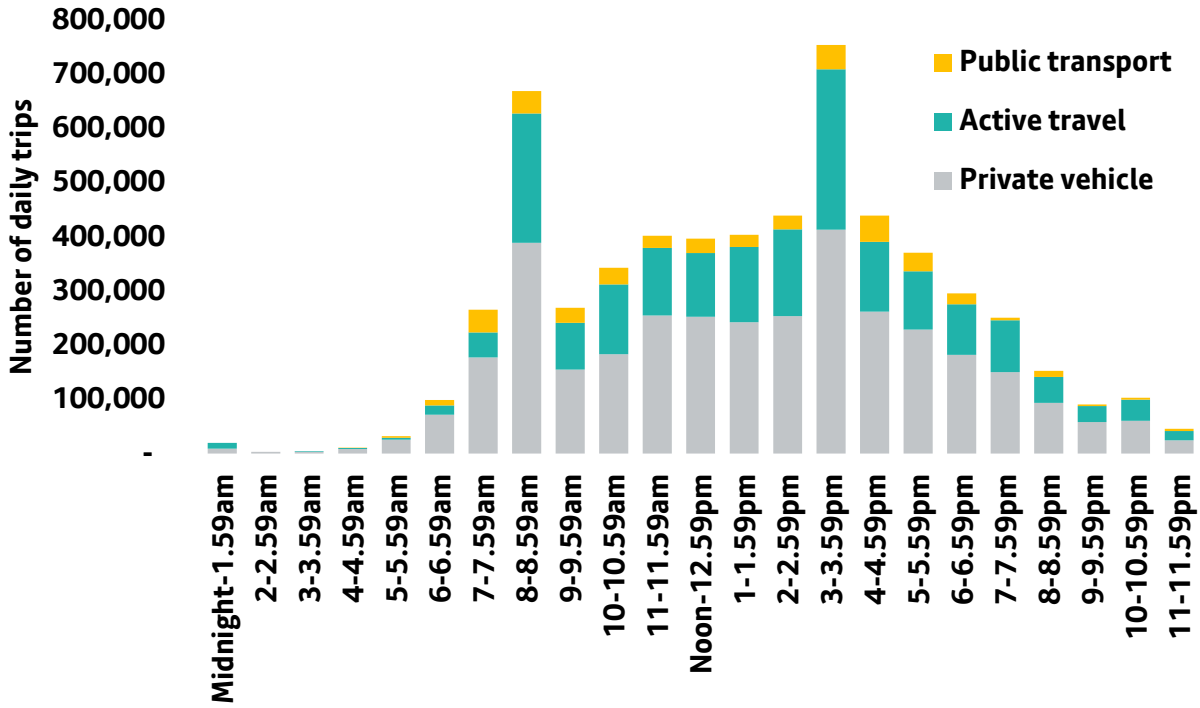
The two peak hours (8am and 3pm) were particularly important for active travel trips, with 28% of active travel trips occurring during these hours on an average day.

21% of private vehicle trips occurred in the three hours between 7am and 10am, which was just below the three hours between 3pm and 6pm when 26% of private vehicle trips occurred.

[7] For ease of reading, we refer to hour periods in the main body of this report differently to how they are presented in Figures. For example, 8am-9am in the main body would be shown as 8-8.59am on any relevant Figures.

Public transport trips were particularly concentrated, with 42% occurring over four hours (7am-9am and 3pm-5pm).

Figure 24: Transport mix of trips by journey start hour - GM residents

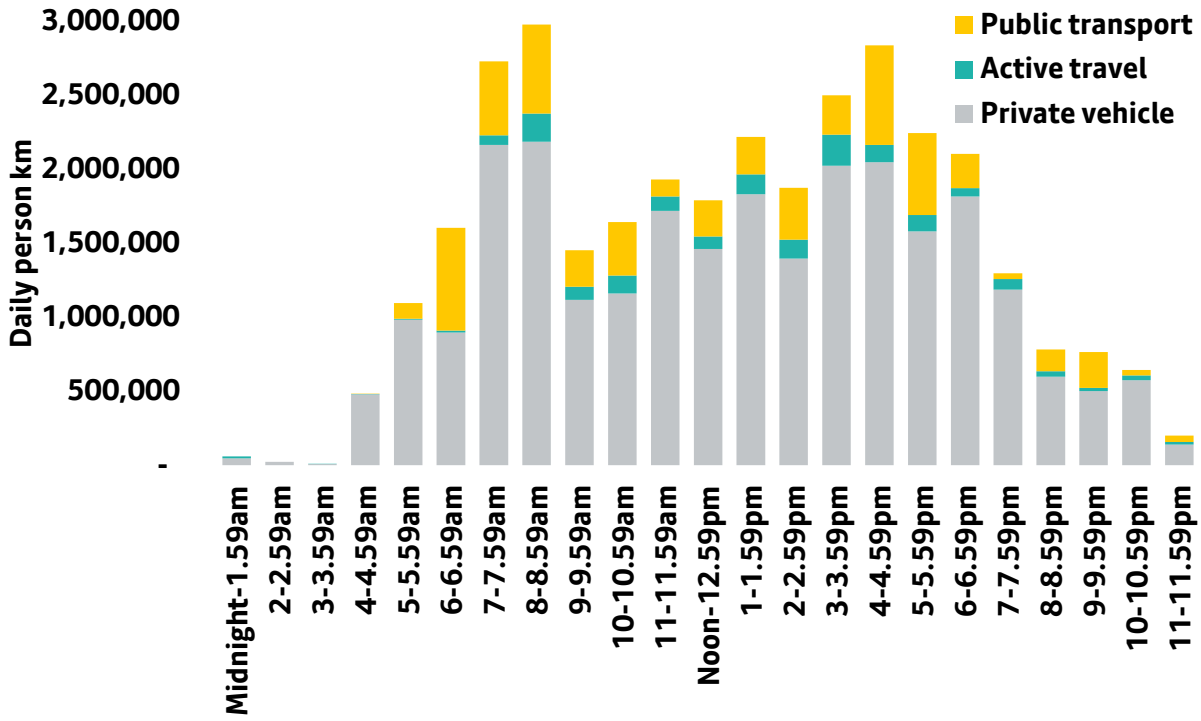


Source: GM TRADS 2024
Note: private vehicle = car or van (driver), car or van (passenger), taxi, minicab, motorcycle, scooter, moped, or any other

5.3 Transport mix of person km by time of day

The length of each bar in Figure 25 shows the daily distance (in kilometres) travelled by GM residents by the trip's starting hour and by the type of travel used. For example, there were about 5.7 million daily kilometres travelled by trips that started between 7am and 9am and about 4.3 million of these being made by private vehicle.

Figure 25: Transport mix of person km by journey start hour - GM residents



Source: GM TRADS 2024

Note: private vehicle = car or van (driver), car or van (passenger), taxi, minicab, motorcycle, scooter, moped, or any other

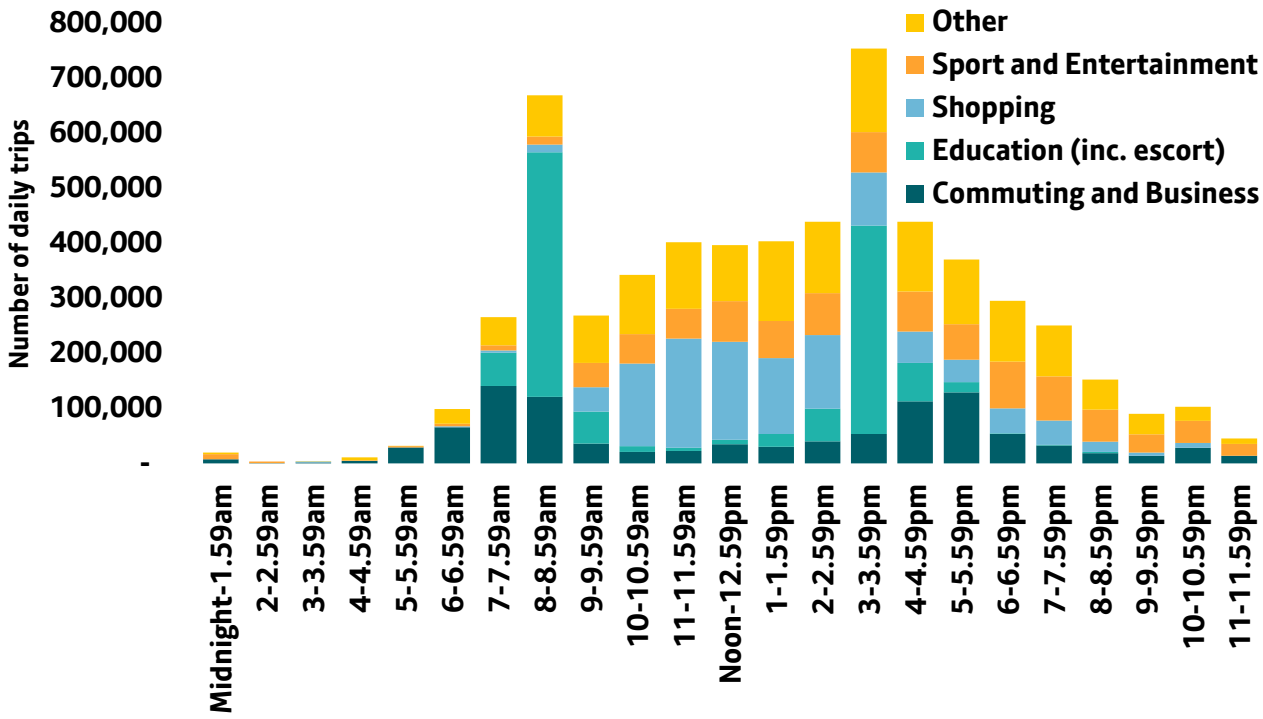
The hourly distribution of the distance travelled by GM residents during the day (Figure 25) differed slightly from the hourly profile of trip start times (Figure 24). For example, while only 7% of trips started between 5am and 8am, these trips accounted for 16% of the total distance travelled by GM residents on an average day. Similarly, 14% of trips started between 4pm and 6pm, which accounted for 15% of total distance travelled by GM residents. In the case of public transport, the two hours from 7am-9am accounted for 19% of the distance travelled by people on public transport.

Public transport's percentage share of the distance travelled by GM residents was greater during the peaks. For example, of the total distance travelled by trips that started between 7am and 8am, public transport accounted for 18%, compared to 6% for trips that started between 11am and noon. This highlights the important role public transport played in providing network capacity during these busy periods.

5.4 Journey purpose of trip by time of day

The length of each bar in Figure 26 shows the number of daily trips by GM residents by the trip's starting hour and by the purpose of the trip. For example, there were over 750,000 daily trips that started between 3pm and 4pm, with around 380,000 of these being for education (including escort).

Figure 26: Journey purpose of trip by journey start hour - GM residents



Source: GM TRADS 2024

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

As may be expected, **the two peak periods for trips (8am-9am and 3pm-4pm) were dominated by education (including escort) travel, accounting for 58% of all the trips that started in these two single hours.** Around seven-in-ten education (including escort) trips started in these two periods.

Shopping was a particularly important journey purpose during the day, in the period between the two peak hours, with about two-thirds of shopping trips starting between 10am and 3pm.

Around three-in-ten trips by GM residents during the periods 7am-9am and 4pm-6pm were to/from work/business. 50% of all GM resident commuting and business trips were made outside these periods.

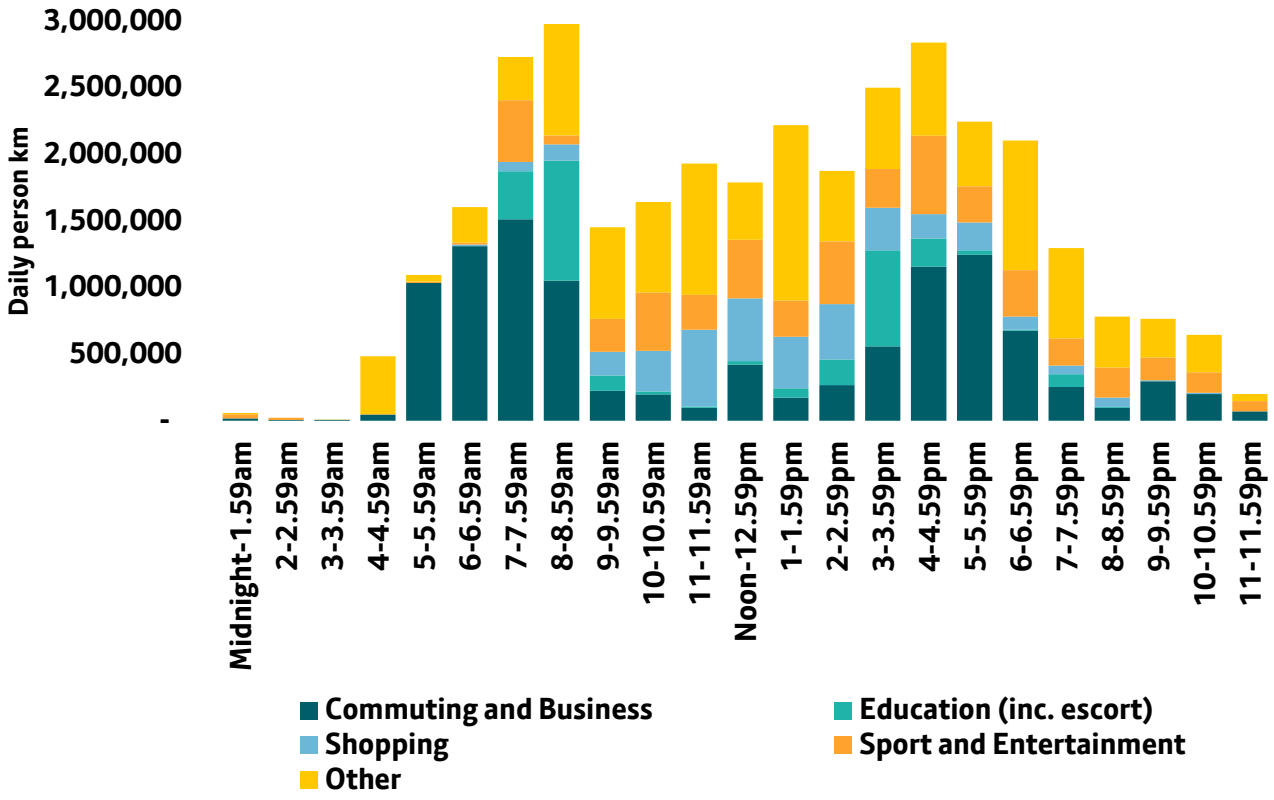
Between 8pm and 7am, trips for both commuting and business, and sport and entertainment were more prevalent than in the period 7am to 8pm. Between 8pm and 7am, 33% of trips were for commuting and business, compared to 16% between 7am and 8pm. Between 8pm and 7am, 31% of trips were for sport and entertainment, compared to 15% between 7am and 8pm.

5.5 Journey purpose of person km by time of day

The length of each bar in Figure 27 shows the daily distance (in kilometres) travelled by GM residents by the trip's starting hour and by the purpose of the trip. For example, there were

2.5 million daily kilometres travelled in trips that started between 3pm and 4pm, with just over 720,000 kilometres of these being for education (including escort).

Figure 27: Journey purpose of person km by journey start hour - GM residents



Source: GM TRADS 2024

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

45% of the distance travelled for commuting and business trips was by trips that started within two, two-hour periods of the day (7am-9am and 4pm-6pm).

The category 'other', which includes visiting friends, was widely dispersed across the 24-hour period. It accounted for 42% of the total distance travelled between the peaks (9am to 3pm).

Commuting and business was important in terms of distance covered by GM residents between 8pm and 7am, accounting for 54% of the total distance travelled.

6. Car and van availability in Greater Manchester

6.1 Key facts summary - Car availability in Greater Manchester

- Residents with no cars or vans in their households made 87% of their trips by active travel or public transport. While in households where there were fewer cars than adults, 36% of trips were by active travel or public transport. In households where there was at least one car per adult, only 27% of trips were by active travel or public transport.
- Residents in households with no cars were seven times more likely to use a bus for their journeys than residents in households where there was at least one car per adult.
- Private car keeping on a per head basis had been increasing in GM until 2022. At the end of 2024, there were well over 1.2m licensed cars or vans being kept privately in GM, which equated to roughly one car per two residents aged 17 or over.
- Between 2011 and 2021, the number of licensed privately kept cars in Greater Manchester grew by 13%, exceeding the 7% growth in the GM population.
- Across GM, around half of the least affluent households, as classified by Acorn, had no access to a car/van, while for the most affluent households it can be expected that they will nearly always have a car/van available.

6.2 Car availability and method of travel

The methods of travel that GM residents used for their trips were strongly correlated to the number of cars available per adult in a household. Simply put, as cars became available for adults to use, their active travel and public transport use declined.

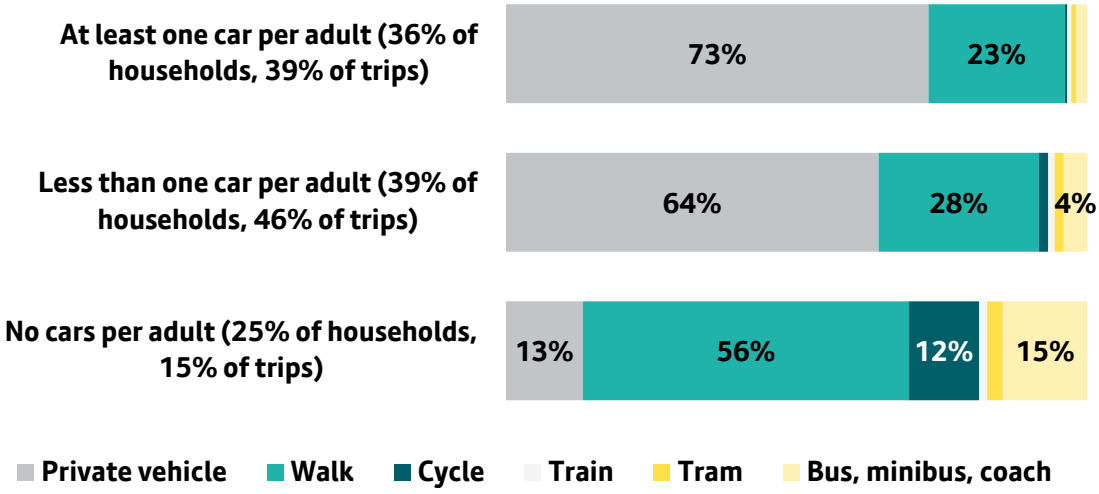
Each bar in Figure 28 represents the trips made by people living in households with different levels of access to cars. For example, the bottom bar represents trips made by people living in households with no car. The figures in each bar represent the percentage of trips by each type of household that were made by different methods of travel. For example, 13% of trips by people living in households with no access to a car were made by a private vehicle. The percentage of total households and the percentage of total trips in each category of car keepership are shown in the vertical axis labels. For example, no car households account for 25% of all households in GM, and 15% of all the trips made by GM residents.

In 2024, residents with no cars in their households made 87% of their trips by active travel or public transport. In households where there were fewer cars than adults, 36% of their

trips were by active travel or public transport. In households where there was at least one car for every adult, only 27% of their trips were by active travel or public transport.

Comparing residents in households with no car to those with at least one car per adult highlights a particularly stark difference in bus use: **residents in households with no car were seven times more likely to use a bus for their journeys**. The same comparison for rail-based travel was less pronounced, but residents in households with no car were still over 2.5 times more likely to make their trips using rail-based types of travel.

Figure 28: Transport mix of trips by car keepership (%) - GM residents



Source: GM TRADS 2024
Note: private vehicle = car or van (driver), car or van (passenger), taxi, minicab, motorcycle, scooter, moped, or any other

6.3 Car availability trends in GM

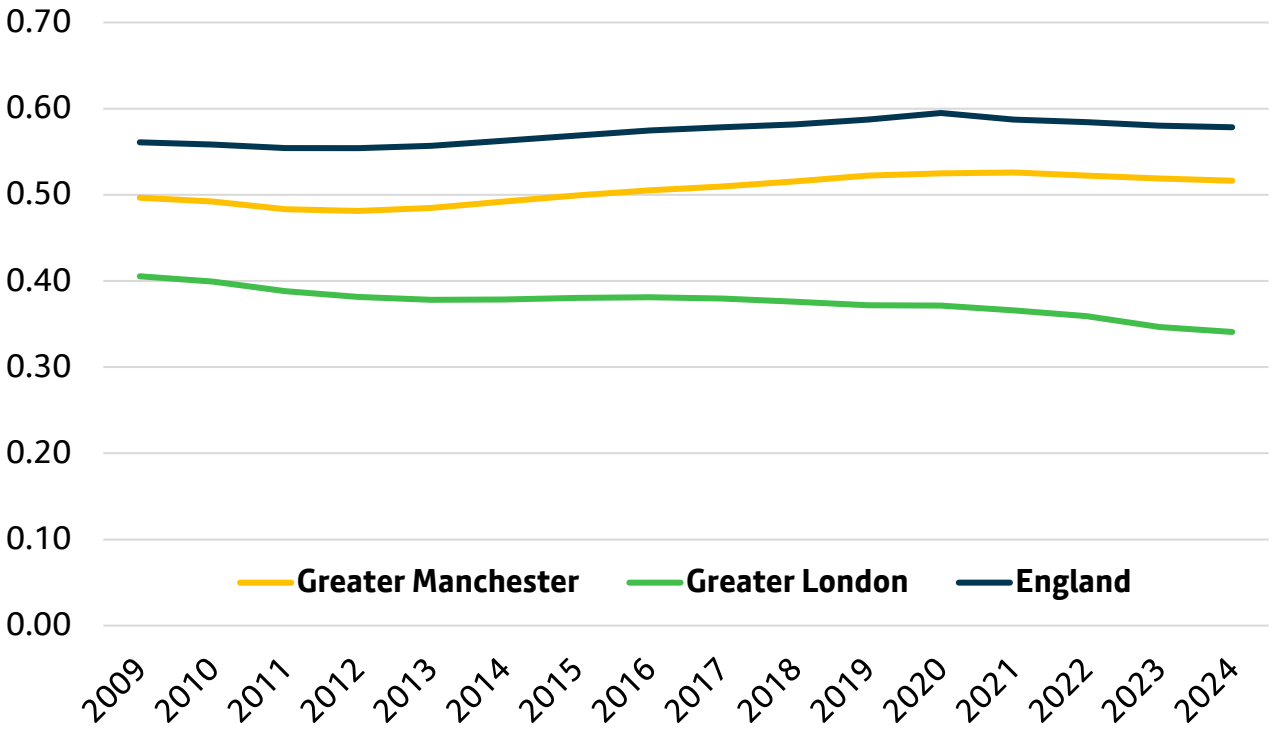
Private car keeping on a per head basis had been increasing until 2022. **Between 2011 and 2021 the number of licensed privately kept cars in Greater Manchester grew by 13%, exceeding the 7% growth in the GM population.** (Sources: DfT Tables VEH0105 and VEH0125, Census 2011, Census 2021).

At the end of 2024, there were over 1.2m licensed cars or LGVs being kept privately in GM, which equated to roughly one car or van per two residents aged 17 or over. For context, Greater London has roughly one car for every three residents aged 17 or over.

Figure 29 shows the historic trend of licensed and privately kept cars and LGVs for GM, Greater London, and England. Figure 29 demonstrates that while GM has lower availability on a per head basis than the average across England as a whole, it has followed a very similar trend since 2009. Since reaching high points in 2020 (England) and 2021 (GM), both have seen car and LGV availability fall slightly on a per head basis.

Figure 29 also shows how Greater London has a very different historic trend to GM and England. In Greater London, car and LGV per head levels have been in long-term decline since 2009, and this trend has shown signs of acceleration since 2020.

Figure 29: Licensed and privately kept cars and LGVs per head of population (17 or over)

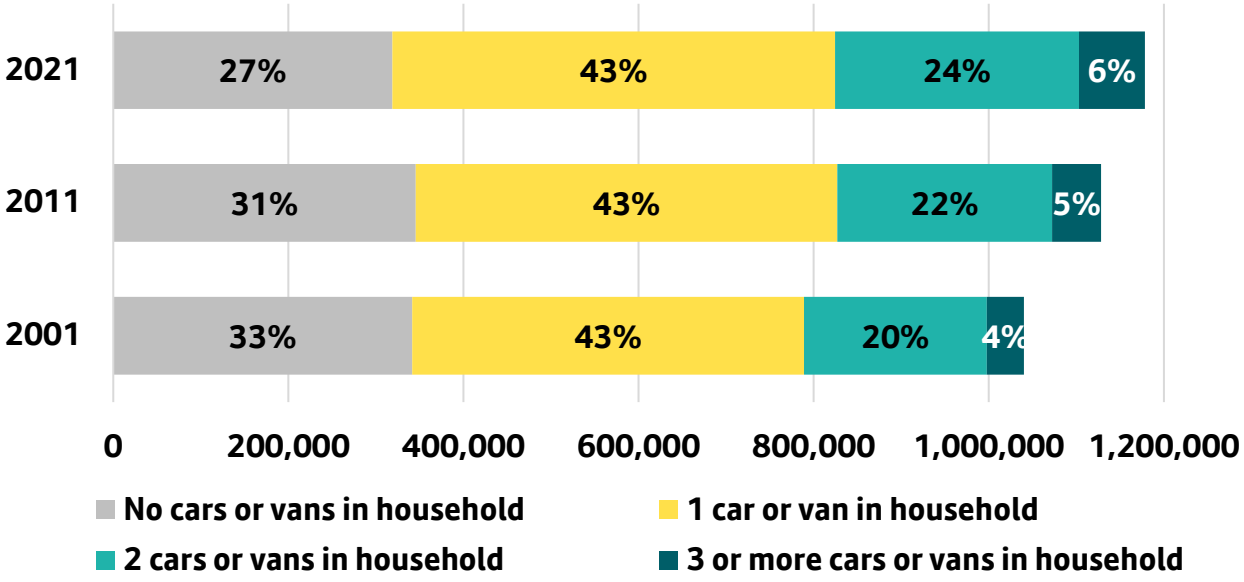


Source: VEH0105 (DfT), Population Estimates – Local Authority based by single year of age (ONS)

The length of each bar in Figure 30 shows the number of households in GM by year, while the figures in each bar represent the percentage of households that have access to different numbers of cars or vans. For example, in 2021, there were just under 1.2 million GM households and 6% of these had three or more cars or vans available to them.

Between 2001 and 2021 both the absolute number and percentage share of GM households with access to a car or a van increased. In 2021, there were 160,000 more households with a car or van than there were in 2001, with 100,000 more of these households having access to two or more cars or vans. In 2001, around 67% of GM households had access to a car or van, but by 2021 this had risen to 73% of households. For context, between 2001 and 2021 Greater London saw a reduction in the proportion of households with access to a car or van, falling from 63% to 58%.

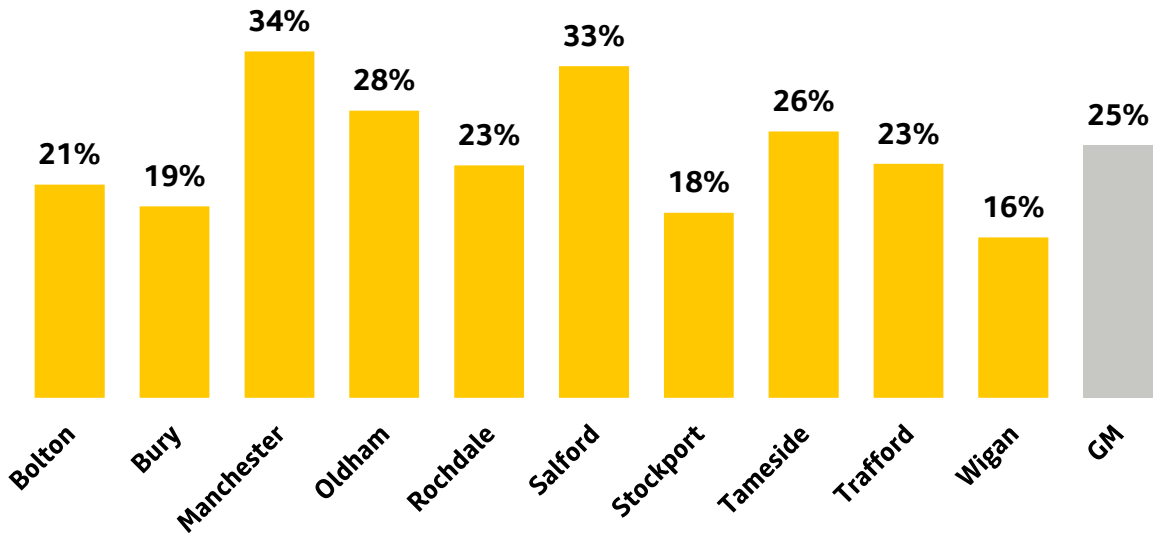
Figure 30: Household car or van availability - GM households



Source: Census 2001, Census 2011, Census 2021

Across GM, 25% of households had no access to a car/van in 2024. The proportion of households without access to a car/van varied significantly by local authority area. Manchester had the highest proportion at 34%, closely followed by Salford (33%), while Wigan had the lowest proportion at 16%. For context, 24% of households across England did not have access to a car. (Source: Census 2021)

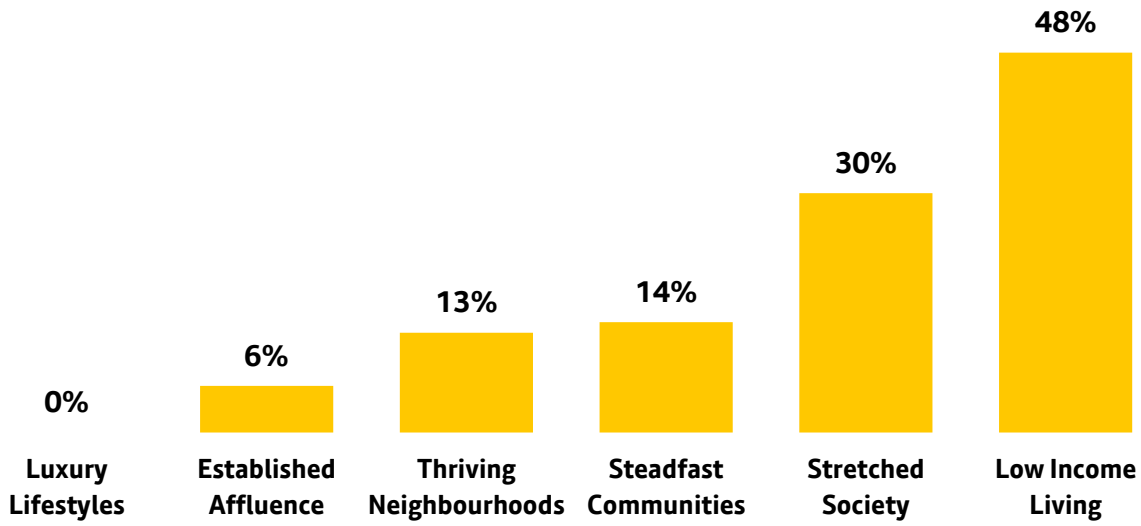
Figure 31: Percentage of GM households without access to a car/van - by local authority area



Source: GM TRADS 2024

Figure 32 shows there was a strong relationship between levels of deprivation and the proportion of households without access to a car/van. **Across GM, around half of the least affluent households, as classified by Acorn, had no access to a car/van, compared to full availability for the most affluent households.**

Figure 32: Percentage of GM households with no access to a car/van - by Acorn Category



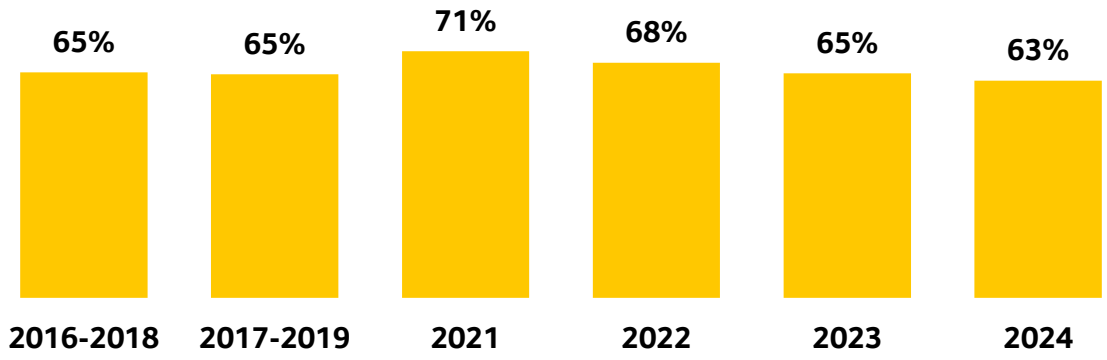
Source: GM TRADS 2024 and Acorn 2024

7. Car/van occupancy

Over the period 2016-18, the average occupancy for a car/van trip was about 1.5 people (65% of car/van trips unaccompanied), only decreasing slightly in 2021 to 1.4 (71% of car/van trips unaccompanied), before commencing a rebound that, as of 2024, stood at broadly 1.5 (65% of car trips unaccompanied). The National Travel Survey (NTS0905) has found similar car occupancy rates at a national-level in recent years.

In 2024, GM residents made 1.4 million daily trips in cars/vans that had an occupancy rate of one. In 2024. Car and van trips made by GM residents with only one occupant accounted for 69% of the total distance travelled by their cars and vans.

Figure 33: Percentage of car/van trips that were unaccompanied - GM residents



Source: GM TRADS (2016-18, 2017-19, 2021, 2022, 2023, 2024)

Car/van occupancy varies greatly depending on the purpose of the trip being made. For example, nearly all commuting and business car/van trips were unaccompanied, while only about half of sport and entertainment trips were unaccompanied.

Figure 34: Percentage of car/van trips that were unaccompanied by journey purpose - GM residents

Source: GM TRADS 2024

8. In focus 1: Electric vehicle trends

In the TRADS 2023 Summary Report, we took an in-depth look at the education travel market (TRADS 2023 Summary Report, page 46). We continue this approach in this report, but have this time instead looked at two distinct topics. The first of these is electric vehicle use by GM residents.

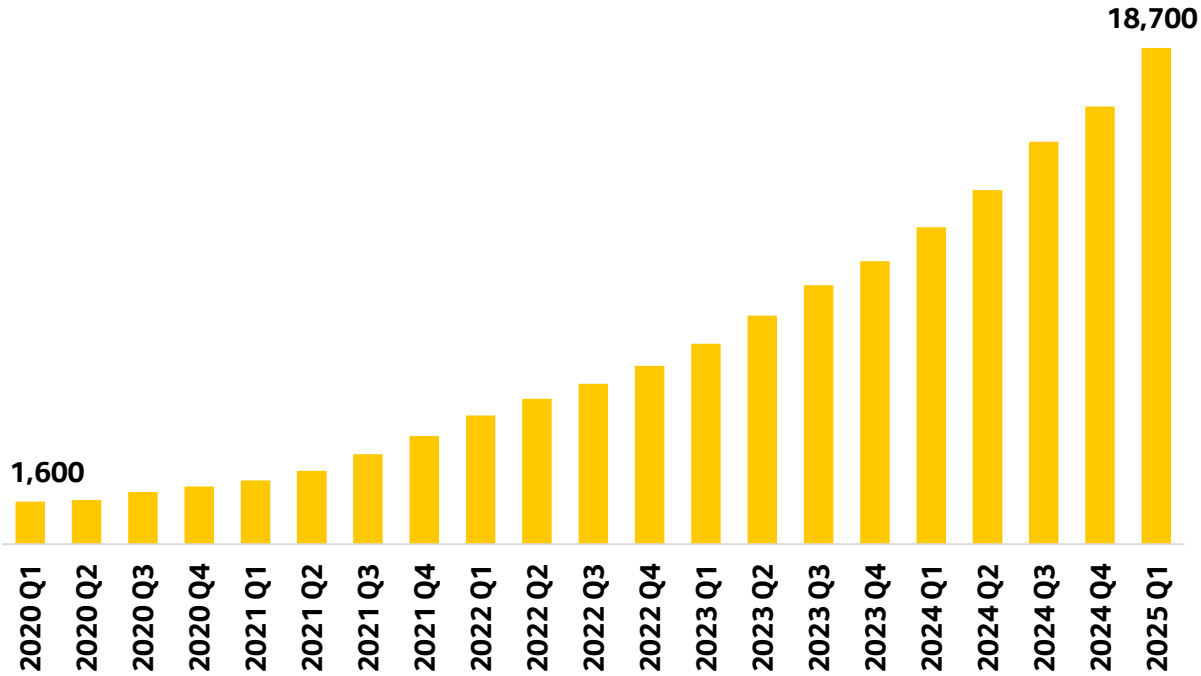
8.1 Key facts summary - electric vehicle use by GM residents

- At the end of the first quarter of 2025 there were 18,700 plug-in cars kept privately by GM residents. If there were to be a continuation of growth in line with the profile of that between 2020 and 2025, the number of such vehicles would be close to 250,000 by 2030.
- In 2024, 5% of all trips by GM residents were made in an electric car/van (including hybrid vehicles), compared to 3% of all trips in 2023. At 5% of the total travel market this was broadly similar to the share of the market held by public transport (bus, tram, and train trips account for 6% of the market).
- The proportion of households with access to a hybrid, electric, or alternative fuel car increases with affluence, with households in the most deprived Low Income Living category being over 10 times less likely to have such a vehicle (3%) than those in the Luxury Lifestyles category (40%).

8.2 Growth of licensed plug-in cars kept privately by GM residents

Figure 35 shows how there has been an over ten-fold increase in the number of licensed plug-in cars kept privately by GM residents in the five-year period between the start of 2020 and 2025. At the end of the first quarter of 2025 there were 18,700 such vehicles. If there were to be a continuation of growth in line with the profile of that between 2020 and 2025, the number of such vehicles would be close to 250,000 by 2030.

Figure 35: Licensed plug-in cars kept privately by GM residents



Source: VEH0142 (DfT)

In 2024, TRADS estimated that 8% of GM households had access to a hybrid, electric vehicle, or alternative fuel car.[8] A little over half of these households had access to both a hybrid, electric vehicle, or alternative fuel car, and an internal combustion engine car.

8.3 Use of electric (including hybrid) vehicles by GM residents

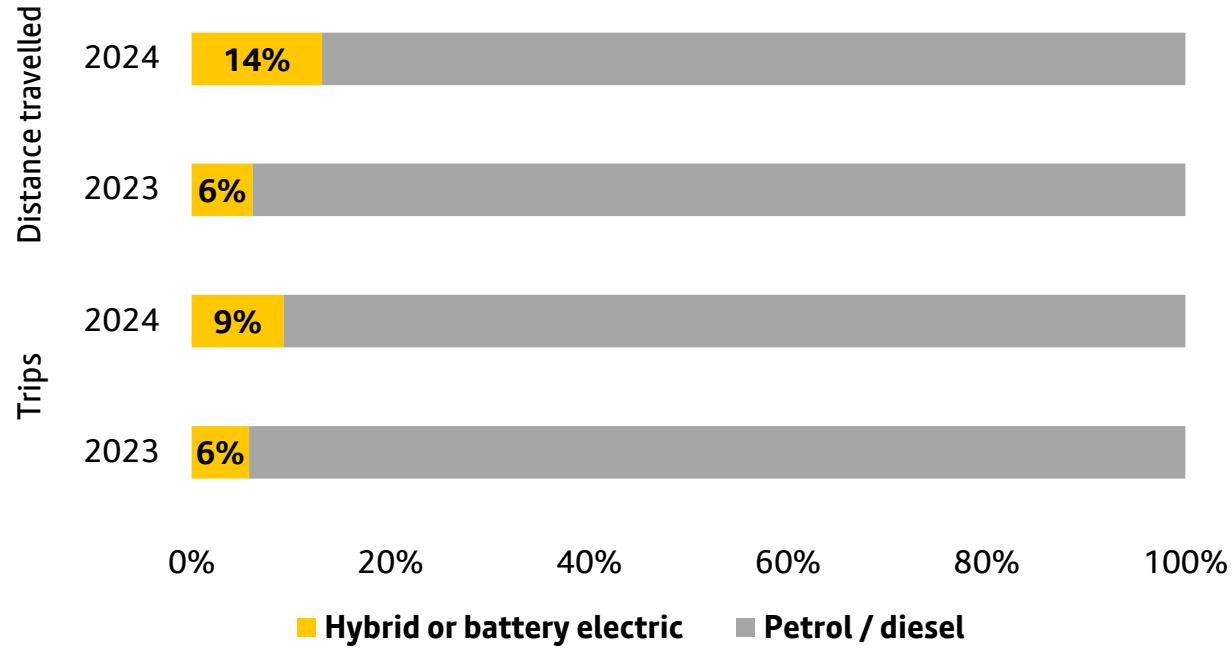
In 2024, 5% of all trips by GM residents were made in an electric car/van (including hybrid vehicles), compared to 3% of all trips in 2023. At 5% of the total travel market, this was broadly similar to the share of the market held by public transport (bus, tram, and train trips account for 6% of the market).

In 2024, 9% of the total distance travelled by GM residents was in an electric car/van (including hybrid vehicles), compared to 4% of the distance travelled in 2023.

Figure 36 shows how in 2024, electric vehicles (including hybrid vehicles) accounted for 14% of the distance GM residents drove[9] in their cars/vans, compared to 6% in 2023. It also shows how electric vehicles (including hybrid vehicles) accounted for 9% of the trips GM residents drove in their cars/vans, compared to 6% in 2023.

[8] We will look to disaggregate this grouping of vehicle fuel types as soon as it becomes practical to do so within the limitations of the TRADS sample.
[9] Car driver trips only.

Figure 36: Percentage of GM resident car or van travel (trips and person km) by fuel type

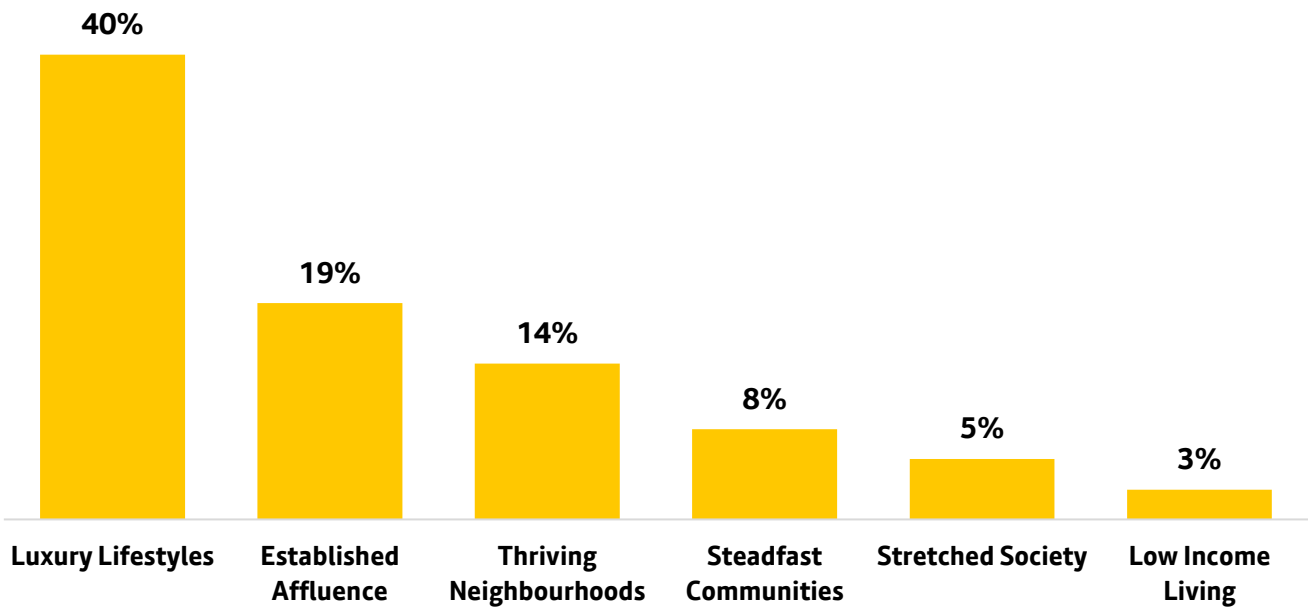


Source: GM TRADS (2023, 2024)

8.4 Distribution of electric (including hybrid) vehicles by Acorn Category

Figure 37 shows that, in 2024, 40% of GM households that were classified as being in the Luxury Lifestyles category had access to at least one hybrid, electric, or alternative fuel car. The proportion of households with access to a hybrid, electric, or alternative fuel car drops with affluence, with households in the most deprived Low Income Living category being over 10 times less likely to have access to such a vehicle (3%) than those in the Luxury Lifestyles category (40%).

Figure 37: Percentage of households with hybrid, electric, or alternative fuel car - by Acorn Category



Source: GM TRADS 2024 & Acorn 2024

9. In focus 2: Exploring the stages of public transport trips

9.1 Key facts summary - active travel stages of public transport trips by GM residents

- In 2024, 155.5 million public transport trips, involved 261.5 million active travel stages (260.3 million walking stages and 1.2 million cycling stages).
- On average, each public transport trip also included 1.7 active travel stages.

9.2 Active travel stages of public transport trips by GM residents

Our second in-focus topic looks at the stage breakdown of trips made by GM residents.

Recent changes to how TRADS captures information about trips means that, for the first time, we can analyse the stages that GM residents make as part of their trips.

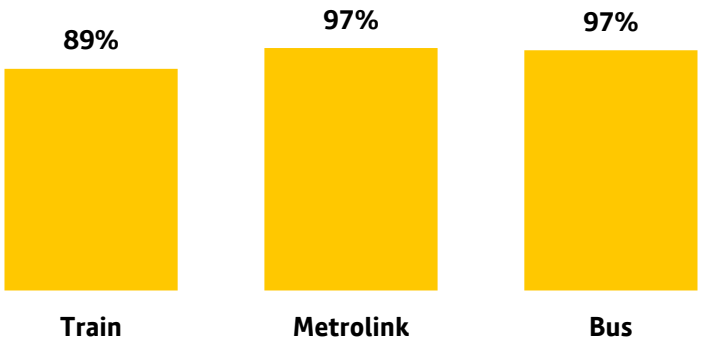
A stage is part of a trip. For example, for a commute trip the main method of travel could be bus. However, the trip could also include a walk to the bus stop and then the walk from the bus station to the destination. This trip would therefore include three stages, walk-bus-walk.

This section provides some more detail about these stages, with a specific focus on active travel stages as part of public transport trips.

In 2024, 155.5 million public transport trips, involved 261.5 million active travel stages (260.3 million walking stages and 1.2 million cycling stages). Therefore, on average, each public transport trip also included 1.7 active travel stages.

The different types of public transport were not all equally likely to involve active travel stages. Metrolink and bus trips were more likely to involve at least one active travel stage than train trips (see Figure 38).

Figure 38: Percentage of public transport trips that included at least one active travel stage



Source: GM TRADS 2024

By combining single-stage and multi-stage trips, we can estimate the average number of active travel stages completed by a GM resident each year and compare this to the average number of active travel trips.

Figure 39 shows that, in 2024, GM residents completed an average of 347 walking stages, of which 233 were full trips.

For cycling, residents averaged 21 trips and 21 stages, showing that most cycling trips only involve a single stage. Although there were an additional 1.2 million cycling stages overall, this only adds about 0.4 stages per person per year, so the difference between trips and stages for cycling is minimal.

Figure 39: The average number of active travel trips and stages that Greater Manchester residents made in 2024

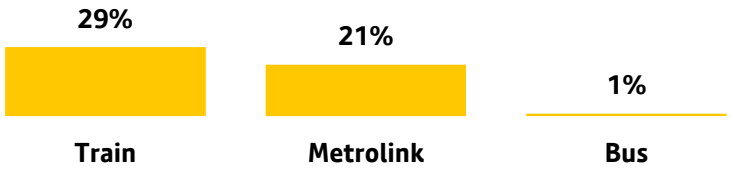
	Trips	Stages
Walk	233	347
Cycle	21	21
Total	**254**	**368**

Source: GM TRADS 2024

9.3 Car/van or taxi stages of public transport trips by GM residents

As Figure 40 shows, train trips were the most likely to involve at least one car/van or taxi stage (29% of train trips), followed by Metrolink (21% of Metrolink trips). Only one percent of bus trips involved a car/van or taxi stage.

Figure 40: Percentage of public transport trips that included at least one car/van or taxi stage



Source: GM TRADS 2024

Glossary

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

2040 Right Mix vision - 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 public transport, walking and cycling, while ensuring there is no increase in overall motor-vehicle traffic in GM (2017 baseline). More details can be found at https://tfgm.com/strategy-supporting-documents.

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

Acorn Categories – the UK population is segmented into seven Acorn Categories: Luxury Lifestyles; Established Affluence; Thriving Neighbourhoods; Steadfast Communities; Stretched Society; Low Income Living; and Not Private Households.

- **Luxury Lifestyles** – the most affluent people in Britain, confident consumers with high levels of savings and investments, living in the most expensive properties. © CACI 2023
- **Established Affluence** – wealthy and successful people living in large houses which they own in affluent, high-status areas of the country. © CACI 2023
- **Thriving Neighbourhoods** – comfortable, stable families and empty nesters who have a good standard of living, on an income above the UK average. © CACI 2023
- **Steadfast Communities** – this category contains much of middle of the road Britain with working families on incomes just below the UK average. © CACI 2023
- **Stretched Society** – traditional working-class areas of Britain containing younger families, flat sharers and students privately renting their homes. © CACI 2023
- **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 2023
- **Not Private Households** – these are postcodes where the bulk of the residents are not living in private households. © CACI 2023.

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

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

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. The statistics in this report from the census are car keepership and tenure.

Confidence interval – having a 95% confidence interval of +/-1% and an estimate of 50% means that if we measured something in exactly the same way, 95 times out of 100 we would expect to get values between 49% and 51%. It is the margin of error associated with an estimate.

Escort – an escort stage or 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.

Greater Manchester (GM) – includes the ten metropolitan boroughs: Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, and Wigan.

Greater Manchester Travel Diary Survey (TRADS) – the survey that this report is based upon. It collects transport and travel information from all residents of 2,000 households per year, gathering data regarding all trips made by each resident 5 years of age or older 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.

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

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

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 and 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 and 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 stays). 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 type of travel – 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, tram.

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

Metrolink – the tram/light rail system in GM.

Mortgage (incl. shared ownership) – occupants live in a property that has been bought with a loan (typically from a bank or building society) that is in the process of being paid off. A shared ownership mortgage allows the occupants to buy a share of a property and pay rent on the rest.

Owned outright – where the household owns all the accommodation.

Owner occupied mortgaged household – refers to a residential property where the owner of the property also holds a mortgage on that property (see 'Mortgage (incl. shared ownership)).

Peak period – the busiest or most popular time.

People and Place categories – the Greater Manchester 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 https://tfgm.com/2040-transport-strategy. This document also includes references to a new Town Centres People and Place category which has been introduced to reflect the important role that Town Centres will play in helping to deliver our 2040 Right Mix vision.

Percentage points – denotes the difference between two percentages. For example, a change from 10% to 15% is an increase of 5 percentage points (PP).

Person km – (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.

Plug-in cars – in this document refers to cars that use a plug-in technology to connect to a source of electricity.

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.

Private rent (incl. rent free) – households where residents rent through a private landlord or letting agent, or live rent free.

Public transport – includes buses, trains, and trams.

Rail-based types of travel – includes both light (trams) and heavy rail (trains).

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

Stage – a continuous movement by a single mode of transport. Each time a person changes their mode of transport (eg from walking to bus, or from bus to train), a new stage begins. The concept is used to break down trips into manageable segments, which is especially

helpful when seeking to understand multi-modal trips. In other documents the term 'leg' may be used to refer to what we refer to as a 'stage' in this document.

Start hour – the hour in which a trip begins. For example, if a trip starts at 9.58am its start hour will be 9am-9.59am.

Statistical significance – is a concept in statistics that indicates whether an observed effect is likely to be 'real' and not due to random variability that is inherent when measuring a sample (sub-set) of a population. For example, the difference in estimates between two samples are statistically significant when the difference in the estimates is larger than the confidence interval for comparing two samples of their given size (see Figure 41 for examples).

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 mix – refers to the percentage distribution of trips taken by GM residents using different types of travel.

Travel market – all travel by GM residents associated with a specified type of activity or activities - eg education travel market which includes pupils whose journey purpose is education, as well as 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 types of travel used, or a change to a different vehicle of the same type.

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.

Appendix

What is TRADS?

TRADS collects transport and travel information from all residents of 2,000 households per year, gathering data regarding all trips made by each resident 5 years of age or older[10] 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. The survey sample is designed so that each GM district is represented proportionately, based upon the demographics of the resident population. The survey programme covers the duration of a full year (beginning of February until the end of January the following year), with surveys in-field every day, excluding Christmas Day and any day after a bank holiday.

Data is collected on about 10,000 trips, made by 4,500 residents of 2,000 GM households each year. The information gathered includes trip origins and destinations, travel times, types of travel used and journey purpose.

The information is used by TfGM primarily for the purpose of developing and monitoring transport policy, strategy, schemes and interventions.

Prior to the pandemic our trip estimates were based on data collected over a three-year period, which provided confidence intervals of +/- 1% at the GM household level. This was possible because people's travel habits were relatively stable over the short-term. However, since the start of the pandemic in 2020, people's travel habits have not been stable enough for this approach to be used, so our estimates are based on survey data from a single year (with confidence intervals of +/- 1-2% at the GM household level).

Caution should be taken when interpreting the sub-group estimates of commute trips, short-trips, age, and by hour and purpose. The confidence intervals around these estimates are much larger and the findings should be treated as indicative.

At the GM-level, differences between estimates for two different years must be at least as large as the values in the following table (Figure 41) to be considered statistically significant. For example, if the estimates being compared are around 50%, and the years being compared are 2016-18 and 2017-19, then the difference between the two estimates needs to be at least 2%. However, if the estimates being compared are around 10%, then the difference would only need to be at least 1% to be statistically significant.

[10] It is assumed that residents aged under 5 won't travel alone or have any choice about how/when/why they travel.

Figure 41: Statistically significant confidence intervals between survey periods

Years being compared	95% Confidence Interval		
	50%	70%/30%	90%/10%
2016-18 to 2017-19	2%	2%	1%
2016-18 or 2017-19 to 2021 or 2022 or 2023 or 2024	3%	2%	2%
2021, 2022, 2023, and 2024	3%	3%	2%

The transport mix figures for 2023 were a good reminder that while TRADS produces robust estimates, it is survey data and, as such, is subject things like sampling error and confidence intervals.

As an example, the bus share of the transport mix was down from 6% in 2022 to 4% in 2023. As we can see from Figure 41, this difference isn't larger than 2%. Therefore, statistical tests find that the difference between bus's share of the transport mix in 2022 and 2023 isn't statistically significant. Essentially, this means we can't rule out that there has been no change between the two years.

However, while the impact on the transport mix was relatively small (6% to 4%) and is not statistically significant. The impact on annual our bus trip estimates, while still not statistically significant, appears as a large difference. For bus, TRADS trip estimates for 2023 were down 25% compared to 2022. This is in stark contrast to the 8% increase as measured by TfGM Continuous Passenger Survey (annual rolling patronage comparison Q3 2022 vs Q3 2023).

Generally, year-on-year there is a remarkable amount of stability in the trip estimates from TRADS, even for types of travel and journey purposes that are small. For example, the number of taxi trips recorded each year has been around 100,000 daily trips since 2017. Just because the estimates can, in an occasional year, vary in the way described above doesn't mean that they will. Therefore, with TRADS trip estimates it is better to focus on changes across multiple years, rather than overinterpreting year-on-year changes.

People and Place category definitions

We have used the following five people and place category definitions alongside TRADS to help quantify travel:

Figure 42: People and Place category definitions used alongside TRADS

People and Place category	Includes	Except
Neighbourhood	Trips less than 2km (straight line) with at least one end within Greater Manchester	• Trips with a non-work attraction end at Manchester Airport and surrounding developments • Trips with an end in either the Regional Centre or a town centre
Wider City Region	Trips with at least one end in Greater Manchester, and both ends no more than 10km outside the Greater Manchester boundary	• Trips with a non-work attraction end at Manchester Airport and surrounding developments • Trips with an end in either the Regional Centre or a town centre • Trips under 2km
Regional Centre	Trips with an end in the Regional Centre	• Trips with a non-work attraction end at Manchester Airport and surrounding developments • Trips with an end either in a town centre or more than 10km outside the GM boundary
City-to-City	Trips with one end in Greater Manchester, and the other more than 10km outside the Greater Manchester boundary	• Trips with a non-work attraction end at Manchester Airport and surrounding developments
Town Centres	Trips with at least one end in a town centre[11], and neither end more than 10km outside the Greater Manchester boundary	• Trips with a non-work attraction end at Manchester Airport and surrounding developments

[11] Town Centres included are: Altrincham, Ashton-under-Lyne, Bolton, Bury, Eccles, Leigh, Oldham, Rochdale, Stalybridge, Stockport, and Wigan.

Figure 43: Zoning system used in People and Place category analysis