Greater Manchester

**MOBILITY ANALYSIS**

- **Performance and resilience**
  - Congestion
  - Public transport reliability
  - Transport safety
  - Integrated mobility
  - Modal diversity

- **Vision and leadership**
  - Vision and strategy
  - Investment
  - Innovation
  - Regulatory environment
  - Environmental sustainability initiatives

- **Service and inclusion**
  - Public transport density
  - Transport affordability
  - Air quality
  - Customer satisfaction
  - Accessibility

**KEY MOBILITY STATISTICS**

- **Public transport options**
  - Commuter rail, light rail including tram, bus

- **Monthly public transport pass**
  - US$90

- **GDP per capita**
  - US$61,273 (£49,792) (2017)

- **Principal transport authorities**
  - Transport for Greater Manchester (TfGM)

**JOURNEY MODAL SPLIT**

- **PRIVATE CAR** 52%
- **PUBLIC TRANSPORT** 18%
- **WALKING** 25%
- **BICYCLE** 5%
- **OTHER:** 0%

**FUTURE OF MOBILITY CAPABILITY**

- **Manchester**
  - **Significant work to do**
  - **Passive environment, a number of barriers**
  - **Proactive environment, some barriers**
  - **Proactive environment, few barriers**

**STRENGTHS**
- Detailed plans introduced in the past two years cover air quality, congestion, rail improvements, bus reorganisation and network integration
- Metrolink tram services are highly reliable – less than 1 per cent are cancelled and over 90 per cent arrive on time
- Since the direct election of a mayor in 2017, transport has become a greater priority for the Greater Manchester Combined Authority

**CHALLENGES**
- The main mode of public transport is the bus network, but service is inconsistent across the 10 boroughs
- The train network that is not locally controlled suffers from frequent price hikes and unreliable service – less than 60 per cent of services run on time
- Road schemes make up the largest share of transport investment and add to congestion and pollution
Greater Manchester's transport authorities have taken a two-pronged approach to reducing congestion, by increasing the provision of public transport and improving traffic management.

- As part of a ten-year plan to integrate all transport modes, TfGM introduced zonal fares and contactless payments on the Metrolink tram system in July 2019, only the second UK city to roll out an aggregated pay-as-you-go system.
- A 2019 consultation proposed the return of the bus network to public control, under a franchising model. Reforming the market would foster coordination among private companies, who decide routes, timetables, fares and service levels, and also advance integration plans.
- The Congestion Deal announced in 2018 has invested in road improvements, a 24/7 control centre to monitor traffic, and a smart traffic system.

Manchester has a comprehensive strategy for its transport system to 2040, with increased commitments from the central government to improve transport infrastructure in the north of England.

- Longer-term plans include the £39bn Northern Powerhouse Rail, designed to improve connections between major cities in the north of England, and starting with faster links to Liverpool and Leeds.
- The BeeNetwork plan to invest £1.5bn over ten years in 1,800 miles of walking and cycling routes could get a boost from COVID-19-related plans for a £10m new bike hire scheme, and 116 km of pop-up cycle lanes in the city centre.
- A £120m redevelopment of the Stockport interchange, due to start in 2020, will convert the 40-year old bus station into a multi-modal travel hub, with a £1bn tram extension to the interchange.

TfGM is working to expand the public transport network while keeping prices affordable. Its plans to improve air quality have experienced delays due to COVID-19.

- The tram network has expanded rapidly, from 39 km of track in 2010 to 97 km in 2019, and now extend into seven of the ten boroughs. Passenger numbers increased from 19 million in 2010 to 45.5 million in 2019. The Trafford Park line opened in January 2020.
- Air quality remains a problem in certain corridors. Plans to implement a Clean Air Zone in 2021 have been postponed until 2022 at the earliest. Plans would involve an investment of £114m to retrofit vehicles.
- Tram prices are capped at the cost of an adult one-day travel card. The Our Pass scheme provides free bus travel for 16- to 18-year olds across Greater Manchester.

More than 2.1 billion journeys are made across Greater Manchester each year, and over 50 per cent are in cars, making it the second-most congested city in the UK. The mayor introduced the Congestion deal in 2018 that seeks to invest in public modes – buses, trams and a planned bike-share scheme – and make Manchester a leading green city in Europe. The city has a number of plans for achieving these goals. In recent years, the city has invested in its popular tram system and in 2019 introduced a contactless payment system. It now seeks to reorganise its bus system and integrate ticketing and fares with the trams. The objective is to increase passenger numbers by 27 per cent. The city needs to sort out the funding of projects, so that implementation can keep pace with its ambition.

DELLOITTE CITY MOBILITY INDEX 2020
Greater Manchester

SUMMARY

Greater Manchester has a number of plans for achieving its goals. In recent years, the city has invested in its popular tram system and in 2019 introduced a contactless payment system. It now seeks to reorganise its bus system and integrate ticketing and fares with the trams. The objective is to increase passenger numbers by 27 per cent. The city needs to sort out the funding of projects, so that implementation can keep pace with its ambition.

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About the Deloitte City Mobility Index
The Deloitte City Mobility Index reviews major cities on key aspects of mobility and the resulting relationship to economic performance. Drawing on publicly available data, client conversations, and bespoke Deloitte analyses, we assess each city's ability to transport its citizens both now and in the future and therefore its potential to bring prosperity to the city.

As we receive feedback, we will update and expand the analysis, which may mean the results shown in this document may change.

For the full interactive index, visit the Deloitte City Mobility Index at deloitte.com/insights/mobility-index.
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