



Analysis area

Manchester

Analysis area: 1,277 km² | Population: 2,782,000 (2016) | Population density: 2,179/km²

Definition of analysis area: Greater Manchester which includes 10 boroughs and City of Manchester

MOBILITY ANALYSIS

EMERGING
ASPIRING
TOP PERFORMER
GLOBAL LEADER



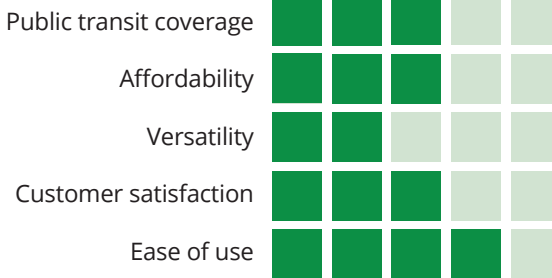
Performance and resilience



Vision and leadership



Service and inclusion



KEY MOBILITY STATISTICS

Tram, bus
Public transit options

39 hours/year
Time spent in congestion

\$149
Average public transit pass/month

\$70.68 billion
GDP
(OECD report, 2013)

Major transit authority
Transport for Greater Manchester (TfGM)

Note: All dollar amounts are in USD.

JOURNEY MODAL SPLIT

PRIVATE CAR



58%

PUBLIC TRANSIT



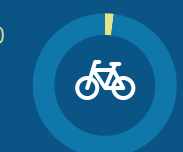
10%

WALKING



28%

BICYCLE



2%

OTHER: 2%

FUTURE OF MOBILITY ANALYSIS

Manchester



Significant work to do

Passive environment, a number of barriers

Proactive environment, some barriers

Proactive environment, few barriers

FoM global leader

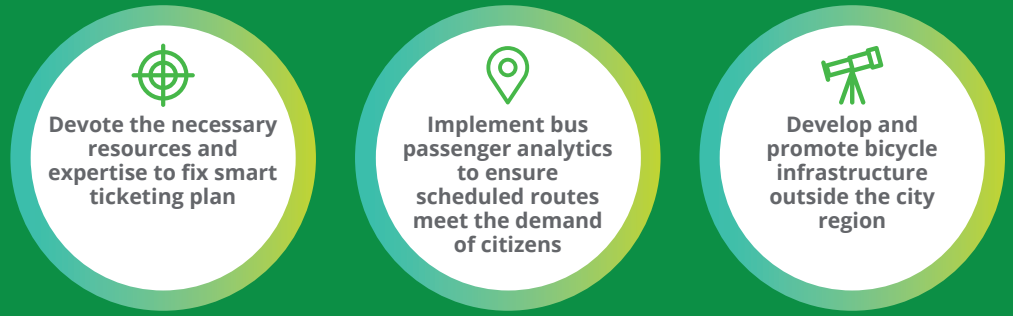
STRENGTHS

- Strong performance in FoM readiness strategy and vision
- Conducive regulatory environment with national legislation to improve open data availability
- Greater Manchester Electric Vehicle Scheme for promoting EVs in the city

CHALLENGES

- Lack of integrated ticketing options across modes of transportation
- Low interest in carsharing, ridesharing, and bikesharing services
- Low activities of venture capitalists and start-ups in the area of Smart Transportation

Key focus areas to improve city mobility and realize the Future of Mobility:



MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

With a growing light rail network, improving public transport reliability, and shared mobility programs, Manchester performs well.

- Bus service is reliable and popular: The bus is the most popular mode of public transport in the city, accounting for over 75 percent of total passenger use. Since 2010, overall punctuality of the bus service has increased considerably to 83.6 percent from 76.8 percent.
- Strong growth of Metrolink: Recent investments and expansion of tram network has led to a significant increase in passengers accounting for 79 percent of total annual passengers since 2011.
- Low congestion, despite high reliance on private transportation.

 **Vision and leadership**

A clear long-term city vision, backed by investment and plans to adopt new technologies. Improvement needed in its integrated smart card system.

- Bus Services Act 2017: The act gives the mayor the ability to decide the routes, set fares, and install quality standards for all buses in the city. This may improve public bus services and overall ridership, if put to use by local city authorities.
- Implementation of integrated smart cards for the public transit system is marred with delays and challenges.
- Plans for autonomous vehicle tests in real-world conditions between Stockport Railway Station and Manchester Airport.

 **Service and inclusion**

Its transport system is vastly accessible, with a similar number of bus routes to London despite being half the latter's size. High cost is a concern.

- Low affordability: A low median income along with high fuel and public transport costs make Manchester an expensive city to get around in, particularly for low-wage workers.
- Inclusive public network: Initiatives are in place to offer access to the disabled. It provides wide coverage, as 82 percent of the population live within 1 km of regular transit services.
- Three programs for promoting shared mobility: Regional Centre Car Share provides shared car hire; CarShare GM allows citizens to share rides in private cars; and Mobike is the United Kingdom's first dockless bikesharing system.

SUMMARY

Manchester's transport network serves it well. Public transit is accessible and has had some recent upgrades, but most citizens still see driving as a preferable option because of the high cost of public transport. The city's reliance on private cars must be addressed.

The city shows some promise in overcoming these challenges and embracing the Future of Mobility by supporting shared mobility, electric vehicle schemes and testing autonomous vehicles. Progress must still be made to catch up to other cities in areas such as smart payment systems and transport data infrastructure.

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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.

For Deloitte's insights on the Future of Mobility, visit deloitte.com/insights/future-of-mobility.

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