Transport for Greater Manchester – Written evidence (TTS0056)

1. Introduction

This written evidence has been submitted by Transport for Greater Manchester.

Greater Manchester is a city region of 500 square miles and a population approaching three million. It has a densely populated urban core, surrounded by a diverse mix of towns and major employment, education, hospital and leisure destinations. It is a conurbation of multiple town centres and a central core comprising Manchester city centre and the surrounding densely developed areas such as Salford Quays. The massive diversity of trip patterns across such a complex geography is a primary reason why Greater Manchester needs a thoroughly integrated public transport system, to be able to offer alternatives to car travel for a large range of trip types, and to offer accessibility to the widest range of passengers.

Greater Manchester's 'Bee Network' vision for a fully integrated public transport system, with trams, buses, cycling and walking joined together by 2024 and with rail incorporated by 2030, is set to transform how people travel across the city region. This vision[1], *Destination: Bee Network*, underpinned by Greater Manchester's existing statutory plan for local transport, the 2040 Transport Strategy, and the accompanying Five Year Delivery Plan (2021-2026), puts public transport at the heart of Greater Manchester's ambitions for long-term, sustained economic growth, levelling-up and decarbonisation.

With long-term public transport planning, integration and delivery as a cornerstone of the creation of a stronger, fairer and more sustainable city region economy, Greater Manchester is working with Government and other partners to build a consensus around the policy framework, delivery and funding mechanisms required to ensure the long-term ambition can be delivered.

In the wake of the Coronavirus pandemic and given its ongoing impact on public transport, it is crucial that Government continues to work constructively with city-regions and transport authorities to invest in high quality public transport as a public good, as a crucial foundation for a well-functioning economy, and, not least, as an essential set of measures to support the shift to a zero-carbon transport network.

GM recognises that bus is the most cost-effective, rapid and flexible public transport mode. It has the potential to play a stronger role in supporting sustainable growth and supporting levelling up, which is why GM are prioritising this mode for reform and investment.

Question 1. What are the current and anticipated levels of public transport demand and capacity in towns and cities in England? What

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[1] https://tfgm.com/destination-bee-network

influences public transport travel patterns? How does the choice of public transport vary across different demographic groups?

<u>Current public transport demand in Greater Manchester</u>

COVID-19 has had a profound impact on travel patterns in Greater Manchester (GM) and the long-term effects are still largely unknown. Travel demand remains below pre-pandemic levels, although this is gradually changing and demand is returning slowly. In GM, bus trips are now at around 20% less than pre-Covid levels and trips on both the local rail network and Metrolink are around 30% less than pre-Covid levels.

It is vital, therefore, that Government and city-regions like Greater Manchester continue to work together to encourage demand and attract people back to public transport. Without appropriate support from central Government, there is a concern that operators will further cut back services thereby preventing the necessary public transport and active travel-based recovery from the pandemic. If this were to continue to happen, there would be serious economic implications as a result of a predominantly highway-led recovery over the longer term, which would mean even greater levels of inefficient, time-consuming congestion holding back higher levels of economic activity in our towns, cities and communities.

<u>Current and anticipated future public transport capacity</u>

One of the effects of the Covid-19 pandemic has led to capacity across public transport being on average under-utilised compared to pre-Covid levels. While passenger levels remain below pre-Covid averages, it is also true to say that some services on bus/tram/train are running near or at capacity.

The pandemic and the economy's response to it, for example an increase in homeworking and increasingly hybrid working, has disrupted traditional travel behaviours in a way which has seen less predictability in changes in demand levels.

The current signs indicate that leisure travel is demonstrating relatively strong recovery. This presents an opportunity to ensure this market is actively supported and stimulated. Commuting levels however are more varied than in the pre pandemic period.

Aside from influences brought about by the pandemic, it remains vital that we continue to encourage the shift to greater use of more sustainable modes (bus, Metrolink and rail) to provide the mobility required with those without access to a private car – around one third of households in Greater Manchester – to reduce congestion on roads, and to support decarbonisation. In order to do this, there must be enough capacity in the public transport network to enable and support future growth. In Greater Manchester for example, our economy has historically been actively held back by the critical lack of capacity in the rail network, which has long been operating at maximum capacity on key transpennine and north-south routes.

It is too early in the post-Covid context to know with a high degree of certainty what the future capacity requirements for public transport are. However, there is a clear policy rationale for being ambitious now to plan for public transport growth – not least in its key attribute of being able to provide low carbon mobility - and to build capacity as a long-term investment into our transport network. Given the uncertainty generated by Covid-19, TfGM have been through a process to develop different potential future travel demand scenarios to help us understand how transport and wider economic policy might need to adapt to deliver our policy agenda. These will be outlined in detail in question 2.

Influences on Public Transport Patterns

On top of proximity to town and city centres, two key factors which influence the decision to travel by public transport are:

- The quality of the transport; a regularly and reliably run service which is well maintained and pleasant to use.

- Affordably priced and easy to use ticketing.

Both of these factors are crucial in encouraging people to choose public transport over travelling by car.

The cost of parking in regional centres can also influence public transport decisions. In Greater Manchester, the regional centre represents one of the few locations in the region where driving cost (along with its inherently limited road capacity) is equal to the combined time and money costs of using public transport. As a result, many public transport trips are made by people who could have travelled by car but have chosen not to do so. This compares to a number of other parts of Greater Manchester where it still makes more financial and timesaving sense to travel by car.

As a local example, TfGM conducted travel pattern surveys of Metrolink users in October and November 2018 to ask whether a car or van was available for the journey they were taking that day[2]. The findings indicated a high level of attractiveness of all Metrolink lines to those with a car available, with almost half of users saying they could have travelled by car or van that day. This would suggest that the balance of quality of the service and affordability was enough to outweigh the convenience of travelling by car.

Public Transport Choices and Demographic Groups

Here in Greater Manchester - as is the case nationally (Department for Transport, 2017) - there is a relationship between household income and type of transport used. Those on lower incomes use buses more than those on higher incomes in this city-region. Around 40% of bus trips are made by people experiencing the most difficult social and financial conditions (the 'Urban Adversity' Acorn category) despite them only accounting for around a quarter of Greater Manchester's resident population (26%).

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[2] Metrolink Phase 3 Evaluation https://tfgm.com/corporate/metrolink-phase-3

Our data also shows that older people (those over 65) in Greater Manchester are more likely to use the bus than younger people (aside from those aged 16-24). Women, those from mixed ethnic backgrounds, Black or Black British people, and those with a disability or mobility impairment are also disproportionately more likely to travel by bus. These groups are also more likely to experience multiple forms of disadvantage and social exclusion.

Question 2. How might public transport travel patterns shift in the next 10 years? What impact could digitalisation and the Covid-19 pandemic have on travel patterns in the long term?

In Greater Manchester, we are aiming to achieve world class connections that support long-term, sustainable economic growth and access to opportunity for all.

To achieve this, our vision for the 'Bee Network', an integrated London-style transport system, plans to revolutionise travel across the city region over the course of the decade.

Local devolution has allowed GM to identify an evidence-based, long-term vision for the 'right mix' of transport modes on our network. Our Right Mix vision is for 50% of trips to be made by sustainable modes, with no net increase in car traffic, by 2040. As well as meeting the requirements of our travelling customers, our transport system needs to help the local economy to flourish and prosper, and our residents to contribute to and benefit from that prosperity without relying on car travel.

As part of our Bee Network and Right Mix visions, GM has also committed to a target of becoming carbon neutral by 2038, which is a key influence in our aims and objectives for public transport over the next 10 years, requiring a very significant shift in travel behaviour toward zero carbon modes if we are to achieve our objectives.

Anticipated public transport demand and patterns in Greater Manchester

TfGM's approach to understanding potential future public transport demand is to take into account a range of future scenarios with the following considerations:

- Strength of the economy, which affects travel behaviour directly, and also affects central government transport spending.
- Public attitudes, such as the priority given to the environment, which affects travel behaviour directly, and also affects central government policy (e.g. road-building versus public transport and active travel).

TfGM has developed a series of hypothetical post-COVID travel scenarios to support our strategic planning activities, bearing in mind the impact of increased digitalisation:

1. Travel returns as government restrictions are lifted, but subsidies are insufficient for full recovery on public transport. This leads to fares continuing to increase in real terms and services being reduced. More digital (ie home and hybrid) working causes reduced commuting, but also increases leisure travel, mostly by car.

2. Public transport demand exceeds pre-Covid demand within five years, stimulated by strong government subsidy, permitting lower fares. Business travel remains reduced by video conferencing.

3. A prolonged slump in public transport travel due to a weak economy and more digital working. Government subsidy is phased out while public transport travel remains weakened, resulting in higher fares and reduced services for bus, and heightened challenges for Metrolink and rail. Business travel is reduced by weak economy and permanent increase in video conferencing.

4. Public transport travel remains below pre-Covid levels, but is mitigated by continuing government subsidy, thereby permitting more affordable fares.

Question 3. What can be done to improve connectivity across public transport modes? How could better integration be delivered in urban areas outside London?

In GM, we aim to stop viewing different modes of transport as separate networks, with individual asset management, service planning, and fares and ticketing regimes.

Instead, integration through the Bee Network will enable Greater Manchester to make a vital contribution to the national challenges of decarbonisation and levelling up, while also ensuring a more efficient and resilient city region economy that creates opportunities for all residents.

Local control over Metrolink has allowed GM to plan over the long term for a network that meets the requirements of the city region. For similar reasons, Greater Manchester has pursued bus franchising to bring the buses under local control and allow integration with the Metrolink network. The GM Mayor has recently announced a journey fare cap on all single bus journeys, already demonstrating the benefits that a franchised system can bring to passengers.

GM is also keen to secure greater influence over local rail, particularly over fare structures, again to integrate with the Bee Network.

In terms of integration of delivery, technological developments open new opportunities for delivering an integrated and customer focused transport system to meet future customer needs. The development of new demand responsive technologies and applications will make it easier for people to plan, book and pay for journeys, with a daily fare cap and potentially as part of longer multi-modal trips. They will also allow for world class safety and customer experience standards across bus, tram, rail, taxi and private hire, supported with real time passenger information and audio-visual announcements.

Partnership work between operators and providers is critical to ensure that modes of transport such as taxis, private hire vehicles and other demand responsive services - as well as shared mobility solutions, including car clubs, cycle hire and other forms of shared transport - are available, and fully integrated into the transport network.

Question 4. What are the likely areas of innovation in urban public transport over the next 10 years? How should public policy be shaped considering both incremental and transformational innovations? How could data help transport services meet consumer demand?

A great deal of work is currently being undertaken by TfGM to identify and develop innovative solutions to today's transport challenges as well as to understand the challenges and opportunities that Greater Manchester's transport network may face in the future.

Areas of Innovation

Following the completion of successful projects and trials in recent years, several 'pathways to innovation' have been identified using cross-sectoral working to ensure developments in Mobility as a Service, Connected and Autonomous Vehicles (CAVs) and shared mobility can benefit our residents, communities and visitors.

'Mobility as a Service' refers to digital transport service platforms that enable users to access, pay for, and get real-time information on a range of public transport options. The growth of Mobility as a Service has the potential to improve customer experience of using public transport by:

- Enabling customers to plan a door-to-door journey, receive updates and pay for it, all via one channel;
- Increasing the feasibility of multi-modal, multi-leg journeys undertaken by public transport; and
- Simplifying ticketing options.

It is important that journey planning and wayfinding tools need to be available to customers 24/7 and they should provide customers with consistent, simple and straightforward information about their travel options. GM is aiming to adopt a digital-first approach, with technology increasingly enabling these apps and web-based tools to be tailored to the needs of individual customers.

Where feasible, data should be made available as Open Data to allow third parties to develop apps which will benefit public transport customers.

Projects such as eHUBS, GM's e-cargo bike hire scheme, are working in collaboration with the private sector to create community hubs with access to shared, electric, sustainable mobility solutions. eHUBS is a year-long pilot which aims to give people in parts of GM innovative electric alternatives to private cars, such as electric cargo bikes and car clubs, at an affordable price.

As part of any future public policy developments on new transport technologies, consideration should be given to:

- Mandating a minimum level of data sharing and the standardisation of data sharing arrangements; and

- Mandate access to ticketing systems to allow third party sales channels to develop. In practice, this would mean that any transport operator/provider (public or private) selling tickets would need to allow commercial providers to sell these tickets.

GM's main ask of Government in this area is that it continues its development of policy in close partnership with local transport authorities.

Question 5. Are local authorities well equipped with appropriate funding and powers to deliver high-quality public transport services? Would further devolution of transport policy contribute to better outcomes?

The pandemic has shown how fragile the funding for public transport can be, and that local authorities do not have the financial capability to protect this vital public service. This is shown by the level of central government support that has been, and continues to be, required to maintain the services that areas need.

Without significant and predictable capital and revenue investment, our existing transport networks and infrastructure will not be able to achieve sustainable and equitable growth in Greater Manchester. Investment in GM transport would work in the shared interests of GM and the Government by working towards shared objectives for growth, levelling up and decarbonisation.

Greater Manchester believes that more local decision-making leads to greater benefits for people and communities, including by enabling better development of a world-class, modern, integrated and reliable transport system. The opportunities offered by devolution and greater local determination of policies, funding and delivery allow us to take a much bolder and longer-term view of our transport needs.

Long-term devolved settlements that combine different investment proposals with wider proposals for housing, skills, innovation, infrastructure and regeneration would allow the Government and Greater Manchester to deliver tangible levelling-up and take decisive climate action with a world class transport system.

Question 6. Could better policy coordination across government departments, and between central and local government, improve public transport outcomes? If so, how can this be achieved?

Improved public transport has an impact on all areas of society – the economy, health and financial inequalities can all be influenced by public transport decision making.

With this in mind, delivering effective transport requires a whole government approach that encompasses a wide reach of government departments.

Although there are challenges with integrating public policy at the national level, it would potentially be more appropriate to do this at a city regional level.

Question 7. What are the barriers to improving urban public transport, in terms of delivering the necessary infrastructure, increasing connectivity and improving the consumer experience?

As outlined previously, funding limitations are the main barrier to improving public transport in and around Greater Manchester. Capital investment is a key factor that allows for improvement in all areas of public transport, including innovation, digitalisation and issues around accessibility.

On top of this, there is a need for better collaboration between Government agencies such as National Highways, Network Rail and local transport authorities.

Question 8. Are there other important changes, not covered elsewhere in these questions, which would improve matters?

No further comments.

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