Greater Manchester Transport Strategy 2050

Transport for Growth Evidence Report

Consultation Draft

Contents

Executive Summary

This report presents analysis of how targeted transport investment can drive economic growth in Greater Manchester (GM). It draws on local, national, and international evidence to identify the transport interventions most likely to support GM's growth ambitions, focusing on both sectoral priorities and spatial growth locations. The report is intended to inform the development of GM's new Local Transport Plan (LTP) and guide future investment decisions.

Key Findings

GM is the UK's fastest-growing city region, with output increasing by 39% between 2016 and 2022. However, despite a narrowing gap, productivity remains significantly below London and other European comparators, partly due to lower population density and consistent underinvestment in transport infrastructure.

The report highlights eight ways in which investment in sustainable transport supports growth including: providing affordable access to skills, jobs and investment; enabling sustainable development and regeneration; improving people's health and quality of life; and supporting cleaner air and lower carbon emissions.

GM's growth is driven by five "Frontier Sectors": Low Carbon, Advanced Materials & Manufacturing, Health Innovation & Life Sciences, AI, Cyber & Tech and Creative & Media. The report identifies how transport can support the specific needs of each of these sectors by improving access to skills and markets and supporting efficient exchange of knowledge and ideas.

The report also highlights how economic opportunity is unevenly distributed across GM and without excellent integrated transport provision (particularly by public and active travel modes), GM will not achieve its full potential and there is a risk that key communities will be left behind through transport related social exclusion.

Finally, the report discusses the specific ways in which good transport (embedded into wider regeneration and investment strategies) can support GM's people-and-place approach to delivering sustainable and inclusive growth, for neighbourhoods, town and city centres, and GM's growth locations, with a particular emphasis on shaping places which are less car-dependent through investment in high quality public realm, active travel and public transport networks (the Bee Network).

Integrated planning of transport, housing, employment and digital infrastructure will be essential to support GM's inclusive growth agenda and to achieve GM's transport target for 50% of journeys to be made by sustainable modes by 2050.

1. Introduction

Strategic Context

In July 2025, the UK Government published a new 10 Year Infrastructure Strategy[1] to support its central mission to kickstart economic growth and its goal to deliver: "*the highest sustained economic growth in the G7, with a focus on creating good jobs and increasing productivity across the country*."[2] The Infrastructure Strategy highlights the link between infrastructure investment and growth and, in particular, how poor transport infrastructure and services (at a national, regional and local level) can act as a major constraint on growth.

Greater Manchester has long understood the important role that public transport and active travel can play in fostering economic prosperity and providing equitable access to employment and opportunities for all. In recent years, there has been a particular focus on delivering a fully integrated transport network (now known as the "Bee Network"), which has included: significant investment in expanding the Metrolink tram network; bringing buses back into local control alongside significant investment in electric buses; new town and city centre transport interchanges; delivery of high quality walking, wheeling and cycling infrastructure; and roll-out of integrated fares and ticketing.

The Greater Manchester Strategy (GMS) has a vision for GM to be a "thriving global city region where everyone can live a good life". There are seven workstreams linked to this, spanning community safety, health, mobility and growth. Crucially, the missions set an ambition for growth which benefits all, through good jobs and effective public services.

To achieve this, the GMS identifies nine target impacts:

- A healthy home for all
- Safe and strong communities
- A transport system for a global city region
- A clear line of sight to high-quality jobs
- Everyday support in every neighbourhood
- A great place to do business

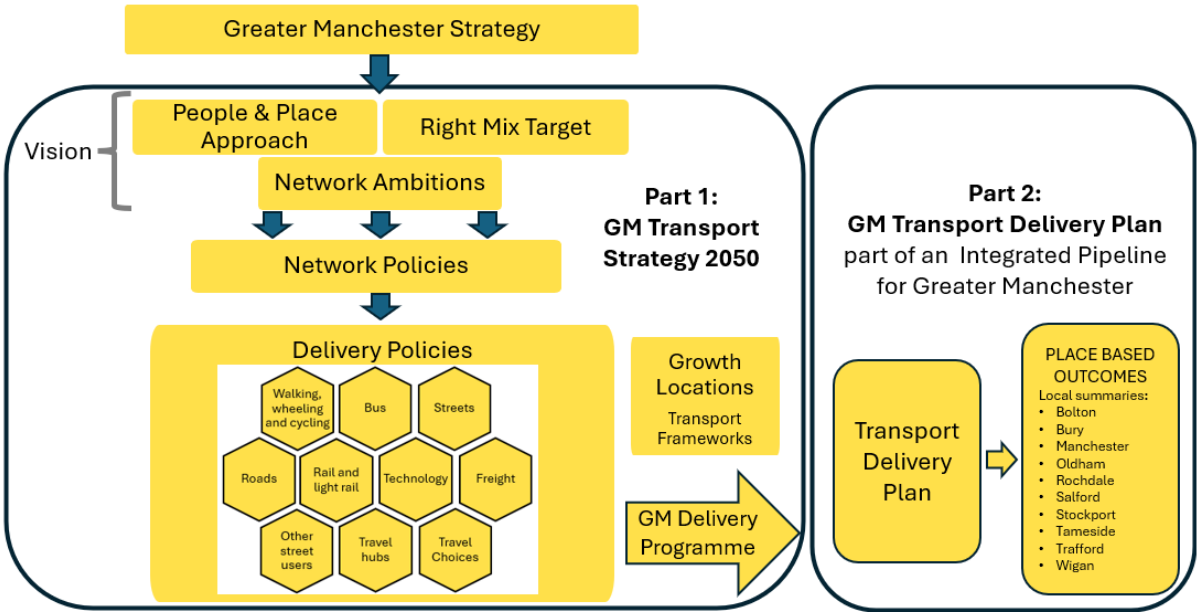
[1] HM Treasury and National Infrastructure and Service Transformation Authority (2025) UK Infrastructure: A Ten Year Strategy

[2] https://labour.org.uk/change/mission-driven-government/

- Digitally connected places and people
- A greener and more equal place
- Public services will be effective and fit for the long-term future

> "Our task for the next decade is to build a platform for success for all our residents. We've never believed in a "trickle-down" model of growth here – that if a few people and places do well then, somehow, that will benefit everyone. We know we will only change the fortunes of all our people and places if we're prepared to intervene and fix the foundations of life." – Andy Burnham, Mayor of Greater Manchester, July 2025

The Local Transport Plan (LTP) has a primary role in delivering the "Mobility" mission and developing a transport system for a global city region. Fundamentally, the LTP aims to create an integrated transport system that enhances sustainable connectivity and supports inclusive economic growth with more high-quality jobs and homes that benefit all GM communities, and which can be accessed by sustainable modes of transport.



It also recognises the role that transport plays as an "enabler" of GM's wider ambitions to be a happy, healthy and prosperous place to live. Transport is arguably one of the single biggest levers GM partners have to drive growth alongside wider ambitions.

Purpose of this report

This report presents a wide range of local, national and international evidence on the role that targeted transport investment can play in supporting a thriving economy which benefits everyone in GM. It identifies the transport investments that are likely to have greatest impact on enabling those sectors and locations which have been identified as being most important to GM's growth ambitions. This evidence will be crucial in shaping the development of all of GM's emerging strategic plans (in particular the new Local Transport Plan) and to inform the prioritisation and sequencing of GM's future investment pipeline.

Following consultation, there may be new data and economic analysis available that contributes to this report. TfGM will review relevant work and incorporate it into an updated version before adoption of the Local Transport Plan.

2. Economic Growth and Transport in Greater Manchester

GM is the second largest city region in the UK by GVA, behind only London with annual output of £89.5bn. Between 2016 and 2022, GM was the fastest growing city region in the UK, with output increasing by 39%, outpacing UK growth of 27% and growth in London of 22% over the same period.

Productivity is a key driver of economic performance. The Office for National Statistics (ONS) note that: "economic output can only be increased by either increasing the amount of inputs or by raising productivity. Changes in labour productivity are also related to changes in real wages. Increasing productivity is, therefore, an important aim for both national and local economies.[3]

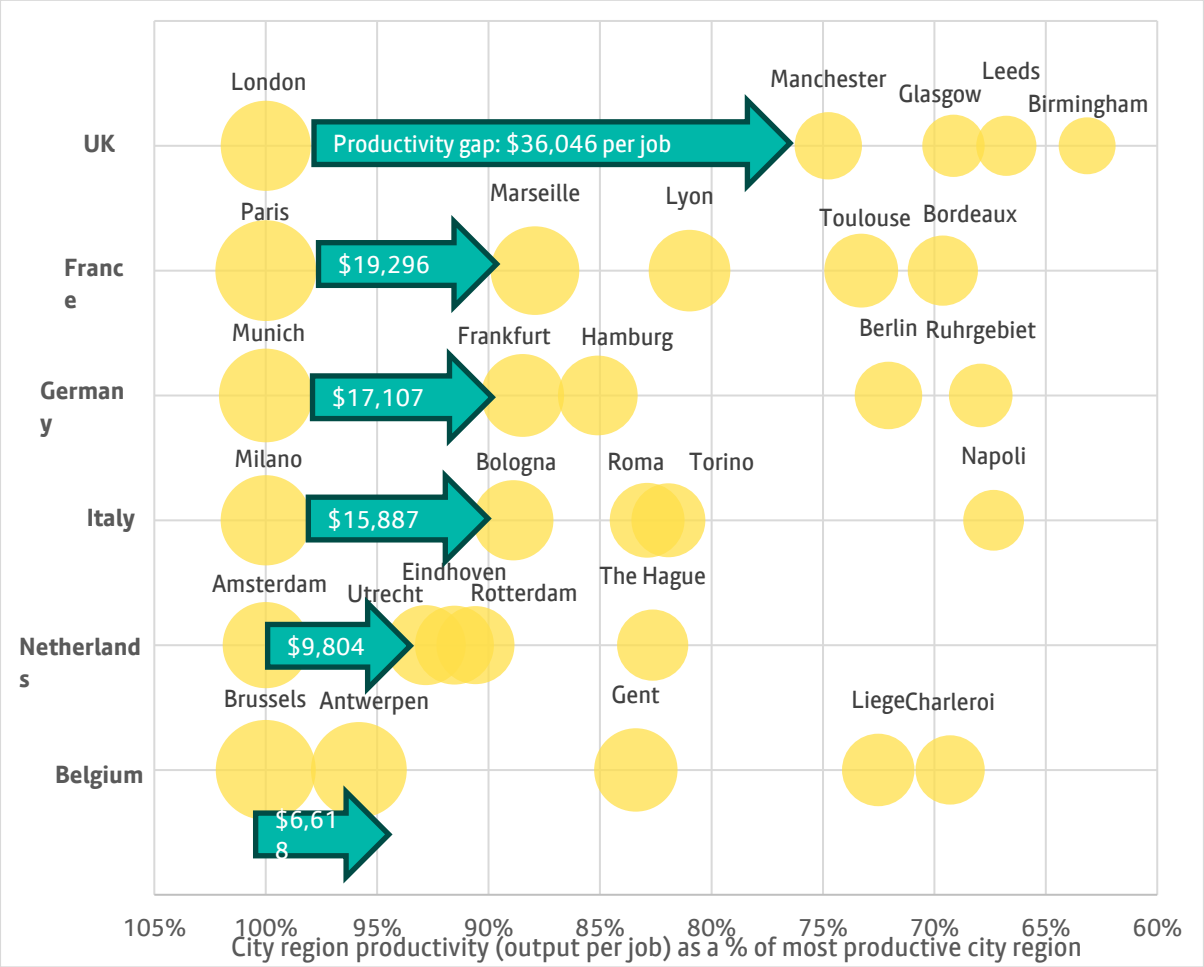
Since the 1970s, UK productivity has lagged other comparator nations (such as the UK, France and Germany) and has been particularly low over the last two decades (with growth rates falling from over 2% in the 1990s and early 2000s, to just 0.4% since 2007). Poor productivity has a real impact on people's lives and life chances. If productivity had remained at 2% the average UK worker might have been c. £5,000 a year better off, and there would have been tens of billions of pounds more available to pay for public services and tackling socio-economic inequalities[4].

Historically, productivity in the UK's regional cities has also significantly lagged behind London, to a greater extent than in other developed nations. Productivity in Greater Manchester was 25% lower than in London in 2021, according to analysis by OECD. This is bigger than the gap between, for example Paris and Lyon (19%), Milan and Rome (17%) and Brussels and Antwerp (4%). The three most productive second tier city regions in the Netherlands are all within 10% of Amsterdam's productivity levels (see Figure 2.1 below).

[3] Sub-regional productivity in the UK, ONS, 2020

[4] M. Emmerich (2023) Researching the city – an economic transition of Manchester: A case study.

Figure 2.1: Productivity in the top 5 city regions – selected European Nations (most productive city region = 100%)



Source: OECD Cities & Regions Atlas, 2025. Analysis of 2021 data based on Functional Urban Areas

There are many factors influencing this, including the UK's high levels of centralised decision making compared to comparators, historic concentration of investment in London and the south east (with London receiving on average 2.4 times as much public spending per capita than the North and almost double the UK average over the last 10 years of available data from 2013/14 to 2022/23[5]), and socioeconomic drivers such as skill levels and industrial structure.

Population density in Greater Manchester is much lower than in the Greater London areas. Census 2021 data shows that the GM local authority area with the lowest population density was Rochdale at c.1,400 residents per sq km, with the only local authority areas that exceeded c.2,500 residents per sq km (GM average was c.2,300) being Salford (c.2,800) and Manchester (c.4,800).

[5] IPPR (2025) On track to prosperity: Great Northern Rail

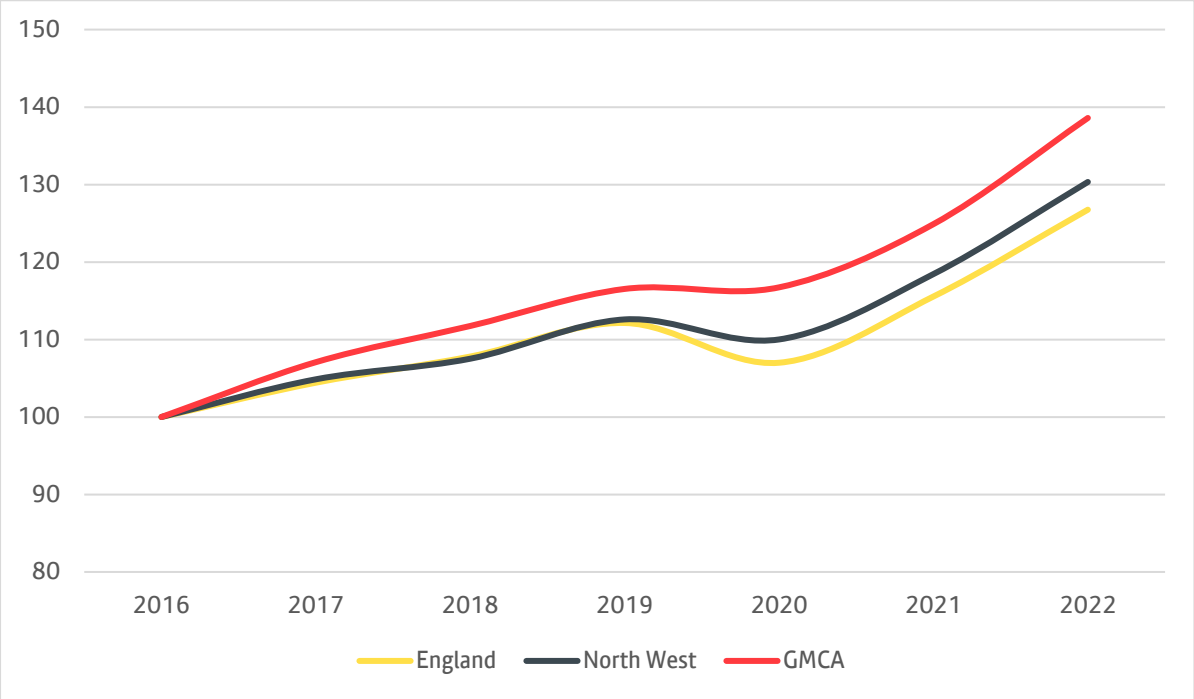
In comparison, the entire Greater London area (made up of the 32 London boroughs and the City of London) had a population density of c.5,600 residents per sq km, with 10 of the London boroughs having population densities over twice that of the Manchester local authority area (c.9,600 or more).

This is important because there is significant evidence that higher density cities, which support a significant clustering of people and businesses, tend to be more productive. They also tend to be more accessible (particularly when they are developed around high capacity and well-integrated public and active travel networks)[6].

GM has made some progress on closing the gap with London and the South East in recent years. Output per hour worked has increased by nearly 30% in GM between 2016 and 2022, against a 23% increase in England as a whole.

This has helped to improve relative living standards. It has driven a 33% increase in GVA per head in GM between 2016 and 2022. Again, this level of growth in GVA per head outpaces that seen across England, reflecting a narrowing of the gap as a key measure of prosperity.

Figure 2.2: GVA growth (Index 2016=100) 2016-22



Source: Regional gross value added (balanced) by industry: all ITL regions. ONS. 2025

[6] IPPR (2007) The Route to Growth: Transport, Density and Productivity

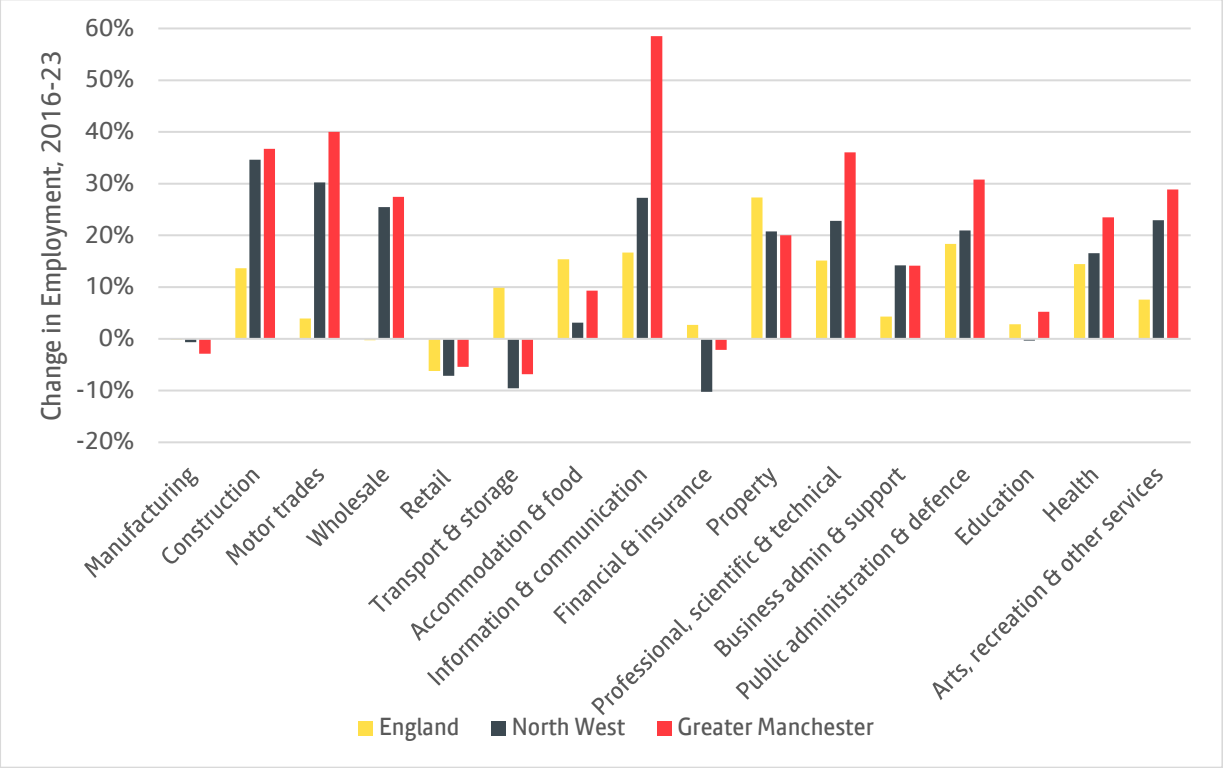
Sectoral employment and industrial structure

Over 1.4 million people work in Greater Manchester as of 2023. This represents an increase of 182,000 since 2016. Much of this growth has been driven by professional and knowledge service sectors.

The Information & Communication sector – home to much of the digital economy - has been the fastest growing sector overall in GM. The number of jobs has increased by nearly 60% since 2016 - 3.5 times faster than the sector's growth rate nationally.

Professional, Scientific and Technical Services such as legal and accounting have also shown strong growth, with employment increasing by 36%.

Figure 2.3: GM employment change by industry, 2016-23



Source: Business Register and Employment Survey (ONS)

The map below shows that jobs in knowledge intensive business services[7] (KIBS) (which includes the above sectors, plus others such as financial services) are highly concentrated in urban areas - particularly in Manchester and Salford, and to a lesser extent in town centres such as Stockport, Bolton and Rochdale. There are however some pockets of KIBS jobs away from urban centres.

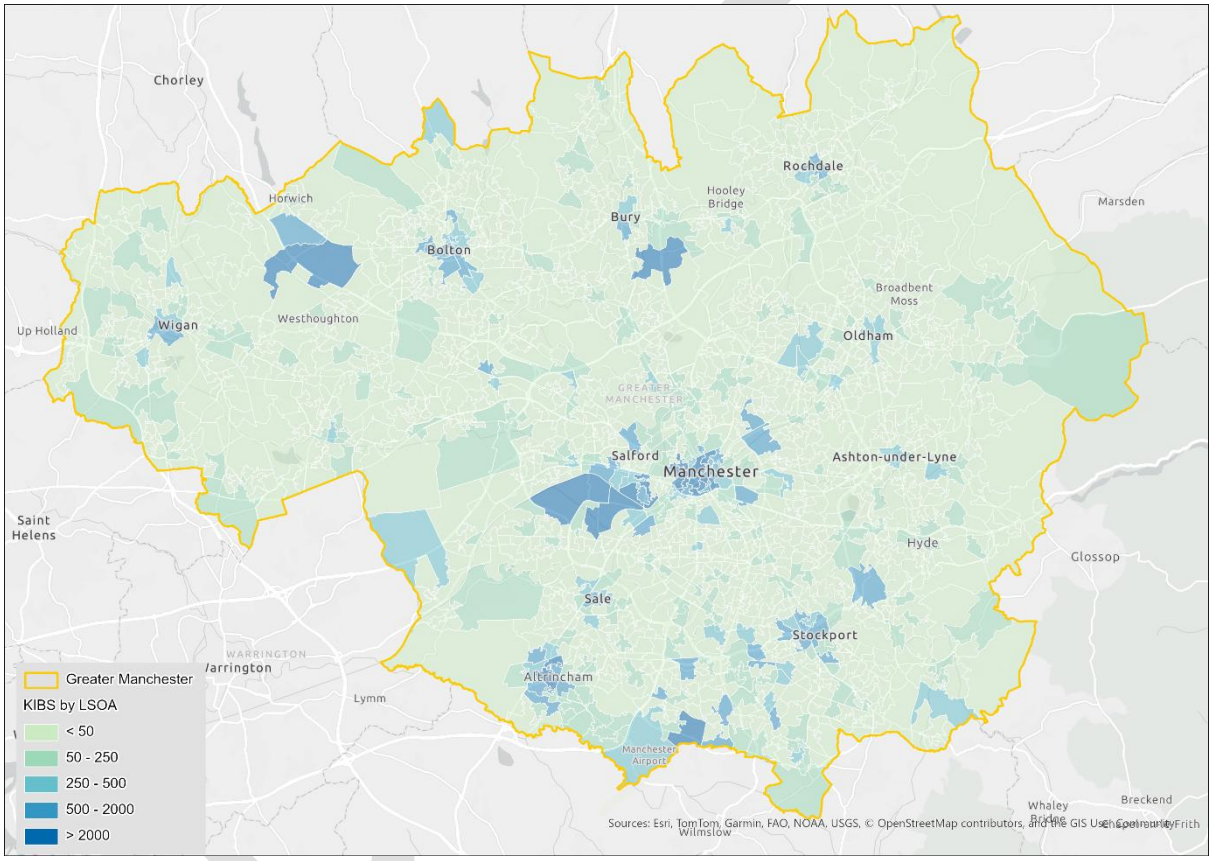
KIBS jobs are important due to the wider impact they can have on growth and productivity. These jobs in and of themselves tend to have higher levels of productivity than many other industries, and as a result are able to pay higher wages,

[7] This analysis uses the Centre for Cities definition of KIBS

which stimulates demand in the wider economy. KIBS firms also help to drive wider innovation in the economy, enabling the spread of knowledge and ideas across industries, increasing the creation and adoption of new ideas and processes.

Nearly two-thirds of GM's financial and insurance jobs are in the Regional Centre along with over half of information and communication jobs, and over a third of professional, scientific, and technical roles, emphasising the Regional Centre's role as the driver of growth.

Figure 2.4: Knowledge Intensive Services Jobs in Greater Manchester

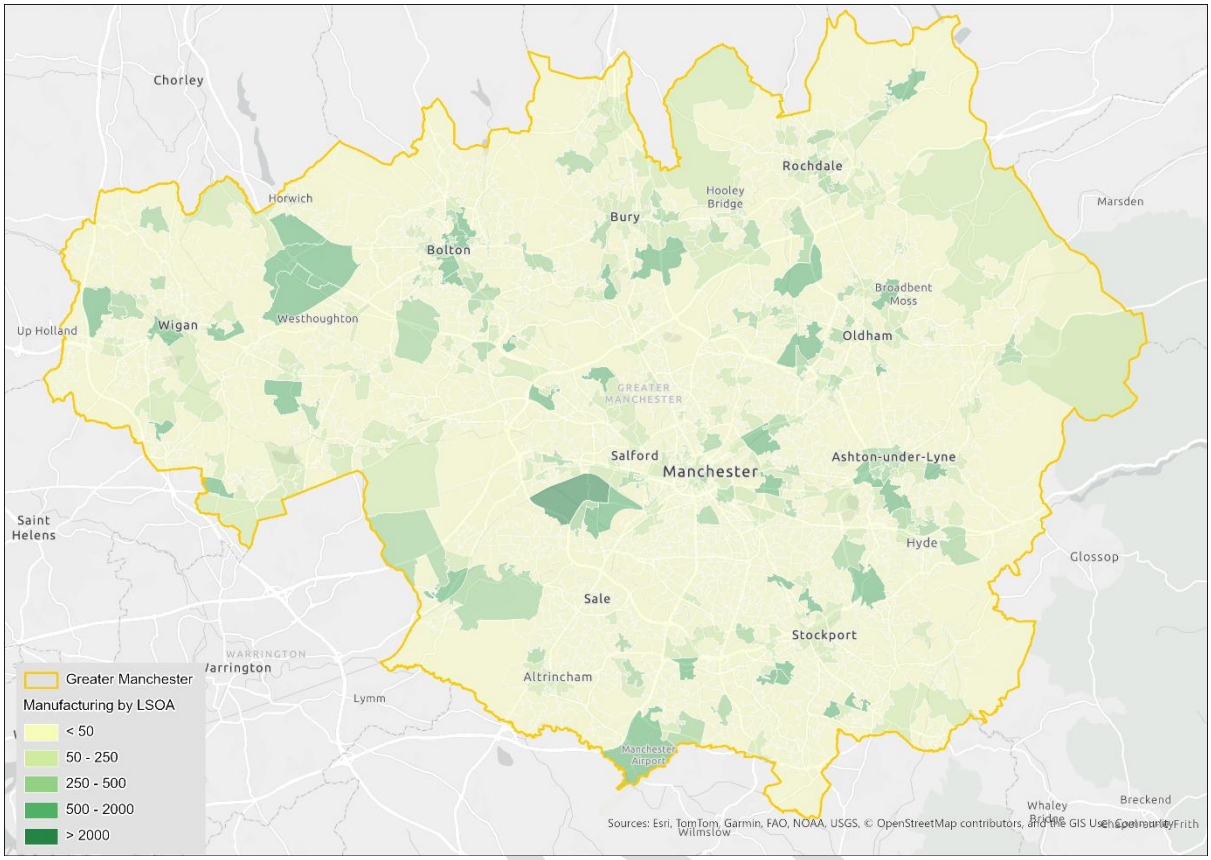


Source: Steer analysis of ONS Business Register & Employment Survey (BRES), 2023.

Conversely, some sectors have seen employment decrease over this period, including some which are crucial components of the GM economy. These include manufacturing (employment down 2.9%), retail (down 5.4%) and transportation and storage (down 6.8%). This suggests a realignment of the economy towards knowledge intensive services since 2016.

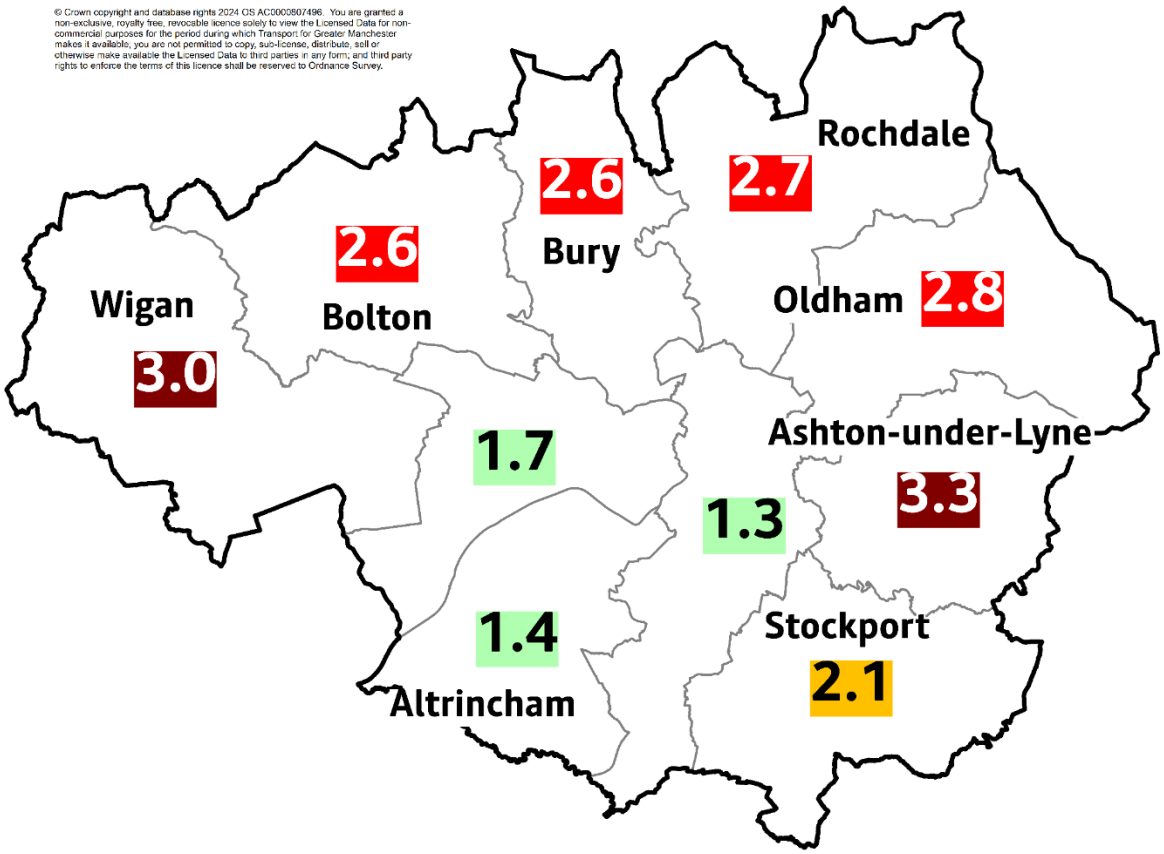
The map below shows the distribution of manufacturing employment across GM. Whilst, as expected, there is still a concentration of jobs in and around urban centres, this is less pronounced than when looking at KIBS jobs. There is less focus on the Manchester/Salford central area, and a more even distribution across the district areas and in out of town locations.

Figure 2.5: Manufacturing Employment in Greater Manchester



Overall, Manchester, Trafford, and Salford (all of which intersect with the Regional Centre) have the highest levels of employment density, with 1.3–1.7 residents per job. Northern boroughs have residents-per-job ratios of 2.6 or higher, suggesting fewer local job opportunities and necessitating higher levels of out-commuting.

Figure 2.6: Residents per job by GM local authority (2023)

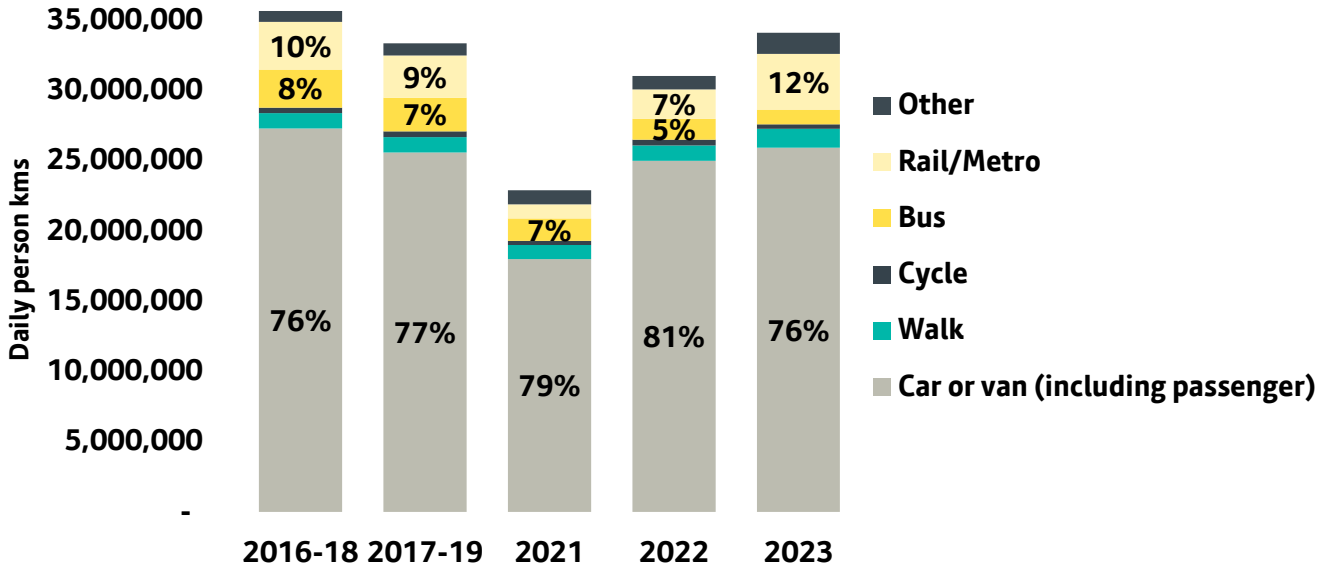


Source: Business Register and Employment Survey (ONS) and Mid-Year population estimates 2023

Key transport trends

Following a decline in travel during the pandemic, total distance travelled by Greater Manchester (GM) residents rebounded by 2023 to 2% above pre-pandemic levels (2017–2019). Car or van travel (including passengers) accounted for 76% of total distance travelled in 2023, which again is back to pre-pandemic levels. Public transport's share also nearly recovered, reaching 15% in 2023.

Figure 2.7: Daily person kms and mode share - GM residents



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

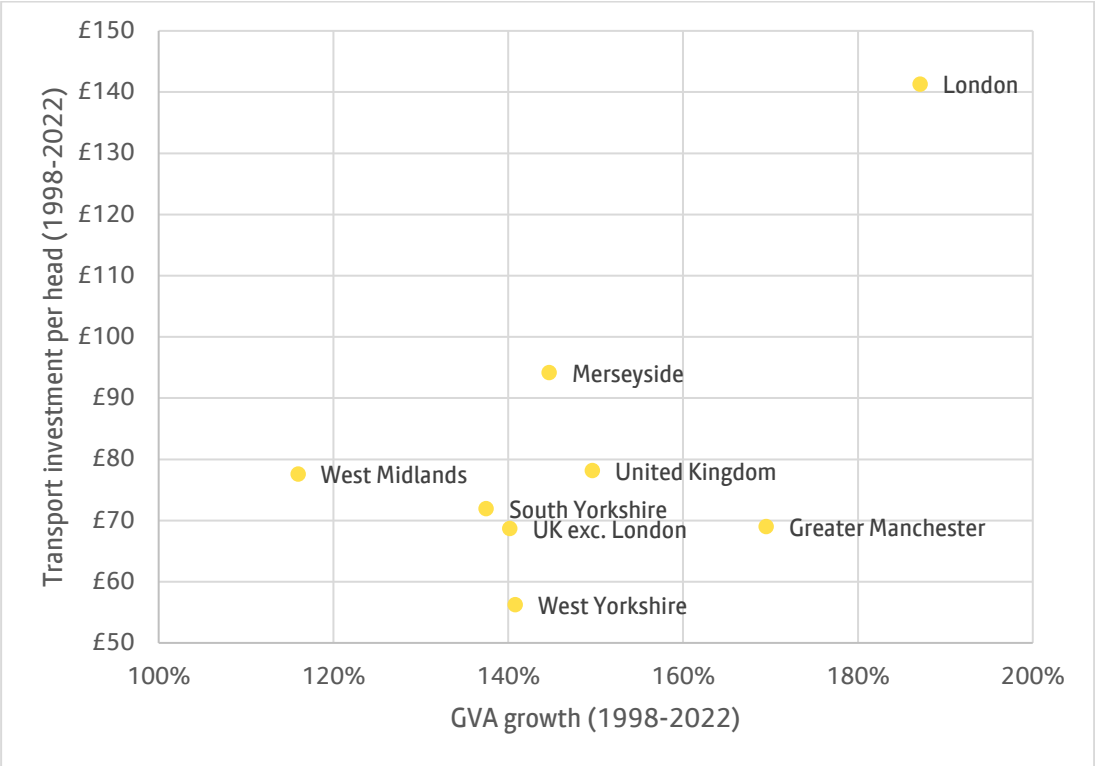
Despite this recovery, the proportion and total distance travelled by car or van has not declined since 2016–18, posing a challenge to achieving GM's 2040 Right Mix targets which aims to shift travel behaviour towards more sustainable modes.

However, both economic output and employment levels have continued to grow even whilst overall levels of travel have been relatively static. The rise in homeworking and digital communication since the pandemic may be a factor in this, accelerating trends in technology adoption and disrupting traditional commuting and business travel patterns.

Transport Investment and Growth in GM over recent decades

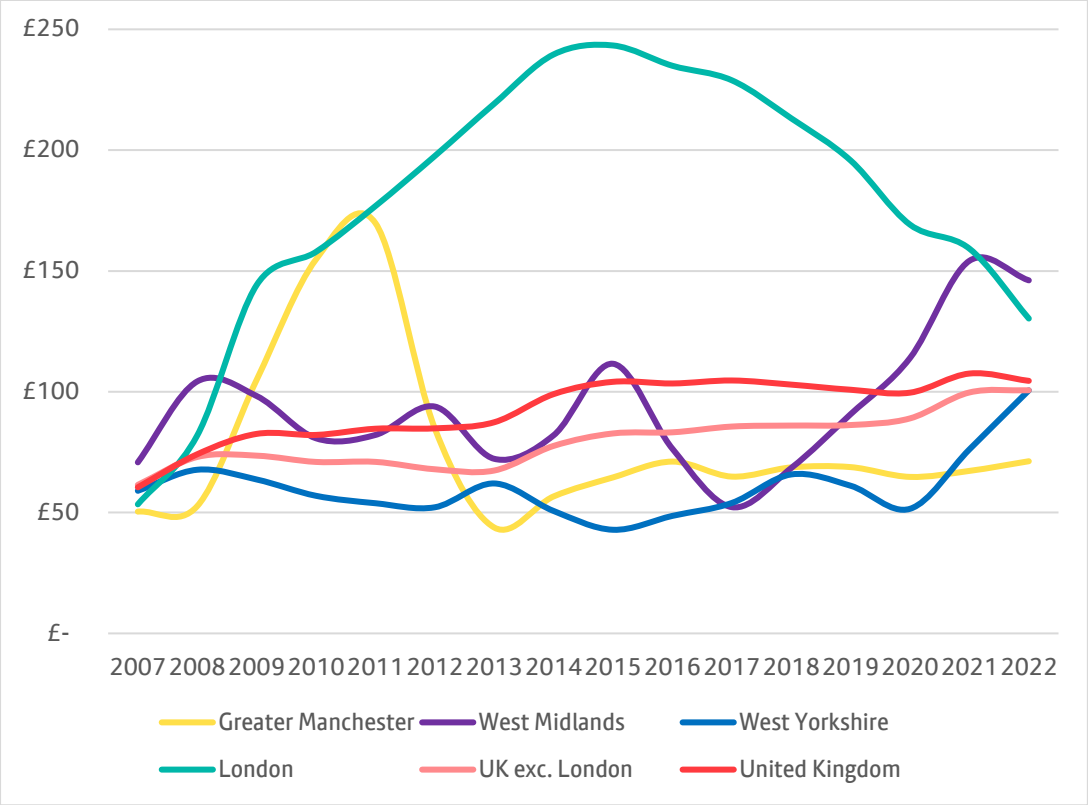
Transport investment is broadly considered to be a key component of economic growth. As the below chart shows, London has seen substantially higher levels of transport investment and of economic growth since 1998, though a causal relationship cannot be established here. The relationship between the two is also less clear at other geographies with London excluded. GM has seen the second lowest levels of transport investment over this period (an average of £69 per head per year), but has seen GVA increase by 170% - second only to the 187% increase in London among areas analysed here.

Figure 2.8: Local government transport investment and economic growth, 1998-2022



Within this period, there have been major fluctuations in transport per head in different areas. GM saw investment spike to above average levels early in the 2010s alongside significant investment in Metrolink. The West Midlands has seen a similar uptick in the early years of the current decade. London has consistently seen levels of transport investment per head exceeding the UK average and that of other major city regions.

Figure 2.9: Local government transport investment per head, 1998-2022



Despite these relatively low levels of transport investment, economic growth in GM has outpaced that of those comparator areas, growing by an average of 4% over the past 25 years. There has been substantial investment in GM's transport infrastructure in this time (including a significant expansion of GM's rapid transit network), but this emphasises that whilst transport investment is a key factor in driving economic growth, it is not sufficient on its own to change growth trajectories.

Over this period, GM has also secured substantial new devolution powers in areas such as skills, innovation and health. These powers, combined with those related to transport, enable GM to take a coordinated approach to investment, aligning transport investment with other priorities to stimulate agglomeration.

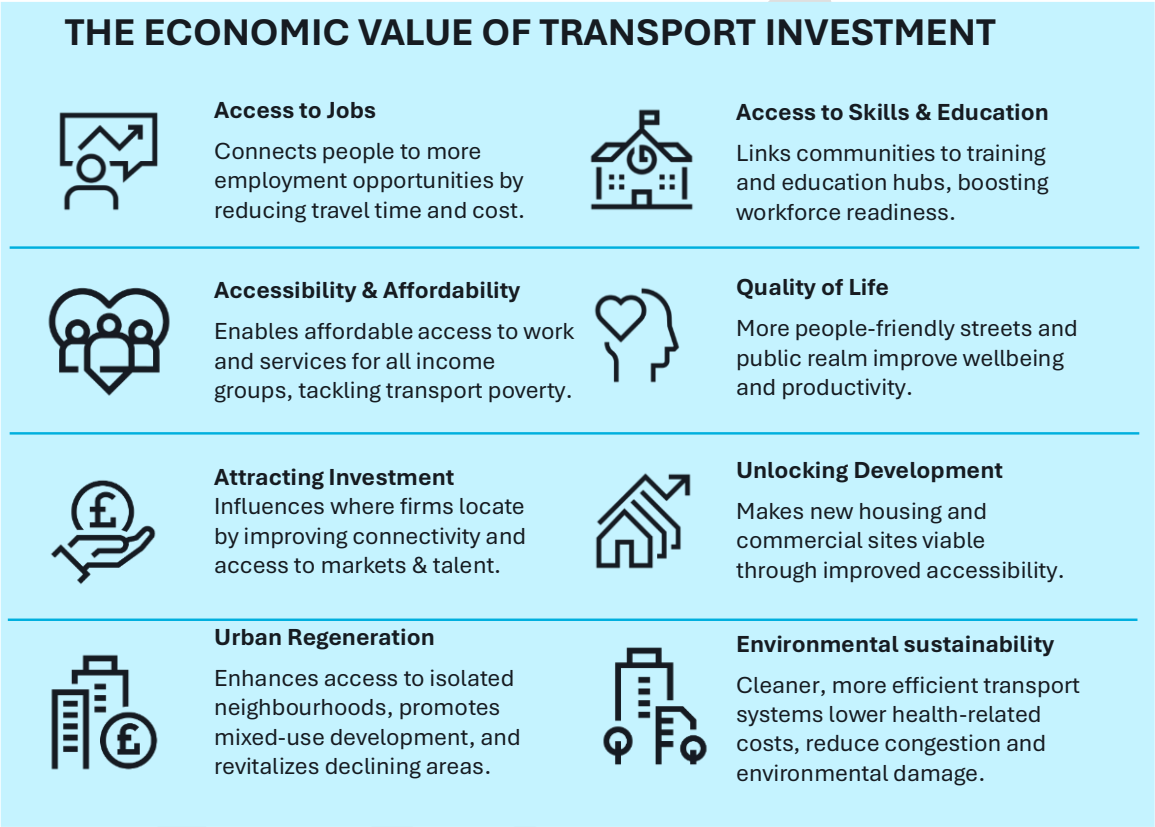
During this period, there has also been a narrowing of spatial inequality across the different sub-regions within Greater Manchester. Between 1997 and 2020, the gap between what an average resident in the least well off parts of GM could expect to earn compared to a resident in the most affluent areas reduced by 15%, and there is some evidence to suggest that the areas of GM that continue to perform less well (such as the North West of the city region) are those which also have lower public transport accessibility levels[8].

[8] Northern Powerhouse Partnership (2023) Greater Manchester's Productivity Resurgence.

3. The Case for Investing in Transport for Growth

Well-planned, well-functioning sustainable transport systems are a fundamental driver of economic growth and productivity, and of wider prosperity and wellbeing. Figure 1 below outlines 8 key ways in which transport (and investment in public transport and active travel in particular) can contribute to these outcomes. These are then explored further in the following chapters, with reference to specific economic challenges and opportunities in Greater Manchester.

Figure 3.1: The economic value of transport infrastructure



Access to jobs

Reliable and efficient transport systems expand labour markets by connecting workers to a broader range of job opportunities and reducing commuting times and costs. This is especially important for lower-income residents who have limited access to private vehicles. Affordable and diverse transport options—like integrated rapid transit and bus networks and active travel—help overcome financial barriers to employment, education, and services. Economic inclusion is vital for productivity. In most OECD countries, productivity tends to increase with city size. This trend is less evident in the UK, suggesting wider challenges such as transport infrastructure and housing markets are preventing the full benefit of agglomeration effects from being realised.

Access to skills & education

Transport is also vital for connecting people to education and skills training, which are often concentrated in city centres or satellite campuses. Reliable links enable a more skilled workforce, enhancing regional competitiveness and productivity. With further education institutions increasingly consolidating into larger, specialised campuses, students often need to travel greater distances to attend[9.] Research by the Urban Transport Group highlights that affordable, dependable bus networks across city regions expand student choices, allowing decisions based on course quality rather than transport constraints. When regional skills strategies depend on multiple specialist centres, excellent public transport is essential to ensure equitable access to education and training.

Attracting investment

Transport infrastructure is a significant factor influencing firms' location decisions, with 60% of UK firms considering transport infrastructure as a major factor in their location decisions[10]. Integrated, reliable transport reduces business costs, improves supply chains, and broadens access to skilled workers. Effective transport encourages business clustering and agglomeration, which facilitates knowledge sharing and economies of scale, boosting productivity. It is crucial that transport infrastructure services are reliable and well-maintained so investment in existing, ageing infrastructure will often be as important to economic performance and attracting and retaining businesses as investing in new infrastructure. This is even more important as extreme weather events become more frequent and have the potential to cause major disruption to existing transport networks.

It also unlocks new development sites for housing, commercial, and industrial uses. New development sites require transport connections to be operational from day one to connect labour markets and supply chains effectively. This includes reliable highway access for logistics and business travel, alongside public transport options aligned with business hours and shift patterns, and safe walking, wheeling and cycling infrastructure.

Urban Regeneration

Transport investment plays a key role in supporting town regeneration by improving accessibility and making towns more attractive places to live, work, and invest. Enhanced transport links connect towns more effectively to surrounding areas, allowing residents easier access to jobs, education, and services. Transport

[9] Urban Transport Group (2018). How transport can help towns thrive.

[10] British Chambers of Commerce. (2008), The Congestion Question: Business Transport Survey, London

improvements can also unlock previously underused or brownfield sites, enabling new housing, retail, and commercial developments that revitalise declining areas.

Unlocking development

Well-planned transport investment plays a critical role in unlocking and de-risking sustainable development. However, transport investment alone is not sufficient to achieve inclusive and sustainable new homes and jobs – it must be part of a wider strategy to optimise access for everyone (as advocated by the "triple access planning" framework[11]). This should include careful site selection and master planning, plus investment in digital connectivity; alongside enhancements to public and active travel connections, to minimise people's need to travel long distances or to be dependent on private cars to reach key services and activities.

In turn this can increase land values, attracting further private investment and driving commercial investment. This is demonstrated by in TfGM's evaluation of Metrolink Phase 3[12], which found a 6.3% uplift in house prices in areas within 1km of a new Metrolink station, and a 6.5% increase in commercial rents (though the latter was not considered to prove causation over correlation). City regions often deploy approaches linked to increases in the future value of the land to be developed as a mechanism for funding early-stage development. A business rates supplement was applied in London to fund Crossrail, whilst Copenhagen has deployed similar approaches to fund the development of a Metro system.

Accessibility & Affordability

Sustainable transport plays a crucial role in enabling inclusive growth and helping to tackle transport poverty by improving access to employment, education, and healthcare. This is particularly crucial for low-income communities which often have lower levels of car ownership, making accessing jobs and services a challenge, and potentially exacerbating social exclusion[13]. Affordable public transport and investment in active travel can also support healthier, safer and more inclusive neighbourhoods.

Quality of Life

Cleaner, quieter streets and high-quality public spaces make cities more attractive to live in. Places with good public and active transport are more likely to attract new residents, workers and investors — and support higher property values and local tax revenues. Conversely, urban areas which are poorly served by sustainable transport modes are often dominated by traffic and congestion, which negatively impacts

[11] Lyons et al (2024) Triple Access Planning for Uncertain Futures – A Handbook for Practitioners (Summary Version)
[12]TfGM (2021) Metrolink Phase 3 - Monitoring and Evaluation Second Report
[13] TfN (2022) Transport-related social exclusion in the North of England

people's quality of life and mental and physical health, as well as undermining economic performance.

Environmental Sustainability

Poor air quality costs the UK economy an estimated £20 billion a year in health impacts, according to the Royal College of Physicians[14]. Pollution-related illnesses — such as respiratory and cardiovascular diseases — reduce people's ability to work and increase NHS costs. Investment in clean public transport, cycling, and walking reduces road traffic emissions, improving air quality and cutting sickness absence. The GM Clean Air Plan[15] highlights that improving air quality in Greater Manchester alone could prevent up to 1,200 premature deaths each year, boosting the city-region's workforce health and productivity.

Investing in low-carbon transport is critical for meeting the UK's net zero targets and avoiding the economic costs of climate change. Local investment in electric buses, trams, cycling infrastructure, and rail electrification not only reduces emissions but also supports new industries — such as clean vehicle manufacturing, battery supply chains, and digital mobility services — creating skilled green jobs. The GM Local Industrial Strategy[16] and GM Prosperity Review[17] both emphasise that Greater Manchester's long-term economic competitiveness depends on its ability to lead in clean growth sectors and to invest in an integrated sustainable transport network[18].

These 8 factors are explored further in the following chapters, with specific reference to the issues and opportunities faced by Greater Manchester.

[14] Royal College of Physicians (2025) A breath of fresh air: Responding to the health challenges of modern air pollution
[15] https://cleanairgm.com/clean-air-plan
[16] GMCA (2019) Greater Manchester Local Industrial Strategy
[17] https://www.greatermanchester-ca.gov.uk/what-we-do/economy/greater-manchester-independent-prosperity-review/ipr-2022-evidence-update/
[18] https://www.greatermanchester-ca.gov.uk/media/6719/gmipr-evidence-update-transport.pdf

4. How Transport can Enable GM's Strategic Sector Economic Priorities

This section sets out Greater Manchester's sector specific growth priorities and considers the crucial role transport will play in unlocking these opportunities.

Recent economic performance in the UK is, on average, characterised by low productivity growth and entrenched regional imbalances. If the UK is to make progress against the Government's growth mission, all major city regions must collectively and consistently play a larger role in driving national economic performance. Transport investment has long been recognised as a key strategic lever in unlocking the economic potential of cities by enabling agglomeration economies (through reduced travel times and costs, expanded labour markets and improved business-to-business connectivity); unlocking housing growth and employment growth; and enabling increased density and accessibility of cities to boost productivity especially in knowledge-intensive sectors[19].

London's success has been underpinned by its extensive and integrated transport system, which has enabled a large, cohesive labour market and supported dense, high-quality urban development20. In contrast, GM and other regional cities have inherited fragmented and underdeveloped transport networks[21]. This is why GM has emphasised investing in its public transport and active travel networks, through development of the Bee Network. This investment has played a key role in GM becoming the fastest growing city region in the UK (annual economic growth in GM is forecast at 4.3%, compared to the UK national average of 3.6%) and is helping to attract more foreign direct investment than any other UK region[2223].

Several strategic priorities have been identified for driving growth in Greater Manchester. Specifically, GM has five established employment "Frontier Sectors" which reflect GM's unique strengths and opportunities for future growth. Each of these Frontier Sectors will require bespoke support to fully realise their potential, reflecting the type and nature of activity which will drive growth, the physical location in which this will occur and the time horizons over which benefits will be realised. The below describes the frontier sectors and considers how transport could either enable or constrain their growth potential.

[19] National Infrastructure Commission (2021) Urban Capacity Report
[20] National Infrastructure Commission (2016) Transport for a World City
[21] Centre for Cities (2021) Measuring up: Comparing public transport in the UK and Europe's biggest cities
[22] https://greatermanchester-ca.gov.uk/news/greater-manchester-sets-out-trailblazing-plan-to-kickstart-a-new-decade-of-growth/
[23] https://ailproperty.com/news/why-manchester-is-the-uks-most-dynamic-growth-city-in-2025

Low Carbon

GM is home to the largest low carbon sector outside London and the South East, employing around 59,000 full-time equivalents (FTEs) across over 3,000 businesses. GM has key strengths and growth opportunities in building technologies, low carbon consultancy, waste and recycling, and low carbon energy generation. Within GM there are particular opportunities at Trafford Energy Park, which hosts a number of innovative energy demonstrator projects including in hydrogen and battery technologies.

An integrated transport system will have a direct impact on GM's low carbon ambitions. The sector's success depends on the continued development of sustainable transport infrastructure and vehicles, including increasing electrification of public transport. An integrated approach to placemaking, which gives people good access to essential local services within close proximity of where they live, and optimises digital access to opportunities to reduce the need to travel (in line with "triple access planning" principles[24]), as well as supporting low-carbon homes and jobs (including retrofitting, and low carbon energy generation and distribution) will be required.

Advanced Materials & Advanced Manufacturing

This sector is anchored by GM's world leading research strengths in graphene and aligned industrial expertise in a range of disciplines including coating processes, precision machining, technical textiles. GM hosts a concentration of innovation assets including the National Graphene Institute and Graphene Engineering Innovation Centre at the University of Manchester, and the Advanced Machinery and Productivity Institute sits at the heart of the Atom Valley Mayoral Development Zone in the north east of the city region.

Atom Valley has the potential to create 20,000 jobs across 1.6million m^2 of employment space, close to the M62 and benefiting communities in Rochdale, Oldham and Bury, amongst others. To fully realise this potential as the focal point for the commercialisation of GM's innovation in advanced materials, Atom Valley will require excellent connectivity to the sector's research institutions, positioning it as a natural location for spinouts and other innovative firms to grow and scale. This may require early intervention to provide confidence that the transport infrastructure is in place to attract such firms and to ensure that site masterplans are designed to make them easy to access and move around by sustainable modes. Transport is also a critical enabler for the sector in terms of supply chain logistics. Efficient freight and connectivity infrastructure are essential to support the movement of goods and

[24] https://www.tapforuncertainty.eu/

people across innovation hubs and manufacturing sites, both across the city region and beyond.

Health Innovation and Life Sciences

GM's health innovation sector is built on a strong ecosystem of academic institutions, NHS organisations, and translational research assets. Strategic priorities include leveraging health and care data, supporting high-growth sub-sectors (biopharma, medtech, optics), and aligning education with sector needs. Key institutions include hospital assets such as the Christie, the Pankhurst Institute, and the UK Biobank. The city region's universities all have distinct strengths in health and life sciences.

Within GM, this sector is geographically concentrated along the Oxford Road corridor, Manchester city centre, Altrincham, and Stockport. This forms part of a wider regional cluster across the North West, which is deeply intertwined in terms of both labour markets and knowledge exchange with places such as Alderley Park and Daresbury in Cheshire, and industry in Liverpool City Region, Lancashire, and South Cumbria.

Good transport and digital connectivity is vital for enabling collaboration across this distributed network of institutions and businesses. In particular, reliable and accessible public transport which provides good connectivity between sites, supports workforce mobility, patient access, and inter-institutional collaboration will be essential.

AI, Cyber & Tech

GM is recognised as one of Europe's fastest-growing tech clusters, with strengths in cybersecurity, AI, fintech, and e-commerce. The region hosts major firms such as Cisco, Amazon, and TalkTalk, alongside a vibrant ecosystem of micro-enterprises and SMEs, such as Dukinfield-based telecommunications specialist Red Rock. Research and innovation are driven by institutions like the Turing Innovation Catalyst and the Centre for Digital Trust and Society.

The sector is heavily concentrated in Manchester's Central Growth Cluster, with smaller hubs in Trafford and Salford. This forms part of the North West Cyber Corridor, drawing in GCHQ and the National Centre for Cyber Security and strengths across Lancashire. The sector is enabled by excellent digital connectivity but still requires physical access to a broad talent pool of highly skilled workers drawn from across GM and beyond.

Creative & Media

GM is home to Europe's largest purpose-built digital hub – Media City UK in Salford – which is home to major institutions such as the BBC and ITV, as well as start ups and

scale ups which drive exceptional growth in the sector. TV and broadcasting has been among the fastest growing industries in GM over the past decade and now employs more than 8,000 people. The city region is also renowned for its strengths in performing arts, and music in particular spanning all genres and including one of the UK's leading orchestras, the Halle Orchestra. New venues such as Aviva Studios and CoOp Live continue to expand the GM's cultural offer.

Beyond this, digital technology is reshaping industries such as advertising and marketing in which GM has traditional strengths, and is enabling new ones such as immersive technology, with a growing cluster in GM particularly around Media City.

5. A People and Place Based Approach to Developing GM's Transport Network

The Transport Strategy for Greater Manchester 2050 adopts a place-based approach to determining transport priorities. This considers the needs of different place and journey types aligned to six different categories:

In this section, we consider the economic growth aspects of each of these place and connectivity types and how carefully focused transport improvements can help to enable thriving local and regional economies.

Connected Neighbourhoods

There is significant evidence to demonstrate that compact neighbourhoods, with good walking and cycling access to local facilities are more desirable to live in, attracting knowledge workers to live in them, and supporting a thriving local economy. This is reinforced by a range of UK and international evidence. [25][26][27][28]

An extensive literature review by the RTPI in 2018 highlighted research that more compact settlement patterns, which reduce the distances between homes, jobs and services help to support more economically productive places"[29]. The report emphasises the importance of good land use planning in shaping travel patterns and people's ability to access jobs and other opportunities without needing a car, leading

[25] TfL Economic benefits of walking and cycling (multiple reports)
[26] US Department of Transportation Economic Benefits of Sustainable Streets
[27] UN (2013) Streets as Public Spaces and Drivers of Urban Prosperity
[28] LGiU (2025) One step beyond: low traffic neighbourhoods as a catalyst for community change
[29] RTPI (2018) Settlement Patterns, Urban Form & Sustainability: An Evidence Review.

to higher levels of economic productivity and more efficient use of transport infrastructure and services. It also explores how more compact, mixed use and public transport friendly neighbourhoods can enable greater economic participation and social interaction, as well as higher levels of physical activity and reduced transport emissions.

There is also evidence that neighbourhoods with good sustainable transport access have a positive impact on housing markets[30][31]. Nationwide's house price index research[32], showed that properties located within walking distance of high-quality public transport services generally attract higher house prices. This is particularly stark in London, but is also seen in Greater Manchester, where the research highlights that a property located within 500m of a rail station or Metrolink stop attracts a 6.1% price premium (this was even higher – as high as 9% - pre-pandemic).

The design of local neighbourhoods and their streets to allow people with mobility difficulties and other disabilities to access employment opportunities and other key services is crucial to ensure they can participate in the local economy. This is emphasised by research undertaken by the University of Salford on Active Neighbourhoods in Greater Manchester[33] which highlights a range of barriers (particularly to those with mobility impairments) to people walking in their local area (such as cars parked on pavements) and the negative impact that has on their lives and ability to participate in everyday activities.

Reducing road traffic speeds and mitigating dangerous driving in local neighbourhoods can also yield substantial economic benefits[34][35]. High traffic speeds and reckless driving not only pose a safety hazard but also deter residents and visitors from visiting local businesses and social interactions more generally. When streets are perceived as unsafe, pedestrian footfall decreases, adversely affecting retail sales and economic activity. Hence, implementing measures to reduce the negative impact of traffic on neighbourhoods, such as lower speed limits, traffic calming measures, and enhanced pedestrian crossings, can create a safer and more inviting environment. Prioritising the safety and attractiveness of local streets therefore makes a crucial contribution to a vibrant and thriving local economy.

Town Centres

Investing in high-quality town centres and streets that people want to spend time in is beneficial for attracting businesses. When town centres are vibrant and filled with

[30] TfL/Steer (2017) Cycling and the Housing Market
[31] TfGM (2021) Metrolink phase 3 Evaluation
[32] Nationwide (2021) House Price Index: Special Report (Transport special Jun-21 - FINAL.pdf)
[33] University of Salford (2021) Active neighbourhoods in Greater Manchester : summary and recommendations
[34] World Bank Group (2018) The high toll of traffic injuries : unacceptable and preventable
[35] Transport for Wales (2024) Default 20mph speed limit on restricted roads Phase 1 areas

amenities, they become more desirable locations for businesses, supporting increased job opportunities and local economic growth[36][37][38]. Enhancing walking, wheeling, and cycling access to shops has been shown to be particularly good for business. Living Streets' latest research on "The Pedestrian Pound" [39] provides a wide range of UK and international case studies to show that people who walk or wheel spend more money in local centres, with pedestrianised high streets seeing bigger sales, and investments in walking realm delivering an excellent median benefit-to-cost ratio of 3.7.

The Local Government Association has published a range of evidence on how to make high streets more resilient and revitalised, particularly following the Covid-19 pandemic. Its high streets toolkit[40] highlights the importance of sustainable transport to successful high streets, emphasising the importance of creating an "attractive environment for workers, residents and visitors that is free from pollution", which are well served by public transport and walking and cycling, and which have attractive and green streets and spaces. The toolkit highlights a wide range of case studies on strategies local authorities have implemented to create more economically successful town centres.

The Local Government Association has highlighted some examples within Greater Manchester, including Altrincham, in Trafford, which was previously labelled "Britain's biggest ghost town" with the worst shop vacancy rate in the UK in 2010[41]. In addition to major development projects, such as investment in a redeveloped Market Hall, Hospital, Library and Health Centre; investment in transport and streets played a major role. An early intervention was the opening of a £19m new transport interchange in 2014 to provide a new bus, tram, train and taxi gateway to the town centre. Over time, streets have been redesigned to provide much greater priority to people walking, wheeling and cycling, with significant new public realm, landscaping and sustainable urban drainage systems, and a range of measures to reduce the dominance of traffic and space given to cars. Altrincham has seen a 5% year-on-year increase in footfall because of these changes and has seen a major growth in shops, restaurants/bars/cafes, and salons and hairdressers (many of which are independently owned and operated). Altrincham is now regularly featured in national lists of the best places to live[42] and was highlighted as a successful case

[36] Local Government Association (2022) Creating resilient and revitalised high streets in the 'new normal'
[37] TfL (2018) Street Appeal: The value of street improvements
[38] TfL (2017) Healthy Streets: A Business View
[39] Living Streets (2024) The Pedestrian Pound: 3rd Edition
[40] Local Government Association (2021) "Resilient High Streets : Challenges and solutions for creating resilient and revitalised high streets in the "New Normal"
[41] https://www.localgov.co.uk/From-ghost-town-to-go-to-town/45320
[42] https://altrincham.todaynews.co.uk/news/2022/04/08/altrincham-named-one-of-the-best-places-to-live-in-the-uk-for-the-fifth-year-running/

study in High Street UK2020 research into factors that influence vitality and viability[43].

Urban Transport Group has also highlighted the important role of transport in helping towns thrive[44], again emphasising the importance of investment in sustainable transport (including public transport interchanges and more people-friendly streets which enable more walking and cycling) as part of wider packages of measures to revitalise town centres; including bringing more housing back into local centres, and locating new colleges alongside public transport hubs to make them more accessible to young people and to act as anchor institutions to support local enterprises and labour markets.

There is a wide range of evidence highlighting the critical role that sustainable transport infrastructure and services, as part of wider town centre masterplans, play in enhancing the economic performance of town centres. By focusing on creating high-quality, accessible, and well-connected urban environments with good public transport access prioritised over car-dominated environments, towns can foster economic growth, attract businesses and new homes, and improve the overall quality of life for their residents.

[43] MMU, IPM and ESRC (2020) High Street UK 2020: Identifying factors that influence vitality and viability
[44] Urban Transport Group (2018) "How transport can help towns thrive"

London's Town Centre Network – Promoting inclusive growth and a unified direction for city expansion

- The London Plan outlines a strategic approach to town centre development across the city, led by the Mayor. This approach is built around a coordinated planning framework that integrates transport, spatial development, and economic growth. The aim is to promote inclusive growth and ensure a unified direction for the city's expansion.
- At the heart of the strategy is the Town Centre Network, which classifies centres into different categories — international, metropolitan, major, district, neighbourhood, and local centres. Each classification is defined by factors such as size, retail and service provision, connectivity, and employment opportunities. This system allows for tailored development strategies that reflect the specific roles and strengths of different areas.
- The Plan commits the Mayor and boroughs to work collaboratively in developing these town centres with three main objectives: to shift the focus of development beyond central London, encouraging commercial and residential growth; to improve access to a broad range of goods and services through sustainable transport modes such as public transit, walking, and cycling; and to support the strong local identity and sense of place that many Londoners associate with their neighbourhoods.

Relevance to GM:

- Whilst London and GM have very different population levels and densities, they share a polycentric structure, with multiple town centres playing vital roles in their regional economies.
- This approach aligns well with the "people and place" framework in the LTP and reinforces the need for good investment in sustainable transport both within and between GM's town and city centres, aligned to each of their unique characteristics and travel needs.

Travel across the wider city region

Over the past 70 years, growing car ownership has reshaped development patterns, often pushing new homes, jobs, hospitals, and shopping centres, into out-of-town sites where land is cheaper and car access and parking are easier. In turn, this has changed the shape of transport demand and nature of service provision. However, these sites often have poor accessibility by public transport, walking, or cycling, limiting some people's access to jobs, healthcare, and leisure facilities[45]. This can exacerbate transport related social exclusion, which is a major contributor to poverty, poor health and social isolation (as highlighted in TfN's extensive research on this subject[46]). Places where cars are the dominant mode of transport also tend to suffer from high levels of congestion, which acts as a brake on economic growth and competitiveness[47] and can divert investment and activity away from town and city centres.

It will therefore be crucial that those growth locations which are outside of GM's main towns and city centres are designed to optimise access by sustainable modes, and to align with GM's right mix targets[48] [49], to ensure that everyone in GM can benefit from the new jobs and homes they offer, and to avoid their growth potential being constrained by traffic congestion and poor access. Alongside this, it is important to continue to recognise the vital role that town and city centres play in creating a diverse, vibrant economy, identifying opportunities to sustain and grow these locations for example through incentives to attract and retain businesses.

Continuing to develop the Bee Network to serve growth locations (particularly reliable and affordable buses[50]), alongside careful masterplanning of new development to make it conducive to walking, wheeling, cycling and public transport use will be essential[51]. TfGM's evaluation of the Cross-City Bus Package and Busway Programme highlighted that the delivery of the Leigh-Salford-Manchester guided busway has facilitated the delivery of c.2,000 new dwellings within 800m of the route between Leigh and Walkden Road on the A580[52] which now have much better sustainable transport connectivity local centres and to jobs and opportunities in Manchester City Centre.

[45] Local Government Association (2024) How local transport infrastructure influences economic inclusion
[46] Transport for the North (2025) "Transport and social exclusion in 2024.25"
[47] Eddington (2006) The Eddington Transport Study.
[48] RTPI (2018) Settlement Patterns Urban Form and Sustainability
[49] RTPI (2021) The Location of Development 3
[50] IPPR (2025) En route to renewal: Delivering better, greener buses
[51] Sustrans & Create Streets (2024) Stepping off the Road to Nowhere
[52] TfGM (2025) Bus Priority Programme Final Evaluation Report

The Lille-Roubaix sub-region – Transport Investment Driving Post-Industrial Regeneration

- Faced with severe economic decline following deindustrialisation in the 1970s, Roubaix became the focus of an integrated regeneration strategy led by the Lille metropolitan authority.
- A key component of this strategy was the enhancement of transport infrastructure, including the extension of the metro and tram networks from Lille to Roubaix and Tourcoing, alongside the development of Bus Rapid Transit links to neighbouring centres.
- Transport investment played a central role not only in enhancing physical connectivity but also in enabling broader economic and social renewal. By improving access to jobs, services, and cultural amenities, the upgraded network helped redefine the role of peripheral towns like Roubaix within the wider metropolitan economy.
- This approach was underpinned by a strategic compromise: Roubaix and Tourcoing supported Lille's flagship investment in the Euralille high-speed rail hub (linked to the Channel Tunnel), while receiving substantial investment in local transport and housing. This mutual reinforcement fostered a more polycentric urban model, with each area benefiting from improved integration.

Relevance to GM:

- Roubaix's regeneration within the Lille metropolitan area demonstrates how coordinated transport investment can support inter-regional growth and spatial rebalancing after industrial decline.
- Greater Manchester has both a dominant core city and historically industrial satellite towns such as Rochdale, Oldham, and Bolton. The Lille experience highlights how strategic transport investment, coordinated through strong metropolitan governance, can support the regeneration of peripheral towns while maintaining the economic strength of the core.
- For GM, this reinforces the importance of continuing to invest in and integrate its transport network to accommodate new growth and revitalise its places.

Regional Centre

Strong city centres, with higher density residential and employment development supported by investment in high capacity, integrated sustainable transport drives a more productive and inclusive economy and better transport outcomes[53][54][55]

[53] Centre for Cities (2014) Transport essential for growth in cities
[54] TfL/Volterra (2014) Investing in city-regions: the case for long-term investment in transport
[55] Centre for Cities (2022) Mapping the 30-minute city

City centres are particularly important for attracting and growing knowledge-based industries and good public realm, leisure and cultural opportunities are all good for attracting investment.[5657]

Research from the Centre for Cities (2021) highlights the crucial importance of excellent public transport access into city centres to support agglomeration benefits, revealing a direct link between a city's 'effective size'—the share of the population that can access the city centre within 30 minutes by public transport—and economic productivity[58].For example, although Manchester and Rome have similar populations, Rome is 55% more productive, this is partly due to its larger effective size, as many more commuters can travel by public transport into the city centre. Manchester's effective size is closer to that of Dortmund, which has a far smaller population and a narrower productivity gap of just 12% (Centre for Cities, 2021).

Research for the National Infrastructure Commission considered the scale of urban transport capacity required to support post-pandemic growth and recovery of cities over the period to 2055[59]. The report highlighted that transport capacity is estimated to constrain growth in a number of major towns and cities in the UK, with up to c.270,000 city centre jobs at risk, without significant investment in mass transit capacity. Manchester was one of a small number of cities which was identified as being particularly at risk of having its growth curtailed by transport capacity constraints. Demand management measures were also highlighted as having potential to complement investments in public transport to better manage road space, facilitate growth and support wider local objectives. In response to this research, the NIC recommended increasing investment from 40% of public investment in transport in 2025 to 50% by 2030, including a significant increase in investment in public transport in major regional cities (including Manchester).

Alongside investment in major public transport systems, there is also significant evidence on the importance of people-friendly streets in city centres to attract investment, high quality jobs and to support thriving retail and leisure economies[60]. Living Streets' latest "Pedestrian Pound" report showcases the work that Sheffield City Council has done to transform Castlegate in the city centre, with previously heavily trafficked roads being converted into a linear park to provide a safe and attractive route through the area for walking, wheeling and cycling; supporting a 500% increase in biodiversity and flood mitigation measures, as well as creating at least 540 jobs (with more than 1,600 projected in total), and supporting the

[56] British Council for Offices (2017) The Market Cycles: The rise of cycling and its impact on office specification and investment.
[57] ARUP (for DfT) (2022) Realising and accelerating the agglomeration benefits of transport investments: literature review and policy recommendations
[58] Centre for Cities. (2021), Measuring up - Comparing public transport in the UK and Europe's biggest cities.
[59] Steer (for NIC) (2023) Urban Transport Capacity, Demand and Cost
[60] Living Streets (2024) *The* Pedestrian Pound: 3rd Edition

relocation of several businesses to previously vacant office buildings and warehouses in the area.

City-to-City

Strong inter-urban connectivity is vital for Greater Manchester (GM) to realise its full economic potential and play its part in driving national prosperity. In its second National Infrastructure Assessment[61], the National Infrastructure Commission highlighted the importance investing in intra-urban transport in major cities and in reliable and resilient road and rail links between urban areas (particularly in the North and Midlands which have seen lower levels of investment in strategic transport networks) to support economic growth. IPPR has produced several reports that reinforces this, arguing that poor inter-city rail links are limiting economic dynamism and that the North urgently needs investment in rail infrastructure to address these economic constraints[62] [63] to help close the productivity gap between the North and the rest of the UK economy

TfN's Northern Powerhouse Independent Economic Review[64] also highlights that poor connectivity — particularly by rail — is one of the principal barriers holding back Greater Manchester and the wider North. Currently, slow, unreliable rail services constrain the effective functioning of the region's labour market by limiting how far people can reasonably commute for work. This restricts businesses' access to talent and makes it harder for firms to scale and grow. Whilst major rail investments such as the Transpennine Route Upgrade are an important first step in improving rail connectivity between Manchester, Huddersfield, Leeds and York[65]; investment in transformational projects such as Northern Powerhouse Rail, would dramatically improve journey times between major northern cities, unlocking bigger labour pools and boosting productivity through greater knowledge exchange and collaboration.

As highlighted in a recent report commissioned by the Liverpool-Manchester Railway Board[66], good transport links between towns and cities, are critical to boosting productivity, attracting inward investment, and enabling businesses to access wider labour markets and customers. It highlights the particular importance of rail connections between Liverpool and Manchester to connect the city-regions' Investment Zones; as well as acting as a catalyst for delivering new homes and regeneration of towns and brownfield sites across the region.

[61] National Infrastructure Commission (2023) National Infrastructure Assessment 2.
[62] IPPR (2024) State of the North 2024: Charting the course for a decade of renewal
[63] IPPR (2025) On track to prosperity: Great Northern Rail
[64] TfN (2023) The Northern Powerhouse Independent Economic Review: 2023 Update
[65] https://thetrupgrade.co.uk/
[66] Liverpool to Manchester Railway Board (2025) Connecting the North West to drive national prosperity

Freight connectivity is also critical to GM's future success. TfN's *Freight and Logistics Report*[67] provides evidence on the importance of efficient rail freight connections to the competitiveness of GM's manufacturing and logistics sectors. Rail freight reduces road congestion, cuts carbon emissions, and connects GM's ports, airports, and key industrial sites to national and international markets. Without modern, reliable freight rail, businesses face higher transport costs and reduced access to supply chains — undermining growth and resilience.

Interlock – Matching public transport networks to labour markets in Germany

- German city-regions like the Rhine-Ruhr conurbation use integrated, devolved transport networks to support inter-regional labour markets and economic growth. These regions operate under devolved regional control, enabling a coordinated system of inter-city trains, suburban rail (S-Bahn), subways (U-Bahn), trams, and buses—all unified by common ticketing and branding.
- Key to this model is **joint coordination between transport authorities**, providing seamless travel across overlapping areas and expanding job access by connecting cities and rural areas. The Verkehrsverbund Rhein-Ruhr (VRR) serves 7.8 million people with this approach.
- The Rhine-Ruhr Express project, called the "Project of the Century," will add six high-frequency regional lines, improving connectivity between major cities in the Rhine-Ruhr like Cologne, Dortmund, Essen, and Düsseldorf, and strengthening the integrated network.

Relevance to GM:

- This model highlights the benefits of a unified, regionally coordinated system to expand job access and promote balanced growth. For GM, this reinforces the need for seamless connections between rail, tram, and bus services connecting key nodes in a polycentric area, underpinned by unified ticketing and branding — ambitions reflected in projects like the Bee Network and proposed rail reforms under Greater Manchester's devolution deal.

Global connections

Good access to international ports and airports is fundamental to Greater Manchester's competitiveness and its ability to attract investment, trade globally, and generate high-value employment.

Manchester Airport: In the year preceding October 2024, passenger use was the highest on record at over 30.3 million, through 185 destinations, the 3rd busiest airport in the UK.

[67] TfN (2022) Freight_ & Logistics Strategy

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

In addition, Airport City Manchester is one of the UK's largest development projects, aiming to transform the area around the airport into a global business hub for logistics, advanced manufacturing, life sciences, and digital industries. This integrated airport city model strengthens GM's role as a gateway economy — attracting international firms, boosting exports, and supporting high-value sectors.

The GM Prosperity Review[68] emphasises that Manchester Airport's connectivity is vital for local businesses, particularly those in advanced manufacturing, professional services, and life sciences that rely on international clients, fast supply chains, and face-to-face knowledge exchange. Improved surface access to the airport — especially by rail — is highlighted as crucial for maximising its economic impact and ensuring that businesses across GM and the North can fully benefit from its international reach.

Ports and inland waterway freight also play a significant role in driving GM's economic growth. The Manchester Ship Canal and Port Salford provide the North West with unique access to deep-sea shipping via the Port of Liverpool, supporting more sustainable, cost-effective freight transport. According to Transport for the North's Freight and Logistics Strategy, Port Salford is expected to handle up to 3 million tonnes of cargo annually when fully operational, creating over 16,000 jobs and supporting low-carbon logistics by shifting freight from road to rail and water.

Modern, efficient port access helps GM's manufacturers and exporters compete globally by lowering transport costs and enabling just-in-time supply chains. The GM Prosperity Review also highlights the importance of integrated freight hubs like Port Salford in supporting the city-region's logistics, advanced manufacturing, and distribution sectors — all of which are central to GM's plan for sustainable economic growth.

Together, international gateways like Manchester Airport and strategic freight assets like the Ship Canal and Port Salford are critical to ensuring that GM remains an outward-facing, globally competitive city-region. Continued investment in surface access, multimodal freight connectivity, and the integration of port and airport hubs will be essential to deliver sustainable growth, high-quality jobs, and greater resilience in GM's economy.

[68] GMCA (2018) Greater Manchester: Independent Prosperity Review Background Paper

Conclusions

Public investment in transport is essential to create the conditions for private sector growth. However, this requires the right type of investment at the right time to unlock growth and, critically, ensure that the benefits of that growth can be accessed by all parts of society. Aligning transport investment with wider growth-related investments positions GM to maximise growth, and maximise the social impact of that growth.

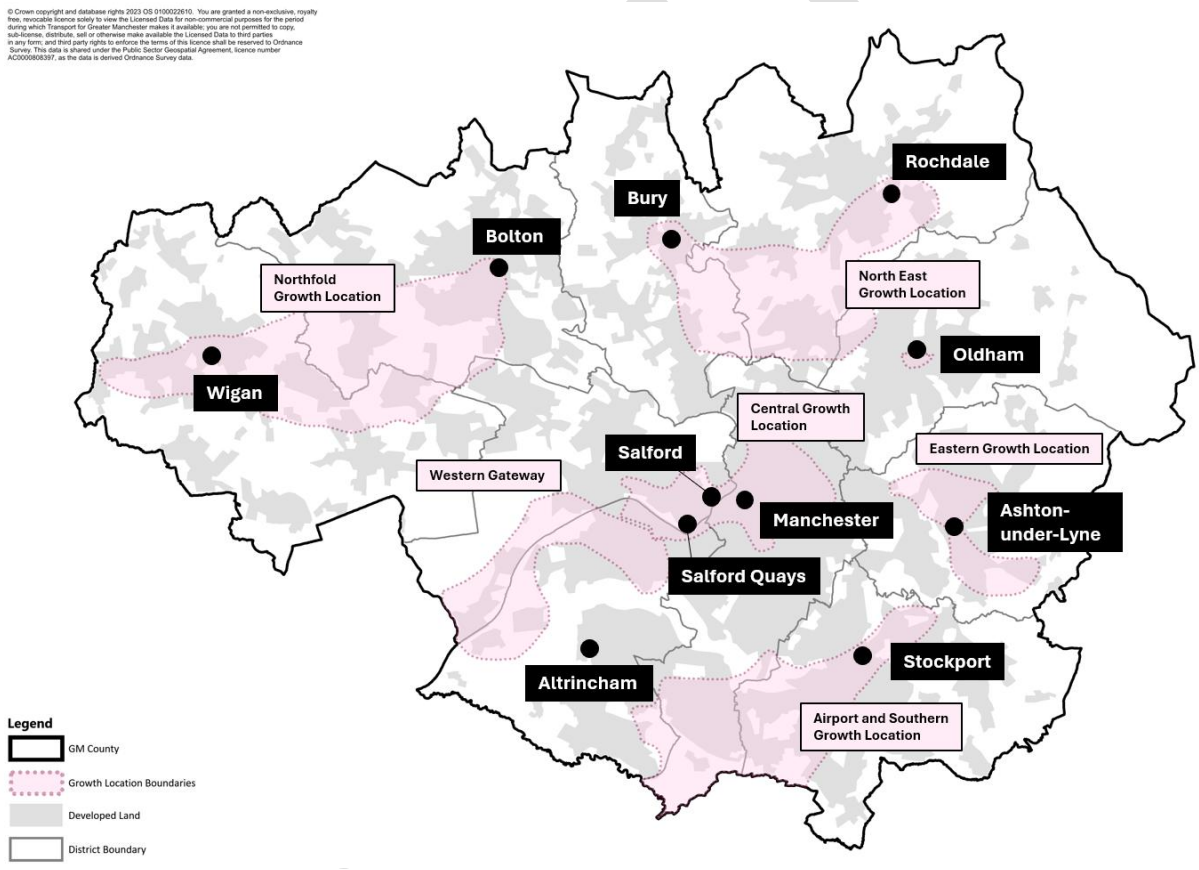
In this context, it is important to consider the routes by which GM's Growth Locations will drive growth and what transport investment is required to unlock that. For example,

- increasing growth in the regional centre requires high frequency mass transit and strong inter-regional connectivity
- Locations primed for advanced manufacturing require excellent access to the strategic road and rail networks, enabling inputs and outputs to be moved efficiently and reliably. Sustainable access to such sites, which are often in out of town locations, is increasingly important to enable workers to access these sites without increasing car trips.
- For both of the above, public transport connectivity with town centres is vital to enable workers to access jobs and training opportunities across the city region, with transport-oriented development in these towns crucial to providing access to employment and stimulating activity in town centres.

These issues are explored more fully in the next chapter in the specific context of GM's growth locations.

6. Transport's role in delivering GM's Growth Locations

GM has identified six Growth Locations which, along with its town and city centres, will act as the focal point for growth. These locations all have distinct opportunities and requirements but appropriate transport investment will be required at each to ensure that they are highly accessible and not only contribute to growth in the region but also support the delivery of GM's Right Mix targets. This will require careful masterplanning, to provide appropriate levels of density and mix of land uses to make new development easy to serve by active and public transport modes of transport; alongside appropriate investment in strategic and local transport connections to allow both people and goods to access the locations in an efficient and sustainable manner.



Central Growth Cluster (Manchester and Salford City Centres)

The Central Growth Location is the economic heart of Greater Manchester, encompassing Manchester and Salford city centres. It is a nationally significant hub for business, innovation, and residential growth. The area is poised for transformational development, with plans for over 2.3 million sqm of office space and around 98,000 new dwellings. Major developments include the Oxford Road corridor, Piccadilly regeneration, Salford's Innovation Triangle, and Victoria North.

As the city centre continues to grow and densify, it will be ever more important to invest in high-capacity public transport provision, as well as transforming streets to provide more space for walking, wheeling and cycling, and buses and trams. This is important to ensure that the city centre is accessible by modes of transport which make most efficient use of the available space, to allow people and goods to be able to access the regional centre and move around it quickly and efficiently without needing a car, and to avoid traffic congestion becoming a limit on growth. High quality public realm and landscaping will be important to ensure the central growth location is attractive to businesses (particularly knowledge-based industries) and new residents and is also resilient to the impacts of climate change with streets designed to cope better with more extreme heat and flooding events (through tree-planting, landscaping and sustainable urban drainage). Resilient infrastructure is critical to a successful economy.

Further investment in rapid transit access into and across the central growth area will be important given the size and economic importance of this growth location as a key productivity driver for GM. This implies ongoing investment in Metrolink/tram-train and local rail capacity and reliability; as well as significant improvements to strategic rail links to other city centres across the North to deliver agglomeration benefits. Bus services will also continue to be important to allow people from surrounding areas to access high-quality job opportunities in the central area. These services will need to be reliable and affordable, requiring investment in bus priority measures, particularly on the most congested corridors into and across the central area. An ongoing programme of investment in streets to provide more space to people walking, wheeling and cycling and to create better quality public realm will also help to support a thriving economy. Car parking is likely to be less critical to the success of the regional centre over time and can potentially be put to more productive uses as the city centres continues to grow.

North-East Growth Corridor (Bury, Rochdale, Oldham)

This is the largest employment-focused growth area in the city-region, spanning Bury, Rochdale, and Oldham. It offers a major opportunity to deliver inclusive economic growth through industrial, warehousing, and office development, alongside significant new housing.

This Growth Location is expected to deliver 1.6 million sqm of industrial/warehousing, 145,000 sqm of office space, and 21,000 new homes.

From a transport perspective, this area will need careful masterplanning to make it as easy as possible to get to and move around by sustainable modes of transport. Improved strategic transport links will be needed to ensure that new industrial areas have good access the area via the strategic road network, particularly to move goods efficiently in and out of the area. Good public transport access to and within the

growth location will also be crucial to ensure local people can benefit from new jobs and opportunities it will offer. Buses are likely to be particularly important given their flexibility and ability to serve a wide range of surrounding communities. Over time, there may be scope to deliver improved rapid transit links as demand for travel grows and reaches a critical mass. Local permeability by active travel into and around the growth location will also help to make it accessible and more attractive to businesses considering locating in the area.

There will also be significant scope for sustainable transport investment to support the growth and regeneration of this area's main town centres (particularly, Bury, Oldham and Rochdale) to make them more attractive places for businesses to locate and to attract new residential development.

Eastern Growth Cluster (Tameside)

Centred on Ashton-under-Lyne and surrounding towns, this location is focused on employment and town centre regeneration. It supports the creation of new jobs and homes through strategic development and infrastructure investment. It includes Ashton – Stalybridge Mayoral Development Corporation, Ashton Moss, and St. Petersfield Digital Creative and Technology Hub and collectively will deliver over 220,000 sqm of industrial / warehousing space.

Ensuring that the area has reliable access to the strategic road network will be important for the movement of goods in and out of the industrial zone. The area is already served by Metrolink and local rail services but there is scope for further investment in reliable and affordable bus services to better connect the area to the regional centre and to neighbouring towns and neighbourhoods.

Good public transport and active travel access into and within the local town centres will be crucial to their economic success, alongside investment in high quality public realm to attract and retain a range of businesses and to support new residential development.

Airport and Southern Growth Corridor (Stockport, Wythenshawe)

Anchored by Manchester Airport and major health assets such as Wythenshawe and Stepping Hill Hospitals, this location is a gateway for international business and innovation. It supports growth in digital health, housing, and employment, with strong links to global markets.

Given this area's importance both as a key driver of the Greater Manchester and North West economy and as a global gateway to the North of England, it is crucial that it is well connected by reliable and resilient strategic rail and road links. To maximise its economic impact, Manchester Airport needs to be well-integrated into the delivery of any future high speed rail services, as well as being better connected

by local rapid transit services to improve access to labour markets and for those flying to/from the airport.

Town Centres in this area (Stockport, Altrincham, and Wythenshawe) have already seen regeneration and improved economic performance over recent years but there is further scope to invest in public transport, active travel and public realm improvements to make them more attractive to potential investors and businesses.

Western Gateway (Trafford, Salford)

This area leverages Greater Manchester's logistics and port connectivity, with a focus on freight, low-carbon energy, and cultural regeneration. It includes major development sites like Port Salford and Trafford Park which have the potential to deliver 19,000 homes and 25,000 jobs.

Reliable and resilient strategic road and rail connections will be crucial to this area's long-term success, particularly in facilitating the movement of freight into and out of the area. Local public transport access will also be very important and whilst it is already well served by Metrolink, there is scope for further investment in high quality bus provision to improve people's access to the job opportunities in the area. As more homes are delivered in the area it will be crucial to ensure that these are designed in a way that enables people to walk, wheel and cycle to local services to make them as liveable and accessible as possible.

Northfold Growth Location (Wigan and Bolton)

This location supports northern competitiveness and has the potential drive inclusive growth through regeneration and strategic development. It includes major town centre projects and health innovation hubs which are expected to deliver 20,000 jobs and 9,000 homes.

This growth location provides an opportunity to deliver highly accessible and well-connected new homes and jobs. Careful masterplanning will be required to ensure that this development comes forward in a sustainable way and to ensure that new residents and employees can access new opportunities by public and active travel. Reliable and high frequency bus services will be needed alongside investment in rapid transit improvements to ensure good access to local town centres (Wigan and Bolton in particular) and into the regional centre. The new east-west highway infrastructure needed to unlock this area's growth potential will need to be designed using streets for all principles to ensure that it provides excellent provision for all road users, including bus passengers and those walking, wheeling and cycling. Transport investment in town centres in this area will also be important to ensure that they fulfil their economic potential, with good public transport provision and high quality town centre streets which create a great environment for people to walk, wheel, cycle and spend time in.

7. Conclusions

Greater Manchester has achieved above trend economic growth over the last decade. This has been enabled through a clear focus on local priorities and opportunities, and long-term coordinated investment in its infrastructure aligned to these priorities.

The development of the new LTP, aligned to the new Greater Manchester Strategy and Places for Everyone, presents an opportunity to ensure the next decade can continue to deliver growth and, crucially, this growth is delivered in a sustainable and equitable way which benefits residents in all parts of GM.

It will be important that GM continues to target investment in transport carefully over the coming decades to help maximise the impact on growth, and its wider social and environmental ambitions. This will require a carefully co-ordinated approach across planning and delivery, with a continued focus on the following key principles and ways of working to maximise success:

- **Vision-led and aligned strategic plans:** A growth-led transport plan for GM must be part of a long-term, integrated strategy that aligns transport with housing, regeneration, and skills development. Rather than responding passively to projected demand, the plan should actively shape the city-region's spatial and economic trajectory. This requires a vision-led, programme-level approach, where multiple interventions work in concert over decades to deliver cumulative impacts. GM has a mature way of working across its ten local authority areas and has well-developed and aligned strategic plans (in particular, the new Greater Manchester Strategy[69], Places for Everyone Development Plan Document, the Local Industrial Strategy[70], and the emerging GM Local Transport Plan), which will help to target and co-ordinate investment to have the greatest impact on growth.
- **People and Place-based Growth Plans** which respond to the specific needs of GM's people and places: GM is a polycentric region with multiple town centres, employment zones, hospitals, educational institutions, and visitor attractions. These generate complex travel patterns for commuting, business, logistics, and leisure that extend well beyond the city centre. Different places will need different types of transport investment to maximise local economic impacts, although continued investment in excellent public transport and active travel will be particularly important. This may require difficult decisions, particularly in urban areas, where finite road space will often need to be reallocated away from private vehicles and towards higher capacity and

[69] GMCA (2025) Greater Manchester Strategy: Together we are Greater Manchester
[70] GMCA (2019) Greater Manchester Local Industrial Strategy

sustainable modes of transport which can carry move people into and around our centres much more efficiently and effectively.

- **Aligning new housing and jobs growth with transport infrastructure:** for example, GM's wider policies to deliver higher density residential development around transport nodes[71] can support higher public transport usage, improve housing availability, and attract skilled workers to GM. New growth locations must be masterplanned in a way which makes them easy to serve by high quality public transport and active travel networks (including mixed land uses and higher density development). This will be crucial to delivering GM's ambitions for a fairer, greener and more prosperous city region.
- **Supported by an Integrated Delivery Pipeline:** The development of an integrated growth pipeline for GM[72] is a crucial step to enabling greater public and private investment in the city region. It provides a clear link between employment growth and housing and neighbourhood development, which in turn provides clear direction for how transport investment can be developed and sequenced to enable this growth.
- **"Right-Mix" targets** to shape a city region which is less dependent on car travel and therefore can grow more rapidly without excessive levels of traffic congestion. By 2040, Greater Manchester aims for 50% of all journeys to be made by walking, cycling, or public transport. This shift—equating to one million additional sustainable trips per day—will support a healthier, greener, and more productive city-region. Achieving the Right Mix will not be easy and will require consistent decision-making on land use planning and transport investment to achieve, alongside strong political support.
- **Investing in Our Bee Network** to attract investment in the city region. Public investment in transport is essential to create the conditions for private sector growth. It addresses market failures, particularly in infrastructure provision, and provides the certainty needed to attract long-term private capital. GM's track record—exemplified by the Greater Manchester Transport Fund, the rapid expansion of the Metrolink network[73], and successful re-franchising of the bus network—demonstrates its capacity to deliver high-impact transport projects that catalyse economic development.
- **Maintaining the Existing Transport Network** to ensure it is resilient and reliable for GM's businesses and residents. Whilst much of the focus of this report has been on the need for investment in new transport infrastructure and services, it will be equally important to ensure that existing road, rail, Metrolink and active travel infrastructure is maintained and managed to a

[71] GMCA (2024) Places for Everyone Joint Development Plan
[72] GMCA (2025) Integrated Pipeline Mapping
[73] TfGM (2021) Metrolink phase 3 Evaluation

high standard so that it provides an excellent level of service for those that rely on it to access jobs and training, goods and markets.