December 2023

Travel in London 2023

Active travel trends

MAYOR OF LONDON

TRANSPORT FOR LONDON

EVERY JOURNEY MATTERS

Travel in London 2023

Active travel trends

2023 update

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Summary of key findings

This report provides an overview of trends in key indicators of active travel in London, focusing on walking and cycling, up to 2023. It looks both at longer term trends and post-pandemic developments with active travel modes, and also reviews trends in sociodemographic participation.

Walking

- There has been a consistent increase in walking-all-the-way trips among London residents, from 0.66 trips per person per day on average in 2017/18 to 0.84 in 2022/23.
- There are some significant differences between socio-demographic groups in the extent to which they walk. London residents' walking trip rates have been increasing among most groups, the only exception being Black residents whose trip rate has remained constant.
- In terms of **gender**, women continue to do more walking trips than men. Among the different **age** groups, those between 25 and 44 years of age have the highest walking trip rates, followed by those in the 5-16 and 45-64 age groups. Walking trip rates have remained fairly constant over time among young adults (17-24) and since the pandemic among people over 65.
- **Ethnicity** shows disparities among groups, with White London residents showing the greatest increase in walking trip rates, of which only 'Other groups' saw a similar increase in walking trip rates over time.
- Similarly in terms of **employment**, part-time workers and non-workers have higher walking trip rates than any other group, although both groups have seen reductions compared to before the pandemic, which may be correlated with changes in travel behaviour since the pandemic.
- Over time, there has been a steady increase in the proportion of walking trips done for leisure, with reductions in all other purposes.
- Pedestrian populations in **central London** fell dramatically during the pandemic but have increased since then. At quarter 3 2023 (July-September), they remain 15 per cent lower than the equivalent quarter before the pandemic. This trend is similar to that seen on the London Underground and reflects both the pandemic impacts on commuting and other agglomerative activities as well as fewer visitors.

Cycling

- Cycling made up 4.5 per cent of trips in London on an average day in 2022, and in 2022/23 up to 23 per cent of London residents reported having cycled at least once in the previous year.
- In 2023, daily **cycle stages** across London increased by 6.3 per cent from 1.19 million in 2022 to 1.26 million, a level of growth not seen in the five years before the pandemic. This corresponds to a 20 per cent increase since 2019.
- Looking at each **area** separately, between 2022 and 2023 there was an increase of 1.7 per cent in daily cycle stages in central London, 8.2 per cent in inner London (where

for the first time the number of stages exceeded 600,000) and 5.5 per cent in outer London.

- Overall, weekday cycling **volume** increased by 2.9 per cent in 2023 from 2022, reaching up to 6.2 million kilometres cycled. This is a 22 per cent increase since 2019. By sampling area, this corresponds to a 1.6 per cent decline in central London, 4.7 per cent increase in inner London and 2.1 per cent increase in outer London.
- Cycling is more prevalent in certain **sociodemographic** groups, with men, people aged 25 to 44, White people and those in part-time employment showing significantly higher trip rates than the other groups in their respective categories (women, people of other ages and work statuses). Interestingly, trip rates by household income are all roughly of the same order of magnitude, with the exception of those in households earning between £75,000 and £100,000, which are slightly lower than the others.
- The proportion of **London residents who cycle** at least once a year has been increasing and was at 23 per cent as of 2022/23. This increase has happened across all sociodemographic groups but at different paces, with some groups (particularly in terms of ethnicity, and notably Asian, Black and Other ethnic groups) showing particularly large increase in recent years. However, despite these positive signs of cycling uptake across the population, there are still representation imbalances and little long-term change in relation to the sociodemographic profile of London residents' population.
- In 2022 the annual demand for **Santander Cycles** increased by five per cent from 2021 (10 per cent since before the pandemic in 2019), which constituted another record year, but recent changes to the service and other factors like competition with private operators of e-bikes and e-scooters, may have impacted demand over the last year.

Active travel

- The Mayor's active travel target is for 70 per cent of London residents to achieve at least 20 minutes of active travel (defined as either walking or cycling) per day by 2041. In 2022/23 the proportion was 38 per cent (even in the context of significant investment this measure has historically been around 40 per cent). The post-pandemic recovery of this indicator is being held back by the ongoing relative shortfall in public transport trips post pandemic, which often involve an active travel component as part of a longer trip by another mode.
- The overall figure of 38 per cent of London residents aged 20 or older achieving at least 20 minutes of active travel per day in 2022/23 varies markedly by different **sociodemographic groups**. There is little difference by gender, with 38 per cent of both men and women achieving the target in 2022/23. Age, however, has a much bigger effect, with a decrease in the proportion of residents meeting the target as age increases. In 2022/23, 41 per cent of residents aged between 20 and 39 met the target. This falls to just 18 per cent of residents aged 80 and over. In terms of ethnicity, 42 per cent of White residents met the target in 2022/23, with only 33 per cent of Black residents and 32 per cent of Asian residents doing so.
- The proportion of London residents aged 20 or older achieving at least 20 minutes of active travel per day also differs across **London areas**, with residents in inner London more likely to achieve it than outer London residents. In 2022/23, more than half of all residents aged 20 and above in Westminster, Kensington & Chelsea, Islington and Hammersmith & Fulham achieved at least 20 minutes of active travel. In contrast, fewer than a quarter of residents of Hillingdon, Barnet and Sutton met the target.

Walking

Walking is the most frequently used form of transport in London. Some 39 per cent of all trips by London residents are wholly on foot, with a further 14.5 million walk stages used to access other modes each day. The difference between trips and stages is that trips are complete one-way movements from an origin to a destination for a given purpose and may include several modes and journey stages (for example cycling to the station, then taking the train and then walking to the final destination), while journey stages are parts of trips by a single mode (in the example above there is a cycling, a train and a walking stage).

The ubiquity of walking and the fact that many walking movements (for example, moving between shops on a high street) do not meet the criteria to be defined as a trip means that it is not possible to obtain good quantitative measures of aggregate walking across London, or to detect small changes or trends in walking. Our London Travel Demand Survey (LTDS), however, does allow walking behaviour to be examined across different sociodemographic groups. The following sections explore this aspect.

Walking by London residents

Overall walking trip rates

Trip rates (the average number of trips made per person on an average day) are a useful indicator of walking demand. Figure 1 shows the long-term trend in walking trip rates by London residents (aged 5 and over) from the LTDS between 2015/16 and 2022/23.

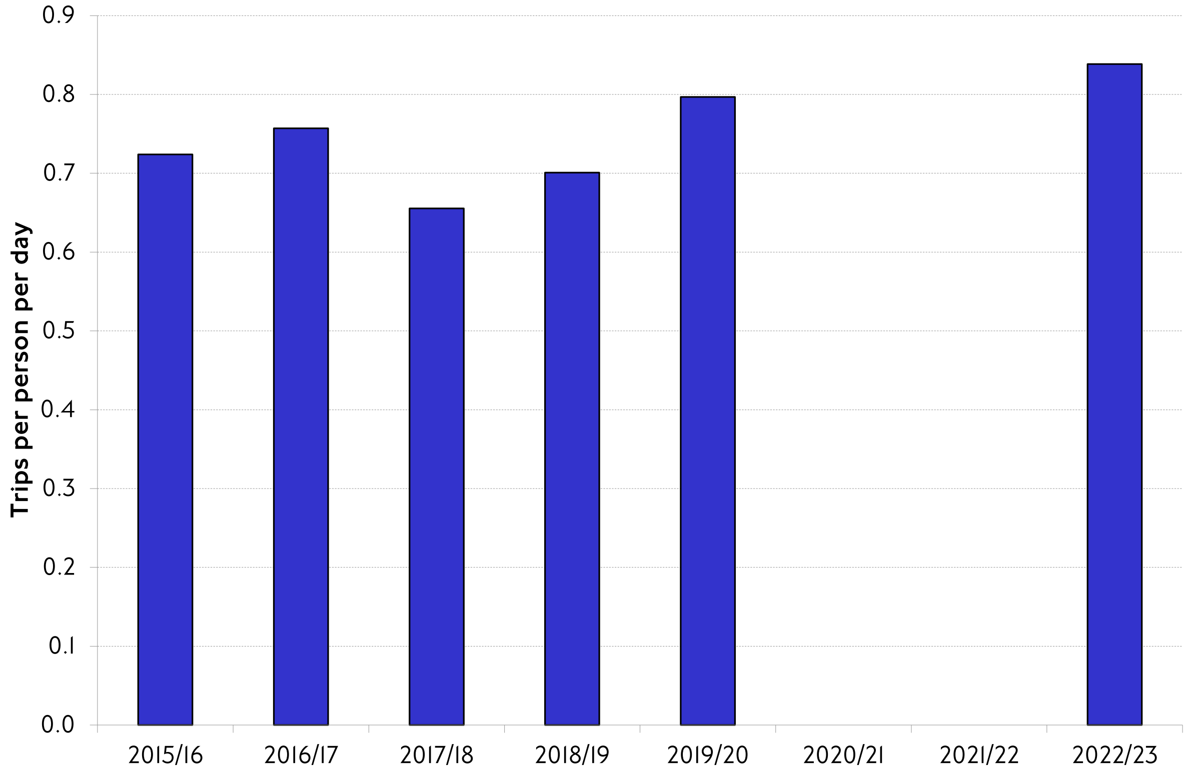
Despite fluctuations between 2015/16 and 2017/18, since 2017/18 there has been a consistent increase in walking trips, from 0.66 trips per person per day on average in 2017/18 to 0.84 in 2022/23, albeit that the growth rate seems to have slowed down since the pandemic.

Walking trip rates by sociodemographic group

Figure 2 shows how walking varies by sociodemographic group.

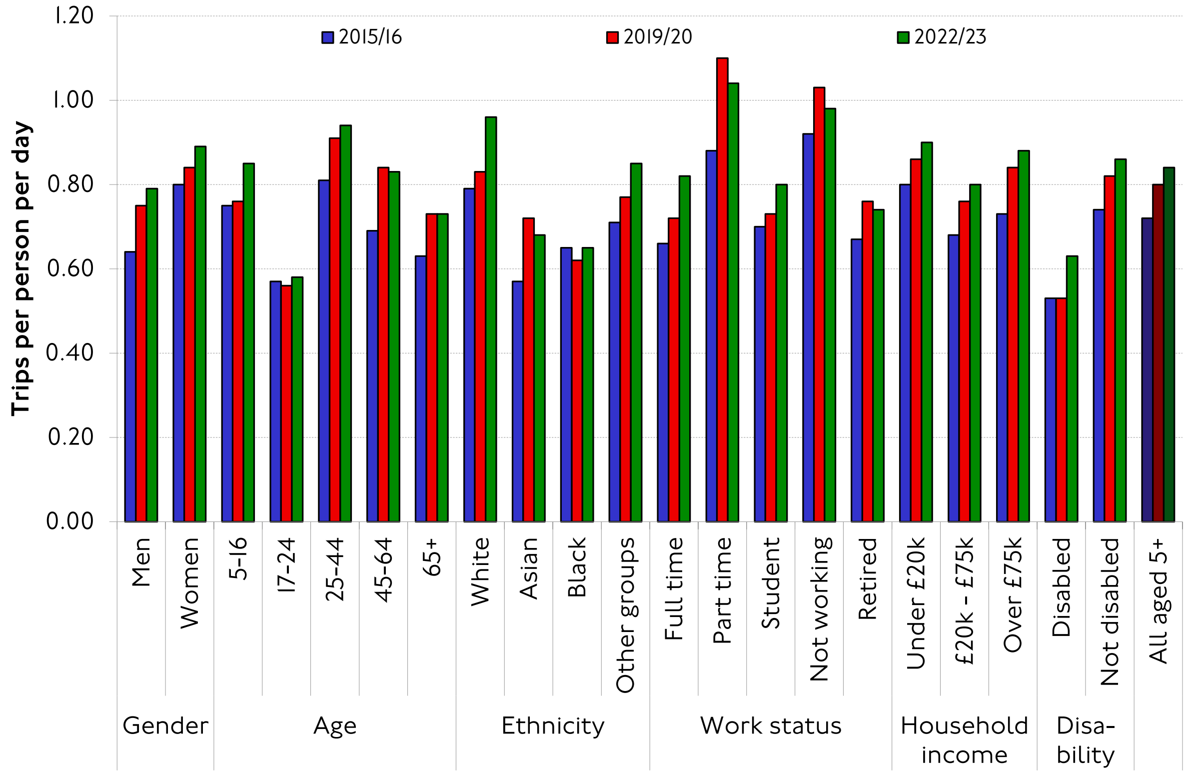
- Over time, London residents' walking trip rates have been increasing among most groups, the only exception being Black London residents whose trip rate has remained constant. Several groups saw fluctuations in 2019/20, still resulting in a longer-term increase. These groups being 17-24, 45-64, Asian, part-time and non-workers and retired, perhaps indicating underlying behaviour change.
- In terms of **gender**, women continue to do more walking trips than men.
- Among the different **age** groups, those between 25 and 44 years of age have the highest walking trip rates, followed by those in the 5-16 and 45-64 groups. Walking trip rates have remained fairly constant over time among young adults (17-24) and since the pandemic among people over 65.
- **Ethnicity** shows disparities among groups, with White London residents showing the greatest increase in walking trip rates, of which only 'Other groups' saw a similar increase in walking trip rates over time.

Figure 1 Walking trip rate among London residents, LTDS, 2015/16-2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the disruptions that the coronavirus pandemic caused on the LTDS on those two years.

Figure 2 Walking trip rates among London residents, by selected sociodemographic groups, LTDS, 2015/16, 2019/20 and 2022/23.



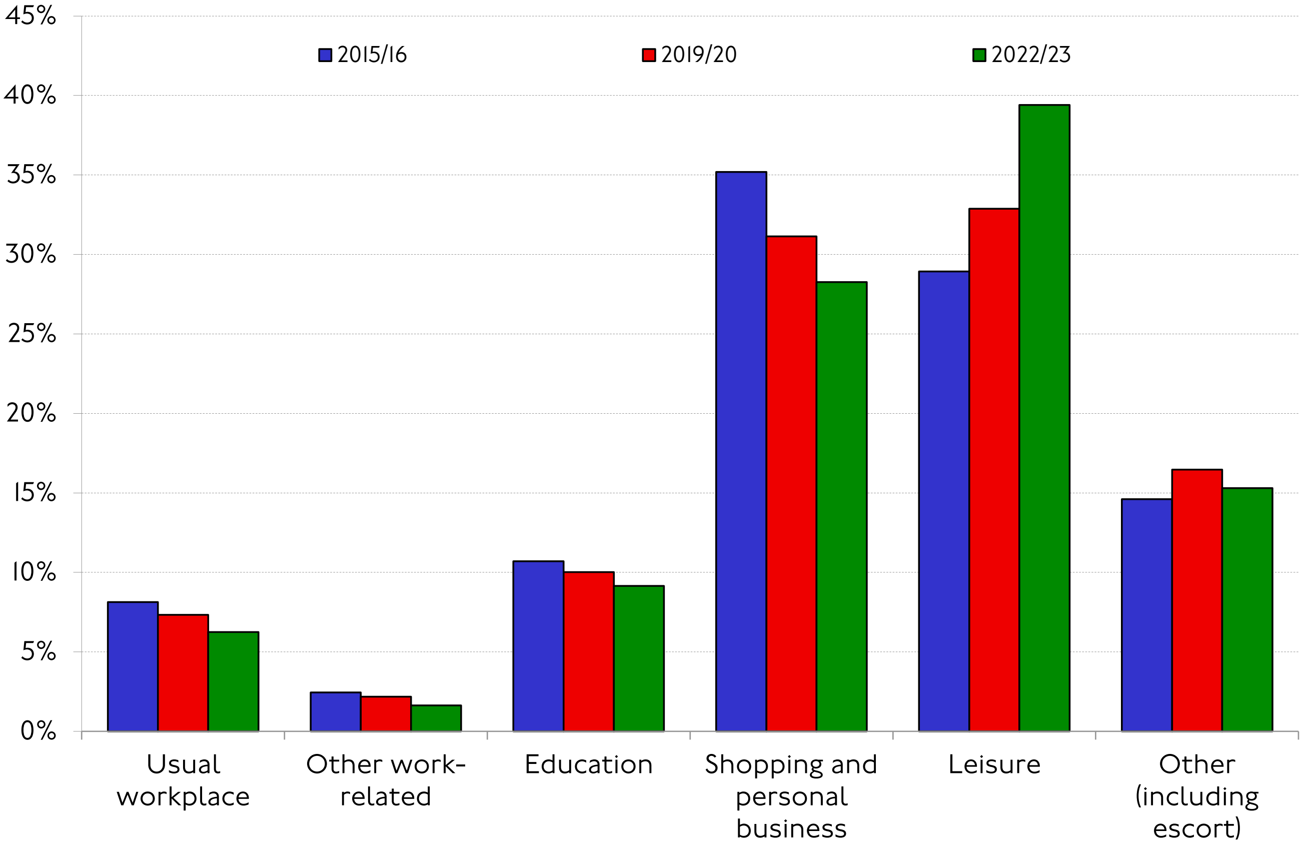
Source: TfL Strategic Analysis, Transport Strategy & Policy.

- Similarly in terms of **employment**, part-time workers and non-workers have higher walking trip rates than any other group, although both groups have seen reductions compared to before the pandemic, which may be correlated with changes in travel behaviour since the pandemic.
- Walking trip rates by **household income** shows a consistent trend of increases across all household incomes. All groups have seen comparable increases with lower income households having a slightly higher walking trip rate since the pandemic, which may reflect a correlation with cost of living pressures.
- Finally, by **disability**, London residents with or without a disability have seen an increase in walking trip rates since the pandemic.

Walking by journey purpose

The distribution of walking trips across different journey purposes is shown in figure 3 for the latest year (2022/23), the pre-pandemic baseline (2019/20) and 2015/16 for reference.

Figure 3 Proportion of London residents' walking trips, by journey purpose, LTDS, 2015/16, 2019/20 and 2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

The main feature is a steady increase over time (particularly since the pandemic) in the proportion of leisure trips, with reductions for all other purposes with the exception of other (including trips accompanying others), which fluctuates around a fairly constant value.

To correctly interpret these results, it is worth stressing that this is based on 'walk-all-the-way' trips. However, there is a lot of walking that takes place in combination with other modes (in that case we speak of walking stages as part of a trip) which may be undertaken for other purposes.

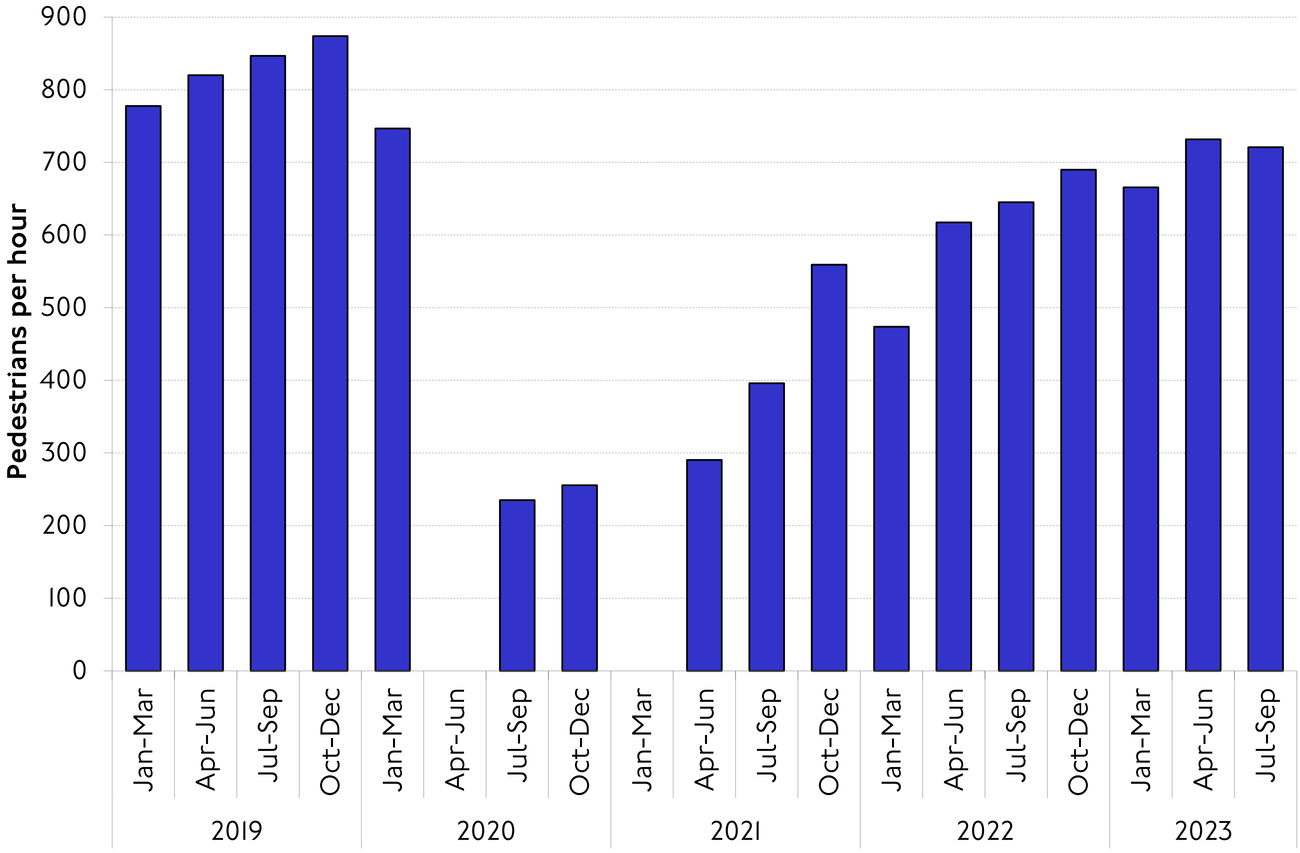
Pedestrian activity in central London

TfL's survey of pedestrian activity (footfall, or pedestrian populations) in central London consists of a comprehensive series of point-based counts, covering some 600 sites in total, according to an efficiently structured sample that affords both spatial and temporal disaggregation. It usually reports quarterly, although restrictions meant that some quarters were not surveyed during the pandemic. Figure 4 clearly shows the impact of the pandemic on footfall in central London.

Pedestrian activity over time

Pedestrian populations in central London have increased since the end of the pandemic and have continued to increase into 2023. However, as at quarter 3 2023, they remain 15 per cent lower than in quarter 3 2019 (pre-pandemic). This trend is similar to that seen on the London Underground and reflects both the immediate pandemic impacts on commuting and other agglomerative activities as well as a lack of visitors, and hints at a potential longer-term reduction in travel to central London.

Figure 4 Average hourly pedestrian flow per site in central London, by quarter, 2019-2023.

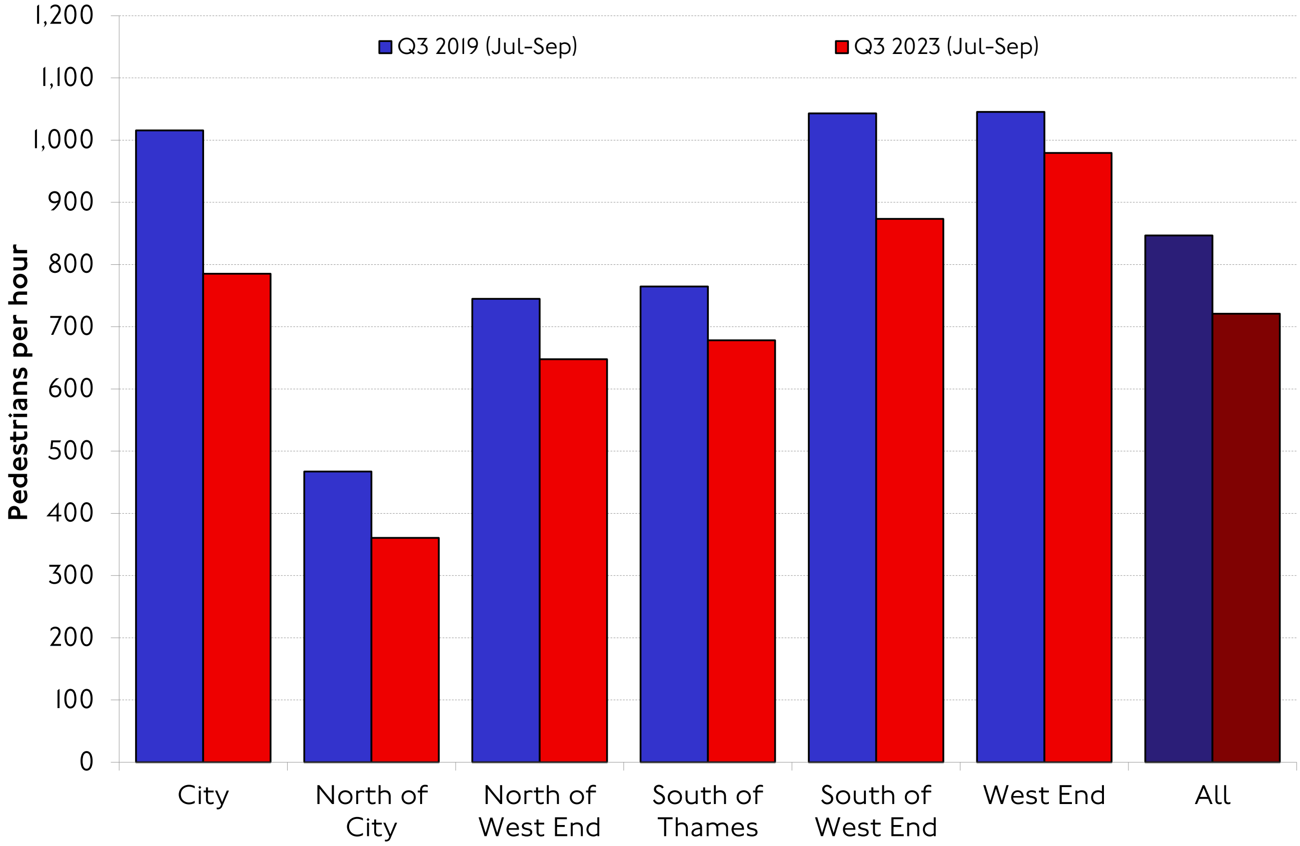


Source: TfL Strategic Analysis, Transport Strategy & Policy.

Pedestrian activity by area

Within this overall reduction of 15 per cent, figure 5 shows how this varies by different areas of central London. The greatest reduction was in the City (23 per cent). Pedestrian flows are now highest in the West End and were just six per cent lower than in 2019. The increase in working from home and hybrid working in this period was clearly impacting the levels of pedestrian activity in the City, which before the pandemic had some of the highest levels of pedestrian activity, comparable to pedestrian flows in the West End.

Figure 5 Average hourly pedestrian flow per site in central London, by area, quarter 3 2019 (Jul-Sep) versus quarter 3 2023 (Jul-Sep).



Source: TfL Strategic Analysis, Transport Strategy & Policy.

Indicative pedestrian activity trends across London

In 2022, TfL's programme of strategic cycle counts was expanded to include, for the first time, pedestrian counts (as well as counts of e-scooters and cargo bikes), which have now been collected in spring 2022 and 2023.

Although the panel of count locations (which covers all areas of London and road types) was originally designed to be representative of the cyclable network (and hence may present biases when extrapolating to other road users, in particular pedestrians), and even though pedestrian activity surveys are only a proxy for 'walking' (see previous section), this data nonetheless provides a potentially useful indicator of change, given that the panel of sites and the counts are consistently repeated using the same methods year on year. Note however that this dataset will never be able to provide absolute values, given the impossibility to weight and expand the sample.

While the opportunities and limitations of this new dataset are still being explored, early headline results are promising and show that between 2022 and 2023 (the only data available for this dataset), pedestrian counts in central London increased by 13 per cent (the equivalent growth shown by the central London bespoke survey for the comparable quarters is 19 per cent, so broadly in line), while in inner and outer London the growth was of seven and three per cent, respectively. Overall, this represents a nine per cent increase in pedestrian flows across the whole of London between 2022 and 2023.

Cycling

Cycling made up 4.5 per cent of trips in London on an average day in 2022, up from 3.6 per cent in 2019. In fact, cycles and motorcycles are the only two modes which were showing higher demand in 2022 than in 2019 before the pandemic. Furthermore, in 2022/23 up to 23 per cent of London residents reported having cycled at least once in the previous year.

While cycling remains a relatively smaller mode in the London context, it has seen strong growth in the last couple of decades, a resurgence since the coronavirus pandemic following a few years of slower growth immediately before, and it is seen as a pivotal mode to achieve the Mayor's aim for 80 per cent of trips in London to be made by active, efficient and sustainable modes.

This section explores cycling trends in terms of levels of demand, the characteristics of cycling journeys and the cycling population, and the delivery of our Cycleway network.

Cycling demand

Consolidated estimates of cycle journeys

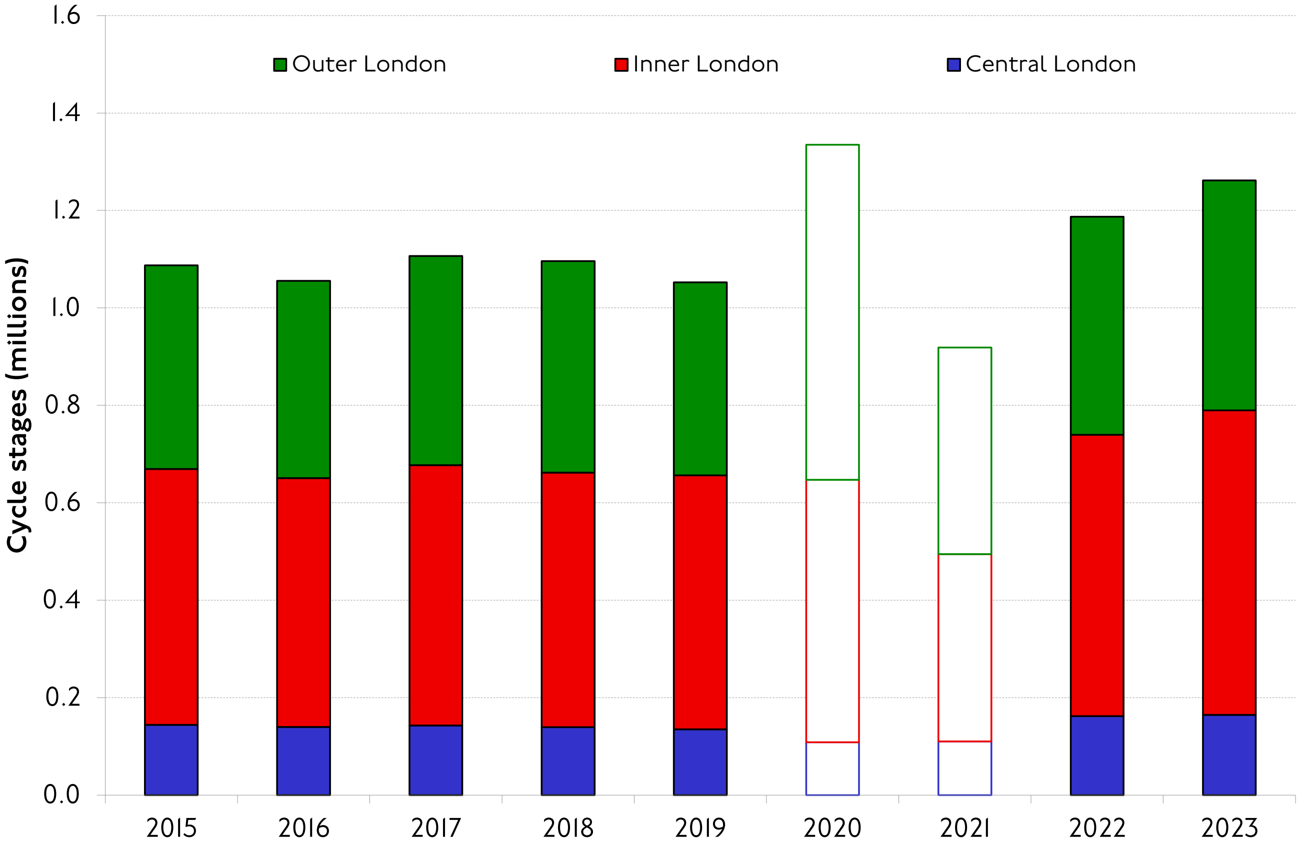
Our best estimate of cycling journeys in London stems from a programme of representative cycle counts dating back to 2015 which covers all road types across central (Congestion Charge zone), inner and outer London. The method to derive cycling demand from these counts was revised and retrospectively applied last year (see Travel in London report 15) and the new target for cycling growth (in terms of cycle journeys or stages) set in the Cycling Action Plan 2 published in June 2023 is now defined and will be monitored according to this new methodology.

Figure 6 shows the trend in daily cycle **stages** by area since 2015. Note that due to the severe disruptions and rapid changes in travel caused by the successive coronavirus pandemic waves in 2020 and 2021 the estimates for these years are highly tentative. However, our best assessment (from multiple sources) of cycling trends during this period is of a very resilient mode and a substantive increase in cycling in 2020 followed by a drop in 2021, although the exact magnitude of these changes is not known.

In 2023, daily cycle stages across London increased by 6.3 per cent from 1.19 million in 2022 to 1.26 million, a level of growth not seen before the pandemic. This corresponds to a 20 per cent increase since 2019, before the pandemic.

Looking at each **area** separately, between 2022 and 2023 there was an increase of 1.7 per cent in daily cycle stages in central London, 8.2 per cent in inner London (where for the first time the number of stages exceeded 600,000) and 5.5 per cent in outer London.

Figure 6 Daily cycle stages in London by area, seven-day week average, 2015-2023.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

It is also possible to look at trends by **day of the week**. Weekdays still account for a higher amount of cycling (with 1.4 million stages on an average weekday) than weekends (with 0.9 million stages on average).

In terms of **trips**, 2023 saw 1.2 million cycle trips, 4.8 per cent more than 2022 (1.1 million). The number of trips increased by 0.3 per cent in central London, 6.7 per cent in inner London and four per cent in outer London over this period.

The relatively higher growth in stages compared to trips suggests that the increase in cycling as part of multi-modal trips (for example, to access public transport or combined with other modes) has increased more than cycling for cycle-all-the-way trips.

Weekday cycling volume

For weekdays only, it is also possible to calculate the total **volume** of cycling in terms of kilometres cycled.

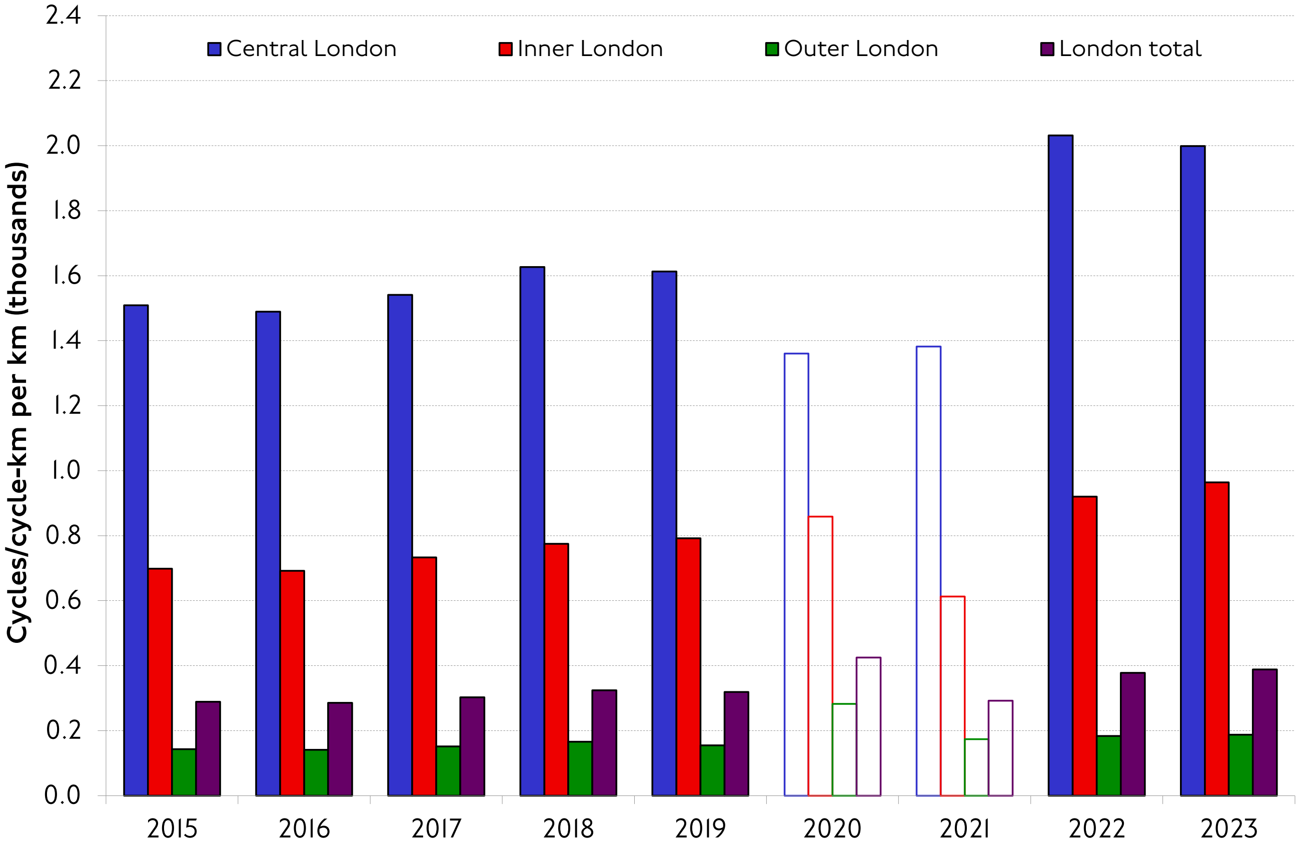
Overall, weekday cycling volume increased by 2.9 per cent in 2023 from 2022, reaching up to 6.2 million kilometres cycled. This is a 22 per cent increase since 2019.

By sampling area, this corresponds to a 1.6 per cent decline in central London, 4.7 per cent increase in inner London and 2.1 per cent increase in outer London. The reason that these percentage changes differ from those stated above is the relatively larger reduction in the average cycle stage length in London (as per our latest London Travel Demand Survey results), and to a much lesser extent in the fact that these volume estimates are for weekdays only while the cycle stages estimates provided above are for a seven-day average.

Weekday cycling 'intensity'

Furthermore, it is insightful to look at daily cycling **'intensity'**, which is expressed in terms of cycling volume (kilometres cycled) per kilometre of cyclable network (this includes the road network and other paths in London where cycling is allowed). Trend results from this metric, which can also be interpreted as the average number of cycles seen on an average road on an average weekday, are shown in figure 7.

Figure 7 Weekday cycling intensity (cycle-km per km) in London, by area, 2015-2023.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

The main features of this graph are:

- Central London, despite having the lowest total cycling volume (as per the previous section), has by far the highest weekday cycling 'intensity', which means that a lot of (relatively shorter) journeys take place within a relatively smaller cyclable network.
- In relative terms, central London's weekday cycling intensity is almost double that of inner London and five times that of outer London.
- Cycling intensity on weekdays has steadily increased in inner and outer London since 2015, but it has sometimes fluctuated in central London, with a small decline in 2023 compared to 2022.
- All in all, this suggests that there is still a lot of scope for weekday cycling levels to increase outside the central area.

Weekday cycling demand profile

Finally, figure 8 shows that the profile of weekday demand has largely returned to the two-peaks distribution seen before the pandemic, albeit with a noticeable post-pandemic legacy of relatively higher proportion of cycling taking place outside the peak periods. Note that the graph depicts relative cycling volume of the weekday total in each year and not absolute volume, which as stated above is higher in 2023 than in 2019.

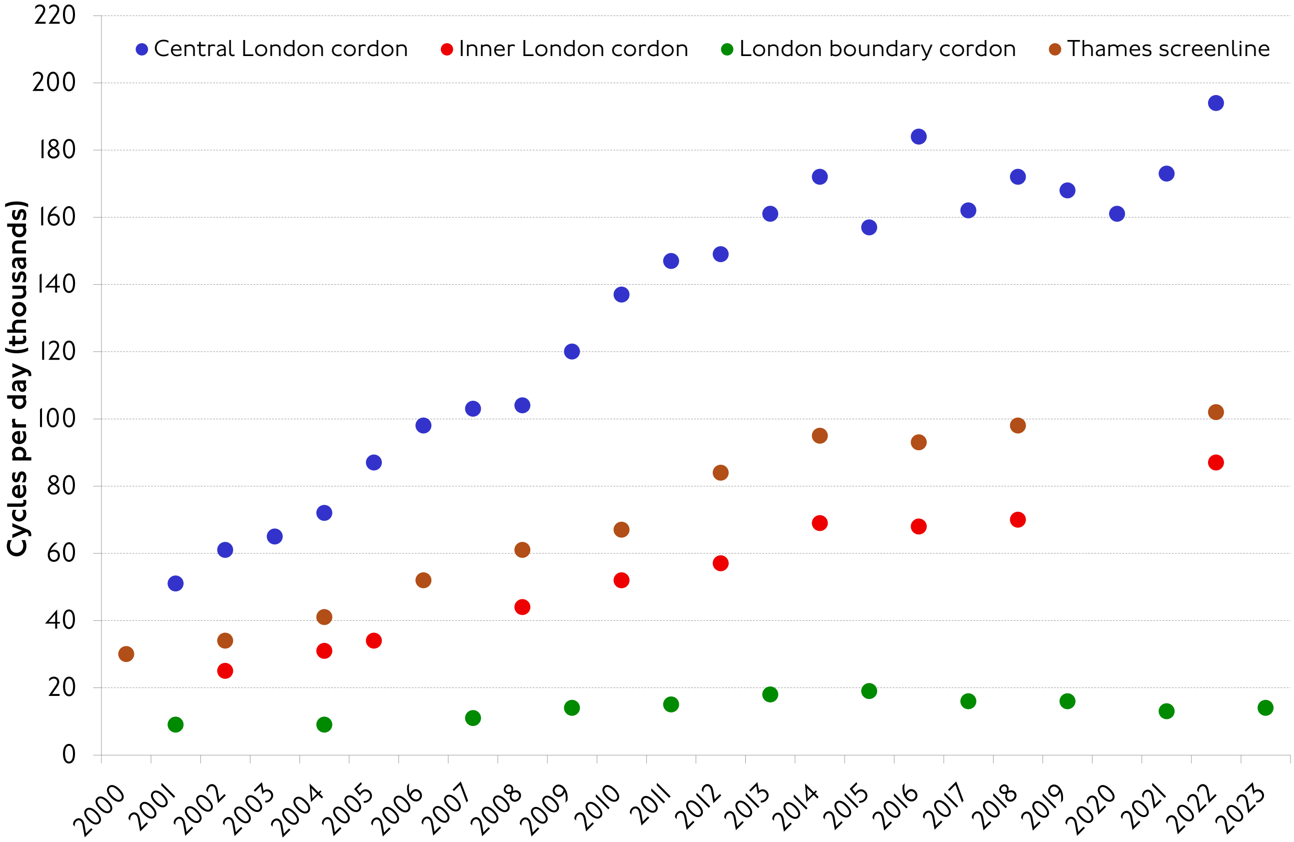
Figure 8 Relative weekday cycling volume profile, 2023 versus 2019.

Source: TfL Strategic Analysis, Transport Strategy & Policy.

Cycling demand in the longer-term context

The long-term trends in cycling demand are illustrated by our counts of cycles crossing each of the central London, inner London and London boundary cordons and the Thames screenline (figure 9). Based on a compromise between strategic importance, rate of change and resources needed to undertake these counts, some of these are done every year (central London cordon) while the rest take place every other year.

Figure 9 Daily cycle flows crossing the strategic cordons, 2000-2023.



Source: TfL Strategic Analysis, Transport Strategy & Policy, based on TfL traffic data.
Note: The 2020 counts at the inner London cordon and the Thames screenline were cancelled due to the pandemic restrictions.

The main feature is strong growth throughout the 2000s and first half of the 2010s (particularly across the central London cordon) followed by a period of stagnation and small decline in the late 2010s. Since the pandemic, where data is available there seems to be growth again at rates comparable to those of the early 2010s.

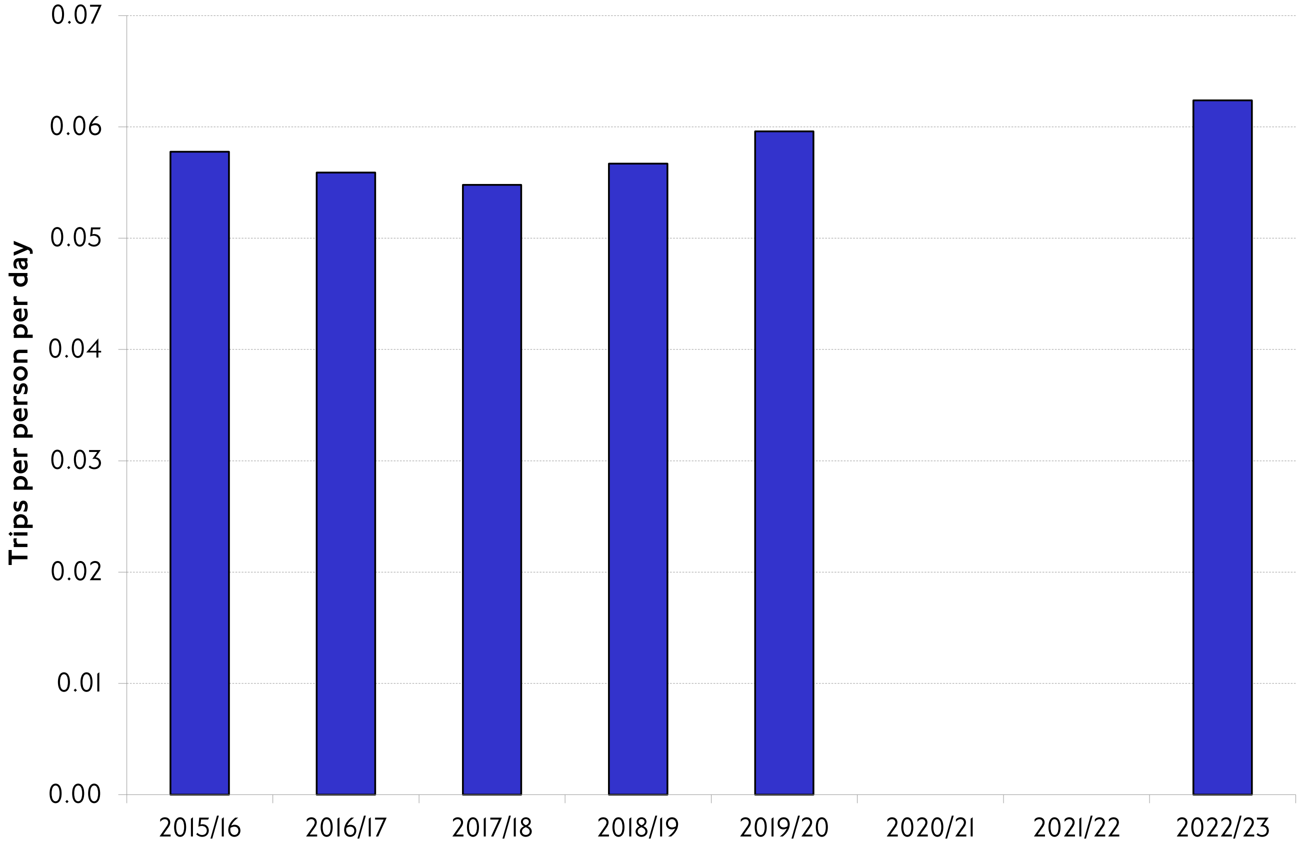
Cycling by London residents

Overall cycling trip rates

A useful way of understanding how much cycling is done by different segments of the population is by looking at their trip rates: the average number of trips made per person on an average day. Our London Travel Demand Survey (LTDS) allows the calculation of trip rates for London residents aged five years and over.

Figure 10 shows the long-term trend in cycling trip rates by London residents between 2015/16 and 2022/23.

Figure 10 Cycling trip rate among London residents, LTDS, 2015/16-2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the disruptions that the coronavirus pandemic caused on the LTDS on those two years.

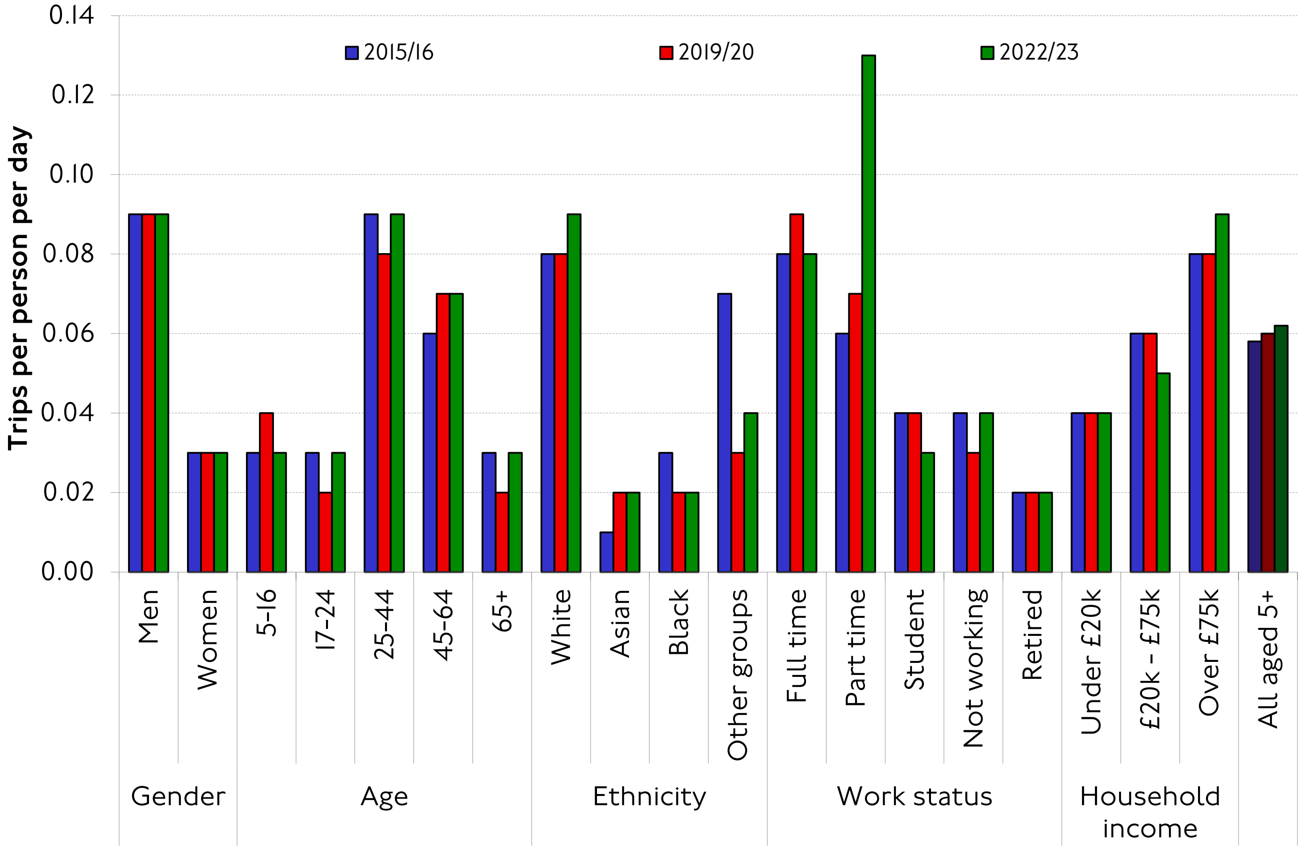
The first thing to note is the small order of magnitude of cycling trip rates (around 0.06 trips per person per day), which reflects mainly the fact that most London residents (77 per cent) do not cycle at all.

In terms of the trend, cycling trip rates declined slightly between 2015/16 and 2017/18, but have been steadily increasing since 2017/18, up from 0.05 trips per person per day on average in 2017/18 to 0.06 in 2022/23. This year-on-year increase is likely related to the continued promotion of cycling, the expansion of the Cycleway network and to the shift in road use and wider travel patterns seen during and after the pandemic.

Cycling trip rates by sociodemographic group

Figure 11 looks at cycling trip rates by London residents broken down by sociodemographic group for the latest year (2022/23), the pre-pandemic baseline (2019/20) and 2015/16 for reference.

Figure 11 Cycling trip rates among London residents, by selected sociodemographic groups, LTDS, 2015/16, 2019/20 and 2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

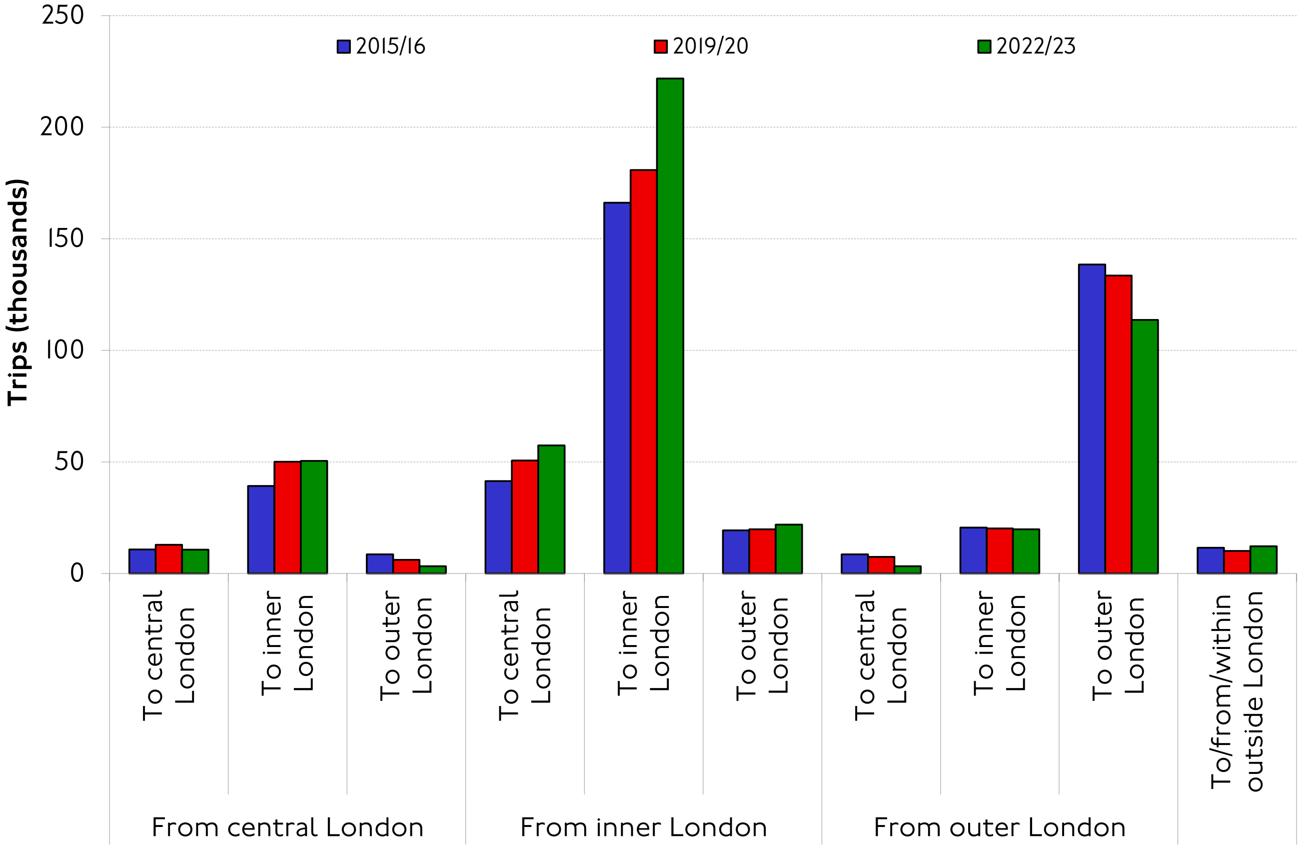
It is clear at first glance that cycling is skewed to certain sociodemographic groups, with men, people aged 25 to 44, White people and those in part-time employment showing significantly higher trip rates than the other groups in their categories (that is women, people of other ages and work statuses). Interestingly, trip rates by household income increase progressively as household income increases, indicating a financial link to cycling opportunities.

Another key feature is relatively little change over time across most groups, with very few exceptions, such as an increase in the trip rate of those working part time since the pandemic (but this could be linked to the reduction in the rate for those working full time and to an increase of part-time work rather than an attitudinal shift in that group); and an increase in the trip rate among those in households with incomes higher than £75,000 (but again this may be linked to economic rather than attitudinal factors).

Cycling by London area

The LTDS also allows us to explore the origin and destination of cycling trips. Figure 12 shows the total number of trips made by London residents to and from each of the central, inner and outer London areas.

Figure 12 London residents' cycling trips, by origin and destination area, LTDS, 2015/16, 2019/20 and 2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

By far, the largest number of trips takes place within inner London, followed by those wholly within outer London and then those between central and inner London (in both directions). The rest are all of much smaller magnitude.

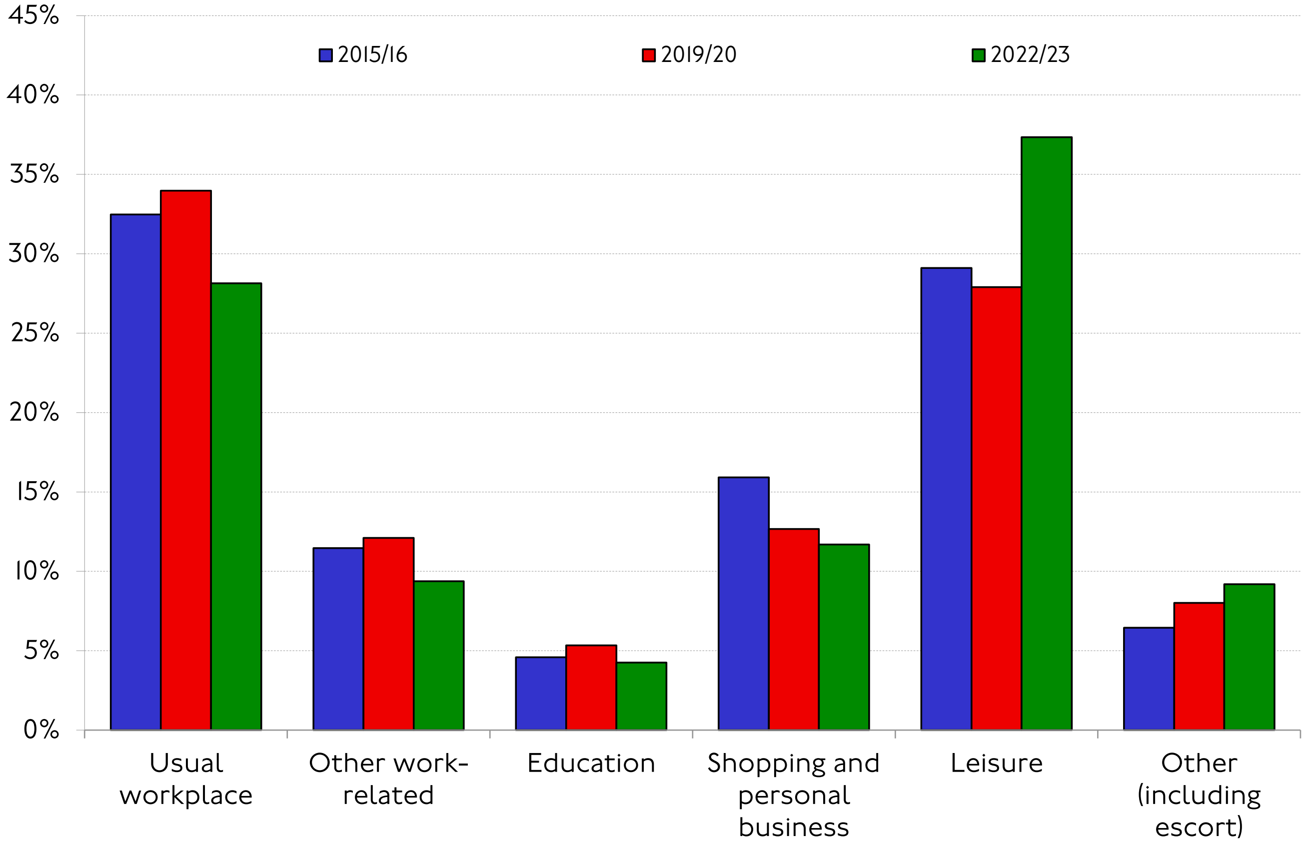
Trips originating in inner London have also grown the most over time, and particularly since the pandemic for those within inner London. On the contrary, trips originating in central London have decreased slightly.

Note that this data is based on a limited sample of London residents and focuses on the origin and destination of trips. This data is therefore of a different nature than the volume estimates (by area) provided above, which are based on a much more comprehensive set of cycle counts which are representative of cycling that takes place in those areas, regardless of trip origin or destination. Therefore, the conclusions suggested by both sources may not fully align.

Cycling by journey purpose

It is also insightful to explore the main journey purpose of cycling trips, and how this has changed over time and particularly since the pandemic (see figure 13).

Figure 13 Proportion of London residents' cycling trips by journey purpose, LTDS, 2015/16, 2019/20 and 2022/23.



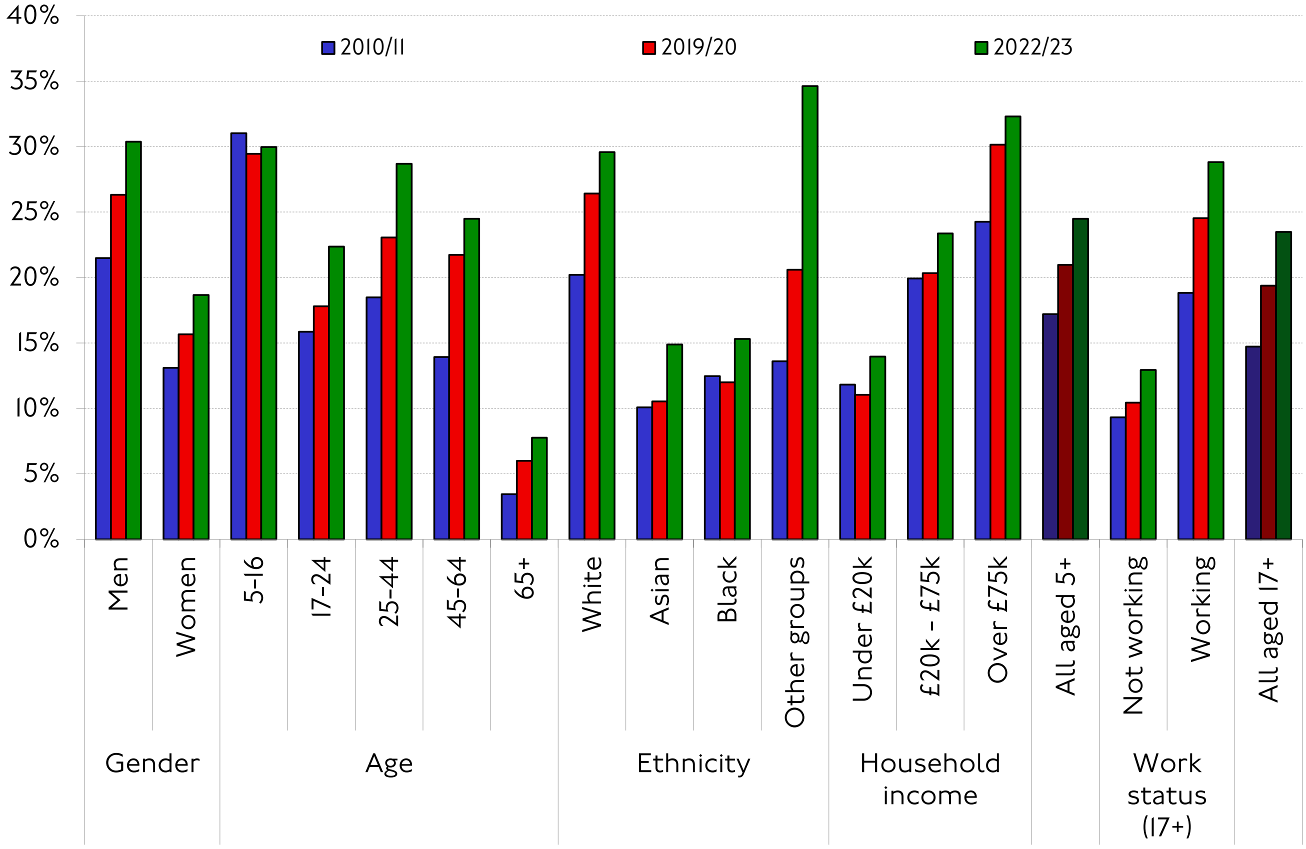
Source: TfL Strategic Analysis, Transport Strategy & Policy.

Before the pandemic, between 2015/16 and 2019/20, the proportion of cycling trips for work and education (which could be considered 'essential') was increasing at the expense of those for leisure, shopping and personal business (which could be classed as more 'discretionary'). The coronavirus pandemic reverted this trend to a large extent (likely due to the consolidation of hybrid working practices) and leisure trips made up the highest proportion of all trips in 2022/23 while the number and proportion of cycling trips for work-related purposes and education reduced. However, this was not the case for shopping and personal business cycling trips, which continued to decline in absolute and relative terms (as it happened on other modes) perhaps due to the continued expansion of online shopping, which started before (but was accelerated by) the pandemic.

Sociodemographic profile of London's cycling population in 2022/23

The London Travel Demand Survey (LTDS) provides insight into the sociodemographic characteristics of London residents who cycle. One way of looking at this is through the proportion of people who cycle across the main sociodemographic breakdowns. Figure 14 shows this for people who report having cycled at least once in the previous year.

Figure 14 Proportion of London residents who cycled at least once in the last year, by selected sociodemographic groups, LTDS, 2010/11, 2019/20 and 2022/23.

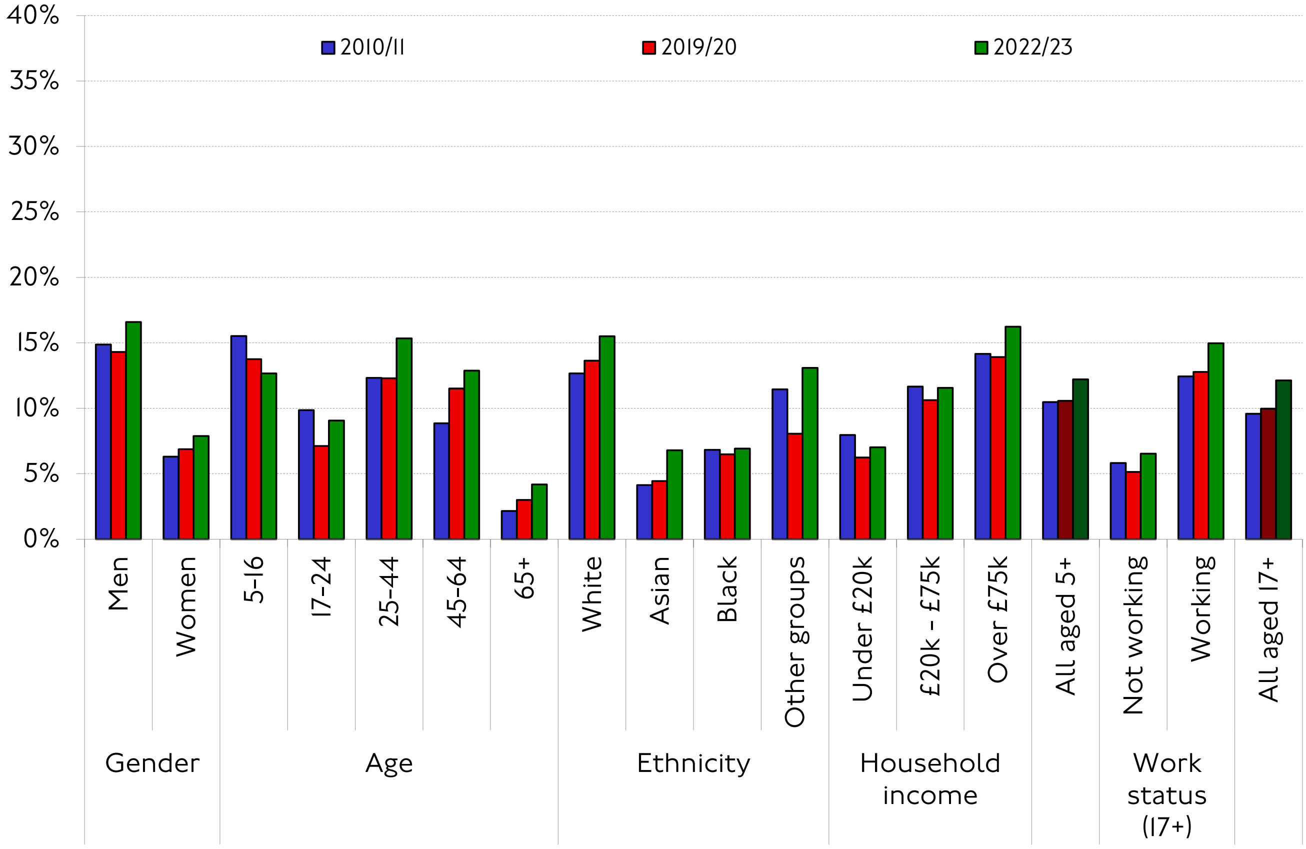


Source: TfL Strategic Analysis, Transport Strategy & Policy.
Note: For all sociodemographic categories except work status the base is all LTDS respondents (that is, London residents aged 5 and over). For work status the base is those of working age (London residents aged 17 and over). The 2010/11 cycling frequencies stem from an LTDS question that specifies cycling 'in summer', while in later years the question is phrased in general terms that are not season-specific.

Figure 14 shows that, over time, the proportion of London residents who cycle at least once a year has been increasing and was at 23 per cent in 2022/23 (for those aged 5 and over). This increase has happened across all sociodemographic groups but at different paces, with some groups showing particularly large increases in recent years. Note however that often these large increases occur in groups which are relatively small in absolute terms and are subject to large relative variations year on year (therefore, it would be expected that those large variations – positive or negative – may occur again in the future). It is also worth noting that some of the results from 2022/23 may still have been affected by coronavirus pandemic-related restrictions, since 'the last year' for those that were interviewed in April or May 2022 would have incorporated periods of strict lockdowns and other restrictions in 2021. This is particularly relevant because it is known that many people cycled occasionally and mostly for leisure during the pandemic.

Figure 15 looks at similar trends for people who cycled at least once a week and provides a complementary angle from what could be considered people who cycle regularly.

Figure 15 Proportion of London residents who cycled at least once in the last week, by selected sociodemographic groups, LTDS, 2010/11, 2019/20 and 2022/23.

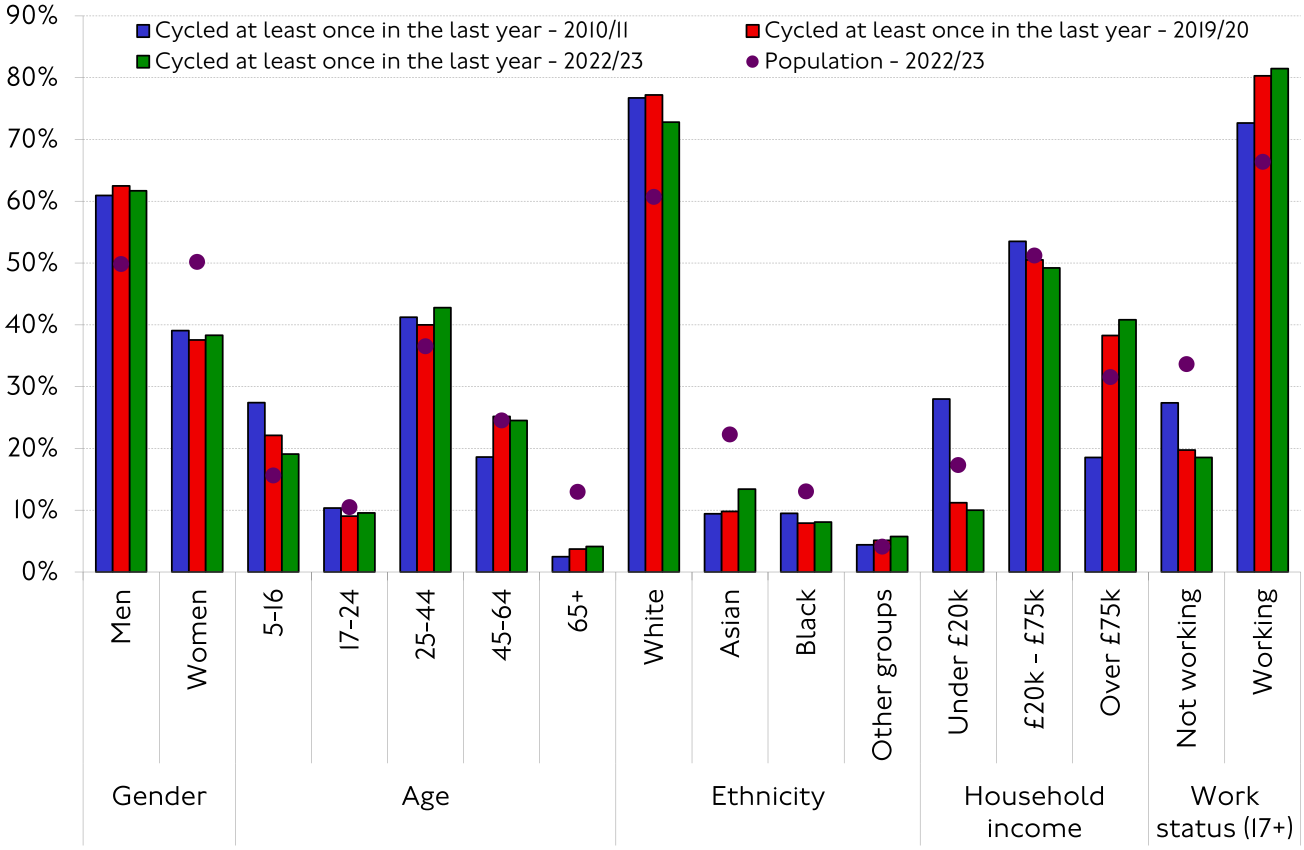


Source: TfL Strategic Analysis, Transport Strategy & Policy.
Note: For all sociodemographic categories except work status the base is all LTDS respondents (that is, London residents aged 5 and over). For work status the base is those of working age (London residents aged 17 and over). The 2010/11 cycling frequencies stem from a question that specifies cycling 'in the last month', which is different from the question used in the previous graph, and in later years the question is phrased in terms of a whole year, not just the previous month.

The first thing to note in figure 15 is a noticeably smaller order of magnitude in the proportion of London residents who cycled at least once a week compared to once a year as shown in figure 14. Overall, the proportion of London residents who cycle at least once a week has increased over time and was at 12 per cent in 2022/23 (for those aged 5 and over). What this suggests is that a lot of people would have started cycling on an occasional basis (as per figure 14) but relatively fewer have done so regularly. In this case, too, not all groups have seen consistent increases in cycling participation over time and among many groups there was a decline that the pandemic seems to have reverted.

To complete the picture of cycling representation, figure 16 shows the proportion of people from various sociodemographic groups who cycled at least once a year in 2022/23 compared to the immediate pre-pandemic baseline in 2019/20 and a reference year at the beginning of the previous decade, alongside the current proportion of people from each of those groups in the general population. This is a different way of looking at the same data by focusing on how representative the cycling is of the overall London population. Note that due to the adaptations that had to be made to the LTDS during the pandemic years, recent Travel in London reports have provided a version of this graph based on people who cycled at least once a week. Given that 2022/23 provides the first post-pandemic dataset that is fully comparable with pre-pandemic surveys the version below reverts to the more insightful and representative 'cycled at least once a year' metric.

Figure 16 Sociodemographic profile of London residents who cycled at least once in the last year versus population profile, LTDS, 2010/11, 2019/20 and 2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.
Note: For all sociodemographic categories except work status the base is all LTDS respondents (that is, London residents aged 5 and over). For work status the base is those of working age (London residents aged 17 and over). The 2010/11 cycling frequencies stem from an LTDS question that specifies cycling 'in summer', while in later years the question is phrased in general terms that are not season-specific.

What figure 16 shows is that, overall, and despite the positive signs of cycling uptake across the population (particularly considering cycling at least once in the last year) discussed in relation to figures 14 and 15 above, there are still representation imbalances in London residents' cycling population and little long-term change in relation to the sociodemographic profile of London residents' population as a whole. There is under-representation in several groups and over-representation in a smaller number of groups where cycling is most prevalent, these being particularly men, people of White ethnicity, and those in employment. Looking at it in more detail:

- In the longer-term context there has been only a small change in the cycling population, and long-standing imbalances in the representation of certain groups persist despite very gradual progress in recent years.
- In terms of **gender**, there has been very little net change in representation since 2010/11, and as of 2022/23 only 38 per cent of people who cycled were women. This is despite the fact that the proportion of women who cycled at least once a year increased from 13 per cent in 2010/11 to 19 per cent in 2022/23 (as shown in figure 16

above), thus suggesting that while more women are cycling now this increase is overshadowed by a similar or slightly larger increase in cycling among men.

- In terms of **age**, progress has been made over time in closing the gap of those over 65, although they remain under-represented in relation to the general population.
- Progress is also clear in terms of **ethnicity**, where despite the persisting over-representation of White people in 2022/23 there has been a noticeable improvement in the representation of Other ethnic groups and particularly Asian people in cycling.
- Work is still needed to improve the representation in terms of **working status**, where the under-representation of those not working seems to have increased over time. This is partly a reflection of the fact that people who do not work in general tend to travel less than people who work and the difference in travel rates between these two groups having increased slightly over time. Another reason for this may be that cycling is for many still considered a mode that is only accessible to those in employment, and perhaps associated with travel to work.
- Similarly, the imbalances in the representation by **household income** among people who cycle also seem to be going in the wrong direction, with an increasing over-representation of people with higher incomes and under-representation of people with the lowest incomes over time. This may be associated to the perceived unaffordability of cycling or perceptions of it as an elitist or luxury mode, but it is also worth noting that income brackets are not adjusted for inflation, and this would have affected the results given the time elapsed since 2010/11 and the high levels of inflation seen over the last couple of years.

Demand on Santander Cycles until 2023

TfL's cycle hire scheme opened in 2010 and currently operates under the Santander Cycles brand in all of central and some parts of inner London.

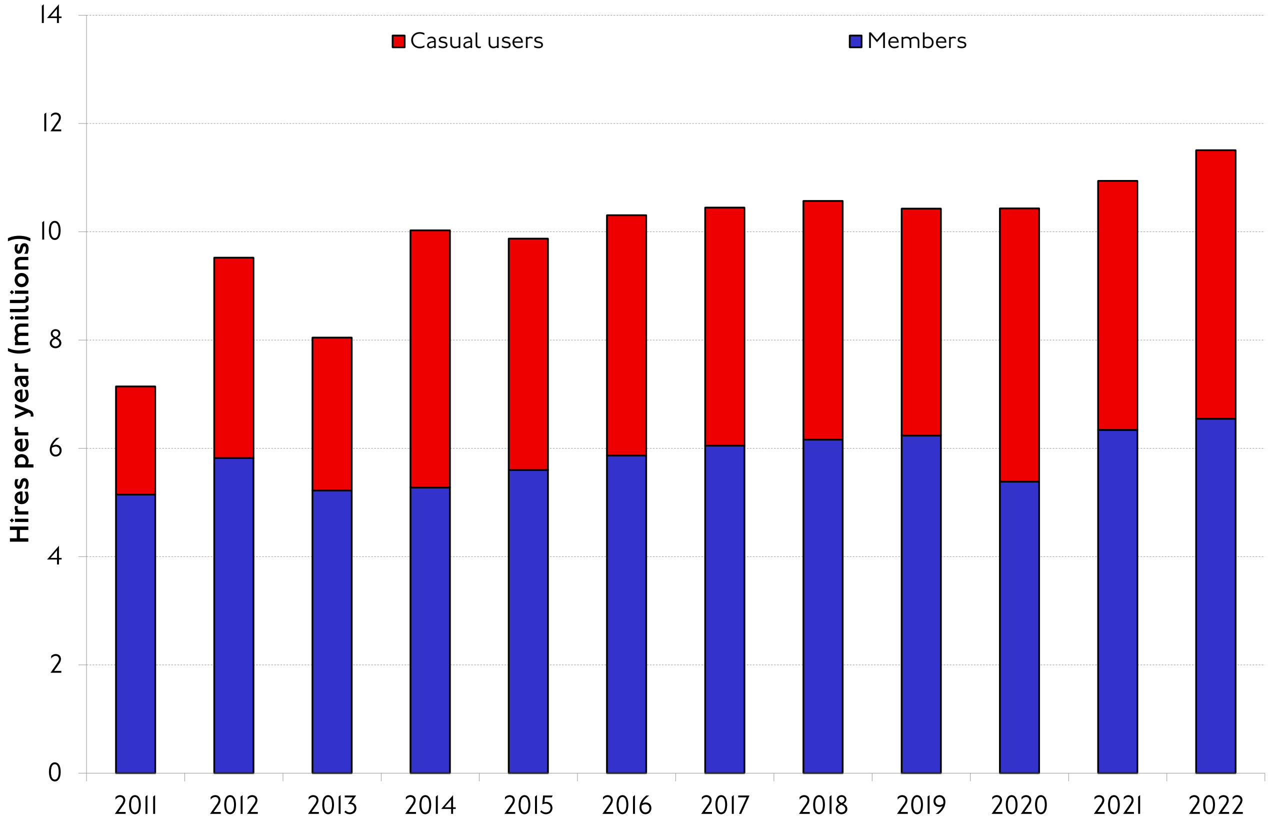
Demand for Santander Cycles increased in steps between 2011 and 2014 (peaking during the London 2012 Olympic and Paralympic Games) and then steadily until 2022 (figure 17). An important feature is that demand barely dropped in 2020, reflecting that cycling (and particularly Santander Cycles) demand was very resilient during the pandemic, when cycling was encouraged as a socially-distanced mode for essential workers (who received concessions on Santander Cycles) and exercise. In 2022 the annual demand increased by five per cent from 2021 (10 per cent since before the pandemic in 2019), which made it another record year.

The split between casual users and registered members of the scheme has remained fairly constant in recent years, with typically between 57 and 60 per cent of hires done by members. The notable exception was 2020, when a higher proportion of casual users led to an almost equal split (52 per cent of hires by members).

In September 2022 several changes were introduced to the scheme, which included:

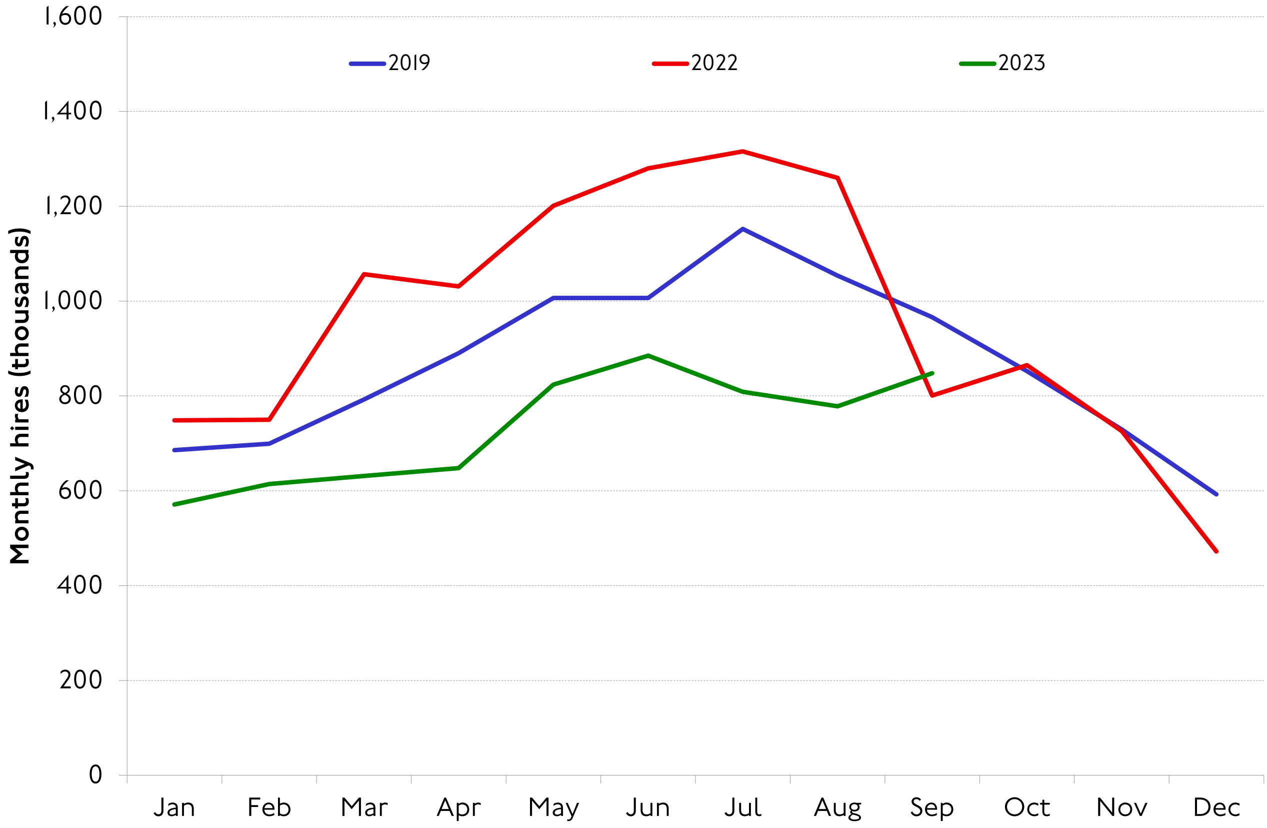
- The introduction of e-bikes for hire by members
- A restructure of the fare system (the first since 2013), including:
  - A flat fare for a 30-minutes ride at the same price of a bus ride, replacing the daily access charge which allowed unlimited rides of up to 30 minutes within 24 hours.
  - A monthly membership option, allowing unlimited 60-minute rides in the month
  - An increase in the allowance of annual memberships to unlimited 60-minute rides (previously capped at 30 minutes), with an increase in the membership price.

Figure 17 Annual demand on Santander Cycles by user type, 2011-2022.



Source: TfL Cycle Hire.

Figure 18 Santander Cycles hires by month, 2023 (to date) versus 2022 and 2019.

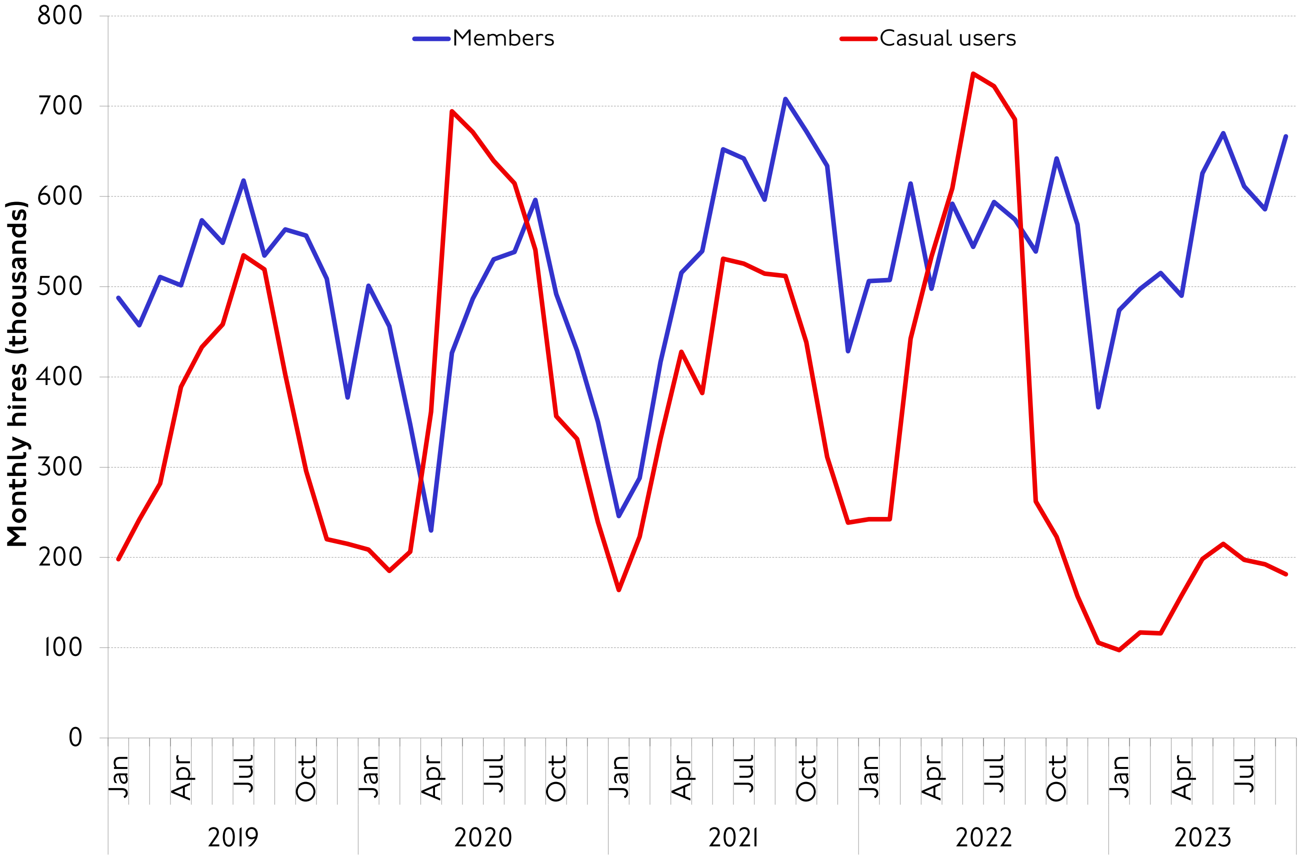


Source: TfL Cycle Hire.

Figure 18 shows a more recent monthly demand trend (from 2022 onwards and compared to the 2019 pre-pandemic baseline) where it is clear that the new fare system introduced in September 2022 contributed to a noticeable drop in demand to levels below the pre-pandemic baseline, a trend which has continued with fluctuations into 2023.

However, this overall drop in demand conceals an important feature about how this change affected different user types differently. Figure 19 shows the trend in monthly hires for the same period disaggregated by user type and in here it is evident that the reduction in demand was primarily driven by a drop in demand by casual users, while the number of hires by members has remained at a similar level or continued to increase.

Figure 19 Santander Cycles monthly hires by user type, Jan 2019-Sep 2023.



Source: TfL Cycle Hire.

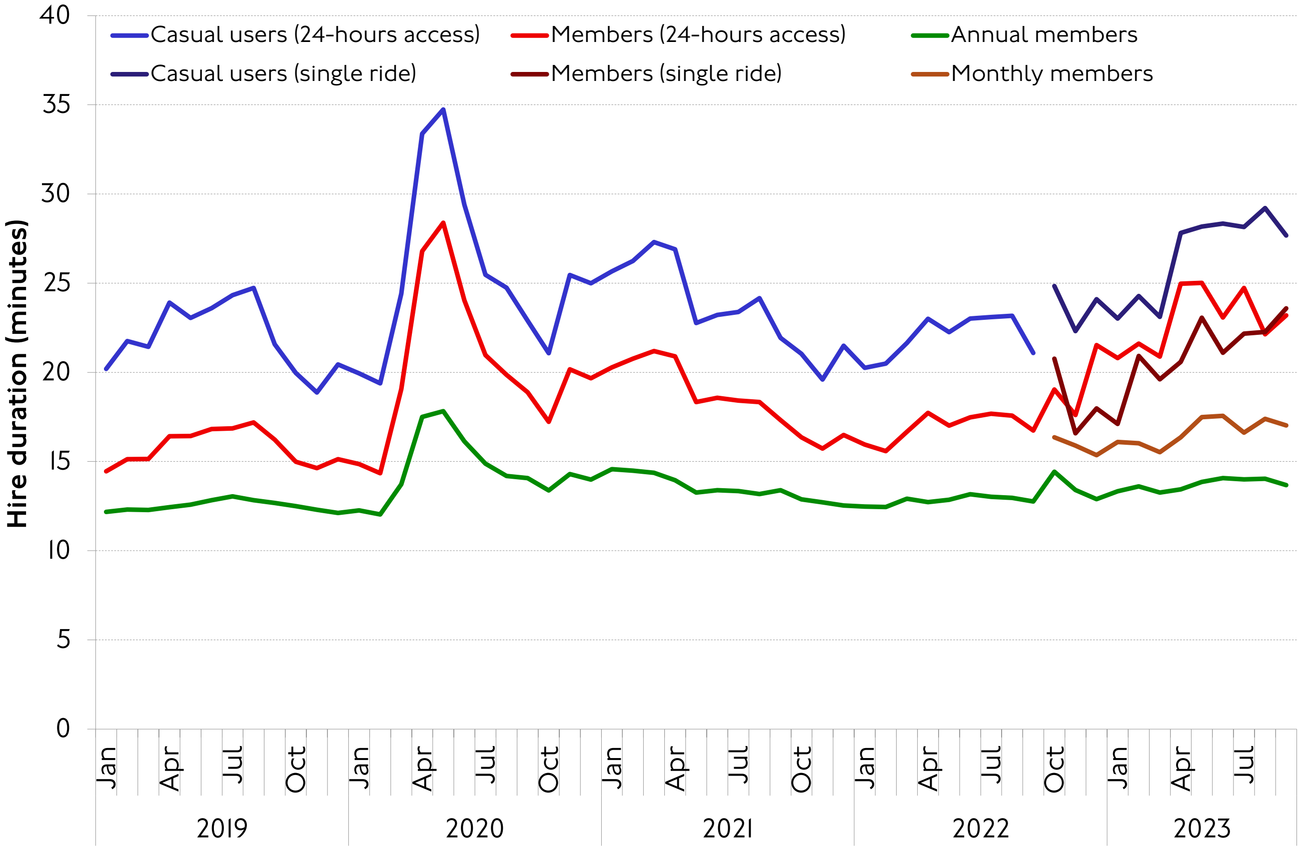
The changes to the scheme introduced in September 2022 (in particular, those affecting the maximum allowed hire time for a constant price) have also affected the average hire duration, as shown by figure 20.

It is evident that, save for the lockdown periods during the coronavirus pandemic in 2020 and 2021, the duration of hires has been relatively constant for all user types, albeit with marked differences among user groups, with less frequent users and those not registered as members showing increasing average hire durations.

After the changes in the fare system in September 2022, however, there has been a step increase in the average hire duration for all users except annual members. This likely reflects the changes to the maximum duration for the same hire price (which for many products increased from 30 to 60 minutes) as well as some second-order impacts of the changes to the cost of hire (for example, people trying to get more value out of slightly higher fares or using the service only for slightly longer journeys).

Interestingly, there has been little change on the average duration of hires among annual members, and the average duration among those with the newly available monthly membership is similar to that of members who accessed the system on an ad-hoc daily basis before the changes.

Figure 20 Average duration on Santander Cycles hires by user type, Jan 2019-Sep 2023.



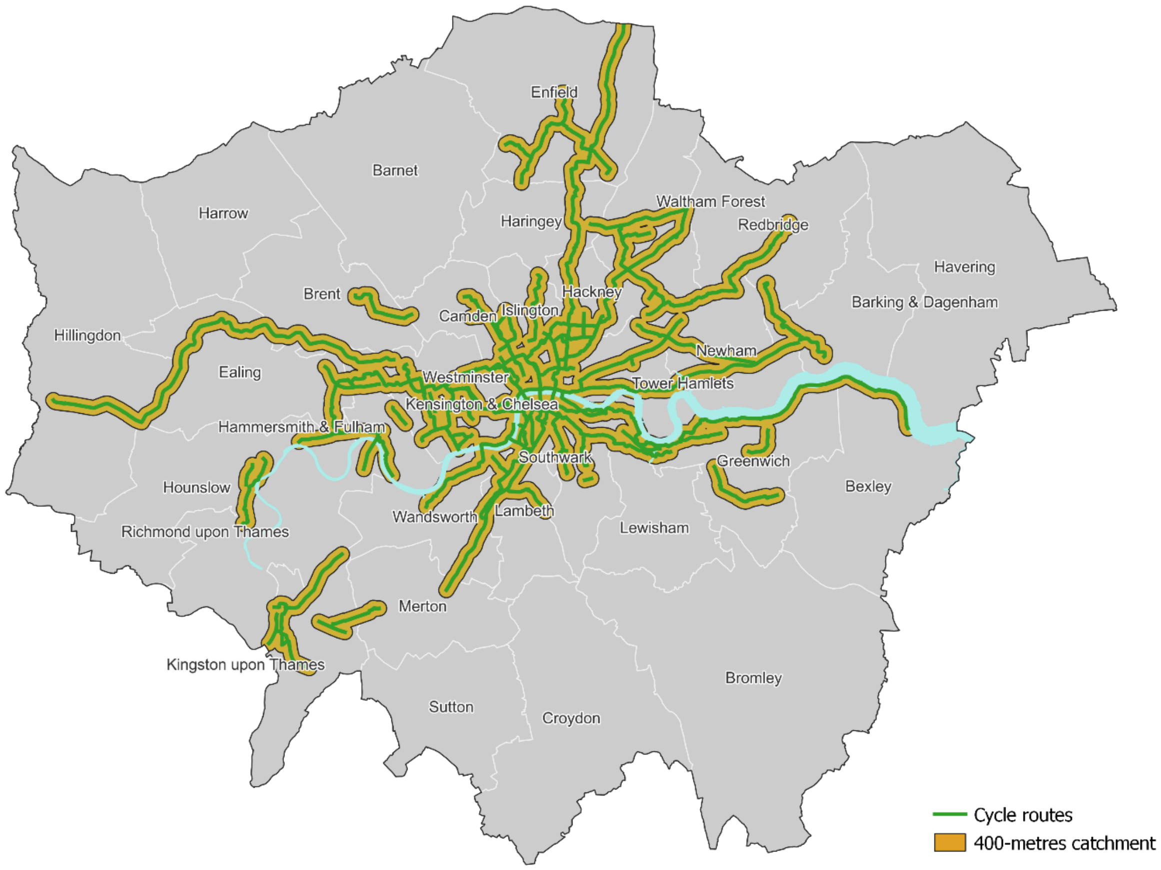
Source: TfL Cycle Hire.

Finally, the introduction of e-bikes to the Santander Cycles scheme has proven to be a success with customers. In the first year since their introduction in autumn 2022 more than 684,000 trips have been made on e-bikes by more than 50,000 different customers (with 65 per cent of trips done by annual members). This represents an average of more than four trips per e-bike per day compared to around two for conventional cycles. It has been observed that most e-bike trips are for commuting, with Waterloo station being the most popular pick-up point, followed by St James's Square and Wormwood Street.

London’s cycle network

The Cycling Action Plan 2, published in June 2023, sets a target for 40 per cent of Londoners to live within 400 metres of the strategic cycle network by 2030. As of November 2023, 24.2 per cent of Londoners lived within 400 metres of the strategic cycle network, 2.3 percentage points higher than the value of 21.9 per cent in autumn 2022, 12.7 percentage points higher than in 2019 before the pandemic (11.5 per cent) and 19.2 percentage points higher than in 2016 (an estimated five per cent).

Figure 21 London’s strategic cycle network, autumn 2023.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

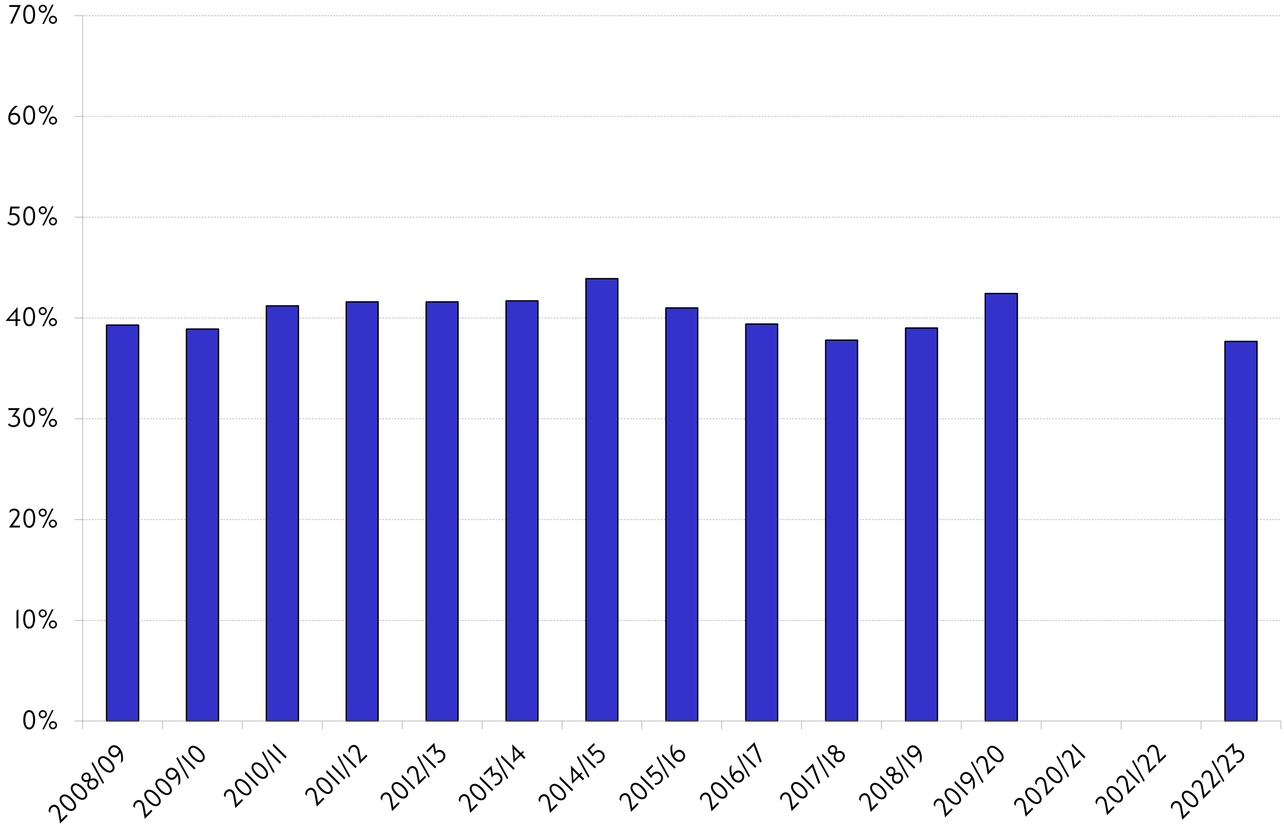
Physical activity and travel

The Mayor's active travel target is for all London residents to achieve at least 20 minutes of active travel (defined as either walking or cycling) per day by 2041. This can sometimes be achieved by trips that are made principally by another mode, for example walking to the station to catch a train. The London Travel Demand Survey (LTDS) offers the best available data source on active travel in London, giving a daily snapshot of travel behaviour by London residents.

Overall physical activity trend

The historic trend prior to the pandemic was relatively stable, with the proportion of London residents aged 20 or older achieving at least 20 minutes of active travel per day fluctuating at around 40 per cent up to 2019/20 (figure 22).

Figure 22 Proportion of London residents aged 20+ who achieved at least 20 minutes of active travel per day, LTDS, 2008/09-2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

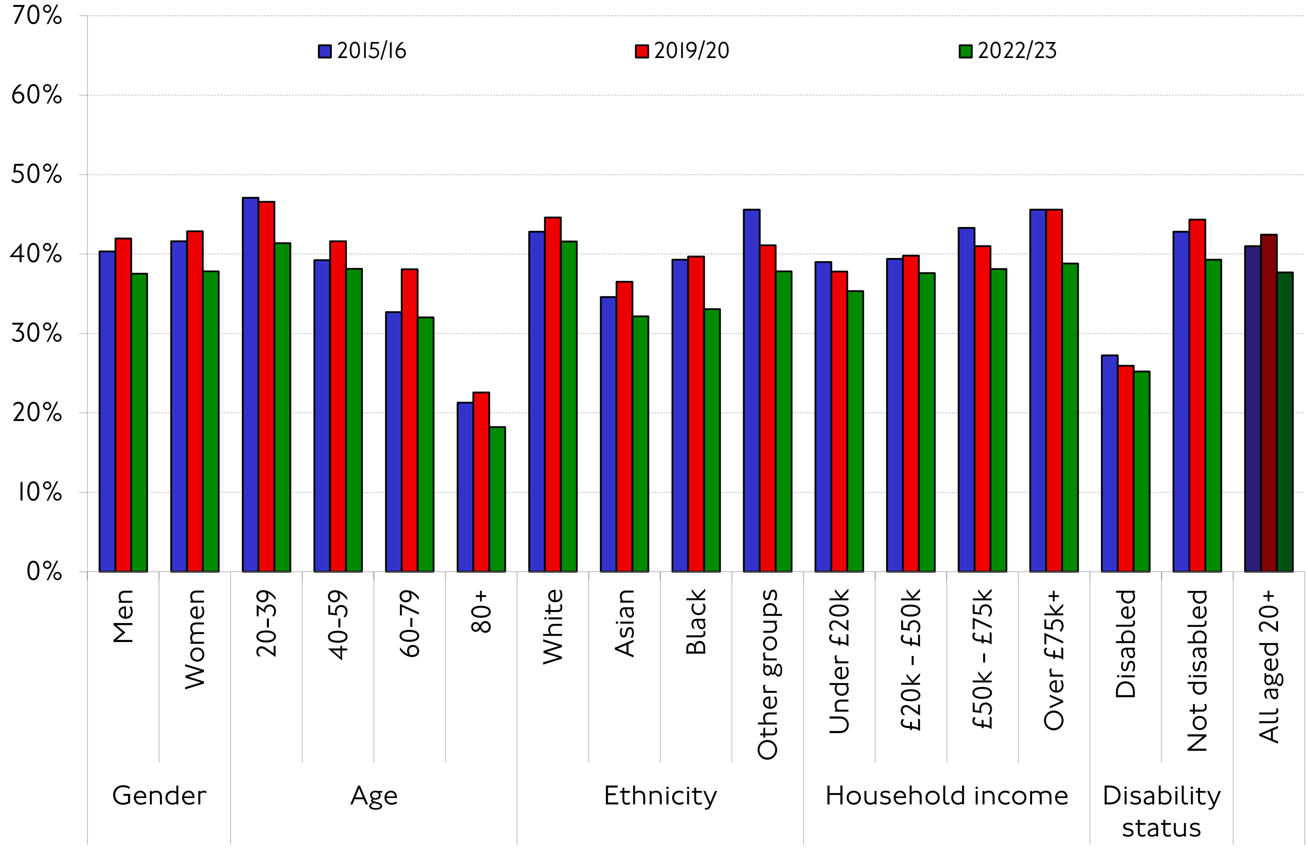
Between 2014/15 and 2017/18 there was a gradual downward trend in this metric, associated with an overall decline in trip rates. Just before the pandemic, the measure increased for two years, with 42 per cent of London residents, aged 20 or over, achieving at least 20 minutes of active travel per day in 2019/20. Pandemic restrictions on the survey meant that a comparable measure is not available, although other indicators of walking during the pandemic were reviewed in [Travel in London reports 14](#) and [Travel in London report 15](#).

Data for 2022/23 shows that the measure has not fully recovered from the pandemic, and currently stands at 38 per cent, which is the same level as in 2017/18. Although the use of active modes was higher in 2022/23 than before the pandemic, active travel is often used to access public transport, and the ongoing shortfall in public transport usage since the pandemic (roughly 10 per cent in autumn 2023) is probably the major factor underlying the recent trend in this measure.

Physical activity by sociodemographic group

The overall figure of 38 per cent of London residents aged 20 or older achieving at least 20 minutes of active travel per day in 2022/23 varies markedly when broken down by sociodemographic group (figure 23).

Figure 23 Sociodemographic profile of London residents aged 20+ who achieved at least 20 minutes of active travel per day, LTDS, 2015/16, 2019/20 and 2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

There is little difference by gender, with 38 per cent of both men and women achieving the target in 2022/23. Age has a much bigger effect, with a decline in the proportion of residents meeting the target in older age groups. In 2022/23, 41 per cent of residents aged between 20 and 39 met the target. This falls to just 18 per cent of residents aged 80 and over.

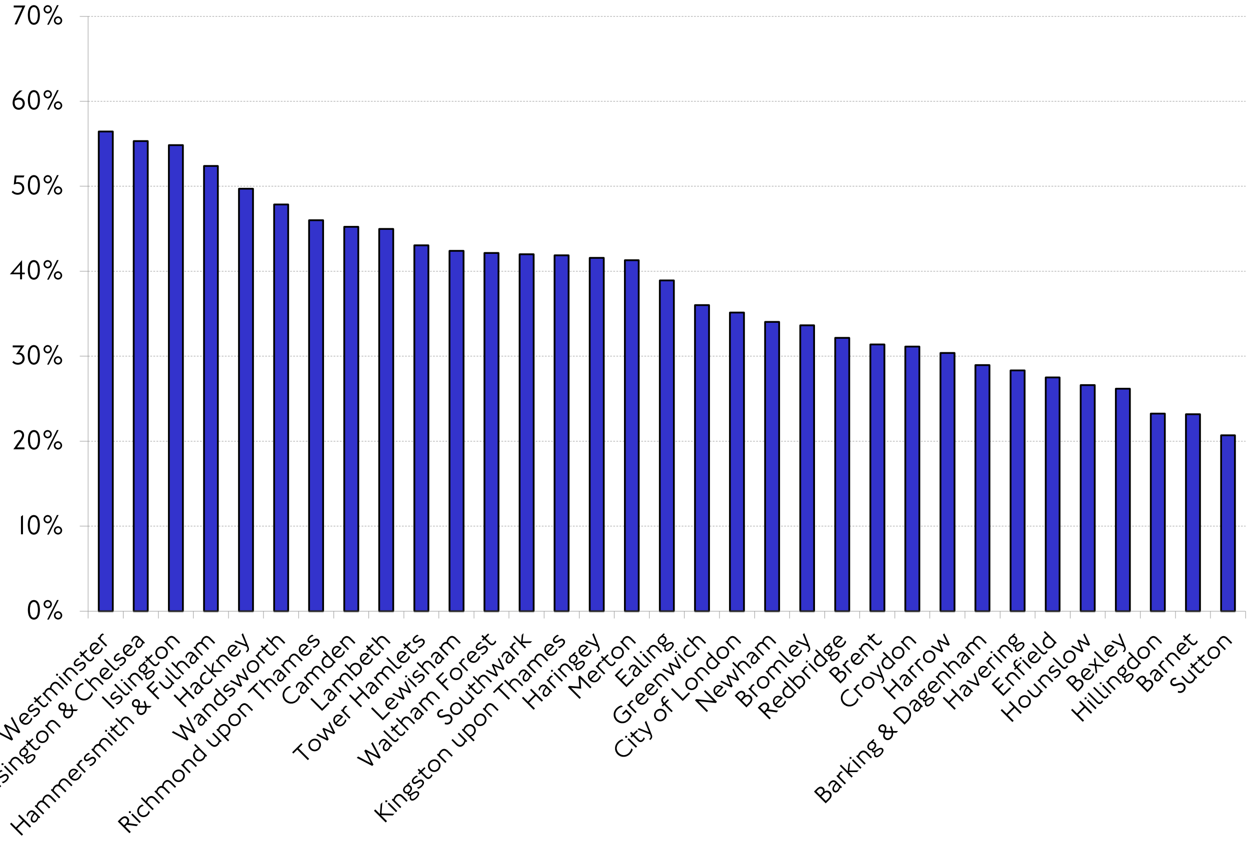
The proportion of residents meeting the target also varies by ethnicity, with 42 per cent of White residents meeting the target in 2022/23, 33 per cent of Black residents and 32 per cent of Asian residents. When looking at household income, London residents in higher income households are more likely to meet the 20 minute active travel target. Disability also has a big impact, with 25 per cent of London residents with a disability meeting the target in 2022/23.

As with overall travel demand, the proportion of people meeting the active travel target has declined across all sociodemographic groups since the pandemic, following a slight increase across most groups between 2015/16 and 2019/20.

Physical activity by borough

The proportion of London residents aged 20 or older achieving at least 20 minutes of active travel per day varies across London, with residents in inner London more likely to achieve at least 20 minutes of active travel than outer London residents. In 2022/23, more than half of all residents aged 20 and above in Westminster, Kensington & Chelsea, Islington and Hammersmith & Fulham achieved at least 20 minutes of active travel. In contrast, fewer than a quarter of residents of Hillingdon, Barnet and Sutton met the 20 minute target (figure 24).

Figure 24 Proportion of London residents aged 20+ who achieved at least 20 minutes of active travel per day, by borough of residence, LTDS, 2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.