March 2025

# Travel in London 2024

## Active travel trends

MAYOR OF LONDON

TRANSPORT FOR LONDON
EVERY JOURNEY MATTERS

# Travel in London 2024

## Active travel trends

## 2024 update

# Table of contents

# Summary of key findings

This report presents an update on the latest trends in active travel (cycling, walking and physical activity) until year 2024 (or financial year 2023/24, according to data availability). It is the last of the documents from the Travel in London 2024 reports family.

For more information about any of the items featured in this report please contact TiLEnquiries@tfl.gov.uk.

## Cycling

- In 2023, the estimated trip-based cycling mode share in London was 4.5 per cent.
- In 2024 there were an estimated 1.33 million daily cycle stages in London, up by 5 per cent from 1.26 million in 2023 and by 26 per cent from 1.05 million in 2019. In terms of cycling trips, 2024 saw 1.25 million daily cycling trips, up from 1.17 million in 2023 and 0.99 million in 2019.
- In 2023, demand on Santander Cycles dropped by 26 per cent following a sharp decrease in the number of hires by casual users (member hires continued to increase). This is thought to reflect primarily the response to changes to the fare system implemented in late 2022 and the increased competition from dockless cycle hire schemes in London. To mitigate this, TfL introduced a Day Pass option in March 2024.
- According to our London Travel Demand Survey (LTDS), in 2023/24 the proportion of London residents who cycled at least once in the previous year was 23 per cent, slightly down from 24 per cent in 2022/23 but higher than the 21 per cent seen in 2019/20 before the coronavirus pandemic. The increase of two percentage points between 2019/20 and 2023/24 is equivalent to around 190,000 more London residents who cycled at least once in the previous year (a 10 per cent increase).
- Looking at the proportion of London residents who cycled at least once in the previous year by sociodemographic category, this increased in almost all groups in 2022/23-2023/24 compared to 2017/18-2019/20 before the pandemic. However, in 2022/23-2023/24 some groups continued to show higher proportions than the average (for example men, younger, White, or non-disabled London residents in employment and living in higher-income households). These differences have only modestly changed in recent years, with imbalances also remaining when comparing the profile of people who cycled at least once in the previous year with the full LTDS sample.
- In the years 2022/23-2023/24 a noticeably higher proportion of cycling trips by London residents were for leisure purposes than before the pandemic, with a corresponding reduction in the proportion of trips for other purposes, notably work-related and shopping or personal business. This mirrors travel trends seen across other modes.
- By September 2024, the strategic cycle network had grown to 403 kilometres from 90 kilometres in 2016, so that 27 per cent of Londoners lived within 400 metres of the strategic cycle network, up from 24 per cent in 2023 and five per cent in 2016.

## Walking

- Walking (all the way) trip rates among London residents have fluctuated in recent years. Following a pandemic-related increase to 0.81 trips per person per day in

2022/23, in 2023/24 the trip rate fell to 0.73 trips per person per day. This is a similar level to 2016/17 and slightly less than the trip rate immediately before the coronavirus pandemic in 2019/20 (0.76 trips per person per day) and can be interpreted as largely part of the post-pandemic recovery.

- In 2023/24, most walking (all the way) trips by London residents were for leisure (37 per cent) and shopping or personal business (26 per cent). From 2019/20 to 2023/24 the proportion of walking (all the way) trips for shopping or personal business decreased by three percentage points, while the proportion of trips for leisure increased by three percentage points.
- Pedestrian activity (footfall) in central London continued to increase gradually in 2024, with the first three quarters of the year cumulatively showing a four per cent increase in pedestrian flows compared with the same quarters in 2023. However, this growth in pedestrian activity in central London appears to be levelling off. This could reflect the impact of hybrid working patterns or the uncertain economic outlook resulting in fewer discretionary trips into central London for shopping or leisure purposes.
- The recovery in pedestrian activity in central London has not been even across all areas. In quarter 3 2024 (July to September), pedestrian flows in the West End were only three per cent lower than in the same quarter of 2019, while pedestrian activity in the City was still 19 per cent lower than the same quarter of 2019.

## Active travel

- The Mayor's aim is for all London residents to undertake at least 20 minutes of active travel per day by 2041, defined as either walking or cycling. The way this is measured through the LTDS means that this is demonstrated by 70 per cent of the LTDS sample of London residents achieving 20 minutes of active travel in the day they were surveyed. In 2023/24 this proportion was 37 per cent, down from 38 per cent in 2022/23. This was likely due to a decline in the walking (all the way) trip rate and the continuing shortfall in the post-pandemic recovery on public transport use, where intermediate walking journey stages are often made as part of longer trips where public transport is the main mode. This indicator would therefore be expected to increase as public transport patronage continues to return to pre-pandemic norms.
- The proportion of London residents who did at least 20 minutes of active travel per day in 2023/24 varied by sociodemographic group:
  - There was little difference by gender, with 37 per cent of men and 36 per cent of women meeting the target in 2023/24.
  - Younger residents were more likely to meet the target, with 40 per cent of those aged 20-39 doing so in 2023/24, compared to 21 per cent of those aged 80 and over.
  - By ethnicity, 40 per cent of White London residents, 32 per cent of Asian residents and 29 per cent of Black residents did at least 20 minutes of active travel in 2023/24.
  - Finally, London residents living in households with incomes over £75k were most likely to meet the 20 minutes of active travel target (39 per cent).
- The achievement of the active travel target also varied spatially in 2023/24, with residents of inner London (particularly the more central boroughs) more likely to have undertaken at least 20 minutes of active travel per day than residents of outer London boroughs. More than 50 per cent of residents of the City of London, Kensington & Chelsea and Westminster did at least 20 minutes of active travel in

2023/24. In outer London, residents of Richmond upon Thames were most likely to have achieved the target (41 per cent), followed by those from Ealing (39 per cent). In contrast, fewer than 25 per cent of residents of Bexley, Havering and Hillingdon met the active travel target in 2023/24.

# Cycling

With a trip-based mode share of 4.5 per cent in 2023, cycling remains a relatively smaller mode of transport in the overall London context. However, after some years of stagnation before the coronavirus pandemic, cycling has seen a strong resurgence and sustained growth since 2022 and continues to be seen as critical in helping to achieve various aims from the Mayor's Transport Strategy such as 80 per cent of trips in London made by active, efficient and sustainable modes by 2041 or all Londoners undertaking at least 20 minutes of active travel per day by 2041. This section explores the latest demand trends for cycling as well as recent changes to the cycling population and London's cycling network.

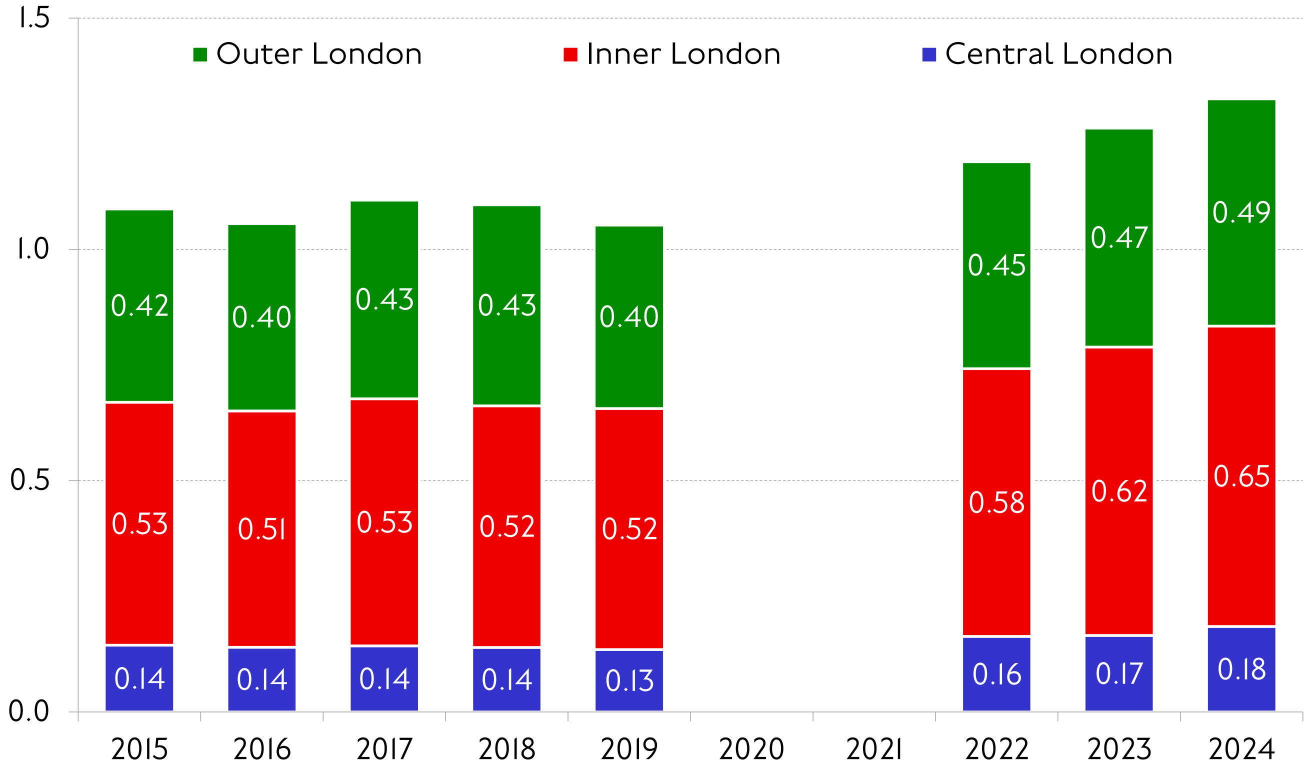
## Cycling demand

### Consolidated estimates of cycle journeys

The Cycling Action Plan 2 set an ambitious target for the number of daily cycle journeys in London to increase by 33 per cent to 1.6 million by 2030 (from 1.2 million in 2022).

The measure to track progress towards this target is estimated from annual weekday cycle counts on a representative panel of locations across London combined with factors derived from our London Travel Demand Survey (LTDS). A detailed methodology note is available. Figure 1 shows the trend in this measure by area since 2015.

Figure 1 Daily cycle stages (in millions) in London by area, seven day-week average, 2015-2024.




Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020 and 2021 due to the impacts of the coronavirus pandemic.

While there was little net overall change in cycling between 2015 and 2019 (although see figure 2 below for the longer-term context), since 2022 there has been substantial and sustained growth in cycling across all London areas.

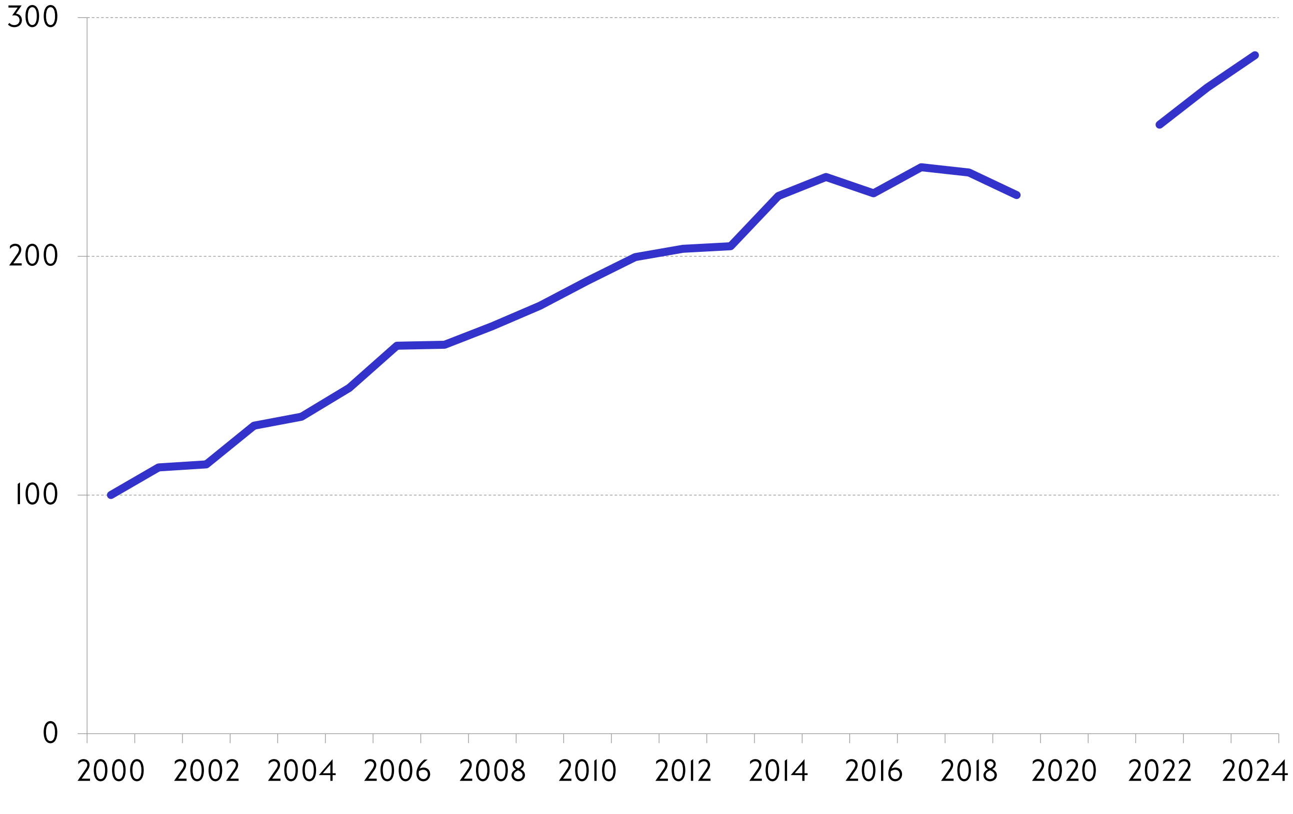
In 2024 there were an estimated 1.33 million daily cycle stages across London, up by five per cent from 1.26 million in 2023 and by 26 per cent from 1.05 million in 2019 before the pandemic. Between 2023 and 2024 growth was strongest in central London (11.6 per cent) followed by inner (4.2 per cent) and outer London (3.8 per cent). In absolute terms, however, inner London continued to see the most cycle stages (almost 650,000) in 2024.

In terms of trips, in 2024 there were 1.25 million daily cycle trips across London, up by six per cent from 1.17 million in 2023 and by 27 per cent from 0.99 million in 2019, with growth between 2023 and 2024 also highest in central London (13.1 per cent), then inner (5.6 per cent) and finally outer London (5.4 per cent). The relatively higher growth in trips compared to stages suggests a relatively higher increase in cycling-all-the-way trips compared to cycling as part of multi-modal trips.

### Cycling demand in the historic context

It is also of interest to look at the recent changes in cycling in the longer-term context (figure 2). Note that although the method to estimate cycling journey stages changed in 2015, this graph shows relative change and therefore corrects for that break in the series.

Figure 2 Change (index 2000 = 100) in cycling journey stages, 2000-2024.



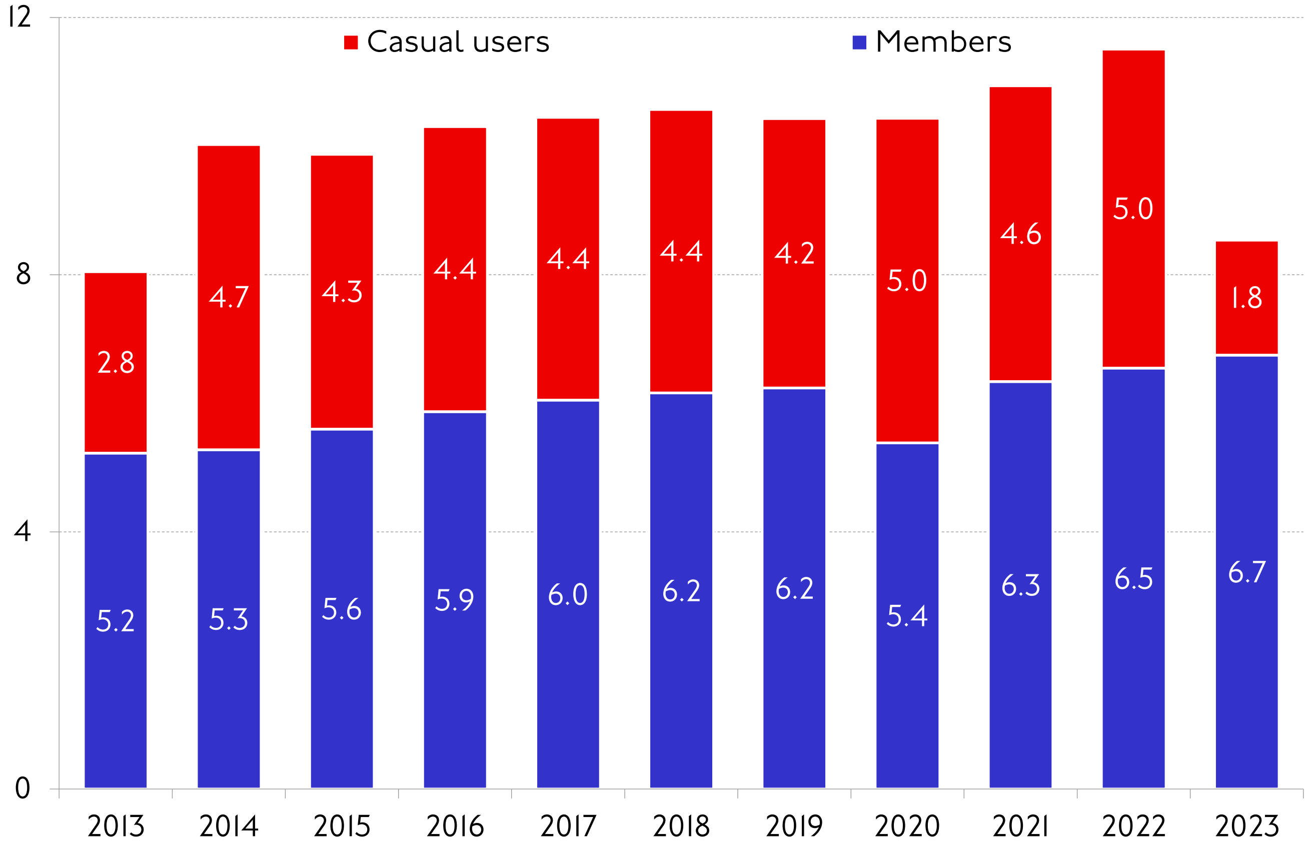

Source: TfL Strategic Analysis, Customer & Strategy.
Note: The method used to estimate cycle trips changed in 2015. | Comparable data is missing for 2020 and 2021 due to the impacts of the coronavirus pandemic.

Of particular note is the fast pace of growth between 2000 and 2015 (226 per cent, more than doubling the number of cycling journey stages), and also since 2022 after the coronavirus pandemic and after some years of stagnation between 2015 and 2019.

## Demand on Santander Cycles

Santander Cycles is the brand name of TfL's cycle hire scheme, which provides access to more than 13,000 cycles (both conventional pedal cycles and e-bikes) from more than 21,000 docking points across almost 800 docking stations in central and some parts of inner London. Figure 3 shows the trend in the annual demand on this service by user type over the last decade.

Figure 3 Annual hires (in millions) on Santander Cycles by user type, 2013-2023.




Source: TfL Cycle Hire.

Following a long-term trend of net and sustained growth until 2022 (with remarkable resilience to the coronavirus pandemic shocks observed in 2020 and 2021), in 2023 the annual demand on Santander Cycles saw a drop of 26 per cent from the previous year.

On closer inspection, it is seen that this drop occurred only for demand from casual users (that is, those who are not registered members), while hires by members continued to increase (by three per cent between 2022 and 2023).

This decrease in casual user hires is thought to reflect two main factors:

- Firstly, the changes to the fare system that were introduced in late 2022 (whose full impact is only apparent in the annual 2023 statistics). In particular, the withdrawal of the 24-hour tariff, which was replaced by a single ride fare. To mitigate this, TfL introduced a Day Pass option in March 2024.
- Secondly, the rise in dockless cycles (particularly e-bikes) from private operators, which compete for the same customer base. It is estimated that the main private operators together sum between four and five times more cycles than TfL's Santander Cycles. The fact that they are dockless also means that they can often be

found near Santander Cycles stations and have the competitive advantage that they can be picked up and dropped off anywhere. TfL is undertaking several initiatives to mitigate this and help win customers back, for example enhancing the on-street and digital propositions and increasing the number of e-bikes on the Santander Cycles fleet. Over the summer of 2024 an additional 1,400 e-bikes were introduced, replacing conventional pedal cycles on street, so that currently one in six Santander Cycles available for hire is an e-bike.

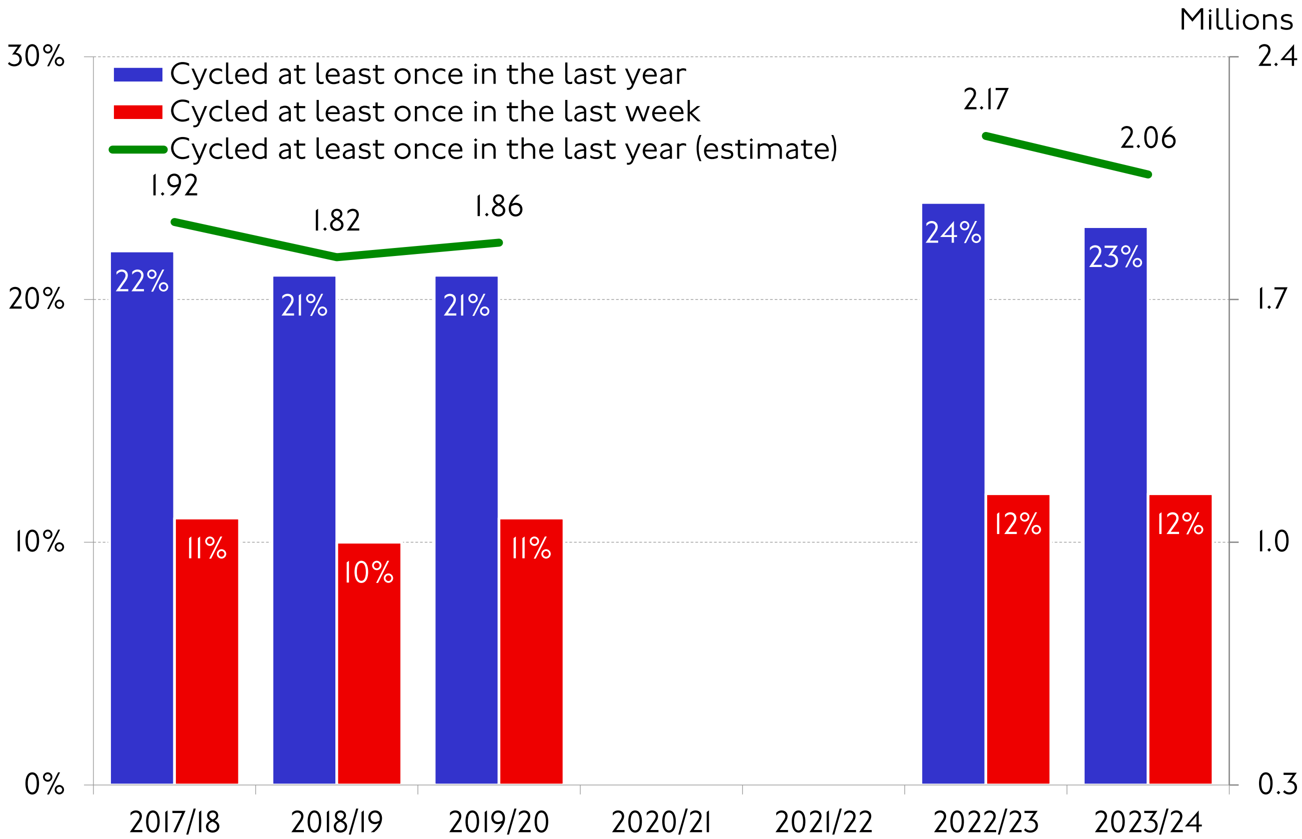
## Cycling by London residents

In addition to the aggregate trends in cycling volume described above it is important to analyse individual cycling behaviour. The LTDS can be used to explore this.

**Overall proportion of people who cycle**

The LTDS provides an indication of the proportion of the general population who cycles. Figure 4 shows the trend over the last few years for people who cycled at least once in the last year and those who cycled at least once in the last week. Alongside those proportions, an estimated absolute number of London residents who cycled at least once in the last year (using the latest population estimates) is also provided.

Figure 4 Proportion and estimated number London residents who cycled at least once in the last year or at least once in the last week, LTDS, 2017/18-2023/24.




Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

In general, the proportion of London residents who cycle was quite stable over the assessed period, with those who cycled at least once in the last year fluctuating between 21 and 24 per cent of the London resident population and those who cycled at least once in the last week between 10 and 12 per cent.

In 2023/24 these proportions decreased slightly. However, considering the longer-term context shown in the graph, this appears to be related to a return to pre-pandemic norms rather than to any specific issue in 2023/24. It is also worth bearing in mind that year-on-year fluctuations are a common feature in the LTDS cycling data, which is best suited to capture longer-term trends.

Equally, it is worth noting that in the context of a large (and growing) population, even relatively small changes in the proportions represent progress in absolute terms. For example, the increase in the proportion of people who cycled at least once in the previous year from 21 to 23 per cent between 2019/20 (before the pandemic) and 2023/24 is equivalent to around 190,000 more London residents, a 10 per cent increase.

The LTDS results are not too dissimilar to those found in the Department for Transport's National Travel Survey (NTS) for London, which for the 2023 calendar year reported that 30 per cent of London residents cycled at least once a year and 13 per cent at least once a week. It is worth noting that while the NTS and LTDS methodologies are quite similar, the NTS sample size for London (around 2,600 individuals) is much smaller than that of LTDS (around 17,600 people).

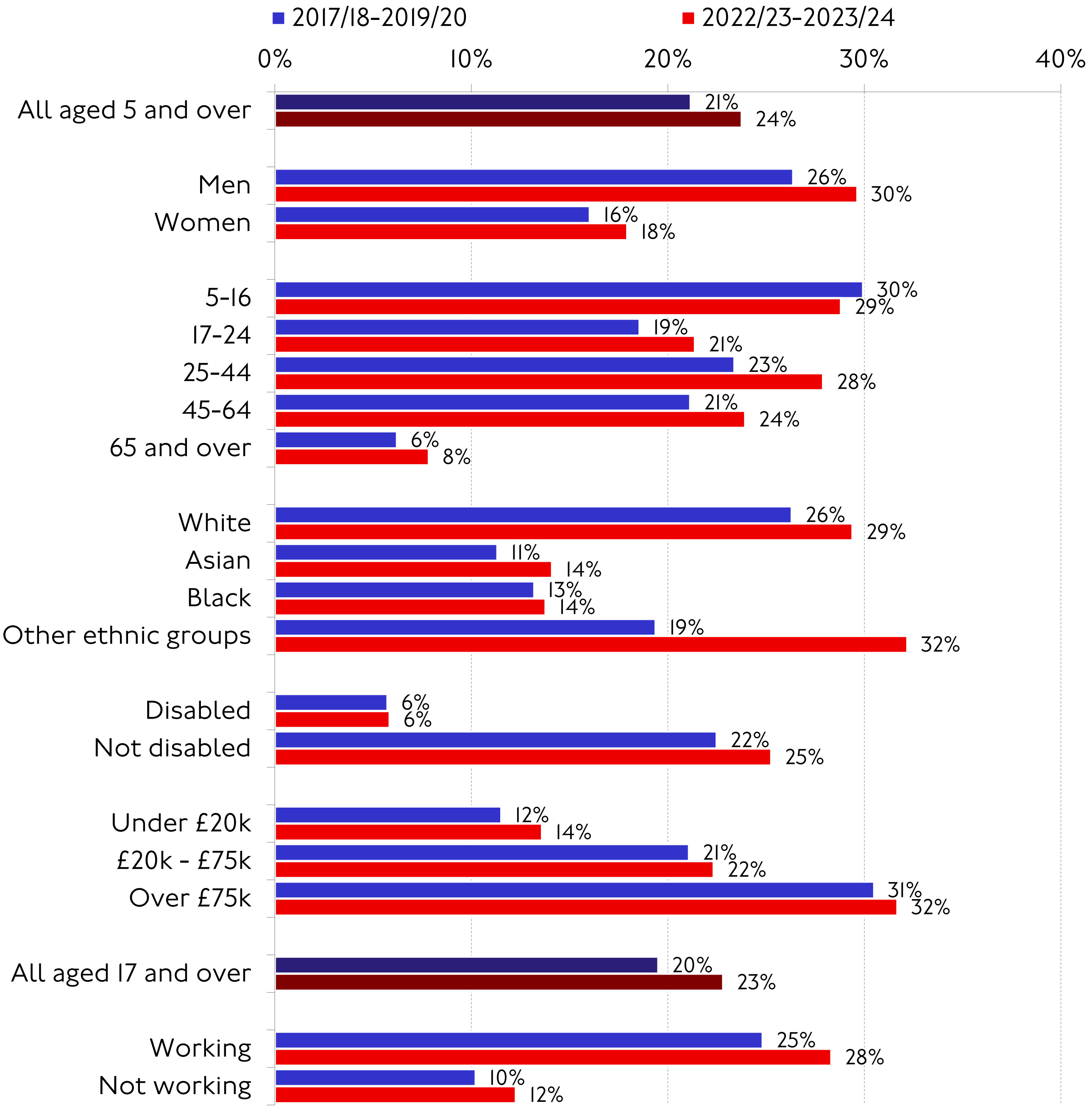
In terms of the apparent possible contradiction of these trends with the recent growth in 'on street' cycling discussed in figure 1 above, these could be explained by the fact that the LTDS is limited to personal travel (and does not include travel in the course of work), to London residents (excluding day or overnight visitors) and to people aged five and over; and by the annual variability that is to be expected with a survey such as LTDS. These methodological differences are key and while the LTDS is a voluntary (and therefore to some extent self-selected) household survey where London residents are asked to report their past personal travel behaviour, the counts that give rise to the demand estimates in the previous section measure actual cycle flows as observed on the cyclable network. These flows, by definition, include cycling for any purpose (personal or as part of a job – for example as a cycle courier) and by any person (London resident or not). Furthermore, the latest counts are from spring 2024 and post-date the latest LTDS results, which cover the full 2023/24 financial year.

### Proportion of London residents who cycled at least once in the last year

It is also interesting to explore in more detail the proportion of London residents who cycle (defined as those who cycled at least once in the last year) by looking at differences by sociodemographic group.

Given that some of the groups have small sample sizes in any single year of LTDS data, the results in figure 5 are aggregated to three (or when not possible, two) years.

Figure 5 Proportion of London residents who cycled at least once in the last year, by selected sociodemographic groups, LTDS, 2022/23-2023/24 average versus 2017/18-2019/20 average.




Source: TfL Strategic Analysis, Customer & Strategy.
Note: For all categories except working status the base is all LTDS respondents (that is, London residents aged five and over). For work status the base is those of working age (London residents aged 17 and over).

Overall, in 2022/23-2023/24 there was a small increase in the proportion of London residents who cycled at least once a year across all sociodemographic groups, compared to before the pandemic. Note that when taking the averages, the small decrease between 2022/23 and 2023/24 for all London residents described in figure 4 above gets masked by the averaging and the larger increase from before the pandemic.

Despite this progress, imbalances in the representation of cycling remain among certain groups. These can be explored further by comparing the distribution of London residents who cycle in those groups with their distribution in the full LTDS sample (table 1).

Table 1 Sociodemographic profile of London residents who cycled at least once in the last year versus LTDS full sample profile, LTDS, 2022/23-2023/24 average.

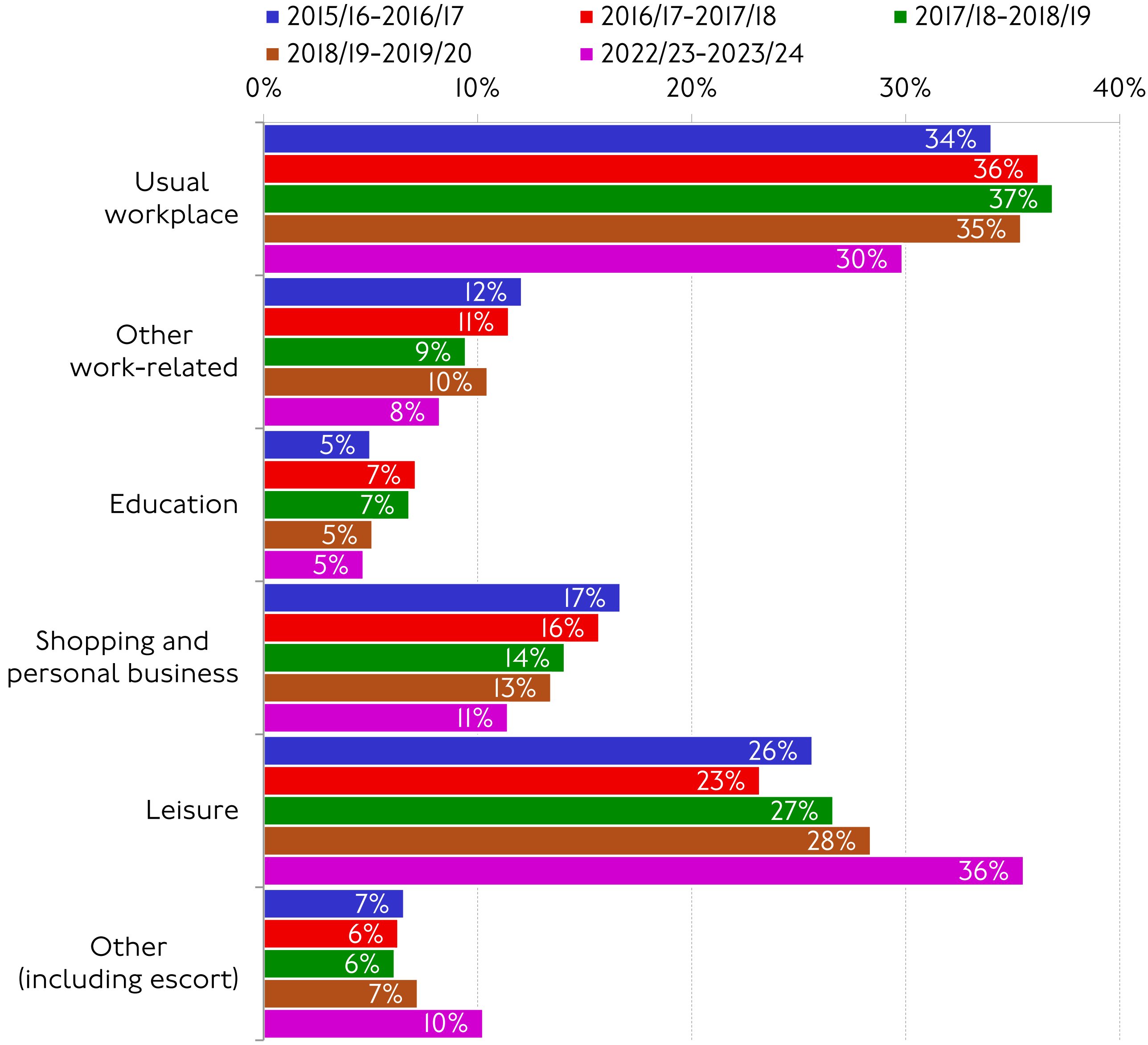
| **Sociodemographic attribute** | **Group** | **People who cycled at least once in the last year in 2022/23-2023/24** | **LTDS full sample in 2022/23-2023/24** |
|---|---|---|---|
| Gender | Men | 62% | 50% |
| | Women | 38% | 50% |
| Age | 5-16 | 19% | 16% |
| | 17-24 | 9% | 11% |
| | 25-44 | 42% | 36% |
| | 45-64 | 25% | 24% |
| | Over 65 | 4% | 13% |
| Ethnicity | White | 73% | 60% |
| | Asian | 14% | 23% |
| | Black | 8% | 13% |
| | Other ethnic groups | 6% | 4% |
| Disability status | Disabled | 2% | 8% |
| | Not disabled | 98% | 92% |
| Household income | Under £20k | 10% | 17% |
| | £20k-£75k | 48% | 52% |
| | Over £75k | 42% | 31% |
| Working status | Not working | 18% | 34% |
| | Working | 82% | 66% |

Source: TfL Strategic Analysis, Customer & Strategy.
Note: For all sociodemographic categories except work status the base is all LTDS respondents (that is, London residents aged five and over). For work status the base is those of working age (London residents aged 17 and over).

### Cycling by journey purpose

Figure 6 shows the distribution of journey purposes among London residents' cycle trips and how this has changed over the last few years. Since there are only two years of post-pandemic data, this is shown in two-year moving averages.

Figure 6 Proportion of London residents' cycling trips by journey purpose, LTDS, two-year moving averages, 2015/16-2023/24.




Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

Key features are:

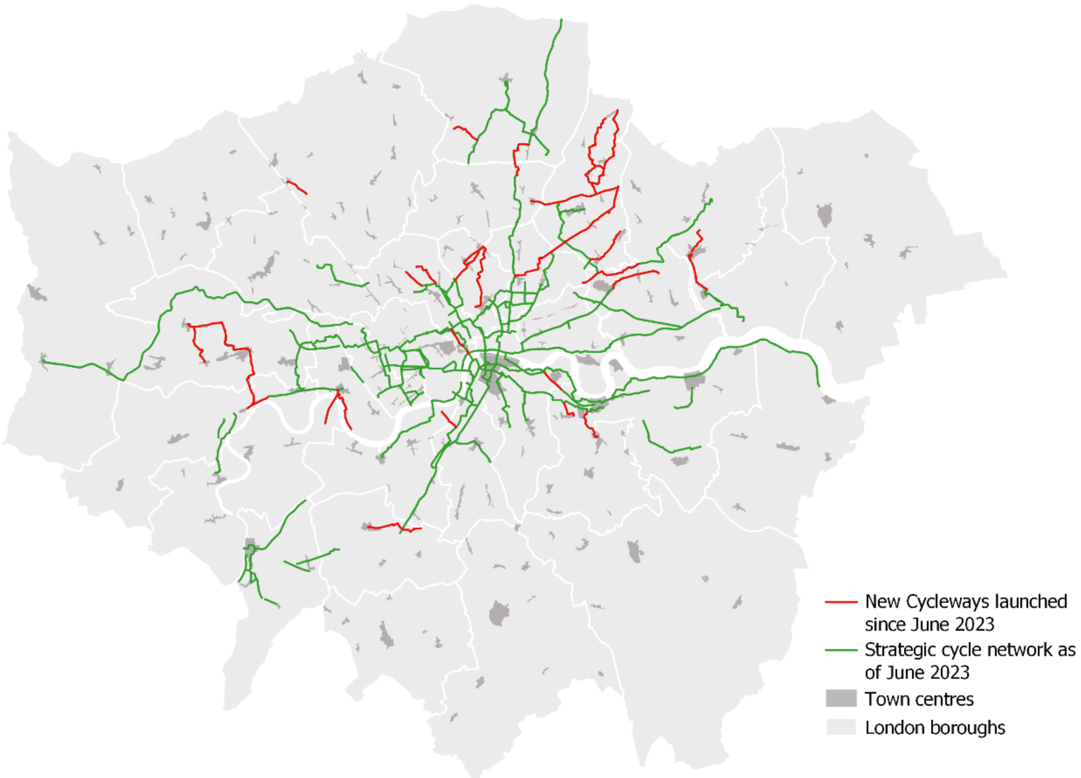
- After the coronavirus pandemic, the proportion of work-related cycling (either to the usual workplace or other work-related) decreased substantially, while the relative share of cycling trips for leisure and other purposes increased. This likely responds to an increase in cycling for leisure purposes catalysed by the resurgence of cycling during and after the pandemic as well as a relative reduction in the number of work-related trips observed on all modes over this period.
- The proportion of cycling trips for education has been decreasing over the last few years, albeit by relatively little and from a low base.
- However, in recent years there has been a steady and substantial decrease in the proportion of cycling trips for shopping or personal business. This is in line with the decline in trip rates for shopping or personal business observed overall (regardless of mode of transport).

## London's cycle network

Expanding the Cycleway network is essential for cycling to become an attractive option for all Londoners and the Cycling Action Plan 2 set an ambitious target for 40 per cent of Londoners to live within 400 metres of the strategic cycle network by 2030.

We made good progress towards this aim in 2023/24, launching 20 new Cycleway routes connecting over 600,000 Londoners to the network. Working with the boroughs, we increased the total length of network from 90 kilometres in 2016 to 403 kilometres in September 2024 (figure 7). This means that, as of September 2024, 27 per cent of Londoners lived within 400 metres of the strategic cycle network, up 3 percentage points (from 24 per cent) in autumn 2023 and from an estimated five per cent in 2016 (up by 22 percentage points).

Figure 7 London's strategic cycle network, September 2024.




Source: TfL Customer & Strategy.

# Walking

Approximately 37 per cent of all trips (six million trips) made by London residents each day are done entirely on foot. Furthermore, 14.5 million walking journey stages are made as part of multi-modal trips by London residents every day. This makes walking the most common way of moving around the capital.

In this context, trips are defined as one-way movements between an origin and a destination for a given purpose. Trips can be completed using several modes of transport (for example, cycling to a rail station, taking a train and then walking to the final destination), and each of those parts of a trip by a single mode is called a journey stage.

However, walking (or more generally pedestrian activity) is broader than these definitions and not all walking fits into the framework of trips and stages. TfL therefore uses a variety of complementary monitoring approaches to understand the various aspects of walking behaviour in London. These are discussed in the following sections.

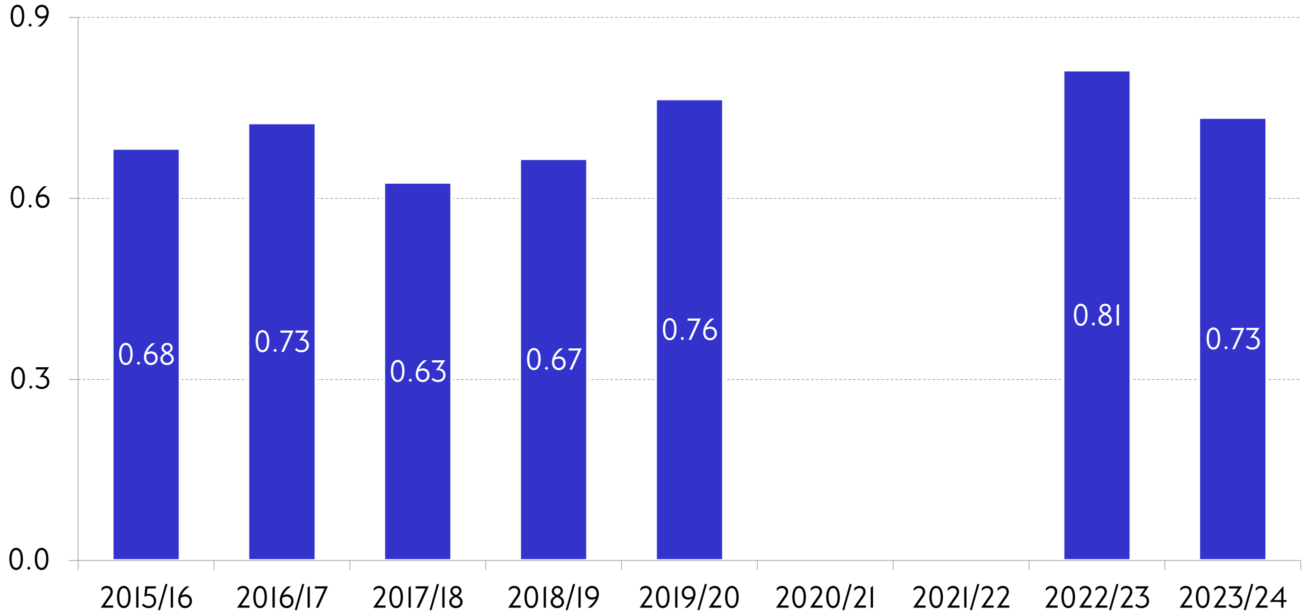
## Walking by London residents

The London Travel Demand Survey (LTDS) allows us to estimate daily walking (all the way) trip rates across different sociodemographic groups as well as to explore the main purposes of walking journeys in London.

**Overall walking (all the way) trip rates**

The daily trip rate is the average number of trips made by a person on an average day. Trip rates are useful indicators of demand and can be calculated for different modes and sociodemographic groups. Figure 8 shows the change in the overall walking (all the way) trip rate of London residents (aged five and over) between 2015/16 and 2023/24.

Figure 8 Walking trips per person per day by London residents, LTDS, 2015/16-2023/24.




Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

Between 2015/16 and 2019/20 the walking (all the way) trip rate fluctuated from a low of 0.63 trips per person per day in 2017/18 to a high of 0.76 trips per person per day in 2019/20.

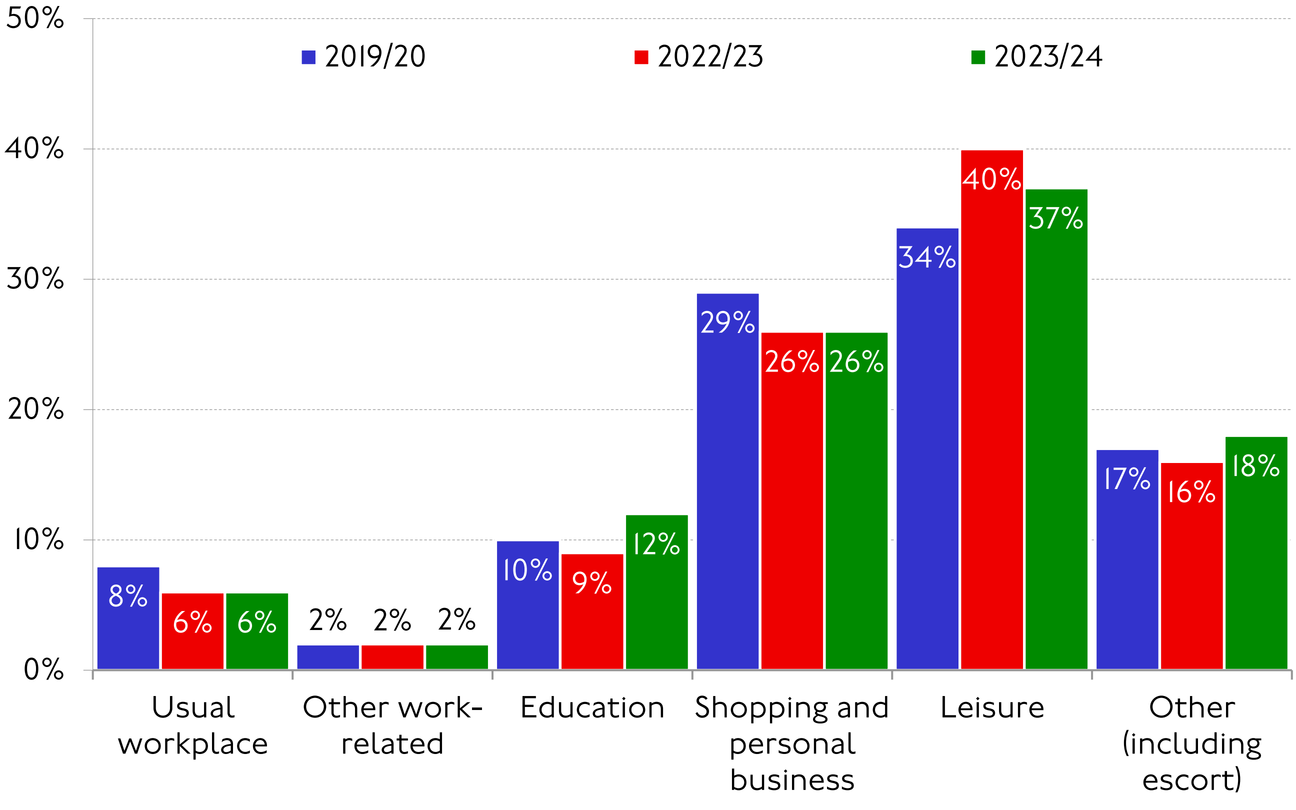
During and right after the pandemic, walking (all the way) trips increased as London residents were discouraged from using other modes and tended to make shorter, more local journeys, with walking trip rates reaching 0.81 trips per person per day in 2022/23.

In 2023/24, however, the trip rate dropped by 10 per cent (relative to 2022/23) to 0.73 trips per person per day, a level similar to 2016/17 and slightly below the trip rate immediately before the pandemic in 2019/20 (0.76 trips per person per day). This probably reflects a post-pandemic readjustment to a more 'normal' level of walking, albeit remaining still higher than several of the pre-pandemic years.

**Walking by journey purpose**

Figure 9 shows the trend in the purpose of walking (all the way) trips by London residents in recent years. It should be noted that in addition to this there is a large amount of walking that takes place in multi-modal trips (where there are one or several walking journey stages) which may be undertaken for a variety of purposes.

Figure 9 Proportion of London residents' walking trips, by journey purpose, LTDS, 2019/20, 2022/23 and 2023/24.




Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

In 2023/24 most walking (all the way) trips were for leisure and shopping or personal business: 37 and 26 per cent, respectively. Since 2019/20, the proportion of walking (all the way) trips for shopping or personal business decreased by three percentage points, while the proportion for leisure increased by three percentage points. Education trips also saw a notable increase (of two percentage points). Only eight per cent of walking (all the way) trips were for work-related purposes in 2023/24, two percentage points down on 2019/20.

## Pedestrian activity in central London

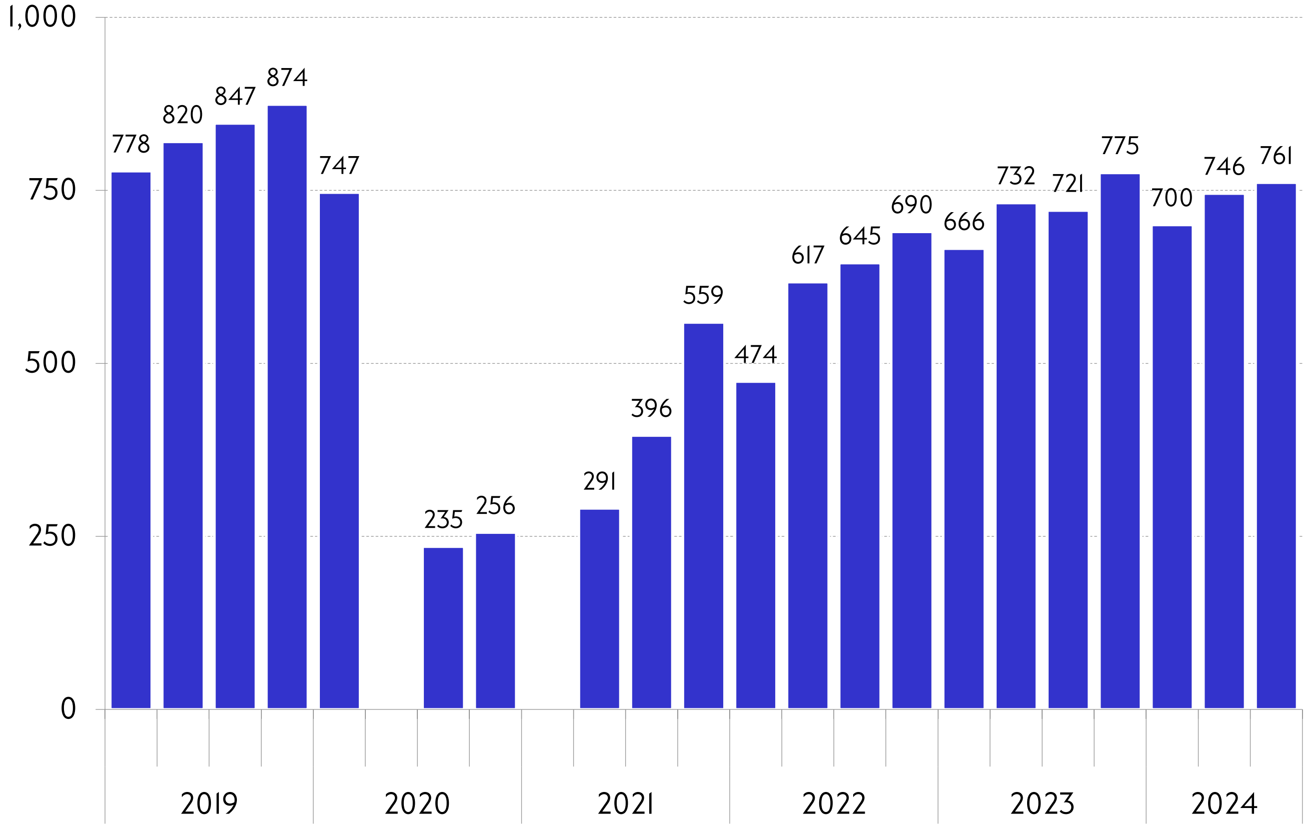
The previous section explored the trends in walking (all the way) trips as captured by the LTDS. However, not all walking can be framed in terms of trips and journey stages and there are ways to monitor walking activity that do not use this framework. It is important to note, however, that none of those other ways of measuring walking currently available to us are 'ideal' from the point of view of being comprehensive of all people who walk in London – including visitors – for all possible reasons. Even when 'good' measures are theoretically possible, they require such intensive sampling that they are statistically out of scope. Therefore, we do not and cannot provide a value for 'walking' at the London-wide level other than the trips-based measure reported above, which also feeds our overall mode share estimates.

However, at the much more spatially contained central London level (defined as the Congestion Charge zone), we have since 2019 a pedestrian activity (or footfall) survey that provides a quarterly measure of walking flows in central London. This survey uses a comprehensive set of point-based counts across some 600 locations that together make up an efficiently structured sample of central London which can further be disaggregated spatially. Key trends from this survey are presented in this section.

### Pedestrian activity over time

Figure 10 shows the quarterly trend in average hourly pedestrian flow across all sites since the beginning of the survey.

Figure 10 Average hourly pedestrian flow (persons per hour per site) in central London, by quarter, quarter 1 2019 (Jan-Mar)-quarter 3 2024 (Jul-Sep).




Source: TfL Strategic Analysis, Customer & Strategy.
Note: Data from some quarters is missing due to the impacts of the coronavirus pandemic.

Before the pandemic, pedestrian activity in central London was broadly seasonal, with activity increasing through the year and peaking in the quarter from October to December.

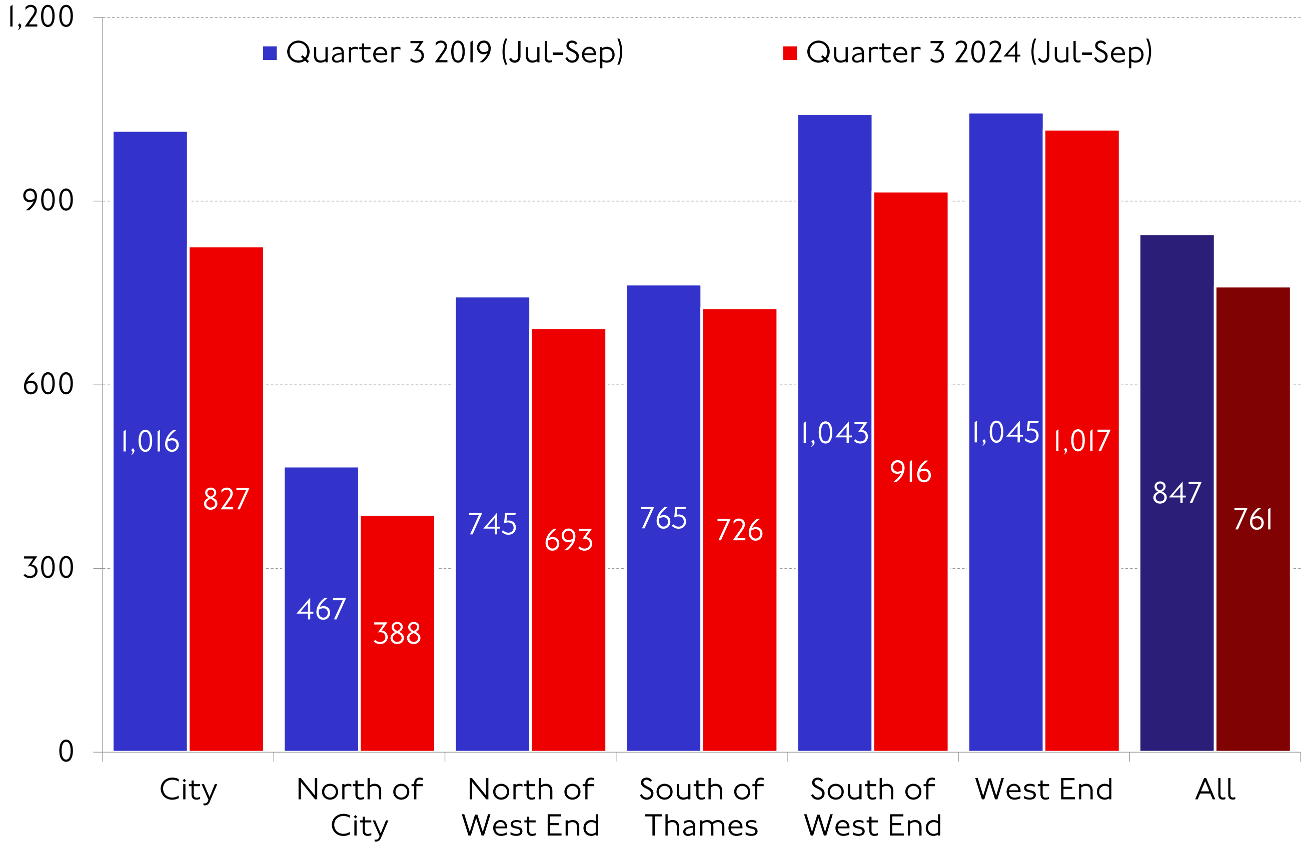
In 2020, pedestrian activity fell by over 70 per cent, with a slow recovery from the pandemic starting in 2021. The recovery continued into 2022, although at a slower rate, with pedestrian activity remaining more than 25 per cent lower than in 2019. A similar trend was seen during 2023, with a slowing down of the post-pandemic recovery and activity in central London around 13 per cent lower than in 2019.

Pedestrian activity continued to increase gradually in 2024, with the first three quarters of the year cumulatively showing a four per cent increase in pedestrian flows compared with the same quarters in 2023. However, this growth was much lower than the growth in 2023. Pedestrian flows remained lower than before the pandemic, at around 90 per cent of 2019 levels in the latest available quarter (July to September 2024). This is similar to the trend seen in public transport patronage, with both bus and London Underground demand at a similar level below 2019 levels. This could reflect the impact of hybrid working patterns or the uncertain economic outlook resulting in fewer discretionary trips into central London for shopping or leisure purposes.

### Pedestrian activity by area

The stratification of the pedestrian activity survey enables comparisons of the different areas within central London, as shown in figure 11.

Figure 11 Average hourly pedestrian flow (persons per hour per site) in central London, by area, quarter 3 2019 (Jul-Sep) versus quarter 3 2024 (Jul-Sep).




Source: TfL Strategic Analysis, Customer & Strategy.

The recovery in pedestrian activity has not been even across central London. Some areas, particularly those that have traditionally been destinations for leisure or shopping trips, are much closer to pre-pandemic levels than others. In quarter 3 2024 (July to September), pedestrian flows in the West End were only three per cent lower than in the same quarter of 2019 and flows in the area south of the Thames only five per cent lower. In contrast, those areas that are more typically visited for work purposes have experienced a slower recovery. For example, in quarter 3 2024 (July to September), pedestrian activity in the City was still 19 per cent lower than in the same quarter of 2019.

## Indicative pedestrian activity trends across London

Since 2022 our annual, strategic active travel counts programme (comprising a panel of more than 1,400 locations across London surveyed every year in spring) includes pedestrian flows. Although this panel was originally designed for cycle counts and is therefore only representative of the cyclable network (and not necessarily the walkable network), the year-on-year consistency in the data collection makes these pedestrian counts another potentially useful source of estimates of walking activity.

Similarly to the central London pedestrian activity presented above, this dataset does not use the trips/stages framework and instead looks at all observed pedestrian flows. However, unlike the central London survey, it does not stem from a representative sample of count locations and cannot therefore provide absolute values of pedestrian activity. It can, however, be used as an indicator of relative change at the aggregate level and on the basis of this particular sample of sites.

Table 2 shows the change in pedestrian flows by area of London between each of the years for which data for the strategic active travel counts is available (2022 to 2024). For central London only, the equivalent results from the central London pedestrian activity survey are also provided for comparison.

Table 2 Change in pedestrian flows by area, pedestrian activity survey versus strategic active travel counts, all year combinations in 2022-2024.

| Period | Pedestrian survey (central) | Strategic counts (central) | Strategic counts (inner) | Strategic counts (outer) | Strategic counts (all London) |
|---|---|---|---|---|---|
| 2022 to 2023 | 18.5% | 13.5% | 7.2% | 3.4% | 9.5% |
| 2023 to 2024 | 1.9% | 0.4% | -3.0% | 0.1% | -1.0% |
| 2022 to 2024 | 20.7% | 14.0% | 3.9% | 3.5% | 8.4% |

Source: TfL Strategic Analysis, Customer & Strategy.
Note: The data from the central London pedestrian activity survey stems from quarter 2 (April to June) of each year, while the data from the strategic active travel counts is collected in a wider and more loosely defined spring window (April to July).

The strategic active travel counts suggest that between 2023 and 2024 there was a small reduction (of around one per cent) in pedestrian activity in London as a whole. This seems to have been largely driven by a three per cent decrease in pedestrian activity in inner London, with very little change (of less than one per cent, albeit towards an increase) in pedestrian activity in central and outer London.

On the other hand, the central London pedestrian activity survey suggests almost a two per cent increase in central London between 2023 and 2024.

Although neither dataset is perfect, they provide broadly comparable results at the central London level, where they overlap. The strategic active travel counts thus seem to have the potential to act as a reasonable proxy indicator for pedestrian activity beyond the central area (not covered by the other dataset). We will therefore continue to monitor this novel dataset and provide indicative results of change in the future.

# Physical activity and travel

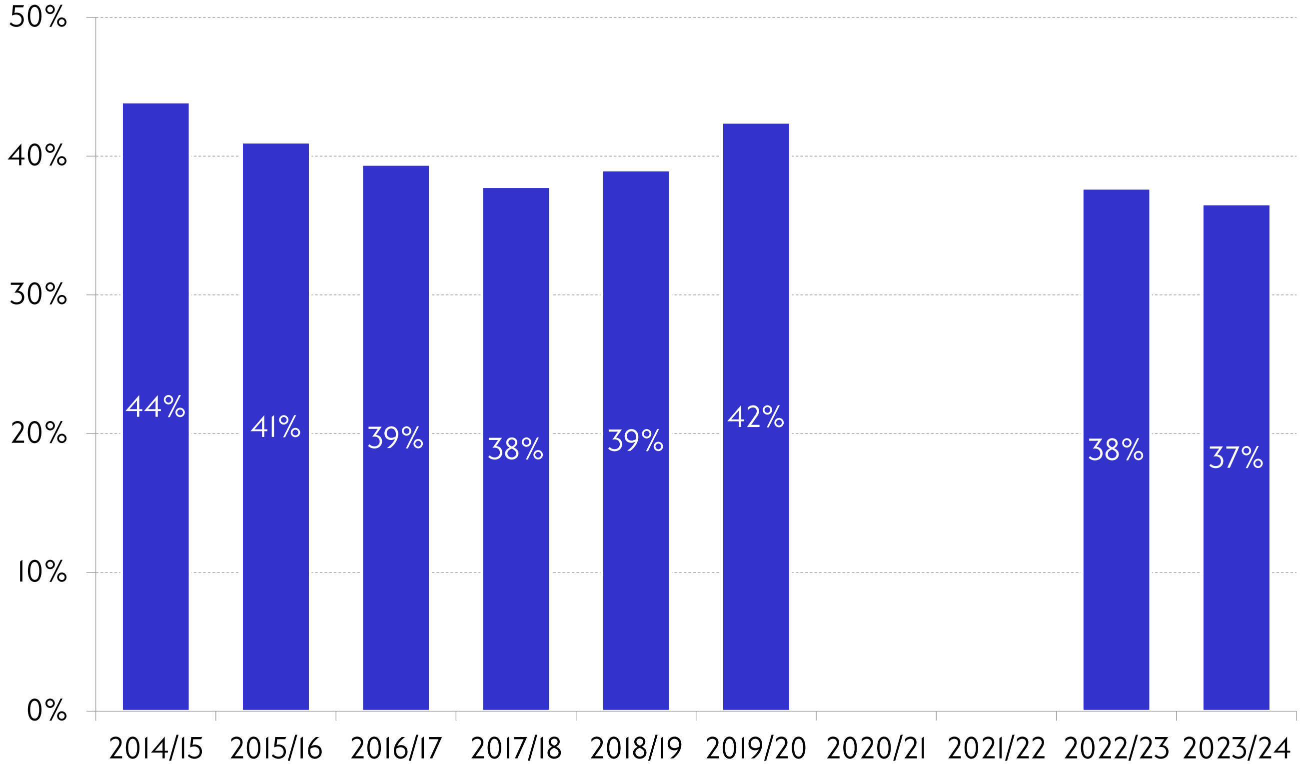
Building physical activity into the daily travel routine is a powerful way to increase everyday physical activity overall. To promote the health of Londoners, the Mayor's Transport Strategy set a goal for all London residents to undertake at least 20 minutes of active travel per day by 2041, defined as either walking or cycling. By measuring the number of London residents who report doing at least 20 minutes of walking or cycling we can show how many are achieving minimum healthy levels of activity through active travel alone. Note, however, that this does not include other forms of physical activity, such as sport, which are additional to this measure.

The LTDS offers the best available data source on active travel in London, giving a daily snapshot of travel behaviour by London residents, and so it is the chosen source to monitor our progress on this ambition. However, we acknowledge that a proportion of London residents who are routinely active may not have travelled on the LTDS travel day (typically the day before the survey interview). Therefore, the Mayor's Transport Strategy aim for all London residents translates to 70 per cent of the LTDS sample of London residents achieving 20 minutes of active travel on the day they were surveyed.

## Overall physical activity trend

Figure 12 shows the historic trend of achievement of the active travel target for London residents aged 20 and over.

Figure 12 Proportion of London residents aged 20 and over who undertook at least 20 minutes of active travel per day, LTDS, 2014/15-2023/24.



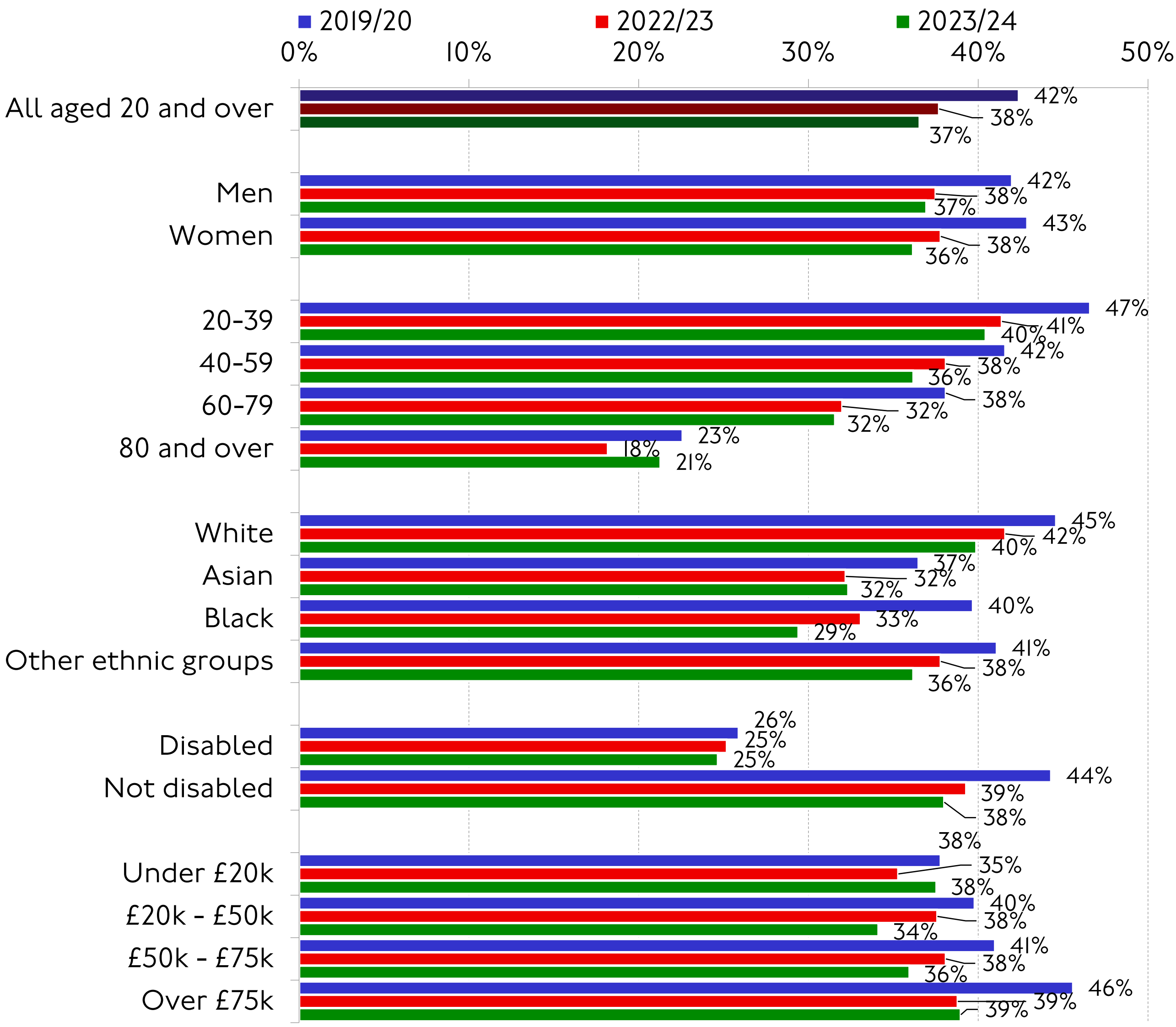

Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

After some years of decline between 2014/15 and 2017/18, this measure was increasing just before the pandemic (until 2019/20). In 2022/23, it dropped to 38 per cent, despite the use of active modes being higher than it was before the pandemic (reflecting lower mobility in general during the pandemic). In 2023/24, however, the proportion of London residents meeting the target decreased again from the previous year (by 1.1 percentage points) to 37 per cent. This was likely due to a decline in the walking (all the way) trip rate and the continuing shortfall in the post-pandemic recovery on public transport use, where intermediate walking journey stages are often made as part of longer trips where public transport is the main mode.

## Physical activity by sociodemographic group

The achievement of the active travel target by London residents can be broken down by sociodemographic characteristics (figure 13).

Figure 13 Sociodemographic profile of London residents aged 20 and over who undertook at least 20 minutes of active travel per day, LTDS, 2019/20, 2022/23 and 2023/24.




Source: TfL Strategic Analysis, Customer & Strategy.

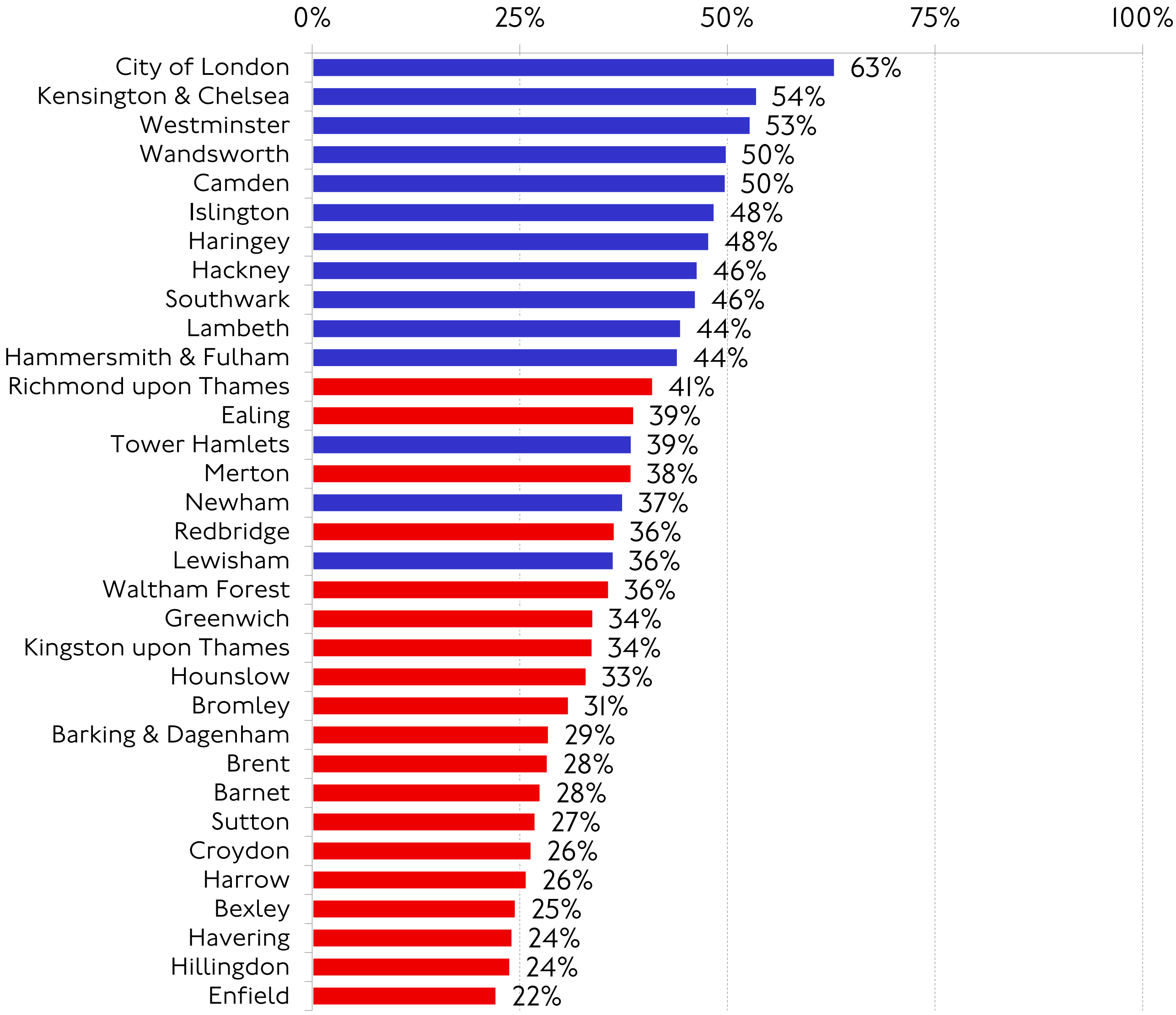
Key features are:

- There was little difference by gender, with 37 per cent of men and 36 per cent of women doing 20 minutes of active travel in 2023/24.
- Younger residents were more likely to meet the target, with 40 per cent of those aged 20-39 doing so in 2023/24 compared to 21 per cent of those aged 80 and over.
- The proportion of residents meeting the target also varied by ethnicity, with 40 per cent of White residents, 32 per cent of Asian residents and 29 per cent of Black residents meeting the target in 2023/24.
- London residents living in households with incomes over £75k were most likely to meet the target (39 per cent versus 34 to 36 per cent among other groups).

## Physical activity by borough

Finally, it is useful to look at the achievement of the active target by borough (figure 14).

Figure 14 Proportion of London residents aged 20 and over who achieved at least 20 minutes of active travel per day, by borough of residence, LTDS, 2023/24.




Source: TfL Strategic Analysis, Customer & Strategy.

Residents of inner London (blue) were more likely to achieve 20 minutes of active travel per day, particularly in more central boroughs. In 2023/24, more than 50 per cent of residents of the City of London, Kensington & Chelsea and Westminster aged 20 and over undertook at least 20 minutes of active travel.

In outer London (red), residents of Richmond upon Thames were most likely to achieve the target (41 per cent), followed by those from Ealing (39 per cent). In contrast, fewer than 25 per cent of residents of Bexley, Havering and Hillingdon met the active travel target in 2023/24.