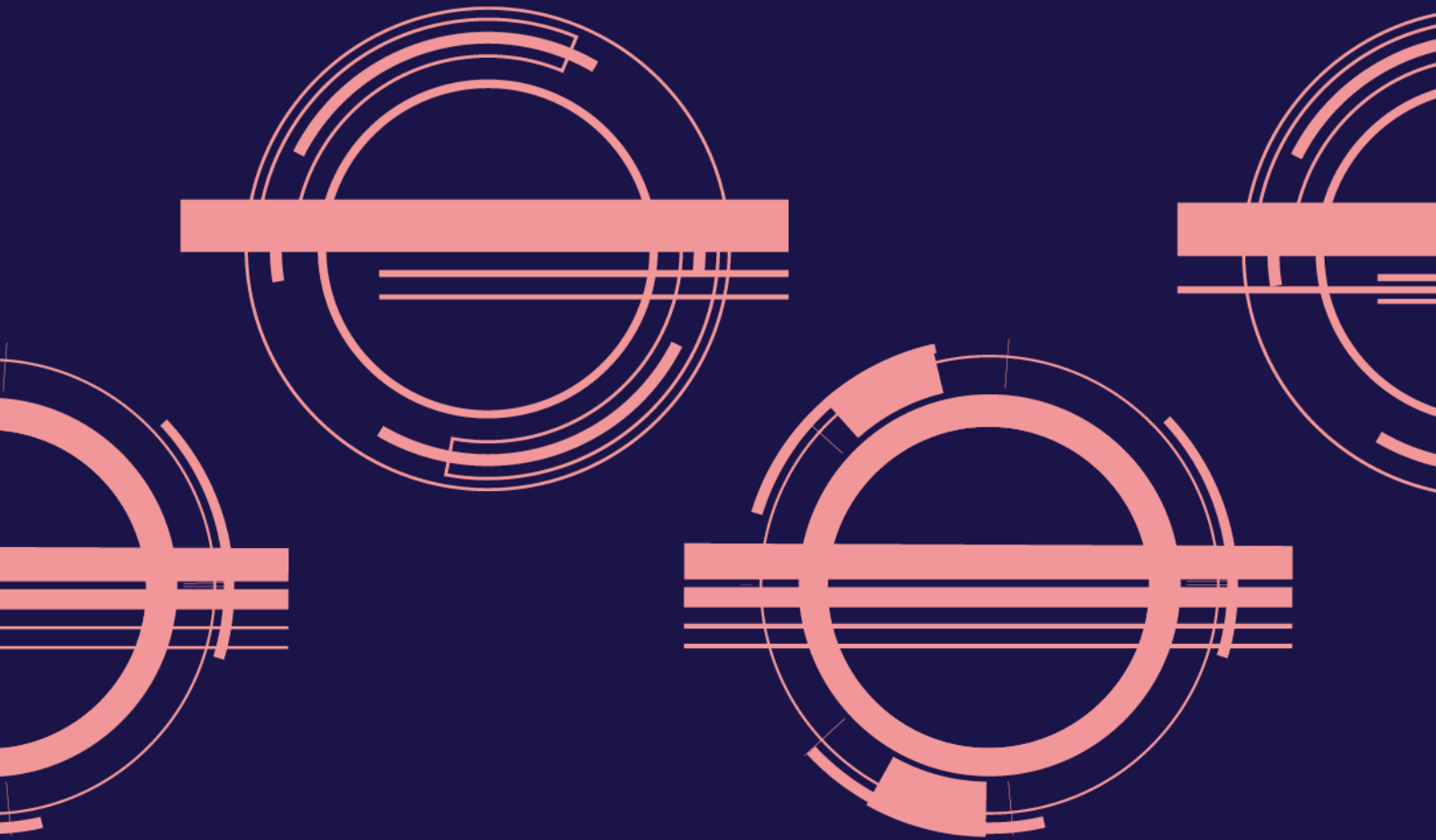


December 2024



# Travel in London 2024

## Consolidated estimates of total travel and mode shares

MAYOR OF LONDON



**TRANSPORT  
FOR LONDON**  
EVERY JOURNEY MATTERS

# Travel in London 2024

## Consolidated estimates of total travel and mode shares

### 2024 update

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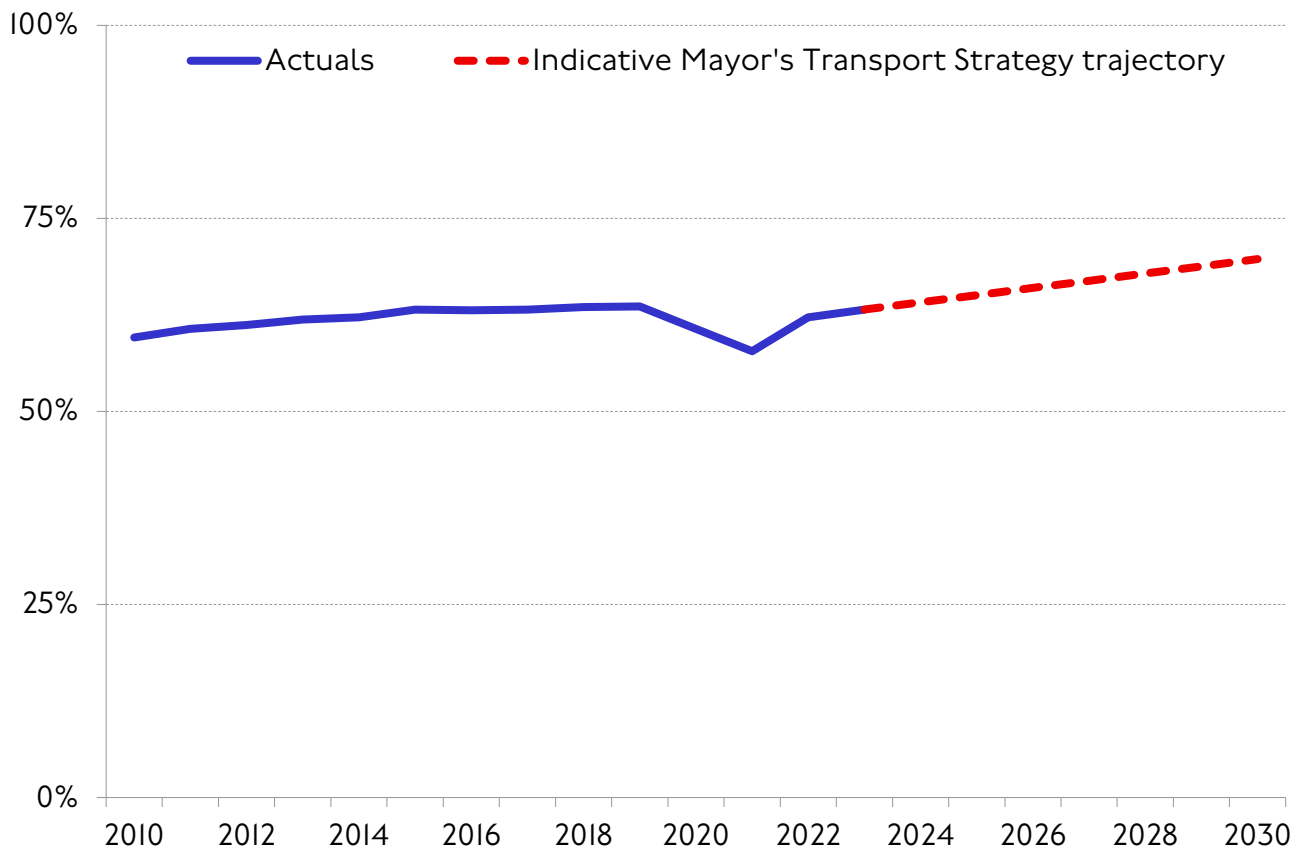
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## Summary of key findings

This report looks at trends in total travel in London and the main factors affecting them over the longer term, including during the coronavirus pandemic and the subsequent demand recovery. This report covers all travel in London, including residents, commuters and visitors.

- Despite continued growth in demand on most modes since the pandemic, overall travel demand remains short of pre-pandemic levels, particularly on public transport.
- In 2023 there were an estimated 26.1 million daily trips on an average day (seven-day week), an increase of six per cent on 2022. However, this was five per cent lower than in 2019 before the pandemic.
- Daily journey stages in London in 2023 were 29.5 million, up from 27.9 million in 2022 (a six per cent increase) but eight per cent lower than the 2019 pre-pandemic level.
- In 2023, the active, efficient and sustainable mode share for all travel in London increased by one percentage point, relative to 2022, to 63.2 per cent (figure I). Despite this increase, it remained lower than the 2019 pre-pandemic value of 63.6 per cent.

Figure I Active, efficient and sustainable trip-based mode share, 2010-2030.



Source: TfL Strategic Analysis, Customer & Strategy.

- The post-pandemic trend in this measure reflects the ongoing shortfall in public transport trips relative to before the pandemic. London's slower than expected population growth is also a factor: the 2021 census found the population to be two per cent lower than contemporary mid-year estimates.

- Trips by active modes (walking and cycling) have, however, increased in absolute terms since the pandemic.
- Both walk and cycle mode shares remained higher than before the pandemic, with 26 per cent of all trips in 2023 being walk trips. Cycle mode share was 4.5 per cent in 2023, up from 3.6 per cent in 2019.
- Despite the continued recovery in public transport demand in 2023, the pandemic legacy of lower overall demand for public transport is affecting progress towards the Mayor's aim for 80 per cent of all trips in London to be made by active, efficient and sustainable modes by 2041.
- After two years of falls in the London population, 2023 marked the second year of growth, with a 0.9 per cent increase on 2022. However, London's population was just 0.6 per cent higher than in 2019.
- The growth in London's population was mainly driven by natural change, with international flows into London balanced out by large flows of London residents to other parts of the country.
- Evolutionary changes to London's population structure, revealed by the 2021 census, could also partially explain past travel trends, with ongoing implications for the future as different groups tend to travel in different ways. Although still a comparatively 'young' city in population terms, over the last decade London's population has become relatively older, and the number of women has increased relative to the number of men.
- This could affect overall travel demand patterns, since the highest trip rates tend to be among those aged 25 to 44, while those aged 65 and over have some of the lowest trip rates. Men tend to make more rail- and car-based trips, while women tend to use the bus and walk more.
- London's economy remains subdued in historic terms, with relatively low growth. Cost-of-living pressures on discretionary spending are in turn affecting travel. Coupled with a continuing legacy of increased hybrid working after the pandemic, these factors will negatively affect current travel demand and prospects for future growth. However, jobs bounced back strongly from the pandemic, and, despite relatively pessimistic official forecasts, indices of consumer confidence are marginally positive.

For more information about any of the items featured in this report please contact [TiLEnquiries@tfl.gov.uk](mailto:TiLEnquiries@tfl.gov.uk).

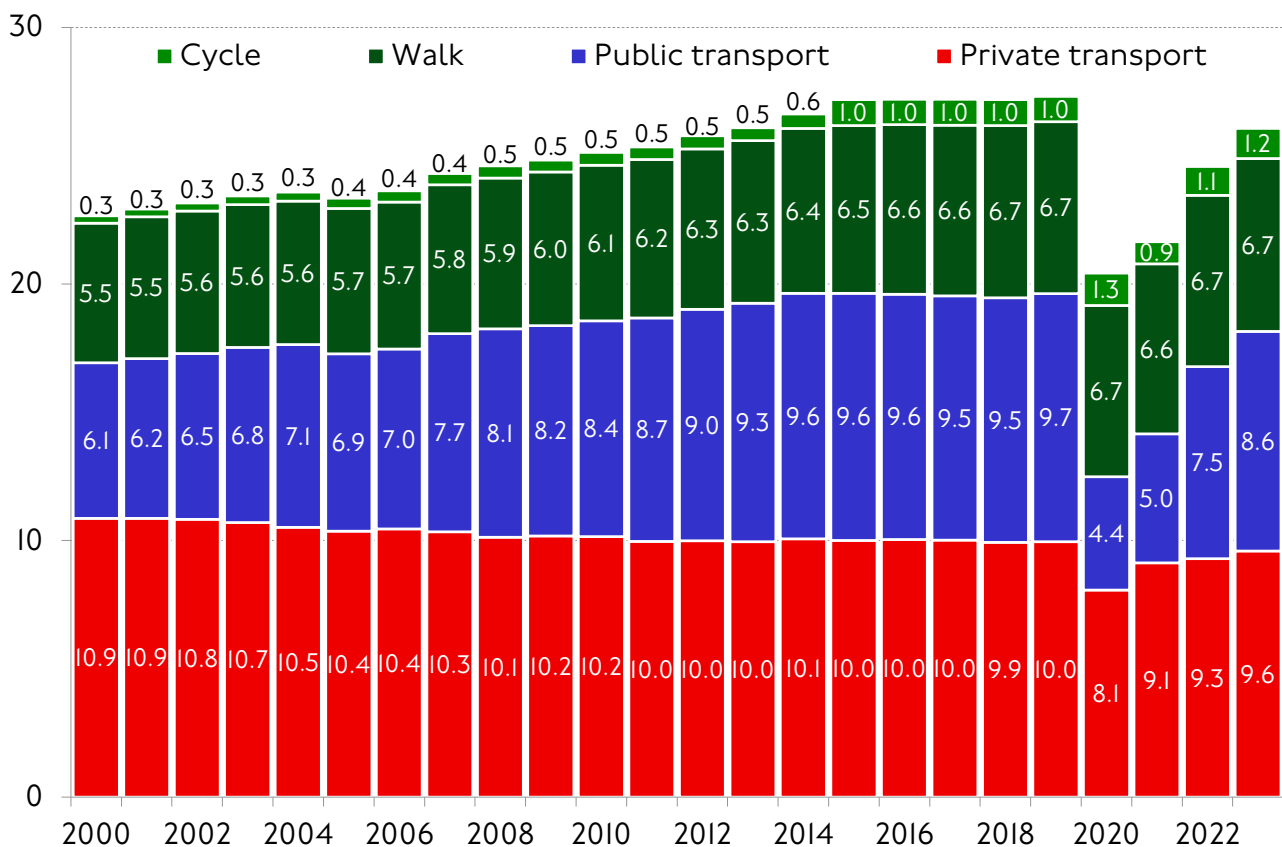
# Consolidated estimates of travel demand

## Total travel (trip) estimates

Between 2000 and 2019 total trips in London increased by 21 per cent, with particularly notable increases in public transport trips alongside strong increases in cycling demand. Included in these totals are all trips with an origin, a destination, or both in Greater London, by London residents and non-residents, including commuters and day visitors from outside London as well as overnight visitors and tourists (figure 2 and table I).

From 2015 onwards, however, there was a general slowing down of travel demand growth in London, with a net increase in trips of just 0.5 per cent between 2015 and 2019 compared with an estimated population increase of three per cent over the same period. This suggests that the pre-pandemic trend was for people to make fewer trips per day, on average, mirroring the trend seen among London residents only from our London Travel Demand Survey.

Figure 2 Estimated daily trips (in millions) by mode, seven-day week average, 2000-2023.



Source: TfL Strategic Analysis, Customer & Strategy.  
 Note: The method used to estimate cycle trips changed in 2015.

In 2023 there were an estimated 26.1 million trips on an average day (seven-day week), an increase of six per cent on 2022. This reflects a slow-down in the recovery from the pandemic, with travel demand still five per cent lower than in 2019. This could suggest that the recovery from the pandemic peaked in 2023, with people in London making fewer trips on average than before the pandemic. Slow population growth may also have

contributed to this, with London’s population increasing by just 0.6 per cent between 2019 and 2023.

**Table 1** Estimated daily trips (in millions) by main mode of travel, seven-day week average, 2000 and 2013-2023.

Year	NR/ LO	LU	Bus/ tram	Taxi/ PHV	Car driver	Car passenger	Motor- cycle	Cycle <sup>1</sup>	Walk	All
(2000)	(1.7)	(2.0)	(2.4)	(0.3)	(6.8)	(3.6)	(0.2)	(0.3)	(5.5)	<b>(22.7)</b>
2013	2.7	2.5	4.1	0.3	5.8	3.6	0.2	0.5	6.3	<b>26.1</b>
2014	2.8	2.6	4.1	0.3	5.9	3.7	0.2	0.6	6.4	<b>26.6</b>
2015	3.0	2.8	3.8	0.3	5.9	3.6	0.2	1.0	6.5	<b>27.2</b>
2016	3.0	2.8	3.7	0.4	5.8	3.6	0.2	1.0	6.6	<b>27.2</b>
2017	2.9	2.8	3.8	0.4	5.8	3.7	0.2	1.0	6.6	<b>27.2</b>
2018	3.0	2.8	3.7	0.4	5.8	3.6	0.2	1.0	6.7	<b>27.2</b>
2019	3.1	2.9	3.7	0.4	5.8	3.6	0.2	1.0	6.7	<b>27.3</b>
2020	1.2	1.2	2.0	0.2	4.7	2.9	0.2	1.3	6.7	<b>20.4</b>
2021	1.3	1.4	2.3	0.2	5.3	3.3	0.3	0.9	6.6	<b>21.7</b>
2022	2.2	2.2	3.1	0.2	5.4	3.3	0.3	1.1	6.7	<b>24.6</b>
2023	2.6	2.6	3.4	0.2	5.6	3.5	0.3	1.2	6.7	<b>26.1</b>
Change (%) 2000-2023	56.9	29.8	39.9	-21.7	-18.0	-3.3	66.7	n/a <sup>1</sup>	23.6	<b>15.1</b>
Change (%) 2013-2023	-2.4	3.2	-18.2	-32.1	-4.3	-4.4	94.7	n/a <sup>1</sup>	6.3	<b>-0.1</b>
Change (%) 2022-2023	19.6	16.2	9.6	0.1	2.5	4.6	4.3	4.8	0.9	<b>6.1</b>

Source: TfL Strategic Analysis, Customer & Strategy.

Notes: Trips are complete one-way movements. They may include several modes and journey stages but are classified by the mode that is typically used for the longest distance. Round trips are counted as two trips: an outward and an inward leg.

1: The method used to estimate cycle trips changed in 2015. Therefore, it is not possible to calculate change across the series break.

Looking at individual modes, the biggest increases in 2023 relative to 2022 were on public transport modes, particularly on National Rail/London Overground (19.6 per cent) and London Underground (16.2 per cent). This was partly driven by the full opening of the Elizabeth line. Bus demand also increased, with 9.6 per cent more trips than in 2022. Car driver trips increased, albeit by just 2.5 per cent. This lower level of growth is partly due to an earlier and quicker recovery of road traffic from the coronavirus pandemic.

Despite this increase in public transport trips in 2023, overall travel demand appears to be plateauing below pre-pandemic levels. In 2023, National Rail/London Overground and London Underground trips were around 15 per cent and 12 per cent below pre-pandemic levels, respectively, while bus trips were nine per cent lower than in 2019. In contrast, car driver trips were three per cent below 2019 levels, with overall travel demand around five per cent lower than in 2019. Since population growth in London was only 0.6 per cent

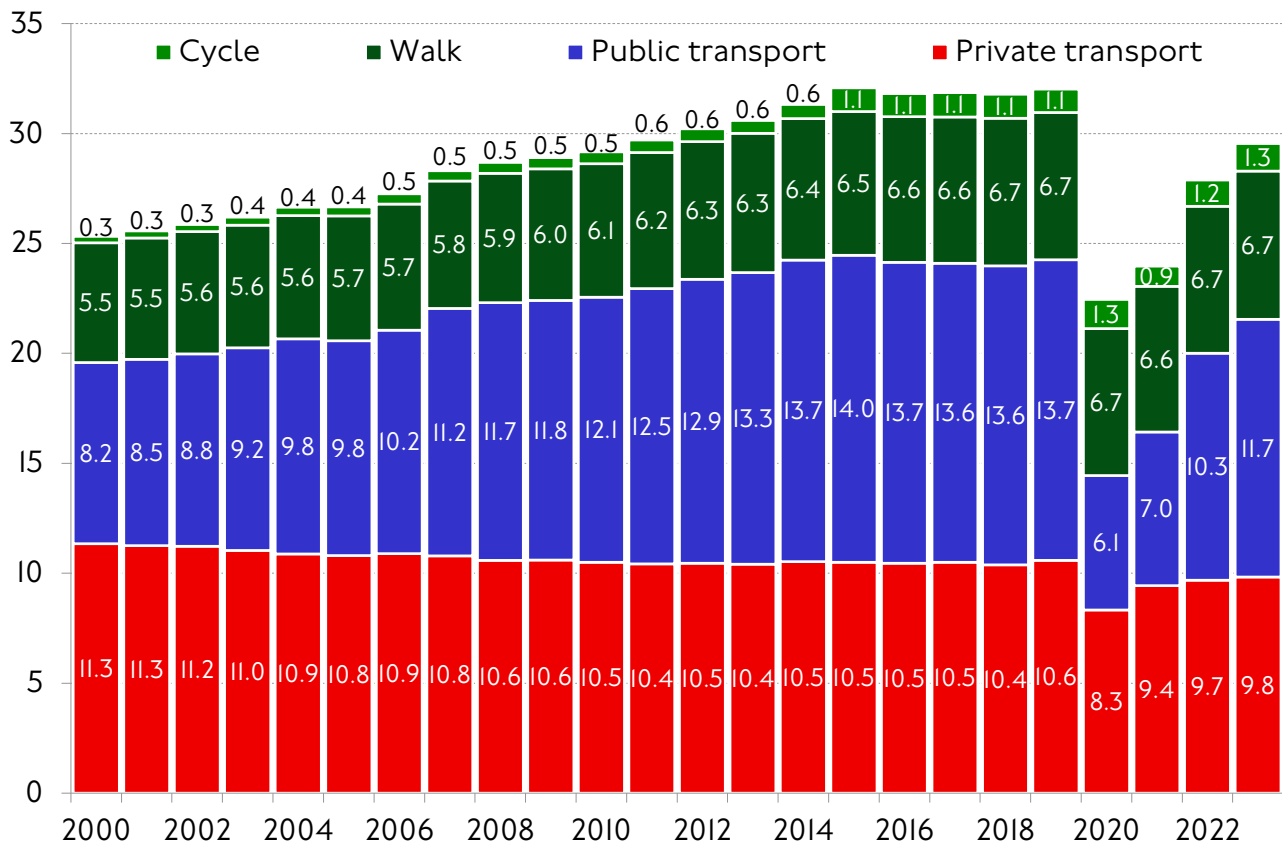
since 2019, this suggests that, overall, people travelling in London are making fewer trips on average than they did before the pandemic.

### Journey stages

Journey stages are the component parts of trips made by each mode. In 2023 there were an estimated 29.5 million journey stages in London, up from 27.9 million in 2022 (a six per cent increase) but eight per cent lower than in 2019 before the pandemic. Table 2, figure 3 and figure 4 show the historic trend in total travel at the journey stage level.

Until 2019 there was a steady increase in journey stages (26 per cent from 2000), but this growth started to plateau in 2015. Over the same period, stages on National Rail were up by 90 per cent and on bus by 64 per cent, despite a fall in patronage in more recent years.

Figure 3 Estimated daily journey stages (in millions) by mode, seven day-week average, 2000-2023.



Source: TfL Strategic Analysis, Customer & Strategy.  
 Note: The method used to estimate cycle journey stages changed in 2015.

In 2023 average daily journey stages increased on almost all modes relative to 2022, with the strongest increases on public transport. There were increases of 16.5 per cent on London Underground, 23.2 per cent on National Rail and 6.6 per cent on buses. Cycle stages also increased by 6.3 per cent. These changes were all lower than those seen between 2021 and 2022 and suggest that the pandemic recovery may have plateaued in 2023.



Table 2 Estimated daily journey stages (in millions) by mode, seven-day week average, 2000 and 2013-2023.

Year	NR/ LO	LU	DLR	Bus/ tram	Taxi/ PHV	Car driver	Car passen- ger	Motor- cycle	Cycle <sup>1</sup>	Walk	All
(2000)	(1.8)	(2.6)	(0.1)	(3.7)	(0.4)	(7.0)	(3.8)	(0.2)	(0.3)	(5.5)	<b>(25.3)</b>
2013	3.1	3.4	0.3	6.5	0.4	6.0	3.8	0.2	0.6	6.3	<b>30.6</b>
2014	3.2	3.5	0.3	6.7	0.4	6.1	3.9	0.2	0.6	6.4	<b>31.3</b>
2015	3.4	3.7	0.3	6.5	0.4	6.0	3.9	0.2	1.1	6.5	<b>32.1</b>
2016	3.4	3.7	0.3	6.2	0.4	6.0	3.8	0.2	1.1	6.6	<b>31.8</b>
2017	3.3	3.7	0.3	6.2	0.5	6.0	3.9	0.2	1.1	6.6	<b>31.9</b>
2018	3.4	3.7	0.3	6.1	0.4	6.0	3.8	0.2	1.1	6.7	<b>31.8</b>
2019	3.5	3.8	0.3	6.1	0.4	6.1	3.9	0.2	1.1	6.7	<b>32.0</b>
2020	1.4	1.4	0.2	3.2	0.2	4.8	3.1	0.2	1.3	6.7	<b>22.5</b>
2021	1.5	1.7	0.2	3.6	0.3	5.4	3.5	0.3	0.9	6.6	<b>24.0</b>
2022	2.5	2.7	0.2	4.8	0.3	5.6	3.5	0.3	1.2	6.7	<b>27.9</b>
2023	3.1	3.2	0.3	5.1	0.3	5.7	3.6	0.3	1.3	6.7	<b>29.5</b>
Change (%) 2000-2023	70.4	21.2	171.4	39.6	-29.9	-19.1	-5.5	68.2	n/a <sup>1</sup>	23.6	<b>16.7</b>
Change (%) 2013-2023	1.9	-6.8	-0.2	-21.0	-36.1	-5.8	-6.8	97.5	n/a <sup>1</sup>	6.3	<b>-3.4</b>
Change (%) 2022-2023	23.2	16.5	12.0	6.6	-1.2	0.9	2.3	5.8	6.3	0.9	<b>6.0</b>

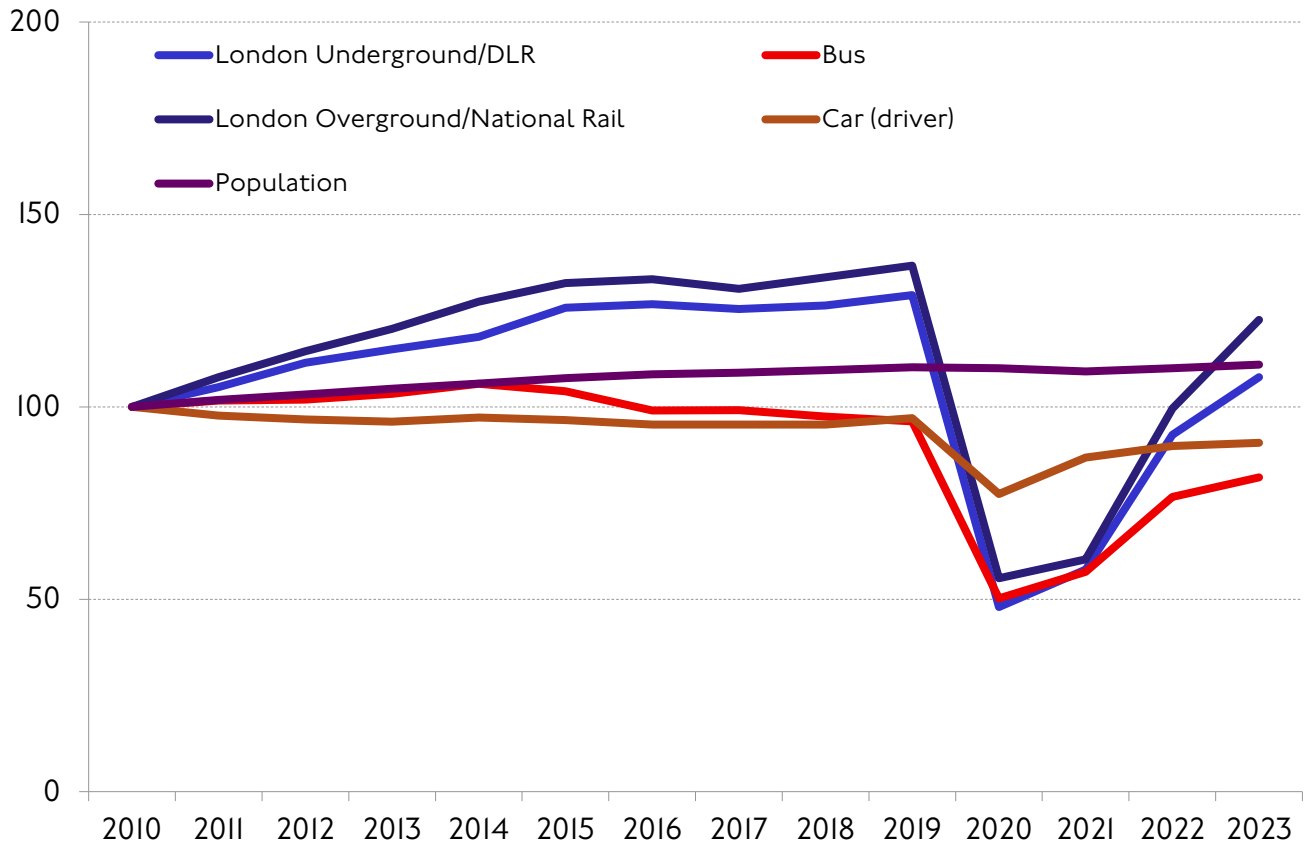
Source: TfL Strategic Analysis, Customer & Strategy.

Note: Journey stages are parts of trips by a single mode. Each rail (but not London Underground) interchange between train operating companies or bus boarding is a new stage. Walks are counted only when they are complete (all-the-way) trips.

1: The method used to estimate cycle journey stages changed in 2015. Therefore, it is not possible to calculate change across the series break.

Figure 4 shows the longer-term trend in journey stages for selected modes, compared with the growth in London’s population.

Figure 4 Change (index: 2010 = 100) in journey stages on selected modes, 2010-2023.



Source: TfL Strategic Analysis, Customer & Strategy.

Until 2019 there was a clear difference between rail-based and road-based modes, with London Underground/DLR and London Overground/National Rail demand increasing at a faster rate than London’s population. In contrast, bus and car demand decreased over the same period.

After the pandemic, however, travel demand recovered more quickly on rail-based modes, with London Overground/National Rail demand in London in 2023 higher than population growth, although the full opening of the Elizabeth line in 2022 will have been a significant contributor to this.

## Mode share estimates

Mode shares reflect the choices that people make for travel given the connectivity provided by transport networks. The Mayor’s aim is for 80 per cent of trips in London to be made by active, efficient and sustainable modes (walking, cycling and public transport) by 2041.

This section looks at historic trends and recent changes to mode shares in terms of trips and journey stages, as well as detail on the active, efficient and sustainable mode share.

### Trip-based mode share estimates

The previous decade saw steady progress in the proportion of travel in London undertaken by active, efficient and sustainable modes (table 3). Public transport accounted for 35.4 per cent of trips in 2019, up from 26.8 per cent in 2000. Private transport (mainly car) accounted for 36.4 per cent of trips in 2019, down from 48.0 per cent in 2000. However, in later years the pace of change slowed, largely reflecting subdued growth or decline in public transport patronage on some modes.

**Table 3** Trip-based mode shares by type of transport, 2000 and 2013-2023.

Year	Public transport	Private transport	Cycle	Walk
(2000)	(26.8%)	(48.0%)	(1.2%)	(24.1%)
2013	35.6%	38.1%	1.9%	24.3%
2014	35.9%	37.8%	2.1%	24.2%
2015	35.4%	36.8%	3.7%	24.0%
2016	35.1%	36.9%	3.6%	24.3%
2017	35.0%	36.8%	3.7%	24.4%
2018	35.1%	36.5%	3.7%	24.7%
2019	35.4%	36.4%	3.6%	24.5%
2020	21.6%	39.5%	6.2%	32.7%
2021	23.2%	42.2%	4.0%	30.6%
2022	30.4%	37.8%	4.5%	27.2%
2023	32.9%	36.8%	4.5%	25.8%

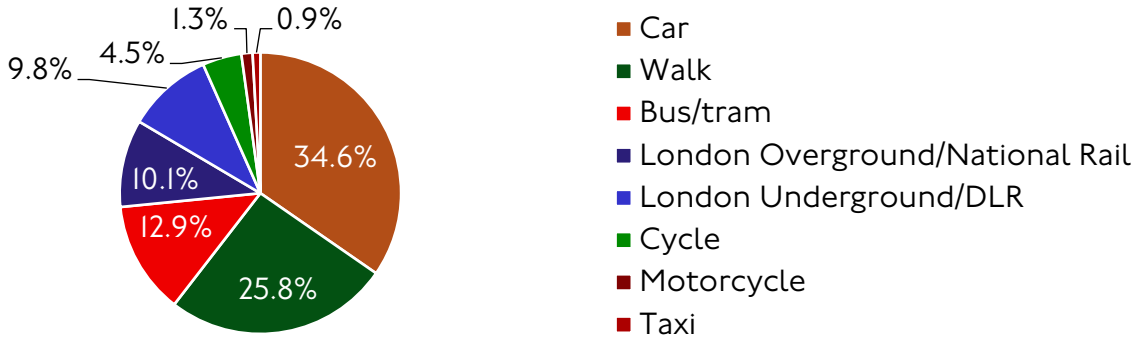
Source: TfL Strategic Analysis, Customer & Strategy.

Note: The method used to estimate cycle trips changed in 2015.

The estimates for 2023 show progress on the recovery of public transport demand, with the public transport mode share increasing from 30.4 per cent to 32.9 per cent, albeit remaining below pre-pandemic levels. The private transport mode share was 36.8 per cent of all trips on an annual average basis, slightly higher than in 2019 (36.4 per cent).

Both walk and cycle mode shares remained higher than before the pandemic, with 25.8 per cent of all trips in 2023 being walk trips. Cycle mode share remained at 4.5 per cent in 2023, compared to 3.6 per cent before the pandemic in 2019. Figure 5 shows mode shares for individual modes in 2023.

Figure 5 Mode share of daily trips in London, 2023.



Source: TfL Strategic Analysis, Customer & Strategy.

### Stage-based mode share estimates

Table 4 shows the stage-based mode shares over the last decade.

Table 4 Stage-based mode shares by type of transport, 2000 and 2013-2023.

Year	Public transport	Private transport	Cycle	Walk
(2000)	(32.6%)	(44.8%)	(1.1%)	(21.5%)
2013	43.3%	34.0%	1.9%	20.7%
2014	43.8%	33.6%	2.1%	20.5%
2015	43.5%	32.7%	3.4%	20.4%
2016	43.0%	32.8%	3.3%	20.8%
2017	42.7%	33.0%	3.5%	20.9%
2018	42.8%	32.7%	3.4%	21.1%
2019	42.7%	33.1%	3.3%	20.9%
2020	27.2%	37.1%	5.9%	29.7%
2021	29.1%	39.4%	3.8%	27.7%
2022	37.1%	34.7%	4.3%	24.0%
2023	39.7%	33.3%	4.3%	22.8%

Source: TfL Strategic Analysis, Customer & Strategy.

Note: The method used to estimate cycle journey stages changed in 2015.

In 2023, 39.7 per cent of journey stages in London were made by public transport, compared with 33.3 per cent by private transport. The public transport mode share increased compared to 2022 but remained below pre-pandemic levels. In contrast, the

private transport mode share decreased and in 2023 was almost the same as in 2019. Despite a decrease in walk mode share at the trip level compared to 2022, active travel mode shares at the journey stage level remained well above pre-pandemic levels, at 22.8 per cent for walk and 4.3 per cent for cycling.

### Active, efficient and sustainable mode share

Active, efficient and sustainable modes are defined in the Mayor’s Transport Strategy as walking, cycling and public transport. The active, efficient and sustainable mode share is calculated in terms of all trips, by all people (including residents and visitors) travelling in London on an annual average day.

There was a continuous year-on-year increase in the active, efficient and sustainable mode share between 2000 and 2019, but with the pace of change slowing between 2015 and 2019 (table 5). In 2023, the trip-based active, efficient and sustainable mode share increased by one percentage point with respect to 2022, to 63.2 per cent, 0.4 percentage points lower than in 2019 and the same level as in 2017.

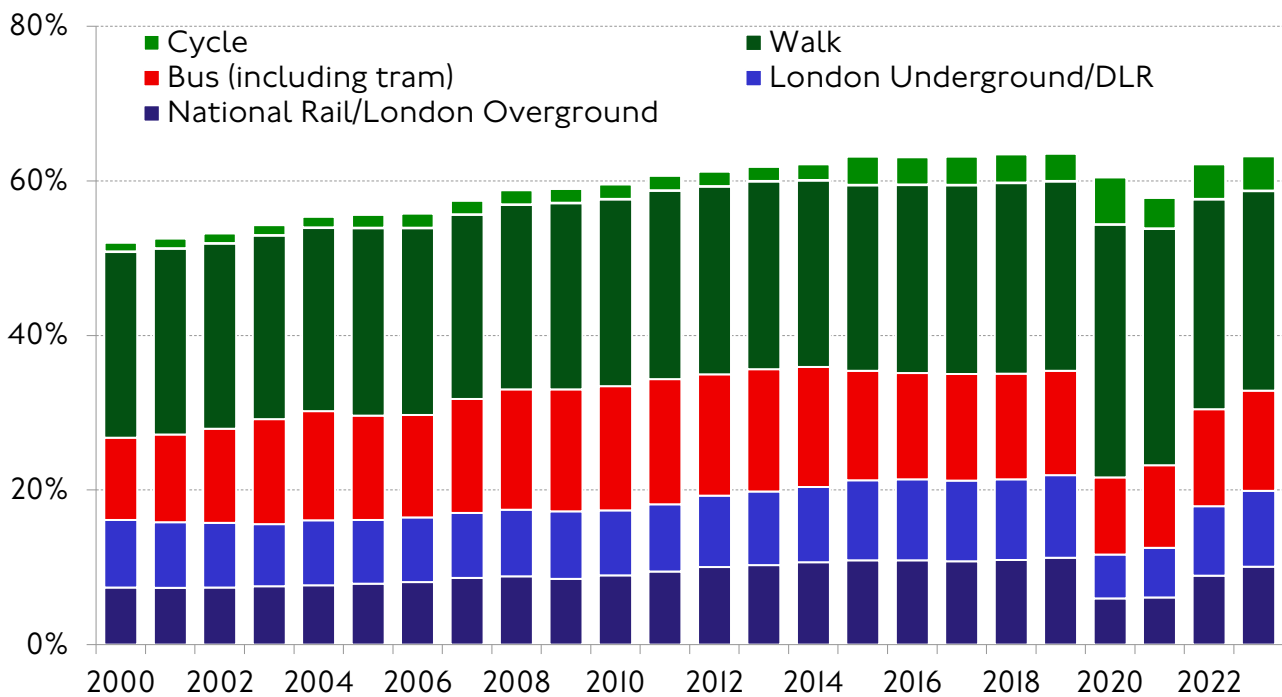
**Table 5** Proportion of trips and journey stages by active, efficient and sustainable modes, 2015-2023.

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023
<b>Trips</b>	63.2%	63.1%	63.2%	63.5%	63.6%	60.5%	57.8%	62.2%	63.2%
<b>Journey stages</b>	67.3%	67.2%	67.0%	67.3%	66.9%	62.9%	60.6%	65.3%	66.7%

Source: TfL Strategic Analysis, Customer & Strategy.

Figure 6 shows the historic series in this measure by mode.

**Figure 6** Active, efficient and sustainable trip-based mode share by mode, 2000-2023.



Source: TfL Strategic Analysis, Customer & Strategy.

Note: The method used to estimate cycle trips changed in 2015.

The post-pandemic trend reflects the ongoing shortfall, relative to before the pandemic, in public transport trips. London's slower than expected population growth is also a factor. However, active modes (walking and cycling) have increased in absolute terms since the pandemic.

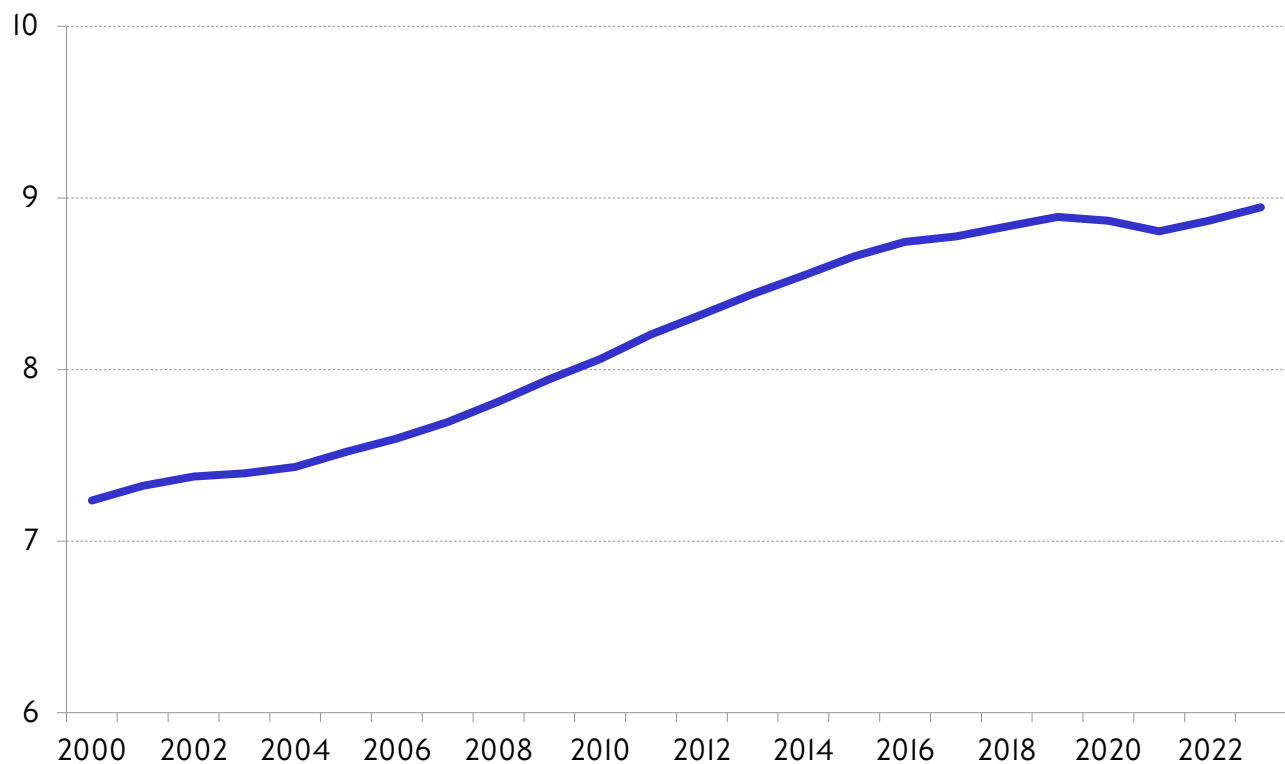
# Trends in the principal drivers of travel demand

## Population

The latest census of population was conducted across the UK in March 2021, during the latter stages of the coronavirus pandemic restrictions. At that point the population in London was estimated at 8.8 million (figure 7). Although this was an increase of 7.7 per cent compared with the previous census in 2011 (8.2 million), the rate of increase was slower than between 2001 and 2011 (14 per cent), and two per cent lower than contemporary mid-year estimates. This suggests that the rate of population growth may have been overestimated in the latter years of the last decade. This has implications for progress against the active, efficient and sustainable mode share aim, which was partly predicated on relatively higher population growth and higher densities favouring trips by active, efficient and sustainable modes.

Mid-year estimates for 2023 suggested that London's population grew by 0.9 per cent from 2022, to 8.9 million. Following two years of growth, in 2023 it was 0.6 per cent higher than in 2019. The growth was mostly due to natural change, with an increase in net international migration almost balanced out by an increase in London residents moving to other parts of the country.

Figure 7 London's population (in millions), 2000-2023.



Source: Office for National Statistics.

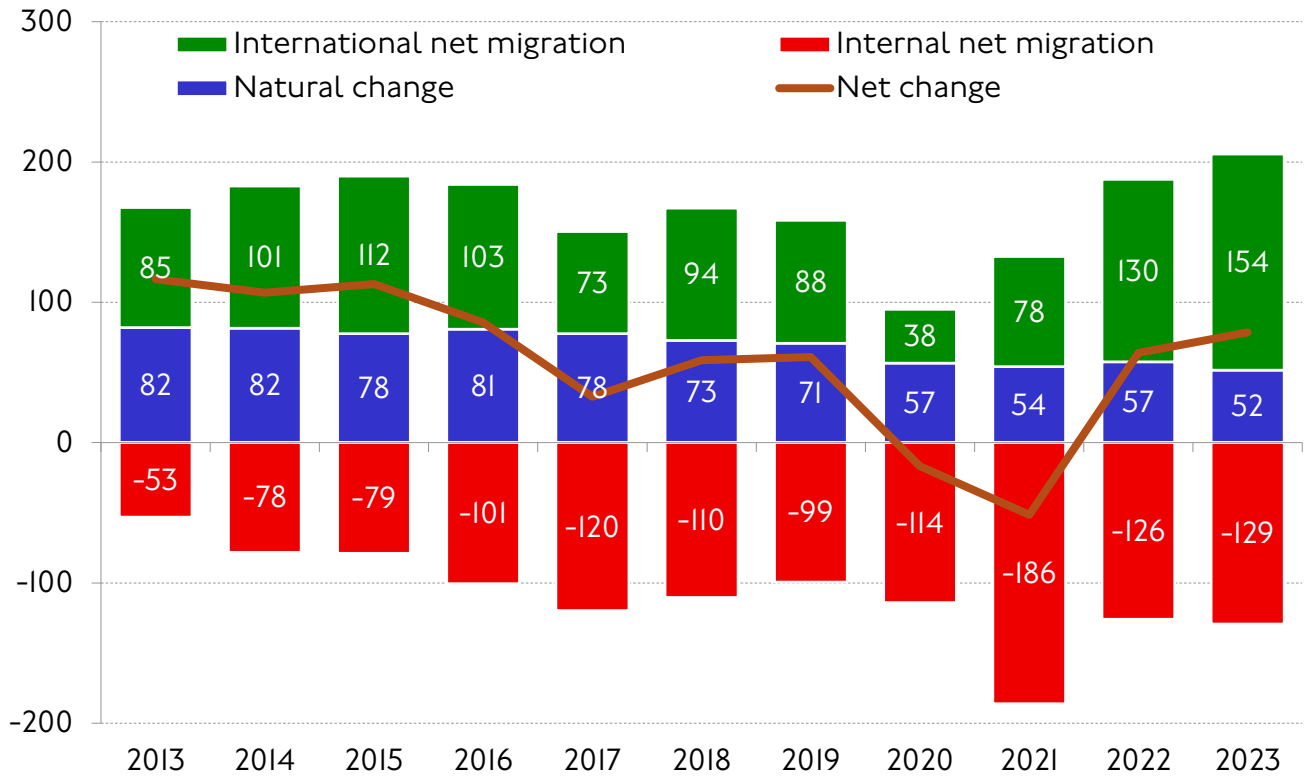
## Components of population change

London attracts a large amount of international migration, with 316,000 people moving to London in 2023, a 14 per cent increase compared with 2019. Considering international departures, international migration added 154,000 people to London's population in 2023.

Balancing this out, net migration to other parts of the country led to a decrease of almost 130,000 people. This means that London’s population growth in 2023 was mainly driven by natural change, with 52,000 more births than deaths.

The long-term trends in births in London is one of decline, with 20 per cent fewer births in 2023 compared with 2013. In the country as a whole, natural change is now net negative, with more deaths occurring than births. This, coupled with large net flows of London residents to other parts of the country, means there is little suggestion of strong population growth in London in the short to medium term.

Figure 8 London’s population change (in thousands) by component, 2013-2023.



Source: Office for National Statistics.

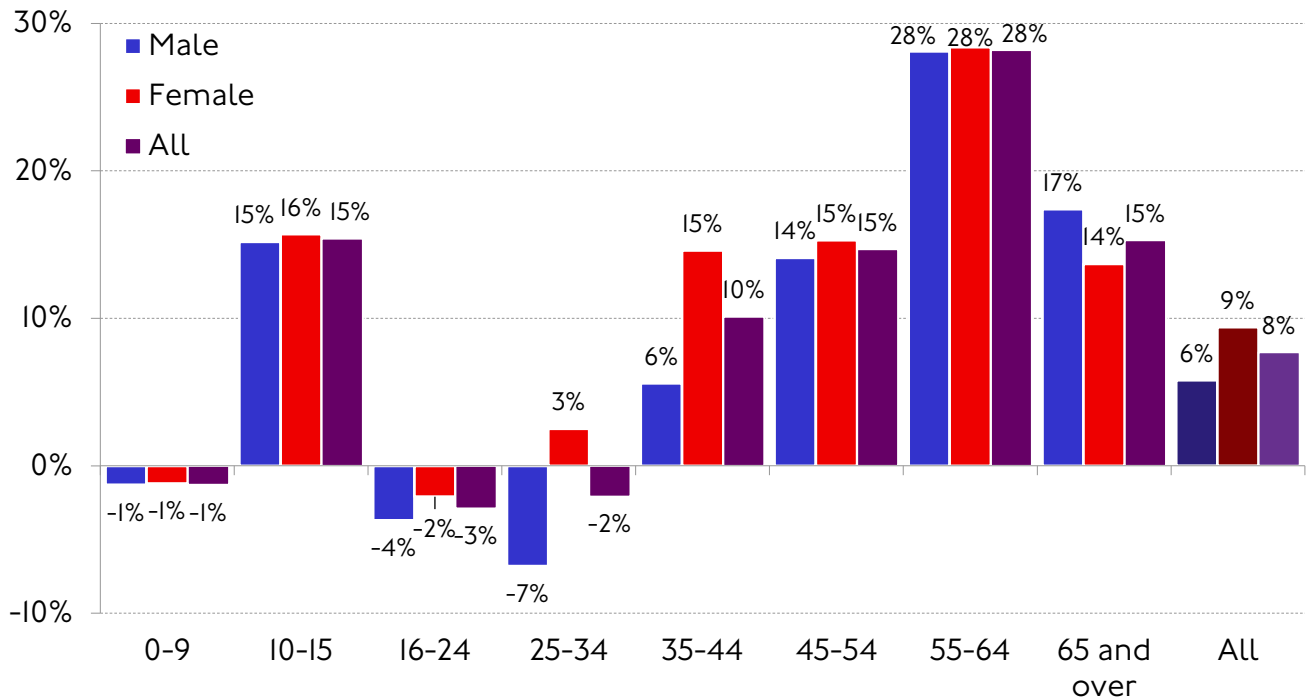
### Population by age group

The overall growth in London’s population between 2011 and 2021 masks some interesting changes by age and sex. London remains a young city, with just 11.9 per cent of the population aged 65 or over in 2021. The figure for England was 18.4 per cent. However, the highest growth rates between 2011 and 2021 were in people in the 55-64 category (figure 9). The under 10, 16 to 24 and 25 to 34 age groups all reduced over the decade, meaning that London is becoming an older city. The difference is even more pronounced for men, with a four per cent fall in the 16 to 24 age category and a seven per cent fall in the 25 to 34 age category. Between 2011 and 2021, the female population in London increased by 391,000, compared with an increase of 235,000 among the male population.

This may partly explain changes in travel behaviour in London over the last decade. Data from our London Travel Demand Survey shows that the number of trips made, and the modes used, differ by age and sex. For example, the highest trip rates tend to be among those aged 25 to 44, while the lowest are among those aged 16 to 24 and 65 and over. Men tend to make more rail- and car-based trips, while women tend to use the bus and walk more.



Figure 9 Change (between 2011 and 2021) in London's population, by age and gender.



Source: Office for National Statistics.

## Economy

### Economic trends and forecasts

The GLA's [London's economic outlook](#) report forecasts that London's real Gross Value Added (GVA) growth rate will be 1.1 per cent in 2024, as high interest rates and the prolonged cost-of-living crisis act as drags on the economy. While this growth rate is higher than in 2023 (0.7 per cent) and is expected to pick up slightly in 2025 (1.9 per cent) and 2026 (2.2 per cent), it remains below historic averages.

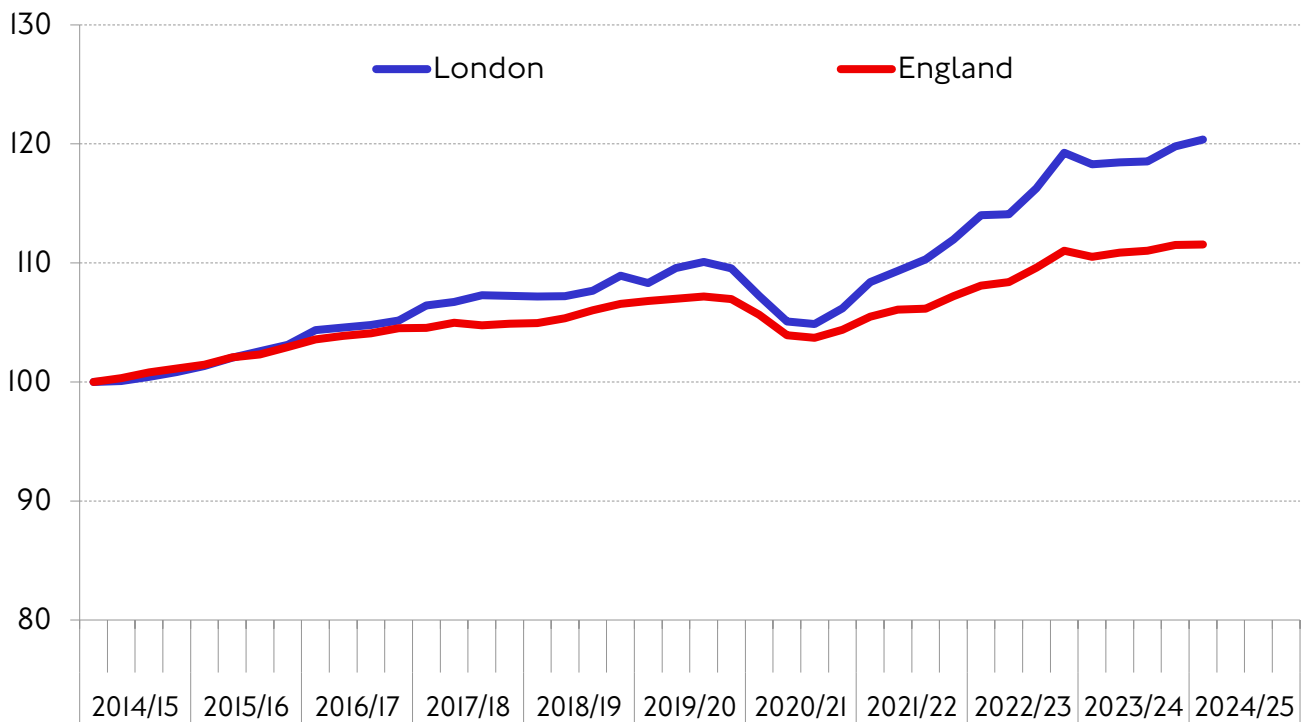
Projections from the Bank of England in August's [Monetary Policy Report](#) showed that economic growth nationally was likely to be low this year, with a projected increase in Gross Domestic Product (GDP) of 1.5 per cent in the year to quarter 3 2024 (July to September), and a 0.8 per cent increase between quarter 4 2024 (October to December) and quarter 4 2025 (October to December). This compares to year-on-year increases of around two per cent before the pandemic. While inflation fell from a peak of 11.1 per cent in October 2022, wage growth continued to lag inflation until mid-2023, although in the year to August 2024 regular pay increased 1.9 per cent in real terms. Restrictive monetary policy to help bring down inflation is resulting in slow economic growth as households reduce spending while disposable incomes are squeezed.

The economic outlook remains highly uncertain and inflation rates have yet to stabilise, therefore monetary policy to manage this is likely to persist. There remains some optimism, however, with consumer confidence in London sitting at six in September 2024, where any score above zero reflects a net positive sentiment. This compares to the national level where a positive index score has not been seen since January 2016. This shows that there is a greater level of optimism in London with regards to the economic outlook compared to the rest of the UK.

## Workforce jobs

Provisional estimates from the Office for National Statistics show that workforce jobs in London increased by two per cent between quarter I 2023/24 (April to June) and the equivalent quarter in 2024/25 and 11 per cent since the same quarter in 2019/20 (figure 10). This compares to national figures which show an increase of one per cent and four per cent, respectively. However, the GLA forecasts that the rate of growth is likely to slow to 1.0 per cent in 2024 and 1.3 per cent in 2025.

Figure 10 Change (index: quarter I 2014/15 (Apr-Jun) = 100) in workforce jobs in London and England, by (financial) quarter, quarter I 2014/15 (Apr-Jun)-quarter I 2024/25 (Apr-Jun).



Source: Office for National Statistics

The strong growth in workforce jobs in London over the last year has largely been driven by the recovery of jobs in the arts, entertainment and recreation sector (a year-on-year increase of 26 per cent), and some growth in service sectors including transport and real estate, as well as health and social care. Over recent decades London's service sector has continued to grow, while the share of jobs in construction and production have fallen. The recovery of jobs following the pandemic has continued to lead to an increasing proportion of jobs in London in service industries.

A further shift in employment trends in London in recent years has been the composition of people employed in jobs in London by nationality, which changed substantially since the UK's formal exit from the European Union. Analysis of [payrolled employments by nationality](#) undertaken by the GLA showed that 41 per cent of payrolled jobs in London were held by non-UK workers, compared to 18 per cent nationally.

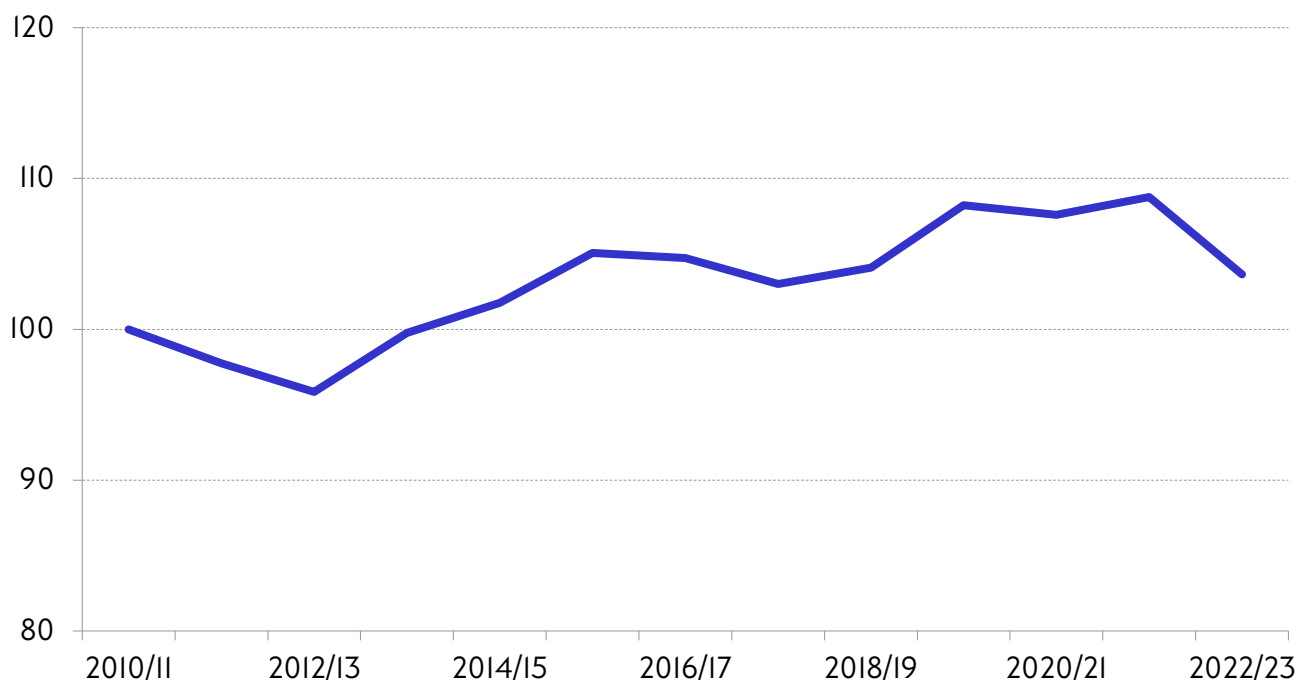
In January 2020, a similar number of payrolled jobs in London were held by EU and non-EU citizens (around 850,000 jobs, equivalent to 19 per cent), but by December 2023 EU nationals accounted for 16 per cent of jobs, compared to 25 per cent by non-EU nationals. The sectors seeing the largest decline in EU workers since December 2023 are hospitality, administration and retail. While both hospitality and retail jobs have seen a

corresponding increase in predominantly non-EU nationals and some UK national workers undertaking these jobs, and thus seeing an overall increase in payrolled jobs over this period, retail has seen a decline.

### Travel demand impacts

The most recent national data on [disposable household incomes](#) shows that in 2022/23 mean disposable household income (in 2022/23 prices) fell by four per cent compared to before the pandemic (2019/20). This compares to the four years until 2019/20 where disposable income increased by three per cent (figure II).

Figure II Change (index: 2010/11 = 100) in UK mean disposable income, 2010/11-2022/23.



Source: Office for National Statistics

The reduction in disposable household income was greatest for people aged 35-44 (a reduction of 10 per cent) and those in the top 10 per cent of households based on disposable income (a reduction of four per cent). For households with the highest disposable incomes this reduction equated to a fall of around £2,500. Although these households have a high disposable income compared to other groups, this reduction is not insignificant and is likely to impact on spending and therefore travel patterns. Higher-income households tend to travel more frequently and so even a slight reduction in travel could influence overall trip rates, as these groups may choose to make fewer shopping and leisure trips to adapt to the reduction in disposable income.

While the fall in disposable incomes was greatest for higher-income households, the squeeze is felt most acutely for lower-income households. The GLA's monthly [cost-of-living survey](#) showed that in August 2024 almost a fifth (18 per cent) of London residents were struggling to make ends meet or having to go without basic needs or rely on debt, defined as financially struggling. This was a slight decrease compared to a year ago (21 per cent), although it remains high historically.

The groups with the highest proportion of people reporting to be financially struggling were aged 50-64 years old (25 per cent), London residents in the 'other or mixed ethnicities' category (24 per cent), and those not in employment (22 per cent). A third of

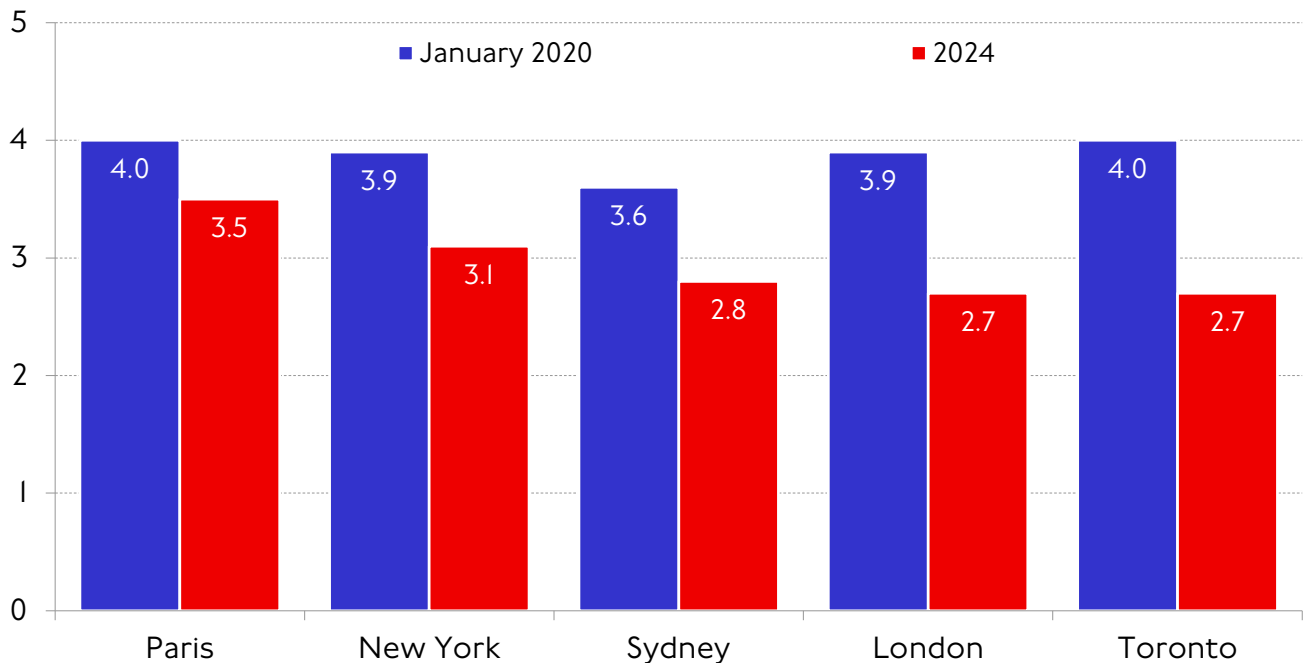
London residents living in low-income households (less than £20,000) and 29 per cent of people renting reported to be financially struggling in August 2024.

To help manage living costs, 47 per cent of London residents reported to be spending less on non-essentials, and 29 per cent reported using 'free transport (walking or cycling)'. Reducing spend on non-essentials was highest for London residents renting from a private landlord (59 per cent), those aged 35-49 (54 per cent) and 25-34 (51 per cent). Some 41 per cent of London residents aged 18-24 report reported using 'free transport' to manage living costs. Some 35 per cent of London residents living in low-income households and 37 per cent of inner London residents also reported managing living costs by choosing to walk or cycle.

The way in which London residents are coping with the cost-of-living crisis is likely impacting travel patterns. Both spending less on non-essentials and considering which transport options to use in order to save money will influence the purposes and modes people use to travel in London. For example, the London Travel Demand Survey showed that in 2023/24 London residents made 11 per cent fewer trips for leisure purposes and eight per cent fewer trips for shopping and personal business than in the previous year.

In addition to the cost-of-living crisis impacting travel demand, particularly for shopping and leisure purposes, commuting trips also remained subdued following a slow return to the office as a result of historically high levels of working from home. The Centre for Cities report [Return to the office: how London compares to other global cities, and why this matters](#) published in September 2024 shows that while office attendance in London increased steadily since the pandemic, it lagged other global cities (figure 12).

Figure 12 Average number of days per week worked in the office for full-time workers in selected cities, January 2020 versus 2024.



Source: Centre for Cities.

The average number of days worked in the office in London increased from 2.2 days in early 2024 to 2.7 days by mid-2024. This compares to 3.5 days in Paris and 3.1 days in New York. There is some debate as to whether the higher proportion of home working could influence productivity through the long-term impacts on skills development and career progression of younger workers.