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# Travel in London 2024

## The travel behaviour of London residents based on the London Travel Demand Survey

MAYOR OF LONDON



**TRANSPORT  
FOR LONDON**  
EVERY JOURNEY MATTERS

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2023/24 update

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## Summary of key findings

This report looks at aspects of the travel behaviour of London residents as tracked through our London Travel Demand Survey (LTDS), which has been running continuously since 2005/06. Each year, we survey around 8,000 households across London, capturing a wide range of sociodemographic data as well as a complete record of travel on the designated travel day for each household member aged five years and over. It should be noted that the LTDS considers London residents only and does not therefore give a full picture of all travel in London.

The 2023/24 LTDS provides the second year of post-pandemic travel patterns and is directly comparable with the most recent pre-pandemic survey (2019/20) and the longer-term historical series. This year of data is of particular interest given the previous year was still affected by residual pandemic effects as the final restrictions and procedures such as mass testing had only just been lifted at the start of 2022/23. The 2023/24 data gives us a good view of what might now be regarded as more established post-pandemic trends.

The coronavirus pandemic placed restrictions on the normal conduct of the LTDS during survey years 2020/21 and 2021/22, and a scaled-down version of the survey was conducted by telephone. Key findings from this version of the survey were discussed in [Travel in London reports 14 and 15](#). However, data for these intermediate years is generally omitted from the comparison in this report to aid clarity and interpretation (note the series break in the figures).

The travel behaviour trends in 2023/24 present a mixed picture in terms of the progress towards Mayor's Transport Strategy goals and there is evidence that some emerging trends in travel behaviour, which were intensified by the pandemic, have continued to persist.

### Trips per person per day

- During the pandemic, trip rates reached unprecedented lows. Although trip rates have since recovered, average trip rates in 2022/23 were 6.2 per cent lower than in 2019/20 and there was a further decrease of 4.6 per cent in 2023/24, mostly reflecting a decrease in walk (all the way) trips. The average trip rate in 2023/24 was 1.98 trips per person per day, 10.5 per cent below the pre-pandemic position. The evidence therefore suggests that the long-term trend of falling demand for travel per person, reflected through trip rates and observed elsewhere, continued in 2023/24.
- At the national scale, data from the National Travel Survey shows that trip rates in England have also been decreasing over the long term, and in 2023 remained below pre-pandemic levels (a four per cent decrease in 2023 against 2019).

### Travel by mode

- The key changes in travel by mode (for residents) in 2023/24 compared to 2022/23 were an increase of three percentage points in the public transport mode share, a small decrease in the share of trips made by private modes and a decrease in the

share of trips made by active modes, particularly walking. However, both walking and cycling mode shares remained above 2019/20 levels and the active travel mode share was three percentage points higher than pre-pandemic values, suggesting that some of the strong increases seen during the pandemic have been sustained. This is all in the context of lower overall trip rates.

- The net outcome in London residents' active, efficient and sustainable mode share for 2023/24 was an increase from 66.7 per cent in 2022/23 to 67.2 per cent. Although there was a decrease in the active travel mode share (following strong increases in 2022/23), this was offset by an increase in the public transport mode share, particularly bus. Note that this is for London residents only and is not the same as the Mayor's aim for 80 per cent of all trips in London to be made by active, efficient and sustainable modes by 2041.
- Inner London residents made seven per cent more trips per day than outer London residents in 2023/24. Before the pandemic, the difference was only three per cent, and until 2009/10 outer London residents' trip rates were higher than inner London residents' trip rates.

## Travel by journey purpose

- In relative terms, the share of commuting, work-related travel and shopping/personal business trips was lower in 2023/24 compared to before the pandemic, in London and at the national scale. This may reflect changes to working patterns and hybrid working leading to a reduction in commuting and work-related trips, as well as renewed and persisting cost-of-living pressures continuing to impact the frequency of travel for discretionary purposes.
- People are travelling less often on average for commuting and other work-related travel in London and England, and the magnitude of change in trip rates was similar (between 16 and 20 per cent for commuting and between 21 and 27 per cent for other work-related trips in 2023/24 against 2019/20 levels).
- Despite an increase in leisure trip rates in London in 2022/23 compared to before the pandemic, leisure trip rates decreased by 11 per cent in 2023/24 and further analysis shows that this decrease was more pronounced among London residents aged under 25, students and those who were not working. This could be driven by cost-of-living pressures affecting individuals and households who are less financially resilient.

## Remote working

- The number of London resident workers who were able to work from home (and were encouraged to do so) doubled between 2019/20 and 2023/24, from 0.78 million to 1.57 million (equivalent to around 35 per cent of London resident workers). The most common working from home frequency was three or four days per week, however the majority of London resident workers (53 per cent) did not work from home at all.

## Travel distance

- The average distance travelled in 2023/24 was 13 per cent lower than before the pandemic. The length of time residents spent travelling decreased from 72 minutes per person per day in 2005/06 to 61 minutes in 2019/20. In 2022/23, this decreased to 56 minutes, the first time that the average time spent travelling per day fell below one hour. In 2023/24, there was a further decrease to 54 minutes per day.

## Car ownership

- Overall in London there has been a decrease in car ownership over the long term, with the proportion of households not owning a car increasing from 41 per cent in 2005/06 to 45 per cent in 2023/24. The proportion of households without access to a car was 62 per cent in inner London and 33 per cent in outer London in 2023/24.

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# Trip rates

## Overall trip rate by London residents

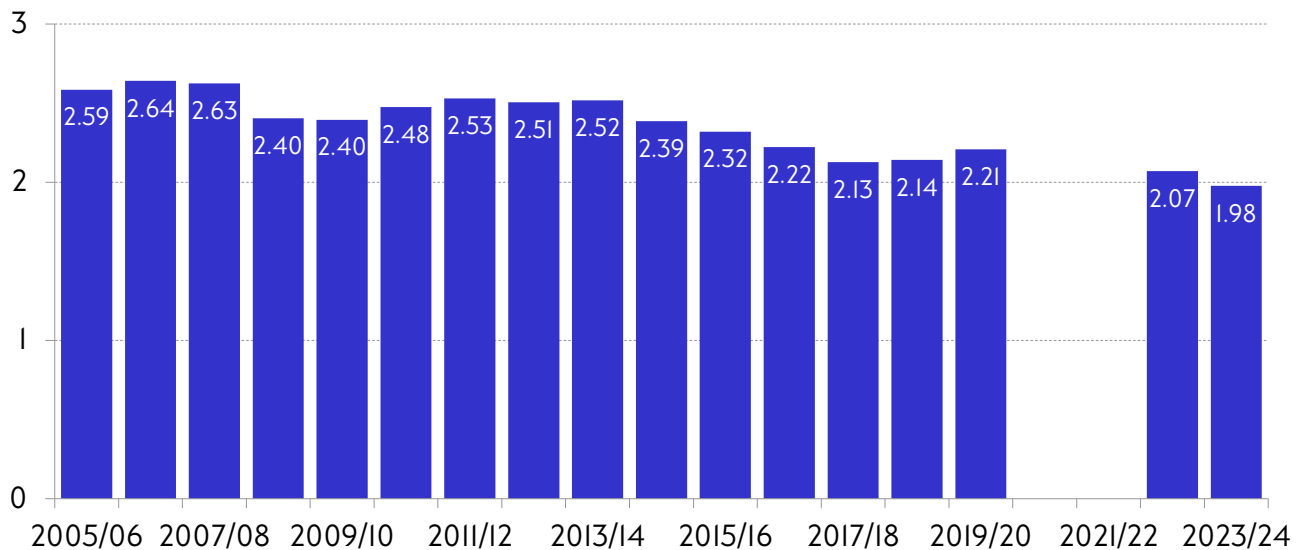
Trip rates (the average number of trips made per person per day) are a basic indicator of travel demand. The LTDS has tracked a pattern of generally falling trip rates over its lifetime. This trend accelerated between 2013/14 and 2017/18. However, in the two years before the pandemic the trip rate increased slightly, to 2.21 trips per day in 2019/20, thought to be due to improving economic conditions.

Data shows that, in 2022/23, trip rates had not fully recovered to pre-pandemic levels, averaging 2.07 trips per person per day. In 2023/24, trip rates decreased by 4.6 per cent to 1.98 trips per person per day relative to 2022/23. Trip rates in 2023/24 were 10.5 per cent lower than in 2019/20 and 25 per cent lower than at the high point of 2.64 in 2006/07 (figure 1). However, public transport trip rates increased by 5.8 per cent in 2023/24 compared to 2022/23 and much of the decrease in the overall trip rate was due to a reduction in walk (all the way) trips, down to 0.73 per person per day, a 10 per cent decrease on 2022/23 but still higher than all other years in the past decade except 2019/20. When walk all the way trips are excluded, the change in the trip rate in the latest year was a reduction of 1.2 per cent.

At the national scale, the latest estimates from the National Travel Survey (for calendar year 2023) show that trip rates for people living in England increased by six per cent compared to 2022, although they remained four per cent lower than they were in 2019. Therefore, at both the London and national scale, trip making in 2023(/24) had not returned to pre-pandemic levels. However, in the latest year, London resident trip rates decreased slightly while trip rates for people living in England increased slightly.

Although continuing a long-established trend of slowly decreasing trip rates, these recent further reductions in average trip rates for London residents are of significant interest, especially in the post-pandemic context. The following sections explore how this is expressed for different sociodemographic groups and trip types.

Figure 1 Trips per person per day by London residents, LTDS, 2005/06-2023/24.



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.

## Trip rates by sociodemographic groups

Table I shows trip rates by different sociodemographic groups in 2019/20, 2022/23 and 2023/24.

Looking first at **gender**, the data shows that male and female trip rates have changed at a similar rate over the period. Between 2019/20 and 2022/23, the trip rate for men and women decreased by six per cent from 2.21 trips per person to 2.07 trips per person respectively. In the latest year, there was a slightly greater decrease in trip rates among women than men (five per cent compared to four per cent), resulting in a difference of 0.8 per cent in their respective trip rates in 2023/24.

Trip rates for all **age groups** were lower in 2023/24 compared to 2019/20 and in the latest year they decreased for all age groups except those aged 65 or more. Between 2022/23 and 2023/24, the smaller decreases in trip rates were seen among those aged 17-24 and 25-44, however 17-24-year-olds continued to have the lowest trip rate at 1.6 trips per person per day, while the highest was among 25-44-year-olds (2.18 trips per person per day). There were larger decreases of between seven and nine per cent among those aged 5-16, 45-59 and 60-64 and a three per cent increase in trip rates among those aged 65 or more (although it remained below the pre-pandemic average).

By **ethnicity**, trip rates decreased for all groups except people in other ethnic groups in the latest year, with larger decreases among White residents (a six per cent reduction) and Black residents (an eight per cent reduction) while Asian residents saw a slightly smaller decrease (a three per cent reduction). Despite the six per cent increase in trip rates for people in other ethnic groups in 2023/24, trip rates for all groups were lower than in 2019/20, showing reductions of between eight and 14 per cent. White residents continued to make the highest number of trips per day and Black residents made the fewest trips per day.

Trip rates have decreased across all **working status** categories since the pandemic. The largest decreases in trip rates since 2019/20 were among students and non-working residents. In the latest year, trip rates decreased among all groups except retired residents, and part-time workers continued to have the highest trip rate (2.42 trips per person per day) while the lowest trip rate was among students (1.63 trips per person per day). The trip rate of full-time workers decreased by four per cent in the latest year and was 10 per cent lower than in 2019/20. Note that this refers to all trips and not just work-related trips.

In terms of **household income**, people in higher-income households make more trips on an average day than people in lower-income households. Before the pandemic, people living in households with incomes below £20,000 per year made 2.04 trips per person per day, while people living in households with an income higher than £100,000 made 2.49 trips per person per day. Trip rates fell across all household income groups in 2023/24, with a decrease of two per cent for households with an income of less than £20,000 and seven per cent for households in all income brackets (respectively) above £20,000.

Overall, the data in this table shows that the decrease in trip rates is widespread among London's population and affected all sociodemographic groups, although there are differences in the magnitude of the decrease among different groups. Despite a significant recovery of trip rates from unprecedented lows in 2020/21 and 2021/22, the long-term trend of falling demand for travel looks to be continuing and is likely to have been exacerbated by the pandemic and the cost-of-living crisis.



Table I Trip rate by sociodemographic group, LTDS, 2019/20, 2022/23 and 2023/24.

Sociodemographic attribute	Group	2019/20	2022/23	2023/24	Change from 2022/23 to 2023/24	Change from 2019/20 to 2023/24
Gender	Male	2.21	2.07	1.98	-4%	-10%
	Female	2.21	2.07	1.97	-5%	-11%
Age	5-16	1.89	1.91	1.78	-7%	-6%
	17-24	1.81	1.66	1.60	-3%	-11%
	25-44	2.45	2.25	2.18	-3%	-11%
	45-59	2.38	2.29	2.09	-9%	-12%
	60-64	2.41	2.11	1.97	-7%	-18%
	65+	1.92	1.75	1.80	3%	-6%
Ethnicity	White	2.38	2.29	2.14	-6%	-10%
	Asian	2.04	1.85	1.79	-3%	-12%
	Black	1.97	1.83	1.68	-8%	-14%
	Other groups	2.22	1.92	2.04	6%	-8%
Working status	Full-time work	2.40	2.24	2.15	-4%	-10%
	Part-time work	2.72	2.59	2.42	-7%	-11%
	Student	1.87	1.72	1.63	-5%	-13%
	Not working	2.06	1.83	1.66	-9%	-19%
	Retired	1.89	1.65	1.74	5%	-8%
Household income	Under £20k	2.04	1.90	1.87	-2%	-9%
	£20k-£50k	2.22	2.00	1.85	-7%	-17%
	£50k-£100k	2.29	2.17	2.02	-7%	-12%
	Over £100k	2.49	2.38	2.22	-7%	-11%

Source: TfL Strategic Analysis, Customer & Strategy.

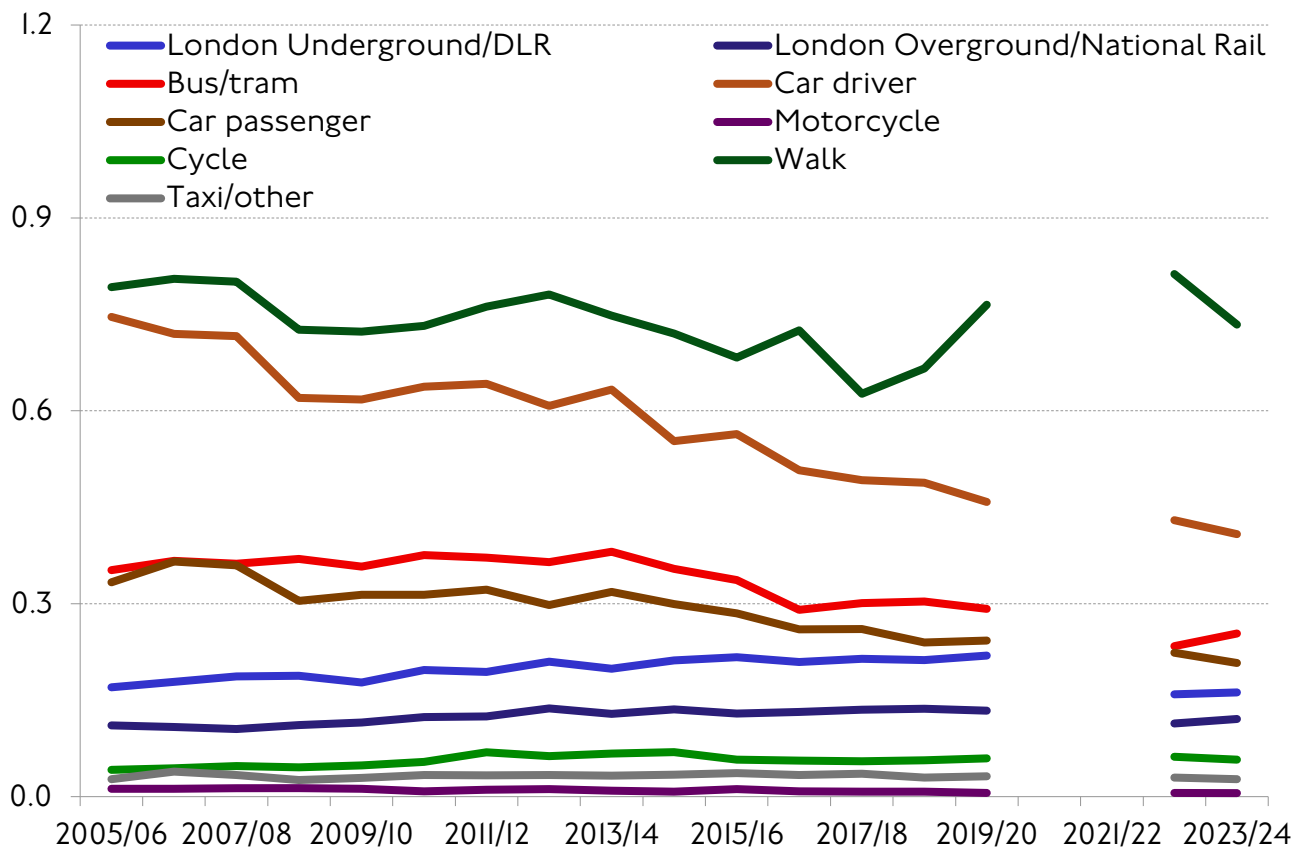
## Trip rates by mode of travel

Figure 2 shows the long-term trend in trip rates by mode of travel over the history of the LTDS. Rail mode trip rates increased gradually between 2005/06 and 2019/20, and despite dropping after the pandemic showed a slight increase in the latest year (six per cent for London Overground/National Rail and two per cent for London Underground/ DLR). Bus trip rates have been slowly declining since 2013/14, and also dropped after the pandemic, but increased in the latest year by eight per cent to 0.25 trips per person per day.

The steady decrease in car driver trip rates over the long term is notable, down from 0.75 trips per person per day in 2005/06 to 0.46 in 2019/20. In 2023/24, the value was 0.41 trips per person per day, continuing the long-term decrease. Car passenger trip rates were also down overall, decreasing from 0.37 trips in 2006/07 to 0.21 in 2023/24 (down by seven per cent on 2022/23).

In the period leading up to the pandemic, cycle trip rates increased relatively slowly, reflecting cycling participation levels among the general population, and have remained at similar levels of around 0.06 trips per person per day after the pandemic. Walk trips have been much more changeable over the survey period, showing an increase prior to and during the pandemic. In the latest year, there was a decrease in the walking trip rate from 0.81 to 0.73 trips per person per day, however this remained at a similar level to 2019/20, and may be interpreted as a reflection of post-pandemic conditions.

Figure 2 Trips per person per day, by mode, LTDS, 2005/06-2023/24.



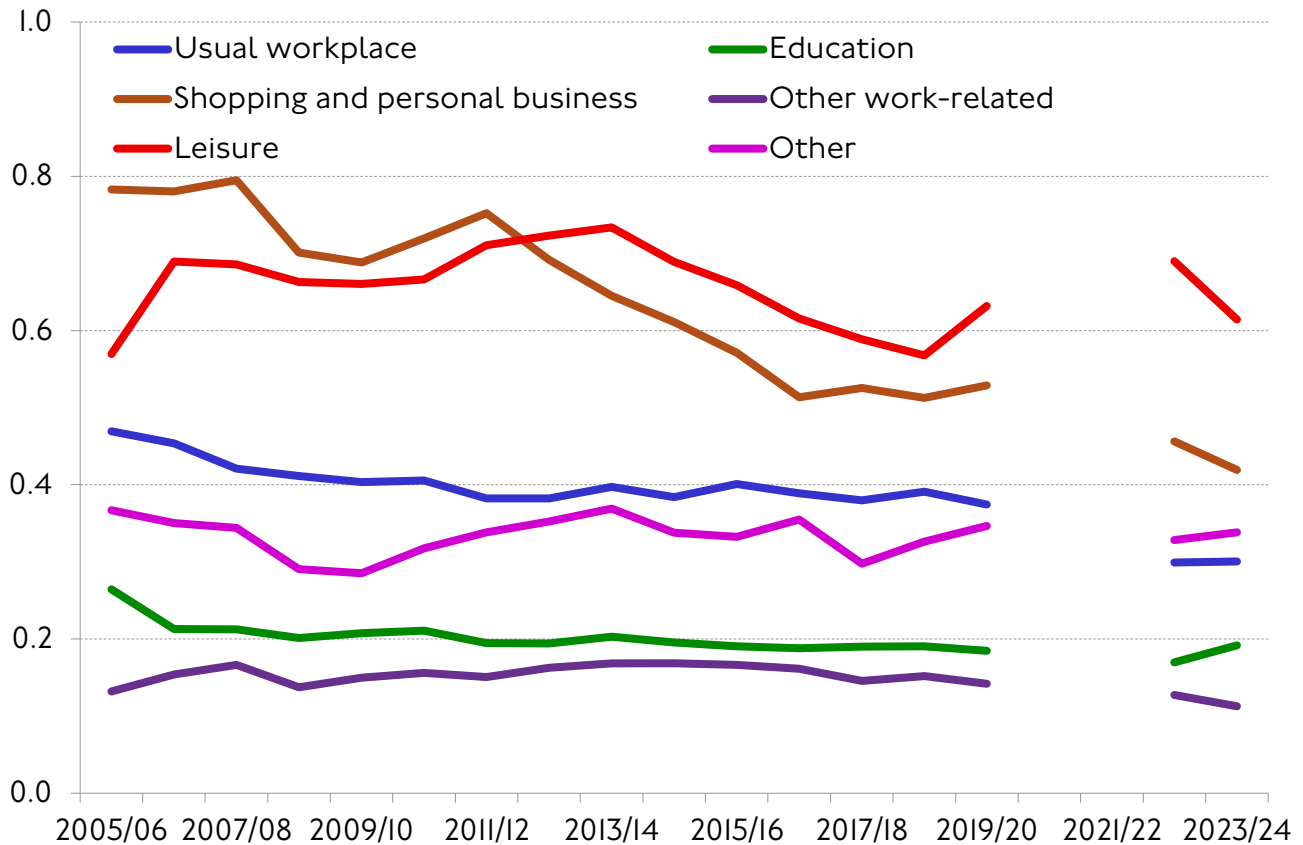
Source: TfL Strategic Analysis, Customer & Strategy.

Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

## Trip rates by journey purpose

Prior to the pandemic, the long-term trends in trip rates by purpose showed a decrease in both shopping/personal business and leisure trips, both of which had been falling since the early part of the previous decade (figure 3). Trip rates for most other purposes had remained relatively stable, meaning that the overall decrease in trip rates was being driven at first by the decrease in shopping/personal business trips which started in 2012/13, and from 2014/15 was accompanied by a decrease in leisure trips, the latter thought primarily to reflect cost-of-living pressures.

Figure 3 Trips per person per day, by journey purpose, LTDS, 2005/06-2023/24.



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.

The main changes in 2022/23 relative to 2019/20 were a decrease in commuting (usual workplace) trip rates (down by 20.1 per cent) and shopping/personal business trip rates (down by 13.7 per cent). These decreases were partially offset by an increase in leisure trip rates (of 9.2 per cent). Overall, these changes reflected a shift in post-pandemic travel patterns of fewer work trips being partly compensated for by increased leisure trips, although again in the context of renewed cost-of-living pressures.

Overall, in the latest year, trip rates fell by 4.6 per cent, however not all journey purpose categories decreased. Commuting (usual workplace), education and other trip rates increased since 2022/23 (by one per cent, 13 per cent and three per cent respectively). However, other work trips (work-related travel that is not to or from the usual workplace), shopping/personal business and leisure trip rates all decreased in the latest year, by 12 per cent, eight per cent and 11 per cent respectively. These were relatively large single-year decreases. Shopping/personal business trips in 2023/24 were 44 per cent

below the high in 2011/12 and leisure trip rates were 16 per cent below the high in 2013/14. Therefore, the decrease in trip rates has been driven by a fall in the rate of work-related travel (other than commuting) and discretionary trips.

It is thought that these changes in trip rates reflect a range of social, structural and economic factors, already present before the pandemic, but possibly exacerbated by it. It should be recognised that, as London’s population grows, falling average trip rates are partly compensated for by more people travelling. So, between 2013/14 and 2017/18, London resident average trip rates fell by 15 per cent but total travel demand fell by only 12 per cent, mitigated by the increase in London’s population over the period. Note also that total travel demand in London is influenced by non-London resident travel, the levels and patterns of which have also been significantly affected by the pandemic.

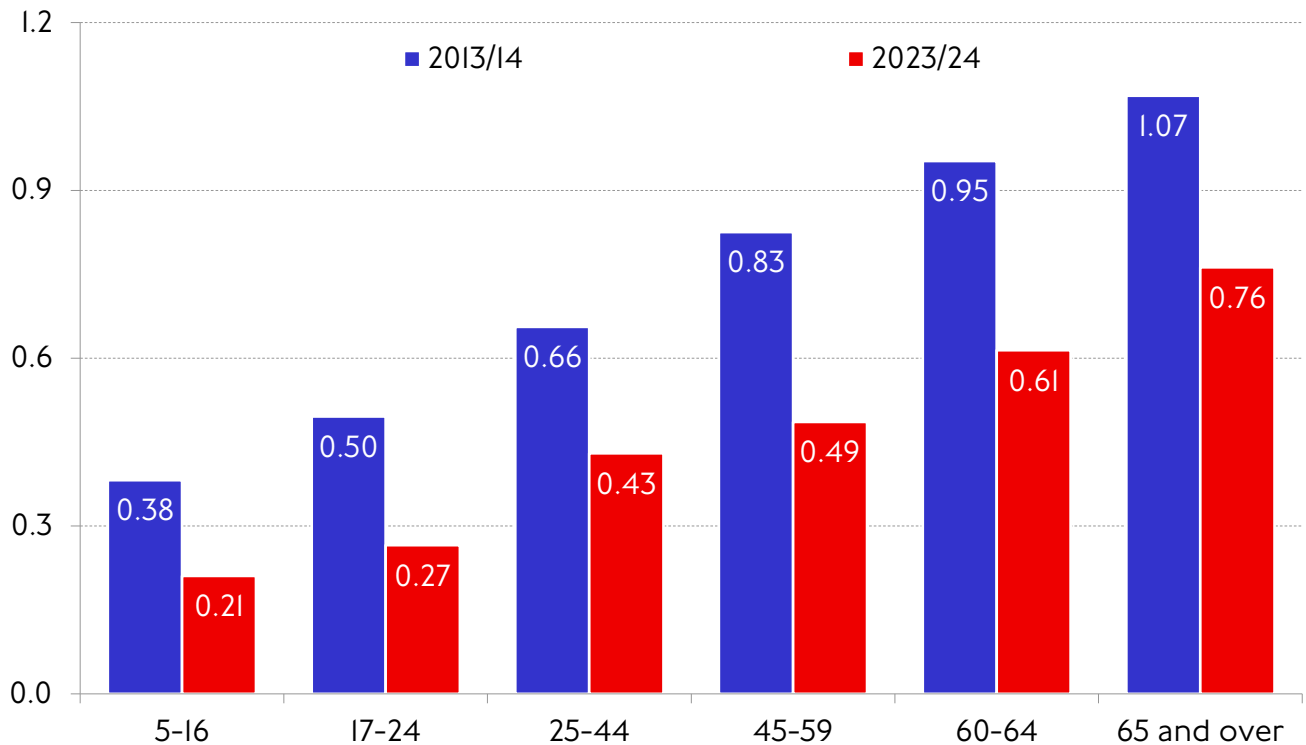
### Exploring the decline in shopping/personal business and leisure trip rates

It is of interest to explore the decline in shopping/personal business and leisure trips further to determine whether the reduction in these discretionary trips has occurred across the whole population or is more pronounced among certain groups. This section provides a comparison of shopping/personal business and leisure trip rates in 2023/24 against 2013/14. In 2013/14, shopping/personal business trip rates had already started to decline, but leisure trip rates were at their highest rate since the LTDS began.

#### Shopping/personal business trip rates

Looking first at shopping/personal business trip rates, figure 4 shows trip rates by age group in 2013/14 and 2023/14.

Figure 4 Shopping and personal business trips per person per day, by age, LTDS, 2013/14 versus 2023/24.

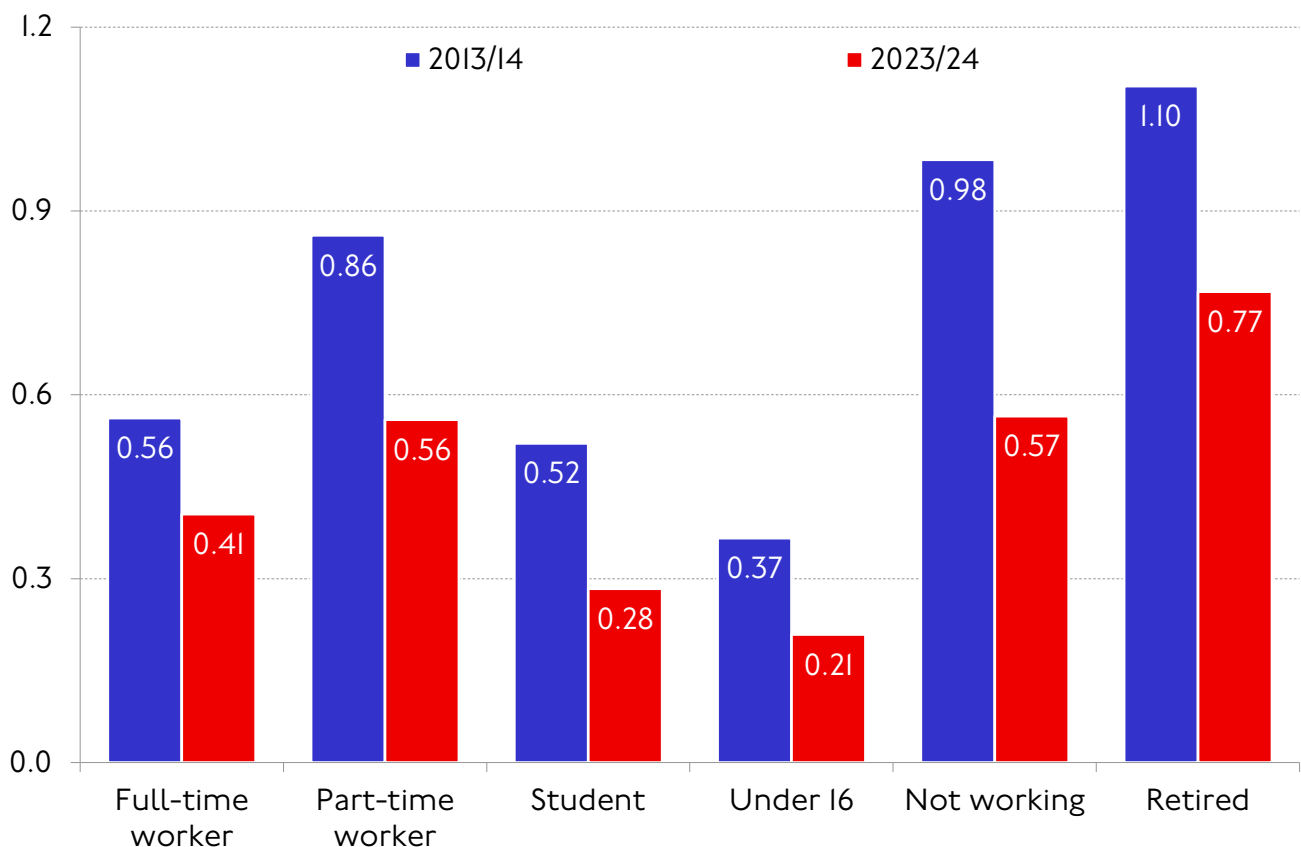


Source: TfL Strategic Analysis, Customer & Strategy.

The data shows that in general the trip rate increases with age, with older London residents making more shopping/personal business trips per person per day than younger residents. However, shopping/personal business trip rates declined across all age groups between 2013/14 and 2023/24 and the magnitude of decline was not dissimilar across groups (a slightly greater proportional decline among under 25s, but from a low rate, and a slightly smaller proportional decline among those aged 65+). Therefore, declines in trip rates for these purposes affected all age groups broadly consistently over this ten-year period.

Figure 5 shows shopping/personal business trip rates by working status.

**Figure 5** Shopping and personal business trips per person per day, by working status, LTDS, 2013/14 versus 2023/24.

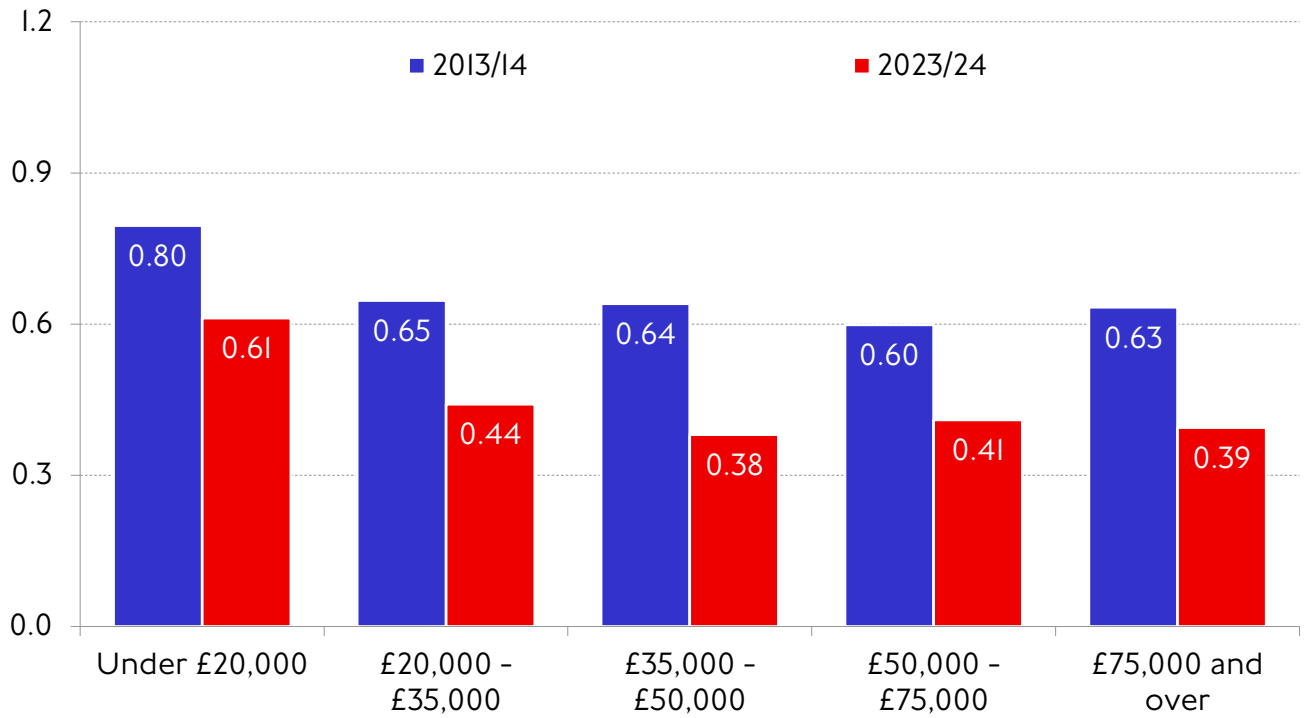


Source: TfL Strategic Analysis, Customer & Strategy.

Overall, trip rates are higher among part-time workers, those who are not working and retired residents, and lower among full-time workers, students and residents aged under 16. However, all groups experienced a decline since 2013/14, ranging between 28 per cent for full-time workers and 46 per cent for students. This shows that, although the average number of shopping/personal business trips made per person differs between the working status groups, the decline occurred for all groups over the same period.

Finally, figure 6 shows shopping/personal business trip rates by household income, which shows a similar trend as for age and working status, where trip rates declined by a similar magnitude across all household income groups between 2013/14 and 2023/24.

Figure 6 Shopping and personal business trips per person per day, by household income, LTDS, 2013/14 versus 2023/24.

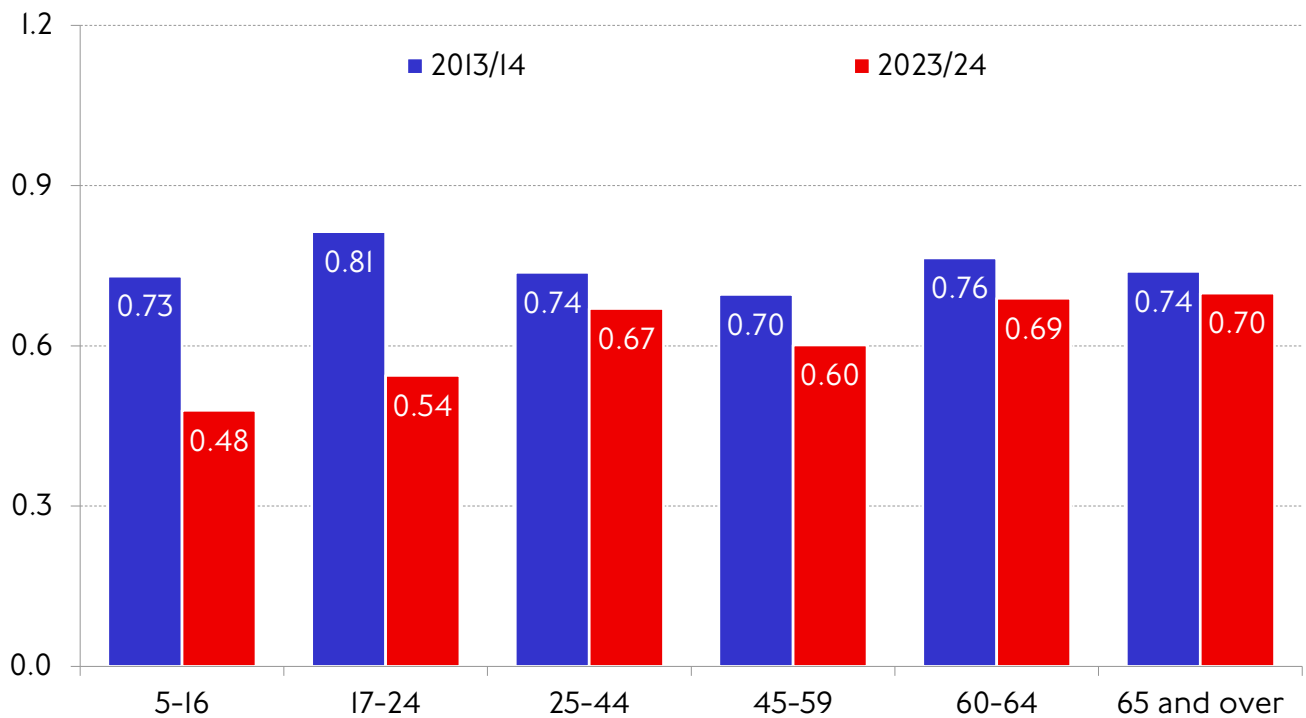


Source: TfL Strategic Analysis, Customer & Strategy.

### Leisure trip rates

Focusing now on leisure trip rates, figure 7 shows the change between 2013/14 and 2023/24 by age group.

Figure 7 Leisure trips per person per day, by age, LTDS, 2013/14 versus 2023/24.

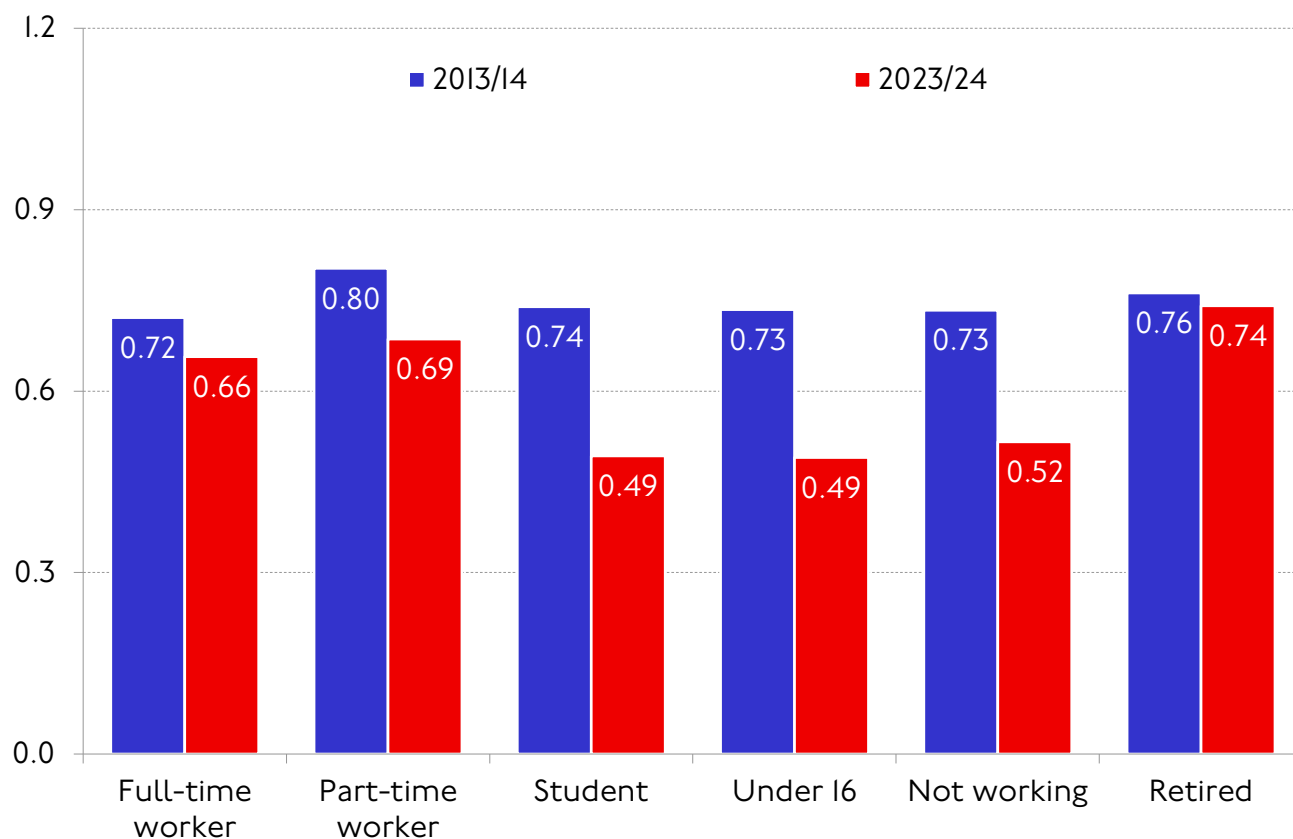


Source: TfL Strategic Analysis, Customer & Strategy.

In 2013/14, the number of leisure trips made per person per day was similar across all age groups, varying only between 0.7 and 0.8 trips (in contrast to shopping/personal business trip rates which increased with age). However, looking at the change between 2013/14 and 2023/24, while all groups experienced a decline over the period, it was noticeably more pronounced for those aged under 25, declining by 34 per cent for those aged 5-16 years and by 33 per cent for those aged 17-24. This compares to declines of between nine and 14 per cent for those aged from 25 to 64, and just five per cent for those aged 65+.

Looking next at leisure trip rates by working status (figure 8), despite leisure trip rates being fairly uniform across the groups in 2013/14, there were greater proportional declines over the decade in leisure trip rates among students, under 16s (both down by 33 per cent) and those who were not working (down by 30 per cent). This compares to smaller declines among workers (a reduction of nine and 15 per cent for full- and part-time workers respectively) and a decrease of three per cent for retired residents.

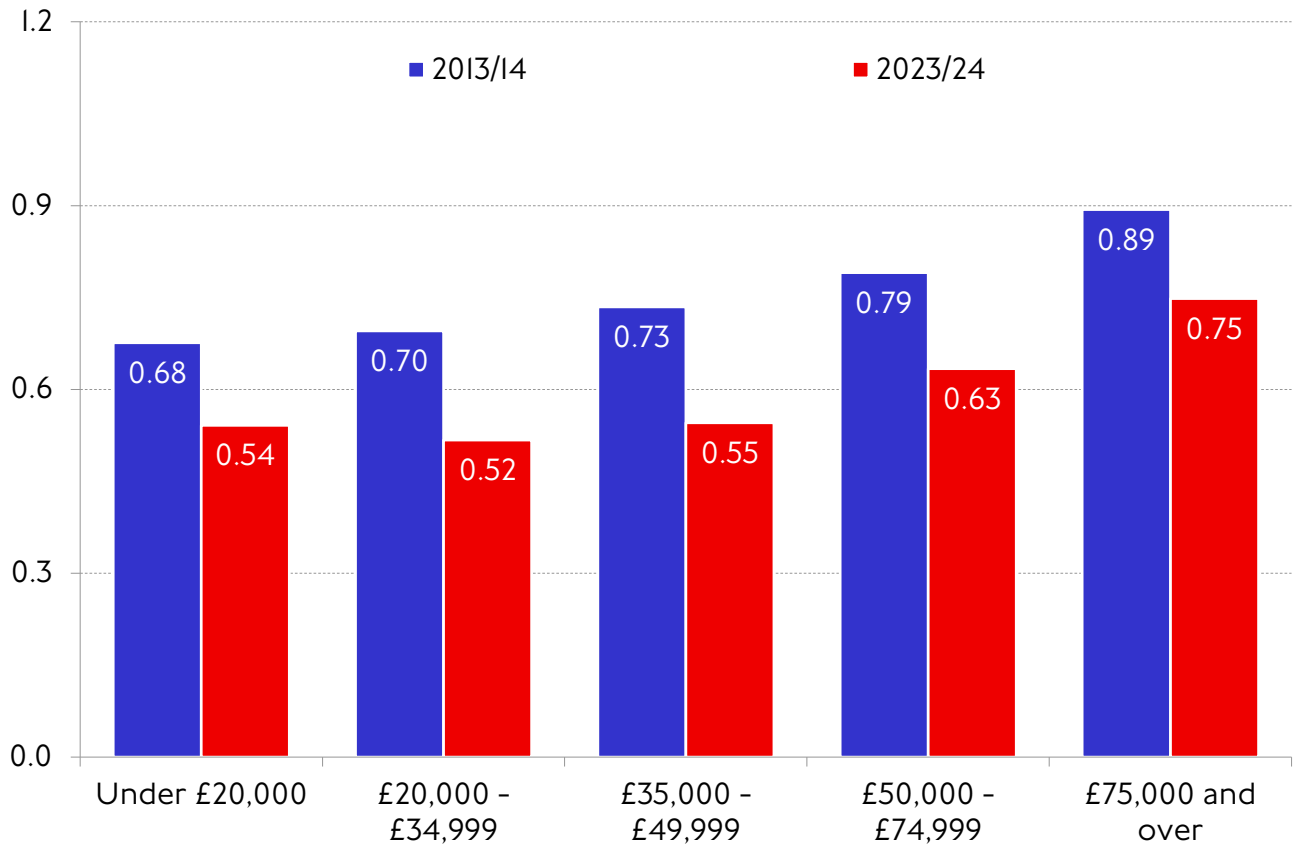
Figure 8 Leisure trips per person per day, by working status, LTDS, 2013/14 versus 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

Looking lastly at leisure trip rates by household income (figure 9), the data for 2013/14 shows that leisure trip rates increased as household income increased, with residents in households with an income of less than £20,000 making 0.68 trips per person per day, compared to 0.89 trips per person per day for residents in households with an income of more than £75,000. While all groups saw a decline in leisure trip rates across the period between 2013/14 and 2023/24, the decline among the highest income group (£75,000 and over) was lower (-16 per cent) compared to the other income groups (with declines ranging between 20 and 26 per cent), suggesting the changes have been driven by cost-of-living pressures.

Figure 9 Leisure trips per person per day, by household income, LTDS, 2013/14 versus 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

## Conclusions

Overall, the analysis of the decline in shopping/personal business and leisure trip rates between 2013/14 and 2023/24 shows that the decreases in shopping/personal business trip rates were more evenly distributed across the London population (with a slightly larger fall among under 25s and a slightly smaller fall among those aged 65+). In contrast, the change in leisure trip rates was more pronounced among those aged under 25, students and those who were not working (acknowledging that there is a degree of overlap within these groups).

This may suggest that the changes in frequency of shopping/personal business trip rates (which started in 2011/12) could have been driven by longer-term changes in the need and ability to travel to carry out shopping/personal business activities, with greater behaviour change among young people. However, the decline in leisure trip rates might have been more driven by cost-of-living pressures affecting individuals and households who are less financially resilient. These age-related differences are also potentially significant in determining and apportioning the underlying causes of trip rate decline and for forecasting travel demand as London's population changes.

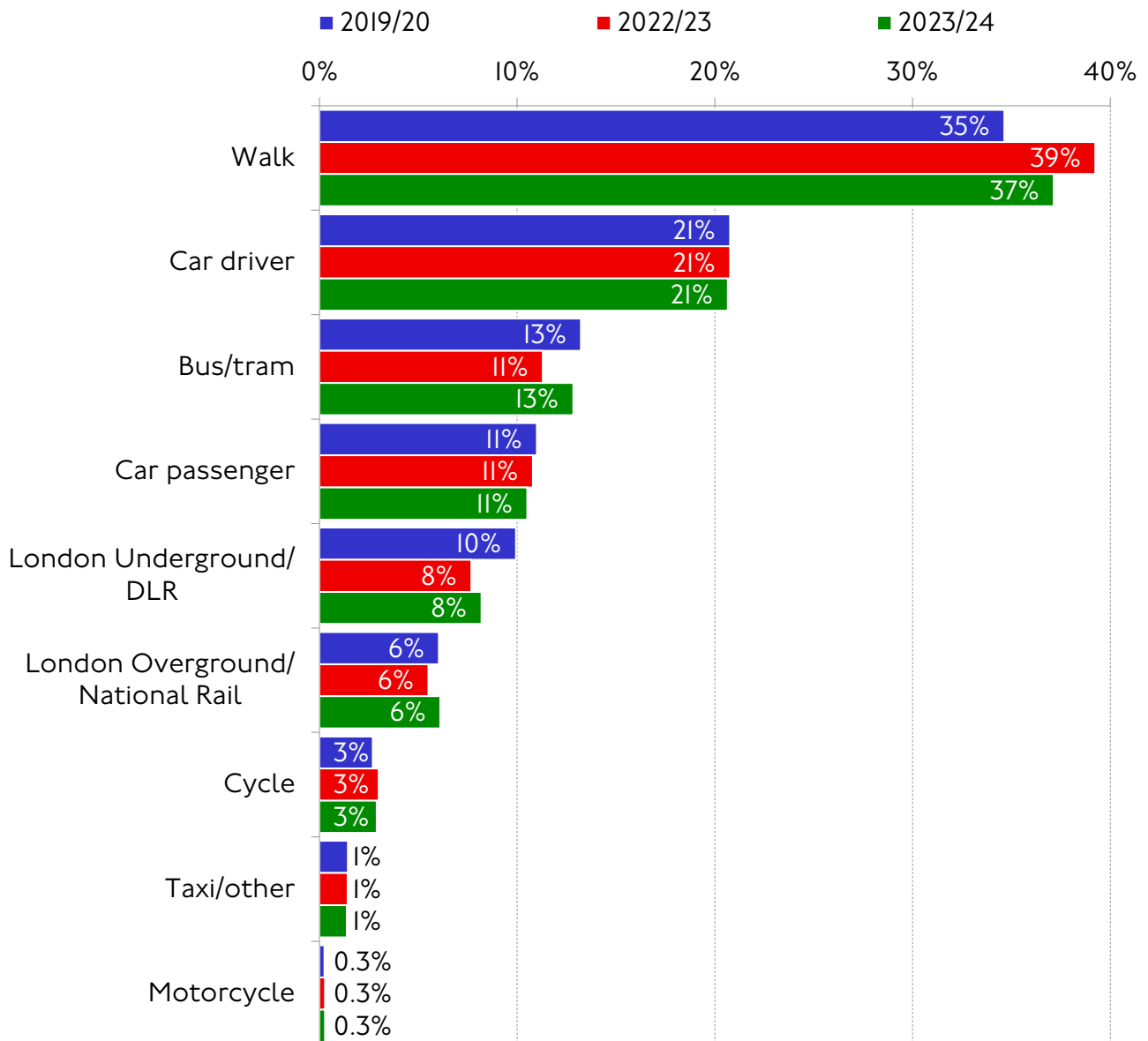


# Trip-based mode and journey purpose shares

## Mode shares

Figure 10 shows the trip-based mode shares of London residents before and after the pandemic. Residents' mode share is a good indicator of progress towards the Mayor's overall ambition for 80 per cent of trips in London to be made by active, efficient and sustainable modes (walking, cycling and public transport) by 2041. However, overall travel in London, to which the 80 per cent ambition applies, also includes travel by non-London residents, which is outside the scope of the London Travel Demand Survey.

Figure 10 Trip-based mode shares, LTDS, 2019/20, 2022/23 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

Before the pandemic, most residents' trips were walking trips or car driver trips (35 and 21 per cent shares, respectively). The combined public transport mode share in 2019/20 was 29 per cent and the cycling mode share was three per cent.

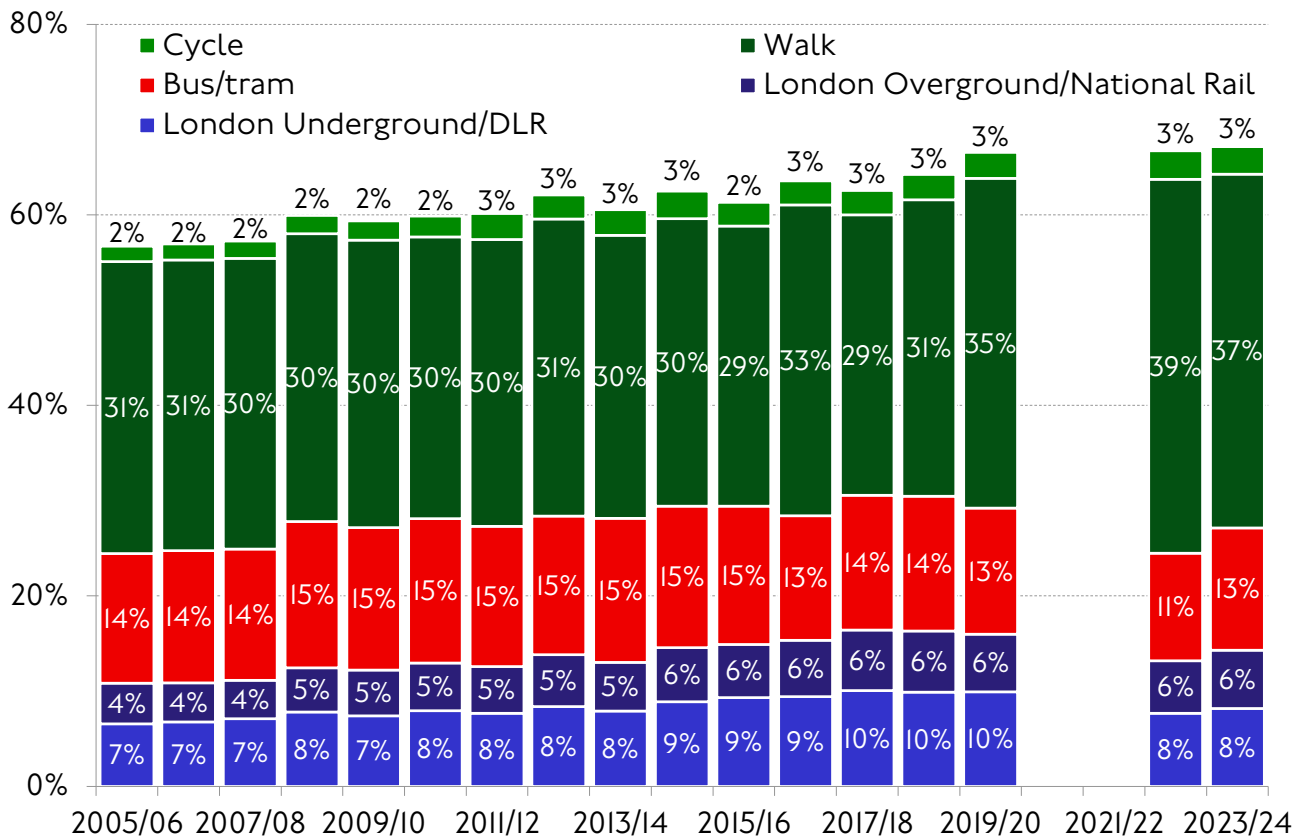
In 2022/23, the key features (relative to 2019/20) were a decrease in public transport mode share, no change in the share of trips made by private modes, and an increase in trips made by active modes, particularly walking. These changes should be seen in the context of a six per cent reduction in the overall trip rate.

In 2023/24, there was a small increase in rail and bus mode shares, leading to a three-percentage point increase in the public transport mode share from 24 per cent to 27 per cent (two percentage points below the pre-pandemic position). The private mode share remained similar to 2022/23, declining by 0.4 percentage points to 33 per cent, and the active travel mode share was down by two percentage points on 2022/23 at 40 per cent, but still three percentage points higher than the pre-pandemic value.

### Active, efficient and sustainable mode share

The proportion of London residents’ trips made by active, efficient and sustainable modes (public transport, walking or cycling) has increased gradually over time, by 10 percentage points from 57 per cent in 2005/06 to 67 per cent in 2019/20 (figure II). This was mostly driven by consistent growth in public transport use (primarily rail) over the period, in addition to an increase in cycling (albeit from a low base). Bus and walk mode shares were relatively more stable over the period.

Figure II Active, efficient and sustainable trip-based mode share, LTDS, 2005/06-2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

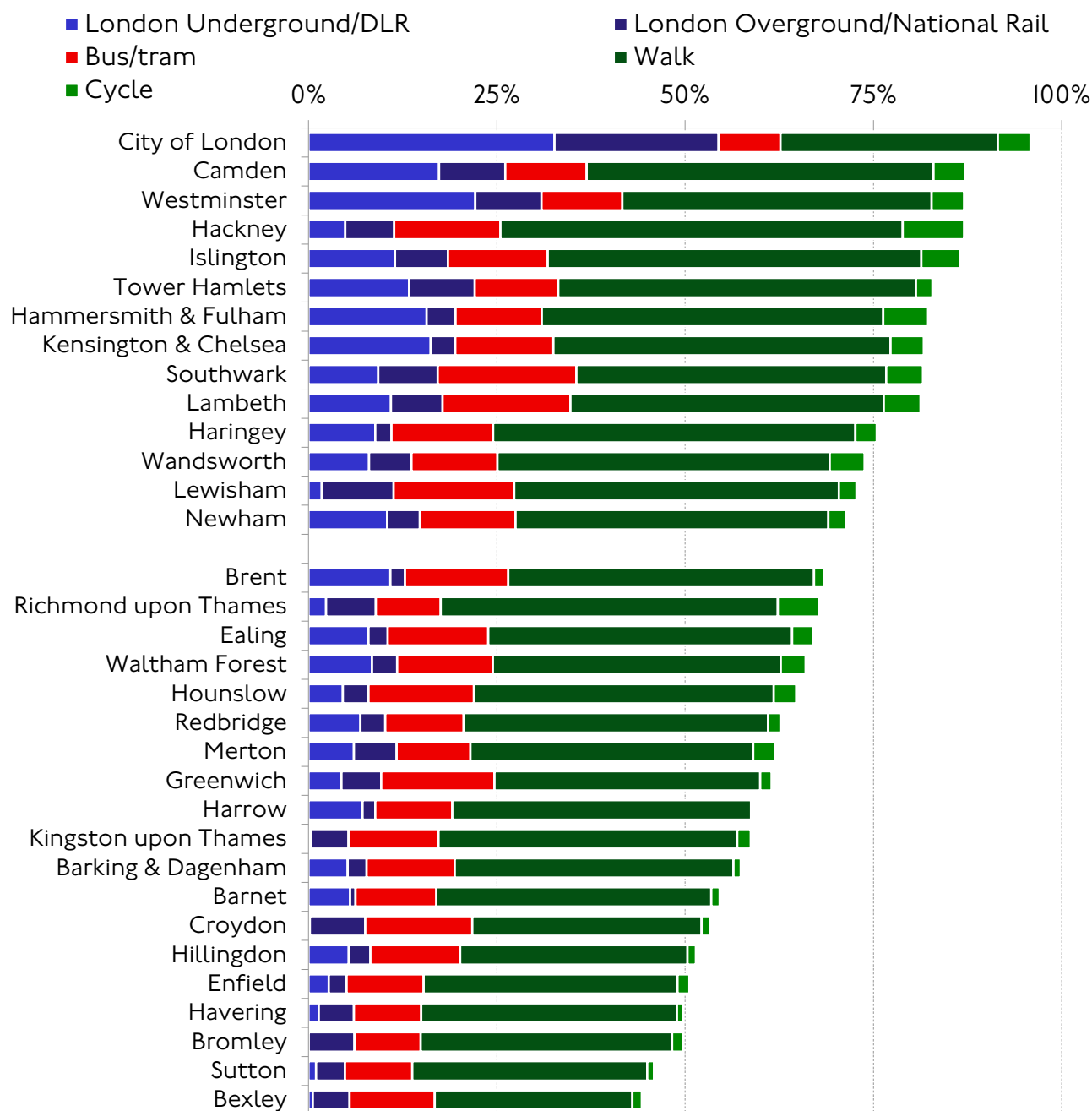
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

Although public transport mode shares decreased during the pandemic, this was compensated by an increase in residents’ active travel mode share, meaning that the net

impact on the active, efficient and sustainable mode share was relatively small. The net outcome in 2022/23 was a slight increase, up to 66.7 per cent compared with 66.6 per cent in 2019/20. In the latest year, there was a further increase to 67.2 per cent. This was driven by an increase in public transport mode shares, particularly bus, and offset by a fall in walking mode share (in the context of a ten per cent decrease in trip rates). Therefore, despite people making fewer trips on average, the percentage of trips made by active, efficient and sustainable modes still increased, albeit gradually.

Figure I2 shows the active, efficient and sustainable mode share at the borough level for inner London and outer London boroughs.

Figure I2 Active, efficient and sustainable trip-based mode share by borough of trip origin (inner London boroughs followed by outer London boroughs), LTDS, two-year average 2022/23-2023/24.



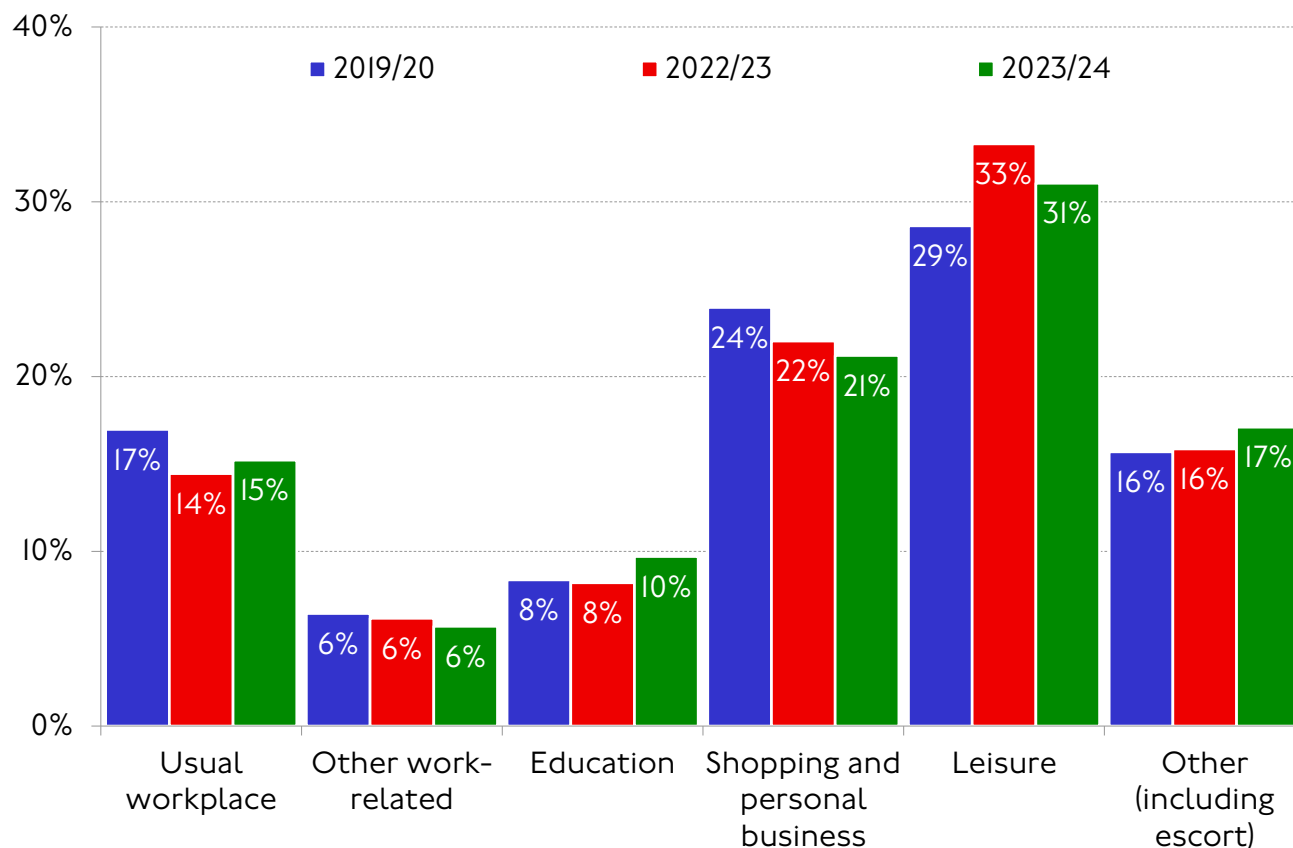
Source: TfL Strategic Analysis, Customer & Strategy.

The graph shows trips (by London residents only) that start in each borough, and this demonstrates the scope that exists to improve this measure. The proportion of residents' trips made by active, efficient and sustainable modes starting in inner London boroughs ranged from 71 to 96 per cent, compared to outer London boroughs, where the range was from 44 to 68 per cent. Although each borough has a unique set of circumstances that determine these shares and affects the ability to change them, the scope for change, from smallest to largest, is evident.

## Journey purpose shares

Figure 13 shows that, prior to the pandemic in 2019/20, around 17 per cent of trips by London residents were for commuting and a further six per cent of trips were work-related (for example travelling to a meeting). The commuting share decreased to 14 per cent in 2022/23, the lowest level since the LTDS began in 2005/06. In 2023/24 the share of commuting trips increased slightly, to 15 per cent. The share of work-related trips has decreased since 2019/20 but was still broadly around six per cent. The highest proportion of trips in 2019/20 were for leisure purposes (29 per cent), and this was still the case in 2023/24 (31 per cent) despite a decrease in the latest year. The share of shopping/personal business trips also decreased slightly between 2022/23 and 2023/24, from 22 per cent to 21 per cent of all trips. However, there were small increases in the shares of education and other trips. It is important to note that these relatively small changes in purpose share occurred against the backdrop of falling overall trip rates.

Figure 13 Proportion of trips by journey purpose, LTDS, 2019/20, 2022/23 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

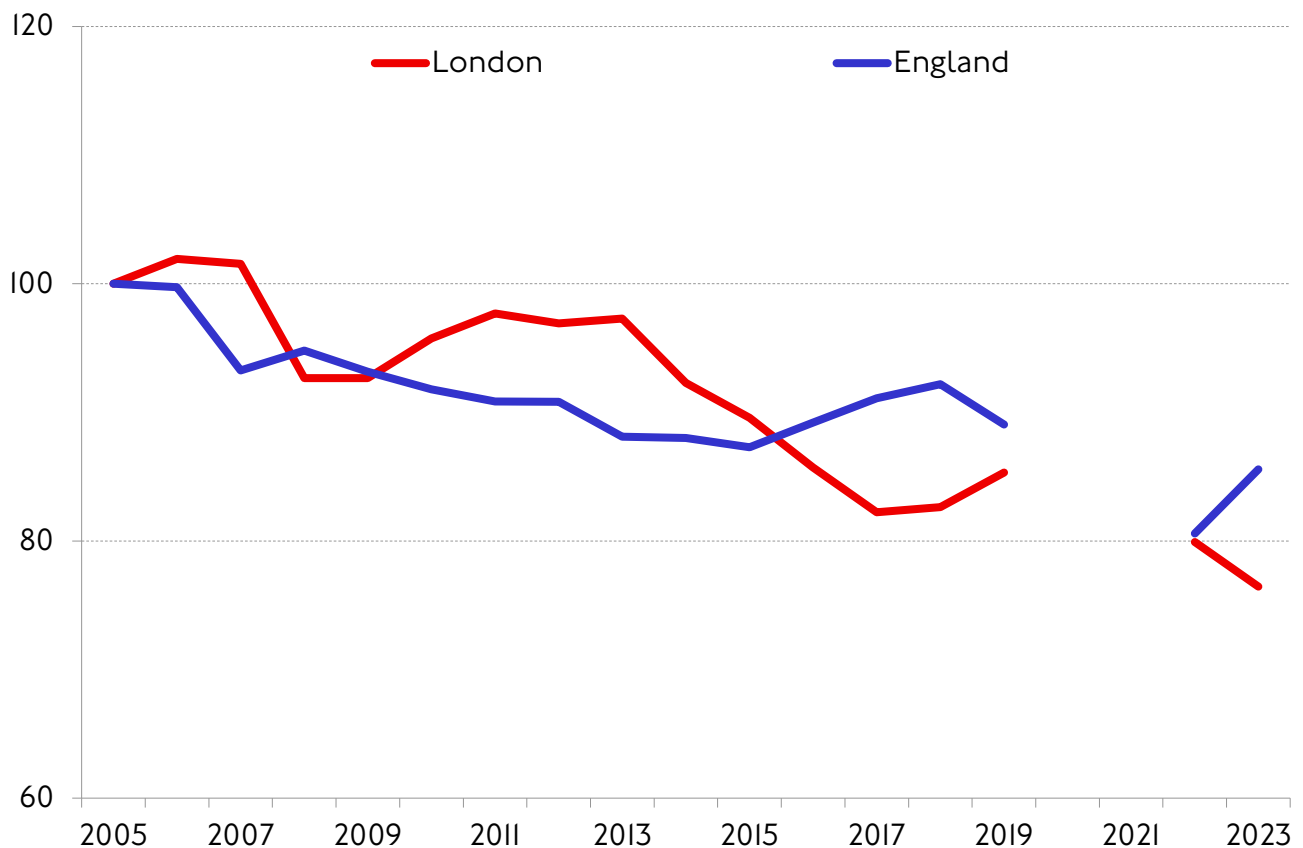
## Comparisons with the National Travel Survey

It is useful to compare key travel behaviour trends in London with results from the National Travel Survey (NTS). The NTS is a household survey which monitors the long-term trends in personal travel by residents of England. NTS 2023 was the first year since 2019 to operate with full face-to-face data collection. The number of households invited to take part in the NTS was increased in 2023, resulting in a sample size of 7,426 households for the whole of England compared to 4,294 households in 2022. In London the number of households that took part in the LTDS was 7,531 in 2023/24. Note that the NTS runs in calendar years whereas the LTDS runs in financial years and that the NTS data reported below for England includes responses from London households.

### Trip rates

Figure I4 shows the indexed trend in overall trip rates for residents of London and England since 2005 (or 2005/06).

Figure I4 Change (index: 2005 = 100) in trip rate, London versus England residents, LTDS and NTS.



Source: TfL Strategic Analysis, Customer & Strategy.

Note: Comparable data is missing for 2020 and 2021 due to the impacts of the coronavirus pandemic.

The data shows that trip rates for residents of London and England decreased gradually over the period from 2005 to 2019. For residents of England the decrease was 11 per cent over this period and for London residents it was 15 per cent. In the latest two years, trip

rates have remained below 2019 levels for residents of London and England, however between 2022 and 2023, trip rates increased in England and decreased in London. Trip rates in 2023 in London were 10 per cent below 2019 levels whereas trip rates in England were four per cent below 2019 levels. Therefore, the number of trips made per person per day had not returned to pre-pandemic levels in 2023(/24) for London or England, however the broad trends since 2005 are similar.

## Trip rates by mode

Table 2 shows the change in trip rates by mode between 2019 (or 2019/20) and 2023 (or 2023/24) for London and England residents. The key points are:

- In both London and England, trip rates on all public transport modes remained below 2019 levels. However, the magnitude of change differed between the two areas.
- Trip rates by private modes also remained below 2019 levels in both London and England, except for motorcycles in England. The proportional decline for private modes was greater in London compared to England.
- In England, walking trip rates remained above 2019 levels, whereas cycling trip rates were five per cent below 2019 levels in 2023. In London, walking and cycling trip rates remained four per cent lower than 2019/20 levels respectively (following increases in the previous year to 2022/23).

Table 2 Change (from 2019 or 2019/20) in trip rates by London and England residents, by mode, 2023 or 2023/24.

Mode (London)	Change from 2019/20 to 2023/24 (London)	Mode (England)	Change from 2019 to 2023 (England)
National Rail	-10%	Surface rail	-14%
Underground/DLR	-26%	-	-
Bus/tram	-13%	Bus	-21%
Taxi or minicab	-14%	Taxi or minicab	-16%
Car driver	-11%	Car driver	-4%
Car passenger	-14%	Car passenger	-8%
Motorcycle	-4%	Motorcycle	4%
Cycle	-4%	Cycle	-5%
Walk	-4%	Walk	5%

Source: TfL Strategic Analysis, Customer & Strategy and National Travel Survey.

## Trip rates by purpose

For trip rates by purpose, the key comparisons between London and England residents are as follows and summarised in table 3:

- The magnitude of change in commuting trip rates in London and England was similar, with reductions of 16 per cent in England and 20 per cent in London since 2019.
- For other work trips, the change since 2019 was similar, with declines of 21 per cent in London and 27 per cent in England. This indicates that in London and at the national scale, people were making fewer trips on average for commuting and other work-related travel in 2023 compared to 2019.
- Since 2019, there was a decline in shopping/personal business and leisure trips in London and England, although there was a greater proportional decline in London for both types of trips compared to England.
- The trends for education and other trip rates differed in London and England. In London there was a slight increase of four per cent in education trip rates since 2019 and a decline of two per cent in other trip rates. In England, education trip rates have declined by six per cent while other trip rates have increased by 11 per cent since 2019.

**Table 3** Change (from 2019 or 2019/20) in trip rates by London and England residents, by purpose, 2023 or 2023/24.

<b>Journey purpose</b>	<b>Change from 2019/20 to 2023/24 (London)</b>	<b>Change from 2019 to 2023 (England)</b>
Commuting	-20%	-16%
Other work	-21%	-27%
Education	4%	-6%
Shopping and personal business	-21%	-8%
Leisure	-3%	-1%
Other (including escort)	-2%	11%

Source: TfL Strategic Analysis, Customer & Strategy and National Travel Survey.

## Mode share

Figure I5 shows the trip-based mode share for trips by London and England residents in 2019 and 2023 (or equivalent financial years). The data shows that mode shares are considerably different in London and England, and this is to be expected given the differences in transport policy and provision, particularly the availability and density of public transport networks.

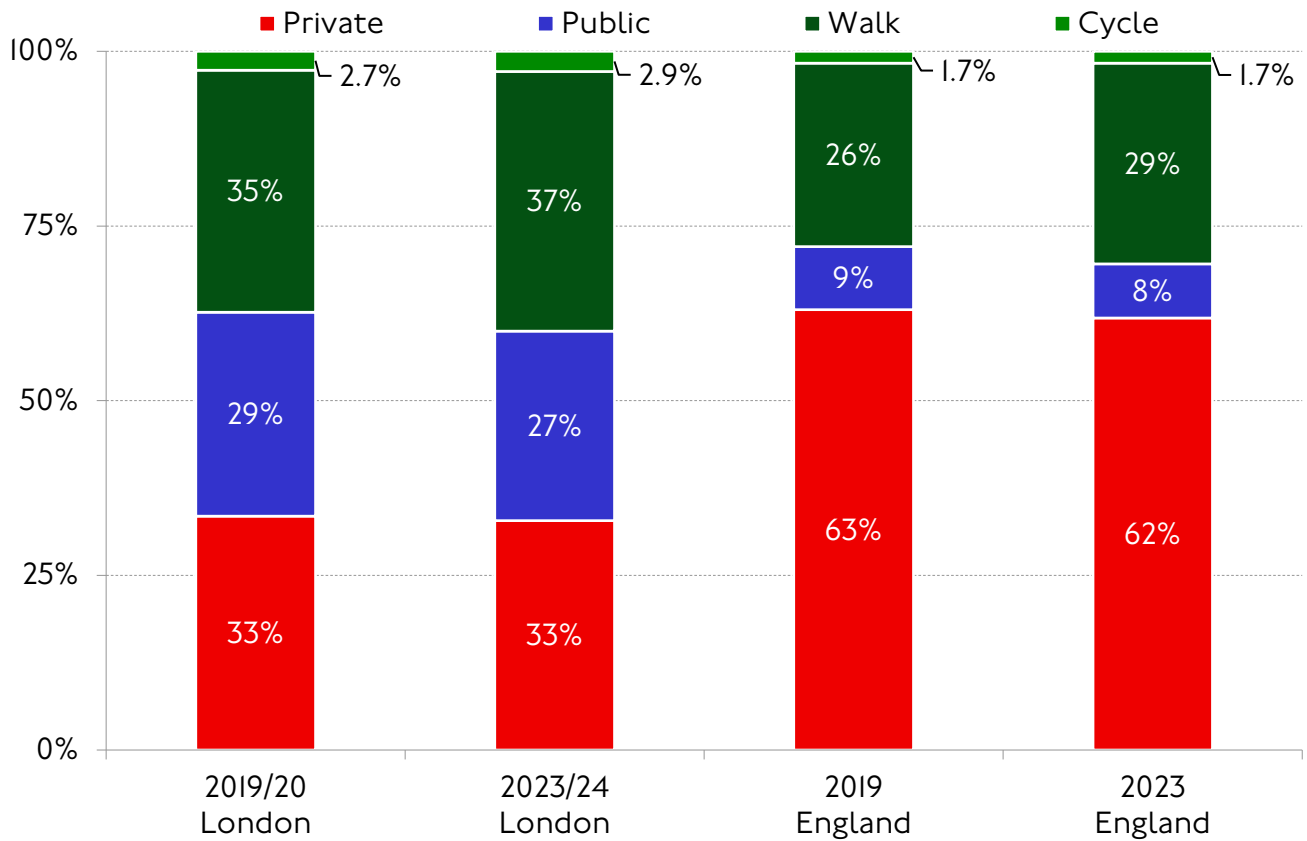
The mode share of private vehicles in London was roughly half of that in England, while public transport accounted for 27 per cent of trips in 2023/24, compared to just eight per cent of trips in England in 2023. Walking mode shares were also much higher in London than in England, at 37 per cent in 2023/24 compared to 29 per cent in England in 2023 and three per cent for cycling compared to two per cent in England.

Overall there were not any significant changes in mode share between 2019 and 2023 in either London or England, but the key trends in England were as follows:

- A slight decrease in public transport mode share in 2023 compared to 2019 (down by 1.3 percentage points).

- A slight decrease of 1.2 percentage points in the private mode share in 2023 compared to 2019.
- Walking and cycling mode shares remained equal to or higher than 2019 levels.

Figure I5 Trip-based mode share, London versus England residents, LTDS and NTS, 2019 or 2019/20 versus 2023 or 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy and National Travel Survey.

## Summary

The key findings from the comparison of London-based travel behaviour trends with the national data are:

- Trip rates have been declining gradually in London and England over the period since 2005 (or 2005/06). In 2023 (or 2023/24), trip rates had not returned to pre-pandemic levels in either London or England, however the proportional decline against 2019 levels was greater in London (-10 per cent) than it was in England (-4 per cent).
- Public transport trip rates in London and England remained below 2019 levels. Private transport trip rates in England and London remained below 2019 levels, with the exception of motorcycles in England. The trends in active transport trip rates differed between London and England.
- By journey purpose, people are travelling less often on average for commuting and other work-related travel in London and England, and the magnitude of change in trip rates was similar (between 16 and 20 per cent for commuting and between 21 and 27 per cent for other work-related trips in 2023 or 2023/24 against 2019 or 2019/20 levels).



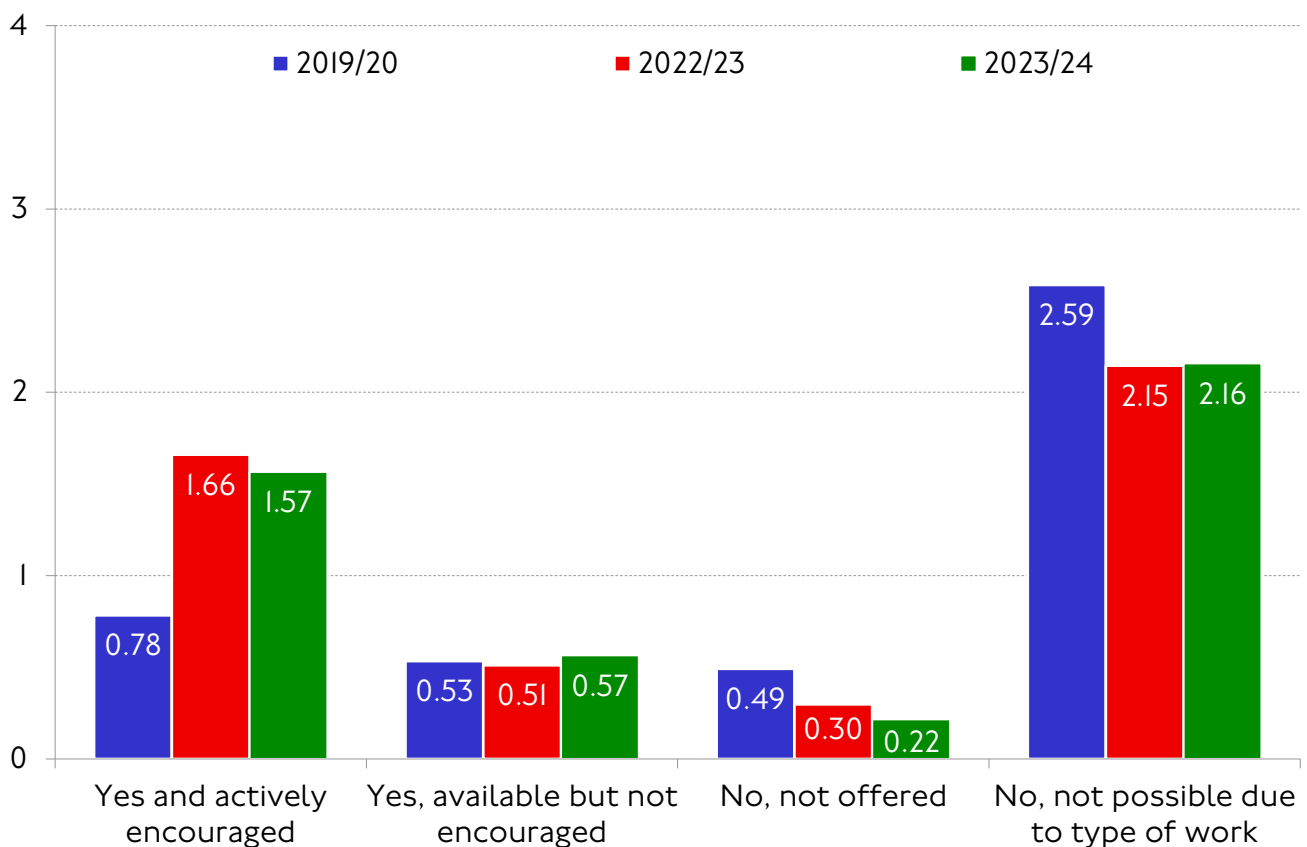
- However, there was a greater proportional decline in shopping/personal business and leisure trip rates between 2019 (or 2019/20) and 2023 (or 2023/24) in London compared to in England.
- The mode share of trips differs considerably between London and England, with much higher public transport and active travel shares in London (as well as lower private transport mode shares), although this is to be expected given the differences in transport policy and provision. There have not been any significant changes in mode share at this aggregated level since 2019 in either London or England.

## Remote and hybrid working

Remote and hybrid working is one factor potentially affecting travel that came to greater attention during and after the pandemic, although the extent to which this has become embedded for the long term is still relatively unclear. Hybrid working, where this replaces a previously typical ‘five-day office week’ might be expected to lead to a reduction in commute trips but could also be compensated by an increase in other trips (for example local personal business trips), the two groups of trips being potentially quite different in character (distance, time of day and modes used).

Figure I6 shows how the ability to work from home has changed since the pandemic among working London residents.

Figure I6 London resident workers (in millions) by ability to work from home, LTDS, 2019/20, 2022/23 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

The number of London resident workers who were able to work from home (and were encouraged to do so) doubled between 2019/20 and 2023/24, from 0.78 million to 1.57 million, with a slight decline in the latest year. This is equivalent to around 35 per cent of resident workers. Around half a million workers (13 per cent) could work from home but were not encouraged to do so. A further 2.37 million workers (53 per cent) could not work from home, either because it was not offered or due to the type of job they do.

According to the Office for National Statistics Opinions and Lifestyle Survey, workers in the highest income bands, those who are educated to degree level or above and those in professional occupations are most likely to work from home (either all the time or as a

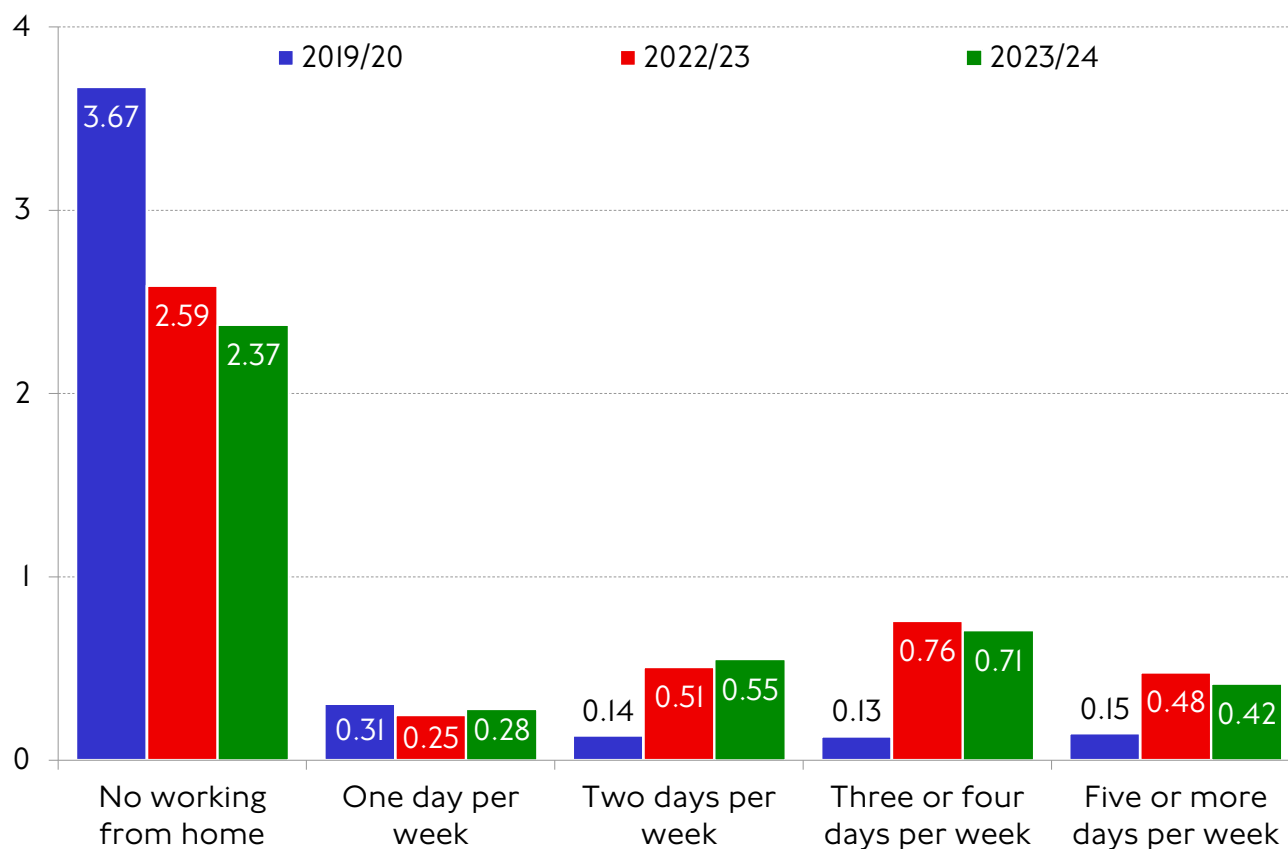
hybrid worker). Self-employed workers, parents of dependent children and those who commute to work by rail or Underground are also more likely to work from home, whereas younger workers are less likely to work from home compared to older workers. Jobs based in workplaces in London and the South East are much more likely to be possible to do from home compared to the rest of the UK, due to a higher proportion of professional occupations in the region.

The post-pandemic increase in the ability to work from home remains a significant influence on travel patterns in London (particularly on weekdays and for trips to/from central London). The Centre for Cities report [Return to the office: how London compares to other global cities, and why this matters](#) shows that while office attendance in London has increased steadily since the pandemic, it lagged behind other global cities. In mid-2024 the average number of days worked in the office in London was 2.7, compared to 3.5 days in Paris and 3.1 days in New York.

Furthermore, there is evidence that non-London commuters are more likely to work from home than London resident workers. In June 2024, central London office workers living within Greater London attended the office on 2.9 days per week on average compared to 2.1 days per week for those living outside Greater London.

Figure 17 shows the number of days that London residents in employment worked from home in a typical week.

Figure 17 London resident workers (in millions) by number of days working from home in a typical week, LTDS, 2019/20, 2022/23 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

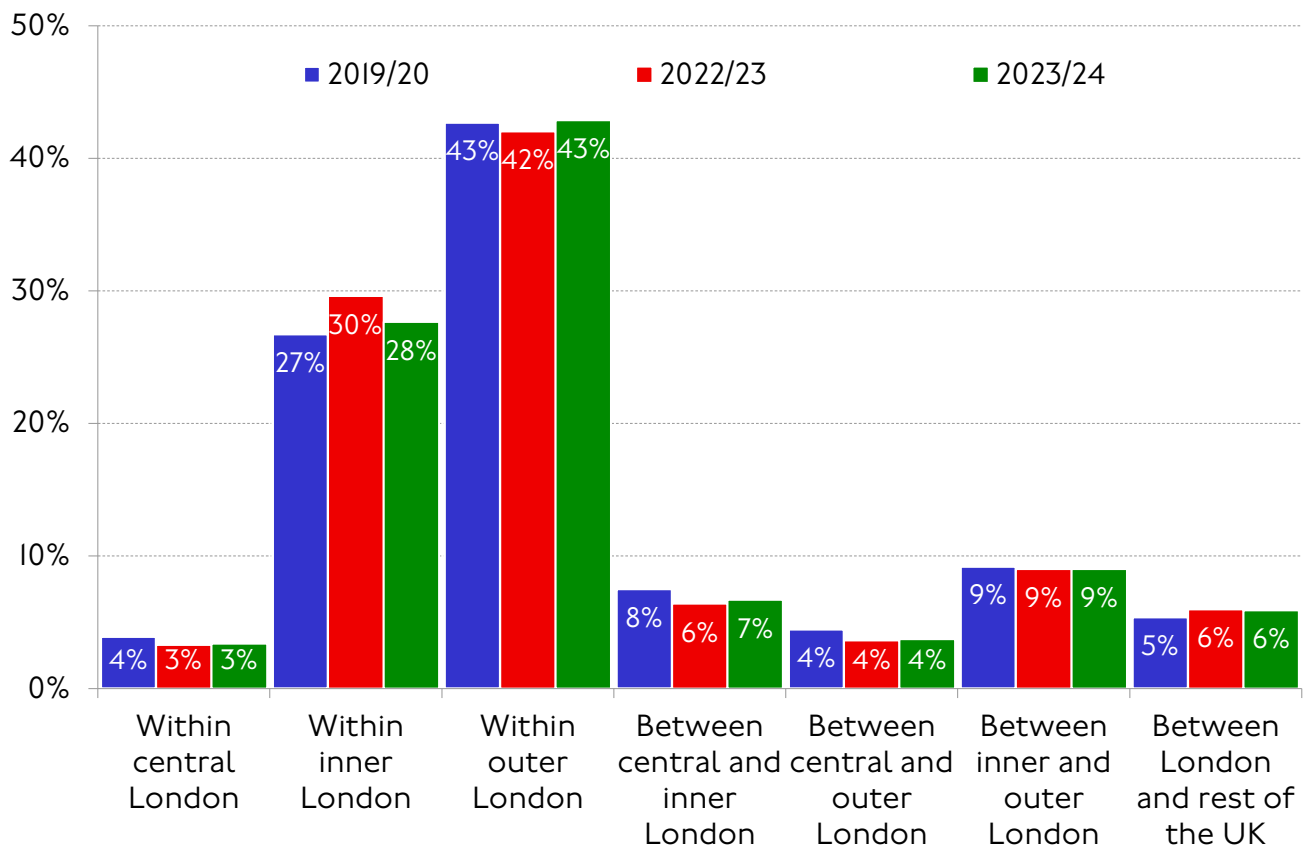
Between 2019/20 and 2023/24 there was a 35 per cent decrease in the number of people that did not work from home at all, from 3.67 million workers in 2019/20 to 2.37 million workers in 2023/24 (but still accounting for the majority of resident workers). Among

those who did work from home, the most common frequency was three or four days per week (for around 700,000 workers), with just less than half a million workers spending five or more days per week working from home.

## Travel by London area

Most trips by London residents that take place within London are wholly within the same area, with 28 per cent taking place wholly within inner London and a further 43 per cent wholly within outer London in 2023/24 (see figure 18). Trips to, from and within central London accounted for only 14 per cent of all residents' trips (down from 16 per cent in 2019/20) while a greater proportion of resident trips were wholly within inner London or outer London (71 per cent in 2023/24 compared to 69 per cent in 2019/20).

Figure 18 Proportion of trips by area of origin and destination, LTDS, 2019/20, 2022/23 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

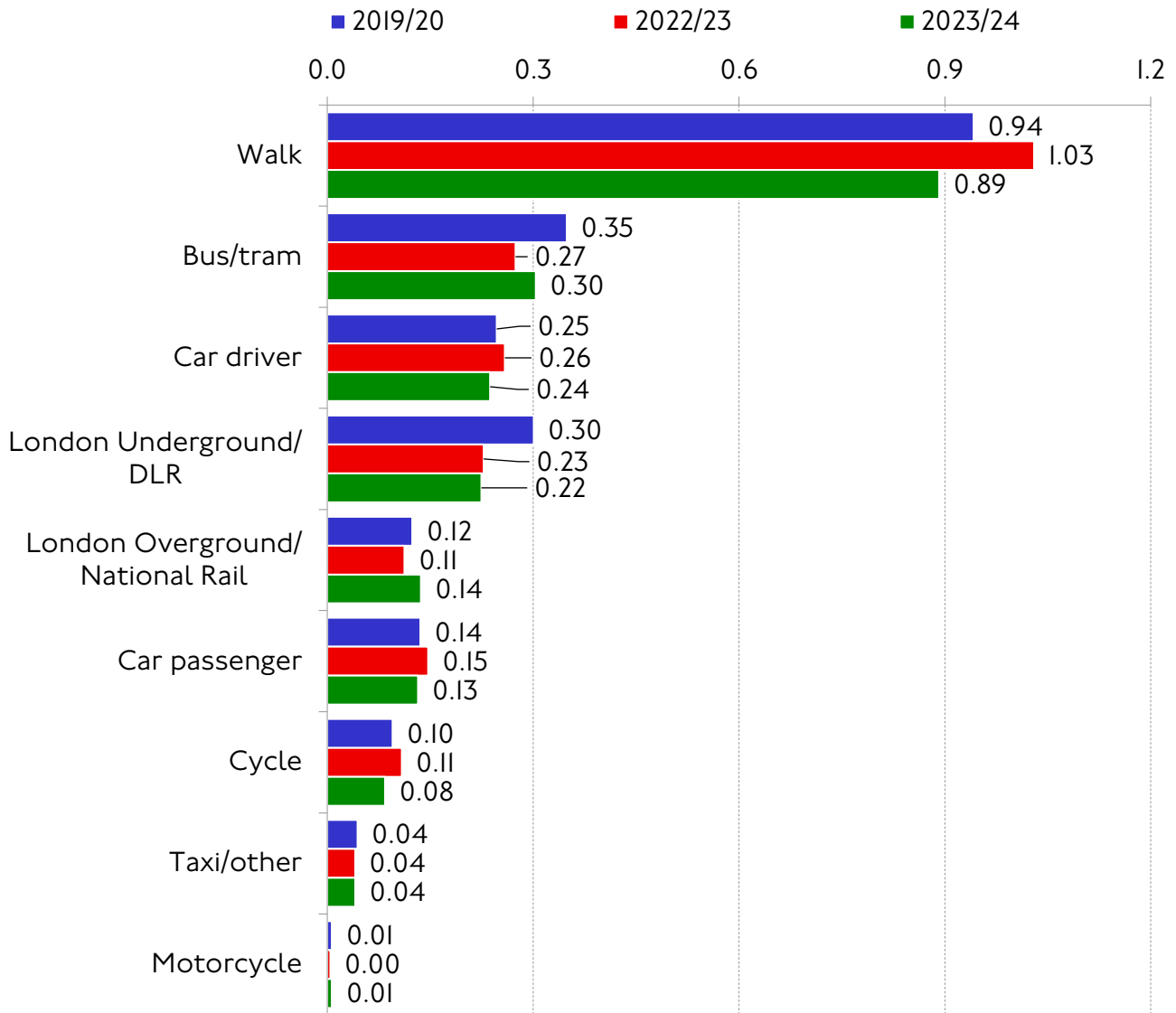
Figures 19 and 20 show trip rates by mode for residents of inner London and outer London respectively.

Trip rates by inner London residents (figure 19) were highest for walking, despite a fall in walk trip rates in the latest year (consistent with the London-wide trend).

Although public transport trip rates were lower in 2022/23 compared to the pre-pandemic position in 2019/20, there was a slight recovery of trip rates on London Overground/National Rail and buses in the latest year. London Overground/National Rail trip rates were 10 per cent higher in 2023/24 than they were in 2019/20, although bus trip rates remained lower than in 2019/20. Conversely there was a one per cent fall in London Underground/DLR trip rates in the latest year. Car driver and car passenger trip rates were down by eight and 10 per cent respectively, corresponding to a decrease of four and three per cent on 2019/20. Cycle trip rates decreased slightly in the latest year.

In 2023/24, inner London residents made seven per cent more trips per day than outer London residents. Before the pandemic the difference was three per cent, and until 2009/10 outer London residents' trip rates were higher than inner London residents' trip rates.

Figure 19 Trips per person per day by inner London residents, by mode, LTDS, 2019/20, 2022/23 and 2023/24.

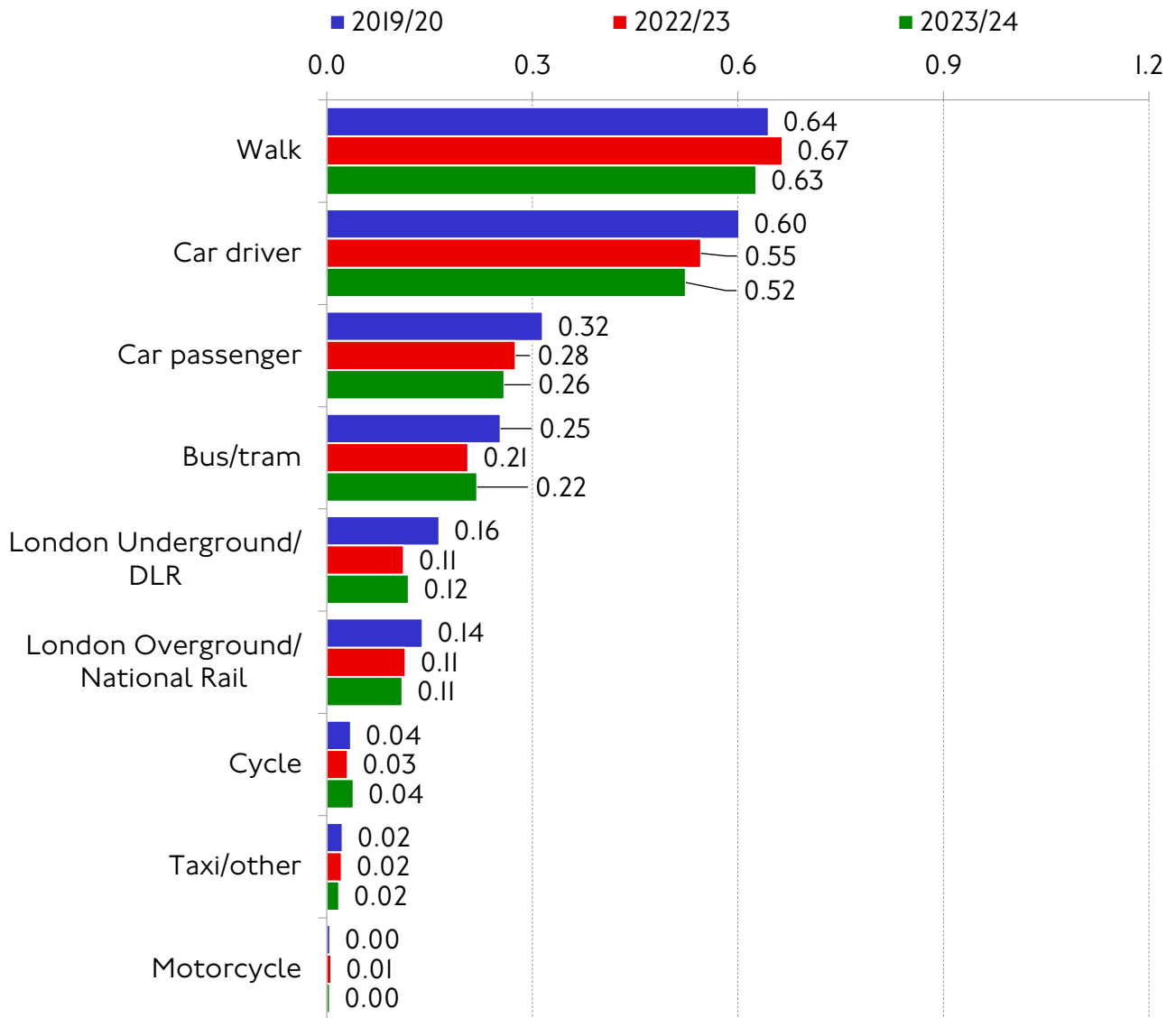


Source: TfL Strategic Analysis, Customer & Strategy.

Trip rates for outer London residents were also highest for walking, although they are 30 per cent lower than walk trip rates by inner London residents and also saw a fall in the latest year (figure 20).

On public transport, London Underground/DLR and bus trip rates increased by six per cent in the latest year, although there was a decline of four per cent on London Overground/National Rail. Trip rates on all public transport modes were lower than in 2019/20 (and outer London residents made 32 per cent fewer public transport trips per person compared to inner London residents). Car driver and car passenger trip rates declined in the latest year and were both lower than in 2019/20, however car driver trip rates were still more than twice as high for outer London residents compared to inner London residents. Cycle trip rates increased slightly in the latest year.

Figure 20 Trips per person per day by outer London residents, by mode, LTDS, 2019/20, 2022/23 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

## Trip lengths and durations

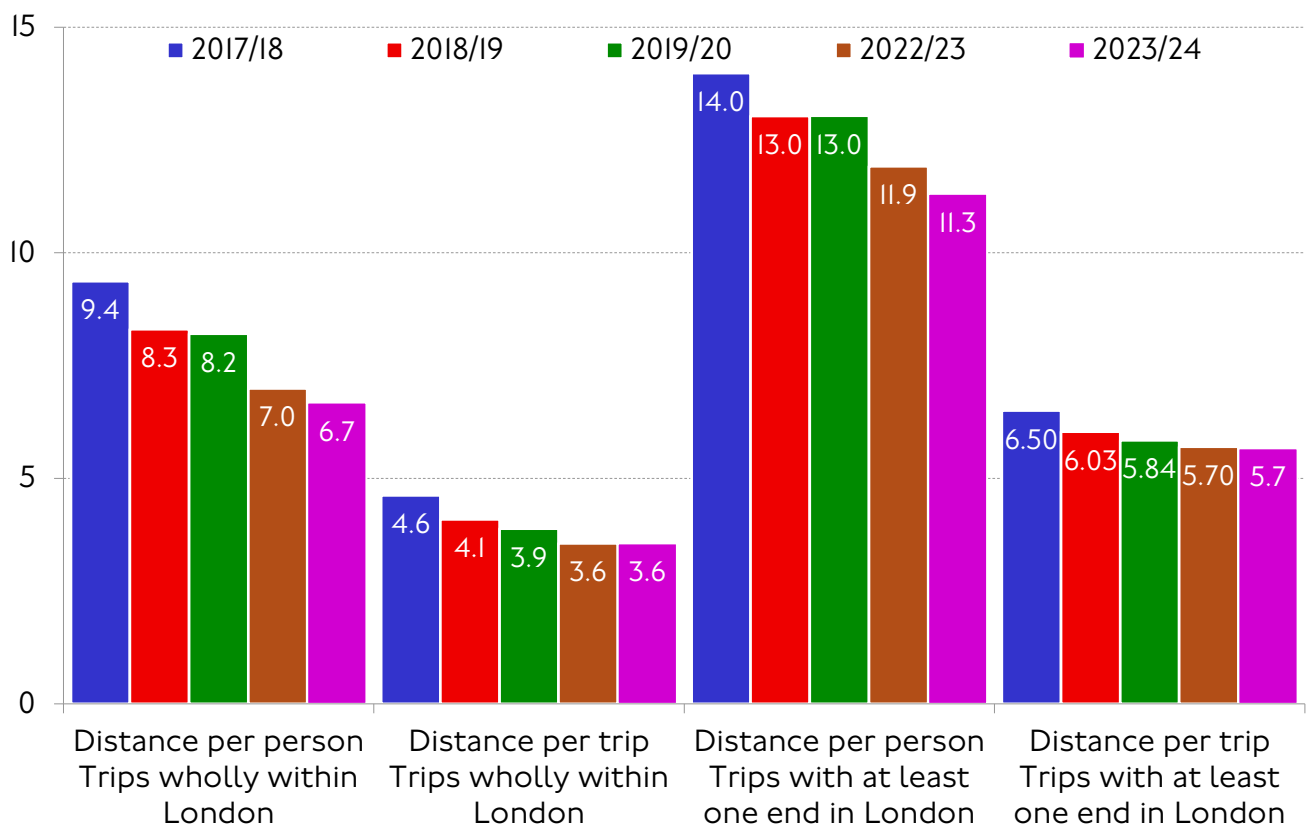
The average distance travelled per person per day in 2023/24 was 11.3km (including trips to, from and within Greater London). This was a reduction of 13 per cent compared to 2019/20. The average trip distance also decreased, although by just four per cent (from 5.8km to 5.7km), showing that most of the reduction in distance per person was caused by residents making fewer trips.

At the national scale, the average trip distance was greater (10.4km in 2023), resulting in generally higher distances travelled per person. In 2023 the average distance travelled per person per day was 26.3km, an increase of 11 per cent since 2022 but eight per cent lower than in 2019.

For trips wholly within Greater London, the average distance travelled per person declined by 19 per cent between 2019/20 and 2023/24, from 8.2km to 6.7km per day, with the average distance per trip declining by eight per cent from 3.9km to 3.6km (figure 21).

While the pandemic has undoubtedly affected the distance that London residents travel, the trend even before the pandemic was that trips were getting shorter, which combined with declining trip rates, led to London residents travelling shorter distances overall.

Figure 21 Distance (in kilometres) travelled per person per day and per trip, by trip origin and destination area, LTDS, 2017/18-2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

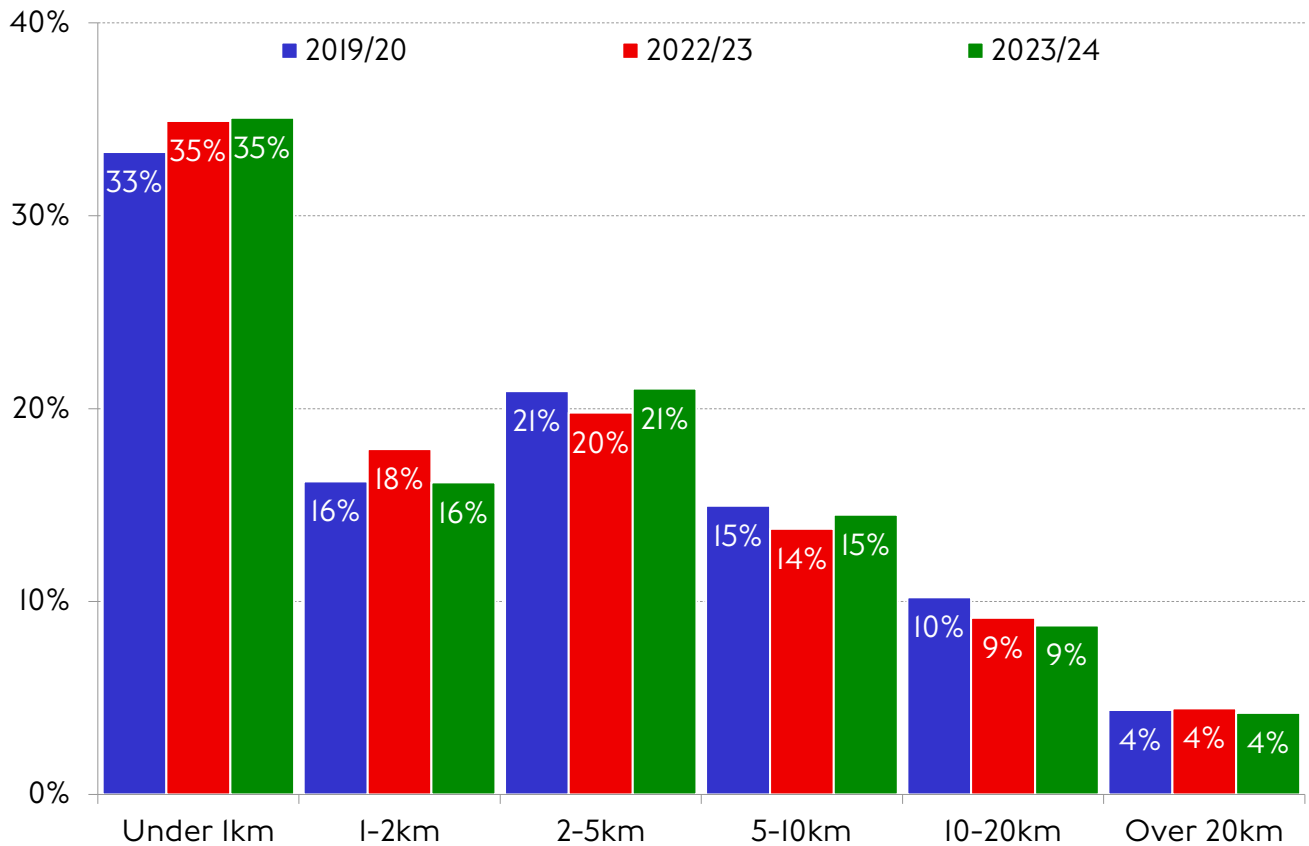
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

Most trips by London residents are short in length. In 2023/24, 35 per cent of trips were less than 1km and a further 16 per cent were between 1-2km. Only 13 per cent of all trips



by London residents were longer than 10km, and almost three quarters of all trips were under 5km in length. This included trips to and from Greater London to other parts of the country. The trend over the last year was a very slight increase in the share of trips under 1km, a decline in the share of trips between 1-2km, an increase in share of trips between 2-10km and a decline in trips over 10km (figure 22).

Figure 22 Proportion of trips by length, LTDS, 2019/20, 2022/23 and 2023/24.

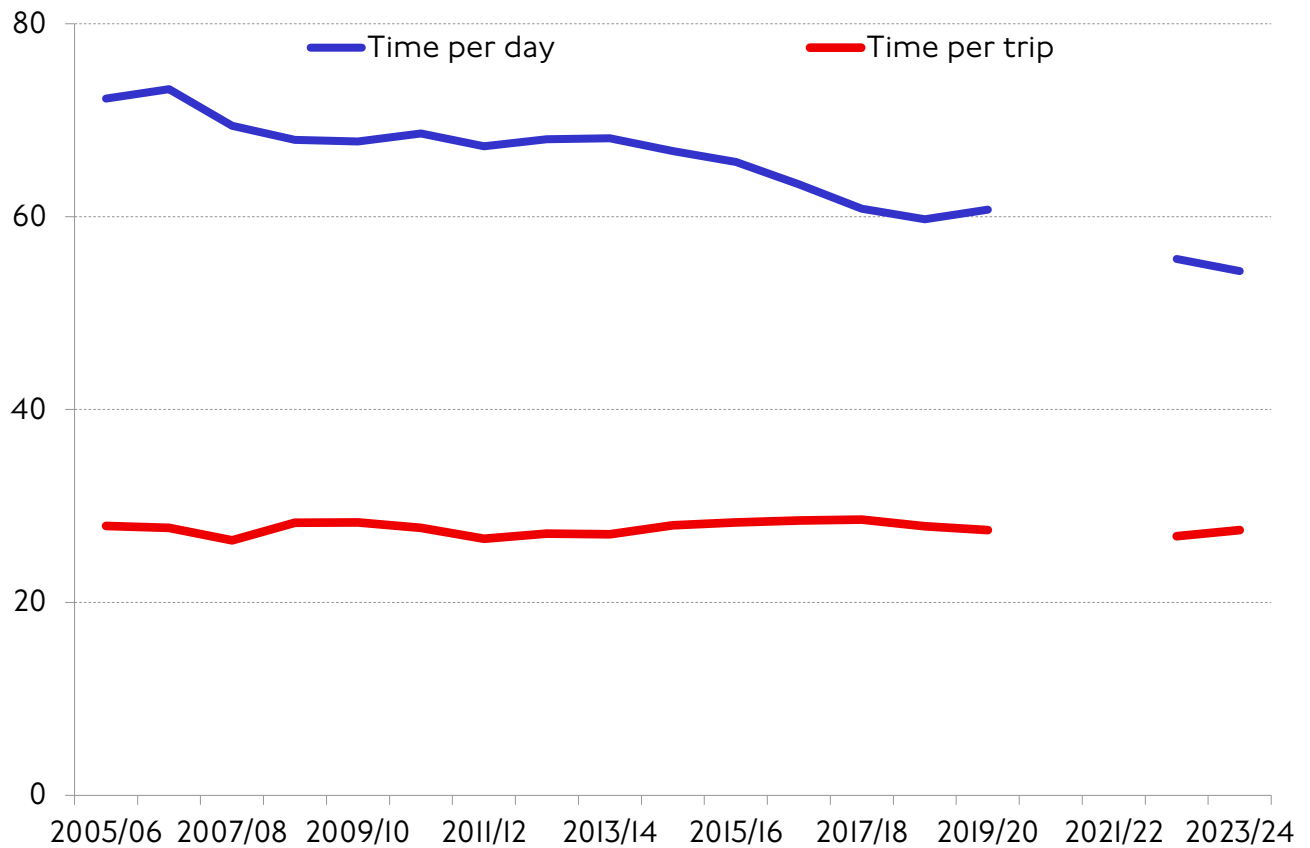


Source: TfL Strategic Analysis, Customer & Strategy.  
 Note: This graph includes trips to, from or within London.

Figure 23 shows how the length of time London residents spend travelling has changed over time. Interestingly, there has been a gradual decline in the total length of time spent travelling, decreasing from 72 minutes per person per day in 2005/06 to 61 minutes in 2019/20. In 2022/23, this declined to 56 minutes, the first time that the average time spent travelling per day was under one hour. In 2023/24, there was a further decline to 54 minutes per day.

However, the average trip duration changed very little over the same time period, suggesting that London residents are travelling less overall but are still travelling for the same length of time when they do make a trip. In 2023/24, the average duration of a trip increased slightly to 27.5 minutes.

Figure 23 Average time spent travelling per person per day and average trip duration (in minutes), LTDS, 2005/06-2023/24.



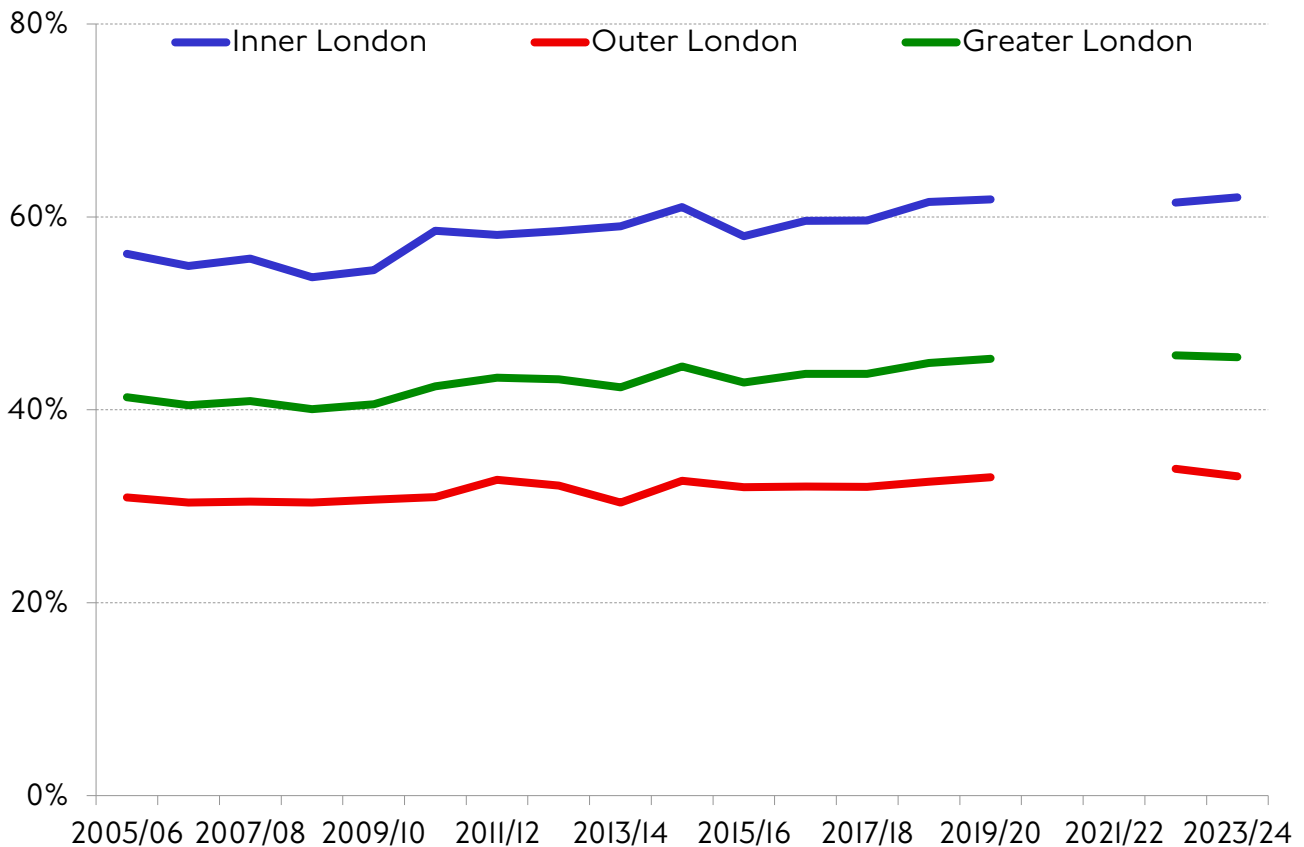
Source: TfL Strategic Analysis, Customer & Strategy.

Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

## Household car ownership

Overall in London there has been a decrease in car ownership over the long term, with the proportion of households not owning a car increasing from 41 per cent in 2005/06 to 45 per cent in 2023/24 (figure 24).

Figure 24 Proportion of London households that do not own a car, by London area, LTDS, 2005/06-2023/24.



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, more than 60 per cent of households in inner London did not own a car, an increase of six percentage points since 2005/06. Car ownership rates were higher in outer London, but the long-term trend here has been a two-percentage point decrease in car-owning households since 2005/06. The proportion of households owning multiple cars has also declined in all areas of London.

Since the pandemic, there has been a slight increase in the proportion of households with no cars and a decrease in the proportion of households with two or more cars. However, there has also been a very small increase (less than one percentage point) in the proportion of households with one car. These trends have occurred in both inner and outer London. Data for 2023/24 showed that the proportion of households without access to a car was 62 per cent in inner London and 33 per cent in outer London (45 per cent for Greater London).

A number of factors are thought to be influencing this, including (over the long term) improvements to public transport and the reallocation of road space towards active, efficient and sustainable modes which have encouraged a shift to walking, cycling and

public transport which could have enabled some Londoners to live without, or with fewer, cars. More recently there has been a reduction in young Londoners learning to drive, which has been further impacted by cost-of-living pressures. Lifestyle changes arising from the pandemic, such as increased working from home and a reduction in trips may also be having an impact on car ownership.

Data from the 2021 Census suggested slightly higher levels of car ownership in London relative to the LTDS, with 42 per cent of households in inner London having access to a car or van, and 69 per cent in outer London.

## Full summary data

This report has summarised key indicators of travel for London residents and how they have changed since the pandemic. A full summary of the data on which this is based is available on the [London Travel Demand Survey page](#) on TfL's website.