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Travel in London 2025

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

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2024/25 update

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Summary

About the survey

This report looks at aspects of the travel behaviour of London residents as tracked through the London Travel Demand Survey (LTDS), a survey of London households conducted annually every financial year since 2005/06.

Each year, around 8,000 households are surveyed 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 over the age of five. The sample is spread evenly across the year and is designed to be representative of London residents at the London-wide level when expanded. 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 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 (note the series breaks in the figures) to improve clarity and to aid interpretation.

This report summarises key indicators of travel for London residents and how they have changed over time. A **workbook** with more data from the LTDS and a **methodology note** about sampling and design are available on the LTDS page on TfL's website.

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

Summary of key findings

The 2024/25 LTDS provides the third year of data on London residents' post-pandemic travel behaviour, based on a sample of 8,210 households, and is directly comparable with the most recent pre-pandemic data (2019/20) and with the longer-term historical series. The results of the 2024/25 survey give increased confidence in some of the emerging post-pandemic travel behaviour trends seen in 2022/23 and 2023/24.

Trip rates (trips per person per day)

- The average trip rate (trips per person per day) increased by one per cent between 2023/24 and 2024/25 to exactly two trips per person per day, while remaining nine per cent below the pre-pandemic (2019/20) position and three per cent below 2022/23. While there was a slight increase in the trip rate in the latest year, driven by increases in the number of walking and rail trips per person per day, the latest data does not significantly alter the long-term trend of decreasing per-person travel demand.
- The trend at the national (England) level based on the National Travel Survey (NTS) is similar, indicating a long-term decrease in travel demand and trip rates which had not returned to pre-pandemic levels in 2024, despite an increase in trip rates in the latest year. For England residents, the trip rate in 2024 based on the NTS remained three per cent below the pre-pandemic (2019) level.

- In 2024/25, inner London residents made five per cent more trips per person per day than outer London residents (compared to three per cent more in 2019/20).

Travel by mode

- Between 2023/24 and 2024/25, the rail trip-based mode share by London residents increased, while the bus mode share decreased slightly, resulting in a one-percentage-point increase in the combined public transport mode share to 28 per cent in 2024/25, although this remained slightly below the 2019/20 position of 29 per cent.
- Over the same period, mode shares decreased for car driver and car passenger trips by London residents, leading to a one-percentage-point decrease in the combined mode share for private modes to 32 per cent in 2024/25, one percentage point below 2019/20.
- The active travel mode share for London residents remained at 40 per cent in 2024/25, matching 2023/24 and three percentage points higher than in 2019/20.
- The net outcome in London residents' active, efficient and sustainable mode share in 2024/25 was an increase of one percentage point relative to 2023/24, to 68 per cent.
- These mode share changes should be viewed in the context of reduced overall travel demand relative to 2019/20.

Travel by journey purpose

- There was a decrease of 15 per cent in the proportion of London residents' trips made for the purpose of commuting between 2019/20 and 2022/23. However, since then, the proportion gradually increased and returned to the 2019/20 share of 17 per cent in 2024/25. Note however that the absolute number of trips remained below the 2019/20 level.
- The share of residents' trips made for shopping and personal business continued to decrease in 2024/25, and at 21 per cent is the lowest on record. This reflects a continuing long-term trend of falling shopping and personal business trip rates.
- The share of trips made for leisure increased to 32 per cent in 2024/25. As well as accounting for the largest fraction of London residents' trips, the leisure journey purpose share in 2024/25 was higher than in any other year except 2022/23. This largely reflects reduced trip rates for other purposes, rather than a significant increase in the leisure trip rate.
- These journey purpose share changes should be viewed in the context of reduced overall travel demand relative to 2019/20.

Remote and hybrid working

- The proportion of London resident workers who are able to work from home decreased slightly between 2023/24 and 2024/25 from 47 per cent to 45 per cent.
- Since the pandemic, the proportion of London resident workers able to work from home and actively encouraged to do so decreased year-on-year from 36 per cent in 2022/23 to 35 per cent in 2023/24 and to 33 per cent in 2024/25. This trend may suggest increasing pressure from employers to attend workplaces.
- The proportion of London resident workers working from home on three or more days per week decreased from approximately 27 per cent in 2022/23 to 22 per cent in 2024/25. While those who are able to work from home continued to do so, there is

evidence to suggest that as the pandemic becomes more distant, this happens less frequently.

- In 2024/25, 55 per cent of London resident workers were not able to work from home and 58 per cent either did not work from home at all or did so less than once in a typical week.

Distances and durations travelled

- London residents travelled 11.9 kilometres per person per day in 2024/25, a six per cent increase on 2023/24, but nine per cent less than in 2019/20. The average time travelled per person per day was 54.8 minutes, also a slight increase on 2023/24 but nine per cent below the 2019/20 position.
- At the national level (based on the NTS), England residents travelled approximately 26.8 kilometres per person per day in 2024, six per cent less than in 2019.

Household car ownership

- The long-term trend of decreasing car ownership in London households continued in 2024/25, with the proportion of households which do not own a car increasing by two percentage points to 48 per cent. The proportions of households with no car were 64 per cent and 36 per cent for inner and outer London respectively.
- The proportion of households which owned more than one car decreased in outer London between 2023/24 and 2024/25.

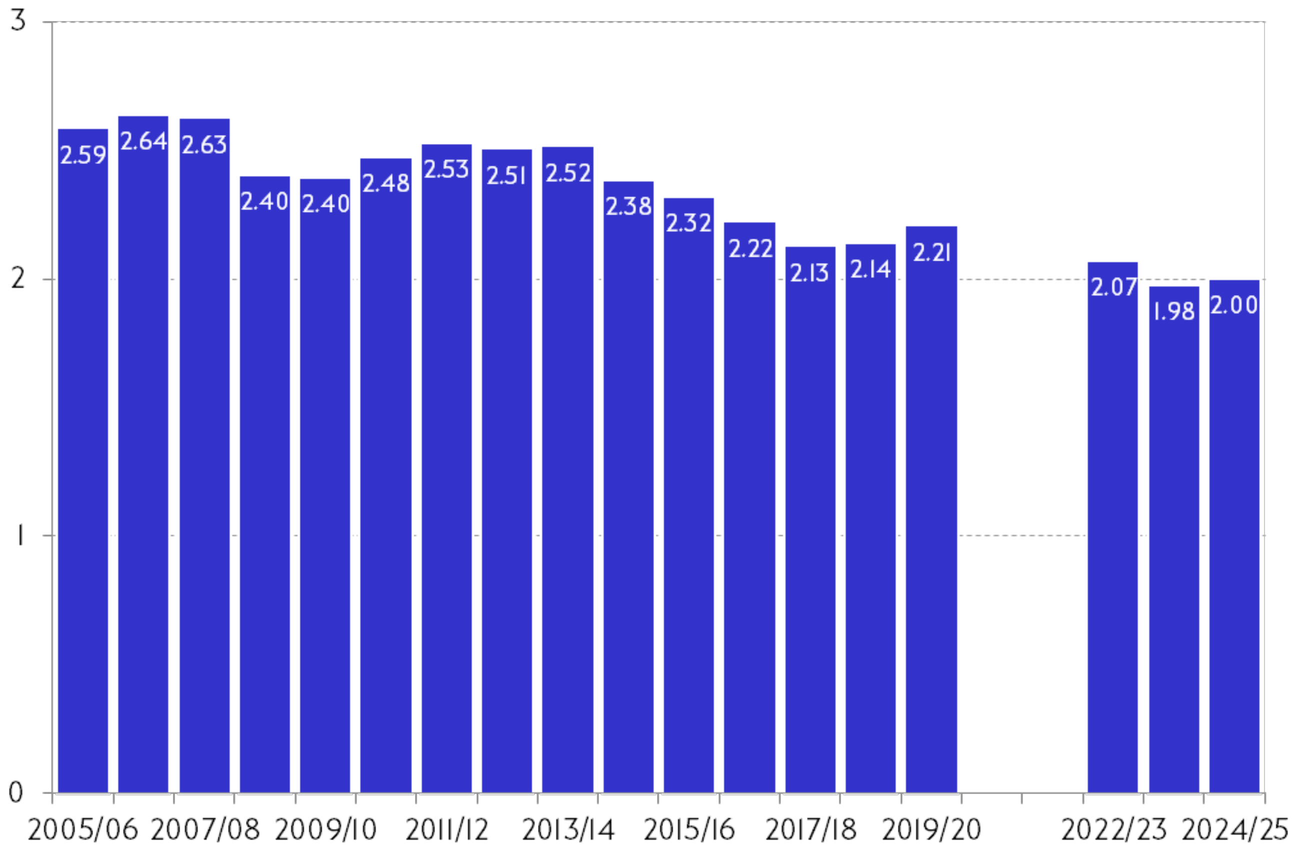
Trip rates

Overall trip rate for 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 decreasing trip rates over its lifetime. This trend accelerated between 2013/14 and 2017/18. However, in the two years before the pandemic, the average trip rate increased slightly from 2.13 in 2017/18 to 2.21 trips per person per day in 2019/20, thought to be due to improving economic conditions.

After the pandemic, the average trip rate continued to decrease, decreasing from 2.07 trips per person per day in 2022/23 to 1.98 in 2023/24. However, the latest data shows that between 2023/24 and 2024/25, the average trip rate increased by one per cent to 2.00 trips per person per day, while remaining around nine per cent below the pre-pandemic position (2019/20) and three per cent below 2022/23 (figure 1).

Figure 1 Trips per person per day by London residents, LTDS, from 2005/06 to 2024/25.



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 slight increase in the average trip rate between 2023/24 and 2024/25 is linked to increases in the number of walking (all the way) and rail trips per person per day (up by two per cent and nine per cent respectively).

Despite the slight increase in the average trip rate over the most recent year, which suggests some recovery in post-pandemic travel demand, the long-term trend indicates decreasing demand for travel. The current average trip rate for 2024/25 is 24 per cent below the high point of 2.64 trips per person per day in 2006/07 (as recorded by the LTDS) and the average trip rate for the three years after the pandemic (2022/23 to 2024/25) is seven per cent below the trip rate for the three years before the pandemic (2017/18 to 2019/20). This pattern is also seen at the national (England) level as recorded by Department for Transport's NTS and in some other cities around the world.

As well as the average number of trips per person per day decreasing in recent years, the proportion of London residents reporting that they did not travel at all on the LTDS travel diary day also increased. Comparing the three years before the pandemic to the three years after, the proportion of London residents who reported that they did not leave home at all on the travel day (excluding those who were absent on that day) increased from 22 per cent to 25 per cent. This is thought to reflect increased working from home as well as a decreased need to travel for other purposes, notably shopping and personal business.

The following sections explore how recent changes in trip rates differ between sociodemographic groups and trip types.

Trip rates by sociodemographic group

Table 1 shows trip rates by different sociodemographic groups in 2019/20, 2022/23, 2023/24, and 2024/25, as well as the change in the three-year average trip rate for each group from three years before the pandemic (2017/18 to 2019/20) to the three years after the pandemic (2022/23 to 2024/25).

Looking first at **gender**, the data shows that trip rates in recent years were very similar for male and female London residents. While over its lifetime the LTDS recorded an average difference of 2.3 per cent between the trip rates for men and women (with women making more trips per person per day on average), the difference in 2022/23 was just 0.2 per cent. In 2023/24, the trip rate for women was lower than the trip rate for men for the first time since 2009/10. Between 2023/24 and 2024/25, however, the trip rate for women increased by three per cent, while the trip rate for men did not change significantly, bringing the difference back up to 1.8 per cent in 2024/25. From the pre-pandemic three-year average to the post-pandemic three-year average, trip rates decreased by six per cent for men and by seven per cent for women, reflecting the higher pre-pandemic position for women.

Trip rates by all **age** groups decreased from the three-year period before the pandemic to the three-year period after the pandemic, with the largest decreases of between seven and eight per cent observed in the working age population. Between 2023/24 and 2024/25, trip rates increased slightly for all age groups except those aged 65 and over, in line with the small overall increase in travel demand. Despite an increase of two per cent over the latest year, the trip rate for those aged 17 to 24 remained the lowest, at 1.64 trips per person per day in 2024/25. The trip rate remained highest for those aged 25 to 44, at 2.22 trips per person per day, which was also an increase of two per cent over the last year.

By **ethnicity**, the data shows that in 2024/25 White residents continued to make the most trips per person day and Black residents the fewest. Between 2023/24 and 2024/25 trip rates increased slightly for White, Asian, and Black residents. Between the three-year period before the pandemic and the three-year period after, trip rates decreased across all ethnicities. The largest decrease of nine per cent was in the trip rate for Black residents.

Trip rates decreased for all **working status** groups from the three-year period before the pandemic to the three-year period after, with non-working residents and students showing the largest decreases of 11 per cent and seven per cent respectively, despite both increasing slightly between 2023/24 and 2024/25. The trip rate for full-time workers decreased by seven per cent from the three-year period before the pandemic to the three-year period after, while there was a smaller decrease of five per cent for part-time workers. The trip rate for students remained the lowest in 2024/25, at 1.65 trips per person per day, and the trip rate for part-time workers remained the highest at 2.40.

Looking at **household income**, London residents in higher-income households made more trips on an average day than people in lower-income households. In 2024/25, people living in households with a household income of less than £25,000 made 1.84 trips per person per day, while people living in households with a household income of £100,000 or more made 2.20 trips per person per day. Between 2023/24 and 2024/25, trip rates increased slightly across all household income groups except those with an income of £100,000 or more, which decreased by one per cent. Between the three-year period before the pandemic and the three-year period after the pandemic trip rates decreased across all household income groups, with households with incomes between £25,000 and £50,000 showing the largest decrease (10 per cent).

Table 1 Trips per person per day by sociodemographic group, LTDS, 2019/20 and from 2022/23 to 2024/25.

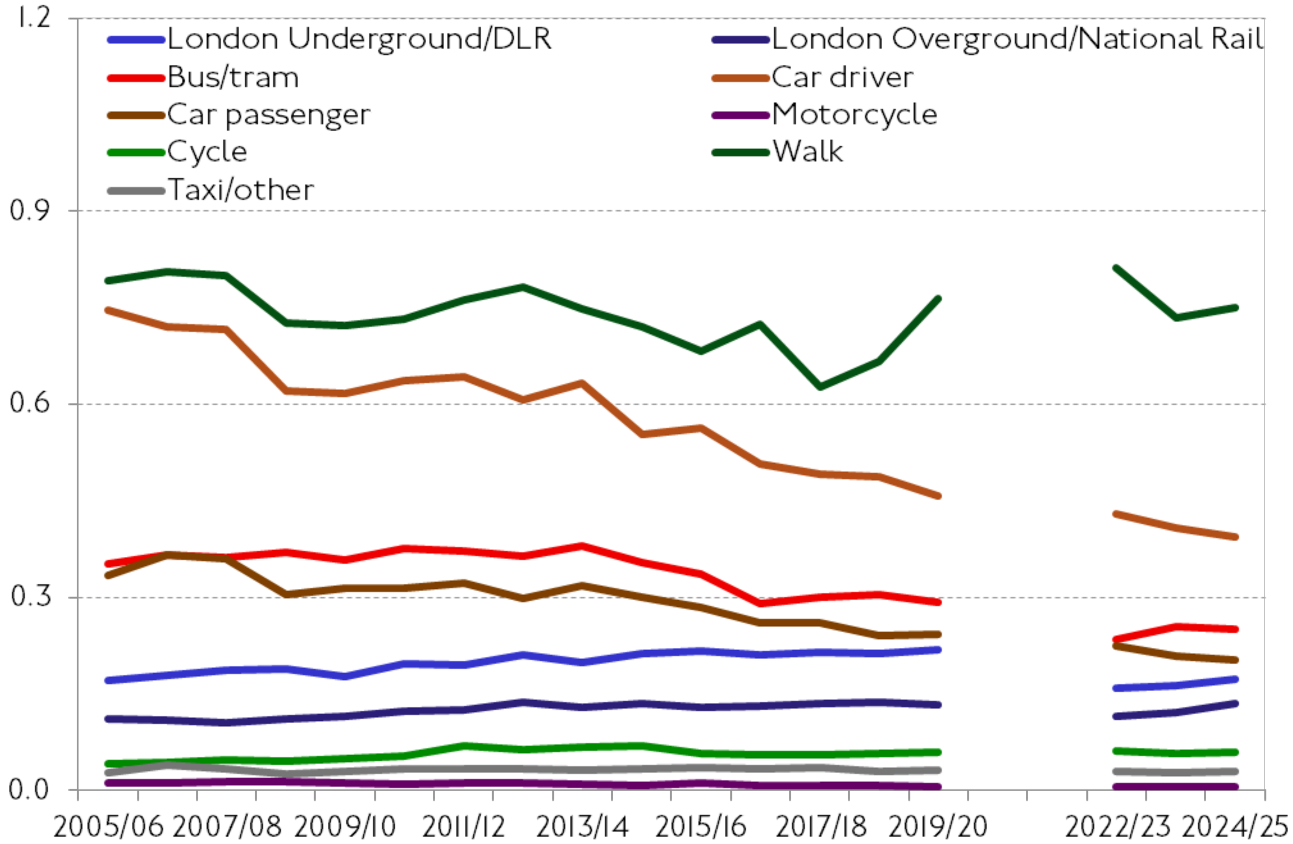
Group	2019/20	2022/23	2023/24	2024/25	Change from the average between 2017/18 and 2019/20 to the average between 2022/23 and 2024/25 (percentage)
Men	2.21	2.07	1.99	1.98	-6
Women	2.21	2.07	1.97	2.02	-7
Five to 16	1.89	1.91	1.78	1.80	-4
17 to 24	1.81	1.66	1.60	1.64	-7
25 to 44	2.45	2.25	2.18	2.22	-7
45 to 59	2.38	2.29	2.09	2.10	-8
60 to 64	2.41	2.11	1.97	2.03	-7
65 and over	1.92	1.75	1.80	1.78	-6
White	2.35	2.27	2.14	2.17	-5
Asian	2.01	1.83	1.79	1.84	-6
Black	1.94	1.80	1.68	1.70	-9
Other/refused	2.12	1.87	1.91	1.83	-8
Full-time work	2.40	2.24	2.15	2.17	-7
Part-time work	2.72	2.59	2.42	2.40	-5
Student	1.87	1.72	1.63	1.65	-7
Not working	2.06	1.83	1.66	1.81	-11
Retired	1.89	1.65	1.74	1.71	-7
Under £25,000	2.06	1.88	1.82	1.84	-6
£25,000 to £50,000	2.17	1.97	1.88	1.90	-10
£50,000 to £75,000	2.21	2.11	1.99	2.04	-8
£75,000 to £100,000	2.35	2.18	2.06	2.12	-9
Over £100,000	2.45	2.35	2.22	2.20	-7

Source: TfL Strategic Analysis, Customer & Strategy.
Note: Due to various issues with the ethnicity data, it is not possible to separately report each component of the 'other/refused' category. These issues also affected the number of people who 'refused' to respond to this question. Although not ideal, presenting these categories combined provides the best like-for-like comparison between the two assessed time periods.

Trip rates by mode of travel

Figure 2 shows the long-term trends in trip rates by mode of travel over the history of the LTDS.

Figure 2 Trips per person per day by London residents, by mode of travel, LTDS, from 2005/06 to 2024/25.



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 for rail modes increased gradually between 2005/06 and 2019/20 and, despite dropping after the pandemic period, resumed the trend of gradually increasing since 2022/23. Trip rates by London Overground/National Rail (including the Elizabeth line) increased by six per cent between 2022/23 and 2023/24 and by 12 per cent in the latest year. Trip rates by London Underground/DLR increased more slowly, by two per cent between 2022/23 and 2023/24 and by six per cent in the latest year. While the trip rate for London Overground/National Rail in 2024/25 surpassed its 2019/20 level by two per cent, the trip rate for London Underground/DLR remained 22 per cent below its 2019/20 position.

Bus/tram trip rates have been slowly declining since 2013/14 and also decreased after the pandemic period. While the bus/tram trip rate increased by eight per cent between 2022/23 and 2023/24, it decreased by one per cent over the latest year and remained 14 per cent below its 2019/20 position.

The long-term trend of decreasing trip rates for both car driver and car passenger trips continued into 2024/25, with the car driver trip rate decreasing by three per cent and the car passenger trip rate decreasing by two per cent over the latest year. The car driver trip rate for 2024/25 was 0.39 trips per person per day, 47 per cent below its position in

2005/06. The car passenger trip rate was 0.20 trips per person per day in 2024/25, 39 per cent below 2005/06.

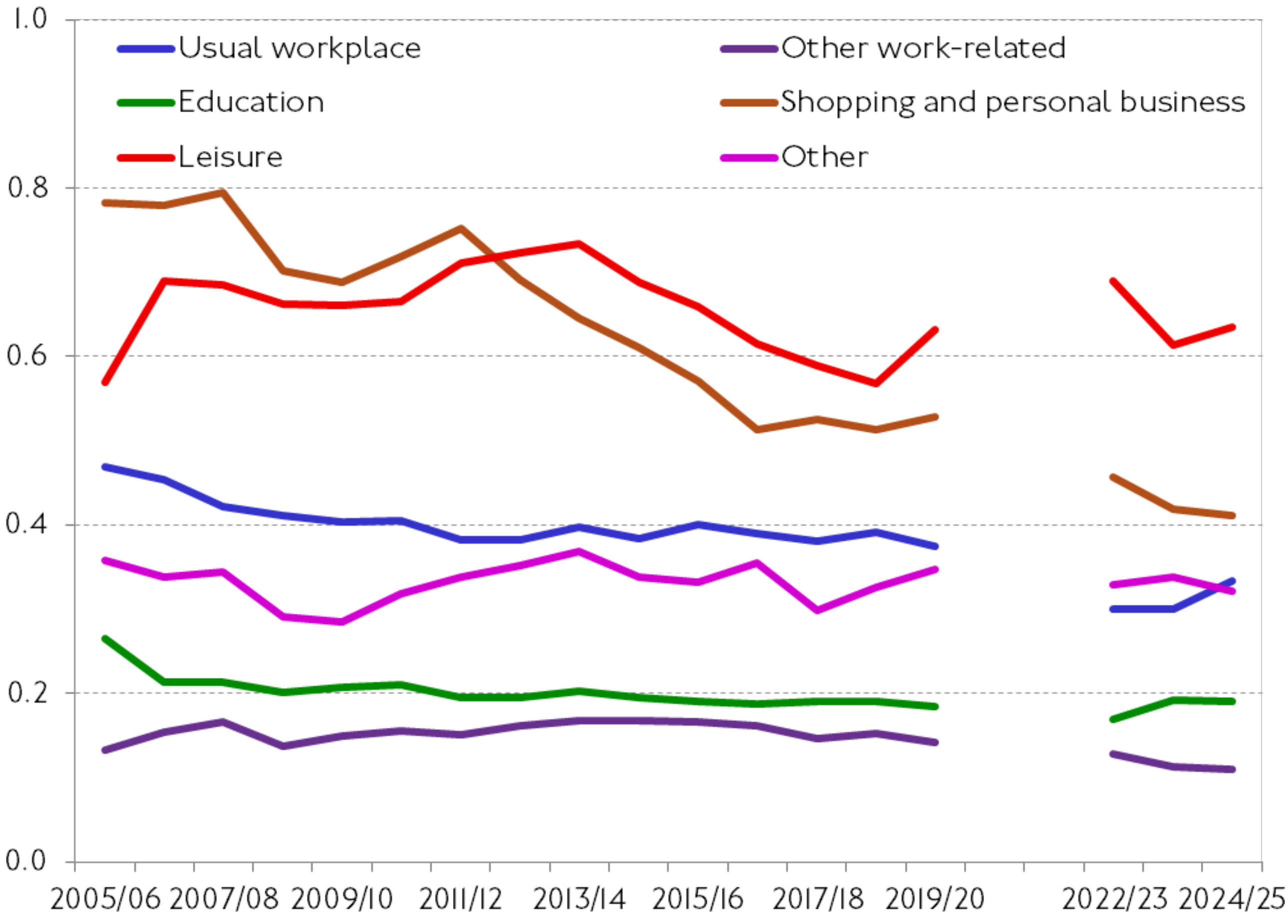
In the period leading up to the pandemic, cycling trip rates increased relatively slowly, reflecting cycling participation levels among the general population, and remained at similar levels of around 0.06 trips per person per day after the pandemic.

Walking (all the way) trip rates fluctuated over the survey period and showed a marked increase just before and during the pandemic. While between 2022/23 and 2023/24 the walking (all the way) trip rate decreased from 0.81 to 0.73 trips per person per day, in the latest year it increased by two per cent to 0.75 trips per person per day, slightly below the 2019/20 position of 0.76 trips per person per day but above every other pre-pandemic year in the past decade.

Trip rates by journey purpose

Figure 3 shows the long-term trends in trip rates by journey purpose.

Figure 3 Trips per person per day by London residents, by journey purpose, LTDS, from 2005/06 to 2024/25.



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.

Before the pandemic there was a decrease in shopping and personal business trip rates (from 2012/13) and leisure trip rates (from 2014/15), the latter thought primarily to reflect cost-of-living pressures. While leisure trip rates recovered, even increasing over the pandemic period when trip rates fell for all other purposes, shopping and personal business trip rates continued to decrease after the pandemic, by eight per cent between 2022/23 and 2023/24 and by two per cent between 2023/24 and 2024/25.

Over the latest year, the usual workplace (commuting) trip rate increased by 11 per cent. The leisure trip rate also increased by three per cent, while trip rates fell slightly for all other journey purposes, suggesting that post-pandemic recovery in travel to work and an increase in travel for leisure drove the slight overall increase in trip rates between 2023/24 and 2024/25.

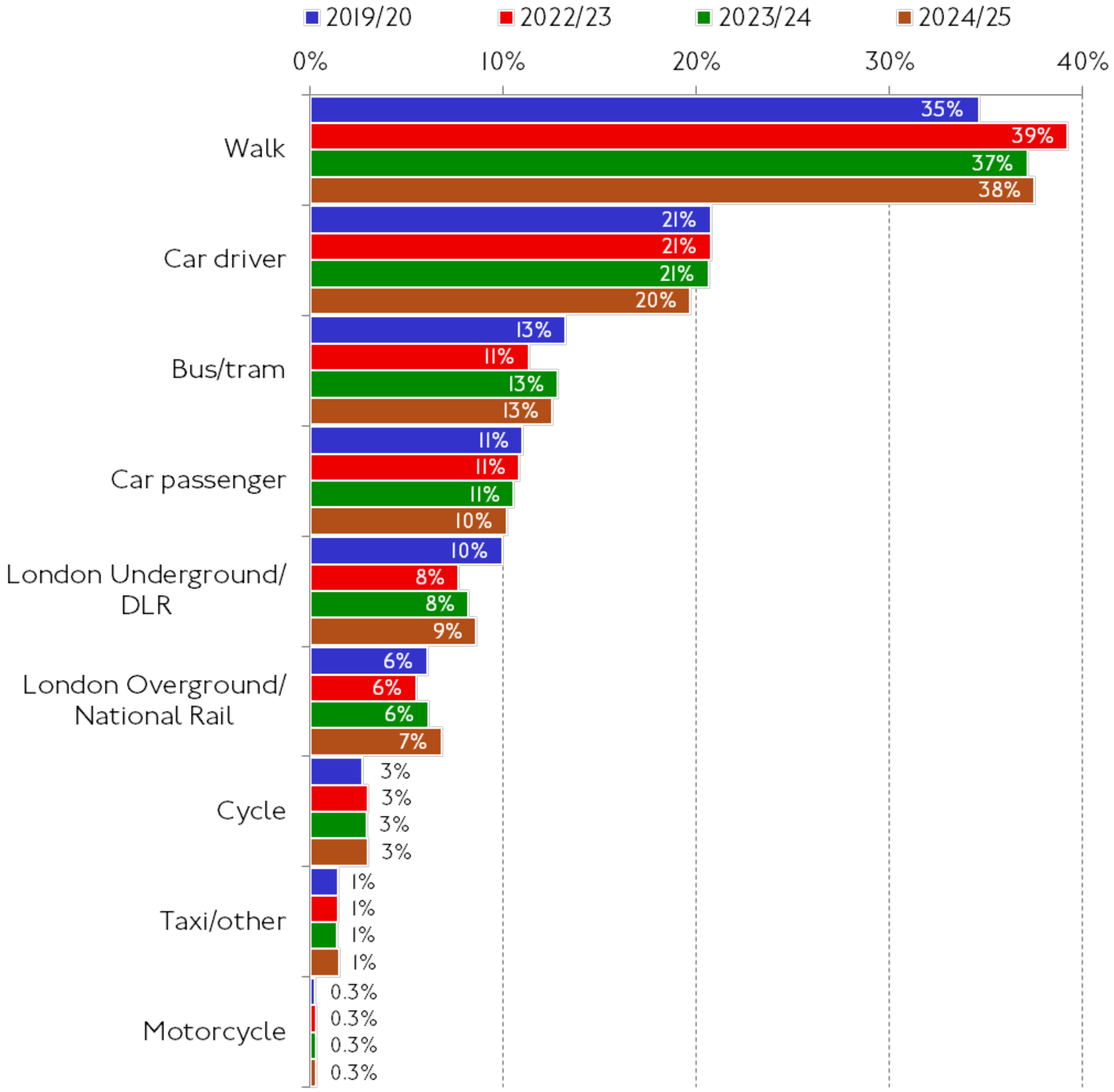
The usual workplace (commuting) trip rate for 2024/25 was 0.33 trips per person per day, some 11 per cent below its position in 2019/20. While travel for work remained well below pre-pandemic levels, this represents a significant recovery from 2022/23, when the commuting trip rate was 20 per cent below 2019/20.

Trip-based mode and journey purpose shares

Mode shares

Figure 4 shows the trip-based mode shares of London residents in recent years. London residents' mode shares are 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. Note, however, that 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 LTDS.

Figure 4 Trip-based mode shares by London residents, LTDS, 2019/20 and from 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

Before the pandemic, most London residents' trips were walking trips or car driver trips (35 and 21 per cent, respectively). The combined public transport mode share in 2019/20 was 29 per cent, the car passenger mode share was 11 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 the combined public transport mode share, no change in the share of trips made by private modes, and an increase in the share of 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 at that time and the recovery from the pandemic.

In 2023/24 there was an increase in the rail and bus mode shares, leading to a three-percentage-point increase in the combined public transport mode share from 24 per cent to 27 per cent (two percentage points below the pre-pandemic position in 2019/20). The private mode share remained similar to 2022/23, decreasing by less than one percentage point, and the active travel mode share was down by two percentage points from 2022/23 at 40 per cent, but still three percentage points higher than the pre-pandemic value (2019/20).

Between 2023/24 and 2024/25, the rail mode share increased, while the bus mode share decreased slightly, resulting in a one-percentage-point increase in the combined public transport mode share to 28 per cent, although this remained slightly below the 2019/20 position of 29 per cent. Mode shares decreased for car driver and car passenger trips, leading to a one-percentage-point decrease in the mode share for private modes to 32 per cent, one percentage point below 2019/20. The active travel mode share remained at 40 per cent, matching 2023/24 and three percentage points higher than in 2019/20.

Active, efficient and sustainable mode share

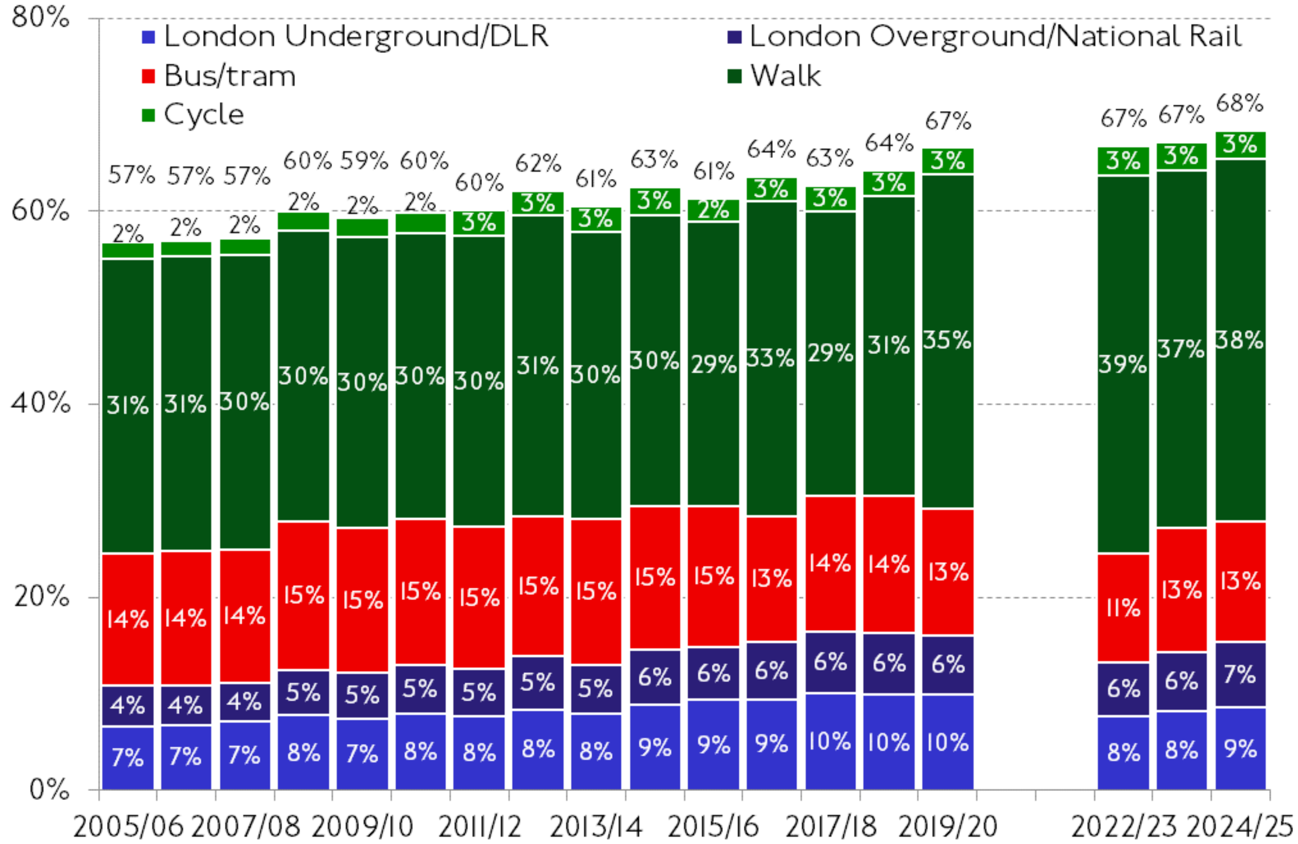
The proportion of London residents' trips made by active, efficient and sustainable modes (public transport, walking or cycling) has increased gradually over time (figure 5). Between 2005/06 and 2019/20 it increased by 10 percentage points from 57 per cent to 67 per cent. This was mostly driven by consistent growth in public transport use (primarily rail) over this period, in addition to an increase in cycling (albeit from a low baseline of cycling mode share). Bus and walking mode shares were relatively stable over this period.

Although public transport mode shares for London residents decreased during the pandemic, the active travel mode shares increased, mitigating the impact of the decline in public transport mode shares on the overall active, efficient and sustainable mode share. In 2019/20, the residents' active, efficient and sustainable mode share was 67 per cent and in 2022/23 it remained at 67 per cent (with the decreased public transport mode shares balanced by the increased active travel mode shares).

Between 2022/23 and 2023/24 the active, efficient and sustainable mode share increased slightly (by less than one percentage point), driven by an increase in the public transport mode shares (particularly the bus mode share) and offset by a decrease in the walking mode share. These changes should be viewed in the context of a decrease of five per cent in the average trip rate over this period.

In 2024/25, the active, efficient and sustainable mode share increased by one percentage point to 68 per cent, driven by an increase in the public transport mode share (the mode share for rail increased while the bus mode share decreased slightly) and in the active travel mode share (predominantly walking). The changes for the latest year should also be viewed in the context of a slight increase of one per cent in the average trip rate over the same period, which means that in 2024/25 London residents travelled slightly more overall relative to 2023/24, as well as making a greater proportion of their trips by active, efficient and sustainable modes.

Figure 5 Active, efficient and sustainable trip-based mode share by London residents, LTDS, from 2005/06 to 2024/25.



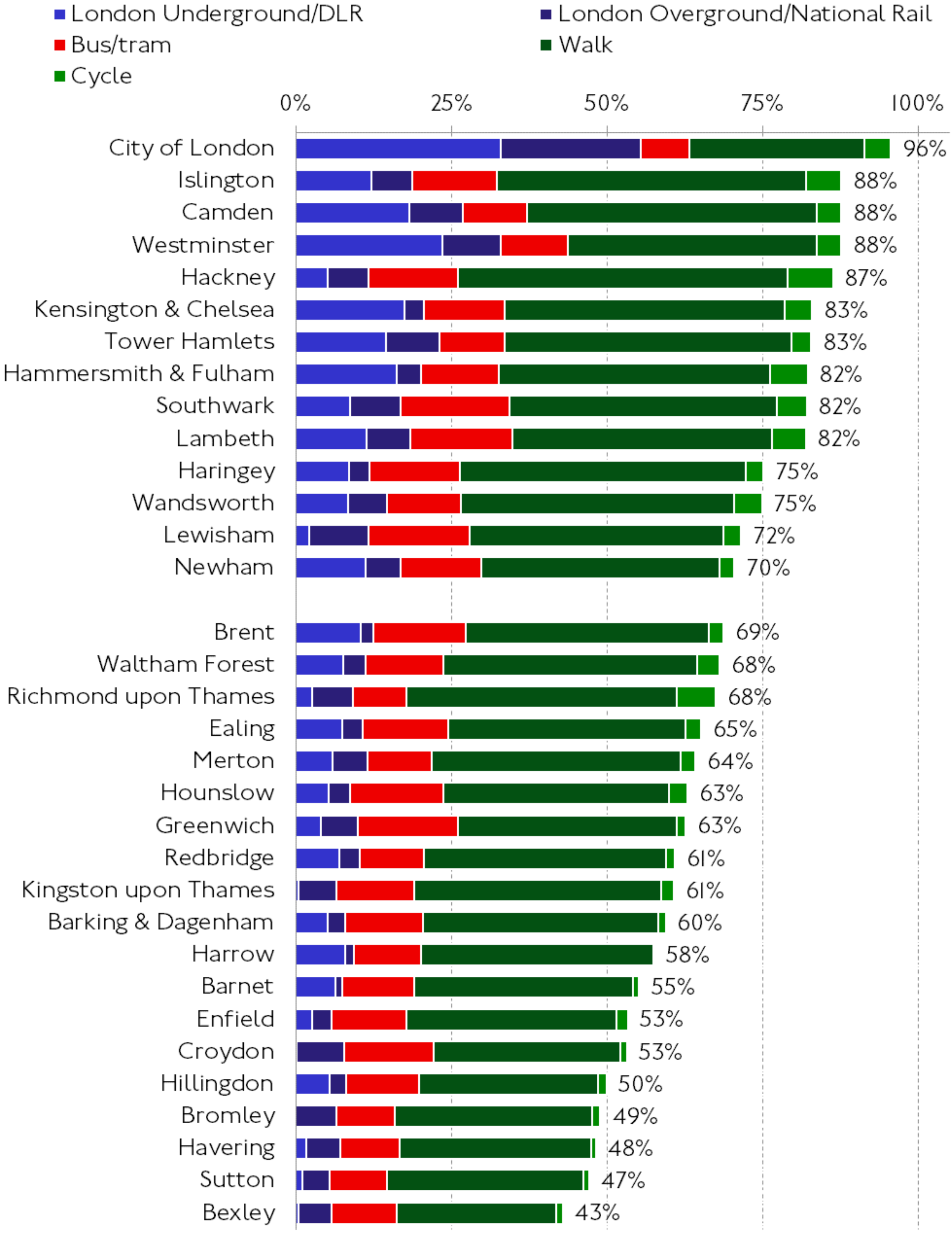
Source: TfL Strategic Analysis, Customer & Strategy.
Note: Comparable data is missing for 2020/21 and 2021/22 due to the impacts of the coronavirus pandemic.

Figure 6 shows the active, efficient and sustainable mode share at the borough level, with the boroughs grouped into inner London boroughs and outer London boroughs. The estimates at the borough level are calculated from the proportion of trips (by mode) made by London residents starting in each borough, averaged over the three-year period from 2022/23 to 2024/25.

For this three-year period, the active, efficient and sustainable mode share ranged from 70 per cent to 96 per cent for inner London boroughs, with an average of 82 per cent. For outer London boroughs, the range was from 43 per cent to 69 per cent, with an average of 58 per cent.

Although each borough has a unique set of circumstances which determine these mode shares and affects the ability to change them, the scope for change is evident.

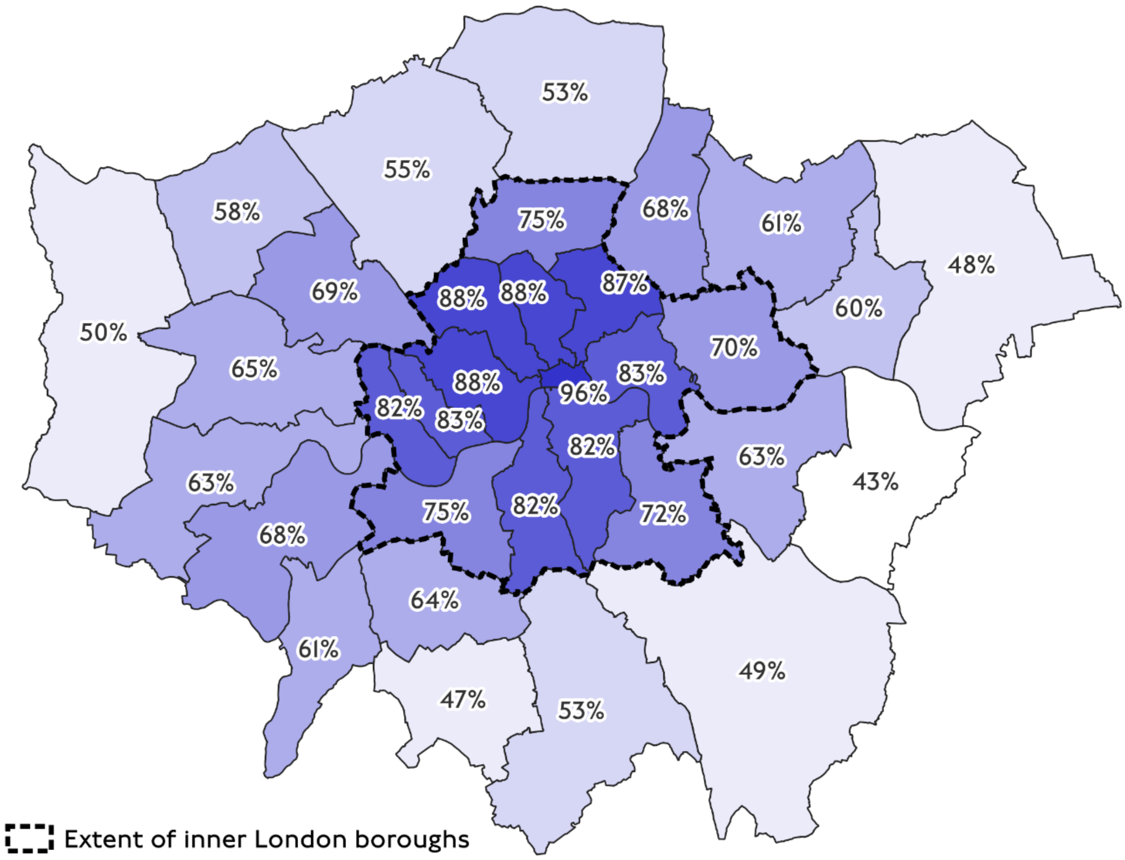
Figure 6 Active, efficient and sustainable trip-based mode share by London residents by borough of trip origin (inner London boroughs followed by outer London boroughs), LTDS, three-year average between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

Figure 7 shows the active, efficient and sustainable trip-based mode share by borough of trip origin (as seen in figure 6) on a map, where a darker blue colour indicates a higher active, efficient and sustainable mode share.

Figure 7 Map of active, efficient and sustainable trip-based mode share by London residents by borough of trip origin, LTDS, three-year average between 2022/23 and 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

Within inner London, the borough-level active, efficient and sustainable mode share was generally highest for the more central boroughs, and for those north of the River Thames. In outer London, active, efficient and sustainable mode shares were highest in the boroughs closest to inner London and in west and south-west London.

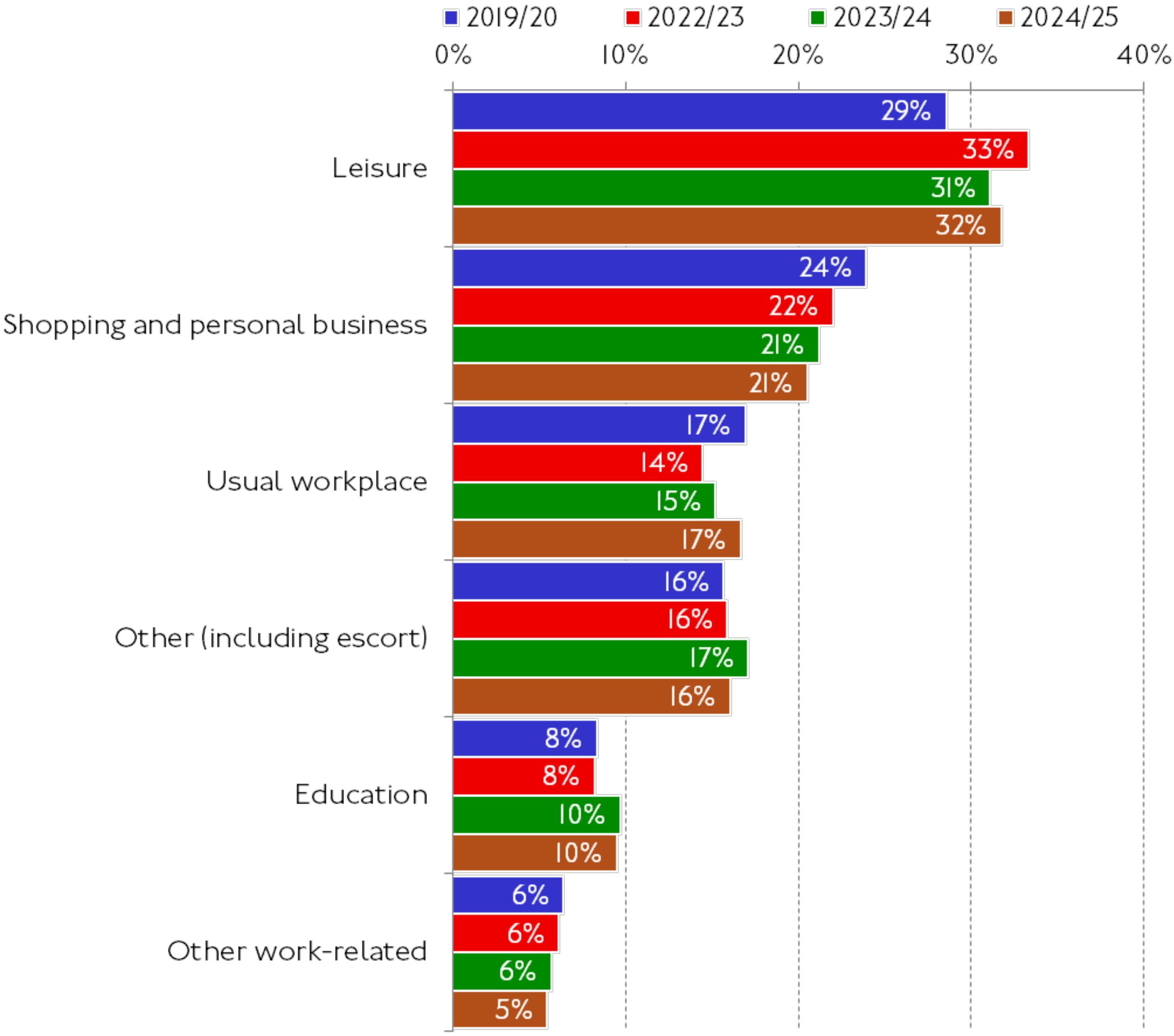
Journey purpose shares

Figure 8 shows the proportion of London residents' trips by journey purpose in recent years.

The data shows that while there was a decrease of 15 per cent in the proportion of London residents' trips made for usual workplace (commuting) between 2019/20 and 2022/23, since then the proportion increased, returning to the 2019/20 share of 17 per cent in 2024/25.

The proportion of London residents' trips made for other work-related purposes (for example travelling to a meeting) was gradually decreasing over this period and in 2024/25 accounted for the lowest proportion of residents' trips recorded since 2005/06.

Figure 8 Proportion of trips by London residents by journey purpose, LTDS, 2019/20 and from 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

The share of London residents' trips made for shopping and personal business continued to decrease in 2024/25, and at 21 per cent was the lowest on record. This reflects the trend of decreasing shopping and personal business trip rates seen in figure 3 above.

In contrast, the share of trips made for leisure increased to 32 per cent in 2024/25. As well as accounting for the largest fraction of residents' trips, the leisure journey purpose share was higher than any other year except 2022/23. This largely reflects lower trip rates for other purposes rather than a significant increase in the leisure trip rate.

These changes in journey purpose shares should be considered in the context of changes in overall trip rates, which decreased between 2019/20 and 2023/24 before increasing slightly in 2024/25 (albeit remaining nine per cent below 2019/20).

Comparisons with the National Travel Survey

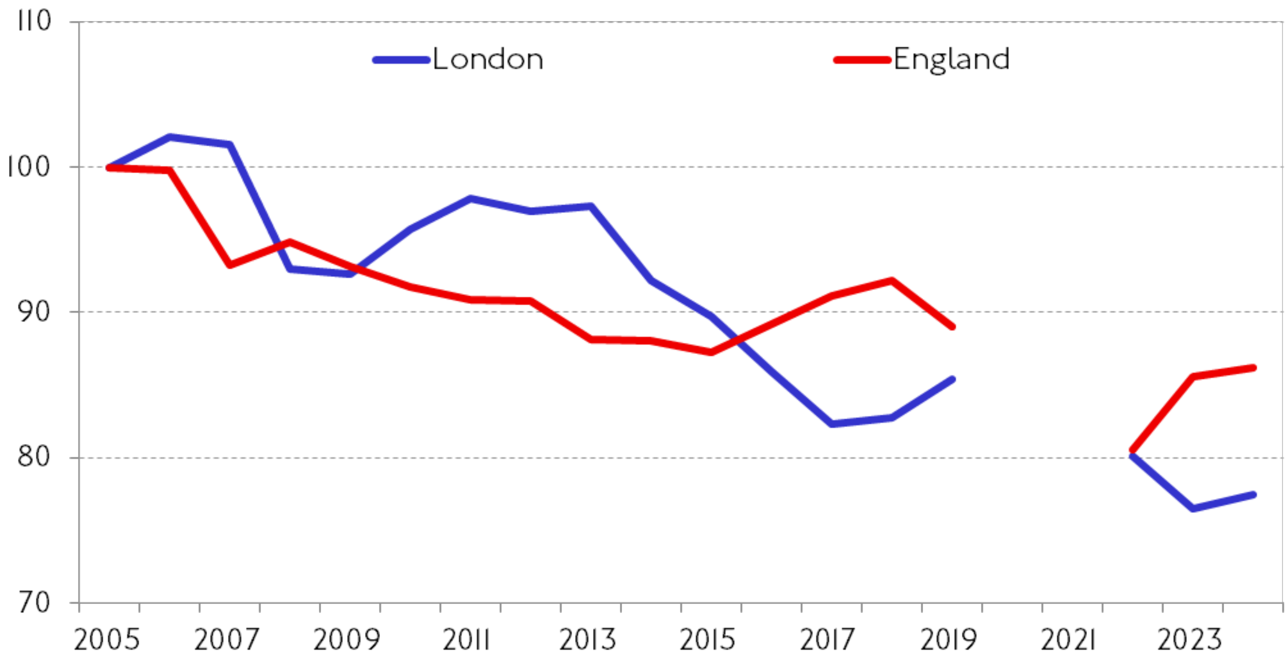
It is useful to compare key trends in travel behaviour in London drawn from the LTDS with wider trends in England from the NTS. The NTS is a household survey which monitors the long-term trends in personal travel by residents of England.

The 2023 NTS was the first survey 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 6,314 households completing travel diaries across England, compared to a sample of 3,646 households in 2022. In 2024, the same number of households were invited to participate in the NTS as were invited in 2023, resulting in a sample size of 7,530 households completing travel diaries across the whole of England. For comparison, the LTDS for 2024/25 resulted in a sample of 8,210 households completing travel diaries across London. Although the absolute sample sizes for the NTS and the LTDS were similar for 2024 (or 2024/25), the sampling rate of the LTDS was significantly higher due to the difference between the London and England populations, 9.1 million in London and 58.6 million in England based on Office for National Statistics (ONS) mid-year estimates for 2024. Note that the NTS runs in calendar years while the LTDS runs in financial years and that the NTS data reported below for England includes responses from London households.

Overall trip rates

Figure 9 shows the relative (indexed) change in the average trip rate for London residents from the LTDS and for England residents from the NTS since 2005 (or 2005/06).

Figure 9 Change (index: 2005 or 2005/06 = 100) in trips per person per day by London and England residents, LTDS from 2005/06 to 2024/25 and NTS from 2005 to 2024.



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

The data shows that trip rates for both London and England residents decreased gradually between 2005 and 2019. For England residents (based on the NTS) the decrease was 11 per cent and for London residents (based on the LTDS) it was 15 per cent.

After the pandemic, trip rates for London and England residents have both remained below pre-pandemic levels, with the LTDS showing that the trip rate for London residents in 2024/25 was nine per cent below the trip rate for 2019/20 and the NTS showing that the trip rate for England residents was three per cent below the 2019 position. This suggests that the decrease in trip rates seen both in London and England was proportionally greater in London than in England as a whole.

Looking at the NTS sample of London residents reinforces the conclusion that trip rates in London decreased proportionally more in London than in England. Between 2005 and 2019, the NTS shows that the trip rate for London residents decreased by 12 per cent and that the trip rate for London residents in 2024 was 10 per cent below the pre-pandemic (2018 to 2019) position. These results more closely reflect the trend seen in the LTDS than the national trend from the NTS. Note however that the NTS sample of London residents is much smaller than the LTDS sample (approximately 15 per cent of the LTDS sample of individuals in the latest year).

The LTDS and NTS therefore indicate broadly similar trends: a long-term decrease in trip rates since 2005, a significant drop in trip rates over the pandemic period and post-pandemic trip rates which had not returned to pre-pandemic levels in 2024 (or 2024/25). Both surveys also indicate that the decrease in trips rates in London in recent years was proportionally greater than the decrease at the national level.

Trip rates by mode of travel

Table 2 shows the change in trip rates by mode of travel between 2019 (or 2019/20) and 2024 (or 2024/25) for London and England residents, from the LTDS and the NTS respectively.

In both London and England, public transport trip rates remained below pre-pandemic levels in 2024 (or 2024/25), with the exception of the London Overground/National Rail trip rate in London, which was two per cent higher than in 2019/20.

For both London and England, the bus trip rate was slower to recover from the impacts of the pandemic than the trip rates for surface rail modes. In London, the London Overground/National Rail trip rate was down by 15 per cent relative to 2019/20 in 2022/23 but exceeded the 2019/20 level by two per cent in 2024/25. Over the same period, the bus trip rate in London recovered from 20 per cent below 2019/20 to 14 per cent below 2019/20. In England, the surface rail trip rate recovered from 28 per cent below 2019 in 2022 to three per cent below 2019 in 2024, while the bus trip rate was 25 per cent below 2019 in 2022 and remained 17 per cent below 2019 in 2024.

Car driver and car passenger trip rates decreased between 2019 and 2024 for both London and England residents, while the scale of change for these modes was noticeably greater for London than for England residents.

The trends in active travel trip rates for London and England differed somewhat over the period between 2019 and 2024. In London, the cycling trip rate increased by one per cent over this period, while the walking trip rate remained two per cent below the pre-pandemic position. In contrast, the NTS shows that the cycling trip rate decreased by six per cent for residents of England over the same period, and that the walking trip rate increased by seven per cent.

Table 2 Change from 2019/20 to 2024/25 (or 2019 to 2024) in trips per person per day by London and England residents, by mode of travel, LTDS from 2019/20 to 2024/25 and NTS from 2019 to 2024.

Mode – London	Change from 2019/20 to 2024/25 – London (percentage)	Mode – England	Change from 2019 to 2024 – England (percentage)
London Overground/ National Rail	2	Surface rail	-3
London Underground/DLR	-22	[Not applicable]	[Not applicable]
Bus/tram	-14	Bus	-17
Taxi/other	-6	Taxi or minicab	-19
Car driver	-14	Car driver	-6
Car passenger	-16	Car passenger	-5
Motorcycle	1	Motorcycle	-8
Cycle	1	Cycle	-6
Walk	-2	Walk	7

Source: TfL Strategic Analysis, Customer & Strategy and Department for Transport.

Trip rates by journey purpose

Table 3 shows a comparison of the change in trip rates by journey purpose between 2019 and 2024 (or 2019/20 and 2024/25) for London and England residents, based on the LTDS and the NTS, respectively.

For both London and England residents, usual workplace (commuting) trip rates remained noticeably below pre-pandemic levels in 2024 (or 2024/25). While for England the commuting trip rate for the latest year remained 21 per cent below the 2019 position, for London the 2024/25 position was 11 per cent below 2019/20, suggesting a faster return to the office in London relative to the rest of the country. Trip rates for other work-related trips also decreased over this period for both London and England residents, showing that both in London and England people made fewer trips for work overall in 2024 compared to 2019.

Shopping and personal business trip rates also decreased for both London and England residents between 2019 and 2024. The proportional decline in travel for these purposes was greater in London than in England.

The trends in trip rates for education and other purposes differed between London and England. While education trip rates were slightly (three per cent) higher in London in 2024/25 than in 2019/20, in England the education trip rate decreased by seven per cent between 2019 and 2024. Trip rates for other purposes decreased by seven per cent in London over this period but increased by eight per cent in England.

Table 3 Change from 2019/20 to 2024/25 (or 2019 to 2024) in trips per person per day by London and England residents, by journey purpose, LTDS from 2019/20 to 2024/25 and NTS from 2019 to 2024.

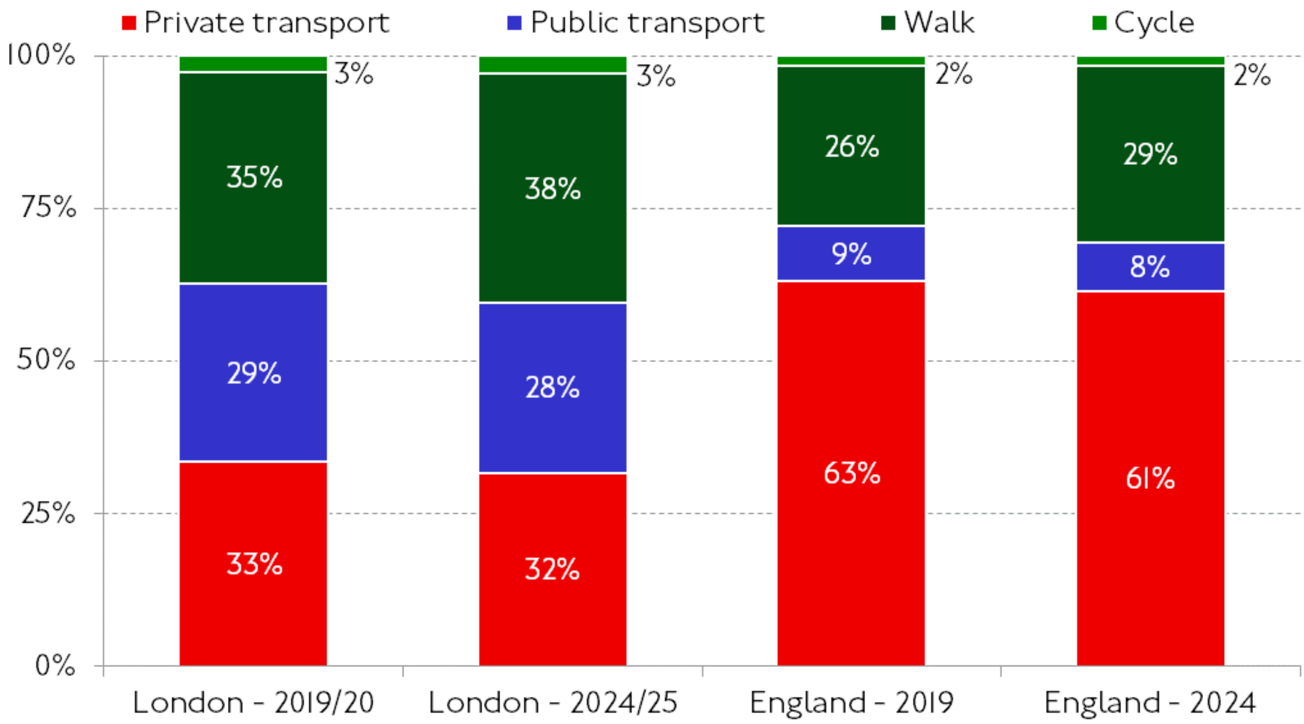
Journey purpose	Change from 2019/20 to 2024/25 – London (percentage)	Change from 2019 to 2024 – England (percentage)
Usual workplace	-11	-21
Other work-related	-23	-12
Education	3	-7
Shopping and personal business	-22	-7
Leisure	1	4
Other (including escort)	-7	8

Source: TfL Strategic Analysis, Customer & Strategy and Department for Transport.

Mode shares

Figure 10 shows the aggregated trip-based mode shares for trips by London residents in 2019/20 and 2024/25, and by England residents in 2019 and 2024.

Figure 10 Trip-based mode shares by London and England residents, LTDS in 2019/20 and 2024/25 and NTS in 2019 and 2024.



Source: TfL Strategic Analysis, Customer & Strategy and Department for Transport.

The graph shows that mode shares were very different in London and England. This is to be expected given the differences in transport policy and provision, particularly the availability and density of public transport networks.

While the mode shares for London residents' travel and England residents' travel showed noticeable differences, the nature of the changes between 2019 and 2024 (or 2019/20 and 2024/25) were similar for both London and England.

Overall, the scale of change in mode shares was small in both London and England over this period. The proportion of trips made by private modes (predominantly private cars) decreased slightly by 1.8 percentage points in London and by 1.7 percentage points in England. The combined mode share of public transport modes also decreased in both London and England, by 1.3 percentage points in London and by 1.1 percentage points in England. The walking mode share increased in both London and England over this period, by 2.9 percentage points in London and by 2.8 percentage points in England. For London, the cycling mode share increased slightly over this period by 0.3 percentage points, while in England it decreased slightly by 0.1 percentage points.

These changes, while generally similar in terms of relative scale and direction, should be viewed in the context of the different mode shares for London and England noted above, with London having much higher mode shares for public transport and active travel than England.

Summary

The key findings of the above comparison of trends in travel between London and England residents based on the LTDS and the NTS, respectively, are as follows:

- There was a long-term trend of gradual decrease in overall trip rates in London and in England since 2005 (or 2005/06). In 2024 (or 2024/25), trip rates had not returned to pre-pandemic levels for either London or England residents. However, the proportional decrease in the average trip rate for London residents was greater, down by nine per cent on 2019/20 based on the LTDS (and by 10 per cent based on the NTS sample for London), compared to a decrease of three per cent from 2019 in England based on the NTS.
- In both London and England, public transport trip rates remained below pre-pandemic levels in 2024 (or 2024/25) with the exception of the London Overground/National Rail trip rate in London, which was two per cent higher than in 2019/20. Bus trip rates recovered more slowly since the pandemic than rail trip rates in both London and England.
- Trip rates by private modes also remained below pre-pandemic levels in both London and England, but with a greater proportional decrease for London residents than for England residents over the period from 2019 to 2024 (or 2019/20 to 2024/25).
- In 2024 (or 2024/25), people continued to commute less frequently on average than in 2019 (or 2019/20). The change was proportionally greater for England than for London, suggesting a faster return to the office in London. Trip rates for other work-related purposes were also lower than in 2019 (or 2019/20) for both London and England.
- Shopping and personal business trip rates were below pre-pandemic levels for both London and England, with a greater proportional decrease in London than in England.
- Mode shares in London and England differed significantly (with London having much higher public transport and active travel mode shares), as is to be expected given the

differences in transport policy and provision between London and England as a whole. While the scale of change in mode shares was relatively small for both London and England, the direction of change was consistent. Mode shares decreased slightly for public transport and private modes between 2019 and 2024 (or 2019/20 and 2024/25), while mode shares for active travel (particularly walking) increased slightly.

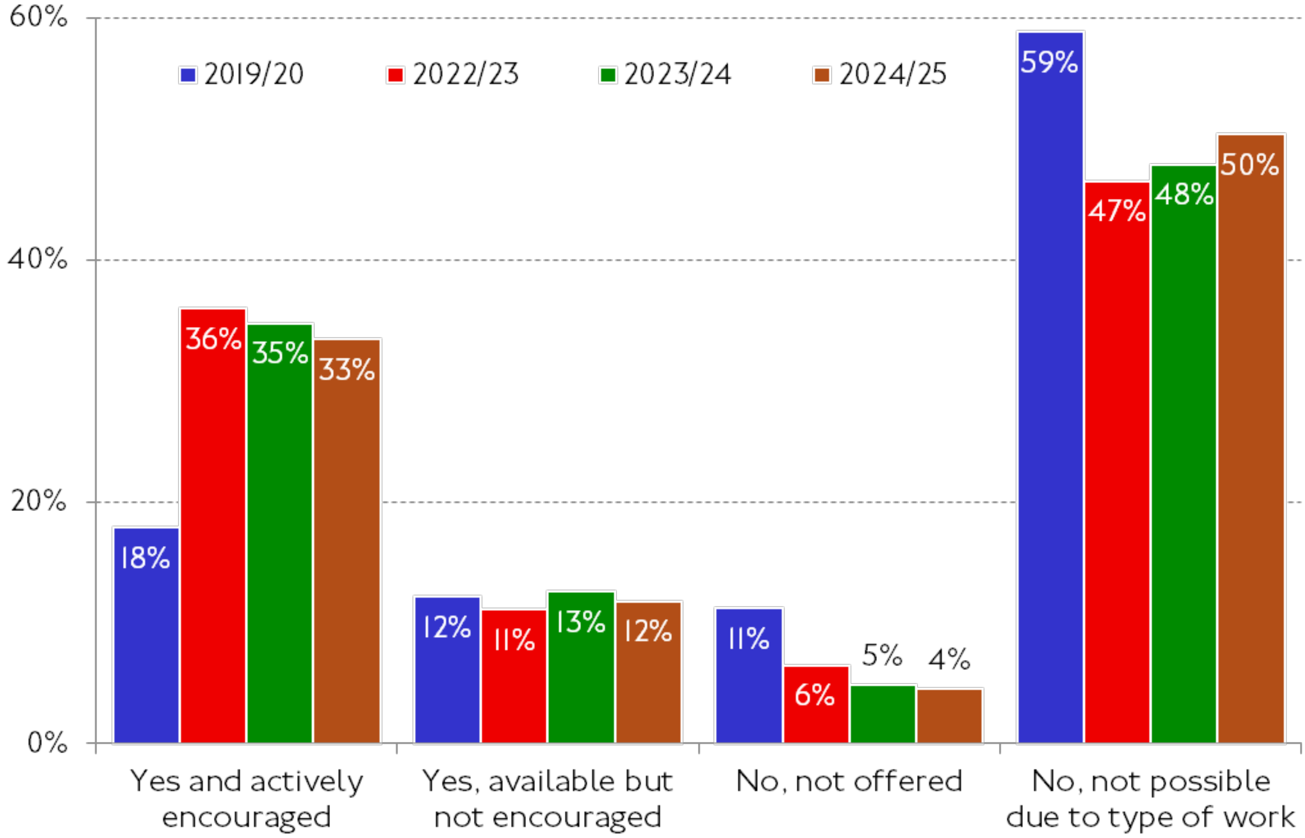
Remote and hybrid working

The pandemic had a significant impact on patterns of working for many people, with remote and hybrid working becoming more common during and after the pandemic and having a significant impact on travel behaviour. While these behavioural patterns have persisted for several years following the pandemic, the extent to which this will become embedded for the long term is still relatively unclear.

Ability to work from home

Figure 11 shows the proportion of London resident workers by ability to work from home in recent years.

Figure 11 Proportion of London resident workers by ability to work from home, LTDS, 2019/20 and from 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

The data shows that in 2019/20 30 per cent of London resident workers reported to be able to work from home and the remaining 70 per cent reporting that they were not. In 2022/23, after the pandemic, the proportion of London resident workers who were able to work from home had increased by 17 percentage points to 47 per cent. The proportion of workers who were able to work from home and were actively encouraged to do so by their employer doubled between 2019/20 and 2022/23, from 18 per cent to 36 per cent.

Between 2022/23 and 2023/24, the proportion of London resident workers able to work from home remained relatively stable, at approximately 47 per cent, before decreasing slightly to 45 per cent in 2024/25.

However, between 2022/23 and 2024/25 the proportion of workers able to work from home and actively encouraged to do so decreased gradually year-on-year from 36 per cent in 2022/23 to 35 per cent in 2023/24 and to 33 per cent in 2024/25. This trend may suggest increased pressure from employers to attend the workplace.

The proportion of London resident workers able to work from home but not encouraged to do so was stable between 2019/20 and 2024/25, fluctuating at around 12 per cent.

Since 2022/23 there was a gradual year-on-year increase in the number of workers reporting being unable to work from home due to the type of work they do (that is, because the work cannot be done from home, for example driving a bus), from 47 per cent in 2022/23 to 48 per cent in 2023/24 and to 50 per cent in 2024/25. The proportion of workers unable to work from home because it is not offered by their employer (that is, because although the work could theoretically be done from home, for example typical office work, the employer does not allow it) decreased from 11 per cent in 2019/20 to six per cent in 2022/23 and continued to decrease year-on-year since the pandemic to four per cent in 2024/25.

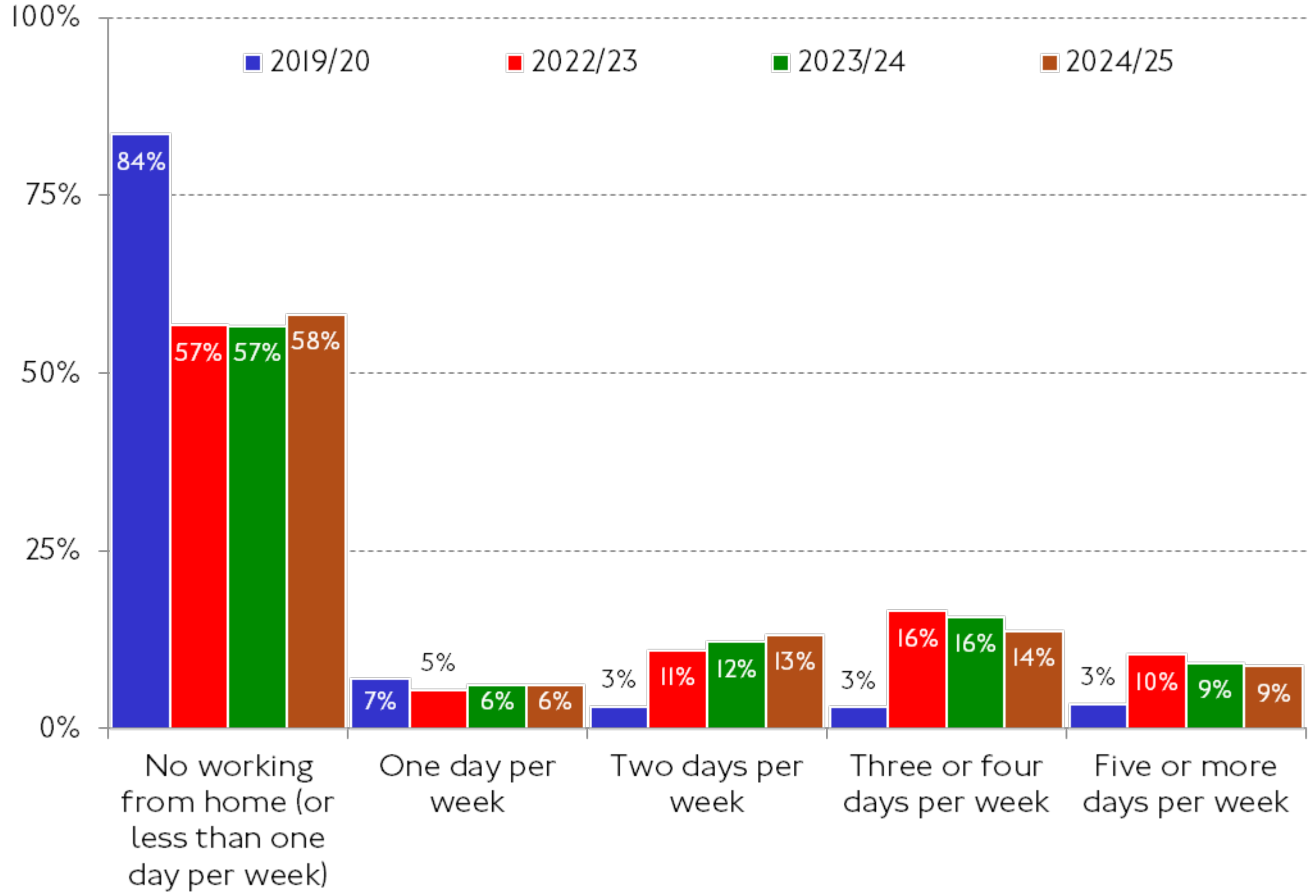
Number of days working from home per week

Figure 12 shows the proportion of London resident workers by number of days working from home in a typical week in recent years.

The graph shows that in 2019/20 84 per cent of London resident workers did not work from home (or did so less than once per week) and 16 per cent worked from home on at least one day per week. Between 2019/20 and 2022/23 the proportion of workers who did not work from home decreased by 27 percentage points to 57 per cent. Since 2022/23, the proportion of workers not working from home regularly remained relatively stable at 57 per cent in 2023/24 and 58 per cent in 2024/25.

While the overall proportion of workers who worked from home at least once a week remained quite stable after the pandemic, the proportion of those working from home on three or more days per week decreased gradually, from approximately 27 per cent in 2022/23 to 22 per cent in 2024/25, indicating that as the pandemic becomes more distant, London resident workers who are able to work from home continued to do so, but less frequently.

Figure 12 Proportion of London resident workers by number of days working from home in a typical week, LTDS, 2019/20 and from 2022/23 to 2024/25.



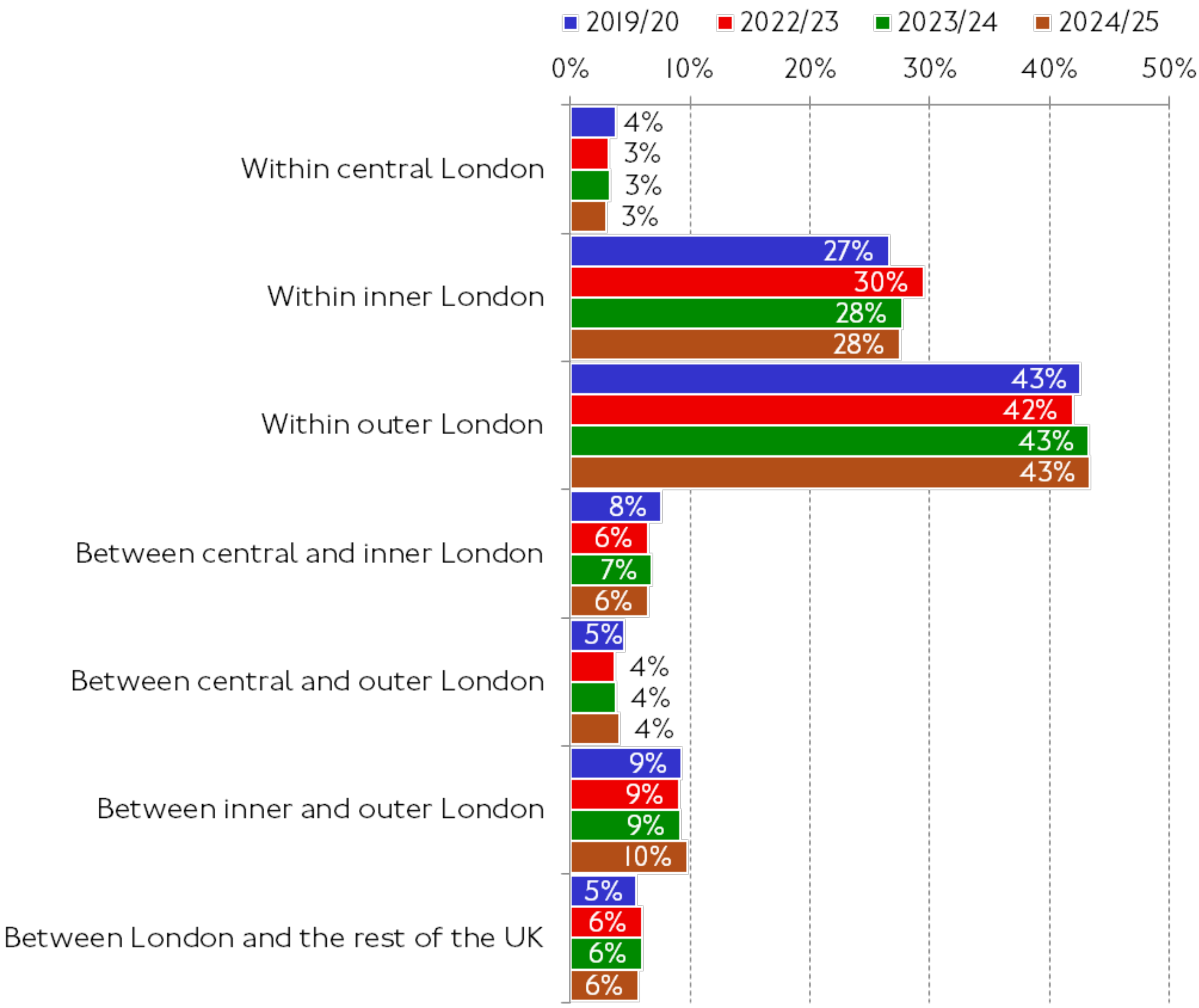
Source: TfL Strategic Analysis, Customer & Strategy.

Travel by London area

Trips by origin and destination areas

Grouping London residents' trips by origin and destination areas into central London, inner London, outer London and the rest of the UK shows that most trips had both an origin and a destination within the same geographical area (figure 13).

Figure 13 Proportion of London resident trips by origin and destination locations, LTDS, 2019/20 and from 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

In 2024/25, 28 per cent of trips were made between origins and destinations in inner London, with a further 43 per cent made between origins and destinations in outer London.

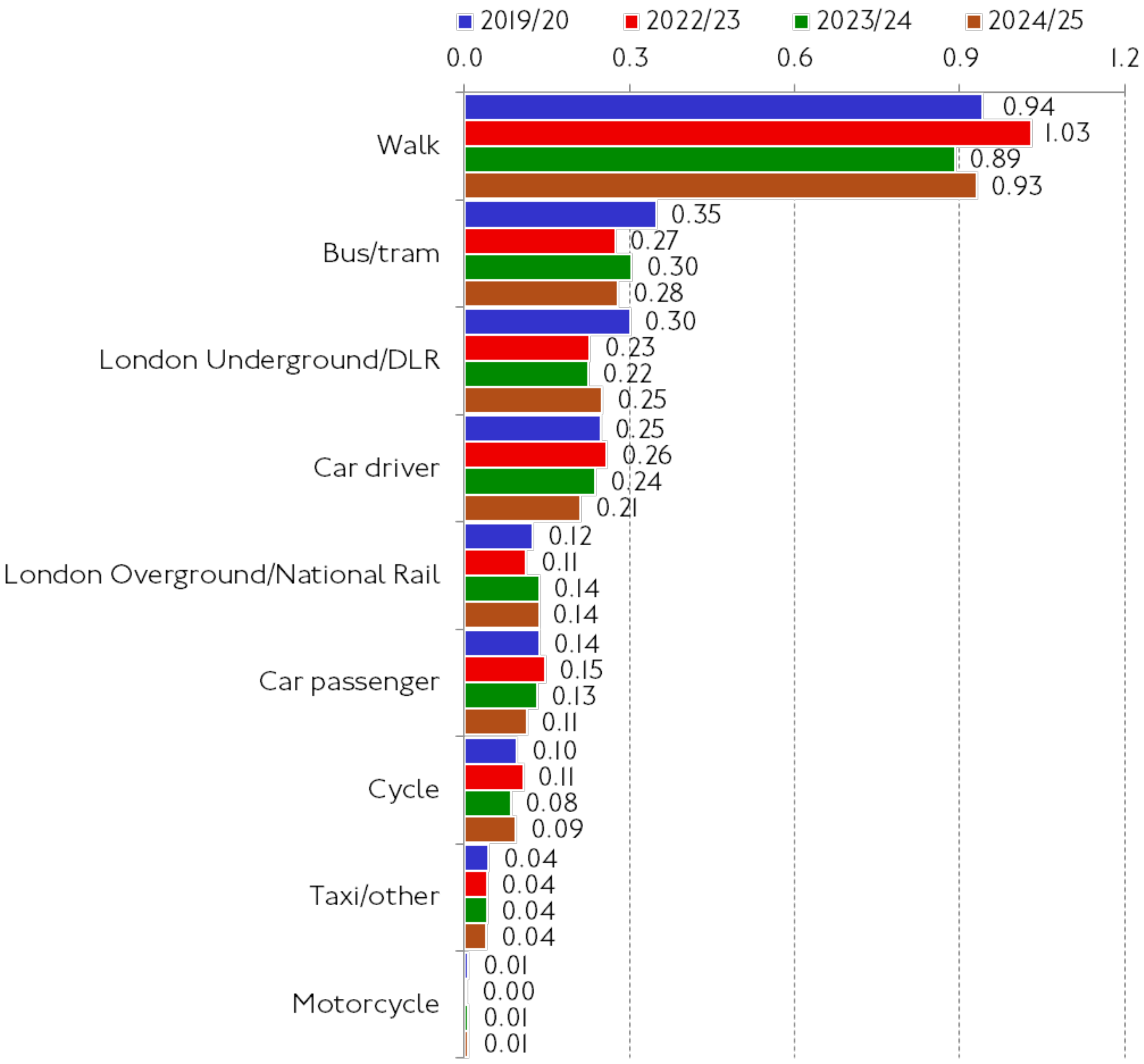
After the pandemic, the proportion of trips to, from or within central London decreased slightly, accounting for 14 per cent of London residents' trips in 2024/25 compared to 16 per cent in 2019/20.

Trip rates by area of residence

The average trip rate for inner London residents in 2024/25 (2.06 trips per person per day) was slightly higher than the London average (2.00 trips per person per day). For outer London residents, the average trip rate was 1.96 trips per person per day. As well as differing in overall trip rates, with inner London residents making five per cent more trips per person per day than outer London residents in 2024/25 (compared to three per cent more in 2019/20), trip rates by mode differed substantially between inner and outer London residents.

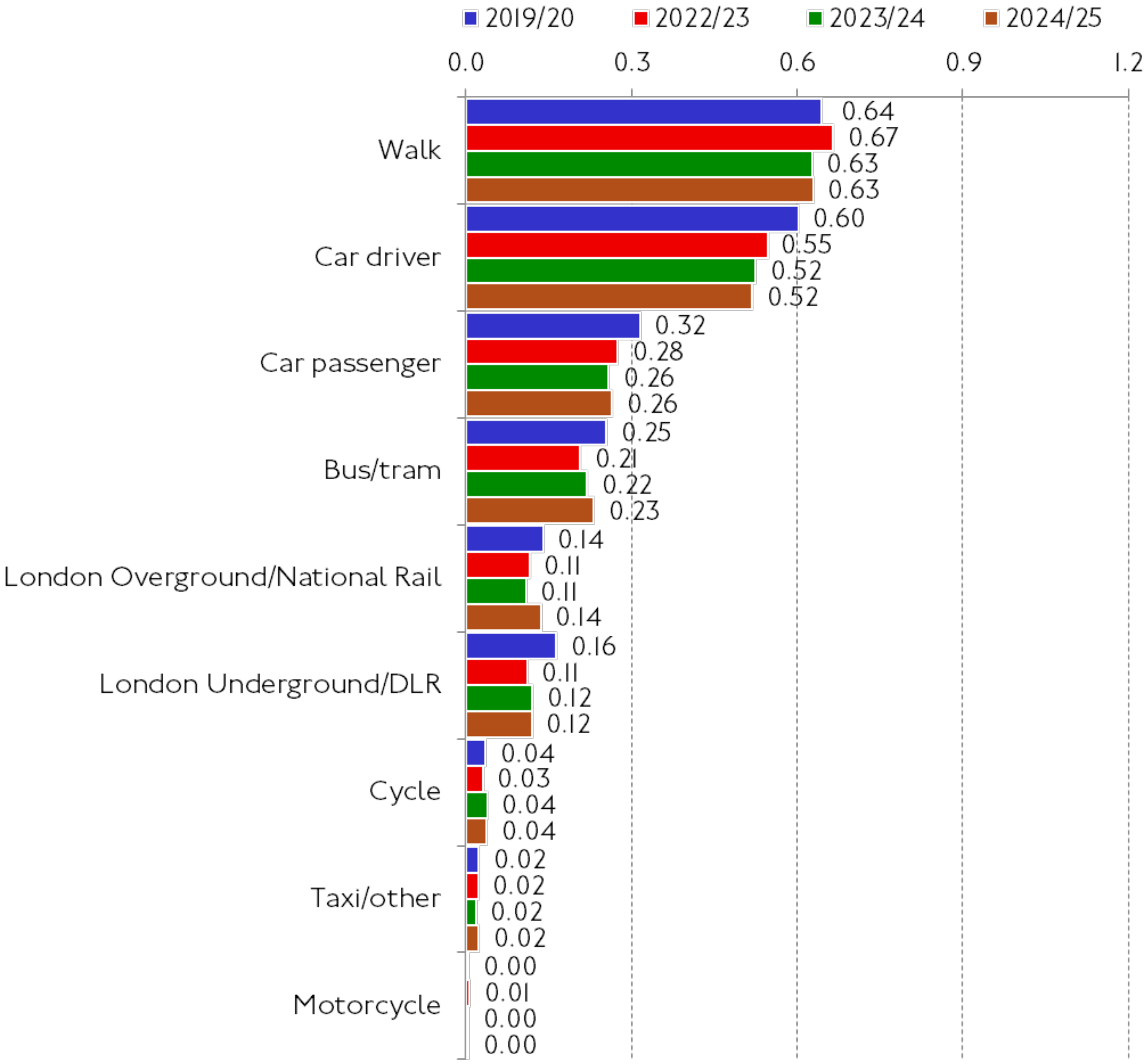
Figures 14 and 15 show trip rates by mode of travel for inner London residents (including central London) and outer London residents, respectively.

Figure 14 Trips per person per day by inner London residents, by mode of travel, LTDS, 2019/20 and from 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

Figure 15 Trips per person per day by outer London residents, by mode of travel, LTDS, 2019/20 and from 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

Trip rates by inner London residents in 2024/25 were highest for walking (all the way) trips, at 0.93 trips per person per day, slightly (around one per cent) below the 2019/20 position of 0.94 walking (all the way) trips per person per day.

For outer London residents, the highest trip rate was also for walking (all the way) trips at 0.63 trips per person per day, slightly below the 2019/20 value of 0.64 walking (all the way) trips per person per day.

The bus/tram trip rate for inner London residents was the next highest trip rate, at 0.28 trips per person per day in 2024/25, following a decrease of eight per cent from 2023/24. This was 20 per cent below the pre-pandemic position of 0.35 trips per person per day in 2019/20.

The London Underground/DLR trip rate for inner London residents increased slightly in 2024/25 to 0.25 trips per person per day, its highest point since 2019/20, while remaining

17 per cent below the 2019/20 position. In 2024/25, the London Overground/National Rail trip rate for inner London residents remained at 0.14 trips per person per day, nine per cent above 2019/20.

Public transport trip rates for outer London residents were substantially lower than for inner London residents, with the most pronounced difference in the London Underground/DLR trip rate, which for outer London residents was less than half of the equivalent figure for inner London residents. Between 2019/20 and 2024/25, trip rates decreased for outer London residents across all public transport modes, with bus/tram down by nine per cent, London Underground/DLR down by 28 per cent, and London Overground/National Rail down by three per cent.

Car driver and car passenger trip rates for inner London residents continued to decrease in 2024/25 to the lowest levels on record, reaching 0.21 and 0.11 trips per person per day, which was 14 and 16 per cent below 2019/20, respectively.

Among outer London residents car driver and car passenger trip rates in 2024/25 were much higher (0.52 and 0.26 trips per person per day, respectively); however they decreased by similar proportions (by 14 and 16 per cent, respectively) from 2019/20 as the equivalent trip rates for inner London residents. The car driver trip rate for outer London in 2024/25 was the lowest on record, down 47 per cent relative to 2005/06, while the car passenger trip rate was the second lowest (2023/24 was the lowest).

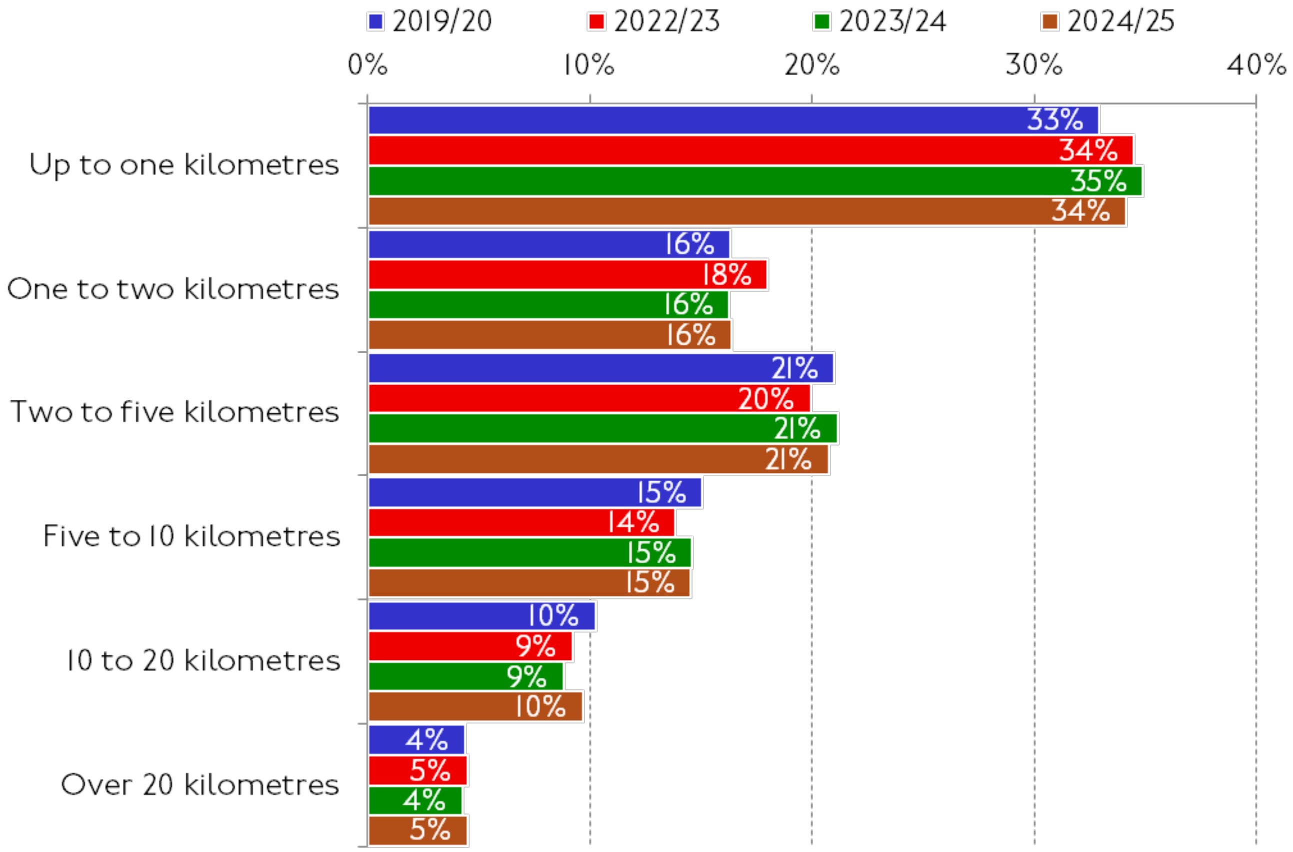
The cycling trip rate for inner London residents increased slightly in 2024/25, while remaining three per cent below the 2019/20 level. For outer London residents, the cycling trip rate remained at 0.04 trips per person per day and was comparable to the pre-pandemic value.

Travelled distances and time spent travelling

Trips by length

Figure 16 shows the proportion of London residents' trips by trip length in recent years. Note that the estimated trip lengths used in this analysis are straight line distances from origin to destination.

Figure 16 Proportion of trips by London residents by length, LTDS, 2019/20 and from 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

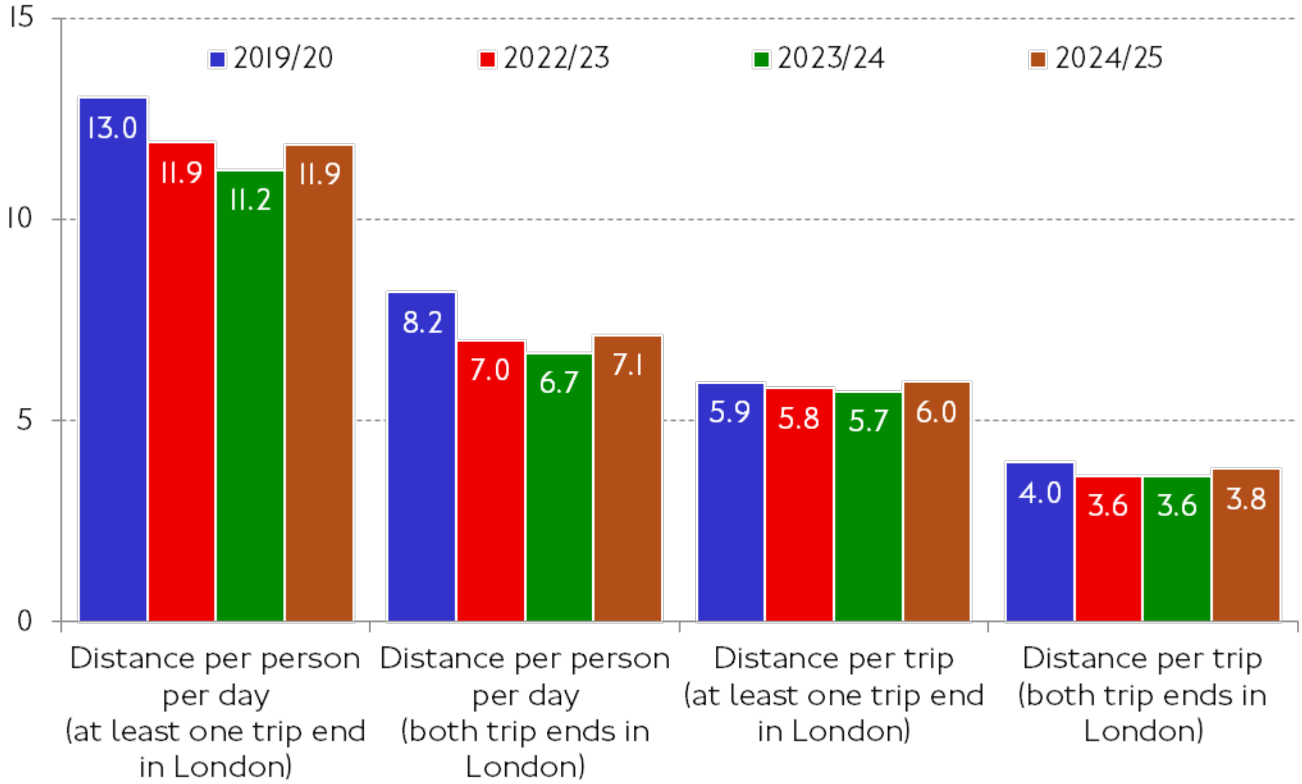
Most trips by London residents are short in terms of distance travelled. In 2024/25, 34 per cent of trips were one kilometre or less in length and a further 16 per cent were between one and two kilometres long. Overall, 71 per cent of trips were five kilometres or less in length and only 15 per cent of trips were longer than 10 kilometres, with only five per cent longer than 20 kilometres.

Between 2019/20 and 2022/23 there was a three-percentage-point increase in the proportion of trips under two kilometres (from 49 per cent to 52 per cent) and a decrease in the proportion between two and 20 kilometres (from 46 per cent to 43 per cent). This change was consistent with the reduction in the proportion of commuting journeys after the pandemic, since commuting trips are typically longer than the average trip. There was also a slight increase in the proportion of trips longer than 20 kilometres. Overall, the distribution of trips by length remained relatively stable in recent years and the distribution in 2024/25 was similar to the distribution in 2019/20 but with a slightly higher proportion (two percentage points) of trips under two kilometres.

Distance travelled per person and per trip

Figure 17 shows the average distance travelled per trip and per person per day in recent years.

Figure 17 Distance (in kilometres) travelled per trip and per person per day by London residents by trip origin and destination location, LTDS, 2019/20 and from 2022/23 to 2024/25.



Source: TfL Strategic Analysis, Customer & Strategy.

The average distance travelled per person per day in 2024/25 (for **trips with at least one trip end in London**) was 11.9 kilometres. This was an increase of approximately six per cent from 2023/24, while remaining nine per cent below 2019/20. The average distance per trip for trips with at least one trip end in London also increased slightly (by approximately five per cent) from 5.7 in 2023/24 to 6.0 in 2024/25.

For comparison, the NTS shows that the average trip distance for England residents was approximately 10.6 kilometres in 2024, with England residents travelling approximately 26.8 kilometres per person per day in 2024. Note that the distances recorded in the NTS are based on the actual trip length as reported by the traveller and not the straight-line distance as for the LTDS.

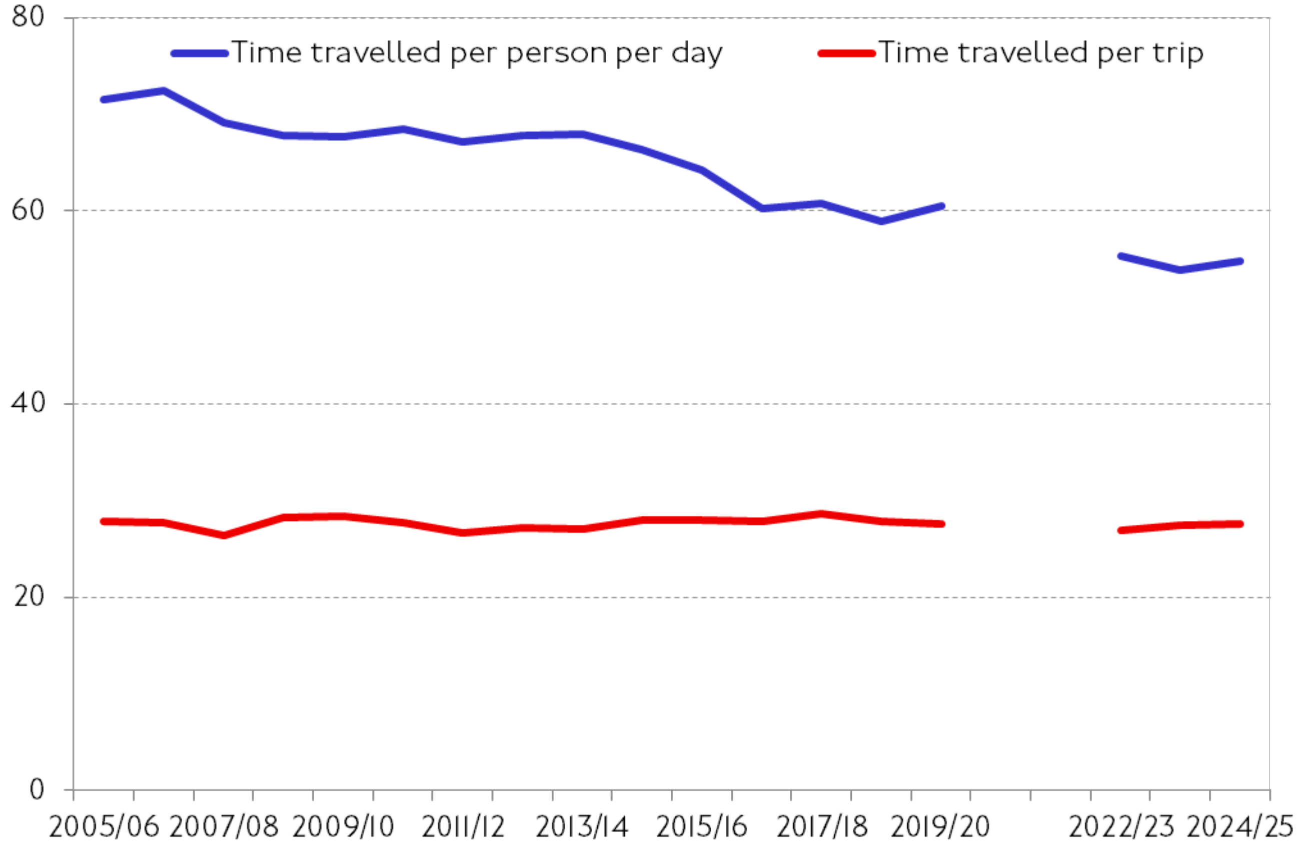
Considering only trips with **both trip ends in London**, the average distance travelled per person per day in 2024/25 was 7.1 kilometres. This was an increase of six per cent relative to 2023/24, while remaining 13 per cent below 2019/20. The distance travelled per trip for trips wholly within London increased slightly (by approximately five per cent) between 2023/24 and 2024/25 and was four per cent below the 2019/20 position in 2024/25.

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

Time travelled per person and per trip

Figure 18 shows how the average time travelled per trip and per person per day changed over the lifetime of the LTDS from 2005/06 to 2024/25.

Figure 18 Time (in minutes) travelled per trip and per person per day by London residents, LTDS, from 2005/06 to 2024/25.



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.

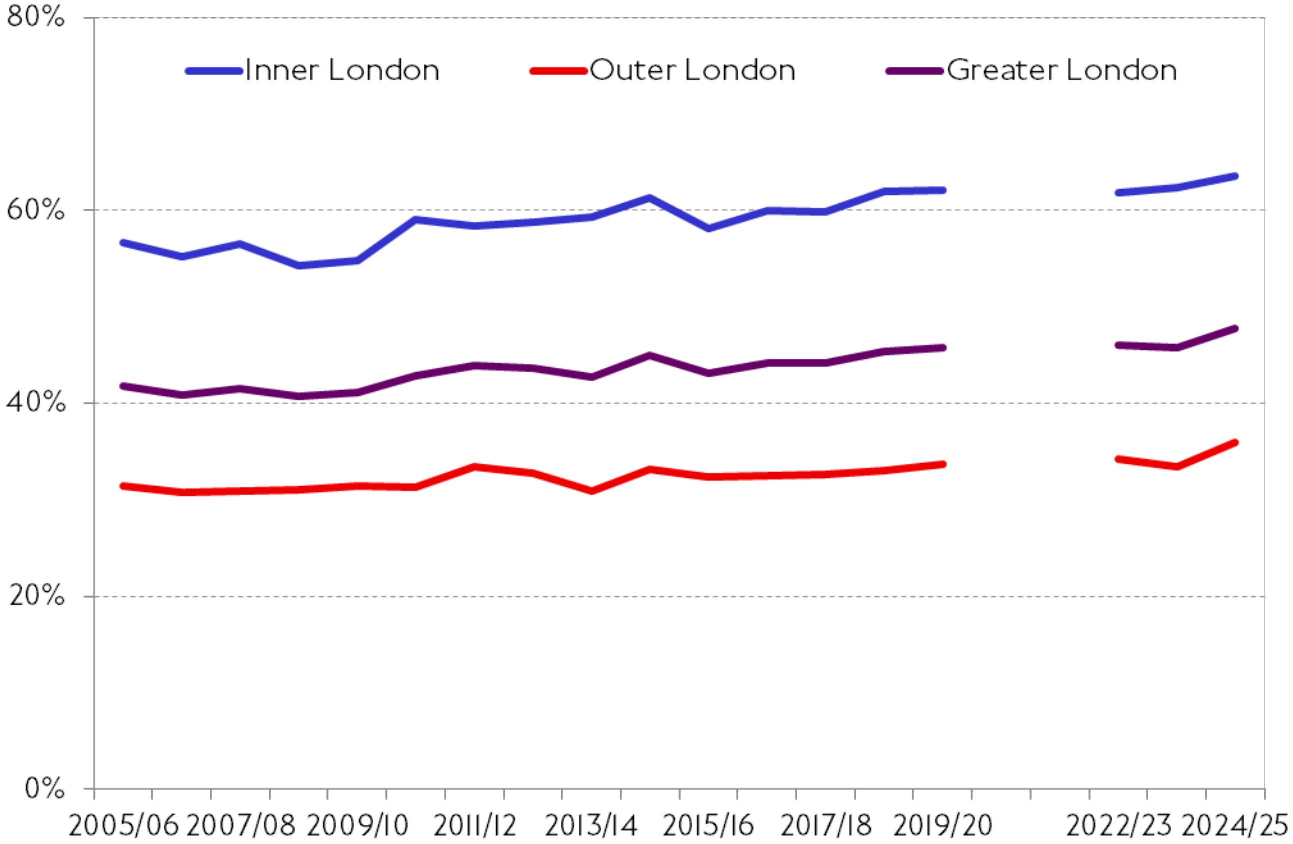
The time spent travelling per trip remained relatively stable, with an average of approximately 27.6 minutes travelled per trip. In 2024/25, it was 27.6 minutes, in line with the historic average.

In contrast, there is a long-term trend of decrease in the time travelled per person per day. Bearing in mind that the data shows that average trip durations changed very little, it is clear that the decrease in time travelled per person per day is a result of the long-term decrease in trip rates (see figure 1 above). In 2024/25, the average time travelled per person per day was 54.8 minutes, a slight increase on 2023/24, but nine per cent below the 2019/20 position and 24 per cent below the high point of 2006/07, reflecting similar proportional differences in trip rates.

Household car ownership

Figure 19 shows the long-term trend of decreasing rates of car ownership in London. This long-term trend continued between 2023/24 and 2024/25, with the proportion of London households which did not own a car increasing by two percentage points from 46 per cent in 2023/24 to 48 per cent in 2024/25.

Figure 19 Proportion of London households which do not own a car, by London area, LTDS, from 2005/06 to 2024/25.



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 2024/25, 64 per cent of inner London households and 36 per cent of outer London households did not own a car. This was an increase of just over one percentage point relative to 2023/24 for inner London and an increase of just less than three percentage points relative to 2023/24 for outer London. Relative to 2005/06, there was an increase of just less than seven percentage points for inner London and just less than five percentage points for outer London.

In 2024/25, the proportion of London households which owned more than one car also continued to decrease in inner and outer London. The proportion of London households which owned more than one car decreased to 11 per cent in 2024/25, five percentage points below 2005/06. For inner London, the proportion of households with more than one car was four per cent, down two percentage points from 2005/06. For outer London, the proportion was 17 per cent, down six percentage points from 2005/06.

A number of factors are thought to be influencing these long-term trends, including improvements to public transport and the reallocation of road space to active, efficient and sustainable modes, which have encouraged more sustainable mode choices and which may have enabled some London residents to rely less on car ownership. More recently, there has also been a reduction in the proportion of young London residents learning to drive, which has been further impacted by cost-of-living pressures. Other lifestyle changes arising from the pandemic, such as increased remote working and a reduction in trip rates, may also be having an impact on the rates of car ownership.