

Travel in London, report 14 TfL, December 2021

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5.3 Cycling in London

Introduction

Following a rapid increase in the early 2000s and into the mid-2010s (particularly in central London), cycling volumes grew at a slower rate in the years just before the coronavirus pandemic. The picture during the pandemic itself has however been encouraging, albeit that restrictions on survey conduct limit the available data.

Key indications are that cycling has proven to be one of the most resilient modes during the pandemic, with a lower-than-average drop in demand following the first lockdown in March 2020 and a faster-than-average recovery to demand levels similar and sometimes exceeding those seen before the pandemic, all of this in the context of reduced activity and travel more generally.

This has been especially true for Santander Cycles (TfL's cycle hire scheme), which, despite predominantly operating in central London, has continued to break its own record levels of use despite the pandemic.

Bearing in mind the substantial overall reductions to activity and travel in general during much of 2020, and the great variability in travel during the pandemic, our provisional estimates of cycling levels in spring 2021 (based on a cross-sectional survey) were: down by 16.4 per cent in central London but up by 4.6 per cent in inner London and by 19.9 per cent in outer London, compared to spring 2019.

These outcomes reflect large-scale geographical changes to the nature of people's trip making, in particular a large reduction in radial commuter cycling trips, to and from work locations in central London and increases in leisure-based cycling in inner and (particularly) outer London.

Cycling during the pandemic

Breaking this down further, it is apparent that the nature of cycling in London underwent a comprehensive transformation during the pandemic.

The dramatic reduction in commuter cycling, due to workplace restrictions, has been compensated by an increase in home-based leisure trips (a 'purpose shift'). Furthermore, where people used to cycle most days a week before the pandemic they do so slightly less frequently now (a 'frequency shift'), reflecting a combination of flexible working practices among the cycling commuters and a second-order effect of the 'purpose shift' noted above. Also as a second-order impact of the change in purposes there has been a 'temporal shift' of cycling demand, with large reductions in the busy weekday peak periods that existed before the pandemic and increases in off-peak periods, including the weekday inter-peak but mostly and to a much larger extent on weekends. Finally, the changes in the origin and destination of trips from mostly radial commuting trips to circular or orbital home-based trips has also shifted the balance in the spatial distribution of cycling volumes (a 'spatial shift'), with a decrease observed in central London and increases in inner and outer London.

The adaptability of cycling and robustness of the out-turn numbers to the many challenges posed by the pandemic speak for the resilience of this mode to different travel contexts, and the potential to further embed these travel behaviours into the recovery.

Long-term trends in cycling volumes and the pandemic impact in 2021

TfL has an extensive programme of area-based cycle counts across London that provide cycling volume estimates for central London (Congestion Charge zone) on a quarterly basis and for inner and outer London once a year.

Between 2015 and 2019, the number of kilometres cycled across Greater London increased by almost 5 per cent, with most of the growth in this period observed in central London (7 per cent), followed by inner (6 per cent) and outer London (2 per cent).

Table 5.1 compares year-on-year change in cycling volumes across London. Due to pandemic restrictions (see footnotes to table for details), it was not possible to conduct full counts during 2020, but the survey programme was able to resume in spring 2021. The results from the spring 2021 counts are compared against those from spring 2019. It is necessary to recognise that the spring period of 2021 was not necessarily representative of the whole year, due to the extent of formal pandemic restrictions affecting travel during the survey period.

Table 5.1 Estimates of year-on-year change in cycling volume, spring 2016-2021.

	Central London	Inner London	Outer London	London total
2016	-0.3%	-3.7%	-3.4%	-3.2%
2017	0.8%	7.2%	5.7%	5.8%
2018	8.3%	2.0%	7.5%	4.9%
2019	-1.6%	0.5%	-7.1%	-2.7%
2020	-24.0% ₁	7.5% ₂	24.4% ₂	n/a
2021 (from 2019)	-16.4% ₃	4.6% ₃	19.9% ₃	n/a

Source: TfL Traffic Data.

1: Central London cycling data could not be collected in the spring quarter of 2020 due to the lockdown restrictions and thus this value represents the change in the summer quarter 2020 (Jun-Sep) with respect to that same quarter in 2019.

2: Inner and outer London data could not be collected in the spring quarter of 2020 due to the lockdown restrictions and thus the collection was postponed to autumn 2020 (Oct-Dec) and the panel of count locations reduced by about a third. Therefore, these values represent the change in cycle flows on the subset of sites that were counted in autumn 2020 with respect to the flows on those same sites in spring 2019 (note the difference in season). The change is provided at face value without seasonal adjustments.

3: At the time of writing only a subset of the full panel of sites counted in spring 2021 have been validated. The figures provided here are therefore provisional and represent the change in cycle flows on the subset of available sites in spring 2021 with respect to the flows on those same sites in spring 2019 (note that the baseline is two years earlier).

Our provisional estimates of cycling recovery in spring 2021 (compared to the 2019 baseline) show a move towards the pre-pandemic status quo. For central London, this means that the large reduction in cycling volume observed in 2020 has recovered by a noticeable amount, while for inner and outer London it means that the increases in cycling seen during 2020 (when for long periods cycling was one of the few permitted activities) had started to fall back, albeit still showing encouraging cycling levels above 2019, by 4.6 per cent and 19.9 per cent in inner and outer London, respectively.