Transport in the City – Data summary

When reading this summary, please note all graphs and figures are placeholders for final versions with improved legibility and format

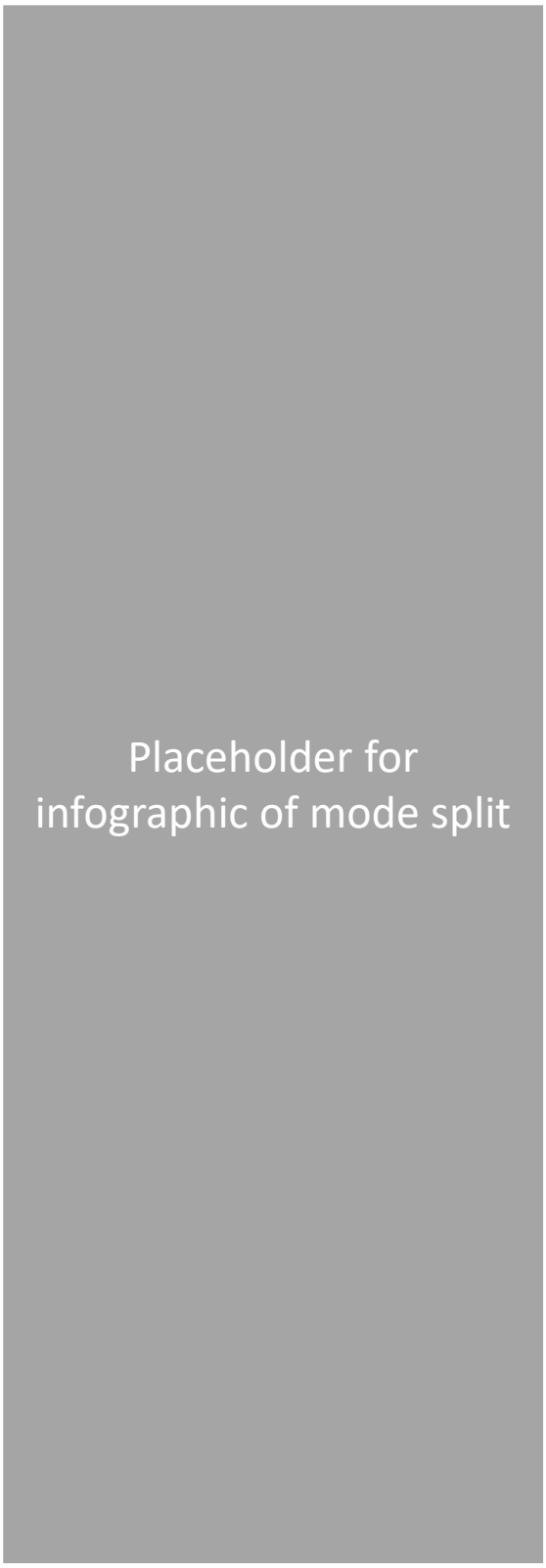
Introduction

Understanding how people move around the City is important to inform what we do and where we need to focus attention. The last five years has seen some unexpected impacts and we have been continuing to collect data so we can see if travel patterns have changed and understand longer term trends.

We are also gradually making changes to the street network which will continue to make a difference to the ways in which people travel around the City. We will report annually on data collection for both traffic and people movements. This document provides a short summary of recent data and analysis that has informed the review of the Transport Strategy. This is supplemented by data from TfL on public transport movements and other travel patterns for a wider area.

London Travel Demand Survey (2017/2018 - 2019/2020) data shows that 97% of all trips to, from, and around the City were made by walking and wheeling (33%), cycling (5%) and public transport (60%) between 2017-2019. Fewer than 3% of trips were made by other modes such as private car, taxi, private hire, and motorcycle.

While this data was collected before the COVID-19 pandemic, we believe it is still broadly representative of current travel behaviour.Walking remains by far the main mode of travel within the City both pre- and post-pandemic and a significant majority of people travelling to the City still do so by public transport and cycle.



How the City looks – changes since the Transport Strategy was adopted.

The impact of recent changes to the City's streets alongside global events like the COVID-19 pandemic and cost of living crisis have and continue to change the way people travel to, through and around the City, which is important to understand in reviewing the Transport Strategy. Understanding these changes has become even more important to ensure our policies and projects deliver the best value and outcomes for City residents, workers, students and visitors.

Strategic Traffic Count Data

The City Corporation has conducted a City-wide traffic survey roughly every two years during the autumn since 1999 to better understand the levels and patterns of traffic in the City.

These surveys collect data on the volumes and types of travel modes using the City's streets. The survey was expanded in 2016 from 12 to 24 hours in length and in 2017 to include people walking and wheeling.

The most recent traffic survey was conducted on 23rd November 2022 at 31 sites across the City (Figure 1 below), 30 of which are currently used in reporting and analysis.

The distribution of sites has been selected to ensure a representative spread of types and locations in the City are sampled as part of the survey. In 2023 this included three sites on the Transport for London Road Network (TLRN), including two sites on the Bishopsgate/Gracechurch Street corridor and 26 sites on other streets in the City.

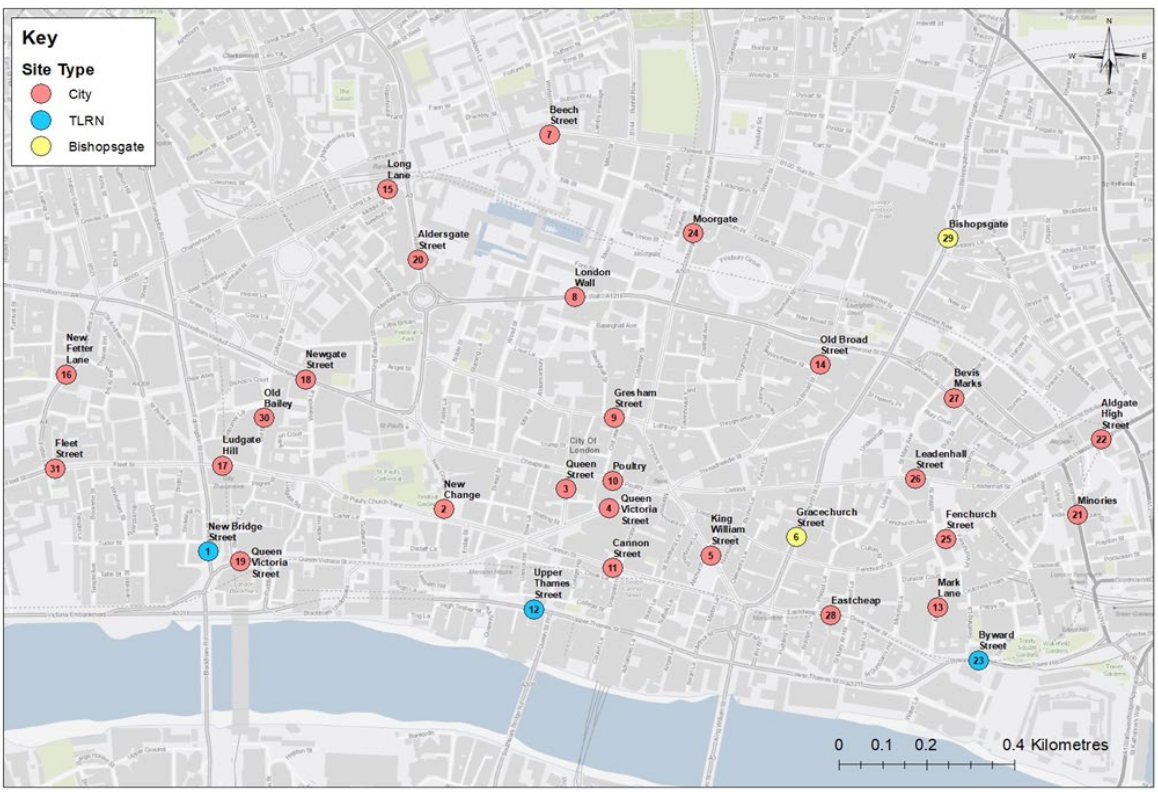


Figure 1 - Strategic vehicle and pedestrian traffic count sites in the City

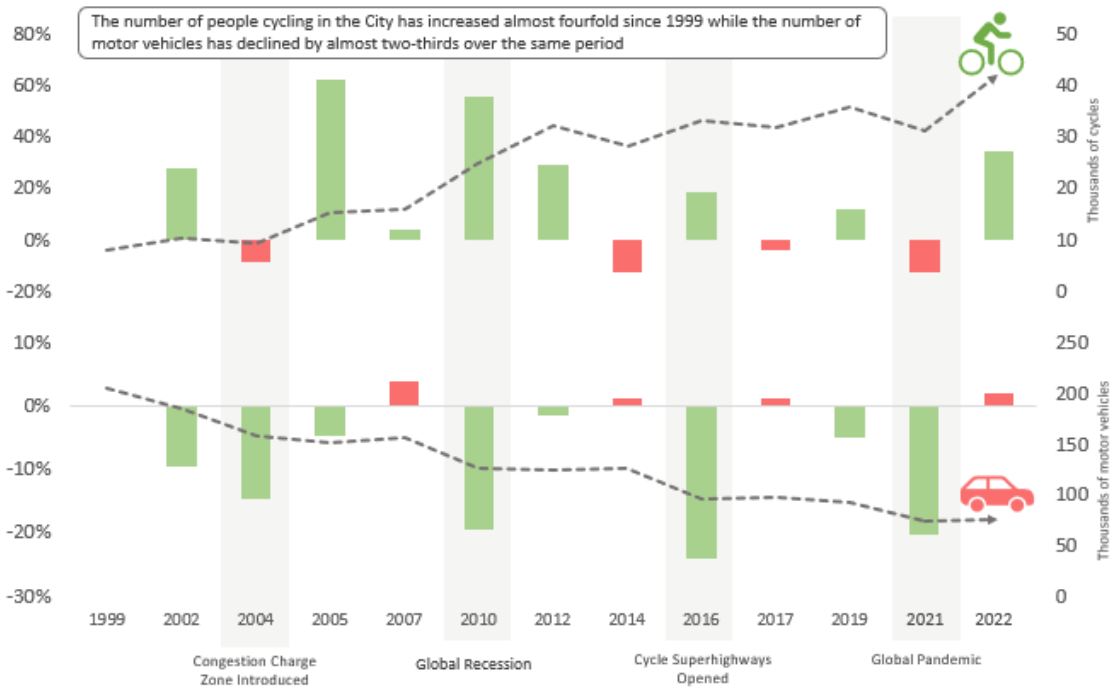


Figure 2 - Long term trends in daytime (7am to 7pm) motor vehicle and cycle volumes

Long-term trends in traffic

City traffic composition has changed significantly over the last two decades (Figure 2 above), both in terms of the total volume of traffic and the proportions of different vehicle types that make up that traffic.

The total number of vehicles counted at our 12 core survey sites has declined overall since counting began in 1999 from a high of over 200,000 vehicles that year to just over 73,000 in 2022 (or nearly a two-thirds decrease).

Most of the decrease in volumes has been observed during or immediately after significant changes or events in the City of London or the global economy, including the introduction of the Congestion Charge Zone in 2003, the Global Recession in 2008-09, the introduction of Cycle Superhighways in the City in 2015-16 and most recently the COVID-19 pandemic in 2020-22.

Other factors, such as national increases in rail travel and street space reallocations on City streets, have also likely had an impact on motor traffic volumes over time.

In contrast, the number of cycles counted has increased nearly four-fold since 1999. Most of this increase took place between 1999 and 2012 and specifically after the introduction of the Congestion Charge Zone and the Global Recession.

Long-term cycling volume trends at a different subset of 15 count sites suggest that daytime cycling activity in the City has not changed significantly since 2012. However, considering changes to working patterns from hybrid working and noting that pedestrian count volumes were only at 65% of pre-pandemic levels when these counts were undertaken, this data suggests that there has been a significant increase in the proportion of people cycling to or through the City.


Placeholder page for photo

Progress on Transport Strategy Key Performance Indicators

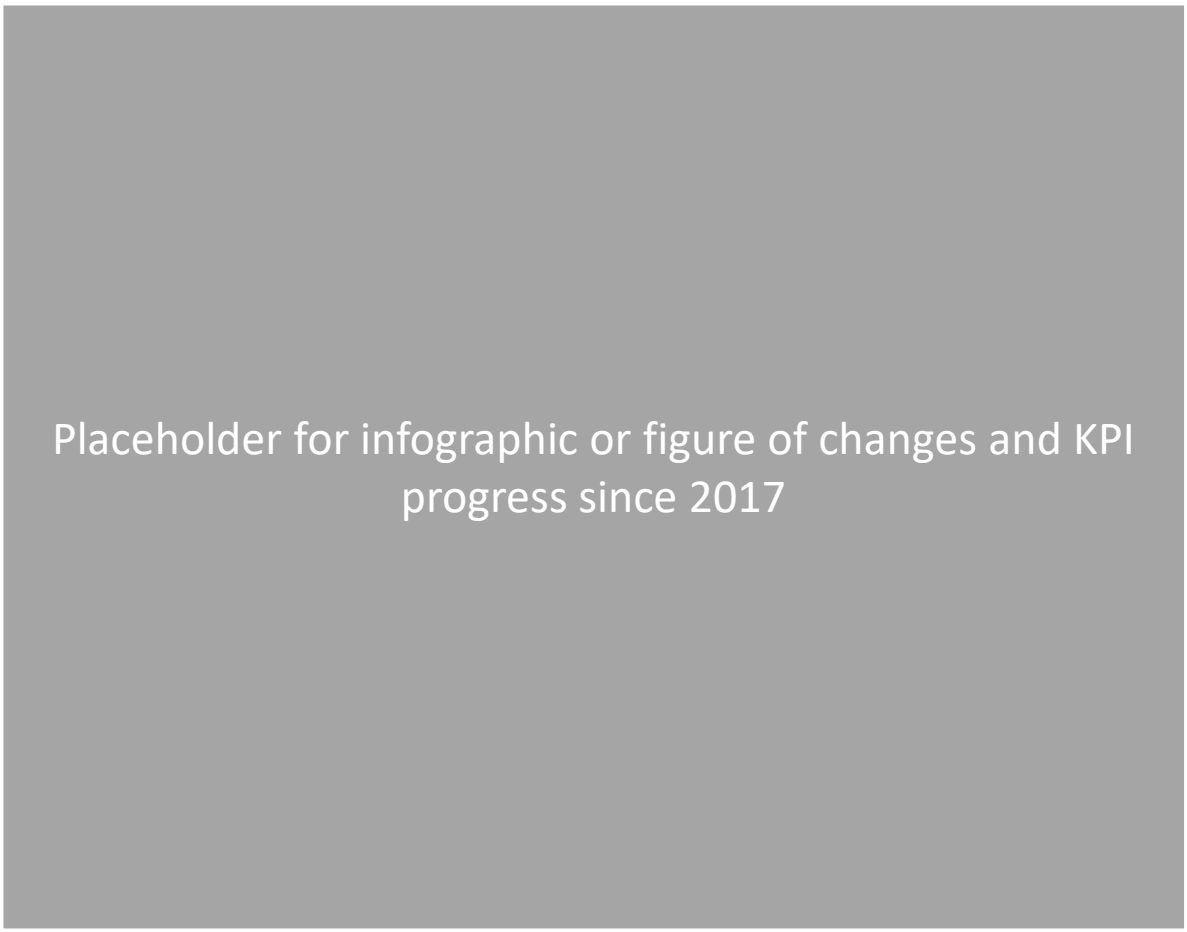
Most of the changes observed in this analysis are in alignment with City of London Transport Strategy policies and targets to reduce the number of motor vehicles and increase the number of people cycling on City streets. Progress against the Transport Strategy's key targets is summarised below.

Reduction in motor vehicle volumes
The number of motor vehicles counted over a 24-hour period has decreased 26% since 2017, exceeding our 2030 target of a 25% reduction.

Reduction in freight vehicle volumes
The number of freight vehicles counted over a 24-hour period has decreased 14% since 2017, nearly meeting our 2030 target of a 15% reduction.

Peak-time reduction in freight vehicle volumes
The number of freight vehicles counted during the morning and evening peak periods has decreased 11%, which is not on-track for meeting our 2030 target of a 50% reduction.

Increase in cycling volumes
The number of cycles counted over a 24-hour period has increased 7% since 2017, which is not on-track for meeting our 2030 target of a 50% increase.



Comparisons between pre-pandemic and current traffic & travel

The change in the numbers of motor vehicles and cycles counted in our 2019, 2021, and 2022 surveys is shown below in Figure 3.

In 2022, over the 24-hour count period a total of approximately:

- 299,500 motor vehicles were counted, a 20% decrease from 2019 (pre-pandemic) levels
- 88,800 people cycling were counted, a 2% increase from 2019 levels
- 670,100 people walking and wheeling were counted, a 35% decrease from 2019 levels

The number of motorcycles, taxis, cars and private hire vehicles counted in 2022 are further below 2019 pre-pandemic levels than other modes such as lorries or vans.

In the case of taxis and private hire vehicles, there has been a decline both in London and nationally in the number of licensed taxis and private hire vehicles from pre-pandemic levels, with the number of licensed taxis and private hire vehicles in London at 73% and 91% of pre-pandemic levels respectively.

In 2022, people cycling made up a greater proportion of traffic than cars and private hire vehicles during the daytime (27% and 26% respectively) and were the single largest mode of travel counted on our streets between 7am to 7pm.

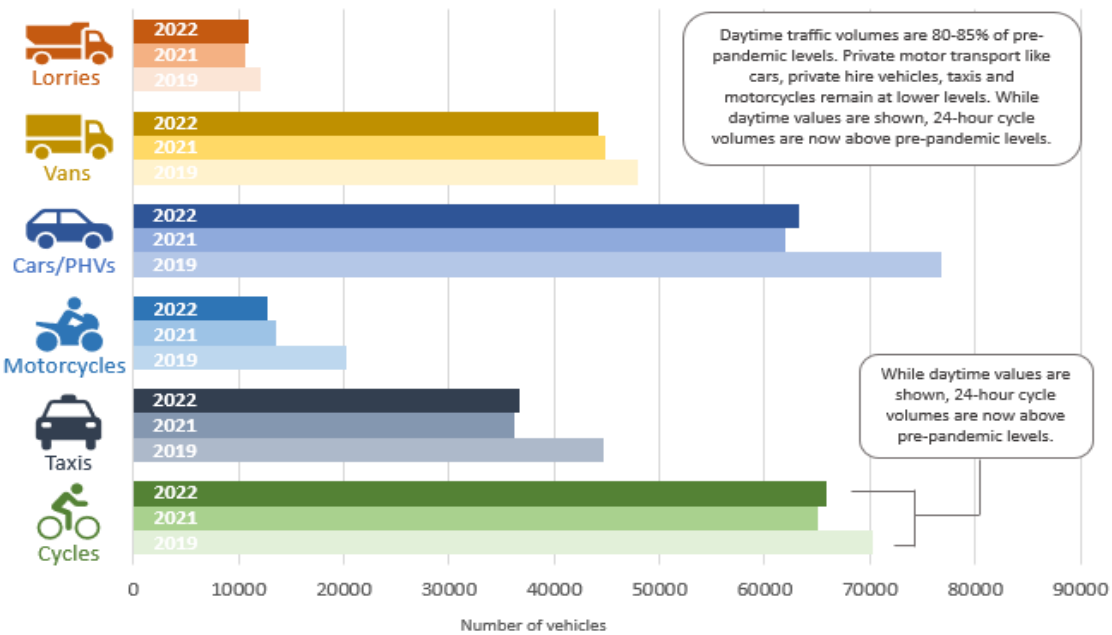


Figure 3 - Changes in daytime (7am to 7pm) traffic volumes from 2019 to 2022

Walking and wheeling data

Pedestrian traffic count data is a useful proxy for footfall activity and levels on City streets. The breakdown of the counts of people walking and wheeling by hour across 24-hours in 2019 count and our most recent 2022 count is shown below in Figure 4.

The number of people counted in November 2022 was at 65% of 2019 pre-pandemic levels. The greatest difference between pre- and post-pandemic footfall was seen between 9:00 and 10:00, with 50% fewer people counted.

Evening footfall levels since the pandemic have increased more than daytime footfall and is at approximately two-thirds of pre-pandemic levels. Overall, count data suggests that a greater proportion of walking and wheeling now occurs outside of peak periods.

Wheelchair and pram user traffic data has been regularly collected at our strategic count sites across the City since 2017 and 2021 respectively. In 2022, wheelchair users make up a very small percentage of all people walking and wheeling in the City, accounting for approximately 0.01% of all people counted in 2022 (or approximately 1 in 10,000). Similarly, pram users made up a small percentage (0.2% or approximately 1 in 500).

Most wheelchair and pram users were observed travelling in the City between 8am and 8pm, with pram user counts peaking around 3pm and wheelchair user counts peaking around 5pm.

Some disabilities are not visible and some parents do not use prams. These statistics do not provide any significant indication of the number of disabled people or parents using our streets. We are reporting on this for the first time as part of our commitment to a more inclusive approach to monitoring.

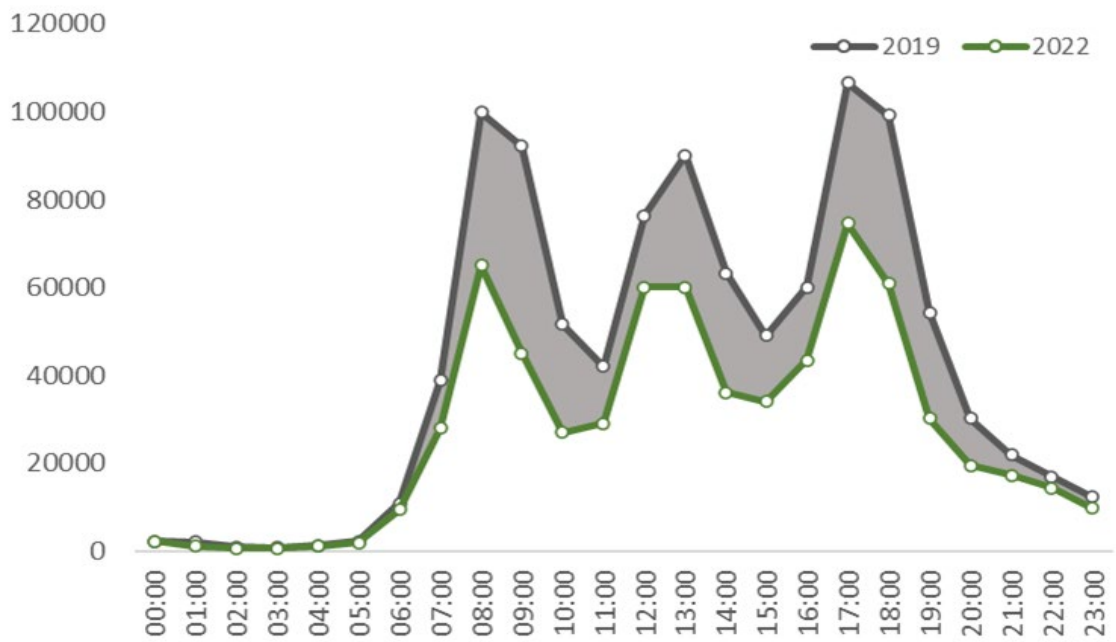
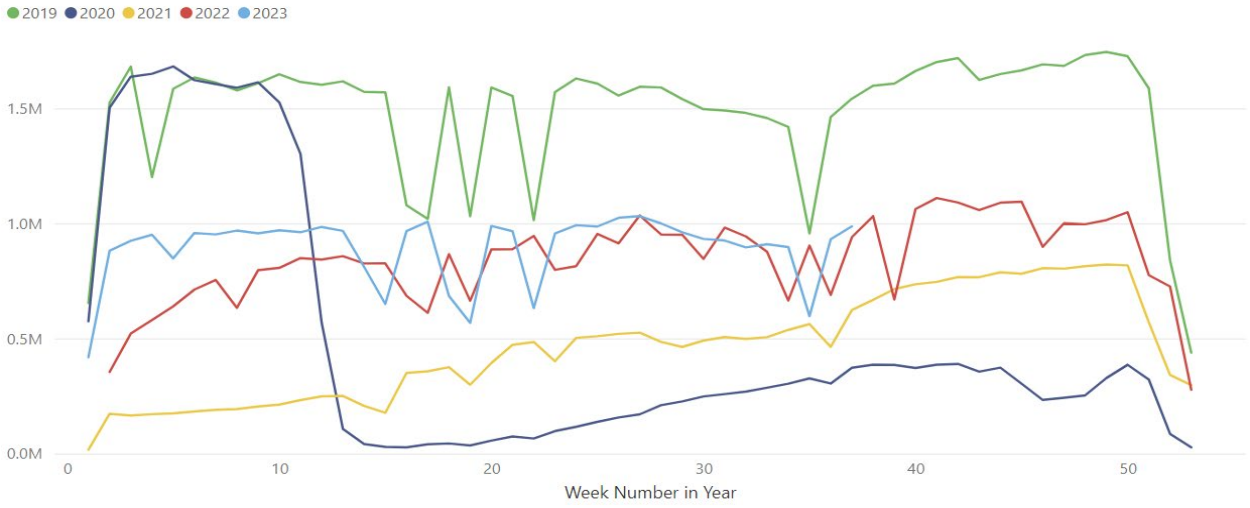
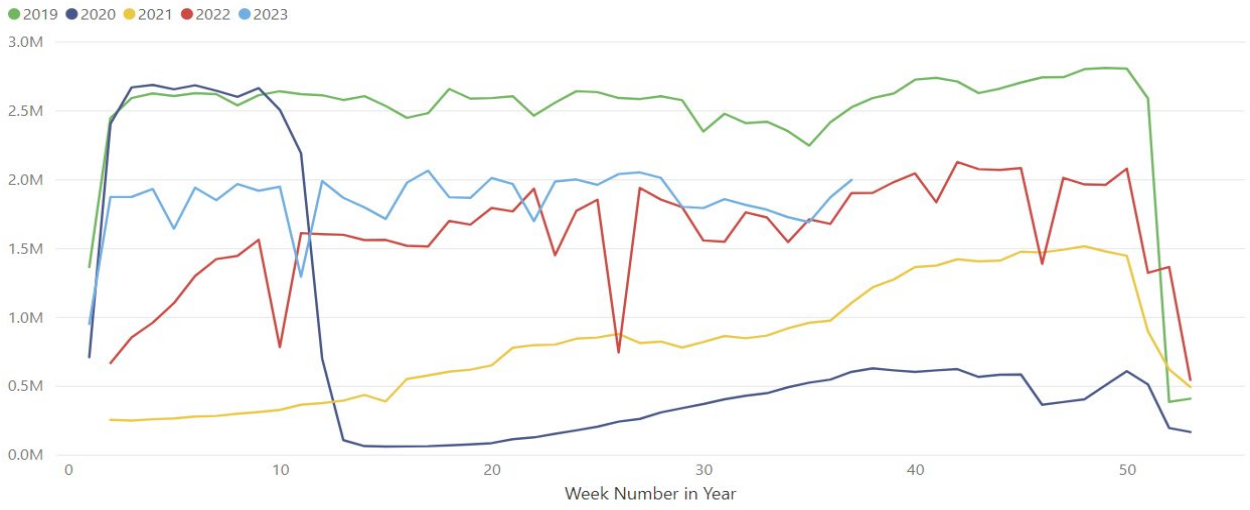


Figure 4 - Pedestrian volumes counted by hour in 2019 and 2022

Figures 5 & 6 - Entry and exit data for Monday and Friday (top) and Tuesday, Wednesday, and Thursday (middle) summed by week since 2019 for the 11 Underground stations in the City





Trends in London Underground station activity

TfL track London Underground station entry and exit ('gateline') data.

This data aligns well with observed weekday pedestrian volumes on City streets, which were at approximately 65% of pre-pandemic levels in November 2022. As such it can be considered representative of wider activity levels in the Square Mile

Entry and exit data for Monday and Friday (top) and for Tuesday, Wednesday and Thursday (bottom) summed by week since 2019 for the 11 Underground stations in the City are shown in the figures above.

Data from June of each year since 2019 has shown a year over year increase in the amount of weekday activity at City stations:

- 32% of pre-pandemic levels in June 2021
- 61% of pre-pandemic levels in June 2022
- 71% of pre-pandemic levels in June 2023

Weekend activity is now above pre-pandemic levels.


Placeholder page for photo

Road collisions and casualties

Data relating to collisions and casualties on the streets of the Square Mile is published by Transport for London each June for the previous calendar year. Unfortunately, 2022 figures show a significant increase in the number of serious injuries with a total of 59, compared with 40 and 41 in 2021 and 2020 respectively, (Figure 7 below), an increase of 48% on the previous year. Numbers of serious injuries in 2022 are still significantly lower than numbers seen in 2018 and 2019 (82 and 76 respectively).

Whilst the increase in the numbers of people seriously injured represents a reversal of the progress made in recent years, it is set against the backdrop of increasing levels of travel in the City, when compared to the previous two years during the pandemic.

Indeed, most London boroughs have recorded an increase between 2021 and 2022, with a 10% increase in fatal and serious injuries across inner London (11% for Greater London). The increase in serious casualty numbers is largely driven by an increase in the number of people injured whilst walking (11 in 2021 to 17 in 2022) and people cycling (20 in 2021 to 27 in 2022).

Post Covid-19 collision and casualty data also suggests a shift in mode, gender and season when collisions are occurring, with greater collisions numbers observed in the summertime, involving men, and in the evening period than observed over the previous three years.

The recent increase in fatal and serious injuries alongside the shift in when and where collisions are being observed underlines the importance of the City Corporation and City Police's Vision Zero ambition and the need to deliver further action to reduce road danger.

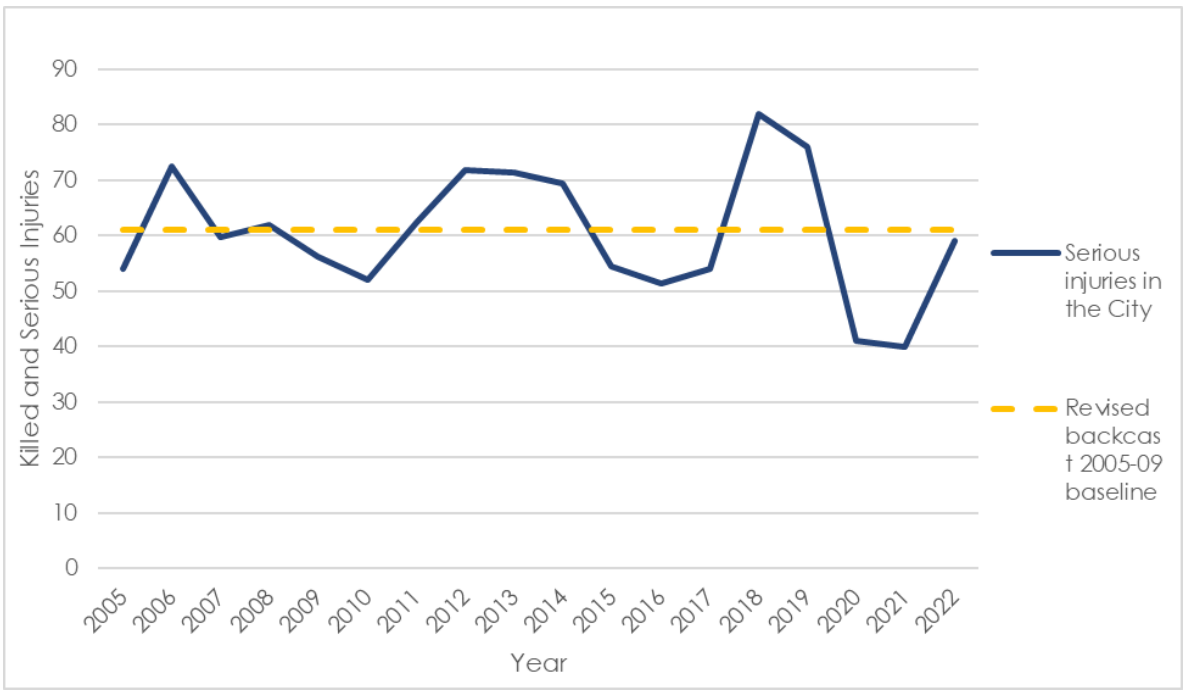
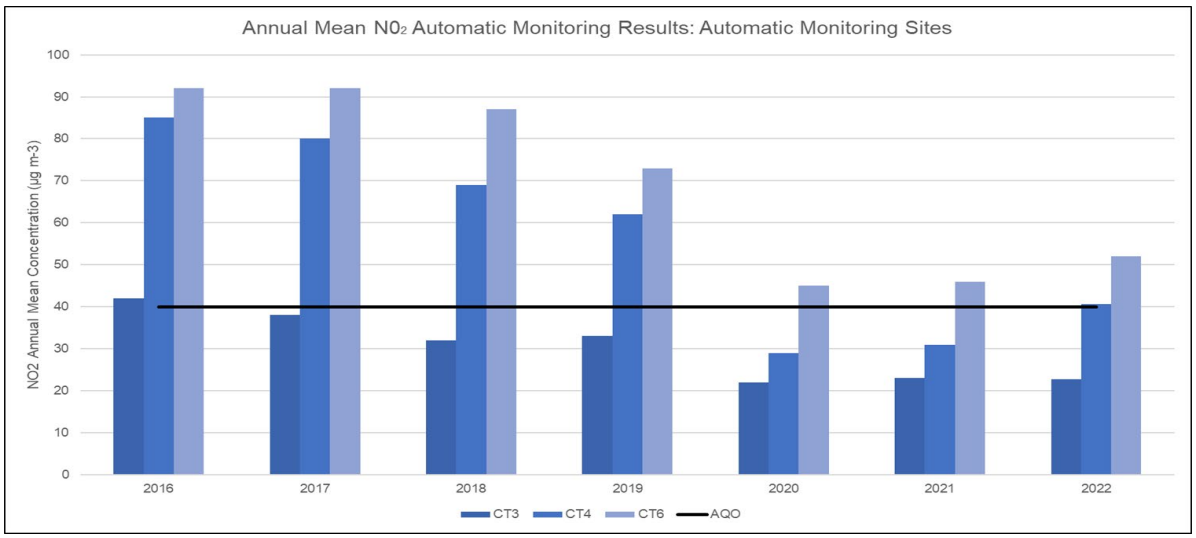


Figure 7 - Number of people killed and seriously injured in collisions on City streets by year

Figure 8 - Annual mean NO2 automatic monitoring results at automatic monitoring sites



Air quality data

Motor traffic in the Square Mile is a significant contributor to nitrogen dioxide (NO2). It also impacts on particulate matter (PM), though to a lesser extent, as particulate matter is made up of many sources, some of which travel very long distances and stay in the air for a long time. The Transport Strategy outcome 'The Square Mile's air and streets are cleaner and quieter' includes proposals that are directly aimed at improving air quality.

Overall, there have been improvements in air quality across the City over the last five years, with some recent fluctuations likely the result of pandemic impacts on traffic volumes. The ULEZ restrictions have also contributed to an improvement in air quality in the City.

NO2 is measured using continuous analysers at two roadside sites (Walbrook Wharf and Beech Street) and one urban background site (The Aldgate School). Both roadside sites in 2022 exceeded the UK legal annual limit of 40 µg/m3: Beech Street was within legal limits during 2020 and 2021 but now just exceeds it at 41µg/m3.

Walbrook Wharf on Upper Thames Street, carrying high volumes of through traffic on the TLRN, continues to exceed annual objective at 52µg/m3.

PM10 pollution levels are measured continuously at three sites: Beech Street, Upper Thames Street and The Aldgate School. All sites saw a slight increase in PM10 annual average pollution levels compared to 2021, though levels remained below that of 2020.

PM2.5 is measured using continuous analysers at two locations: Farringdon Street and the Aldgate School. Concentrations are similar at both sites as it is a regional pollutant and strongly influenced by weather conditions. In 2022 there was a very slight increase in annual average concentration of PM2.5 at both sites.

More detail is available in 'City of London Air Quality Annual Status Report for 2022' available at: https://www.cityoflondon.gov.uk/assets/Services-Environment/air-quality-annual-status-report-city-of-London-2022.pdf.

City Streets Public Survey

Between 28 November and 19 December 2022, a public survey of 981 workers, residents, students, and visitors was undertaken to understand perceptions on transport and the public realm.

It asked respondents to describe their travel patterns and reflect on their perceptions of transport in the Square Mile.

Overall, perceptions of transport and the walking environment within the City of London were positive. Most respondents found travelling to/from and around the City easy, with older respondents tending to find this more difficult than younger respondents.

Nearly half of respondents stated that they do not experience any barriers or challenges when travelling to, from or around the City.

The most common barriers or challenges identified by respondents were:

- Congestion on the street network,
- Impacts of strikes,
- Delays/cancellations to public transport; and
- Crowding on public transport and streets.

There were concerns expressed about air quality in the City, with around two in five respondents perceiving the air in the City to be unclean - the most disagreed with of all the positive statements listed in the survey.

Figure 9 below shows the 10 transport strategy outcomes ranked on their importance to respondents, with 'Creating streets that are accessible to all' as the most.

All outcomes received considerably more positive responses than negative responses.

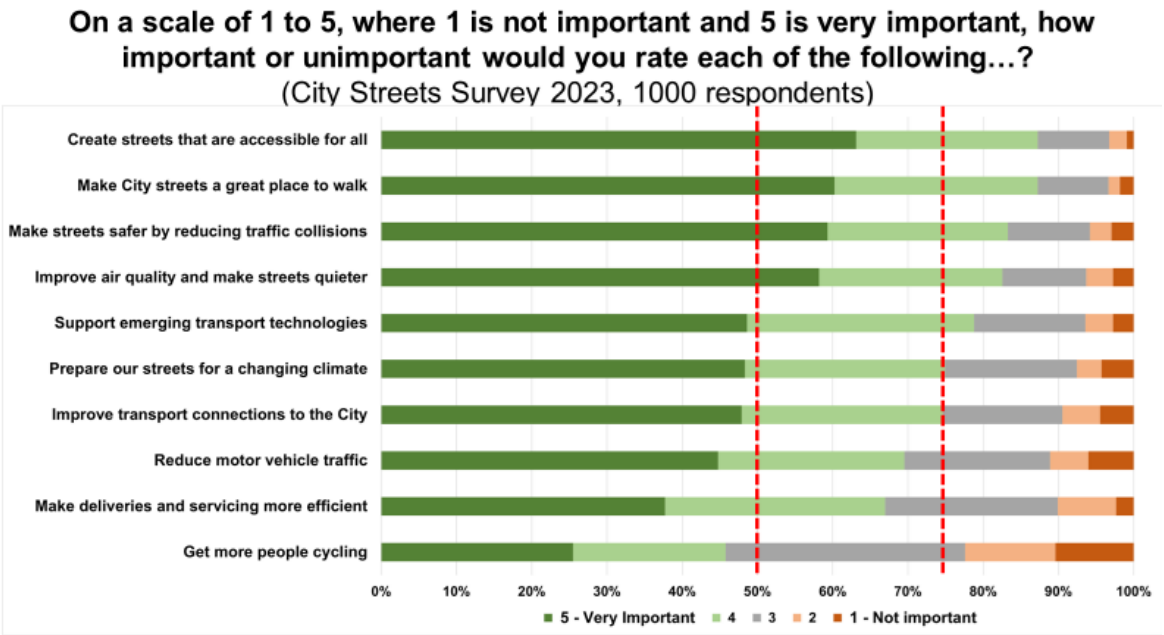


Figure 9 - City Streets Survey 2023 results for importance ranking of current Transport Strategy Outcomes


Placeholder page for photo