December 2023

Travel in London 2023

Supporting new homes and jobs

MAYOR OF LONDON

TRANSPORT FOR LONDON
EVERY JOURNEY MATTERS

Travel in London 2023

Supporting new homes and jobs

2023 update

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Summary of key findings

This report provides a summary of key trends relating to the Mayor's Transport Strategy aims regarding London's Opportunity Areas. It also reviews findings from a 2023 cordon-based count survey of travel to and from the Olympic Legacy Opportunity Area, comparing these to earlier surveys and wider transport and regeneration aims in and around the Olympic Park.

Opportunity Areas

- A total of 49,369 homes have been delivered in adopted Opportunity Areas over the April 2019 to March 2022 period, which represents 14 per cent of the 2041 London Plan indicative capacity for new homes in adopted Opportunity Areas. This is in line with the rate required to deliver this by 2041.
- Prior to 2022 the proportion of London residents and residents of Opportunity Areas living in areas with a high Public Transport Access Level (PTAL) had been steadily increasing. However, in 2022 the proportion of Opportunity Area residents living in high-PTAL areas declined. This was mainly due to timetable changes on the National Rail network and, to a lesser degree, on the bus network, largely reflecting post pandemic conditions. This has continued into 2023, resulting in a similar proportion of residents living in high-PTAL areas as in 2022.
- Travel by active, efficient and sustainable modes is a key principle of Good Growth. Monitoring the mode share of trips with an origin or destination in an Opportunity Area shows that between 2019/20 and 2022/23 there has been a four percentage point increase in walk mode share, but a six percentage point decrease in public transport mode share. The change in mode share is likely due to pandemic-related changes to travel demand, particularly an increase in working from home, with a reduction in commuting predominantly impacting trips made by public transport. Overall, the share of trips made by walk, cycle or public transport has fallen by one percentage point between 2019/20 and 2022/23, from 76 per cent to 75 per cent.

Travel to the Olympic Legacy Opportunity Area

- A 2023 count of trips crossing two cordons surrounding the Olympic Legacy Opportunity Area provides a comparison with earlier counts in 2013 and 2015 and gives an update on total travel demand and mode shares for travel to this area.
- At the inner cordon, closely surrounding the Olympic Park, including Stratford City and Westfield, there was an increase in trips of 82 per cent between 2013 and 2023, with a 10 per cent increase between 2015 and 2023, equating to 117,700 trips per day in 2023.
- The percentage of trips made by active, efficient and sustainable modes at the inner cordon was 78 per cent in 2023, the same as in 2015, both being a slight reduction from the 82 per cent recorded in 2013.
- At the outer cordon, which encloses a much wider area of inner east London, the trend in total travel is less clear, with fluctuations across the three counting years.

Total inbound trips (note this cordon does not count walking trips) in 2023 were 362,700, compared to 393,800 in 2015 and 384,300 in 2013.

- Private car accounts for over half of all trips across the outer cordon, accounting for 53 per cent of all inbound trips in 2023, compared to 55 per cent in 2015 and 57 per cent in 2013. The absolute number of car trips has also decreased, by 29,000 between 2013 and 2023, a reduction of 13 per cent. This cordon crosses several major roads and therefore counts 'through' vehicle trips not necessarily interacting with the area.
- A feature of the 2023 data at the outer cordon is a reduction in bus trips, from 20 per cent of trips in 2015 to 16 per cent in 2023. This is in line with a 25 per cent decline in Londonwide bus trips between 2013/14 and 2022/23. Noteworthy however has been the growth in cycle trips - from 8,890 trips in 2013 (two per cent of all inbound trips) to 17,709 in 2023 (five per cent of all inbound trips).
- The percentage of trips made by London residents with an origin in the six Olympic Growth boroughs (Barking & Dagenham, Greenwich, Hackney, Newham, Tower Hamlets and Waltham Forest) has progressively increased since the Games. The active, efficient and sustainable mode share of the Growth boroughs has increased from 68 per cent in 2014/15 to 74 per cent in 2022/23, five percentage points higher than the Greater London average. This compares to 67 per cent for boroughs outside of the Olympic Legacy area.
- This suggests that there has been a positive long-lasting effect of the London Olympics on the active, efficient and sustainable mode share of trips originating in Olympic Growth boroughs.

Opportunity Areas

Opportunity Areas are designated through the London Plan as areas with particular development potential. They have an important role in delivering the 66,000 extra homes per year that London needs.

A list of Mayoral commitments for ensuring that Opportunity Areas fully realise their growth and regeneration potential is set out under London Plan policy SD1. This policy sets out the role of TfL in promoting and championing Opportunity Areas as well as in identifying where public investment and intervention is required to achieve growth potential.

TfL's monitoring work in Opportunity Areas is based around the Mayor's Transport Strategy principles of Good Growth, focusing on housing delivery, access to public transport and travel by active, efficient and sustainable modes.

Previous monitoring, reported in Travel in London report 15, covered the 29 Opportunity Areas with 'adopted' boundaries as of 2022. Adopted Opportunity Areas are sites with a defined boundary contained within a local planning document that has been subject to formal adoption by a local planning authority and/or the Mayor. This year's monitoring includes two further Opportunity Areas, Kensal Canalside and Royal Docks and Beckton Riverside.

Monitoring housing delivery

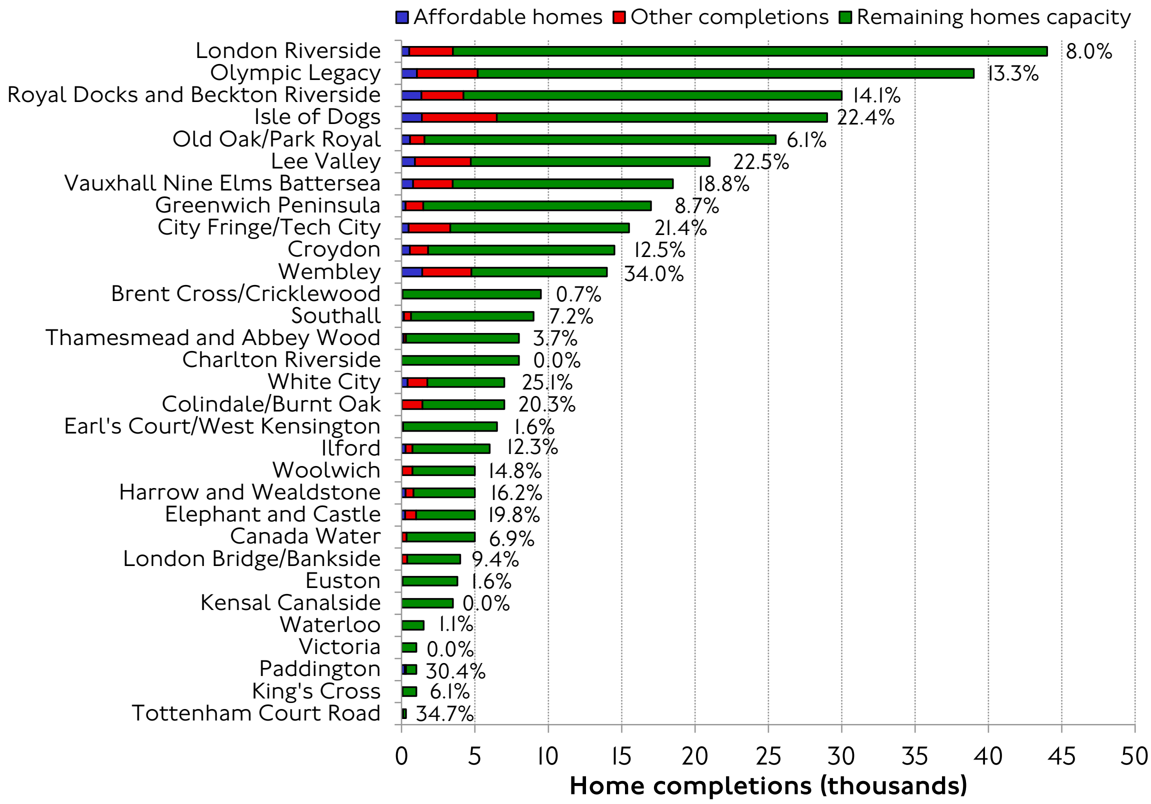
The capacity for the delivery of new housing is a defining feature of an Opportunity Area. Typically, Opportunity Areas present opportunities for high-density sustainable development on brownfield sites. TfL tracks progress of housing delivery in adopted Opportunity Areas against indicative capacities set out in the London Plan 2021.

A total of 49,369 homes have been delivered in adopted Opportunity Areas over the April 2019 to March 2022 period, which represents 14 per cent of the 2041 London Plan indicative capacity for new homes in adopted Opportunity Areas. This is in line with the rate required to deliver this by 2041. Figure 1 shows housing delivery by Opportunity Area compared to the homes capacity to 2041.

The Opportunity Areas with the highest number of homes delivered over this period are Isle of Dogs (6,494 homes), Olympic Legacy (5,188 homes), Wembley (4,753 homes), and Lee Valley (4,715 homes). The highest number of affordable homes were delivered in Wembley (1,405 homes), accounting for 30 per cent of all homes delivered in the Opportunity Area. Overall, 23 per cent of the homes delivered in Opportunity Areas between April 2019 and March 2022 were affordable, totalling 11,209 homes.

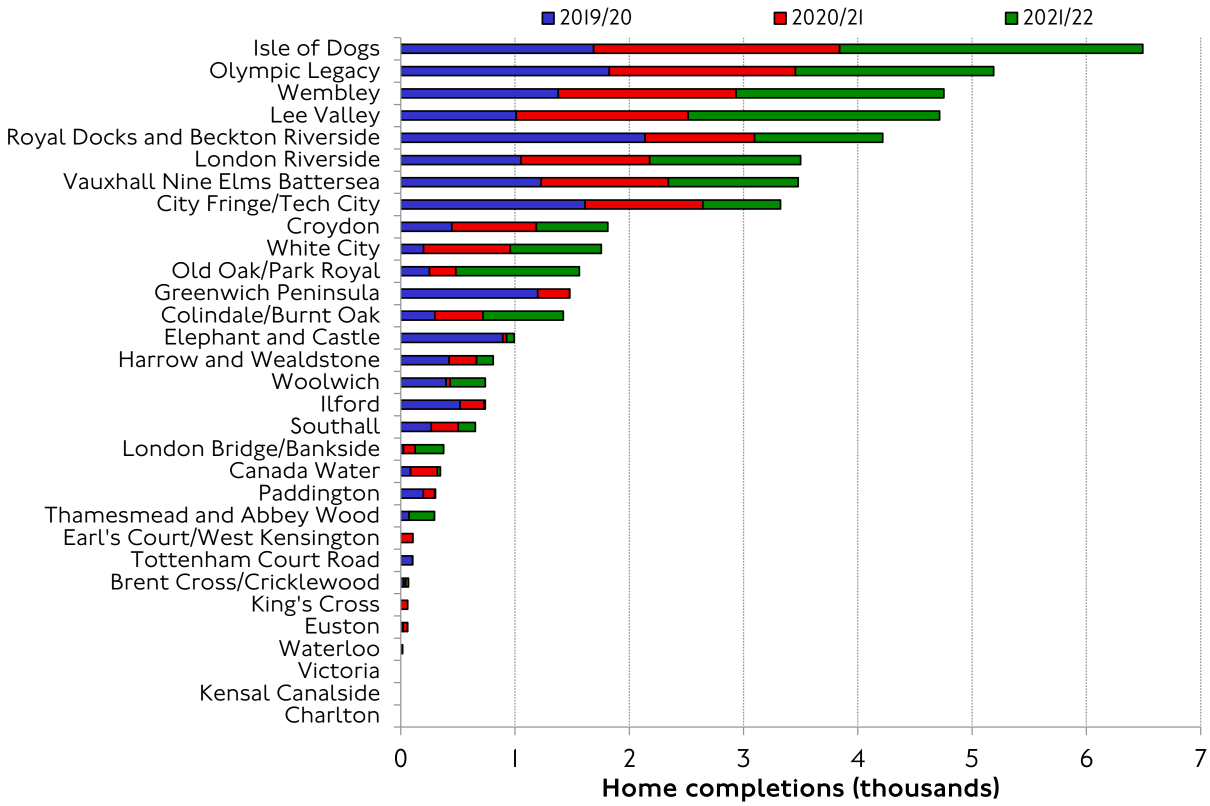
In 2021/22, 17,081 homes were completed in Opportunity Areas. Figure 2 shows the proportion of homes delivered in the three monitoring years from 2019/20 to 2021/22. In 2021/22 the most housing completions were in Isle of Dogs (2,653), followed by Lee Valley (2,201) and Wembley (1,819). The data also show the pace of delivery of homes in the Opportunity Areas - 75 per cent of the homes completed in Thamesmead and Abbey Wood over the three-year period were delivered in 2021/22. Over two thirds (69 per cent) of the homes completed in Old Oak/Park Royal between 2019/20 and 2021/22 were delivered in 2021/22.

Figure 1 Homes delivered in Opportunity Areas until 2021/22, by type, versus 2041 homes capacity.



Source: Greater London Authority.
Note: The percentages indicate the proportion of homes delivered with respect to capacity.

Figure 2 Homes delivered in Opportunity Areas by year, 2019/20-2021/22.



Source: Greater London Authority.

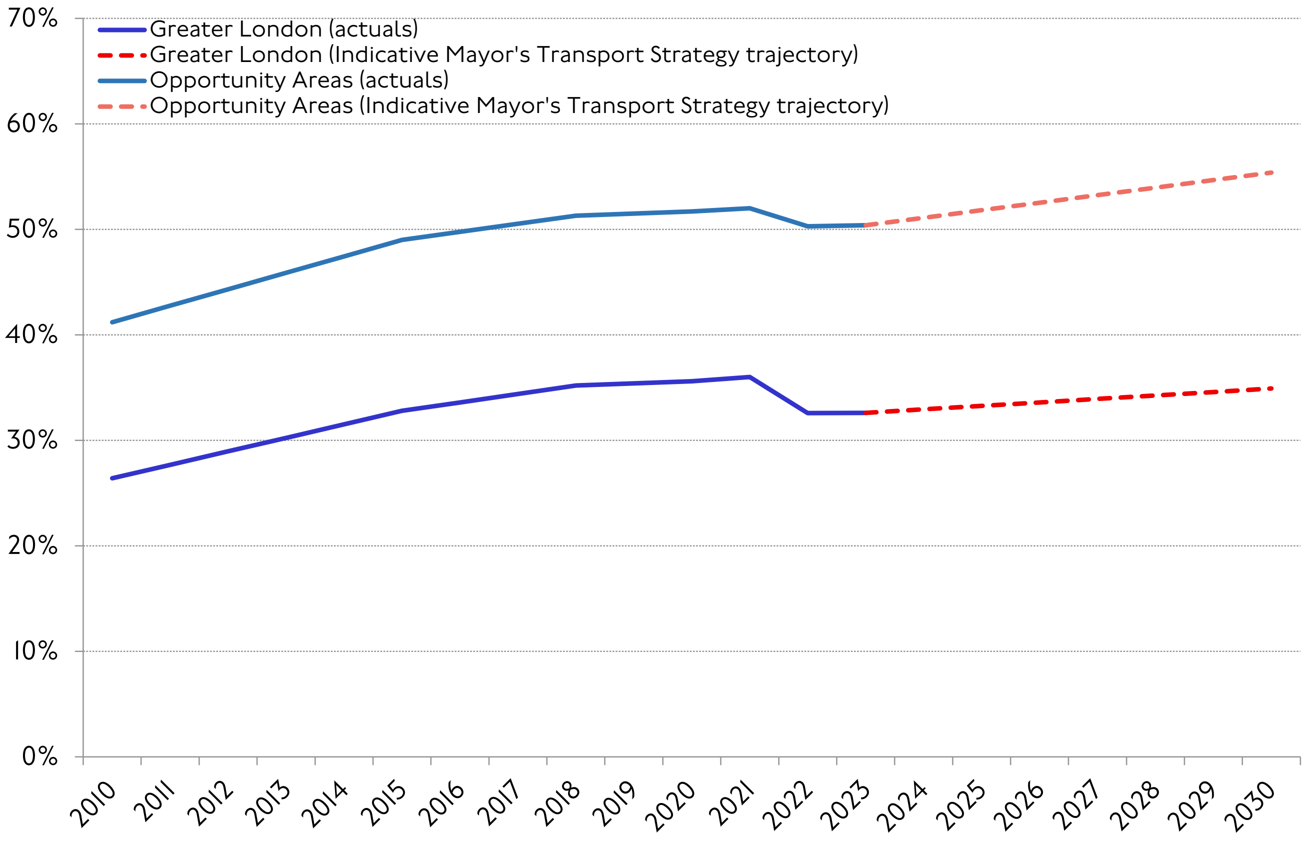
Good access to public transport

Public Transport Access Level (PTAL) in Opportunity Areas

The Mayor's ambition is to increase the number of Londoners living in areas that are well connected by public transport, as measured by Public Transport Access Level (PTAL). To monitor this, we have developed a measure of the proportion of Londoners living in areas with high PTAL (four or higher), both in Greater London and specifically in Opportunity Areas, where substantial housing growth is expected, and the principles of Good Growth should be applied to development.

Figure 3 shows that prior to 2022 the proportion of London residents and residents of Opportunity Areas living in high-PTAL areas had been steadily increasing, because of improvements to the public transport network as well as delivery of homes in well-connected locations. However, in 2022 the proportion of Londoners living in areas with a high PTAL declined, mainly due to post-pandemic timetable changes on the National Rail network and, to a lesser degree, on the bus network. This has continued into 2023, resulting in a similar proportion of Londoners living in high-PTAL areas as in 2022.

Figure 3 Proportion of the population living in areas of high (4-6) Public Transport Access Level (PTAL), London's Opportunity Areas versus Greater London, 2010-2030.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

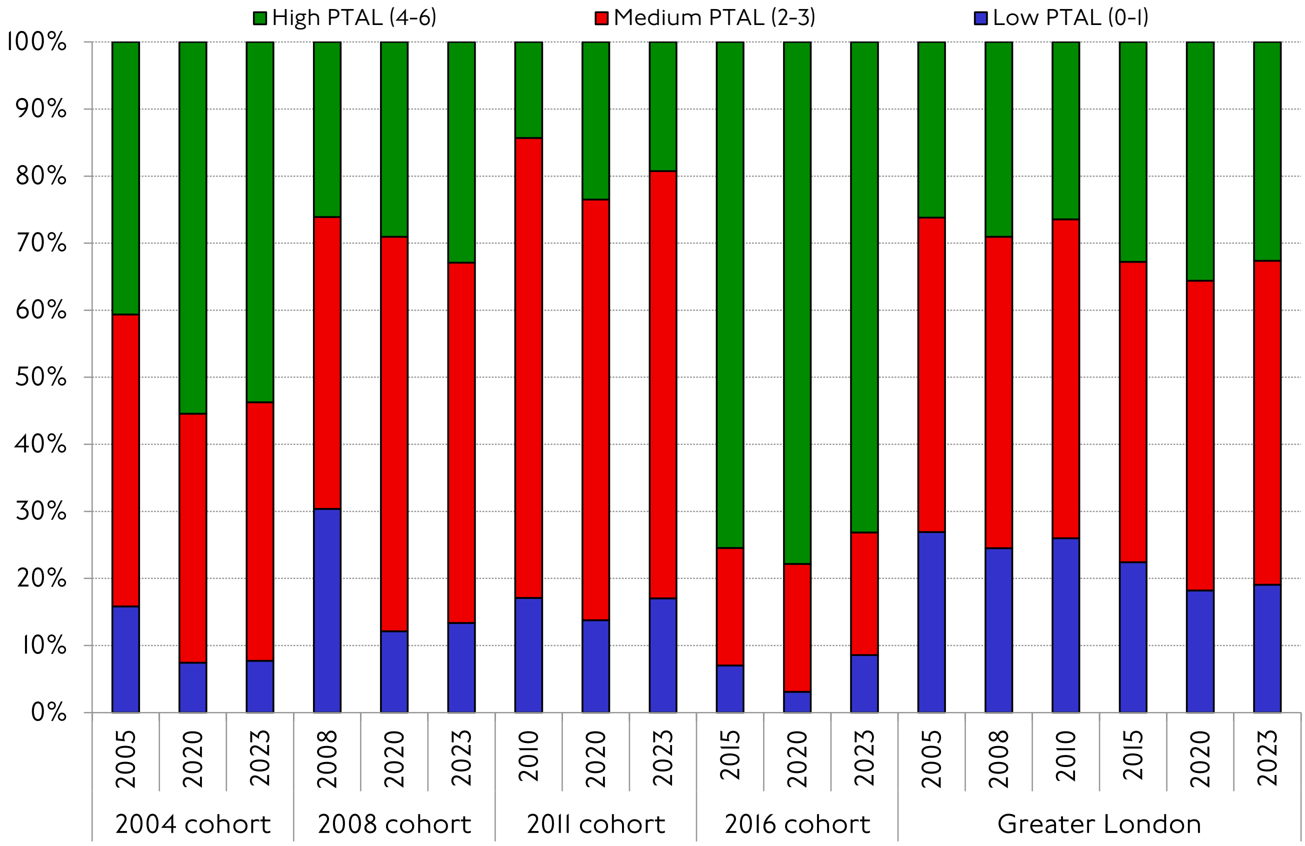
Public Transport Access Level (PTAL) by Opportunity Area cohort

Access to public transport is an important measure of Good Growth. The more connected people are to the public transport network, the more likely they are to choose public transport over car travel. Access to public transport can be improved through better public transport, walking and cycling links or by building new homes in better connected areas (for example around a London Underground station).

Traditionally TfL has measured access to public transport using the PTAL metric. The Mayor's aim is to increase the proportion of people living in high-PTAL areas within Opportunity Areas to 56 per cent by 2030.

Figure 4 shows the proportion of the population living in different PTAL categories in Opportunity Areas with adopted boundaries, aggregated across Opportunity Area cohorts grouped by the years in which they were designated. Data are presented for the respective designation years and for 2020 and 2023. The respective values for Greater London are also shown for reference. All cohorts had an increase in residents living in areas of high PTAL between the designation year and 2020, however all cohorts, apart from the 2008 cohort, have seen a fall in residents living in high-PTAL locations between 2020 and 2023. This aligns with the Londonwide trend and is largely due to a reduction in frequency of National Rail services, and some bus routes, to adapt to post-pandemic changes to travel demand.

Figure 4 Proportion of the population by Public Transport Access Level (PTAL) category, Opportunity Area cohorts versus Greater London average, 2005-2023.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

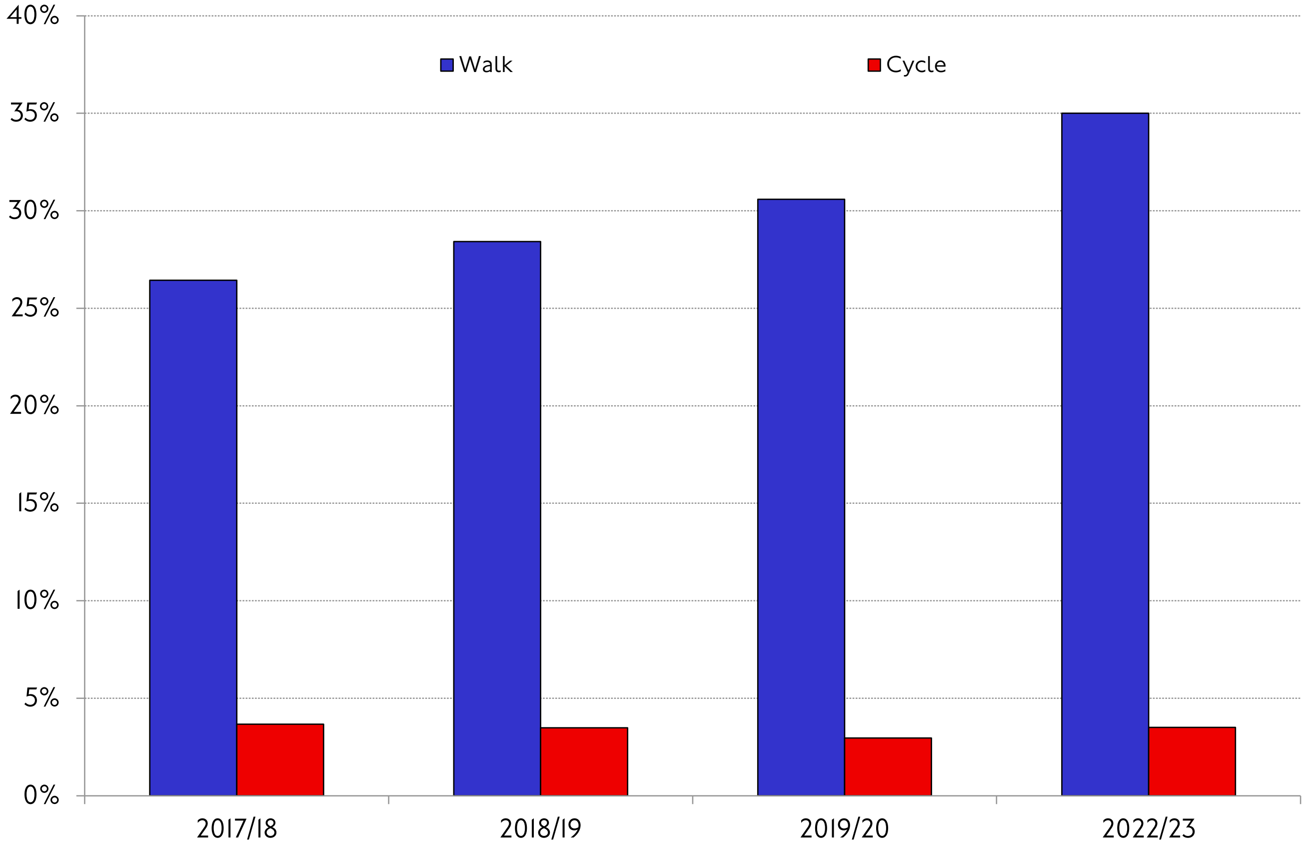
Travel by active, efficient and sustainable modes

People choose to walk and cycle

Figure 5 shows the change in walking and cycling trip-based mode shares for London resident trips with an origin or destination in an Opportunity Area. The clear upward trend in walking mode share continued in 2022/23. Between 2019/20 and 2022/23 walking mode share in the Opportunity Areas rose from 31 per cent to 35 per cent, while across Greater London the rise was from 35 per cent to 40 per cent.

The cycling mode share for Opportunity Areas had been in decline from 2017/18 to 2019/20. However, between 2019/20 and 2022/23 cycling mode share in Opportunity Areas rose from three per cent to 3.5 per cent. This is also higher than the Greater London figure of three per cent.

Figure 5 Walking and cycling mode share in Opportunity Areas, LTDS, 2017/18-2022/23.



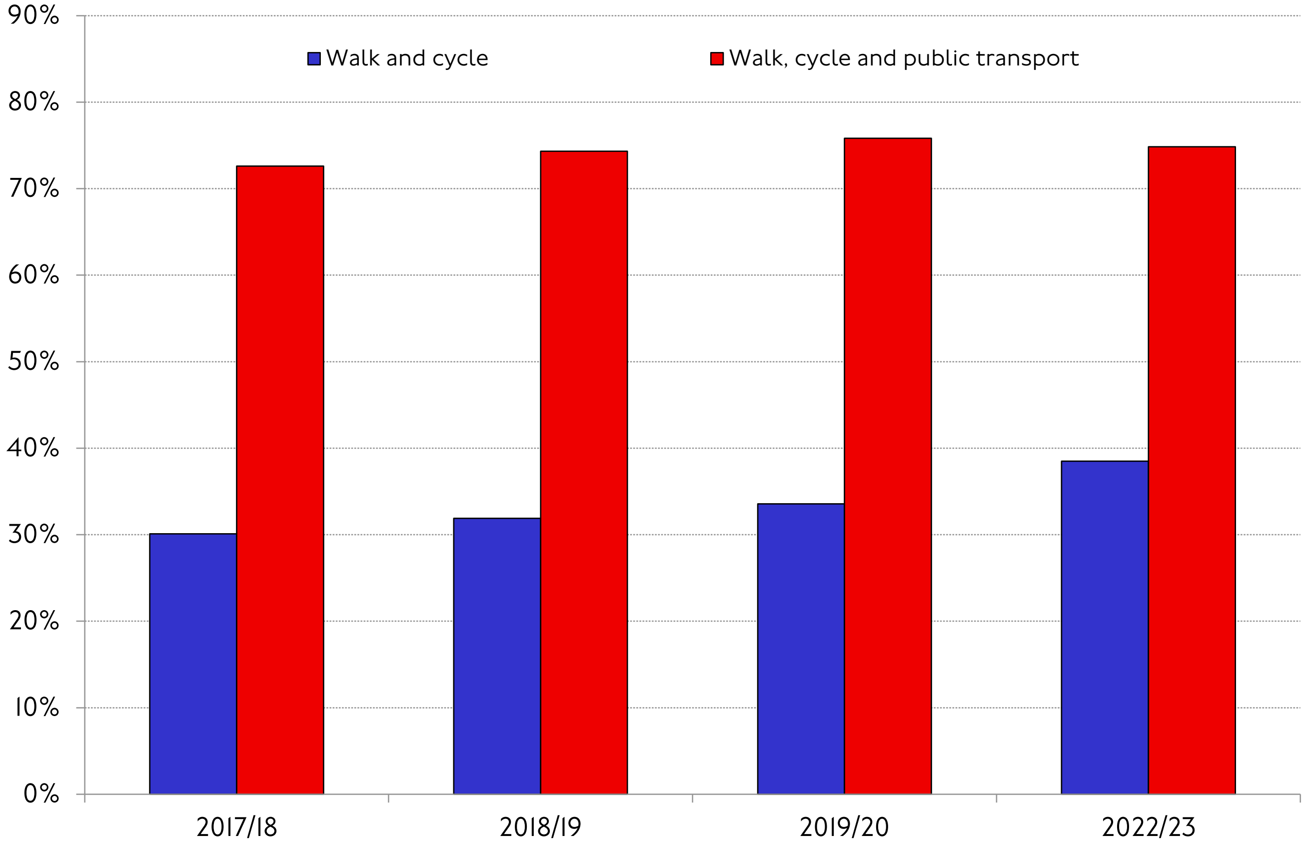
Source: TfL Strategic Analysis, Transport Strategy & Policy.

Active, efficient and sustainable mode share

The active mode share (walking and cycling) and active, efficient and sustainable mode share (also including public transport) are shown in figure 6. This shows that there has been a steady increase in the active mode share since 2017/18, and a five percentage point increase between 2019/20 and 2022/23 as a result of increased walking mode share. In 2022/23 the active mode share of trips with an origin or destination in an Opportunity Area was 39 per cent.

The trend for an increasing active, efficient and sustainable mode share in Opportunity Areas was however reversed in the 2022/23 data. In 2022/23, 75 per cent of trips were made by walking, cycling or public transport, compared to 76 per cent in 2019/20. Public transport comprised a high proportion of the mode share in pre-pandemic years, and therefore the reduction in public transport mode share at a Greater London level, due to pandemic-related changes to travel demand, is also having an impact in Opportunity Areas. Public transport mode share declined by six percentage points between 2019/20 and 2022/23 in Opportunity Areas, compared to five percentage points across Greater London.

Figure 6 Active, efficient and sustainable mode share in Opportunity Areas, LTDS, 2017/18-2022/23.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

Places for London

Previously known as TTL Properties (TTLP) Limited, Places for London is building thousands of homes across the capital. It is also one of London's largest landlords, providing workspaces for 1,500 customers, 95 per cent of which are small businesses. The company, which is wholly TfL owned, has a programme to start 20,000 homes by 2031 and is targeting half of these homes to be affordable to help transform London in line with the Mayor's Transport Strategy.

Places for London has identified dozens of sites that will deliver not only thousands of new homes, but also a range of other benefits for communities across London, including new workspaces and improved transport facilities. Over 800 homes have already been completed at sites such as Blackhorse Road. Work is now underway on a further 3,350 homes across London with thousands more to come in the years ahead. All operating profits made from recurring revenues will continue to be returned to TfL as a dividend, creating a growing long-term revenue stream that can be reinvested into the transport network. Further details of our programme can be found here.

Figure 7 Housing development at Blackhorse View.

Source: Transport for London.

Travel to the Olympic Legacy Opportunity Area

The transport legacy of the London 2012 Olympic and Paralympic Games

TfL has put in place a survey in relation to the development area associated with the London 2012 Olympic and Paralympic Games. TfL is seeking to understand progress towards the transport aspects of the Games Legacy, in their own right and in view of their role to facilitate wider social and economic development in some of London's most deprived areas. TfL's overall approach to this study was set out in [Travel in London report 6], with updates given in [Travel in London report 8] and [Travel in London report 10].

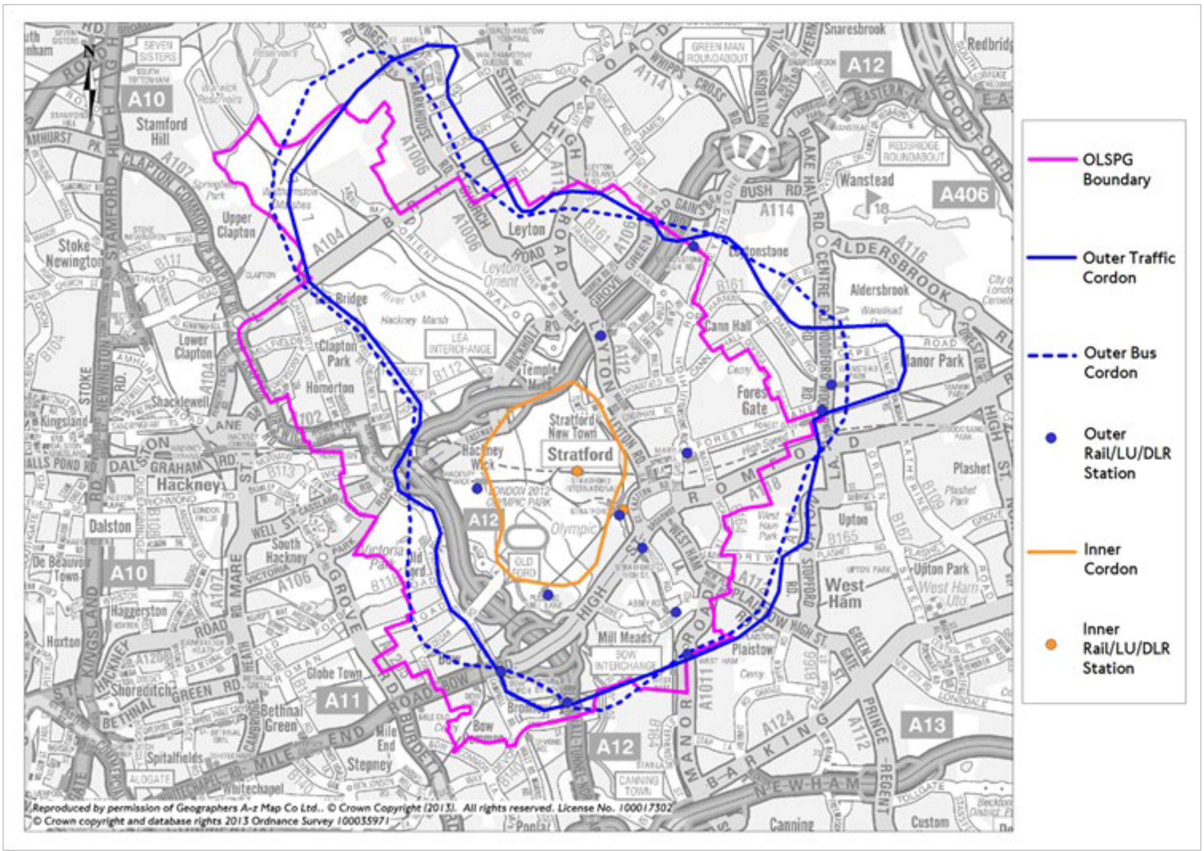
Games Legacy plans have timescales stretching 30 or more years into the future, and it is not yet possible to assess their achievement. However, the Olympic Park itself, in the immediate vicinity of Stratford, benefitted enormously from improved public transport connectivity, along with a range of improvements aimed at encouraging and facilitating walking and cycling in the run up to the Games. It is therefore useful to understand how mode share trends are evolving as commercial, residential and other development in the area comes to fruition.

The Olympic Legacy cordon survey

This is a cordon-based counting survey in which all movements crossing the relevant cordon are counted by direction. The 'outer' cordon broadly corresponds to the Olympic Legacy Supplementary Planning Guidance (OLSPG) boundary that was set out in the OLSPG in July 2012. The OLSPG explains that this area has the potential to provide 32,000 new homes and 1.35 million square metres of new and improved commercial floor space over the legacy period, thus generating a substantial number of additional trips. The 'inner' cordon tightly encloses the Queen Elizabeth Olympic Park itself, which is currently undergoing conversion to a high-quality sporting and leisure destination. It also encloses the Stratford City complex, including the Westfield Stratford City shopping centre.

Figure 8 shows the extent and location of these two cordons. The outer cordon roughly traces the OLSPG boundary and enables enumeration of all people movements in and out by road vehicle. It is counted between 06:00 and 20:00. As passengers can typically only board and alight buses at designated bus stops, a modified cordon was defined for counting bus passengers. It was not possible to count pedestrians at this cordon, due to the length of the cordon. In addition, the 13 National Rail, London Underground, London Overground and DLR stations inside the cordon were surveyed to estimate people movements crossing the cordon by rail modes. Rail data was collected from several TfL sources, including DUNNART, rail passenger flow data on boarding trains and through stations and TAPS station gate line data. This data covers the period 07:00 to 19:00. Baseline surveys were conducted in spring 2013, the first year after the Games, and representing 'neutral' traffic and travel demand conditions. The survey was repeated in 2015 and 2023 to track changes and developments in the Olympic Legacy area.

Figure 8 Olympic Legacy area counting cordons.

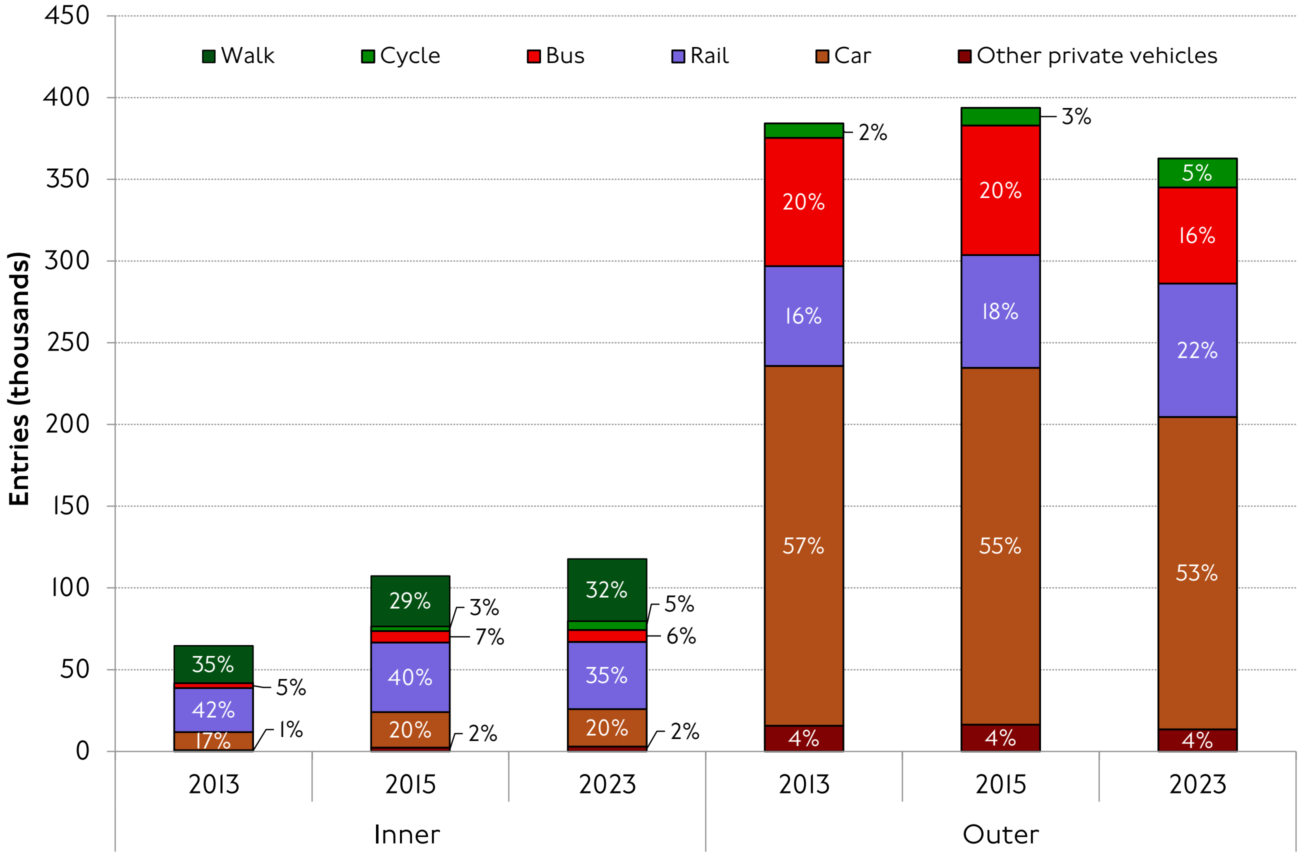


Source: TfL Strategic Analysis, Transport Strategy & Policy.

The cordon accounts for all people entering or leaving the area, excluding those making wholly through trips (and not interacting with the area), for example international passengers on High Speed One or travellers making 'through trips' on the Central line (for example, Holborn to Epping). Persons in road vehicles making 'through' trips would however be counted on entering the cordon and counted again a short time later upon exiting it.

The inner cordon surrounding the Olympic Park adopts a similar methodology, although Stratford station partly straddles the inner cordon. This means that people exiting the station to Stratford City enter the inner cordon, whilst those exiting via the main ticket hall and bus station do not enter the inner cordon but enter the area defined by the outer cordon.

Figure 9 Trips entering the counting cordons surrounding the Olympic Legacy Opportunity Area and mode shares, 2013-2023.



Source: TfL Strategic Analysis, Transport Strategy & Policy.
Note: The inner cordon tightly encloses the Queen Elizabeth Olympic Park itself, including the Stratford City complex, Stratford station and Westfield Stratford City shopping centre. The outer cordon roughly traces the Olympic Legacy Supplementary Planning Guidance boundary and enables enumeration of all people movements in and out by road vehicle. Both were counted 06:00-20:00 on a typical weekday.

Figure 9 summarises the results from the Spring 2023 count, against previous counts at the same set of cordons. At the inner cordon, there has been a steady increase in the number of trips, with a growth of 82 per cent between 2013 and 2023, with 10 per cent growth between 2015 and 2023, equating to 117,700 trips in 2023. The percentage of these trips made by active, efficient and sustainable modes was 78 per cent in 2023, the same as in 2015, both being a slight reduction from the 82 per cent recorded in 2013.

At the outer cordon, the trend in total travel is less clear, with fluctuations across the three counting years. Total inbound trips (this cordon does not count walking trips) in 2023 were 362,700, compared to 393,800 in 2015 and 384,300 in 2013. Private car accounts for over half of all trips, this accounting for 53 per cent of all inbound trips in 2023, compared to 55 per cent in 2015 and 57 per cent in 2013. The absolute number of car trips has also decreased, by some 29,000 between 2013 and 2023, a reduction of 13 per cent. A feature of the 2023 data is a reduction in bus trips, from 20 per cent of trips in 2015 to 16 per cent in 2023, though this is in line with a 25 per cent decline in Londonwide bus trips between 2013/14 and 2022/23. Noteworthy has been the growth in cycle trips, from 8,890 in 2013 (two per cent of all inbound trips) to 17,709 in 2023 (five per cent of all inbound trips).

Totals and mode shares

Tables 1 and 2 compare the inbound volumes across the inner and outer cordons surrounding the Olympic Legacy Opportunity Area by mode for the three survey periods and highlighting the difference between 2015 and 2023.

Table 1 People (thousands) entering the inner cordon surrounding the Olympic Legacy Opportunity Area between 07:00 and 19:00, 2013-2023.

Mode	2013	2015	2023	Change from 2015 to 2023
Walk	20.8	28.0	34.5	+23%
London Underground and DLR	15.1	22.5	25.8	+14%
National Rail	11.8	15.2	11.4	-25%
Car	9.6	18.9	20.2	+7%
Bus	2.7	6.5	6.6	+2%
Goods vehicle	1.4	3.3	3.1	-5%
Coach/minibus	0.4	1.7	1.2	-29%
Cycle	0.2	2.4	4.9	+101%
Taxi	0.2	0.3	0.1	-63%
Two-wheeled motor vehicle	0.1	0.3	0.9	+203%
All modes	62.3	99.2	108.7	+10%

Source: TfL Strategic Analysis, Transport Strategy & Policy.

At the inner cordon, there has been an overall increase in the number of people entering the cordon, with a 10 per cent rise between 2015 and 2023, however this varies by mode. Between 2015 and 2023 there was a 14 per cent increase in London Underground and DLR volumes and a two per cent increase in bus, while National Rail has seen a 25 per cent reduction. However, it should be noted that this compares to a 31 per cent increase in National Rail entries in the outer cordon (see table 2 below), which may suggest a change in the travel destinations upon alighting from National Rail services or changes in the recording methodology. The proportion of trips made by active modes saw a 29 per cent increase in volume between 2015 and 2023, continuing the significant increase recorded between 2013 and 2015.

Table 2 People (thousands) entering the outer cordon surrounding the Olympic Legacy Opportunity Area between 07:00 and 19:00, 2013-2023.

Mode	2013	2015	2023	Change from 2015 to 2023
Car	191.4	188.5	166.5	-12%
Bus	69.8	70.0	52.5	-25%
Goods vehicle	58.0	54.9	47.6	-13%
London Underground and DLR	40.5	39.6	45.7	+15%
National Rail	20.6	20.6	26.9	+31%
Coach/minibus	7.9	7.6	3.6	-53%
Cycle	7.7	9.4	15.4	+63%
Two-wheeled motor vehicle	5.1	5.6	7.2	+28%
Taxi	1.1	1.0	0.9	-7%
Walk	n/a	n/a	n/a	n/a
All modes	402.1	397.2	366.3	-8%

Source: TfL Strategic Analysis, Transport Strategy & Policy.

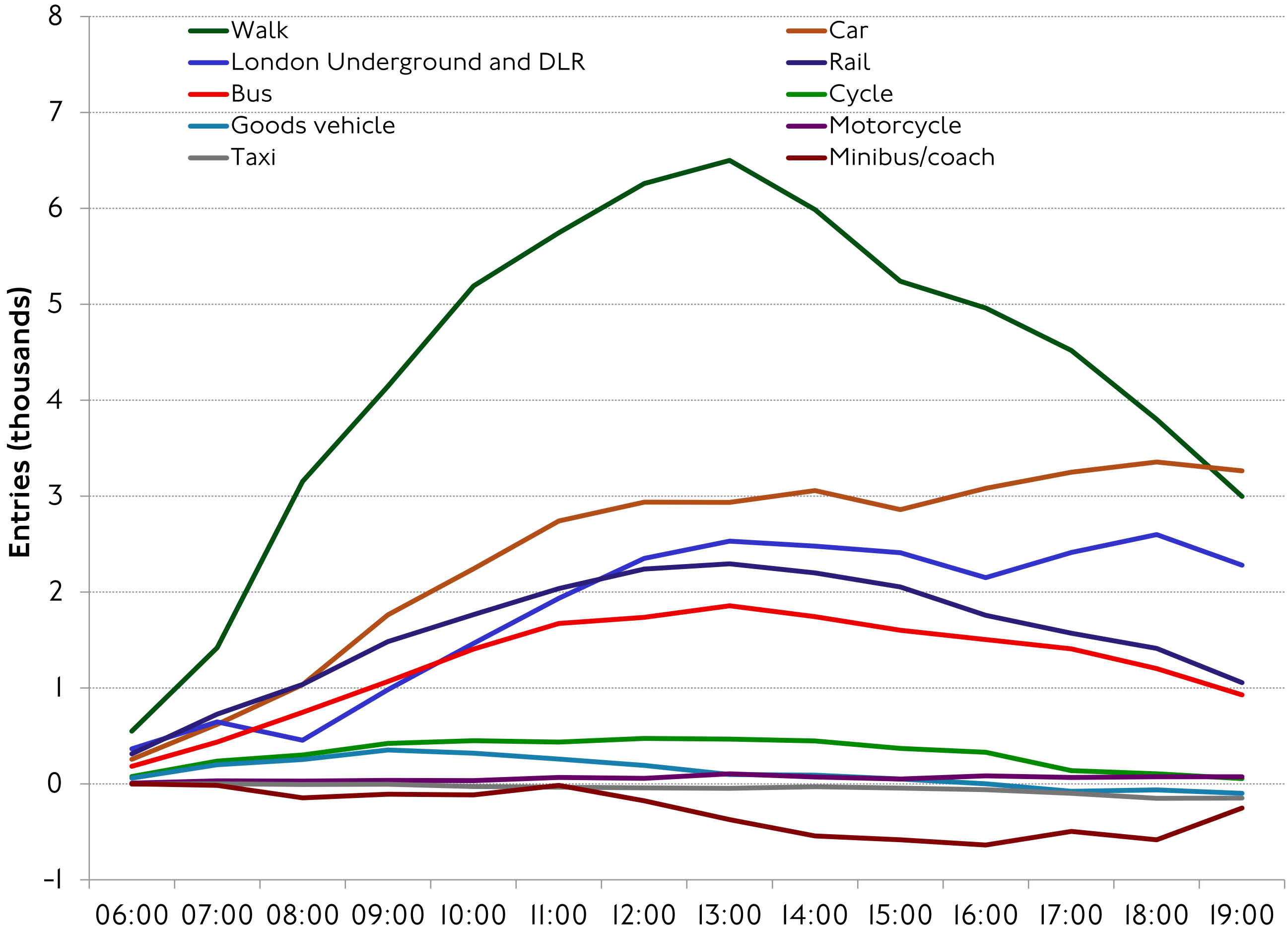
At the outer cordon, there has been an overall decrease in the number of people entering the cordon, with an eight per cent reduction between 2015 and 2023, however this varies by mode. Between 2015 and 2023 London Underground and DLR volumes increased by 15 per cent and National Rail by 31 per cent, while entries by bus saw a reduction of 25 per cent. For context, across London bus journeys in 2022/23 were around 25 per cent lower than in 2013/14.

The number of trips made by cycle saw a 63 per cent increase in volume in 2023 compared to 2015, maintaining the trend seen between 2013 and 2015 both within the outer cordon and in London as a whole.

Cumulative net inflows

A useful way to look at the cordon volumes is to present the data as the cumulative net totals (inbound minus outbound movements). In an idealised case, inbound should equal outbound over the course of a 24-hour day. Figures 10 and 11 show however that, at least for the hours surveyed by these cordons, this is not the case. Figure 10 demonstrates the strong attraction of the land uses within the inner cordon (predominantly Westfield shopping centre and the Stratford transport hub). Most modes show a consistent increase in net inbound flows throughout the morning, peaking at lunchtime. This falls in the afternoon for several modes as people begin to leave the area, but then rises again in the late afternoon. This suggests the existence of a second wave of visitors, most likely shoppers visiting Westfield Stratford City after work and people attending events at the stadium or other evening entertainment venues. At the end of survey hours (20:00), there are over 8,000 extra people within the cordon compared to early morning. These will dissipate over the later evening hours (not surveyed) as attractions close. The net outbound flow by London Underground and DLR between 08:00 and 09:00 may be indicative of interchange between High Speed One at Stratford International and other services from Stratford station.

Figure 10 Cumulative net entries to the inner cordon surrounding the Olympic Legacy Opportunity area, by hour and mode, 2023.

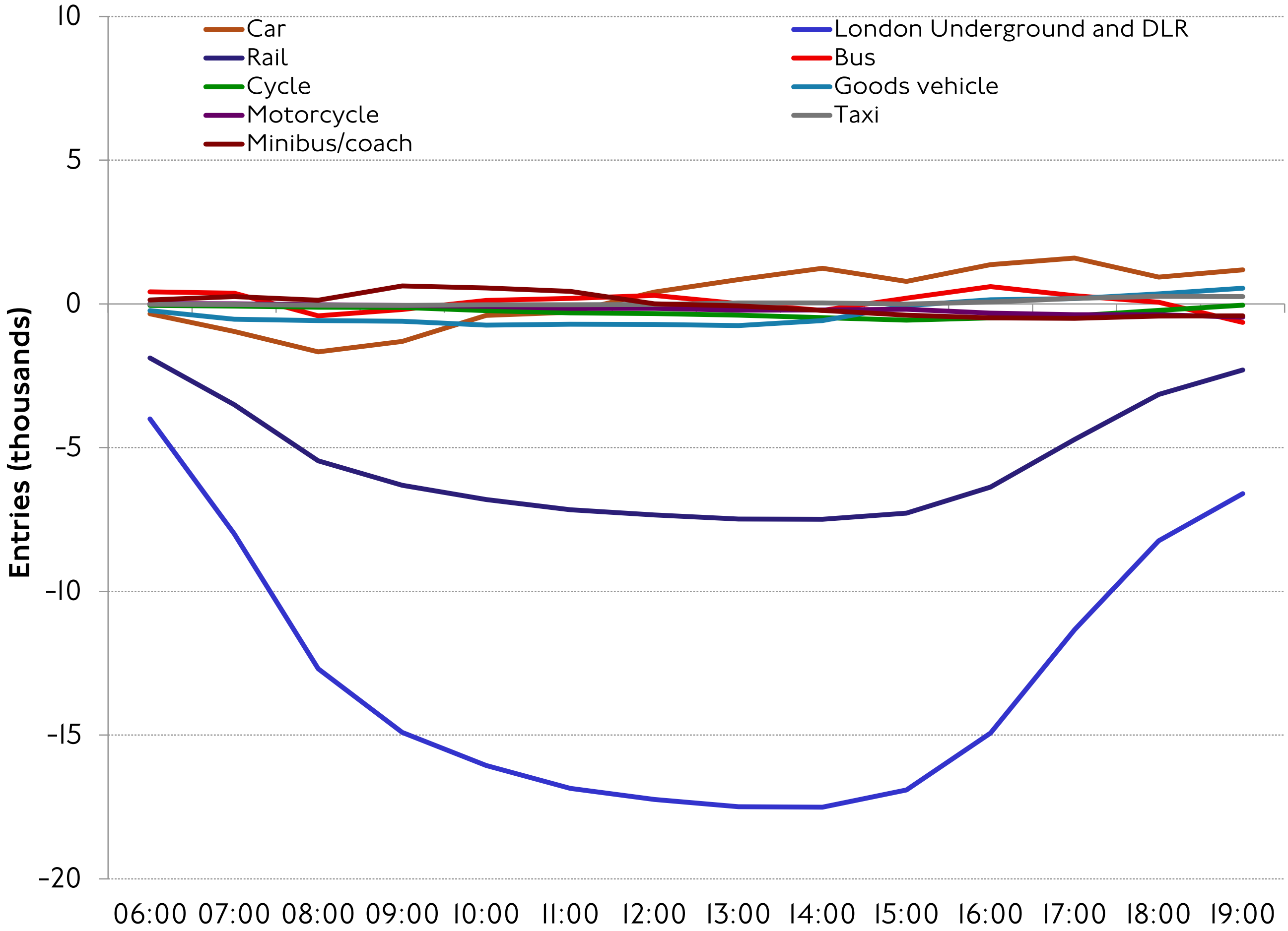


Source: TfL Strategic Analysis, Transport Strategy & Policy.

In contrast to the inner cordon, the area enclosed within the outer cordon is predominately residential. This is reflected by the rapid outflow of people by public transport in the morning peak and the gradual inflow from about 15:00 onwards (figure 11). This pattern is matched (albeit on a much smaller scale) for cycles. The pattern for cars is more mixed. This can be partly attributed to people transiting the cordon on key radial routes rather than having an origin or destination within it.

In contrast to the inner cordon, at the end of survey hours the outer cordon shows a 'deficit' of people – in the region of 2,500 or so, mostly London Underground or DLR passengers. In this case, people commuting by rail and other modes out of the area in the morning have yet to return – they will likewise return progressively after survey hours. Given that the outer cordon wholly contains the inner cordon, the relative 'deficit' at the outer cordon at the end of survey hours will be (largely, but not in the case of residents within the outer cordon) net of the relative 'excess' at the inner – meaning that the 'true' shortfall of people for the outer cordon would be rather larger than implied by figure 11.

Figure 11 Cumulative net entries to the outer cordon surrounding the Olympic Legacy Opportunity Area, by hour and mode, 2023.



Source: TfL Strategic Analysis, Transport Strategy & Policy.

Mode shares of London resident trips originating in the Olympic Growth boroughs

It is possible to extend this analysis by looking specifically at the active, efficient and sustainable mode share, by either Growth borough residents or, as in this case, by all residents of Greater London making trips that originate in the Growth boroughs (table 3). This is a potentially interesting perspective, as it should ultimately be possible to understand the extent to which travel behaviour change is specifically a feature of people who live and travel in the Growth boroughs or is reflective more generally of London residents. The Olympic Growth boroughs include Barking & Dagenham, Greenwich, Hackney, Newham, Tower Hamlets and Waltham Forest.

Table 3 Active, efficient and sustainable mode share of trips by London residents originating in each of the Olympic Growth boroughs, LTDS, 2006/07-2022/23.

Borough/area	2006/07-2010/11 5-year average	2013/14-2014/15 2-year average	2015/16-2016/17 2-year average	2022/23
Barking & Dagenham	56%	49%	55%	54%
Greenwich	56%	58%	60%	63%
Hackney	79%	78%	82%	87%
Newham	72%	72%	71%	70%
Tower Hamlets	80%	80%	82%	85%
Waltham Forest	59%	60%	60%	73%
Olympic Growth boroughs total	68%	68%	70%	74%
'Geographic' comparison	64%	65%	66%	69%
'Most similar' comparison	67%	67%	67%	72%
Non-Olympic Growth boroughs	62%	62%	62%	67%
Inner London	78%	78%	78%	81%
Outer London	51%	51%	51%	57%
Greater London	63%	63%	64%	69%

Source: TfL Strategic Analysis, Transport Strategy & Policy.
Note: 'Geographic' comparison refers to a control group of six 'mirror image' contiguous boroughs in south and west London (Hammersmith, Lambeth, Wandsworth, Merton, Sutton and Kingston). 'Most similar' comparison refers to a set of six non-contiguous boroughs identified as being most similar across a range of sociodemographic variables to the Growth boroughs (Enfield, Haringey, Islington, Southwark, Lewisham and Hounslow).

The general trend in the active, efficient and sustainable mode share of trips originating in the Growth boroughs has been either stable or upward over the four time periods. In the latest available year (2022/23), the active, efficient and sustainable mode share of trips originating in Hackney, Newham, Tower Hamlets and Waltham Forest was higher than the Greater London average, whereas trips originating in Barking & Dagenham, and Greenwich were lower than the Greater London average.

The active, efficient and sustainable mode share of the Growth boroughs overall has increased from 68 per cent in the first two time periods to 74 per cent in the latest year, five percentage points higher than the Greater London average. This compares to 67 per cent for the non-Olympic Growth boroughs, which is two percentage points lower than the Greater London average.

This suggests that there has been a positive long-lasting effect of the London Olympics on the active, efficient and sustainable mode share of trips originating in Growth boroughs.