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WPA | **CPA**
Westminster Property Association | City Property Association

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Acknowledgements

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Foreword

It is striking to see the volume of space, embodied carbon and cost associated with vacant cycle parking provision in office buildings designed to the current London Plan (2021) requirements. As an industry, we are often recognised as global leaders in decarbonising real estate, but building over-sized basements to house empty cycle racks is somewhat of an own goal, especially when viability is constrained.

The findings of the CPA's *Cycling & the City* report¹, published in 2024, surprised many policymakers and industry peers. A well-intentioned policy designed to support sustainable travel before the dawn of multiple cycle hire schemes, combined with a world-leading public transport network, has led to vast amounts of unused cycle parking spaces in London's office buildings. The embodied carbon within this vacant space is substantial, the capital costs are huge and the impact on viability is significant.

Spurred on by these findings, we have assembled the most comprehensive evidence base to date, drawing on data from office buildings across the City of London, Westminster, Camden, Islington, Southwark and Tower Hamlets, including Canary Wharf. Together, these buildings provide a clear picture of cycle parking demand and provision across London's Central Activities Zone (CAZ) and Northern Isle of Dogs (NIOD).

Across one million square metres of commercial development, actual employee density and cycle parking demand remain substantially below current planning policy assumptions. Lower employee density is not a reflection of weaker office demand or fewer people working in offices. Employment and workplace activity in central London remain strong, with City worker numbers estimated to be around 25% higher than before the pandemic.

Rather, occupiers are allocating more space per employee to support collaboration, wellbeing and workplace amenities, meaning more space is provided per employee than under historic assumption, reducing the link between employee density and demand for long-stay cycle storage.

The analysis finds that where buildings are designed to current London Plan standards, **on average 84% of cycle spaces would remain unused**. This is not just an issue for towers, although the scale of basement provision in these buildings increases viability challenges; the study includes a wide range of office typologies and demonstrates that the pattern of over-provision exists across the entire office market.

Several factors help explain the misalignment of policy and actual use. Central London benefits from an exceptional public transport network and, since the standards were introduced, has seen rapid growth in cycle hire, e-bikes and other mobility options. Together, these changes have left cycle parking demand well below the assumptions underpinning current policy.

The London Property Alliance has produced this evidence backed analysis to help inform future policy and we hope it will be factored into a move towards standards derived from net internal area (NIA), more accurately reflecting the space used by office workers, alongside real employee density and an appropriate cycle mode share target. This is critical to ensuring planning policy is aligned with real-world demand, supporting economic growth while enabling the development sector to continue delivering lower-carbon, high-quality workplaces across central London.



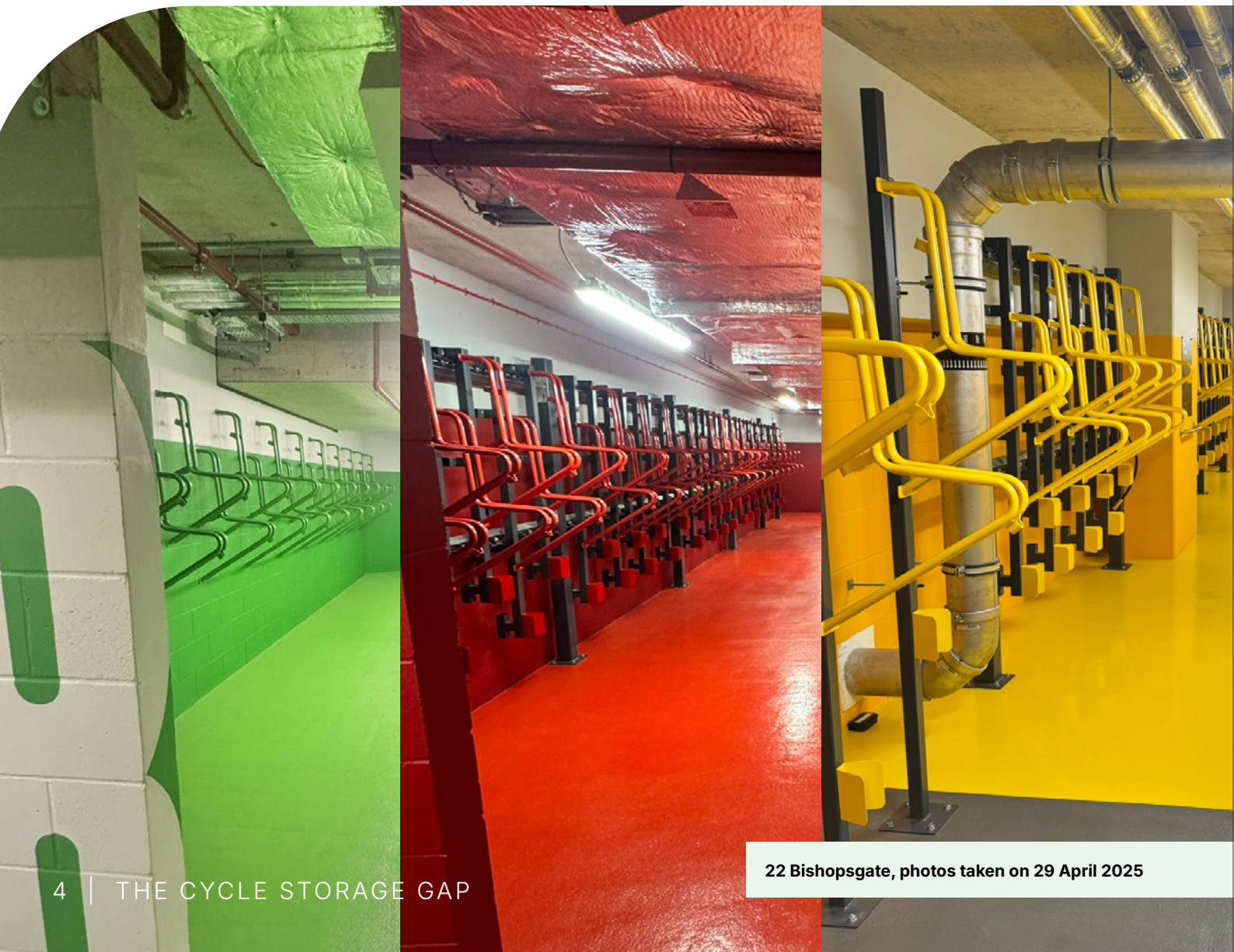
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Building	Typical Mid-Week Employee Density	Number of Cycle Spaces	Occupied Cycle Spaces	Occupied Office GEA (sqm) per Bike	Percentage occupation of cycle parking spaces	Cycle Spaces Occupied (Adjusted to 2021 London Plan)	Cycle Mode Share
Average total	19sqm NIA 28sqm GEA	8,948	2,108	433	24%	16%	6.5%

1: City Property Association, *Cycling & the City*, December 2024

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Introduction

London's CAZ is the UK's economic engine. It generates approximately £315 billion in annual GVA, over 10% of national output², and brings together businesses, talent and investment at scale. London's leading sectors depend on access to modern, high-quality workspace if they are to compete internationally. Office-based sectors support around 2.8 million jobs across Greater London and generate almost £290 billion of annual economic output³. **Offices in the CAZ are not simply buildings, they are critical economic infrastructure.** Maintaining the CAZ's competitiveness requires planning policies that support sustainable growth and the efficient delivery of new workspace.

Cycling is an important component of London's transport network, and high-quality cycle facilities are now a standard feature of modern office development. **To encourage cycling, successive London Plans have introduced increasingly ambitious cycle parking requirements, with office developments in London currently required to provide one long-stay cycle parking space per 75 sqm GEA⁴.**

The CPA's *Cycling & the City* report, published in 2024, examined whether current cycle parking requirements align with demand. Drawing on evidence from over 600,000 sqm GEA of prime office accommodation in the City, the study identified a significant mismatch between policy assumptions and actual use. It found an average cycle mode share of 6%, compared with the 19% mode share assumed by the London Plan's office cycle parking standards.

As a result, large quantities of cycle parking remained unused, despite being provided in some of the City's most modern office buildings and supported by high-quality end-of-trip facilities.

2: London Property Alliance, Space for Change: Office space dynamics in central London, December 2025
3: Ibid.
4: Greater London Authority, The London Plan 2021, March 2021
5: London Property Alliance, Space for Change: Office space dynamics in central London, December 2025

This report builds on that work by expanding the evidence base across London's wider CAZ. New surveys undertaken in the City of London, Westminster and additional central London office locations provide **the first CAZ-wide assessment of cycle parking utilisation in modern office buildings.**

The research focused on modern office developments and adjusted the findings to reflect the 2021 London Plan standards where required, ensuring the results provide a robust comparison between policy requirements and real-world demand.

The findings have important implications for the delivery of new workspace. **Cycle parking is often accommodated within basement space, one of the most carbon-intensive and costly elements of a building to construct.** At a time when the delivery of office space in central London is constrained⁵ - undermining the UK's capacity for economic growth - and pressures on scheme viability are increasing, planning policies should ensure that cycle parking requirements reflect real demand with sensible allowances for future growth.

The publication of **the Mayor's new Draft London Plan (2026) represents a welcome step forward.** Proposed changes include a move away from floorspace-based calculations towards a staff-based approach, together with greater flexibility where full provision would require additional basement construction or result in a disproportionate loss of lettable floorspace. These proposals reflect many of the issues identified through both *Cycling & the City* and this updated CAZ-wide research.

This paper contributes further evidence to London Property Alliance's engagement with the GLA on the Draft London Plan and supports the development of a more proportionate and evidence-led approach to cycle parking provision across central London.



Office Buildings Surveyed

Central London

- 1. 20 Triton Street (Camden)
- 2. 80 Charlotte Street (Camden)
- 3. The Featherstone Building (Islington)
- 4. Aldgate Tower (Tower Hamlets)
- 5. The Arbor (Southwark)
- 6. 20 Water Street (Tower Hamlets - Canary Wharf)

City of London

- 7. 70 St Mary Axe
- 8. 60 London Wall
- 9. 100 Liverpool Street
- 10. 22 Bishopsgate
- 11. 100 Bishopsgate
- 12. Citypoint
- 13. 80 Fenchurch Street
- 14. 1 Finsbury Avenue

West End

- 15. One Soho Place
- 16. 18 Hanover Square
- 17. Nova North
- 18. Nova South
- 19. Nova N2
- 20. Zig Zag
- 21. 123 Victoria Street

Central London

Bringing together surveys undertaken across the City of London, West End and additional CAZ and NIOD locations, the combined dataset covers more than one million sqm GEA of commercial development, over 30,000 employees and includes 8,948 cycle parking spaces. It provides the most comprehensive assessment of cycle parking utilisation across central London's office market to date.

Across the sample, average employee density was recorded at **one employee per 19 sqm NIA or one employee per 28 sqm GEA**, remaining substantially below the assumptions historically used to inform cycle parking standards.

Of the **8,948 cycle parking spaces surveyed, only 2,108 were occupied, representing a utilisation rate of 24%.**

When adjusted against the current London Plan standard of one long-stay cycle parking space per 75 sqm GEA, observed use was equivalent to just 16% of required provision. This indicates that approximately **84% of cycle parking spaces generated by the current standard would have remained unused.** Across the combined sample, private cycle use equated to an **approximate cycle mode share of 7%, substantially below the 19% mode share assumption** underpinning the current London Plan standard.

Building	Typical Mid-Week Employee Density	Number of Cycle Spaces	Occupied Cycle Spaces	Occupied Office GEA (sqm) per Bike	Percentage occupation of cycle parking spaces	Cycle Spaces Occupied (Adjusted to 2021 London Plan)	Cycle Mode Share
Average total	19sqm NIA 28sqm GEA	8,948	2,108	433	24%	16%	6.5%

84%

of cycle spaces
were vacant

(Adjusted to 2021 London Plan)

19 sqm

NIA average office
space per employee

7%

average cycle
mode share

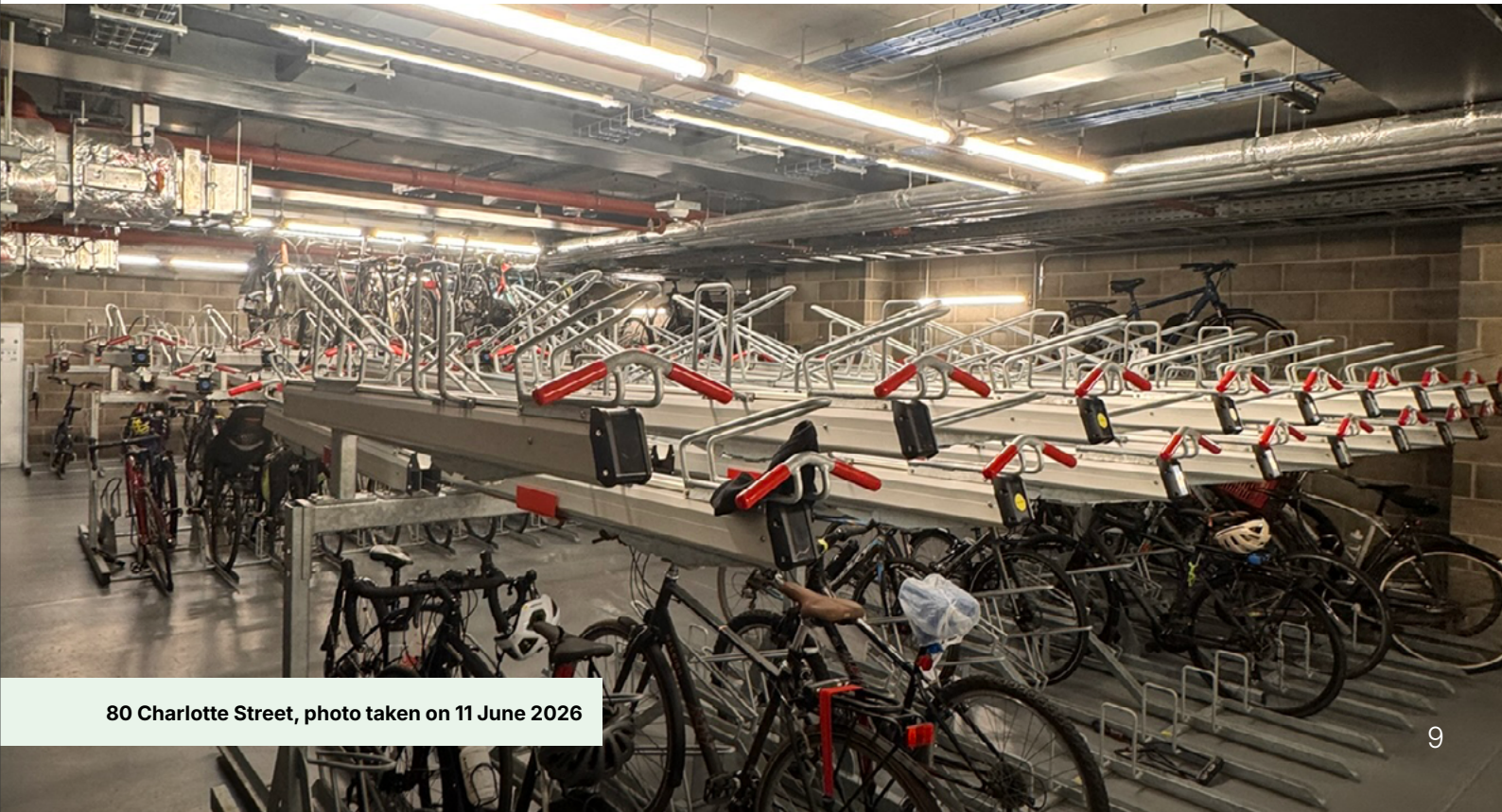
Employee density and cycle parking utilisation varied little between locations, suggesting that the findings are representative of modern office buildings across central London rather than a particular sub-market or geography. The consistency of results across the City of London, West End and wider CAZ and NIOD sample suggests that lower employee densities are now an established feature of the modern office market. Working patterns, increased provision of collaboration space and growing demand for workplace amenities have reduced employee density of occupied floorspace relative to historic assumptions.

Importantly, these findings cannot be attributed to poor-quality facilities. The surveyed buildings provide extensive end-of-trip provision, including showers, lockers, maintenance facilities and drying rooms. Building managers reported no issues relating to insufficient cycle parking, shower or locker capacity.

The surveys demonstrate that current cycle parking standards are driven by assumptions that do not correlate with real employee density and actual private cycling mode share. The evidence shows that excessive quantities of cycle parking have been delivered and remain unused, resulting in inefficient use of valuable floorspace and generating significantly higher volumes of embodied carbon through the construction of deeper basements than necessary. The surveys demonstrate that a more proportionate approach to long-stay cycle parking provision is required, which reflects actual working patterns and evolving commuter mode share.



The Arbor, photo taken on 18 June 2026



80 Charlotte Street, photo taken on 11 June 2026

Building on the original *Cycling & the City* study, we resurveyed almost 600,000 sqm GEA of prime office floorspace in the City of London, **accommodating nearly 17,500 employees and more than 5,300 cycle spaces**, to provide a robust picture of cycle parking usage. Surveyed buildings included 70 St Mary Axe, 100 Liverpool Street, 22 Bishopsgate, 100 Bishopsgate, Citypoint, 80 Fenchurch Street and 1 Finsbury Avenue. Cycle parking utilisation was assessed during peak midweek periods across spring and summer 2025.

The findings continue to demonstrate a significant gap between current planning assumptions and actual employee density. **Average density was recorded at one employee per 30 sqm GEA, equivalent to one employee per 21 sqm NIA,**

with spring surveys producing a near-identical result of one employee per 20 sqm NIA. These figures remain substantially below the employee density assumptions used to inform the 2021 London Plan cycle parking standard, namely one employee per 12 sqm GEA, equivalent to approximately one employee per eight sqm NIA.

On average, **78% of cycle parking spaces were vacant during peak periods.** Modelling undertaken as part of the study indicates that, had all surveyed developments been designed to current London Plan requirements, approximately **86% of spaces would have remained vacant.** In practical terms, **cycle parking was occupied at a rate of one bike per 508 sqm of office floorspace, compared with the current policy requirement of one space per 75 sqm.**

Spring 2025

Building	Typical Mid-Week Employee Density	Number of Cycle Spaces	Occupied Cycle Spaces	Occupied Office GEA (sqm) per Bike	Percentage occupation of cycle parking spaces	Cycle Spaces Occupied (Adjusted to 2021 London Plan)	Cycle Mode Share
Average total	20sqm NIA 29sqm GEA	4,898	1,126	493	23%	14%	6%

Summer 2025

Building	Typical Mid-Week Employee Density	Number of Cycle Spaces	Occupied Cycle Spaces	Occupied Office GEA (sqm) per Bike	Percentage occupation of cycle parking spaces	Cycle Spaces Occupied (Adjusted to 2021 London Plan)	Cycle Mode Share
Average total	21sqm NIA 30 sqm GEA	5,318	1,132	508	21%	14%	6%

86%
of cycle parking spaces were vacant
(Adjusted to 2021 London Plan)

21 sqm
NIA average office space per employee

6%
average cycle mode share

The 2025 surveys recorded an **average cycle mode share of 6%**, significantly below the **19% policy target** underpinning the current London Plan standard. This reinforces the finding that current provision levels are not aligned with observed demand, even in modern office buildings with high-quality facilities.

It is worth noting that these usage figures may overstate actual daily demand. Previous monitoring undertaken within the original study found that a **proportion of bicycles remained parked for extended periods and were not being used for daily commuting trips.** The findings therefore suggest that **actual daily demand for cycle parking may be lower than occupancy counts alone suggest.**

At the same time, the **growing use of dockless hire bikes and e-bikes means that cycling activity is increasingly decoupled from demand for long-stay office cycle storage.**

The City findings form the largest component of the overall dataset and provide significant evidence of the gap between current planning assumptions and real-world demand. Consistent with results observed elsewhere across central London, they demonstrate that cycle parking utilisation, employee density and private cycling mode share all remain materially below the assumptions underpinning current policy.



70 St Mary Axe, photo taken on 29 April 2025

West End

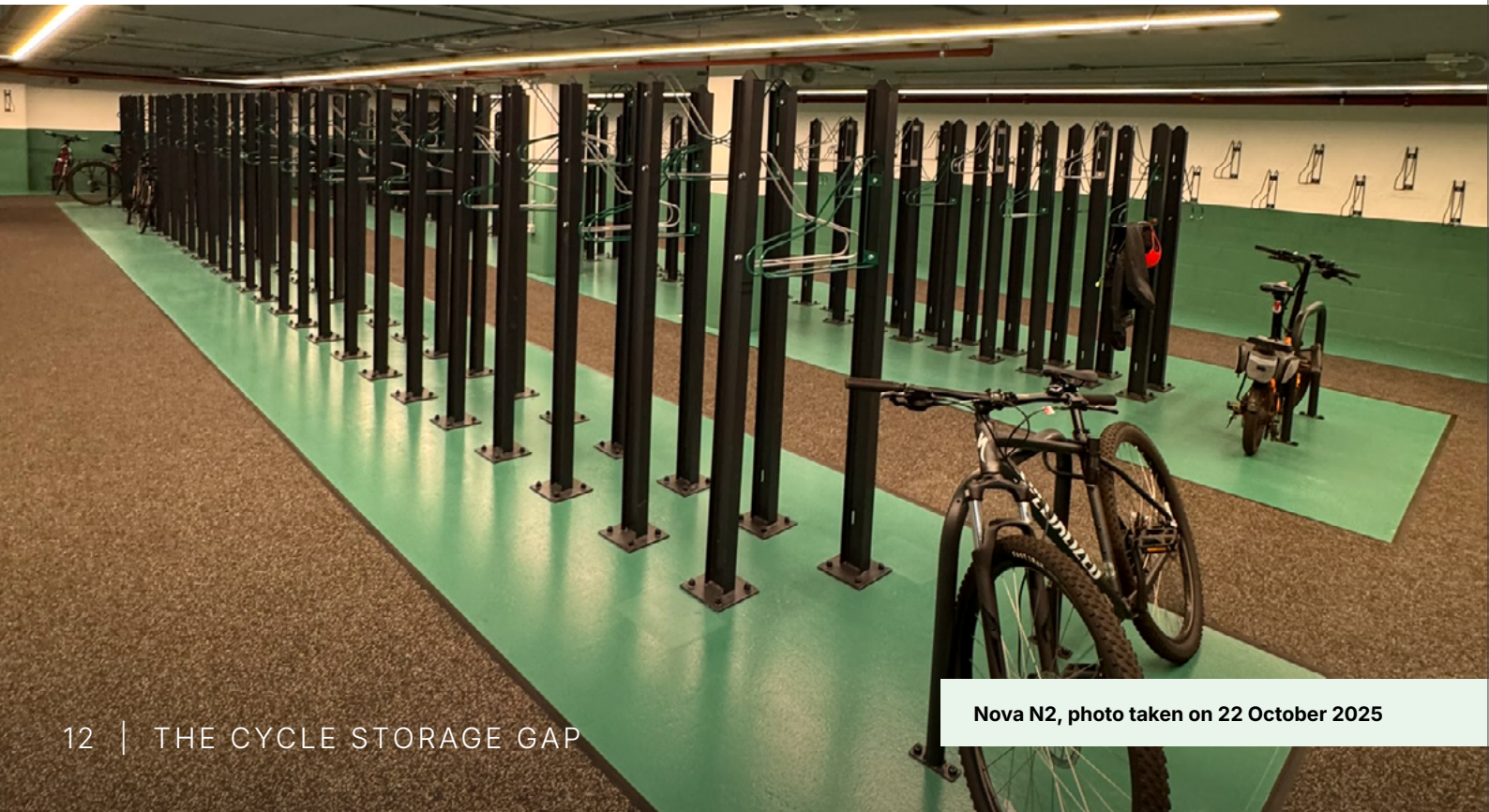
To understand whether the trends identified in the City of London were evident across other important CAZ office markets, the study was expanded at the end of 2025 to include approximately 180,000 sqm GEA of prime West End office space. The survey covered buildings **accommodating more than 7,400 employees and providing nearly 2,000 cycle spaces**. The sample included One Soho Place, 18 Hanover Square, Nova North, Nova South, Nova N2, Zig Zag and 123 Victoria Street.

Average employee density across the surveyed buildings was **one employee per 17 sqm NIA**.

While slightly higher than that recorded in the City of London, this remains **substantially below the employee density assumptions used to inform the 2021 London Plan cycle parking standard**.

Across all surveyed buildings, **79% of cycle parking spaces were vacant during peak periods when adjusted for current London Plan standards**. Where cycle entry data was available, recorded levels of use were lower than physical occupancy counts, indicating that **a proportion of bicycles remained parked for extended periods rather than being used for regular commuter journeys**.

Building	Typical Mid-Week Employee Density	Number of Cycle Spaces	Occupied Cycle Spaces	Occupied Office GEA (sqm) per Bike	Percentage occupation of cycle parking spaces	Cycle Spaces Occupied (Adjusted to 2021 London Plan)	Cycle Mode Share
Average total	17 sqm NIA 24 sqm GEA	1,954	504	356	25.79%	21%	6.74%



Nova N2, photo taken on 22 October 2025

79%
of cycle parking
spaces were vacant
(Adjusted to 2021 London Plan)

17 sqm
NIA average office
space per employee

7%
average cycle
mode share

The West End survey recorded an average cycle mode share of around 7% based on physical cycle counts, broadly consistent with the City of London findings. Where cycle entry data was available, actual recorded cycle entries suggested regular daily demand may be lower with a mode share of 5%.

As with the City survey, the results point to a persistent disconnect between commuting patterns and cycle parking policy standards. Buildings with relatively high employee densities still recorded substantial levels of vacant cycle parking.

The West End findings closely mirror those recorded in the City of London and wider central London sample. Despite differences in occupier mix, building typology and location, all three survey areas recorded substantial levels of unused cycle parking provision.

This suggests that cycle parking over-provision in modern office buildings developed under recent London Plan standards is not confined to a particular market or geography, but is evident across central London's office market.



Conclusion

This report brings together evidence from over one million square metres GEA of commercial development across the City of London, West End and wider CAZ and NIOD. Across all three survey areas, the findings are consistent. Modern office buildings operate at significantly lower average employee densities than those used to inform current cycle parking standards, leading to extensive cycle parking over-provision. Private **cycle mode share is also materially below the 19% policy target**, at around 7% across central London.

Our research does not argue against cycling or high-quality cycling facilities. Rather, it demonstrates that the current gross floorspace-based approach is generating levels of cycle storage provision that are significantly misaligned with demand. This is needlessly increasing embodied carbon in London's office developments, weakening viability and the efficient use of commercial space, particularly where extensive basement construction is required.

The Draft London Plan represents a welcome shift towards a more evidence-led approach.

Its proposed move to employee-based standards, including an assumed density of one employee per 15 sqm NIA, is welcomed. This alongside greater flexibility around delivery reflects many of the recommendations set out in our original *Cycling & the City* 2024 publication.

The Alliance welcomes these proposals and will continue to engage constructively with the GLA throughout the consultation process. Future policy should place greater emphasis on the quality, accessibility and flexibility of cycling facilities, while ensuring provision is aligned closely with real employee density and local demand. Where future demand remains uncertain, buildings should be afforded greater flexibility to phase delivery and make productive use of surplus space.

Such an approach would continue to support cycling while reducing unnecessary cost, embodied carbon and underutilised space across central London. It would also ensure that valuable office floorspace can be used more efficiently, supporting the delivery of the workspace needed to sustain London's long-term productivity and growth.

This report builds on the evidence base established by the CPA's Cycling & the City report. The research was commissioned by the London Property Alliance and informed by the Alliance's Cycling Working Group, with Velocity undertaking the surveys, data collection and analysis.

The study combines evidence from the City of London, West End and a new CAZ- and NIOD-wide survey of modern office buildings. Velocity undertook site visits, cycle parking counts, reviews of end-of-trip facilities and analysis of employee density data.

To ensure a robust comparison with current planning policy, surveys focused on recently completed or comprehensively refurbished office buildings which provided high-quality cycling facilities. Surveys were undertaken during peak midweek periods and in dry weather conditions to provide the most reliable indication of cycle parking demand. These findings take account of observed workplace occupancy and are therefore not simply a reflection of partially occupied buildings.

The findings provide the most comprehensive assessment to date of cycle parking utilisation across central London's office market.

About London Property Alliance

London Property Alliance brings together the CPA and WPA to provide a unified voice for the leading owners, developers, investors and professional advisors of real estate across central London.

Combined we represent over 300 members, ranging from FTSE 100 companies and the Great Estates to affordable housing providers and boutique architectural practices. We are not-for-profit, and the only property industry body which represents London's CAZ. The Alliance delivers informative events, publishes innovative research and represents our members' interests to politicians and policymakers.



London Property Alliance

