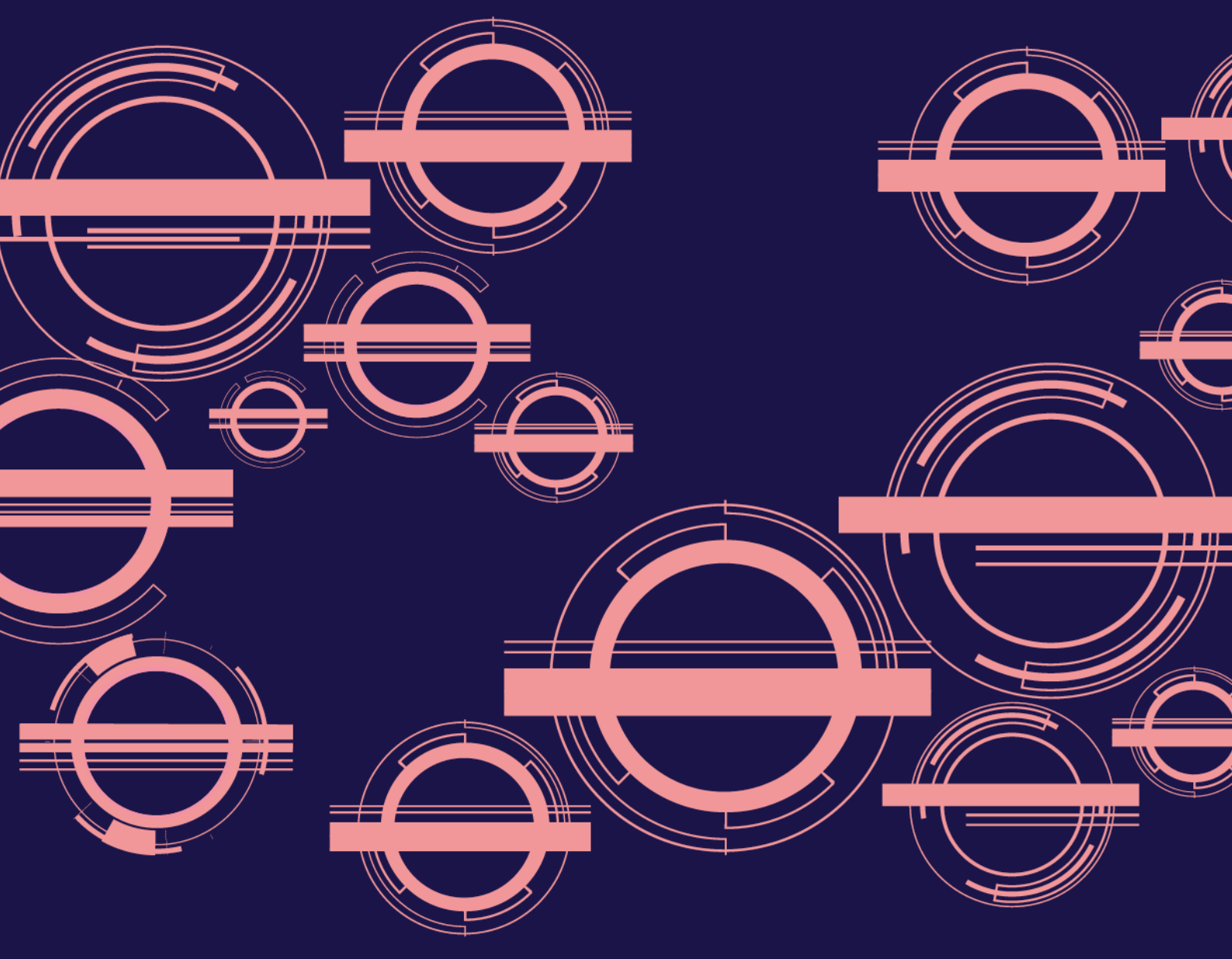


December 2024



Travel in London 2024

Focus report: Car ownership trends

MAYOR OF LONDON



**TRANSPORT
FOR LONDON**
EVERY JOURNEY MATTERS

Travel in London 2024

Focus report: Car ownership trends

©Transport for London 2024

All rights reserved. Reproduction permitted for research, private study and internal circulation within an organisation. Extracts may be reproduced provided the source is acknowledged.

Disclaimer

This publication is intended to provide accurate information. However, Transport for London (TfL) and the authors accept no liability or responsibility for any errors or omissions or for any damage or loss arising from use of the information provided.

Table of contents

Summary.....	4
Car ownership trends in London.....	6
Introduction.....	6
Car registrations.....	6
Spatial changes in car registrations.....	7
Car-free and multi-car households.....	8
Dimensions of changing car ownership.....	11
Demographic changes to car ownership.....	11
Age group.....	13
Household size.....	13
Household structure.....	14
Household income.....	15
Other demographic groups.....	17
Traffic reduction and car ownership.....	17
Car traffic trends.....	17
Trip rate trends.....	19
Car driving licence holding.....	20

Summary

This focus report reviews recent trends in car ownership in London, provides a comparison to national trends and considers several factors that could be influencing this. A reduction in car ownership in London is important to meet the aims set out in the Mayor's Transport Strategy.

The Mayor's Transport Strategy set a target for 250,000 fewer cars to be owned in London by 2041, compared to 2016. In 2023, 2.6 million cars were registered in Greater London, 70,000 fewer cars than in 2016. This is a reduction of 2.7 per cent against an overall reduction required to meet the target of 9.4 per cent, showing that we are broadly on track to meet the target. Against the wider backdrop of policies to encourage a shift away from cars towards active, efficient and sustainable modes and reducing reliance on the car, it is also clear that there are a range of wider social and economic factors driving this trend.

Over the last five years there has been a decoupling of population and car ownership trends in London, with cars registered in London decreasing while population increases. Since 2019 London's population has increased by one per cent, while car registrations have fallen by 2.5 per cent. This differs to the national trend where registrations have risen faster than population growth.

The long-term trend in household car ownership since 2010/11 has been a shift from multi-car to one-car households, as well as a shift from car-owning to car-free households, with the former being the dominant trend since 2019/20. Between 2019/20 and 2023/24 there was an 18 per cent reduction in multi-car households in inner London and a four per cent reduction in multi-car households in outer London. However, whether this reflects change among established households or predominantly new households is not clear from the available data.

Car ownership in London varies by demographic group and household location, as well as personal preferences and lifestyle choices. London residents who have household access to a car are disproportionately aged between 45 and 64, in full-time employment or retired, and living in high income households.

Household car ownership increases with household size. In 2023/24, 29 per cent of one-person households had access to a car. This increased to 66 per cent of three-person households and 78 per cent of households with five or more residents. Car ownership also reflects location, with 62 per cent of households in inner London being car free in 2023/24 compared to 33 per cent in outer London.

While certain sociodemographic groups are more likely to own a car, change in car ownership over time varies by group. There are also a range of factors driving the relative reduction in car ownership and therefore type of shift from multi-car to one-car households or to car-free households. The reduction in car registrations in London has been greatest since 2019, and a comparison of household car ownership between 2023/24 and 2019/20 shows the following trends:

- **Age group:** The greatest shift was for those aged 17-24, 25-44 and 45-59. However, for London residents aged 17-24 and 45-59 there was an increase in the proportion living in one-car households, while for those aged 25-44 there was an increase in the proportion living in car-free households. This suggests a trend towards 'down-

shifting', with households progressively moving from multi-car ownership to one car, and then to no cars.

- **Household size:** The reduction in multi-car households by household size was largely a result of households with four or more residents reducing their car ownership. For four-person households the shift was to both one-car and car-free households, while for households with five or more people the shift was mainly to one-car households.
- **Household structure:** Households comprised of a couple with children (of any age) saw a shift from multi-car owning to one-car households, with a two percentage point decrease in the proportion of multi-car households and a corresponding increase in the proportion of one-car households.
- **Household income:** The cost-of-living crisis may be influencing the increase in car-free households, as the increase in the proportion of people living in car-free households was greatest in the lower- to middle-household income bands and for households comprised of single parents or where residents are not related, both of which tend to be lower-income households.

Young adults delaying life stage milestones such as leaving home and living independently, could also impact car ownership. The delay in getting a car driving licence is likely a product of delaying other milestones as well as wider factors such as the challenges of securing driving tests during the pandemic and the subsequent backlog.

When comparing the data from 2012/13 and 2023/24, a lower proportion of younger people were obtaining their licence in 2023/24 and an increasing proportion of older people had licences compared to 10 years ago. In 2019/20, 14 per cent of London residents aged 17-19 and 53 per cent of London residents aged 20-29 held a full car driving licence, compared to nine per cent and 46 per cent respectively in 2023/24. At the national level the most cited reason for young adults to delay licence holding was cost, and the proportion citing this increased in recent years, showing the cost-of-living crisis may be having a continued impact on young London residents delaying or forgoing licence holding.

Car trip rates in London have been declining at a faster rate than overall trip rates over the last decade, and a further reduction in trip rates in London as a result of pandemic-related changes to travel demand has resulted in lower levels of car traffic persisting since the pandemic. The reduction in car trip rates in London is greater than at the national level, where the majority of the decline over the last decade has been since 2020, while in London the declining trend in car trip rates started before the pandemic. Therefore, change in car ownership in London is likely being impacted by a range of London-specific factors. These include a combination of investment in alternatives to car travel and changes to travel demand, particularly in locations where sustainable modes can support the majority of trips that London residents make.

Some of these trends like current economic circumstances and pandemic backlogs (such as driving test waiting lists) could mean some factors influencing the decrease in car registrations in London are in some cases resulting in a delay in ownership rather than a reduction, and therefore this trend will continue to be monitored.

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

Car ownership trends in London

Introduction

Historically, the number of cars in London has increased with population growth. While the rate of ownership has fallen, the increase in the number of people living in London led to an increase in cars owned in London over time. However, in recent years this trend has not persisted. Since 2010 London's population has increased by around 11 per cent, while the number of cars owned in London has increased by one per cent. This is distinctly different to the national trend, where car registrations have increased by 15 per cent since 2010, while population has increased by eight per cent over the same period.

It is likely that a number of factors are influencing this:

- Improvements to public transport and the reallocation of road space towards active, efficient and sustainable modes are encouraging a shift to walking, cycling and public transport which could be enabling London residents to live without, or with fewer, cars.
- London Plan parking policies may also be impacting car ownership. The restrictions on car parking spaces for new residential developments are likely to have had some impact in the years since publication and will have a continued impact as new homes are built across London.
- Furthermore, there has been a reduction in young London residents learning to drive, with young people citing cost as a key factor in this, which could reflect the impact of the cost-of-living crisis.
- Lifestyle changes arising from the coronavirus pandemic, such as increased working from home and a fall in trip rates and overall personal mobility, may also be influencing the perceived need to own a car.

This report uses data from the London Travel Demand Survey (LTDS) and other sources to understand car ownership trends and determine potential causes of the reduction in car ownership in London.

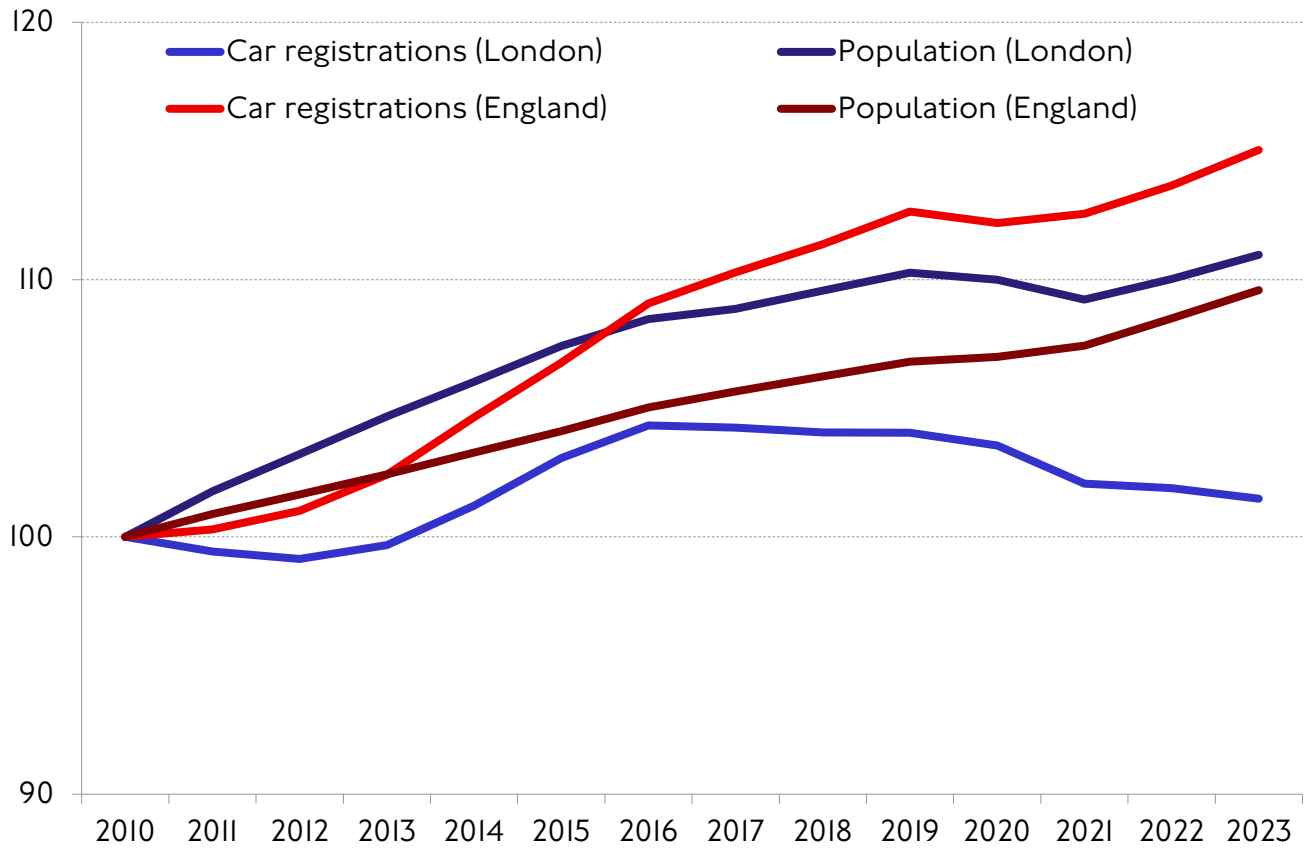
Car registrations

Historical trends indicate that as population increases this also leads to an increase in the number of cars registered, as seen in figure 1 between 2013 and 2016. However, since 2017 the trends in London have diverged, with population continuing to increase, albeit at a slower rate than over the previous decade, and car registrations plateauing until 2019 and then decreasing. It is possible that a number of factors may have influenced this reduction, such as disruption to supply chains during the pandemic affecting car manufacturing as well as the wider economic impacts. However, the reduction in cars registered in London continued to be seen in the most recent data (2023). Furthermore, although it could also be expected that these factors would affect car ownership across England, car registrations nationally increased by two per cent between 2019 and 2023.

A reduction in car ownership in London is important to support the aims set out in the Mayor's Transport Strategy. The Mayor's Transport Strategy set out the target for 250,000 fewer cars to be owned in London by 2041, compared to 2016. In 2023, 2.6 million cars were registered in Greater London, 70,000 fewer cars than in 2016, and a reduction of

2.7 per cent against an overall reduction of 9.4 per cent required to meet the target. This shows that we are broadly on track to meet the target set out in the Strategy.

Figure 1 Change (index: 2010 = 100) in car registrations and population in London and England, 2010-2023.



Source: Department for Transport and Office for National Statistics.

The change in cars registered in London in recent years followed a similar trend to other vehicle types. Since 2016 van registrations have fallen by 10 per cent, and motorcycle registrations by three per cent.

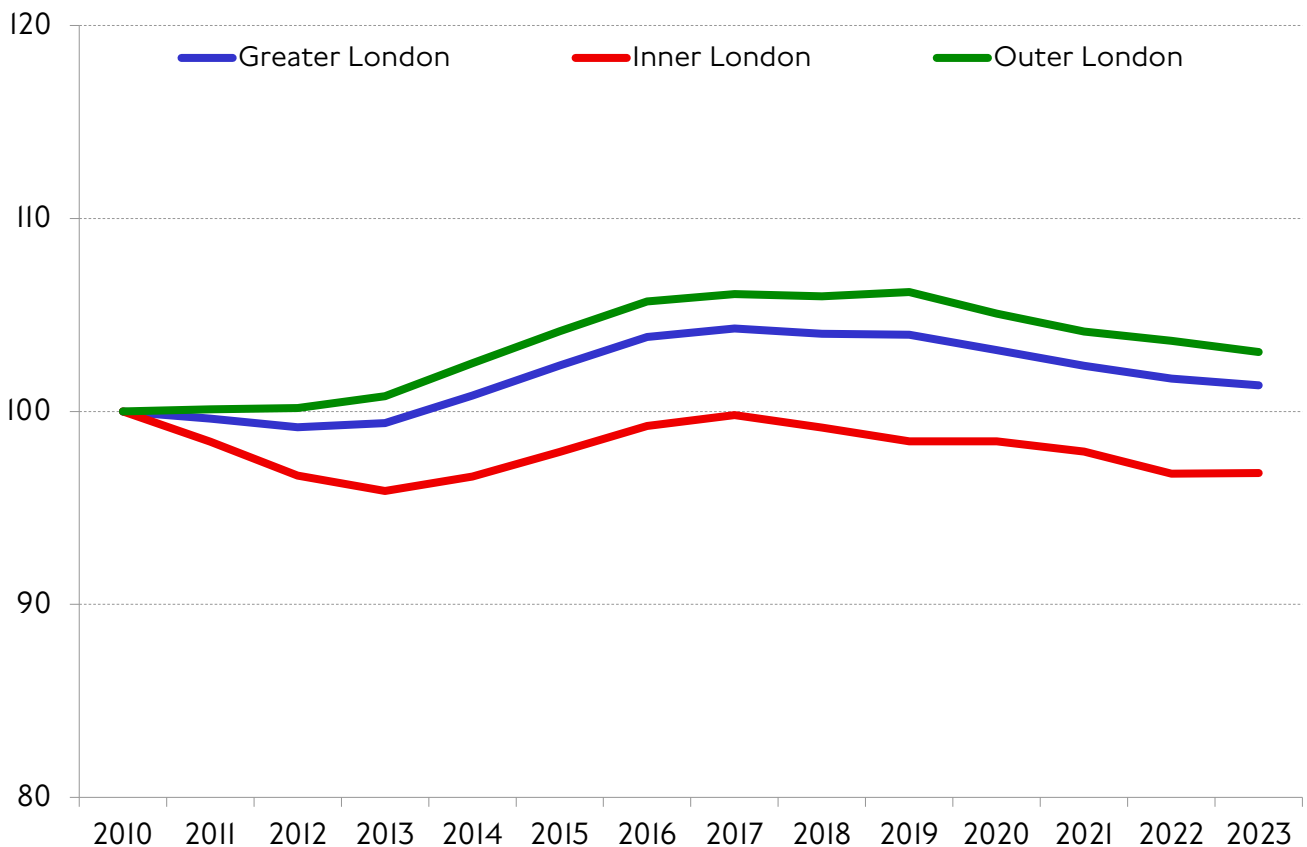
While there has been a decrease in total car registrations in London since 2019, the trend in registrations varies by fuel type. Between 2019 and 2023 the number of diesel cars registered in London fell by 44 per cent and the number of petrol cars increased by two per cent. Comparatively, the number of plug-in and battery electric cars registered in London was five times greater in 2023 than in 2019. Therefore, over time electric vehicles are comprising an increasing proportion of the car fleet. At the end of 2023 six per cent of cars registered in London were plug-in or battery electric.

Spatial changes in car registrations

Department for Transport vehicle registration data shows that car registrations in London in 2023 were only one per cent higher than in 2010, compared to a population increase over this time of 11 per cent. The number of cars registered in London fell by two per cent since 2019 (around 65,000 cars).

Figure 2 shows the trend in car registrations in inner and outer London, based on Department for Transport car registration data.

Figure 2 Change (index: 2010 = 100) in car registrations in London by area, 2010-2023.



Source: Department for Transport.

In inner London registrations decreased from 2010 until 2013, then returned to 2010 levels in 2017 and have since decreased.

In outer London car registrations rose steadily between 2013 and 2017, and then remained at a similar level until 2019. Between 2019 and 2023 car registrations fell by three per cent.

Since 2010 inner London car registrations fell by three per cent overall, and outer London registrations increased by three per cent. Both areas saw a decrease in registrations since 2019 of two and three per cent respectively, despite population increases in both areas over the same period.

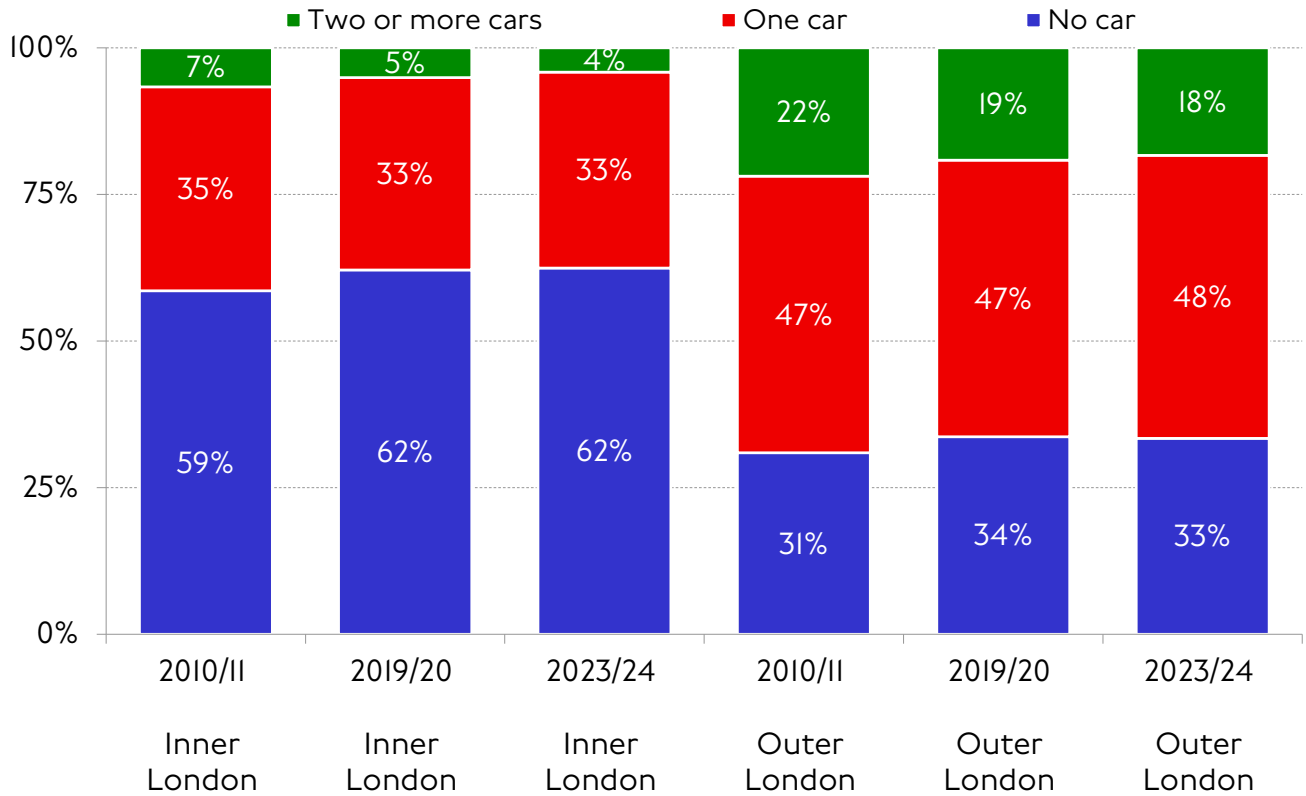
Car-free and multi-car households

London Travel Demand Survey data shows that the proportion of car-free households in London increased by 3.9 percentage points and 2.4 percentage points across inner and outer London respectively, since 2010/11 (figure 3).

Household car ownership data can be used to infer whether the reduction in vehicles registered in London is a result of multi-car households reducing the number of vehicles they own or a result of an increase in car-free households. The data shows that between 2010/11 and 2019/20 the reduction was driven by both trends (a shift from households owning multiple cars to owning only one car as well as a shift from car-owning to car-free households). However, since 2019/20 the reduction was mainly due to a shift from multi-car households to one-car households as well as a small shift to car-free households in inner London. The number of multi-car households in London fell by

seven per cent between 2019/20 and 2023/24, although there was no change in the total number of car-free households.

Figure 3 Proportion of London households with access to a car by area, LTDS, 2010/11, 2019/20 and 2023/24.



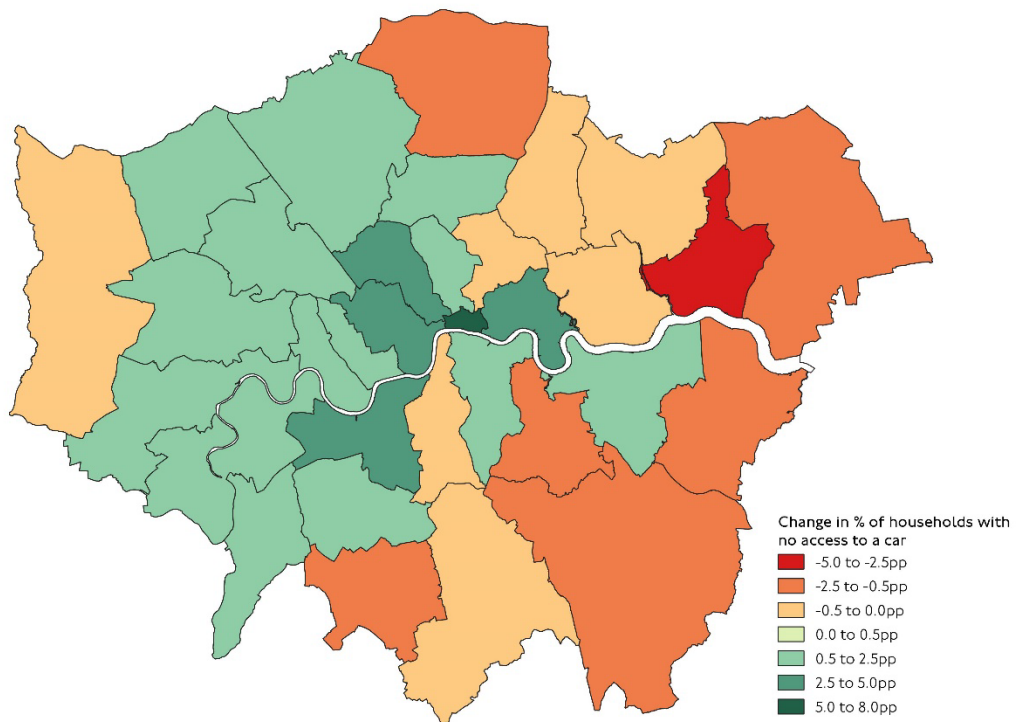
Source: TfL Strategic Analysis, Customer & Strategy.

Multi-car households comprise a small proportion of inner London households (less than five per cent), although between 2019/20 and 2023/24 there was an 18 per cent reduction in the number of multi-car households and an increase in car-free households of one per cent. In outer London the shift was predominantly from multi-car households to one-car households, with a four per cent reduction in the number of multi-car households in 2023/24 (from 2019/20) and a two per cent increase in one-car households over the same period.

Figure 4 shows the percentage point change in the proportion of households with no access to a car between the 2011 and the 2021 census by borough. Most inner London boroughs and outer London boroughs in west London saw an increase in the proportion of car-free households. Boroughs in east and southeast London had a slight reduction in car-free households, with the greatest reduction in the proportion of car-free households in Barking and Dagenham (five percentage points).

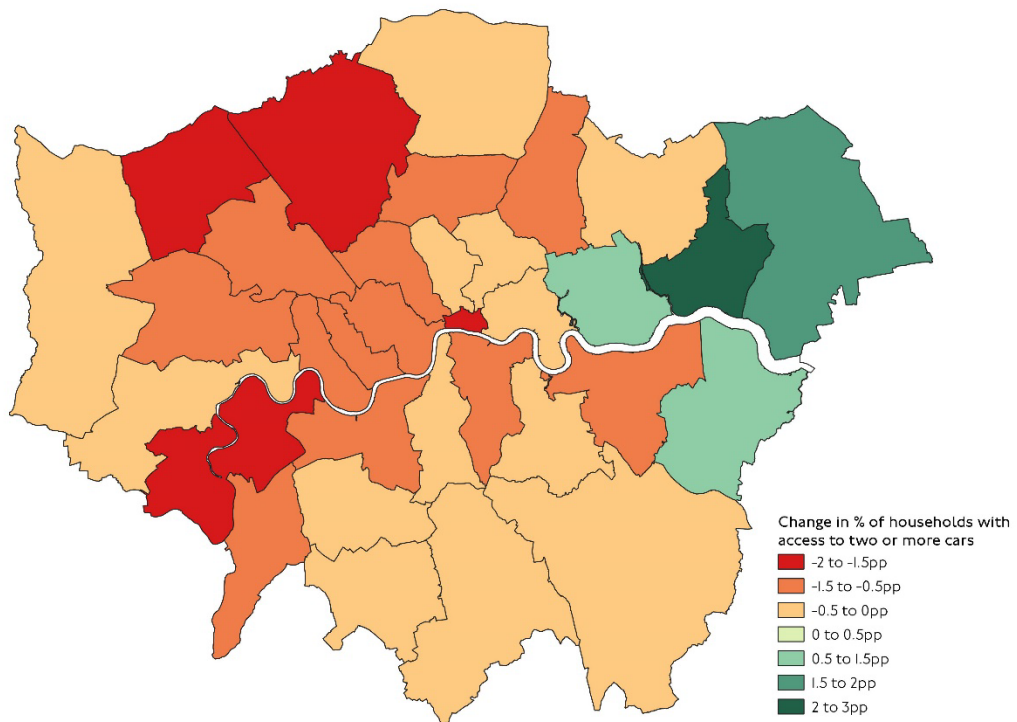
A reduction in multi-car households is a key factor influencing the reduction in cars registered in London. Figure 5 shows the percentage point change in the proportion of households with access to two or more cars between the 2011 and the 2021 census by borough. The boroughs with the greatest reduction were Richmond upon Thames and Barnet. Most London boroughs saw a reduction, although a few outer London boroughs in east London saw an increase. The proportion of multi-car households in Barking and Dagenham increased by three percentage points over the assessed period.

Figure 4 Change (between 2011 and 2021) in the proportion of households with no access to a car, by borough.



Source: Office for National Statistics

Figure 5 Change (between 2011 and 2021) in the proportion of households with access to two or more cars, by borough.



Source: Office for National Statistics

Dimensions of changing car ownership

The overall trend in car ownership in London varies when compared to the national trend and between inner and outer London. Therefore, it is of interest to consider aspects of household car ownership to better understand the main components of change.

This section firstly considers demographic changes to car ownership since 2019/20, the period with the greatest reduction in car registrations and then considers wider dimensions related to car ownership and travel, namely traffic volumes, trip rates and licence holding.

Demographic changes to car ownership

Car ownership in London varies by demographic group and household location as well as personal preferences and lifestyle choices. Figure 6 shows household car ownership by key sociodemographic variables, taking 2023/24 as an example year. It shows the sociodemographic profile of London residents who live in households with access to a car alongside the profile of London's population, to understand where certain groups are over- or underrepresented compared to the general population.

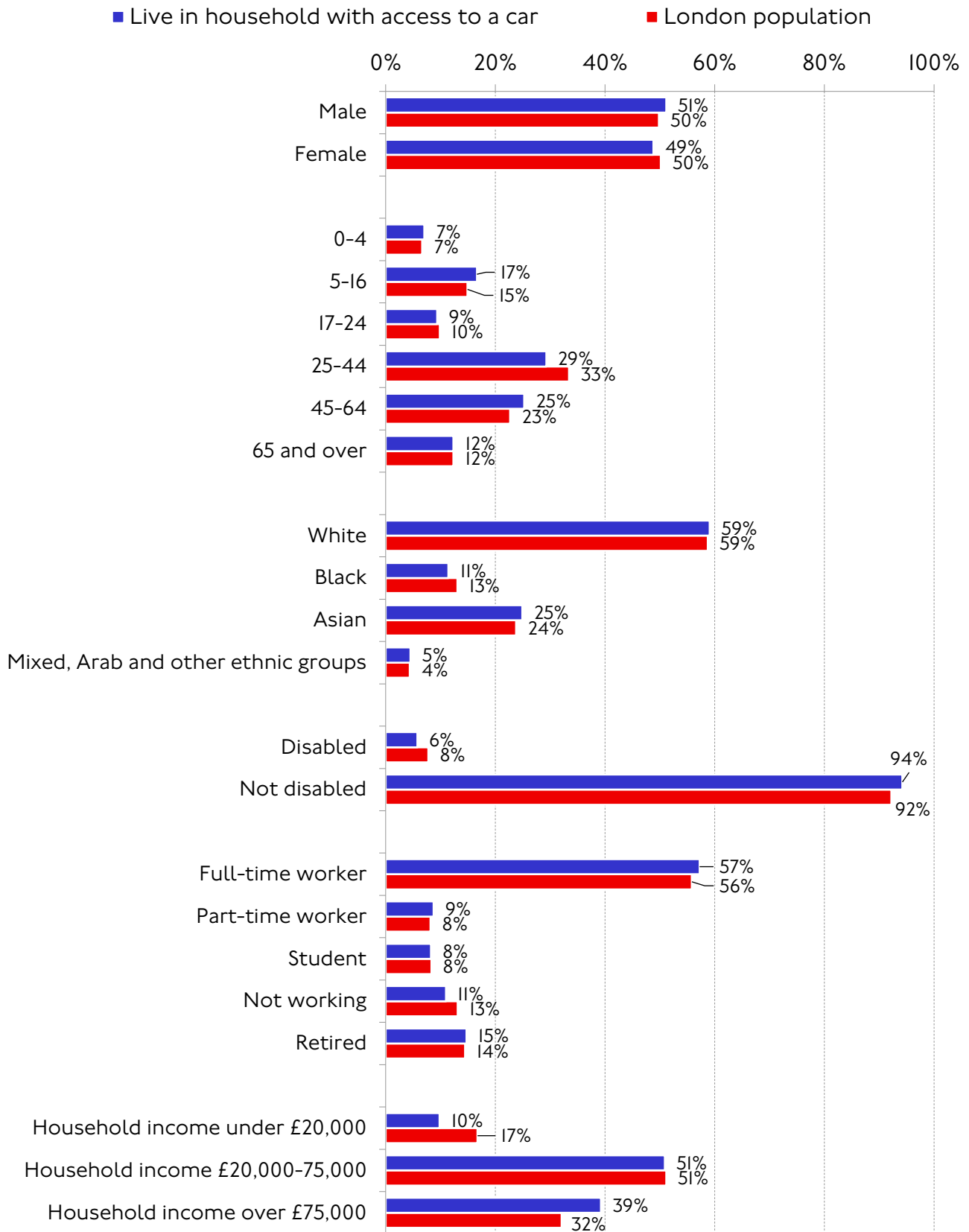
London residents who live in households with access to a car are disproportionately aged between 45 and 64, in full-time employment or retired, and living in high-income households. Nationally, the demographic trends in car ownership are broadly similar, with car ownership increasing with household income and household size, as well as higher levels of car ownership in households with children.

Spatial factors also influence car ownership, given that the ability to access amenities by sustainable modes is often a product of land use and density. This results in lower levels of car ownership in inner London when compared to outer London. In 2023/24, 62 per cent of households in inner London were car free, compared to 33 per cent in outer London. Furthermore, there are links between demographic variables and place of residence (such as a higher proportion of older residents living in outer London) which is also likely to influence access to a car for certain demographic groups.

The London Travel Demand Survey collects data at a household, person and trip level. Car ownership is recorded as household access to a car, although the data can also be used to understand the demographics of London residents who live in car-owning households (but may not themselves actually own a car), and how this has changed over time.

Car registrations in London are around one per cent higher than 15 years ago, and registrations have decreased by two per cent since 2019, therefore the latter will be used as the time period of focus to consider the drivers of this reduction in car ownership.

Figure 6 Proportion of London residents living in households with access to one or more cars versus London resident population, by sociodemographic group, LTDS, 2023/24.

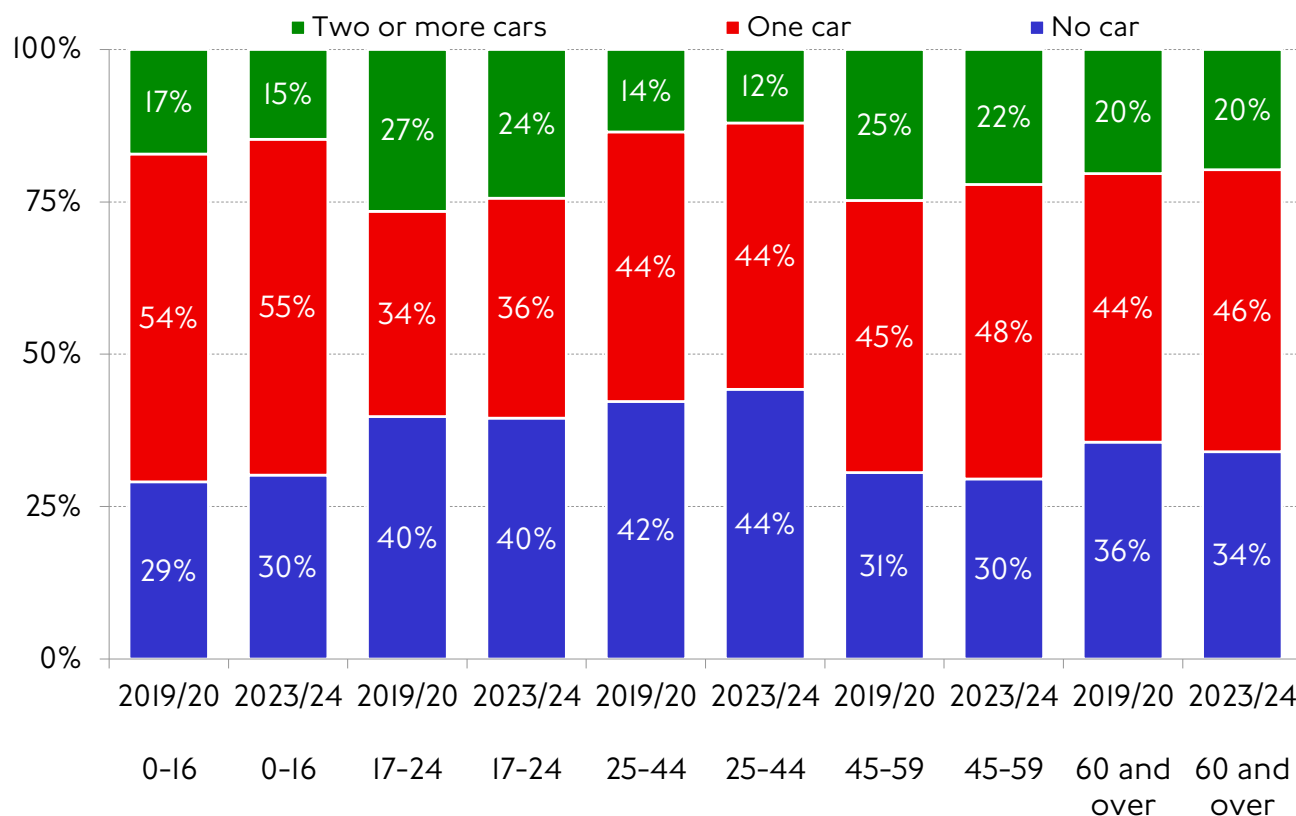


Source: TfL Strategic Analysis, Customer & Strategy.

Age group

The proportion of London residents living in a household with access to at least one car is highest in the youngest (0-16) and older (45-59 and 60 and over) age groups, while a higher proportion of London residents aged 17-24 and 25-44 live in car-free households. However, the highest proportion of residents living in multi-car households by age group are London residents aged 17-24 (figure 7).

Figure 7 Proportion of London residents with access to a car in their household by age group, LTDS, 2019/20 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

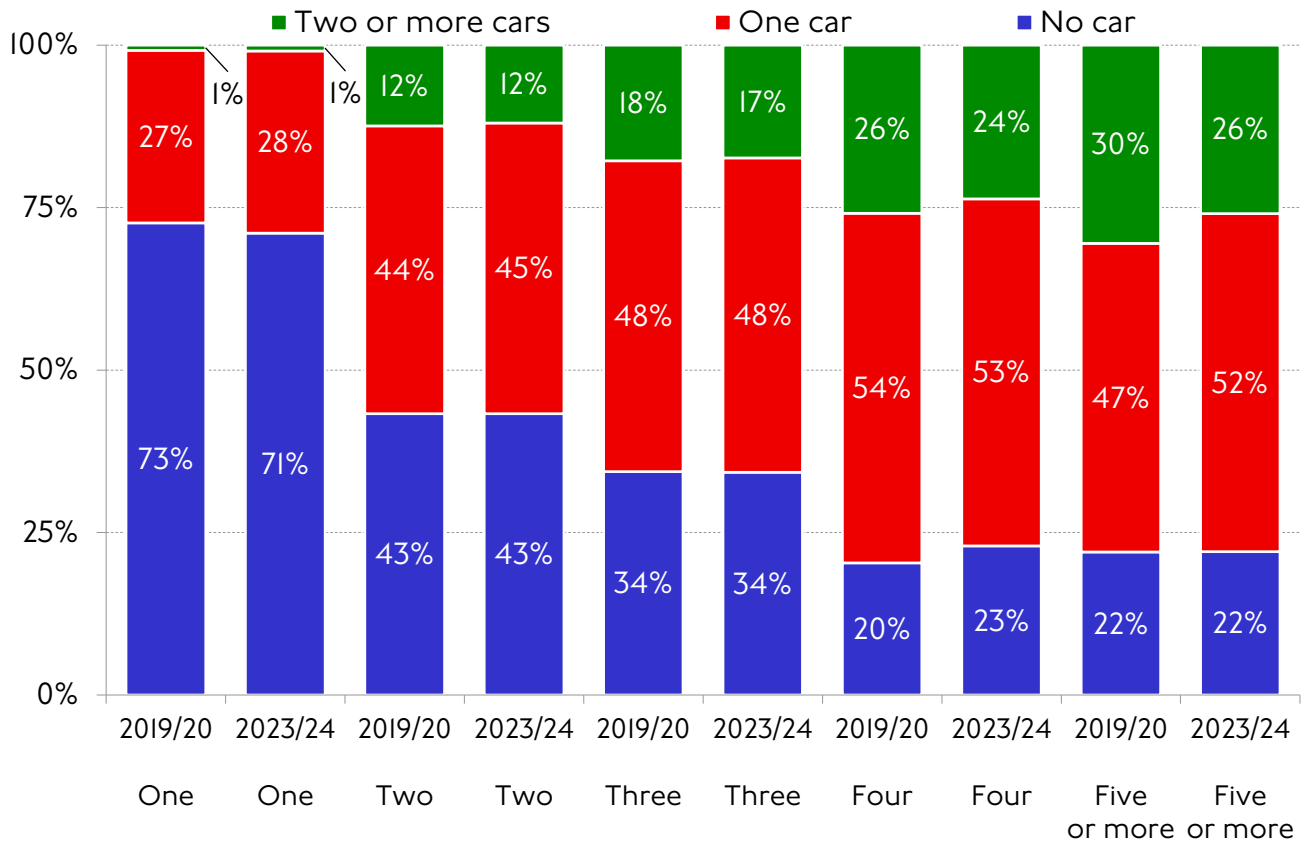
The proportion of people living in multi-car households reduced between 2019/20 and 2023/24 for all age groups, apart from London residents aged 60 and over. The greatest shift was for those aged 17-24, 25-44 and 45-59. However, there was an increase in the proportion of London residents aged 17-24 and 45-59 living in one-car households, while for those aged 25-44 there was an increase in the proportion of them living in car-free households. This suggests a trend towards 'down-shifting', with households progressively moving from multi-car ownership to one car, and then to no cars. In many circumstances a range of age groups will be living in a single household, therefore further analysis is needed to understand how household composition may also be impacting this car ownership change.

Household size

Household car ownership increases with household size. In 2023/24, 29 per cent of one-person households had access to a car. This compared to 66 per cent of three-person households and 78 per cent of households with five or more residents.

Figure 8 shows the change in car ownership by household size between 2019/20 and 2023/24.

Figure 8 Proportion of London households with access to a car by number of residents in the household, LTDS, 2019/20 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

This shows that the reduction in multi-car households was largely a result of households with four or more residents reducing their car ownership. For four-person households the shift was to both one-car and car-free households, while for households with five or more people the shift was mainly to one-car households. One-person households were the only household size to see a reduction in the proportion of car-free households.

Household structure

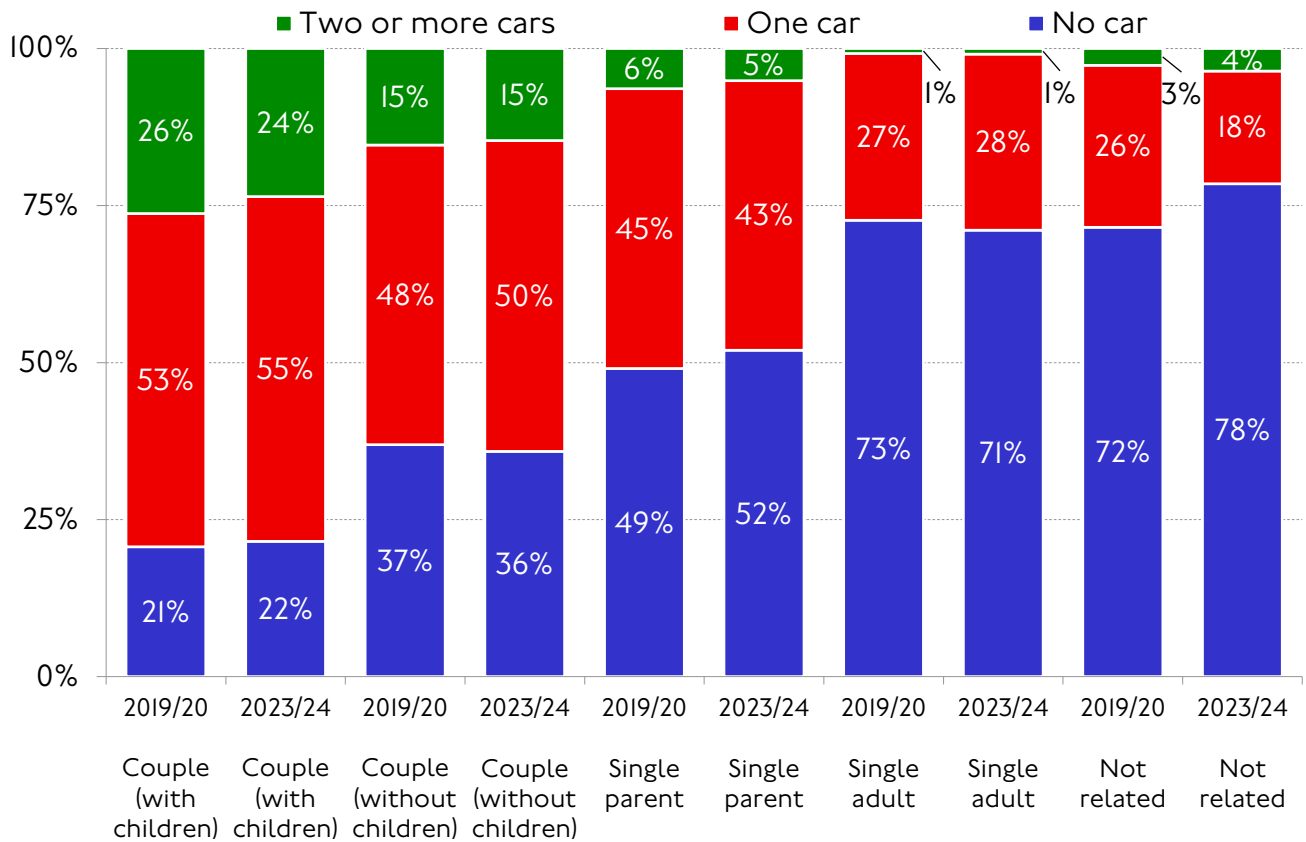
The decision to purchase a car is often influenced by life stages, for example moving house or having children. Convenience and flexibility are often cited as key reasons for owning a car and the requirements for this can be linked to life stages. For example, moving to a location where a car is needed to access amenities or to facilitate the trip chaining required for taking children to school and commuting to work.

This can be seen when comparing car ownership levels of couples with and without children (figure 9), which demonstrates a difference in the proportion of households with access to a car between those groups. While having children in the household is one factor influencing car ownership, there are likely to be other factors such as the location of the household as well as the age and income of residents.

Figure 9 shows that the number of cars a household has access to varies substantially by living arrangement. Households with a couple and children have the highest levels of car

ownership, although between 2019/20 and 2023/24 there was a slight reduction in the proportion of multi-car households and a shift to one-car households.

Figure 9 Proportion of London households with access to a car by household structure, LTDS, 2019/20 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

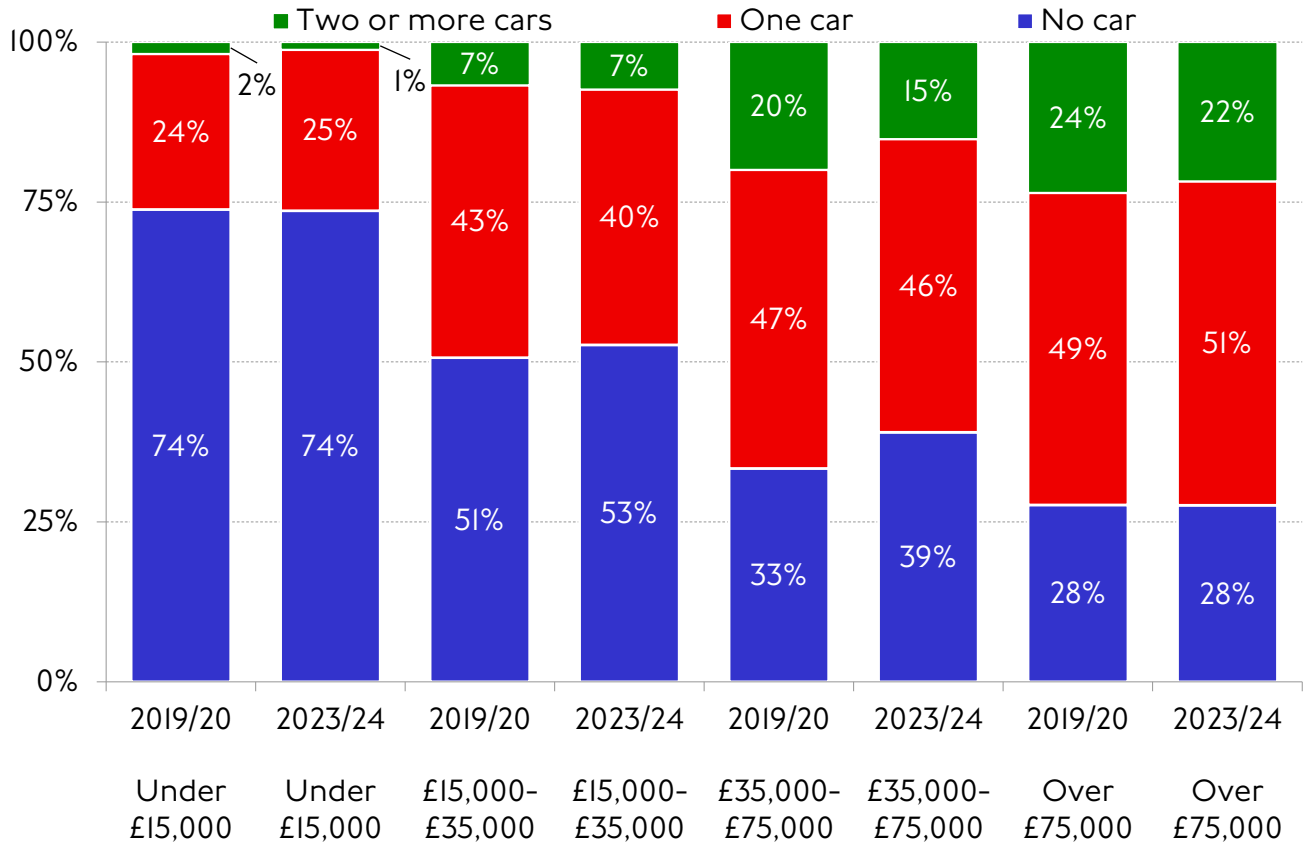
Single parent households and households where residents are not related both saw a reduction in the proportion of car-owning households between 2019/20 and 2023/24, with the proportion of households where residents are not related and have no access to a car increasing by six percentage points. These households also tend to be lower-income households compared to other household types. In 2023/24, 27 per cent of single parent households had a household income of less than £15,000 compared to 16 per cent of all London households. Therefore, this could be a factor in car ownership change as these households are more likely to be impacted by cost-of-living challenges.

Household income

Household car ownership rises with household income, with around a quarter of households with an income under £15,000 having access to a car in 2023/24 compared to almost three quarters (73 per cent) of households with an income over £75,000 (figure 10).

The trend of ownership increasing by income group is also seen at the national level, albeit with higher levels of overall car ownership. For the households with an income in the lowest 10 per cent nationally, 35 per cent have access to a car, compared to 93 per cent for households in the highest 10 per cent.

Figure 10 Proportion of London households with access to a car by household income, LTDS, 2019/20 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

The greatest reduction in the proportion of multi-car households in London was for households with an income of £35,000 to £75,000. This group saw a five percentage point reduction in multi-car households since 2019/20 and a six percentage point increase in car-free households. This could relate to wider influences on car ownership which are more likely to impact middle- to higher-income groups such as changes to travel patterns arising from the coronavirus pandemic, like increased working from home.

There was limited change in car ownership in the lowest household income band (under £15,000), though the majority of these households do not own a car. For the £15,000 to £35,000 household income band there was a shift in the proportion of one-car households towards car-free households.

The cost-of-living may be having an impact on car ownership in lower-income households. The GLA's monthly [cost-of-living survey](#) showed that a third of London residents with household incomes under £20,000 were struggling to make ends meet or having to go without, or rely on debt to meet basic needs, compared to 18 per cent of all London residents. The survey showed that to manage living costs around half (49 per cent) of respondents living in low-income households (under £20,000) were spending less on non-essentials and 35 per cent reported using 'free transport' such as walking or cycling.

There was a slight shift from multi-car ownership to single-car ownership in the highest income households (over £75,000). Data from LTDS also shows that these households are more likely to own electric vehicles, with six per cent of vehicles owned by London

households in the highest income group (over £100,000) fully electric, compared to three per cent in the lowest income households (under £10,000).

Other demographic groups

In addition to differences in age and living arrangement influencing household car ownership, data from the LTDS can also be used to understand whether the changes in car ownership in recent years vary based on a range of other demographic variables. This analysis considered demographic groups and changes in car ownership between 2019/20 and 2023/24 to align with the time period with the greatest reduction in car registrations and showed that:

- **Ethnicity:** The greatest reduction in the proportion of people living in multi-car households was for Black London residents (11 per cent in 2023/24 compared to 16 per cent in 2019/20). There was an increase in the proportion of Black and Asian London residents living in car-free households of one percentage point and three percentage points, respectively.
- **Working status:** Students had the greatest reduction in the proportion of people living in multi-car households between 2019/20 and 2023/24 (five percentage points), although the proportion of students living in car-free households also decreased (by four percentage points). There was a reduction in the proportion of full-time workers living in multi-car households and an increase in those living in car-free households. However, the proportion of retired London residents living in car-free households fell by two percentage points between 2019/20 and 2023/24.
- **Disability:** The reduction in the proportion of London residents living in multi-car households was similar for residents with and without a disability. For London residents with a disability the shift was towards one-car households, while for those without a disability the shift was both towards one-car and car-free households.

Traffic reduction and car ownership

Car traffic trends

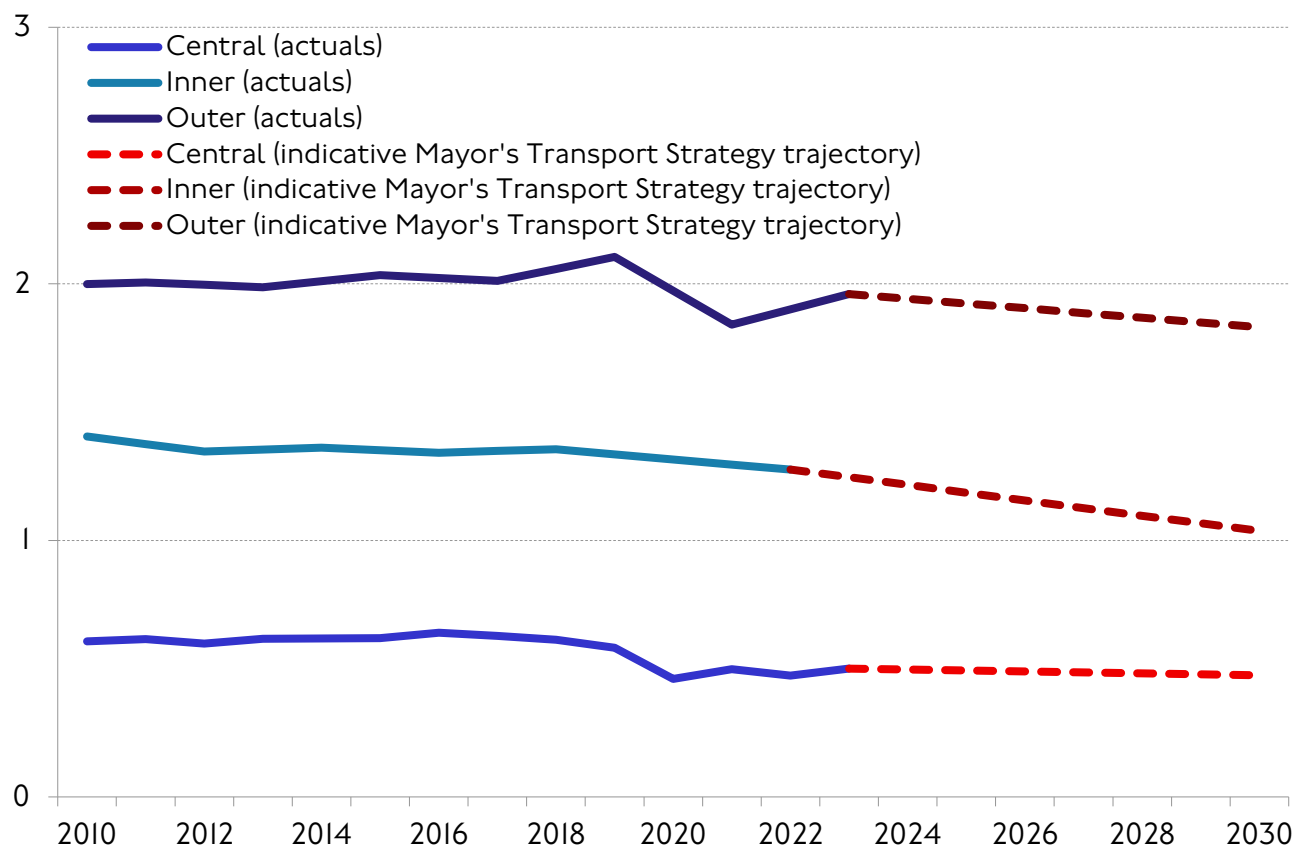
The Mayor's Transport Strategy sets out the aim to reduce the number of daily car journeys in London by three million by 2041. Figure 11 shows the historic trend and trajectory required to meet this target, monitored using data from TfL's strategic traffic counting cordons (central London cordon, inner London cordon and outer London/London boundary cordon). The central London cordon is surveyed annually, while the other cordons are surveyed in alternate years, meaning that intermediate years are interpolated on the graph.

The figure shows that, before the pandemic, car traffic across the central and inner London cordons was falling, with total cars crossing the central cordon four per cent lower in 2019 compared to 2010, and five per cent lower in inner London. This compares to a five per cent increase across the outer London (London boundary) cordon over the same period. These changes were also in the context of an estimated 11 per cent increase in London's population since 2010.

Post-pandemic data at the outer cordon shows that in 2023 the number of cars crossing this cordon was two per cent lower than in 2010, and seven per cent lower than in 2019. Car traffic across the central and inner cordons also remained below pre-pandemic

levels. Pandemic-related changes to travel demand, including an increase in working from home and an increase in active travel, have impacted car traffic in recent years and the most recent data shows lower traffic levels have persisted.

Figure II Cars (in millions) crossing London’s strategic cordons per day, 2010-2030.



Source: TfL Strategic Analysis, Customer & Strategy.

Note: The inner and outer cordon counts take place every other year in alternate years, with intermediate values interpolated. Due to the coronavirus pandemic there were no inner cordon counts in 2020 or 2021 (interpolated from 2018 and 2022) and no outer cordon counts in 2020 (interpolated from 2019 and 2021).

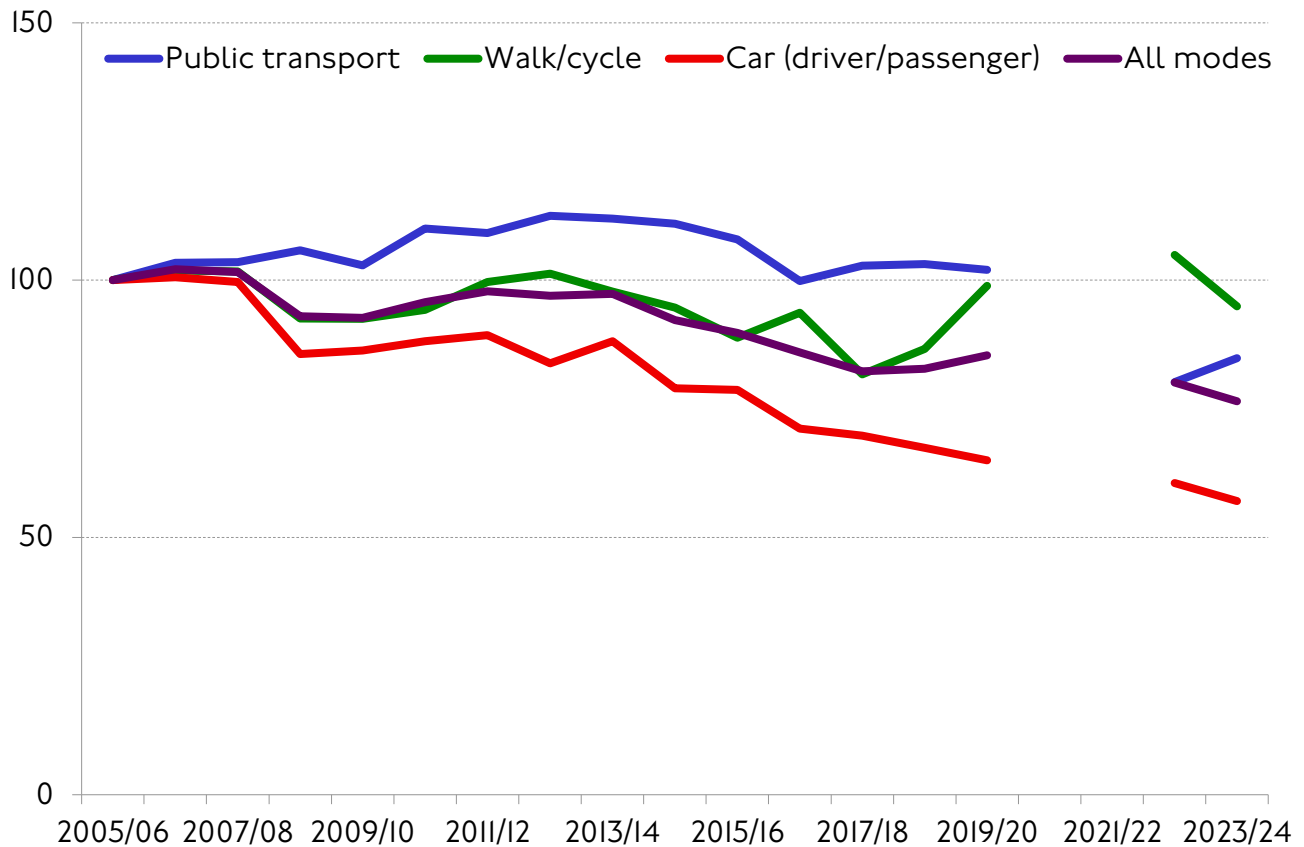
Car traffic crossing London’s strategic cordons does not directly correspond to vehicles owned in London, as this includes travel by non-London residents and there are also variations between ownership and use. However, change in car volumes across the cordons can be used to understand patterns of demand. For example, the downward trend in traffic crossing the strategic cordons, particularly in inner London, aligns with the general shift in car ownership from multi-car owning households to one-car households and the slightly smaller shift from one-car to car-free households.

The reduction in car traffic since 2010 partly reflects investment in public transport over this period, as well as significant improvements to walking and cycling networks supporting mode shift away from the car. As a result of this, an increasing proportion of London residents are able to make most of their trips by walking, cycling or using public transport, which can support a reduction in multi-car and one-car owning households. However, other factors (including changes to working patterns and a reduction in shopping and leisure trips) are also likely impacting traffic volumes over this period.

Trip rate trends

Figure 12 shows the change in London residents' daily trips per person by mode, indexed to 2005/06. It shows that while trip rates in London have fallen over time, car trip rates have fallen at a greater rate compared to other modes.

Figure 12 Change (index: 2005/06 = 100) in trips per person per day by mode, LTDS, 2005/06-2023/24.



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 2023/24, London resident trip rates (all modes) were 21 per cent lower than in 2013/14, driven by a reduction in shopping, personal business and leisure trips prior to the pandemic and, since 2019/20, a reduction in commuting trips. A similar trend has been seen at the national level, with the National Travel Survey reporting a fall in trip rates of seven per cent over the last decade.

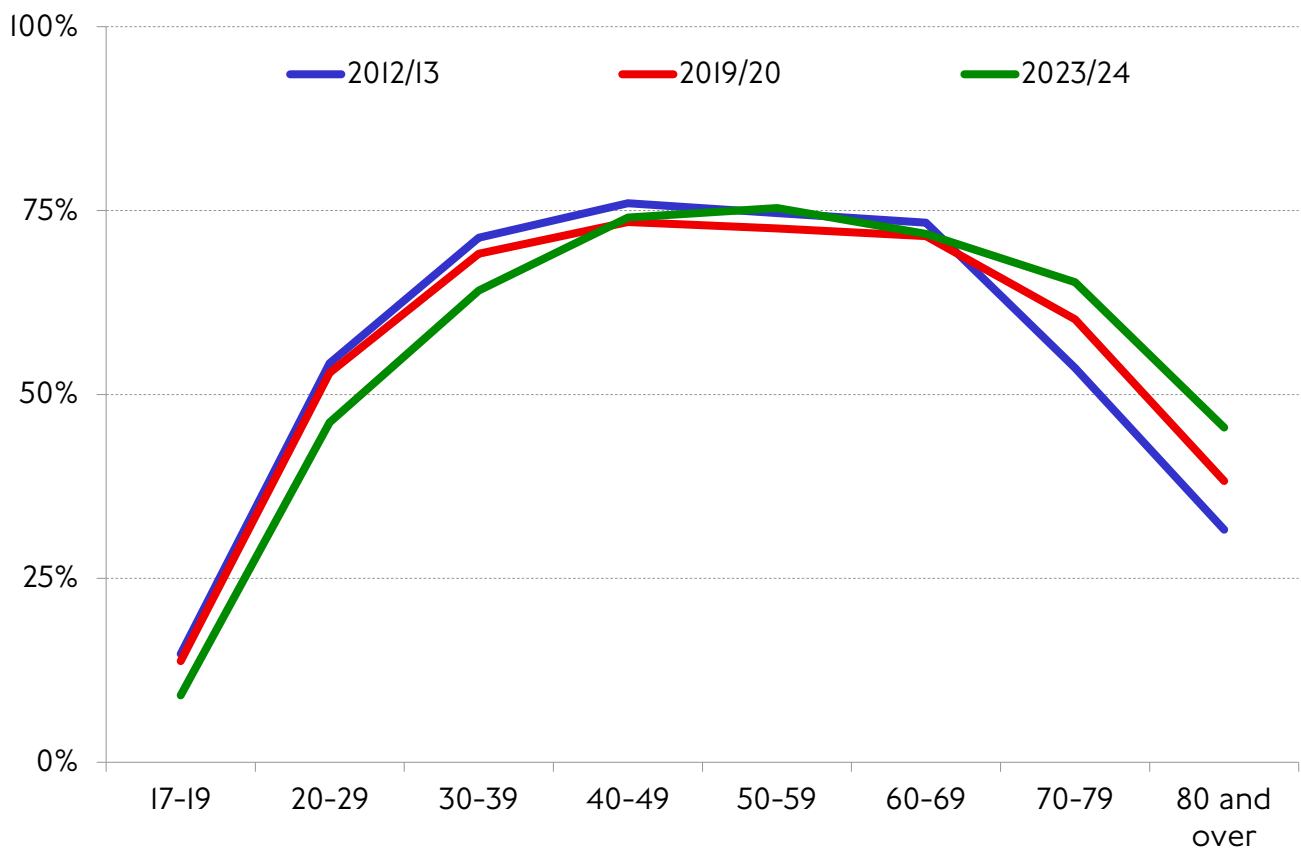
Public transport trip rates in London declined at a similar level to overall trip rates (a reduction of 24 per cent over the last decade), while walking and cycling trip rates fell by just three per cent. This compares to car trip rates, which fell by over a third (35 per cent) over the last 10 years. Nationally, car trip rates fell by around seven per cent since 2013/14, although most of the reduction has been since 2020 and was therefore predominantly as a result of pandemic-related changes to travel demand, while the reduction in car trip rates in London began before the pandemic.

Car driving licence holding

Young adults delaying life stage milestones, such as leaving home and living independently, has been well documented. This is also evident when looking at car driver licence holding and is likely a product of delaying other milestones as well as wider factors such as the challenges of securing driving tests during the pandemic and the subsequent backlog in test bookings. Nationally, there has been a four percentage point reduction in people aged 17-20 and 21-29 obtaining a full car driving licence since 2010.

Figure I3 shows that this reduction in the number of young adults holding a full car driving licence is also seen in London. When comparing the data from 2012/13, 2019/20 and 2023/24 it is seen that a lower proportion of younger people are obtaining their full car driving licence and an increasing proportion of older people have licences compared to 10 years ago. In other words, the distribution of licence holding is shifting to the right of the age range over time.

Figure I3 Proportion of London residents who hold a full car driving licence by age group, LTDS, 2012/13, 2019/20 and 2023/24.



Source: TfL Strategic Analysis, Customer & Strategy.

Data from the LTDS shows that in 2019/20, 14 per cent of London residents aged 17-19 and 53 per cent of London residents aged 20-29 held a full car driving licence, compared to nine per cent and 46 per cent respectively in 2023/24. There is also an increasing proportion of London residents aged 30-39 who do not hold a full car driving licence. In 2023/24, 64 per cent held a full car driving licence, five percentage points below the 2019/20 level.

The Department for Transport tracks the reasons for not learning to drive at a national level using the National Travel Survey, asking both a single response and multi-response

question. When respondents aged 17-20, 21-29, and 30-39 were asked for a single reason for not learning to drive the main response was cost of learning to drive. Around a fifth of respondents in each age group cited this as the main reason.

There is a difference between the age groups when respondents were able to provide multiple reasons for not learning to drive. While cost remained a key reason for not learning to drive for those aged 17-20 (38 per cent), 25 per cent stated they were too busy to learn, and 26 per cent stated that friends and family can drive them when necessary. The latter could be as a result of an increasing proportion of young adults living at home for longer. For people aged 21-29 and 30-39 the cost of learning to drive, insurance and buying a car were the most frequently cited reasons for not learning. For 30-39 year olds the proportion of respondents citing the cost of buying a car and the cost of insurance as a barrier to learning to drive has increased by around 11 percentage points since 2019, showing that cost-of-living pressures are likely having an influence on further delaying licence holding.

Car driving licence holding impacts car ownership as the higher the number of licence holders living in a household the more likely the household is to own multiple cars (table I). Therefore, a delay in younger London residents learning to drive, or choosing not to, could have an impact on the number of cars registered in London, and particularly on multi-car households.

Table I Household car ownership by number of full car driving licence holders in household, LTDS, 2023/24.

Residents with full car driving licence	No cars	1 car	2 cars	3 cars	4 or more cars
0	100%	0%	0%	0%	0%
1	39%	59%	1%	0%	0%
2	17%	57%	25%	1%	0%
3	5%	28%	47%	15%	4%
4 or more	2%	13%	39%	28%	18%

Source: TfL Strategic Analysis, Customer & Strategy.

This delay in young London residents getting their licences can also be seen when looking at trip rates. While trip rates (all modes) for London residents aged 16-19 and 20-29 have fallen by 27 per cent over the last decade, car trip rates have fallen by 43 and 42 per cent, respectively. The difference is even greater for those aged 30-39, with trip rates falling around a quarter (24 per cent) since 2013/14 and car trip rates falling by 50 per cent.