

# MDA No.: 1718

## Title: Car Clubs

### 1. Executive Summary

- 1.1 At the Transport Committee meeting on 22 January 2025 the Committee resolved that:

*Authority be delegated to the Chair, in consultation with party Group Lead Members, to agree any output arising from the meeting.*

- 1.2 Following consultation with party Group Lead Members, the Chair agreed the Committee's report on Car Clubs, as attached at **Appendix 1**.

### 2. Decision

- 2.1 **That the Chair, in consultation with party Group Lead Members, agrees the Committee's report on Car Clubs, as attached at Appendix 1.**

#### Assembly Member

I confirm that I do not have any disclosable pecuniary interests in the proposed decision and take the decision in compliance with the Code of Conduct for elected Members of the Authority.

The above request has my approval.

**Signature:**



**Printed Name:** Elly Baker AM, Chair of the Transport Committee

**Date:** 28 April 2025

### 3. Decision by an Assembly Member under Delegated Authority

#### Background and proposed next steps:

- 3.1 The terms of reference for this investigation were agreed by the Chair, in consultation with relevant party Group Lead Members and the Deputy Chair, under the standing authority granted to Chairs of Committees and Sub-Committees. Officers confirm that the letter and its recommendations fall within these terms of reference.
- 3.2 The exercise of delegated authority approving the report will be formally noted at the Transport Committee's next appropriate meeting.

#### Confirmation that appropriate delegated authority exists for this decision:

Signature (Committee Services): *Hannah Barlow*

Printed Name: Hannah Barlow, Principal Committee Manager

Date: 10 April 2025

#### Financial Implications: NOT REQUIRED

Note: Finance comments and signature are required only where there are financial implications arising or the potential for financial implications.

Signature (Finance): Not Required

Printed Name:

Date:

#### Legal Implications:

The Chair of the Transport Committee has the power to make the decision set out in this report.

Signature (Legal): *Rory McKenna*

Printed Name: Rory McKenna

Date: 29 April 2025

Email: rory.mckenna@london.gov.uk

#### Supporting Detail / List of Consultees:

- Caroline Russell AM (Deputy Chair)
- Keith Prince AM
- Hina Bokhari OBE AM

#### 4. Public Access to Information

- 4.1 Information in this form (Part 1) is subject to the FoIA, or the EIR and will be made available on the GLA Website, usually within one working day of approval.
- 4.2 If immediate publication risks compromising the implementation of the decision (for example, to complete a procurement process), it can be deferred until a specific date. Deferral periods should be kept to the shortest length strictly necessary.
- 4.3 **Note:** this form (Part 1) will either be published within one working day after it has been approved or on the defer date.

##### **Part 1 - Deferral:**

Is the publication of Part 1 of this approval to be deferred? NO

If yes, until what date:

##### **Part 2 – Sensitive Information:**

Only the facts or advice that would be exempt from disclosure under FoIA or EIR should be included in the separate Part 2 form, together with the legal rationale for non-publication.

Is there a part 2 form? NO

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#### **Lead Officer / Author**

Signature: *Eleanor Haigh*

Printed Name: Eleanor Haigh

Job Title: Senior Policy Advisor

Date: 10 April 2025

#### **Countersigned by Executive Director:**

Signature: *Helen Ewen*

Printed Name: Helen Ewen, Executive Director – Assembly Secretariat

Date: 28 April 2025

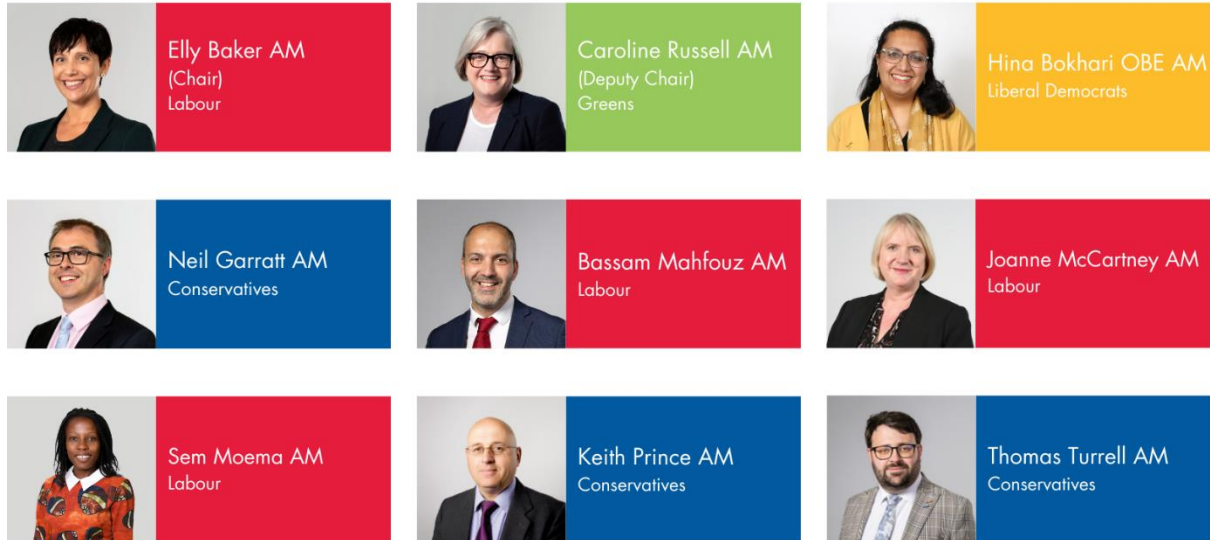
An aerial photograph of several pedestrians walking on a green background that features a faint, light-green map of London. The map shows the River Thames and the surrounding urban grid. The pedestrians are scattered across the frame, some walking in groups and others alone. The overall tone is green, with the map lines providing a subtle pattern.

# TfL's Stalling Car Clubs

## Transport Committee

# LONDON ASSEMBLY

## Transport Committee



This investigation was carried out by the Transport Committee in 2024-25, with Elly Baker AM as Chair.

The Transport Committee examines all aspects of the capital's transport system in order to press for improvements for Londoners. The Committee pays particular attention to how the Mayor's Transport Strategy is being implemented and looks closely at the work of Transport for London and other transport operators.

### Contact us

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## Foreword



**Elly Baker AM**  
**Chair of the Transport Committee**

The question of who drives, and why, is at the heart of a range of challenges London faces.

With limited space in our busy city, and the prospect of moving millions of us around every day for work, family and fun, we must understand what Londoners need their transport to do for them so we can facilitate the right transport mix.

There are many journeys for those of us who don't own cars, or those who own them but don't need to drive regularly, that are still most conveniently done by car, even with our extensive public transport system. When taking journeys with less mobile friends or family, transporting heavy goods, or just any time when the public transport journeys are a genuine challenge, provision of car clubs seems a potential solution. Indeed, those Londoners who are car club members often have positive stories of being able to rely on them in their hour of need.

Yet somehow our progress on expanding car clubs has stalled, especially in areas of London where public transport coverage is less. While the benefits seem obvious when examined – providing access to a car when needed, but without the ongoing financial commitment to the owner, and delivering a positive impact on street space, congestion, pollution and road safety in our city – there just doesn't seem to be any drive to make car clubs a genuine option for more Londoners.

This report has sought to get to the bottom of this contradiction, and found a frustrating inconsistency at its heart – the evidence says *yes*, but the policies say *we're not so sure*.

We hope the work that has gone into this report will provide the impetus needed to take off the handbrake on car clubs in London.

Thank you to everyone who has contributed to this report by providing evidence, including the many Londoners whose informal views on car clubs I've sought over the last few years, the councils and operators making car clubs work, and to all the City Hall staff who have helped the Committee make their way through this surprisingly contested subject.

## Executive Summary

London has the largest operation of car clubs in the UK, with a majority of UK car club users living in London. Yet, there is a lack of awareness of car clubs in London, and very few Londoners use them. And there has been a reduction in the number of car club vehicles available in London over the last three years.

Car clubs are short-term car rental membership services that allow users to access locally parked cars which can be paid for by the minute, hour or day.

There is a wealth of evidence to show that car clubs can reduce private car use and ownership, key targets in the Mayor's Transport Strategy. Car clubs provide an option to enable people to reduce their car use or give up their private car, while still having the confidence that they will be able to access a car for those necessary journeys.

We believe car clubs should form a part of London's integrated transport network, to be used for the types of journeys where walking, cycling or public transport are not suitable.

However, there is currently a patchwork approach to car clubs in London and they are failing to reach their full potential. Councils have been left to create their own strategies for car clubs, which has led to greater provision in some areas than others. This also makes London a very hard city for car club operators to work in, and some have already withdrawn from London.

Without a pan-London car club policy, many of the current barriers faced by users, operators and councils will remain in place. We need to see action from Transport for London (TfL) to establish a pan-London policy on car clubs to enable a more even distribution of car clubs throughout London, make them easier for Londoners to use and raise awareness of car clubs in London.

As it currently stands, we believe TfL is stalling the progression of car clubs in London. If this continues, we are concerned the industry in our city may be in decline.

## Recommendations

### Recommendation 1

In the next London Plan, the Mayor should recognise the important part that car clubs can and should play in London's transport mix. This should include support for car clubs by recognising them as an option that enables people to reduce their car use or give up their private car.

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### Recommendation 2

Within the next 12 months the Mayor should, through TfL and working with London's boroughs, develop and seek to reach agreement on a pan-London action plan for car clubs. This action plan should address the low provision of car clubs in outer London, providing car clubs with equal or lower financial exemptions than private cars, and guidelines on parking bay provision.

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### Recommendation 3

As part of its work on a pan-London action plan for car clubs, TfL should develop and roll out an awareness-raising campaign. To assist in creating a wide and diverse user base, this should inform Londoners on what car clubs are, how they can access them, and the benefits that they provide.

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## Car clubs in London

For the Mayor to achieve his target to reduce car ownership,<sup>1</sup> Londoners must have a range of suitable and sustainable transport options to be able to choose from. Car clubs could play a part in helping the Mayor to make that journey.

Car clubs are short-term car rental membership services that allow users to access locally parked cars, which can be paid for by the minute, hour or day.<sup>2</sup> Four car club operators, all privately owned companies, currently run services in London: Zipcar, Co-Wheels, Enterprise and Hiyacar.<sup>3</sup>

From dropping children off at classes to transporting bulky items of furniture home, car clubs can offer a convenient, cost-effective and flexible means of accessing vehicles on-demand. In written evidence to the Committee, Zipcar estimates car club members could save on average £3,000 per year compared to private car ownership.<sup>4</sup>

In some instances, car clubs may offer the necessary flexibility a household needs to be able to get rid of their privately owned car. CoMoUK, the national charity dedicated to the social, economic and environmental benefits of shared transport, estimated that in London one car club car replaced around 15 private cars in real terms and around 32 private cars when factoring in car purchases that were deferred thanks to car clubs.<sup>5</sup> In written evidence to the Committee, Enterprise argued that car clubs “significantly reduce the need for car ownership” and that car club users report a “significant reduction in their overall car use.”<sup>6</sup> Similarly, Zipcar argued that its model of car sharing “reduces vehicle ownership as well as miles driven”.<sup>7</sup>

Car club vehicles are also often newer and they tend to have lower emissions than private cars, which helps to reduce carbon emissions and air pollution. Co-Wheels told us that 35 per cent of car club vehicles are electric vehicles compared to four per cent of total cars in the UK, and argued this is “opening up access to zero emission vehicles to many people who could not afford to buy them.”<sup>8</sup> In Zipcar’s evidence to the Committee it said that as its vehicles are low or zero emissions they can contribute cleaner air and are contributing to net CO<sub>2</sub> targets.<sup>9</sup>

But it is essential that car clubs are integrated with other transport options and seen as part of an integrated transport network for them to be successful. As Andy Flood, Principal Transport Planner at Richmond and Wandsworth Councils, told the Committee “a car club will not be a properly viable option unless there are the other transport modes around” as people need the

<sup>1</sup> Mayor of London, [Mayor’s Transport Strategy](#), March 2018, p.89

<sup>2</sup> TfL, [Car clubs](#), [accessed 16 April 2025]

<sup>3</sup> CoMoUK, [Existing schemes and operators](#)

<sup>4</sup> Zipcar, [Written evidence on car clubs](#), 14 January 2025, p.1

<sup>5</sup> CoMoUK, [Annual Car Club Report UK 2023](#), 11 June 2024, p.23

<sup>6</sup> Enterprise, [Written evidence on car clubs](#), 22 January 2025, p.1

<sup>7</sup> Zipcar, [Written evidence on car clubs](#), 14 January 2025, p.1

<sup>8</sup> Co Wheels, [Written evidence on car clubs](#), 10 January 2025, p.4

<sup>9</sup> Zipcar, [Written evidence on car clubs](#), 14 January 2025, p.1

confidence that there are multiple transport options available to them, if they are to give up their private car.<sup>10</sup>

London is uniquely well-suited in the UK to hosting car clubs. It has both the population density and alternative transport options (rail, bus, shared mobility) that make car clubs a viable business. London is already home to the vast majority of UK car club users. As of October 2023, there were 258,570 active car club members<sup>11</sup> living in London, which accounted for 76 per cent of all active car club members in the UK.<sup>12</sup>

There may also be room for more growth. Around 650,000 car-owning households in London could give up a private car and switch to car club use according to CoMoUK. It estimates that this could result in 24 million fewer car trips per year, 340 million fewer car miles per year and 300,000 fewer privately owned cars. But, 21,000 additional car club cars would be needed to achieve this.<sup>13</sup>

We heard from Richard Dilks, Chief Executive at CoMoUK, that the current provision and usage of car clubs in London is “not at the level it could be” and that London is a “difficult market to operate in” and “has seen a reduction in the number of operators it has.”<sup>14</sup> Car club operators Zipcar, Co-Wheels, Enterprise and Hiyacar also told us that several car club operators have left the market in London.<sup>15</sup> Co-Wheels argued there has been “a period of contraction in the UK car club market which has seen a number of operators fail or withdraw from the market, especially in London.”<sup>16</sup>

CoMoUK data shows that the number of active car club members and car club vehicles in London has fallen in recent years (Figure 1).

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<sup>10</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.3

<sup>11</sup> An active car club member is defined as members who have renewed their car club membership or made another financial commitment to an operator in the last 12 months. See: CoMoUK, [CoMoUK Annual Car Club Report UK 2023](#), May 2024 and CoMoUK, p.7 and [CoMoUK Annual Car Club Report SCOTLAND](#), 2023, p.7

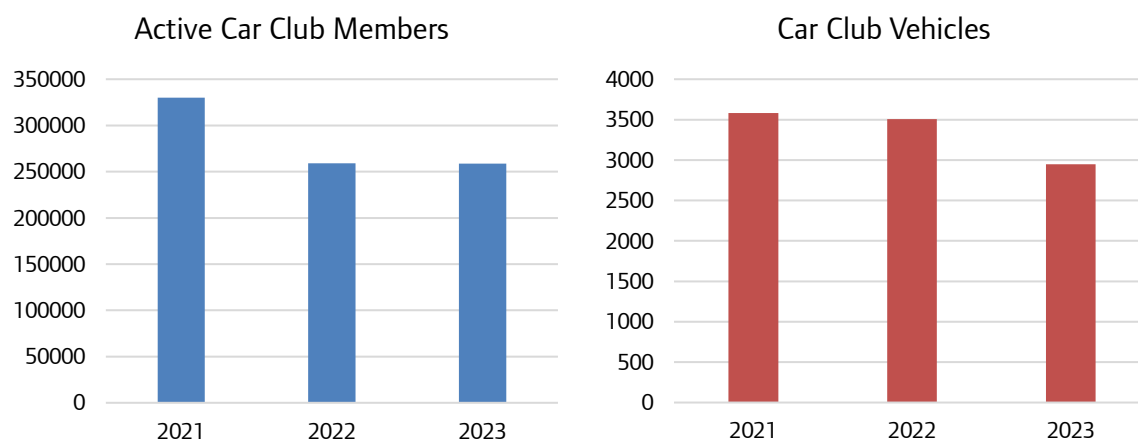
<sup>12</sup> CoMoUK, [CoMoUK Annual Car Club Report UK 2023](#), May 2024, p.7

<sup>13</sup> CoMoUK, [Driving London Forward: how car clubs can help deliver the Mayor's Transport Strategy](#), March 2022, p.3

<sup>14</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.1, p.15

<sup>15</sup> Zipcar, [Written evidence on car clubs](#), 14 January 2025, p.3, see also Co Wheels, [Written evidence on car clubs](#), 10 January 2025, p.1

<sup>16</sup> Co Wheels, [Written evidence on car clubs](#), 10 January 2025, p.1

**Figure 1: Decline of active car club members and car club vehicles from 2021-23<sup>17 18 19</sup>**

This shows a drop of over 70,000 active car club members and just over 600 fewer car club vehicles in London between 2021 and 2023. A fall of 22 percent and 18 per cent respectively.

Andy Flood told the Committee that the provision of car clubs across London has changed since the pandemic. He said: “Before the pandemic, we had a consistent growth in the number of vehicles and a growth in membership. Since the pandemic, we have had a growth in membership but not a growth in the number of vehicles that are available.”<sup>20</sup> Andy Flood also stated that Richmond and Wandsworth have unoccupied car club parking spaces, due to operators reducing the number of vehicles in the area, post-pandemic. Andy Flood added that “operators are not exactly knocking on the doors to say, ‘We want extra vehicles in your area’ at the moment.”<sup>21</sup>

In December 2024, the Committee commissioned a representative survey of 1,053 Londoners in which we sought their views on car clubs. This showed that just over one in ten, 13 per cent, of driving licence holders in London reported ever using car clubs. Even fewer, eight per cent, said they are likely to use a car club in the next year.<sup>22</sup>

Given the potential contribution car clubs could make towards the Mayor’s targets on reducing car ownership and overall vehicle miles in London, and with trends in usage in reverse, the Committee decided to explore the policies and support needed to encourage more Londoners to use car clubs. We were particularly interested to explore the distribution and use of car clubs across London.

<sup>17</sup> CoMoUK, [Car Club Annual Report London 2021](#), 18 May 2022, p.2

<sup>18</sup> CoMoUK, [Car Club Annual Report London 2022](#), 30 June 2023, p.7

<sup>19</sup> CoMoUK, [Annual Car Club Report UK 2023](#), 11 June 2024, p.7

<sup>20</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.9

<sup>21</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.14

<sup>22</sup> London Datastore, [GLA Opinion Research – Car Clubs](#), 13 – 20 December 2024

## How is TfL supporting car clubs

Transport for London (TfL) is not responsible for licensing or regulating car clubs in London. However, it has stated support for them in various policy documents.

In 2014, TfL held an inaugural car club event in London, bringing “boroughs and Car Club industry together to help encourage further growth in London.”<sup>23</sup> In 2015 a *Strategy for Car Clubs* was jointly developed by TfL, London Councils, the GLA and a coalition of car club operators and key stakeholders.<sup>24</sup> The Plan aimed to “grow car clubs into a mainstream alternative to the private car for essential car journeys in London”<sup>25</sup> and grow the membership of car clubs to one million users in London by 2025.<sup>26</sup> In 2023, CoMoUK data showed there were 258,570 active car club members in London.<sup>27</sup>

In 2022, TfL conducted a review of its car club policy and published six commitments, stating it would “work closely with London Councils, boroughs and car club operators and the wider sector to take these forward.”<sup>28</sup> These commitments sit alongside references to car clubs in the Mayor’s Transport Strategy and the London Plan. They are set out below:

### Mayor’s Transport Strategy

“Proposal 19 The Mayor, through TfL and the boroughs, will support the provision of car clubs for residents when paired with a reduction in the availability of private parking, to enable more Londoners to give up their cars while allowing for infrequent car travel in inner and outer London.”<sup>29</sup>

### The London Plan

“Car clubs count towards the maximum parking permitted because they share many of the negative impacts of privately-owned cars. However, in some areas, car club spaces can help support lower parking provision and car-lite lifestyles by enabling multiple households to make infrequent trips by car.”<sup>30</sup>

<sup>23</sup> TfL, [London holds inaugural Car Club event](#), 10 July 2014

<sup>24</sup> TfL, [First pan-London Car Club Action Plan launched](#), 21 May 2015

<sup>25</sup> TfL, [First pan-London Car Club Action Plan launched](#), 21 May 2015

<sup>26</sup> TfL, [First pan-London Car Club Action Plan launched](#), 21 May 2015, see also Car Club Coalition, [A Car Club Strategy for London Growing car clubs to support London’s transport future](#)

<sup>27</sup> CoMoUK, [Annual Car Club Report UK 2023](#), 11 June 2024, p.7

<sup>28</sup> TfL, [Taking TfL’s car club policy forward](#), July 2022, p.4

<sup>29</sup> Mayor of London, [Mayor’s Transport Strategy](#), March 2018, p.89

<sup>30</sup> Mayor of London, [The London Plan](#), March 2021, p.429

### TfL's six commitments on car clubs

1. Work with London Councils, boroughs and industry to encourage data sharing and visualisation to help inform strategic planning and policy development.
2. Ensure car clubs are included in policies and public messages that reference alternatives to car ownership particularly when targeted at area with high car ownership.
3. Support operators and provide opportunities to promote third party offers as part of scrappage schemes to individuals who want to reduce their private car use.
4. Consider and engage with car club operators in the development of any proposals for mobility credits for future road user charging.
5. Support the electrification of car clubs through the roll out of EV charging in London and work with operators to assess the needs of car clubs when implementing charging on TfL/GLA land.
6. Quarterly updates providing progress on the commitments.

In response to a recent Mayoral Question in February 2025, Sir Sadiq Khan described TfL's role as "delivering a level playing field for all car club operators". He went on to say that TfL "is working closely with the operators to fully understand market conditions, and potential next steps to support car clubs further."<sup>31</sup>

### TfL's position on car clubs

The evidence we heard from TfL indicated that its position on car clubs may have shifted. Alina Tuerk, Head of Roads and Freight Strategy at TfL, told the Committee that TfL is concerned about introducing significant numbers of additional car club vehicles as this could "lead to an increased take-up of car trip[s] by those who currently do not own a car".<sup>32</sup>

This was at odds to what other guests told us, especially about the effect car clubs can have on reducing private car use. But also appeared to run contrary to the Mayor's description of TfL's stance on this issue, as set out in response to Mayor's Questions. He said "TfL wants to see car clubs thrive" and that "Car clubs are an important part of the transport mix, and make a valuable contribution to the outcomes of my Transport Strategy."<sup>33</sup> He also said:

<sup>31</sup> Mayor of London, [MQ 2025/0569 - Car clubs \(2\)](#), 28 February 2025

<sup>32</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.4

<sup>33</sup> Mayor of London, [MQ 2025/0570 – Car Clubs \(3\)](#), 25 February 2025

"My Transport Strategy is clear on the important role car clubs can play to reduce the need for private car ownership and parking, and I support their use to enable more Londoners to give up their cars while allowing for infrequent car travel."<sup>34</sup>

Andy Flood, Principal Transport Planner at Richmond and Wandsworth Councils, told us "Every single piece of research that I have seen, including the CoMoUK annual reports and international reports, show that car clubs have a net benefit in terms of reducing car ownership and reducing car use."<sup>35</sup> Moreover, Richard Dilks told the Committee that wider provision and take up of cars clubs had "substantial potential" to encourage modal shift away from private cars.<sup>36</sup> The Committee also heard from the four car club operators in London, Hiyacar, Enterprise, Co-Wheels and Zipcar, that car clubs reduce private car ownership, dependency and use.<sup>37</sup>

Hiyacar told us that car clubs are a "highly efficient tool for reducing car dependency" and argued that this is particularly the case with back to bay car club models.<sup>38</sup> Similarly, Co Wheels argued that "back to base car clubs do not compete with but complement both public transport and active travel."<sup>39</sup> Enterprise Mobility also told us that back to bay car club models have been shown to increase usage of public transport.<sup>40</sup> The back to bay model is when cars must be returned to their unique designated parking place, this is the most common form of car club in the UK.<sup>41</sup> In the one-way or "flex" model, operated in London by Zipcar, the car can be taken on a one-way trip and parked on-street wherever it is legal to do so.<sup>42</sup> Hiyacar argued that these flex models may compete with public transport.<sup>43</sup> Similarly, Enterprise told us that flex car clubs have been shown to reduce use of public transport.<sup>44</sup>

Zipcar told us that car clubs have been proven to change user behaviour by reducing the number of car miles driven, reducing car ownership and increasing use of active travel. It argued:

"[The] key role of car clubs is that it breaks the link with the private car. When you own a private car, for most trips you will default to using the car. The true cost of each individual trip is not really recognised. Car clubs give members confidence that there is a car nearby whenever they need one, for those trips where a car is necessary (44% of survey respondents needed a car club to move heavy or bulky items)."<sup>45</sup>

<sup>34</sup> Mayor of London, [MQ 2025/0569 - Car clubs \(2\)](#), 28 February 2025

<sup>35</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.4

<sup>36</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.2

<sup>37</sup> Hiyacar, [Written evidence on car clubs](#), 20 December 2024, p.1; Enterprise, [Written evidence on car clubs](#), 22 January 2025, p.1; Co Wheels, [Written evidence on car clubs](#), 10 January 2025 p.2; and Zipcar, [Written evidence on car clubs](#), 14 January 2025, p.1-2

<sup>38</sup> Hiyacar, [Written evidence on car clubs](#), 20 December 2024, p.1

<sup>39</sup> Co Wheels, [Written evidence on car clubs](#), 10 January 2025, p.2

<sup>40</sup> Enterprise, [Written evidence on car clubs](#), 22 January 2025, p.1

<sup>41</sup> CoMoUK, [Shared cars overview and benefits](#), [accessed 17 April 2025]

<sup>42</sup> CoMoUK, [Shared cars overview and benefits](#), [accessed 17 April 2025], see also London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.3

<sup>43</sup> Hiyacar, [Written evidence on car clubs](#), 20 December 2024, p.1

<sup>44</sup> Enterprise, [Written evidence on car clubs](#), 22 January 2025, p.1

<sup>45</sup> Zipcar, [Written evidence on car clubs](#), 14 January 2025, p.2

## TfL research on car clubs

We heard from Alina Tuerk that TfL had carried out research into car clubs. She described the results of this research as “quite inconclusive”.<sup>46</sup> This included user research, consisting of a survey and focus groups, and desktop research. Alina Tuerk told the Committee that “The results are really mixed, and we are trying to dig into it a bit deeper to help us shape support for the sector in a way that does support the MTS and does not lead to the opposite effect.”<sup>47</sup>

Following the Committee’s meeting Alina Tuerk wrote to us to share the details and results of TfL’s research. For its desktop research, TfL used nine research papers to help form its position on car clubs.<sup>48</sup> The Committee found upon reviewing these papers that only one stated that there are indicators that car clubs “may” increase private car use.<sup>49</sup> Whereas, five of the papers provided evidence to show that car clubs can positively reduce private car use and/or ownership.<sup>50</sup> The other three papers did not comment directly on the effect of car clubs on private car ownership or use.<sup>51</sup>

TfL said it had also commissioned user research into car club journeys to “gain a full understanding of car clubs in customers’ mode choice to support TfL’s approach to car clubs in London.”<sup>52</sup>

TfL’s user research found that, of those surveyed, 37 per cent of car club users who own private cars stated that they would only consider replacing their car or buying an additional one, as opposed to reducing the number of cars they own.<sup>53</sup> However, CoMoUK data from 2023, shows that only 3 per cent of car club users increased the number of cars they own.<sup>54</sup>

Similarly, TfL’s user research showed that only 1 per cent of car club users who own cars would consider reducing the number of cars they own.<sup>55</sup> Yet, CoMoUK data shows that in 2023, 22 per cent of car club users decreased the number of cars they own.<sup>56</sup>

<sup>46</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.4

<sup>47</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.4

<sup>48</sup> Alina Tuerk, [Letter to Chair of Transport Committee from Head of Londonwide and Regional Strategy](#), 11 March 2025, p.2-3

<sup>49</sup> Anu Tuominen, Antti Rehunen, Juha Peltomaa, Kirsi Mäkinen, [Facilitating practices for sustainable car sharing policies - An integrated approach utilizing user data, urban form variables and mobility patterns](#), September 2019

<sup>50</sup> Aaron Kolleck, [Does Car-Sharing Reduce Car Ownership? Empirical Evidence from Germany](#), July 2021, see also Patrick Jochem, Dominik Frankenhauser, Lukas Ewald, Axel Ensslen, Hansjörg Fromm, [Does free-floating carsharing reduce private vehicle ownership? The case of SHARE NOW in European cities](#), November 2020, Sonja Haustein, [What role does free-floating car sharing play for changes in car ownership? Evidence from longitudinal survey data and population segments in Copenhagen](#), July 2021, Scott Le Vine, John Polak, [The impact of free-floating carsharing on car ownership: Early-stage findings from London](#), March 2019, and Julie Clark, Angela Curl, [Bicycle and Car Share Schemes as Inclusive Modes of Travel? A Socio-Spatial Analysis in Glasgow, UK](#), June 2016

<sup>51</sup> Tom Storme, Jonas De Vos, Leen De Paepe, Frank Witlox, [Limitations to the car-substitution effect of MaaS. Findings from a Belgian pilot study](#), January 2020, see also London Councils, [Londoners’ views on climate change in 2023](#), December 2023, and Jan Schlüter, Johannes Weyer, [Car sharing as a means to raise acceptance of electric vehicles: An empirical study on regime change in automobility](#), January 2019

<sup>52</sup> Alina Tuerk, [Letter to Chair of Transport Committee from Head of Londonwide and Regional Strategy](#), 11 March 2025, p.1

<sup>53</sup> TfL, [TfL 2CV research 2024 Car Clubs](#), August 2024, p.26

<sup>54</sup> CoMoUK, [CoMoUK Annual Car Club Report UK 2023](#), May 2024, p.22

<sup>55</sup> TfL, [TfL 2CV research 2024 Car Clubs](#), August 2024, p.26

<sup>56</sup> CoMoUK, [CoMoUK Annual Car Club Report UK 2023](#), May 2024, p.22

The Committee is unconvinced that TfL is justified in its more recent scepticism of car clubs. The evidence we have heard on the potential for car clubs to help those who are able to, to give up their private car is compelling and persuasive.

TfL's approach to car clubs overlooks the benefits they could provide and how they can support the targets set out in the Mayor's Transport Strategy. TfL's approach should be revisited urgently.

### **Car Club policy in the Mayor's Transport Strategy and London Plan**

Alina Tuerk told the Committee that car clubs are referred to in the Mayor's Transport Strategy and have a role in supporting the Mayor's Transport Strategy key target for 80 per cent of all trips to be made by public transport, walking or cycling. She said:

"The MTS does make this point: there is a role for car clubs within that mix, especially in inner and outer London, but that it should be combined with a substantial reduction in private car parking to help us ensure that we are not ending up in a situation where we are introducing a lot of car clubs to London, and they generate additional car trips for journeys that maybe are a bit more convenient by car rather than by public transport, but that they are actually serving as that stepping stone to a reduction in car ownership. They need to be paired with disincentive for private car use, and then, also very importantly, the other alternatives for the majority of journeys that we would expect someone to make not in a car club car, but by those other modes."<sup>57</sup>

References to car clubs in the Mayor's Transport Strategy and the London Plan are minimal. Richard Dilks told the Committee that the references to car clubs in the Mayor's Transport Strategy are "narrow" and "misguided" in a way that overlooks the benefits they would bring to reducing private car use.<sup>58</sup> Andy Flood echoed this, stating that it would be helpful if TfL documents were more supportive of car clubs.<sup>59</sup>

We heard lots of support for a specific car club policy. Richard Dilks said that he would like to see reference to car clubs in the MTS "in a number of appropriate places and supported policy wise" and that the MTS's narrow view of car clubs should be revised:

"Revision to that, at least revising and improving what is there would be some kind of start, and correcting some of the very odd non-logic that is in there, specifically that, where a car club is mentioned, it is about residential developments and about giving private car owners other options. That is very legitimate, but it is very narrow. Car clubs do not just work well in residential developments and areas, and as I was saying earlier, they do not just serve people who already have private cars. At least getting that sorted would help."<sup>60</sup>

<sup>57</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.1

<sup>58</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.2 and 8

<sup>59</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.15 and 16

<sup>60</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.8

Enterprise also told the Committee that car clubs “should be recognised and defined as a key component of sustainable transport in the London Plan and the Mayor’s Transport Strategy.”<sup>61</sup> Similarly, Andy Flood, Richmond and Wandsworth Councils, said:

“It would be helpful if the London Plan and TfL documents were more supportive in general about car clubs, given the evidence that suggests they contribute to a net reduction in car ownership and car use and therefore would help support the MTS targets.”<sup>62</sup>

Specifically on the London Plan, Andy Flood told the Committee that the wording in the London Plan around car clubs sharing many of the negative impacts of privately owned cars should be revisited. He said:

“I think that is looking at a car club as a car rather than a service that enables people to get rid of a car or use cars less. It would be helpful if that phrasing was reviewed and also just general, more supportive wording around car clubs would be helpful.”<sup>63</sup>

Enterprise also told the Committee that the London Plan should be amended to “include car clubs expansion targets and both car club and rental vehicles should be recognised as official definitions of shared sustainable transport.”<sup>64</sup>

In July 2024, the Committee heard from the Deputy Mayor that the Mayor and TfL have no plan to revise or refresh the current Mayor’s Transport Strategy.<sup>65</sup> But, there is an opportunity for the approach to car clubs to be revisited as part of the preparations for the next London Plan.

## Recommendation 1

In the next London Plan, the Mayor should recognise the important part that car clubs can and should play in London’s transport mix. This should include support for car clubs by recognising them as an option that enables people to reduce their car use or give up their private car.

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## A car club action plan for London

There is not a specific London-wide policy, strategy or action plan focused on car clubs. As a result, Richard Dilks told the Committee that “London lacks a coherent approach of any kind to car clubs as an overall city and entity.”<sup>66</sup> He also said that this has led to boroughs taking on

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<sup>61</sup> Enterprise, [Written evidence on car clubs](#), 22 January 2025, p.1

<sup>62</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.15

<sup>63</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.16

<sup>64</sup> Enterprise, [Written evidence on car clubs](#), 22 January 2025, p.2

<sup>65</sup> London Assembly Transport Committee, [The Mayor’s 2024 Manifesto Commitments and Delivery of the Mayor’s Transport Strategy](#), 10 July 2024, p.1

<sup>66</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.1

responsibility for their areas, creating a “patchwork quilt approach to car club provision in London”.<sup>67</sup>

London Councils has also taken a step back on the issue of car clubs. The Committee approached London Councils to appear at its meeting on 22 January 2025 and was informed that London Councils is no longer active on the car club agenda. This has contributed to boroughs individually directing the approach to car clubs in their own areas.<sup>68</sup>

Richard Dilks told us that there is a role for boroughs and London Councils in supporting the provision of car clubs across London, but that leaving it all up to boroughs is “definitely suboptimal” because they are doing it in a policy vacuum.<sup>69</sup>

The Committee heard from Co-Wheels, a car club operator in London, that this borough-by-borough approach leads to inconsistency:

“with 32 boroughs and the City of London you potentially have 33 different systems, attitudes, pricing and selection policies for car share. It would be better if there were common policies and approach which was positive about encouraging more car share to limit car ownership and had consistent, realistic pricing and permit conditions.”<sup>70</sup>

Richard Dilks suggested that car clubs should have an action plan, similar to TfL’s current action plans on other specific issues.<sup>71</sup> These include the Bus Action Plan, Cycling Action Plan 2 and Vision Zero Action Plan.<sup>72</sup> Richard Dilks said car clubs “needs something coherent that is going to enable TfL officers to work on this” and that coordination should come from TfL as the overall coordinating transport authority.<sup>73</sup>

Richard Dilks pointed out that TfL has recognised the lack of coordination on other forms of shared mobility and “has been making efforts for at least two years now to have a pan-London approach to bike share” yet this coordination is lacking for car clubs.<sup>74</sup>

Similarly, Zipcar told the Committee:

“We need a pan-London approach to car clubs in the same way as is being worked on for shared bikes and already exists for shared e-scooters. This would make growth easier – rather than having to have 32 individual conversations with each borough there would be a central framework that all operators and boroughs sign up to.”<sup>75</sup>

<sup>67</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.6

<sup>68</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.8

<sup>69</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.6

<sup>70</sup> Co Wheels, [Written evidence on car clubs](#), 10 January 2025, p.3

<sup>71</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.8

<sup>72</sup> TfL, [The Mayor’s Transport Strategy](#), [accessed 16 April 2025]

<sup>73</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.8

<sup>74</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.8

<sup>75</sup> Zipcar, [Written evidence on car clubs](#), 14 January 2025, p.3

Richard Dilks told the Committee there are several examples of other countries that have more coherent policies on car clubs. He said these cities all have “common traits of taking car clubs seriously alongside other forms of shared mobility, taking those seriously alongside public transport, alongside active travel”.<sup>76</sup> Richard Dilks told us that Belgium, France, Norway and Germany are all strong in this area, and gave the specific example of Lyon in France. He said that while Lyon is “many multiples smaller than London” it has a “plan for a municipal car club, which would be the same size as London’s total car club fleet.”<sup>77</sup> He said:

“There are various reports that compare European nations against each other on this, European cities, and sadly the UK and London, while to an extent is an improving picture, it is not top-drawer on any of this stuff. London is Europe’s largest city, therefore I would argue it should be doing a whole chunk better than it is.”<sup>78</sup>

We heard that a pan-London car club policy would eliminate some of the common barriers that are halting progression, so that:

- areas of low car club provision, particularly outer London, could be subsidised by areas with high revenue, allowing a more even distribution of car clubs throughout London;
- a standard financial model could be created so that car club vehicles receive equal or better exemptions than those private cars receive, such as Congestion Charge discounts, lower parking permit fees, and VAT discounts for electric charging;
- there is clear guidance to councils on allocating dedicated car club parking bays.<sup>79 80</sup>

However, Alina Tuerk told the Committee TfL has no plan to develop a car club action plan. She said it would be “more helpful” to focus on refreshing TfL’s six commitments with “more of a co-creation approach” working closely with CoMoUK and operators.<sup>81</sup>

Given TfL’s position does not align with the rest of the sector, we are not convinced a co-creation approach will address the barriers to wider rollout and uptake of car clubs. Instead, we believe TfL should develop a specific action plan for car clubs that is more supportive and recognises the benefits back to base car clubs can bring as part of an integrated transport network. This should include measures that address the patchwork coverage across London.

## Recommendation 2

Within the next 12 months the Mayor should, through TfL and working with London’s boroughs, develop and seek to reach agreement on a pan-London action plan for car clubs. This action plan should address the low provision of car clubs in outer London, providing car clubs with equal or lower financial exemptions than private cars, and guidelines on parking bay provision.

<sup>76</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.10

<sup>77</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.12

<sup>78</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.12

<sup>79</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.9-11

<sup>80</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.10

<sup>81</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.19

## Promotion of Car Clubs

Many Londoners appear to be unaware of the benefits of car clubs or how to use them.

Alina Tuerk acknowledged that there is a lack of public understanding on car clubs and people will not consider them as an option if they “do not understand how it works”.<sup>82</sup> TfL’s user research, shared with the Committee, also confirmed that there is a poor understanding of car clubs amongst Londoners, with 31 per cent of its respondents stating that they had never heard of car clubs.<sup>83</sup>

This was reflected in our own research. A survey commissioned by this Committee showed that 33 per cent of Londoners with a driving licence had not heard of car clubs, and only four per cent stated they knew a lot about them.<sup>84</sup> The survey also showed that when non- or infrequent users were asked why they do not use car clubs more frequently, 15 per cent of respondents stated they did not know enough about them.<sup>85</sup>

Alina Tuerk told the Committee that TfL has done some work around improving communications about car clubs. She gave the example of the Ultra Low Emission Zone (ULEZ) expansion scrappage scheme and said that there were limited communications around car clubs for the first ULEZ expansion to inner London, but that following feedback “we really did try to provide more offers and also improve the communication around that for the expansion to outer London.”<sup>86</sup> She also said that TfL is currently evaluating that scheme, and its take-up, and will be reporting on this shortly.

Richard Dilks told us that promotion needed to be aimed at people who had not yet tried car clubs:

“The challenge with car clubs, it seems to be right across shared transport, it is not really getting people to like the stuff once they have tried it because 80 per cent plus satisfaction ratings are what we find every year and we [have] for years. We used to do London specific reports, same story. It is much more challenging getting them to try it in the first place and experiment with it and see how it can fit in their lives, what it can do for them.”<sup>87</sup>

The Committee heard that more needs to be done to promote car clubs London-wide, and that the Mayor and TfL are in a unique position to do this on a pan-London basis. Cllr Averil Lekau from the Royal Borough of Greenwich told the Committee that “We need to have London-wide publicity around the efficacy of car clubs and how they can reduce car ownership.”<sup>88</sup> This point was also made by Richard Dilks and Andy Flood, the latter of whom added that “Because of the

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<sup>82</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.10

<sup>83</sup> TfL, [TfL 2CV research 2024 Car Clubs](#), August 2024, p.6

<sup>84</sup> London Datastore, [GLA Opinion Research – Car Clubs](#), 13 – 20 December 2024

<sup>85</sup> The respondents to this question were Londoners who have a driving licence and had heard of car clubs, but either don’t use car clubs or use them less than once a year.

<sup>86</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.4

<sup>87</sup> London Assembly Transport Committee, [Car Clubs – Panel 1](#), 22 January 2025, p.6

<sup>88</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.2-3

pan-London role that the Mayor and TfL have, this marketing thing is something that is best handled on a TfL/Greater London Authority basis rather than individual boroughs.”<sup>89</sup>

Yet, Alina Tuerk, TfL, stated that she does “not think a big communications campaign on car clubs themselves without something else to hook it on to would necessarily work.”<sup>90</sup>

We agree. That is why the Committee would like to see TfL work on an action plan for car clubs. With a more positive and supportive, approach to car clubs, TfL could then leverage its pan-London reach to promote car clubs and their benefits to Londoners across its network.

### **Recommendation 3**

As part of its work on a pan-London action plan for car clubs, TfL should develop and roll out an awareness-raising campaign. To assist in creating a wide and diverse user base, this should inform Londoners on what car clubs are, how they can access them, and the benefits that they provide.

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<sup>89</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.17

<sup>90</sup> London Assembly Transport Committee, [Car Clubs – Panel 2](#), 22 January 2025, p.8

## Committee Activity

The Transport Committee held its meeting on car clubs on 22 January 2025 with the following guests:

- **Richard Dilks**, Chief Executive, CoMoUK
- **Andy Flood**, Principal Transport Planner, Richmond and Wandsworth Councils
- **Councillor Averil Lekau**, Deputy Leader and Cabinet Member for Climate Action, Sustainability and Transport, Royal Borough of Greenwich
- **Alina Tuerk**, Head of Roads & Freight Strategy, TfL

**Written evidence:** The Committee wrote to car club operators in London, Europcar, Hiyacar, Zipcar, Co-Wheels and Enterprise, to seek their views on the distribution and use of car clubs in London, car clubs' role in sustainable transport, policies needed to support car clubs and the main challenges around car clubs. We received responses from Hiyacar, Zipcar, Co-Wheels and Enterprise.

After the meeting on the 22 January 2025, Alina Tuerk wrote to the Committee providing the results of car club user research TfL conducted in August 2024, and the details of desktop research and a literature review TfL undertook on car clubs.

**Survey:** The Committee commissioned an online survey through the GLA City Intelligence Unit with YouGov, which ran between the 13 – 20 December and received 1,053 responses from Londoners aged 18+. Questions in the survey focused on private car ownership and awareness and use of car clubs. The results were weighted to be representative of all London adults.

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