

Proposed London Low Emission Zone

Final Report

**Research Study Conducted for
Transport for London**



April 2007

Contents

Executive summary	1
Introduction	1
Londoners	1
Businesses	2
Transport Operators	2
Comparison between the 2006 and 2007 surveys	2
Overview	3
Introduction	4
Background	4
Research objectives	5
Methodology	6
Main comparative findings	8
Awareness of the proposed LEZ	8
Awareness of the consultation	9
Support for the proposed LEZ	10
Vehicles to which the LEZ should apply	11
Support for the proposed charge	12
Main findings: Londoners	15
Air quality in London	15
Awareness of the proposed LEZ	17
Awareness of the LEZ consultation	18
Support for the proposed LEZ	19
Vehicles to which the LEZ should apply	22
Support for the proposed charge	24
Other ways to reduce road traffic pollution	27
Main findings: Businesses and Operators	28
Air quality in London	28
Awareness of the proposed LEZ	29
Awareness of the LEZ consultation	30
Support for the proposed LEZ	31
Vehicles to which the LEZ should apply	33
Awareness of Euro Standards	36
Support for proposed Euro III and Euro IV Emission Standards	37
Support for the proposed charge	38
Effect of the charge on businesses	41
Other ways to reduce road traffic pollution	43
Comparison of 2006 and 2007 findings	44
Londoners	44
Businesses/Operators	50

Appendices

Sample profiles

Public Topline Data

Business / Operator Topline Data

Statistical reliability

Borough Analysis

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Executive summary

Introduction

Transport for London is proposing to introduce a Low Emission Zone (LEZ) to improve air quality in Greater London and to help London work towards meeting its national and European Union (EU) targets to improve air quality. To comply with the proposed LEZ, operators would be required to reduce their emissions by either replacing or modifying their older diesel-engined vehicles that do not meet the proposed emission standards. Operators not complying with the proposed standards would have to pay a substantial daily charge to drive within the zone.

Surveys amongst businesses within Greater London (400 interviews), transport operators currently travelling within Greater London (600 interviews), and Greater London residents (1,000 interviews) were conducted via telephone from a centrally located Ipsos MORI telephone interviewing centre during January 2007.

The primary aim of this study is to identify attitudes and opinions of residents in Greater London, as well as the wider business community, towards the proposal and to assess how representative the findings of the public and stakeholder consultation on the proposed LEZ Scheme Order are. A secondary objective is to compare the findings with a similar survey conducted in March 2006.

Londoners

Over two in five residents (42%) think that air quality in London is poor and half believe that air pollution affects them or their family.

Nearly half (47%) are aware of the proposed LEZ and a quarter (26%) are aware of TfL's consultation on it. Once informed of the proposal, three-quarters of residents support the proposed LEZ and think that it is a good idea. Nearly eight in ten residents (77%) believe that the proposal for older vehicles to require modification is reasonable, with support for the LEZ to apply to all vehicles, especially HGVs. One third (35%) of Londoners support the proposed daily charge of £200 for HGVs, buses and coaches, with a slightly higher proportion (43%) supporting the proposed daily charge of £100 for minibuses and LGVs. Preference for the option of a daily charge (47%) is higher than an outright ban on older vehicles that do not meet the proposed LEZ emission standards (30%).

Residents with cars in their household are slightly more aware of the LEZ (50%) and are less likely to think it should apply to all types of vehicles. Residents who have health problems that are aggravated by air pollution are more likely to support the proposed LEZ (80%) and think that it should be applied to all types of vehicles. These residents are also more likely to think that London's air quality is poor (56%) and think that air pollution affects them or their family (79%).

Businesses

Similar to the general public, half of businesses (46%) within Greater London were previously aware of the LEZ, with 23% aware of TfL's consultation. Once informed of the proposal, seven in ten businesses (69%) support the proposed LEZ, with 74% believing that the proposal requiring older vehicles to be modified is reasonable. There is support for the scheme to apply to all types of vehicles, ranging from 84% for HGVs and 79% for buses, through to 49% for heavier cars and 41% for other diesel cars. Businesses are divided on whether there should be an outright ban (36%) or a daily charge (35%). For vehicles not meeting the emissions standard, a third of businesses support the £200 daily charge for HGVs buses and coaches (33%) and the £100 daily charge for LGVs and minibuses (36%).

Transport Operators

Awareness of the proposed LEZ among operators is high (77% at least vaguely aware), with half (47%) aware of the consultation. Operators are also significantly more likely to have heard of Euro emission standards (64%) than businesses (11%).

Operator opinion is divided over the LEZ, with 45% of operators supporting it and 40% in opposition. Six in ten think that the proposal for all diesel HGVs, buses and coaches manufactured before 2001 to require modification to meet the proposed emission standard is reasonable, while 36% feel it is too severe. Around one in five operators (19%) support the £200 daily charge for HGVs, buses and coaches and the £100 charge for LGVs and minibuses (23%). Operators are more likely to prefer a Charge (33%) as opposed to a ban (22%). However when asked which they would prefer, two in five (43%) want neither option.

Two-thirds of operators think that they would be affected by the daily charge, with 39% thinking that the main impact would be an increased cost to make deliveries. One in five (22%) said they would make fewer journeys within Greater London, and 21% said they would pay the charge.

Awareness of the LEZ, the consultation and euro standards is higher amongst operators outside of Greater London. They are also more likely to support the scheme and be more receptive to the idea of it applying to all types of vehicles. However, operators within Greater London are more likely to be supportive of the £200 charge.

Comparison between the 2006 and 2007 surveys

Awareness of the LEZ and TfL's consultation is higher for Londoners in 2007, when TfL consulted on the proposed LEZ Scheme Order, than in 2006. 2006 was when TfL consulted on Revisions to the Mayor's Air Quality and Transport Strategies. However, support for the proposed LEZ has slightly decreased among London residents; London residents are now slightly more likely to think that the charge is too severe (10% in 2006 versus 14% in 2007).

Among businesses and operators, awareness of and attitudes towards the LEZ have largely remained consistent over the year. The only significant differences in attitudes are that in 2007 operators are more likely to think that the proposal for pre-2001 vehicles to be modified to meet the standards is reasonable (52% versus 60%) and are more supportive of the use of Euro standards for the LEZ (43%

versus 56%). This may relate in part to the change in the proposals following the 2006 consultation to defer the tightening of the Euro IV emissions standard from 2010 to 2012.

Overview

Across 2006 and 2007, operators are the most knowledgeable about both the proposed LEZ and TfL's consultation, with London residents the least knowledgeable. Both Londoners and businesses are much more supportive of the LEZ than operators and are more likely to think that the proposal for older vehicles to be modified is reasonable. Support for the level of daily charge is higher among businesses and Londoners than among operators; however for all three groups overall support for the proposed LEZ is higher than support for the daily charges. There has been little change in awareness and attitudes between 2006 and 2007 with the most notable differences amongst London residents, whose views towards the LEZ are slightly more negative than they were a year ago. Londoners are more likely than businesses and operators to support the notion that the LEZ should apply to all vehicles.

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Introduction

Background

The Government has set objectives to reduce nine main air pollutants. Two of these pollutants, ozone and polycyclic aromatic hydrocarbons, are being tackled at national and European level and local action is not specifically required. Within London, the Mayor has a statutory duty to take steps towards achieving the objectives for the remaining seven pollutants. London is expected to meet the objectives for five of these seven pollutants, namely benzene, 1,3-butadiene, carbon monoxide, lead and sulphur dioxide. However, the national air quality objectives for particulate matter (PM₁₀) and nitrogen dioxide (NO₂), which were to be met by 2004 and 2005, are currently being exceeded in London. Consequently the impact of these pollutants on human health is of concern in London. The proposed London Low Emission Zone (LEZ), is considered the most effective option for helping London work towards its air quality objectives'

The objectives of the proposed LEZ are two-fold:

- to move London closer to achieving Air Quality objectives (and EU limit values), in support of the Government's National Air Quality Strategy and the EU's Air Quality Framework and daughter Directives.
- to improve the health and quality of life of people who live and work in London, through improving air quality.

The introduction of the proposed LEZ required revisions to the Mayor's Transport and Air Quality Strategies. The Mayor delegated to TfL responsibility for preparing and consulting on these Strategy Revisions and a period of public and stakeholder consultation ran from 30 January to 24 April 2006. The Mayor subsequently published revisions to his Transport and Air Quality Strategy Revisions in July 2006. In November 2006 TfL subsequently upon detailed scheme proposals as set out in a Scheme Order. This second public and stakeholder consultation on the LEZ Scheme Order ran from 14 November 2006 to 2 February 2007.

The documentation accompanying the public and stakeholder consultation on the scheme order set out the detailed LEZ proposals, including which vehicles would be affected by the proposed LEZ emission standards. The LEZ would apply to certain vehicles driving within Greater London, including vehicles registered outside the UK. There is no intention to target cars within the LEZ, though the Mayor has asked TfL to consider their inclusion at a later date. From 2008, the proposed LEZ would affect Heavy Goods Vehicles (HGVs), buses and coaches and would be extended from 2010 to cover heavier Light Goods Vehicles (LGVs) and minibuses.

From 2008 it is proposed that emission standards would be set for HGVs, buses and coaches. The proposed LEZ emission standards are based on 'Euro standards', which are standards that apply to the exhaust emissions of newly manufactured diesel vehicles sold in the European Union, and which they must meet from a certain date. Euro I was introduced for vehicles subject to a heavy duty cycle from 1 October 1993, and the emission standards have become progressively more stringent for both heavy and light duty cycle diesel vehicles since.

In 2008, the proposed emission standard for the LEZ is Euro III for PM, which came into force on 1st October 2001. This would allow all Euro III and above vehicles to operate in the proposed LEZ without being subject to a charge. In addition, pre-Euro III vehicles would be allowed to operate in the zone without charge if they had taken steps to meet the Euro III standard for particulates, for example, by fitting appropriate abatement equipment.

In 2012, the proposed emission standard is Euro IV for PM which came into force from October 2006. This would allow all Euro IV and above vehicles to operate within the zone without charge. Once again, pre-Euro IV vehicles would be allowed to operate in the zone without charge if they had taken steps to meet the Euro IV standard for particulates.

In 2010, heavier diesel LGVs and minibuses would be included within the proposed LEZ. The standard for these vehicles would be Euro 3 for PM, which came into force in January 2002. This would allow Euro 3 and above vehicles to operate in the proposed LEZ without a charge. In addition, pre-Euro 3 vehicles would be allowed to operate in the zone without charge if they had taken steps to meet the Euro 3 standard for particulates, for example, by fitting appropriate abatement equipment.

Operators wishing to drive vehicles within the zone that do not meet the proposed emission standards of the LEZ could still do so but would be required to pay a substantial daily charge. This is proposed to be set at £200 per day for HGVs, buses and coaches and £100 per day for heavier LGVs and minibuses. Operators with non-compliant vehicles that do not pay the daily charge for driving within Greater London would incur a penalty charge. This would be £1000 (reduced to £500 if paid within 14 days) for HGVs, buses and coaches and £500 (reduced to £250 if paid within 14 days) for heavier LGVs and minibuses.

Research objectives

This attitudinal study was carried out during the public and stakeholder consultation (January 2007) on a LEZ Scheme Order which set out detailed proposals for a LEZ in London. A similar study was carried out in March 2006 during the consultation on revisions to the Mayor's Transport and Air Quality Strategies to allow for a LEZ in London.

The primary aim of the research was to identify attitudes and opinions of residents in Greater London, as well as the wider business community, towards the proposal and to assess how representative the consultation findings are.

The secondary objective was to compare how, if at all, attitudes have changed from when the first survey was conducted in March 2006.

Methodology

A survey amongst businesses within Greater London¹, transport operators currently travelling within Greater London, and Greater London residents was conducted via telephone from a centrally located Ipsos MORI telephone interviewing centre. All interviews were conducted between 3rd and 31st January 2007.

Residents

Residents are defined as young people and adults who currently live within Greater London. Respondents were asked their postcode and this was used to automatically check which London borough they lived in. One thousand interviews were conducted in total and quotas were set by gender, age, ethnicity and borough to reflect the known population profile of Greater London. (See Appendix I for the profile by gender, age and ethnicity).

Businesses

Businesses are defined as businesses that have their company headquarters or any regional offices within Greater London. Respondents were asked their postcode and this was used to automatically check which London borough the business was located in. In each case, Ipsos MORI interviewed the person involved in making financial decisions that could affect the company or the services that they offer. Four hundred interviews were conducted with businesses and quotas were set by business type and number of employees within the business. (See Appendix I for the profile by business type and number of employees.)

Within this study, the definition of businesses excludes any company that operates vehicles in scope of the LEZ (small HGVs (3.5-7.4 tonnes), medium HGVs (7.5-12 tonnes), large HGVs (over 12 tonnes), minibuses, coaches or heavier vans (1.2-3.4 tonnes)). If a business did operate one of these vehicles then were classified as an operator. This differs from the first study, when the classification of businesses included some that operated vehicles which would be included within the LEZ (i.e. prior to the decision to include heavier LGVs in the LEZ). The decision was taken to exclude businesses that also operate at least one vehicle which would be included in the LEZ from the business sample as it was felt that their attitudes towards the scheme were more likely to be aligned to operators in general than businesses which hold no direct responsibility for a vehicle which would be included in the scheme.

¹ Greater London is defined as within any of the 33 London Boroughs.

Operators

Operators are defined as organisations that operate HGVs, minibuses, coaches or LGVs in Greater London at least once every two weeks. In each case, the person involved in making financial decisions that could affect their company or the services that they offer was interviewed. Six hundred interviews were conducted amongst operators, with quotas set by type of operator, fleet size, type of vehicle and location. (See Appendix I for the profile by operator type and fleet size.)

Questionnaire design

Two questionnaires were designed by Ipsos MORI in consultation with TfL (one for residents and one for businesses/operators). The public questionnaire is provided in Appendix II and the business questionnaire provided in Appendix III. Both questionnaires show the topline, aggregate findings from the surveys.

A pilot study was conducted on the 5th and 6th December 2006 to test both questionnaires, with some changes made to the questionnaire as a result.

Weighting

Weighting is carried out at the analysis stage to overcome the problem of possible biases in aggregate results. Such biases may result from the over-representation of certain sub-groups (e.g. men, older people etc) and the under-representation of others. Weighting is necessary to iron-out any potential biases in the results, which exist despite sample selection being balanced to ensure that the sample profile equates to the population profile.

Weighting has been applied to the residents' survey by gender, age and ethnicity. Data was weighted by the profile of adults in Greater London at the 2001 census, as in the table below.

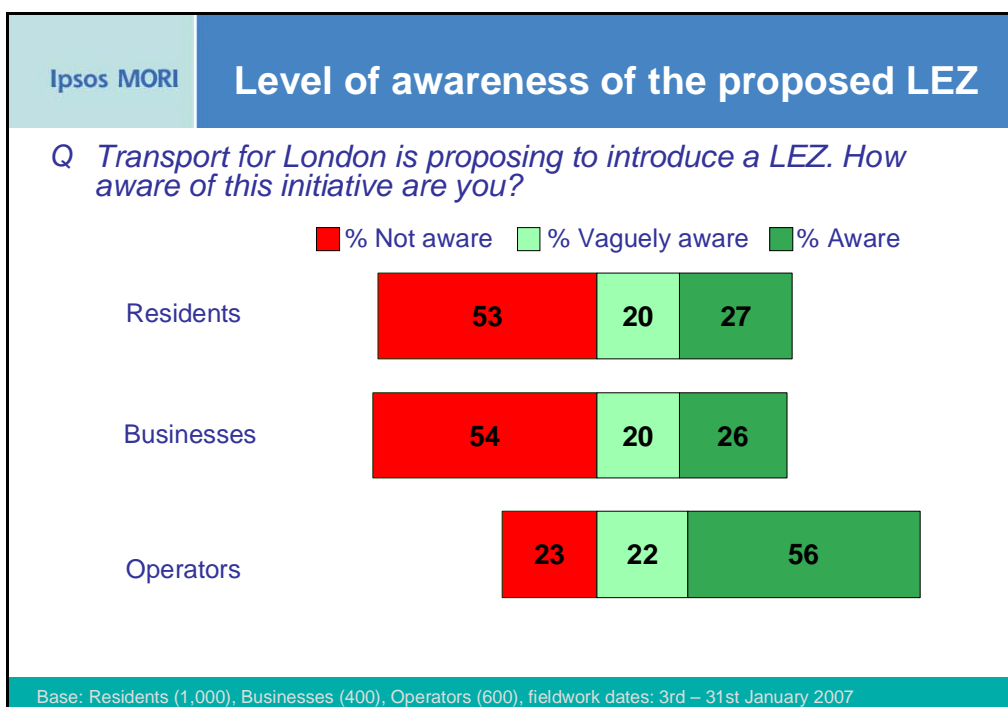
Weighting applied by 2001 census in London	
Men (16+)	47.69%
Women (16+)	52.31%
16-24	15.11%
25-44	44.25%
45-64	25.06%
65 plus	15.58%
White	71.15%
Black and Minority Ethnic (BAME)	28.85%

Source: Census 2001

Main comparative findings

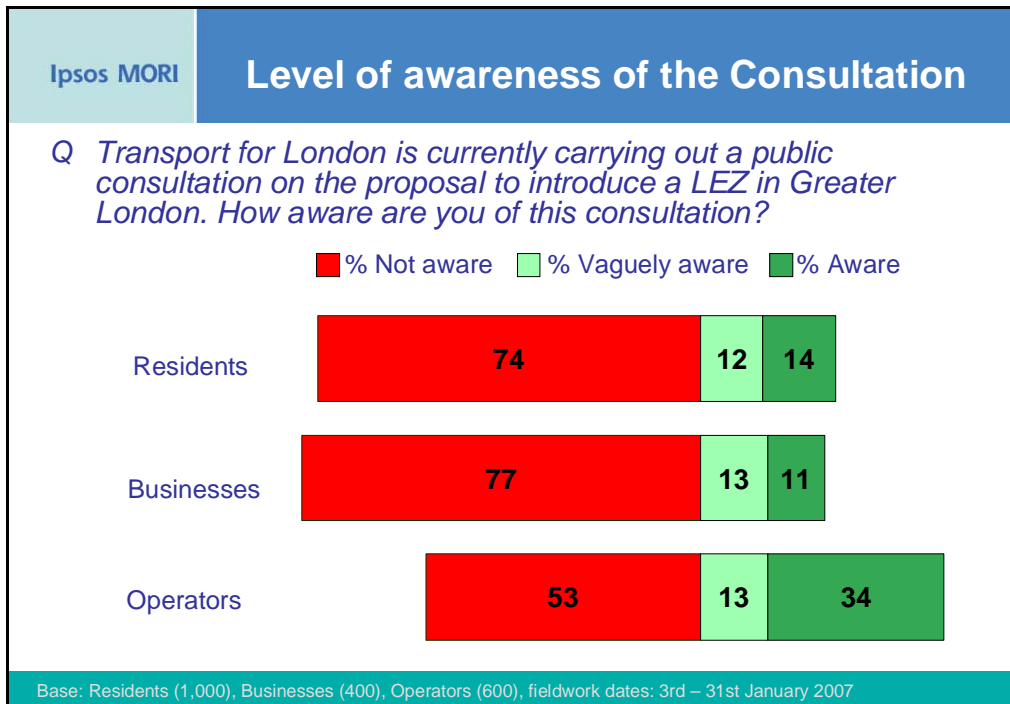
Awareness of the proposed LEZ

Just over half of operators (56%) are aware of the proposed LEZ and a further 22% are vaguely aware. Operators outside of Greater London are more likely to be aware than operators within Greater London (59% outside Greater London are aware compared with 46% inside Greater London). As can be seen in the chart below, awareness of the LEZ amongst Greater London residents and businesses is lower, with a quarter being aware and 20% vaguely aware of it.



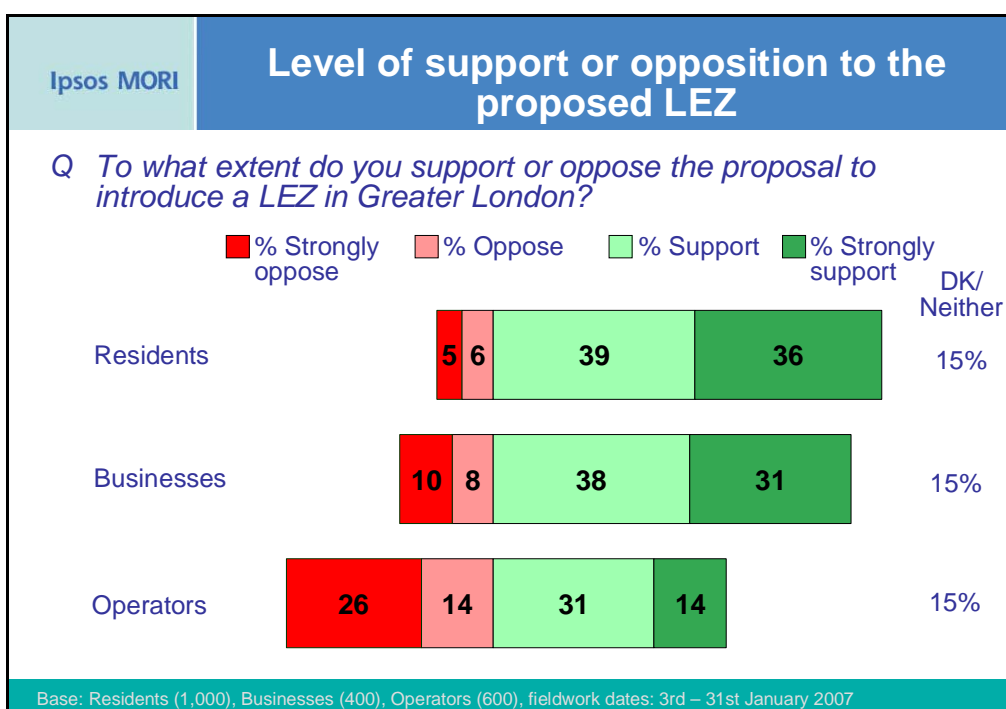
Awareness of the consultation

Across all three groups, awareness of the scheme or consultation is lower than awareness of the proposed LEZ. Just under half (47%) of operators are aware/vaguely aware of the consultation, irrespective of whether they are in or outside of Greater London. This compares with a quarter of Businesses (23%) and residents (26%) who are aware/vaguely aware of the consultation.

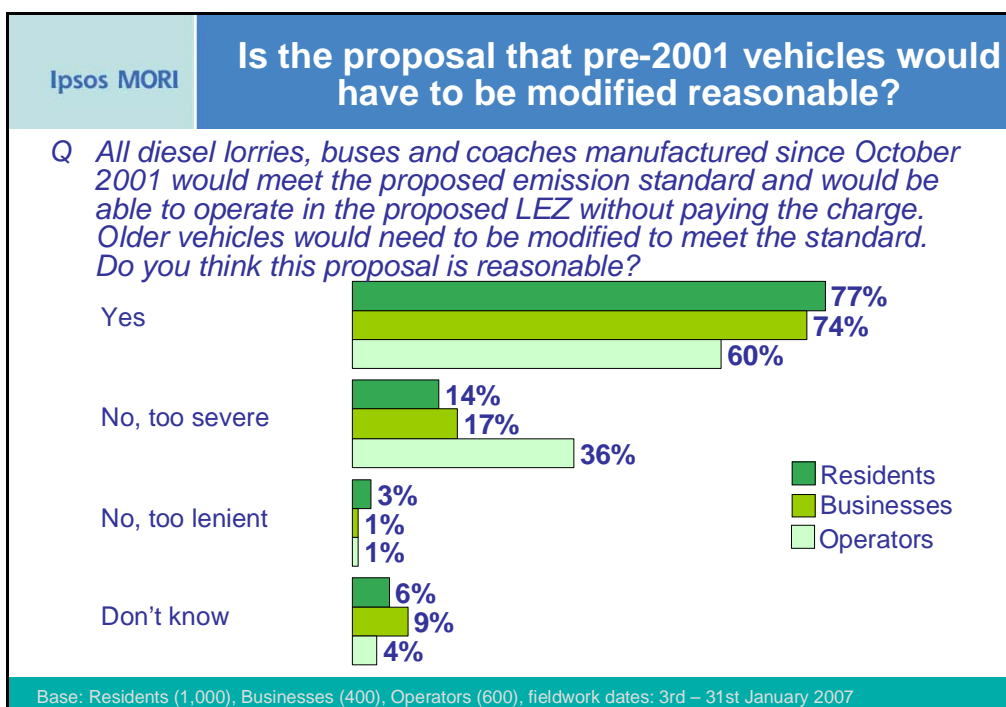


Support for the proposed LEZ

While awareness of the proposed LEZ is higher among operators than businesses and residents, support for it is lower. Three-quarters of residents support the proposed LEZ (including 36% who strongly support it) and seven in ten (69%) businesses support it. This compares with just under half (45%) of operators who support the proposed LEZ and four in ten who oppose it, including a quarter (26%) who strongly oppose.



Around three-quarters of residents and businesses believe that the proposal that pre-2001 HGVs, buses and coaches would need to be modified to meet the standard is reasonable compared to six in ten operators, with over a third (36%) of operators thinking that this is too severe.



Vehicles to which the LEZ should apply

The vast majority of residents (85%) and businesses (84%) believe that the proposed LEZ should apply to HGVs, while this is the opinion of 70% of operators. Operators (16%) are also more likely than residents (4%) and businesses (6%) to think that it shouldn't apply to any vehicles.

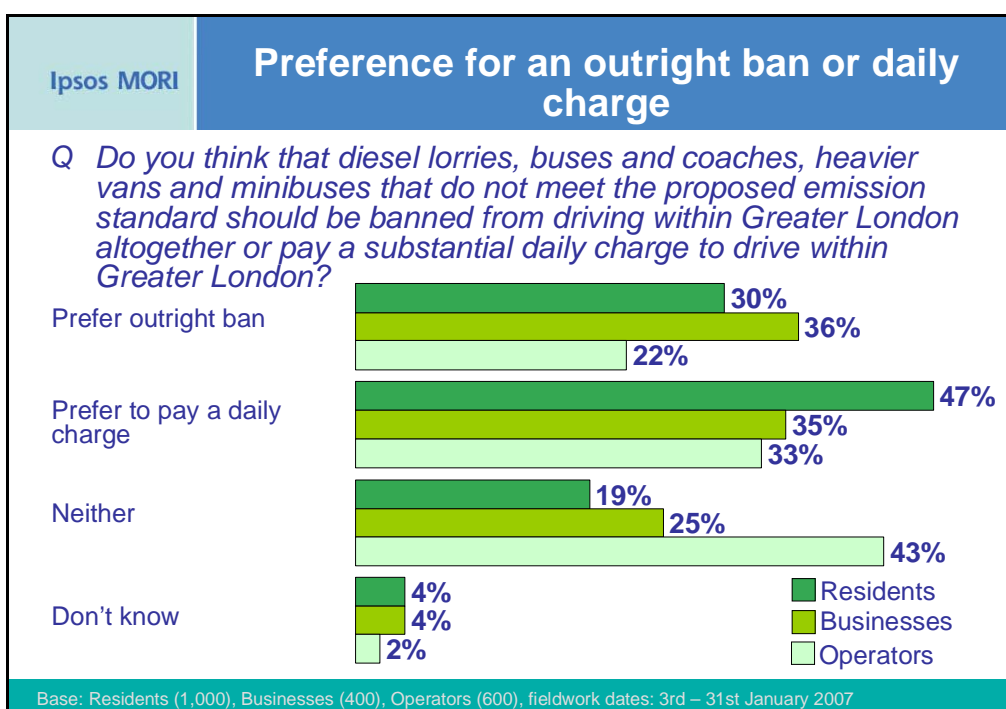
It is proposed that diesel engine HGVs, buses and coaches would be included within the LEZ from 2008 and heavier diesel engine vans and minibuses from 2010. Which of the following vehicles, if any do you think should be included?

	Residents %	Businesses %	Operators %
HGVs	85	84	70
Heavier diesel engine vans	80	76	67
Coaches	78	81	74
Buses	76	79	77
Minibuses	62	68	66
None of these	4	6	16
Don't Know	2	5	2

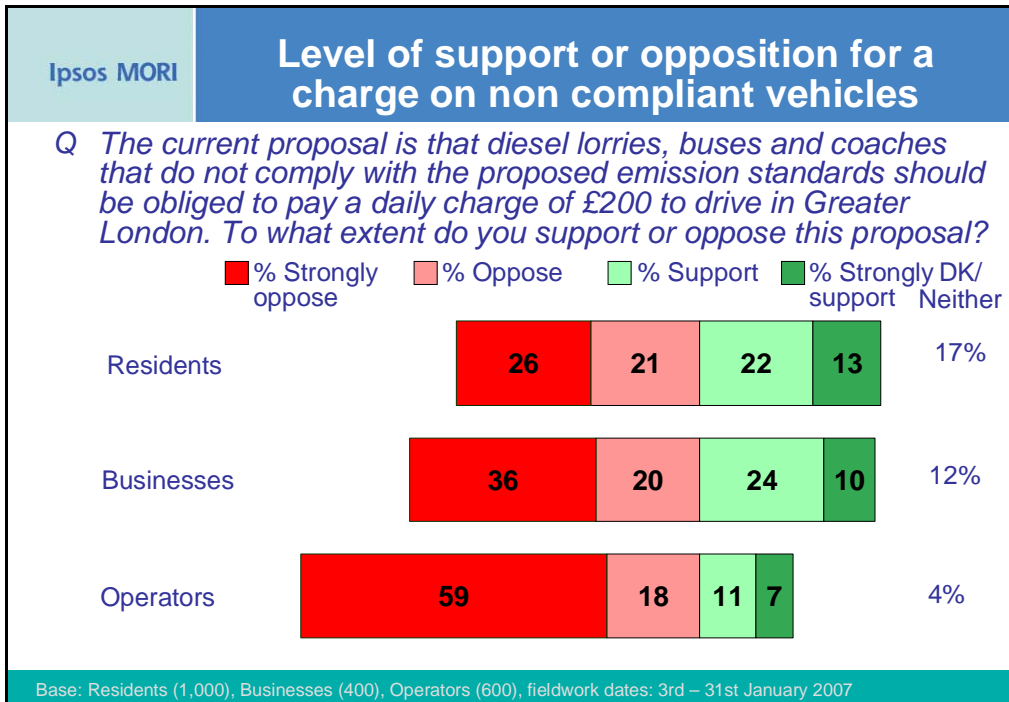
Source: Ipsos MORI

Support for the proposed charge

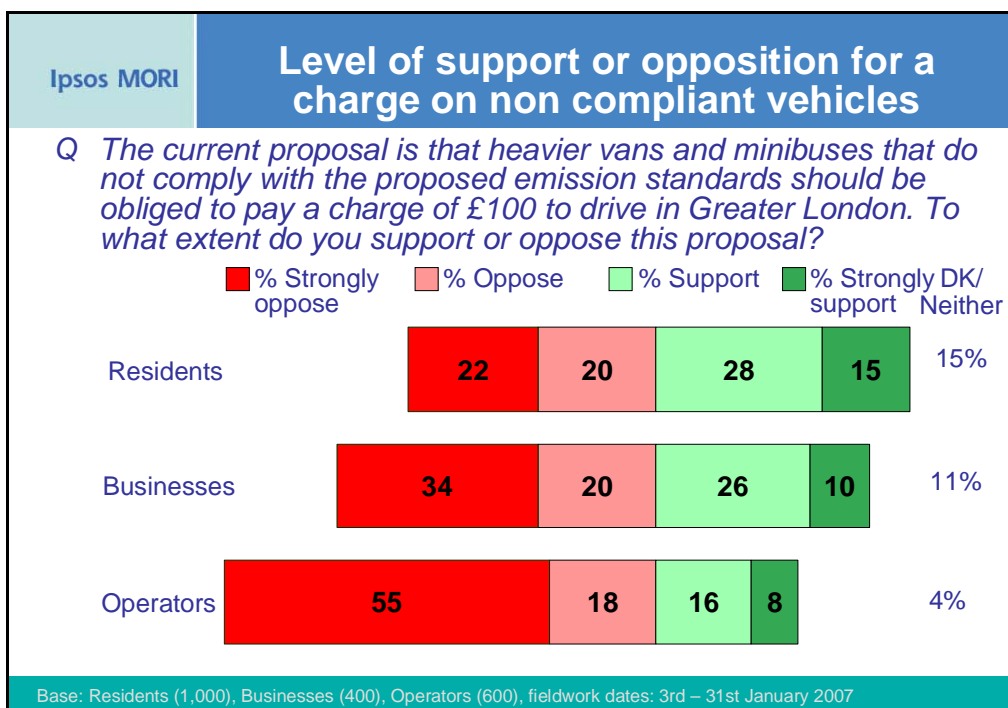
Around a third of residents and businesses would prefer an outright ban on non-compliant vehicles, rather than allowing them to pay a charge to drive within Greater London. Around a third of businesses would prefer to a daily charge to a ban, as would a third of operators. 47 % of residents would prefer a daily charge. Operators are more likely to support neither option (43%) and give less support towards an outright ban (22%).



All were asked if they support or oppose the proposition that diesel lorries, buses and coaches that do not conform with the emissions standards would have to pay a daily charge of £200 to drive within Greater London. The majority of operators (78%) oppose the proposal, including six in ten (59%) who strongly oppose it. One in five (19%) of operators support this proposition, including 7% who strongly support it. Support for the proposal is slightly higher for operators in, rather than outside of, Greater London (24% compared with 16%). Support for the proposal is higher among businesses (33%) and residents (35%) than operators.



All were then asked if they support or oppose the proposition that heavier vans and minibuses that are not compliant with the LEZ standard would have to pay a daily charge of £100 to drive within Greater London. Nearly a quarter of operators (23%) support this proposition, including 8% who strongly support it. However, significantly more operators (73%) oppose the proposal, including over half (55%) who strongly oppose it. Support for the proposal is higher among businesses and residents than operators (36% businesses and 43% residents support the proposition).



Main findings: Londoners

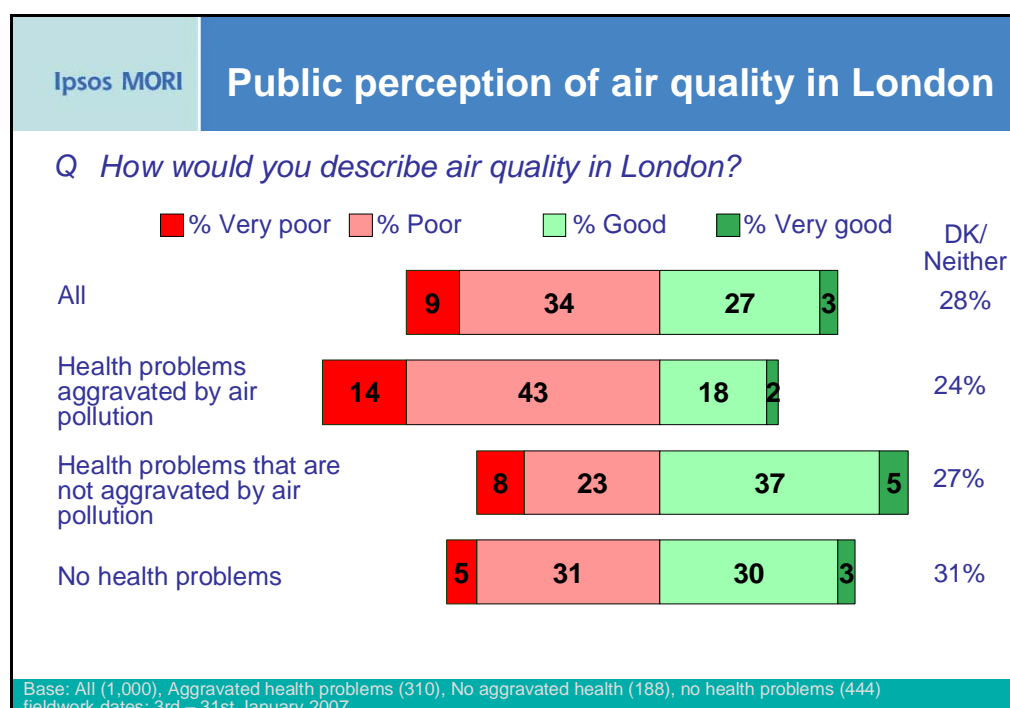
Air quality in London

Two-fifths of Londoners think the air quality in London is poor and half think pollution affects them or their family.

Just over two in five residents (42%) in Greater London think that the air quality in London is poor or very poor. However, almost a third (30%) of Londoners consider the air quality to be good.

While residents in Outer South London are least likely to think the air quality is poor (34% think it is poor or very poor) and those in Inner North London are most likely to think it is poor (49%), there is little variation in the perception of air quality across the rest of London.

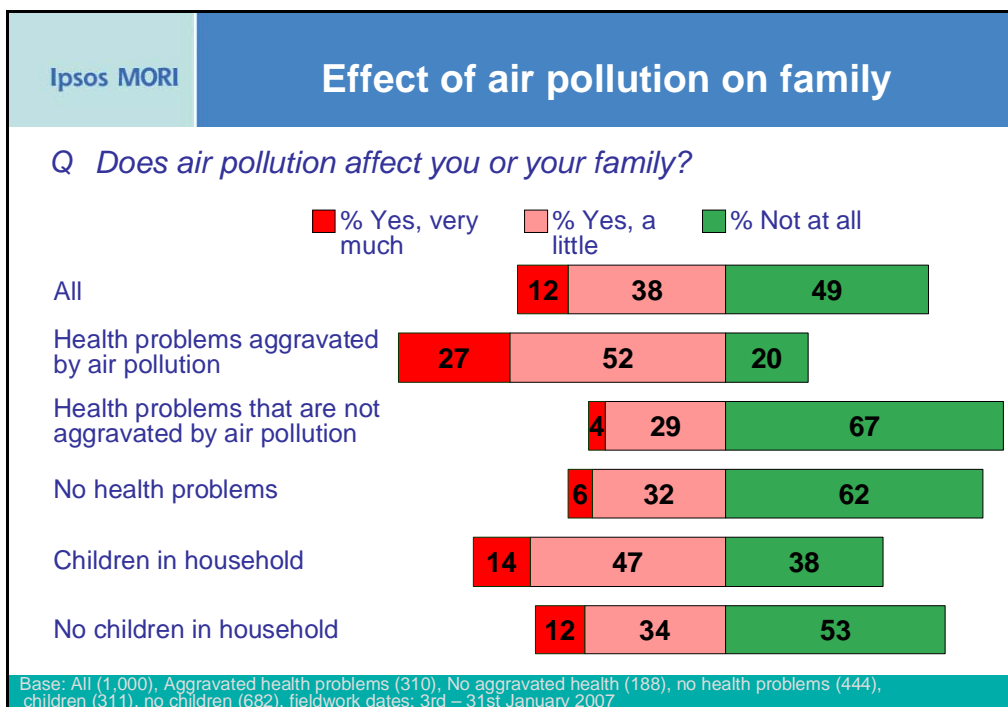
Residents were prompted on a series of health problems such as asthma and heart disease and asked if they suffered from any of these; if they did they were then asked if they thought they were aggravated by air pollution. As the chart below shows, those with any health problems aggravated by air pollution are most likely to describe the air quality in London as poor (56%) and residents with health problems that are not aggravated by air pollution are least likely to do so (31%).



As set out in Appendix 1, over half of residents (55%) also said that their health problems are aggravated by air pollution.

As the chart below shows, half of Londoners think that they or their family are affected by air pollution. This rises to eight out of ten (79%) of those with health problems aggravated by air pollution.

Also Londoners are more likely to think that air pollution affects them or their family if they have children in their household (61%).



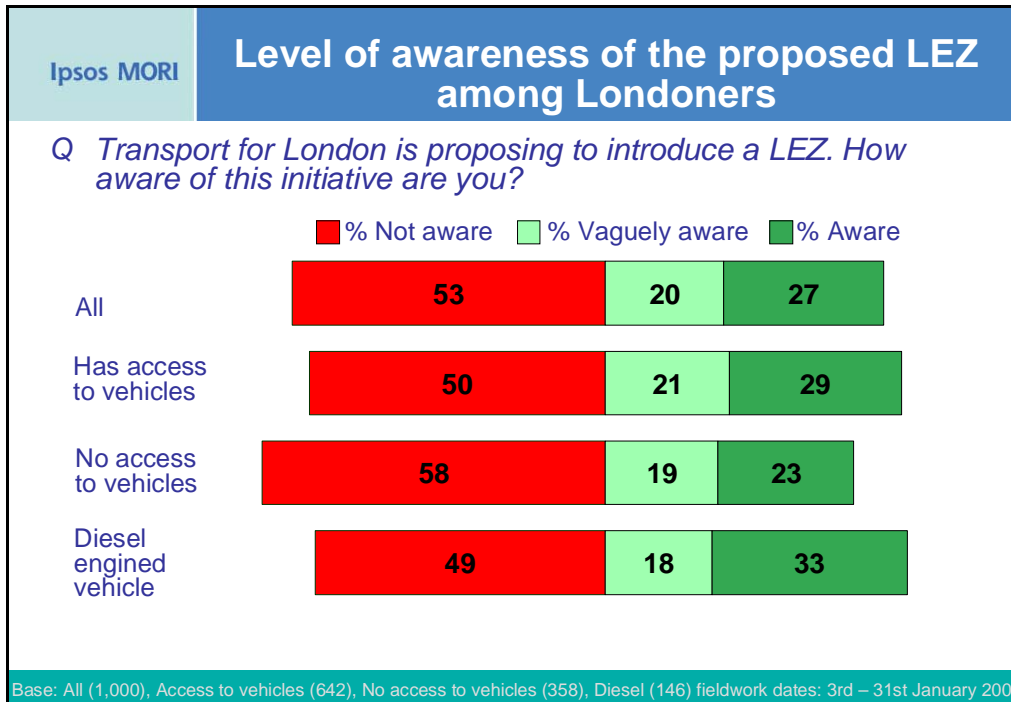
Black, Asian and Minority Ethnic (BAME) residents are more likely to think the air quality in London is good (42%) than white residents (25%). However, BAME residents are slightly more likely to think that air pollution affects them or their family (54%) than white residents (49%).

Older residents (60 plus) are least likely to think that air pollution affects them or their family (36%). This age group is also most likely to think that the air quality in London is good (40%).

Awareness of the proposed LEZ

Half of all Londoners are at least vaguely aware of the proposed LEZ.

Almost half of Londoners (47%) were aware or vaguely aware of the proposed LEZ before completing the survey, increasing slightly to half of residents who have at least one car in their household.

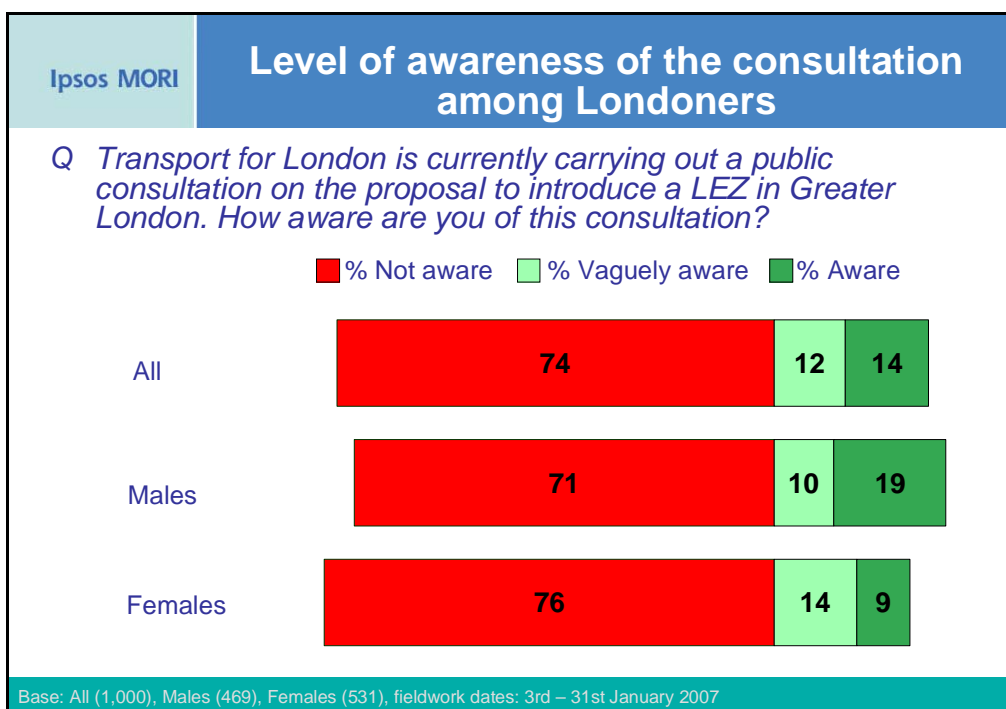


Over half (53%) of the 60 plus age group is aware of the LEZ compared to 36% of Londoners aged 16-24.

Awareness of the LEZ Scheme Order consultation

Awareness of the LEZ Scheme Order consultation is lower than the proposed LEZ itself: a quarter of Londoners are aware or vaguely aware of it.

One quarter (26%) of London residents are at least vaguely aware of TfL's consultation about the proposed LEZ. Also, as the chart below shows, men (19%) are more likely than women (9%) to be fully aware of it.



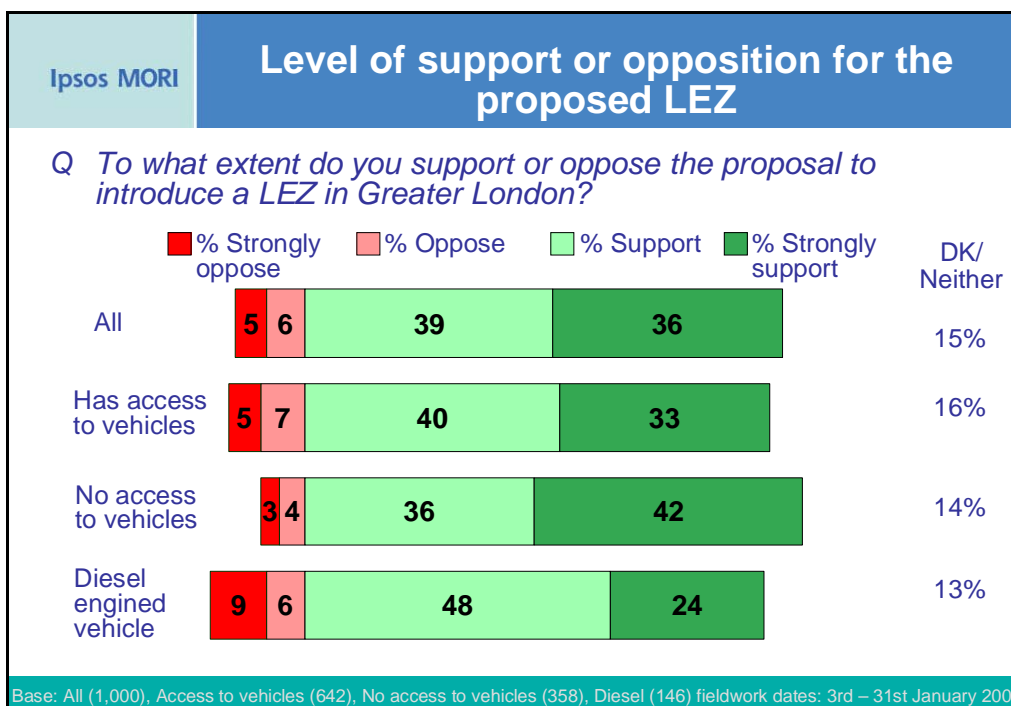
Those aged over 45 (32%) are more aware of the consultation than those aged under 25 (18%).

Support for the proposed LEZ

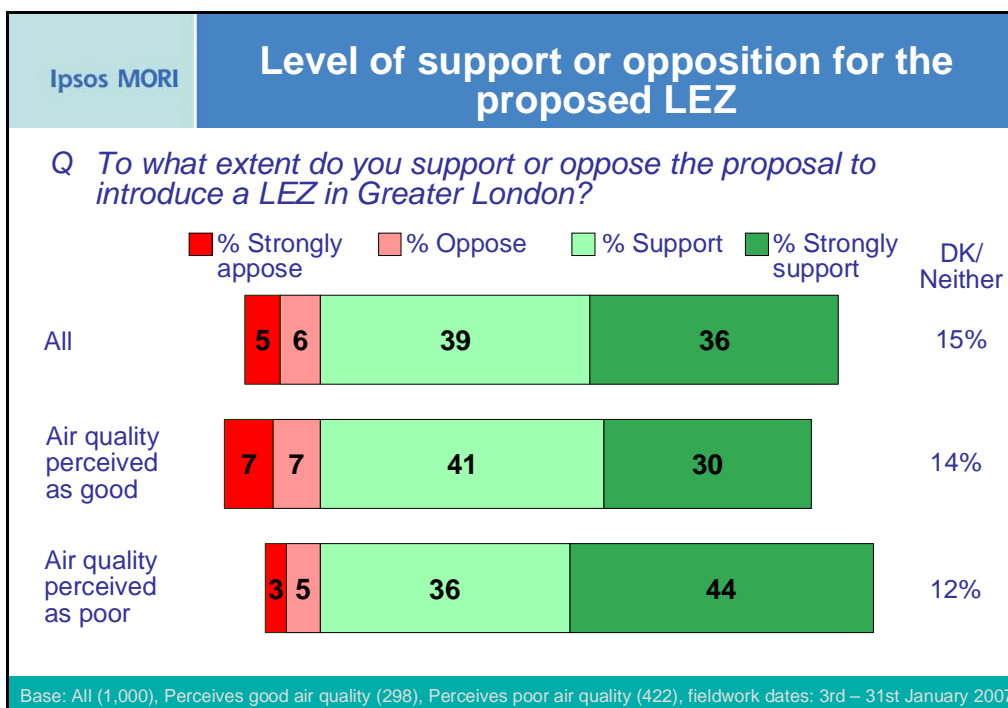
Three-quarters of Londoners support the proposed LEZ and think the proposal that pre-2001 vehicles would have to be modified to meet the LEZ emission standard is reasonable.

Support for the LEZ is high, with three-quarters of Londoners supporting it, and only one in ten (10%) opposing the LEZ.

As the chart below shows, residents without access to a vehicle are slightly more supportive of the LEZ (78% strongly support or support it) than people with access to a vehicle (73%).



Support for the LEZ is slightly higher among Londoners who perceive the air quality to be poor (79% support it); than those who perceive air quality to be good (72% support it).

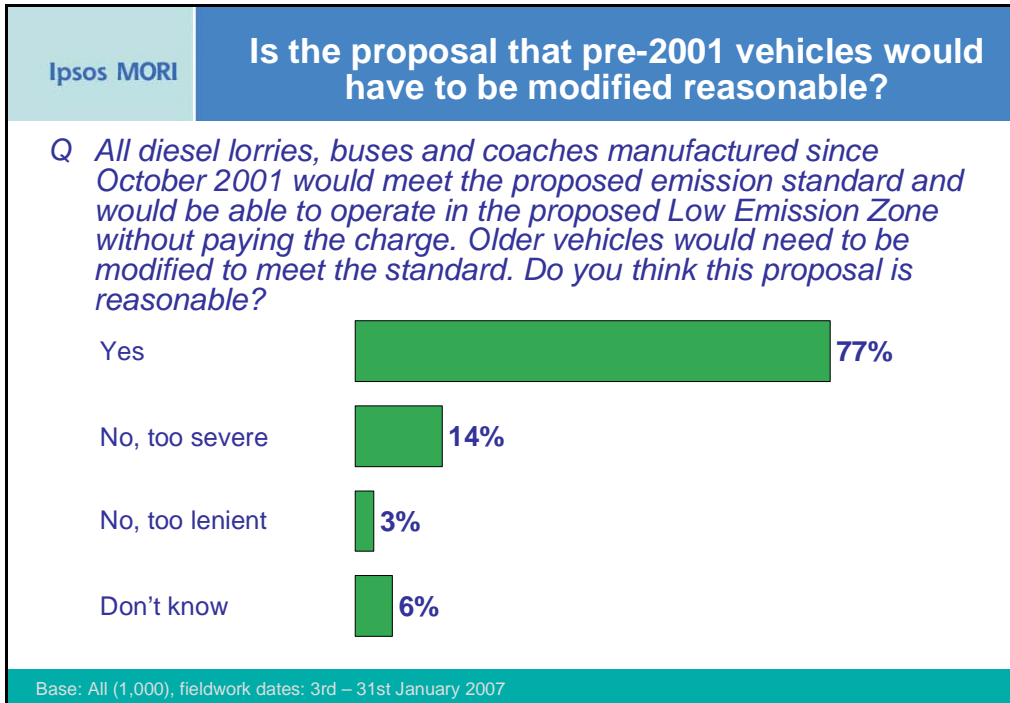


Prior awareness of the LEZ does appear to influence support: residents who were aware or vaguely aware of the LEZ before the survey are more supportive (80%) than those who had not heard of it (70%).

Support is also higher amongst those with health problems aggravated by pollution (48% strongly support this).

Also young people under 25 are less supportive of the LEZ (67% support this) with those aged 60 plus most likely to support it (80%).

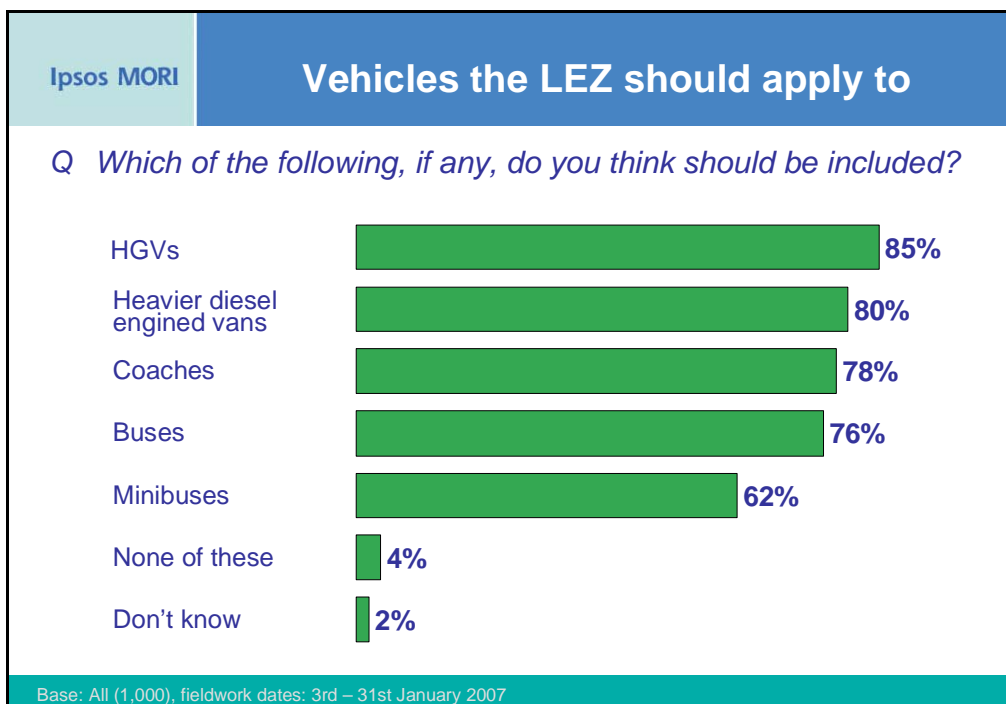
The majority of Londoners (77%) feel that the proposal for pre-2001 vehicles to require modification or pay the charge is reasonable. Eighty five percent of those who support the LEZ think it is reasonable, compared to 48% of those who oppose the LEZ.



Vehicles to which the LEZ should apply

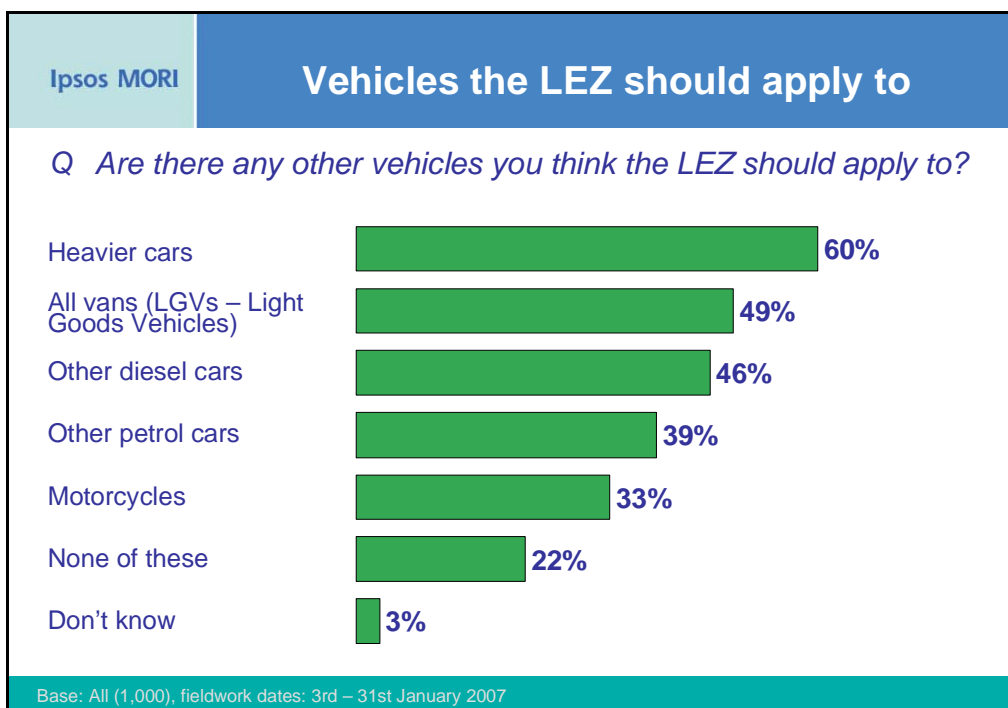
Londoners were informed that from 2008 it is proposed that the LEZ would apply to HGVs buses and coaches and from 2010 it would apply to heavier diesel engine vans and minibuses. Approaching nine in ten (85%) residents think it should include HGVs and 80% think that it should apply to heavier diesel vans.

Only 4% of Londoners think that none of the vehicles mentioned should be included in the scheme.



Consistently more residents who perceive the air quality in London to be poor think that all vehicle categories mentioned should be included than residents who perceive the air quality to be good.

In considering other vehicles that the LEZ should apply to, 60% of residents think that heavier cars should be included and 49% think that all vans should be included.



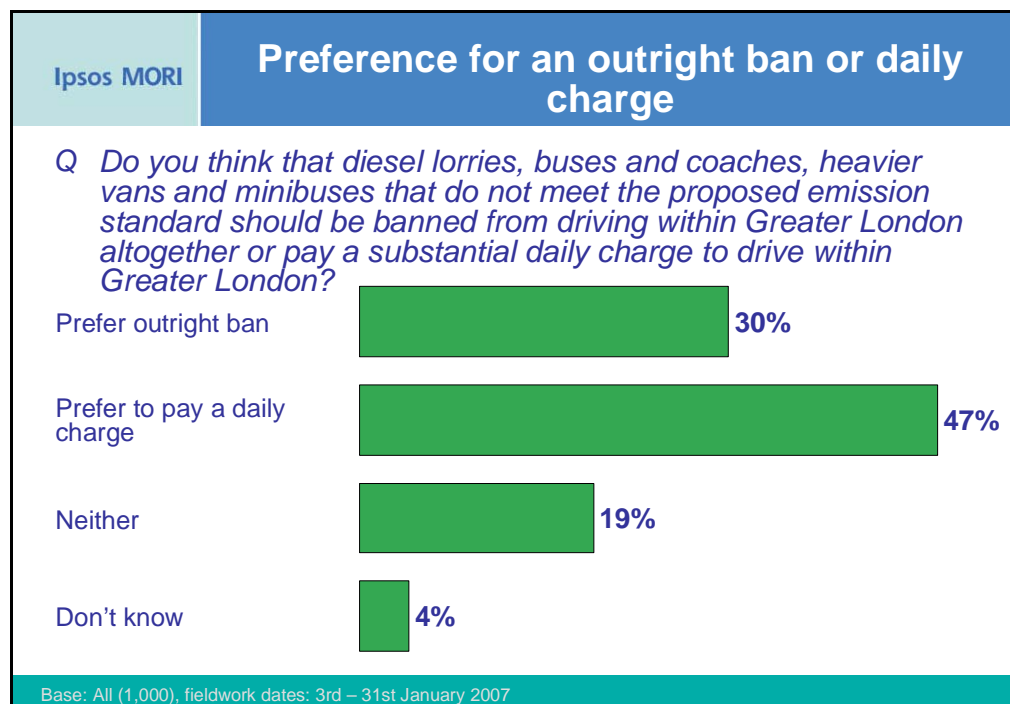
Residents without access to a vehicle are more likely to think that the additional vehicles mentioned should be included in the LEZ than those with access to a vehicle. For example, 65% of those with no vehicles in the household think that heavier cars should be included compared to 58% with at least one car in the household.

Also Londoners who have health problems aggravated by air pollution, who perceive London’s air quality to be poor and who support the LEZ, are consistently more likely to think the LEZ should apply to all additional vehicles mentioned.

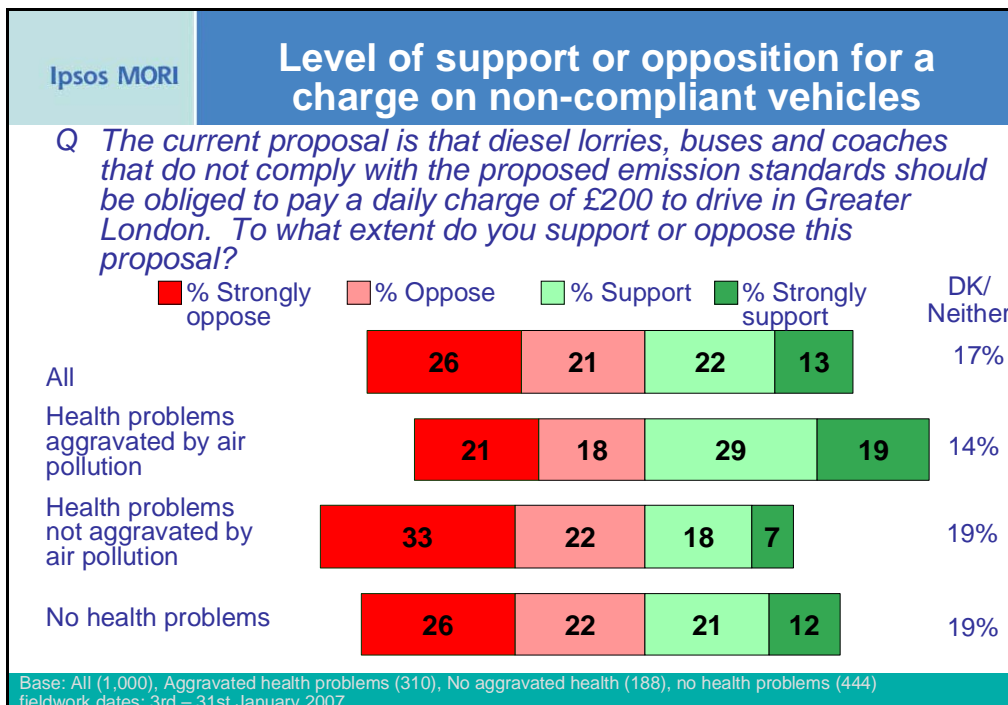
Support for the proposed charge

Opposition is greater than support for a charge of £200 for HGVs, buses and coaches but more balanced on support for a £100 charge for heavier LGVs and minibuses. Half of Londoners prefer a charge, and a third an outright ban.

Overall 47% of Londoners prefer a daily charge whereas 30% prefer an outright ban, with this being highest among residents aged 45 plus (36%). One in five (19%) think there should be neither a ban nor a charge.



Nearly half (47%) of residents oppose the proposal that lorries, buses and coaches not complying with the proposed emission standards should pay a daily charge of £200, whereas 35% support it. Opposition increases to 57% among Londoners with access to a diesel engined vehicle.

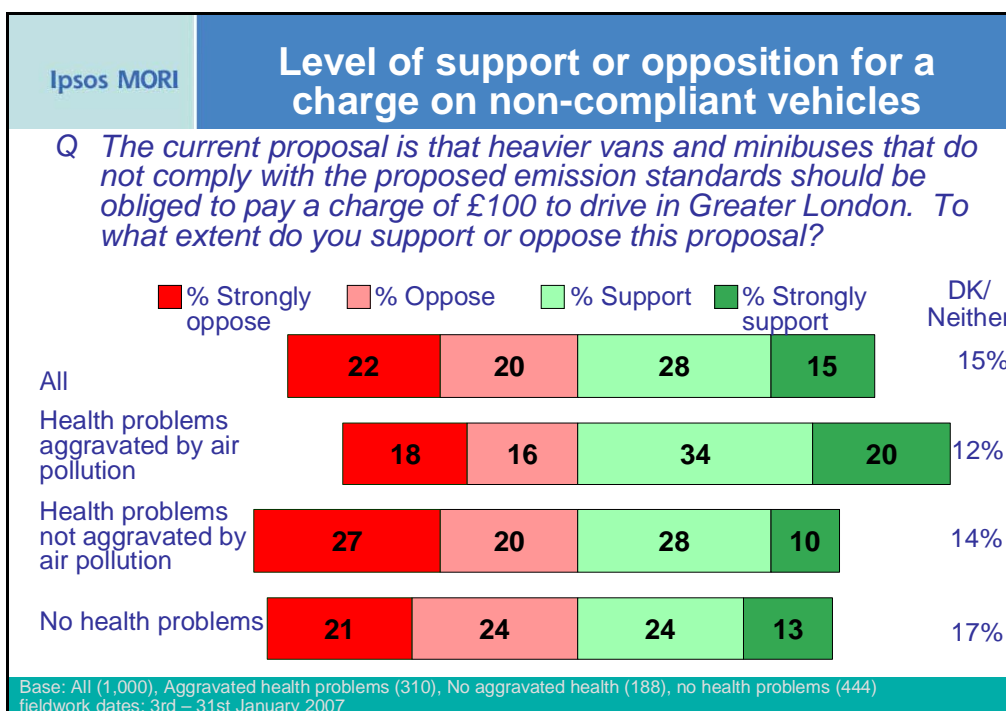


As the chart above shows, support for a daily charge on non-compliant vehicles is strongest for residents who have health problems aggravated by air pollution (48%).

Also just under half (47%) of residents who have lived in London under 10 years are supportive of the £200 charge, compared to 31% who have lived in London for more than 10 years.

There is a dichotomy of views for the proposal that heavier vans and minibuses that do not comply with the proposed emission standard should pay £100 with 43% of residents supporting the proposal and a similar proportion opposed (42%).

Again, support is higher among residents who suffer from health problems aggravated by air pollution (54%) than those who have health problems that are not aggravated by air pollution (38%).

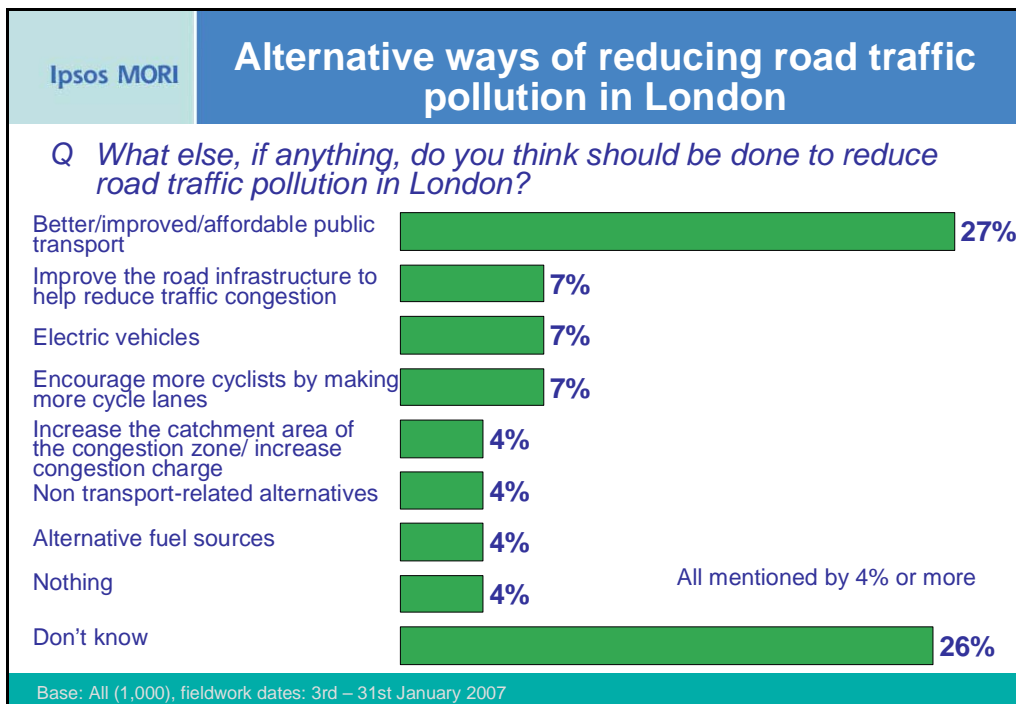


Other ways to reduce road traffic pollution

Improvements in public transport could help reduce road traffic pollution.

When asked what else could reduce road traffic pollution, over a quarter (27%) of Londoners mentioned better/ improved/ more affordable public transport.

Improving the road infrastructure to help reduce traffic congestion, encouraging cycling by introducing more cycle lanes, and encouraging electric vehicles were also suggested by 7% of Londoners.



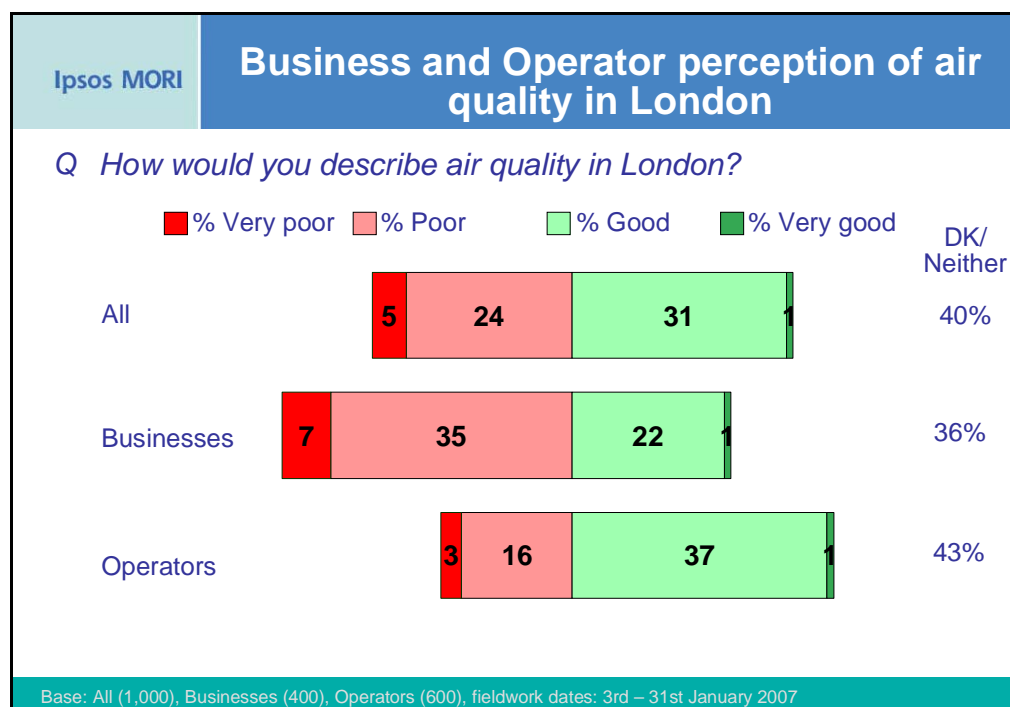
Main findings: Businesses and Operators

Air quality in London

Businesses are more likely than operators to believe that air quality in London is poor.

Two in five (42%) businesses think that air quality is poor, however only 19% of operators share that opinion. Conversely whilst 23% of businesses think that air quality in London is good, this rises to 38% amongst operators. This varies by location. Operators inside Greater London are more likely to think air quality is poor (30%) compared to 15% of those outside Greater London. Also businesses in outer London are more likely to think air quality is good (28%) compared to 19% of those in inner London.

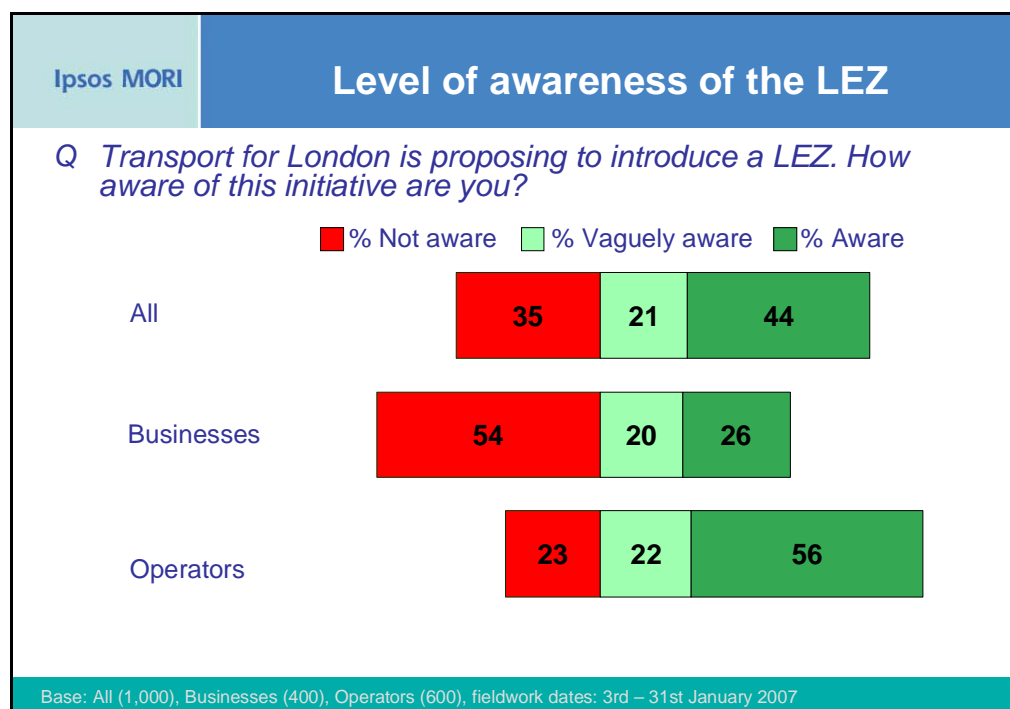
Operators with minibuses (55%) and coaches (58%) are more likely to believe that air quality in London is good than operators with small (36%), medium (36%) and large (37%) HGVs.



Awareness of the proposed LEZ

Operators are more likely than businesses to be aware of the proposed LEZ.

Over three-quarters (77%) of operators are aware or vaguely aware of the proposed LEZ, including 56% who are aware. This is significantly higher than businesses, where just under half (46%) are aware or vaguely aware of the proposed LEZ.



Operators outside of Greater London are more likely to be at least vaguely aware (80%) of the proposed LEZ than operators in Greater London (69%). Overall, the operators most likely to be at least vaguely aware of the proposed LEZ are those in the South of England (84%) and the operators least aware are those in inner London (63%).

Operators, who are going to be affected first by the LEZ, namely operators with large HGVs and coaches, are more likely to be fully aware of the proposed LEZ than operators with small and medium HGVs, minibuses and heavier vans. Over eight in ten operators with coaches (86%) and six in ten large HGVs² (65%) are fully aware of the proposed LEZ, compared to 49% of operators with heavier vans.

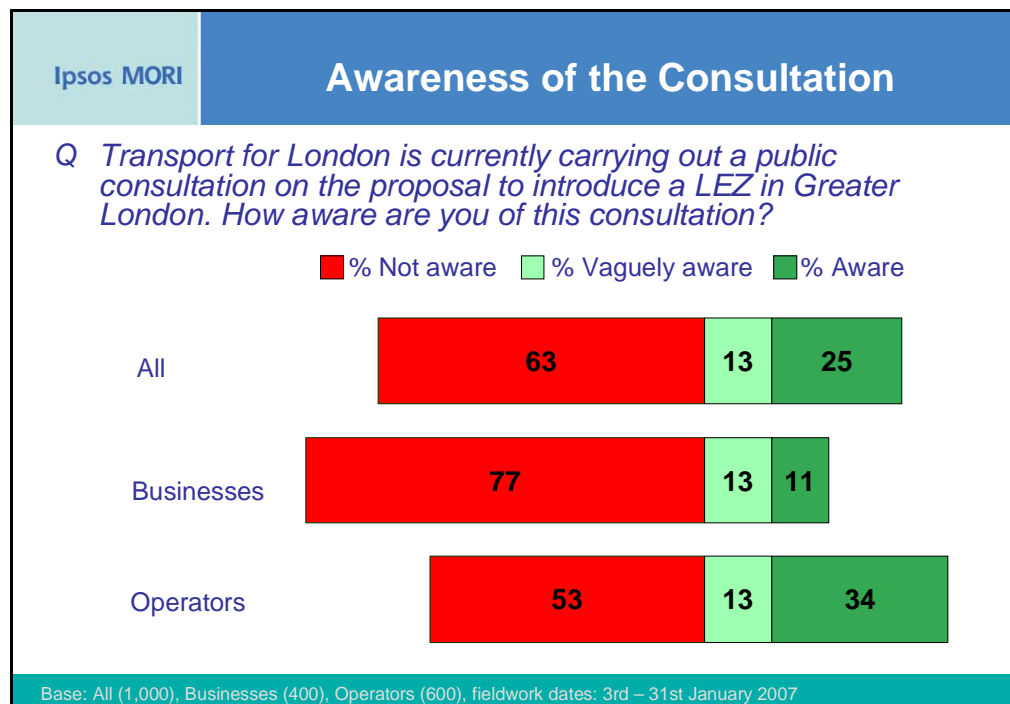
Also operators with more than ten vehicles in their fleet (83%) are more likely to be at least vaguely aware of the LEZ than operators with fewer than 11 vehicles (71%).

² HGVs over 12 tonnes

Awareness of the LEZ Scheme Order consultation

Operators are more likely than businesses to be aware of the LEZ Scheme Order consultation.

Mirroring awareness of the proposed LEZ, operators are more likely to be aware of the consultation than businesses. Nearly half (47%) of operators were aware or vaguely aware of the consultation, including 34% who are aware, whereas 23% of businesses are at least vaguely aware of the consultation.



While operators outside Greater London are more likely to be aware of the proposed LEZ, this is not the case for awareness of the consultation and awareness is broadly the same for both groups (48% outside Greater London are at least vaguely aware compared with 44% in inside Greater London). However, mirroring awareness to the proposed LEZ, operators outside London in the South of England are most likely to be at least vaguely aware of the consultation (57%). Operators in the south east of England are most aware of the LEZ and those in inner London the least aware. This may reflect the fact that there are a greater proportion of very small operators who operate within inner London, and who tend not to be as attentive to public information campaigns as larger operators. Larger fleets tend to be based outside this area.

As for awareness of the proposed LEZ, operators with more than ten vehicles in their fleet are more likely to be at least vaguely aware of the consultation (53%) than operators with fewer than 11 vehicles (40%).

Coach (61%) and minibus (55%) operators are more likely to be fully aware of the consultation than operators with small³ (34%), medium⁴ (36%) or large (39%)

³ HGVs 3.5 to 7.5 tonnes

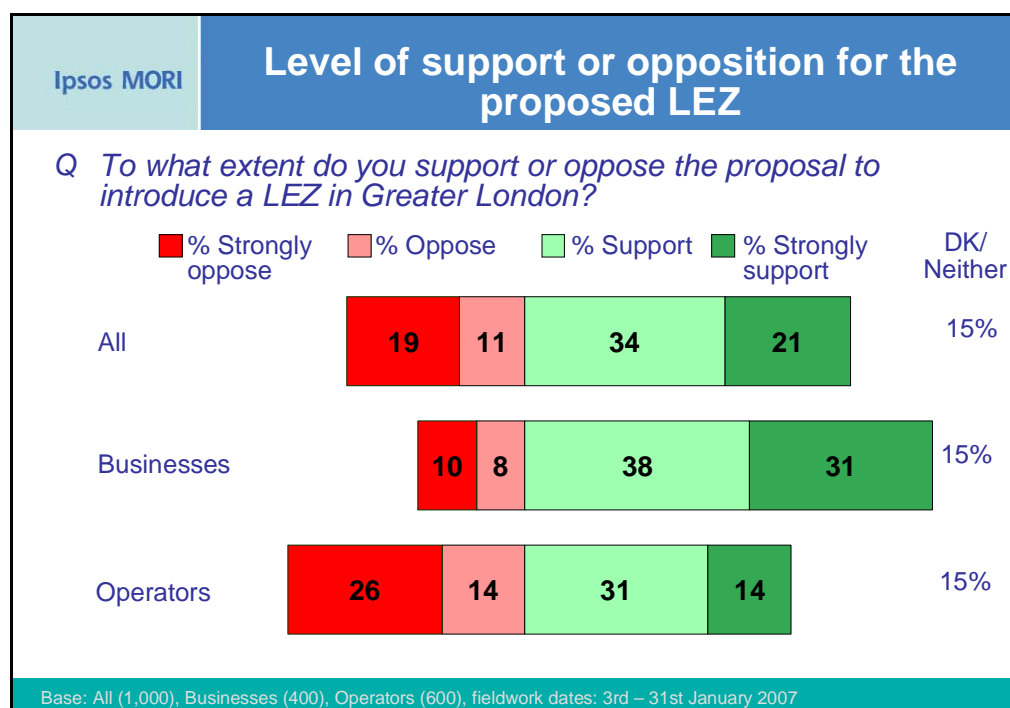
⁴ HGVs 7.5 to 12 tonnes

HGVs. It should be noted that 47% of operators with minibuses also have coaches.

Support for the proposed LEZ

Support for the proposed LEZ is lower among operators than businesses, and operators are more likely to believe that the proposal is too severe.

As the chart below shows, seven in ten (69%) businesses support the LEZ, including 31% who strongly support it. However, just under half (45%) of operators support it and a similar proportion (40%) oppose the scheme, including a quarter (26%) who strongly oppose it.



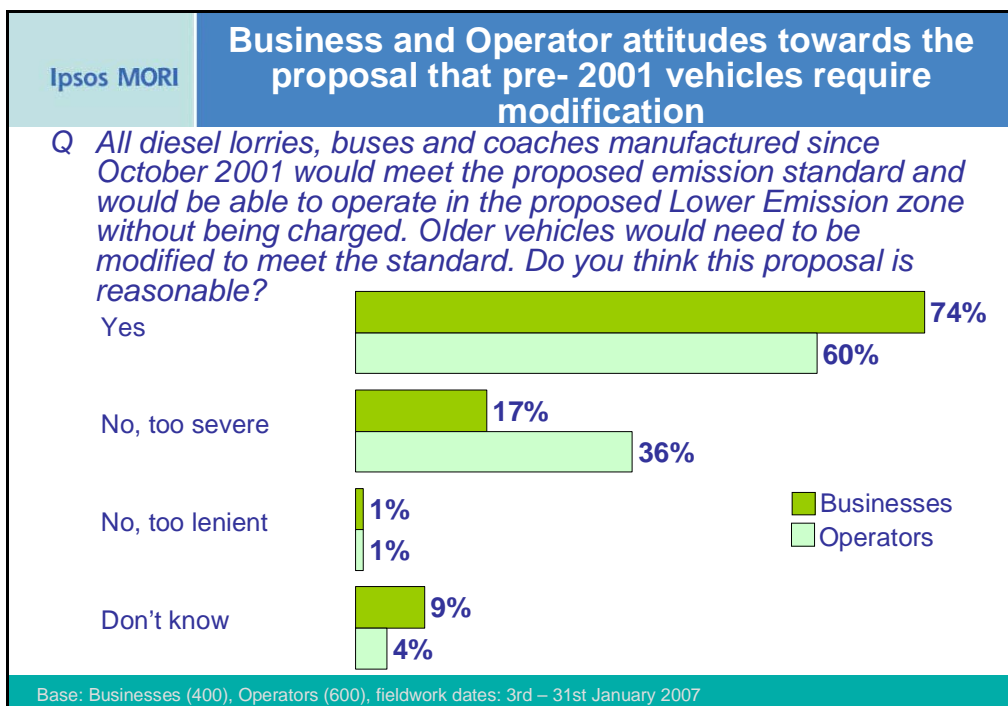
The more central a business is within Greater London, the less likely they are to support the scheme. Around half (54%) of businesses in central London support the scheme, compared to two-thirds (64%) in inner London and three-quarters (74%) in outer London.

Even though all operators surveyed operate vehicles in Greater London at least once every two weeks, operators outside of Greater London are more likely to support the scheme. Nearly two in five (39%) operators in Greater London support the proposal, compared to 47% outside of Greater London and this rises to 52% for operators in the North of England and Scotland.

There are no differences between the types of vehicles that operators have and how many vehicles that they have in their fleet and their level of support of the proposed LEZ.

Businesses and operators who were unaware of the proposed LEZ before the survey are more likely to support the proposal (62%) than those who were at least vaguely aware of it before the survey (50%).

Three-quarters (74%) of businesses think that the proposal that all diesel lorries buses and coaches manufactured before October 2001 would need to be modified to meet the standard is reasonable compared to only six in ten operators. Operators (36%) are more likely than businesses (17%) to believe that the proposal is too severe and neither group believe that the proposal is too lenient.



Operators with heavier vans (65%) are more likely to think that the proposal is reasonable than operators with medium HGVs (56%), large HGVs (55%) and coaches (33%).

Two in five (42%) large HGV operators with fewer than 20 vehicles in their fleet think that the proposal is too severe compared to one quarter (26%) with 20 or more large HGV vehicles.

Operators who have vehicles manufactured before 2001 and would therefore be most directly affected by the proposal are more likely to think that it is too severe than those with no vehicles manufactured before 2001 (40% versus 28%).

Vehicles to which the LEZ should apply

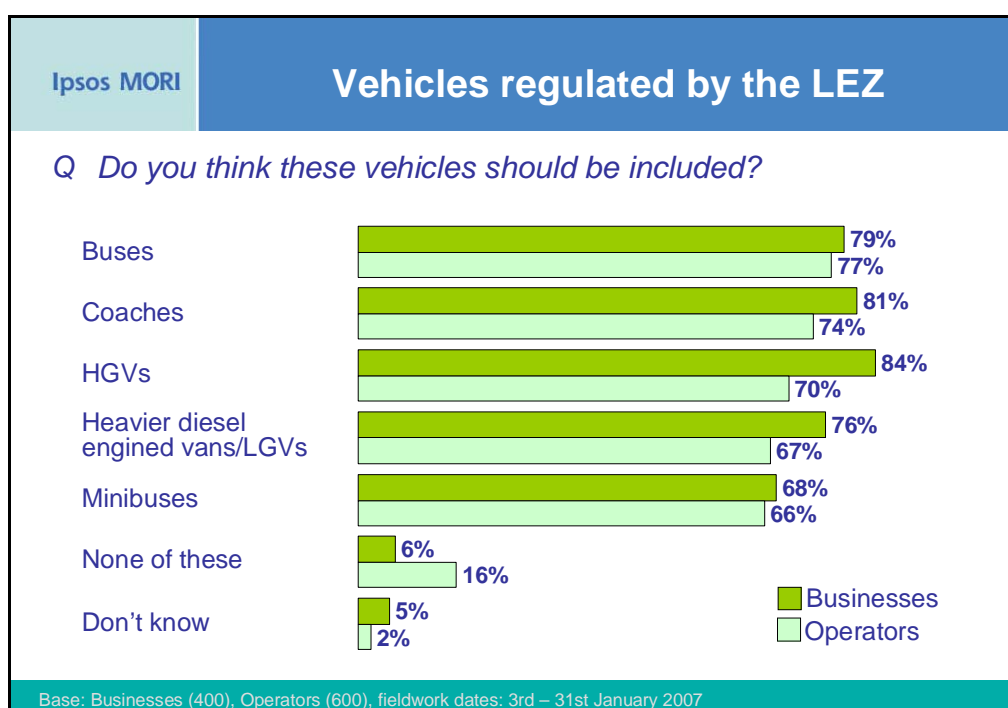
Businesses are most likely to think the LEZ should apply to HGVs, whereas operators are most likely to think it should apply to buses and coaches. However, around two-thirds of operators and businesses think the LEZ should apply to all the vehicles proposed to be regulated by the LEZ. While there is less support among operators for the LEZ to apply to all types of proposed vehicles than businesses, though only 16% of operators think the LEZ should not apply to any of the vehicles proposed.

Businesses and operators were told that diesel engined HGVs, buses and coaches would be included in the LEZ from 2008 and heavier diesel vans and minibuses would be included from 2010.

As the chart below shows, eight in ten businesses believe that the LEZ should apply to HGVs (84%) and coaches (81%), compared to seven in ten operators (70% of operators think that LEZ should apply to HGVs and 74% to coaches). Businesses and operators are equally as likely to think that the LEZ should apply to buses (79% for businesses and 77% for operators).

There is slightly less support for the LEZ to apply to the vehicle categories planned to be introduced in 2010. Three-quarters of businesses (76%) believe that the LEZ should apply to heavier diesel engined vans compared to 67% of operators. Businesses and operators are equally as likely to think that the LEZ should apply to minibuses (68% for businesses and 66% for operators).

Operators (16%) are more likely than businesses (6%) to think that it shouldn't apply to any vehicles.



Operators outside of Greater London are more receptive to the LEZ applying to all types of vehicles compared to operators inside of Greater London.

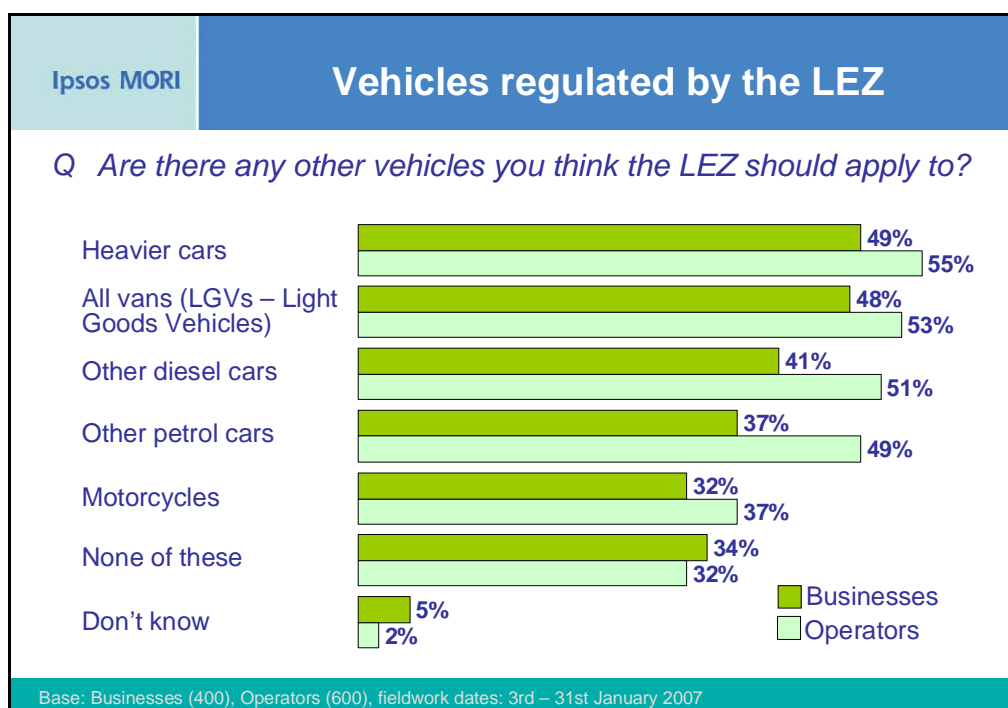
- Seven in ten (73%) operators outside Greater London think it should apply to HGVs compared to 63% inside Greater London
- Eight in ten (79%) outside Greater London think it should apply to buses compared to 70% inside Greater London
- Nearly eight in ten (77%) outside Greater London think it should apply to coaches compared to 66% inside Greater London

This rises further for operators in the North of England and Scotland where 84% think it should apply to buses and 85% think it should apply to coaches.

Operators are slightly less likely to believe that the LEZ should apply to the vehicle that they operate than other vehicles. For example, 69% of operators with large HGVs think that the LEZ should apply to HGVs, compared to 75% who think it should apply to coaches and 77% to buses. Similarly, 67% of operators with coaches think that the LEZ should apply to coaches, compared to 69% who think it should apply to buses and 81% to HGVs.

Operators with 100 or more vehicles are more likely to believe that the LEZ should apply to all types of vehicles than single vehicle operators. For example, 82% of operators with 100 or more vehicles think that it should apply to HGVs compared to 63% of operators with only one vehicle.

Businesses and operators were asked about any other types of vehicles that the LEZ should apply to; these are vehicles that are currently not planned to be included within the LEZ. Overall, there is less support for the LEZ to apply to these other types of vehicles. However, as the chart below shows, for all types of vehicles operators are more likely to think that the LEZ should apply to these than businesses. Both businesses (49%) and operators (55%) are most likely to believe that the LEZ should also apply to heavier cars. Around a third (34% for businesses and 32% for operators) do not think it should apply to any of these vehicles.



For each type of vehicle that businesses were prompted on with regards to whether the LEZ should apply to it or not, businesses located in the southern boroughs of Greater London are more likely to believe that the LEZ should apply to each vehicle type than businesses in northern Greater London. For example, 48% of businesses in the South of Greater London think it should apply to other diesel cars compared to 36% in the north of Greater London.

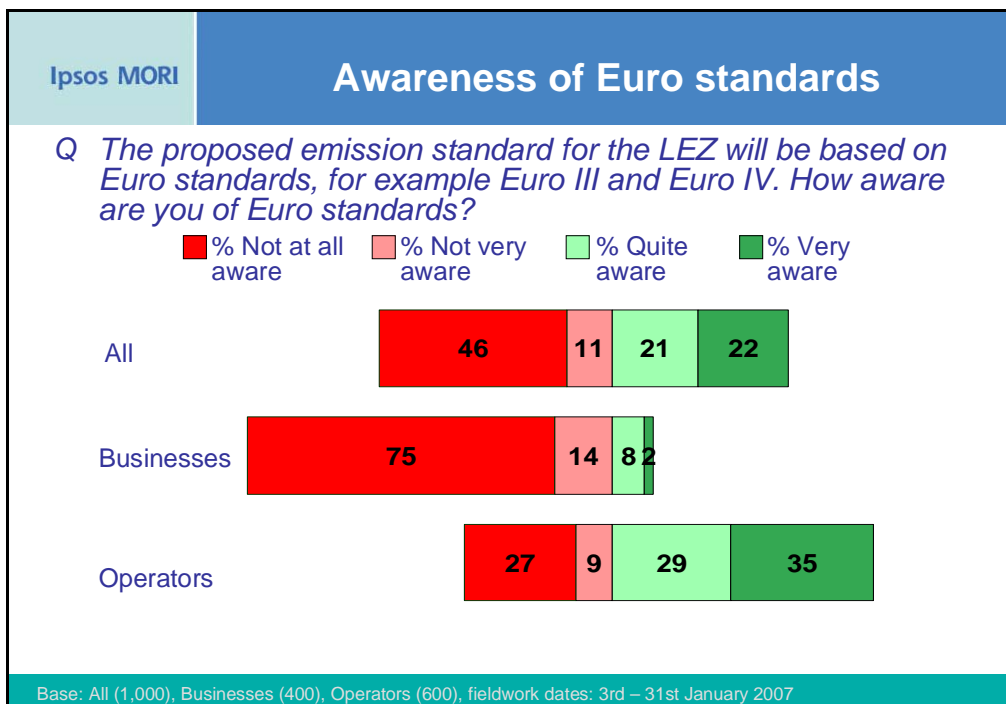
Mirroring the main types of vehicles that operators think the LEZ should apply to, operators outside of Greater London are also more receptive to the LEZ applying to all of these types of vehicles compared to operators inside of Greater London. For example, 60% of operators outside of Greater London think it should apply to heavier cars compared to 42% inside Greater London. This rises further for operators in the North of England and Scotland where 66% think it should apply to heavier cars.

Operators with more than one vehicle in their fleet think it should apply to all types of vehicles. For example, 55% of operators with more than one vehicle in their fleet think it should apply to all types of vans compared to 36% with only one vehicle.

Awareness of Euro Standards

There is greater awareness of Euro standards among operators than businesses.

Two-thirds of operators (64%) are aware of Euro standards, including 35% who are very aware. As may be expected, awareness is considerably lower among businesses, of which only 11% are aware.



Three-quarters (76%) of operators with more than ten vehicles in their fleet are aware of Euro standards compared to half (52%) with two to ten vehicles and two in five (43%) one man bands.

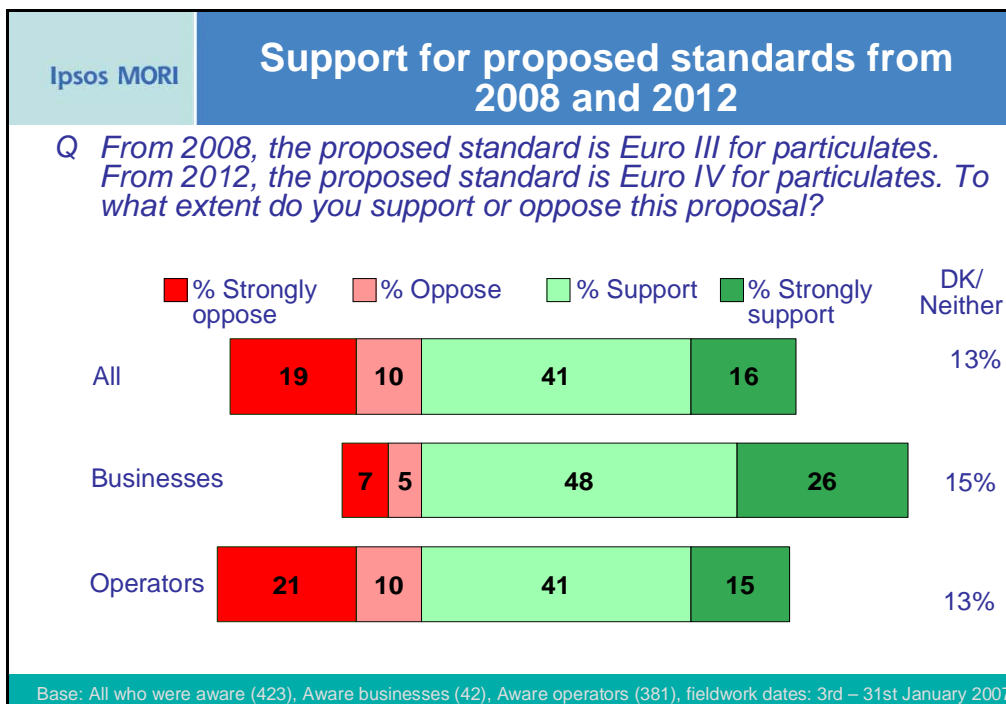
Eight in ten operators with large HGVs (82%) and coaches (81%) are aware of Euro standards compared to seven in ten operators with small and medium HGVs (both 69%), 62% with minibuses and 52% of heavier van operators.

Awareness is considerably higher for operators outside of Greater London. Seven in ten (71%) operators outside of Greater London are aware of Euro standards compared to 45% in Greater London.

Support for proposed Euro III and Euro IV Emission Standards

Support for proposed Euro III and Euro IV Emission Standards is higher among businesses than operators.

For those that are aware of Euro standards, support for the proposal that the standard is Euro III for particulates in 2008 and Euro IV for particulates in 2012 is higher for businesses (74%) than operators (56%).



Support is higher for operators outside of Greater London. Nearly six in ten (58%) operators outside of Greater London support the proposed standards compared to 49% in Greater London.

One third of operators with large HGVs (34%) oppose the proposed standards compared to a quarter of small HGV (27%) and heavier van (24%) operators.

Support for the proposed standards is higher for operators who do not have any vehicles manufactured before 2001; seven in ten operators who do not have any vehicles manufactured before 2001 support the standards compared to 49% who do.

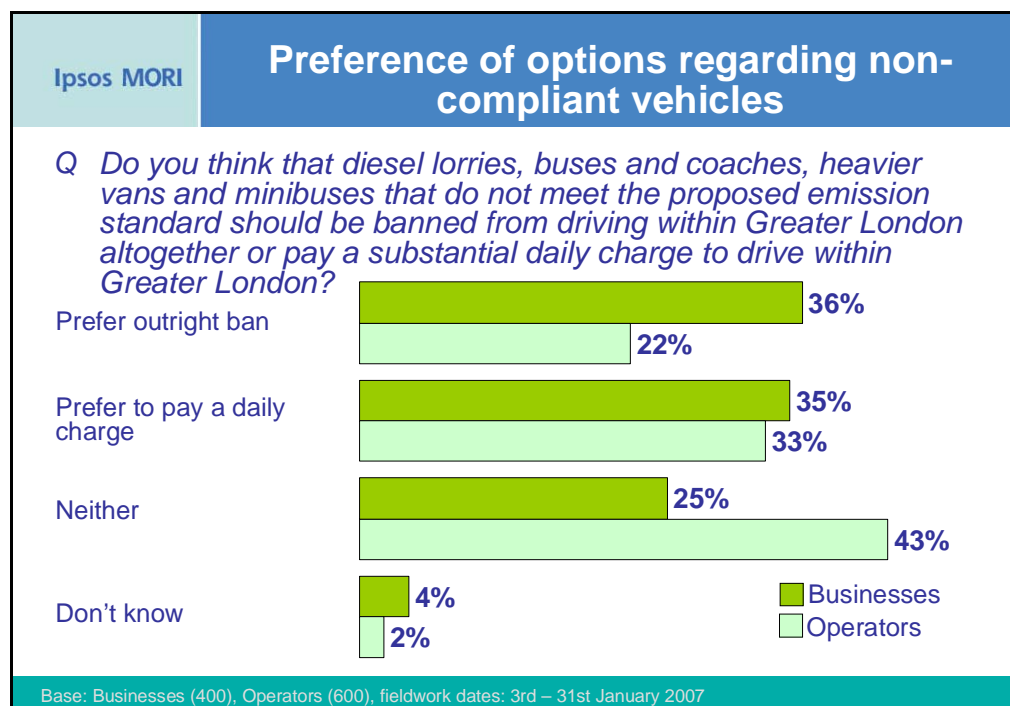
Additionally, support for the standards is higher for businesses and operators who support the LEZ. Over eight in ten (84%) operators who support the LEZ also support the proposed emission standards compared to 28% who oppose the LEZ.

Support for the proposed charge

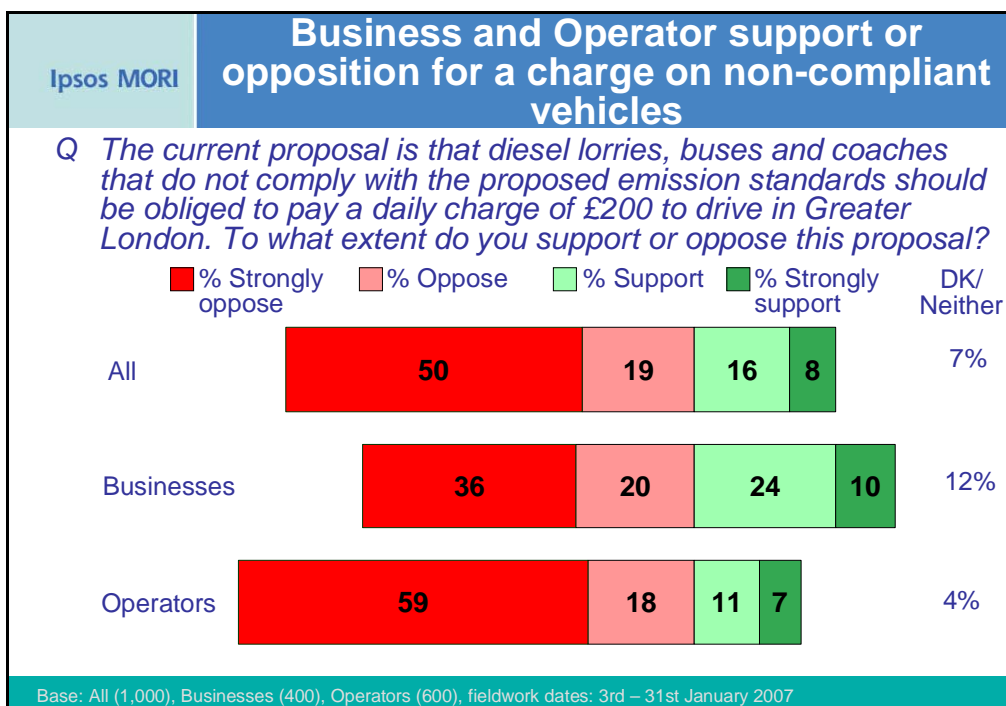
Operators are not in favour of either an outright ban or a daily charge, but out of the two are more likely to prefer the charge. Support for the £100 charge for heavier vans and minibuses and £200 charge for HGVs, buses and coaches is higher among businesses than operators with slightly greater support overall for the £100 charge.

For vehicles that do not meet the required emission standards, businesses are equally as likely to prefer a ban (36%) as a daily charge (35%) and only a quarter don't want either option. For operators that do give a preference, they are more likely to prefer the charge (33%) than the outright ban (22%).

However, operators are most likely to prefer neither option (43%) and this rises to 50% for those who have vehicles manufactured before 2001, 54% for operators in the North of London and 67% for those businesses and operators that oppose the LEZ



Businesses and operators were informed that diesel lorries, buses and coaches that do not comply with the proposed emission standard would have to pay a daily charge of £200 to drive within Greater London. Mirroring support for the proposed LEZ overall, support for this charge is higher among businesses (33%) than operators (19%). However, it should be noted that support for this charge is lower than overall support for the proposed LEZ (69% versus 33% for businesses and 45% versus 19% for operators).

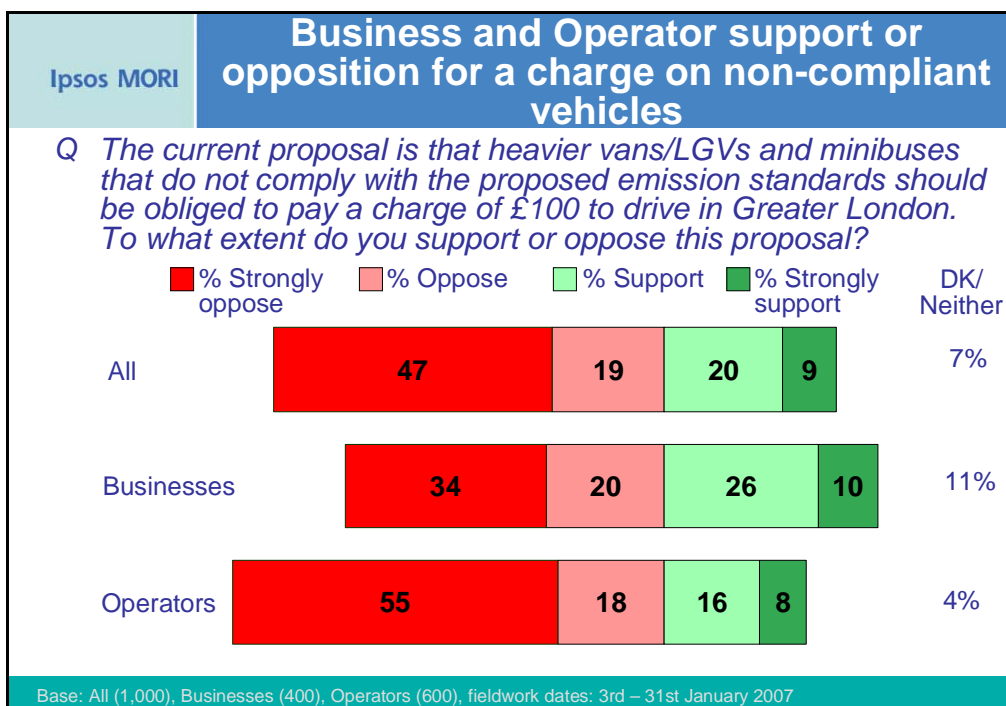


Businesses in the North of London (37%) and operators in Greater London (24%) are more likely to support the daily £200 charge than businesses in the South of London (27%) and operators outside of Greater London (16%).

One in three (27%) operators who do not have any vehicles manufactured before 2001 support the £200 daily charge compared to 14% who do.

There are no differences between the type of vehicles that operators have and their level of support or opposition for the charge.

Businesses and operators were then informed that heavier vans and minibuses that do not comply with the proposed emission standard would have to pay a daily charge of £100 to drive within Greater London. Reflecting support for the proposed LEZ overall and support for the £200 charge, support for this charge is also higher among businesses (36%) than operators (23%). Support for this charge is marginally higher than support for the £200 charge (33% versus 36% for businesses and 19% versus 23% for operators).



Businesses in the North of London (40%) are more likely to support the daily £100 charge than businesses in the South of London (28%).

There are no differences between levels of support and opposition and whether operators are based in or outside of Greater London. However, operators in the South of London (37%) are more likely to support the daily £100 charge than operators in the North of London (17%). Also outside of Greater London, operators in the North of England and Scotland (28%) and operators in the South of England (26%) are more likely to support the charge than operators in the Midlands, East Anglia and Wales (16%).

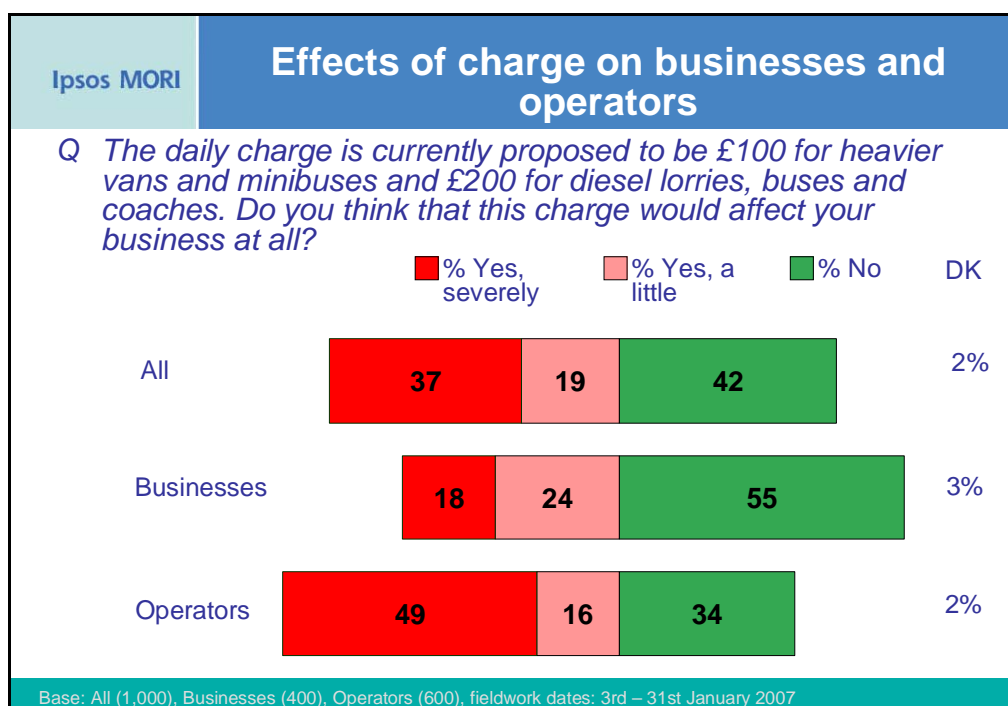
Operators without vehicles manufactured before 2001 are more likely to support the charge (31%) than operators with such vehicles (18%).

Effect of the charge on businesses

Operators are most likely to think that they would be affected by the daily charge and this is most likely to be because it would cost them more to make deliveries.

Two thirds (65%) of operators believe that they would be affected by the charge, including 49% who think that they would be severely affected. Businesses are less likely to think that they would be affected (42% think they would be affected).

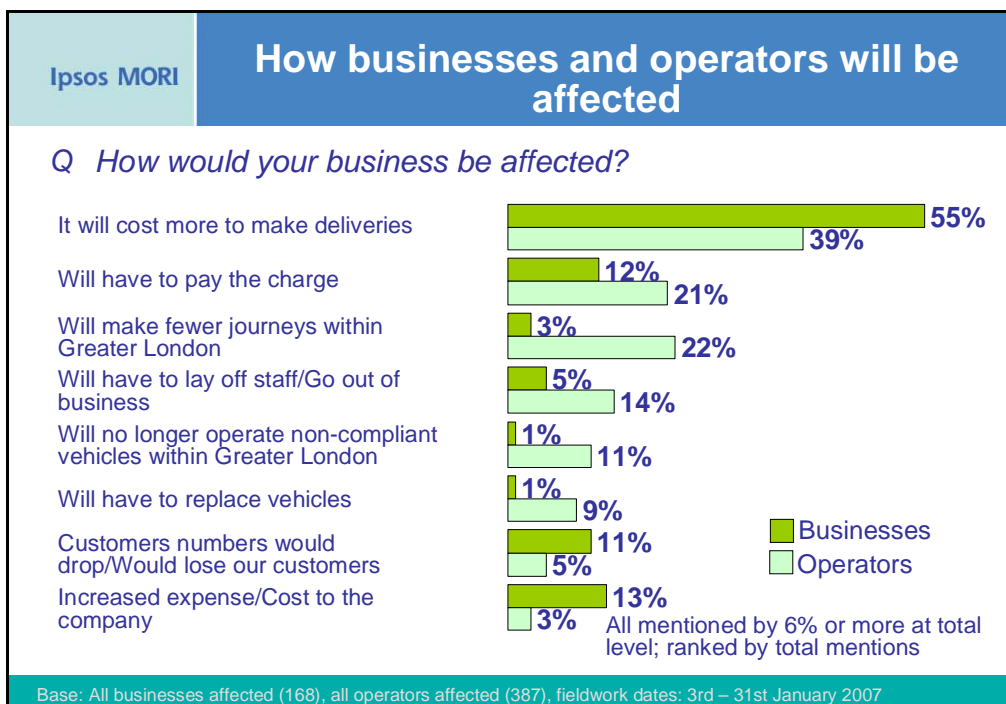
The effect on businesses is expected to be higher in inner rather than outer London. 23% of businesses in inner London think they would be severely affected compared to 13% of businesses in outer London. There is little difference among operators and where they are located and the effect they think that the LEZ would have on their business.



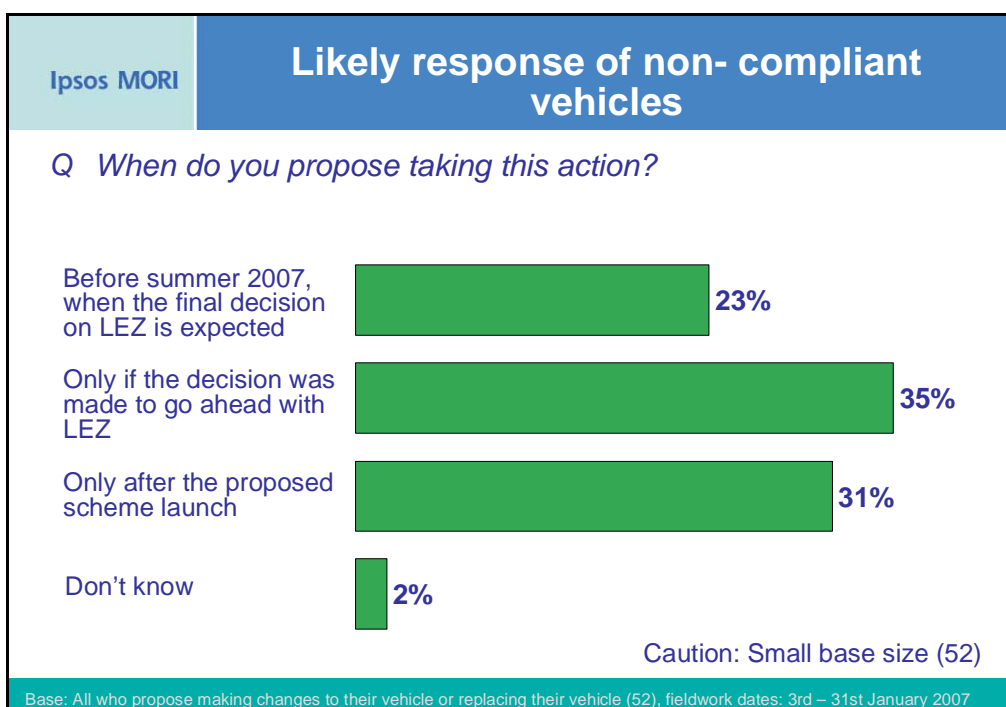
Businesses in the retail/wholesale sector are much more likely to think that they would be severely affected (37%) than businesses overall (18%).

Unsurprisingly, operators who have vehicles manufactured before 2001 are more likely to think that they would be severely affected (59%) than operators with no such vehicles (31%). Also operators with heavier vans are less likely to think that they would be severely affected (44%) than operators overall (49%).

Businesses (55%) and Operators (39%) are most likely to be affected by the extra cost they may have to pay for deliveries.



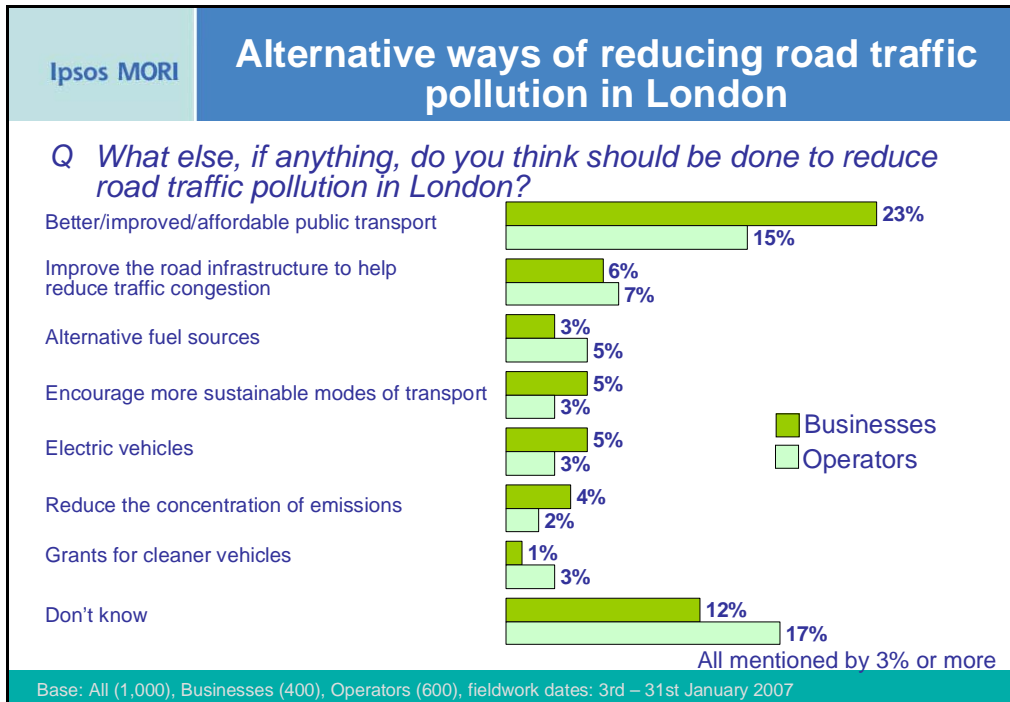
Amongst operators of pre-2001 fleet vehicles, 35% think that they would only make modifications to their vehicles or consider purchase of newer vehicles if a decision was taken to implement the LEZ.



Other ways to reduce road traffic pollution

Improvements in public transport could help reduce road traffic pollution.

On being asked what else could be done to reduce air traffic pollution in London, both businesses (23%) and operators (15%) mention better/improved/more affordable public transport could reduce air pollution further. A significant number of businesses and operators also mentioned improving the road infrastructure to help reduce traffic congestion.



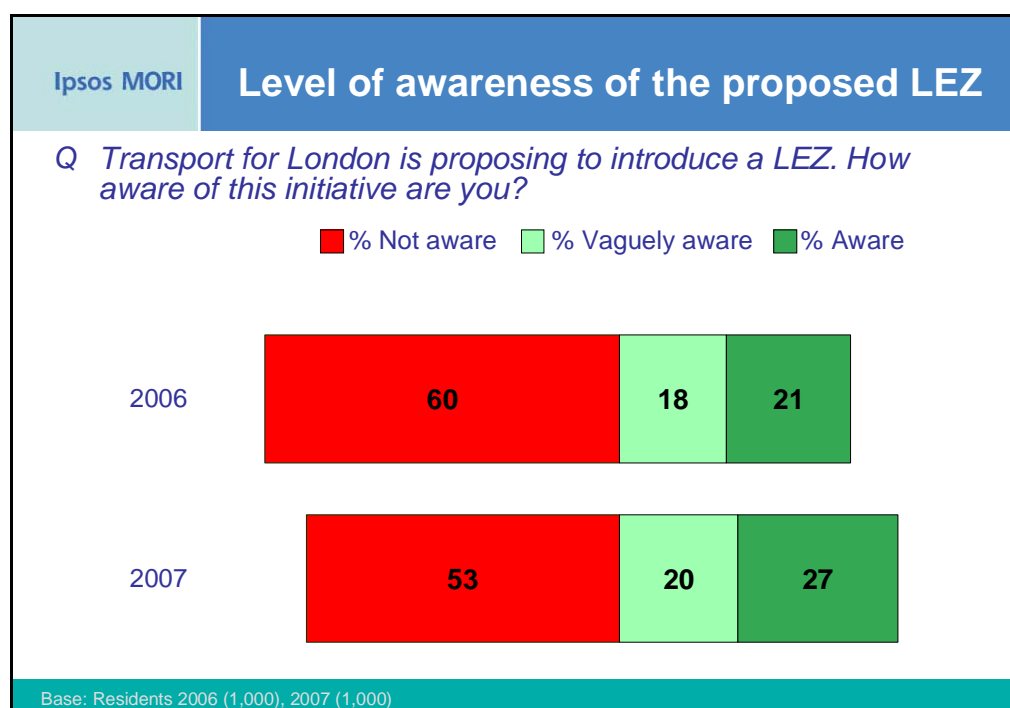
Comparison of 2006 and 2007 findings

Londoners

Awareness of the proposed LEZ and the most recent (Scheme Order) LEZ consultation among Londoners has increased slightly with strong support for the LEZ, although this is marginally lower than in 2006. This was when TfL consulted on Revisions to the Mayor's Air Quality and Transport Strategies. Londoners are slightly more likely to think that the charge is too severe.

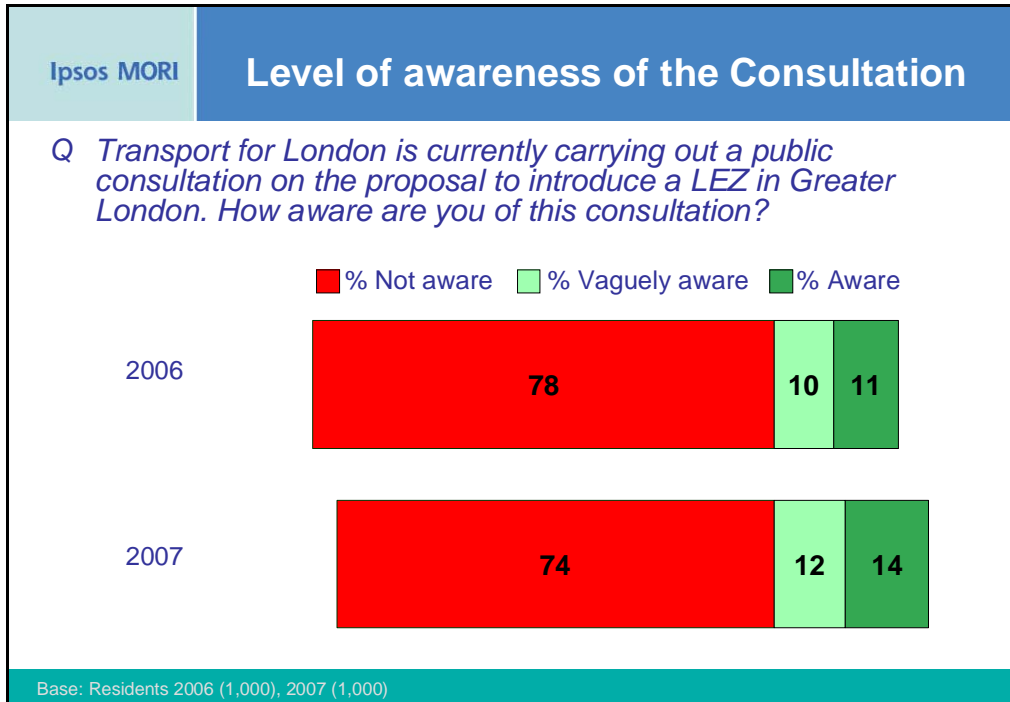
Awareness of the proposed LEZ

Awareness of the proposed LEZ among residents is higher in 2007 with 47% of residents saying they are aware or vaguely aware of the proposal, up eight percentage points since 2006.



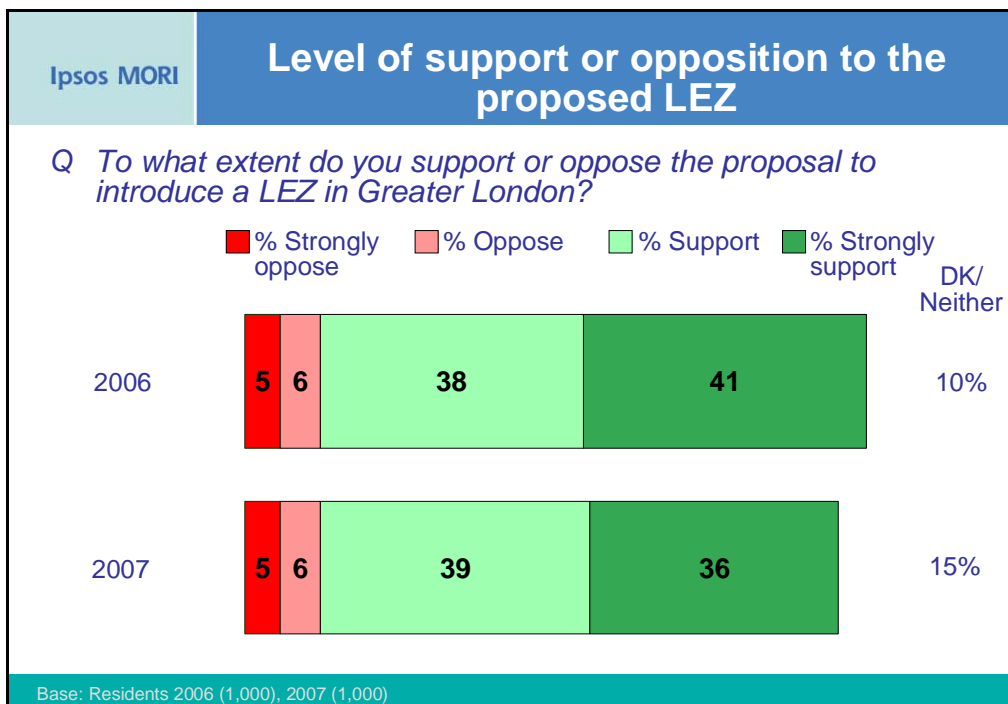
Awareness of the consultation

As well as being more aware of the proposed LEZ, Londoners are also more aware of the 2007 public consultation, than the 2006 consultation. The proportion of those who are aware or vaguely aware of this consultation has risen from 21% in 2006 to 26% in 2007.

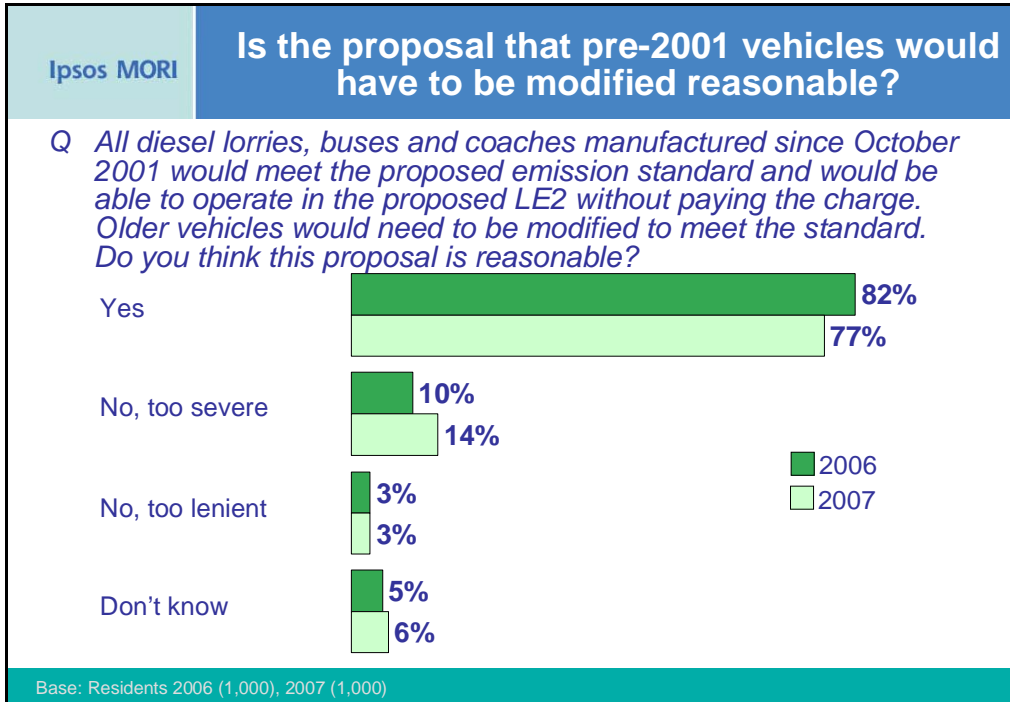


Support for the proposed LEZ

Although Londoners are more aware of the proposed LEZ and of the public consultation, the level of support for the proposal to introduce the LEZ has slightly reduced. Three-quarters of residents support it in 2007 compared to 79% in 2006. Those who are opposed remains stable across the two years, with fewer able to give an opinion either way in 2007.



When asked how reasonable the proposal is that vehicles older than 2001 would have to be modified to meet the emission standard, the proportion agreeing that this is reasonable has reduced slightly from 82% in 2006 to 77% in 2007. The proportion thinking this is too severe has increased slightly from 10% in 2006 to 14% this year. The proportions who think that the LEZ is too severe or too lenient remains low, and over two thirds think it to be reasonable.



Vehicles to which the LEZ should apply

In 2006 the proportion of Londoners who thought that heavier diesel engine vans should be included within the LEZ was 64%. This number has increased significantly by sixteen percentage points, to 80% this year. Although it should be noted that in 2006, this was just worded as ‘vans’. The proportion believing that coaches should be included has also increased five percentage points from 73% in 2006 to 78% in 2007. The numbers saying that HGVs, buses, and minibuses should be included have not changed significantly since 2006.

It is proposed that diesel engined HGVs, buses and coaches would be included within the LEZ from 2008 and heavier diesel engine vans and minibuses from 2010. Which of the following vehicles, if any do you think should be included?

	Residents 2006 %	Residents 2007 %
HGVs ⁵	87	85
Heavier diesel engine vans ⁶	64	80
Coaches	73	78
Buses	75	76
Minibuses	N/A	62
None of these	3	4
Don't Know	3	2

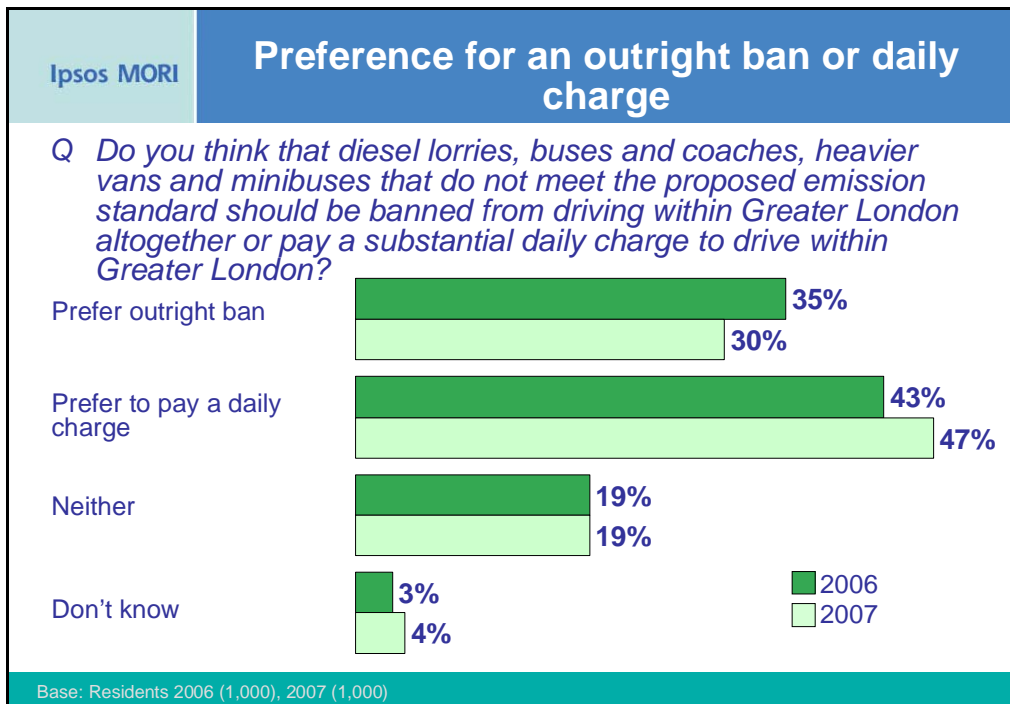
Source: Ipsos MORI

⁵ 2006 code “Lorries (HGVs – heavy goods vehicles)”

⁶ 2006 code “Vans (LGVs – light goods vehicles)”

Support for the proposed charge

Just under half (47%) of Londoners would prefer diesel lorries, buses and coaches, heavier vans and minibuses that do not meet the proposed emission standards to pay a daily charge, consistent with the 2006 findings. The proportion of Londoners preferring an outright ban has fallen since 2006 by five percentage points to 30%. The proportion of residents saying they do not support either a ban or a charge has stayed the same (19%).

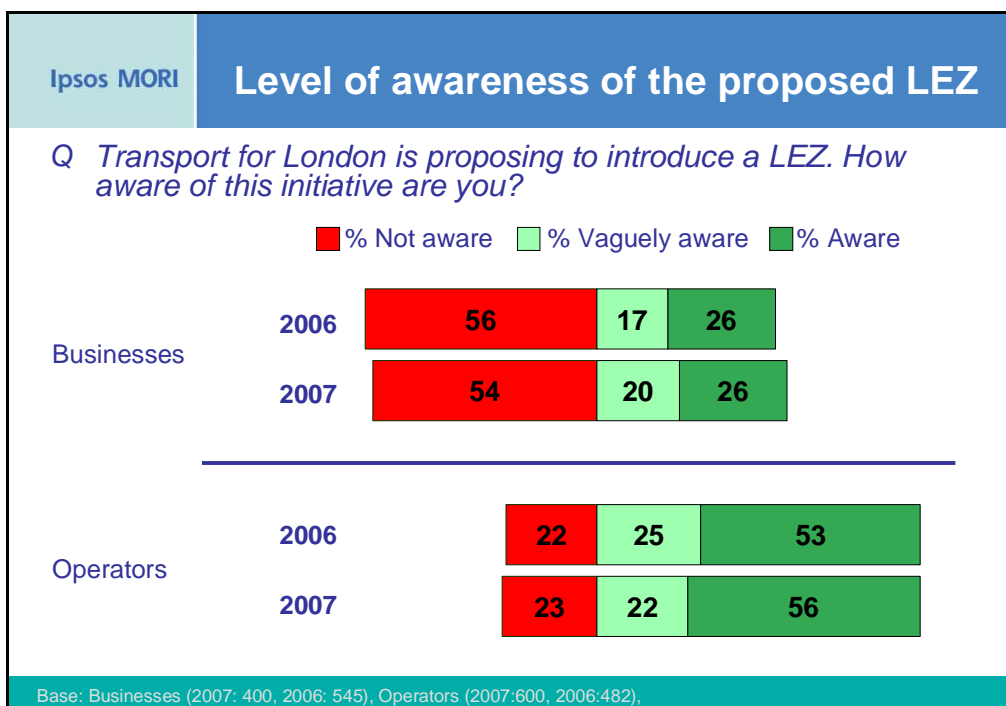


Businesses/Operators

Awareness of and the attitudes of the proposed LEZ have largely remained stable amongst businesses and operators, though there has been an increase in support for the proposed Euro standard emissions approach.

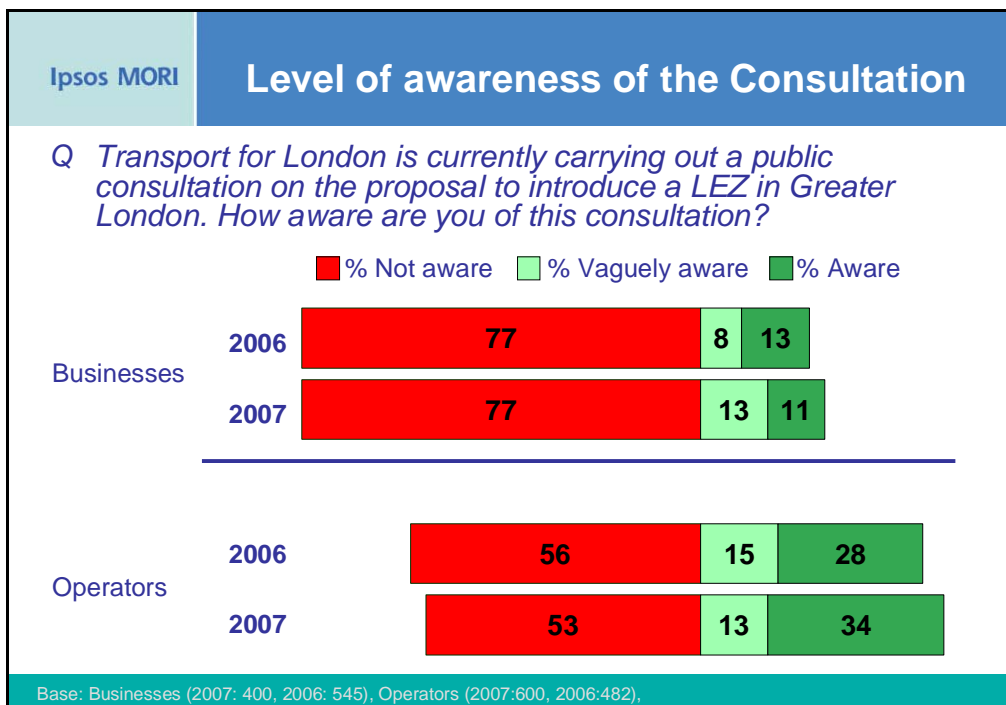
Awareness of the proposed LEZ

Awareness of the proposed LEZ among businesses and operators has not changed significantly since 2006.



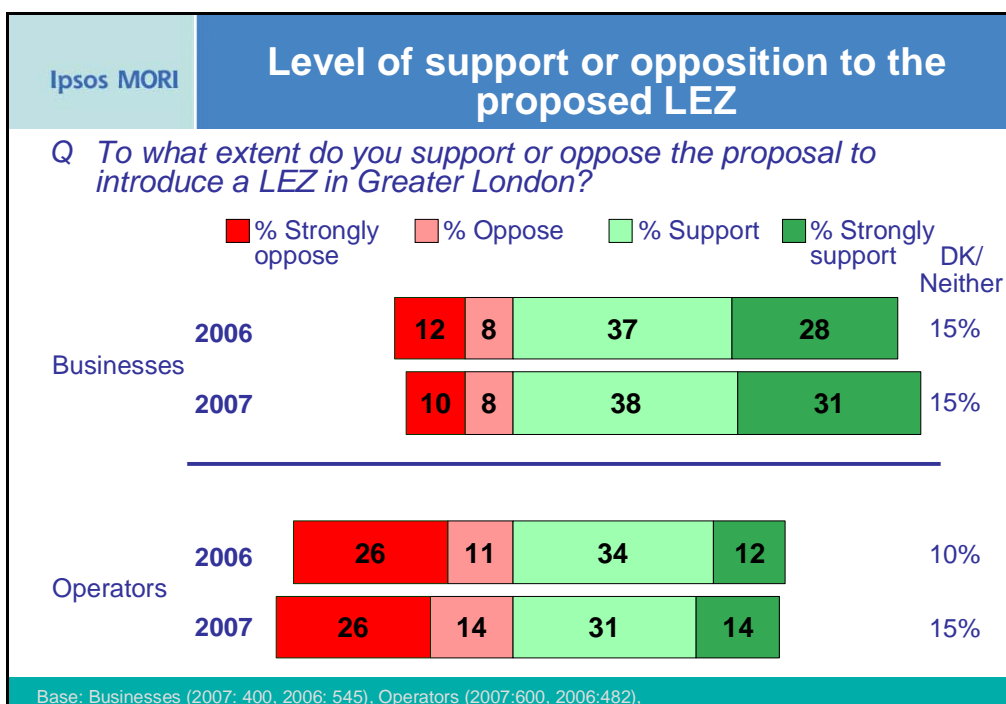
Awareness of the LEZ consultation

There has also been no significant change between 2006 and 2007 in awareness of the public consultation among businesses and operators being carried out by Transport for London on the proposal to introduce a LEZ.

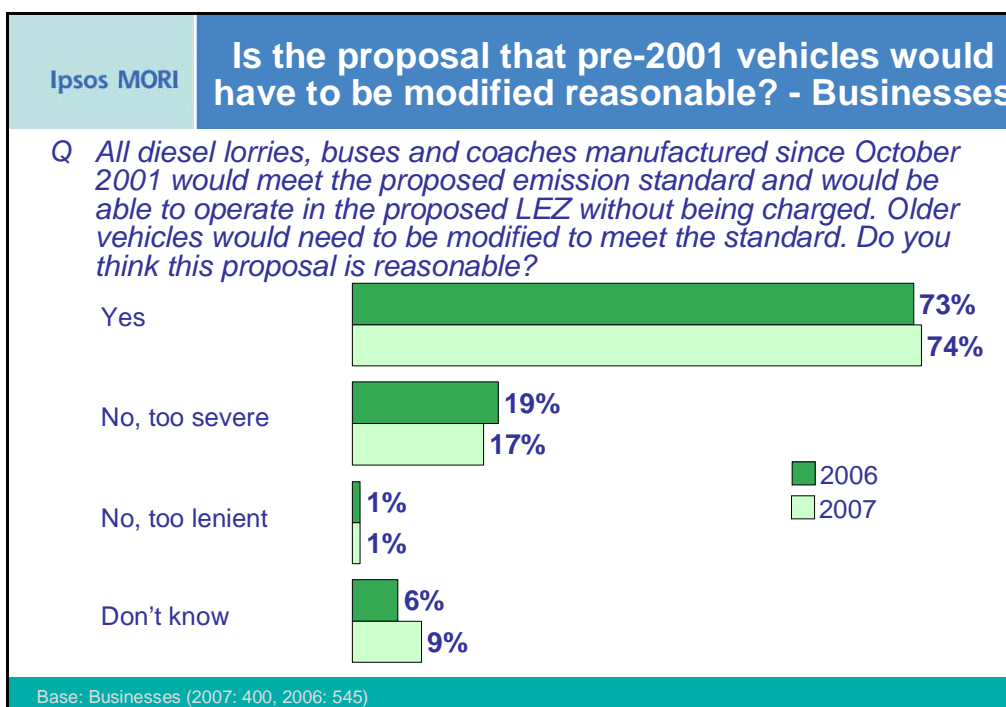


Support for the proposed LEZ

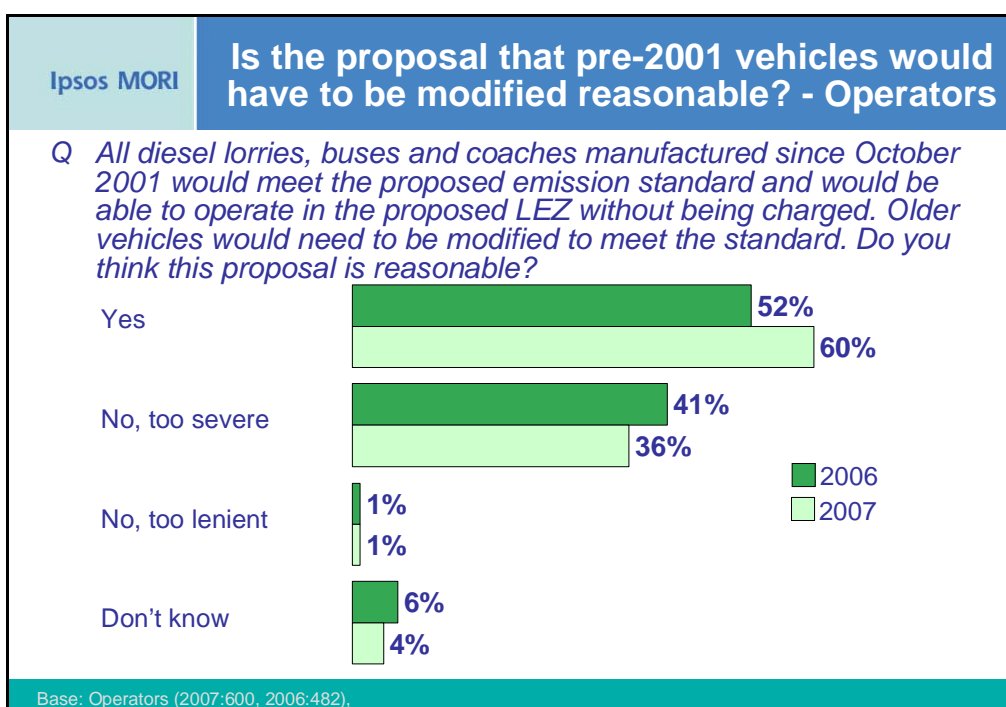
Support and opposition for the proposal to introduce a LEZ in Greater London has not changed significantly between 2006 and 2007 among businesses and operators.



The proportion of businesses who think the proposal that pre-2001 vehicles would need to be modified to meet the emissions standard is reasonable has remained stable, with three quarters agreeing with this (74% in 2007, 73% in 2006).



In contrast, the proportion of operators who think the proposal is reasonable has increased significantly by eight percentage points since 2006 (60% in 2007 and 52% in 2006). There have been less significant changes in the number of operators who think the proposal is too severe or too lenient.



Vehicles to which the LEZ should apply

Businesses and operators were asked which vehicles they thought should be included within the proposed LEZ. Vehicles were categorised slightly differently in 2007 than in the 2006 survey so the results are not directly comparable. This is due to the need to phase in adopting European HGV, bus and coach definitions, and the decision to include heavier LGVs with minibuses in the proposed LEZ.

However, the proportion who think that heavier diesel engine vans (measured as vans in 2006) should be included has increased from 2006 to 2007 (businesses 60% in 2006 and 76% in 2007; operators 54% in 2006 and 67% in 2007). Businesses are more receptive than operators to the LEZ applying to all types of vehicles.

It is proposed that diesel engine HGVs, buses and coaches would be included within the LEZ from 2008 and heavier diesel engine vans and minibuses from 2010. Which of the following vehicles, if any do you think should be included?

	Businesses		Operators	
	2006 %	2007 %	2006 %	2007 %
HGVs ⁷	71 82	84	60 68	70
Heavier diesel engine vans ⁸	60	76	54	67
Coaches ⁹	70 78	81	68 73	74
Buses ¹⁰	72 79	79	69 74	77
Minibuses	N/A	68	N/A	66
None of these	7	6	12	16
Don't Know	5	5	4	2

Source: Ipsos MORI

⁷ 2006 code: Small lorries (3.5 tonnes to 7.5 tonnes HGVs) and Large lorries (Over 7.5 T HGVs)

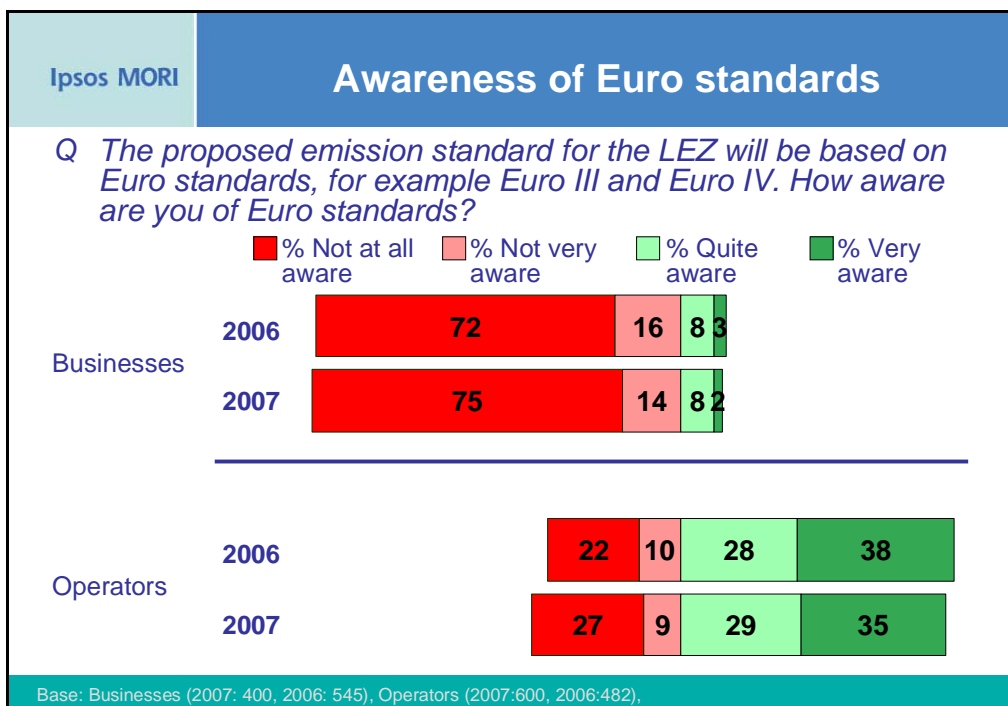
⁸ 2006 code: Vans (Light Goods Vehicle)

⁹ 2006 code: Coaches 17 seats or under and Coaches over 17 seats

¹⁰ 2006 code: Buses 17 seats or under and Buses over 17 seats

Awareness of Euro Standards

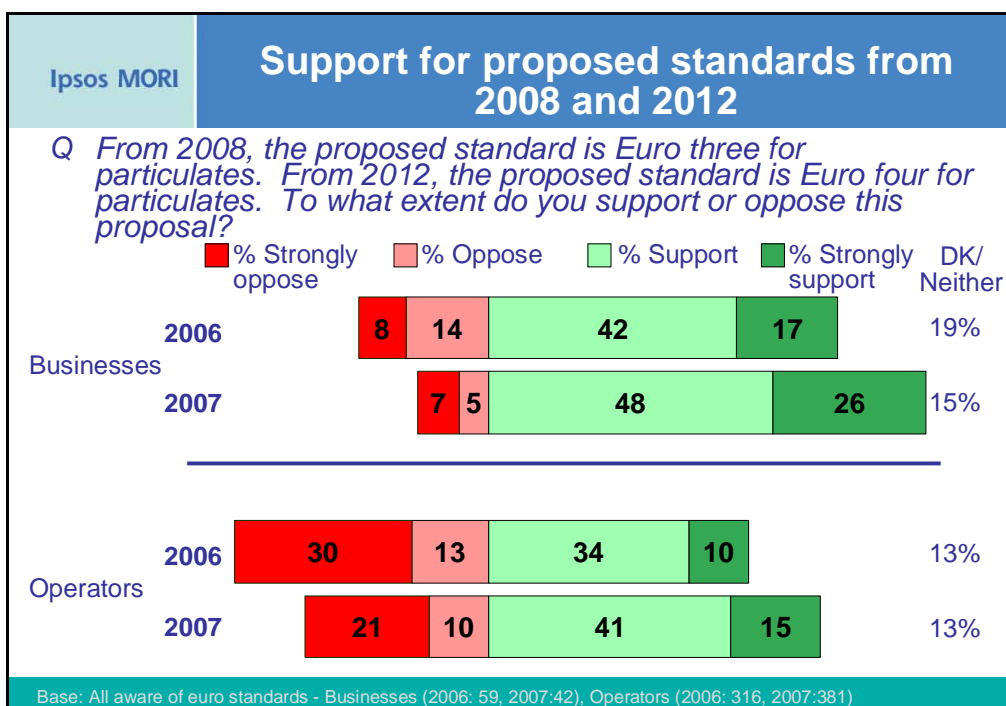
Awareness among businesses and operators of Euro standards has shown no significant change since 2006.



Support for the proposed Standards

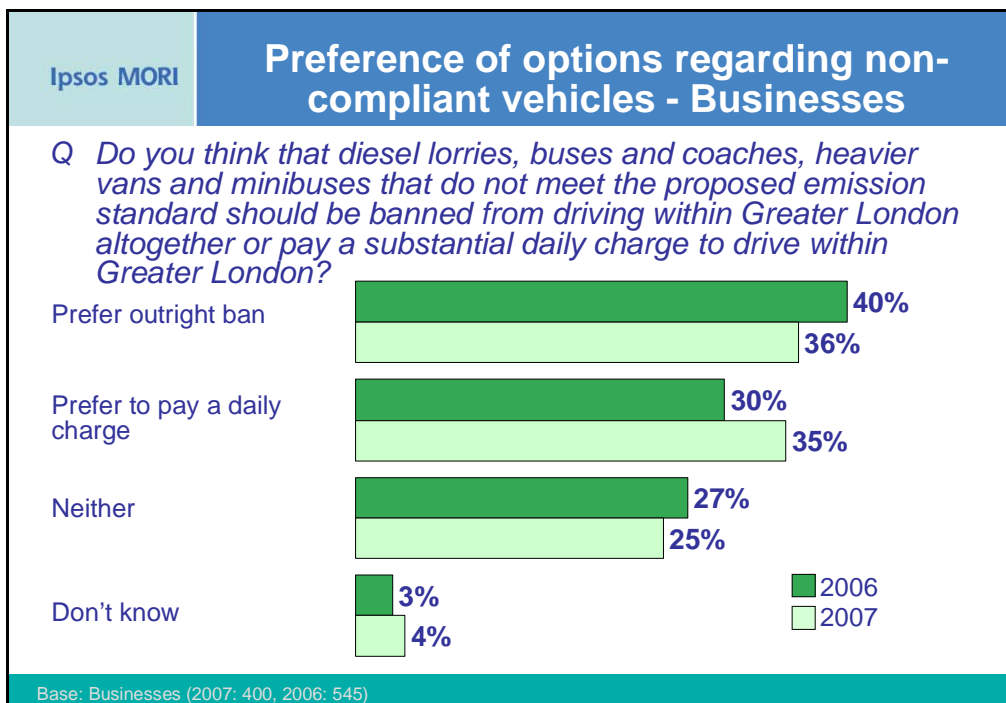
In the 2006 survey, businesses and operators were informed that the proposed standard was Euro 4 for particulates and this would be introduced in 2010. However, following changes to the proposal arising from the previous consultation, in the 2007 survey businesses and operators were told that this standard would be introduced in 2012.

Support for the proposed standards has not changed significantly among businesses (due to the small base size). However there has been a significant increase of twelve percentage points in the proportion of operators who support or strongly support this (43% in 2006 to 56% in 2007).

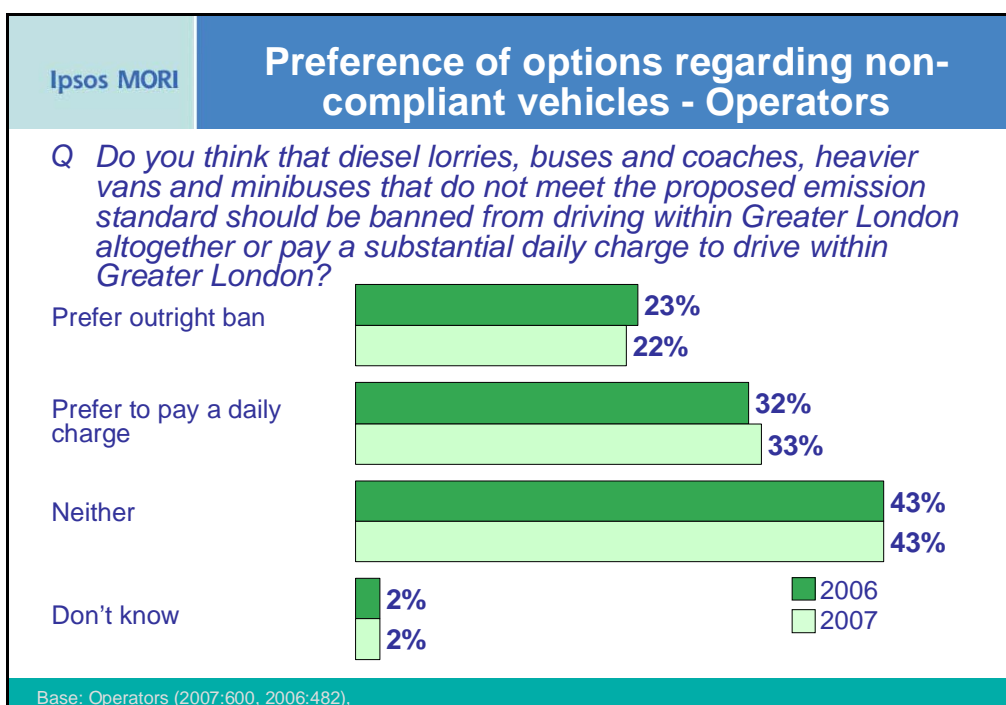


Support for the proposed charge

With regards to preference for an outright ban or a daily charge for vehicles not complying with the proposed emission standard, there has been no significant change in the opinion of businesses between 2006 and 2007.

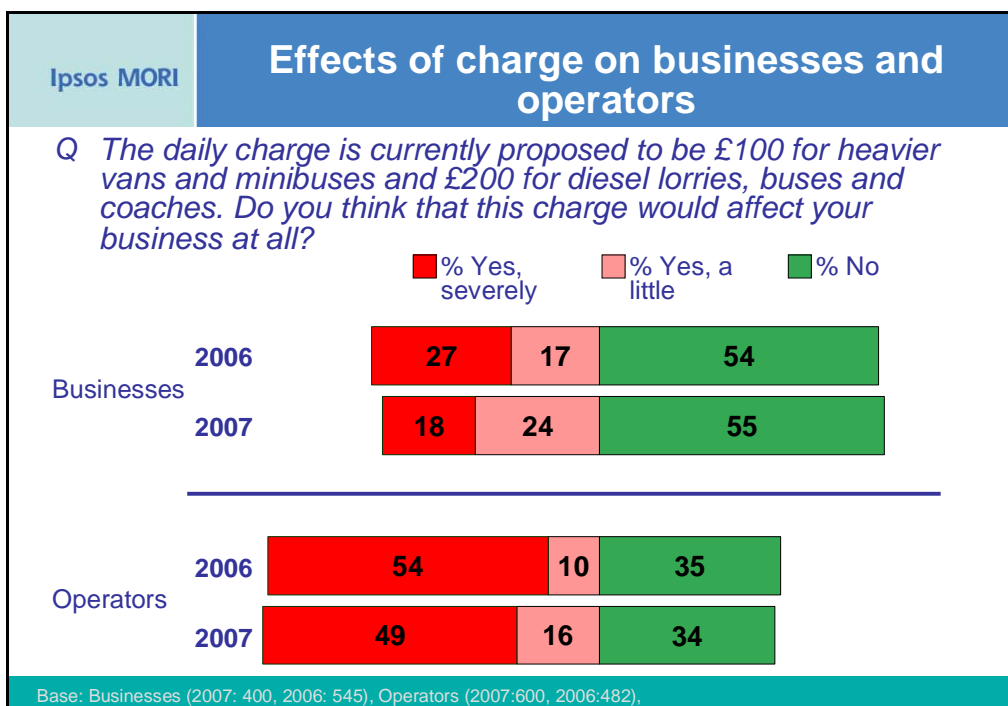


There has also been no significant change in the opinion of operators between 2006 and 2007



Effect of the charge on businesses

The proportion of businesses and operators who think that the charge of £100 for heavier vans and minibuses and £200 for diesel lorries buses and coaches will affect them has not seen any significant change from 2006. The proportion who think that they would be severely affected has fallen slightly, although this is not a significant change.



Appendices

Appendix I	Sample profiles
Appendix II	Residents Topline results
Appendix III	Business/Operator Topline results
Appendix IV	Statistical reliability

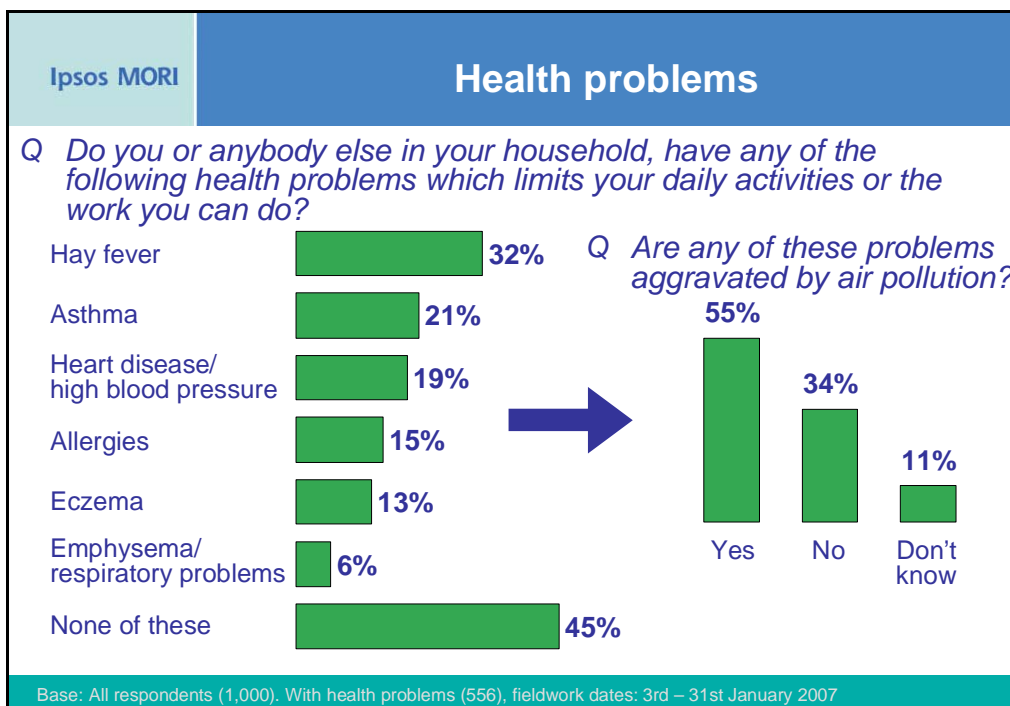
Appendix I Sample profiles

Public demographic profile

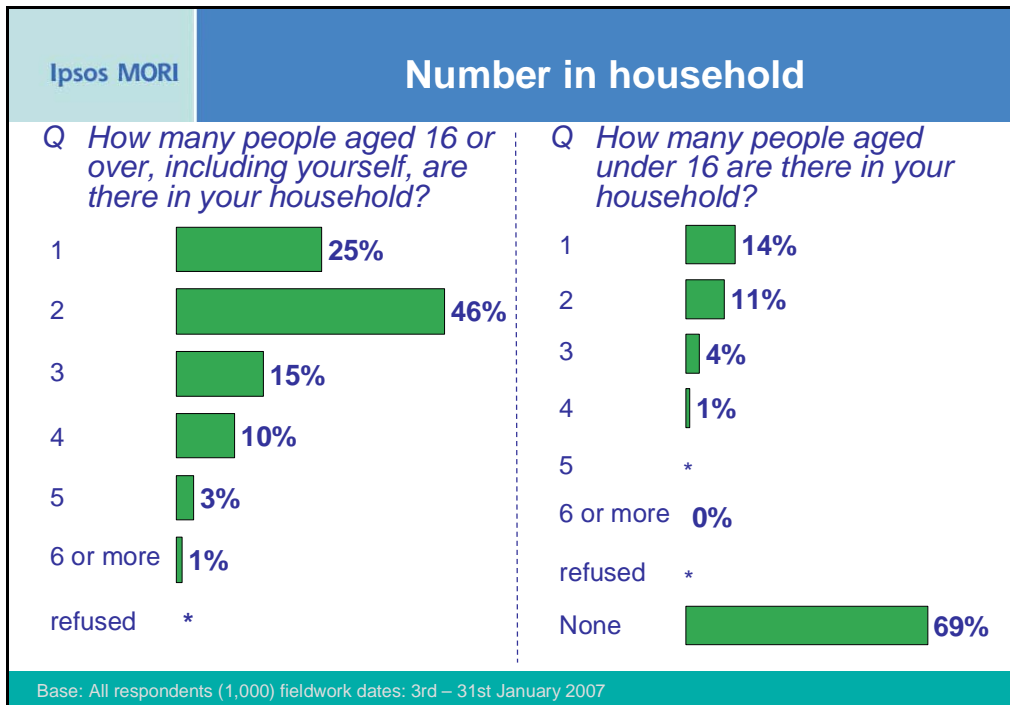
Quotas were set for gender, age and ethnicity against the profile of adults within Greater London and the data were weighted to reflect this profile.

Ipsos MORI		Gender, Age & Ethnicity																																									
<table border="1"> <thead> <tr> <th>Gender</th> <th>%</th> </tr> </thead> <tbody> <tr> <td>Male</td> <td>48</td> </tr> <tr> <td>Female</td> <td>52</td> </tr> </tbody> </table>		Gender	%	Male	48	Female	52	<table border="1"> <thead> <tr> <th>Age</th> <th>%</th> </tr> </thead> <tbody> <tr> <td>16-24</td> <td>15</td> </tr> <tr> <td>25-44</td> <td>44</td> </tr> <tr> <td>45-59</td> <td>19</td> </tr> <tr> <td>60-64</td> <td>6</td> </tr> <tr> <td>65-74</td> <td>8</td> </tr> <tr> <td>75 +</td> <td>7</td> </tr> <tr> <td>Refused</td> <td>1</td> </tr> </tbody> </table>		Age	%	16-24	15	25-44	44	45-59	19	60-64	6	65-74	8	75 +	7	Refused	1	<table border="1"> <thead> <tr> <th>Ethnicity</th> <th>%</th> </tr> </thead> <tbody> <tr> <td>White</td> <td>71</td> </tr> <tr> <td>Asian</td> <td>12</td> </tr> <tr> <td>Black</td> <td>10</td> </tr> <tr> <td>Mixed race</td> <td>3</td> </tr> <tr> <td>Chinese</td> <td>1</td> </tr> <tr> <td>Other</td> <td>3</td> </tr> <tr> <td>Refused</td> <td>2</td> </tr> </tbody> </table>		Ethnicity	%	White	71	Asian	12	Black	10	Mixed race	3	Chinese	1	Other	3	Refused	2
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Other	3																																										
Refused	2																																										
<p>Base: All respondents (1,000) fieldwork dates: 3rd – 31st January 2007</p>																																											

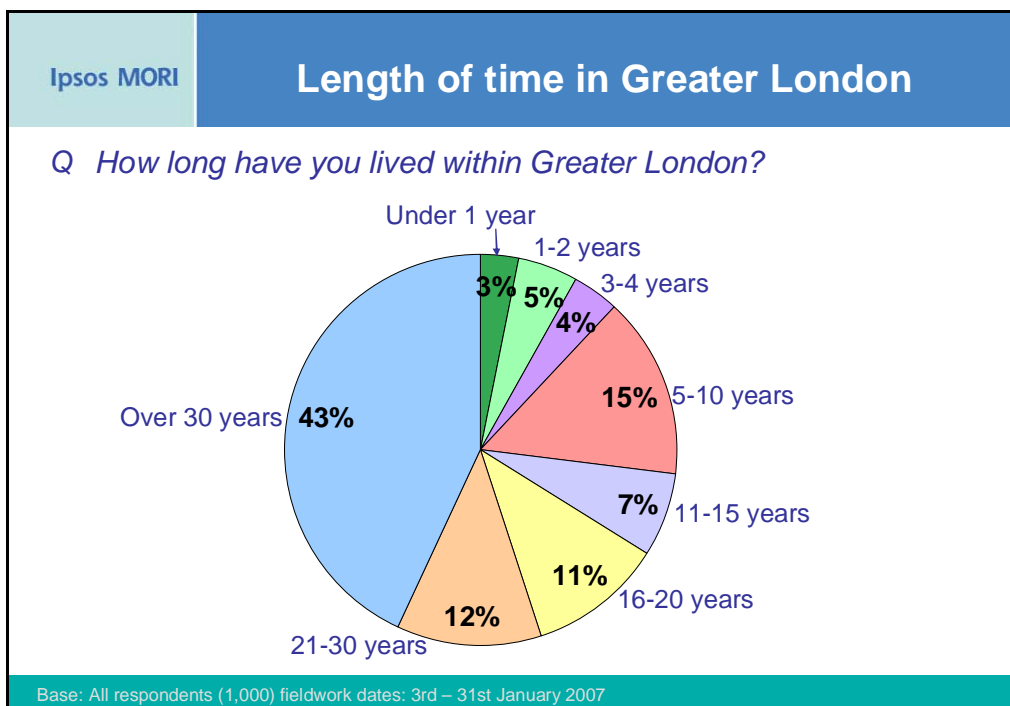
Six different health problems were read out to residents. Of these, 55% suffer from at least one, with the most common being hay fever (32%). Over half of residents (55%) said that their health problems are aggravated by air pollution.



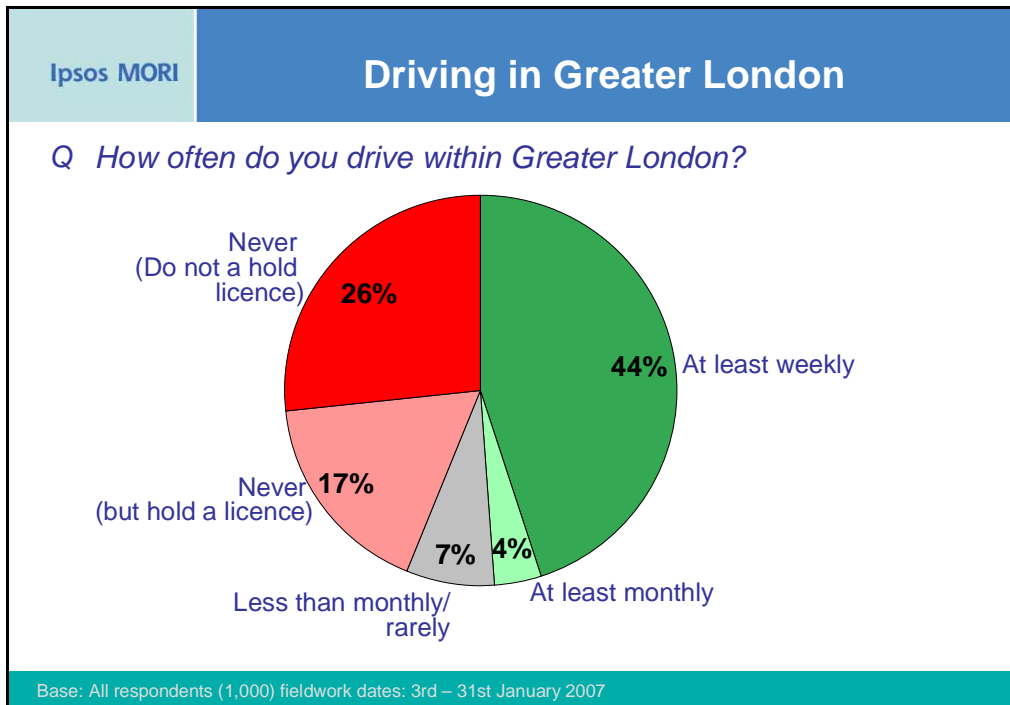
One-quarter of residents have only one adult living in the household and 31% have at least one child living in the household.



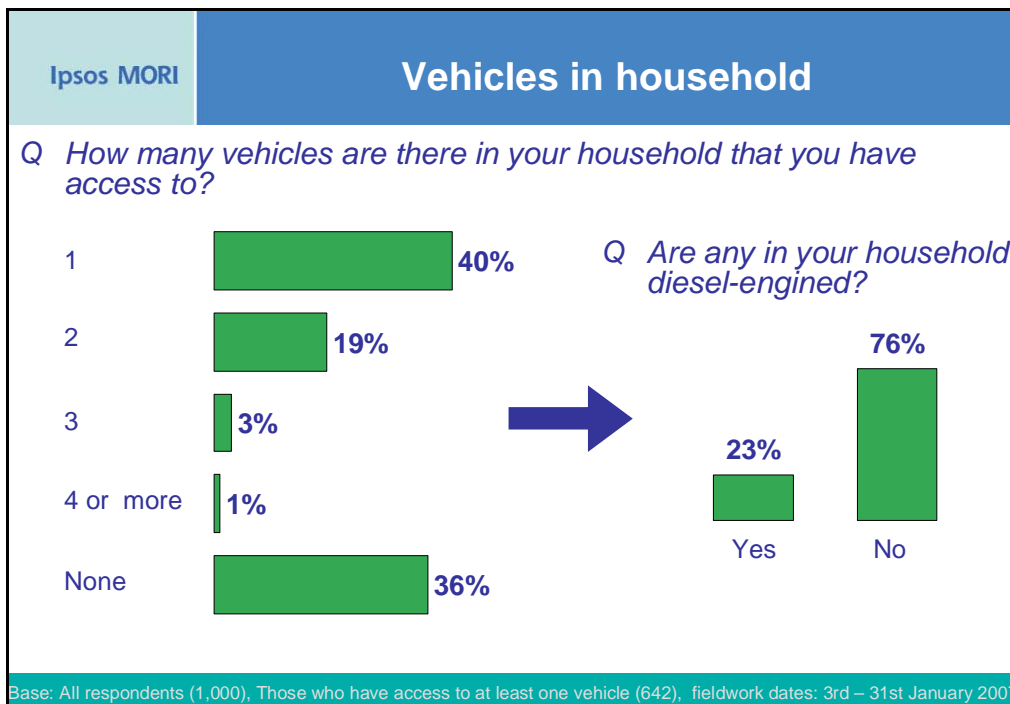
Forty-three percent of residents interviewed have lived in Greater London for over thirty years.



Fifty-six percent of residents interviewed drive in Greater London and 44% drive within Greater London at least weekly.

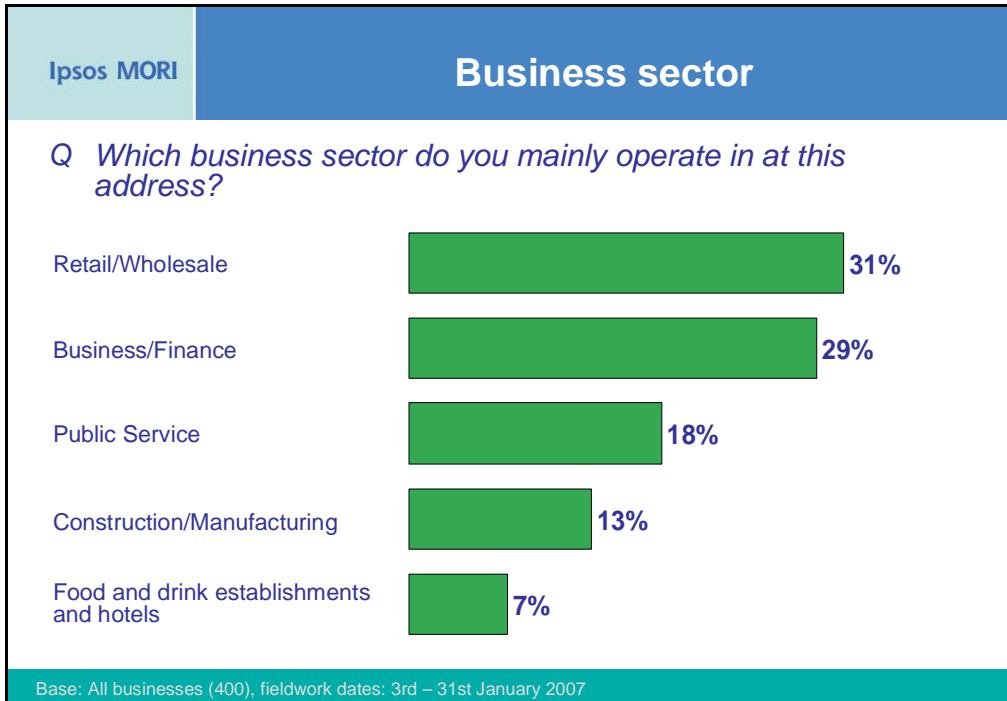


Nearly two-thirds of residents interviewed have access to at least one vehicle in the household. Over one in five residents (23%) with access to a vehicle have a diesel engine vehicle.

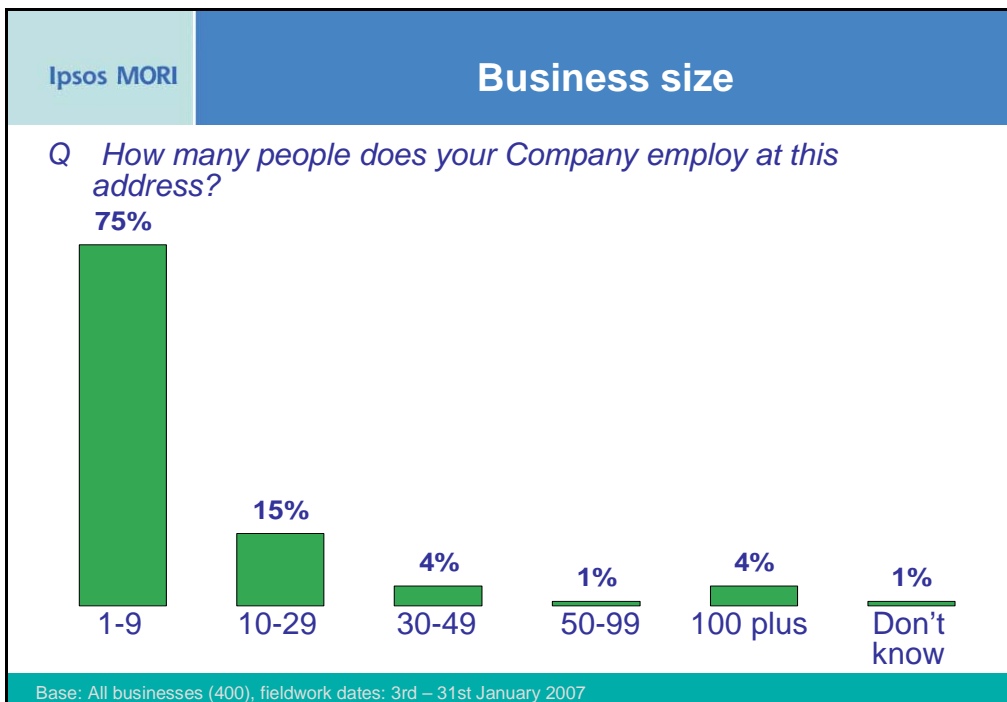


Business profile

Quotas were set on business sector to reflect businesses within Greater London, the most common being businesses in the retail/wholesale sector (31% of interviews).

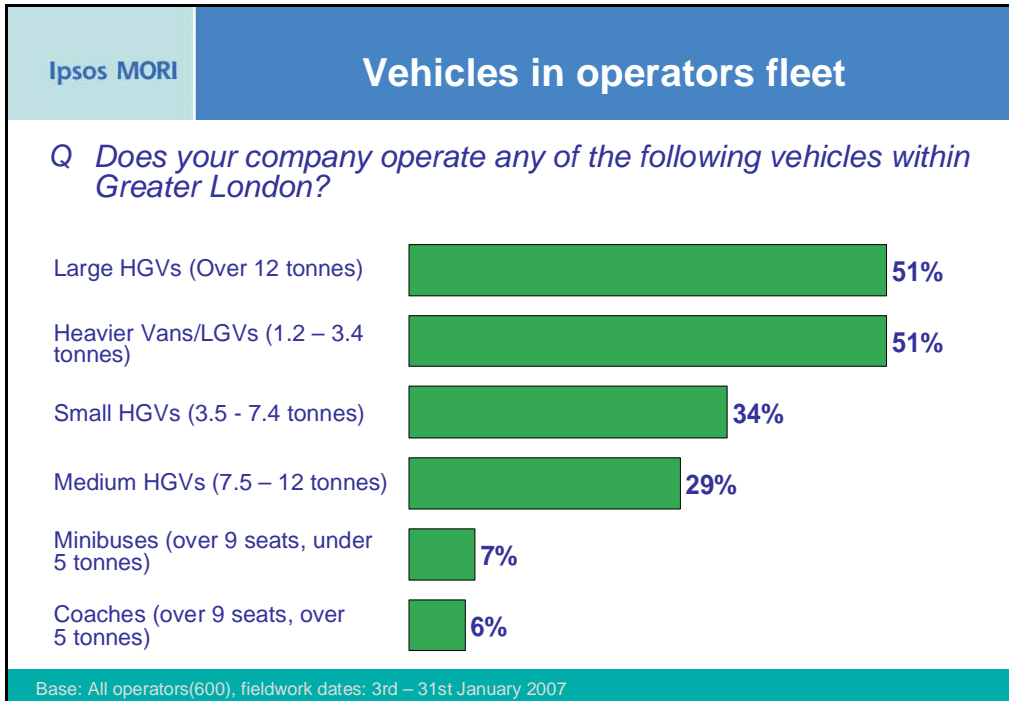


Three-quarters of businesses interviewed employ 1 to 9 employees.

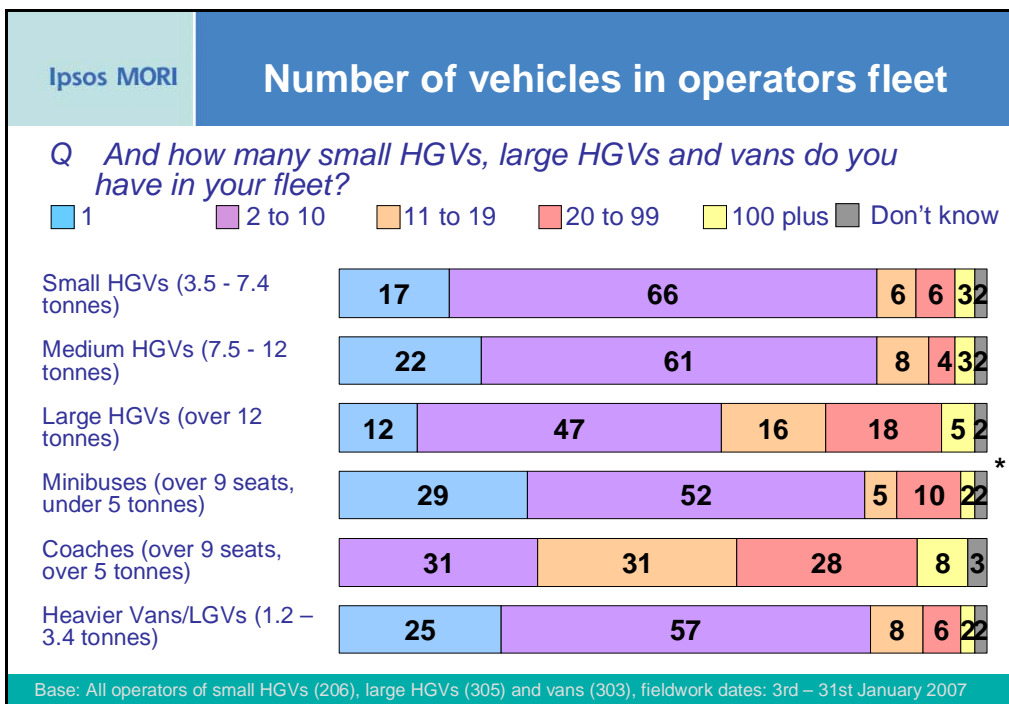


Operator profile

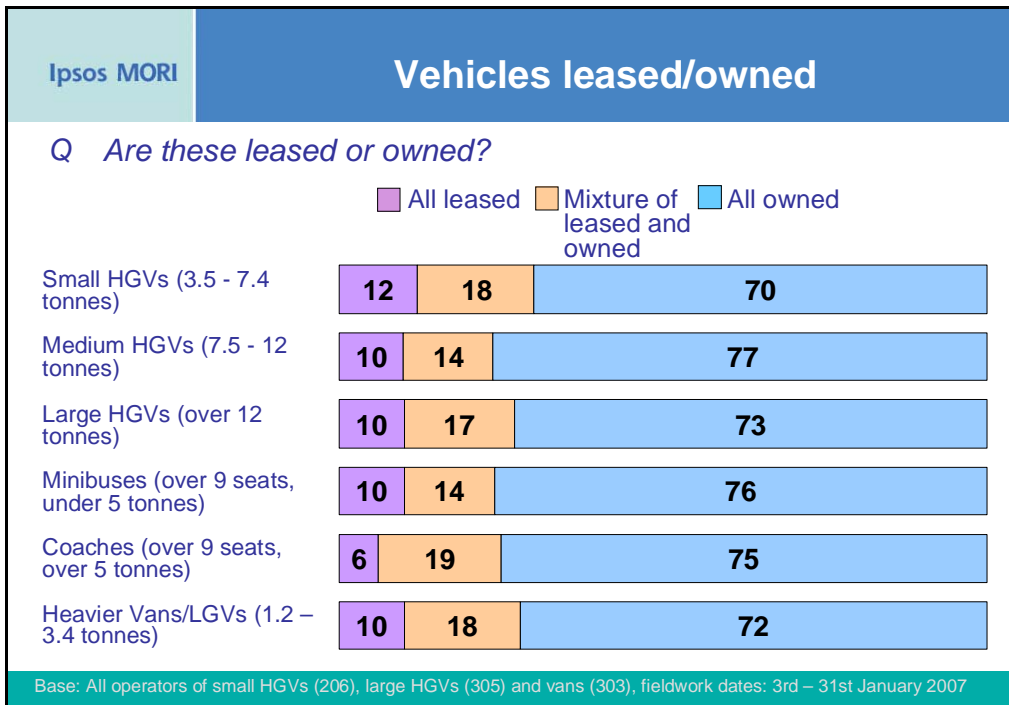
Operators surveyed are most likely to operate Large HGVs and heavier vans (both 51%) within Greater London.



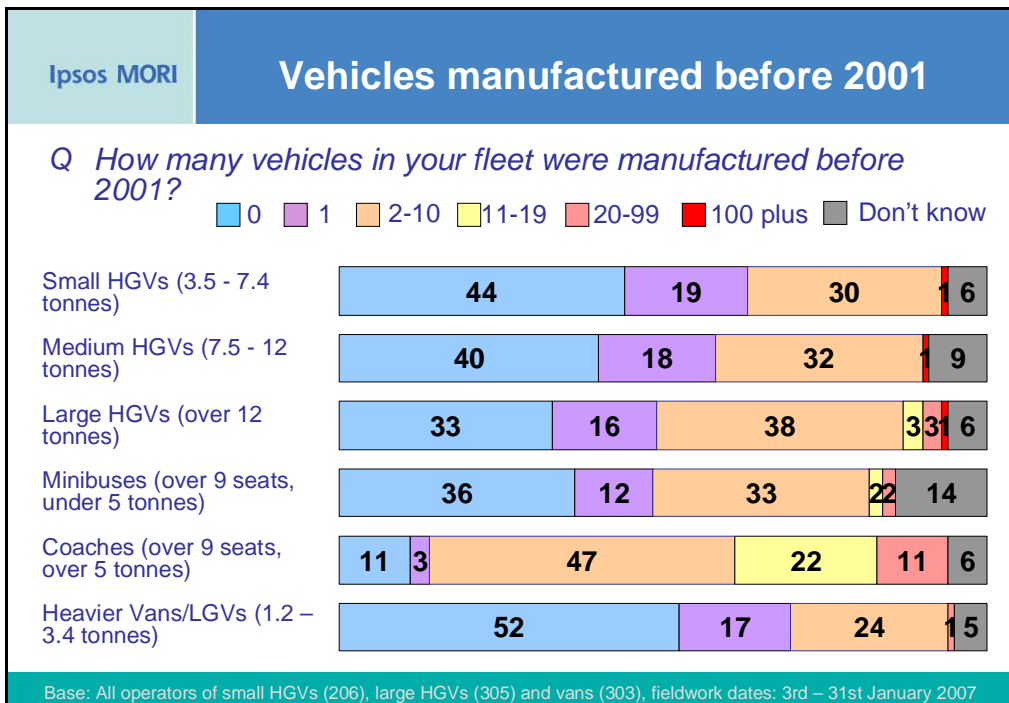
Most operators have ten or less vehicles in their fleet, regardless of vehicle type.



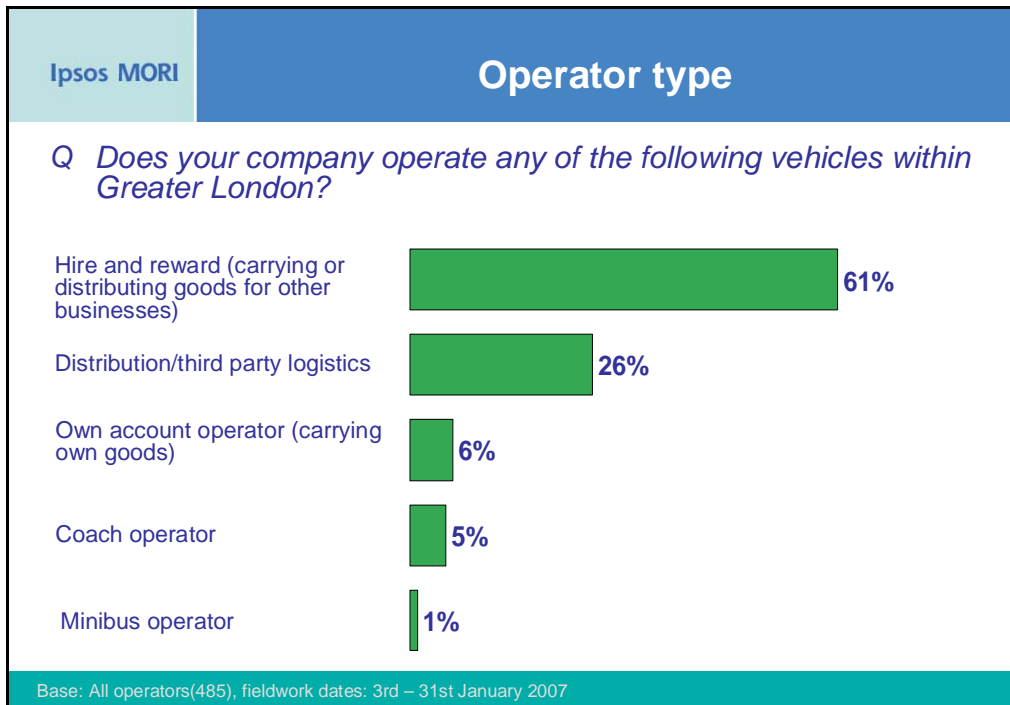
Around three-quarters of operators own all their vehicles, rather than leasing them.



The chart below shows the number of operators who vehicles in their fleet which was manufactured before 2001.



Of the operator sample, six in ten (61%) operate on a 'hire and reward' basis, with a quarter operating on a distribution/ third party logistics basis.



Appendix II London residents Topline results

- Results are based on two waves on data - 1,000 responses per wave
- Fieldwork for wave 1 between 4th – 24th March 2006
- Fieldwork for wave 2 between 3rd – 31st January 2007
- Where results do not sum to 100, this may be due to multiple responses or computer rounding
- Results are based on all respondents unless otherwise stated
- An asterisk (*) represents a value of less than one half of one percent, but not zero
- Results are weighted by gender, age and ethnicity according to the 2001 census in Greater London

Q1. **Firstly could I please check your Post Code, this is purely for classification purposes and we will not pass this information onto anyone else?** USED TO CLASSIFY BOROUGH

	2006 %	2007 %
Barking and Dagenham	2	2
Barnet	5	4
Bexley	4	3
Brent	3	2
Bromley	4	5
Camden	3	2
Croydon	4	5
Ealing	5	4
Enfield	3	3
Greenwich	3	4
Hackney	3	4
Hammersmith and Fulham	1	2
Haringey	3	2
Harrow	2	3
Havering	2	2
Hillingdon	3	3
Hounslow	3	2
Islington	2	2
Kensington and Chelsea	2	1
Kingston upon Thames	1	2
Lambeth	4	6
Lewisham	5	4
Merton	3	3
Newham	5	4
Redbridge	3	3
Richmond upon Thames	3	3
Southwark	3	5
Sutton	3	3
Tower Hamlets	3	4
Waltham Forest	4	5
Wandsworth	4	5
Westminster	2	1
North Greater London (North of the river)	58	53
South Greater London (South of the river)	42	47
Inner Greater London	39	41
Outer Greater London	61	59

- Q2. **How would you describe air quality in London?** READ OUT. SINGLE CODE. IF NEEDS CLARYFYING PROMPT FOR WITHIN GREATER LONDON
Base: All Respondents (1,000)

	2006 %	2007 %
Very good	3	3
Good	26	27
Neither good nor poor	23	26
Poor	35	34
Very poor	10	9
Don't know	2	2

- Q3. **Does air pollution affect you or your family?** READ OUT. SINGLE CODE.
Base: All Respondents (1,000)

	2006 %	2007 %
Yes, very much	19	12
Yes, a little	31	38
Not at all	49	49
Don't know	1	1

- Q4. **Transport for London is proposing to introduce a Low Emission Zone in Greater London from 2008. This Low Emission Zone would seek to improve air quality and the health of Londoners by deterring the most polluting diesel vehicles from driving in Greater London. These vehicles would typically be older lorries, buses and coaches and they would be charged to drive within the zone. How aware of this initiative are you?**¹¹ READ OUT. SINGLE CODE.
Base: All Respondents (1,000)

	2006 %	2007 %
Aware	21	27
Vaguely aware	18	20
Not aware	60	53
Don't know	1	-

- Q5. **To what extent do you support or oppose the proposal to introduce a Low Emission Zone in Greater London?**¹² READ OUT. SINGLE CODE.
Base: All Respondents (1,000)

	2006 %	2007 %
Strongly support	41	36
Support	38	39
Neither support nor oppose	7	13
Oppose	6	6
Strongly oppose	5	5
Don't know	3	2

¹¹ 2006 question wording "How aware of this initiative were you before today?"

¹² 2006 question wording "Do you support or oppose the proposal to introduce a Low Emission Zone in Greater London?"

- Q6. **Transport for London is currently carrying out a public consultation on the proposal to introduce a Low Emission Zone in Greater London. How aware are you of this consultation?** READ OUT. SINGLE CODE.

Base: All Respondents (1,000)

	2006 %	2007 %
Aware	11	14
Vaguely aware	10	12
Not aware	78	74
Don't know	1	-

- Q7. **All diesel lorries, buses and coaches manufactured since October 2001 would meet the proposed emission standard and would be able to operate in the proposed Low Emission Zone without paying the charge¹³. Older vehicles would need to be modified to meet the standard. Do you think this proposal is reasonable?** READ OUT. SINGLE CODE.

Base: All Respondents (1,000)

	2006 %	2007 %
Yes	82	77
No, too severe	10	14
No, too lenient	3	3
Don't know	5	6

- Q8. **It is proposed that diesel engine HGVs, buses and coaches would be included within the LEZ from 2008 and heavier diesel engine vans and minibuses from 2010. Which of the following vehicles, if any do you think should be included?**¹⁴ READ OUT. MULTICODE

Base: All Respondents (1,000)

	2006 %	2007 %
HGVs ¹⁵	87	85
Heavier diesel engine vans ¹⁶	64	80
Coaches	73	78
Buses	75	76
Minibuses	N/A	62
Cars	58	N/A
None of these	3	4
Don't know	3	2

¹³ 2006 question wording "...without a charge..."

¹⁴ 2006 question wording "It is proposed that from 2008 the Low Emission Zone would apply to diesel lorries, buses and coaches. Which diesel vehicles do *you* think the Low Emission Zone should apply to?"

¹⁵ 2006 code "Lorries (HGVs – heavy goods vehicles)"

¹⁶ 2006 code "Vans (LGVs – light goods vehicles)"

Q9. **Are there any other vehicles you think the LEZ should apply to?** READ OUT. MULTICODE

Base: All Respondents (1,000)

	2007 %
Heavier cars	60
All vans (LGVs – Light Goods Vehicles)	49
Other diesel cars	46
Other petrol cars	39
Motorcycles	33
None of these	22
Don't know	3

Q10. **Do you think that diesel lorries, buses and coaches, heavier vans and minibuses that do not meet with the proposed emission standard should be banned from driving within Greater London altogether or pay a substantial daily charge to drive within Greater London?**¹⁷ READ OUT. SINGLE CODE

Base: All Respondents (1,000)

	2006 %	2007 %
Prefer outright ban	35	30
Prefer to pay a daily charge	43	47
Neither	19	19
Don't know	3	4

Q11. a **The current proposal is that diesel lorries, buses and coaches that do not comply with the proposed emission standards should be obliged to pay a daily charge of £200 to drive in Greater London. To what extent do you support or oppose this proposal?** READ OUT. SINGLE CODE.

Base: All Respondents (1,000)

	2007 %
Strongly support	13
Support	22
Neither support nor oppose	14
Oppose	21
Strongly oppose	26
Don't know	3

Q11. b **The current proposal is that heavier vans and minibuses that do not comply with the proposed emission standards should be obliged to pay a charge of £100 to drive in Greater London. To what extent do you support or oppose this proposal?** READ OUT. SINGLE CODE.

Base: All Respondents (1,000)

	2007 %
Strongly support	15
Support	28
Neither support nor oppose	12
Oppose	20
Strongly oppose	22
Don't know	3

¹⁷ 2006 question wording "Do you think that diesel lorries, buses and coaches that do not meet with the proposed emission standard in 2008 should be banned from driving within Greater London altogether or pay a substantial daily charge to drive within Greater London?"

Q12. **What else, if anything, do you think should be done to reduce road traffic pollution in London?**¹⁸ OPEN ENDED

Base: All Respondents (1,000)

	2006 %	2007 %
Better/Improved/Affordable public transport	25	27
Electric vehicles	2	7
Encourage more cyclists by making more cycle lanes	6	7
Improve the road infrastructure to reduce traffic congestion	6	7
Alternative fuel sources	5	4
Increase the catchment area of the congestion zone/Increase congestion charge	6	4
Non transport related alternatives	5	4
Encourage more people to use public transport	2	3
Less cars on the road	13	3
Reduce the concentration of emissions	3	3
Ban instead of charging system	1	2
More advertising / make public more aware	2	2
Tighter MOT controls/standards	1	2
Charge/Ban/Restrict 4x4s/Large vehicles	-	2
Promote/encourage car pooling/sharing	-	2
Apply the same guidelines/Regulations to taxis/Black cabs	1	1
Ban/Impose restrictions on lorries coming into Greater London	2	1
Better parking facilities	1	1
Encourage more sustainable modes of transport	7	1
Extend it to include all forms of transport	2	1
Grants for cleaner vehicles	1	1
HGV vehicles should operate within certain times e.g. early mornings/evenings	1	1
Impose fines for vehicles that fail to comply with regulations	2	1
Increase roadside testing of vehicles	2	1
Make it expensive to use cars e.g. increase taxation for roads/fuel	1	1
Cleaner engines	-	1
More pedestrian areas	-	1
Reduce bus lanes	*	1
Reduce the number of buses/Bendy buses on the roads	1	1
Encourage parents to stop school runs/School buses provided for kids	-	1
Low pressure gas/hydro buses	-	1
Get rid of Ken Livingstone	-	1
One car per household rule	-	1
Reduce aircraft emissions/Stop aeroplanes from flying over Greater London	-	1
Sort out traffic light sequencing	-	1
Should limit unnecessary journeys by car	-	1

¹⁸ 2006 question wording "What else should be done to reduce road traffic pollution in London?"

Disagree with the scheme/Just a money making scheme	1	*
LEZ is best option	1	*
The proposals need to be phased in over time	*	*
Use of road user charging incentives	1	*
Reduce noise pollution	-	*
Reduce/abolish charges	-	*
More park and ride schemes	-	*
Impose number plate system/certain cars on certain days	-	*
Remove/ban older vehicles from the road	-	*
Just allow lorries/HGV/deliveries into London	-	*
Allow other vehicles to use bus lanes	-	*
Restrictions on usage of bus lanes	-	*
It's a Government issue	-	*
Benefits/incentives for cyclists	-	*
Don't limit the scheme to London extend it nationwide	*	-
Put DVLA in charge	0	-
Other	4	7
None/Nothing	4	4
Don't Know	27	26

We would lastly like to ask you a few questions for classification purposes

Q13. **Gender? DO NOT ASK. SINGLE CODE**

Base: All Respondents (1,000)

	2006	2007
	%	%
Male	48	48
Female	52	52

Q14. **How old were you on your last birthday? SINGLE CODE**

Base: All Respondents (1,000)

	2006	2007
	%	%
16-24	15	15
25-44	44	44
45-59	20	19
60-64	5	6
65-74	9	8
75 plus	6	7
Refused	1	1

Q15. **How would you describe your ethnic background? SINGLE CODE**

Base: All Respondents (1,000)

	2006	2007
	%	%
White	71	71
Asian	12	12
Black	11	10
Mixed race	3	3
Chinese	*	1
Other	3	3
Refused	1	2

- Q16. **Do you, or does anybody else in your household, have any of the following health problems which limits your daily activities or the work you can do?** READ OUT.
MULTICODE OK

Base: All Respondents (1,000)

	2006 %	2007 %
Asthma	21	21
Eczema	14	13
Heart disease / High blood pressure	21	19
Allergies	17	15
Hay fever	30	32
Emphysema / respiratory problems	6	6
None of these	47	45
Refused	*	-

- Q17. **Are any of these health problems aggravated by air pollution?** SINGLE CODE

Base: All Respondents who have a health problem (2006: 525. 2007: 556)

	2006 %	2007 %
Yes	61	55
No	39	34
Don't know	-	11

- Q18. **How many people aged 16 or over, including yourself, are there in your household?**

Base: All Respondents (1,000)

	2006 %	2007 %
1	29	25
2	41	46
3	15	15
4	9	10
5	3	3
6 or more	2	1
Don't know	-	*
Refused	1	*

- Q19. **How many people aged under 16, are there in your household?**

Base: All Respondents (1,000)

	2006 %	2007 %
1	14	14
2	12	11
3	5	4
4	1	1
5	*	*
6 or more	*	-
None	68	69
Don't know	-	*
Refused	*	*

Q20. How long have you lived within Greater London? SINGLE CODE

Base: All Respondents (1,000)

	2006 %	2007 %
Under 1 year	4	3
1-2 years	4	5
3-4 years	6	4
5-10 years	13	15
11 – 15 years	6	7
16 – 20 years	12	11
21 – 30 years	13	12
Over 30 years	42	43
Don't Know	*	*

Q21. How often do you drive within greater London? SINGLE CODE.

Base: All Respondents (1,000)

	2006 %	2007 %
5 or more times a week	25	25
2-4 times a week	11	14
Once a week	6	5
At least twice a month	2	2
At least monthly	2	2
Less than monthly	2	2
Rarely	6	5
Never (But hold a driving licence)	18	17
Never (Do not hold a driving licence)	28	26
Don't know	*	-

Q22. How many vehicles are there in your household that you have access to?

Base: All Respondents (1,000)

	2006 %	2007 %
1	43	40
2	17	19
3	3	3
4 or more	2	1
None	35	36

Q23. Are any vehicles in your household diesel-engined? SINGLE CODE

Base: All who have at least one vehicle in the household (2006: 651. 2007: 642)

	2006 %	2007 %
Yes	19	23
No	81	76
Don't Know	1	1

Q24. Thank you very much for taking part in this survey. Transport for London often wish to speak to Londoners to obtain their opinion on transport issues. Would you be happy to take part in any future research? SINGLE CODE

Base: All Respondents (1,000)

	2006 %	2007 %
Yes	79	78
No	20	22
Don't Know	1	*

Appendix III Business/Operator Topline results

- Wave 1 results are based on 1,027 responses – 545 Businesses and 482 Operators
- Wave 2 results are based on 1,000 responses – 400 Businesses and 600 Operators
- Wave 1 fieldwork between 4th – 24th March 2006
- Wave 2 fieldwork between 3rd – 31st January 2007
- Where results do not sum to 100, this may be due to multiple responses or computer rounding
- Results are based on all respondents unless otherwise stated
- An asterisk (*) represents a value of less than one half or one percent, but not zero

BUSINESS SCREENER

S2a **Which business sector do you mainly operate in at this address?** SINGLE CODE
Base: All Businesses

	Business 2006 (545) %	Business 2007 (400) %
Construction (including builders and contractors)	2	5
Manufacturing	7	4
Repair services	4	3
Garages	1	2
Agriculture	0	1
Wholesale	6	4
Retail (shops and petrol stations)	24	26
Pubs, restaurants and cafes	6	6
Hotel / B&B / Guest Houses / camp sites	1	1
Tourism (Tourist attractions such as museums and art galleries and Tourist information)	1	2
Social services / education services / health services	11	8
Utilities (Gas / electric / water services / telecommunications)	1	2
Other services for the public (for example post offices, libraries, citizen advice)	8	6
Finance (Banks, investment offices, stock brokers)	9	9
Insurance	1	1
Estate Agents	2	3
Other small office based businesses	14	16
Other	*	2
Refused	-	1
Retail / Wholesale	31	31
Construction/Manufacturing/Transportation	16	13
Food and drink establishments and hotels	7	7
Public services	21	18
Business/Finance	26	29

S3a **Is your company headquarters or any regional offices situated within Greater London?**

Base: All Businesses

	Business 2006 (545) %	Business 2007 (400) %
Yes	100	100
No	-	-

S4a **Does your company operate any of the following vehicles within Greater London?**
READ OUT. MULTICODE. IN 2007 BUSINESSES COULD NOT HAVE ANY OF THESE VEHICLES TO QUALIFY FOR THE SURVEY

Base: All Businesses

	Business 2006 (545) %	Business 2007 (400) %
Small HGVs (3.5-7.4 tonnes)	4	-
Medium HGVs (7.5 - 12 tonnes) ¹⁹	2	-
Large HGVs (Over 12 tonnes)		-
Minibuses	NA	-
Coaches	*	-
Heavier Vans ²⁰	21	-
None of these	75	100

OPERATOR SCREENER

S2b **Does your company operate any of the following vehicles within Greater London?** READ OUT. MULTICODE

Base: All Operators

	Operator 2006 (482) %	Operator 2007 (600) %
Small HGVs (3.5-7.4 tonnes)	39	34
Medium HGVs (7.5 - 12 tonnes) ²¹	68	29
Large HGVs (Over 12 tonnes)		51
Minibuses	NA	7
Coaches	2	6
Heavier Vans ²²	41	51
None of these	-	-

¹⁹ 2006 Business code: Large HGV (Over 7.5 tonnes)

²⁰ 2006 Business code: Van

²¹ 2006 Operator code: Large HGV (Over 7.5 tonnes) – applies to questions S2b to S6b

²² 2006 Operator code: Van – applies to questions S2b to S6b

S3b **How many vehicles of the following size do you have in your fleet? SINGLE CODE**

Base: All who operate type of vehicle

	Small HGV 3.5-7.5t		Large HGV Over 7.5t		Medium HGV 7.5-12t	Large HGV Over 12t	Mini-bus	Coaches		Heavier Vans	
	2006 (189) %	2007 (206) %	2006 (329) %	2007 (176) %	2007 (305) %	2007 (42) %	2006 (9) %	2007 (36) %	2006 (199) %	2007 (303) %	
1	19	17	12	22	12	29	11	-	31	25	
2 to 10	61	66	47	61	47	52	22	31	49	57	
11 to 19	10	6	18	8	16	5	33	31	9	8	
20 to 99	7	6	18	4	18	10	22	28	9	6	
100 plus	2	3	5	3	5	2	11	8	2	2	
Don't Know	2	2	*	2	2	2	-	3	-	2	

S4b **How often does your company operate Small HGVs, Medium HGV, Large HGVs, Heavier vans, Minibuses and coaches within Greater London? SINGLE CODE**

Base: All who operate type of vehicle

	Small HGV 3.5-7.5t		Large HGV Over 7.5t		Medium HGV 7.5-12t	Large HGV Over 12t	Mini-bus	Coaches		Heavier Vans	
	2006 (189) %	2007 (206) %	2006 (329) %	2007 (176) %	2007 (305) %	2007 (42) %	2006 (9) %	2007 (36) %	2006 (199) %	2007 (303) %	
7 days a weeks	13	16	14	8	12	38	22	33	18	17	
4-6 days a week	28	26	29	33	32	17	11	14	33	40	
1-3 days a week	26	33	21	33	35	21	22	22	23	25	
Once every two weeks	8	17	8	16	14	10	0	25	8	11	
Once a month	11	3	13	6	4	7	22	-	5	2	
Less frequently	14	3	16	1	2	7	22	3	14	3	
Never	-	2	-	3	1	-	-	3	-	2	

S5b **Are these vehicles leased or owned? SINGLE CODE FOR EACH**

Base: All who operate type of vehicle

	Small HGV 3.5-7.5t		Large HGV Over 7.5t		Medium HGV 7.5-12t	Large HGV Over 12t	Mini-bus	Coaches		Heavier Vans	
	2006 (189) %	2007 (206) %	2006 (329) %	2007 (176) %	2007 (305) %	2007 (42) %	2006 (9) %	2007 (36) %	2006 (199) %	2007 (303) %	
All leased	12	12	8	10	10	10	-	6	10	10	
All owned	75	70	78	77	73	76	67	75	77	72	
Mixture of leased and owned	14	18	14	14	17	14	33	19	13	18	

S6b **How many vehicles in your fleet were manufactured before 2001? SINGLE CODE FOR EACH**

Base: All who operate type of vehicle

	Small HGV 3.5-7.5t		Large HGV Over 7.5t	Medi um HGV 7.5- 12t	Large HGV Over 12t	Mini- bus	Coaches		Heavier Vans	
	2006 (189) %	2007 (206) %	2006 (329) %	2007 (176) %	2007 (305) %	2007 (42) %	2006 (9) %	2007 (36) %	2006 (199) %	2007 (303) %
0	32	44	23	40	33	36	22	11	43	52
1	20	19	12	18	16	12	0	3	24	17
2-10	40	30	51	32	38	33	33	47	28	24
11-19	1	-	6	-	3	2	33	22	1	*
20-99	2	-	4	-	3	2	11	11	1	1
100+	1	1	2	1	1	-	-	-	1	*
Don't Know	5	6	2	9	6	14	-	6	3	5

S7b **Which of the following best describes the nature of your company? If you have more than one of the following please tell me which covers the most mileage. READ OUT. SINGLE CODE.**

Base: All Operators who were classified as operators from the sample

	Operator 2006 (482) %	Operator 2007 (485) %
Hire and reward (Carrying or distributing goods for other businesses)	61	61
Own account operator (Carrying own goods)	12	6
Distribution/ third party logistics	25	26
Minibus operator	NA	1
Coach operator	2	5
Social and Community Groups	NA	*
Other	-	1
Don't Know	-	*

MAIN QUESTIONNAIRE

Q1 **How would you describe air quality in London? READ OUT. SINGLE CODE.**

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Very good	2	1	4	1
Good	26	22	26	37
Neither good nor poor	25	30	21	19
Poor	33	35	18	16
Very poor	8	7	3	3
Don't know	7	6	28	24

Q2 **Transport for London is proposing to introduce a Low Emission Zone in Greater London from 2008. This Low Emission Zone would seek to improve air quality and the health of Londoners by deterring the most polluting diesel vehicles from driving in Greater London. These vehicles would typically be older lorries, buses and coaches and they would be charged to drive within the zone if they did not meet the prescribed emission standards. How aware of this initiative are you?**²³ READ OUT. SINGLE CODE.

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Aware	26	26	53	56
Vaguely aware	17	20	25	22
Not aware	56	54	22	23
Don't know	1	-	*	-

Q3 **To what extent do you support or oppose the proposal to introduce a Low Emission Zone in Greater London?**²⁴ READ OUT. SINGLE CODE.

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Strongly support	28	31	12	14
Support	37	38	34	31
Neither support nor oppose	11	11	15	12
Oppose	8	8	11	14
Strongly oppose	12	10	26	26
Don't know	3	4	3	3

Q4 **Transport for London is currently carrying out a public consultation on the proposal to introduce the Low Emission Zone. How aware are you of this consultation?** READ OUT. SINGLE CODE.

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Aware	13	11	28	34
Vaguely aware	8	13	15	13
Not aware	77	77	56	53
Don't know	1	-	*	-

²³ 2006 question wording: How aware of this initiative were you before today?

²⁴ 2006 question wording: Do you support or oppose the proposal to introduce a Low Emission Zone in Greater London?

Q5 All diesel lorries, buses and coaches manufactured since October 2001 would meet the proposed emission standard and would be able to operate in the proposed Low Emission Zone without being charge²⁵. Older vehicles would need to be modified to meet the standard. Do you think this proposal is reasonable? READ OUT. SINGLE CODE.

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Yes	73	74	52	60
No, too severe	19	17	41	36
No, too lenient	1	1	1	1
Don't know	6	9	6	4

Q6 It is proposed that diesel engined HGVs, buses and coaches would be included within the LEZ from 2008 and heavier diesel engine vans and minibuses from 2010. Do you think these vehicles should be included?²⁶ READ OUT. MULTICODE

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
HGVs ²⁷	71	84	60	70
Buses ²⁸	72	79	69	77
Coaches ²⁹	70	81	68	74
Heavier diesel engined vans/LGVs ³⁰	60	76	54	67
Minibuses	NA	68	NA	66
None of these	7	6	12	16
Don't know	5	5	4	2

Q7 Are there any other vehicles you think the LEZ should apply to READ OUT. MULTICODE

Base: All Businesses / Operators

	Business (400) 2007 %	Operator (600) 2007 %
All vans (LGVs – Light Goods Vehicles)	48	53
Heavier cars	49	55
Other diesel cars	41	51
Other petrol cars	37	49
Motorcycles	32	37
None of these	34	32
Don't know	5	2

²⁵ 2006 question wording: 'without a charge'

²⁶ 2006 question wording: It is proposed that from 2008 the Low Emission Zone would apply to diesel lorries, buses and coaches. Which diesel vehicles do you think the Low Emission Zone should apply to?

²⁷ 2006 code: Small lorries (3.5 tonnes to 7.5 tonnes HGVs) and Large lorries (Over 7.5 tonnes HGVs)

²⁸ 2006 code: Buses 17 seats or under and Buses over 17 seats

²⁹ 2006 code: Coaches 17 seats or under and Coaches over 17 seats

³⁰ 2006 code: Vans (Light Goods Vehicle)

Q8a **The proposed emission standard for the Low Emission Zone will be based on Euro standards for example Euro three and Euro four. How aware are you of Euro standards?**
 READ OUT. SINGLE CODE
 Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Very aware	3	2	38	35
Quite aware	8	8	28	29
Neither aware nor unaware	2	1	2	1
Not very aware	16	14	10	9
Not at all aware	72	75	22	27

Q8b **From 2008, the proposed standard is Euro three for particulates. From 2012, the proposed standard is Euro four for particulates To what extent do you support or oppose this proposal?**³¹ READ OUT. SINGLE CODE.
 Base: All aware of Euro standards

	Business		Operator	
	2006 (59) %	2007 (42) %	2006 (316) %	2007 (381) %
Strongly support	17	26	10	15
Support	42	48	34	41
Neither support nor oppose	3	10	9	10
Oppose	14	5	13	10
Strongly oppose	8	7	30	21
Don't know	15	5	4	3

Q9 **Do you think that diesel lorries, buses and coaches, heavier vans and minibuses that do not meet the proposed emission standard should be banned from driving within Greater London altogether or pay a substantial daily charge to drive within Greater London?**³²
 READ OUT. SINGLE CODE
 Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Prefer outright ban	40	36	23	22
Prefer to pay a daily charge	30	35	32	33
Neither	27	25	43	43
Don't know	3	4	2	2

³¹ 2006 question wording: From 2008, the proposed standard is Euro three for particulates. From 2010, the proposed standard is Euro four for particulates. Transport for London is considering extending the standard from 2010 to Euro four for both particulates and oxides of nitrogen. Do you support or oppose this proposal?

³² 2006 question wording: Do you think that diesel lorries, buses and coaches that do not meet with the proposed emission standard in 2008 should be banned from driving within Greater London altogether or pay a substantial daily charge to drive within Greater London?

Q10a **The current proposal is that diesel lorries, buses and coaches that do not comply with the proposed emission standards should be obliged to pay a daily charge of £200 to drive in Greater London. To what extent do you support or oppose this proposal?**

Base: All Businesses / Operators

	Business 2007 (400) %	Operator 2007 (600) %
Strongly support	10	7
Support	24	11
Neither support nor oppose	9	3
Oppose	20	18
Strongly oppose	36	59
Don't know	3	1

Q10b **The current proposal is that heavier vans/LGVs and minibuses that do not comply with the proposed emission standards should be obliged to pay a daily charge of £100 to drive in Greater London. To what extent do you support or oppose this proposal?**

Base: All Businesses / Operators

	Business 2007 (400) %	Operator 2007 (600) %
Strongly support	10	8
Support	26	16
Neither support nor oppose	7	3
Oppose	20	18
Strongly oppose	34	55
Don't know	4	1

Q11 **The daily charge is currently proposed to be between £100 for heavier vans and minibuses and £200 for diesel lorries, buses and coaches. Do you think that this charge would affect your business at all?³³ READ OUT SINGLE CODE**

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Yes, severely	27	18	54	49
Yes, a little	17	24	10	16
No	54	55	35	34
Don't know	3	3	1	2

³³ 2006 question wording: The daily charge is currently proposed to be between £100 and £200. Do you think that this charge would affect your business at all?

Q12 **How would your business be affected?** DO NOT READ OUT. MULTICODE OK
 Base: All whose business will be affected

	Business		Operator	
	2006 (238) %	2007 (168) %	2006 (310) %	2007 (387) %
It will cost more to make deliveries	43	55	28	39
Will make fewer journeys within Greater London	5	3	13	22
Will have to pay the charge	14	12	18	21
Will have to lay off staff / will go out of business	5	5	8	14
Will no longer operate non-compliant vehicles within Greater London	5	1	28	11
Will have to replace vehicles	1	1	7	9
Will have to make changes to existing vehicles	1	1	5	5
Would have to pass the cost onto our customers	3	3	8	5
Customer numbers would drop/would lose customers	12	11	5	5
It will affect profit margins	*	1	1	3
Increased expense/Cost to the company	8	13	2	3
Relocate	1	-	*	1
Will have to move the business out of London	1	1	-	1
Will effect competitiveness/can't compete	-	1	-	1
It will increase our income/more business	-	2	-	1
It will make us more competitive	-	-	-	1
Public transport costs will rise	1	1	-	*
It will cost more to receive deliveries	6	13	-	*
Just another tax/charge	-	1	-	*
Delivery times will take longer/unable to deliver on time	-	1	-	-
Other	11	3	5	3
Don't Know	3	1	1	1
None / won't affect us	*	-	1	*

Q13 When do you propose taking this action? READ OUT. SINGLE CODE ONLY

Base: All who propose making changes to vehicles or replacing vehicles.

	Business		Operator	
	2006 (4) %	2007 (3) %	2006 (34) %	2007 (44) %
Before summer 2007, when the final decision could be made on whether or not to go ahead with a Low Emission Zone	-	-	32	27
Only if the decision was made to go ahead with the Low Emission Zone proposal, currently expected in summer 2007	75	33	21	39
Only after the proposed scheme launch in January 2008	-	67	41	32
Don't know	25	-	6	2

Q14 What else should be done to reduce road traffic pollution in London? OPEN ENDED

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Better/Improved/Affordable public transport	19	23	13	15
Improve the road infrastructure to help reduce traffic congestion	6	6	11	7
Alternative fuel sources	5	3	1	5
Electric vehicles	3	5	3	3
Encourage more sustainable modes of transport	5	5	4	3
Grants for cleaner vehicles	1	1	1	3
Less cars on the road	10	2	15	3
Make it expensive to use cars e.g. increase taxation for roads / Fuel	2	2	2	3
Take cars off the road completely	-	1	-	3
Can companies/manufacturers should bear the burden/Be responsible for educating	-	1	-	3
HGV vehicles should operate within certain times early mornings / evenings	2	2	3	2
Increase roadside testing of vehicles	2	2	2	2
Increase the catchment area of the congestion zone/Increase congestion charge	3	1	1	2
Reduce the concentration of emissions	11	4	12	2
Reduce the number of buses/Bendy buses on the road	3	2	3	2
Tighter MOT controls and standards	3	2	2	2
Remove/ban older vehicles from the road	-	2	-	2
Promote/encourage car pooling/sharing	-	2	-	2

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (545) %	2007 (400) %
Just allow lorries/HGV/deliveries into London	-	1	-	2
Cleaner engines	-	1	-	2
Should limit unnecessary journeys by car	-	1	-	2
Charge foreign drivers for coming into London	-	-	-	2
Apply the same guidelines/Regulations to taxis/Black cabs	2	1	2	1
Ban / Impose restrictions on lorries coming into Greater London	1	2	2	1
Ban instead of a charging system	2	3	3	1
Disagree with the scheme/Just a money making scheme	*	1	1	1
Don't limit the scheme to London extend it nationwide	1	-	2	1
Encourage more cyclists by making more cycle lanes	3	5	1	1
Encourage more people to use public transport	2	1	2	1
Extend it to include all forms of transport	1	*	1	1
Impose fines/Restrictions for vehicles that fail to comply with regulations	2	2	3	1
LEZ is best option	2	*	2	1
More advertising/More public awareness	1	1	*	1
Non-transport related alternatives	4	1	3	1
The proposals should be phased in overtime	1	1	2	1
Encourage parents to stop school runs/School buses provided for kids	-	2	-	1
More pedestrian areas	-	2	-	1
Reduce/abolish charges	-	1	-	1
Sort out traffic light sequencing	-	1	-	1
Get rid of Ken Livingstone	-	1	-	1
Charge/ban/restrictions on 4x4s/large vehicles	-	1	-	1
More Park and Ride schemes	-	1	-	1
Get illegal drivers off the road	-	1	-	1
It's a Government issue	-	1	-	1
Better parking facilities	2	2	1	*
Reduce bus lanes	*	-	*	*
Use of road user charging incentives	3	1	2	*
Low pressure gas/hydro buses	-	1	-	*
Reduce aircraft emissions/Stop aeroplanes from flying over Greater London	-	1	-	*
Cheaper low emission cars	-	1	-	*

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (545) %	2007 (400) %
Allow other vehicles to use bus lanes	-	*	-	*
One car per household rule	-	-	-	*
Impose number plate system/Certain cars on certain days	-	1	-	-
Restrictions on usage of bus lanes	-	*	1	1
Other	6	6	7	5
Don't Know	3	12	6	17
None/Nothing	3	18	5	14
Refused	-	-	1	-

We would lastly like to ask you some questions about your business for classification purposes

Q15 What is the post code of the address where you work?

Base: All Businesses / Operators

	Business		Operator	
	2006 (545) %	2007 (400) %	2006 (482) %	2007 (600) %
Barking and Dagenham	1	2	1	1
Barnet	2	2	1	1
Bexley	1	2	2	1
Brent	2	3	*	*
Bromley	3	2	1	1
Camden	6	7	1	1
City of London	2	4	-	*
Croydon	2	13	*	1
Ealing	3	4	1	1
Enfield	3	4	1	2
Greenwich	1	2	1	2
Hackney	3	2	-	1
Hammersmith and Fulham	3	4	*	1
Haringey	4	2	-	1
Harrow	1	2	1	1
Havering	*	3	1	*
Hillingdon	1	2	1	1
Hounslow	2	2	1	1
Islington	4	1	-	1
Kensington and Chelsea	5	5	1	1
Kingston upon Thames	1	2	1	*
Lambeth	3	4	*	1
Lewisham	2	4	*	*
Merton	1	2	1	1
Newham	2	3	*	1
Redbridge	1	1	1	1
Richmond upon Thames	3	1	*	1
Southwark	4	5	*	1
Sutton	1	5	1	1
Tower Hamlets	3	2	1	*
Waltham Forest	2	2	*	1
Wandsworth	4	1	*	1
Westminster	15	5	1	1
Unknown area in London	7	6	-	5
Not in Greater London	-	-	54	72
Don't know	-	-	24	-

Q16 What is the area in which you work? SINGLE CODE

Base: All Operators who don't work in Greater London

	Operator 2007 (430) %
South East	27
South West	13
East Midlands	10
West Midlands	12
East Anglia	8
Wales	3
North East	5
North West	9
Yorkshire and Humberside	8
Scotland	3
Refused	1

Q17 How many people does your Company employ at this address? SINGLE CODE

Base: All Businesses / Operators

	Business		Operator	
	2006 % (545)	2007 % (400)	2006 % (482)	2007 % (600)
1-9	77	75	42	46
10-29	14	15	33	26
30-49	3	4	9	11
50-99	1	1	7	8
100 plus	3	4	7	7
Don't know	1	1	2	1
Refused	-	1	-	*

Q18 Thank you very much for taking part in this survey. Transport for London often wish to speak to Londoners to obtain their opinion on transport issues. Would you be happy to take part in any future research? SINGLE CODE

Base: All Businesses / Operators

	Business		Operator	
	2006 % (545)	2007 % (400)	2006 % (482)	2007 % (600)
Yes	76	77	73	82
No	24	23	26	18
Don't Know	*	-	1	1

Appendix IV Statistical Reliability

When interpreting the findings it is important to remember that the results are based on a sample of the population, and not the entire population. We cannot therefore be certain that the figures obtained are exactly those we would have if everybody had been interviewed (the 'true' values). However, we can predict the variation between the sample results and the 'true' values from a knowledge of the size of the samples on which the results are based and the number of times that a particular answer is given.

The confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 19 in 20 that the 'true' value will fall within a specified range. The table below illustrates the predicted ranges for different sample sizes and percentages results at the '95% confidence interval', based on a random sample. For example, with a sample size of 1,000 where 30% give a particular answer, the margin of error/specified range will be plus or minus three per cent.

Sample Size	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90%	30% or 70%	50%
	±	±	±
50	8	13	14
100	6	9	10
500	3	4	4
1,000	2	3	3

Source: Ipsos MORI

Thus, the confidence interval (or margin of error) is the amount by which the survey result could increase or decrease and still be considered to reflect the 'true' result that would have been recorded if everyone in the population had been surveyed.

In addition, when comparing subgroups, if we assume a “95% confidence interval”, the differences between the results of two samples must be greater than the values given in the table below:

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90%	30% or 70%	50%
	±	±	±
530 residents in north London <i>versus</i> 470 residents in south London	4	6	6
298 residents who rate air quality as good <i>versus</i> 422 residents who rate air quality as poor	5	7	7
400 businesses <i>versus</i> 600 operators	4	6	6
298 businesses with 1-9 employees <i>versus</i> 94 businesses with 10 or more employees	7	11	12
170 operators in Greater London <i>versus</i> 430 operators outside Greater London	5	8	9

Source: Ipsos MORI

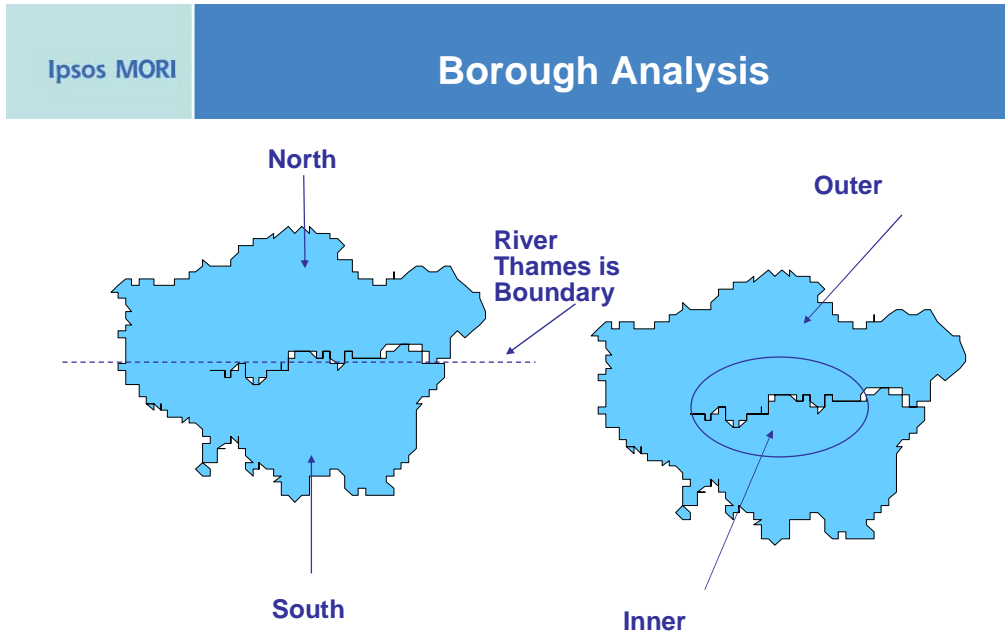
In addition, when comparisons can also be made between years, if we assume a “95% confidence interval”, the differences between the results of two samples for 2006 and 2007 must be greater than the values given in the table below:

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90%	30% or 70%	50%
	±	±	±
1,000 residents in 2006 <i>versus</i> 1,000 residents in 2007	3	4	4
482 operators in 2006 <i>versus</i> 600 operators in 2007	4	6	6
545 businesses in 2006 <i>versus</i> 400 businesses in 2007	4	6	7

Source: Ipsos MORI

Appendix V Borough Analysis

For analysis purposes Greater London was split into North and South London and inner and outer London as follows:



North London	South London
Barking & Dagenham	Bexley
Barnet	Bromley
Brent	Croydon
Camden	Greenwich
City of London	Kingston-upon-Thames
City of Westminster	Lambeth
Ealing	Lewisham
Enfield	Merton
Hackney	Richmond-upon-Thames
Hammersmith & Fulham	Southwark
Haringey	Sutton
Ealing	Wandsworth
Havering	
Hillingdon	
Hounslow	
Islington	
Kensington & Chelsea	
Newham	
Redbridge	
Tower Hamlets	
Waltham Forest	

Inner London	Outer London
Camden	Barking & Dagenham
City of London	Barnet
City of Westminster	Bexley
Greenwich	Brent
Hackney	Bromley
Hammersmith & Fulham	Croydon
Haringey	Ealing
Islington	Enfield
Kensington & Chelsea	Harrow
Lambeth	Havering
Newham	Hillingdon
Southwark	Hounslow
Tower Hamlets	Kingston-upon-Thames
Wandsworth	Lewisham
	Merton
	Redbridge
	Richmond-upon-Thames
	Sutton
	Waltham Forest

