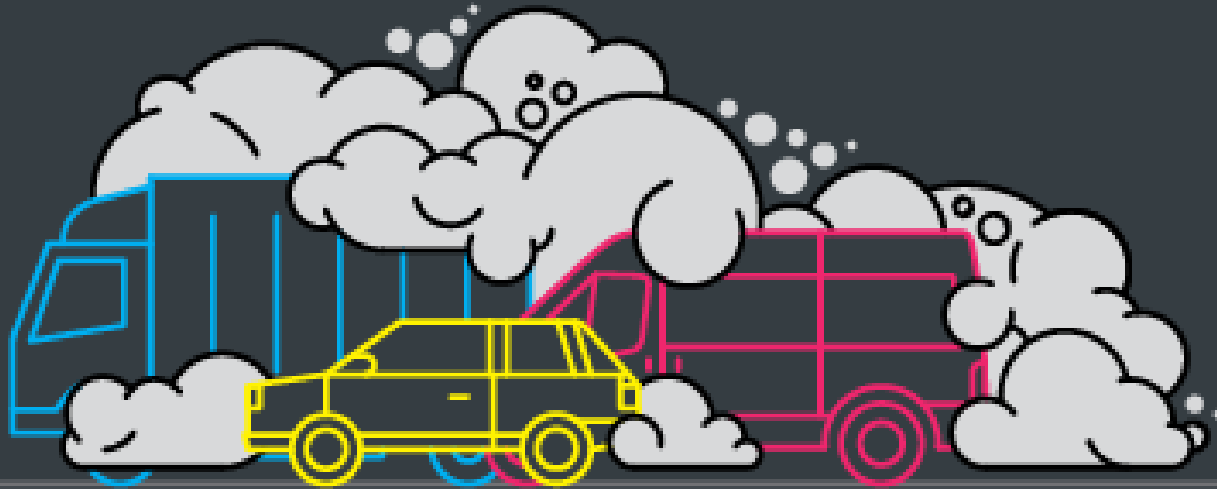


AIR QUALITY STAGE 1 CONSULTATION RESULTS



AIR QUALITY CONSULTATION PROCESS

On his election in 2016, the Mayor committed to a large scale consultation on a range of actions to address poor air quality in London. Measures under consideration include implementing the Ultra Low Emission Zone (ULEZ) in 2019 rather than 2020, expanding the boundaries of the ULEZ, introducing an Emissions Surcharge on the most polluting vehicles driving in central London from 2017. In addition the Mayor has committed to cleaning up London bus fleets, using air quality alerts, and exploring options for a diesel scrappage scheme.

To ensure Londoners have the opportunity to influence the policy-making process throughout, a multi-stage consultation process has been implemented, and is outlined below.

This report focuses on results from the Stage 1 consultation, which will inform Transport for London’s considerations on the Stage 2 and 3 consultations.

| Stage | 1 - Consultation and engagement on proposals , Summer 2016 | 2 – Statutory consultation on T-charge; policy consultation on ULEZ proposals, Autumn 2016 | 3 - Statutory consultations on bringing forward ULEZ and expanding the ULEZ zone |
|-----------------|--|---|--|
| Purpose | <ul style="list-style-type: none"> Raise awareness of the issues and challenges Call for evidence / an opportunity for Londoners to share experiences and perceptions about AQ and views on the proposed measures. | <ul style="list-style-type: none"> Statutory consultation on T-charge Detailed ULEZ policy proposals presented for the public and stakeholders to fully consider the options and to provide their views. | <ul style="list-style-type: none"> Statutory consultation on bringing forward ULEZ (Spring 2017) and expanding the ULEZ zone (Autumn 2017) |
| Delivery | <ul style="list-style-type: none"> Policy context and messaging to be hosted centrally on London.gov, with consultation delivered via Talk London (discussion and survey) with supporting content on TfL platforms. | <ul style="list-style-type: none"> Via TfL Consultation Portal. Stakeholder engagement - in particular high influence and high interest groups. | <ul style="list-style-type: none"> Via TfL Consultation Portal. Stakeholder engagement - in particular high influence and high interest groups. |
| Outreach | <ul style="list-style-type: none"> Co-ordinated communications activity on London.gov and TfL plus media. Use of TfL and GLA email databases, social media outreach, earned media coverage. Activity to complement TfL and GLA policy team’s ongoing engagement with stakeholder organisations/industry. | <ul style="list-style-type: none"> Re-engage participants in first wave to steer them towards detailed proposals. Co-ordinated communications activity on London.gov, TfL channels and Mayoral announcements. | <ul style="list-style-type: none"> Re-engage participants in first and second waves to steer them towards detailed proposals. Co-ordinated communications activity on London.gov, TfL channels and Mayoral announcements |

STAGE 1 METHODOLOGY

- **Talk London Clean Air Survey** - Total 16,122 participants, of which 14,289 completed responses, 1,822 partially completed the survey. Duplicate responses from the same registered email addresses were removed, as were responses that started the survey but answered no questions. Many questions were optional, so respondents were able to skip if they wished – the base sample numbers are given for each question where relevant. Fieldwork ran 5th-29th July 2016.
 - **TNS Clean Air Survey** – Identical questionnaire to Talk London survey. 1,000 sample, representative of the London population by age, gender, ethnicity, plus boosted sample of 650 Londoners in Inner London. Fieldwork ran 5th-29th July 2016.
 - **TNS T-Charge Poll** – A survey of 1,000 Londoners, representative of the London population by age, gender, ethnicity was commissioned to understand Londoners’ perceptions of a potential charge on the most polluting vehicles. Fieldwork ran 9th-14th June 2016.
 - **Talk London discussions** - Approx. 700 comments posted on discussion threads. Users have started over 60 of their own discussions. Summaries are given in later slides. These discussions were actively moderated through the AQ consultation period 5th-29th July 2016.
 - A number of Londoners responded to the consultation outside the survey and discussions on Talk London, for example by writing to/emailing TfL and the Mayor. These have been collated, read, included in qualitative analysis slides in this report and verbatim correspondence is available to view if required.
-

There are a number of differences between, and limitations to, the methodologies for both the Talk London and TNS surveys. Their results should be considered separately, with due consideration to the caveats noted here and throughout. It is important that the results are accurately reported and the correct source is cited in any publications.

- Respondents to the Talk London consultation are more likely to already be engaged with the issue of Air Quality than those polled by TNS Research. They voluntarily completed the survey and many were presented with information on the scale of air pollution in London - these factors, coupled with outreach by stakeholder organisations. For example, 66% of Talk respondents think pollution is a problem at their high street compared to 49% of TNS respondents.
- Results of the Talk London consultation are un-weighted by demographic group. This is to ensure that all responses to the consultation are considered equally. Respondents to the Talk London poll are more likely to be male, white, ABC1 (see respondent profile slides for more detail).
- The TNS poll has a core sample of 1000 18+ year olds, representative of the London population, by age, gender and ethnicity. The sample has been boosted by 650 responses in inner London with a view to reaching greater numbers of lower income Londoners and those in more polluted inner London boroughs.
- The TNS poll results show higher levels of ‘don’t know’ and ‘neither’ responses to the proposed measures, this is expected from a more randomized sample of non-engaged respondents, plus the fact that Talk London respondents were more likely to have been routed through contextual information on London.gov.uk.
- **Due to the unrepresentative nature of the Talk London sample, the TNS poll is used for comparisons between different demographic groups in this report, unless otherwise stated.**

KEY FINDINGS: GENERAL

- **The majority of Londoners think that air pollution is a problem in the capital, particularly in central London but also across the city in general.**
- Residents of the Congestion Charging Zone (CCZ) and those who live within the North South Circular Roads are more likely to perceive a problem with air cleanliness in their neighbourhood or local town centre, than those who live further out.
- Empirical data shows that inner Londoners are adversely affected by poor air quality in London, and our survey found that Inner Londoners were more likely than outer Londoners to think that air pollution was a problem.
- Using respondent postcodes to map responses shows that respondents who say their local high street or neighbourhood has a big/very big problem cluster around main roads and in central London.
- Particular hotspots appear to be Marylebone/Edgware Road/Euston Road, Farringdon, Whitechapel, Angel, Archway, Green Lanes, Peckham Road and West London along M4.
- ABC1 respondents were more likely to perceive there to be a problem with air pollution than C2DE respondents, and were also more likely to support the introduction of measures to improve the situation.
- Large numbers of Londoners attribute poor air quality to vehicles and congestion. There was little perceived difference between petrol or diesel engines. However, two-thirds of Londoners support a government-backed diesel scrappage scheme (66%).
- Given the public's attribution of pollution to vehicles, it is not surprising that support for pedestrianisation in central London was a popular measure – 65% support. Support for local high street/town centre pedestrianisation was less marked, but still exceeded opposition.

KEY FINDINGS: ULEZ

There is strong public support for expanding the proposed ULEZ boundary beyond the CCZ:

- 71% of Talk London respondents and 63% of TNS respondents think that the boundary for light vehicles should be wider than the currently proposed CCZ.
- Residents within the N/S circular roads are more likely to favour a wider boundary than those who live further out.
- Support for a boundary beyond the CCZ to the existing Londonwide LEZ is stronger still for heavy vehicles. This preference across the board for a Londonwide ULEZ for heavy vehicles reflects the high numbers of respondents who view lorries & vans as the top cause of air pollution.

Both polls show support for bringing forward the ULEZ scheme in central London to 2019:

- 62% of inner Londoners favour early implementation, compared to 48% of outer Londoners. This suggests stronger support in areas more affected by poor air quality.
- Interestingly, while two-thirds of Talk London respondents in the CCZ support the early introduction of the scheme, this rises to 87% among people who live between the CCZ and N/S circular boundary.
- In Talk London discussions, some respondents raise concerns that the ULEZ and Emissions Surcharge act as regressive taxes, and/or need to be accompanied by incentives for people to switch to clean vehicles.

KEY FINDINGS: EMISSIONS SURCHARGE

There is strong support for introducing an Emissions Surcharge for the most polluting vehicles. 81% of Talk London respondents and 62% of TNS respondents support an Emissions Surcharge (ES).

Importantly, more than half of respondents to the TNS T-Charge poll said that a ES would mean they would drive much less or slightly less regularly in central London than they do now. However, only 8% would consider changing their vehicle in order to avoid a charge.

- Support for an Emissions Surcharge is linked to ability to pay. More ABC1 respondents support the ES than C2DE Londoners.
- Inner Londoners and people who live in or near the potential ES zone are more likely to favour the scheme than outer Londoners, which may be a reflection of being more affected by poor air quality.
- There is strong support for the ES to apply to 9+ seater vehicles, likely due to these vehicles as making a significant contribution to pollution in the capital.

- **Respondents favour a £10 daily charge in greater numbers than any other option.** 67% of Talk London respondents think the charge should be £10 or more, compared to 43% of TNS respondents who agree, opposed to a similar proportion (40%) who think the charge should be lower (or no charge).
- 44% of TNS survey respondents think that residents should receive a 90% ES discount, compared to 23% who think they should pay in full. However, among Talk London respondents 49% think residents should be in full. This likely reflects the more engaged audience.
- While many participants in the discussion threads support measures to discourage polluting vehicles from driving in the CCZ, others express concern about the unfairness of a charge on those unable to pay or to upgrade their vehicles.

PERCEIVED LEVELS OF AIR QUALITY

74% of Londoners perceive air cleanliness to be a problem in central London, 67% think so in London as a whole. On a neighbourhood level, a substantial proportion of Londoners think the cleanliness of the air is a problem, but this figure is lower than with respect to central London.

Over a third of respondents picked a middle option when asked about their local high-street or neighbourhood. As no 'don't know' option was provided for this question, it is assumed that many respondents will have used the middle point of the scale to indicate uncertainty about the scale of air pollution in their neighbourhoods. This may indicate a need for more information to be provided to Londoners on this issue.

Talk London respondents are more likely to perceive a problem than TNS respondents. This is likely a product of the Talk sample being self-selecting and the contextual information on the scale of the issue provided on London.gov.uk, that TNS respondents did not see.

Demographic insight (from TNS poll)

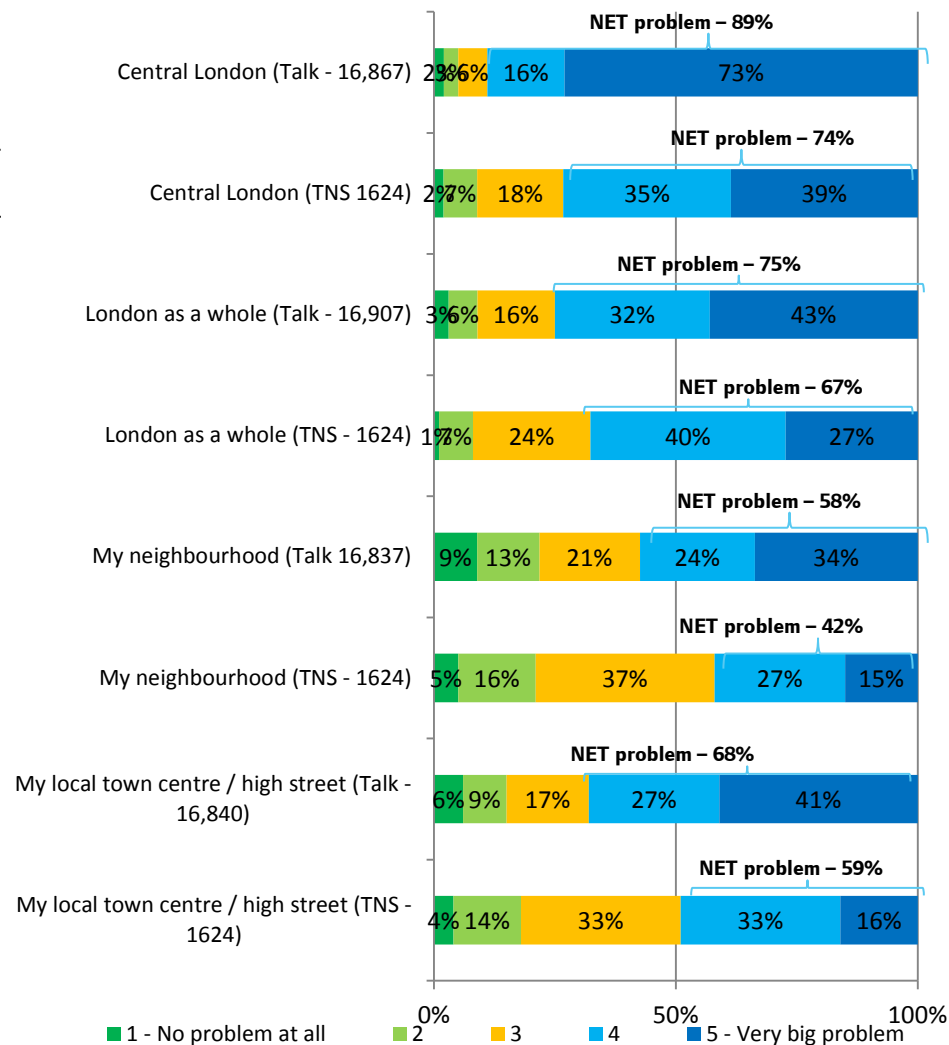
More likely to think AQ is a problem in **London as a whole:** women, ABC1, inner Londoners, those who rarely/never drive in CCZ

More likely to think AQ is a problem in **central London:** women (81% v 65% men), ABC1, private drivers more likely than commercial drivers

More likely to think AQ is a problem in **my local town centre/high st:** women, parents, ABC1, inner Londoners (55% v 38% of outsiders)

More likely to think AQ is a problem in **my neighbourhood:** parents, inner London (46% vs 34% of outer)

How much of a problem is the cleanliness of the air in...



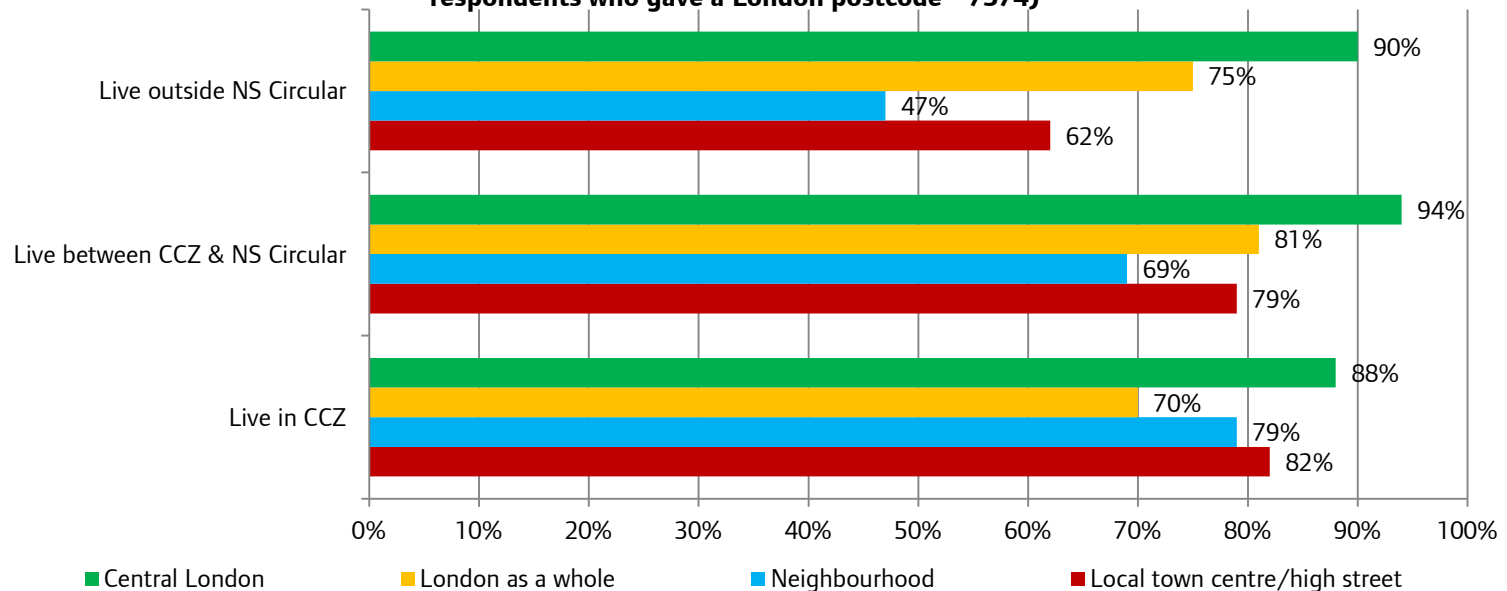
PERCEIVED LEVELS OF AIR QUALITY, BY HOME POSTCODE

Londoners who live within the N/S Circular and CCZ are more likely to perceive an air quality problem in their local town centre and neighbourhood.

Residents of the area between the CCZ and N/S Circular are pessimistic about air cleanliness in London and indeed their neighbourhood – they are more likely than those in other parts of the city to think that Central London and London as a whole has a problem. By contrast, Londoners living outside the N/S Circular are less likely to say that there is a problem with air pollution in their local neighbourhood.

All respondent groups perceive central London as having a problem with air pollution; there is no significant difference in opinion between those who live further out and those who live centrally. Many Londoners who live further out will commute into central London regularly, so are likely to be aware of air quality in central areas.

% of respondents who think pollution is a problem/big problem, by home postcode (base: Talk London respondents who gave a London postcode - 7574)



NB - Respondents who provided a non-London postcode, or no postcode are excluded from this analysis.

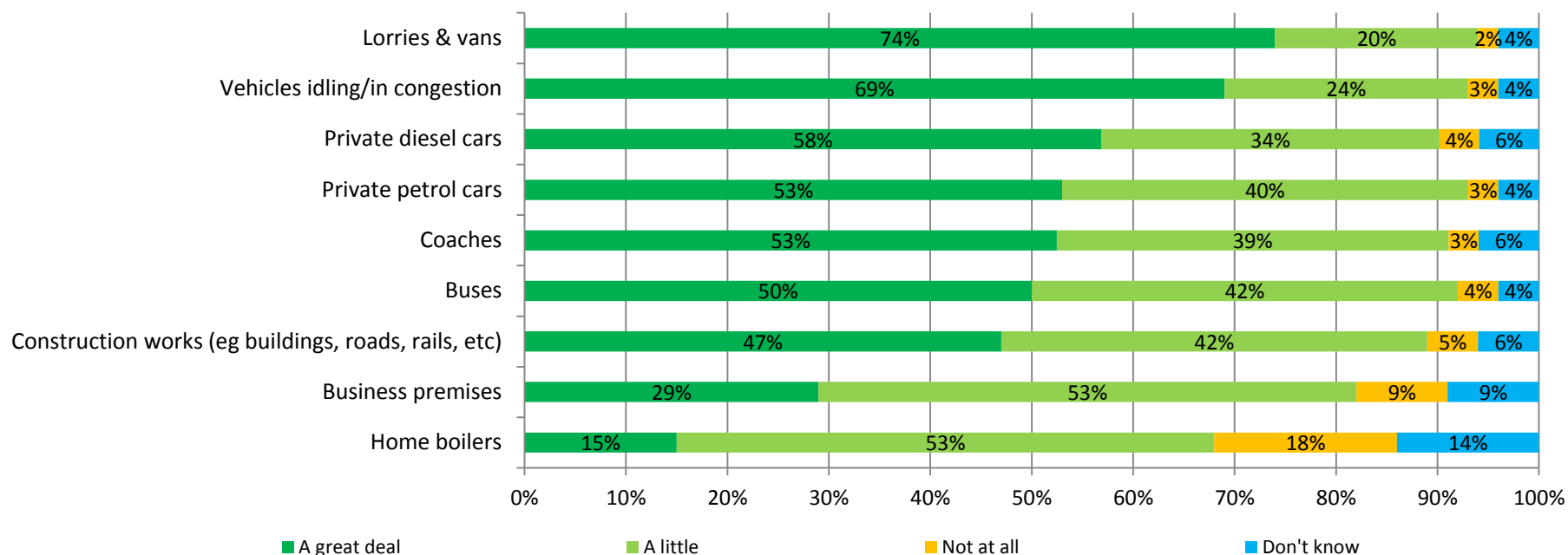
PERCEIVED CAUSES OF AIR POLLUTION

Large proportions of Londoners blame lorries & vans and congestion for air pollution, followed by private cars. Over half of Londoners say coaches and buses contribute a great deal to air pollution in London.

Feelings are particularly strong with respect to lorries & vans (nearly three-quarters say they are responsible 'a great deal'). There is very little difference in perceptions of the impact from diesel and petrol cars, suggesting that more can be done to communicate the different impact of each.

Fewer Londoners perceive home boilers or business premises as a major cause of air pollution.

To what extent do you think each of the following is responsible for air pollution in London? (base TNS 1650)



ULEZ EXPANSION FOR LIGHT VEHICLES FROM 2020

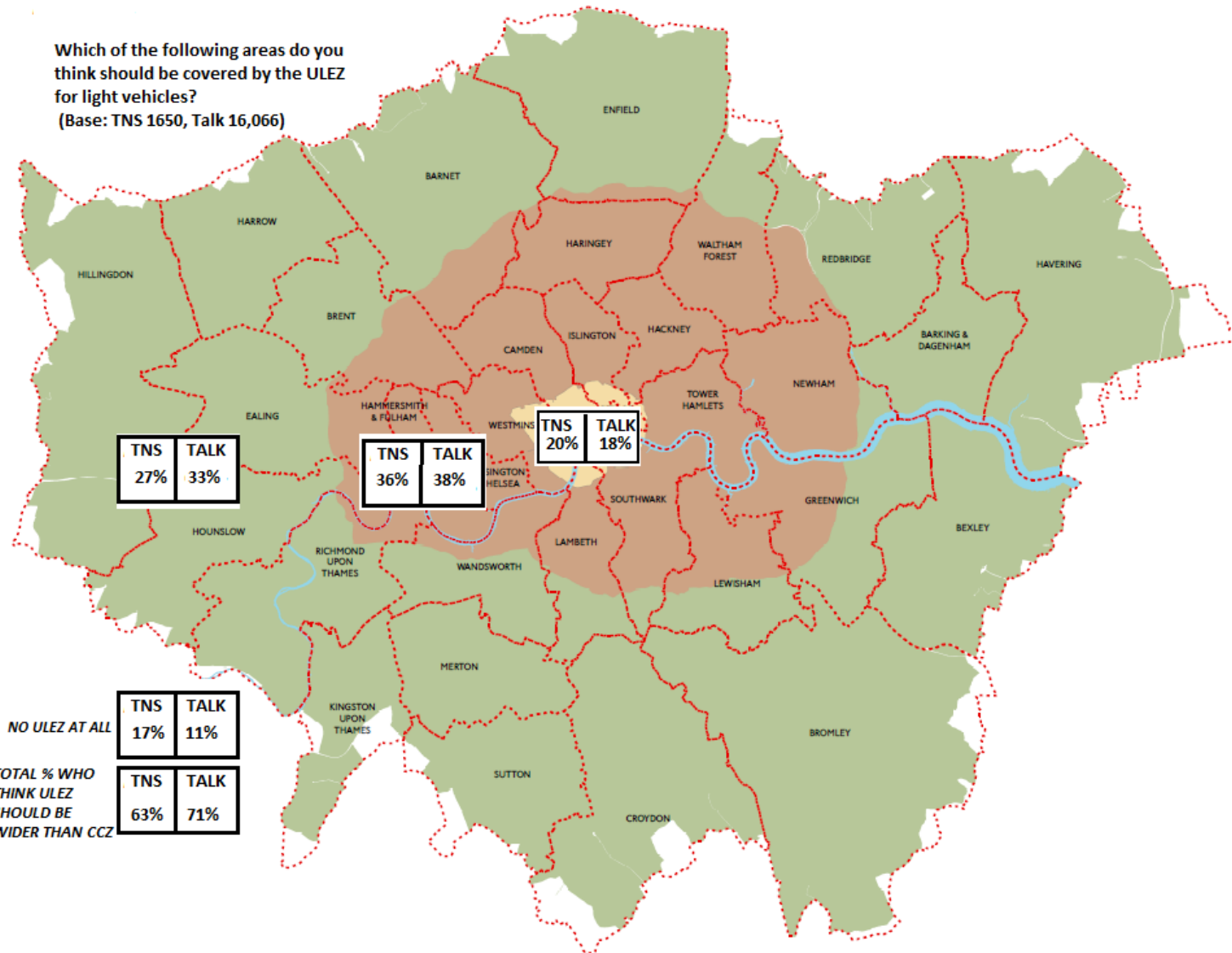
There is strong support for the ULEZ boundary to be wider than the current proposed yellow zone in both polls. 63% of TNS respondents and 71% of Talk respondents think the zone should extend at least to the N/S Circular Roads or further.

Demographic insight (from TNS poll)

Residents of inner London boroughs are most likely to favour the N/S Circular boundary (red zone). There are no other major demographic differences with respect to this zone.

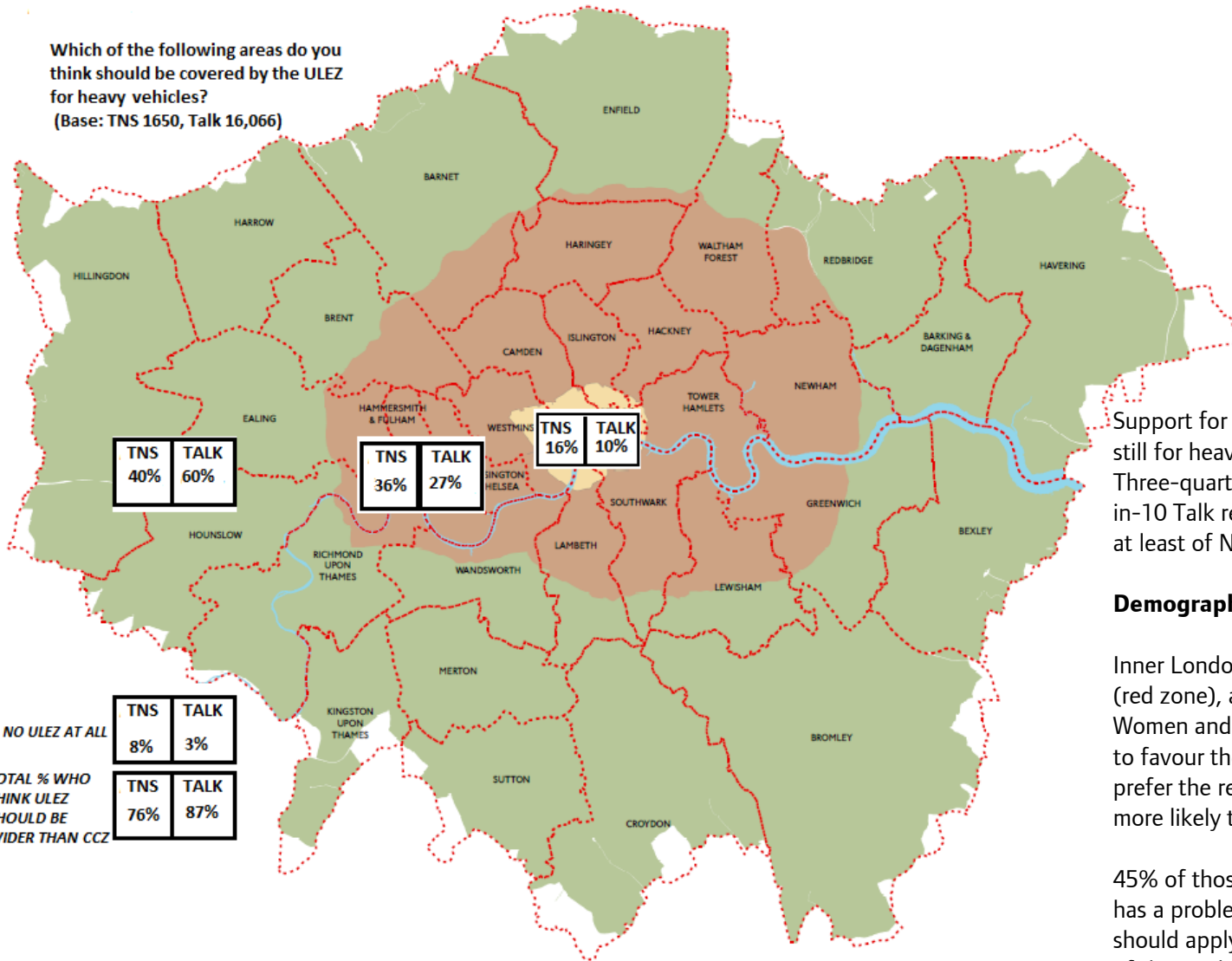
Those who think London as a whole has an AQ problem prefer the red or green boundaries over the smaller yellow zone.

Which of the following areas do you think should be covered by the ULEZ for light vehicles?
(Base: TNS 1650, Talk 16,066)



ULEZ EXPANSION FOR HEAVY VEHICLES FROM 2020

Which of the following areas do you think should be covered by the ULEZ for heavy vehicles?
(Base: TNS 1650, Talk 16,066)



Support for a boundary beyond the CCZ is stronger still for heavy vehicles than for light vehicles. Three-quarters of TNS respondents and almost 9-in-10 Talk respondents want a boundary extending at least of N/S Circular Road if not further.

Demographic insight (from TNS poll)

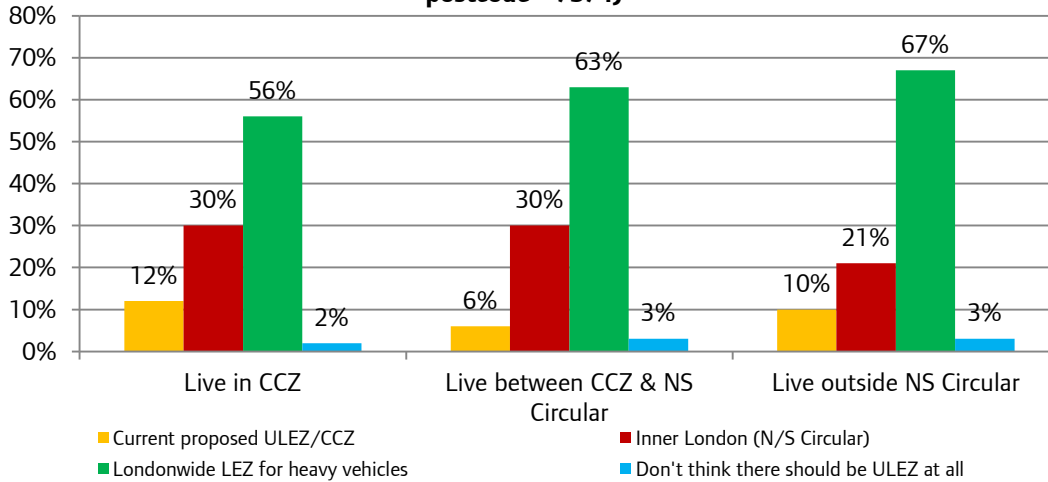
Inner Londoners prefer the N/S Circular boundary (red zone), as they do for the light vehicles. Women and those out of work appear more likely to favour the wider green zone. BAME Londoners prefer the red zone, while white Londoners are more likely to say the green area.

45% of those who think that London as a whole has a problem think the ULEZ for heavy vehicles should apply to the green zone, compared to 29% of those who don't think it's a problem.

ULEZ EXPANSION BY HOME POSTCODE

By analysing responses according to respondent postcode, we can understand differences in opinion with respect to ULEZ expansion according to whether respondents live within the CCZ, N/S Circular or wider London. This data is from the Talk London poll. Respondents who provided a non-London postcode, or no postcode are excluded from this analysis.

Which of the following areas do you think should be covered by the ULEZ for heavy vehicles? (base: Talk respondents who provided London postcode - 7574)



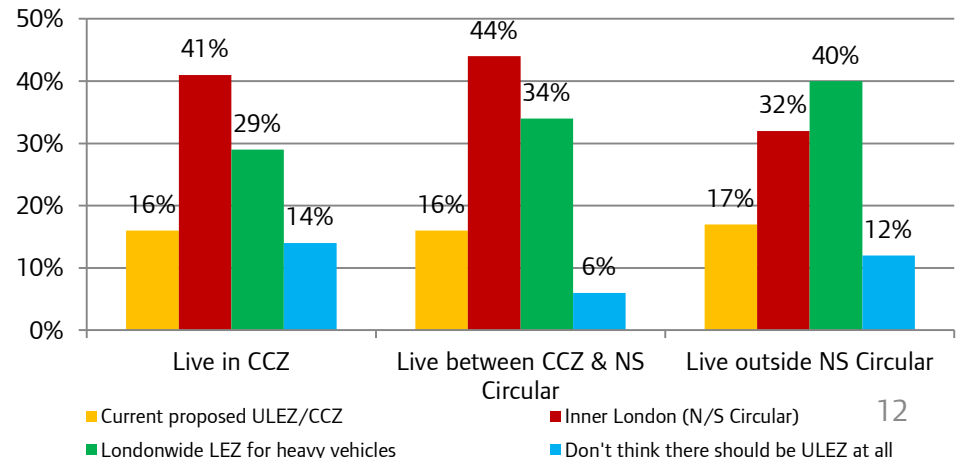
The existing Londonwide LEZ is by far the most popular boundary option for heavy vehicles, but especially among Londoners who live outside N/S Circular. Respondents from outside London (or who didn't leave a postcode) also favour a London-wide ULEZ for heavy vehicles. This preference across the board for a wide ULEZ for heavy vehicles reflects the high numbers of respondents who view lorries & vans as the top cause of air pollution.

Those who live within the N/S Circular are marginally more likely to say inner London as a boundary than those outside.

Londoners living outside the N/S Circular favour a London-wide ULEZ. By contrast inner London is the most popular boundary for those living within the N/S circulars.

Overall, it is clear that respondents favour the ULEZ extending as far as they live, perceiving its benefits in improved air quality to exceed the potential costs to them as drivers.

Which of the following areas do you think should be covered by the ULEZ for light vehicles? (base: Talk respondents who provided London postcode - 7574)



TALK DISCUSSION: EXPANDING ULEZ

Despite support illustrated by survey results, many commenters on Talk London express concern with ULEZ plans – those who support tend to propose possible alterations, such as not bringing ULEZ implementation forward and allowing time for adaptation, or extending it further, beyond the current ULEZ for HGVs. Many people express concern that implementing a ULEZ – and especially expanding it – will unfairly hit the poorest who cannot afford to upgrade their cars to avoid the charge, and outer Londoners, who drive as things are more dispersed and the transport infrastructure is poor in comparison to central London.

| Support | Opposition |
|---|---|
| ULEZ could be a good way of limiting pollution if done in tandem with other changes such as improved public transport, better car sharing schemes, or a diesel scrappage scheme | Concerns over ULEZ expansion being unequitable – unfairly hitting poorer people who cannot upgrade cars to those which are not chargeable |
| The ULEZ is the right step for limiting health impacts of poor air quality and should be expanded as far as possible | ULEZ expansion is unfair to those who drive a few miles in the area – even more problematic if expanded to N/S circular. |
| | Bringing forward ULEZ doesn't give people enough time to adapt to the requirements of the scheme |

“The Mayor has to look again at the daily flat charge idea because it penalises those people, who in the grand scheme of things, do not drive much in London at all. [...] the charge should be based on mileage done”

“Yes for the extension of the ULEZ. But it needs to be combined with a diesel scrappage scheme. [...] Keep all measures to reduce air pollution under review.”

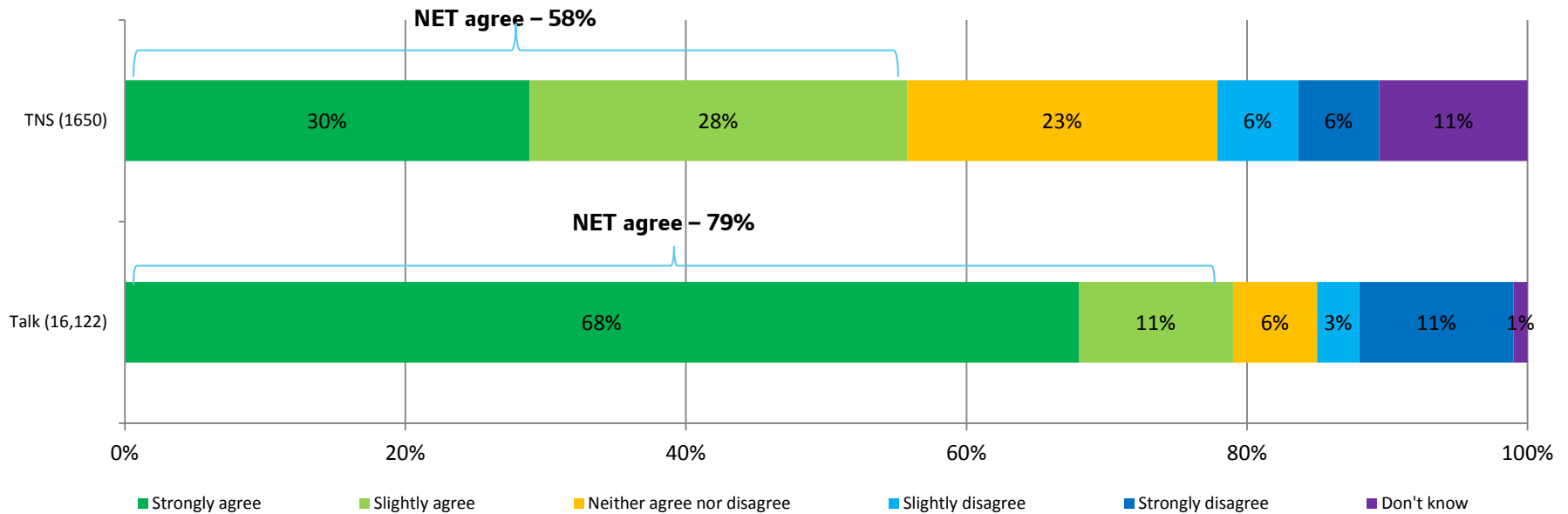
“I do not support this in any way. All it does is hit the many, including many poor [...] Talk of expanding the zone and bringing the implementation date forward is crazy. All it will do is hammer those who cannot afford to change vehicle and will therefore become another tax on the poor”

“Great idea, we need cleaner and safer environment in central London”

“I believe strongly that the ULEZ should be expanded to cover the entire current London-wide Low Emission Zone for heavy vehicles”

BRINGING FORWARD ULEZ TO 2019

Agree/disagree that ULEZ should be brought forward to 2019?



Both polls show support for bringing the implementation the ULEZ forward to 2019.

4-in-5 (79%) Talk London respondents agree with bringing forward, compared to 3-in-5 (58%) TNS respondents. Over two-thirds of Talk London respondents strongly agree.

Only 6% of Talk London respondents chose neither agree nor agree, compared to 23% of TNS respondents.

62% of Inner Londoners favour early implementation, compared to only 48% in outer Londoners. Outer Londoners are more likely to say neither or don't know. This suggests stronger support in areas more affected by poor air quality, and relative disinterest or ambivalence in areas which would not be affected by early implementation.

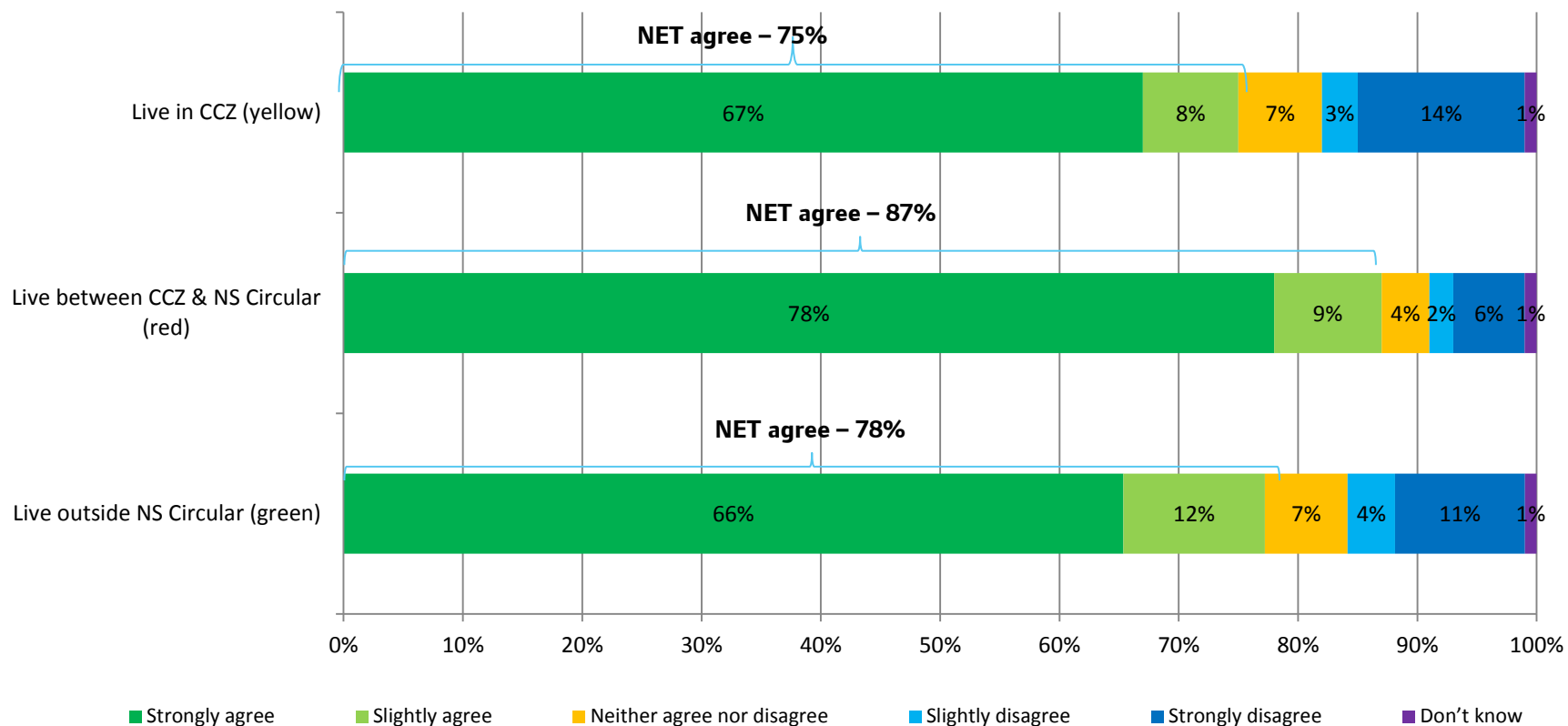
Men are more likely to agree with bringing forward than women, while ABC1s are more likely to agree than C2DE. BAME Londoners are less likely to agree with early implementation (54%, compared to 60% of white Londoners).

Two-thirds of those who think London as a whole has an AQ problem favour early implementation.

BRINGING FORWARD ULEZ TO 2019, BY HOME POSTCODE

75% of Talk London respondents who live within the CCZ/ULEZ favour early implementation in 2019. While this still represents a significant majority, Londoners who live outside this area but within the N/S Circular are even more likely to agree with early implementation.

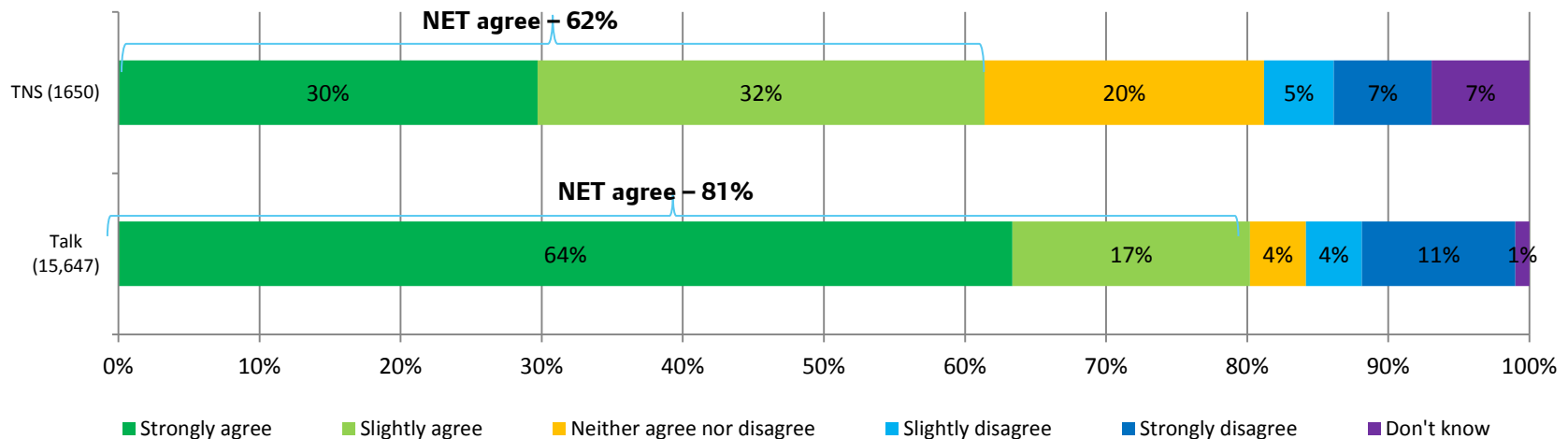
Agree/disagree with bringing ULEZ forward to 2019 (base: Talk respondents who provided London postcode - 7574)



NB - Respondents who provided a non-London postcode, or no postcode are excluded from this analysis.

EMISSIONS SURCHARGE

Agree/disagree with Emissions Surcharge



As with ULEZ early implementation, **both polls show strong support for the introduction of an emissions surcharge (ES)**, with Talk respondents being more likely to agree. The proportions match that for the ULEZ, with 3-in-5 TNS respondents and 4-in-5 Talk respondents agreeing with an ES.

Nearly two-thirds of Talk London respondents strongly agree with an ES. Less than 15% of respondents in either poll disagree with the introduction of an ES.

Demographic insight (from TNS poll)

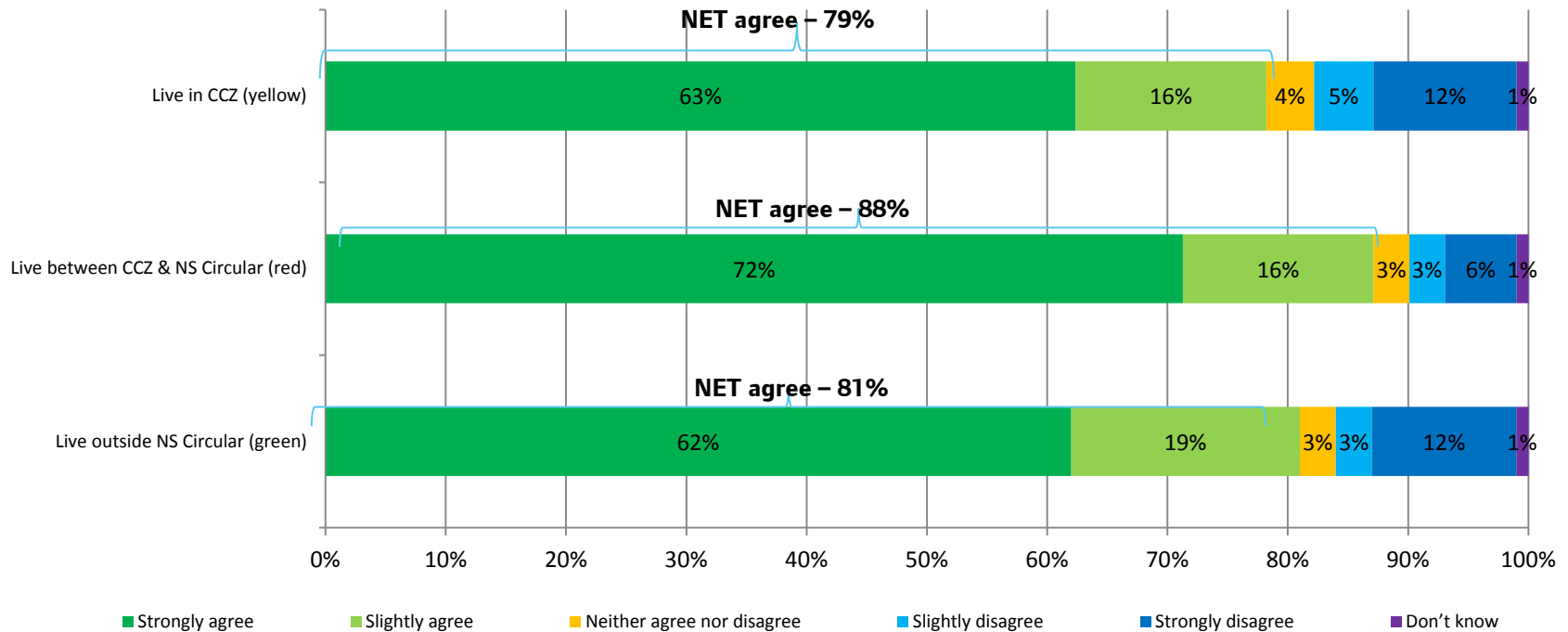
Views on the ES appear linked to ability to pay. ABC1 Londoners are more likely to agree with an Emissions Surcharge than C2DEs. Inner Londoners are more likely to agree than outer Londoners, meaning people who live in or near the potential ES zone are more likely to favour it.

64% of white Londoners favour an ES, compared to 57% of BAME Londoners. 69% of those who think London as a whole has a problem with air cleanliness agree, compared to 55% of those who don't.

Taxi drivers and PHV drivers appear to favour an Emissions Surcharge more than the general population (based on very small response numbers). This may be due to a range of factors, such as perceiving a benefit in terms of reduced congestion, or the fact that many such vehicles already meet the required standards or will do by implementation. Further research may be required to understand if this holds true with a bigger sample.

EMISSIONS SURCHARGE BY HOME POSTCODE

Agree/disagree with Emissions Surcharge (base: Talk London respondents who provided a London postcode: 7574)

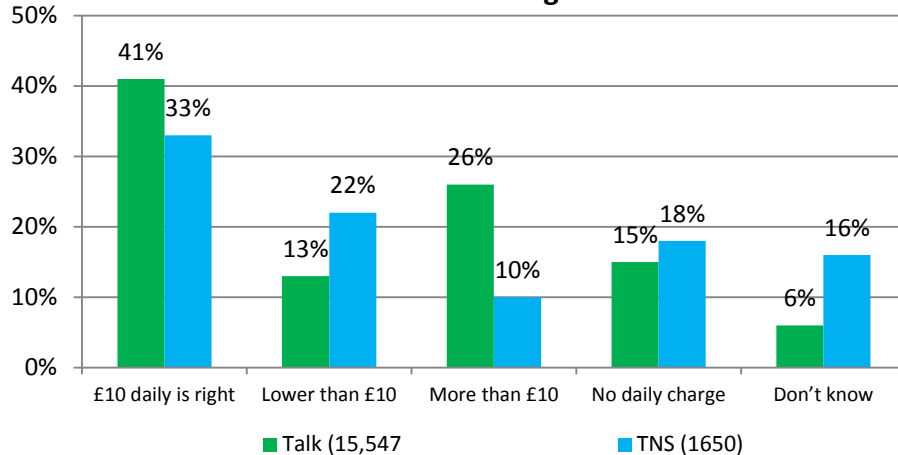


Londoners living outside CCZ but within N/S circular are most likely to agree with the introduction of an emissions surcharge. Although the ES wouldn't cover where they live, this may reflect the impact of poor air quality from vehicle pollution on trunk roads outside the core CCZ. Support is strong no matter where respondents live, but least pronounced among those who live in the CCZ

NB - Respondents who provided a non-London postcode, or no postcode are excluded from this analysis.

EMISSIONS SURCHARGE LEVEL

Level of charge



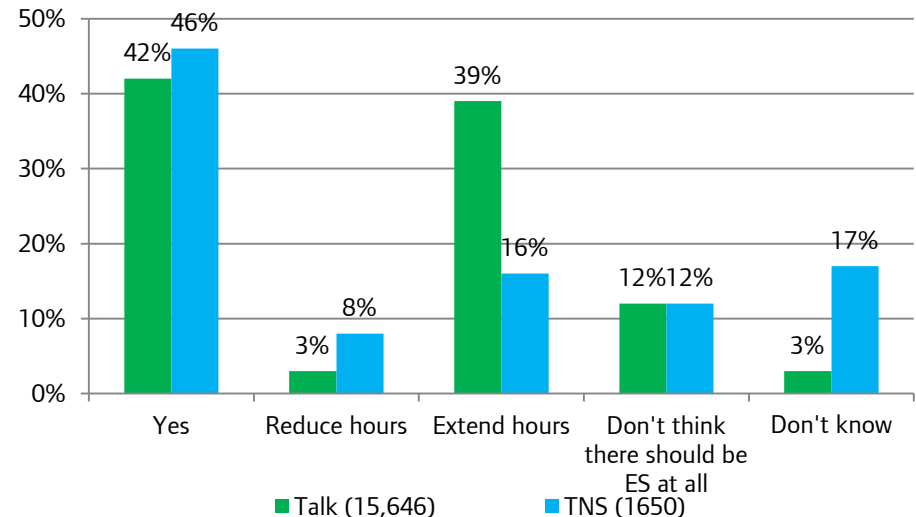
Respondents favour a £10 charge in greater numbers than any other option. Talk London respondents are more likely to say more than £10 than TNS respondents (26% v 10%). This may reflect the more engaged sample on Talk and outreach undertaken with stakeholder groups such as Greenpeace, Clean Air London, which may be expected to favour policy measures to address air quality.

Women and C2DE Londoners are most likely to not support a daily charge at all. Mortgage payers and social tenants also appear to share this view, or favour a lower charge.

There is strong support for the proposed ES operational hours of 7am-6pm Monday to Friday. Despite this, 39% of Talk respondents want to see extended hours, nearly as many as the 42% who favour the current proposed hours.

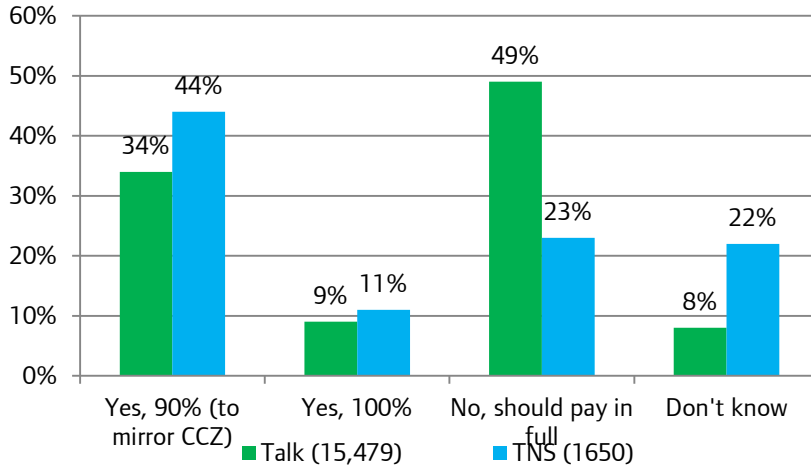
Men are more likely than women to favour the current hours. Parents appear more likely than non-parents to support the current hours, as do ABC1 Londoners compared to C2DEs.

Agree with operational hours for Emissions Surcharge?



EMISSIONS SURCHARGE FOR RESIDENTS

Should residents receive ES discount?



Despite the resident discounts for CCZ and ULEZ being highlighted, half of Talk respondents think central London residents should pay the full Emissions Surcharge. However, in the more representative TNS poll, the most popular option is a 90% discount (more respondents in the TNS said 'don't know'). Only 1-in-10 respondents think there should be a 100% discount for residents.

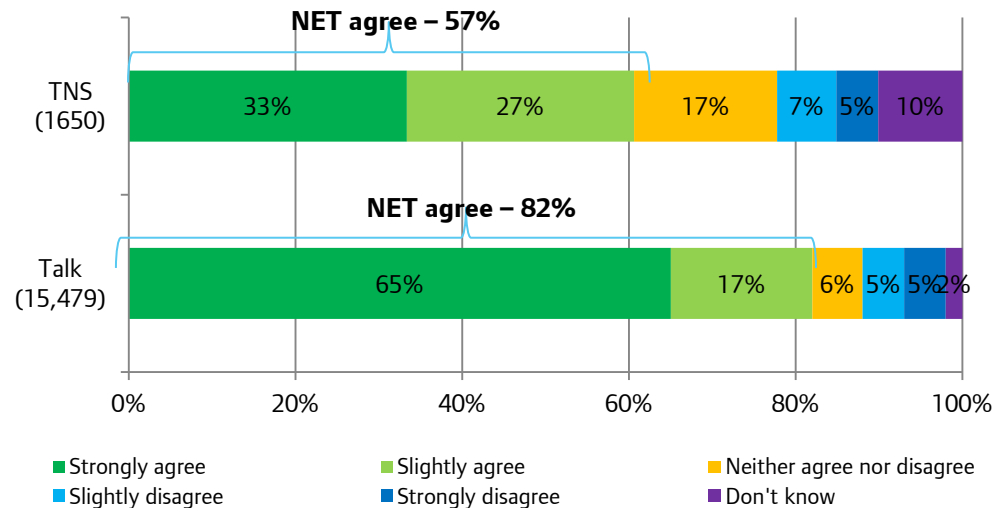
Again, views on the charge level appear linked to ability to pay.

Higher socio-economic groups appear more likely to favour a full charge for residents – ABC1s are more likely than C2DE Londoners. Homeowners are more likely than those in other types of housing. Those who drive in CCZ more regularly tend to favour a 90% discount. Inner Londoners are more likely than outer Londoners to favour a 90% discount (46% compared to 40% in TNS poll).

There is strong agreement in both polls that 9+ seater vehicles such as buses and coaches should pay the Emissions Surcharge. This follows from over half of respondents' view that coaches and bus contribute a great deal to air pollution in London.

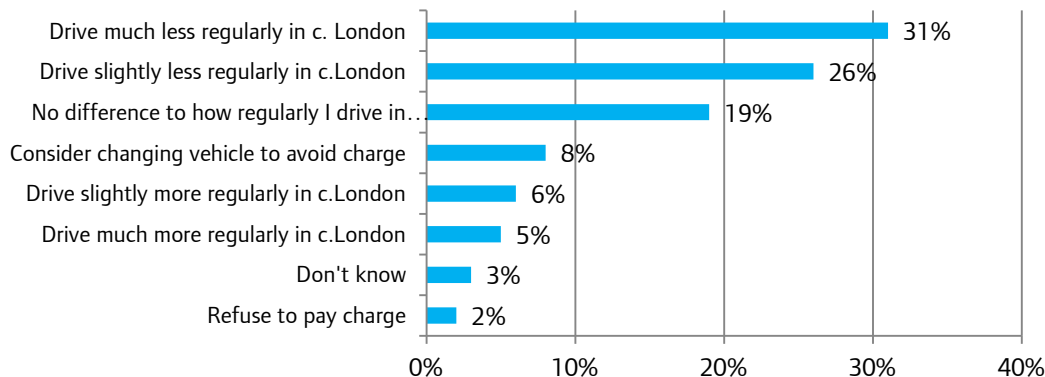
ABC1 Londoners, white Londoners and Inner Londoners are more likely to agree that 9+ seater vehicles should pay the Emissions Surcharge.

Agree/disagree that 9+ seated vehicles should pay?



EMISSIONS SURCHARGE BEHAVIOUR CHANGE

If your vehicle was subject to an additional charge due to the level of its emissions, how might that change how you driver your vehicle in central London? (base 1005)



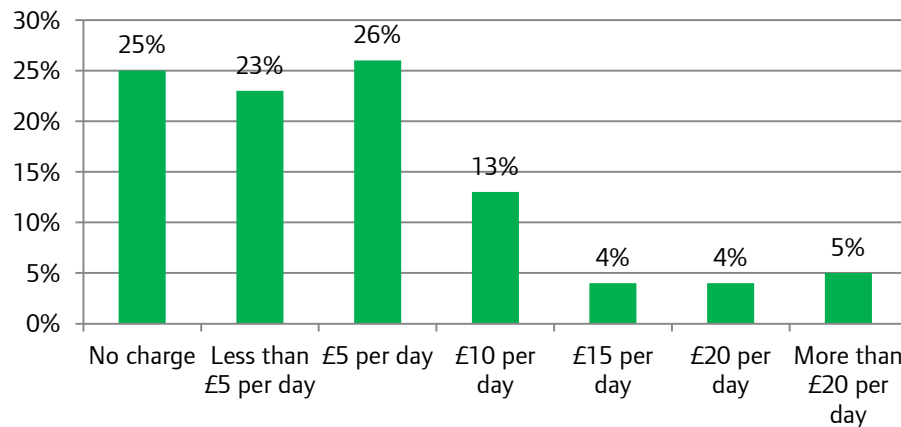
Prior to the start of the consultation, a survey of 1000 Londoners was commissioned (delivered by TNS between 9th & 14th June) to gauge early views on the introduction of the Emissions Surcharge, level of charge and willingness to change behaviours.

57% said that a charge would mean they drive much less or slightly less regularly in central London. 8% would consider changing vehicle to avoid a charge. Only 2% say they would refuse to pay.

As with the other surveys, fewer respondents think the Emissions Surcharge should be more than £10 per day. Lower charge rates are more popular here than in the main consultation, but this may be the result of no contextual information on the scale and causes of the air quality problem being provided in this poll.

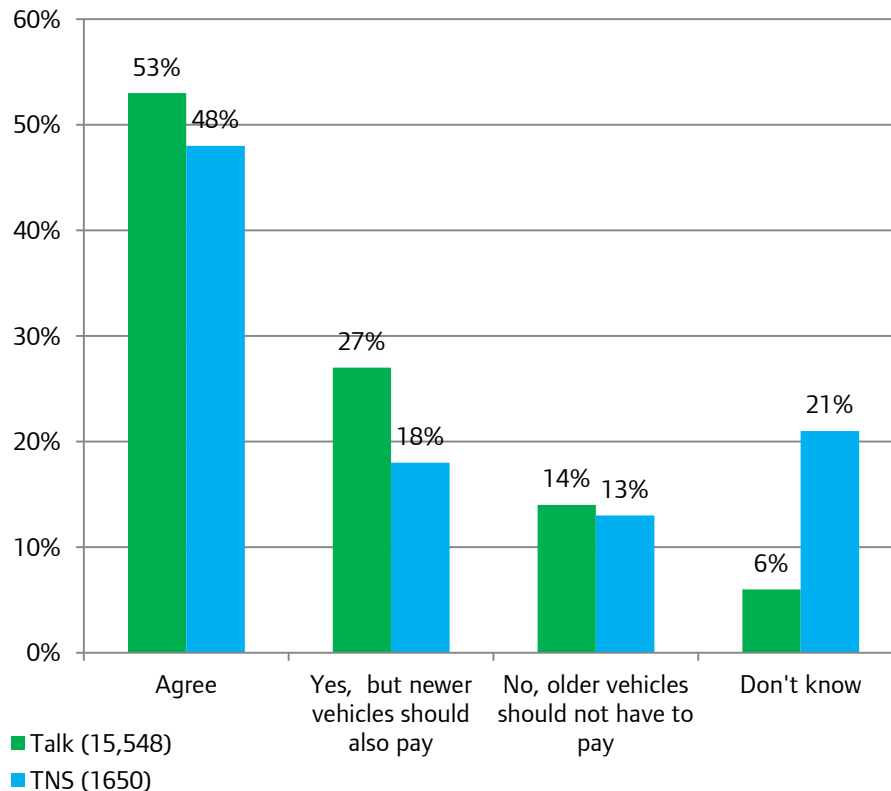
25% of respondents think there should be no charge, compared to 18% in the main TNS poll and 15% in the Talk London poll. Perceptions are tied to ability to pay. C2DE respondents are more likely to say this than ABC1s, and those out of work are more likely to say so than those in work.

If a charge was introduced, what level do you think would be most appropriate? (base 1005)



EMISSIONS SURCHARGE: EURO 4

Agree/disagree that the vehicles that don't meet at least Euro 4 should pay ES?



In both polls, around half of respondents to both polls agree that vehicles that do not meet the Euro 4 standard should pay an Emissions Surcharge. In the Talk London poll, a further 27% think that the ES should apply to newer vehicles too.

Less than 15% of respondents to either poll think that older vehicles shouldn't have to pay at all.

Again, there appears to be a link between views on who should pay and ability to pay, with wealthier respondents preferring higher or more charging.

More likely to agree that vehicles not meeting Euro 4 should pay:

Men, Employed, Parents, ABC1, Inner Londoners, white Londoners

More likely to think that newer vehicles should also pay:

Private renters compared to mortgage payers (may be less likely to be car owners?).

TALK DISCUSSION: EMISSIONS SURCHARGE

While many participants in this discussion are supportive of discouraging polluting vehicles from driving in central London, others express **concern around the unfairness of a charge on poorer Londoners who can't afford to upgrade their vehicles to avoid the charge**. This is despite the Talk London membership including those from higher educated/higher socio-economic groups in greater numbers than in London's population as a whole. Respondents are skeptical about the benefits of electric cars, especially given their environmental production cost and the conversion from fossil fuel to electricity.

Similarly to the ULEZ discussion, few commenters felt that the charge, as is currently proposed is the right thing to implement – many offered amendments around what they think would improve the equity or environmental impact of the scheme.

| Support | Opposition |
|--|---|
| The charge is a good idea, but money should be ring-fenced for air quality improvement schemes | Perceived problems with electric vehicles – availability, production resource use, electric power use |
| The charge is a good idea, but it needs to be applied to private hire vehicles | Charges to all vehicles are seen to be unfair and raises issues around equity of the charge |
| The charge is a good idea, but it should be progressive rather than a flat rate | Charges seen to give people the 'right' to pollute as long as they can pay for it |

"Where will the money that's made from this go? How much will it reduce the pollution in the area? [...] Can City Hall say that it will spend money made from this scheme on improving air quality in London alone and not going into the budget for other things?"

"The oldest and worst polluters are often cabs – which are exempt from this – so what's the point?"

"Charges should be aimed squarely at vehicles that are most damaging to health, and plainly this is diesel engines"

"These latest proposals are attempts to foist unfair stealth taxation upon the vast majority, thus making the rich/poor divide worse"

"If you just make a charge, it's only saying to people that they can pollute if they pay the tax for it – it's not saying do not pollute the air"

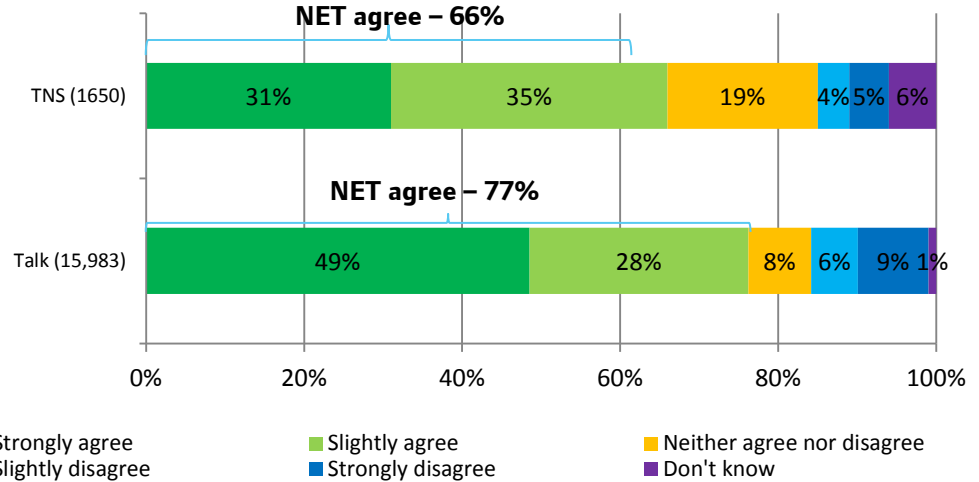
"Electric vehicles still cause pollution – think about how the electricity is generate. Add to that the toxic materials required to make them and how to dispose of them once they're uneconomical to repair"

SCRAPPAGE SCHEMES

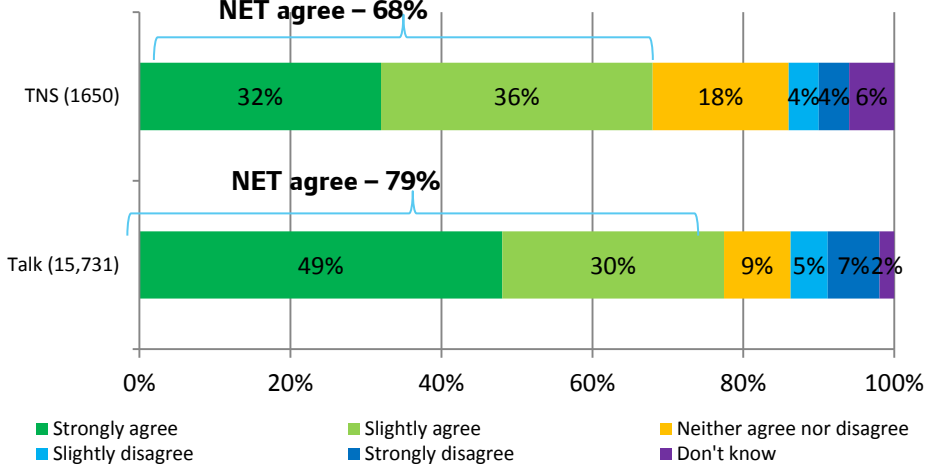
There is strong agreement in both polls (over two-thirds of respondents) that the Government should fund a diesel scrappage scheme. Again, support is stronger among Talk London respondents.

Agreement is strongest among women, parents and inner Londoners. Levels of support are similar between ABC1 and C2DE Londoners suggesting the limited impact of wealth on this issue. Those who think London has a problem with air pollution are more likely to agree. Diesel drivers are no more likely to agree than drivers of other fuelled vehicles. 78% of commercial drivers favour a scheme, compared to 67% of private drivers.

Agree/disagree that govt should fund a scrappage scheme (diesel)



Agree/disagree that Mayor should fund boiler scrappage



There is strong support in both polls for a boiler scrappage scheme, with the proportions similar to the diesel scrappage question.

Women, parents and inner Londoners are all more likely to think that the Mayor should fund a boiler scrappage scheme. Three-quarters of private renters think so, more than any other type of housing tenure.

As with many other interventions, support appears correlated with a perception that London has a problem with air pollution. Londoners who live between outside the CCZ are more likely than those who live within it to agree.

TALK DISCUSSION: DIESEL SCRAPPAGE

Improving car clubs was looked upon as the most positive incentive to switch away from diesel cars or private cars generally – there were very few criticisms or concerns around this. More concern was expressed around the cost of a new electric vehicle (upwards of £15000) against the relatively nominal sum that would come from a scrappage scheme. Scrapping cars is also seen as environmentally wasteful and to be avoided by a large number of participants.

| Encourage | Discourage |
|--|---|
| Incentivising a switch to cleaner/electric vehicles is good but improved charging infrastructure is required | Emissions testing should be done to identify cars to be scrapped rather than general encouragement |
| Helping to finance car replacements is a good idea, but it shouldn't just be for new cars, but for second hand cars that meet regulation | Has the potential to be regressive, and excludes those who cant afford to switch regardless of incentive or scrappage schemes |
| Car clubs are a good option, but they need to be altered to serve long, and out of town journeys, as well as short city trips. | The energy used in electric vehicles generated by fossil fuels may be worse in total than the fossil fuelled car |
| | High environmental cost of scrapping functioning vehicles |

“Rather than forcing people to buy new vehicles, the "scrappage" scheme should focus on helping fund modifications to make older vehicles compliant with the higher Euro standards”

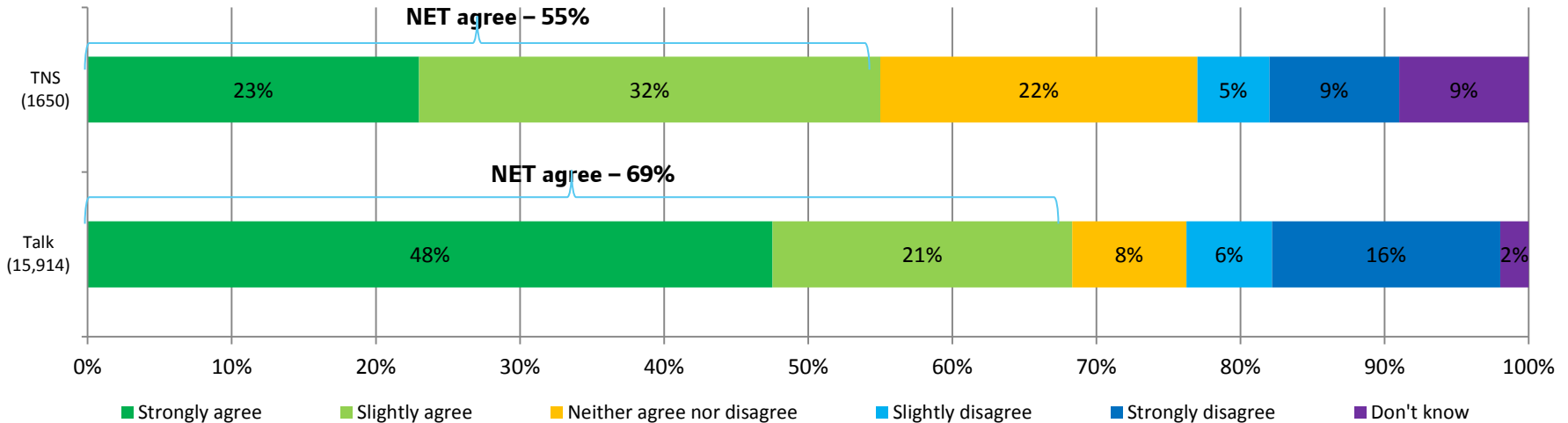
“My son doesn't own a car - he lives in Hackney. Whenever he has had to move house or needs to transport something, he uses a Zip van, which he thinks is brilliant”

“[my car] has a new engine and is dual-fuel. I run on LPG all the time and it's as near zero pollution as you can be. I'm really worried that I might be forced to scrap it with this proposed legislation.”

“Car clubs could well be the way to go - would reduce vehicles on the road and cut that link between driving and ownership. [...] on the plus side the maintenance, upkeep, taxation and MOT would all be taken care of by someone else”

VEHICLE EXCISE DUTY

Agree/disagree that London should be given greater control over Vehicle Excise Duty



Both polls show support for London being given greater control over Vehicle Excise Duty. Nearly 7-in-10 Talk London respondents favour this, with almost half strongly agreeing.

As with many other measures in this consultation, the more representative TNS sample shows a higher proportion of ‘neither’ and ‘don’t know’ responses than the more polarised Talk London sample.

Demographic insight (from TNS poll)

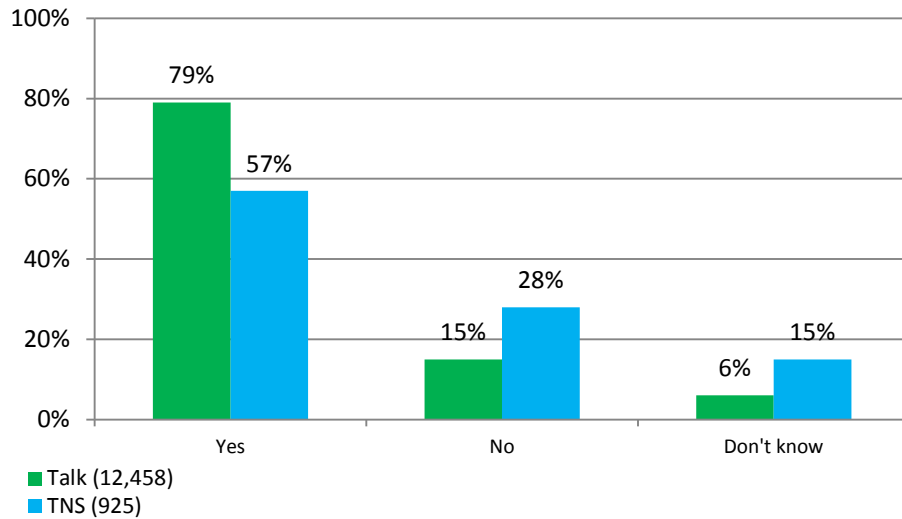
Parents are more likely than non-parents to favour London being given greater control over VED.

ABC1 Londoners are more likely than C2DE Londoners to think so. Inner Londoners (60%) are far more likely than Outer Londoners to think so (46%). Again, those who think London as a whole has a problem with air pollution are more likely to agree than those who don’t.

Though based on small sample sizes, PHV and cab drivers appear more likely to agree than individuals. Further weight to this conclusion is added by higher levels of agreement among commercial drivers compared to private drivers (64% v 49%)

AIR ALERTS

Would you like to receive information when air pollution is high?



Both polls indicated a willingness to receive information when air pollution is high. This question also included the subclause 'in order to take action that would protect your health'.

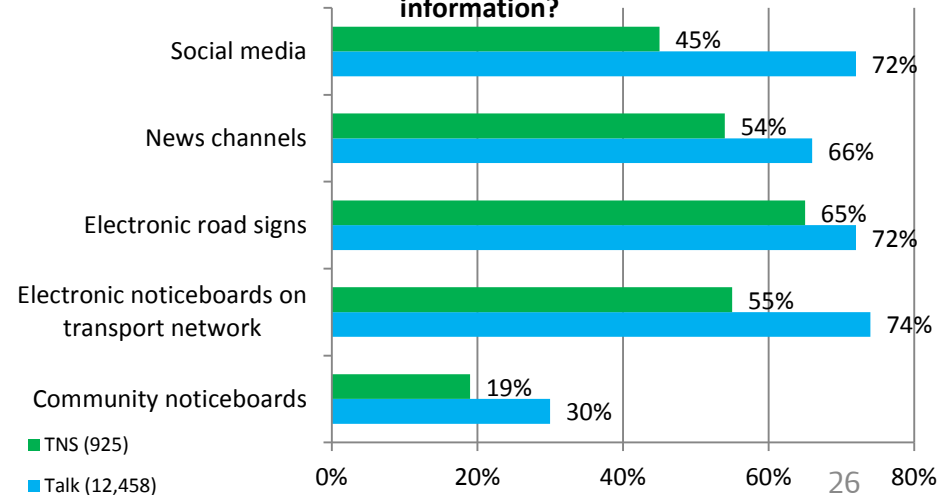
Women, parents and inner Londoners are all more likely to say yes. Renters are more likely to say yes than mortgage payers. There are no differences by ethnicity. Those with higher levels of education are more likely to say yes, as are those who think London has an air quality problem.

Men are more likely than women to say electronic road signs or noticeboards on the transport network.

Working Londoners are more likely than non-working Londoners to say social media. Non-working Londoners and parents are more likely to say news channels.

ABC1 Londoners are more likely than C2DEs to say notices on the transport network which may reflect their commuting habits. They also favour social media in greater numbers.

In which of the following ways would prefer to receive information?



TALK DISCUSSION: ALERTS

Most commenters supported high-pollution measures – particularly better access to information, and it appeared that people wanted the information everywhere – texts, email, TfL network, screens, online and in weather forecasting on the radio and TV. It was generally felt that knowledge would encourage people to change their behaviour. Free public transport on especially high pollution days was also thought to potentially have a strong impact. There was some concern that this dealt with effects of pollution more than trying to deal with the pollution problem itself.

| Support | Opposition |
|--|--|
| Knowing about pollution levels would have an impact on decision making when travelling around London | Money spent on adaptation rather than mitigation |
| For this to be most effective it should be part of usual weather forecasts | Unsure of whether this would change behaviour |

“Giving people as much information as is available about the daily air quality, and making judgments on emergency measures as in Paris would be a great idea”

“I’d be particularly keen to see strict restrictions on the use of private cars and ideally also HGVs on high pollution days, with free transport provided”

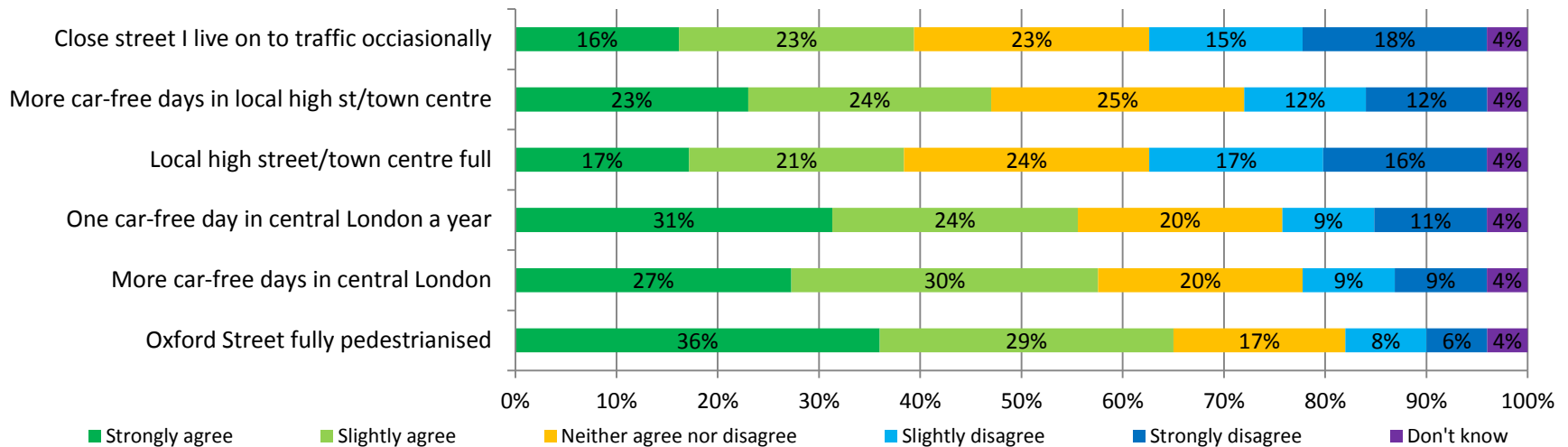
“I think this risks being a displacement activity where we spend money on helping people get around a problem rather than tackling the problem”

“I’d like to see evidence from Paris or elsewhere that providing such information does actually change behaviour - it looks a bit like a cones hotline to me. And I’d like to see what we would get if we put the money that this scheme would cost into actually reducing pollution instead.”

Yes - all of those [text, email, online etc.], plus added to weather forecasts on radio, TV & in newspapers. Once the pollution levels are adequately publicized, just wait for the clamour for the Mayor and/or central government to DO something to reduce those levels.

PEDESTRIANISATION

To what extent do you agree or disagree with the following (base TNS 1650)



Full pedestrianisation of Oxford Street is highly popular, with 65% of TNS respondents agreeing with this, adding to previous polling results that indicate the same thing (eg 68% agree in Talk London Talking Points Poll May 2016, 78% agree in Talk London AQ Poll).

Similar levels of support are seen for more car-free days in central London, and/or one car-free day a year. Pedestrianisation of local high streets or town centres, or neighbourhood streets is less popular, but levels of agreement still exceed levels of disagreement. Around a quarter of respondents express no opinion.

Pedestrianisation is also an active discussion on Talk London (see qualitative slides).

Demographic insight (from TNS poll)

More likely to favour Oxford St pedestrianisation:

While there is support across all groups, parents, ABC1 Londoners, white Londoners, inner Londoners are especially likely to support. Strong correlation among those who think that London as a whole. Cyclists also favour Oxford St pedestrianisation more than other transport mode users, including walkers. Regular CCZ users favour Ox St pedestrianisation more.

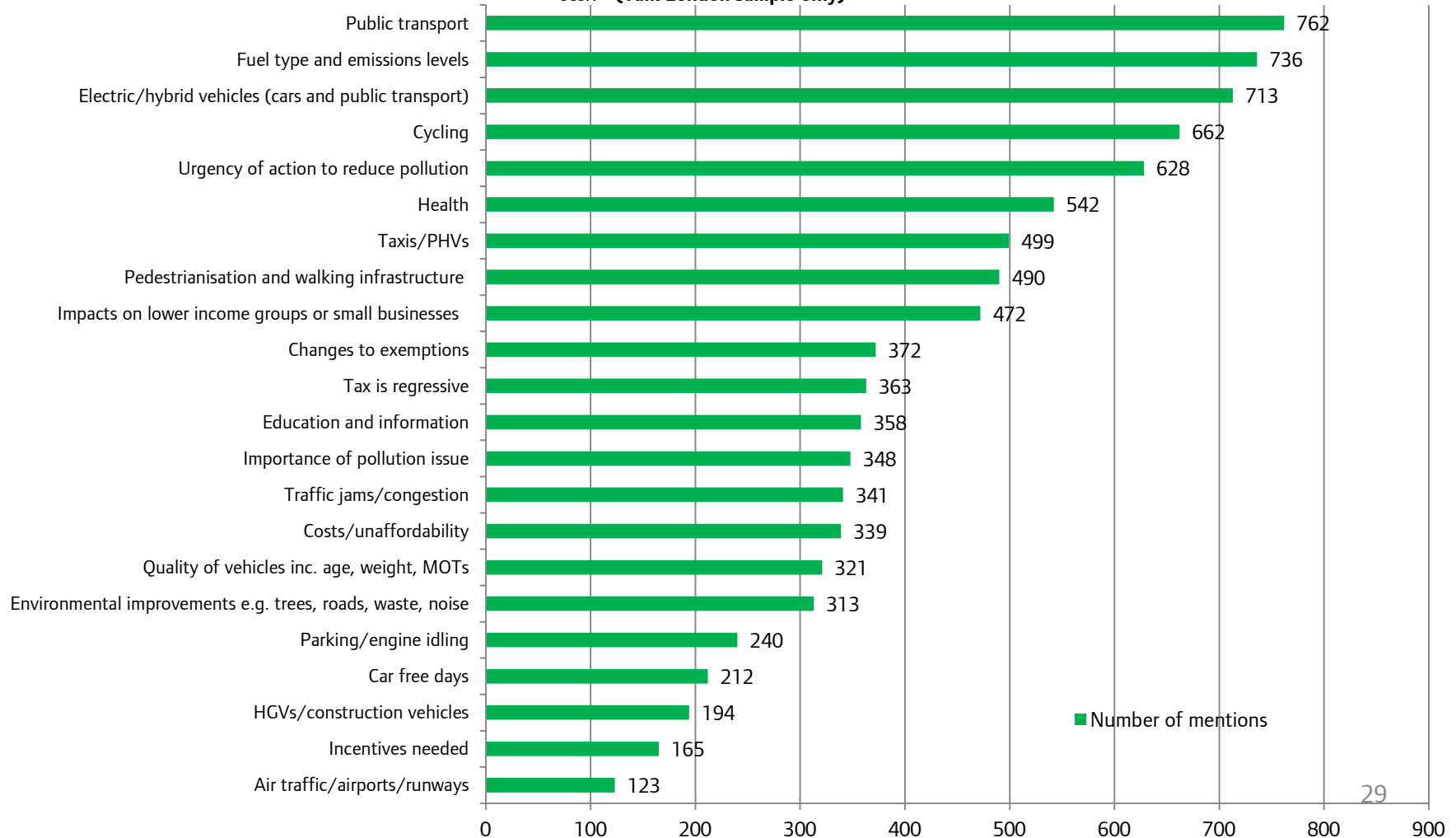
Most of the same differences are also apparent with respect to **occasional car-free days in central London**.

ADDITIONAL COMMENTS

Respondents were asked to provide any other comments about air pollution.

The most commonly mentioned issues by Talk London respondents related to public transport, cycling and fuel types/electric vehicles. The impact of air traffic was less commonly mentioned (the issue was not mentioned in the survey at all). Many respondents mention cycling, specifically questioning why it was not included in the survey, indicating that Londoners view this issue as part of the air quality problem and solution. A selection of verbatim comments are included below and the next slide.

Do you have any other comments on the measures mentioned in the questions you have just answered about air pollution, scrappage etc.?" (Talk London sample only)



ADDITIONAL COMMENTS CONTINUED

“Do you have any other comments on the measures mentioned in the questions you have just answered about air pollution, scrappage etc.?” (Talk London sample only)

Even very new, high spec cars are often seen spewing out choking black smoke!
More emphasis on diesels please!

“You should tax all aspects of vehicle usage including buses more than currently.”

“there needs to be more extensive and safer cycling routes provided for commuters”

“Major investment needed into creating green cycle routes that are also safe for children to cycle to eliminate motorised school runs”

“I would like to see more initiatives to support reduced emissions, like subsidies for Electric or hybrid fuel vehicles”

“There are far too many buses in London, they are causing the majority of the pollution. They are also very expensive for TfL to run”

“Any new policies which limit or charge for the use of vehicles must go hand in hand with investment in affordable and reliable public transport”

“Have lots of EV charging car parking available in outer areas encouraging people to use public transport for remainder of journey”

“Enable the purchase of ELECTRIC or at least hybrid cars as a matter of utmost urgency”

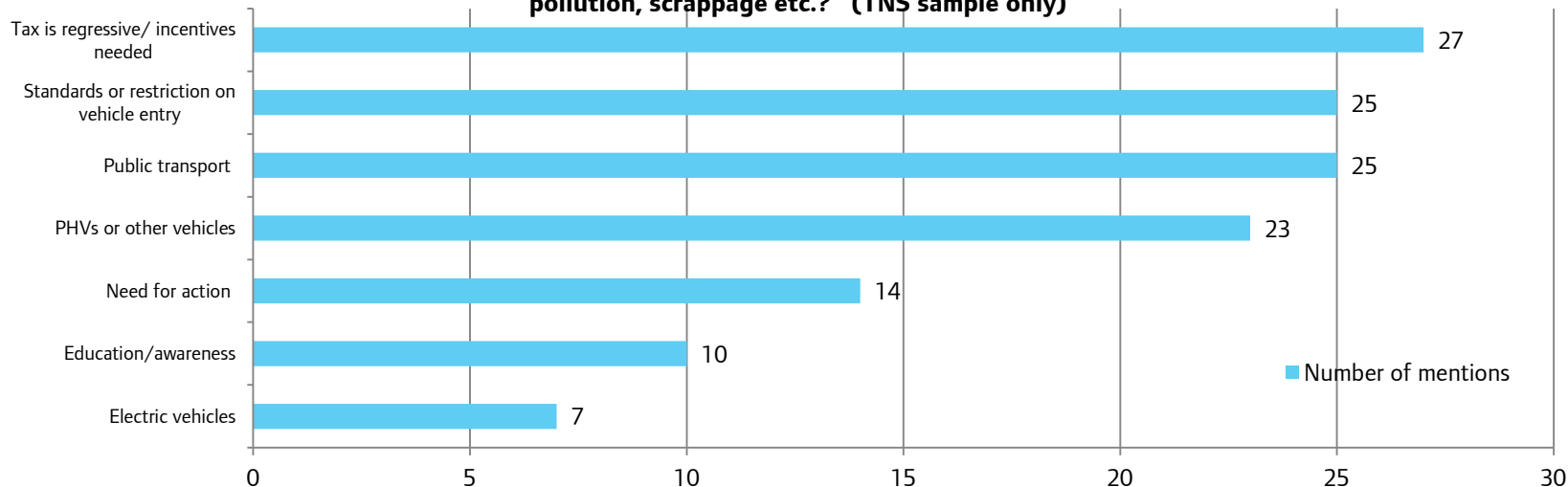
“The issue is too serious to implement half measures. Paris and Milan have already started the process of banning diesels in their town centres.”

“Subsidies needed to encourage people into environmentally friendly cars”

ADDITIONAL COMMENTS CONTINUED

TNS poll respondents are more likely to highlight the regressive nature of an Emissions Surcharge/ULEZ than Talk survey respondents. Buses, PHVs and vehicles other than cars are also mentioned regularly.

Do you have any other comments on the measures mentioned in the questions you have just answered about air pollution, scrappage etc.?" (TNS sample only)



"if buses and lorry were made to have frequent tests on emissions would stop a lot of it"

"Vehicles that do not meet the emission criteria once introduced should only be allowed the charge for a year after that they should not be allowed to drive in the ULEZ"

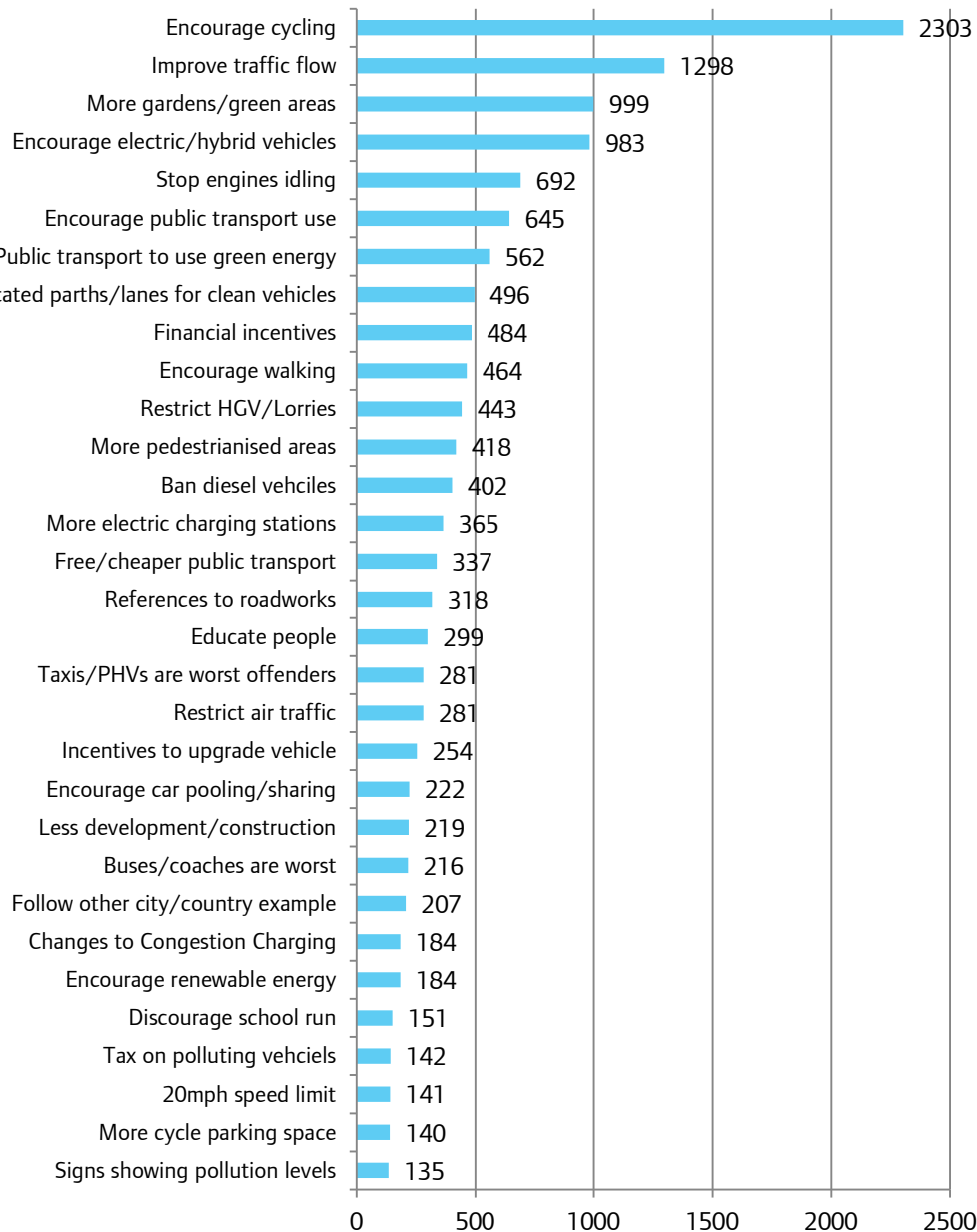
"poor people like myself cannot afford congestion charges nor to buy any new car & am reliant on my old car to get shopping"

"the charge should encourage people to use public transport, having abandoned their personal means of transportation. Using public transport reduces the amount of personal vehicles on the road"

"The charges suggested will impoverish drivers the most with old vehicles, owning old vehicles because they can't afford new ones. Bringing more charges will just be a punishment to them and make the poorer"

"If you introduce an extra levy on fuel, it will make UK-based vehicles less competitive. A surcharge on entering London is fairer. There should be monitoring of individual vehicles "

LONDONERS IDEAS



New ideas put forward by survey respondents were broad. Many responses echoed those in Talk discussions, or repeated and/or developed the ideas and options earlier in the survey.

The chart opposite covers issues mentioned by Talk respondents and the number of times they were mentioned, with cycling and traffic interventions being most popular.

Commonly mentioned new ideas:

- green infrastructure such as living walls, more trees or increased planting
- improving the quality of roads
- Slower speed limits, or penalties for engine idling.
- developing the canals for transport or freight
- expanding the tramways.

Many responses developed ideas already in the survey or practiced by City Hall:

- a city run car hire/car club scheme
- improving awareness or education via a mobile app
- improving cycling through expanding the cycle hire scheme to serve more parts of London.

“build more green spaces in the city. Plant more trees”

“stop people paving over gardens and filling back gardens with decking”

“Look at traffic flow, signalling, light phasing and the loss of London road space which has caused serious congestion”

“Encourage people to turn off engines when waiting at level crossings.”

“Car clubs like Drive Now are excellent for making low emission vehicles widely available. Please support them to roll out across London”

USER GENERATED TALK DISCUSSIONS: AN OVERVIEW

- There were 82 user generated discussions on Talk London in total. However, the majority of these received no further comments, or were not directly related to the consultation topics.
- New threads covered ULEZ, the emissions surcharge and diesel vs. cleaner vehicles and pollution measures, all of which were covered in Talk generated discussions
- Two user-generated discussions – congestion from cycling and pollution from minicabs – had lengthy and lively debate, outlined in the next two slides.
- Other discussions included references largely to ideas or solutions that users felt had been omitted from the survey. These included:
 - **traffic light phasing** to ease congestion
 - increasing **urban greening, water doping** in diesel vehicles to enhance engine efficiency,
 - concern around **diesel from trains and heavy rail**
 - concern around **engine idling**
 - problems with **pollution in flyover zones** and air traffic.

“My family have lived directly under the Westway flyover for over 20 years. During this time there has been an increase in the amount and type of transport using it ... the gung that enters our home has increased beyond measure”

“Little or no attention seems to be paid to a much worse source of air and noise pollution right in the middle of a highly populated residential area in SW London, namely the London Heliport.”

“I'd like to see more trees planted on my road.. it's practically bare”

“Marylebone is now London's only all diesel station... and still it has freight locomotives not turning off their polluting engines when not in use.”

“There are times where I have to stop at EVERY signal because the phasing is so poor”

“Why is it [engine idling fine] not publicised and acted on by Traffic Wardens and police? We only need a few prosecutions to make people aware”

TALK DISCUSSION: CONGESTION FROM CYCLE LANES (USER-GENERATED)

There was a lot of conflicting opinion in this discussion. Around half of commenters felt that the short term pollution impacts from the congestion caused by cycle lane investment was a big problem, whilst others saw that cycle lanes would encourage many others to take up cycling, and cut car use generally, limiting pollution in the long run.

| Agree | Disagree |
|---|---|
| Cycle lanes have increased pollution due to the slow moving traffic their construction causes | Cycle lanes are only a small proportion of the London road network |
| There's been a lack of transparent, accessible consultation around the development of the SCHs | Cycle lanes can make cycling safer which could encourage more people to switch from car to bike |
| It was wrong to start building cycle lanes in central London – they should have emerged first in outer London, and then been developed in | Increasing cycling is the only option for reducing vehicle gridlock and preventing health problems from pollution |
| The cycle lanes are causing problems across London, and are worsened by non-phased traffic lights | Not building cycle lanes won't ease congestion – focus to be on reducing private vehicle use |

"The cycle track has caused so much pollution due to traffic crawling at a snail's pace"

"London would be a pleasanter place if more people cycled [...] Bikes are a legitimate part of the traffic with virtually no space allocated to them"

"Restrict certain roads to bikes, buses and cabs during rush hour, but let traffic flow as normal outside these hours"

"In the centre of London more and more people are choosing to travel by cycle. And more and more people would cycle if they felt it were safer to do so"

"The new SCHs are wonderful. They are well used during rush hours [...] these protected bike paths will gradually tempt a lot of people onto bikes"

"Pollution could be reduced by simply phasing lights and scrapping the [...] un-phasing of traffic lights and the time lengthening between light change directions"

TALK DISCUSSION: CONGESTION & MINICABS (USER-GENERATED)

Most participants agreed that taxis and PHVs were likely to contribute significantly to poor air quality in London and some regulation was needed around this, but it was disputed as to what this regulation should be. Whilst some agreed their exemption should be removed, others thought this charge would be passed on to the consumer. The latter were more likely to advocate caps on the number of PHVs rather than charge exemptions. There was also concern around PHV and cab engine idling, and possible interventions around this.

| Support | Opposition |
|---|---|
| A cap is needed to deal with the number of PHV on the road which cause congestion and pollution – even if the PHVs are hybrid | Removing exemptions will shift the tax on to passengers |
| Pollution from PHVs could also be limited by ticketing when cars are parked with engines running | Limiting PHVs is problematic as it's the only option for many people to earn a living |
| | There should be incentives for PHVs to switch to more efficient vehicles, rather than aiming for a revenue raising solution |

“All black cabs, and in fact all taxis in general on London's roads should be running hybrid or electric engines, the technology had been there a long time, its just common sense”

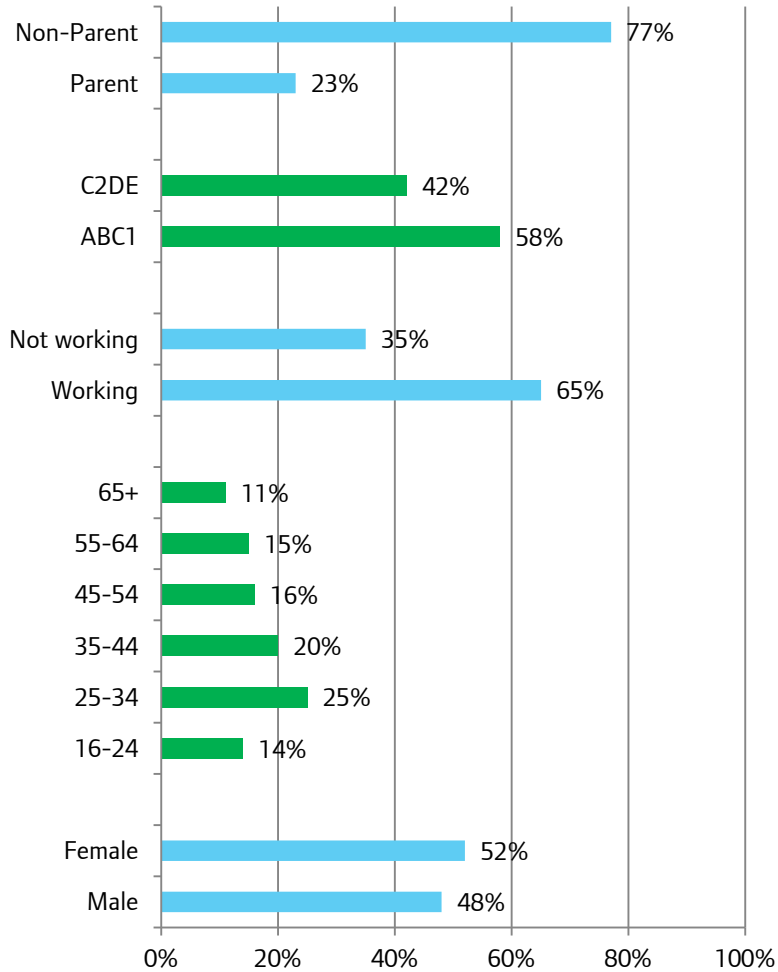
“Charging the minicabs a congestion charge would mean they would increase the fare, which in turn would not benefit for Londoners or customers”

“Black cabs have a defined life span now, so older taxis are being phased out, a large percentage are now euro4 and euro5 engines giving a lot less pollution, also there is control over the numbers of black taxis, approx 23,000, the number of PHV's is a lot more than 100,00”

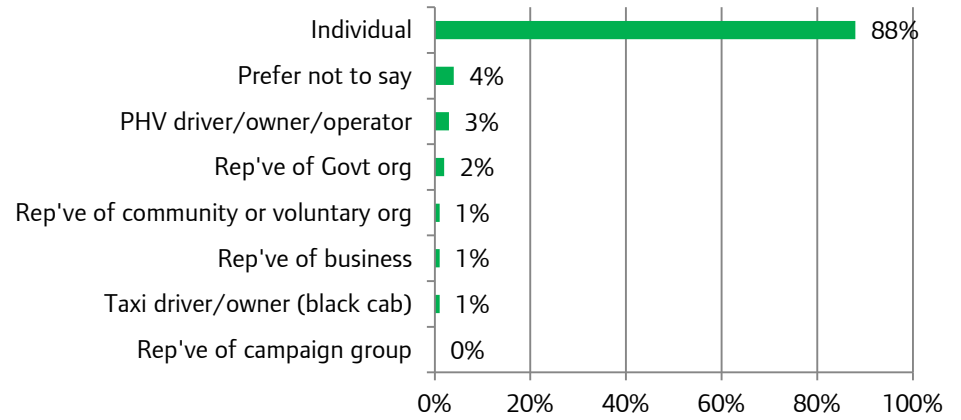
“I strongly disagree with the proposed exemptions for taxis and mini-cabs. These vehicles account for a significant share of the traffic on London's roads and, moreover, any given vehicle spends a proportionately large amount of time on the road. I therefore think it's important that material steps are taken to ensure these vehicles contribute as little as possible to pollution in the capital.

APPENDIX

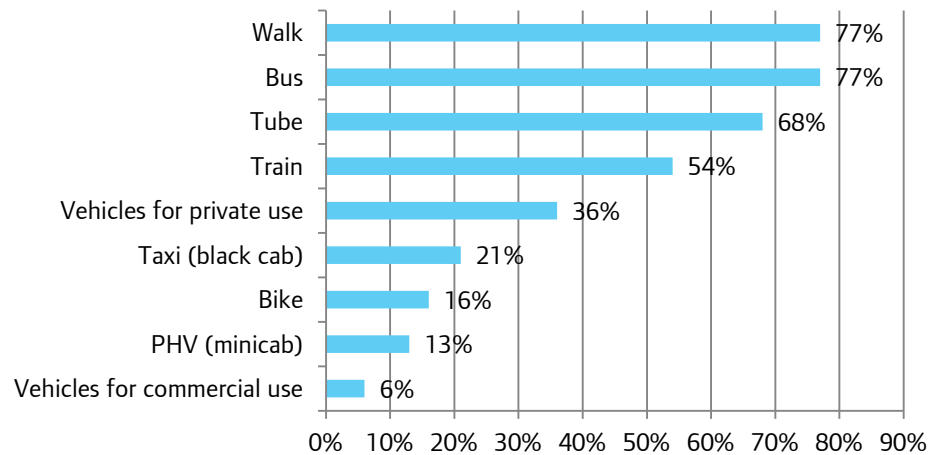
RESPONDENT PROFILE (TNS Survey)



In what capacity are you responding to this consultation?



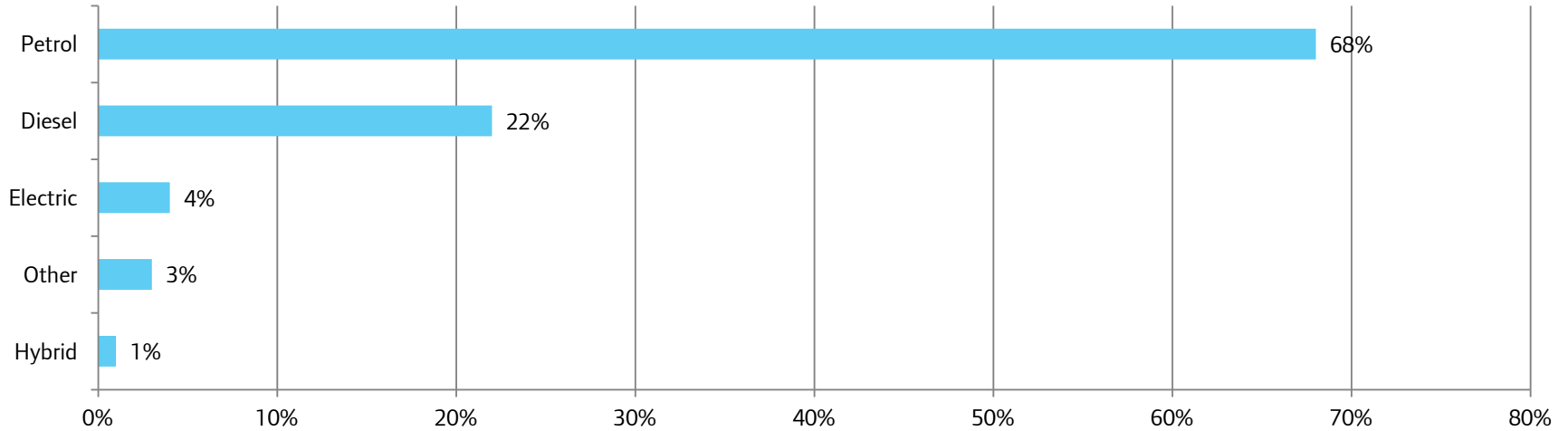
What types of transport do you use in London? (tick all that apply)



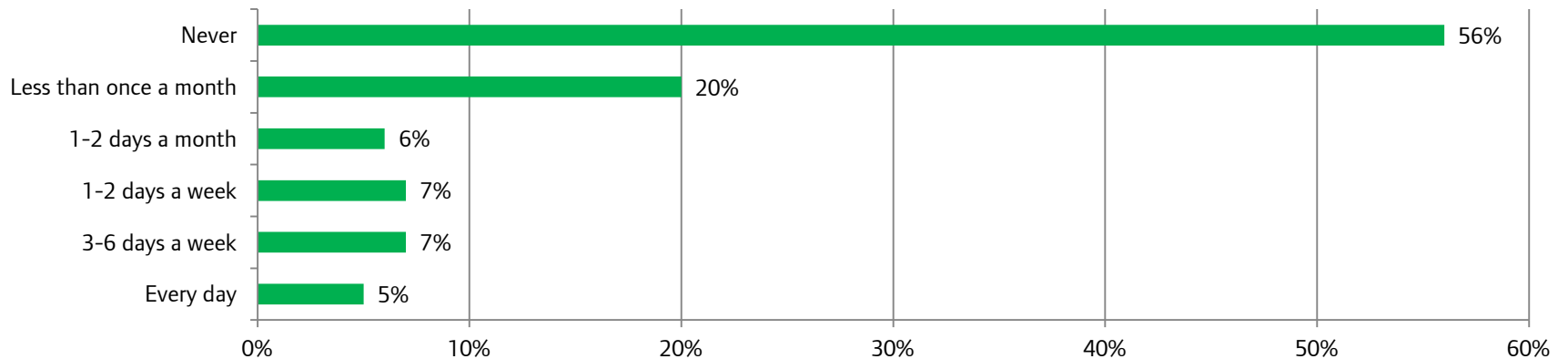
APPENDIX

RESPONDENT PROFILE (TNS Survey cont'd)

Among 'vehicles for private use' users only. What type of vehicle do you use? (base 590)

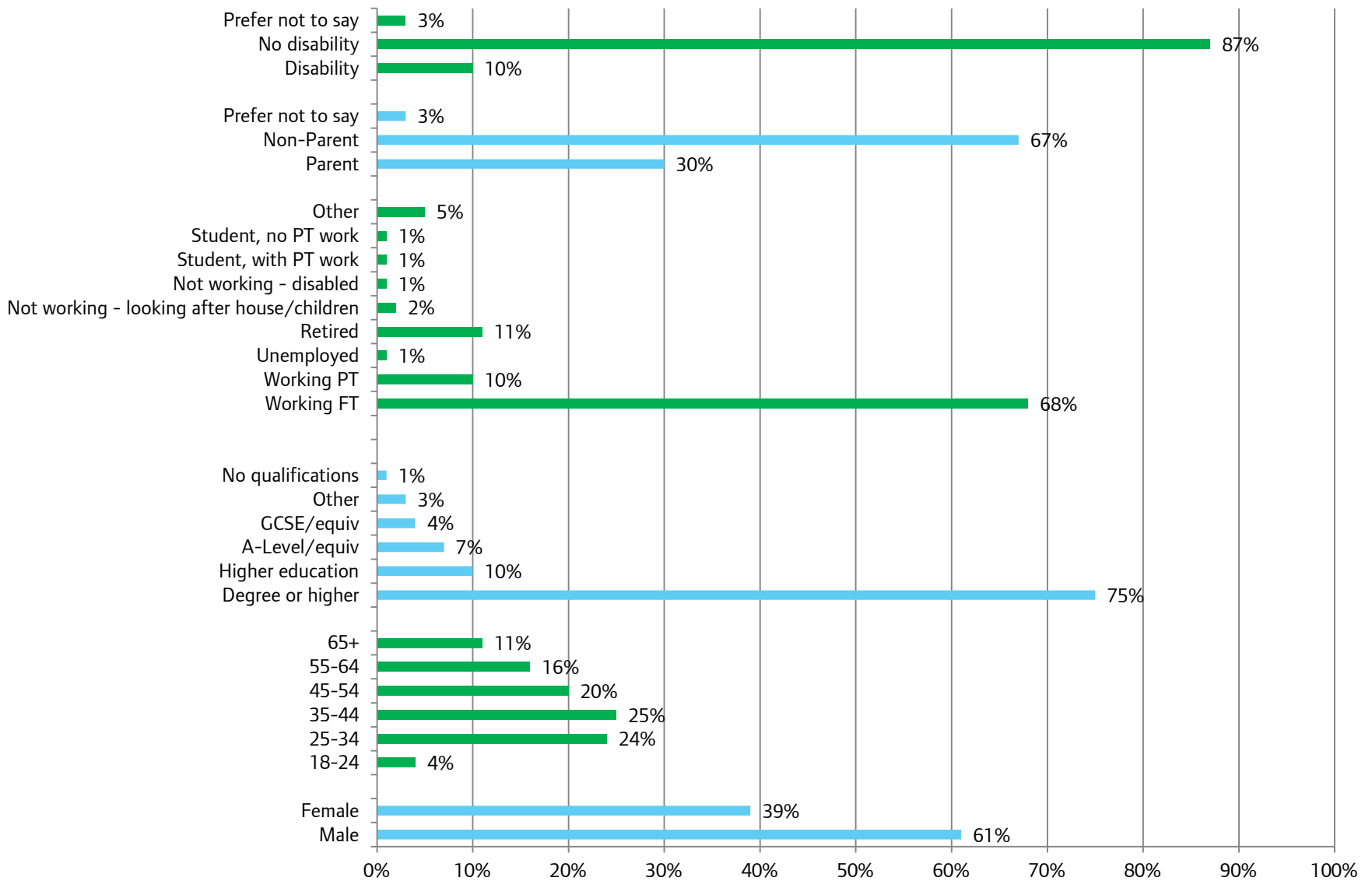


Do you drive in CCZ? If so, how often?

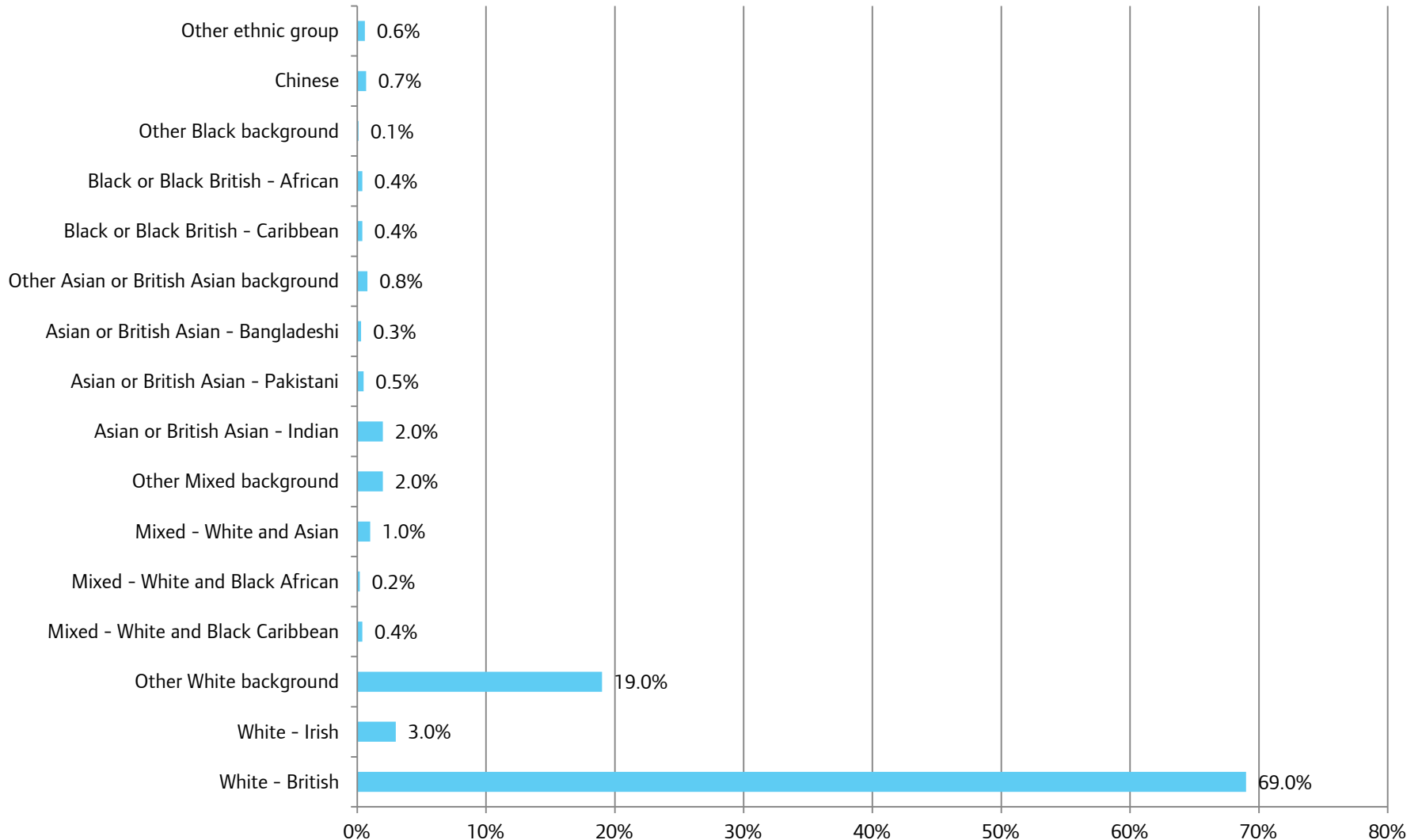


APPENDIX

RESPONDENT PROFILE (Talk London Survey)



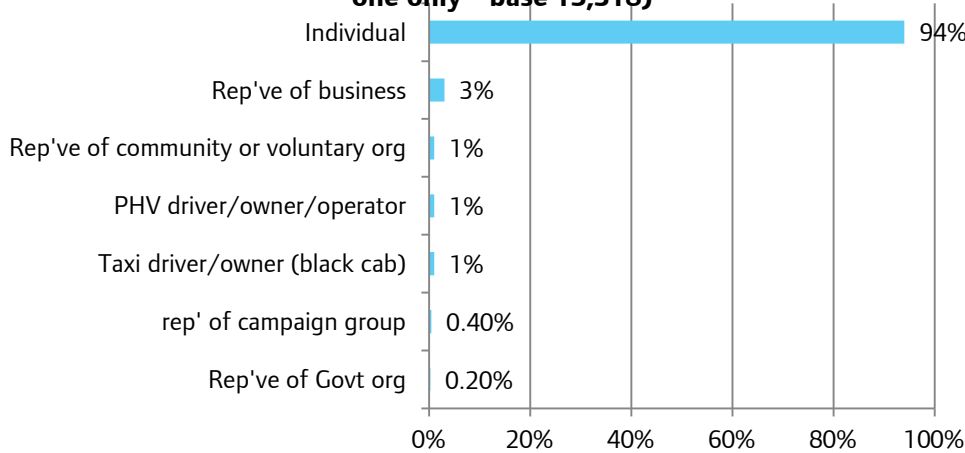
RESPONDENT PROFILE (Talk London Survey)



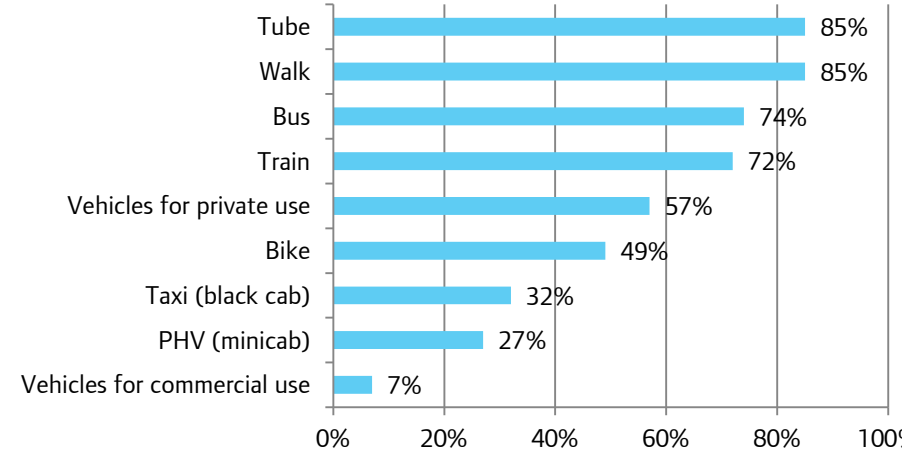
APPENDIX

RESPONDENT PROFILE (Talk London Survey Cont'd)

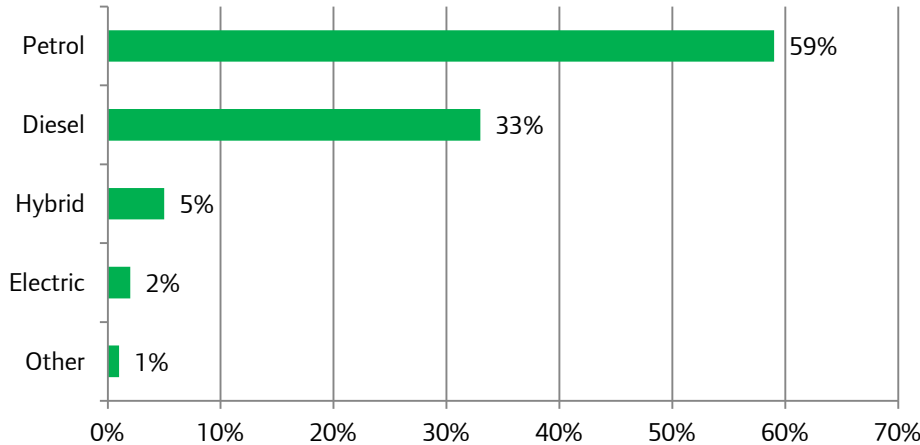
In what capacity are you responding to this consultation? (tick one only - base 15,318)



What types of transport do you use in London? (tick all that apply - base 15,318)



**Among 'vehicles for private use' users only (base 8,762).
What type of vehicle do you use?**



Do you drive in CCZ? If so, how often? (base 15,316)

