

Proposals to help improve air quality, tackle the climate emergency, and reduce congestion by expanding the ULEZ London-wide and other measures

Proposals for the Ultra Low Emission Zone expansion in 2023 and shaping the future of road user charging

Transport for London

## Quality information

Prepared by	Checked by	Verified by	Approved by
Grace Butler Graduate Consultant	Jodie Knight Principal Consultant	Neil Rogers Principal Consultant	Tamsin Stuart Regional Director
Hannah Dodd Senior Consultant	Alex Lerczak Consultant		

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## Distribution List

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Prepared for:  
Transport for London

Prepared by:  
Neil Rogers  
Principal Consultant

Grace Butler  
Graduate Consultant

Hannah Dodd  
Senior Consultant

AECOM Infrastructure & Environment UK Limited  
1 New York Street  
Manchester M1 4HD  
United Kingdom

T: +44 161 601 1700  
aecom.com

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# 1. Introduction

## 1.1 Background: Overview of the consultation

In 2018, the Mayor's Transport Strategy (MTS) set out the planned expansion of the Ultra Low Emission Zone (ULEZ) to inner London, which following a public and stakeholder consultation on detailed scheme proposals, was confirmed by the Mayor and launched in October 2021.

Transport for London (TfL), on behalf of the Mayor, undertook a public and stakeholder consultation between 20 May 2022 and 29 July 2022 on a revision to the MTS including a proposal (Proposal 24.1) to address the triple challenges of toxic air pollution, the climate emergency and traffic congestion through road user charging schemes including expanding the ULEZ London-wide. (The results of the MTS revision consultation are reported separately.)

As part of the consultation TfL, on behalf of the Mayor, consulted on detailed "scheme proposals" to amend the current ULEZ scheme to expand the ULEZ to outer London, so that it would operate London-wide from 29 August 2023 with the aim of tackling harmful emissions from the most polluting vehicles, thereby improving air quality and the health of Londoners.

In addition, the consultation explored the potential for the future of road user charging and asked Londoners to help shape any potential plans for the years ahead.

**Figure 1.1 Summary of ULEZ expansion proposals**

Proposals	
<b>Expanding the ULEZ London-wide from 29 August 2023</b>	<ul style="list-style-type: none"> <li>Expanded to cover most of Greater London (following the Low Emission Zone boundary)</li> <li>No change to daily charge of £12.50 for anyone driving a vehicle which does not meet the emissions standards</li> <li>Operates 24 hours a day, seven days a week, 364 days a year, excluding Christmas Day, as it does currently</li> </ul>
<b>Discounts and Exemptions*</b>	<ul style="list-style-type: none"> <li>Some drivers and vehicles would qualify for at least a temporary discount from the ULEZ charge. Others would be entirely exempt.</li> </ul> <p><b>Discounts and exemptions proposed to be extended until Sunday 24 October 2027</b></p> <ul style="list-style-type: none"> <li>Disabled and disabled passenger tax class vehicles</li> <li>Wheelchair accessible private hire vehicles</li> </ul> <p><b>Discounts and exemptions proposed to be extended until Sunday 26 October 2025</b></p> <ul style="list-style-type: none"> <li>Minibuses used for community transport</li> </ul> <p><b>Discounts and exemptions which have not changed:</b></p> <ul style="list-style-type: none"> <li>London licensed Taxis</li> <li>Historic vehicles</li> <li>Specialist non-road going vehicles</li> <li>Showman's vehicles</li> </ul>
<b>Remove the annual £10</b>	<ul style="list-style-type: none"> <li>Current fee: £10</li> </ul>

\*In addition, some drivers can claim reimbursement of the ULEZ daily charge under an NHS patient reimbursement scheme.

<b>registration fee for Auto Pay</b>	<ul style="list-style-type: none"><li>• Proposed fee: FREE</li></ul>
<b>Changes to penalty charge notices (PCN) for non-payment for the ULEZ and Congestion Charge</b>	<ul style="list-style-type: none"><li>• Current level: £160</li><li>• Proposed level: £180</li></ul>

## 1.2 The consultation

TfL held a public and stakeholder consultation between 20 May 2022 and 29 July 2022 on detailed “scheme proposals” to expand the ULEZ to outer London to the current Low Emission Zone (LEZ) boundary, so that it would operate London-wide from 29 August 2023. The consultation included the other proposals set out in Figure 1.1 above. The findings from the consultation will be used to inform a decision by the Mayor of London about whether or not to confirm the above ULEZ expansion proposals, with or without modifications.

The consultation also asked the public and stakeholders questions that would help shape any potential future road user charging.

AECOM were appointed to carry out the following tasks:

- Thematic coding of open-ended questions;
- Quantitative analysis of the closed questions and demographic questions;
- Cleaning and analysis of postcode data provided; and
- Mapping of respondent location.

## 1.3 The questionnaire

TfL designed and hosted the questionnaire on Have your say, the TfL consultation portal, the topics raised in the questionnaire included:

- Concerns about air quality;
- Current vehicle compliance with the emission standards required to drive in London;
- The proposed implementation date to expand the ULEZ London-wide;
- Future interventions for those who are not compliant;
- Discounts, exemptions and reimbursements;
- A vehicle scrappage scheme, penalty charge notice levels (PCN), use of automatic number-plate recognition (ANPR) data and Auto Pay fees; and
- The future of road user charging.

Demographic data was also provided by respondents during the registration process.

Questions asked in relation to the revision of the Mayor’s Transport Strategy (MTS), are being reported separately.

A copy of the questionnaire can be found in **Appendix A**.

## 1.4 Format of report

Following this introduction:

Chapter 2: describes the methodology used;

Chapter 3: details the key findings to the ULEZ section of the consultation;

Chapter 4: details the key findings about addressing the triple challenges affecting London;

Chapter 5: details the key findings to the future of road user charging section of the consultation; and

Chapter 6: provides feedback on the consultation process and material.

## 2. Methodology

### 2.1 Receiving responses

Most responses were received via the consultation questionnaire hosted on the TfL portal. To ensure inclusivity, TfL also gathered responses via email and hardcopy questionnaire. An “easy read” version of the questionnaire was also available.

TfL entered all responses received by methods other than the online questionnaire into the TfL portal. The database was delivered to AECOM in weekly batches for processing, analysis, and reporting.

### 2.2 Campaigns

When analysing the responses, it is apparent there has been several campaigns. The campaigns identified were:

- **Fair Fuel UK:** a total of 4,726 responses were received in connection to a campaign on behalf of motorists.
- **Living Streets:** a total of 544 identical responses were received in connection to Living Streets Charity UK;
- **London Cycling Campaign:** a total of 1,581 responses were received in connection to the London Cycling Campaign; and
- **London Friends of the Earth Network (via Action Network):** a total of 705 responses were received in connection with London Friends of the Earth;
- **Wearepossible.org:** a total of 4,312 responses were received in connection to a campaign focused on a zero carbon society.

The standard response provided by these campaigns is shown in **Appendix B**. Respondents were able to change the text or answers offered as standard before submitting.

In addition, there were two further sources of information offering opinions about the ULEZ.

- **The London Borough of Bexley:** communicated a point of view to residents, but residents were then required to actively seek out and provide their own response to the consultation themselves, as opposed to a campaign where a standard response may be sent by completing a form or forwarding an email; and
- **38 Degrees.org:** there was a petition held on their website about the ULEZ but required people to send their own views about the ULEZ, therefore responses varied.

### 2.3 Thematic coding

All free-text responses and letters and emails were grouped into themes to allow meaningful analysis. Letter and email responses were combined with the free text comments given in the questionnaire for analysis purposes.

Where possible, free text responses have been analysed by topic rather than response to a question to allow meaningful analysis and avoid double counting where respondents have given the same response to several questions.

The themes from each question were created by AECOM using the initial set of responses, and these were verified by TfL before full coding began. Where new themes emerged, these

were verified before continuing. A minimum of 10 per cent quality assurance checks and validation were completed on the coding for each question by both AECOM and TfL.

## 2.4 Analysis and reporting

The consultation was open to all and, therefore, respondents were self-selecting. This, coupled with the fact respondents could choose which of the questions they answered, means the results and responses should be viewed as indicative of the wider population and any identified sub-groups rather than representative. The profile of respondents is detailed in the next section.

As respondents were not obliged to answer all questions in the questionnaire, the percentages shown only include those that responded to each question. The number of people who answered each question is shown as “n=”.

It is important to note that, unless specified, the tables within the report do not include stakeholder responses.

Where percentages do not sum to 100 per cent in the main body of the report, this is due to rounding or where more than one response was permitted.

Statistical significance testing was completed. Where results are reported as different between sub samples, this means the differences are statistically significantly different. Only data which is significantly different has been referenced in the report.

A large volume of data was received and therefore the following chapters summarise the main findings and highlight pertinent differences between groups.

## 2.5 Response

### 2.5.1 Type of respondent

A total of 57,913 responses were received, of which 334 were categorised by TfL as stakeholders. An additional 8 responses categorised as stakeholders were submitted to TfL after the deadline, these are not included in this report but have been considered in TfL’s report to the Mayor.

Of the 57,913 responses, 11,868 were identified as campaign responses, the total number of responses not including campaigns is 46,045.

The types of respondent who answered the survey is shown in Table 2.1.

**Table 2.1 Respondent type**

<b>Respondent type</b>	<b>Count</b>	<b>Percentage</b>
Employed in the current inner London ULEZ	14,081	35
Employed in outer London	11,904	30
A visitor to Greater London	4,290	11
A business owner in outer London	3,746	9
An owner of a business in the current inner London ULEZ	1,587	4
A London licensed taxi (black cab) driver	168	0.4
A London licensed private hire vehicle driver	120	0.3
None of these but interested in the proposals	9,598	24
<b>Total</b>	<b>40,032</b>	<b>100</b>

Respondents can be represented in more than one group therefore percentages do not add to 100

Respondents were able to, but not required to, provide postcode data during a registration process and in the survey. In addition, the survey asked respondents for their residency. Similarly, some respondents provided a postcode when responding as part of a campaign or by email. Table 2.2 shows the residency of each respondent where this was provided using the following priority, as agreed with TfL.

1. The respondent answered the residency question in the survey;
2. The respondent provided a postcode in the survey or as part of their email or response via a campaign;
3. The respondent provided a postcode on registration.

The postcodes were allocated to a residency using a list of postcodes provided by TfL which identified those who live in the current inner London ULEZ.

**Table 2.2 Respondent Residency**

<b>Respondent Residency</b>	<b>Count</b>	<b>Percentage</b>
In the current inner London ULEZ	12,625	22
In outer London (not in the current inner London ULEZ)	31,436	54
Lived outside of Greater London	9,765	17
Don't know / postcode not provided	4,087	7
<b>Total</b>	<b>57,913</b>	<b>100</b>

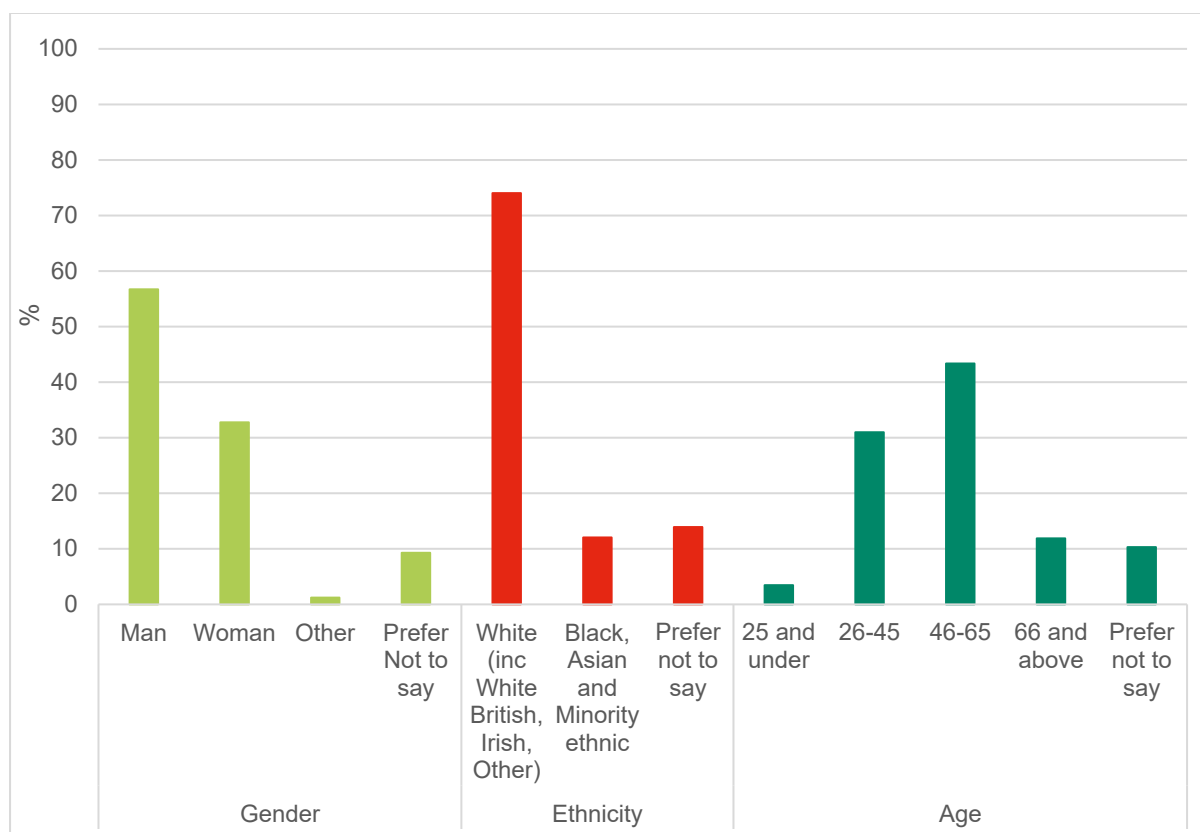
## 2.5.2 Respondent profile

Respondents provided details about themselves such as age, gender and ethnic origin. These questions were optional. The percentages in Figure 2.1 are of those who provided this information and not of all respondents. Any difference in response by demographic profile should be treated with caution.

NOTE: that those who provided a response via a campaign did not provide a full set of demographic profile questions, but some campaigns provided postcode data. Of the campaigns that provided postcode data, the split between inner and outer London and outside Greater London is as follows:

- 4,173 lived in the current inner London ULEZ;
- 2,687 lived in outer London (not in the current inner London ULEZ); and
- 4,051 lived outside of Greater London.

**Figure 2.1 Respondent profile**



Base: all respondents who provided demographic information (Gender 36,770; Ethnicity 36,773; Age 36,968).

Other information was also gathered from respondents that could influence their opinion, including residency, frequency of driving in Greater London and respondents' vehicle compliance.

### Profile of respondents compared to the population of London

The profile of those who provided a response about their gender, ethnicity and/or age and also confirmed they lived in London was used to compare with the population of London. The outcomes are as follows:

For those based in London, women were underrepresented in the survey, of those who provided a gender, 36 per cent were women compared to the 2020 Census population projections data\* of 50 per cent.

For those based in London, younger people were under represented as follows.

- 4 per cent of those who completed the survey were aged 25 and under compared to the 2020 Census population projections data\* of 19 per cent aged 13 to 25;

- 35 per cent of those who completed the survey were aged 26 to 45 compared to the 2020 Census population projections data\* of 46 per cent

There was an over representation of 46 to 65 year olds, comprising 48 per cent of those who completed the survey compared to the 2020 Census population projections data\* of 23 per cent.

There was an over representation of those responded who have a white ethnic origin with 85 per cent of those who stated their ethnicity describing themselves as white, compared to 2011 Census data\* of 60 per cent for London.

**\*Source: Office for National Statistics (ONS). At the time of writing only some census data for 2020 had been released;**

### 2.5.3 Current compliance with the ULEZ vehicle emissions standards

All respondents who completed the survey were asked whether their vehicles would meet the required emissions standards, and a vehicle checker was provided for those who were unsure.

Table 2.3 shows respondents current vehicle compliance for those that live in the current inner London ULEZ, in outer London or outside Greater London.

**Table 2.3 Respondent vehicle compliance by respondent residency (%)**

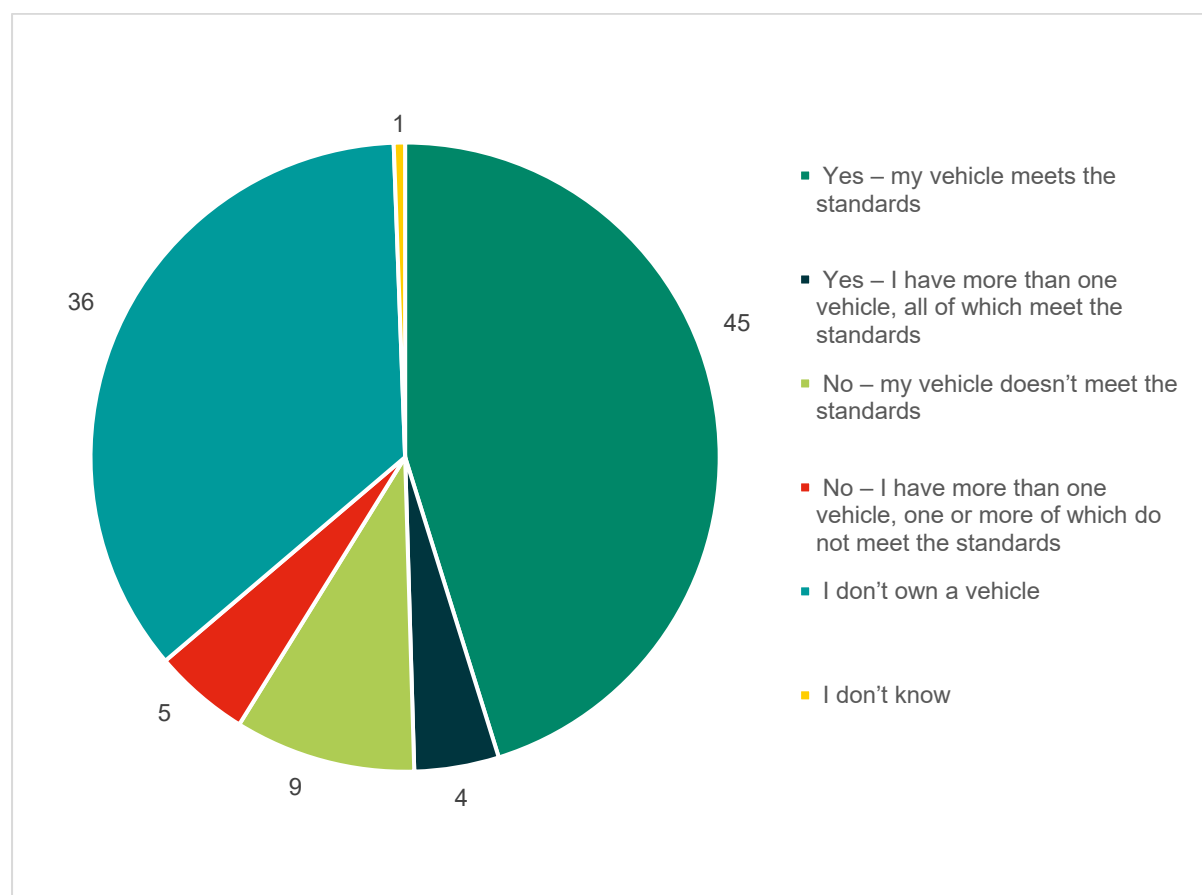
Respondent vehicle type	In the current inner London ULEZ	In outer London	Outside Greater London
Yes – my vehicle meets the standards	45	33	28
Yes – I have more than one vehicle, all of which meet the standards	4	6	5
No – my vehicle doesn't meet the standards	9	34	39
No – I have more than one vehicle, one or more of which do not meet the standards	5	20	23
I don't know	1	2	3
I don't own a vehicle	36	6	3
Total	7,859	27,551	5,509

Figure 2.2 shows the response based on residency for those who live in the current inner London ULEZ, and Figure 2.3 shows the response based on residency for those who live in outer London.

Of those respondents who live in the current inner London ULEZ, 45 per cent of the 7,859 who responded to this question own a vehicle that meets the required emissions standards, and 14 per cent own at least one vehicle which does not meet the required emissions standards. 36 per cent do not own a vehicle.



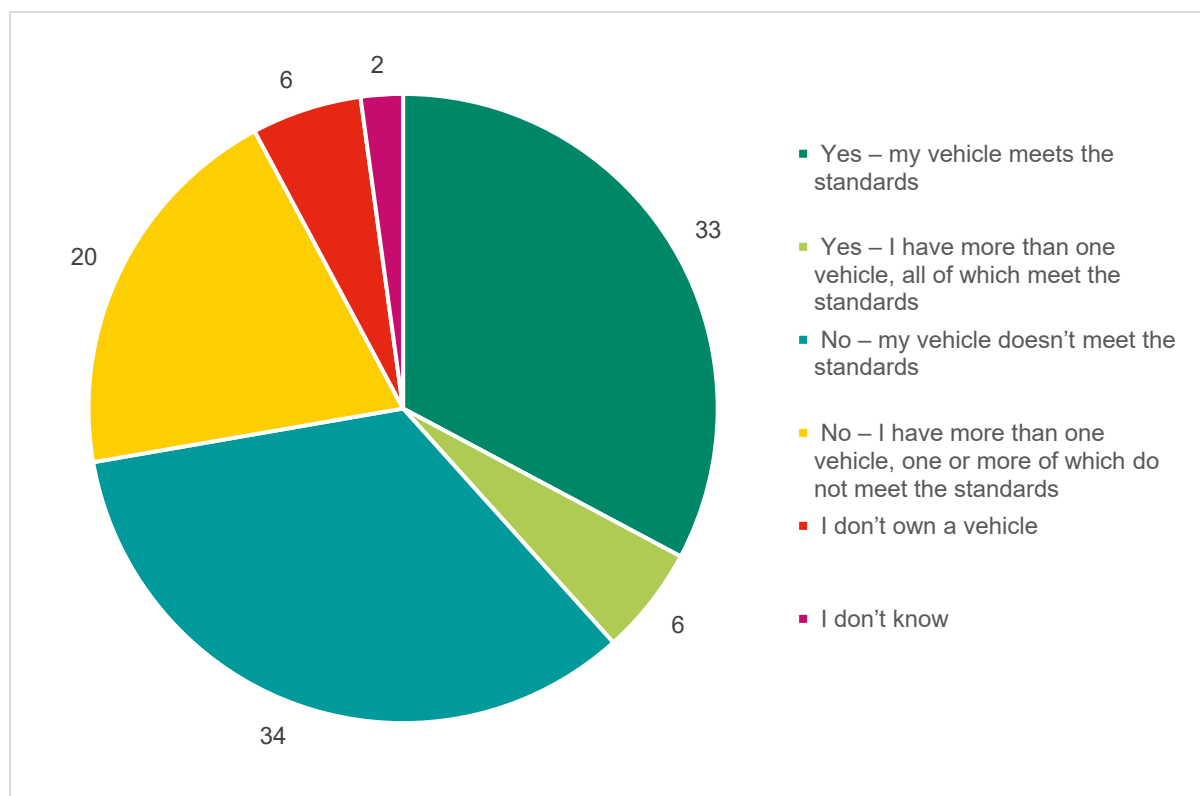
**Figure 2.2 Inner London residents: Vehicle compliance with emissions standards (%)**



Base: all respondents who answered (7,859)

Of those respondents who live in outer London, 54 per cent of the 27,551 who answered this question own at least one vehicle that does not meet the required emissions standards, 39 per cent have a vehicle that does meet the required emissions standards and 6 per cent do not own a vehicle.

**Figure 2.3 Outer London residents: Vehicle compliance with emissions standards (%)**



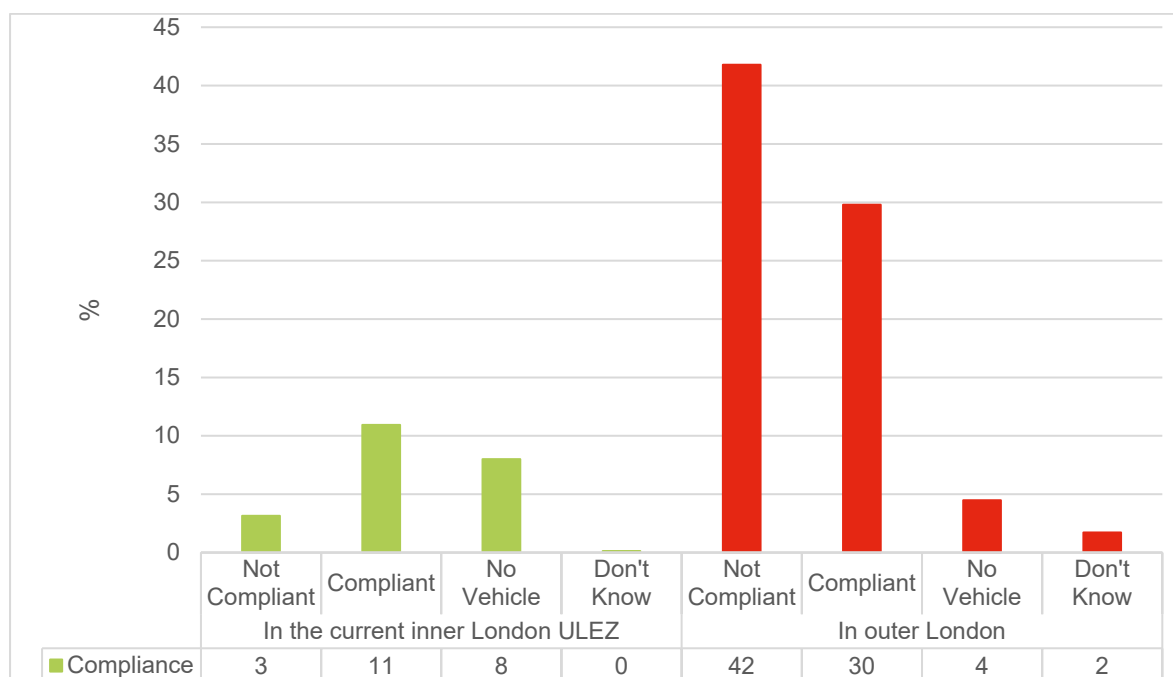
Base: all respondents who answered (27,551)

Figure 2.4 summarises the total response to the question “**Does your vehicle(s) meet the emission standards required to drive in London without paying the ULEZ charge?**”.

Of the 35,499 who responded to this question and lived in London, 45 per cent of respondents own at least one vehicle which would not meet the emissions standards and therefore would be directly impacted by the introduction of the ULEZ, of these:

- 42 per cent live in outer London; and
- 3 per cent live in the current inner London ULEZ.

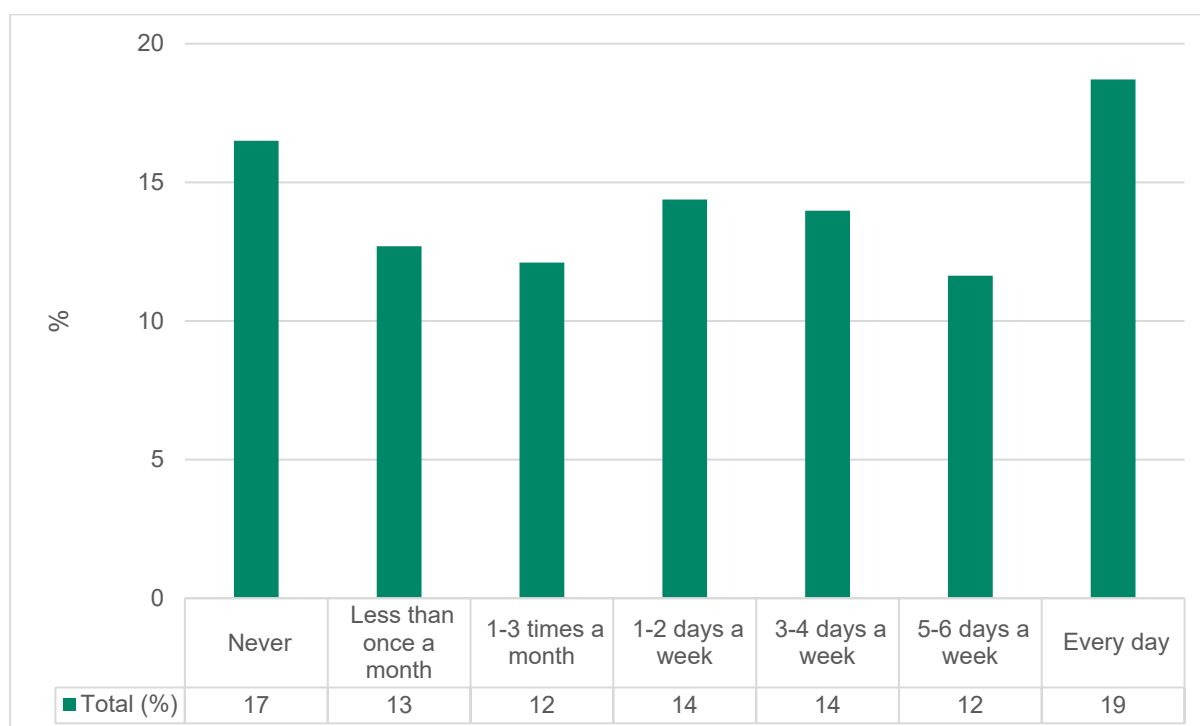
**Figure 2.4 All respondents: Current compliance to the ULEZ emissions standards**



Base: all respondents who answered (35,499)

Respondents were asked about their frequency of driving in Greater London with 19 per cent stating every day and 17 per cent stating they never drive in Greater London.

**Figure 2.5 How often do you drive in Greater London?**



Base: all respondents who answered (44,031)

## 2.5.4 Respondent location

A total of 37,222 of Greater London respondents provided a postcode. Table 2.4 below shows the location of respondents and a breakdown by London Borough.

**Table 2.4 Respondent location**

<b>Location</b>	<b>Count</b>	<b>%</b>
Barking and Dagenham	493	1
Barnet	1316	4
Bexley	2441	7
Brent	623	2
Bromley	2965	8
Camden	635	2
City of London	65	0
City of Westminster	475	1
Croydon	1845	5
Ealing	1261	3
Enfield	997	3
Greenwich	956	3
Hackney	693	2
Hammersmith and Fulham	505	1
Haringey	817	2
Harrow	1263	3
Havering	1947	5
Hillingdon	1868	5
Hounslow	1227	3
Islington	744	2
Kensington and Chelsea	320	1
Kingston upon Thames	1190	3
Lambeth	1306	4
Lewisham	1294	3
Merton	1086	3
Newham	420	1
Redbridge	801	2
Richmond upon Thames	1460	4
Southwark	1228	3
Sutton	1796	5
Tower Hamlets	758	2
Waltham Forest	834	2
Wandsworth	1393	4
<b>Total</b>	<b>37022</b>	<b>100</b>

### 3. Key findings: Proposed expansion of the ULEZ and the day-to-day administration of Road User Charging schemes

#### 3.1 Introduction

The key responses to consultation questions referring to the proposals for the expansion of the ULEZ are described in this section.

The start of the questionnaire set out the aims to improve air quality and public health, tackle the climate emergency, and reduce traffic congestion. The questionnaire included questions about the proposals for the expansion of the ULEZ London-wide, this included questions on the following:

- Concerns about air quality;
- The proposed implementation date to expand the ULEZ London-wide;
- Future intentions for those who are not compliant;
- Discounts, exemptions and reimbursements;
- A vehicle scrappage scheme;
- Changes to the penalty charge notice (PCN) levels for non-payment of the ULEZ and the Congestion Charge;
- Changes to Auto Pay fees; and
- Views about use of automatic number plate recognition (ANPR) data.

#### 3.2 Concerns about air quality in residential areas

##### 3.2.1 Overall summary

There were 55 per cent of respondents who had some concern about the air quality where they live and 35 per cent were not concerned about air quality where they live.

**Table 3.1 How concerned are you about air quality where you live? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Very concerned	30	30	18	34
Concerned	25	25	29	32
No opinion	10	10	11	12
Unconcerned	25	25	29	12
Very unconcerned	10	10	12	10
Don't know	0	0	1	1
Total	48,001	47,882	41,301	119

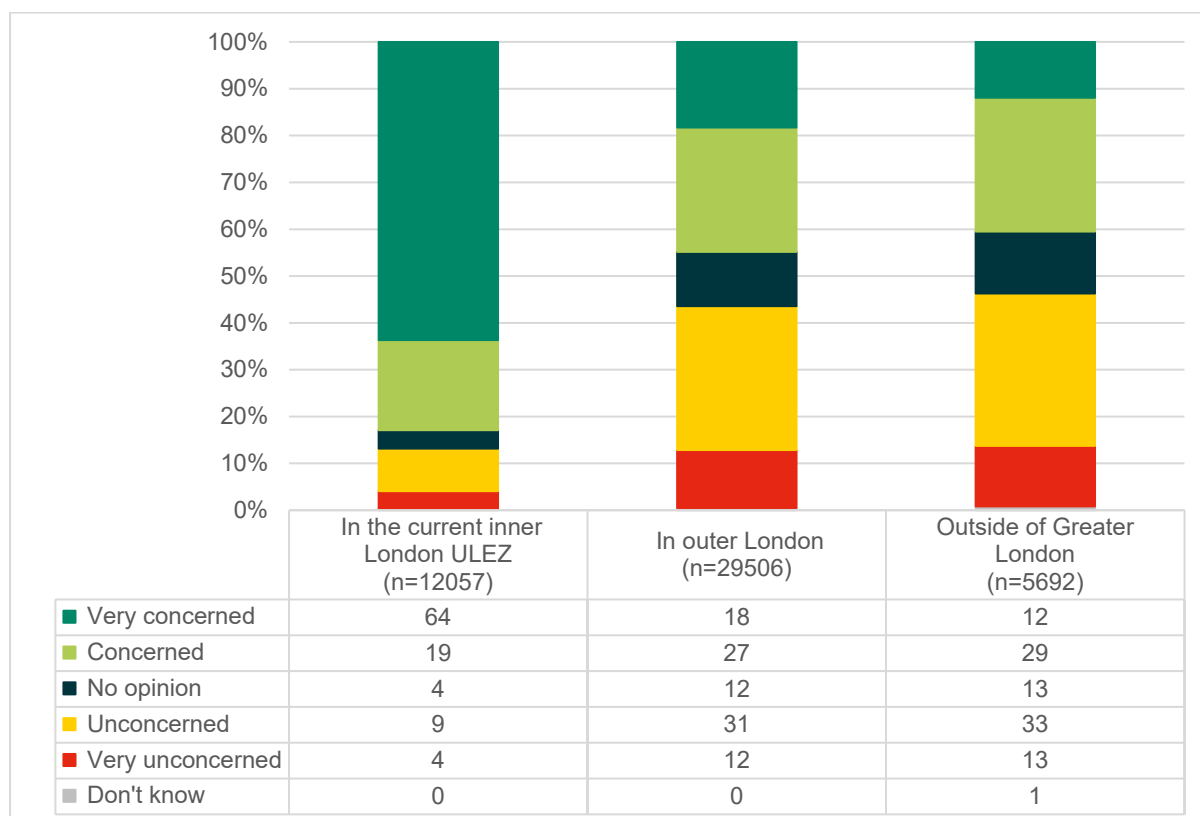
Base: all respondents (47,882 public; 119 stakeholders; 9,912 total did not answer this question)

\*Only 119 stakeholders answered this question therefore the percentages should be treated with caution

## Respondent residency

Of those respondents who live in the current inner London ULEZ, 83 per cent have a level of concern about air quality where they live. Of those who live in outer London, 43 per cent were either unconcerned or very unconcerned about air quality, similar to those living outside of Greater London (46 per cent).

**Figure 3.1 Respondent's level of concern about air quality where they live (%)**



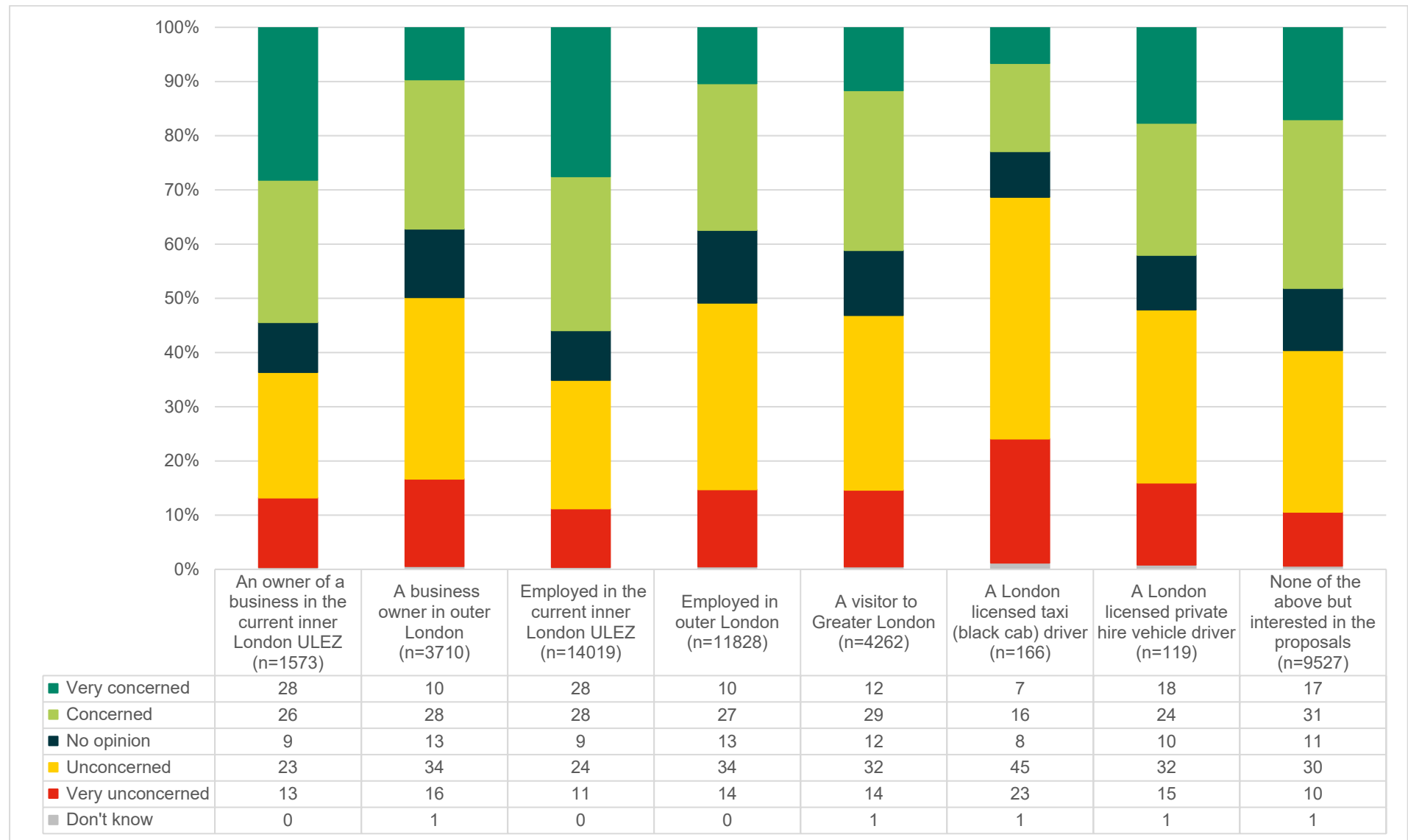
Campaign respondents' responses are included in the Figure 3.1.

## Respondent type

Respondents who were the owner of a business in the current inner London ULEZ felt some level of concern about air quality where they live (54 per cent), a similar proportion (56 per cent) of those who are employed in the current inner ULEZ felt some level of concern.

Respondents that were business owners in outer London (50 per cent) and those employed in outer London (49 per cent) felt unconcerned or very unconcerned about the air quality where they live.

**Figure 3.2 Respondent's level of concerns about air quality where they live by respondent type (%)**





### Other statistically significant differences between sub-groups:

- Those who live in outer London and own vehicles that do not meet the emissions standards for the ULEZ were more likely to say they were unconcerned (52 per cent) about air quality than concerned (33 per cent), compared to those who live in inner London and own vehicles that meet the emissions standards for the ULEZ who were more likely to be concerned with air quality (68 per cent);
- There was a link between the number of times respondents drive into Greater London and the level of concern about air quality, the less frequently the respondent drives in London, the more concerned about air quality they were, 69 per cent of those who never drive in were concerned on some level compared to 31 per cent of those who drive in everyday; and
- Of the respondents aged 45 years and under, 54 per cent were concerned about air quality on some level compared to those aged 46 and over (47 per cent).

## 3.3 Implementation

### 3.3.1 Proposed implementation date

Respondents were advised that the proposed date to expand the ULEZ was 29 August 2023.

There were 59 per cent of respondents who felt the expansion of the ULEZ should not be implemented at all, with the majority of the other respondents having a mixed view of whether the proposed implementation date for expanding the ULEZ should be earlier (12 per cent), is the right date (21 per cent) or should be later (8 per cent).

**Table 3.2 We are proposing to expand the ULEZ London-wide on 29 August 2023. What do you think of the implementation date? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Should be earlier	12	12	13	13
The right date	21	21	9	18
Should be later	8	7	9	22
Should not be implemented	59	59	68	43
I don't know	1	1	1	5
Total	48,028	47,908	41,353	120

Base: all respondents (47,908 public; 120 stakeholders; 9,885 total did not answer this question)

\*Only 120 stakeholders answered this question therefore the percentages should be treated with caution

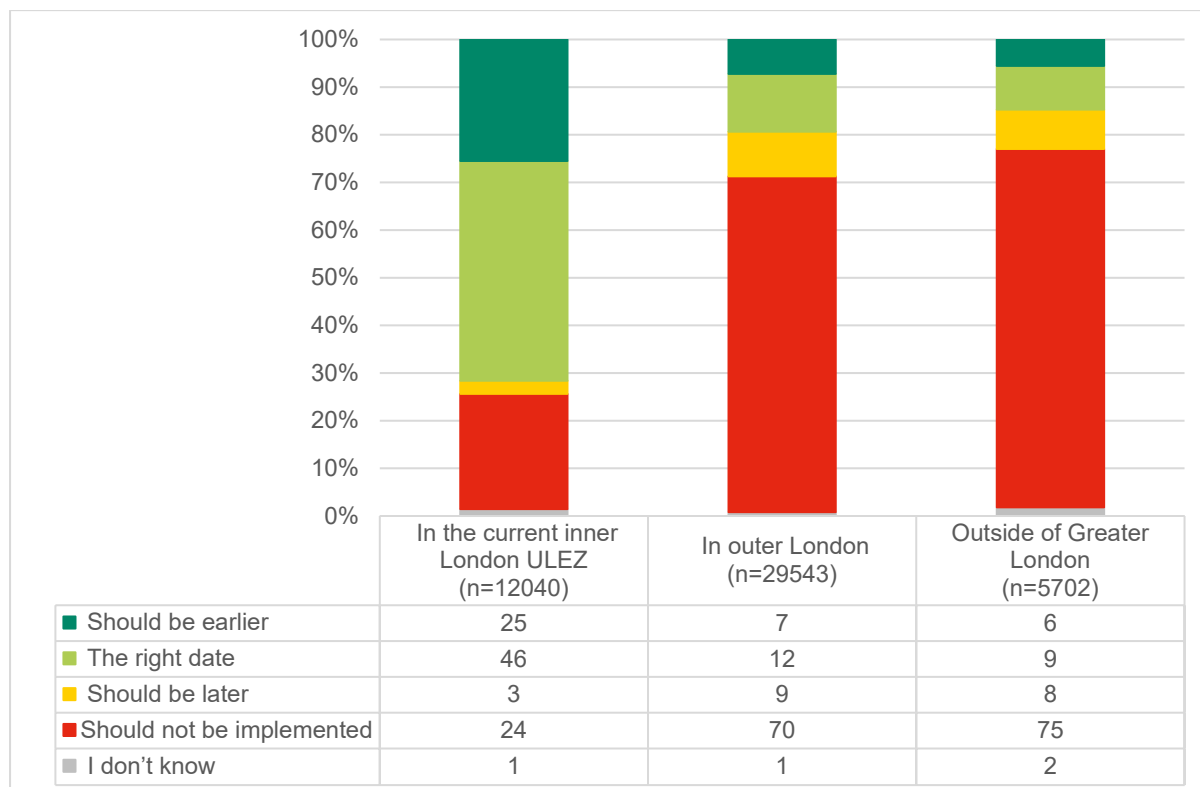
Of those who wanted the implementation date to be earlier, 98 per cent were concerned on some level about air quality, compared to 30 per cent of those who did not want the proposal implemented at all.

## Respondent residency

Of those respondents who live in the current inner London ULEZ, 25 per cent felt the expansion of the ULEZ should be implemented earlier, whilst 24 per cent felt the ULEZ expansion should not be implemented at all. 70 per cent of respondents who live in outer London felt the ULEZ expansion should not be implemented at all.

Respondents living outside of Greater London were most likely to say the expansion should not be implemented at all (75 per cent).

**Figure 3.3 Respondent's opinions about the proposed implementation date based on residency (%)**



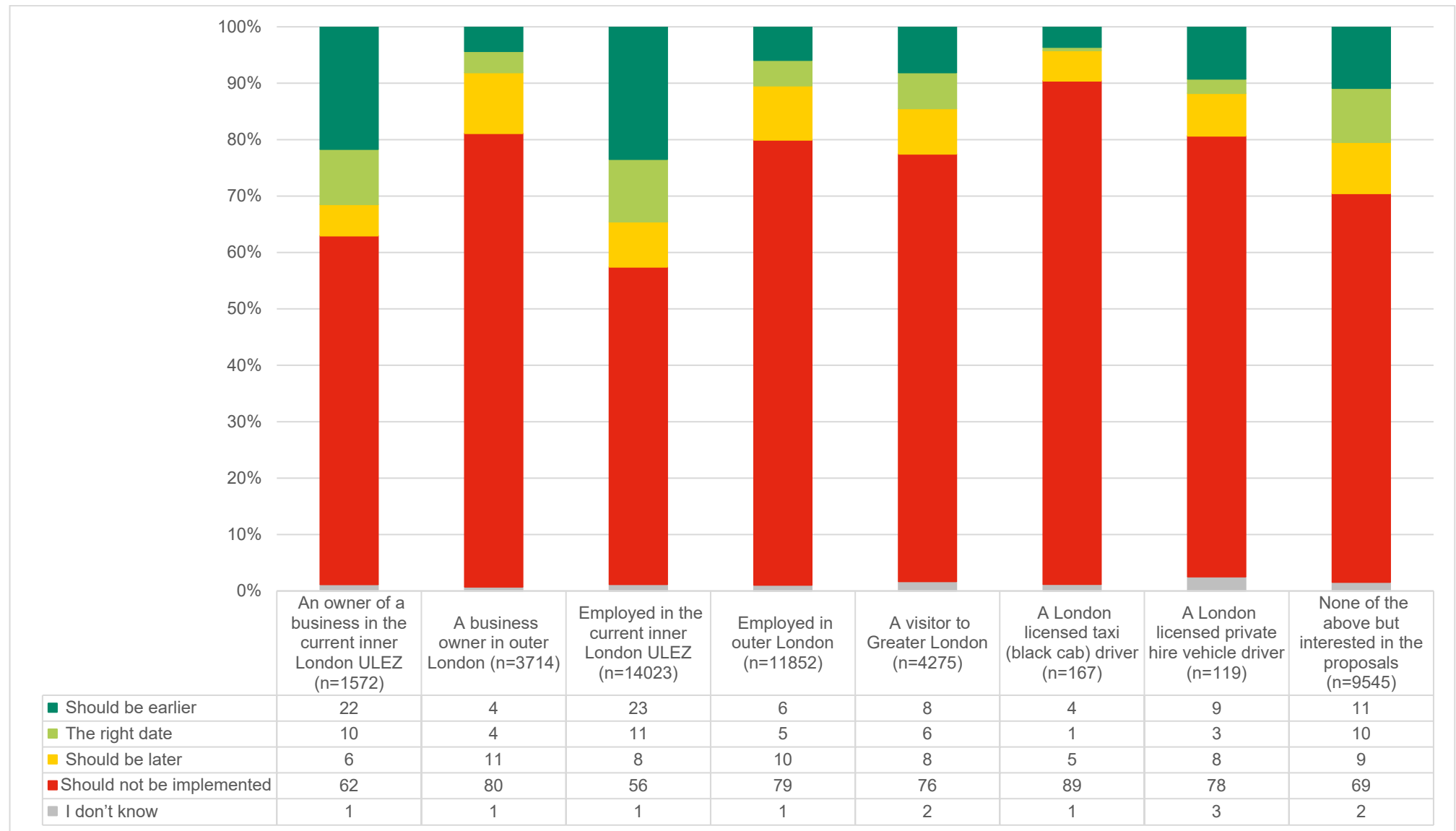
Campaign respondents' responses are included in Figure 3.3.

## Respondent type

Across all respondent types over half felt the proposed ULEZ expansion should not be implemented at all, ranging from 56 per cent to 89 per cent.

Respondents who owned a business in the current inner London ULEZ (22 per cent) and those who were employed in the current inner London ULEZ (23 per cent) were more likely to say they wanted the implementation date to be earlier, compared to other respondents (ranging from four per cent to 11 per cent).

**Figure 3.4 Respondent's opinions about the proposed implementation date, by respondent type (%)**



**Other statistically significant differences between sub-groups:**

- Those who own at least one vehicle that does not meet the ULEZ emissions standards were more likely to feel the London-wide ULEZ should not be implemented at all (83 per cent), compared with those who own vehicles that meet the ULEZ emissions standards (65 per cent think it should not be implemented at all). 58 per cent of respondents who do not own a vehicle feel the ULEZ should be implemented earlier;
- There was a strong link between the frequency of driving in London and those who felt the ULEZ expansion should not be implemented at all, with 40 per cent of those who never drive feeling this compared to 86 per cent of those who drive in every day; and
- There was a similar link based on age with younger people more likely to say they wanted the ULEZ expansion to be implemented earlier than the proposed date (26 per cent of those aged 25 and under) down to 8 per cent of those aged 66 and above.

## 3.4 Future intentions

### 3.4.1 Overall summary

Respondents were asked what they intend to do if they own a vehicle(s) that is not currently compliant with emissions standards for the ULEZ. All respondents were able to respond to the question and are included in Table 3.3 whether compliant or non-compliant.

**Table 3.3 If you own a vehicle(s) that is not currently compliant with emissions standards and we proceed with our proposals, what do you intend to do? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Walk or cycle more	7	7	7	11
Use public transport more	10	10	10	12
Use taxis or private hire vehicles more	4	4	4	4
Use a car club	2	2	2	6
Trade the vehicle in for a compliant one	18	18	18	22
Get rid of the vehicle	12	12	12	12
Pay the charge when using vehicle	21	21	21	27
Not make journeys I would have done	23	23	23	24
Do something else that's not listed	22	22	22	30
Don't know	27	27	27	15
Total	30,715	30,622	30,618	93

Base: all respondents (30,622 public; 93 stakeholders; 27,198 total did not answer this question)

\*Only 93 stakeholders answered this question therefore the percentages should be treated with caution  
Respondents could choose more than one option and therefore percentages will not equal 100 per cent

Table 3.4 shows the responses of respondents based on their vehicle ownership and their current compliance with the emissions standards for the ULEZ.

Those who own a vehicle(s) that does not meet the emissions standards mainly said they would not make the journeys they normally would have (26 per cent), did not know what they would do (26 per cent) and 25 per cent said they would pay the charge. 20 per cent of respondents who own vehicles which would not meet the emissions standards for the ULEZ said they would trade their vehicle in and 13 per cent said they would get rid of their vehicle.

Those who do not own vehicles were most likely to say they would walk or cycle more (41 per cent) or use public transport (44 per cent).

**Table 3.4 The intended action if ULEZ proposals proceed, based on whether vehicles owned comply with the emissions standards (%)**

	Meet standards	Do not meet standards	Do not own vehicles	Don't know / did not answer
Walk or cycle more	8	4	41	6
Use public transport more	11	6	44	8
Use taxis or private hire vehicles more	5	3	11	4
Use a car club	2	1	9	1
Trade the vehicle in for a compliant one	17	20	11	8
Get rid of the vehicle	10	13	13	7
Pay the charge when using vehicle	16	25	7	15
Not make journeys I would have done	20	26	14	20
Do something else that's not listed	21	23	9	26
Don't know	28	26	23	38
Total	8,637	19,314	1,784	786

Base: all respondents (30,622)

\* Respondents could choose more than one option and therefore percentages will not equal 100 per cent

### Respondent type by compliance

Figure 3.5 only shows the respondent types who have vehicles that do not meet emission standards for the ULEZ.

Most owners of a business in the current inner London ULEZ (39 per cent) said they would pay the charge, those who are visitors to Greater London mostly said they would not make journeys they normally would have (42 per cent).

Of those respondents who drive in London at least 5 days per week, 20 per cent would trade in their vehicle for a compliant one and 19 per cent would not make the journeys they would have done, however 30 per cent stated they did not know what they would do.

**Table 3.41 If you own a vehicle(s) that is not currently compliant with emissions standards and we proceed with our proposals to expand the ULEZ to outer London, what do you intend to do? (%)**

**Respondents who own at least one vehicle that does not meet the required emissions standards for the ULEZ**

	<b>An owner of a business in the current inner London ULEZ</b>	<b>A business owner in outer London</b>	<b>Employed in the current inner London ULEZ</b>	<b>Employed in outer London</b>	<b>A visitor to Greater London</b>	<b>A London licensed taxi (black cab) driver</b>	<b>A London licensed private hire vehicle driver</b>	<b>None of the above but interested in the proposals</b>
Walk or cycle more	6	2	6	3	3	4	5	5
Use public transport more	7	3	8	5	7	5	3	7
Use taxis or private hire vehicles more	6	3	4	2	3	18	15	3
Use a car club	2	1	2	1	1	5	5	1
Trade the vehicle in for a compliant one	16	19	24	21	14	20	30	19
Get rid of the vehicle	11	13	15	14	8	16	20	14
Pay the charge when using vehicle	39	27	30	21	30	27	25	23
Not make journeys I would have done	23	21	26	22	42	20	43	28
Do something else that's not listed	28	29	22	25	24	25	23	20
Don't know	17	25	23	31	18	27	33	26
Base	535	2493	5001	6981	2479	55	40	4174

\*Respondents could choose more than one option from each question and therefore percentages will not equal 100 per cent

### Other statistically significant differences between sub-groups:

- If the proposal is implemented, those who live in the current inner London ULEZ are more likely to say they will walk or cycle (23 per cent) or use public transport (25 per cent) compared to those living in outer London (5 per cent and 8 per cent respectively) or outside Greater London (4 per cent and 7 per cent, respectively);
- Respondents who lived outside of Greater London were more likely to say they would not make the journeys they normally would have than those who live in inner London or outer London (35 per cent compared to 17 per cent and 22 per cent, respectively);
- Those who wanted the implementation date earlier than the proposed date were more likely say they would walk or cycle (55 per cent) or use public transport more (55 per cent) compared to respondents who feel the proposal should not be implemented at all (2 per cent and 4 per cent, respectively);
- Younger respondents (aged 25 or under) said they were more likely to walk or cycle (16 per cent) or use more public transport (20 per cent), compared to older age groups (ranging from 5 per cent to 12 per cent); and
- Those aged 66 and above were more likely to not make journeys they would have made (31 per cent) than younger age groups (ranging from 22 per cent to 23 per cent), those aged 26-45 were more likely to trade their vehicle in for a compliant one (23 per cent) when compared to the other age groups (ranging from 16 per cent to 19 per cent).

## 3.5 Discounts and exemptions

### 3.5.1 Overall summary

A small proportion of all respondents (2 per cent) are registered for a discount or entitled to an exemption for the current ULEZ.

**Table 3.5 Are you registered for a discount or entitled to an exemption for the current ULEZ? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Yes	2	2	2	10
No	91	91	91	77
Don't Know	7	7	7	13
Total	41,153	41,039	41,024	114

Base: all respondents (41,039 public; 114 stakeholders; 16,760 total did not answer this question)

\*Only 113 stakeholders answered this question therefore the percentages should be treated with caution

Respondents who said they were registered for a discount or entitled to an exemption were asked to indicate the discount or exemption that is relevant to them.

Of the 2 per cent (714 respondents) who were registered for a discount or exemption, 695 respondents indicated the type of discount or exemption they had. Of these, 45 per cent had a 'disabled' or 'disabled passenger vehicle' tax class discount or exemption, 37 per cent indicated they had another type of discount or exemption that was not listed, while 13 per cent said they had a historic vehicle discount.

Of the 37 per cent of those who said they had some other discount or exemption not listed in the survey, there were two main outcomes, either they owned an electric vehicle or there was no comment from respondents. It is important to note that electric vehicles are not classed as discounted or exempt as they are compliant with the ULEZ emissions standards.

Of the 166 London licensed taxi (black cab) drivers who responded to this question in the survey, 37 drivers (22 per cent) stated they were registered for a discount or exemption for the current ULEZ.

**Table 3.6 Please indicate the relevant discount or exemption (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Vehicles for disabled people (with 'disabled' or 'disabled passenger vehicle' tax class)	45	45	45	9
Minibuses used for community transport registered for discount	1	0	0	36
Wheelchair-accessible private hire vehicles	1	1	1	0
Other exempt vehicles, such as specialist agricultural, military, non-road going and mobile	1	1	1	0
Taxis	6	6	6	9
Historic vehicles	13	12	12	18
Showman's vehicles registered for discount	1	1	1	18
Other	37	37	37	9
Total	695	684	684	11

Base: all respondents (684 public; 11 stakeholders; 57,218 total did not answer this question)

\*Only 11 stakeholders answered this question therefore the percentages should be treated with caution

Less than one per cent (0.2 per cent) of all respondents have claimed a reimbursement of the ULEZ charge under the NHS patient reimbursement scheme.

**Table 3.7 Have you claimed a reimbursement of the ULEZ charge under the NHS patient reimbursement scheme? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Yes	0.2	0.2	0	3
No	99	99	99	95
Don't Know	1	1	1	3
Total	40997	40884	40,874	113

Base: all respondents (40,884 public; 113 stakeholders; 16,916 total did not answer this question)

\*Only 113 stakeholders answered this question therefore the percentages should be treated with caution



### 3.5.2 Importance of continuing existing discounts, exemptions and reimbursements for the ULEZ

There were 64 per cent of all respondents who felt that continuing to have the existing discounts, exemptions and reimbursements is either important or very important, while 10 per cent of all respondents feel it is unimportant or very unimportant.

**Table 3.8 How important do you consider it is to continue to have these existing discounts, exemptions and reimbursements for the ULEZ? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Very important	46	46	46	61
Important	20	20	19	22
No opinion	18	18	18	10
Unimportant	5	5	5	1
Very unimportant	5	5	5	4
Don't Know	6	6	6	2
Total	41,792	41,673	41,054	119

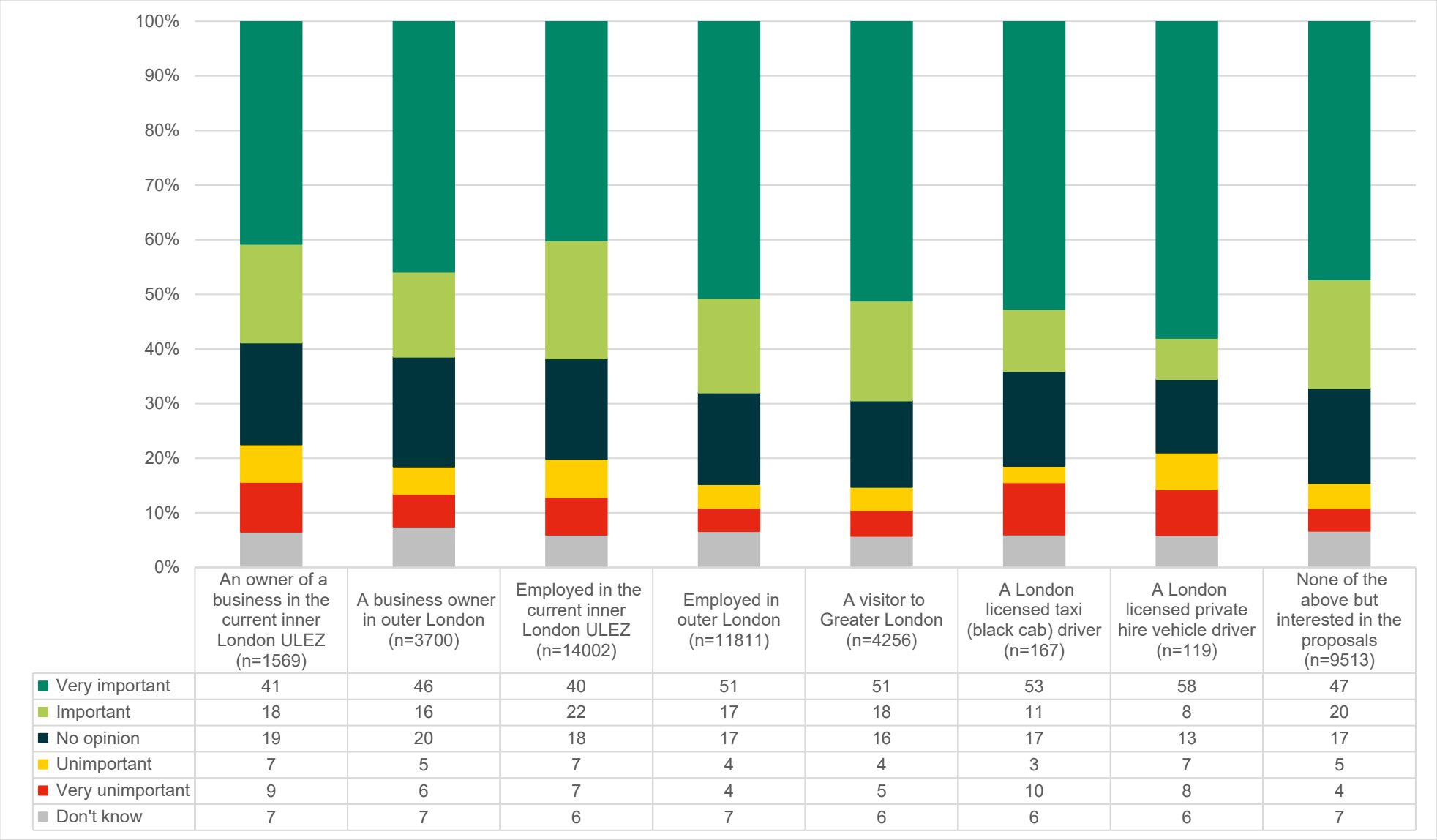
Base: all respondents (41,673 public; 119 stakeholders; 16,121 total did not answer this question)

\*Only 119 stakeholders answered this question therefore the percentages should be treated with caution

#### Respondent Type

All respondent types were more likely to feel that extending the existing discounts, exemptions and reimbursements was important on some level (ranging from 59 per cent to 69 per cent), with smaller proportions feeling it was unimportant on some level (ranging from 9 per cent to 16 per cent).

Figure 3.5 How important do you consider it is to continue to have these existing discounts, exemptions and reimbursements for the ULEZ?



### Other statistically significant differences between sub-groups

- Female respondents were more likely to think it was important on some level (74 per cent) compared to male respondents (62 per cent);
- Respondents aged 25 or under or aged 25-45 were more likely to think it was unimportant on some level (11 per cent and 12 per cent, respectively) compared to those aged 46-65 (nine per cent) and those aged 66 and above (7 per cent); and
- Those who consider themselves to be disabled were more likely to think it was very important (61 per cent) compared to 45 per cent of those who do not consider themselves disabled.

### 3.5.3 Should further discounts, exemptions or reimbursements be provided for the ULEZ

Of the respondents, 54 per cent felt further discounts, exemptions and reimbursements should be provided for the ULEZ, whilst 21 per cent felt there should not be any further discounts, exemptions or reimbursements.

**Table 3.9 Do you think we should provide any further discounts, exemptions or reimbursements for the ULEZ? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Yes	54	54	61	71
No	29	29	20	15
Don't know	17	17	20	15
Total	46,192	46,076	41,071	116

Base: all respondents (46,076 public; 116 stakeholders; 11,721 total did not answer this question)

\*Only 116 stakeholders answered this question therefore the percentages should be treated with caution

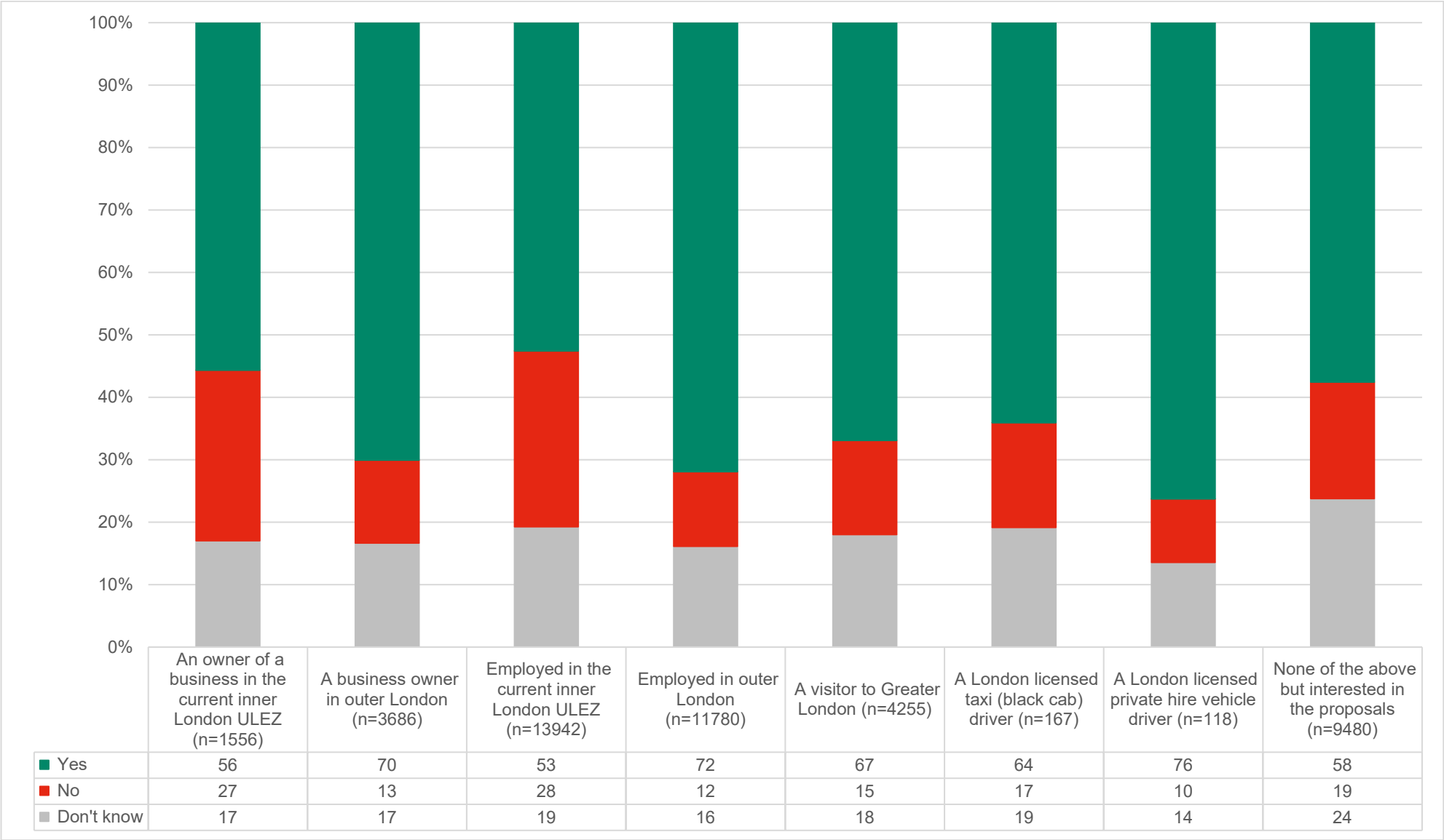
Of the campaign responses, 4,981 felt there should be no further discounts, exemptions or reimbursements.

### Respondent Type

27 per cent of business owners in the current inner London ULEZ and 28 per cent of those employed in the current inner London ULEZ were more likely to think there should not be any further discounts, exemptions and reimbursements when compared to other respondent types.

Those who are business owners in outer London (70 per cent), employed in outer London (72 per cent) or a London licensed private hire vehicle (77 per cent) were most likely to say they did want further discounts, exemptions and reimbursements.

Figure 3.6 Do you think we should provide any further discounts, exemptions or reimbursements for the ULEZ?



## Other statistically significant differences between sub-groups

- 67 per cent of those that wanted the proposal implemented earlier did not think further discounts, exemptions or reimbursements were required, compared to 9 per cent of those who did not want the proposal implemented at all. 75 per cent of those who did not want the proposal implemented at all felt there should be further discounts and exemptions;
- There is a link between the frequency respondents travel in Greater London and if they want further discounts, exemptions and reimbursements, with those who travel in every day (73 per cent) more likely to want further discounts, exemptions or reimbursements, compared to those who travel in less than once a month (48 per cent);
- Female respondents were more likely to want further discounts, exemptions or reimbursements (62 per cent) compared to male respondents (58 per cent);
- Those who consider themselves to be disabled were more likely to want further discounts, exemptions or reimbursements (68 per cent) compared to 58 per cent of those who do not consider themselves disabled; and
- Those respondents who identified as Black, Asian and minority ethnic groups were more likely to want further discounts, exemptions or reimbursements (66 per cent) compared to 58 per cent of respondents who identify as White (including White British, Irish, Other).

## 3.6 Vehicle scrappage scheme

### 3.6.1 The important of a supporting scrappage scheme

There were 69 per cent of respondents who felt it was important on some level that the proposed expansion of the ULEZ is supported by a scrappage scheme.

**Table 3.10 How important is it that the proposed expansion of the ULEZ is supported by a scrappage scheme? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Very important	55	55	49	57
Important	14	14	16	16
No opinion	10	10	12	14
Unimportant	7	7	8	3
Very unimportant	10	10	11	8
Don't Know	4	4	5	2
Total	46,358	46,238	41,259	120

Base: all respondents (46,238 public; 120 stakeholders; 11,555 total did not answer this question)

\*Only 120 stakeholders answered this question therefore the percentages should be treated with caution

4,977 campaign responses felt it was important on some level that the proposed expansion of the ULEZ was supported by a scrappage scheme.

### Respondent Type

All types of respondents felt the scrappage scheme was important on some level, with the highest being those who are employed in the current inner London ULEZ (66 per cent).

Figure 3.7 How important is it that the proposed expansion of the ULEZ is supported by a scrappage scheme?



**Other statistically significant differences between sub-groups:**

- Of those who have vehicles that do not meet the required emissions standards, 63 per cent felt it was important on some level that the proposed expansion is supported by a scrappage scheme compared to 20 per cent who feel it is unimportant on some level. Similarly, of those who have vehicles that do meet the emissions standards, 66 per cent felt it was important on some level and 19 per cent felt it was unimportant on some level;
- Female respondents were more likely to think it was important on some level (71 per cent) compared to male respondents (65 per cent); and
- There was a link between how important respondents think a supporting scrappage scheme is and age, ranging from respondents aged 66 and above who were more likely to think it is very important (55 per cent) down to those aged 25 or under (43 per cent).

## 3.7 Penalty Charge Notice (PCN) Level

### 3.7.1 Considering the proposed PCN level for ULEZ and Congestion Charge

Respondents were asked about their view for a proposed increase of the PCN level from £160 to £180 for both the ULEZ and Congestion Charge in order for the PCN to remain an effective deterrent, 71 per cent of all respondents felt the proposed PCN level of £180 would be too high.

**Table 3.11 What do you consider the proposed PCN level of £180 is? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Sufficient to act as an effective deterrent	25	25	16	34
Not high enough to act as an effective deterrent	6	6	7	3
Too high	64	64	72	57
Don't know	2	2	2	3
No opinion	3	3	3	3
Total	46,353	46,234	41,306	119

Base: all respondents (46,234 public; 119 stakeholders; 11,560 total did not answer this question)

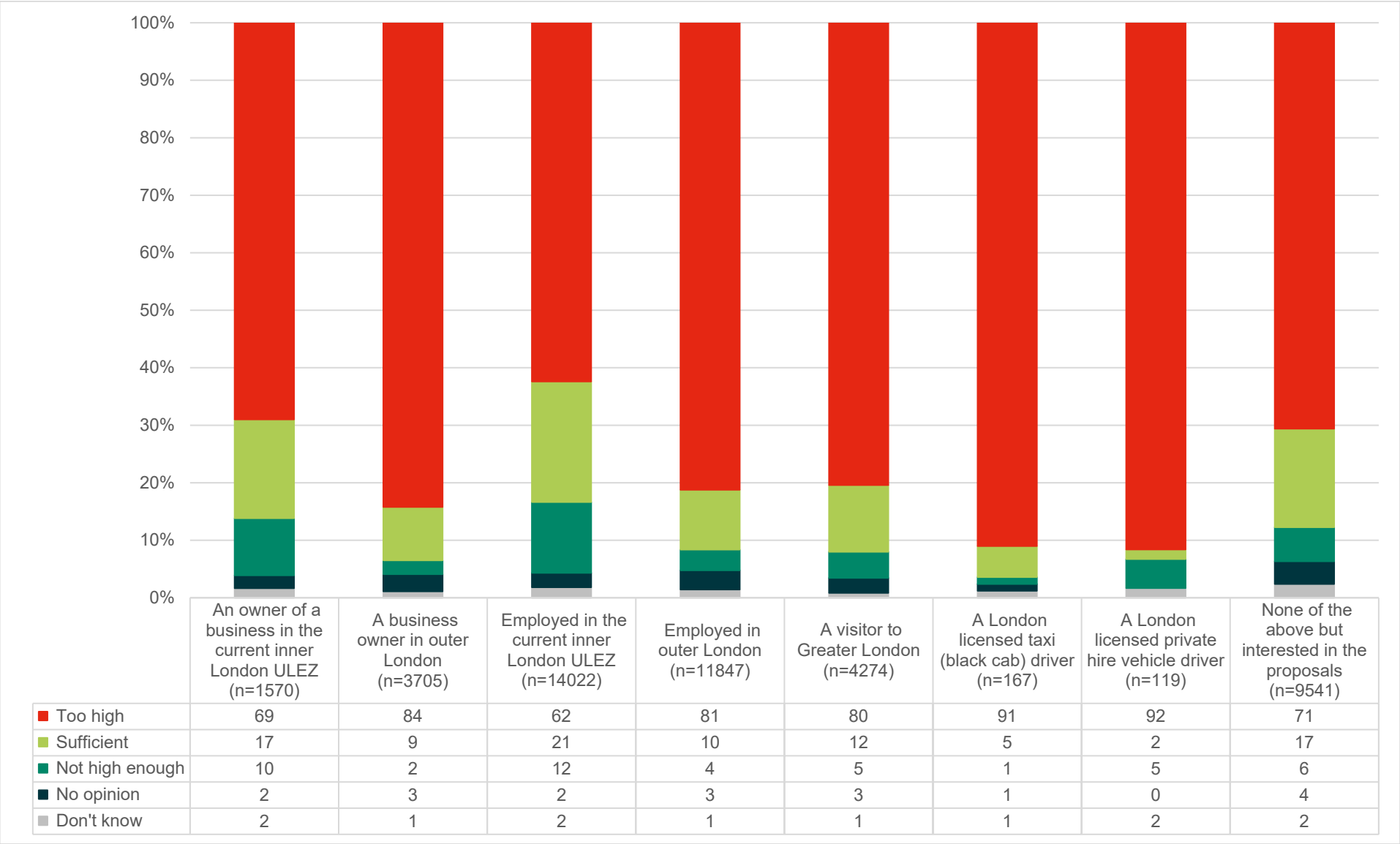
\*Only 119 stakeholders answered this question therefore the percentages should be treated with caution

Of the campaign responses, 4,921 consider the proposed PCN level of £180 sufficient to act as an effective deterrent.

#### Respondent type

All respondent types were more likely to feel the proposed PCN level was too high, ranging from 62 per cent to 92 per cent.

Figure 3.8 What do you consider the proposed PCN level of £180 is?





**Other statistically significant differences between sub-groups:**

- Of those respondents who have vehicles that do not meet the required emissions standards, 85 per cent felt the proposed PCN level was too high, compared to 70 per cent of those whose vehicles did meet the emissions standards and 21 per cent of those who do not own vehicles;
- 90 per cent of those who did not want the proposal implemented at all feel the proposed PCN level will be too high, compared to 10 per cent of those who want the proposal implemented earlier;
- There is a link between the frequency respondents travel in Greater London and if they think the proposed PCN level is sufficient, too low or too high, ranging from those who travel in every day thinking the proposed level is too high (87 per cent) down to those who never travel in (40 per cent);
- Those who consider themselves to be disabled were more likely to think the proposed PCN level is too high (73 per cent) compared to 69 per cent of those who do not consider themselves disabled;
- Those who are aged 46 and over were more likely to think the proposed PCN level was too high (74 per cent) compared to those aged 45 and under (64 per cent); and
- Those respondents who identified as Black, Asian and minority ethnic groups were more likely to think the proposed PCN level was too high (77 per cent) compared to 68 per cent of respondents who identify as White (including White British, Irish, Other).

## 3.8 Automatic Number Plate Recognition (ANPR) Data

### 3.8.1 Concerns about use of respondents' data and ANPR collecting information on vehicle movements

63 per cent of all respondents has some concern about the use of their personal data and the collection of ANPR data compared to 26 per cent who were unconcerned on some level.

**Table 3.12 How concerned are you about use of your data and the installation of more Automatic Number-Plate Recognition (ANPR) cameras to collect information on vehicle movement to enforce an expanded London-wide ULEZ? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Very concerned	46	46	46	31
Concerned	17	17	17	21
No opinion	10	10	10	15
Unconcerned	17	17	17	24
Very unconcerned	9	9	9	7
Don't know	1	1	1	3
Total	41,264	41,146	41,136	118

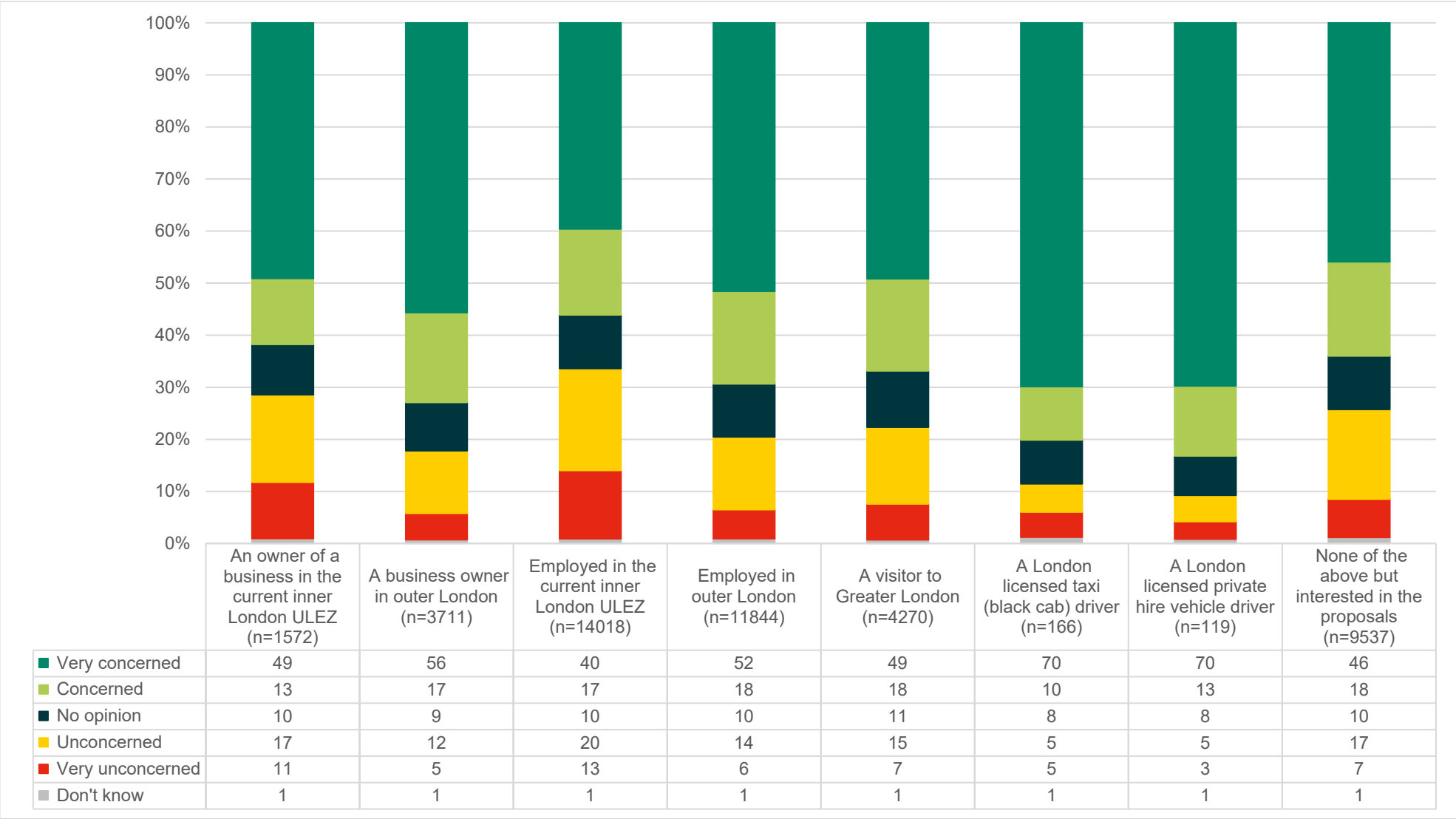
Base: all respondents (41,146 public; 118 stakeholders; 16,649 total did not answer this question)

\*Only 118 stakeholders answered this question therefore the percentages should be treated with caution

## Respondent type

All respondent types were more likely to be concerned on some level about ANPR data, ranging from 56 per cent to 83 per cent. Smaller proportions of each respondent type felt unconcerned on some level (ranging from eight per cent to 33 per cent).

Figure 3.9 How concerned are you about use of your data and the installation of more Automatic Number-Plate Recognition (ANPR) cameras to collect information on vehicle movement to enforce an expanded London-wide ULEZ?



**Other statistically significant differences between sub-groups:**

- 72 per cent of those who have vehicles that do not meet the required emissions standards and 63 per cent of those whose vehicles do meet the emissions standards felt concerned on some level about ANPR data, while 27 per cent of those who meet standards and 17 per cent of those who do not were unconcerned on some level;
- There is a link between the frequency respondents travel in Greater London and concern about ANPR data. Those who travel in every day were more likely to be concerned on some level (75 per cent) compared to those who never travel in (48 per cent);
- Older respondents were the more likely they were to be concerned about ANPR data on some level, with 65 per cent of those aged 66 and above being concerned on some level compared to 50 per cent of those aged 25 or under;
- 67 per cent of those who consider themselves to be disabled were more likely to be concerned on some level compared to 60 per cent of those who do not consider themselves disabled; and
- Those respondents who identified as Black, Asian and minority ethnic groups were more likely to be very concerned about ANPR data (53 per cent) compared to 40 per cent of respondents who identify as White (including White British, Irish, Other).

### 3.9 Auto Pay administration fee

#### 3.9.1 Importance of removing the £10 Auto Pay administration fee per vehicle for ULEZ, LEZ and Congestion Charge

68 per cent of all respondents felt it was important on some level to remove the £10 Auto Pay administration fee, while 11 per cent felt it was unimportant on some level.

**Table 3.13 How important is it that we remove the annual £10 Auto Pay administration fee per vehicle (for the ULEZ, the Low Emission Zone (LEZ), and the Congestion Charge)? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder *
Very important	55	55	55	49
Important	13	13	13	17
No opinion	15	15	15	12
Unimportant	6	6	6	12
Very unimportant	5	5	5	7
Don't Know	6	6	6	4
Total	41,280	41,160	41,091	120

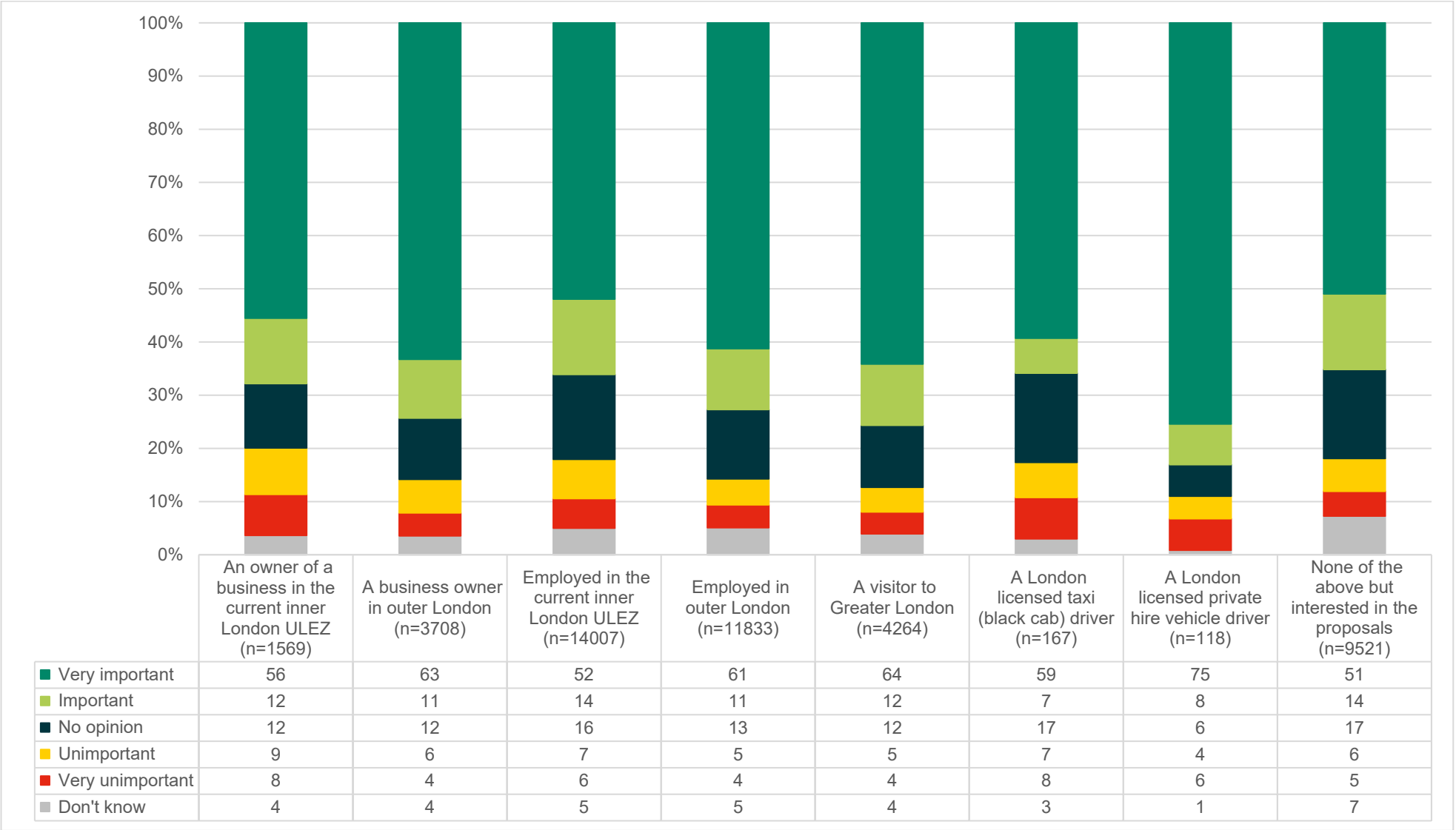
Base: all respondents (41,160 public; 120 stakeholders; 16,633 total did not answer this question)

\*Only 120 stakeholders answered this question therefore the percentages should be treated with caution

#### Respondent type

All respondent types were more likely to think it was important on some level to remove the Auto Pay fee, ranging from 65 per cent to 83 per cent.

**Figure 3.10 How important is it that we remove the annual £10 Auto Pay administration fee per vehicle (for the ULEZ, the Low Emission Zone (LEZ), and the Congestion Charge)?**



**Other statistically significant differences between sub-groups:**

- Those who own vehicles that do not meet the required emissions standards (73 per cent) and those who have vehicles that do meet emission standards (72 per cent) felt it was important on some level to remove the auto pay administration fee; and
- There is a link between the frequency respondents travel in Greater London and how important they feel it is to remove the Auto Pay. Those who travel in every day were more likely to feel it was very important (65 per cent) down to those who never travel in (39 per cent).

### 3.10 Themes from comments about proposed expansion of the ULEZ and the day-to-day administration of Road User Charging schemes

This section shows the main themes that were mentioned in the comments provided about the ULEZ from all respondents. The full list of themes of comments about the ULEZ are provided in **Appendix C**.

#### 3.10.1 Operation of the ULEZ

The following tables show the number of times respondents, including stakeholders, commented on the implementation date and the operation of the ULEZ. The main themes in the comments are shown in Table 3.14 and Table 3.15 below.

**Table 3.14 Comments about the implementation date**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Proposed ULEZ expansion should be delayed (i.e. implemented later than 29th August 2023)	3,257	3,196	3,194	61
Proposed ULEZ expansion should be implemented sooner (i.e. sooner than 29th August 2023)	537	525	490	12
Other comments about implementation date of ULEZ expansion	168	166	166	2
Total number who commented on this topic	3,902	3,829	3,792	73

**Table 3.15 Comments about the operation of ULEZ**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Other comments about the operation of the ULEZ	659	630	629	29
Concerns that the required standards to be compliant are too high / should be lower	595	593	593	2
ULEZ Charge should be lower (i.e. lower than £12.50 per day)	589	588	587	1
Concerns / comments about the time the ULEZ is in effect (i.e. 24/7, midnight to midnight)	237	234	234	3
ULEZ Charge should be higher (i.e. higher than £12.50 per day)	88	88	88	0
Total number who commented on this topic	2,018	1,984	1,982	34

### 3.10.2 The social and financial impact

The following table shows the number of times respondents, including stakeholders, commented about social and financial impacts. The main themes in the comments are shown in Table 3.16 and Table 3.17.

**Table 3.16 Comments about social impact**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Does not consider the current cost of living crisis / financial crunch / bad timing / impacts from Covid-19	10,293	10,173	10,171	120
Will have detrimental impacts on people's lives	9,100	9,023	4,295	77
Public transport provisions are poor / not a viable alternative / safety concerns with using public transport (e.g. using at night)	6,923	6,825	6,818	98
Having and using a car is a necessity because of needs / cannot use other transport modes (e.g. public transport or active travel)	6,223	6,131	6,129	92
Will negatively impact on social / leisure activities / visiting friends, family/concerns about social isolation	4,207	4,149	4,146	58
Will push people into / towards poverty	2,318	2,309	2,309	9
Will negatively impact those living outside Greater London	1,920	1,868	1,868	52
Will have negative impacts on mental health	1,017	1,006	1,005	11
Other comments about social impacts	140	130	130	10
Total number who commented on this topic	25,237	25,034	20,296	204



**Table 3.17 Comments about financial impact**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Cannot afford daily charge / to upgrade to a compliant vehicle / compliant vehicles are expensive / concerns about current vehicles being devalued	13,300	13,192	13,189	108
Will have detrimental impacts on London / London's economy / businesses	7,799	7,716	2,989	83
Will increase the cost of living (general comments)	7,778	7,736	3,007	42
Penalises people travelling for/to/from work	3,496	3,431	3,426	65
Funding / financial support should be provided to support the upgrading / replacing of vehicles to be compliant	1,789	1,739	1,736	50
Will force people out of employment / to change employment	1,728	1,707	1,705	21
Will have detrimental impacts on small businesses	1,417	1,367	1,367	50
Residents will relocate outside of London to avoid paying the charge	1,292	1,286	1,286	6
Will have a detrimental impact on my business/livelihood	817	801	801	16
ULEZ costs will be/are being passed onto residents/customers from businesses/services	635	622	620	13
Penalises tradespeople	632	618	616	14
Penalises key workers	597	562	561	35
Businesses will relocate outside of London to avoid paying the charge	273	267	267	6
Other comments about financial impacts	244	235	234	9
Total number who commented on this topic	24,627	24,422	19,684	205

### 3.10.3 Discounts and exemptions

The following table shows the number of times respondents, including stakeholders, commented about discounts and exemptions. The main themes in the comments are shown in Table 3.18 below.

**Table 3.18 Comments about discounts and exemptions**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Support discounts / exemptions	5,238	5,216	200	22
Should be discounts / exemptions for disabled people (those without disabled class vehicles)	5,054	5,037	309	17
People who live in the ULEZ should not have to pay the charge / should be exempt	825	819	818	6
Other named groups / vehicles should receive exemptions / discounts	693	668	667	25
Should be discounts / exemptions for classic / historical vehicles	489	481	480	8
Other comments	351	333	332	18
NHS / key workers should receive discounts / exemptions	319	303	303	16
Should be discounts / exemptions for elderly / vulnerable people	224	220	220	4
Should be discounts / exemptions for those on low incomes / financially struggling / charging should take household income into account (e.g. means testing)	211	201	201	10
Oppose discounts / exemptions	161	160	159	1
Total number who commented on this topic	13,818	13,695	3,946	123

### 3.10.4 The scrappage scheme

The following table shows the number of times respondents, including stakeholders, commented about the scrappage scheme. The main themes in the comments are shown in Table 3.19 below.

**Table 3.19 Comments about Scrappage scheme**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Scrapping vehicles is bad for the environment / scrapping perfectly good vehicles is counterproductive	2,864	2,852	2,851	12
Scrappage scheme will not provide enough money to subsidise replacing a vehicle / should be provided with money for scrapping to upgrade / change to a compliant vehicle	2,041	2,000	2,000	41
Unfair that will need to upgrade again after only upgrading recently but still being classed as non-compliant (e.g. previously upgraded due to government incentives but still non-compliant)	1,990	1,989	1,987	1
Eligibility for the scrappage scheme is unfair	1,332	1,278	1,278	54
Support scrappage scheme	486	439	439	47
Do not support scrappage scheme	432	432	431	1
Should not encourage car purchases / should encourage movement away from cars	407	397	385	10
Other comments about scrappage scheme	336	301	301	35
Suggest providing incentives to use sustainable transport / active travel as part of scrappage scheme or instead of a scrappage scheme	150	113	111	37
Total number who commented on this topic	7,948	7,812	7,798	136

### 3.10.5 The Penalty Charge Notice

The following table shows the number of times respondents, including stakeholders, commented about the PCN. The main themes in the comments are shown in Table 3.20 below.

**Table 3.20 Comments about PCN**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Oppose proposed PCN increase (i.e. £180 rather than £160) / should be lower	625	617	617	8
Other comments about the PCN	225	218	217	7
The PCN should be means tested / dependent on income	153	151	151	2
Support proposed PCN increase (i.e. £180 rather than £160) / should be higher	78	67	67	11
Total number who commented on this topic	1,007	981	980	26

### 3.10.6 Automatic Number Plate Recognition (ANPR)

The following table shows the number of times respondents, including stakeholders, commented about respondent's data and ANPR collecting information on vehicle movements. The main themes in the comments are shown in Table 3.21 below.

**Table 3.21 Comments about ANPR**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Concerns about data collection by ANPR (e.g. data privacy and personal data being collected and used)	5,109	5,103	377	6
Concerns about the enforcement of the ULEZ using ANPR / concerns about loopholes and ways to avoid the charge	105	105	105	0
No concerns about data collection by ANPR	34	28	28	6
Other comments about data collection by ANPR	33	29	29	4
Total number who commented on this topic	5,253	5,239	513	14

### 3.10.7 Auto Pay

The following table shows the number of times respondents, including stakeholders, commented about Auto Pay. The main themes in the comments are shown in Table 3.22 below.

**Table 3.22 Comments about Auto Pay**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Support the removal of the Auto Pay administration fee	337	309	309	28
Oppose the removal of the Auto Pay administration fee	60	59	58	1
Other comments about the Auto Pay administration fee	51	45	45	6
Total number who commented on this topic	432	400	399	32

### 3.10.8 Other general comments received about ULEZ

Other general comments showing general support or opposition that could not be applied to more specific themes, were categorised in the general themes which are shown in Table 3.23 and Table 3.24 below.

**Table 3.23 Comments in support of the ULEZ expansion**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Support the expansion of the ULEZ	3,876	3,783	1,574	93
Support / recognise a need for action to address / improve congestion / air quality / climate emergency	2,854	2,740	1,676	114
Support the ULEZ but feel that the proposed boundary should differ (e.g. which areas should and should not be included)	797	782	765	15
More needs to be done to achieve the aims / proposals need to go further (e.g. required standards to be compliant should be higher, should charge all vehicles)	868	825	765	43
Other general comments showing support	49	45	42	4
Total number who commented on this topic	6,527	6,373	4,038	154

**Table 3.24 Comments in opposition of the ULEZ expansion**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Proposed changes just another tax/money-making scheme/money raised is not used to improve infrastructure	16,997	16,945	12,218	52
Oppose/disagree with the expansion of the ULEZ	15,515	15,470	10,738	45
Stop targeting/penalising motorists	2,722	2,711	2,709	11
ULEZ expansion is not necessary to address congestion/air quality/climate emergency/they are not issues	2,636	2,611	2,610	25
Other traffic measures cause congestion/not volume of traffic (e.g. traffic lights, LTNs, cycle lanes etc)	2,326	2,317	2,313	9
Concerns/doubts that the motives of the ULEZ expansion are to achieve the stated aims	2,129	2,116	2,116	13
Oppose the expansion of the ULEZ but agree congestion/air quality/climate emergency needs addressing	1,303	1,262	1,261	41
Oppose/disagree with the existing ULEZ in general/should be abolished	1,213	1,210	1,210	2
Waste of resources/money/time	771	765	765	6
Concerns about the cost of implementation/enforcement of ULEZ (e.g. that the cost will be too high)	614	593	593	21
Other opposing general comments	404	396	396	8
Total number who commented on this topic	27,282	27,155	22,417	127

### 3.10.9 The wider impacts associated with the ULEZ expansion

Respondents provided additional comments on the wider impacts associated with the ULEZ expansion, the main comment noted that the ULEZ expansion will have no impact to air quality, health or wellbeing of Londoners. Table 3.25 shows the number of times respondents, including stakeholders, commented about each theme.

**Table 3.25: Comments about the wider impacts of the ULEZ expansion**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
ULEZ expansion will have no impact to air quality / health and wellbeing	2,015	1,981	1,978	34
ULEZ expansion will have a positive impact on air quality / health and wellbeing / will improve it	1,037	999	184	38
ULEZ expansion will have no impact to congestion	700	689	689	11
Concerns that the ULEZ will push congestion and pollution outside of the zone / make surrounding areas worse	710	680	676	30
ULEZ expansion will have a positive impact on climate emergency / impact to the environment	671	649	35	22
ULEZ expansion will have a positive impact on congestion/will reduce it	659	645	42	14
ULEZ expansion will have no impact on climate emergency / impact to the environment	487	468	467	19
ULEZ expansion will make air quality / pollution / health and wellbeing worse	322	320	318	2
ULEZ expansion will cause more congestion/increase it	279	277	275	2
ULEZ expansion will encourage more sustainable transport use	156	150	65	6
ULEZ expansion will make climate emergency / impact to the environment worse	82	80	80	2
Total number who commented on this topic	4,861	4,757	3,852	104

### 3.10.10 Mitigations and suggestions for the ULEZ expansion

Respondents provided additional comments on the ULEZ expansion, the main comment received was the need to invest and improve public transport. The main comments are shown in Table 3.26 with all comments provided in Appendix C.

**Table 3.26 Comments about mitigation and suggestions for the ULEZ expansion**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Need to invest/improve public transport (e.g. more frequent, availability and accessibility in areas etc)	2,921	2,840	2,822	81
Need to encourage/incentivise more use of public transport (e.g. should make it cheaper)	1,963	1,980	1,893	55
Other mitigation comments and/or policy suggestions	1,961	1,902	1,892	59
Need to target other sources of air pollution (e.g. airports, new developments, wood burners)	1,859	1,837	1,833	22
Need to improve public transport in outer London	1,036	976	975	60
Needs to be more encouragement/investment in other transport schemes to improve air quality/congestion/environment	892	874	863	18
Suggest improving cycling infrastructure	850	809	771	41
Needs to be more encouragement/investment in other schemes/areas not specifically related to transport	756	753	753	3
Need to encourage/incentivise more use/switching to electric vehicles	750	725	721	25
Need to encourage/incentivise more use of active travel (walking, cycling, walking)	503	464	411	39
Total number who commented on this topic	10,964	10,787	10,635	177



## 4. Key findings: Addressing the triple challenges affecting London

Respondents were asked about the triple challenges affecting London, namely, improving air quality, tackling the climate emergency and reducing traffic congestion.

### 4.1 Importance of addressing the triple challenge affecting London

Respondents were asked about the importance of each of the challenges affecting London and in addition, the importance of taking further steps to improve the health of Londoners and address health inequality. All respondents were able to respond to the questions and their answers are shown in Table 4.1 to Table 4.4.

A total of 63 per cent of responses felt there was some level of importance that air pollution in London is tackled as seen in Table 4.1.

**Table 4.1: How important is it to you that we take further steps to tackle air pollution in London? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Very important	37	37	27	42
Important	26	26	30	28
No opinion	11	11	13	11
Unimportant	14	14	16	9
Very unimportant	10	11	12	8
Don't know	1	1	1	2
Total	47,550	47,434	40,849	116

Base: all respondents (47,434 public; 116 stakeholders; 10,363 total did not answer this question)

\*Only 116 stakeholders answered this question therefore the percentages should be treated with caution

Of the campaign responses, 6,585 felt it was important on some level to take further steps to tackle air pollution in London.

A total of 61 per cent of responses felt there was some level of importance to tackling the climate emergency by reducing emissions in London as seen in Table 4.2.

**Table 4.2: How important is it to you that we take further steps to tackle the climate emergency by reducing emissions in London? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Very important	37	37	27	44
Important	23	24	27	21
No opinion	11	11	13	12
Unimportant	15	15	17	15
Very unimportant	13	13	15	7
Don't know	1	1	1	2
Total	47,454	47,337	40,760	117

Base: all respondents (47,337 public; 176 stakeholders; 10,459 total did not answer this question)

\*Only 117 stakeholders answered this question therefore the percentages should be treated with caution

Of the campaign responses, 6,577 felt it was important on some level to take further steps to tackle the climate emergency by reducing emissions in London.

A total of 61 per cent of responses felt there was some level of importance to tackling traffic congestion in London as seen in Table 4.3.

**Table 4.3: How important is it to you that we take further steps to tackle traffic congestion in London? (%)**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Very important	36	36	26	43
Important	25	25	29	28
No opinion	13	13	15	13
Unimportant	16	15	18	11
Very unimportant	9	9	11	3
Don't know	1	1	1	2
Total	47,473	47,358	40,779	115

Base: all respondents (47,358 public; 115 stakeholders; 10,440 total did not answer this question)

\*Only 115 stakeholders answered this question therefore the percentages should be treated with caution

Of the campaign responses, 6,579 felt it was important on some level to take further steps to tackle traffic congestion in London.

A total of 66 per cent of responses felt there was some level of importance to improving the health of Londoners as seen in Table 4.4.

**Table 4.4: How important is it to you that we take further steps to improve the health of Londoners? (%)**

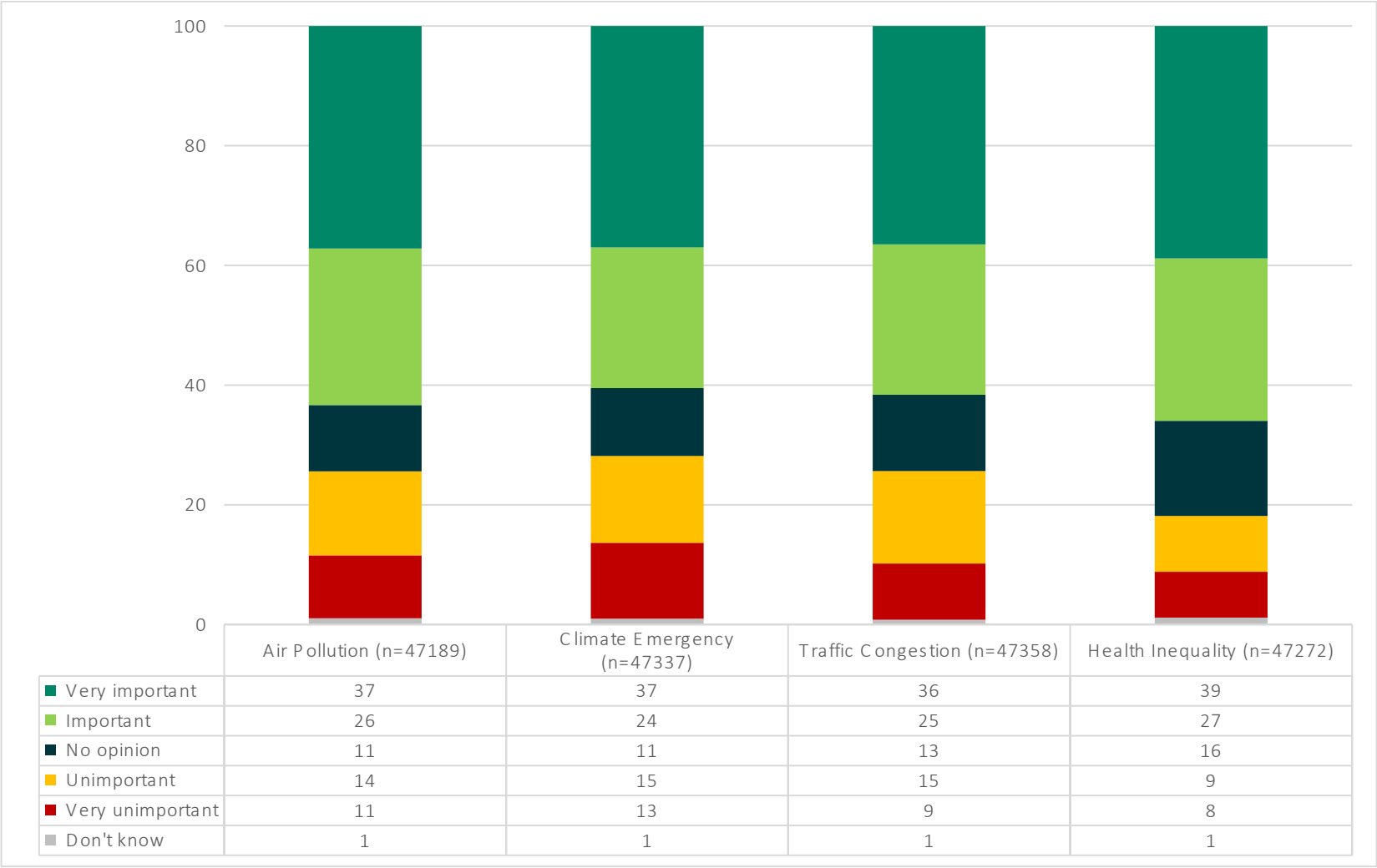
	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Very important	39	39	29	42
Important	27	27	32	32
No opinion	16	16	18	15
Unimportant	9	9	11	5
Very unimportant	8	8	9	3
Don't know	1	1	1	3
Total	47,385	47,269	40,698	116

Base: all respondents (47,269 public; 116 stakeholders; 10,525 total did not answer this question)

\*Only 116 stakeholders answered this question therefore the percentages should be treated with caution

Of the campaign responses, 6,574 felt it was important on some level to take further steps to improve the health of Londoners.

Figure 4.1: How important is it to address the challenges affecting London? (%)



### 4.1.1 Statistically significant findings

There is a link between the number of days a respondent drives in London and the level of importance they put on taking steps to address the challenges to London as shown in Table 4.5. The more often a respondent drives in Greater London, the less importance they give to addressing each challenge to London.

**Table 4.5 Respondents who feel it is very important / important to address each challenge to London and frequency of driving in London (%)**

	Never	Less than once a month	1-3 times a month	1-2 days a week	3-4 days a week	5-6 days a week	Every day	Base
Tackle air pollution	76	69	67	66	57	51	41	47,434
Tackle the climate emergency	74	67	63	63	53	47	37	47,337
Tackle traffic congestion	72	66	65	63	55	50	42	47,358
Improving the health of Londoners and address health inequality	78	71	69	67	60	54	46	47,272

There is a similar link between those who believe the timings for implementing the ULEZ should be earlier, is right, should be later or should not be implemented at all and whether they feel taking steps to address the challenges to London are very important as shown in Table 4.6. The earlier a respondent would like to see the ULEZ implemented, the more likely they are to feel each challenge is very important.

**Table 4.6 Respondents who feel it is very important to address each challenge to London and views about the implementation date for the ULEZ (%)**

	Should be earlier	It is the right date	Should be later	Should not be implemented at all	Base
Tackle air pollution	94	93	23	7	47,434
Tackle the climate emergency	92	92	25	7	47,337
Tackle traffic congestion	76	87	22	12	47,358
Improving the health of Londoners and address health inequality	90	92	27	10	47,272

#### Other statistically significant differences between sub-groups: Tackling air quality

- Respondents living in the current inner London ULEZ were more likely to say it was very important to tackle air quality, with 72 per cent compared to 25 per cent of respondents living in outer London; and
- Younger respondents (aged 45 and under) had a stronger feeling of importance regarding tackling air quality in London, with 41 per cent of respondents aged 25 and under stating

it was very important, and 36 per cent aged between 26 and 45. Compared to 23 per cent of respondents aged between 46 to 65 and 24 per cent aged 66 and above.

### **Other statistically significant differences between sub-groups: Tackling the climate emergency**

- Respondents living in the current inner London ULEZ were more likely to say it was very important to tackle the climate emergency by reducing emissions, with 72 per cent compared to 25 per cent of respondents living in outer London; and
- Younger respondents (aged 45 and under) had a stronger feeling of importance regarding tackling the climate emergency, with 42 per cent of respondents aged 25 and under stating it was very important, compared to 35 per cent aged between 26 and 45, 23 per cent aged between 46 and 65 and 23 per cent aged 66 and above.

### **Other statistically significant differences between sub-groups: Traffic congestion**

- Respondents living in the current inner London ULEZ were more likely to say it was very important to tackle traffic congestion, with 68 per cent compared to 25 per cent of respondents living in outer London; and
- Younger respondents (aged 45 and under) had a stronger feeling of importance regarding improving traffic congestion in London, with 35 per cent of respondents aged 25 and under stating it was very important, compared to 31 per cent aged between 26 and 45, 23 per cent aged between 46 and 65 and 25 per cent aged 66 and above.

### **Other statistically significant differences between sub-groups: Improving the health of Londoners and addressing health inequality in London**

- Respondents living in the current inner London ULEZ were more likely to say it was very important to tackle traffic congestion, with 73 per cent compared to 27 per cent of respondents living in outer London; and
- Younger respondents (aged 45 and under) had a stronger feeling of importance regarding improving health inequality in London, with 44 per cent of respondents aged 25 and under stating it was very important, and 38 per cent aged between 26 and 45. Compared to 25 per cent of respondents aged between 46 to 65 and 26 per cent aged 66 and above.

## 5. Key findings: The future of road user charging

### 5.1 Level of importance for a new scheme to address identified challenges

Respondents were asked about the considerations that should be made to develop a future road user charging scheme to replace the existing schemes and how important it would be for the new scheme to address eight challenges; these challenges are listed below together with the level of importance in section 5.1.1.

#### 5.1.1 Overall Summary

All eight challenges were considered to be important by at least 50 per cent of respondents. The top three challenges which respondents felt would be important to address are:

- Making roads safer for everyone (76 per cent);
- Improve bus journey times and reliability (71 per cent); and
- Improve health and wellbeing (65 per cent).

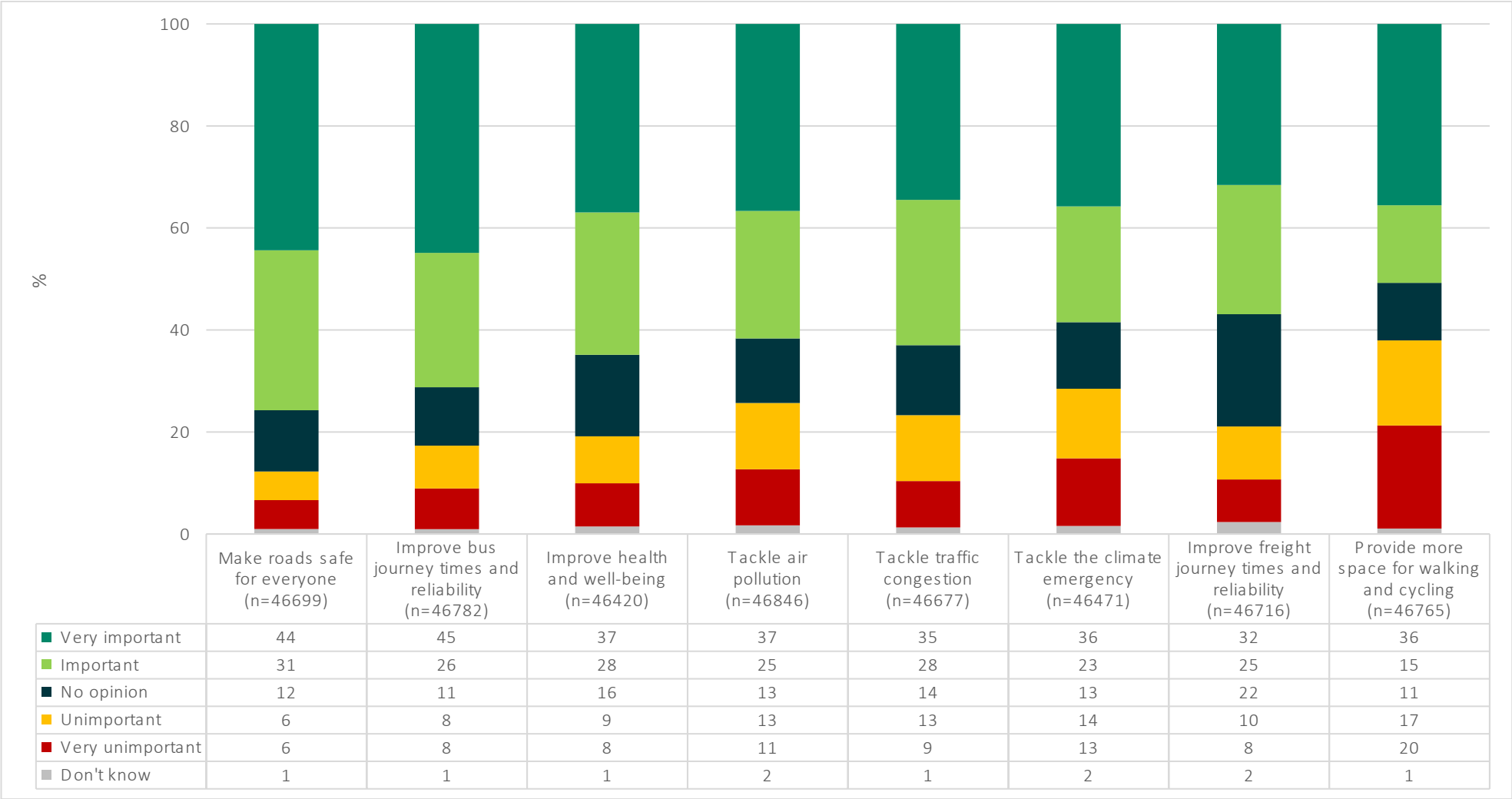
Table 5.1 shows the level of importance for each of the eight challenges, this table only shows responses provided by the public.

**Table 5.1: Level of importance for each challenge - public only (%)**

	Base	Important	No opinion	Unimportant
Tackle air pollution	46,846	62	13	24
Tackle the climate emergency by reducing emissions	46,471	58	13	27
Tackle traffic congestion	46,677	63	14	22
Improve health and wellbeing	46,420	65	16	18
Provide more space for walking and cycling	46,765	51	11	37
Improve bus journey times and reliability	46,782	71	11	16
Improve journey times and reliability for freight and servicing trips	46,716	57	22	19
Make roads safer for everyone	46,699	76	12	11

Campaign respondents' responses are included in Table 5.1.

Figure 5.1: Level of importance for a new scheme to address key challenges (%)



Campaign respondents' responses are included in Figure 5.1.



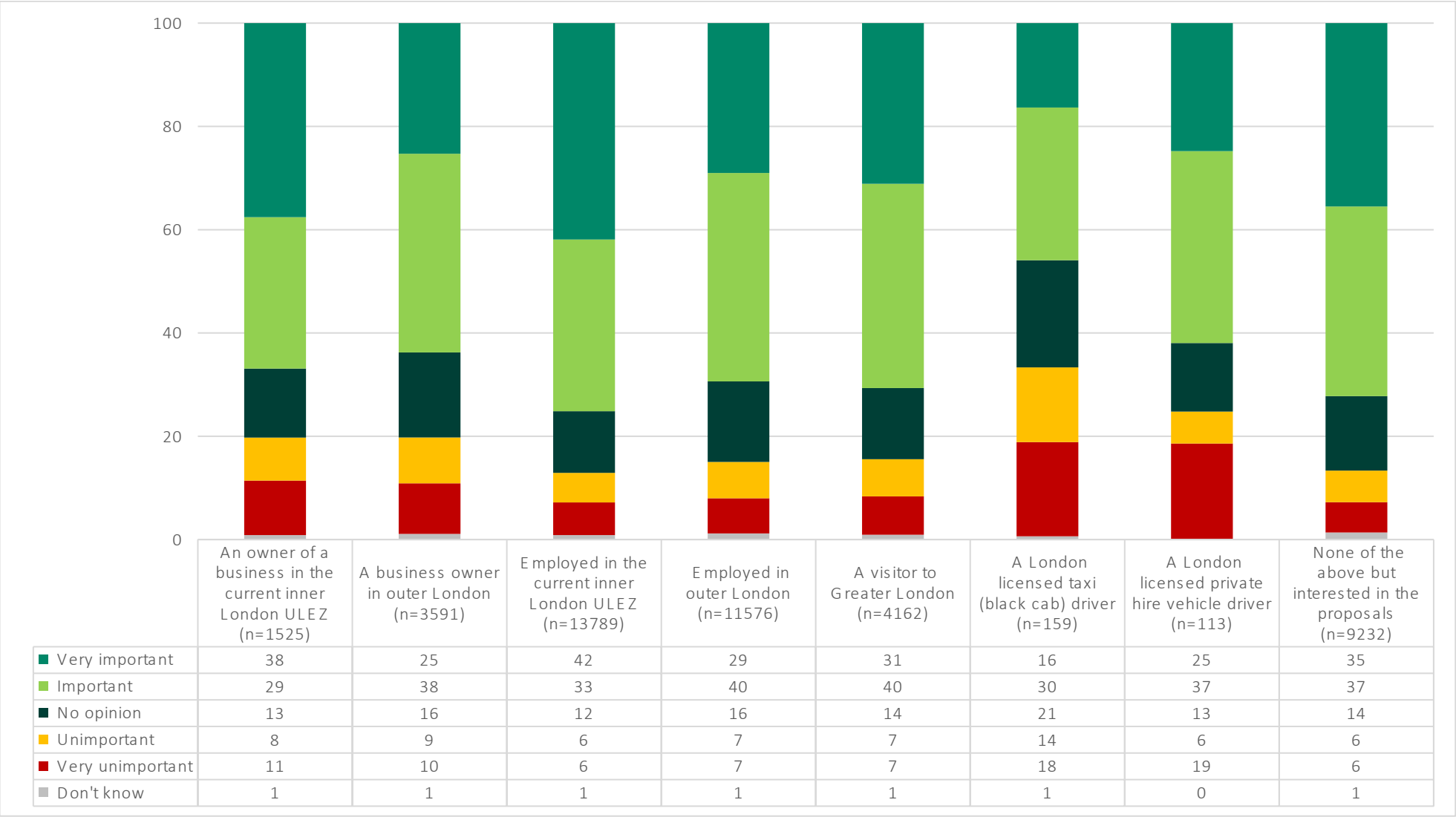
The following sections provide a summary of each of the challenges by order of importance.

### **Make roads safer for everyone**

Business owners and those employed in the current inner London ULEZ were more likely to say it was very important to make roads safer for everyone, with 38 per cent and 42 per cent respectively. Compared with 8 per cent and 6 per cent saying it was very unimportant respectively.

London taxi and private hire vehicle drivers had the highest proportion of different types of respondents to say it was very unimportant to make roads safer for everyone, with 18 per cent and 19 per cent respectively.

Figure 5.2: Level of importance for a new scheme to make roads safer for everyone (%)



### **Other statistically significant differences between sub-groups:**

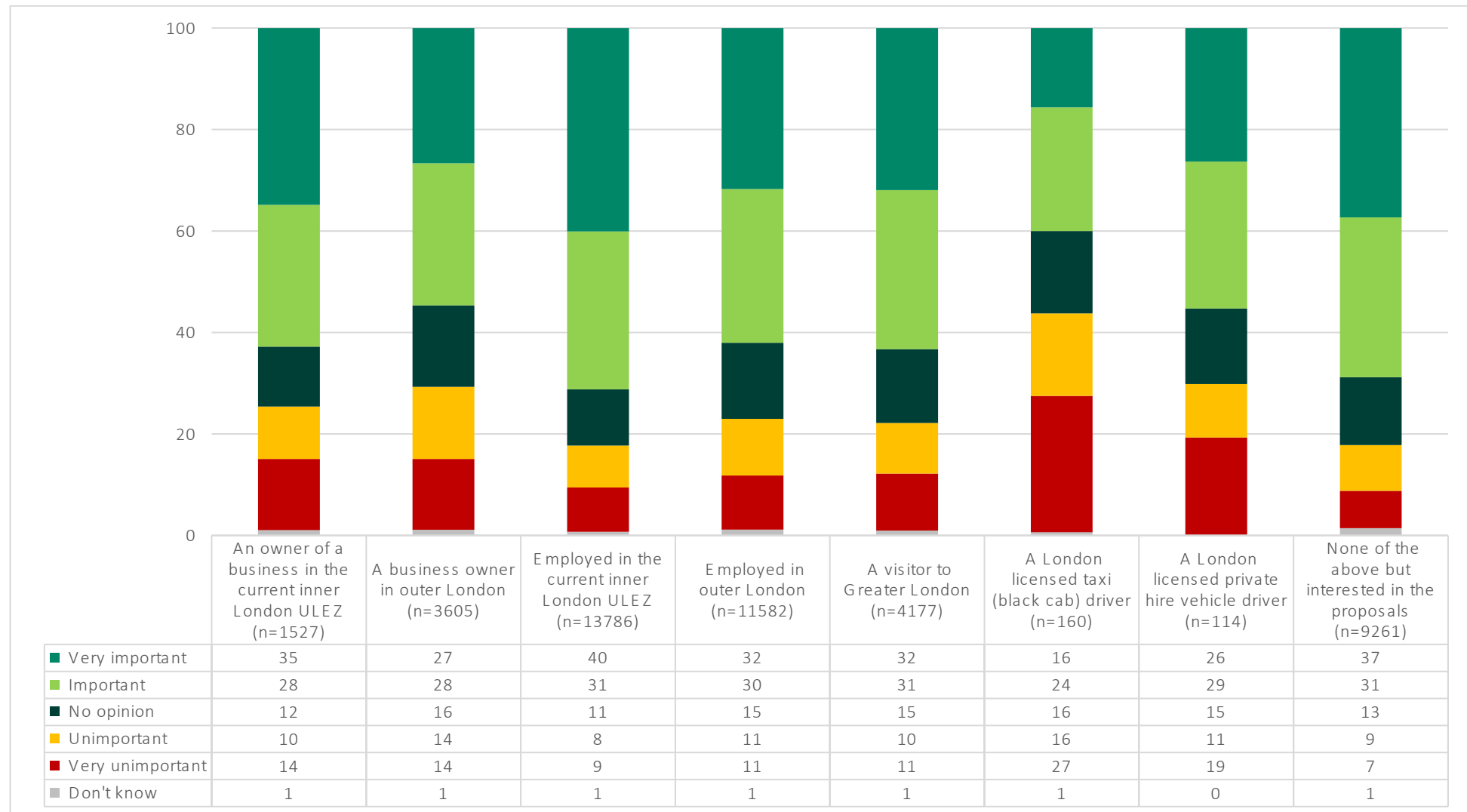
- There was a link between frequency of driving and how important respondents viewed the importance of safer roads for everyone in London, this ranged from those who never drive with 61 per cent who felt it was very important, down to 23 per cent of those who stated that they drove every day;
- Those who stated that they do not own a vehicle were more likely to say that it was very important to make roads safer for everyone (70 per cent) compared to those who own a vehicle which did or did not meet the emissions standards for the ULEZ (38 per cent and 25 per cent respectively); and
- Younger respondents (aged 25 and under) had a stronger feeling of importance regarding making road safer for everyone, with 44 per cent saying it was very important compared to 35 per cent of those aged 66 and above.

### **Improve bus journey times and reliability**

Respondents employed in the current inner London ULEZ were more likely to say there was some level of importance to improve bus journey times and reliability, with 71 per cent compared to 16 per cent who felt it was unimportant at some level.

27 per cent of London taxi drivers felt it was very unimportant to improve bus journey times and reliability.

**Figure 5.3: Level of importance for a new scheme to improve bus journey times and reliability (%)**



### **Other statistically significant differences between sub-groups:**

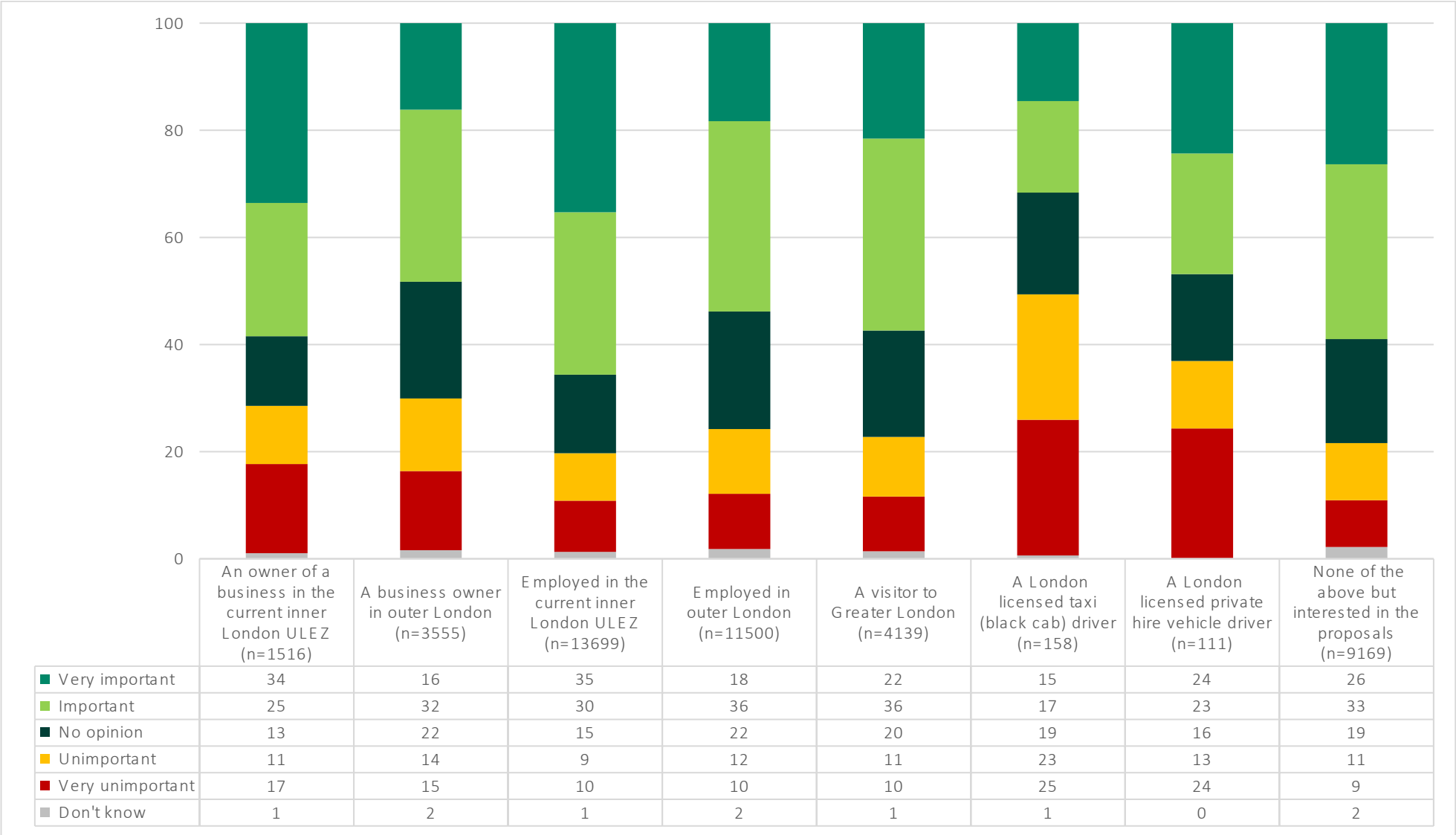
- There was a link between frequency of driving and how important respondents viewed the importance of improving bus journey times and reliability in London. Of those who stated that they never drive, 59 per cent felt it was very important compared with 26 per cent of those who stated that they drove every day;
- Those who stated that they do not own a vehicle were more likely to say that it was very important to improve bus journey times and reliability (63 per cent) compared to those who own a vehicle which did meet the emissions standards for the ULEZ (38 per cent) or did not meet the emissions standards (28 per cent); and
- Younger respondents (aged 25 and under) had a stronger feeling of importance regarding improving bus journey times and reliability, with 44 per cent saying it was very important.

### **Improve health and wellbeing**

Those who are employed in the current inner London ULEZ (35 per cent) and business owners in the current inner London ULEZ (34 per cent) were more likely to feel that improving health and wellbeing in London was very important compared to other respondents (26 per cent or less).

London taxi drivers (25 per cent) and private hire drivers (24 per cent) were more likely to say it was very unimportant to improve health and wellbeing than other respondents.

Figure 5.4: Level of importance for a new scheme to improve health and wellbeing (%)



### **Other statistically significant differences between sub-groups:**

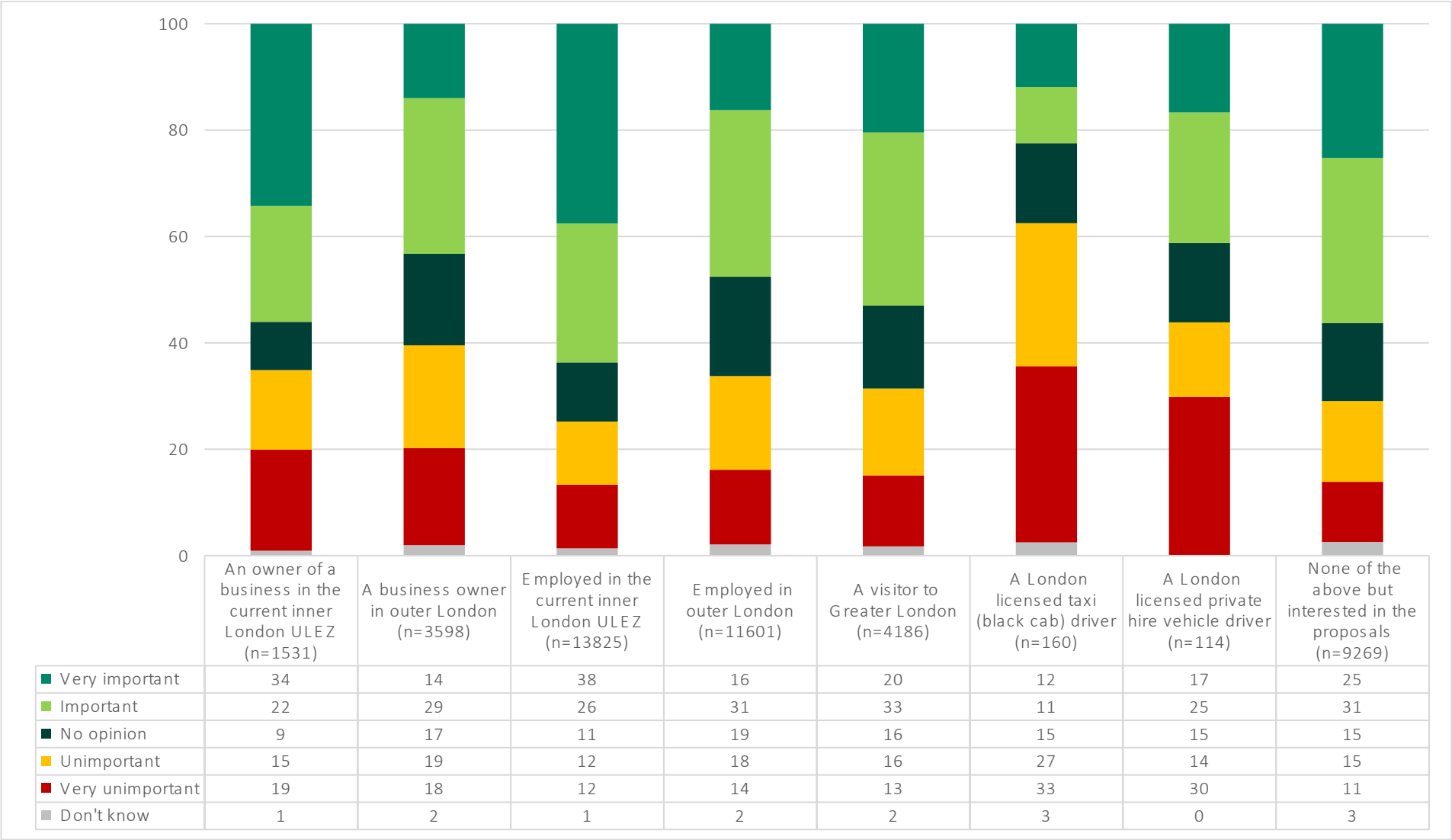
- There was a link between frequency of driving and how important respondents viewed the importance of improving health and wellbeing in London. Of those who stated that they never drive, 56 per cent felt it was very important compared with 13 per cent of those who stated that they drove every day;
- Those who stated that they do not own a vehicle were more likely to say that it was very important to improve health and wellbeing (69 per cent) compared to those who own a vehicle which did meet the emissions standards for the ULEZ (30 per cent) or did not meet the emissions standards (14 per cent); and
- Younger respondents (aged 25 and under) felt it was very important to improve health and wellbeing, with 39 per cent saying it was very important compared to 23 per cent of those aged 46 to 65 and 26 per cent of those aged 66 and above.

### **Tackle air pollution**

Business owners and respondents employed in the current inner London ULEZ were more likely to feel it was very important to tackle air pollution than other types of respondents, 34 per cent and 38 per cent respectively compared to business owners and respondents employed in outer London (14 per cent and 16 per cent respectively).

Taxi and private hire drivers were more likely to feel it was very unimportant to tackle air pollution (33 per cent and 30 per cent respectively) than all other types of respondents.

Figure 5.5: Level of importance for a new scheme to tackle air pollution (%)





### **Other statistically significant differences between sub-groups:**

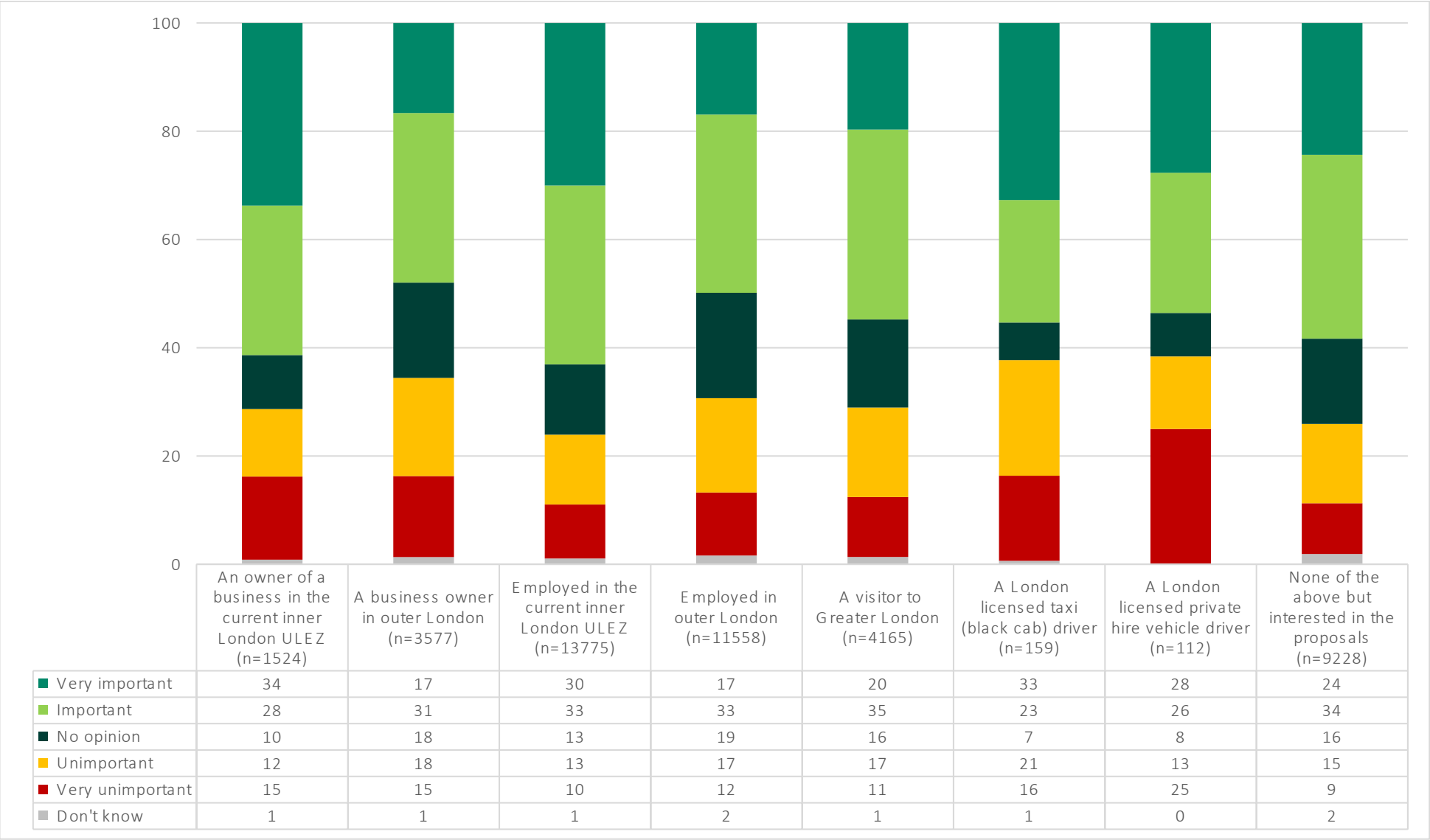
- There was a link between frequency of driving and how important respondents viewed the importance of tackling air pollution in London. Of those who stated that they never drive, 58 per cent felt it was very important compared with 10 per cent of those who stated that they drove every day
- Those who stated that they do not own a vehicle were more likely to say that it was very important to tackle air pollution (76 per cent) compared to those who own a vehicle which meets the emissions standards for the ULEZ (30 per cent) or does not meet the emissions standards (12 per cent); and
- Younger respondents (aged 25 and under) had a stronger feeling of importance regarding tackling air pollution, with 38 per cent saying it was very important compared 23 per cent of those aged 46 to 65 and those 66 and above (24 per cent).

### **Tackle traffic congestion**

Business owners and those employed in the current inner London ULEZ were more likely to say that it was very important to tackle traffic congestion, (34 per cent and 30 per cent respectively) compared to business owners and employees in outer London (17 per cent for each).

Taxi and private hire vehicle drivers had a mixed view, with 55 per cent and 54 per cent feeling there was a level of importance to tackle traffic congestion and 37 per cent and 38 per cent feeling there was some level of it being unimportant respectively.

Figure 5.6: Level of importance for a new scheme to tackle the traffic congestion (%)



### **Other statistically significant differences between sub-groups:**

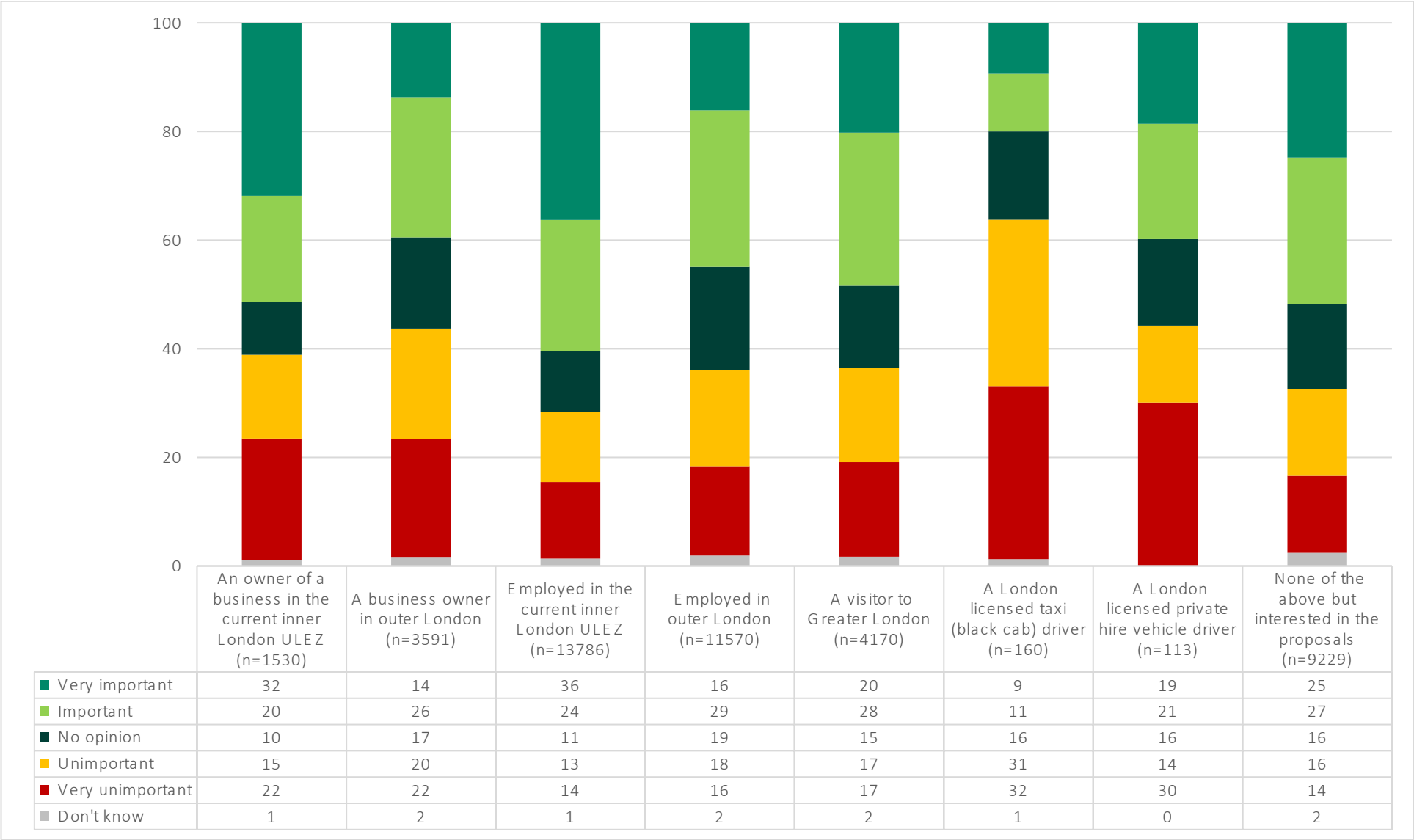
- There was a link between frequency of driving and how important respondents viewed the importance of tackling traffic congestion in London. Of those who stated that they never drive, 49 per cent felt it was very important compared with 15 per cent of those who stated that they drove every day; and
- Those who stated that they do not own a vehicle were more likely to say that it was very important to tackle traffic congestion (53 per cent) compared to those who own a vehicle which did meet the emissions standards for the ULEZ (27 per cent) or did not meet the emissions standards (14 per cent).

### **Tackle climate emergency**

There were 51 per cent of business owner respondents and 60 per cent of respondents employed in the current inner London ULEZ who felt tackling the climate emergency by reducing emissions in London had some level of importance.

Taxi drivers were more likely to say that it was unimportant to tackle the climate emergency by reducing emissions in London with 63 per cent stating it was unimportant at some level. Other types of respondents who had a higher proportion feeling tackling the climate emergency was unimportant than important were business owners in outer London and private hire vehicle drivers.

Figure 5.7: Level of importance for a new scheme to tackle the climate emergency by reducing emissions (%)



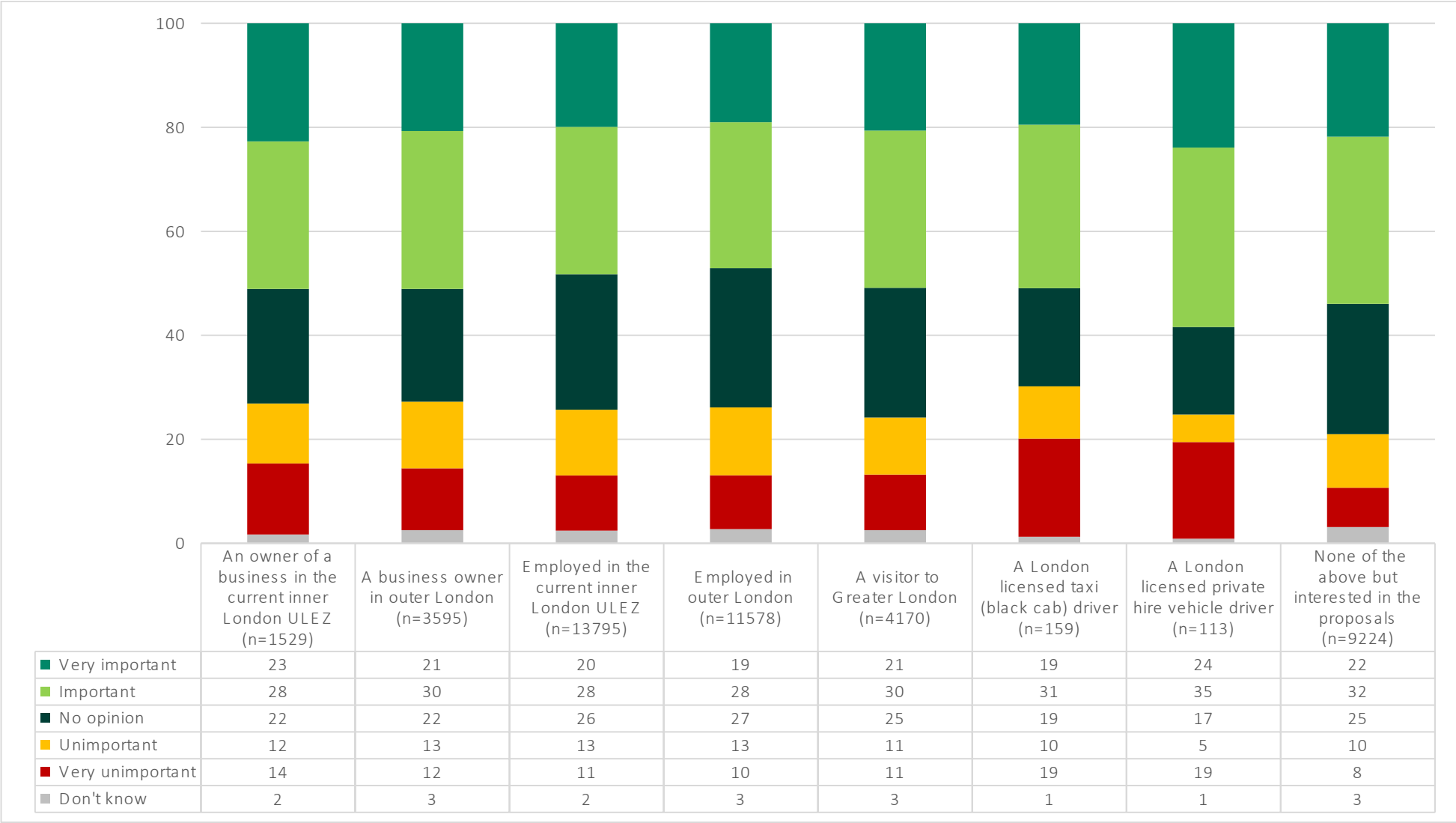
### **Other statistically significant differences between sub-groups:**

- There was a link between frequency of driving and how important respondents viewed the importance of tackling the climate emergency by reducing emissions in London. Of those who stated that they never drive, 58 per cent felt it was very important compared with 10 per cent of those who stated that they drove every day;
- Those who stated that they do not own a vehicle were more likely to say that it was very important to tackle the climate emergency by reducing emissions (75 per cent) compared to those who own a vehicle which did meet the emissions standards for the ULEZ (28 per cent) or did not meet the emissions standards (12 per cent); and
- Younger respondents (aged 25 and under) had a stronger feeling of importance regarding tackling the climate emergency by reducing emissions, with 44 per cent saying it was very important compared to those aged 46 to 65 (23 per cent) and those aged 66 and above (23 per cent).

### **Improve journey times and reliability for freight and servicing trips**

Of private hire vehicle drivers, 35 per cent stated it was important, with 24 per cent stating it was very important to improve journey times and reliability for freight and servicing trips.

Figure 5.8: Level of importance for a new scheme to improve journey times and reliability for freight and servicing trips (%)



### **Other statistically significant differences between sub-groups:**

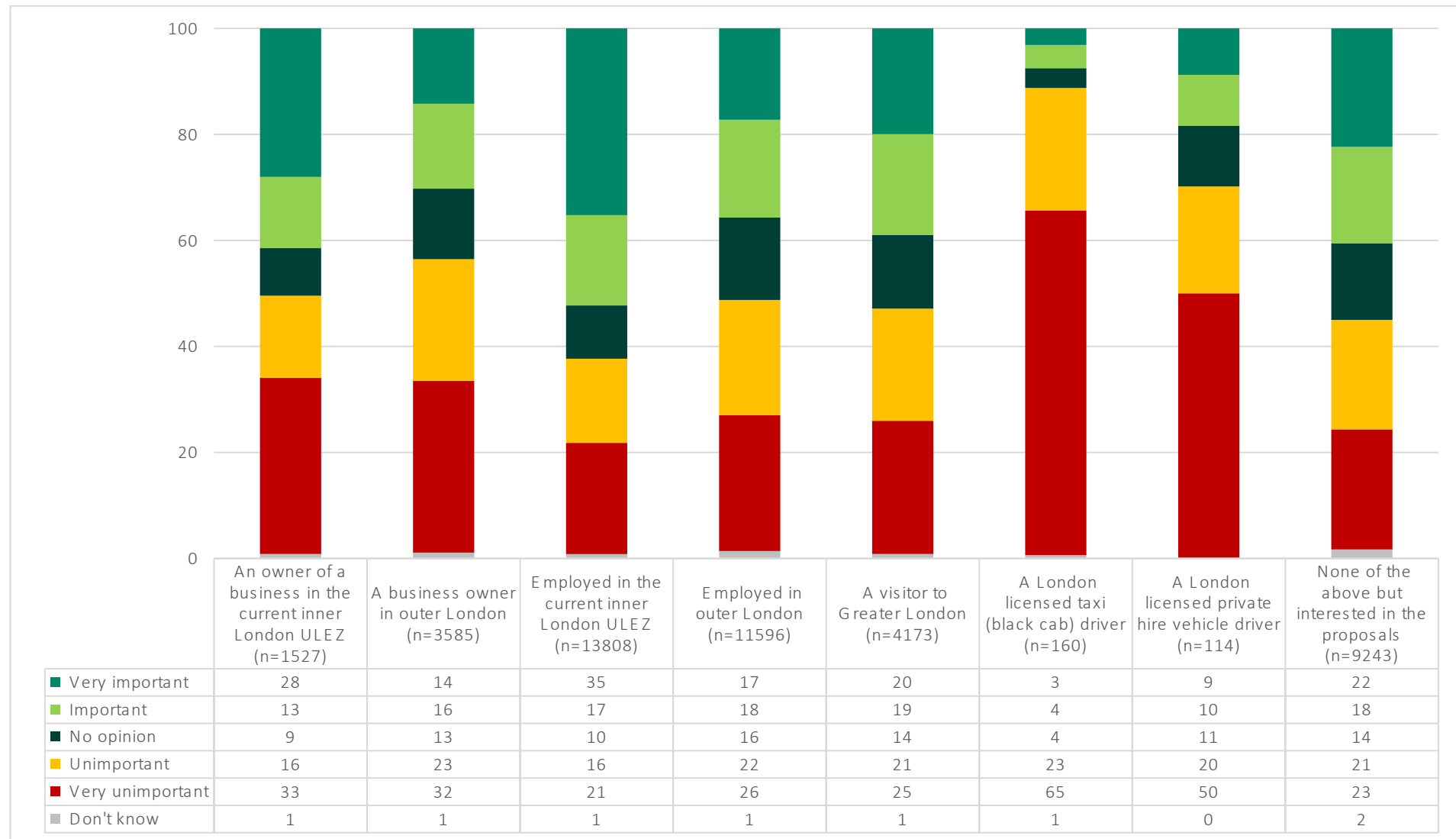
- There was a link between frequency of driving and how important respondents viewed the importance of improving freight journey times and reliability including service trips in London. Of those who stated that they never drive, 39 per cent felt it was very important compared with 19 per cent of those who stated that they drove every day; and
- Younger respondents (aged 25 and under) had a stronger feeling of importance regarding tackling the climate emergency by reducing emissions, with 25 per cent saying it was very important compared to 19 per cent of those aged 26 to 25 or 21 per cent for those aged 46 to 65.

### **Provide more space for walking and cycling**

Of the respondents employed in the current inner London ULEZ, 52 per cent felt that it was important at some level to provide more walking and cycling space in London compared to business owners who are based in the current inner London ULEZ (30 per cent).

London taxi drivers were more likely to say that it was unimportant to provide more space for walking and cycling, with 65 per cent saying it was very unimportant and 23 per cent saying it was unimportant.

**Figure 5.9: Level of importance for a new scheme to provide more space for walking and cycling (%)**





### **Other statistically significant differences between sub-groups:**

- There was a link between frequency of driving and how important respondents viewed the importance to provide more space for walking and cycling in London. Of those who stated that they never drive, 56 per cent felt it was very important compared with 10 per cent of those who stated that they drove every day;
- Those who stated that they do not own a vehicle were more likely to say that it was very important to provide more space for walking and cycling (71 per cent) compared to those who own a vehicle which did meet the emissions standards for the ULEZ (25 per cent) or did not meet the emissions standards (14 per cent);
- Those who live in the current inner London ULEZ were more likely to feel that walking and cycling space was important than those who live elsewhere, 66 per cent felt it was important compared to 25 and 21 per cent of those who live in outer London or outside Greater London; and
- Younger respondents (aged 25 and under) had a stronger feeling of importance regarding providing more space for walking and cycling, with 38 per cent saying it was very important compared to those aged 46 to 65 (22 per cent) and those aged 66 and above (18 per cent).

## **5.2 Elements to consider for a future road user charging scheme**

### **5.2.1 Overall Summary**

Respondents were asked to identify which elements should be considered if a future road user charging scheme was to be developed. Respondents could choose as many of the ten options as they preferred. The top three considerations identified were:

- 55 per cent stated 'the type of vehicle';
- 53 per cent stated 'how polluting the vehicle is'; and
- 51 per cent stated 'the time of day'.

**Table 5.2: Elements to be considered for future road user charging schemes (%)**

Element	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder*
The type of vehicle (for example car, van, HGV)	55	55	49	66
How polluting the vehicle is	53	53	47	55
The time of day	51	51	44	54
Other costs of driving (fuel duty and Vehicle Excise Duty)	50	50	43	41
The distance driven	48	48	41	48
Household income	48	48	42	39
Where the vehicle is driven in London	46	46	39	51
The number of journeys driven each day, week or month	44	44	37	41
The alternatives available for walking, cycling or public transport	39	39	31	38
Ability to choose between daily charges and pay as you go	36	36	27	31
Total	42,923	42,818	37,878	105

Base: all respondents (42,818 public; 105 stakeholders; 14,987 total did not answer this question)

\*Only 105 stakeholders answered this question therefore the percentages should be treated with caution

Respondents could choose more than one option and therefore percentages will not equal 100 per cent

Campaign respondents' responses are included in Table 5.2.

Respondents who stated they lived in outer London felt the type of vehicle, other costs of driving, household income and where the vehicle is driven in London should be considered for future road user charging schemes, while respondents who stated that they currently live in the inner London ULEZ area felt how polluting the vehicle is and the type of vehicle as the two main points for consideration. Table 5.3 shows all the responses provided based on residency.

**Table 5.3: If a future road user charging scheme was to be developed to replace the existing schemes, what elements should be considered - residency (%)**

Element	In the current inner London ULEZ	In outer London	Outside Greater London
How polluting the vehicle is	79	45	40
The type of vehicle (for example car, van, Heavy Goods Vehicle)	71	50	46
The time of day	64	46	46
The distance driven	62	43	39
The alternatives available for walking, cycling or public transport	59	32	32
The number of journeys driven each day, week or month	55	40	38
Household income	54	46	45
Where the vehicle is driven in London	53	43	42
Other costs of driving (fuel duty and Vehicle Excise Duty)	48	49	52
Ability to choose between daily charges and pay as you go	48	31	30
Base	10,550	26,587	5,185

Base: all respondents who answered the question and where residency could be determined

Respondents could choose more than one option and therefore percentages will not equal 100 per cent

#### Other statistically significant differences between sub-groups:

- There were 61 per cent of respondents aged under 25 that stated household income should be a consideration compared to those aged 26 to 45 (47 per cent), those aged 46 to 65 (40 per cent); and
- For respondents who considered themselves to have a disability, the main considerations for future road charging schemes were household income at 54 per cent, and 51 per cent stating other costs of driving (fuel duty and Vehicle Excise Duty).

## 5.3 Themes from comments about the future of road user charging

This section shows the main themes that were mentioned in the comments provided about the future of road user charging from all respondents. There were a large number of different themes mentioned about the possible future of road user charging, therefore those most often mentioned are shown in this section and the full list of themes of comments about the future of road user charging are provided in **Appendix C**.

### 5.3.1 Public transport

Respondents also provided comments about investing and encouraging the use of public transport in London. The main comment received focused on the need to invest and improve

public transport in London. All respondents could provide a comment and are included in Table 5.4.

**Table 5.4: Comments about Public Transport**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Need to invest/improve public transport (e.g. more frequent, availability and accessibility in areas etc)	1612	1602	1601	10
Need to improve public transport in central/inner London	16	16	16	0
Need to improve public transport in outer London	199	199	199	0
Need to encourage / incentivise more use of public transport (e.g. should make it cheaper)	931	930	930	1
Total number who commented on this topic	2301	2290	2289	11

### 5.3.2 Future road user charging scheme boundary

Respondents also provided comments about the boundary for future road user charging schemes in London. The main comment received felt that the boundary should only cover central and inner London. All respondents could provide a comment and are included in Table 5.5 below.

**Table 5.5 Comments about Boundary for Future Road User Charging schemes**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
The boundary for charging schemes should only be central and inner London	619	617	617	2
Other comments / suggestions about the boundary for charging schemes	434	430	430	4
The boundary for charging schemes should cover all of London	25	25	25	0
Total number who commented on this topic	1,049	1,043	1,043	6

### 5.3.3 Active travel and health

Respondents also provided comments about the need to improve and encourage walking and cycling in London. All respondents could provide a comment and are included in Table 5.6 below.

**Table 5.6 Comments about Active Travel and Health**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Suggest improving cycling infrastructure	426	424	422	5
Suggest improving the safety of cyclists	248	248	248	2
Suggest improving walking infrastructure	181	178	175	1
Need to invest / improve active travel (general comments)	176	171	170	3
Suggest improving safety of pedestrians	137	136	136	1
Need to encourage / incentivise more use of active travel	133	131	131	2
Need to improve physical activity / obesity	33	33	33	0
Need to improve / protect mental health	9	9	9	0
Total number who commented on this topic	962	951	948	11

### 5.3.4 Charges for a future road user scheme

Respondents also provided comments about how charges might be structured for any future road user charging scheme. All respondents could provide a comment and are included in Table 5.7.

**Table 5.7 Charges for Future Road User Charging Schemes**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Charging should be based on emissions (e.g. worst polluters pay more)	648	624	620	24
Charges should be based on miles travelled	629	614	610	15
Other suggestions for charge amounts / structure	610	602	602	8
Charging should be based on vehicle size / weight/ type / safety of vehicle	491	482	482	9
Should have travel allowances (e.g. how many miles or how often a vehicle can be used before being charged)	305	299	299	6
Charge should be based on where it is being driven/ higher for areas with more congestion / worse air quality	262	248	248	14
Charges should only impact short journeys (e.g. less than five miles)	261	255	253	6
Charges should be based on the availability of walking/cycling/public transport alternatives	246	234	234	12
Charges should be based on frequency of vehicle use	203	202	202	1
Include all vehicles in charging regardless of emissions/Euro standards	202	201	200	1
Other road users should be charged (e.g. cyclists)	190	190	190	0
Charges should be based on time of day (e.g. higher during peak times and lower during off-peak)	185	171	171	14
Charges should be higher for businesses / delivery companies / vehicles	120	120	120	0
Charges should be pay-as-you-go/pay per journey (e.g. fixed charge per journey)	112	109	109	3
Total number who commented on this topic	3,424	3,375	3,364	49

### 5.3.5 Times of operation

Respondents also provided comments about timings when the charging schemes should come in to effect, for example suggesting specific times of day and/ or days of the week that charges should be applicable. Similarly, other suggestions were made for a charging period to be based on a 24 hour period rather than a set start and end time. All respondents could provide a comment and are included in Table 5.8 below.

**Table 5.8 Comments made in relation to operating times**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Charging schemes should be in effect during specific times of the day/not all 24 hours of the day	105	104	104	1
Charging schemes should only be in effect during weekdays/weekends should not be included in the charging scheme	40	39	39	1
Charging schemes should be in effect/operation 24/7/all 24 hours of the day	21	21	21	0
Charging schemes should be in effect/operation all days of the week (weekdays and weekends)	4	4	4	0
Other comments/suggestions about when charging schemes are in effect	115	111	111	4
Total number who commented on this topic	273	267	267	6

### 5.3.6 Other charging schemes

Some respondents also suggested other changes to the Congestion Charge scheme and LEZ.

**Table 5.9 Comments made in relation to other charging schemes**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Suggest other changes to the Congestion Charge scheme	104	100	100	4
Suggest other changes to the LEZ	12	12	12	0
Total number who commented on this topic	5,175	5,127	5,095	48

### 5.3.7 General Comments for the Future Road User Charging Scheme

Respondents provided general comments about future road user charging schemes, the main comment received was to oppose having a road user charging scheme. All respondents were able to respond to the question and are included in Table 5.10.

**Table 5.10 General Comments for the Future Road User Charging Scheme**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Oppose having road user charging schemes (general comments)	3,242	3,234	3,234	8
Charging schemes are just another tax/money-making schemes/revenue raised will not be used to improve infrastructure	2,913	2,905	2,905	9
Stop targeting/penalising motorists	1,609	1,606	1,606	3
Future charging schemes need to be fair	932	921	921	11
Road user charging schemes are not necessary to address congestion/air quality/climate emergency/they are not issues	784	779	779	5
Support having road user charging schemes/they are needed (general comments)	660	616	600	44
Find alternative ways in which to charge (e.g. fuel tax)	412	411	411	1
Total number who commented on this topic	8,929	8,838	8,822	91

### 5.3.8 Future Exemptions and Discounts

Respondents provided comments on the consideration of exemptions and discounts for a future road user charging scheme, the main comment received stated that residents should not have to pay a charge. All respondents were able to respond to the question and are included in Table 5.11.



**Table 5.11 Comments about Future Exemptions and Discounts**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
London residents should not have to pay charges/should be exempt	276	276	276	0
Should be discounts/exemptions for those on low incomes/charging should take household income into account	270	262	262	8
Other comments about discounts and exemptions	175	172	172	3
Other named groups/vehicles should receive exemptions/discounts	168	165	165	3
NHS/key workers should receive discounts/exemptions	124	123	123	1
Should be discounts/exemptions for disabled people	114	111	110	3
Should be discounts / exemptions for elderly / vulnerable people	107	107	107	0
Total number who commented on this topic	1,614	1,595	1,594	19

### 5.3.9 The Financial Impact of the Future for Road User Charging

Respondents provided comments about the financial impact considerations that may need to be considered as part of the development of a future road user charging scheme. The main comment received identified concerns over the ability to pay charges or upgrade their vehicle. All respondents were able to respond to the question and are included in Table 5.12.

**Table 5.12 Comments about the Financial Impact of Future Road User Charging**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Concerns about ability to pay charges/upgrade vehicles to be complaint/concerns about vehicles being devalued	1,045	1,044	1,044	1
Concerns that charges will be unfair on those who have to travel to/from/for work	668	665	665	3
Will have detrimental impacts on London/London's economy/businesses	496	495	495	1
Funding/financial support should be provided to support the upgrading/replacing of vehicles	317	315	315	2
Other comments about financial impacts of future road charging schemes	282	281	281	1
Concerns that residents will relocate outside of London to avoid paying charges	257	257	257	0
Will have detrimental impacts on small businesses	151	151	151	0
Concerns that costs of charging schemes will be passed onto residents/customers from businesses/services	133	131	131	2
Will have a detrimental impact on my business/livelihood	75	75	75	0
Concerns that businesses will relocate outside of London to avoid paying charges	54	54	54	0
Total number who commented on this topic	2,900	2,890	2,890	10

### 5.3.10 The Social Impact of the Future for Road User Charging

Respondents provided comments about the possible social impacts that may need to be considered as part of the development of a future road user charging scheme. The main comment received noted that any future road user charging scheme should consider the impact associated with the rising cost of living. All respondents were able to respond to the question and are included in Table 5.13.

**Table 5.13 Comments about Social Impact of Future Road User Charging**

	<b>All responses</b>	<b>Public (includes campaigns)</b>	<b>Public (excludes campaigns)</b>	<b>Stakeholder</b>
Having and using a car is a necessity because of needs/cannot use other transport modes	983	981	981	2
Public transport provisions are poor/not a viable alternative/safety concerns with using public transport	918	915	915	3
Future charging schemes need to consider the cost of living/issues at the time impacting on finances	971	967	967	4
Concerns charging schemes will have detrimental impacts on people's lives	492	491	491	1
Concerns charging schemes will push people into/towards poverty	304	300	300	4
Will negatively impact on social/leisure activities/visiting friends and family/concerns about social isolation	319	318	318	1
Total number who commented on this topic	3,677	3,664	3,664	13

### **5.3.11 Reducing congestion, improving air quality and tackling the climate emergency**

Respondents also provided comments about other ways to reduce congestion, improve air quality, and tackle the climate emergency in London. The main comment provided focused on the need to remove / amend traffic measures which respondents felt were contributing to the issue of congestion. All respondents could provide a comment and are included in Table 5.14 below.

**Table 5.14: Comments about suggestions to reduce congestion, improve air quality, and tackle the climate emergency**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Need to remove/make changes to other traffic measures/schemes that cause congestion/air quality (e.g. bus lanes)	1,625	1,617	1,617	8
Other suggestion for improving congestion/air quality/climate emergency	1,129	1,125	1,142	4
Need more schemes to deter driving/promote use of alternatives	580	569	554	11
Need to target other sources of pollution (e.g. airports, new developments, wood burners)	553	550	550	3
Need more focus on improving existing road infrastructure (e.g. expanding capacity, improvements to junctions, routes)	535	528	527	7
Suggestions for other areas to focus on that are higher priority than congestion/air quality/climate emergency	310	310	310	0
Needs to be more investment in electric vehicles/EV infrastructure	291	290	290	1
Need to encourage/incentivise more use/switching to electric vehicles	252	252	252	0
Should ban non-compliant/most polluting vehicles instead of a charging them	237	236	229	1
Need to improve green space (e.g. plant more trees)	227	223	221	4
Total number who commented on this topic	5,175	5,127	5,095	48

## 6. Protected characteristics, other personal characteristics, and integrated impact assessment

Some respondents commented about the impact proposals would have on themselves directly or on others who have specific lifestyle or personal characteristics. Table 6.1 lists these types of characteristics and the number of comments provided by any respondent for each one.

**Table 6.1 Comments about protected characteristics, other personal characteristics, and integrated impact assessment**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Comment refers to low incomes/financially struggling	13,108	12,972	8,238	136
Comment refers to age (younger and older people)	3,567	3,509	3,461	58
Comment refers to disabled people/mobility issues	1,909	1,854	1,830	55
Comment refers to vulnerable	737	700	509	37
Respondent identifies themselves as a sole trader/small business in their comment	532	527	527	5
Respondent identifies themselves as an NHS worker	226	224	221	2
Comment refers to gender/sex	147	139	139	8
Comment about the integrated impact assessment (IIA) carried out for the consultation (general comments)	99	65	65	34
Comment refers to ethnic groups/minorities	72	66	66	6
Comments about alternatives considered in the IIA	18	15	15	3
Comment refers to religion and/or belief	22	22	22	0
Comment refers to sexual orientation	16	14	14	2
Total number who commented on this topic	17,455	17,266	12,264	189

## 7. Comments on the consultation process and material

### 7.1.1 Summary

Respondents rated the quality of website accessibility highest, with 76 per cent considering it to be adequate, good, or very good. Respondents rated the quality of the consultation to be adequate, good, or very good in terms of written information (71 per cent) and website structure and ease of finding what they needed (72 per cent), with 22 per cent rating these components as poor or very poor. There were mixed opinions about the online survey format, with 73 per cent rating it as adequate, good, or very good but 24 per cent rating it as poor or very poor.

**Table 7.1 What do you think about the quality of this consultation? (%)**

Component of consultation	Very good	Good	Adequate	Poor	Very poor	N/A
Website structure & ease of finding what you needed	10	24	38	11	11	6
Written information	9	24	38	11	11	7
Maps, images & related diagrams	7	19	34	12	10	19
Online survey format	10	25	38	13	12	3
Website accessibility	9	28	39	8	7	9
Promotional material	4	12	30	12	13	29
Events and drop-in sessions	2	5	16	9	13	56

Base: Website 39,820, Written info 39,452, Maps 39,261, Online survey 39,524, Website accessibility 39,294, Promotional material 39,010, Events 38,929.

### 7.1.2 Themes showing criticisms of the consultation process

Some respondents chose to support or criticise the policy makers as shown in Table 7.2. The themes commented on most often are shown in the table, all the themes are shown in **Appendix C**.

**Table 7.2 General Comments about the policy makers**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Negative comments / criticism of the Mayor	11,443	11,423	66,94	20
Negative comments / criticism of TfL	2,455	2,439	2,439	16
Negative comments / criticism of government	1,933	1,927	1,926	6
Comment / comparison to other country / city	1,235	1,221	1,207	14
Total number who commented on this topic	18,093	17,984	13,213	109

An additional 819 comments were made which were considered to be out of the scope of the consultation, of which 812 were from the public and 7 from stakeholders.

### 7.1.3 Themes from comments about the consultation

Respondents provided comments on the ULEZ expansion consultation process, the main comment received expressed negative feedback about the consultation as shown in Table 7.3 below.

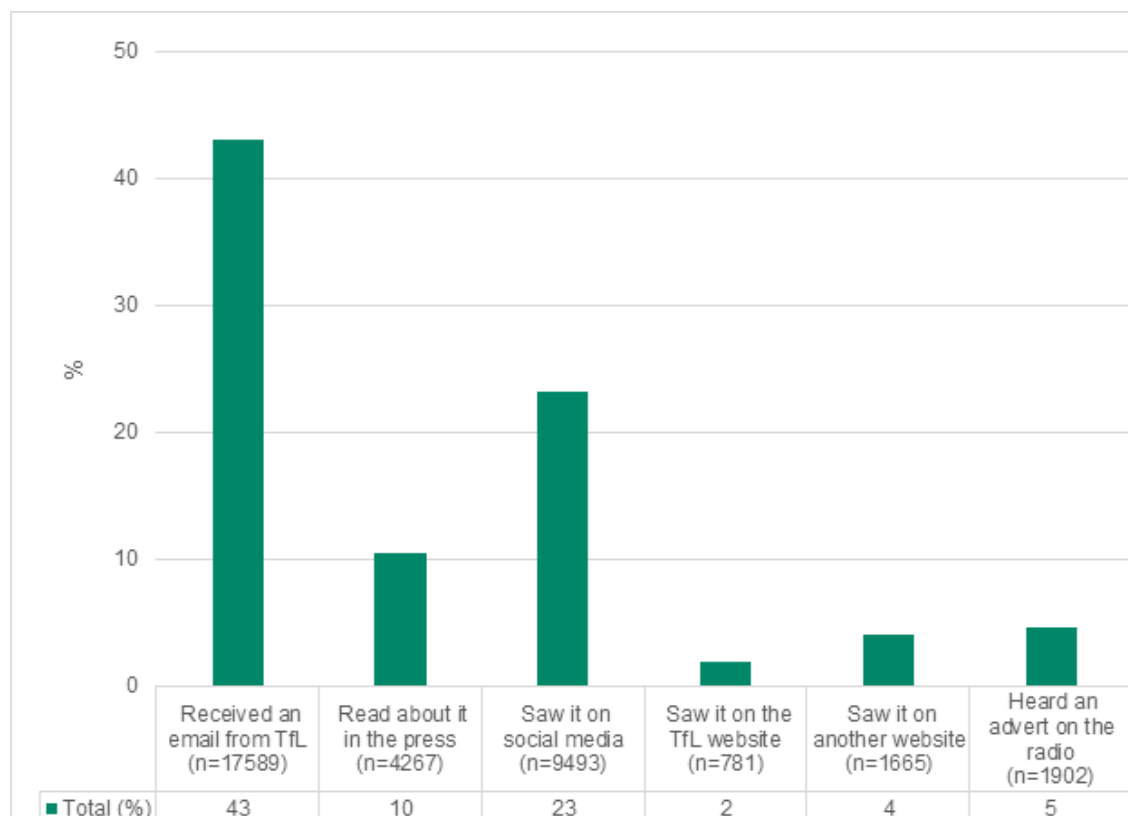
**Table 7.3 Comments relating to the consultation**

	All responses	Public (includes campaigns)	Public (excludes campaigns)	Stakeholder
Negative comments about consultation	1,901	1,874	1,872	27
Other comments about consultation	125	109	109	16
Positive comments about consultation	28	28	28	0
Comment about legally challenging the proposals	39	38	38	1
Total number who commented on this topic	18,093	17,984	13,213	109

### 7.1.4 How respondents heard of consultation

As part of a process to monitor and improve methods of communication to the public, TfL asked respondents how they heard about the consultation. Of those that responded, 43% had received an email from TfL inviting them to take part.

**Figure 7.1 How did you hear about this consultation (the main way you heard)?**



Base: all respondents who answered (40,818)

## Appendix A – Questionnaire

### 1. Background

We are consulting on proposals to extend the Ultra Low Emission Zone (ULEZ) London-wide from 29 August 2023. The current zone is within the North and South Circular Roads.

The ULEZ sets minimum emissions standards for “light” vehicles, such as cars, motorcycles and vans: drivers of vehicles that don’t comply must pay a £12.50 daily charge to drive within the Zone unless an exemption or discount applies. Most drivers in Greater London already have compliant vehicles with more than four in five vehicles in outer London already meeting ULEZ standards.

These proposals are part of the commitment by the Mayor of London and TfL to help improve air quality and public health, tackle the climate emergency and reduce traffic congestion.

Please answer two background questions first.

#### Q1. How concerned are you about air quality where you live?

*Concern scale: very concerned/ concerned/ No opinion /unconcerned/very unconcerned/don’t know*

*[question type - radio button]*

**Q2. Does your vehicle(s) meet the emission standards required to drive in London without paying the ULEZ charge?** Click [here](#) (link to checker) to check your vehicle if you are unsure.

- Yes – my vehicle meets the standards
- Yes – I have more than one vehicle, all of which meet the standards
- No – my vehicle doesn’t meet the standards
- No – I have more than one vehicle, one or more of which do not meet the standards
- I don’t know
- I don’t own a vehicle

*[question type - radio button]*



## 2. Proposed expansion of the Ultra Low Emission Zone (ULEZ) London-wide in 2023 including changes to Auto Pay and Penalty Charge levels

The following questions are about our proposals for the expansion of the ULEZ London-wide. These include questions on discounts, exemptions, reimbursements, and a vehicle scrappage scheme. There are also questions on changes to Auto Pay and Penalty Charge Notice levels for non-payment of the ULEZ and Congestion Charges. For full details please see the consultation materials.

Some drivers and vehicles qualify for a discount, exemption or reimbursement under the current inner London ULEZ and it is proposed that these arrangements would continue to apply in the expanded zone.

Full information is available here: [tfl.gov.uk/modes/driving/ultra-low-emission-zone/discounts-and-exemptions](https://tfl.gov.uk/modes/driving/ultra-low-emission-zone/discounts-and-exemptions)

In addition, some vehicles qualified for a temporary 100 per cent ULEZ discount and it is proposed that these arrangements are extended to the dates indicated below to allow further time to adjust to the proposed expansion:

- Disabled and disabled passenger tax class vehicles (until 24 October 2027)
- Wheelchair accessible private hire vehicles (until 24 October 2027)
- Minibuses used for community transport (until 26 October 2025)

### **Q3. Are you registered for a discount or entitled to an exemption for the current ULEZ?**

Yes/No/Don't know [question type - radio button] if yes selected please open to the choices. Below

Please indicate the relevant discount or exemption

- Vehicles for disabled people (with 'disabled' or 'disabled passenger vehicle' tax class)
- Minibuses used for community transport registered for discount
- Wheelchair-accessible private hire vehicles
- Other exempt vehicles, such as specialist agricultural vehicles, military vehicles, non-road going vehicles and mobile cranes
- Taxis
- Historic vehicles
- Showman's vehicles registered for discount
- Other (please use the comments box at the end of this section of the questionnaire to let us know)

[question type – check box and skip logic]

Some drivers and vehicles can claim a reimbursement of the ULEZ daily charge under an NHS patient reimbursement scheme. Full information is available here:  
<https://tfl.gov.uk/modes/driving/reimbursements-of-the-congestion-charge-and-ulez-charge>

**Q4. Have you claimed a reimbursement of the ULEZ charge under the NHS patient reimbursement scheme?**

Yes/No/Don't know

*[question type - radio button]*

**Q5. How important do you consider it is to continue to have these existing discounts and exemptions and reimbursements for the ULEZ?**

*Importance scale (very important important/no opinion/unimportant/very unimportant/don't know)*

*[question type - radio button]*

Please use the comments box at the end of this section of the questionnaire to let us know of any views you have on this issue.

**Q6. Do you think we should provide any further discounts, exemptions or reimbursements for the ULEZ?**

Yes/No/don't know

*[question type - radio button]*

Please use the comments box at the end of this section of the questionnaire to let us know any views you have on this issue.

**Q7. We are proposing to expand the ULEZ London-wide on 29 August 2023. What do you think of the implementation date?**

- It should be earlier
- It is the right date
- It should be later
- It should not be implemented at all
- I don't know

*[question type - radio button]*

Please use the comments box at the end of this section of the questionnaire to let us know of any views you have on this issue

For the London-wide ULEZ proposal the Mayor is considering a large-scale and targeted vehicle scrappage scheme to support Londoners, including, for example, those on low incomes, disabled people, charities and businesses.

**Q8. How important is it that the proposed expansion of the ULEZ is supported by a scrappage scheme?**

*Importance scale*

*[question type - radio button]*

Please use the comments box at the end of this section of the questionnaire to let us know of any views you have on this issue.

To ensure that Penalty Charge Notices (PCNs) remain an effective deterrent, we are proposing to increase the PCN for the ULEZ from £160 to £180 for people with a non-compliant vehicle who do not pay the daily charge from 30 January 2023. We are also proposing to increase the PCN for the Congestion Charge, by the same amount, at the same time. If paid within 14 days, the amount would reduce by half.

**Q9. Do you consider the proposed PCN level of £180 is?**

- *Sufficient to act as an effective deterrent*
- *Not high enough to act as an effective deterrent*
- *Too high*
- *Do not know*
- *No opinion*

*[question type - radio button]*

Please use the comments box at the end of this section of the questionnaire to let us know of any views you have on this issue.

**Q10. How important is it that we remove the annual £10 Auto Pay administration fee per vehicle (for the ULEZ, the Low Emission Zone (LEZ), and the Congestion Charge)?**

The proposed removal of this fee would take place from 30 January 2023.

*Importance scale*

*[question type - radio button]*

Please use the comments box at the end of this section of the questionnaire to let us know of any views you have on this issue.

There are strict rules in place controlling the use of personal information. We have completed a Data Protection Impact Assessment available on our website. This sets limits on how this information can be used.

**Q11. How concerned are you about use of your data and the installation of more Automatic Number-Plate Recognition (ANPR) cameras to collect information on vehicle movements to enforce an expanded London-wide ULEZ?**

*Concern scale*

*[question type - radio button]*

Please use the comments box at the end of this section of the questionnaire to let us know of any views you have on this or anything else related to the use of personal information in an expanded ULEZ scheme.

**Q12. If you own a vehicle(s) that is not currently compliant with emissions standards and if we proceed with our proposals to expand the ULEZ to outer London , what do you intend to do?**

(if your vehicle is compliant or you do not own a vehicle skip this question). Please tick all that apply.

- Walk or cycle more
- Use public transport more
- Use taxis or private hire vehicles more
- Use a car club
- Trade the vehicle in for a compliant one
- Get rid of the vehicle
- Pay the charge when I use the vehicle
- Not make journeys I would have done
- I would do something else not listed
- Don't know

*[question type – check box]*

Please use the comments box at the end of this section of the questionnaire to let us know of any views you have on this issue.

**Q13. Please use this space to give us any comments about these proposals or impacts identified as part of the Integrated Impact Assessments. If you have identified any impacts, please let us know any suggestions to mitigate or enhance these.**

*[question type – open]*

### 3. Revision of the Mayor's Transport Strategy (MTS)

The Mayor's Transport Strategy (MTS) is a document that sets out the Mayor's vision for transport in London.

In the current MTS, Proposal 24 sets out that the ULEZ will be expanded to inner London in 2021, which happened in October 2021.

We now need a supplementary proposal and text to explain the importance of road user charging schemes, including the proposed London-wide ULEZ, to address the triple challenges of toxic air pollution, the climate emergency and traffic congestion as well as other MTS objectives.

These changes are described in a supporting document for the proposed amendments to the Mayor's Transport Strategy, and the draft amendment

**Q14. Please use this space to give us any comments about the proposed revision to the Mayor's Transport Strategy.**

[question type – open]

## Shaping the future of road user charging in London

### Scene setting

Please let us know how important you think it is for us to take steps to address the triple challenges affecting London of improving air quality, tackling the climate emergency and reducing traffic congestion.

**Q15. How important is it to you that we take further steps to tackle air pollution in London?**

*Importance scale*

*[question type – radio button]*

**Q16. How important to you is it that we take further steps to tackle the climate emergency by reducing emissions in London?**

*Importance scale*

*[question type - radio button]*

**Q17. How important to you is it that we take further steps to tackle traffic congestion in London?**

*Importance scale*

*[question type - radio button]*

**Q18. How important to you is it that we take further steps to improve the health of Londoners and address health inequality in London?**

*Importance scale*

*[question type - radio button]*

Each element of the triple challenges is complex and cannot be comprehensively addressed by any one measure. Reducing traffic is key; road user charging schemes have proven to be successful in achieving this and will need to be part of the solution.

New technology could be used to integrate existing schemes such as the Congestion Charge, LEZ and ULEZ into a smarter, simpler and fair scheme that would charge motorists on a per mile basis. Different charging rates would apply depending on variables such as how polluting a vehicle is, the level of congestion in the area and access to public transport.

For any new road user charging scheme to be effective, we would also need to continue to make improvements to walking, cycling and public transport. If we do all of these things together, we could reduce traffic, making room for essential car journeys, improving journey times for buses, emergency services and freight and servicing trips as well as cutting the number of hours spent stuck in traffic and its associated costs. We are now starting to explore the potential for future road user charging.

Any potential scheme would be subject to further public and stakeholder consultation on detailed proposals at a later date.

More information is available in the document “Our Proposals to help improve air quality, tackle the climate emergency, and reduce congestion by expanding the ULEZ London-wide and other measures”

Please answer three questions to help shape the future of road user charging in London.

**Q19. If we were to develop a future road user charging scheme to replace our existing schemes, how important is it for the new scheme to address the following challenges?**

Challenges	Very important	Important	No opinion	Unimportant	Very unimportant	Don't know
Tackle air pollution						
Tackle the climate emergency by reducing emissions						
Tackle traffic congestion						
Improve health and wellbeing						
Provide more space for walking and cycling						
Improve bus journey times and reliability						
Improve journey times and reliability for freight and servicing trips						
Make roads safer for everyone						

*[question type – likert] Use matrix style question with challenges in the vertical column and importance scale on the horizontal – example format shown in notes*

Please use the comments box at the end of this section of the questionnaire to let us know of any views you have on this issue.

**Q20. If we develop a future road user charging scheme to replace existing schemes, what elements should be considered?** (select all that apply)

- The distance driven
- The time of day
- The type of vehicle (for example car, van, Heavy Goods Vehicle)
- How polluting the vehicle is
- Where the vehicle is driven in London
- The alternatives available for walking, cycling or public transport
- Household income
- Ability to choose between daily charges and pay as you go
- The number of journeys driven each day, week or month
- Other costs of driving (fuel duty and Vehicle Excise Duty)

*[question type – check box]*

Please use the comments box at the end of this section of the questionnaire to let us know of any views or suggestions you have to help shape the future of Road User charging.

**Q21. Please use this space to give us any comments or suggestions you have about shaping the future of road user charging in London.**

Open question



## About you:

### Demographics are asked when registering on the portal

#### Q22. Are you a resident:

- In the current inner London ULEZ (the area within the North and South Circular)
- In outer London
- Neither of the above
- Don't know

*[question type - radio button]*

#### Q23. Please confirm your postcode

---

#### Q24. Are you please tick all that apply (profile of respondent)

- An owner of a business in the current inner London ULEZ (the area within the North and South Circular)
- A business owner in outer London
- Employed in the current inner London ULEZ
- Employed in outer London
- A visitor to Greater London
- A London licensed taxi (black cab) driver
- A London licensed private hire vehicle driver
- None of the above but interested in the proposals

Other (please specify)

*[question type - checkbox]*

#### Q25. How often do you drive in Greater London?

Never/ less than once a month/ 1-3 times a month/ 1-2 days a week/ 3-4 days a week/ 5-6 days a week/ every day

*[question type - radio button]*

#### Q26. If you are responding as an official representative of an organisation then please provide your organisational name \_\_\_\_\_

#### Q27. What do you think about the quality of this consultation?

Very good/good/adequate/poor/very poor/not applicable

- Website structure and ease of finding what you needed
- Written information
- Maps, images and related diagrams
- Online survey format
- Website accessibility
- Promotional material

No open question for the quality of consultation

*[question type – likert]*

## Appendix B – Campaign responses

The full text of each response provided as part of a campaign are shown below. This is the standard text and responses that were provided and all respondents were able to change the text or answers offered as standard text before submitting.

Campaign	Standard Text
<b>Fair fuel UK</b>	<p>We oppose the expansion of the ULEZ to cover the outer London Boroughs. It will cause financial problems for a significant number of businesses and</p> <p>residents in, around and visiting London. The hit on businesses will increase living costs for poorer Londoners whom the Mayor admits are already suffering real problems coping. Shockingly, the Mayor has even refused to exempt the charity 'Dogs on the Streets' and disabled Londoners will only get a temporary exemption.</p> <p>We oppose amendments to the Mayor's Transport Strategy to enable him to charge us for driving virtually anywhere in Greater London. This 'tax on moving' is blatantly there to make money out of us. We also oppose having our movements tracked on privacy grounds.</p> <p>Please drop these plans immediately.</p>
<b>Living Streets</b>	<p>To whom it may concern, I am writing in response to the ongoing consultation on the London-wide expansion of the Ultra Low Emissions Zone (ULEZ). I support proposals to expand ULEZ to 33 London boroughs, and the use of road user charging in the delivery and implementation of the ULEZ. In January 2022 a report 'Analysis of a Net Zero 2030 Target for Greater London', commissioned by the Mayor, stated that in order to meet the climate change targets, car traffic must reduce by at least 27% by 2030. Fewer cars on London's roads will also reduce air pollution, cut congestion and achieve Transport for London's Visions Zero target to eradicate deaths and serious injuries on roads in the capital. I agree with Living Streets, the UK charity for everyday walking, when it says that the ULEZ will be instrumental in helping to secure both these outcomes.</p>
<b>London Friends of the Earth Network (via Action Network)</b>	<p>Please accept this email as my response to the consultation on proposals to extend the Ultra Low Emission Zone (ULEZ) London-wide from 29 August 2023. I agree with the proposed amendments to the Mayor's Transport Strategy.</p> <p>I agree with the extension for disabled and disabled passenger tax class vehicles (until 24 October 2027), wheelchair accessible private hire vehicles (until 24 October 2027) and minibuses used for community transport (until 26 October 2025).</p>

**Wearepossible.  
org**

Please accept this email as my response to the consultation on proposals to extend the Ultra Low Emission Zone (ULEZ) London-wide from 29 August 2023. I agree with the proposed amendments to the Mayor's Transport Strategy.

I agree with the extension for disabled and disabled passenger tax class vehicles (until 24 October 2027), wheelchair accessible private hire vehicles (until 24 October 2027) and minibuses used for community transport (until 26 October 2025)

## Appendix C – Coding Tables

### C.1 ULEZ Codes

Topic	Theme	All respondents Count	Public Count	Stakeholder Count
General Support	Support the expansion of the ULEZ	3876	3783	93
	Support the ULEZ but feel the proposed boundary should differ	797	782	15
	Support/recognise a need for action to address/improve congestion/air quality/climate emergency	2854	2740	114
	More needs to be done to achieve the aims/proposals need to go further	868	825	43
	Other general comments showing support	49	45	4
	Proposals do not provide a long-term solution to address air quality/climate emergency/traffic congestion long-term	252	242	10
General Oppose	Oppose/disagree with the expansion of the ULEZ	15515	15470	45
	Oppose/disagree with the existing ULEZ in general/should be abolished	1213	1210	3
	Oppose the expansion of the ULEZ but agree congestion/air quality/climate emergency needs addressing	1303	1262	41
	Concerns/doubts that the motives of the ULEZ expansion are to achieve the stated aims	2129	2116	13
	Proposed changes just another tax/money-making scheme/money raised is not used to improve infrastructure	16997	16945	52
	Stop targeting/penalising motorists	2722	2711	11
	Waste of resources/money/time	771	765	6
	Concerns about the cost of implementation/enforcement of ULEZ (e.g. that the cost will be too high)	614	593	21
	ULEZ expansion is not necessary to address congestion/air quality/climate emergency/they are not issues	2636	2611	25
	Other traffic measures cause congestion/not volume of traffic (e.g. traffic lights, LTNs, cycle lanes etc)	2326	2317	9
	Other opposing general comments	404	396	8
Operation	ULEZ Charge should be lower	589	588	1
	ULEZ Charge should be higher	88	88	0
	Comments about the time the ULEZ is in effect/concerns about multiple charges within a 24-hour period	237	234	3
	Concerns that the required standards to be compliant are too high/should be lower	595	593	2
	Other comments about the operation of the ULEZ	659	630	29

Wider Impacts	ULEZ expansion will have no impact to air quality/health and wellbeing	2015	1981	34
	ULEZ expansion will have a positive impact on air quality/health and wellbeing/will improve it	1037	999	38
	ULEZ expansion will make air quality/pollution/health and wellbeing worse	322	320	2
	ULEZ expansion will have no impact on climate emergency/impact to the environment	487	468	19
	ULEZ expansion will have a positive impact on climate emergency/impact to the environment	671	649	22
	ULEZ expansion will make climate emergency/impact to the environment worse	82	80	2
	ULEZ expansion will have no impact to congestion	700	689	11
	ULEZ expansion will have a positive impact on congestion/will reduce it	659	645	14
	ULEZ expansion will cause more congestion/increase it	279	277	2
	Concerns that the ULEZ will push congestion and pollution outside of the zone/make surrounding areas worse	710	680	30
	ULEZ expansion will encourage more sustainable transport use	156	150	6
Financial Impacts	Penalises people travelling for/to/from work	3496	3431	65
	Penalises key workers	597	562	35
	Penalises tradespeople	632	618	14
	Will have detrimental impacts on London / London's economy/businesses	7799	7716	83
	Will have a detrimental impact on my business/livelihood	817	801	16
	Will have detrimental impacts on small businesses	1417	1367	50
	Will force people out of employment/to change employment	1728	1707	21
	ULEZ costs will be/are being passed onto residents/customers from businesses/services	635	622	13
	Will increase the cost of living	7778	7736	42
	Cannot afford daily charge/to upgrade to a compliant vehicle/concerns about current vehicles being devalued	13300	13192	108
	Funding / financial support should be provided to support the upgrading/replacing of vehicles to be compliant	1789	1739	50
	Businesses will relocate outside of London to avoid paying the charge	273	267	6
	Residents will relocate outside of London to avoid paying the charge	1292	1286	6
	Other comments about financial impacts	244	235	9
Social Impacts	Having and using a car is a necessity because of needs/cannot use other transport modes	6223	6131	92
	Public Transport provisions are poor/not a viable alternative/safety concerns with using public transport	6923	6825	98
	Does not consider the current cost of living crisis/financial crunch/bad timing/impacts from Covid-19	10293	10173	120
	Will have detrimental impacts on people's lives	9100	9023	77
	Will push people into/towards poverty	2318	2309	9
	Will negatively impact those living outside of Greater London	1920	1868	52
	Will have negative impacts on mental health	1017	1006	11
	Will negatively impact on social/leisure activities/visiting friends and family/concerns about social isolation	4207	4149	58
	Other comments about social impacts	140	130	10

Discounts and Exemptions	Support discounts/exemptions	5238	5216	22
	Oppose discounts/exemptions	161	160	1
	Suggest period for temporary discounts / exemptions should be extended / made permanent	58	49	9
	Suggest period for temporary discounts/exemptions should be reduced	6	6	0
	People who live in the ULEZ should not have to pay the charge/should be exempt	825	819	6
	NHS/key workers should receive discounts/exemptions	319	303	16
	NHS patients should receive discounts/reimbursements/exemptions	110	94	16
	Oppose taxis/black cabs not being charged/should not be exempt	161	154	7
	Support taxis/black cabs not being charged/should be exempt	22	20	2
	Oppose Private Hire Vehicles (PHVs) being charged/should be exempt	26	26	0
	Support Private Hire Vehicles (PHVs) being charged/should not be exempt	27	27	0
	Should be discounts/exemptions for emergency service workers	75	73	2
	Should be discounts / exemptions for small / local businesses / sole traders / tradespeople / delivery vehicles	135	129	6
	Should be discounts/exemptions for charities	68	52	16
	Should be discounts/exemptions for businesses (general comments)	32	29	3
	Should be discounts/exemptions for disabled people (those without disabled class vehicles)	5054	5037	17
	Should be discounts / exemptions for elderly / vulnerable people	224	220	4
	Should be discounts/exemptions for those with informal family care arrangements	86	83	3
	Should be discounts/exemptions for those on low incomes/charging should take household income into account	211	201	10
	Should be discounts/exemptions for vehicle-sharing/car-sharing	25	22	3
	Other named groups/vehicles should receive exemptions/discounts	693	668	25
	Other comments about discounts and exemptions	351	333	18
	Should be discounts/exemptions for classic/historical vehicles	489	481	8
	Should be discounts/exemptions for motorcycles	92	89	3
	Should be discounts/exemptions for caravans/campervans	55	53	2
Date	Proposed ULEZ expansion should be implemented sooner	537	525	12
	Proposed ULEZ expansion should be delayed	3257	3196	61
	Other comments about implementation date of ULEZ expansion	168	166	2
Scrappage Scheme	Support scrappage scheme	486	439	47
	Do not support scrappage scheme	432	431	1
	Scrappage scheme will not provide enough money to subsidise replacing a vehicle	2041	2000	41
	Scrapping vehicles is bad for the environment/scrapping perfectly good vehicles is counterproductive	2864	2852	12
	Should not encourage car purchases/should encourage movement away from cars	407	397	10
	Unfair that will need to upgrade again after only upgrading recently but still being classed as non-compliant	1990	1989	1
	Eligibility for the scrappage scheme is unfair/should be available to all	1332	1278	54
	Other comments about scrappage scheme	336	301	35

PCN	Suggest providing incentives to use sustainable transport/active travel as part of/instead of scrappage scheme	150	113	37
	Support proposed PCN increase/should be higher	78	67	11
	Oppose proposed PCN increase/should be lower	625	617	8
	The PCN should be means tested/dependent on income	153	151	2
	Other comments about the PCN	225	218	7
Auto Pay	Support the removal of the Auto Pay administration fee	337	309	28
	Oppose the removal of the Auto Pay administration fee	60	59	1
	Other comments about the Auto Pay administration fee	51	45	6
ANPR	Concerns about data collection by ANPR (e.g. data privacy)	5109	5103	6
	No concerns about data collection by ANPR	34	28	6
	Concerns about the enforcement of the ULEZ using ANPR/concerns about loopholes and ways to avoid the charge	105	105	0
	Other comments about data collection by ANPR	33	29	4
Suggestions and Mitigations	Need to invest/improve public transport (e.g. more frequent, availability and accessibility in areas etc)	2921	2840	81
	Need to encourage/incentivise more use of public transport (e.g. should make it cheaper)	1963	1908	55
	Needs to be more investment in active travel (walking, cycling, infrastructure, pedestrianisation)	217	188	29
	Need to encourage/incentivise more use of active travel (walking, cycling, walking)	503	464	39
	Needs to be more encouragement/investment in other transport schemes to improve air quality/congestion/environment	892	874	18
	Needs to be more investment in electric vehicles/EV infrastructure	1558	1518	40
	Need to encourage/incentivise more use/switching to electric vehicles	750	725	25
	Needs to be more investment in alternative fuel sources	177	173	4
	Needs to be more encouragement/investment in other schemes/areas not specifically related to transport	756	753	3
	Other mitigation comments and/or policy suggestions	1961	1902	59
	Need to target other sources of air pollution (e.g. airports, new developments, wood burners)	1859	1837	22
	Suggest improving cycling infrastructure	850	809	41
	Suggest improving the safety of cyclists	383	369	14
	Suggest improving walking infrastructure	291	255	36
	Suggest improving safety of pedestrians	154	146	8
	Need to improve public transport in central / inner London	45	44	1
	Need to improve public transport in outer London	1036	976	60
	Need to target/reduce noise pollution (e.g. noise from traffic)	108	106	2
	ULEZ charges should be based on miles travelled/charged per mile	339	335	4
	<b>Total</b>	<b>48453</b>	<b>48134</b>	<b>319</b>

## C.2 Future of Road User Charging Codes

Topic	Theme	All Respondents Count	Public Count	Stakeholder Count
General	Support having road user charging schemes/they are needed (general comments)	660	616	44
	Oppose having road user charging schemes (general comments)	3242	3234	8
	Road user charging schemes are not necessary to address congestion/air quality/climate emergency/they are not issues	784	779	5
	Road user charging schemes are a waste of resources/money/time	179	179	0
	Stop targeting/penalising motorists	1609	1606	3
	Future charging schemes need to be fair	932	921	11
	Future charging schemes need to be simple/easy to understand and apply	188	164	24
	Find alternative ways in which to charge (e.g. fuel tax)	412	411	1
	Charging schemes are just another tax/money-making schemes/revenue raised will not be used to improve infrastructure	2913	2905	8
	Technology should be used to provide solutions to congestion/air quality/climate emergency	23	21	2
	Action is needed at a global level to reduce emissions/address air quality/climate emergency	19	15	4
	Other charges/costs of driving should be reduced/removed (e.g. road tax, fuel duty, VED)	110	108	2
Operation	Charging schemes should be in effect/operation 24/7/all 24 hours of the day	21	21	0
	Charging schemes should be in effect during specific times of the day/not all 24 hours of the day	105	104	1
	Charging schemes should be in effect/operation all days of the week (weekdays and weekends)	4	4	0
	Charging schemes should only be in effect during weekdays/weekends should not be included in the charging scheme	40	39	1
	Other comments/suggestions about when charging schemes are in effect	115	111	4
Boundary	The boundary for charging schemes should only be central and inner London	619	617	2
	The boundary for charging schemes should cover all of London	25	25	0
	Other comments / suggestions about the boundary for charging schemes	434	430	4



Future Charging amounts / structures	Include all vehicles in charging regardless of emissions/Euro standards	202	201	1
	Should have travel allowances (e.g. how many miles or how often a vehicle can be used before being charged)	305	299	6
	Charging should be based on vehicle size / weight/ type / safety of vehicle	491	482	9
	Charging should be based on emissions (e.g. worst polluters pay more)	648	624	24
	Charges should be based on miles travelled	629	614	15
	Charges should be based on time of day (e.g. higher during peak times and lower during off-peak)	185	171	14
	Charge should be based on where it is being driven/ higher for areas with more congestion / worse air quality	262	248	14
	Charges should be based on the availability of walking/cycling/public transport alternatives	246	234	12
	Charges should be pay-as-you-go/pay per journey (e.g. fixed charge per journey)	112	109	3
	Charges should be higher for delivery drivers/vehicles/businesses	63	63	0
	Charges should be higher for businesses / delivery companies / vehicles	120	120	0
	Charges should be based on frequency of vehicle use	203	202	1
	Charges should only impact short journeys (e.g. less than five miles)	261	255	6
	Charge should be similar/lower than public transport prices	12	12	0
	Charge should be higher than public transport prices	34	34	0
	Other suggestions for charge amounts / structure	610	602	8
	Charges should be a daily charge / pay once per day (i.e. only pay once per day regardless of how many journeys made)	59	56	3
	Other road users should be charged (e.g. cyclists)	190	190	0
Public Transport	Need to invest/improve public transport (e.g. more frequent, availability and accessibility in areas etc)	1612	1602	10
	Need to improve public transport in central/inner London	16	16	0
	Need to improve public transport in outer London	199	199	0
	Need to encourage/incentivise more use of public transport (e.g. should make it cheaper)	931	930	1
Active Travel	Need to invest/improve active travel (general comments)	176	171	5
	Suggest improving cycling infrastructure	426	424	2
	Suggest improving the safety of cyclists	249	248	1
	Suggest improving walking infrastructure	181	178	3
	Suggest improving safety of pedestrians	137	136	1
	Need to encourage/incentivise more use of active travel	133	131	2
	Need to improve physical activity/obesity	33	33	0
	Need to improve/protect mental health	9	9	0

Future Charging Schemes Other	Should ban non-compliant/most polluting vehicles instead of a charging them	237	236	1
	Need to encourage/incentivise more car clubs/vehicle sharing	86	81	5
	Needs to be more investment in electric vehicles/EV infrastructure	291	290	1
	Need to encourage/incentivise more use/switching to electric vehicles	252	252	0
	Need more schemes to deter driving/promote use of alternatives	580	569	11
	Need to reduce the amount of parking available in London/increase the cost of parking/reduce accessibility	109	104	5
	Need more focus on improving existing road infrastructure (e.g. expanding capacity, improvements to junctions, routes)	535	528	7
	Needs to be more investment in other transport related schemes to improve air quality/congestion/environment	157	156	1
	Need to remove/make changes to other traffic measures/schemes that cause congestion/air quality (e.g. bus lanes)	1625	1617	8
	Need to target other sources of pollution (e.g. airports, new developments, wood burners)	553	550	3
	Need to improve green space (e.g. plant more trees)	227	223	4
	Suggestions for other areas to focus on that are higher priority than congestion/air quality/climate emergency	310	310	0
	Need more funding/investment in outer boroughs not just central London	36	35	1
	Stop Silvertown tunnel project	105	98	7
	Other suggestion for improving congestion/air quality/climate emergency	1129	1125	4
	Need to target/reduce noise pollution (e.g. noise from traffic)	53	53	0
	Suggest other changes to the Congestion Charge scheme	104	100	4
	Suggest other changes to the LEZ	12	12	0

Discounts and Exemptions	Charging schemes should include discounts/exemptions (general comments)	45	45	0
	Charging schemes should not include discounts/exemptions (general comments)	44	43	1
	London residents should not have to pay charges/should be exempt	276	276	0
	NHS/key workers should receive discounts/exemptions	124	123	1
	NHS patients should receive discounts/reimbursements/exemptions	29	29	0
	Should be discounts/exemptions for taxis/black cabs	15	15	0
	Should be no discounts/exemptions for taxis/black cabs	36	36	0
	Should be discounts/exemptions for Private Hire Vehicles (PHVs)	6	6	0
	Should be no discounts/exemptions for Private Hire Vehicles (PHVs)	18	18	0
	Should be discounts/exemptions for tradespeople	92	92	0
	Should be discounts/exemptions for delivery vehicles	60	60	0
	Should be discounts/exemptions for small/local businesses/sole traders	63	63	0
	Should be discounts/exemptions for charities	12	10	2
	Should be discounts/exemptions for businesses (general comments)	48	48	0
	Should be discounts/exemptions for disabled people	114	111	3
	Should be discounts / exemptions for elderly / vulnerable people	107	107	0
	Should be discounts/exemptions for those with informal family care arrangements	42	42	0
	Should be discounts/exemptions for those on low incomes/charging should take household income into account	270	262	8
	Should be discounts/exemptions for vehicle-sharing/car-sharing/charges should be higher for single-occupant-vehicles	73	73	0
	Other named groups/vehicles should receive exemptions/discounts	168	165	3
	Other comments about discounts and exemptions	175	172	3
	Should be discounts/exemptions for classic/historical vehicles	67	66	1
Financial Impact	Concerns that charges will be unfair on those who have to travel to/from/work	668	665	3
	Will have detrimental impacts on London/London's economy/businesses	496	495	1
	Will have a detrimental impact on my business/livelihood	75	75	0
	Will have detrimental impacts on small businesses	151	151	0
	Concerns that costs of charging schemes will be passed onto residents/customers from businesses/services	133	131	2
	Funding/financial support should be provided to support the upgrading/replacing of vehicles	317	315	2
	Concerns about ability to pay charges/upgrade vehicles to be complaint/concerns about vehicles being devalued	1045	1044	1
	Concerns that businesses will relocate outside of London to avoid paying charges	54	54	0
	Concerns that residents will relocate outside of London to avoid paying charges	257	257	0
	Other comments about financial impacts of future road charging schemes	282	281	1

Social Impacts	Having and using a car is a necessity because of needs/cannot use other transport modes	983	981	2
	Public transport provisions are poor/not a viable alternative/safety concerns with using public transport	918	915	3
	Future charging schemes need to consider the cost of living/issues at the time impacting on finances	971	967	4
	Concerns charging schemes will have detrimental impacts on people's lives	492	491	1
	Concerns charging schemes will push people into/towards poverty	304	300	4
	Concerns charging schemes will force people out of employment/to change employment	120	120	0
	Concerns charging schemes will negatively impact those living outside of Greater London	59	59	0
	Concerns charging schemes will have negative impacts on mental health	132	131	1
	Concerns about data collection by ANPR/other data privacy concerns	136	136	0
	Will negatively impact on social/leisure activities/visiting friends and family/concerns about social isolation	319	318	1
	Other comments about social impacts	144	143	1
	<b>Total</b>	<b>18794</b>	<b>18643</b>	<b>151</b>

### C.3 Protected characteristics, other personal characteristics, and integrated impact assessment

Topic	Theme	All Respondents Count	Public Count	Stakeholder Count
Protected Characteristics	Comments about alternatives considered in the IIA	18	15	3
	Comment refers to disabled people/mobility issues	1909	1854	55
	Comment refers to age (younger and older people)	3567	3509	58
	Comment refers to ethnic groups/minorities	72	66	6
	Comment refers to low incomes/financially struggling	13108	12972	136
	Comment refers to vulnerable	737	700	37
	Comment refers to religion and/or belief	22	22	0
	Comment refers to sexual orientation	16	14	2
	Comment refers to gender/sex	147	139	8
	Comment refers to gender reassignment	3	3	0
	Comment refers to pregnancy and/or maternity	14	11	3
Personal Characteristics	Respondent identifies themselves as a sole trader/small business in their comment	532	527	5
	Respondent identifies themselves as an NHS worker	226	224	2
Integrated Impact Assessment	Comment about the integrated impact assessment (IIA) carried out for the consultation (general comments)	99	65	34
	Comment about the integrated impact assessment (IIA) carried out for the Mayor's Transport Strategy	18	14	4
	<b>Total</b>	17455	17266	189

## C.4 Comments about the consultation

Topic	Theme	All Respondents Count	Public Count	Stakeholder Count
Comments about the policy makers	Negative comments/criticism of the Mayor	11443	11423	20
	Positive comments/support of the Mayor	65	64	1
	Unfair to expand the ULEZ after the Mayor previously said this would not happen	106	104	2
	Negative comments/criticism of government	1933	1927	6
	Positive comments/support of government	39	39	0
	Negative comments/criticism of TfL	2455	2439	16
	Positive comments/support of TfL	43	40	3
General comments about consultation	Comment/comparison to other country / city	1235	1221	14
	Confusion/uncertainty whether vehicle/s will be impacted and charged by ULEZ	230	230	0
	Other comments (relevant but do not fit into code frame)	2346	2301	45
	Other out of scope comments	819	812	7
	Positive comments about consultation	28	28	0
	Negative comments about consultation (e.g. criticism)	1901	1874	27
	Other comments about consultation	125	109	16
	Comment about legally challenging the proposals	39	38	1
	Total	18093	17984	109

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