

Consultation on the Future of
the Western Extension –
Report on Attitudinal Survey
of London Businesses

Report

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EXECUTIVE SUMMARY

Introduction and Background

A Congestion Charging zone was initially introduced into central London in February 2003 and the zone was subsequently extended to the west in February 2007. The original charging zone and the Western Extension operate as a single area with an £8 daily charge being payable for vehicles driving within any part of the zone during charging hours (Monday to Friday 7am-6pm). Residents living within the charging area and some designated 'buffer zones' which are immediately adjacent to the boundary of the charging zone are eligible to register for a 90% discount from the Congestion Charge, which means they would pay £4 for five consecutive charging days.

The Mayor asked Transport for London (TfL) to seek Londoners' views on the future of the Western Extension of the Congestion Charging Scheme to help inform his decision on whether the Western Extension should remain as it is; be removed; or whether it should be altered. The Mayor will also take account of the views of stakeholders. The consultation took place from 1 September to 5 October 2008. This initial, non-statutory consultation would need to be followed by further statutory processes if any changes are to be made to the Western Extension.

The consultation materials stated that the very earliest that the Western Extension could be removed is at the end of 2009, but some changes to the scheme would require longer implementation timescales.

Since consultations tend to elicit views mainly from those with strong opinions, it is important to understand how representative these views are of the wider population. Therefore, TfL commissioned a survey of 2,000 Londoners and 1,000 businesses alongside the public consultation. These are designed to complement and inform the outcome of the public consultation by providing a representative view of specific groups, residents and businesses inside and beyond the original charging zone and Western Extension.

This report is on the Attitudinal Survey of London businesses. Separate reports on the Attitudinal Survey of Londoners and the public consultation are available.

Methodology

The Attitudinal Survey of London Businesses is designed to complement and inform the outcome of the public consultation by ascertaining the views on the future of the Western Extension (WEZ) from a representative sample of London businesses. It also enables an assessment of how representative the consultation findings are.

The survey was undertaken by telephone with a random sample of London businesses. The fieldwork for the survey took place between 8 and 11 September 2008 i.e. during week 2 of the consultation.

Accent purchased a large sample of telephone numbers representing London businesses in advance of the fieldwork and interviewers made up to four attempts to contact each number before using the next one.

A total of 1,005 interviews were conducted, 5 more than the target of 1,000.

- **WEZ** – businesses based within the Western Extension area 251
- **OCZ** – businesses based within the original charging zone 250
- **Rest of London** – businesses based outside both the original charging zone and the Western Extension 504
- **Total** 1,005

The data was weighted by business size (defined as number of employees). This was based on the ABI (Annual Business Inquiry), which is an annual survey of businesses carried out by the Office for National Statistics. It is also weighted by area so that it could be made representative of all London businesses (taking account of the geographical spread of the sample).

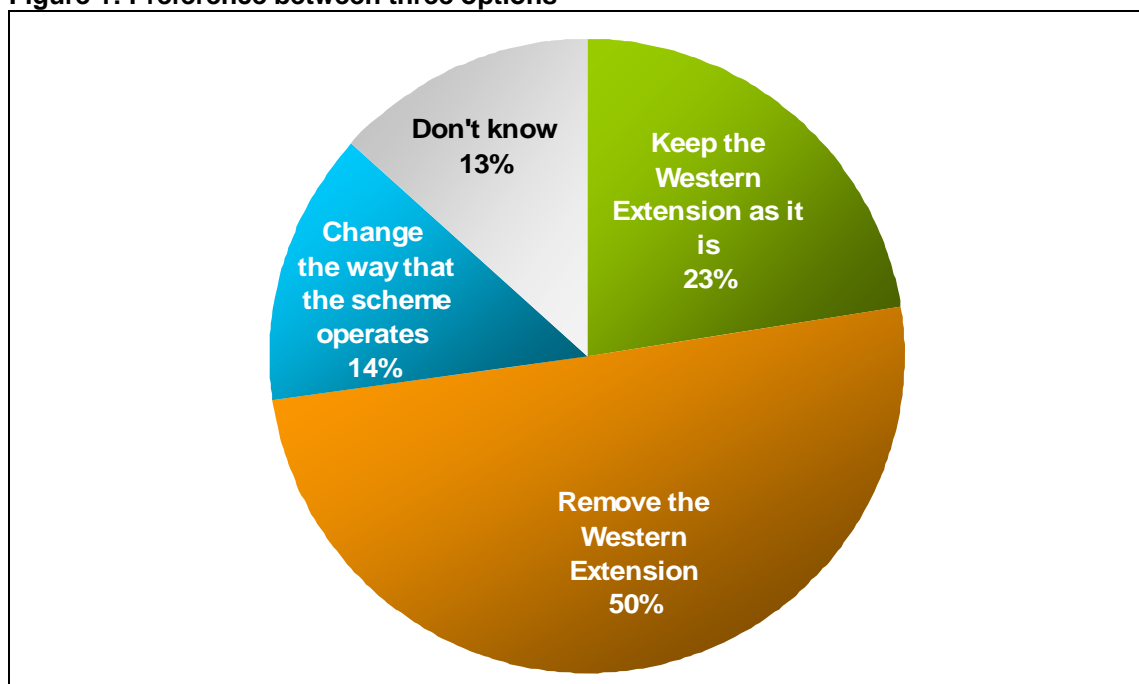
Main Findings

Respondents were asked to choose between the following three options:

- 1) Keep the Western Extension as it is
- 2) Remove the Western Extension so that there would no longer be any charge to drive in this area and residents of the Western Extension would no longer receive a discount on travel in the original charging zone
- 3) Change the way that the scheme operates.

Half of all London businesses chose 2) *Remove the Western Extension*, 23% chose 1) *Keep the Western Extension as it is* and 14% chose 3) *Change the way that the scheme operates*.

Figure 1: Preference between three options



Weighted base: 1,005 London businesses

Businesses located in the original charging zone were much more likely to prefer a) *Keep the Western Extension as it is* than businesses based in the WEZ or the rest of London (32% compared to 18% WEZ and 20% rest of London).

Respondents were then asked to what extent they supported or opposed the following three options for changing the way the scheme operates

***Option 3A** – Introduce an account based payment system across both the original charging zone and the Western Extension so that drivers can have the charge debited from an account automatically and would not have to worry about forgetting to pay the charge and getting a penalty charge. It would also allow residents to pay for a single charging day’s travel in the zone. Non account-holders would still be able to pay the charge via the existing payment channels.*

***Option 3B** – Introduce a charge-free period in the middle of the day in the Western Extension. However, driving in the original zone, or during charged hours in the Western Extension, would still cost £8.*

***Option 3C** – Increase the Residents’ Discount from 90% to 100% across both the original charging zone and the Western Extension so that residents would not be liable to pay the charge.*

Option 3A – Introduce an account-based payment system

The introduction of an account based payment system was relatively strongly supported with over half of all London businesses (58%) supporting it and less than half that number (21%) opposing it. The highest level of support was from businesses located in the OCZ (64%) with the lowest level of support from businesses located in the WEZ (54%). The larger the business (in terms of number of employees) the more likely they were to support an account based payment system (67% 50+ employees, 63% 11-49 employees and 56% 1-10 employees).

Option 3B – A charge-free period in the middle of the day in the Western Extension

On balance, there is greater support than opposition for a charge-free period in the middle of the day in the Western Extension: 40% of all London businesses supported and 36% opposed it.

Option 3C – Increase the Residents’ discount from 90% to 100%

There was strong support from London businesses for increasing the residents’ discount from 90% to 100% with about two thirds in support (66% of all London businesses strongly in support) and less than a fifth (18%) opposed.

1. INTRODUCTION

1.1 Background

Congestion Charging was initially introduced into central London in February 2003, and was subsequently extended to the west in February 2007, following consultation on both a revision to the Mayor’s Transport Strategy and a further consultation on a Variation Order to implement the extension.

The extended zone operates as single area with an £8 daily charge payable for vehicles driving within any part of the zone during charging hours (Monday to Friday 7am-6pm). Residents living within the charging area and some designated ‘buffer zones’ which are immediately adjacent to the boundary of the charging zone are eligible to register for a 90% discount from the Congestion Charge, which means they would pay £4 for five consecutive charging days. Businesses with ten or more vehicles registered with the Congestion Charging Fleet Scheme pay £6 per vehicle per day.

The Mayor asked Transport for London (TfL) to seek Londoners’ views on the future of the Western Extension of the Congestion Charging Scheme to help inform his decision on whether the Western Extension should remain as it is; be removed; or whether it should be altered. The Mayor will also take account of the views of stakeholders. The consultation took place from 1 September to 5 October 2008. This initial, non-statutory consultation would need to be followed by further statutory processes if any changes are to be made to the Western Extension.

The consultation materials stated that the very earliest that the Western Extension could be removed is at the end of 2009, but some changes to the scheme would require longer implementation timescales.

Figure 2: Map of Congestion Charging Zone



For the public consultation, TfL prepared an information leaflet and a questionnaire, which were available online and in paper form for the public and businesses to complete and submit. Open responses in the form of letters and emails were also accepted. Since consultations tend to elicit views mainly from those with strong opinions, it is important to understand how representative these views are of the wider population. Therefore, TfL has commissioned a survey of 2,000 Londoners and 1,000 businesses alongside the public consultation. This is designed to complement and inform the outcome of the public consultation by providing a representative view of specific groups, residents and businesses inside and beyond the original charging zone and Western Extension.

This report is on the Attitudinal Survey of businesses in London. Separate reports are available on the Attitudinal Survey of Londoners and the public consultation.

1.2 Objectives

The Attitudinal Survey of businesses was designed to complement and inform the outcome of the public consultation by ascertaining the views on the future of WEZ from a representative sample of London businesses and to assess how representative the consultation findings are.

The sample includes businesses in both the original charging zone and the Western Extension to the charging zone, as well as the rest of London.

2. METHODOLOGY

2.1 Introduction

The Attitudinal Survey was designed to complement and inform the outcome of the public consultation by ascertaining the views of a representative sample of London businesses on the future of the Western Extension. It was also intended to enable an assessment of how representative the consultation findings are.

The survey was undertaken by telephone with a random sample of London businesses.

The target sample was 1,000 interviews with businesses split as follows:

- Western Extension 250
- Original charging zone 250
- Rest of London 500

In addition, the sample was split by business size:

- Small 1-49 employees
- Medium 50-200 employees
- Large 200+ employees.

2.2 Methodology

The purpose of the survey was to identify London businesses' attitudes and opinions towards the options for the future of the Western Extension as set out in the consultation. It was also intended to assess how representative the consultation findings are.

The survey was undertaken by telephone with a random sample of businesses. The fieldwork for the survey took place between 8 and 11 September 2008 i.e. during week 2 of the consultation.

Accent purchased a large sample of businesses representing London businesses within the defined areas. The interviewing team was issued with the list and instructed to make up to four attempts to contact each number.

Potential respondents were phoned during business hours. Accent interviewers confirmed the address on recruitment. For businesses employing more than one person, the interviewer asked to speak to the person involved in making decisions about transport or finances that could affect the company or the services that the company offered. A few preliminary questions were asked to establish if the business met quotas based on area and business size.

If the respondent agreed to the interview and was found to be in scope, then the main questionnaire was undertaken. A total of 1,005 interviews were conducted, slightly exceeding the target of 1,000.

2.3 Questionnaire

The questionnaire was agreed with TfL prior to the start of the survey and as far as possible included the same questions as asked in the consultation questionnaires so that a comparison of results could be made.

In addition it included questions on business and travel characteristics and other aspects of congestion charging as shown below:

- Business characteristics:
 - Where business operates from
 - Nature of business
 - Business size
 - Company's profitability better or worse now than it was a year ago
 - Why company doing better/worse

- Travel characteristics:
 - How staff travel to work
 - How customers, clients, visitors travel to business

- Charging zone:
 - Whether company operates vehicles in the original charging zone (OCZ) and the Western Extension zone (WEZ) in charging hours
 - How many vehicles company operates in OCZ and WEZ in charging hours
 - How often company pays the Congestion Charge for vehicles driving in the original charging zone/Western Extension
 - Whether company registered with the Congestion Charging Fleet Scheme
 - Whether staff drive into or within the Western Extension zone to do business in charging hours
 - Whether customers, clients or visitors drive into or within the Western Extension zone to do business in charging hours
 - Whether deliveries made to business by car, lorry or van that drive into or within the Western Extension zone to do business in charging hours

- Consultation on WEZ:
 - Awareness

The questionnaire was similar to the questionnaire for the public consultation but also included specific business related questions such as:

- Business type
- Business size (staff/sites)
- Vehicles used (including numbers of vehicles by category)
- Frequency of business vehicle use within WEZ, OCZ and elsewhere in London
- Recent performance of the business and external factors affecting profitability.

On average, the questionnaire took approximately ten minutes to conduct, depending on the length of answers.

2.4 Survey Instrument

For the telephone research Accent used Computer-Aided Telephone Interviewing (CATI), using Accent's own computer survey software – *Accis*.

CATI offers a number of advantages including automatic routing, which simplifies the interviewer's task and minimises potential error. Also, by removing the need for a separate coding and data entry phase, the accuracy of the data is improved.

2.5 Data Weighting

Data weighting is a procedure which is frequently used when analysing market research survey data. Weighting systematically adjusts the data to ensure the survey results are very closely representative of the population in question, in terms of key characteristics. The method matches the sample to existing sources of information on the structure of the whole population being surveyed. This section describes the method of weighting used for this survey.

At the analysis stage, the sample was weighted to size of business so that it was representative by the size of businesses in each of the sampling areas (Western Extension, Original Charging Zone and rest of London).

In addition for data that was representative of all London Businesses a further set of weights was applied so that the overall sample was representative of the geographical spread of businesses in London.

Details of the weighting procedures follows.

Weighting by Business Size

The sample was split by the following business sizes as specified in the brief:

- Small: 1-49 employees
- Medium: 50-199 employees
- Large: 200+ employees.

The achieved sample breakdown by these business sizes is shown in Table 1 below.

Table 1: Sample breakdown by business size

	Total %	Original charging zone %	Western Extension %	Rest of London %
1-49 employees	85	72	88	91
50-199 employees	10	21	8	6
200+ employees	4	7	3	3
Base*	994	248	250	496

* after excluding don't knows

Data on size of business is from the ABI (Annual Business Inquiry). The ABI¹ is an annual sample survey carried out by the Office for National Statistics. The data shown is from September 2006.

Table 2: Sample breakdown by business size

	Total %	Original charging zone %	Western Extension %	Rest of London %
1-10 employees	87.0	82.7	86.7	88.4
11-49 employees	9.8	12.7	10.3	8.9
50-199 employees	2.5	3.4	2.4	2.2
200+ employees	0.7	1.2	0.6	0.5
Base*	381,707	83,438	21,942	276,327

* after excluding don't knows

The ABI uses business size by number of employees, based on business units (as was done in the questionnaire). Therefore, for example, a major supermarket chain in London will not be assigned to a size band based on the size of the parent company, but instead will be assigned based on the size of the branch.

The ABI figures have more small businesses and fewer larger companies than the sample used in the survey and therefore the weights are relatively small for companies of over 50 employees.

Table 3: Targets

	Original charging zone %	Western Extension %	Rest of London %
1-49 employees	95.4	97.0	97.3
50-199 employees	3.4	2.4	2.2
200+ employees	1.2	0.6	0.5
Base	83,438	21,942	276,327

Table 4: Weights by business size by area

	Original charging zone	Western Extension	Rest of London
1-49 employees	1.33	1.10	1.07
50-199 employees	0.16	0.30	0.37
200+ employees	0.17	0.20	0.17

Weighting by Area

The business sample comprised 1,005 interviews structured as follows:

- Western Extension (WEZ) 251 (target = 250)
- Original charging zone (OCZ) 250 (target = 250)
- Rest of London 504 (target = 500)
- **Total 1,005 (target = 1,000)**

The data was also weighted so that it could be considered representative of all London Businesses (taking account of the geographical spread of the sample). As the samples

¹ Notes on survey are available here:

<http://www.statistics.gov.uk/about/data/guides/labourmarket/sources/business/businquiry.asp>

above indicate, half of the overall sample (the total of the WEZ and OCZ) was in the Congestion Charging zone, and the remaining half the rest of London. This clearly overstates the proportion of businesses in the Congestion Charging Zone, which is a relatively small area within Greater London. While a relatively large sample of businesses in the Congestion Charging Zone (WEZ and OCZ) is desirable for finding out about the views of businesses in those groups as discrete areas, there needs to be an adjustment in order to gain a representative picture of London businesses overall. Therefore, it was necessary to downweight the data from the Western Extension and the Original charging zone and upweight the data from the rest of London. Details of the weights by location are shown below.

Data on the numbers of business units for the Western Extension, the Original Charging Zone and all of London businesses from the ABI (Annual Business Inquiry) show that 22% of businesses are in the Original charging zone, 6% in the Western Extension and 72% in the rest of London.

	Number of units	As a % of London units
• Original charging zone	83,438	21.9%
• Western Extension	21,942	5.7%
• Rest of London	276,327	72.4%
• Total	381,707	100%

Therefore, for the overall London data we weighted the sample by the following weights:

• Original charging zone	0.88
• Western Extension	0.23
• Rest of London	1.44

2.6 Margins of Error

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

The confidence with which we can make this prediction is usually chosen to be 95% – that is, the chances are 19 in 20 that the ‘true’ value will fall within a specified range. The predicted ranges for different percentages results at the ‘95% confidence interval’ are shown for the weighted data representing all businesses. For example, where 50% of all businesses give a particular answer, the margin of error/specified range will be plus or minus 1.4 per cent, ie between 48.6% and 51.6%.

For the weighted data representing all London businesses the percentages shown in the report it can be said with 95% confidence that the true proportions are within the following margins of error:

- 50% giving the same response $\pm 2.0\%$
- 40% or 60% giving the same response $\pm 2.0\%$
- 30% or 70% giving the same response $\pm 1.9\%$
- 20% or 80% giving the same response $\pm 1.6\%$
- 10% or 90% giving the same response $\pm 1.2\%$.

The charts and tables in this report show data rounded up to the nearest whole number. So, for example, 8.5% is rounded to 9% and 8.4 is rounded to 8%. This means that in some of the charts and tables the totals do not add to 100%.

2.7 Pilot

In order to test the questionnaire and the survey methodology a pilot survey of ten interviews was conducted on 2 September 2008. The pilot was designed to test:

- the recruitment process
- the clarity and flow of the questionnaire
- the appropriateness of the language used
- the accuracy of all routings
- the interview duration
- the sample hit rate.

Accent prepared a short report on the pilot which included some recommended changes. The full questionnaire that was used in the survey is at Appendix A of this report, and the pilot survey used to test the questionnaire is provided at Appendix C.

These changes included, for example, some minor changes to wording in order to improve the flow of the survey and adding some diagnostic questions to ask respondents about why they opposed certain options.

A report on the pilot is included as Appendix C.

3. FINDINGS

3.1 Introduction

The data in the report is presented by the three sampling areas:

- Western Extension
- Original charging zone
- Rest of London.

These data are weighted to employee size within each area.

In addition this report shows data for all London businesses. This is also weighted by business size and also by the proportions of businesses in each area so is representative of all London businesses.

The tables and figures in this report show the following names for the areas for businesses. The explanation for each of the areas is shown after the name:

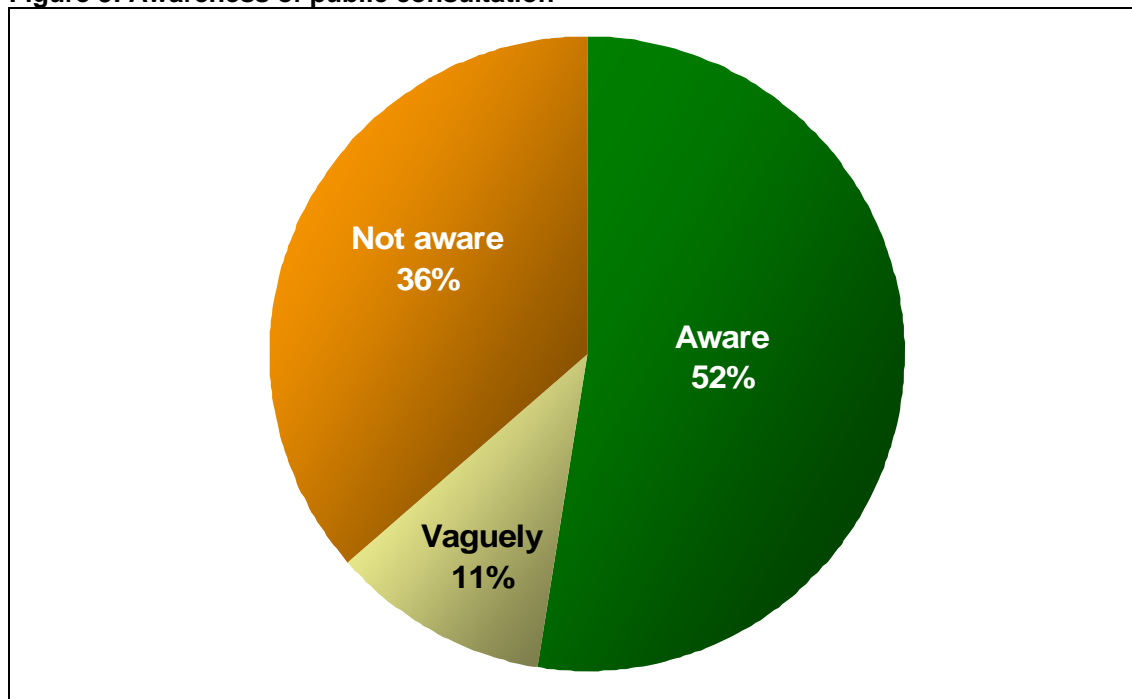
- **WEZ** – businesses based within the Western Extension area
- **OCZ** – businesses based within the original charging zone
- **Rest of London** – businesses based outside both the original charging zone and the Western Extension

3.2 Awareness of Consultation

Respondents were asked how aware they were of the public consultation on the Western Extension.

Over half of London businesses (63%) were aware or vaguely aware. See Figure 3 below.

Figure 3: Awareness of public consultation



Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Businesses based in the WEZ were more likely to be aware than those based elsewhere.

Table 5: Awareness of public consultation by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
Aware	52	61	54	51
Vaguely aware	11	12	12	11
Not aware	36	26	35	38
Don't know	*	*	0	0
Weighted base	1,005	251	250	504

* = less than 0.5%

Note: figures may not add to 100% because of rounding

Table 6: Awareness of public consultation by company size

	1-10 employees %	11-49 employees %	50+ employees %
Aware	53	52	49
Vaguely aware	12	9	10
Not aware	35	39	42
Don't know	*	0	0
Weighted base	707	266	31

* = less than 0.5%

Note: figures may not add to 100% because of rounding

3.3 Response to Three Options

Those who stated that they were not aware of the consultation were read the following text before the any further questions were asked:

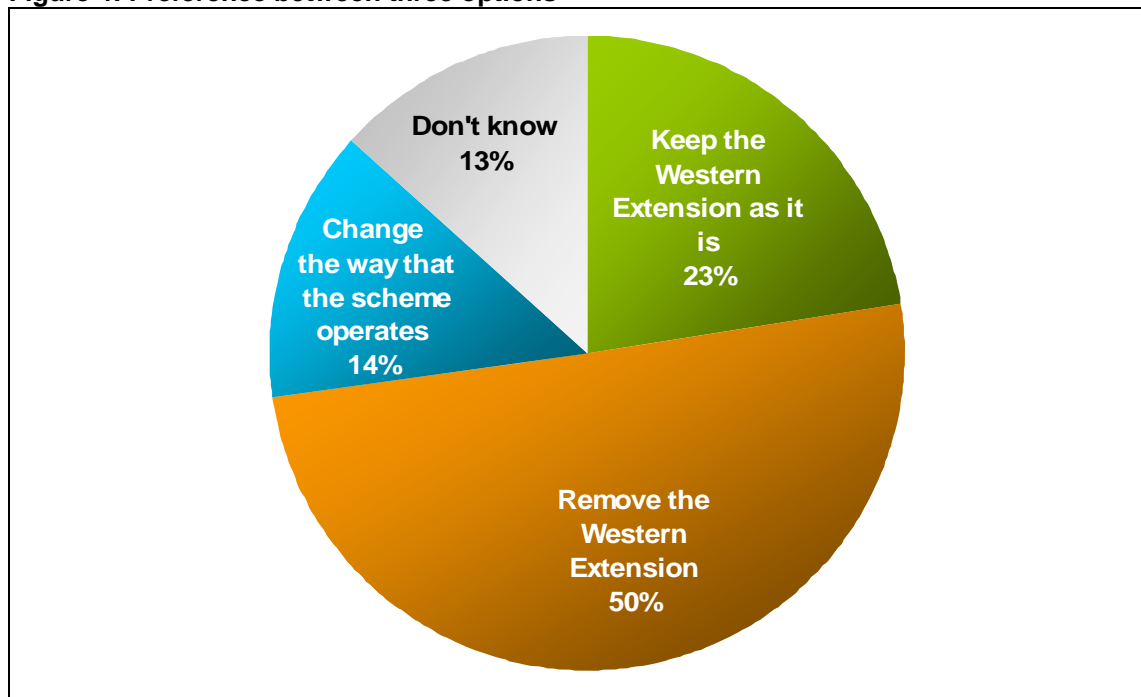
“The consultation is about what should happen with the Western Extension: whether it should be retained in its present form, removed, or changed. The options for change are: introducing payment accounts to make it easier to pay the charge; a charge-free period in the middle of the day and an increase to the residents’ discount.”

All respondents (both those who were aware of the consultation and those who said they were not) were then asked what they thought should happen to the Western Extension of the Congestion Charging zone and read out the following three options:

- 1) Keep the Western Extension as it is
- 2) Remove the Western Extension so that there would no longer be any charge to drive in this area and residents of the Western Extension would no longer receive a discount on travel in the original charging zone
- 3) Change the way that the scheme operates.

Overall, half of all London businesses chose 2) *Remove the Western Extension*, 23% chose 1) *Keep the Western Extension as it is*; and 14% chose 3) *Change the way that the scheme operates*.

Figure 4: Preference between three options

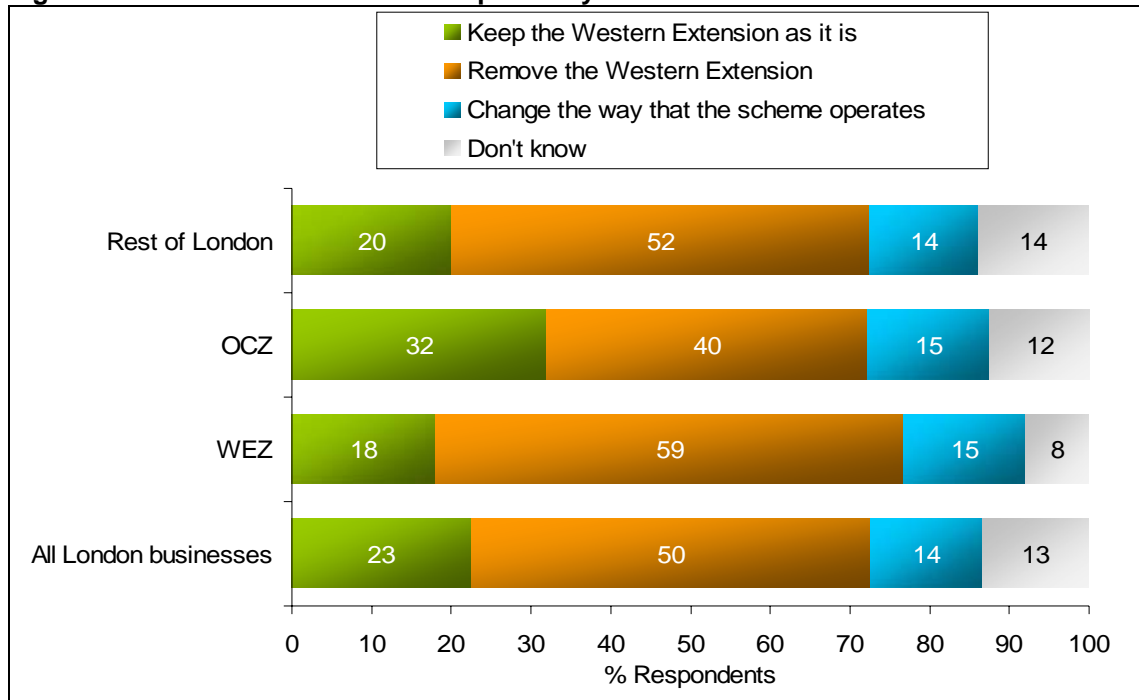


Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Analysis by location shows that businesses based in the original charging zone were much more likely to prefer 1) *Keep the Western Extension as it is* than businesses based in the WEZ or the rest of London (32% of OCZ businesses chose this option).

Figure 5: Preference between three options by area

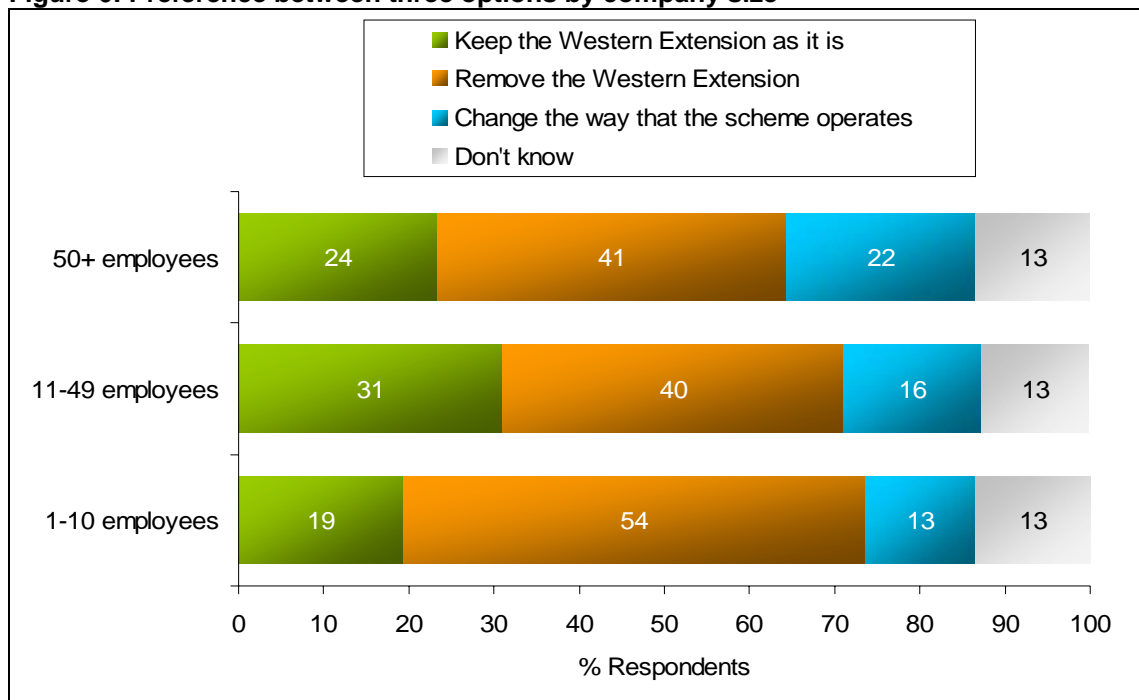


Weighted base: 1,005 London businesses, 251 WEZ, 250 OCZ, 504 Rest of London

Note: figures may not add to 100% because of rounding

Small businesses (employing 1-10) were much more likely than large businesses to support 2) *Remove the Western Extension*.

Figure 6: Preference between three options by company size



Weighted base, 707 1-10 employees, 266 11-49 employees, 31 50+ employees

Note: figures may not add to 100% because of rounding

Below we show preferences between the options by:

- Size of business for businesses based in WEZ
- Frequency business pays Congestion Charge for driving into or within WEZ (regardless of where they are based)²

Businesses that pay the Congestion Charge for driving into or within the WEZ were much more likely to choose 2) *Remove the Western Extension* than businesses that do not pay the Congestion Charge for driving into or within the WEZ, particularly those that pay the Congestion Charge once a week or more: 66% compared to 60% less than once a week and 46% never.

Table 7: Preference between three options by size of business for businesses based in WEZ and frequency business pays Congestion Charge for driving into or within WEZ (all businesses)

	1) Keep the Western Extension as it is %	2) Remove the Western Extension %	3) Change the way that the scheme operates %	Don't know %	Weighted base
Businesses based in WEZ by size of business					
1-10 Employees	18	57	17	8	194
11-49 Employees	20	64	8	8	57
50+ Employees	22	62	14	3	6
Frequency business pays Congestion Charge for driving into or within WEZ (all businesses)					
Once a week or more often	13	66	16	6	179
Less often than once a week	18	60	9	13	68
Never	25	46	14	15	723

Note: base sizes for business size in WEZ show sample size **before** weighting down. After weighting down so they represent overall London proportion they are: 43 for 1-10 employees, 13 for 11-49 employees and 2 for 50+ employees

The next part of the survey asked respondents how far they supported or opposed options for changing the way that the scheme operates.

² Note: this is based on businesses who pay the Congestion Charge and travel in the WEZ

Option 3A – Introduce an account-based payment system

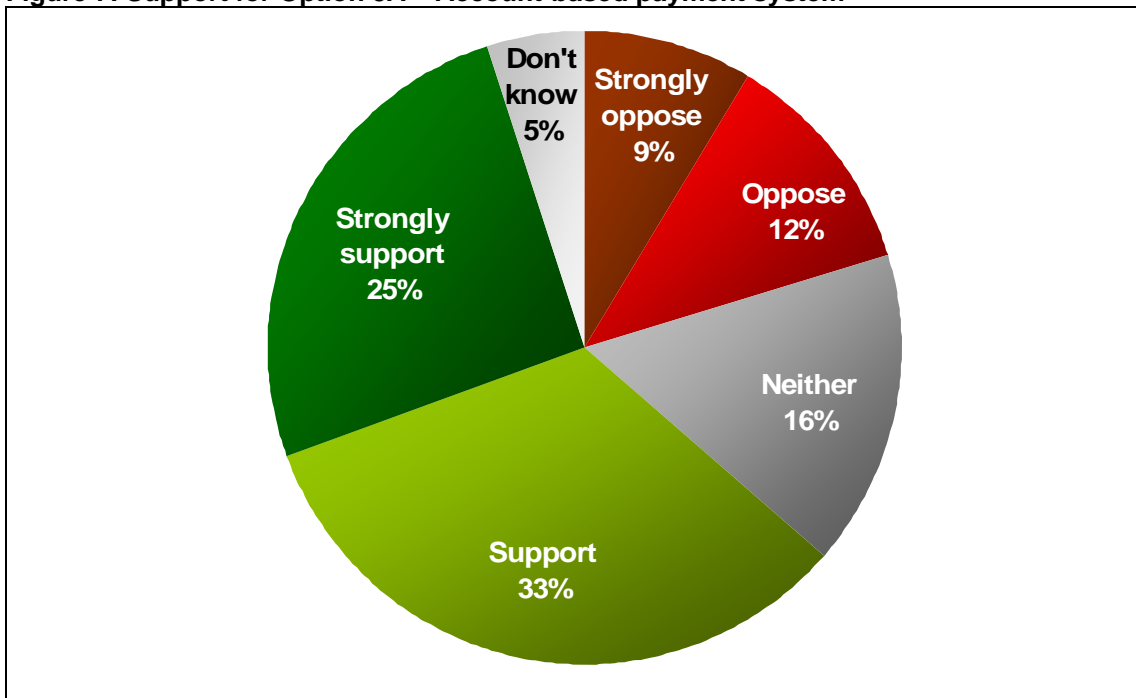
Respondents were asked the following:

“With regard to changing the way that the scheme operates, I would like you to say how much you support or oppose each of the following three options on a scale of 1 to 5, where 1 = ‘strongly support’ and 5 = ‘strongly oppose’.

Option A) Introduce an account based payment system across the both the original charging zone and the Western Extension so that drivers can have the charge debited from an account automatically and would not have to worry about forgetting to pay the charge and getting a penalty charge. It would also allow residents to pay for a single charging day’s travel in the zone. Non account-holders would still be able to pay the charge via the existing payment channels.”

The introduction of an account based payment system was relatively strongly supported with over half of all London businesses (58%) supporting it and less than half that number (21%) opposing it.

Figure 7: Support for Option 3A – Account-based payment system

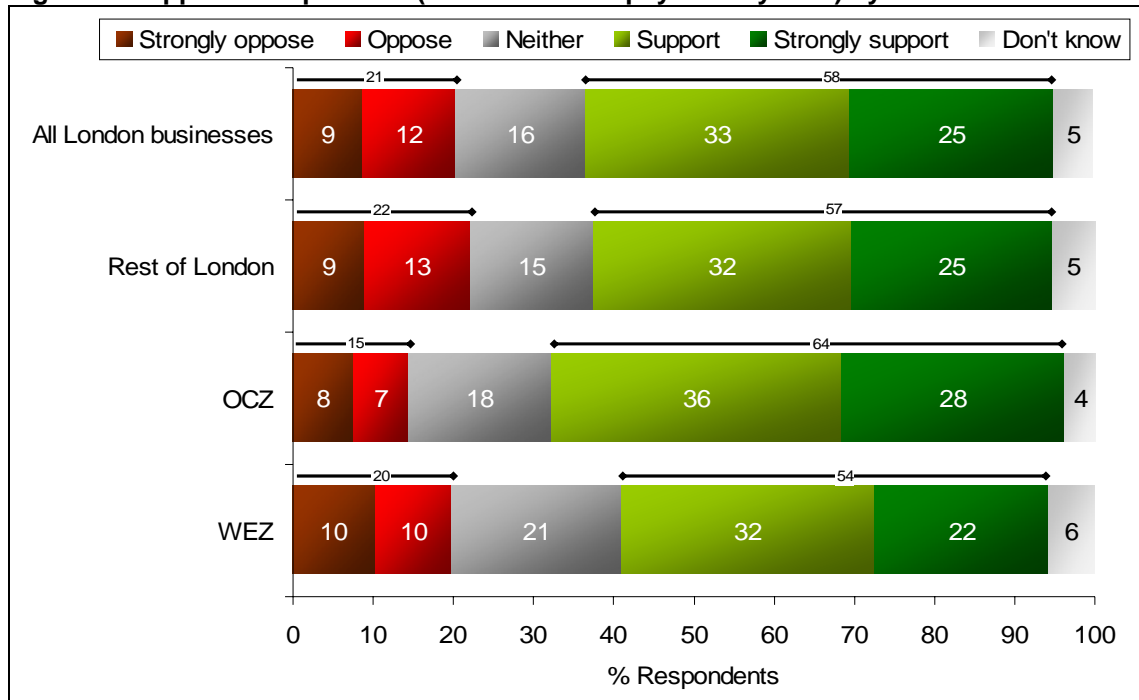


Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Analysis by area shows the highest level of support for an account based payment system was from businesses located in the OCZ with the lowest level of support from businesses located in the WEZ.

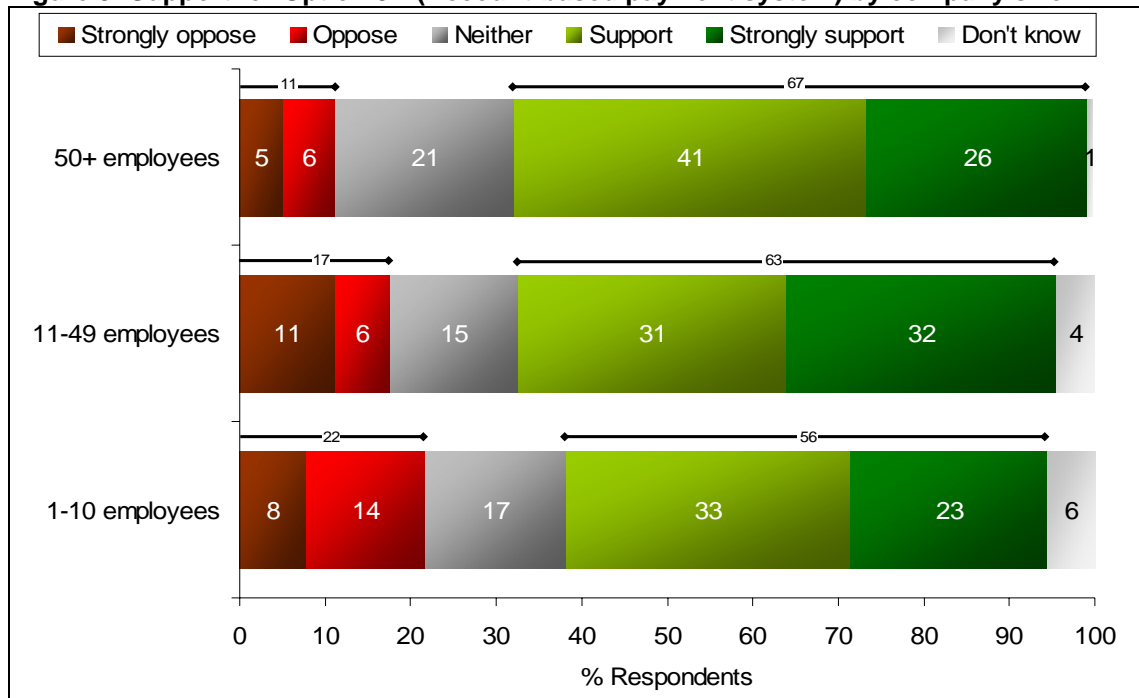
Figure 8: Support for Option 3A (Account-based payment system) by area



Weighted base: 1,005 London businesses, 251 WEZ, 250 OCZ, 504 Rest of London
 Note: figures may not add to 100% because of rounding

The larger the business (in terms of number of employees) the more likely they were to support an account based payment system.

Figure 9: Support for Option 3A (Account-based payment system) by company size



Weighted base, 707 1-10 employees, 266 11-49 employees, 31 50+ employees
 Note: figures may not add to 100% because of rounding

The table below shows support for Option 3A by:

- Size of business for businesses based in WEZ
- Frequency business pays Congestion Charge for driving into or within WEZ (regardless of where they are based)³

Businesses that pay the Congestion Charge for driving into or within the WEZ (regardless of where the business is based) were more likely to support an account based payment system than businesses that do not pay the Congestion Charge for driving into or within the WEZ: 64% that pay the Congestion Charge for driving into or within the WEZ once a week or more and 61% less than once a week compared to 57% never pay the Congestion Charge for driving into or within the WEZ.

Table 8: Support for Option 3A (Account-based payment system) by size of business for businesses based in WEZ and frequency business pays Congestion Charge for driving into or within WEZ (all businesses)

	Strongly oppose %	Oppose %	Neither %	Support %	Strongly support %	Don't know %	Weighted base
Businesses based in WEZ by size of business							
1-10 Employees	9	8	23	33	21	7	194
11-49 Employees	14	16	14	28	26	2	57
50+ Employees	8	11	20	38	23	0	6
Frequency business pays Congestion Charge for driving into or within WEZ (all businesses)							
Once a week or more often	9	12	13	30	34	2	179
Less often than once a week	3	20	13	30	31	2	68
Never	9	11	18	34	23	6	723

Note: base sizes for business size in WEZ show sample size **before** weighting down. After weighting down so they represent overall London proportion they are: 43 for 1-10 employees, 13 for 11-49 employees and 2 for 50+ employees

The 21% (203 respondents) of respondents who were opposed or strongly opposed to Option 3A were asked why. The open-ended responses were assigned to one of the following codes.

- Don't trust Transport for London (TfL) with account details/money
- Like existing payment channels
- Should not be compulsory
- Privacy concerns / 'Big brother'
- Might cost more/ need for minimum balance.

The interviewer did not offer this list of possible reasons to the respondent. Any responses which could not be assigned to a code were typed in full. These 'other' responses were then 'hand analysed' and assigned codes if they represented more than 1% of responses. More than one response could be given and all responses were coded.

³ Note: this is based on businesses who pay the Congestion Charge and travel in the WEZ

The main reason was a lack of trust of TfL in keeping account details and/or money (mentioned by 30% of those who opposed the introduction of accounts), representing 6% of all London businesses). Also important were concerns about accounts being compulsory (19%, 4% of all London businesses) and privacy concerns (11%, 2% of all London businesses). Over a fifth (21%, 4% of all London businesses) said that they did not support the Congestion Charge.

Table 9: Reasons for opposing Option 3A (Account-based payment system) by where business is based

	All London businesses %	WEZ %	OCZ %	Rest of London %
Don't trust TfL with account details/money	30	28	35	30
I don't support Congestion Charging	21	20	29	20
Should not be compulsory	19	25	17	19
Like existing payment channels	11	14	10	11
Privacy concerns / 'Big brother'	11	7	9	12
Might cost more/ need for minimum balance	11	13	14	10
Does not help businesses/of no benefit to us	2	11	0	2
Unnecessary change/doesn't address problems with WEZ	3	7	4	3
I don't like using direct debits	1	2	0	1
Other	7	4	7	7
Weighted base	203	51	32	117

Note: More than one response could be given so figures add to more than 100%

Base: those who oppose Option 3A

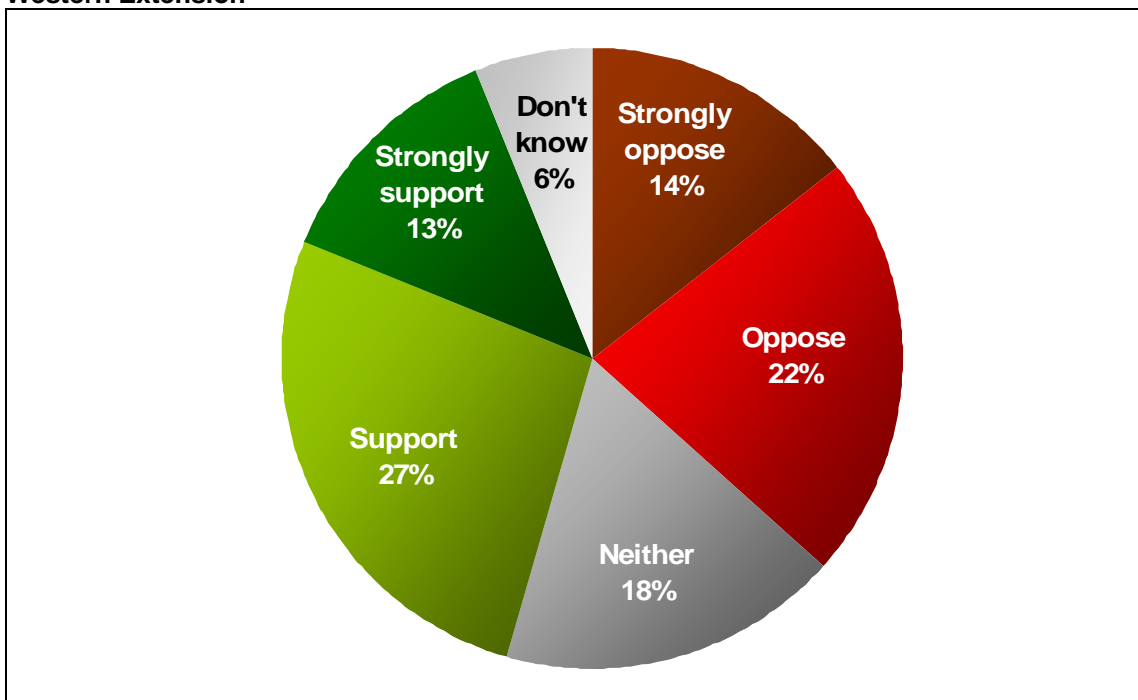
Option 3B – Introduce a charge-free period in the middle of the day in the Western Extension

Option 3B was described as follows:

“Introduce a charge-free period in the middle of the day in the Western Extension. However, driving in the original zone, or during charged hours in the Western Extension, would still cost £8.”

On balance, there was slightly greater support than opposition for a charge-free period in the middle of the day in the Western Extension: 40% supported and 36% opposed it, amongst London businesses overall.

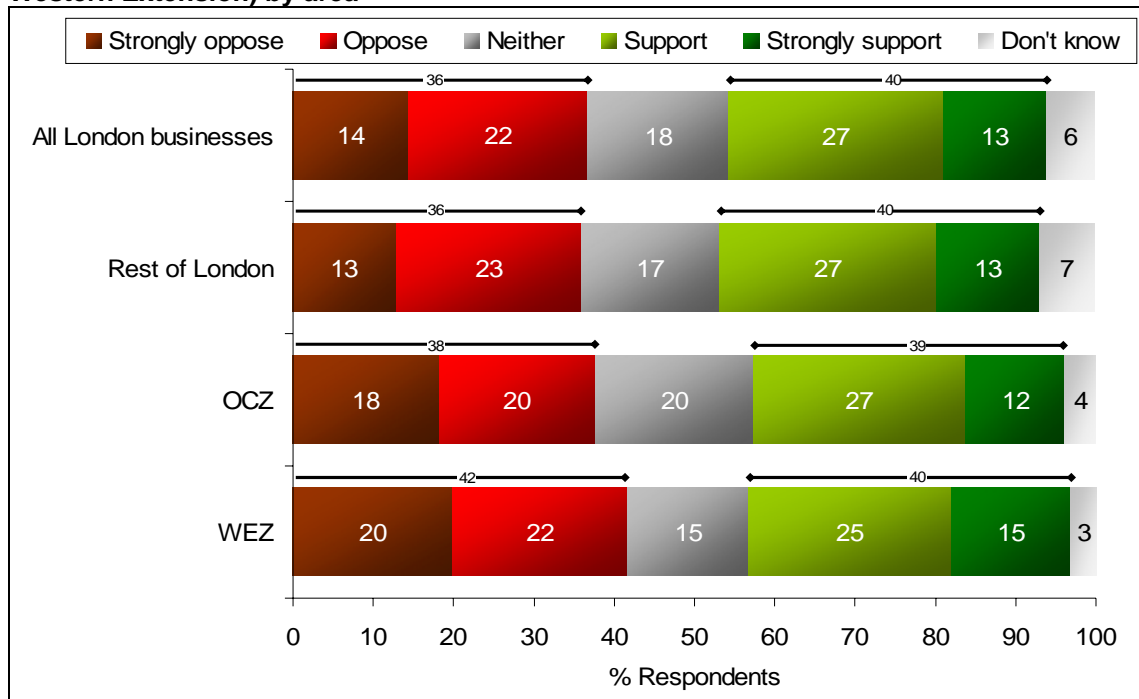
Figure 10: Support for Option3B – a charge-free period in the middle of the day in the Western Extension



Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Figure 11: Support for Option 3B (a charge-free period in the middle of the day in the Western Extension) by area

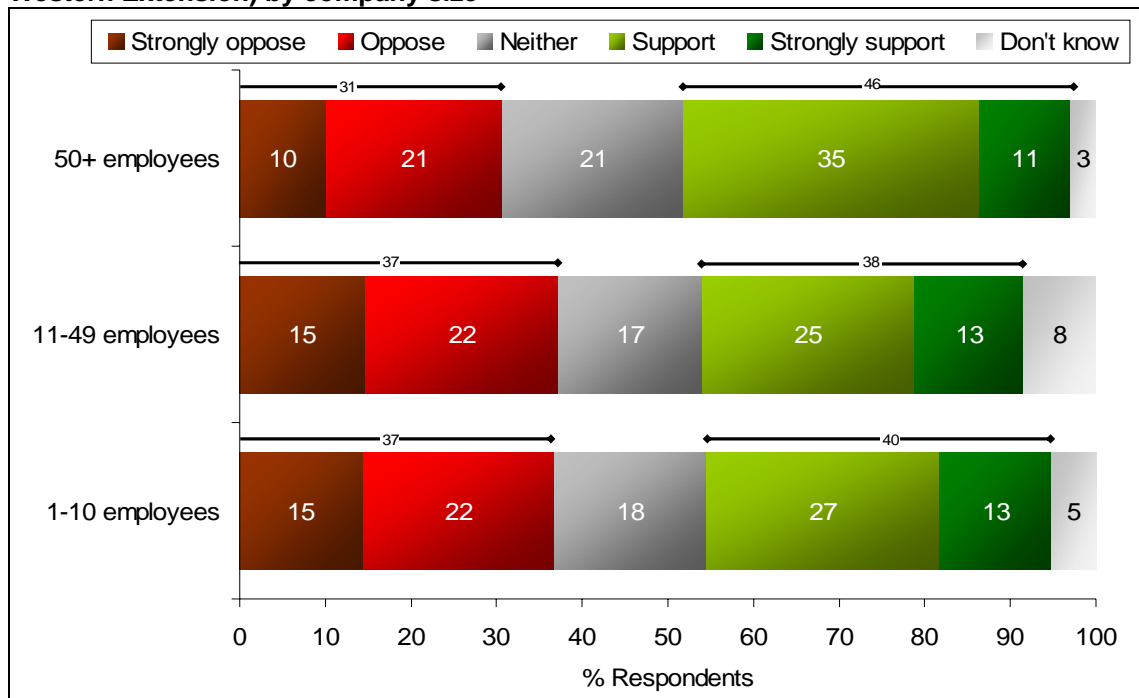


Weighted base: 1,005 London businesses, 251 WEZ, 250 OCZ, 504 Rest of London

Note: figures may not add to 100% because of rounding

Businesses with more than 50 employees were more likely to support a charge-free period in the middle of the day in the Western Extension than smaller businesses.

Figure 12: Support for Option 3B (a charge-free period in the middle of the day in the Western Extension) by company size



Weighted base, 707 1-10 employees, 266 11-49 employees, 31 50+ employees

Note: figures may not add to 100% because of rounding

The table below shows support for Option 3B by:

- Size of business for businesses based in WEZ
- Frequency business pays Congestion Charge for driving into or within WEZ (regardless of where they are based).⁴

Table 10: Support for Option 3B (a charge-free period in the middle of the day in the Western Extension) by size of business for businesses based in WEZ and frequency business pays Congestion Charge for driving into or within WEZ (all businesses)

	Strongly oppose %	Oppose %	Neither %	Support %	Strongly support %	Don't know %	Weighted base
Businesses based in WEZ by size of business							
1-10 Employees	20	21	15	25	16	3	194
11-49 Employees	20	24	16	26	10	4	57
50+ Employees	11	24	21	28	15	0	6
Frequency business pays Congestion Charge for driving into or within WEZ (all businesses)							
Once a week or more often	17	25	19	30	9	0	179
Less often than once a week	22	26	17	19	15	2	68
Never	13	21	18	27	14	8	723

Note: base sizes for business size in WEZ show sample size **before** weighting down. After weighting down so they represent overall London proportion they are: 43 for 1-10 employees, 13 for 11-49 employees and 2 for 50+ employees

The 36% (369 respondents) who were opposed or strongly opposed to Option 3B were asked why. The open-ended responses were assigned to one of the following codes.

- Would make congestion / traffic worse
- Not middle of day
- Too confusing for drivers
- Not just Western Extension – should be whole zone.

The interviewer did not offer this list of possible reasons to the respondent. Any responses which could not be assigned to a code were typed in full. These ‘other’ responses were then ‘hand analysed’ and assigned codes if they represented more than 1% of responses. More than one response could be given and all responses were coded.

⁴ Note: this is based on businesses who pay the Congestion Charge and travel in the WEZ

The main reasons were that it would make congestion/traffic worse (mentioned by 33% of those who opposed Option 3B, representing 12% of all London businesses) and that it was too confusing for drivers (31%, 11% of all London businesses).

Table 11: Reasons for opposing Option 3B (a charge-free period in the middle of the day in the Western Extension) by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
Would make congestion / traffic worse	33	34	33	34
Too confusing for drivers	31	32	26	32
I don't support Congestion Charging	15	12	14	16
Not middle of day	7	6	6	8
Not just Western Extension - should be whole zone	6	1	10	6
It would make no difference	6	9	4	7
Undermines the purpose of Congestion Charging	2	2	6	1
Damaging to business	2	2	3	2
It would not benefit morning/evening drivers	1	3	0	1
Would complicate scheme administration/too expensive to run	1	2	0	2
Other	5	6	8	4
Weighted base	369	108	82	190

Note: More than one response could be given so figures add to more than 100%

Base: those who oppose Option 3B

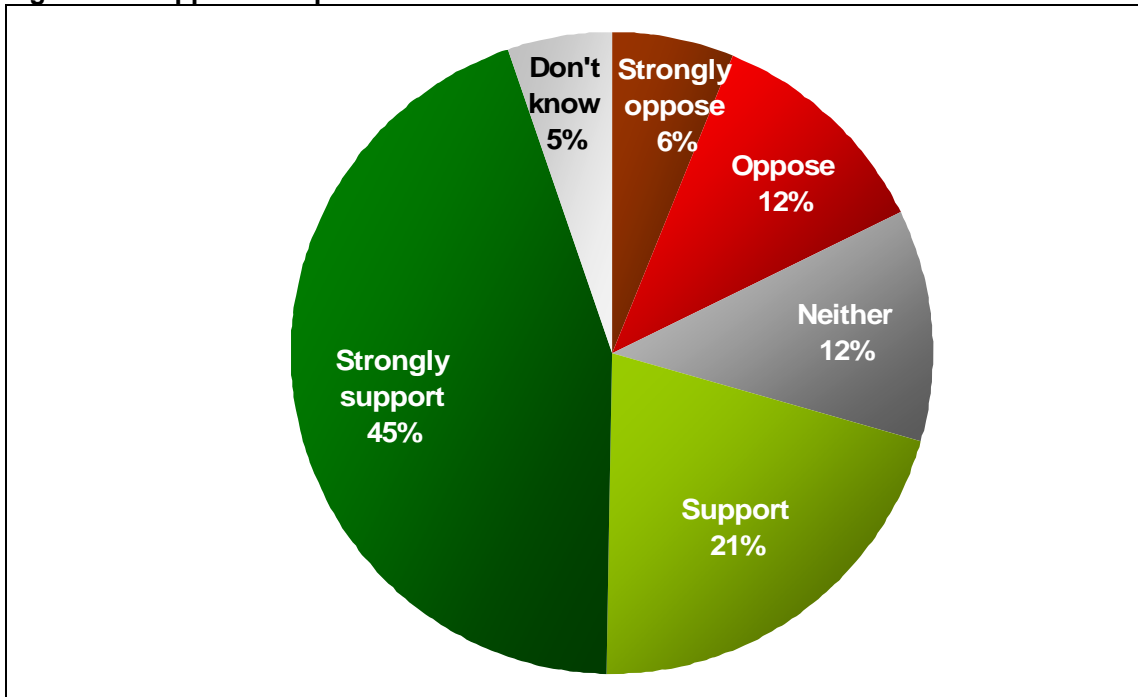
Option 3C – Increase the Residents’ discount from 90% to 100%

Option 3C was described as follows:

“Increase the Residents’ discount from 90% to 100% across both the original charging zone and the Western Extension so that residents would not be liable to pay the charge.”

There was a high level support from London businesses for increasing the residents’ discount from 90% to 100% with about two thirds in support (45% strongly in support) and less than a fifth (18%) opposed.

Figure 13: Support for Option 3C – increase the Residents’ discount from 90% to 100%

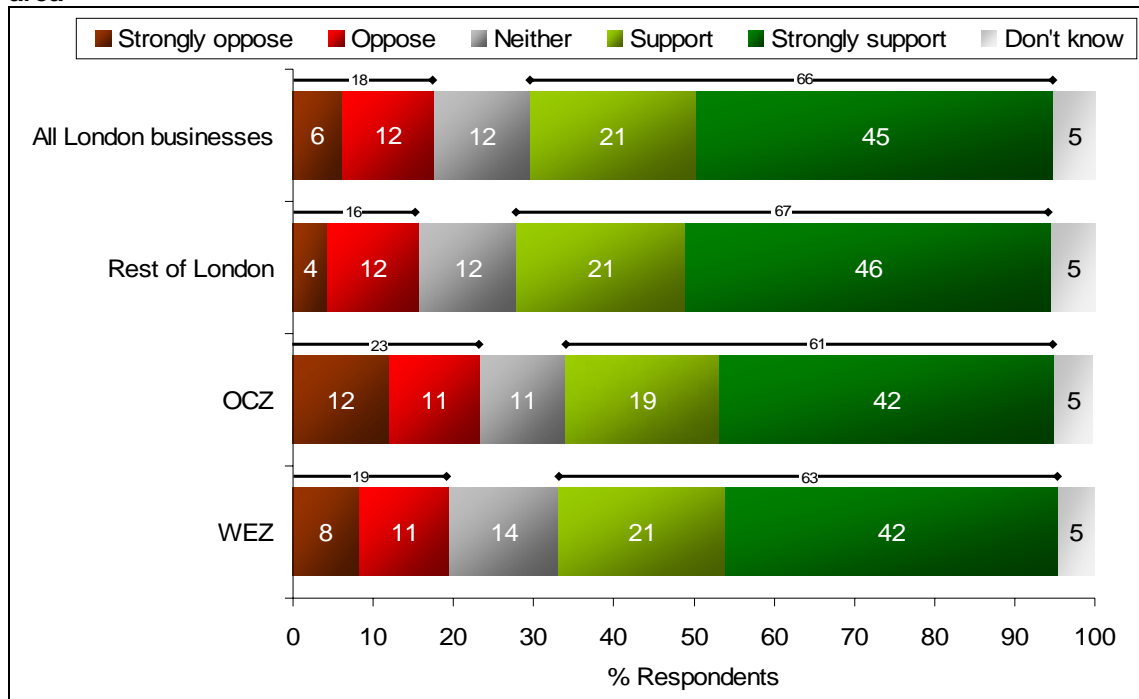


Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Analysis by area shows the highest level of support for increasing the residents’ discount from 90% to 100% from businesses based outside the charging zone.

Figure 14: Support for Option 3C (increase the Residents' discount from 90% to 100%) by area

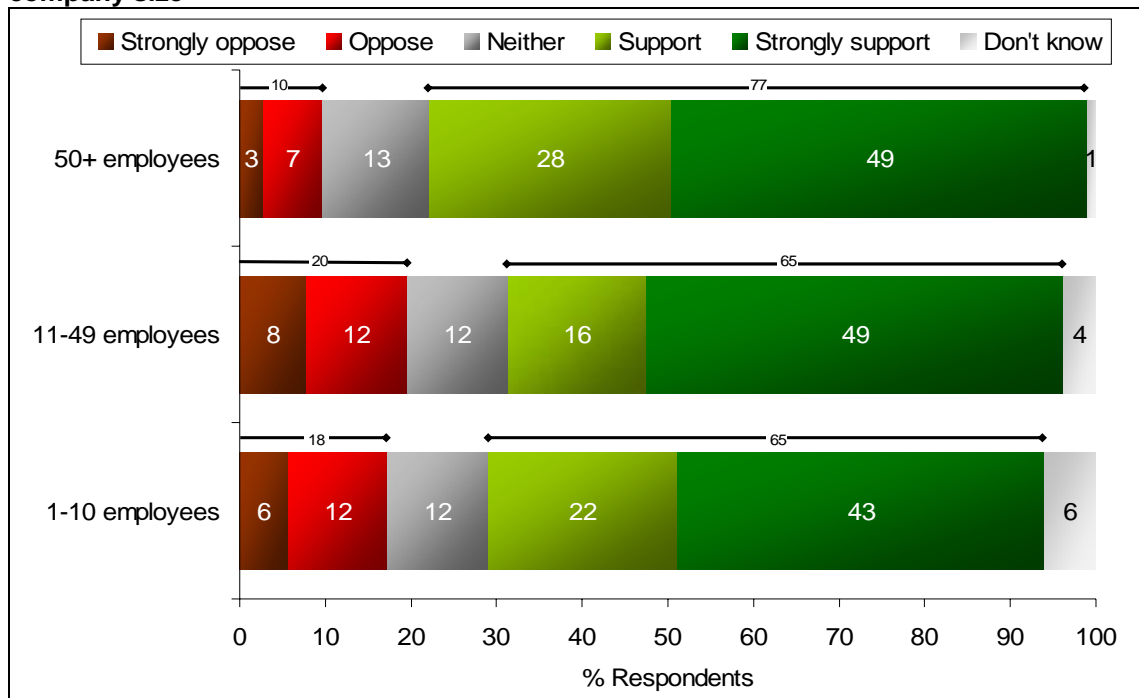


Weighted base: 1,005 London businesses, 251 WEZ, 250 OCZ, 504 Rest of London

Note: figures may not add to 100% because of rounding

Businesses with more than 50 employees were more likely to support increasing the Residents' discount from 90% to 100% than smaller businesses.

Figure 15: Support for Option 3C (increase the Residents' discount from 90% to 100%) by company size



Weighted base, 707 1-10 employees, 266 11-49 employees, 31 50+ employees

Note: figures may not add to 100% because of rounding

The table below shows support for Option 3C by:

- Size of business for businesses based in WEZ
- Frequency business pays Congestion Charge for driving into or within WEZ (regardless of where they are based).⁵

Although larger businesses (employing more than 50 employees) in all of London were more likely than smaller businesses to support increasing the residents' discount from 90% to 100%, for businesses based in the Western Extension support is much more even, with 63% of businesses with 1-10 employees supporting and 18% opposing compared to 66% and 24% respectively for businesses with 50+ employees.

Businesses that do not pay the Congestion Charge for driving into or within the WEZ (regardless of where the business is based) were slightly more likely to support increasing the residents' discount from 90% to 100% than businesses that pay the Congestion Charge for driving into or within the WEZ: 68% compared to 59%.

Table 12: Support for Option 3C (increase the Residents' discount from 90% to 100%) by size of business for businesses based in WEZ by and frequency business pays Congestion Charge for driving into or within WEZ (all businesses)

	Strongly oppose %	Oppose %	Neither %	Support %	Strongly support %	Don't know %	Weighted base %
Businesses based in WEZ by size of business							
1-10 Employees	7	11	15	20	43	4	194
11-49 Employees	12	14	10	22	38	4	57
50+ Employees	10	14	6	37	29	4	6
Frequency business pays Congestion Charge for driving into or within WEZ (all businesses)							
Once a week or more often	10	16	13	17	42	3	179
Less often than once a week	7	7	22	19	40	4	68
Never	5	11	11	22	46	6	723

Note: base sizes for business size in WEZ show sample size **before** weighting down. After weighting down so they represent overall London proportion they are: 43 for 1-10 employees, 13 for 11-49 employees and 2 for 50+ employees

The 18% (178 respondents) who were opposed or strongly opposed to Option 3C were asked why. The open-ended responses were assigned to one of the following codes:

- Would make congestion / traffic worse
- Existing Residents' discount is sufficient
- Not fair to have different charges.

The interviewer did not offer this list of possible reasons to the respondent. Any responses which could not be assigned to a code were typed in full. These 'other' responses were then 'hand analysed' and assigned codes if they represented more than 1% of responses. More than one response could be given and all responses were coded.

⁵ Note: this is based on businesses who pay the Congestion Charge and travel in the WEZ

The main reasons were that it was not fair to have different charges (mentioned by 29% of those who opposed Option 3C, representing 5% of all London businesses) and that the existing resident discount was sufficient (26%, 5% of all London businesses). Over a fifth (23%, 4% all London businesses) said it would make congestion/traffic worse.

Table 13: Reasons for opposing Option 3C (increase the Residents' discount from 90% to 100%) by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
Not fair to have different charges	29	28	25	31
Existing resident discount is sufficient	26	29	29	25
Would make congestion / traffic worse	23	16	16	27
Remove the WEZ - no one should have to pay	9	7	11	8
Residents should pay full charge	9	9	7	10
Residents' discount defeats the object of Congestion Charging	5	11	9	2
Extend buffer	4	2	0	5
It doesn't affect/interest me	2	2	2	1
There should be a reduced rate for everyone	2	0	2	1
Business should be exempt from Congestion Charge	1	5	0	1
Different rate for residents	1	0	2	0
Other	3	7	5	1
Weighted base	178	50	51	84

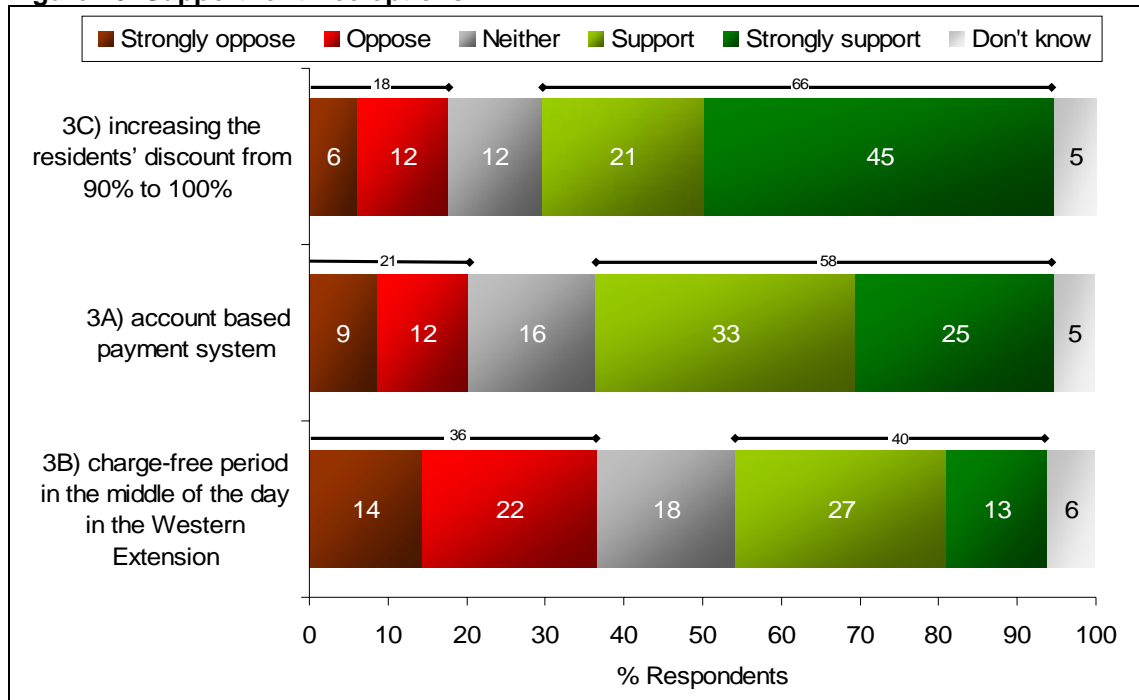
Note: More than one response could be given so figures add to more than 100%

Base: those who oppose Option 3C

Summary of Support for Three Options

Figure 16 shows support for the three options for all London businesses, ranked to show the option with the highest level of support first. Increasing the Residents' discount is the most supported of the three options and the charge free period the least supported.

Figure 16: Support for three options

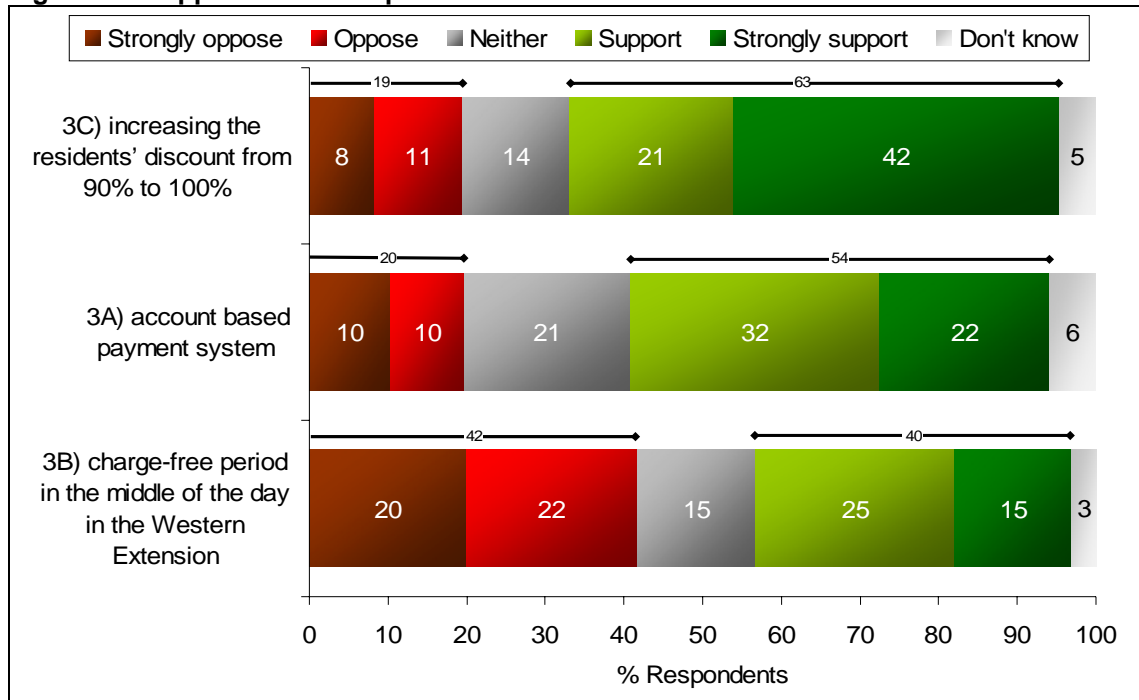


Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Businesses in the survey based in the WEZ have the same order of preferences as all London businesses: increasing the Residents' discount is the most supported of the three options and the charge free period the least supported.

Figure 17: Support for three options – businesses based in WEZ



Weighted base: 251 businesses in WEZ

Note: figures may not add to 100% because of rounding

Summary of other changes respondents would like to see made to the Western Extension

Respondents were also asked whether there were any other changes they would like to see made to the scheme.

Responses given were coded to the code frame, which is given at Appendix B. The main responses (representing 1% or more of all respondents) are shown below.

Overall 54% said there were no other changes they would like to see made to the Western Extension, although this proportion drops to 37% for WEZ based businesses.

Just over a third (36%) said they wanted the Western Extension removed, with WEZ based businesses most likely to say this (45%) and OCZ based businesses least likely to do so (26%).

Table 14: Whether any other changes they would like to see made to the Western Extension by area

	All London businesses		WEZ		OCZ		Rest of London	
	n	%	n	%	n		n	%
No	541	54	92	37	137	55	277	55
Remove WEZ	365	36	113	45	66	26	199	39
Comments for changes/additions to Discount and Exemption classes	21	2	12	5	0	0	13	3
Boundary issues (not request for extended buffer)	18	2	14	6	2	1	9	2
Economic / business Impacts - positive comment	16	2	10	4	0	0	10	2
Need for complementary measures	9	1	1	1	5	2	3	1
Charge should be lower in WEZ	7	1	5	2	0	0	5	1
Overall scheme hours should be longer/shorter	6	1	2	1	1	1	3	1
Buffer zone should be extended	5	1	1	1	0	0	3	1
Other	45	4	22	9	6	3	25	5
Weighted base	1,005		251		250		504	

Note: More than one response could be given so figures add to more than 100%

3.4 Business Characteristics

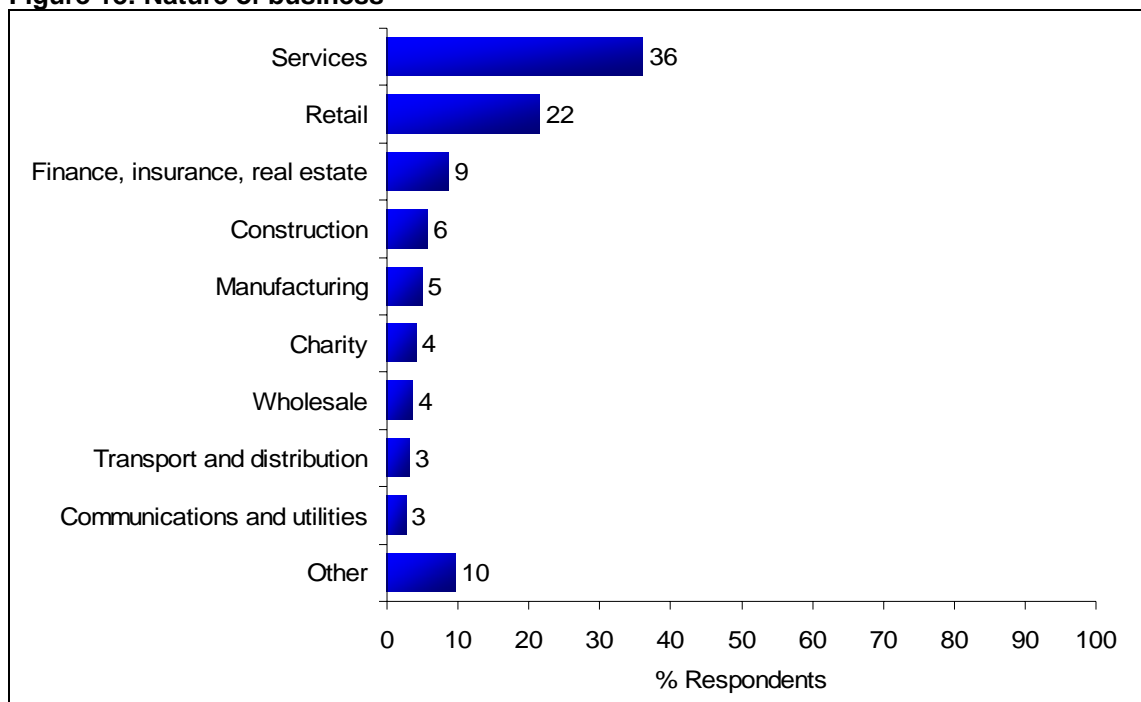
The tables in this section show the following names for the areas for businesses. The explanation for each of the areas is shown after the name:

- **WEZ** – businesses based within the Western Extension area
- **OCZ** – businesses based within the original charging zone
- **Rest of London** – businesses based outside both the original charging zone and the Western Extension.

Nature of business

Over a third (36%) of businesses were in the service sector with 22% in the retail sector.

Figure 18: Nature of business



Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Businesses based in the WEZ are much more likely to be in retail (30% compared to 17% for OCZ and 22% for the rest of London).

16% of businesses based in OCZ were in the finance, insurance, real estate compared to 12% for WEZ and 6% for the rest of London.

Table 15: Nature of business by area

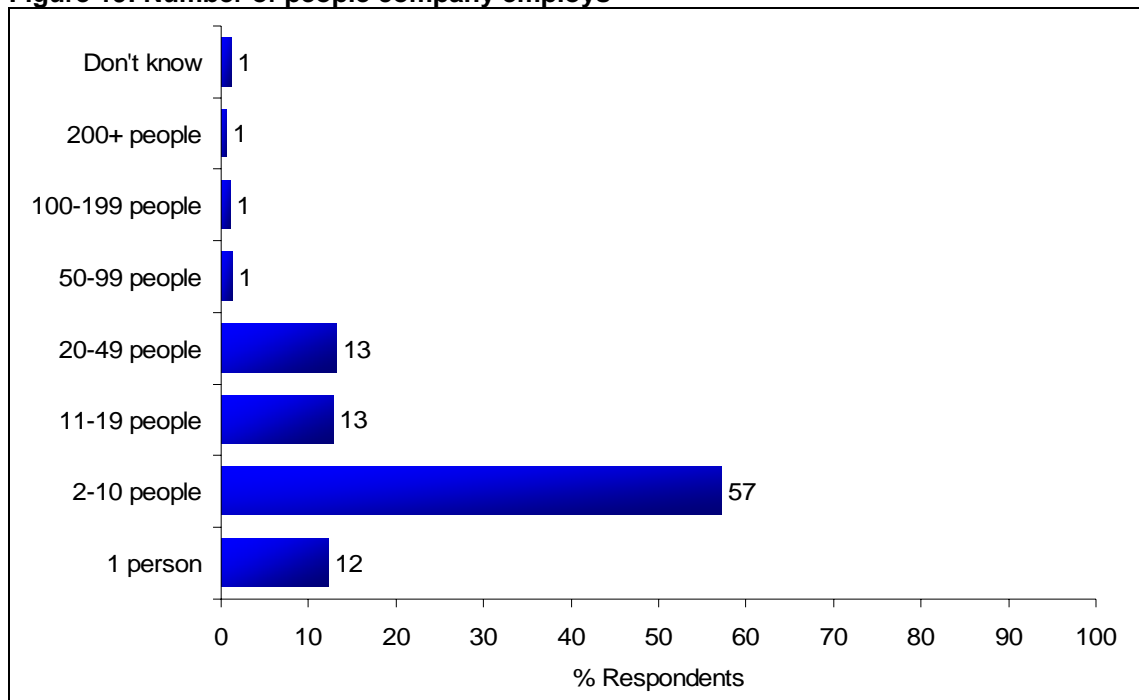
	All London businesses	WEZ	OCZ	Rest of London
	%	%	%	%
Services	36	30	40	36
Retail	22	30	17	22
Finance, insurance, real estate	9	12	16	6
Construction	6	2	5	7
Manufacturing	5	4	3	6
Charity	4	4	4	4
Wholesale	4	1	3	4
Transport and distribution	3	2	2	4
Communications and utilities	3	4	4	2
Other	10	13	7	10
Weighted base	1,005	251	250	504

Note: figures may not add to 100% because of rounding

Business size

Twelve per cent of businesses were single person businesses. Over half (57%) employed 2 to 10 people. There were very few businesses employing more than 50.

Figure 19: Number of people company employs



Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

There were more sole traders or self-employed businesses operating outside the Congestion Charging zone than within it: 15% outside compared to 9% in WEZ and 6% in OCZ. Businesses in the OCZ tended to be larger than elsewhere, for example 25% employed 20-49 compared to 11% in WEZ and 10% in the rest of London.

Table 16: Number of people company employs at that address by area

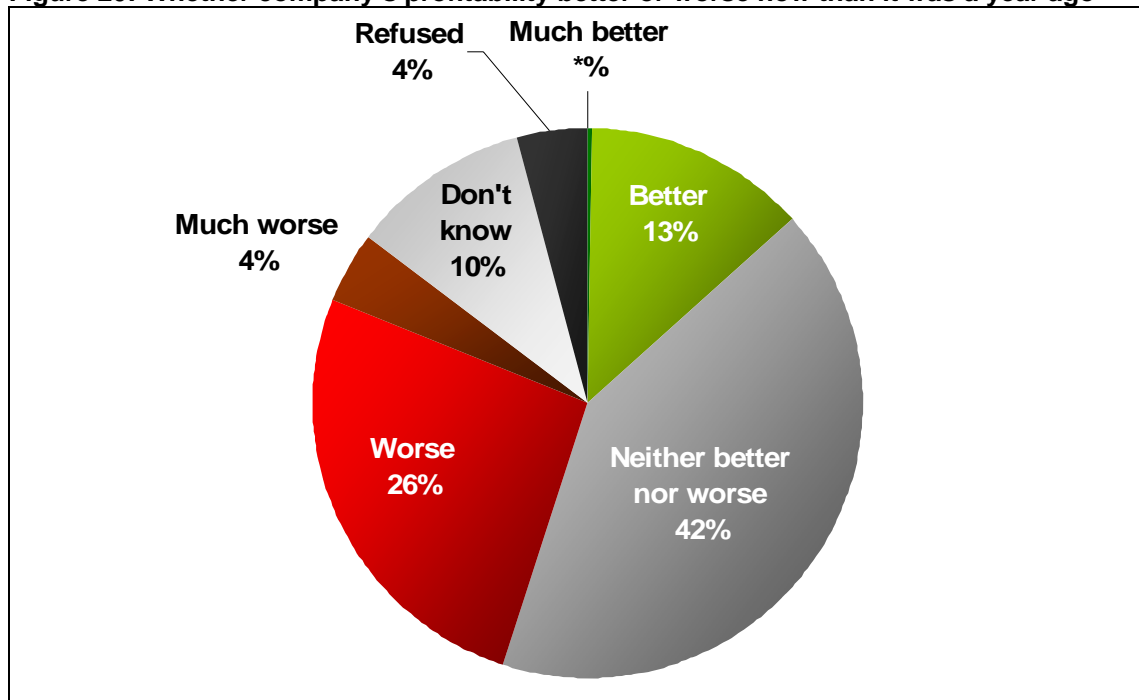
	All London businesses %	WEZ %	OCZ %	Rest of London %
1 person	12	9	6	15
2-10 people	57	66	47	60
11-19 people	13	11	14	13
20-49 people	13	11	25	10
50-99 people	1	1	3	1
100-199 people	1	1	2	1
200+ people	1	1	1	1
Don't know	1	*	1	1
Weighted base	1,005	251	250	504

Note: figures may not add to 100% because of rounding
 * = less than 0.5%

Company Profitability

Respondents were asked whether their company's profitability was better or worse now than it was a year ago. Almost a third (30%) said it was worse and 13% said it was better. Over four tenths (42%) said it was neither better nor worse and 10% did not know.

Figure 20: Whether company's profitability better or worse now than it was a year ago



Weighted base: 1,005 London businesses
 Note: figures may not add to 100% because of rounding
 * = less than 0.5%

Businesses based in the WEZ were much more likely to say their profitability was worse than businesses based elsewhere: 41% in the WEZ said their profitability was worse than a year ago compared to 27% in the OCZ and 31% in the rest of London.

Table 17: Whether company's profitability better or worse now than it was a year ago by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
Much better	*	0	0	*
Better	13	9	15	13
Neither better nor worse	42	35	41	42
Worse	26	36	23	27
Much worse	4	5	4	4
Don't know	10	10	14	9
Refused	4	5	4	4
Weighted base	1,005	251	250	504

Note: figures may not add to 100% because of rounding

* = less than 0.5%

Why company doing better/worse

Respondents who said their company's profitability was better than a year ago (13% of the overall sample) were asked what were the main reasons for that. All responses were typed in full. These responses were then 'hand analysed' and assigned codes if they represented more than 1% of responses. More than one response could be given and all responses were coded.

The main reasons given were increase in demand/growth (49%) and company improvements such as staffing and cost cutting (23%).

Table 18: Main causes of company doing better than a year ago by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
Increase in demand/growth	49	41	60	46
Company improvements (staffing, cost cutting, etc)	23	24	23	24
Marketing/advertising	8	5	7	9
Due to positive impact of Congestion Charging	5	6	0	7
Improvements are unconnected to Congestion Charging	4	10	4	3
General economy	4	5	4	3
Other	10	20	5	11
Weighted base	134	24	33	69

Note: figures may not add to 100% because of rounding

* = less than 0.5%

Respondents who said their company's profitability was worse than a year ago (30% of London businesses, 306 respondents) were asked what the main reasons were for that. Open-ended responses were assigned to one of the following codes:

- Credit crunch
- Increase in prices
- Congestion Charge in WEZ
- Congestion Charge in original zone
- Congestion Charge in general
- Decline in property market.

The interviewer did not offer this list of possible reasons to the respondent. Any responses which could not be assigned to a code were typed in full. These 'other' responses were then 'hand analysed' and assigned codes if they represented more than 1% of responses. More than one response could be given and all responses were coded.

Almost half (49%) cited the credit crunch. Also important were an increase in prices (23%) and the Congestion Charge: 21% in general and 10% in the WEZ.

Table 19: Main causes of company doing worse than a year ago by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
Credit crunch	49	46	44	51
Increase in prices	23	13	23	25
Congestion Charge in general	21	15	21	22
Congestion Charge in WEZ	10	50	6	6
Decline in property market	10	9	4	12
Economic downturn (reduced sales/fewer customers etc)	8	8	4	9
Congestion Charge in original zone	7	1	24	4
Other transport issues (parking/public transport etc)	5	2	0	6
The smoking ban	4	0	*	5
Increased costs	2	1	*	2
The bad weather	2	2	2	1
Other	7	4	6	8
Weighted base	306	106	58	163

Note: figures may not add to 100% because of rounding

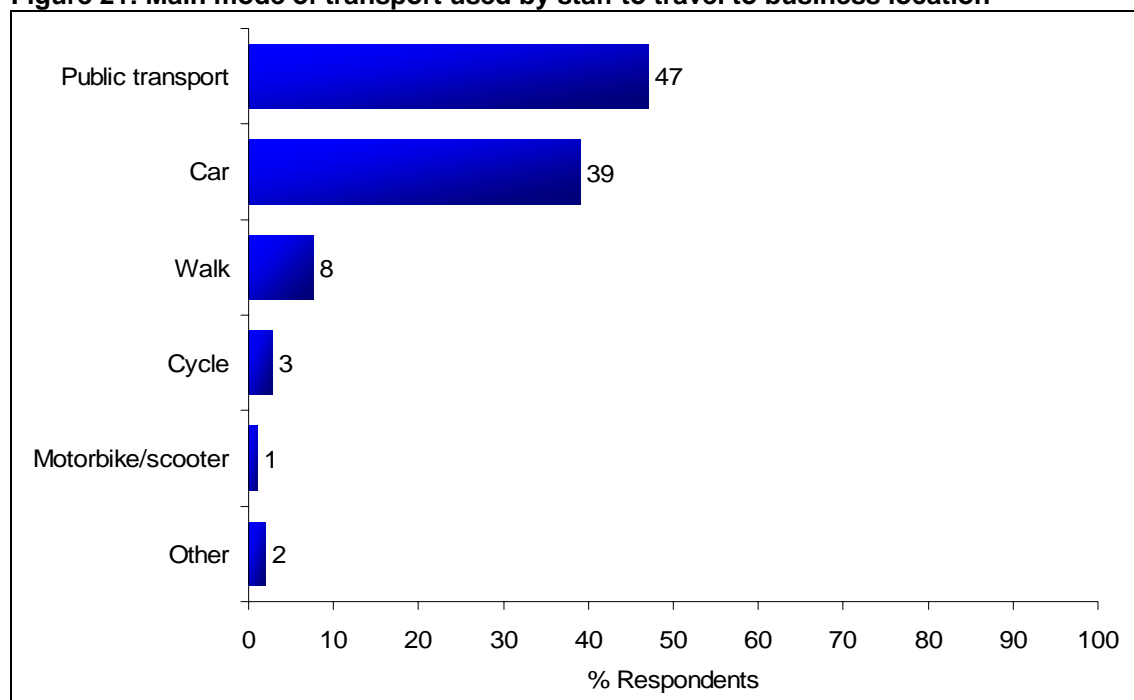
* = less than 0.5%

3.5 Travel Characteristics:

How staff travel to work

Respondents were asked what the main modes of travel to work were for them and their staff. Nearly half (47%) used public transport with 39% using a car.

Figure 21: Main mode of transport used by staff to travel to business location



Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Public transport use was much higher in the extended charging zone, particularly in the OCZ, than outside it.

Car use was lowest in the OCZ.

Table 20: Main mode of transport used by staff to travel to business location by area

	All London businesses	WEZ	OCZ	Rest of London
	%	%	%	%
Public transport	47	66	80	36
Car	39	21	14	48
Walk	8	7	1	10
Cycle	3	3	3	3
Motorbike/scooter	1	*	2	1
Other	2	3	1	3
Weighted base	1,005	251	250	504

Note: figures may not add to 100% because of rounding

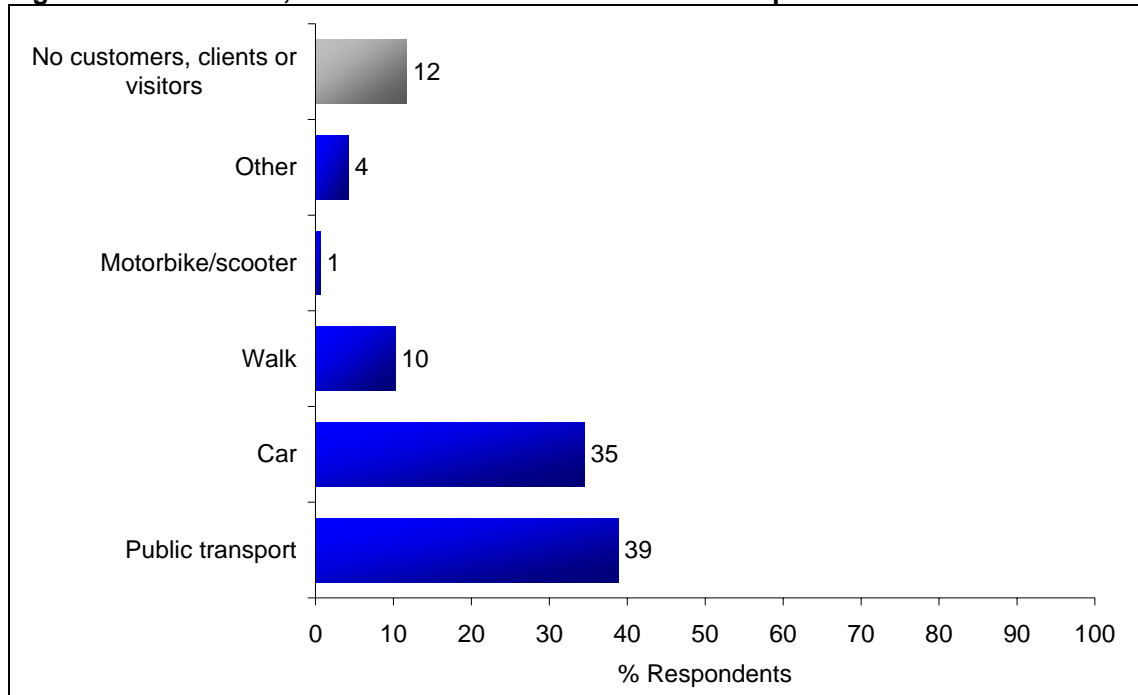
* = less than 0.5%

How customers, clients, visitors travel to business

Respondents were then asked how their customers, clients or visitors travel to their business.

Public transport was used by more than used the car: 39% compared to 35%.

Figure 22: Customers, clients or visitors main mode of transport to travel to business



Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Public transport was used by a much higher proportion of customers, clients or visitors in the extended charging zone, particularly in the OCZ, than outside it.

Businesses based in the WEZ said that 35% of customers, clients or visitors used a car to visit their business compared to 16% in the OCZ and 40% in the rest of London.

Table 21: Customers, clients or visitors main mode of transport to travel to business by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
Public transport	39	42	69	29
Car	35	35	16	40
Walk	10	11	5	12
Motorbike/scooter	1	0	0	1
Other	4	5	3	5
No customers, clients or visitors	12	7	7	14
Weighted base	1,005	251	250	504

Note: figures may not add to 100% because of rounding

3.6 Charging Zone

Whether company operates vehicles in OCZ and WEZ during charging hours

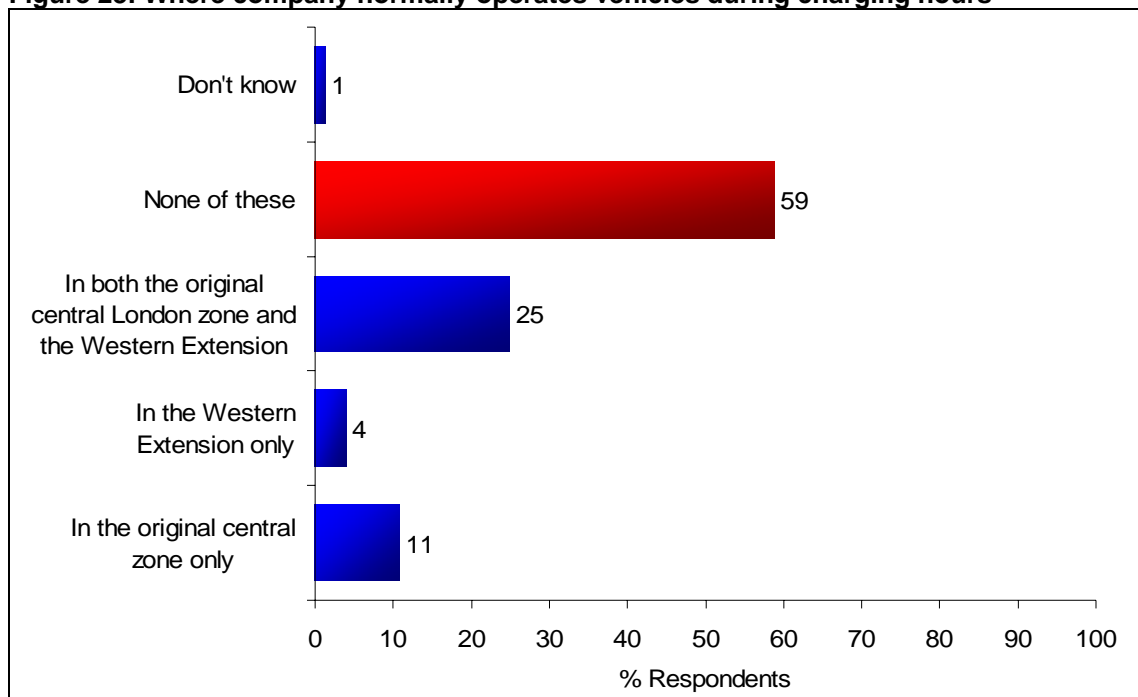
Respondents were reminded that the Congestion Charging zone operates from Monday to Friday 7am to 6pm and were asked which of the following parts of the zone their company usually operates vehicles in during those hours:

- In the original central zone only
- In the Western Extension only
- In both the original central London zone and the Western Extension
- None of these.

It should be noted that the scheme operates as one extended zone with a single daily charge of £8 for driving in or around the zone during charging hours. There is no separate charge for using a vehicle only with the Western Extension, or only within the original charging zone. The information in this section is based on respondents' answers about where they travel within the extended zone. Interviewers gave a brief description of the boundaries of the WEZ and OCZ if needed by the respondent.

Overall, four in ten companies in the survey operate vehicles during charging hours in either zone or both, 36% in the original charging zone and 29% in the Western Extension.

Figure 23: Where company normally operates vehicles during charging hours



Weighted base: 1,005 London businesses

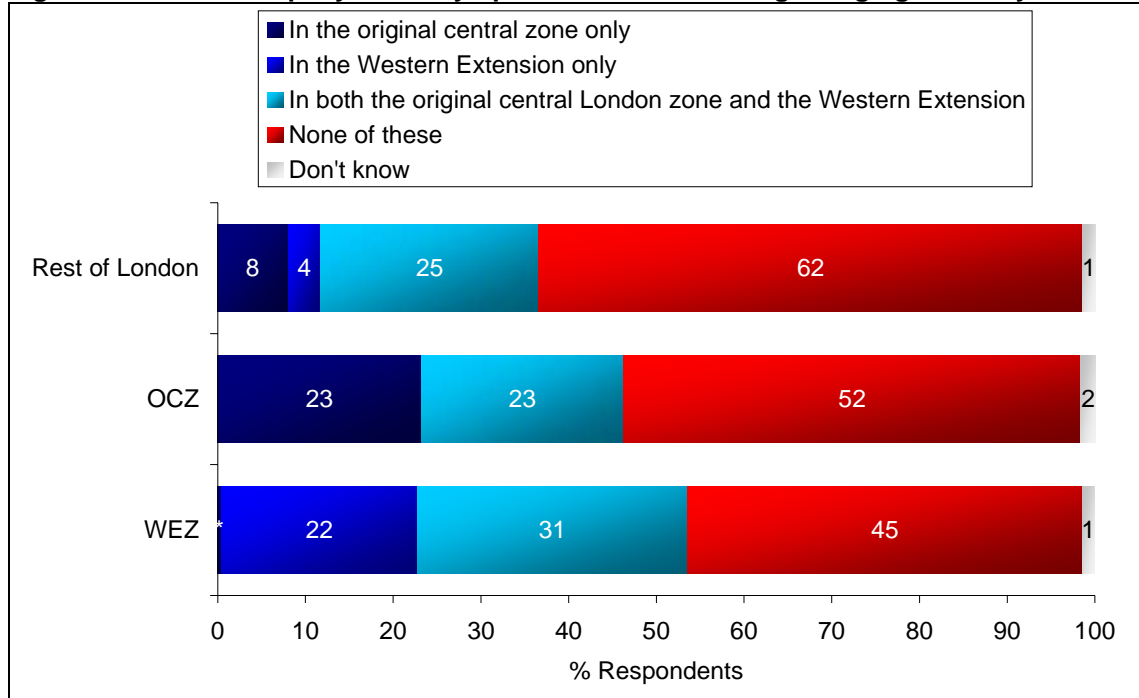
Note: figures may not add to 100% because of rounding

Over half (53%) of businesses located in the Western Extension zone operate vehicles during charging hours in either zone or both, 31% in the original charging zone and 53% in the Western Extension.

Nearly half (46%) of businesses located in the original charging zone operate vehicles during charging hours in either zone or both, 46% in the original charging zone and 23% in the Western Extension.

Over a third (37%) of businesses located in the rest of London operate vehicle during charging hours in either zone or both, 33% in the original charging zone and 29% in the Western Extension.

Figure 24: Where company normally operates vehicles during charging hours by area



Weighted base: 251 WEZ, 250 OCZ, 504 Rest of London

Note: figures may not add to 100% because of rounding

* = less than 0.5%

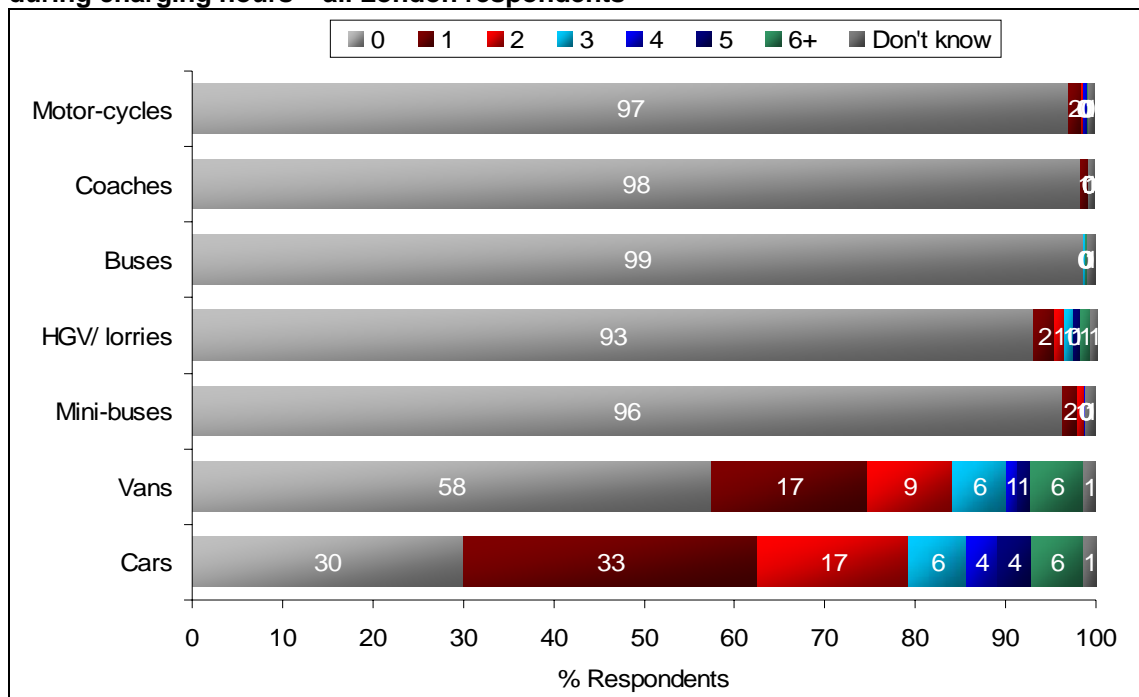
How many vehicles the company operates in OCZ and WEZ in charging hours

Businesses which did operate vehicles in either zone (40% of the sample) were asked approximately how many of the following vehicle types their company operate within both the original central London congestion charging zone and the Western Extension Monday to Friday 7am and 6pm:

- Cars
- Vans
- Mini-buses
- HGV/ lorries
- Buses
- Coaches
- Motor-cycles.

Over two thirds (69%) operate cars and 41% operate vans with very low proportions operating any other vehicle types. Figure 25 shows all categories of vehicles with six or more vehicles grouped together. Table 22 shows the full range of vehicle numbers for the overall sample and Table 23 shows the data for businesses based in the WEZ (54% of the WEZ sample).

Figure 25: How many of following vehicle types company operates within extended zone during charging hours – all London respondents



Weighted base: 1,005 London businesses

Note: figures may not add to 100% because of rounding

Table 22: How many of following vehicle types company operates within Congestion Charging zone during charging hours – all London respondents

	Cars %	Vans %	Mini- buses %	HGV/ lorries %	Buses %	Coaches %	Motor- cycles %
0	30	58	96	93	99	98	97
1	33	17	2	2	0	1	2
2	17	9	1	1	0	0	*
3	6	6	0	1	*	0	*
4	4	1	*	0	0	0	*
5	4	1	0	1	0	0	0
6-10	4	5	0	1	0	0	*
11-20	*	*	0	*	0	0	0
21-50	1	0	0	*	*	0	0
51+	1	1	0	0	0	0	0
Don't know	1	1	1	1	1	1	1
Weighted base	399	399	399	399	399	399	399

* = less than 0.5%

For the 54% of the WEZ sample which did operate vehicles in either zone, almost three quarters (74%) operate cars and 33% vans with very low proportions of other vehicle types.

Table 23: How many of following vehicle types company operates within extended zone during charging hours – businesses located in Western Extension

	Cars %	Vans %	Mini- buses %	HGV/ lorries %	Buses %	Coaches %	Motor- cycles %
0	26	67	97	97	99	99	93
1	39	22	1	3	0	*	2
2	17	7	*	0	0	0	3
3	8	1	0	0	0	0	0
4	3	2	1	0	0	0	0
5	2	1	0	0	0	0	0
6-10	2	2	0	0	0	0	2
11-20	1	0	0	0	0	0	0
21-50	1	0	0	0	0	0	0
51+	2	0	0	0	0	0	0
Don't know	*	0	1	1	1	0	1
Weighted base	138	138	138	138	138	138	138

* = less than 0.5%

How often company pays the Congestion Charge for vehicles

Original Charging Zone (OCZ)

Respondents who said they usually operate vehicles in the original charging zone during charging hours (36% of the sample) were asked how often on average they paid the Congestion Charge for vehicles driving in the zone.

Nearly two thirds (63%) of respondents who operate vehicles in the original charging zone during charging hours said they did so once a week or more, with 30% saying 5 days a week.

Table 24: Frequency company pays the Congestion Charge for vehicles driving in the original charging zone (companies which operate in original charging zone) by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
5 days a week	30	48	36	27
3-4 days a week	15	7	16	15
1-2 days a week	18	12	13	20
A few days a month	12	7	13	11
Every month or so	6	7	3	7
Every few months	3	1	0	4
Once or twice a year	3	6	2	3
Less often	2	1	5	1
Never	9	9	8	9
Don't know	3	1	3	3
Weighted base	359	81	101	174

Note: figures may not add to 100% because of rounding

Western Extension Zone (WEZ)

Respondents who said they usually operate vehicles in the Western Extension zone during charging hours (29% of the sample) were asked how often on average they paid the Congestion Charge for vehicles driving in the zone.

Over six tenths (61%) of respondents who operate vehicles in the Western Extension zone during charging hours do so once a week or more, with 32% saying 5 days a week.

Table 25: Frequency company pays the Congestion Charge for vehicles driving in the Western Extension zone (companies which operate in Western Extension zone) by area

	All London businesses %	WEZ %	OCZ %	Rest of London %
5 days a week	32	52	32	30
3-4 days a week	11	6	7	13
1-2 days a week	18	13	21	18
A few days a month	9	8	12	9
Every month or so	6	6	5	6
Every few months	2	2	2	2
Once or twice a year	6	6	5	6
Less often	1	0	0	2
Never	8	7	5	8
Don't know	7	2	11	7
Weighted base	290	137	50	151

Note: figures may not add to 100% because of rounding

Whether company registered with the Congestion Charging Fleet Scheme

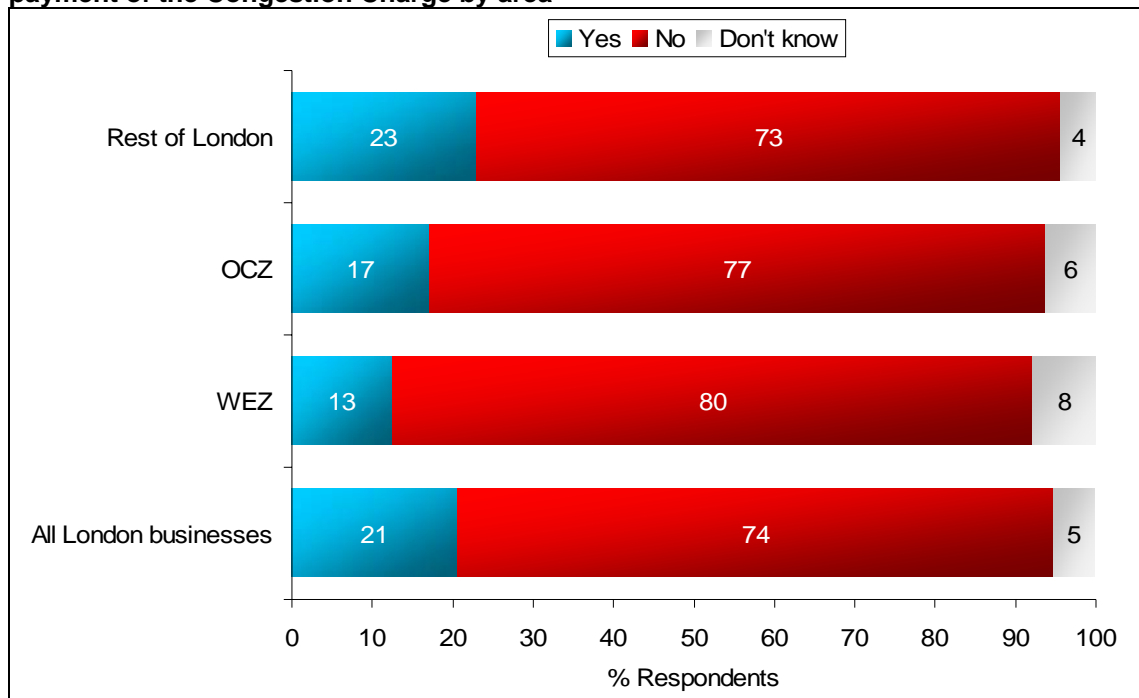
Those who did operate vehicles in either zone (40% of the sample) were asked if they were registered with the Congestion Charging Fleet Scheme for payment of the Congestion Charge. Businesses with ten or more vehicles registered with the Congestion Charging Fleet Scheme pay £7 per vehicle per day.

Just over a fifth (21%) were registered with the Congestion Charging Fleet Scheme for payment of the Congestion Charge.

The proportion of businesses which are registered with the Congestion Charging Fleet Scheme is lower in the congestion charging zone than outside:

- 13% of the 54% of businesses located in the Western Extension zone who operate vehicles in either zone or both
- 17% of the 46% of businesses located in the original charging zone who operate vehicles in either zone or both
- 23% of the 37% of businesses located in the rest of London who operate vehicles in either zone or both.

Figure 26: Whether company registered with the Congestion Charging Fleet Scheme for payment of the Congestion Charge by area



Weighted base: companies which operate vehicles in either zone: 399 all London businesses, 138 WEZ, 101 OCZ, 193 rest of London

Note: figures may not add to 100% because of rounding

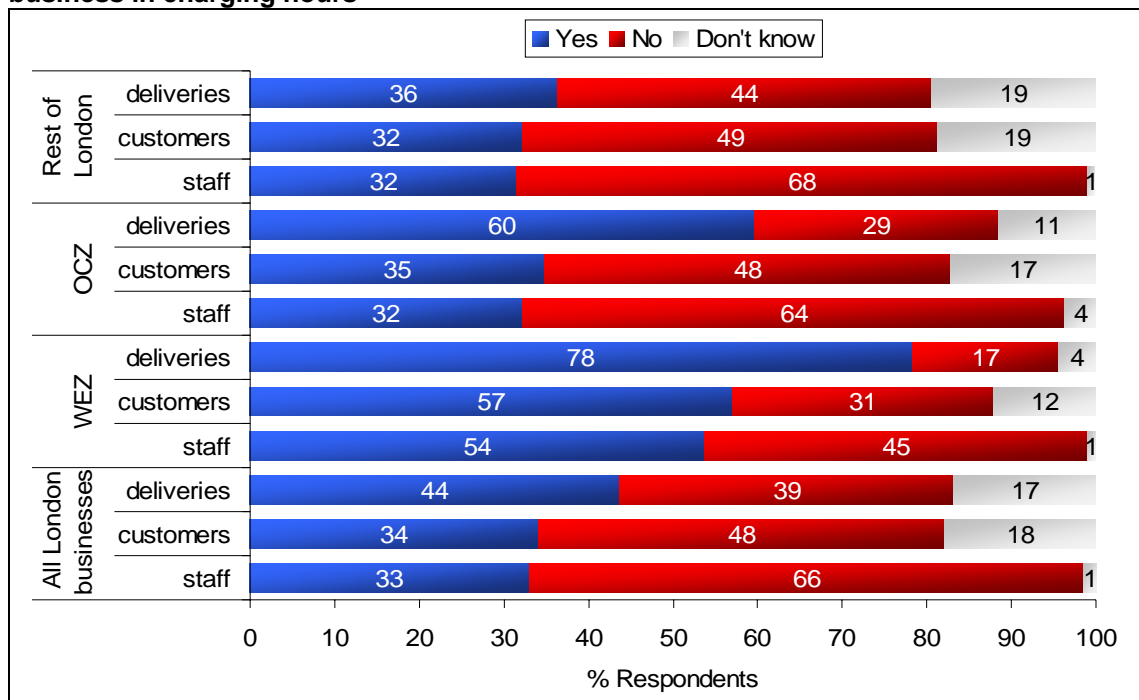
Whether staff, customers, clients or visitors or deliveries in Western Extension zone in charging hours

Businesses were asked whether they or their staff drove into or within the Western Extension zone to do business in charging hours. Overall a third did, 54% in the WEZ and 32% elsewhere in London.

Just over a third said customers, clients or visitors drove into or within the Western Extension zone to do business in charging hours: 57% in the WEZ, 35% in the OCZ and 32% in the rest of London. A large proportion (18%) said they didn't know.

Over four tenths (44%) had deliveries to their businesses by car, lorry or van that drove into or within the Western Extension zone in charging hours: 78% in the WEZ, 60% in the OCZ and 36% elsewhere. A large proportion (17%) said they didn't know.

Figure 27: Whether staff, customers, clients or visitors drove or deliveries made to business by car, lorry or van that drove into or within the Western Extension zone to do business in charging hours



Weighted base: 1,005 London businesses, 251 WEZ, 250 OCZ, 504 Rest of London

Note: figures may not add to 100% because of rounding

APPENDIX A

Paper Version of Questionnaire

WEZ Business Attitudinal Survey

Good morning/afternoon/evening. I'm from Accent, an independent market research agency. We are conducting a survey for Transport for London and we would like to ask you some questions about the central London Congestion Charging scheme.

May I ask you some questions?

The interview should last about 10 minutes. You do not have to answer questions you do not wish to and you can terminate the interview at any point.

All your answers will be treated with the strictest confidence under the rules of the Market Research Society Code of Conduct. It will not be possible to identify any particular business in the results.

1. Within (INSERT NAME OF COMPANY FROM SAMPLE), are you involved in making decisions about transport or finances that could affect your company or the services that you offer? SINGLE CODE ONLY

If yes, go to Q2. If no, make an appointment to speak to the transport or financial decision-maker.

2. Firstly, could I please ask some questions about your business. These are purely for classification purposes and we will not pass this information on to anyone else.

Can I check the postcode of the business location you work from?

3. And does your business operate from within the original Congestion Charging zone or from within the Western Extension to the Congestion Charging zone?

[Prompt with geographical descriptors if necessary – see Q11]

Original zone

Western Extension

Outside Congestion Charging zone

Don't know

CHECK QUOTAS

4. What is the nature of your business? (READ OUT – SINGLE CODE)

Retail

Finance, insurance, real estate

Services

Manufacturing

Wholesale

Transport and distribution

Communications and utilities

Construction

Charity

Other (**specify**)

5. How many people does your company employ at this address? (SINGLE CODE)

- sole trader
- 2-10
- 11 – 19
- 20 – 49
- 50 – 99
- 100 – 199
- 200+
- Don't know

CHECK QUOTAS based on Small = 1-49 employees, Medium = 50-199 employees, Large = 200+ employees.

6. Is your company's profitability better or worse now than it was a year ago? (READ OUT – SINGLE CODE)

- Much better
- Better
- Neither better nor worse
- Worse
- Much worse
- Don't know
- Refused

IF BETTER, GO TO QUESTION 7

IF WORSE, GO TO QUESTION 8

IF NEITHER, DON'T KNOW OR REFUSED GO TO QUESTION 9

7. What have been the main causes of your company doing better now than a year ago? (OPEN TEXT)

8. What have been the main causes of your company doing worse than a year ago? (OPEN TEXT)

- Credit crunch
- Increase in prices
- Congestion Charge in WEZ
- Congestion Charge in original zone
- Congestion Charge in general
- Decline in property market
- Other **(OPEN ENDED)**

9. Thinking about how you/you and your staff⁶ travel to work at this location, what would you say is the main mode of transport?

- Public transport

⁶ You if Q4 = 1, you and your staff if Q4 = 2+

Car
Walk
Cycle
Motorbike/scooter
Other

10. Thinking about how your customers, clients or visitors travel to your business, what would you say is the main mode of transport?

Public transport

Car

Walk

Cycle

Motorbike/scooter

Other

NO customers, clients or visitors

11. The Congestion Charging zone operates from Monday to Friday 7am to 6pm. Can you tell me in which of the following parts of the zone your company usually operates vehicles during these hours? (READ OUT - SINGLE CODE)

In the original central zone only

In the Western Extension only

In both the original central London zone and the Western Extension

None of these

Don't know

[Prompt if necessary with: By the original zone, I mean south of the Euston and City roads, east of Hyde Park and Victoria, north of Vauxhall and Elephant and Castle and west of Tower Bridge and Whitechapel.

The Western Extension area covers most of Kensington & Chelsea and Westminster, broadly bounded by Harrow Road, Scrubs Lane, West Cross Route, the Earls Court one-way system and Chelsea Embankment.]

IF NONE OR DON'T KNOW, GO TO QUESTION 15

12. Approximately how many of the following vehicle types does your company operate within both the original Central London congestion charging zone and the Western Extension Monday to Friday between 7am and 6pm? (READ OUT – MULTICODE)

Cars	Vans	Mini-buses	HGV/lorries	Buses	Coaches	Motor-cycles
0	0	0	0	0	0	0
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
6-10	6-10	6-10	6-10	6-10	6-10	6-10
11-20	11-20	11-20	11-20	11-20	11-20	11-20
21-50	21-50	21-50	21-50	21-50	21-50	21-50
51+	51+	51+	51+	51+	51+	51+
Don't	Don't	Don't	Don't	Don't	Don't	Don't

know	know	know	know	know	know	know
------	------	------	------	------	------	------

Ask If Q11 = 1 OR 3: 13A. How often, on average, does your company pay the Congestion Charge for vehicles driving in the original charging zone? (READ OUT –SINGLE CODE)

- 5 days a week
- 3 – 4 days a week
- 1 – 2 days a week
- A few days a month
- Every month or so
- Every few months
- Once or twice a year
- Less often
- Never
- Don't know

Ask If Q11 = 2 OR 3: 13B. How often, on average, does your company pay the Congestion Charge for vehicles driving in the Western Extension? (READ OUT –SINGLE CODE)

- 5 days a week
- 3 – 4 days a week
- 1 – 2 days a week
- A few days a month
- Every month or so
- Every few months
- Once or twice a year
- Less often
- Never
- Don't know

14. Is your company registered with the Congestion Charging Fleet Scheme for payment of the Congestion Charge?

- Yes
- No
- Don't know

15. Do you or any of your staff drive into or within the Western Extension to the Congestion Charging zone to do business between 7am and 6pm on Monday to Friday? (SINGLE CODE)

IF SOLE TRADER: Do you drive into or within the Western Extension to the Congestion Charging zone to do business between 7am and 6pm on Monday to Friday? (SINGLE CODE)

- Yes
- No
- Don't know

16. Do any of your customers, clients or visitors drive into or within the Western Extension zone to do business between 7am and 6pm on Monday to Friday? (SINGLE CODE)

- Yes
- No
- Don't know

17. Do you have any deliveries made to your business by car, lorry or van that drive in or through the Western Extension zone between 7am and 6pm on Monday to Friday? (SINGLE CODE)

Yes

No

Don't know

18. The Mayor of London has asked Transport for London to carry out a public consultation on the future of the Western Extension zone. Before this phone call, were you aware or not of this public consultation? SINGLE CODE ONLY

Aware

Vaguely

Not aware

Don't know

(IF AWARE SAY :As you are aware....) The consultation is about what should happen with the Western Extension: whether it should be retained in its present form, removed, or changed. The options for change are: introducing payment accounts to make it easier to pay the charge; a charge-free period in the middle of the day and an increase to the residents' discount.

19. What do you think should happen to the Western Extension of the Congestion Charging zone. (READ OUT – SINGLE CODE ONLY)

a) Keep the Western Extension as it is

b) Remove the Western Extension so that there would no longer be any charge to drive in this area and residents of the Western Extension would no longer receive a discount on travel in the original charging zone

c) Change the way that the scheme operates

Don't know **(DON'T READ OUT)**

20. With regard to changing the way that the scheme operates, I would like you to say how much you support or oppose each of the following three options on a scale of 1 to 5, where 1 = 'strongly support' and 5 = 'strongly oppose'. (READ OUT – SINGLE CODE ONLY FOR EACH question)

Option A) Introduce an account based payment system across the both the original charging zone and the Western Extension so that drivers can have the charge debited from an account automatically and would not have to worry about forgetting to pay the charge and getting a penalty charge. It would also allow residents to pay for a single charging day's travel in the zone. Non account-holders would still be able to pay the charge via the existing payment channels.

Strongly support

Support

Neither

Oppose

Strongly oppose

Don't know

IF OPPOSE/STRONGLY OPPOSE ASK: Why do you say that?

Don't trust Transport for London (TfL) with account details/money

Like existing payment channels

Should not be compulsory
Privacy concerns / 'Big brother'
Might cost more/ need for minimum balance
Other **PROBE, TYPE IN (OPEN ENDED)**

Option B) Introduce a charge-free period in the middle of the day in the Western Extension. However, driving in the original zone, or during charged hours in the Western Extension, would still cost £8

Strongly support
Support
Neither
Oppose
Strongly oppose
Don't know

IF OPPOSE/STRONGLY OPPOSE ASK: Why do you say that?

Would make congestion / traffic worse
Not middle of day
Too confusing for drivers
Not just Western Extension – should be whole zone
Other **PROBE, TYPE IN (OPEN ENDED)**

Option C) Increase the residents' discount from 90% to 100% across both the original charging zone and the Western Extension so that residents would not be liable to pay the charge

Strongly support
Support
Neither
Oppose
Strongly oppose
Don't know

IF OPPOSE/STRONGLY OPPOSE ASK: Why do you say that?

Would make congestion / traffic worse
Existing resident discount is sufficient
Not fair to have different charges
Other **PROBE, TYPE IN (OPEN ENDED)**

[READ OUT FURTHER DESCRIPTION OF OPTIONS FROM LEAFLET ONLY IF NEEDED]

21. Are there any other changes you would like to see made to the Western Extension?

No

Remove it

Other (**OPEN ENDED**)

--

22 On behalf of Transport for London, we may wish to contact you again to conduct some follow-on research? Would you be willing to participate in further research?

Yes

No

Thanks and close.

APPENDIX B

Code Frame

Code Frame

Supporting the Options as presented	
01	Keep WEZ
02	Remove WEZ
03	Change WEZ
Support/opposition of the Concepts that were presented	
10	for Accounts
11	against Accounts
12	for Free middle of day
13	against Free period in the middle of the day
14	for Res Disc to 100%
15	against Res Disc to 100%
Variations on the Options and Concepts	
20	Other payment options should be introduced (other than accounts)
21	Concepts should be available to those without accounts
22	Concern about accounts (eg privacy)
23	Free period in middle of day should apply to the whole zone
24	Charging should apply in the morning peak only
25	Charging should apply in the evening peak only
26	Should be time banding throughout day
27	Should be Reduction in Residents' Discount (or no residents' discount)
28	Charge should be lower in WEZ
29	Charge should be lower in CLoCCS / extended zone
30	Other comments on the suggested options, concepts and changes
Other suggestions for changes to the scheme	
40	Boundary issues (not request for extended buffer)
41	Buffer zone should be extended
42	Scheme should operate as two zones
43	Withdraw whole scheme
44	Comments for changes/additions to Discount and Exemption classes
45	Overall scheme hours should be longer/shorter
46	Changes to CLoCCS
47	Should be an increase to the Congestion Charge
Comments we might be interested in	
60	CC Is beneficial to AQ/CO2
61	CC Is not beneficial to AQ/CO2
62	Concerns about knock on effects of removal/change on provision of PT
63	Concern about PT journey times
64	Changes should be introduced sooner
65	On the nature of the consultation
66	Need for complementary measures
67	Cost of motoring issues
68	Is only to raise revenue
69	Has made no difference to congestion/ congestion is worse
70	Congestion would be worse without CC/WEZ
71	Economic / business Impacts - positive comment
72	Economic / business Impacts - negative comment
73	Social Impacts of scheme - positive
74	Social Impacts of scheme - negative
75	Alternatives to CC
76	Should be greater parking provision without and outside the zone
77	Introduce clearer CC signage around the perimeter of the zone
78	Improve phasing of traffic lights to reduce congestion
79	Deter people registering domestic vehicles as PHVs to avoid charge
99 Comments about Extended Zone/ Cloccs and other irrelevant comments	

Appendix C

Report on Pilot

Report on Attitudinal Pilot

Introduction

This note sets out the findings from the pilot of the business attitudinal survey.

The target sample size was ten interviews.

The purpose of the pilot was to test:

- the recruitment process
- the clarity and flow of the questionnaire
- the appropriateness of the language used
- the accuracy of all routings
- the interview duration
- the survey hit rate.

Business Attitudinal Sample

For the business survey the employee size was changed to match the sample size definitions, as follows:

- Small 1-49 employees
- Medium 50-200 employees
- Large 200+ employees.

Overview of Pilots

The average length of the business interviews was ten minutes.

Business Survey Top Line Results

Q2. Can I check the postcode of the business location you work from?

Q3. And does your business operate in the original Congestion Charging zone or in the Western Extension to the Congestion Charging zone?

Original zone

Western Extension

Outside Congestion Charging zone

Don't know

Post-pilot recommendations: Accent recommend rephrasing the question to “And does your business operate **FROM WITHIN** the original Congestion Charging zone or **FROM WITHIN** the Western Extension to the Congestion Charging zone?” otherwise those who, for example, deliver to OCZ may answer code 1.

Q4. What is the nature of your business?

Post-pilot recommendations: Accent recommend changing the 'other' box so that the nature of the business can be recorded (so we can check whether it should be re-coded).

Q5. How many people does your company employ at this address?

Post-pilot recommendations: Please note that codes are slightly changed to match sample source; 2-9 now 2-10; 10-29 and 30-49 now 11-19 and 20-49, 100-249 now 100-199, 250+ now 200+

Q6. Is your company's profitability better or worse now than it was a year ago?

Much better

Better

Neither better nor worse

Worse

Much worse

Don't know

Refused

Q7. What have been the main causes of your company doing better now than a year ago?

Q8. What have been the main causes of your company doing worse than a year ago?

Post-pilot recommendations: Accent recommends following codes are added

Credit crunch

Increase in prices

Congestion charge

Decline in property market

Other

Q9. Thinking about how you/you and your staff travel to work at this location, what would you say is the main mode of transport?

Public transport

Car

Walk

Cycle

Motorbike/scooter

Other

Q10. Thinking about how your customers, clients or visitors travel to your business, what would you say is the main mode of transport?

Public transport

Car

Walk

Cycle

Motorbike/scooter

Other

Post-pilot recommendations: Accent recommends adding a code 'no customers, clients or visitors' for those companies that don't have any.

Q11. The Congestion Charging zone operates from Monday to Friday 7am to 6pm. Can you tell me in which of the following parts of the zone your company usually operates vehicles during these hours?

In the original central zone only

In the Western Extension only

In both the original central London zone and the Western Extension

None of these

Don't know

Q12. Approximately how many of the following vehicle types does your company operate within both the original Central London congestion charging zone and the Western Extension Monday to Friday between 7am and 6pm?

Cars

Vans

Minibuses

HGV/lorries

Buses

Coaches

Motorcycles

This may exclude those who only operate in one or other.

Post-pilot recommendations: Accent suggests rephrase to: “Approximately how many of the following vehicle types does your company operate within ~~both~~ the original Central London congestion charging zone and/OR the Western Extension Monday to Friday between 7am and 6pm?”

Q13. How often, on average, does your company pay the Congestion Charge for vehicles driving in the extended Congestion Charging zone, consisting of both the original zone and the Western Extension?

5 days a week

3-4 days a week

1-2 days a week

A few days a month

Every month or so

Every few months

Once or twice a year

Less often

Never

Don't know

Q14. Is your company registered with the Congestion Charging Fleet Scheme for payment of the Congestion Charge?

Yes

No

Don't know

Q15. Do any of your staff drive into or within the Western Extension to the Congestion Charging zone to do business between 7am and 6pm on Monday to Friday?

Yes

No

Don't know

Post-pilot recommendations: Accent recommends that, if sole trader this question should read “Do you drive into or within the Western Extension to the Congestion Charging zone to do business between 7am and 6pm on Monday to Friday?”

Accent recommends removing “to the Congestion Charging zone” from the question as some seemed confused and thought we were asking “... Western Extension **and into** the Congestion Charging zone.”

Q16. Do any of your customers, clients or visitors drive into or within the Western Extension to the Congestion Charging zone to do business between 7am and 6pm on Monday to Friday?

Yes

No

Don't know

Post-pilot recommendations: Accent recommends removing “to the Congestion Charging zone” from the question as some seemed confused and thought we were asking “... Western Extension **and into** the Congestion Charging zone.”

Q17. Do you have any deliveries made to your business by car, lorry or van that drive in or through the Western Extension to the Congestion Charging zone between 7am and 6pm on Monday to Friday?

Yes

No

Don't know

Post-pilot recommendations: Accent recommends removing "to the Congestion Charging zone" from the question as some seemed confused and thought we were asking "... Western Extension **and into** the Congestion Charging zone."

Q18. The Mayor of London has asked Transport for London to carry out a public consultation on the future of the Western Extension of the Congestion Charging zone. Before this phone call, were you aware or not of this public consultation?

Aware

Vaguely

Not aware

Don't know

Q19. I would now like to ask you some questions about what you think should happen to the Western Extension of the Congestion Charging zone.

The introductory question text (ie the part which says "Later in the questionnaire I will ask you about three different changes to the Western Extension that could be made, these are: introducing payment accounts to make it easier to pay the charge; a charge-free period in the middle of the day and an increase to the residents' discount") was too long and some respondents interrupted the interviewer.

Post-pilot recommendations: Accent recommends slightly changing the order of the question so it reads:

"Later in the questionnaire I will ask you about three different changes to the Western Extension that could be made, these are: introducing payment accounts to make it easier to pay the charge; a charge-free period in the middle of the day and an increase to the residents' discount.

But first, can you please tell me which of the following you think should happen to the Western Extension?" READ OUT

Q20. With regard to changing the way that the scheme operates, I would like you to say how much you support or oppose each of the following three options:

Introduce an account based payment system across the both the original charging zone and the western extension so that drivers can have the charge debited from the account automatically and would not have to worry about forgetting to pay the charge and getting a penalty charge. It would also allow residents to pay for a single charging day's travel in the zone.

Strongly support

Support

Neither

Oppose

Strongly oppose
Don't know

Introduce a charge-free period in the middle of the day in the Western Extension.
Driving in the original zone, or during charged hours in the Western Extension, would still cost £8

Strongly support
Support
Neither
Oppose
Strongly oppose
Don't know

Post-pilot recommendations: Accent recommends that the question is rephrased as:
“Introduce a charge-free period in the middle of the day in the Western Extension.
HOWEVER Driving in the original zone...”

Increase the residents' discount from 90% to 100% across both the original charging zone and the western extension so that residents would not be liable to pay the charge

Strongly support
Support
Neither
Oppose
Strongly oppose
Don't know

Q21. Are there any other changes you would like to see made to the Western Extension?

Post-pilot recommendations: Accent recommends adding codes for 'no' and 'remove it'

Pilot Questionnaire

Good morning/afternoon/evening. I'm from Accent, an independent market research agency. We are conducting a survey for Transport for London and we would like to ask you some questions about the central London Congestion Charging scheme.

May I ask you some questions?

The interview should last about 10 minutes. You do not have to answer questions you do not wish to and you can terminate the interview at any point.

All your answers will be treated with the strictest confidence under the rules of the Market Research Society Code of Conduct. It will not be possible to identify any particular business in the results.

1. Within (INSERT NAME OF COMPANY FROM SAMPLE), are you involved in making decisions about transport or finances that could affect your company or the services that you offer? SINGLE CODE ONLY

If yes, go to Q2. If no, make an appointment to speak to the transport or financial decision-maker.

2. Firstly, could I please ask some questions about your business. These are purely for classification purposes and we will not pass this information on to anyone else.

Can I check the postcode of the business location you work from?

3. And does your business operate in the original Congestion Charging zone or in the Western Extension to the Congestion Charging zone?

[Prompt with geographical descriptors if necessary – see Q11]

Original zone

Western Extension

Outside Congestion Charging zone

Don't know

CHECK QUOTAS

4. What is the nature of your business? (READ OUT – SINGLE CODE)

Retail

Finance, insurance, real estate

Services

Manufacturing

Wholesale

Transport and distribution

Communications and utilities

Construction

Charity

Other

5. How many people does your company employ at this address? (SINGLE CODE)

sole trader

2-10

11-19

20-49

50-99

100-199

200+

Don't know

CHECK QUOTAS based on Small = 1-49 employees, Medium = 50-199 employees, Large = 200+ employees.

6. Is your company's profitability better or worse now than it was a year ago? (READ OUT – SINGLE CODE)

Much better

Better

Neither better nor worse

Worse

Much worse

Don't know

Refused

IF BETTER, GO TO QUESTION 7

IF WORSE, GO TO QUESTION 8

IF NEITHER, DON'T KNOW OR REFUSED GO TO QUESTION 9

7. What have been the main causes of your company doing better now than a year ago? (OPEN TEXT)

--

8. What have been the main causes of your company doing worse than a year ago? (OPEN TEXT)

--

9. Thinking about how you/you and your staff⁷ travel to work at this location, what would you say is the main mode of transport?

Public transport

Car

Walk

Cycle

Motorbike/scooter

Other

⁷ You if Q4 = 1, you and your staff if Q4 = 2+

10. Thinking about how your customers, clients or visitors travel to your business, what would you say is the main mode of transport?

- Public transport
- Car
- Walk
- Cycle
- Motorbike/scooter
- Other

11. The Congestion Charging zone operates from Monday to Friday 7am to 6pm. Can you tell me in which of the following parts of the zone your company usually operates vehicles during these hours? (READ OUT - SINGLE CODE)

INTERVIEWER: PROMPT IF NECESSARY WITH: By the original zone, I mean south of the Euston and City roads, east of Hyde Park and Victoria, north of Vauxhall and Elephant and Castle and west of Tower Bridge and Whitechapel.

The western extension area covers most of Kensington & Chelsea and Westminster, broadly bounded by Harrow Road, Scrubs Lane, West Cross Route, the Earls Court one-way system and Chelsea Embankment.

- In the original central zone only
- In the Western Extension only
- In both the original central London zone and the Western Extension
- None of these
- Don't know

IF NONE OR DON'T KNOW, GO TO QUESTION 15

12. Approximately how many of the following vehicle types does your company operate within both the original Central London congestion charging zone and the Western Extension Monday to Friday between 7am and 6pm? (READ OUT – MULTICODE)

Cars	Vans	Mini-buses	HGV/lorries	Buses	Coaches	Motor-cycles
0	0	0	0	0	0	0
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
6-10	6-10	6-10	6-10	6-10	6-10	6-10
11-20	11-20	11-20	11-20	11-20	11-20	11-20
21-50	21-50	21-50	21-50	21-50	21-50	21-50
51+	51+	51+	51+	51+	51+	51+
Don't know	Don't know	Don't know	Don't know	Don't know	Don't know	Don't know

13. How often, on average, does your company pay the Congestion Charge for vehicles driving in the extended Congestion Charging zone,

consisting of both the original zone and the Western Extension? (READ OUT –SINGLE CODE)

5 days a week
3 – 4 days a week
1 – 2 days a week
A few days a month
Every month or so
Every few months
Once or twice a year
Less often
Never
Don't know

14. Is your company registered with the Congestion Charging Fleet Scheme for payment of the Congestion Charge?

Yes
No
Don't know

15. Do any of your staff drive into or within the Western Extension to the Congestion Charging zone to do business between 7am and 6pm on Monday to Friday? (SINGLE CODE)

Yes
No
Don't know

16. Do any of your customers, clients or visitors drive into or within the Western Extension to the Congestion Charging zone to do business between 7am and 6pm on Monday to Friday? (SINGLE CODE)

Yes
No
Don't know

17. Do you have any deliveries made to your business by car, lorry or van that drive in or through the Western Extension to the Congestion Charging zone between 7am and 6pm on Monday to Friday? (SINGLE CODE)

Yes
No
Don't know

18. The Mayor of London has asked Transport for London to carry out a public consultation on the future of the Western Extension of the Congestion Charging zone. Before this phone call, were you aware or not of this public consultation? SINGLE CODE ONLY

Aware
Vaguely
Not aware
Don't know

19. I would now like to ask you some questions about what you think should happen to the Western Extension of the Congestion Charging zone.

The three options are a) to keep the Western Extension as it is, b) to remove the Western Extension and c) to change the Western Extension.

Later in the questionnaire I will ask you about three different changes to the Western Extension that could be made, these are: introducing payment accounts to make it easier to pay the charge; a charge-free period in the middle of the day and an increase to the residents' discount. But first, can you please tell me which of the following you think should happen to the Western Extension? (READ OUT – SINGLE CODE ONLY)

Keep the Western Extension as it is

Remove the Western Extension so that there would no longer be any charge to drive in this area and residents of the Western Extension would no longer receive a discount on travel in the original charging zone

Change the way that the scheme operates

Don't know (don't read out)

20. With regard to changing the way that the scheme operates, I would like you to say how much you support or oppose each of the following three options on a scale of 1 to 5, where 1 = 'strongly support' and 5 = 'strongly oppose'. (READ OUT – SINGLE CODE ONLY FOR EACH question)

Introduce an account based payment system across the both the original charging zone and the western extension so that drivers can have the charge debited from the account automatically and would not have to worry about forgetting to pay the charge and getting a penalty charge. It would also allow residents to pay for a single charging day's travel in the zone.

Strongly support

Support

Neither

Oppose

Strongly oppose

Don't know

Introduce a charge-free period in the middle of the day in the Western Extension. Driving in the original zone, or during charged hours in the Western Extension, would still cost £8

Strongly support

Support

Neither

Oppose

Strongly oppose

Don't know

Increase the residents' discount from 90% to 100% across both the original charging zone and the western extension so that residents would not be liable to pay the charge

Strongly support

Support
Neither
Oppose
Strongly oppose
Don't know

[READ OUT FURTHER DESCRIPTION OF OPTIONS FROM LEAFLET ONLY
IF NEEDED]

**21. Are there any other changes you would like to see made to the
Western Extension? (OPEN ENDED)**

Thanks and close.