

# LCCI – QES Q1 2016

## METHODOLOGY NOTE

ComRes interviewed 506 London business decision makers online between 1<sup>st</sup> and 22<sup>nd</sup> February 2016. Data were weighted to be representative of all London businesses by company size and broad industry sector. ComRes is a member of the British Polling Council and abides by its rules.

*All press releases or other publications must be checked with ComRes before use. ComRes requires 48 hours to check a press release unless otherwise agreed.*

To commission a voting intention poll or a public opinion survey please contact Katharine Peacock: [katharine.peacock@comres.co.uk](mailto:katharine.peacock@comres.co.uk)

To register for Pollwatch, a monthly newsletter update on the polls, please email: [pollwatch@comres.co.uk](mailto:pollwatch@comres.co.uk)

# Topical Q1 2016

Road Usage Q1\_SUM. To what extent, if at all, do you support or oppose the following potential changes to road usage? SUMMARY TABLE ..... 1  
 Base: All respondents

Road Usage Q1\_1. To what extent, if at all, do you support or oppose the following potential changes to road usage? Extension of the cycle superhighway scheme ..... 2  
 Base: All respondents

Road Usage Q1\_2. To what extent, if at all, do you support or oppose the following potential changes to road usage? A rush-hour lorry ban in the congestion charge zone ..... 4  
 Base: All respondents

Road Usage Q1\_3. To what extent, if at all, do you support or oppose the following potential changes to road usage? A relaxation of night-time delivery rules (such as extended hours or increased permitted frequency) ..... 6  
 Base: All respondents

Road Usage Q1\_4. To what extent, if at all, do you support or oppose the following potential changes to road usage? A cap on the number of minicabs and taxis ..... 8  
 Base: All respondents

Road Usage Q1\_5. To what extent, if at all, do you support or oppose the following potential changes to road usage? An ultra low emission zone requiring all vehicles driving through the current congestion charge zone at any time to meet stricter emission standards or pay a daily charge ..... 10  
 Base: All respondents

Road Usage Q1\_6. To what extent, if at all, do you support or oppose the following potential changes to road usage? Pedestrianisation of Oxford Street ..... 12  
 Base: All respondents

## Topical Q1 2016

### Road Usage

**Q1\_SUM. To what extent, if at all, do you support or oppose the following potential changes to road usage?**

#### SUMMARY TABLE

Base: All respondents

|  | Total       | Strongly support | Tend to support | Tend to oppose | Strongly oppose | Don't know | NETS       |            |      |
|--|-------------|------------------|-----------------|----------------|-----------------|------------|------------|------------|------|
|  |             |                  |                 |                |                 |            | Support    | Oppose     | Mean |
| A rush-hour lorry ban in the congestion charge zone  | 506<br>100% | 198<br>39%       | 181<br>36%      | 62<br>12%      | 24<br>5%        | 40<br>8%   | 380<br>75% | 86<br>17%  | 3.2  |
| Pedestrianisation of Oxford Street   | 506<br>100% | 153<br>30%       | 193<br>38%      | 72<br>14%      | 40<br>8%        | 48<br>10%  | 346<br>68% | 112<br>22% | 3.0  |
| A relaxation of night-time delivery rules (such as extended hours or increased permitted frequency)  | 506<br>100% | 113<br>22%       | 225<br>44%      | 76<br>15%      | 35<br>7%        | 58<br>11%  | 338<br>67% | 111<br>22% | 2.9  |
| An ultra low emission zone requiring all vehicles driving through the current congestion charge zone at any time to meet stricter emission standards or pay a daily charge | 506<br>100% | 157<br>31%       | 177<br>35%      | 86<br>17%      | 46<br>9%        | 40<br>8%   | 334<br>66% | 131<br>26% | 3.0  |
| Extension of the cycle superhighway scheme   | 506<br>100% | 128<br>25%       | 173<br>34%      | 78<br>15%      | 78<br>15%       | 49<br>10%  | 301<br>59% | 156<br>31% | 2.8  |
| A cap on the number of minicabs and taxis  | 506<br>100% | 110<br>22%       | 159<br>31%      | 129<br>26%     | 47<br>9%        | 61<br>12%  | 269<br>53% | 177<br>35% | 2.7  |

## Topical Q1 2016

### Road Usage

**Q1\_1. To what extent, if at all, do you support or oppose the following potential changes to road usage?**

#### Extension of the cycle superhighway scheme

Base: All respondents

|                    | Total   | BUSINESS SIZE |      | INDUSTRY                                     |                         |   |                             |   |                                      |  |  | MANUFACTURING/SERVICES |          |
|--------------------|---------|---------------|------|--|-------------------------|---|-----------------------------|---|--------------------------------------|--|--|------------------------|----------|
|                    |         | 0-9           | 10+  | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services |
| Unweighted Total   | 506     | 353           | 153  | 11   | 58                      | 165   | 38                          | 96  | 61                                   | 24   | 53   | 45                     | 461      |
| Weighted Total     | 506     | 453           | 53   | 18   | 70                      | 105   | 67                          | 58  | 120                                  | 30   | 38   | 55                     | 451      |
|                    | 100%    | 100%          | 100% | 100%   | 100%                    | 100%  | 100%                        | 100%  | 100%                                 | 100%   | 100%   | 100%                   | 100%     |
| Strongly support   | (4) 128 | 112           | 16   | 1  | 32                      | 30  | 17                          | 14  | 20                                   | 6  | 7  | 25                     | 103      |
|                    | 25%     | 25%           | 30%  | 8%   | 46%                     | 28%   | 25%                         | 24%   | 17%                                  | 21%  | 19%  | 45%                    | 23%      |
| Tend to support    | (3) 173 | 156           | 17   | 12   | 22                      | 44  | 19                          | 23  | 40                                   | 4  | 9  | 20                     | 153      |
|                    | 34%     | 34%           | 32%  | 65%  | 31%                     | 42%   | 29%                         | 40%   | 34%                                  | 13%  | 23%  | 37%                    | 34%      |
| Tend to oppose     | (2) 78  | 69            | 9    | 3  | 3                       | 15  | 10                          | 10  | 25                                   | 8  | 4  | 4                      | 74       |
|                    | 15%     | 15%           | 16%  | 18%  | 4%                      | 14%   | 14%                         | 18%   | 21%                                  | 27%  | 12%  | 7%                     | 16%      |
| Strongly oppose    | (1) 78  | 72            | 6    | 1  | 8                       | 10  | 14                          | 7   | 26                                   | 8  | 4  | 1                      | 77       |
|                    | 15%     | 16%           | 11%  | 4%   | 11%                     | 10%   | 21%                         | 13%   | 22%                                  | 27%  | 11%  | 2%                     | 17%      |
| Don't know         | 49      | 43            | 6    | 1  | 6                       | 6   | 8                           | 3   | 9                                    | 4  | 14   | 5                      | 44       |
|                    | 10%     | 9%            | 11%  | 5%   | 8%                      | 6%  | 11%                         | 5%  | 7%                                   | 12%  | 36%  | 9%                     | 10%      |
| <b>NETS</b>        |         |               |      |  |                         |   |                             |   |                                      |  |  |                        |          |
| Net: Support       | 301     | 268           | 33   | 13   | 54                      | 74  | 36                          | 37  | 61                                   | 10   | 16   | 45                     | 256      |
|                    | 59%     | 59%           | 62%  | 73%  | 77%                     | 70%   | 53%                         | 64%   | 51%                                  | 34%  | 42%  | 82%                    | 57%      |
| Net: Oppose        | 156     | 142           | 14   | 4  | 11                      | 25  | 24                          | 18  | 51                                   | 16   | 8  | 5                      | 151      |
|                    | 31%     | 31%           | 27%  | 22%  | 15%                     | 24%   | 35%                         | 31%   | 42%                                  | 54%  | 22%  | 9%                     | 34%      |
| Mean score         | 2.8     | 2.8           | 2.9  | 2.8  | 3.2                     | 2.9   | 2.6                         | 2.8   | 2.5                                  | 2.3  | 2.8  | 3.4                    | 2.7      |
| Standard deviation | 1.04    | 1.04          | 1.01 | .66  | 1.00                    | .93   | 1.13                        | .97   | 1.05                                 | 1.16   | 1.07   | .73                    | 1.05     |
| Standard error     | .05     | .06           | .09  | .21  | .14                     | .07   | .20                         | .10   | .14                                  | .25  | .18  | .11                    | .05      |

## Topical Q1 2016

### Road Usage

Q1\_1. To what extent, if at all, do you support or oppose the following potential changes to road usage?

#### Extension of the cycle superhighway scheme

Base: All respondents

|                    | Total   | LOCATION     |              | EXPECTED CHANGES IN WORKFORCE SIZE |               |      | PAST RECRUITMENT |                        | CAPACITY      |                | EXPECTED PRICES |               |      | VI     |       |            |
|--------------------|---------|--------------|--------------|------------------------------------|---------------|------|------------------|------------------------|---------------|----------------|-----------------|---------------|------|--------|-------|------------|
|                    |         | Inner London | Outer London | Increase                           | Stay the same | Fall | Tried to recruit | Did not try to recruit | Full capacity | Below capacity | Rise            | Stay the same | Fall | Remain | Leave | Don't know |
| Unweighted Total   | 506     | 300          | 206          | 125                                | 350           | 31   | 164              | 342                    | 260           | 246            | 103             | 369           | 34   | 304    | 143   | 59         |
| Weighted Total     | 506     | 283          | 223          | 105                                | 365           | 36   | 125              | 381                    | 244           | 262            | 102             | 365           | 39   | 293    | 148   | 65         |
|                    | 100%    | 100%         | 100%         | 100%                               | 100%          | 100% | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100% | 100%   | 100%  | 100%       |
| Strongly support   | (4) 128 | 99           | 29           | 48                                 | 69            | 11   | 50               | 78                     | 78            | 50             | 38              | 81            | 9    | 86     | 36    | 6          |
|                    | 25%     | 35%          | 13%          | 46%                                | 19%           | 30%  | 40%              | 20%                    | 32%           | 19%            | 38%             | 22%           | 22%  | 29%    | 24%   | 9%         |
| Tend to support    | (3) 173 | 94           | 79           | 33                                 | 131           | 9    | 34               | 139                    | 83            | 90             | 33              | 130           | 10   | 111    | 36    | 26         |
|                    | 34%     | 33%          | 35%          | 31%                                | 36%           | 25%  | 27%              | 36%                    | 34%           | 34%            | 33%             | 35%           | 26%  | 38%    | 24%   | 40%        |
| Tend to oppose     | (2) 78  | 30           | 48           | 12                                 | 63            | 3    | 21               | 57                     | 28            | 50             | 13              | 60            | 4    | 42     | 25    | 11         |
|                    | 15%     | 11%          | 21%          | 12%                                | 17%           | 9%   | 17%              | 15%                    | 12%           | 19%            | 13%             | 16%           | 12%  | 14%    | 17%   | 16%        |
| Strongly oppose    | (1) 78  | 34           | 44           | 4                                  | 67            | 8    | 12               | 66                     | 34            | 44             | 12              | 57            | 9    | 33     | 36    | 10         |
|                    | 15%     | 12%          | 20%          | 3%                                 | 18%           | 21%  | 10%              | 17%                    | 14%           | 17%            | 12%             | 16%           | 22%  | 11%    | 24%   | 15%        |
| Don't know         | 49      | 25           | 24           | 8                                  | 35            | 5    | 8                | 41                     | 19            | 30             | 5               | 37            | 7    | 21     | 15    | 13         |
|                    | 10%     | 9%           | 11%          | 8%                                 | 10%           | 14%  | 6%               | 11%                    | 8%            | 11%            | 5%              | 10%           | 18%  | 7%     | 10%   | 20%        |
| <b>NETS</b>        |         |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |        |       |            |
| Net: Support       | 301     | 193          | 108          | 81                                 | 200           | 20   | 85               | 216                    | 162           | 139            | 72              | 210           | 19   | 197    | 72    | 32         |
|                    | 59%     | 68%          | 48%          | 77%                                | 55%           | 56%  | 67%              | 57%                    | 66%           | 53%            | 70%             | 58%           | 49%  | 67%    | 48%   | 49%        |
| Net: Oppose        | 156     | 65           | 92           | 16                                 | 130           | 11   | 33               | 123                    | 63            | 93             | 25              | 118           | 13   | 75     | 61    | 20         |
|                    | 31%     | 23%          | 41%          | 15%                                | 35%           | 30%  | 26%              | 32%                    | 26%           | 36%            | 25%             | 32%           | 34%  | 26%    | 41%   | 31%        |
| Mean score         | 2.8     | 3.0          | 2.5          | 3.3                                | 2.6           | 2.8  | 3.0              | 2.7                    | 2.9           | 2.6            | 3.0             | 2.7           | 2.6  | 2.9    | 2.5   | 2.5        |
| Standard deviation | 1.04    | 1.02         | .99          | .83                                | 1.03          | 1.20 | 1.01             | 1.03                   | 1.04          | 1.02           | 1.02            | 1.02          | 1.17 | .97    | 1.16  | .93        |
| Standard error     | .05     | .06          | .07          | .08                                | .06           | .23  | .08              | .06                    | .07           | .07            | .10             | .06           | .22  | .06    | .10   | .14        |

## Topical Q1 2016

### Road Usage

#### Q1\_2. To what extent, if at all, do you support or oppose the following potential changes to road usage?

##### A rush-hour lorry ban in the congestion charge zone

Base: All respondents

|                    | Total   | BUSINESS SIZE |      | INDUSTRY                                     |                         |   |                             |   |                                      |  |  | MANUFACTURING/SERVICES |          |
|--------------------|---------|---------------|------|--|-------------------------|---|-----------------------------|---|--------------------------------------|--|--|------------------------|----------|
|                    |         | 0-9           | 10+  | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services |
| Unweighted Total   | 506     | 353           | 153  | 11   | 58                      | 165   | 38                          | 96  | 61                                   | 24   | 53   | 45                     | 461      |
| Weighted Total     | 506     | 453           | 53   | 18   | 70                      | 105   | 67                          | 58  | 120                                  | 30   | 38   | 55                     | 451      |
|                    | 100%    | 100%          | 100% | 100%   | 100%                    | 100%  | 100%                        | 100%  | 100%                                 | 100%   | 100%   | 100%                   | 100%     |
| Strongly support   | (4) 198 | 179           | 19   | 6  | 37                      | 31  | 37                          | 20  | 46                                   | 12   | 10   | 26                     | 172      |
|                    | 39%     | 39%           | 37%  | 32%  | 52%                     | 30%   | 56%                         | 34%   | 38%                                  | 40%  | 25%  | 47%                    | 38%      |
| Tend to support    | (3) 181 | 167           | 14   | 3  | 22                      | 49  | 11                          | 18  | 53                                   | 10   | 16   | 16                     | 166      |
|                    | 36%     | 37%           | 27%  | 18%  | 31%                     | 46%   | 16%                         | 31%   | 44%                                  | 32%  | 43%  | 28%                    | 37%      |
| Tend to oppose     | (2) 62  | 52            | 10   | 7  | 3                       | 14  | 7                           | 10  | 12                                   | 5  | 4  | 10                     | 52       |
|                    | 12%     | 11%           | 20%  | 41%  | 5%                      | 13%   | 10%                         | 18%   | 10%                                  | 16%  | 10%  | 19%                    | 12%      |
| Strongly oppose    | (1) 24  | 21            | 3    | 1  | 5                       | 7   | 2                           | 6   | 3                                    | -  | 1  | 1                      | 22       |
|                    | 5%      | 5%            | 5%   | 4%   | 6%                      | 6%  | 3%                          | 11%   | 2%                                   | -  | 2%   | 3%                     | 5%       |
| Don't know         | 40      | 34            | 6    | 1  | 4                       | 4   | 10                          | 4   | 6                                    | 4  | 8  | 2                      | 38       |
|                    | 8%      | 8%            | 11%  | 5%   | 6%                      | 4%  | 14%                         | 6%  | 5%                                   | 12%  | 20%  | 3%                     | 9%       |
| <b>NETS</b>        |         |               |      |  |                         |   |                             |   |                                      |  |  |                        |          |
| Net: Support       | 380     | 346           | 34   | 9  | 58                      | 80  | 48                          | 38  | 99                                   | 22   | 26   | 42                     | 338      |
|                    | 75%     | 76%           | 64%  | 50%  | 83%                     | 76%   | 72%                         | 65%   | 82%                                  | 72%  | 68%  | 76%                    | 75%      |
| Net: Oppose        | 86      | 73            | 13   | 8  | 8                       | 21  | 9                           | 16  | 15                                   | 5  | 5  | 12                     | 74       |
|                    | 17%     | 16%           | 25%  | 45%  | 11%                     | 20%   | 14%                         | 28%   | 12%                                  | 16%  | 12%  | 21%                    | 16%      |
| Mean score         | 3.2     | 3.2           | 3.1  | 2.8  | 3.4                     | 3.0   | 3.4                         | 2.9   | 3.3                                  | 3.3  | 3.1  | 3.2                    | 3.2      |
| Standard deviation | .85     | .85           | .94  | .99  | .87                     | .85   | .86                         | 1.01  | .74                                  | .76  | .74  | .86                    | .85      |
| Standard error     | .04     | .05           | .08  | .31  | .12                     | .07   | .15                         | .11   | .10                                  | .16  | .11  | .13                    | .04      |

## Topical Q1 2016

### Road Usage

#### Q1\_2. To what extent, if at all, do you support or oppose the following potential changes to road usage?

##### A rush-hour lorry ban in the congestion charge zone

Base: All respondents

|                    | Total   | LOCATION     |              | EXPECTED CHANGES IN WORKFORCE SIZE |               |      | PAST RECRUITMENT |                        | CAPACITY      |                | EXPECTED PRICES |               |      | VI     |       |            |
|--------------------|---------|--------------|--------------|------------------------------------|---------------|------|------------------|------------------------|---------------|----------------|-----------------|---------------|------|--------|-------|------------|
|                    |         | Inner London | Outer London | Increase                           | Stay the same | Fall | Tried to recruit | Did not try to recruit | Full capacity | Below capacity | Rise            | Stay the same | Fall | Remain | Leave | Don't know |
| Unweighted Total   | 506     | 300          | 206          | 125                                | 350           | 31   | 164              | 342                    | 260           | 246            | 103             | 369           | 34   | 304    | 143   | 59         |
| Weighted Total     | 506     | 283          | 223          | 105                                | 365           | 36   | 125              | 381                    | 244           | 262            | 102             | 365           | 39   | 293    | 148   | 65         |
|                    | 100%    | 100%         | 100%         | 100%                               | 100%          | 100% | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100% | 100%   | 100%  | 100%       |
| Strongly support   | (4) 198 | 131          | 67           | 51                                 | 135           | 12   | 55               | 143                    | 104           | 95             | 51              | 133           | 15   | 120    | 64    | 14         |
|                    | 39%     | 47%          | 30%          | 49%                                | 37%           | 34%  | 44%              | 38%                    | 43%           | 36%            | 50%             | 36%           | 37%  | 41%    | 43%   | 22%        |
| Tend to support    | (3) 181 | 90           | 91           | 29                                 | 139           | 13   | 35               | 146                    | 77            | 104            | 29              | 143           | 10   | 103    | 56    | 22         |
|                    | 36%     | 32%          | 41%          | 27%                                | 38%           | 37%  | 28%              | 38%                    | 32%           | 40%            | 28%             | 39%           | 25%  | 35%    | 38%   | 34%        |
| Tend to oppose     | (2) 62  | 29           | 33           | 18                                 | 41            | 3    | 21               | 41                     | 27            | 35             | 10              | 48            | 4    | 38     | 13    | 11         |
|                    | 12%     | 10%          | 15%          | 18%                                | 11%           | 9%   | 17%              | 11%                    | 11%           | 13%            | 10%             | 13%           | 10%  | 13%    | 9%    | 17%        |
| Strongly oppose    | (1) 24  | 10           | 14           | 5                                  | 16            | 3    | 11               | 13                     | 12            | 12             | 6               | 13            | 6    | 11     | 9     | 4          |
|                    | 5%      | 3%           | 6%           | 4%                                 | 4%            | 9%   | 9%               | 3%                     | 5%            | 5%             | 6%              | 3%            | 14%  | 4%     | 6%    | 7%         |
| Don't know         | 40      | 22           | 18           | 2                                  | 34            | 4    | 3                | 37                     | 24            | 16             | 6               | 29            | 5    | 21     | 6     | 13         |
|                    | 8%      | 8%           | 8%           | 2%                                 | 9%            | 12%  | 3%               | 10%                    | 10%           | 6%             | 6%              | 8%            | 13%  | 7%     | 4%    | 20%        |
| <b>NETS</b>        |         |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |        |       |            |
| Net: Support       | 380     | 221          | 158          | 80                                 | 275           | 25   | 90               | 289                    | 181           | 199            | 80              | 275           | 24   | 223    | 120   | 37         |
|                    | 75%     | 78%          | 71%          | 76%                                | 75%           | 70%  | 72%              | 76%                    | 74%           | 76%            | 79%             | 75%           | 62%  | 76%    | 81%   | 56%        |
| Net: Oppose        | 86      | 39           | 47           | 23                                 | 57            | 6    | 32               | 55                     | 39            | 47             | 16              | 61            | 10   | 49     | 21    | 16         |
|                    | 17%     | 14%          | 21%          | 22%                                | 16%           | 18%  | 25%              | 14%                    | 16%           | 18%            | 16%             | 17%           | 25%  | 17%    | 14%   | 24%        |
| Mean score         | 3.2     | 3.3          | 3.0          | 3.2                                | 3.2           | 3.1  | 3.1              | 3.2                    | 3.2           | 3.1            | 3.3             | 3.2           | 3.0  | 3.2    | 3.2   | 2.9        |
| Standard deviation | .85     | .82          | .88          | .90                                | .83           | .96  | .99              | .80                    | .87           | .84            | .89             | .81           | 1.11 | .83    | .86   | .91        |
| Standard error     | .04     | .05          | .06          | .08                                | .05           | .18  | .08              | .05                    | .06           | .06            | .09             | .04           | .20  | .05    | .07   | .14        |

## Topical Q1 2016

### Road Usage

#### Q1\_3. To what extent, if at all, do you support or oppose the following potential changes to road usage?

##### A relaxation of night-time delivery rules (such as extended hours or increased permitted frequency)

Base: All respondents

|                    | BUSINESS SIZE  |            |           | INDUSTRY                                     |                         |   |                             |   |                                      |  |  | MANUFACTURING/SERVICES |            |
|--------------------|----------------|------------|-----------|--|-------------------------|---|-----------------------------|---|--------------------------------------|--|--|------------------------|------------|
|                    | Total          | 0-9        | 10+       | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services   |
| Unweighted Total   | 506            | 353        | 153       | 11   | 58                      | 165   | 38                          | 96  | 61                                   | 24   | 53   | 45                     | 461        |
| Weighted Total     | 506            | 453        | 53        | 18   | 70                      | 105   | 67                          | 58  | 120                                  | 30   | 38   | 55                     | 451        |
|                    | 100%           | 100%       | 100%      | 100%   | 100%                    | 100%  | 100%                        | 100%  | 100%                                 | 100%   | 100%   | 100%                   | 100%       |
| Strongly support   | (4) 113<br>22% | 101<br>22% | 12<br>22% | 5<br>27%                                     | 27<br>39%               | 24<br>23%   | 10<br>15%                   | 11<br>19%   | 25<br>21%                            | 7<br>24%   | 3<br>8%  | 25<br>45%              | 88<br>20%  |
| Tend to support    | (3) 225<br>44% | 200<br>44% | 25<br>47% | 13<br>73%                                    | 30<br>42%               | 61<br>58%   | 29<br>44%                   | 26<br>46%   | 38<br>32%                            | 13<br>42%  | 14<br>37%  | 26<br>46%              | 199<br>44% |
| Tend to oppose     | (2) 76<br>15%  | 66<br>15%  | 9<br>18%  | -<br>-                                       | 6<br>9%                 | 11<br>11%   | 12<br>17%                   | 13<br>23%   | 20<br>16%                            | 6<br>22%   | 8<br>20%   | 1<br>1%                | 75<br>17%  |
| Strongly oppose    | (1) 35<br>7%   | 34<br>7%   | 1<br>3%   | -<br>-                                       | 2<br>3%                 | 3<br>3%   | 2<br>3%                     | 3<br>6%   | 21<br>17%                            | -<br>-   | 3<br>9%  | 2<br>3%                | 34<br>7%   |
| Don't know         | 58<br>11%      | 52<br>12%  | 5<br>10%  | -<br>-                                       | 5<br>7%                 | 5<br>5%   | 14<br>21%                   | 4<br>7%   | 16<br>13%                            | 4<br>12%   | 10<br>27%  | 2<br>4%                | 55<br>12%  |
| <b>NETS</b>        |                |            |           |  |                         |   |                             |   |                                      |  |  |                        |            |
| Net: Support       | 338<br>67%     | 301<br>66% | 36<br>69% | 18<br>100%                                   | 57<br>81%               | 85<br>82%   | 39<br>58%                   | 38<br>65%   | 64<br>53%                            | 20<br>66%  | 17<br>44%  | 50<br>91%              | 287<br>64% |
| Net: Oppose        | 111<br>22%     | 100<br>22% | 11<br>21% | -<br>-                                       | 8<br>12%                | 14<br>14%   | 14<br>21%                   | 16<br>28%   | 40<br>34%                            | 6<br>22%   | 11<br>29%  | 3<br>5%                | 108<br>24% |
| Mean score         | 2.9            | 2.9        | 3.0       | 3.3  | 3.3                     | 3.1   | 2.9                         | 2.8   | 2.7                                  | 3.0  | 2.6  | 3.4                    | 2.9        |
| Standard deviation | .85            | .87        | .76       | .45  | .77                     | .70   | .76                         | .82   | 1.06                                 | .73  | .85  | .69                    | .86        |
| Standard error     | .04            | .05        | .07       | .14  | .11                     | .06   | .14                         | .09   | .15                                  | .16  | .13  | .11                    | .04        |

## Topical Q1 2016

### Road Usage

#### Q1\_3. To what extent, if at all, do you support or oppose the following potential changes to road usage?

##### A relaxation of night-time delivery rules (such as extended hours or increased permitted frequency)

Base: All respondents

|                    | Total   | LOCATION     |              | EXPECTED CHANGES IN WORKFORCE SIZE |               |      | PAST RECRUITMENT |                        | CAPACITY      |                | EXPECTED PRICES |               |      | VI     |       |            |
|--------------------|---------|--------------|--------------|------------------------------------|---------------|------|------------------|------------------------|---------------|----------------|-----------------|---------------|------|--------|-------|------------|
|                    |         | Inner London | Outer London | Increase                           | Stay the same | Fall | Tried to recruit | Did not try to recruit | Full capacity | Below capacity | Rise            | Stay the same | Fall | Remain | Leave | Don't know |
| Unweighted Total   | 506     | 300          | 206          | 125                                | 350           | 31   | 164              | 342                    | 260           | 246            | 103             | 369           | 34   | 304    | 143   | 59         |
| Weighted Total     | 506     | 283          | 223          | 105                                | 365           | 36   | 125              | 381                    | 244           | 262            | 102             | 365           | 39   | 293    | 148   | 65         |
|                    | 100%    | 100%         | 100%         | 100%                               | 100%          | 100% | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100% | 100%   | 100%  | 100%       |
| Strongly support   | (4) 113 | 73           | 40           | 40                                 | 65            | 8    | 51               | 61                     | 68            | 45             | 48              | 59            | 6    | 57     | 43    | 13         |
|                    | 22%     | 26%          | 18%          | 38%                                | 18%           | 23%  | 41%              | 16%                    | 28%           | 17%            | 47%             | 16%           | 15%  | 19%    | 29%   | 20%        |
| Tend to support    | (3) 225 | 122          | 103          | 42                                 | 168           | 15   | 47               | 178                    | 90            | 134            | 38              | 168           | 19   | 132    | 67    | 26         |
|                    | 44%     | 43%          | 46%          | 40%                                | 46%           | 42%  | 38%              | 47%                    | 37%           | 51%            | 38%             | 46%           | 49%  | 45%    | 46%   | 39%        |
| Tend to oppose     | (2) 76  | 38           | 37           | 14                                 | 58            | 3    | 14               | 61                     | 33            | 42             | 4               | 61            | 10   | 50     | 13    | 12         |
|                    | 15%     | 14%          | 17%          | 14%                                | 16%           | 8%   | 11%              | 16%                    | 14%           | 16%            | 4%              | 17%           | 27%  | 17%    | 9%    | 19%        |
| Strongly oppose    | (1) 35  | 17           | 19           | 2                                  | 32            | 2    | 4                | 32                     | 21            | 14             | 2               | 30            | 3    | 20     | 13    | 2          |
|                    | 7%      | 6%           | 8%           | 1%                                 | 9%            | 5%   | 3%               | 8%                     | 9%            | 5%             | 2%              | 8%            | 7%   | 7%     | 9%    | 2%         |
| Don't know         | 58      | 33           | 24           | 7                                  | 42            | 8    | 9                | 49                     | 31            | 26             | 10              | 47            | 1    | 34     | 11    | 13         |
|                    | 11%     | 12%          | 11%          | 7%                                 | 12%           | 22%  | 7%               | 13%                    | 13%           | 10%            | 9%              | 13%           | 2%   | 12%    | 7%    | 20%        |
| <b>NETS</b>        |         |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |        |       |            |
| Net: Support       | 338     | 194          | 143          | 82                                 | 233           | 23   | 99               | 239                    | 158           | 179            | 86              | 227           | 25   | 189    | 110   | 39         |
|                    | 67%     | 69%          | 64%          | 78%                                | 64%           | 65%  | 79%              | 63%                    | 65%           | 68%            | 85%             | 62%           | 64%  | 64%    | 75%   | 59%        |
| Net: Oppose        | 111     | 55           | 56           | 16                                 | 90            | 5    | 18               | 93                     | 54            | 57             | 6               | 92            | 13   | 70     | 27    | 14         |
|                    | 22%     | 19%          | 25%          | 15%                                | 25%           | 13%  | 14%              | 24%                    | 22%           | 22%            | 6%              | 25%           | 34%  | 24%    | 18%   | 21%        |
| Mean score         | 2.9     | 3.0          | 2.8          | 3.2                                | 2.8           | 3.1  | 3.3              | 2.8                    | 3.0           | 2.9            | 3.4             | 2.8           | 2.7  | 2.9    | 3.0   | 3.0        |
| Standard deviation | .85     | .85          | .86          | .76                                | .87           | .82  | .79              | .85                    | .93           | .78            | .69             | .85           | .82  | .84    | .90   | .78        |
| Standard error     | .04     | .05          | .06          | .07                                | .05           | .16  | .06              | .05                    | .06           | .05            | .07             | .05           | .14  | .05    | .08   | .11        |

## Topical Q1 2016

### Road Usage

#### Q1\_4. To what extent, if at all, do you support or oppose the following potential changes to road usage?

##### A cap on the number of minicabs and taxis

Base: All respondents

|                    | Total   | BUSINESS SIZE |      | INDUSTRY                                     |                         |   |                             |   |                                      |  |  | MANUFACTURING/SERVICES |          |
|--------------------|---------|---------------|------|--|-------------------------|---|-----------------------------|---|--------------------------------------|--|--|------------------------|----------|
|                    |         | 0-9           | 10+  | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services |
| Unweighted Total   | 506     | 353           | 153  | 11   | 58                      | 165   | 38                          | 96  | 61                                   | 24   | 53   | 45                     | 461      |
| Weighted Total     | 506     | 453           | 53   | 18   | 70                      | 105   | 67                          | 58  | 120                                  | 30   | 38   | 55                     | 451      |
|                    | 100%    | 100%          | 100% | 100%   | 100%                    | 100%  | 100%                        | 100%  | 100%                                 | 100%   | 100%   | 100%                   | 100%     |
| Strongly support   | (4) 110 | 100           | 10   | 5  | 24                      | 23  | 12                          | 10  | 28                                   | 6  | 2  | 24                     | 85       |
|                    | 22%     | 22%           | 18%  | 30%  | 35%                     | 22%   | 18%                         | 17%   | 23%                                  | 19%  | 5%   | 44%                    | 19%      |
| Tend to support    | (3) 159 | 143           | 16   | 1  | 18                      | 46  | 21                          | 23  | 27                                   | 12   | 10   | 10                     | 149      |
|                    | 31%     | 31%           | 31%  | 5%   | 26%                     | 44%   | 31%                         | 40%   | 23%                                  | 39%  | 27%  | 18%                    | 33%      |
| Tend to oppose     | (2) 129 | 112           | 17   | 9  | 11                      | 21  | 17                          | 12  | 36                                   | 8  | 15   | 11                     | 119      |
|                    | 26%     | 25%           | 32%  | 47%  | 16%                     | 20%   | 26%                         | 21%   | 30%                                  | 28%  | 40%  | 19%                    | 26%      |
| Strongly oppose    | (1) 47  | 43            | 4    | -  | 8                       | 7   | 5                           | 6   | 16                                   | 4  | 1  | 4                      | 43       |
|                    | 9%      | 10%           | 8%   | -  | 11%                     | 6%  | 7%                          | 11%   | 13%                                  | 13%  | 4%   | 7%                     | 10%      |
| Don't know         | 61      | 55            | 6    | 3  | 8                       | 8   | 12                          | 6   | 13                                   | *  | 9  | 6                      | 55       |
|                    | 12%     | 12%           | 11%  | 18%  | 12%                     | 8%  | 18%                         | 11%   | 11%                                  | 1%   | 24%  | 11%                    | 12%      |
| <b>NETS</b>        |         |               |      |  |                         |   |                             |   |                                      |  |  |                        |          |
| Net: Support       | 269     | 243           | 26   | 6  | 42                      | 69  | 33                          | 33  | 55                                   | 17   | 12   | 35                     | 234      |
|                    | 53%     | 54%           | 50%  | 35%  | 60%                     | 66%   | 49%                         | 57%   | 46%                                  | 58%  | 33%  | 63%                    | 52%      |
| Net: Oppose        | 177     | 156           | 21   | 9  | 19                      | 27  | 22                          | 19  | 52                                   | 12   | 17   | 15                     | 162      |
|                    | 35%     | 34%           | 40%  | 47%  | 28%                     | 26%   | 33%                         | 32%   | 43%                                  | 41%  | 43%  | 27%                    | 36%      |
| Mean score         | 2.7     | 2.8           | 2.7  | 2.8  | 2.9                     | 2.9   | 2.7                         | 2.7   | 2.6                                  | 2.6  | 2.5  | 3.1                    | 2.7      |
| Standard deviation | .95     | .95           | .90  | .97  | 1.05                    | .85   | .90                         | .93   | 1.03                                 | .96  | .71  | 1.02                   | .93      |
| Standard error     | .04     | .05           | .08  | .31  | .15                     | .07   | .16                         | .10   | .14                                  | .20  | .11  | .16                    | .05      |

## Topical Q1 2016

### Road Usage

#### Q1\_4. To what extent, if at all, do you support or oppose the following potential changes to road usage?

##### A cap on the number of minicabs and taxis

Base: All respondents

|                    | Total   | LOCATION     |              | EXPECTED CHANGES IN WORKFORCE SIZE |               |      | PAST RECRUITMENT |                        | CAPACITY      |                | EXPECTED PRICES |               |      | VI     |       |            |
|--------------------|---------|--------------|--------------|------------------------------------|---------------|------|------------------|------------------------|---------------|----------------|-----------------|---------------|------|--------|-------|------------|
|                    |         | Inner London | Outer London | Increase                           | Stay the same | Fall | Tried to recruit | Did not try to recruit | Full capacity | Below capacity | Rise            | Stay the same | Fall | Remain | Leave | Don't know |
| Unweighted Total   | 506     | 300          | 206          | 125                                | 350           | 31   | 164              | 342                    | 260           | 246            | 103             | 369           | 34   | 304    | 143   | 59         |
| Weighted Total     | 506     | 283          | 223          | 105                                | 365           | 36   | 125              | 381                    | 244           | 262            | 102             | 365           | 39   | 293    | 148   | 65         |
|                    | 100%    | 100%         | 100%         | 100%                               | 100%          | 100% | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100% | 100%   | 100%  | 100%       |
| Strongly support   | (4) 110 | 77           | 32           | 42                                 | 58            | 9    | 46               | 64                     | 69            | 40             | 36              | 63            | 11   | 48     | 49    | 12         |
|                    | 22%     | 27%          | 15%          | 40%                                | 16%           | 25%  | 37%              | 17%                    | 29%           | 15%            | 35%             | 17%           | 29%  | 16%    | 33%   | 19%        |
| Tend to support    | (3) 159 | 76           | 83           | 29                                 | 121           | 9    | 35               | 124                    | 74            | 85             | 21              | 128           | 9    | 96     | 45    | 18         |
|                    | 31%     | 27%          | 37%          | 28%                                | 33%           | 26%  | 28%              | 33%                    | 30%           | 32%            | 21%             | 35%           | 24%  | 33%    | 30%   | 27%        |
| Tend to oppose     | (2) 129 | 73           | 56           | 18                                 | 104           | 7    | 25               | 104                    | 53            | 76             | 26              | 96            | 8    | 82     | 31    | 17         |
|                    | 26%     | 26%          | 25%          | 17%                                | 29%           | 20%  | 20%              | 27%                    | 22%           | 29%            | 25%             | 26%           | 20%  | 28%    | 21%   | 26%        |
| Strongly oppose    | (1) 47  | 22           | 25           | 7                                  | 36            | 4    | 11               | 36                     | 19            | 29             | 12              | 29            | 7    | 29     | 17    | 2          |
|                    | 9%      | 8%           | 11%          | 7%                                 | 10%           | 10%  | 9%               | 10%                    | 8%            | 11%            | 11%             | 8%            | 17%  | 10%    | 11%   | 2%         |
| Don't know         | 61      | 34           | 27           | 8                                  | 46            | 7    | 9                | 52                     | 29            | 32             | 7               | 49            | 4    | 37     | 7     | 17         |
|                    | 12%     | 12%          | 12%          | 8%                                 | 12%           | 19%  | 7%               | 14%                    | 12%           | 12%            | 7%              | 13%           | 10%  | 13%    | 4%    | 26%        |
| <b>NETS</b>        |         |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |        |       |            |
| Net: Support       | 269     | 153          | 115          | 71                                 | 179           | 18   | 81               | 188                    | 143           | 125            | 57              | 191           | 20   | 144    | 94    | 30         |
|                    | 53%     | 54%          | 52%          | 68%                                | 49%           | 51%  | 65%              | 49%                    | 59%           | 48%            | 56%             | 52%           | 52%  | 49%    | 64%   | 46%        |
| Net: Oppose        | 177     | 95           | 81           | 26                                 | 140           | 11   | 36               | 141                    | 72            | 105            | 37              | 125           | 14   | 111    | 47    | 18         |
|                    | 35%     | 34%          | 36%          | 24%                                | 38%           | 29%  | 28%              | 37%                    | 29%           | 40%            | 37%             | 34%           | 37%  | 38%    | 32%   | 28%        |
| Mean score         | 2.7     | 2.8          | 2.6          | 3.1                                | 2.6           | 2.8  | 3.0              | 2.7                    | 2.9           | 2.6            | 2.9             | 2.7           | 2.7  | 2.6    | 2.9   | 2.8        |
| Standard deviation | .95     | .97          | .91          | .96                                | .91           | 1.02 | .99              | .92                    | .96           | .92            | 1.06            | .89           | 1.13 | .92    | 1.02  | .85        |
| Standard error     | .04     | .06          | .07          | .09                                | .05           | .20  | .08              | .05                    | .06           | .06            | .11             | .05           | .21  | .06    | .09   | .13        |

## Topical Q1 2016

### Road Usage

#### Q1\_5. To what extent, if at all, do you support or oppose the following potential changes to road usage?

##### An ultra low emission zone requiring all vehicles driving through the current congestion charge zone at any time to meet stricter emission standards or pay a daily charge

Base: All respondents

|                    | Total   | BUSINESS SIZE |      | INDUSTRY                                     |                         |   |                             |   |                                      |  |  | MANUFACTURING/SERVICES |          |
|--------------------|---------|---------------|------|--|-------------------------|---|-----------------------------|---|--------------------------------------|--|--|------------------------|----------|
|                    |         | 0-9           | 10+  | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services |
| Unweighted Total   | 506     | 353           | 153  | 11   | 58                      | 165   | 38                          | 96  | 61                                   | 24   | 53   | 45                     | 461      |
| Weighted Total     | 506     | 453           | 53   | 18   | 70                      | 105   | 67                          | 58  | 120                                  | 30   | 38   | 55                     | 451      |
|                    | 100%    | 100%          | 100% | 100%   | 100%                    | 100%  | 100%                        | 100%  | 100%                                 | 100%   | 100%   | 100%                   | 100%     |
| Strongly support   | (4) 157 | 144           | 13   | 8  | 24                      | 23  | 23                          | 14  | 45                                   | 9  | 12   | 27                     | 130      |
|                    | 31%     | 32%           | 24%  | 43%  | 34%                     | 22%   | 34%                         | 24%   | 38%                                  | 29%  | 32%  | 49%                    | 29%      |
| Tend to support    | (3) 177 | 157           | 20   | 7  | 24                      | 52  | 20                          | 26  | 31                                   | 6  | 11   | 19                     | 158      |
|                    | 35%     | 35%           | 38%  | 41%  | 35%                     | 50%   | 30%                         | 44%   | 26%                                  | 19%  | 29%  | 35%                    | 35%      |
| Tend to oppose     | (2) 86  | 75            | 11   | 1  | 14                      | 17  | 10                          | 10  | 24                                   | 4  | 5  | 5                      | 81       |
|                    | 17%     | 16%           | 21%  | 7%   | 20%                     | 16%   | 14%                         | 18%   | 20%                                  | 14%  | 12%  | 9%                     | 18%      |
| Strongly oppose    | (1) 46  | 43            | 3    | 1  | 6                       | 7   | 5                           | 6   | 16                                   | 5  | 1  | 1                      | 45       |
|                    | 9%      | 9%            | 6%   | 4%   | 8%                      | 6%  | 7%                          | 10%   | 13%                                  | 18%  | 2%   | 1%                     | 10%      |
| Don't know         | 40      | 35            | 5    | 1  | 2                       | 6   | 10                          | 3   | 4                                    | 6  | 9  | 3                      | 37       |
|                    | 8%      | 8%            | 10%  | 5%   | 3%                      | 6%  | 14%                         | 4%  | 3%                                   | 19%  | 24%  | 6%                     | 8%       |
| <b>NETS</b>        |         |               |      |  |                         |   |                             |   |                                      |  |  |                        |          |
| Net: Support       | 334     | 301           | 33   | 15   | 48                      | 75  | 43                          | 39  | 76                                   | 14   | 23   | 47                     | 288      |
|                    | 66%     | 66%           | 63%  | 84%  | 68%                     | 71%   | 65%                         | 68%   | 63%                                  | 48%  | 61%  | 84%                    | 64%      |
| Net: Oppose        | 131     | 117           | 14   | 2  | 20                      | 24  | 14                          | 16  | 40                                   | 10   | 6  | 6                      | 126      |
|                    | 26%     | 26%           | 27%  | 11%  | 29%                     | 23%   | 21%                         | 28%   | 33%                                  | 33%  | 15%  | 10%                    | 28%      |
| Mean score         | 3.0     | 3.0           | 2.9  | 3.3  | 3.0                     | 2.9   | 3.1                         | 2.9   | 2.9                                  | 2.7  | 3.2  | 3.4                    | 2.9      |
| Standard deviation | .96     | .96           | .88  | .81  | .96                     | .82   | .94                         | .92   | 1.07                                 | 1.19   | .83  | .72                    | .97      |
| Standard error     | .04     | .05           | .07  | .26  | .13                     | .07   | .16                         | .10   | .14                                  | .27  | .13  | .11                    | .05      |

## Topical Q1 2016

### Road Usage

#### Q1\_5. To what extent, if at all, do you support or oppose the following potential changes to road usage?

##### An ultra low emission zone requiring all vehicles driving through the current congestion charge zone at any time to meet stricter emission standards or pay a daily charge

Base: All respondents

|                    | Total   | LOCATION     |              | EXPECTED CHANGES IN WORKFORCE SIZE |               |      | PAST RECRUITMENT |                        | CAPACITY      |                | EXPECTED PRICES |               |      | VI     |       |            |
|--------------------|---------|--------------|--------------|------------------------------------|---------------|------|------------------|------------------------|---------------|----------------|-----------------|---------------|------|--------|-------|------------|
|                    |         | Inner London | Outer London | Increase                           | Stay the same | Fall | Tried to recruit | Did not try to recruit | Full capacity | Below capacity | Rise            | Stay the same | Fall | Remain | Leave | Don't know |
| Unweighted Total   | 506     | 300          | 206          | 125                                | 350           | 31   | 164              | 342                    | 260           | 246            | 103             | 369           | 34   | 304    | 143   | 59         |
| Weighted Total     | 506     | 283          | 223          | 105                                | 365           | 36   | 125              | 381                    | 244           | 262            | 102             | 365           | 39   | 293    | 148   | 65         |
|                    | 100%    | 100%         | 100%         | 100%                               | 100%          | 100% | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100% | 100%   | 100%  | 100%       |
| Strongly support   | (4) 157 | 97           | 60           | 50                                 | 96            | 11   | 57               | 100                    | 85            | 72             | 48              | 101           | 8    | 104    | 49    | 4          |
|                    | 31%     | 34%          | 27%          | 48%                                | 26%           | 30%  | 45%              | 26%                    | 35%           | 28%            | 47%             | 28%           | 20%  | 36%    | 33%   | 6%         |
| Tend to support    | (3) 177 | 101          | 76           | 35                                 | 130           | 12   | 43               | 134                    | 81            | 96             | 26              | 132           | 19   | 102    | 47    | 28         |
|                    | 35%     | 36%          | 34%          | 33%                                | 36%           | 34%  | 34%              | 35%                    | 33%           | 37%            | 26%             | 36%           | 49%  | 35%    | 32%   | 42%        |
| Tend to oppose     | (2) 86  | 46           | 39           | 12                                 | 71            | 2    | 11               | 75                     | 41            | 44             | 9               | 76            | 2    | 47     | 23    | 16         |
|                    | 17%     | 16%          | 18%          | 11%                                | 20%           | 7%   | 9%               | 20%                    | 17%           | 17%            | 8%              | 21%           | 4%   | 16%    | 15%   | 25%        |
| Strongly oppose    | (1) 46  | 13           | 32           | 3                                  | 38            | 6    | 9                | 37                     | 14            | 32             | 12              | 25            | 9    | 16     | 21    | 9          |
|                    | 9%      | 5%           | 14%          | 2%                                 | 10%           | 15%  | 7%               | 10%                    | 6%            | 12%            | 11%             | 7%            | 23%  | 5%     | 14%   | 14%        |
| Don't know         | 40      | 25           | 16           | 6                                  | 30            | 5    | 6                | 34                     | 23            | 17             | 7               | 32            | 2    | 24     | 8     | 9          |
|                    | 8%      | 9%           | 7%           | 6%                                 | 8%            | 13%  | 5%               | 9%                     | 10%           | 7%             | 7%              | 9%            | 4%   | 8%     | 5%    | 13%        |
| <b>NETS</b>        |         |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |        |       |            |
| Net: Support       | 334     | 198          | 136          | 84                                 | 227           | 23   | 100              | 235                    | 166           | 169            | 74              | 233           | 27   | 206    | 97    | 31         |
|                    | 66%     | 70%          | 61%          | 81%                                | 62%           | 64%  | 79%              | 62%                    | 68%           | 64%            | 73%             | 64%           | 69%  | 70%    | 65%   | 48%        |
| Net: Oppose        | 131     | 60           | 72           | 14                                 | 109           | 8    | 20               | 112                    | 55            | 77             | 20              | 101           | 10   | 62     | 44    | 26         |
|                    | 26%     | 21%          | 32%          | 14%                                | 30%           | 22%  | 16%              | 29%                    | 22%           | 29%            | 20%             | 28%           | 27%  | 21%    | 29%   | 39%        |
| Mean score         | 3.0     | 3.1          | 2.8          | 3.3                                | 2.9           | 2.9  | 3.2              | 2.9                    | 3.1           | 2.9            | 3.2             | 2.9           | 2.7  | 3.1    | 2.9   | 2.5        |
| Standard deviation | .96     | .87          | 1.03         | .79                                | .96           | 1.08 | .90              | .96                    | .90           | .99            | 1.03            | .91           | 1.07 | .89    | 1.05  | .84        |
| Standard error     | .04     | .05          | .07          | .07                                | .05           | .20  | .07              | .05                    | .06           | .07            | .11             | .05           | .19  | .05    | .09   | .12        |

## Topical Q1 2016

### Road Usage

**Q1\_6. To what extent, if at all, do you support or oppose the following potential changes to road usage?**

#### Pedestrianisation of Oxford Street

Base: All respondents

|                      | Total | BUSINESS SIZE |      | INDUSTRY                                     |                         |   |                             |   |                                      |  |  | MANUFACTURING/SERVICES |          |
|----------------------|-------|---------------|------|--|-------------------------|---|-----------------------------|---|--------------------------------------|--|--|------------------------|----------|
|                      |       | 0-9           | 10+  | Agriculture, forestry & fishing / production | Construction / property | Motor trades / wholesale / retail / transport & storage / accommodation & food services | Information & communication | Finance & insurance / business administration and support | Professional, scientific & technical | Public administration and defence / education / health | Arts, entertainment, recreation and other services | Manufacturing          | Services |
| Unweighted Total     | 506   | 353           | 153  | 11   | 58                      | 165   | 38                          | 96  | 61                                   | 24   | 53   | 45                     | 461      |
| Weighted Total       | 506   | 453           | 53   | 18   | 70                      | 105   | 67                          | 58  | 120                                  | 30   | 38   | 55                     | 451      |
|                      | 100%  | 100%          | 100% | 100%   | 100%                    | 100%  | 100%                        | 100%  | 100%                                 | 100%   | 100%   | 100%                   | 100%     |
| Strongly support (4) | 153   | 136           | 16   | 5  | 34                      | 25  | 19                          | 17  | 31                                   | 8  | 13   | 31                     | 122      |
|                      | 30%   | 30%           | 31%  | 30%  | 49%                     | 23%   | 29%                         | 29%   | 26%                                  | 27%  | 35%  | 56%                    | 27%      |
| Tend to support (3)  | 193   | 172           | 21   | 10   | 27                      | 54  | 23                          | 19  | 41                                   | 11   | 8  | 20                     | 174      |
|                      | 38%   | 38%           | 39%  | 53%  | 38%                     | 51%   | 34%                         | 34%   | 34%                                  | 37%  | 22%  | 36%                    | 39%      |
| Tend to oppose (2)   | 72    | 64            | 7    | 3  | 3                       | 16  | 15                          | 11  | 16                                   | 5  | 4  | 4                      | 68       |
|                      | 14%   | 14%           | 14%  | 18%  | 4%                      | 15%   | 22%                         | 19%   | 13%                                  | 16%  | 11%  | 7%                     | 15%      |
| Strongly oppose (1)  | 40    | 37            | 3    | -  | 4                       | 7   | 5                           | 5   | 16                                   | 2  | 1  | -                      | 40       |
|                      | 8%    | 8%            | 7%   | -  | 5%                      | 6%  | 8%                          | 9%  | 14%                                  | 6%   | 3%   | -                      | 9%       |
| Don't know           | 48    | 44            | 5    | -  | 3                       | 4   | 5                           | 6   | 16                                   | 4  | 11   | 1                      | 48       |
|                      | 10%   | 10%           | 9%   | -  | 4%                      | 4%  | 8%                          | 10%   | 13%                                  | 14%  | 29%  | 1%                     | 11%      |
| <b>NETS</b>          |       |               |      |  |                         |   |                             |   |                                      |  |  |                        |          |
| Net: Support         | 346   | 309           | 37   | 15   | 61                      | 78  | 42                          | 36  | 72                                   | 19   | 22   | 51                     | 295      |
|                      | 68%   | 68%           | 70%  | 82%  | 87%                     | 75%   | 63%                         | 63%   | 60%                                  | 64%  | 57%  | 91%                    | 66%      |
| Net: Oppose          | 112   | 101           | 11   | 3  | 6                       | 23  | 20                          | 16  | 32                                   | 7  | 5  | 4                      | 108      |
|                      | 22%   | 22%           | 21%  | 18%  | 9%                      | 21%   | 30%                         | 27%   | 27%                                  | 22%  | 14%  | 7%                     | 24%      |
| Mean score           | 3.0   | 3.0           | 3.0  | 3.1  | 3.4                     | 3.0   | 2.9                         | 2.9   | 2.8                                  | 3.0  | 3.3  | 3.5                    | 2.9      |
| Standard deviation   | .92   | .92           | .89  | .70  | .81                     | .82   | .94                         | .96   | 1.03                                 | .90  | .88  | .64                    | .93      |
| Standard error       | .04   | .05           | .08  | .21  | .11                     | .07   | .16                         | .10   | .14                                  | .20  | .14  | .10                    | .05      |

## Topical Q1 2016

### Road Usage

**Q1\_6. To what extent, if at all, do you support or oppose the following potential changes to road usage?**

#### Pedestrianisation of Oxford Street

Base: All respondents

|                    | Total   | LOCATION     |              | EXPECTED CHANGES IN WORKFORCE SIZE |               |      | PAST RECRUITMENT |                        | CAPACITY      |                | EXPECTED PRICES |               |      | VI     |       |            |
|--------------------|---------|--------------|--------------|------------------------------------|---------------|------|------------------|------------------------|---------------|----------------|-----------------|---------------|------|--------|-------|------------|
|                    |         | Inner London | Outer London | Increase                           | Stay the same | Fall | Tried to recruit | Did not try to recruit | Full capacity | Below capacity | Rise            | Stay the same | Fall | Remain | Leave | Don't know |
| Unweighted Total   | 506     | 300          | 206          | 125                                | 350           | 31   | 164              | 342                    | 260           | 246            | 103             | 369           | 34   | 304    | 143   | 59         |
| Weighted Total     | 506     | 283          | 223          | 105                                | 365           | 36   | 125              | 381                    | 244           | 262            | 102             | 365           | 39   | 293    | 148   | 65         |
|                    | 100%    | 100%         | 100%         | 100%                               | 100%          | 100% | 100%             | 100%                   | 100%          | 100%           | 100%            | 100%          | 100% | 100%   | 100%  | 100%       |
| Strongly support   | (4) 153 | 103          | 49           | 47                                 | 90            | 15   | 54               | 99                     | 81            | 72             | 47              | 92            | 14   | 99     | 45    | 9          |
|                    | 30%     | 37%          | 22%          | 45%                                | 25%           | 43%  | 43%              | 26%                    | 33%           | 27%            | 46%             | 25%           | 36%  | 34%    | 31%   | 13%        |
| Tend to support    | (3) 193 | 108          | 85           | 37                                 | 151           | 5    | 40               | 153                    | 97            | 97             | 27              | 152           | 14   | 111    | 53    | 29         |
|                    | 38%     | 38%          | 38%          | 36%                                | 41%           | 15%  | 32%              | 40%                    | 40%           | 37%            | 26%             | 42%           | 36%  | 38%    | 36%   | 44%        |
| Tend to oppose     | (2) 72  | 29           | 43           | 10                                 | 59            | 3    | 13               | 59                     | 29            | 43             | 9               | 57            | 6    | 44     | 24    | 5          |
|                    | 14%     | 10%          | 19%          | 10%                                | 16%           | 8%   | 10%              | 15%                    | 12%           | 16%            | 8%              | 16%           | 15%  | 15%    | 16%   | 7%         |
| Strongly oppose    | (1) 40  | 21           | 19           | 8                                  | 29            | 3    | 12               | 28                     | 14            | 26             | 12              | 23            | 5    | 17     | 15    | 7          |
|                    | 8%      | 7%           | 8%           | 7%                                 | 8%            | 9%   | 9%               | 7%                     | 6%            | 10%            | 12%             | 6%            | 13%  | 6%     | 10%   | 11%        |
| Don't know         | 48      | 21           | 27           | 3                                  | 37            | 9    | 7                | 42                     | 23            | 25             | 8               | 41            | -    | 22     | 10    | 16         |
|                    | 10%     | 7%           | 12%          | 3%                                 | 10%           | 25%  | 5%               | 11%                    | 10%           | 10%            | 7%              | 11%           | -    | 8%     | 7%    | 24%        |
| <b>NETS</b>        |         |              |              |                                    |               |      |                  |                        |               |                |                 |               |      |        |       |            |
| Net: Support       | 346     | 211          | 134          | 84                                 | 241           | 21   | 94               | 252                    | 177           | 168            | 74              | 244           | 28   | 210    | 99    | 38         |
|                    | 68%     | 75%          | 60%          | 80%                                | 66%           | 58%  | 75%              | 66%                    | 73%           | 64%            | 73%             | 67%           | 72%  | 72%    | 67%   | 57%        |
| Net: Oppose        | 112     | 50           | 62           | 18                                 | 88            | 6    | 24               | 87                     | 43            | 69             | 20              | 80            | 11   | 61     | 39    | 12         |
|                    | 22%     | 18%          | 28%          | 17%                                | 24%           | 17%  | 20%              | 23%                    | 18%           | 26%            | 20%             | 22%           | 28%  | 21%    | 26%   | 18%        |
| Mean score         | 3.0     | 3.1          | 2.8          | 3.2                                | 2.9           | 3.2  | 3.1              | 3.0                    | 3.1           | 2.9            | 3.2             | 3.0           | 2.9  | 3.1    | 2.9   | 2.8        |
| Standard deviation | .92     | .90          | .91          | .91                                | .90           | 1.07 | .97              | .89                    | .86           | .96            | 1.04            | .86           | 1.03 | .88    | .97   | .92        |
| Standard error     | .04     | .05          | .07          | .08                                | .05           | .21  | .08              | .05                    | .06           | .06            | .11             | .05           | .18  | .05    | .08   | .14        |