

Business West Clean Air Zone Survey, summary of key findings

Perceptions of the Clean Air Zone proposals

75.4% of respondents have concerns about the Clean Air Zone proposals. Common concerns include the following:

- Impacts on those who had previously been encouraged to buy Euro6 Diesel cars.
- Banning all diesel cars rather than the most polluting petrol and diesel vehicles.
- Impacts on access for both staff and customers / ability to visit clients.
- Inadequacy and cost of existing public transport provision.
- Displacement of traffic / parking / pollution to residential areas or areas just outside the zone.
- Impact on coach access for schools and tourists.
- Impact on deliveries (increased cost and reduced timing).
- Deterrence of visitors / customers.
- Impact on businesses that need to transport equipment through the centre.
- Increased costs for those working in the centre especially those on a lower income.
- Impact for charities and impact on access to hospitals / medical centres.

Comments also raised concerns that the plan hasn't been well thought through, has been rushed without consideration of the wider / economic impacts or of alternative proposals, that there was a lack of public consultation and that the implementation is too rapid.

Only 14.6% of respondents identified that they do not support the aims of the Clean Air Zone proposals or any restrictions on vehicle movement. With the majority (51%) identifying that they support it as a priority but as part of wider plan to reduce carbon and create an environmentally enhanced centre, alongside mitigation to avoid major social, cultural or economic harm arising.

Impact on businesses

61.9% of respondents stated that the Clean Air Zone proposals will have a negative or very negative impact on their business, 19.1% that proposals will have a positive or very positive impact on their business and 21.1% don't know. Respondents identified that the proposal may impact the following:

Potential impact on businesses	Percentage
The ability of their workforce to get to work	61.9%
The ability of customers/ visitors to get to the workplace / business	59.5%
The ability of customers/ visitors to get into Bristol	55.6%
The ability of delivery vehicles to get into Bristol	55.5%
The ability of their workforce to visit customers/ clients	50.7%
It will decrease the attractiveness of Bristol to visitors and investors	44.2%
The ability of their commercial vehicles to get into the city	33.9%
The ability of their commercial vehicles to move around the city region	31.5%
It will increase the attractiveness of Bristol to visitors and investors	23.2%

Comments regarding expected negative impacts reflected the concerns listed above alongside concerns regarding the impact of customers choosing to go elsewhere, the increase costs to businesses, the potential for staff leaving and the time needed to adapt. Comments regarding expected positive impacts reflected health benefits, stimulating behavioural changes, benefits for both the city and business reputation and the importance of taking action.

Impact on Customers

82.2% of respondents identified that they have customers or visitors who could be affected by the Bristol Clean Air Zone.

Impact on employees

79.3% of respondents identified that their business has employees who could be affected by the Bristol Clean Air Zone.

Impact on business travel

64.6% of businesses have a requirement to move around the city that might be affected by the Bristol Clean Air Zone.

93.6% of respondents need to travel through Bristol in order to get to another part of the city (or wider city-region) for business purposes.

71% of respondents would not be happy to drive their non-compliant commercial vehicle through Bristol and pay the fee for doing so.

71.2% of respondents identified that there is no viable alternative route outside the Clean Air Zone available to them.

The following routes within the Clean Air Zone were identified as key routes for businesses:

Routes	Percentage
M32	83.2%
Hotwells Road / City Centre north of the harbour	67.7%
Plimsoll Bridge / Portway	58.8%
Coronation Road / A370 North of Bedminster / Southville	55.7%
Cumberland Road	55.7%
Park Row / Marlborough Street	52.0%

Commercial vehicles

30.4% of respondents own commercial vehicles.

87% of respondents do not know what the cost of upgrading non-compliant vehicles will be.

Only 12.5% of respondents answered yes to the question ‘do you think your business would be able to afford upgrading its non-compliant vehicle fleet?’

The most popular mitigation measures to help businesses upgrade their fleet are as follows:

1. Grant to improve environmental performance of new vehicle (54.6%)
2. Scrappage scheme for existing non-compliant vehicle (42.4%)
3. Interest free loan for new vehicle (40%)

Common comments in this section reflected concerns regarding costs, the need for phased implementation and for improved public transport.

Desired changes

The changes to the clean air proposals that respondents would like to see that could mitigate the impact on businesses are listed in order of preference:

Potential change	Percentage
Provide support to enable businesses to upgrade their current non-compliant vehicles	52.7%
Allowing Euro 6 private diesel cars to travel in the zone area	52.3%
Remove key travel corridors from the zones to allow non-compliant vehicles to move through the city	50.9%
Extend the timetable for zone implementation to allow greater time for adaptation	47.3%
Enhance public transport provision	44.5%
Provide more parking outside the zone to make it easier to visit the centre	34.5%
Provide more park and ride services into the city	31.4%
Change the zone boundaries to make them smaller	30.9%

Perception of CAZ D

77% of respondents would prefer a CAZ D scheme involving financially penalising the most polluting, but not banning, both petrol and diesel private cars rather than the current proposal for a diesel ban for private cars in the central area of the city.

Relocation

69.2% of respondents identified that either they would not consider moving their business location or business operations outside of the clean air zone in the future, or that relocation is not possible. 19.4% of respondents identified that they would consider such relocation in the future.