



**Sheffield Clean Air Zone Consultation – Businesses
and Organisations**

**A Report
for Sheffield City Council**

February 2020

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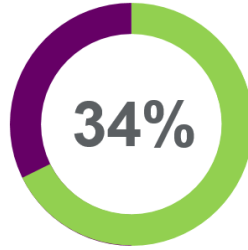
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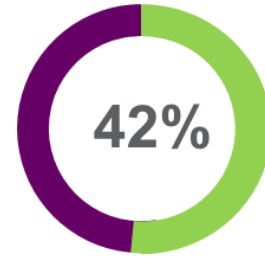
Executive Summary



307 Businesses

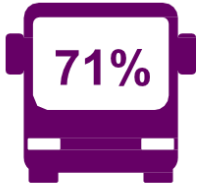


Feel that the CAZ boundary covers the right area



Have sites based inside the CAZ boundary

Which Vehicles Should be Subject to the Charge?



Buses and Coaches



Lorries



Taxis and Private Hire



Private Cars



Vans and Minibuses

Proportion of Business Who Felt that Vehicle Charges are Too High



Vans and Minibuses



Buses and Coaches



Lorries / HGV's



Private Hire Vehicles



Hackney Taxis

Most Common Vehicles Used by Businesses

Own Outright



2.1 per Business



5.5 per Business



2.0 per Business

Loan or Long-Term Lease



2.3 per Business



35.2 per Business



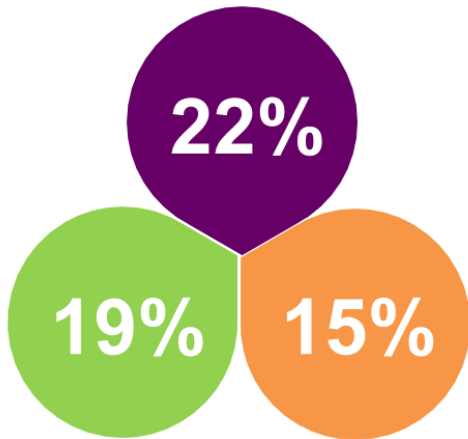
39.0 per Business

Diesel Vans and Minibuses

Diesel Cars

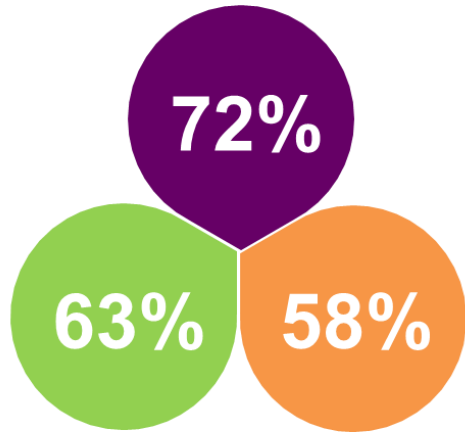
Petrol Cars

Top 3 Most Likely Responses to the CAZ Charge



Look to replace non-compliant vehicle(s)
Increase prices to cover the charge
Just pay the charge

Top 3 Responses: Further Action Sheffield City Council should take



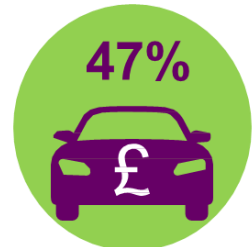
Improve public transport
Take action to reduce congestion
Encourage cycling



53%
Think the CAZ will have a positive impact on the health of people in Sheffield



69%
Think the CAZ will have a negative impact on their business



47%
Support charging private cars if the current CAZ does not improve air quality



Think they will need extra support for upgrading



41%
Would be encouraged to upgrade their vehicle through Grant Funding



86%
Say there should be exemptions for entering the zone due to road works or diversions

1 Background

Context

1.1 In 2015, the UK Government was ordered by the Supreme Court to take action to tackle air pollution where levels of Nitrogen Dioxide (NO₂) breached legal limits. The Department for Environment, Food, and Rural Affairs (DEFRA) identified Sheffield and Rotherham as one of a number of areas where the annual average concentrations of NO₂ exceed statutory limits and are projected to continue to do so for a number of years. The two Councils were therefore tasked with developing a strategy which will help ensure that their Council areas become compliant with this statutory limit in the 'shortest possible time'.

1.2 Detailed modelling work has been undertaken by Sheffield City Council and Rotherham Metropolitan Borough Council to identify the most heavily polluted areas, the sources of that pollution and the measures that will be required to ensure that air pollution is brought within legal limits in the shortest possible time.

1.3 The modelling suggests that a charging CAZ will be required in Sheffield, and a Class C+ CAZ is being proposed in order to meet the air quality requirements across Sheffield and Rotherham. The standards required to avoid the daily charge are outlined below:

Table 1.1: Clean Air Zone C+ Classification

Buses and Coaches	Euro VI
Heavy Goods Vehicles	Euro VI
Large Vans	Euro 6 (Diesel); Euro 4 (Petrol)
Small Vans/Light Commercial	Euro 6 (Diesel); Euro 4 (Petrol)
Minibuses	Euro 6 (Diesel); Euro 4 (Petrol)
<i>Taxi and Private Hire Vehicles</i>	<i>ULEV/LPG or Hybrid (Petrol)</i>

Source: Sheffield and Rotherham Clean Air Zone Feasibility Study OBC, 2018.

1.4 The local proposal includes taxi and private hire vehicles to have a minimum requirement of a ULEV (Ultra Low Emission Vehicle), LPG (Liquid Petroleum Gas) or a petrol hybrid vehicle to avoid the daily charge. This is a step beyond the standard Class C requirement in the Government's Clean Air Zone Framework. In Rotherham, a charging zone is not required for the Borough to achieve compliance.

1.5 Analysis indicates that whilst approximately 81% of vehicles on the roads of Sheffield are private vehicles, they contribute only 50% of the total NO₂ emissions. Buses, other goods vehicles, light goods vehicles and taxis all account for a higher proportion of NO₂ emissions than their share of vehicle traffic Sheffield. A Class C+ CAZ has therefore been proposed in order to target the biggest polluters:

Table 1.2: Fleet Specific Impact Model for Vehicles

Vehicle Type	Percent of Fleet (F)	Percent of NO ₂ (N)	Fleet Specific Impact (N/F)	
Buses	1%	5%	5.0	Most Polluting
Other Goods Vehicles (>3.5 tonnes)	3%	15%	5.0	Most Polluting
Light Goods Vehicle (<3.5 tonnes)	13%	26%	2.0	High Polluting
Taxis (Hackney and Private Hire)	3%	4%	1.3	High Polluting
Private Cars	81%	50%	0.6	Least Polluting

Source: Sheffield City Council, 2019. Responses to Taxi Driver Questions

1.6 The proposed CAZ area will cover Sheffield city centre from the inner ring road inwards. The boundary (figure 1.1) will include Hanover Way and Netherthorpe Road, West Bar, Derek Dooley Way to the Parkway and along Sheaf Street, past Sheffield Train Station and St. Mary's Gate.

Figure 1.1: The Proposed Sheffield Clean Air Zone Boundary



1.7 The proposed daily charges for each non-compliant vehicle entering the CAZ are as follows:

- Taxis and private hire vehicles: £10
- Vans / Light Commercial: £10
- Buses and Coaches: £50
- Heavy Goods Vehicles: £50

1.8 Sheffield City Council has undertaken a formal consultation on the proposed Clean Air Zone, its coverage and the proposed charges. This report provides an overview of the responses to the consultation provided by businesses and organisations.

Clean Air Zone Consultation Methodology

1.9 Sheffield City Council produced three different online questionnaires, targeted at different stakeholders who would be effected by the introduction of the CAZ: citizens, taxi drivers and businesses / organisations. Data was collected via online surveys, with a number of consultation events and meetings being held with those likely to be affected.

1.10 The consultation was publicised through social media, local news organisations, the Council's website and through on-street signage around the city. The consultation ran from 1st July to 26th August 2019.

Sample and Representativeness

1.11 The target population for the business questionnaire was businesses and organisations operating in Sheffield and the surrounding area who might be affected by the CAZ. Overall, responses to the online questionnaire were received from 307 businesses and organisations¹.

1.12 Because the population profile for the target population is not known (whilst data is available for the sector and type of businesses in Sheffield, this does not provide a population profile, because the consultation was open to businesses based outside the city), it has not been possible to apply weighting or calculate the representativeness of the sample. Where possible a comparison has been made to the business population of Sheffield, but as a self-selecting, non-probability sampling method was used, statistical significance testing is not appropriate.

Analysis and Reporting

1.13 Analysis of each question is based on the number of businesses / organisations responding to that specific question. The sample size for each question is therefore indicated on each of the tables / charts in this report. For questions which included multiple variables, the sample size for the specific variable has also been identified.

1.14 The data is included in the charts and tables as percentages, provided to one decimal place. Where percentages not sum to 100%, this is either due to multiple responses being allowed, or due to rounding.

Profile of Respondents

1.15 Responses to the online questionnaire were received from 307 business organisations. Just over three-quarters of respondents gave a Sheffield postcode for the main site of their business (235 businesses, 76.5% of the total). Other businesses who responded were based in: Derbyshire; Nottinghamshire; Barnsley; Lincolnshire; Doncaster; Leeds; Lancashire and Watford.

Sector

1.16 Businesses were asked which sector they were part of and asked to select from a pre-defined list, or select 'other' and state the nature of their business. The highest number of responses (52) was received from businesses in the construction sector, which accounted for 16.9% of respondents. This is an over-representation compared to the share of construction businesses within Sheffield's business base (12.4%), and probably reflects the interest of this sector in the consultation, given the

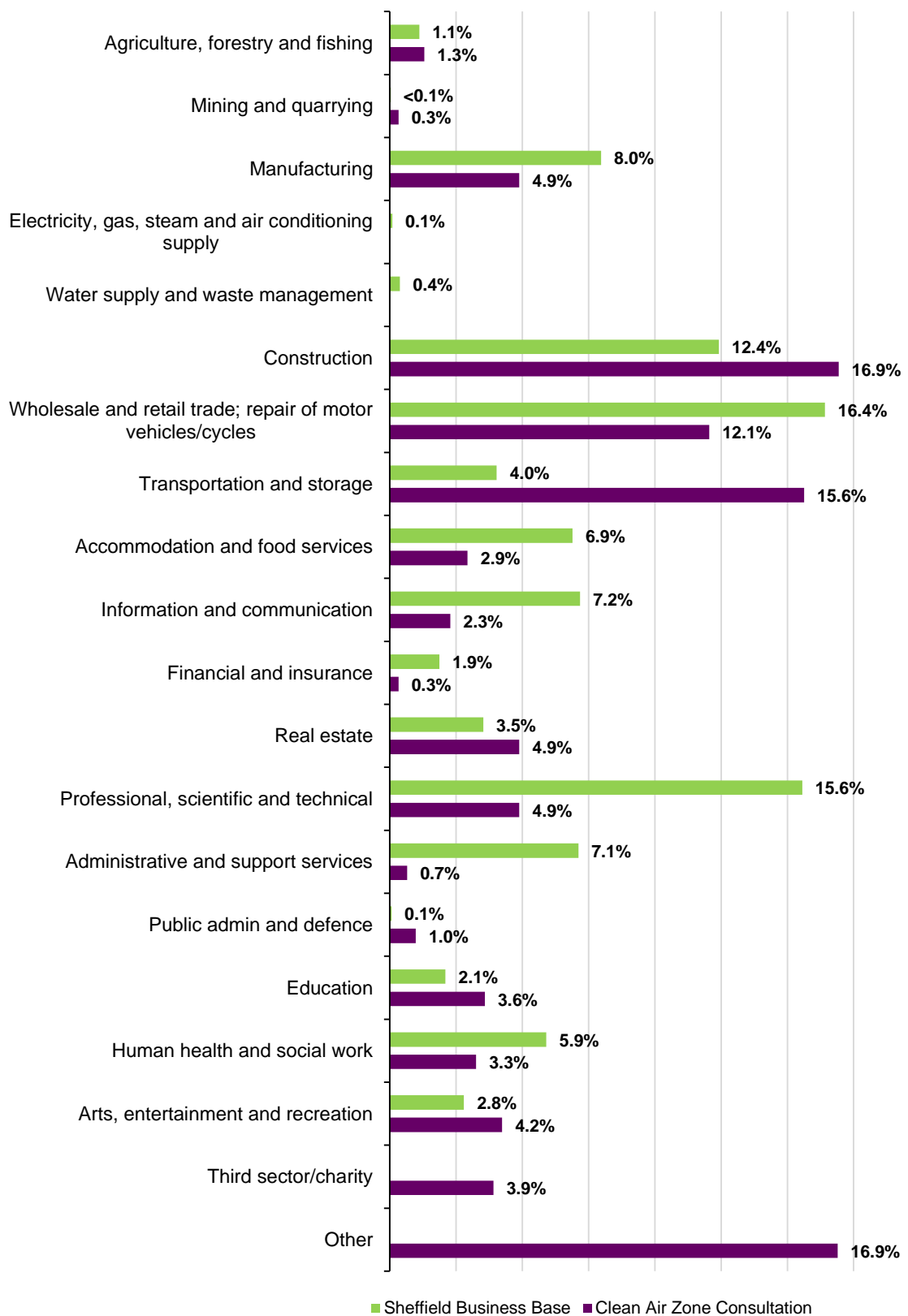
¹ A further 16 businesses and organisations submitted written responses. These have been analysed and the results are summarised in Appendix 2.

heavy use of vans made by construction sector businesses. Businesses classing themselves as 'other' also accounted for 16.9% of respondents.

1.17 The third highest number of responses came from businesses in the transport and storage sector (15.6%, 48, compared to 4.0% of the Sheffield business base). This again reflects the extent to which businesses in this sector are likely to be affected by the Clean Air Zone.

1.18 In a number of sectors, the proportion of responses to the Clean Air Zone consultation is considerably lower than their overall share of the business base, including professional, scientific and technical (4.9% of responses compared to 15.6% of the business base), administrative and support services (0.7% compared to 7.1%), accommodation and food services (2.9% compared to 6.9%) and the information and communication sector (2.3% compared to 7.2%).

Figure 1.2: "What sector does your organisation fall into?"

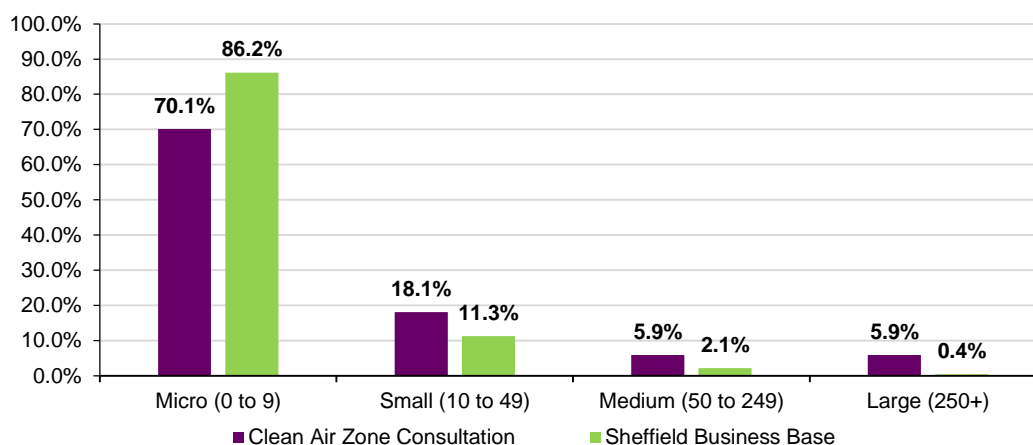


Source: Clean Air Zone Consultation 2019 (n = 307 responses); UK Business Counts

Business Size

1.19 Just over 70% (213) of those responding to the consultation were microbusinesses, employing under ten people. This compares to 86.2% of the Sheffield business base. In contrast, over 10 per cent of responses to the consultation (11.8%, 36) were from businesses employing over 50 people, which account for only 2.5% of the Sheffield business base.

Figure 1.3: "How many employees does your organisation have in Sheffield?"



Source: Clean Air Zone Consultation 2019 (n = 304 responses); UK Business Counts

Respondent Role

1.20 Respondents were asked about their role within the business. Over one-third were directors (111 respondents, 36.8% of the total), nearly 10% (30) were managers, and just under one quarter said they were sole traders, with no employees (73, 24.2%)².

Business Location

1.21 Responses were received from businesses across the city (as well as 72 based outside Sheffield). The highest number of respondents were based in the city centre (27.7%, 65) with significant numbers also located in Hillsborough (9.8%, 23), Darnall (7.2%, 17) and Nether Edge and Sharrow (6.0%, 14)³.

² See appendix 4.1 for respondent breakdown.

³ See appendix 4.3 for respondent breakdown.

Figure 1.4: Business Respondents by Ward

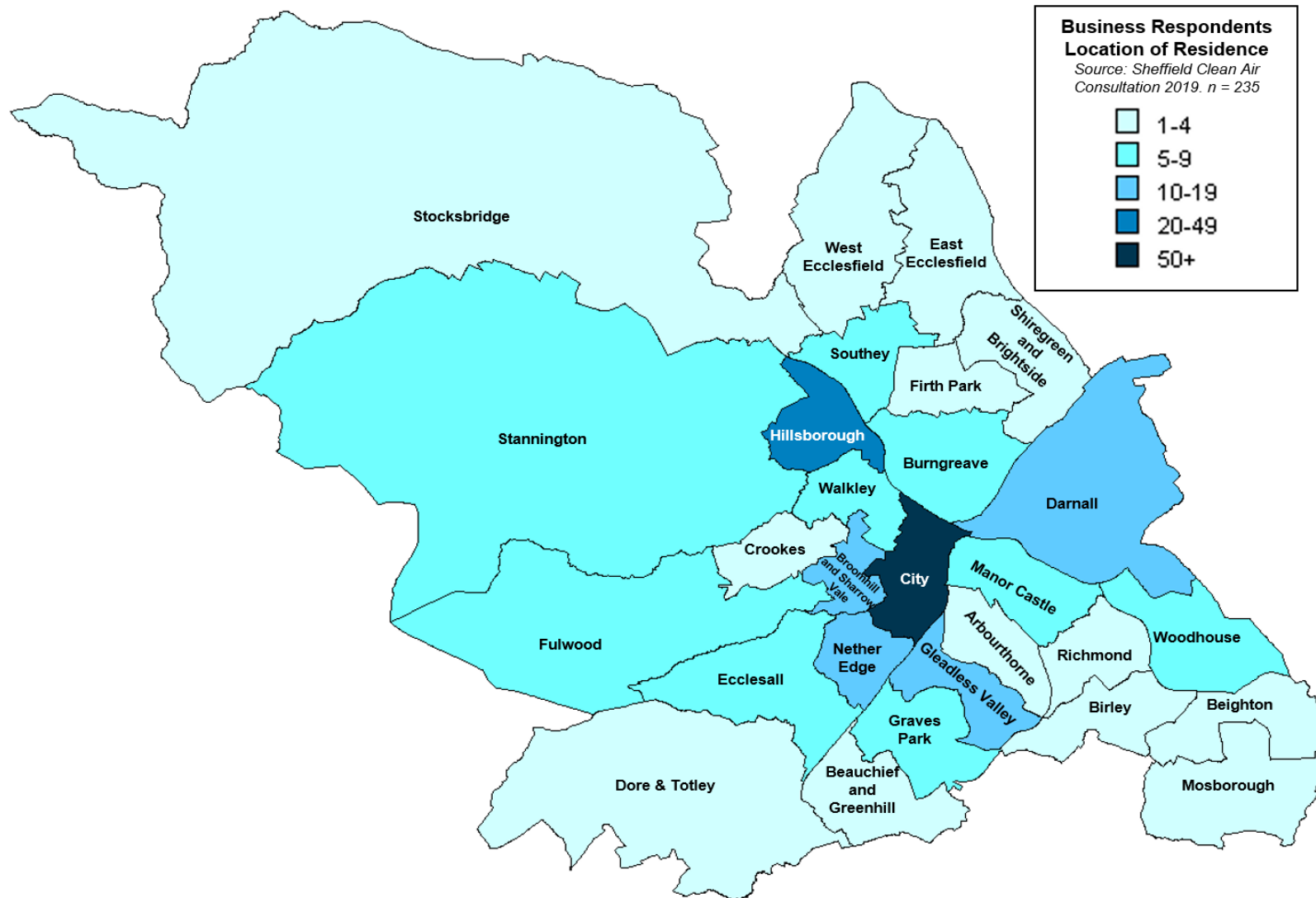
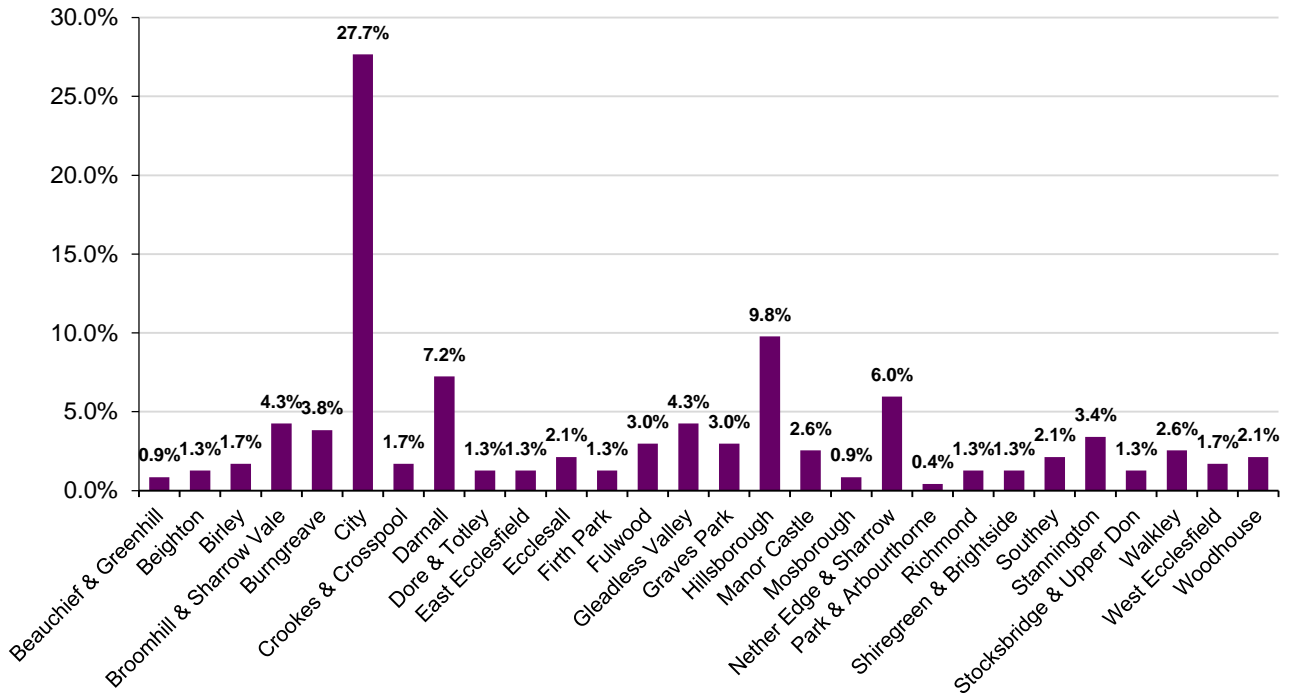


Figure 1.5: Business Respondents: Proportion of Businesses (%) by Ward



Source: Clean Air Zone Consultation 2019 (n = 235 responses)

2 The Proposed Clean Air Zone in Sheffield

Key Points:

- Overall, more businesses disagreed that the CAZ covers the right area (48.7% of respondents, including 31.8% who disagreed strongly) than agreed (34.1% of respondents, including 7.6% who agreed strongly).
- Microbusinesses (employing fewer than ten employees) were more likely to feel that the CAZ did not cover the right area, with 51.7% disagreeing, including 35.5% who disagreed strongly with the area proposed.
- Businesses in the construction, transport and 'other' sectors were more likely to disagree, and disagree strongly, with the proposed CAZ area than businesses as a whole.
- The most common criticism of the proposed area amongst these respondents was the inclusion of the inner ring road, with respondents highlighting the difficulty of avoiding using the ring road when driving across the city.
- Other businesses were concerned about the potential for the CAZ to encourage drivers into residential areas and spread the pollution / congestion problem to more areas; the potential detrimental effect on city centre as people and businesses will avoid it to avoid charges; the daily cost on business; and that alternatives to the CAZ should be considered.
- The most common type of trip reported by respondents was deliveries to customers or service users based in the proposed CAZ area. Nearly 90% of respondents (87.9%, or 270 businesses) said that they deliver to customers within the CAZ, although for 23.0% of these, this amounted to less than one trip per week on average.
- Businesses were asked which types of vehicles they thought should be included in the CAZ restrictions. The strongest support was for the inclusion of buses and coaches followed by lorries; and taxis and private hire vehicles.

Introduction

2.1 Business were asked about their overall views on the proposed Clean Air Zone (CAZ). This included their perceptions on the size of the boundary including the ring road and their current use of the Sheffield City Centre to see if and how often they would be affected by the charge. This section also includes business views on the types of vehicle that are going to be charged under the policy.

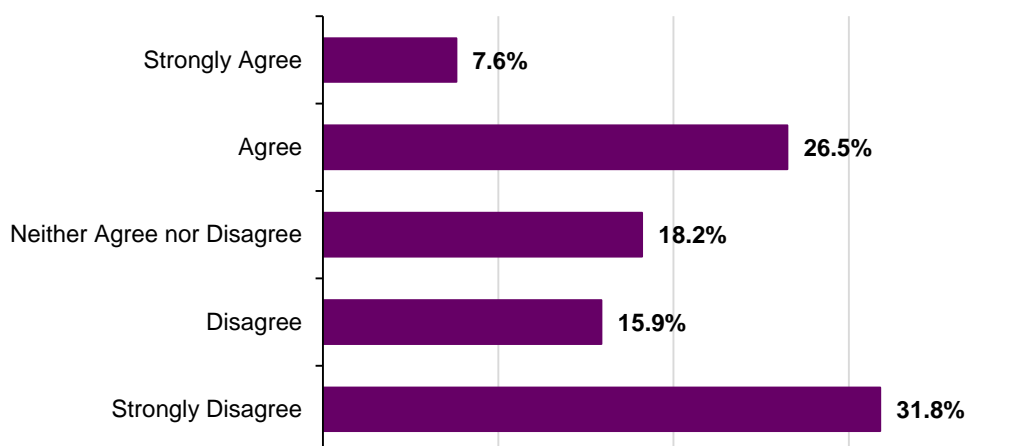
Proposed Coverage of the CAZ

2.2 Businesses were asked whether they agreed or disagreed that the proposed CAZ covers the right area. Overall, more businesses disagreed that the CAZ covers the right area (48.7% of respondents, including 31.8% who disagreed strongly) than agreed (34.1% of respondents, including 7.6% who agreed strongly)⁴. Microbusinesses (employing fewer than ten employees) were more likely to feel that the CAZ did not cover the right area, with 51.7% disagreeing, including 35.5% who disagreed strongly with the area proposed, compared to 40.0% of small businesses employing between ten and 49 people (23.6% strongly disagreeing) and 28.6% of medium and large businesses (including 22.2% who disagreed strongly).

2.3 Businesses in the construction, transport and 'other' sectors were more likely to disagree, and disagree strongly, with the proposed CAZ area than businesses as a whole. Sixty-six per cent of 'other' sector businesses, 58.8% of construction businesses and 55.3% of transport businesses disagreed with the proposed coverage.

⁴ See appendix 4.6 for respondent breakdown.

Figure 2.1: "Do you agree or disagree that the proposed Clean Air Zone covers the right area?"



Source: Clean Air Zone Consultation 2019 (n = 302 responses)

2.4 One hundred and sixty-six businesses provided comments on the proposed extent of the CAZ. Of these, 27 (8.8% of all respondents) thought that the CAZ should cover a smaller area. The most common criticism of the proposed area amongst these respondents was the inclusion of the inner ring road, with respondents highlighting the difficulty of avoiding using the ring road when driving across the city. Thirty-nine respondents suggested that the CAZ should cover a larger area. Areas commonly mentioned by those thinking that the CAZ should be extended included Broomhill, the hospitals and University; areas around the M1 including Catcliffe, Tinsley and Meadowhall; the major arterial roads into the city; and a number saying that more schools should be covered.

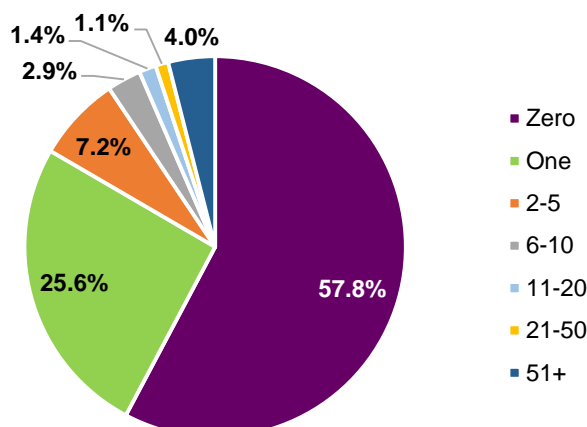
2.5 The 100 other businesses who provided a comment in response to this question did not directly address the proposed CAZ area, but made more general points. Many (33) were concerned about the potential for the CAZ to encourage drivers into residential areas and spread the pollution / congestion problem to more areas, 17 were concerned that the proposal will have detrimental effect on city centre as people and businesses will avoid it to avoid charges, 15 were concerned about the daily cost on business and 14 thought that alternatives to the CAZ should be considered.

Sites Within and Outside the CAZ

2.6 The majority of businesses responding to the consultation operate from at least one site within Sheffield, although only 117 have a site which is located within the proposed CAZ. For 71 respondents, the site within the CAZ area is their only site⁵.

⁵ See appendix 4.7, 4.8 and 4.9 for respondent breakdown.

Figure 2.2: "How many sites does your organisation have in the proposed Clean Air Zone area?"

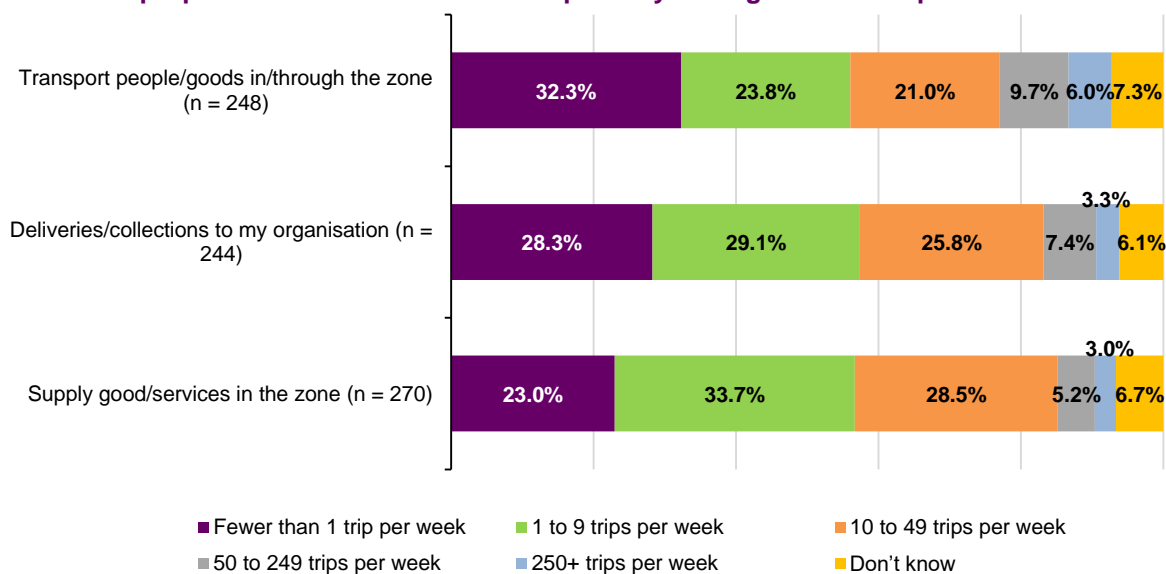


Source: Clean Air Zone Consultation 2019 (n = 277 responses)

Vehicle Trips within the CAZ

2.7 Business respondents reported numerous vehicle trips in and across the CAZ each week as part of their operations. The most common type of trip reported by respondents was deliveries to customers or service users based in the proposed CAZ area. Nearly 90% of respondents (87.9%, or 270 businesses) said that they supply goods/services to customers within the CAZ, although for 23.0% of these, this amounted to fewer than one trip per week on average. Just over 80% said they transport people or goods through the proposed CAZ (80.8%, 248 businesses), with one-third saying that this happened less than once a week on average. Just under 80% (79.5%, 244 businesses) said that they receive deliveries or collections within the CAZ, although for 28.3% of these, this amounted to fewer than one trip per week⁶.

Figure 2.3: "Roughly how many vehicle trips per week are made in the proposed Clean Air Zone area as part of your organisations operation?"



Source: Clean Air Zone Consultation 2019

⁶ See appendix 4.10 for respondent breakdown.

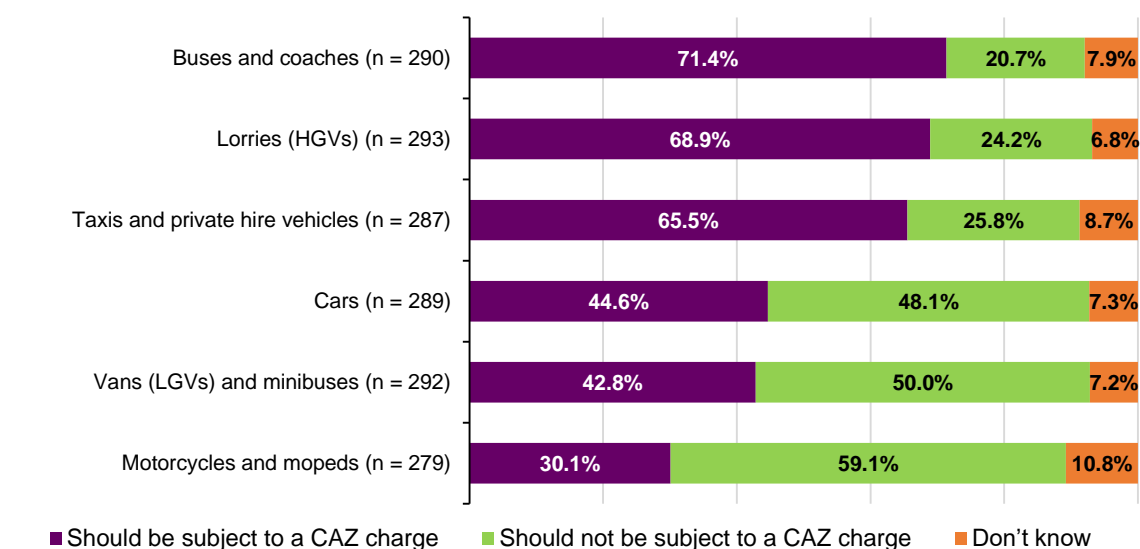
Business Views of Vehicles which should be included in the CAZ restrictions

2.8 Businesses were asked which types of vehicles they thought should be included in the Clean Air Zone restrictions. The strongest support was for the inclusion of buses and coaches (71.4%), followed by lorries (68.9%), and taxis and private hire vehicles (65.5%)⁷.

2.9 Overall, larger businesses are more likely to think that buses and coaches, lorries, taxis and private hire vehicles, and vans and minibuses should be included in the CAZ restrictions than smaller businesses. However, the opposite is true for cars. Just under half of microbusinesses, small and medium-sized businesses who responded to the consultation felt that cars should be included in the restrictions, compared to only one third of larger businesses.

2.10 Overall, firms in the transport sector were less likely to think that all types of vehicles should be included in the CAZ restrictions than businesses overall. Construction businesses were roughly in line with the overall average except in relation to vans and minibuses, with only 25.0% of construction firms thinking that vans should be included in the restrictions.

Figure 2.4: "Which types of vehicle do you think should be included in the Clean Air Zone restrictions?"



Source: Clean Air Zone Consultation 2019

⁷ See appendix 4.11 for respondent breakdown.

3 Business Fleet and Use of Vehicles

Key Points:

- Over 90% of respondents said they used vehicles in the city (92.0%, 277 businesses), with the vehicle most commonly used by respondents to the consultation being a diesel van / minibus.
- The vast majority of business respondents who use vehicles (84.7%) said that at least some of their current fleet would be charged to drive in the proposed CAZ, with nearly half of businesses saying that all of their current fleet would be charged to drive in the Zone.
- More than half of respondents said that they upgrade or replace their vehicles at least every six years, with more than one-fifth upgrading more frequently than every four years. However, there are a significant number of businesses who upgrade or replace their vehicles much less frequently.

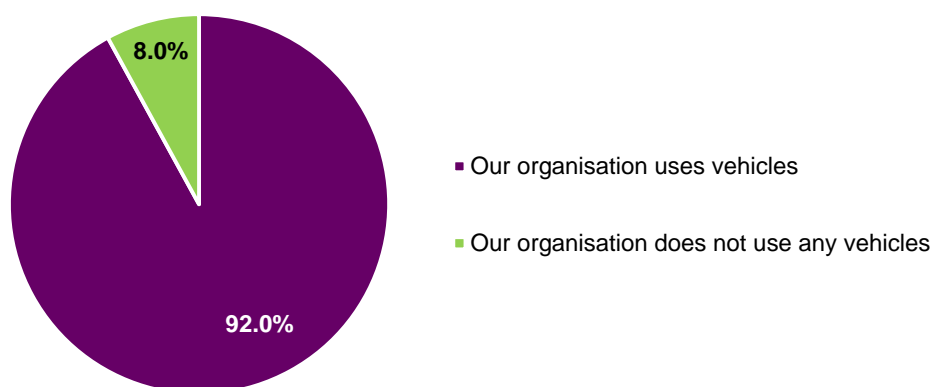
Introduction

3.1 The section details business use of the Clean Air Zone (CAZ), including the size of their vehicle fleet and what proportion will be affected by the charge. In addition, the section shows the upgrade frequency of company vehicles, to highlight how long business will be affected by the CAZ charge with any current non-compliant vehicles.

Business Use of Vehicles

3.2 Over 90% of respondents said they used vehicles in the city (92.0%, 277 businesses)⁸.

Figure 3.1: "Does your organisation use vehicles in Sheffield?"



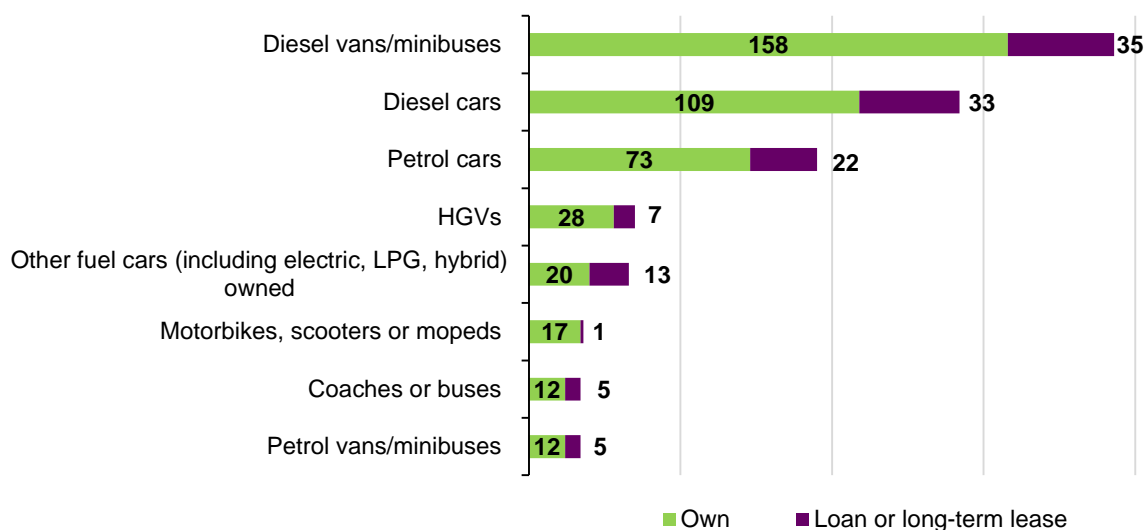
Source: Clean Air Zone Consultation 2019 (n = 301 responses)

3.3 The vehicle most commonly used by respondents to the consultation is a diesel van / minibus, with 158 businesses saying that they owned at least one such vehicle (the average number owned per business was 2.1) and 35 saying they had diesel vans on loan or long-term lease (2.3 per business on average). The next most commonly-used vehicle was a diesel car, with 109 businesses owning on average 5.5 diesel cars, and 33 businesses leasing on average 35.2 diesel cars. This indicates the importance of diesel vehicles to the business community in Sheffield⁹.

⁸ See appendix 4.12 for respondent breakdown.

⁹ See appendix 4.13 for respondent breakdown.

Figure 3.2: "Thinking about the vehicles which you own or have on long term lease in Sheffield, which of the following do you own / lease?"

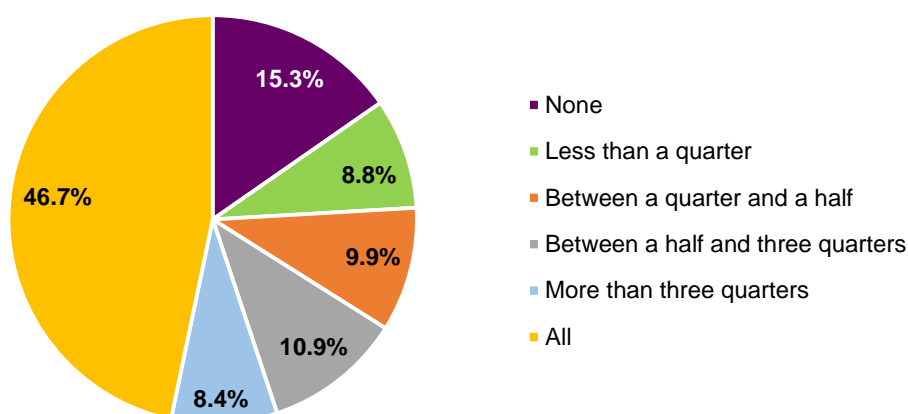


Source: Clean Air Zone Consultation 2019 (n = 277 responses)
 Totals do not sum due to multiple responses

Vehicles Affected by the CAZ

3.4 Given the nature of the vehicles owned / leased, the vast majority of business respondents who use vehicles (84.7%) said that at least some of their current fleet would be charged to drive in the proposed Clean Air Zone. Nearly half of businesses (46.7%) said that all of their current fleet would be charged to drive in the Zone. This response was much more common amongst microbusinesses, with 57.2% of those responding saying that their entire fleet (which might in this case be only one vehicle) would be charged to drive in the CAZ. In contrast, only around one in five other businesses (employing 10 people or more) said that all of their fleet would be affected¹⁰.

Figure 3.3: "Roughly what proportion of your current fleet would be charged to drive in the proposed Clean Air Zone?"



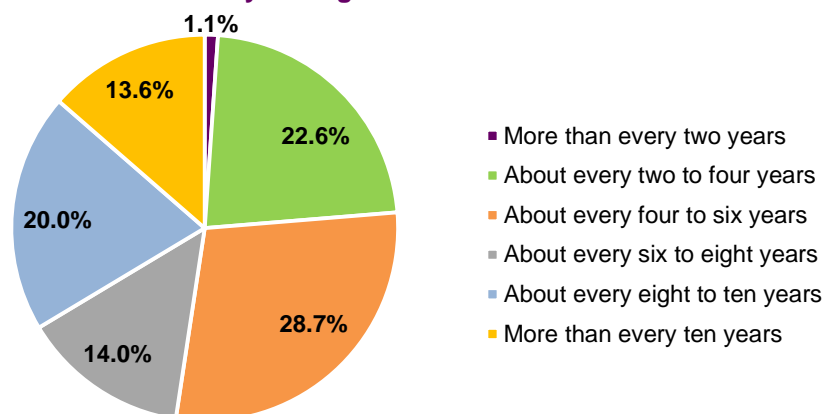
Source: Clean Air Zone Consultation 2019 (n = 274 responses)

¹⁰ See appendix 4.14 for respondent breakdown.

Frequency of Fleet Upgrades

3.5 More than half of respondents said that they upgrade or replace their vehicles at least every six years, with more than one-fifth upgrading more frequently than every four years. However, there are a significant number of businesses who upgrade or replace their vehicles much less frequently, with 13.6% saying that they upgrade their vehicles less than every ten years, many of which are microbusinesses¹¹.

Figure 3.4: "In general, how often do you usually upgrade or replace vehicles your organisation uses?"



Source: Clean Air Zone Consultation 2019 (n = 265 responses)

¹¹ See appendix 4.15 for respondent breakdown.

4 Proposed Charges and Exemptions

Key Points:

- Business respondents were most likely to think that the proposed charges for vans and minibuses were too high, followed by buses and coaches; and lorries.
- Construction sector businesses were particularly likely to feel that the proposed charges for vans and minibuses were too high (40 out of 52 respondents), whilst transport sector businesses were likely to feel that the proposed charges for buses and coaches were too high (35 out of 48 respondents).
- The highest level of agreement was with an exemption for vehicles entering the CAZ due to road diversions, with 85.6% in favour of this exemption compared to 11.4% who disagreed. There was also an overall majority in favour of exemptions where no compliant vehicle is on the market, with 60.8% agreeing with this, compared to 18.2% disagreeing.
- Business respondents were not in favour of exemptions for school buses (43.7% in favour compared to 48.8% against – although nearly half of microbusinesses felt that school buses should be exempt).

Introduction

4.1 The proposed Clean Air Zone (CAZ) will feature a daily charge for non-compliant vehicles under the Class C Classification of CAZ's. Businesses were asked for their views on the proposed charges for the various vehicle types, in addition to which types of exemptions should be allowed in order to avoid unnecessary or unfair charges.

Views on Proposed Charges by Vehicle Type

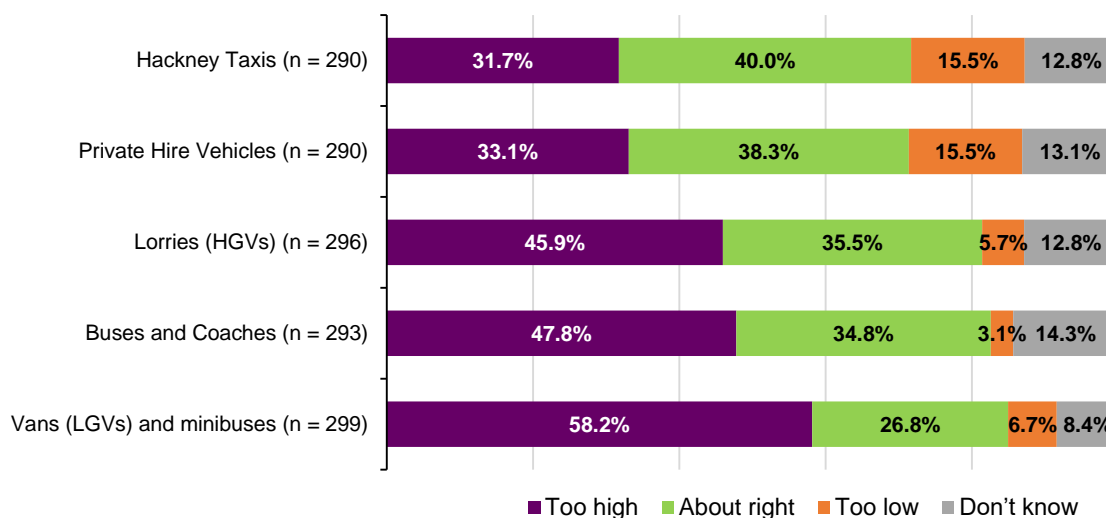
4.2 Businesses were asked about the proposed charges for each type of non-compliant vehicle. The proportion thinking that the proposed charges were about right ranged from 40.0% for hackney taxis, to 26.8% for vans and minibuses¹².

4.3 Business respondents were most likely to think that the proposed charges for vans and minibuses were too high (58.2% thought too high, 6.7% thought too low), followed by buses and coaches (47.8% thought too high, 3.1% said too low), and lorries (45.9% thinking the proposed charge was too high, 5.7% saying it was too low). Smaller businesses were more likely to think that the proposed charges (for all types of vehicle) were too high than larger businesses.

4.4 Construction sector businesses were particularly likely to feel that the proposed charges for vans and minibuses were too high (40 out of 52 respondents), whilst transport sector businesses were likely to feel that the proposed charges for buses and coaches were too high (35 out of 48 respondents).

¹² See appendix 4.16 for respondent breakdown.

Figure 4.1: "What do you think about the proposed level of charge for different non-compliant vehicles?"



Source: Clean Air Zone Consultation 2019

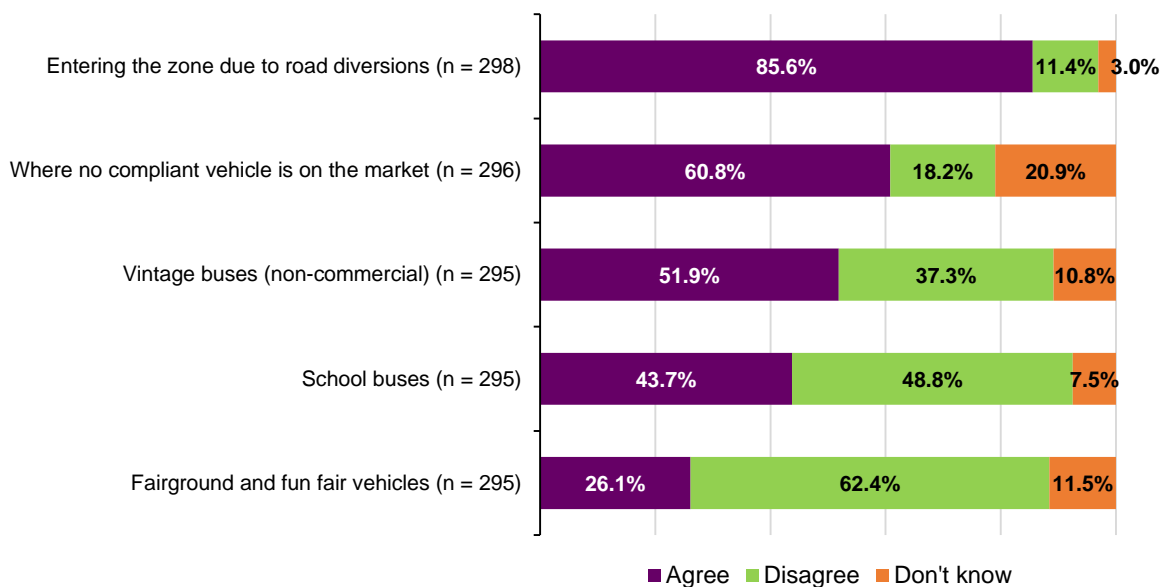
Views on Exemptions

4.5 Businesses were also asked whether they agreed with proposed exemptions for a range of different vehicle types and circumstances. The highest level of agreement was with an exemption for vehicles entering the CAZ due to road diversions, with 85.6% in favour of this exemption compared to 11.4% who disagreed. There was also an overall majority in favour of exemptions where no compliant vehicle is on the market, with 60.8% agreeing with this compared to 18.2% disagreeing. Larger businesses were more likely to agree with this exemption than microbusinesses. There was also a small majority in favour of vintage buses (non-commercial) being exempt, with 51.9% being in favour and 37.3% against¹³.

4.6 Business respondents were not in favour of exemptions for school buses (43.7% in favour compared to 48.8% against) although nearly half of microbusinesses felt that school buses should be exempt) or for fairground and fun fair vehicles (26.1% in favour, 62.4% against), with larger businesses much less likely to be in favour of an exemption for fairground vehicles.

¹³ See appendix 4.17 for respondent breakdown.

Figure 4.2: "Do you agree or disagree that the following vehicles or circumstances should be exempted at this stage?"



Source: Clean Air Zone Consultation 2019

4.7 One hundred and thirty-eight businesses provided a comment on the proposed charges. Of these, 79 said they were too high, five said they were about right and one said they were too low. The other comments covered a range of topics. These included commentary on the types of vehicles which would be charged, suggesting that private cars or all non-compliant vehicles should be charged, in addition to some suggesting a range of other vehicles which should be exempt, including removal vehicles; adapted minibuses; vehicles owned by businesses based in the CAZ or based on an organisation's contribution to the local economy; and those owned by low income individuals who need to enter the CAZ for work or training.

4.8 There was also respondents who suggested alternative approaches to improving air quality other than the CAZ, such as improving public transport and supporting active travel, tackling idling and other sources of air pollution (including trains), improving the electric vehicle charging infrastructure and improving the traffic flow. Finally, some respondents suggested ways to mitigate the impact of the CAZ on businesses, including subsidies to support vehicle upgrades, offering a monthly pass or discount and giving businesses longer to adapt to the change.

5 Overall Impact of the Clean Air Zone

Key Points:

- Overall, businesses felt that the introduction of a CAZ would have a positive impact on the health of people in Sheffield, with 52.5% feeling it would have a positive or very positive impact.
- Businesses were less positive about the overall impact for the city, with 39.7% feeling the overall impact would be positive.
- Businesses overwhelmingly felt that the introduction of a CAZ would have a negative impact on their business as well as business as a whole in the city.
- The three main responses to how the CAZ would affect businesses can be grouped by bearing the cost of the charge; passing the costs onto customers; and stop serving customers in the zone and / or close the business.
- Just under 60% of businesses said they would be likely to look to replace non-compliant vehicles with compliant ones, which would help to achieve the objectives of the CAZ. However, nearly as many said they would just pay the charge, which would not have the desired effect on air pollution levels.
- A number of the potential responses could have a negative impact on the Sheffield economy, including increasing prices (identified by 40.4%), relocating the businesses outside the CAZ (33.9%) and ceasing trading (22.6%). Microbusinesses and businesses in the transport sector were most likely to say that they might cease trading as a result of the charges.
- Just over one-fifth said they would buy any new vehicle outright, whilst 19.1% said they would use a lease agreement, 16.4% said they would use bank finance and 14.5% said they would use hire purchase.
- The strongest support was for SMEs operating in the CAZ, with 91.3% of business respondents saying they should be supported, whilst just 2.7% thought they should not.
- Nearly 70% of business respondents said their organisation would need extra support if a CAZ was introduced.
- The support which was considered to be most beneficial, with over half of businesses (53.6%) saying that it would help them to upgrade to a great or moderate extent, was the provision of grants towards upgrading to electric vans.

Introduction

5.1 As outlined in previous sections, it is clear that the proposed Clean Air Zone (CAZ) will have a significant impact on businesses operating in Sheffield and within the zone itself. This section details business views on how the CAZ would affect business operations; how they will respond to any charges; how they would finance a vehicle upgrade; and levels of support required to upgrade.

Overall Impact

5.2 Overall, businesses felt that the introduction of a CAZ would have a positive impact on the health of people in Sheffield, with 52.5% feeling it would have a positive or very positive impact, 36.5% thinking it would have no impact¹⁴.

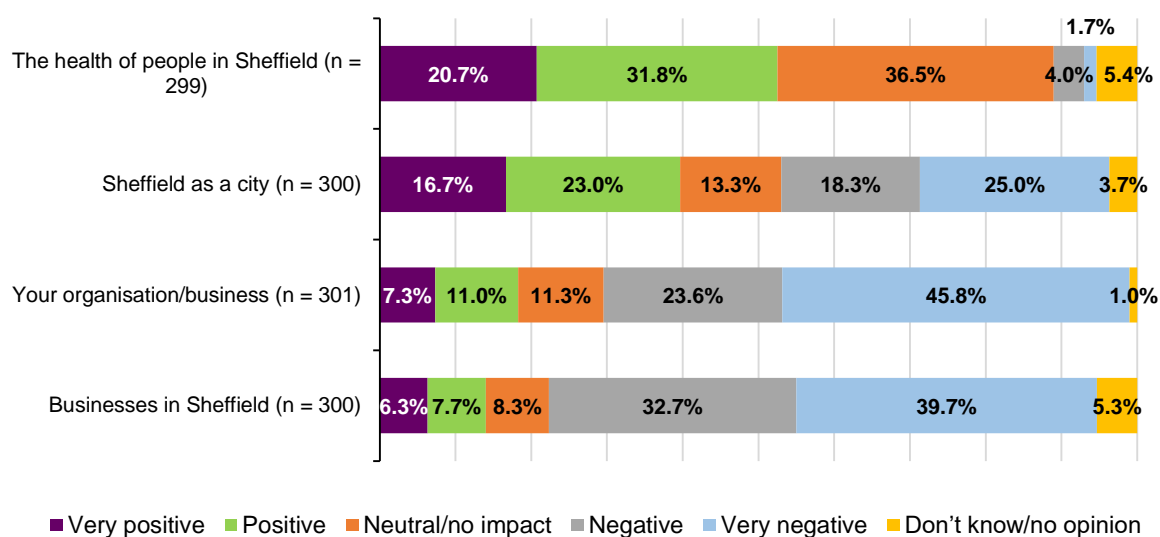
5.3 Businesses were less positive about the overall impact for the city, with 39.7% feeling the overall impact would be positive, compared to 43.3% feeling the overall impact would be negative.

¹⁴ See appendix 4.18 for respondent breakdown.

5.4 Businesses overwhelmingly felt that the introduction of a Clean Air Zone would have a negative impact on their business (18.3% thinking the impact would be positive compared to 69.4% thinking it would be negative). They also felt that the impact on businesses as a whole in the city would be negative, with 14.0% thinking the impact on businesses would be positive and 72.4% saying the impact would be negative.

5.5 Respondents from the construction (67.3%; 35 out of 52 respondents) and transport businesses (75.0%; 36 out of 48 respondents) were most likely to feel that the CAZ would have a very negative impact on their business.

Figure 5.1: "If a Clean Air Zone was introduced what do you think would be the overall impact for the following?"



Source: Clean Air Zone Consultation 2019

5.6 Responses by business size¹⁵ show that just over seven out of ten of SME respondents felt that the CAZ would have a negative or very negative impact on all businesses in Sheffield (72.8%). Large businesses also commonly felt that the CAZ would have a negative impact on businesses in Sheffield, although the proportion of large business respondents providing this response was lower than amongst SMEs (62.5% negative or very negative; 10 out of 16 responses).

5.7 When considering impacts specifically on their own business, just over seven out of ten SME respondents felt that the CAZ would have a negative or very negative impact (71.5%). Microbusinesses were most likely to view the CAZ as having a very negative impact on their business, with more than half providing this response (50.9%) compared to 50.0% of medium-sized businesses and 29.1% of small businesses. In contrast, fewer than a one-third (31.3%; five out of 16 responses) of large businesses felt that the CAZ would be negative or very negative for their business.

¹⁵ See appendix 4.19 for respondent breakdown.

How the CAZ Might Affect Your Organisation

5.8 Nearly 200 businesses provided details on how the CAZ might affect their organisation. These can be grouped into three main categories:

- Just over one-quarter of businesses indicated that they would have to bear the cost of the CAZ charges, as it would not be possible to pass them onto customers.
- Just under one-quarter said that the CAZ would lead to increased costs for customers.
- Just under one-quarter said they would have to stop serving customers within the CAZ and / or close the business.

5.9 A wide range of other impacts were highlighted, including improvements in staff health and reductions in congestion, potential risks to employment levels, and changes to the travel routes used by businesses and their employees to avoid the CAZ.

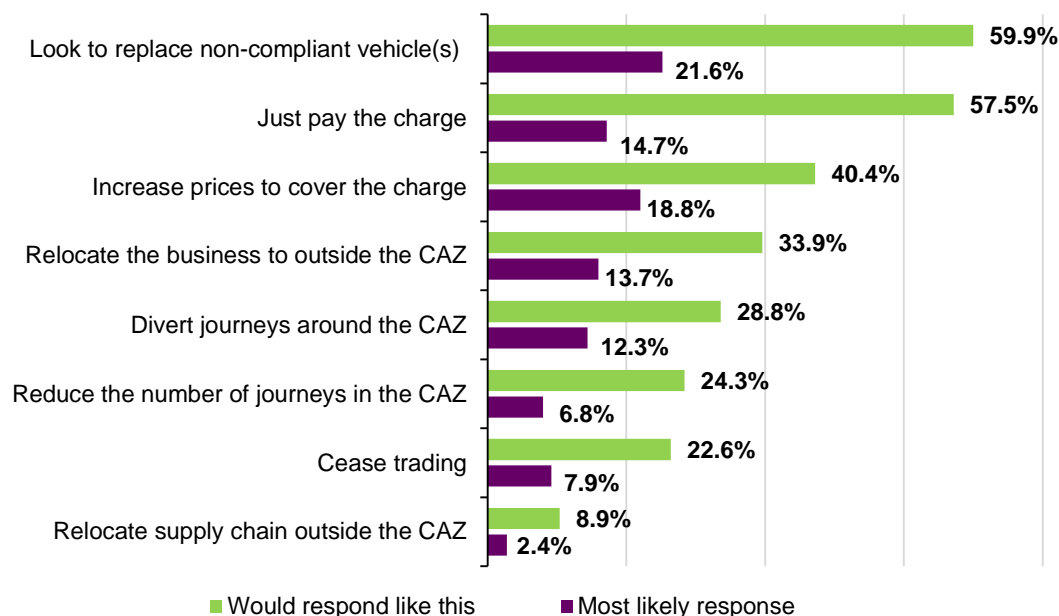
How Your Business is Likely to Respond to CAZ Charges

5.10 Businesses were asked how they would be likely to respond if the proposed charges were introduced, and given the opportunity to rank their top three responses. The chart below shows the percentage of respondents who said they would be likely to respond in each way, and the percentage who identified each response as their most likely¹⁶.

5.11 Just under 60% of businesses said they would be likely to look to replace non-compliant vehicles with compliant ones, which would help to achieve the objectives of the CAZ. However, nearly as many said they would just pay the charge, which would not have the desired effect on air pollution levels.

5.12 A number of the potential responses could have a negative impact on the Sheffield economy, including increasing prices (identified by 40.4%), relocating the businesses outside the CAZ (33.9%) and ceasing trading (22.6%). Microbusinesses and businesses in the transport sector were most likely to say that they might cease trading as a result of the charges.

¹⁶ See appendix 4.20 for respondent breakdown.

Figure 5.2: "If the charges are introduced, how are you likely to respond?"

Source: Clean Air Zone Consultation 2019 (n = 292 responses)

Financing Vehicle Upgrades

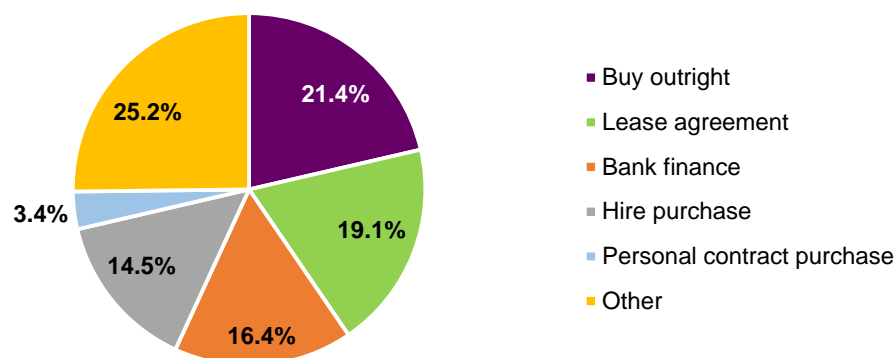
5.13 Businesses were asked about how they would finance upgrading their vehicle(s) from non-compliant to compliant ones. Just over one-fifth said they would buy any new vehicle outright, whilst 19.1% said they would use a lease agreement, 16.4% said they would use bank finance and 14.5% said they would use hire purchase¹⁷.

5.14 With the exception of other finance types, microbusinesses were most likely to say that they would buy their business vehicle outright (21.4%), with lease agreement (19.1%) and bank finance (16.4%). Conversely, only one in 20 small businesses said that they would buy a business vehicle outright, with just less than one-third (32.7%) saying they would use a lease agreement.

5.15 One-quarter (13 out of 52 respondents) of construction businesses stated that they would finance their vehicle(s) with bank finance, followed by a hire purchase agreement or outright purchase (both 17.3%; nine out of 52 respondents).

¹⁷ See appendix 4.21 for respondent breakdown.

Figure 5.3 "If you were to upgrade your business vehicle(s) from non-compliant to compliant one(s), how are you most likely to finance this?"



Source: Clean Air Zone Consultation 2019 (n = 262 responses)

5.16 There were 66 responses given to the 'other' source of financing open question, with many responses highlighting that businesses will struggle to afford compliant vehicles. Around three in ten (29) businesses that provided a comment stated that they would not be able to afford an upgrade. There were also four responses requesting grant funding, and one business stating that they would expect a subsidy of some kind.

Extra Support Packages & Support Needed by Your Organisation

5.17 Businesses were asked whether they agreed that there should be extra support for a range of people and organisations, and whether their organisation would need additional support to adapt to the CAZ.

5.18 The strongest support was for SMEs operating in the CAZ, with 91.3% of business respondents saying they should be supported, whilst just 2.7% thought they should not be¹⁸.

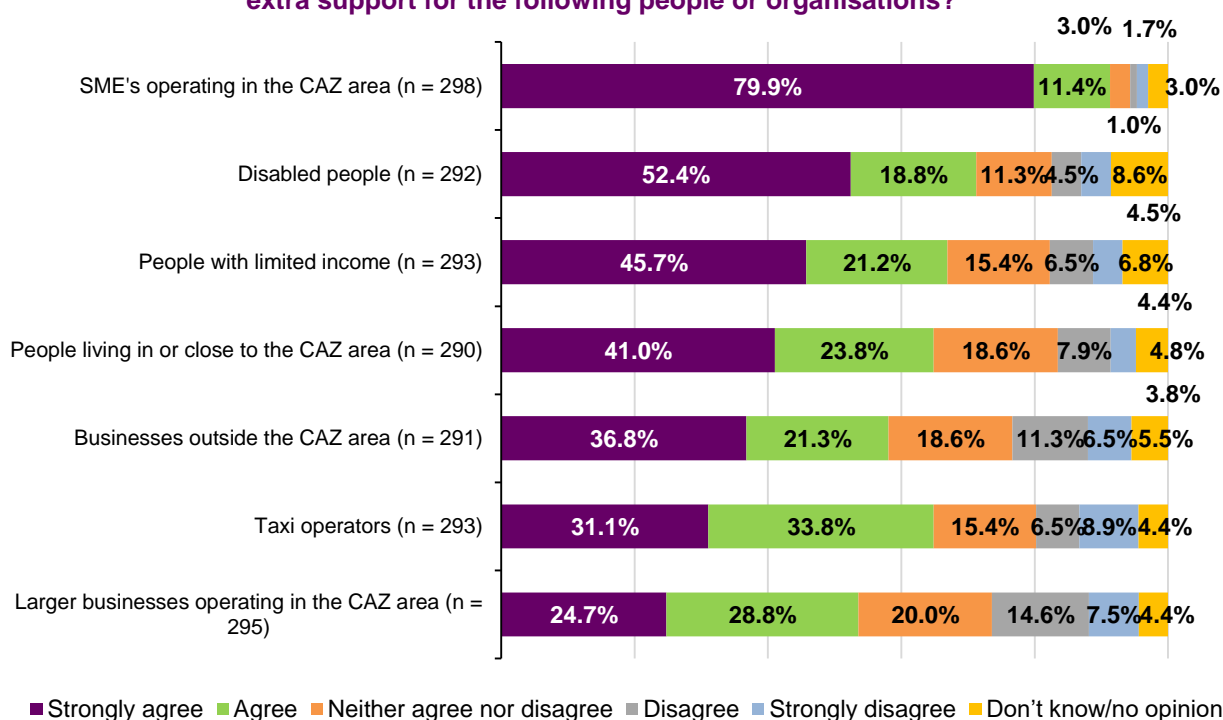
5.19 Businesses also felt that support should be provided for disabled people (71.2% in favour compared to 9.0% against), people with limited income (66.9% in favour compared to 10.9% against), taxi operators (64.9% in favour compared to 15.4% against).

5.20 Across all categories, microbusinesses were less likely than larger firms to think that extra support should be provided. Nearly 70% of business respondents said that their business / organisation would need additional support if the CAZ was introduced and a further 15% said they did not know¹⁹.

¹⁸ See appendix 4.22 for respondent breakdown.

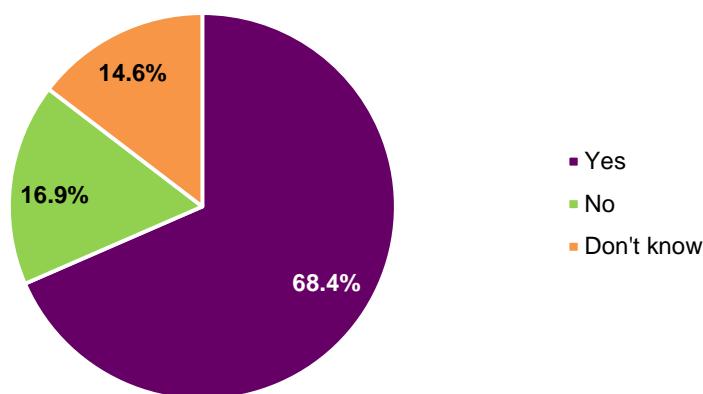
¹⁹ See appendix 4.23 for respondent breakdown.

Figure 5.4: "To what extent do you agree or disagree that there should be extra support for the following people or organisations?"



Source: Clean Air Zone Consultation 2019

Figure 5.5: "If a Clean Air Zone was introduced do you think your organisation would need extra support?"



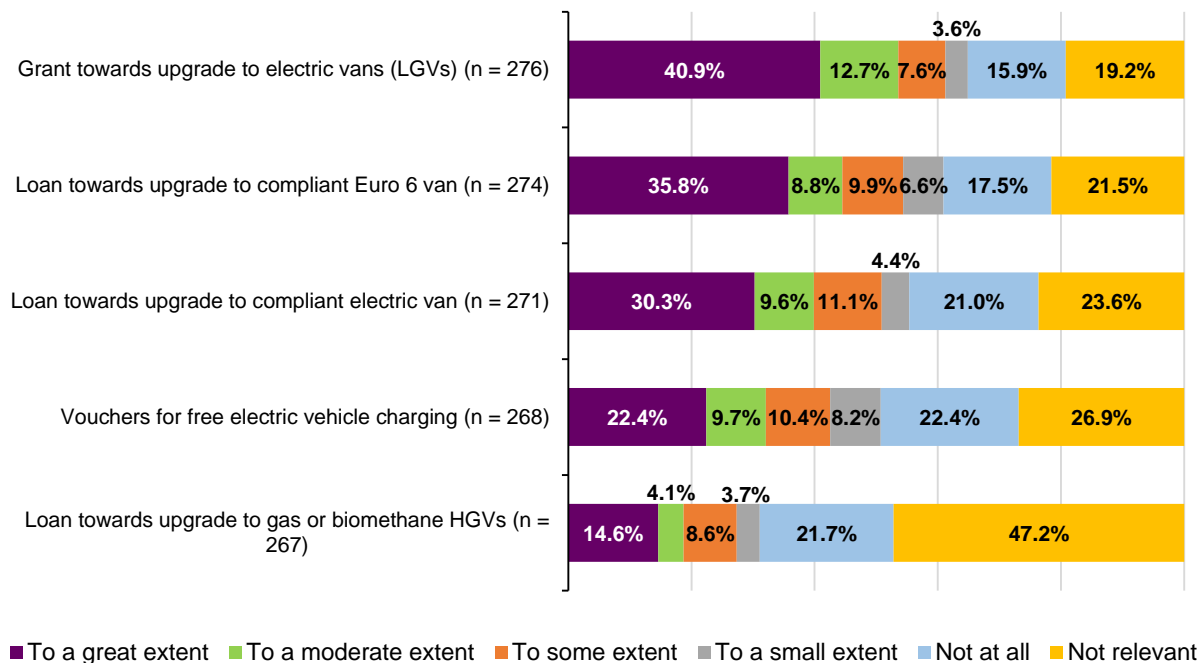
Source: Clean Air Zone Consultation 2019 (n = 301 responses)

Impact of Different Types of Support

5.21 Businesses were asked about the extent to which a variety of different support packages would help them to upgrade to a cleaner vehicle. The support which was considered to be most beneficial, with over half of businesses (53.6%) saying that it would help them to upgrade to a great or moderate extent, was the provision of grants towards upgrading to electric vans. No other option was

seen as helping to a great or moderate extent by more than half of business respondents. There was no clear relationship between business size and the impact of different types of support²⁰.

Figure 5.6: "To what extent would the proposed support packages help you to upgrade to a cleaner vehicle that would not be subject to the charge?"

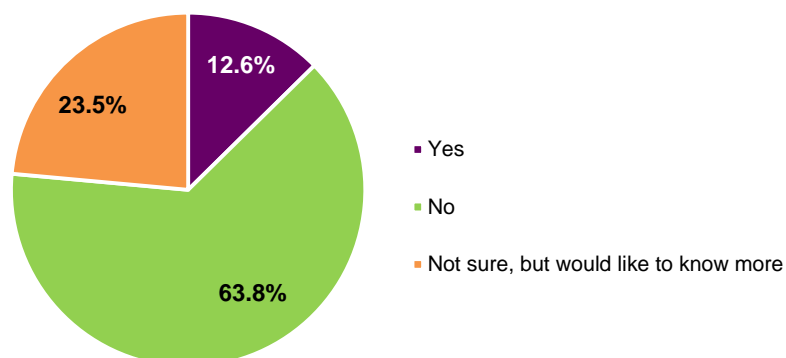


Source: Clean Air Zone Consultation 2019

Interest in a Fleet Review Service

5.22 There is scope for Sheffield City Council to work with businesses in the city to address air quality issues through improvements to business vehicle fleet. Thirty-seven business respondents (12.6%) said that they would be interested in taking up the offer of a fleet review service and 69 (23.5%) said they would be interested in finding out more²¹.

Figure 5.7: "Would you be interested in taking up the offer of a fleet review service?"



Source: Clean Air Zone Consultation 2019 (n = 293 responses)

²⁰ See appendix 4.24 for respondent breakdown.

²¹ See appendix 4.25 for respondent breakdown.

6 Other Actions to Improve Air Quality

Key Points:

- The action which most businesses would like to see Sheffield City Council take to improve air quality is improving clean public transport, which some 72.3% of businesses said they supported. This was followed by a further five actions which were supported by over half of business respondents: taking action to reduce congestion (63.2%); encouraging cycling (58.1%); encouraging walking (57.1%); encouraging low emission vehicles (56.1%); and discouraging vehicle idling (53.0%).
- Looking to the future, just over one-third of respondents said if the CAZ was extended to private cars they would support such a move to a great extent, whilst a slightly higher proportion (35.0%) would not support such a move at all.

Introduction

6.1 Businesses were asked their views on a number of further actions Sheffield City Council could take in order to improve air quality. In addition, they were also asked their views on whether, if the current Clean Air Zone (CAZ) proposal does not result in Sheffield meeting the required air quality standards, they would support a move towards charging private cars. Just over one-third of business respondents supported this move, with microbusinesses being stronger in their support than their larger counterparts.

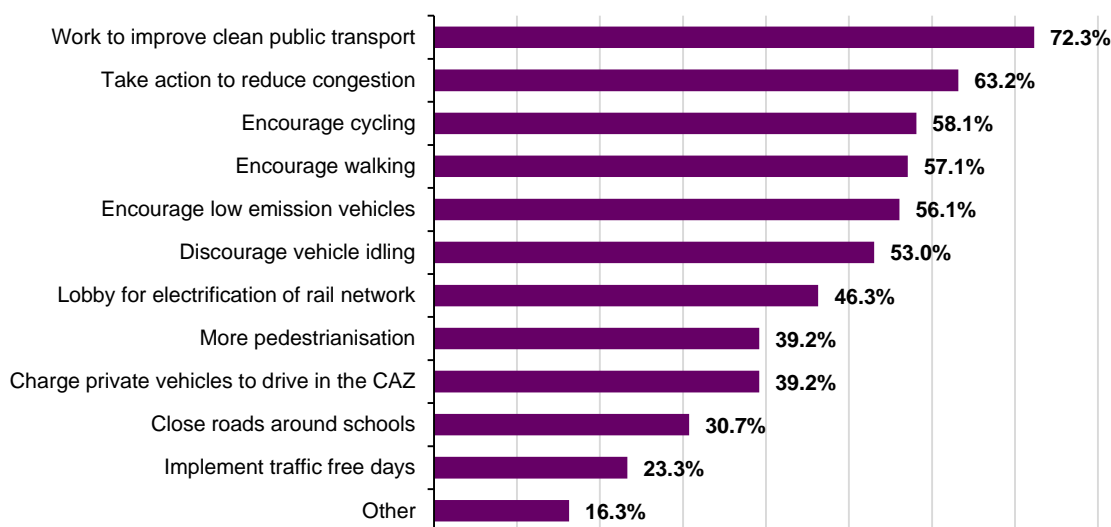
Other Actions the Council Could Take

6.2 Business respondents identified a range of other actions that the Council could take to improve air quality in the city. There was a clear majority of respondents who supported the move towards improving clean public transport, by some 72.3% of businesses. This was followed by taking action to reduce congestion (63.2%); encouraging cycling (58.1%); encouraging walking (57.1%); encouraging low emission vehicles (56.1%); and discouraging vehicle idling (53.0%) as all the further actions which received majority support. Lobbying for the electrification of the rail network was also supported by over 46.3% of businesses²².

6.3 There was less support amongst businesses for the Council to charge private vehicles which drive in the zone, and just over three in ten supported measures to close roads around school (30.7%) and to implement free traffic days (23.3%).

²² See appendix 4.26 for respondent breakdown.

Figure 6.1: "What other actions do you think Sheffield City Council should take to improve air quality in the city?"

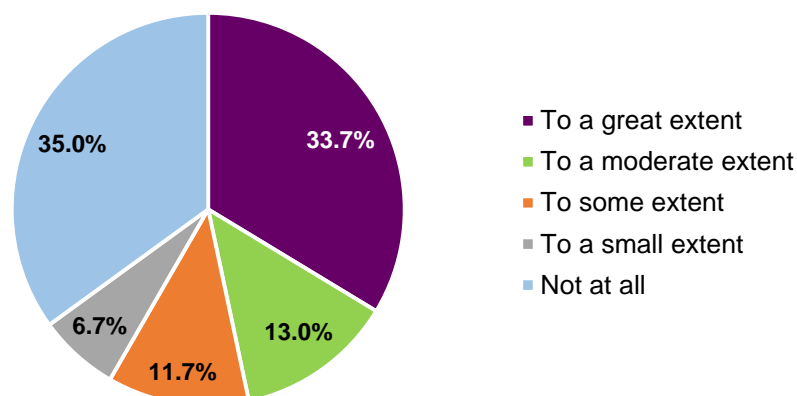


Source: Clean Air Zone Consultation 2019 (n = 296 responses)

Support for Charging Private Cars

6.4 There were mixed views amongst business respondents regarding the potential to extend charging to private cars in the future should the current CAZ proposal not have the desired impact on air quality. Just over one third of respondents said they would support such a move to a great extent, whilst a slightly higher proportion (35.0%) would not support such a move at all. Microbusinesses were slightly more favourable to the idea of charging private cars in future than larger businesses²³.

Figure 6.2: "If the Clean Air Zone does not improve air quality enough to meet legal limits, we may have to introduce charging for private cars. To what extent would you support such a move?"



Source: Clean Air Zone Consultation 2019 (n = 300 responses)

²³ See appendix 4.27 for respondent breakdown.

7 Conclusions

7.1 Businesses responding to the consultation were located across Sheffield and outside the city. Various vehicle trips are made within the CAZ as part of their day-to-day operations, including receiving deliveries within the Zone, to supply customers within the Zone or to transport people or goods through the Zone. Most business respondents (90.3%) use vehicles within Sheffield, on average business respondents owned 7.4 vehicles (the most common being a diesel van / minibus followed by diesel and petrol cars) and three-quarters (75.3%) said that at least some of their current fleet would be charged to drive within the proposed CAZ.

The Clean Air Zone Boundary and Proposed Restrictions

7.2 Overall, a greater proportion of businesses disagreed (47.7%) that the Clean Air Zone covered the right area than agreed (34.1%), and 31.8% strongly disagreed with the proposed coverage. The main issues with the CAZ boundary highlighted by businesses were the inclusion of the Inner Ring Road as part of the CAZ, given the impact that this would have on many journeys around the city.

Charges to Enter the CAZ

7.3 The proportion of businesses thinking that the proposed charges for entering the CAZ were about right ranged from 40.0% for the charge on hackney taxis to 26.8% for the charge on vans and minibuses. Nearly six in ten business respondents (58.2%) felt that the proposed charge for non-compliant vans and minibuses was too high, with the charges for buses and coaches and lorries also seen as too high by 47.8% and 45.9% of respondents respectively.

7.4 A majority of businesses felt that there should be exemptions from the CAZ charges for vehicles entering the Zone due to road diversions (85.6%), where there is no compliant vehicle on the market (60.8%) and for vintage (non-commercial) buses (51.9%). There was less support for exemptions for school buses or fairground vehicles.

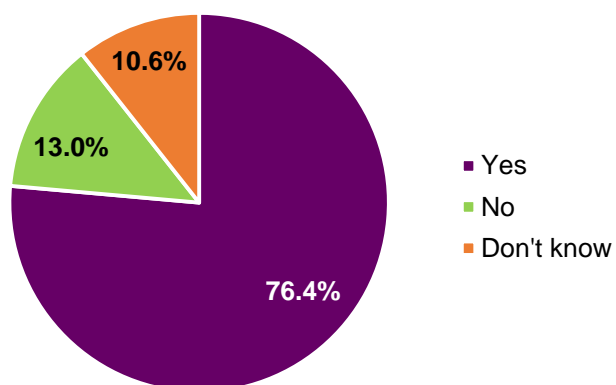
Impact of the CAZ and Likely Business Response

7.5 Overall, businesses were pessimistic about the impact of the Clean Air Zone on the city as a whole, on their organisation / business and on businesses in Sheffield in general, with more thinking that the impact would be negative than thought it would be positive. SME businesses were more likely to view the CAZ as a negative policy to themselves as well as the wider Sheffield business base, whereas larger businesses were less worried about the impact specifically to their business operations.

7.6 The exception to this was the expected impact on the health of people in Sheffield, with a majority thinking that the CAZ would have a positive or very positive impact on health (52.5% of respondents, compared to 5.7% saying it would have a negative or very negative impact).

Appendix 1: Additional Information Required to Respond to Consultation

Figure A1.1: "Do you feel that the information provided has enabled you to make an informed comment on the proposals?"



Source: Clean Air Zone Consultation 2019 (n = 301 responses)

Appendix 2: Non-Survey Responses

Introduction

In addition to the online survey responses, written submissions were also received by the City Council from a number of businesses and organisations, providing commentary and opinions on CAZ proposals.

While small local businesses made up the majority of the survey respondents, the written submissions were mostly provided by regional / national groups including trade bodies and large businesses.

Another key difference between the profile of the survey respondents and those who provided written submissions, is the lack of a voice from the construction sector which made up a significant share (16.9%) of survey respondents. Public transport operators / bodies are strongly represented in the non-survey responses, as would be expected due to the impact CAZ proposals will have on their business / members.

Concerns about the Charging Zone – Impacts on Businesses

The views of respondents generally depend on whether their organisation or business will be directly (or indirectly) affected by CAZ. The main concerns highlighted include suggestions that the CAZ disproportionately affects small businesses and public transport operators.

Impact on small businesses

A common theme within the written submissions is a concern that proposals are overly punitive on small businesses who do not have the funds to upgrade their vehicles or pay the CAZ charges, particularly given the relatively short period of time until the CAZ is proposed to come into operation.

The impact on deliveries into the city centre was highlighted by both small and larger retailers, who were concerned about who would bear the cost of entering the CAZ and whether supply chains would be adversely impacted, with out-of-town retailers not being impacted in the same way. This brings up concerns around where businesses will choose to locate in the future.

Impact on public transport and logistics

Bus and transport operators / groups argue that public transport is key to reducing emissions and that imposing hefty charges onto those operating in the clean air zone may reduce journeys, increase fares for consumers and have a detrimental impact upon the region's bus and coach network.

“[Proposals could have] an unintended detrimental reduction on the region's bus network and on long distance coach service; the measures may force bus and coach operators into difficult decisions on service levels and fares in order to meet the cost of CAZ compliance should financial assistance to achieve compliance not be forthcoming.”

“Given the current economic climate it is very difficult to make a business case for newer vehicles for commercial services. If we were then faced with having to pay a congestion [Clean Air Zone] charge on top of our other costs it would call into question the economic viability of our commercial services or we would have to put up fares to pay it.”

“It is easily the cancer that will erode the small operator”

Bus operators also mentioned that they would not be able to afford these changes to become compliant to the CAZ, leading one respondent to say that *“Nothing will really change without support for retrofit grants”*.

Other organisations and public interest groups (not involved with public transport operation) also expressed concern about the impact of proposals of services and fares.

“If there are significant increases in operating cost to bus operators there is concern this cost will be passed on to passengers and this should be avoided. Public transport patronage in Sheffield has been in decline for a number of years and the proposals could speed this decline, putting more services at risk and forcing the public to drive to work and worsening air quality.”

Various responses raised concerns about the limited time for companies to upgrade their vehicles and the availability of compliant vehicles to purchase, both new (with a number of manufacturers yet to introduce electric vans, and bulk orders from larger fleet operators making it difficult for smaller companies to purchase electric models) and in the second-hand market, which is yet to fully mature. The significant cost associated with retrofitting / replacing non-compliant vehicles was highlighted as a key barrier. A need for a longer period to replace and retrofit vehicles was identified by various submissions, due to for example long lead times to purchase compliant vehicles from manufacturers and the availability of vehicles (as noted above), and due to businesses being locked into lease agreements for non-compliant vehicles which were purchased before CAZ requirements were known.

One key stakeholder stated that *“the short timescale for operators to meet such steep compliance requirements is incredibly challenging, especially when such high vehicle costs are necessary”*, with another businesses suggesting that uncertainty in government funding and delays in the supply chain could lead to non-compliant vehicles still being in operation at the time that the CAZ is introduced. Additionally, concerns were raised regarding the availability of EV vans, particularly for smaller operators, and the risk that van users opt for compliant diesel vans in order to meet the deadline, rather than (less polluting) electric vehicles, due to a lack of availability of the EV vans within the time available.

High costs of retrofitting HGV's, and for many the only viable option is to replace vehicles was also identified, with one key organisation flagged the limited second hand market for Euro 6 vans, and the financial penalty faced by van operators who currently run Euro 5 vans, the residual value of which has significantly depreciated given the requirement for Euro 6 standards in CAZs in future.

Other Concerns

There are a range of views within the submissions on which vehicles should be deemed compliant or non-compliant.

An argument was made to class older Hybrid Electric Vehicles which offer good environmental performance as compliant, to avoid penalising early hybrid adopters. Reference is made to Transport for London which allow some older electric vehicles into the London Ultra Low Emission Zone.

A number of submissions expressed concerns about the proposed area to be covered by the CAZ, particularly the inclusion of the Inner Ring Road. Businesses and organisations expressed concern that this may force more vehicles onto smaller residential roads in order to avoid the CAZ, increasing journey times, congestion and pollution. This is in line with responses to the online survey.

A lack of electric vehicle charging infrastructure was also noted as a barrier (alongside cost) to upgrading to compliant vehicles. For instance, one large organisation who is currently trying to

electrify their fleet point to “a lack of grid capacity is preventing private companies from investing in electric vehicles, inhibiting the ability of cities across the UK to achieve its goal of cleaner and more sustainable vehicles”.

One written response was concerned with the behavioural response of drivers across Sheffield and Rotherham. Being wary of the fact that many drivers (notably taxi drivers) would decide to commute on alternate routes or work elsewhere, there was a concern that there could, unintentionally, be displacement of non-compliant cars travelling in adjoining local authority areas rather than upgrading or retrofitting their vehicles to become compliant.

Concerns about the Charging Zone – Does it Go Far Enough?

The majority of submissions from businesses and organisations highlighted that the current proposals do not include significant measures to tackle emissions from private cars – with many respondents noting that private vehicles are in fact the largest polluters.

“Sheffield City Council’s own modelling shows that 81% of the vehicles captured in the model are private cars and yet disappointingly the Council is choosing to submit proposals for a Cat C rather than a Cat D scheme, allowing private cars to escape any form of charge.”

“[We] recognise the detrimental effect of car usage on air quality. To not target measures against cars would not sufficiently encourage modal shift.”

Positive Reflections on the CAZ

All submissions express their support for measures which tackle pollution and emissions, although opinions differ on the way in which this should be achieved.

One response stated that the introduction of a Clean Air Zone would have a positive impact upon their organisation, people’s health, businesses and Sheffield as a whole.

The majority of submissions which expressed a view on private cars, recognised that there may be a need to impose charges on non-compliant private cars if the proposed CAZ model is not successful in achieving reductions in air pollution. However, a business which operates in Sheffield argued that a charge on cars would deter customers from the city centre and wish to see no charge maintained, together with dedicated park & ride schemes targeting the main shopping areas and department stores.

Conclusions

There is a general consensus amongst the submissions from businesses and organisations that action needs to be taken to reduce pollution and support low carbon objectives, although many respondents differ in their opinions based on how much proposals will directly or indirectly affect them.

In summary, the written submissions expressed:

1. Concern that proposals disproportionately affect public transport and smaller businesses
2. A need for more time and financial support to allow businesses, bus and coach operators to upgrade their vehicles

3. A request for greater investment into electric vehicle charging infrastructure.
4. Concern that private cars are not included in CAZ proposals when they cause the majority of the emissions and have biggest impact upon congestion.

Appendix 3: Questionnaire

Clean Air Zone Consultation - Businesses and Organisations

Overview

Improving the air we breathe in Sheffield

a Clean Air Zone for Sheffield.



Pollution in the air that we breathe is damaging the health of people living, working and visiting our city. It is stunting lung development in children and contributing to lifelong health problems such as asthma and cardiovascular disease.

We are committed to cleaning the air that we breathe in Sheffield and making the long-term changes that we need to tackle pollution in our city. But, we start by taking action now.

As part of this, we are proposing to introduce a daily Clean Air charge for some of the most polluting vehicles to drive in the city centre and on the inner ring road. The charge won't be for private cars but will impact on buses, lorries (HGVs), taxi and private hire vehicles and vans (LGVs) that don't meet minimum emission standards.

The '*Clean Air Zone*' in Sheffield is one of the steps that we need to take in order to reduce Nitrogen Dioxide (NO₂) below the legal limit by 2021.

Charging doesn't in itself clean our air but will encourage people and businesses to replace polluting vehicles with cleaner ones that wouldn't be charged. We are seeking money from Government to support our bus companies, businesses and taxi drivers to replace older, polluting vehicles so that our air quality is at least within healthier, legal limits.

This is the start of a conversation in Sheffield about our health, how we get around the city and how, alongside the Clean Air Zone, how we can all improve the air we breathe.

Why we are consulting

The Clean Air Zone is a big change for Sheffield and we want your views on the proposals and ideas about how we work together to tackle air pollution in our city.

About You

1 What is the name of your business or organisation?

2 What is your name?

3 What is your job title/role in the organisation?

4 What is your email address?

5 May we contact you further about this consultation and the Clean Air Zone for Sheffield?

Please select only one item

Yes No

6 What sector does your organisation fall into?

Please select only one item

- Accommodation & food services Agriculture, forestry & fishing
 Arts, entertainment, recreation and other services Business administration and support services
 Construction Education Finance & insurance Health
 Information & communication Mining, quarrying and utilities Motor trades Production
 Professional, scientific & technical Property
 Public administration and defence (included local authorities) Retail Third sector/charity
 Transport Storage (inc. postal) Wholesale Other

7 What is the postcode of your organisation's main site?

If you have sites in Sheffield and elsewhere, please give the Sheffield postcode.

8 How many employees does your organisation have in Sheffield?

Please select only one item

- 0 to 9 10 to 49 50 to 249 250+

About the Clean Air Zone

We are required to reduce Nitrogen Dioxide emissions below the legal limit in the shortest possible time. Based on our detailed analysis of Nitrogen Dioxide pollution and traffic flows in Sheffield and Rotherham, we are proposing a 'Class C' charging Clean Air Zone (CAZ C) within (and including) the inner ring road of the city centre. This covers the area of the city centre that is bounded by *and including* the A61, so if you drive on the inner ring road in a non-compliant vehicle you may be subject to a charge.



If you would like to see a higher resolution version of the map above please follow [this link](#) `<user_uploads/proposed-clean-air-zone-1.png>` .

Our proposals for a Class C CAZ mean that there will be a daily charge for the most polluting buses, taxis, vans and lorries to drive in the Clean Air Zone. Broadly speaking, these are vehicles that do not meet Euro 6 (2016) standards for diesel or Euro 4 (2006) standards for petrol.

In Sheffield, we will require taxis (Hackney carriages and private hire vehicles) to be ultra low emission vehicles.

Automatic Number Plate Recognition (ANPR) cameras will be installed at all points where you can enter the inner ringroad in Sheffield.

The ANPR cameras will take a picture of vehicles within the zone and when *non-compliant vehicles (non-compliant buses, taxis, lorries and vans) that are not exempt from the zone are identified*, the driver/owner will have 24 hours to pay the proposed charge.

The zone will operate 24 hours a day, 7 days a week, throughout the whole year.

If you drive in the proposed Zone in a non-compliant vehicle, you will have to log on to a Government website to pay the charge.

If non-compliant vehicles drive through the zone and do not pay the charge they will be issued with a penalty charge notice.

9 Do you agree or disagree that the proposed Clean Air Zone covers the right area?

This question is just about the area the proposed Clean Air Zone covers and which roads are included.

Please select only one item

Strongly Agree Agree Neither Agree nor Disagree Disagree Strongly Disagree

10 Do you have any comments on the proposed area of the Clean Air Zone?

This question is just about the area the proposed Clean Air Zone covers and which roads are included. If you think there are roads which should or shouldn't be included in the Zone, please include your reasons.

CAZ Area comments

11 How many sites does your organisation have:

	0	1	2-5	6-10	11-20	21-50	51+
In the proposed CAZ area <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Sheffield but outside the CAZ area <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outside Sheffield <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12 Roughly how many vehicle trips per week are made in the proposed CAZ area as part of your organisation's operation?

	Fewer than 1 trip per week	1 to 9 trips per week	10 to 49 trips per week	50 to 249 trips per week	250+ trips per week	Don't know
I receive deliveries/collections to my organisation within the proposed CAZ <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I supply goods and services to customers or service users in the proposed CAZ <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I transport people or goods in or through the proposed CAZ (e.g. courier, haulier, taxi, bus, firm, ambulance) <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Clean Air Zone Restrictions

The next question is about the type of vehicle (car, van etc.) which should be included in the Clean Air Zone restrictions. Remember that only vehicles with more polluting engines will have to pay the charge and that the engine standards (Euro 4 for petrol, Euro 6 (VI) for diesel) have already been decided.

13 Which types of vehicle do you think should be included in the Clean Air Zone restrictions?

	Should be subject to a CAZ charge	Should not be subject to a CAZ charge	Don't know
Buses and coaches <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lorries (HGVs) <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxis and private hire vehicles <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vans (LGVs) and minibuses <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cars <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Motorcycles and mopeds <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Your organisation's vehicles

Whether you have to pay to drive in the Clean Air Zone depends on the type of fuel and the standard of engine your vehicle has. Engine standards are described as 'Euro' followed by a number – the higher the number, the newer and cleaner the engine.

Sheffield is proposing to introduce a Class C Clean Air Zone

This means that all *non-compliant* vehicles - buses, taxis, Heavy Goods Vehicles (HGVs) and Light Goods Vehicles (LGVs) will be charged a daily clean air zone fee for driving onto the inner ring road/A61 and anywhere within the boundary of the ring road.

Private cars will not be subject to any CAZ charge under these proposals.

Non-compliant broadly refers to diesel vehicles that are older than Euro 6 (around 2016) or petrol vehicles that are older than Euro 4 (around 2006) except for taxis where we are seeking a higher standard of low emission vehicle.

More information about CAZ Class C minimum classes and standards is given below.

Clean Air Zone Class C minimum classes and standards

Vehicle type	Euro Category	Euro standard
Bus	M3 (GVW[1] <#_ftn1> over 5000 kg and more than 8 seats in addition to the driver)	Euro VI
Coach	M2 (GVW not exceeding 5000 kg, ref mass[2] <#_ftn2> exceeding 2610 kg and more than 8 seats in addition to the driver)	Euro VI
HGV	N2 (GVW over 3500 kg and ref. mass over 2610 kg) N3 (GVW over 5000kg)	Euro VI
Large van	N1 (GVW not exceeding 3500 kg and ref. mass over 1305 kg but not exceeding 2840 kg) N2 (GVW over 3500 kg and ref. mass not exceeding 2840kg)	Euro 6 (diesel) Euro 4 (petrol)
Minibus	M2 (GVW not exceeding 5000 kg, ref. mass not exceeding 2840 kg and more than 8 seats in addition to the driver)	Euro 6 (diesel) Euro 4 (petrol)
Small van/light commercial	N1 (GVW not exceeding 3500 kg and ref. mass not exceeding 1305 kg)	Euro 6 (diesel) Euro 4 (petrol)
Taxi and private hire	Minibus - M2 (GVW not exceeding 5000 kg, ref. mass not exceeding 2840 kg and more than 8 seats in addition to the driver) Passenger vehicle with up to 8 seats in addition to the driver	ULEV*

**In Sheffield, we are proposing higher standards for taxis (Hackney carriages and private hire vehicles) than the national clean air framework.*

For Hackney carriages, we will require LPG/electric vehicles.

For Private hire, we will require petrol hybrid/electric vehicles.

Motorcycles and mopeds (optional)

Euro 3

Ultra low emission vehicles with significant zero emission range will never be charged for entering or moving through a Clean Air Zone

Source: Clean Air Zone Framework - Principles for setting up Clean Air Zones in England

<https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/612592/clean-air-zone-framework.pdf>

[1] <#_ftnref1> GVW - Gross Vehicle Weight

[2] <#_ftnref2> Ref. mass is defined in the Euro standards as mass in running order plus 25 kg. This broadly equates to the unladen mass of the vehicle with a driver and an additional 25 kg mass. It will be specified by the vehicle manufacturer.

14 Does your organisation use vehicles in Sheffield?

Please select only one item

Our organisation does not use any vehicles Our organisation uses vehicles

Types of vehicle used

15 Thinking about the vehicles which you own or have on long term lease in Sheffield, roughly how many of each of the following do you have? In each box, please enter whole numbers only (1, 2, 3, etc.) or leave blank if zero.

Motorbikes, scooters or mopeds owned

Motorbikes, scooters or mopeds loaned or long-term leased

Petrol cars owned

Petrol cars loaned or long-term leased

Diesel cars owned

Diesel cars loaned or long-term leased

Other fuel cars (including electric, LPG, hybrid) owned

Other fuel cars (including electric, LPG, hybrid) loaned or long-term leased

Petrol vans/minibuses (passenger vehicles with more than 8 seats, and less than 5 tonnes gross vehicle weight) owned

Petrol vans/minibuses (passenger vehicles with more than 8 seats, and less than 5 tonnes gross vehicle weight) loaned or long-term leased

Diesel vans/minibuses (passenger vehicles with more than 8 seats, and less than 5 tonnes gross vehicle weight) owned

Diesel vans/minibuses (passenger vehicles with more than 8 seats, and less than 5 tonnes gross vehicle weight) loaned or long-term leased

Q15m Heavy Goods Vehicles (lorries or specialist vehicles more than 3.5 tonnes gross vehicle weight) owned

Heavy Goods Vehicles (lorries or specialist vehicles more than 3.5 tonnes gross vehicle weight) loaned or long-term leased

Coaches or buses (passenger vehicles with more than 8 seats, and less than 5 tonnes gross vehicle weight) owned

Coaches or buses (passenger vehicles with more than 8 seats, and less than 5 tonnes gross vehicle weight) loaned or long-term leased

16 Roughly what proportion of your current fleet would be charged to drive in the proposed Clean Air Zone?

Please select only one item

- None Less than a quarter Between a quarter and a half
 Between a half and three quarters More than three quarters All

You may also like to tell us more about the types of vehicles you use and how many of them are currently compliant/not compliant with Clean Air Zone restrictions.

17 In general, how often do you usually upgrade or replace vehicles your organisation uses?

Please select only one item

- More than every two years About every two to four years About every four to six years
 About every six to eight years About every eight to ten years Less than every ten years

The proposed daily charge for non-compliant vehicles

The charge for driving in the Clean Air Zone needs to be enough to encourage people to change their travel behaviour or to replace their more polluting vehicles with cleaner ones, but no more than that.

In our Clean Air Zone proposals, we are suggesting the following daily charges for non-compliant vehicles:

Vehicle type	Daily charge
Buses, coaches and lorries (HGVs)	£50 a day
Taxis and Private Hire Vehicles	£10 a day
Vans (LGVs)	£10 a day

18 What do you think about the proposed level of charge for different non-compliant vehicles?

	Too high	Too low	About right	Don't know
Buses and Coaches <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lorries (HGVs) <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hackney Taxis <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Hire Vehicles <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vans (LGVs) and minibuses <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Vehicles that will not be charged

Some vehicles will be exempt from paying charges for entering or driving within Clean Air Zones across the country because of guidance (the National Clean Air Zone Framework) produced by the government for local authorities.

These vehicles include:

- Historic tax class (i.e. vehicles that are over 40 years old)
- Military vehicles
- Specialist vehicles used by the emergency services
- Certain types of non-road going vehicles that may drive on the highway such as agricultural machines, digging machines, mobile cranes, etc.

19 Do you agree or disagree that the following vehicles or circumstances should be exempted at this stage?

	Agree	Disagree	Don't know
Showmen's guild vehicles (e.g. fairground and fun fair vehicles) <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vintage buses (non-commercial) <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School buses <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where there is no compliant vehicle available on the market <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vehicles entering the Clean Air Zone due to diversions on the road network <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

20 Do you have any other comments about the proposed level of Clean Air Zone charge in Sheffield?

How the Clean Air Zone affects your organisation or business

21 If a Clean Air Zone was introduced what do you think would be the overall impact for the following? Please tick one option per row.

	Very positive	Positive	Neutral/no impact	Negative	Very negative	Don't know/no opinion
Your organisation/business <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The health of people in Sheffield <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Businesses in Sheffield <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sheffield as a city <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

22 If the proposed Clean Air Zone was introduced, how do you think it might affect your organisation/business?

You might want to think about any possible impacts on your employees, customers or suppliers.

23 If the proposed charges are introduced, how are you likely to respond? Please choose up to three answers, where '1' is most likely response, '2' is second most likely, etc.

	1	2	3
Just pay the daily charge <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Look to replace non-compliant vehicle(s) with a compliant one(s) <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relocate the business to outside the CAZ <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relocate the supply chain to outside the CAZ <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase prices to cover the charge <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reduce the number of journeys in the CAZ <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Divert journeys around the CAZ <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cease trading <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24 If you were to upgrade your business vehicle(s) from non-compliant to compliant one(s), how are you most likely to finance this?

Please select only one item

- Buy outright
 Bank finance
 Lease agreement
 Personal contract purchase
 Hire purchase
 Other (please state)

Support for organisations and individuals

The key part of our Clean Air Zone proposal is to replace the older fleets of vehicles on our roads with cleaner alternatives. We are looking to use money from Government to find ways to support businesses and drivers to access cleaner vehicles which will reduce NO₂ pollution and mean that drivers aren't charged in the CAZ.

The money we will have available will be limited to what we are allocated by Government and there are legal restrictions on how we can support businesses. But, we are proposing to offer some of the following to support Sheffield drivers and organisations, (subject to availability and eligibility criteria):

- Grants towards the upgrade to electric vans (LGVs)
- Interest-free loans to some companies towards the retrofit upgrade their HGVs to gas or biomethane alternatives
- Interest-free loans for LGV drivers towards upgrade or replacement of their vans with a Euro 6 or electric alternative
- Wider support, such as vouchers for electric vehicle charging.
- Business fleet advice about vehicle choice, fuel economy, mileage reduction strategies to lower running costs and reduce emissions

25 To what extent do you agree or disagree that there should be extra support for the following people or organisations? Please tick one option per row.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/no opinion
Small and medium sized enterprises operating in the CAZ area <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Larger businesses and organisations operating in the CAZ area <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Businesses and organisations outside the CAZ area <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxi operators <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People living in or close to the CAZ area <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People with limited income <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Disabled people <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

26 Do you have any additional comments on the type of support which could be provided, and who it should be for?

27 If a Clean Air Zone was introduced do you think your organisation would need extra support?

Please select only one item

Yes No Don't know

If you answered 'no' or 'don't know', you don't need to answer the next question.

28 If you answered 'yes' to the previous question, what kind of support do you think you would need and why?

29 To what extent would the proposed support packages help you to upgrade to a cleaner vehicle that would not be subject to the charge?

	To a great extent	To a moderate extent	To some extent	To a small extent	Not at all	Not relevant
Grant towards upgrade to electric vans (LGVs) (eg. plug-in van grant) <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loan towards upgrade to compliant Euro 6 van <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loan towards upgrade to compliant electric van <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loan towards upgrade to gas or biomethane HGVs <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vouchers for free electric vehicle charging <i>Please select only one item</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

30 Would you be interested in taking up the offer of a fleet review service?

A fleet review is a tailored review to help organisations make their fleets more efficient, sustainable, cost effective and lower emissions through advice on vehicle choice, fuel economy, mileage reduction and staff engagement strategies.

If you are interested in a fleet review or would like to know more, we may contact you further on the email address you have provided. If you do not wish us to contact you about a fleet review, please answer 'No'.

Please select only one item

Yes Not sure, but would like to know more No

Air that is safe to breathe for all in Sheffield

The Clean Air Zone is not the only thing we are doing to reduce the air pollution caused by road transport. We are already investing in public transport and routes for cycling, building charging points for electric vehicles and have a new policy on taxi emissions.

31 What other actions do you think Sheffield City Council should take to improve air quality in the city?

Please select all that apply

- Charge private vehicles to drive in the CAZ Implement traffic free days
 Encourage low emission vehicles Encourage cycling Encourage walking
 More pedestrianisation Work to improve clean public transport
 Take action to reduce congestion Lobby for electrification of rail network
 Discourage vehicle idling Close roads around schools Other (please state)

32 If the Clean Air Zone does not improve air quality enough to meet legal limits, we may have to introduce charging for private cars. To what extent would you support such a move?

Please select only one item

- To a great extent To a moderate extent To some extent To a small extent
 Not at all

About this consultation

33 Do you feel that the information provided has enabled you to make an informed comment on the proposals?

Please select only one item

- Yes No Don't know

34 What additional information would have helped you to comment on the proposals?

Appendix 4: Data Tables

Appendix 4.1: Business Respondents - Roles

What is your job title/role in the organisation?		
Role	Count	Percentage
Director	111	36.8%
Sole trader	73	24.2%
Manager	30	9.9%
Other	88	29.1%
Total	302	100.0%
Not Answered	5	-

Source: Clean Air Zone Consultation 2019 (n = 302 responses)

Appendix 4.2: Business Respondents - Sector

What sector does your organisation fall into?		
Sector	Count	Percentage
Construction	52	16.9%
Other	50	16.3%
Transport	48	15.6%
Retail	26	8.5%
Professional, scientific & technical	15	4.9%
Property	15	4.9%
Production	15	4.9%
Arts, entertainment, recreation and other services	13	4.2%
Third sector/charity	12	3.9%
Education	11	3.6%
Health	10	3.3%
Accommodation & food services	9	2.9%
Information & communication	7	2.3%
Motor trades	6	2.0%
Wholesale	5	1.6%
Agriculture, forestry & fishing	4	1.3%
Public administration and defence (included local authorities)	3	1.0%
Business administration and support services	2	0.7%
Not Answered	2	0.7%
Finance & insurance	1	0.3%
Mining, quarrying and utilities	1	0.3%
Total	307	100.0%

Source: Clean Air Zone Consultation 2019 (n = 307 responses)

Appendix 4.4: Business Respondents – Sheffield Ward

What is the postcode of your organisation's main site?		
Ward Name	Count	Percentage
City	65	27.7%
Hillsborough	23	9.8%
Darnall	17	7.2%
Nether Edge & Sharrow	14	6.0%
Broomhill & Sharrow Vale	10	4.3%
Gleadless Valley	10	4.3%
Burngreave	9	3.8%
Stannington	8	3.4%
Fulwood	7	3.0%
Graves Park	7	3.0%
Walkley	6	2.6%
Manor Castle	6	2.6%
Ecclesall	5	2.1%
Woodhouse	5	2.1%
Southey	5	2.1%
Crookes & Crosspool	4	1.7%
Birley	4	1.7%
West Ecclesfield	4	1.7%
Dore & Totley	3	1.3%
Richmond	3	1.3%
Beighton	3	1.3%
Stocksbridge & Upper Don	3	1.3%
East Ecclesfield	3	1.3%
Shiregreen & Brightside	3	1.3%
Firth Park	3	1.3%
Mosborough	2	0.9%
Beauchief & Greenhill	2	0.9%
Park & Arbourthorne	1	0.4%
Total (in Sheffield)	235	100.0%
Not answered / Outside Sheffield	72	-

Source: Clean Air Zone Consultation 2019 (n = 235 responses)

Appendix 4.5: Business Respondents – Employment Size

How many employees does your organisation have in Sheffield?		
Sector	Count	Percentage
0 to 9	213	70.1%
10 to 49	55	18.1%
50 to 249	18	5.9%
250+	18	5.9%
Total	304	100.0%
Not Answered	3	-

Source: Clean Air Zone Consultation 2019 (n = 304 responses)

Appendix 4.6: “Do you agree or disagree that the proposed Clean Air Zone covers the right area?”

Do you agree or disagree that the proposed Clean Air Zone covers the right area?		
	Count	Percentage
Strongly Agree	23	7.6%
Agree	80	26.5%
Neither Agree nor Disagree	55	18.2%
Disagree	48	15.9%
Strongly Disagree	96	31.8%
Total	302	100.0%
Not Answered	5	-

Source: Clean Air Zone Consultation 2019 (n = 302 responses)

Appendix 4.7: “How many sites does your organisation have in the proposed CAZ area?”

How many sites does your organisation have in the proposed CAZ area?		
Number of Sites	Count	Percentage
Zero	160	57.8%
1	71	25.6%
2-5	20	7.2%
6-10	8	2.9%
11-20	4	1.4%
21-50	3	1.1%
51+	11	4.0%
Total	277	100.0%
Not Answered	30	-

Source: Clean Air Zone Consultation 2019 (n = 277 responses)

Appendix 4.8: “How many sites does your organisation have in Sheffield but outside the CAZ area?”

How many sites does your organisation have in Sheffield but outside the CAZ area?		
Number of Sites	Count	Percentage
Zero	62	22.1%
1	142	50.7%
2-5	32	11.4%
6-10	7	2.5%
11-20	14	5.0%
21-50	8	2.9%
51+	15	5.4%
Total	280	100.0%
Not Answered	27	-

Source: Clean Air Zone Consultation 2019 (n = 280 responses)

Appendix 4.9: “How many sites does your organisation have outside of Sheffield?”

How many sites does your organisation have outside of Sheffield?		
Number of Sites	Count	Percentage
Zero	127	54.7%
1	54	23.3%
2-5	11	4.7%
6-10	3	1.3%
11-20	9	3.9%
21-50	5	2.2%
51+	23	9.9%
Total	232	100.0%
Not Answered	75	-

Source: Clean Air Zone Consultation 2019 (n = 232 responses)

Appendix 4.10: “Roughly how many vehicle trips per week are made in the proposed CAZ area as part of your organisation’s operation?”

Roughly how many vehicle trips per week are made in the proposed CAZ area as part of your organisation’s operation?			
Number of Trips	Deliveries/collections to my organisation	I supply good/services to users in the zone	I transport people/goods in or through the zone
Fewer than 1 trip per week	69	62	80
1 to 9 trips per week	71	91	59
10 to 49 trips per week	63	77	52
50 to 249 trips per week	18	14	24
250+ trips per week	8	8	15
Don’t know	15	18	18
Total	244	270	248
Not Answered	63	37	59
Number of Trips	Deliveries/collections to my organisation	I supply good/services to users in the zone	Transport people/goods in/through the zone
Fewer than 1 trip per week	28.3%	23.0%	32.3%
1 to 9 trips per week	29.1%	33.7%	23.8%
10 to 49 trips per week	25.8%	28.5%	21.0%
50 to 249 trips per week	7.4%	5.2%	9.7%
250+ trips per week	3.3%	3.0%	6.0%
Don’t know	6.1%	6.7%	7.3%
Total	100.0%	100.0%	100.0%
Not Answered	-	-	-

Source: Clean Air Zone Consultation 2019

Appendix 4.11: “Which types of vehicle do you think should be included in the Clean Air Zone restrictions?”

"Which types of vehicle do you think should be included in the Clean Air Zone restrictions?"						
Included in the Charge?	Buses and coaches	Lorries HGVs	Taxis and private hire vehicles	Vans (LGVs) and minibuses	Cars	Motorcycles and mopeds
Should be subject to a CAZ charge	207	202	188	125	129	84
Should not be subject to a CAZ charge	60	71	74	146	139	165
Don't know	23	20	25	21	21	30
Total	290	293	287	292	289	279
Not Answered	17	14	20	15	18	28
Included in the Charge?	Buses and coaches	Lorries HGVs	Taxis and private hire vehicles	Vans (LGVs) and minibuses	Cars	Motorcycles and mopeds
Should be subject to a CAZ charge	71.4%	68.9%	65.5%	42.8%	44.6%	30.1%
Should not be subject to a CAZ charge	20.7%	24.2%	25.8%	50.0%	48.1%	59.1%
Don't know	7.9%	6.8%	8.7%	7.2%	7.3%	10.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Not Answered	-	-	-	-	-	-

Source: Clean Air Zone Consultation 2019

Appendix 4.12: “Does your organisation use vehicles in Sheffield?”

Does your organisation use vehicles in Sheffield?		
Vehicle Use	Count	Percentage
Our organisation uses vehicles	277	92.0%
Our organisation does not use any vehicles	24	8.0%
Total	301	100.0%
Not Answered	6	-

Source: Clean Air Zone Consultation 2019 (n = 301 responses)

Appendix 4.13: "Thinking about the vehicles which you own or have on long term lease in Sheffield, which of the following do you own / lease?"

"Thinking about the vehicles which you own or have on long term lease in Sheffield, which of the following do you own / lease?"		
Vehicles	Own	Loan or long-term lease
Diesel vans/minibuses	158	35
Diesel cars	109	33
Petrol cars	73	22
HGVs	28	7
Other fuel cars (including electric, LPG, hybrid) owned	20	13
Motorbikes, scooters or mopeds	17	1
Petrol vans/minibuses	12	5
Coaches or buses	12	5
Total	265	265

Vehicles	Own	Loan or long-term lease
Diesel vans/minibuses	59.6%	13.2%
Diesel cars	41.1%	12.5%
Petrol cars	27.5%	8.3%
HGVs	10.6%	2.6%
Other fuel cars (including electric, LPG, hybrid) owned	7.5%	4.9%
Motorbikes, scooters or mopeds	6.4%	0.4%
Petrol vans/minibuses	4.5%	1.9%
Coaches or buses	4.5%	1.9%
Total	100.0%	100.0%

Source: Clean Air Zone Consultation 2019 (n = 265 responses)

Appendix 4.14: "Roughly what proportion of your current fleet would be charged to drive in the proposed Clean Air Zone?"

Roughly what proportion of your current fleet would be charged to drive in the proposed Clean Air Zone?		
Proportion of Fleet	Count	Percentage
None	42	15.3%
Less than a quarter	24	8.8%
Between a quarter and a half	27	9.9%
Between a half and three quarters	30	10.9%
More than three quarters	23	8.4%
All	128	46.7%
Total	274	100.0%
Not Answered	33	-

Source: Clean Air Zone Consultation 2019 (n = 274 responses)

Appendix 4.15: “In general, how often do you usually upgrade or replace vehicles your organisation uses?”

In general, how often do you usually upgrade or replace vehicles your organisation uses?		
Upgrade Frequency	Count	Percentage
More than every two years	3	1.1%
About every two to four years	60	22.6%
About every four to six years	76	28.7%
About every six to eight years	37	14.0%
About every eight to ten years	53	20.0%
Less than every ten years	36	13.6%
Total	265	100.0%
Not Answered	42	-

Source: Clean Air Zone Consultation 2019 (n = 265 responses)

Appendix 4.16: “What do you think about the proposed level of charge for different non-compliant vehicles?”

What do you think about the proposed level of charge for different non-compliant vehicles?					
	Buses and Coaches	Lorries (HGVs)	Hackney Taxis	Private Hire Vehicles	Vans (LGVs) and minibuses
About right	102	105	116	111	80
Too low	9	17	45	45	20
Too high	140	136	92	96	174
Don't know	42	38	37	38	25
Total	293	296	290	290	299
Not Answered	14	11	17	17	8
	Buses and Coaches	Lorries (HGVs)	Hackney Taxis	Private Hire Vehicles	Vans (LGVs) and minibuses
Too high	47.8%	45.9%	31.7%	33.1%	58.2%
About right	34.8%	35.5%	40.0%	38.3%	26.8%
Too low	3.1%	5.7%	15.5%	15.5%	6.7%
Don't know	14.3%	12.8%	12.8%	13.1%	8.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Not Answered	-	-	-	-	-

Source: Clean Air Zone Consultation 2019

Appendix 4.17: “Do you agree or disagree that the following vehicles or circumstances should be exempted at this stage?”

Do you agree or disagree that the following vehicles or circumstances should be exempted at this stage?

	Fairground and fun fair vehicles	Vintage buses (non-commercial)	School buses	Where there is no compliant vehicle on the market	Entering the zone due to road diversions
Agree	77	153	129	180	255
Disagree	184	110	144	54	34
Don't know	34	32	22	62	9
Total	295	295	295	296	298
Not Answered	12	12	12	11	9
	Fairground and fun fair vehicles	Vintage buses (non-commercial)	School buses	Where there is no compliant vehicle on the market	Entering the zone due to road diversions
Agree	26.1%	51.9%	43.7%	60.8%	85.6%
Disagree	62.4%	37.3%	48.8%	18.2%	11.4%
Don't know	11.5%	10.8%	7.5%	20.9%	3.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Not Answered	-	-	-	-	-

Source: Clean Air Zone Consultation 2019

Appendix 4.18: “Do you agree or disagree that the following vehicles or circumstances should be exempted at this stage?”

If a Clean Air Zone was introduced what do you think would be the overall impact for the following?

	Your organisation/business	The health of people in Sheffield	Businesses in Sheffield	Sheffield as a city
Very positive	22	62	19	50
Positive	33	95	23	69
Neutral/no impact	34	109	25	40
Negative	71	12	98	55
Very negative	138	5	119	75
Don't know/no opinion	3	16	16	11
Total	301	299	300	300
Not Answered	6	8	7	7
	Your organisation/business	The health of people in Sheffield	Businesses in Sheffield	Sheffield as a city
Very positive	7.3%	20.7%	6.3%	16.7%
Positive	11.0%	31.8%	7.7%	23.0%
Neutral/no impact	11.3%	36.5%	8.3%	13.3%
Negative	23.6%	4.0%	32.7%	18.3%
Very negative	45.8%	1.7%	39.7%	25.0%
Don't know/no opinion	1.0%	5.4%	5.3%	3.7%
Total	100.0%	100.0%	100.0%	100.0%
Not Answered	-	-	-	-

Source: Clean Air Zone Consultation 2019

Appendix 4.19: “If a Clean Air Zone was introduced what do you think would be the overall impact for the following?” (SME and Large Business Comparison)

"If a Clean Air Zone was introduced what do you think would be the overall impact for the following?" (SME and Large Business Comparison)				
SME Businesses	Your organisation/business	The Health of People in Sheffield	Businesses in Sheffield	Sheffield as a City
Very positive	6.7%	18.5%	6.0%	15.5%
Positive	8.8%	33.1%	7.4%	22.6%
Neutral/no impact	12.0%	36.7%	8.8%	14.1%
Negative	24.6%	4.3%	32.5%	18.7%
Very negative	46.8%	1.8%	40.3%	25.1%
Don't know/no opinion	1.1%	5.7%	4.9%	3.9%
Total	284	281	283	283
Large Businesses				
Very positive	18.8%	58.8%	12.5%	37.5%
Positive	50.0%	11.8%	12.5%	31.3%
Neutral/no impact	-	29.4%	-	-
Negative	6.3%	-	37.5%	6.3%
Very negative	25.0%	-	25.0%	25.0%
Don't know/no opinion	-	-	12.5%	-
Total	16	17	16	16

Source: Clean Air Zone Consultation 2019

Appendix 4.20: “If the proposed charges are introduced, how are you likely to respond? Please?”

If the proposed charges are introduced, how are you likely to respond? Please choose up to three answers, where '1' is most likely response, '2' is second most likely, etc.				
Response to the Charge	1 (Most likely)	2	3	(1+2+3)
Look to replace non-compliant vehicle(s) with a compliant one(s)	63	59	53	175
Just pay the charge	43	37	88	168
Increase prices to cover the charge	55	42	21	118
Relocate the business to outside the CAZ	40	38	21	99
Divert journeys around the CAZ	36	28	20	84
Reduce the number of journeys in the CAZ	20	33	18	71
Cease trading	23	17	26	66
Relocate the supply chain to outside the CAZ	7	10	9	26
Response to the Charge	1 (Most likely)	2	3	(1+2+3)
Look to replace non-compliant vehicle(s) with a compliant one(s)	21.6%	20.2%	18.2%	59.9%
Just pay the charge	14.7%	12.7%	30.1%	57.5%
Increase prices to cover the charge	18.8%	14.4%	7.2%	40.4%
Relocate the business to outside the CAZ	13.7%	13.0%	7.2%	33.9%
Divert journeys around the CAZ	12.3%	9.6%	6.8%	28.8%
Reduce the number of journeys in the CAZ	6.8%	11.3%	6.2%	24.3%
Cease trading	7.9%	5.8%	8.9%	22.6%
Relocate the supply chain to outside the CAZ	2.4%	3.4%	3.1%	8.9%

Source: Clean Air Zone Consultation 2019 (n = 292 responses)

Appendix 4.21: “If you were to upgrade your business vehicle(s) from non-compliant to compliant one(s), how are you most likely to finance this?”

If you were to upgrade your business vehicle(s) from non-compliant to compliant one(s), how are you most likely to finance this?		
Financing Option	Count	Percentage
Buy outright	56	21.4%
Lease agreement	50	19.1%
Bank finance	43	16.4%
Hire purchase	38	14.5%
Personal contract purchase	9	3.4%
Other (please state)	66	25.2%
Total	262	100.0%
Not Answered	45	-

Source: Clean Air Zone Consultation 2019 (n = 262 responses)

Appendix 4.22: “To what extent do you agree or disagree that there should be extra support for the following people or organisations?”

To what extent do you agree or disagree that there should be extra support for the following people or organisations?							
	Small and medium sized enterprises operating in the CAZ area	Larger businesses and organisations operating in the CAZ area	Businesses and organisations outside the CAZ area	Taxi operators	People living in or close to the CAZ area	People with limited income	Disabled people
Strongly agree	238	73	107	91	119	134	153
Agree	34	85	62	99	69	62	55
Neither agree nor disagree	9	59	54	45	54	45	33
Disagree	3	43	33	19	23	19	13
Strongly disagree	5	22	19	26	11	13	13
Don't know/no opinion	9	13	16	13	14	20	25
Total	298	295	291	293	290	293	292
Not Answered	9	12	16	14	17	14	15
	Small and medium sized enterprises operating in the CAZ area	Larger businesses and organisations operating in the CAZ area	Businesses and organisations outside the CAZ area	Taxi operators	People living in or close to the CAZ area	People with limited income	Disabled people
Strongly agree	79.9%	24.7%	36.8%	31.1%	41.0%	45.7%	52.4%
Agree	11.4%	28.8%	21.3%	33.8%	23.8%	21.2%	18.8%
Neither agree nor disagree	3.0%	20.0%	18.6%	15.4%	18.6%	15.4%	11.3%
Disagree	1.0%	14.6%	11.3%	6.5%	7.9%	6.5%	4.5%
Strongly disagree	1.7%	7.5%	6.5%	8.9%	3.8%	4.4%	4.5%
Don't know/no opinion	3.0%	4.4%	5.5%	4.4%	4.8%	6.8%	8.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Not Answered	-	-	-	-	-	-	-

Source: Clean Air Zone Consultation 2019

Appendix 4.23: “If a Clean Air Zone was introduced do you think your organisation would need extra support?”

If a Clean Air Zone was introduced do you think your organisation would need extra support?		
	Count	Percentage
Yes	206	68.4%
No	51	16.9%
Don't know	44	14.6%
Total	301	100.0%
Not Answered	6	-

Source: Clean Air Zone Consultation 2019 (n = 301 responses)

Appendix 4.24: “If a Clean Air Zone was introduced do you think your organisation would need extra support?”

To what extent would the proposed support packages help you to upgrade to a cleaner vehicle that would not be subject to the charge?					
	Grant towards upgrade to electric vans (LGVs) (eg. plug-in van grant)	Loan towards upgrade to compliant Euro 6 van	Loan towards upgrade to compliant electric van	Loan towards upgrade to gas or biomethane HGVs	Vouchers for free electric vehicle charging
To a great extent	113	98	82	39	60
To a moderate extent	35	24	26	11	26
To some extent	21	27	30	23	28
To a small extent	10	18	12	10	22
Not at all	44	48	57	58	60
Not relevant	53	59	64	126	72
Total	276	274	271	267	268
Not Answered	31	33	36	40	39
	Grant towards upgrade to electric vans (LGVs) (eg. plug-in van grant)	Loan towards upgrade to compliant Euro 6 van	Loan towards upgrade to compliant electric van	Loan towards upgrade to gas or biomethane HGVs	Vouchers for free electric vehicle charging
To a great extent	40.9%	35.8%	30.3%	14.6%	22.4%
To a moderate extent	12.7%	8.8%	9.6%	4.1%	9.7%
To some extent	7.6%	9.9%	11.1%	8.6%	10.4%
To a small extent	3.6%	6.6%	4.4%	3.7%	8.2%
Not at all	15.9%	17.5%	21.0%	21.7%	22.4%
Not relevant	19.2%	21.5%	23.6%	47.2%	26.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Not Answered	-	-	-	-	-

Source: Clean Air Zone Consultation 2019

Appendix 4.25: “Would you be interested in taking up the offer of a fleet review service?”

Would you be interested in taking up the offer of a fleet review service?		
	Count	Percentage
Yes	37	12.6%
No	187	63.8%
Not sure, but would like to know more	69	23.5%
Total	293	100.0%
Not Answered	14	-

Source: Clean Air Zone Consultation 2019 (n = 293 responses)

Appendix 4.26: “What other actions do you think Sheffield City Council should take to improve air quality in the city?”

What other actions do you think Sheffield City Council should take to improve air quality in the city?		
Actions	Count	Percentage
Work to improve clean public transport	214	72.3%
Take action to reduce congestion	187	63.2%
Encourage cycling	172	58.1%
Encourage walking	169	57.1%
Encourage low emission vehicles	166	56.1%
Discourage vehicle idling	157	53.0%
Lobby for electrification of rail network	137	46.3%
Charge private vehicles to drive in the CAZ	116	39.2%
More pedestrianisation	116	39.2%
Close roads around schools	91	30.7%
Implement traffic free days	69	23.3%
Other (please state)	50	16.9%
Total	296	100.0%
Not Answered	11	-

Source: Clean Air Zone Consultation 2019 (n = 296 responses)
Totals do not sum due to multiple responses.

Appendix 4.27: “If the Clean Air Zone does not improve air quality enough to meet legal limits, we may have to introduce charging for private cars. To what extent would you support such a move?”

If the Clean Air Zone does not improve air quality enough to meet legal limits, we may have to introduce charging for private cars. To what extent would you support such a move?		
	Count	Percentage
To a great extent	101	33.7%
To a moderate extent	39	13.0%
To some extent	35	11.7%
To a small extent	20	6.7%
Not at all	105	35.0%
Total	300	100.0%
Not answered	7	-

Source: Clean Air Zone Consultation 2019 (n = 300 responses)

Appendix 4.28: “Do you feel that the information provided has enabled you to make an informed comment on the proposals?”

Do you feel that the information provided has enabled you to make an informed comment on the proposals?		
	Count	Percentage
Yes	230	76.4%
No	39	13.0%
Don't know	32	10.6%
Total	301	100.0%
Not Answered	6	-

Source: Clean Air Zone Consultation 2019 (n = 301 responses)

Appendix 5: Disaggregated Analysis

Q9 Does the Clean Air Zone cover the right area?

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Total Disagree	N =
Number of Employees							
Micro (0-9)	6.1%	23.9%	17.8%	16.0%	35.5%	51.2%	211
Small (10-49)	12.7%	29.1%	18.2%	16.4%	23.6%	40.0%	55
Medium (50-249)	5.6%	16.7%	33.3%	22.2%	22.2%	44.4%	17
Large (250+)	11.1%	55.6%	5.6%	5.6%	16.7%	23.5%	18
Sector							
Accommodation & food	0.0%	44.4%	11.1%	11.1%	33.3%	44.4%	9
Agriculture, forestry & fishing	0.0%	25.0%	0.0%	25.0%	50.0%	75.0%	4
Arts & entertainment	15.4%	23.1%	23.1%	15.4%	23.1%	38.5%	13
Business admin & support	0.0%	50.0%	0.0%	50.0%	0.0%	50.0%	2
Construction	5.9%	15.7%	19.6%	17.6%	41.2%	58.8%	51
Education	9.1%	72.7%	0.0%	18.2%	0.0%	18.2%	11
Finance & insurance	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	1
Health	20.0%	40.0%	10.0%	20.0%	10.0%	30.0%	10
Information & comms	28.6%	14.3%	42.9%	0.0%	14.3%	14.3%	7
Mining & quarrying	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%	1
Motor trades	0.0%	0.0%	33.3%	16.7%	50.0%	66.7%	6
Production	0.0%	46.7%	13.3%	20.0%	20.0%	40.0%	15
Prof., scientific & technical	7.1%	50.0%	14.3%	0.0%	28.6%	28.6%	14
Property	0.0%	6.7%	40.0%	6.7%	46.7%	53.3%	15
Public admin and defence	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	3
Retail	7.7%	42.3%	19.2%	15.4%	15.4%	30.8%	26
Third sector/charity	16.7%	33.3%	25.0%	8.3%	16.7%	25.0%	12
Transport	8.5%	8.5%	27.7%	12.8%	42.6%	55.3%	47
Wholesale	0.0%	60.0%	0.0%	0.0%	40.0%	40.0%	5
Other	8.0%	20.0%	6.0%	28.0%	38.0%	66.0%	50

Source: Sheffield Clean Air Zone Consultation 2019 (n = 302 responses)

Appendix 5.1: Clean Air Zone Coverage

Appendix 5.2: Vehicles Included in the CAZ Charge

**Q13 Which types of vehicle do you think should be included in the Clean Air Zone restrictions?
(Should be Subject to the Charge)**

	Buses and Coaches	Lorries (HGVs)	Taxis and Private Hire Vehicles	Vans (LGVs) and Minibuses	Cars	Mopeds and Motorcycles
Number of Employees						
Micro (0-9)	69.6%	65.5%	61.7%	36.9%	45.6%	29.4%
Small (10-49)	80.8%	74.5%	72.5%	51.0%	45.1%	33.3%
Medium (50-249)	56.3%	72.2%	76.5%	58.8%	47.1%	35.3%
Large (250+)	82.4%	88.2%	76.5%	76.5%	31.3%	25.0%
Sector						
Accommodation & food	88.9%	77.8%	88.9%	44.4%	55.6%	37.5%
Agriculture, forestry & fishing	50.0%	50.0%	75.0%	50.0%	50.0%	25.0%
Arts & entertainment	61.5%	76.9%	61.5%	46.2%	38.5%	30.8%
Business admin & support	100.0%	100.0%	100.0%	50.0%	50.0%	50.0%
Construction	74.5%	66.7%	65.4%	25.0%	38.0%	18.4%
Education	72.7%	90.9%	81.8%	72.7%	63.6%	50.0%
Finance & insurance	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%
Health	88.9%	100.0%	88.9%	77.8%	44.4%	44.4%
Information & comms.	100.0%	100.0%	100.0%	42.9%	42.9%	42.9%
Mining & quarrying	100.0%	0.0%	100.0%	0.0%	0.0%	0.0%
Motor trades	80.0%	60.0%	80.0%	40.0%	20.0%	20.0%
Production	78.6%	92.9%	76.9%	66.7%	42.9%	28.6%
Prof., scientific & technical	85.7%	64.3%	71.4%	64.3%	42.9%	28.6%
Property	57.1%	64.3%	50.0%	28.6%	42.9%	28.6%
Public admin and defence	100.0%	100.0%	100.0%	100.0%	0.0%	0.0%
Retail	76.0%	76.0%	58.3%	48.0%	45.8%	42.9%
Third sector/charity	91.7%	91.7%	91.7%	75.0%	63.6%	54.5%
Transport	46.3%	48.9%	47.5%	25.6%	52.3%	19.5%
Wholesale	75.0%	25.0%	50.0%	0.0%	40.0%	40.0%
Other	68.0%	61.2%	55.1%	41.7%	41.7%	34.0%

Source: Sheffield Clean Air Zone Consultation 2019

Q16a Roughly what proportion of your current fleet would be charged to drive in the proposed Clean Air Zone?

	All	More than Three Quarters	Between a Half and Three Quarters	Between a Quarter and a Half	Less than a Quarter	None	N =
Number of Employees							
Micro (0-9)	57.2%	2.6%	10.3%	7.7%	7.7%	14.4%	194
Small (10-49)	22.4%	18.4%	8.2%	14.3%	14.3%	22.4%	49
Medium (50-249)	20.0%	46.7%	6.7%	13.3%	13.3%	13.3%	15
Large (250+)	13.3%	13.3%	33.3%	20.0%	0.0%	6.7%	15
Sector							
Accommodation & food	77.8%	0.0%	0.0%	22.2%	0.0%	0.0%	9
Agriculture, forestry & fishing	75.0%	0.0%	0.0%	0.0%	25.0%	0.0%	4
Arts & entertainment	63.6%	0.0%	9.1%	18.2%	9.1%	0.0%	11
Business admin & support	-	-	-	-	-	-	0
Construction	52.0%	8.0%	14.0%	8.0%	8.0%	10.0%	50
Education	0.0%	0.0%	42.9%	0.0%	14.3%	42.9%	7
Finance & insurance	-	-	-	-	-	-	0
Health	14.3%	14.3%	14.3%	42.9%	0.0%	14.3%	7
Information & comms.	40.0%	0.0%	0.0%	20.0%	20.0%	20.0%	5
Mining & quarrying	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1
Motor trades	50.0%	0.0%	0.0%	0.0%	16.7%	33.3%	6
Production	57.1%	0.0%	7.1%	7.1%	14.3%	14.3%	14
Prof., scientific & technical	15.4%	7.7%	7.7%	7.7%	7.7%	53.8%	13
Property	73.3%	0.0%	0.0%	13.3%	0.0%	13.3%	15
Public admin and defence	0.0%	0.0%	33.3%	33.3%	33.3%	0.0%	3
Retail	45.8%	0.0%	8.3%	12.5%	12.5%	20.8%	24
Third sector/charity	40.0%	10.0%	10.0%	0.0%	10.0%	30.0%	10
Transport	48.9%	17.8%	15.6%	4.4%	4.4%	8.9%	45
Wholesale	40.0%	20.0%	0.0%	0.0%	40.0%	0.0%	5
Other	40.0%	15.6%	11.1%	11.1%	6.7%	15.6%	45

Source: Sheffield Clean Air Zone Consultation 2019 (n = 274 responses)

Appendix 5.3: Current Fleet Affected

Appendix 5.4: Level of Charge

Q18 What do you think about the proposed level of charge for different non-compliant vehicles? (Too High)

	Buses and Coaches	Lorries (HGVs)	Hackney Taxis	Private Hire Vehicles	Vans (LGVs) and Minibuses
Number of Employees					
Micro (0-9)	51.5%	49.0%	34.0%	36.9%	63.8%
Small (10-49)	37.7%	46.2%	30.2%	28.3%	51.9%
Medium (50-249)	47.1%	27.8%	23.5%	23.5%	35.3%
Large (250+)	31.3%	29.4%	18.8%	12.5%	29.4%
Sector					
Accommodation & food	11.1%	22.2%	22.2%	22.2%	55.6%
Agriculture, forestry & fishing	75.0%	75.0%	50.0%	50.0%	75.0%
Arts & entertainment	46.2%	15.4%	15.4%	15.4%	38.5%
Business admin & support	0.0%	0.0%	0.0%	0.0%	50.0%
Construction	47.1%	52.9%	31.4%	32.0%	80.0%
Education	36.4%	18.2%	18.2%	18.2%	27.3%
Finance & insurance	0.0%	0.0%	0.0%	0.0%	0.0%
Health	20.0%	11.1%	10.0%	20.0%	40.0%
Information & comms.	14.3%	14.3%	0.0%	0.0%	57.1%
Mining & quarrying	100.0%	100.0%	100.0%	100.0%	100.0%
Motor trades	16.7%	16.7%	0.0%	0.0%	33.3%
Production	42.9%	28.6%	28.6%	28.6%	40.0%
Prof., scientific & technical	28.6%	28.6%	28.6%	28.6%	35.7%
Property	61.5%	53.8%	46.2%	53.8%	73.3%
Public admin and defence	66.7%	66.7%	0.0%	0.0%	0.0%
Retail	48.0%	46.2%	26.9%	38.5%	57.7%
Third sector/charity	0.0%	0.0%	0.0%	0.0%	16.7%
Transport	79.5%	68.9%	47.6%	46.5%	63.0%
Wholesale	60.0%	60.0%	50.0%	50.0%	80.0%
Other	56.3%	66.0%	47.9%	45.8%	69.4%

Source: Sheffield Clean Air Zone Consultation 2019

Appendix 5.5: Exemptions

Q19 Do you agree or disagree that the following vehicles or circumstances should be exempted at this stage? (Agree)

	Fairground / Fun Fair Vehicles	Vintage Buses (Non-Commercial)	School Buses	Where There is No Compliant Car on the Market	Entering the Zone due to Road Diversions
Number of Employees					
Micro (0-9)	29.5%	50.0%	48.8%	57.7%	84.2%
Small (10-49)	22.6%	59.6%	35.8%	65.4%	90.6%
Medium (50-249)	16.7%	55.6%	33.3%	66.7%	77.8%
Large (250+)	6.3%	50.0%	18.8%	76.5%	94.1%
Sector					
Accommodation & food	33.3%	55.6%	44.4%	55.6%	88.9%
Agriculture, forestry & fishing	25.0%	50.0%	75.0%	75.0%	75.0%
Arts & entertainment	46.2%	46.2%	83.3%	69.2%	84.6%
Business admin & support	50.0%	100.0%	0.0%	50.0%	100.0%
Construction	21.2%	40.4%	45.1%	60.8%	84.6%
Education	18.2%	54.5%	27.3%	81.8%	90.9%
Finance & insurance	100.0%	100.0%	0.0%	100.0%	100.0%
Health	22.2%	66.7%	33.3%	66.7%	88.9%
Information & comms.	42.9%	57.1%	28.6%	85.7%	100.0%
Mining & quarrying	0.0%	0.0%	100.0%	0.0%	100.0%
Motor trades	16.7%	66.7%	50.0%	83.3%	100.0%
Production	6.7%	46.7%	33.3%	53.3%	93.3%
Prof., scientific & technical	28.6%	57.1%	21.4%	64.3%	85.7%
Property	35.7%	50.0%	35.7%	50.0%	92.9%
Public admin and defence	0.0%	66.7%	0.0%	100.0%	100.0%
Retail	37.5%	54.2%	60.0%	52.0%	80.0%
Third sector/charity	36.4%	36.4%	27.3%	36.4%	54.5%
Transport	28.9%	64.4%	58.7%	66.7%	89.1%
Wholesale	60.0%	60.0%	80.0%	60.0%	100.0%
Other	14.3%	46.9%	30.6%	54.0%	80.0%

Source: Sheffield Clean Air Zone Consultation 2019

Appendix 5.6: Impact of Proposals

Q21 If a Clean Air Zone was introduced what do you think would be the overall impact for the following? (Very Positive and Positive)				
	Your Organisation/ Business	The Health of People in Sheffield	Businesses in Sheffield	Sheffield as a City
Number of Employees				
Micro (0-9)	12.7%	47.4%	12.8%	35.4%
Small (10-49)	24.1%	61.5%	16.7%	41.5%
Medium (50-249)	22.2%	72.2%	11.1%	61.1%
Large (250+)	68.8%	70.6%	25.0%	68.8%
Sector				
Accommodation & food	22.2%	66.7%	22.2%	44.4%
Agriculture, forestry & fishing	0.0%	25.0%	0.0%	25.0%
Arts & entertainment	7.7%	61.5%	7.7%	46.2%
Business admin & support	50.0%	100.0%	50.0%	50.0%
Construction	3.8%	38.5%	7.7%	23.1%
Education	54.5%	81.8%	27.3%	90.9%
Finance & insurance	100.0%	100.0%	100.0%	100.0%
Health	60.0%	88.9%	40.0%	77.8%
Information & comms.	42.9%	100.0%	28.6%	71.4%
Mining & quarrying	0.0%	0.0%	0.0%	0.0%
Motor trades	16.7%	50.0%	0.0%	33.3%
Production	0.0%	73.3%	0.0%	46.7%
Prof., scientific & technical	35.7%	64.3%	42.9%	50.0%
Property	6.7%	40.0%	0.0%	20.0%
Public admin and defence	100.0%	100.0%	33.3%	66.7%
Retail	26.9%	61.5%	19.2%	50.0%
Third sector/charity	50.0%	91.7%	41.7%	91.7%
Transport	6.5%	26.7%	8.9%	30.4%
Wholesale	0.0%	20.0%	0.0%	20.0%
Other	14.3%	46.9%	6.1%	24.5%

Source: Sheffield Clean Air Zone Consultation 2019

Appendix 5.7: Response of Proposals

Q23 If the proposed charges are introduced, how are you likely to respond? (Most Likely)								
	Just pay the charge	Look to replace non-compliant vehicle(s) with a compliant one(s)	Relocate the business to outside the CAZ	Relocate the supply chain to outside the CAZ	Increase prices to cover the charge	Reduce the number of journeys in the CAZ	Divert journeys around the CAZ	Cease trading
Number of Employees								
Micro (0-9)	30.2%	30.4%	40.5%	29.4%	43.9%	30.0%	44.3%	34.5%
Small (10-49)	20.0%	42.4%	36.8%	12.5%	52.4%	20.0%	56.3%	33.3%
Medium (50-249)	22.2%	54.5%	0.0%	100.0%	41.7%	0.0%	-	50.0%
Large (250+)	0.0%	50.0%	75.0%	-	100.0%	37.5%	-	-
Sector								
Accommodation & food	14.3%	75.0%	33.3%	-	50.0%	-	0.0%	20.0%
Agriculture, forestry & fishing	33.3%	33.3%	100.0%	-	50.0%	0.0%	0.0%	-
Arts & entertainment	20.0%	42.9%	0.0%	-	33.3%	50.0%	66.7%	0.0%
Business admin & support	0.0%	100.0%	0.0%	-	-	0.0%	100.0%	-
Construction	38.5%	29.0%	35.0%	25.0%	41.7%	12.5%	45.5%	25.0%
Education	0.0%	57.1%	50.0%	-	50.0%	40.0%	25.0%	-
Finance & insurance	0.0%	-	-	-	-	100.0%	0.0%	-
Health	20.0%	100.0%	0.0%	50.0%	33.3%	0.0%	50.0%	0.0%
Information & comms.	25.0%	66.7%	0.0%	-	50.0%	0.0%	100.0%	-
Mining & quarrying	100.0%	0.0%	0.0%	-	-	-	-	-
Motor trades	33.3%	33.3%	100.0%	0.0%	33.3%	-	50.0%	0.0%
Production	55.6%	20.0%	14.3%	0.0%	25.0%	50.0%	57.1%	0.0%
Prof., scientific & technical	16.7%	55.6%	42.9%	50.0%	33.3%	0.0%	50.0%	0.0%
Property	33.3%	14.3%	66.7%	0.0%	57.1%	25.0%	20.0%	66.7%
Public admin and defence	0.0%	100.0%	-	-	-	0.0%	-	-
Retail	35.7%	35.3%	10.0%	20.0%	41.7%	20.0%	50.0%	83.3%
Third sector/charity	40.0%	50.0%	0.0%	0.0%	0.0%	50.0%	50.0%	100.0%
Transport	26.9%	12.0%	76.9%	50.0%	62.5%	20.0%	20.0%	31.6%
Wholesale	33.3%	0.0%	100.0%	100.0%	0.0%	-	0.0%	50.0%
Other	7.1%	36.7%	58.3%	0.0%	47.6%	40.0%	43.8%	40.0%

Source: Sheffield Clean Air Zone Consultation 2019

Appendix 5.8: Extra Support to Organisations

Q25 To what extent do you agree or disagree that there should be extra support for the following people or organisations? (Strongly Agree and Agree)

	SMEs Operating in the CAZ area	Larger Businesses Operating in the Clean Air Zone	Businesses Outside the Clean Air Zone	Taxi Operators	People Living in or Close to the Clean Air Zone	People with Limited Income	Disabled People
Number of Employees							
Micro (0-9)	91.8%	52.4%	59.1%	64.9%	65.8%	69.9%	69.3%
Small (10-49)	92.6%	57.4%	66.0%	70.4%	66.7%	64.2%	75.5%
Medium (50-249)	83.3%	52.9%	47.1%	52.9%	52.9%	47.1%	70.6%
Large (250+)	88.2%	58.8%	29.4%	62.5%	56.3%	56.3%	81.3%
Sector							
Accommodation & food	100.0%	44.4%	66.7%	55.6%	55.6%	66.7%	66.7%
Agriculture, forestry & fishing	75.0%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%
Arts & entertainment	76.9%	30.8%	30.8%	69.2%	61.5%	61.5%	69.2%
Business admin & support	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%
Construction	96.1%	56.9%	75.5%	59.2%	60.4%	76.0%	69.4%
Education	72.7%	54.5%	40.0%	60.0%	70.0%	54.5%	70.0%
Finance & insurance	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Health	90.0%	40.0%	50.0%	70.0%	60.0%	60.0%	90.0%
Information & comms.	85.7%	14.3%	28.6%	57.1%	71.4%	85.7%	85.7%
Mining & quarrying	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Motor trades	100.0%	50.0%	83.3%	66.7%	83.3%	66.7%	100.0%
Production	85.7%	42.9%	71.4%	78.6%	64.3%	71.4%	71.4%
Prof., scientific & technical	92.9%	85.7%	64.3%	64.3%	57.1%	57.1%	64.3%
Property	93.3%	73.3%	50.0%	60.0%	66.7%	60.0%	66.7%
Public admin and defence	100.0%	66.7%	33.3%	100.0%	66.7%	100.0%	100.0%
Retail	96.2%	46.2%	38.5%	73.1%	84.0%	84.6%	84.6%
Third sector/charity	90.9%	0.0%	36.4%	54.5%	63.6%	81.8%	81.8%
Transport	86.7%	61.4%	62.2%	69.6%	62.2%	52.3%	60.0%
Wholesale	100.0%	40.0%	60.0%	80.0%	60.0%	100.0%	100.0%
Other	94.0%	65.3%	64.6%	62.5%	66.7%	62.5%	64.6%

Source: Sheffield Clean Air Zone Consultation 2019

Appendix 5.9: Extra Support to Upgrade Vehicles

Q29 To what extent would the proposed support packages help you to upgrade to a cleaner vehicle that would not be subject to the charge? (To A Great and Moderate Extent)

	Grant towards upgrade to electric vans (LGVs)	Loan towards upgrade to compliant Euro 6 van	Loan towards upgrade to compliant electric van	Loan towards upgrade to gas or biomethane HGVs	Vouchers for free electric vehicle charging
Number of Employees					
Micro (0-9)	55.4%	47.2%	40.6%	20.1%	32.5%
Small (10-49)	43.8%	41.7%	37.5%	14.9%	32.6%
Medium (50-249)	60.0%	20.0%	40.0%	13.3%	26.7%
Large (250+)	58.8%	40.0%	40.0%	13.3%	33.3%
Sector					
Accommodation & food	55.6%	55.6%	44.4%	37.5%	37.5%
Agriculture, forestry & fishing	75.0%	33.3%	33.3%	33.3%	33.3%
Arts & entertainment	36.4%	30.0%	45.5%	10.0%	36.4%
Business admin & support	100.0%	50.0%	50.0%	50.0%	50.0%
Construction	62.0%	67.3%	46.9%	21.3%	32.7%
Education	30.0%	10.0%	20.0%	0.0%	30.0%
Finance & insurance	0.0%	0.0%	0.0%	0.0%	0.0%
Health	55.6%	37.5%	50.0%	12.5%	33.3%
Information & comms.	50.0%	16.7%	16.7%	0.0%	42.9%
Mining & quarrying	-	-	-	-	-
Motor trades	60.0%	50.0%	40.0%	20.0%	0.0%
Production	69.2%	61.5%	64.3%	21.4%	30.8%
Prof., scientific & technical	35.7%	21.4%	28.6%	0.0%	21.4%
Property	57.1%	28.6%	23.1%	7.7%	15.4%
Public admin and defence	66.7%	66.7%	33.3%	33.3%	66.7%
Retail	54.2%	41.7%	40.0%	13.0%	36.0%
Third sector/charity	40.0%	10.0%	20.0%	10.0%	30.0%
Transport	42.9%	48.8%	35.0%	28.6%	26.3%
Wholesale	75.0%	50.0%	50.0%	50.0%	75.0%
Other	60.0%	44.4%	45.5%	20.5%	37.2%

Source: Sheffield Clean Air Zone Consultation 2019

Appendix 5.10: Charging Private Cars

Q32 If the Clean Air Zone does not improve air quality enough to meet legal limits, we may have to introduce charging for private cars. To what extent would you support such a move?

	To A Great Extent	To A Moderate Extent	To Some Extent	To A Small Extent	Not At All	N =
Number of Employees						
Micro (0-9)	36.3%	10.8%	10.8%	6.1%	35.8%	212
Small (10-49)	27.8%	18.5%	13.0%	5.6%	35.2%	54
Medium (50-249)	29.4%	17.6%	11.8%	23.5%	17.6%	17
Large (250+)	25.0%	18.8%	18.8%	0.0%	37.5%	16
Sector						
Accommodation & food	55.6%	11.1%	0.0%	11.1%	22.2%	9
Agriculture, forestry & fishing	50.0%	0.0%	0.0%	25.0%	25.0%	4
Arts & entertainment	41.7%	16.7%	25.0%	0.0%	16.7%	12
Business admin & support	50.0%	0.0%	50.0%	0.0%	0.0%	2
Construction	25.0%	17.3%	15.4%	1.9%	40.4%	52
Education	30.0%	20.0%	20.0%	0.0%	30.0%	10
Finance & insurance	100.0%	0.0%	0.0%	0.0%	0.0%	1
Health	30.0%	30.0%	10.0%	10.0%	20.0%	10
Information & comms.	28.6%	14.3%	14.3%	0.0%	42.9%	7
Mining & quarrying	0.0%	0.0%	0.0%	100.0%	0.0%	1
Motor trades	0.0%	0.0%	0.0%	16.7%	83.3%	6
Production	26.7%	13.3%	6.7%	26.7%	26.7%	15
Prof., scientific & technical	42.9%	14.3%	7.1%	7.1%	28.6%	14
Property	20.0%	0.0%	6.7%	13.3%	60.0%	15
Public admin and defence	0.0%	33.3%	33.3%	0.0%	33.3%	3
Retail	30.8%	19.2%	7.7%	3.8%	38.5%	26
Third sector/charity	75.0%	0.0%	16.7%	8.3%	0.0%	12
Transport	38.3%	12.8%	10.6%	6.4%	31.9%	47
Wholesale	40.0%	0.0%	20.0%	0.0%	40.0%	5
Other	32.7%	10.2%	10.2%	4.1%	42.9%	49

Source: Sheffield Clean Air Zone Consultation 2019 (n = 300 responses)