



***Perspectives about the Clean Air Zone:  
Sole traders and micro businesses which own vans***

A report for Transport for Greater Manchester  
13<sup>th</sup> November 2019

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# Summary of responses to funding

# Summary of findings

The respondents were owners or financial decision makers of businesses with vans. A business owned could be interviewed if fewer than 10 people were employed by the business, including the owner. 800 interviews were completed on the telephone.

The number of vans owned by businesses and by industry sector were established and of these vans the registration and fuel type were collected to establish if a van would be compliant based on the current criteria for the Clean Air Zone.

On average, businesses interviewed by telephone owned 1.57 vans and 83% of businesses had at least one non-compliant van based on the proposed Clean Air Zone.

150 interviews were completed face-to-face. All businesses had at least one van which would not be compliant if the Clean Air Zone was introduced at the time of the interview. The vans have been owned for an average of just over 4 years and the approximate average age of the vans is 9½ years.

52% of businesses would usually require finance when purchasing a van which is new to them.

# Summary of findings: Financing vans

**By 2021:** Before any offer of finance, 49% of the 150 businesses would have upgraded all of their vans to be compliant. 37% of these would have naturally upgraded due to time and a further 12% would have changed because of the introduction of the Clean Air Zone.

**By 2023:** 63% of businesses would have upgraded to a newer compliant van before any offer of finance.

**In 2021:** The cost of changing to a newer van, as provided by businesses, would be £12,375. This equates to borrowing £9,281 per van. A 3 month contribution to businesses would cost £742 per van.

The proportions of businesses that would take finance and change to a newer, compliant van is shown in the next table, as well as the proportion of businesses that would accept a grant to change to a newer, compliant van and the level of grant required.

# Summary: All respondents

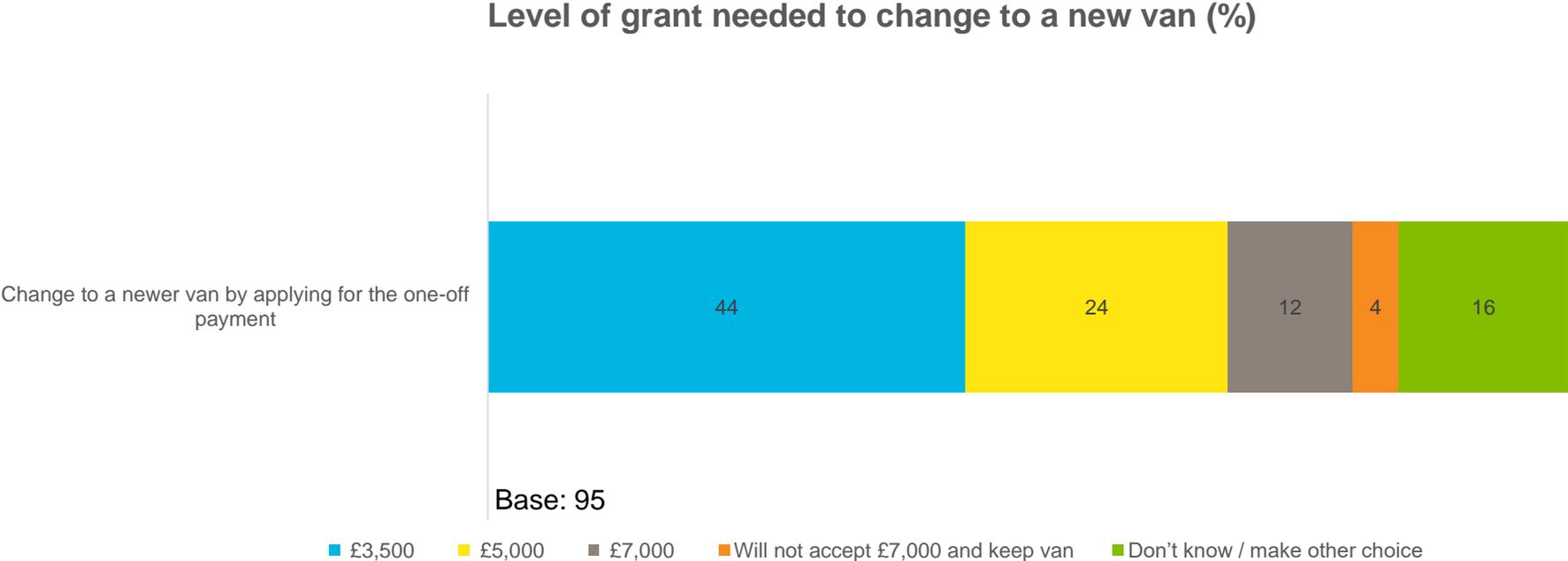
This table summarises how businesses reacted to the proposed funding.

Topic	Base	Number	Percent
Total interviews	150	150	100%
Willing to change to a compliant van by 2021 due to time and introduction of the Clean Air Zone without funding	150	55	37%
Willing to change to a compliant van by 2023 due to time and introduction of the Clean Air Zone without funding	150	77	51%
Willing to change to a compliant van using a financial package in 2021 (without the offer of a grant)	95	27	28%
Willing to change to a compliant van with a £3,500 grant	95	42	44%
Willing to change to a compliant van with a £5,000 grant*	95	65	68%
Willing to change to a compliant van with a £7,000 grant*	95	76	80%

\* Assumes all those who accepted a lower grant would accept the higher amount

# Summary of findings: What grant would be acceptable?

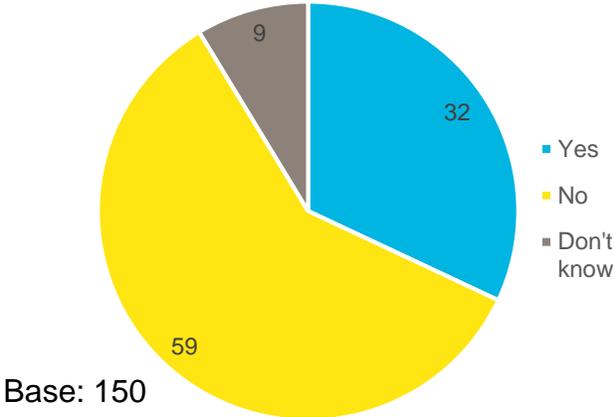
44% of respondents would change their van if offered the £3,500 grant and this would increase to 80% of respondents if the grant was increased to £7,000.



# Summary by sector: Views on Electric Vans

Businesses were asked if they would consider an electric van. Of those that would not, the main reasons were cost (initial and replacement batteries), charging infrastructure and mileage range.

Would consider an electric van (%)



Those who were interested in an electric van were given an opportunity to advise the amount of grant they would need to enable them to purchase. The average figures are shown below:

	Small Van	Mercedes Vito	Large panel van
<b>Advised cost of electric van</b>	£ 24,000	£ 40,000	£ 60,000
<b>Lowest quoted grant needed</b>	£ 2,000	£ 5,000	£ 12,000
<b>Highest quoted grant needed</b>	£ 20,000	£ 36,000	£ 40,000
<b>Average grant needed</b>	£ 11,426	£ 22,000	£ 27,455
<b>% of cost</b>	48%	55%	46%

# Introduction

## Background

TfGM wants to understand the impact of proposed Clean Air Zone charges on sole traders and micro businesses based in Greater Manchester.

The research was carried out in two stages:

1. An initial telephone interview to businesses to measure the proportion of businesses with non-compliant vans by industry sector.
2. A 20 minute face-to-face interview with businesses that had non-compliant vans to understand the actions they will take and their response to financial incentives to change to a newer van.

Telephone interviews took place in September / October 2019.  
Face-to-face interviews took place in October 2019.

A description of the methodology is shown in Appendix A.

# Introduction

## Objectives

To establish:

- Whether current owners of non-compliant vans will have upgraded to compliant vans by 2021 and 2023, prior to any financial support offered.
- Respondents' currently method of financing the purchase of a van.
- Respondents' reaction to the offer of a finance package.
- Respondents' reaction to the offer of a grant.

## Sample

- Respondents were either sole traders or business owners with fewer than 10 employees. The business needed to own at least one van.
- 800 business owners based in Greater Manchester were interviewed by telephone.
- 150 business owners were interviewed face-to-face. These business were required to have at least one non-compliant van.
- Some businesses that completed the face-to-face interview were sourced from the initial telephone survey, others were sourced directly.

# Introduction

## Interview length and topics

The telephone interview took 5 minutes to complete and recorded:

- Business size and sector;
- The number of vans by age and fuel type, per business;
- The regularity that businesses change their vans;
- The distance travelled by vans in Greater Manchester; and
- The number of times per month a van is used in Greater Manchester.

The face-to-face interview took 20 minutes to complete and recorded:

- Reported behavioural change when the Clean Air Zone would be introduced;
- The potential action taken should there be a finance package available to them;
- The potential action taken should there be a grant available to them; and
- Views on changing to electric vans.

## Compliance with the Clean Air Zone

- Vans were deemed not compliant if they were registered before September 2016.
- A business was deemed not compliant if at least one of the vans they owned was registered before September 2016.

# Telephone interviews: Findings

# Van ownership and compliance

The 800 businesses owned 1255 vans, an average of 1.57 vans per business. Of the 1255 vans, 965 of the vans are not compliant (77%).

98% of businesses owned at least one diesel van and 3% at least one petrol van.

The number of vans per business is shown in the table below.

Number of vans owned by a business	
Count	%
1	71
2	17
3	6
4	4
5	1
6+	2

17% of businesses already have all vans compliant

74% of businesses do not currently have any compliant vans.

9% of businesses have at least one compliant van, but not all vans are compliant.

# Incidence of businesses owning at least one van

Using a sample database, the business size and industry sector were already known and could be included as a measure even if the business did not own a van. Using this measure, the proportion of businesses that own a van by business size and industry sector were calculated and are shown in the table below. Only industry sectors with over 100 contacts are shown. A detailed split by business size for each sector is provided in Appendix C.

## Incidence by sector

Industry sector	Contacts	% owning or leasing at least one van
All sample	2165	27%
Construction	144	66%
Manufacturing	216	35%
Wholesale, retail & repair of motor vehicles	779	23%
Transport & storage	106	20%
Other services	186	13%
Administrative & support services	145	12%
Accommodation & food services	196	3%
Real estate activities	114	3%
All other sectors: Total*	279	30%

## Incidence by business size

Business Size	Contacts	% owning or leasing at least one van
Sole trader	1145	24%
Micro business	1020	30%

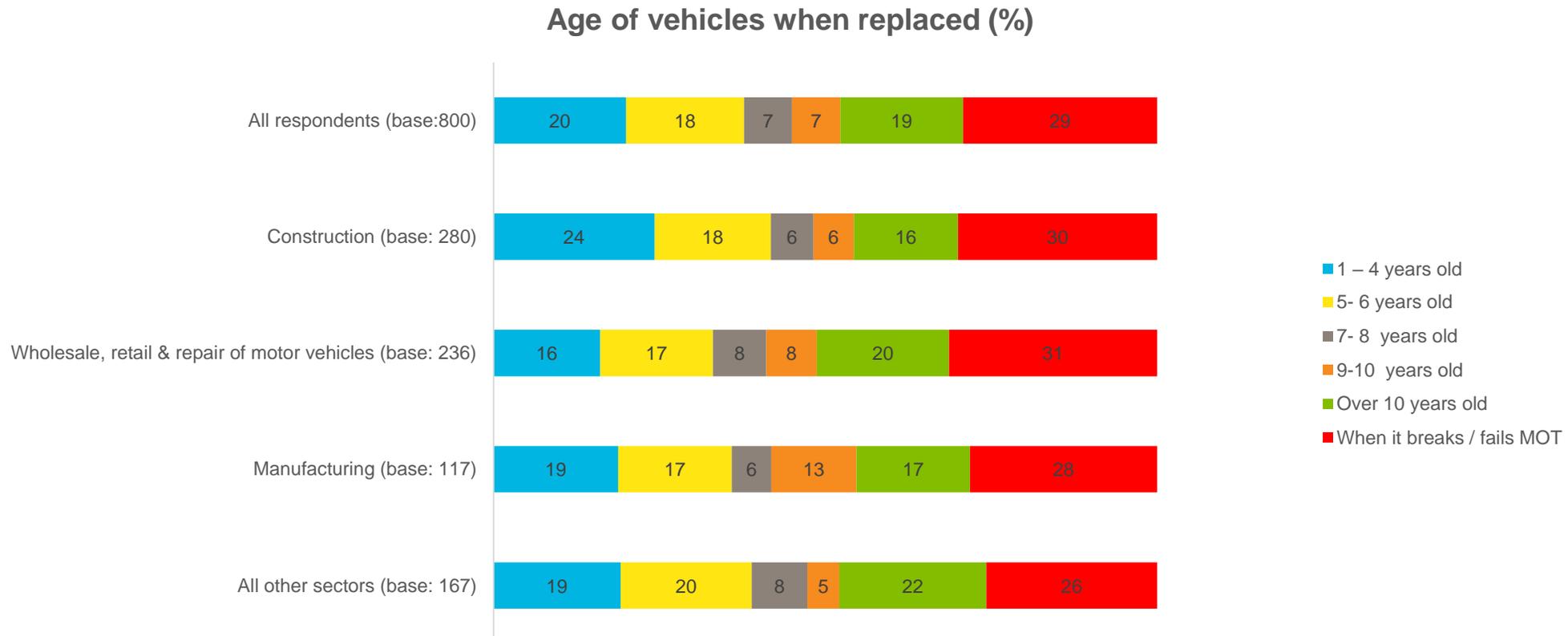
\*Some sectors had fewer than 100 contacts. These sectors have been combined but are separated in Appendix C

The sampling process focused on industry sectors which were more likely to own vans, therefore it is unlikely that this is statistically representative of Greater Manchester.

# Age of vehicle when replaced, by sector

20% of businesses replace vehicles before vans are 4 years old and 48% of businesses replace vehicles when they're over 10 years old or when they're no longer fit for purpose. There is no significant difference between industry sectors.

The sectors which received more than 100 interviews are shown in the chart below.



# Average mileage per van, per day

Respondents reported that each van covered an average\* of 36 miles per day. This was based on 1193 vans covering 43,205 miles, with 42 respondents owning 62 vans unable to estimate mileage.

The average mileage driven in vans by industry sectors is very similar and the sectors which received more than 100 interviews are split out in the table below:

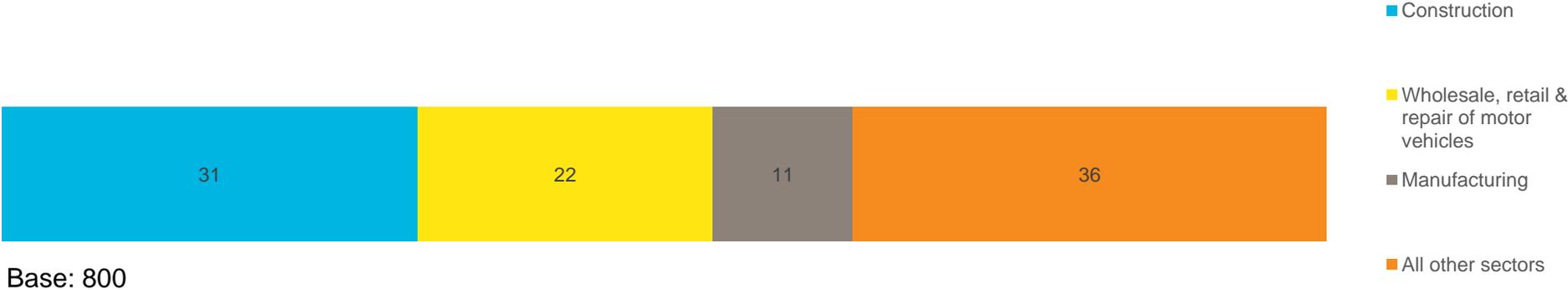
Industry sector	Average mileage per van, per day
Construction	37
Wholesale, retail & repair of motor vehicles	34
Manufacturing	34
All other sectors	40

\*The average was provided per business, not by van and the calculations are based on the mid-point of values from the questionnaire. Those stating they travelled over 50 miles per day were given a value of 75 miles per day.

# Number of trips made

Businesses make 6087 trips per week in the 1255 vans, an average of 4.85 trips per week\*.

Proportion of trips made by industry sector (%)



\*The number of trips per week has been calculated using the numbers shown in the table below, multiplied by the number of vans per business

Trips per week	Attributed number for calculations
More than 5 times per week	6
Four / five times per week	4.5
Two or three times per week	2.5
Once a week	1
Once a fortnight	0.5
Once a month	0.25
I travel in to GM less than once a month	0.1

# Face to face interviews with non-compliant van owners: Findings

# Sample information

64% of businesses interviewed were sole traders and the remainder were micro businesses.

The details of up to 3 vans were recorded. Where businesses owned more than 3 vans, the oldest 3 vans were recorded.

Nearly all vans are owned by the respondents, three businesses lease their vans and one business has financed through hire purchase.

Vans have been owned for an average of 4 years, 2 months and the approximate average age of the vans was 9 years, 6 months.

19 businesses (14%) are still making monthly payments on their vans, ranging from £130 to £525 per month and averaging £254 per van.

Face to face interviews with non-compliant van owners:  
Financing the cost of a new van

# Priorities when purchasing a van

The 150 business owners that own at least one non-compliant van were all asked for their 3 most important criteria when purchasing their next van. 28% of respondents selected the same three criteria listed below and 50% of respondents selected at least two of these.

- Suitability for the job (Selected by 78% of respondents)
- Initial cost (Selected by 67% of respondents)
- Running cost (Selected by 60% of respondents)

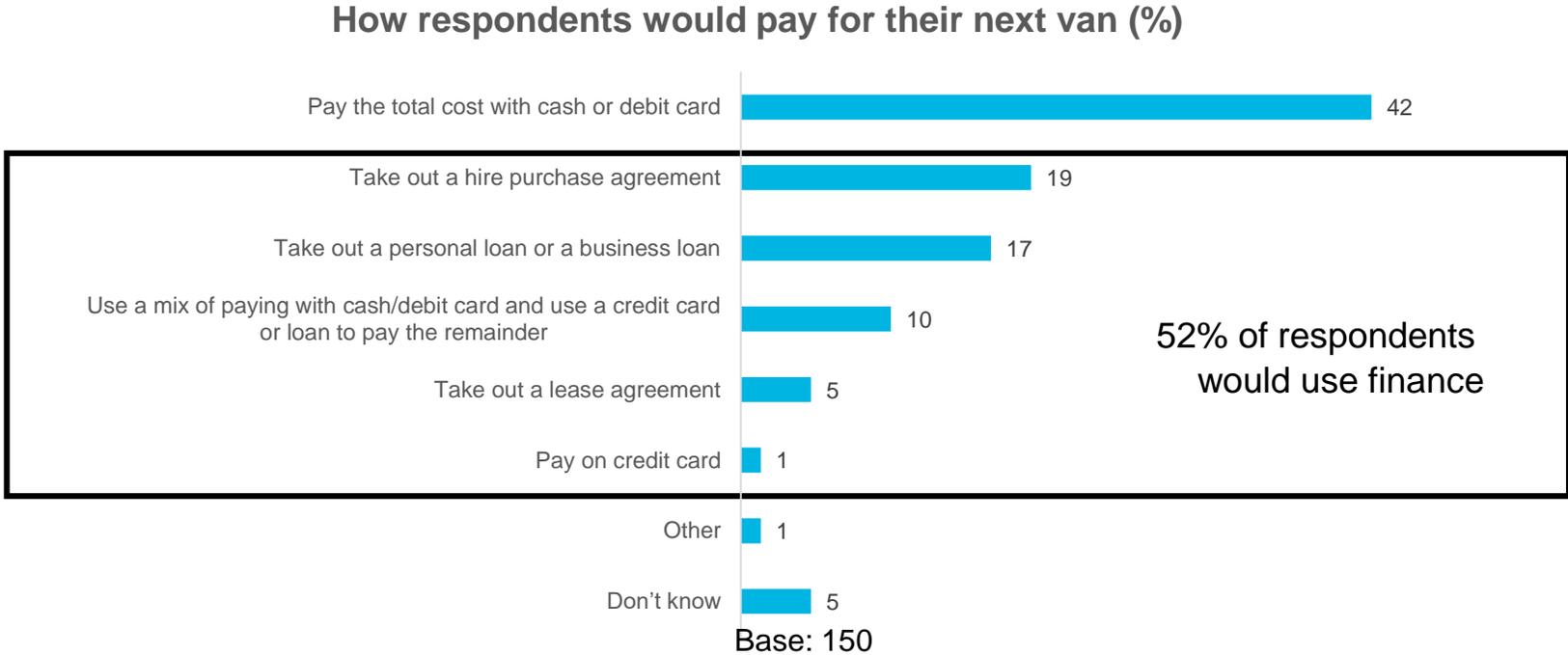
The two suggested criteria selected by the fewest respondents when deciding the level of importance were:

- Good for the environment (Selected by 7% of respondents)
- Availability of finance (Selected by 7% of respondents)

Respondents were then asked whether there was any other criteria which was not on the list which provided which would be more important than one selected and four respondents mentioned reliability of the van.

# Financing the cost of a new van

66% of respondents stated they would usually use their current van in part-exchange when they purchased a newer van. A little over half would use a form of finance as shown in the chart below.

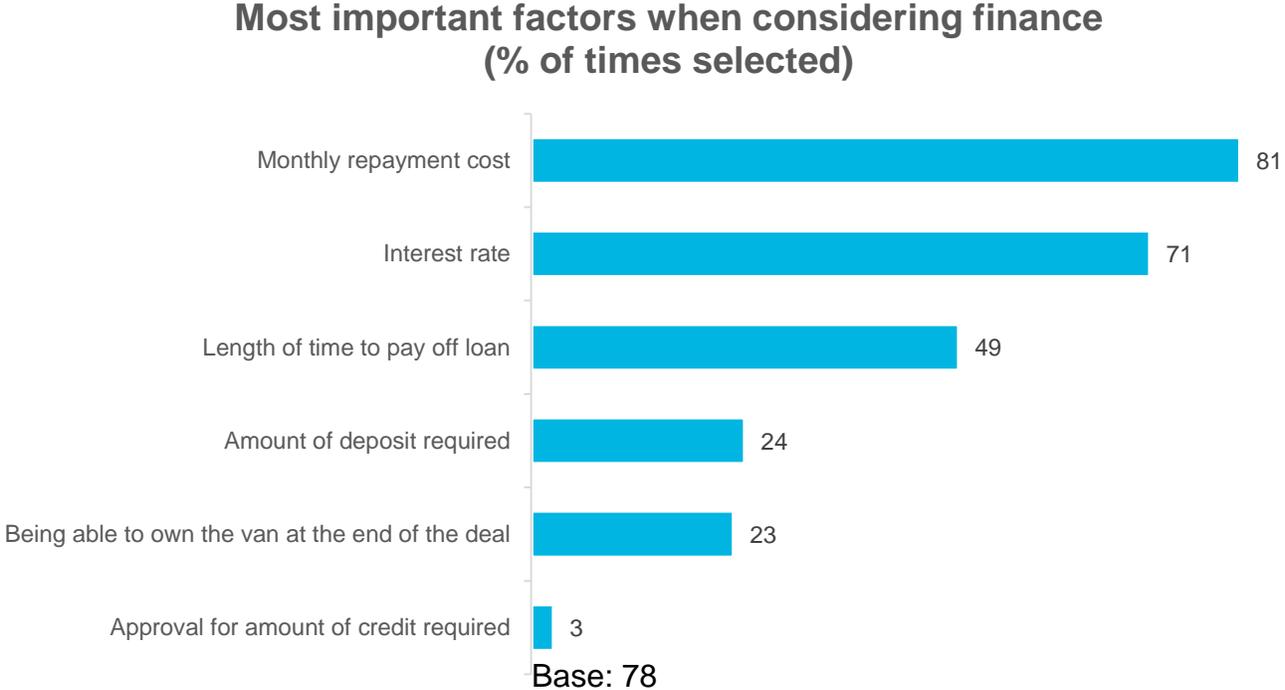


Of the 78 businesses who would access credit the main methods used would be:

- Hire Purchase (37% of those who would access credit)
- Taking out a loan (32% of those who would access credit)

# Priorities when accessing credit

Respondents were asked to give the most important factors when they were choosing finance for their van, up to a maximum of three factors. The responses provided are shown below:

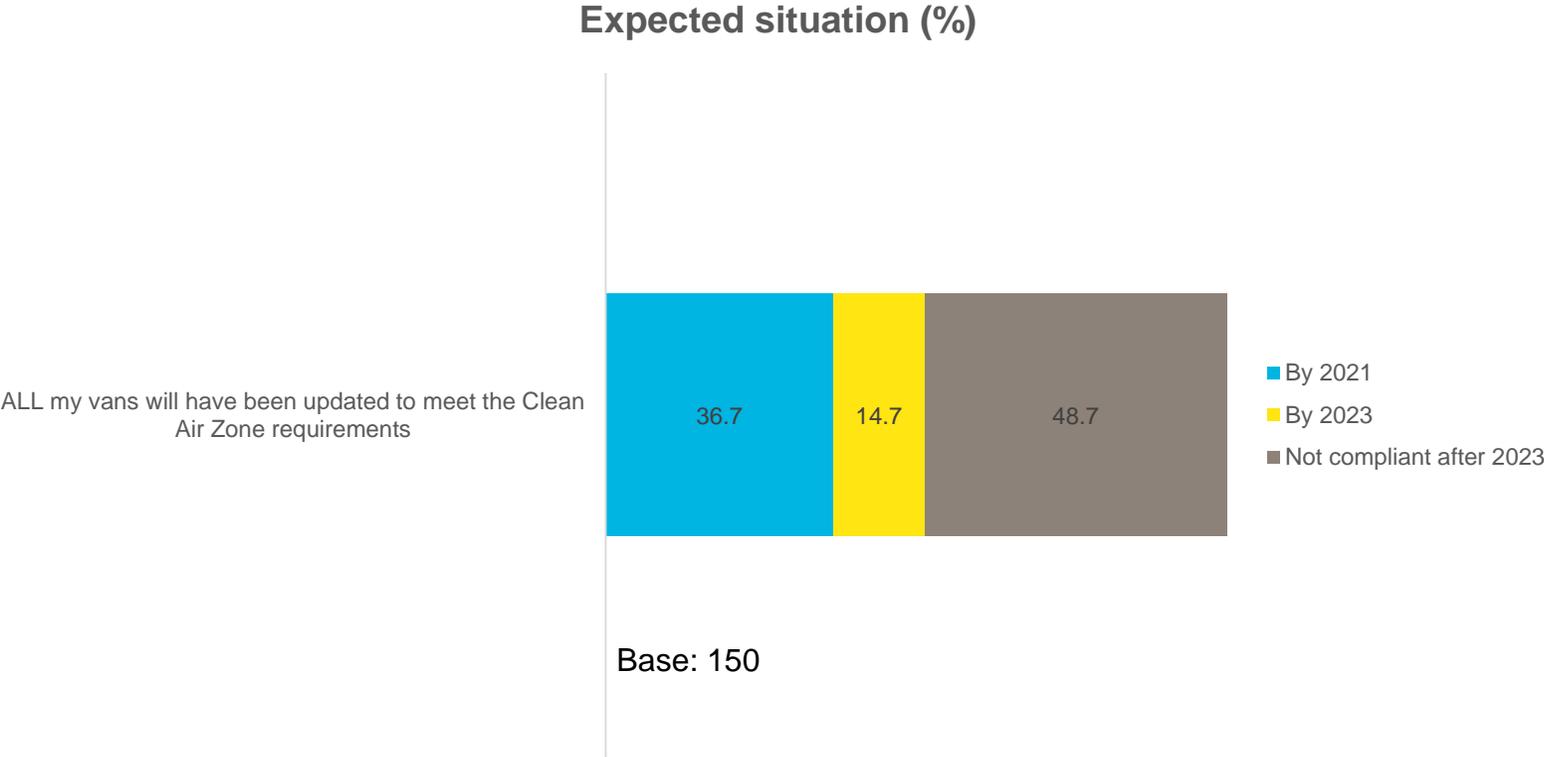


29% of businesses selected the same top 3 responses and 44% selected at least two of these three responses.

Face to face interviews with non-compliant van owners:  
Action taken if no funding available

# Expected compliance in 2021 and 2023 without a clean air zone

37% of businesses stated that they would have already upgraded their vans to be compliant by 2021 and this would increase to 51% by 2023.



# Expected situation in 2021 and action taken when the Clean Air Zone is introduced

Of the 95 businesses who had not naturally upgraded to a newer van by 2021, 18% would change if the Clean Air Zone was introduced and 41% would pay the charge, although some would use their vans on fewer days.

Action to be taken when the clean air zone is introduced in 2021:  
Those whose vans will not already be compliant (%)

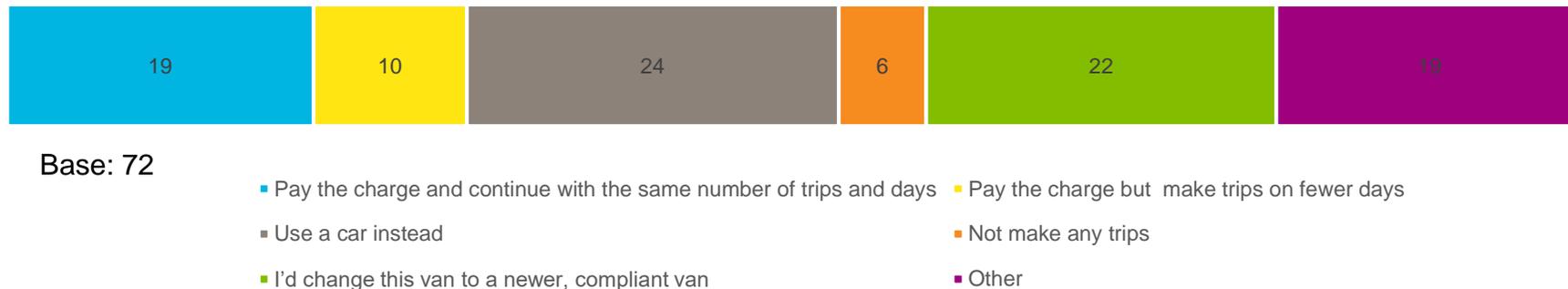


Of those who stated “other”, the responses were split between those who really didn’t know and those who would close their business. One respondent asked whether engines could be converted to the relevant clean standard.

# Expected situation and action taken when the Clean Air Zone is introduced: 2023

In 2023, of those businesses who would not have already purchased a newer van, 22% would change their van if a clean air zone was introduced and 29% of businesses would pay the charge with around 1/3<sup>rd</sup> of these choosing to drive on fewer days.

Action to be taken when the clean air zone is introduced in 2023:  
Those whose vans will not already be compliant (%)



The “other” responses provided were the same responses as 2021, either not knowing or who would close their business. 6 businesses stated they’d need to close their business, another 2 business owners stated the role of the employee would become redundant as the vans would not be replaced and 2 business owners stated they’d possibly retire.

# Why would businesses make their choice?: Summary

**Some businesses who would not or felt they could not change to a newer van felt they could adjust their way of working, which consisted of either:**

1. Keeping their “main” van which would be used for large deliveries and using a car for day-to-day journeys.
2. Some businesses that owned multiple vans would upgrade one van and either use this more frequently than other vans or stop using at least one van.
3. Using a car instead but still using a van for certain parts of their service to customers.
4. Working longer days, but fewer days per week.

**Some businesses who would not or felt they could not change to a newer van felt they had no choice to maintain their current behaviour and use of vans. Of these businesses:**

1. Most businesses felt they could not afford a newer van.
2. Some felt their van was mechanically sound and they’d only be able to consider a newer van at a later date.
3. Some businesses would pass the price of the daily charge on to the customer.

# Why make this choice?

## Pay the charge and continue with the same number of trips and days

The main reasons provided by businesses to carry on as businesses do currently was affordability of a newer van and because their current van is in good working order.

Not got the money to buy a newer van. If I buy a compliant van, how do I know they won't change their mind and bring something else in.

Don't think I could afford a new van, I would like one but it's finding the money for it.

Would rather pay the fee than get finance to buy a new van.

I have no issues with my van, not had it too long, too expensive to change it before 2021 would have to charge customers more to cover costs.

# Why make this choice?

## Pay the charge but make trips on fewer days

Most respondents would make adjustments to their working life such as:

- Working longer hours but on fewer days; or
- Use a “main” van, e.g. switching to a car on the days when a van wasn’t needed

I would look into working longer days. Hence cutting the number of days I’m travelling.

Reduce cost, but could try and transport materials in fewer days.

Until I could afford a newer van I would use my car and only use the van when necessary when I had large orders. For smaller ones I would use my car which is also diesel but I would not be charged for it.

I don't always need the van sometimes I could make do with a car. I'd have to change my working week around though and use car when I need to take less equipment with me. Not very convenient though it would mess my car up a bit.

# Why make this choice?

## Use a car

The respondents who would switch would either:

- Use an estate car;
- Use a trailer attached to a car; or
- Change the way of working to have direct deliveries to a customer.

I've always used a van and would miss using one, but wouldn't want to be paying daily charge every time I took my van anywhere. And taking into account the expense of buying a new van I'd be better off with a large estate car.

(I might use an) estate car but might have to get a trailer.  
Rely on more deliveries.

I could change to a larger hatchback or estate type car, no problem, maybe something like a people carrier.

I could get a hatchback car maybe, but would have a look at vans at that time to see if it was cheaper. I may have to adapt the way I work, i.e. if somebody wanted some large equipment on loan I might have to look to paying to get it delivered and pass on the cost to the customer.

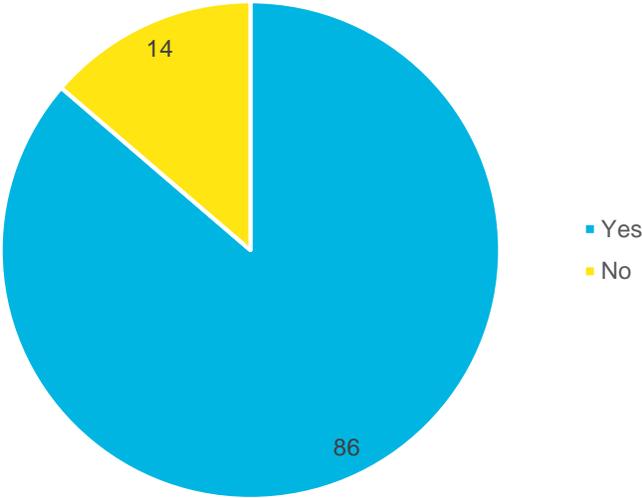
Face to face interviews with non-compliant van owners:  
Acceptability of the finance package

# Finance package

22% of respondents (18 businesses) who would meet the criteria to apply would not choose to apply for the finance package.

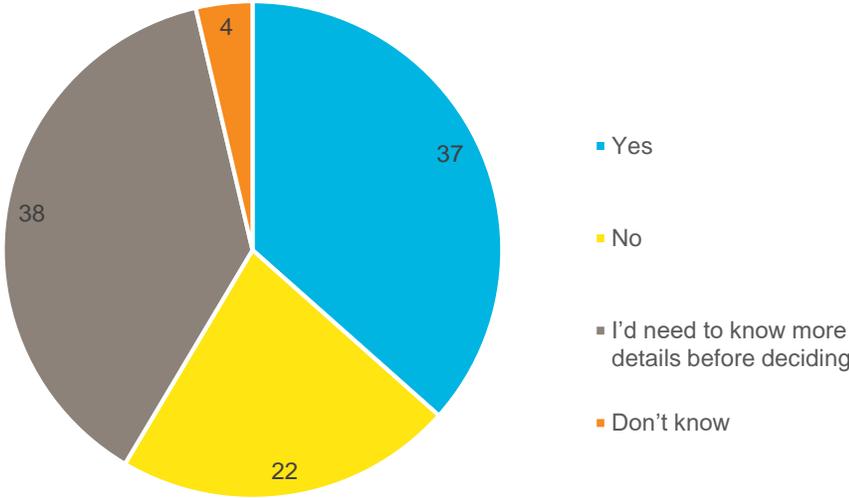
Of these, just over half said that one of the reasons for this is that they do not like being in debt.

Would meet the criteria to apply (%)



Base: 95

Would apply (%)



Base: 82

# How much would a new van cost?

Respondents were given the opportunity to check the potential cost of vans using <https://www.autotrader.co.uk/vans> although some felt they knew the cost of their vans.

The range of costs for a newer van varied from the lowest at £2,000 up to £65,000.

The mean average cost provided by businesses for changing to a newer, compliant van was £13,463.

# Finance package: Value

When respondents were presented with the potential finance package the calculations and they had multiple vans their responses were based on the cheapest of the vans they would need to replace.

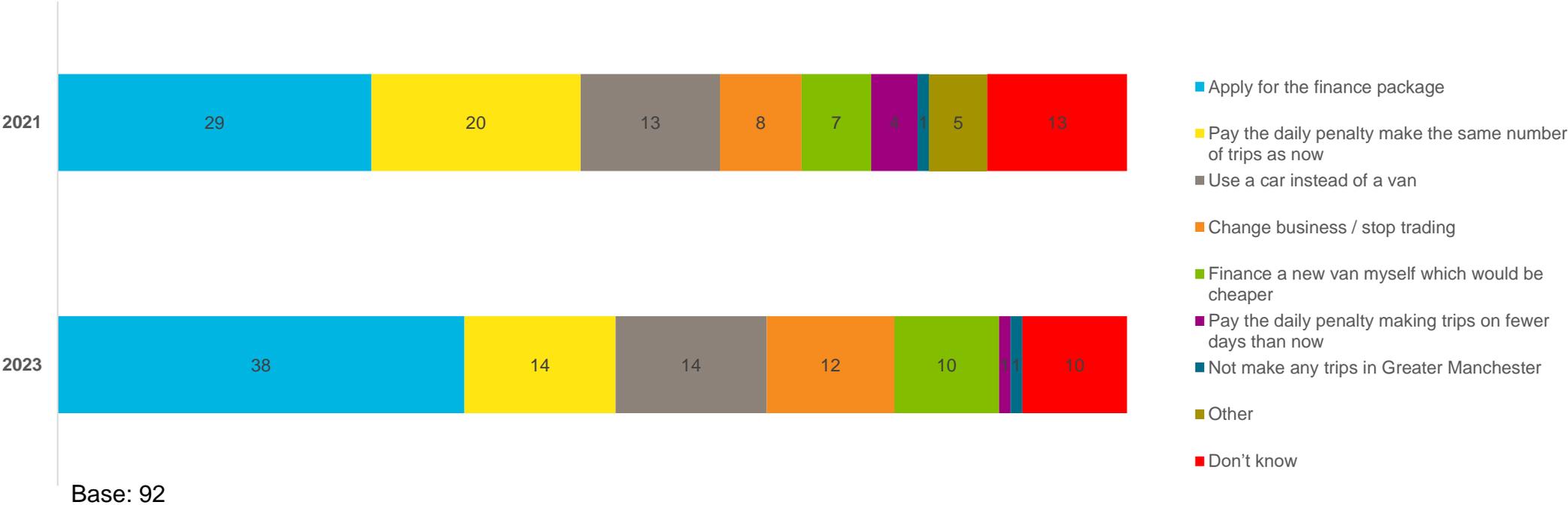
Respondents who had stated their only reason for not applying was that they didn't like being in debt were not asked about the finance package.

The average assumed cost of those who would apply for finance was	£ 12,375
This equated to a 25% deposit required to be paid by businesses, per van, of	£ 3,094
The assumed value needing to be borrowed was	£ 9,281
Although respondents were advised that the term could be up to 48 months, some chose a shorter time period and the average time the businesses wanted to pay off the finance was:	43 months
The funding of 3 months interest that would be payable to businesses would be:	£ 742
Base	92

# Finance package

29% of respondents would apply for a finance package in 2021 and this proportion increased to 38% if the clean air zone was introduced in 2023. Offering the finance package in 2023 reduced the proportion of businesses stating they'd pay the daily charge, from 20% to 14%.

Action taken if finance package offered (%)

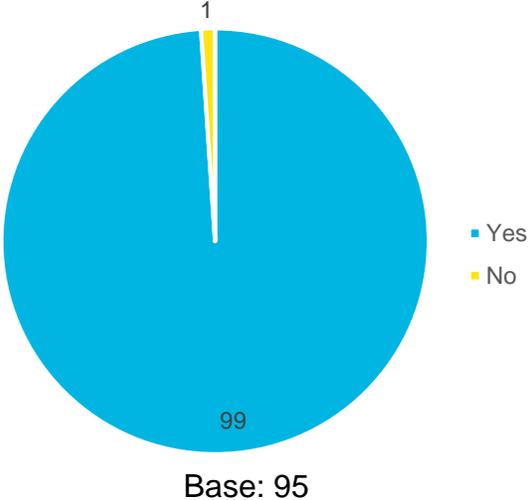


Face to face interviews with non-compliant van owners:  
Level of grants acceptable

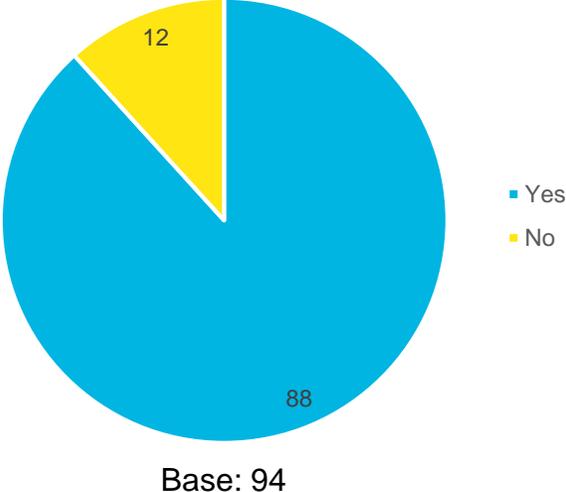
# Grants

All but one person felt they would meet the criteria to apply for grants.  
Of the 11 respondents who would not apply, 7 stated they would still struggle to afford the extra cost of the van.

Would meet the criteria to apply (%)



Would apply (%)

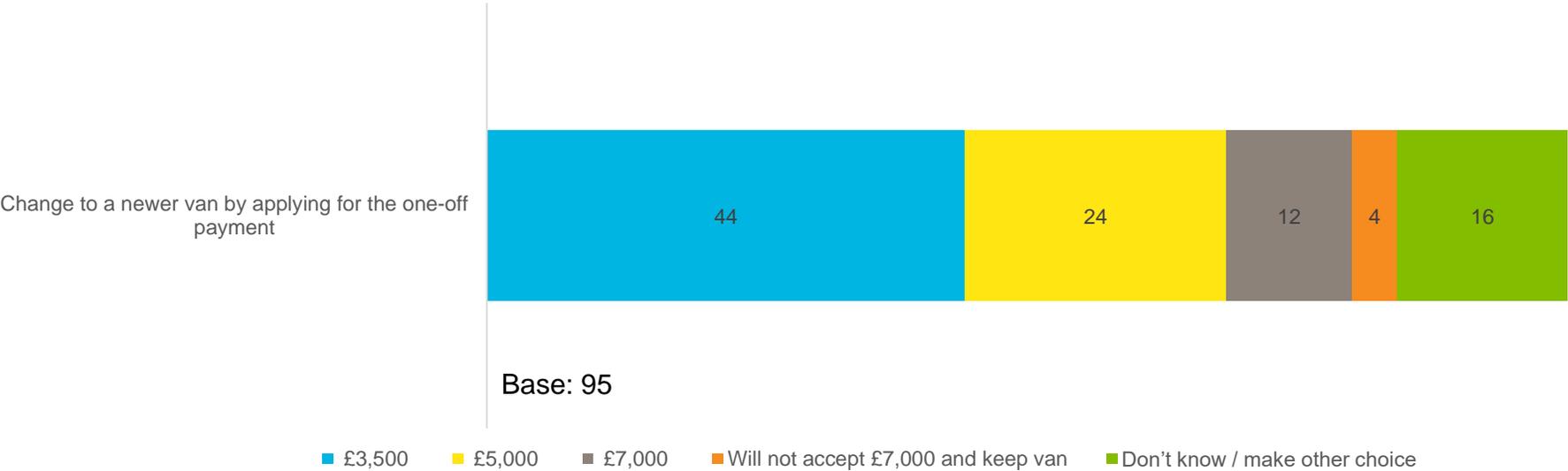


# Grants: What amount would be acceptable?

The 95 businesses who would not have upgraded their vans by 2021 were asked about different levels of grants, starting with the lowest, to establish whether the amount of grant they would need to change their van.

44% of these businesses would change their van if offered the £3,500 grant and this would increase to 80% if the grant was increased to £7,000.

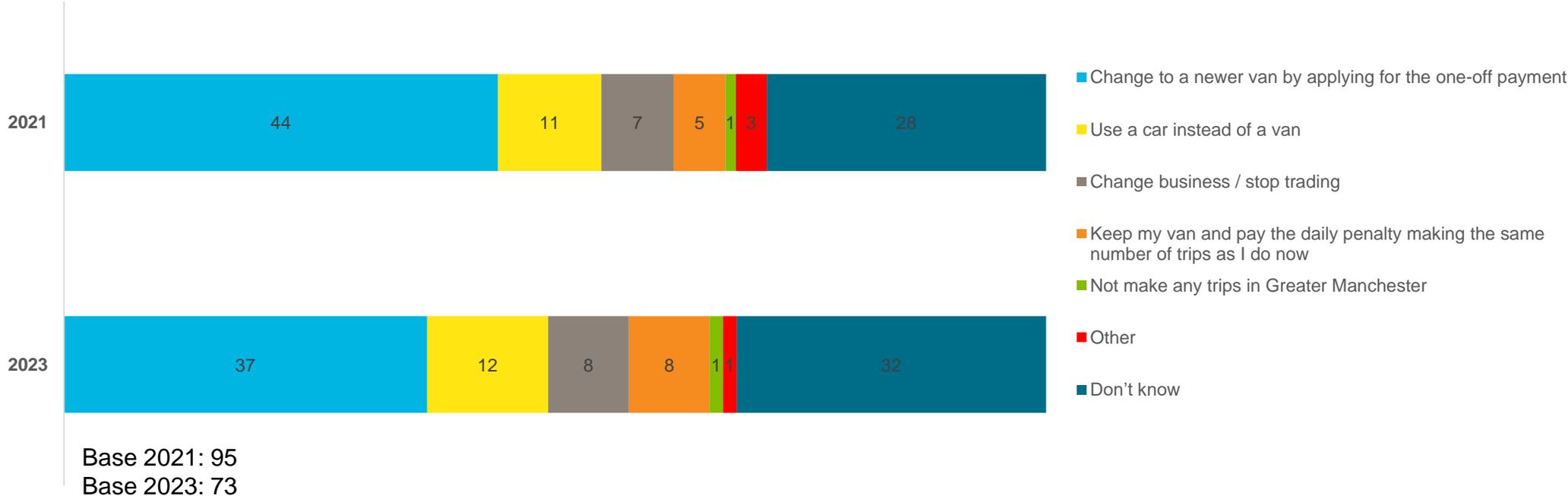
Level of grant needed to change to a new van (%)



# Grants: Acceptability of £3,500

By offering £3,500, nearly half the respondents would use this to change to a newer van. When those who would not have naturally changed vans in 2023 were asked if this would change in 2023 37% of businesses stated they would change to a newer van if £3,500 was offered.

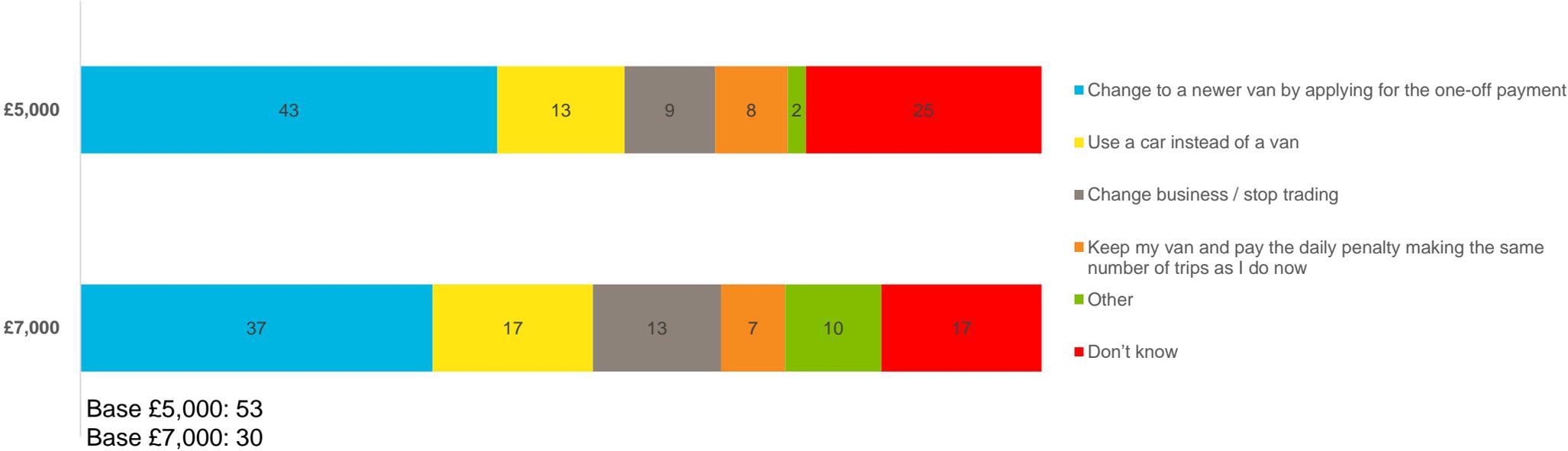
Action taken £3,500 grant offered (%)



# Grants: Acceptability of £5,000 and £7,000

If a respondent did not change their van in 2021 when a grant of £3,500 was offered, the levels were increased to £5,000 and then to £7,000 if £5,000 didn't prompt a change in van. The responses to these two amounts are shown below\*.

Action taken £5,000 or £7,000 grant offered (%)



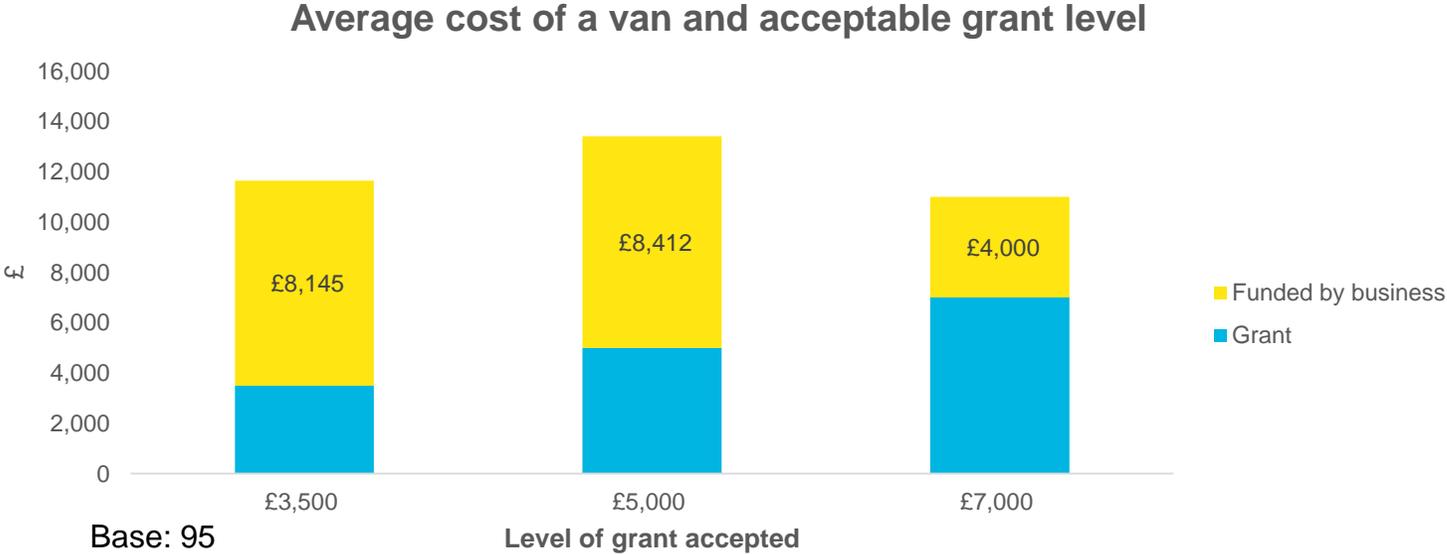
\*Please note the base sizes for both of these grants are low and data should be treated with caution.

# Grants: Cost of the van compared to the value of the grant

The difference in assumed cost for a van\* varied by just over £2,412 between acceptable grant levels. The highest level of grant also had the lowest average cost per van (£11,000) with the highest average cost per van being £13,412 for those who would change to a newer van with a £5,000 grant.

The average cost of a van where a £7,000 grant was not accepted was £17,308

\* Respondents were given the opportunity to check potential cost of vans using <https://www.autotrader.co.uk/vans>

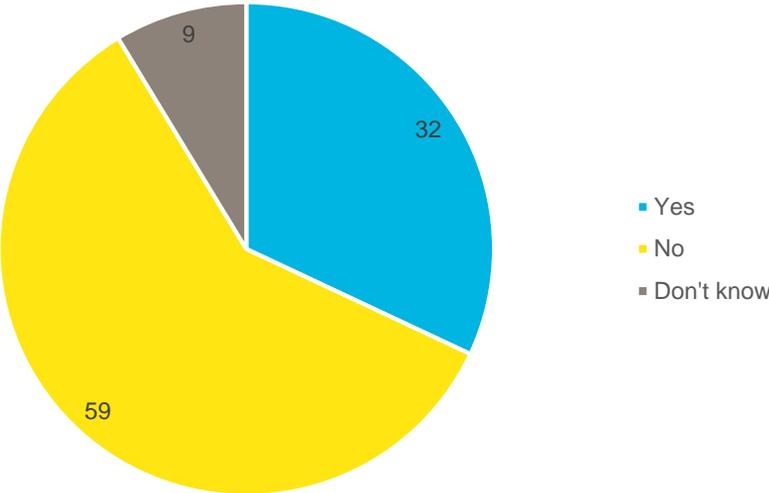


# Electric vans

# Electric vans

The 150 business owners with non-complaint vans were asked if they would ever consider purchasing an electric van. For consistent feedback, those who stated they would be interested were advised of the potential cost of a new electric van based on the van size.

Would consider an electric van (%)



Base: 150

# Electric vans: why not?

The main reasons respondents gave to explain why they were not ready to move to electric vans were:

- Initial cost and cost of replacement batteries;
- Charging infrastructure; and
- Concern about mileage range, both for business and for those using vans for personal reasons;

Just far too expensive, maybe in a few years when electric becomes more widely used the prices will come down. Probably when we start to see the second hand market for these vehicles. I'm not in the market to spend a lot on a work vehicle.

I've heard the replacement batteries for these are very pricy and don't last very long. Think it will become time before electric vehicles are suitable for my use. Also the price is far too expensive. I run a small business and the way things are in retail at the moment often don't make so much of a profit therefore need to keep my costs down to a minimum.

If we all went electric the power grid would collapse overnight so I would wait until the infrastructure was better. We do some work with a company that has an electric delivery van and twice it has run out of electric.

Electric vehicles far too expensive versus diesel vans, running costs of electric van's that I have researched would be double the cost of diesel.

The cost and you are limited to the amount of miles you can do and I need energy for the fridge.

The range. I can do a lot of miles it's not suitable for me and I don't know a lot about them.

# Electric vans

For consistent feedback, those who stated they would be interested were advised of the potential cost of a new electric van based on the van size and then asked how much funding they would need to support them changing to an electric van. The proportion of the total cost was always close to 50%, irrespective of van size and cost.

	Amount requested by a business owner to change to:		
	A small electric van	A Mercedes Vito	A Large electric van
Potential cost of van	£24,000	£40,000	£60,000
Mean	£11,500	£22,000	£27,667
Median	£12,000	£20,000	£30,000
Mode	£12,000*	£20,000	£30,000
Proportion of total cost (using mean average)	48%	55%	46%
Base size	31	48	12

\*Multiple modes exist. The smallest value is shown, the other mode is £14,000

# Conclusions

# Conclusions: Telephone

27% of businesses contacted owned at least one van. Construction (66%) and manufacturing (35%) had a higher than average proportion of businesses owning at least one van.

Businesses interviewed, who owned a van, had on average 1.57 vans, with 71% of businesses owning one van only, almost all vans owned used diesel.

83% of businesses own at least one non-compliant van and 74% do not own any compliant vans. The remaining 17% of businesses owned vans which were all compliant.

48% of businesses will change their vans when they are over 10 years old or no longer fit for purpose, compared to 20% who change their vans before they are 4 years old.

The average van makes 4.8 trips per week.

# Conclusions: Face-to-Face

## How businesses currently fund a purchase of a newer van

The most important factors when deciding how to fund a new van are:

- Suitability for the job
- Initial cost
- Running costs

The least important factors are whether the van is good for the environment and availability of finance.

66% of respondents would use their old van in part-exchange for a the purchase of a newer van.

52% of respondents would need to borrow money to finance the purchase of a newer van, hire purchase and taking out a loan were the two main sources of finance.

# **Conclusions: Face-to-Face Action on introduction of the Clean Air Zone, without finance**

If the Clean Air Zone is introduced without any funding 49% of businesses will change to a newer, compliant van by 2021, increasing to 63% in 2023.

In 2021, 43% of businesses would keep and use their current van (18% would plan to make fewer trips).

By 2023, 29% of businesses would keep and use their current van.

The main reasons respondents gave for not changing to a compliant van were affordability and because their van is in good working order. Businesses considered how they could adjust their working practices, examples provided were having direct deliveries to site and working longer days (especially in the summer).

Other alternatives to a van considered by respondents were estate cars and trailers attached to their car.

# Conclusions: Face-to-Face

## Reaction to the offer of a finance package

The average cost of a newer van, assumed by the respondent, was £13,463.

92 businesses, who had not already advised they would change their vans, would apply for the finance package.

In 2021, if the finance package suggested was offered, 29% would apply and if successful would purchase a compliant van, a further 7% would choose to finance a purchase themselves which they believe would be available at a lower rate.

In 2023, if the finance package suggested was offered, 38% would apply and if successful would purchase a compliant van, a further 10% would choose to finance a purchase themselves which they believe would be available at a lower rate.

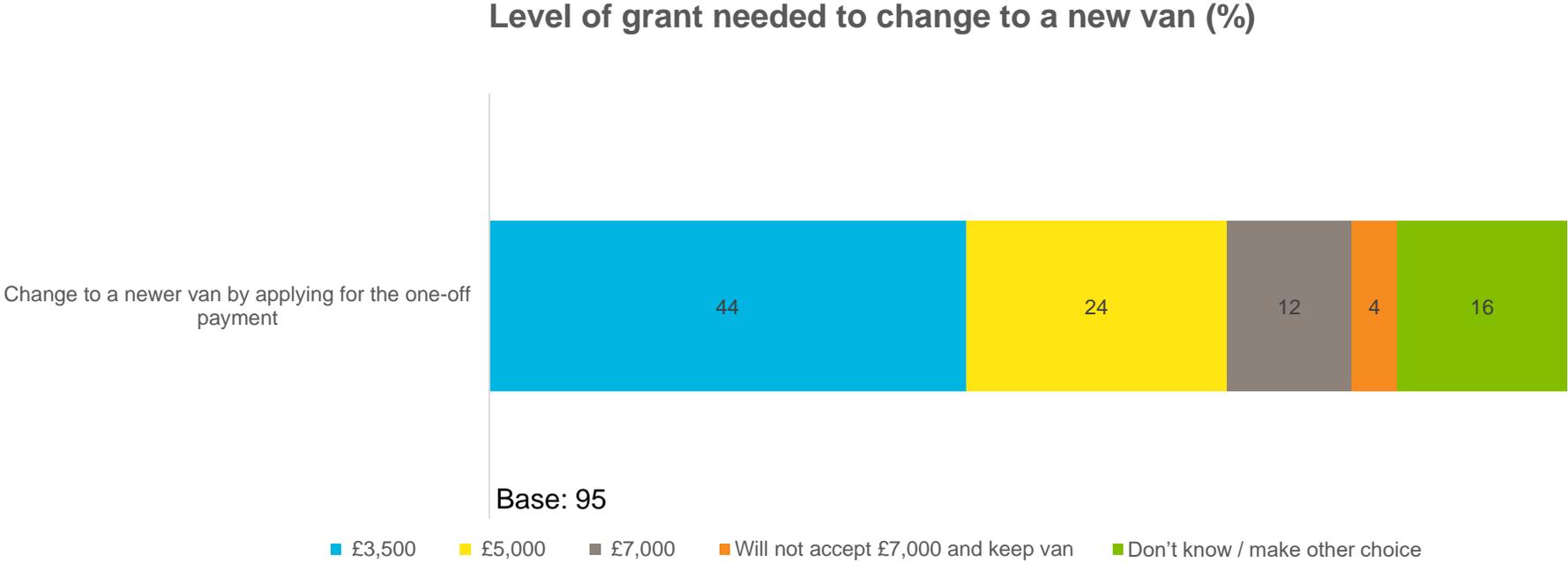
The average value of loans per business would be £9,281.

The 3 monthly payment offered would equate to £742.

# Conclusions:

## Reaction to the offer of a grant

All but one person felt they would meet the criteria to apply for grants but seven out of eleven respondents who would not apply stating they would still struggle to afford the extra cost of the van.



Where a £7,000 grant was not accepted, the average cost of a van assumed by the respondent was £17,308.

# Conclusions: Electric vans

32% of businesses would consider electric vans in the future.

The reasons businesses would not consider electric vans were mainly vehicle range, infrastructure of charging points and the initial cost, including the cost of replacement batteries.

The proportion of funding to van cost remained around 50% of the total cost of an electric van provided in the questionnaire, irrespective of size (and cost) of the van.

# Appendix A: Methodology and Questionnaire

# Methodology: Respondent qualification criteria

Respondents were required to be either van owners or a financial decision maker in a business that owned at least one van. The business size was restricted to companies with fewer than 10 employees.

The types of vehicles that businesses must own to participate in the survey were:

- car-derived vans
- panel vans
- short and long wheel base vans
- pickup trucks
- unlicensed minibus (i.e. not a taxi)
- motorised horseboxes (with less than 3.5t gross vehicle weight)

**Face-to-face survey only:** In addition, the respondent needed to own at least one van that would be not be compliant if the Clean Air Zone was introduced today.

# Methodology: Telephone

## **Sampling:**

Sample was selected by industry sector based on national statistics for the proportion of vans by sector. Greater Manchester data was unavailable. A list of respondents was sourced using the Experian database. The Experian database included the business size and industry sector.

## **Incentives:**

There were no incentives offered to complete the telephone survey.

## **Timing:**

Interviews were administered over 5 weeks during September and October 2019.

# Methodology: Face-to-face

## Sampling:

Sample was sourced either by:

1. Contacting respondents who had taken part in the telephone survey who had agreed to be contacted in the future to take part in a face-to-face interview.
2. Free-find interviews targeting areas where van owners were likely to be such as trade outlets.

## Incentives:

An incentive of £20 was offered to respondents to recognise the time they took to complete the survey and due to the financial information requested in the survey.

## Timing:

Interviews were administered over 4 weeks during October 2019.

# Questionnaires

There were two questionnaires administered. The telephone survey took 5 minutes to administer and the face-to-face survey took between 20 and 30 minutes to complete, depending on the number of vans owned by the respondent.

## Topics covered in the telephone interview

- Business size and sector;
- The number of vans by age and fuel type, per business;
- The regularity that businesses change their vans;
- The distance travelled by vans in Greater Manchester; and
- The number of times per month a van is used in Greater Manchester.

## Topics covered in the face-to-face interview

- The likelihood of owning a compliant van by the years 2021 and 2023 without funding;
- Behavioural change when the Clean Air Zone is introduced;
- The action taken should a finance package be available;
- The action taken should a grant be available and whether this would change based on the value of the grant; and
- Views on changing to electric vans.

The two questionnaires are available here:



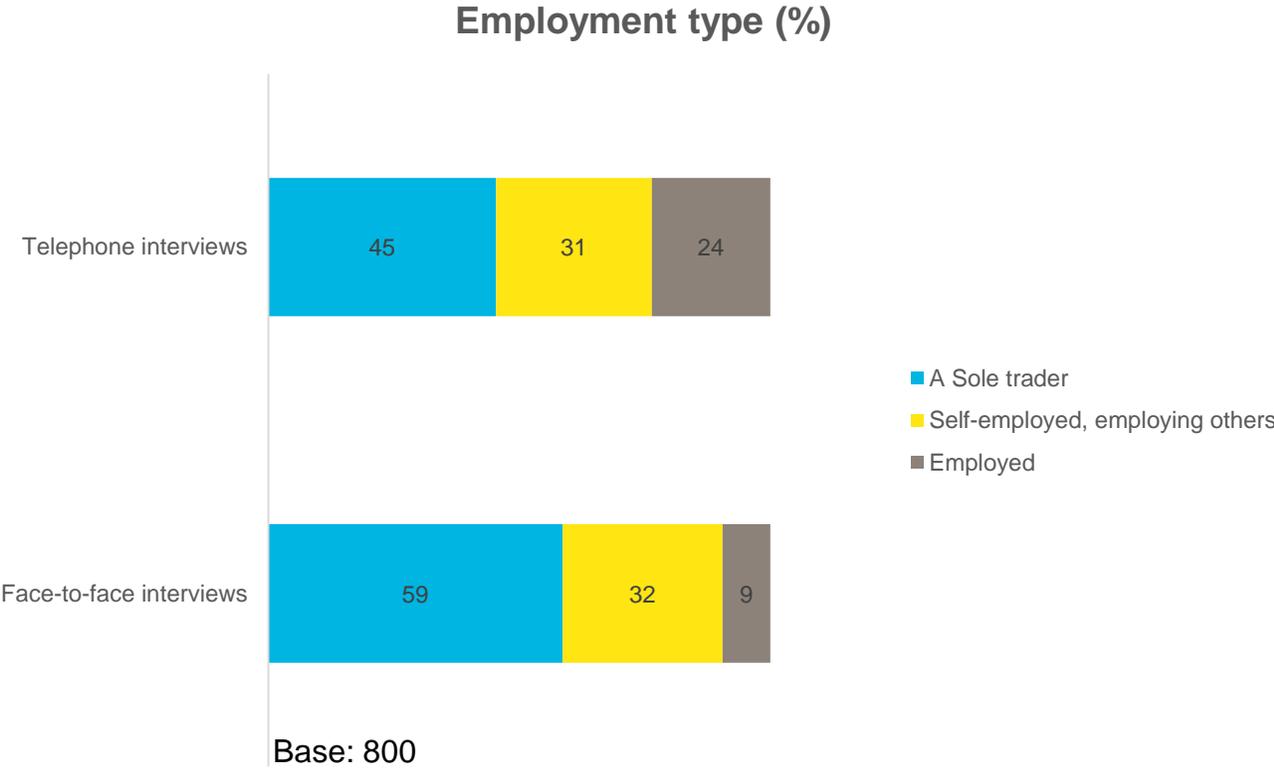
CATI  
Questionnaire



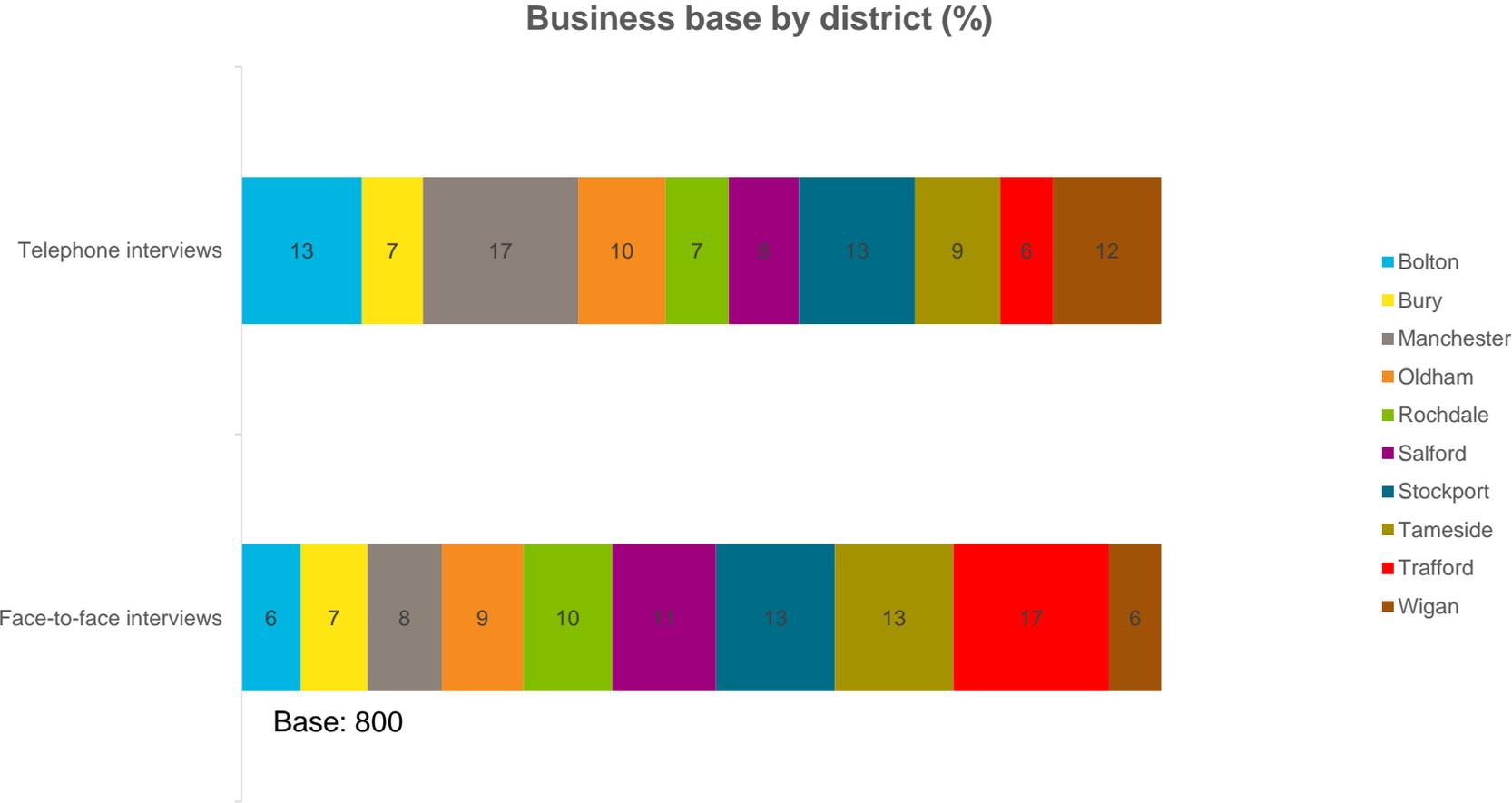
FTF Questionnaire

# Appendix B: Respondent profile: Telephone Survey

# Respondent profile: Employment status

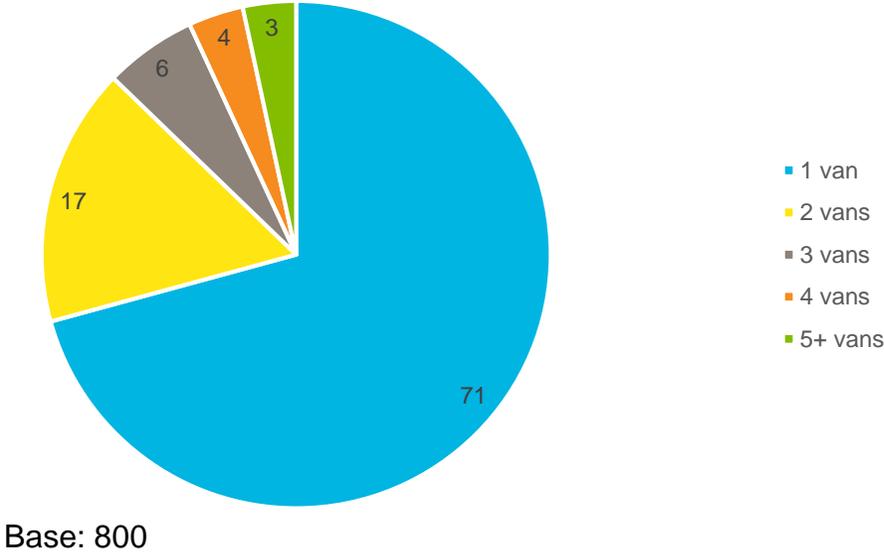


# Respondent profile: District



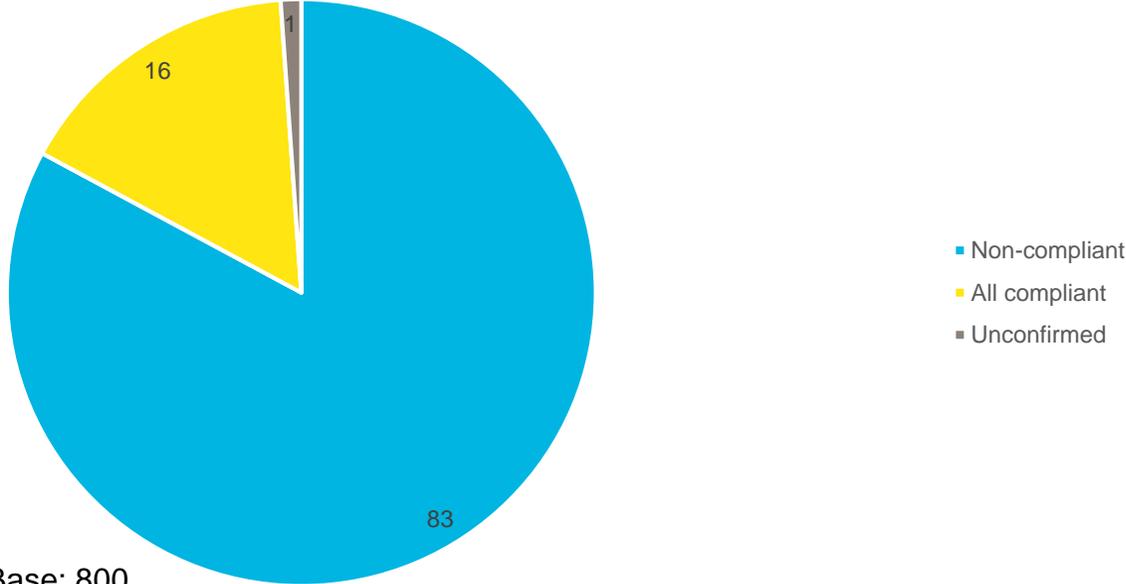
# Respondent profile: Number of vans

Number of vans per business (%)



# Respondent profile: Businesses with compliant vans

Businesses with compliant vans (%)



# Appendix C: Data tables and van incidence

# Data tables and incidence

All data was anonymised before analysis.

## Data tables

Data tables are shown below for the face-to-face and telephone surveys.

Questions are crossed by employment status and industry sector with significance testing at the 95% confidence level.



## Incidence

The incidence\* for all business sectors and for sector combined with business size is here:



Incidence by  
business size and sector

\*All incidences are for guidance only and should be used with caution, especially those with low base sizes.

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