



What people think,
feel and do

APPENDIX 2



Hammersmith & Fulham

Local preferences in environmental policies



Key findings

20 February 2024



Introduction

An introduction to this research

Welcome to this report on local preferences regarding environmental policies, with a specific focus on a clean air neighbourhood trial in the southern part of the London Borough of Hammersmith & Fulham. This report was drafted by Opinium, a full-service insight and market research agency based in London.

Opinium conducted three separate surveys across two phases of research to ensure a thorough understanding of local residents and business's perspectives.

1. The first phase involved door-to-door surveys with residents living in the clean air neighbourhood trial zone in southern Fulham, undertaken between July 17 and July 26, 2023. Total number of responses: 258.
2. The second phase targeted the rest of the borough more widely, specifically:
 - a. A door-to-door survey of residents outside the trial zone [fieldwork dates: January 19 to January 26, 2024] Total number of responses: 278.
 - b. An online consultation spanning the entire borough [fieldwork dates: January 15 to February 3, 2024] conducted amongst both residents and local businesses. Total number of responses: 1,989.

Our primary goal is to capture an accurate representation of local residents' views on key policies that could be implemented by the relevant local authority, the London Borough Council of Hammersmith & Fulham.

The results presented in this report stem from these three distinct sources. Throughout this report, we aim to acquaint you with the findings from these surveys, providing context to the results, and summarise the top-line results. Part of the report's scope will be to shed light on any variations in responses over time, geography, and methodology.

By assessing these differences, we hope to offer a straightforward understanding of the local sentiment toward environmental policies in Hammersmith & Fulham.

What we asked

The survey begins with an introduction to the research purpose. This is followed by questions addressing community interest in installing green energy products, opinions on banning wood-burning stoves, and support for measures targeting out-of-borough traffic. It then explores into reasons for support or opposition to such schemes, explores preferences for enforcing traffic rules, assesses awareness of air pollution as a public health concern, and gauges opinions on various neighbourhood changes, including improved air quality, reduced congestion, and enhanced green spaces. The survey concludes by looking at perceptions of potential neighbourhood benefits from a range of proposed changes, spanning safety improvements, cultural activities, and outdoor recreation.

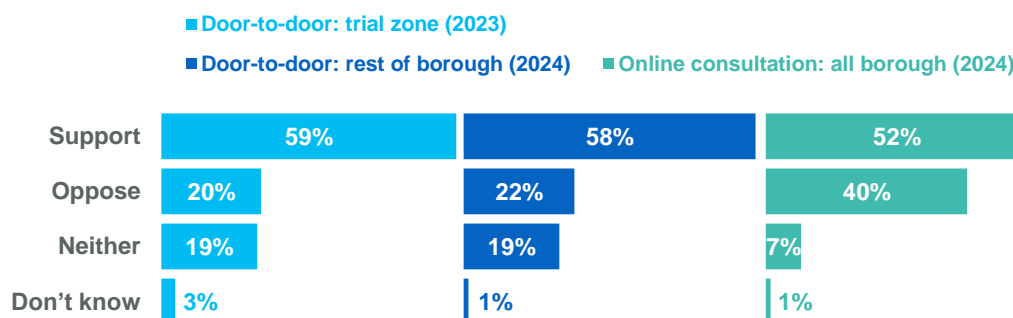
Out-of-borough traffic measures

Schemes to tackle air pollution and congestion by reducing the amount of out-of-borough traffic

Evidence suggests the public support measures to reduce out-of-borough traffic, especially within the trial zone

In the 2023 door-to-door trial zone survey, a majority support (59%) and a fifth (20%) oppose. In the 2024 door-to-door survey for the rest of the borough, 58% support the measures, only a fifth (22%) oppose. The online consultation in 2024 showed that 52% (slightly over a half) supported the measures, opposition was at 40% (two-fifths).

Would you say you support or oppose schemes to tackle air pollution and congestion by reducing the amount of out-of-borough traffic using neighbourhood streets as cut-throughs?



In the online consultation, residents in the trial zone were even more likely (65% supporting vs 29% opposing) than the rest of the borough to support schemes to reduce the amount of out-of-borough traffic (45% supporting vs 46% opposing). Business tended to oppose these measures.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Support	45%	65%	34%	34%
Oppose	46%	29%	57%	59%
Neither	8%	6%	9%	7%
Don't know	1%	0%	0%	0%

Factors driving support for these schemes

A healthier environment and less congestion on the road were the strongest drivers of support for cutting out-of-borough traffic

A healthier environment was the most supported reason across all surveys, with support growing from 79% in the 2023 door-to-door trial zone survey to 84% in the 2024 door-to-door rest of borough survey, and peaking at 90% in the online consultation.

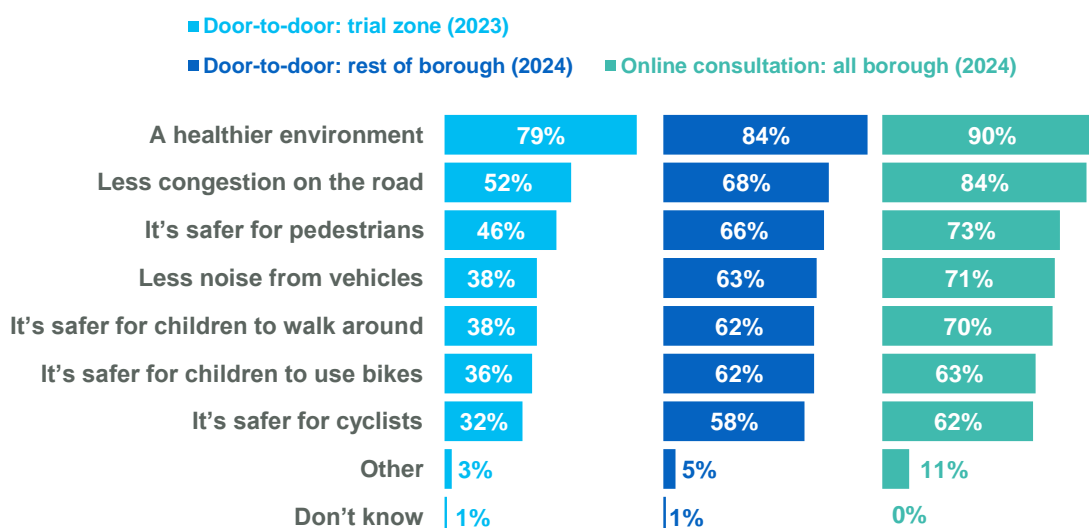
Support for reducing congestion on the road was the second most popular reason, with just over half (52%) in the 2023 survey, increasing to 68% (about two-thirds) in the 2024 door-to-door survey, and reaching 84% in the online consultation.

Safety for pedestrians was another key reason for support, with less than half (46%) in the 2023 survey, but this increased to two-thirds (66%) in the 2024 door-to-door survey and nearly three quarters (73%) in the online consultation.

Noise reduction from vehicles also saw an upward trend in support, starting at 38% in the 2023 survey, growing to 63% in the 2024 door-to-door survey, and reaching 71% in the online consultation.

The safety for children walking around and using bikes, and safety for cyclists, were supported by 38%, 36%, and 32%, respectively, in the 2023 survey. These figures saw substantial increases in both the 2024 door-to-door survey (62%, 62%, and 58%, respectively) and the online consultation (70%, 63%, and 62%, respectively).

And do you support the idea of these schemes for any of these reasons?





In the online consultation the most common top two reasons across all groups for supporting these schemes was because they would bring about a healthier environment and less congestion on the road.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
A healthier environment	93%	88%	90%	80%
Less congestion on the road	81%	88%	87%	70%
It's safer for pedestrians	74%	72%	73%	55%
Less noise from vehicles	70%	74%	83%	60%
It's safer for children to walk around	68%	72%	80%	65%
It's safer for children to use bikes	63%	63%	80%	55%
It's safer for cyclists	68%	57%	77%	60%
Other	11%	10%	27%	20%

Factors driving opposition for these schemes

The most common driver of opposition to cutting out-of-borough traffic was the concern that it would displace the traffic to other streets

The opposition to environmental schemes in Hammersmith & Fulham is focused on several key issues, with traffic diversion being the most significant. In the 2023 door-to-door trial zone survey, nearly half (47%) opposed the schemes because they felt traffic would just move onto other streets. This concern grew in the 2024 surveys, with over half (54%) of respondents in the door-to-door survey for the rest of the borough and a striking nine-tenths (90%) of those who oppose these schemes in the online consultation expressing the same concern.

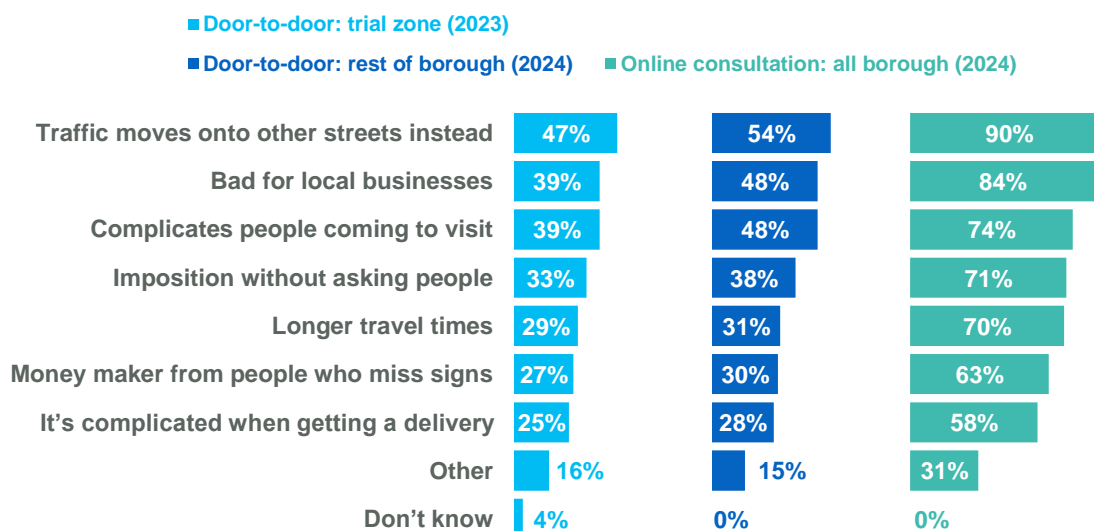
The impact on local businesses was the second most cited reason for opposition, with 39% in the 2023 survey and an increase to 48% in the 2024 door-to-door rest of borough survey. The online consultation saw an even more pronounced opposition due to business impacts, with 84% (nearly eight-tenths) of participants citing it as a reason.

Visitor complications and perceived imposition of schemes without asking people were other notable reasons for opposition. Both reasons saw a respective 12% and 5% increase in opposition from the 2023 to the 2024 door-to-door surveys, and significantly higher opposition in the online consultation, with 74% and 71% opposed, respectively.

Less common concerns included longer travel times and issues arising from missed signage, which 29% and 27% opposed in the 2023 trial zone survey. These figures were similar in the 2024 door-to-door survey but jumped to 70% and 63% in the online consultation.

Complications with deliveries were cited by a quarter (25%) of respondents in the 2023 survey, increasing slightly in the 2024 door-to-door survey (28%) and more substantially in the online consultation (58%).

And do you oppose the idea of these schemes for any of these reasons?





In the online consultation, residents both in and out of the trial zone were most likely to say a reason for their opposition would be because these schemes could move traffic onto other streets instead and because it would be bad for local businesses. Businesses were also more likely to point to longer travel times than residents.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
They just move traffic onto other streets instead	92%	87%	88%	79%
Bad for local businesses	82%	86%	86%	100%
It's complicated when people come to visit	72%	80%	67%	71%
They get imposed without asking people	71%	68%	71%	68%
Longer travel times	69%	68%	78%	82%
They're just designed to make money from people who miss the signs	64%	58%	65%	68%
It's complicated when getting a delivery	59%	56%	53%	71%
Other	27%	38%	31%	35%

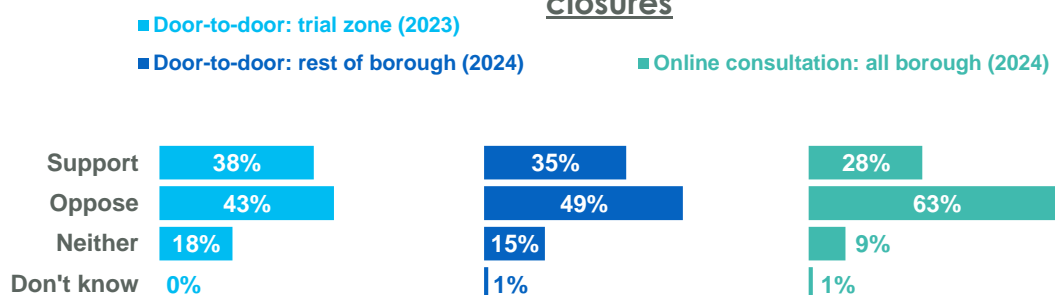
Implementing measures that cut out-of-borough traffic

While residents tend to oppose physical road closures, there is support for using smart technology cameras to implement the policy

In the 2023 door-to-door trial zone survey, support was at 38% for using physical road closures, with opposition slightly higher at 43% and 18% neither supporting nor opposing. The 2024 door-to-door rest of borough survey showed a slight decrease in support to about one-third (35%), with an increase in opposition to around half (49%), and 15% neither supporting nor opposing, while 1% did not know.

In the online consultation for the entire borough in 2024, support further declined to 28% (about one quarter), with opposition rising substantially to 63% (over three-fifths). Only 9% (nearly one-tenth) were neutral, and 1% were undecided.

Please tell us whether you support or oppose each method being used to enforce traffic rules: Using physical road closures



Over three in five residents and businesses, both within the trial zone and across the rest of the borough, oppose physical road closures. This is stronger than the opposition encountered in the non-self-selecting door-to-door surveys conducted.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Support	28%	29%	24%	21%
Oppose	63%	62%	69%	69%
Neither	9%	9%	8%	9%
Don't know	1%	1%	0%	2%

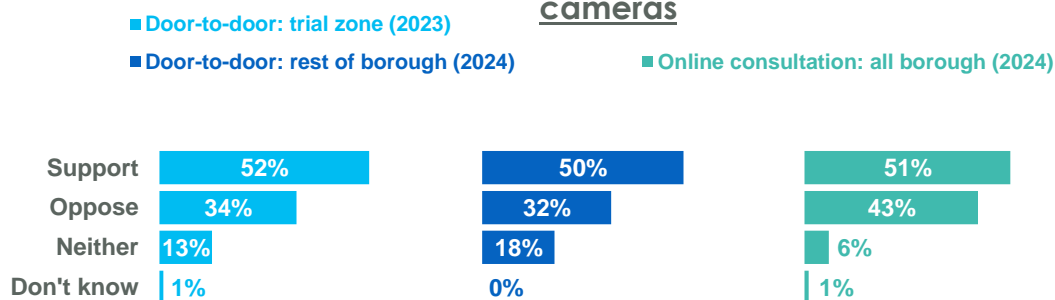
Support for smart technology cameras

Majority are in support of using smart technology cameras, across the online consultation and the door-to-door surveys

In the 2023 door-to-door trial zone survey, a majority (52%) support the use of these cameras, a third (34%) opposed, 13% were neutral, and only 1% were unsure. The 2024 door-to-door survey in the rest of the borough had similar results, with half (50%) supporting the technology, 32% (about one-third) opposing, a slightly higher 18% (nearly one-fifth) neutral.

The online consultation in 2024 showed a marginal increase in support to just over half (51%), with opposition at 43% and a smaller 6% neutral.

Please tell us whether you support or oppose each method being used to enforce traffic rules: Using smart technology cameras



When comparing the support for using smart technology cameras to the support for using physical road closures to enforce traffic rules, there is a notable difference in public opinion. Support for smart technology cameras remained relatively stable across all surveys, with a slight majority in favour (52% in the 2023 trial zone, 50% in the 2024 rest of borough, and 51% in the online consultation). Opposition to cameras was less than half in all cases (34%, 32%, and 43%, respectively).

The online consultation shows that support for smart technology cameras was higher in the trial zone than across the rest of borough (65% vs 44% respectively). However, businesses tended to oppose this measure too, in line with their general opposition to traffic-cutting measures.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Support	44%	65%	33%	34%
Oppose	48%	31%	64%	60%
Neither	7%	3%	3%	5%
Don't know	1%	1%	0%	0%

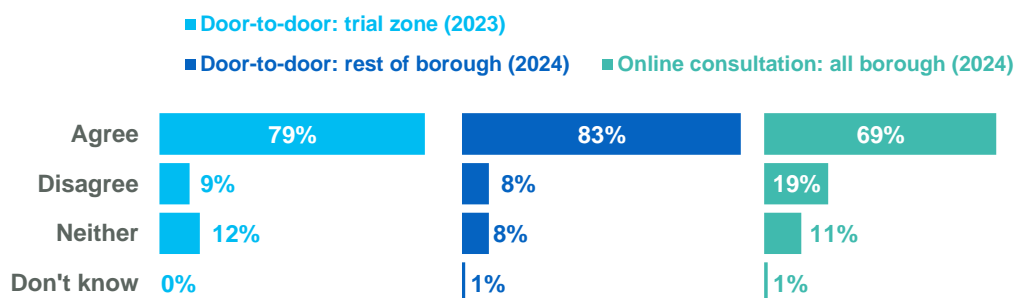
Air pollution

Air pollution as a public health issue

Residents and business agree that air pollution is a significant public health issue

When it comes to residents' opinions on whether air pollution is a significant public health issue, a strong majority agree in all surveys. 79% in the 2023 trial zone, 83% in the 2024 rest of borough, and 69% in the 2024 online consultation. Disagreement was lowest in the 2024 rest of borough at 8%, compared to 9% in the 2023 trial zone and higher at 19% in the online consultation. Those who were neutral (neither agreeing nor disagreeing) were 12% in the 2023 trial zone, 8% in the 2024 rest of borough, and 11% in the online consultation.

To what extent do you agree or disagree with the following statement: "Air pollution is a significant public health issue"



According to the online consultation, three quarters (74%) of residents in the trial zone and two thirds (67%) of residents across the rest of the borough agree that air traffic is a significant public health issue. Businesses tend to agree although slightly less strongly than residents.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Agree	67%	74%	53%	60%
Disagree	20%	15%	28%	24%
Neither	11%	9%	18%	14%
Don't know	1%	1%	1%	2%

Neighbourhood needs

What the neighbourhood would benefit from

Improved air quality and reduced congestion is a common theme in what residents think their neighbourhood would benefit from

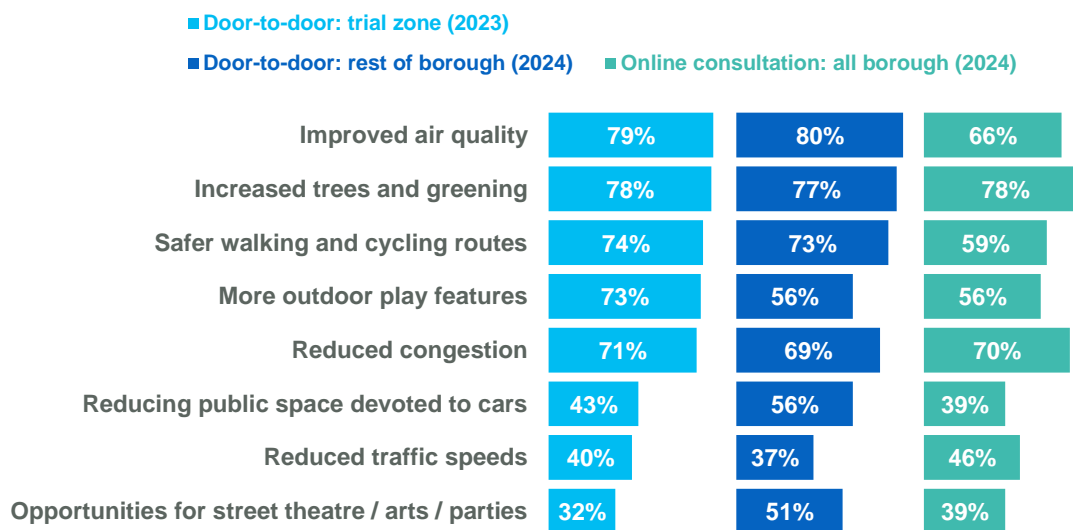
Improved air quality was seen as beneficial by the majority across all surveys, with 79% in the 2023 trial zone, 80% in the 2024 rest of borough, and two sixths (66%) in the online consultation. Increased trees and greening were also highly regarded, with 78% and 77% in the 2023 and 2024 door-to-door surveys, respectively, and a matching 78% in the online consultation.

Safer walking and cycling routes were viewed positively by 74% and 73% in the 2023 and 2024 door-to-door surveys, respectively, but less so in the online consultation at 59%. More outdoor play features were considered beneficial by 73% in the 2023 trial zone, 56% in the 2024 rest of borough, and 56% in the online consultation.

Residents felt that reduced congestion would benefit the neighbourhood, as indicated by 71% in the 2023 trial zone, 69% in the 2024 rest of borough, and 70% in the online consultation. Reducing public space devoted to cars was seen as beneficial by fewer residents, with 43% in the 2023 trial zone, increasing to 56% in the 2024 rest of borough, and 39% in the online consultation.

Reduced traffic speeds were seen as beneficial by 40% in the 2023 trial zone and less so in the 2024 door-to-door and online consultations, at 37% and 46%, respectively. Opportunities for street theatre, arts, and parties were the least considered beneficial, with 32% in the 2023 trial zone, rising to 51% in the 2024 rest of borough, and 39% in the online consultation.

Do you think your neighbourhood would benefit from each of the following possible changes?





According to the online consultation, residents generally thought that Increased trees and greening and reduced congestions would benefit their neighbourhoods. Residents in the trial zone were more likely to prioritise reduced congestion than those outside the trial zone (79% vs 66% respectively).

Businesses generally agreed that these would benefit their local neighbourhood.

Improved air quality was the third mostly commonly selected benefit according to both residents in the trial zone (72% and in the rest of the borough (64%).

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Increased trees and greening	78%	79%	67%	76%
Reduced congestion	66%	79%	56%	66%
Improved air quality	64%	72%	46%	57%
Safer walking and cycling routes	58%	63%	44%	47%
More outdoor play features	57%	56%	53%	50%
Reduced traffic speeds	43%	52%	39%	36%
Reducing the amount of public space devoted to cars to make more room for markets, leisure, cafes etc.	38%	44%	31%	36%
More opportunities for street theatre and arts and street parties	38%	41%	39%	29%

What the neighbourhood would not benefit from

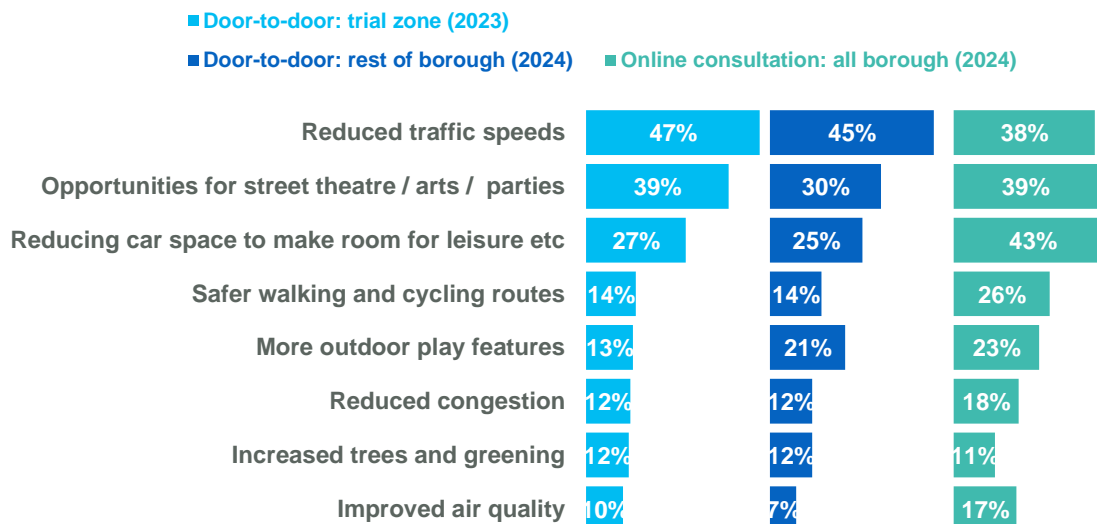
A large minority of residents think that reducing traffic speeds is unlikely to benefit their local neighbourhood

Reduced traffic speeds were perceived as having the highest lack of benefit across all surveys, with 47% in the 2023 trial zone, 45% in the 2024 rest of borough, and 38% in the online consultation.

Reducing public space devoted to cars was viewed as not beneficial by 27% in the 2023 trial zone, with a slightly lower 25% in the 2024 rest of borough survey. It was much higher in the online consultation (43%). Safer walking and cycling routes, more outdoor play features, increased trees and greening, and reduced congestion were considered not beneficial by a smaller proportion of residents, with the percentages ranging from 11% to 18% across the surveys.

Improved air quality was seen as not beneficial by an even smaller percentage, 10% in the 2023 trial zone and 7% in the the 2024 rest of borough surveys, and 17% in the online consultation. However, opportunities for street theatre, arts, and parties saw a significant increase in perceived lack of benefit in the online consultation at 39%, and the same in the trial zone survey (39%) compared to 30% in the 2024 rest of borough survey.

Do you think your neighbourhood would not benefit from each of the following possible changes?





According to the online consultation, the residents disagreed on what would not bring a benefit to their local area. Most commonly they thought reducing the amount of public space devoted to cars to make more room for things like markets, leisure, and cafes would not benefit their local area. Businesses tended to agree.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Reducing the amount of public space devoted to cars to make more room for markets, leisure, cafes etc.	45%	38%	53%	53%
More opportunities for street theatre and arts and street parties	41%	35%	35%	43%
Reduced traffic speeds	42%	32%	47%	50%
Safer walking and cycling routes	28%	22%	36%	34%
More outdoor play features	23%	22%	26%	29%
Reduced congestion	20%	12%	29%	19%
Improved air quality	18%	14%	30%	22%
Increased trees and greening	11%	11%	17%	14%

Local interest in specific products

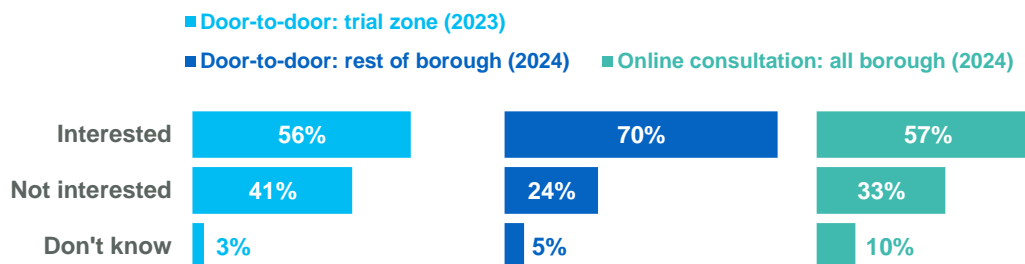
Installing green energy products such as solar panels

There is relatively broad interest in installing green energy products, which increases with financial incentivisation

Interest in installing green energy products was highest during the 2024 door-to-door survey in the rest of the borough, with 70% of residents showing interest. The 2023 door-to-door trial zone survey and the 2024 online consultation both recorded a 56% and 57% interest level, respectively.

The 2024 door-to-door survey reported the lowest percentage of residents not interested at nearly a quarter (24%) compared to 41% in the 2023 trial zone and a third (33%) in the 2024 online consultation. Indecision was highest in the online consultation at 10% (one tenth).

How interested, or not, would you be in each of the following? Installing green energy products in your home such as solar panels

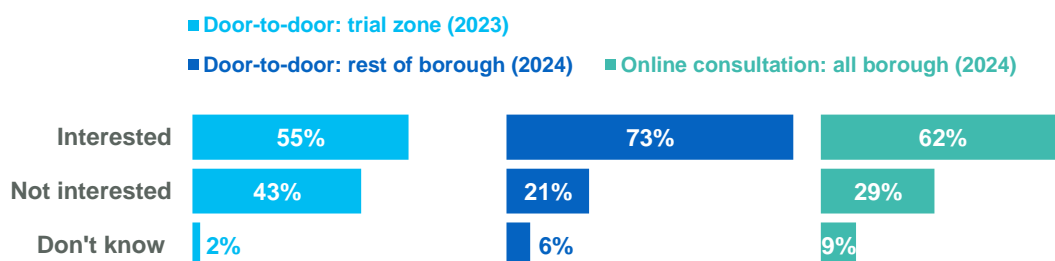


According to the online consultation, both residents and businesses were interested in installing solar panels, with a minority of between three and four in ten not interested.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Interested	59%	56%	54%	52%
Not interested	32%	33%	35%	40%
Don't know	9%	11%	11%	9%

Interest in installing green energy products was higher when a finance scheme was available, with the exception of the door-to-door survey in the trial zone. The 2024 door-to-door survey in the rest of the borough showed the highest interest at three quarters (73%), followed by the 2024 online consultation with 62% interested. The 2023 door-to-door trial zone survey reported 55% interest. Regarding the lack of interest, the 2024 rest of borough survey had the lowest at 21% (about one fifth), the online consultation had 29%, and the 2023 trial zone survey had 43%.

How interested, or not, would you be in each of the following? Installing green energy products in your home such as solar panels if there was a finance scheme available



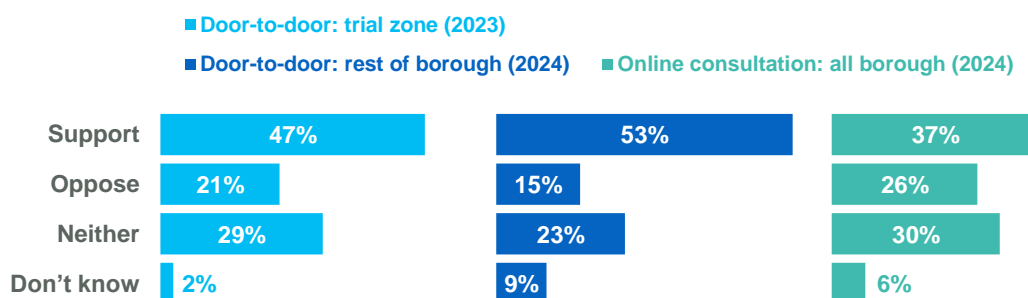
All groups in the online consultation showed a small uptick in interested if a finance scheme was available to help them install solar panels.

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Interested	63%	60%	64%	55%
Not interested	28%	30%	30%	34%
Don't know	8%	10%	6%	10%

A ban on wood burning stoves in urban areas

In the 2023 door-to-door trial zone survey, almost half (47%) supported the ban, while 21% opposed it. In the 2024 door-to-door rest of borough survey, support for the ban slightly decreased to 53%, with only 15% opposed and 9% unsure. The online consultation in 2024 showed 37% support for the ban, a lower figure compared to the door-to-door surveys, with higher opposition at 26%.

To what extent would you support or oppose banning wood burning stoves in cities and large towns?



According to the online consultation, there was more limited support for the banning of wood burning stoves in urban areas than was apparent in the door-to-door surveys. There was a small plurality in support of this amongst residents in the trial zone (35% support vs 26% oppose) and in the rest of the borough (39% support vs 27% oppose).

CONSULTATION:	RESIDENTS (REST OF BOROUGH)	RESIDENTS (TRIAL ZONE)	BUSINESSES (REST OF BOROUGH)	BUSINESSES (TRIAL ZONE)
Support	39%	35%	43%	33%
Oppose	27%	26%	19%	24%
Neither	30%	32%	35%	33%
Don't know	5%	8%	3%	10%



Annex: Questionnaire

The question text used within the survey

N.B. Small differences may exist between the precise wording between the 2023 and 2024 phases of research, but where compared in the report this is where there was either no change or this had a negligible effect on comparability. Wording below is from the 2024 phase of the research.

Q1: How interested, or not, would you be in each of the following?

Installing green energy products in your home such as solar panels"

Installing green energy products in your home such as solar panels if there was a finance scheme available"

Q2: To what extent would you support or oppose banning wood burning stoves in cities and large towns?

Q3: Out-of-borough traffic means vehicles which are just driving through your neighbourhood without stopping to shop, work or visit friends and family. Road vehicles are currently the single largest cause of air pollution in London. In general, would you say you support or oppose schemes to tackle air pollution and congestion by reducing the amount of out-of-borough traffic using neighbourhood streets as cut-throughs?

Q4a: And do you support the idea of these schemes for any of these reasons?

Q4b: And do you oppose the idea of these schemes for any of these reasons?

Q5: Schemes to cut pollution by reducing the amount of traffic using neighbourhood streets can be designed in different ways.

Please tell us whether you support or oppose each method being used to enforce traffic rules

- Using physical barriers which close streets to all cars, including residents
- Using smart technology cameras to identify and fine out-of-borough traffic using the area as a short cut, while giving free access to residents and genuine visitors, including deliveries

Q6: To what extent do you agree or disagree with the following statement: "Air pollution is a significant public health issue"



OPINIUM RESEARCH

58 Great Sutton St
London, EC1V 0DG
T +44 (0)20 7566 3190
helloUK@opinium.com



Q7: Do you think your neighbourhood would or wouldn't benefit from each of the following possible changes?

Improved air quality

Reduced congestion

Reduced traffic speeds

Increased trees and greening

Reducing the amount of public space devoted to cars to make more room for markets, leisure, cafes etc.

Safer walking and cycling routes

More opportunities for street theatre and arts and street parties"

More outdoor play features"

Report end.



About Opinium

OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people **think, feel** and **do**. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

www.opinium.com | research@opinium.com | 0207 566 3190

