

# Road map to zero: The transition to 100% Zero Emission Buses, what it means for people, and the journey to get there.



Client: Stagecoach

Fieldwork dates: 12/11/21 to 15/11/21

Interview method: Online

Population effectively sampled: 2021 UK adults aged 18+

**Online sampling method:** A nationally representative sample was selected at random from the LUCID marketplace and the sample was selected in proportion to population distribution.

Sample size: 2,217

**Data weighting:** Data was weighted to the profile of all adults aged 18+. Data was weighted by sex, region, and age. Targets for the weighted data were derived from the Office for National Statistics.

**Presentation of questions:** The computer tables attached in PDF format show each question, in full, in the order they were put to respondents, including all response codes and the bases for all demographics.

In all questions where the responses are a list of parties, names, or statements, these will typically have been displayed to respondents in a randomising order.

Questions where there is a 'natural order' to responses (e.g., numerical responses, ordinal scales such as 'strongly disagree' to 'strongly agree', or factual questions (e.g., demographics) will not have been randomised.

Some questions may not have been asked to all respondents, for example in cases where they were filtered based on answers to previous questions to ensure that respondents were only asked relevant questions. This will affect the base size of the question.

**Further enquiries:** [research@wacomms.co.uk](mailto:research@wacomms.co.uk)

**British Polling Council:** WA Communications is a member of the British Polling Council and abides by its rules <https://www.britishpollingcouncil.org/>

Q4. How often do you use local bus services, if at all?

Column %	Gender		Age						
	Total	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Never	23%	23%	22%	15%	16%	14%	24%	29%	34%
A few times a year or less often	28%	28%	28%	20%	20%	28%	25%	29%	39%
About once a month	9%	8%	11%	11%	13%	10%	11%	7%	6%
A few times a month	12%	12%	13%	18%	10%	15%	16%	12%	6%
Once or twice a week	14%	16%	13%	15%	22%	16%	13%	10%	10%
A few times a week or more often	13%	13%	13%	22%	18%	17%	12%	13%	4%
Non-bus user	51%	51%	50%	35%	37%	42%	49%	58%	73%
Bus user	49%	49%	50%	66%	63%	58%	51%	42%	27%
Base n	2,217	1,037	1,162	200	405	373	418	375	438

Q8. Overall, how do you feel about your local bus company/ies?

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
1 - Very bad impression	5%	7%	3%	9%	4%	2%	2%	3%	4%	5%	4%	6%	3%	6%	4%	6%	3%
2	3%	4%	3%	5%	3%	4%	3%	2%	2%	4%	2%	4%	3%	2%	3%	3%	4%
3	6%	9%	3%	8%	9%	4%	5%	2%	3%	6%	6%	7%	6%	5%	5%	7%	7%
4	7%	10%	4%	10%	9%	5%	6%	4%	3%	6%	8%	7%	9%	9%	6%	7%	6%
5	13%	17%	9%	18%	17%	10%	10%	8%	7%	10%	15%	14%	14%	14%	14%	11%	11%
6	11%	13%	8%	10%	15%	9%	11%	8%	6%	10%	11%	14%	13%	8%	12%	11%	8%
7	13%	11%	15%	9%	13%	16%	17%	14%	12%	14%	12%	17%	14%	14%	11%	11%	11%
8	17%	11%	24%	7%	14%	22%	22%	28%	21%	19%	16%	17%	14%	18%	19%	17%	18%
9	9%	4%	14%	1%	6%	13%	13%	13%	18%	11%	8%	6%	10%	9%	9%	10%	9%
10 - Very good impression	10%	4%	15%	3%	5%	13%	10%	17%	20%	9%	10%	9%	11%	10%	11%	7%	10%
NET Bad impression (1+2+3)	14%	19%	9%	23%	16%	11%	10%	6%	9%	16%	12%	17%	12%	13%	11%	17%	14%
NET Middling bad impression (4+5)	20%	27%	13%	28%	26%	14%	16%	11%	11%	17%	23%	21%	23%	23%	19%	18%	17%
NET Middling good impression (6+7)	23%	24%	23%	19%	27%	25%	28%	22%	18%	24%	23%	30%	26%	22%	23%	23%	20%
NET Good impression (8+9+10)	36%	19%	53%	12%	25%	49%	45%	58%	60%	38%	35%	31%	35%	37%	39%	34%	38%
I have no opinion of them	7%	11%	2%	18%	5%	1%	1%	3%	3%	5%	7%	2%	3%	5%	7%	8%	11%
Average	6.3	5.4	7.2	4.9	5.8	7.0	6.8	7.4	7.4	6.4	6.3	6.1	6.4	6.3	6.5	6.1	6.5
Base n	2,072	997	1,075	413	584	207	270	307	291	981	1,075	196	391	354	388	346	389

Q9. As part of the UK trying to reach net-zero carbon emissions, bus companies are being asked by the government to replace traditional diesel buses with zero-emission buses (either electric or hydrogen powered). What impact, if any, do you think a move to zero-emission buses would have on the following things?

The amount of bus services at evenings and weekends

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Get much better	9%	5%	13%	5%	5%	8%	10%	15%	17%	10%	8%	14%	12%	12%	9%	6%	4%
Get a bit better	15%	10%	19%	7%	12%	20%	19%	18%	20%	14%	15%	21%	20%	21%	11%	10%	8%
Make no difference	50%	56%	45%	53%	58%	47%	47%	45%	40%	52%	49%	34%	42%	42%	55%	61%	60%
Get a bit worse	12%	11%	13%	11%	12%	14%	13%	10%	13%	11%	12%	15%	16%	13%	11%	9%	9%
Get much worse	6%	7%	4%	9%	5%	6%	5%	3%	4%	7%	5%	9%	5%	5%	6%	6%	6%
NET Better	23%	15%	32%	12%	17%	27%	30%	34%	37%	24%	23%	35%	32%	33%	20%	16%	12%
NET Worse	18%	18%	17%	20%	17%	21%	18%	14%	17%	18%	17%	24%	20%	17%	17%	15%	15%
Don't know	9%	11%	6%	15%	8%	5%	5%	8%	6%	7%	11%	9%	6%	8%	8%	8%	13%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

Q9. As part of the UK trying to reach net-zero carbon emissions, bus companies are being asked by the government to replace traditional diesel buses with zero-emission buses (either electric or hydrogen powered). What impact, if any, do you think a move to zero-emission buses would have on the following things?  
How punctual and reliable services were

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Get much better	9%	4%	15%	3%	5%	12%	11%	17%	18%	10%	9%	16%	14%	13%	9%	6%	3%
Get a bit better	15%	11%	19%	8%	13%	16%	21%	22%	18%	16%	14%	21%	20%	20%	11%	14%	9%
Make no difference	56%	62%	49%	61%	64%	53%	52%	46%	47%	57%	55%	39%	41%	47%	63%	65%	71%
Get a bit worse	8%	8%	9%	7%	8%	11%	10%	7%	9%	6%	10%	13%	14%	8%	9%	5%	5%
Get much worse	5%	6%	4%	8%	3%	4%	4%	3%	3%	5%	4%	8%	6%	5%	4%	3%	3%
NET Better	24%	15%	34%	11%	18%	28%	31%	39%	36%	26%	23%	36%	33%	32%	20%	19%	13%
NET Worse	13%	13%	13%	15%	11%	15%	14%	10%	13%	12%	14%	20%	20%	13%	13%	8%	7%
Don't know	7%	10%	4%	13%	7%	4%	3%	5%	4%	5%	9%	6%	6%	8%	5%	7%	10%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

Q9. As part of the UK trying to reach net-zero carbon emissions, bus companies are being asked by the government to replace traditional diesel buses with zero-emission buses (either electric or hydrogen powered). What impact, if any, do you think a move to zero-emission buses would have on the following things?

How frequent services were

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Get much better	10%	5%	15%	4%	5%	10%	14%	15%	18%	10%	9%	17%	13%	13%	9%	6%	5%
Get a bit better	15%	10%	21%	7%	12%	21%	18%	26%	20%	16%	15%	23%	20%	23%	14%	11%	7%
Make no difference	51%	59%	44%	58%	59%	44%	48%	41%	41%	53%	50%	30%	42%	43%	54%	63%	64%
Get a bit worse	11%	10%	12%	10%	11%	17%	12%	9%	11%	10%	12%	15%	14%	10%	11%	9%	9%
Get much worse	5%	6%	4%	9%	4%	3%	5%	3%	4%	6%	4%	7%	6%	5%	6%	4%	5%
NET Better	25%	15%	36%	11%	18%	31%	32%	41%	38%	26%	25%	39%	32%	35%	23%	17%	12%
NET Worse	16%	17%	16%	19%	15%	20%	17%	12%	15%	16%	16%	22%	20%	15%	17%	12%	14%
Don't know	7%	10%	5%	12%	8%	5%	3%	6%	5%	5%	10%	9%	6%	7%	5%	8%	10%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

Q9. As part of the UK trying to reach net-zero carbon emissions, bus companies are being asked by the government to replace traditional diesel buses with zero-emission buses (either electric or hydrogen powered). What impact, if any, do you think a move to zero-emission buses would have on the following things?  
What it was like to be on the bus

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Get much better	14%	8%	19%	8%	8%	15%	21%	21%	19%	14%	13%	14%	14%	17%	14%	13%	11%
Get a bit better	25%	23%	28%	19%	26%	23%	26%	32%	27%	26%	24%	26%	30%	20%	27%	26%	23%
Make no difference	46%	50%	41%	48%	52%	44%	43%	36%	42%	47%	45%	38%	40%	47%	45%	49%	52%
Get a bit worse	5%	5%	5%	5%	5%	11%	4%	3%	4%	5%	5%	10%	6%	5%	5%	4%	3%
Get much worse	4%	5%	4%	7%	3%	5%	3%	4%	3%	4%	4%	7%	6%	5%	4%	3%	2%
NET Better	39%	31%	47%	27%	34%	38%	47%	53%	46%	40%	37%	40%	44%	38%	40%	38%	33%
NET Worse	9%	10%	8%	11%	8%	15%	7%	7%	6%	8%	9%	17%	12%	9%	8%	7%	5%
Don't know	7%	9%	4%	14%	6%	3%	3%	4%	5%	4%	9%	6%	4%	6%	6%	6%	10%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

Q9. As part of the UK trying to reach net-zero carbon emissions, bus companies are being asked by the government to replace traditional diesel buses with zero-emission buses (either electric or hydrogen powered). What impact, if any, do you think a move to zero-emission buses would have on the following things?  
The air quality locally

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Get much better	32%	29%	35%	27%	30%	30%	32%	37%	40%	30%	34%	29%	32%	30%	36%	34%	30%
Get a bit better	34%	34%	34%	32%	36%	35%	39%	32%	32%	35%	33%	28%	28%	35%	33%	36%	42%
Make no difference	21%	23%	19%	23%	23%	16%	20%	22%	18%	23%	20%	23%	22%	23%	21%	21%	19%
Get a bit worse	5%	4%	5%	4%	4%	12%	4%	4%	3%	5%	4%	9%	8%	4%	4%	3%	2%
Get much worse	4%	4%	3%	5%	3%	3%	3%	4%	2%	4%	3%	8%	5%	5%	3%	2%	1%
NET Better	66%	63%	70%	59%	66%	65%	72%	68%	73%	65%	67%	56%	61%	65%	69%	70%	72%
NET Worse	8%	8%	8%	9%	7%	15%	7%	8%	6%	9%	7%	17%	13%	9%	7%	5%	3%
Don't know	4%	6%	2%	9%	4%	4%	1%	2%	3%	3%	5%	5%	4%	3%	3%	4%	6%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438



Q10. And what impact, if any, do you think a move to zero-emission buses would have on the cost of fares?

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Much more expensive	17%	21%	13%	24%	18%	13%	12%	12%	15%	16%	17%	11%	13%	15%	18%	23%	17%
A bit more expensive	45%	47%	43%	47%	46%	44%	47%	43%	39%	44%	46%	41%	44%	40%	45%	45%	53%
The same	29%	26%	32%	22%	29%	28%	30%	33%	35%	30%	28%	26%	30%	34%	28%	27%	27%
A bit cheaper	7%	6%	9%	5%	6%	11%	8%	9%	8%	8%	7%	16%	11%	10%	7%	4%	2%
Much cheaper	2%	1%	3%	3%	0%	3%	3%	3%	3%	2%	2%	7%	2%	2%	3%	1%	1%
NET More expensive	62%	67%	56%	71%	64%	58%	59%	55%	54%	60%	64%	52%	57%	55%	62%	69%	70%
NET Cheaper	9%	7%	12%	7%	7%	14%	11%	12%	11%	10%	9%	23%	13%	11%	9%	5%	3%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

Q11. Overall, which of the following statements best describes your view on a move to zero-emission buses?

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
A very bad thing	4%	4%	4%	5%	3%	5%	3%	4%	3%	5%	3%	6%	4%	5%	3%	4%	3%
A fairly bad thing	7%	6%	7%	5%	7%	10%	7%	7%	7%	7%	6%	17%	13%	5%	5%	2%	3%
Neither good nor bad	23%	24%	23%	28%	21%	23%	23%	21%	24%	21%	25%	25%	27%	28%	22%	22%	18%
A fairly good thing	33%	33%	34%	31%	34%	37%	34%	34%	31%	32%	35%	33%	34%	33%	37%	32%	31%
A very good thing	33%	33%	32%	32%	35%	24%	33%	34%	35%	35%	31%	20%	21%	29%	34%	40%	46%
NET Good	66%	66%	66%	63%	69%	61%	67%	68%	66%	67%	65%	53%	56%	62%	71%	72%	76%
NET Bad	11%	10%	11%	10%	10%	15%	10%	11%	10%	12%	9%	23%	17%	10%	7%	6%	6%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

Q12. Put yourself in the shoes of a bus company. How hard or easy do you think they will find a move to zero-emission buses?

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Very hard	16%	20%	12%	21%	19%	11%	14%	10%	11%	16%	15%	11%	13%	13%	14%	20%	20%
Fairly hard	37%	40%	33%	40%	40%	39%	31%	36%	28%	37%	37%	29%	34%	34%	36%	34%	47%
Middling	31%	28%	33%	27%	29%	29%	36%	31%	36%	28%	32%	37%	32%	34%	34%	27%	23%
Fairly easy	13%	9%	16%	8%	10%	15%	15%	18%	16%	14%	12%	21%	15%	14%	11%	15%	7%
Very easy	4%	3%	6%	4%	2%	5%	3%	6%	9%	5%	4%	4%	6%	5%	5%	3%	3%
NET Hard	52%	60%	45%	61%	59%	51%	46%	45%	39%	53%	52%	39%	47%	47%	50%	54%	67%
NET Easy	17%	12%	22%	12%	13%	20%	18%	24%	25%	19%	16%	24%	21%	19%	16%	18%	10%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

The average bus has a service life of around 15 years. For a diesel bus this means an initial cost of £200k with annual fuel cost of around £25k, giving a total cost of £575k over the 15 years. For an electric bus there is an initial cost of £350k, with a new battery costing £150k half way and annual fuel (electricity) cost of £12k, giving a total cost of £680k. The maintenance costs of an electric bus are likely to be less than a diesel bus but the total cost of ownership for an electric bus is thought to be about 20% more than its diesel equivalent, depending on how many miles it does each year. If all diesel buses were replaced with zero-emission buses, the UK's total carbon footprint would be reduced by about 1.5%.

Q13. How do you feel about the following statements?  
The environmental benefit for using a zero-emission bus outweighs its higher overall lifetime

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Strongly disagree	5%	6%	4%	7%	5%	5%	4%	3%	3%	6%	3%	4%	4%	5%	5%	4%	5%
Disagree	7%	7%	7%	8%	7%	8%	8%	7%	5%	7%	7%	7%	7%	5%	6%	8%	10%
Indifferent	17%	17%	17%	17%	16%	19%	18%	14%	16%	16%	17%	19%	22%	17%	17%	15%	12%
Agree	37%	36%	38%	32%	40%	36%	41%	38%	36%	38%	36%	37%	36%	39%	37%	35%	38%
Strongly agree	24%	21%	27%	20%	23%	24%	23%	28%	33%	26%	23%	22%	24%	25%	26%	26%	23%
NET Disagree	12%	13%	11%	15%	12%	13%	13%	10%	7%	13%	10%	11%	11%	10%	11%	13%	15%
NET Agree	61%	58%	65%	52%	62%	60%	64%	66%	69%	63%	60%	59%	60%	64%	63%	61%	61%
Don't know enough to comment	10%	13%	8%	16%	10%	7%	6%	10%	7%	7%	13%	11%	7%	10%	9%	11%	13%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

The range of zero-emission buses is a fair bit lower than diesel buses at the moment. In order to offer the same service as currently, bus companies would need to have more vehicles (and larger depots) so enough could be in service while others charged.

Q14. To what extent, if at all, should this affect the roll-out of zero-emission buses?

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
This seems like a big problem – they don’t seem viable until the range can match diesel buses	37%	41%	33%	44%	39%	34%	30%	36%	31%	39%	35%	24%	34%	30%	37%	42%	48%
This seems like a small problem – but with the right plans in place it shouldn’t stop zero-emission buses from happening soon	52%	49%	56%	44%	53%	54%	61%	54%	56%	50%	55%	63%	54%	58%	53%	49%	44%
This doesn’t seem like a problem at all – it just sounds like excuses	11%	10%	11%	11%	9%	12%	9%	10%	13%	11%	10%	14%	12%	12%	10%	10%	8%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438

Q16. Whose responsibility should it be to pay for a transition to zero-emission buses? You have 10 points to allocate, please give more points to those who have more responsibility and less (or none)

Row %	Missing + 0	1	2	3	4	5	6	7	8	9	10	Average
The government (through taxation)	10%	10%	18%	19%	14%	14%	5%	3%	2%	0%	4%	3.4
Bus companies	10%	14%	26%	21%	11%	9%	3%	2%	1%	0%	3%	2.9
Local councils	17%	19%	32%	19%	7%	4%	1%	0%	0%	0%	1%	2.0
Bus users (through fares)	26%	34%	23%	8%	4%	3%	1%	0%	0%	0%	1%	1.5

Q17. If fares rose because of investment in zero-emission buses, at what level would you start to use the bus less?

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
A 10% increase (e.g. a £2 fare going up to £2.20)	34%	39%	31%	NA	39%	28%	31%	34%	30%	33%	35%	25%	33%	36%	35%	34%	35%
A 30% increase (e.g. a £2 fare going up to £2.60)	25%	28%	24%	NA	28%	29%	22%	22%	23%	28%	24%	23%	22%	27%	27%	30%	23%
A 50% increase (e.g. a £2 fare going up to £3.00)	17%	14%	19%	NA	14%	19%	21%	18%	17%	16%	17%	24%	22%	19%	14%	16%	10%
A 70% increase (e.g. a £2 fare going up to £3.40)	5%	3%	5%	NA	3%	6%	7%	4%	4%	4%	5%	8%	8%	4%	4%	2%	2%
A 100% increase (e.g. a £2 fare going up to £4.00)	3%	2%	3%	NA	2%	4%	3%	3%	2%	3%	3%	5%	3%	2%	3%	2%	1%
I'd pay whatever it cost as it would be worth it	5%	5%	5%	NA	5%	4%	6%	5%	5%	6%	5%	6%	4%	2%	5%	3%	12%
I have no alternative to the bus, so would just have to pay any increase	11%	9%	13%	NA	9%	10%	10%	13%	18%	10%	12%	8%	9%	8%	12%	14%	17%
Base n	1,711	616	1,095	0	616	209	272	315	299	795	901	171	340	321	318	266	290

Q20. Overall, how would you feel about your local bus company/ies if they only used zero-emission buses?

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
1 - Very bad impression	3%	4%	2%	5%	3%	2%	2%	3%	2%	3%	3%	5%	1%	4%	3%	4%	2%
2	2%	2%	2%	2%	2%	2%	3%	1%	1%	2%	1%	6%	2%	2%	3%	1%	0%
3	3%	3%	3%	3%	3%	5%	2%	3%	4%	3%	3%	7%	6%	3%	2%	1%	1%
4	3%	3%	3%	3%	4%	5%	4%	3%	2%	3%	4%	8%	4%	5%	2%	2%	2%
5	9%	9%	9%	9%	9%	10%	12%	7%	8%	8%	10%	12%	12%	12%	6%	7%	8%
6	8%	9%	8%	9%	9%	6%	7%	8%	9%	8%	9%	10%	12%	7%	7%	7%	7%
7	10%	9%	11%	10%	9%	10%	11%	9%	12%	11%	9%	14%	13%	10%	10%	9%	7%
8	15%	14%	16%	13%	16%	16%	15%	18%	14%	17%	14%	11%	15%	15%	16%	14%	18%
9	12%	12%	12%	11%	13%	12%	11%	13%	13%	12%	12%	9%	10%	13%	16%	13%	12%
10 - Very good impression	27%	25%	28%	23%	27%	26%	26%	30%	31%	26%	27%	17%	22%	22%	28%	33%	34%
NET Bad impression (1+2+3)	8%	8%	7%	9%	7%	10%	7%	8%	6%	8%	7%	17%	9%	10%	8%	6%	3%
NET Middling bad impression (4+5)	13%	13%	13%	13%	13%	15%	17%	9%	10%	12%	13%	19%	16%	17%	8%	10%	10%
NET Middling good impression (6+7)	18%	18%	18%	19%	18%	16%	19%	17%	21%	19%	18%	23%	25%	17%	18%	16%	13%
NET Good impression (8+9+10)	54%	51%	57%	47%	55%	55%	53%	60%	58%	55%	54%	36%	47%	50%	59%	60%	63%
Wouldn't matter to me at all	7%	9%	5%	12%	7%	4%	5%	6%	4%	6%	8%	5%	4%	6%	7%	9%	11%
Average	7.5	7.4	7.6	7.2	7.5	7.3	7.4	7.7	7.7	7.5	7.5	6.4	7.1	7.1	7.7	7.9	8.1
Base n	2,060	1,019	1,041	444	575	201	258	295	287	974	1,069	190	389	352	388	342	391



Q21. If zero-emission buses replaced diesel buses in your local area, with the same fares and schedule, do you think your use of buses would increase, decrease or remain the same?

Column %	Bus usage									Gender		Age					
	Total	Non-bus user	Bus user	Never	A few times a year or less often	About once a month	A few times a month	Once or twice a week	A few times a week or more often	Male	Female	18-24	25-34	35-44	45-54	55-64	65 and over
Increase a lot	6%	3%	8%	2%	4%	6%	6%	11%	9%	5%	6%	9%	9%	8%	3%	5%	2%
Increase a little	16%	14%	18%	9%	18%	21%	18%	19%	16%	17%	16%	22%	18%	20%	15%	13%	13%
Stay the same	58%	65%	52%	68%	62%	50%	52%	48%	57%	59%	58%	45%	48%	53%	60%	68%	70%
Decrease a little	6%	4%	8%	3%	5%	7%	11%	7%	7%	6%	6%	12%	9%	7%	6%	3%	2%
Decrease a lot	4%	3%	4%	3%	3%	7%	6%	3%	3%	4%	4%	6%	6%	3%	4%	3%	2%
Top 2 - Increase	22%	17%	27%	12%	22%	27%	24%	30%	25%	22%	21%	31%	26%	28%	18%	17%	16%
Bottom 2 - Decrease	10%	8%	13%	7%	8%	13%	16%	11%	10%	10%	10%	18%	16%	10%	10%	6%	4%
I couldn't say	10%	11%	9%	13%	8%	10%	8%	11%	7%	9%	11%	8%	10%	9%	12%	9%	11%
Base n	2,217	1,122	1,095	506	616	209	272	315	299	1,037	1,162	200	405	373	418	375	438