

September 2014

Consumer survey, Q3 2014

Report



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1 Summary of findings

This section provides a short summary of findings from a survey undertaken by Ipsos MORI on behalf of HS2 Ltd. during Quarter 3, 2014. The survey is part of a programme of consumer and business opinion research, and involved interviews with 2,331 adults in England and Wales (not in Scotland September's independence referendum). Fieldwork was undertaken by telephone between 29th August and 18th September 2014.

The data collected has been weighted by gender, age, working status and region at the analysis stage to match the known population profile. Full data tables are available under separate cover.

Key findings from the Q3 2014 survey are as follows:

- Seven in ten (71%) say they had heard of High Speed Two or HS2 before the interview; three in ten (29%) had not. Of those reporting having heard of HS2, a majority say they know 'not very much' or 'nothing at all about it'; 56% compared to the 44% combined who know either 'a great deal' or 'a fair amount'.
- Having been given a basic description of HS2, a higher proportion of people say they support it (32%) than oppose (21%). A quarter say they either *strongly* support HS2 (14%) or *strongly* oppose it (11%), however, the most common response is 'No views either way', given by 46%.
- A third (36%) think that 'overall, the costs will be greater than the benefits', although over half (54%) are of the view that either the benefits will be greater than the costs (22%) or that they will be about the same (32%).
- While most people think that HS2 will make no difference (either positively or negatively) to them personally or to their local area – 63% and 57% respectively – opinion across Britain is strongly positive about the difference the line would make to the British economy, to London, the Midlands and the North of England.
- The public agree rather than disagree that HS2 will directly create jobs and growth across the country (by 73% to 18%) and by a similar margin that it will do so by making it easier to travel between cities (72% to 20%). A majority *disagree* that HS2 is only likely to benefit London and the South East (61%).
- The public also agree rather than disagree that the railways are 'nearly full to bursting now', necessitating a new line connecting major cities (65% to 22%). While more agree than disagree that 'Britain can't afford to spend money on a High Speed Railway line right now' – 50% against 37% – 86% agree with the statement 'it is right that we spend money on national infrastructure even in tough economic conditions as the country still has to plan for the future'.
- There is also a strong sense that the transport network is not good enough and needs investment at both regional and national levels. Similarly, the public agree that jobs and apprenticeships are needed, and that the British economy needs rebalancing.
- While most people think it likely that HS2 will be built, far fewer think it will be built and ready within the current timetable or the current budget. By two to one (57% to 24%) the British think Britain 'has a poor record at getting national infrastructure projects right'.

2 Topline data

- On behalf of HS2 Ltd., Ipsos MORI conducted 2,331 interviews with adults in England and Wales aged 18+ by telephone.
- Fieldwork took place between 29th August and 18th September 2014.
- Data are weighted by gender, age, work status and region to reflect the adult population.
- Results are based on all respondents unless otherwise specified.
- The base size is indicated when a question was not asked of all respondents.
- An asterisk (*) indicates a figure smaller than 0.5% but greater than 0.
- A '-' indicates a figure of 0.
- Where percentages do not sum to 100, this is due to computer rounding, multiple responses or the exclusion of 'don't know' categories.
- Please note that where combinations are described in section 1 *Summary of findings* (e.g. the percentage agreeing with a statement) these reflect the combined raw numbers, and so may not be the same as the sum of the individual figures ('strongly agree' plus 'tend to agree') shown in the topline below.

Good morning/afternoon/evening. My name is and I'm calling from Ipsos MORI, the research organisation, and we are carrying out a survey about transport and travel in the UK. *Could you help by running through some questions at the moment, please?*

I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual in the results. The interview will be carried out according to the MRS Code of Conduct.

Q1.-Q3. (Gender, Age, Working Status) ASKED AS QUOTA QUESTIONS

Q4. Can I check, before this interview, had you heard of HS2, or not? By HS2 we mean High Speed Two.

| | % |
|----------------------|----|
| Yes, had heard of | 71 |
| No, had not heard of | 29 |
| Don't know/not sure | * |

Q5. In general, how much, if anything would you say you know about HS2?

Base: All heard of HS2 (1,675)

| | % |
|-------------------------------------|-----------|
| A great deal | 4 |
| A fair amount | 40 |
| Not very much | 51 |
| Nothing at all | 5 |
| Don't know | * |
| A great deal/fair amount | 44 |
| Not very much/nothing at all | 56 |

Q6. And still thinking about HS2, how much, if anything would you say you know about...?

Base: All heard of HS2 (1,488)

| | A great deal % | A fair amount % | Not very much % | Nothing at all % | Don't know % | A great deal/fair amount % | Not very much/nothing at all % |
|-----------------------------------|----------------|-----------------|-----------------|------------------|--------------|----------------------------|--------------------------------|
| a) ...its potential advantages | 4 | 39 | 43 | 12 | 2 | 43 | 55 |
| b) ...its potential disadvantages | 5 | 36 | 44 | 13 | 2 | 42 | 57 |

Q7. As you may know, High Speed Two, or HS2, is a scheme to build a High Speed Railway line linking London and Birmingham, extending to Leeds and Manchester.

Overall, to what extent do you personally support or oppose HS2, or do you have no views either way?

| | % |
|---------------------|-----------|
| Strongly support | 14 |
| Tend to support | 18 |
| No views either way | 46 |
| Tend to oppose | 10 |
| Strongly oppose | 11 |
| Don't know | 1 |
| Support | 32 |
| Oppose | 21 |

Q8. Have you definitely decided that this is your view on HS2, or is there a chance you may change your mind?

Base: All who express an opinion about HS2 (2,302)

| | % |
|--------------------|----|
| Definitely decided | 56 |
| May change my mind | 39 |
| Don't know | 5 |

Q9. You said that you [ANSWER AT Q7] HS2. Can you please tell me your reasons for this? What else?

| | % |
|---|----|
| Positive statements | |
| Travel will be faster / easier / better links to / from other areas / easier commute to work | 17 |
| Economic benefits / development / businesses will benefit / jobs will be created | 12 |
| It's good progress / forward-thinking / it's needed / modernisation / infrastructure is required | 6 |
| Improves connection / links / travel between cities / across the country / connects families / friends | 11 |
| HS2 will improve efficiency / effectiveness / passenger experience / make commuters lives easier / better | 4 |
| Will improve congestion / less cars on the road / car pollution | 4 |
| Better for the north-south divide / improved links to the north / south / north will benefit | 6 |
| High speed rail links have benefited other countries / need to keep up with other countries | 2 |
| Neutral statements | |
| I don't travel / use public transport often / won't use HS2 / would rather drive | 14 |
| Doesn't affect me / us / the area that I live in / not close by | 21 |
| I've never heard about it / don't know much / enough about it / I don't | 11 |

| | |
|---|----|
| have enough information | |
| No strong opinion / no reason / not interested / not thought about it / HS2 has pros and cons | 6 |
| | % |
| Negative statements | |
| Costs are / potentially will be too high - for commuters / construction / development / the taxpayer | 16 |
| Countryside / rural beauty will be destroyed / negative impact on the environment / wildlife | 11 |
| HS2 is not in the entire nation's interest / won't benefit me / my area / no advantage | 6 |
| Existing lines / infrastructure / networks should be improved instead / made better use of | 5 |
| HS2 (including building phase) will cause disruption / to transport services / areas / people's lives | 4 |
| Speed / reduction in travel times isn't significant / not enough to make it worthwhile | 5 |
| It's not needed | 4 |
| Other | 16 |
| Don't know | 2 |

Q10. If there was a HS2, a High Speed Railway line linking London, Birmingham, Leeds and Manchester, do you think it would make a positive or negative difference to each of the following?

| | Very positive difference % | Positive difference % | No difference % | Negative difference % | Very negative difference % | Don't know % | Positive difference % | Negative difference % |
|--------------------------------|----------------------------|-----------------------|-----------------|-----------------------|----------------------------|--------------|-----------------------|-----------------------|
| a) You personally | 5 | 21 | 63 | 6 | 3 | 2 | 26 | 9 |
| b) Your local area | 5 | 22 | 57 | 8 | 3 | 5 | 27 | 11 |
| c) London | 15 | 51 | 20 | 5 | 1 | 8 | 66 | 6 |
| d) The Midlands | 20 | 53 | 12 | 5 | 1 | 9 | 73 | 7 |
| e) The North of England | 20 | 48 | 16 | 6 | 1 | 8 | 69 | 8 |
| f) The British economy | 13 | 48 | 17 | 8 | 2 | 13 | 61 | 9 |

Q11. Overall, do you think the costs of building HS2, a High Speed Railway line linking London and Birmingham, extending to Leeds and Manchester, will be greater than the benefits, the benefits will be greater than the costs, or do you think the costs and benefits will be about the same?

| | |
|--|----|
| | % |
| Overall, the costs will be greater than the benefits | 36 |
| Overall, the benefits will be greater than the costs | 22 |
| The costs and benefits will be about the same | 32 |
| Don't know | 10 |

Q12. I am going to read out a number of statements some people have made about HS2, some for, some against. For each one, please tell me the extent to which you agree or disagree, or if you neither agree nor disagree?

| | Strongly agree % | Tend to agree % | Neither agree nor disagree % | Tend to disagree % | Strongly disagree % | Don't know % | Agree % | Disagree % |
|---|------------------|-----------------|------------------------------|--------------------|---------------------|--------------|---------|------------|
| a) HS2 will cause too much damage to the countryside | 27 | 23 | 10 | 23 | 10 | 7 | 51 | 32 |
| b) Britain can't afford to spend money on a High Speed Railway line right now | 30 | 20 | 8 | 23 | 15 | 5 | 50 | 37 |
| c) HS2 is only likely to benefit business travellers | 21 | 27 | 5 | 29 | 16 | 3 | 47 | 45 |
| d) HS2 is only likely to benefit those in London and the South East | 14 | 16 | 5 | 36 | 25 | 3 | 31 | 61 |
| e) Building and operating HS2 will directly create jobs and growth across the country | 33 | 41 | 6 | 10 | 7 | 3 | 73 | 18 |
| f) HS2 will create jobs and growth by making it easier to travel between Britain's cities | 34 | 38 | 6 | 11 | 8 | 2 | 72 | 20 |
| g) Better rail connections brought by HS2 will boost the economy beyond London and the South East | 25 | 37 | 7 | 15 | 10 | 5 | 62 | 25 |
| h) Britain's railways are nearly full to bursting now, so we need a new line to connect its major cities together | 34 | 31 | 8 | 13 | 10 | 5 | 65 | 22 |

Q13. How likely or unlikely do you think it is that the following will happen...?

| | Certain to happen % | Very likely to happen % | Fairly likely to happen % | Fairly unlikely to happen % | Very unlikely to happen % | Certain <u>not</u> to happen % | Don't know % | Likely to happen % | Unlikely to happen % |
|---|---------------------|-------------------------|---------------------------|-----------------------------|---------------------------|--------------------------------|--------------|--------------------|----------------------|
| a) HS2 will be built | 9 | 24 | 44 | 10 | 3 | 1 | 8 | 78 | 14 |
| b) The new HS2 project will be built and ready within the current timetable | 2 | 5 | 14 | 34 | 29 | 10 | 6 | 21 | 73 |
| c) The HS2 project will be delivered to the current budget | 1 | 4 | 11 | 28 | 31 | 17 | 6 | 17 | 77 |

Q14. How much do you agree or disagree with each of these statements?

| | Strongly agree % | Tend to agree % | Neither agree nor disagree % | Tend to disagree % | Strongly disagree % | Don't know % | Agree % | Disagree % |
|---|------------------|-----------------|------------------------------|--------------------|---------------------|--------------|---------|------------|
| a) Whether or not I used HS2 wouldn't matter to me, as long as it is a good thing for Britain | 40 | 40 | 6 | 6 | 6 | 3 | 80 | 12 |
| b) Whether or not I used HS2 wouldn't matter to me, as long as it is a good thing for <i>REGION</i> | 34 | 37 | 8 | 11 | 8 | 3 | 71 | 19 |
| c) If HS2 didn't go ahead I would worry that Britain would miss out on the opportunities it could bring | 16 | 21 | 11 | 28 | 20 | 3 | 38 | 48 |
| d) If HS2 didn't go ahead I would worry that <i>REGION</i> would miss out on the opportunities it could bring | 16 | 22 | 10 | 28 | 21 | 4 | 37 | 49 |

Q15. Earlier, you said you [ANSWER FROM Q7] ... (about) HS2. Which, if any, of these would be most likely to encourage you to support HS2?

Base: All who oppose HS2 or have no views either way (1,564)

| | % |
|--|----|
| If HS2 was going to be affordable for people like you to use it | 54 |
| The location of HS2's stations | 38 |
| If HS2 was going to create local job opportunities | 57 |
| If HS2 was going to make a positive difference to the national economy | 60 |
| If you thought HS2 was value for money | 51 |
| None of these | 13 |
| Other | 2 |

Q16. Which of these best describes how well informed you feel about HS2?

| | % |
|--|----|
| I have all the information I want | 40 |
| I have some information but would like to know more | 24 |
| I have no information but would like to receive some | 10 |
| I have no information and don't want to receive any | 24 |
| Don't know | 2 |
| I would like more information | 34 |
| I don't want any more information | 64 |

Q17. Which two or three, if any, of these would you most trust to explain the advantages and disadvantages of the HS2 project for *REGION*, or would you trust none of them?

| | % |
|----------------------|----|
| Government ministers | 9 |
| HS2 Ltd. | 18 |
| Local MPs | 16 |
| Local media | 23 |
| Local councillors | 16 |
| Campaign groups | 18 |
| Technical experts | 50 |
| None of these | 22 |

Q18. Now for some questions about the economy. For each statement, please tell me much you agree or disagree...

| | Strongly agree % | Tend to agree % | Neither agree nor disagree % | Tend to disagree % | Strongly disagree % | Don't know % | Agree % | Disagree % |
|---|------------------|-----------------|------------------------------|--------------------|---------------------|--------------|---------|------------|
| a) Britain needs more jobs and apprenticeships to be created | 75 | 20 | 1 | 1 | 3 | 1 | 94 | 4 |
| b) <i>REGION</i> needs more jobs and apprenticeships to be created | 68 | 22 | 2 | 4 | 3 | 2 | 90 | 7 |
| c) The British economy needs to be rebalanced so that it is not so dominated by London and the South East | 55 | 26 | 6 | 7 | 4 | 2 | 81 | 12 |

Q19. Now for some statements about infrastructure. By infrastructure I mean, things we rely on like road, rail, utilities, housing, broadband and other communications. For each statement, please tell me much you agree or disagree...

| | Strongly agree % | Tend to agree % | Neither agree nor disagree % | Tend to disagree % | Strongly disagree % | Don't know % | Agree % | Disagree % |
|---|------------------|-----------------|------------------------------|--------------------|---------------------|--------------|---------|------------|
| a) It is right that we spend money on national infrastructure, even in tough economic conditions, as the country still has to plan for the future | 48 | 39 | 4 | 5 | 3 | 2 | 86 | 8 |
| b) Britain has a poor record at getting national infrastructure projects right | 26 | 31 | 11 | 19 | 5 | 8 | 57 | 24 |

Q20. Finally, now for some statements about transport infrastructure. By transport infrastructure I mean road and rail networks such as motorways, train lines and stations. For each statement, please tell me much you agree or disagree...

| | Strongly agree % | Tend to agree % | Neither agree nor disagree % | Tend to disagree % | Strongly disagree % | Don't know % | Agree % | Disagree % |
|---|------------------|-----------------|------------------------------|--------------------|---------------------|--------------|---------|------------|
| a) Britain's transport network is good enough and does <u>not</u> need new investment | 5 | 8 | 4 | 37 | 44 | 3 | 13 | 81 |
| b) <i>REGION's</i> transport network is good enough and does <u>not</u> need new investment | 5 | 10 | 5 | 34 | 42 | 3 | 16 | 76 |

Q21. Thinking about the past month or so, which, if any, of the following have you personally done by train in Britain, or have you done none of these...?

| | % |
|---|-----------|
| Travelled to or from work | 18 |
| Travelled on business | 16 |
| Travelled for leisure | 49 |
| None of these | 44 |
| Don't know | * |
| Travel by train at all in past month | 56 |

Q22. Social grade

| | % |
|---------|----|
| A | 5 |
| B | 22 |
| C1 | 31 |
| C2 | 18 |
| D | 7 |
| E | 9 |
| Refused | 7 |

Q1. Gender

| | Weighted % | Unweighted % |
|--------|------------|--------------|
| Male | 49 | 44 |
| Female | 51 | 56 |

Q2. Age

| | Weighted % | Unweighted % |
|--------------|------------|--------------|
| 18-24 | 16 | 13 |
| 25-34 | 12 | 11 |
| 35-44 | 12 | 12 |
| 45-54 | 23 | 23 |
| 55-59 | 8 | 9 |
| 60-64 | 8 | 9 |
| 65-69 | 8 | 8 |
| 70+ | 14 | 13 |
| Refused | * | * |
| 18-34 | 28 | 24 |
| 35-54 | 35 | 35 |
| 55+ | 37 | 40 |

Q3. Working status

| | Weighted | Unweighted |
|--------------------------------|-----------------|-------------------|
| | % | % |
| Working - full-time (30+ hrs) | 42 | 43 |
| Working - part-time (9-29 hrs) | 14 | 16 |
| Unemployed - seeking work | 3 | 2 |
| Unemployed - not seeking work | 4 | 3 |
| Not working | 22 | 20 |
| Other | 16 | 14 |
| Don't know | * | * |
| Working | 56 | 60 |
| Not working | 44 | 40 |

Region (from sample)

| | Weighted | Unweighted |
|-----------------------|-----------------|-------------------|
| | % | % |
| East Midlands | 9 | 11 |
| Eastern | 10 | 8 |
| London | 15 | 16 |
| North East | 5 | 4 |
| North West | 13 | 14 |
| South East | 15 | 12 |
| South West | 9 | 7 |
| Wales | 5 | 4 |
| West Midlands | 10 | 12 |
| Yorkshire and Humber | 9 | 12 |
| 'Affected' | 56 | 66 |
| 'Non-affected' | 44 | 34 |

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