

June 2014

Consumer survey, Q2 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 2 2014. The survey is part of a programme of consumer and business opinion research and involved interviews with 1,000 British adults. Fieldwork was undertaken by telephone between 23rd May and 8th June 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. Trend data is also available for some of the questions because several surveys have been undertaken on behalf of HS2 Ltd. at various points during 2013 and 2014. Those surveys have, however, used different methods and question formulations and this Quarter 2 (Q2) 2014 survey will act as a new baseline moving forward.

Key findings from the Q2 2014 survey are as follows:

- Just under a third, 31%, say they had not heard of High Speed Two or HS2 before the interview.
- Of those who report having heard of HS2 a slim majority say they know 'not very much' or 'nothing at all about it'; 53% compared to the 47% 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 (28%) than oppose (24%). A quarter say they either *strongly* support HS2 (12%) or *strongly* oppose it (13%), however, the most common response is 'No views either way', given by 46%.
- Four in ten (40%) think that 'overall, the costs will be greater than the benefits', although just under half, 49%, are of the view that either the benefits will be greater than the costs (20%) or that they will be about the same (29%).
- While most people think that HS2 will make no difference (either positively or negatively) to them personally or to their local area – 69% and 61% respectively – opinion across Britain is strongly positive about the difference the line would make to the British economy, to London, the Midlands and North of England.
- There is a strong sense that the UK's current road and rail network is congested and struggling to cope – 46% strongly agree and a further 29% tend to agree. Similarly, by strong margins people tend to agree rather than disagree that the railways are 'nearly full to bursting now' necessitating a new line connecting major cities.
- The public agree rather than disagree that HS2 will directly create jobs and growth across the country (by 68% to 21%) and by a similar margin that it will do so by making it easier to travel between cities. By a margin of just over two to one (59% to 27%), the public agree that HS2 will boost the economy outside London and the South East.
- The public are relatively more negative about the damage to the countryside; 51% agree there will be "too much damage" while 34% disagree. More agree than disagree that "Britain can't afford to spend money on a High Speed Railway line right now" – 52% against 37%. People are relatively more divided on the likelihood of HS2 only benefiting business travellers; 49% agree while 42% disagree.

2 Topline data

- On behalf of HS2 Ltd., Ipsos MORI conducted 1,000 interviews with British adults aged 18+ by telephone.
- Fieldwork took place between 23rd May and 8th June 2014.
- Data are weighted by gender, age, work status and region to reflect the British 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 issues. *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	69
No, had not heard of	31
Don't know/not sure	*

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

Base: All heard of HS2 (692)

	%
A great deal	6
A fair amount	41
Not very much	48
Nothing at all	4
Don't know	*

High Speed Rail 2, called HS2, is a planned new North-South high speed railway line and train service between London and Birmingham, through to Manchester in the West and Leeds in the East. It is designed to improve connections between 8 out of 10 of Britain's biggest cities.

- Q6. Overall, to what extent do you personally support or oppose HS2, or do you have no views either way?

	%
Strongly support	12
Tend to support	16
No views either way	46
Tend to oppose	11
Strongly oppose	13
Don't know	2

- Q7. Overall, do you think the costs of building 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	40
Overall, the benefits will be greater than the costs	20
The costs and benefits will be about the same	29
Don't know	11

- Q8. Firstly... If there was 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 %
a)	You personally	5	16	69	5	4	1
b)	Your local area	5	20	61	6	5	3
c)	London	18	45	24	6	1	6
d)	The Midlands	15	49	18	8	1	9
e)	The North of England	16	47	20	8	2	7
f)	The British Economy	10	41	24	11	4	9

- Q9. I am going to read out a number of statements some people have made about HS2, some in favour, some against. For each one, please tell me the extent to which you agree or disagree, or if you neither agree nor disagree? Firstly...

		Strongly agree %	Tend to agree %	Neither agree nor disagree %	Tend to disagree %	Strongly disagree %	Don't know %
a)	HS2 will cause too much damage to the countryside	30	22	10	23	11	5
b)	Britain can't afford to spend money on a High Speed Railway line right now	32	20	7	21	15	5
c)	HS2 is only likely to benefit business travellers	24	25	6	28	14	2
d)	HS2 is only likely to benefit those in London and the South East	16	18	6	33	25	2
e)	Building and operating HS2 will directly create jobs and growth across the country	30	39	8	13	8	3
f)	HS2 will create jobs and growth by making it easier to travel between our cities	32	37	7	13	9	2
g)	Better rail connections brought by HS2 will boost the economy beyond London and the South East	25	34	10	16	11	4
h)	Our railways are nearly full to bursting now, so we need a new line to connect our major cities together	34	32	8	14	8	4

- Q10. To what extent do you agree or disagree that the UK's current road and rail network is congested and struggling to cope, or do you neither agree nor disagree?

	%
Strongly agree	46
Tend to agree	29
Neither agree nor disagree	14
Tend to disagree	5
Strongly disagree	3
Don't know	3

Q11. Can you please tell me when was the last time you caught a train?

	%
Today	2
Within the last week	20
Within the last month	19
Within the last 2-3 months	14
Within the last 6 months	10
Within the last year	10
Less recently than the last year	23
Never	*
Don't know	1

Q12. Social grade

	%
A	6
B	26
C1	36
C2	13
D	8
E	9
Refused	2

Q1. Gender

	Weighted %	Unweighted %
Male	49	45
Female	51	55

Q2. Age

	Weighted %	Unweighted %
18-24	12	11
25-34	16	15
35-44	15	14
45-54	21	19
55-59	7	8
60-64	7	8
65-69	8	10
70+	14	16

Q3. Working status

	Weighted %	Unweighted %
Working - full-time (30+ hrs)	42	41
Working - part-time (9-29 hrs)	14	15
Unemployed - seeking work	3	3
Unemployed - not seeking work	3	3
Not working	27	28
Other	11	11
Don't know	*	*

Q4. Region

	Weighted %	Unweighted %
East Midlands	7	7
Eastern	10	9
London	13	13
North East	4	4
North West	11	11
Scotland	9	9
South East	14	14
South West	9	9
Wales	5	5
West Midlands	9	9
Yorkshire and Humber	9	9

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