

December 2014

# Consumer survey, Q4 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 4, 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 21<sup>st</sup> November and 5<sup>th</sup> December 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 most of the questions asked, as three previous surveys have been undertaken by Ipsos MORI on behalf of HS2 Ltd. over the course of 2014.

Key findings from the Q4 2014 survey are as follows:

- Seven in ten (70%) say they had heard of High Speed Two or HS2 before the interview; three in ten (30%) had not.
- Of those who report having heard of HS2, a slim majority say they know 'not very much' or 'nothing at all about it'; 52% compared to the 48% 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 (33%) than oppose (19%). A quarter say they either *strongly* support HS2 (15%) or *strongly* oppose it (10%), however, the most common response is 'No views either way', given by 45%.
- A third (33%) think that 'overall, the costs will be greater than the benefits', although over half (53%) are of the view that either the benefits will be greater than the costs (27%) or that they will be about the same (26%).
- While most people think that HS2 will make no difference (either positively or negatively) to them personally or to their local area – 64% 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 74% to 16%) and by a similar margin that it will do so by making it easier to travel between cities (75% to 17%). A majority *disagree* that HS2 is only likely to benefit those in London and the South East (57%).
- The public also agree rather than disagree that the railways are 'nearly full to bursting now', necessitating a new line connecting major cities (67% to 20%). However, more agree than disagree that 'Britain can't afford to spend money on a High Speed Railway line right now' – 50% against 37%.
- Findings of the Q4 survey tend to be slightly more positive towards HS2 than those seen in the previous GB-wide 'mini' survey, conducted in Q2 2014. Over this time period there have been a number of significant changes, including a rise in support for HS2, a fall in opposition, and an increase in the proportion thinking that the benefits of HS2 will outweigh the costs.

## 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 21<sup>st</sup> November and 5<sup>th</sup> December 2014.
- Data are weighted by gender, age, work status and region to reflect the GB 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.

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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	70
No, had not heard of	30
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 who have heard of HS2 (705)

	%
A great deal	3
A fair amount	44
Not very much	48
Nothing at all	4
Don't know	-

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.

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

	%
Strongly support	15
Tend to support	18
No views either way	45
Tend to oppose	9
Strongly oppose	10
Don't know	2

Q7. 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 on HS2 (979)

	%
Definitely decided	59
May change my mind	37
Don't know	5

Q9. 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	33
Overall, the benefits will be greater than the costs	27
The costs and benefits will be about the same	26
Don't know	14

Q10. 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	6	20	64	6	3	1
b) Your local area	6	20	57	9	4	4
c) London	16	53	20	5	1	6
d) The Midlands	20	53	12	5	1	8
e) The North of England	20	48	16	6	2	8
f) The British economy	13	48	20	7	3	9

Q11. 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?

	Strongly agree %	Tend to agree %	Neither agree nor disagree %	Tend to disagree %	Strongly disagree %	Don't know %
a) Britain can't afford to spend money on a High Speed Railway line right now	28	22	9	22	15	4
b) HS2 is only likely to benefit those in London and the South East	14	19	5	33	23	4
c) Building and operating HS2 will directly create jobs and growth across the country	31	43	7	10	6	3
d) HS2 will create jobs and growth by making it easier to travel between our cities	33	41	6	10	7	2
e) Our railways are nearly full to bursting now, so we need a new line to connect our major cities together	36	31	8	12	8	5

Q12. 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	15
Travelled on business	14
Travelled for leisure	43
None of these	49
Don't know	*

Q13. Social grade

	%
A	6
B	22
C1	32
C2	18
D	7
E	9
Refused	6

## Q1. Gender

	Weighted %	Unweighted %
Male	49	47
Female	51	53

## Q2. Age

	Weighted %	Unweighted %
18-24	18	14
25-34	11	10
35-44	12	10
45-54	23	20
55-59	6	10
60-64	7	10
65-69	7	9
70+	15	18
Refused	*	*

## Q3. Working status

	Weighted %	Unweighted %
Working - full-time (30+ hrs)	43	43
Working - part-time (9-29 hrs)	14	15
Unemployed - seeking work	4	3
Unemployed - not seeking work	5	4
Not working	22	23
Other	11	11
Don't know	*	*

## Q. Region

	Weighted %	Unweighted %
East Midlands	7	8
Eastern	9	9
London	13	13
North East	4	5
North West	11	9
Scotland	9	11
South East	14	15
South West	9	10
Wales	5	5
West Midlands	9	8
Yorkshire and Humber	9	8

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