

April 2015

Consumer survey, Q1 2015

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 1, 2015. The survey is part of a programme of consumer and business opinion research, and involved interviews with 2,503 British adults. Fieldwork was undertaken by telephone between 20th February and 9th March 2015.

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 four previous surveys have been undertaken by Ipsos MORI on behalf of HS2 Ltd. over the course of 2014.

Key findings from the Q1 2015 survey are as follows:

- Seven in ten (69%) say they had heard of High Speed Two or HS2 before the interview; three in ten (31%) had not.
- Of those who report having heard of HS2, a majority say they know 'not very much' or 'nothing at all' about it; 56% compared to the 43% 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 (30%) than oppose (21%). A quarter say they either *strongly* support HS2 (13%) or *strongly* oppose it (11%); however, the most common response is 'No views either way', given by 47%.
- Over a third of respondents (37%) think that 'overall, the costs will be greater than the benefits', although over half (51%) are of the view that either the benefits will be greater than the costs (22%) 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 – 66% 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 (62%, 67%, 74% and 69% respectively).
- The public agree rather than disagree that HS2 will directly create jobs and growth across the country (by 73% to 18%) and by the same margin that it will do so by making it easier to travel between cities. A majority *disagree* that HS2 is only likely to benefit those in London and the South East (58%).
- The public also agree rather than disagree that the railways are 'nearly full to bursting now', necessitating a new line connecting major cities (66% to 21%). However, more agree than disagree that 'Britain can't afford to spend money on a High Speed Railway line right now' (49% against 36%) or that 'HS2 will cause too much damage to the countryside' (50% against 32%).
- Findings of the Q1 2015 survey tend to be slightly less positive towards HS2 than those seen in the previous 'mini' survey, conducted in Q4 2014. Since then there has been a fall in the proportion saying they know at least a fair amount about HS2 and an increase in the proportion thinking that the costs will be greater than the benefits (matched by a fall in those thinking the benefits will outweigh the costs).

2 Topline data

- On behalf of HS2 Ltd., Ipsos MORI conducted 2,503 interviews with British adults aged 18+ by telephone.
- Fieldwork took place between 20th February and 9th March 2015.
- 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 (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 CONTROL 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 who have heard of HS2 (1,775)

	%
A great deal	4
A fair amount	40
Not very much	54
Nothing at all	3
Don't know	*
A great deal/fair amount	43
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 who have heard of HS2 (1,775)

	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	38	46	10	2	42	56
b) ...its potential disadvantages	6	36	46	11	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	13
Tend to support	17
No views either way	47
Tend to oppose	10
Strongly oppose	11
Don't know	2
Support	30
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 on HS2 (2,458)

	%
Definitely decided	58
May change my mind	38
Don't know	4

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

Base: All apart from those who have definitely decided they have no views either way on HS2 (1,946)

Positive statements	%
Travel will be faster / easier / better links to / from other areas / easier commute to work	21
Economic benefits / development / businesses will benefit / jobs will be created	14
It's good progress / forward-thinking / it's needed / modernisation / infrastructure is required	8
Improves connection / links / travel between cities / across the country / connects families / friends	13
HS2 will improve efficiency / effectiveness / passenger experience / make commuters lives easier / better	5
Will improve congestion / less cars on the road / car pollution	5
Better for the north-south divide / improved links to the north / south / north will benefit	8
High speed rail links have benefited other countries / need to keep up with other countries	3

Neutral statements	%
I don't travel / use public transport often / won't use HS2 / would rather drive	7
Doesn't affect me / us / the area that I live in / not close by	14
I've never heard about it / don't know much / enough about it / I don't have enough information	13
No strong opinion / no reason / not interested / not thought about it / HS2 has pros and cons	4
Negative statements	%
Costs are / potentially will be too high - for commuters / construction / development / the taxpayer	19
Countryside / rural beauty will be destroyed / negative impact on the environment / wildlife	14
HS2 is not in the entire nation's interest / won't benefit me / my area / no advantage	7
Existing lines / infrastructure / networks should be improved instead / made better use of	8
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	7
It's not needed	5
Other	20
Don't know	2

Q9a. You said that you have no views either way and that you are definitely decided. Why is that?
Base: All who have definitely decided they have no views either way on HS2 (557)

Positive statements	%
It will be good for the economy	2
It will improve capacity on the railways/ help with congestion	1
It will link up different places/ better connectivity	1
It will speed up train times	2
It will be good for Birmingham/ the North of England/ rebalance the economy	1
Improvements to infrastructure are required/ modernisation	1
Neutral statements	%
Irrelevant/ it won't affect me	67
Don't care/ not interested	12
I don't use trains	27
Don't know anything/ enough about it	12
It's got advantages and disadvantages/can see both sides	4
There isn't enough evidence	1
Negative statements	%
Expensive/ poor value for money	4
It would be better to spend the money on something else	1
It won't make enough of a difference	4
It will be bad for the environment/ affect the countryside	2
People's homes will be affected	1
Other	15

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	19	66	5	3	2	24	8
b) Your local area	5	21	57	9	3	6	26	12
c) London	14	52	18	6	1	9	67	7
d) The Midlands	19	55	11	5	1	9	74	6
e) The North of England	17	51	15	6	1	9	69	8
f) REGION (2,202 - excludes London respondents)	11	35	35	10	3	6	46	13
g) The British economy	11	51	17	7	2	12	62	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	37
Overall, the benefits will be greater than the costs	22
The costs and benefits will be about the same	29
Don't know	12

Q11a. You said that you thought that the costs and the benefits of building HS2 will be about the same. If this were the case, do you think HS2 would represent value for money or not?

Base: All who think the costs and benefits of HS2 will be about the same (705)

	%
Would be value for money	60
Would NOT be value for money	22
Don't know	18

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	25	25	11	23	9	7	50	32
b) Britain can't afford to spend money on a High Speed Railway line right now	28	21	8	21	15	6	49	36
c) HS2 is only likely to benefit business travellers	21	25	6	30	16	3	46	46
d) HS2 is only likely to benefit those in London and the South East	15	18	6	35	22	4	33	58
e) Building and operating HS2 will directly create jobs and growth across the country	33	40	6	11	7	2	73	18
f) HS2 will create jobs and growth by making it easier to travel between Britain's cities	34	38	7	11	7	2	73	18
g) Better rail connections brought by HS2 will boost the economy beyond London and the South East	25	40	8	13	9	5	65	22
h) Britain's railways are nearly full to bursting now, so we need a new line to connect its major cities together	35	31	8	13	8	6	66	21

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	10	24	44	10	3	1	8	78	14
b) The new HS2 project will be built and ready within the current timetable	1	4	10	33	28	12	13	15	72
c) The HS2 project will be delivered to the current budget	1	3	9	26	34	18	9	13	78
d) In the future, Britain will look back at the HS2 project and think it was worth it	9	18	31	14	11	5	11	59	30

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	42	40	6	5	5	2	82	10
b) Whether or not I used HS2 wouldn't matter to me, as long as it is a good thing for <i>REGION</i>	35	37	9	9	7	3	72	17

Q15. Which of these would you like to know more about, or would you rather not know any more about any of these?

	%
The line of the HS2 route	44
The benefits of HS2	44
The budget for the HS2 project	41
The timetable for the HS2 project	37
What the political parties think about HS2	25
What the public thinks about HS2	37
What businesses think about HS2	33
None of these	37
Don't know	1

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	7
HS2 Ltd.	16
Local MPs	14
Local media	21
Local councillors	16
Campaign groups	19
Technical experts	53
National media	19
None of these	19

Q17a. Before today, do you recall seeing or hearing anything about HS2 in the past month, or not? This might have been facts, or arguments for or against. It might have been in the media or somewhere else.

	%
Yes – recall seeing information or coverage	25
No – do not recall seeing information or coverage	74
Don't know	1

Q18. Now for some questions about the economy. For each statement, please tell me how 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	73	22	1	2	1	1	95	3
b) <i>REGION</i> needs more jobs and apprenticeships to be created	66	24	2	4	2	2	90	6
c) The British economy needs to be rebalanced so that it is not so dominated by London and the South East	55	27	4	8	3	3	82	11
d) At the moment I don't think anyone has a good plan for growing Britain's economy	28	29	7	21	9	6	57	30

Q19. Now for a statement about infrastructure. By infrastructure I mean things we rely on like road, rail, utilities, housing, broadband and other communications.

Please tell me how much you agree or disagree that 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.

	%
Strongly agree	54
Tend to agree	35
Neither agree nor disagree	3
Tend to disagree	4
Strongly disagree	2
Don't know	2
Agree	89
Disagree	6

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 how 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	4	9	4	33	46	4	13	80
b) <i>REGION's</i> transport network is good enough and does <u>not</u> need new investment	5	11	4	30	46	4	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	17
Travelled for leisure	45
None of these	46
Don't know	1
Travel by train at all in past month	53

Q22. Social grade

	%
A	5
B	21
C1	33
C2	18
D	9
E	7
Refused	7

Q1. Gender

	Weighted %	Unweighted %
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Male	49	45
Female	51	55

Q2. Age

	Weighted %	Unweighted %
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18-24	12	9
25-34	17	13
35-44	14	14
45-54	21	19
55-59	8	11
60-64	8	11
65-69	8	9
70+	12	14
Refused	1	1
18-34	29	22
35-54	35	33
55+	36	45

Q3. Working status

	Weighted %	Unweighted %
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Working - full-time (30+ hrs)	44	44
Working - part-time (9-29 hrs)	14	16
Unemployed - seeking work	3	2
Unemployed - not seeking work	3	2
Not working	22	21
Other	14	14
Don't know	*	*
Working	57	60
Not working	28	26

Region (from sample)

	Weighted %	Unweighted %
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East Midlands	7	7
Eastern	9	9
London	13	12
North East	4	4
North West	11	10
Scotland	9	11
South East	14	16
South West	9	9
Wales	5	5
West Midlands	9	9
Yorkshire and Humber	9	8
'Affected'	50	45
'Non-affected'	50	55

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