

LCCI, HS2 Survey – Q4 2019

Methodology: Savanta ComRes interviewed 508 London business leaders online between 30th October and 26th November 2019. Data were weighted to be representative of all London business leaders by size and broad industry sector. Savanta ComRes is a member of the British Polling Council and abides by its rules. Full tables at www.comresglobal.com

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LCCI - Topical Q4 2019

Q1_SUM. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements? SUMMARY TABLE	1
Base: All respondents	
Q1_1. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements? HS2 costs too much	2
Base: All respondents	
Q1_2. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements? HS2 is necessary	4
Base: All respondents	
Q1_3. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements? HS2 will help to bridge the North/South divide	6
Base: All respondents	
Q1_4. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements? HS2 will boost the UK's economy	8
Base: All respondents	
Q1_5. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements? HS2 will boost London's economy	10
Base: All respondents	
Q1_6. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements? I am not sure of the benefits of HS2	12
Base: All respondents	
Q1_7. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements? HS2 construction has/will cause too much disruption	14
Base: All respondents	

LCCI - Topical Q4 2019

Q1_SUM. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

SUMMARY TABLE

Base: All respondents

	Total	Agree strongly	Tend to agree	Tend to disagree	Disagree strongly	Don't know	NETS		
							Agree	Disagree	Mean
HS2 costs too much	508 100%	222 44%	148 29%	57 11%	19 4%	61 12%	370 73%	76 15%	3.3
HS2 construction has/will cause too much disruption	508 100%	150 29%	176 35%	87 17%	29 6%	66 13%	326 64%	116 23%	3.0
I am not sure of the benefits of HS2	508 100%	127 25%	145 29%	132 26%	45 9%	59 12%	272 54%	177 35%	2.8
HS2 will help to bridge the North/South divide	508 100%	65 13%	169 33%	118 23%	69 14%	87 17%	233 46%	188 37%	2.5
HS2 will boost London's economy	508 100%	67 13%	153 30%	136 27%	53 10%	98 19%	221 43%	189 37%	2.6
HS2 will boost the UK's economy	508 100%	67 13%	147 29%	119 23%	76 15%	99 19%	214 42%	195 38%	2.5
HS2 is necessary	508 100%	65 13%	137 27%	129 25%	104 20%	74 15%	201 40%	232 46%	2.4

LCCI - Topical Q4 2019

Q1_1. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 costs too much

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	222	204	18	2	37	39	42	30	46	12	14	24	198
	44%	44%	37%	13%	49%	40%	61% ehj	45%	39%	43%	39%	40%	44%
Tend to agree (3)	148	135	14	10	18	28	20	22	36	9	7	21	127
	29%	29%	29%	56%	23%	29%	29%	33%	30%	32%	19%	35%	28%
Tend to disagree (2)	57	49	8	1	8	14	3	6	17	3	6	5	52
	11%	11%	17% a	6%	11%	14%	5%	8%	14%	10%	16%	9%	12%
Disagree strongly (1)	19	16	3	1	4	5	*	-	4	2	3	2	17
	4%	3%	7%	7%	6%	5%	*	-	3%	6%	9%	3%	4%
										g	g		
Don't know	61	57	5	3	9	11	4	9	16	3	6	9	53
	12%	12%	10%	18%	12%	12%	6%	14%	14%	9%	17%	14%	12%
NETS													
Net: Agree	370	339	31	12	55	67	62	51	82	21	20	45	325
	73%	74%	66%	69%	72%	69%	89% dehj	78% j	69%	75%	58%	75%	73%
Net: Disagree	76	65	11	2	12	18	3	6	21	5	9	7	69
	15%	14%	24% a	14%	16%	19% f	5%	8%	18%	16%	25% fg	11%	15%
Mean score	3.3	3.3	3.1	2.9	3.3	3.2	3.6	3.4	3.2	3.2	3.1	3.3	3.3
Standard deviation	.85	.83	.96	.78	.92	.90	.60	.67	.86	.92	1.06	.78	.86
Standard error	.04	.05	.07	.23	.12	.08	.10	.09	.10	.13	.17	.11	.04

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

LCCI - Topical Q4 2019

Q1_1. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 costs too much

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 222 44%	108 40%	114 48%	26 39%	182 45%	14 41%	36 38%	186 45%	86 40%	136 47%	67 49%	145 42%	10 43%
Tend to agree	(3) 148 29%	78 29%	70 29%	22 32%	114 28%	12 38%	31 32%	117 28%	57 26%	91 31%	34 25%	106 30%	9 36%
Tend to disagree	(2) 57 11%	37 14%	20 8%	10 14%	44 11%	3 9%	16 17%	41 10%	33 15%	24 8%	10 7%	46 13%	1 5%
Disagree strongly	(1) 19 4%	13 5%	6 3%	1 2%	15 4%	2 7%	6 6%	13 3%	10 4%	9 3%	3 2%	14 4%	2 7%
Don't know	61 12%	33 12%	29 12%	8 12%	51 13%	2 6%	7 8%	54 13%	30 14%	31 11%	23 17%	37 11%	2 8%
NETS													
Net: Agree	370 73%	187 69%	184 77%	48 71%	296 73%	26 78%	67 70%	303 74%	143 66%	228 78%	101 74%	251 72%	19 79%
Net: Disagree	76 15%	50 19%	26 11%	11 16%	60 15%	5 16%	22 23%	54 13%	42 20%	34 12%	13 9%	60 17%	3 13%
Mean score	3.3	3.2	3.4	3.2	3.3	3.2	3.1	3.3	3.2	3.4	3.5	3.2	3.3
Standard deviation	.85	.89	.78	.81	.85	.90	.92	.82	.90	.80	.76	.87	.90
Standard error	.04	.06	.05	.08	.05	.15	.07	.05	.06	.05	.07	.05	.20

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l

LCCI - Topical Q4 2019

Q1_2. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 is necessary

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	65 13%	56 12%	8 18%	5 31%	9 12%	9 9%	2 2%	10 16%	23 20%	1 5%	5 13%	13 21%	52 12%
Tend to agree (3)	137 27%	120 26%	17 35%	2 11%	26 34%	34 35%	16 23%	19 29%	27 22%	9 32%	4 12%	15 25%	122 27%
Tend to disagree (2)	129 25%	121 26%	8 16%	3 17%	26 35%	25 26%	14 20%	18 27%	28 24%	6 21%	9 25%	16 26%	113 25%
Disagree strongly (1)	104 20%	98 21%	6 12%	3 16%	9 12%	19 19%	25 37%	9 13%	22 18%	8 27%	9 25%	9 14%	95 21%
Don't know	74 15%	65 14%	9 19%	4 25%	6 7%	10 11%	12 18%	10 15%	19 16%	4 16%	8 24%	8 13%	66 15%
NETS													
Net: Agree	201 40%	176 38%	25 53%	7 41%	35 46%	43 44%	17 25%	30 45%	50 42%	10 36%	9 25%	28 46%	174 39%
Net: Disagree	232 46%	219 48%	14 28%	6 34%	36 47%	44 45%	39 57%	26 40%	50 42%	14 48%	18 50%	25 41%	208 46%
Mean score	2.4	2.3	2.7	2.7	2.5	2.4	1.9	2.6	2.5	2.2	2.2	2.6	2.3
Standard deviation	1.01	1.00	.98	1.25	.89	.94	.91	.97	1.08	.96	1.10	1.03	1.00
Standard error	.05	.06	.08	.38	.11	.09	.16	.13	.12	.14	.19	.15	.05

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

LCCI - Topical Q4 2019

Q1_2. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 is necessary

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 65	34	30	15	45	5	20	45	30	34	13	50	2
	13%	13%	13%	22%	11%	15%	20%	11%	14%	12%	10%	14%	8%
				d			g						
Tend to agree	(3) 137	71	66	24	105	8	37	100	66	71	39	91	7
	27%	26%	27%	35%	26%	25%	38%	24%	31%	24%	28%	26%	31%
							g						
Tend to disagree	(2) 129	69	60	10	106	13	14	115	44	84	40	80	9
	25%	26%	25%	14%	26%	40%	15%	28%	21%	29%	29%	23%	40%
					c	c	f			h			
Disagree strongly	(1) 104	53	51	13	85	6	16	87	42	61	27	73	4
	20%	20%	21%	18%	21%	17%	17%	21%	20%	21%	20%	21%	17%
Don't know	74	42	32	7	66	1	10	65	32	42	18	55	1
	15%	16%	14%	10%	16%	3%	10%	16%	15%	14%	13%	16%	4%
					e								
NETS													
Net: Agree	201	105	96	39	150	13	56	145	96	105	52	140	9
	40%	39%	40%	57%	37%	40%	59%	35%	45%	36%	38%	40%	39%
				d			g		i				
Net: Disagree	232	122	110	22	191	19	30	202	87	146	67	152	13
	46%	45%	46%	33%	47%	57%	31%	49%	40%	50%	49%	44%	57%
				c	c	c	f		h				
Mean score	2.4	2.4	2.4	2.7	2.3	2.4	2.7	2.3	2.5	2.3	2.3	2.4	2.3
				d			g						
Standard deviation	1.01	1.00	1.01	1.07	.99	.96	1.03	.99	1.02	.99	.95	1.04	.87
Standard error	.05	.07	.07	.11	.06	.16	.08	.06	.07	.07	.08	.06	.20

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l

LCCI - Topical Q4 2019

Q1_3. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 will help to bridge the North/South divide

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%	a	b	*c	d	e	f	g	h	i	j	k	l	
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	65	57	8	1	18	14	2	5	18	3	4	14	51
	13%	12%	17%	8%	23%	15%	2%	8%	15%	10%	11%	22%	11%
					fg	f			f			l	
Tend to agree (3)	169	149	20	6	24	36	15	34	34	10	9	17	152
	33%	32%	42%	37%	32%	37%	22%	51%	28%	34%	27%	28%	34%
			a				dfhj						
Tend to disagree (2)	118	108	11	4	19	25	20	8	25	5	13	15	103
	23%	23%	22%	21%	24%	26%	29%	12%	21%	16%	37%	24%	23%
					g	g	g				gi		
Disagree strongly (1)	69	66	4	3	8	12	17	8	11	6	4	7	63
	14%	14%	8%	16%	10%	13%	25%	12%	9%	21%	11%	11%	14%
		b					h		h				
Don't know	87	82	5	3	7	10	15	10	32	5	5	9	78
	17%	18%	11%	18%	10%	10%	22%	16%	26%	18%	14%	15%	18%
		b					e		de				
NETS													
Net: Agree	233	205	28	8	42	50	17	39	51	13	13	31	203
	46%	45%	59%	45%	55%	52%	25%	59%	43%	44%	38%	50%	45%
			a		f	f		fhj	f	f			
Net: Disagree	188	173	14	6	26	37	37	16	37	11	17	21	166
	37%	38%	30%	38%	35%	38%	53%	25%	31%	38%	48%	35%	37%
							gh				gh		
Mean score	2.5	2.5	2.8	2.4	2.8	2.6	2.0	2.7	2.7	2.4	2.4	2.7	2.5
		a			f	f		f	f		f		
Standard deviation	.94	.95	.87	.94	.97	.93	.86	.85	.94	1.03	.89	1.00	.93
Standard error	.05	.06	.07	.27	.13	.09	.15	.11	.11	.15	.14	.14	.05

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

LCCI - Topical Q4 2019

Q1_3. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 will help to bridge the North/South divide

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 65	28	37	18	43	4	28	36	36	29	23	39	2
	13%	10%	15%	26%	11%	12%	29%	9%	17%	10%	17%	11%	10%
				d			g		i				
Tend to agree	(3) 169	92	76	24	129	15	40	129	71	98	43	113	13
	33%	34%	32%	35%	32%	47%	41%	31%	33%	33%	31%	32%	55%
							g						
Tend to disagree	(2) 118	65	53	8	99	10	13	105	48	70	34	80	4
	23%	24%	22%	12%	24%	31%	13%	26%	22%	24%	25%	23%	17%
					c	c	f						
Disagree strongly	(1) 69	37	32	7	59	3	7	62	29	40	14	54	1
	14%	14%	14%	11%	14%	10%	8%	15%	13%	14%	10%	16%	5%
							f						
Don't know	87	47	40	11	76	*	8	79	31	56	23	61	3
	17%	17%	17%	16%	19%	*	9%	19%	15%	19%	17%	18%	12%
				e	e		f						
NETS													
Net: Agree	233	120	113	42	172	20	68	166	107	126	66	152	16
	46%	45%	47%	62%	42%	59%	70%	40%	50%	43%	48%	44%	66%
				d		d	g						
Net: Disagree	188	102	85	16	158	14	20	167	77	110	47	135	5
	37%	38%	36%	23%	39%	41%	21%	41%	36%	38%	35%	39%	22%
					c	c	f						
Mean score	2.5	2.5	2.6	2.9	2.5	2.6	3.0	2.4	2.6	2.5	2.7	2.5	2.8
				d			g						
Standard deviation	.94	.92	.97	.98	.93	.83	.90	.92	.97	.92	.94	.95	.72
Standard error	.05	.06	.07	.10	.05	.13	.07	.06	.07	.06	.08	.06	.16

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l

LCCI - Topical Q4 2019

Q1_4. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 will boost the UK's economy

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	67	59	8	3	18	10	1	9	20	2	5	17	50
	13%	13%	17%	17%	23% efi	10%	1%	13%f	17%f	7%	14%f	28%l	11%
Tend to agree (3)	147	129	18	11	19	33	10	22	33	10	9	17	130
	29%	28%	37% a	66%	25%	34% f	14%	33% f	28%	34% f	25%	28%	29%
Tend to disagree (2)	119	112	8	-	24	22	17	18	23	8	8	12	107
	23%	24% b	16%	-	31%	22%	25%	27%	19%	28%	23%	20%	24%
Disagree strongly (1)	76	69	7	-	6	17	26	7	11	3	6	4	72
	15%	15%	15%	-	8%	17%	38% deghij	10%	9%	12%	16%	7%	16%
Don't know	99	92	7	3	9	15	15	11	33	5	7	11	88
	19%	20%	14%	18%	12%	16%	22%	17%	28% de	19%	21%	17%	20%
NETS													
Net: Agree	214	188	26	14	37	43	10	30	53	12	14	34	180
	42%	41%	54% a	82%	49% f	45% f	15%	46% f	44% f	41% f	40% f	56% l	40%
Net: Disagree	195	180	15	-	30	39	44	25	33	11	14	16	179
	38%	39%	32%	-	39%	40%	63% deghij	37%	28%	40%	39%	27%	40%
Mean score	2.5	2.5	2.7	3.2	2.7 f	2.4 f	1.7	2.6 f	2.7 f	2.5 f	2.5 f	2.9 l	2.4
Standard deviation	.98	.97	1.00	.42	.96	.96	.81	.91	.96	.86	1.03	.96	.96
Standard error	.05	.06	.08	.12	.13	.09	.14	.12	.12	.12	.17	.14	.05

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

LCCI - Topical Q4 2019

Q1_4. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 will boost the UK's economy

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	67 13%	27 10%	39 17%	18 27%	45 11%	4 11%	27 28%	40 10%	37 17%	30 10%	22 16%	43 12%	2 8%
Tend to agree (3)	147 29%	79 29%	67 28%	25 36%	114 28%	8 24%	34 35%	113 27%	65 30%	82 28%	37 27%	103 30%	6 27%
Tend to disagree (2)	119 23%	65 24%	55 23%	7 10%	97 24%	15 44%	9 9%	110 27%	36 17%	83 29%	34 25%	74 21%	11 46%
Disagree strongly (1)	76 15%	43 16%	33 14%	11 16%	61 15%	4 13%	20 20%	56 14%	36 17%	40 14%	16 12%	55 16%	5 20%
Don't know	99 19%	55 20%	44 19%	7 10%	89 22%	2 7%	7 7%	92 22%	41 19%	58 20%	26 19%	73 21%	- -
NETS													
Net: Agree	214 42%	107 40%	107 45%	43 63%	159 39%	12 35%	61 63%	153 37%	102 47%	112 38%	59 44%	146 42%	8 34%
Net: Disagree	195 38%	108 40%	88 37%	18 26%	158 39%	19 58%	29 30%	167 40%	72 34%	123 42%	51 37%	129 37%	16 66%
Mean score	2.5	2.4	2.6	2.8 de	2.5	2.4	2.8 g	2.4	2.6	2.4	2.6	2.5	2.2
Standard deviation	.98	.95	1.00	1.06	.96	.88	1.11	.92	1.04	.92	.98	.98	.87
Standard error	.05	.07	.07	.11	.06	.15	.09	.06	.07	.06	.08	.06	.19

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l

LCCI - Topical Q4 2019

Q1_5. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 will boost London's economy

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	67	59	9	1	18	13	2	9	16	2	5	12	55
	13%	13%	18%	8%	24%	14%	2%	13%	14%	8%	15%	20%	12%
					fi	f							
Tend to agree (3)	153	133	20	7	23	32	11	27	35	9	9	20	133
	30%	29%	42%	41%	30%	33%	16%	41%	30%	32%	25%	33%	30%
			a			f		f					
Tend to disagree (2)	136	128	8	6	18	22	26	14	33	8	10	17	119
	27%	28%	16%	34%	23%	23%	38%	22%	27%	28%	27%	28%	27%
		b											
Disagree strongly (1)	53	50	3	-	8	13	14	4	4	4	6	2	51
	10%	11%	6%	-	10%	13%	20%	7%	3%	14%	16%	3%	11%
					h	h	gh		h	h	h		
Don't know	98	90	8	3	9	17	16	12	31	5	6	9	90
	19%	20%	18%	18%	12%	17%	23%	18%	26%	18%	17%	15%	20%
								d					
NETS													
Net: Agree	221	192	29	8	41	46	13	36	52	12	14	33	188
	43%	42%	60%	49%	54%	47%	19%	54%	43%	41%	40%	54%	42%
			a		f	f		f	f	f	f		
Net: Disagree	189	178	11	6	25	35	40	19	37	12	15	19	170
	37%	39%	22%	34%	33%	36%	58%	29%	31%	42%	44%	32%	38%
		b					degh						
Mean score	2.6	2.5	2.9	2.7	2.8	2.6	2.0	2.7	2.7	2.4	2.5	2.8	2.5
		a			f	f		f	f	f		l	
Standard deviation	.91	.92	.84	.66	.98	.95	.78	.83	.82	.90	1.01	.84	.92
Standard error	.04	.06	.07	.19	.13	.09	.14	.12	.10	.13	.16	.12	.05

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

LCCI - Topical Q4 2019

Q1_5. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 will boost London's economy

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	67 13%	33 12%	35 15%	19 29% d	42 10%	5 16%	27 28% g	40 10%	38 18% i	29 10%	25 18%	43 12%	- -
Tend to agree (3)	153 30%	82 31%	71 30%	23 34%	121 30%	9 28%	37 38% g	117 28%	70 32%	84 29%	38 28%	107 31%	9 38%
Tend to disagree (2)	136 27%	75 28%	61 26%	13 19%	114 28%	10 30%	16 17%	120 29% f	47 22%	89 30% h	43 31%	83 24%	10 43%
Disagree strongly (1)	53 10%	22 8%	30 13%	4 6%	44 11%	5 15%	6 6%	47 11%	25 11%	28 10%	10 7%	40 12%	3 11%
Don't know	98 19%	57 21%	42 18%	9 13%	86 21% c	4 11%	10 10%	89 22% f	36 17%	63 21%	21 15%	76 22%	2 8%
NETS													
Net: Agree	221 43%	115 43%	106 44%	43 63% de	163 40%	15 44%	64 66% g	157 38%	108 50% i	113 39%	62 46%	149 43%	9 38%
Net: Disagree	189 37%	97 36%	91 38%	17 25%	157 39% c	15 45% c	23 23%	166 40% f	72 33%	117 40%	53 39%	123 35%	13 54%
Mean score	2.6	2.6	2.6	3.0 de	2.5	2.5	3.0 g	2.5	2.7 i	2.5	2.7	2.6	2.3
Standard deviation	.91	.87	.96	.91	.89	.99	.90	.89	.96	.87	.91	.93	.68
Standard error	.04	.06	.07	.09	.05	.17	.07	.05	.07	.06	.08	.06	.15

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l

LCCI - Topical Q4 2019

Q1_6. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

I am not sure of the benefits of HS2

Base: All respondents

	Total	BUSINESS SIZE		INDUSTRY								MANUFACTURING/SERVICES	
		0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
		a	b	*c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	127	117	10	2	12	26	36	14	21	7	9	10	117
	25%	25%	21%	13%	16%	26%	53%	21%	18%	24%	25%	17%	26%
							deg hij						
Tend to agree (3)	145	131	14	9	23	30	7	20	39	7	9	19	126
	29%	29%	30%	55%	31%	31%	10%	31%	33%	25%	27%	31%	28%
					f	f		f	f		f		
Tend to disagree (2)	132	120	12	*	25	22	12	21	33	10	9	14	117
	26%	26%	24%	2%	33%	22%	17%	31%	27%	35%	26%	24%	26%
Disagree strongly (1)	45	42	4	*	11	8	6	3	12	2	3	7	38
	9%	9%	8%	*	15%	9%	9%	4%	10%	5%	9%	12%	9%
					g								
Don't know	59	51	8	5	5	11	8	8	14	3	4	10	49
	12%	11%	17%	30%	6%	11%	12%	13%	12%	10%	12%	16%	11%
NETS													
Net: Agree	272	248	24	11	35	56	43	34	60	14	18	29	243
	54%	54%	51%	67%	46%	58%	62%	52%	51%	49%	52%	48%	54%
Net: Disagree	177	162	15	*	36	30	18	24	45	12	12	22	155
	35%	35%	32%	2%	47%	31%	26%	36%	37%	41%	35%	36%	35%
					ef								
Mean score	2.8	2.8	2.8	3.1	2.5	2.8	3.2	2.8	2.7	2.8	2.8	2.6	2.8
						d	dghi						
Standard deviation	.97	.97	.95	.48	.95	.97	1.08	.87	.93	.94	.99	.97	.97
Standard error	.05	.06	.07	.15	.12	.09	.18	.12	.10	.13	.16	.14	.05

Columns Tested: a, b - c, d, e, f, g, h, i, j - k, l

LCCI - Topical Q4 2019

Q1_6. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

I am not sure of the benefits of HS2

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	127 25%	58 21%	69 29%	21 32%	96 24%	9 28%	22 23%	104 25%	43 20%	84 29% h	33 24%	85 24%	9 39%
Tend to agree (3)	145 29%	75 28%	71 30%	20 29%	115 28%	10 31%	25 26%	121 29%	62 29%	84 29%	47 34%	92 26%	7 30%
Tend to disagree (2)	132 26%	71 26%	61 26%	13 19%	108 27%	11 32%	27 28%	105 25%	62 29%	70 24%	26 19%	100 29% j	5 22%
Disagree strongly (1)	45 9%	28 10%	18 7%	3 5%	39 10%	3 9%	14 14% g	31 8%	23 11%	22 7%	13 10%	31 9%	1 5%
Don't know	59 12%	38 14% b	20 9%	11 16% e	48 12% e	- -	8 9%	50 12%	26 12%	33 11%	18 13%	40 12%	1 4%
NETS													
Net: Agree	272 54%	133 49%	140 59% a	42 61%	211 52%	20 59%	47 49%	225 55%	105 49%	167 57%	80 58%	176 51%	16 69%
Net: Disagree	177 35%	98 37%	79 33%	16 23%	147 36% c	14 41% c	41 42% g	136 33%	85 39%	92 31%	39 29%	132 38% j	6 27%
Mean score	2.8	2.7	2.9	3.0 d	2.7	2.8	2.6	2.8 f	2.7	2.9 h	2.8	2.7	3.1
Standard deviation	.97	.98	.95	.91	.97	.97	1.04	.95	.96	.96	.96	.97	.93
Standard error	.05	.07	.06	.09	.05	.15	.08	.06	.06	.06	.08	.06	.21

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l

LCCI - Topical Q4 2019

Q1_7. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 construction has/will cause too much disruption

Base: All respondents

	BUSINESS SIZE			INDUSTRY								MANUFACTURING/SERVICES	
	Total	0-9	10+	Agriculture, forestry & fishing / production	Construction / property	Motor trades / wholesale / retail / transport & storage / accommodation & food services	Information & communication	Finance & insurance / business administration and support	Professional, scientific & technical	Public administration and defence / education / health	Arts, entertainment, recreation and other services	Manufacturing	Services
	a	b	*c	d	e	f	g	h	i	j	k	l	
Significance Level: 95%													
Unweighted Total	508	326	182	13	65	130	40	65	90	57	48	55	453
Weighted Total	508	460	48	17	76	97	69	66	119	29	35	61	447
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly (4)	150	135	15	5	12	29	32	16	39	9	7	8	142
	29%	29%	31%	30%	16%	30%	46%	24%	33%	33%	21%	14%	32%
					d	d	dgj	d	d	d			k
Tend to agree (3)	176	159	17	3	39	34	21	28	31	8	12	24	152
	35%	35%	36%	19%	51%	35%	31%	42%	26%	28%	34%	40%	34%
					efhi			h					
Tend to disagree (2)	87	79	8	5	14	14	6	11	25	5	6	14	73
	17%	17%	16%	27%	18%	14%	9%	17%	21%	19%	18%	22%	16%
Disagree strongly (1)	29	26	3	1	5	6	*	3	8	2	3	6	23
	6%	6%	6%	6%	7%	6%	*	5%	7%	8%	9%	10%	5%
Don't know	66	61	5	3	6	14	10	8	16	3	7	9	58
	13%	13%	11%	18%	7%	14%	14%	12%	14%	12%	19%	14%	13%
NETS													
Net: Agree	326	294	32	8	51	63	53	43	70	17	19	32	293
	64%	64%	67%	49%	67%	65%	77%	66%	59%	61%	55%	53%	66%
							hj						
Net: Disagree	116	105	11	6	19	20	6	15	33	8	9	20	96
	23%	23%	22%	33%	25%	21%	9%	22%	27%	27%	27%	32%	21%
					f				f	f	f		
Mean score	3.0	3.0	3.0	2.9	2.8	3.0	3.4	3.0	3.0	3.0	2.8	2.7	3.1
							deg hij						k
Standard deviation	.89	.89	.91	1.02	.80	.91	.69	.84	.97	1.00	.95	.89	.89
Standard error	.04	.05	.07	.30	.10	.08	.11	.11	.11	.14	.15	.13	.04

Columns Tested: a,b - c,d,e,f,g,h,i,j - k,l

LCCI - Topical Q4 2019

Q1_7. HS2 is a proposed rail route linking London and Manchester via Birmingham. To what extent do you agree or disagree with each of the following statements?

HS2 construction has/will cause too much disruption

Base: All respondents

	Total	LOCATION		EXPECTED CHANGES IN WORKFORCE SIZE			PAST RECRUITMENT		CAPACITY		EXPECTED PRICES		
		Inner London	Outer London	Increase	Stay the same	Fall	Tried to recruit	Did not try to recruit	Full capacity	Below capacity	Rise	Stay the same	Fall
		a	b	c	d	e	f	g	h	i	j	k	l
Significance Level: 95%													
Unweighted Total	508	254	254	106	362	40	177	331	248	260	154	332	22
Weighted Total	508	269	239	68	407	33	96	412	215	293	136	348	24
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Agree strongly	(4) 150	74	76	25	116	9	31	119	62	88	47	99	4
	29%	27%	32%	36%	29%	27%	32%	29%	29%	30%	35%	28%	16%
Tend to agree	(3) 176	100	76	21	140	15	29	147	65	111	40	118	18
	35%	37%	32%	31%	34%	46%	30%	36%	30%	38%	30%	34%	75%
Tend to disagree	(2) 87	48	39	14	68	5	23	64	43	44	21	65	1
	17%	18%	16%	20%	17%	15%	24%	16%	20%	15%	15%	19%	4%
Disagree strongly	(1) 29	14	15	2	24	3	7	22	15	14	8	21	1
	6%	5%	6%	3%	6%	9%	8%	5%	7%	5%	6%	6%	5%
Don't know	66	33	33	6	59	1	7	60	31	35	20	46	-
	13%	12%	14%	9%	15%	3%	7%	14%	14%	12%	15%	13%	-
					e			f					
NETS													
Net: Agree	326	174	152	46	256	24	59	267	127	199	88	216	22
	64%	65%	64%	68%	63%	73%	62%	65%	59%	68%	65%	62%	91%
										h			
Net: Disagree	116	62	54	16	92	8	30	86	58	58	28	85	2
	23%	23%	22%	23%	23%	24%	31%	21%	27%	20%	21%	25%	9%
							g						
Mean score	3.0	3.0	3.0	3.1	3.0	2.9	2.9	3.0	2.9	3.1	3.1	3.0	3.0
Standard deviation	.89	.87	.92	.87	.90	.91	.96	.88	.95	.85	.92	.90	.63
Standard error	.04	.06	.06	.09	.05	.15	.07	.05	.06	.06	.08	.05	.13

Columns Tested: a,b - c,d,e - f,g - h,i - j,k,l