

Populus research report

Department for Transport
High Speed 2: Line of Route & General Public Survey
March 2013



Methodology

Line of route poll

Populus conducted 2,001 telephone interviews between the 7th and 11th March 2013 with residents along the proposed line of route for High Speed 2 (Phases 1 & 2). Respondents were drawn from a random sample of residents living within 10 miles of the proposed route from London to Birmingham, extending to Manchester and Leeds.

The line of route was divided into seven geographic blocs:

- 4 destination cities: London, Birmingham, Leeds, Manchester
- 3 areas between destination cities: London – Birmingham; Birmingham – Leeds; Birmingham – Manchester.

The number of interviews conducted in each geographic bloc reflected the balance of population living along the line of route.

The sample has been weighted to be demographically representative of the line of route population.

General public poll

Populus interviewed 2,058 members of the general public online between 6th and 8th March 2013. Results have been weighted to be representative of the British adult population.

Tracking changes in opinion over time

In the first wave of this research, conducted between the 11th and 20th January 2013, 2,000 line of route residents and 2,013 members of the general public were interviewed by telephone and online respectively. The positive and negative numbers listed (in green and red respectively) immediately beneath the data throughout this report represent the change in opinion since this first wave of research in January. In cases where these figures are not listed, the question is new to our study this March.

Segmentation

As part of the original study in January, Populus conducted a segmentation analysis on the results to the line of route poll with the aim of identifying groups of residents who shared similar attitudes.

The analysis identified the strongest correlations between residents' answers to different questions and created attitudinal segments based on these. The segments identified in this study are based on respondents' answers to five questions:

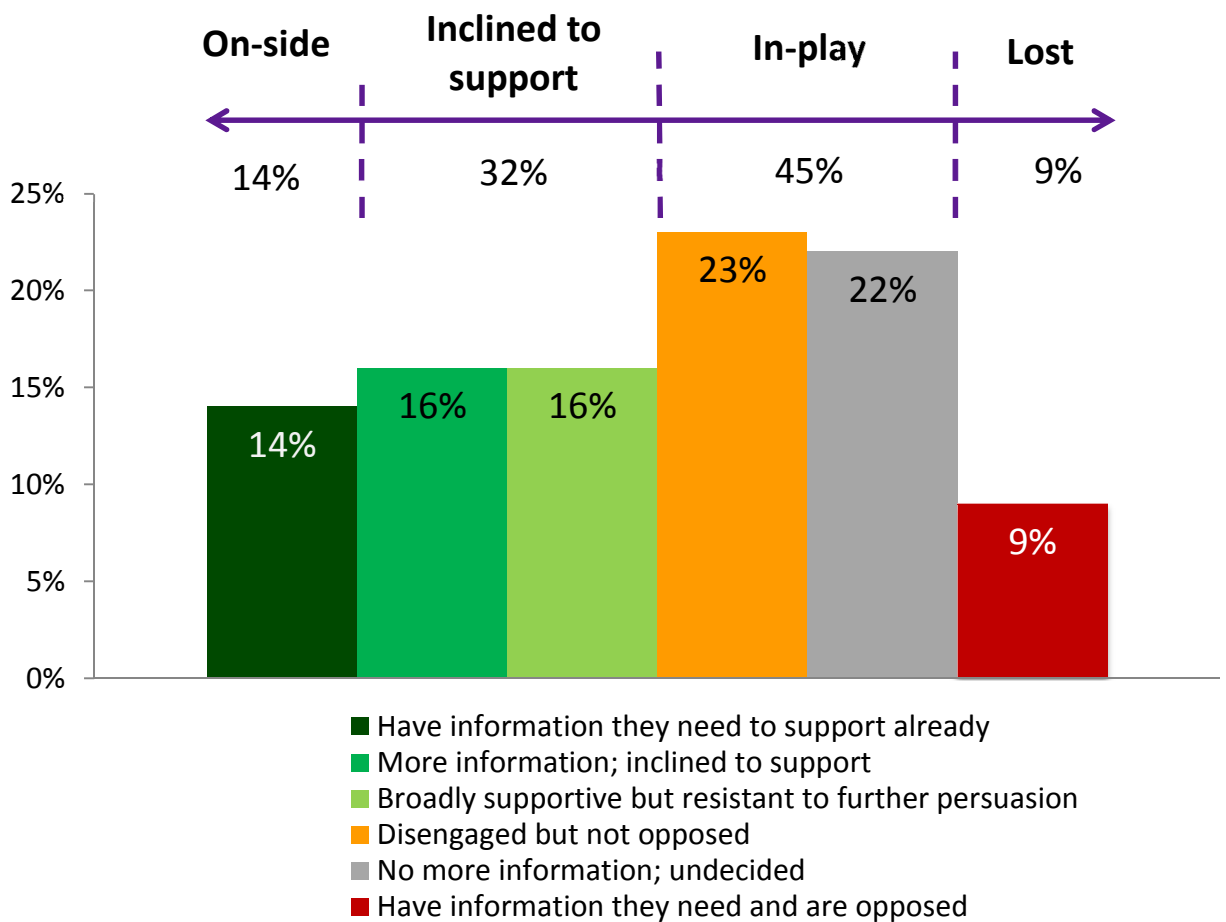
- Q1: awareness of HS2
- Q2: level of information they have and want to receive about HS2
- Q4: support for / opposition to HS2
- Q5: perceived benefits of HS2
- Q6: agreement with a mix of positive and negative statements about HS2



The two main predictors of which segment someone fell into were their level of support for HS2 (Q4) and the amount of information they wanted to receive about it (Q2).

The six segments identified by the analysis are below, along with the shortened description that is used in the tables.

Full description	Shortened description
Have information they need to support already	Support already
More information; inclined to support	Inclined to support
Broadly supportive but resistant to further persuasion	Broadly supportive
Disengaged but not opposed	Disengaged
No more information; undecided	Undecided
Have information they need and are opposed	Opposed



Base: Line of route (2,001), broken down into: Support already (277), Inclined to support (329), Broadly supportive (316), Disengaged (458), Undecided (439) & Opposed (181).



Awareness of HS2

- Awareness of HS2 – and Phase 2 in particular – has increased significantly since January. Almost two-thirds (64%) of residents along the line of route are now aware of both phases (an increase of 17%) and awareness of both phases among the general public has increased by 24% to 62%.
- Residents who live in locations along the line of route that would be affected by Phase 2 have seen a particularly big jump in their awareness of the project. In Leeds, awareness has jumped 29% to 83%.
- Whilst Phase 2 residents have become more aware of both phases of the project, residents in London, Birmingham and the London-Birmingham geographical bloc are no more aware of Phase 1 than they were in January.
- Levels of awareness among the general public are strongly influenced by the region they live in. 79% of people living in the West Midlands are aware of both phases, compared to only 66% in Wales and Scotland.

Level of information about HS2

- As well as being more aware of HS2, both line of route residents and the general public also feel more informed about both phases. The number of people who say they have no information about phase 1 has fallen to 49% among line of route residents (a drop of 7%) and to 47% among the general public (down from 62% in January). Similarly, the number of people who have no information about Phase 2 has fallen to 54% among line of route residents (down 12%) and to 51% among the general public (down from 72%).
- The biggest increase in knowledge of HS2 has been among people living in areas affected by Phase 2 – the number of residents in Leeds who say they have no information has dropped by 21%. These Phase 2 areas are also more likely to want to receive more information regarding the extension of HS2 to Leeds and Manchester. 30% of residents in Manchester would like to receive more information, as do 29% of residents in Leeds feel the same way. Only one third of Leeds residents say they have no information and do not want to receive any (34%), a fall of 19% since January.
- Though there are now more people along the line of route and among the general public who say they want to receive more information about HS2, there has also been an increase in the number of people saying they have all the information they want. Essentially, many of those who have recently been made aware of High Speed 2 do not want to receive any more information about it, large because they are unaffected by it.



- Those living on the line of route are 10% more likely to have received all the information they want about High Speed 2 than the general public (34% against 24% for Phase 1 and 31% against 21% for Phase 2). However, members of the general public are more likely to have received information on HS2 than they were in January of this year. Female members of the general public are considerably less engaged with HS2 than men are: 40% of women say that they have no information but do not want to receive any, compared with 28% of men.

Recollection of media coverage

- Members of the general public are marginally more likely to recall having seen some information or coverage about High Speed 2 and to have paid some attention to it over the past month than residents along the line of route (47% against 44% of line of route residents).
- The vast majority of line of route residents who have seen some HS2 information or coverage in the past month recall it being about the speed of the trains and their reduced journey times (87%), HS2's impact on the countryside (85%), HS2 serving to connect up London, the Midlands and the North (82%) and opposition among local residents or campaigns against the project (81%). Three-quarters recall information on the economic and employment benefits (75%) and on the costs involved and the project time-frame (74%).

Opinion of HS2

- Just under half of those living along the High Speed 2 line of route (45%) are in favour of HS2, a small drop since January 2013 of 3%. However, those who commute by train are far more positive about HS2: two-thirds (66%) are in favour, 10% more than in January.
- Residents in areas affected by Phase 2 feel much less favourable towards HS2 than they did in January, whilst residents in areas affected by Phase 1 are more in favour than they were in January of this year. The most significant decreases in favourability can be seen in the Leeds and Birmingham-Manchester geographic blocs (11% and 16% decreases respectively). Favourability has increased, however, in London (up 5%) and the London-Birmingham bloc (3%).
- Two-fifths (41%) of the general public are in favour of HS2, a decrease of 7% since January. Again, those who commute by train feel more positive: half (50%) of this group are in favour. Men are also more likely to be in favour of HS2 than women (47% against 35%).



Perceived benefits and costs

- One third of line of route residents (33%) believe that HS2 will impact positively on them personally, rising to 47% of those who commute by train, and two-fifths (40%) believe that the project will impact positively on their local area. These are the only two areas in which more residents believe HS2 will have a positive impact than in January.
- Three-in-five line of route residents (61%) believe that HS2 will have a positive impact on the British economy, representing a 3% decrease since January 2013. However, over three-quarters (77%) of line of route residents who commute by train believe that HS2 will impact positively on the economy, representing an increase of 7% since January.
- Line of route residents and members of the general public are most convinced of HS2's positive impact on different regions of the country. Seven in ten believe that the Midlands will see a positive impact at the hands of HS2 (71% line of route and general public each) and approximately two-thirds see the North and London being impacted on positively (69% and 68% line of route respectively, 66% and 63% general public respectively).
- Both residents along the line of route and the general public believe that HS2 will create jobs and growth directly through its construction and operation (85% of line of route residents and 73% of the public). 68% of line of route residents and 52% of the general public also believe that HS2 will contribute to economic growth indirectly.
- 65% of line of route residents agree that HS2 will help boost the economy outside of London, with 53% of the general public agreeing this will be the case. Three in ten line of route respondents and members of the general public (29% each) believe that London is the only part of Britain that will truly benefit from the introduction of the High Speed Railway.
- Though three-quarters (77%) of line of route residents think that large-scale British infrastructure projects always take longer than planned and cost more than originally budgeted, 73% agree that the government should spend money on national infrastructure, even in times of economic difficulty, in order to plan for the future. Less than half (48%) of line of route residents believe that Britain cannot afford to invest in a High Speed Railway line at the moment.
- To many, a new railway line seems necessary: over half of the general public (55%) agree that our railways are now overcrowded to the point that a new line should be built, rising to 65% of residents on the line of route and three-quarters of residents on the line of route who take the train to work (74%).



Respondent Profiles

Location on the Route

London	31%
Birmingham	8%
Manchester	9%
Leeds	8%
London - Birmingham	13%
Birmingham - Manchester	15%
Birmingham - Leeds	17%

Primary Mode of Travel to Work

	Line of Route Residents (Base: 2001)	General Public (Base: 2058)
Car	54%	60%
Walk	11%	13%
Bus	10%	12%
Train	10%	5%
Cycle	3%	4%
Underground	6%	3%
Motorbike	1%	<1%
Tram	<1%	<1%
Other	5%	2%

Age

	Line of Route Residents	General Public
18 - 24	13%	12%
25 - 34	20%	16%
35 - 44	19%	19%
45 - 54	16%	17%
55 - 64	15%	15%
65+	18%	21%

Social Grade

	Line of Route Residents	General Public
AB	25%	27%
C1	26%	29%
C2	19%	21%
DE	21%	23%



Summary tables

Awareness

Q.1. Which, if any, of the following proposed infrastructure projects are you aware of? [All respondents]

	Line of Route Total	Location on Route						
		London	B'ham	Man-chester	Leeds	London-B'ham	B'ham-Manchr	B'ham-Leeds
Building a High Speed Railway line linking London and Birmingham	73%	66%	84%	63%	77%	83%	76%	74%
	+5%	+3%	-3%	+13%	+17%	-2%	+6%	+11%
Building a High Speed Railway line linking London and Birmingham, extending to Leeds and Manchester	64%	48%	63%	71%	83%	73%	70%	69%
	+17%	+11%	+2%	+19%	+29%	+24%	+20%	+21%
Unaware of either	20%	30%	13%	23%	12%	11%	14%	17%
	-8%	-3%	+3%	-15%	-23%	-3%	-10%	-16%

	Segment					
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed
Building a High Speed Railway line linking London and Birmingham	85%	75%	90%	47%	72%	90%
	+5%	+8%	-6%	+4%	+7%	-2%
Building a High Speed Railway line linking London and Birmingham, extending to Leeds and Manchester	73%	65%	80%	40%	61%	89%
	+10%	+13%	+7%	+15%	+21%	+23%
Unaware of either	7%	18%	3%	44%	21%	4%
	-8%	-8%	+2%	-7%	-11%	-3%



	General Public			
	Total	Male	Female	Take the Train to Work
Building a High Speed Railway line linking London and Birmingham	58%	64%	52%	63%
	+8%	+4%	+11%	+3%
Building a High Speed Railway line linking London and Birmingham, extending to Leeds and Manchester	62%	71%	54%	67%
	+24%	+21%	+28%	+9%
Unaware of either	21%	15%	27%	16%
	-15%	-9%	-20%	-11%

Awareness has almost universally improved since January 2013; most notably in locations along the line of route that are affected by Phase 2. In particular, 35% of residents in Leeds were unaware of either Phase of HS2 in January, whereas now only 12% are unaware of either project. Awareness of Phase 2 in particular has risen since January of this year, amongst both line of route residents and members of the general public. Awareness of Phase 2 has increased by a quarter (24%) amongst the general public and by 17% on average along the line of route. The proportion of Leeds residents who are aware of Phase 2 has risen by 29% since January.

Whilst Phase 2 residents have become more aware of Phase 2 in the last few months, residents in London, Birmingham and the London-Birmingham geographical bloc are no more aware of Phase 1 than they were in January.

Much like in January, those living on the High Speed 2 line of route are more aware of both phases of the project than members of the general public. Three-quarters of line of route residents (73%) are aware of Phase 1, rising to 84% of those living in Birmingham city and 83% of those living in the London-Birmingham geographic bloc, and nearly two-thirds (64%) of line of route residents are aware of Phase 2, rising to 83% of Leeds residents.

Having said this, awareness amongst members of the general public has improved significantly since January 2013. Just one fifth (21%) of the general public are now unaware of either Phase 1 or 2 of the project, compared with over one third (36%) of the public in January. Levels of awareness are largely dependent on region: those living in Yorkshire and the West Midlands are the most aware of HS2 (only 12% and 11% unaware of either project respectively) and those living in Scotland and Wales are the least aware (35% and 31% unaware of either respectively).

Those who commute by train are marginally more likely to be aware of both projects. Men are also more aware than women: more than a quarter of female members of the general public are unaware of either project (27%), whilst this applies to only 15% of men.



With regard to segments, we have seen the most change in awareness of HS2 since January amongst those who are ‘in play’, and with regard to Phase 2 of the project. 15% more of those who are *disengaged but not opposed* and 21% more of those who *want no more information but are undecided* are now aware of Phase 2. However, almost one quarter (23%) of those who *have the information they need and are opposed* are also newly aware of Phase 2.

Q.2.a) And how well informed do you feel about the following projects: Building a High Speed Railway line linking London and Birmingham? [All respondents]

	Line of Route Total	Location on Route						
		London	B'ham	Manchester	Leeds	London-B'ham	B'ham – M'chester	B'ham-Leeds
I have all the information I want	34%	33%	46%	26%	27%	40%	30%	35%
	+3%	+6%	+3%	+5%	+2%	-4%	+2%	+4%
I have some information but would like to know more	16%	18%	15%	14%	17%	14%	18%	16%
	+3%	+3%	0%	+8%	+7%	-4%	+4%	+6%
I have no information but would like to receive some	8%	11%	6%	12%	10%	6%	5%	7%
	0%	+1%	-1%	0%	+3%	-2%	-3%	+1%
I have no information and don't want to receive any	41%	38%	32%	47%	46%	40%	47%	42%
	-7%	-10%	-3%	-13%	-12%	+10%	-3%	-12%



	Segment					
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed
I have all the information I want	55%	0%	100%	0%	24%	58%
	+4%	0%	+3%	-2%	+3%	+2%
I have some information but would like to know more	21%	63%	0%	2%	8%	9%
	+3%	+14%	-1%	0%	-2%	-9%
I have no information but would like to receive some	2%	36%	0%	2%	7%	4%
	-4%	-11%	0%	-1%	+3%	+1%
I have no information and don't want to receive any	22%	4%	0%	96%	62%	29%
	-3%	0%	-2%	+2%	-3%	+6%

	General Public			
	Total	Male	Female	Take the Train to Work
I have all the information I want	24%	26%	22%	27%
	+10%	+7%	+12%	+12%
I have some information but would like to know more	29%	33%	25%	49%
	+6%	+4%	+8%	+6%
I have no information but would like to receive some	13%	13%	13%	7%
	-6%	-5%	-8%	-9%
I have no information and don't want to receive any	34%	28%	40%	16%
	-9%	-5%	-13%	-11%



Q.2.b) And how well informed do you feel about the following projects: Building a High Speed Railway line linking London and Birmingham, extending to Leeds and Manchester? [All respondents]

	Line of Route Total	Location on Route						
		London	B'ham	Man-chester	Leeds	London-B'ham	B'ham – M'chester	B'ham - Leeds
I have all the information I want	31%	28%	41%	27%	37%	36%	25%	34%
	+8%	+9%	+6%	+7%	+14%	+7%	+4%	+10%
I have some information but would like to know more	15%	14%	11%	15%	17%	15%	18%	18%
	+5%	+3%	-1%	+7%	+7%	+4%	+7%	+9%
I have no information but would like to receive some	10%	13%	4%	15%	12%	7%	9%	6%
	-2%	-1%	-4%	-4%	-2%	0%	-4%	-4%
I have no information and don't want to receive any	44%	46%	44%	42%	34%	42%	48%	42%
	-10%	-10%	-1%	-10%	-19%	-11%	-7%	-15%

	Segment					
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed
I have all the information I want	54%	0%	83%	1%	23%	58%
	+14%	0%	+4%	0%	+10%	+18%
I have some information but would like to know more	17%	57%	4%	<1%	8%	14%
	+1%	+19%	+1%	0%	+2%	0%
I have no information but would like to receive some	4%	43%	1%	2%	5%	4%
	-8%	-18%	-3%	0%	-2%	-3%
I have no information and don't want to receive any	25%	0%	12%	97%	64%	24%
	-6%	-1%	-2%	+1%	-10%	-15%



	General Public			
	Total	Male	Female	Take the Train to Work
I have all the information I want	21%	23%	20%	21%
	+11%	+9%	+13%	+12%
I have some information but would like to know more	28%	32%	24%	46%
	+10%	+8%	+13%	+9%
I have no information but would like to receive some	17%	17%	17%	13%
	-11%	-10%	-12%	-13%
I have no information and don't want to receive any	34%	28%	39%	20%
	-10%	-7%	-14%	-9%

Line of route residents feel more informed on both Phases of HS2 than they did in January – higher proportions have received some information on HS2 projects than in January – but especially with regard to Phase 2. This is reflected in the fact that line of route residents are only 3% more likely than they were in January to say that they now have all the information they want regarding Phase 1 of HS2; whilst they are 8% more likely to say this about information regarding Phase 2 than they were in January.

Phase 2 residents are better informed and more engaged than they were in January with regard to both Phases of the project but they remain the least informed and engaged areas along the line of route when it comes to Phase 1. On average 7% less stated that they have no information and do not want to receive any about Phase 1 than in January, rising to 13% less in Manchester and 12% less in Leeds and the Birmingham-Leeds bloc. However, two-fifths of line of route residents still state that they have no information on Phase 1 and they do not want any (41%), rising to almost half in Manchester and the Birmingham-Manchester bloc (47% each). Leeds remains the line of route city that is least informed on Phase 1 of HS2, with less than half having received information on Phase 1 (44%).

Birmingham city residents remain the group that is most likely to have received information already regarding both Phases of HS2 (at least 10% more likely than the average along the line of route to say that they have all the information they want in both cases). Only one fifth (21%) of Birmingham residents would like to receive information on Phase 1 of the project and an even smaller proportion (15%) would like to receive information on Phase 2.



Almost universally across the line of route, more residents are informed now about Phase 2 than they were in January: 12% less state that they have no information than in January 2013. This is particularly true amongst residents of the northern cities affected by Phase 2: 21% fewer Leeds residents and 19% fewer residents in the Birmingham-Leeds bloc state that they have no information than in January 2013. These Phase 2 areas are also more likely to want to receive more information regarding the extension of HS2 to Leeds and Manchester. 30% of residents in Manchester would like to receive more information (half of whom have already received some) and 29% of residents in Leeds feel the same way. In particular, only one third of Leeds residents state they have no information and do not want to receive any (34%), a fall of nearly one fifth since January 2013 (19% less).

Segments of residents who have already made up their mind about HS2 are the most satisfied with the amount of information they already have: 100% of those that are already *broadly supportive* say they have all the information they need regarding Phase 1 and 83% of that group have all the information they need regarding Phase 2. However, the vast majority of those who are *disengaged but not opposed* are uninterested in receiving any information regarding either Phase (96% with regard to Phase 1 and 97% for Phase 2).

Those living on the line of route are 10% more likely to have received all the information they want about High Speed 2 than the general public (34% against 24% for Phase 1 and 31% against 21% for Phase 2). However, members of the general public are more likely to have received information on HS2 than they were in January of this year. Female members of the general public are considerably less engaged with HS2 than men are: 39% of women say that they have no information about Phase 2 but do not want to receive any, compared with 28% of men.

More than two-fifths (42%) of the general public would like to receive more information regarding the London-Birmingham leg of HS2. At least half of the general public living in London and the West Midlands would like more information (54% and 50% respectively). Nearly half of the general public (45%) would like to receive more information regarding Phase 2, rising to 56% among residents of the North West, 55% amongst Londoners and 53% amongst residents of Yorkshire.



Q.3.a) Can you recall seeing any information or coverage about High Speed 2 over the past month? [All those who are aware of either Phase 1 or Phase 2]

	Line of Route Total	Location on Route						
		London	B'ham	Man-chester	Leeds	London-B'ham	B'ham – M'chester	B'ham - Leeds
Yes and I paid some attention to it	44%	39%	42%	40%	50%	46%	45%	49%
Yes but I didn't pay much attention to it	19%	17%	23%	24%	17%	19%	20%	19%
No	37%	44%	36%	36%	33%	35%	35%	33%

	Segment						
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed	
Yes and I paid some attention to it	58%	42%	52%	20%	39%	56%	
Yes but I didn't pay much attention to it	12%	16%	17%	27%	24%	16%	
No	30%	42%	31%	53%	37%	27%	

	General Public			
	Total	Male	Female	Take the Train to Work
Yes and I paid some attention to it	47%	52%	41%	54%
Yes but I didn't pay much attention to it	34%	30%	39%	30%
No	19%	18%	20%	15%

Members of the general public are on average marginally more likely to recall having seen some information or coverage about High Speed 2 and to have paid some attention to it over the past month than residents along the line of route (47% against 44% of line of route residents). Only one fifth (19%) of line of route residents recall seeing some information but not paying much attention to it, whereas this applies to one third (34%) of the general public.

Londoners are the least likely of line of route residents to have seen any coverage or information on HS2 in the last month (44% have not). Residents in Leeds or in the Birmingham-Leeds bloc are more likely to have seen some coverage (only 33% in each have not) and are the most likely amongst line of route residents to have paid attention to this coverage (50% and 49 respectively).



With regard to segments, the majority of those who *have all the information they want* have received or seen information in the last month, and have paid attention to it. Therefore these segments, who are already decided on their feelings towards HS2, are well informed and engaged. 58% of those who *have the information they need and support HS2* and 56% of those who *have the information they need and oppose HS2*, have seen and paid attention to some HS2 information or coverage in the past month. In contrast, the majority of those who are *disengaged but not opposed* do not recall seeing any HS2 information or coverage in the past month (53%).

Q.3.b) And which of the following aspects of HS2 do you remember seeing or hearing about in the past month? [All those who recall seeing some information in the last month]

	Line of Route Total	Location on Route						
		London	B'ham	Man-chester	Leeds	London-B'ham	B'ham – M'chester	B'ham - Leeds
Shorter journey times/speed of the trains	87%	86%	94%	83%	92%	88%	85%	87%
Impact on the countryside	85%	80%	86%	84%	86%	92%	84%	86%
Connecting London, Midlands and the North together	82%	81%	90%	82%	87%	81%	77%	85%
Opposition among local residents/ campaigns against the project	81%	80%	94%	75%	84%	88%	77%	77%
Economic benefits of HS2/ jobs/ boosting growth/ rebalancing the economy	75%	78%	85%	63%	75%	74%	70%	76%
Cost/ time it would take to build	74%	72%	74%	70%	82%	75%	75%	75%
Details about the proposed route	66%	58%	72%	55%	78%	65%	66%	73%
Increasing capacity on the railway network	60%	63%	67%	50%	61%	56%	61%	61%
Other	7%	8%	9%	3%	6%	5%	7%	11%
Don't know	1%	2%	0%	6%	1%	<1%	0%	1%



	Segment					
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed
Shorter journey times/ speed of the trains	87%	85%	87%	87%	84%	96%
Impact on the countryside	81%	85%	87%	81%	83%	95%
Connecting London, Midlands and the North together	85%	79%	86%	81%	76%	87%
Opposition among local residents/ campaigns against the project	79%	78%	86%	76%	80%	87%
Economic benefits of HS2/ jobs/ boosting growth/ rebalancing the economy	82%	69%	86%	67%	67%	73%
Cost/ time it would take to build	76%	75%	73%	63%	74%	84%
Details about the proposed route	70%	66%	71%	54%	60%	70%
Increasing capacity on the railway network	73%	52%	65%	53%	54%	64%
Other	6%	8%	6%	8%	6%	11%
Don't know	2%	3%	<1%	1%	1%	0%

	General Public			
	Total	Male	Female	Take the Train to Work
Shorter journey times/ speed of the trains	76%	78%	74%	81%
Impact on the countryside	73%	73%	72%	61%
Opposition among local residents/ campaigns against the project	71%	73%	70%	68%
Cost/ time it would take to build	65%	67%	63%	56%
Connecting London, Midlands and the North together	62%	64%	60%	69%
Economic benefits of HS2/ jobs/ boosting growth/ rebalancing the economy	53%	60%	45%	59%
Details about the proposed route	46%	50%	43%	42%
Increasing capacity on the railway network	32%	36%	28%	27%
Other	3%	3%	3%	0%
None of these	1%	1%	1%	1%

The vast majority of line of route residents who have seen some information or coverage regarding HS2 in the past month recall there being comments or information on the speed of the trains and their reduced journey times (87%), HS2's impact on the countryside (85%), HS2 connecting London, the Midlands and the North together (82%) and opposition among local residents or campaigns against the project (81%). Three-quarters recall information on the economic and employment benefits (75%) and on the costs involved and the project time-frame (74%).

There are instances in which the general public's recollection of information regarding HS2 is more negative than that of line of route residents. Considerably fewer members of the general public who have seen some HS2 coverage recall there being information on HS2 connecting London, the Midlands and the North together than residents along the line of route (62% against 82%). Proportionally more members of the general public than line of route residents recall comments on the cost of HS2 and the time it will take to build compared with other aspects of HS2 coverage (represents the 4th most frequently recalled aspect amongst general public responses, compared to 6th amongst line of route responses). Female members of the general public are considerably less likely to recall information on the economic and employment benefits of HS2: 45% against 60% of men.

Those who oppose HS2 are more likely to recall negative information than supporters of HS2. It is hard to say which is influencing the other: someone who is opposed to HS2 already may be more likely to read and engage with negative press on the project, but then it may be that those who were previously undecided or unengaged have been persuaded by negative press and now fall within the opposed segment. 79% of those who *have the information they need and support HS2* recall seeing some information regarding opposition or campaigning against the High Speed Railway, rising to 87% amongst those who *have the information they need and oppose HS2*. Similarly, those who are opposed are more likely to recall some information on HS2's impact on the countryside (95% against 85% average) and the cost and time HS2 will take to build (84% against 74% average). Conversely, those who support are more likely to recall information on HS2's benefits to the economy and job market (82% against 75% average) and HS2 serving to increase the capacity of the railway network (73% against 60% average).



Favourability

Q.4. High Speed 2 is a scheme to build a High Speed Railway line linking London and Birmingham, extending to Leeds and Manchester. Overall, would you say you are in favour, undecided or against? [All respondents]

	Line of Route Total	Location on Route							Take the Train to Work
		London	B'ham	Man-chester	Leeds	London-B'ham	B'ham – M'chr	B'ham - Leeds	
NET: In Favour	45%	54%	38%	46%	46%	38%	38%	42%	66%
	-3%	+5%	-8%	-1%	-11%	+3%	-16%	-7%	+10%
Strongly in favour	15%	18%	10%	19%	17%	13%	10%	12%	24%
	-2%	+1%	-6%	+3%	-9%	0%	-8%	-5%	+4%
In favour	30%	37%	28%	26%	29%	25%	28%	29%	42%
	-1%	+5%	-2%	-5%	-2%	+3%	-9%	-3%	+6%
Undecided	40%	35%	40%	42%	37%	41%	44%	44%	25%
	+1%	-4%	+6%	-1%	-2%	+6%	+7%	+2%	-11%
Against it	8%	6%	9%	7%	9%	8%	9%	8%	6%
	+3%	+1%	+1%	+1%	+7%	-2%	+6%	+4%	+4%
Strongly against it	8%	5%	13%	6%	8%	14%	9%	7%	3%
	0%	-2%	+1%	+2%	+5%	-6%	+3%	+2%	-2%
NET: Against	15%	11%	22%	13%	17%	22%	18%	15%	9%
	+2%	-1%	+2%	+3%	+13%	-7%	+9%	+6%	+2%



	Segment					
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed
NET: In Favour	90%	59%	60%	50%	9%	0%
	-1%	-5%	+1%	-2%	-3%	0%
Strongly in favour	47%	18%	11%	13%	2%	0%
	-9%	-6%	-1%	+3%	+1%	0%
In favour	43%	40%	49%	37%	7%	0%
	+8%	0%	+2%	-5%	-4%	0%
Undecided	9%	36%	38%	49%	64%	11%
	0%	0%	0%	+2%	+1%	-3%
Against it	1%	3%	2%	1%	20%	24%
	+1%	+3%	0%	0%	+4%	+7%
Strongly against it	0%	2%	1%	<1%	7%	65%
	0%	+2%	0%	0%	-2%	-4%
NET: Against	1%	5%	3%	1%	27%	89%
	+1%	+5%	0%	0%	+2%	+3%

	General Public			
	Total	Male	Female	Take the Train to Work
NET: In Favour	41%	47%	35%	50%
	-7%	-9%	-6%	-9%
Strongly in favour	11%	15%	6%	19%
	-2%	-4%	-2%	-5%
In favour	30%	32%	29%	31%
	-5%	-6%	-4%	-4%
Undecided	43%	36%	49%	36%
	+1%	+4%	-3%	+3%
Against it	10%	10%	10%	4%
	+5%	+3%	+6%	+2%
Strongly against it	7%	7%	6%	10%
	+3%	+2%	+2%	+3%
NET: Against	16%	17%	16%	14%
	+7%	+5%	+9%	+5%

Just less than half of those living along the High Speed 2 line of route (45%) are in favour of HS2, which represents a marginal decrease since January 2013 (3%). However, those who commute by train are far more positive about HS2. Two-thirds of residents who commute by train (66%) are in favour, 10% more than in January of this year.

Residents in areas affected by Phase 2 feel much less favourable towards HS2 than they did in January, whilst residents in areas affected by Phase 1 are more in favour than they were in January of this year. The most significant decreases in favourability since January 2013 amongst line of route residents can be seen in the Leeds and Birmingham-Manchester geographical blocs (11% and 16% decreases respectively). Favourability has increased, however, since January in London (5%) and the London-Birmingham bloc (3%).

Two-fifths (41%) of the general public are in favour of HS2, a decrease of 7% since January. Again, those who commute by train feel more positive: half (50%) of this group are in favour. Men are more likely to be in favour of HS2 than women (47% against 35%).

We see very little change in opinion towards HS2 amongst the *broadly supportive* and *disengaged* segments (the biggest change being 2% NET). The greatest change in opinion has occurred amongst those who *want more information and are inclined to support* – 5% less are in favour and 5% more are now against HS2 compared to January of this year.



Q.5. 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? [All respondents] [% saying HS2 will have a positive impact]

	Line of Route Total	General Public Total	Line of Route and Take Train to Work
The Midlands	71%	71%	89%
	-1%	-1%	+6%
The North of England	69%	66%	76%
	-3%	0%	-9%
London	68%	63%	76%
	0%	-3%	-4%
The British Economy	61%	51%	77%
	-3%	-3%	+7%
Your local area	40%	16%	41%
	+3%	-5%	+10%
You personally	33%	15%	47%
	0%	-4%	-9%

	Segment					
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed
The Midlands	96%	83%	86%	82%	48%	7%
	-2%	-3%	-9%	0%	+4%	-2%
The British Economy	92%	74%	72%	76%	32%	7%
	-6%	-5%	-7%	-1%	+7%	+3%
The North of England	95%	81%	83%	79%	46%	12%
	-2%	-5%	-9%	-3%	0%	+2%
London	83%	79%	74%	77%	51%	27%
	-8%	-3%	-7%	-1%	+7%	+15%
You personally	59%	52%	32%	36%	12%	1%
	-12%	-3%	+3%	+3%	+6%	+1%
Your local area	71%	55%	34%	48%	18%	2%
	0%	+3%	-8%	+9%	+7%	+1%

One third of line of route residents (33%) believe that HS2 will impact positively on them personally, rising to 47% of those who commute by train, and two-fifths believe that the project will

impact positively on their local area. These are the only two areas in which more residents believe HS2 will have a positive impact than in January. The majority of line of route residents who *have the information they need and support HS2* and who *want more information but are inclined to support* foresee HS2 having an impact on their life (59% and 52% respectively) and their local area (71% and 55% respectively). However, only 1% of those who *have the information they need and are opposed to HS2* foresee their lives being impacted positively by HS2.

Three-in-five line of route residents (61%) think that HS2 will have a positive impact on the British economy, representing a 3% decrease since January 2013. However, over three-quarters (77%) of line of route residents who commute by train believe that HS2 will impact positively on the economy, representing an increase of 7% since January. Although only one third of those who *want no more information and are currently undecided* (32%) believe that HS2 will impact positively on the economy, there has been a positive change of 7% in this group since January. The considerable majority of all other segments, apart from those who are *opposed and want no more information* believe that HS2 will have a positive impact on the economy.

Line of route residents and members of the general public are most convinced of HS2's positive impact on different regions of the country. Seven in ten believe that the Midlands will see a positive impact at the hands of HS2 (71% line of route and general public each) and approximately two-thirds see the North and London being impacted on positively (69% and 68% line of route respectively, 66% and 63% general public respectively). Even amongst those who are *opposed and want no more information*, over a quarter (27%) believe HS2 will have a positive impact on London, representing a 15% increase since January 2013. Interestingly, Londoners are the most convinced of the positive impact on all three regions: line of route residents in the Midlands are no more convinced of HS2's positive impact on the Midlands and Northerners are no more convinced of its positive impact on the North.



Q.6. 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?

	Line of Route Total	Location on Route							Take the Train to Work
		London	B'ham	Man- chester	Leeds	London- B'ham	B'ham – M'chr	B'ham - Leeds	
Overall, the benefits will be greater than the costs	21%	29%	19%	24%	14%	16%	18%	18%	36%
The costs and benefits will be about the same	38%	37%	44%	36%	37%	38%	33%	41%	33%
Overall, the costs will be greater than the benefits	35%	28%	34%	33%	46%	39%	40%	36%	25%

	Segment					
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed
Overall, the benefits will be greater than the costs	57%	31%	24%	18%	3%	<1%
The costs and benefits will be about the same	30%	39%	45%	50%	33%	11%
Overall, the costs will be greater than the benefits	10%	22%	25%	23%	58%	87%

	General Public							
	General Public Total	Age						Take Train to Work
		18-24	25-34	35-44	45-54	55-64	65+	
Overall, the benefits will be greater than the costs	29%	34%	36%	31%	27%	27%	22%	40%
	-5%	+2%	-4%	-8%	-7%	+1%	-11%	-14%
The costs and benefits will be about the same	24%	29%	27%	27%	25%	16%	21%	16%
	-3%	-10%	-3%	-2%	0%	-7%	+2%	+2%
Overall, the costs will be greater than the benefits	47%	37%	37%	42%	48%	57%	57%	45%
	+8%	+8%	+7%	+10%	+8%	+6%	+9%	+14%



Among both line of route residents and the general public more people believe that the costs of HS2 will outweigh the benefits. A third (35%) of line of route residents believe the costs will be greater, compared to just 21% who think the benefits will outweigh be. Almost half (47%) of the general public think the costs will outweigh the benefits, up 8% from the first wave, with 29% believing the reverse.

Amongst those who are *broadly supportive but resistant to further persuasion*, almost half believe that the costs and benefits of HS2 will be about the same (45%) and equal proportions believe the benefits will outweigh the costs and vice versa (24% and 25% respectively). Amongst those who are *disengaged but not opposed*, 5% more believe that the costs will be more significant than the benefits than vice versa (23% against 18%).



The Economy

Q.7. How much do you agree or disagree with each of the following statements? [All respondents] [% who agree]

	Line of Route	General Public Total	Line of Route and Take Train to Work
It would create jobs and growth directly through its construction and operation	85%	73%	91%
	-2%	-2%	0%
Large-scale infrastructure projects in Britain always go over time and over-budget	77%	77%	73%
	+2%	+6%	-1%
It's right that we spend money on national infrastructure, even in tough economic conditions, as the country still has to plan for the future	73%	57%	93%
	-4%	-3%	+12%
It would generate jobs and growth indirectly by bringing Britain closer together	68%	52%	73%
	-4%	-5%	-4%
It would help boost the economy in cities and regions outside of London	65%	53%	77%
	-4%	-5%	-1%
Our railways are nearly full to bursting now, so we need a new line to connect our major cities together	65%	55%	74%
	-3%	-6%	-2%
It is only really business travellers, not ordinary people, who would benefit from High Speed 2	49%	53%	38%
	+4%	+7%	+2%
High Speed 2 would destroy the countryside	49%	46%	35%
	+6%	+7%	+2%
Britain can't afford to invest in a High Speed Railway line at this time	48%	44%	22%
	+4%	+3%	-28%
It is only really London that would benefit from High Speed 2	29%	29%	16%
	+4%	+2%	-4%



	Segment					
	Support Already	Inclined to support	Broadly supportive	Disengaged	Undecided	Opposed
It would create jobs and growth directly through its construction and operation	97%	93%	94%	91%	72%	56%
	-1%	-3%	-2%	-4%	+1%	+8%
Large-scale infrastructure projects in Britain always go over time and over-budget	67%	68%	75%	74%	87%	92%
	-3%	-6%	+6%	-1%	+10%	+5%
It's right that we spend money on national infrastructure, even in tough economic conditions, as the country still has to plan for the future	95%	81%	84%	75%	57%	43%
	-2%	-11%	-5%	-6%	+5%	-2%
It would generate jobs and growth indirectly by bringing Britain closer together	96%	82%	76%	83%	43%	9%
	-3%	-5%	-8%	-2%	+2%	-2%
It would help boost the economy in cities and regions outside of London	95%	79%	81%	76%	37%	7%
	-3%	-2%	-5%	-4%	-4%	+1%
Our railways are nearly full to bursting now, so we need a new line to connect our major cities together	91%	76%	76%	70%	43%	24%
	-4%	+5%	-3%	-9%	0%	+5%
It is only really business travellers, not ordinary people, who would benefit from High Speed 2	5%	44%	42%	34%	85%	91%
	-14%	+13%	+1%	-8%	+16%	+16%
High Speed 2 would destroy the countryside	24%	37%	42%	39%	71%	89%
	+7%	+6%	0%	+3%	+9%	-1%
Britain can't afford to invest in a High Speed Railway line at this time	5%	41%	35%	38%	82%	94%
	-9%	+9%	+5%	-4%	+13%	+6%
It is only really London that would benefit from High Speed 2	6%	24%	15%	20%	50%	64%
	0%	+6%	0%	-5%	+7%	+15%

Both residents along the line of route and the general public believe that HS2 will create jobs and growth directly through its construction and operation (85% of line of route residents and 73% of the public). 68% of line of route residents and 52% of the general public also believe that HS2 will contribute to economic growth indirectly.

65% of line of route residents agree that HS2 will help boost the economy outside of London, with 53% of the general public agreeing this will be the case. Only three in ten line of route respondents and members of the general public (29% each) believe that London is the only part of Britain that will truly benefit from the introduction of the High Speed Railway.



Though three-quarters (77%) of line of route residents think that large-scale British infrastructure projects always take longer than planned and cost more than originally budgeted, 73% agree that the government should spend money on national infrastructure, even in times of economic difficulty, in order to plan for the future.

To many, a new railway line seems necessary: over half of the general public (55%) agree that our railways are now overcrowded to the point that a new line should be built, rising to 65% of residents on the line of route and three-quarters of residents on the line of route who take the train to work (74%).

Less than half (48%) of line of route residents believe that Britain cannot afford to invest in a High Speed Railway line at the moment. However, this increases to over half (55%) of those in social grade 'DE'. Line of route residents who commute by train feel notably more positive in this regard than they did in January 2013: the proportion who believe that Britain cannot afford to invest in this project has more than halved since January (dropped from 50% to 22%).

The implications of HS2 on the countryside are more important to those living along the line of route than those living in the four major destination cities. Half of those living along HS2 routes (49%) believe that HS2 will destroy the countryside, representing a 6% increase since January 2013. The majority of those living in the London-Birmingham geographic bloc (54%), the Birmingham-Leeds bloc (53%) and the Birmingham-Manchester bloc (50%) feel HS2 will ruin the countryside. Women are also more likely to agree that HS2 would destroy the countryside (55% compared to 42% of men).

