

# High Speed 2 Polling – Wave 2 Line of Route and General Public March 2013



## Methodology & overview

### Line of route survey

- **Wave 1:** 2,000 interviews conducted by telephone between 11<sup>th</sup> and 20<sup>th</sup> January 2013
- **Wave 2:** 2,001 interviews conducted by telephone between 7<sup>th</sup> and 11<sup>th</sup> March 2013
- Taken from a random sample of residents living within 10 miles of the proposed route
- 7 geographical blocs:
  - London, Birmingham, Leeds and Manchester
  - London - Birmingham route, Birmingham - Leeds route, Birmingham - Manchester route
- The number of interviews in each location reflects the balance of population along the line of route & the sample has been weighted to be demographically representative

### General public survey

- **Wave 1:** 2,013 interviews conducted online between 18<sup>th</sup> and 20<sup>th</sup> January 2013
- **Wave 2:** 2,058 interviews conducted online between 6<sup>th</sup> and 8<sup>th</sup> March 2013
- Nationally representative of GB adult population



## Explaining the segmentation

### What is it?

- Segmentation analysis identifies clusters of respondents who hold similar views towards an issue.

### Why use it?

- Broad demographic features like age will contain people with a range of different attitudes, which can make it harder to identify different strands of opinion. By segmenting people based on their attitudes we can see differences in opinion more clearly.

### How it works

- People tend to answer different questions quite consistently – if they answer X at Q1, they are more likely to answer Y at Q2. Segmentation analysis identifies the strongest correlations between answers to different questions and creates segments based on these.

### Segments in this study

- 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 falls into are their level of support for HS2 (Q4) and the amount of information they want to receive about it (Q2).



## There has been a slight increase in the proportion of people who are inclined to support HS2

### Segment proportions in Wave 2

#### Shorthand Segment Titles

##### Support already

14%, 2,910,000 adults

##### Inclined to support

16%, 3,326,000 adults

##### Broadly supportive

16%, 3,326,000 adults

##### Disengaged

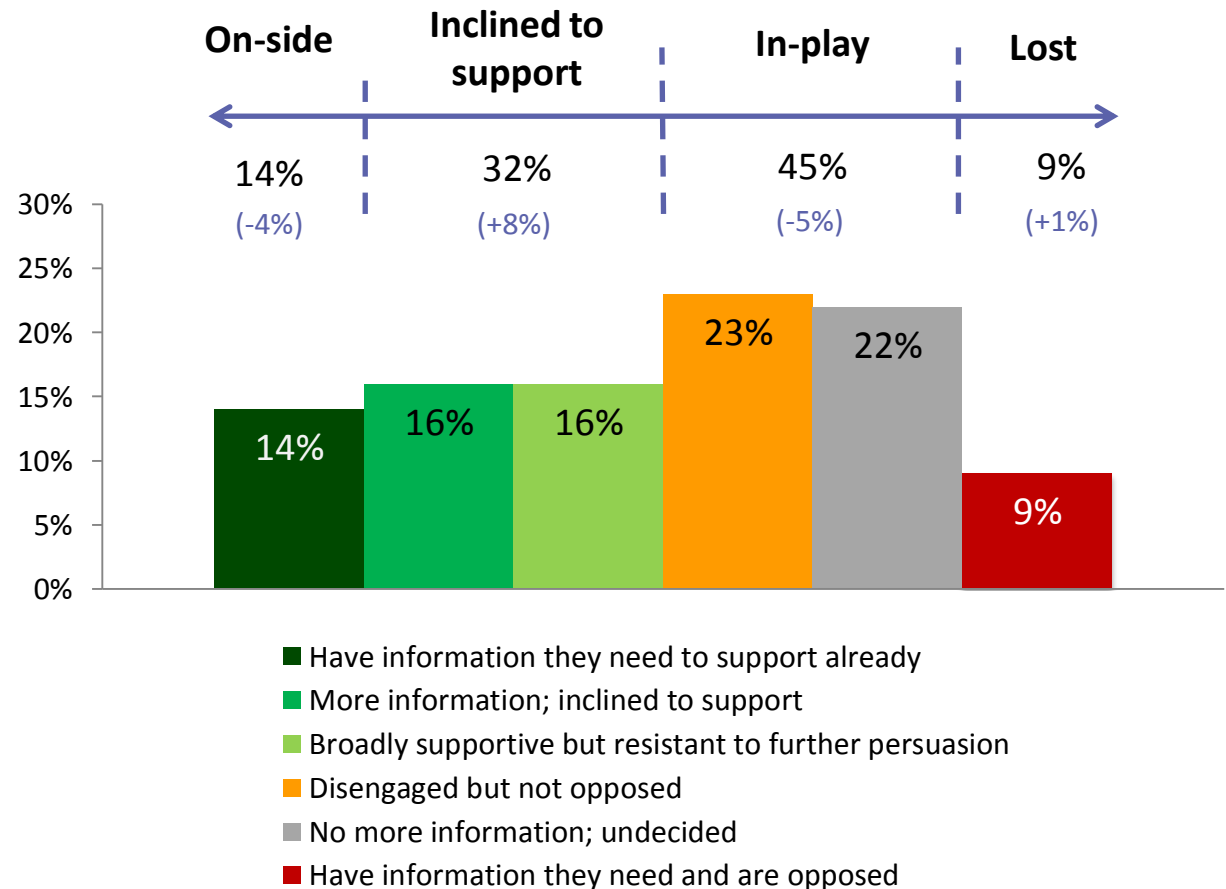
23%, 4,782,000 adults

##### Undecided

22%, 4,574,000 adults

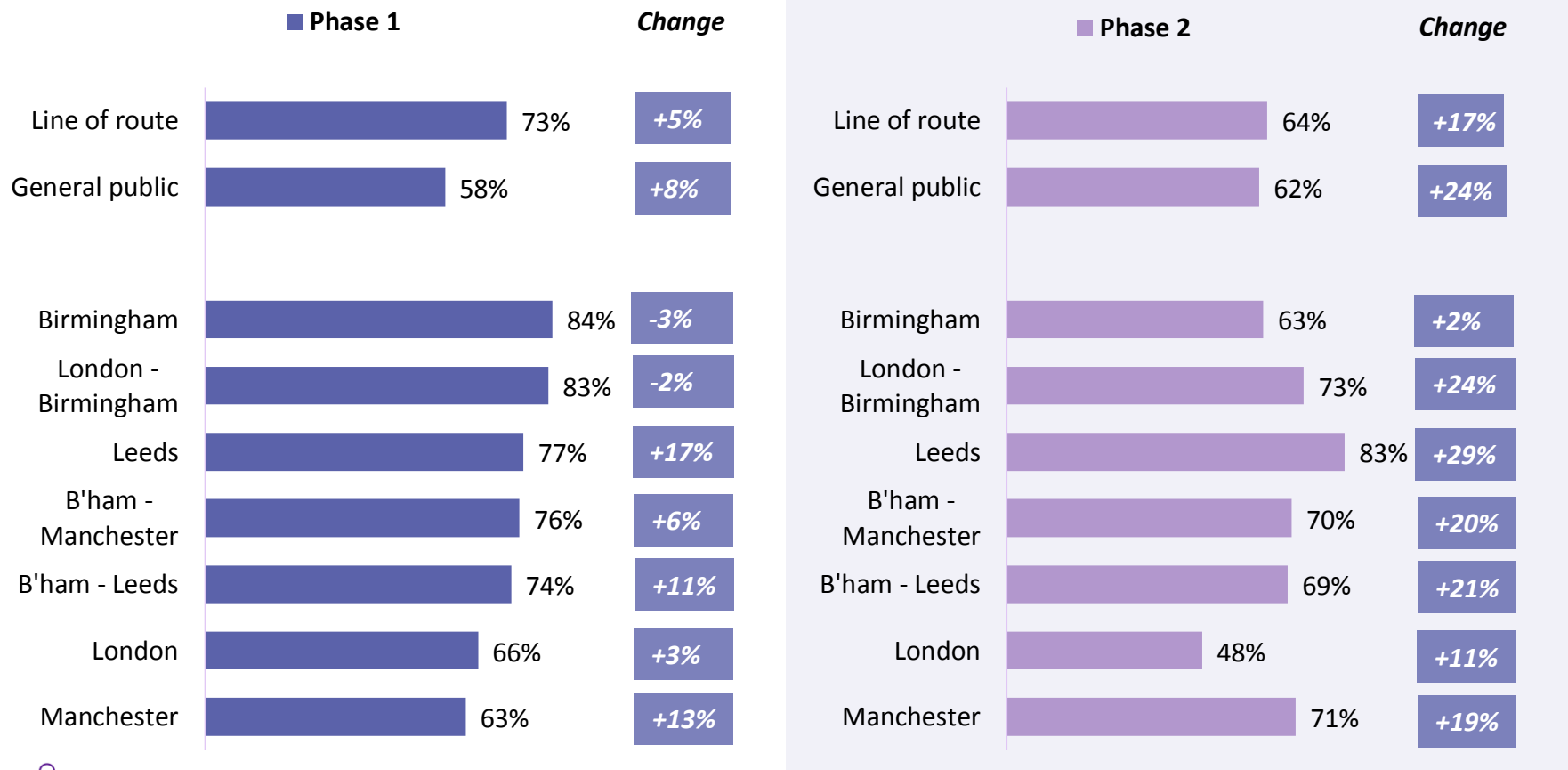
##### Opposed

9%, 1,871,000 adults



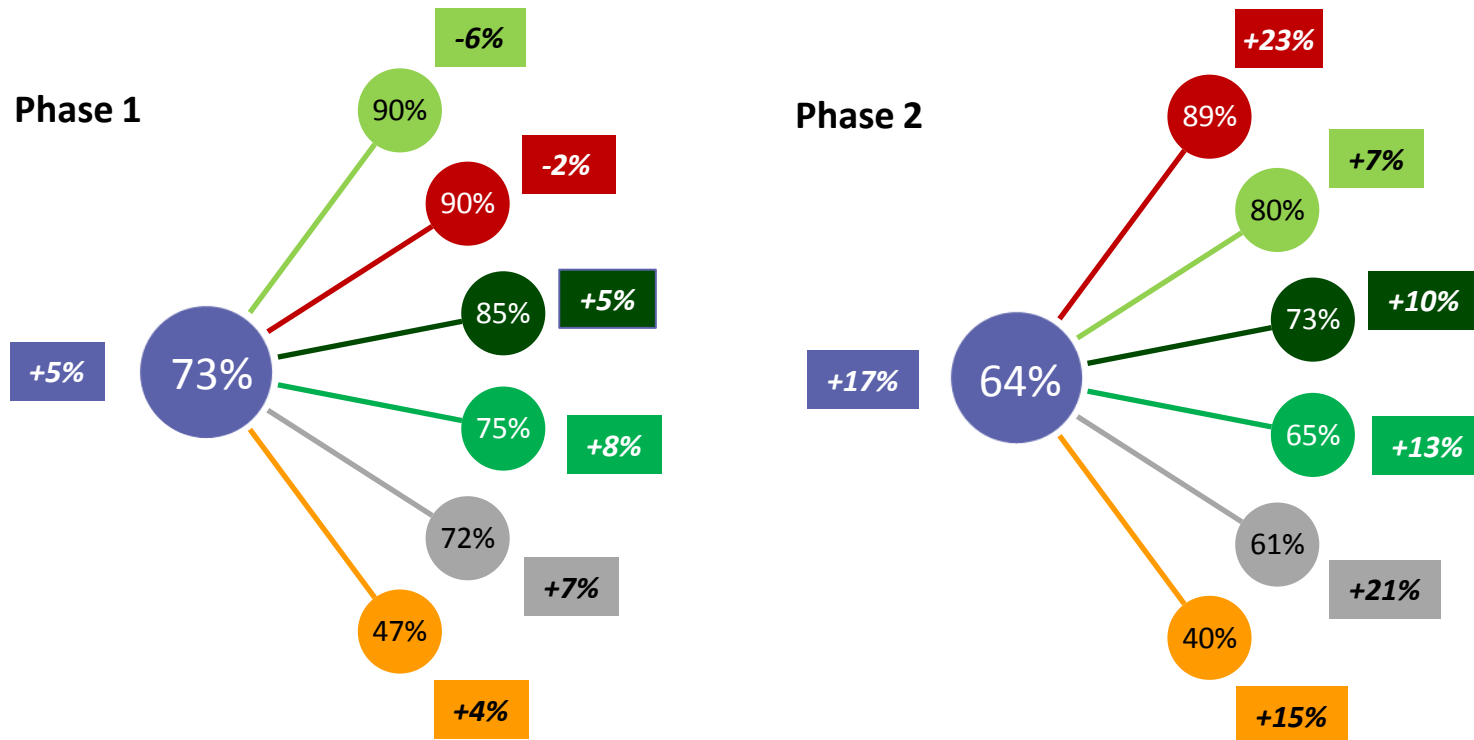
## Awareness of Phase 2 has increased significantly, with increases of more than 20% in many places

### % of people who are aware of HS2 Phases 1 and 2



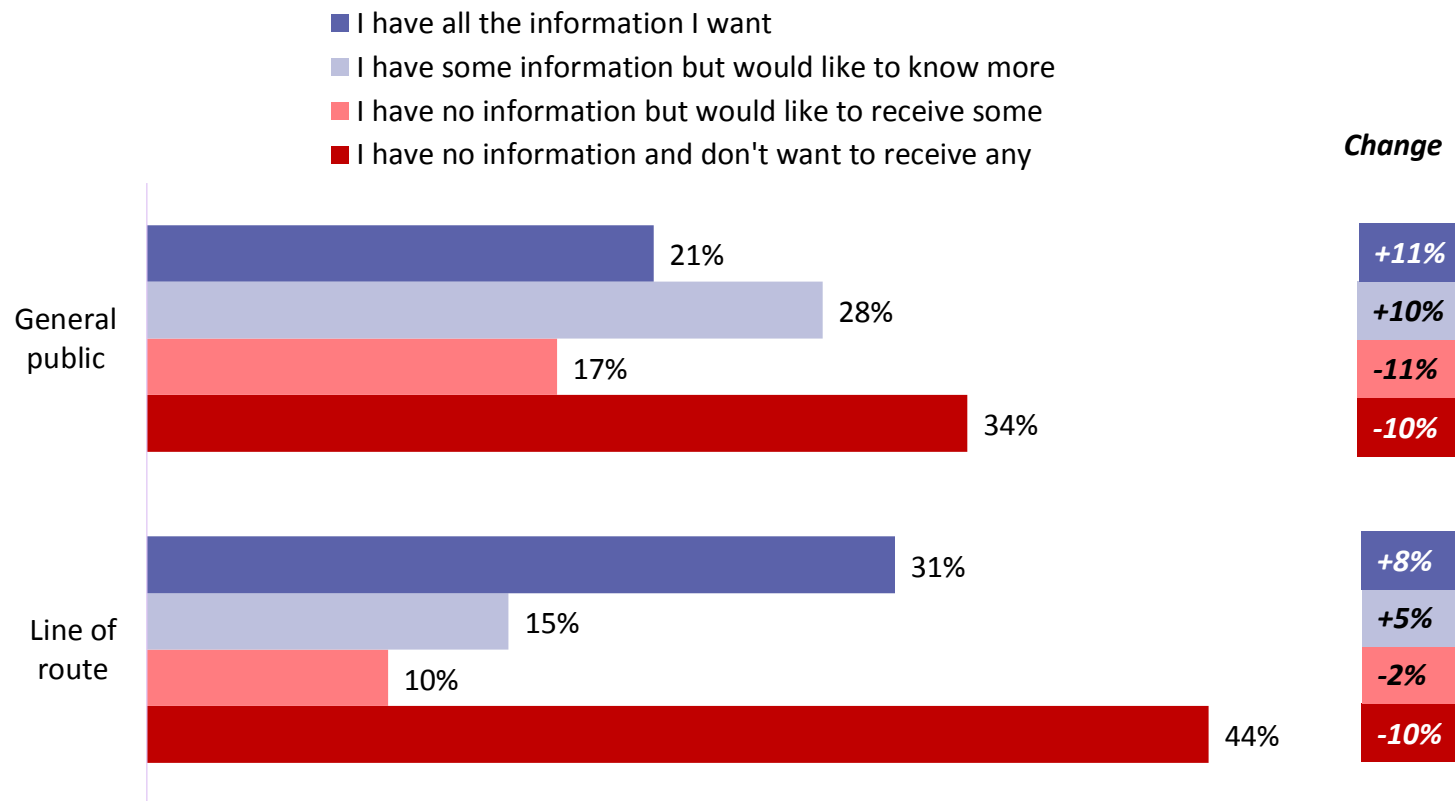
## Segments that are 'in-play' or 'opposed' to HS2 have seen the biggest increases in awareness of Phase 2

% of each segment who are aware of HS2 Phases 1 and 2



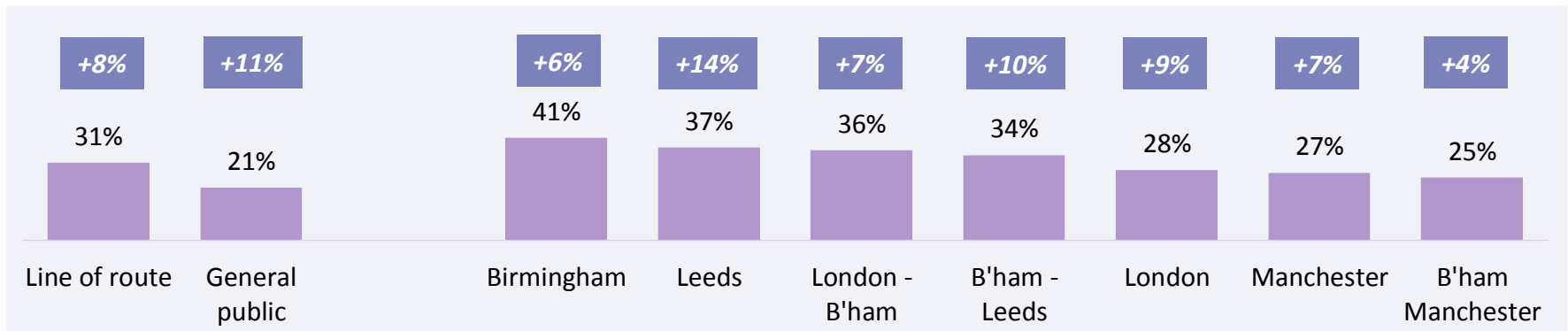
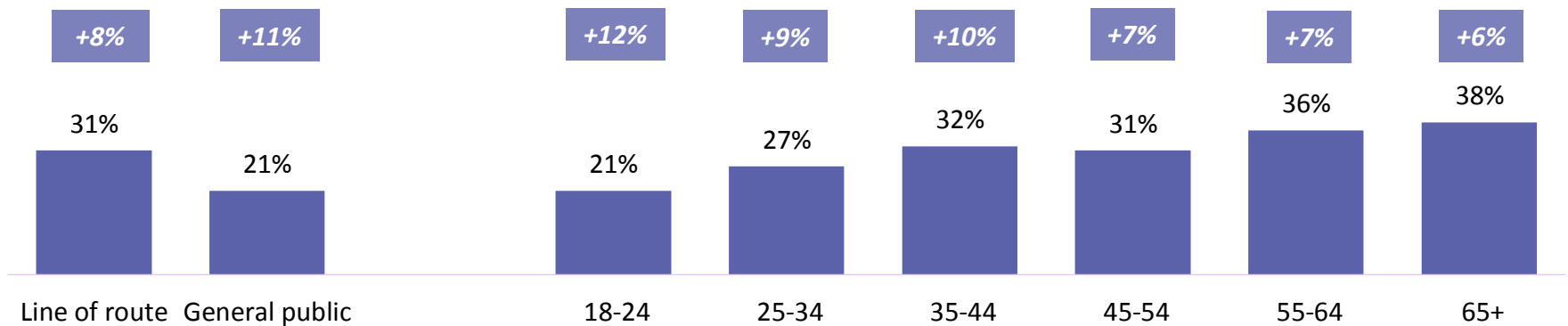
## Many of the people who have recently been made aware of HS2 say they do not want any more information about it

### How well informed do people feel about phase 2 and how much information they would like to receive about them?



## Older residents are more likely to feel they have all the information they want, as are those Birmingham and Leeds

**% of people who say they have all the information they want about phase 2 of HS2**

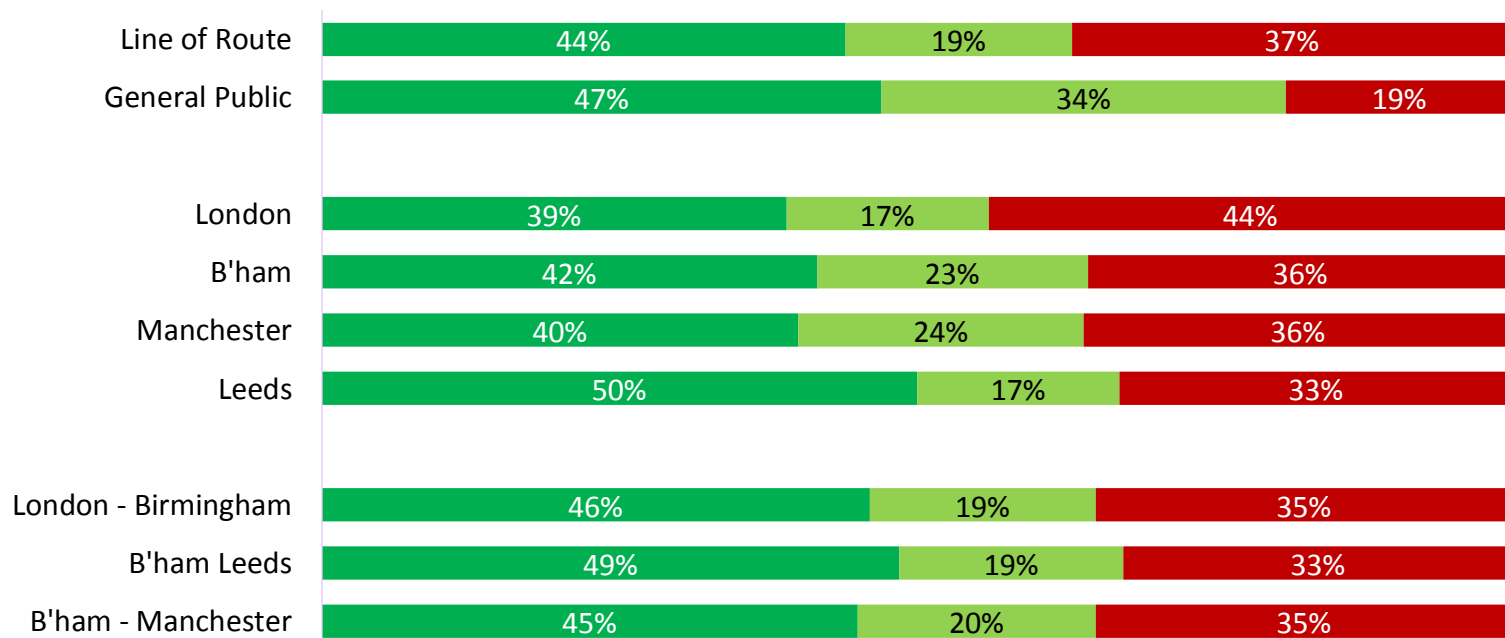




## Just under half of line of route residents and the general public recall seeing coverage of HS2 in the past month and paid attention to it

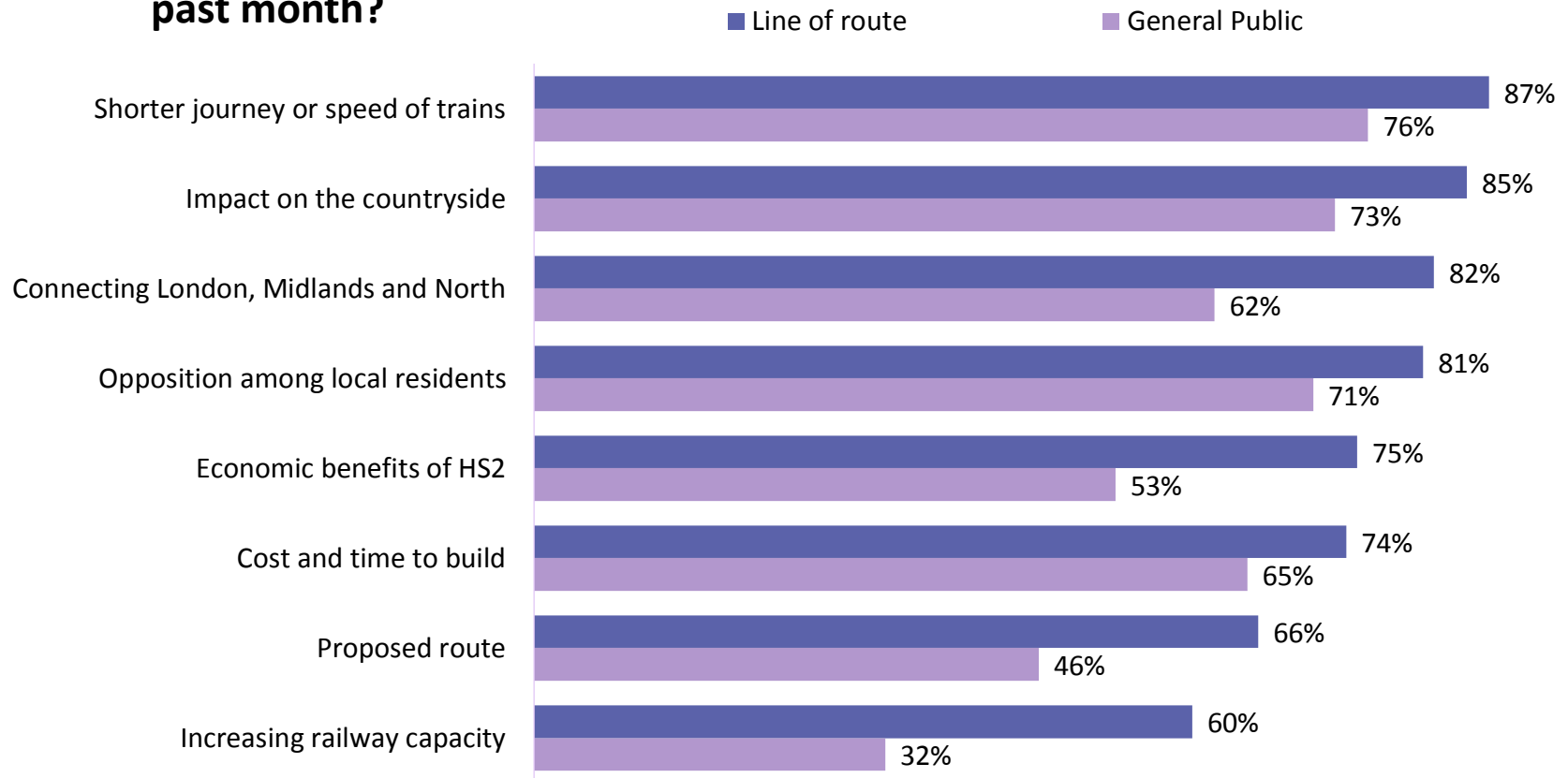
### Recall of information or coverage about HS2 in the past month

- Recall seeing information / coverage about HS2 and paid some attention to it
- Recall seeing information / coverage about HS2 but did not pay much attention to it
- Do not recall seeing information / coverage about HS2



## Line of route residents are much more likely to recall information about the economic and connectivity benefits of HS2

### Which aspects of HS2 coverage have people seen or heard about over the past month?

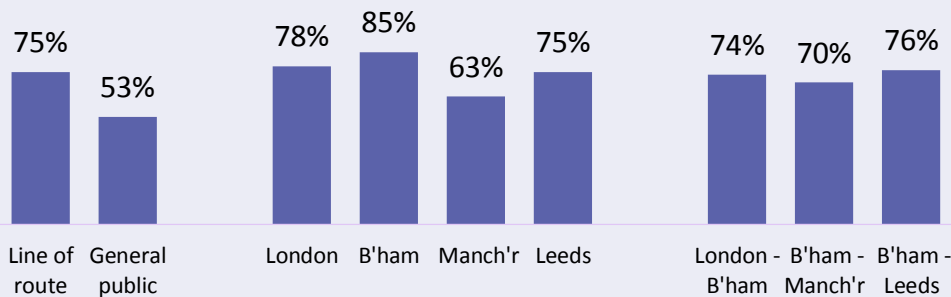


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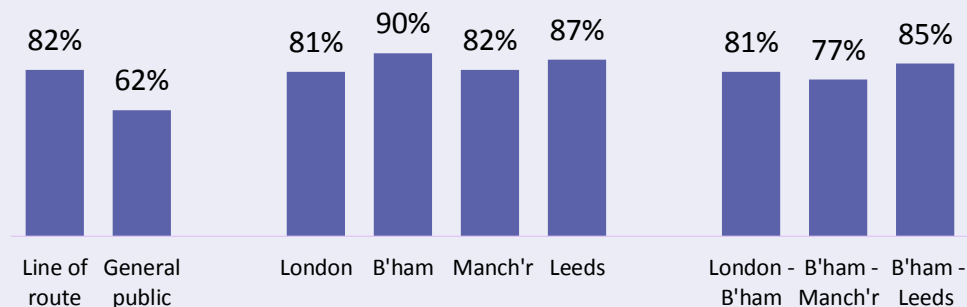
Base: All respondents who recall seeing any information or coverage about High Speed 2 over the past month on line of route (1,136) & General public (1,335)

## Residents in Birmingham are the most likely to recall both positive and negative coverage

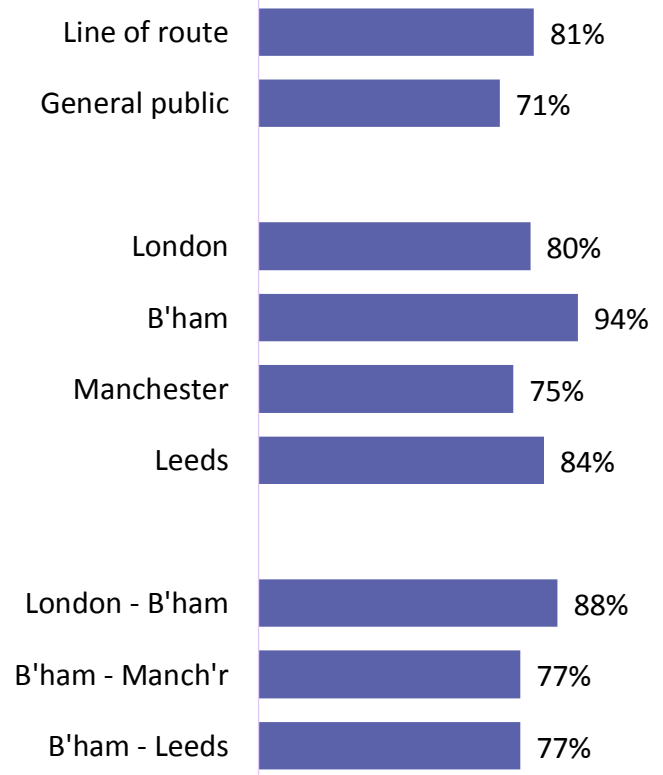
### % seen coverage of 'economic benefits of HS2' by location



### % seen coverage of 'connecting London, Midlands and the North' by location



### % seen coverage of 'opposition campaigns' by location



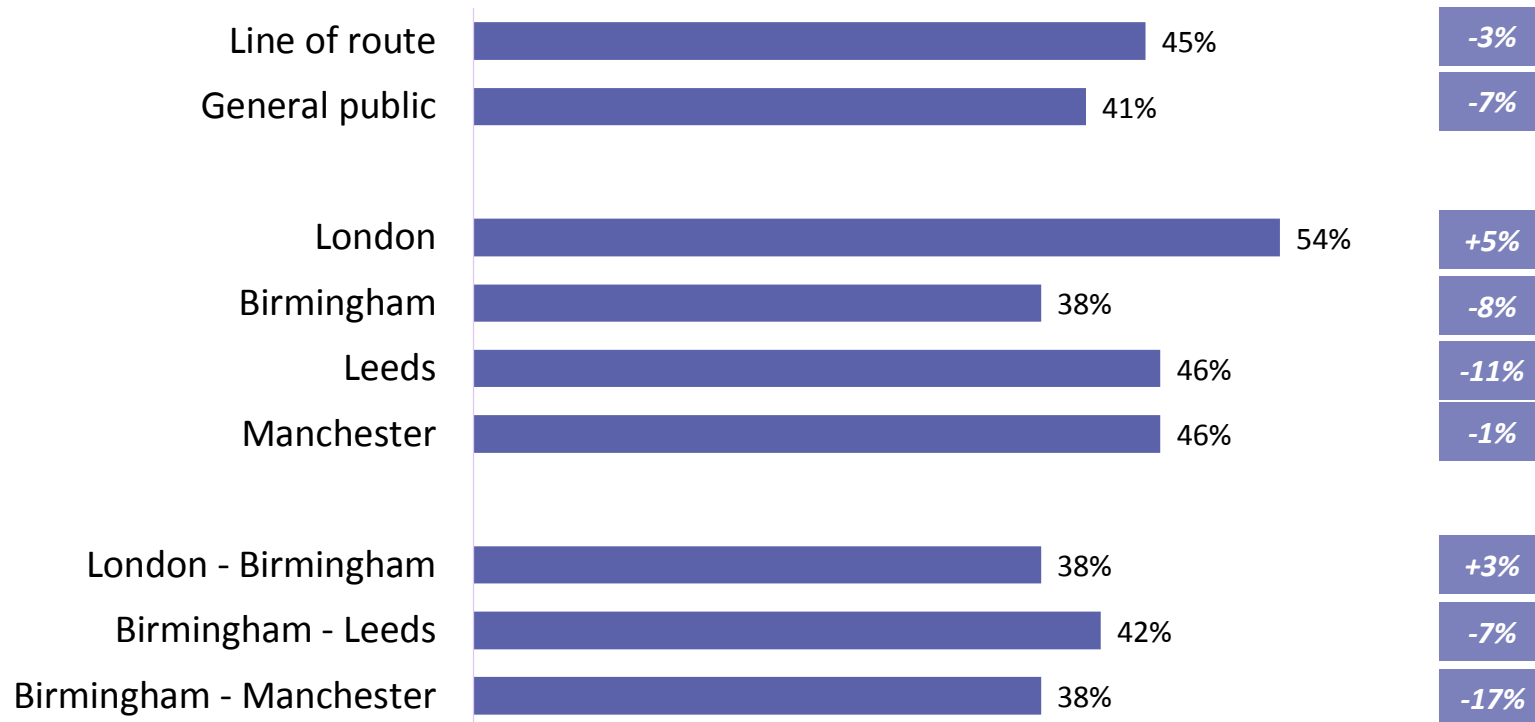
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Base: All respondents who recall seeing any information or coverage about High Speed 2 over the past month on line of route (1,136) & General public (1,335)

## Support for High Speed 2 has dropped among both line of route residents and the general public

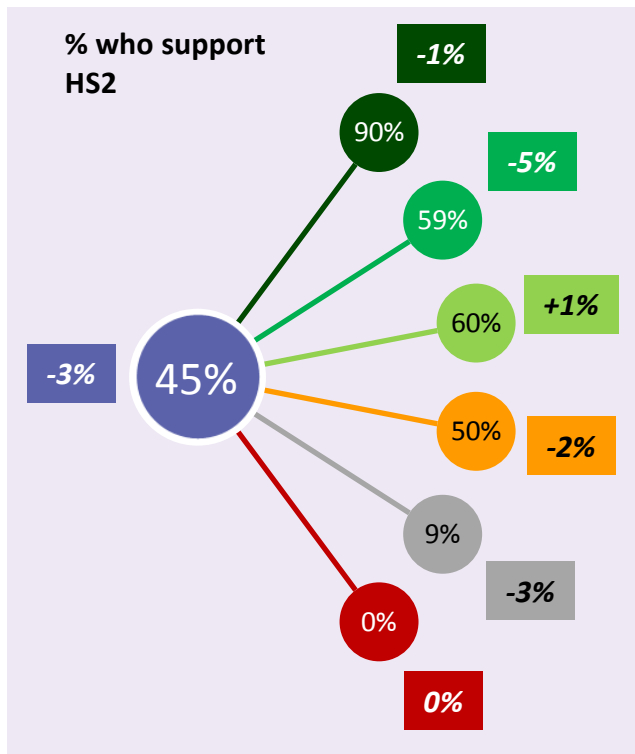
### % in favour of HS2

### Change

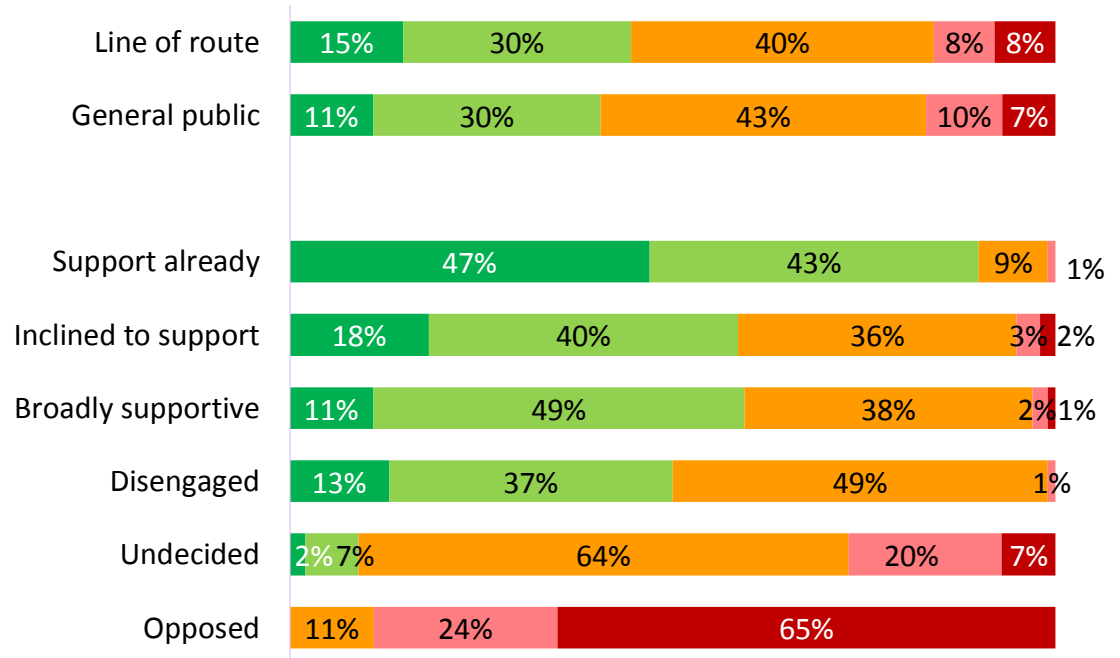


# The segment “inclined to support” has seen the biggest drop in support since January

## Opinion of HS2



Legend: Strongly in favour (dark green), In favour (light green), Undecided (orange), Against it (pink), Strongly against it (red)



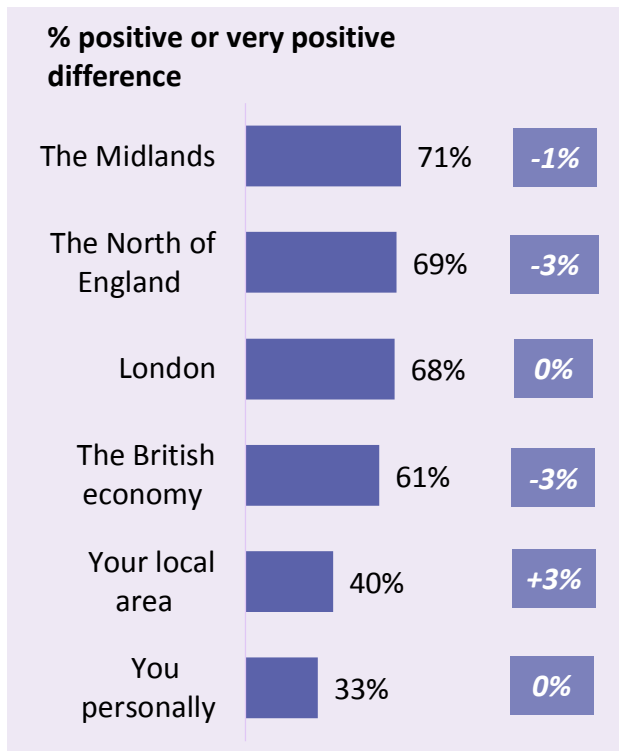
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Base: Wave 2 Line of route (2,001) & General public (2,058)

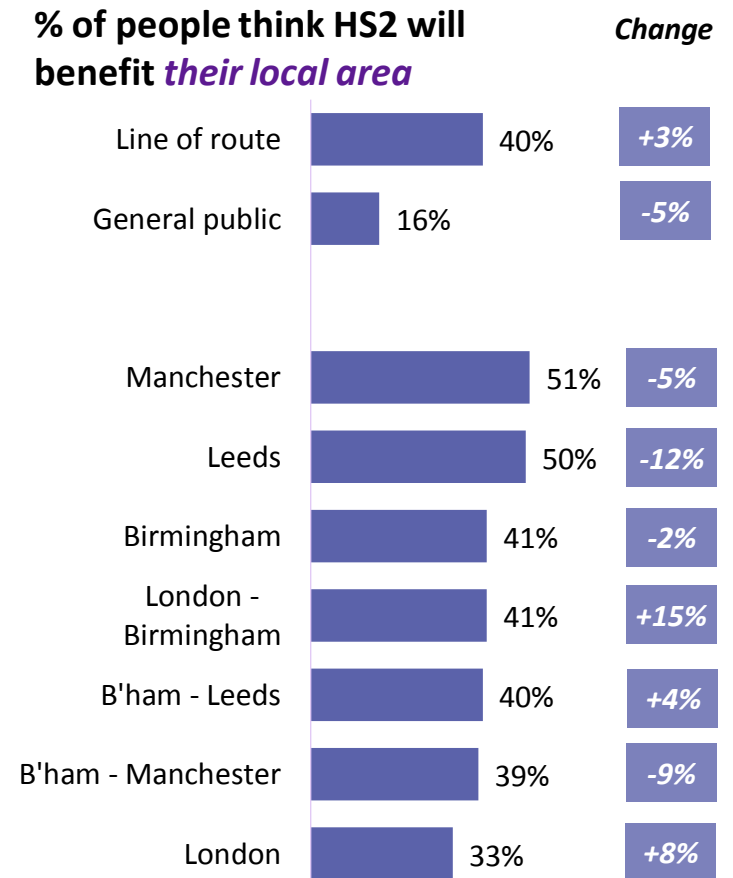
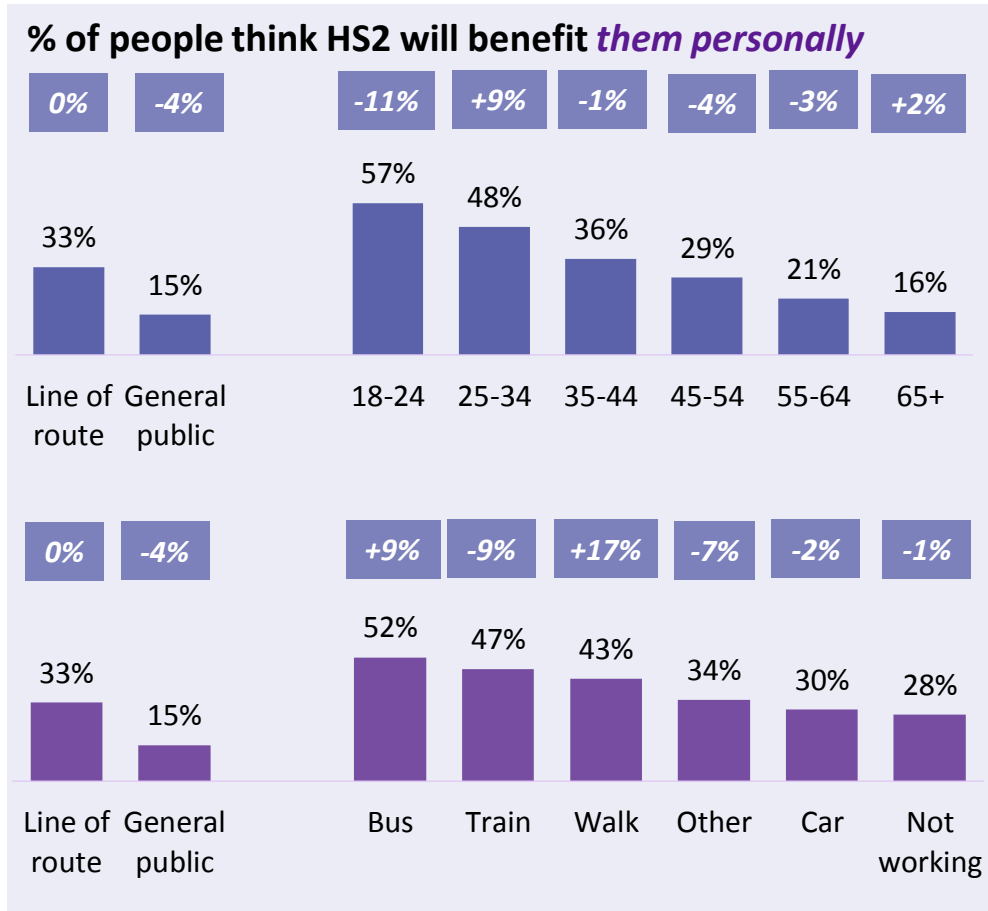
Legend for stacked bars:  
 On-side: Support already (dark green), Inclined to support (light green), Broadly supportive (orange)  
 In-play: Disengaged (pink), Undecided (red)  
 Lost: Opposed (dark red)

# Residents along the proposed route believe the Midlands and North of England will benefit the most from HS2

## Perceived impact of HS2 on...

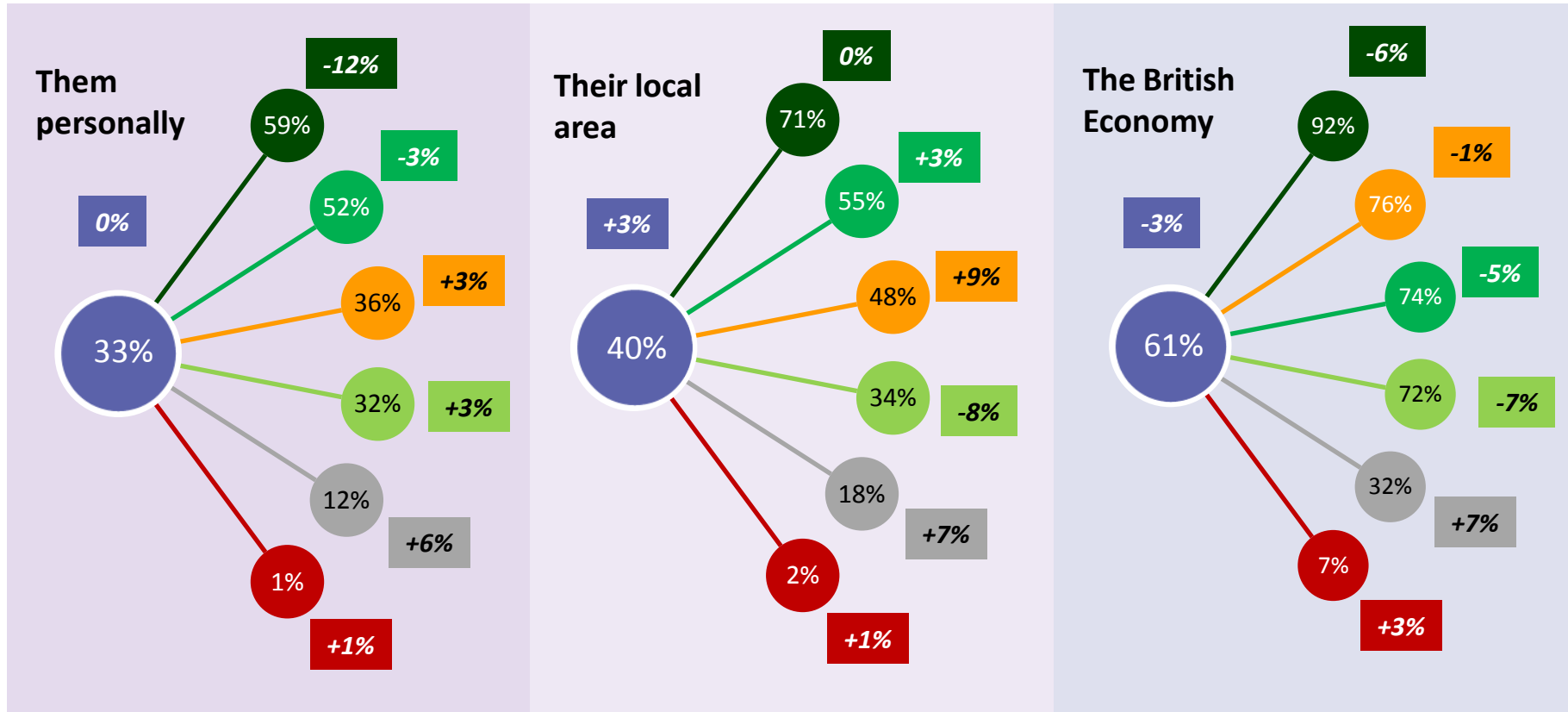


# Residents in Leeds and Manchester are the most likely to think HS2 will benefit their area



# Most segments feel that even if the HS2 will not benefit them personally, it will help the British economy

% of people who think HS2 will benefit...



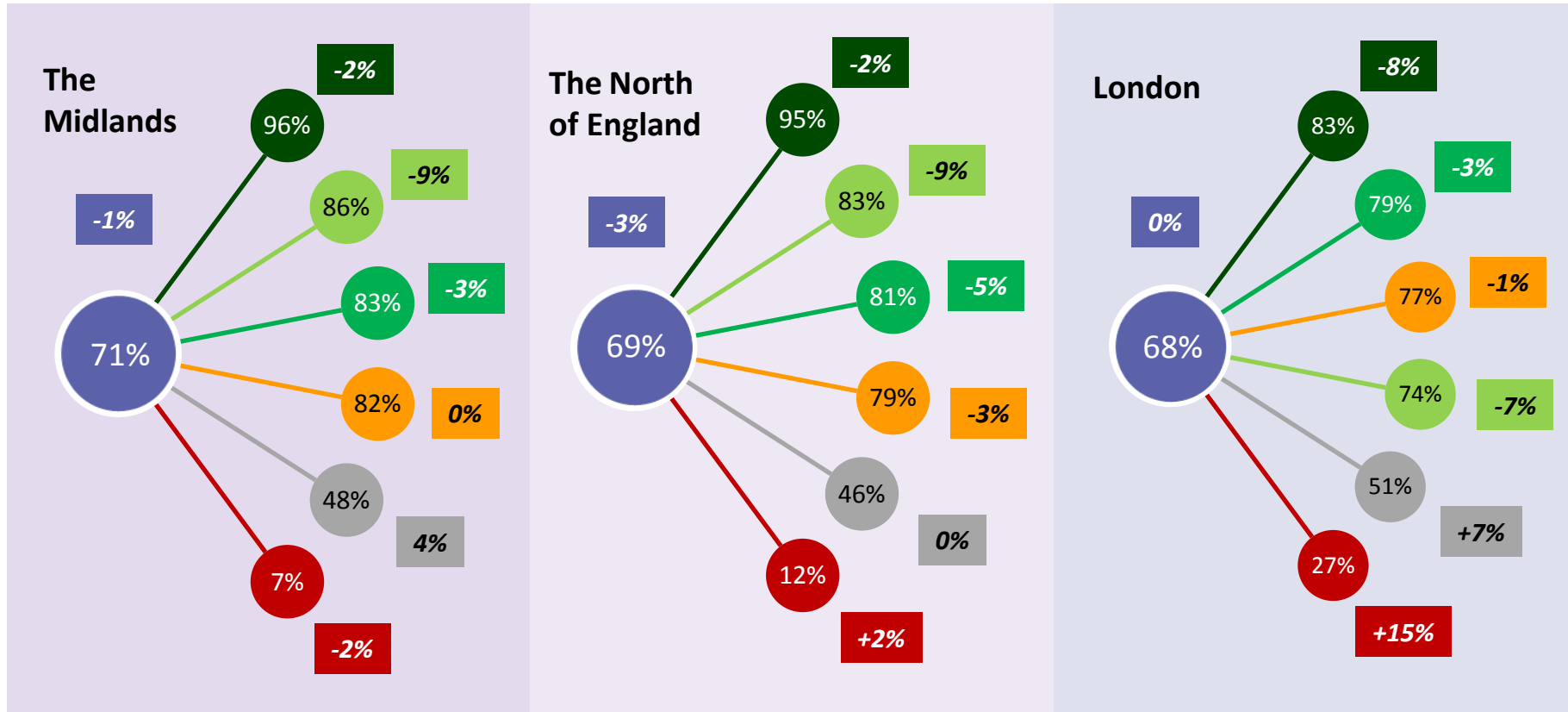
p16 Base: Wave 2 Line of route (2,001)

- Line of route
- On-side {
  - Support already
  - Inclined to support
  - Broadly supportive
- In-play {
  - Disengaged
  - Undecided
  - Opposed
- Lost {



# However, most people think that individual regions will be the biggest beneficiaries

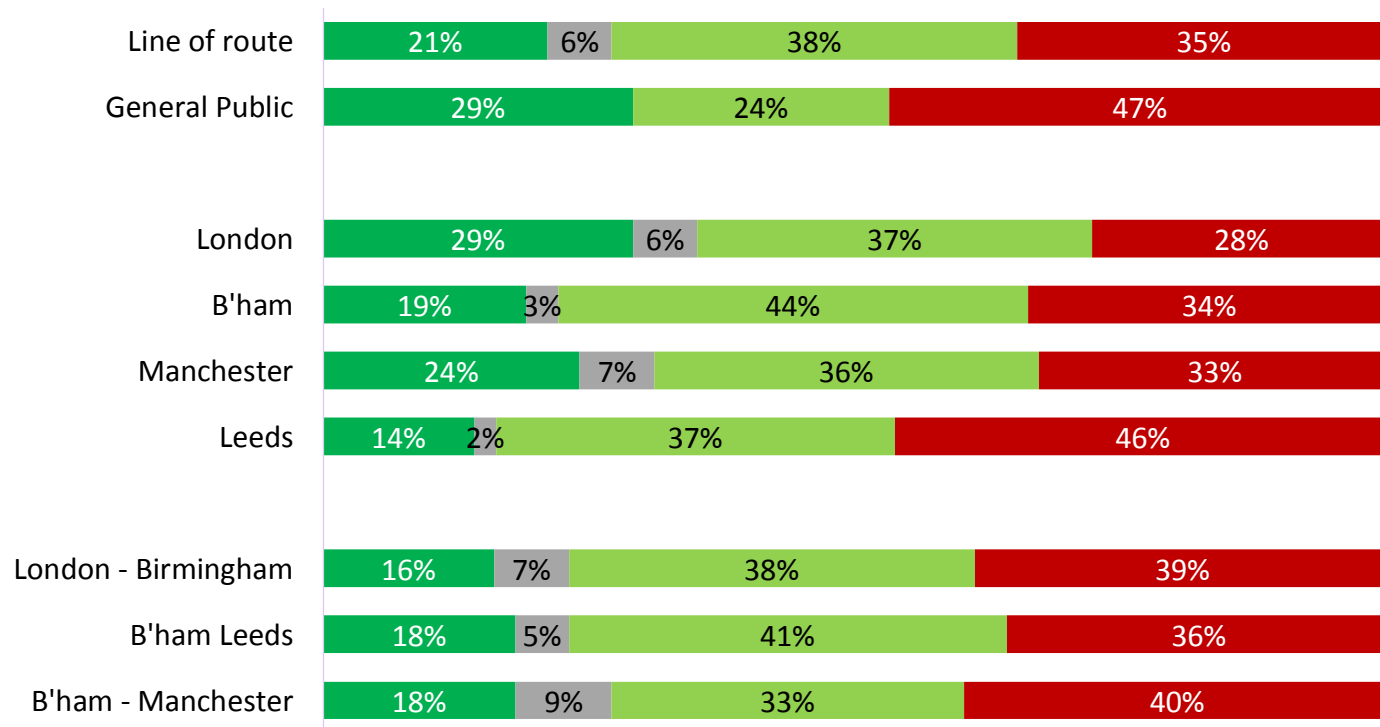
% of people who think HS2 will benefit...



## A third of line of route residents and almost half of the general public believe that the costs of HS2 will outweigh the benefits

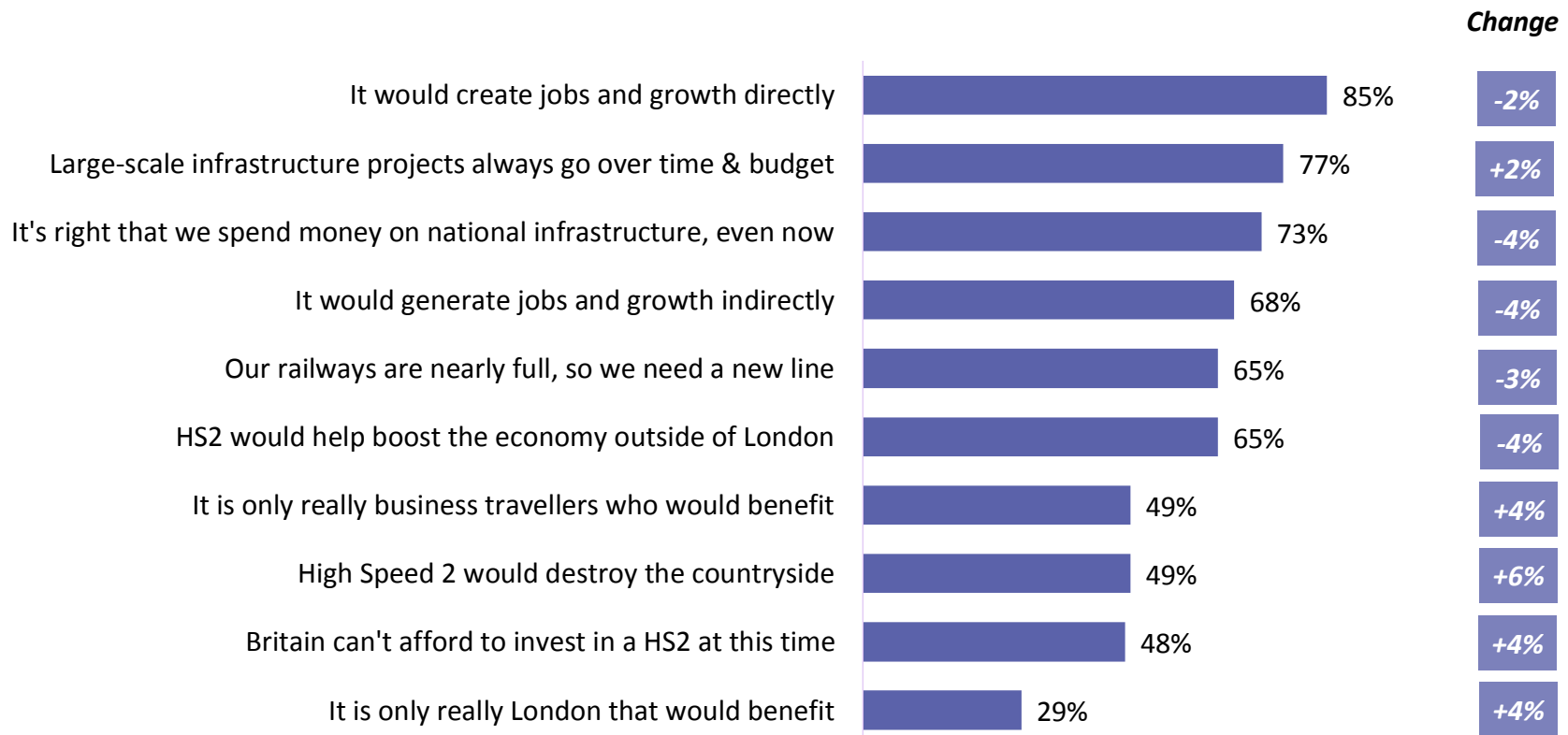
### Perceived costs and benefits

■ Benefits will be greater than costs
 ■ Don't know
 ■ Costs and benefits will be about the same
 ■ Costs be greater than benefits



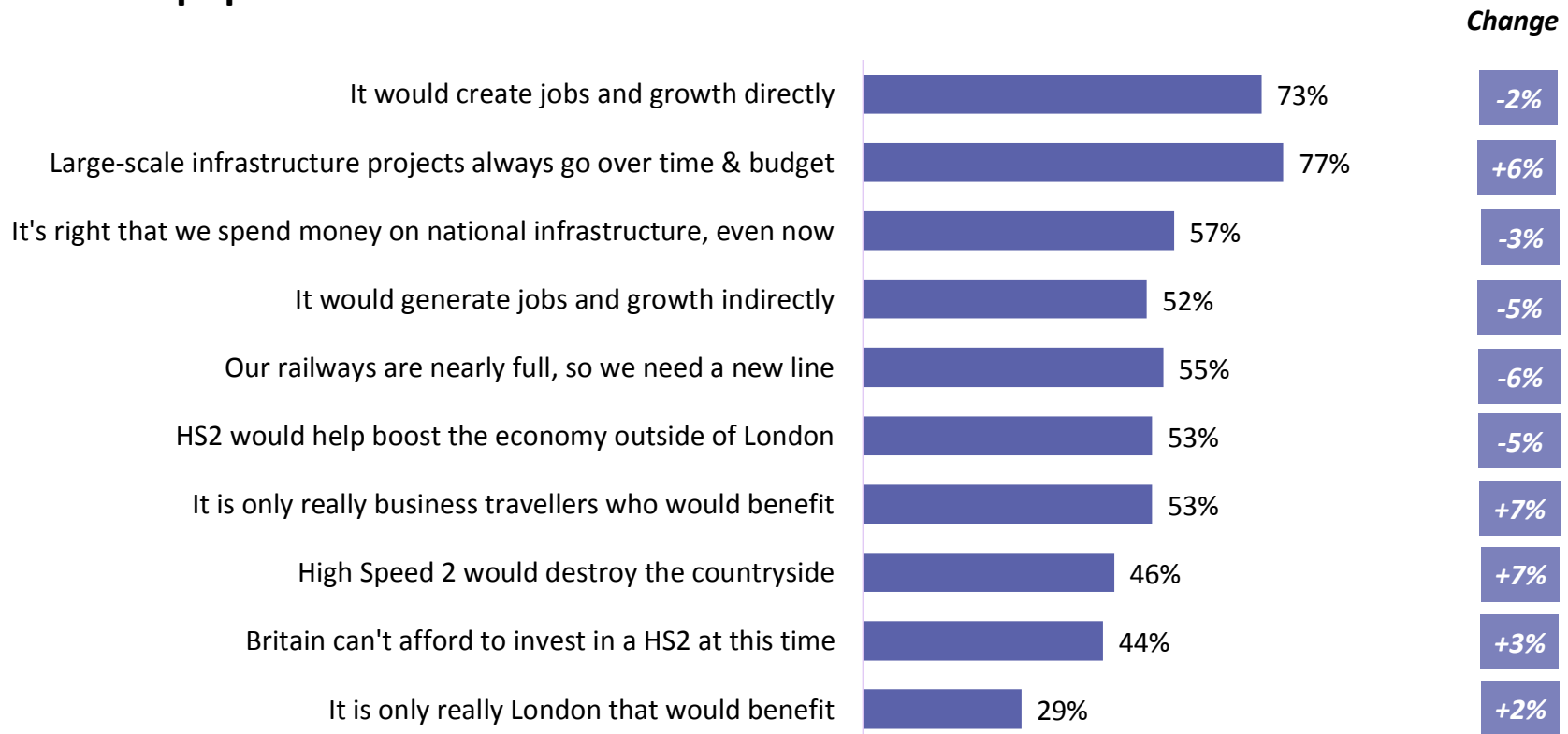
## There has been a small but consistent decrease in agreement with positive messages about HS2 & an increase in agreement with negative ones

### Agreement with arguments in favour and against HS2 on line of route



## There trend has been mirrored among the general public

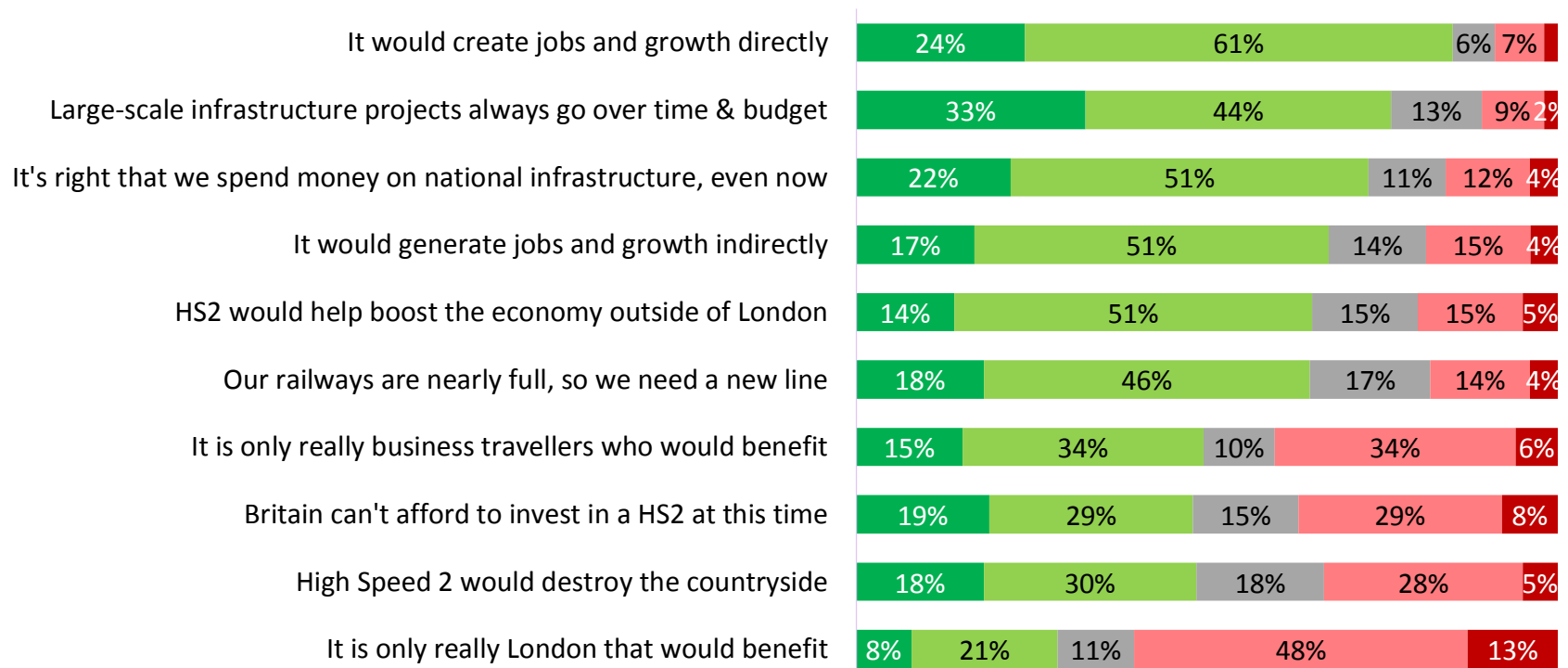
### Agreement with arguments in favour and against HS2 in the general population



## Three-quarters of line of route residents agree that it's right we spend money on infrastructure, even in the current economic climate

### Agreement with arguments in favour and against HS2

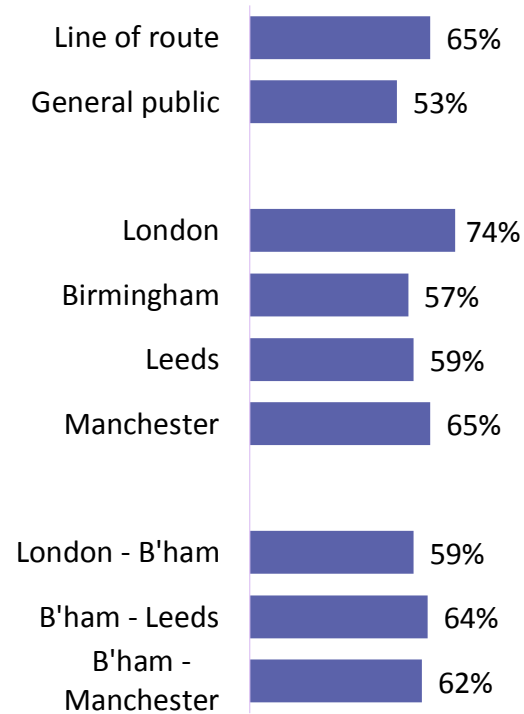
■ Strongly agree  
 ■ Agree  
 ■ Neither agree nor disagree  
 ■ Disagree  
 ■ Strongly disagree



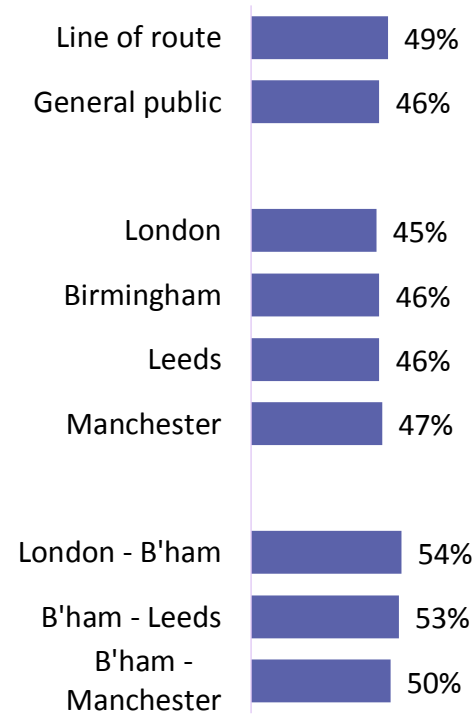
## Londoners are actually the most likely to agree that HS2 would help boost the economy outside of London

### % of people who agree that...

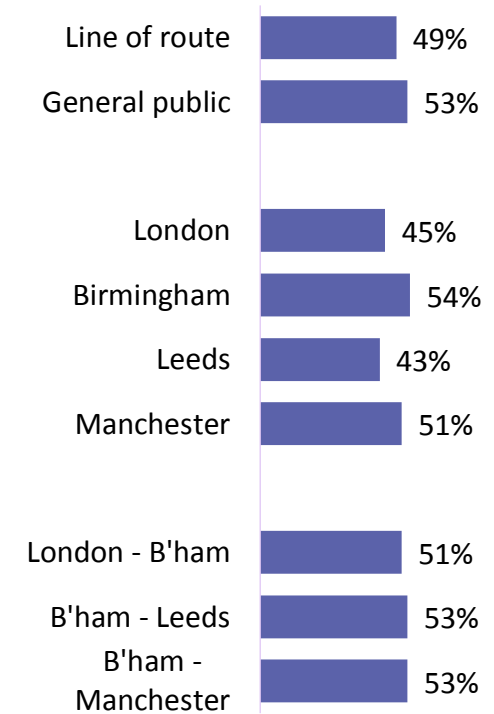
**HS2 would help boost the economy in cities and regions outside of London**



**HS2 would destroy the countryside**



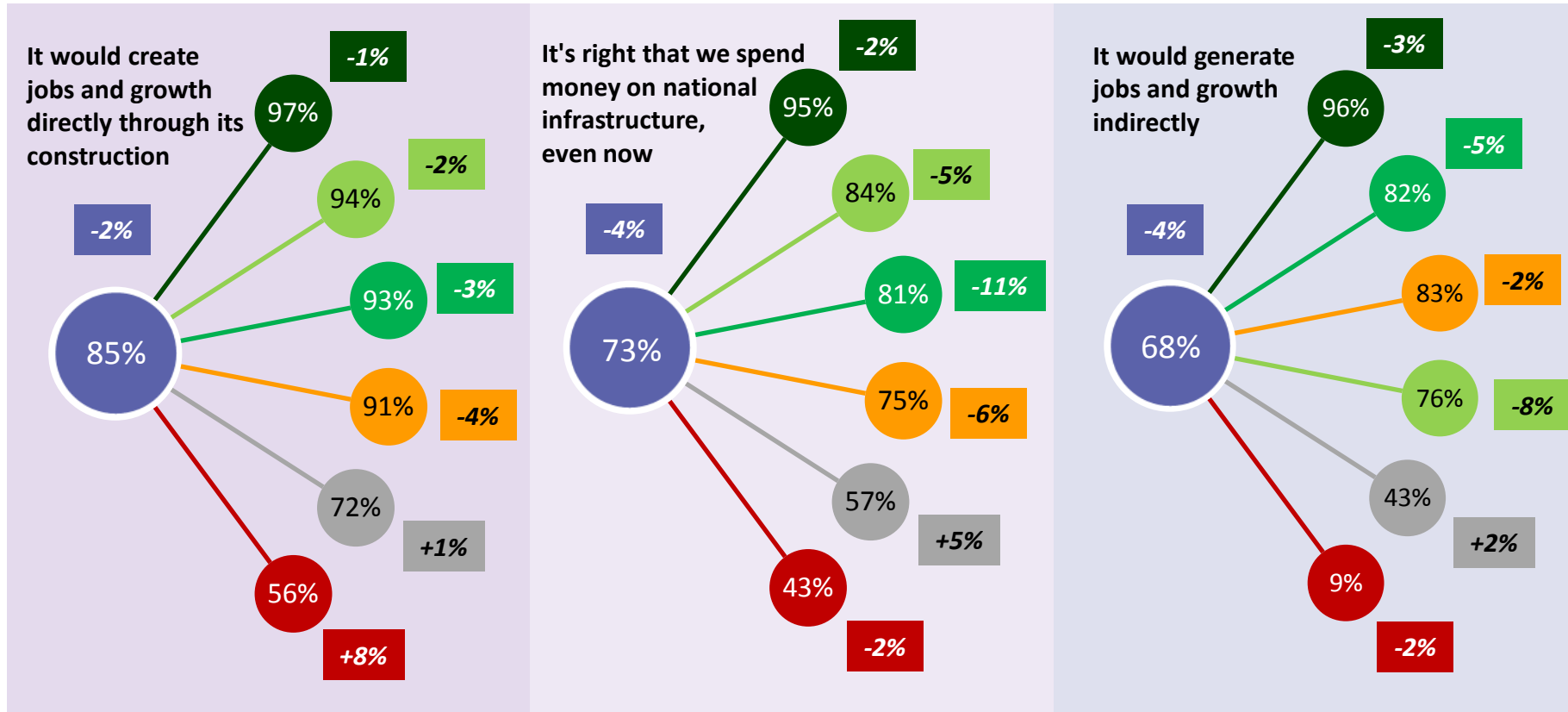
**It is only really business travellers who would benefit from HS2**



Base: Wave 2 Line of route (2,001) & General public (2,058)

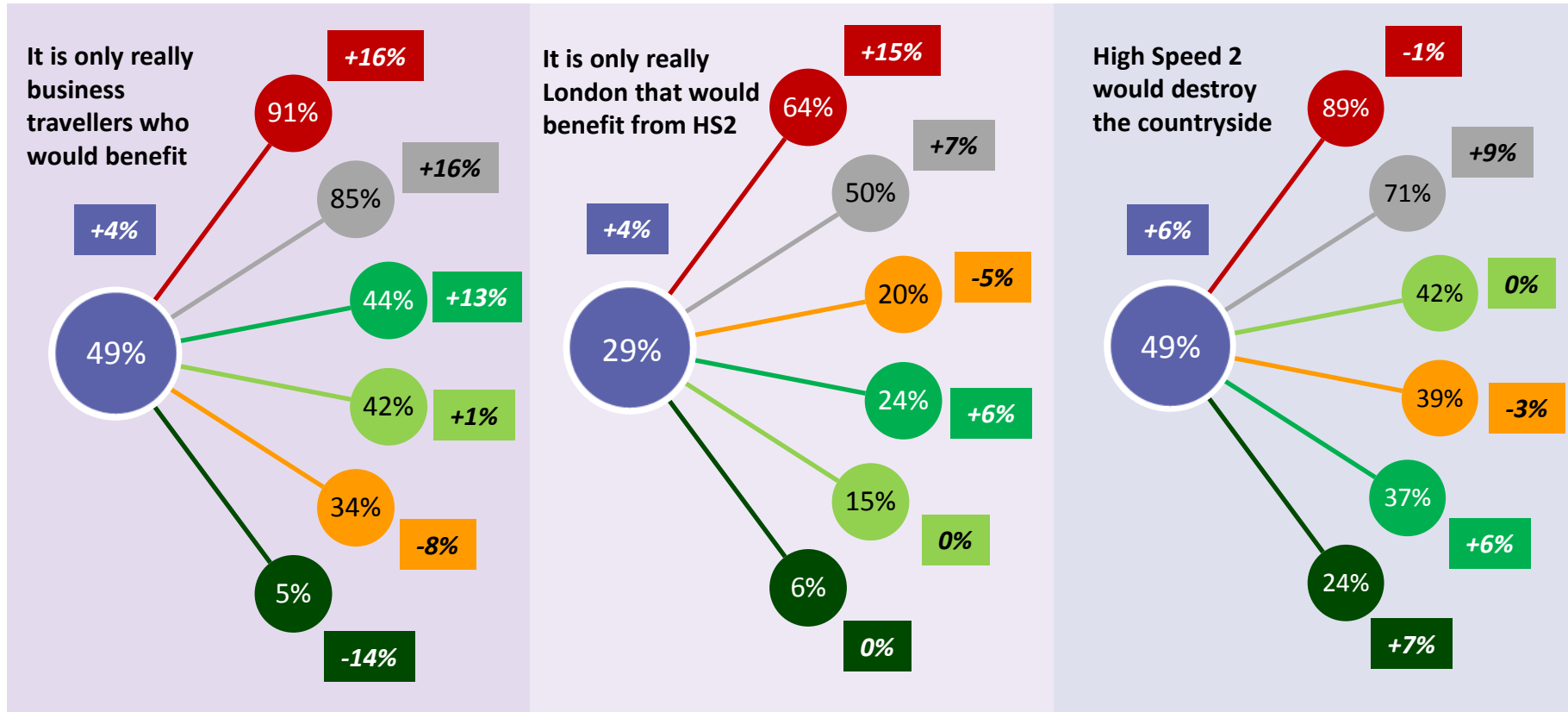
# There is strong agreement among most segments with the economic arguments in favour of HS2

% of people who agree that...



# However, there has been an increase in the number of people who believe HS2 will only benefit London and business travellers

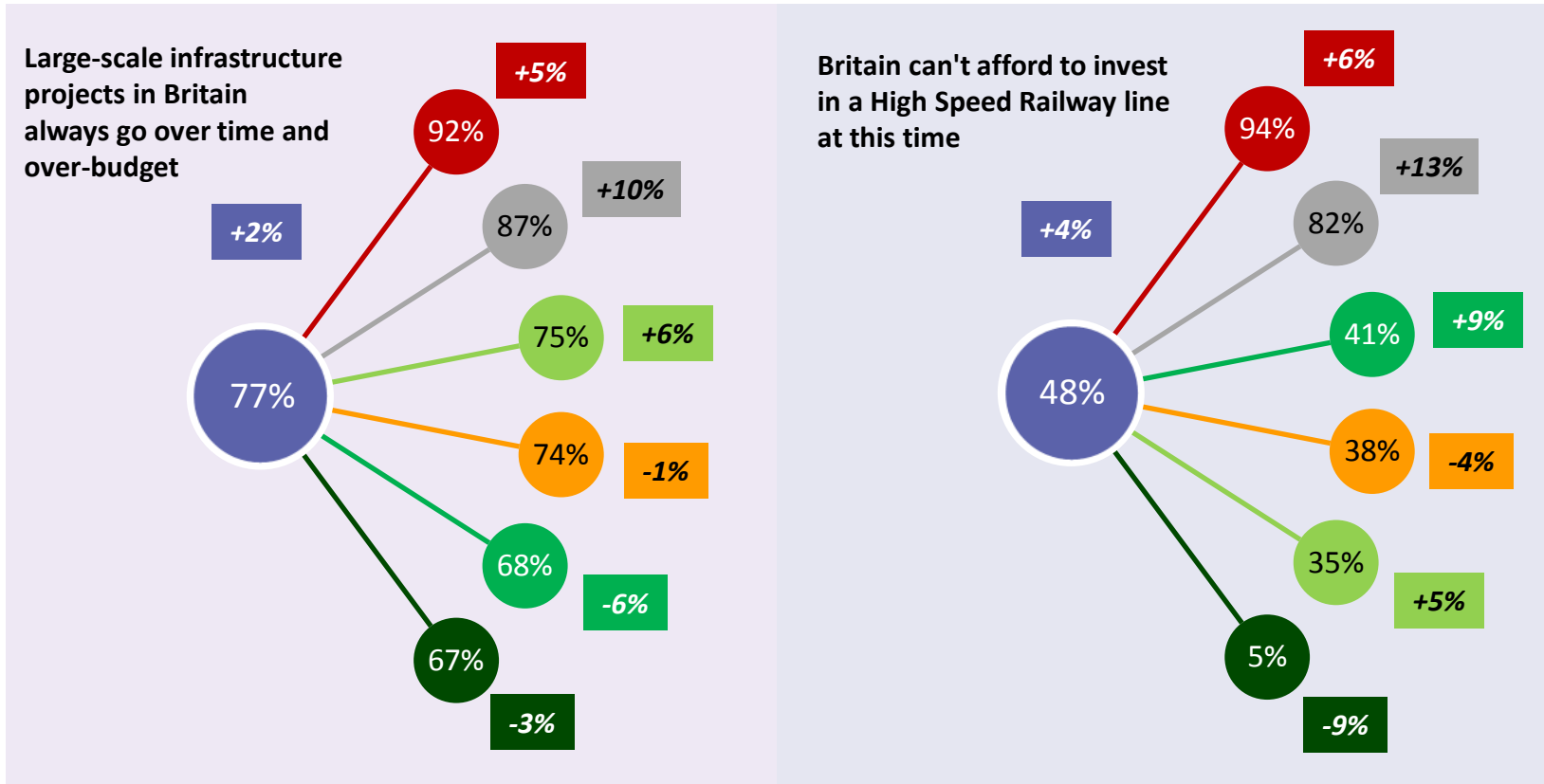
% of people who agree that...





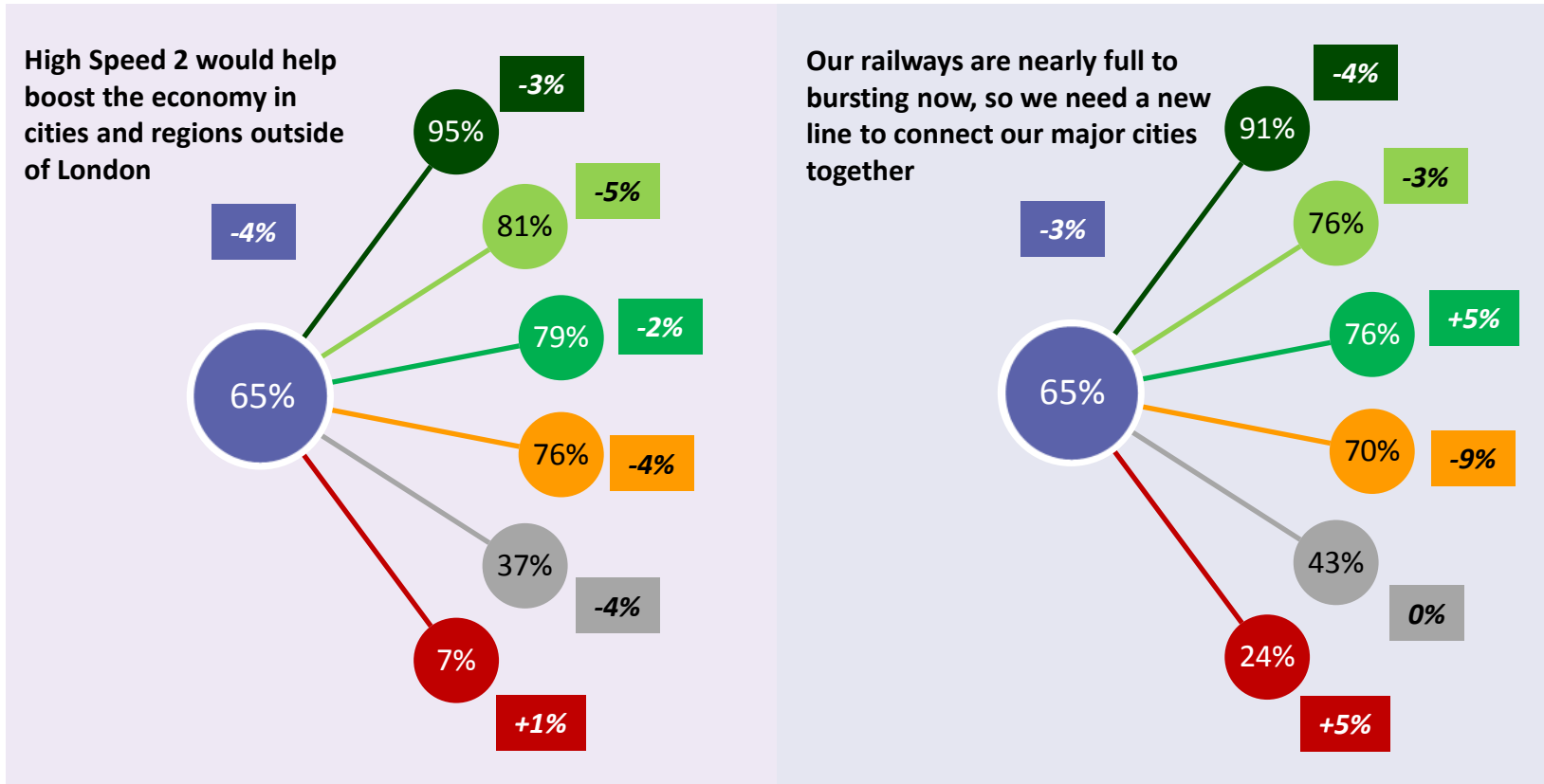
# Residents who are “in-play” have become more likely to think Britain can’t afford to invest in HS2 at the moment

% of people who agree that...



# But two-thirds of line of route residents – and a majority of four of the six segments – agree the country needs the capacity

% of people who agree that...



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