

High Speed 2 Polling Line of Route and General Public January 2013



Methodology & overview

Line of route survey

- 2,000 interviews conducted by telephone between 11th and 20th January 2013
- Drawn 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 & the sample has been weighted to be demographically representative

General public survey

- 2,013 interviews conducted online between 18th and 20th January 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 six 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 & 8: agreement with a mix of positive and negative statements and arguments 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).



Residents along the line of route split into six distinct segments based on their views towards HS2

Segment proportions

Shorthand Segment Titles

Support already

18%, 3,742,000 adults

Inclined to support

12%, 2,495,000 adults

Broadly supportive

12%, 2,495,000 adults

Disengaged

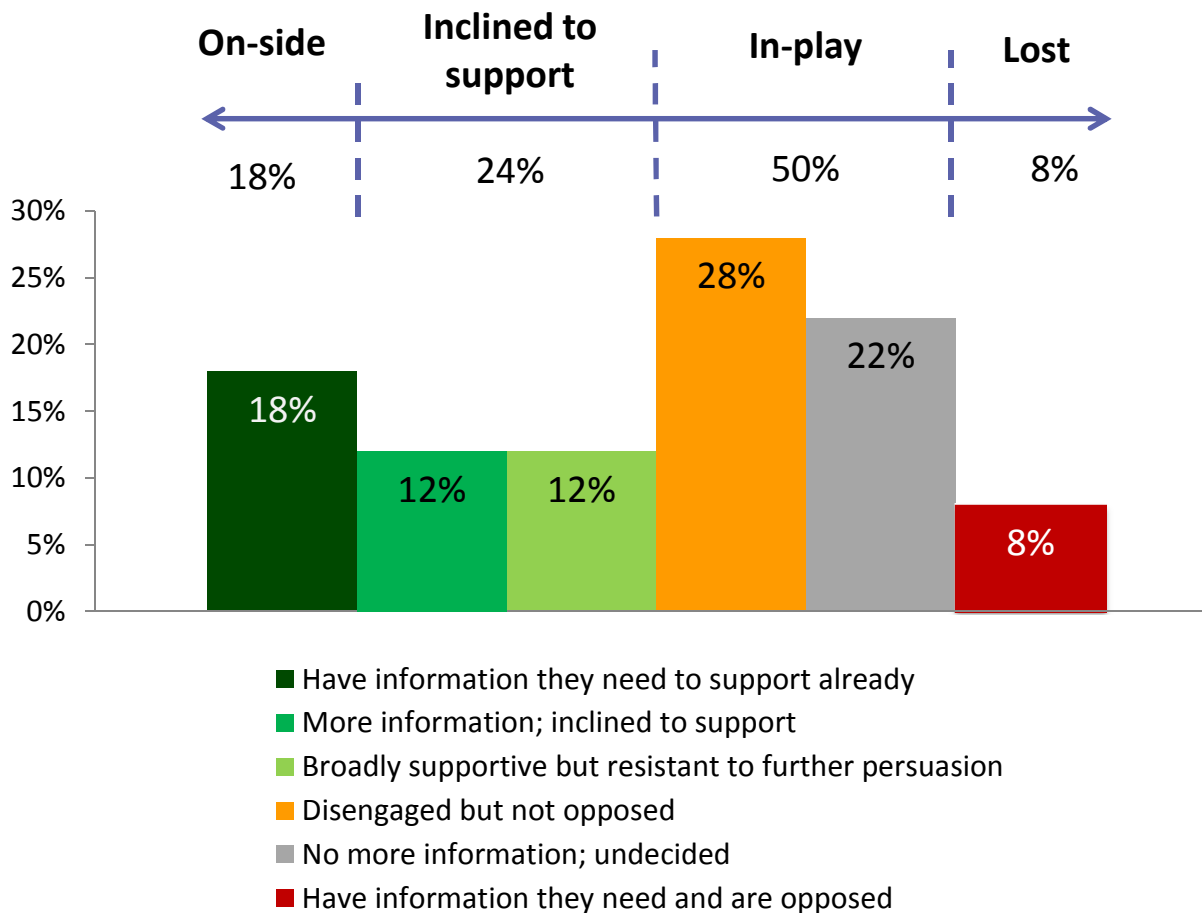
28%, 5,822,000 adults

Undecided

22%, 4,574,000 adults

Opposed

8%, 1,663,000 adults



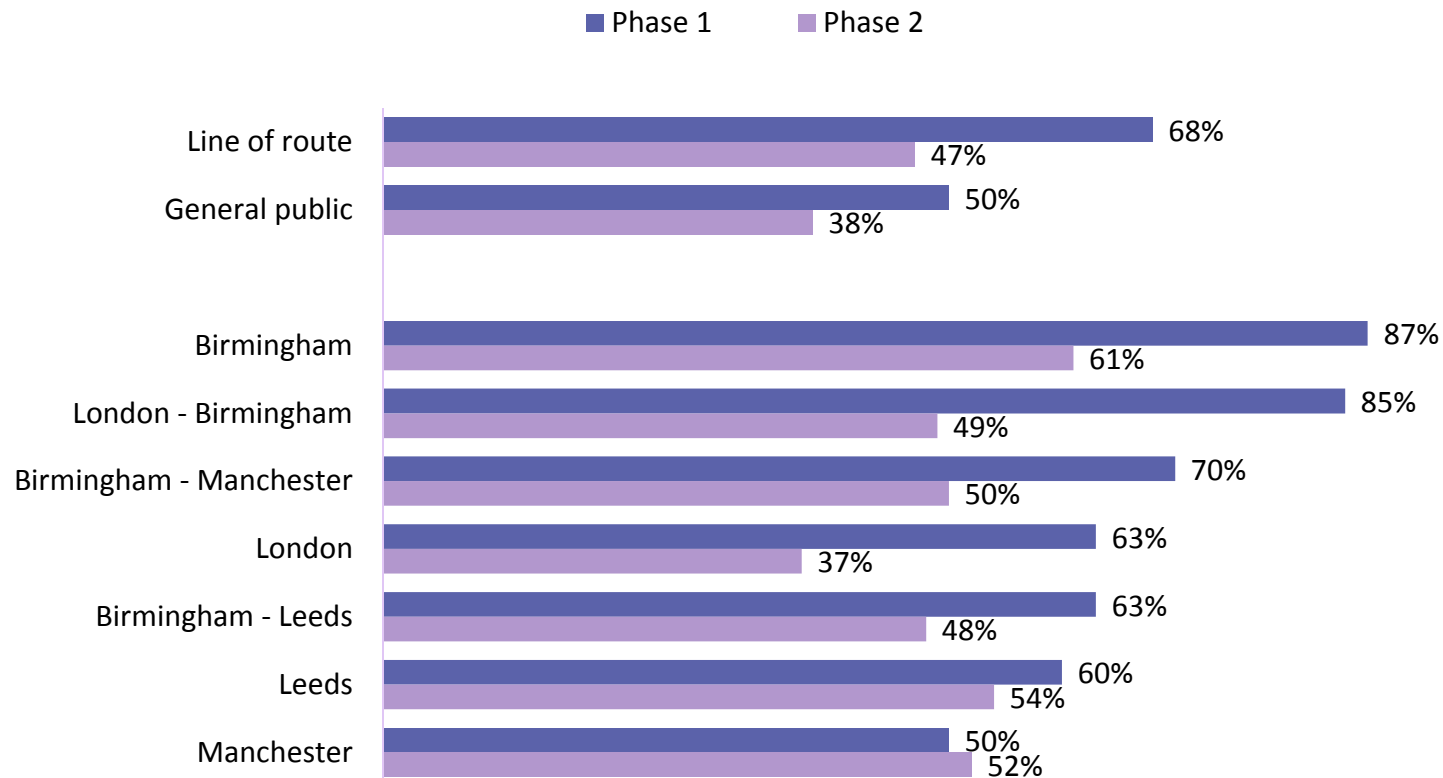
p4

Base: Line of route (2,000), broken down into: Support already (366), Inclined to support (207), Broadly supportive (282), Disengaged (492), Undecided (459) & Opposed (194).

Population figures based on an estimate of 20,791,579 local adult residents who live within 10 miles of the proposed line of route.

Residents in almost all of the locations along the route are much more aware of Phase 1

% of people who are aware of HS2 phases 1 and 2



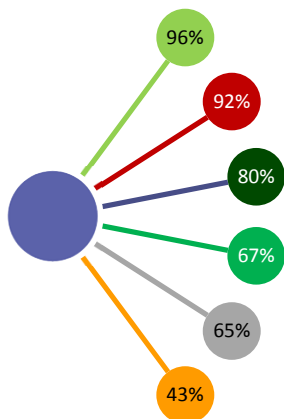
p5

Base: Line of route (2,000) & General public (2,013)

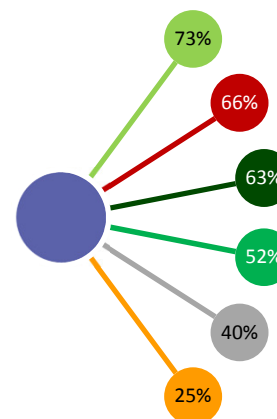
Segments that are 'in-play' are among the least likely to know about either phase of HS2

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

Phase 1

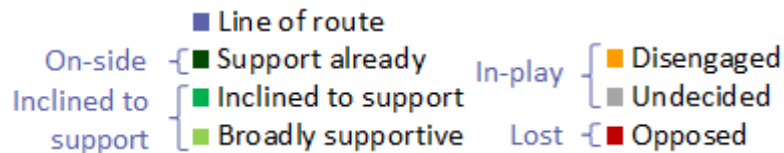


Phase 2



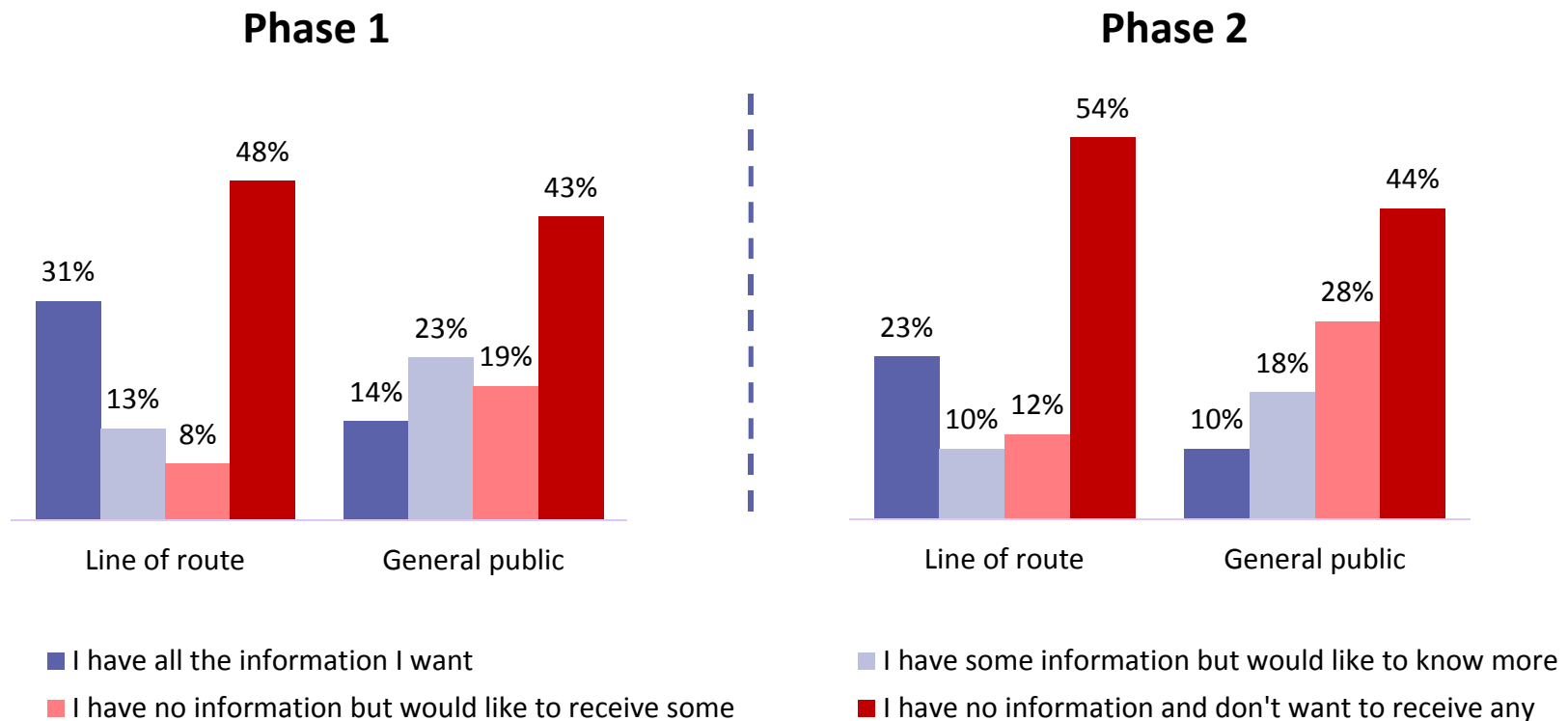
p6

Base: Line of route (2,000)



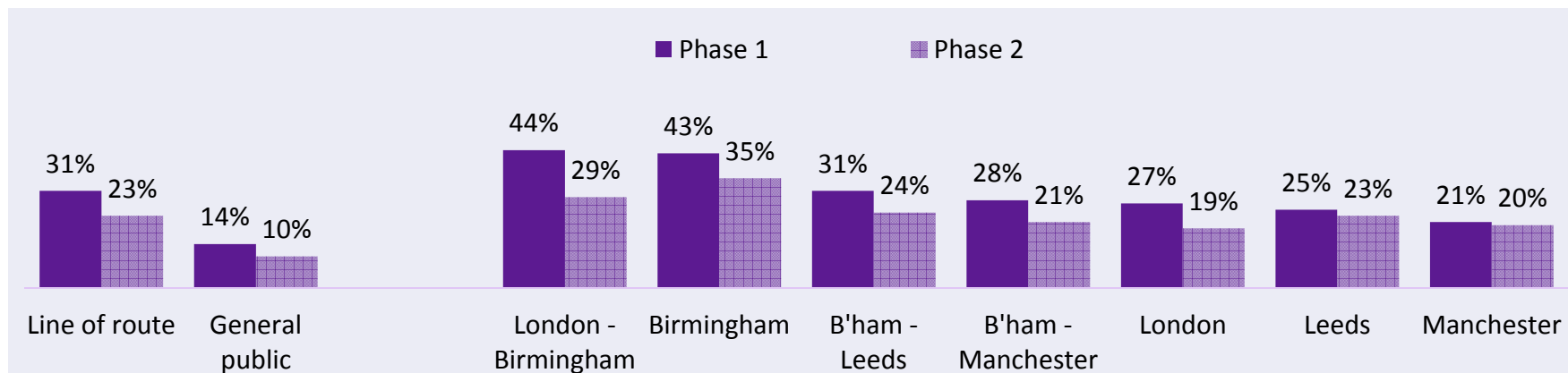
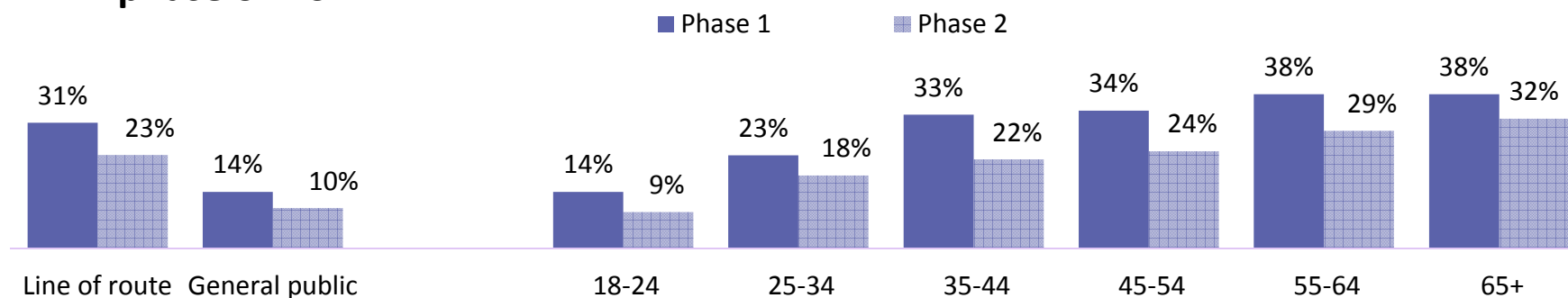
Roughly half of residents along the line of route say they have received no information about HS2 and do not want to receive any

How well informed people feel about phases 1 & 2 and how much information they would like to receive about them



Older residents and those who live in Birmingham or on the London-Birmingham route are the most likely to say they have all the information they want

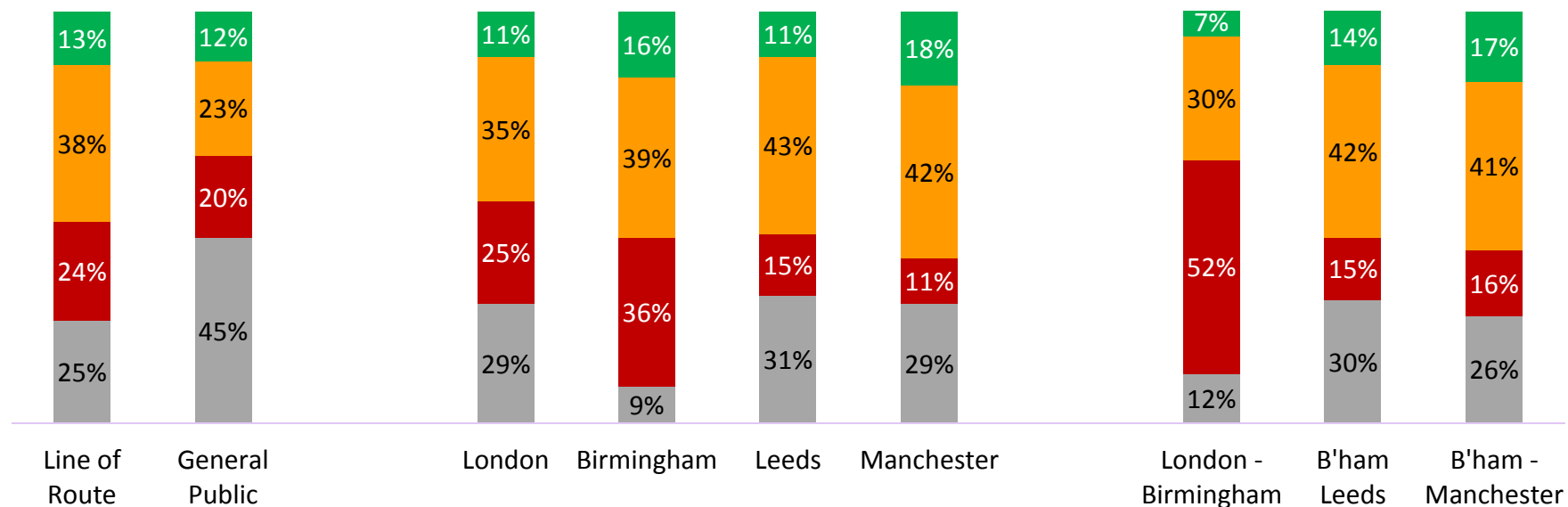
% of people who say they have all the information they want about each phase of HS2



Residents on the London – Birmingham route are much more likely to recall more negative stories than positive ones

What type of publicity people can recall most about HS2

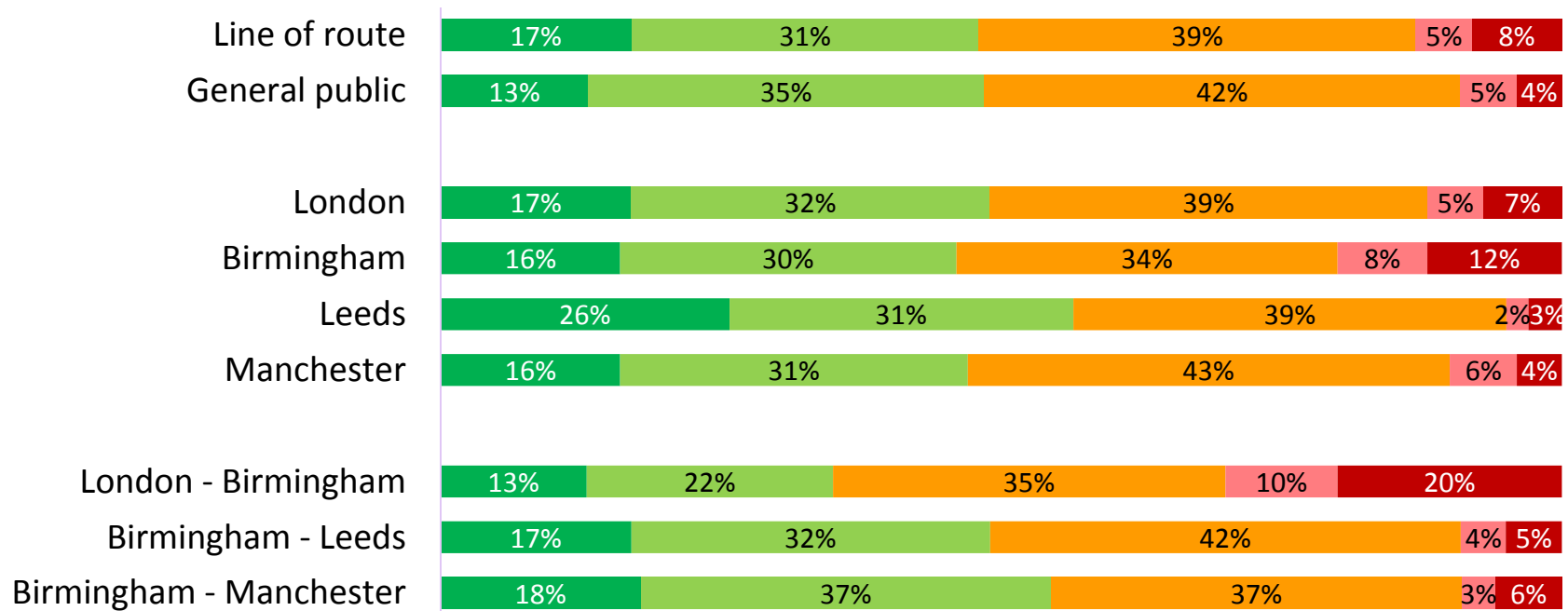
- Seen/ heard more positive things than negative
- Seen/ heard about the same amount of positive and negative things
- Seen/ heard more negative things than positive
- Have not seen/ heard any publicity about HS2



Almost half of the general public and residents along the line of route support HS2

Opinion of HS2

■ Strongly in favour
 ■ In favour
 ■ Undecided
 ■ Against it
 ■ Strongly against it



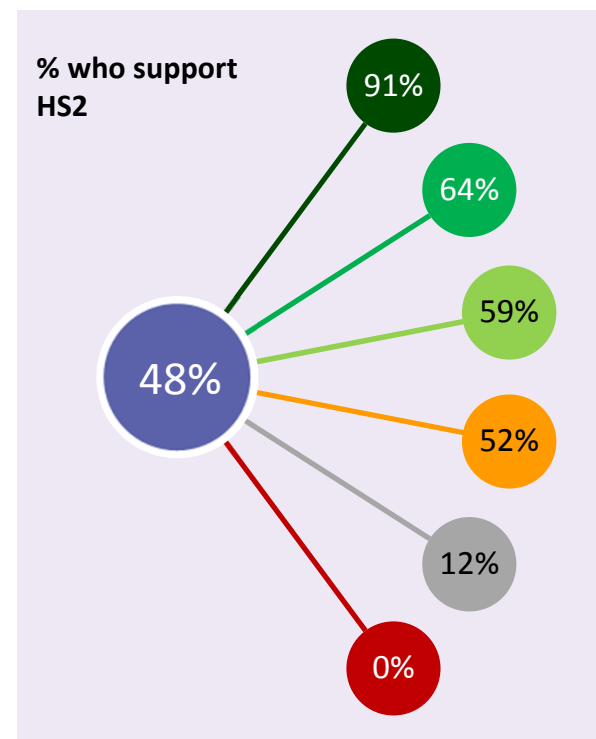
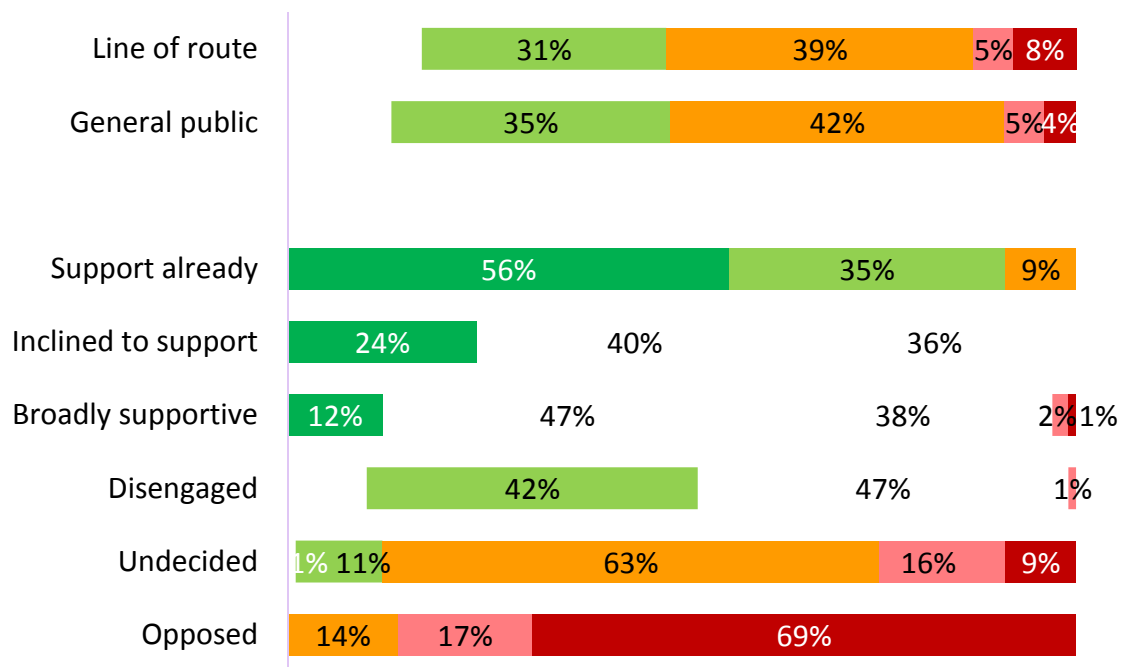
p10

Base: Line of route (2,000) & General public (2,013)

A majority of 4 out of 6 segments favour HS2 but their strength of support varies considerably

Opinion of HS2

■ Strongly in favour
 ■ In favour
 ■ Undecided
 ■ Against it
 ■ Strongly against it



p11

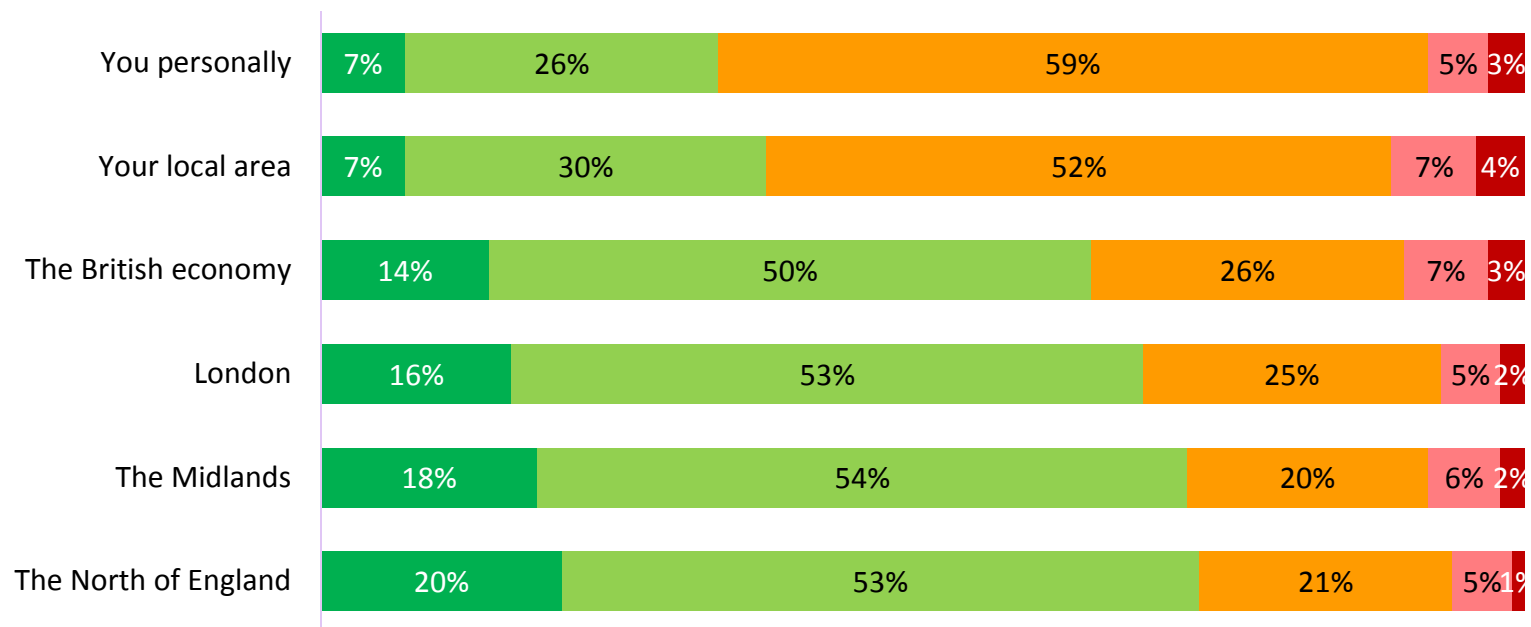
Base: Line of route (2,000) & General public (2,013)

■ Line of route
■ Support already
■ Inclined to support
■ Broadly supportive
■ Disengaged
■ Undecided
■ Opposed

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

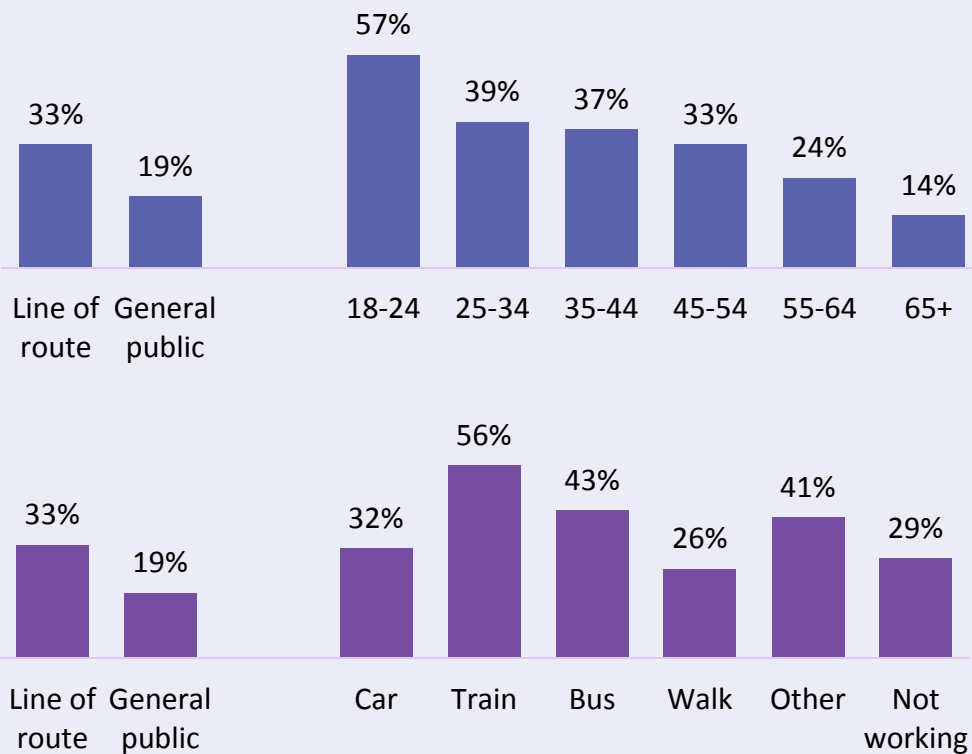
Perceived impact of HS2 on...

■ Very positive difference
 ■ Positive difference
 ■ No difference
 ■ Negative difference
 ■ Very negative difference

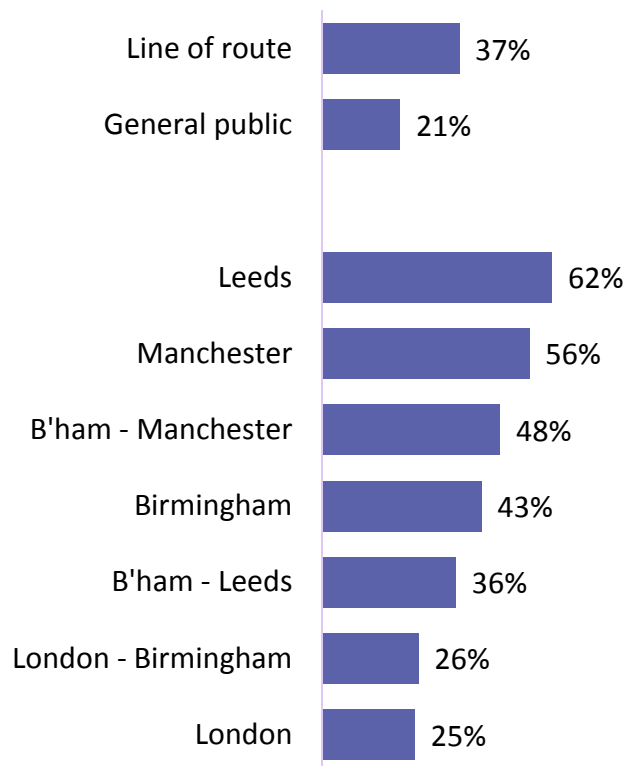


Younger people and those who primarily use trains to travel to work are much more likely to feel HS2 will benefit them personally

% of people think HS2 will benefit *them personally*



% of people think HS2 will benefit *their local area*

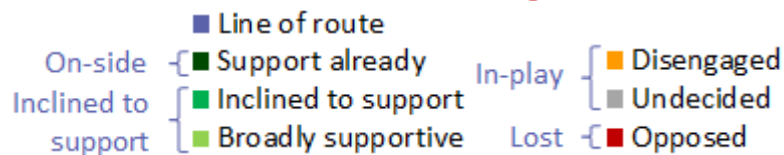


Most segments feel that even if the service will not benefit them personally, it will benefit the regions and British economy

% of people who think HS2 will benefit...

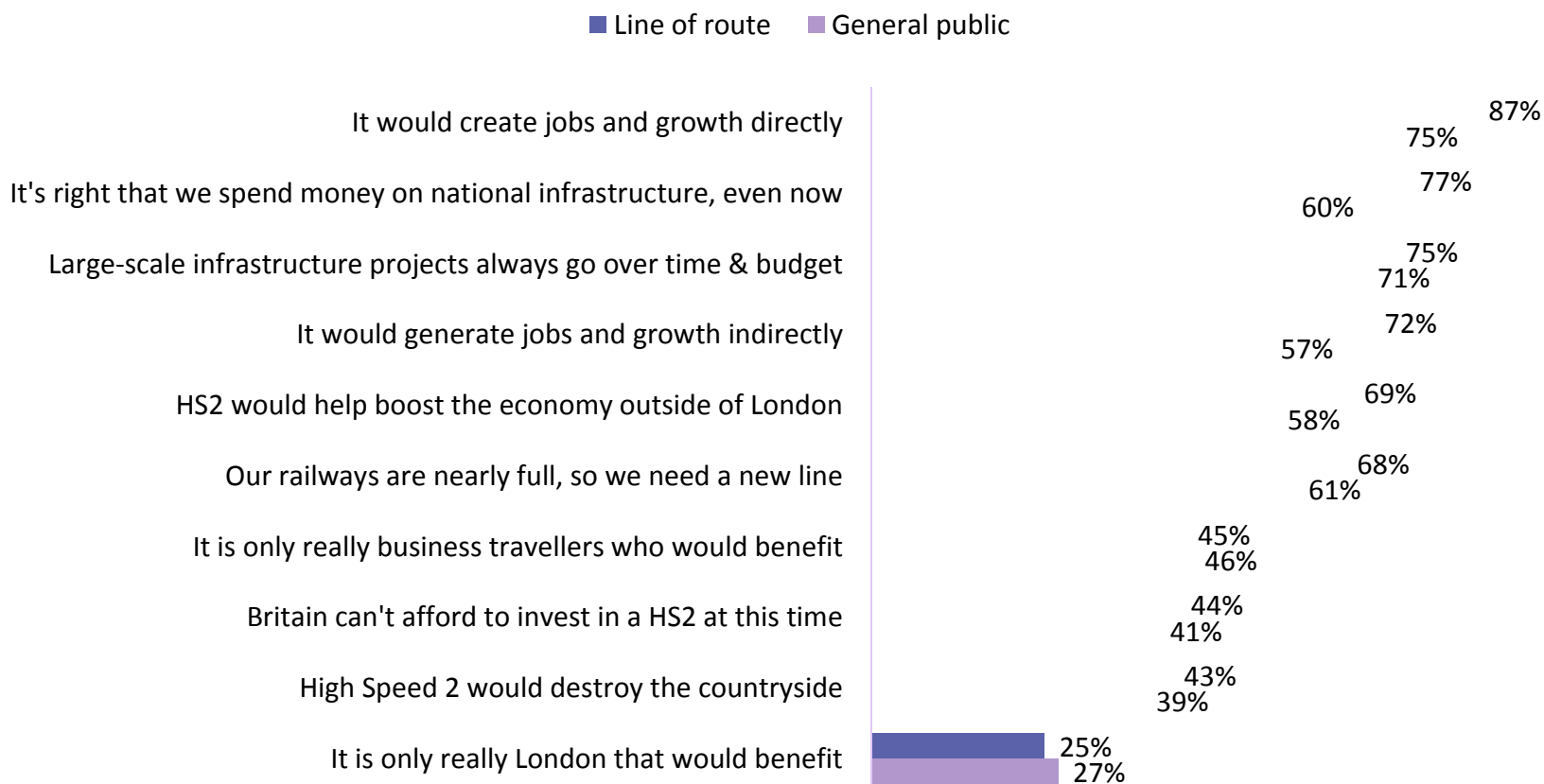


p14 Base: Line of route (2,000)



A large majority of the general public and residents along the line of route already agree with arguments in favour of HS2

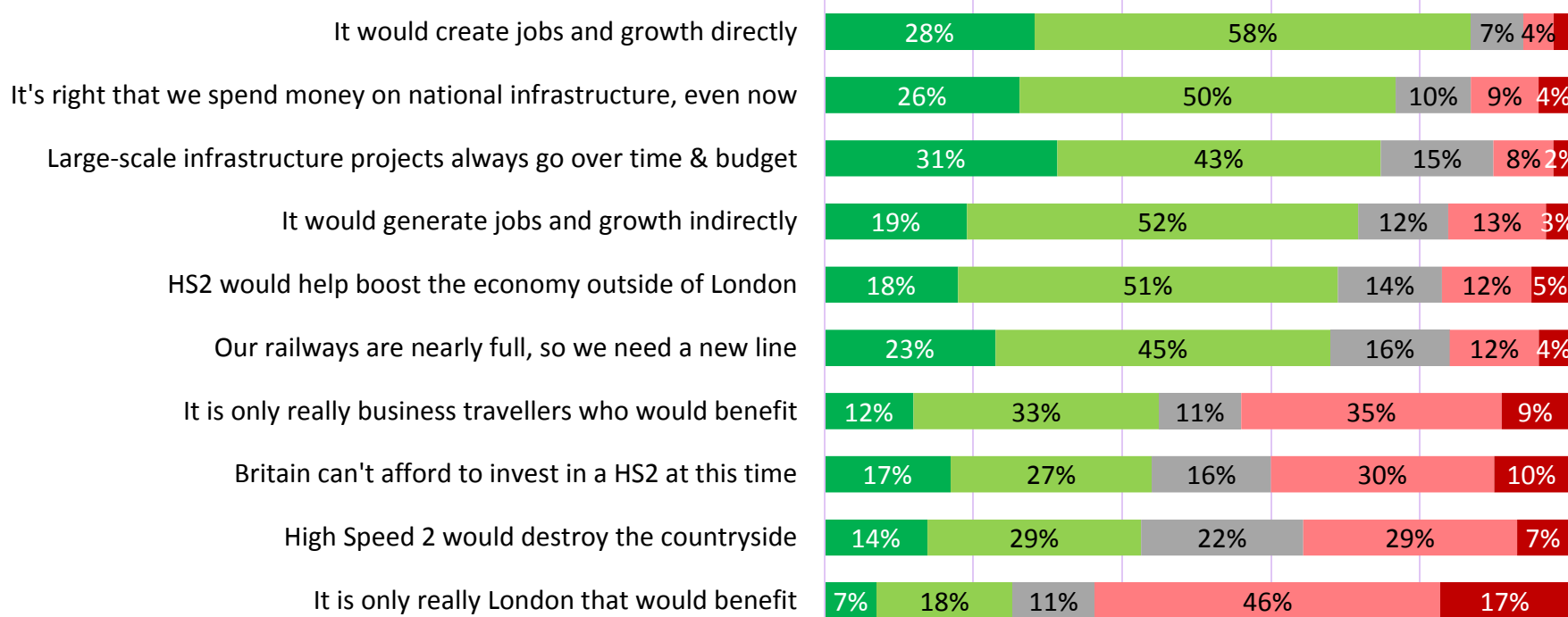
Agreement with arguments in favour and against HS2



Residents along the line of route are particularly likely to believe that HS2 would have a positive impact on jobs and growth

Agreement with arguments in favour and against HS2

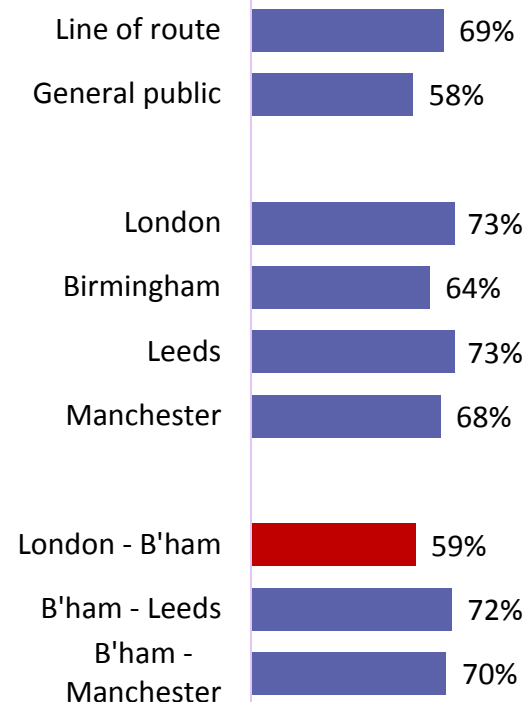
■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree



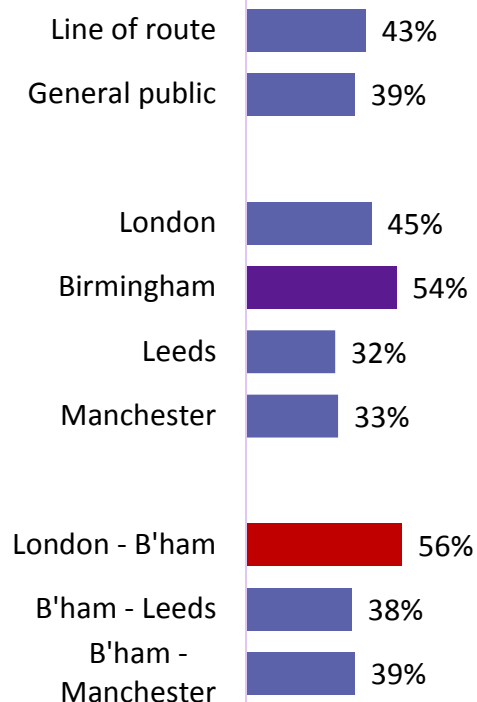
Residents in Birmingham and on the London-Birmingham route are noticeably more negative about many aspects of HS2

% of people who agree that...

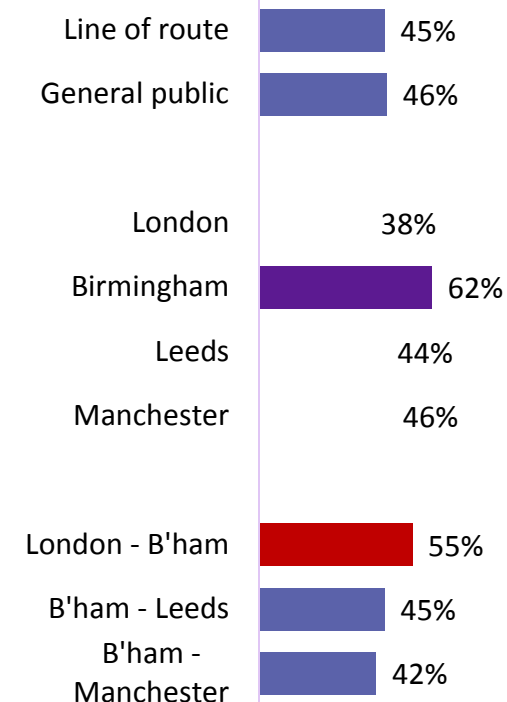
HS2 would help boost the economy in cities and regions outside of London



HS2 would destroy the countryside

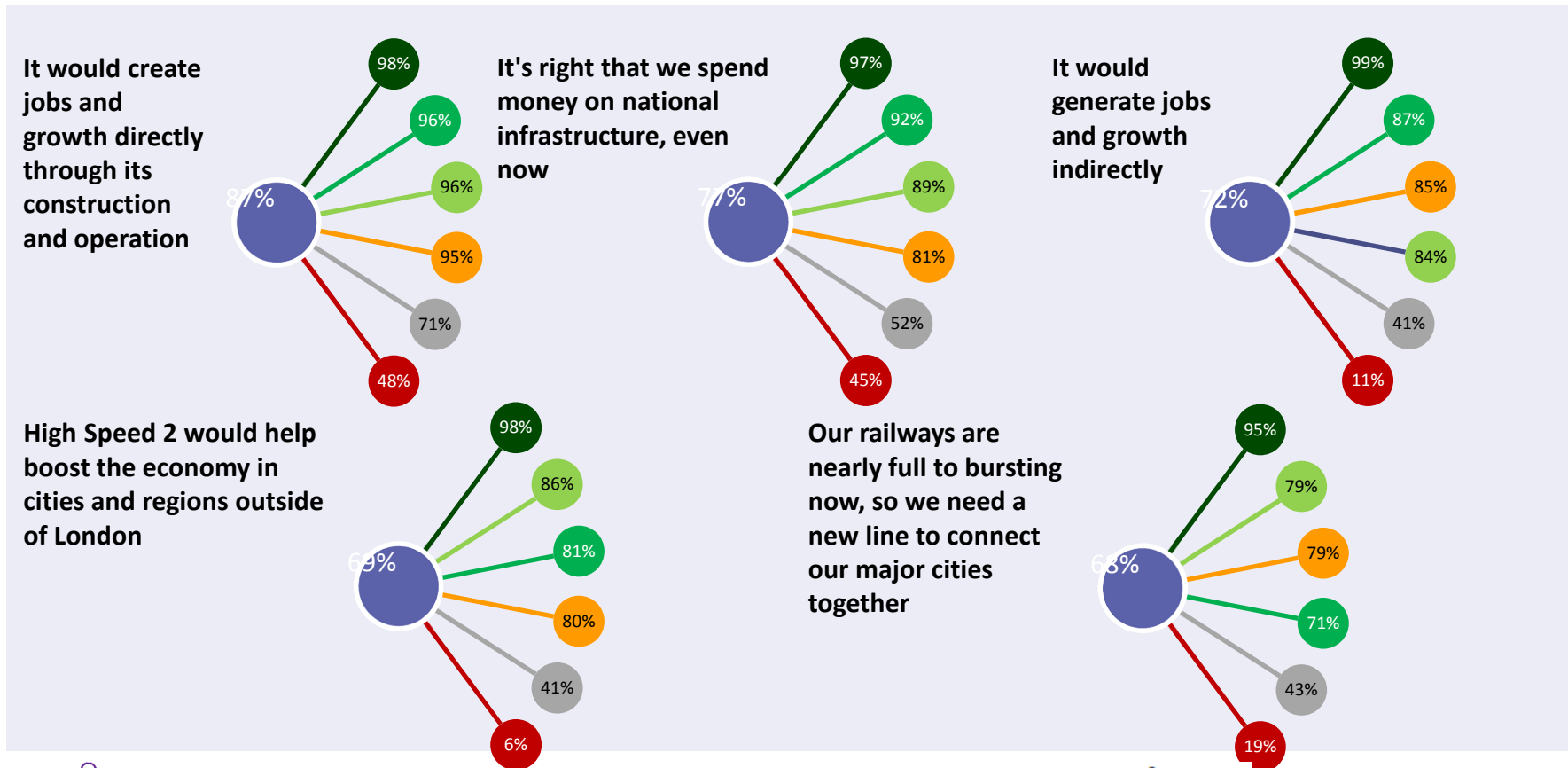


It is only really business travellers who would benefit from HS2



Many opponents agree that HS2 will generate jobs directly but they disagree it will have positive knock-on effects

% of people who agree that...



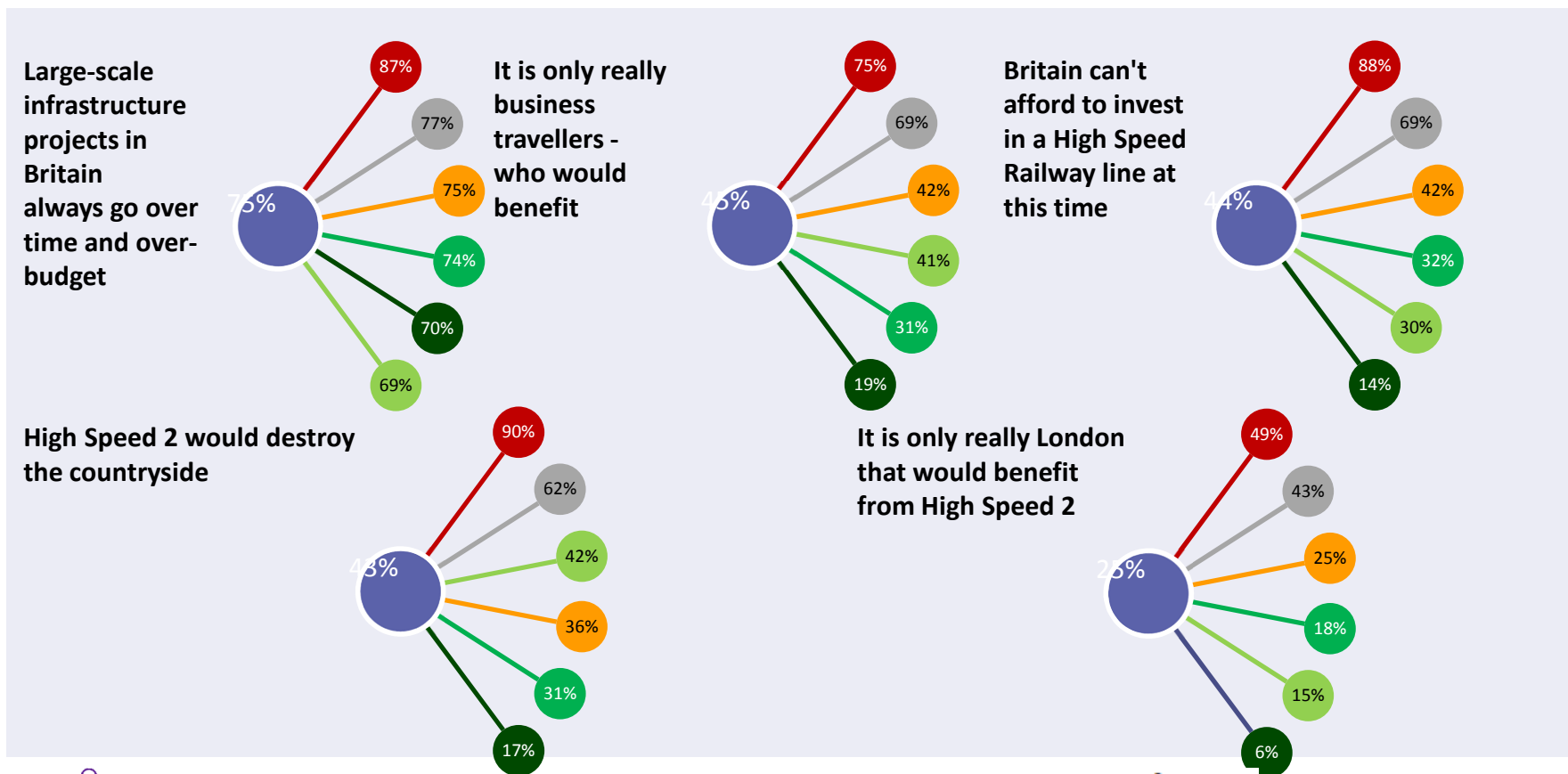
p18

Base: Line of route (2,000)

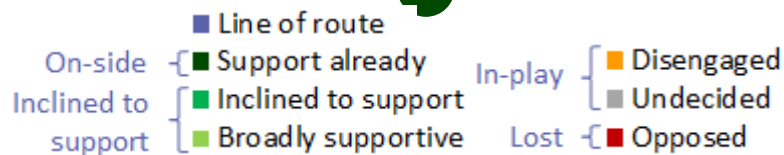
■ Line of route
■ On-side
■ Inclined to support
■ Broadly supportive
■ Disengaged
■ Undecided
■ Opposed

All segments agree large infrastructure projects go over time and budget – but most support HS2 nonetheless

% of people who agree that...

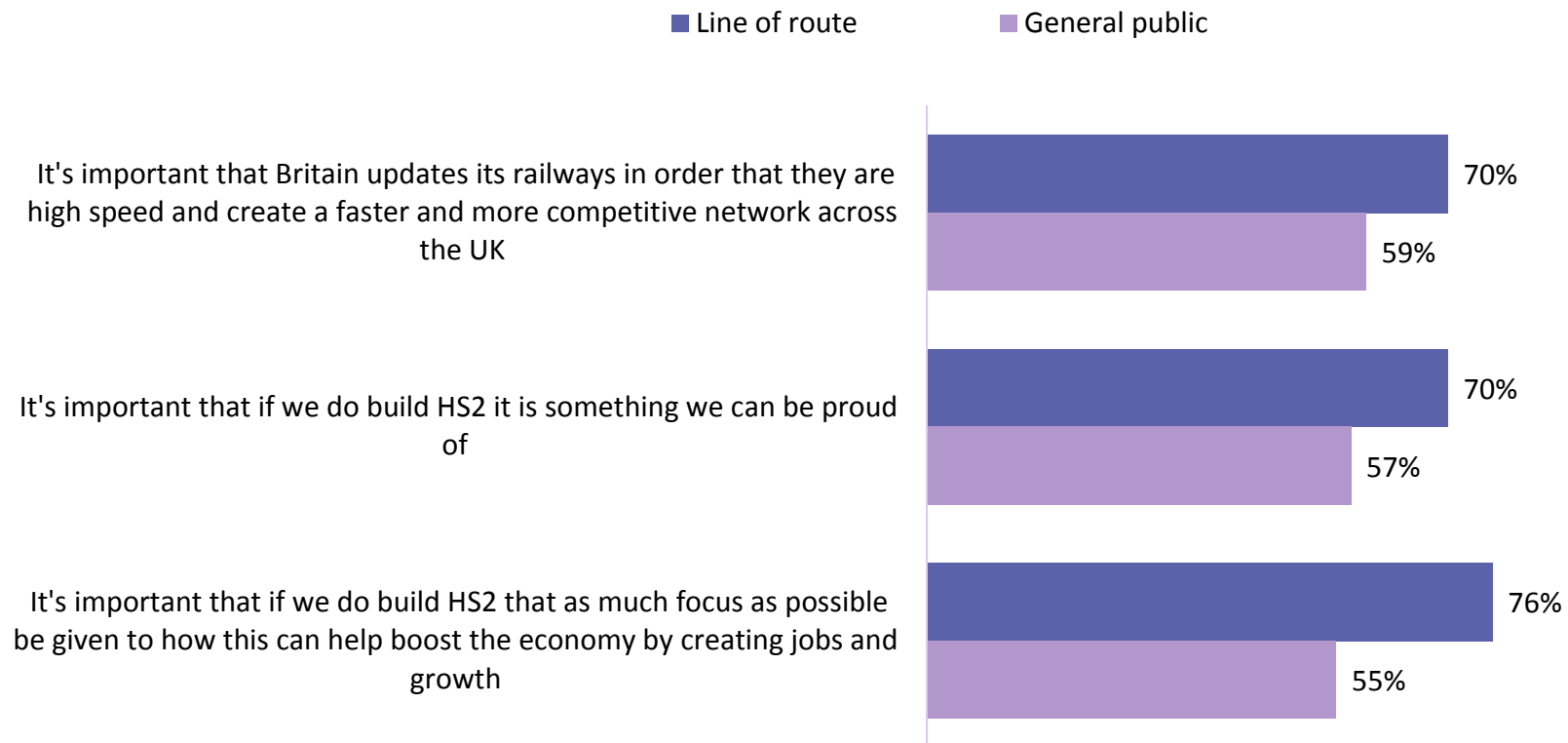


p19 Base: Line of route (2,000) & General public (2,013)



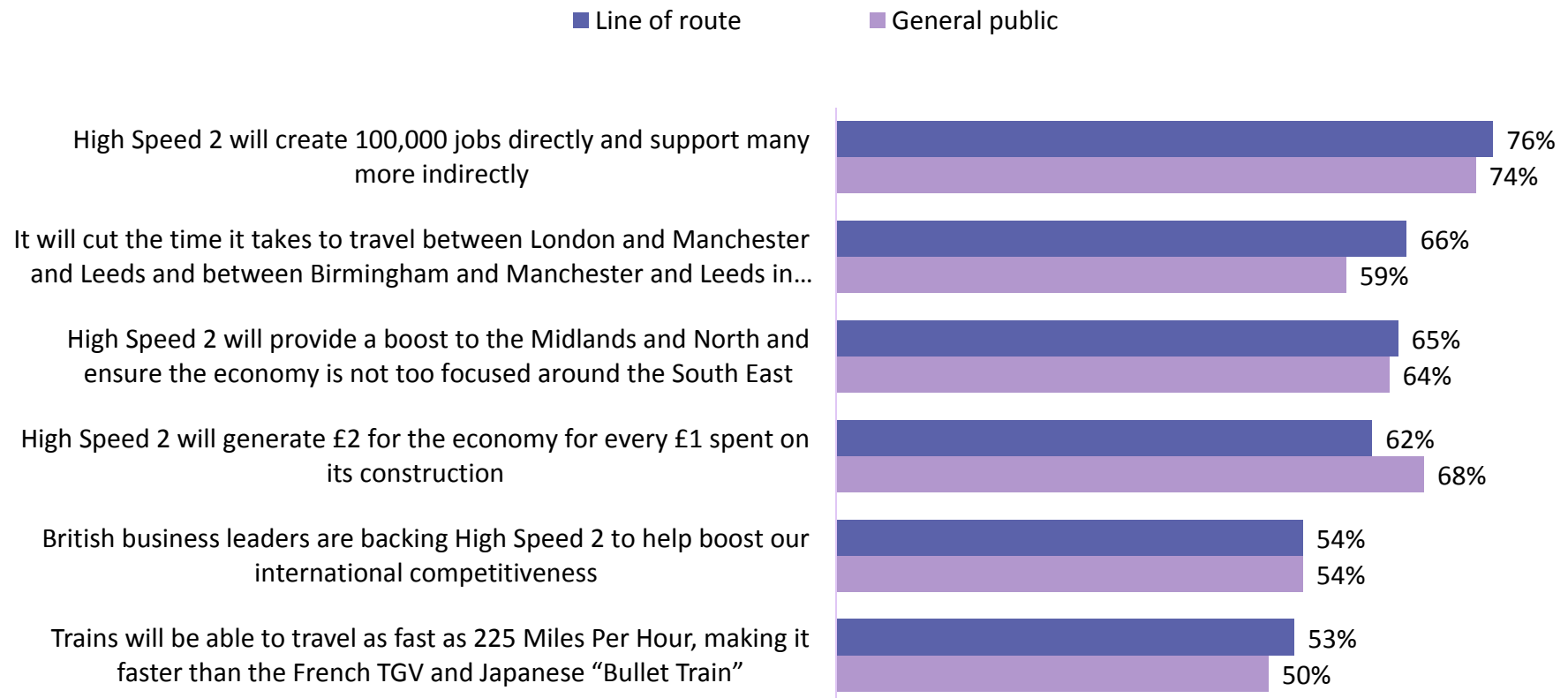
A majority of the general public and residents along the line of route support the vision and believe it is achievable

% of people agreeing with each statement and who believe that HS2 would be able to achieve it



Line of route residents find arguments about travel times more convincing, while the general public puts more weight on the wider economic benefits

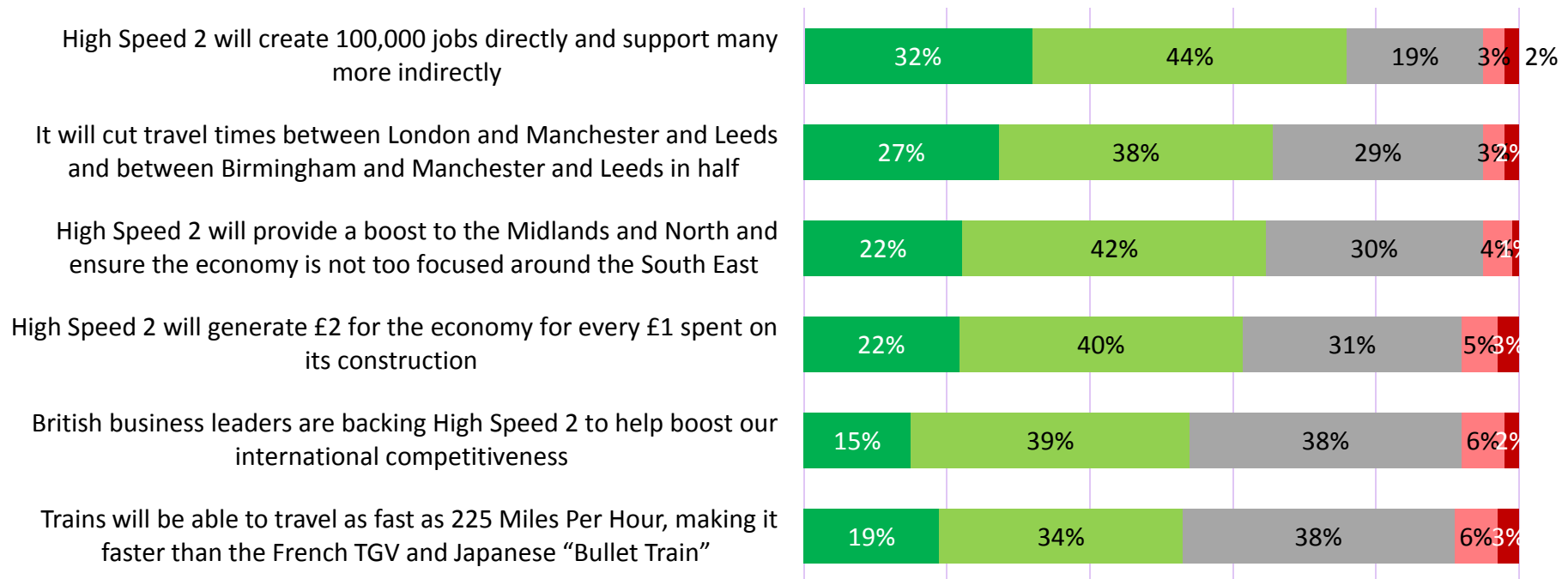
% who would be more likely to support HS2 as a result of each argument



A clear majority of people along the line of route are receptive to arguments in favour of HS2, especially regarding jobs and travel times

Extent to which each argument will influence people's opinion of HS2

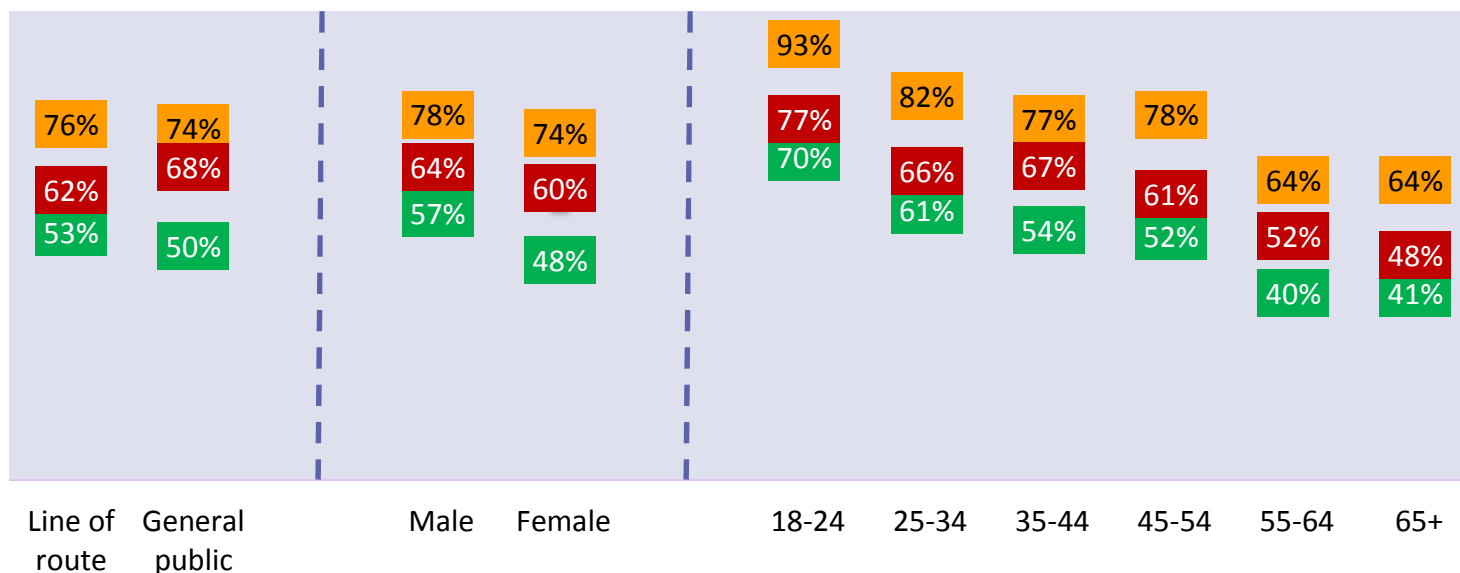
■ Much more likely to support
 ■ More likely to support
 ■ No difference
 ■ Less likely to support
 ■ Much less likely to support



Younger people on the line of route are particularly likely to be receptive to some arguments in favour of HS2

% who would be more likely to support HS2 as a result of each argument

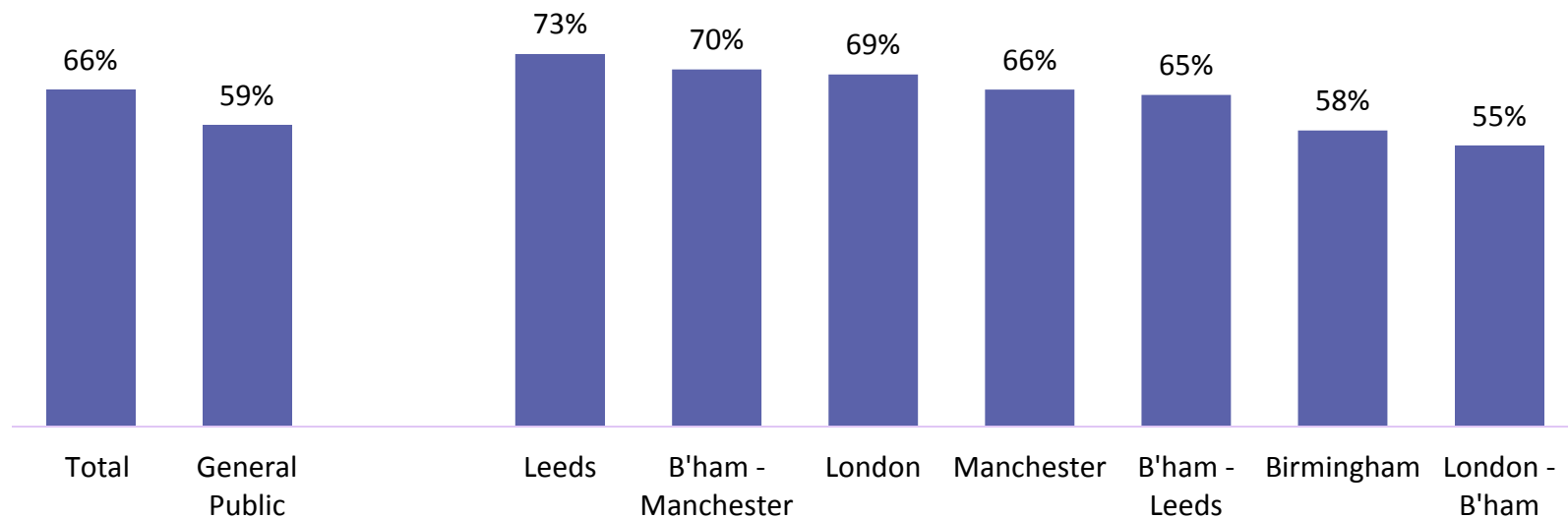
- Trains will be able to travel as fast as 225 Miles Per Hour, making it faster than the French TGV and Japanese “Bullet Train”
- High Speed 2 will create 100,000 jobs directly and support many more indirectly
- High Speed 2 will generate £2 for the economy for every £1 spent on its construction



Location on the route does not significantly affect reactions to most arguments, but it strongly influences responses to the message about reduced journey times

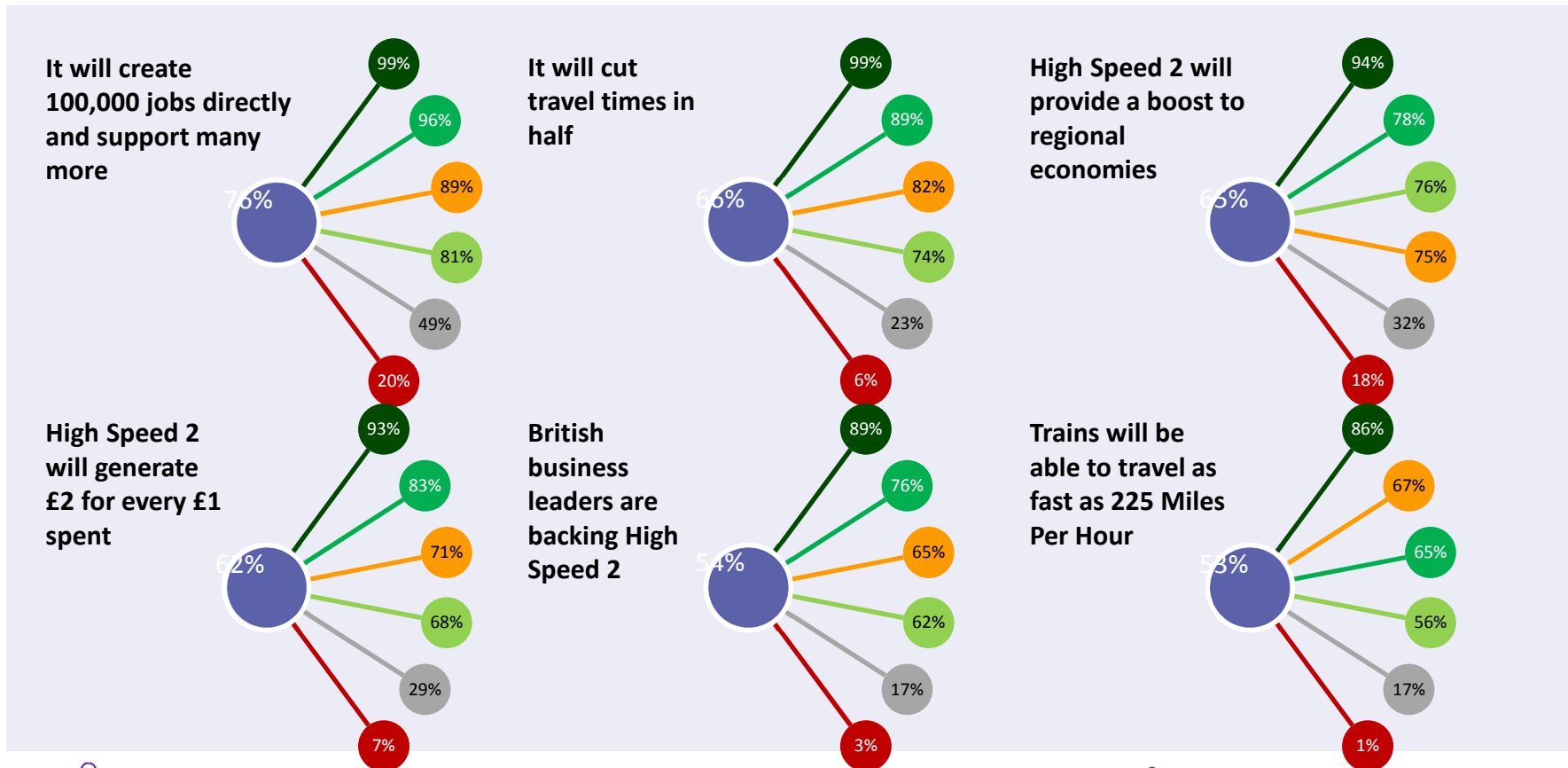
% who would be more likely to support HS2 as a result of the argument that...

“It will cut the time it takes to travel between London and Manchester and Leeds and between Birmingham and Manchester and Leeds in half”



Providing jobs is the most convincing argument for residents who are undecided

% who would be more likely to support HS2 as a result of each argument



p25 Base: Line of route (2,000)

■ Line of route
■ Support already
■ Inclined to support
■ Broadly supportive
■ Disengaged
■ Undecided
■ Opposed

Populus Limited
Northburgh House
10 Northburgh Street
London EC1V 0AT
www.populus.co.uk

Rick Nye
Director
T +44 [0]20 7253 9900
E rnye@populus.co.uk

Richard Bridger
Consultant
T +44 [0]20 7253 9900
E rbidger@populus.co.uk

