



Global Infrastructure

Public satisfaction and priorities

October 2016

Methodology

- These are the findings of the first Ipsos Infrastructure Index conducted via Global @dvisor.
- In total 18,517 interviews were conducted between 26 August and 9 September 2016 among adults aged 18-64 in the US and Canada, and adults aged 16-64 in all other countries.
- The survey was conducted in 26 countries around the world via the Ipsos Online Panel system: Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Columbia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.



Methodology

- Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Chile, Columbia, Hungary, India, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.
- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.
- In countries where internet penetration is approximately 60% or higher the data output generally reflects the overall population. Of the 26 countries surveyed, some yield results that are balanced to reflect the general population – Argentina, Australia, Belgium, Canada, China, France, Germany, Hungary, Italy, Japan, Poland, South Korea, Russia, Saudi Arabia, Spain, Sweden, Great Britain and the United States. The remaining countries surveyed – Brazil, Chile, Columbia, India, Mexico, Peru, South Africa, and Turkey - have lower levels of internet connectivity and reflect online populations that tend to be more urban and have higher education/income than the general population.
- Where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of don't knows or not stated responses.
- Data are weighted to match the profile of the population.

Satisfaction with national infrastructure



National infrastructure

Q

I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?



Base: 18,517 adults (online), 26 Aug-9 Sept

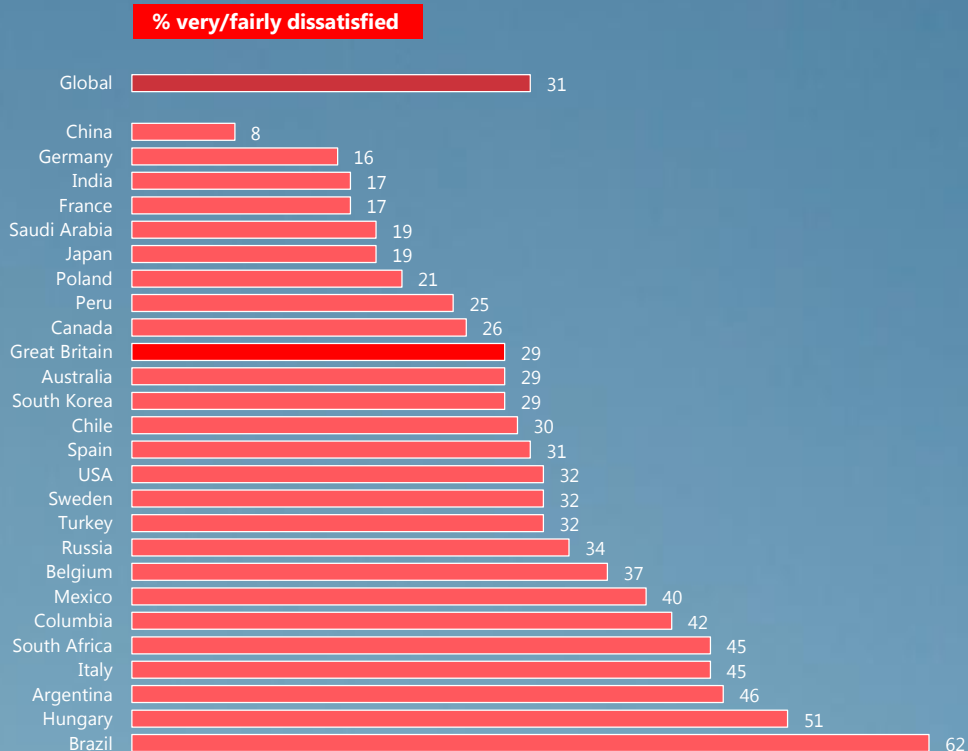
National infrastructure

Q

I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

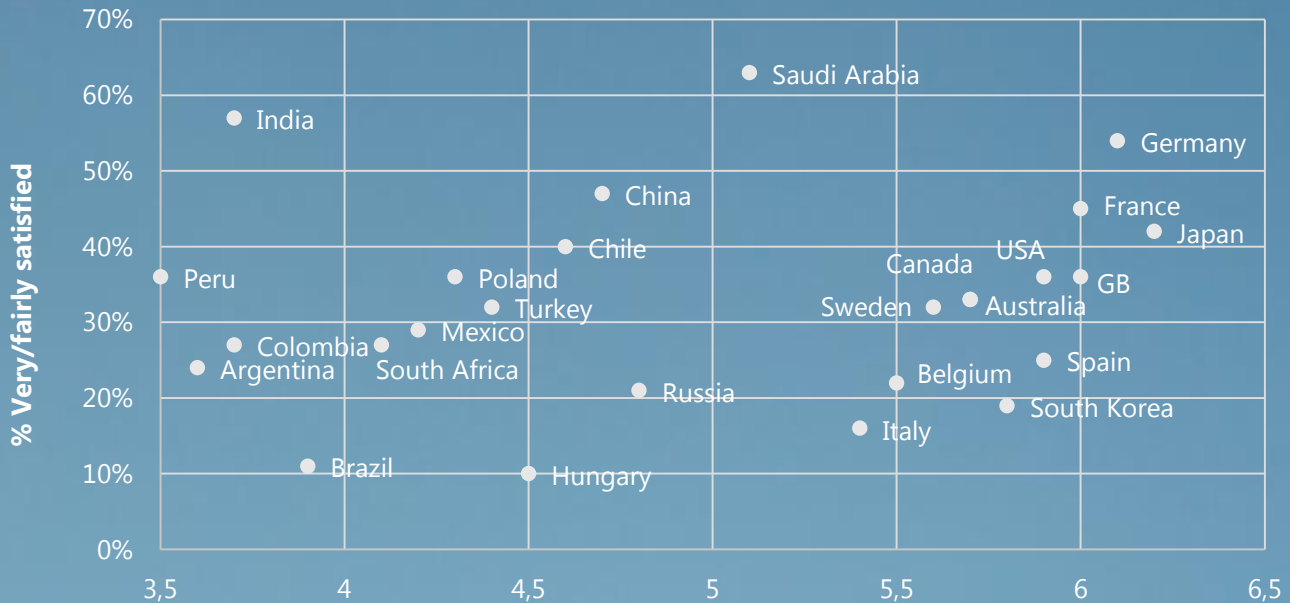
Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?



Base: 18,517 adults (online), 26 Aug-9 Sept

Comparison vs GCI

The World Economic Forum's Global Competitiveness Report 2015-2016 "assesses the competitiveness landscape of 140 economies, providing insight into the drivers of their productivity and prosperity." The chart below shows the GCI rating for infrastructure (1-7 where 7=best) plotted against the % very/fairly satisfied with national infrastructure from our survey.



Base: 18,517 adults (online), 26 Aug-9 Sept

Global Competitiveness Index – Infrastructure

<http://reports.weforum.org/global-competitiveness-report-2015-2016/competitiveness-rankings>

Ratings of types of infrastructure



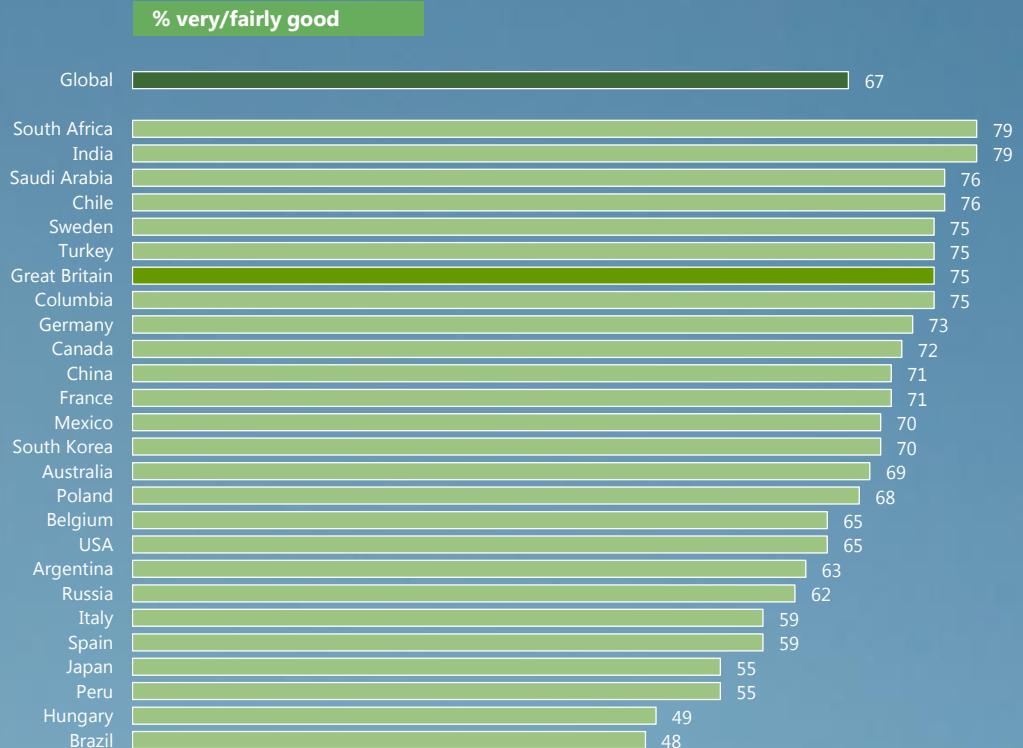
Airports

Q

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Airports



Base: 18,517 adults (online), 26 Aug-9 Sept

Motorway/major road network

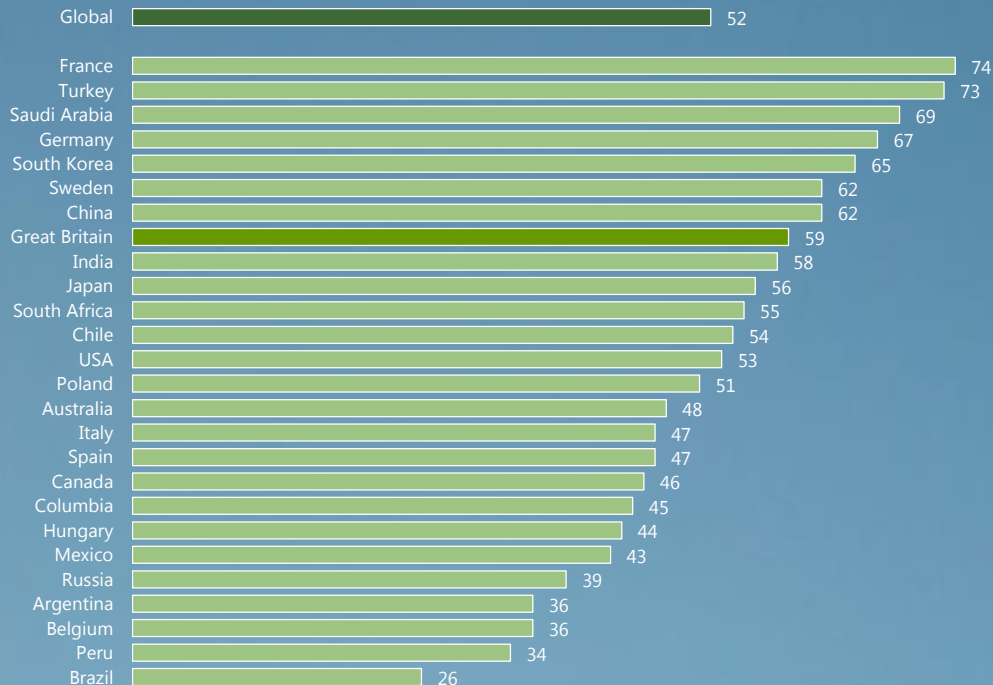
Q

% very/fairly good

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

The motorway/major road network



Base: 18,517 adults (online), 26 Aug-9 Sept

Local road network

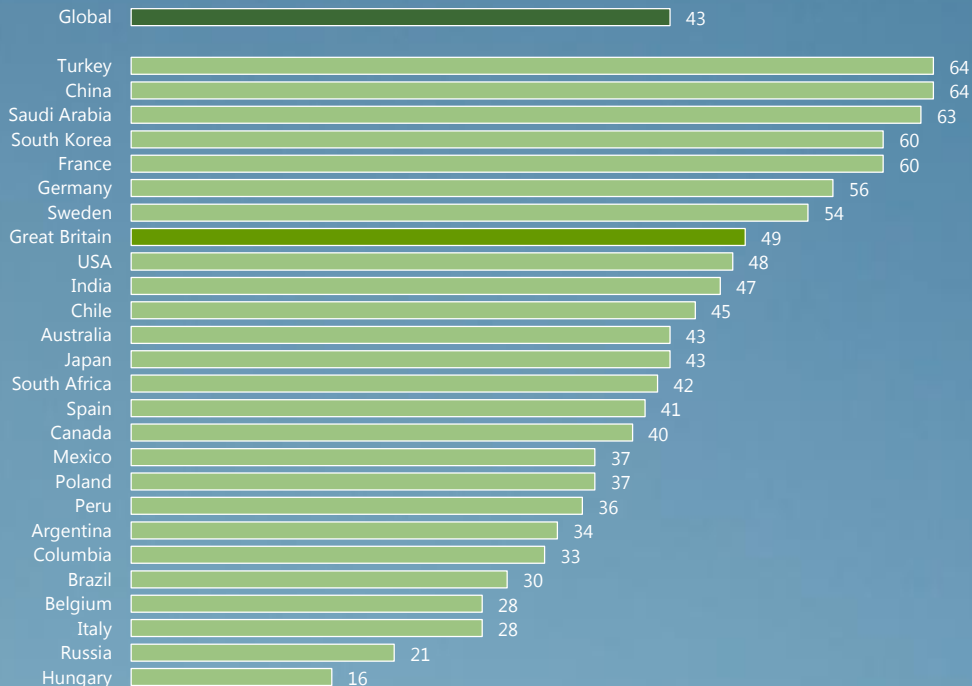
Q

% very/fairly good

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

The local road network



Base: 18,517 adults (online), 26 Aug-9 Sept

Rail infrastructure

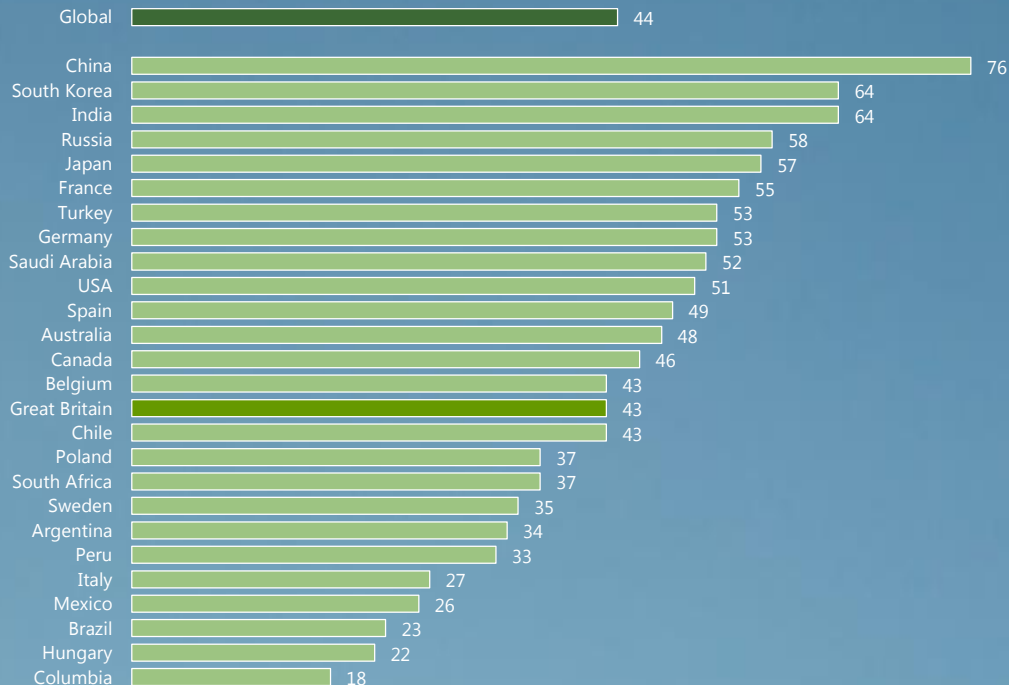
Q

% very/fairly good

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Rail infrastructure – track/stations



Base: 18,517 adults (online), 26 Aug-9 Sept

New housing supply

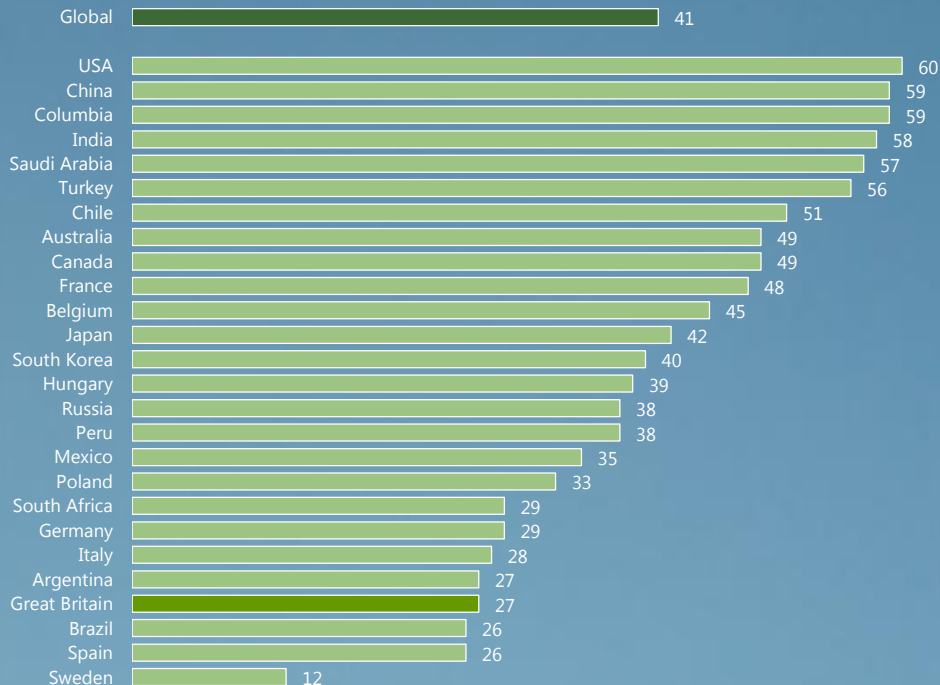
Q

% very/fairly good

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

New housing supply



Base: 18,517 adults (online), 26 Aug-9 Sept

Flood defences

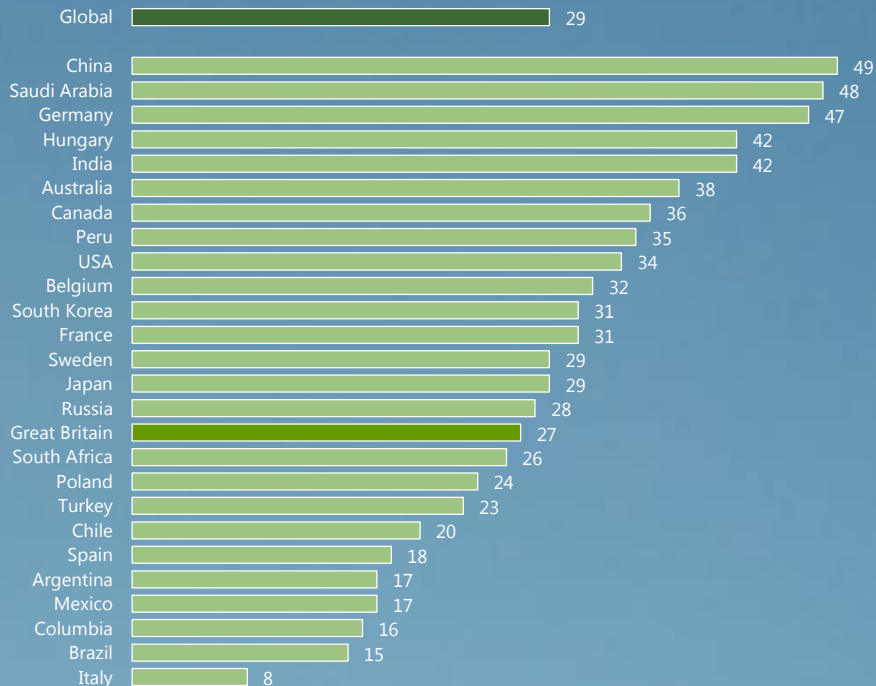
Q

% very/fairly good

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Flood defences



Base: 18,517 adults (online), 26 Aug-9 Sept

Energy (not nuclear)

Q

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Energy-generation infrastructure (excluding nuclear)



Base: 18,517 adults (online), 26 Aug-9 Sept

Nuclear

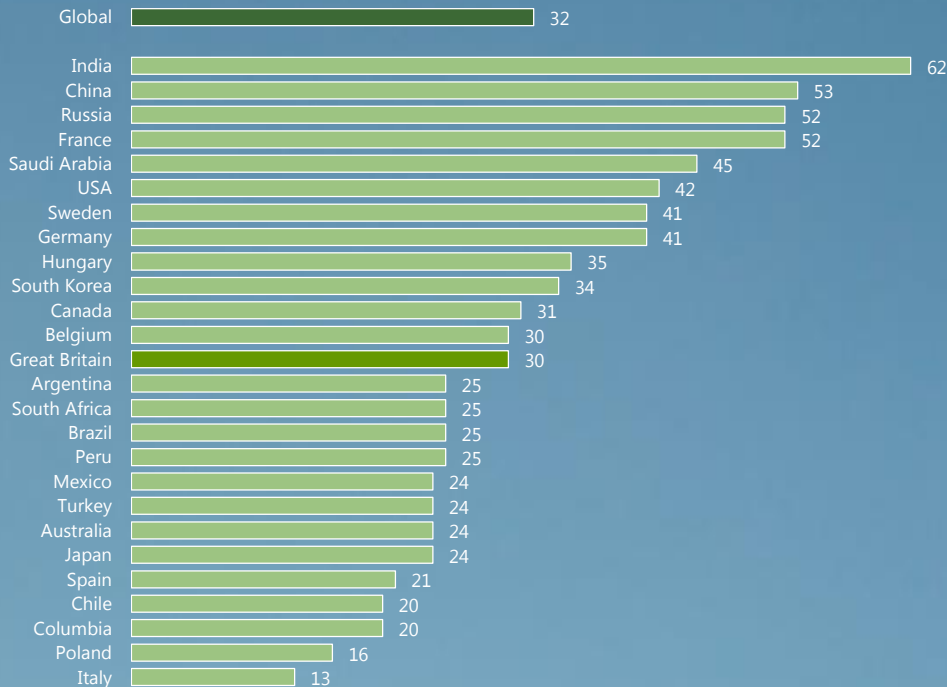
Q

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Nuclear infrastructure to generate energy

% very/fairly good



Base: 18,517 adults (online), 26 Aug-9 Sept

Water supply & sewerage

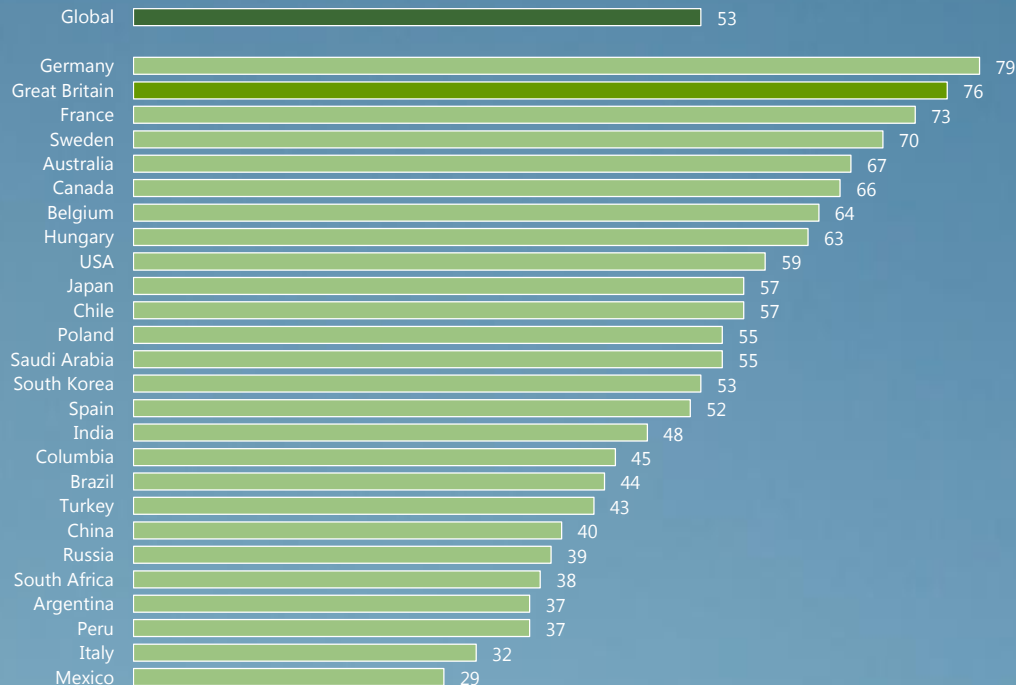
Q

% very/fairly good

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Water supply and sewerage



Base: 18,517 adults (online), 26 Aug-9 Sept

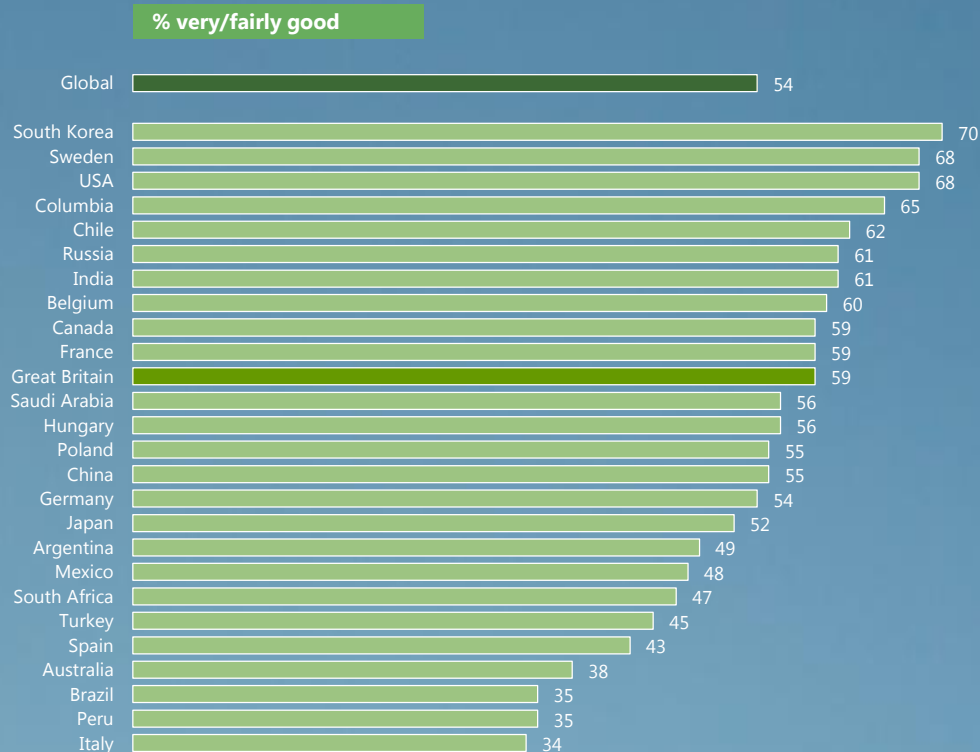
High speed broadband

Q

These next questions are about different types of infrastructure.

Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

High speed broadband



Base: 18,517 adults (online), 26 Aug-9 Sept

**Attitudes to
infrastructure
delivery
& funding**



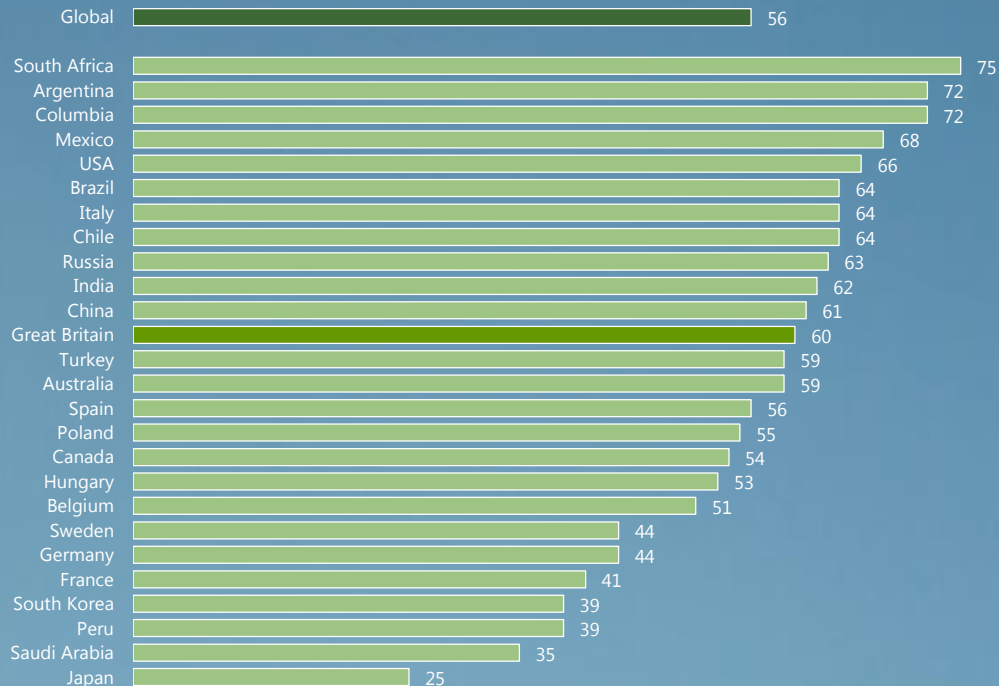
Not doing enough?

Q

% strongly/tend to agree

To what extent do you agree or disagree...?

As a country we are not doing enough to meet our infrastructure needs



Base: 18,517 adults (online), 26 Aug-9 Sept

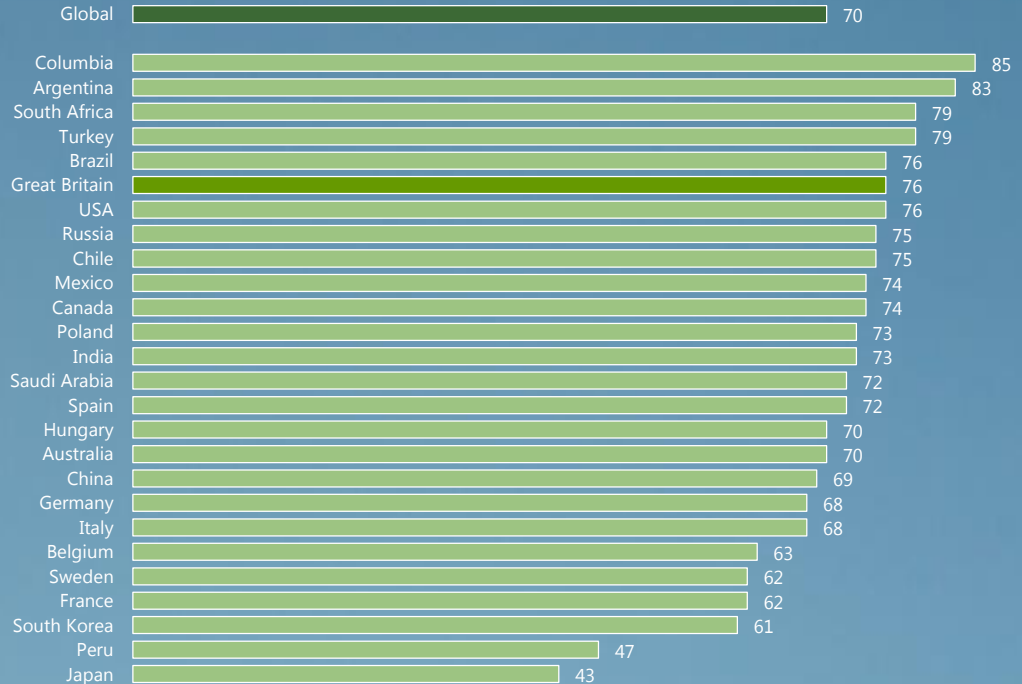
Investment vital to growth

Q

% strongly/tend to agree

To what extent do you agree or disagree...?

Investing in infrastructure is vital to [COUNTRY]'s future economic growth



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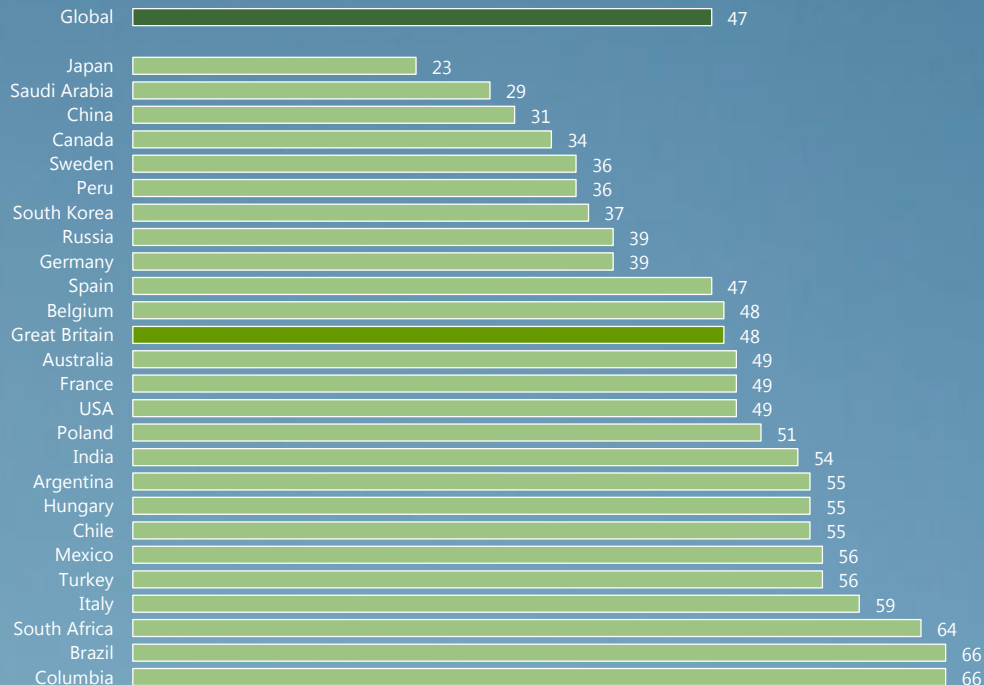
Poor record?

Q

% strongly/tend to agree

To what extent do you agree or disagree...?

[COUNTRY] has a poor record at getting national infrastructure projects right



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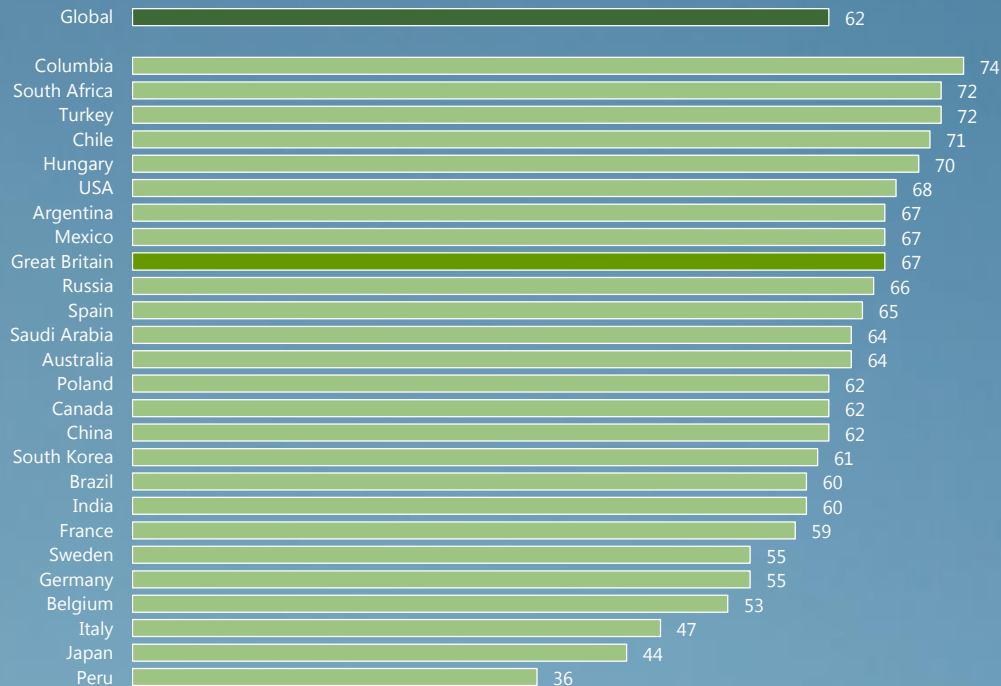
Local views

Q

% strongly/tend to agree

To what extent do you agree or disagree...?

Local communities' views on plans for infrastructure should be heard properly, even if it means delays



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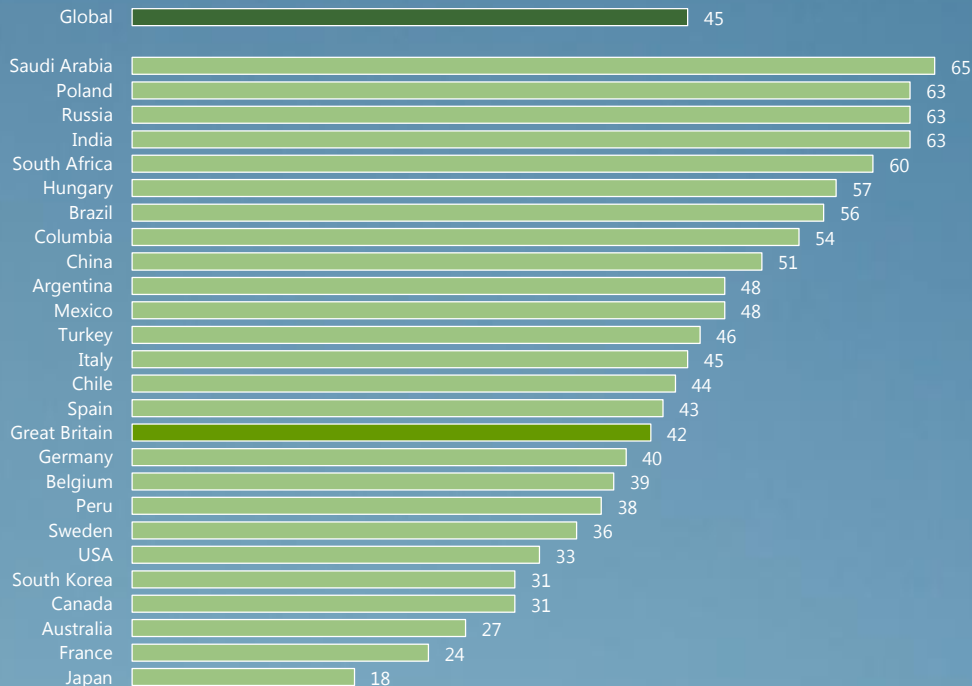
Foreign investment

Q

% strongly/tend to agree

To what extent do you agree or disagree...?

I'm fine with foreign investment in new infrastructure in [COUNTRY] if it means it gets built more quickly

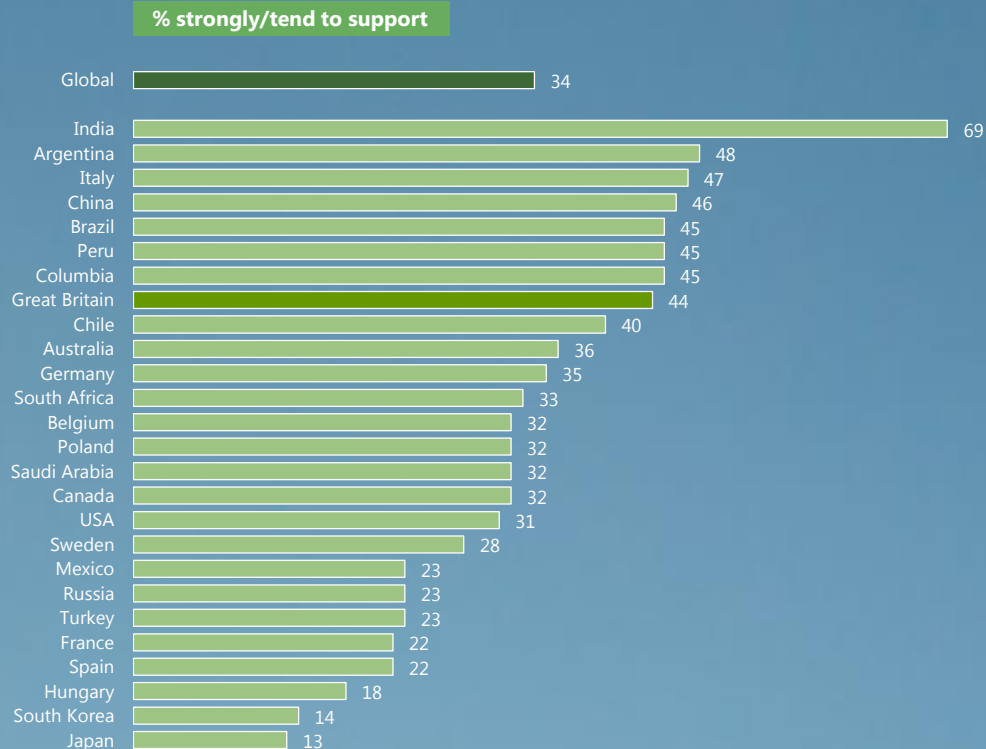


Base: 18,517 adults (online), 26 Aug-9 Sept

Borrow-to-build

Q

To what extent do you support or oppose the national Government in [COUNTRY] borrowing money to fund the building of more/better infrastructure?

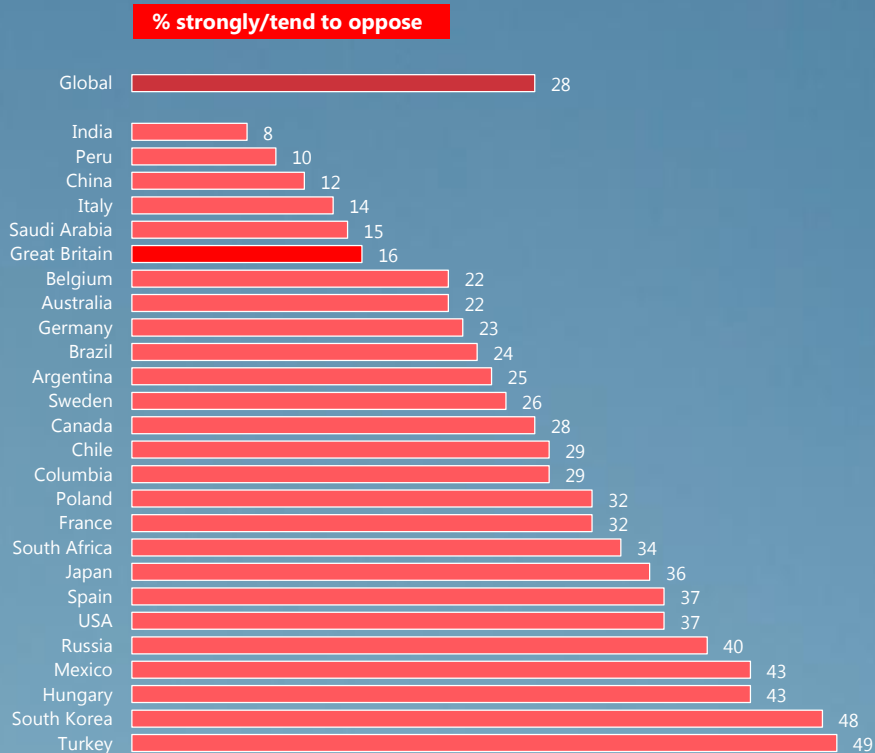


Base: 18,517 adults (online), 26 Aug-9 Sept

Borrow-to-build

Q

To what extent do you support or oppose the national Government in [COUNTRY] borrowing money to fund the building of more/better infrastructure?



Base: 18,517 adults (online), 26 Aug-9 Sept

Contacts

The background of the slide is a photograph of a crane against a clear blue sky. The crane's long jib extends diagonally from the bottom left towards the top right. The crane's structure is dark, and the sky is a uniform light blue. The crane's jib is supported by a complex lattice of steel beams. At the top of the jib, there are several small lights or sensors. The crane's base is partially visible at the bottom of the frame, showing a vertical support post and a horizontal beam.

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Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” - our tagline - summarises our ambition.