



Ipsos

# Australia's infrastructure

## Public satisfaction and priorities

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# Methodology

- These are the findings of the Global @dvisor Infrastructure Index 2016. In total 18,517 interviews were conducted between 26 August and 9 September 2016 in 26 countries around the world via the Ipsos Online Panel system.
- In Australia, the sample was 1,000 adults aged 16-64. Data are weighted to match the profile of the 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. Rounding may also be the reason why combinations e.g. % good differ from the sum of % very good + % fairly good.
- Full details are available at [www.ipsos.com.au](http://www.ipsos.com.au)



# Public lukewarm on Australia's infrastructure

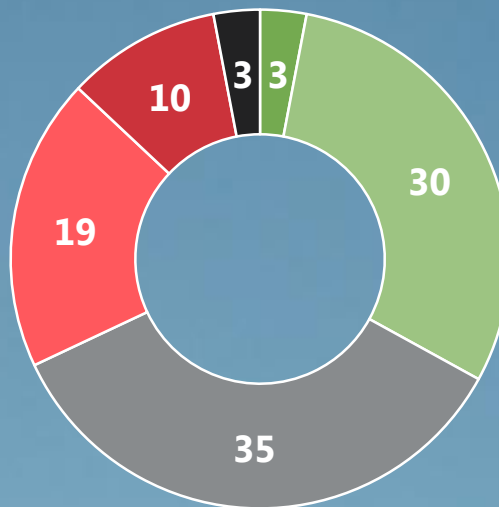
■ % Very satisfied    ■ % Fairly satisfied    ■ % Neither/nor  
■ % Fairly dissatisfied    ■ % Very dissatisfied    ■ % Don't know

Q

I now want you to think about Australia'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 Australia's national infrastructure?



Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

Satisfied	Dissatisfied
33%	29%

# We are equal to the global average

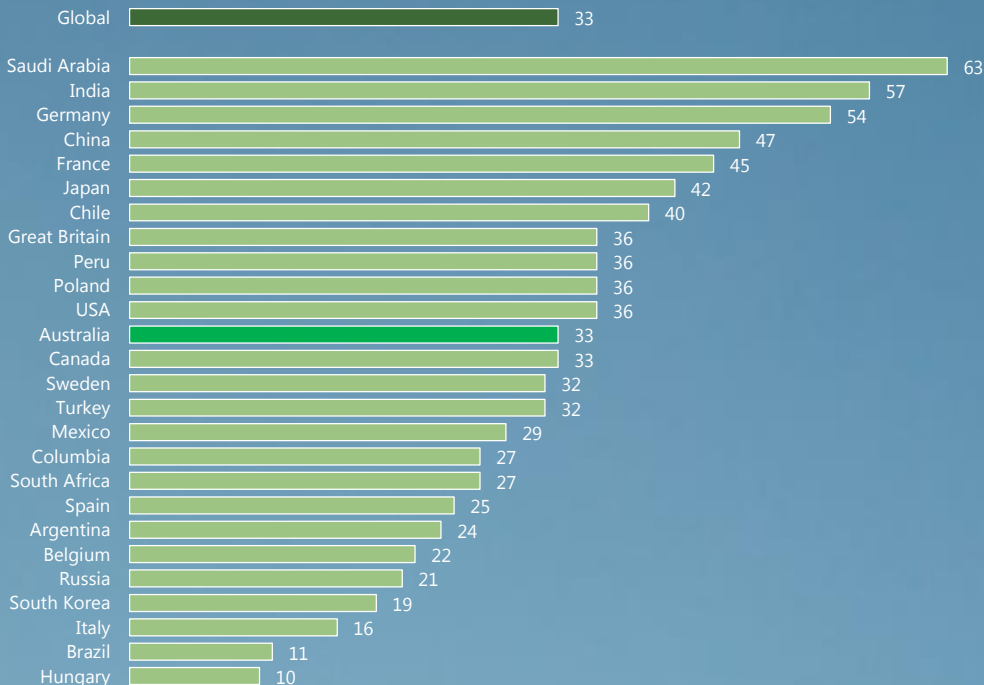
Q

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?

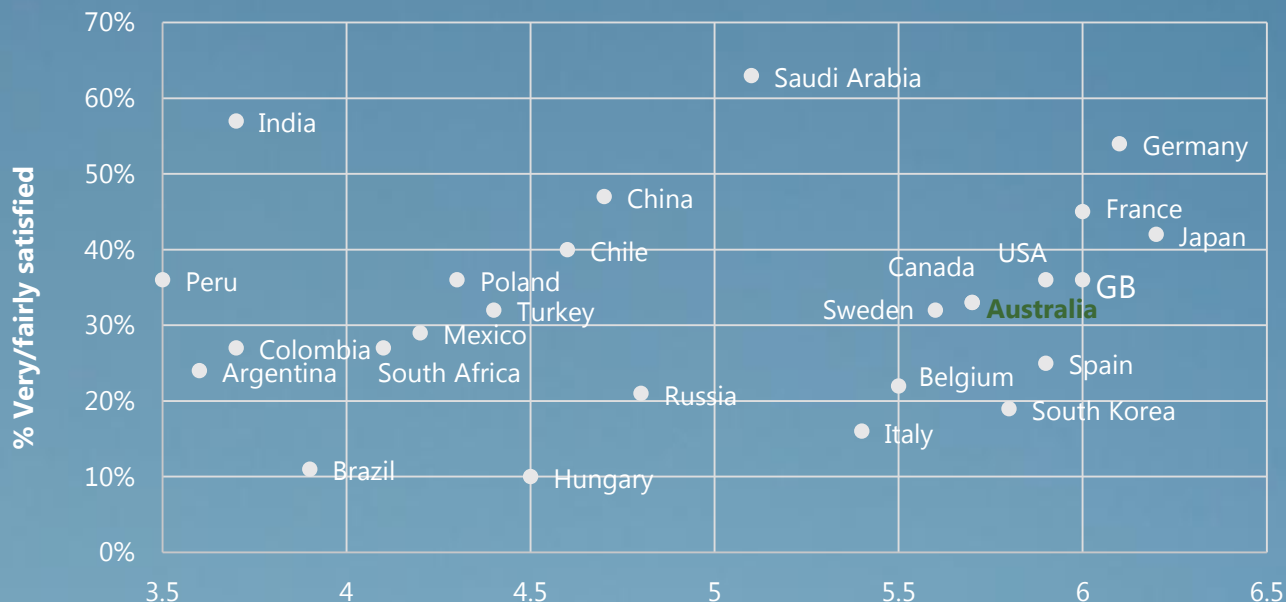
% very/fairly satisfied



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

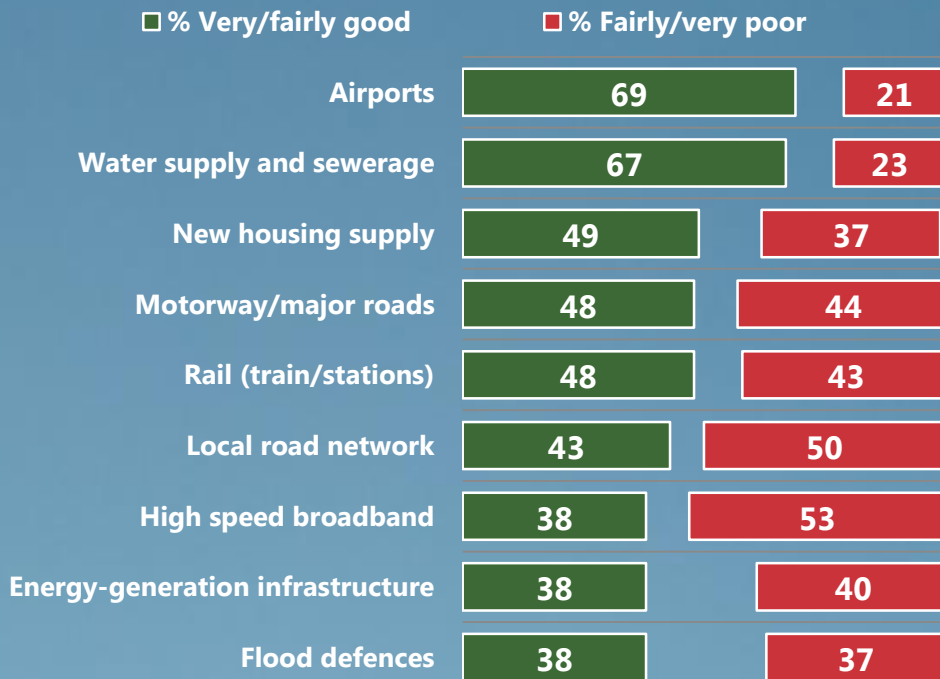
<http://reports.weforum.org/global-competitiveness-report-2015-2016/competitiveness-rankings>

# Variation in ratings of different types

**Q**

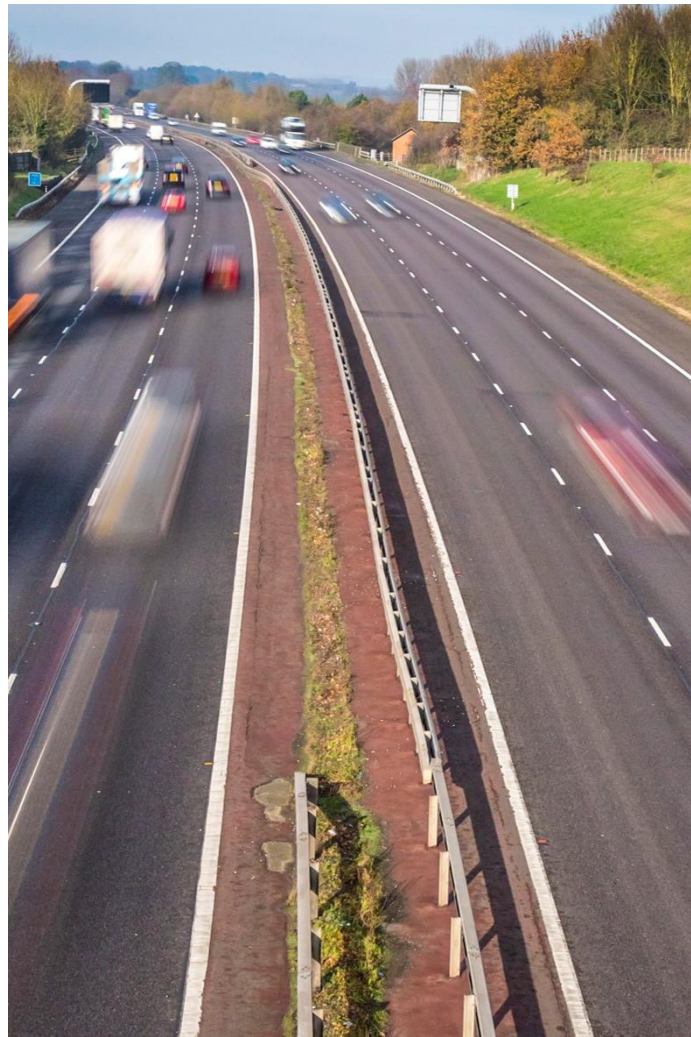
These next questions are about different types of infrastructure in Australia.

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



# Transport

- Seven in ten citizens, 69%, rate airports positively.
- The public rate the motorway/major road network, rail infrastructure (track/stations) and the local road network similarly, although they are more negative about the latter.



# Airports – positive ratings

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

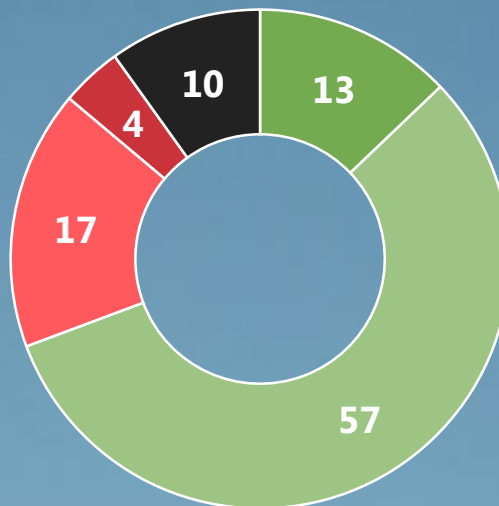
■ % Don't know

**Q**

These next questions are about different types of infrastructure in Australia.

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

**Airports**



Good	Poor
69%	21%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept



# Rail – more positive than negative

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

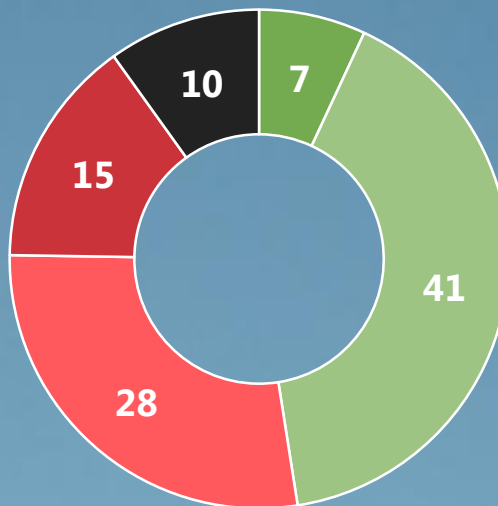
■ % Don't know

Q

These next questions are about different types of infrastructure in Australia.

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

Rail infrastructure – track/stations



Good	Poor
48%	43%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Citizens split on the Major Road Network

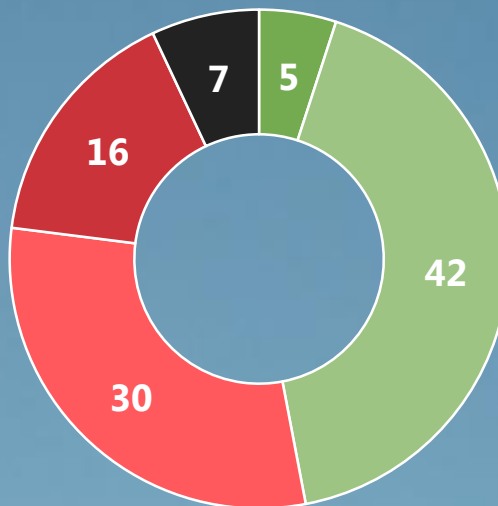
■ % Very good      ■ % Fairly good      ■ % Fairly poor  
■ % Very poor      ■ % Don't know

**Q**

These next questions are about different types of infrastructure in Australia.

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

The motorway/major road network



Good	Poor
47%	46%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Local roads – more negative than positive

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

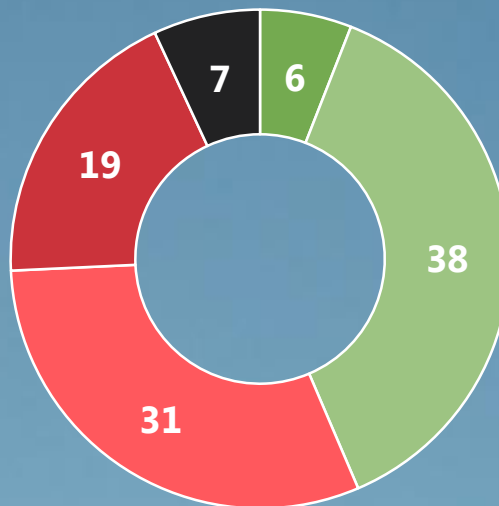
■ % Don't know

**Q**

These next questions are about different types of infrastructure in Australia.

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

The local road network



Good	Poor
43%	50%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Housing supply

- 49% of the public rate new housing supply as fairly or very good in Australia.
- 37% rate it as poor, which includes 13% rating this as very poor.
- Other Ipsos research shows that the key concern with housing is that of affordability.



# Housing supply – more positive than negative

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

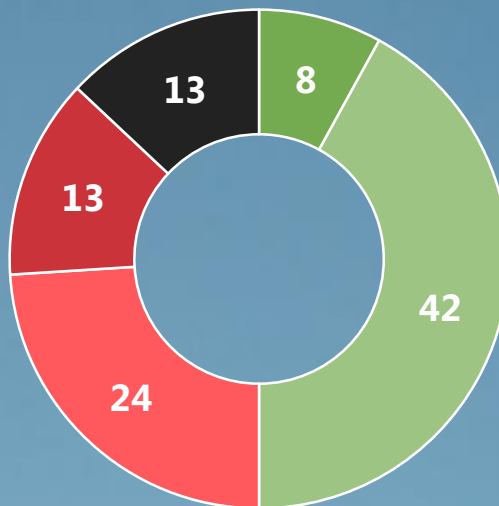
■ % Don't know

**Q**

These next questions are about different types of infrastructure in Australia.

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

New housing supply

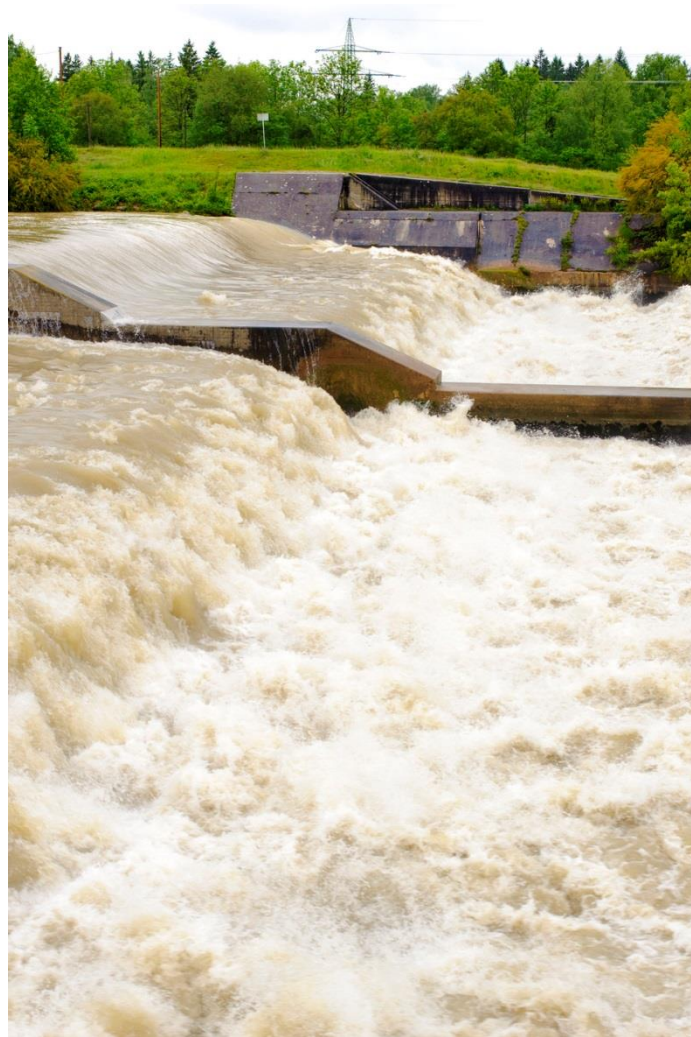


Good	Poor
49%	37%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Environment & energy

- The public are evenly split on the quality of our flood defences.
- They are also split in regards to the quality of energy-generation infrastructure (excluding nuclear), with 38% are negative, and 40% positive.



# Citizens evenly split on flood defences

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

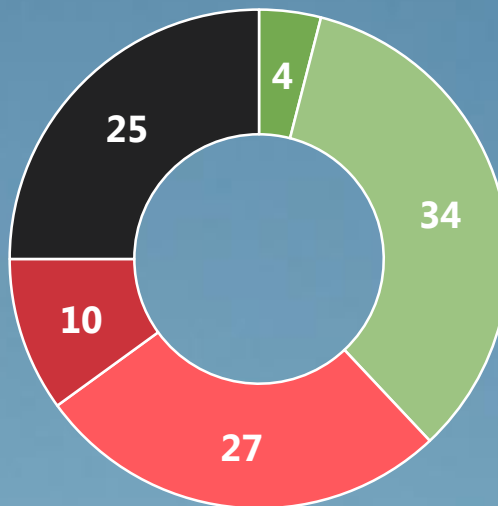
■ % Don't know

**Q**

These next questions are about different types of infrastructure in Australia.

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

**Flood defences**



Good	Poor
38%	37%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Views on energy also split

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

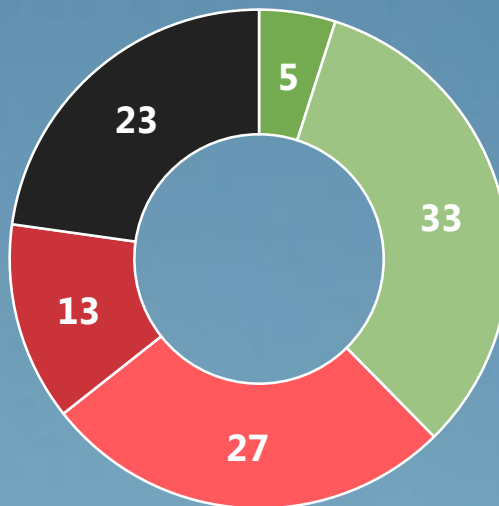
■ % Don't know

**Q**

These next questions are about different types of infrastructure in Australia.

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

Energy-generation infrastructure (excluding nuclear)



Good	Poor
38%	40%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept



## Other utilities

- Water supply and sewerage is rated positively by two thirds, with half rating it as as very good.
- This makes it one of the top-rated areas of infrastructure, second only to airports.
- Broadband attracts the worst ratings with 53% very/fairly poor compared to only 38% very/fairly good.



# Water and sewerage viewed positively

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

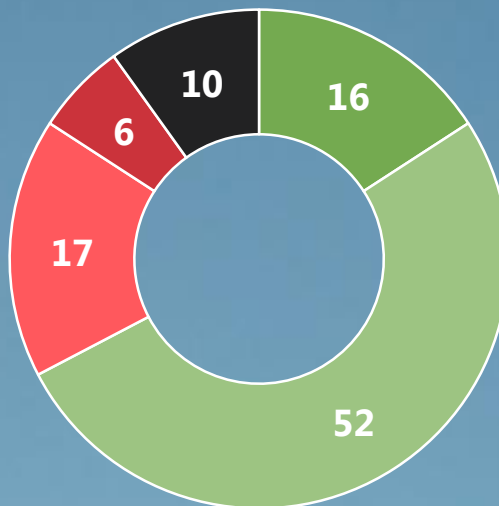
■ % Don't know

**Q**

These next questions are about different types of infrastructure in Australia.

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

Water supply and sewerage



Good	Poor
67%	23%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Broadband overwhelmingly negative

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

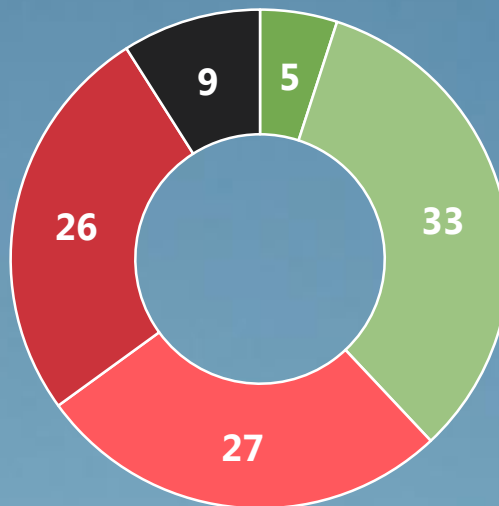
■ % Don't know

Q

These next questions are about different types of infrastructure in Australia.

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

High speed broadband



Good	Poor
38%	53%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Australia one of the least satisfied with their broadband

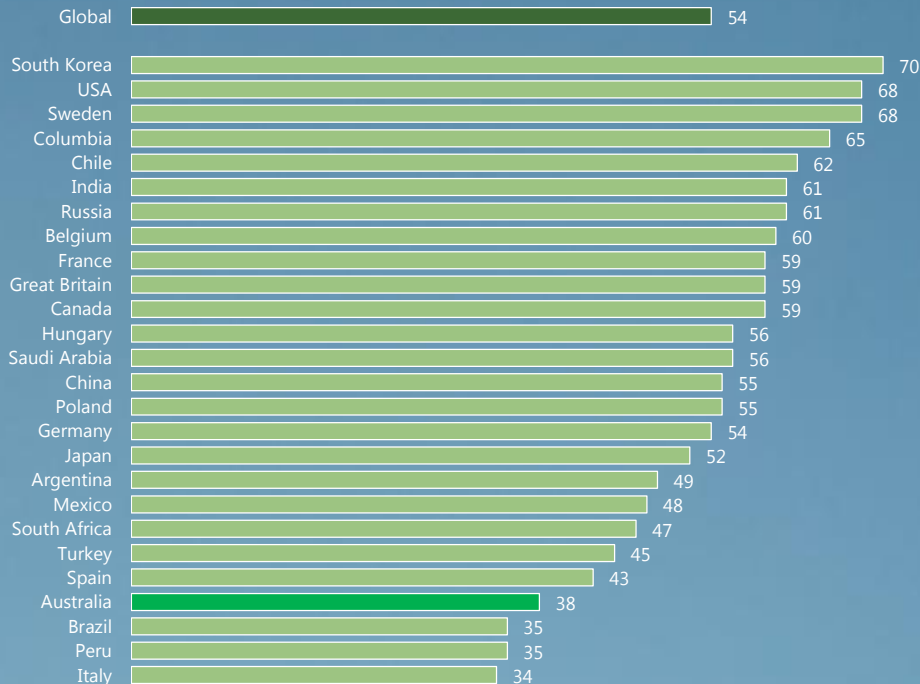
Q

% very/fairly good

These next questions are about different types of infrastructure in [COUNTRY].

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

High speed broadband



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

# Attitudes

- 59% agree that 'we are not doing enough to meet our infrastructure needs', while 70% are of the view that investment in infrastructure is vital to future economic growth.
- However, there are more against foreign investment than for it (39% against vs 27% for it) even if it means that projects can be delivered more quickly.
- At the same time, though, 64% justify delays to infrastructure projects if it means that local communities' views can be heard properly.



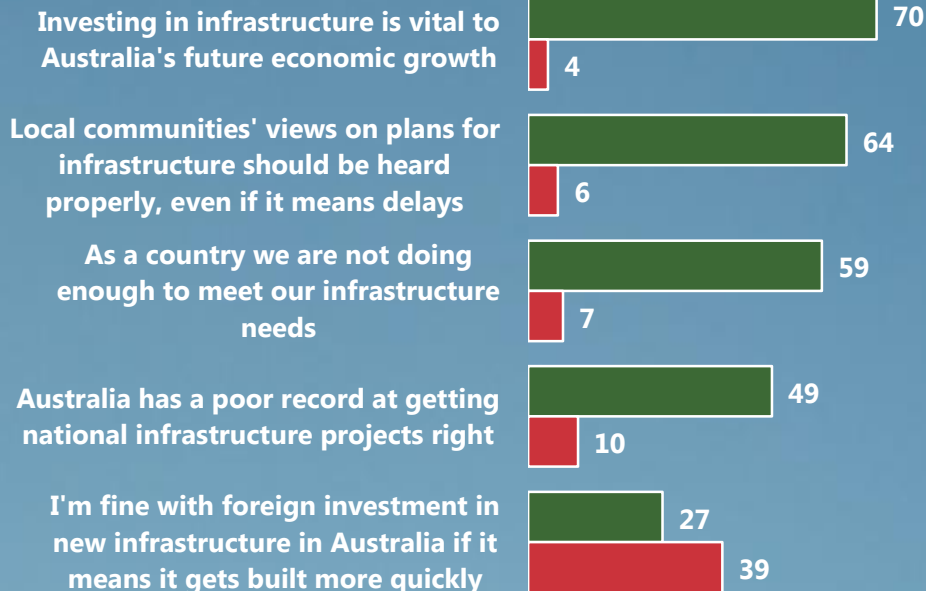
# Foreign investment in infrastructure is divisive

■ % Strongly/tend to agree

■ % Strongly/tend to disagree

Q

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



Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

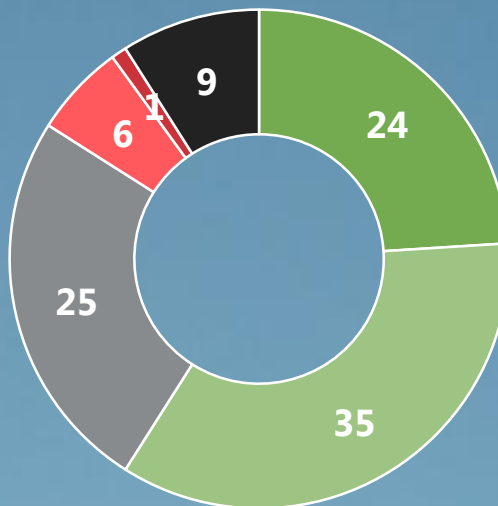
# Sense that we are not doing enough

■ % Strongly agree    ■ % Tend to agree    ■ % Neither/nor  
■ % Tend to disagree    ■ % Strongly disagree    ■ % Don't know

Q

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

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



Agree	Disagree
59%	7%

Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

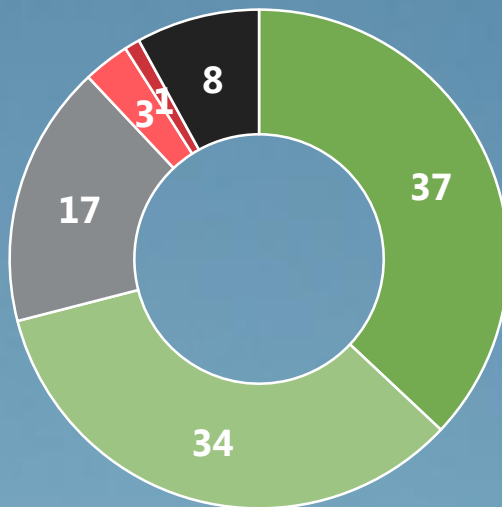
# Infrastructure vital to growth

■ % Strongly agree    ■ % Tend to agree    ■ % Neither/nor  
■ % Tend to disagree    ■ % Strongly disagree    ■ % Don't know

Q

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

Investing in infrastructure is vital to Australia's future economic growth



Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

Agree	Disagree
70%	4%



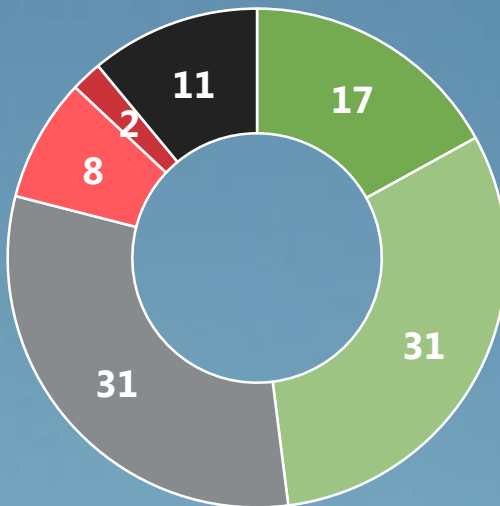
# By 5:1 we have a poor record

■ % Strongly agree    ■ % Tend to agree    ■ % Neither/nor  
■ % Tend to disagree    ■ % Strongly disagree    ■ % Don't know

Q

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

Australia has a poor record at getting national infrastructure projects right



Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

Agree	Disagree
49%	10%

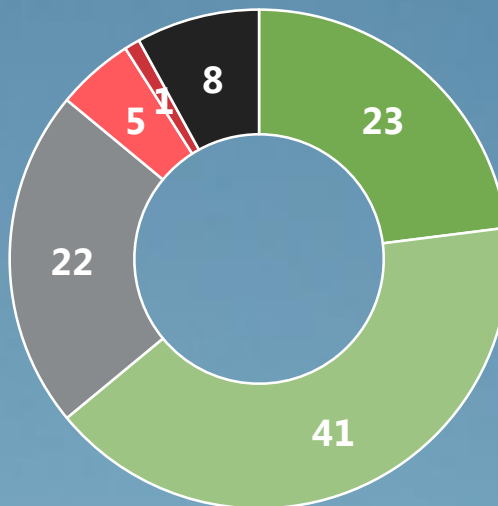
# Local views matter

■ % Strongly agree    ■ % Tend to agree    ■ % Neither/nor  
■ % Tend to disagree    ■ % Strongly disagree    ■ % Don't know

Q

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

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



Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

Agree	Disagree
64%	6%

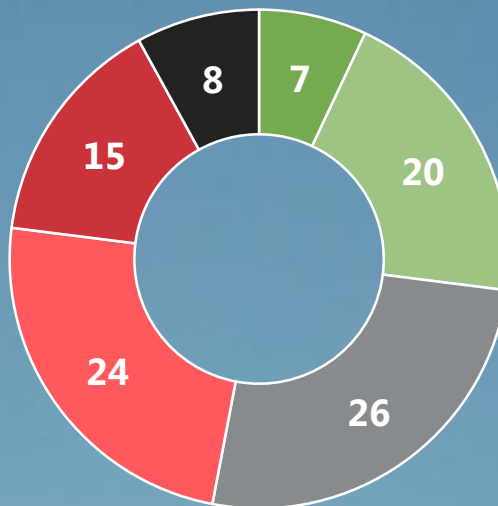
# Clear opposition to foreign investment

■ % Very satisfied    ■ % Fairly satisfied    ■ % Neither/nor  
■ % Fairly dissatisfied    ■ % Very dissatisfied    ■ % Don't know

Q

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

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



Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

Agree	Disagree
27%	39%

# Australia one the least open to foreign investment in infrastructure

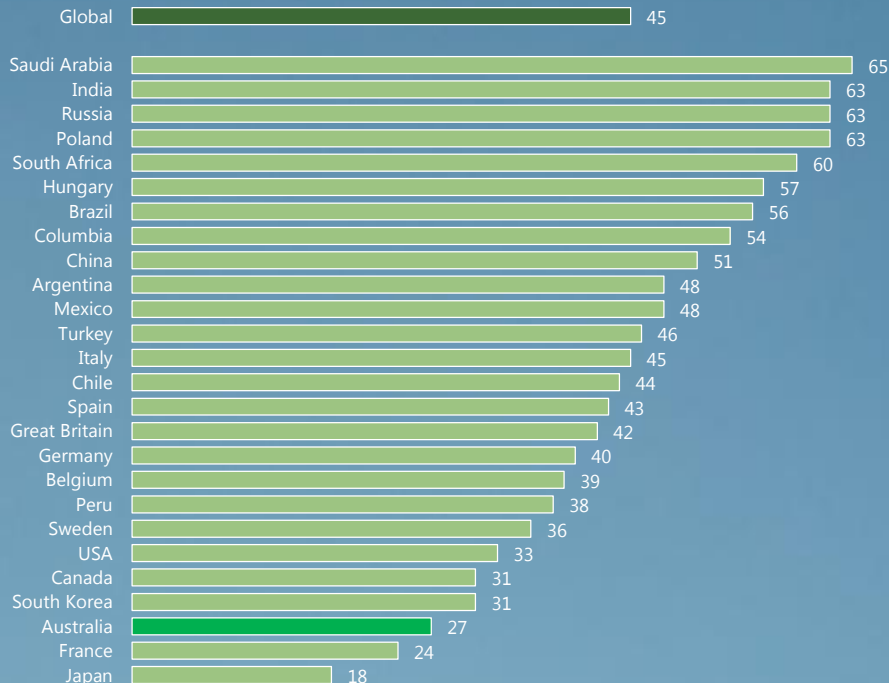
Q

% strongly/tend to agree

These next questions are about different types of infrastructure in [COUNTRY].

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

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



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

# Priorities

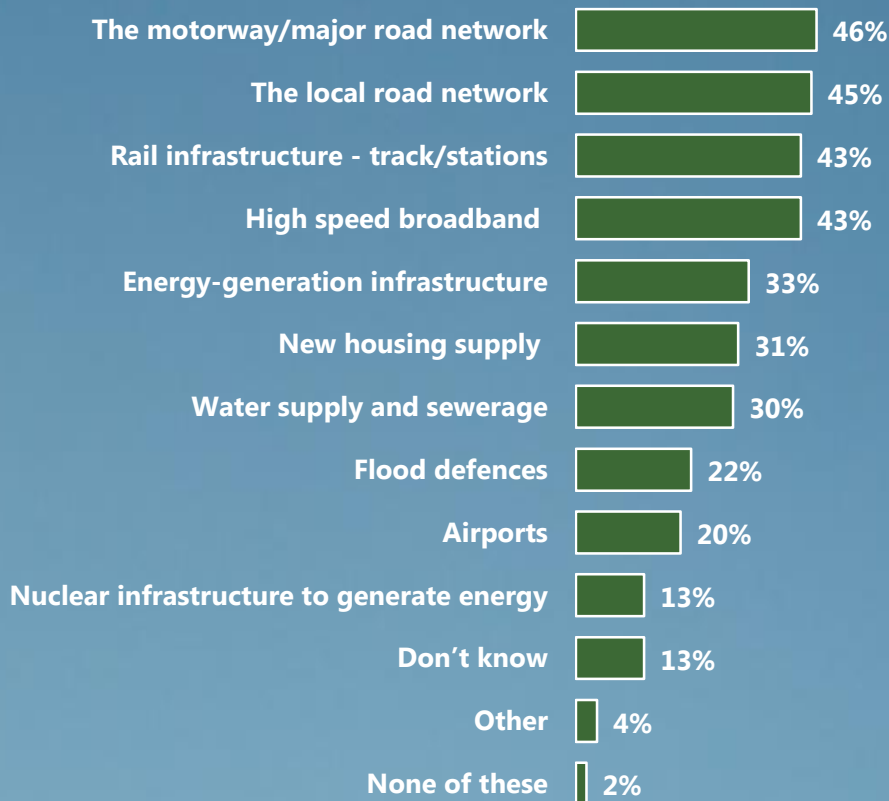
- Priorities for investment are motorway/major road network (46%), the local road network (45%), rail infrastructure (43%), and high speed broadband (43%).
- Limited support (36%) for Government borrowing money to fund investment in better/more infrastructure, with 22% opposed and 42% unsure either way.



# Roads, rail and highspeed broadband are top priorities

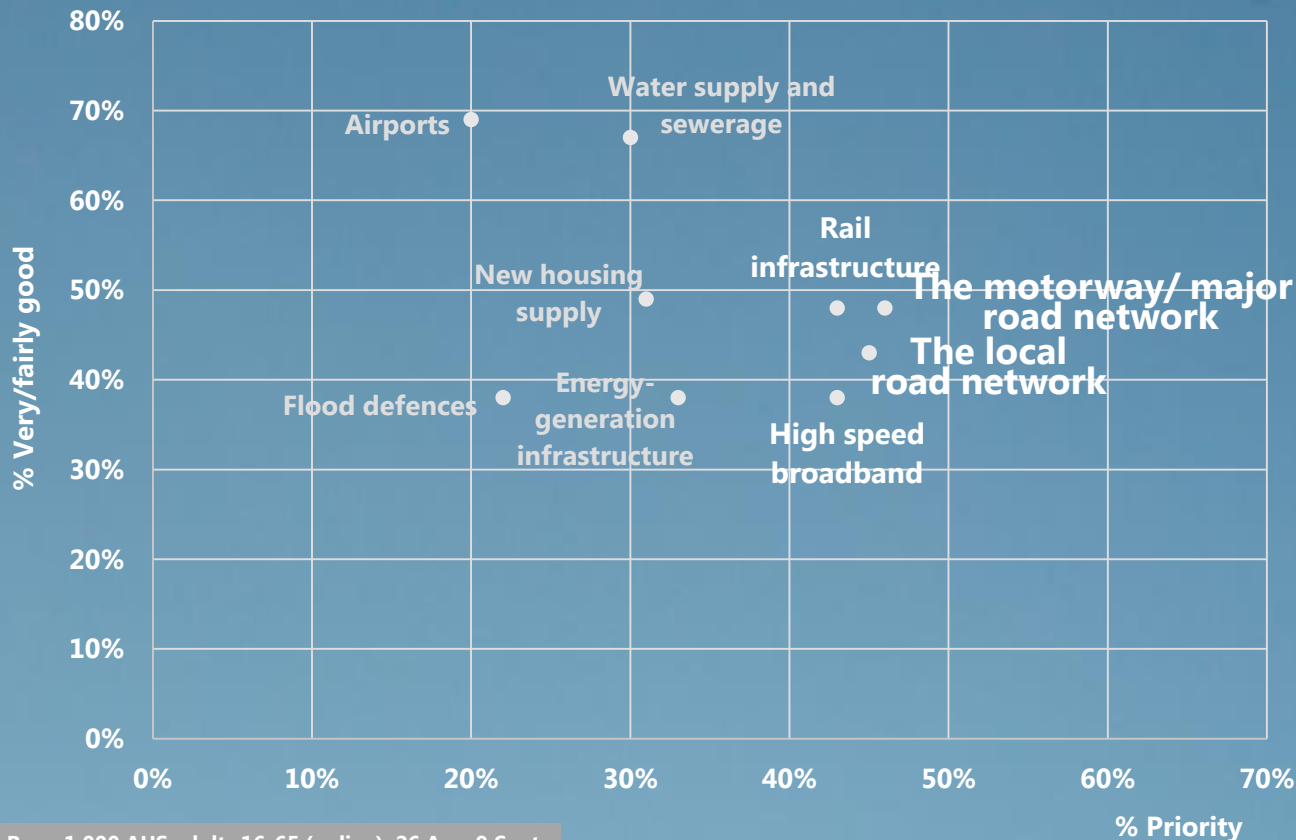
Q

Which of these types of infrastructure, if any, do you think should be made a priority for investment for Australia?



Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Summary: priorities vs ratings



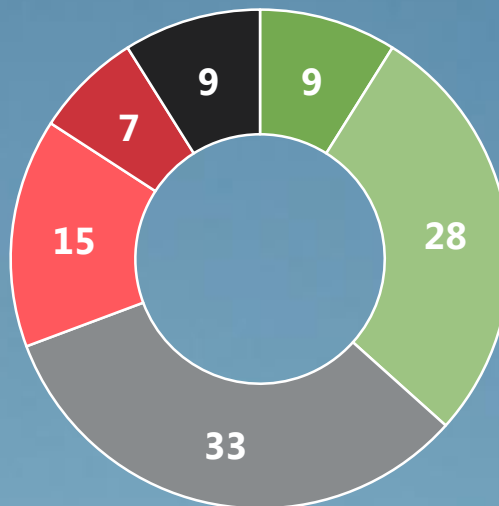
Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

# Limited support for borrowing

■ % Strongly support   ■ % Tend to support   ■ % Neither/nor  
■ % Tend to oppose   ■ % Strongly oppose   ■ % Don't know

Q

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



Base: 1,000 AUS adults 16-65 (online), 26 Aug-9 Sept

Support	Oppose
36%	22%

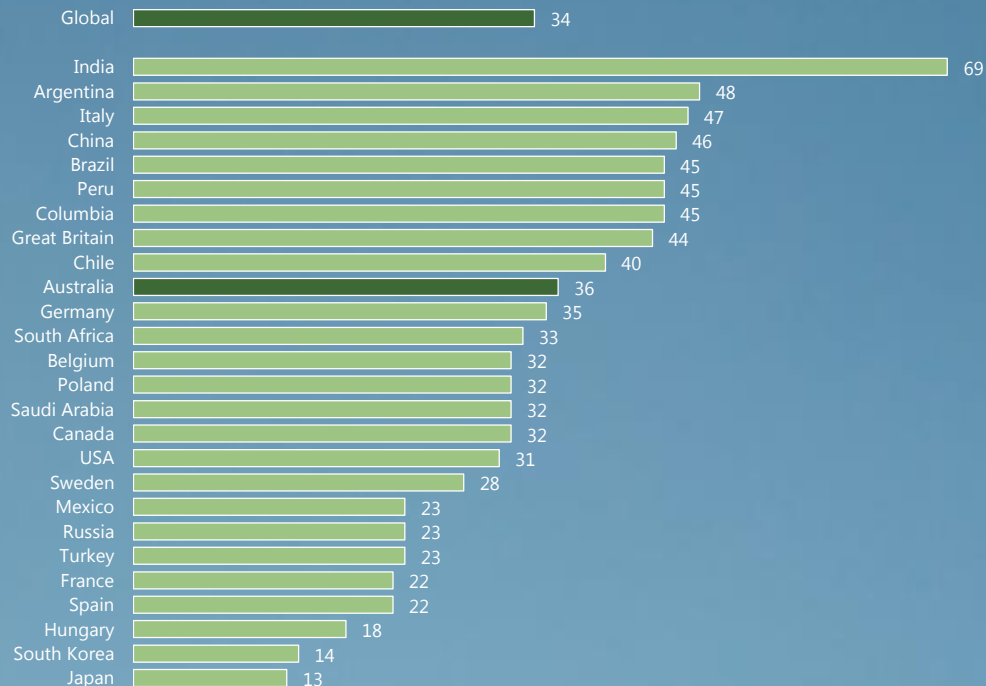


# Average support for borrow-to-build

Q

% strongly/tend to support

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

# Summary

Public accept  
case for  
investment in  
infrastructure.

Wide variation in  
ratings of  
different types  
of infrastructure:  
roads, rail and  
high speed  
broadband the  
top priority.

More against  
foreign  
investment than  
for it, even if it  
speeds  
progress.  
Communities  
want to be  
consulted.



Ipsos MORI

# Further information

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