

Global Infrastructure Index

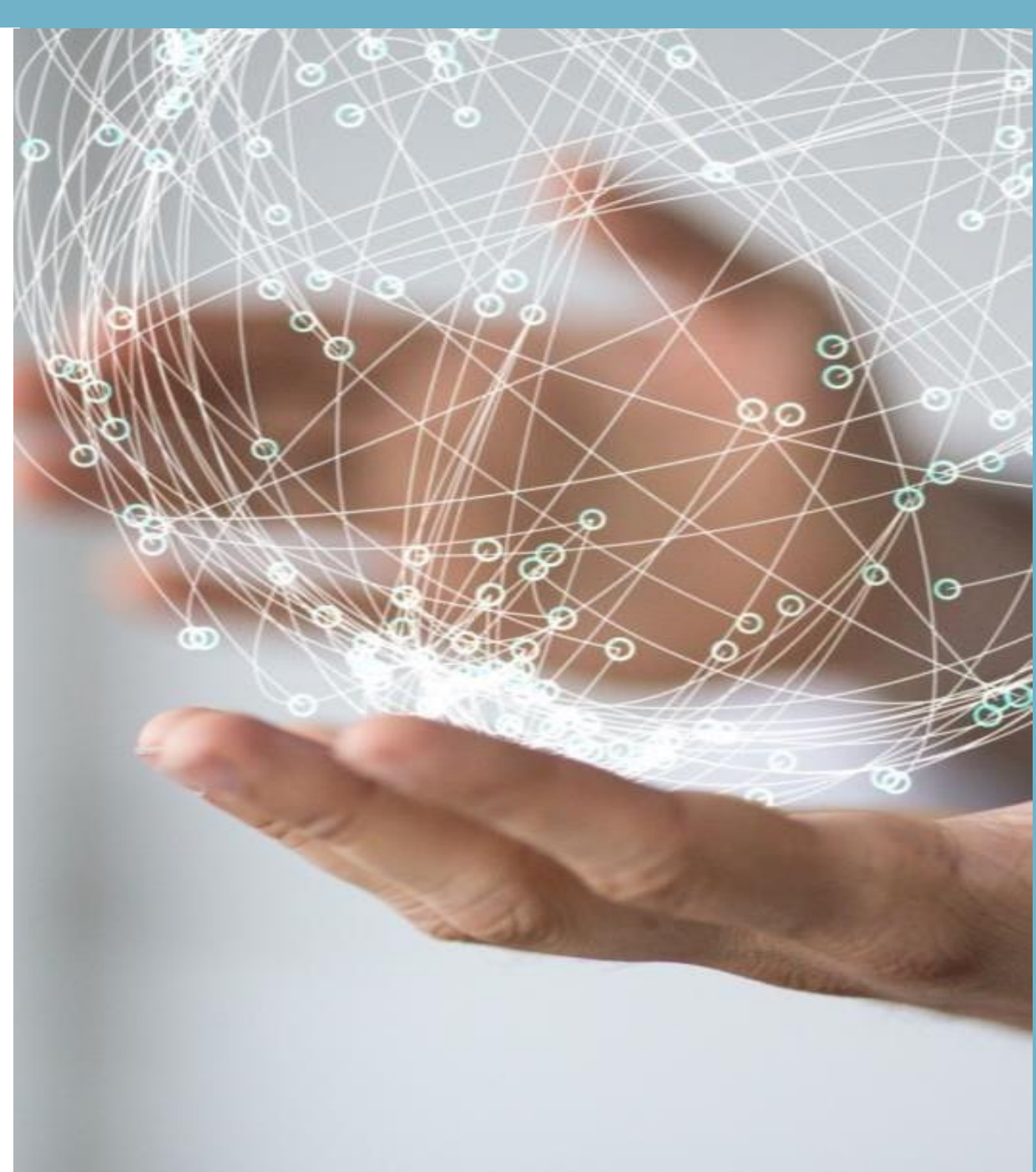
Public satisfaction and priorities

September 2017



Ipsos MORI
Social Research Institute

Methodology



Methodology

- These are the findings of the first Ipsos Infrastructure Index conducted via Global @dvisor.
- In total 21,043 interviews were conducted between 25 August and 8 September 2017 among adults aged 18-64 in the US and Canada, and adults aged 16-64 in all other countries.
- The survey was conducted in 28 countries around the world via the Ipsos Online Panel system:

Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Mexico, New Zealand, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Serbia, Spain, Sweden, Turkey and the United States of America (N.B. some questions were not fielded in China, and New Zealand)

- The 2016 survey used the same methodology but was conducted in 26 countries between 26 August and 9 September 2016 (New Zealand and Serbia were added in in 2017). This means that the global trend does not involve a like-for-like comparison.
- A selection of trends are included. Further information is available from **ben.marshall@ipsos.com**

National

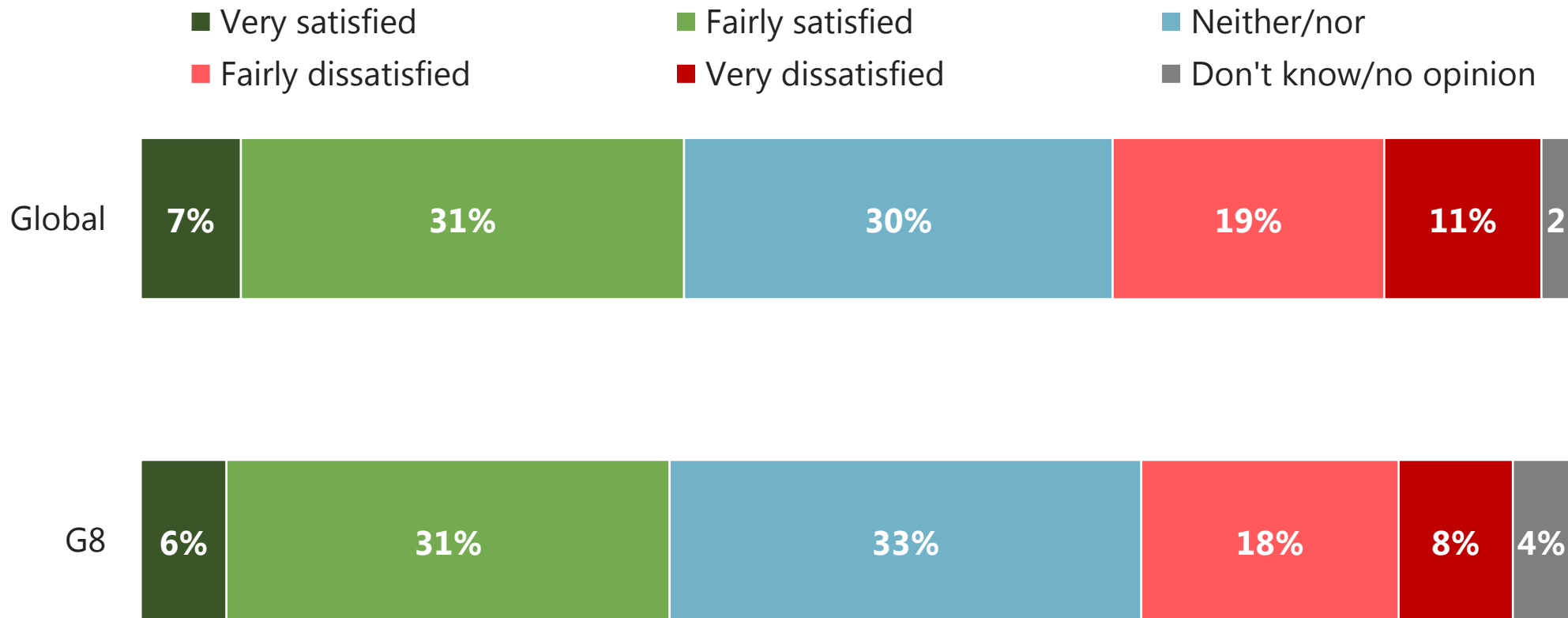
infrastructure



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?



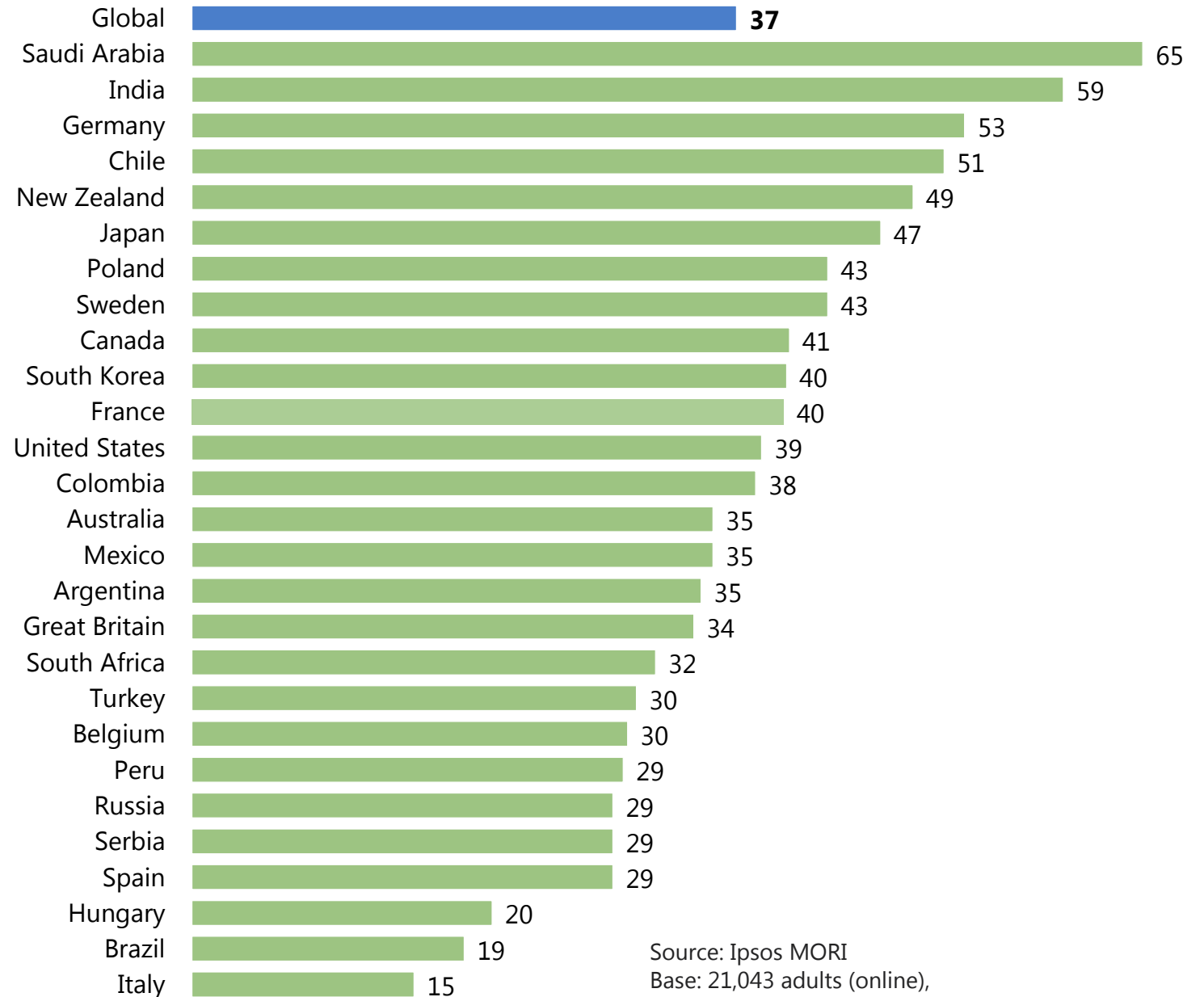
Satisfaction

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



Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

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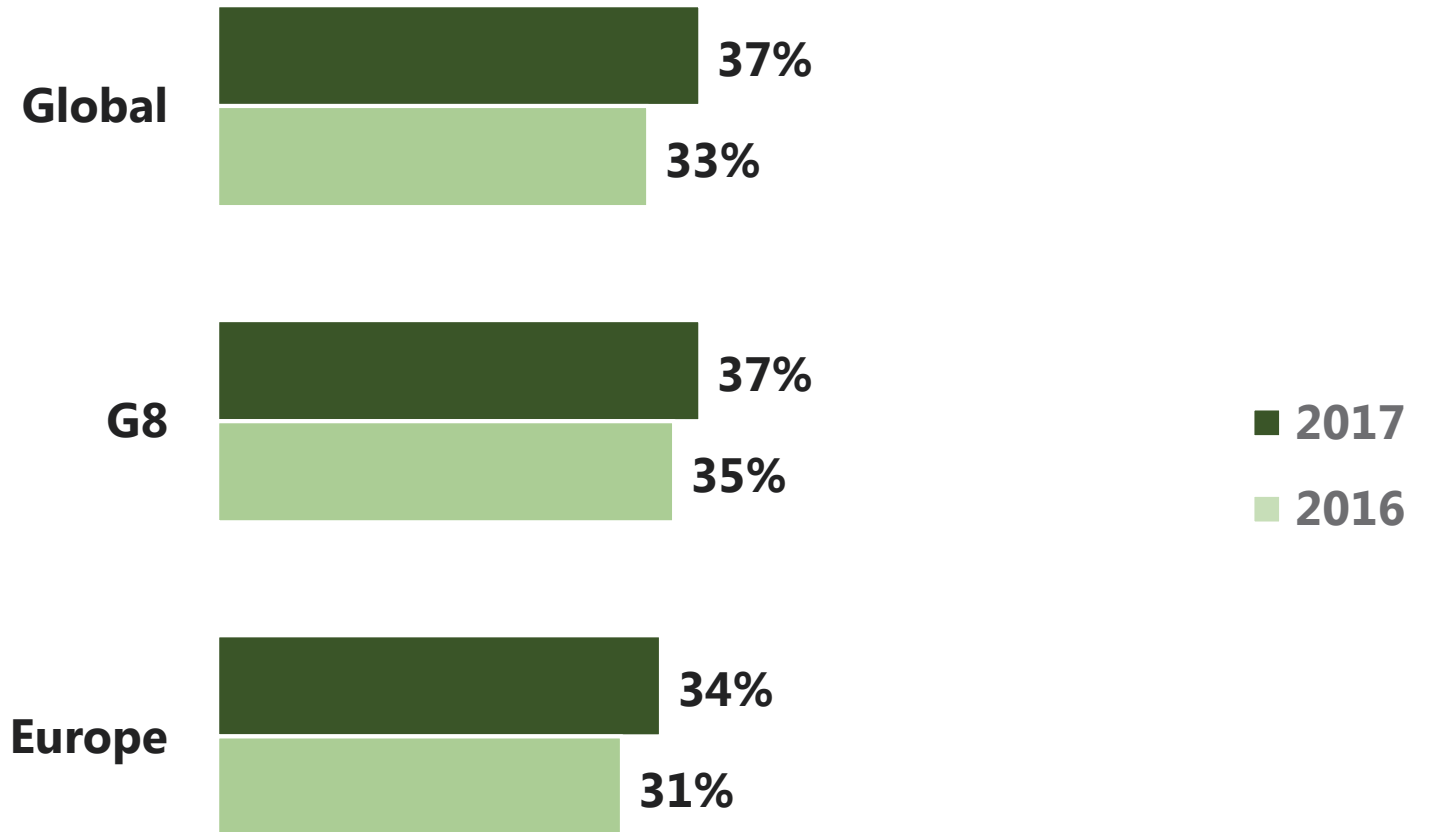
Change vs 2016

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



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

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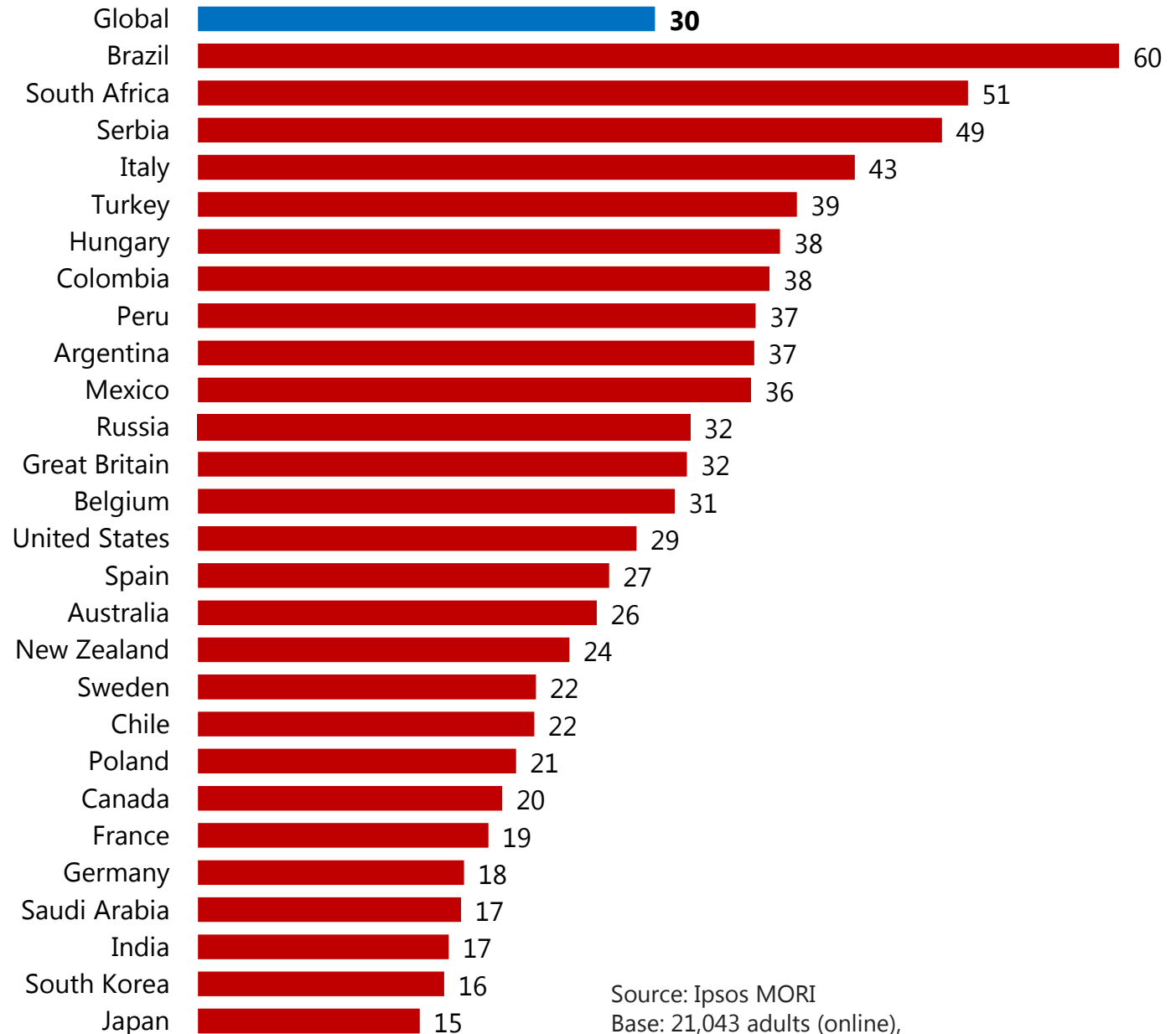
Dissatisfaction

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 dissatisfied



Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

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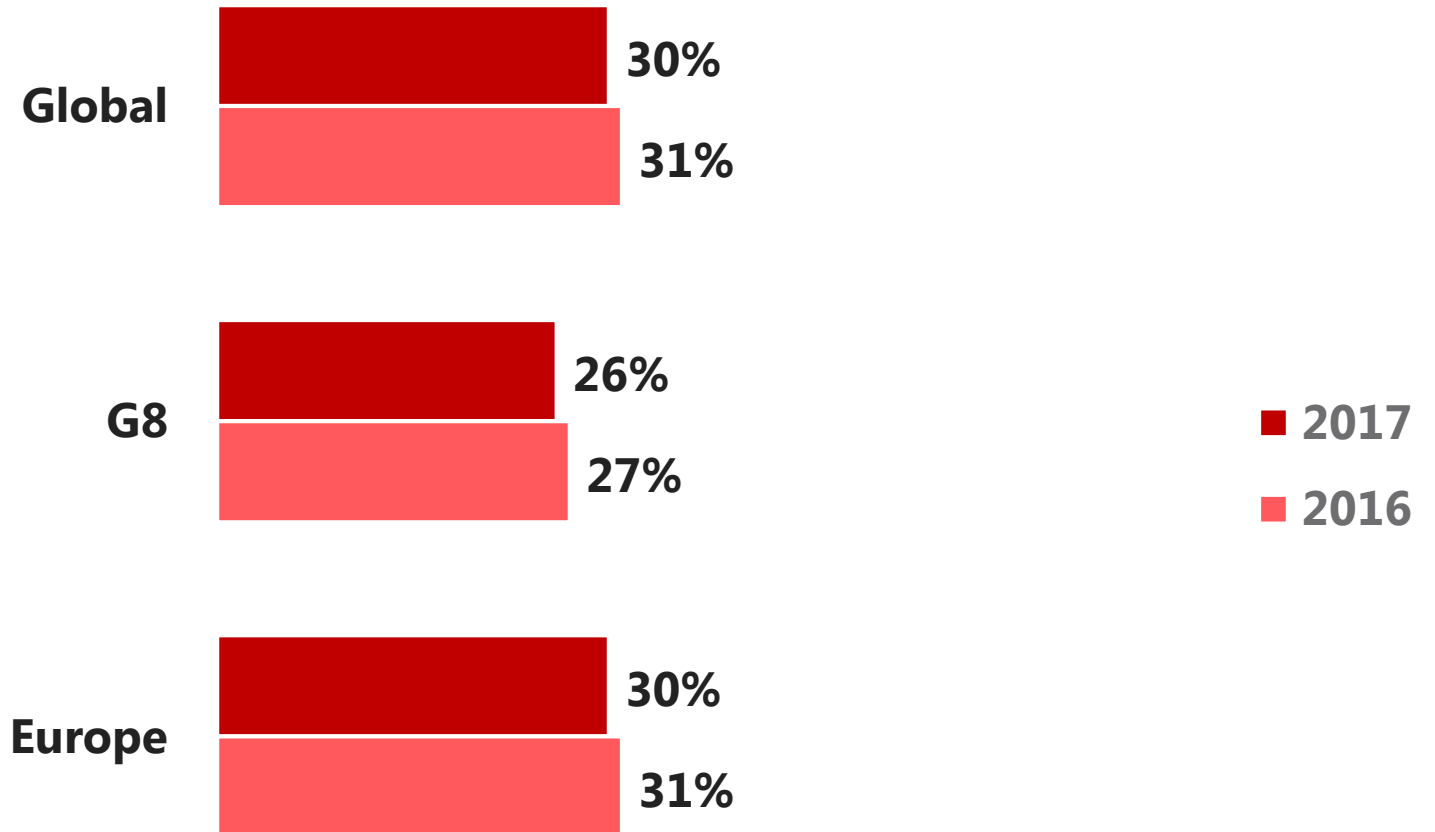
Change vs 2016

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 dissatisfied



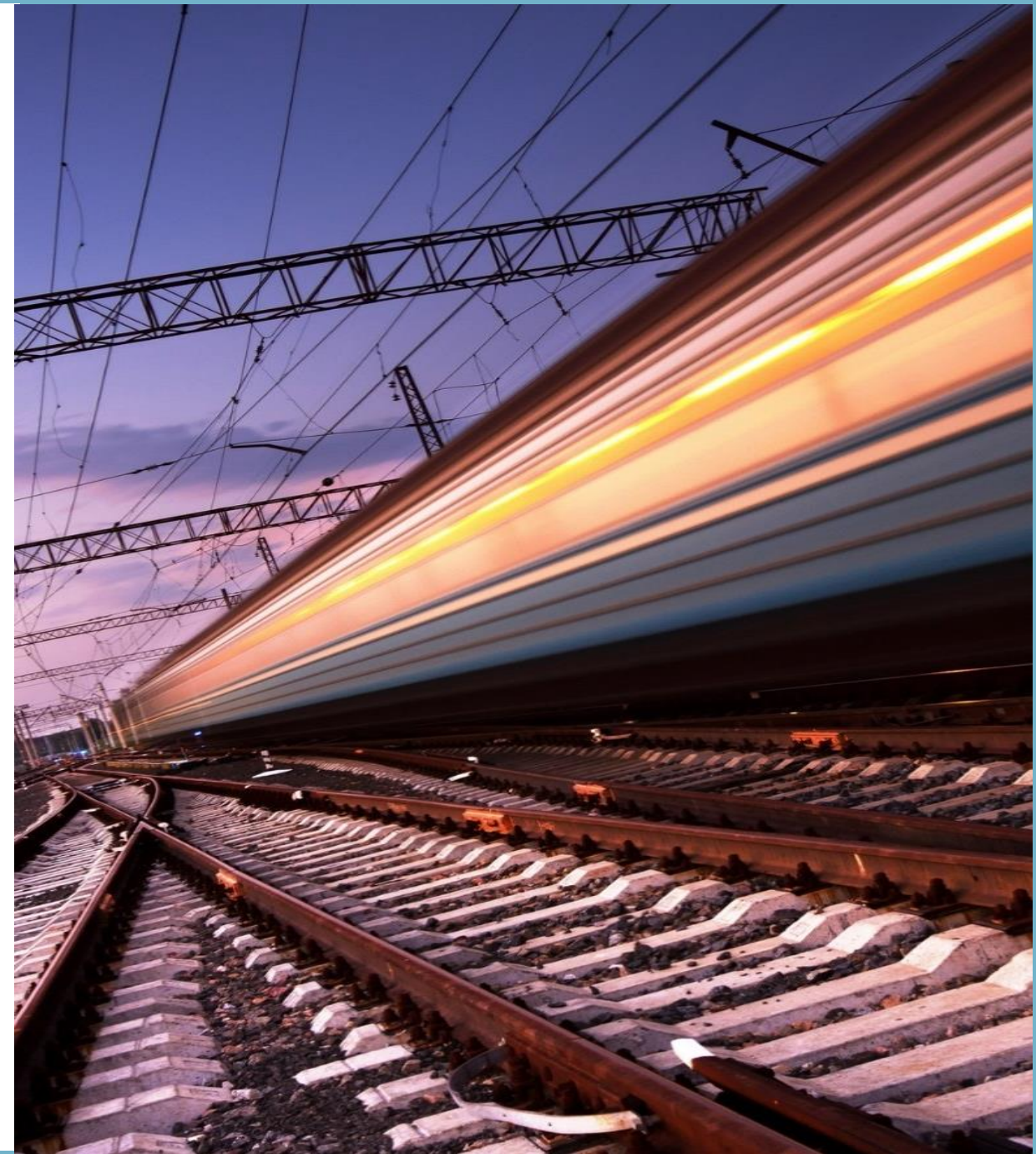
Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

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Ratings of types of infrastructure

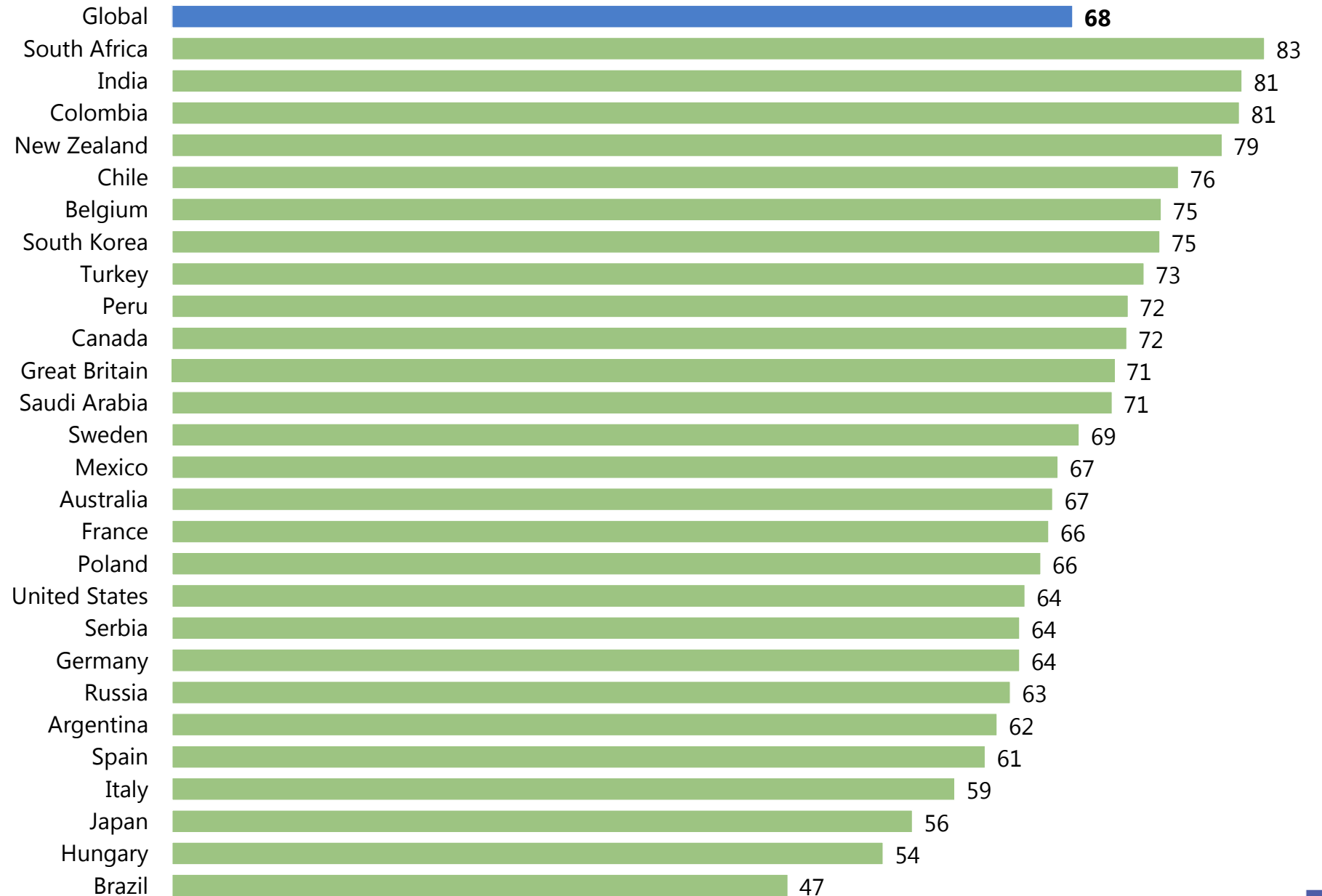


Airports

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

% very/fairly good



Source: Ipsos MORI
Base: 21,043 adults (online), Aug-Sept 2017

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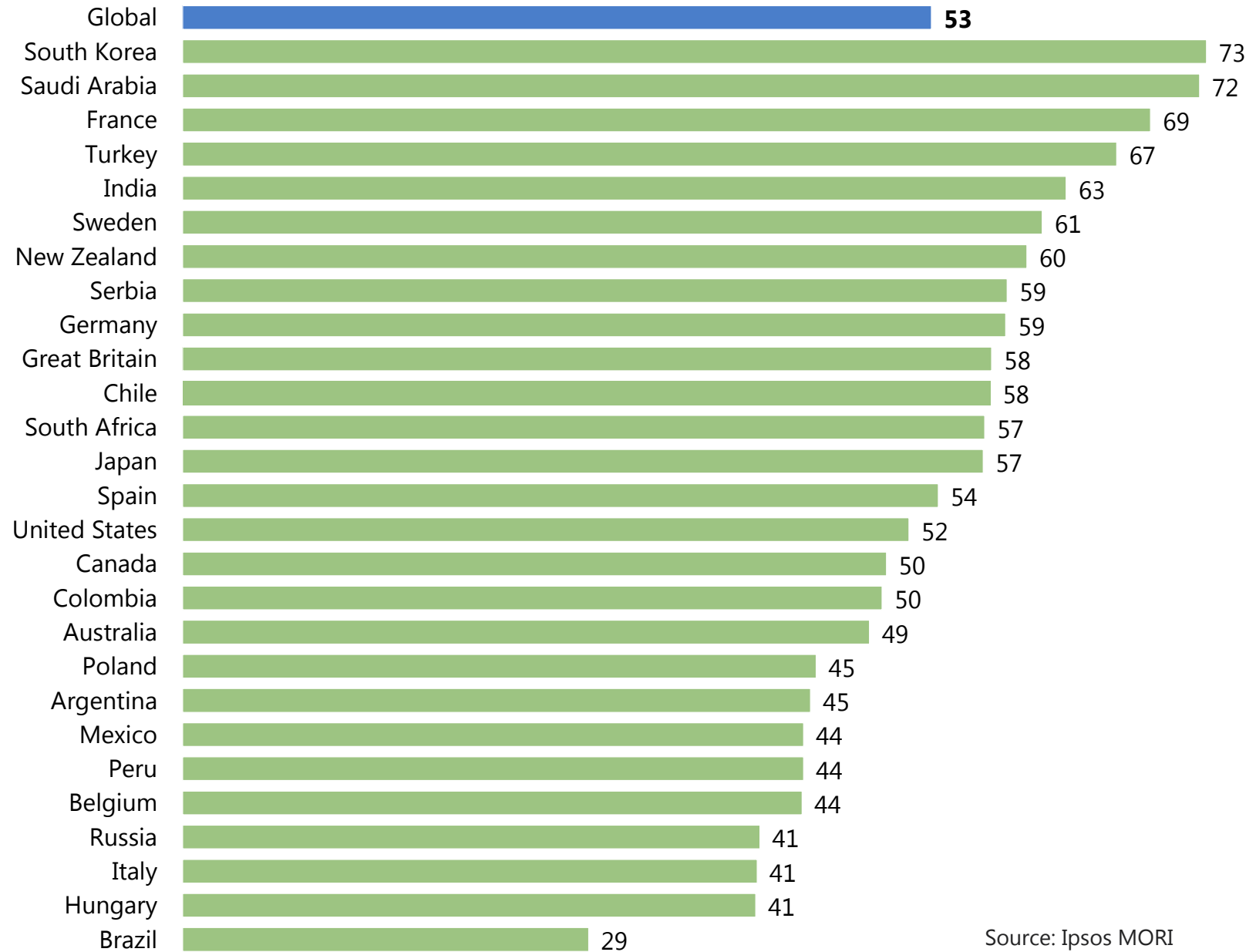


Motorways

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]...

**Motorways/
major roads**

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online) AUG-Sept 2017

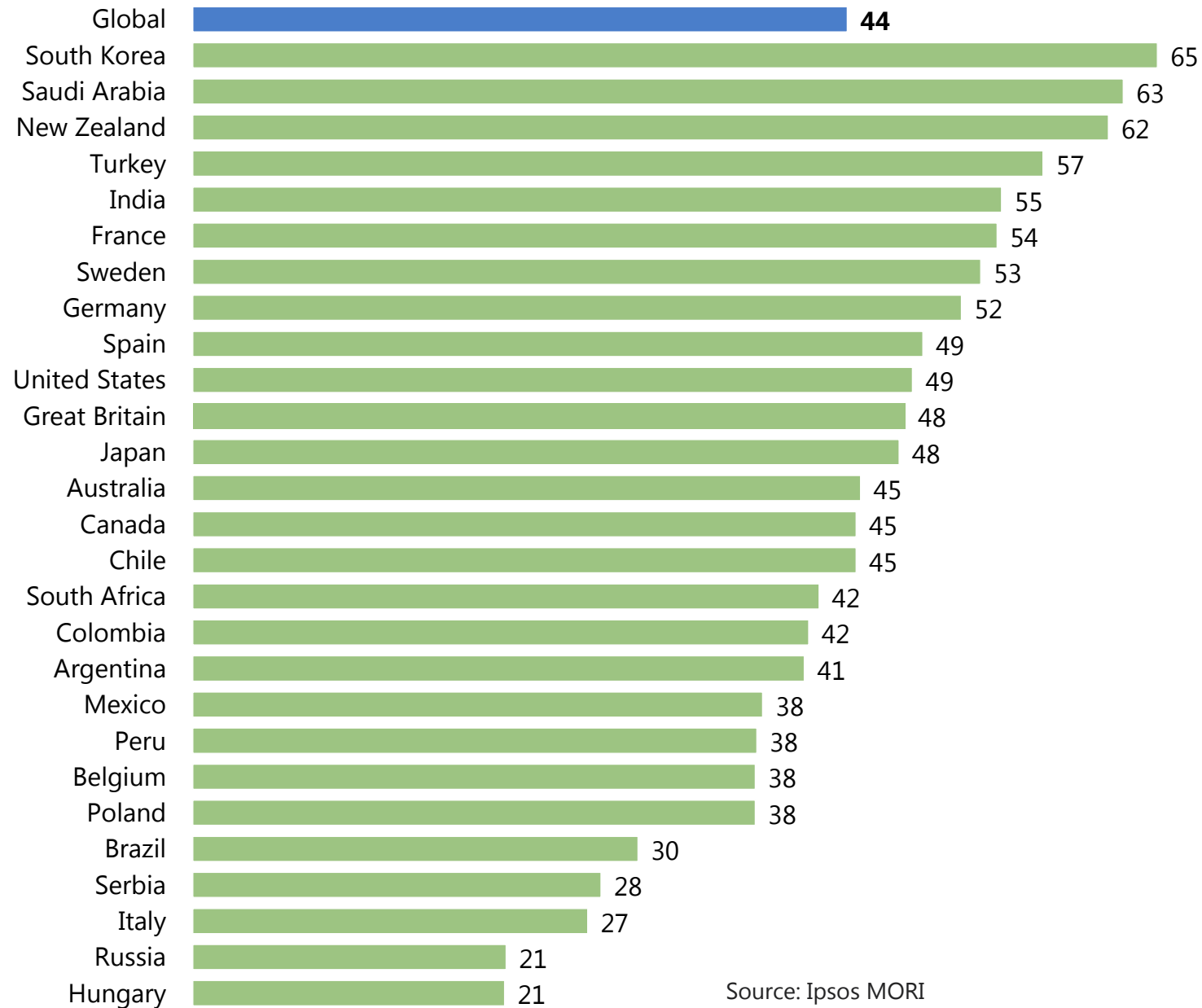


Local roads

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]...

Local road network

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

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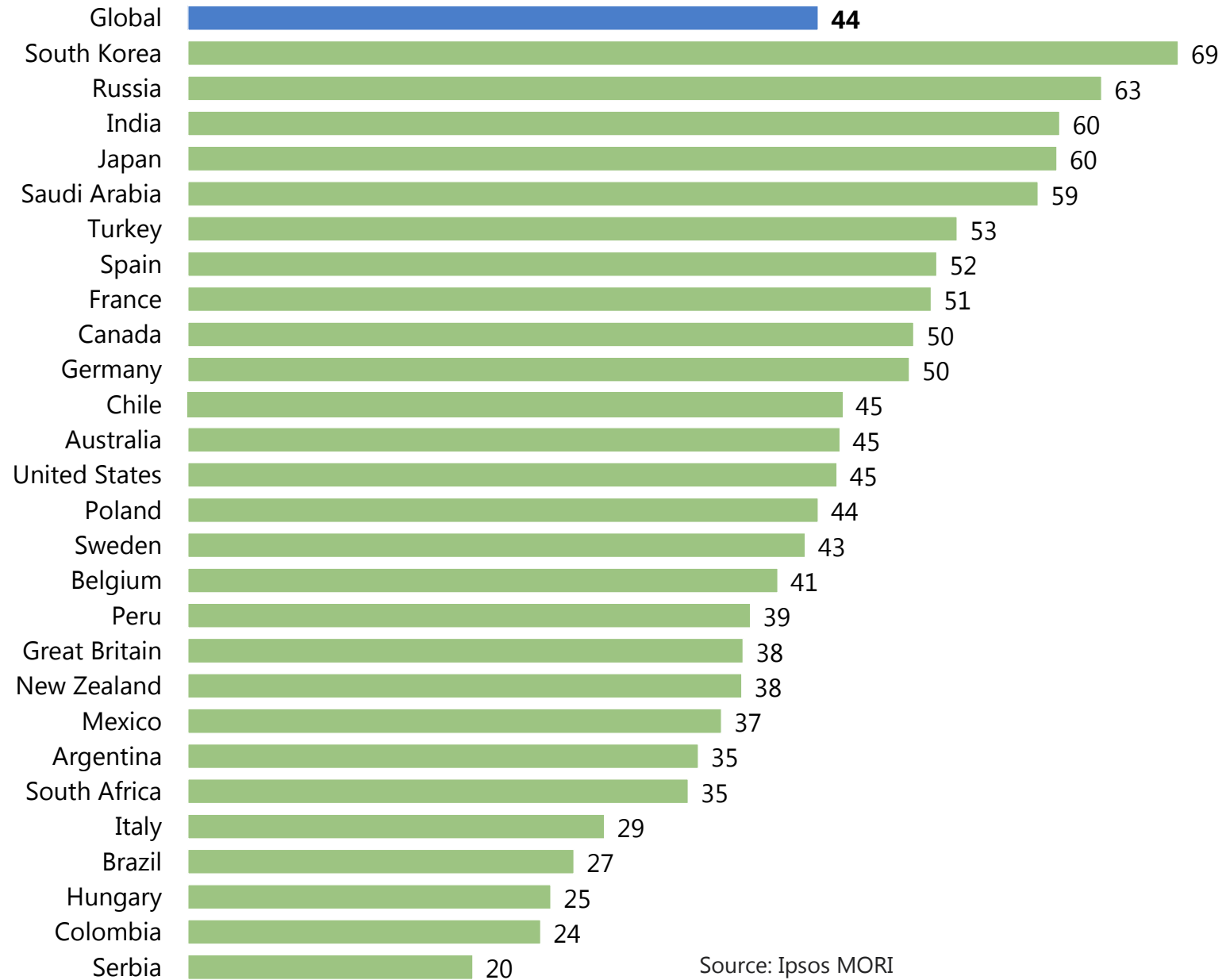


Rail

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]...

Rail infrastructure (track/stations)

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

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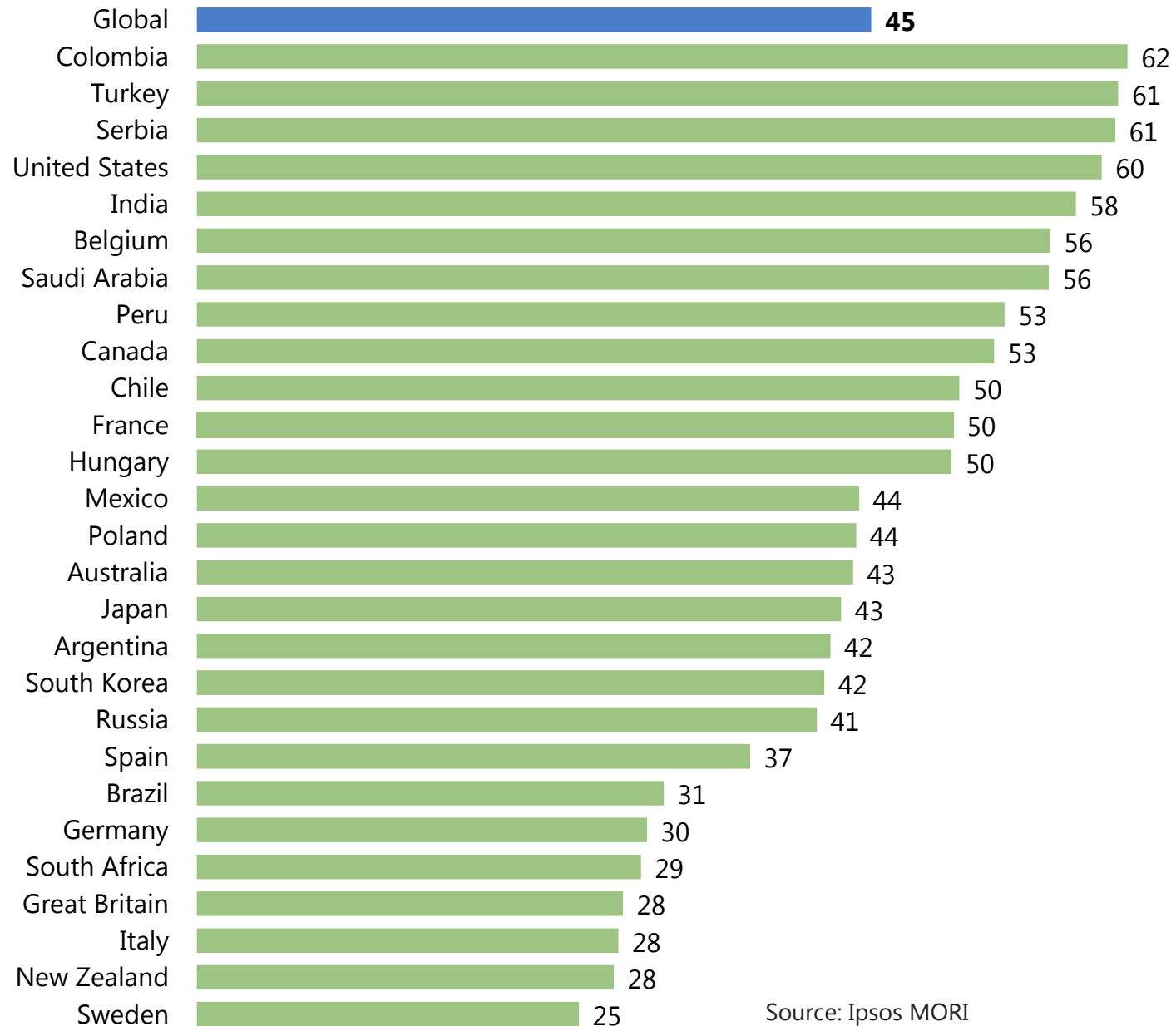


Housing supply

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]...

Housing supply

% very/fairly good



Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

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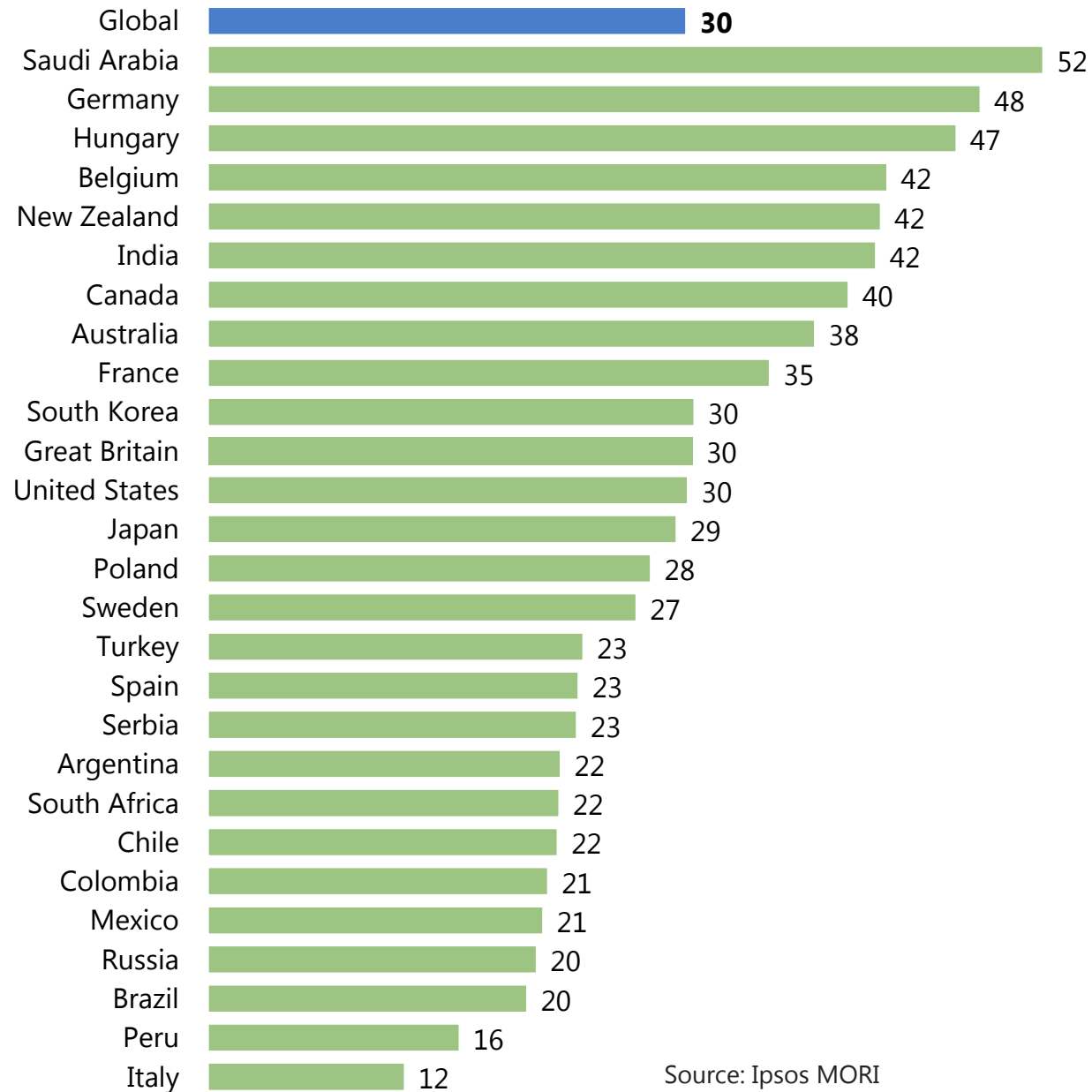
Flood defences

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]...

Flood defences

% very/fairly good



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017 **GAME CHANGERS**



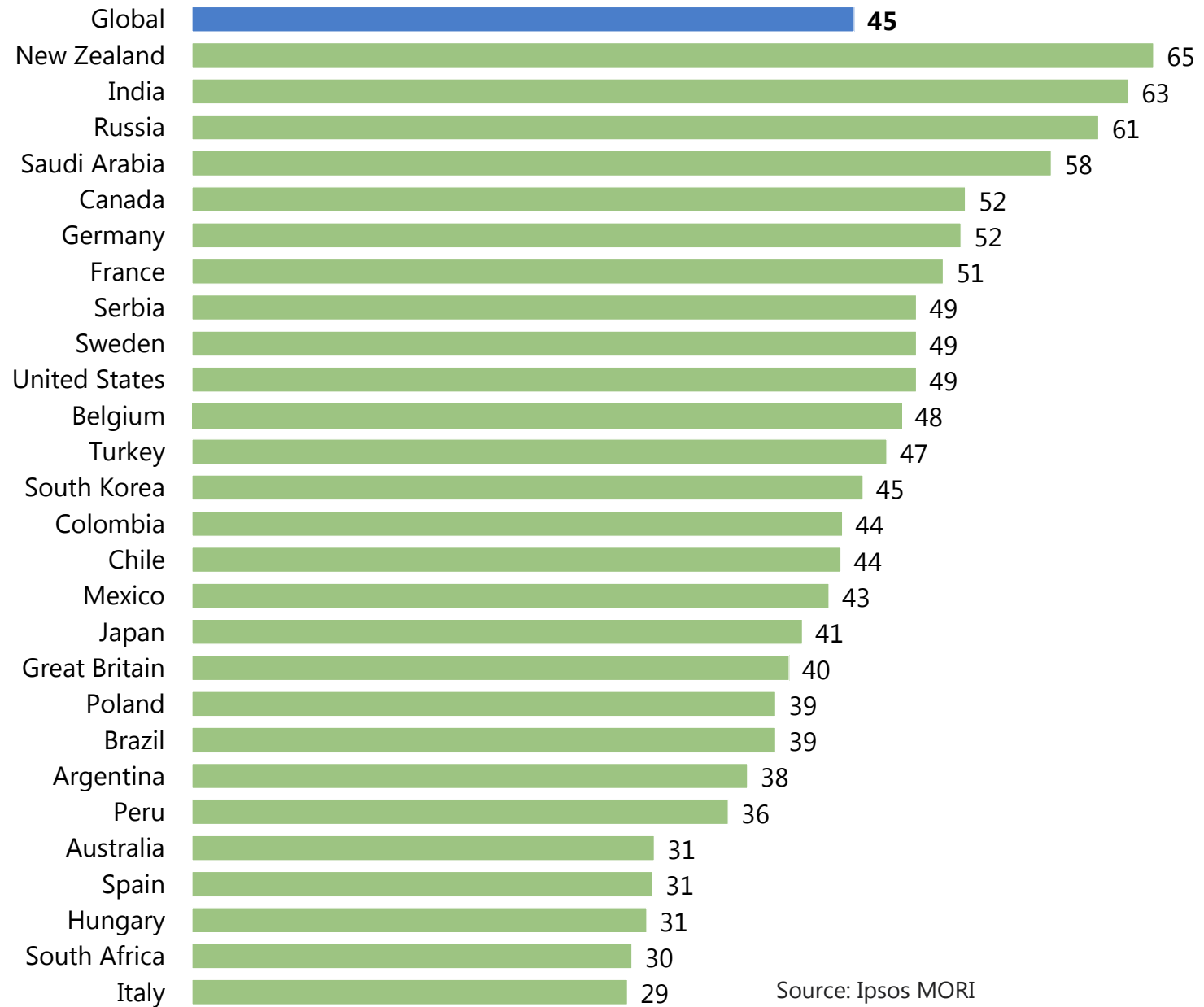
Energy

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

% very/fairly good



Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

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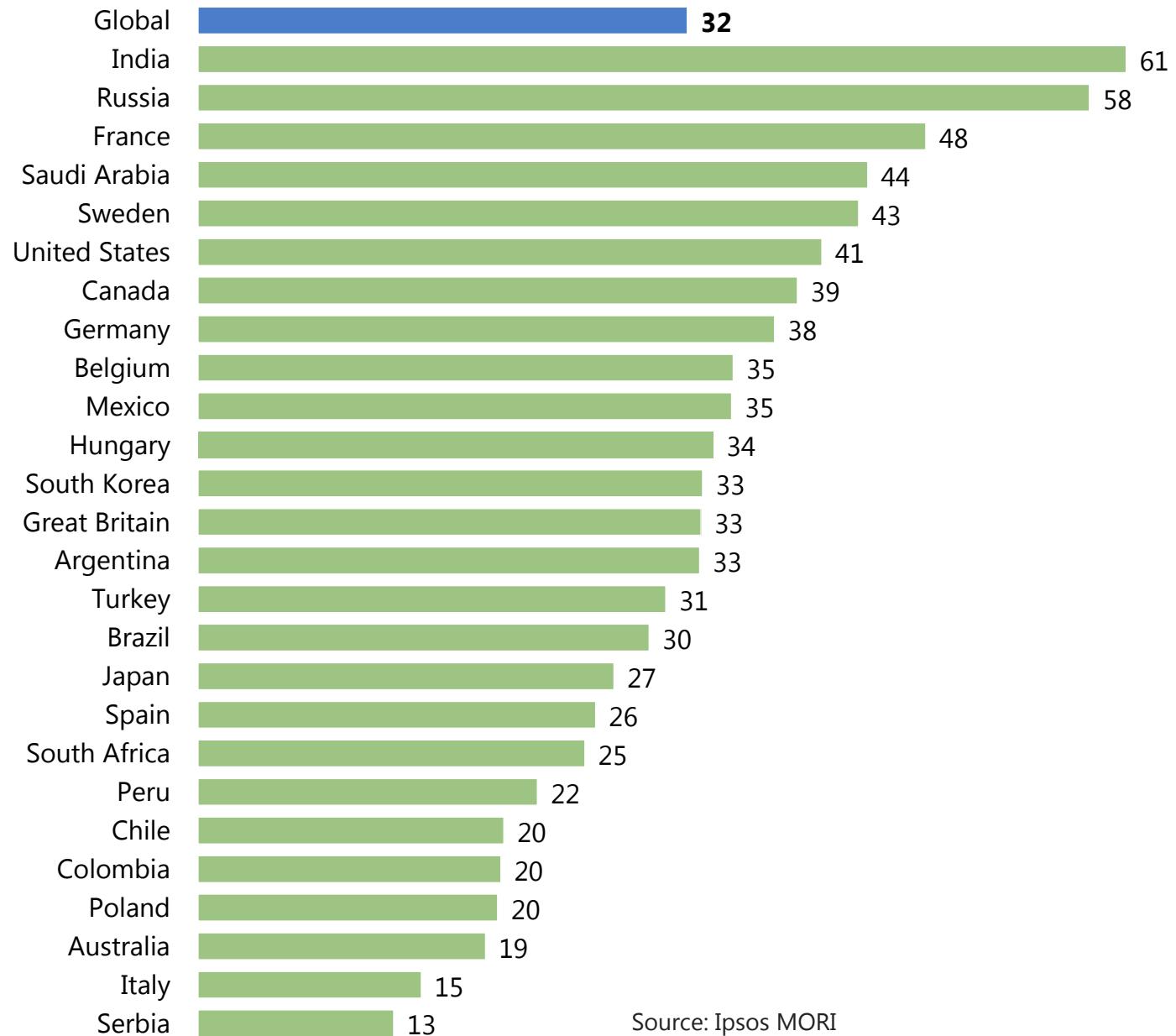
Nuclear

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



Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

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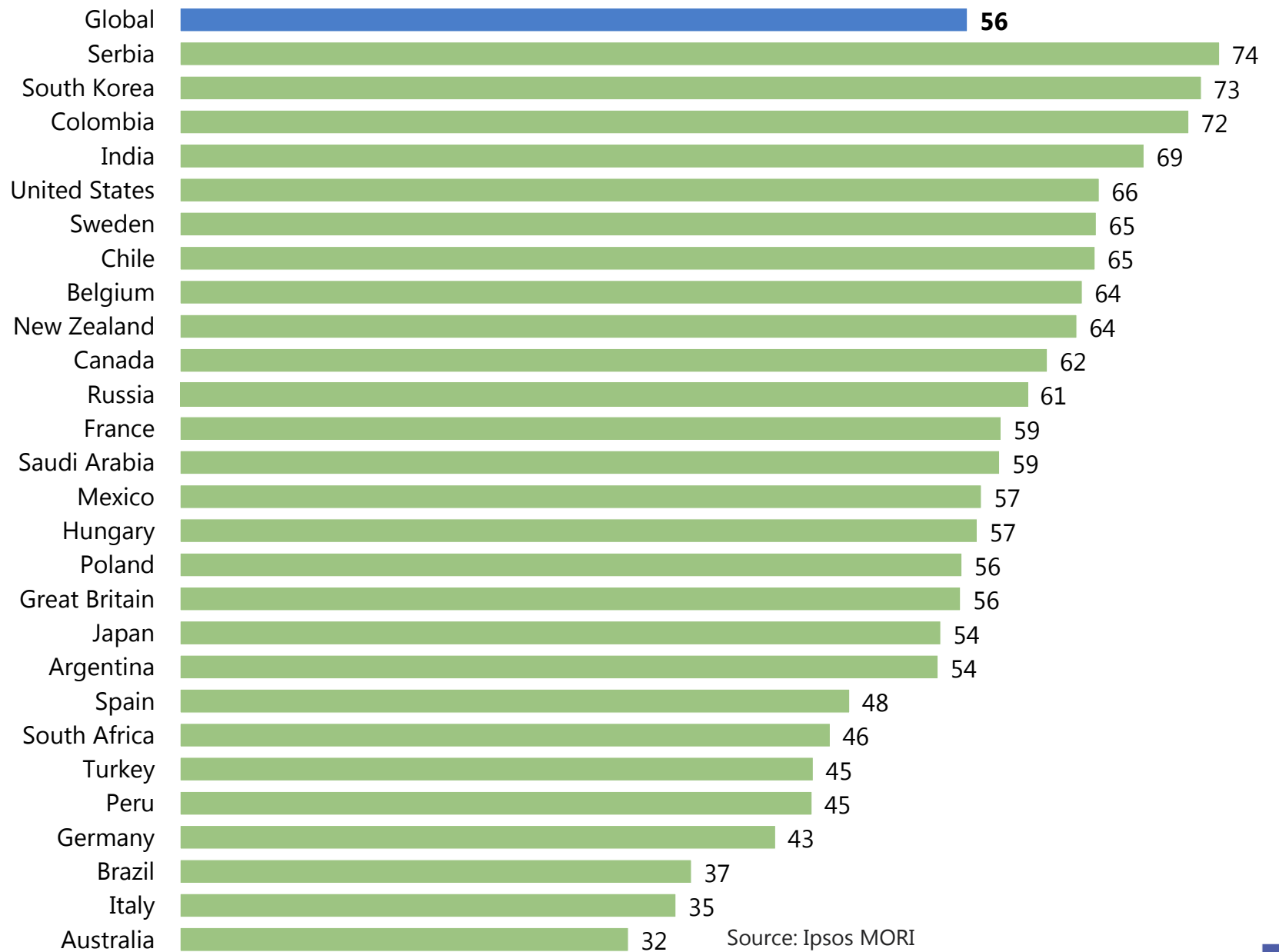


Broadband

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

% very/fairly good



Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

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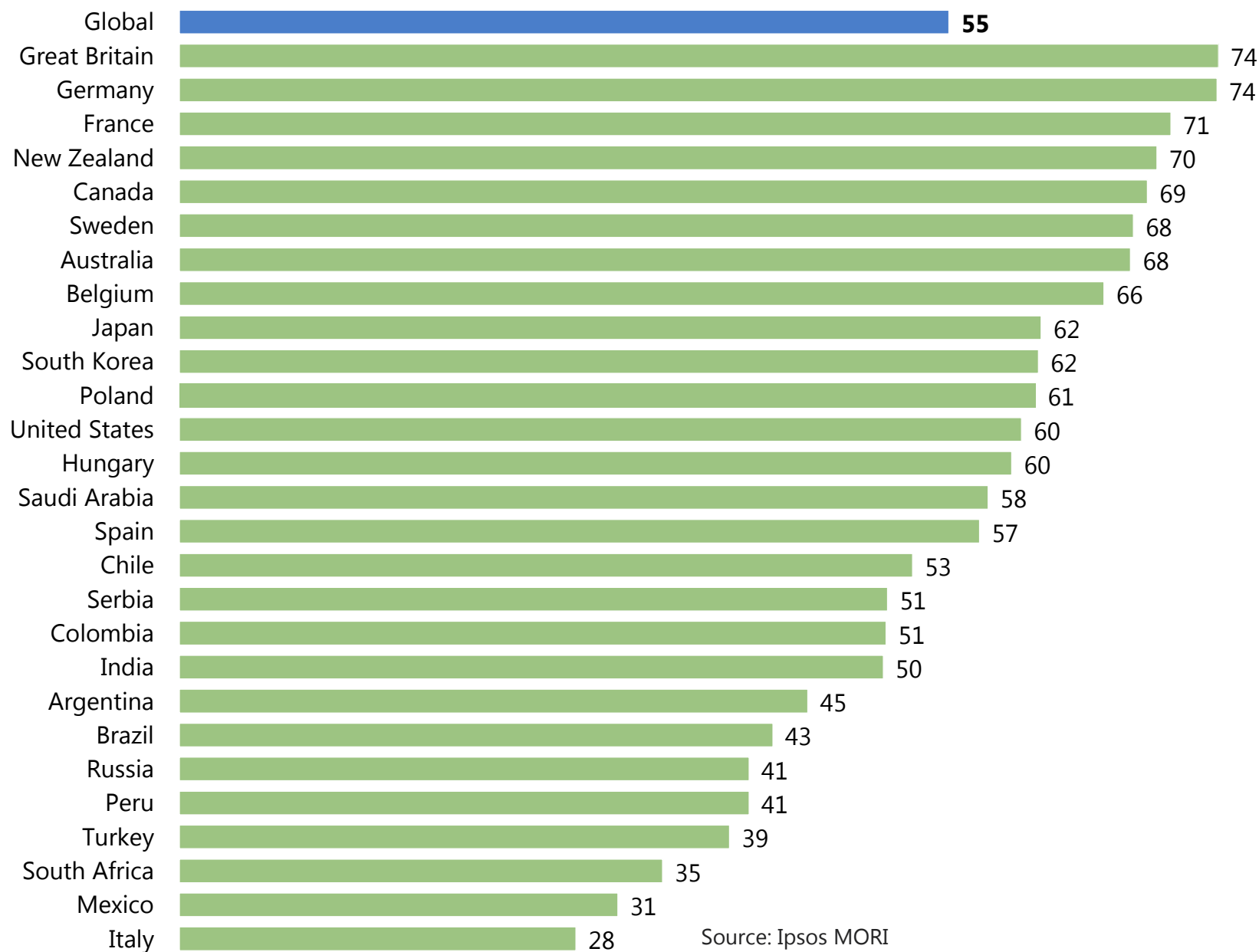
Water supply

& sewerage

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]...

Water supply and sewerage

% very/fairly good



Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

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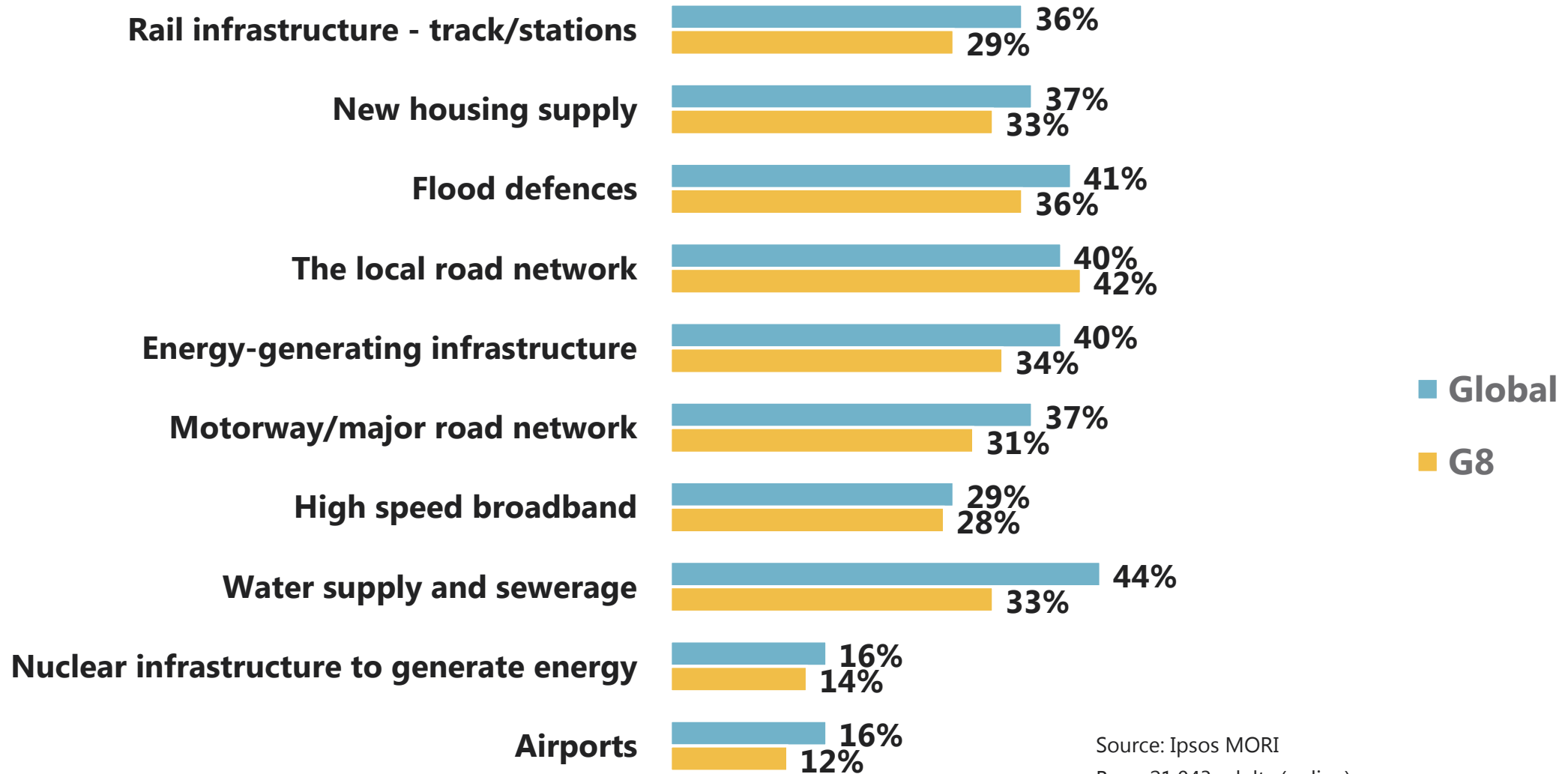


Priorities



Priorities

Q. Which of these types of infrastructure, if any, do you think should be made a priority for investment for...
[COUNTRY]?



Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

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Future factors

Q. Which of the following factors do you think are the most important for... [COUNTRY] to consider when putting together plans for infrastructure in the future? Please rank the following, in order of most to least important.

% ranking as most important

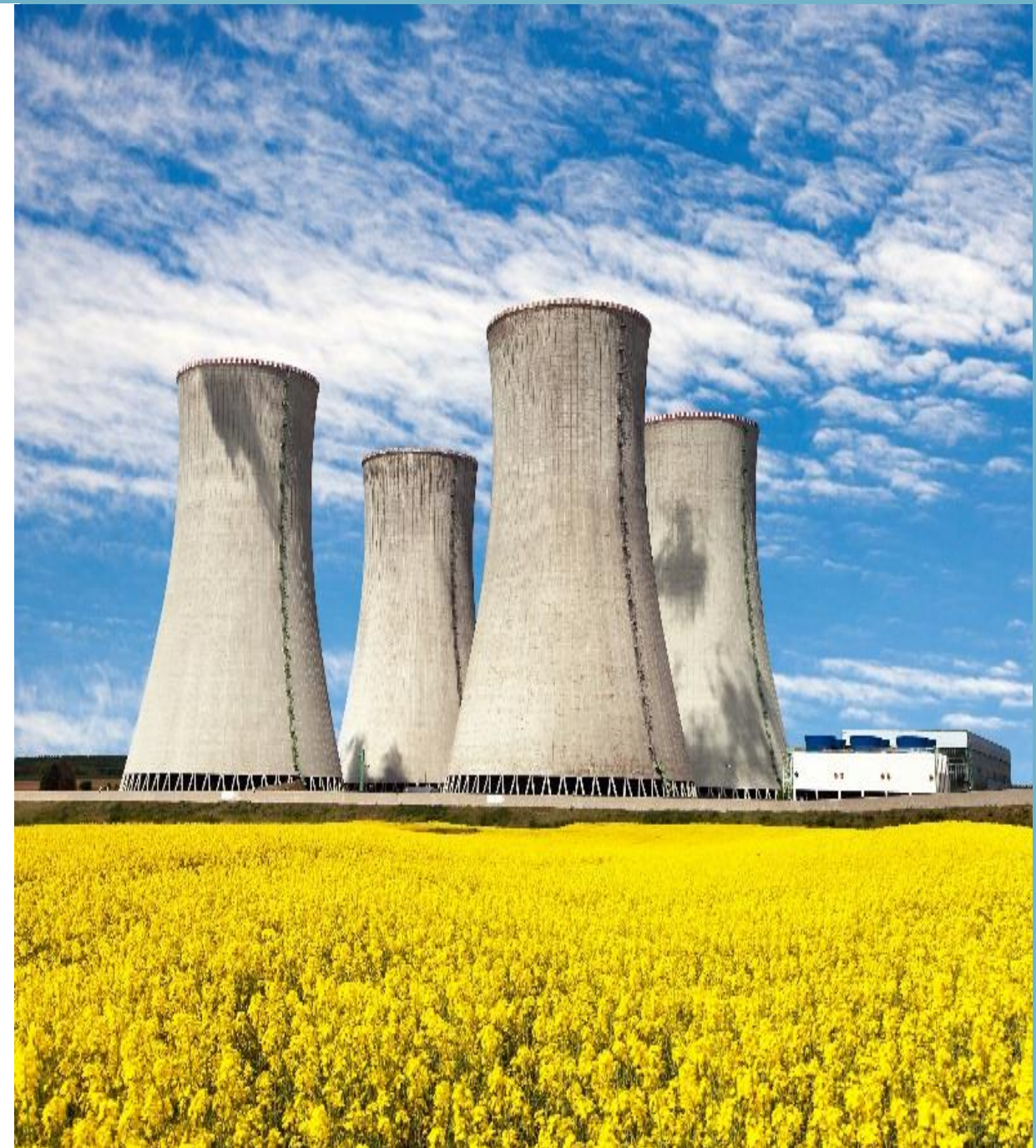
	Global	G8
Disruption: the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved	10	9
Legacy: the infrastructure that we pass on to future generations	12	11
Resilience: how well our infrastructure stands up to challenges today and in the future (e.g. population increases and climate change)	13	15
Environment: the impact our infrastructure has on our environment	18	19
Investment: paying for the costs of improving and building new infrastructure now, to avoid having to pay more later	14	14
Quality: making sure that infrastructure is as good as it possibly can be (e.g. in terms of speed or convenience of services)	18	18

Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017 **GAME CHANGERS**



Attitudes

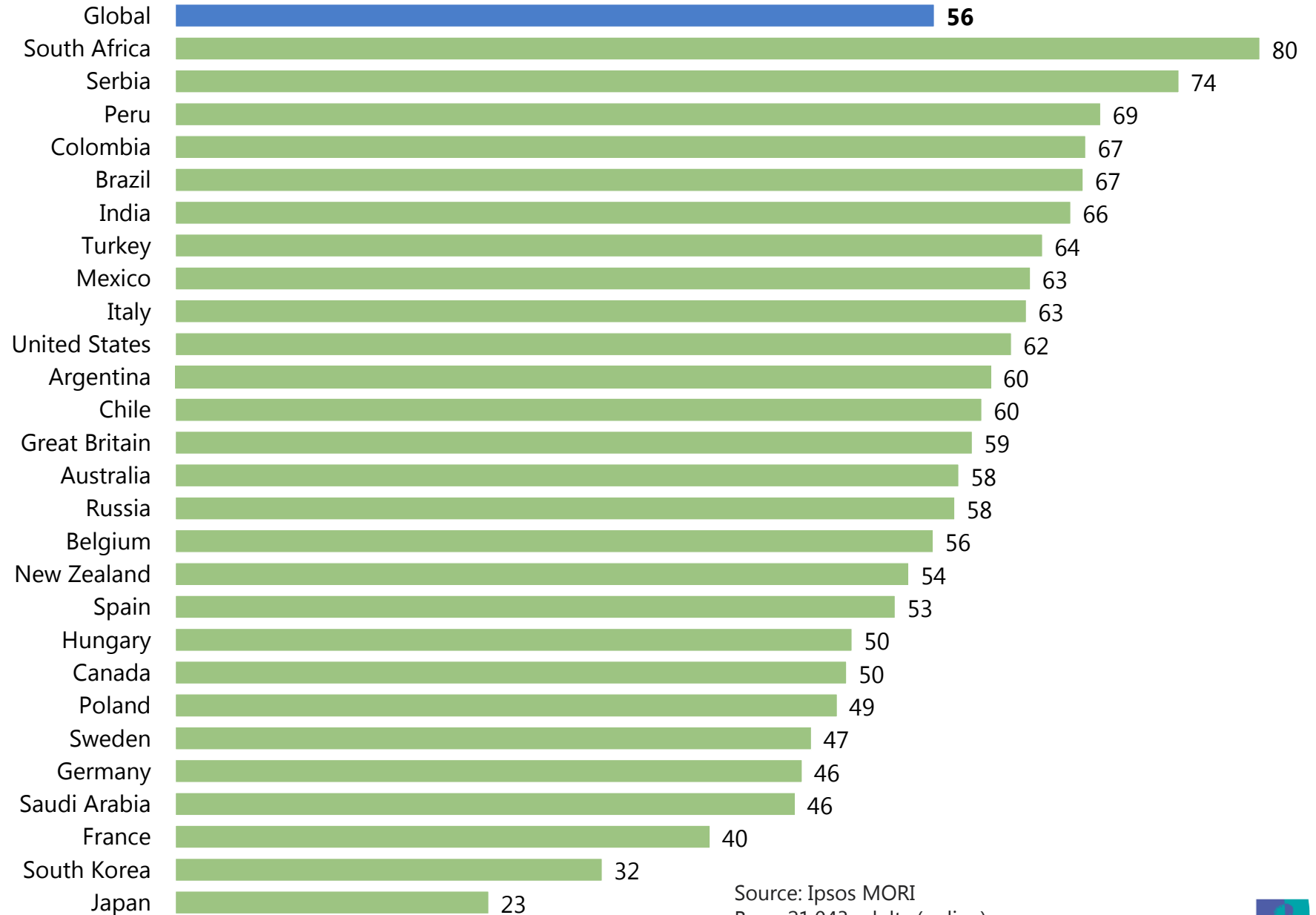


Doing enough?

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

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

% strongly/tend to agree



Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

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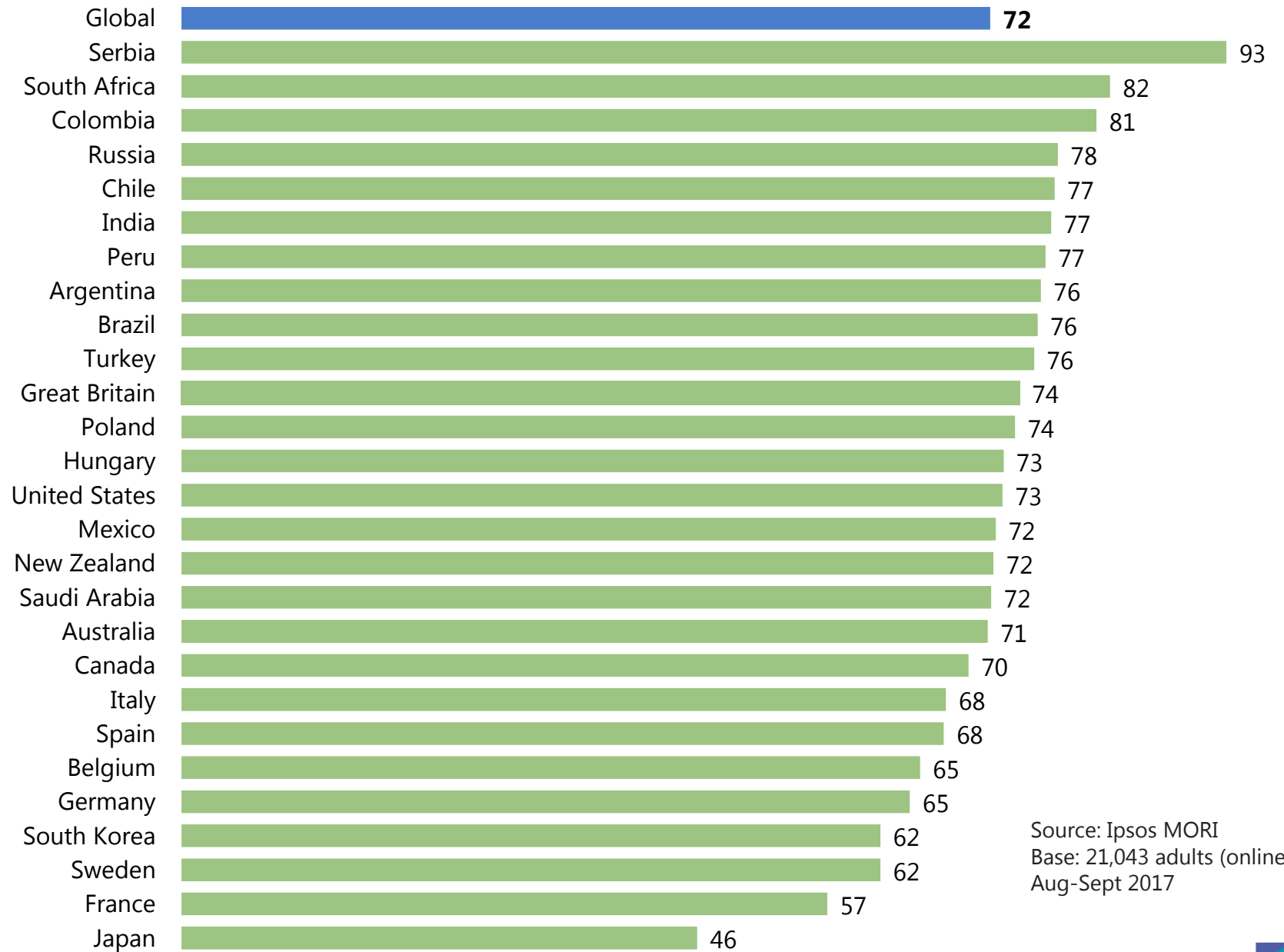


Investment vital

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

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

% strongly/tend to agree



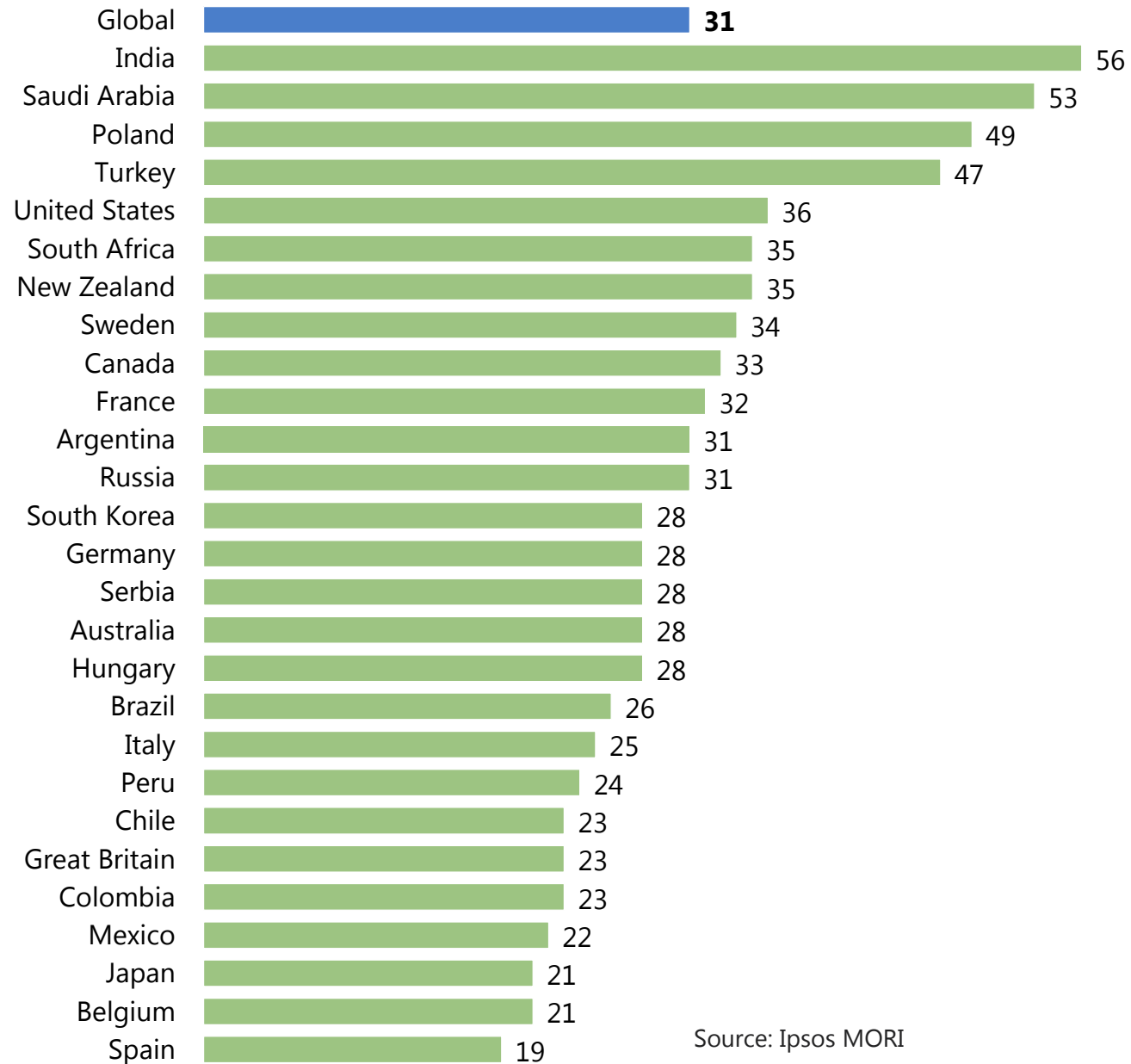
Source: Ipsos MORI
Base: 21,043 adults (online),
Aug-Sept 2017

Fair share

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

My local area gets its fair share of [COUNTRY]'s investment in infrastructure

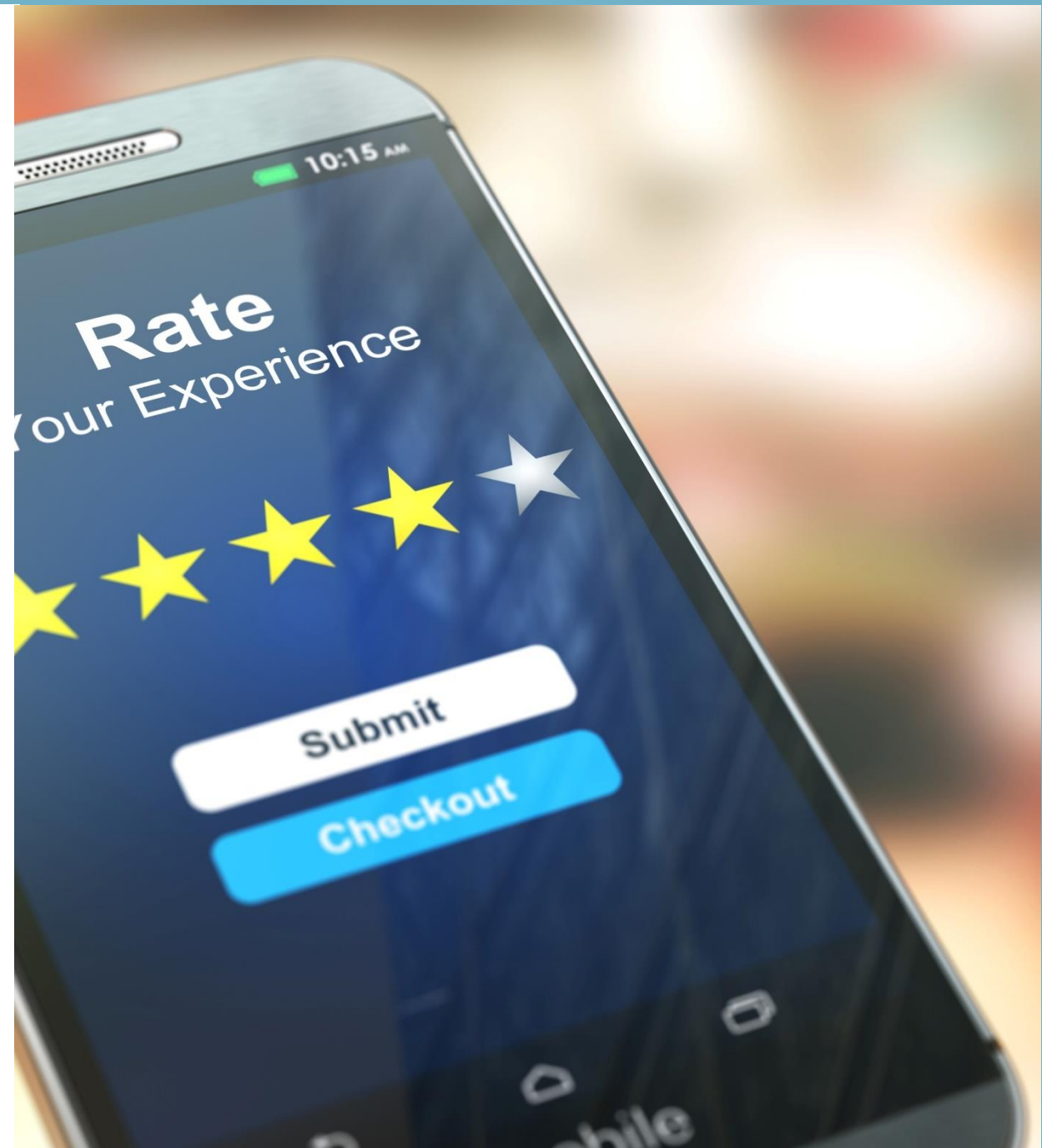
% strongly/tend to agree



Source: Ipsos MORI

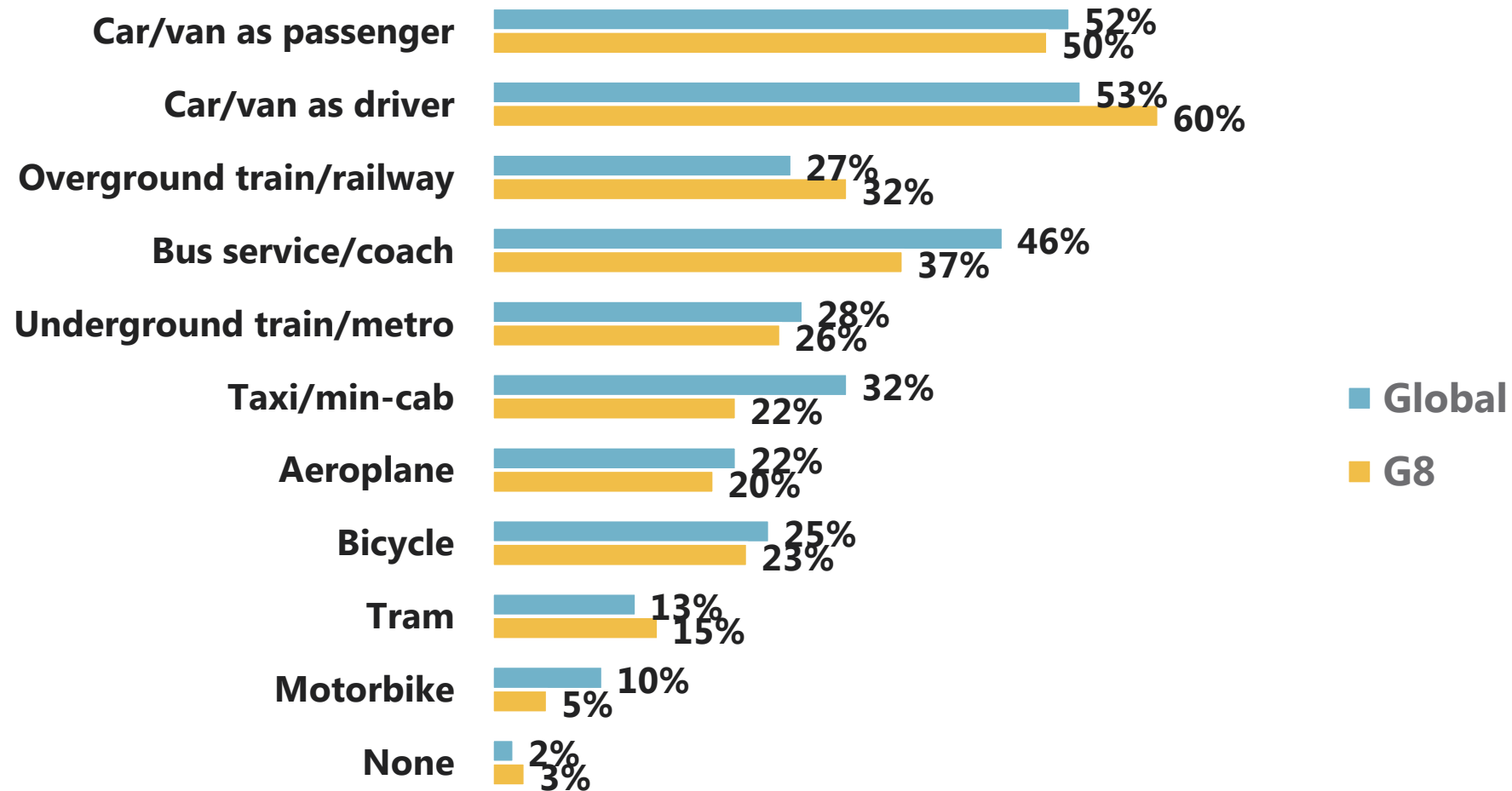
Base: 21,043 adults (online), Aug-Sept 2017 **GAME CHANGERS**

Experience



Usage

Q. Which of these types of transport have you used to make a journey in the past six months?



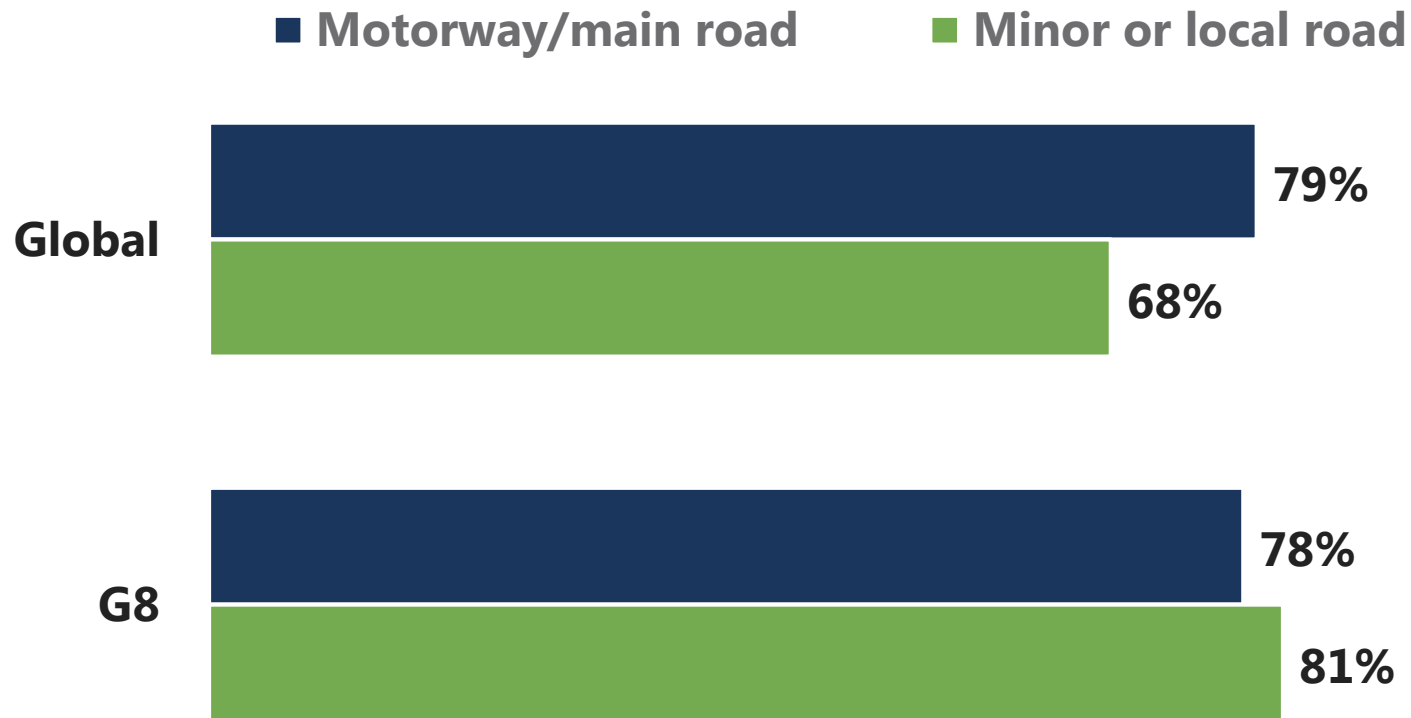
Source: Ipsos MORI

Base: 21,043 adults (online), Aug-Sept 2017

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Types of road used

Q. Thinking about the journeys you have made by road in the past six months, have they been on...



Source: Ipsos MORI

Base: All answering among 19,485 adults (online), 26 Aug-9 Sept

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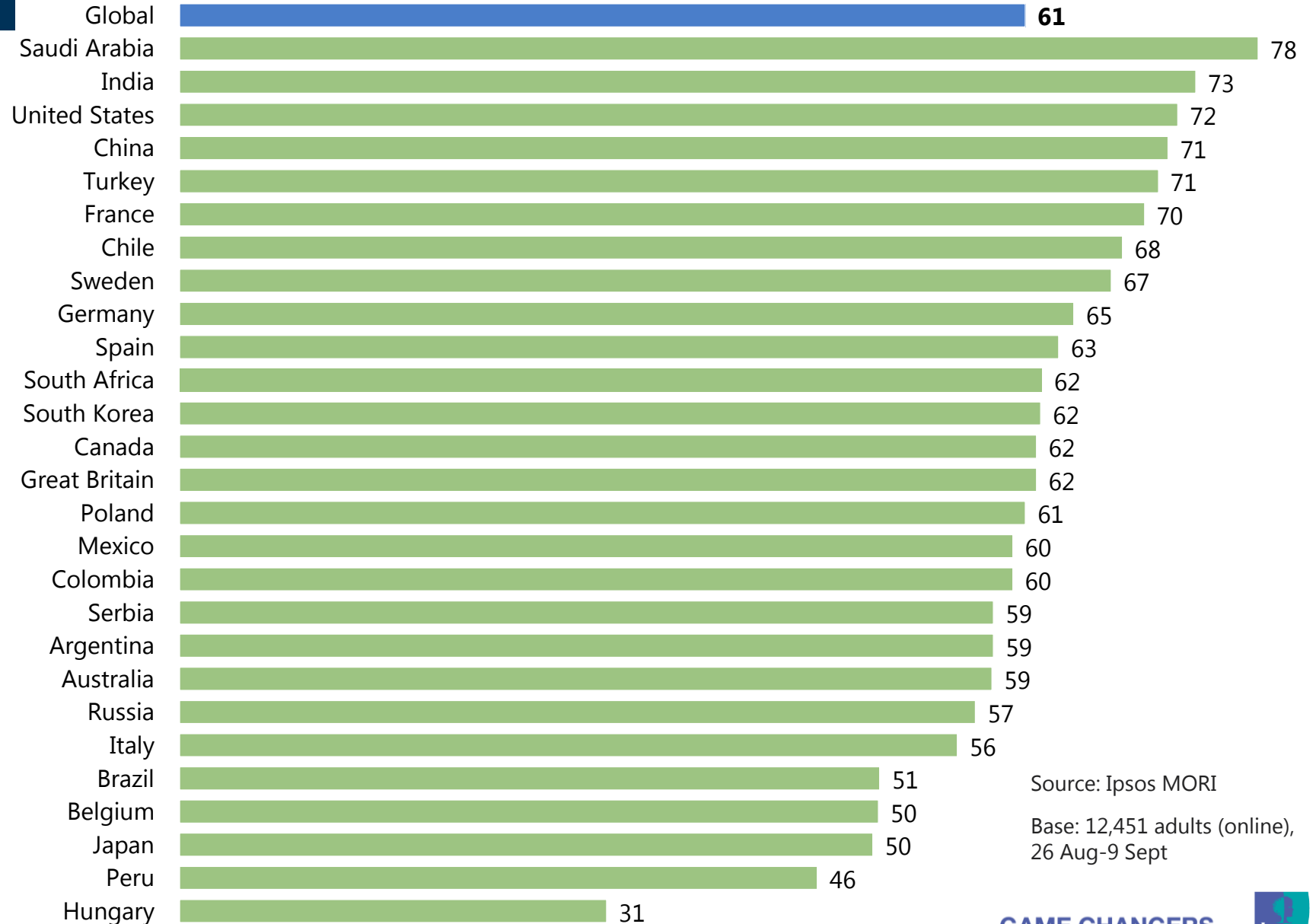


Satisfaction – car

Q. Thinking about the last time you made a journey by.... how satisfied or dissatisfied were you with your experience of that journey?

Car/van as driver

% very/fairly satisfied



Source: Ipsos MORI

Base: 12,451 adults (online),
26 Aug-9 Sept

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Satisfaction – car

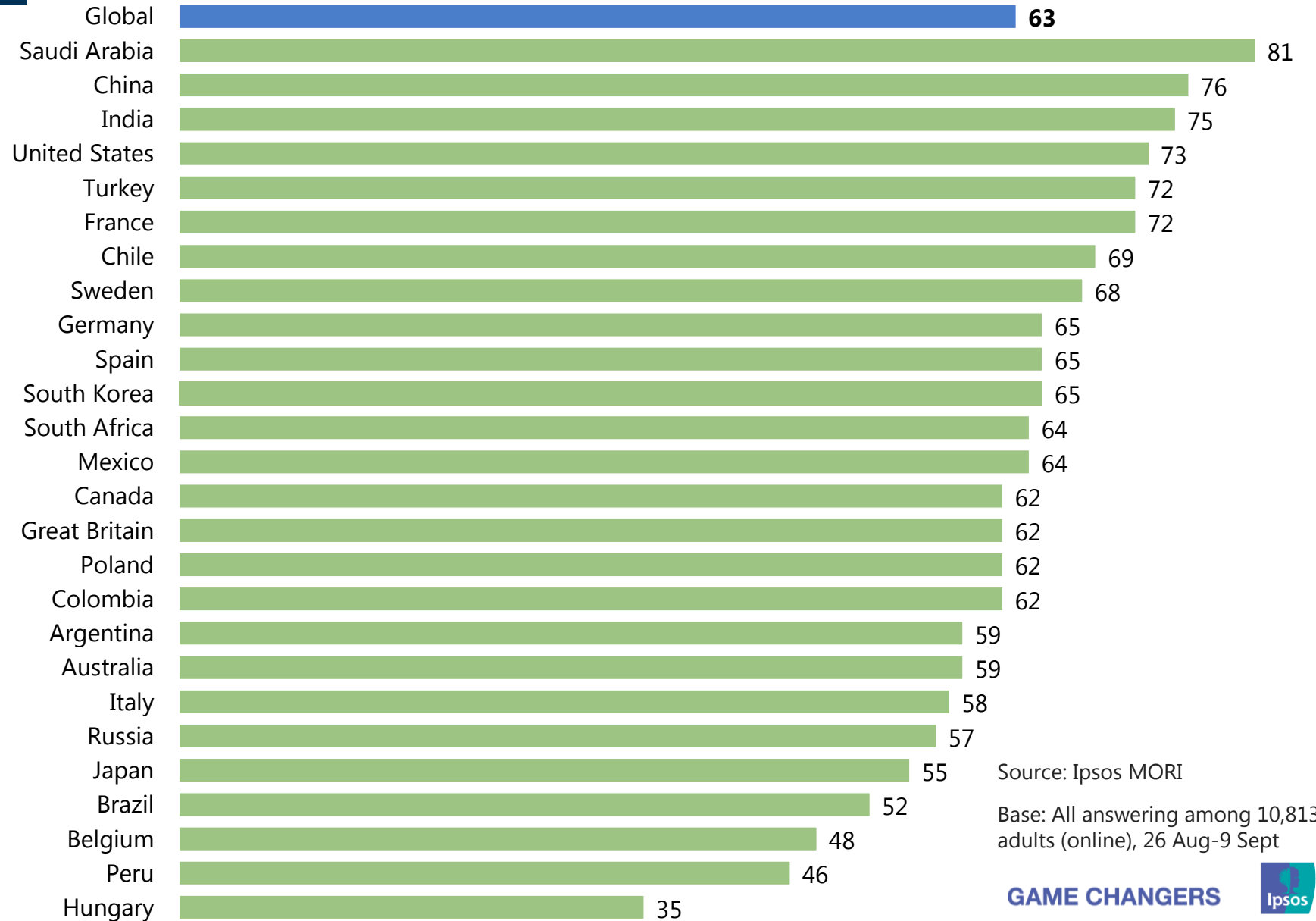
Among motorway users*

Q. Thinking about the last time you made a journey by ..., how satisfied or dissatisfied were you with your experience of that journey?

Car/van as driver*

% very/fairly satisfied

* N.B. Respondents were not asked specifically about their last driving journey on a motorway



Source: Ipsos MORI

Base: All answering among 10,813 adults (online), 26 Aug-9 Sept

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Satisfaction – car

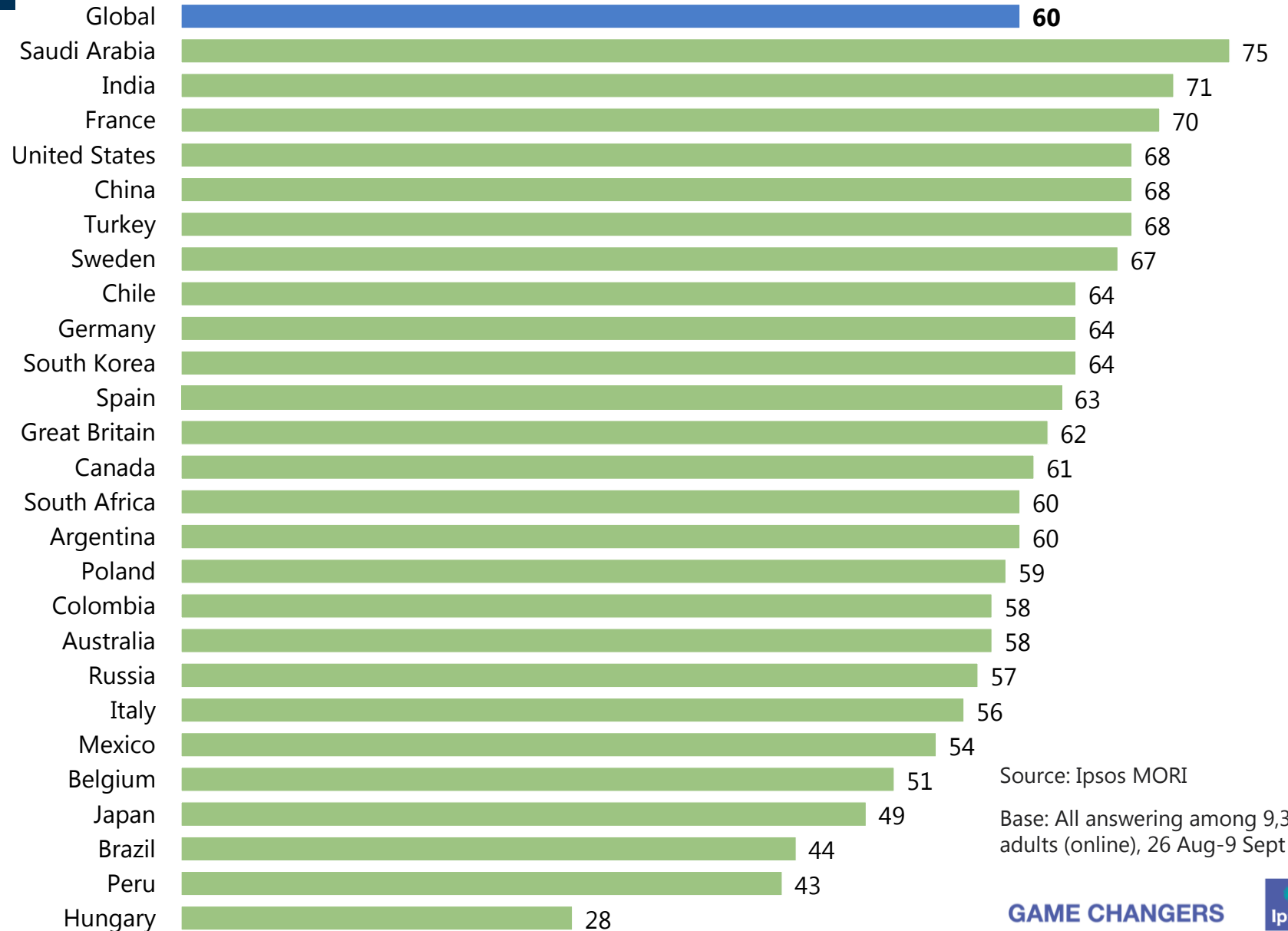
Among drivers on other roads*

Q. Thinking about the last time you made a journey by ..., how satisfied or dissatisfied were you with your experience of that journey?

Car/van as driver*

% very/fairly satisfied

* N.B. Respondents were not asked specifically about their last driving journey on a local/other road



Source: Ipsos MORI

Base: All answering among 9,390 adults (online), 26 Aug-9 Sept

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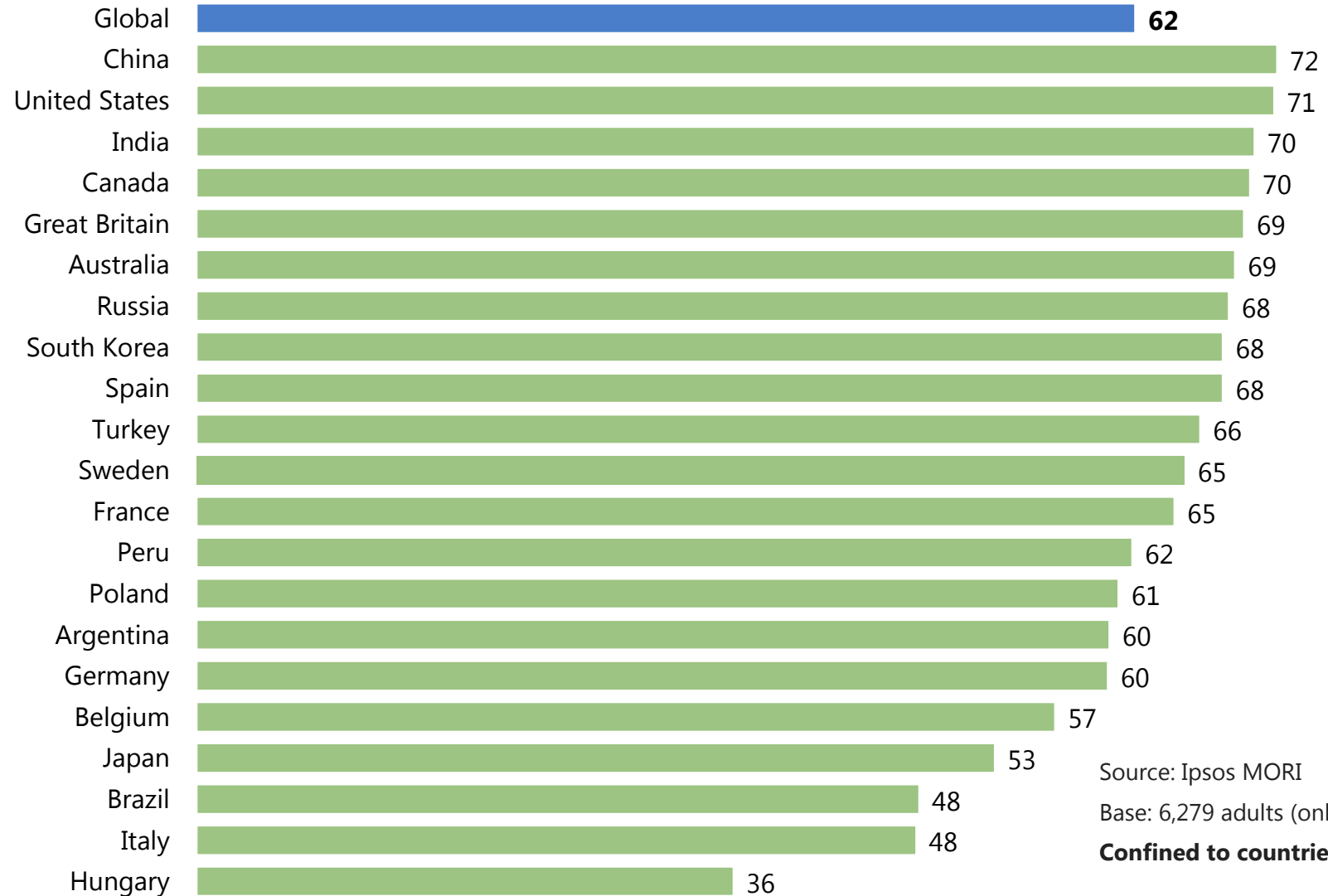


Satisfaction – overground rail

Q. Thinking about the last time you made a journey by.... how satisfied or dissatisfied were you with your experience of that journey?

Overground train/railway

% very/fairly satisfied



Source: Ipsos MORI

Base: 6,279 adults (online), 26 Aug-9 Sept

Confined to countries >n=100

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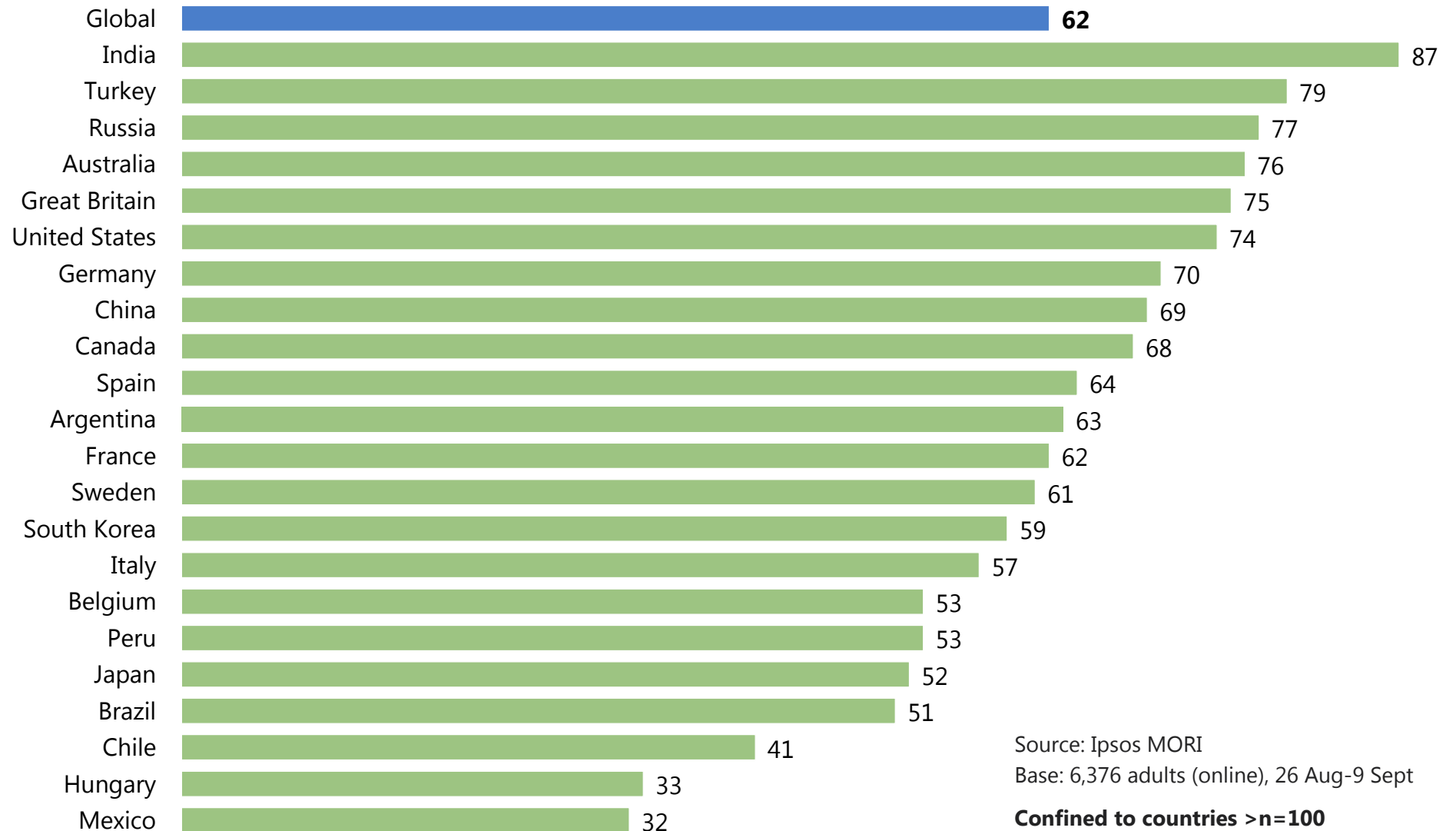


Satisfaction – underground rail

Q. Thinking about the last time you made a journey by.... how satisfied or dissatisfied were you with your experience of that journey?

Underground train/metro

% very/fairly satisfied



Source: Ipsos MORI

Base: 6,376 adults (online), 26 Aug-9 Sept

Confined to countries >n=100

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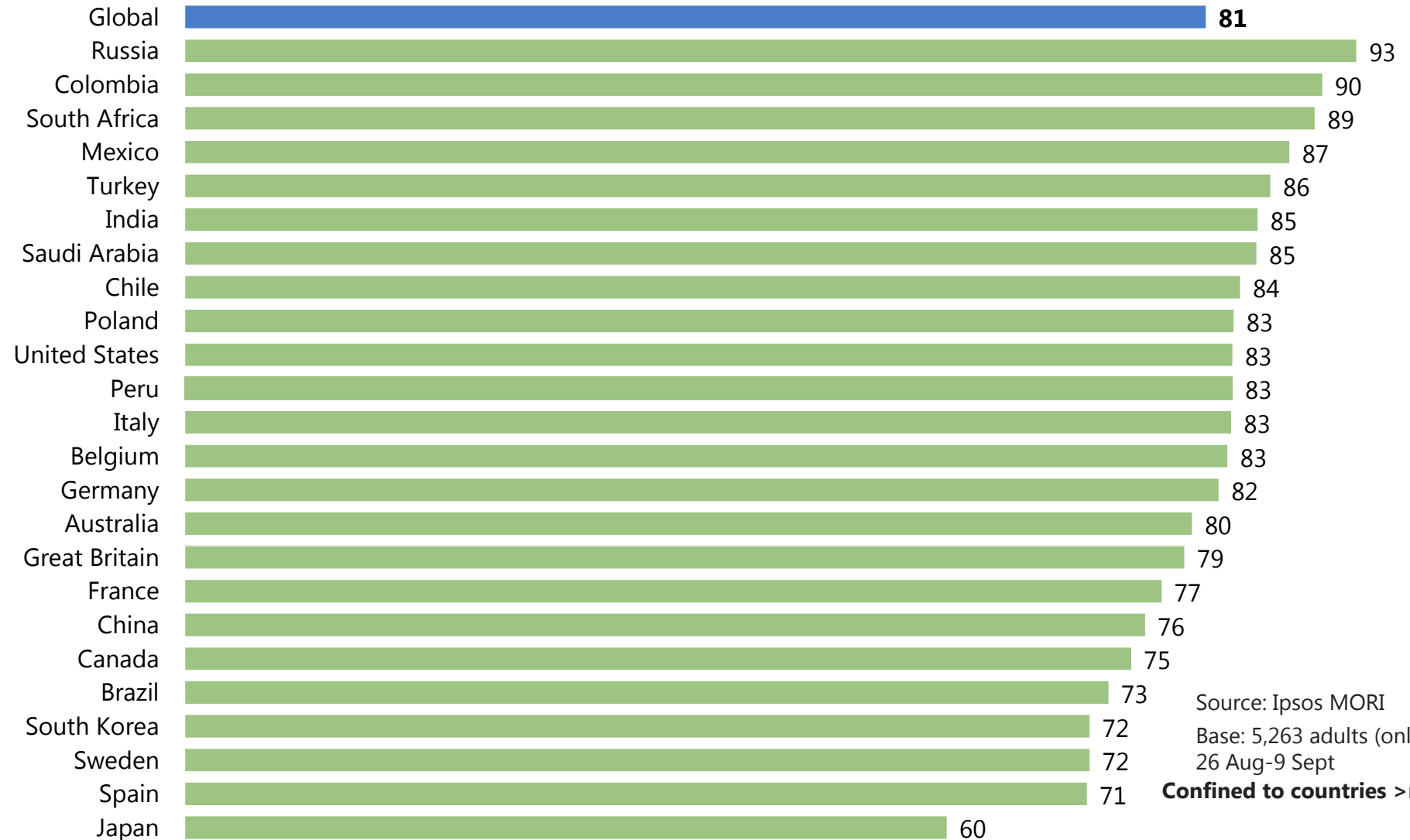


Satisfaction – air travel

Q. Thinking about the last time you made a journey by.... how satisfied or dissatisfied were you with your experience of that journey?

By aeroplane

% very/fairly satisfied



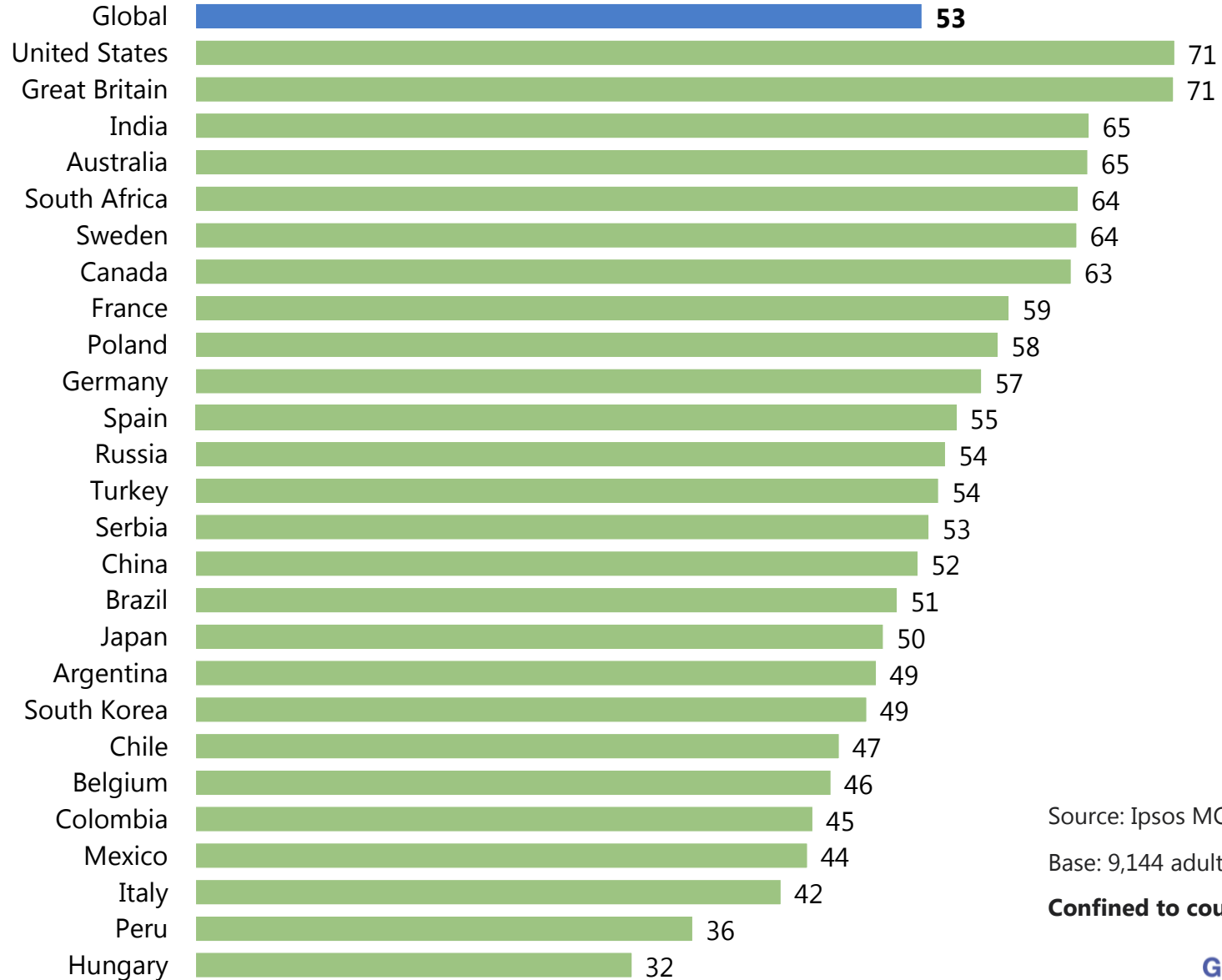
Source: Ipsos MORI
Base: 5,263 adults (online),
26 Aug-9 Sept
Confined to countries >n=100

Satisfaction – bus/coach

Q. Thinking about the last time you made a journey by.... how satisfied or dissatisfied were you with your experience of that journey?

Bus services/coach

% very/fairly satisfied



Source: Ipsos MORI

Base: 9,144 adults (online), 26 Aug-9 Sept

Confined to countries >n=100

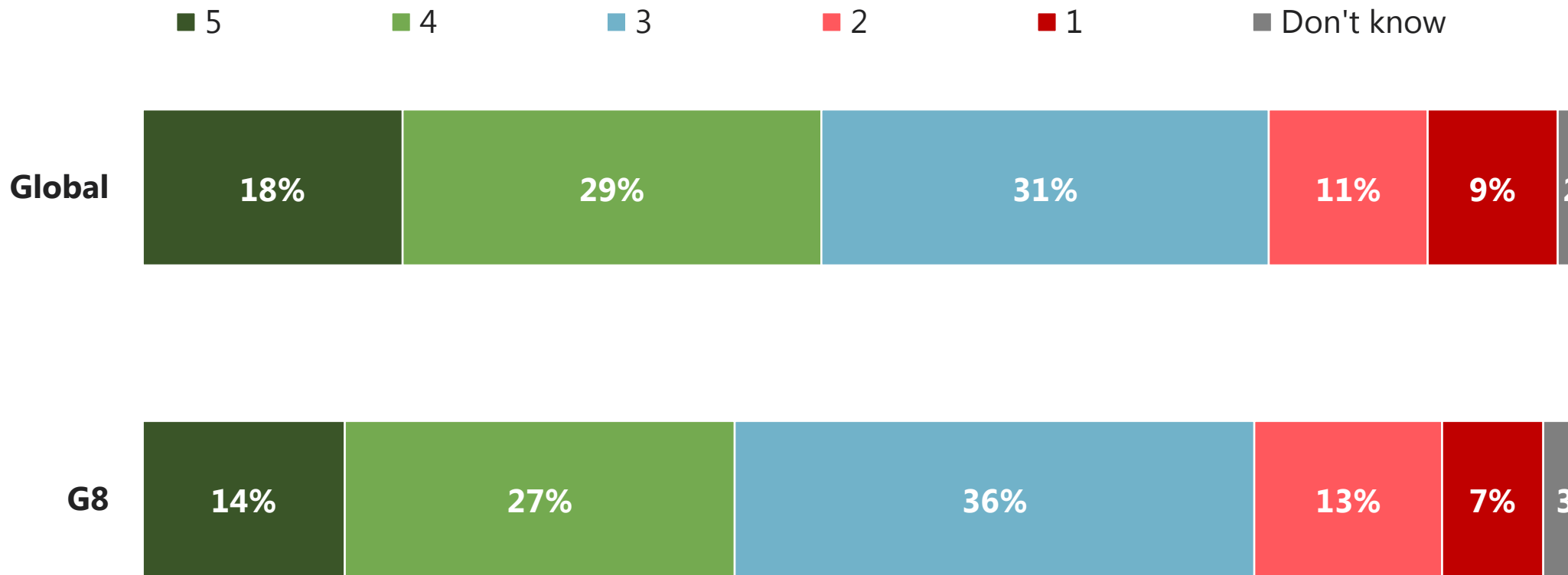
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Value for money – underground rail

Q. Thinking about the last time you made a journey by...., how would you rate the value for money of that journey on a scale of 1-5 where 1 is very poor value for money, and 5 is very good value for money?

Underground/metro



Source: Ipsos MORI

Base: 6,376 adults (online), Aug-Sept 2017

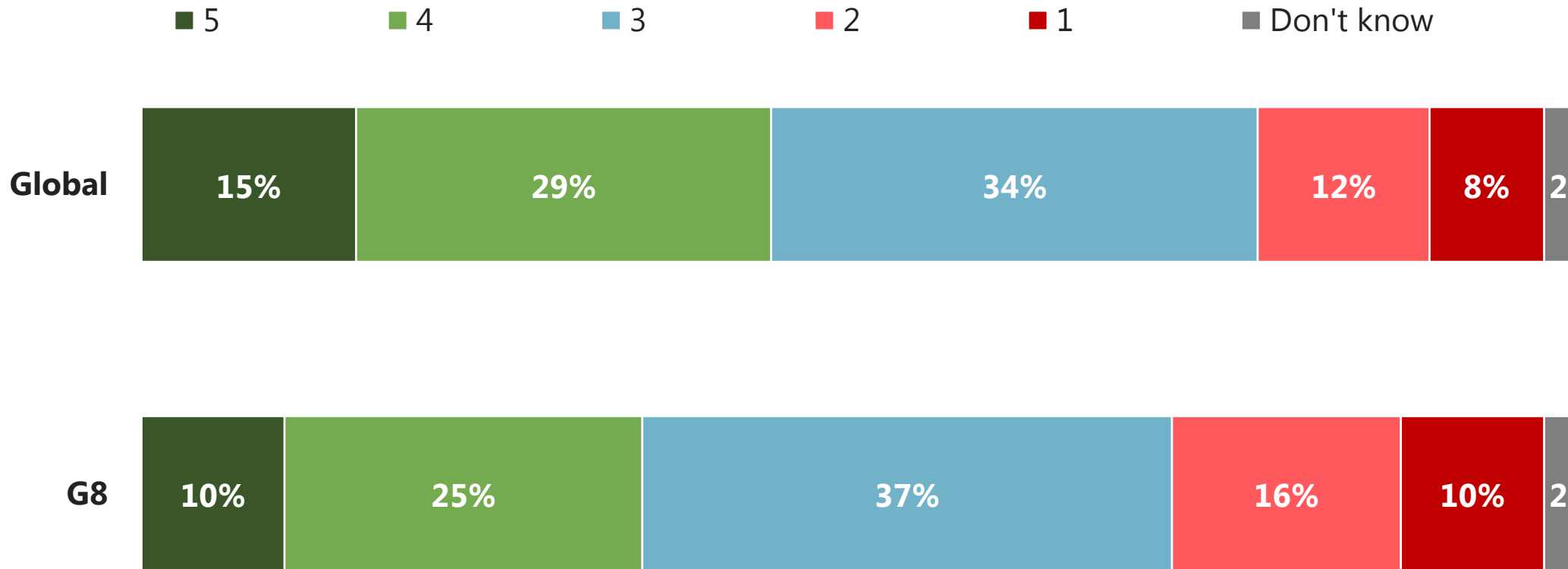
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Value for money – overground rail

Q. Thinking about the last time you made a journey by...., how would you rate the value for money of that journey on a scale of 1-5 where 1 is very poor value for money, and 5 is very good value for money?

Overground/railway



Source: Ipsos MORI

Base: 6,279 adults (online), Aug-Sept 2017

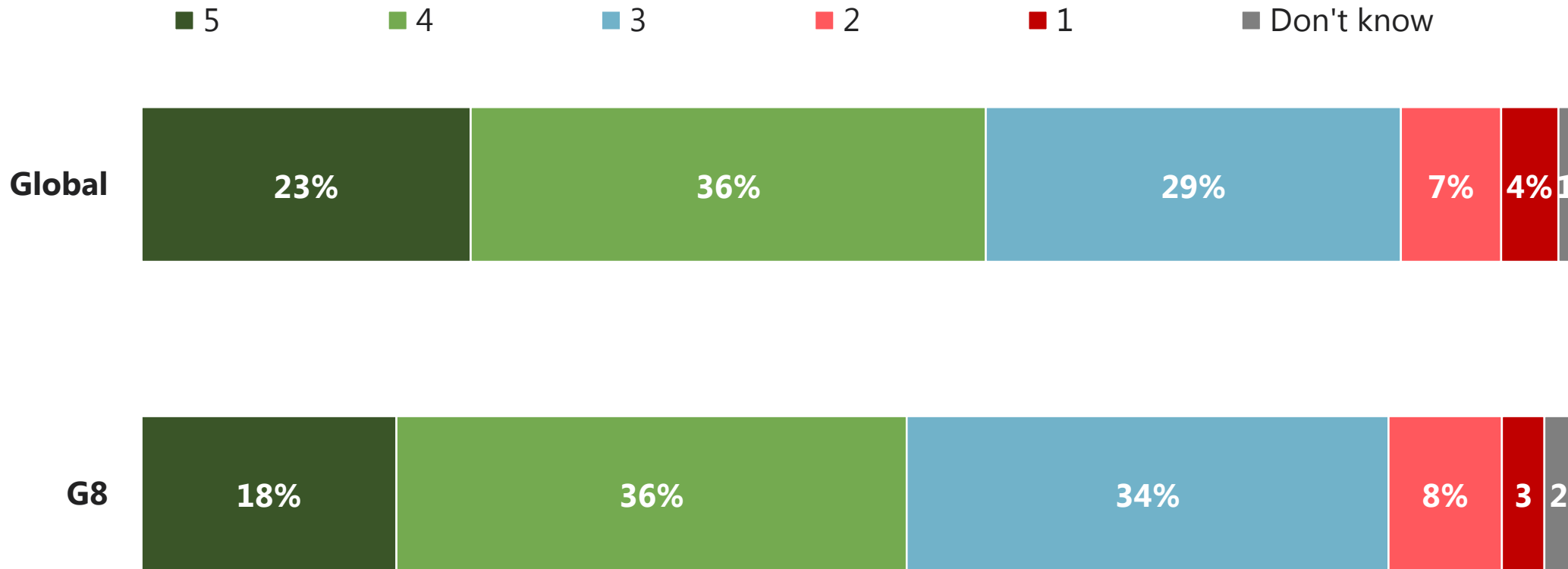
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Value for money – air travel

Q. Thinking about the last time you made a journey by...., how would you rate the value for money of that journey on a scale of 1-5 where 1 is very poor value for money, and 5 is very good value for money?

By aeroplane



Source: Ipsos MORI

Base: 5,263 adults (online), Aug-Sept 2017

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Further

information

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