



Global Infrastructure Index

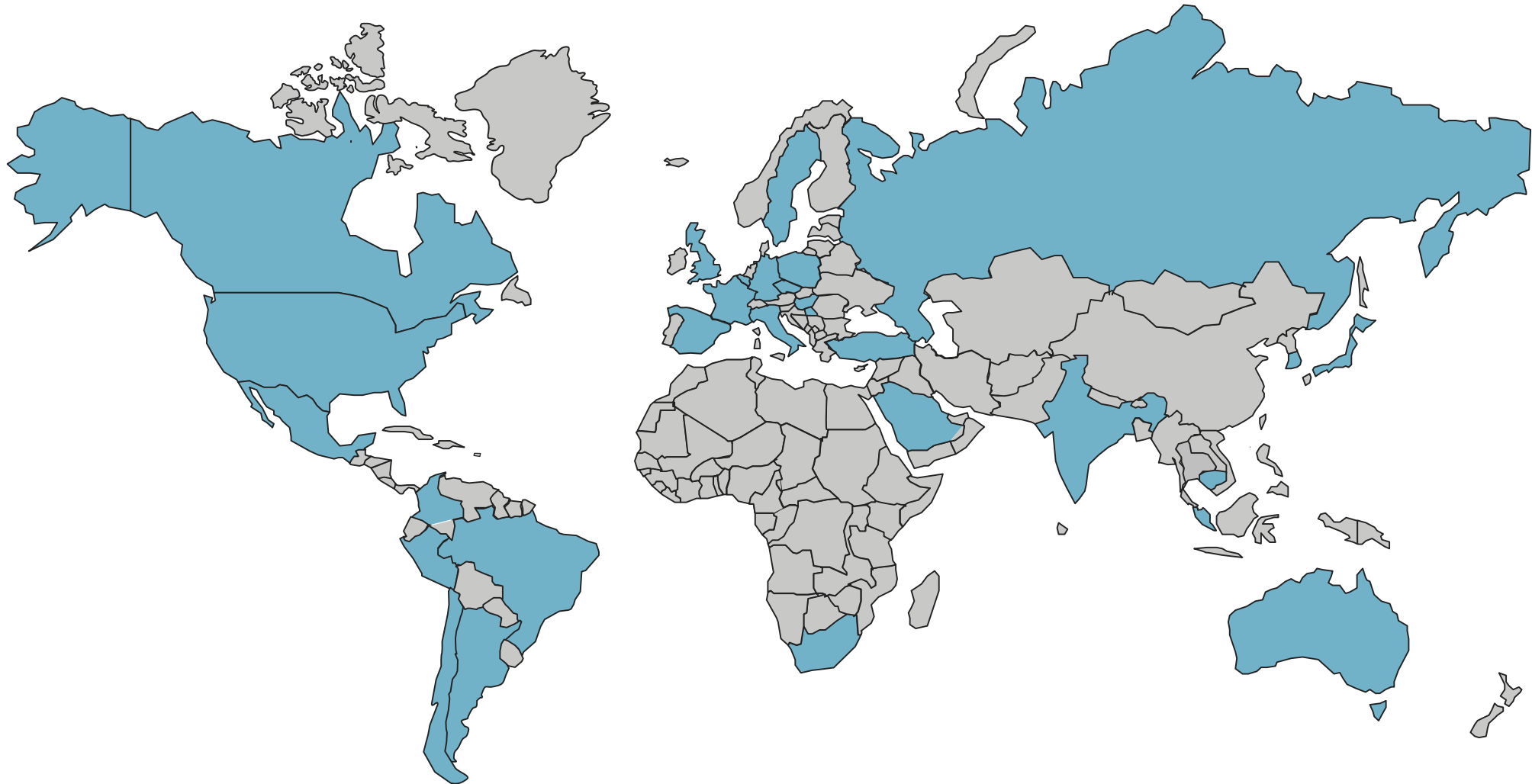
Public satisfaction and priorities – 2018

Great Britain



Introduction

- These are the findings of the third **Global Infrastructure Index** conducted via Ipsos' Global @dvisor between **24 August – 7 September 2018** in **28 countries** around the world via the Ipsos Online Panel system and involving **19,786** participants:

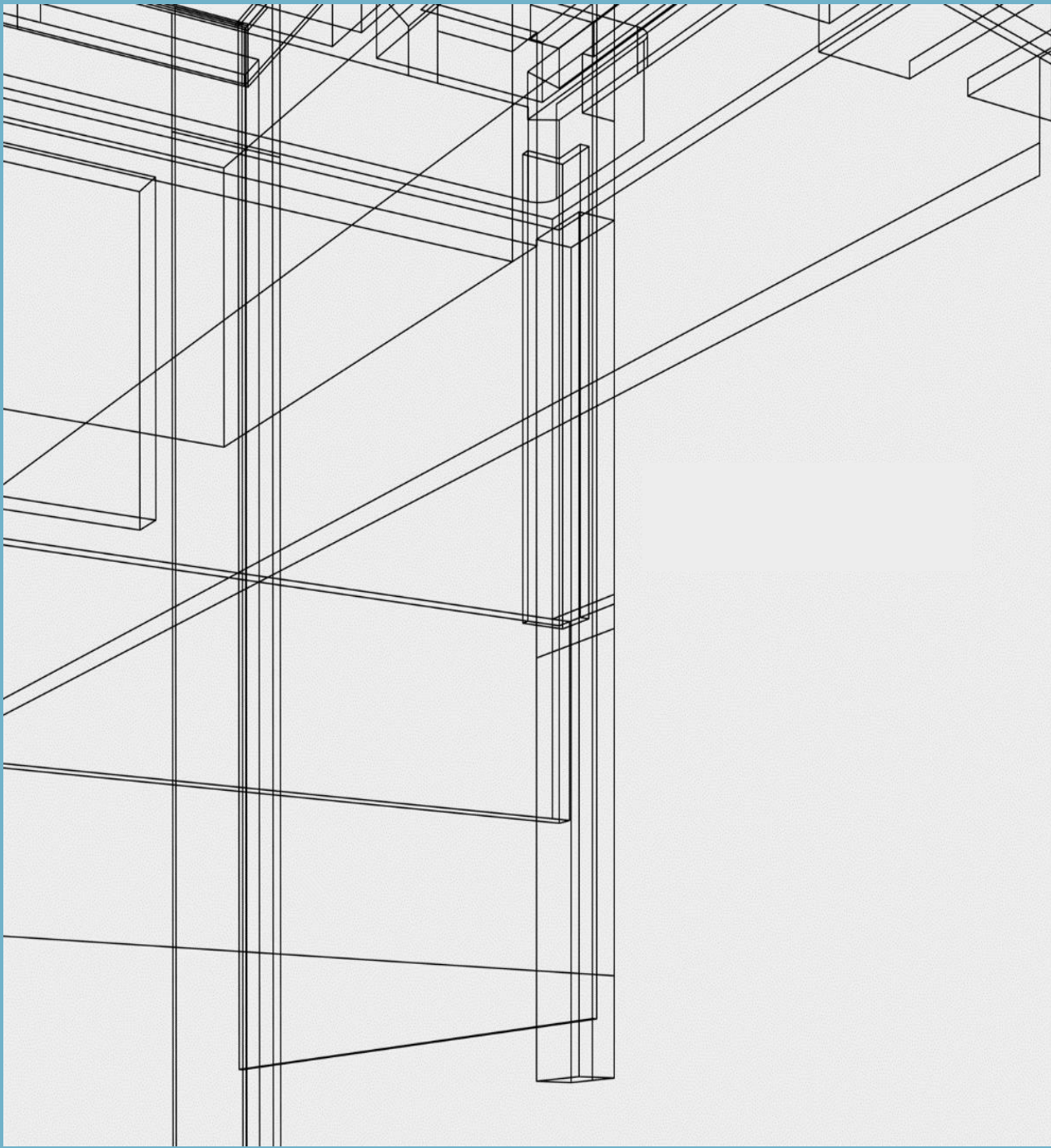


Methodology

- 28 countries, **19,786** participants:
Argentina, Australia*, Belgium, Brazil, Canada*, Chile, Colombia, France*, Germany*, **Great Britain (1,006)***, Hungary, India*, Italy*, Japan*, Malaysia, Mexico, Peru, Poland, Romania, Russia, Saudi Arabia, South Africa, South Korea, Serbia, Spain*, Sweden, Turkey and the United States of America*
** denotes 1,000+ sample size*
- Independently of Global @dvisor, 500 participants were sampled in the Czech Republic. Results have been shown in comparative tables but are not included in 'global' (nor Europe) data.
- Participants were adults aged 18-64 in the US and Canada, 18-65 in Czech Republic and adults aged 16-64 in all other countries.
- Results may not sum to 100% and combinations to their constituent %s (e.g. very/fairly satisfied) due to computer rounding.
- The 2016 and 2017 surveys used the same methodology, but the profile of participating countries changed in both years. This means that the **global trend** does not involve a like-for-like comparison. Please note that the survey was also undertaken additionally in the Czech Republic, but results for this country are **not** included in Global totals.
- A selection of trends is included. Further information (with a GB focus) is available:

<https://www.ipsos.com/ipsos-mori/en-uk/rail-joins-housing-top-infrastructure-priorities-britons> (2017)

<https://www.ipsos.com/ipsos-mori/en-uk/do-more-poll-shows-britons-behind-action-infrastructure> (2016)



Overall ratings

Trends: Overall ratings

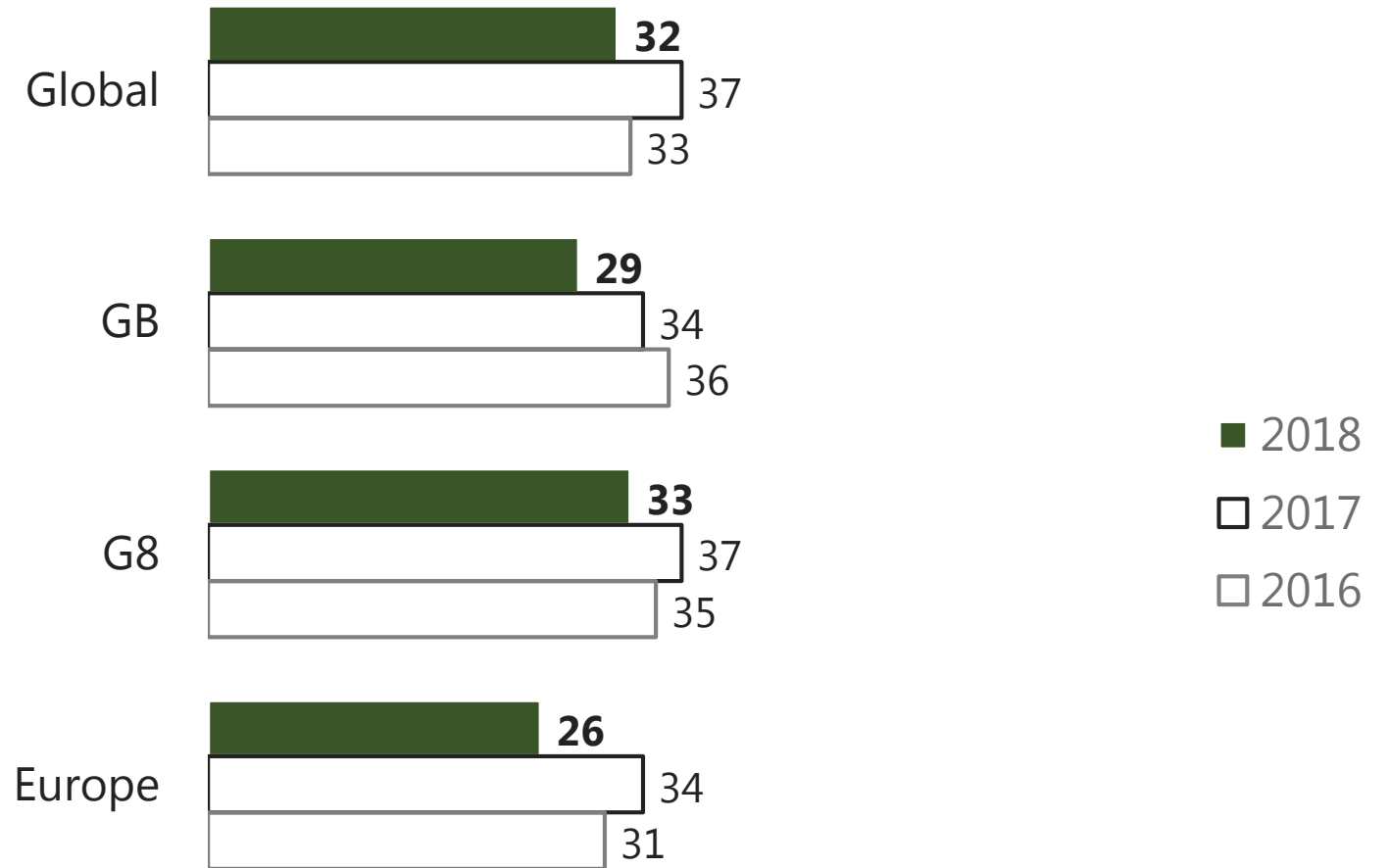
Q. I now want you to think about [COUNTRY'S] infrastructure.

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

The 2016-18 surveys used the same methodology, but the profile of participating countries changed between years. This means that the **global and regional trends** do not always involve a strict like-for-like comparison.



Source: Ipsos MORI/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

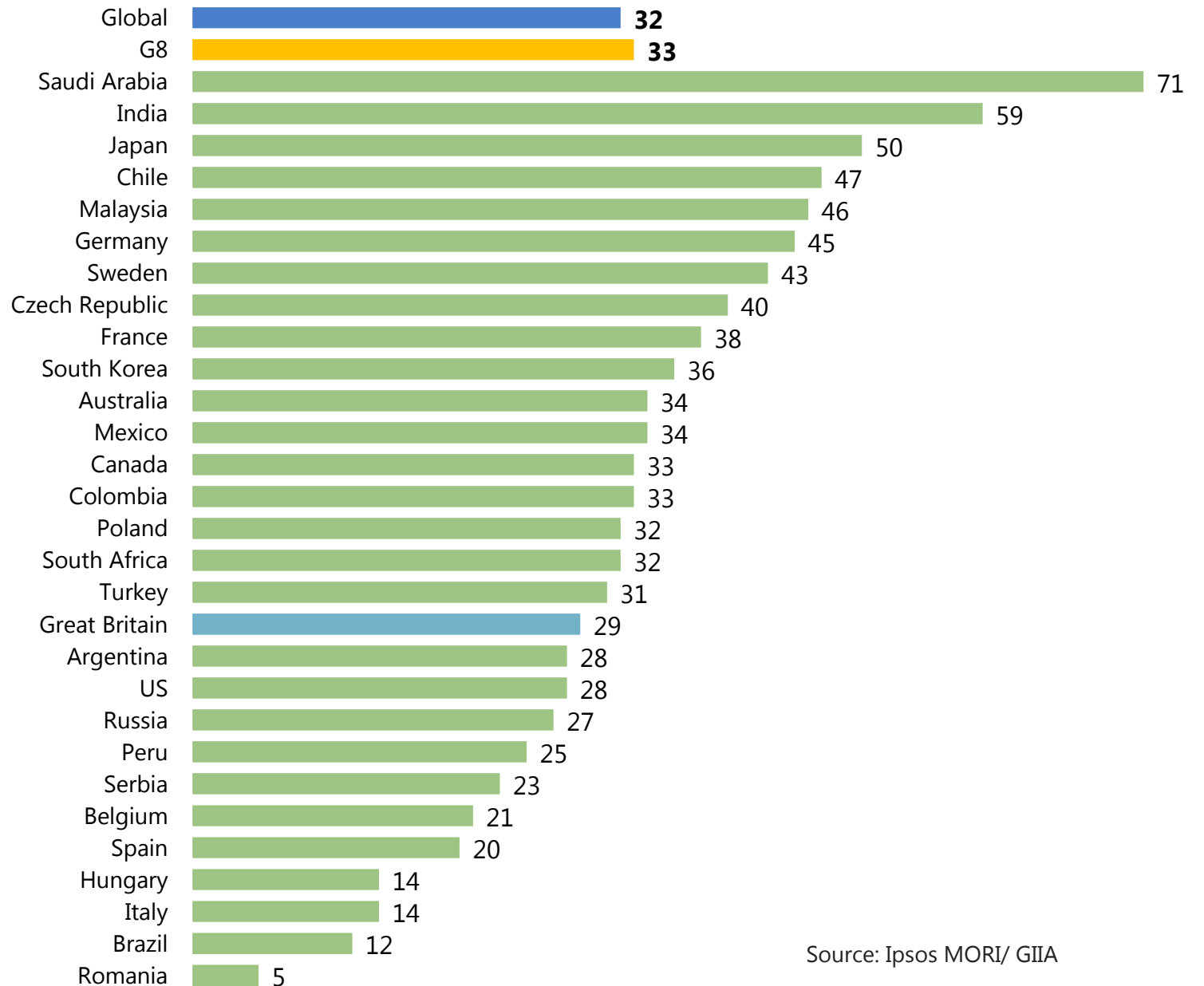
Global: Overall

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/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

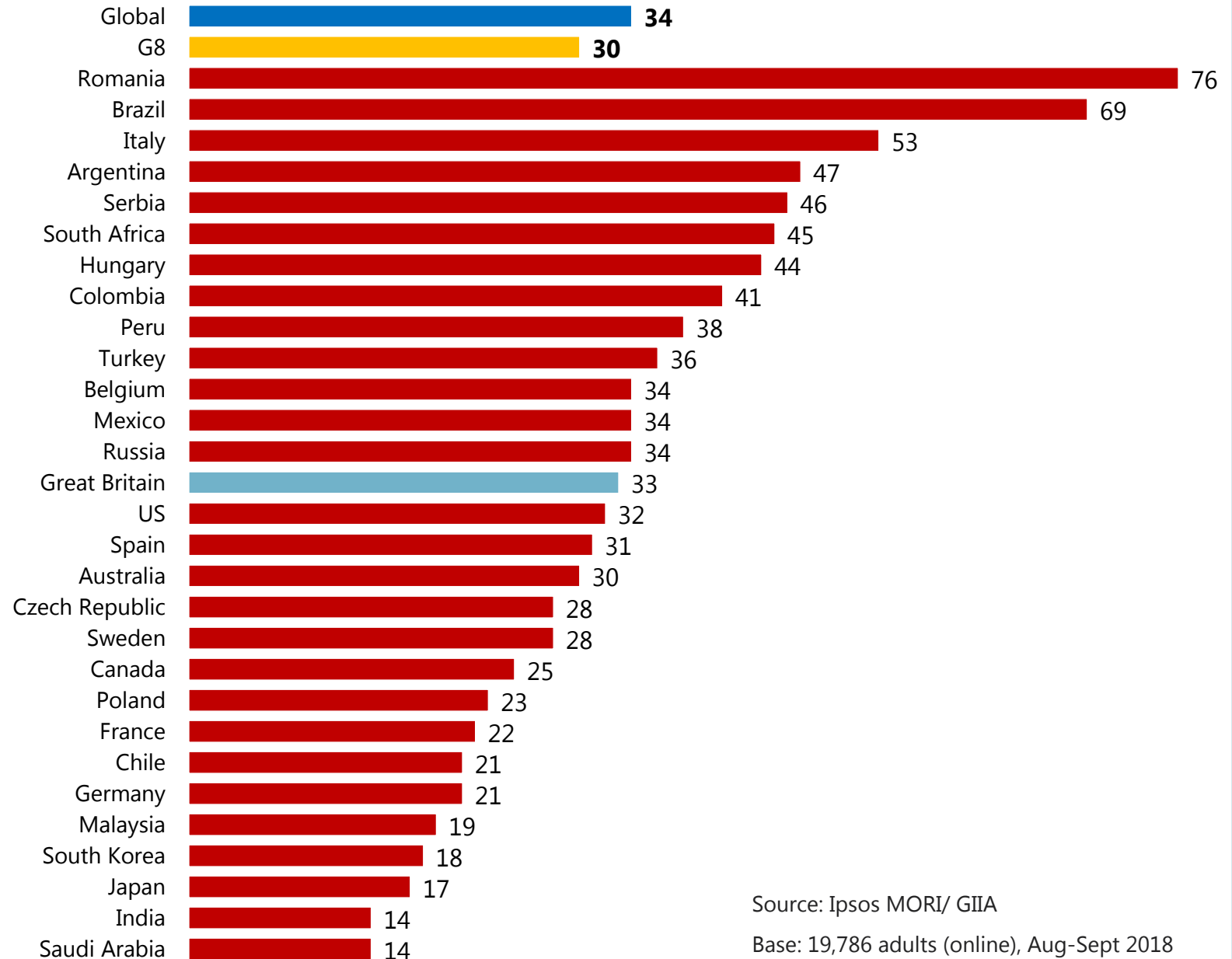
Global: Overall

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/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Trends: Overall

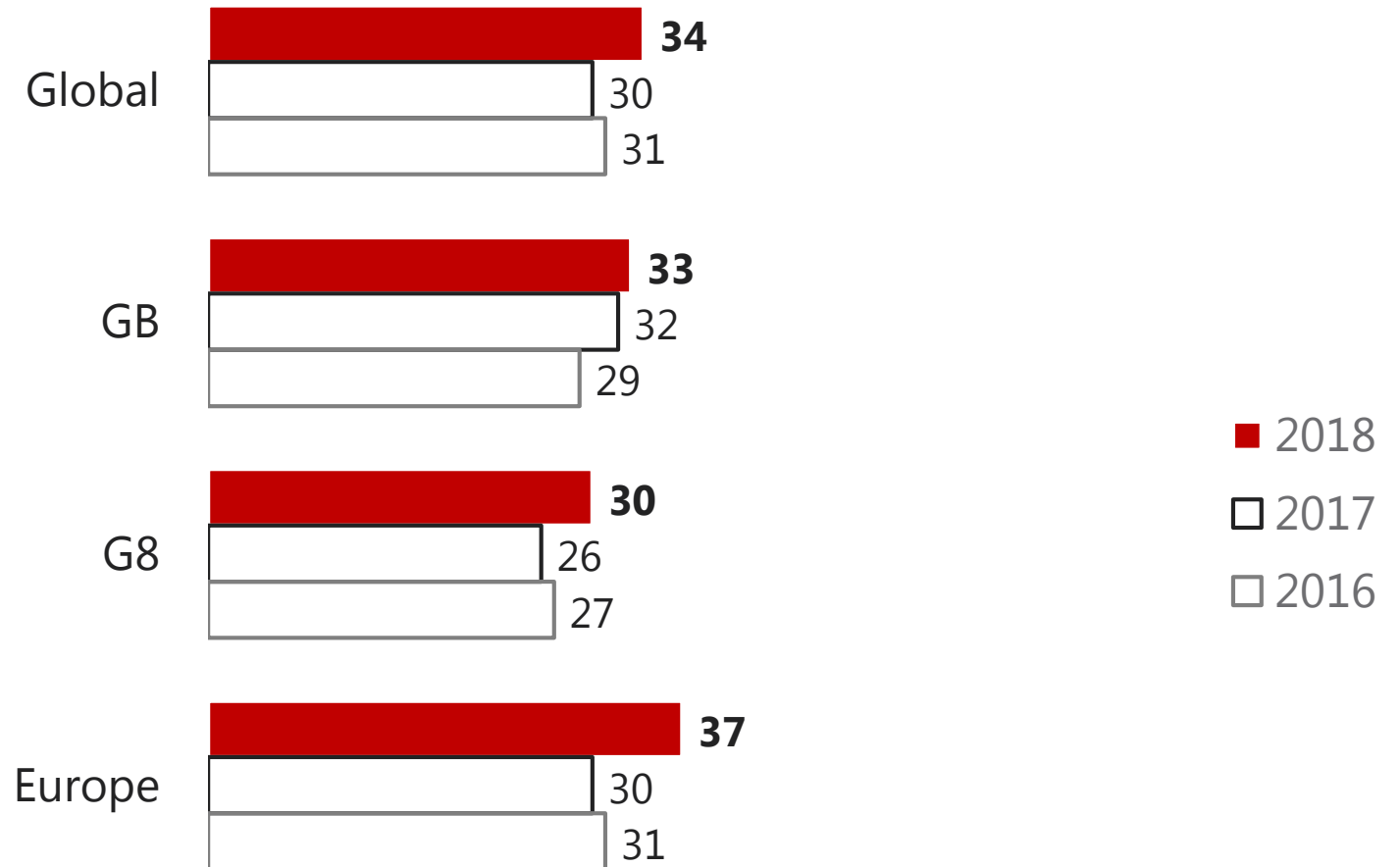
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Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

% very/fairly dissatisfied

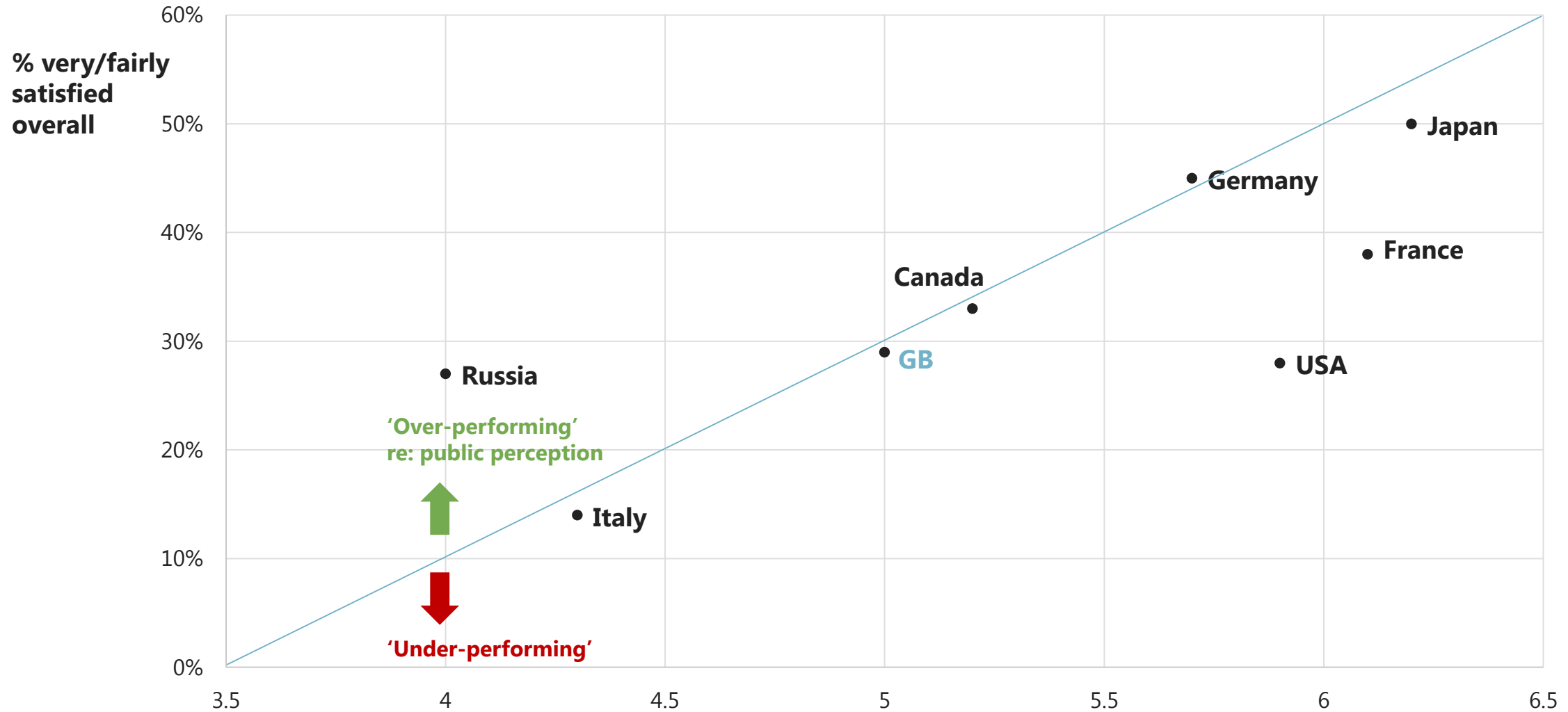
The 2016-18 surveys used the same methodology, but the profile of participating countries changed between years. This means that the **global and regional trends** do not always involve a strict like-for-like comparison.



Source: Ipsos MORI/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

GB and G8: Overall ratings v GCI



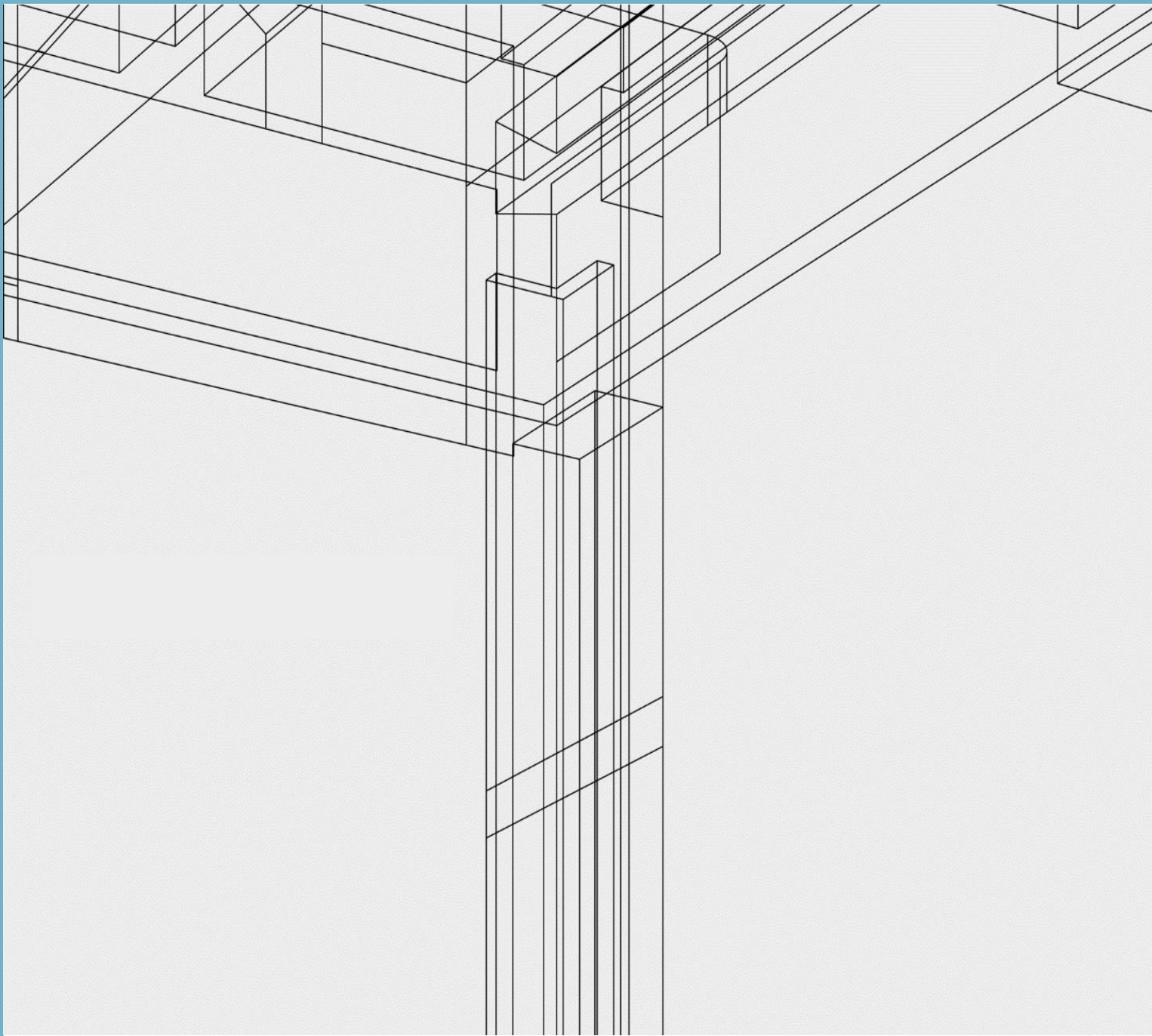
* Source: The World Economic Forum's Global Competitiveness Report 2017-2018. The chart shows the GCI rating (2.01) for "infrastructure overall" (1-7 where 7=best).



Source: Ipsos MORI/ GIIA

GCI - Global Competitiveness Index (2.01)*

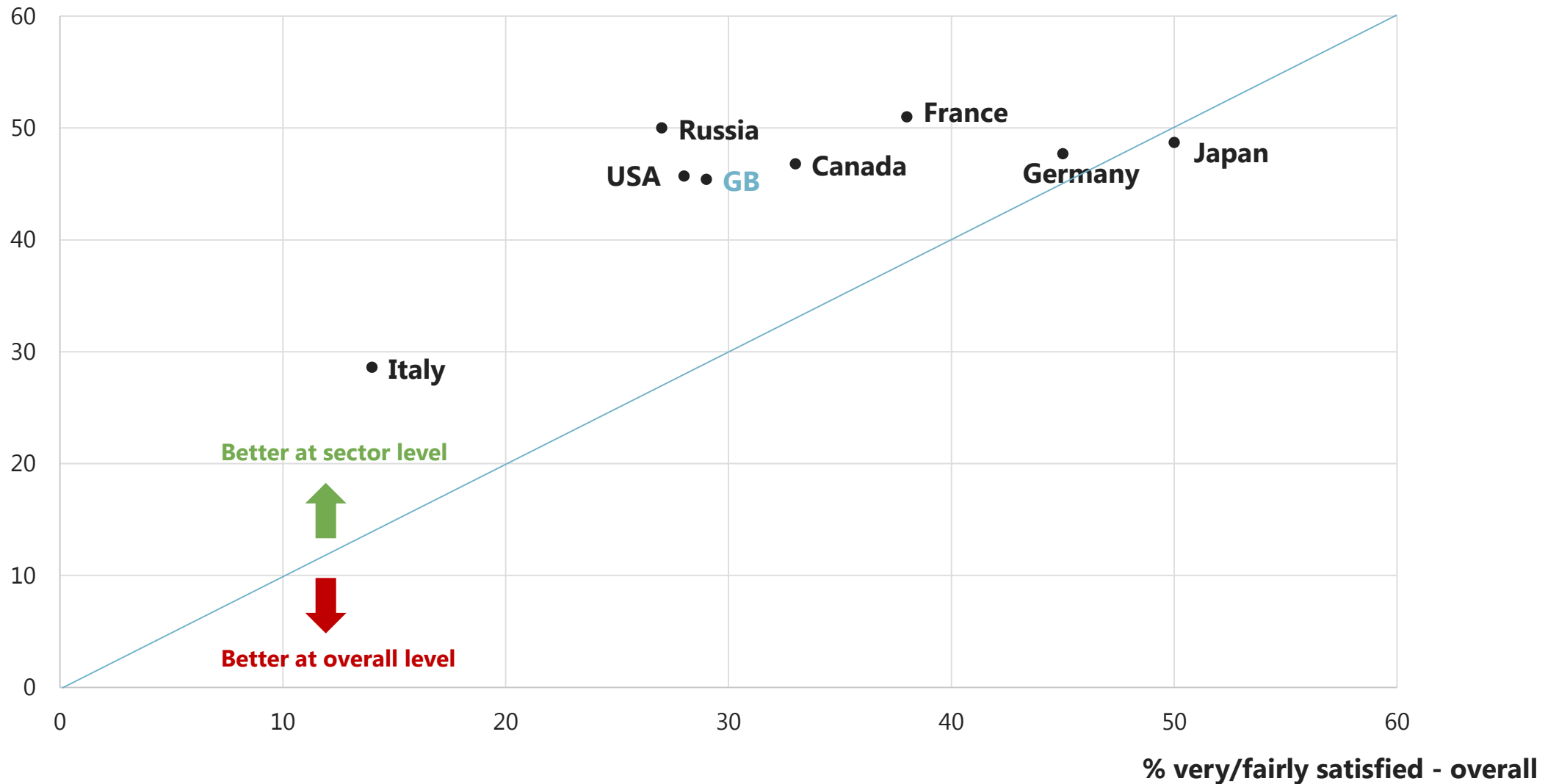
Base: 19,786 adults (online), Aug-Sept 2018



Sectors – ratings

GB and G8: Overall ratings v average sector ratings

% very/fairly
good
- sector
average



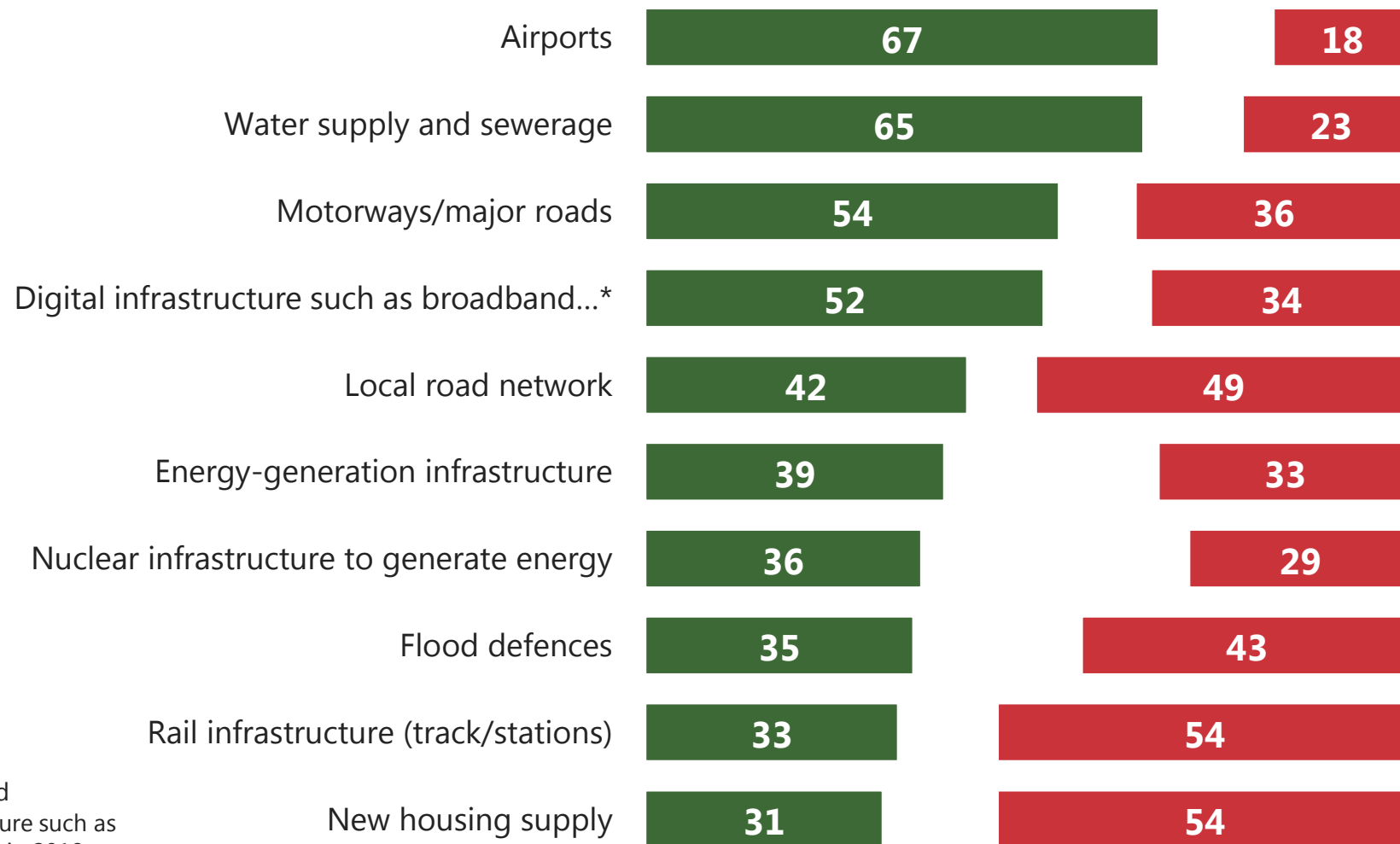
GB: Sector ratings

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]...

■ % Very/fairly good

■ % Fairly/very poor



* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018



Source: Ipsos MORI/ GIIA

Ranked by % very/fairly good

Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

GB: Sector ratings – trends

(vs 2017)

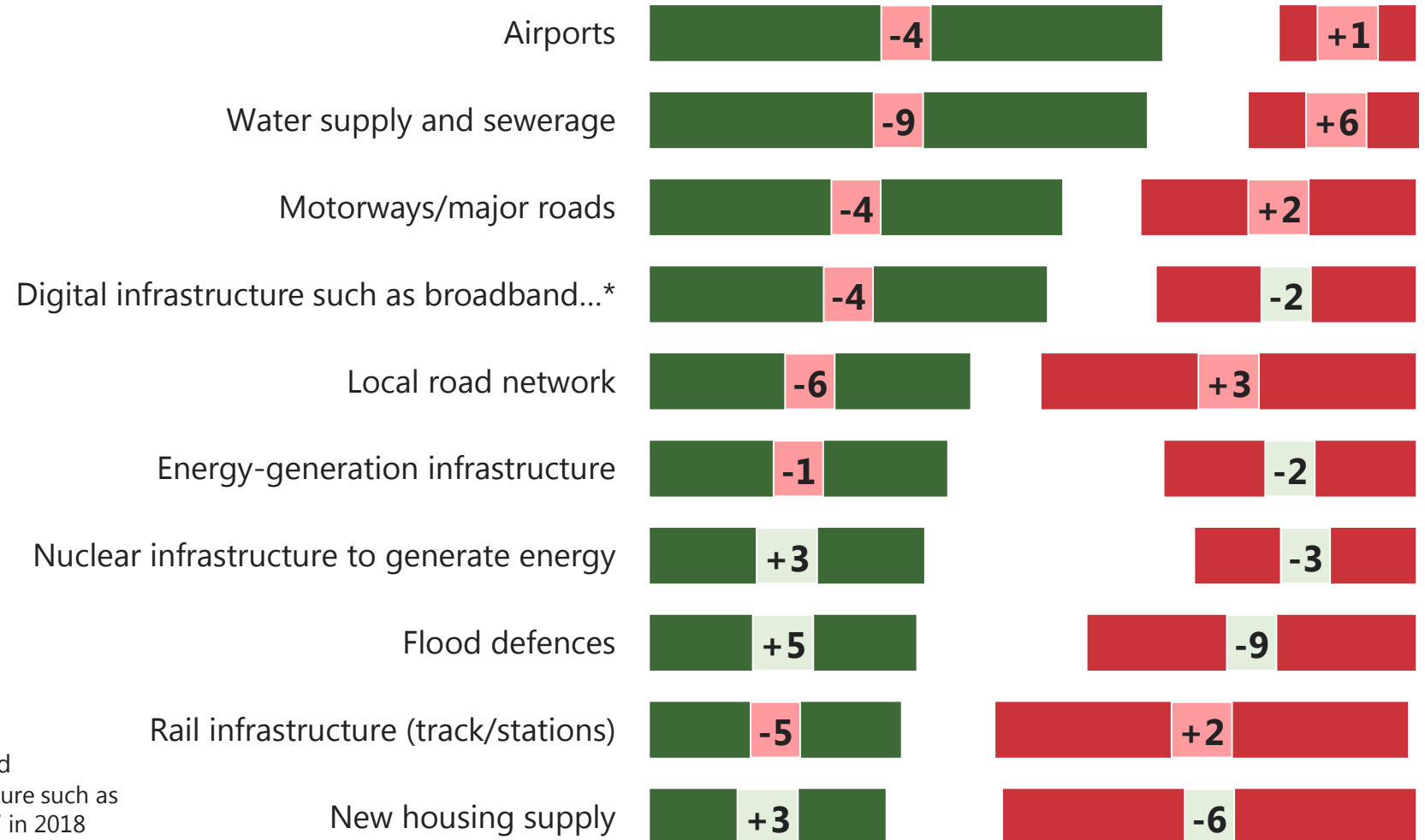
Q. These next questions are about different types of infrastructure.

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

■ % Very/fairly good

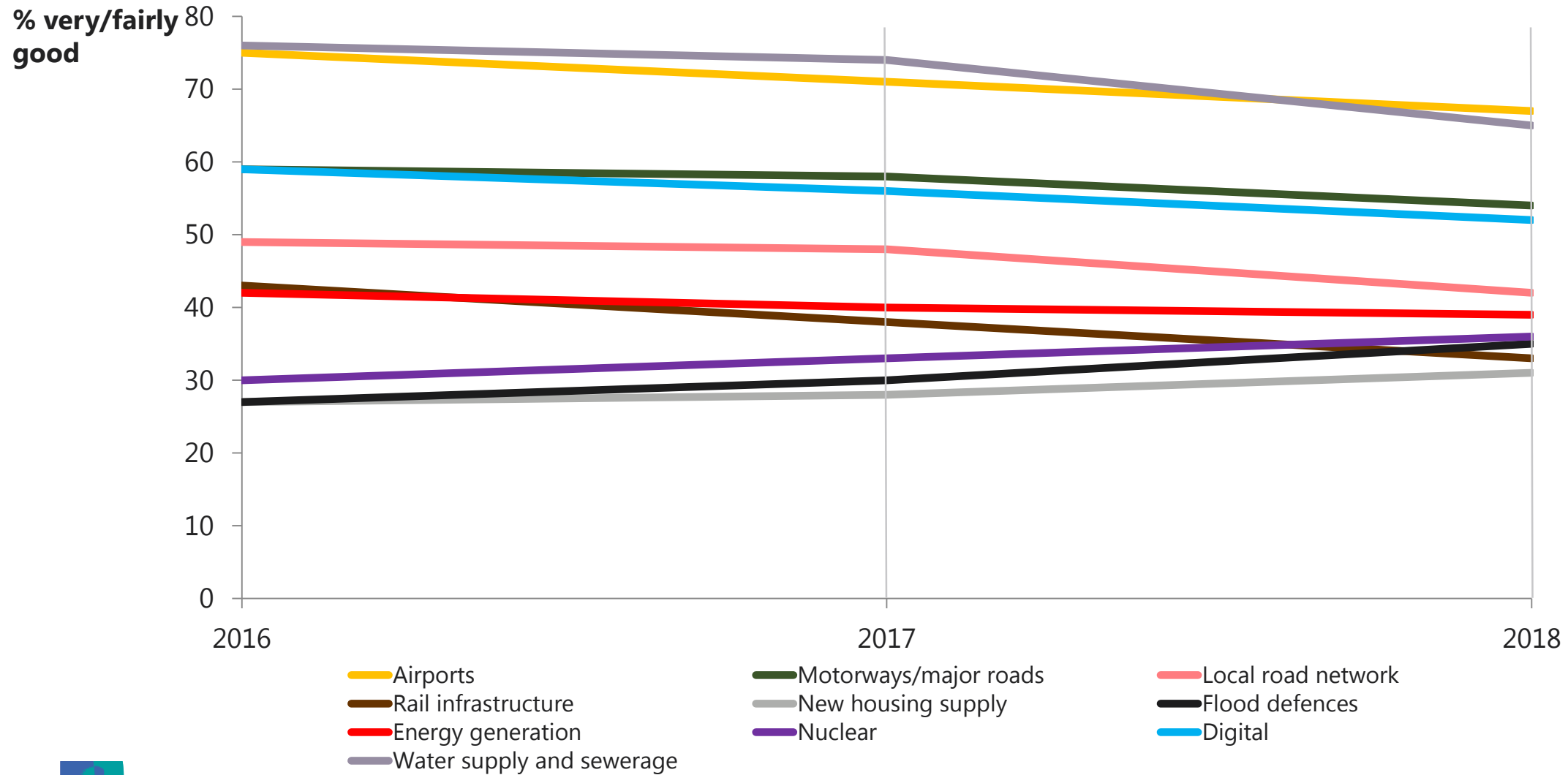
Bars represent % very/fairly good/poor as previous slide

■ % Fairly/very poor



* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018

GB: Sector ratings – trends

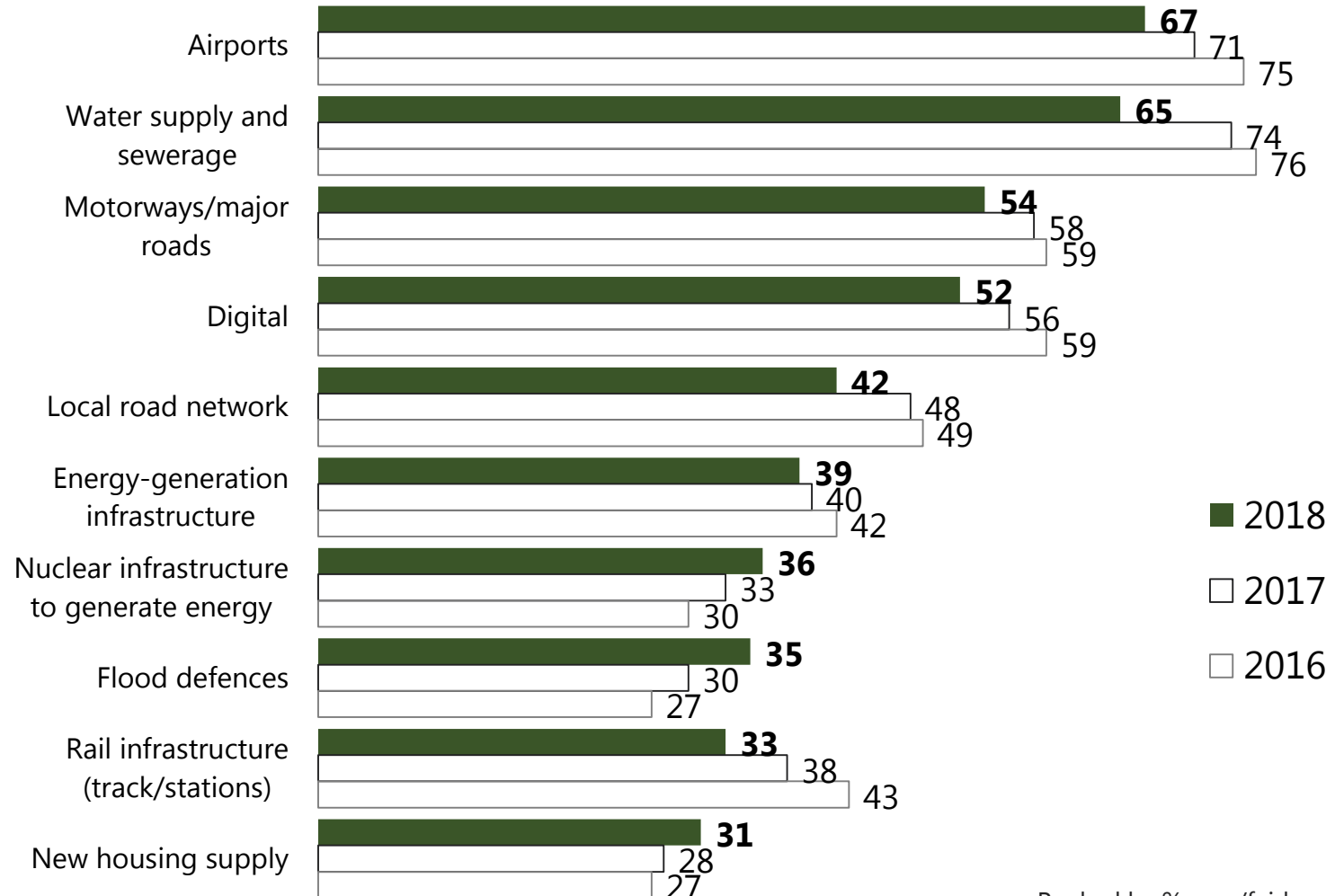


GB: Sector ratings – trends

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]...

% very/fairly good



■ 2018
□ 2017
□ 2016

Ranked by % very/fairly good (2018)

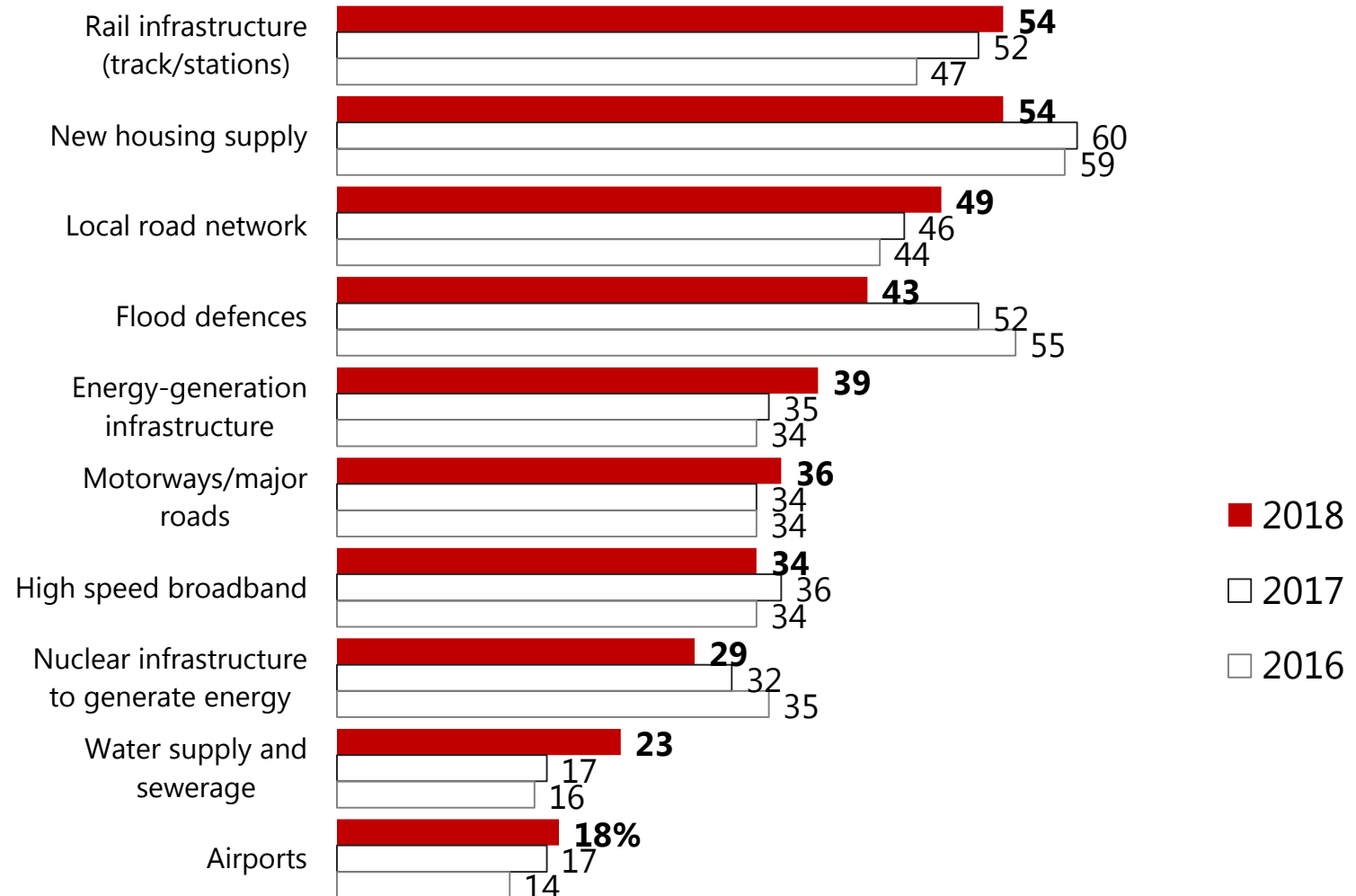
Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

GB: Sector ratings – trends

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]...

% very/fairly poor

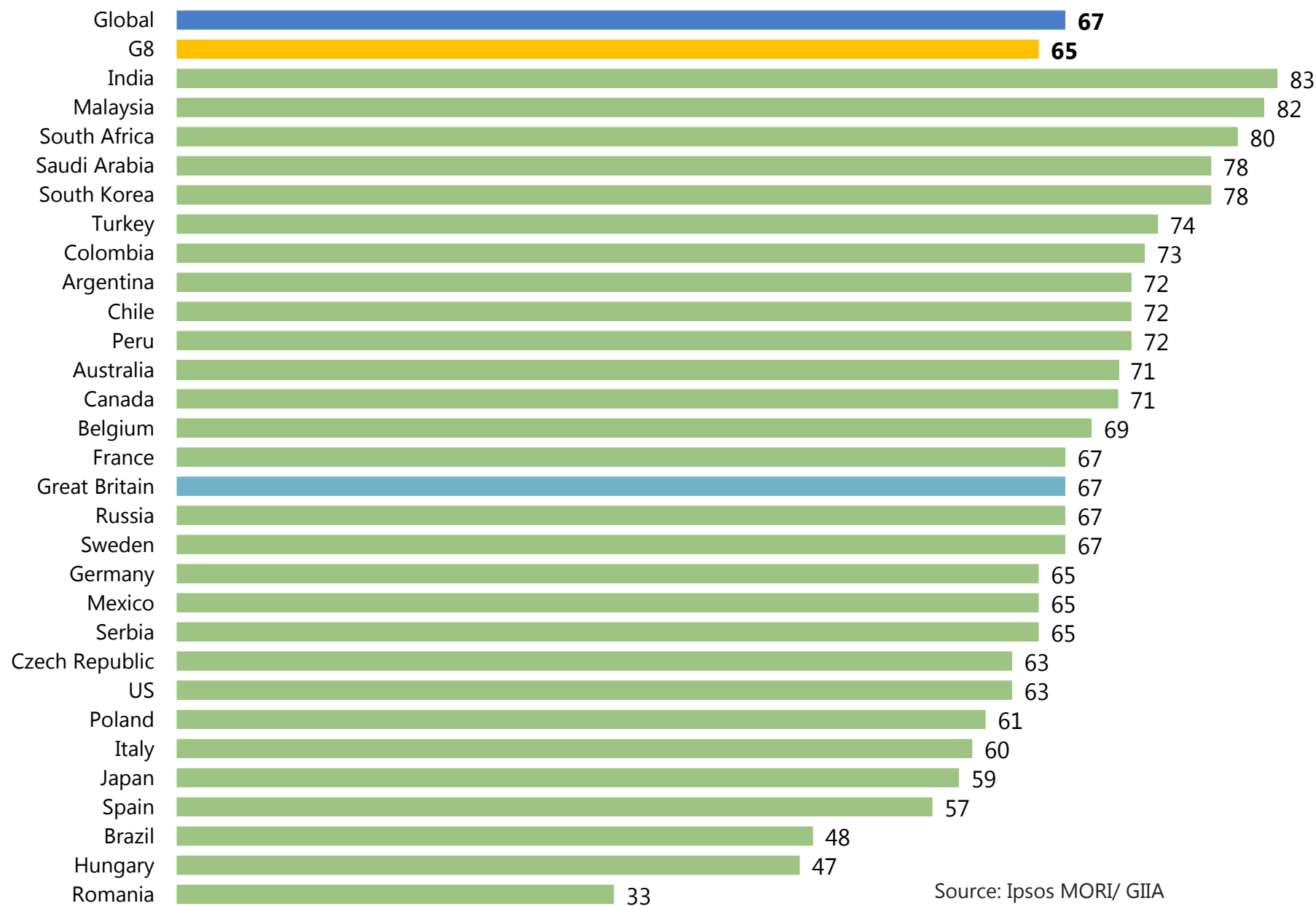


Airports

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/ GIIA

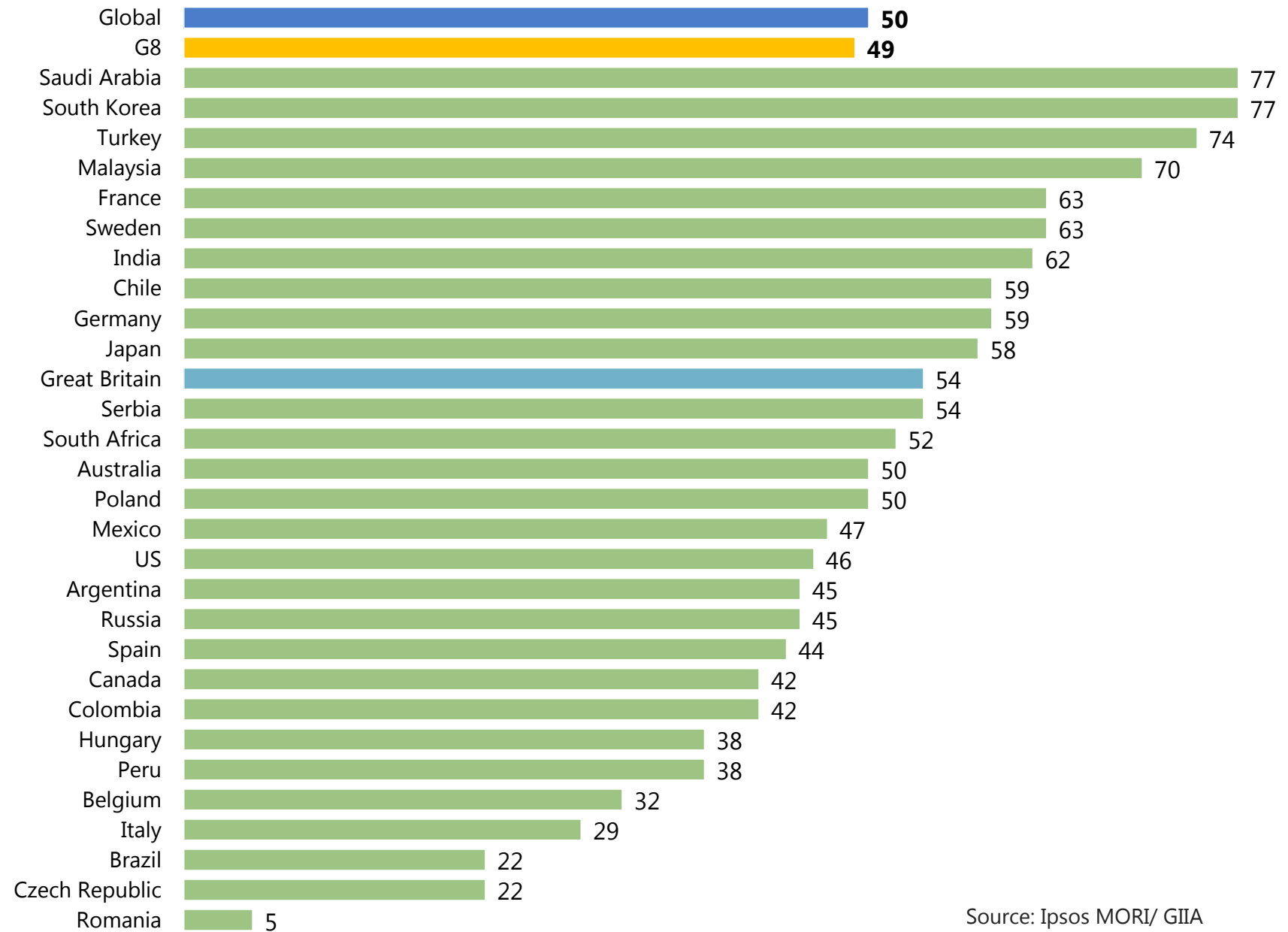
Base: 19,786 adults (online), Aug-Sept 2018

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/ GIIA

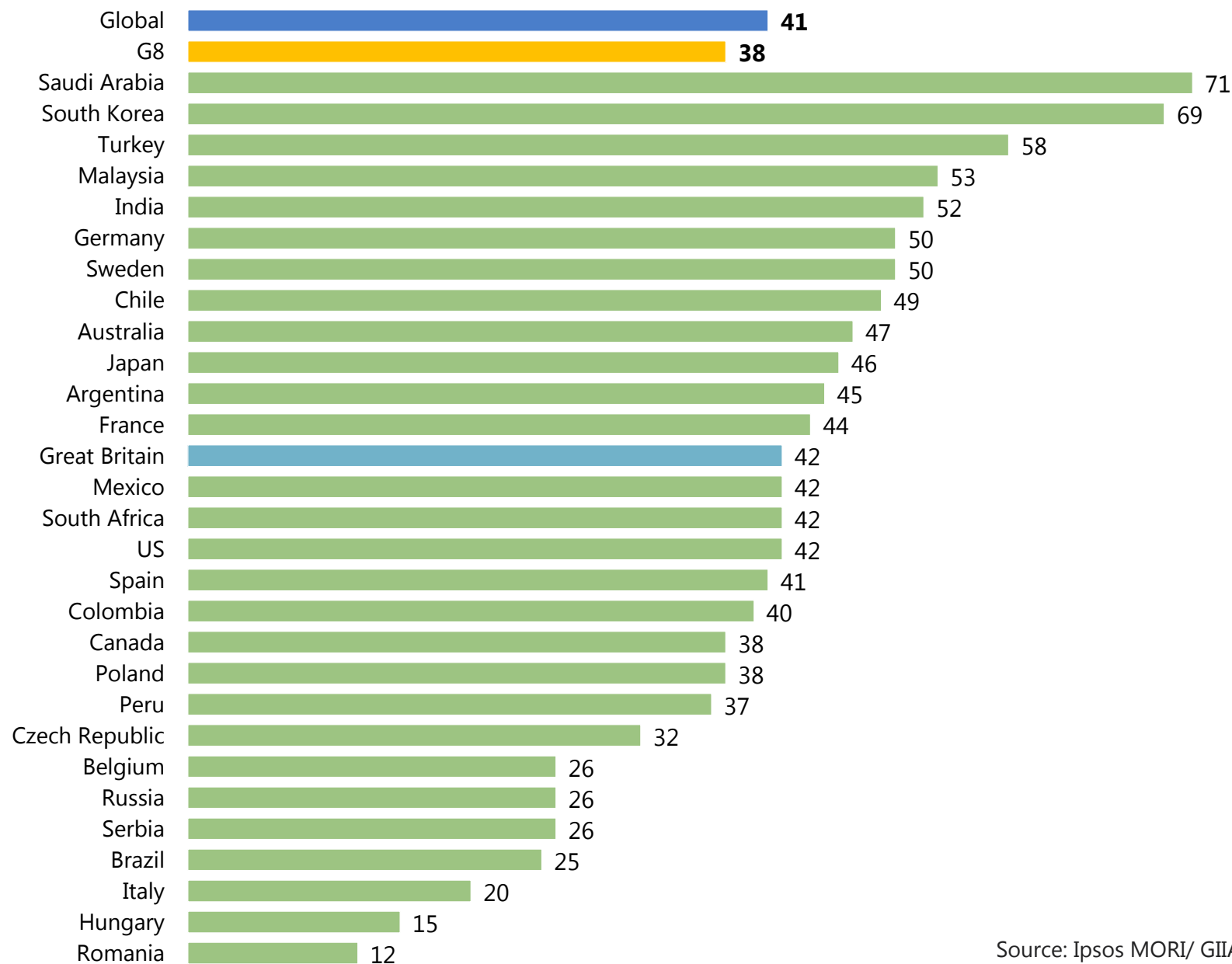
Base: 19,786 adults (online), Aug-Sept 2018

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/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

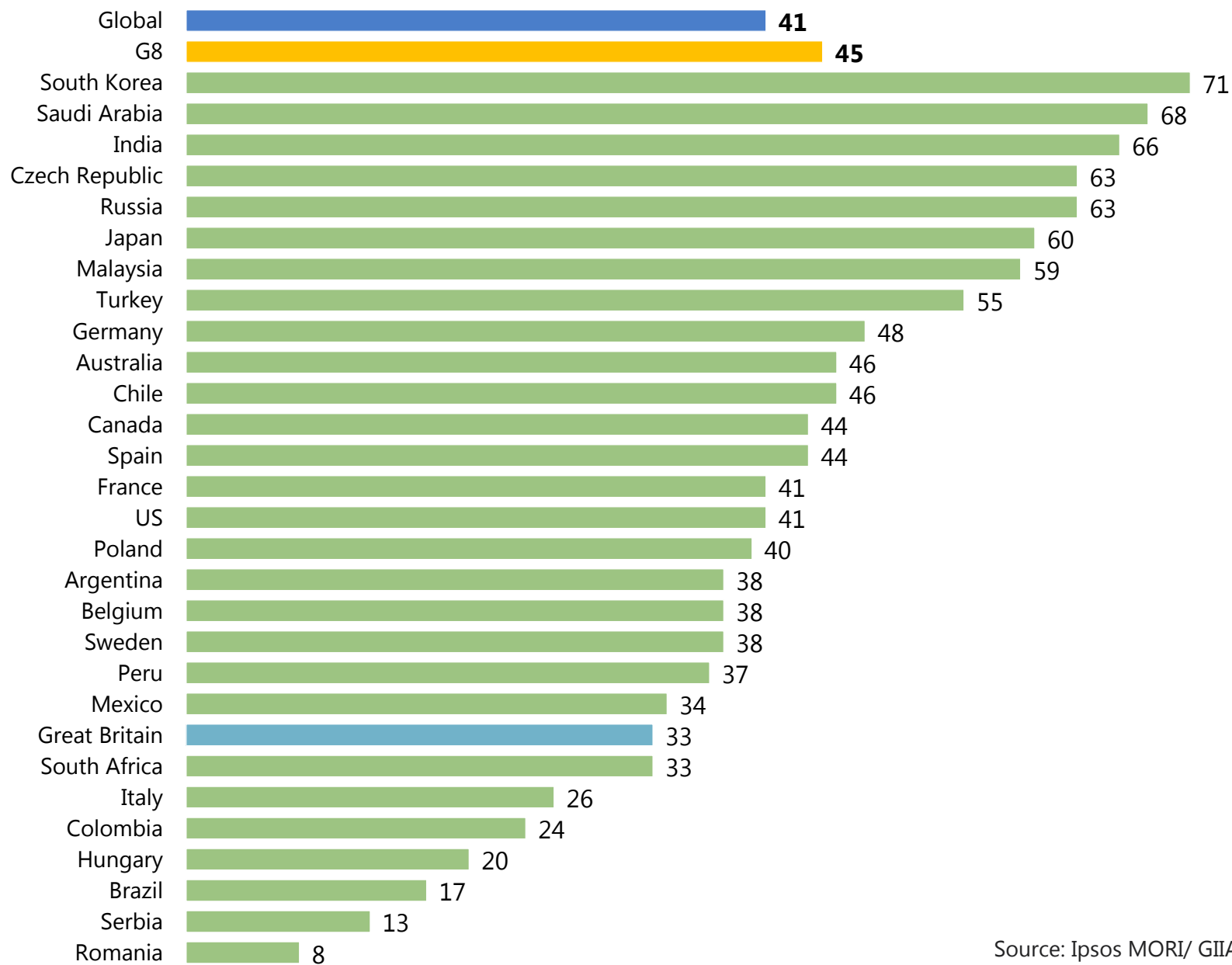
Rail

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/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

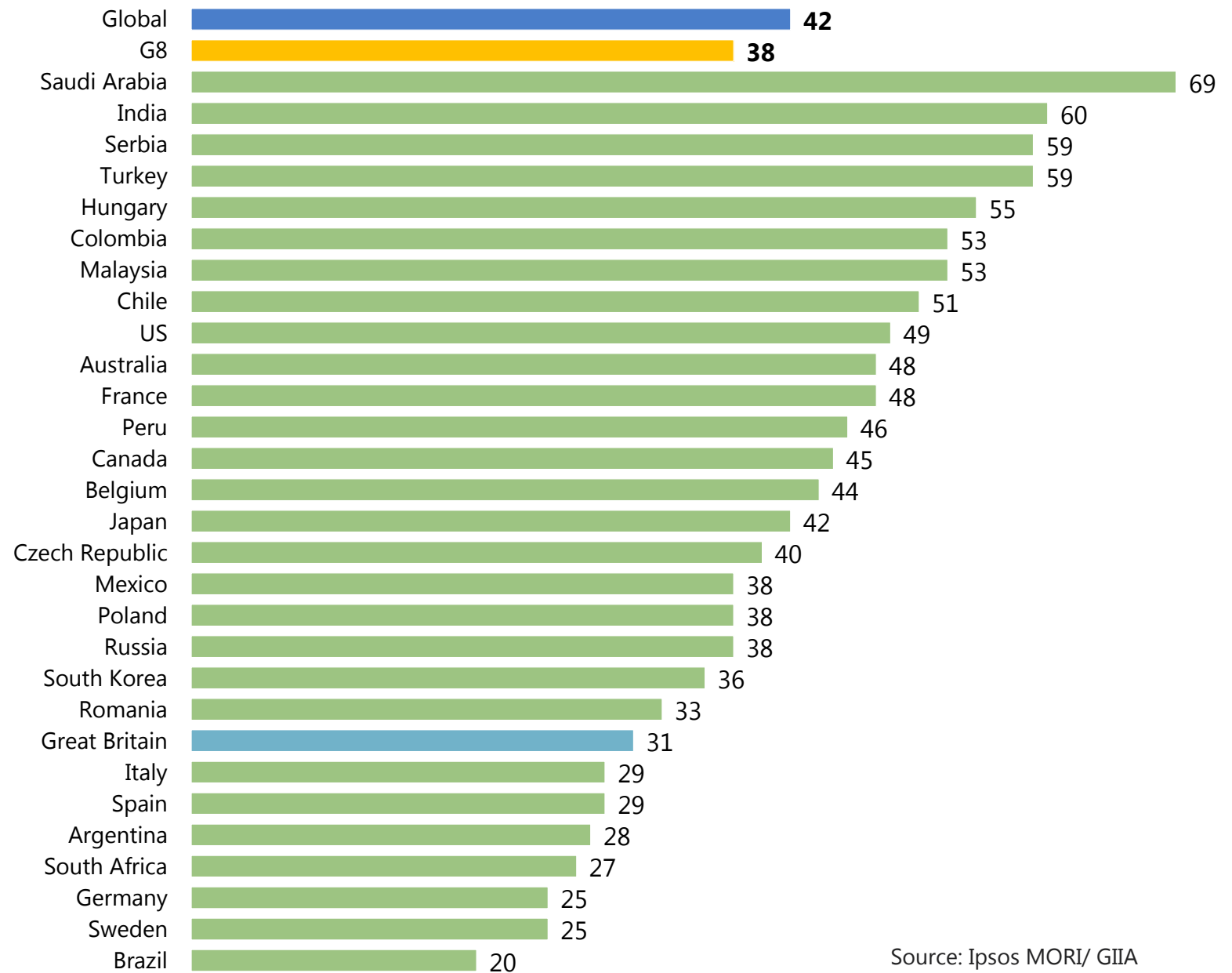
Housing supply

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]...

New housing supply

% very/fairly good



Source: Ipsos MORI/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

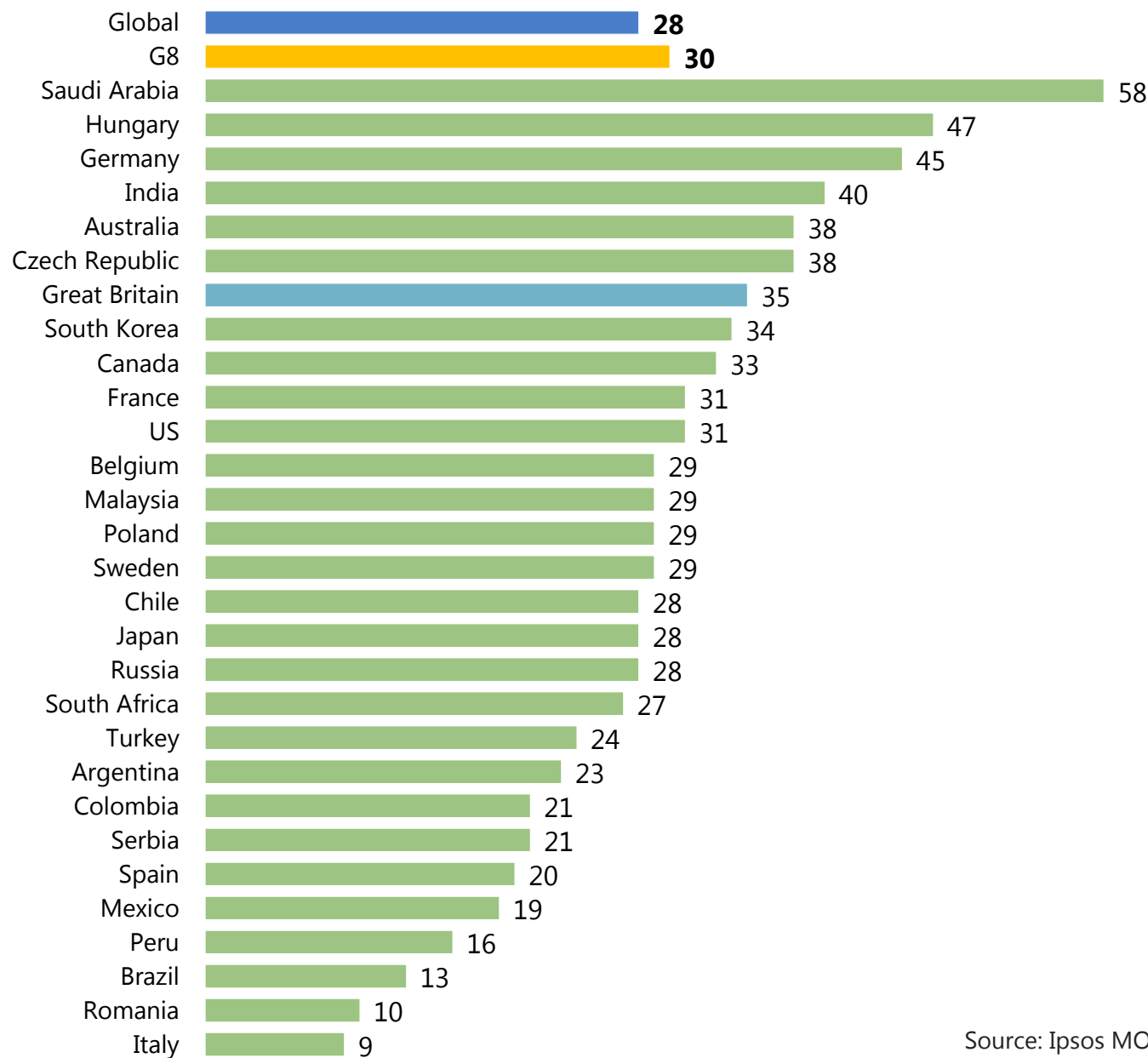
Flood defences

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/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

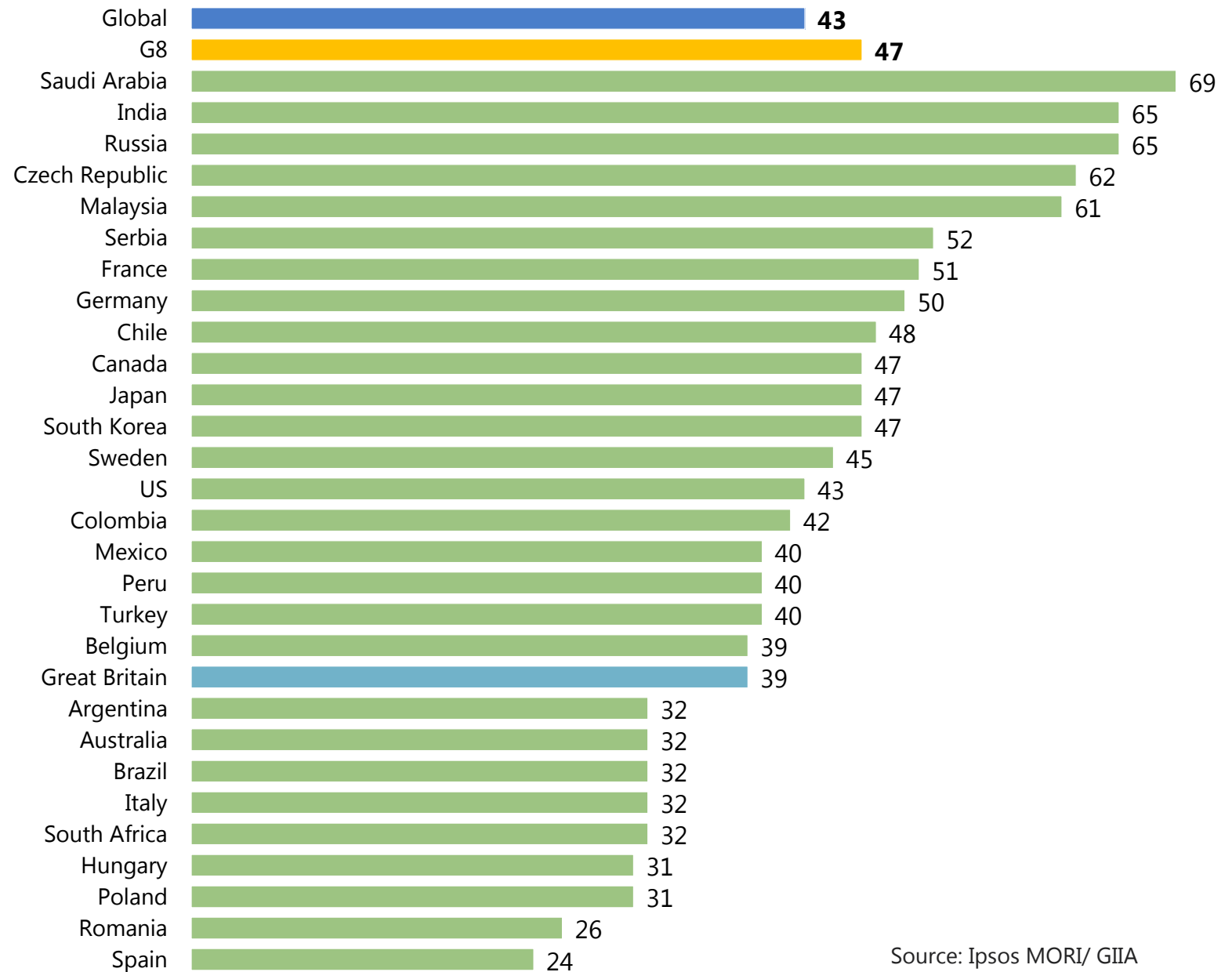
Energy

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/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

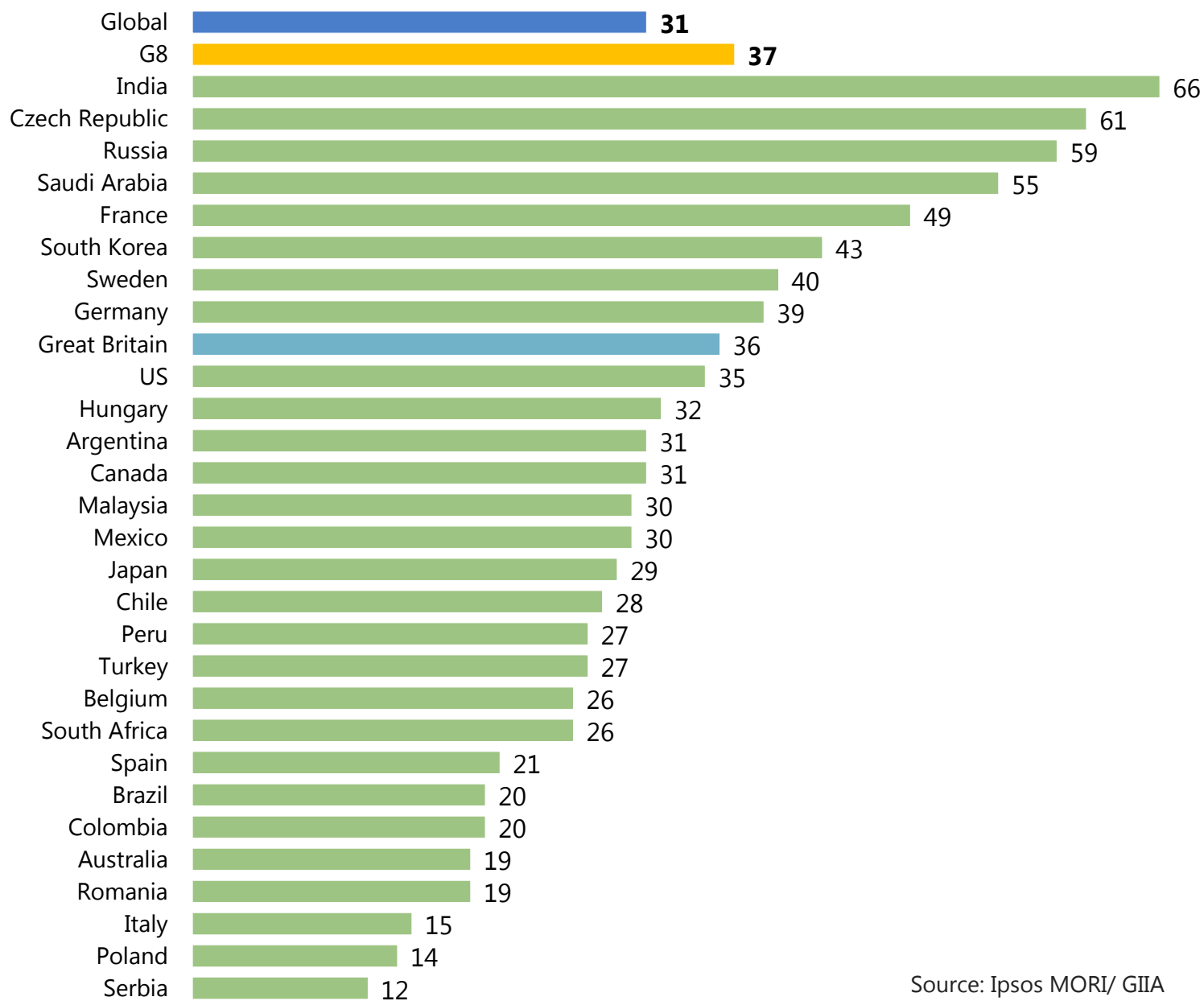
Nuclear

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/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Digital

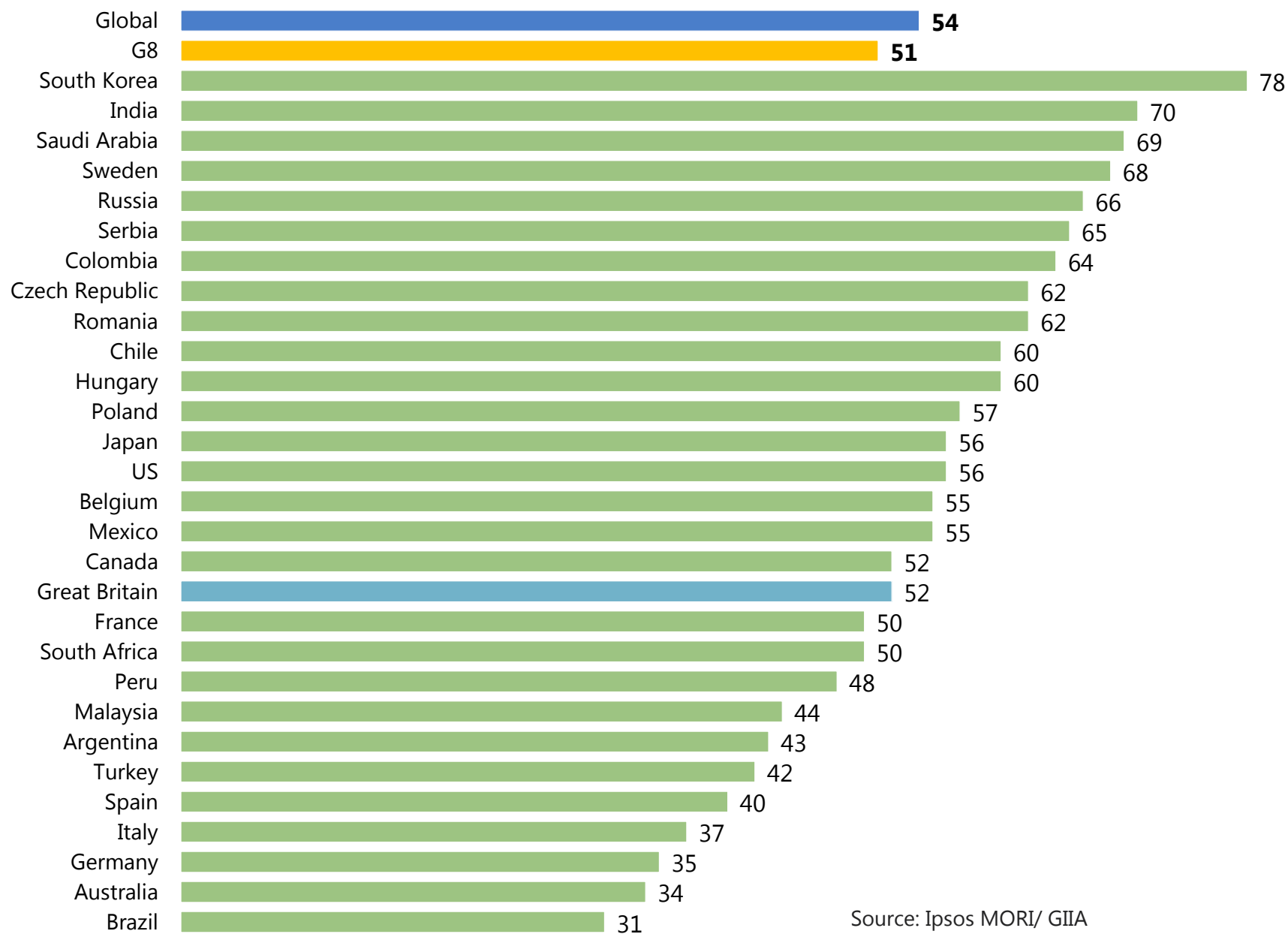
Q. These next questions are about different types of infrastructure.

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

Digital infrastructure such as high speed broadband, full fibre network (FTTP), 5G*

% very/fairly good

* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017



Source: Ipsos MORI/ GIIA

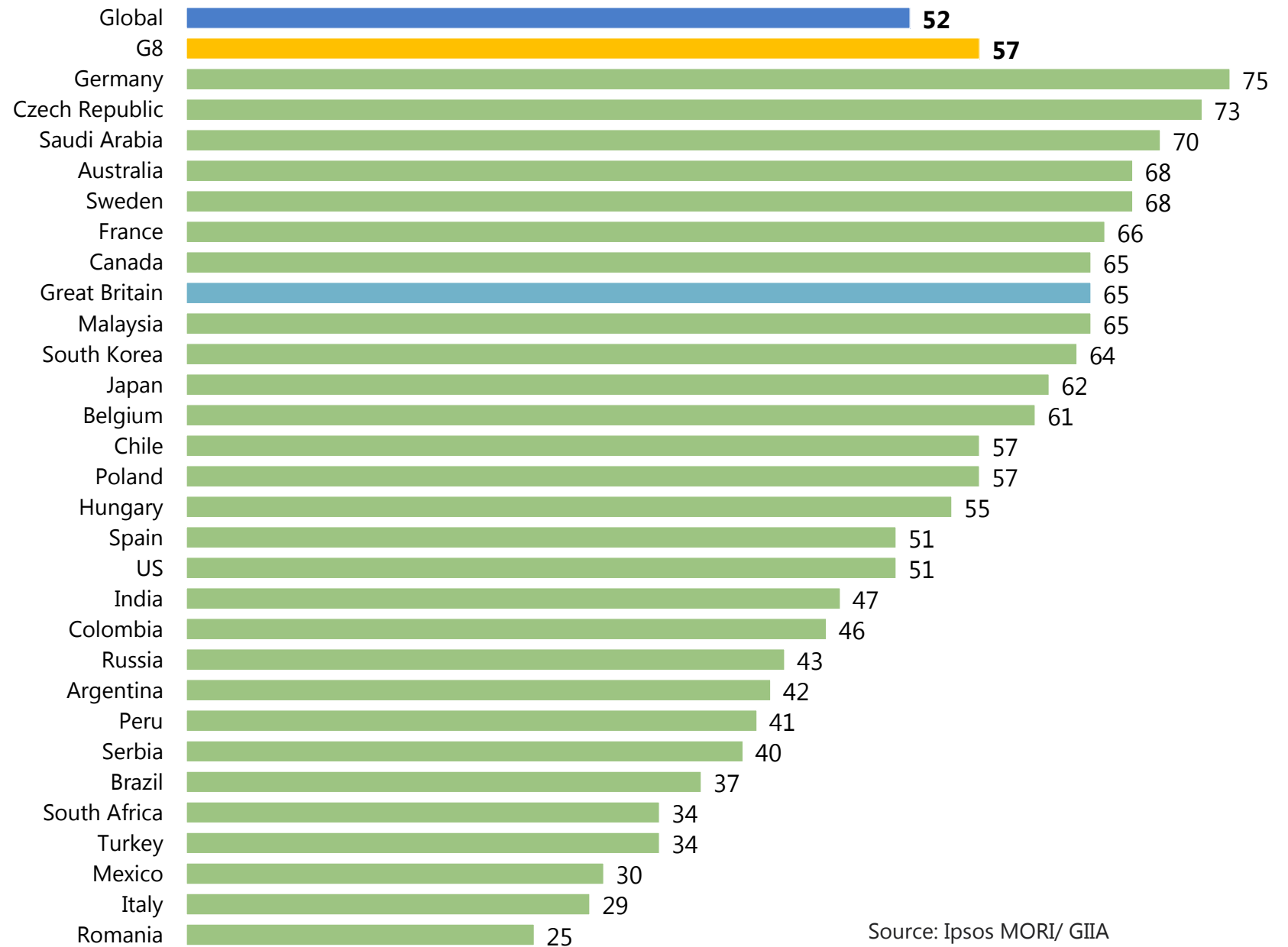
Base: 19,786 adults (online), Aug-Sept 2018

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/ GIIA

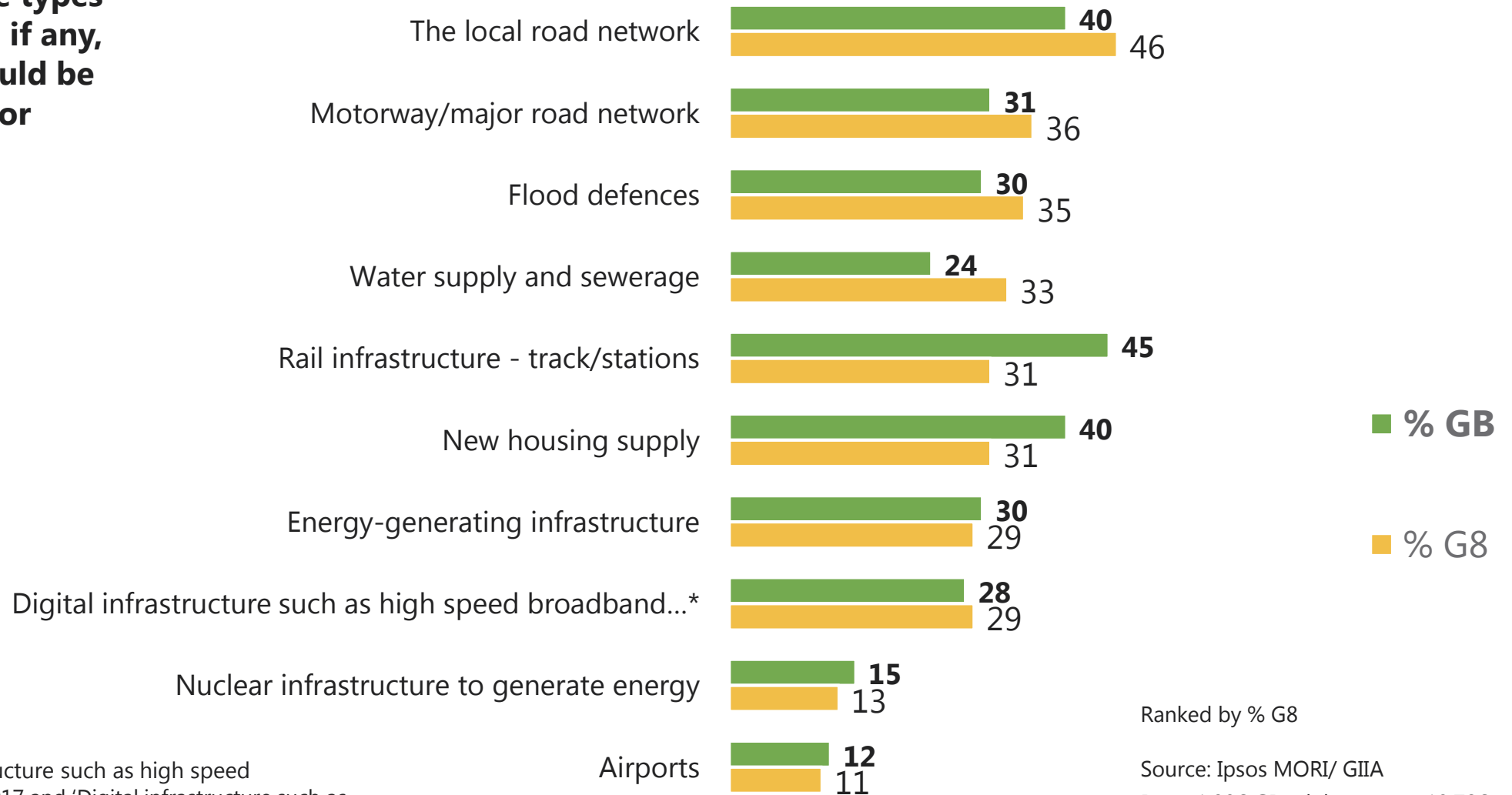
Base: 19,786 adults (online), Aug-Sept 2018

An abstract architectural line drawing on the left side of the slide. It features a series of overlapping, rectangular blocks and lines that create a sense of depth and structure, resembling a modern building or a complex shelving unit. The lines are thin and black, set against a light gray background.

Priorities

GB and G8: Priorities

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

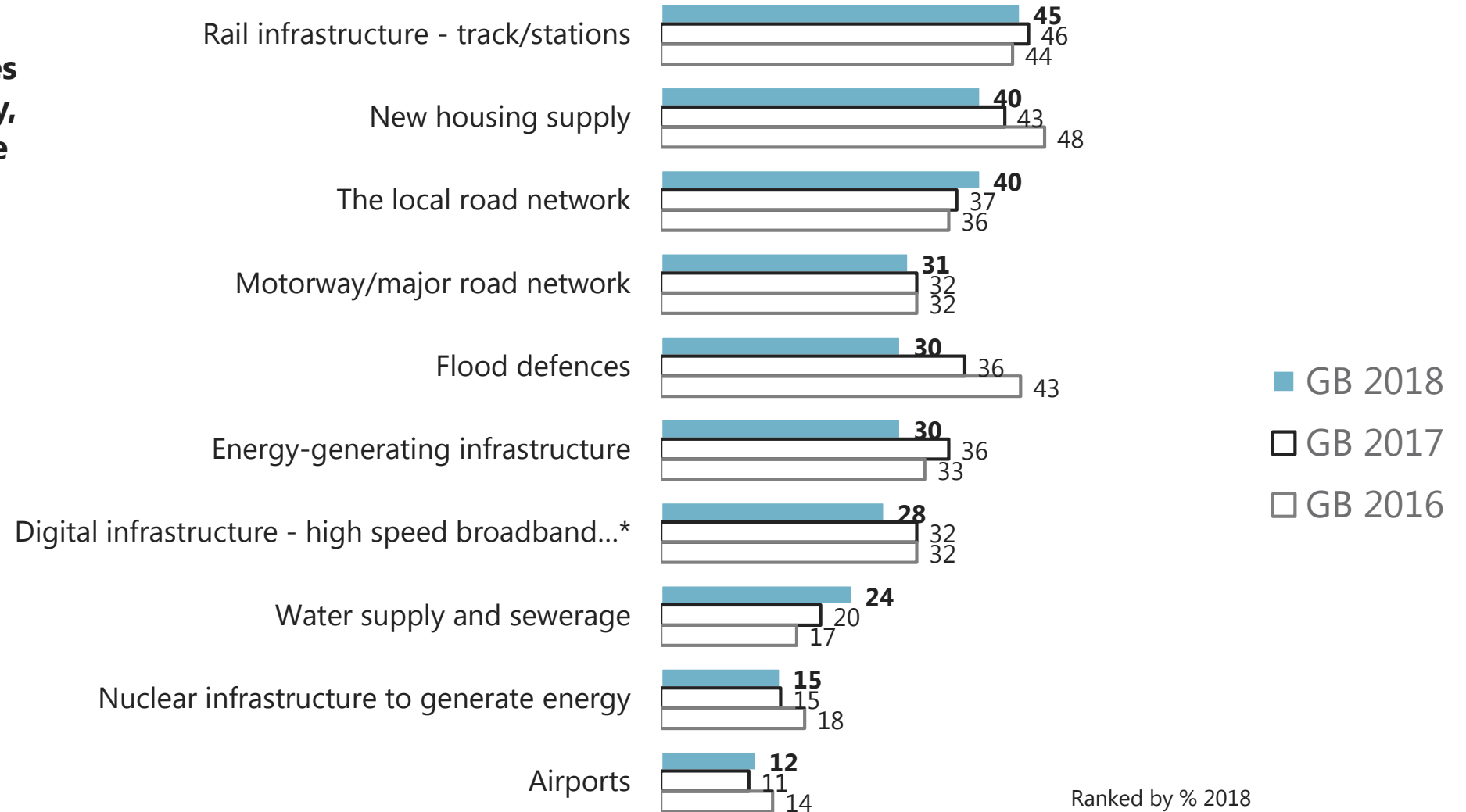


* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018

Source: Ipsos MORI/ GIIA
Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

Trends: Priorities – GB

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



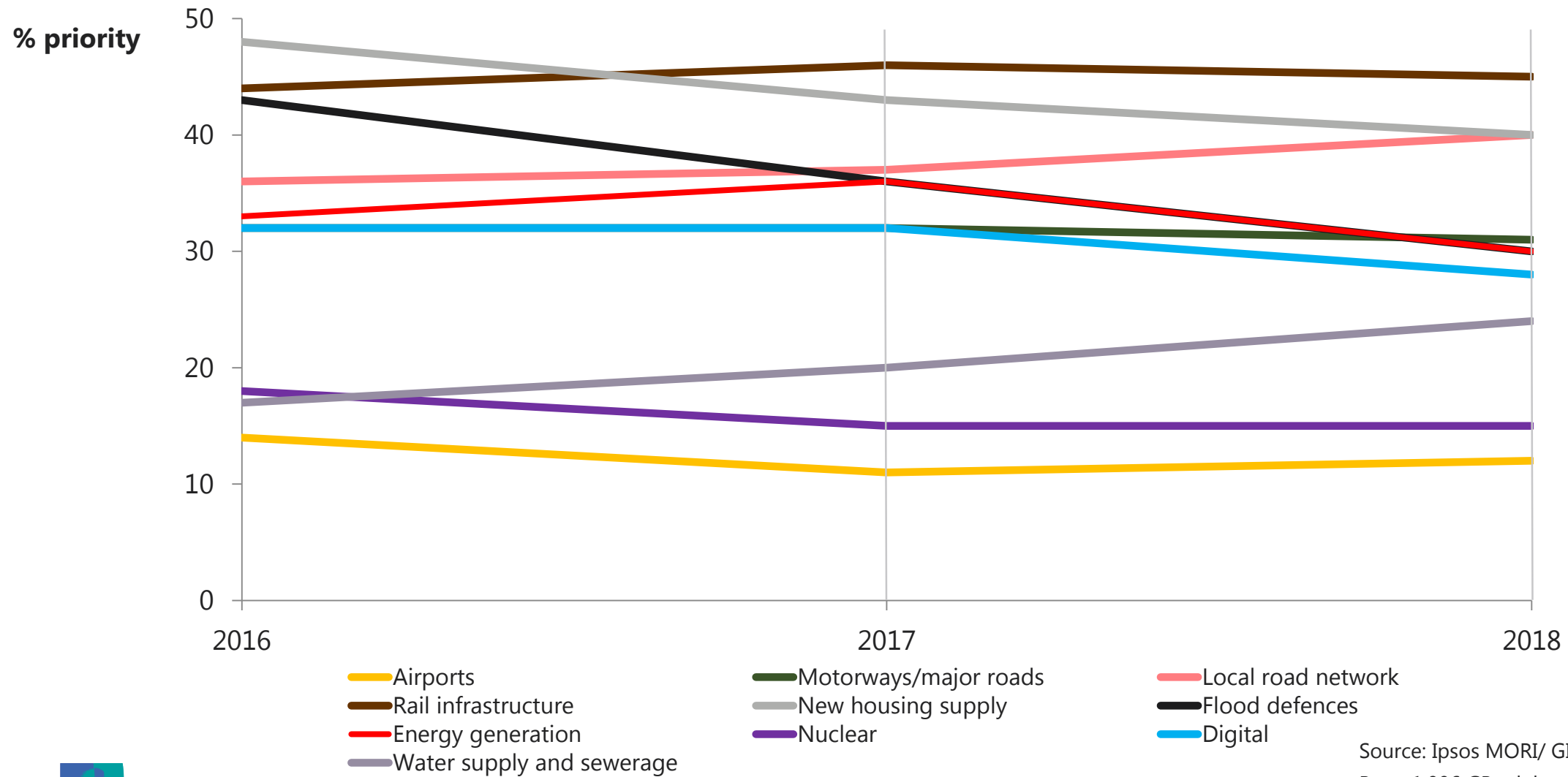
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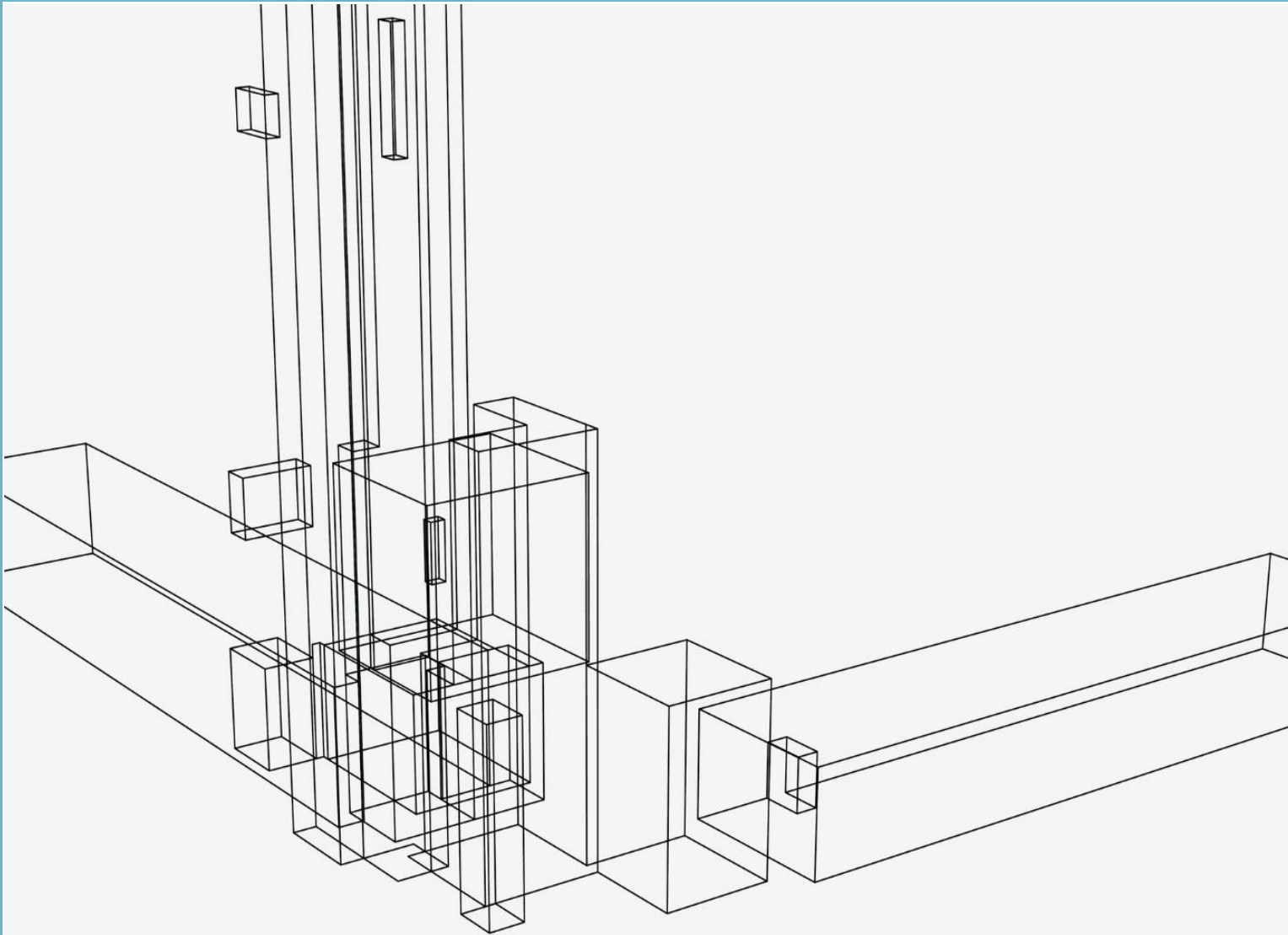
Ranked by % 2018

Source: Ipsos MORI/ GIIA

Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

Trends: Priorities – GB

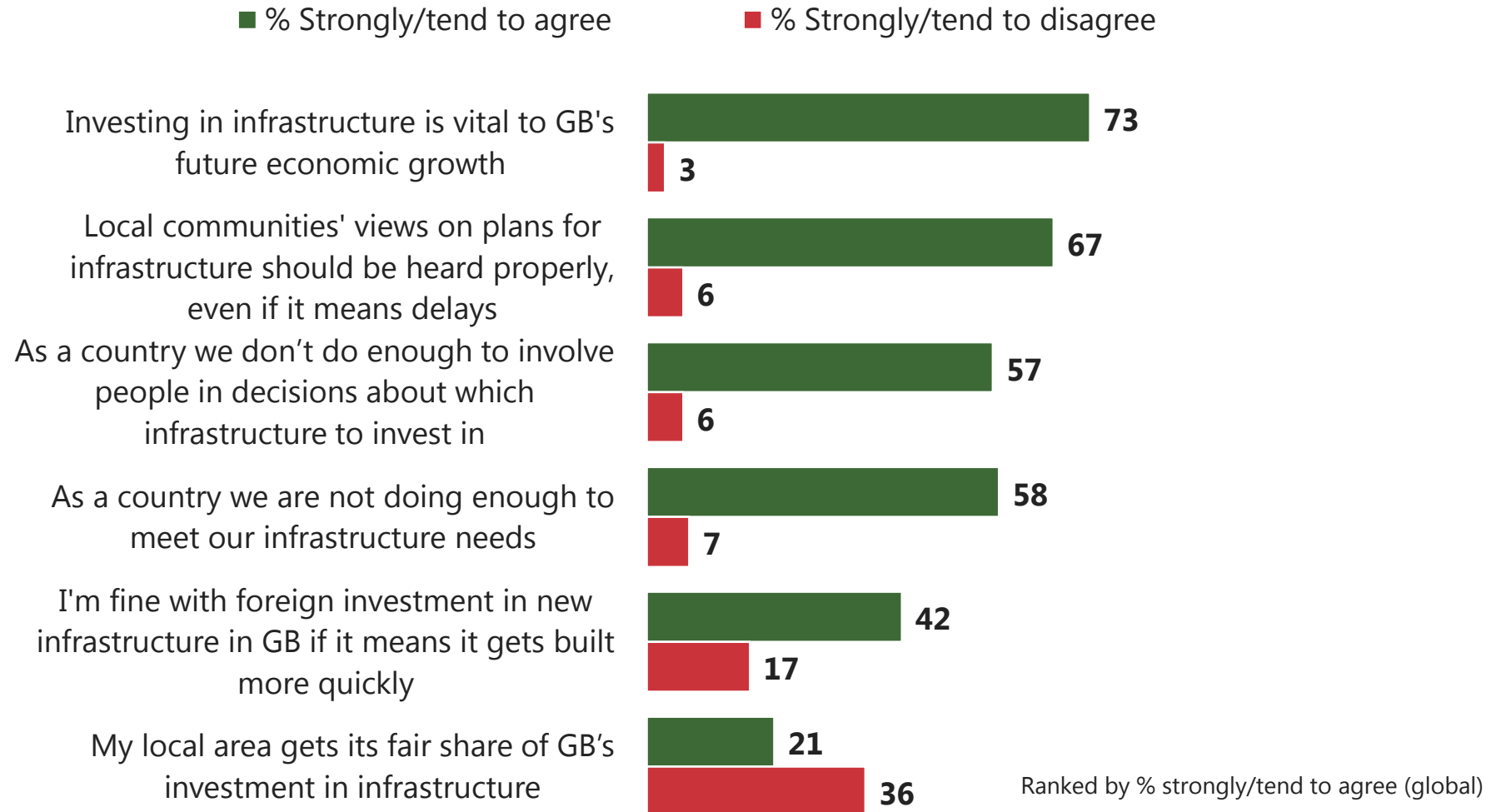




Attitudes

GB: Attitudes

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

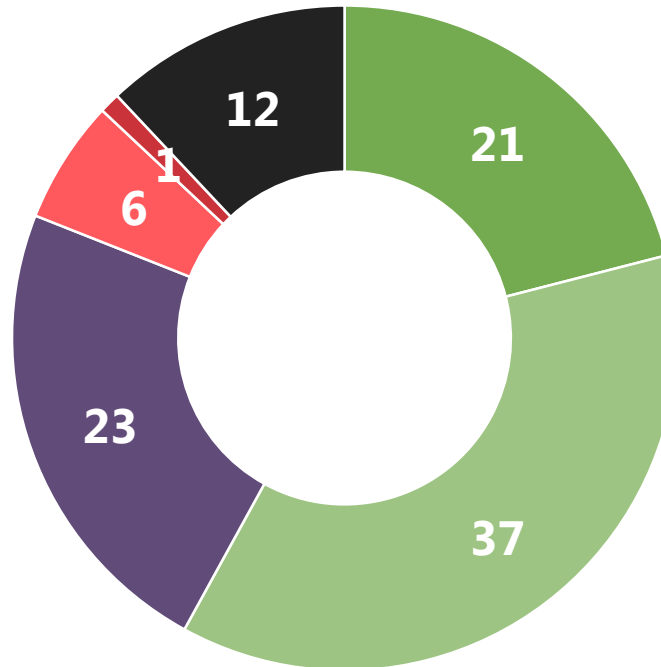


GB: Doing enough?

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

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

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



2018:

| Agree | Disagree |
|-------|----------|
| 58% | 7% |

2017:

| Agree | Disagree |
|-------|----------|
| 59% | 9% |

2016:

| Agree | Disagree |
|-------|----------|
| 60% | 8% |

Source: Ipsos MORI

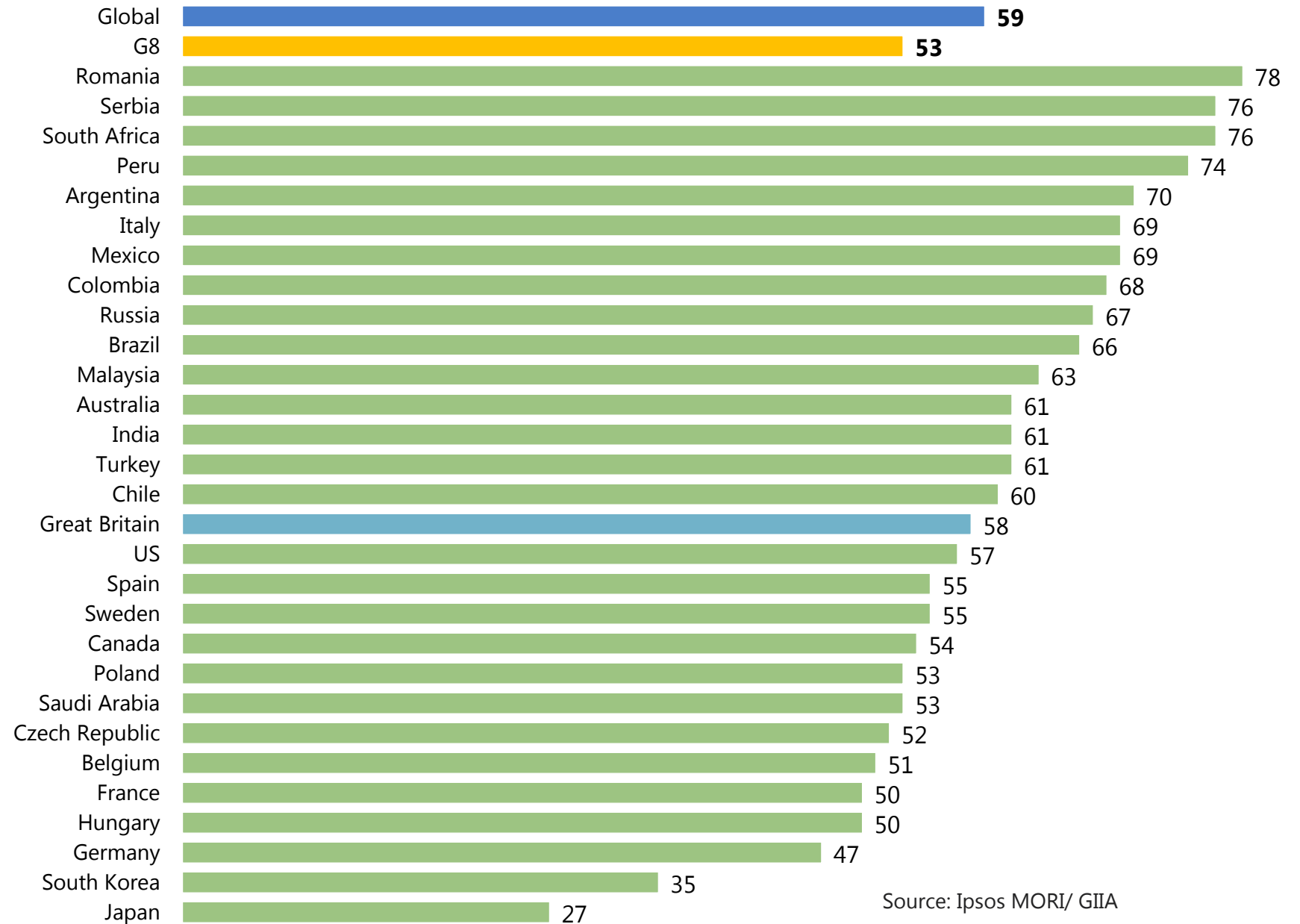
Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

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/ GIIA

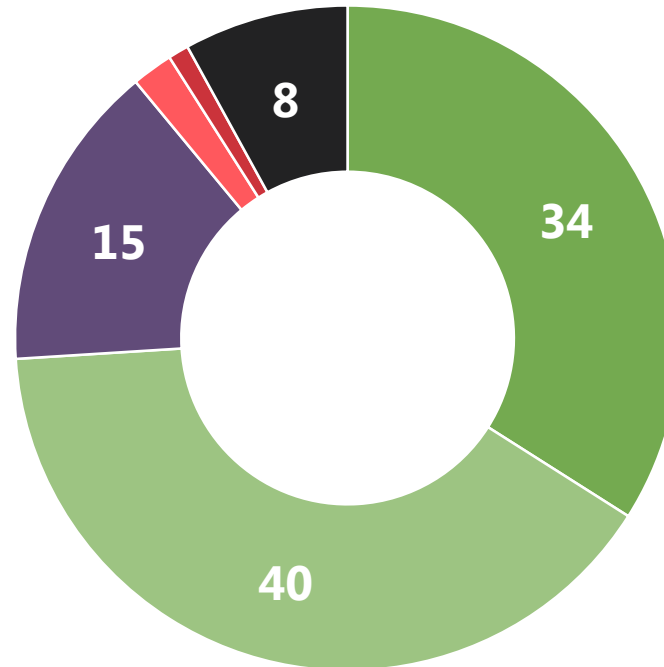
Base: 19,786 adults (online), Aug-Sept 2018

GB: Investment vital

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

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

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



2018:

| Agree | Disagree |
|-------|----------|
| 73% | 3% |

2017:

| Agree | Disagree |
|-------|----------|
| 74% | 4% |

2016:

| Agree | Disagree |
|-------|----------|
| 76% | 2% |

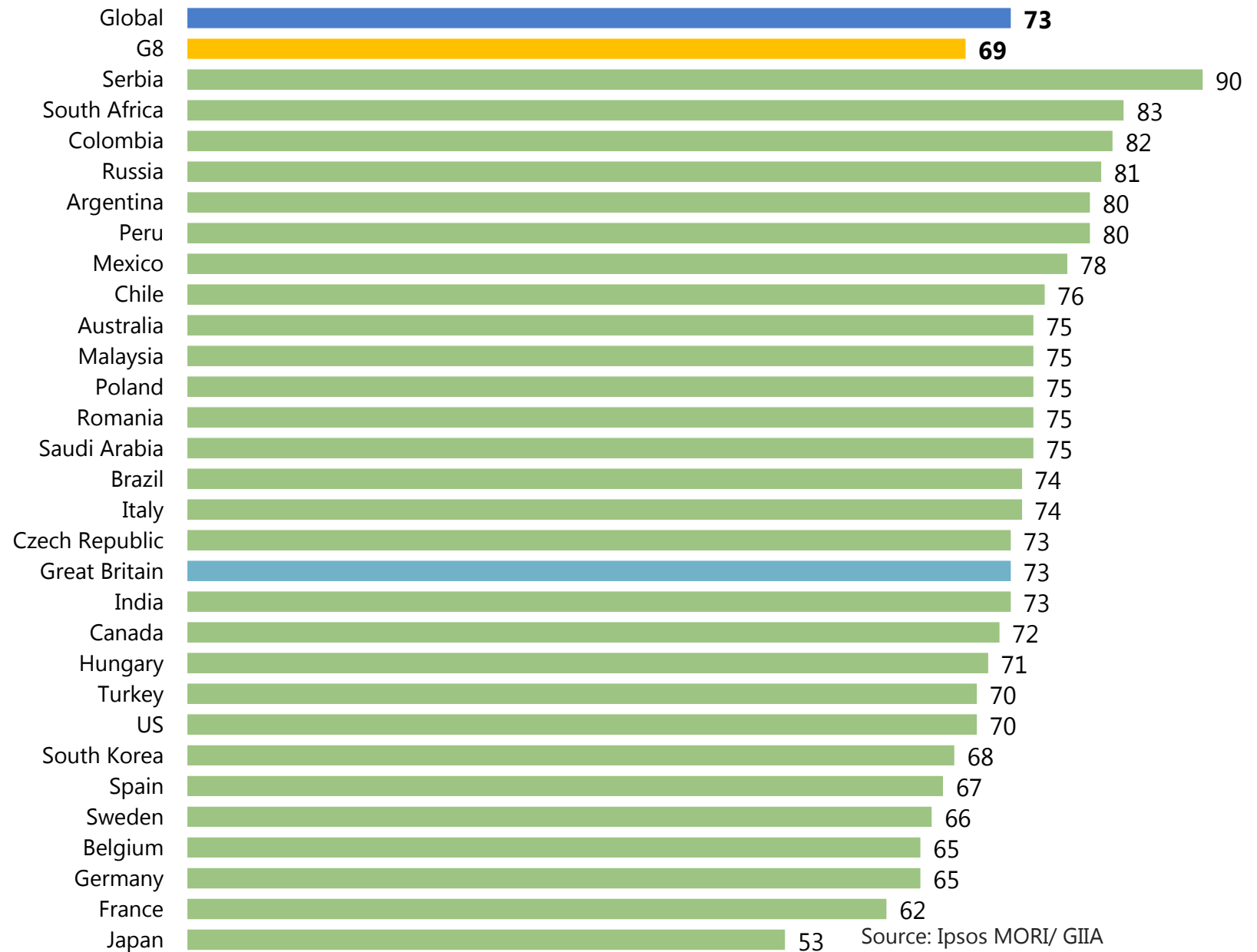
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Investment vital

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/ GIIA

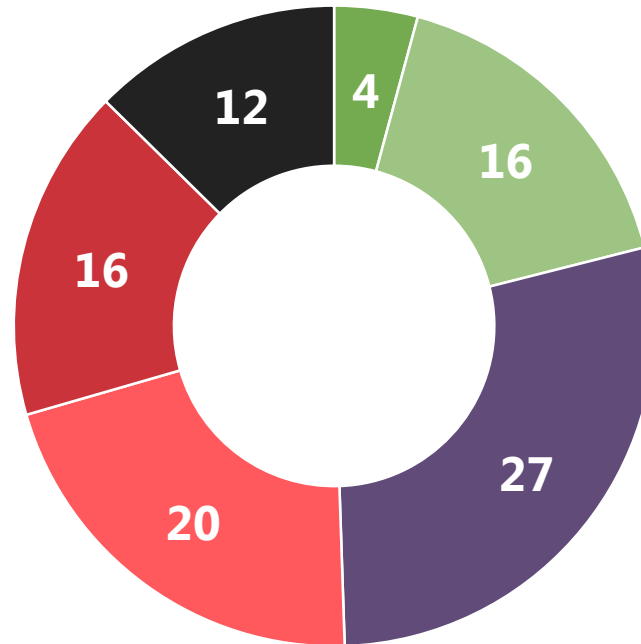
Base: 19,786 adults (online), Aug-Sept 2018

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



2018:

| Agree | Disagree |
|-------|----------|
| 21% | 36% |

2017:

| Agree | Disagree |
|-------|----------|
| 23% | 37% |

Source: Ipsos MORI/ GIIA

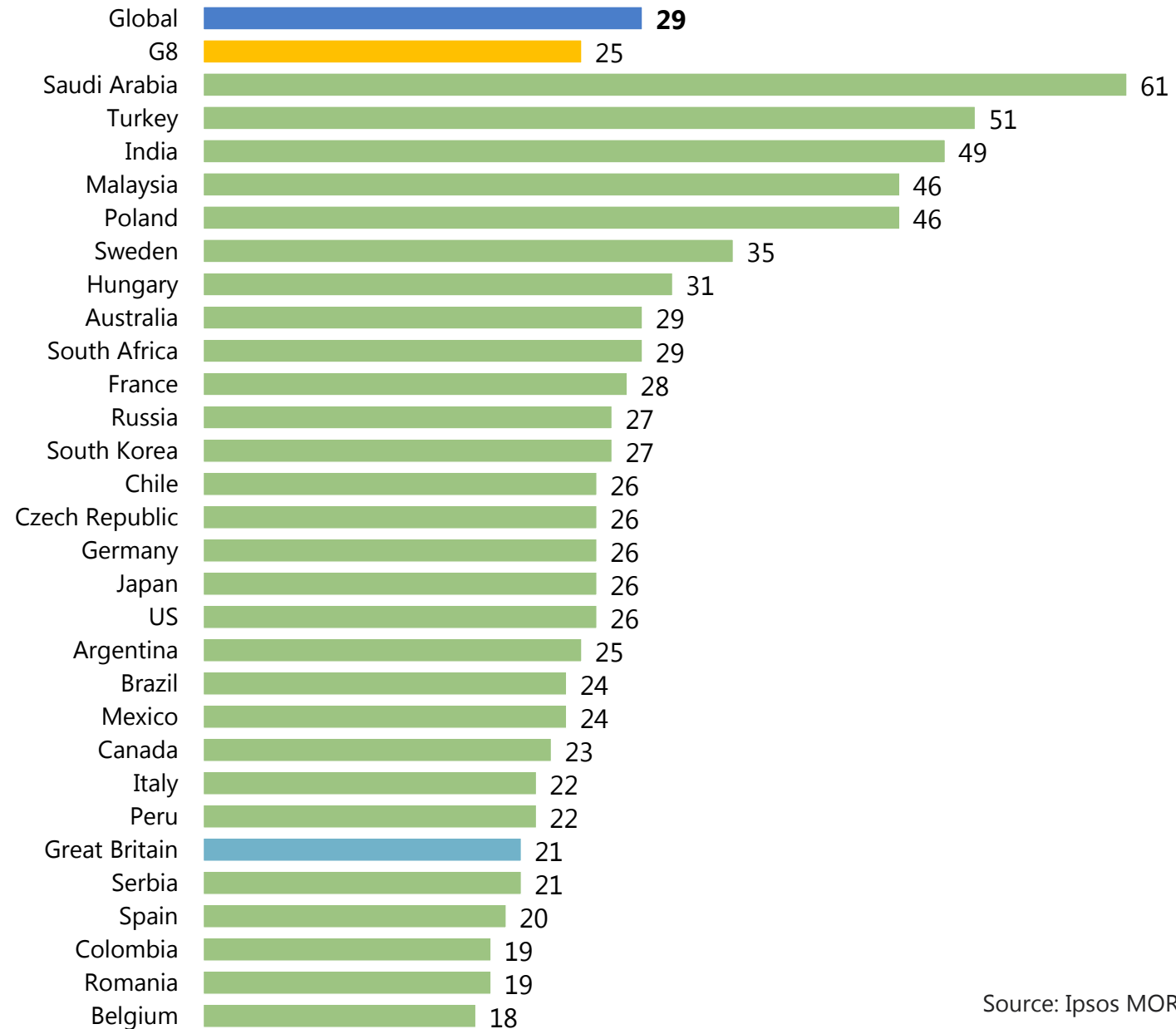
Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

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/ GIIA

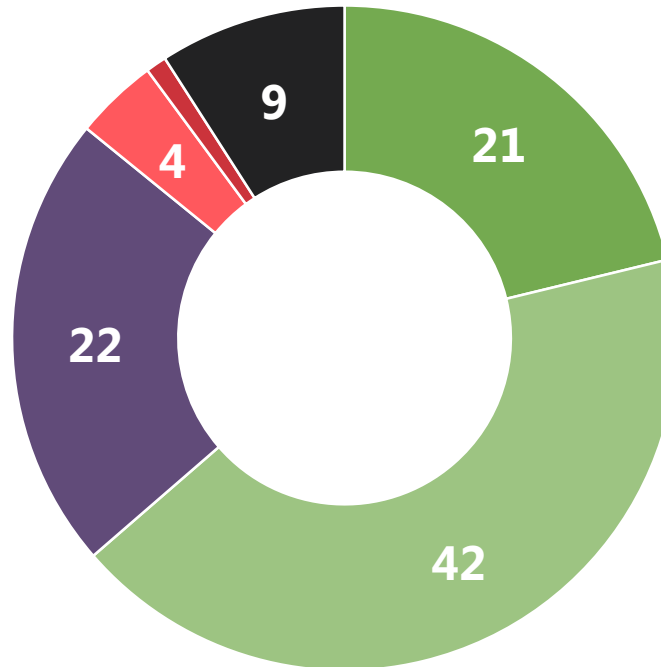
Base: 19,786 adults (online), Aug-Sept 2018

GB: Local communities

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

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



2018:

| Agree | Disagree |
|-------|----------|
| 63% | 6% |

2016:

| Agree | Disagree |
|-------|----------|
| 67% | 6% |

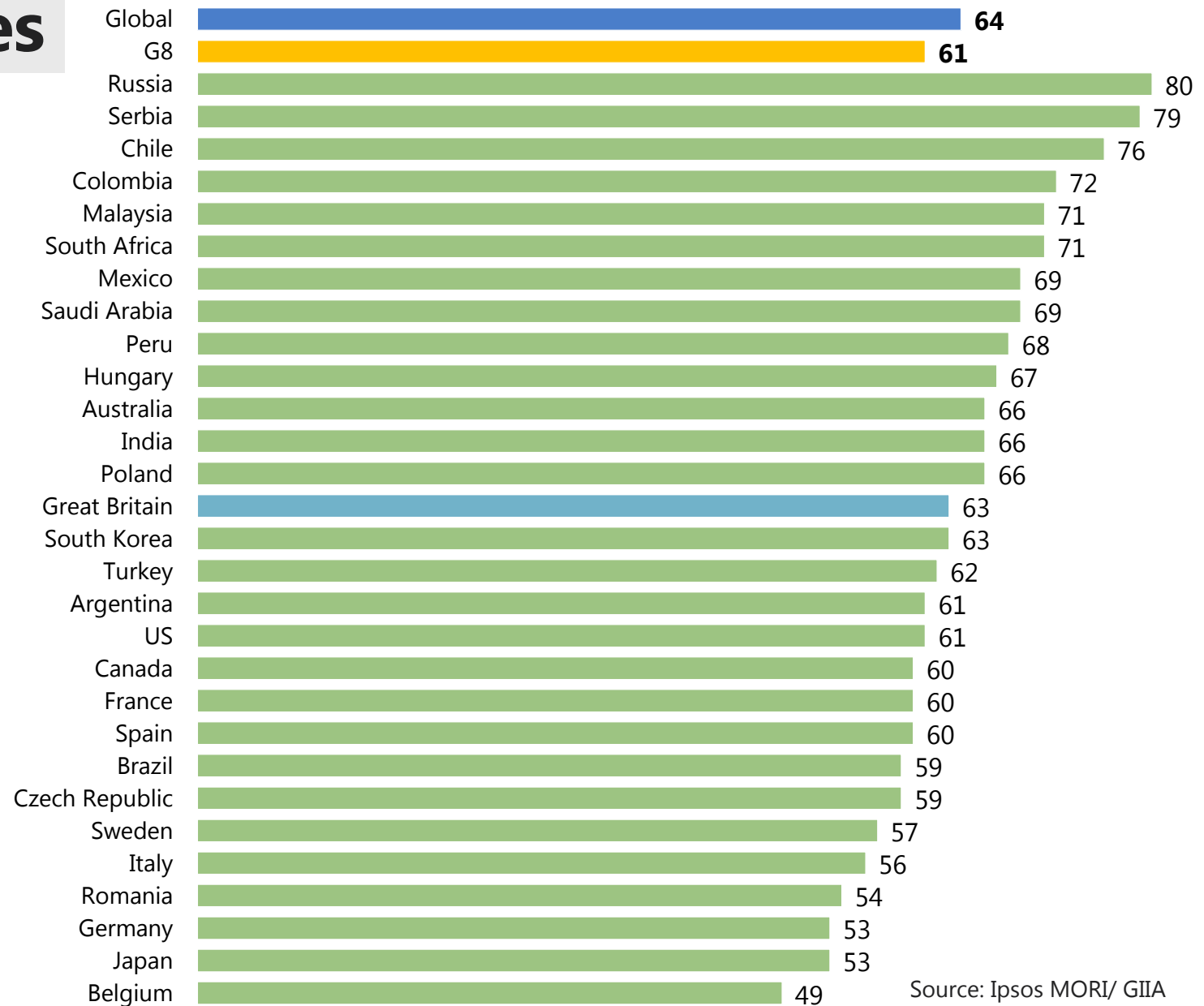
Source: Ipsos MORI/ GIIA
Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

Local communities

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

% strongly/tend to agree



Source: Ipsos MORI/ GIIA

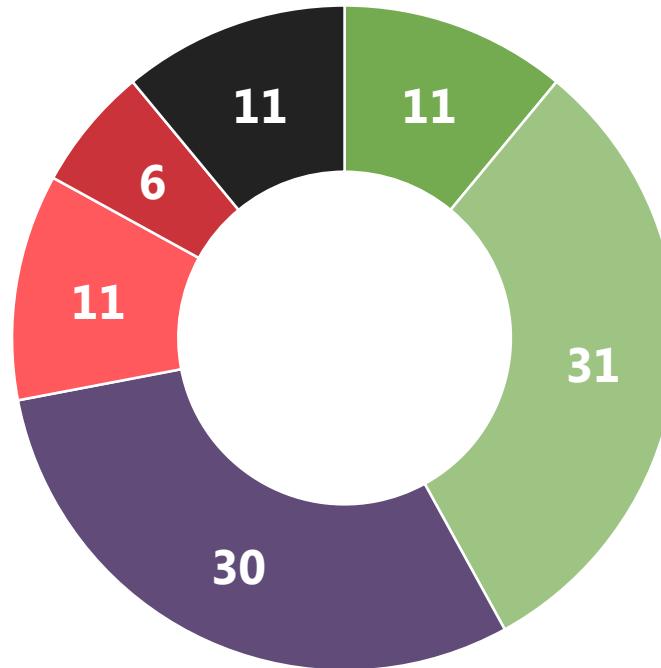
Base: 19,786 adults (online), Aug-Sept 2018

GB: Foreign investment

Q. 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

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



2018:

| Agree | Disagree |
|-------|----------|
| 42% | 17% |

2016:

| Agree | Disagree |
|-------|----------|
| 42% | 20% |

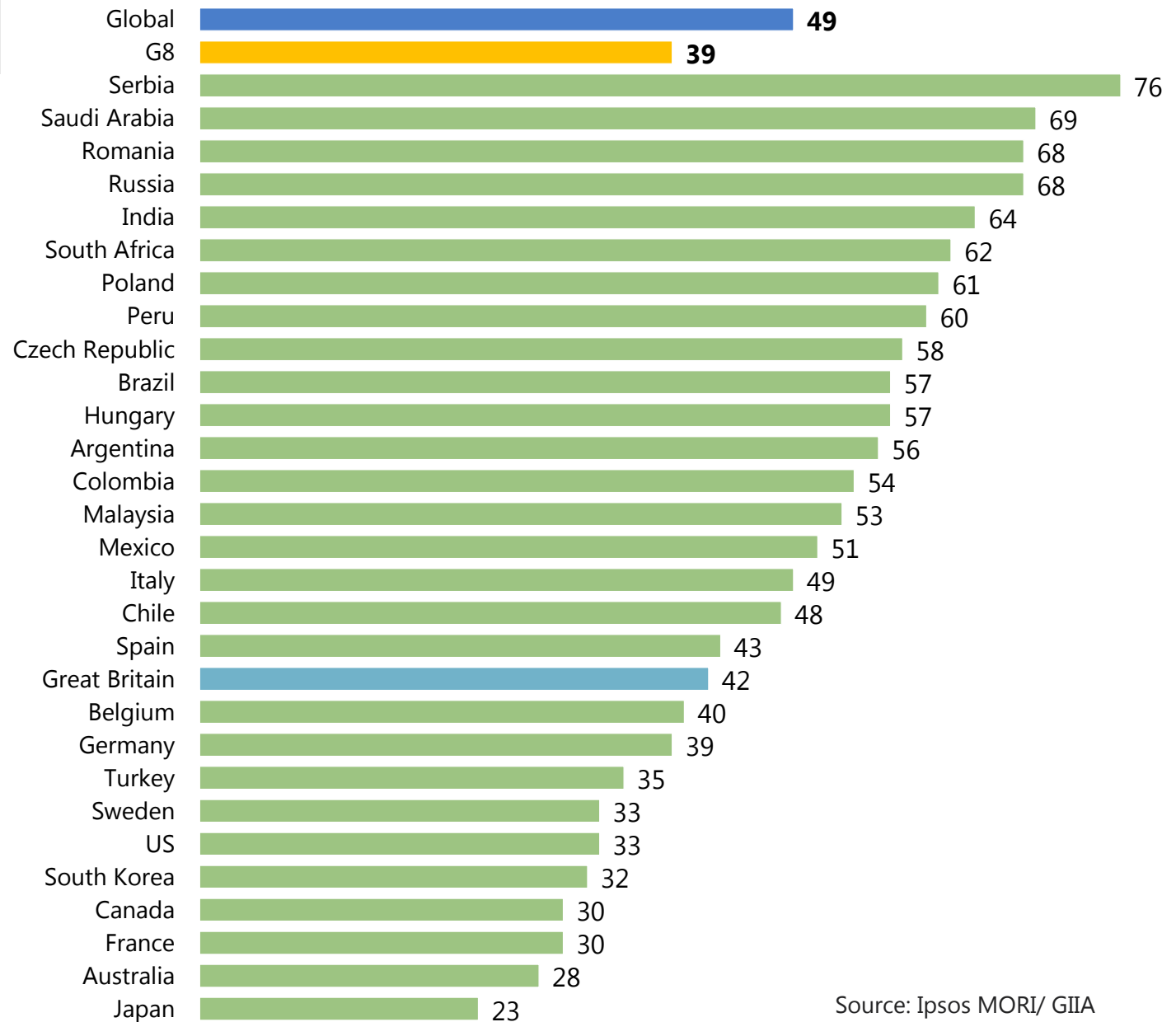
Source: Ipsos MORI/ GIIA
Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

Foreign investment

Q. 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

% strongly/tend to agree



Source: Ipsos MORI/ GIIA

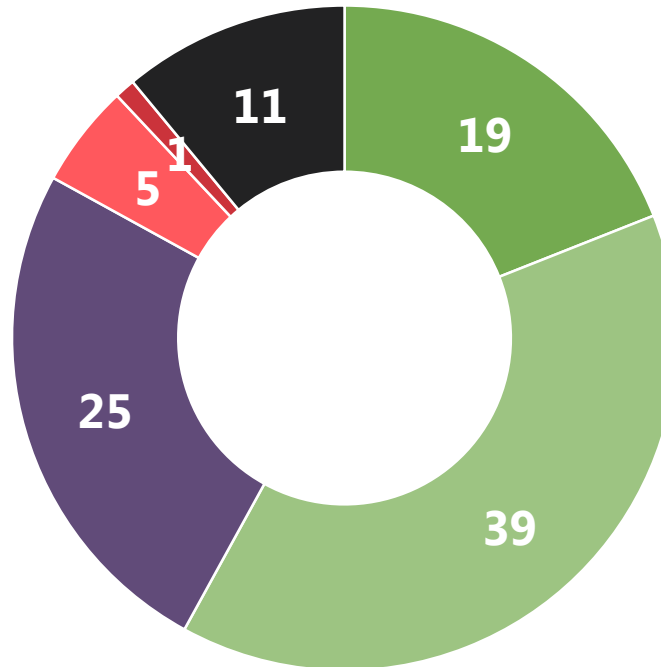
Base: 19,786 adults (online), Aug-Sept 2018

GB: Involving people

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

As a country we don't do enough to involve people in decisions about which infrastructure to invest in

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



2018:

| Agree | Disagree |
|-------|----------|
| 57% | 6% |

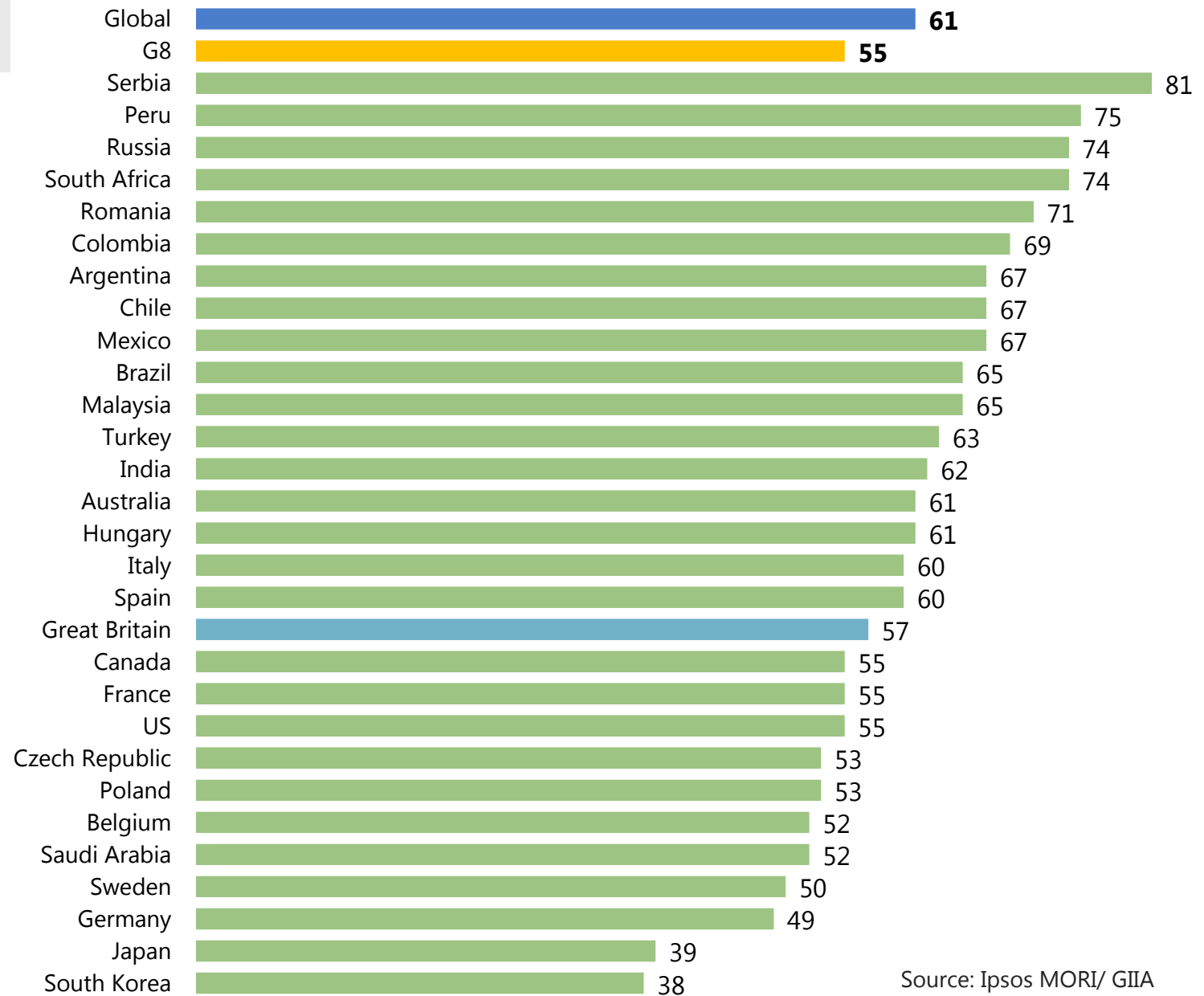
Source: Ipsos MORI/ GIIA
Base: 1,006 GB adults among 19,786 adults (online), Aug-Sept 2018

Involving people

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

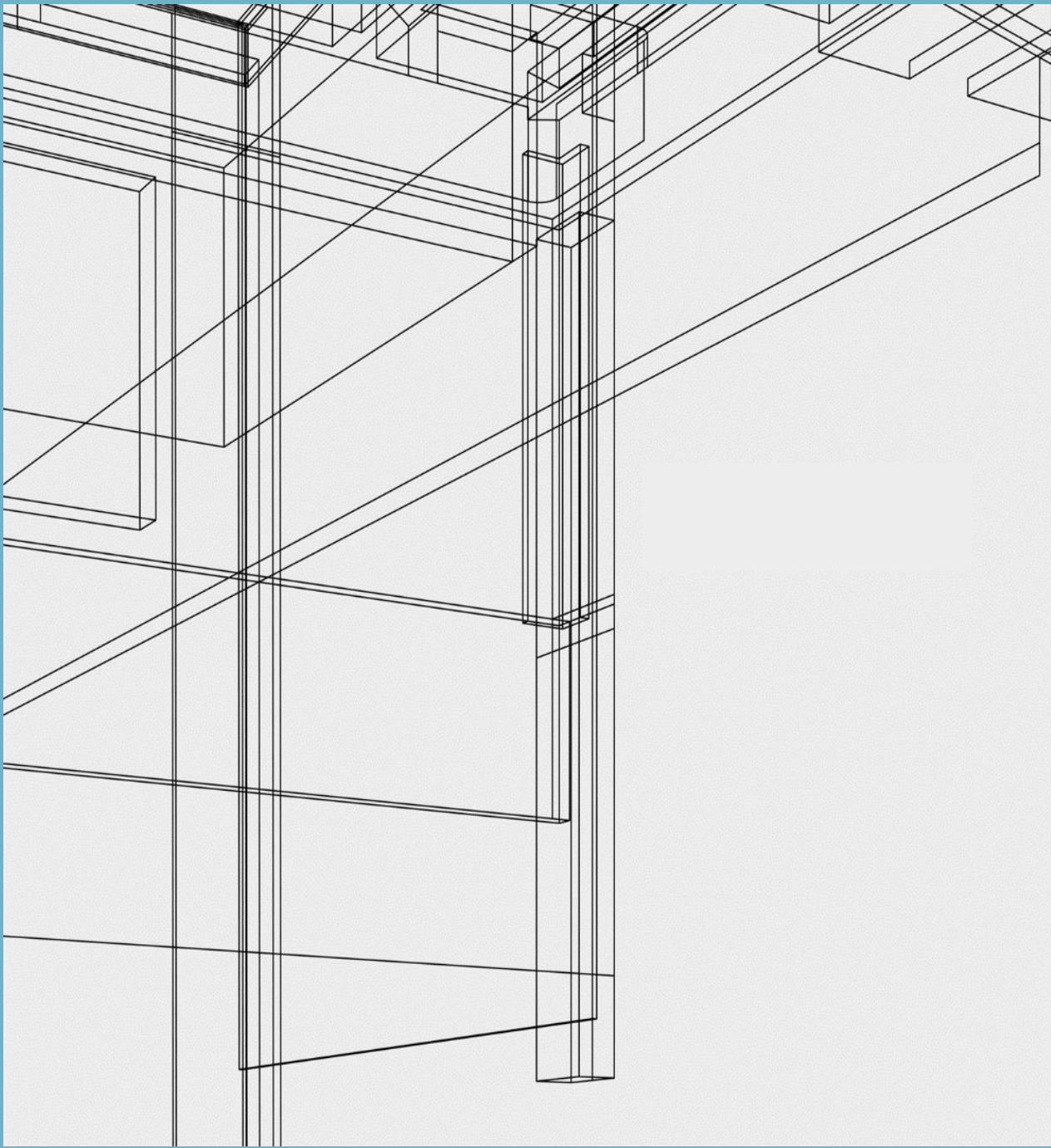
As a country we don't do enough to involve people in decisions about which infrastructure to invest in

% strongly/tend to agree



Source: Ipsos MORI/ GIIA

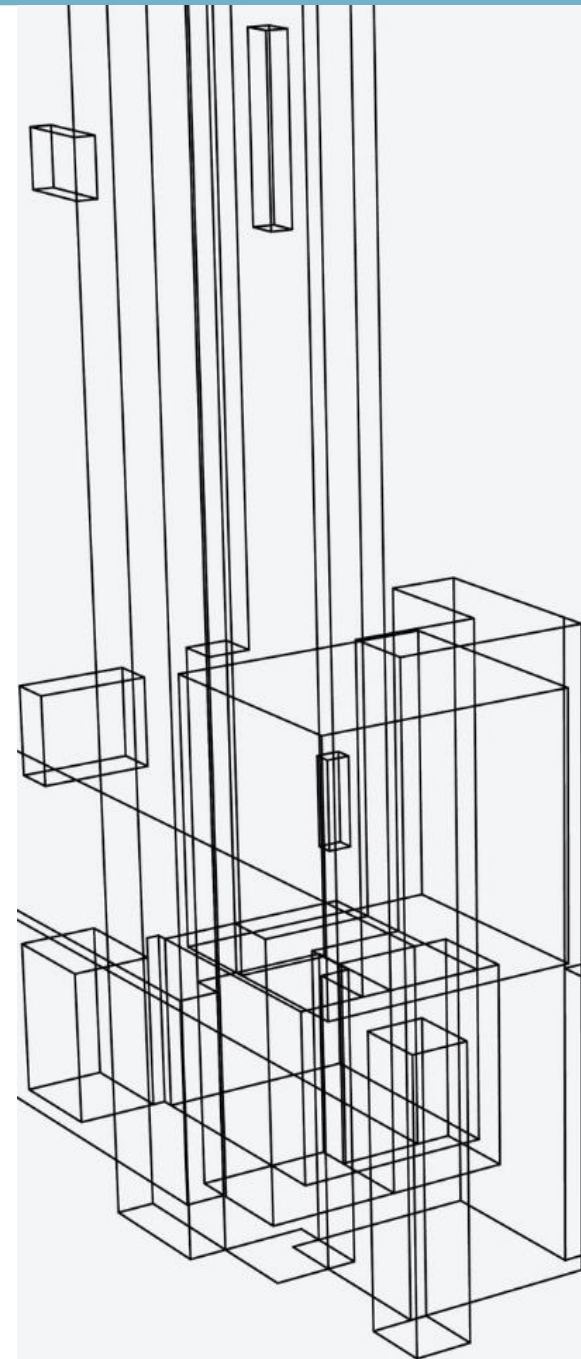
Base: 19,786 adults (online), Aug-Sept 2018



Key findings

Key findings

- Overall satisfaction with infrastructure has **fallen five points** in Britain since 2017, in line with similar shifts in sentiment globally and within G8 nations.
- Britons are least satisfied with **new housing supply** and **rail**, but most satisfied with **airports** and **water supply and sewerage** (although both of these have seen dips in ratings since 2017).
- Ratings of **rail** infrastructure and **new housing supply** compare least favourably internationally, while **water supply and sewerage** compares best.
- Rail is the number one **infrastructure priority** for Britons, with housing supply and local road networks tied in second place.
- The British public is similar attitudinally to people in other parts of the world. While we are more comfortable with **foreign investment** compared to several other G8 nations, but least sure that our **local area gets its fair share** of the country's investment in infrastructure.





Further information



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