# Global Infrastructure Index

## Public satisfaction and priorities – 2019

### Great Britain (GB)
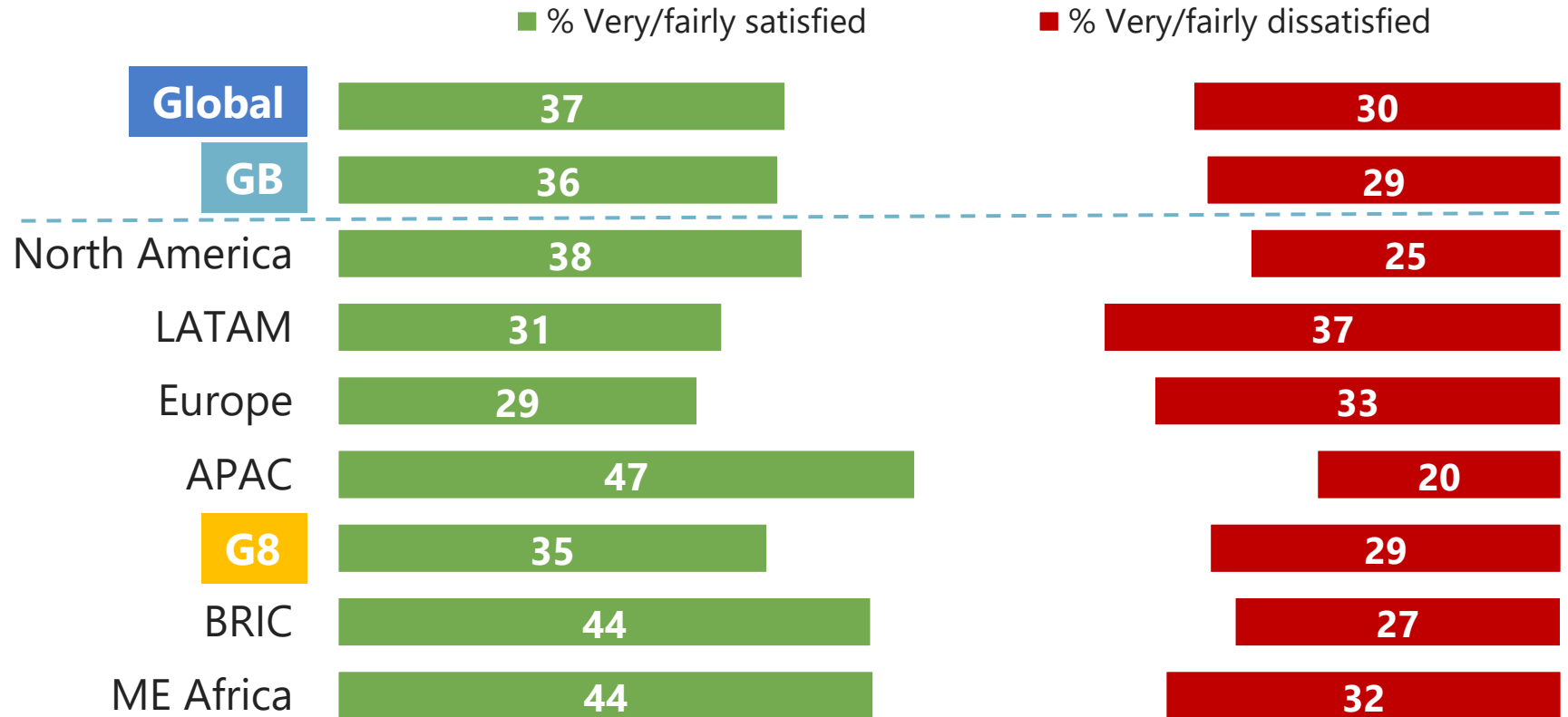
Global Infrastructure Investor Association

# Overall ratings

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

**By infrastructure we 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**

■ % Very/fairly satisfied          ■ % Very/fairly dissatisfied

| | % Very/fairly satisfied | % Very/fairly dissatisfied |
|---|---|---|
| Global | 37 | 30 |
| GB | 36 | 29 |
| North America | 38 | 25 |
| LATAM | 31 | 37 |
| Europe | 29 | 33 |
| APAC | 47 | 20 |
| G8 | 35 | 29 |
| BRIC | 44 | 27 |
| ME Africa | 44 | 32 |

Source: Ipsos/ GIIA

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019
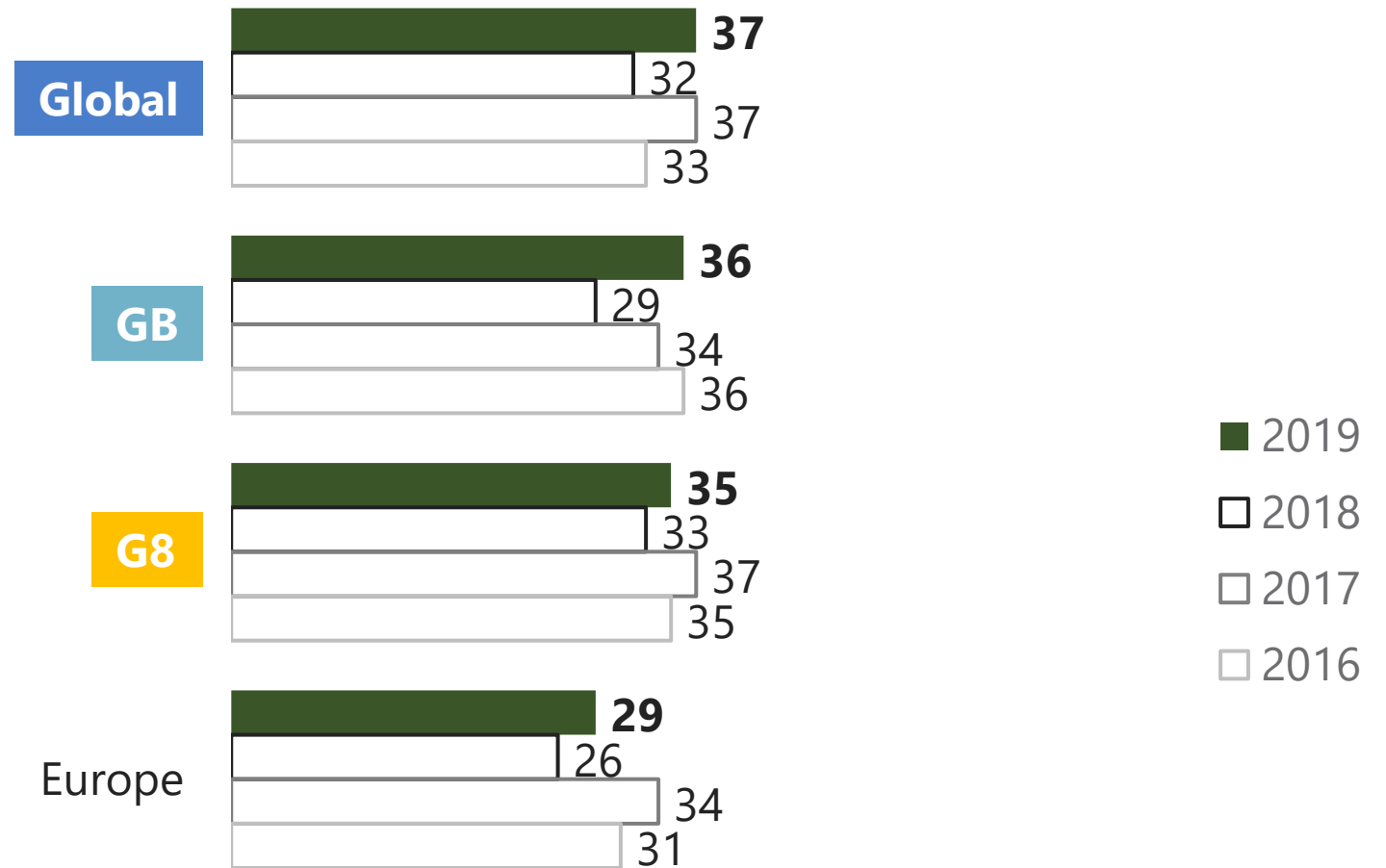
2

# Trends: Overall ratings

N.B. the 2016-19 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.

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

**By infrastructure we 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**

**Global**
- 37
- 32
- 37
- 33

**GB**
- 36
- 29
- 34
- 36

**G8**
- 35
- 33
- 37
- 35

Europe
- 29
- 26
- 34
- 31

■ 2019
□ 2018
□ 2017
□ 2016

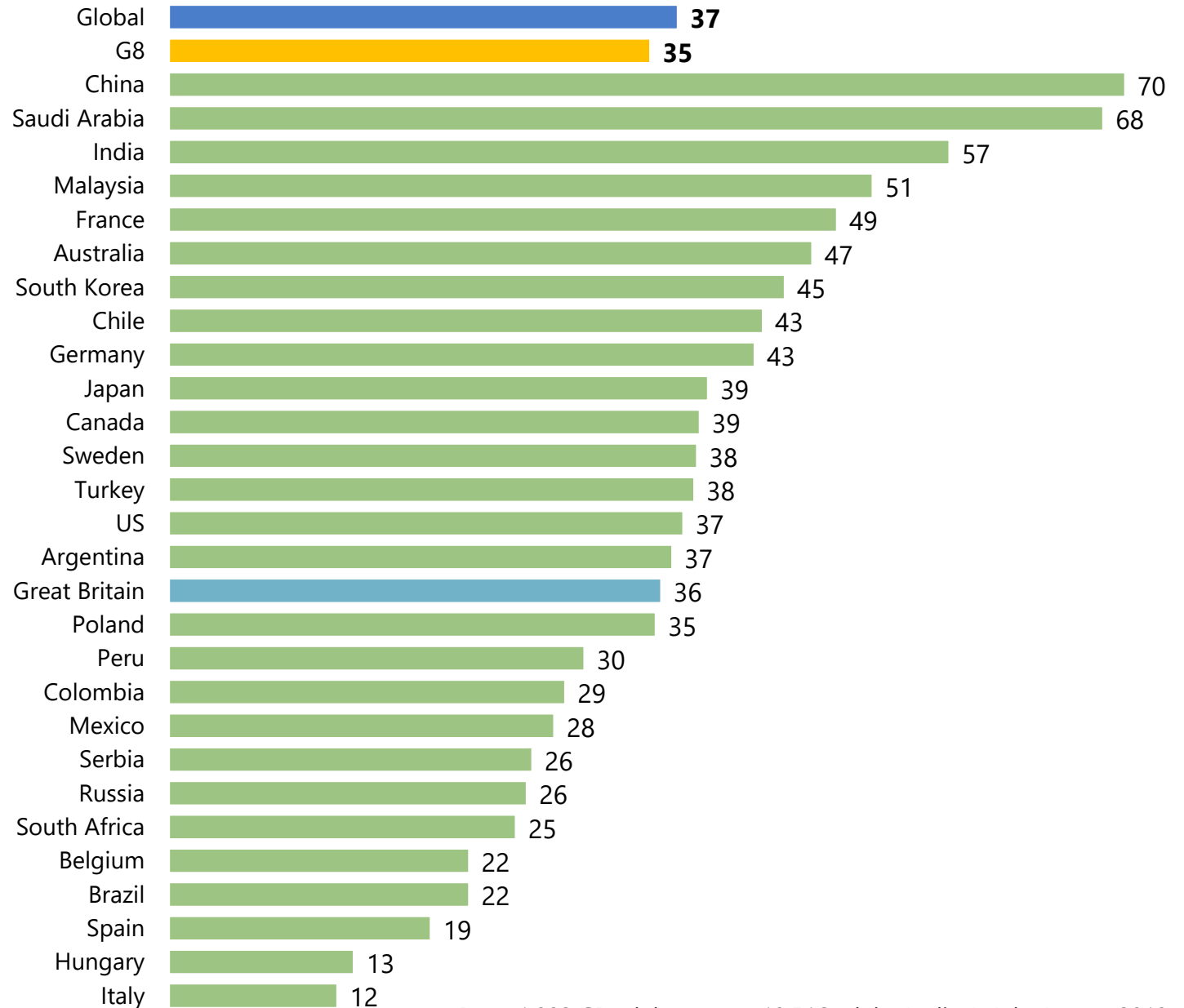Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# Overall ratings

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

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

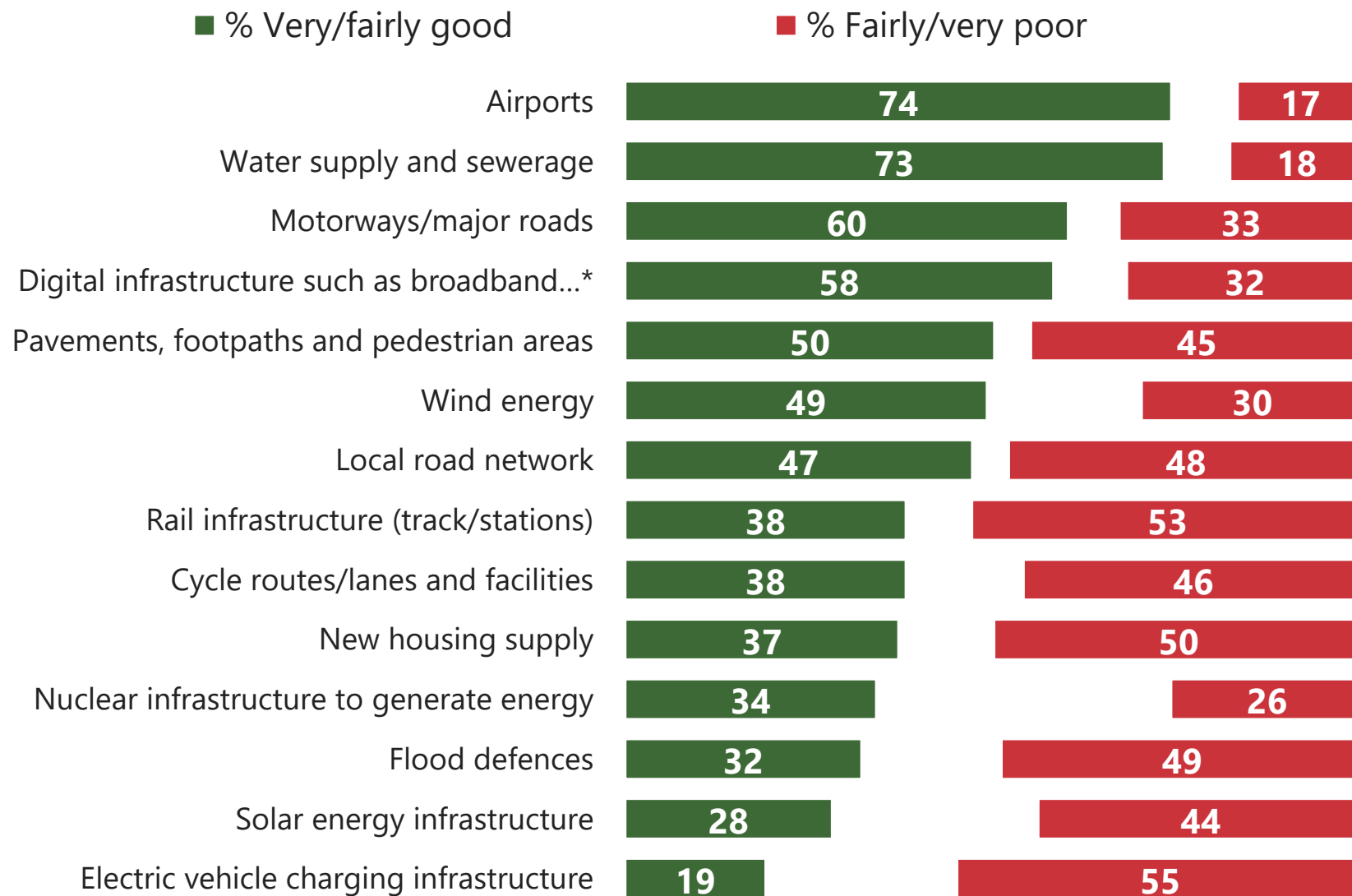**Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?**

**% very/fairly satisfied**

| Country | Value |
|---|---|
| Global | 37 |
| G8 | 35 |
| China | 70 |
| Saudi Arabia | 68 |
| India | 57 |
| Malaysia | 51 |
| France | 49 |
| Australia | 47 |
| South Korea | 45 |
| Chile | 43 |
| Germany | 43 |
| Japan | 39 |
| Canada | 39 |
| Sweden | 38 |
| Turkey | 38 |
| US | 37 |
| Argentina | 37 |
| Great Britain | 36 |
| Poland | 35 |
| Peru | 30 |
| Colombia | 29 |
| Mexico | 28 |
| Serbia | 26 |
| Russia | 26 |
| South Africa | 25 |
| Belgium | 22 |
| Brazil | 22 |
| Spain | 19 |
| Hungary | 13 |
| Italy | 12 |

Source: Ipsos/ GIIA

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# GB: Sectors

■ % Very/fairly good          ■ % Fairly/very poor

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

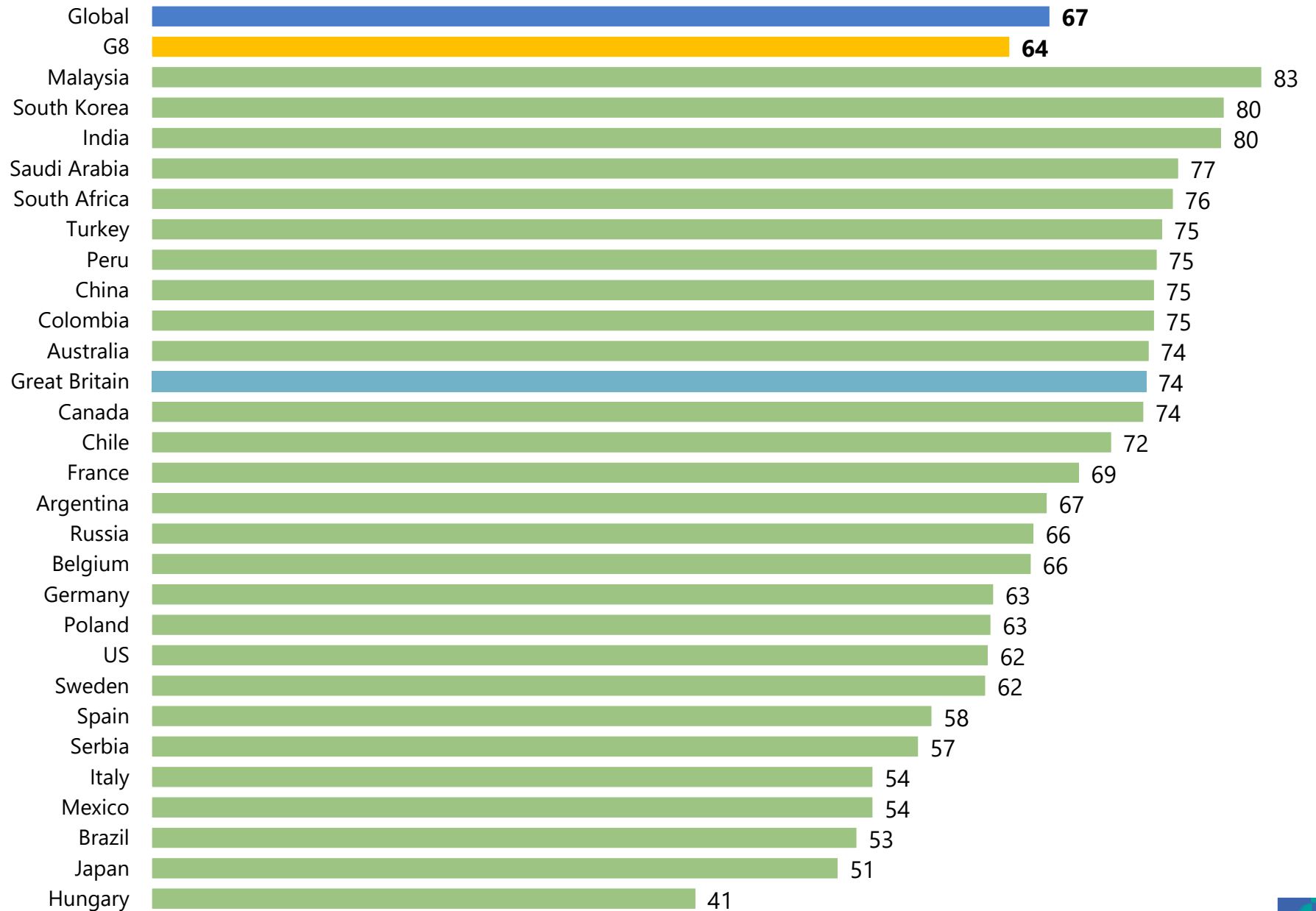**Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...**

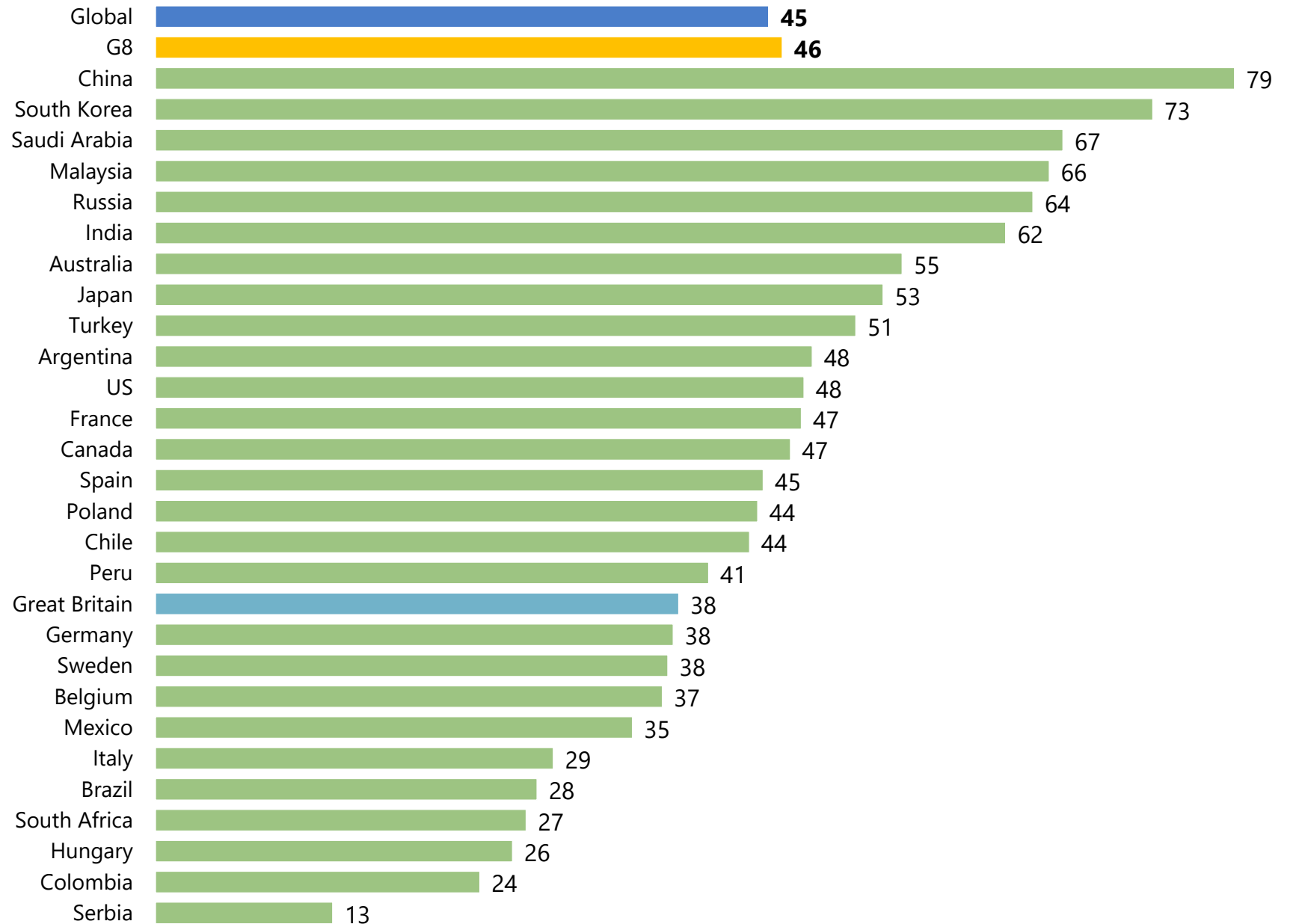| Sector | % Very/fairly good | % Fairly/very poor |
|---|---|---|
| Airports | 74 | 17 |
| Water supply and sewerage | 73 | 18 |
| Motorways/major roads | 60 | 33 |
| Digital infrastructure such as broadband...* | 58 | 32 |
| Pavements, footpaths and pedestrian areas | 50 | 45 |
| Wind energy | 49 | 30 |
| Local road network | 47 | 48 |
| Rail infrastructure (track/stations) | 38 | 53 |
| Cycle routes/lanes and facilities | 38 | 46 |
| New housing supply | 37 | 50 |
| Nuclear infrastructure to generate energy | 34 | 26 |
| Flood defences | 32 | 49 |
| Solar energy infrastructure | 28 | 44 |
| Electric vehicle charging infrastructure | 19 | 55 |

Ranked by % very/fairly good

Ipsos

# 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 |



| Country | Value |
|---|---|
| Global | 67 |
| G8 | 64 |
| Malaysia | 83 |
| South Korea | 80 |
| India | 80 |
| Saudi Arabia | 77 |
| South Africa | 76 |
| Turkey | 75 |
| Peru | 75 |
| China | 75 |
| Colombia | 75 |
| Australia | 74 |
| Great Britain | 74 |
| Canada | 74 |
| Chile | 72 |
| France | 69 |
| Argentina | 67 |
| Russia | 66 |
| Belgium | 66 |
| Germany | 63 |
| Poland | 63 |
| US | 62 |
| Sweden | 62 |
| Spain | 58 |
| Serbia | 57 |
| Italy | 54 |
| Mexico | 54 |
| Brazil | 53 |
| Japan | 51 |
| Hungary | 41 |

# 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)**
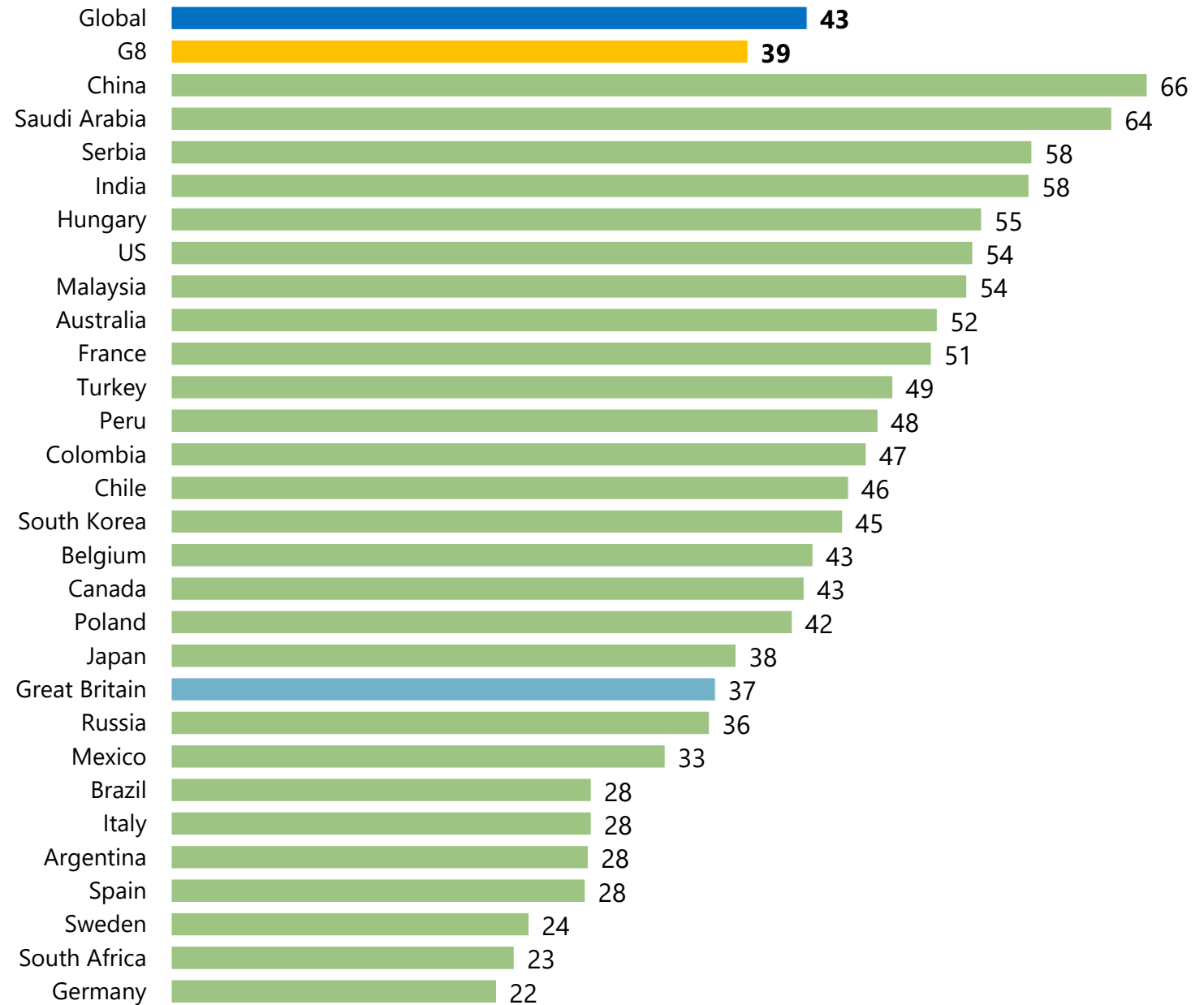
**% very/fairly good**

| Country | Value |
|---|---|
| Global | 45 |
| G8 | 46 |
| China | 79 |
| South Korea | 73 |
| Saudi Arabia | 67 |
| Malaysia | 66 |
| Russia | 64 |
| India | 62 |
| Australia | 55 |
| Japan | 53 |
| Turkey | 51 |
| Argentina | 48 |
| US | 48 |
| France | 47 |
| Canada | 47 |
| Spain | 45 |
| Poland | 44 |
| Chile | 44 |
| Peru | 41 |
| Great Britain | 38 |
| Germany | 38 |
| Sweden | 38 |
| Belgium | 37 |
| Mexico | 35 |
| Italy | 29 |
| Brazil | 28 |
| South Africa | 27 |
| Hungary | 26 |
| Colombia | 24 |
| Serbia | 13 |

Source: Ipsos/ GIIA

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# 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]...**
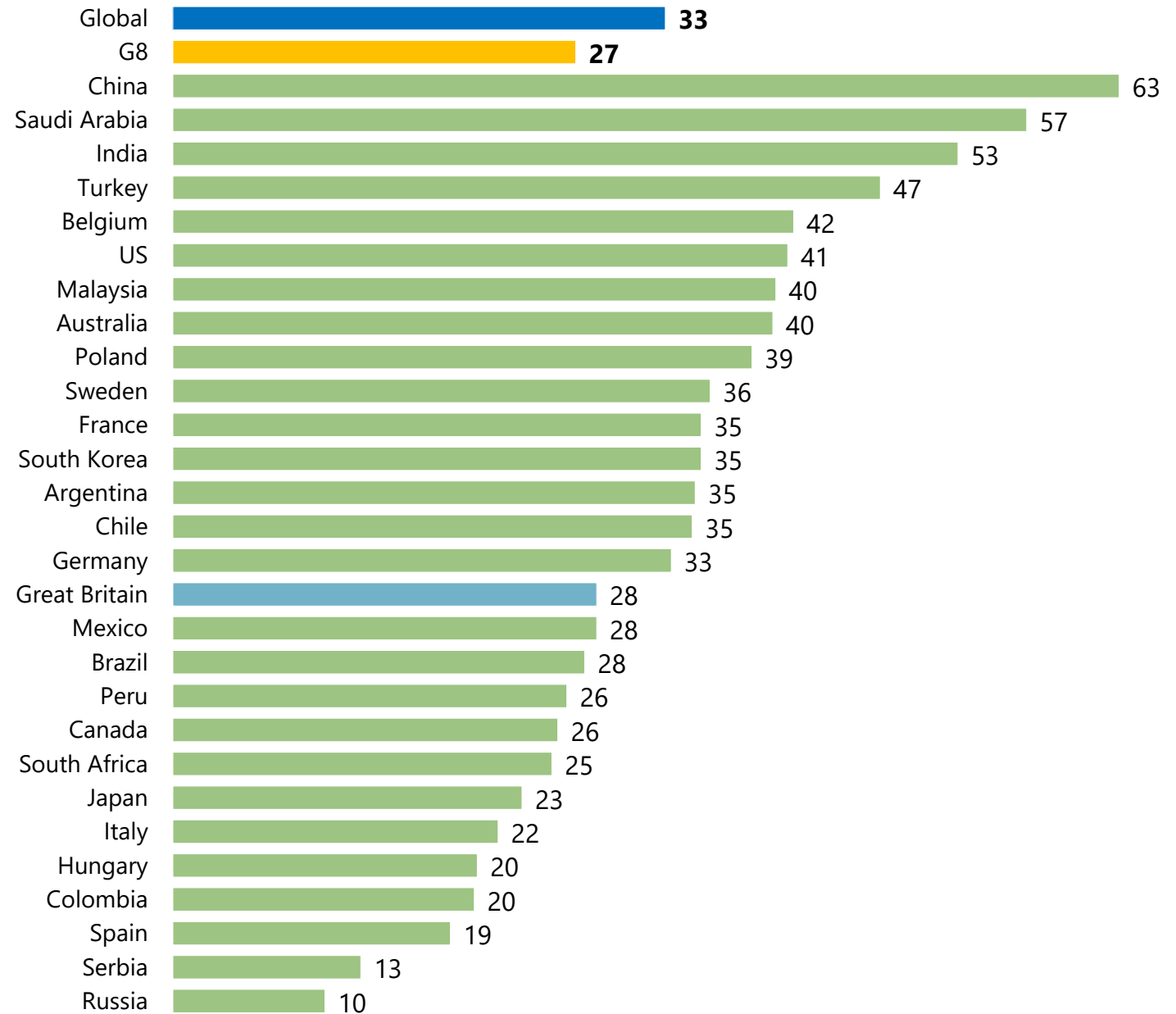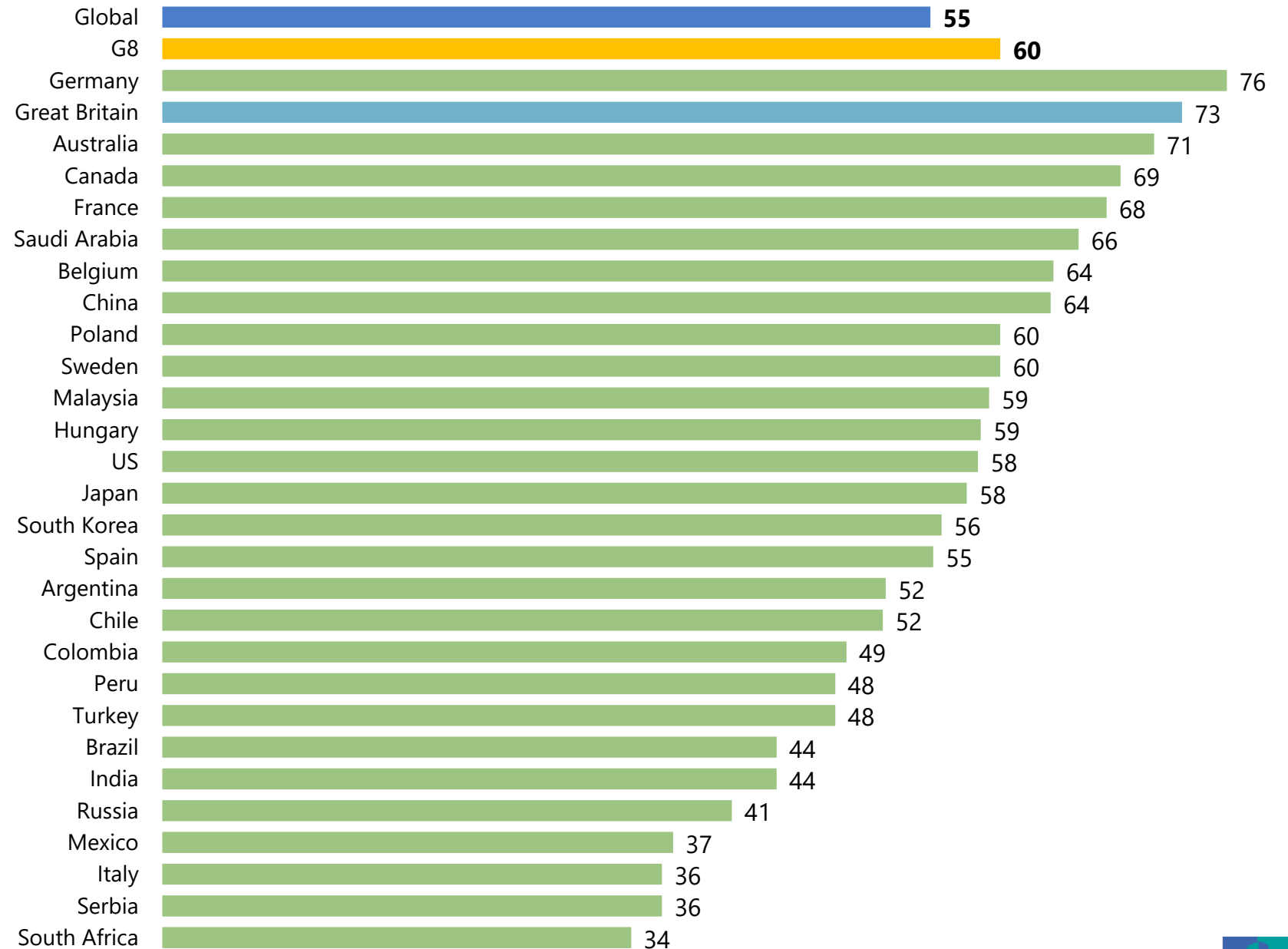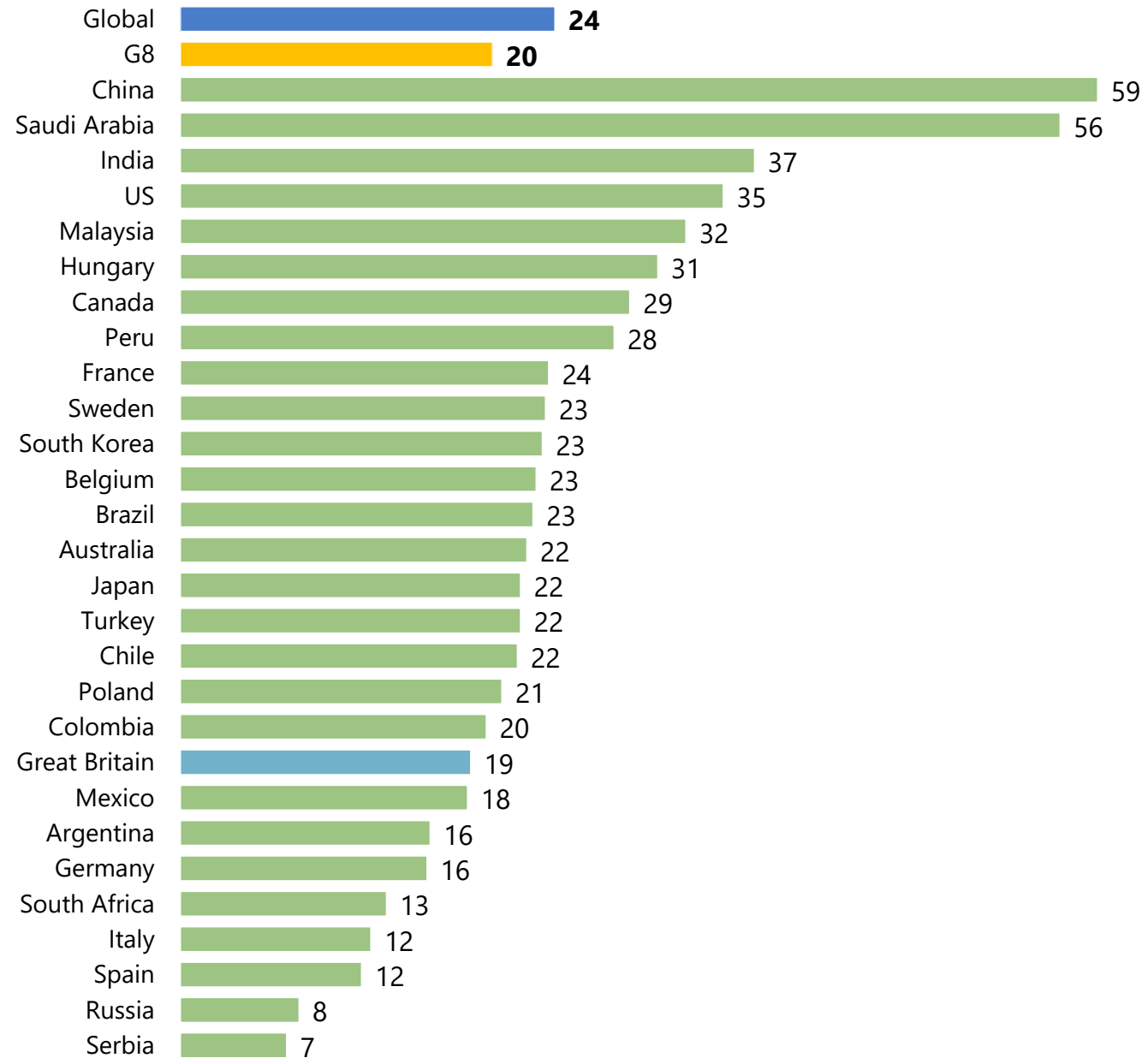
**New housing supply**

**% very/fairly good**

| Country | Value |
|---|---|
| Global | 43 |
| G8 | 39 |
| China | 66 |
| Saudi Arabia | 64 |
| Serbia | 58 |
| India | 58 |
| Hungary | 55 |
| US | 54 |
| Malaysia | 54 |
| Australia | 52 |
| France | 51 |
| Turkey | 49 |
| Peru | 48 |
| Colombia | 47 |
| Chile | 46 |
| South Korea | 45 |
| Belgium | 43 |
| Canada | 43 |
| Poland | 42 |
| Japan | 38 |
| Great Britain | 37 |
| Russia | 36 |
| Mexico | 33 |
| Brazil | 28 |
| Italy | 28 |
| Argentina | 28 |
| Spain | 28 |
| Sweden | 24 |
| South Africa | 23 |
| Germany | 22 |

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019
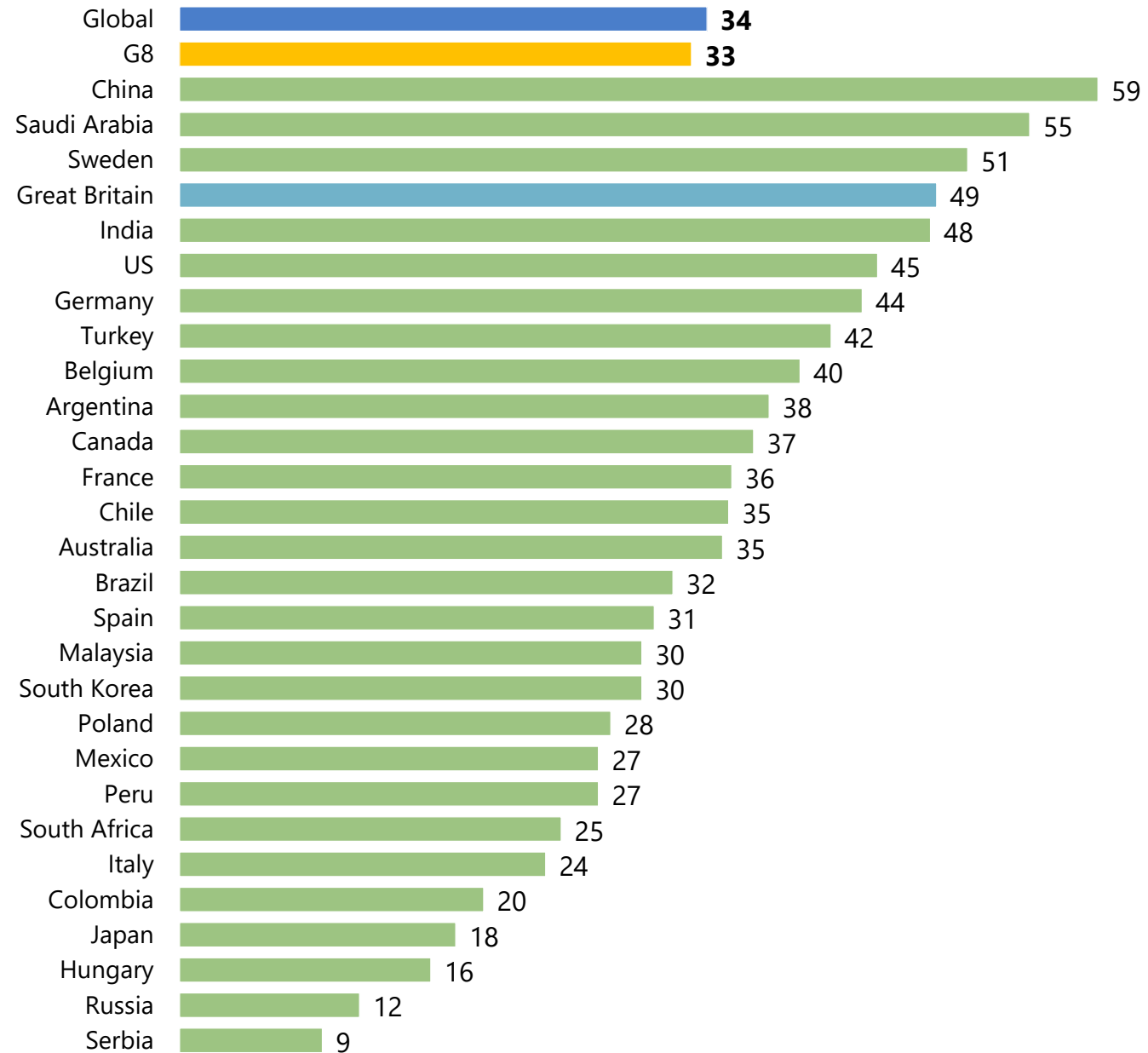
Ipsos

# Solar 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]...**

**Solar energy infrastructure**

**% very/fairly good**

| Country | Value |
|---|---|
| Global | 33 |
| G8 | 27 |
| China | 63 |
| Saudi Arabia | 57 |
| India | 53 |
| Turkey | 47 |
| Belgium | 42 |
| US | 41 |
| Malaysia | 40 |
| Australia | 40 |
| Poland | 39 |
| Sweden | 36 |
| France | 35 |
| South Korea | 35 |
| Argentina | 35 |
| Chile | 35 |
| Germany | 33 |
| Great Britain | 28 |
| Mexico | 28 |
| Brazil | 28 |
| Peru | 26 |
| Canada | 26 |
| South Africa | 25 |
| Japan | 23 |
| Italy | 22 |
| Hungary | 20 |
| Colombia | 20 |
| Spain | 19 |
| Serbia | 13 |
| Russia | 10 |

# 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]…**
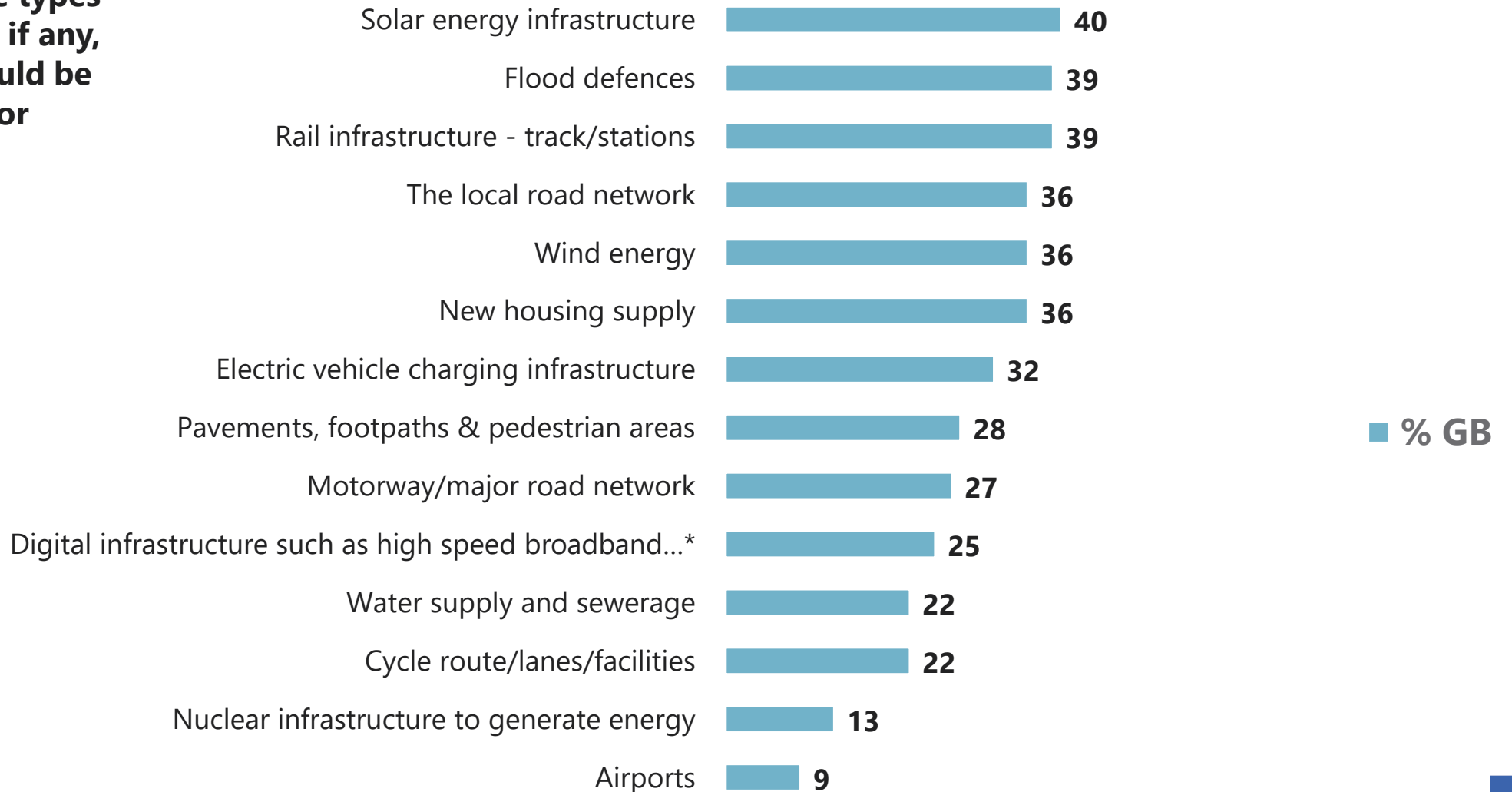
**Water supply and sewerage**

**% very/fairly good**

| Country | Value |
|---|---|
| Global | 55 |
| G8 | 60 |
| Germany | 76 |
| Great Britain | 73 |
| Australia | 71 |
| Canada | 69 |
| France | 68 |
| Saudi Arabia | 66 |
| Belgium | 64 |
| China | 64 |
| Poland | 60 |
| Sweden | 60 |
| Malaysia | 59 |
| Hungary | 59 |
| US | 58 |
| Japan | 58 |
| South Korea | 56 |
| Spain | 55 |
| Argentina | 52 |
| Chile | 52 |
| Colombia | 49 |
| Peru | 48 |
| Turkey | 48 |
| Brazil | 44 |
| India | 44 |
| Russia | 41 |
| Mexico | 37 |
| Italy | 36 |
| Serbia | 36 |
| South Africa | 34 |

Source: Ipsos/ GIIA

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

Ipsos

# Electric vehicle charging

**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]…**

**Electric vehicle charging infrastructure**

**% very/fairly good**

| Country | Value |
|---|---|
| Global | 24 |
| G8 | 20 |
| China | 59 |
| Saudi Arabia | 56 |
| India | 37 |
| US | 35 |
| Malaysia | 32 |
| Hungary | 31 |
| Canada | 29 |
| Peru | 28 |
| France | 24 |
| Sweden | 23 |
| South Korea | 23 |
| Belgium | 23 |
| Brazil | 23 |
| Australia | 22 |
| Japan | 22 |
| Turkey | 22 |
| Chile | 22 |
| Poland | 21 |
| Colombia | 20 |
| Great Britain | 19 |
| Mexico | 18 |
| Argentina | 16 |
| Germany | 16 |
| South Africa | 13 |
| Italy | 12 |
| Spain | 12 |
| Russia | 8 |
| Serbia | 7 |

# Wind 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]...**

**Wind energy e.g. turbines**

**% very/fairly good**

| Country | Value |
|---------|-------|
| Global | 34 |
| G8 | 33 |
| China | 59 |
| Saudi Arabia | 55 |
| Sweden | 51 |
| Great Britain | 49 |
| India | 48 |
| US | 45 |
| Germany | 44 |
| Turkey | 42 |
| Belgium | 40 |
| Argentina | 38 |
| Canada | 37 |
| France | 36 |
| Chile | 35 |
| Australia | 35 |
| Brazil | 32 |
| Spain | 31 |
| Malaysia | 30 |
| South Korea | 30 |
| Poland | 28 |
| Mexico | 27 |
| Peru | 27 |
| South Africa | 25 |
| Italy | 24 |
| Colombia | 20 |
| Japan | 18 |
| Hungary | 16 |
| Russia | 12 |
| Serbia | 9 |

# GB: Priorities

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

| | % GB |
|---|---|
| Solar energy infrastructure | 40 |
| Flood defences | 39 |
| Rail infrastructure - track/stations | 39 |
| The local road network | 36 |
| Wind energy | 36 |
| New housing supply | 36 |
| Electric vehicle charging infrastructure | 32 |
| Pavements, footpaths & pedestrian areas | 28 |
| Motorway/major road network | 27 |
| Digital infrastructure such as high speed broadband...* | 25 |
| Water supply and sewerage | 22 |
| Cycle route/lanes/facilities | 22 |
| Nuclear infrastructure to generate energy | 13 |
| Airports | 9 |

■ % GB

# 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]?**

| Infrastructure | % GB | % G8 |
|---|---|---|
| Solar energy infrastructure | 40 | 32 |
| Flood defences | 39 | 35 |
| Rail infrastructure - track/stations | 39 | 28 |
| The local road network | 36 | 38 |
| Wind energy | 36 | 28 |
| New housing supply | 36 | 28 |
| Electric vehicle charging infrastructure | 32 | 21 |
| Pavements, footpaths & pedestrian areas | 28 | 29 |
| Motorway/major road network | 27 | 28 |
| Digital infrastructure such as high speed broadband...* | 25 | 25 |
| Water supply and sewerage | 22 | 28 |
| Cycle route/lanes/facilities | 22 | 23 |
| Nuclear infrastructure to generate energy | 13 | 11 |
| Airports | 9 | 9 |

■ **% GB**
■ % G8

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# 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…**

**% ranking factor as most important (1st out of 7)**



21 Highest % shown

— GB  — G8

Disruption: 8
Legacy: 10
Resilience: 17
Environment: 28
Investment: 13
Quality: 21
Ownership: 9

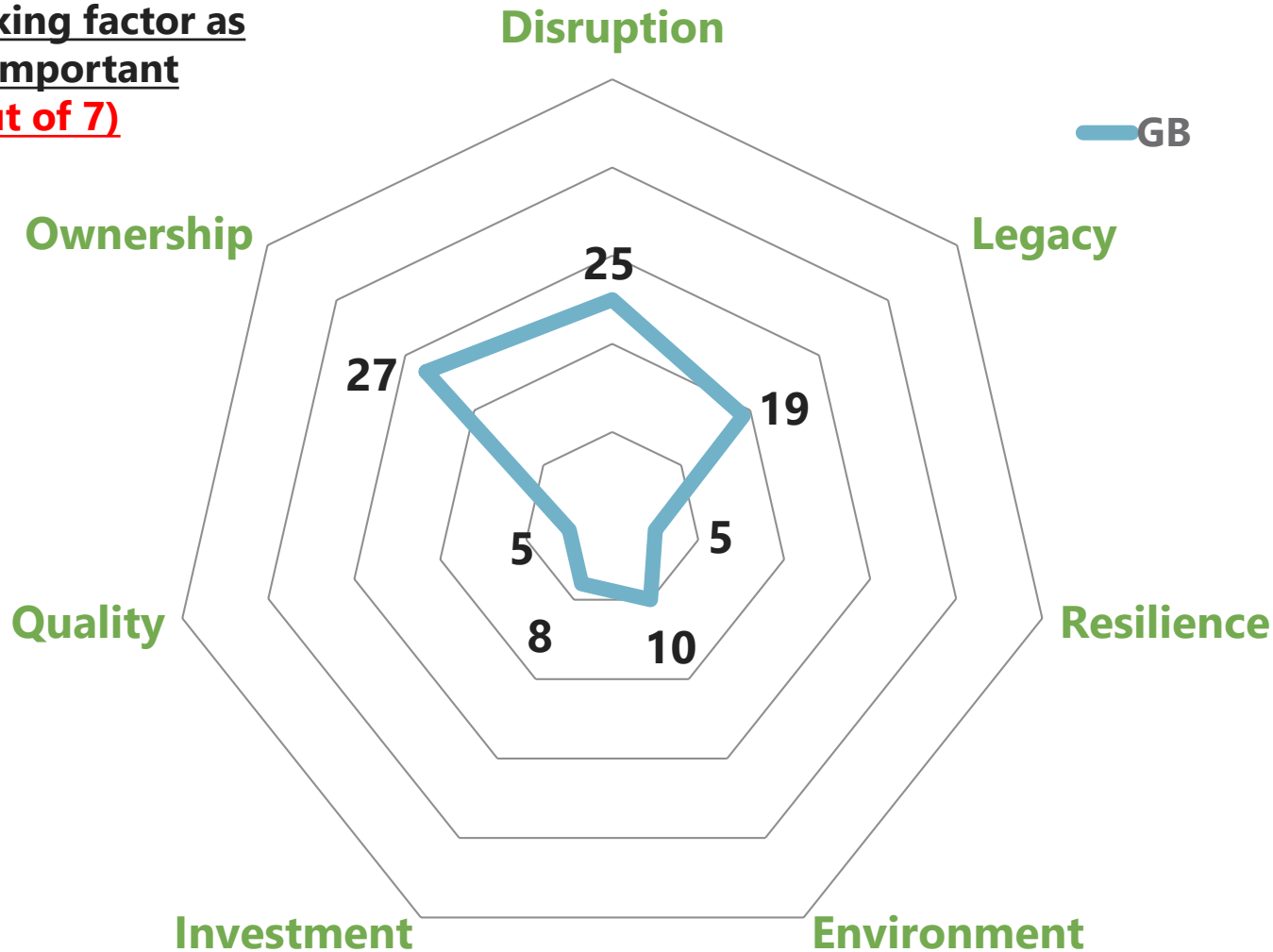| Factor |
| --- |
| **Disruption:** the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved |
| **Legacy:** the infrastructure that we pass on to future generations |
| **Resilience:** how well our infrastructure stands up to challenges today and in the future (e.g. population increases and climate change) |
| **Environment:** the impact our infrastructure has on our environment |
| **Investment:** paying for the costs of improving and building new infrastructure now, to avoid having to pay more later |
| **Quality:** making sure that infrastructure is as good as it possibly can be (e.g. in terms of speed or convenience of services) |
| **Ownership**:  whether the infrastructure is owned by the public sector – that is, national or local government or some other public sector body – or private businesses |

Source: Ipsos/ GIIA

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# 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…**

**% ranking factor as most important (1st out of 7)**



GB

Disruption 8
Legacy 8
Resilience 17
Environment 28
Investment 10
Quality 21
Ownership 8

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

| Factor |
| --- |
| **Disruption:** the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved |
| **Legacy:** the infrastructure that we pass on to future generations |
| **Resilience:** how well our infrastructure stands up to challenges today and in the future (e.g. population increases and climate change) |
| **Environment:** the impact our infrastructure has on our environment |
| **Investment:** paying for the costs of improving and building new infrastructure now, to avoid having to pay more later |
| **Quality:** making sure that infrastructure is as good as it possibly can be (e.g. in terms of speed or convenience of services) |
| **Ownership**: whether the infrastructure is owned by the public sector – that is, national or local government or some other public sector body – or private businesses |

# 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...**

**% ranking factor as most important (7th out of 7)**



**GB**  **G8**

Disruption 25

Ownership 27

19 Legacy

21 Highest % shown

8  8

10  11

Quality

Resilience

Investment

Environment

Source: Ipsos/ GIIA

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

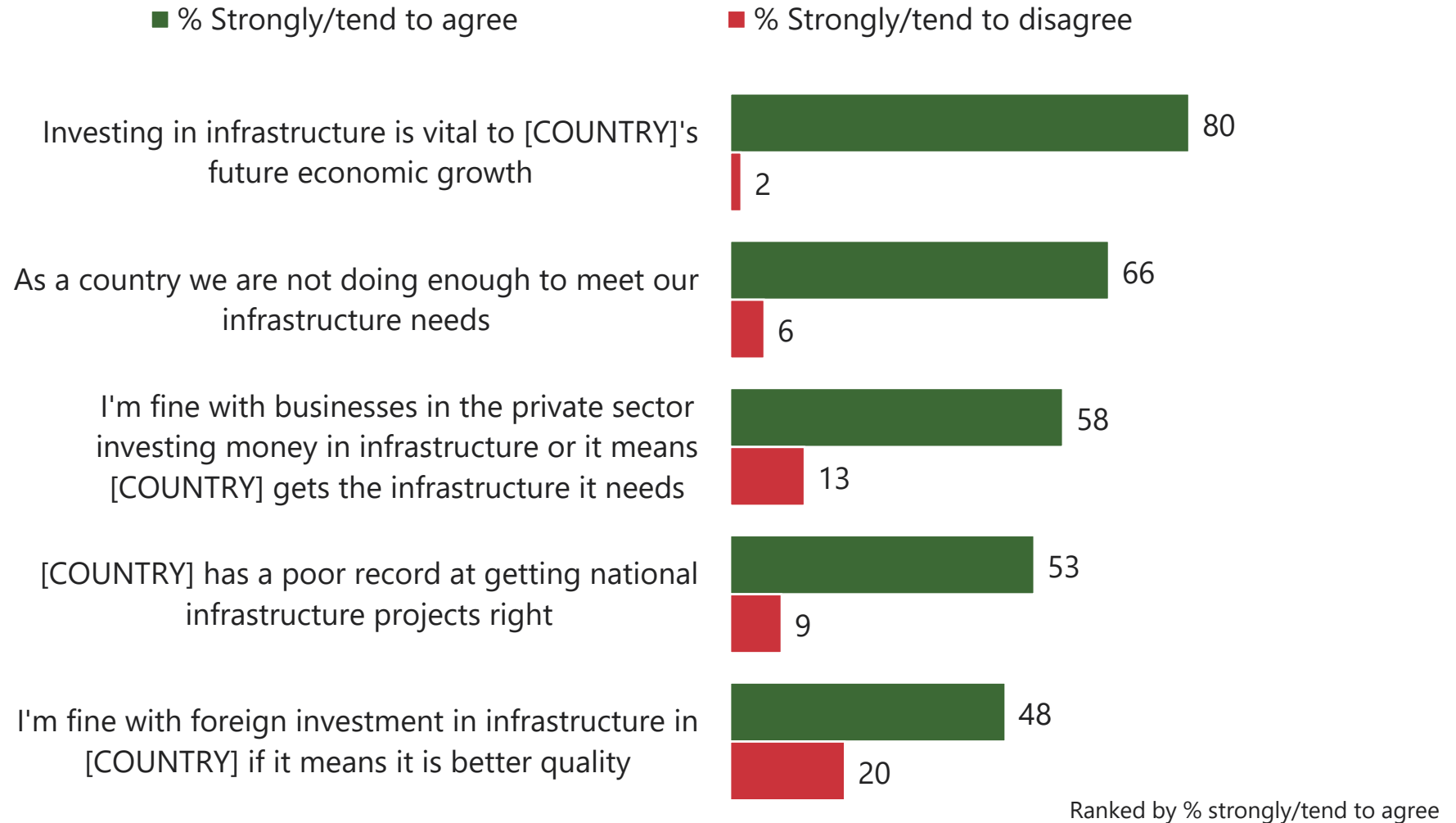| Factor |
| --- |
| **Disruption:** the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved |
| **Legacy:** the infrastructure that we pass on to future generations |
| **Resilience:** how well our infrastructure stands up to challenges today and in the future (e.g. population increases and climate change) |
| **Environment:** the impact our infrastructure has on our environment |
| **Investment:** paying for the costs of improving and building new infrastructure now, to avoid having to pay more later |
| **Quality:** making sure that infrastructure is as good as it possibly can be (e.g. in terms of speed or convenience of services) |
| **Ownership**:  whether the infrastructure is owned by the public sector – that is, national or local government or some other public sector body – or private businesses |

# 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…**

**% ranking factor as most important (7th out of 7)**



GB

Disruption 25
Ownership 27
Legacy 19
Quality 5
Resilience 5
Investment 8
Environment 10

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

| Factor |
| --- |
| **Disruption:** the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved |
| **Legacy:** the infrastructure that we pass on to future generations |
| **Resilience:** how well our infrastructure stands up to challenges today and in the future (e.g. population increases and climate change) |
| **Environment:** the impact our infrastructure has on our environment |
| **Investment:** paying for the costs of improving and building new infrastructure now, to avoid having to pay more later |
| **Quality:** making sure that infrastructure is as good as it possibly can be (e.g. in terms of speed or convenience of services) |
| **Ownership**:  whether the infrastructure is owned by the public sector – that is, national or local government or some other public sector body – or private businesses |

# GB: Attitudes

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

■ % Strongly/tend to agree    ■ % Strongly/tend to disagree

Investing in infrastructure is vital to [COUNTRY]'s future economic growth
- 80
- 2

As a country we are not doing enough to meet our infrastructure needs
- 66
- 6

I'm fine with businesses in the private sector investing money in infrastructure or it means [COUNTRY] gets the infrastructure it needs
- 58
- 13

[COUNTRY] has a poor record at getting national infrastructure projects right
- 53
- 9

I'm fine with foreign investment in infrastructure in [COUNTRY] if it means it is better quality
- 48
- 20

Ranked by % strongly/tend to agree

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

Ipsos

# 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



25
42
20
6
1
7
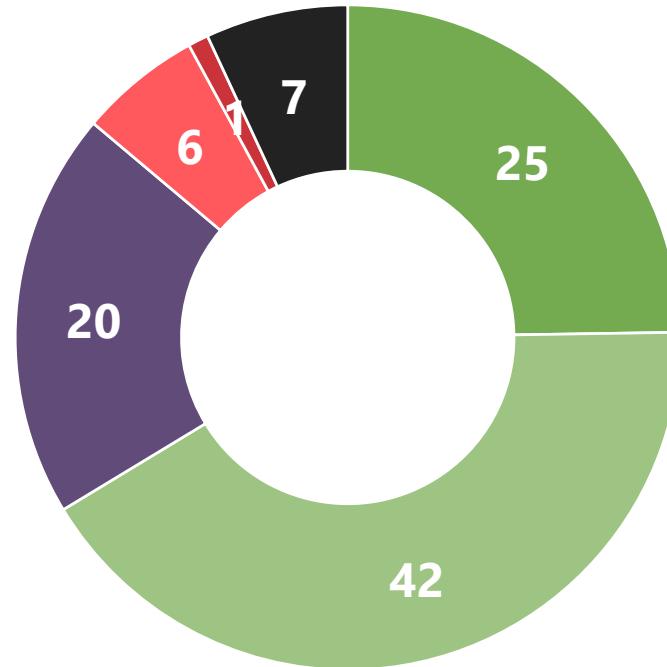
**2019:**

| Agree | Disagree |
|-------|----------|
| 66% | 6% |

**2018:**

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

**2017:**

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

**2016:**

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

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# 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
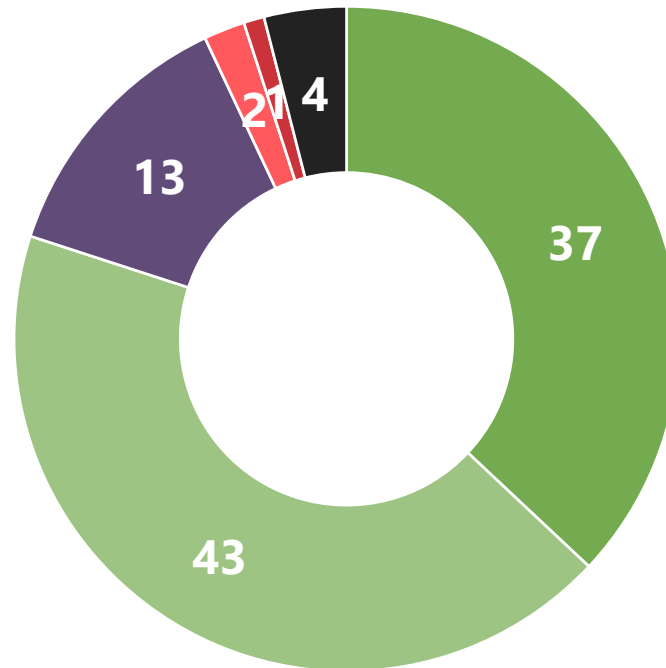


**2019:**

| Agree | Disagree |
|-------|----------|
| 80% | 2% |

**2018:**

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

**2017**

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

**2016:**

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

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# GB: Poor record

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

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

- 🟩 % Strongly agree
- 🟩 % Tend to agree
- 🟪 % Neither/nor
- 🟥 % Tend to disagree
- 🟥 % Strongly disagree
- ⬛ % Don't know
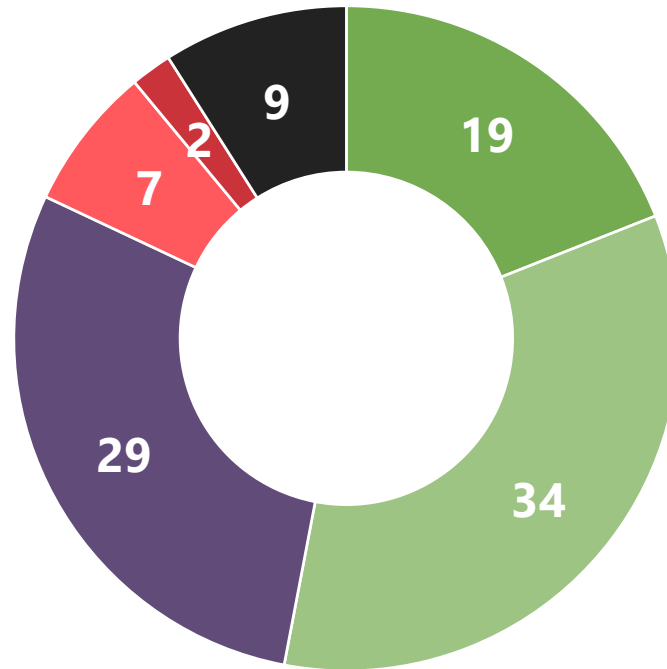


| 2019: | |
|---|---|
| **Agree** | **Disagree** |
| **53%** | **9%** |

| 2016: | |
|---|---|
| **Agree** | **Disagree** |
| **48%** | **12%** |

Source: Ipsos/ GIIA

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

22

# 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 is better quality**

■ % Strongly agree   ■ % Tend to agree   ■ % Neither/nor

■ % Tend to disagree   ■ % Strongly disagree   ■ % Don't know
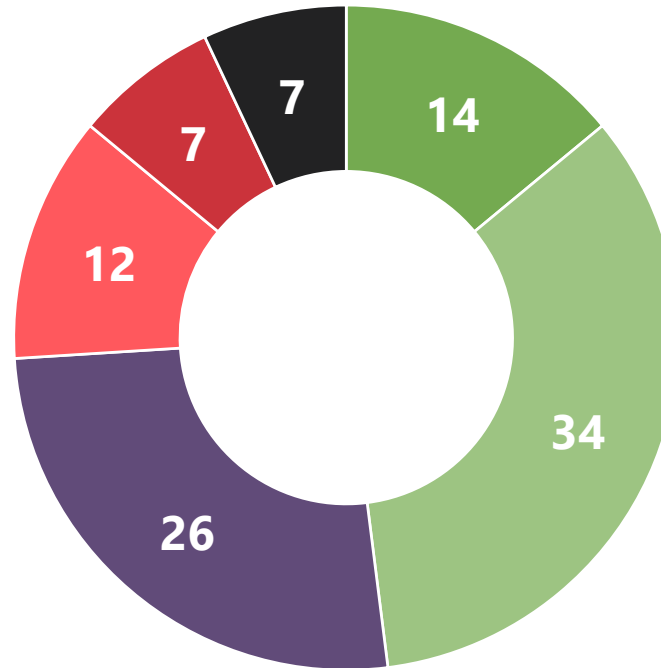
N.B. asked as "… it if it means it gets built more quickly" in 2016 and 2018 i.e. trends are not like-for-like.



**2019:**

| Agree | Disagree |
|-------|----------|
| 48% | 20% |

**2018:**

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

**2016:**

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

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# Who takes decisions?

**A: "Politicians should mostly make decisions about new infrastructure projects because they are accountable to the public."**

% STRONGLY/TEND TO PREFER EACH STATEMENT

**B: "Technical experts should mostly make decisions about new infrastructure projects because they know more about what** [COUNTRY] **needs."**

■ GB    ■ G8

**13**    **18**

**62**    **53**

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

Ipsos
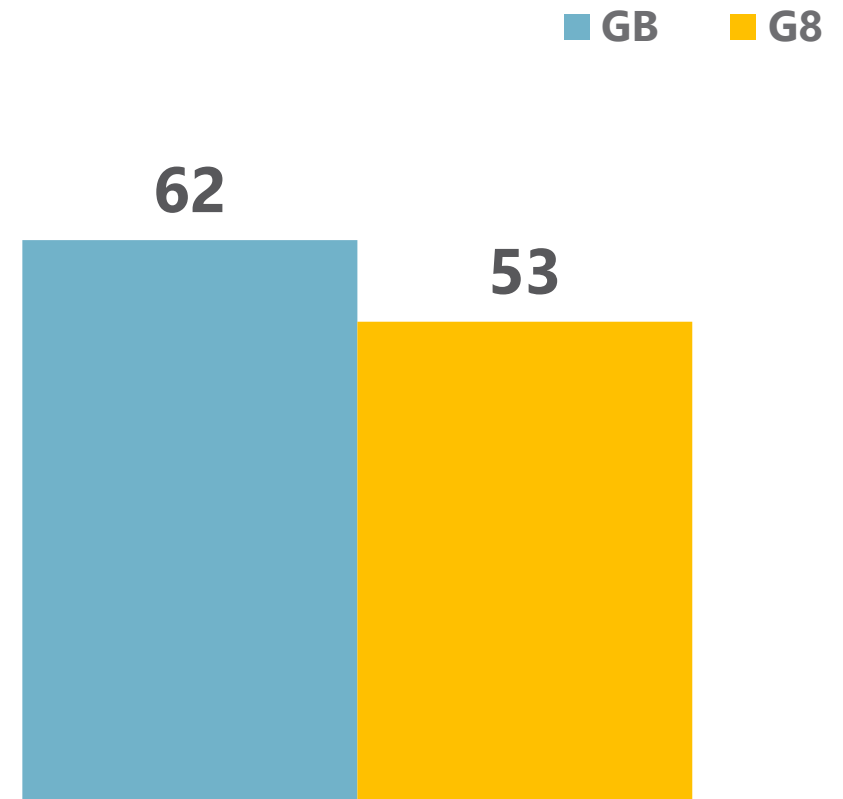
# Increase taxes or borrowing?

**A: "Spending on improving infrastructure in [COUNTRY] should be increased, even if that means higher taxes or more government borrowing"**

% STRONGLY/TEND TO PREFER EACH STATEMENT
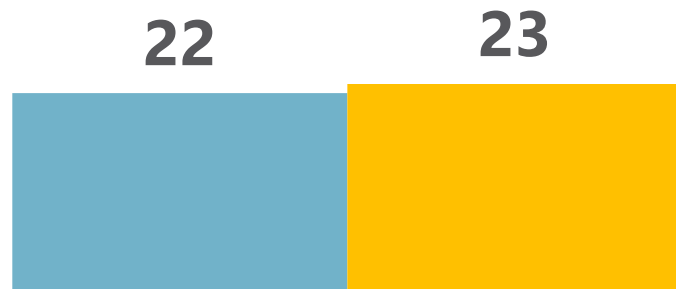
**B: "Public spending in [COUNTRY] is already high and taxes and government borrowing should not be increased any more to spend more on improving infrastructure"**

■ GB   ■ G8

**22**  **23**

**53**  **47**

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

Ipsos
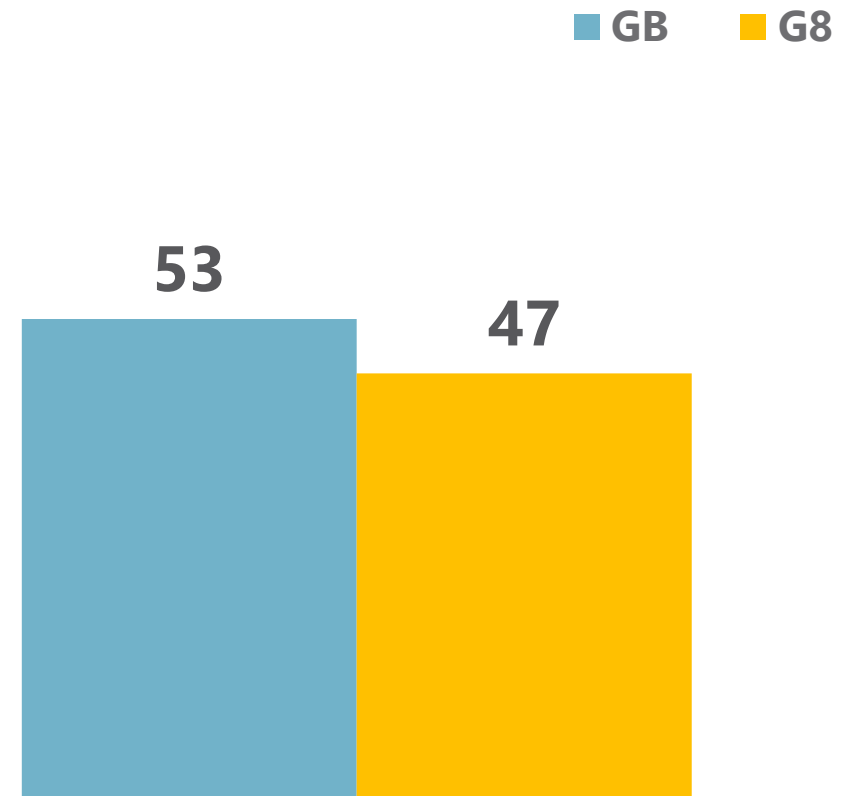
# Maintain/repair or new?

**A: "We should prioritise maintaining and repairing existing infrastructure in** [COUNTRY] **before spending on new infrastructure"**

% STRONGLY/TEND TO PREFER EACH STATEMENT
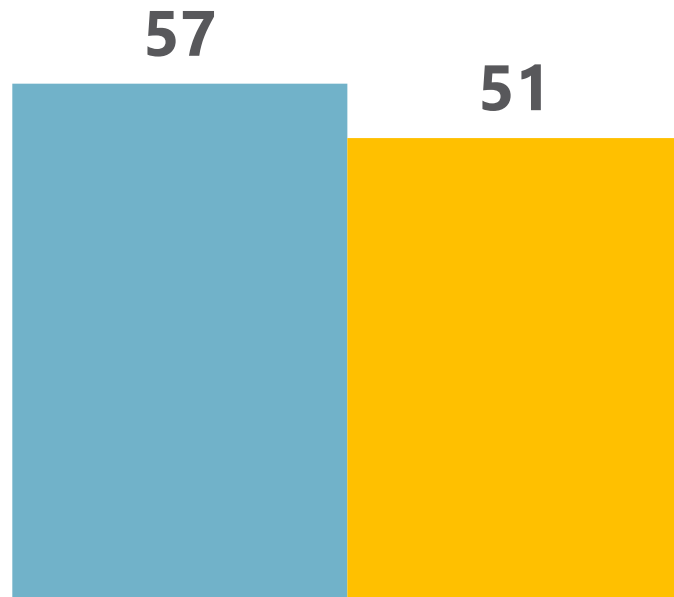
**B: "We need to spend money on new infrastructure in** [COUNTRY] **even if it means having less to spend less on maintaining and repairing existing infrastructure"**
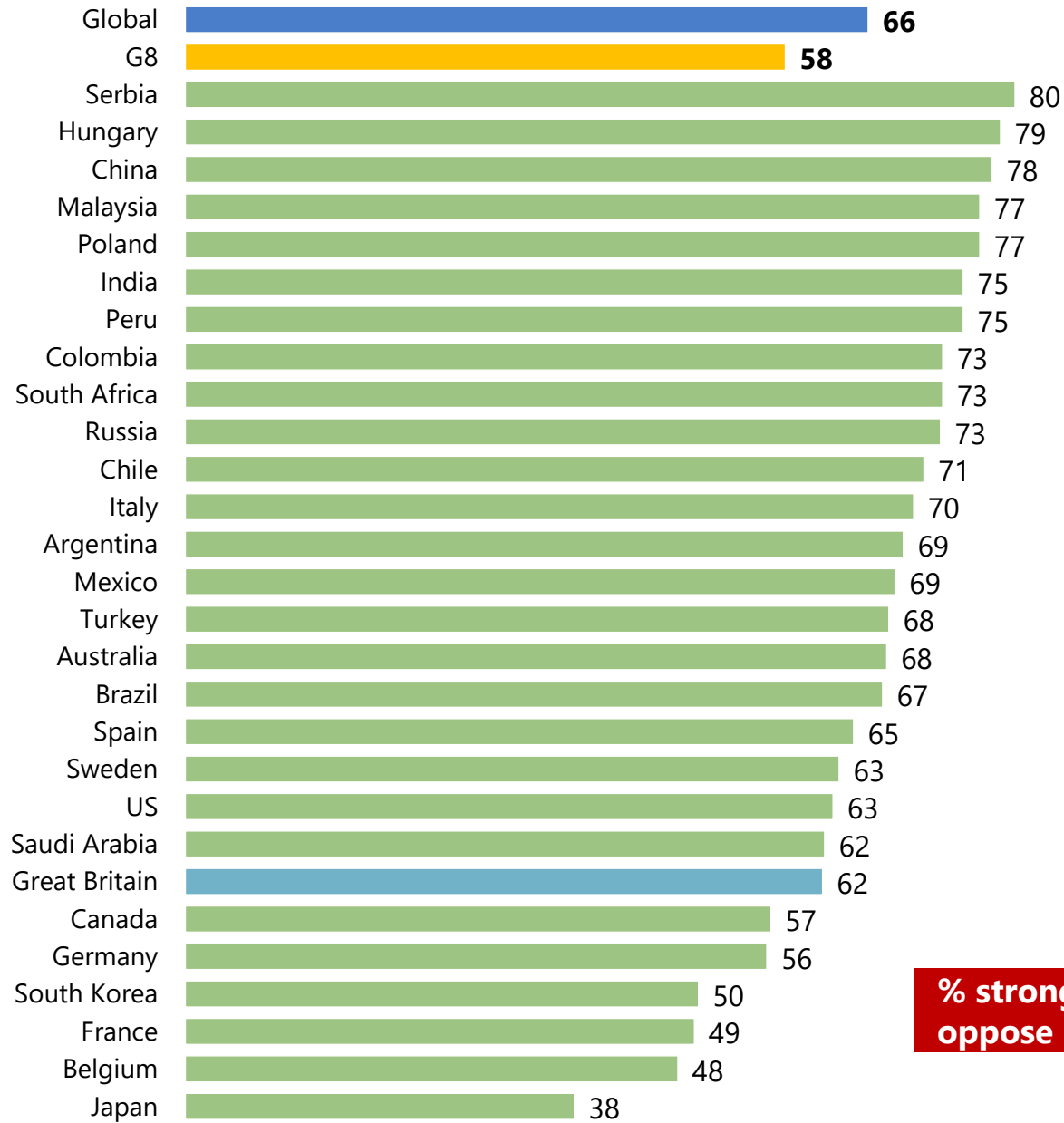
■ **GB**　■ **G8**

**57**　**51**

**14**　**17**

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019
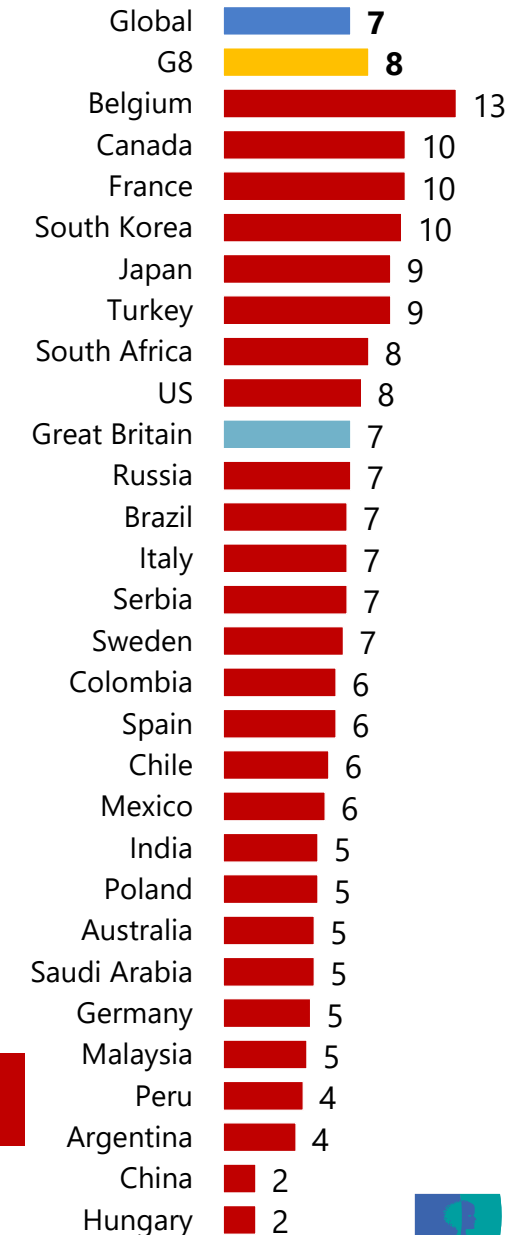
Ipsos
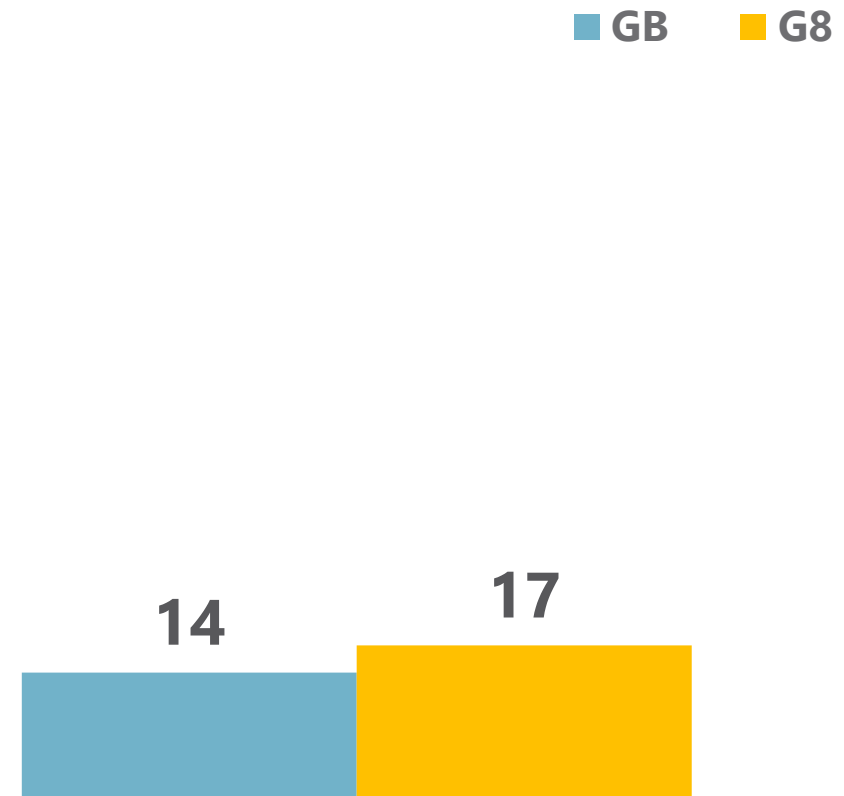
# 'Nimbyism'

Q. To what extent do you support or oppose, in principle, the building of new infrastructure in your local area. Again by infrastructure, we mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications. By local area we mean the area within 15-20 minutes' walk from where you live.

**% strongly/tend to support**

| | % strongly/tend to support |
|---|---|
| Global | 66 |
| G8 | 58 |
| Serbia | 80 |
| Hungary | 79 |
| China | 78 |
| Malaysia | 77 |
| Poland | 77 |
| India | 75 |
| Peru | 75 |
| Colombia | 73 |
| South Africa | 73 |
| Russia | 73 |
| Chile | 71 |
| Italy | 70 |
| Argentina | 69 |
| Mexico | 69 |
| Turkey | 68 |
| Australia | 68 |
| Brazil | 67 |
| Spain | 65 |
| Sweden | 63 |
| US | 63 |
| Saudi Arabia | 62 |
| Great Britain | 62 |
| Canada | 57 |
| Germany | 56 |
| South Korea | 50 |
| France | 49 |
| Belgium | 48 |
| Japan | 38 |

**% strongly/tend to oppose**

| | % strongly/tend to oppose |
|---|---|
| Global | 7 |
| G8 | 8 |
| Belgium | 13 |
| Canada | 10 |
| France | 10 |
| South Korea | 10 |
| Japan | 9 |
| Turkey | 9 |
| South Africa | 8 |
| US | 8 |
| Great Britain | 7 |
| Russia | 7 |
| Brazil | 7 |
| Italy | 7 |
| Serbia | 7 |
| Sweden | 7 |
| Colombia | 6 |
| Spain | 6 |
| Chile | 6 |
| Mexico | 6 |
| India | 5 |
| Poland | 5 |
| Australia | 5 |
| Saudi Arabia | 5 |
| Germany | 5 |
| Malaysia | 5 |
| Peru | 4 |
| Argentina | 4 |
| China | 2 |
| Hungary | 2 |

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# Impacts

**Q. Still thinking about building new infrastructure in your local area, to what extent would you support or oppose it being built there if...?**
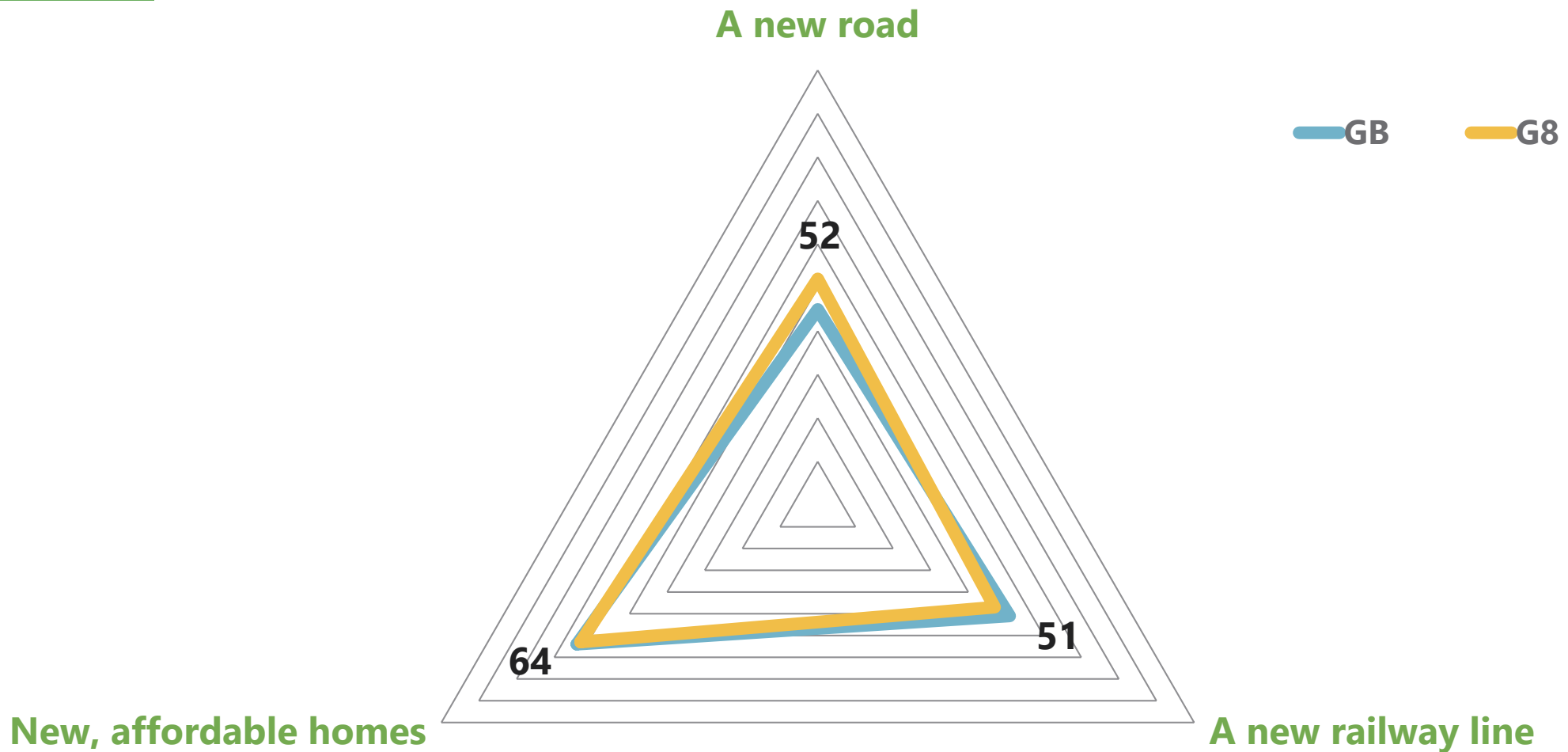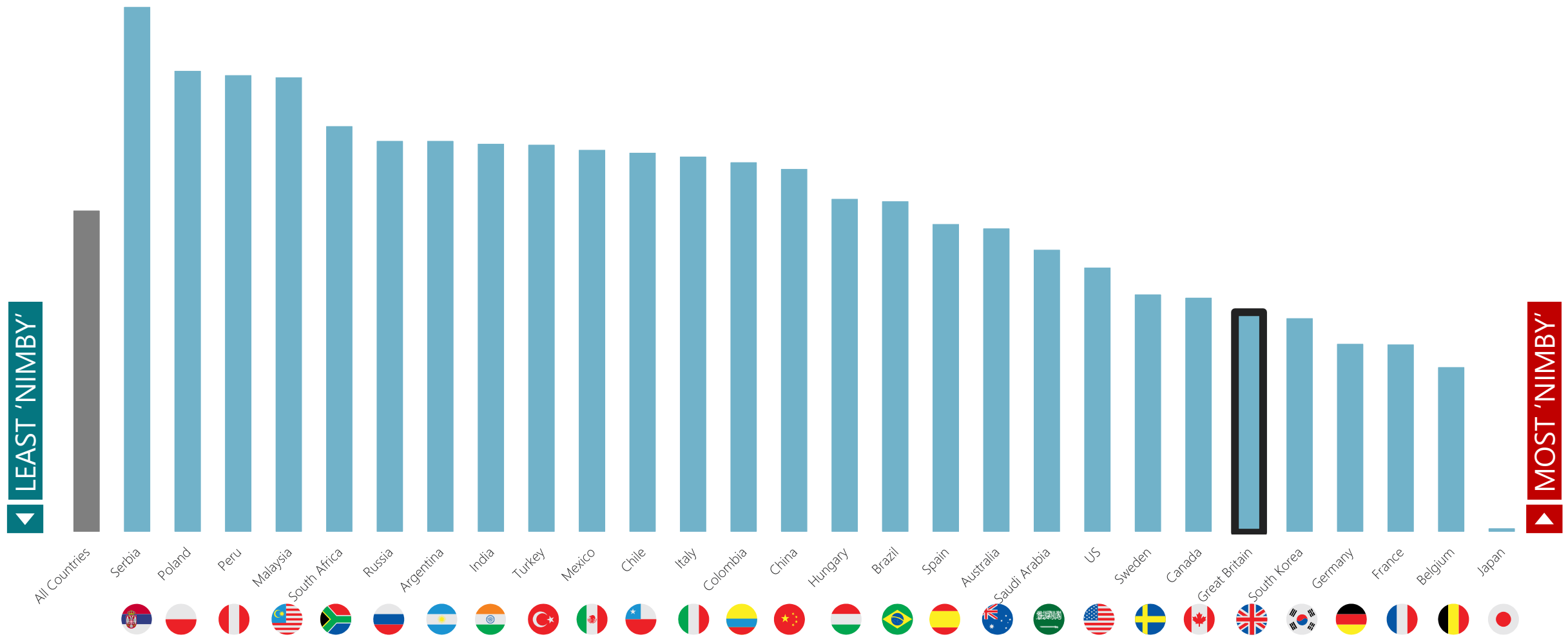
% strongly/tend to support

GB    G8

...it meant building on 'greenfield' i.e. land that had not previously been built on — **37**

...it helped to improve the local economy — **74**

**74** Highest % shown

...it meant an increase in traffic and congestion during building — **25**

...it created jobs by attracting people and businesses to the area — **70**

...it meant young people and families could stay — **67**

...it was environmentally-friendly overall — **77**

Source: Ipsos/ GIIA

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

28

# Impacts

**Q. Still thinking about building new infrastructure in your local area, to what extent would you support or oppose it being built there if...?**

**% strongly/tend to support**

...it meant building on 'greenfield' i.e. land that had not previously been built on

**GB**

...it meant an increase in traffic and congestion during building

...it helped to improve the local economy

**74**

**21**

**20**

...it meant young people and families could stay

**67**

...it created jobs by attracting people and businesses to the area

**70**

...it was environmentally-friendly overall

**77**

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# Types

**Q. To what extent do you support or oppose, in principle, the building of the following types of infrastructure in your local area?**

**% strongly/tend to support**



**A new road**

GB    G8

52

51

64

**New, affordable homes**

**A new railway line**

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# 'Nimby' index



LEAST 'NIMBY' ◄

MOST 'NIMBY' ▲

All Countries, Serbia, Poland, Peru, Malaysia, South Africa, Russia, Argentina, India, Turkey, Mexico, Chile, Italy, Colombia, China, Hungary, Brazil, Spain, Australia, Saudi Arabia, US, Sweden, Canada, Great Britain, South Korea, Germany, France, Belgium, Japan

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

# 'Nimby' – segmentation

High support under positive and negative conditions (impacts)
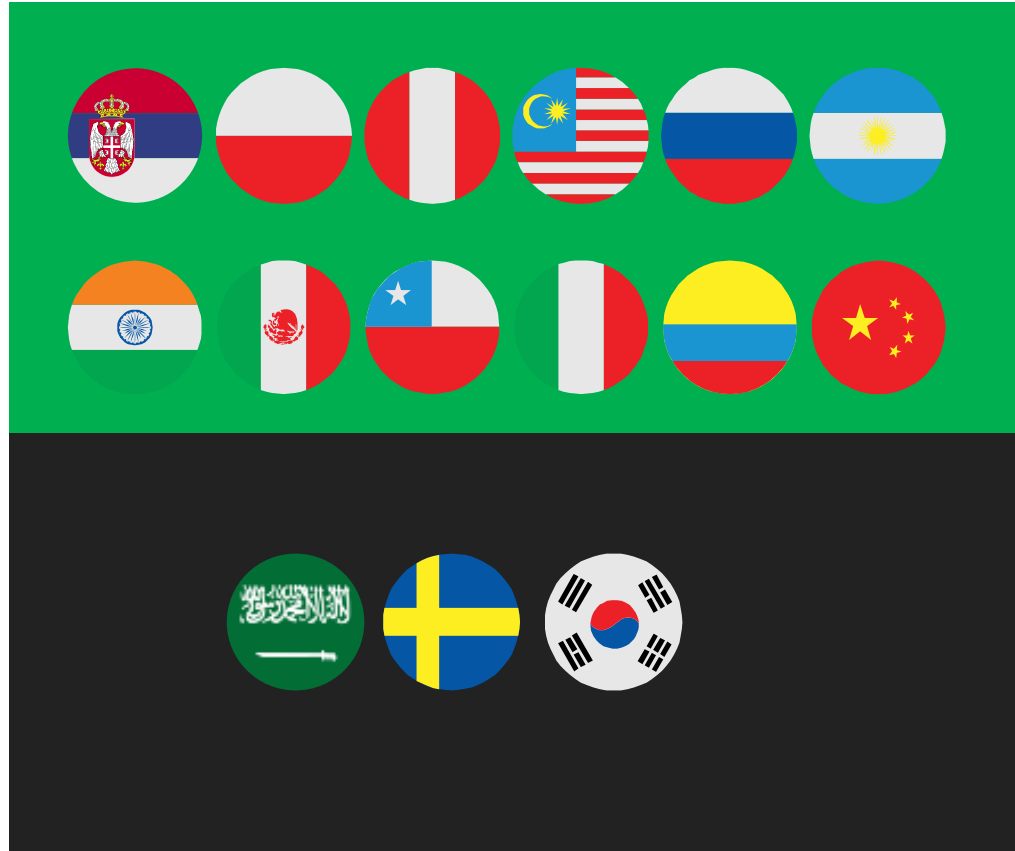
Support high/medium under positive conditions (impacts), low support under negative conditions



Medium support under positive conditions, low to medium support under negative conditions

Low support

Base: 1,002 GB adults among 19,516 adults (online), July-August 2019

- These are the findings of the fourth **Global Infrastructure Index** conducted via Ipsos' Global @dvisor between **26 July – 9 August 2019** in **28 countries** around the world via the Ipsos Online Panel system and involving **19,516** participants:
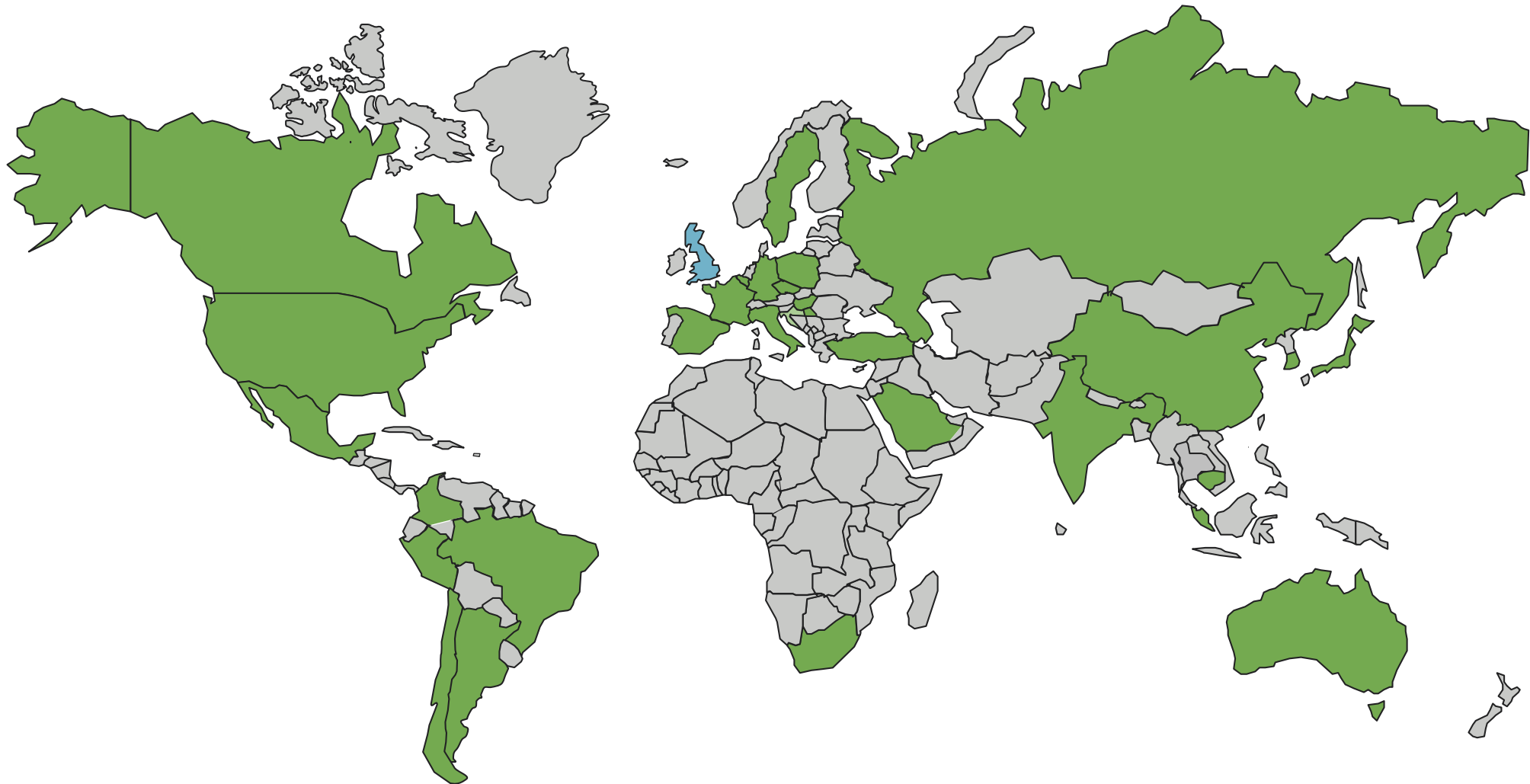
# Methodology

- 28 countries, **19,516** participants, **26 July**–**9 August 2019** (online):
  Argentina, Australia*, Belgium, Brazil, Canada*, Chile, China*, Colombia, France*, Germany*, **Great Britain (1,002)***,
  Hungary, India*, Italy*, Japan*, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Serbia,
  Spain*, Sweden, Turkey and the United States of America*                                    *denotes 1,000+ sample size*

- Participants were adults aged 18-64 in the US and Canada, 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 2016-2019 surveys used the same methodology, but the profile of participating countries changed. This means that the **global trend** does not always involve a like-for-like comparison. In 2018, Romania and Czech Republic were included, China wasn't. This year, Romania and Czech Republic were not included, but some questions were fielded in China.

- A selection of trends is included. Further information is available:

  https://www.ipsos.com/en/global-infrastructure-index-public-satisfaction-and-priorities-2018 (2018)

  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)

Ipsos

# Regions

# & sample sizes
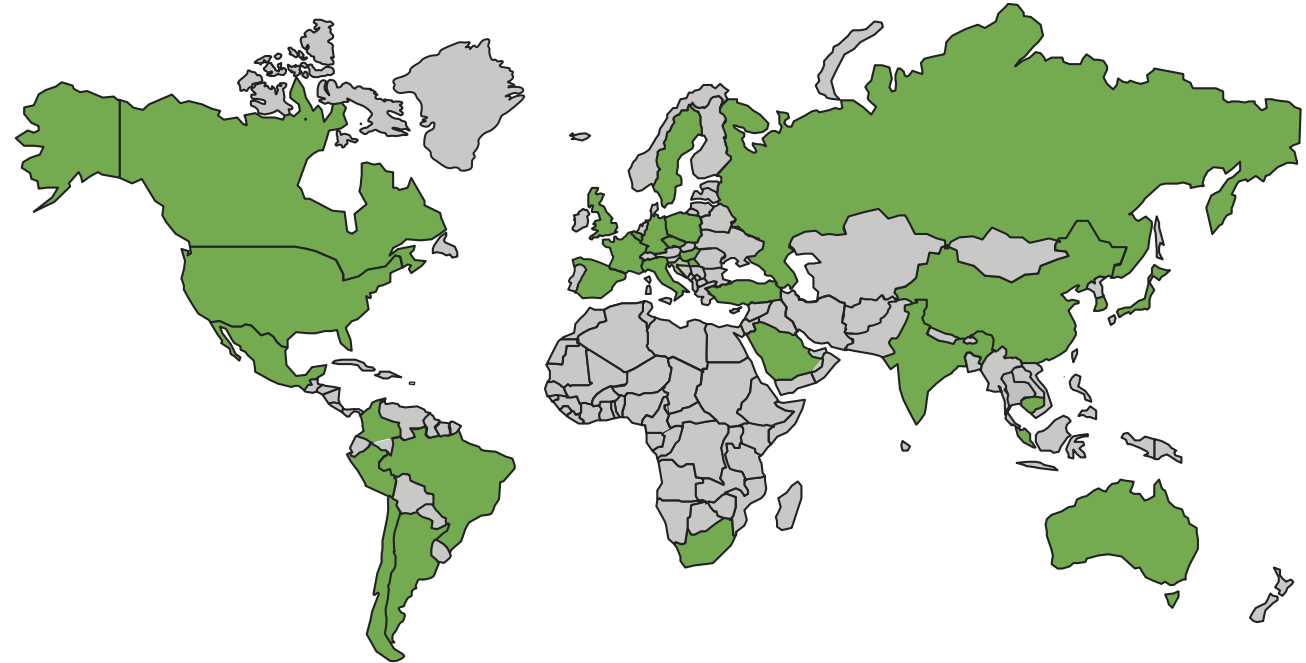


## Europe*

### 7,502

Belgium
France
Germany
**Great Britain**
Hungary
Italy
Poland
Serbia
Spain
Sweden

## N. America

### 2,002

Canada
U.S.A.

## LATAM

### 3,503

Argentina
Brazil
Chile
Colombia
Mexico
Peru

## APAC

### 4,508

Australia
India
Japan
Malaysia
South Korea

## G8

### 7,505

Canada
France
Germany
**Great Britain**
Italy
Japan
Russia
U.S.A.

## BRIC

### 3,008

Brazil
India
Russia
China

## ME Africa

### 1,501

Saudi Arabia
South Africa
Turkey

# The Nimby Index: technical details

- The 'Nimby' Index has been generated as part of the fourth **Global Infrastructure Index** conducted with the support of the Global Infrastructure Investor Association.

- The survey was conducted in 28 countries around the world, via the Ipsos Online Panel system. It involved **19,516** participants, between **26 July–9 August 2019**. The countries were:

  Argentina, Australia*, Belgium, Brazil, Canada*, Chile, China*, Colombia, France*, Germany*, Great Britain*, Hungary, India*, Italy*, Japan*, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Serbia, Spain*, Sweden, Turkey and the United States of America*

  *\* denotes 1,000+ sample size*

- Participants were adults aged 18-64 in the US and Canada, 18-65 and adults aged 16-64 in all other countries.

- The Index is based on the sum of support across Q7 which included six parts (and a mix of positive and negative 'conditions' or impacts)

  Q7. Still thinking about building new infrastructure in your local area, to what extent would you support or oppose it being built there if…?

  A) …it meant building on 'greenfield' i.e. land that had not previously been built on

  B) …it helped to improve the local economy

  C) ….it created jobs by attracting people and businesses to the area

  D) …it was environmentally-friendly overall

  E) …it meant young people and families could stay

  F) …it meant an increase in traffic and congestion during building

- These questions followed several relating to infrastructure (covering satisfaction and priorities). These presented definitions of infrastructure:

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

- The Index runs from 1 to 100 based on participants' positivity towards building new infrastructure, with the maximum value of 100 set at Serbia which scored the highest (and Japan, at 1, the lowest). The Index thus shows the relative 'nimbyism' between countries.

- The segmentation analysis was conducted using hierarchical clustering.

# Further information

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