



Ipsos MORI

Britain's infrastructure

Public satisfaction and priorities

October 2016

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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 Britain, the sample was 1,001 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-mori.com



Public lukewarm on Britain's infrastructure

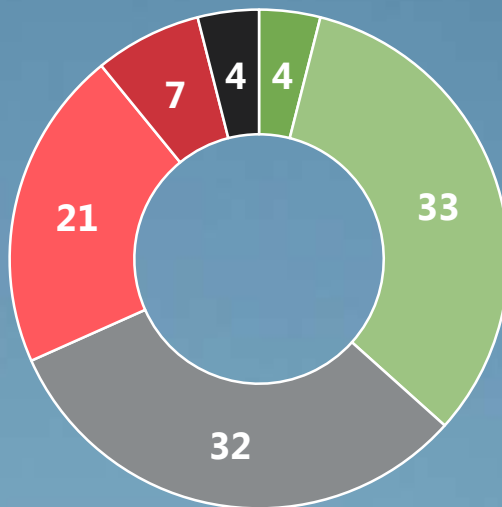
■ % Very satisfied ■ % Fairly satisfied ■ % Neither/nor
■ % Fairly dissatisfied ■ % Very dissatisfied ■ % Don't know

Q

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



Satisfied	Dissatisfied
36%	29%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

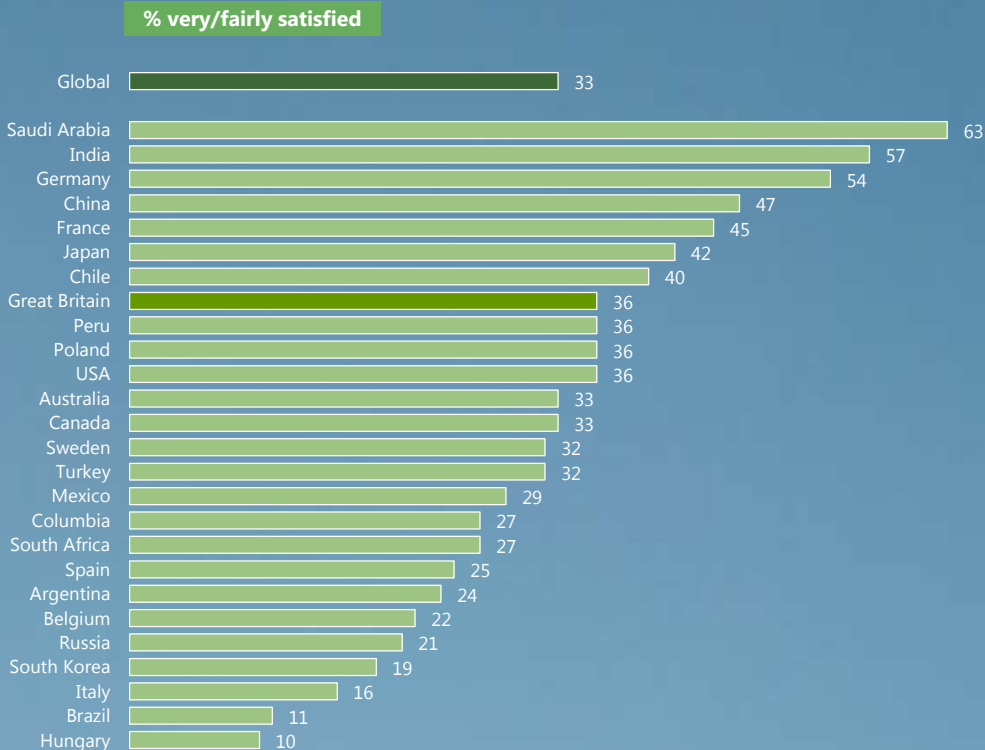
Just above global average

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.

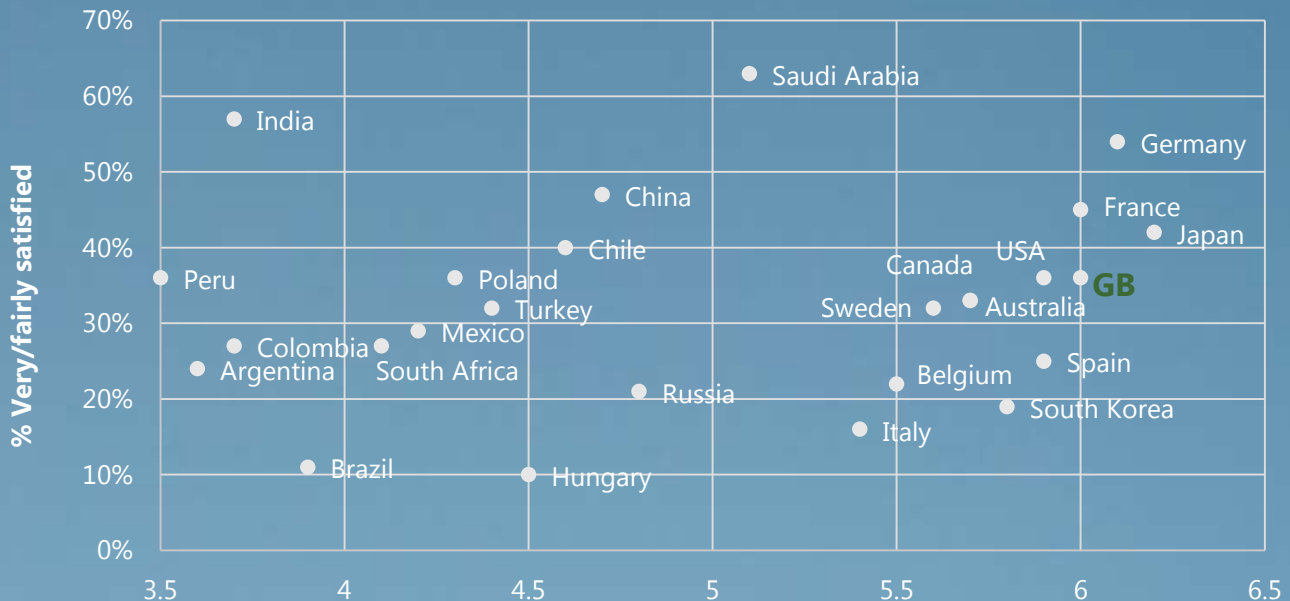
Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?



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

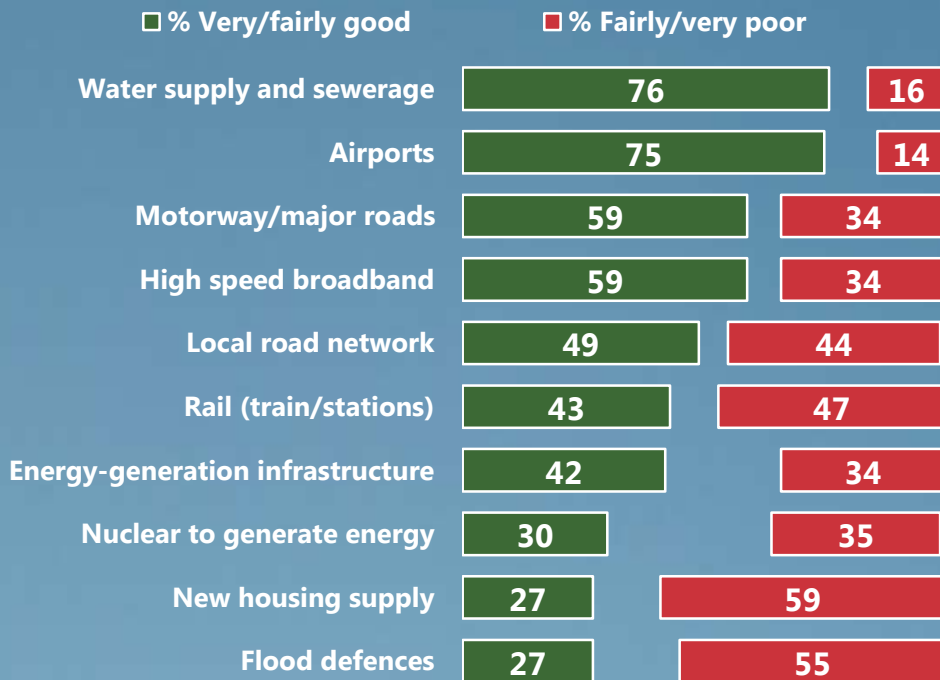
<http://reports.weforum.org/global-competitiveness-report-2015-2016/competitiveness-rankings>

Variation in ratings of different types

Q

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

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

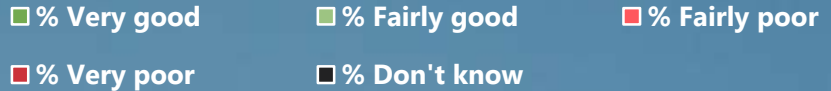


Transport

- Three-quarters of the public, 75%, rate airports positively.
- The public are more positive about the motorway/major road network than the local road network
- Ratings are worst for rail infrastructure (track/stations); despite slightly higher levels of 'don't know' relative to roads, a higher proportion rate rail infrastructure negatively.



Airports – positive ratings

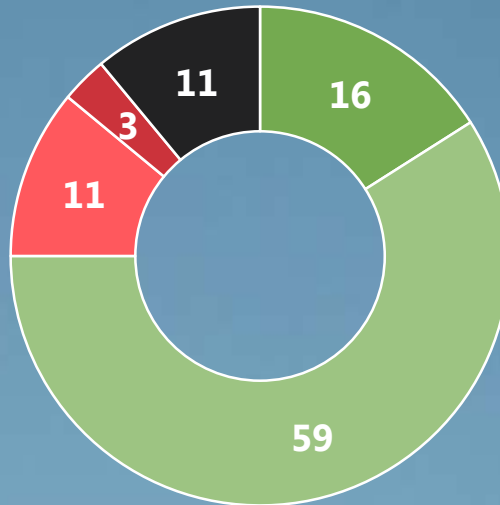


Q

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

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

Airports



Good	Poor
75%	14%

The SRN – 6 in 10 are positive

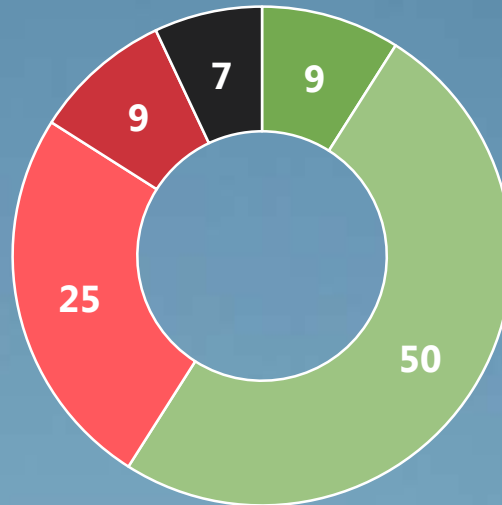
■ % Very good ■ % Fairly good ■ % Fairly poor
■ % Very poor ■ % Don't know

Q

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

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

The motorway/major road network



Good	Poor
59%	34%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Local roads – half are positive

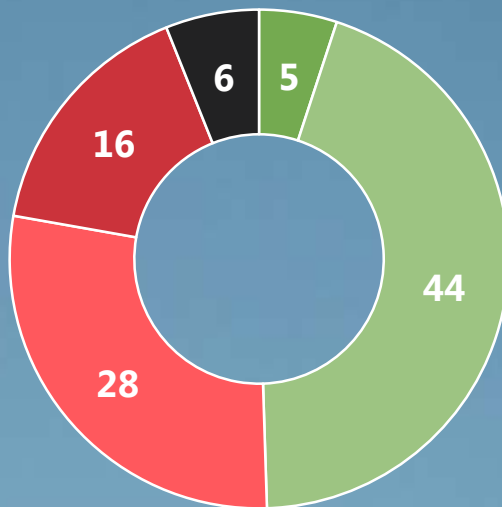


Q

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

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

The local road network



Good	Poor
49%	44%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Rail – more negative than positive

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

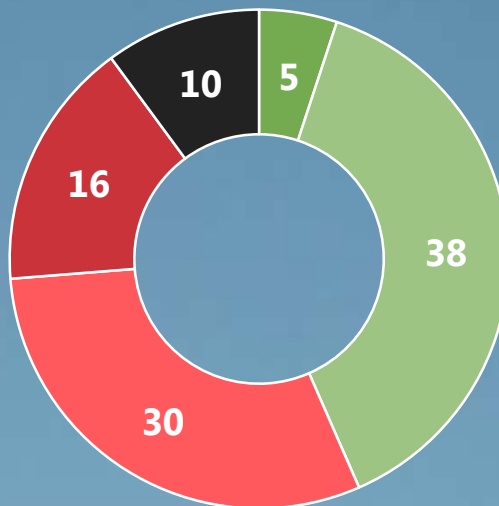
■ % Don't know

Q

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

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

Rail infrastructure – track/stations



Good	Poor
43%	47%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Housing supply

- 59% of the public rate new housing supply as fairly or very poor in Britain.
- This includes 27% rating this as very poor.
- Other Ipsos MORI research has found a strong conviction that housing supply is inadequate in terms of quantity and quality.



Housing supply – 6 in 10 are negative

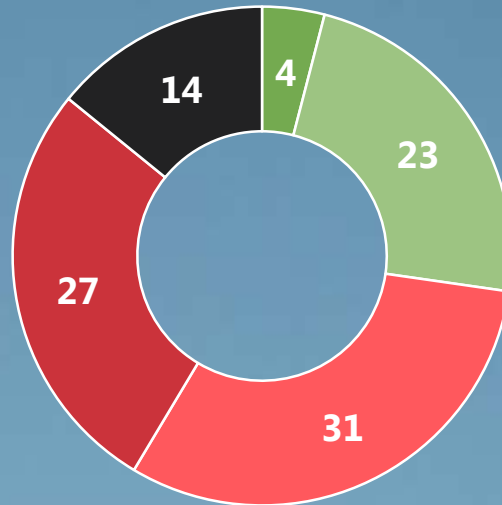
■ % Very good ■ % Fairly good ■ % Fairly poor
■ % Very poor ■ % Don't know

Q

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

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

New housing supply

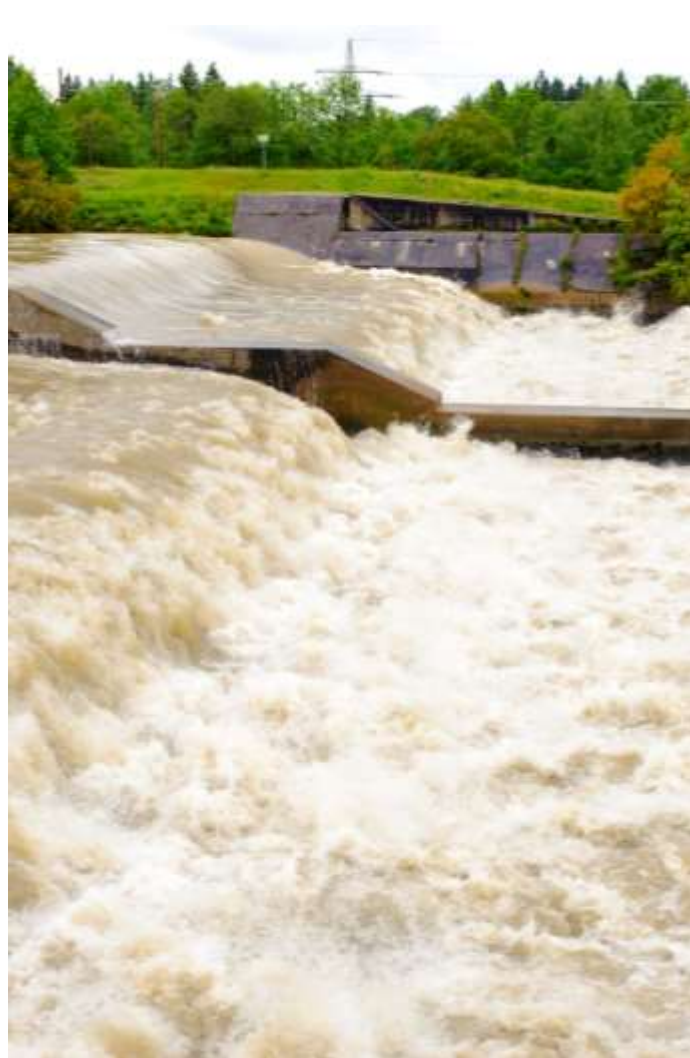


Good	Poor
27%	59%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Environment & energy

- The public are more negative than positive about flood defences by a margin of 2:1.
- 42% are positive about energy-generation infrastructure (excluding nuclear), but 34% are negative, and 24% say they don't know.
- Even more, 34%, do not offer an opinion on nuclear infrastructure but, among those who do, the balance is more negative than positive.



Flood defences – public negative by 2:1

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

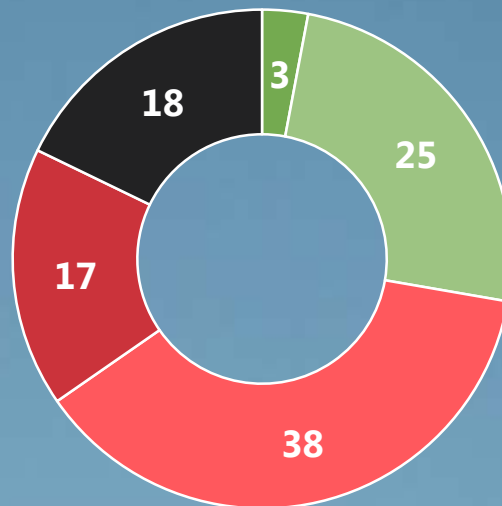
■ % Don't know

Q

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

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

Flood defences



Good	Poor
27%	55%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Non-nuclear energy – views more mixed

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

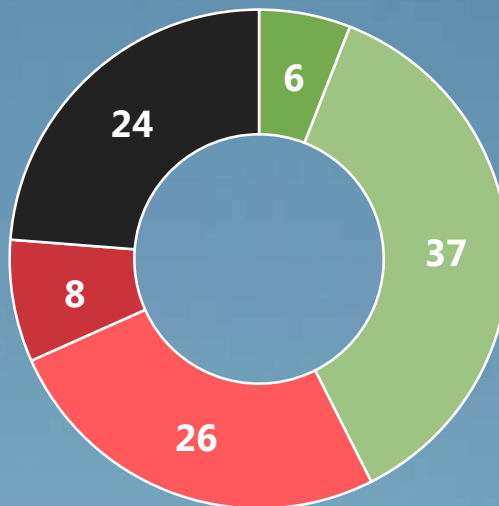
■ % Don't know

Q

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

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

Energy-generation infrastructure (excluding nuclear)



Good	Poor
42%	34%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Nuclear – a third don't know

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

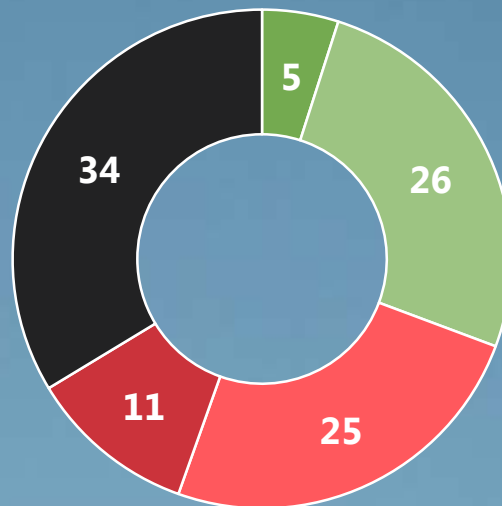
■ % Don't know

Q

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

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

Nuclear infrastructure to generate energy



Good	Poor
30%	35%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Other utilities

- 20% rate water supply and sewerage as very good, with a further 55% judging it fairly good.
- This makes this the top-rated infrastructure in Britain (although only just above airports).
- Broadband attracts worse ratings although the 34% very/fairly poor compares to 59% very/fairly good.



Water supply etc. – ‘good’ by more than 4:1

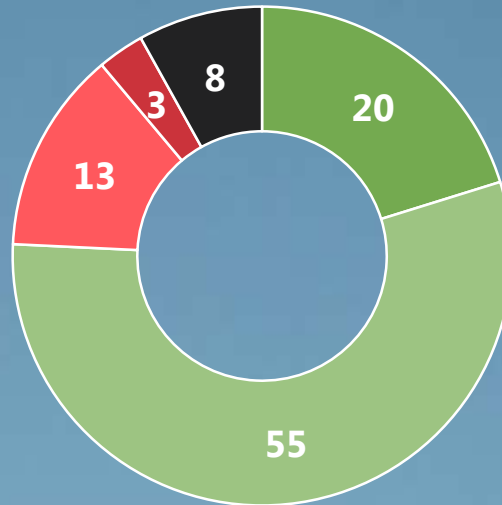
- % Very good
- % Fairly good
- % Fairly poor
- % Very poor
- % Don't know

Q

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

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

Water supply and sewerage



Good	Poor
76%	16%

Broadband – more positive than negative

■ % Very good

■ % Fairly good

■ % Fairly poor

■ % Very poor

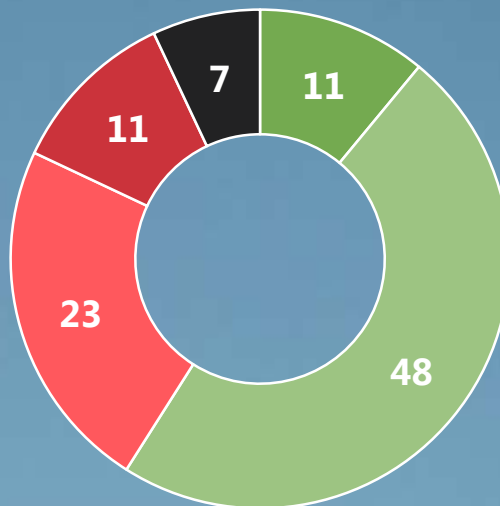
■ % Don't know

Q

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

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

High speed broadband



Good	Poor
59%	34%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Rail infrastructure weaker vs other G8

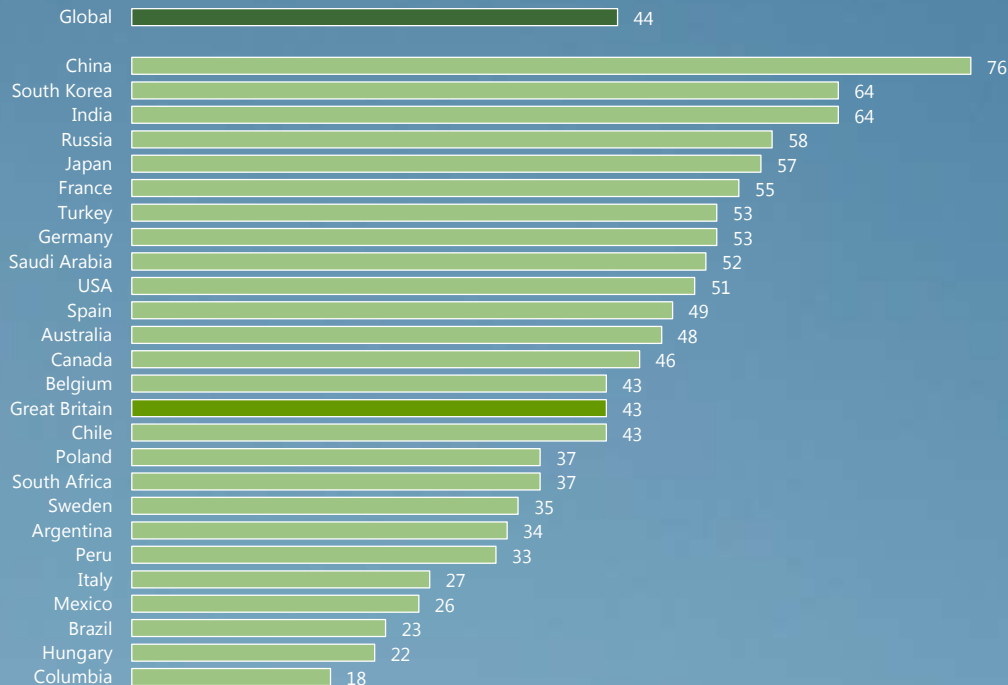
Q

% very/fairly good

These next questions are about different types of infrastructure.

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

Rail infrastructure – track/stations



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

But new housing supply weakest

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



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

Attitudes

- 60% 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.
- Twice as many are comfortable with the idea of foreign investment in new infrastructure (42% against 20%) if it means that projects can be delivered more quickly.
- At the same time, though, 67% justify delays to infrastructure projects if it means that local communities' views can be heard properly.



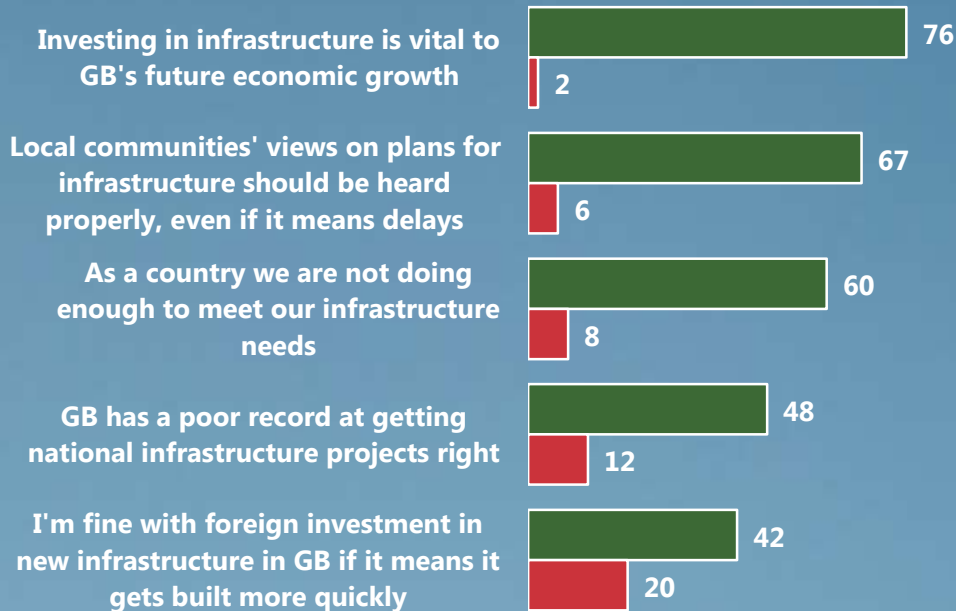
Attitudes push in different directions

■ % Strongly/tend to agree

■ % Strongly/tend to disagree

Q

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



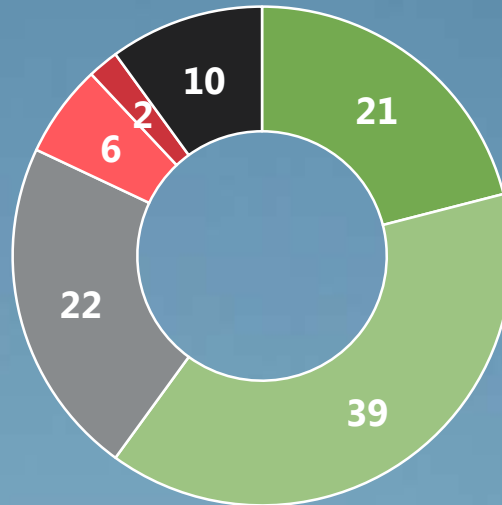
Sense that not doing enough

- % 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
60%	8%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

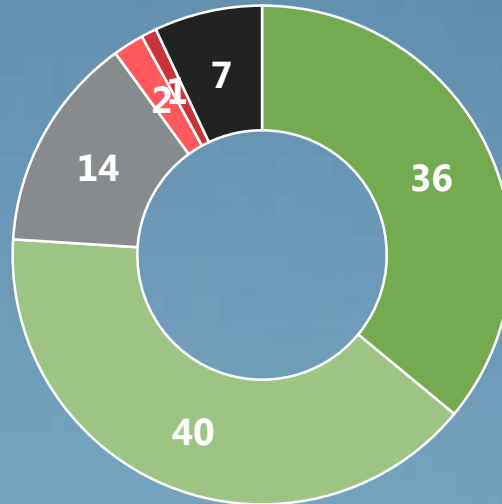
Infrastructure vital to growth

■ % 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 GB's future economic growth



Agree	Disagree
76%	2%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

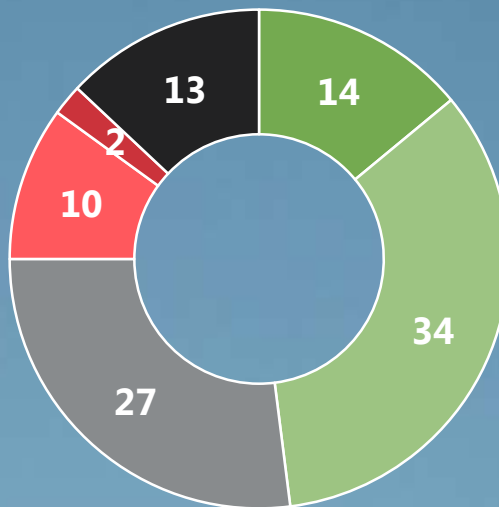
By 4:1 we have a poor record

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

Q

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

GB has a poor record at getting national infrastructure projects right



Agree	Disagree
48%	12%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

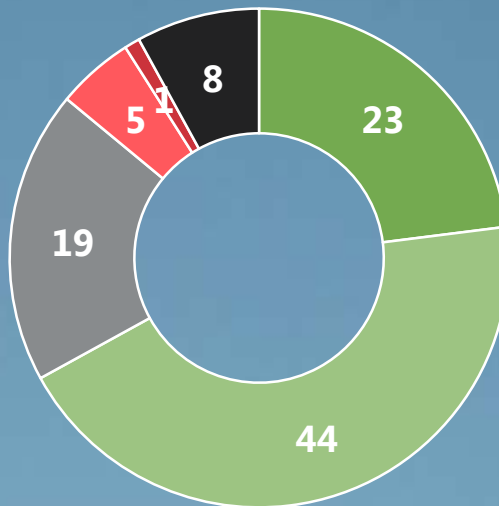
Local views matter

■ % 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



Agree	Disagree
67%	6%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

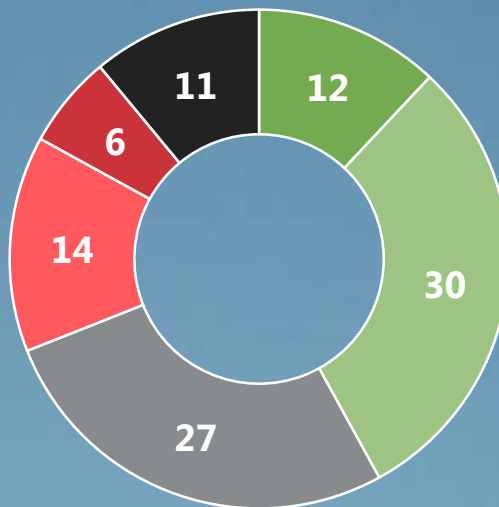
Plurality fine with foreign investment

■ % 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 GB if it means it gets built more quickly



Agree	Disagree
42%	20%

Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Priorities

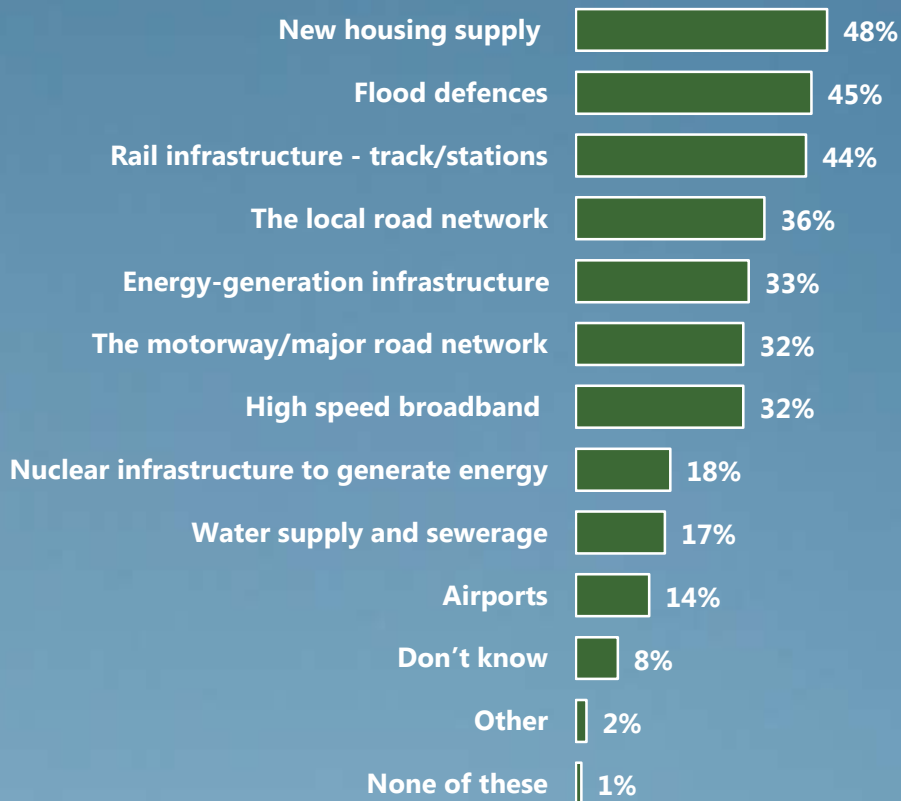
- Priorities for investment are housing supply (48% choose this from a list), flood defences (45%) and rail infrastructure (44%).
- 44% back Government borrowing money to fund investment in better/more infrastructure, with 16% opposed and 40% unsure either way.



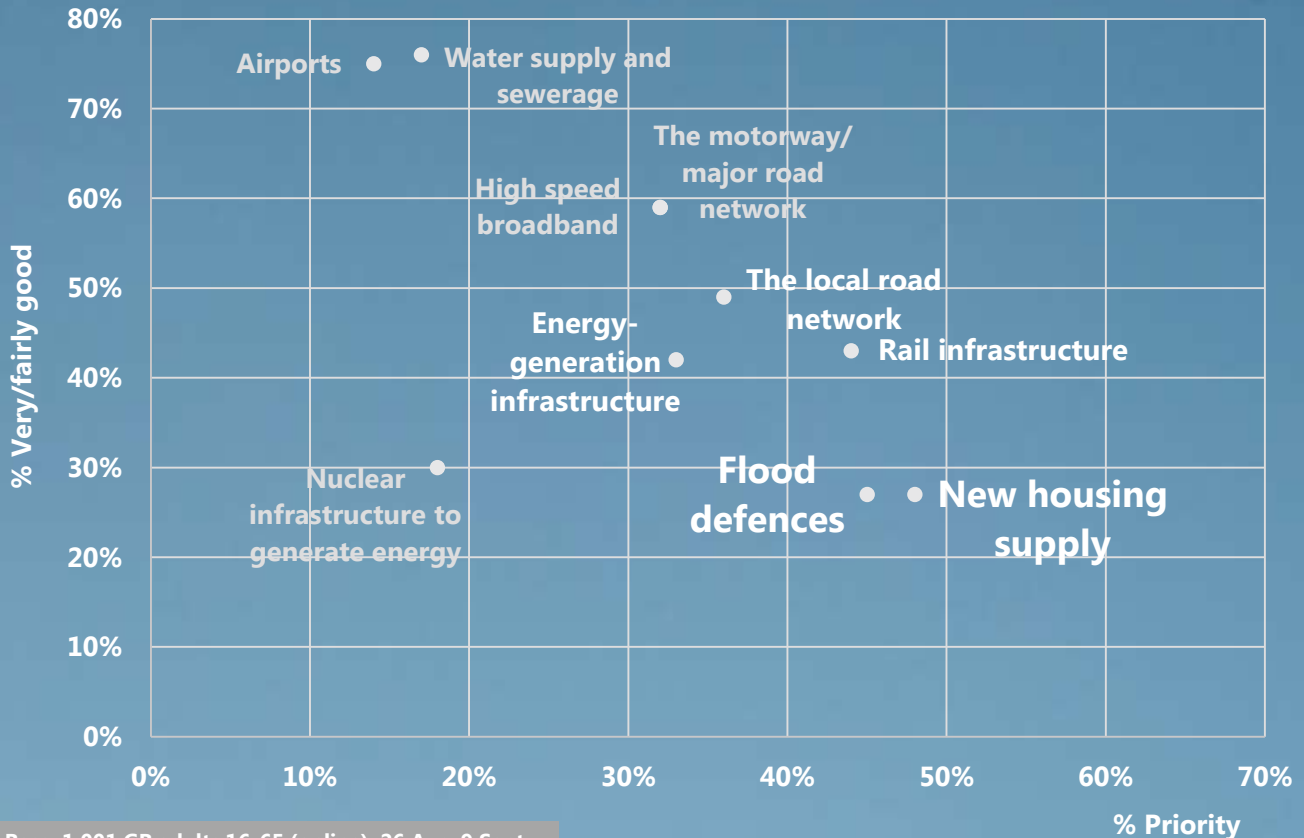
Housing, flood defence, rail are top priorities

Q

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



Summary: priorities vs ratings



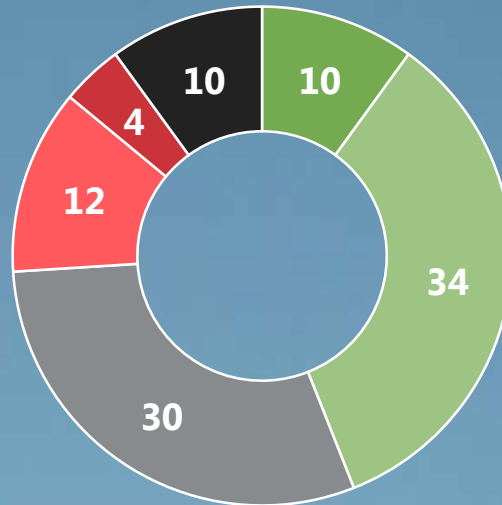
Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

More support borrowing than don't

■ % 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 GB borrowing money to fund the building of more/better infrastructure?



Base: 1,001 GB adults 16-65 (online), 26 Aug-9 Sept

Support	Oppose
44%	16%

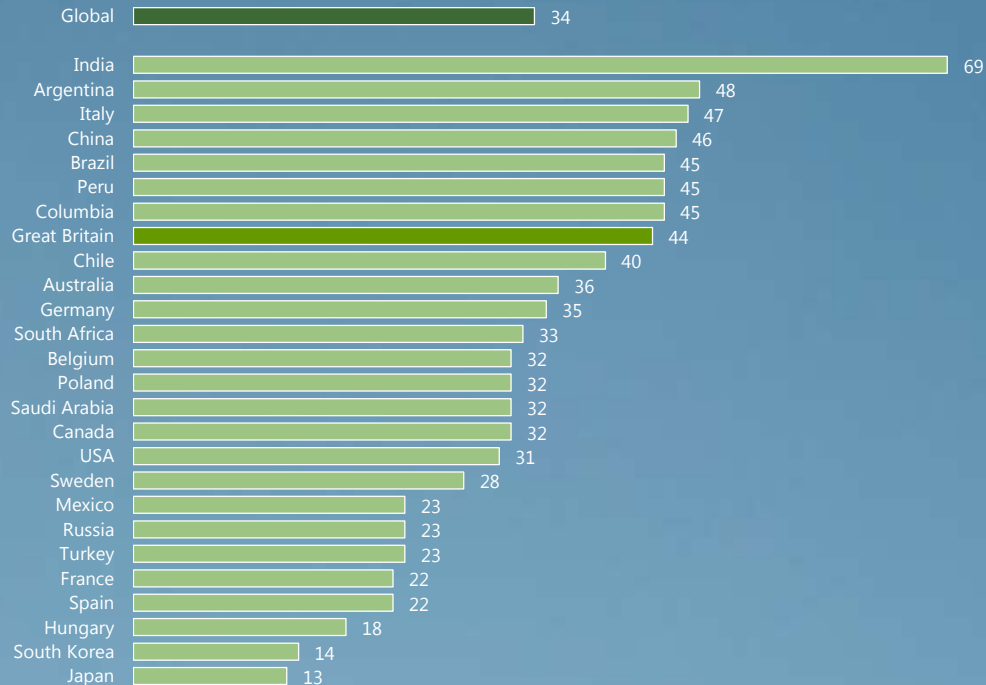
Relatively more supportive of borrow-to-

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: new housing supply and rail among top priorities (new housing supply is especially weak by global standards).

Public more comfortable than not with idea of foreign investment if it speeds progress. But also resistant to compromising proper hearing of local communities' views.



Ipsos MORI

Further information

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Ipsos MORI Infrastructure

Ipsos MORI Infrastructure works with infrastructure leaders to provide community, customer, and stakeholder insights, supporting infrastructure design, delivery and marketing.