



# Global Infrastructure

## Public satisfaction and priorities

October 2016



# Methodology

- These are the findings of the first Ipsos Infrastructure Index conducted via Global Advisor.
- In total 18,517 interviews were conducted between 26 August and 9 September 2016 among adults aged 18-64 in the US and Canada, and adults aged 16-64 in all other countries.
- The survey was conducted in 26 countries around the world via the Ipsos Online Panel system: Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Columbia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.



# Methodology

- Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Chile, Columbia, Hungary, India, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.
- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/- 3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.
- In countries where internet penetration is approximately 60% or higher the data output generally reflects the overall population. Of the 26 countries surveyed, some yield results that are balanced to reflect the general population – Argentina, Australia, Belgium, Canada, China, France, Germany, Hungary, Italy, Japan, Poland, South Korea, Russia, Saudi Arabia, Spain, Sweden, Great Britain and the United States. The remaining countries surveyed – Brazil, Chile, Columbia, India, Mexico, Peru, South Africa, and Turkey – have lower levels of internet connectivity and reflect online populations that tend to be more urban and have higher education/income than the general 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.
- Data are weighted to match the profile of the population.

# Satisfaction with national infrastructure



# National infrastructure

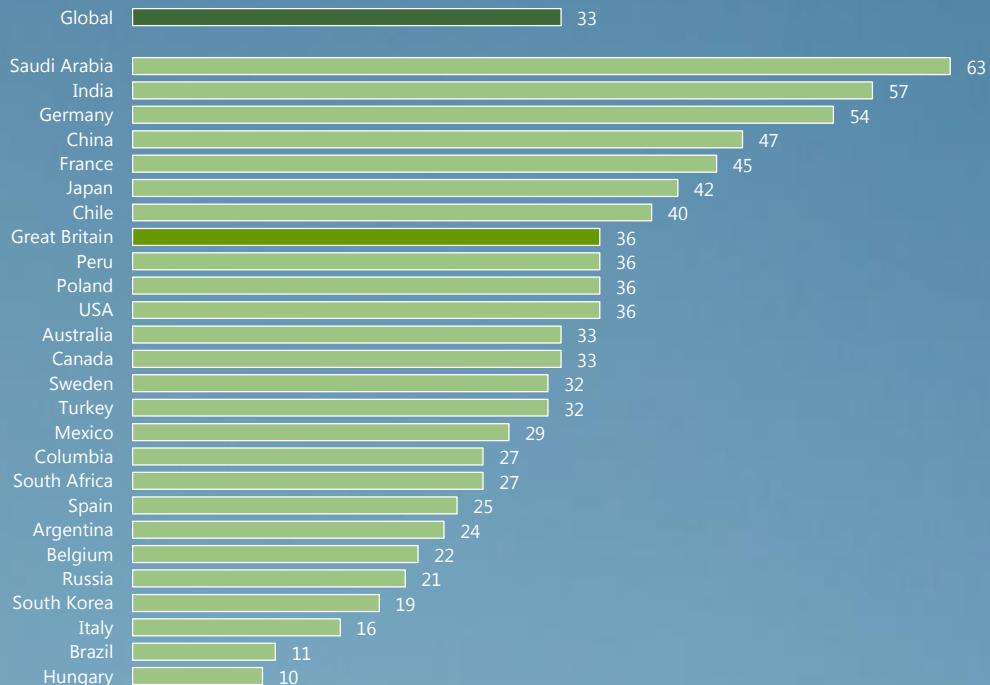
Q

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?

% very/fairly satisfied



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

# National infrastructure

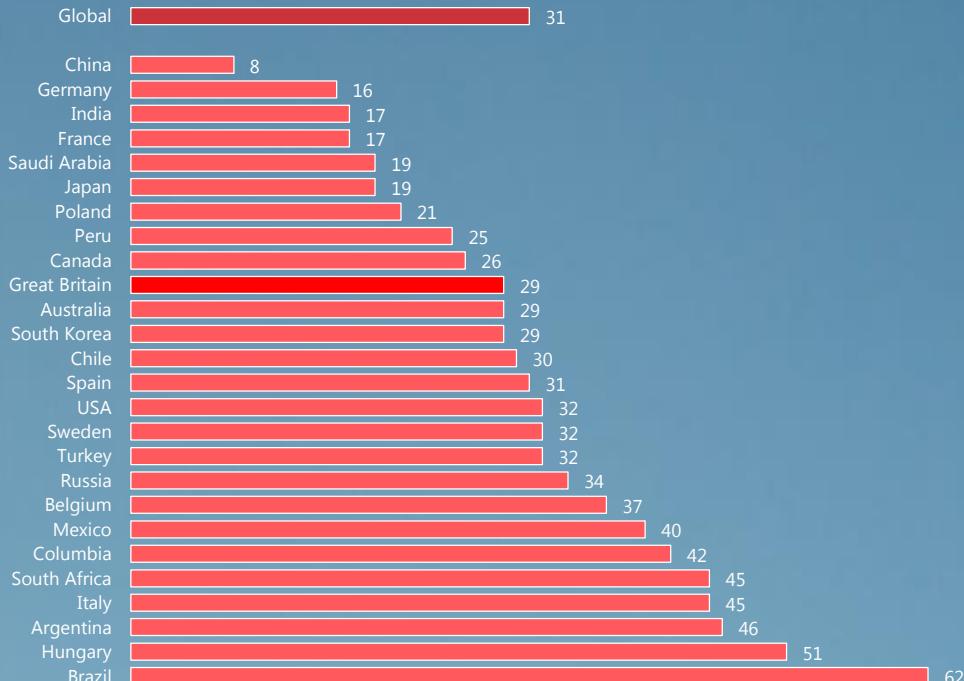
Q

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?

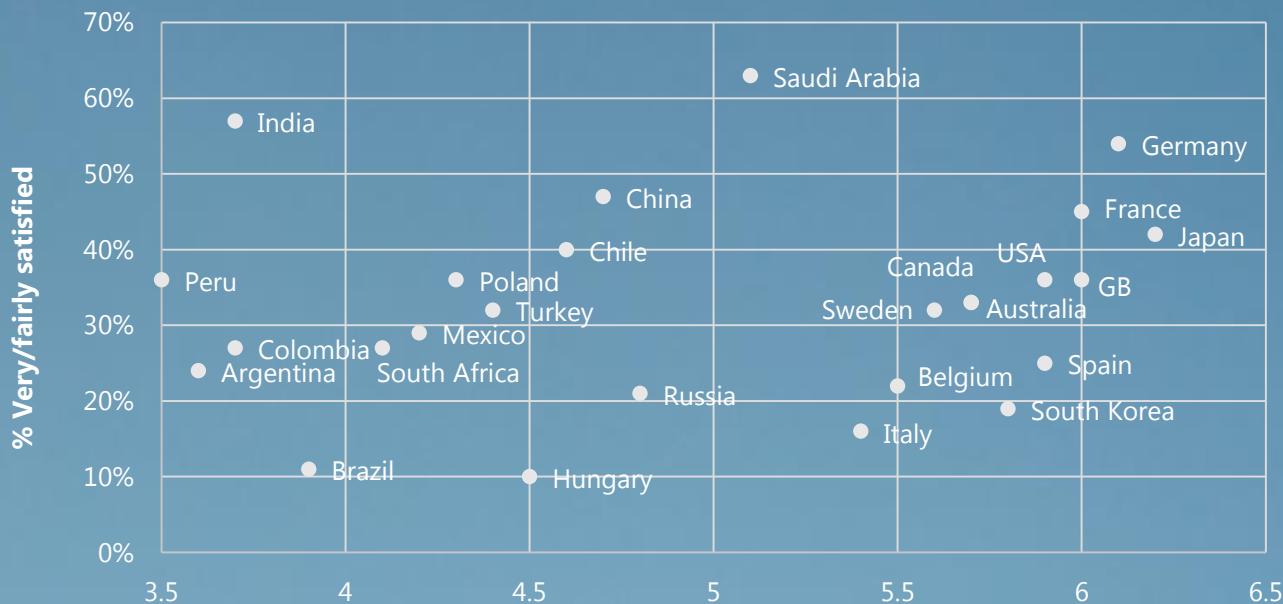
% very/fairly dissatisfied



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>

# Ratings of types of infrastructure



# Airports

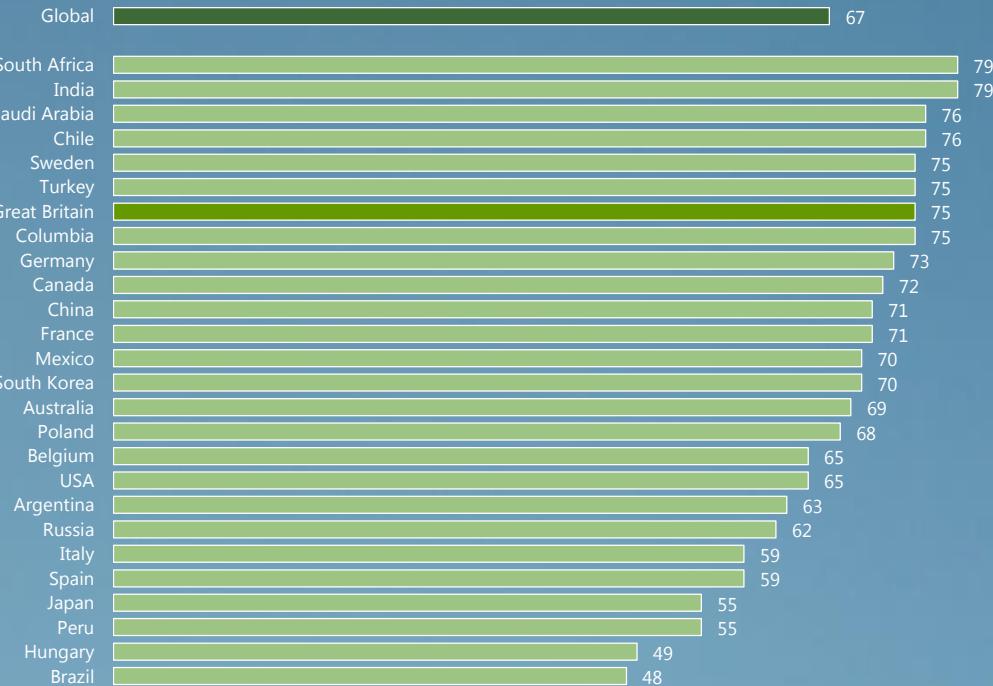
Q

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



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

# Motorway/major road network

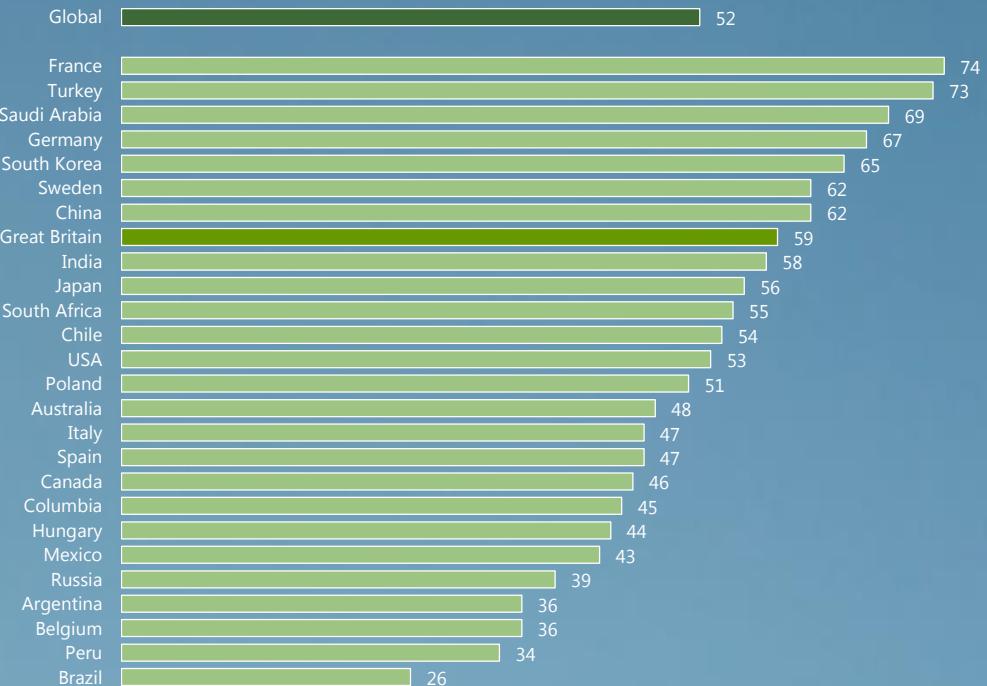
Q

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]...

The motorway/major  
road network

% very/fairly good



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

# Local road network

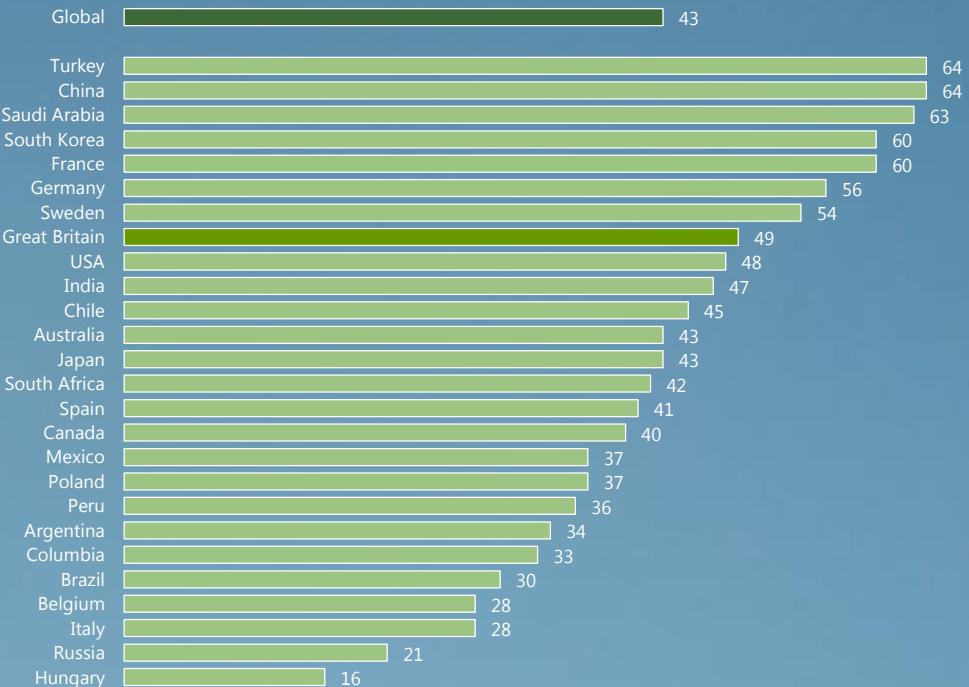
Q

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]...

The local road  
network

% very/fairly good



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

# Rail infrastructure

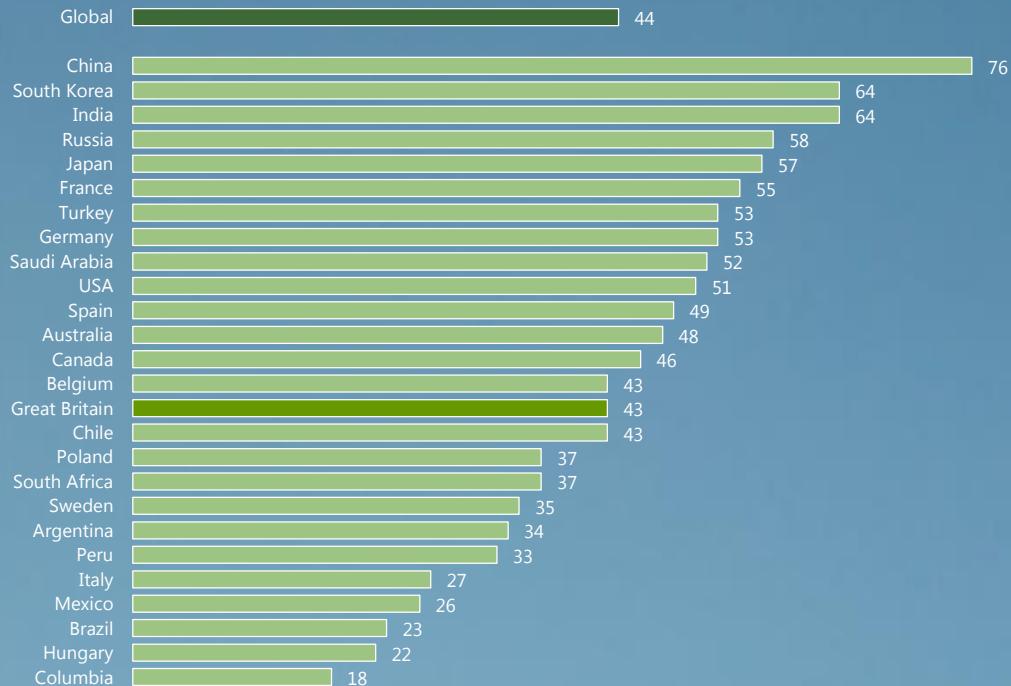
Q

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



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

# New housing supply

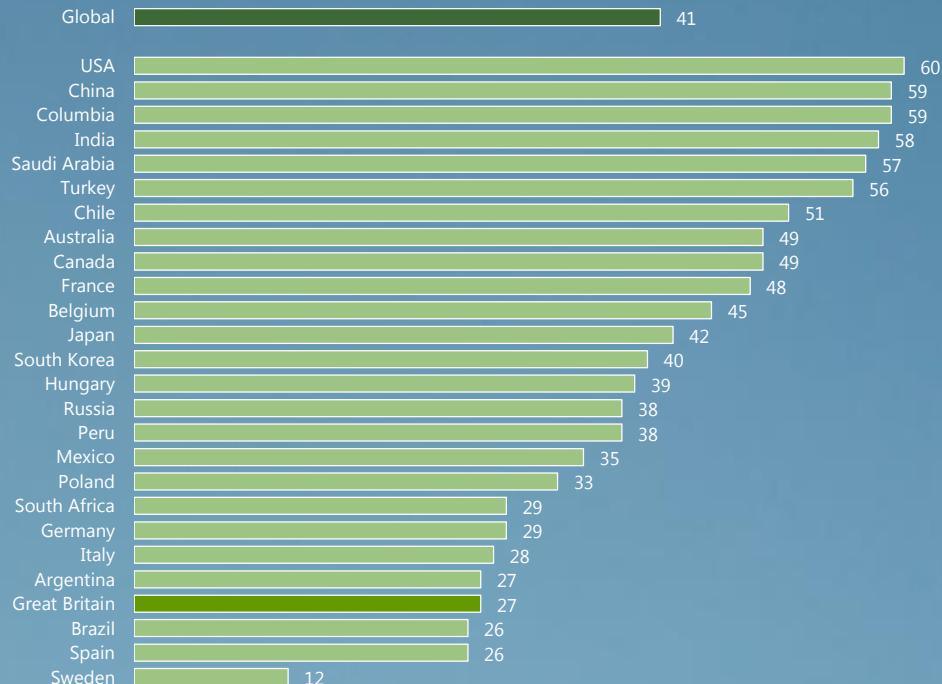
Q

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



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

# Flood defences

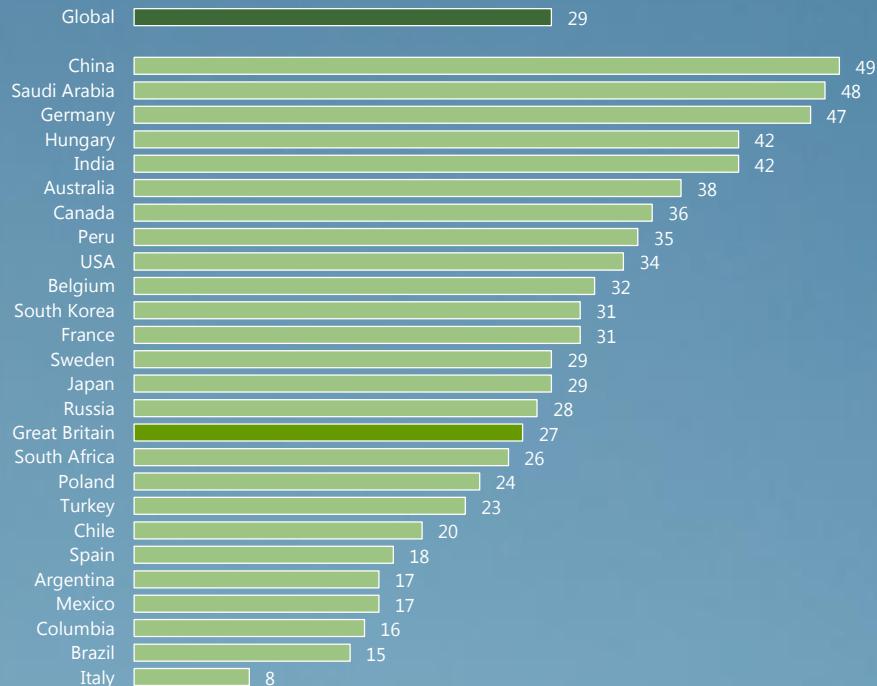
Q

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



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

# Energy (not nuclear)

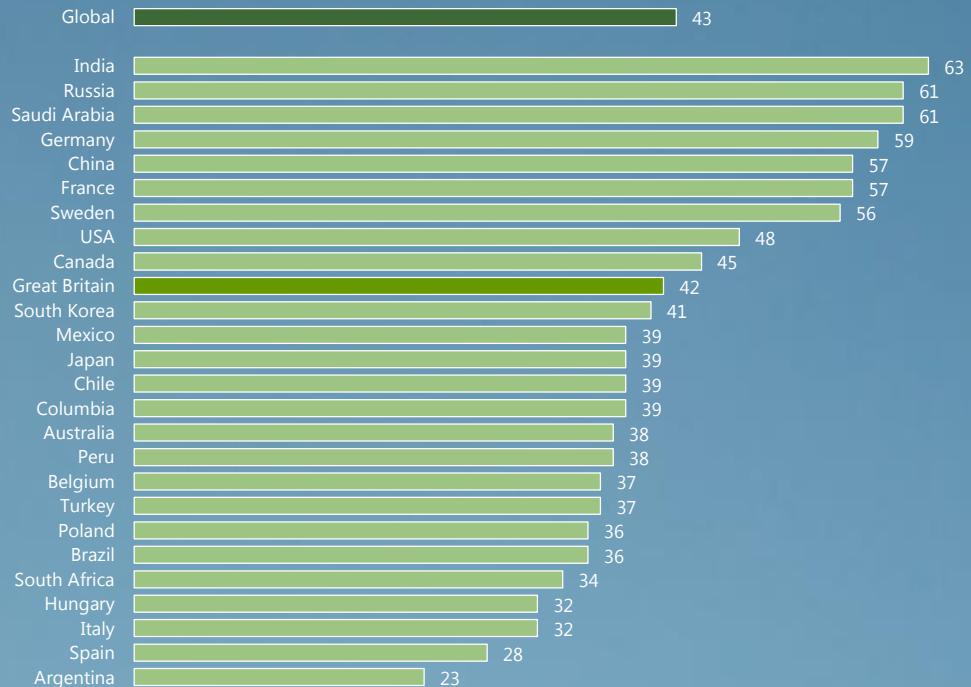
Q

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]...

Energy-generation  
infrastructure  
(excluding nuclear)

% very/fairly good



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

# 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



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

# Water supply & sewerage

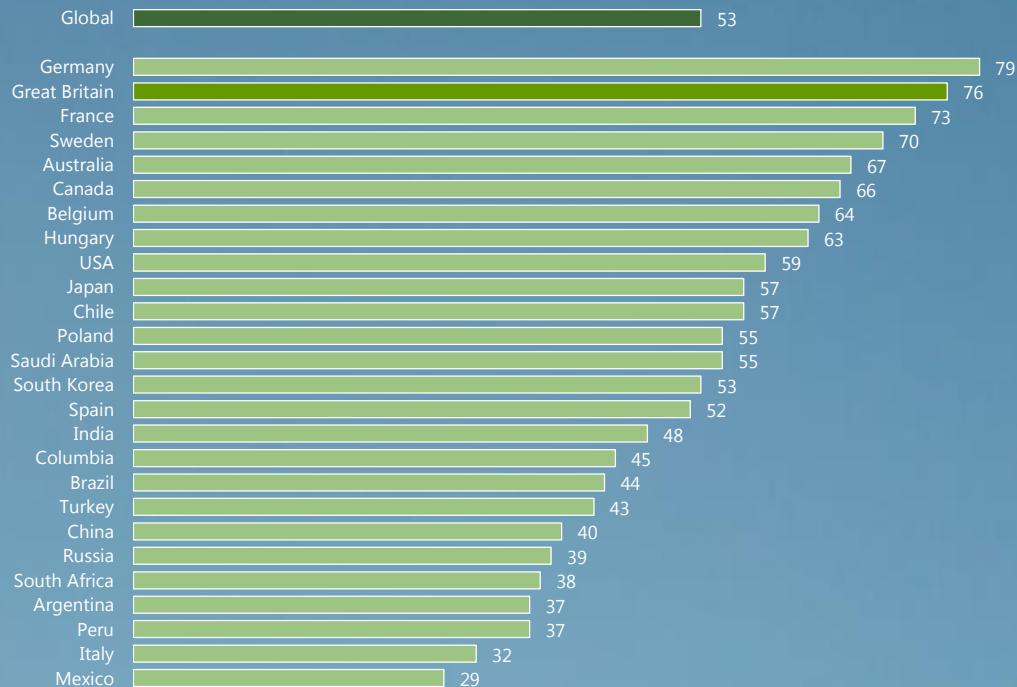
Q

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



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

# High speed broadband

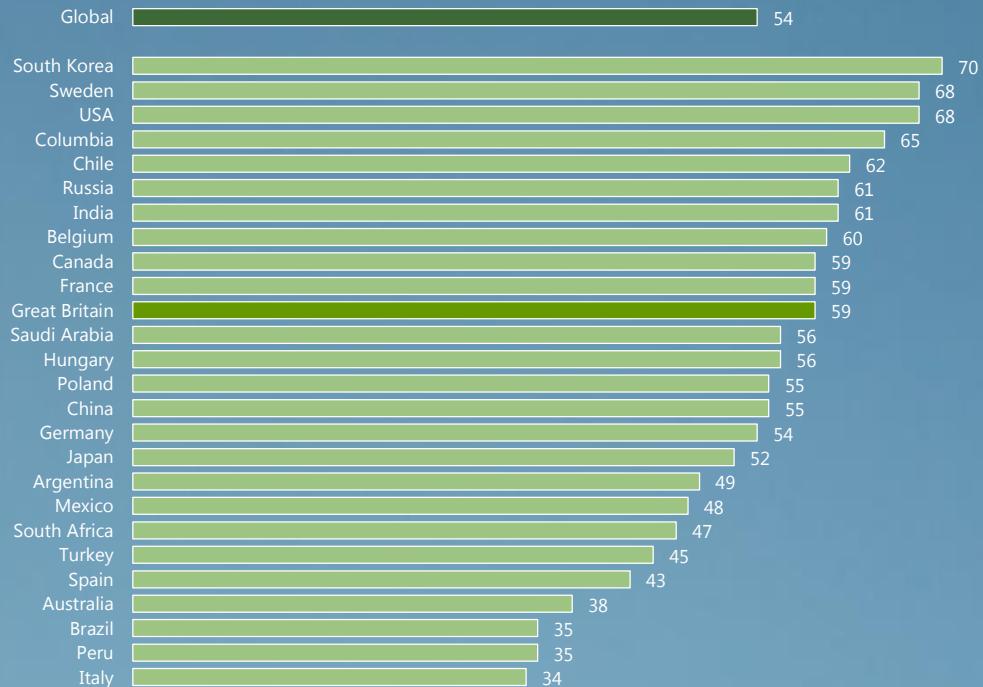
Q

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



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

# Attitudes to infrastructure delivery & funding



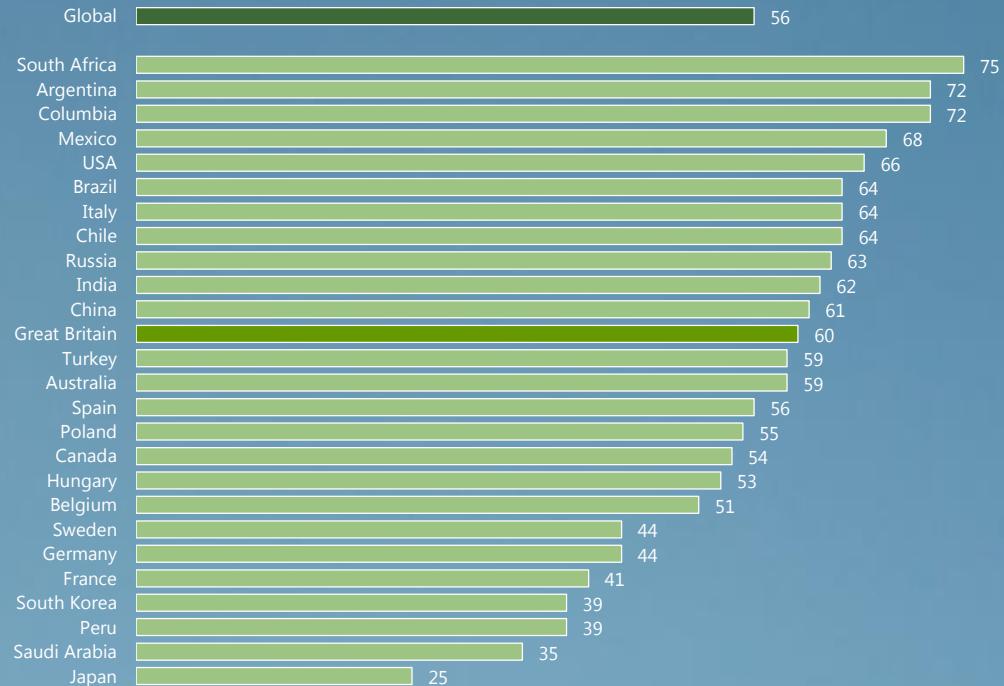
# Not doing enough?

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



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

# Investment vital to growth

Q

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

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

% strongly/tend to agree



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

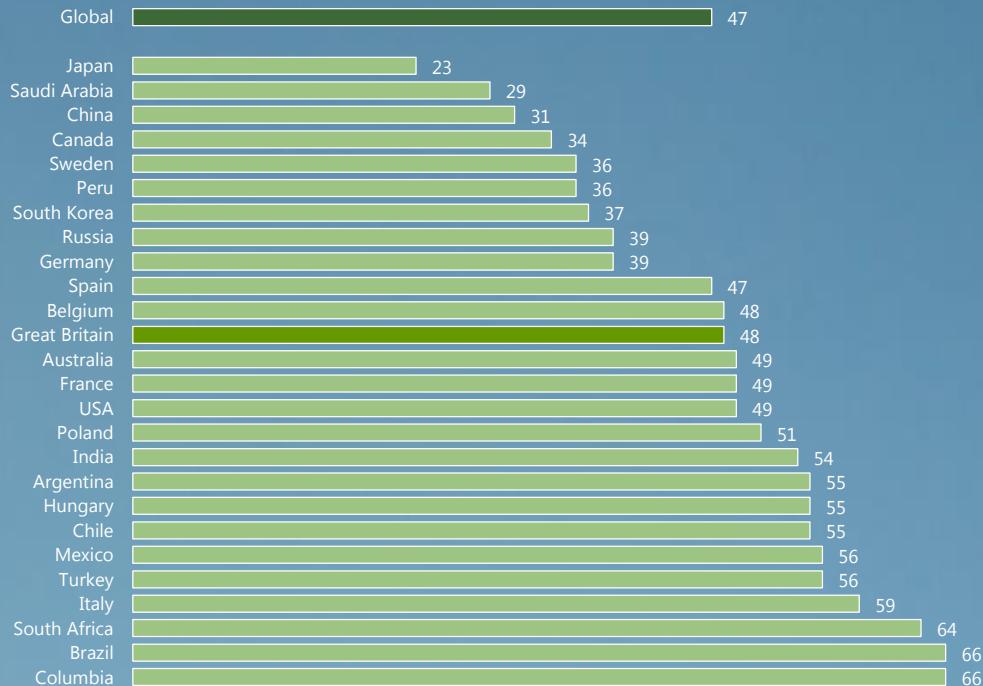
# Poor record?

Q

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

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

% strongly/tend to agree



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

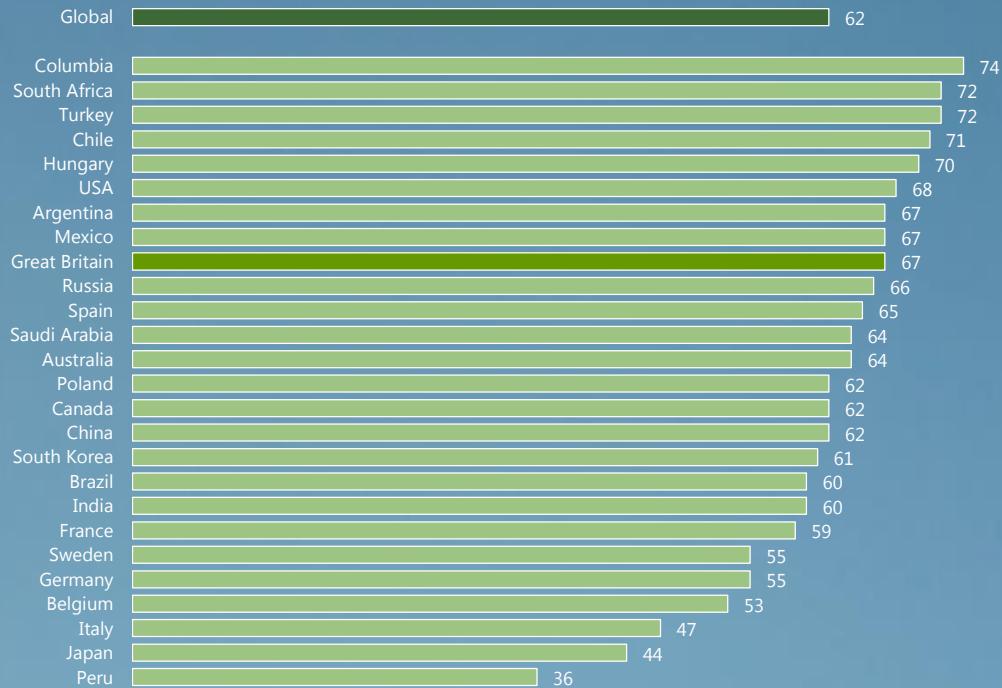
# Local views

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



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

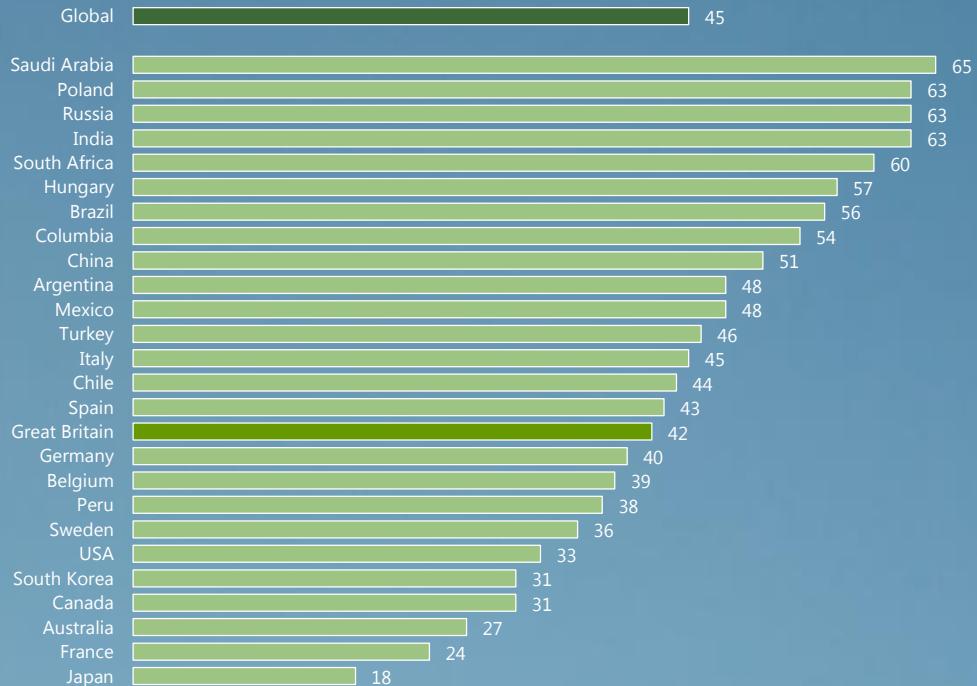
# Foreign investment

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



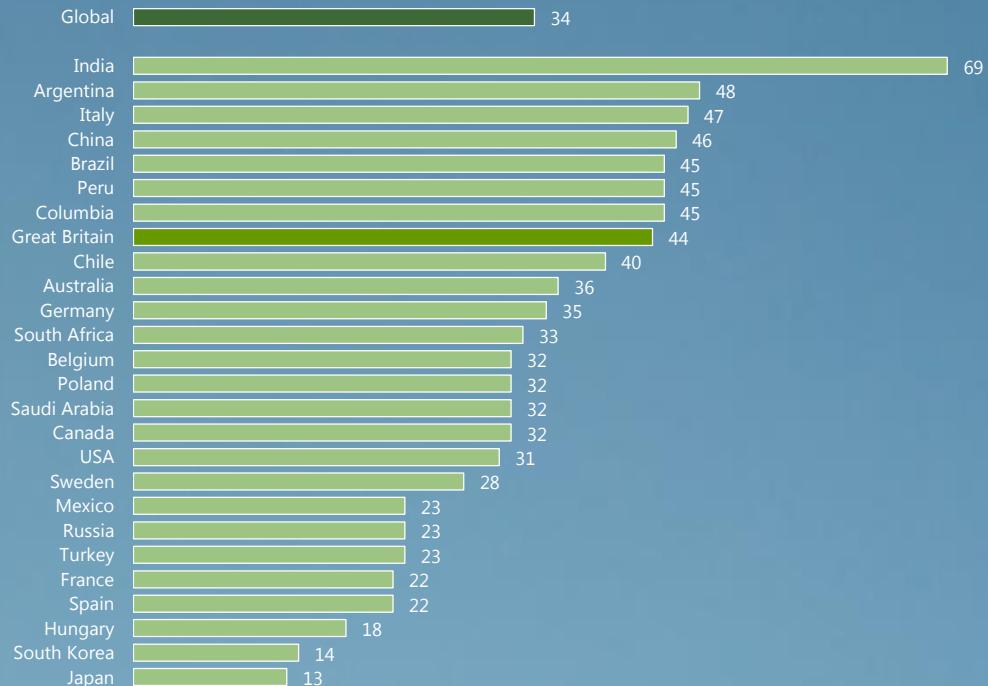
Base: 18,517 adults (online), 26 Aug-9 Sept

# Borrow-to-build

Q

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

% strongly/tend to support



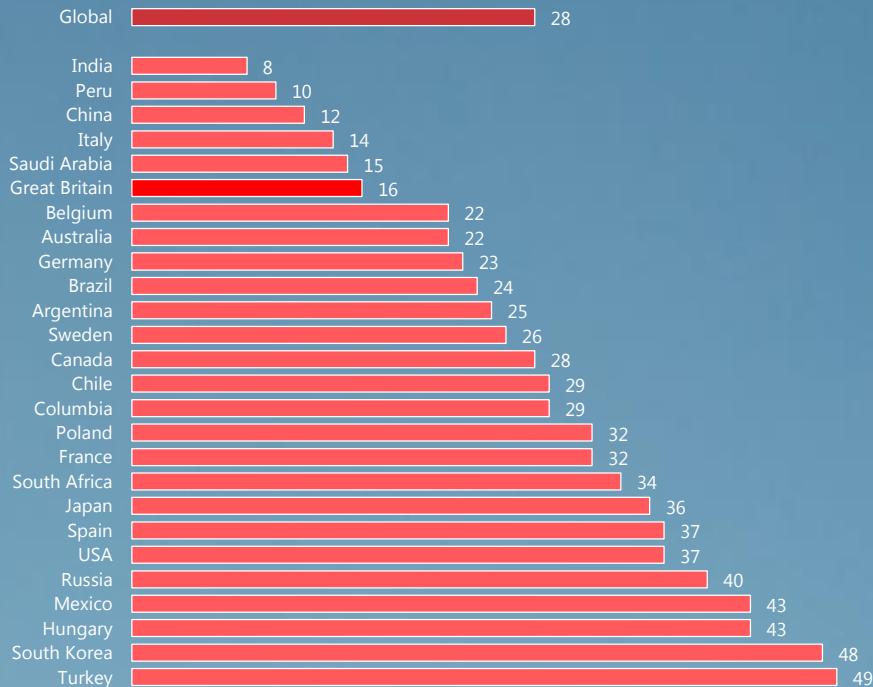
Base: 18,517 adults (online), 26 Aug-9 Sept

# Borrow-to-build

Q

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

**% strongly/tend to oppose**



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

# Contacts

## **Chris Jackson**

Vice President, US,  
Ipsos Public Affairs



+001 202 420 2025

## **Ben Marshall**

Research Director,  
Ipsos MORI UK



+44 20 7347 3461





Ipsos ranks third in the global research industry. With a strong presence in 87 countries, Ipsos employs more than 16,000 people and has the ability to conduct research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multi-specialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

Ipsos is listed on Eurolist - NYSE-Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

[www.ipsos.com](http://www.ipsos.com)

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” - our tagline - summarises our ambition.