

Global Infrastructure Index

**Public satisfaction and
priorities – 2020**

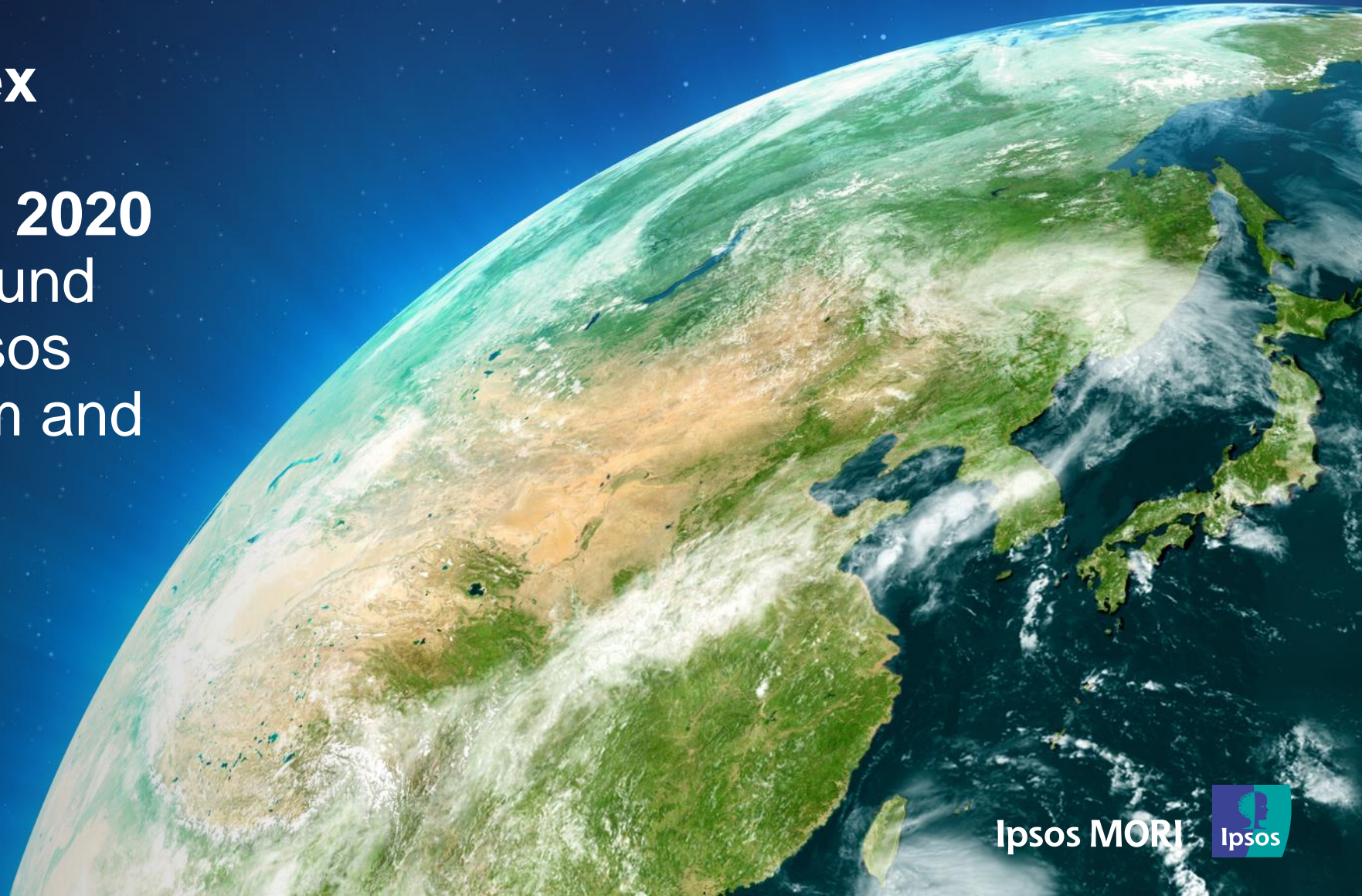
Global and Great Britain



Ipsos MORI



These are the findings of the fifth **Global Infrastructure Index** conducted between **24 July – 7 August 2020** in **27 countries** around the world via the Ipsos Online Panel system and involving **19,516** participants.



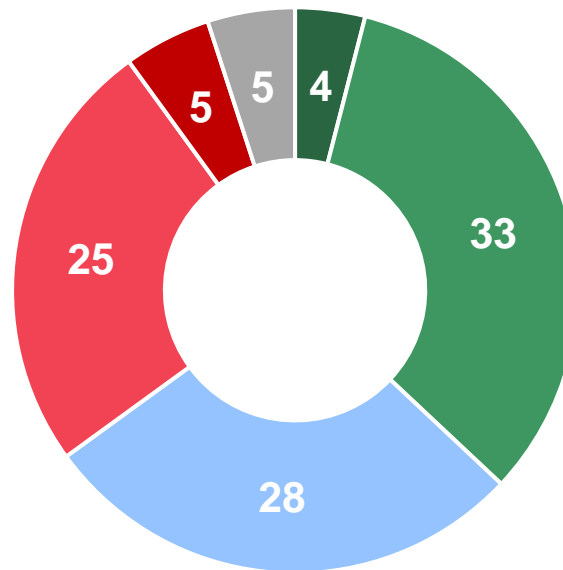
In Britain, satisfaction levels have changed little since 2019

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



2020:	
Satisfied	Dissatisfied
37%	30%
2019:	
Satisfied	Dissatisfied
36%	29%
2018:	
Satisfied	Dissatisfied
29%	33%
2017:	
Satisfied	Dissatisfied
34%	32%
2016:	
Satisfied	Dissatisfied
36%	29%

Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

2020 ratings are lower than the global average with dissatisfaction higher than average across G8 and European countries

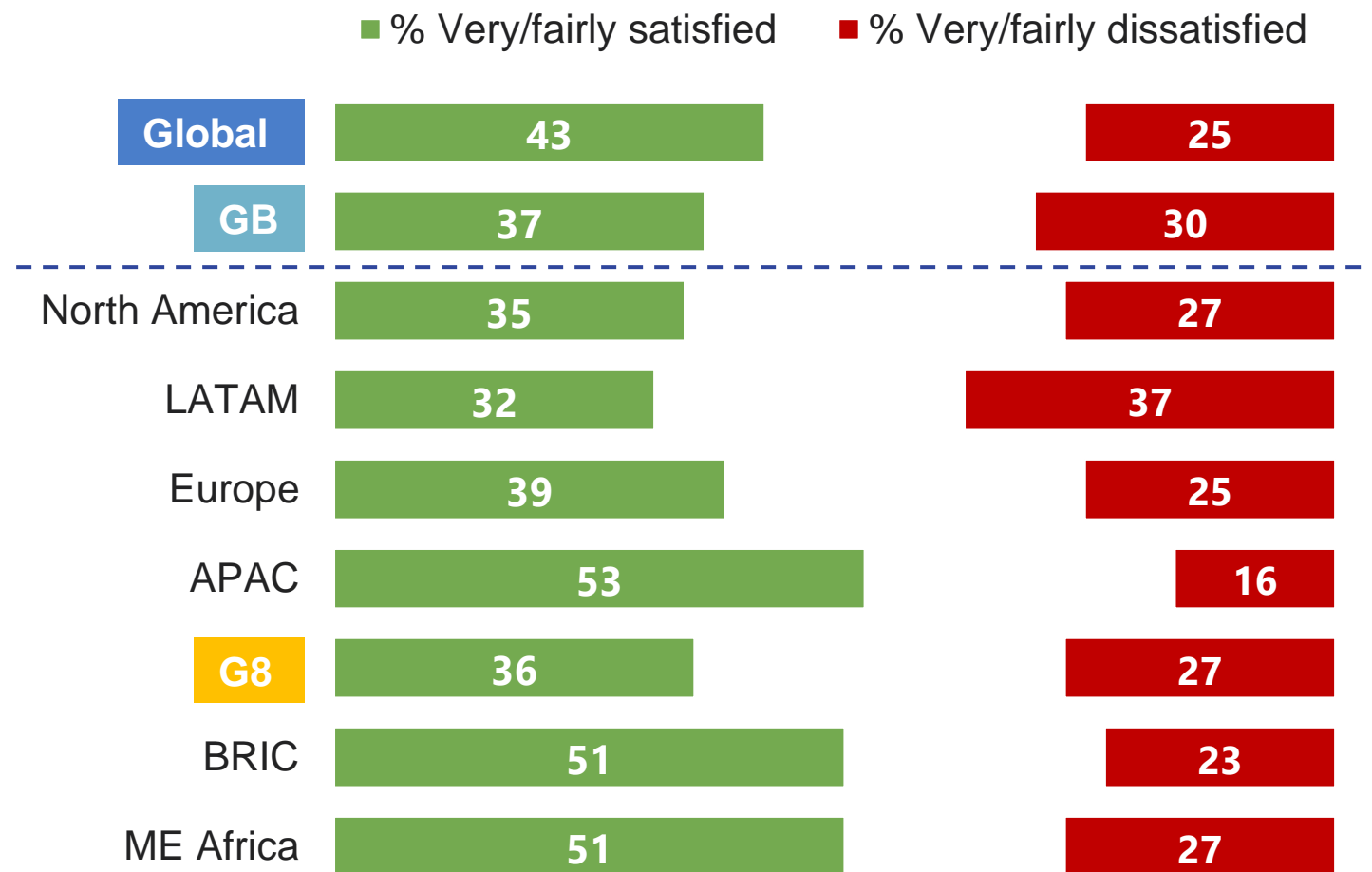
Q. We now want you to think about [COUNTRY'S] infrastructure.

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?

See slide 28 for regional classifications

Source: Ipsos/GIIA



Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

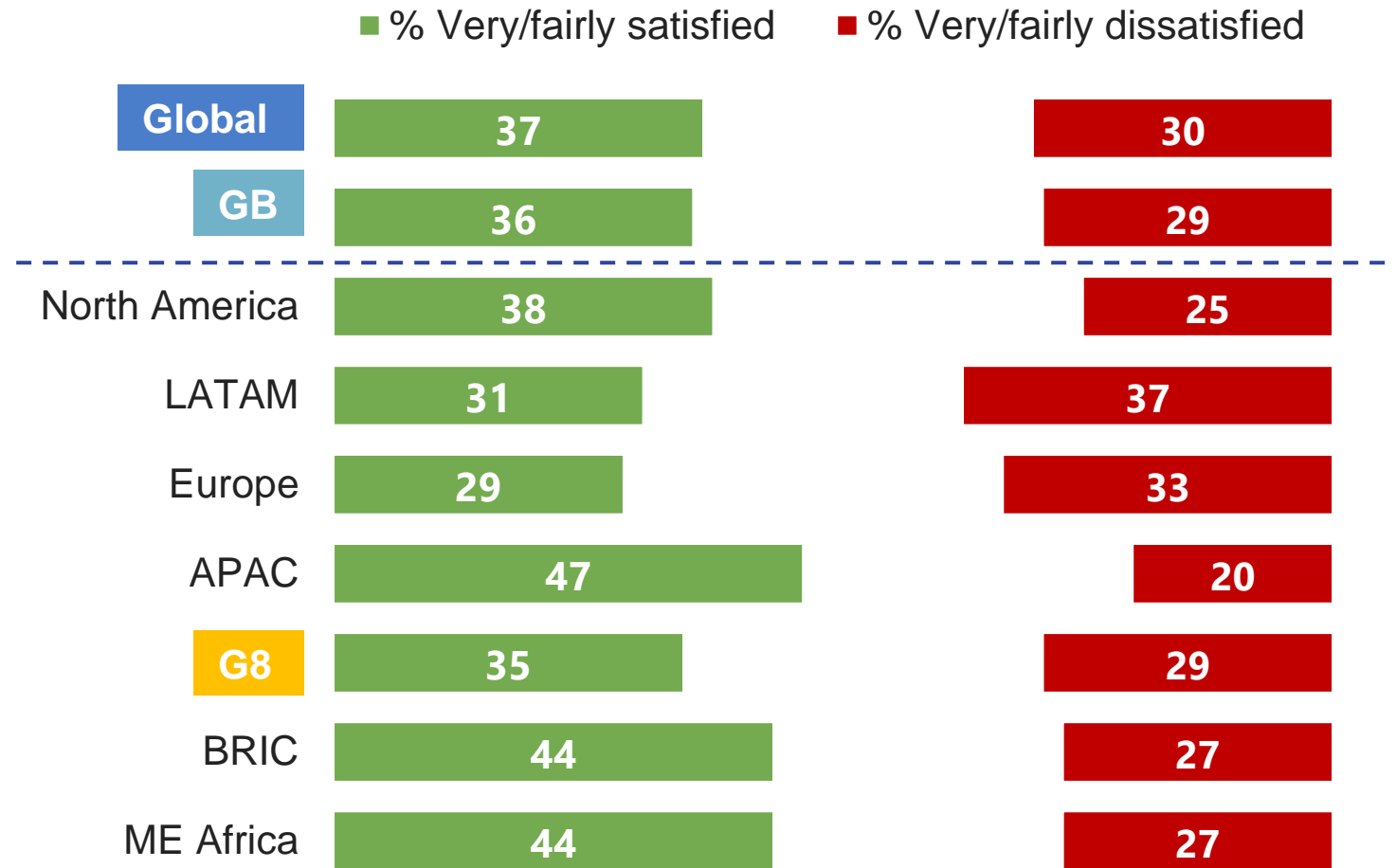
Vs 2019: sharpest improvements in BRIC and ME Africa, with positive ratings up globally by 6 points year-on-year

N.B. the 2016-20 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?



Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2019

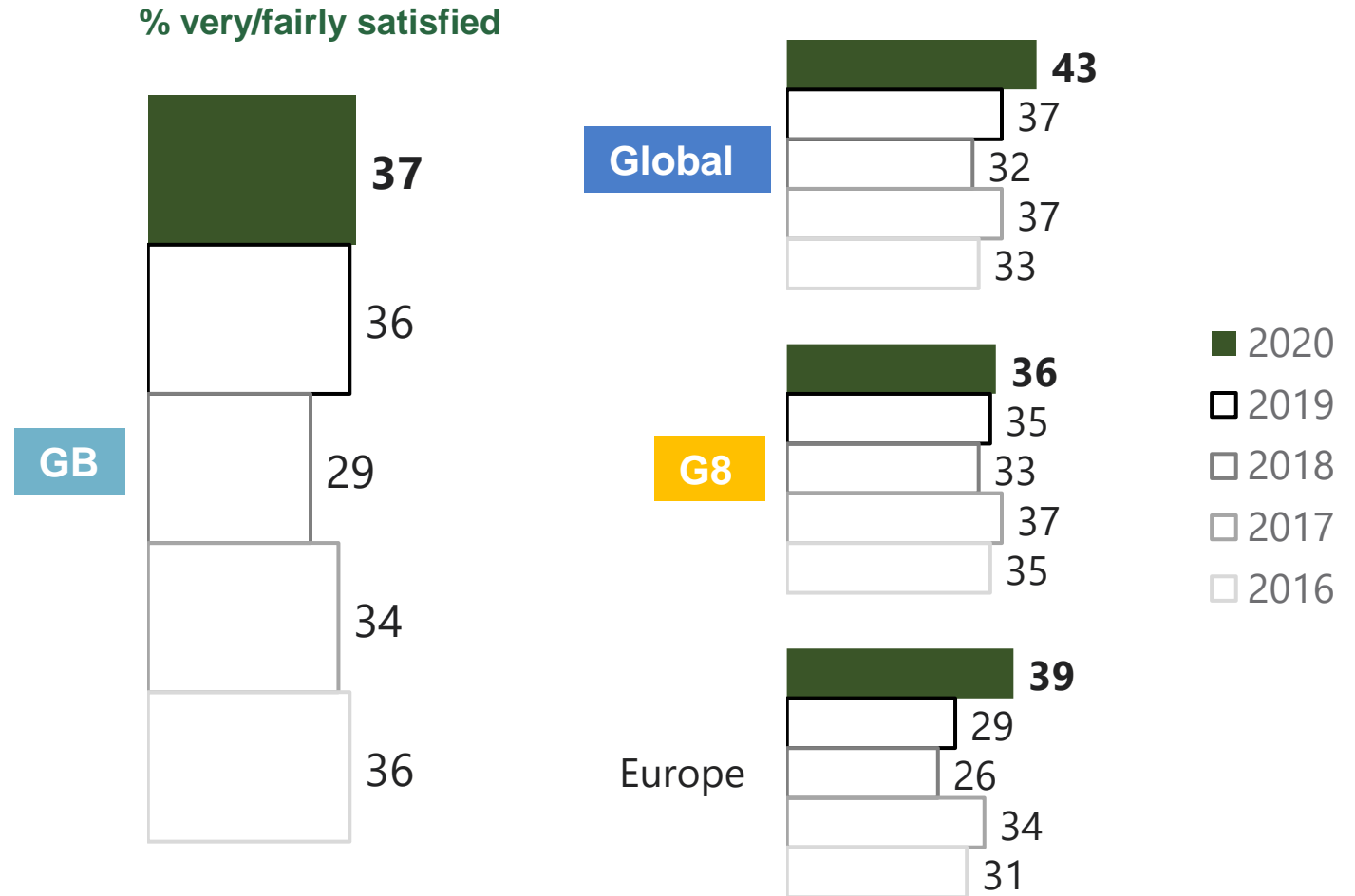
Satisfaction levels in Britain dipped in 2018, and did the same elsewhere

N.B. the 2016-20 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?



Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

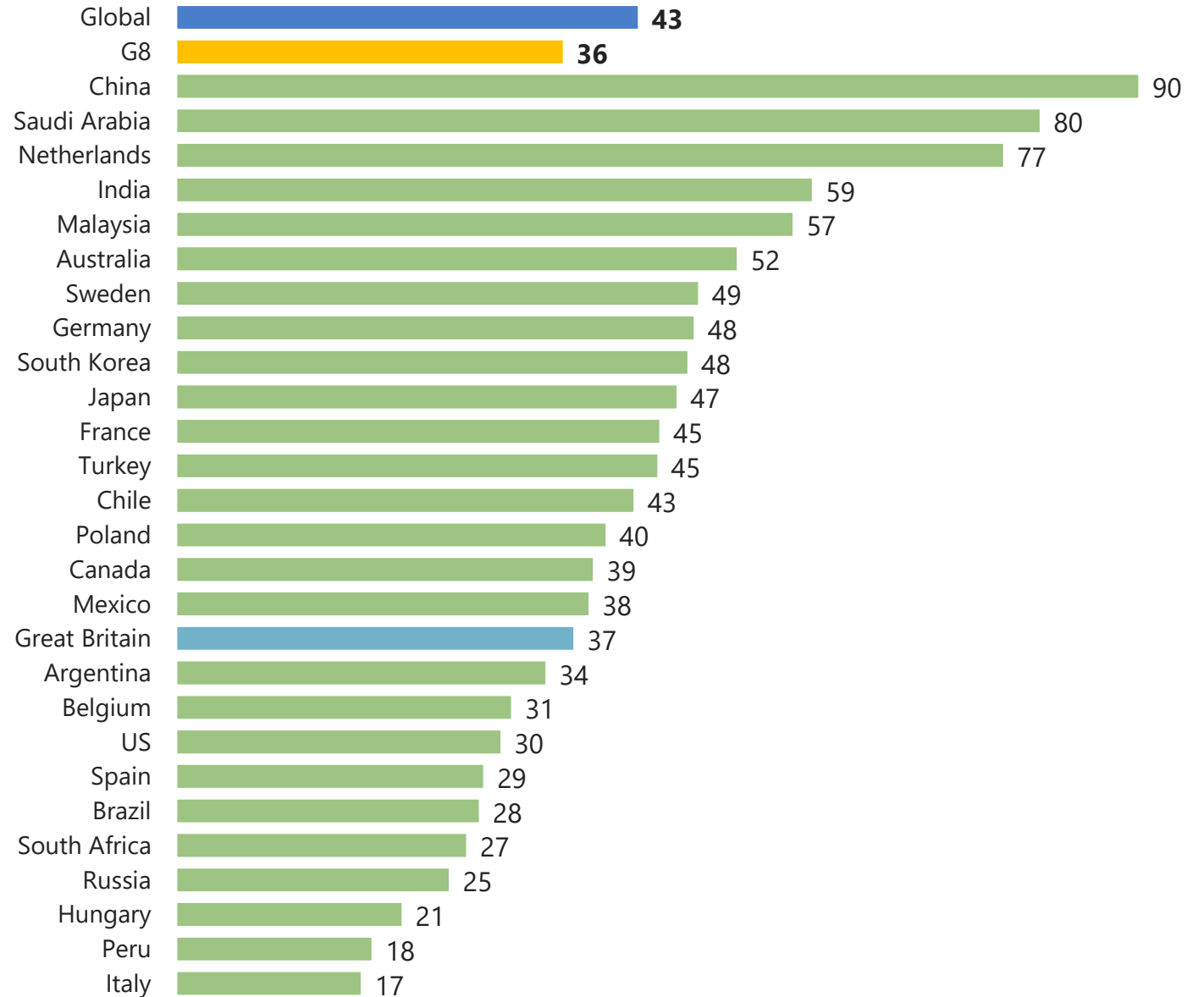
Overall ratings

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

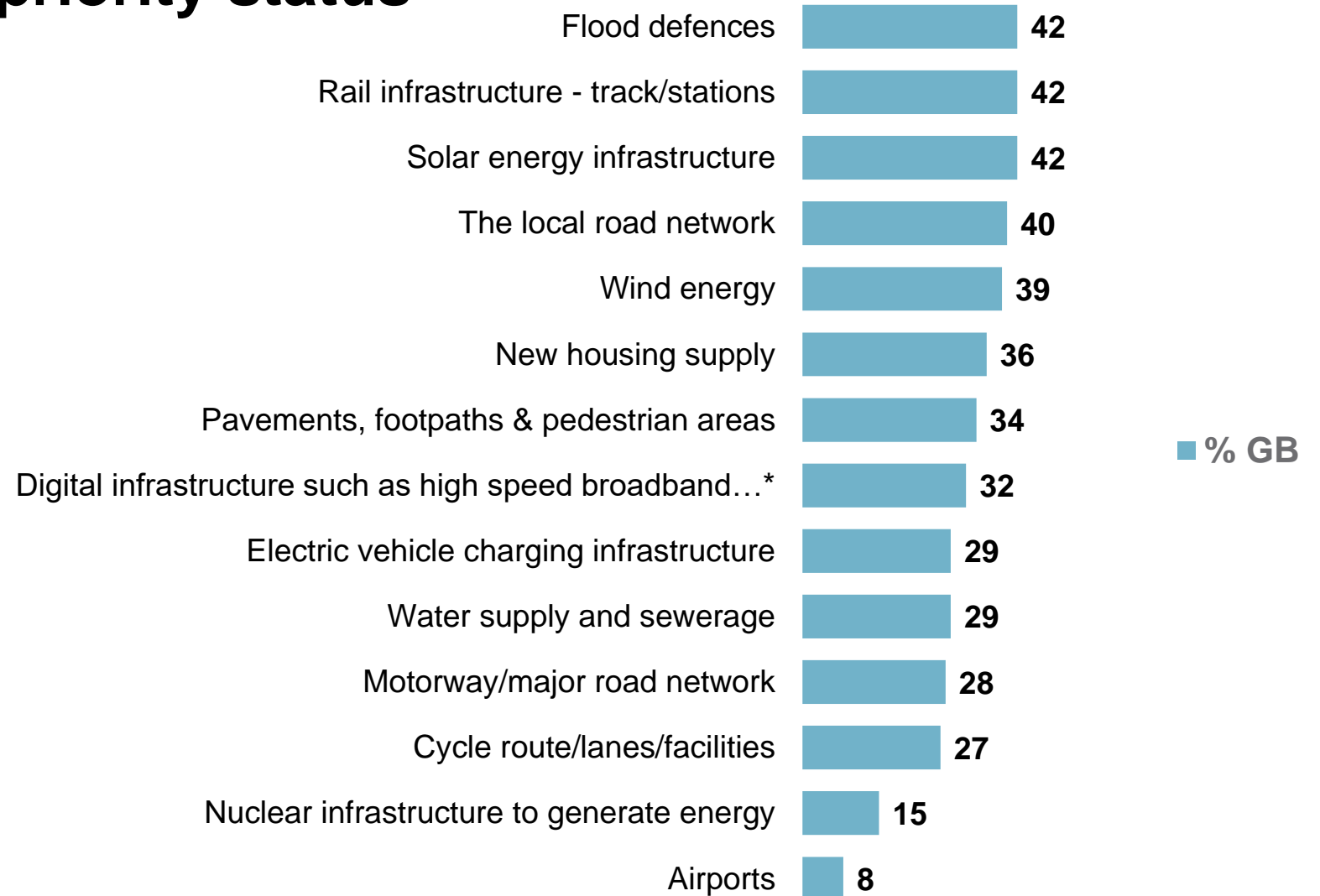


Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Competition for top priority status

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

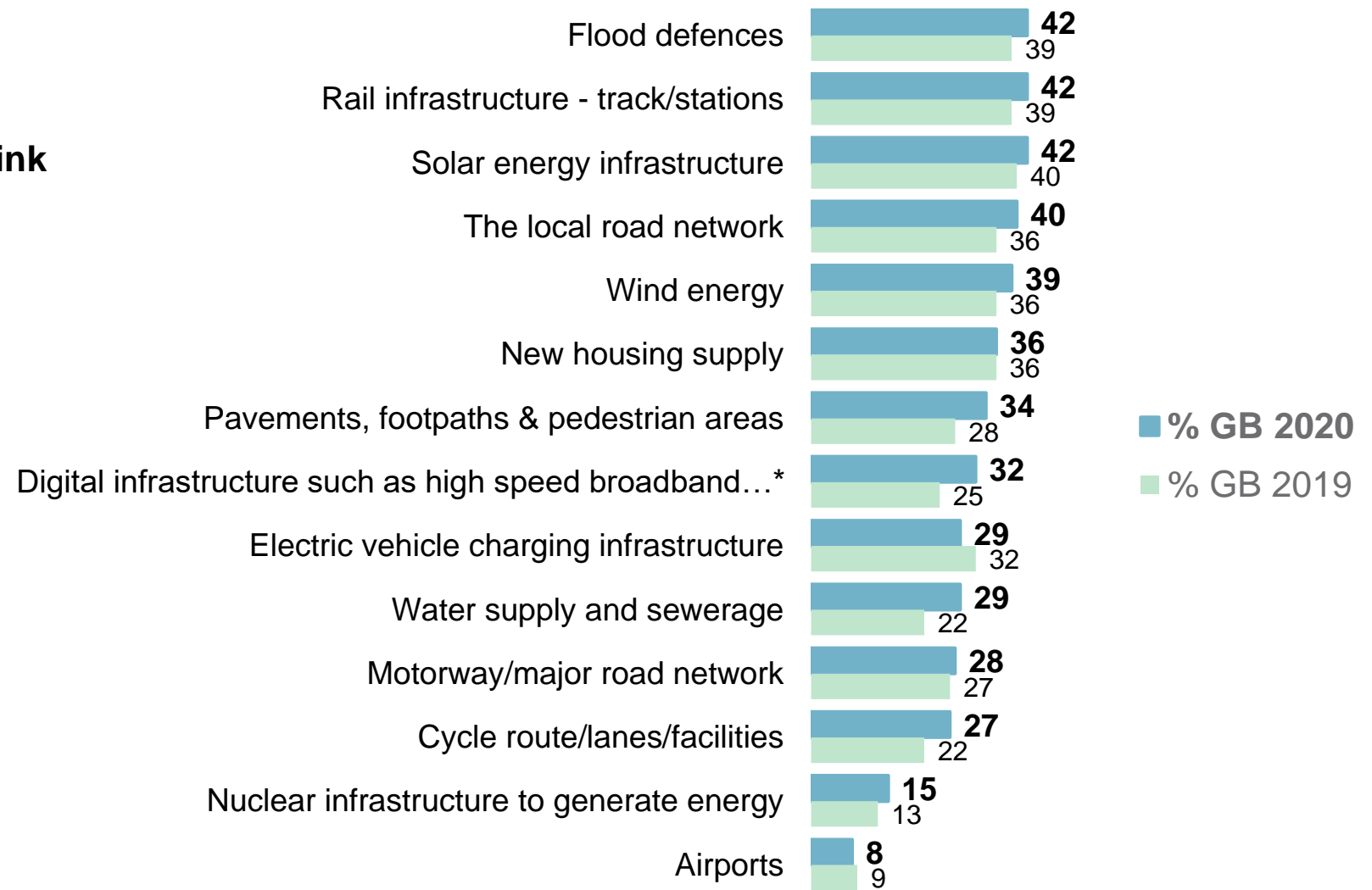


Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Active travel infrastructure, digital and water have become more salient

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



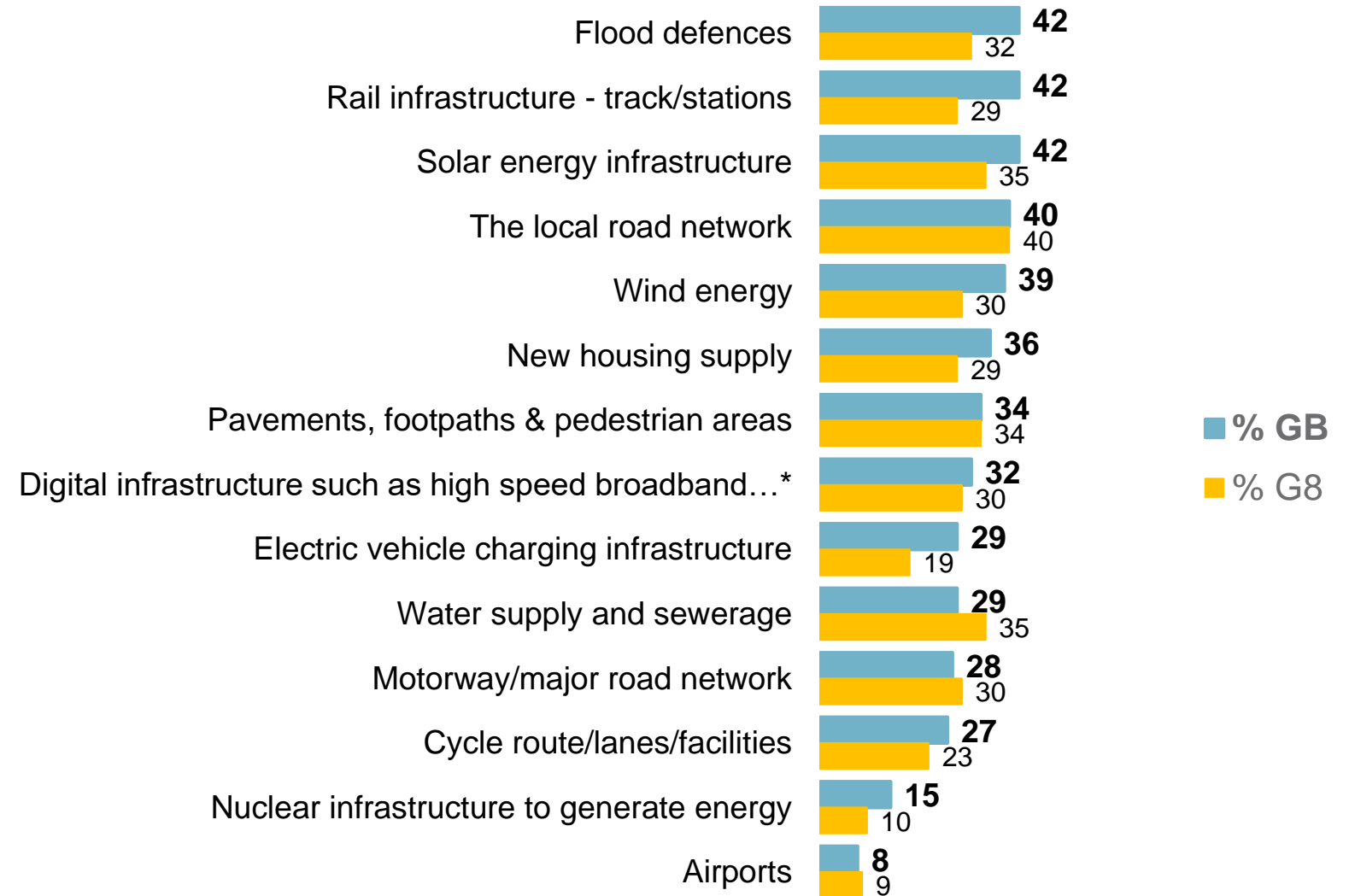
Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020



Flood defences and rail infrastructure particularly salient relative to G8

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

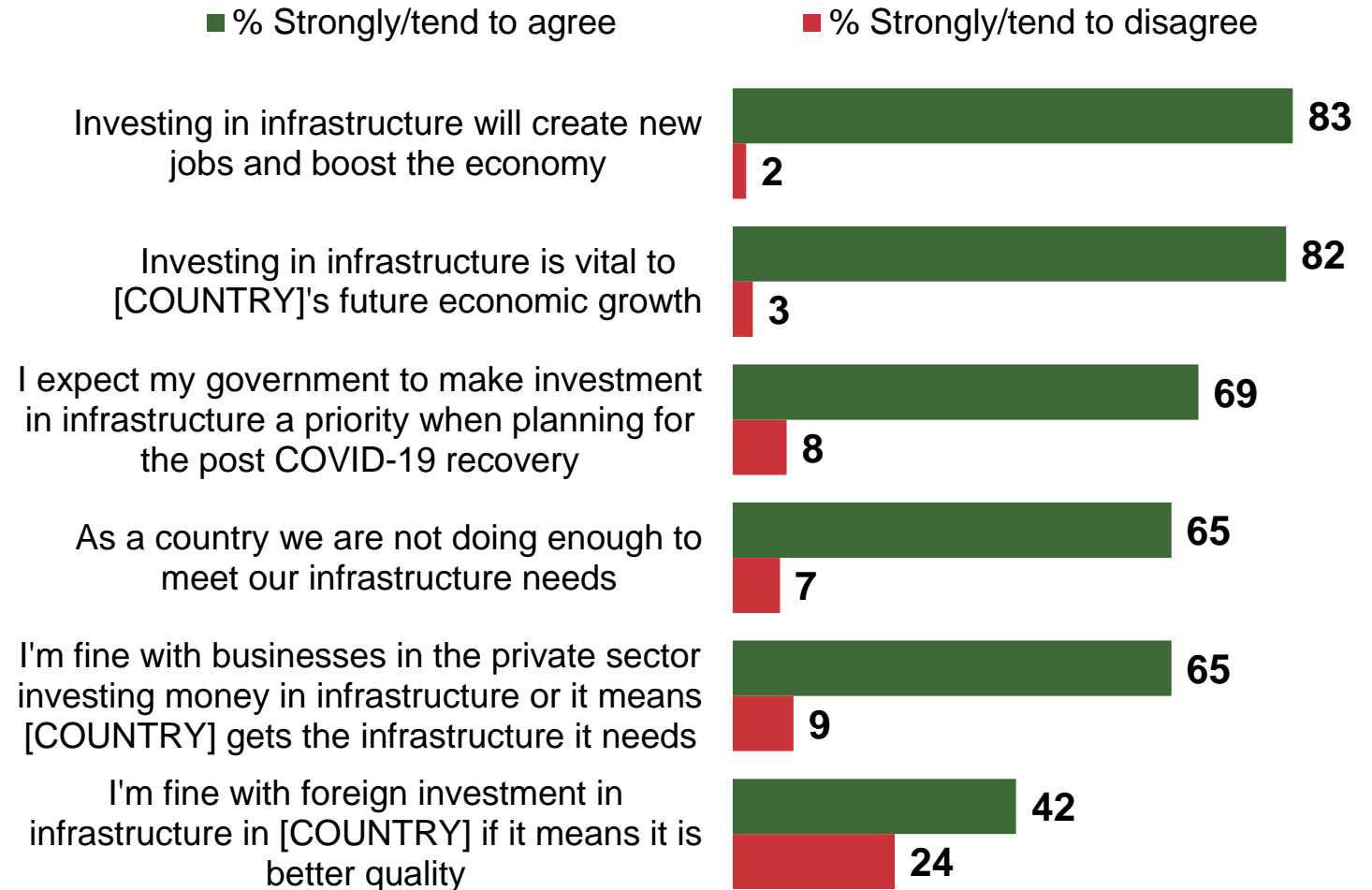


Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

In Britain: investment in infrastructure is seen in a positive light

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree?



Ranked by % strongly/tend to agree

Source: Ipsos/GIIA

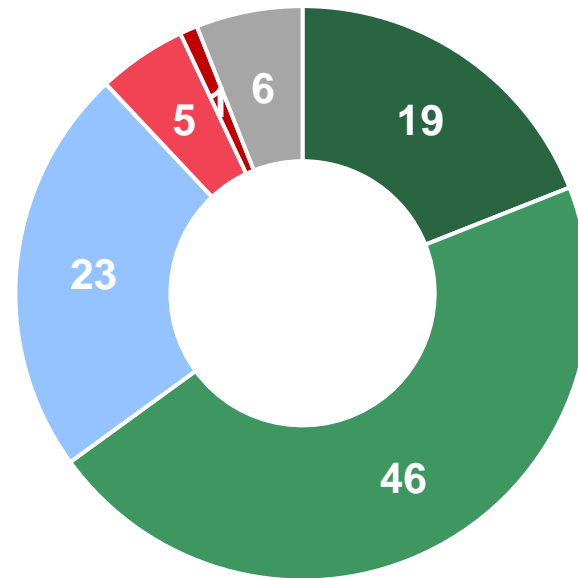
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Continued sense that Britain not doing enough

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – 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



2020:

Agree	Disagree
65%	7%

2019:

Agree	Disagree
66%	6%

2018:

Agree	Disagree
58%	7%

2017:

Agree	Disagree
59%	9%

2016:

Agree	Disagree
60%	8%

Source: Ipsos/GIIA

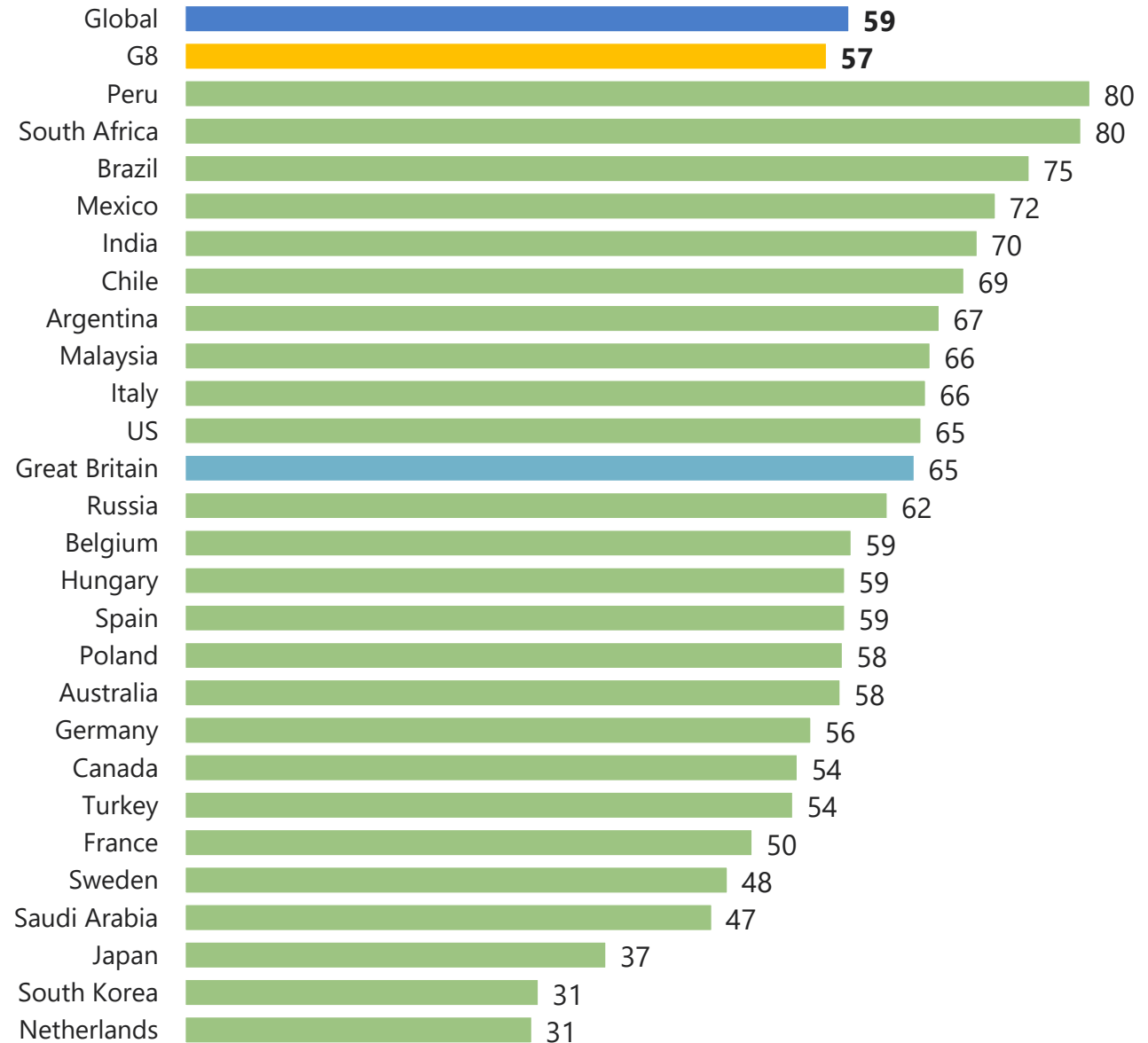
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Mid-table ranking

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – 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/GIIA

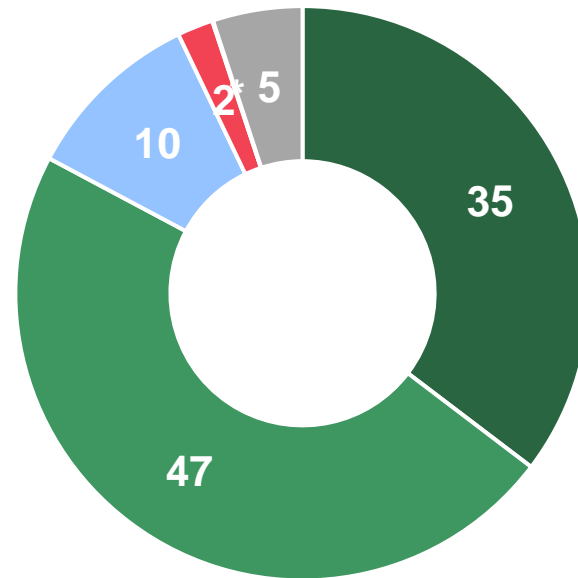
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Investment seen as vital (as it always has)

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – 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



2020:

Agree	Disagree
82%	3%

2019:

Agree	Disagree
80%	2%

2018:

Agree	Disagree
73%	3%

2017:

Agree	Disagree
74%	4%

2016:

Agree	Disagree
76%	2%

Source: Ipsos/GIIA

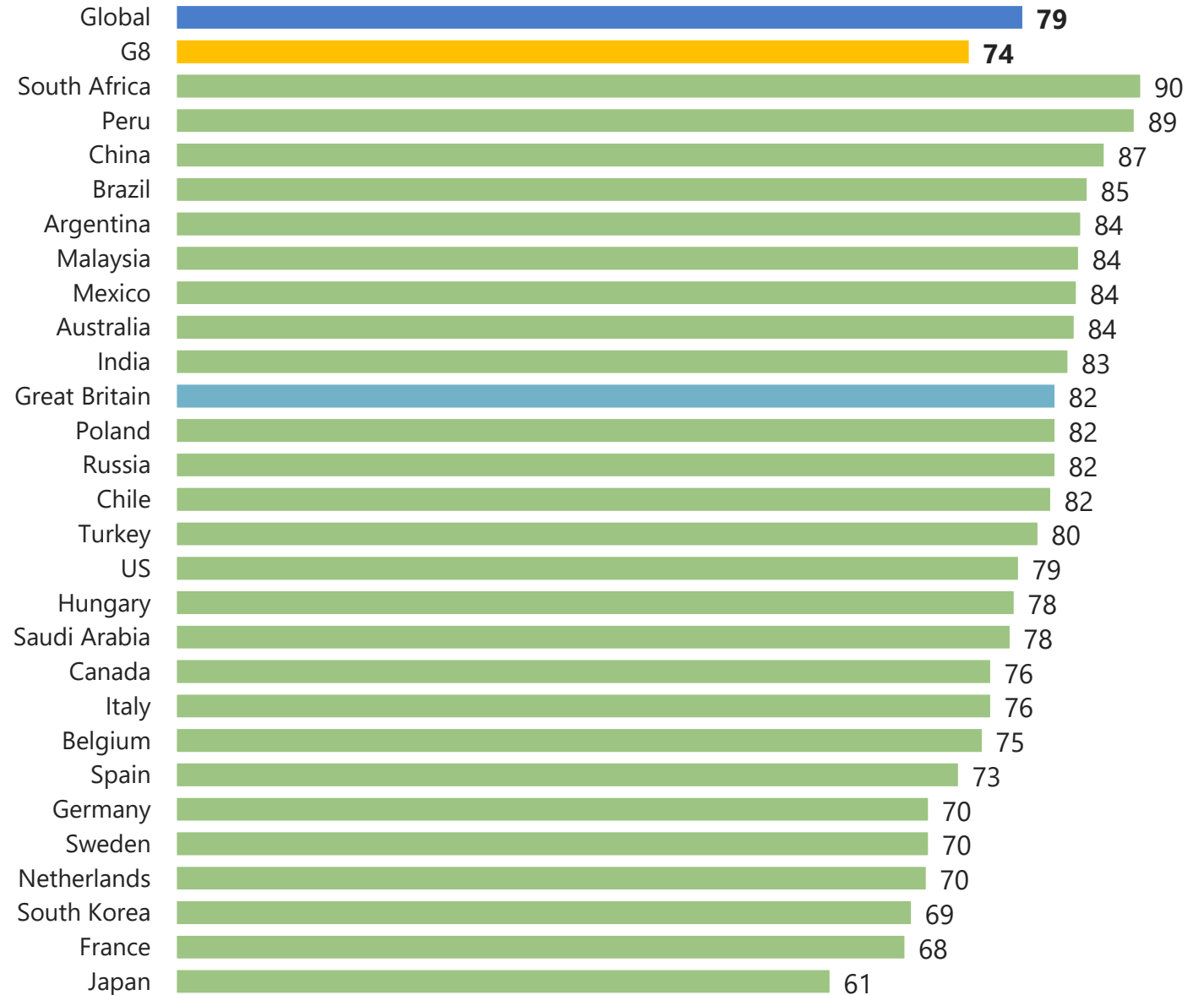
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Most countries agree

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – 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/GIIA

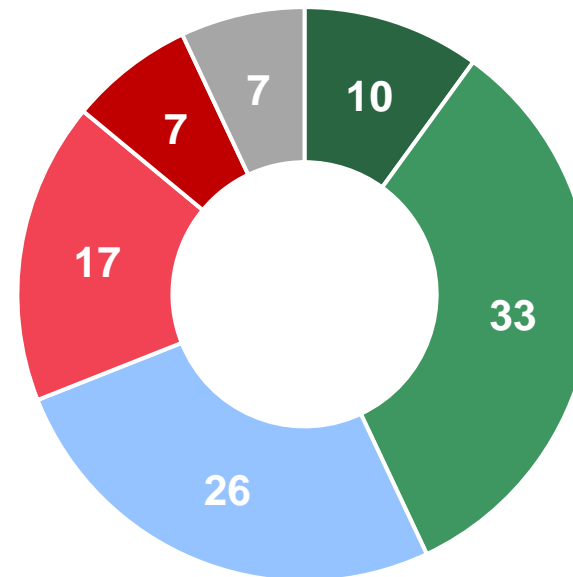
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

More positive than negative towards foreign investment but many unsure

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – 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.

2020:

Agree	Disagree
42%	24%

2019:

Agree	Disagree
48%	20%

2018:

Agree	Disagree
42%	17%

2016:

Agree	Disagree
42%	20%

Source: Ipsos/GIIA

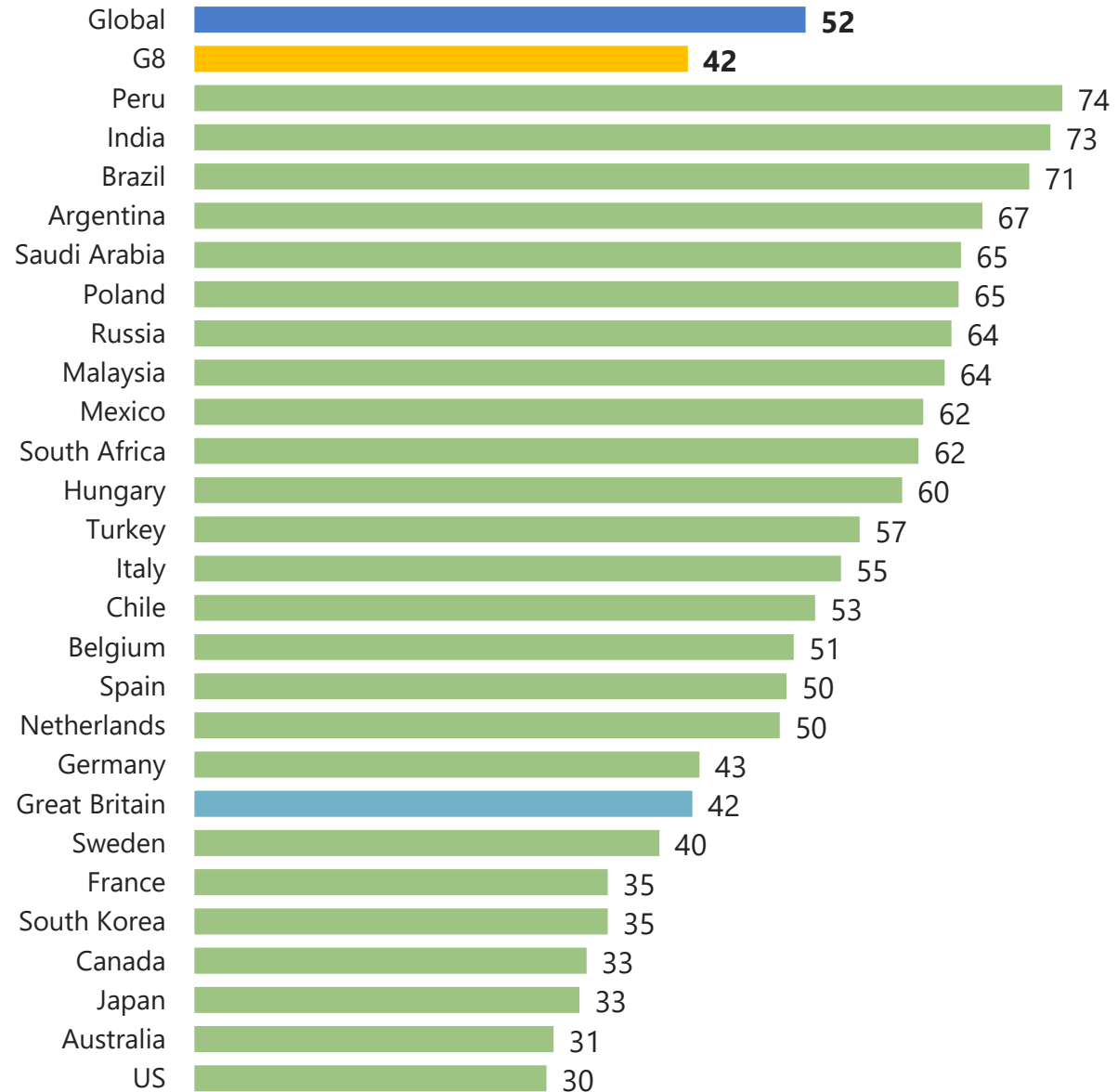
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Other G8 countries are also cooler

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – 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/tend to agree



Source: Ipsos/GIIA

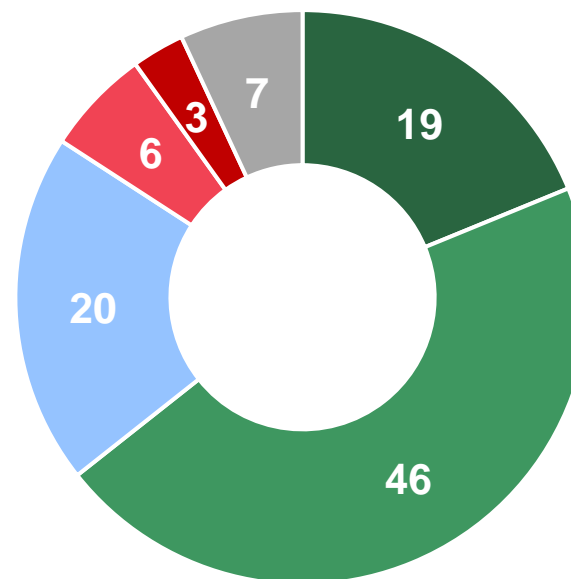
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Britons are warmer towards private sector investment vs 2019

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

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

- % 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.

2020:

Agree	Disagree
65%	9%

2019:

Agree	Disagree
58%	13%

Source: Ipsos/GIIA

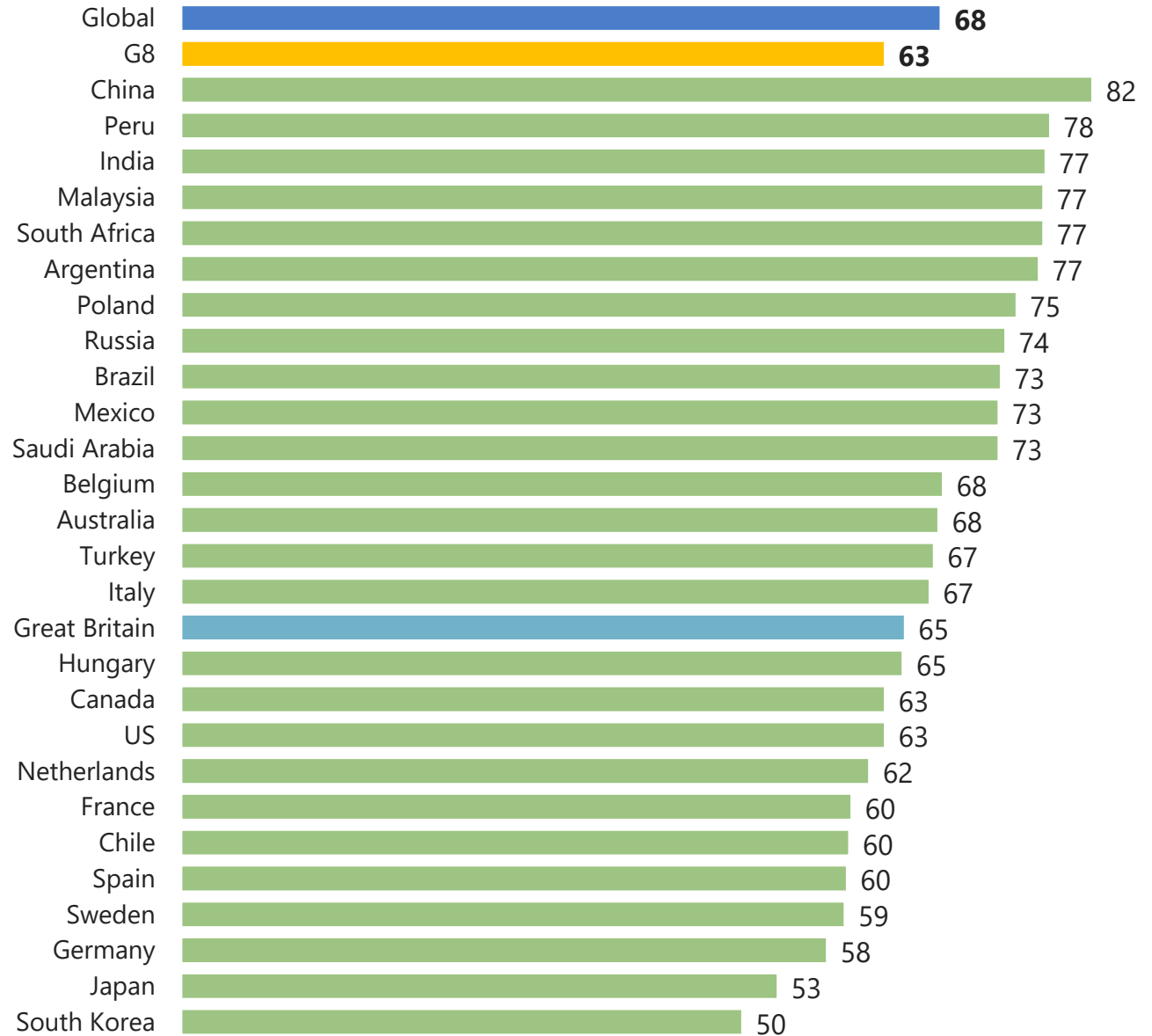
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Similar to G8 average

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

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

% strongly/tend to agree



Source: Ipsos/GIIA

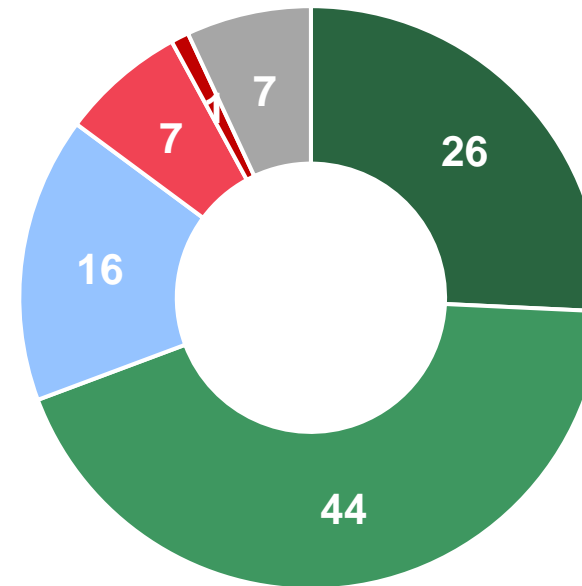
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Investment recognised as important to COVID-19 recovery

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

I expect my government to make investment in infrastructure a priority when planning for the post COVID-19 recovery

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



Source: Ipsos/GIIA

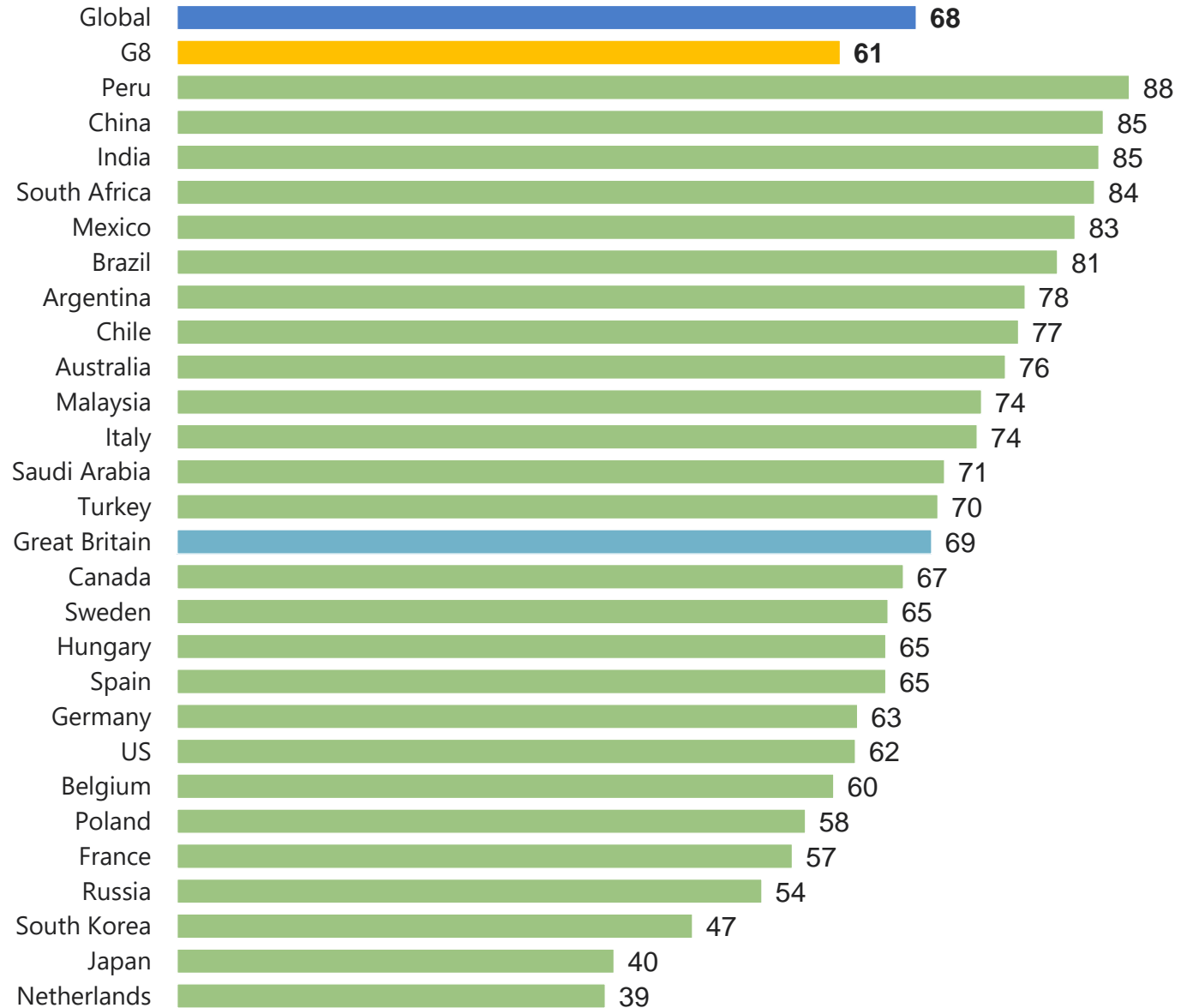
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

More so in Britain than other G8

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

I expect my government to make investment in infrastructure a priority when planning for the post COVID-19 recovery

% strongly/tend to agree



Source: Ipsos/GIIA

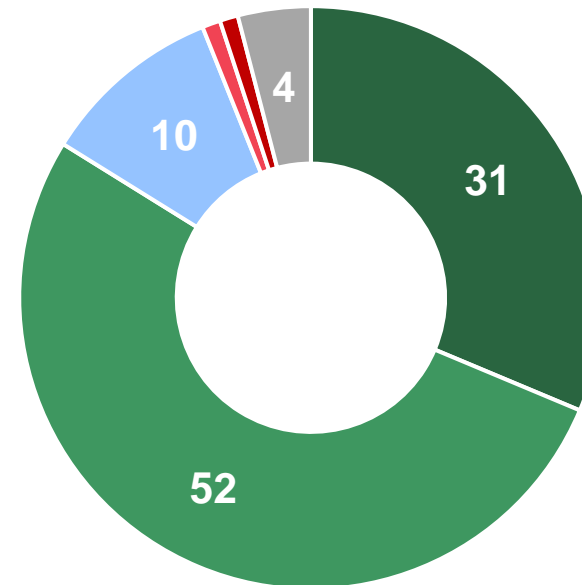
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Investment will create jobs and provide an economic boost

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

Investing in infrastructure will create new jobs and boost the economy

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



Source: Ipsos/GIIA

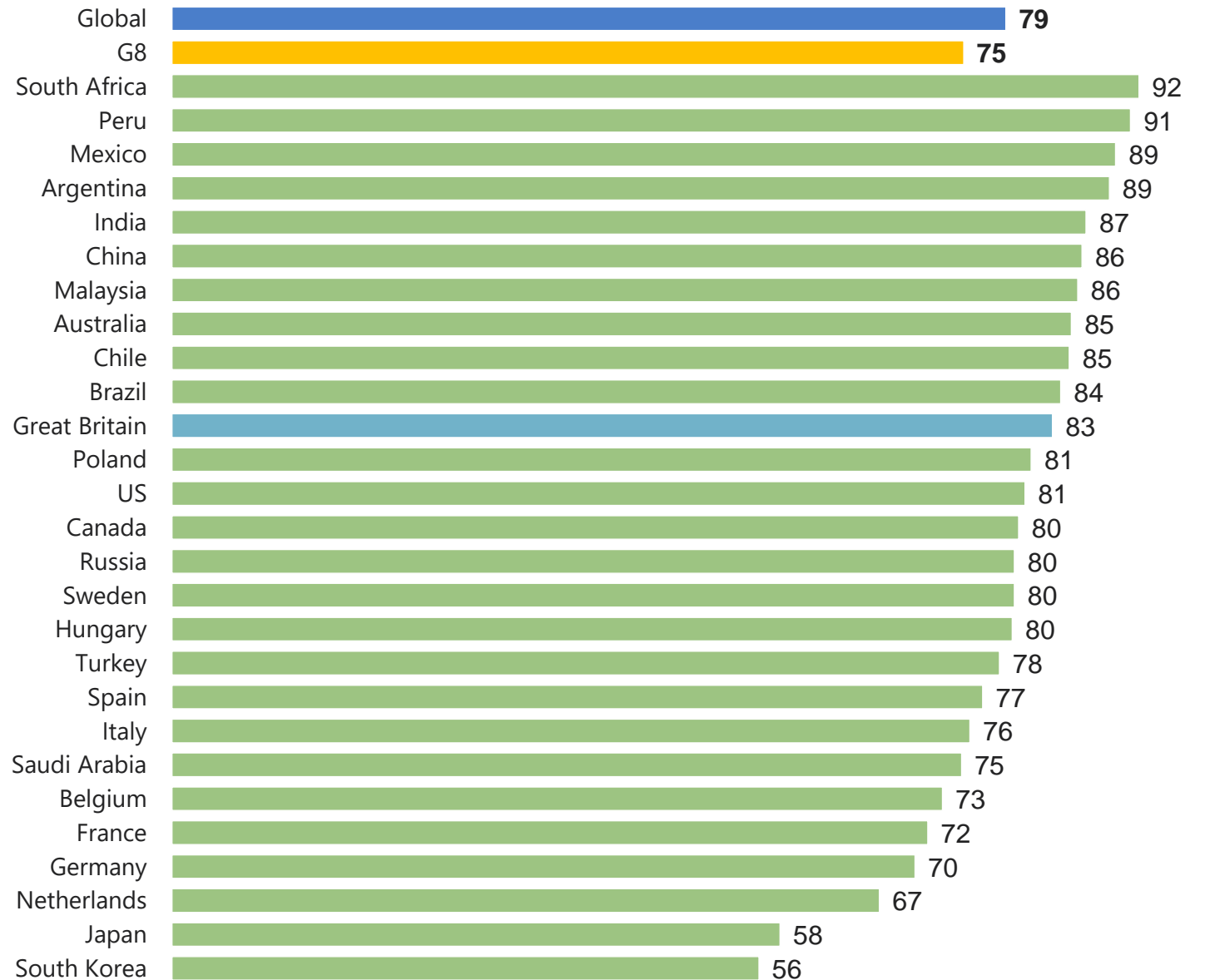
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Britons more positive than average

Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

Investing in infrastructure will create new jobs and boost the economy

% strongly/tend to agree



Source: Ipsos/GIIA

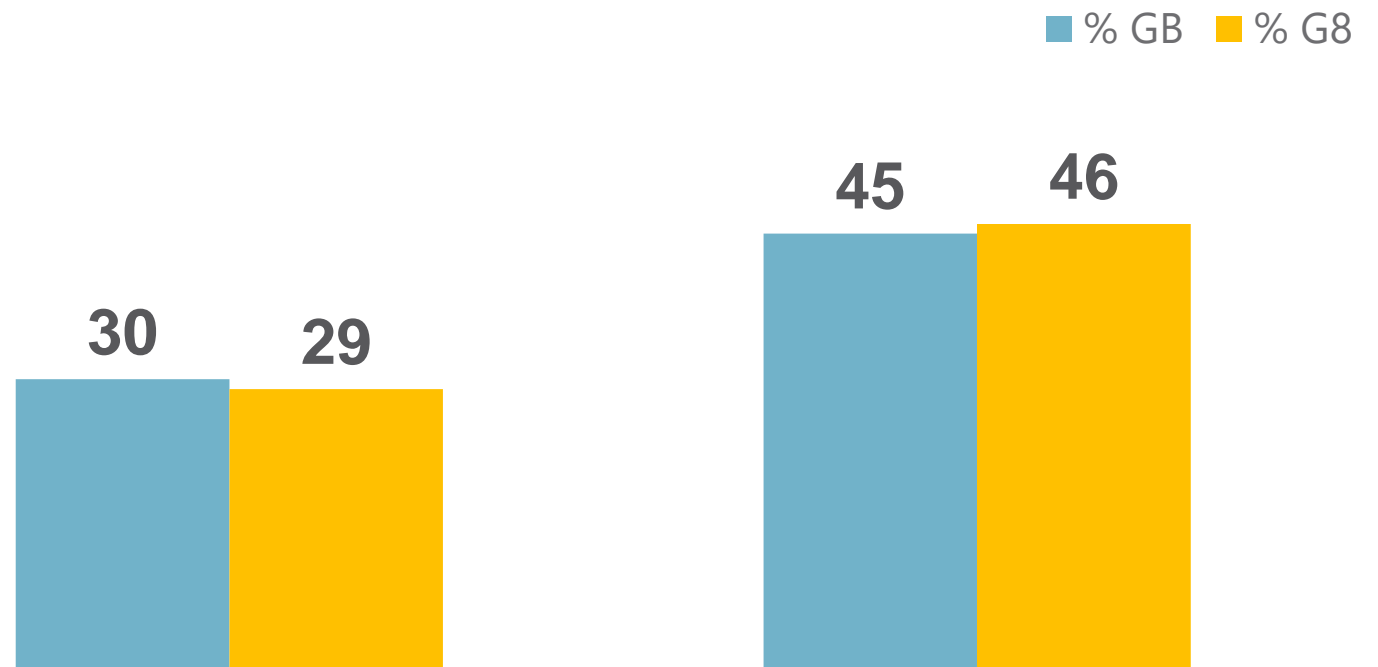
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Plurality preference for social vs economic infrastructure

% STRONGLY/TEND TO PREFER EACH STATEMENT

A: “We should give highest priority to improving [COUNTRY]’s economic infrastructure such as road, rail and air networks, utilities such as energy and water, and broadband and other communications.”

B: “We should give highest priority to improving [COUNTRY]’s social infrastructure such as school and hospital buildings, and housing.”



Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

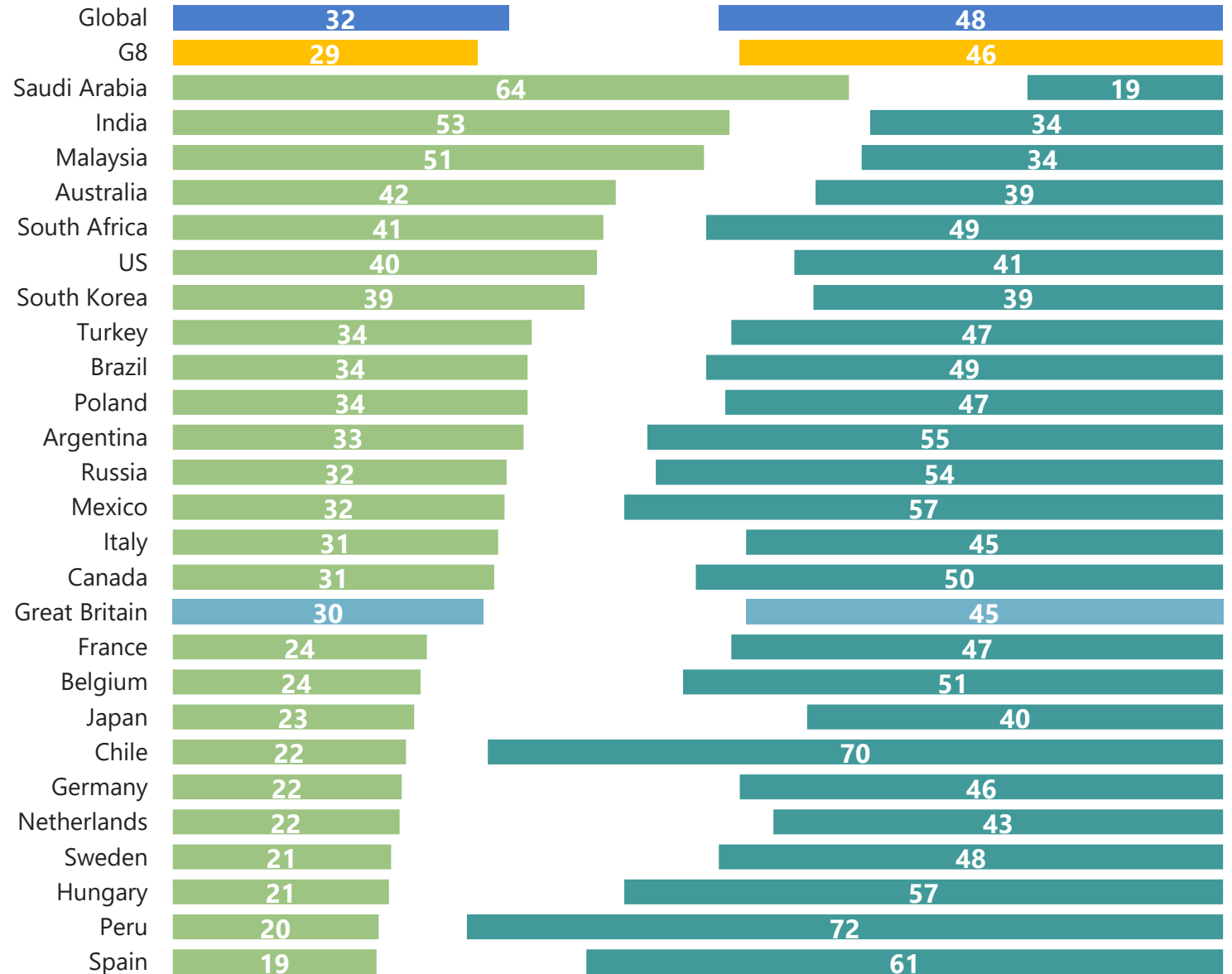
Q. Please read the following pairs of statements, and decide which comes closest to your own opinion. Please choose whether you prefer statement A or B or if you don't prefer one over the other.

A: “We should give highest priority to improving [COUNTRY]’s economic infrastructure such as road, rail and air networks, utilities such as energy and water, and broadband and other communications.”

B: “We should give highest priority to improving [COUNTRY]’s social infrastructure such as school and hospital buildings, and housing.”

% strongly/tend to prefer A

% strongly/tend to prefer B



Source: Ipsos/GIIA

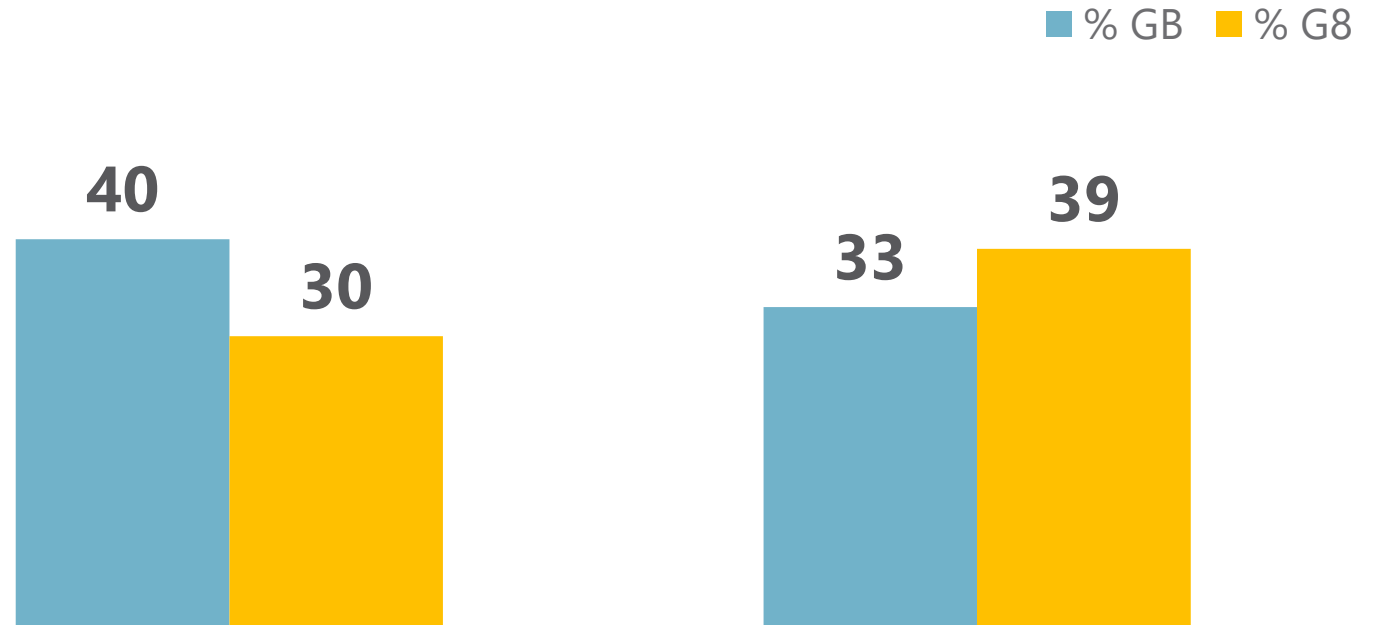
Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

More minded than G8 countries to favour delay to allow engagement

% STRONGLY/TEND TO PREFER EACH STATEMENT

A: “Decisions should be delayed so that the impact of infrastructure projects can be fully understood and the public’s views can be heard properly, even if this means that infrastructure problems are not tackled when they need to be.”

B: “Decisions should not be delayed so that infrastructure problems can be tackled when they need to be, even if this means that the impact of infrastructure projects cannot be fully understood and the public’s views cannot be heard properly.”



Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

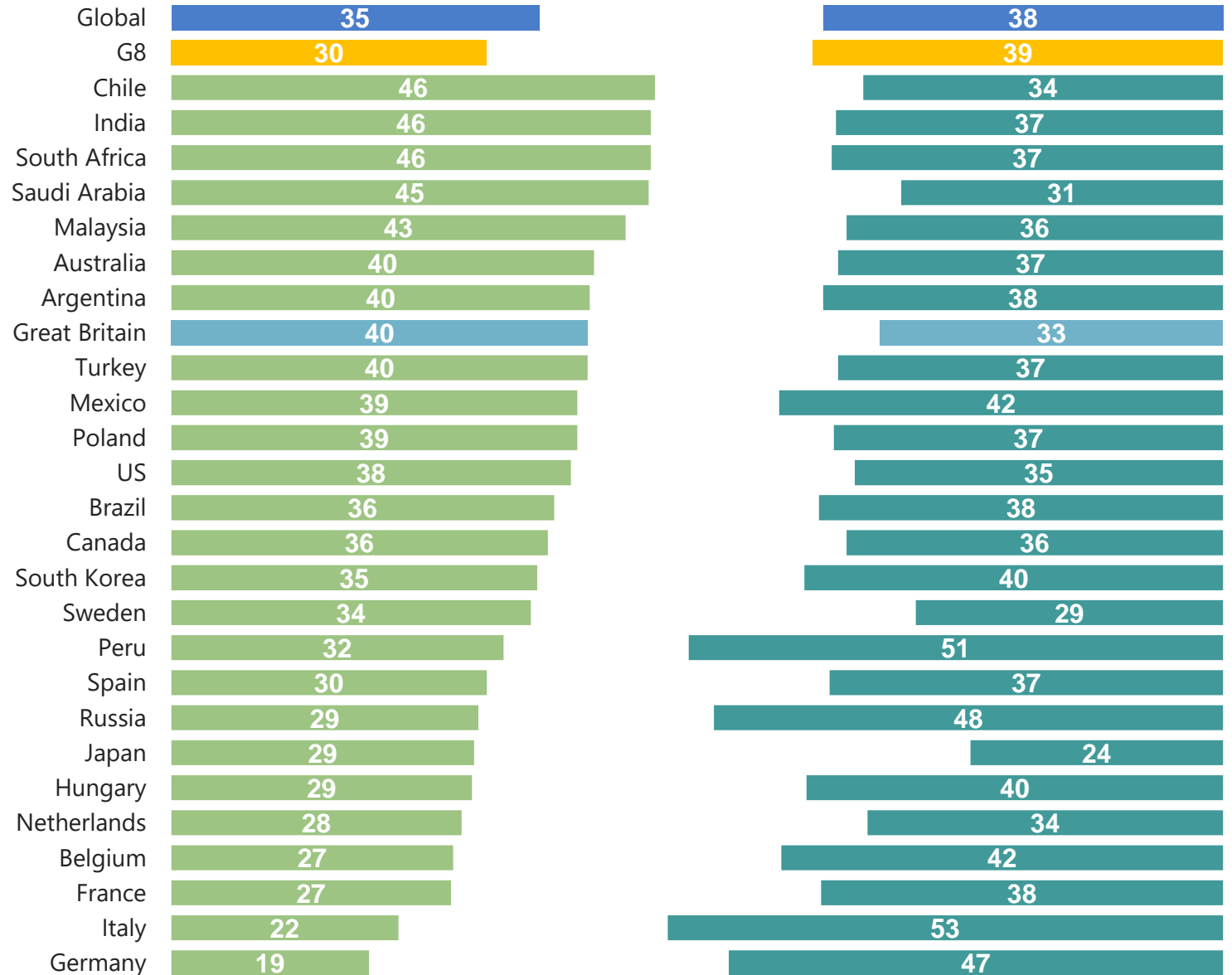
Q. Please read the following pairs of statements, and decide which comes closest to your own opinion. Please choose whether you prefer statement A or B or if you don't prefer one over the other.

A: "Decisions should be delayed so that the impact of infrastructure projects can be fully understood and the public's views can be heard properly, even if this means that infrastructure problems are not tackled when they need to be."

B: "Decisions should not be delayed so that infrastructure problems can be tackled when they need to be, even if this means that the impact of infrastructure projects cannot be fully understood and the public's views cannot be heard properly."

% strongly/tend to prefer A

% strongly/tend to prefer B



Source: Ipsos/GIIA

Base: 1,001 GB adults among 19,516 adults (online), July-August 2020

Methodology

- **2020:** 27 countries, **19,516** participants, **24 July–7 August 2020** (online):
Argentina, Australia*, Belgium, Brazil*, Canada*, Chile, China*, France*, Germany*, **Great Britain (1,002)***, Hungary, India, Italy*, Japan*, Malaysia, Mexico, Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Serbia, Spain*, Sweden, Turkey and the United States of America* ** denotes 1,000+ sample size*
- **2019:** 28 countries, **26 July–9 August 2019:**
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.
- A selection of trends is included. Further information is available:

<https://www.ipsos.com/en/global-infrastructure-index-public-satisfaction-and-priorities-2019> (2019)

<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)

Regions and sample sizes

Europe

8,005

Belgium

France

Germany

Great Britain

Hungary

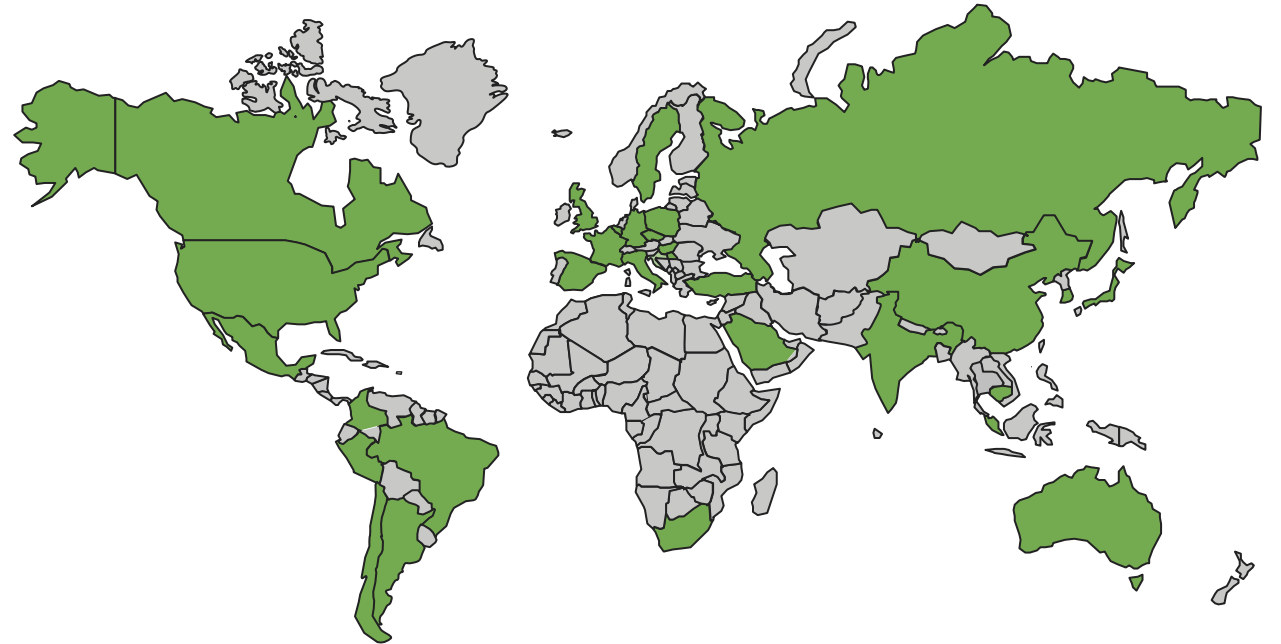
Italy

Netherlands

Poland

Spain

Sweden



N. America

2,002

Canada

U.S.A.

LATAM

3,003

Argentina

Brazil

Chile

Mexico

Peru

APAC

4,507

Australia

India

Japan

Malaysia

South Korea

G8

7,506

Canada

France

Germany

Great Britain

Italy

Japan

Russia

U.S.A.

BRIC

3,001

Brazil

Russia

India

China

ME Africa

1,499

Saudi Arabia

South Africa

Turkey

Further information

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