

# INFRASTRUCTURE IN NEW ZEALAND 2023

**An Ipsos Global Advisor Study**  
September 2023

In partnership with:



**GAME CHANGERS**



# HEADLINES



# KEY INSIGHTS FOR NEW ZEALAND

- Less than a third of New Zealanders (29%) say they are satisfied with our National infrastructure.
- Not only is this significantly lower than the global country average of 38%, but is a **significant decrease** from the 2019 result (46%).
- More than half of New Zealanders (61%) believe that not enough is being done to meet our infrastructure needs.
- Flood defences and new housing supply have the lowest ratings of infrastructure quality in New Zealand – with both being identified as key priorities for investment.
- Extreme weather events appear to have put a spotlight on flood defences for New Zealanders, as its perceived quality has significantly decreased since 2019 and is significantly lower than the global country average.
- There are also lower ratings across the board for the quality of most infrastructure types compared to 2019, including water, roads, rail and airports.
- New Zealanders' ratings of the quality of our renewable energy infrastructure and electric vehicle charging infrastructure are higher than the global country average.
- Similarly to the global country average, increased public spending to improve infrastructure is only preferred by a minority – the majority agree that there is already too much public spending.
- However, New Zealanders have a more long-term outlook than the global country average. We are more likely to agree that we should give higher priority to improving infrastructure in the long-term than minimising the cost to consumers and taxpayers in the short-term.

This year's survey was conducted in 31 countries (during May-June 2023) and came after a gap of nearly 2 years in the Global Infrastructure Index series, and almost 3 years since a New Zealand report was last published in Nov 2019. The 2023 New Zealand sample size was n = 1,004



# METHODOLOGY

**2023: 31 countries, 22,816 participants, 26 May–9 June 2023**

(online): Argentina, Australia\*, Belgium, Brazil\*, Canada\*, Chile, Colombia, France\*, Germany\*, Great Britain\*, Hungary, India\*, Indonesia, Ireland, Italy\*, Japan\*, Malaysia, Mexico, Netherlands, New Zealand\*, Peru, Poland, Romania, Singapore, South Africa, South Korea, Spain\*, Sweden, Thailand, Turkey and the U.S.A.\*

*\* denotes 1,000+ sample size*

**2021: 28 countries, 19,514 participants, 23 July–6 August 2021**

(online): Argentina, Australia\*, Belgium, Brazil\*, Canada\*, Chile, China\*, Colombia, France\*, Germany\*, Great Britain\*, Hungary, India, Italy\*, Japan\*, Malaysia, Mexico, Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain\*, Sweden, Turkey and the U.S.A.\*

*\* denotes 1,000+ sample size*

The “**Global Country Average**” reflects the average result for all the countries in the study. It has not been adjusted to the population size of each country and is not intended to suggest a total result. Please note: the 2016-2023 surveys used the same methodology, but **the profile of participating countries has changed**. This means that the global country average/trend does not always involve an exact like-for-like comparison. Similarly, Russia was excluded from fieldwork meaning that G8 in previous years is G7 this year.

The samples in some countries can be taken as representative of these countries’ general adult population under the age of 75. In others, they are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more “connected” segment of these populations. ( A full list of countries can be supplied on request).

Weighting has been employed to balance demographics and ensure that the sample’s composition reflects that of the adult population according to the most recent census data.

The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. More information on the Ipsos use of credibility intervals is available in request.

Where results do not sum to 100 or the ‘difference’ appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of don't knows or not stated responses

# **SATISFACTION & ATTITUDES**

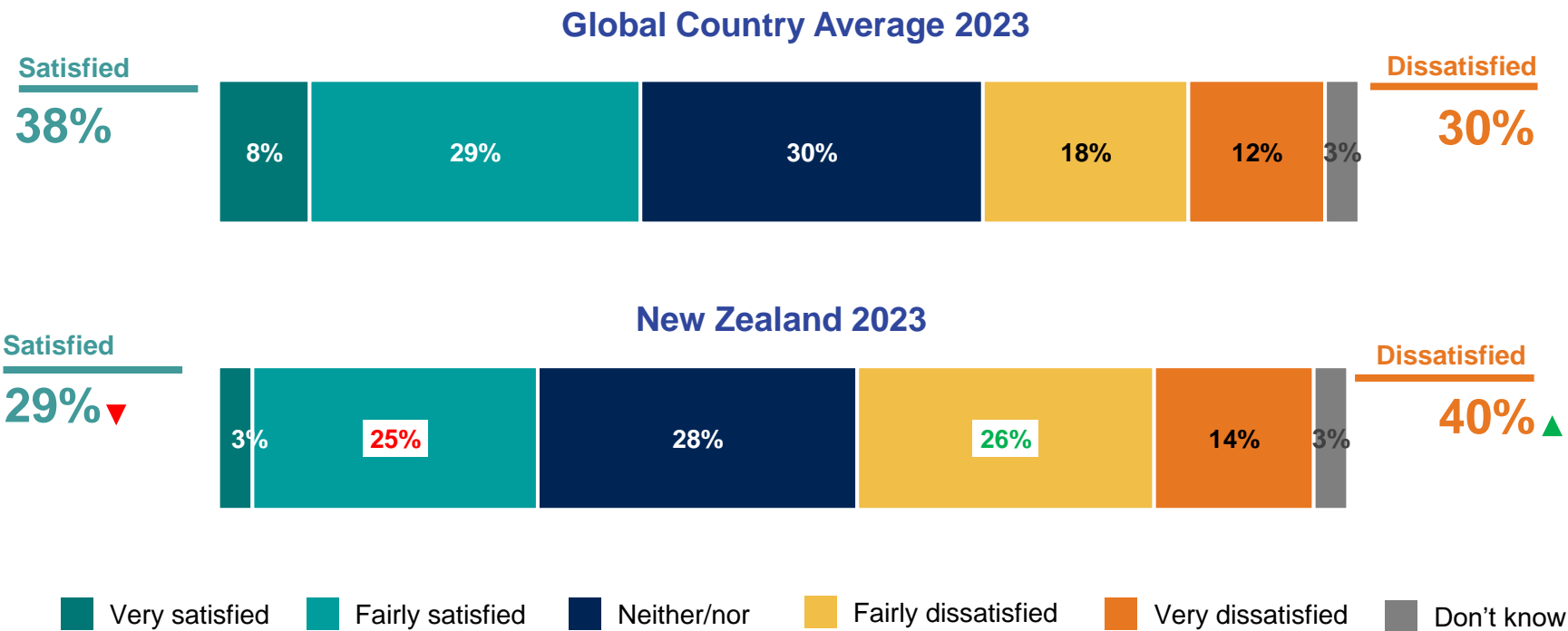




# NEW ZEALANDERS ARE LESS SATISFIED WITH INFRASTRUCTURE COMPARED TO THE GLOBAL AVERAGE

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?**



Green / red indicates significantly higher / lower score vs. Global results

Source: Ipsos/GIIA

Base: Global - 22,816 adults (online), 31 countries, May-June 2023; New Zealand (n=1,004)

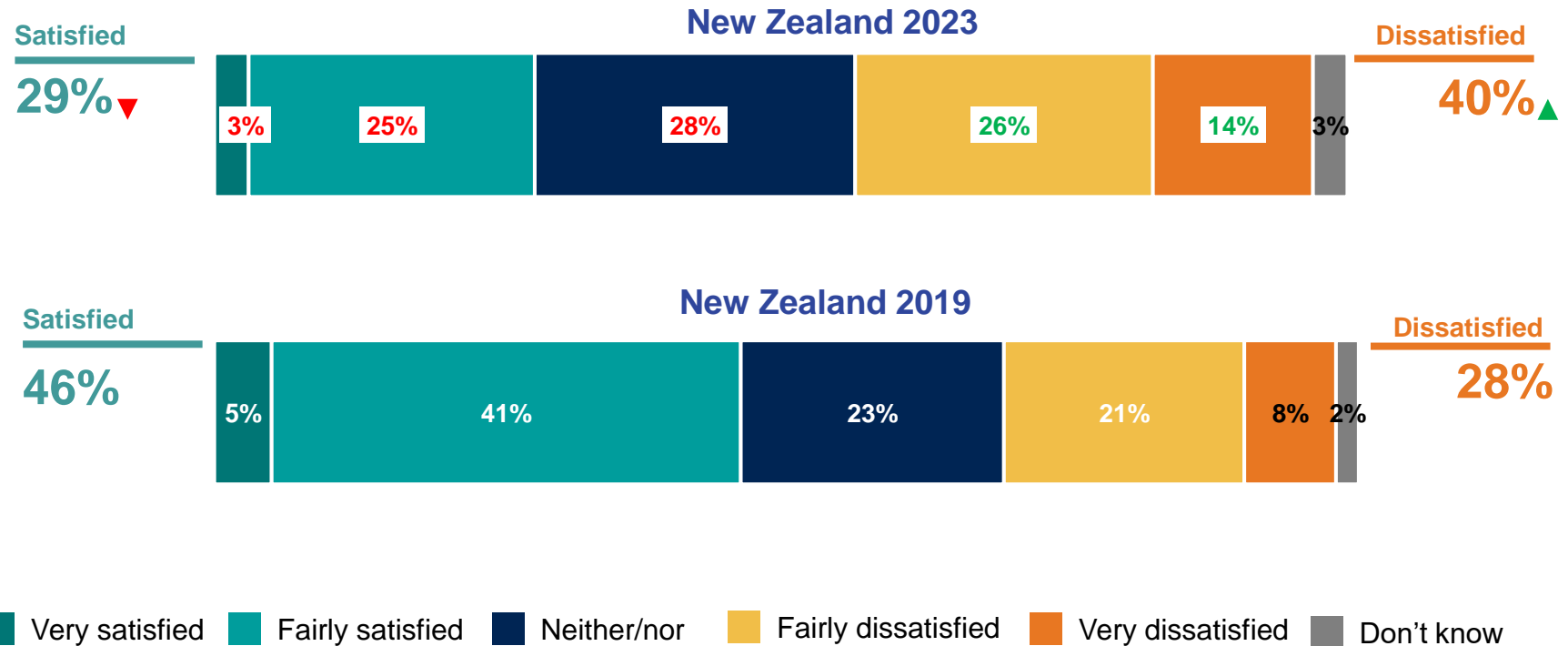


# NEW ZEALANDERS' SATISFACTION WITH INFRASTRUCTURE HAS ALSO DROPPED BY -17 PERCENTAGE POINTS SINCE 2019



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?**



Source: Ipsos/GIIA  
 Base: Global - 22,816 adults (online), 31 countries, May-June 2023; New Zealand (n=1,004)

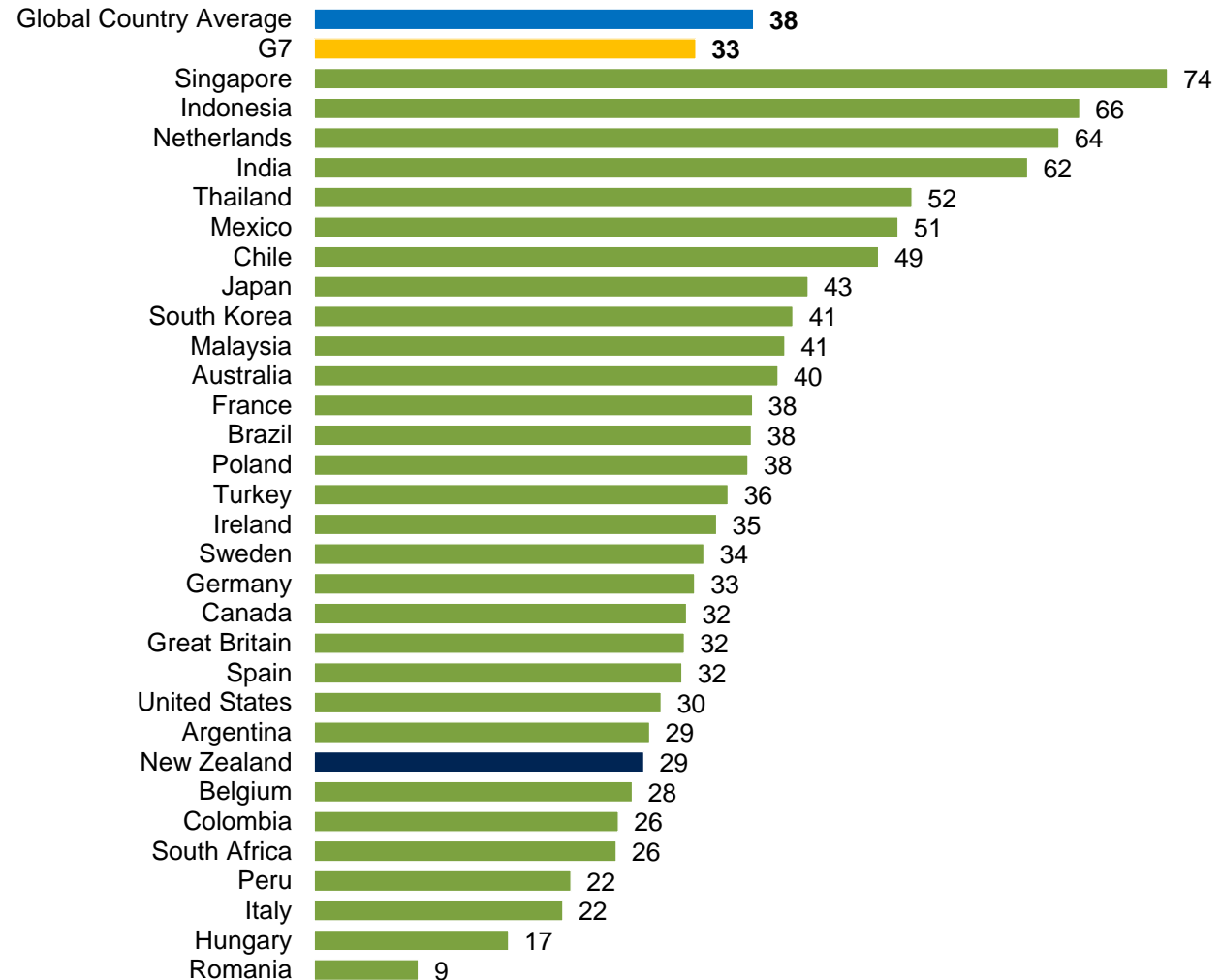


# THERE IS CONSIDERABLE VARIATION IN SATISFACTION ACROSS THE 31 COUNTRIES AND NEW ZEALAND SITS NEAR THE BOTTOM

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: 22,816 adults (online), 31 countries, May-June 2023

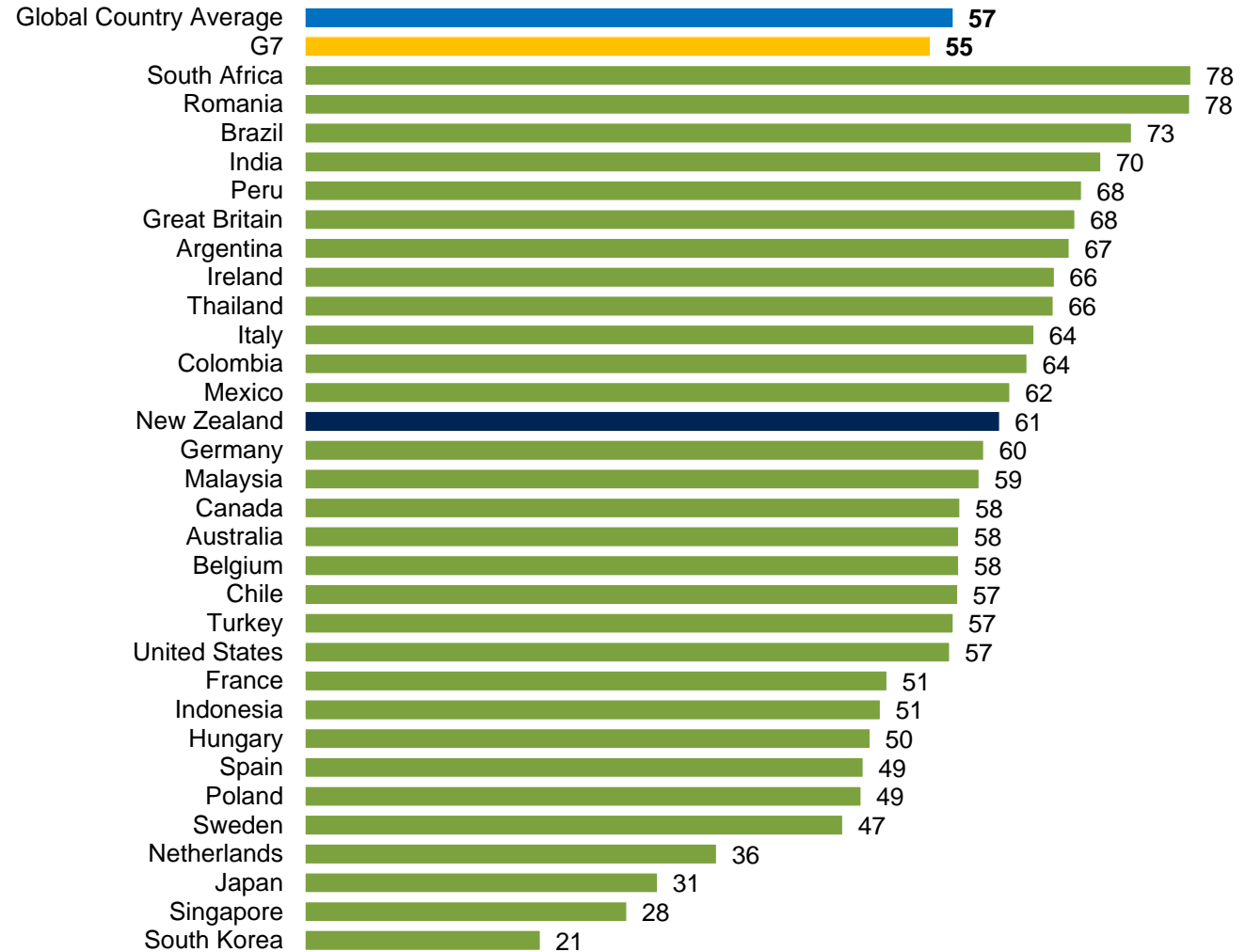


# A MAJORITY AGREE THAT NEW ZEALAND IS NOT DOING ENOUGH TO MEET ITS INFRASTRUCTURE NEEDS

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”**

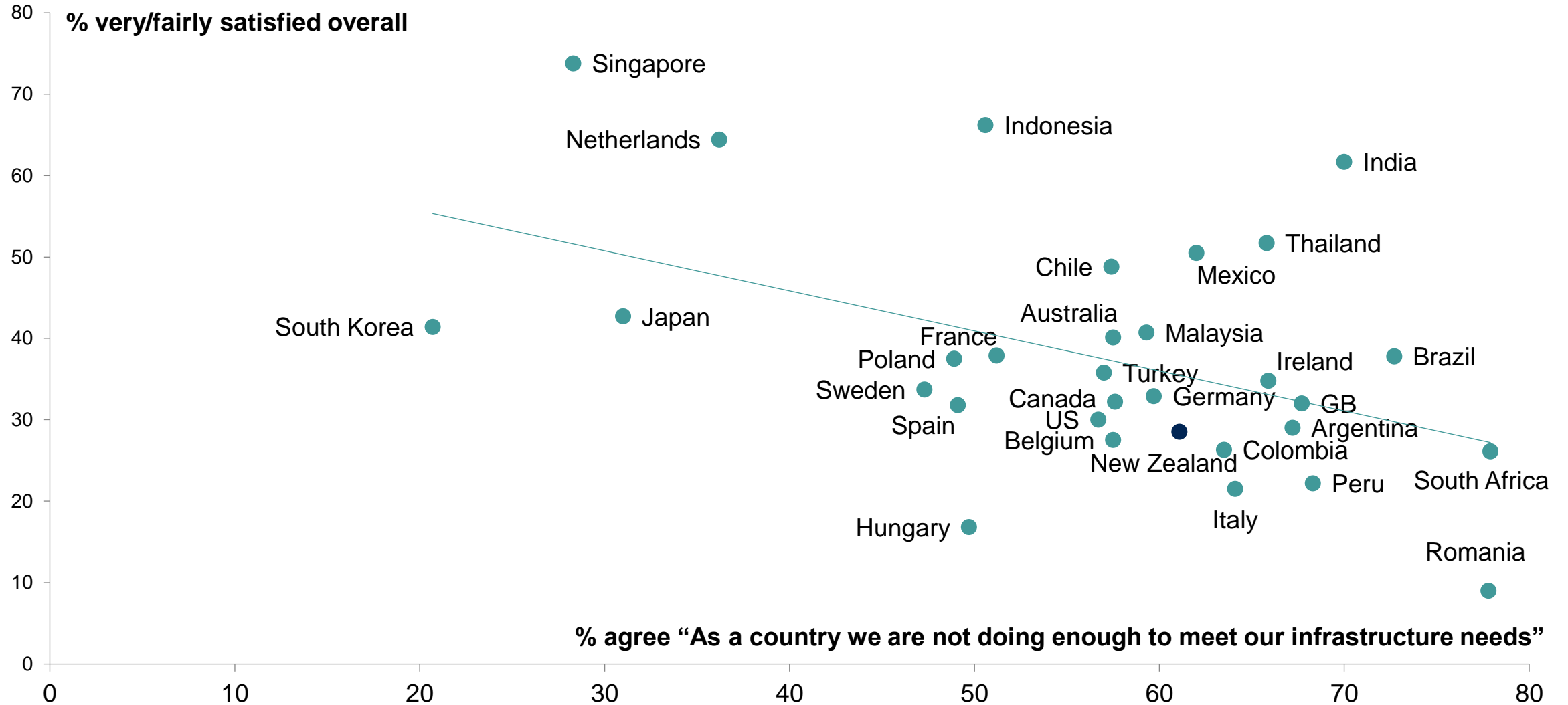
**% strongly/tend to agree**



Source: Ipsos/GIIA

Base: 22,816 adults (online), 31 countries, May-June 2023

# LOWER SATISFACTION WITH INFRASTRUCTURE TENDS TO DRIVE A SENSE THAT NOT ENOUGH IS BEING DONE



Source: Ipsos/GIIA

Base: 22,816 adults (online), 31 countries, May-June 2023

Correlation = -0.46

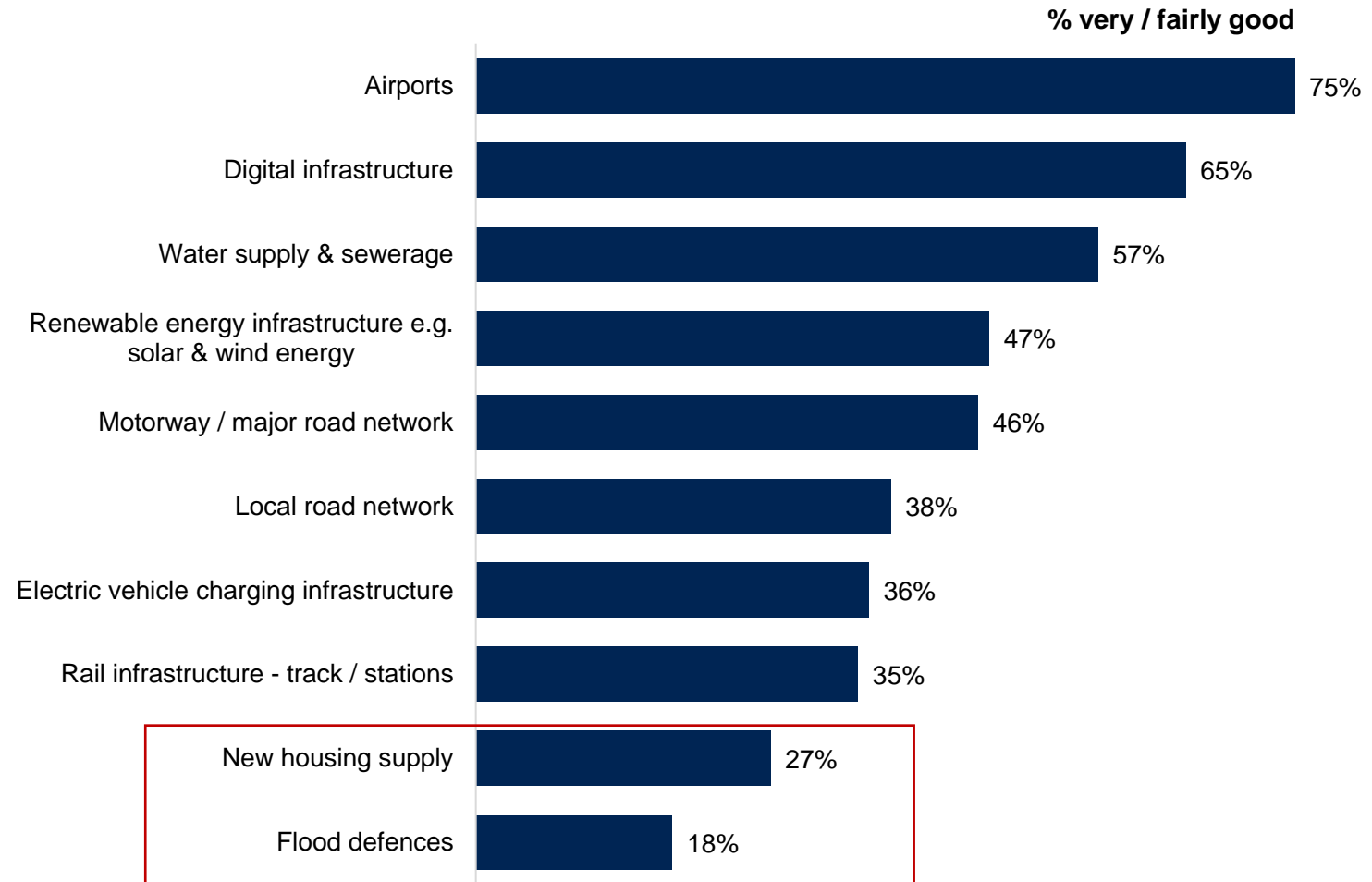
# SECTORS



# RATINGS OF INFRASTRUCTURE QUALITY IN NZ



New Zealanders are least satisfied with the new housing supply and flood defences



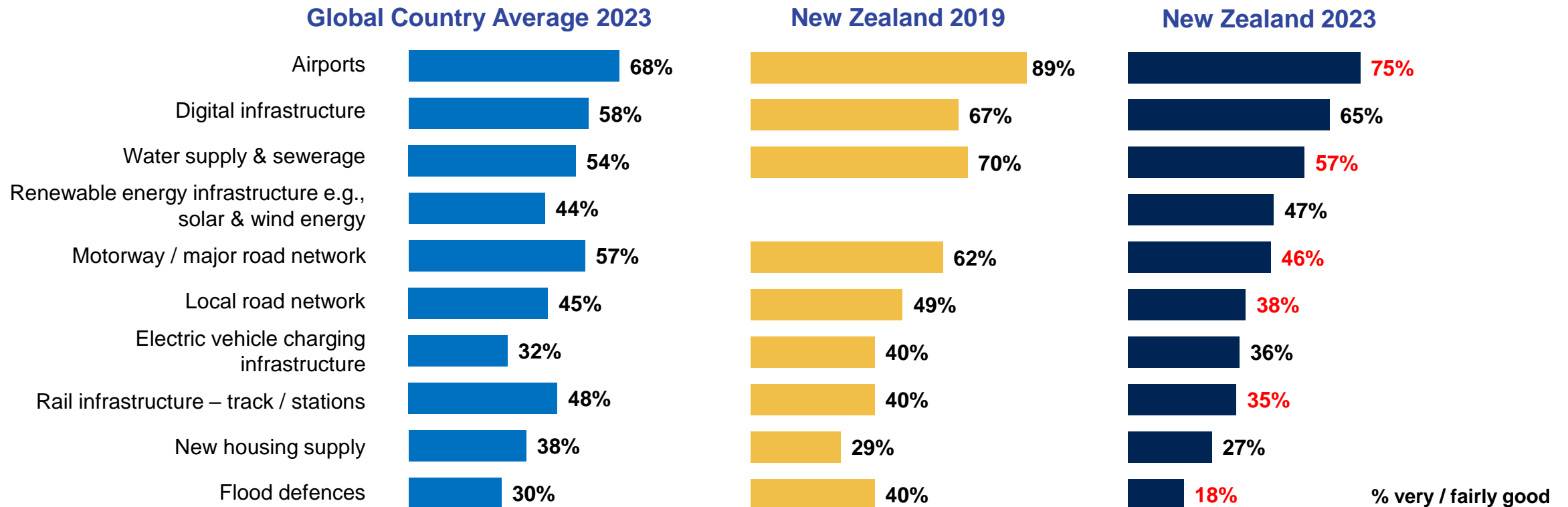
Source: Ipsos/GIIA

Q. These next questions are about different types of infrastructure in New Zealand. Please indicate how you would rate the current quality of each one in New Zealand.

Base: New Zealand – May-Jun '23 (n=1,004)

# VIEWS OF INFRASTRUCTURE QUALITY

The perceived quality of many types of infrastructure in New Zealand has decreased significantly compared to 2019, but our ratings of the quality of renewable energy infrastructure and electric vehicle charging infrastructure are higher than the global country average



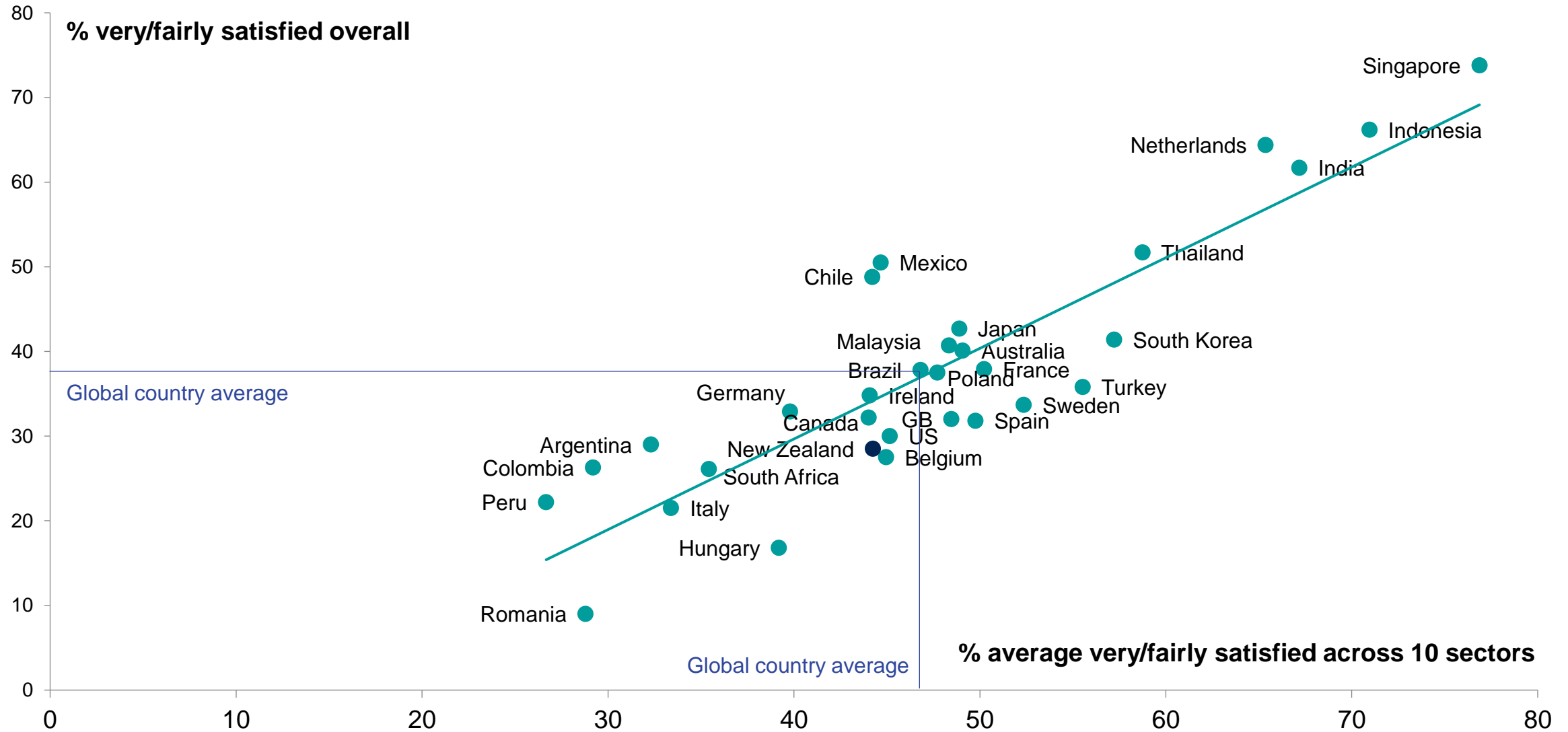
Green / red indicates significantly higher / lower score vs. NZ 2019 results

Source: Ipsos/GIIA

Q. These next questions are about different types of infrastructure in New Zealand. Please indicate how you would rate the current quality of each one in New Zealand.

Base: Global - 22,816 adults (online), 31 countries, May-June 2023; New Zealand – Nov '19 (n=561), May-Jun '23 (n=1,004)

# LOWER AVERAGE SATISFACTION ACROSS THE SECTORS SEEMS TO BE DRIVING LOWER OVERALL SATISFACTION WITH INFRASTRUCTURE



Source: Ipsos/GIIA

Base: 22,816 adults (online), 31 countries, May-June 2023

Correlation = 0.88

# PRIORITIES AND PREFERENCES



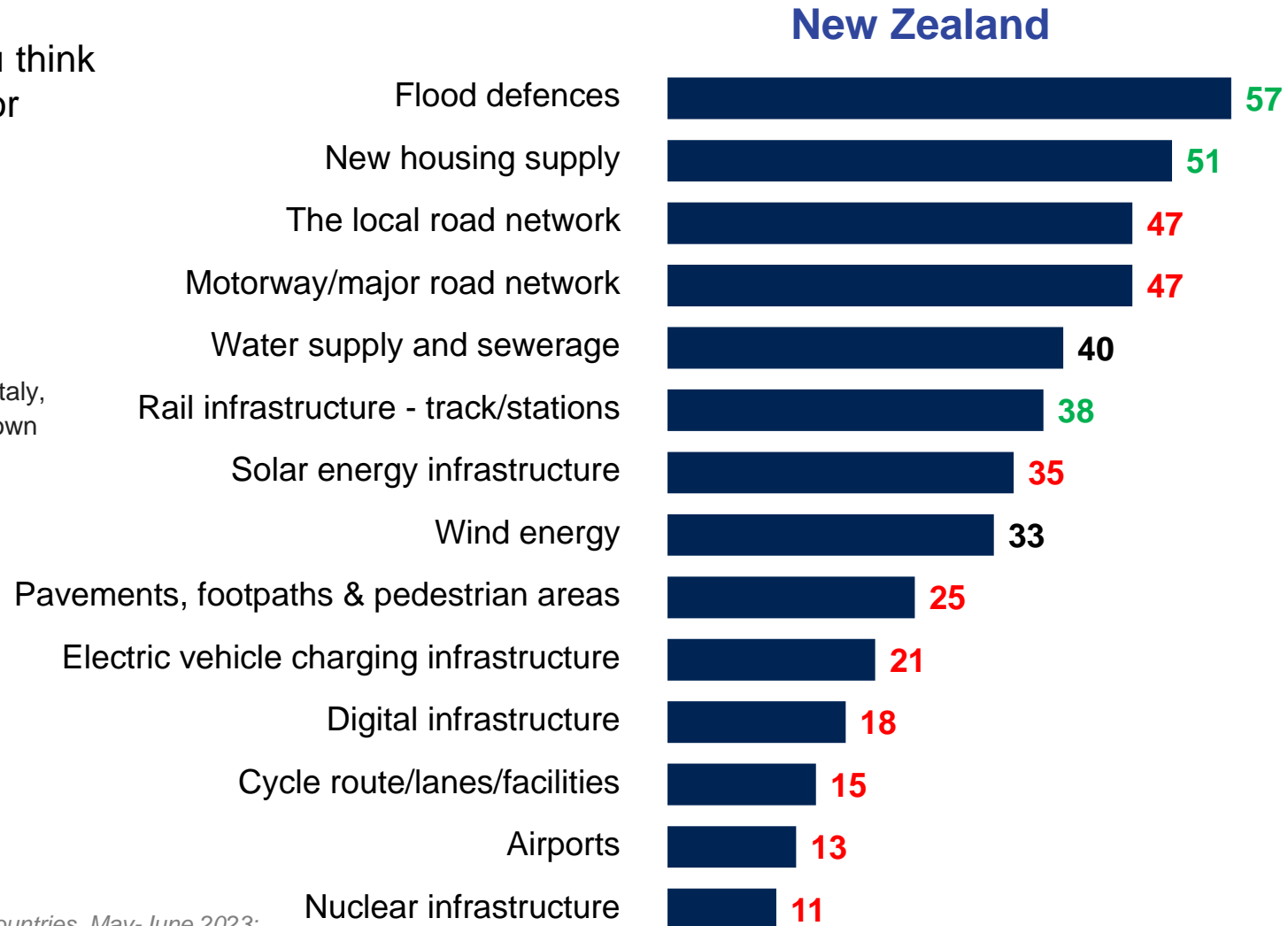
# FLOOD DEFENCES, NEW HOUSING SUPPLY, AND ROADING ARE SEEN AS HIGHEST PRIORITY FOR INVESTMENT IN NEW ZEALAND



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

**% selecting**

Nuclear **not asked** in Australia, Chile, Italy, Malaysia, Peru, Poland, Turkey - % shown based on all countries where asked



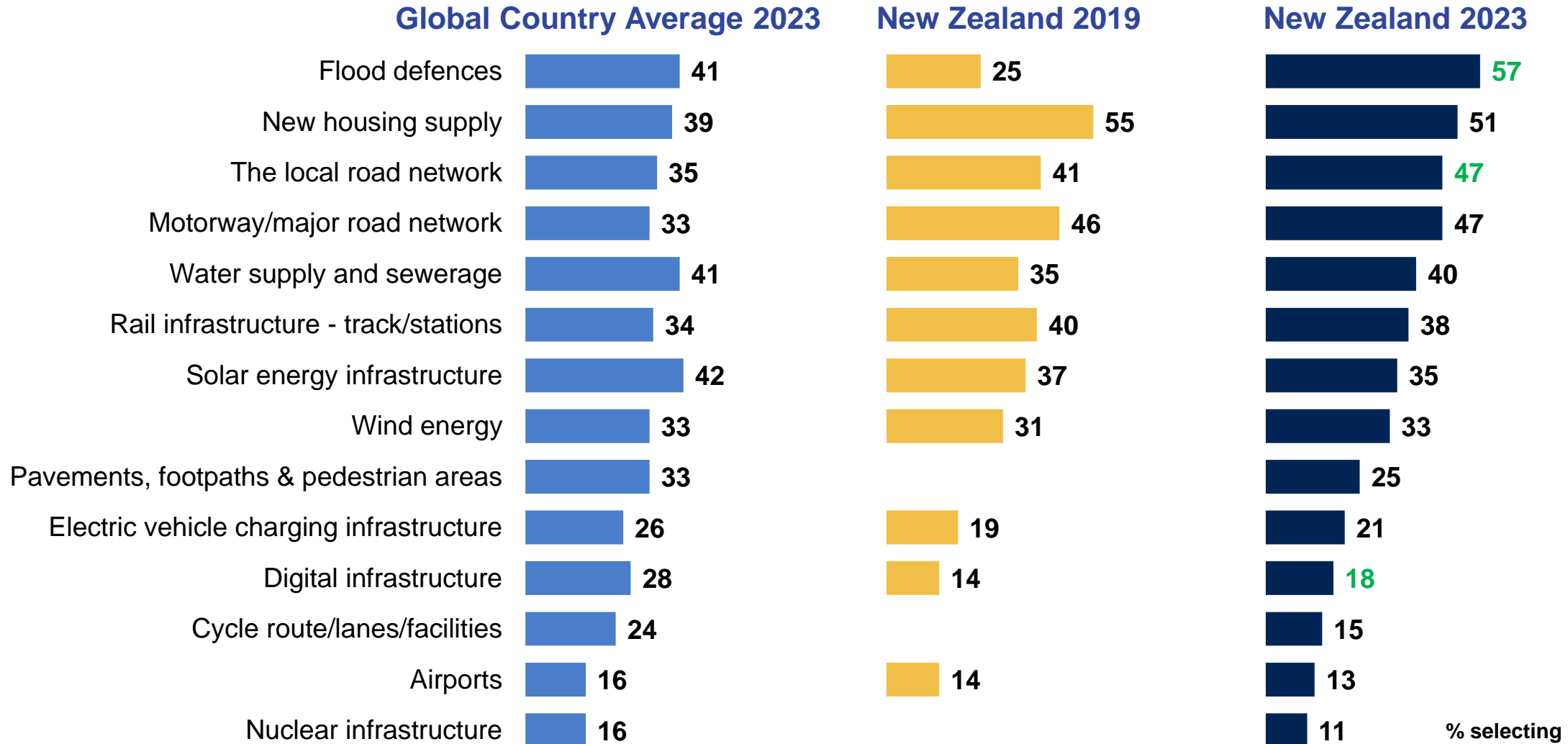
Source: Ipsos/GIIA.  
 Base: Global - 22,816 adults (online), 31 countries, May-June 2023;  
 New Zealand – May-Jun '23 (n=1,004)

Green / red indicates significantly higher / lower score vs. Global results





# FLOOD DEFENCES, THE LOCAL ROAD NETWORK, AND DIGITAL INFRASTRUCTURE ARE ALSO SEEN TO BE INCREASINGLY DUE FOR PRIORITISING COMPARED TO 2019



Green / red indicates significantly higher / lower score vs. NZ 2019 results

Source: Ipsos/GIAA

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

Base: Global: 22-31yo adults (online); 21 countries; Mar-Apr 2023; New Zealand: Nov(10) (n=561); Mar-Apr(22) (n=1,004)



# SIMILARLY TO THE GLOBAL COUNTRY AVERAGE, INCREASED PUBLIC SPENDING TO IMPROVE INFRASTRUCTURE IS ONLY PREFERRED BY A MINORITY

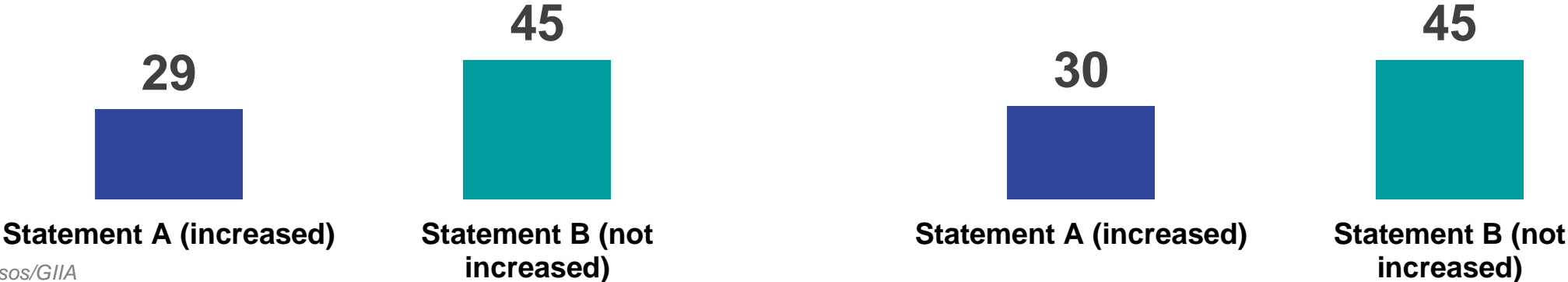
**Statement A: “Spending on improving infrastructure in [COUNTRY] should be increased, even if that means higher taxes or more government borrowing”**

**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”**

**% strongly/tend to prefer each statement**

## Global Country Average

## New Zealand



Source: Ipsos/GIIA

Q. Please read the following pairs of statements, and decide which comes closest to your own opinion. - A: “Spending on improving infrastructure in ... should be increased, even if that means higher taxes or more government borrowing”B: “Public spending in ... is already high and taxes and government borrowing should not be increased any more to spend more on improving infrastructure”

Base: Global - 22,816 adults (online), 31 countries, May-June 2023; New Zealand – Nov ‘19 (n=561), May-Jun ‘23 (n=1,004)



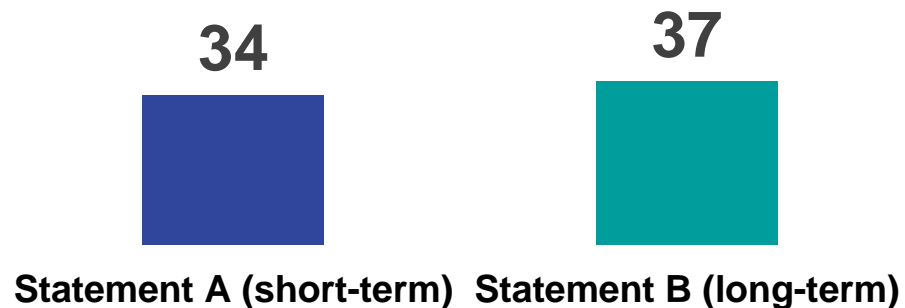
# BUT THE OUTLOOK IN NEW ZEALAND IS ALSO RELATIVELY MORE LONG-TERM

**Statement A:** “When making decisions about infrastructure in [COUNTRY], we should give higher priority to minimising the cost to consumers and taxpayers in the short-term than improving infrastructure in the long-term”

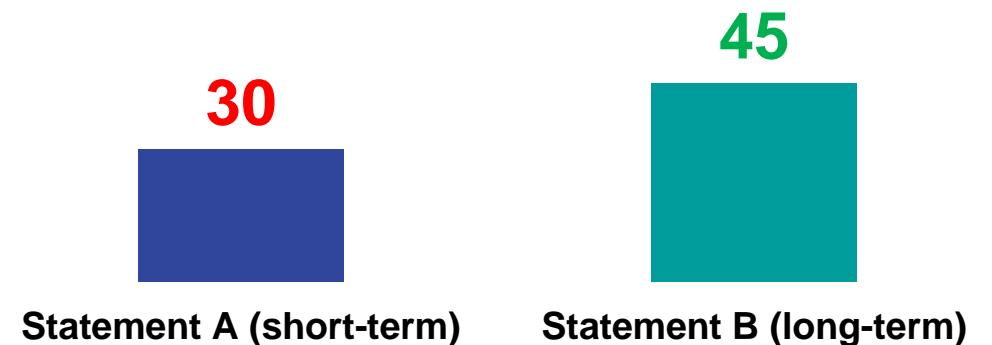
**Statement B:** “When making decisions about infrastructure in [COUNTRY], we should give higher priority to improving infrastructure in the long-term than minimising the cost to consumers and taxpayers in the short-term”

% strongly/tend to prefer each statement

## Global Country Average



## New Zealand



Source: Ipsos/GIIA

Q. Please read the following pairs of statements, and decide which comes closest to your own opinion. - A: “When making decisions about infrastructure in ..., we should give higher priority to minimising the cost to consumers and taxpayers in the short-term than improving infrastructure in the long-term” B: “When making decisions about infrastructure in ..., we should give higher priority to improving infrastructure in the long-term than minimising the cost to consumers and taxpayers in the short-term”

Base: Global - 22,816 adults (online), 31 countries, May-June 2023; New Zealand – May-Jun ‘23 (n=1,004)

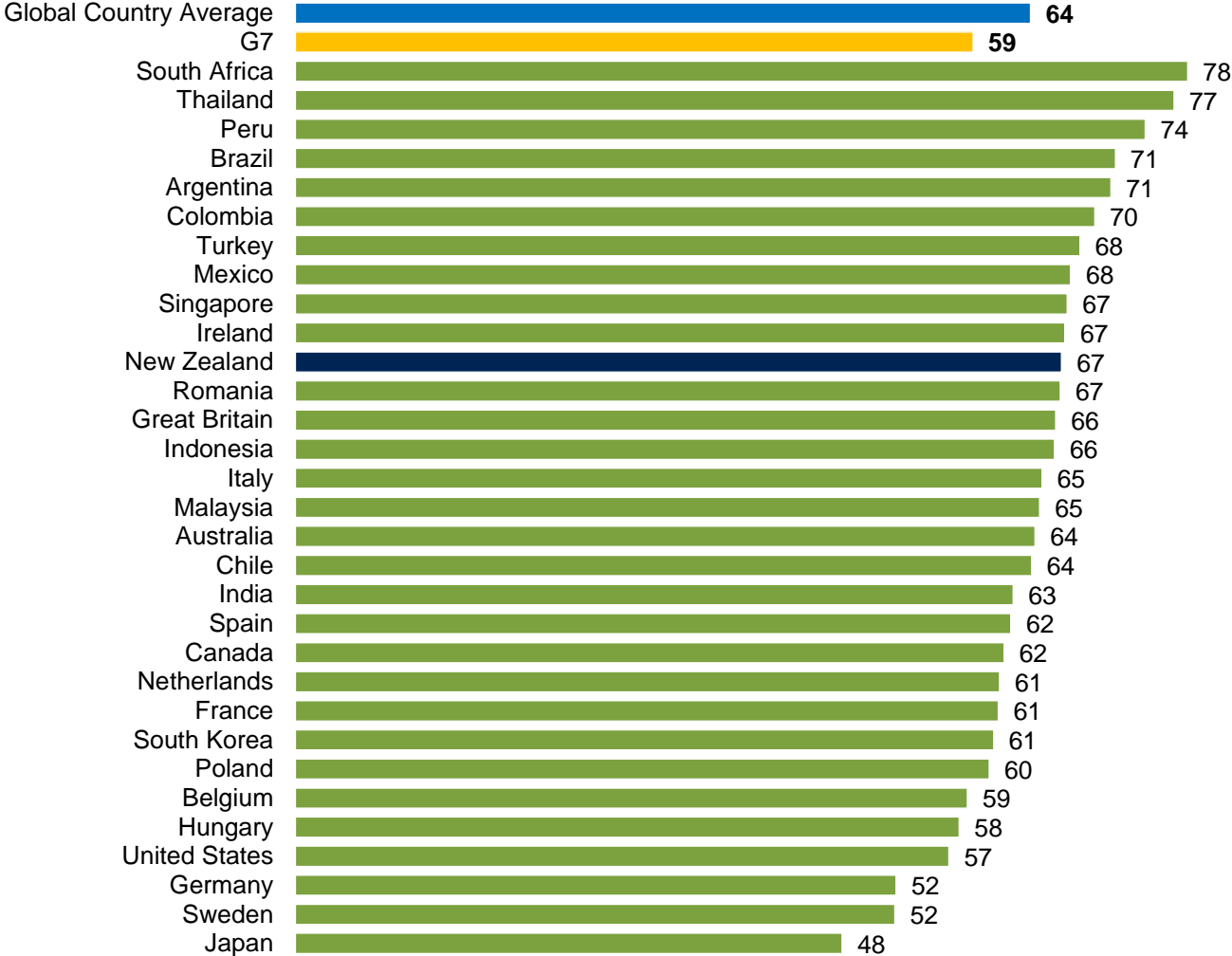
Green / red indicates significantly higher / lower score vs. Global results

# ANOTHER CONSIDERATION IS INTERGENERATIONAL EQUITY

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...?

**“When making decisions about investing in infrastructure in [COUNTRY], we should make sure that the cost of paying for it is spread evenly between current and future taxpayers and customers or generations....”**

**% strongly/tend to agree**



Source: Ipsos/GIIA  
Base: 22,816 adults (online), 31 countries, May-June 2023



# NEW ZEALANDERS ARE MORE LIKELY TO PRIORITISE ENVIRONMENTAL OVER ECONOMIC IMPACT, ALTHOUGH THE CONTRAST IS LOWER THAN THE GLOBAL COUNTRY AVERAGE

**Statement A:** “When making decisions about how to improve infrastructure in [COUNTRY], we should give higher priority to the impact it has on the environment.”

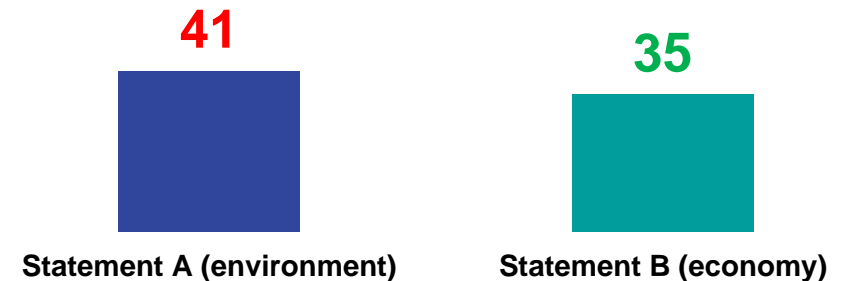
**Statement B:** “When making decisions about how to invest in infrastructure in [COUNTRY], we should give higher priority to the impact it has on the economy.”

% strongly/tend to prefer each statement

## Global Country Average



## New Zealand



Source: Ipsos/GIIA

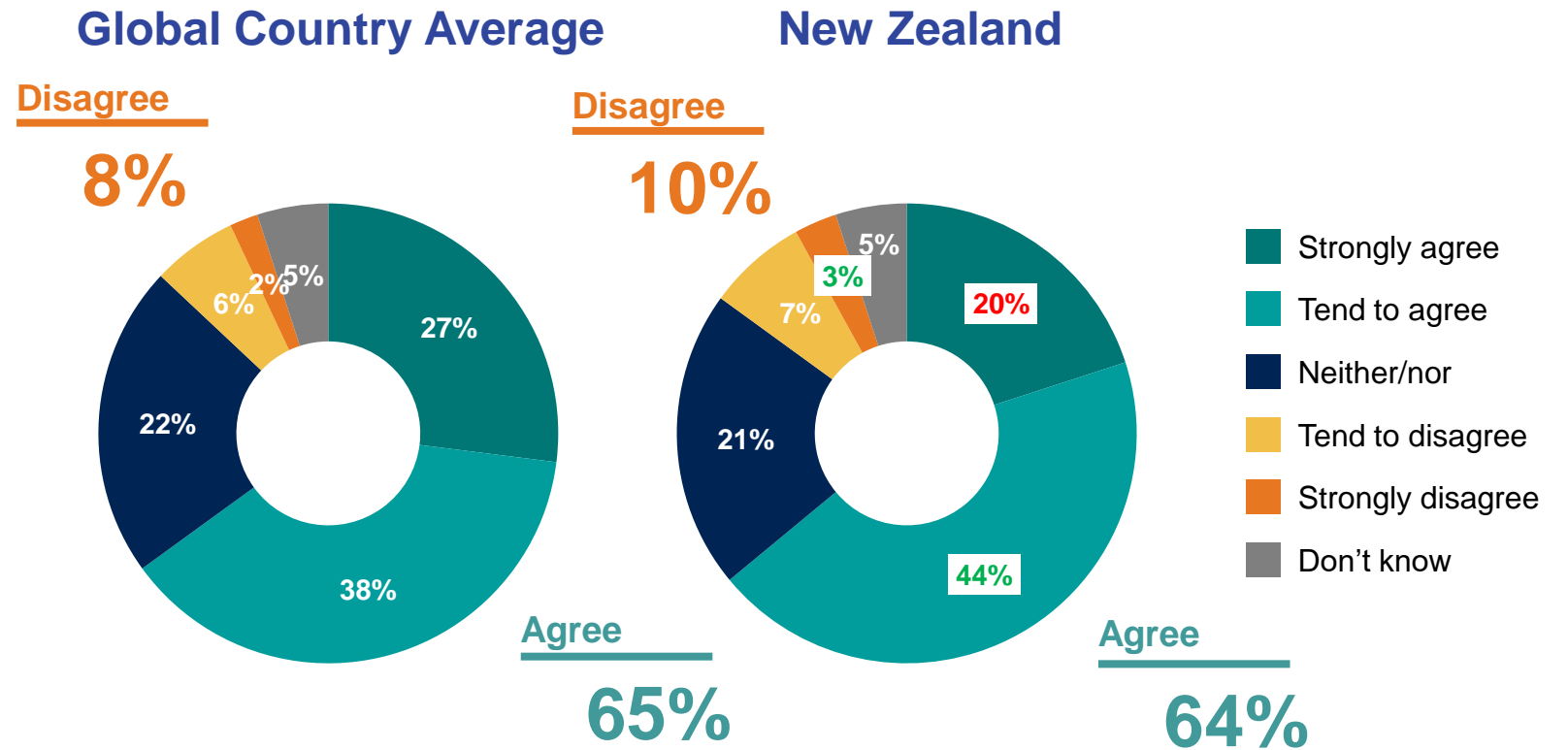
Q. Please read the following pairs of statements, and decide which comes closest to your own opinion. - A: “When making decisions about how to improve infrastructure in ..., we should give higher priority to the impact it has on the environment” B: “When making decisions about how to invest in infrastructure in ..., we should give higher priority to the impact it has on the economy”

Base: Global - 22,816 adults (online), 31 countries, May-June 2023; New Zealand – May-Jun ‘23 (n=1,004)

# ...BUT MOST DO NOT WANT TO COMPROMISE OPPORTUNITIES FOR LOCAL COMMUNITIES TO SHAPE PLANS

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...?

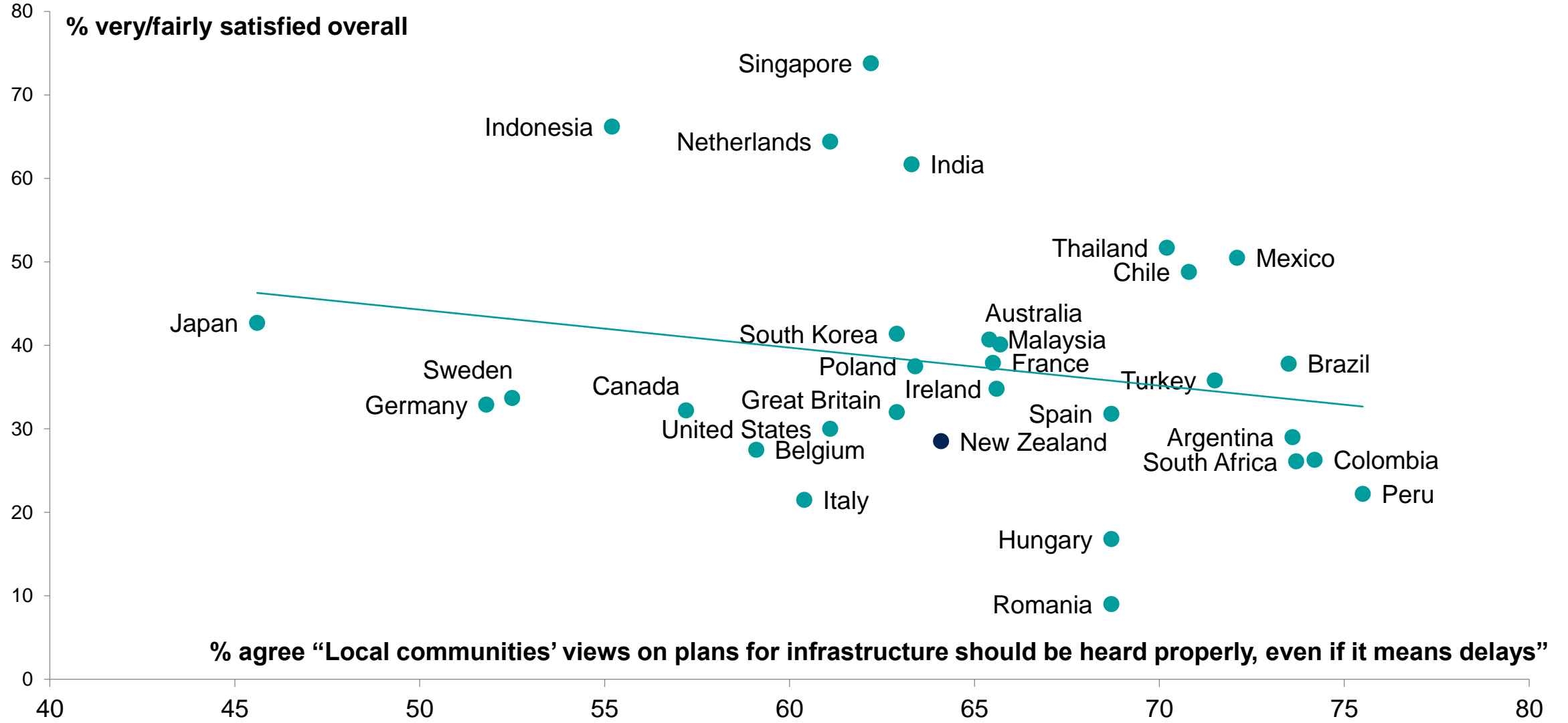
**“Local communities’ views on plans for infrastructure should be heard properly, even if it means delays”**



Source: Ipsos/GIIA  
 Base: Global - 22,816 adults (online), 31 countries, May-June 2023; New Zealand (n=1,004)

Green / red indicates significantly higher / lower score vs. Global results

# BUT THERE IS A WEAK RELATIONSHIP BETWEEN SATISFACTION WITH INFRASTRUCTURE AND SUPPORT FOR LOCAL ENGAGEMENT



Source: Ipsos/GIIA

Base: 22,816 adults (online), 31 countries, May-June 2023

Correlation = -0.23

# APPENDIX

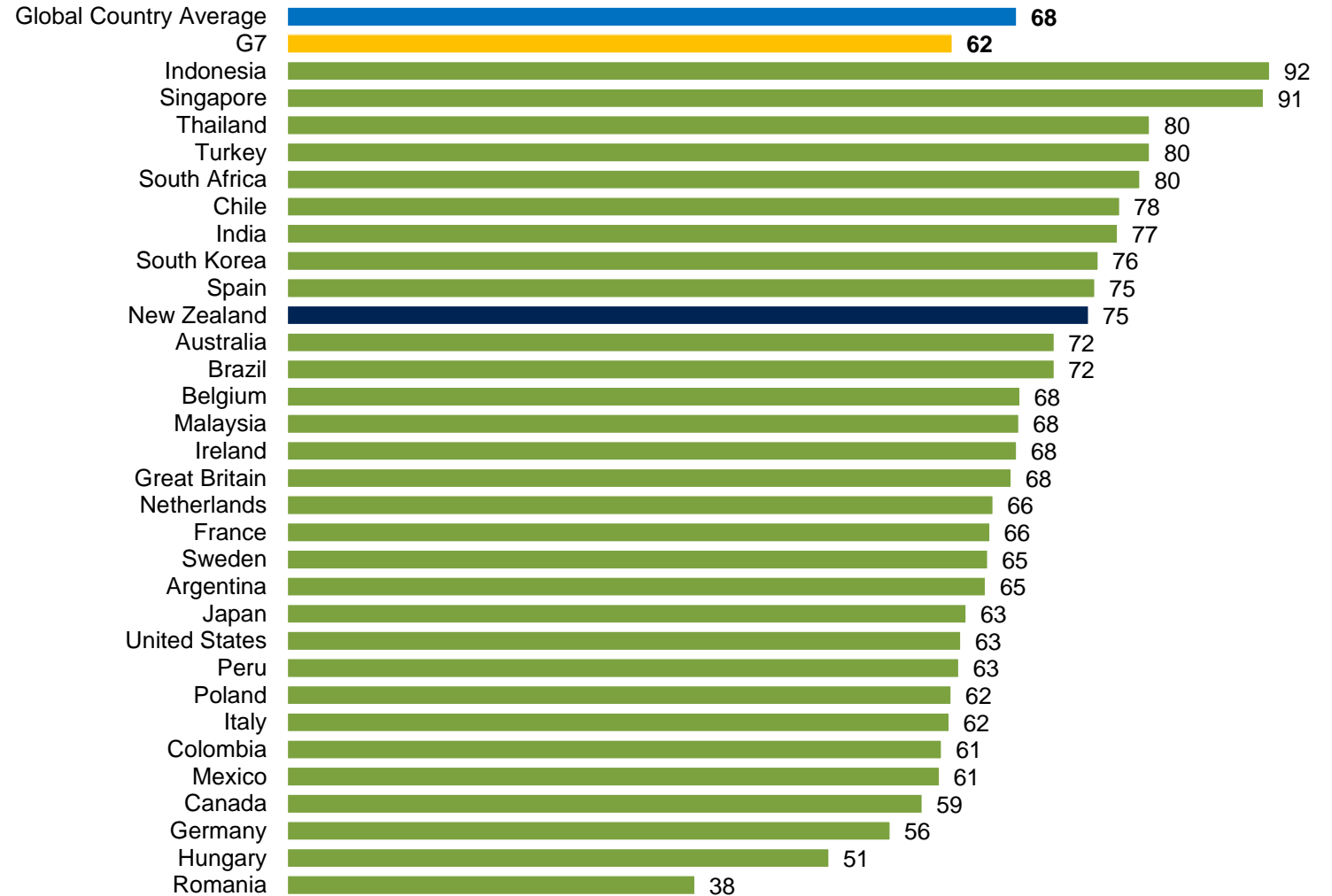


# RATINGS - AIRPORTS

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/GIIA

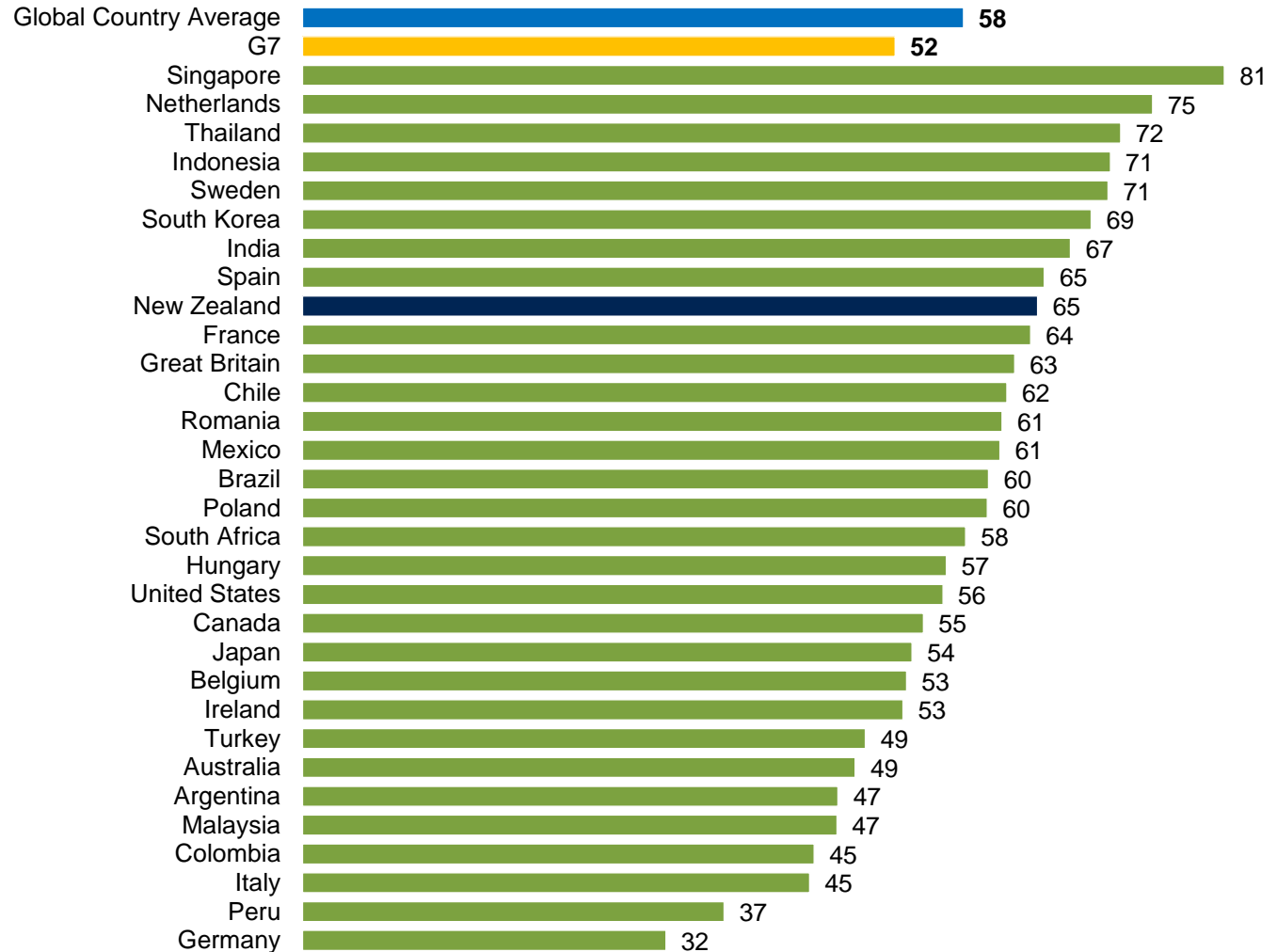
Base: 22,816 adults (online), 31 countries, May-June 2023

# RATINGS - DIGITAL 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]...

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

**% very/fairly good**



Source: Ipsos/GIIA

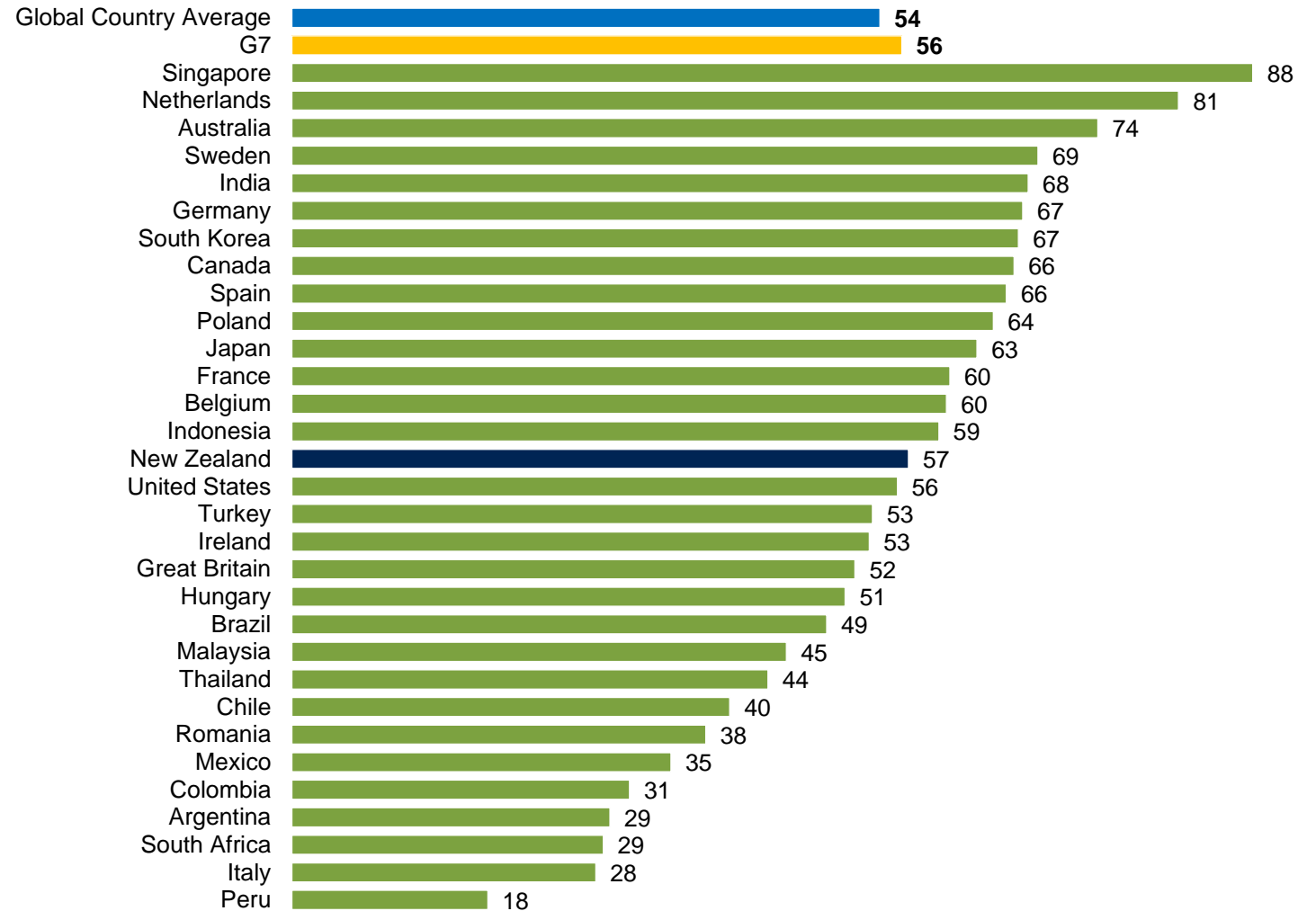
Base: 22,816 adults (online), 31 countries, May-June 2023

# RATINGS - 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/GIIA

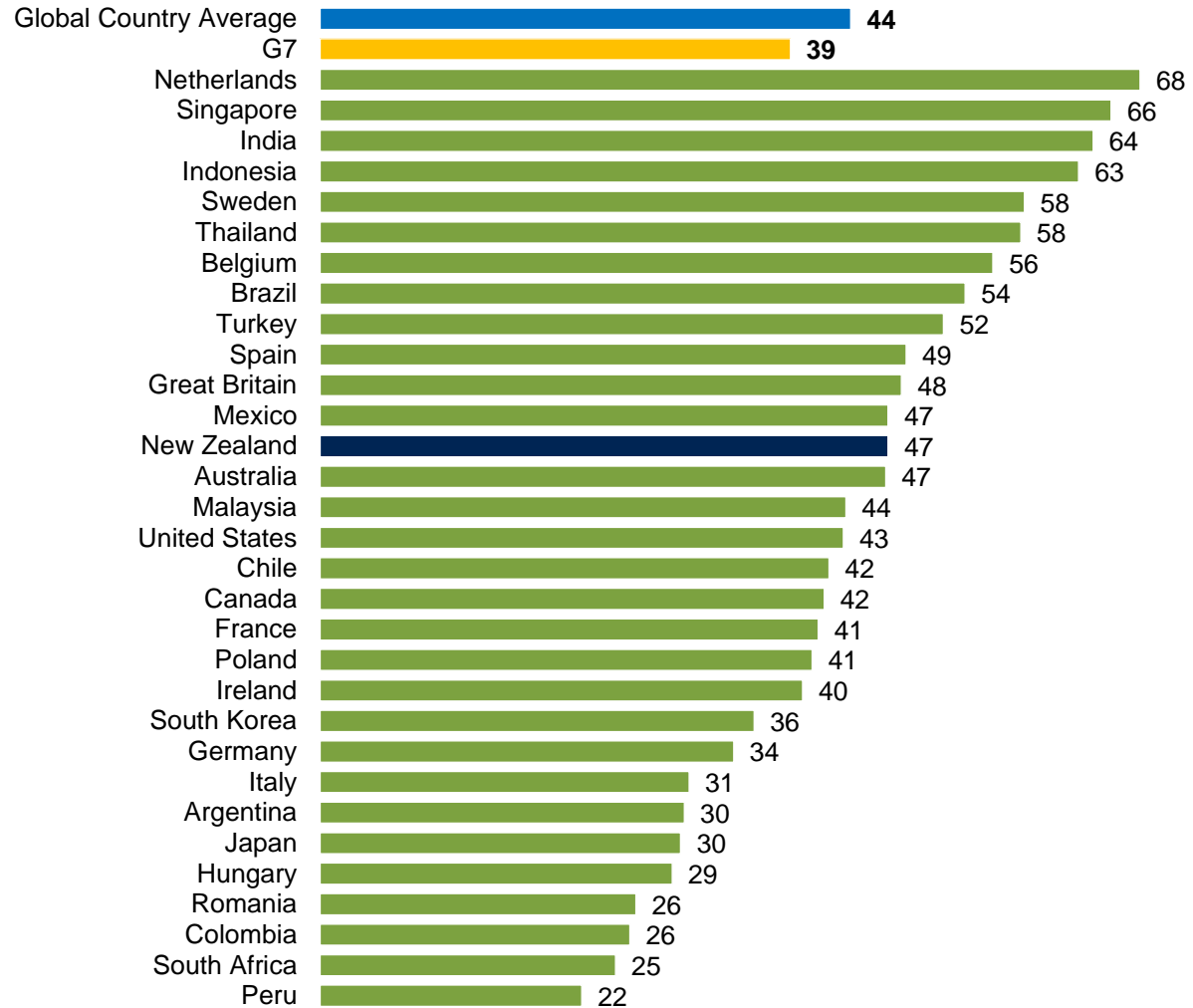
Base: 22,816 adults (online), 31 countries, May-June 2023

# RATINGS - RENEWABLE ENERGY 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]...

**Renewable energy infrastructure**  
e.g. solar and wind energy

% very/fairly good



Source: Ipsos/GIIA

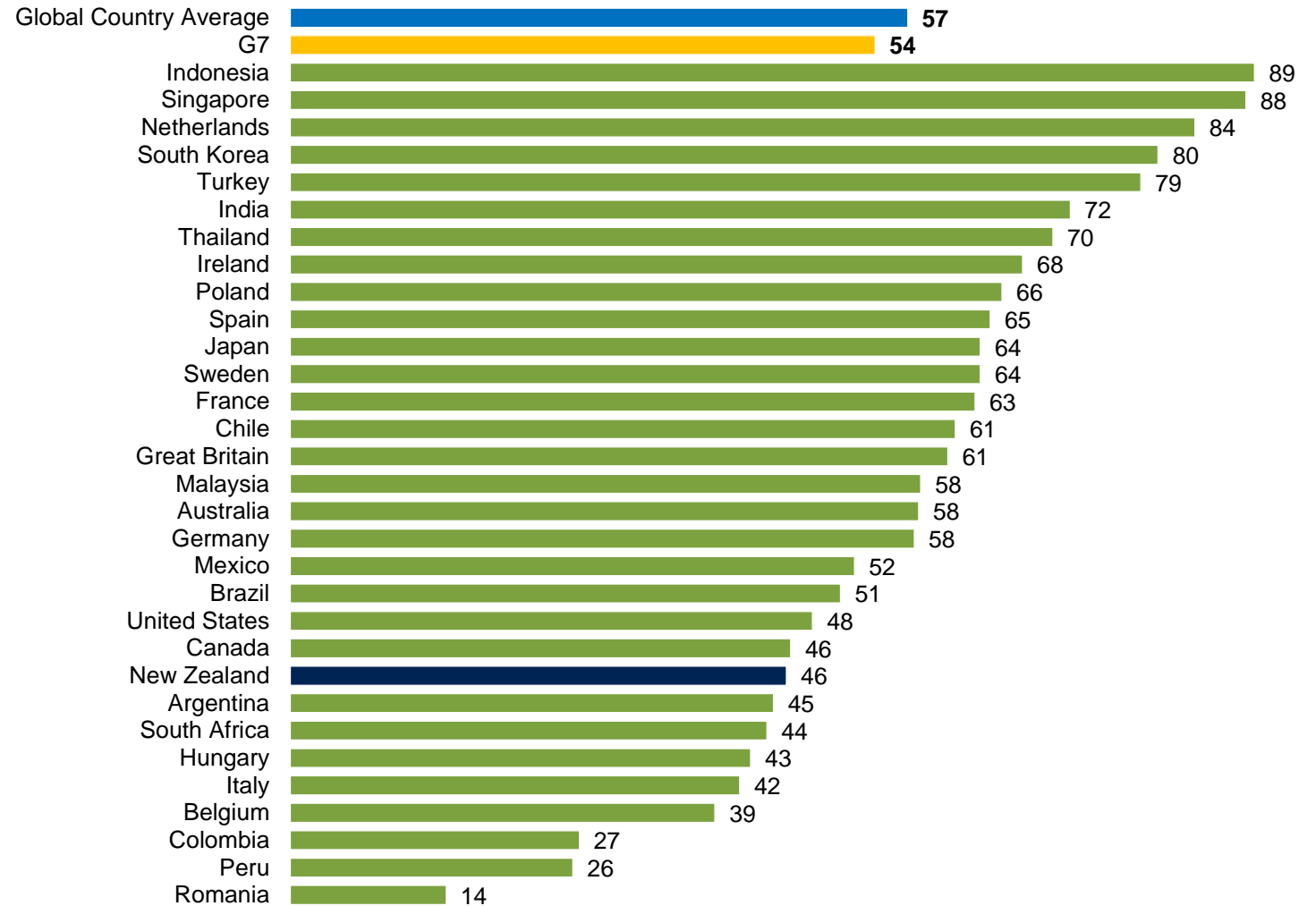
Base: 22,816 adults (online), 31 countries, May-June 2023

# RATINGS - 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



Source: Ipsos/GIIA

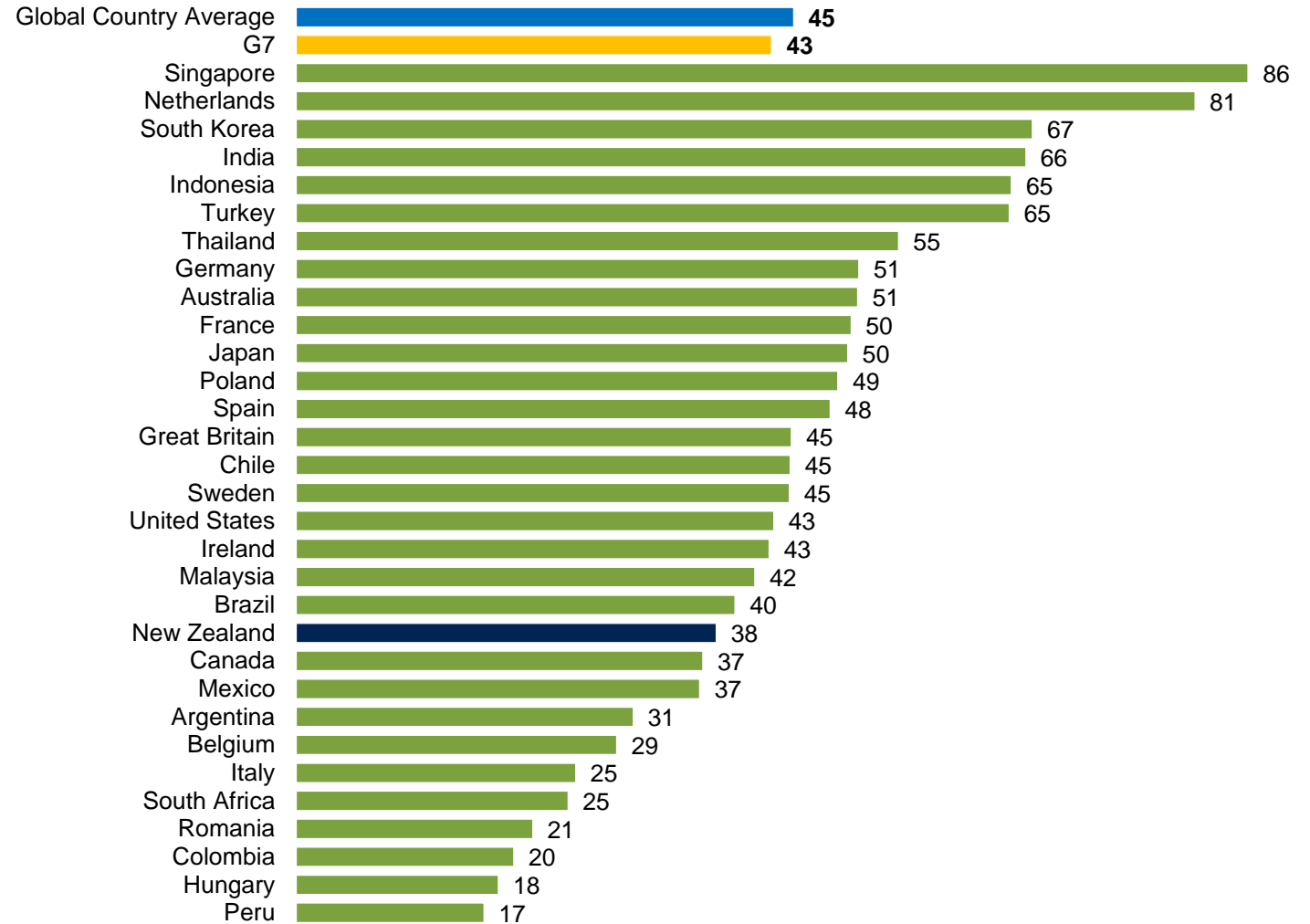
Base: 22,816 adults (online), 31 countries, May-June 2023

# RATINGS - 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



Source: Ipsos/GIIA

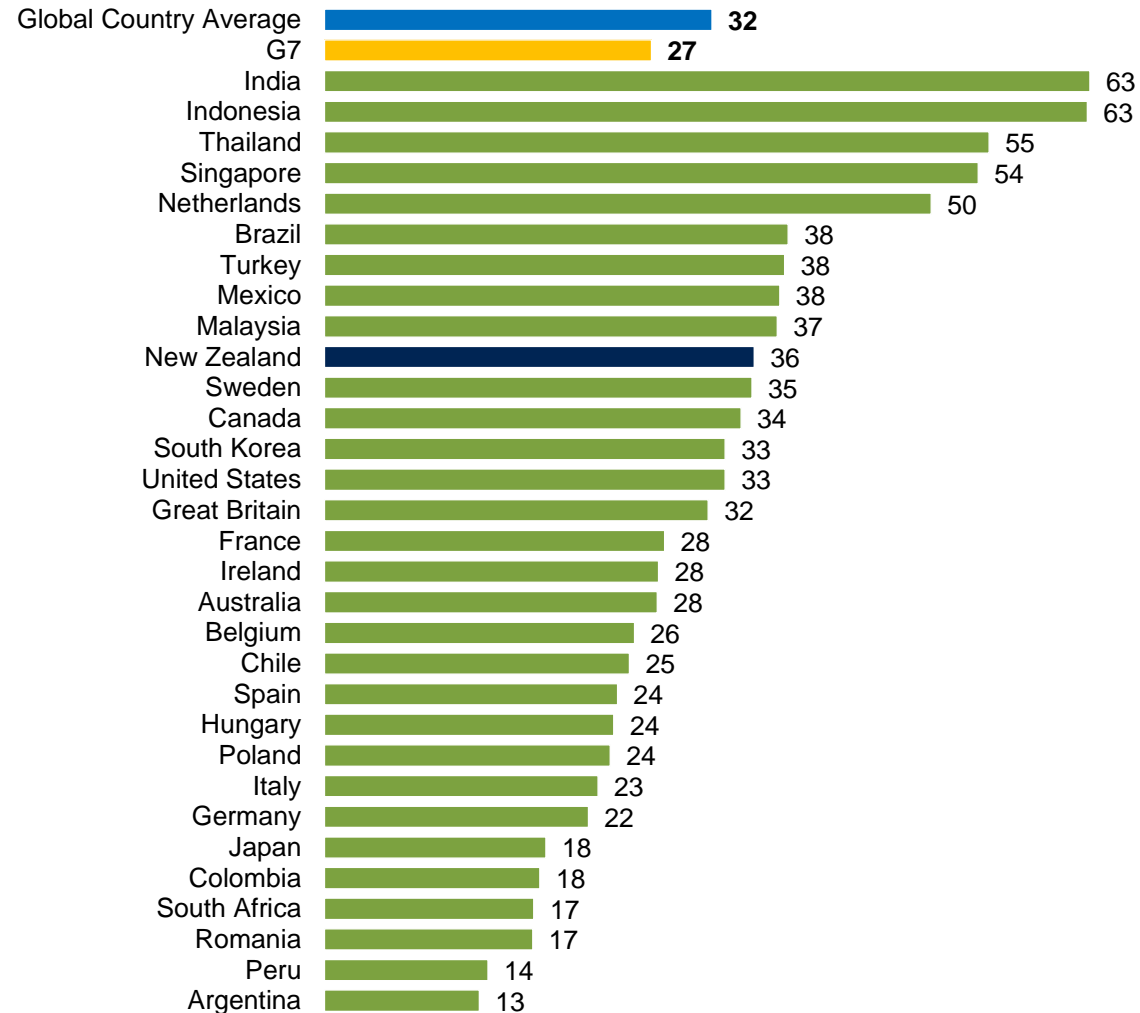
Base: 22,816 adults (online), 31 countries, May-June 2023

# RATINGS - ELECTRIC VEHICLE CHARGING 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]...

## Electric vehicle charging infrastructure

% very/fairly good



Source: Ipsos/GIIA

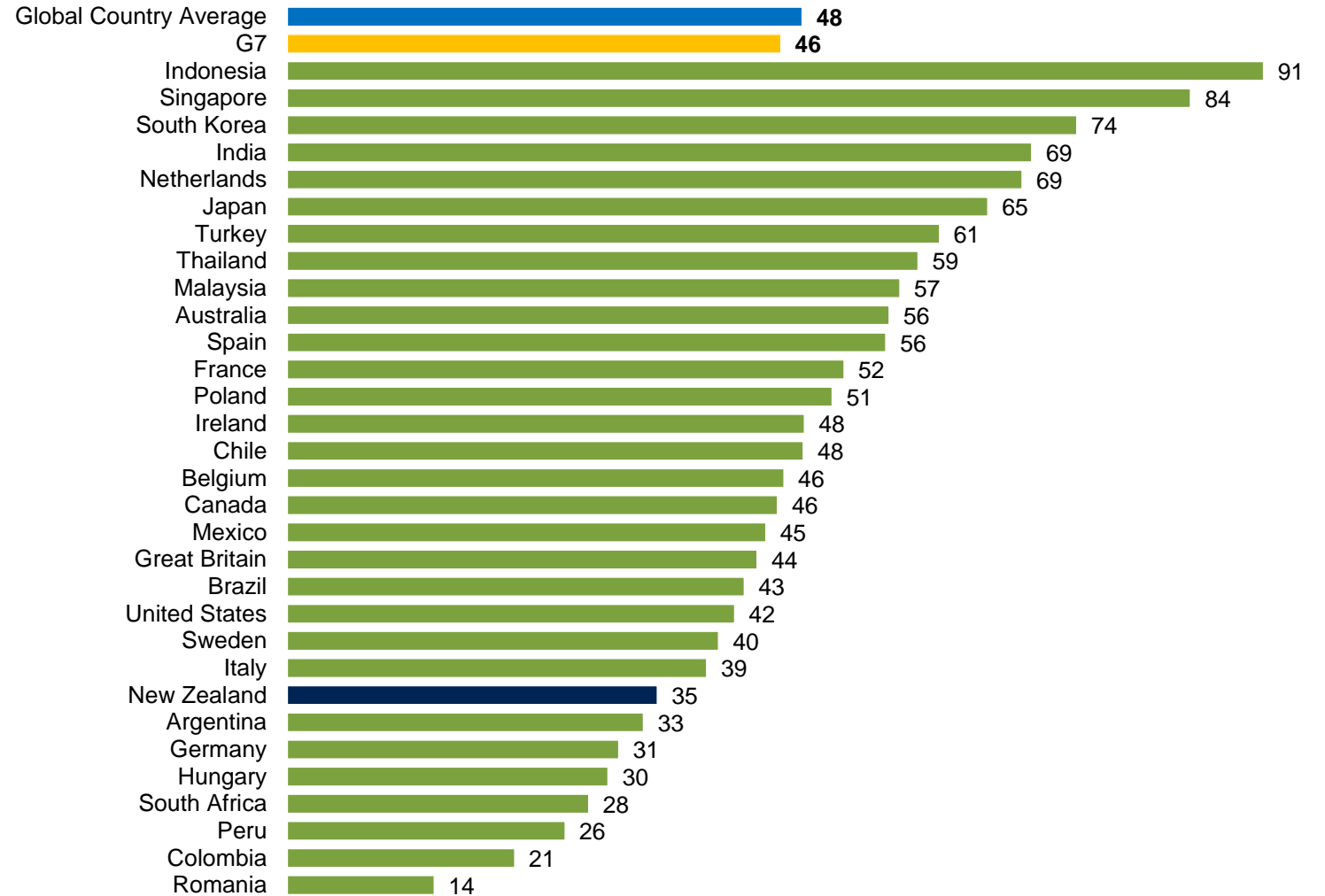
Base: 22,816 adults (online), 31 countries, May-June 2023

# RATINGS - 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



Source: Ipsos/GIIA

Base: 22,816 adults (online), 31 countries, May-June 2023

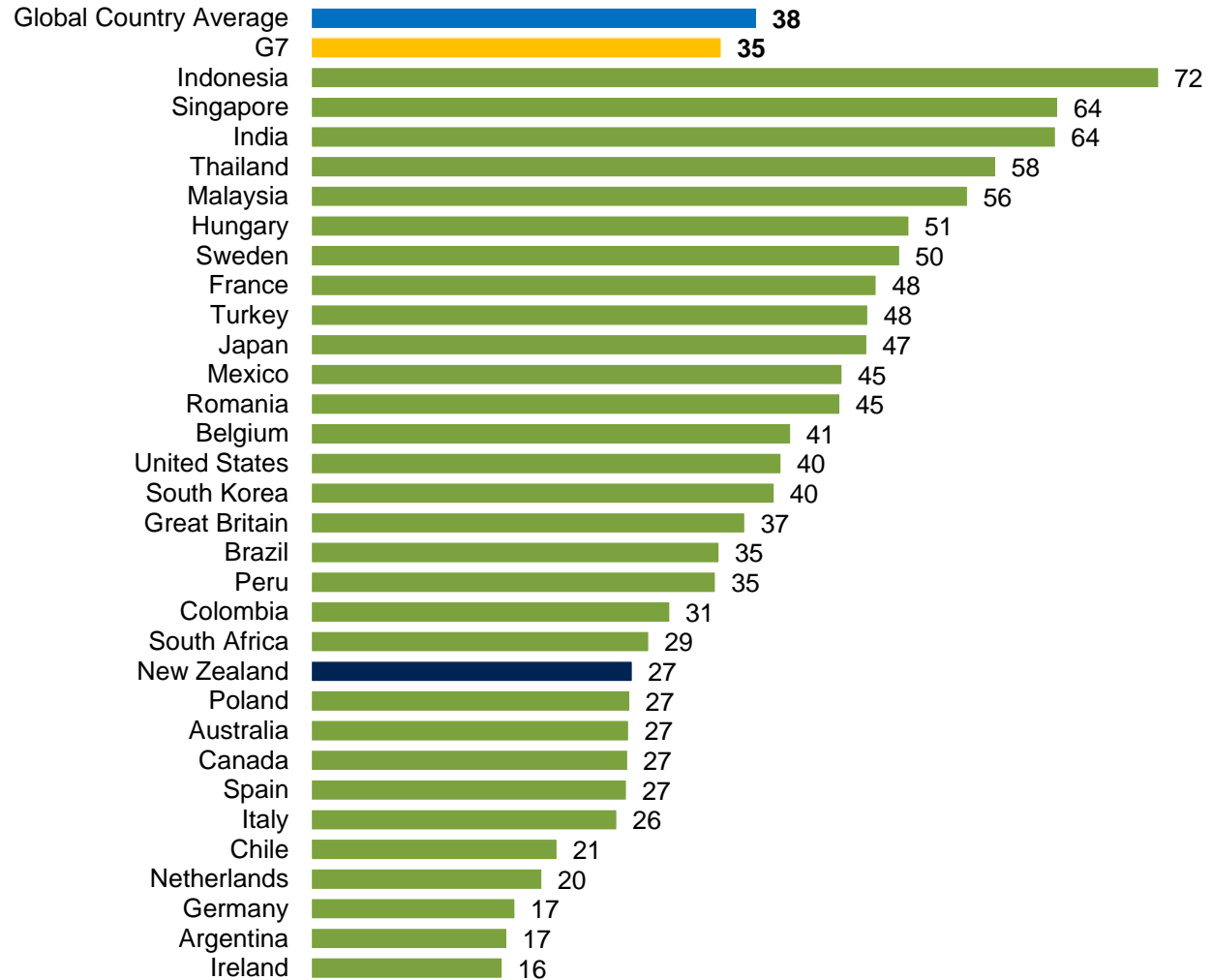


# RATINGS - NEW HOUSING SUPPLY

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



Source: Ipsos/GIIA

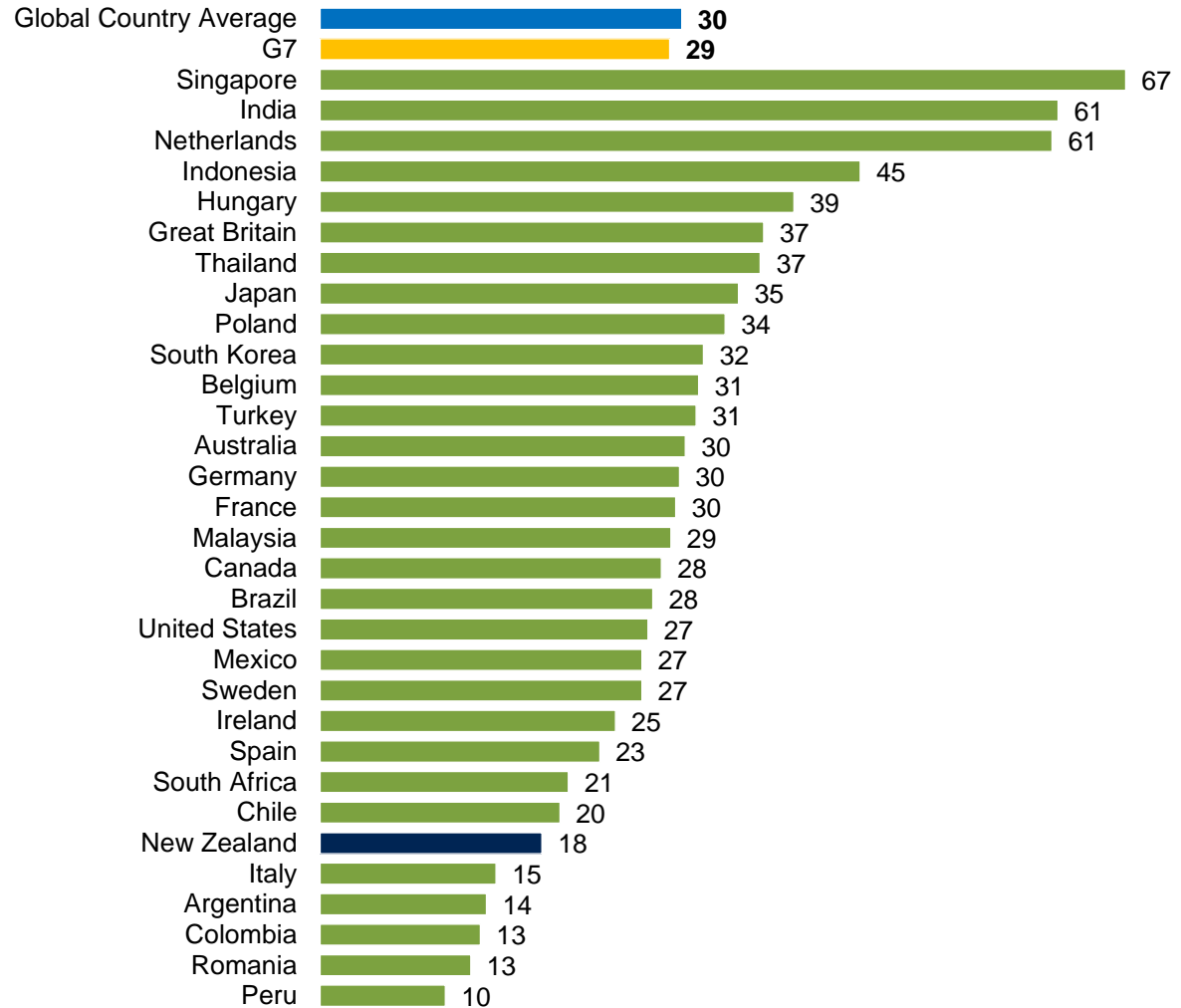
Base: 22,816 adults (online), 31 countries, May-June 2023

# RATINGS - 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



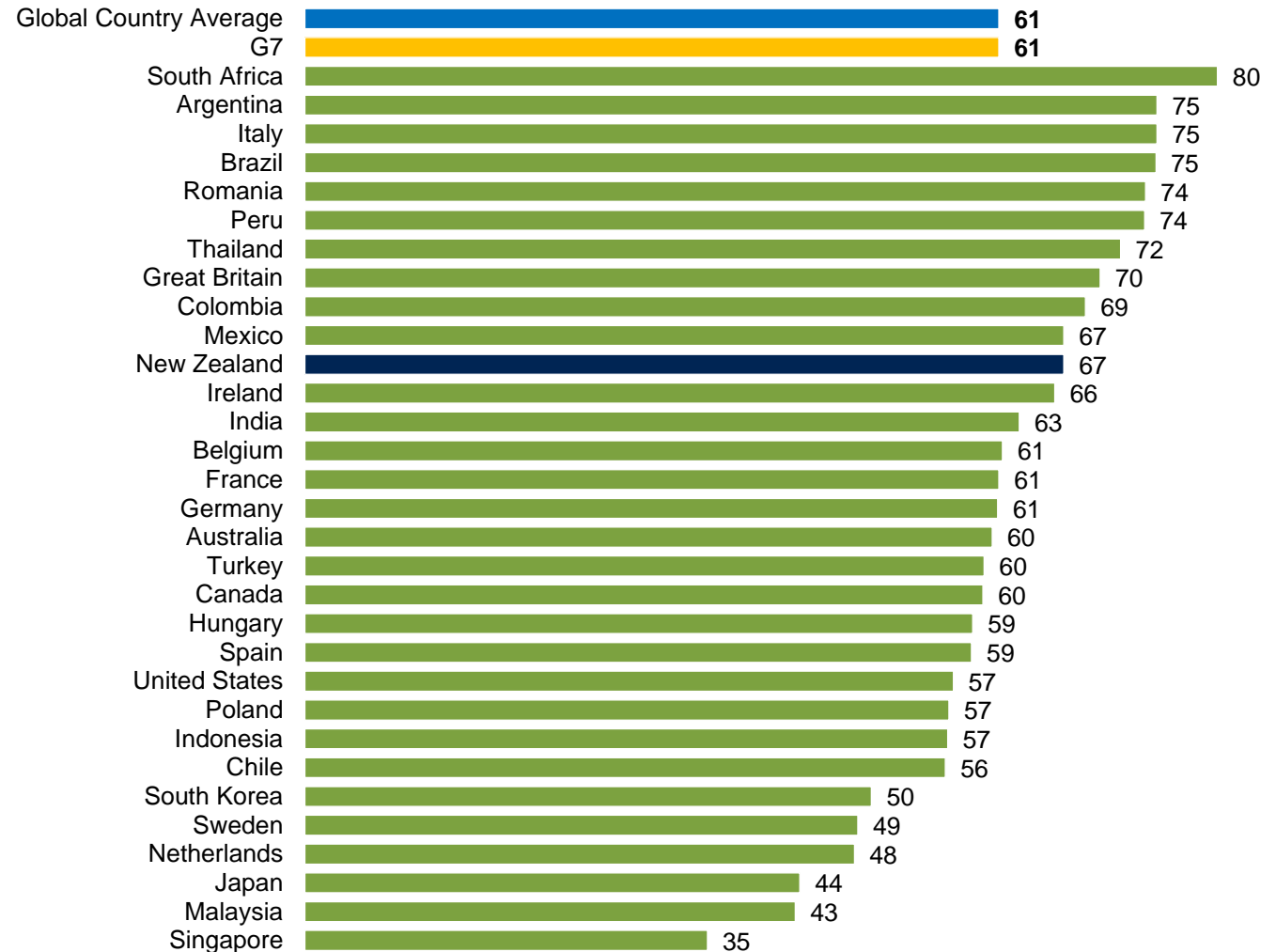
Source: Ipsos/GIIA  
Base: 22,816 adults (online), 31 countries, May-June 2023

# MOST PEOPLE DOUBT INFRASTRUCTURE HAS BEEN ADAPTED FOR FUTURE CHANGES IN THE CLIMATE

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 don’t think infrastructure in [COUNTRY]...has been adapted enough to cope with future changes in the climate”**

**% strongly/tend to agree**



Source: Ipsos/GIIA

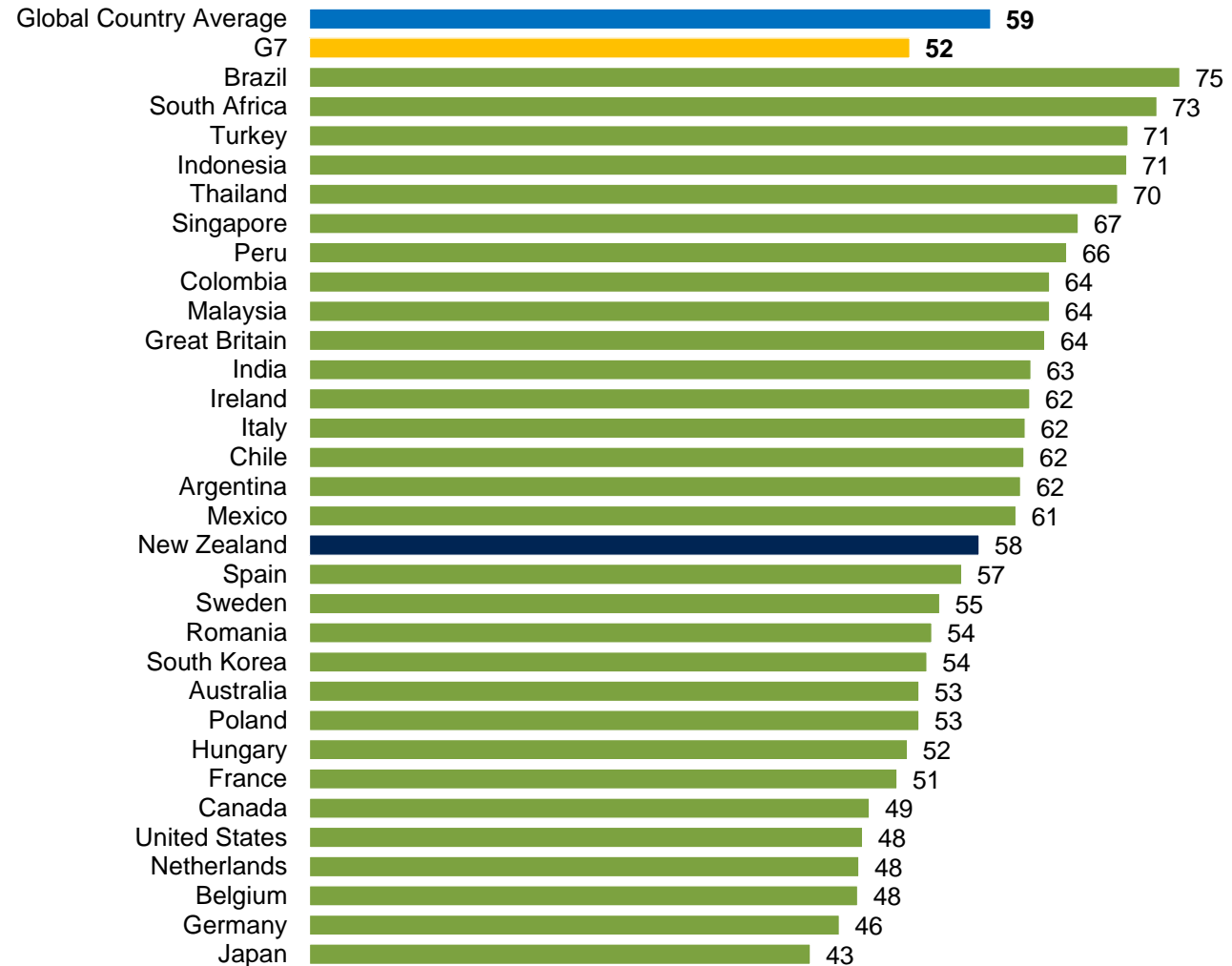
Base: 22,816 adults (online), 31 countries, May-June 2023

# ...AND THAT IT CAN MAKE AN IMPORTANT CONTRIBUTION TO COMBATING CLIMATE CHANGE

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 make an important contribution to combating climate change”**

**% strongly/tend to agree**



Source: Ipsos/GIIA

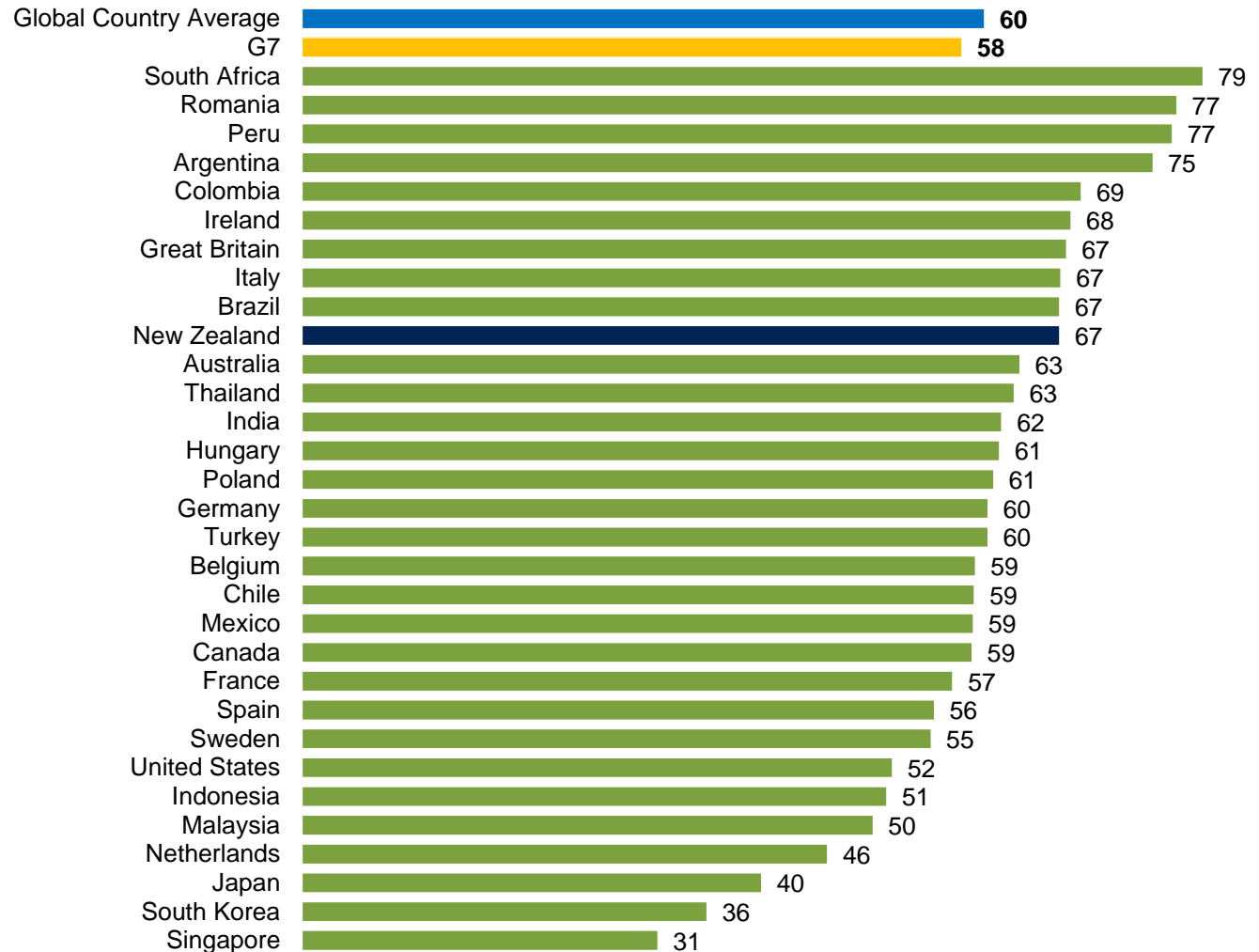
Base: 22,816 adults (online), 31 countries, May-June 2023

# THERE IS A WIDELY HELD VIEW THAT BUILDING IS NOT QUICK ENOUGH, ESPECIALLY WHERE DISSATISFACTION WITH INFRASTRUCTURE IS HIGHEST...

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...?

**“We are not building the infrastructure we need quickly enough”**

**% strongly/tend to agree**



Source: Ipsos/GIIA

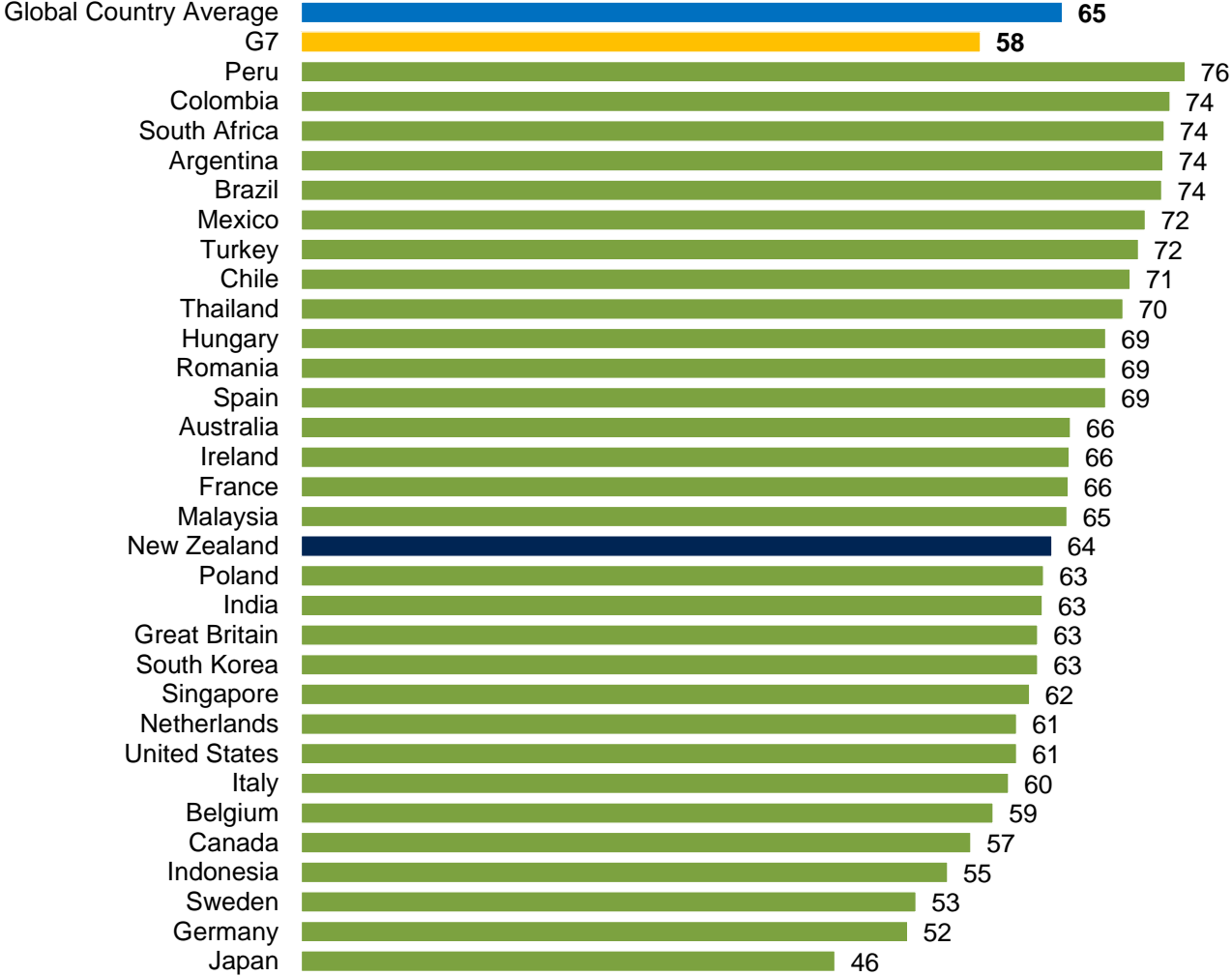
Base: 22,816 adults (online), 31 countries, May-June 2023

# G7 COUNTRIES AND COUNTRIES WHERE THERE IS HIGHER SATISFACTION WITH INFRASTRUCTURE ARE *RELATIVELY* COOLER ON ENGAGEMENT

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...?

**“Local communities’ views on plans for infrastructure should be heard properly, even if it means delays”**

**% strongly/tend to agree**



Source: Ipsos/GIIA  
 Base: 22,816 adults (online), 31 countries, May-June 2023



# REGIONS

Regions and unweighted sample sizes

## Europe

8,510

Belgium  
France  
Germany  
Great Britain  
Hungary  
Ireland  
Italy  
Netherlands  
Poland  
Romania  
Spain  
Sweden

## N. America

2,007

Canada  
U.S.A.

## LATAM

3,506

Argentina  
Brazil  
Chile  
Colombia  
Mexico  
Peru

## Asia-Pacific (APAC)

7,792

Australia  
India  
Indonesia  
Japan  
Malaysia  
New Zealand  
Singapore  
South Korea  
Thailand

## ME Africa

1,503

South Africa  
Turkey



**G7**  
7,010

Canada, France, Germany, Great Britain, Italy, Japan, U.S.A.  
(Russia excluded)

# FURTHER INFORMATION



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