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Foreword

The National Infrastructure Commission has been set up to establish the UK’s future needs for nationally significant infrastructure. A long term strategy for investment in infrastructure is vital to maintaining the UK’s competitiveness amongst the G20 nations and to provide greater certainty in support of a long-term approach to the major investment decisions facing the country.

We need long-term forward plans and the maximum possible consensus amongst politicians and the public, based on well researched evidence about what our country needs to support a sustainable future. That is what the National Infrastructure Commission is here to promote.

One of the major challenges that infrastructure providers continue to face in the UK is public acceptability and understanding of the need for investment in infrastructure. The case for specific infrastructure investments can often divide public opinion.

Attempts to articulate the need and benefits are generally left to individual projects or promoters to argue. We need to broaden out this debate and establish a compelling case within the minds of the public of the need for and benefits of infrastructure investment.

The insights that this independent survey provides on public attitudes to infrastructure in Britain are timely and helpful as we develop the Commission’s objectives and plans. I welcome its conclusions supporting the establishment of the National Infrastructure Commission and the need for better engagement.

I will ensure that the Commission places the needs and views of the UK public at the heart of a long-term strategy and responds to the clear demand for a more strategic two-way conversation. It is now up to us all to take the findings of this report forward and build the broad coalition of support we need to secure the projects of the future.

Andrew Adonis
National Infrastructure Commission
Executive Summary

This independent industry survey, led by Copper Consultancy in partnership with Peter Brett Associates and carried out by Icaro, sought to identify the gaps in our collective understanding about infrastructure. What does infrastructure mean to British people and what are their attitudes towards it? Do they support investment in infrastructure and why? What common ground is there between British people, industry and Government? What would give them confidence and encourage people to support infrastructure?

Britain supports infrastructure investment. In fact, British people want to know how they can get involved in supporting infrastructure in a more direct way and they want to see the benefits.

The survey shows that British people think we should be aspiring for world leading infrastructure or solid improvements. They believe the UK is capable of delivering infrastructure. British people think we have, or used to have, world leading infrastructure delivery skills; they can identify with the country’s infrastructure pedigree.

However, at present, British people feel that infrastructure happens ‘to them’ not ‘for them’. The country does not know about the National Infrastructure Plan. Only six per cent of British people think the UK has a well-coordinated national or local plan. However, the country is reassured to know a plan (national or local) exists. They want to know that technical experts are driving it.

When the benefits of a project are made clear, people sit up, take note and ask for more of the same. British people said they want to be kept informed about infrastructure planning and development and involved in plan-making and delivery of infrastructure projects but do not currently feel able to do so. But there are caveats to this involvement and support.

What do British people want in return for support? In one word – leadership:

1. British people want leadership from industry and policy makers. They trust industry to make the right decisions, but they want to understand what it is doing and why it is doing it.
2. British people want to hear from technical experts and decision makers and are seeking reassurance that infrastructure is part of an integrated plan. The research supports the idea of the National Infrastructure Commission.
3. British people want to discuss major infrastructure needs in their area, both strategic plans and specific projects and they want to be involved in a two-way conversation and to help them understand the benefits. The benefit to UK PLC of opening this discussion is wider public acceptance and reduced risk to projects.

Linda Taylor
Director, Copper Consultancy
Introduction

This report outlines the key findings from qualitative and quantitative research undertaken with adults aged 18+ in Great Britain.

In partnership with other key stakeholders Copper identified a need to build up an evidence base which supported a hypothesis that there is potential for more common ground and consensus in Britain in support of infrastructure investment. The study tested the idea that the public can see the benefits and want more investment and the results show there is a job to do in building public confidence about how it happens.

The initial theories were:

- Britain supports infrastructure investment
- The public is interested and supportive of common sense, good ideas and value for money
- British people want to talk about infrastructure with those involved in developing it
- British people welcome the benefits of infrastructure
- The public accepts that investment in infrastructure will lead to an improvement in the economy and the way we live and that it means we pass on a more advanced country to the next generation
- However, infrastructure is not explained in a way which British people can relate to easily
- British people feel that when a project is proposed near them, it happens ‘to them’ not ‘for them’, or projects happen ‘to Britain’ not ‘for Britain’
- When a project is proposed near an individual and it has an impact, not enough is done by developers to involve individual people when shaping plans and listening to how these impacts can be mitigated
- The public does not understand the Nationally Significant Infrastructure Project planning process or how it relates to the National Infrastructure Plan
- The public does not know ‘who to call’ about infrastructure or who ‘owns’ the delivery of new roads, railways, power stations and homes
- British people do not trust or believe the messages about the need for infrastructure on individual projects
- British people do not see how one project fits into the overall plan.

This document is arranged into six sections, looking at the following aspects:

- Section 1: Understanding of, and attitudes to, existing infrastructure
- Section 2: Priority issues for infrastructure investment
- Section 3: Attitudes to future infrastructure and development
- Section 4: Delivering future infrastructure: building confidence
- Section 5: Methodology
- Section 6: Conclusions.

Copper, in partnership with Peter Brett Associates, commissioned Icaro – a specialist research agency. Four focus groups were undertaken alongside a survey of 2,000 British people (with an additional 500 people in urban areas) that asked them for their views on infrastructure investment priorities including housing, plan making, policy, and if and how they would like to get involved.
Attitudes to infrastructure

This section explores levels of understanding about infrastructure, and looks at attitudes to the country’s existing infrastructure.

Understanding of infrastructure

The word ‘infrastructure’ is readily understood and often immediately associated with local transport networks/access. There is also recognition of utility networks, although these are less front of mind and often considered ‘out of sight, out of mind’. In general, the focus groups demonstrated a high level of awareness and recognition of the role that infrastructure plays in their towns and cities – with many participants (particularly in urban areas) pointing to recent improvements:

“We’ve got good access - close to Manchester, the airport, countryside.”
Female (F), Stockport

“It [pipe network] is obviously important but also kind of out of sight, out of mind.”
Male (M), Bristol

“The waterfront area has gone through a massive transformation. Now it’s a destination and people come to spend the weekend here.”
M, Bristol

In particular, in the London focus group, there was a notably wider conceptualisation of infrastructure, including services such as policing as well as street spaces, utilities, housing and education and health facilities.

“The basis for everything that keeps the system running and stops it breaking down.”
M, London

“Networks and grids – it’s like a big map of how everything is organised in the city.”
F, London

Views towards existing infrastructure

The CBI’s research in 2014\(^1\) found that the public is generally satisfied with the UK’s infrastructure and – in this context – new projects are seen as ‘nice to have’ rather than necessary. Building on their work, we wanted to understand whether this is true of all infrastructure, or if views vary according to specific types.

The focus groups demonstrated that the public is very positive about the state of the country’s sporting and music stadiums, as well as airports. In contrast, they are much less positive towards other types of infrastructure, including flood defences and the railways.

“Our sporting facilities nationally are second to none, among the best in the world.”
M, Bristol

“We’re never far from an airport, and our experience has been good.”
M, Kenilworth

\(^1\) Building Trust – Making the Public Case for Infrastructure. CBI, April 2014
Just as the CBI research found, views towards infrastructure are driven by direct use or experience – many participants did not have a view about things like power stations, national grid, or ports.

“[on the National Grid] It’s just that we’ve never had an experience of the grid failing us. Yeah we read that it’s ageing, but it still always works.”

M, Bristol

Views are also driven by recent events and media coverage of these – flood defences, for example, was frequently cited as an area in need of investment because of high profile flood events in recent years.

“Given the publicity it received last year, we think flood defences must not be good enough.”

F, Stockport

These perceptions from the focus groups are confirmed by the quantitative survey which highlights that sports/music stadiums are highly rated (43% say they are ‘very good/among the best in Europe’), along with airports (36%). By contrast, over half (54%) rate the railways as ‘ageing/not good enough’, while a similar proportion (51%) say the same of flood defences. Sizeable proportions of around two in five also rate energy generation/power stations and motorways/major A roads as ‘not great’ (38% and 37%, respectively). Figure 1 shows these results graphically.

Perceptions need to be addressed with evidence so that conclusions about future infrastructure priorities are accurate and should be a key priority for the National Infrastructure Commission.

<table>
<thead>
<tr>
<th>Question: Thinking about the nation’s major infrastructure, how would you rate each of the following in terms of their current condition?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base: 2,000 GB adults aged 18+, June 2015</td>
</tr>
<tr>
<td><strong>Sports/music stadiums</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>43%</td>
</tr>
<tr>
<td><strong>Airports</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>36%</td>
</tr>
<tr>
<td><strong>Energy distribution (the national grid)</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>18%</td>
</tr>
<tr>
<td><strong>Ports</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>17%</td>
</tr>
<tr>
<td><strong>Recycling/waste processing plants (e.g. materials recovery facilities, energy from waste plants)</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>14%</td>
</tr>
<tr>
<td><strong>Motorways / major A roads</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>12%</td>
</tr>
<tr>
<td><strong>Energy generation / power stations</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>10%</td>
</tr>
<tr>
<td><strong>Railways</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>9%</td>
</tr>
<tr>
<td><strong>Flood defences</strong></td>
</tr>
<tr>
<td>Very good / among the best in Europe</td>
</tr>
<tr>
<td>5%</td>
</tr>
</tbody>
</table>
Priority issues for investment

This section turns to look at what the public think should be prioritised for investment. Questions were asked separately to explore both national and local infrastructure.

National infrastructure priorities

The public identify two infrastructure priorities for the country (Figure 2): Renewable energy (chosen by 43%) and building more homes (39%). These are followed by a second tier of four infrastructure types – recycling and waste processing plants (32%), the railways (31%), flood defences (30%) and motorways/major A roads (28%). Lower order priorities, by contrast, include airports (8%), coal and gas power stations (8%), ports (3%) and sports/music stadiums (3%).

Looking at the priorities of different sub-groups within the population, the research demonstrates that renewable energy enjoys support across the political spectrum – with Conservative voters as likely to prioritise renewables as their Labour and Liberal Democrat counterparts (41%, 43% and 47%, respectively). Only among UKIP voters is renewable energy given a lower priority (and even then 29% still back it). There is also a trend according to age – with those aged 18-55 more likely to prioritise renewable energy than those aged 55+ (47% vs. 37%, respectively).

Turning to building more homes, there is a notable urban - rural divide, with 46% of those living in cities prioritising this infrastructure investment compared to 33% of those living in villages. There is also a political angle, with Labour and Liberal Democrat voters more likely to prioritise housing (47% and 42%, respectively), in contrast to UKIP and Green voters (31% and 27%, respectively). Conservative voters are in the middle, with 35% prioritising house building.
Local infrastructure priorities

A wide range of infrastructure priorities are identified at the local level (Figure 3). Investment in local transport infrastructure is a top priority (with 42% citing local roads and 36% citing public transport), followed by public buildings such as schools and hospitals (31%) and housing – either social housing (30%) or housing for private ownership (16%). Green/open spaces and high speed broadband are also prioritised by sizeable proportions (22% and 21%, respectively).

**Figure 3 – Local infrastructure priorities**

**Question:** Now thinking about infrastructure in your city/town/village, which of the following would be your investment priorities? Either in terms of improving the existing infrastructure or adding new infrastructure. (Respondents could select up to 5 – with the top 15 (out of 24 choices) shown here)

Base: 2,000 GB adults aged 18+, June 2015

<table>
<thead>
<tr>
<th>Priority</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roads</td>
<td>42%</td>
</tr>
<tr>
<td>Public transport</td>
<td>36%</td>
</tr>
<tr>
<td>Public buildings (e.g. schools, hospitals)</td>
<td>31%</td>
</tr>
<tr>
<td>Social housing</td>
<td>30%</td>
</tr>
<tr>
<td>Green / open spaces</td>
<td>22%</td>
</tr>
<tr>
<td>High speed broadband cabling</td>
<td>21%</td>
</tr>
<tr>
<td>Housing (private ownership)</td>
<td>16%</td>
</tr>
<tr>
<td>Railways / stations</td>
<td>16%</td>
</tr>
<tr>
<td>Drain/sewer network</td>
<td>15%</td>
</tr>
<tr>
<td>Cycling routes</td>
<td>15%</td>
</tr>
<tr>
<td>Pedestrian areas</td>
<td>14%</td>
</tr>
<tr>
<td>Community centres</td>
<td>13%</td>
</tr>
<tr>
<td>Shopping centres/malls</td>
<td>12%</td>
</tr>
<tr>
<td>Local sports facilities/pitches</td>
<td>10%</td>
</tr>
<tr>
<td>Leisure centres / gyms</td>
<td>9%</td>
</tr>
</tbody>
</table>

The research suggests that these priorities are largely common across the country. There is, however, an urban-rural divide with those living in rural areas much more likely to identify public transport (41% vs. 27% in cities) and high speed broadband (38% vs. 17% in cities) as key priority areas. While the research goes on to note that those in lower density areas are more concerned about development in their area in general, they are not anti-investment in infrastructure – but their perceived infrastructure preferences do differ in comparison to higher density urban areas.
Attitudes to future infrastructure

This section looks beyond the key investment priorities to explore some of the underpinning attitudes that will determine how the public feels about new infrastructure and whether they perceive it as a positive or negative development in their area.

An urban–rural divide: local identity

The focus groups highlighted a stark contrast between urban areas – where infrastructure is typically welcomed and accepted – and suburban/more rural areas where reactions are more cautious and highly dependent on the type of infrastructure. Here, there are concerns that infrastructure development (particularly housing) is changing the local identity of the area.

“There’s too much building going on – they’re trying to overdevelop us I think.”
F, Kenilworth

“This has always been a nice small town. And now, wherever there is a piece of land or nice bit of countryside, they seem to stick a property on it.”
F, Kenilworth

“Over the years it has spread its boundaries further and further. It’s almost like we’re going to meet the outskirts of Coventry and make one large conurbation. They call it progress but I’m not convinced.”
M, Kenilworth

The need for investment

Attitudes towards future infrastructure investment are guided by whether the public perceive a need for investment. In contrast to suburban and rural areas, the narratives and rationale for investment appear widely accepted in urban areas – particularly in London.

“We’re a 21st century city living with Victorian infrastructure, so we need investment in infrastructure.”
M, London

“We’ve got major problems with housing. Any housing that’s going up is not for us. We need a massive investment.”
M, London

“We need investment to stop these problems (traffic, ageing power stations) getting worse and – hopefully – make them better.”
F, Stockport

Concern about timetable delays, ‘red tape’ and spiralling costs

A recurring theme in the focus group discussions was a concern about perceived ‘red tape’ that leads to delays and increased costs when the country tries to deliver major infrastructure.

“Other countries build so much faster because they haven’t got so much red tape. The arena has taken ages – it’s still taking ages!”
M, Bristol
“Once it’s built it is good. We get there in the end. But it seems to cost 20 times more than it should. There are just so many levels of bureaucracy and red tape. Things that should get done quickly take years to get done.”

M, Stockport

This is reflected in the survey findings (Figure 4), with an even divide between around one in three (35%) who say that the country is ‘very’ or ‘quite’ good at delivering major infrastructure to time and budget, a similar proportion (29%) who say that it is ‘average’ and one in four (25%) who says that it is ‘not very good’ or ‘poor’.

There are some interesting differences among sub-groups, with those living in London more likely to be positive – 45% say we’re ‘very’ or ‘fairly’ good compared to 32% in small/medium towns and the same proportion (32%) among those living in villages. Men are more positive than women (40% vs. 30%) and, of the political parties, Conservative voters are typically more positive (43%, compared to 37% of Labour and Liberal Democrat voters and 27% of UKIP voters).

Benefits – direct and indirect

A key factor underpinning attitudes towards future infrastructure is the degree to which people perceive a benefit from the investment – either to them personally in their communities (i.e. local, tangible improvements) and/or the benefits to Great Britain in terms of jobs and economic impact.

Focusing on personal benefits first, focus group participants in London were able to point to direct and personal benefits from recent investment in, for example, transport infrastructure. In contrast, attitudes to HS2 in Kenilworth were more negative because of the perceived lack of direct benefit to the area.
“The Overground has got loads better. It was a hassle last year when they were extending the platforms - but now there are 5 carriages rather than 4 and I can sit down. So for 12 months hassle you can have years of better service.”

M, London

“We won’t even be able to get on it [HS2]. We’d have to go to Birmingham first.”

F, Kenilworth

Perceived benefit to the country is also very important, and the focus groups suggest differing opinions – from those who perceive an economic boost through to those who are concerned that the UK does not reap enough of the economic benefit because of the reliance, in their view, on foreign companies and labour.

“The news is filled with stories about us outsourcing all our construction to foreign companies and countries. It would be good to hear about our engineering success stories and UK companies leading the way.”

M, Stockport

“If you build a motorway and a German company does it then the money all goes there. We should buy our own equipment and from our own workforce – because the money will circulate here and help to build up our economy.”

M, Kenilworth

This is reflected in the survey findings, which highlight a clear divide between around two in five (42%) who think that the UK is an engineering country capable of delivering world class major infrastructure projects and a similar proportion (44%) who thinks that we used be an engineering country, but not any more (Figure 5).

**Figure 5 – the UK’s engineering capability**

<table>
<thead>
<tr>
<th>Question: Which of the following statements about the country’s engineering skills and capabilities best matches your own view?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base: 2,000 GB adults aged 18+, June 2015</td>
</tr>
</tbody>
</table>

- 42%: The UK is an engineering country capable of delivering world class major infrastructure projects
- 44%: The UK used to be an engineering country capable of delivering world class major infrastructure projects, but not anymore
- 3%: The UK has never been an engineering country capable of delivering world class major infrastructure projects
- 12%: Don't know
There is an interesting divide according to voting patterns, with Conservative voters at the May 2015 General Election more likely to take a positive view of the country’s engineering capability – 55% compared to 47% of Labour voters and 45% of Liberal Democrat voters. UKIP and Green party voters are the least positive – 35% and 37%, respectively, think that the UK is an engineering country capable of delivering world class infrastructure projects.

**The balance of power**

The research points to some unresolved tensions. On the one hand, there is a desire for more infrastructure spending, quicker decisions and less ‘red tape’ in respect of delivery. On the other, the public are concerned that the balance of power favours developers over local communities and environmental safeguards.

For example, almost half (49%) think that there are not enough safeguards to protect the country’s countryside and natural habitats, compared to just 6% who think there are too many (Figure 6). Furthermore, on the balance of power between developers and local communities, almost three in five (58%) think it is too much in favour of developers’ plans over the wishes of communities, compared to 6% who think the reverse (Figure 7). Both of these perspectives are commonly and consistently held across the public with little variation across sub-groups.

![Figure 6 – Concerns about over-development and environmental safeguards](chart)

**Question:** Which of the following statements best matches your own view?

*Base: 2,000 GB adults aged 18+, June 2015*

- 49%: There are not enough safeguards to protect the country’s countryside and natural habitats
- 34%: There are too many safeguards to protect the country’s countryside and natural habitats
- 6%: There are the right level of safeguards to protect the country’s countryside and natural habitats
- 11%: Don’t know
Figure 7 – Perceptions of the balance of power between communities and developers

Question: Which of the following statements best matches your own view?
Base: 2,000 GB adults aged 18+, June 2015

- The balance of power is too much in favour of developers’ plans over the wishes of communities (58%)
- There is a good balance between developers’ plans and the wishes of communities (23%)
- The balance of power is too much in favour of communities over developers’ plans (13%)
- Don’t know (6%)
Delivering future infrastructure: Building confidence

This section of the report turns to how the infrastructure priorities identified previously can be delivered on the ground. What factors will determine the public reaction, and what represents best practice for the industry?

The research highlights key issues that are critical to building confidence in future infrastructure investment set out in Figure 8. These are now discussed in turn.

<table>
<thead>
<tr>
<th>Engagement</th>
<th>Leadership and balancing need</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to build confidence in local infrastructure developments?</td>
<td>Demonstrating strategic and joined up thinking</td>
</tr>
</tbody>
</table>

### i) Developing a positive narrative

The public says they want to hear more about plans for the future. Focus group participants, for example, were surprised at how much infrastructure investment is already happening/planned when they were shown extracts from the National Infrastructure Plan (even though, without exception, none of the focus group participants had heard of this plan).

“In the news it doesn’t feel like this infrastructure investment is happening, it’s all about austerity and cuts. I want to hear more about this, it’s positive.”

M, Stockport

“There’s a lot going on [in the NIP]. More than I thought. It would be interesting to see if it all comes off.”

F, Bristol

There is a strong sense that Great Britain should be aspirational in its thinking about infrastructure and take more pride in its achievements.
“We held the Olympics. We’re leaders in building great infrastructure, right from the legacy of the railways and Isambard Brunel through to today. The standard of build we can do is phenomenal.”

M, Bristol

This is reflected in the survey results (Figure 9), with 85% of the public in favour of higher levels of investment to achieve either solid improvements to our infrastructure or world-class infrastructure (almost one in four – 23% – want to see the latter). By contrast, only around one in ten (11%) think that we should aim to just maintain the current standard with lower levels of investment, while just 4% think that we should not be focusing on infrastructure at the current time.

This marks a significant departure from the CBI’s research in 2014, which detected much less ambition among the public and an attitude that infrastructure upgrades are a ‘nice to have’ rather than a fundamental need.

Interestingly, 51% of men said investing in infrastructure should be a priority in a tough economic climate in order to boost the economy. By comparison only 33% of women agreed with the same statement.

The narrative needs to draw heavily from positive examples. These were readily identified in London (where participants were able to draw on any number of examples – Victoria, King’s Cross, Tottenham Court Road station), although less so in other locations. The comments below also effectively demonstrate the dichotomy of views with both positive and negative examples coming to mind easily.
“The tram system in Manchester has turned out to be a big positive. The Olympics were pretty good. Wembley overshot its budget by a lot. And the Millennium Dome sticks in the mind particularly as something that didn’t go well for a long time.”

M, Stockport

“Victoria was a complete dump and when it’s finished it will be amazing.”

F, London

“They built a bridge in London recently and it wobbled! If we can’t even build a bridge then how are we going to build a power station?”

F, Kenilworth

**ii) Demonstrating a strategic approach**

A recurring theme throughout the research was a perception that decisions about infrastructure are not joined up or coordinated (e.g. house building is approved without thinking of the wider infrastructure that is needed to support it). Participants praised positive examples (e.g. Manchester tram system), but these were seen as the exception rather than the norm.

“The tram system is great, done in collaboration by the 10 councils – it’s an amazing testament to them.”

F, Stockport

“They’re always digging up a road. As soon as they’ve finished one, they start another. It’s never finished, it’s a continual state of works.”

M, London

“They seem to take decisions without thinking it through. Like ‘let’s build Southmead Hospital’ but then they forget about parking.”

F, Bristol

This is reinforced by the survey results which highlight that only 6% think that infrastructure projects in their area are very well coordinated/part of a strategic plan, and a further 33% think they are ‘somewhat coordinated’ (Figure 10). In contrast, approaching half (45%) think that infrastructure projects are ‘somewhat poorly’ or ‘very poorly’ coordinated.

There is a stark divide between rural and urban areas. The former are least likely to think that infrastructure projects in their area are coordinated – only 30% in villages and 33% in small/medium towns think they are very or somewhat well coordinated. In contrast, 59% in a city centre think the same, falling back to 43% in city suburbs. There is also a difference between London (54%) and the Northern Powerhouse cities (45%).
There was also a strong sense in the focus groups that those developing infrastructure do not look far enough ahead in time to future-proof the spend and make sure they deliver benefits (rather than maintains the status quo).

“Using the M6 as an example, they’re never not doing something with it. Maybe if they planned 20 years ahead they’d get everything done the first time rather than this constant state of repair.”

M, Stockport

iii) Engagement
Community engagement – as early in the process is possible – is identified by the research as one of the key measures to build confidence in future infrastructure. For example, when asked what would make them more confident about the process of delivering local/regional infrastructure, just over two in five (41%) cite ‘community engagement to discuss local infrastructure needs’ and a further 30% ‘a consultation on all significant infrastructure projects’ (Figure 11).
Furthermore, the research demonstrates that the public is clearly interested in the subject of infrastructure and what it means for them in their area (Figure 12). Around one in six (18%) say that they would be ‘very interested’ to be involved in discussions about the infrastructure needs in their area, whereas almost half (49%) say they would be ‘fairly interested’\(^2\). By contrast, one in three (33%) say they are not interested.

Direct mail/letters remain an important way of keeping residents informed about infrastructure projects in their area (cited by 47%), followed by articles in local newspapers (41%) and a specific project website (38%). Social media is cited by around one in five (21%) overall, although this is a much more prominent preferred source of information among those aged 18-34 (37%). A minority of one in ten (10%) are not interested in being kept informed.

\(^2\) In our experience the ‘very interested’ category is a more accurate predictor of those who are likely to engage formally in local discussions and consultation exercises, whereas the more passive ‘fairly interested’ category tends to reflect those who are interested to hear about developments and plans locally but who may not want to engage in formal discussions.
iv) Leadership and balancing need

Participants in the focus groups felt that there is a pressing need for leadership on infrastructure, and were often frustrated by the apparent timidity to take important decisions for the local area and for the country. Some spoke of the need for an ‘almost dictatorial approach’ to delivering national projects of importance, while others felt that the British approach suffers from trying to ‘please everyone all of the time’.

“We seem to kick these things around as a nation without getting anywhere. We say ‘let’s put wind farms out to sea’ but people complain. So you say ‘let’s put them in land’ and other people say they don’t want them there either.”

M, Bristol

“The planning system is there for a reason – we’ve got heritage and communities to protect. There’s health and safety, and we build higher quality. It’s not fair to compare how fast we build to China and India. But still, you can’t please everyone all the time - which is what we sometimes try to do.”

M, London

“Just do it. Get it done. End of.”

M, Bristol

As well as a demand for more political leadership, participants were very supportive of the involvement of technical experts such as architects and engineers – which many participants felt would increase public confidence and ensure that long-term decisions could be taken.
“I don’t think that decisions about infrastructure should be made by politicians. They should be made by an independent body of experts – architects, engineers and the like.”

M, Bristol

“We elected the Mayor and the Assembly – they should deliver this, guided by a panel of non-political technical experts.”

M, London

Figure 11 (above) shows that 25% and 24% of the public, respectively, cited more leadership from politicians and technical experts as things that would increase their confidence in the process of delivering infrastructure projects.

In terms of balancing competing interests and needs, the focus group participants tended to feel that the national need should take priority – assuming there is a compelling need for the infrastructure and that fair compensation schemes and community incentives are in place (these two conditions are very important in underpinning support).

“[On HS2] You can’t buy a home and then 20 years down the line hold the country to ransom. I can understand why they’d be annoyed, but if it’s in the national interest and a compensation scheme is in place, then you have to adapt to change.”

M, Bristol

The research also detects a noticeable perception that London benefits disproportionately from new investment – a view that Londoners themselves appear to reject.

“I know London is the capital but it seems like they get everything and we don’t get that much.”

M, Bristol

“I think London gets a bad rap from the rest of the UK who complain that it’s getting all the money. But it’s not true, because billions of pounds leaves London to subsidise other areas. I like the idea of keeping the tax raised here to spend in London.”

M, London
Methodology

The research was carried out by Icaro. A mixed-methods approach was selected to provide both in-depth qualitative insights alongside the statistical robustness and surety of a large, nationally representative sample.

Qualitative

Four focus groups were conducted in May 2015 – in London, Bristol, Kenilworth and Stockport. Each group involved eight participants (32 in total), with participants selected to represent a broad cross-section of the British population according to age, gender, work status and voting pattern in the May 2015 election. Groups were 1.5 hours long and participants received a £40 ‘thank you’ for their time.

Quantitative

Based on the insights gained from the focus groups, a survey was designed and undertaken with a sample of 2,000 adults aged 18+ in Great Britain. Fieldwork took place from the 9 – 17 June 2015.

Quotas were set on age, gender, region and work status to ensure that the sample matches the known profile of the British population.

An additional 500 interviews were undertaken in cities as part of an urban boost (including London, Bristol, Cardiff and the ‘Northern Powerhouse’ cities of Leeds, Liverpool, Manchester, Sheffield, Hull and Newcastle). This provides a robust overall data set for the country as a whole, as well as the means to undertake detailed analyses on groups within the population (e.g. urban vs. rural, older vs. younger adults, Conservative voters in May 2015 vs. Labour voters, and so on).

Interpreting the data

All results are subject to margins of error - a sample has been surveyed (not the entire population). The approximate sampling tolerances applicable to percentages (at the 95% confidence level) are as follows:

<table>
<thead>
<tr>
<th>Results close to</th>
<th>Overall GB results (2,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10% or 90%</td>
<td>±1</td>
</tr>
<tr>
<td>30% or 70%</td>
<td>±2</td>
</tr>
<tr>
<td>50%</td>
<td>±2</td>
</tr>
</tbody>
</table>

Sampling tolerances are also involved in the comparison of results between sub-groups in the population. A difference must be of at least a certain size to be statistically significant:

<table>
<thead>
<tr>
<th>Results close to</th>
<th>City centre (388) vs. village (424)</th>
<th>England (1,720) vs. Scotland (180)</th>
<th>18-34 (600) vs 65+ (400)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10% or 90%</td>
<td>±5</td>
<td>±6</td>
<td>±4</td>
</tr>
<tr>
<td>30% or 70%</td>
<td>±7</td>
<td>±8</td>
<td>±6</td>
</tr>
<tr>
<td>50%</td>
<td>±7</td>
<td>±8</td>
<td>±7</td>
</tr>
</tbody>
</table>
Conclusions

- The word ‘infrastructure’ is readily understood, even if there is a tendency to focus on visible and directly accessed forms of infrastructure (e.g. transport networks) at the expense of ‘hidden’ infrastructure (e.g. energy generation and supply).

- There is high awareness and recognition of the role that infrastructure plays in towns and cities, particularly in urban areas (such as London) with experience of recent investment and development.

- Views of the country’s existing infrastructure vary from the positive (sporting and music venues, airports) to negative (motorways and A roads, railways, flood defences). Views are largely dictated by direct experience and by recent high profile events (e.g. floods).

- Renewable energy and building more homes are the British public’s top two infrastructure priorities for investment – cited by 45% and 39%, respectively. Support for investment in renewable energy is as strong among those who voted Conservative in the May 2015 election as among Labour and Liberal Democrat voters (by contrast, it is highest among Green voters and lowest among UKIP voters). These priorities are followed by recycling and waste processing facilities (32%), railways (31%), flood defences (30%) and motorways/A roads (28%).

- Key local investment priorities include local roads and public transport (cited by 42% and 36%, respectively). Housing is also prominent, with 30% citing investment in social housing and 16% in housing for private ownership. Those living in rural areas are much more likely to prioritise public transport and high speed broadband.

- There is a notable divide between urban areas – where infrastructure is typically welcomed – and suburban/more rural areas where there are concerns about overdevelopment and how infrastructure development (particularly housing) is changing the local identity of the area.

- Three other issues also frame how the public respond to potential investment in infrastructure – concerns about ‘red-tape’ and things taking longer/more money to compete, whether they will benefit personally (i.e. through tangible improvements in their area) and whether they believe the country as a whole will benefit in terms of jobs and economic impact.
Recommendations

The research leads to five recommendations for Government, the newly formed National Infrastructure Commission and industry:

1. **Develop a positive narrative** – the public want to hear about future investment in infrastructure and consider it a positive counterbalance to news on austerity. Examples of recent projects are very powerful – positive examples (e.g. the Olympics) build confidence; negative examples do the reverse. There is a strong sense that the UK should be aspirational in its thinking about infrastructure – close to one in four (23%) think it should be aiming for ‘world-class’ infrastructure with high levels of investment, while a further 62% think we should be aiming for solid improvements even if it involves higher levels of investment than at present.

2. **Demonstrate a strategic approach** – there is a common perception that decisions about infrastructure are not joined up or coordinated. The public is ready to praise positive examples (e.g. Manchester tram system), but these are seen as the exception rather than the norm. The National Infrastructure Commission is well placed to explain the benefits of infrastructure but it is much more than that. It can take a joined up approach to infrastructure (including housing) and provide evidence about the benefits as a way of improving the quality of the engagement and consensus building.

3. **Engage** – two in three (67%) are interested in being involved in discussions about the future infrastructure needs of their area/region. Furthermore, British people say that community engagement (41%) and consultation (30%) would increase their confidence in local decisions about infrastructure (particularly if the engagement is early on and can affect change). The focus groups suggest that early engagement is critical to building confidence and avoiding a sense that decisions are already ‘a done deal’ with no scope for people to have a say.

   Infrastructure must be about delivering projects for people and with people, not to people. Meaningful engagement and consultation can increase public acceptance of infrastructure. There is negligible support for engaging and consulting less.

4. **Lead** – the public think there is a pressing need for leadership on infrastructure, both locally and nationally. There is a frustration, summed up by a quote in the focus groups, that ‘we seem to kick these things around as a nation without getting anywhere’. There is also strong backing for input from technical experts which would increase public confidence that long term decisions about infrastructure are taken in the public interest. The National Infrastructure Commission is well placed to address this.

5. **Demonstrate balance** – the research points to an unresolved tension between the national need and safeguards to protect communities and the environment. On the one hand, the public are concerned that the balance of power favours developers over local communities and environmental protection. On the other, there is a desire for less red tape and quicker delivery. The research also detects a noticeable perception that London benefits disproportionately from new investment – a view that Londoners reject.