

GLOBAL INFRASTRUCTURE INDEX 2024

32 country study, 24 May – 7 June 2024

Global Summary

In partnership with:



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Index 2024



SATISFACTION & ATTITUDES



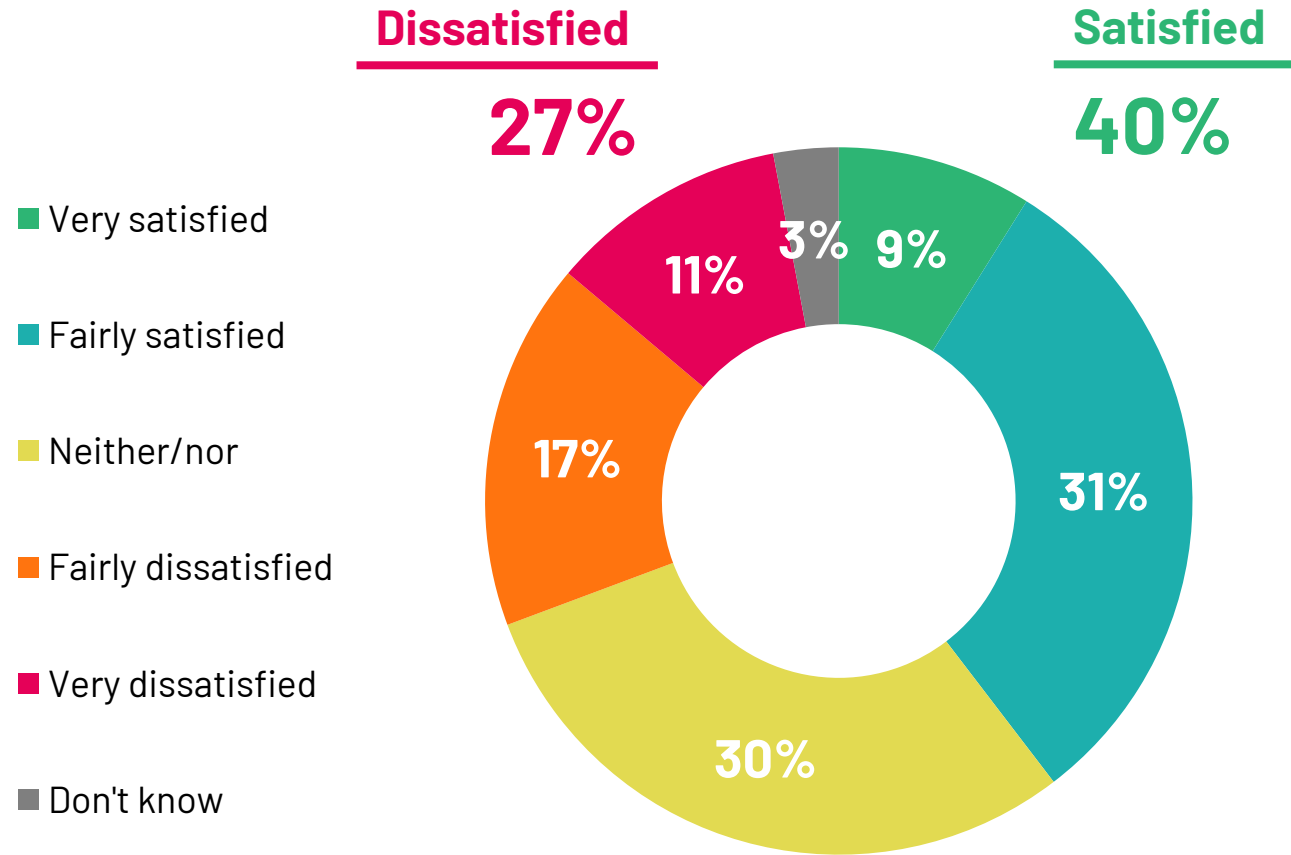
A higher proportion are satisfied with infrastructure than are not, but many are unsure

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?

Base: 23,530 adults (online), 32 countries
May-June 2024

Global Country Average*



* N.B. "The Global Country Average" reflects the average result for all the countries and markets in which the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. The number of countries involved has changed over time e.g. 26 in 2016, 32 in 2024

There is considerable variation in satisfaction across the 32 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.

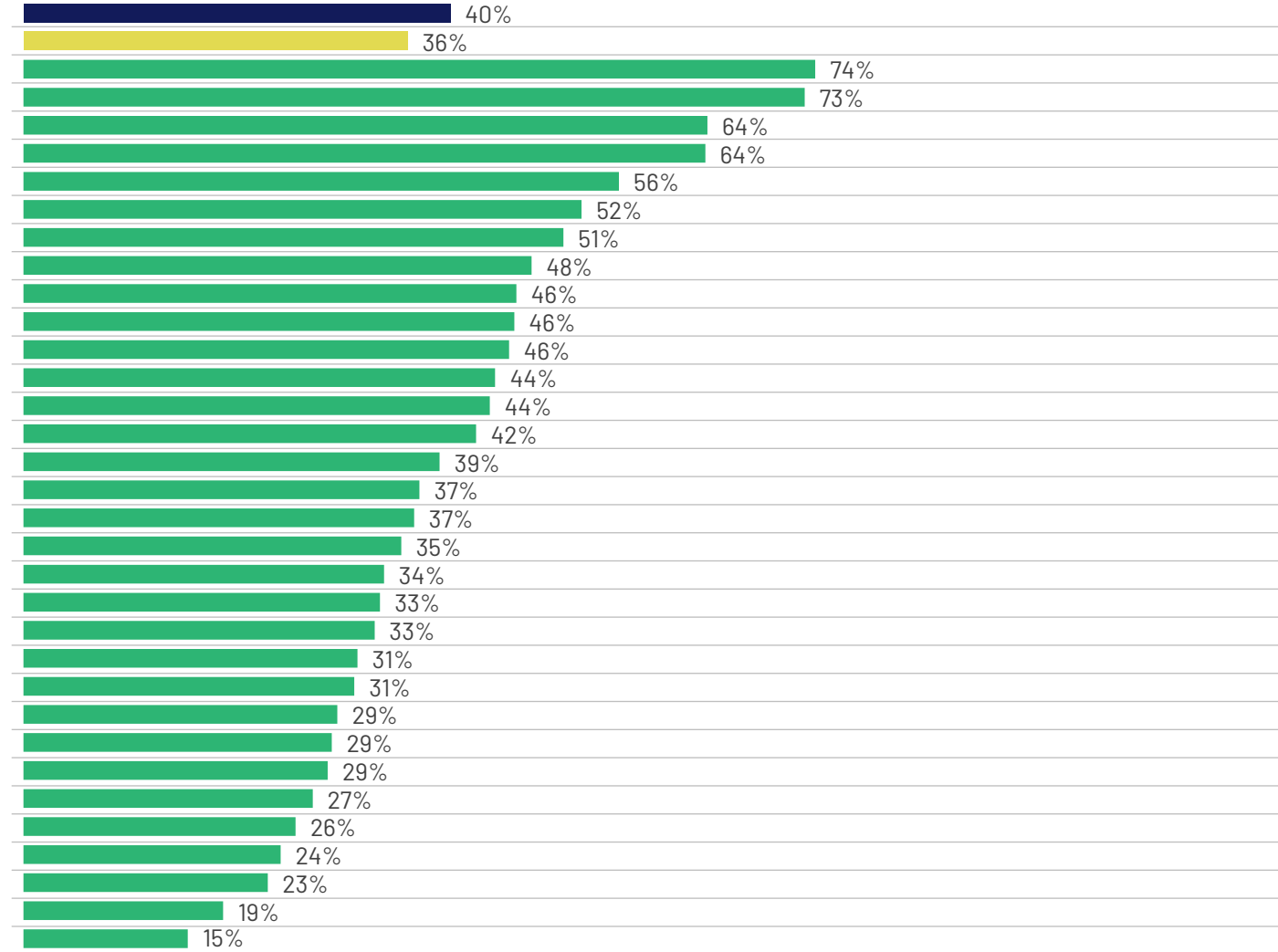
Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average
G7
Singapore
India
Netherlands
Indonesia
Thailand
Philippines
Malaysia
Mexico
Poland
Chile
France
Japan
Australia
South Korea
Ireland
Sweden
Great Britain
Germany
Colombia
United States
Spain
Belgium
Canada
Argentina
Brazil
Türkiye
New Zealand
South Africa
Peru
Italy
Hungary
Romania

% very/fairly satisfied



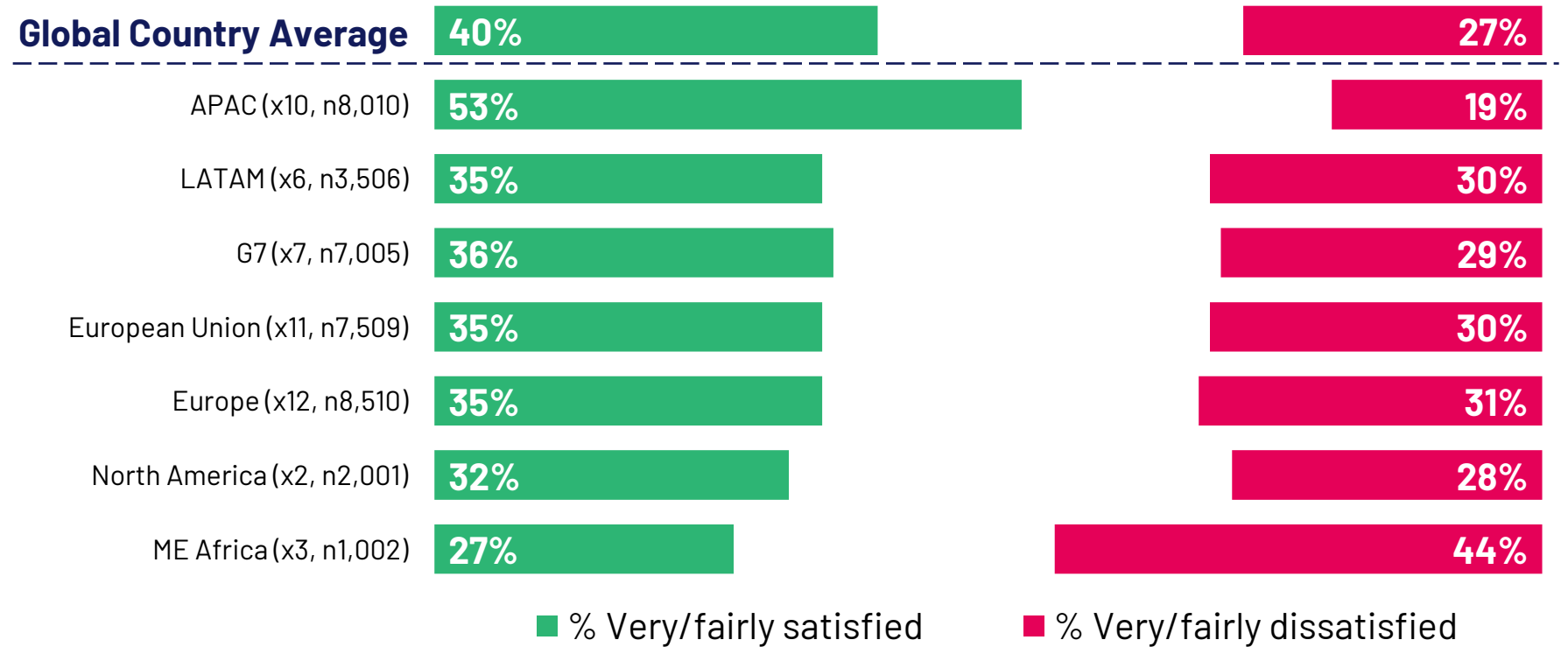
Satisfaction is relatively higher in APAC but similar elsewhere

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 **Appendix** for note on regional classifications. Number of countries and aggregate base size in each region shown in ().

Base: 23,530 adults (online), 32 countries
May-June 2024



Longer-term trends: Satisfaction dipped in 2018 but bounced back during early pandemic period then fell back to 2019 levels

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.

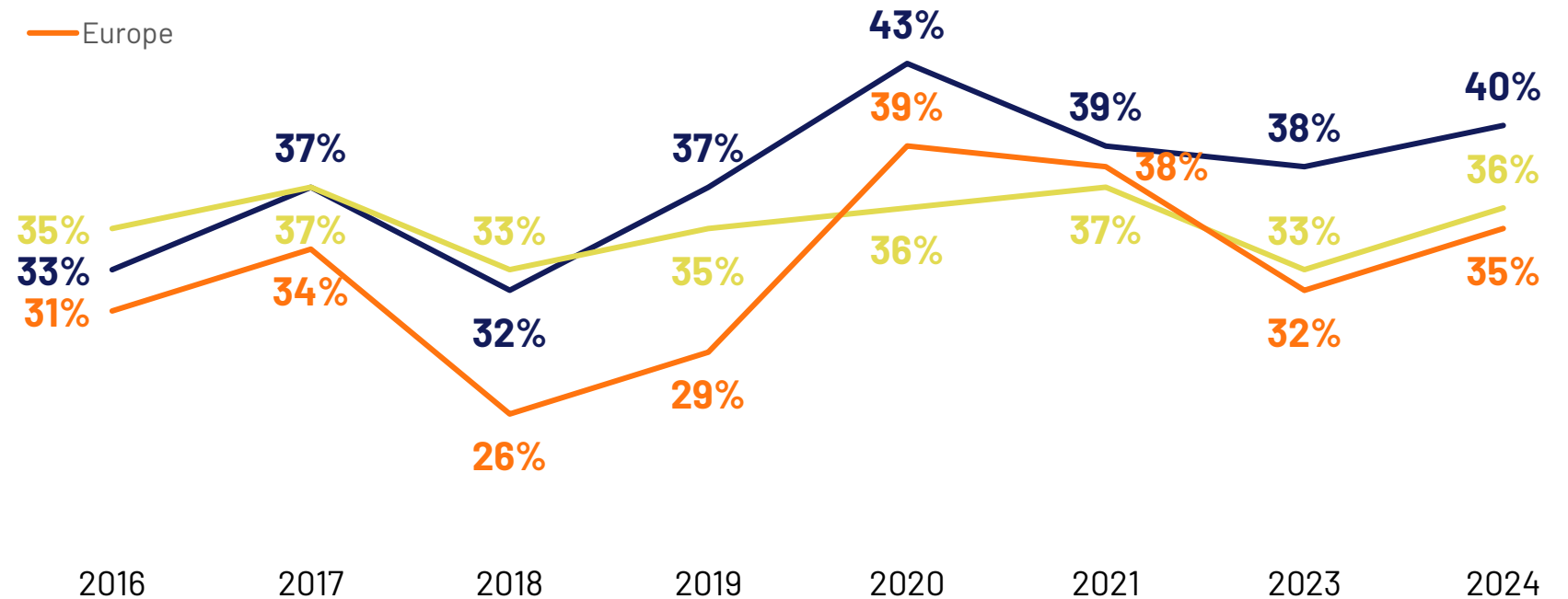
Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

Base: 23,530 adults (online), 32 countries
May-June 2024

Global Country Average

% very/fairly satisfied

— Global Country Average
— G7 (*G8 2016-21)
— Europe



There have been sharper rises in satisfaction in Britain and the U.S.

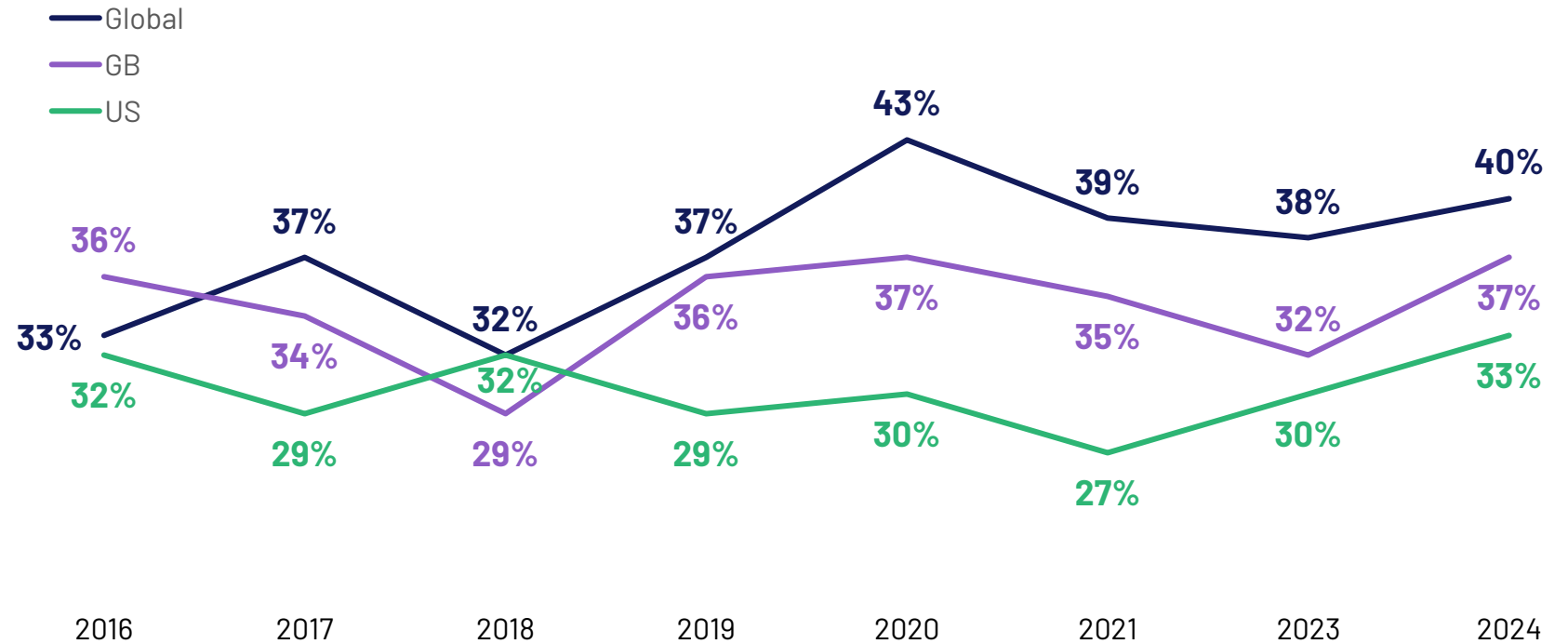
Q. We now want you to think about [COUNTRY'S] infrastructure. By infrastructure we mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

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

Base: 23,530 adults (online), 32 countries
May-June 2024

Global Country Average

% very/fairly satisfied



INFRASTRUCTURE SECTORS



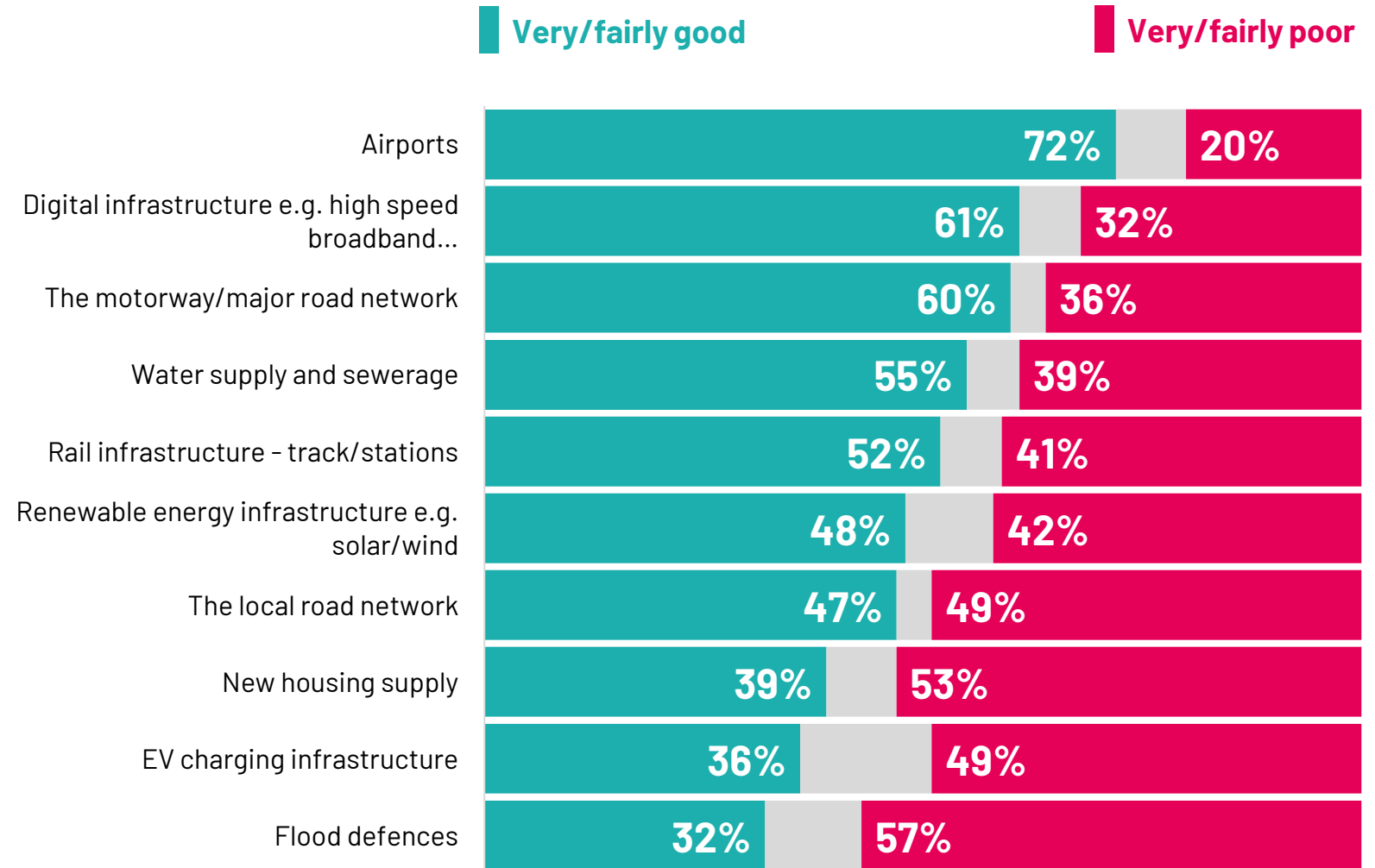
There is variation in how different sectors are seen

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]...

Base: 23,530 adults (online), 32 countries
May-June 2024

Global Country Average*



Ratings - Airports

Q. These next questions are about different types of infrastructure.

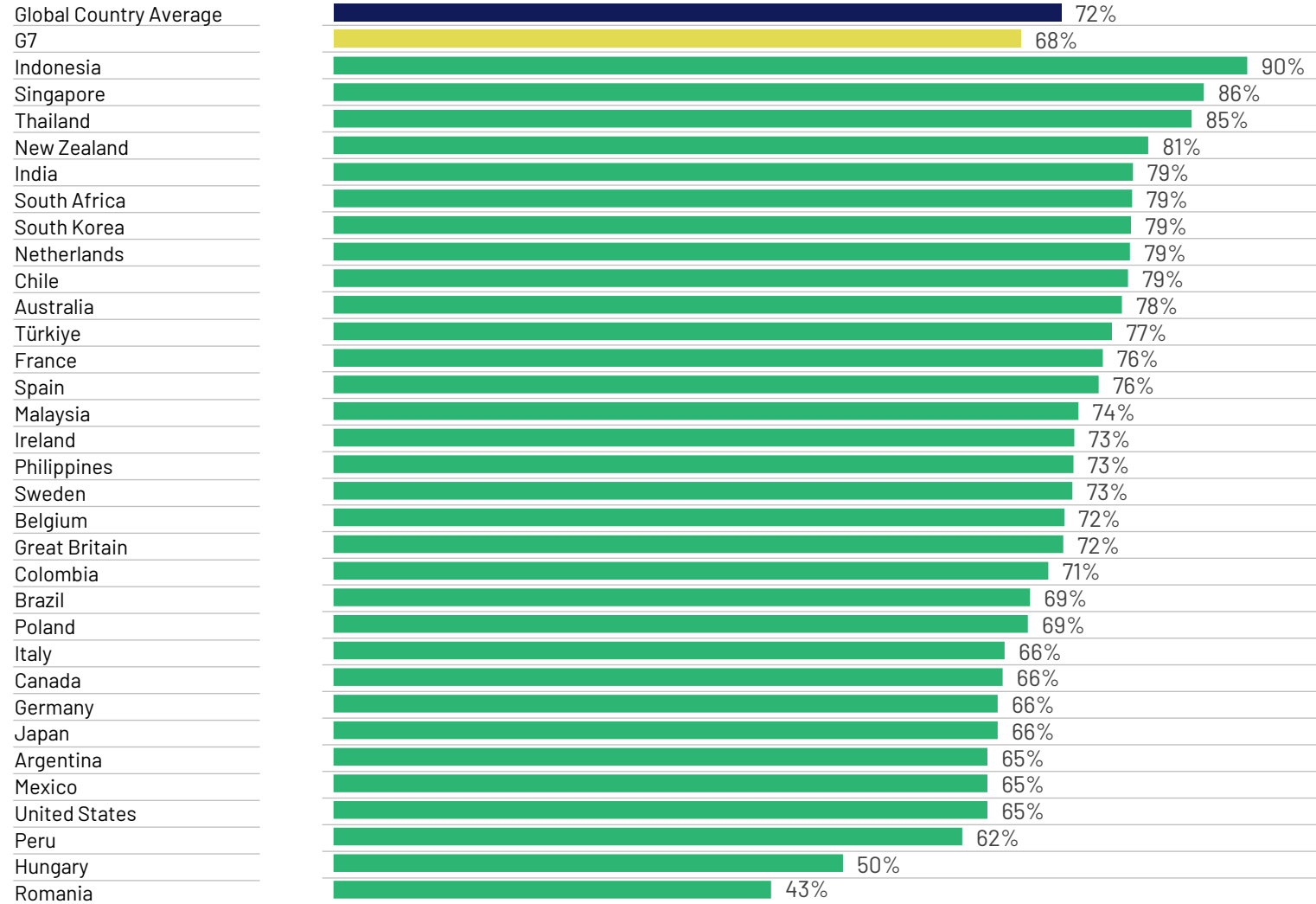
Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Airports

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

% very/fairly good



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]...

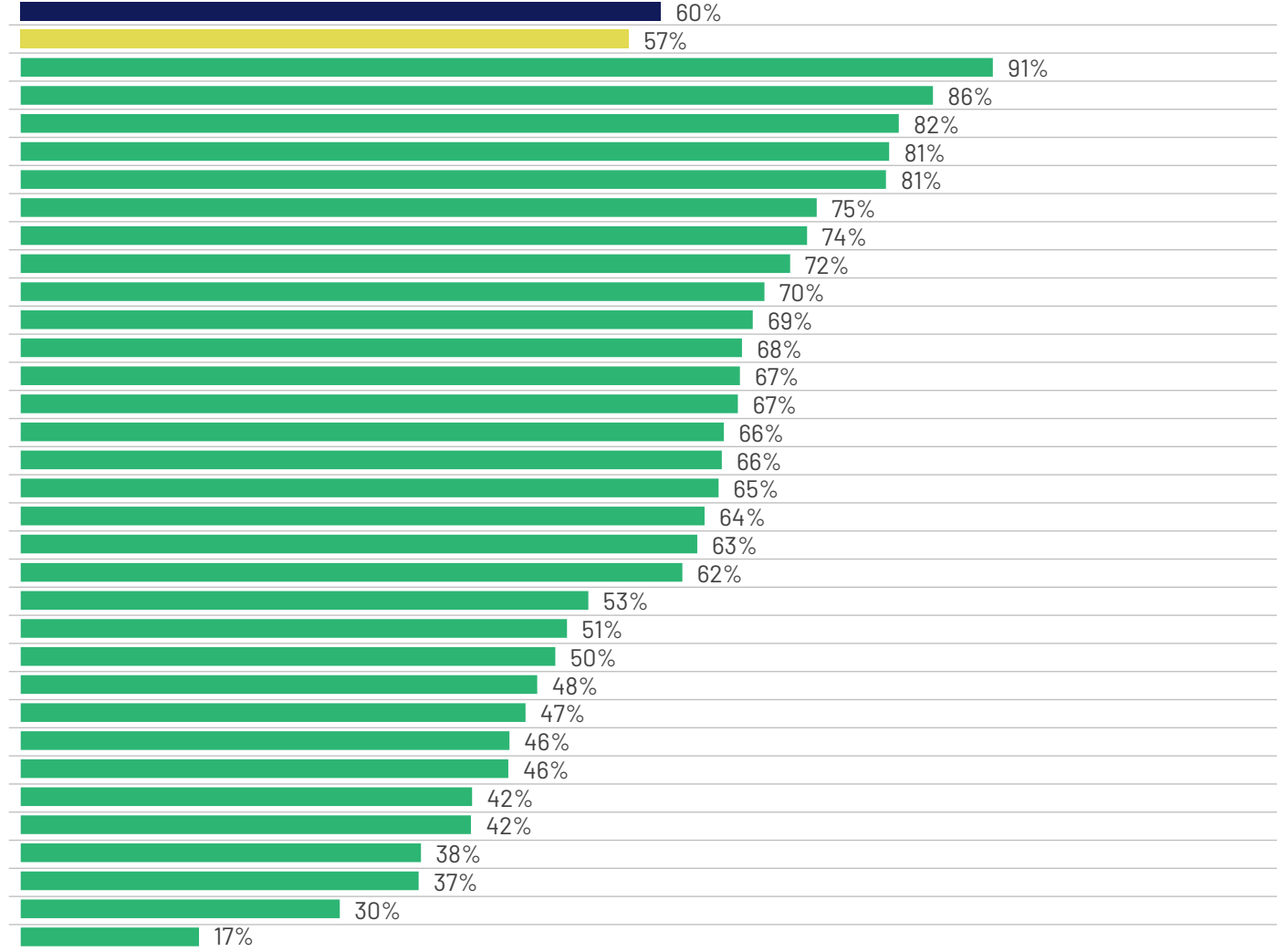
The motorway/major road network

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average
G7
Indonesia
Singapore
Netherlands
Thailand
South Korea
India
Türkiye
Philippines
Ireland
Spain
France
Sweden
Chile
Japan
Poland
Malaysia
Germany
Australia
Great Britain
Mexico
South Africa
New Zealand
Italy
United States
Canada
Brazil
Hungary
Argentina
Belgium
Colombia
Peru
Romania

% very/fairly good



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]...

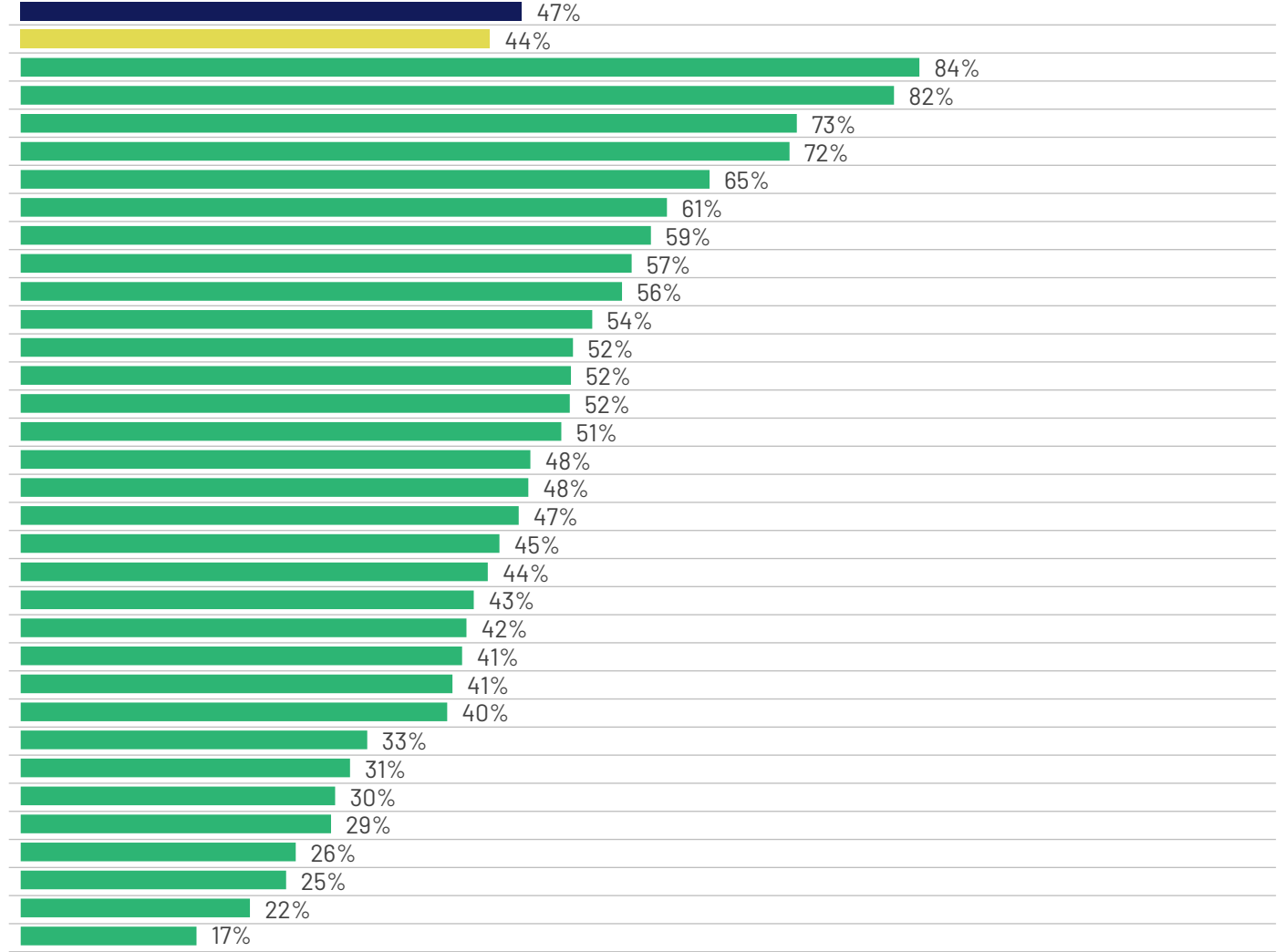
The local road network

Base: 23,530 adults (online), 33 countries
May-June, 2024

Country

Global Country Average
G7
Singapore
Netherlands
South Korea
India
Indonesia
Thailand
Türkiye
Philippines
Australia
Malaysia
France
Germany
Poland
Japan
Spain
Chile
Sweden
United States
Great Britain
Ireland
Mexico
Canada
New Zealand
Brazil
South Africa
Belgium
Romania
Argentina
Italy
Colombia
Peru
Hungary

% very/fairly good



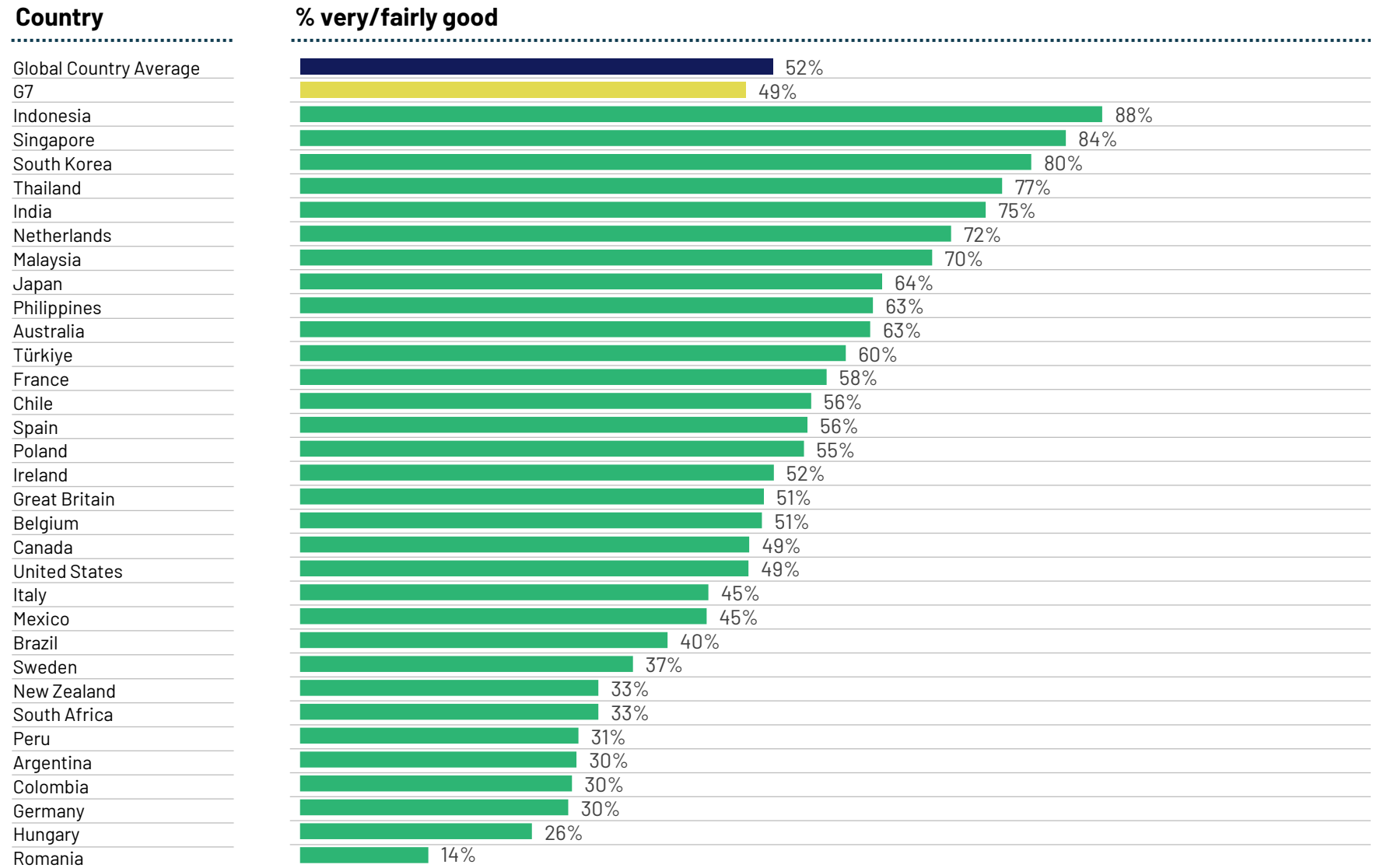
Ratings – Rail infrastructure

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

Base: 23,530 adults (online), 32 countries
May-June 2024



Ratings – New housing supply

Q. These next questions are about different types of infrastructure.

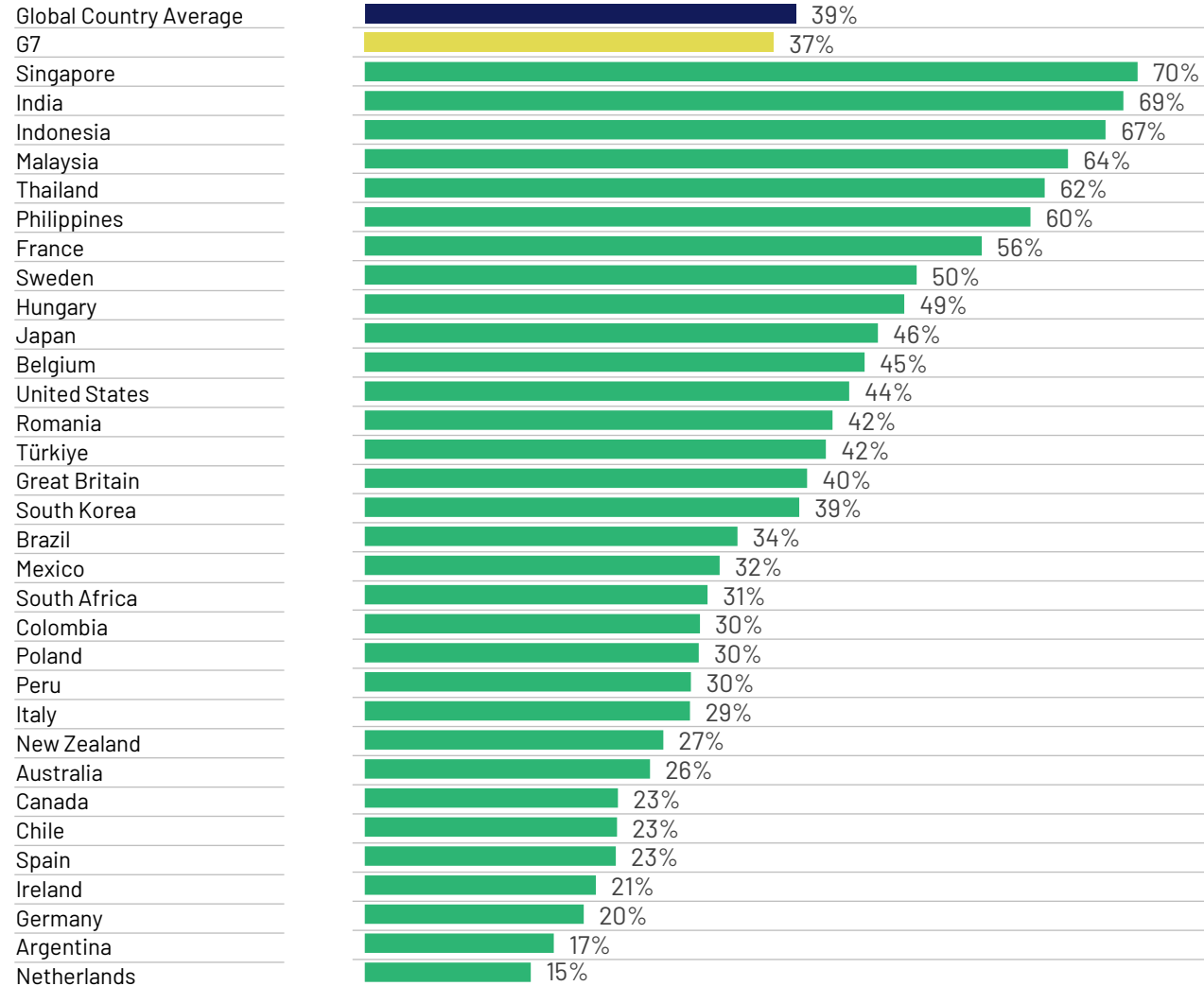
Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

New housing supply

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

% very/fairly good



Ratings – Flood defences

Q. These next questions are about different types of infrastructure.

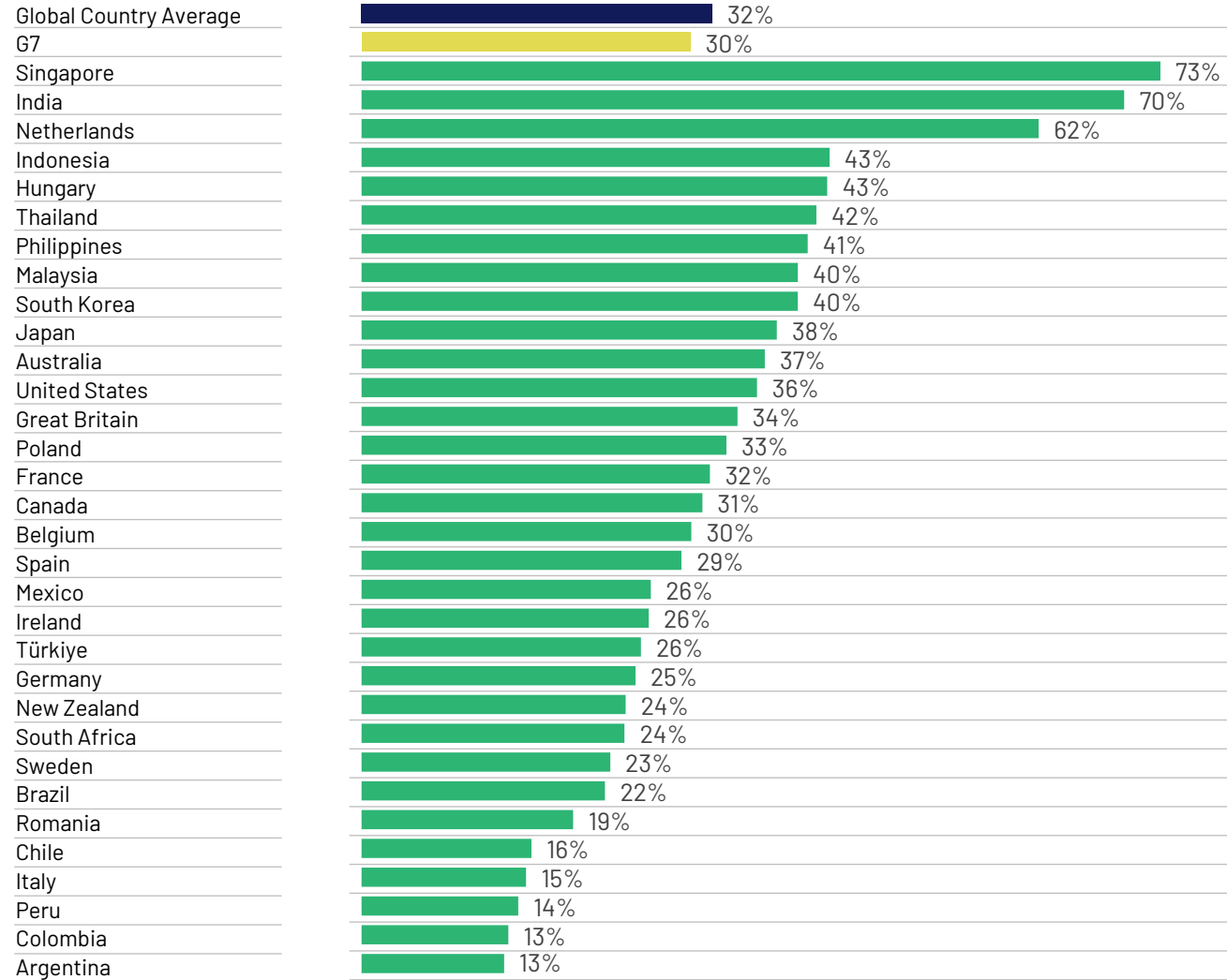
Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Flood defences

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

% very/fairly good



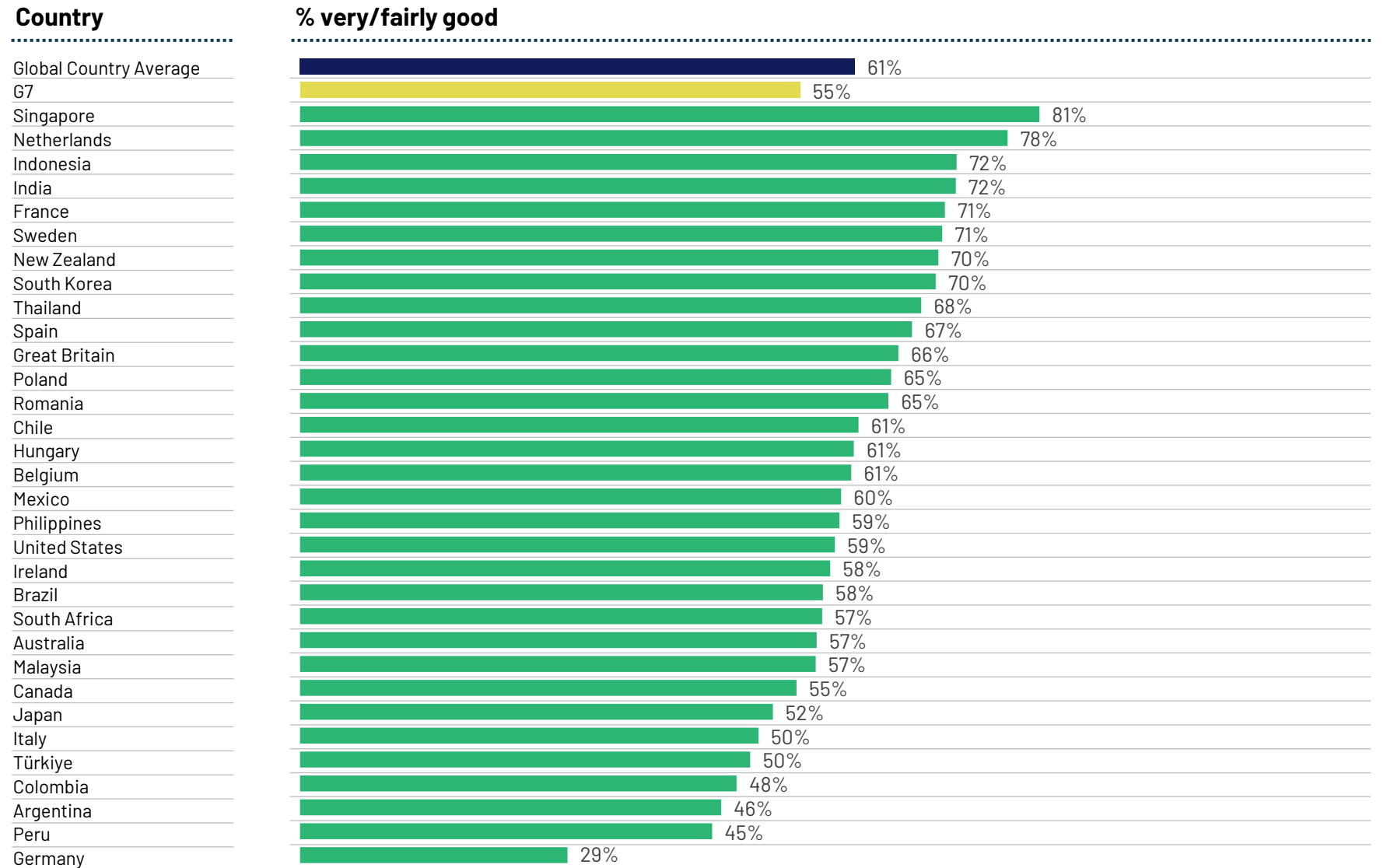
Ratings – Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G

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

Base: 23,530 adults (online), 32 countries
May-June 2024



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]...

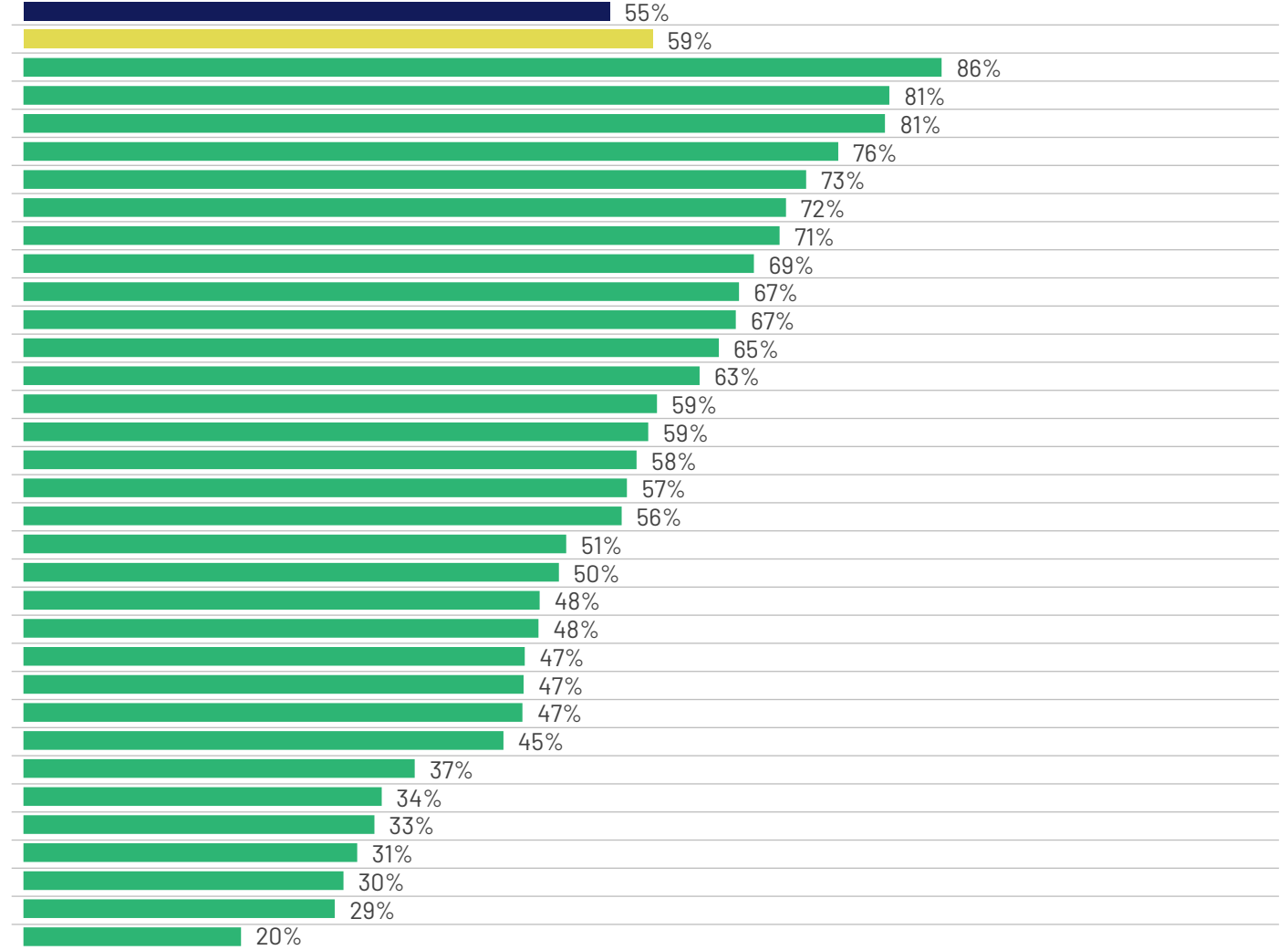
Water supply/sewerage

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average
G7
Singapore
Netherlands
Australia
Germany
France
South Korea
India
Canada
Belgium
Spain
Sweden
Poland
Japan
Indonesia
United States
Malaysia
New Zealand
Hungary
Ireland
Romania
Philippines
Türkiye
Thailand
Great Britain
Brazil
Chile
Italy
Colombia
South Africa
Argentina
Mexico
Peru

% very/fairly good



Ratings – Renewable energy infrastructure e.g. solar and wind energy

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

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average

G7

Singapore

India

Philippines

Netherlands

Indonesia

Thailand

Belgium

France

Spain

Australia

Malaysia

Sweden

Türkiye

New Zealand

Ireland

Great Britain

Brazil

United States

Chile

Germany

Canada

Poland

Romania

South Korea

Hungary

Italy

Mexico

Japan

South Africa

Colombia

Peru

Argentina

% very/fairly good

48%

44%

71%

69%

66%

66%

63%

62%

59%

56%

54%

53%

53%

53%

53%

49%

49%

48%

48%

47%

47%

44%

43%

42%

37%

37%

36%

36%

35%

34%

33%

32%

30%

29%

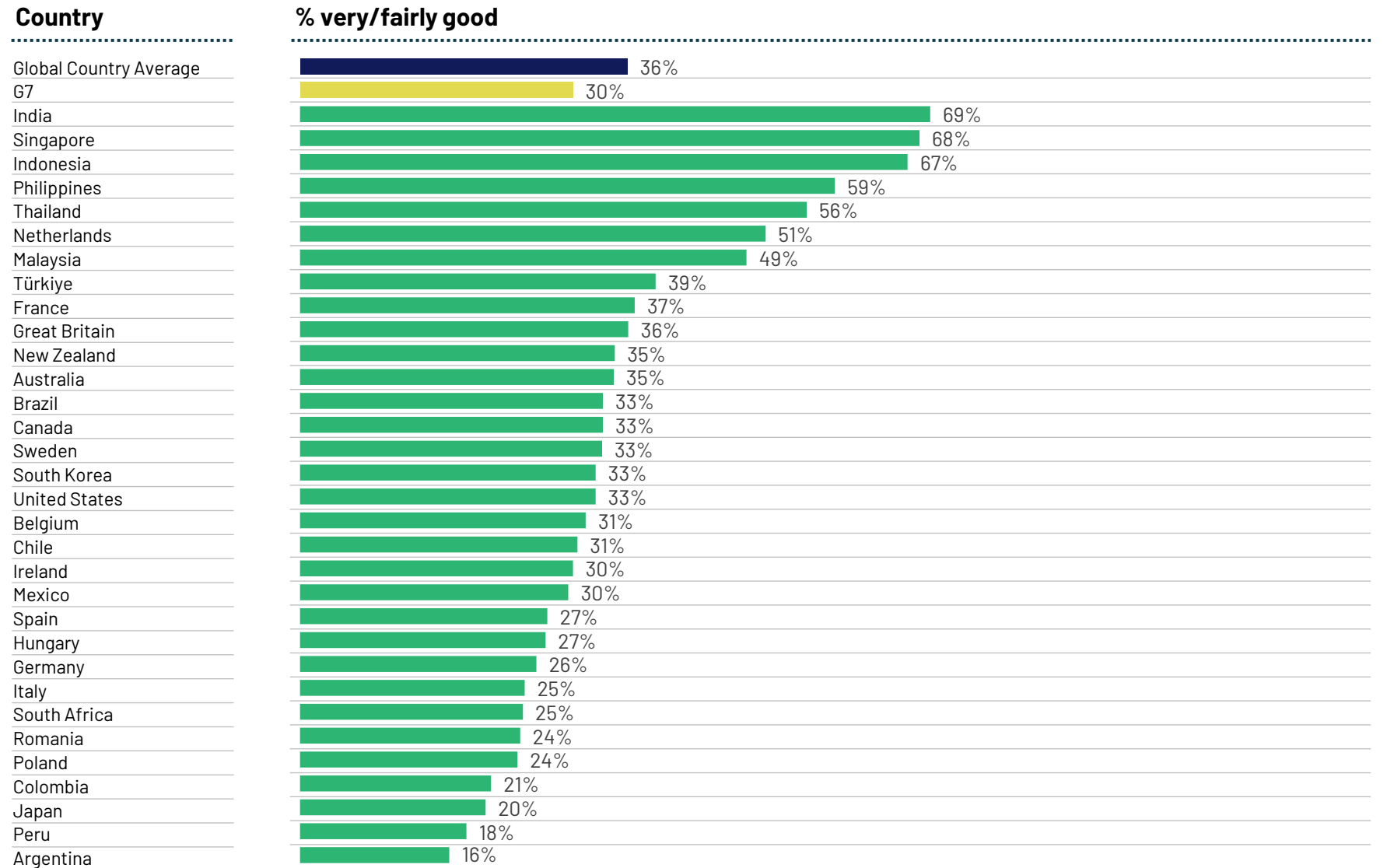
Ratings – Electric vehicle charging infrastructure

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

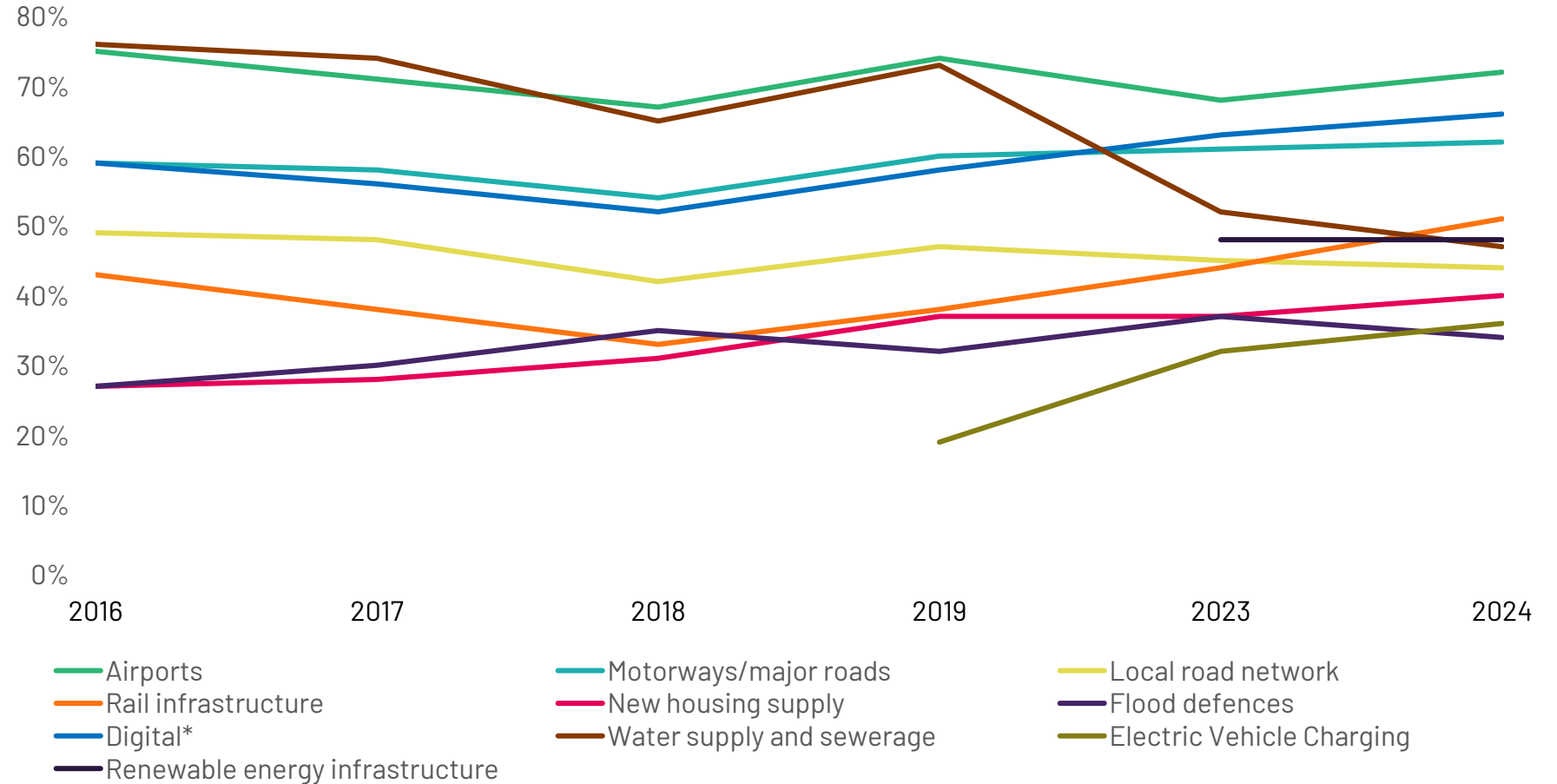
Base: 23,530 adults (online), 32 countries
May-June 2024



Ratings have improved for EV charging in Britain, but got worse for water



% very/fairly good

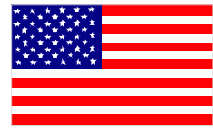


Base: 23,530 adults (online), 32 countries
May-June 2024 - 1,001 in GB

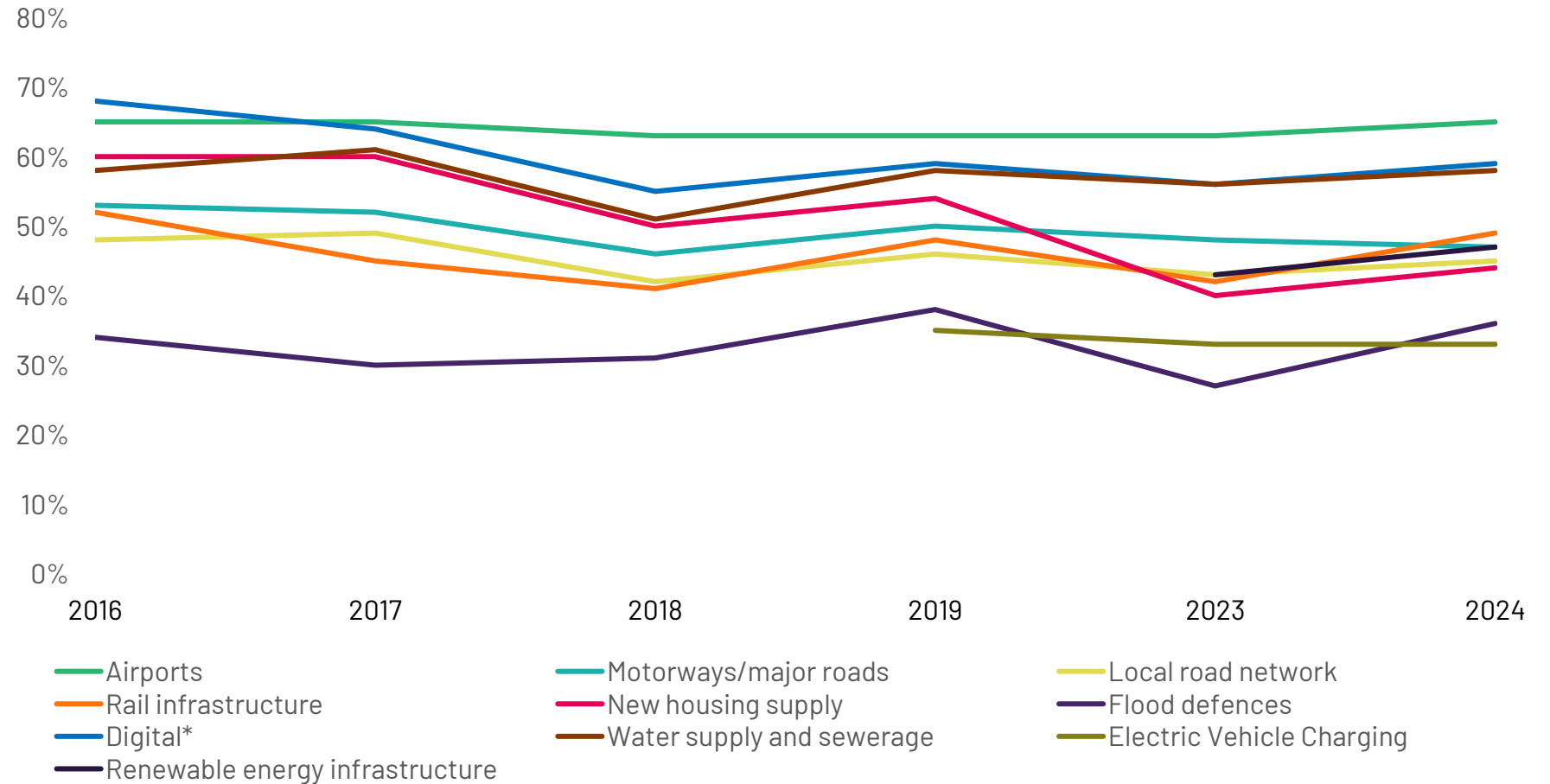
* Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G



The picture has been subject to less change in the U.S



% very/fairly good



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

Base: 23,530 adults (online), 32 countries
May-June 2024 - 1,001 in US

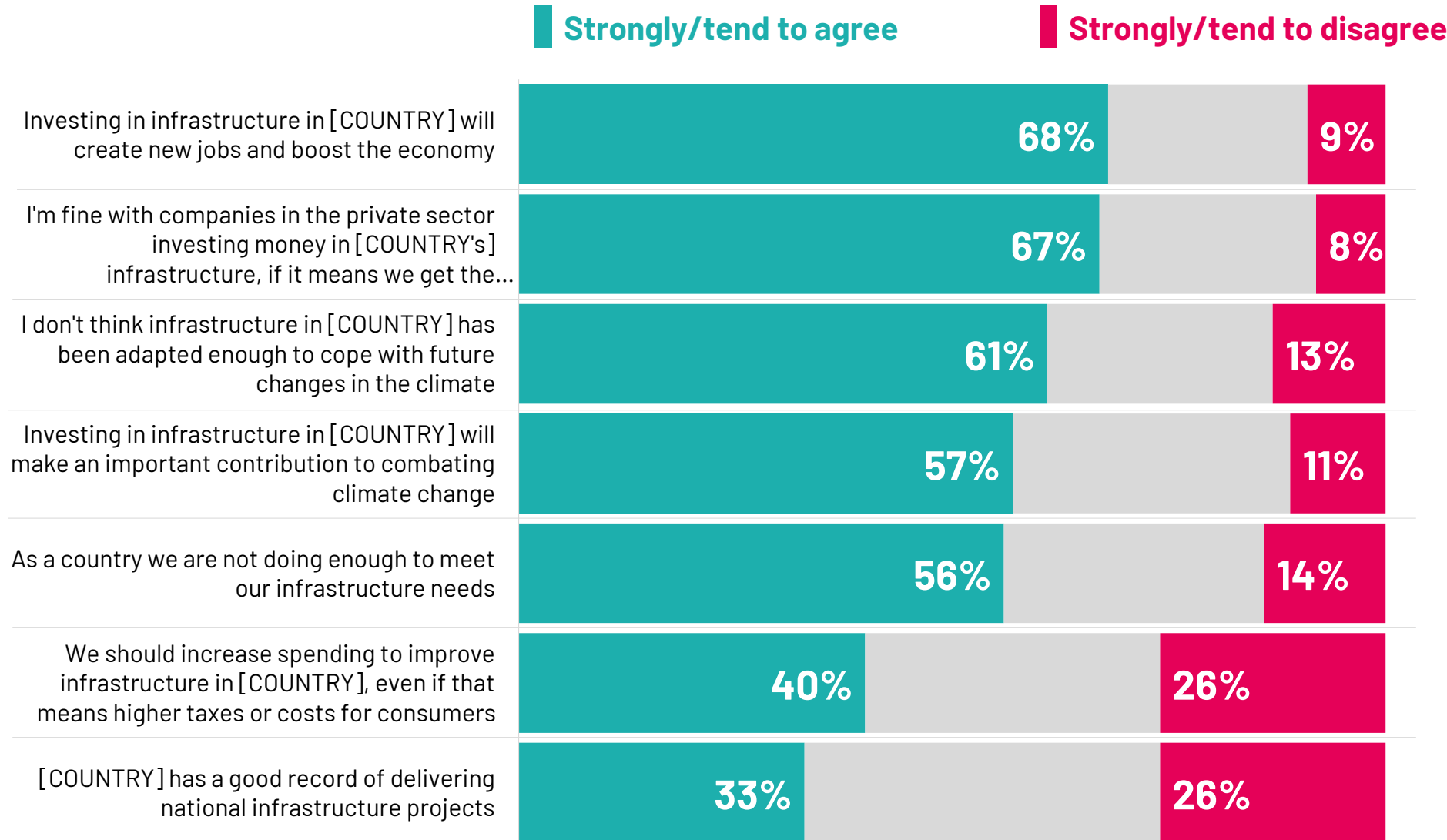
ATTITUDES



Attitudes towards infrastructure

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...?

Base: 23,530 adults (online), 32 countries
May-June 2024

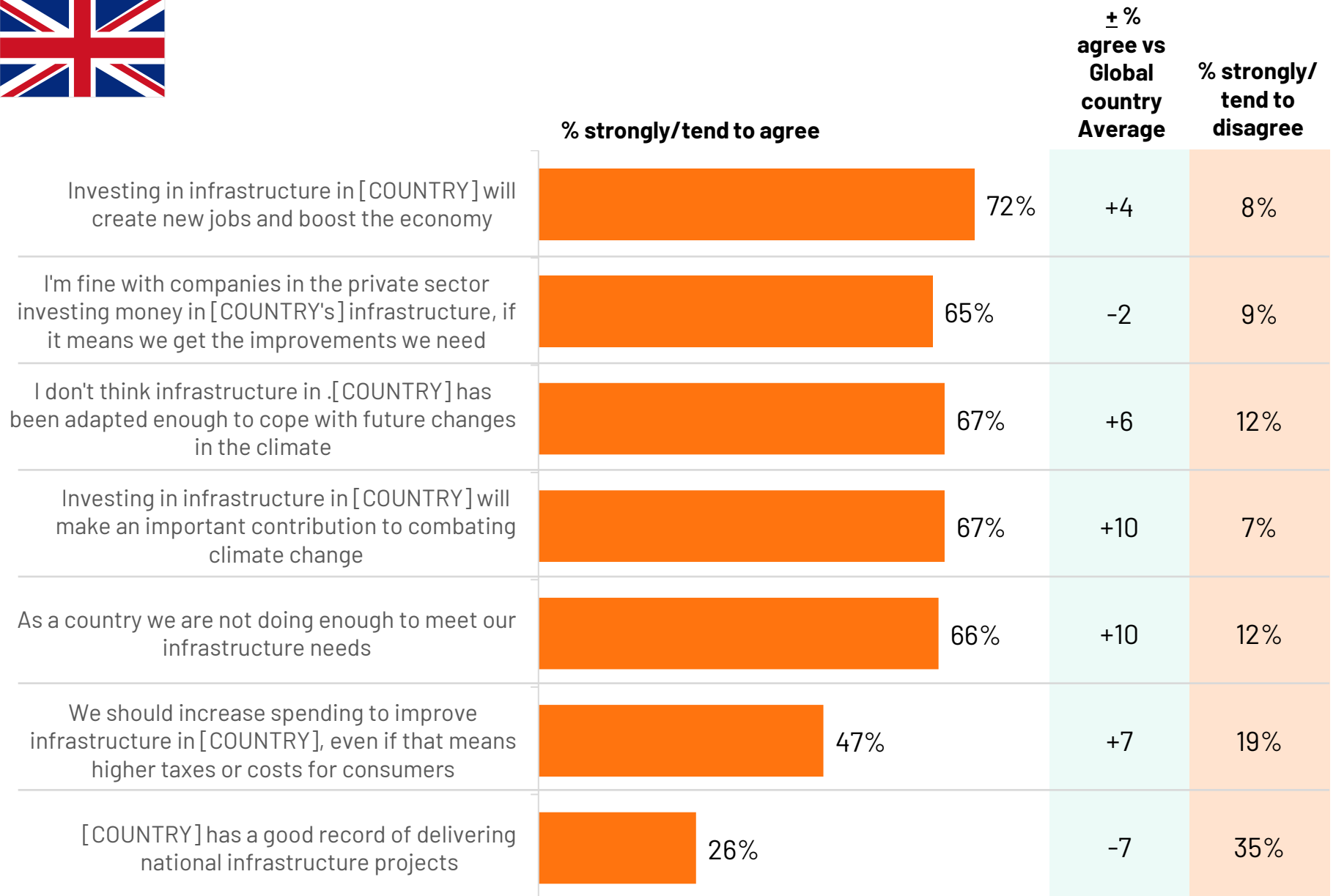


Attitudes towards infrastructure – Britain

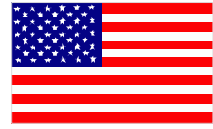


Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

Base: 23,530 adults (online), 32 countries
May-June 2024 – 1,001 in GB

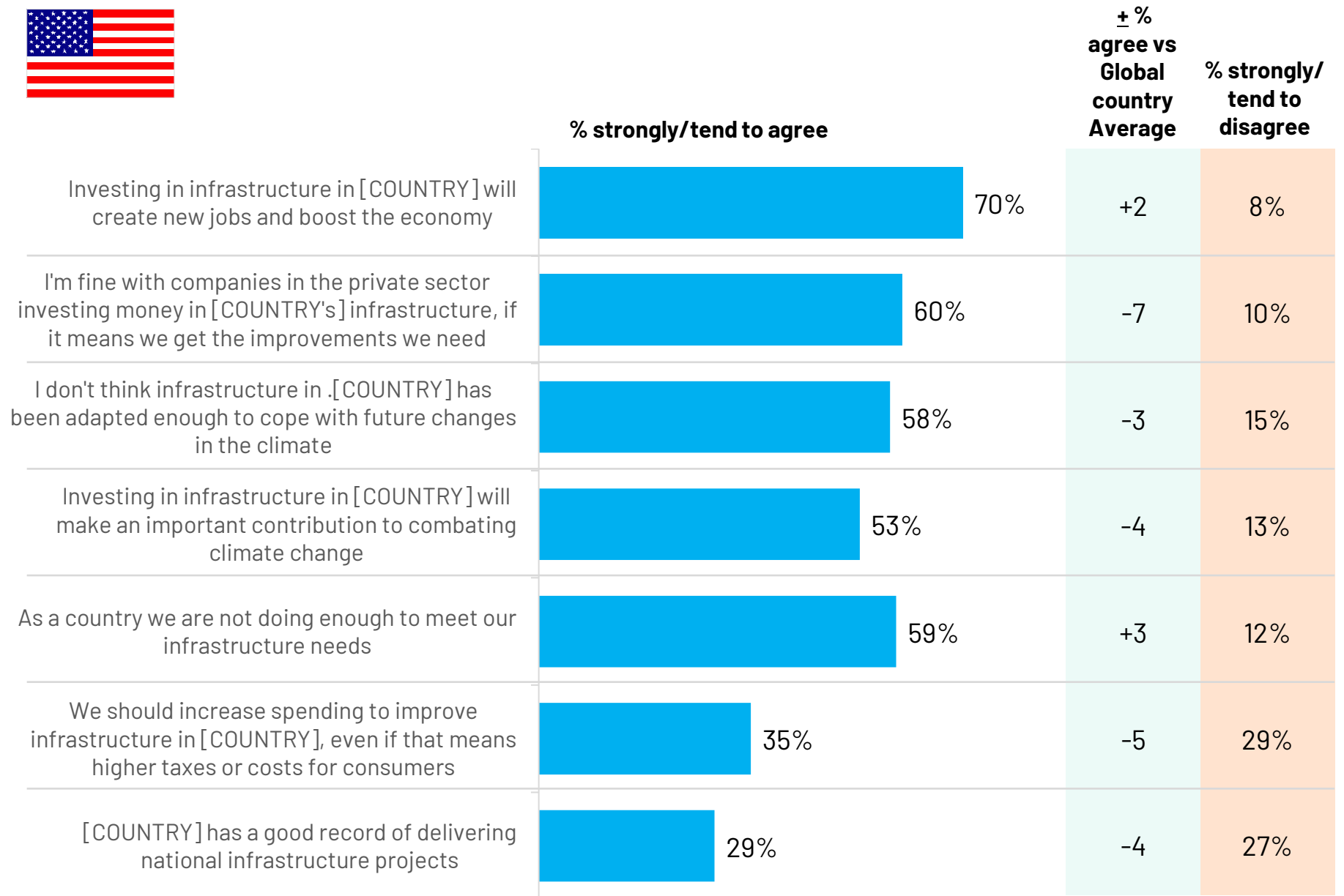


Attitudes towards infrastructure – U.S.



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...?

Base: 23,530 adults (online), 32 countries
May-June 2024 – 1,001 in US



A majority in most countries agree that their country is not doing enough to meet 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...?

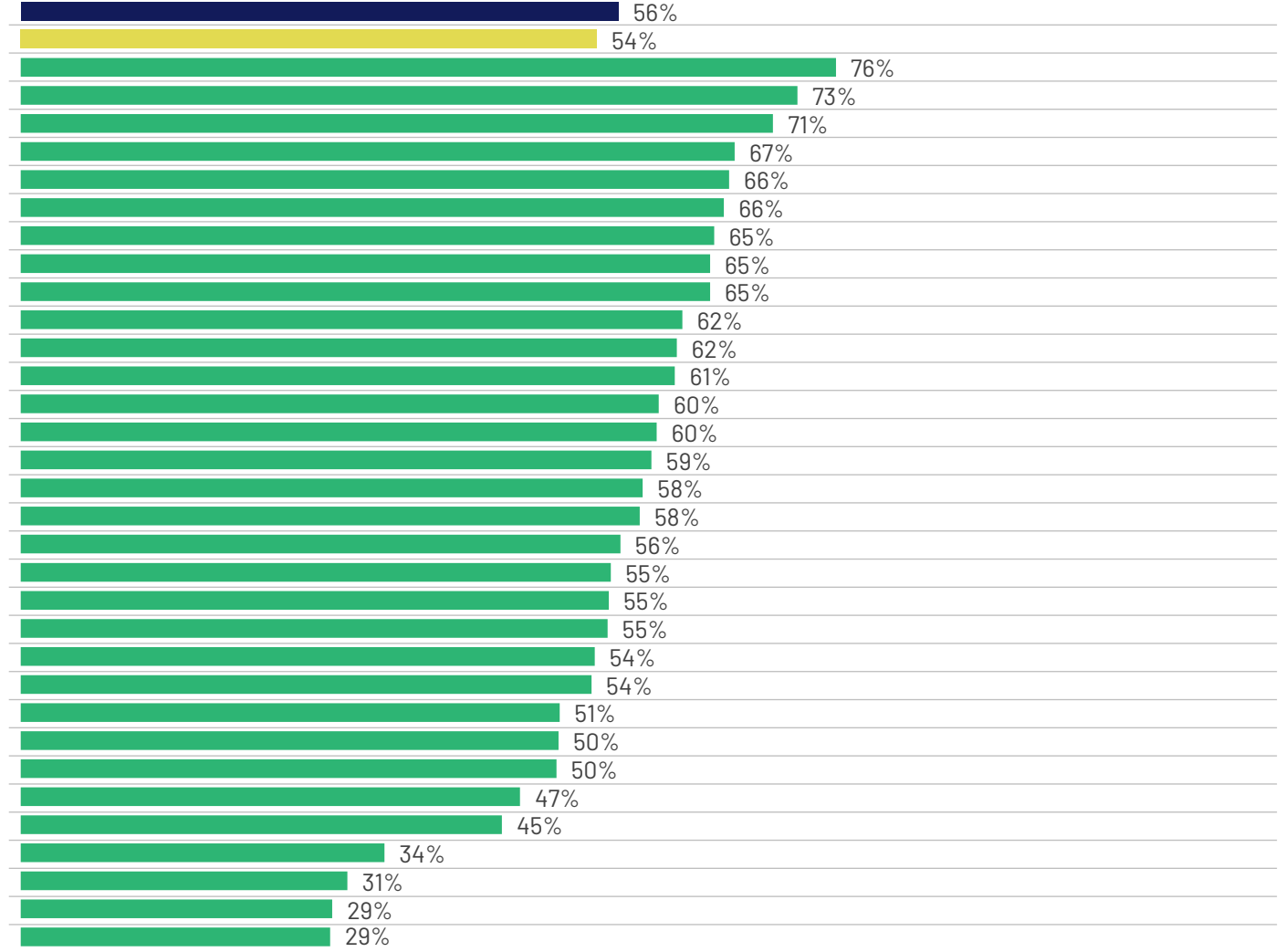
“As a country we are not doing enough to meet our infrastructure needs”

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

% strongly/tend to agree

Global Country Average
G7
Romania
South Africa
Thailand
New Zealand
Great Britain
India
Brazil
Argentina
Peru
Philippines
Mexico
Italy
Germany
Ireland
United States
Malaysia
Türkiye
Hungary
Colombia
Australia
Belgium
Sweden
Canada
France
Indonesia
Spain
Chile
Poland
Singapore
Netherlands
South Korea
Japan



'We're not doing enough' – this sentiment has remained flat over time

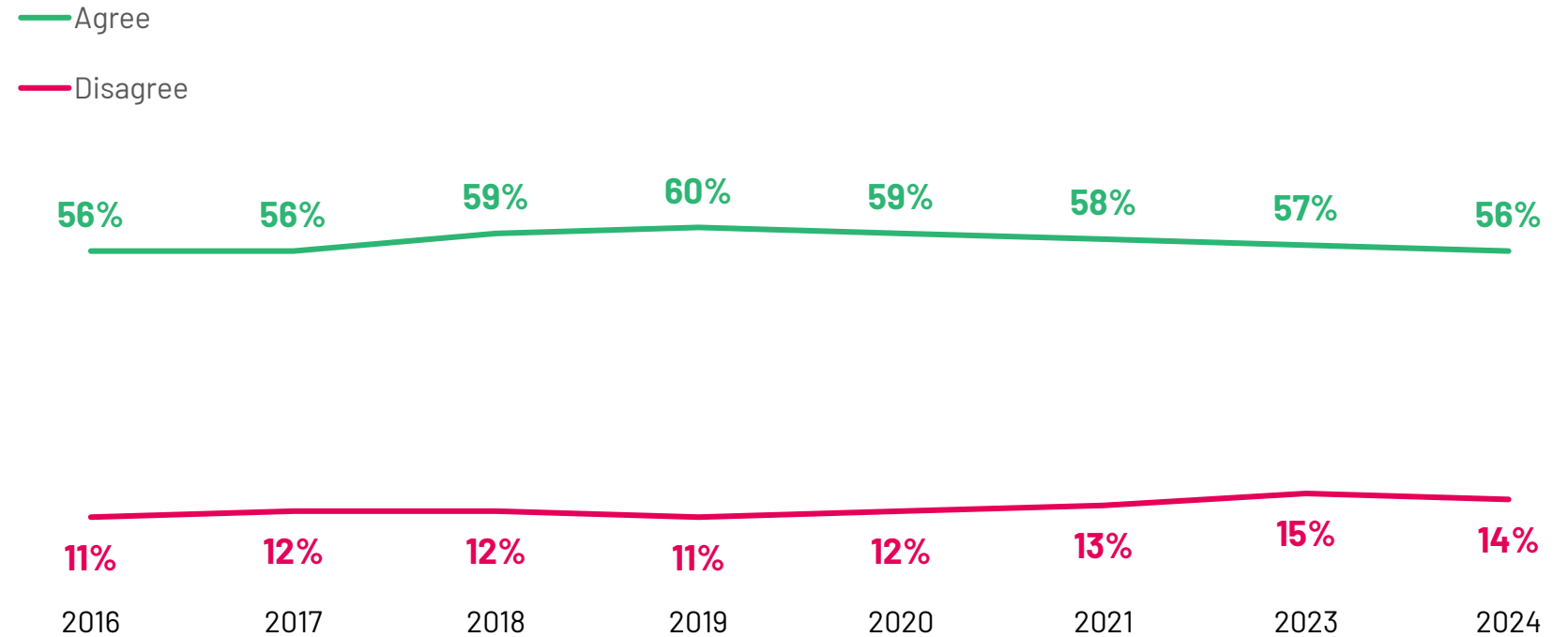
Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...

“As a country we are not doing enough to meet our infrastructure needs”

Base: 23,530 adults (online), 32 countries
May-June 2024

Global Country Average

N.B. number of countries involved has changed over time e.g. 26 in 2016, 32 in 2024

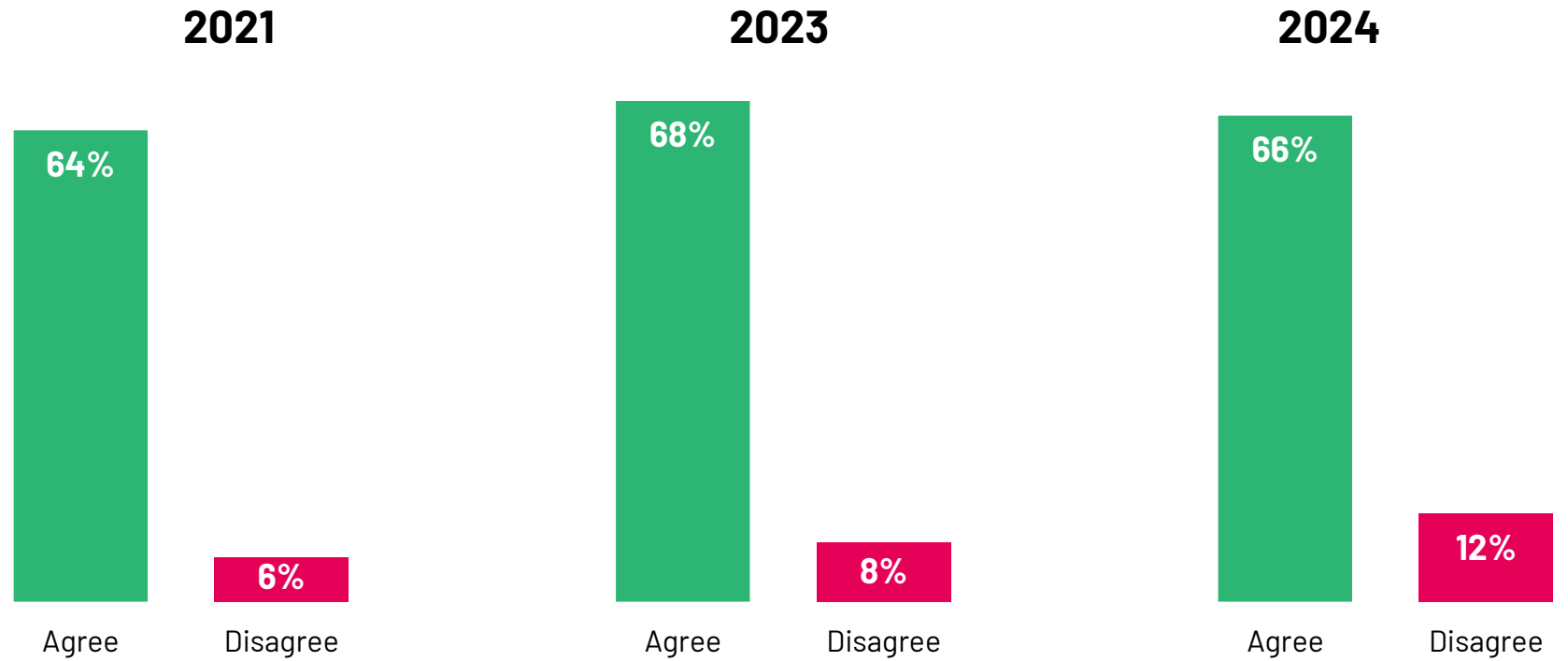


There has been an increase in the proportion disagreeing in Britain, but this remains the minority view

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”

Base: 23,530 adults (online), 32 countries
May-June 2024 – 1,001 in GB

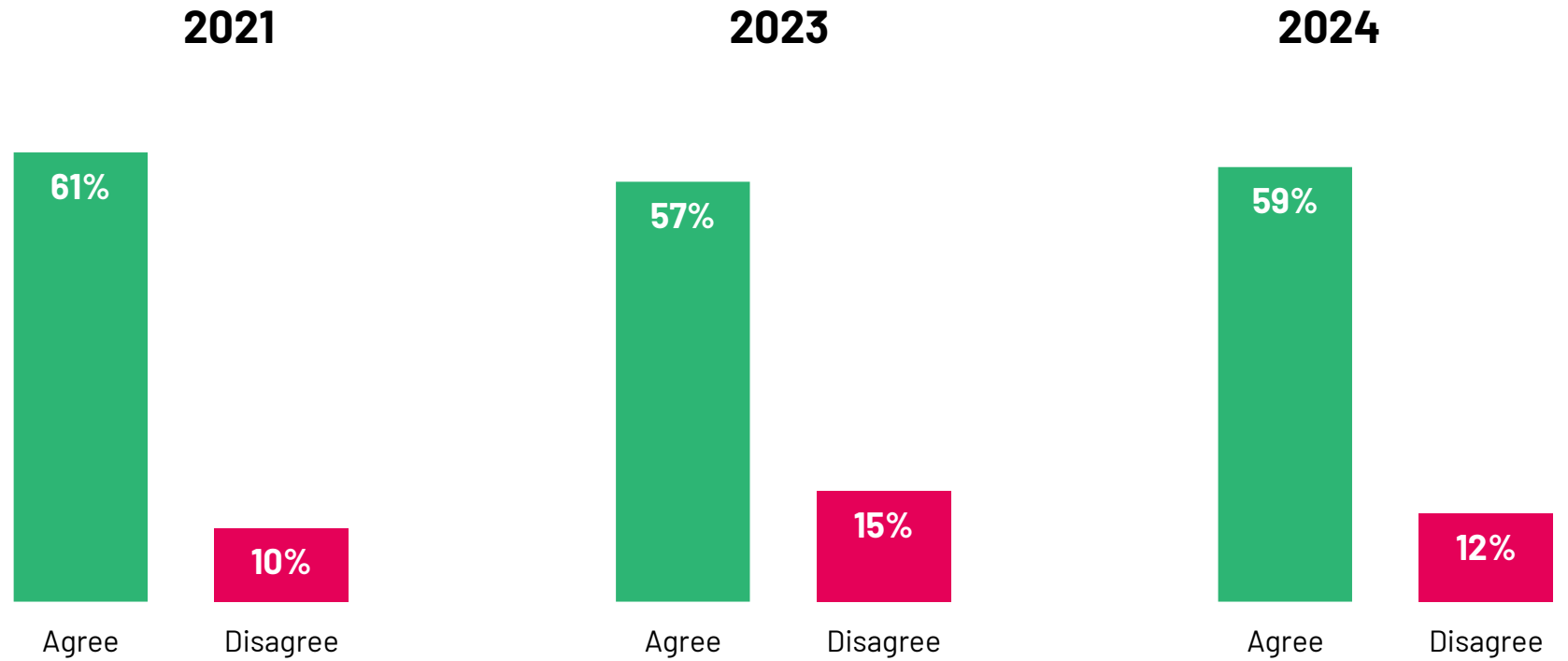
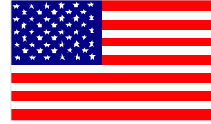


In the U.S., the movement between 2021-23 has been reversed

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”

Base: 23,530 adults (online), 32 countries
May-June 2024 – 1,001 in GB



A majority in most countries agree that infrastructure can 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...?

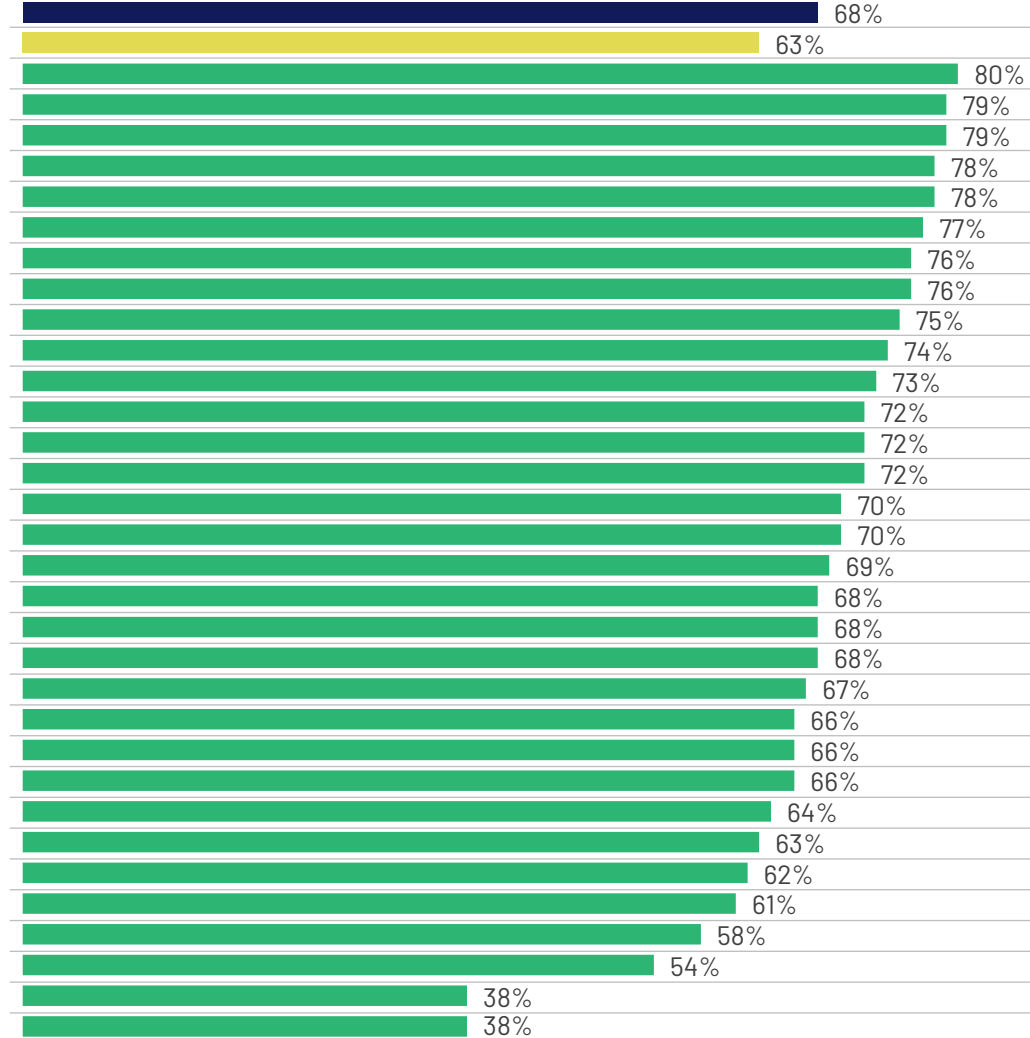
“Investing in infrastructure will create new jobs and boost the economy”

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average
G7
South Africa
Indonesia
New Zealand
Philippines
Peru
Colombia
Ireland
Argentina
Australia
Mexico
Brazil
Great Britain
Chile
Thailand
United States
Italy
Canada
India
Malaysia
Singapore
Poland
Romania
Spain
France
Sweden
Netherlands
Türkiye
Belgium
Germany
Hungary
South Korea
Japan

% strongly/tend to agree



...but fewer want to increase spending if it means higher taxes or costs

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 should increase spending to improve infrastructure in [COUNTRY], even if that means higher taxes or costs for consumers”

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average

G7

India

Thailand

Malaysia

Türkiye

Ireland

Philippines

Singapore

Great Britain

Romania

Poland

Spain

Chile

Indonesia

South Africa

Mexico

Sweden

New Zealand

Brazil

Australia

Italy

Germany

United States

Peru

France

Colombia

Canada

South Korea

Hungary

Belgium

Argentina

Netherlands

Japan

% strongly/tend to agree

40%

35%

65%

57%

51%

48%

47%

47%

47%

47%

46%

44%

43%

43%

42%

41%

41%

40%

40%

39%

38%

38%

37%

35%

34%

33%

33%

32%

32%

30%

30%

29%

29%

24%

There is a mostly majority view that infrastructure can make an important contribution to combating climate change

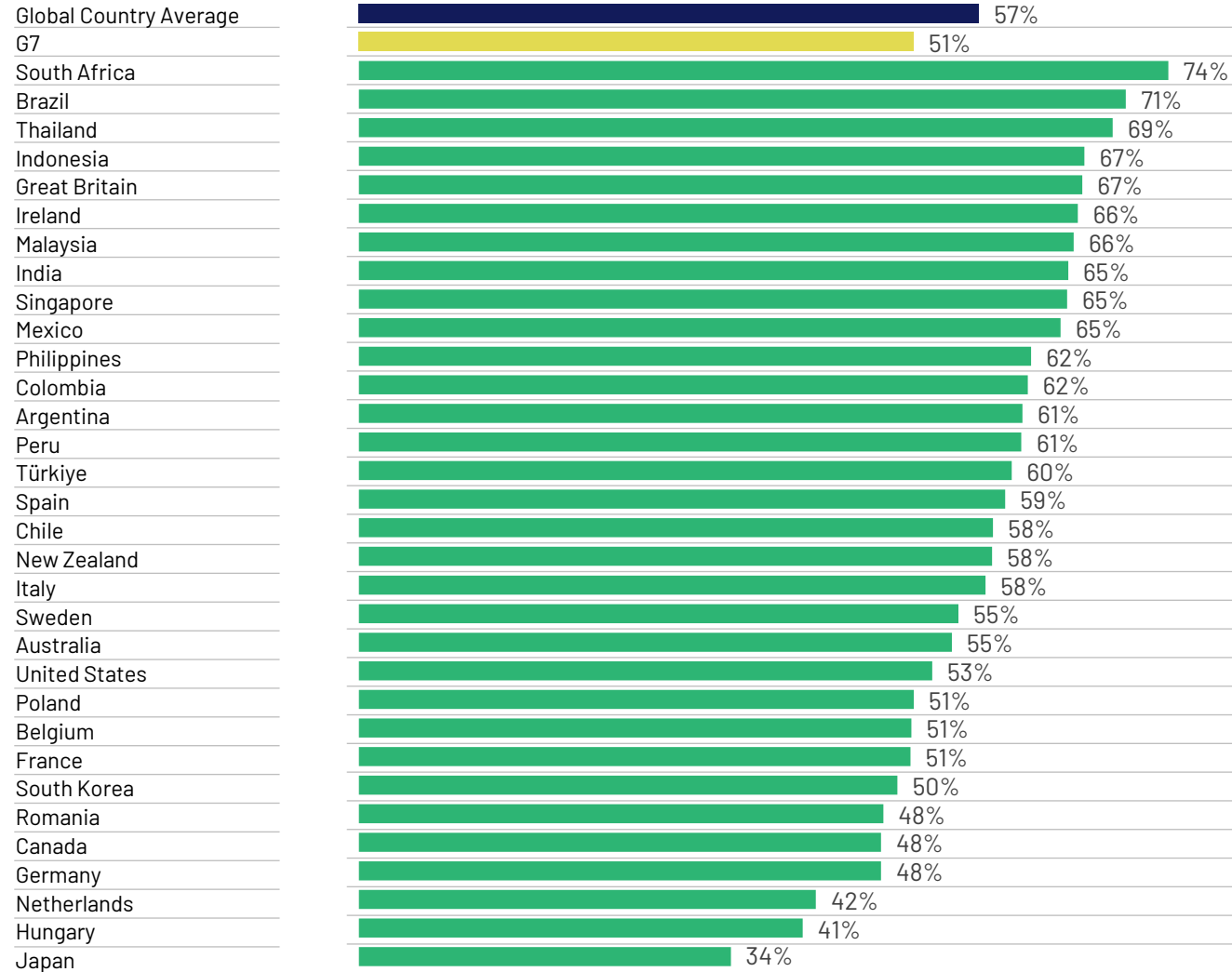
Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

“Investing in infrastructure in [COUNTRY] will make an important contribution to combating climate change”

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

% strongly/tend to agree



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...?

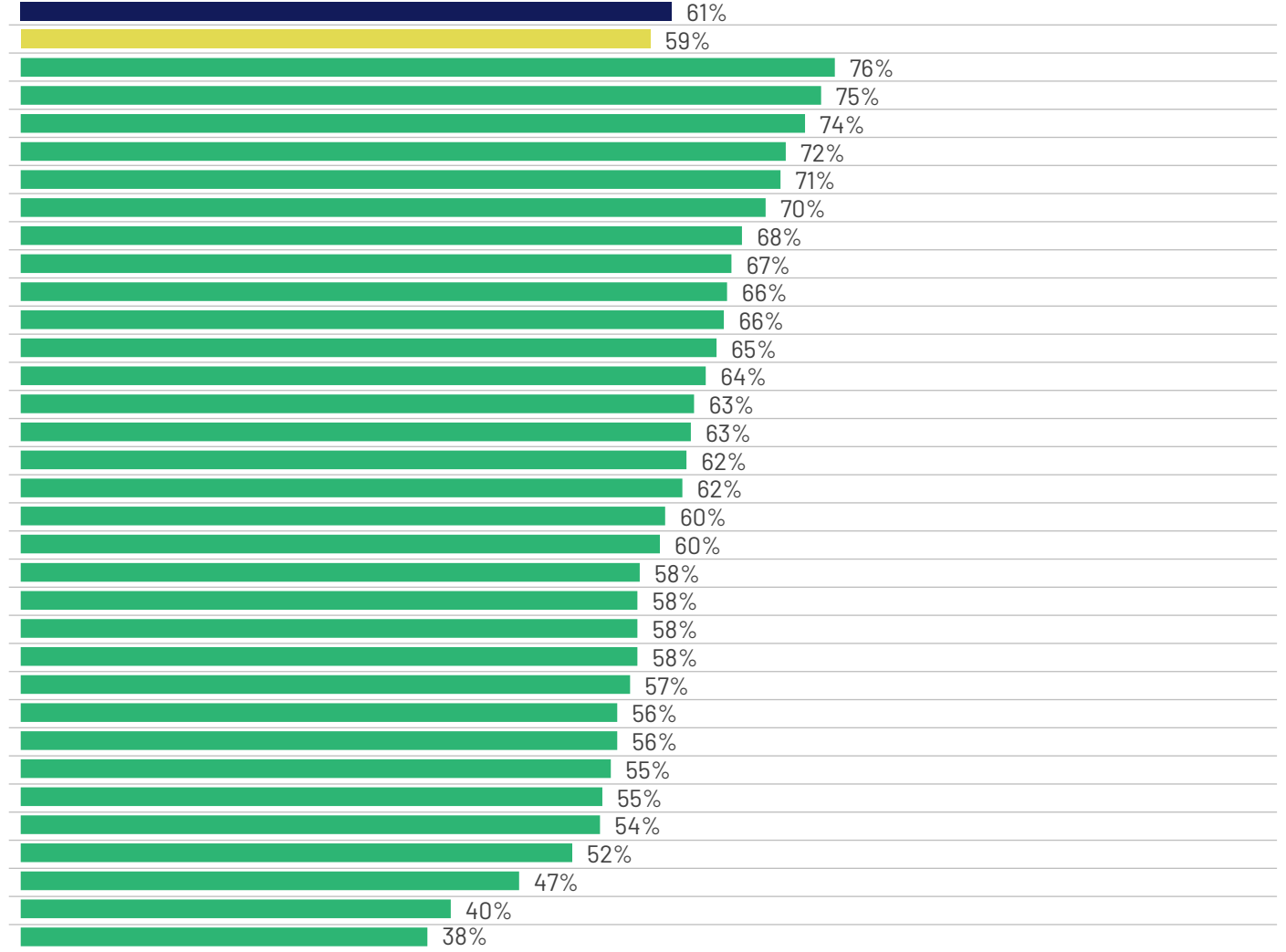
“I don’t think infrastructure in [COUNTRY] has been adapted enough to cope with future changes in the climate”

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average
G7
South Africa
Thailand
Peru
Brazil
Italy
New Zealand
Argentina
Great Britain
Romania
Colombia
Mexico
Ireland
India
Belgium
Germany
Philippines
Hungary
France
Indonesia
Chile
Spain
United States
Australia
Poland
Türkiye
Malaysia
Canada
Sweden
South Korea
Netherlands
Singapore
Japan

% strongly/tend to agree



Most people are fine with private investment if it gets results

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...?

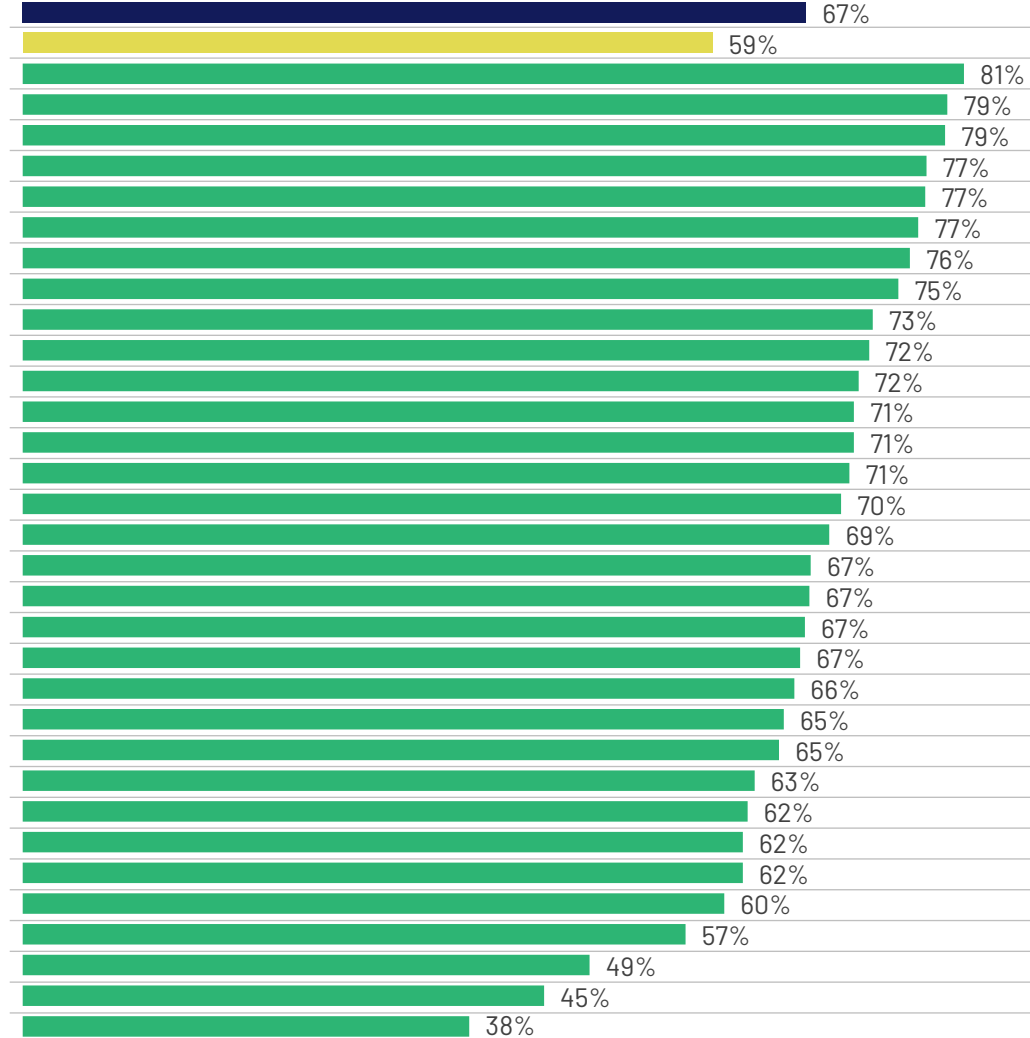
“I’m fine with companies in the private sector investing money in [COUNTRY’S] infrastructure, if it means we get the improvements we need”

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average
G7
Indonesia
Peru
South Africa
Colombia
Mexico
Philippines
Thailand
Argentina
Romania
Brazil
Spain
Chile
Malaysia
Türkiye
Ireland
New Zealand
Italy
Singapore
Poland
India
Sweden
Great Britain
France
Canada
Australia
Belgium
Netherlands
United States
Germany
Hungary
South Korea
Japan

% strongly/tend to agree



In all but a handful of countries, a minority consider their country as having a good record of delivery

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...?

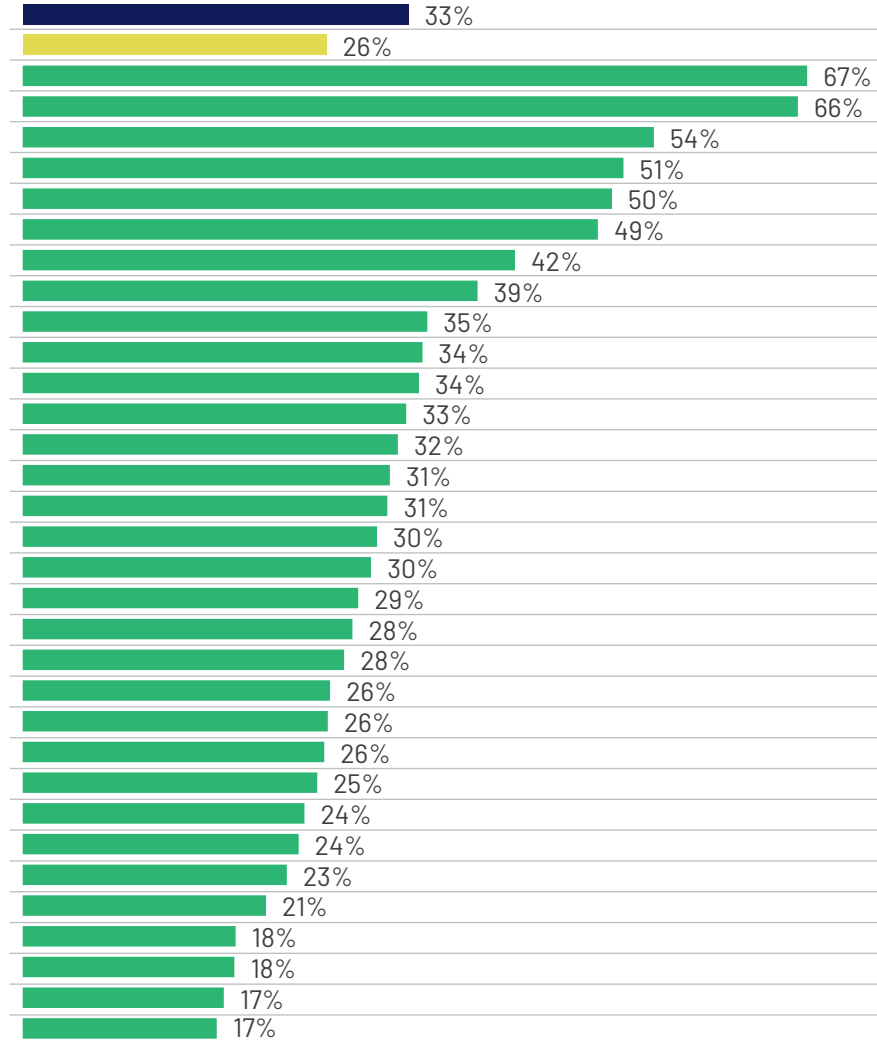
“[COUNTRY] has a good record of delivering national infrastructure projects”

Base: 23,530 adults (online), 32 countries
May-June 2024

Country

Global Country Average
G7
Singapore
India
Thailand
Indonesia
Malaysia
Netherlands
Philippines
Sweden
South Korea
Chile
Türkiye
Spain
Mexico
Italy
Australia
Poland
Ireland
United States
South Africa
Brazil
Germany
Japan
Great Britain
Argentina
Peru
Canada
France
Belgium
Colombia
Romania
Hungary
New Zealand

% strongly/tend to agree



PRIORITIES

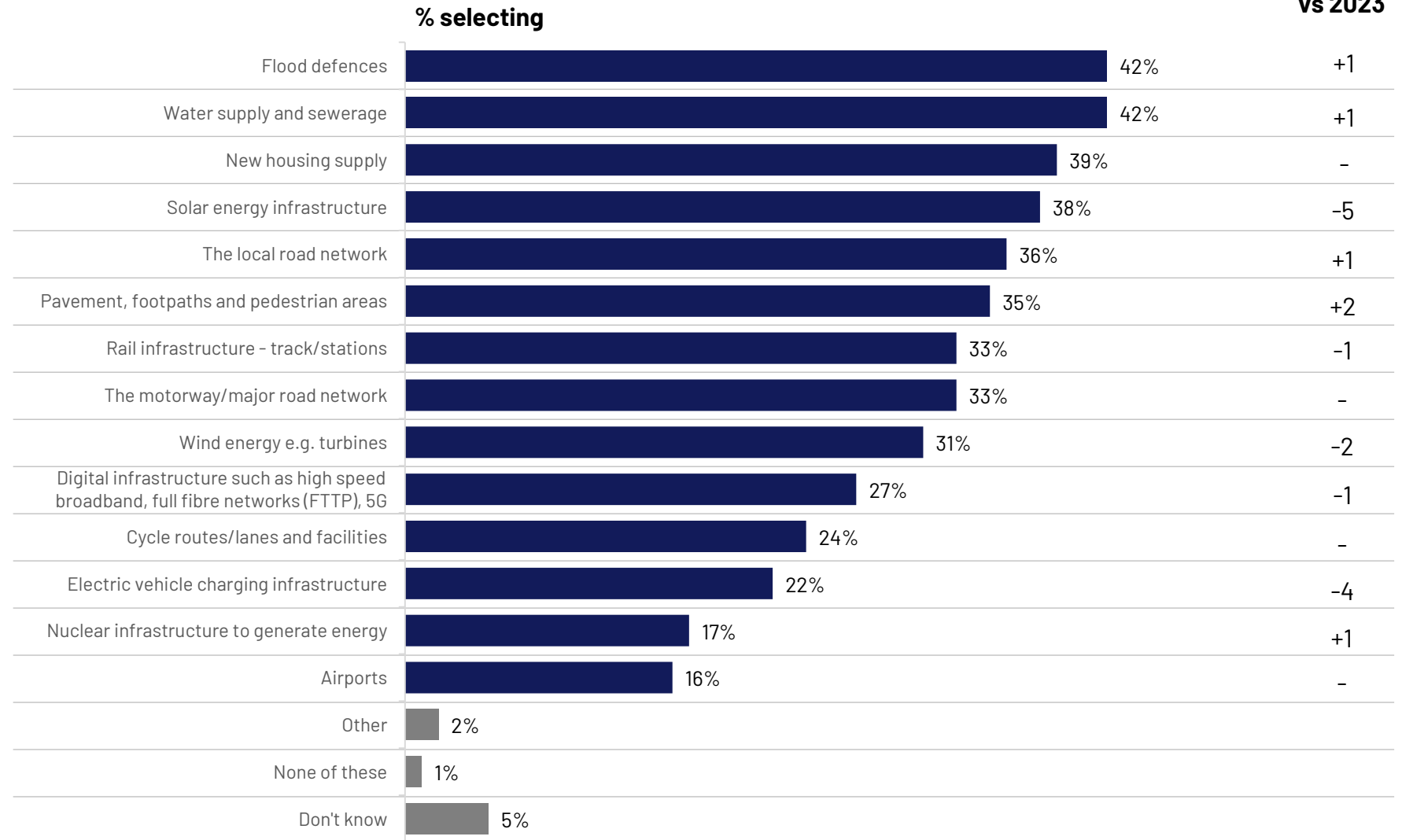


Across the 32 countries, flood defences and water supply/sewerage are top priorities, but not by much

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

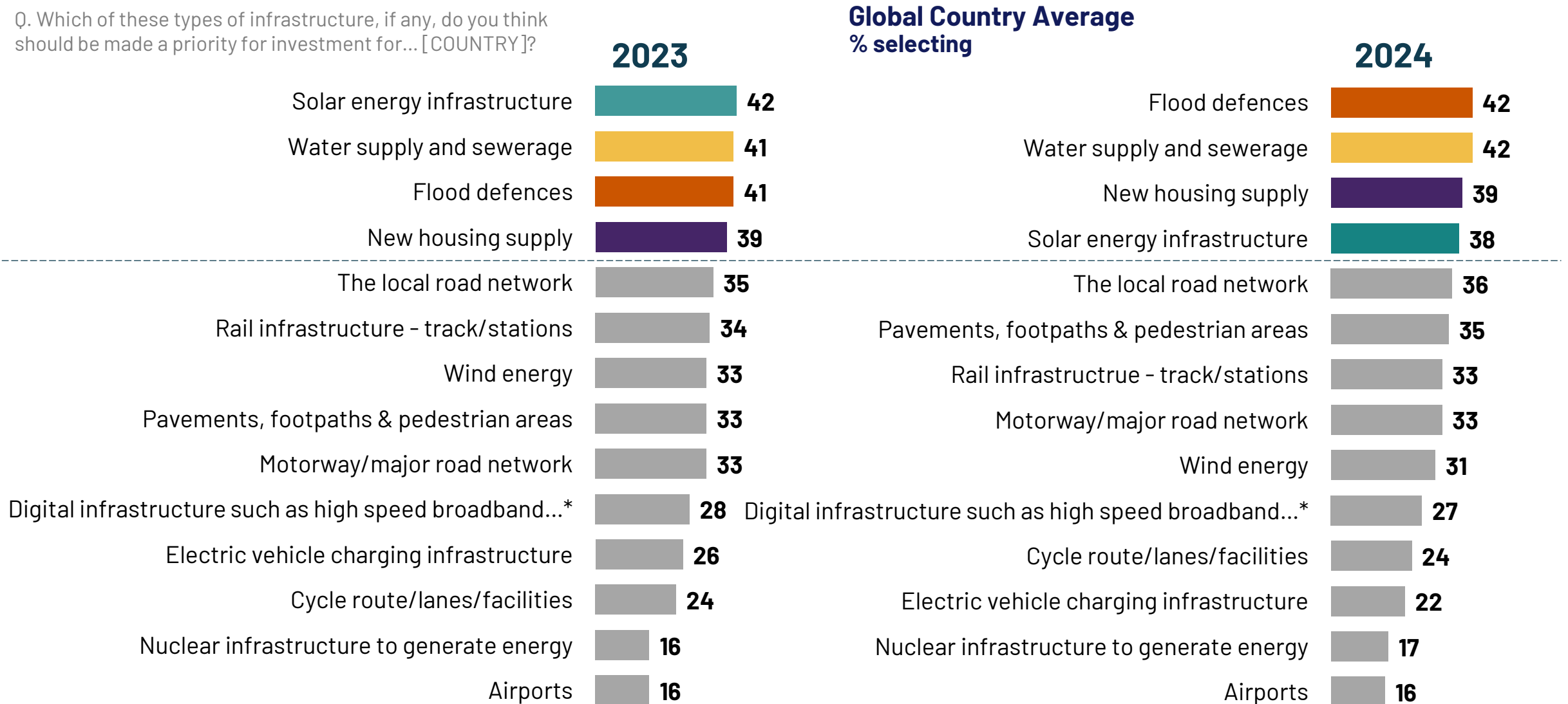
Base: 23,530 adults (online), 32 countries
May-June 2024

Global Country Average



Across the 32 countries, citizens have the same top four priorities, although the order has changed slightly

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



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

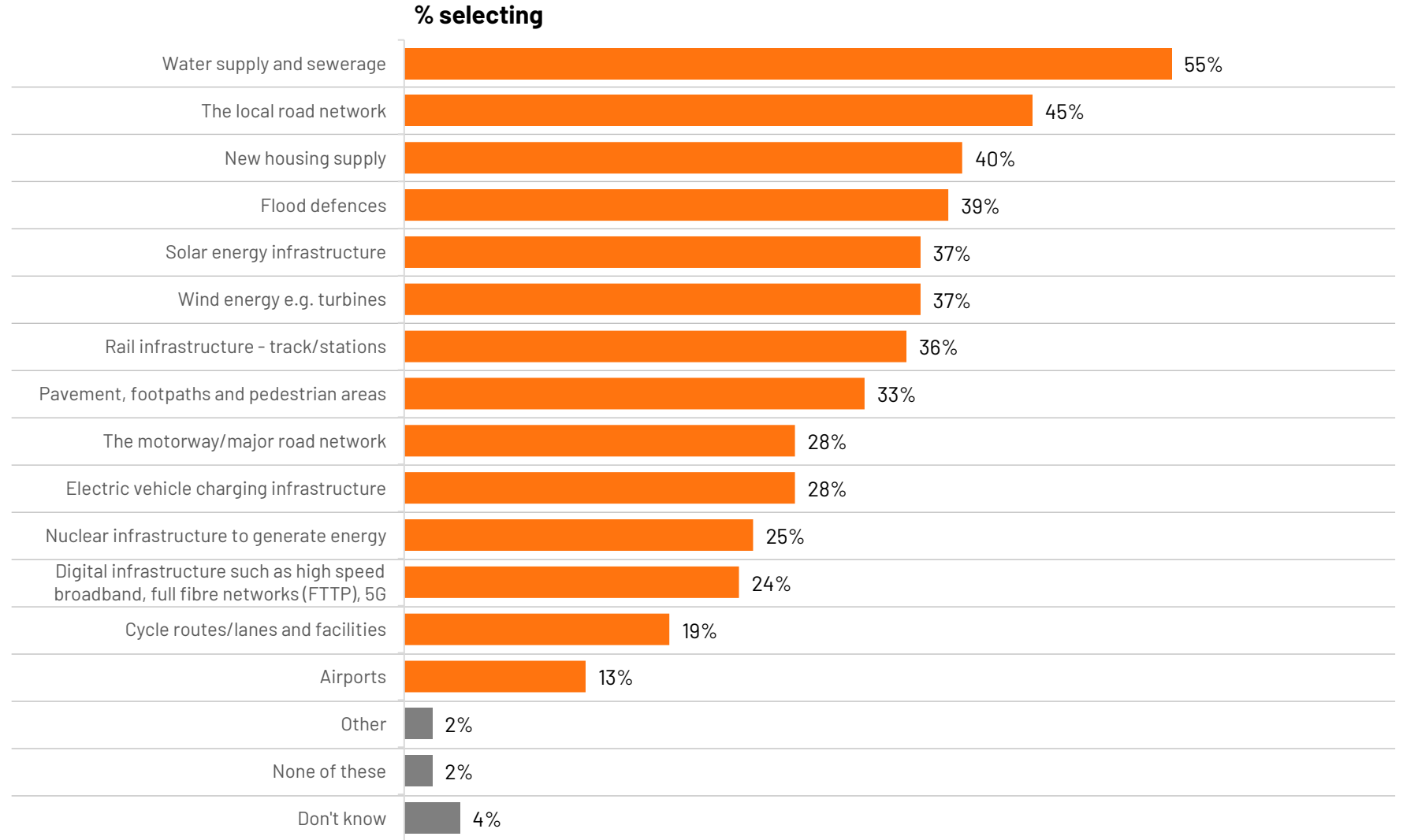
Base: 22,816 adults (online), 31 countries, May-June 2023

Water supply/ sewerage is clear top in Britain



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

Base: 23,530 adults (online), 32 countries
May-June 2024 - 1,001 in GB



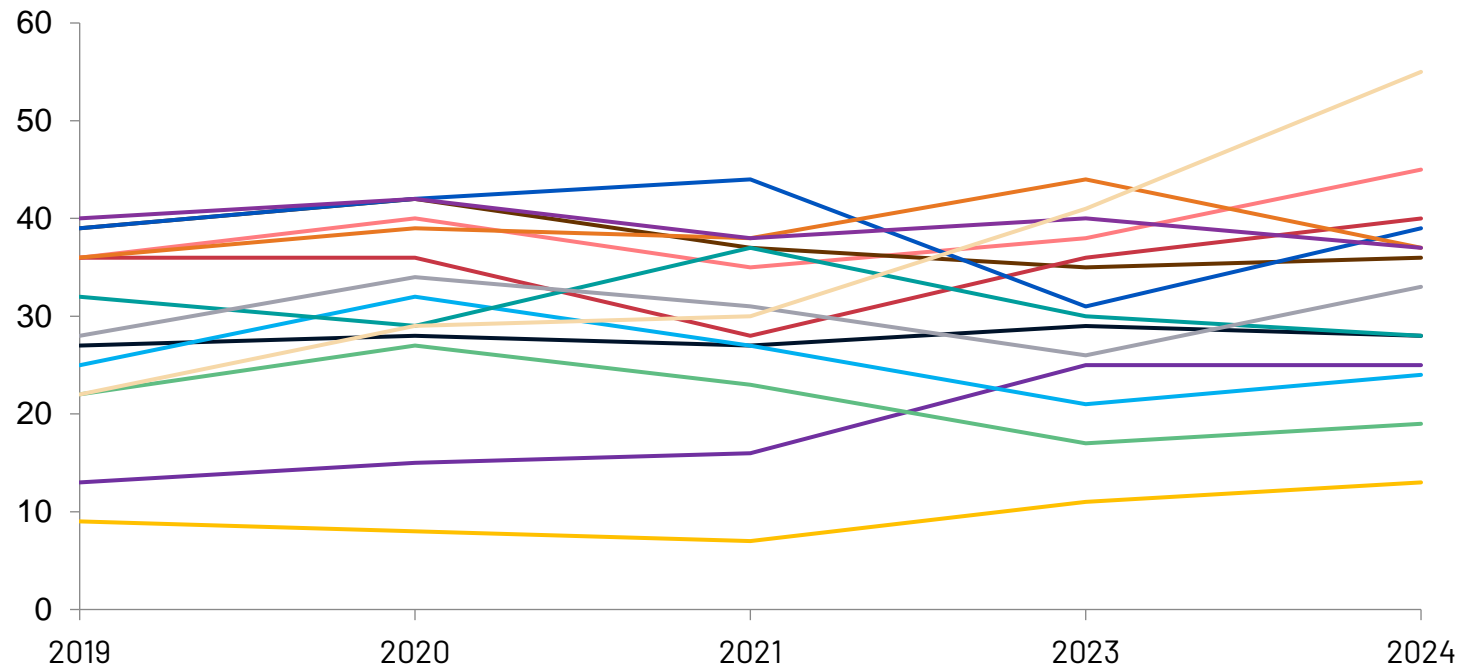
In Britain, there has been a significant increase in the priority attached to water supply/ sewerage

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

Base: 23,530 adults (online), 32 countries
May-June 2024 - 1,001 in GB



% selecting



Change vs 2023 >+5

Water supply +14

Local road network +7

Wind energy -7

Flood defences +8

Pavements +7

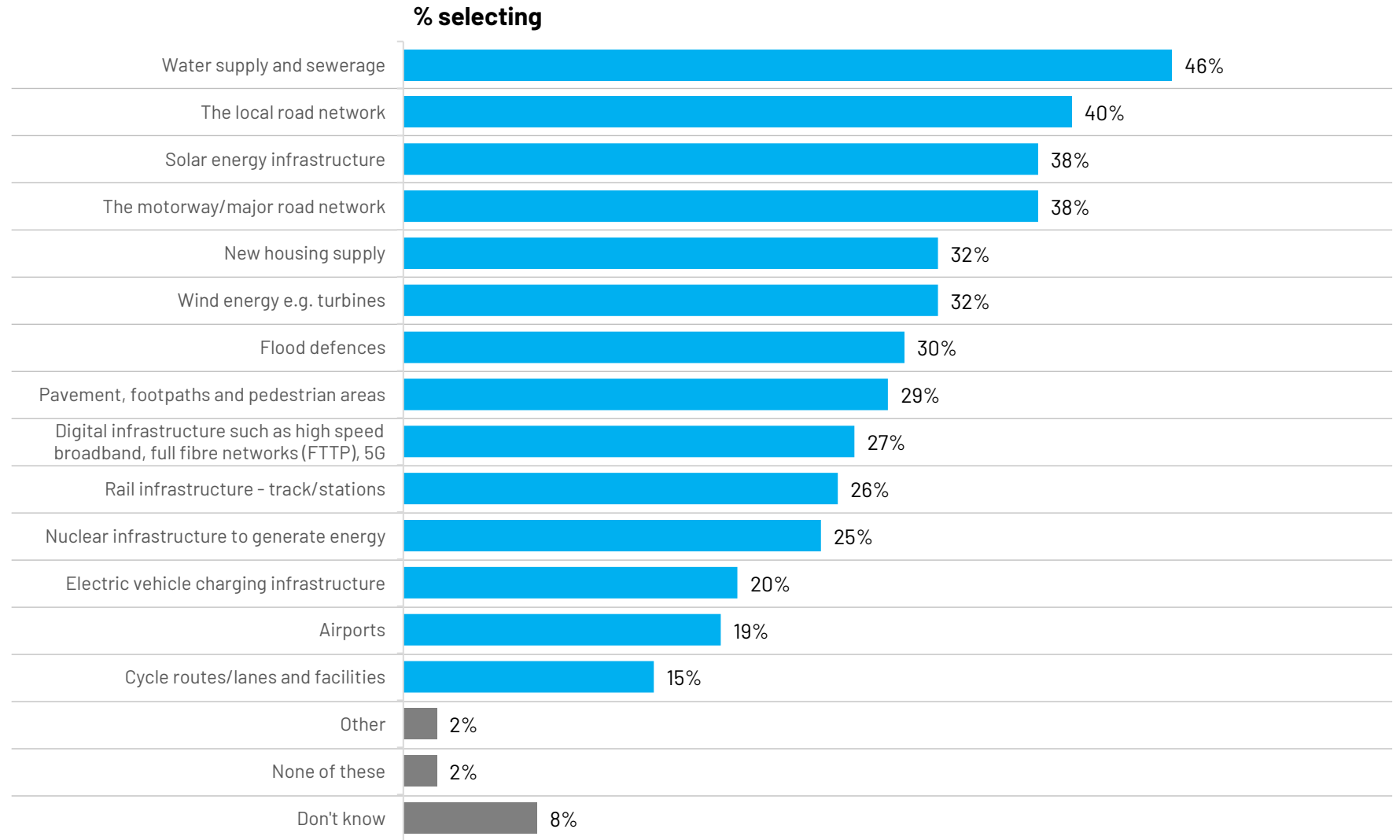
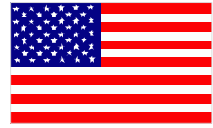
- Airports
- Rail infrastructure - track/stations
- Nuclear
- Solar energy infrastructure
- Pavements, footpaths, pedestrian areas
- Motorways/major road network
- New housing supply
- Digital
- Electric vehicle charging infrastructure
- Water supply and sewerage
- Local road network
- Flood defences
- Wind energy
- Cycle route/lanes/facilities



Water supply/ sewerage is also top in the U.S.

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

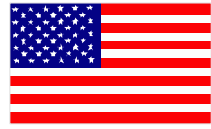
Base: 23,530 adults (online), 32 countries
May-June 2024 - 1,001 in US



In the U.S., there has been much less change over time in public priorities

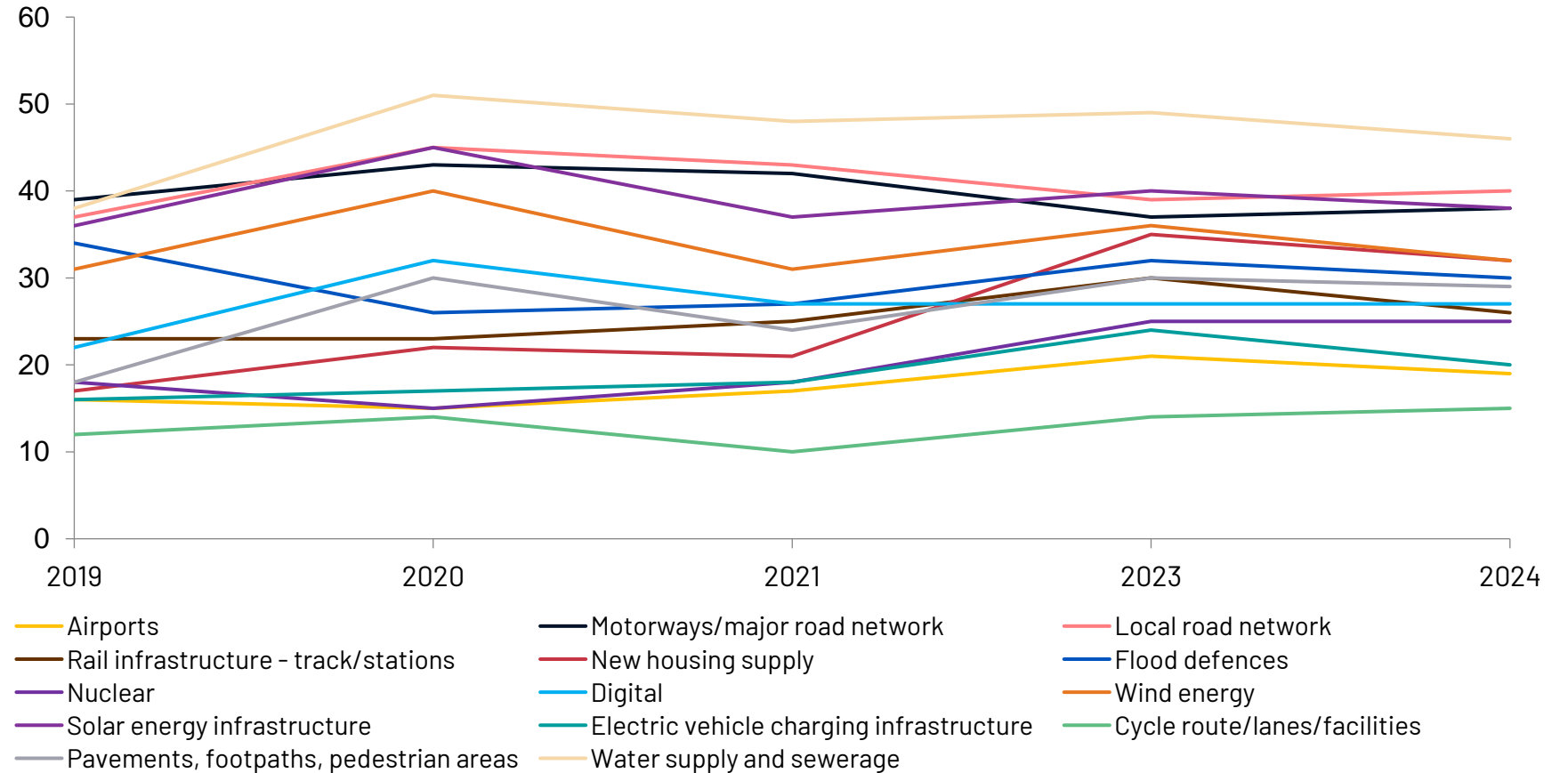
Q. Which of these types of infrastructure, if any, do you think should be made a priority for investment for United States?

Base: 23,530 adults (online), 32 countries
May-June 2024 - 1,001 in US



% selecting

N.B. no changes >+5 vs 2023



APPENDIX



METHODOLOGY

These are the results of a 32-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, May 24 and Friday, June 7, 2024. For this survey, Ipsos interviewed a total of 23,530 adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Malaysia, the Philippines, South Africa, Turkey, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals each in Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, New Zealand, Spain, and the U.S., and 500 individuals each in Argentina, Belgium, Chile, Colombia, Hungary, Indonesia, Ireland, Malaysia, Mexico, the Netherlands, Peru, Philippines, Poland, Romania, Singapore, South Africa, South Korea, Sweden, Thailand, and Türkiye.

The sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, New Zealand, Poland, South Korea, Spain, Sweden, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Chile, China, Colombia, Indonesia, Ireland, Malaysia, Mexico, Peru, Philippines, Romania, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more “connected” segment of their population.

India’s sample represents a large subset of its urban population – social economic classes A, B and C in metros and tier 1-3 town classes across all four zones.

The data is weighted so that the composition of each country’s sample best reflects the demographic profile of the adult population according to the most recent census data. “The Global Country Average” reflects the average result for all the countries and markets in which the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

When percentages do not sum up to 100 or the ‘difference’ appears to be +/-1 percentage point more/less than the actual result, this may be due to rounding, multiple responses, or the exclusion of “don’t know” or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll where N=1,000 being accurate to +/- 3.5 percentage points and of where N=500 being accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.



Regions

Regions - countries and *unweighted sample sizes*

Europe	N. America	LATAM	Asia-Pacific (APAC)	ME Africa	G7
x12	x2	x6	x10	x2	x7
8,510	2,001	3,506	8,810	1,002	7,005
Belgium	Canada	Argentina	Australia	South Africa	Canada
France	U.S.A.	Brazil	India	Türkiye	France
Germany		Chile	Indonesia		Germany
Great Britain		Colombia	Japan		Great Britain
Hungary		Mexico	Malaysia		Italy
Ireland		Peru	New Zealand		Japan
Italy			Philippines		U.S.A
Netherlands			Singapore		
Poland			South Korea		(Russia
Romania			Thailand		excluded)
Spain					
Sweden					



FURTHER INFORMATION:

www.ipsos.com

<https://giia.net/>



ben.marshall@ipsos.com



VBenn@giia.net

