

GLOBAL INFRASTRUCTURE INDEX 2024

32 country study

New Zealand Edition

In partnership with:



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2024 | October 2024



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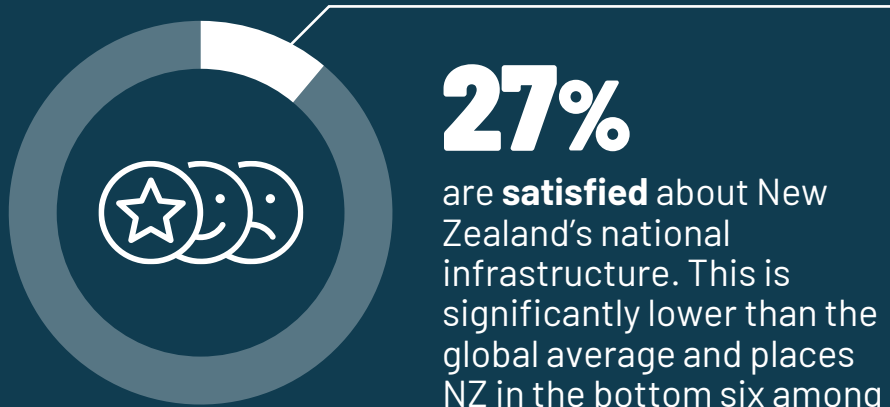
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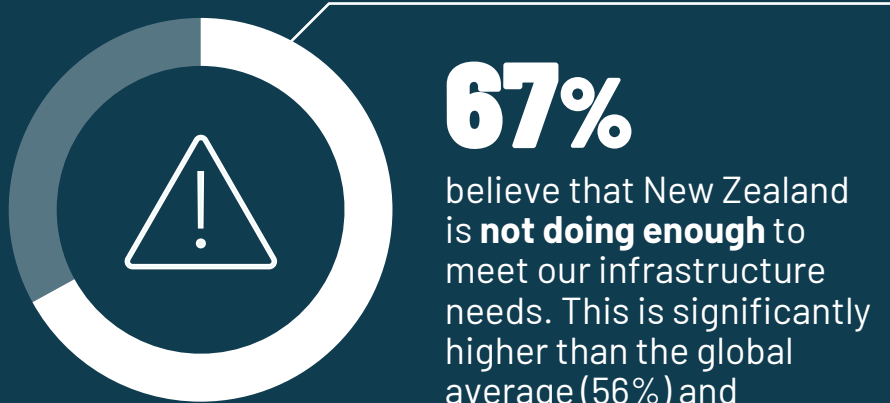
Methodology

New Zealand at a glance



27%

are **satisfied** about New Zealand's national infrastructure. This is significantly lower than the global average and places NZ in the bottom six among the 32 countries surveyed.



67%

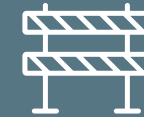
believe that New Zealand is **not doing enough** to meet our infrastructure needs. This is significantly higher than the global average (56%) and compared to 2023 (61%).

81%



rated the quality of New Zealand **airports** as very/fairly good. Airports are New Zealand's highest rated infrastructure type, with a significantly higher quality rating than the global average (72%).

17%



say that New Zealand has a **good record of delivering national infrastructure projects**, placing New Zealand at the bottom (alongside Hungary) among the 32 countries surveyed.

Top infrastructure investment priorities:

New housing supply

55%

Water supply & sewerage

50%

Motorway / major road network

50%

Flood defences

47%

Local road network

47%



Key findings – New Zealand



National infrastructure not up to scratch

42% of New Zealanders say they are dissatisfied with our national infrastructure. We are also skeptical about the future, with 2 in 3 (67%) agreeing that we're not doing enough to meet our infrastructure needs and fewer than 1 in 2 (17%) holding the view that NZ has a good record of delivering national infrastructure projects.



New housing supply and water infrastructure top investment priorities

New housing supply (55%) was identified as the top investment priority by New Zealanders, followed by water supply & sewerage (50%). The quality of new housing supply has been an ongoing concern for New Zealanders and continues to be rated significantly lower than the global average.



Road and transport infrastructure below par

While New Zealanders' rating of the quality of the country's motorway/major road network (50%), local road network (41%) and rail infrastructure (33%) have improved slightly from 2023, they remain significantly below the global average. These have also been identified as priority investment areas by around half of New Zealanders.



Readiness for climate change and climate events in question

70% of New Zealanders don't believe that our infrastructure will cope with future changes in the climate. Notably, despite an improvement, flood defences continue to have the lowest rating of infrastructure quality in New Zealand (24% vs. 18% in 2023) and 47% believe that investment in this should be a priority.



Airports and digital infrastructure rated highly

New Zealanders' rating of the quality of our airports (81%) and digital infrastructure (70%) are significantly higher than the global average. New Zealanders' rating of these two infrastructure types have also gone up since 2023 (from 75% and 65% respectively).



Looking into the future

4 in 5 (79%) New Zealanders believe that investing in infrastructure will create new jobs and boost the economy (this is significantly higher than the global average of 68%). However, only 2 in 5 (40%) agree that we should increase spending to improve infrastructure in the country at the expense of taxpayers and consumers.



SATISFACTION

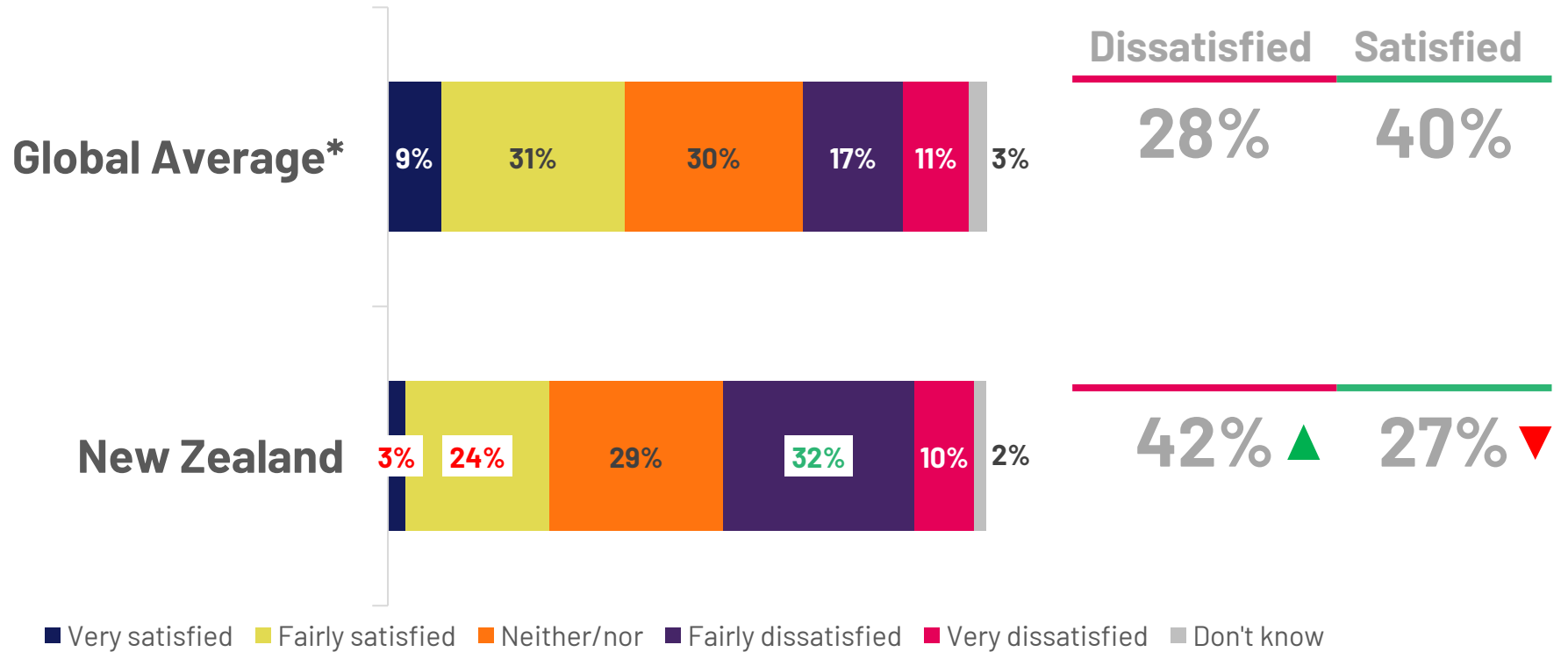


New Zealanders are significantly less satisfied with infrastructure compared to the global average.

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?

Base: New Zealand May-Jun '24 (n=1,001), Global May - Jun '24 (n=23,530)



* 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

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

Satisfaction with national infrastructure

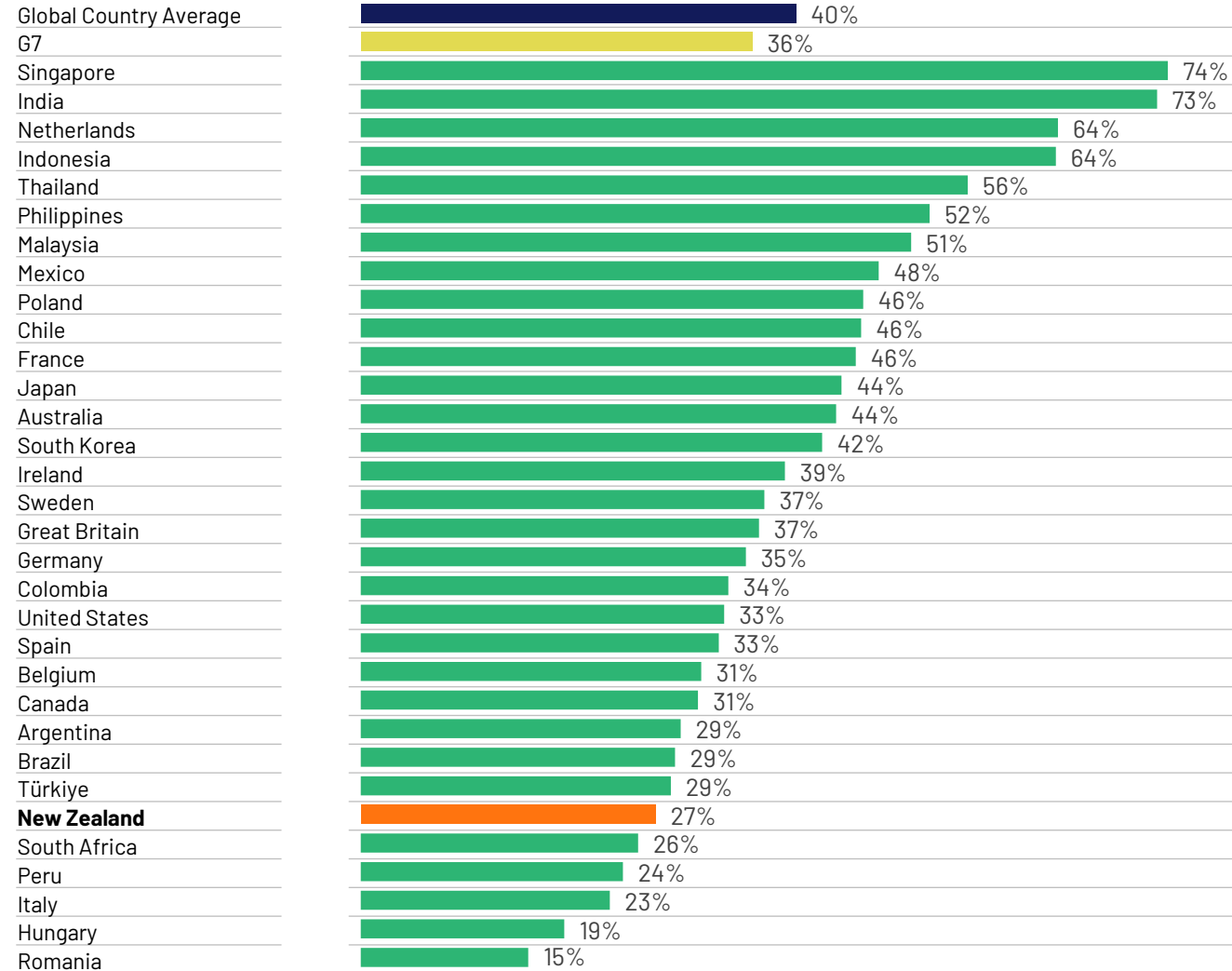
Q. We now want you to think about [COUNTRY'S] infrastructure. By infrastructure we mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

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

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

Country

% very/fairly satisfied



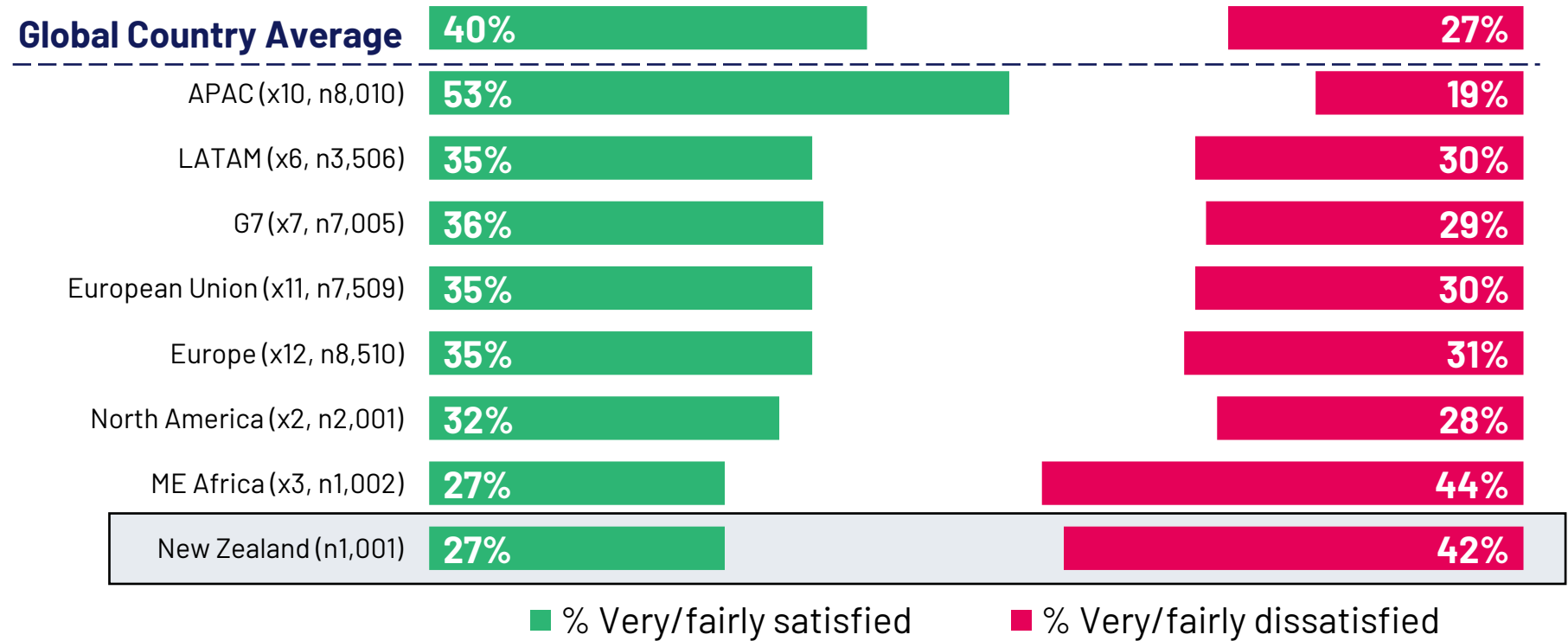
Satisfaction with national infrastructure

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: Global May - Jun '24 (n=23,530)



Longer-term trends: Satisfaction dipped sharply in New Zealand between 2019 and 2023

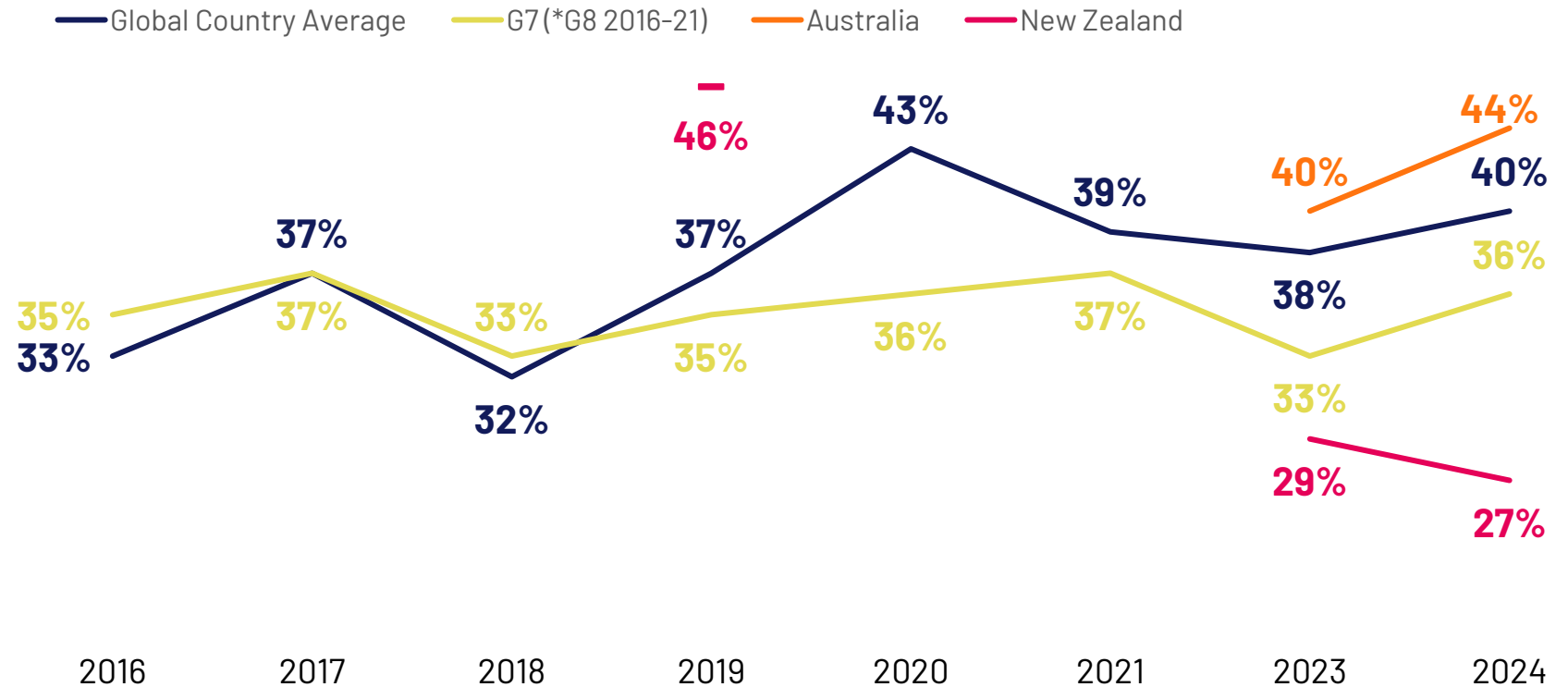
Q. We now want you to think about [COUNTRY'S] infrastructure. By infrastructure we mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

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

Base: Global May - Jun '24 (n=23,530)

Global Country Average

% very/fairly satisfied



INFRASTRUCTURE SECTORS



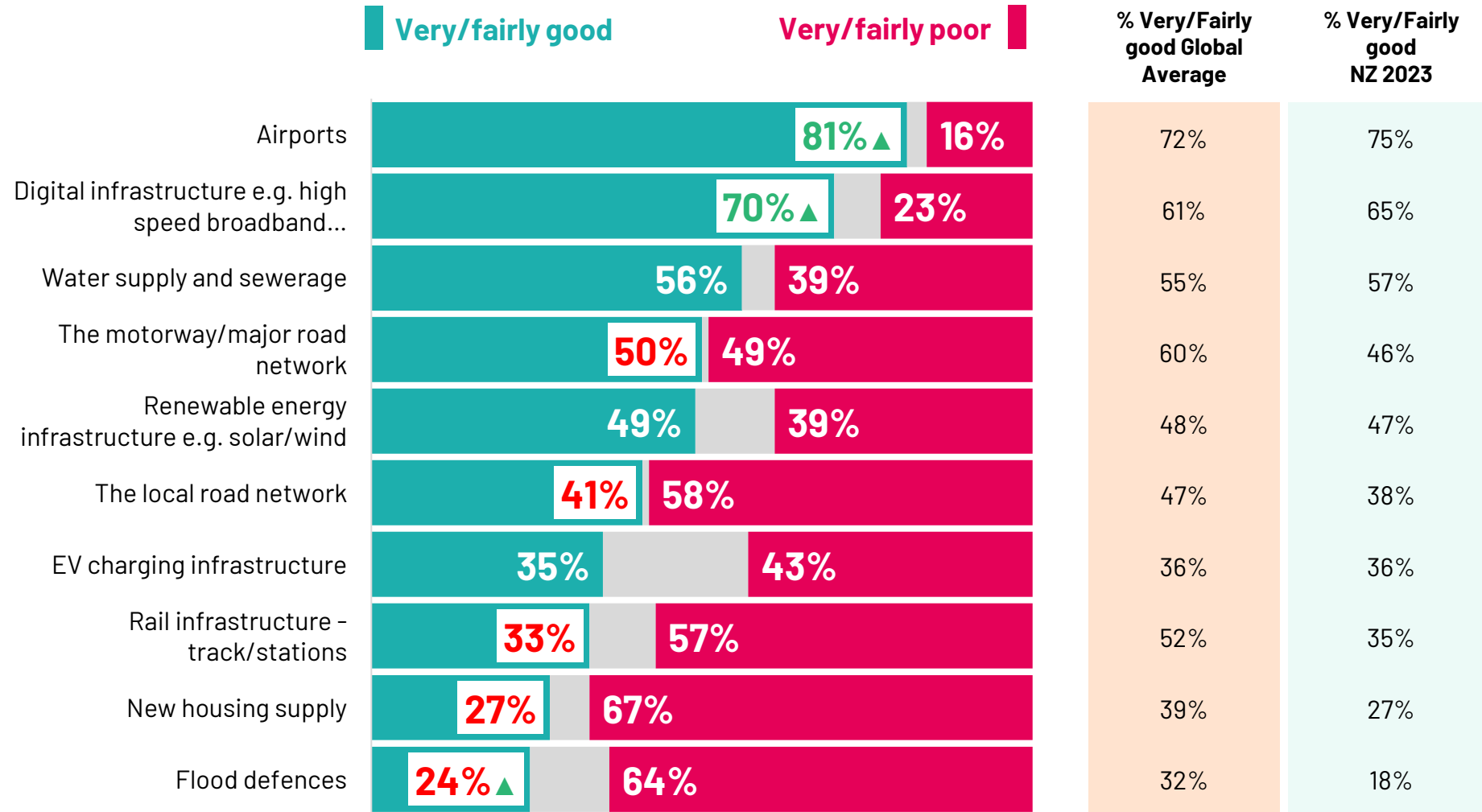


New Zealand's airports and digital infrastructure rated highly compared to the global average and better compared to 2023

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: New Zealand (n=1,001), Global (n=23,530)
May - Jun '24 / New Zealand (n=1,004) May - Jun '23



green / red indicates significantly higher / lower compared to the Global Average
▲ / ▼ indicates significantly higher / lower compared to New Zealand's 2023 result





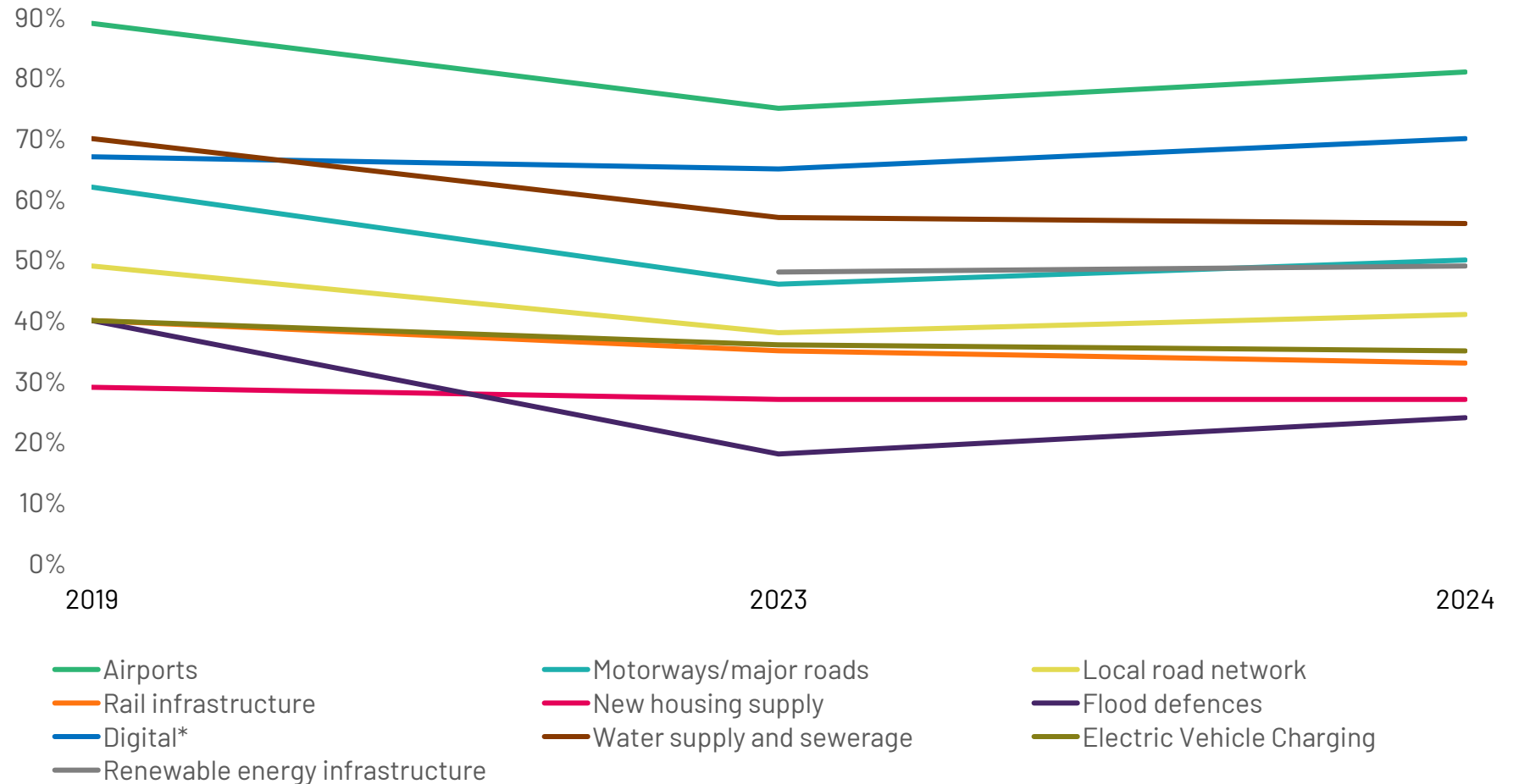
Ratings of the quality of different types of infrastructure in New Zealand have declined since 2019 but improving slightly from 2023

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 New Zealand.

Base: New Zealand – Nov '19 (n=561), May-Jun '23 (n=1,004), May-Jun '24 (n=1,001)

% very/fairly good



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



ATTITUDES

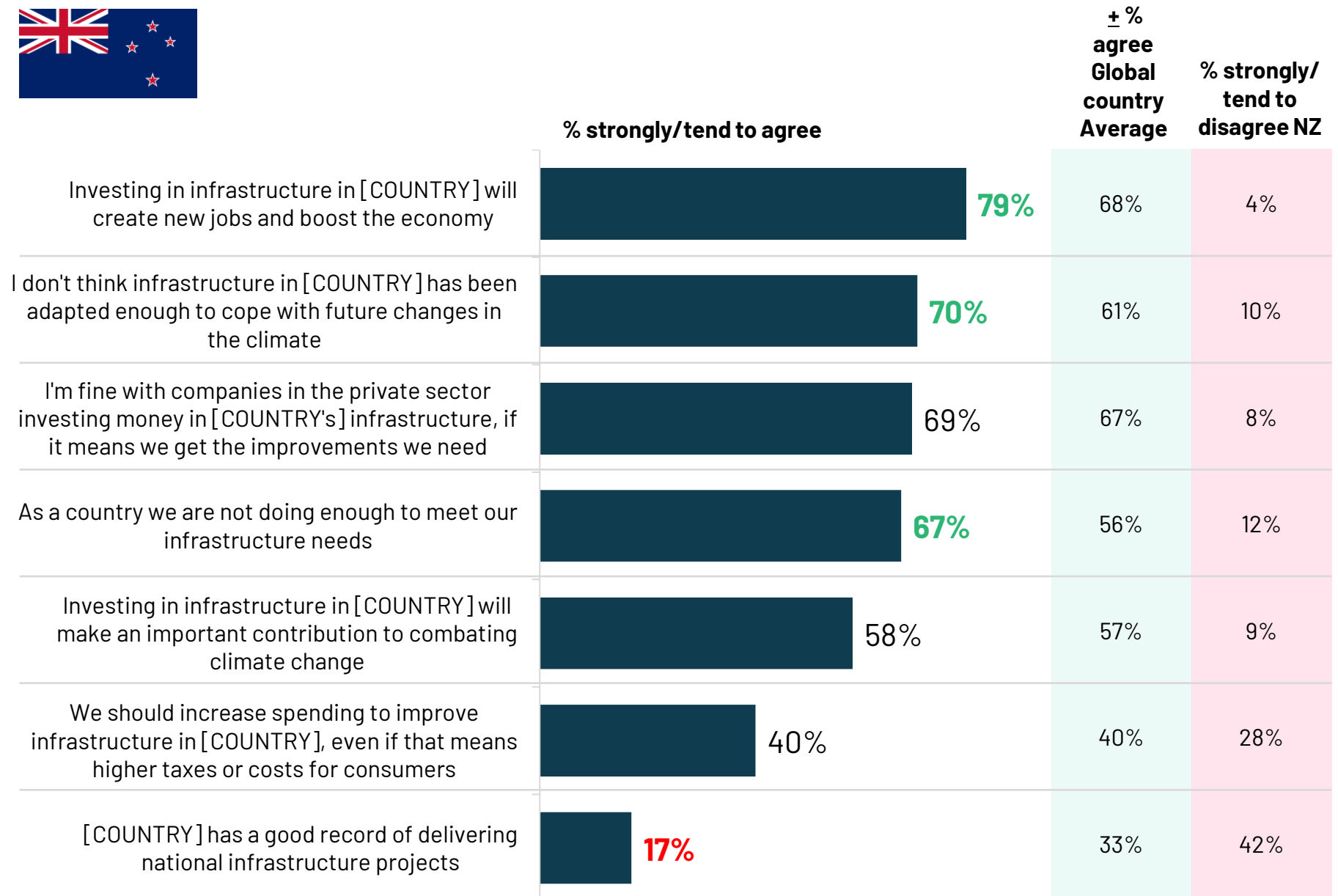


Attitudes towards infrastructure



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: New Zealand (n=1,001), Global (n=23,530)
May – Jun '24 / New Zealand (n=1,004) May – Jun '23



green / red indicates significantly higher / lower compared to the Global Average

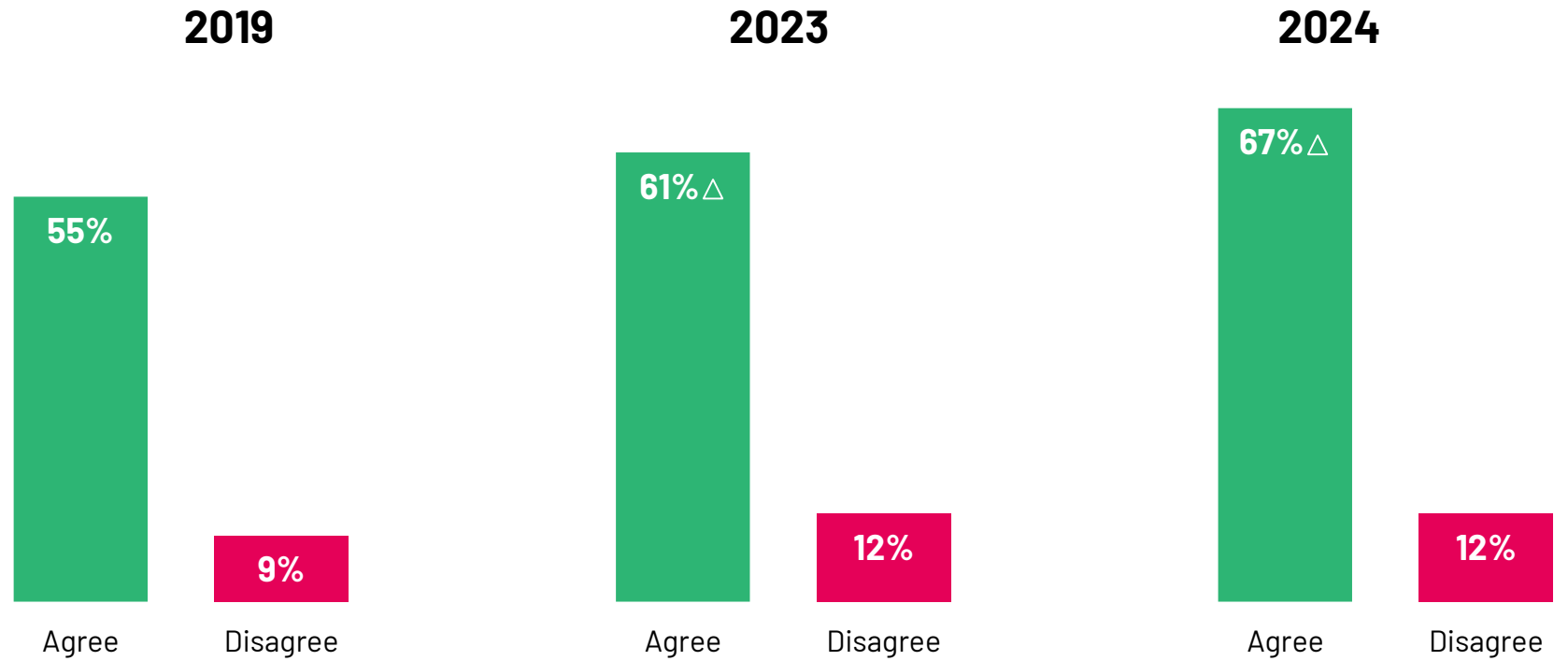


New Zealanders are increasingly concerned that we are not doing enough to meet our infrastructure needs

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”

Base: New Zealand – Nov '19 (n=561), May-Jun '23 (n=1,004), May-Jun '24 (n=1,001)



▲ / ▼ indicates significantly higher / lower compared to previous survey



In contrast, the sentiment that 'we're not doing enough' has remained flat globally over time

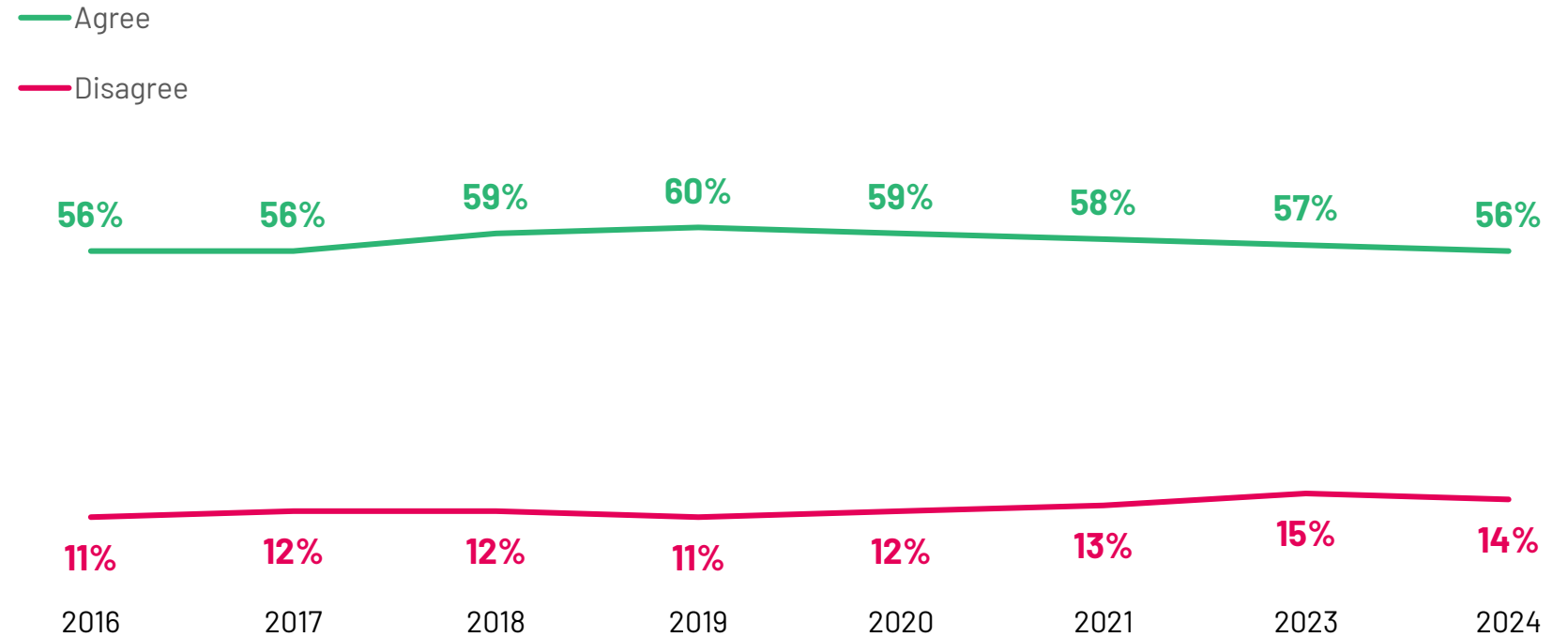
Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...

“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



PRIORITIES



The top infrastructure priority in New Zealand in 2024 is new housing supply.

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

Base: New Zealand (n=1,001), Global (n=23,530)
May - Jun '24 / New Zealand (n=1,004) May - Jun '23



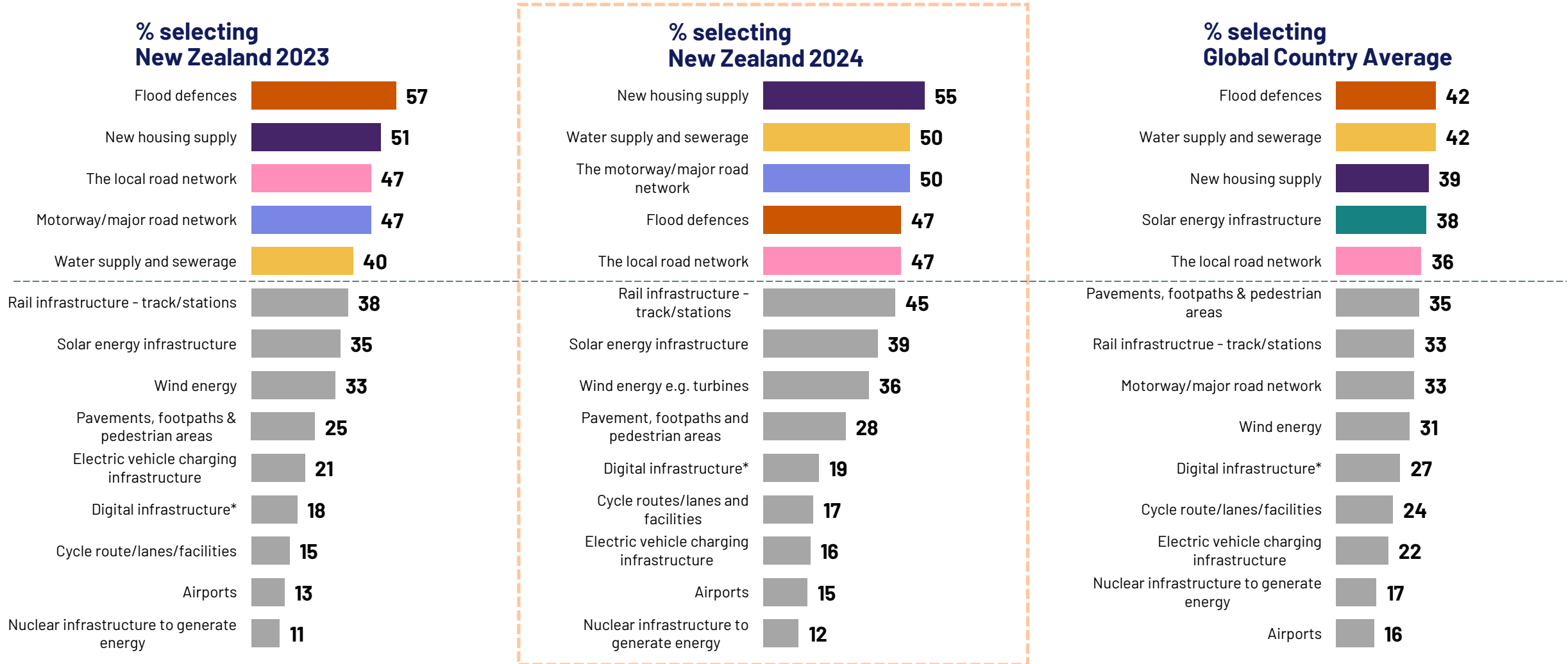
	% selecting	% selecting Global Average	% selecting NZ 2023
New housing supply	55%	39%	51%
Water supply and sewerage	50%▲	42%	40%
The motorway/major road network	50%	33%	47%
Flood defences	47%▼	42%	57%
The local road network	47%	36%	47%
Rail infrastructure - track/stations	45%▲	33%	38%
Solar energy infrastructure	39%	38%	35%
Wind energy e.g. turbines	36%	31%	33%
Pavement, footpaths and pedestrian areas	28%	35%	25%
Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G	19%	27%	18%
Cycle routes/lanes and facilities	17%	24%	15%
Electric vehicle charging infrastructure	16%▼	22%	21%
Airports	15%	16%	13%
Nuclear infrastructure to generate energy	12%	17%	11%
Other	3%	2%	-
Don't know	3%	5%	-
None of these	1%	1%	-

green / red indicates significantly higher / lower compared to the Global Average
▲ / ▼ indicates significantly higher / lower compared to New Zealand's 2023 result



While New Zealanders' top 5 priority infrastructure types for investment remain unchanged since 2023, the order of the priorities have changed.

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: New Zealand May-June 2023 (n=1,004), New Zealand May - Jun 2024 (n=1,001), Global May-Jun '24 (n=23,530)

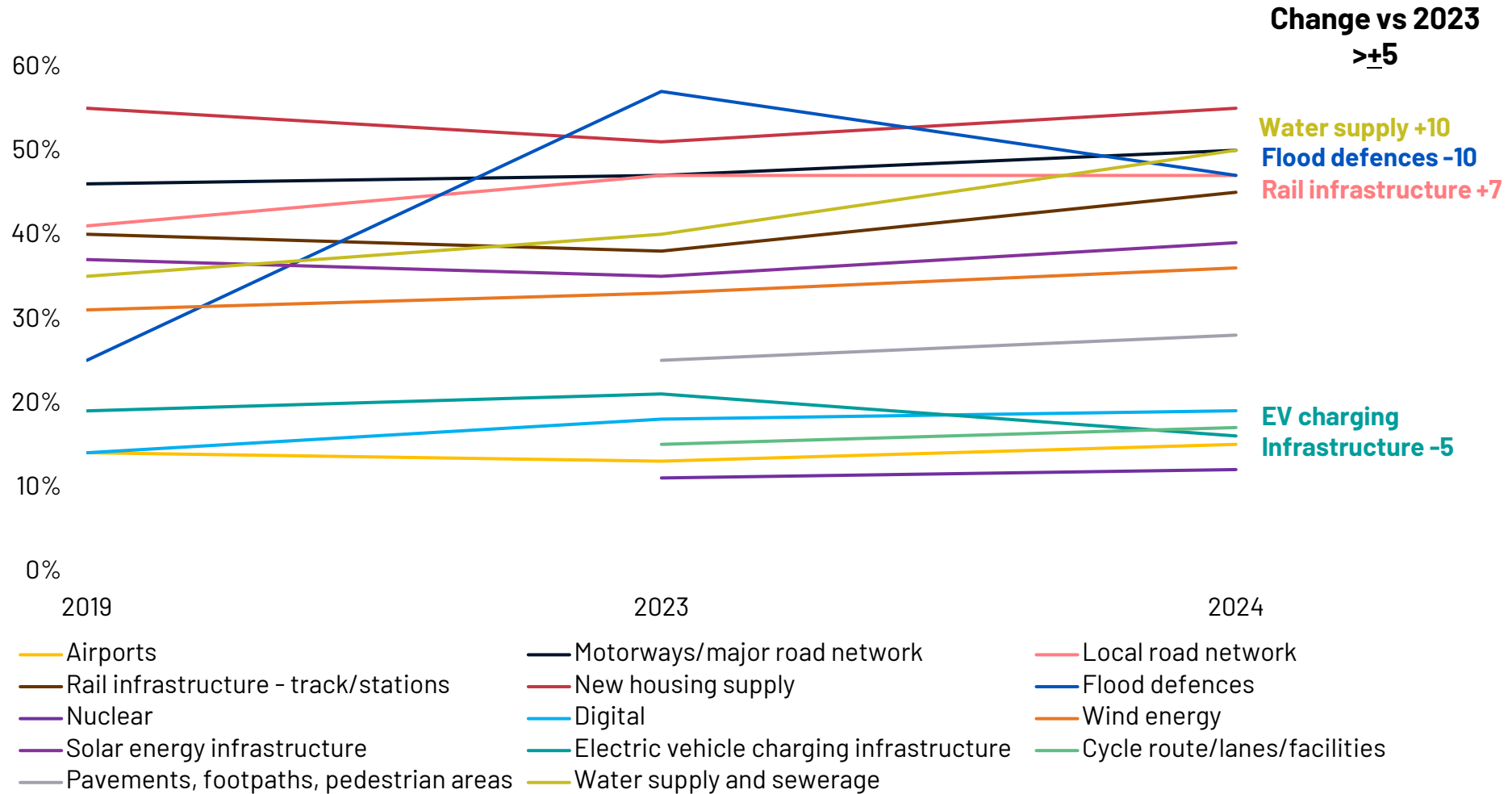
In New Zealand, there has been a significant decrease in priority for investment for flood defences compared to 2023.

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

Base: New Zealand – Nov '19 (n=561), May-Jun '23 (n=1,004), May-Jun '24 (n=1,001)



% selecting



APPENDIX



Rating - Airports

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

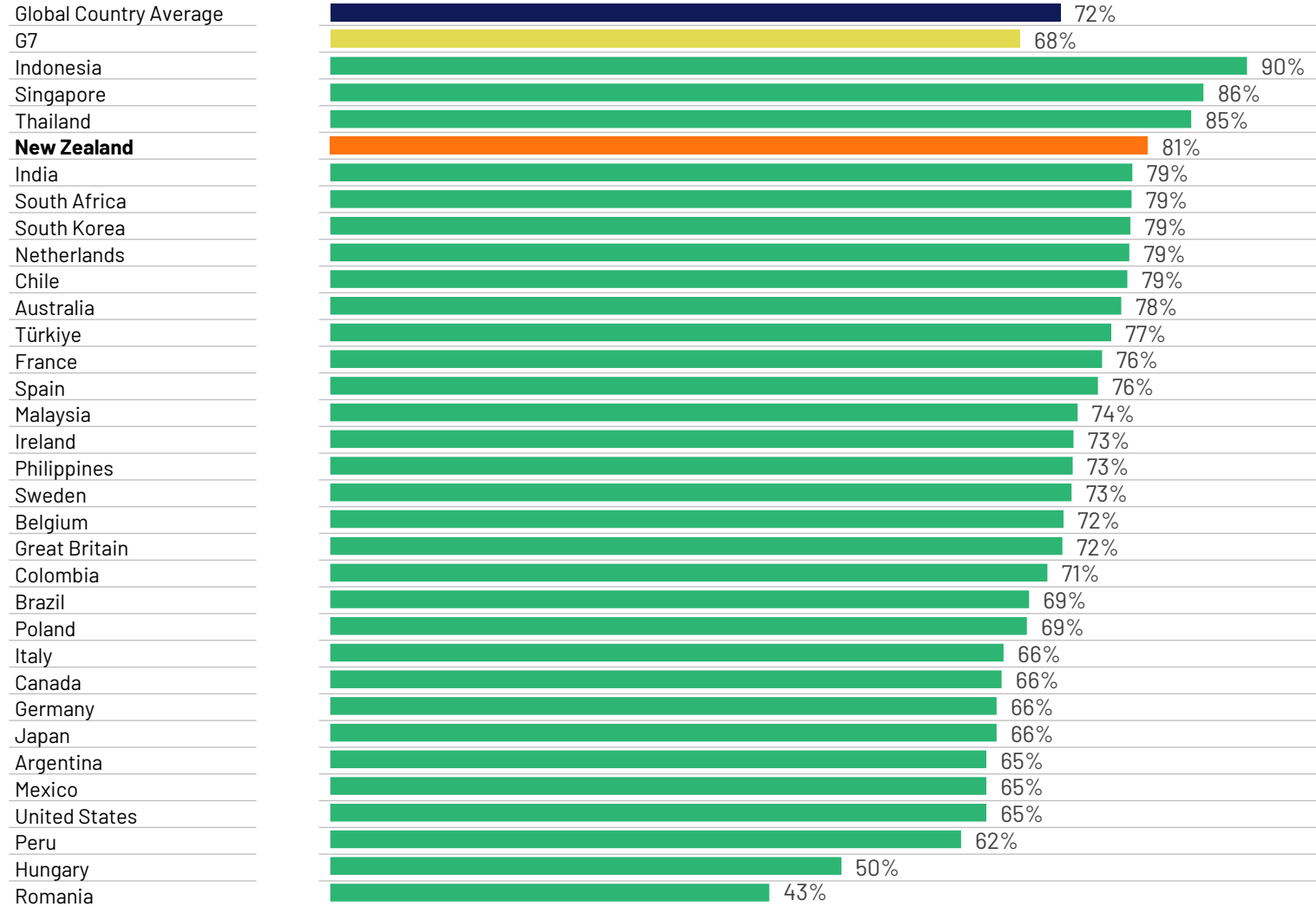
Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Airports

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

Country

% very/fairly good



Rating – 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]...

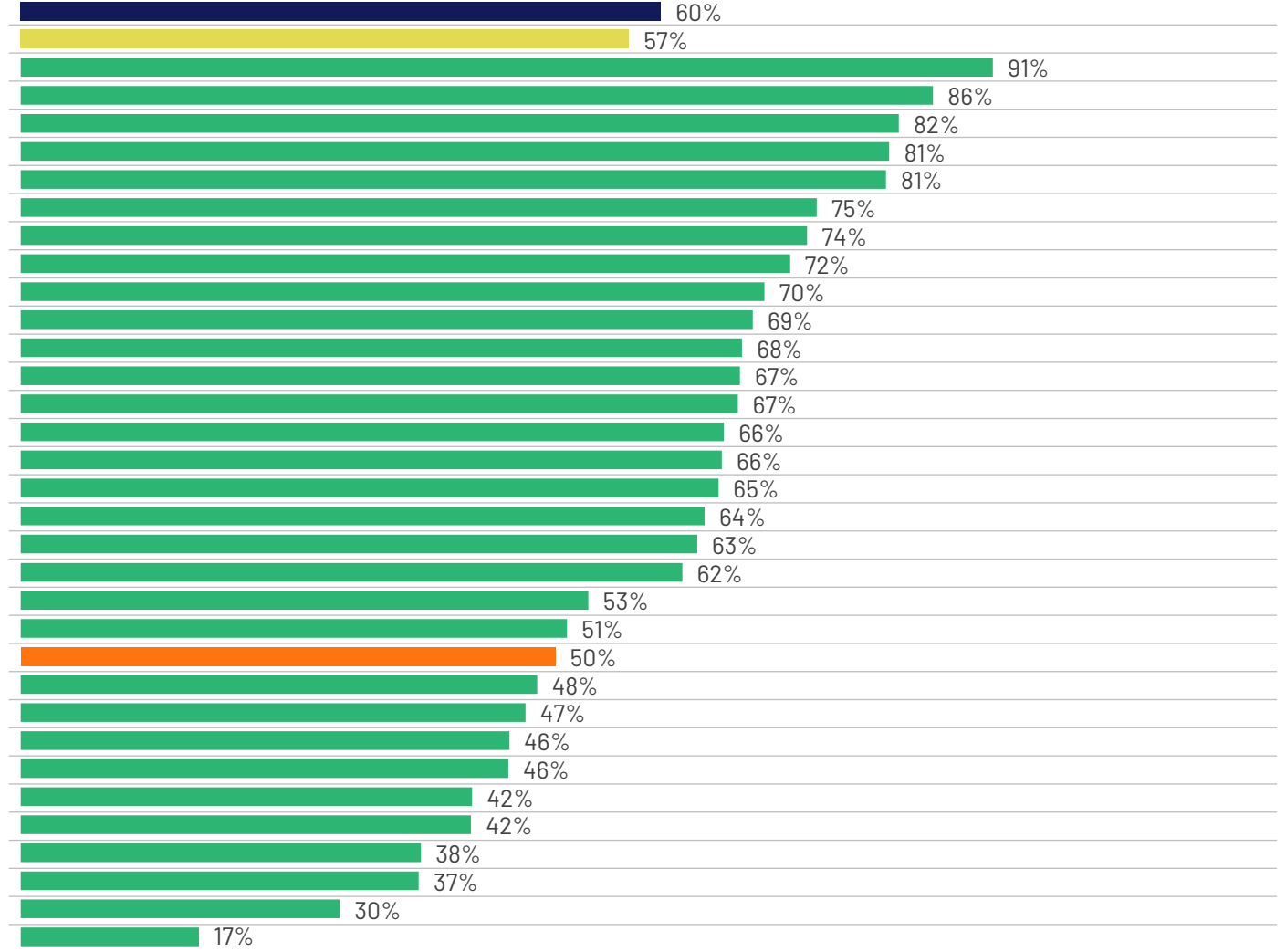
The motorway/major road network

Base: n=23,530 online adults across 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



Rating – Local road network

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

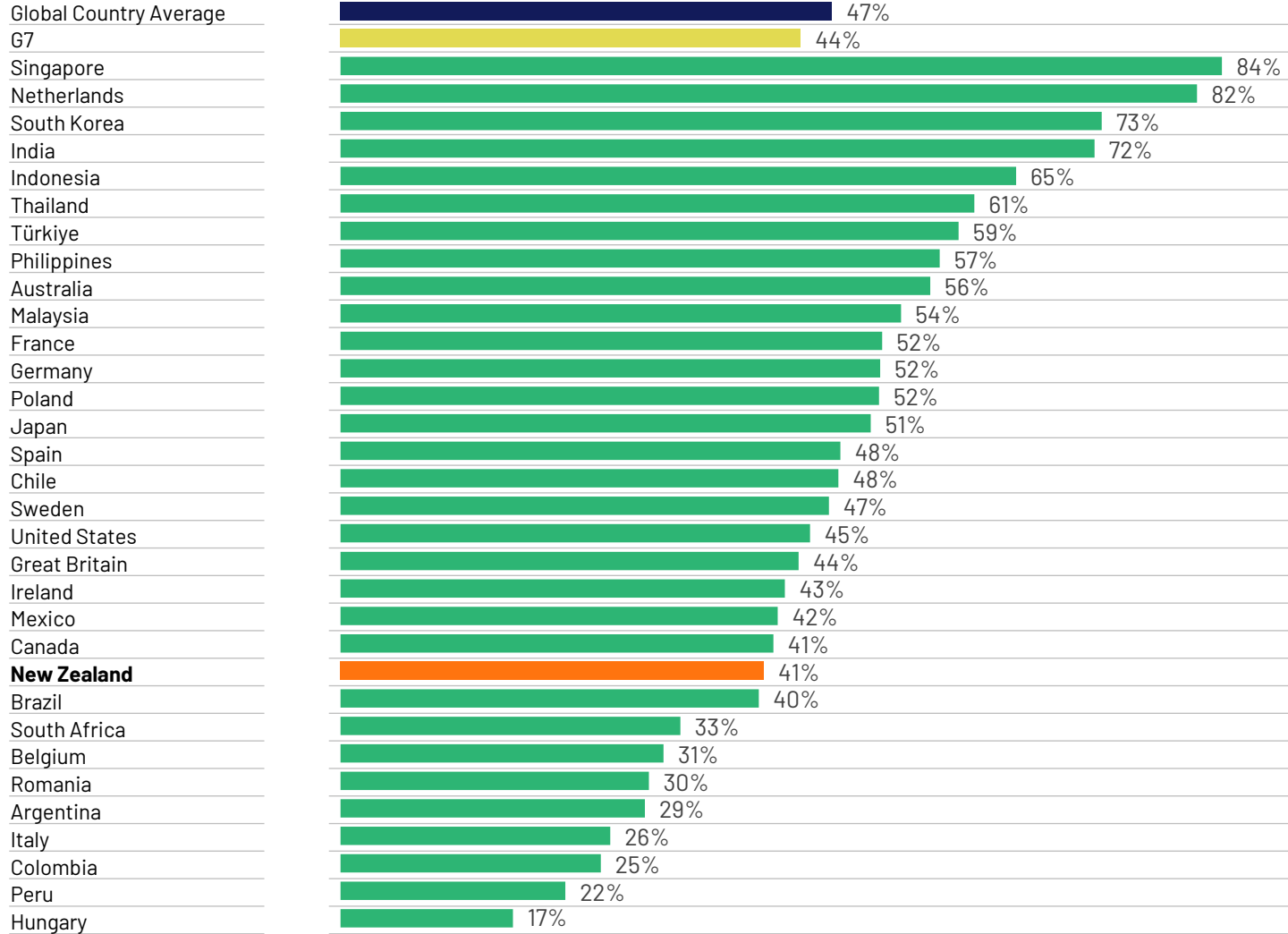
Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

The local road network

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

Country

% very/fairly good



Rating – 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]...

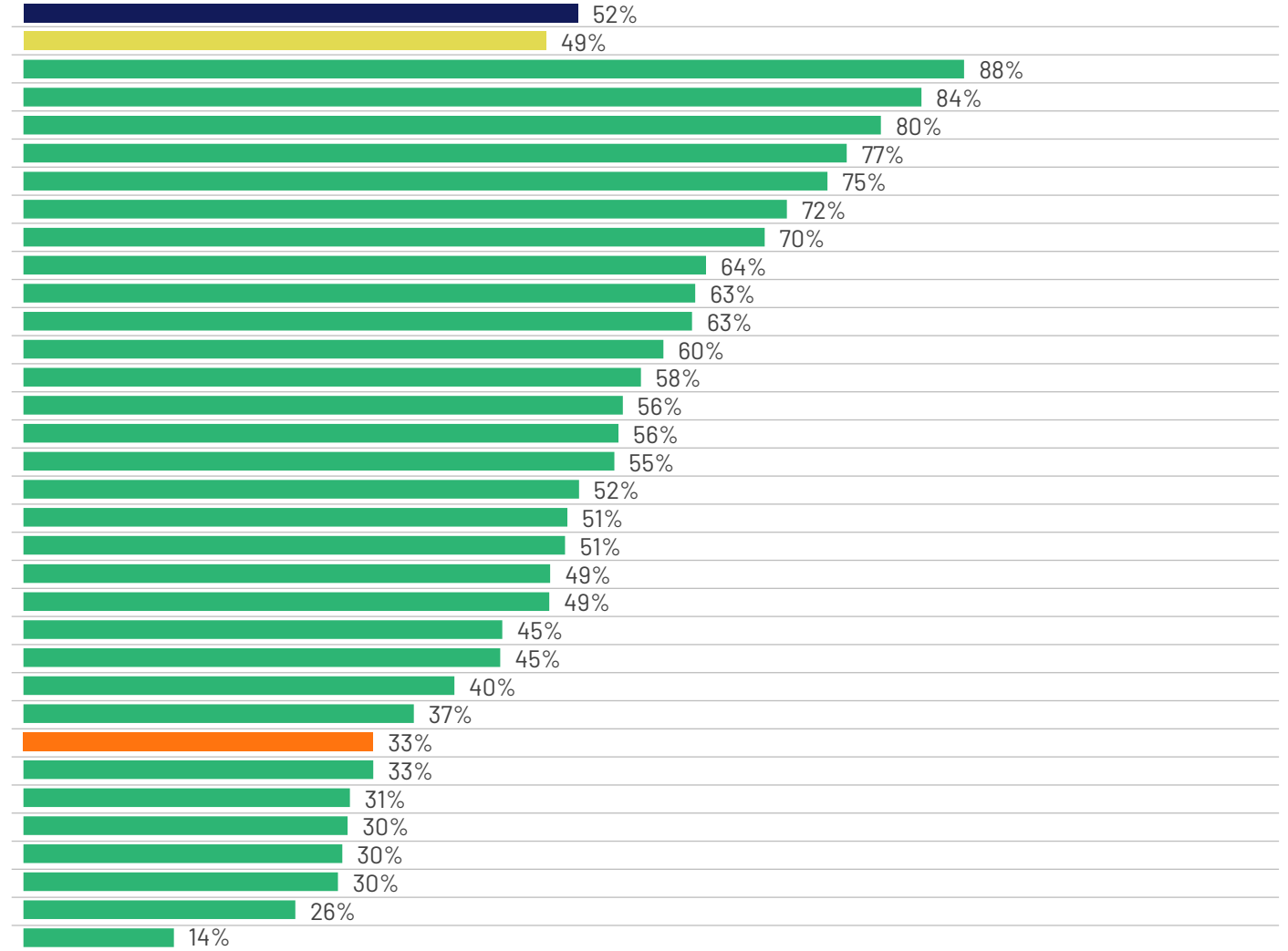
Rail infrastructure – track/stations

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

Country

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

% very/fairly good



Rating – New housing supply

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

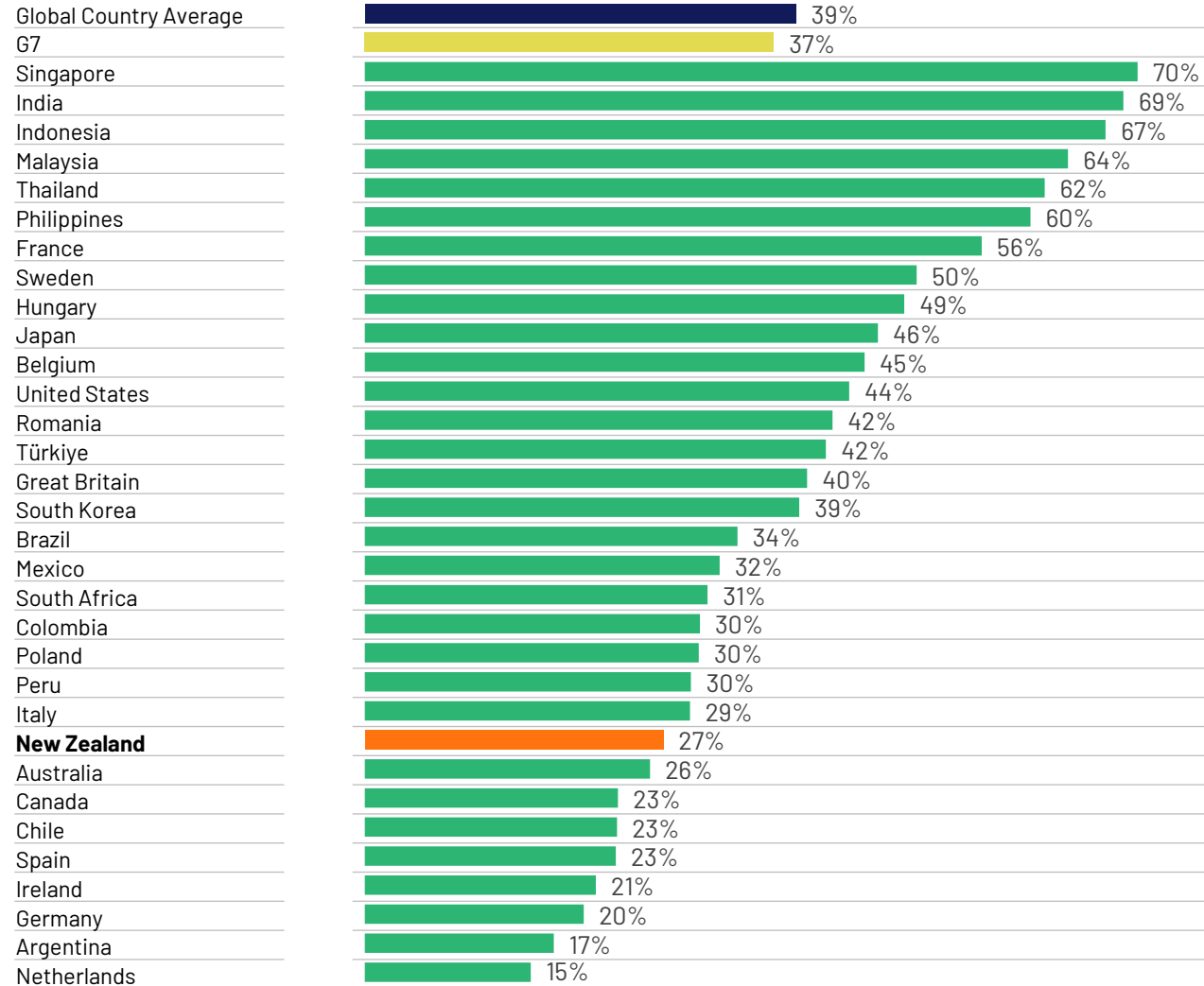
Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

New housing supply

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

Country

% very/fairly good



Rating – Flood defences

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

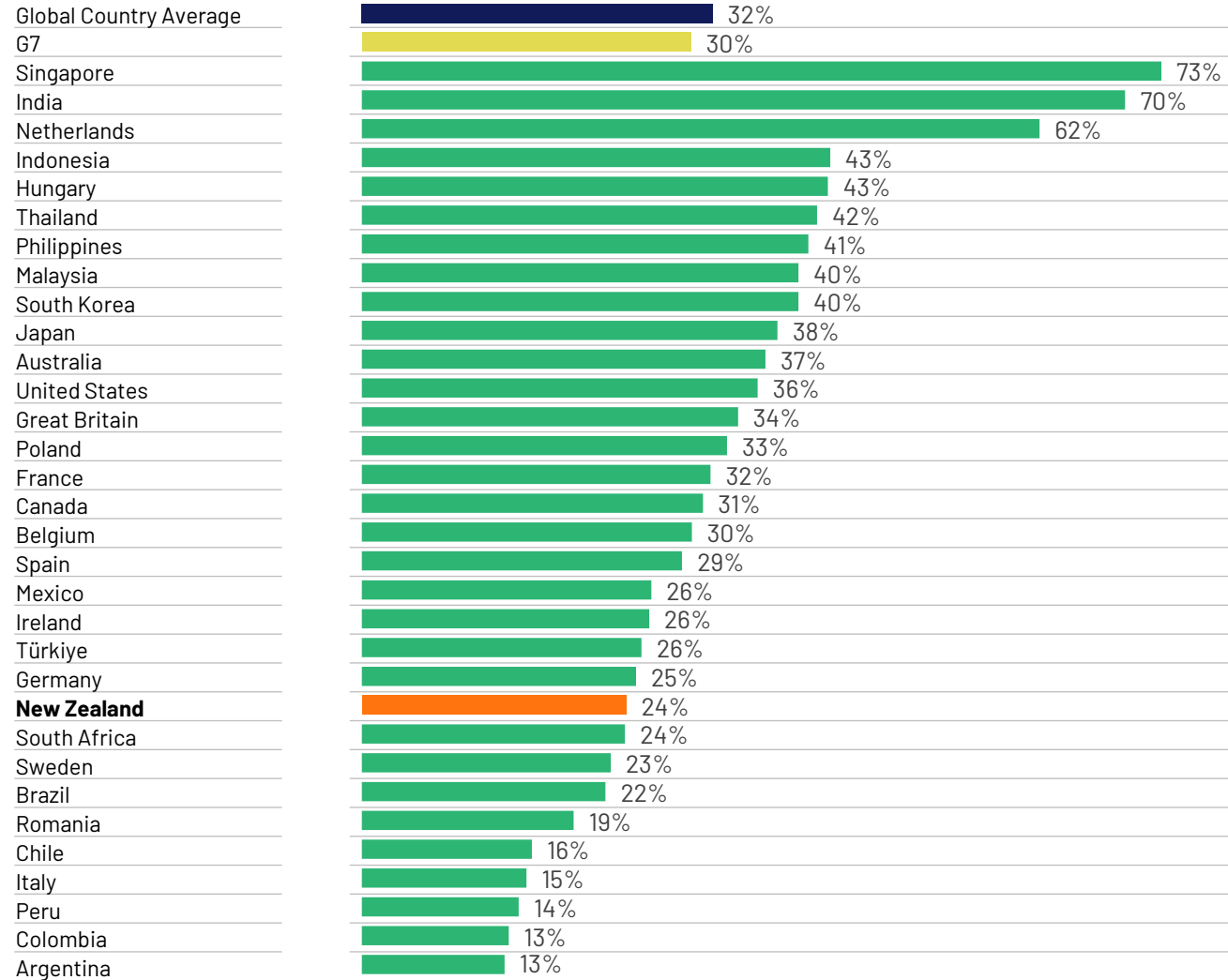
Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Flood defences

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

Country

% very/fairly good



Rating – 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: n=23,530 online adults across 32 countries (May-June 2024)

Country

Global Country Average

G7

Singapore

Netherlands

Indonesia

India

France

Sweden

New Zealand

South Korea

Thailand

Spain

Great Britain

Poland

Romania

Chile

Hungary

Belgium

Mexico

Philippines

United States

Ireland

Brazil

South Africa

Australia

Malaysia

Canada

Japan

Italy

Türkiye

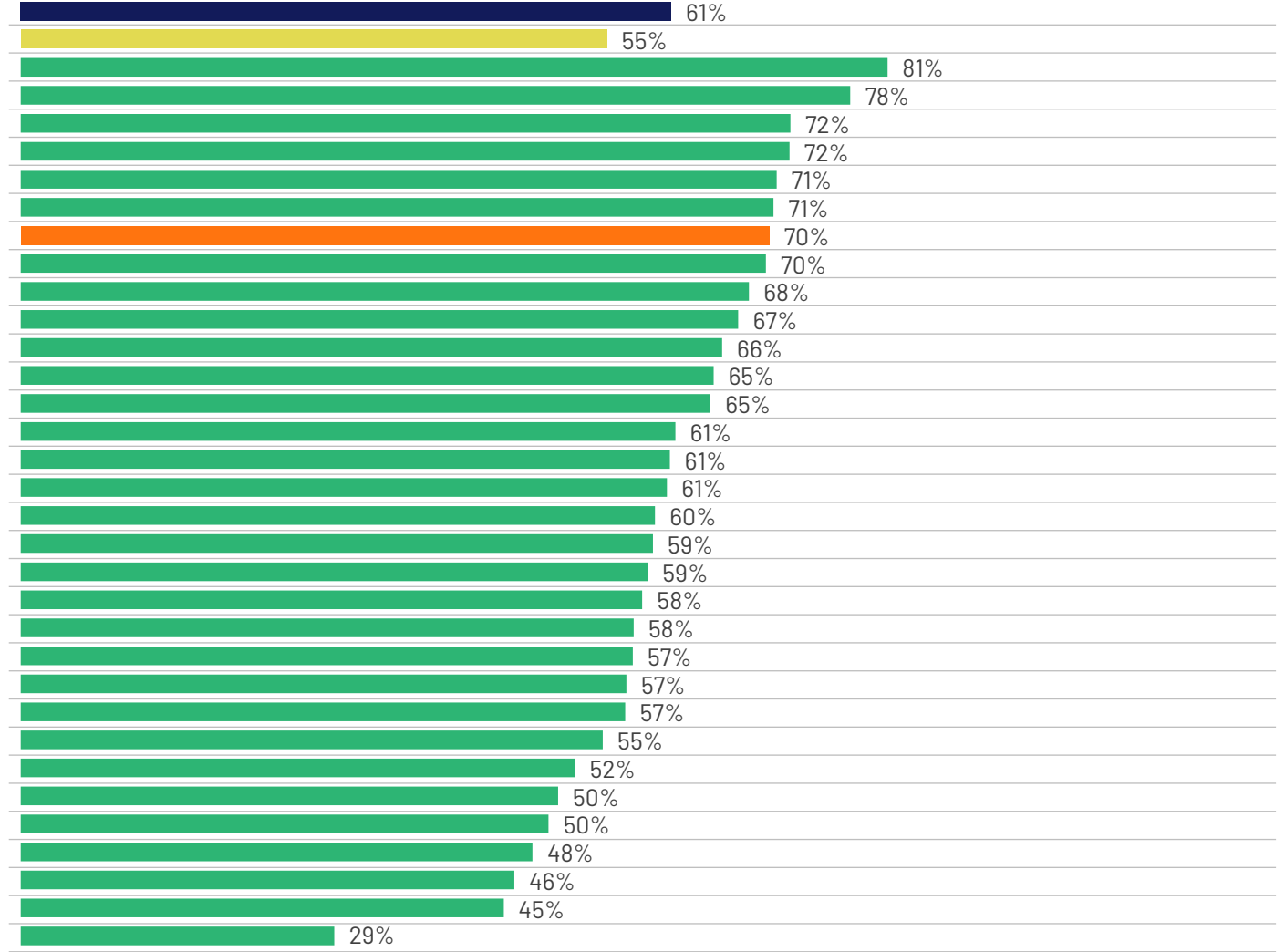
Colombia

Argentina

Peru

Germany

% very/fairly good



Rating – 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]...

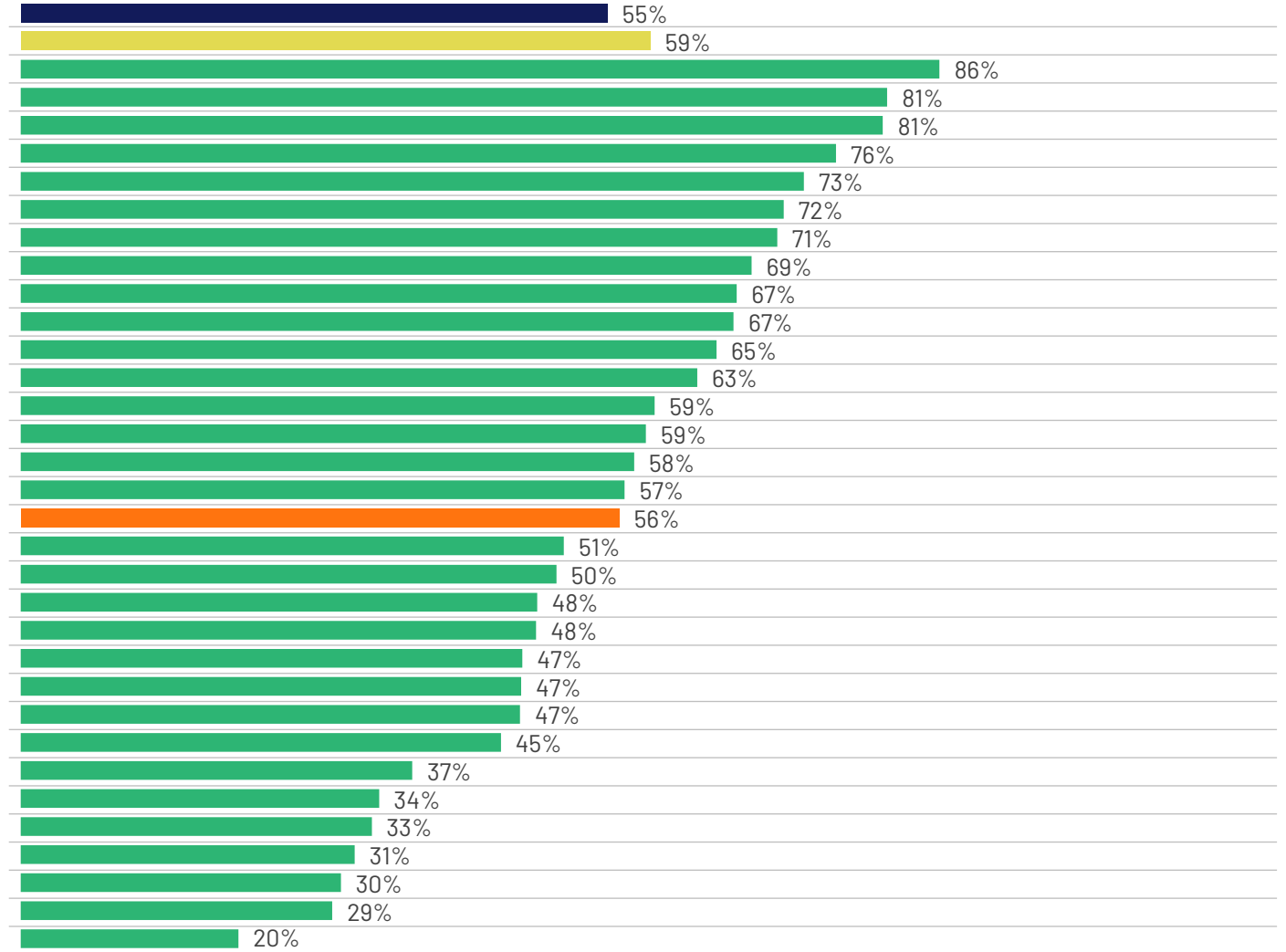
Water supply/sewerage

Base: n=23,530 online adults across 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



Rating – 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: n=23,530 online adults across 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%

Rating – 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: n=23,530 online adults across 32 countries (May-June 2024)

Country

Global Country Average

G7

India

Singapore

Indonesia

Philippines

Thailand

Netherlands

Malaysia

Türkiye

France

Great Britain

New Zealand

Australia

Brazil

Canada

Sweden

South Korea

United States

Belgium

Chile

Ireland

Mexico

Spain

Hungary

Germany

Italy

South Africa

Romania

Poland

Colombia

Japan

Peru

Argentina

% very/fairly good

Global Country Average 36%

G7 30%

India 69%

Singapore 68%

Indonesia 67%

Philippines 59%

Thailand 56%

Netherlands 51%

Malaysia 49%

Türkiye 39%

France 37%

Great Britain 36%

New Zealand 35%

Australia 35%

Brazil 33%

Canada 33%

Sweden 33%

South Korea 33%

United States 33%

Belgium 31%

Chile 31%

Ireland 30%

Mexico 30%

Spain 27%

Hungary 27%

Germany 26%

Italy 25%

South Africa 25%

Romania 24%

Poland 24%

Colombia 21%

Japan 20%

Peru 18%

Argentina 16%

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...?

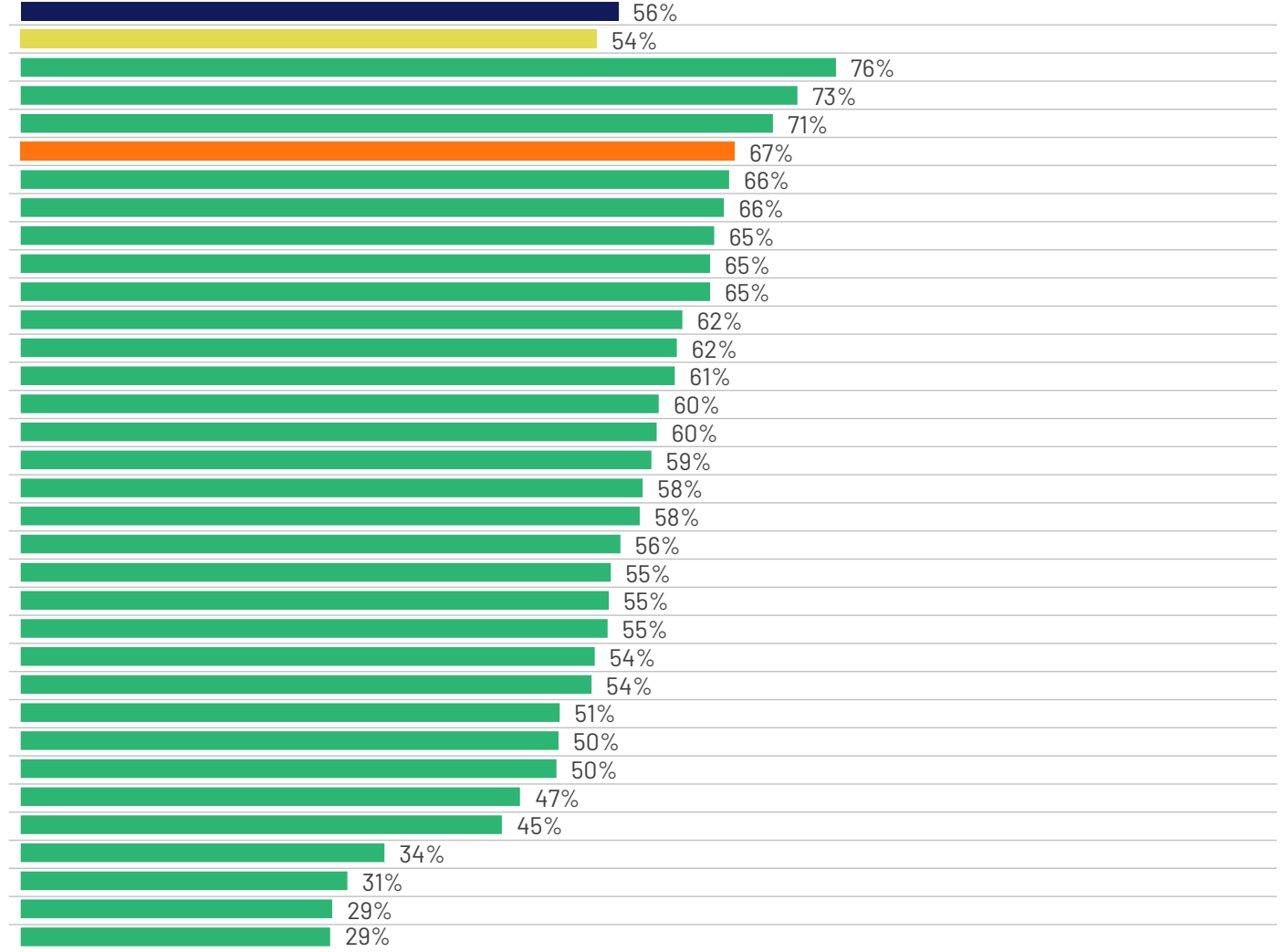
“As a country we are not doing enough to meet our infrastructure needs”

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

Country

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

% strongly/tend to agree



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...?

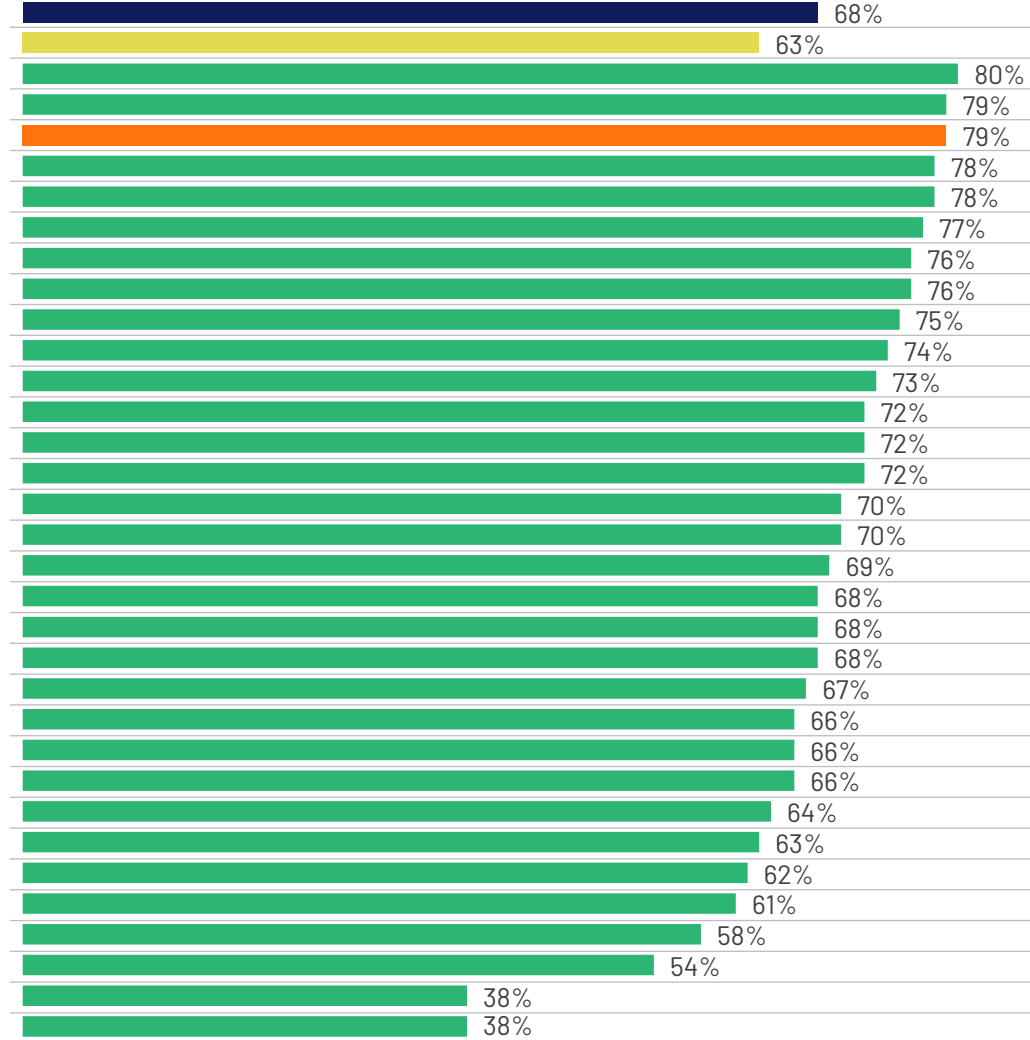
“Investing in infrastructure will create new jobs and boost the economy”

Base: n=23,530 online adults across 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...?

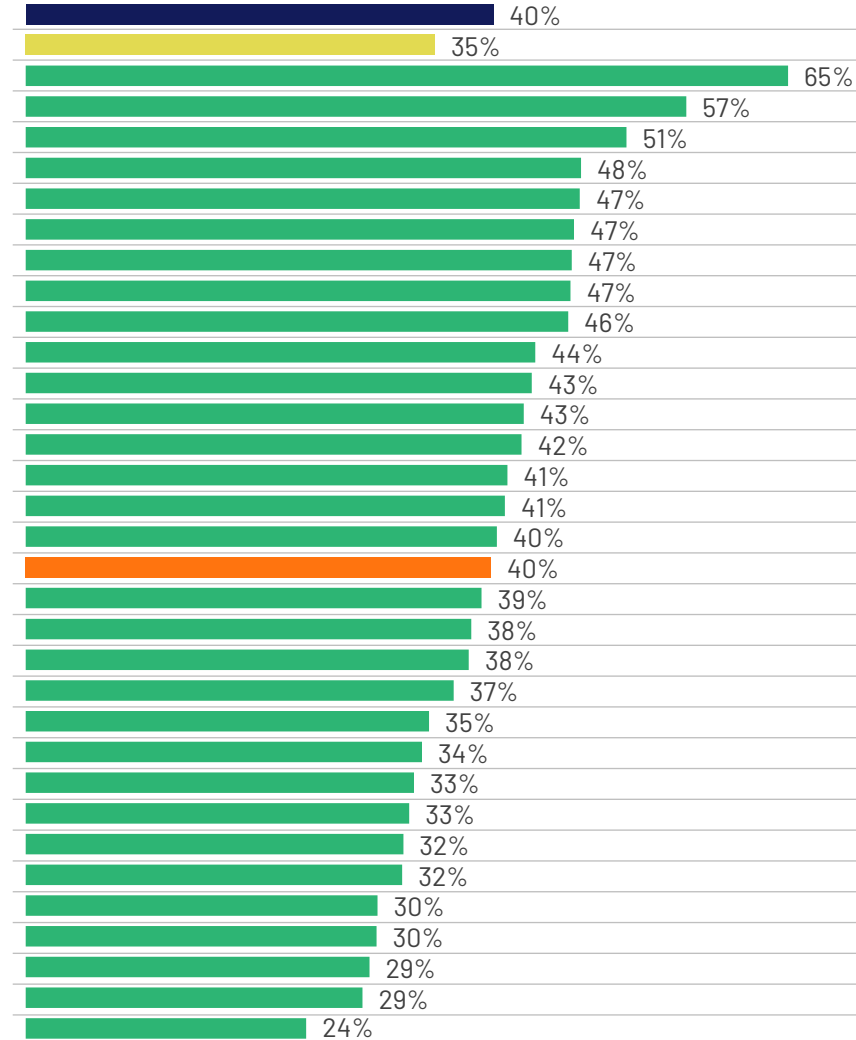
“We should increase spending to improve infrastructure in [COUNTRY], even if that means higher taxes or costs for consumers”

Base: n=23,530 online adults across 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



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

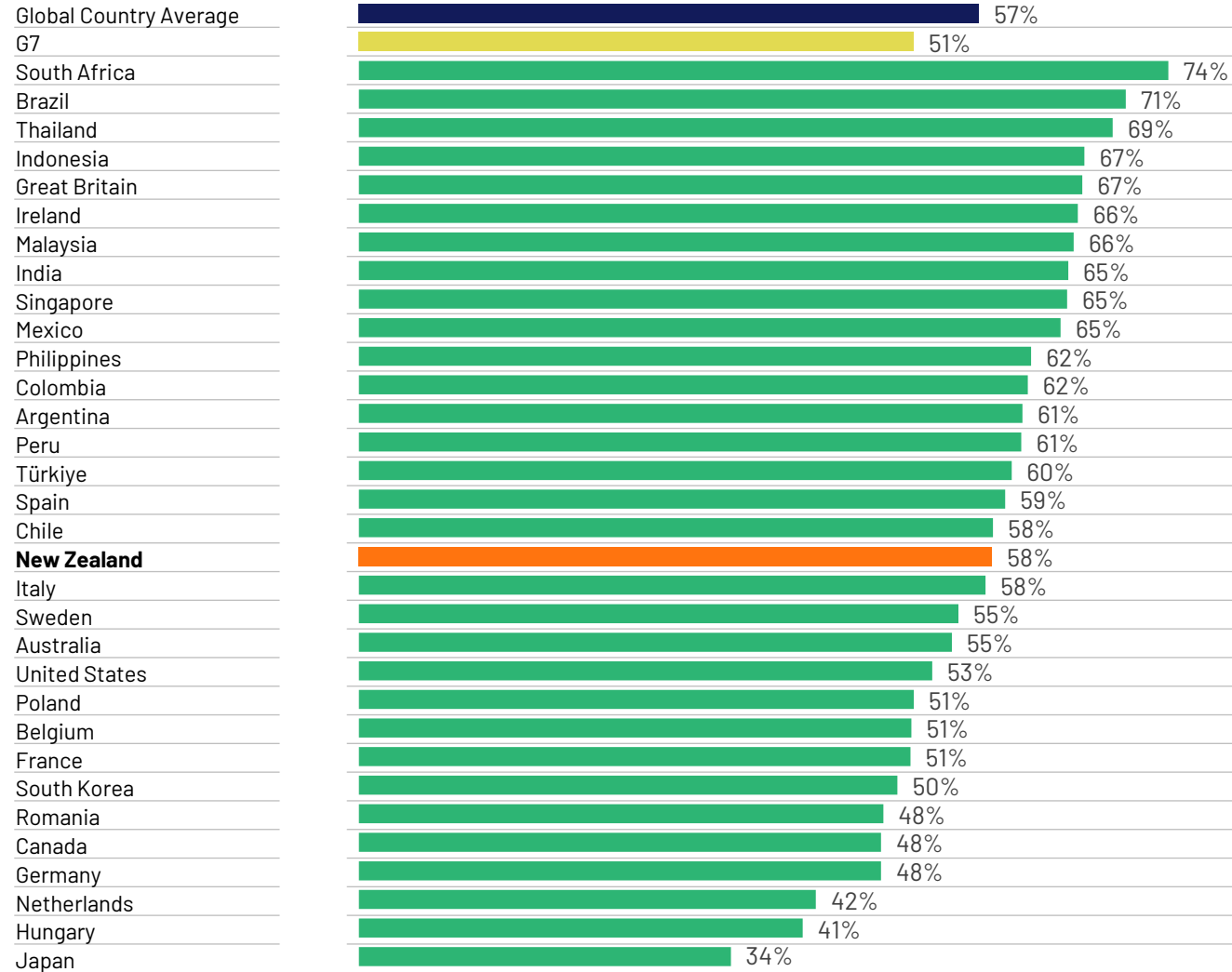
Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

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

Base: n=23,530 online adults across 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...?

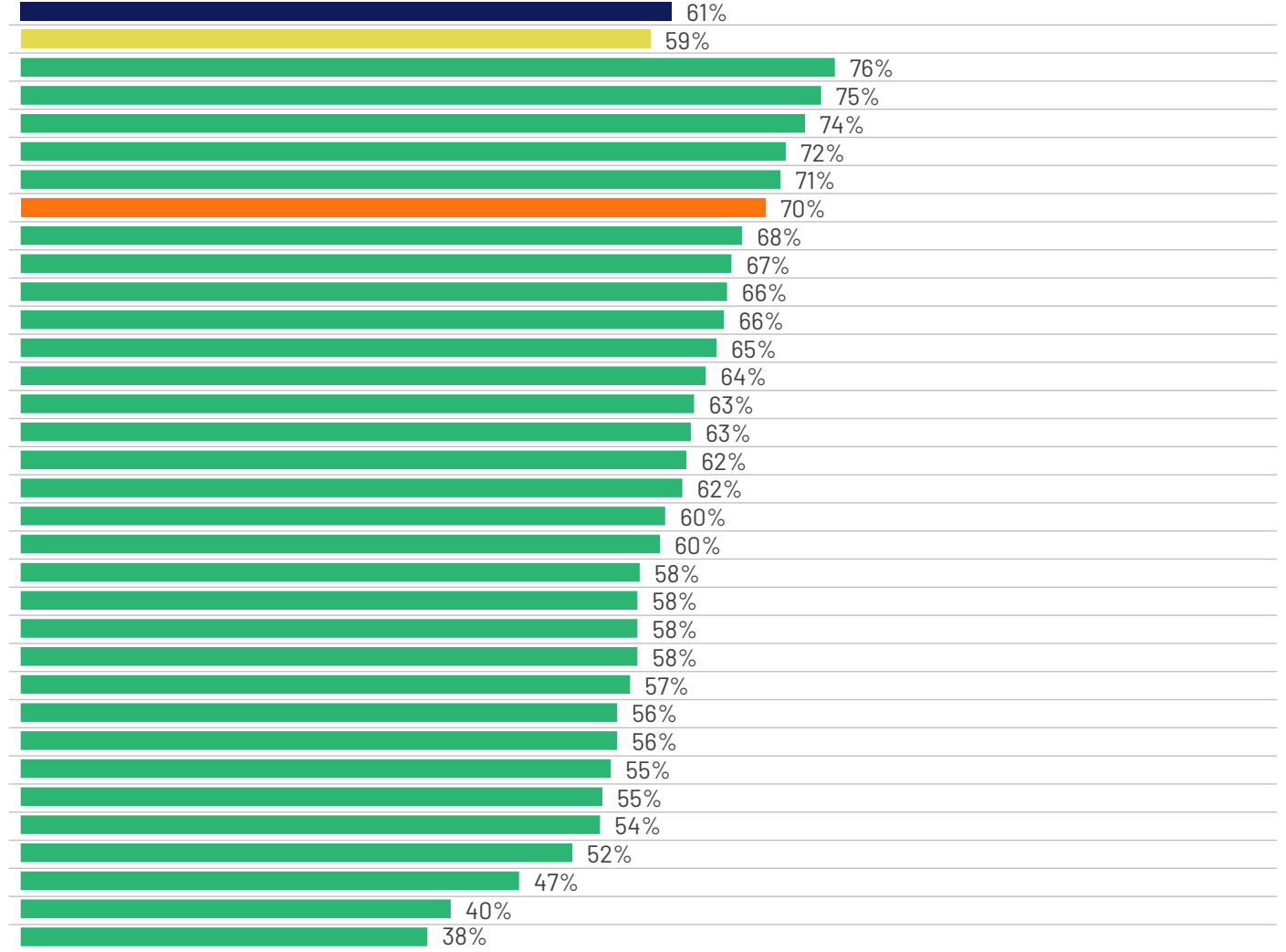
“I don’t think infrastructure in [COUNTRY] has been adapted enough to cope with future changes in the climate”

Base: n=23,530 online adults across 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: n=23,530 online adults across 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

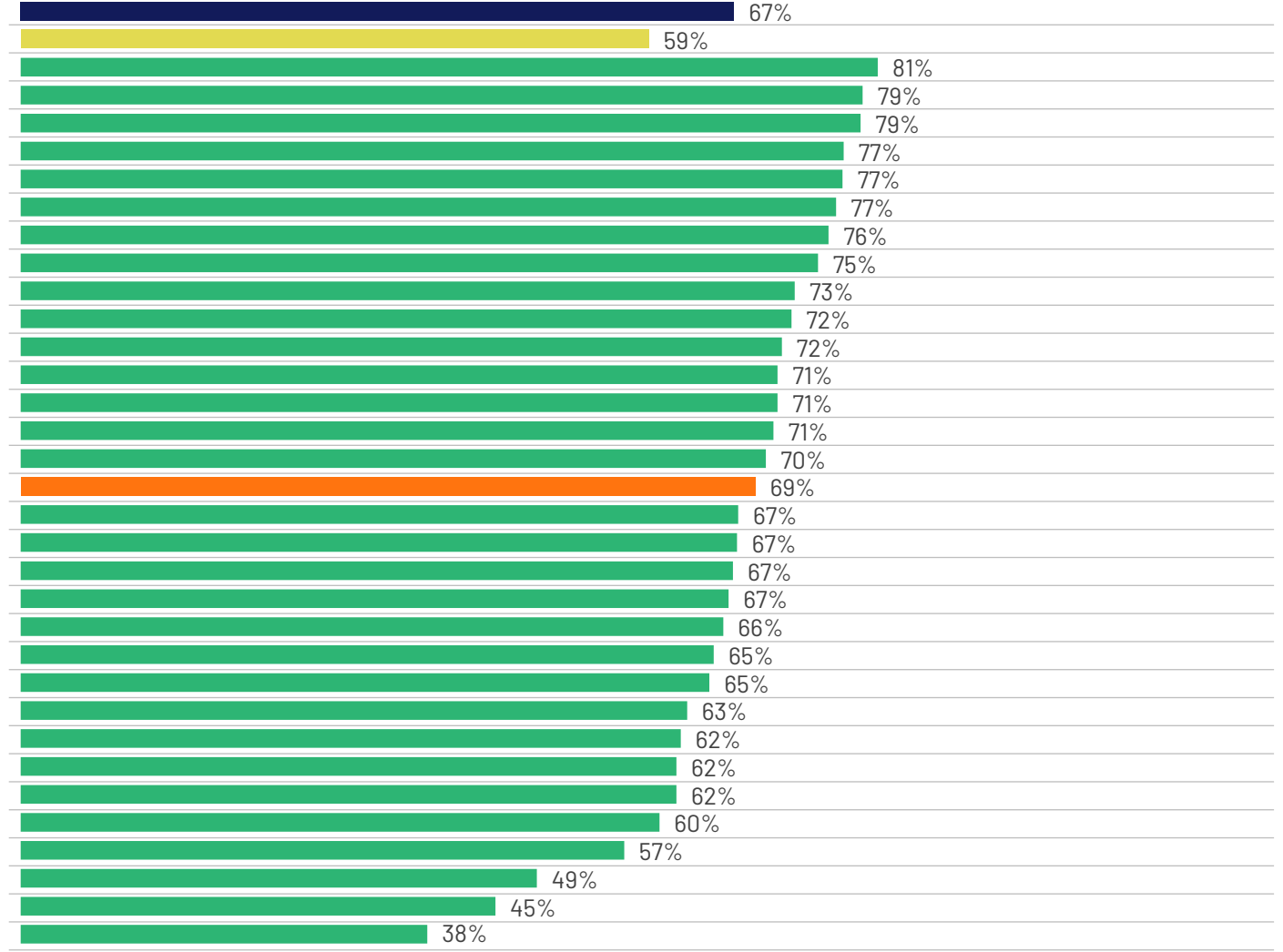
Germany

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

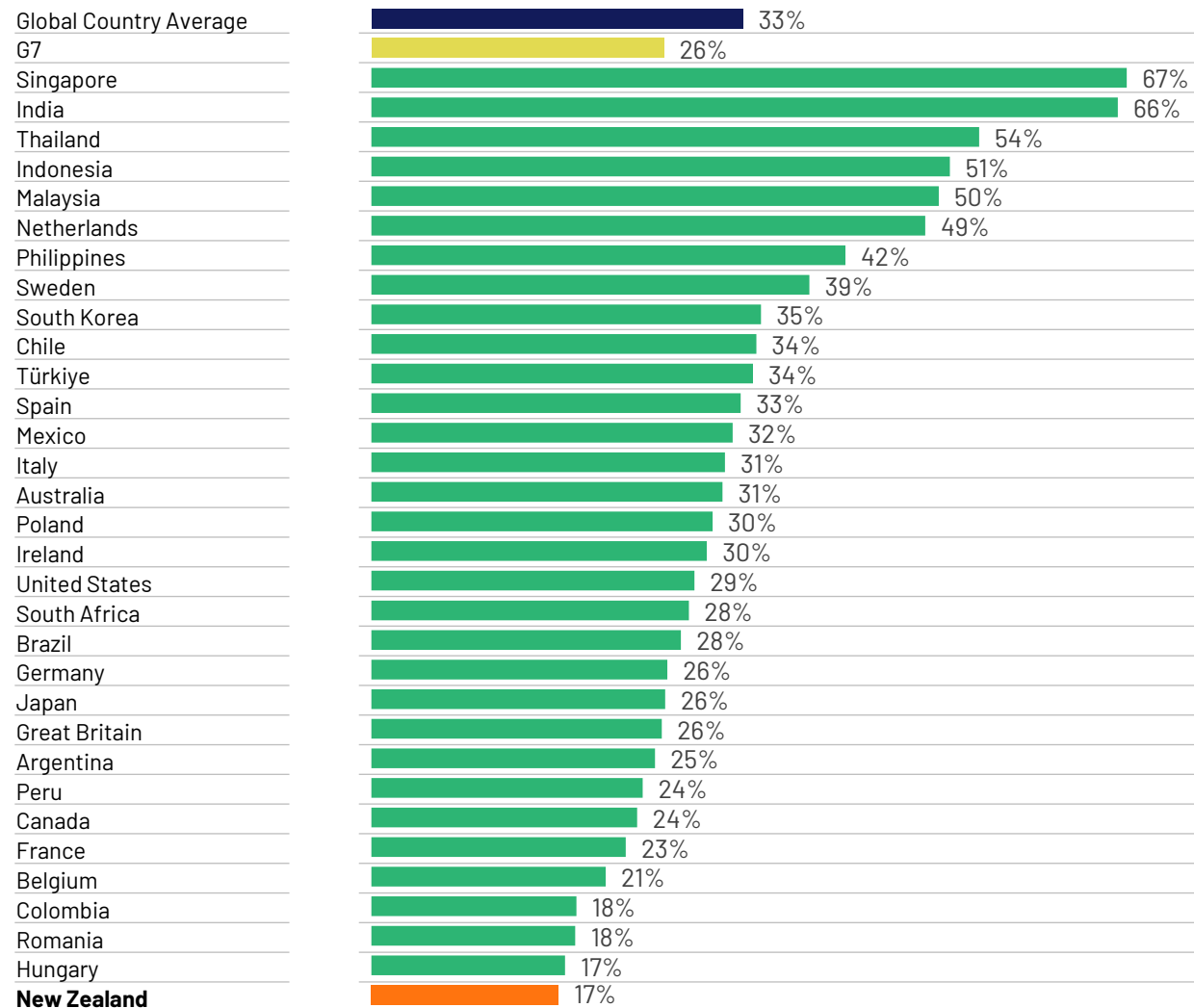
Q. Still thinking about infrastructure – the things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications – to what extent do you agree or disagree...?

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

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

Country

% strongly/tend to agree



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					



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