GLOBAL INFRASTRUCTURE INDEX 2024

32 country study, 24 May – 7 June 2024

Global Summary

In partnership with:

Global Infrastructure Investor Association
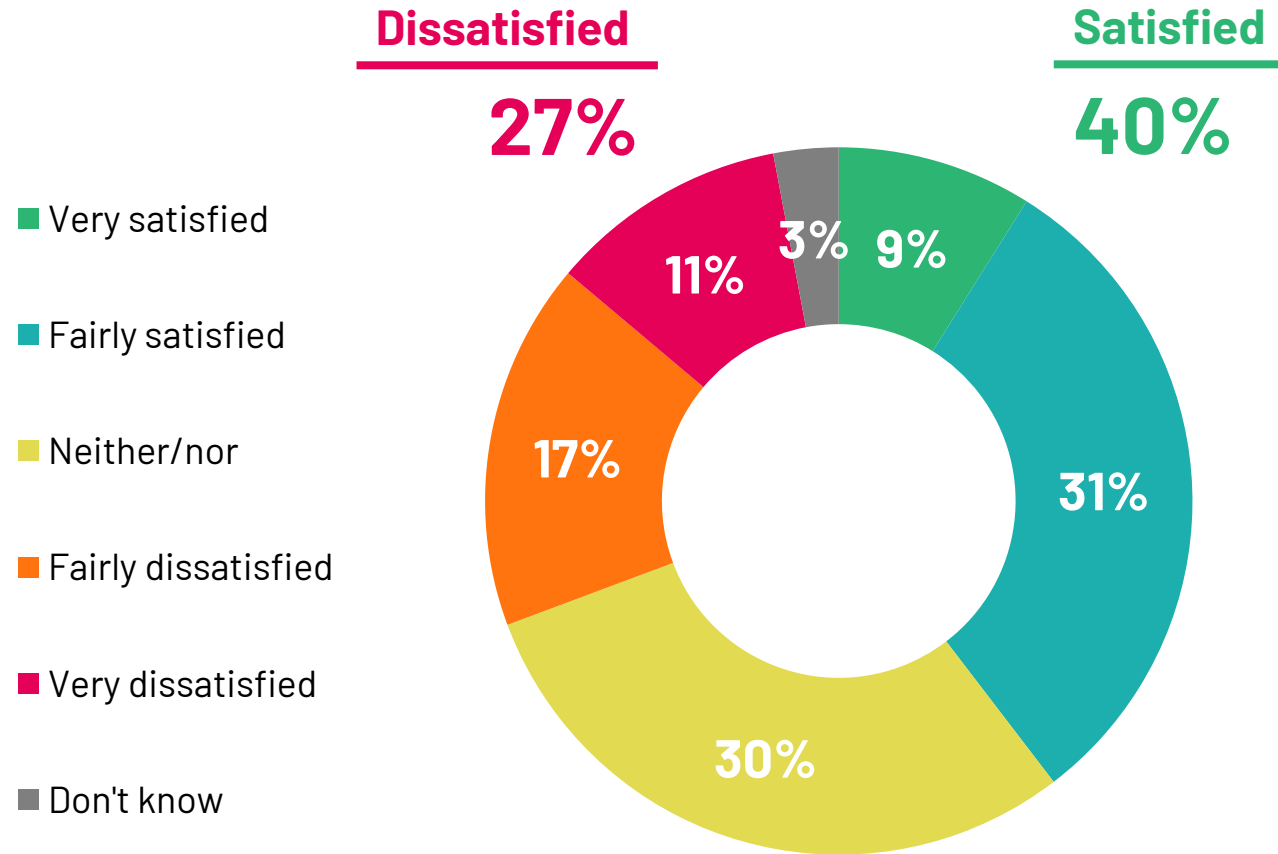
GIIA

Ipsos

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*

Dissatisfied
27%

Satisfied
40%

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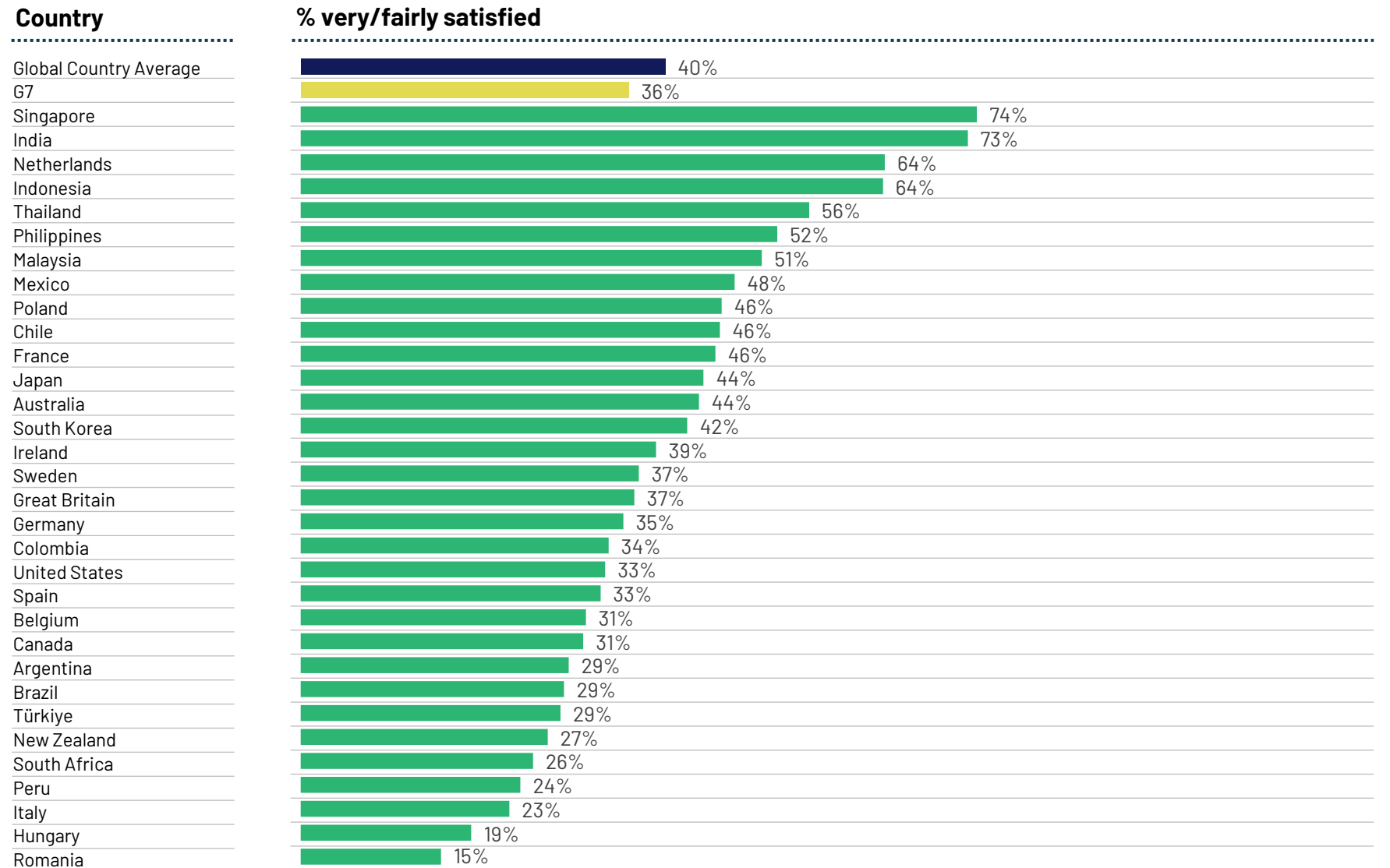- Very dissatisfied
- Don't know

3% 9%
11%
31%
17%
30%

* 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

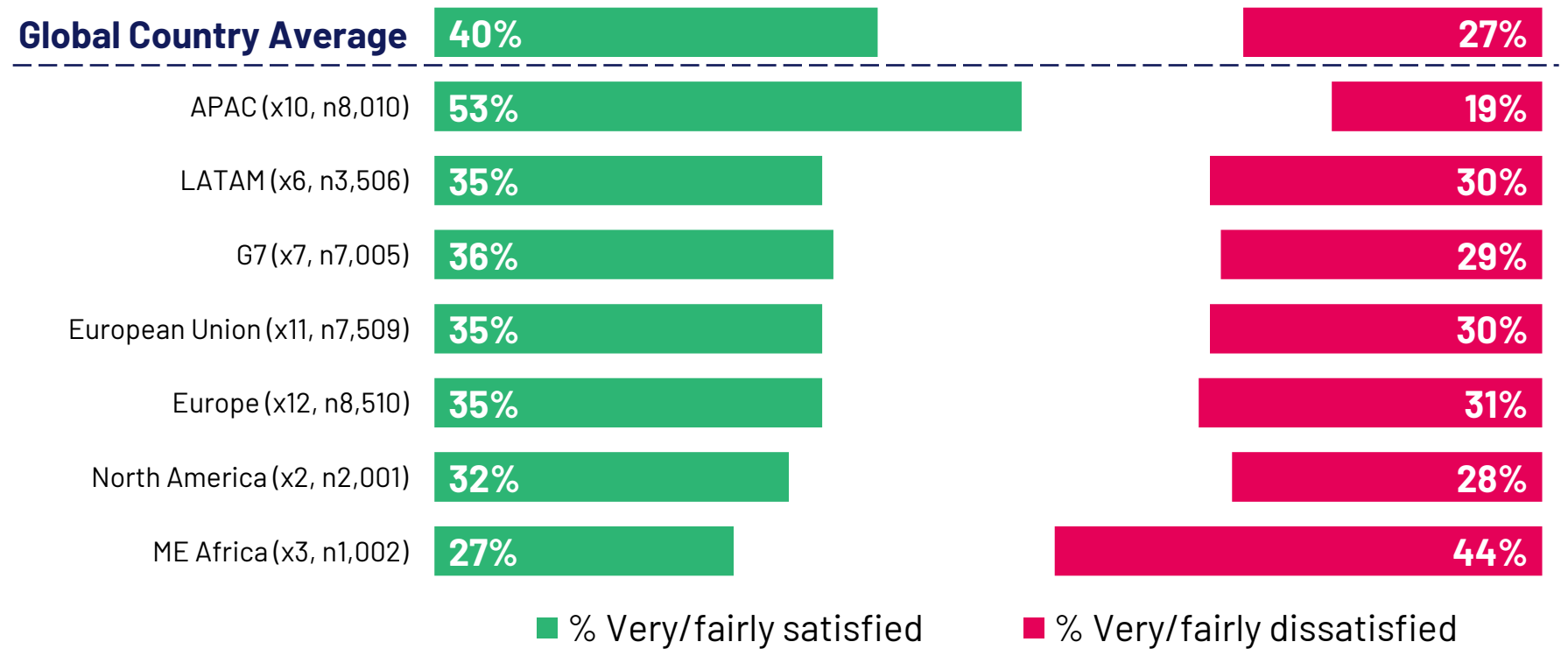| Country	% very/fairly satisfied
Global Country Average	40%
G7	36%
Singapore	74%
India	73%
Netherlands	64%
Indonesia	64%
Thailand	56%
Philippines	52%
Malaysia	51%
Mexico	48%
Poland	46%
Chile	46%
France	46%
Japan	44%
Australia	44%
South Korea	42%
Ireland	39%
Sweden	37%
Great Britain	37%
Germany	35%
Colombia	34%
United States	33%
Spain	33%
Belgium	31%
Canada	31%
Argentina	29%
Brazil	29%
Türkiye	29%
New Zealand	27%
South Africa	26%
Peru	24%
Italy	23%
Hungary	19%
Romania	15%

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

Region	% Very/fairly satisfied	% Very/fairly dissatisfied
Global Country Average	**40%**	**27%**
APAC (x10, n8,010)	53%	19%
LATAM (x6, n3,506)	35%	30%
G7 (x7, n7,005)	36%	29%
European Union (x11, n7,509)	35%	30%
Europe (x12, n8,510)	35%	31%
North America (x2, n2,001)	32%	28%
ME Africa (x3, n1,002)	27%	44%

■ % Very/fairly satisfied   ■ % Very/fairly dissatisfied

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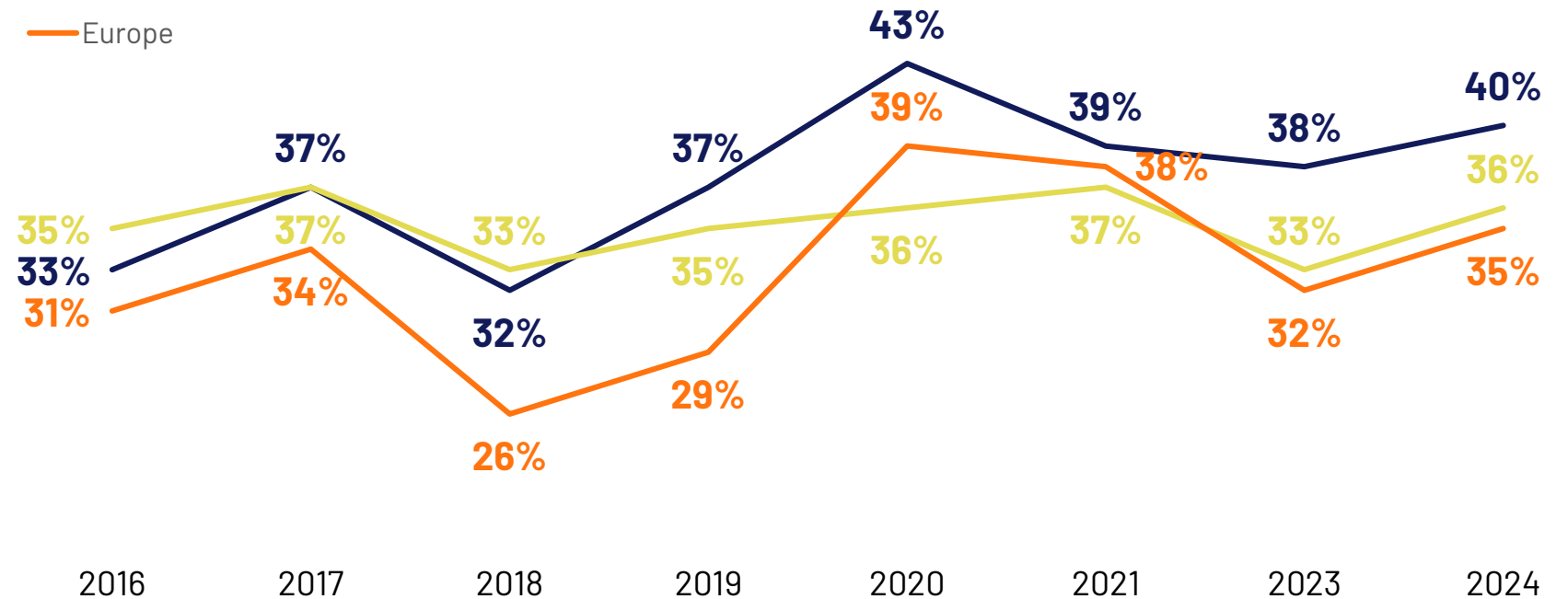
Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

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

Global Country Average

% very/fairly satisfied

Legend:
- Global Country Average
- G7 (*G8 2016–21)
- Europe

Global Country Average: 33% (2016), 37% (2017), 32% (2018), 37% (2019), 43% (2020), 39% (2021), 38% (2023), 40% (2024)

G7 (*G8 2016–21): 35% (2016), 37% (2017), 33% (2018), 35% (2019), 36% (2020), 37% (2021), 33% (2023), 36% (2024)

Europe: 31% (2016), 34% (2017), 26% (2018), 29% (2019), 39% (2020), 38% (2021), 32% (2023), 35% (2024)

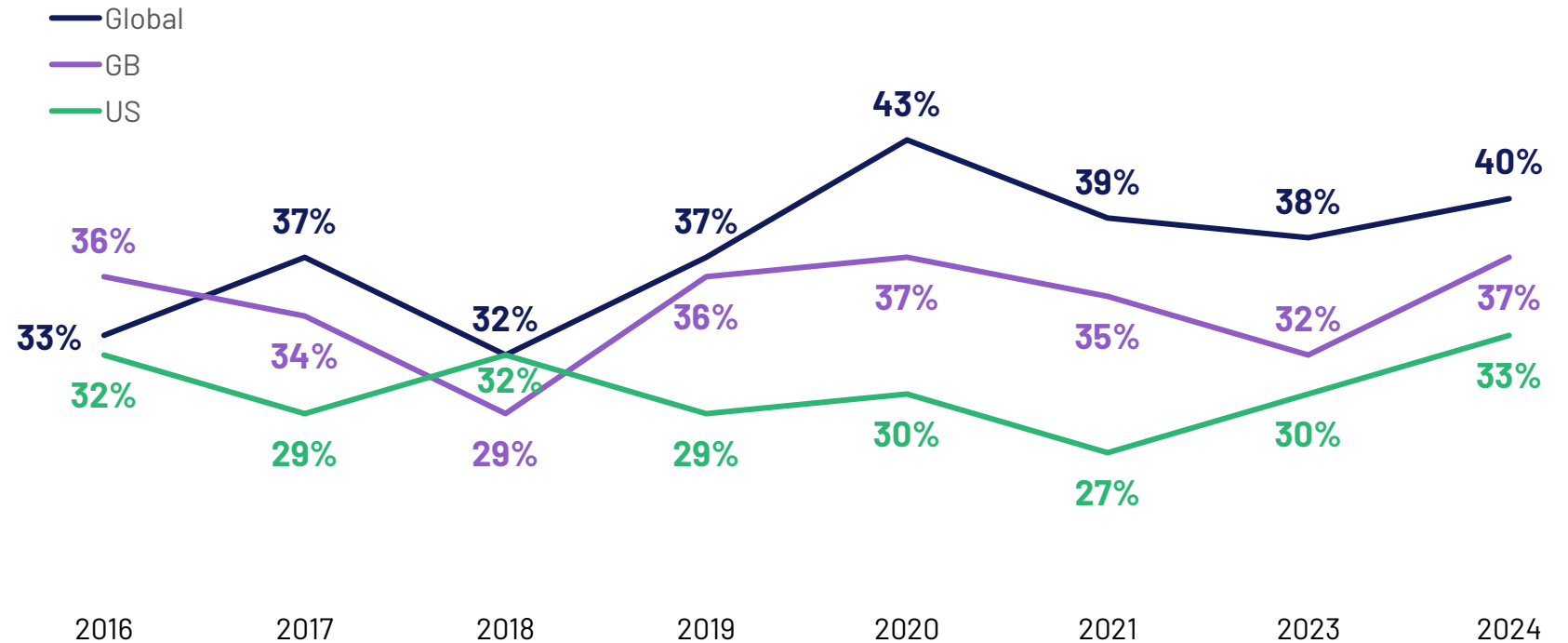# There have been sharper rises in satisfaction in Britain and the U.S.

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?

Global Country Average

% very/fairly satisfied

Legend: Global, GB, US

	2016	2017	2018	2019	2020	2021	2023	2024
Global	33%	37%	32%	37%	43%	39%	38%	40%
GB	36%	34%	29%	36%	37%	35%	32%	37%
US	32%	29%	32%	29%	30%	27%	30%	33%

INFRASTRUCTURE SECTORS

There is variation in how different sectors are seen

Global Country Average*

Very/fairly good   **Very/fairly poor**

Sector	Very/fairly good	Very/fairly poor
Airports	72%	20%
Digital infrastructure e.g. high speed broadband...	61%	32%
The motorway/major road network	60%	36%
Water supply and sewerage	55%	39%
Rail infrastructure - track/stations	52%	41%
Renewable energy infrastructure e.g. solar/wind	48%	42%
The local road network	47%	49%
New housing supply	39%	53%
EV charging infrastructure	36%	49%
Flood defences	32%	57%
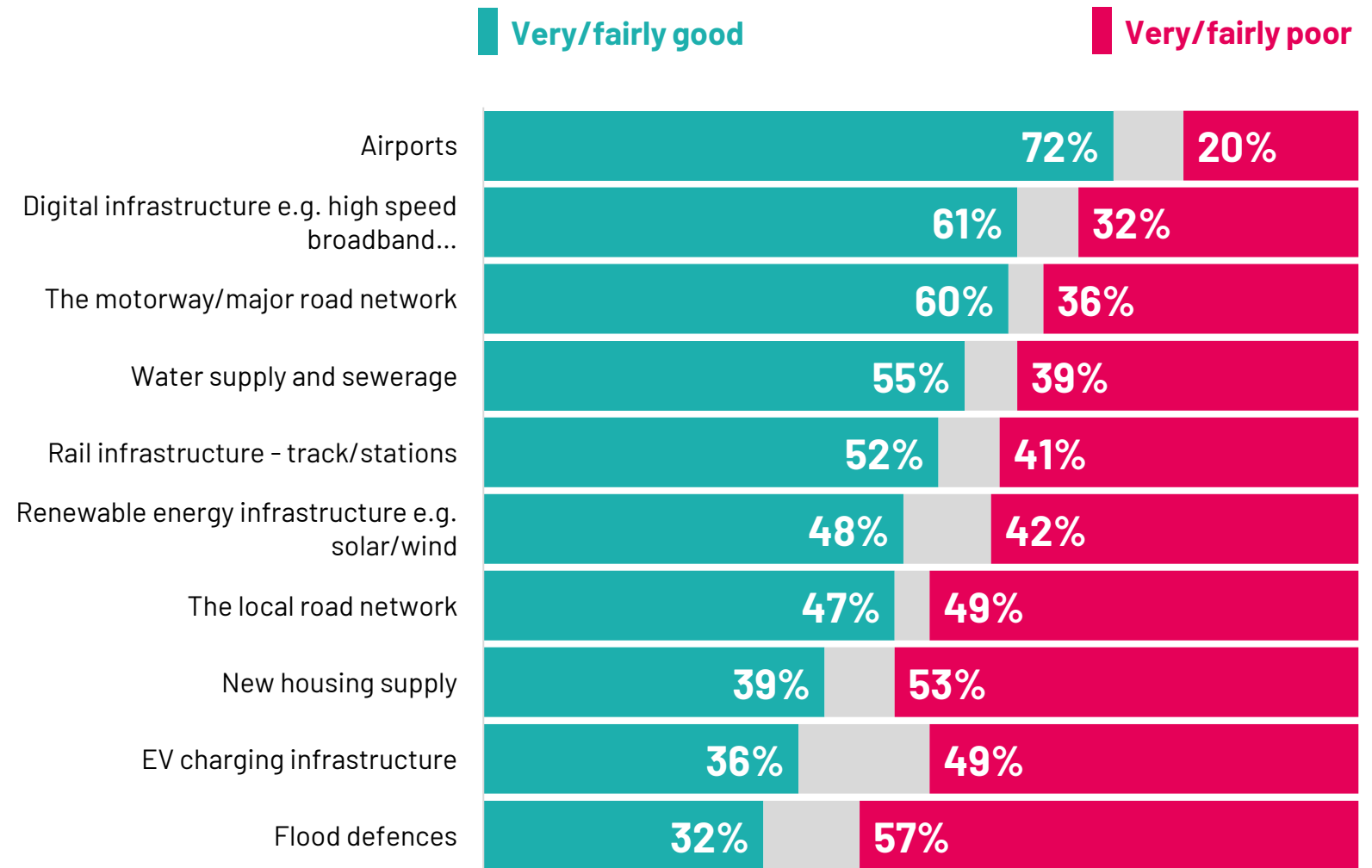
Ratings - Airports

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

Country	% very/fairly good
Global Country Average	72%
G7	68%
Indonesia	90%
Singapore	86%
Thailand	85%
New Zealand	81%
India	79%
South Africa	79%
South Korea	79%
Netherlands	79%
Chile	79%
Australia	78%
Türkiye	77%
France	76%
Spain	76%
Malaysia	74%
Ireland	73%
Philippines	73%
Sweden	73%
Belgium	72%
Great Britain	72%
Colombia	71%
Brazil	69%
Poland	69%
Italy	66%
Canada	66%
Germany	66%
Japan	66%
Argentina	65%
Mexico	65%
United States	65%
Peru	62%
Hungary	50%
Romania	43%
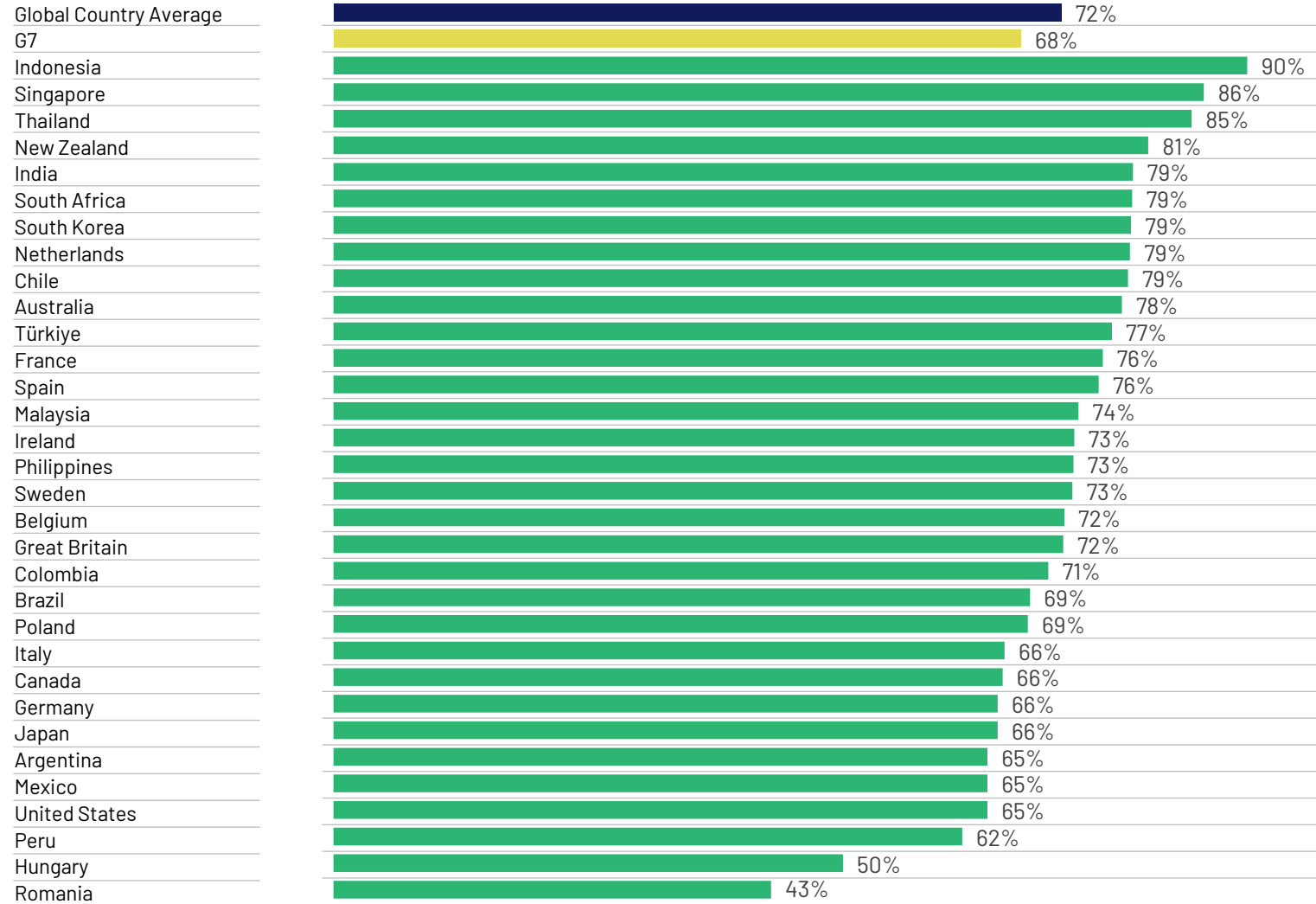
Ratings – Motorway/major road network

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

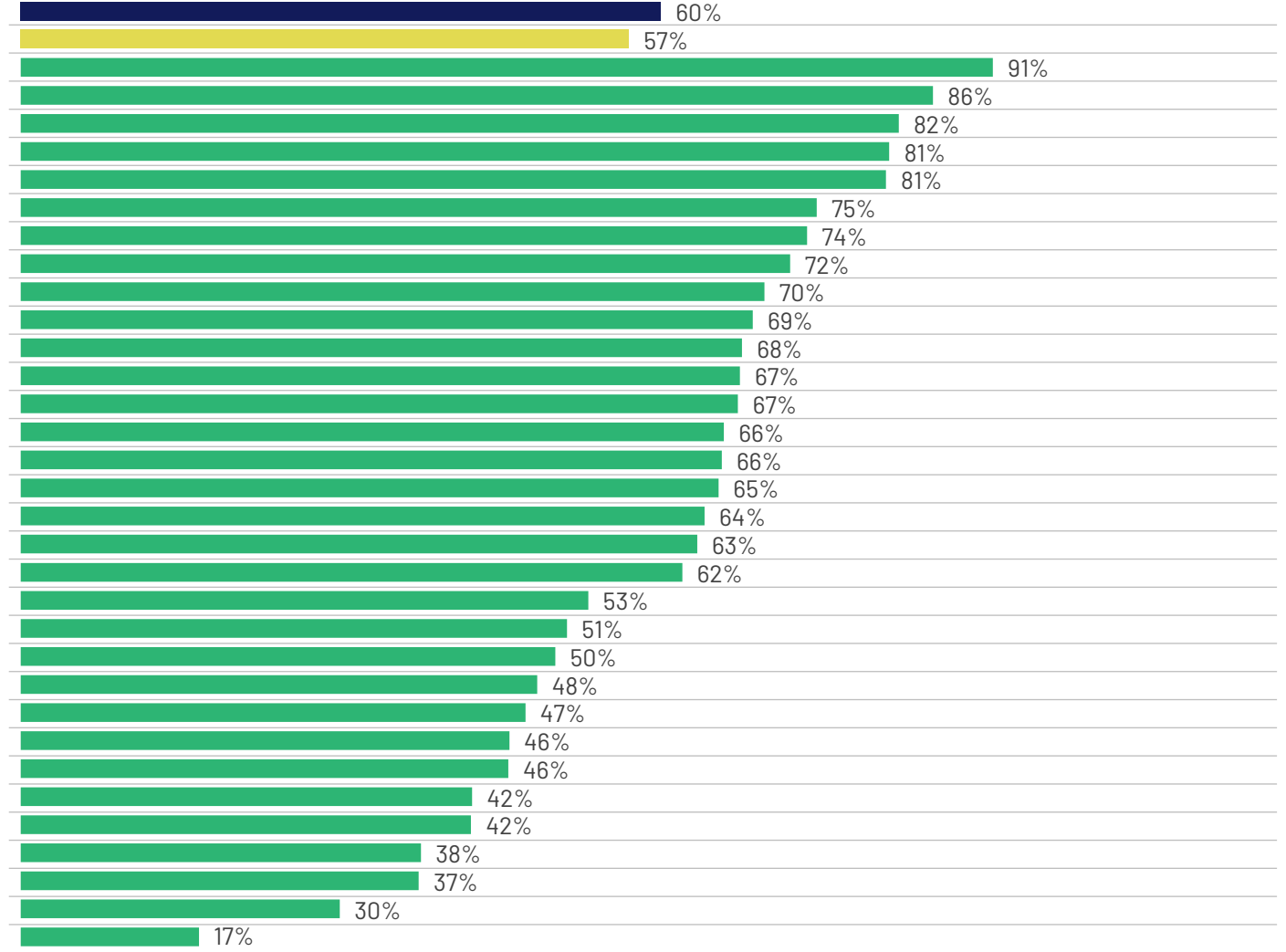Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

The motorway/major road network

Country	% very/fairly good
Global Country Average	60%
G7	57%
Indonesia	91%
Singapore	86%
Netherlands	82%
Thailand	81%
South Korea	81%
India	75%
Türkiye	74%
Philippines	72%
Ireland	70%
Spain	69%
France	68%
Sweden	67%
Chile	67%
Japan	66%
Poland	66%
Malaysia	65%
Germany	64%
Australia	63%
Great Britain	62%
Mexico	53%
South Africa	51%
New Zealand	50%
Italy	48%
United States	47%
Canada	46%
Brazil	46%
Hungary	42%
Argentina	42%
Belgium	38%
Colombia	37%
Peru	30%
Romania	17%

Ipsos

Ratings – Local road network

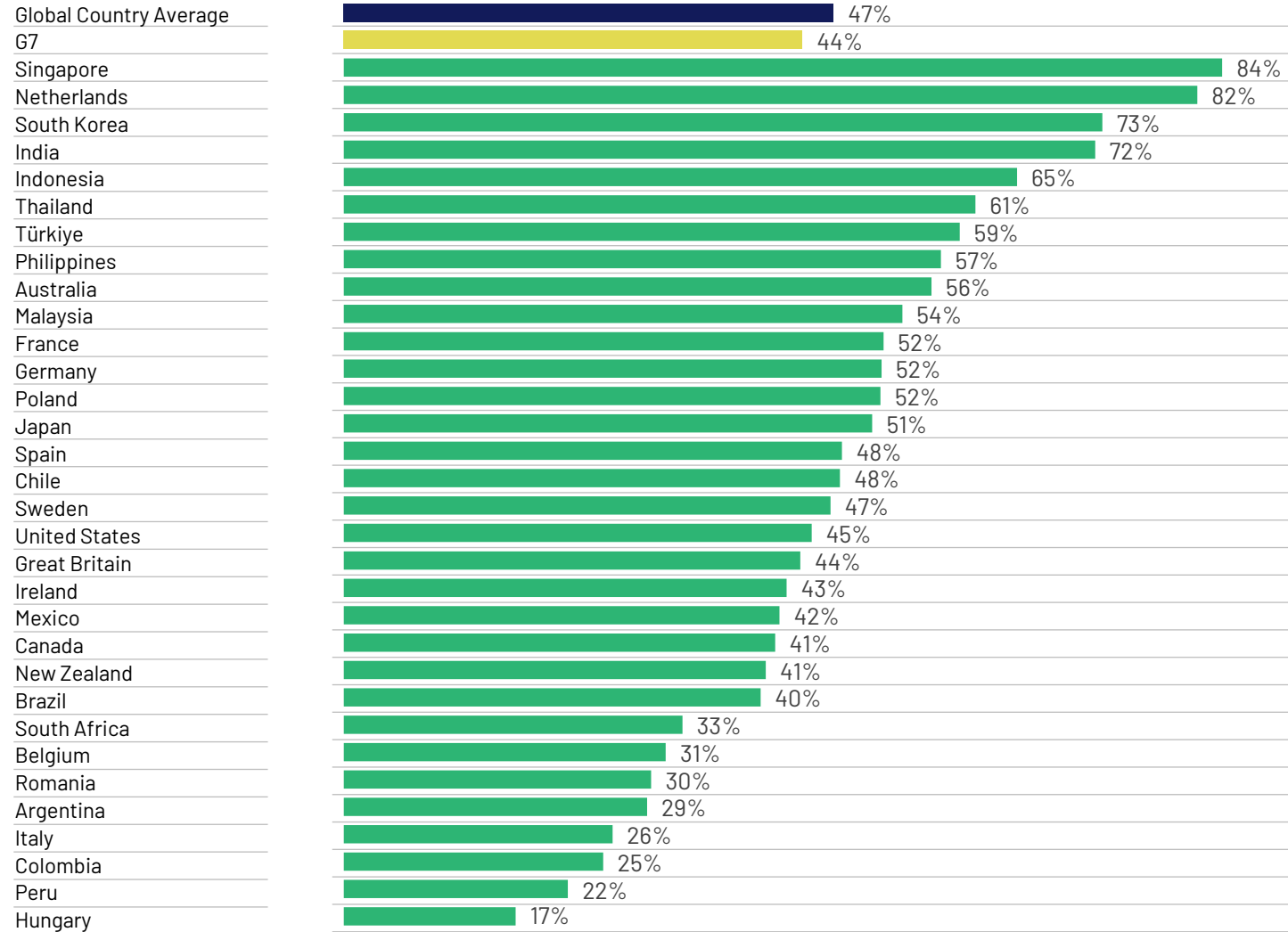Q. These next questions are about different types of infrastructure.

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	% very/fairly good
Global Country Average	47%
G7	44%
Singapore	84%
Netherlands	82%
South Korea	73%
India	72%
Indonesia	65%
Thailand	61%
Türkiye	59%
Philippines	57%
Australia	56%
Malaysia	54%
France	52%
Germany	52%
Poland	52%
Japan	51%
Spain	48%
Chile	48%
Sweden	47%
United States	45%
Great Britain	44%
Ireland	43%
Mexico	42%
Canada	41%
New Zealand	41%
Brazil	40%
South Africa	33%
Belgium	31%
Romania	30%
Argentina	29%
Italy	26%
Colombia	25%
Peru	22%
Hungary	17%

Ratings – Rail infrastructure

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

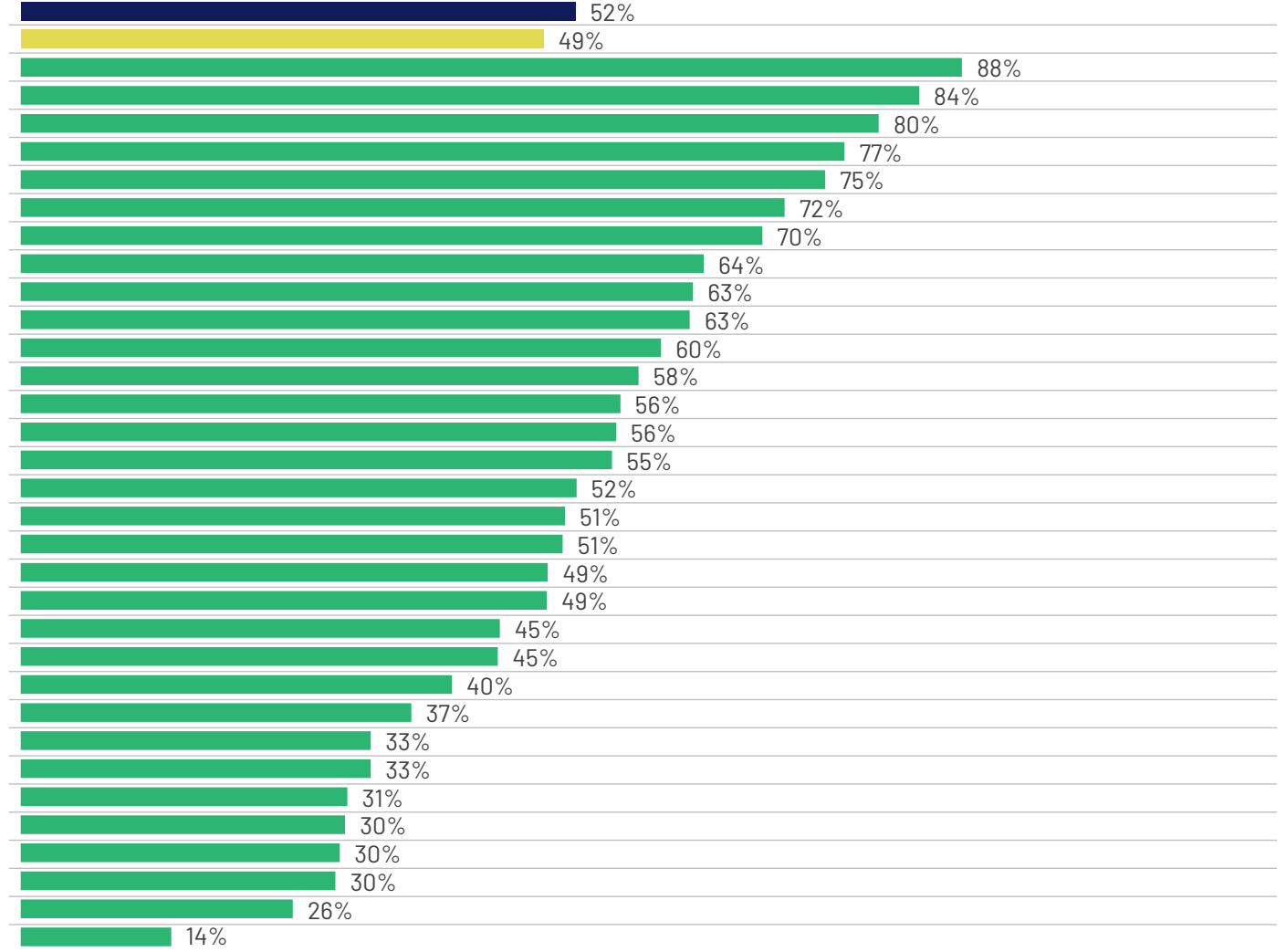Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

Rail infrastructure – track/stations

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

Country	% very/fairly good
Global Country Average	52%
G7	49%
Indonesia	88%
Singapore	84%
South Korea	80%
Thailand	77%
India	75%
Netherlands	72%
Malaysia	70%
Japan	64%
Philippines	63%
Australia	63%
Türkiye	60%
France	58%
Chile	56%
Spain	56%
Poland	55%
Ireland	52%
Great Britain	51%
Belgium	51%
Canada	49%
United States	49%
Italy	45%
Mexico	45%
Brazil	40%
Sweden	37%
New Zealand	33%
South Africa	33%
Peru	31%
Argentina	30%
Colombia	30%
Germany	30%
Hungary	26%
Romania	14%

Ratings – New housing supply

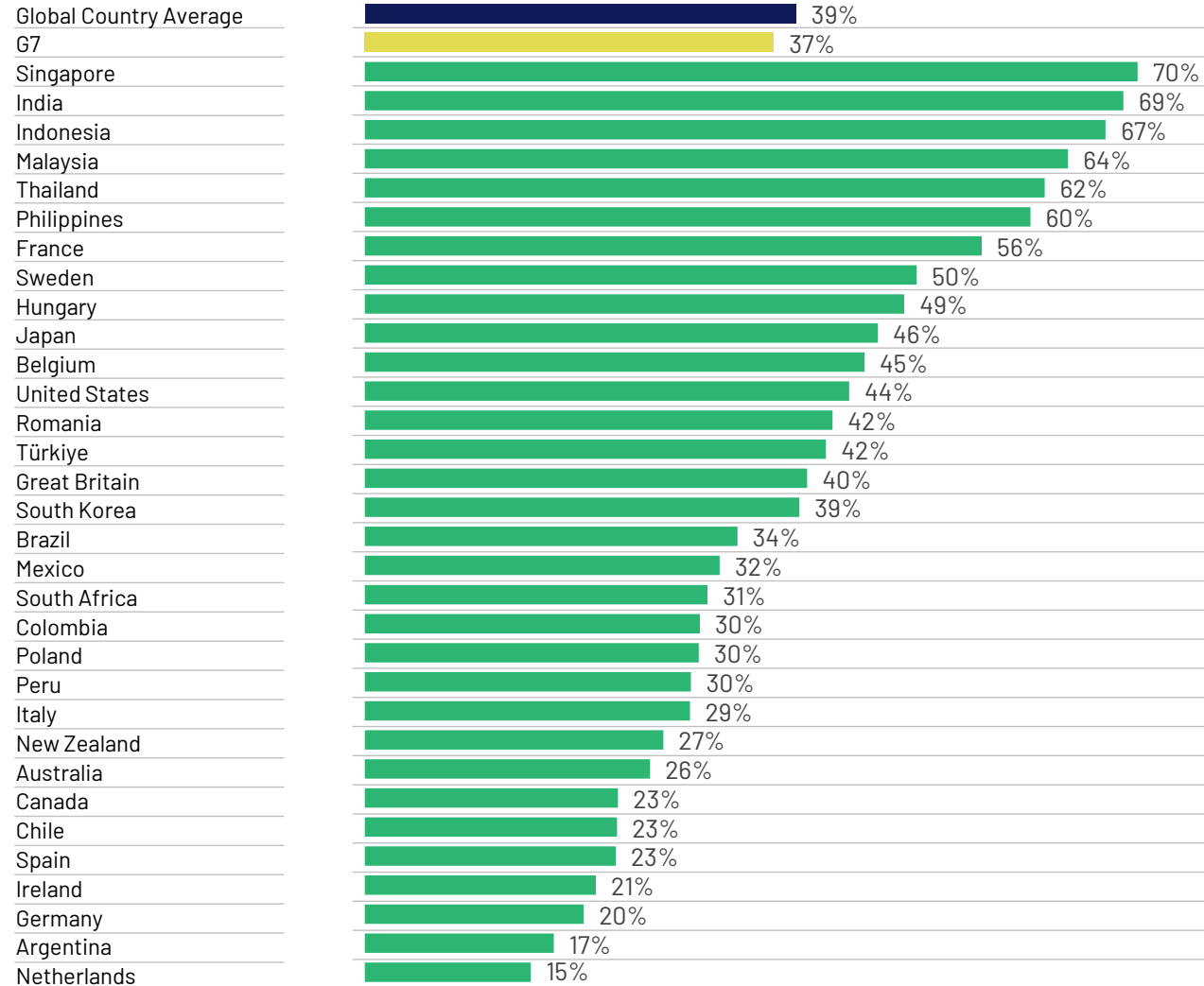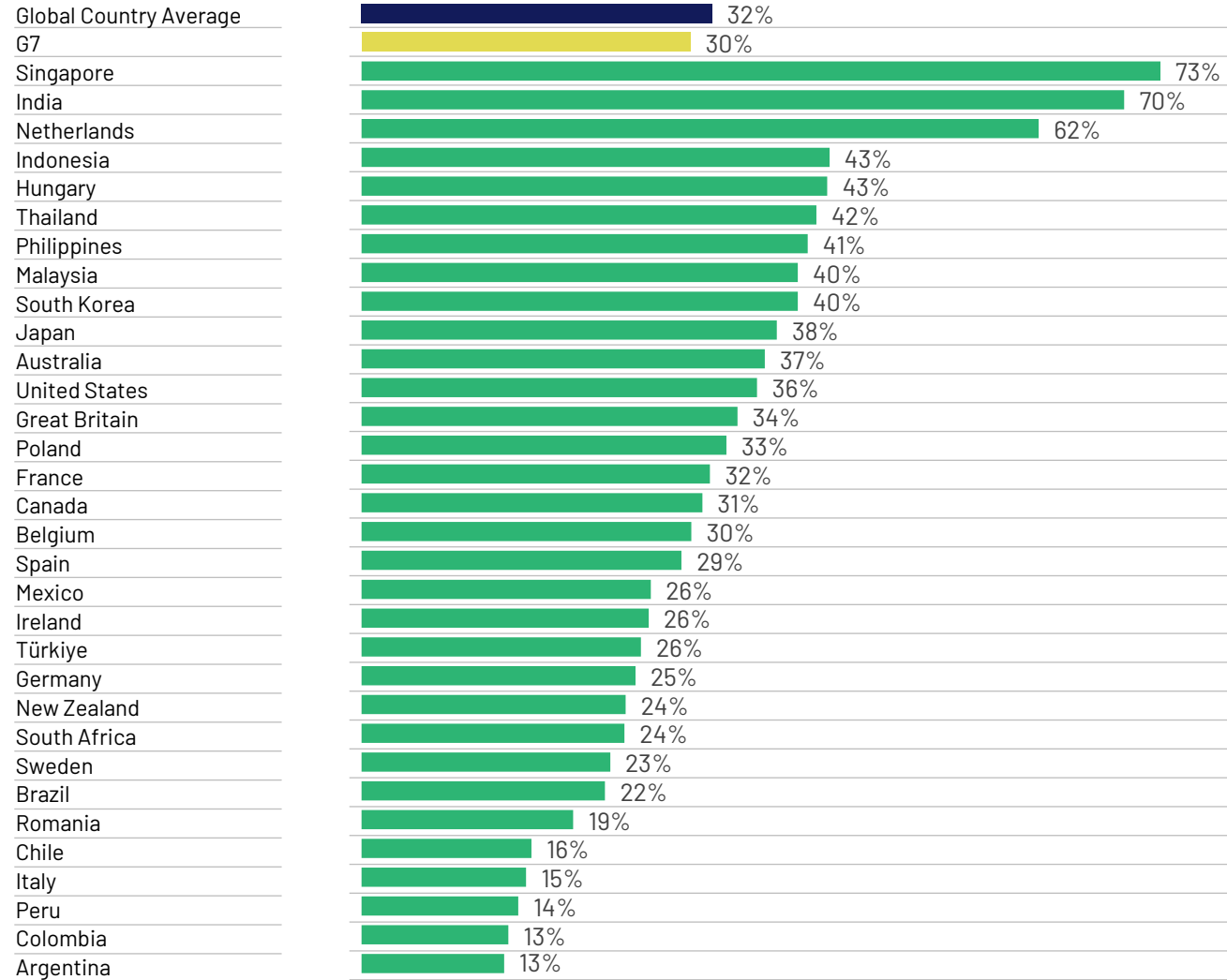Q. These next questions are about different types of infrastructure.

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
Global Country Average	39%
G7	37%
Singapore	70%
India	69%
Indonesia	67%
Malaysia	64%
Thailand	62%
Philippines	60%
France	56%
Sweden	50%
Hungary	49%
Japan	46%
Belgium	45%
United States	44%
Romania	42%
Türkiye	42%
Great Britain	40%
South Korea	39%
Brazil	34%
Mexico	32%
South Africa	31%
Colombia	30%
Poland	30%
Peru	30%
Italy	29%
New Zealand	27%
Australia	26%
Canada	23%
Chile	23%
Spain	23%
Ireland	21%
Germany	20%
Argentina	17%
Netherlands	15%

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

Country	% very/fairly good
Global Country Average	32%
G7	30%
Singapore	73%
India	70%
Netherlands	62%
Indonesia	43%
Hungary	43%
Thailand	42%
Philippines	41%
Malaysia	40%
South Korea	40%
Japan	38%
Australia	37%
United States	36%
Great Britain	34%
Poland	33%
France	32%
Canada	31%
Belgium	30%
Spain	29%
Mexico	26%
Ireland	26%
Türkiye	26%
Germany	25%
New Zealand	24%
South Africa	24%
Sweden	23%
Brazil	22%
Romania	19%
Chile	16%
Italy	15%
Peru	14%
Colombia	13%
Argentina	13%

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

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

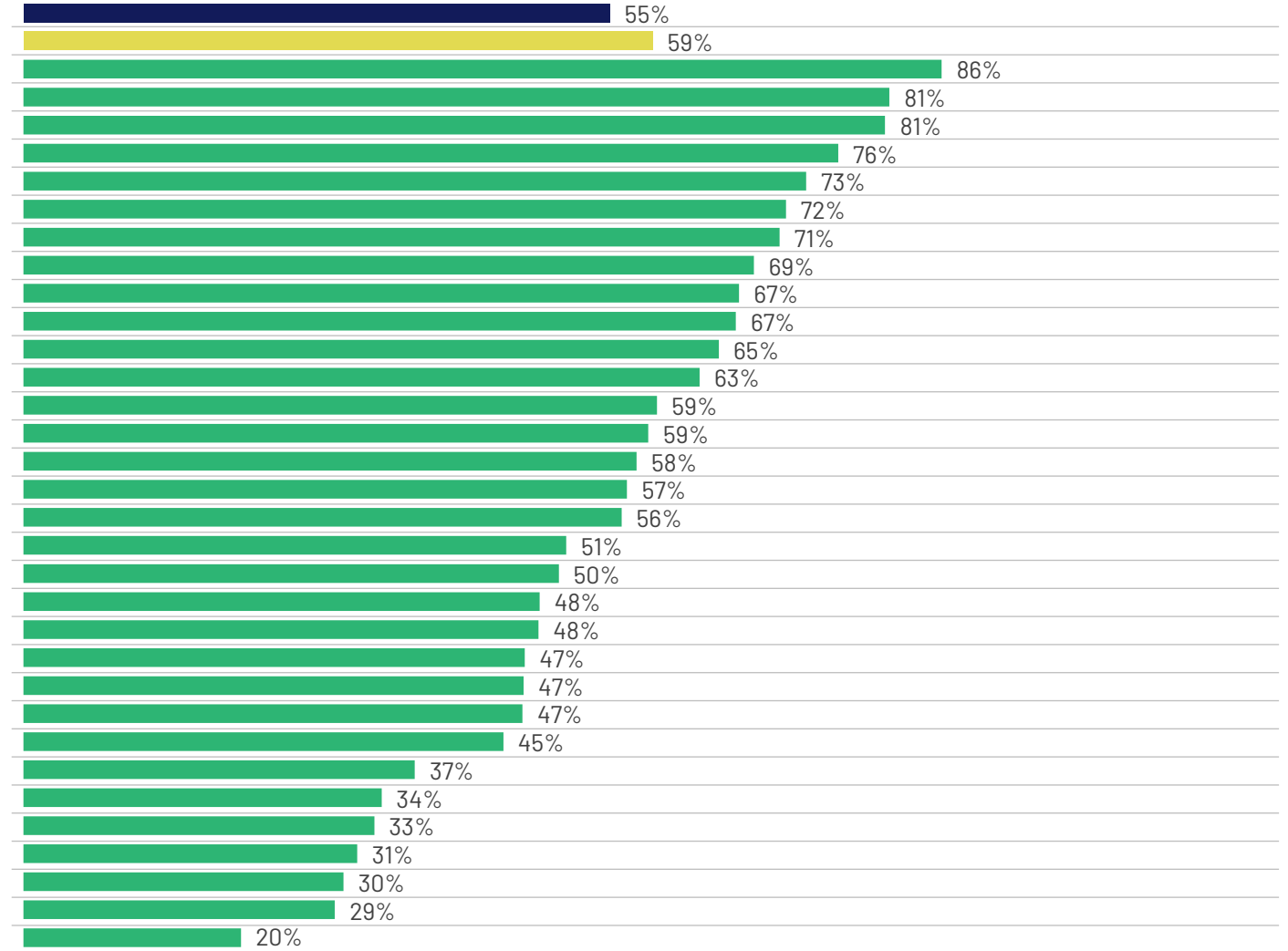Please indicate how good or poor you rate the current quality of each one in [COUNTRY]...

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

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

Country	% very/fairly good
Global Country Average	61%
G7	55%
Singapore	81%
Netherlands	78%
Indonesia	72%
India	72%
France	71%
Sweden	71%
New Zealand	70%
South Korea	70%
Thailand	68%
Spain	67%
Great Britain	66%
Poland	65%
Romania	65%
Chile	61%
Hungary	61%
Belgium	61%
Mexico	60%
Philippines	59%
United States	59%
Ireland	58%
Brazil	58%
South Africa	57%
Australia	57%
Malaysia	57%
Canada	55%
Japan	52%
Italy	50%
Türkiye	50%
Colombia	48%
Argentina	46%
Peru	45%
Germany	29%
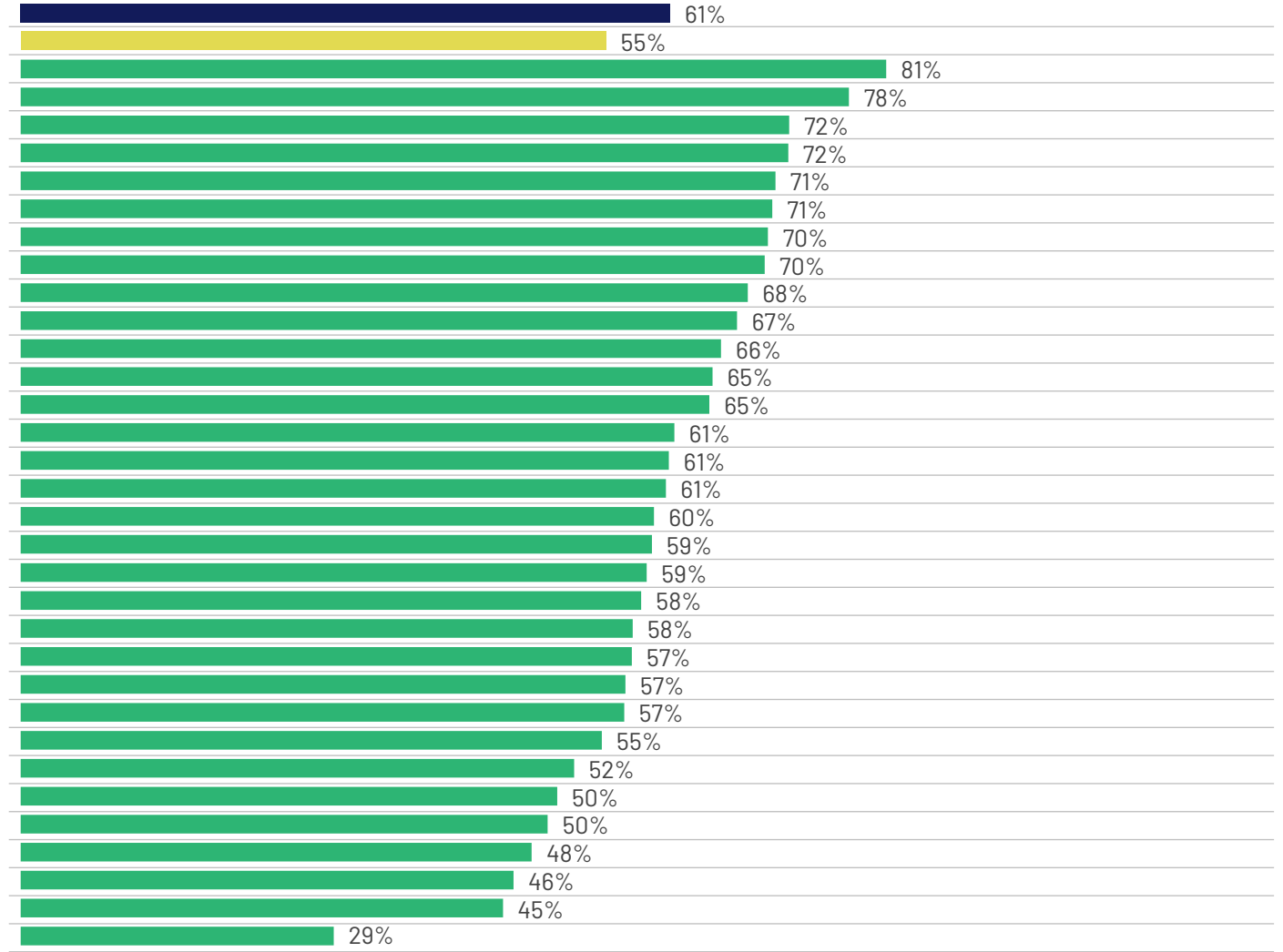
Ratings – Water supply/sewerage

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	% very/fairly good
Global Country Average	55%
G7	59%
Singapore	86%
Netherlands	81%
Australia	81%
Germany	76%
France	73%
South Korea	72%
India	71%
Canada	69%
Belgium	67%
Spain	67%
Sweden	65%
Poland	63%
Japan	59%
Indonesia	59%
United States	58%
Malaysia	57%
New Zealand	56%
Hungary	51%
Ireland	50%
Romania	48%
Philippines	48%
Türkiye	47%
Thailand	47%
Great Britain	47%
Brazil	45%
Chile	37%
Italy	34%
Colombia	33%
South Africa	31%
Argentina	30%
Mexico	29%
Peru	20%

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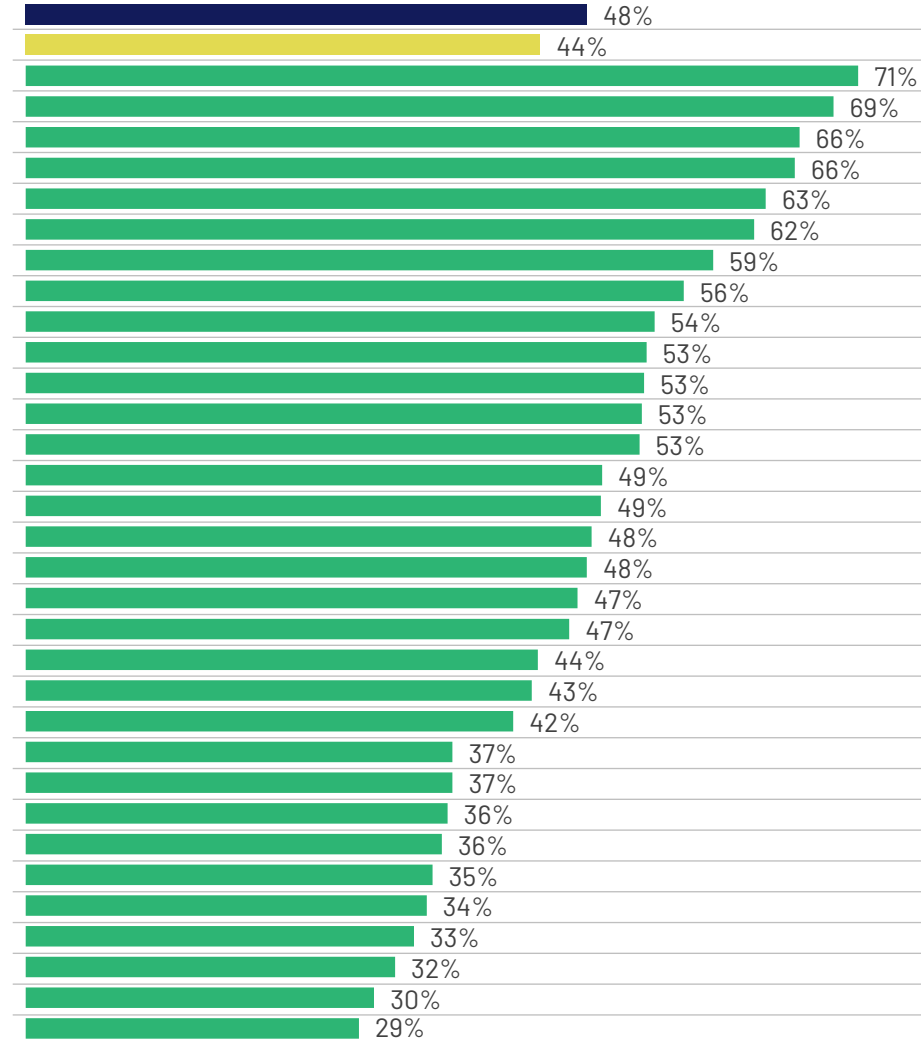
Renewable energy infrastructure e.g. solar and wind energy

Country	% very/fairly good
Global Country Average	48%
G7	44%
Singapore	71%
India	69%
Philippines	66%
Netherlands	66%
Indonesia	63%
Thailand	62%
Belgium	59%
France	56%
Spain	54%
Australia	53%
Malaysia	53%
Sweden	53%
Türkiye	53%
New Zealand	49%
Ireland	49%
Great Britain	48%
Brazil	48%
United States	47%
Chile	47%
Germany	44%
Canada	43%
Poland	42%
Romania	37%
South Korea	37%
Hungary	36%
Italy	36%
Mexico	35%
Japan	34%
South Africa	33%
Colombia	32%
Peru	30%
Argentina	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]...
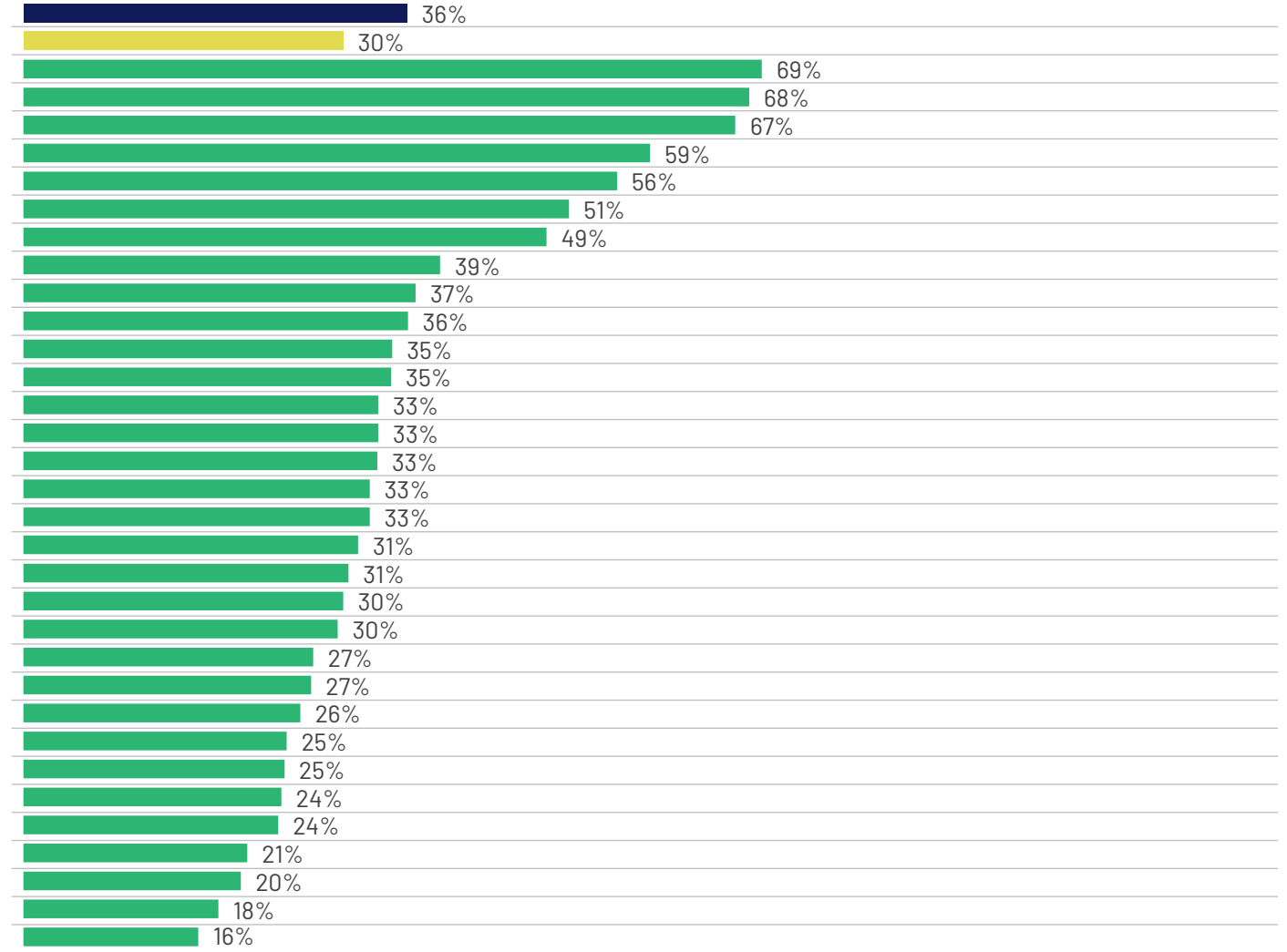
Electric vehicle charging infrastructure

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

Country	% 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%

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

% very/fairly good
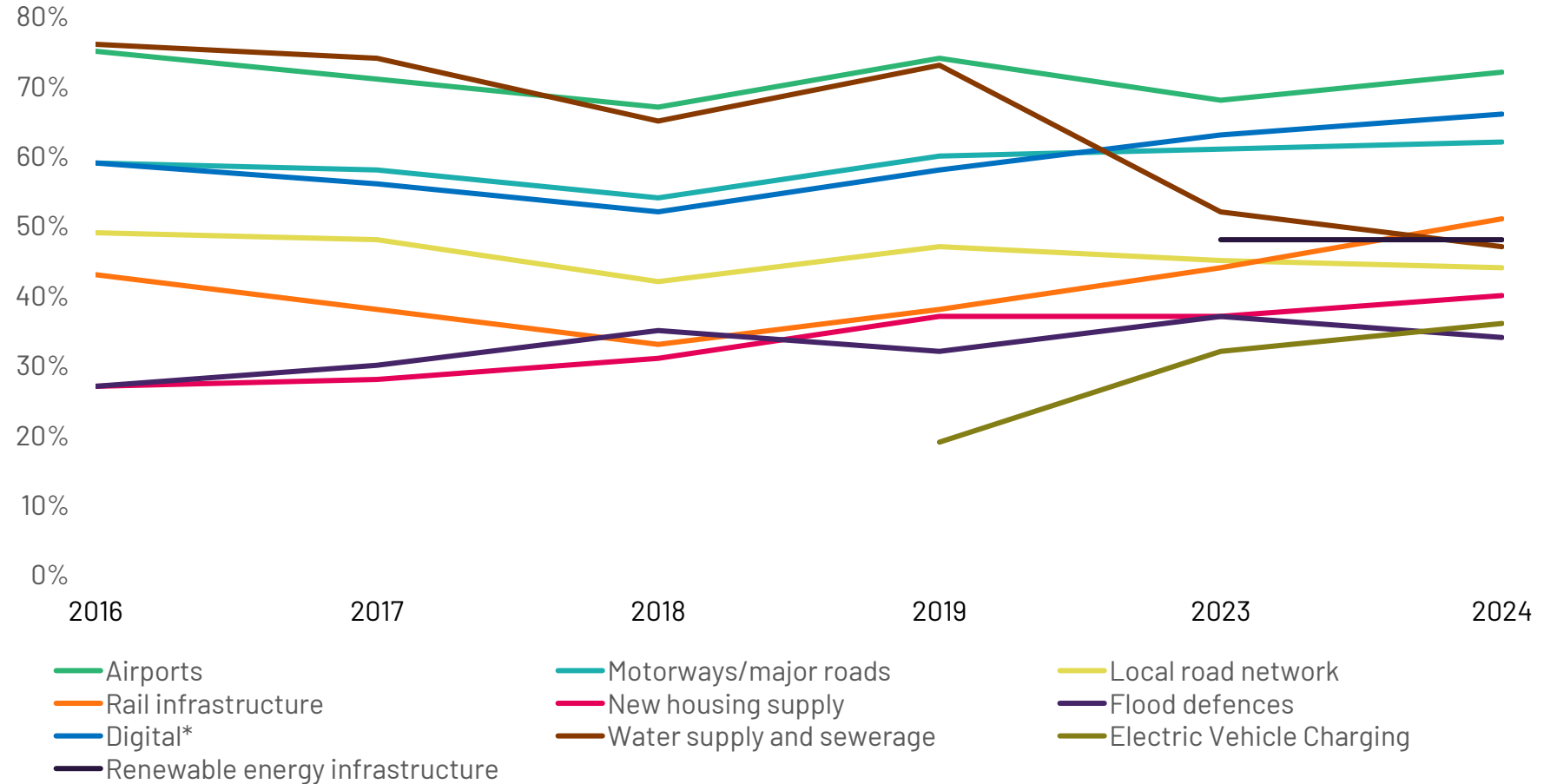
Legend:
- Airports
- Motorways/major roads
- Local road network
- Rail infrastructure
- New housing supply
- Flood defences
- Digital*
- Water supply and sewerage
- Electric Vehicle Charging
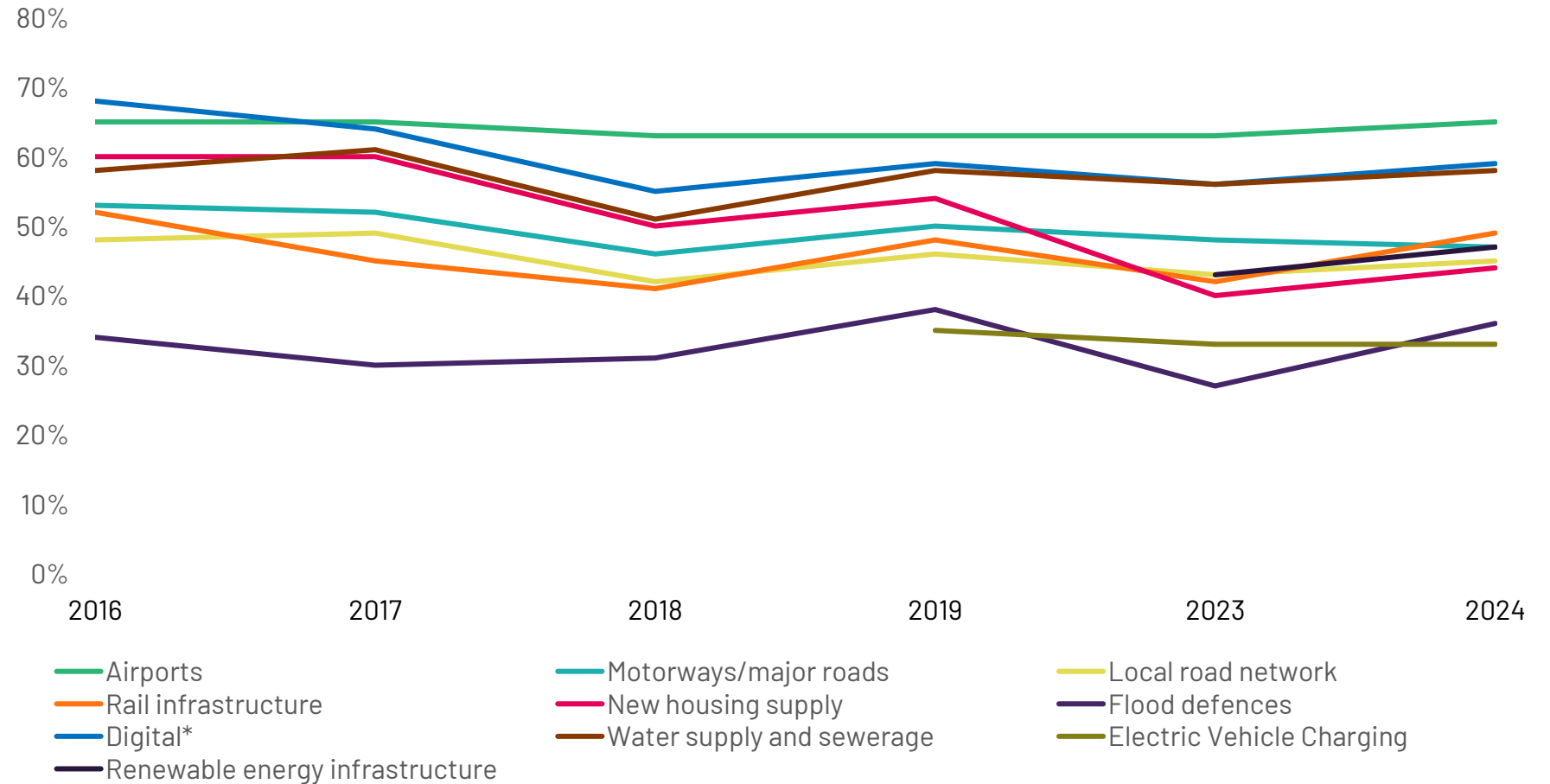- Renewable energy infrastructure

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

The picture has been subject to less change in the U.S
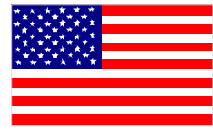
% very/fairly good

Legend:
- Airports
- Motorways/major roads
- Local road network
- Rail infrastructure
- New housing supply
- Flood defences
- Digital*
- Water supply and sewerage
- Electric Vehicle Charging
- Renewable energy infrastructure

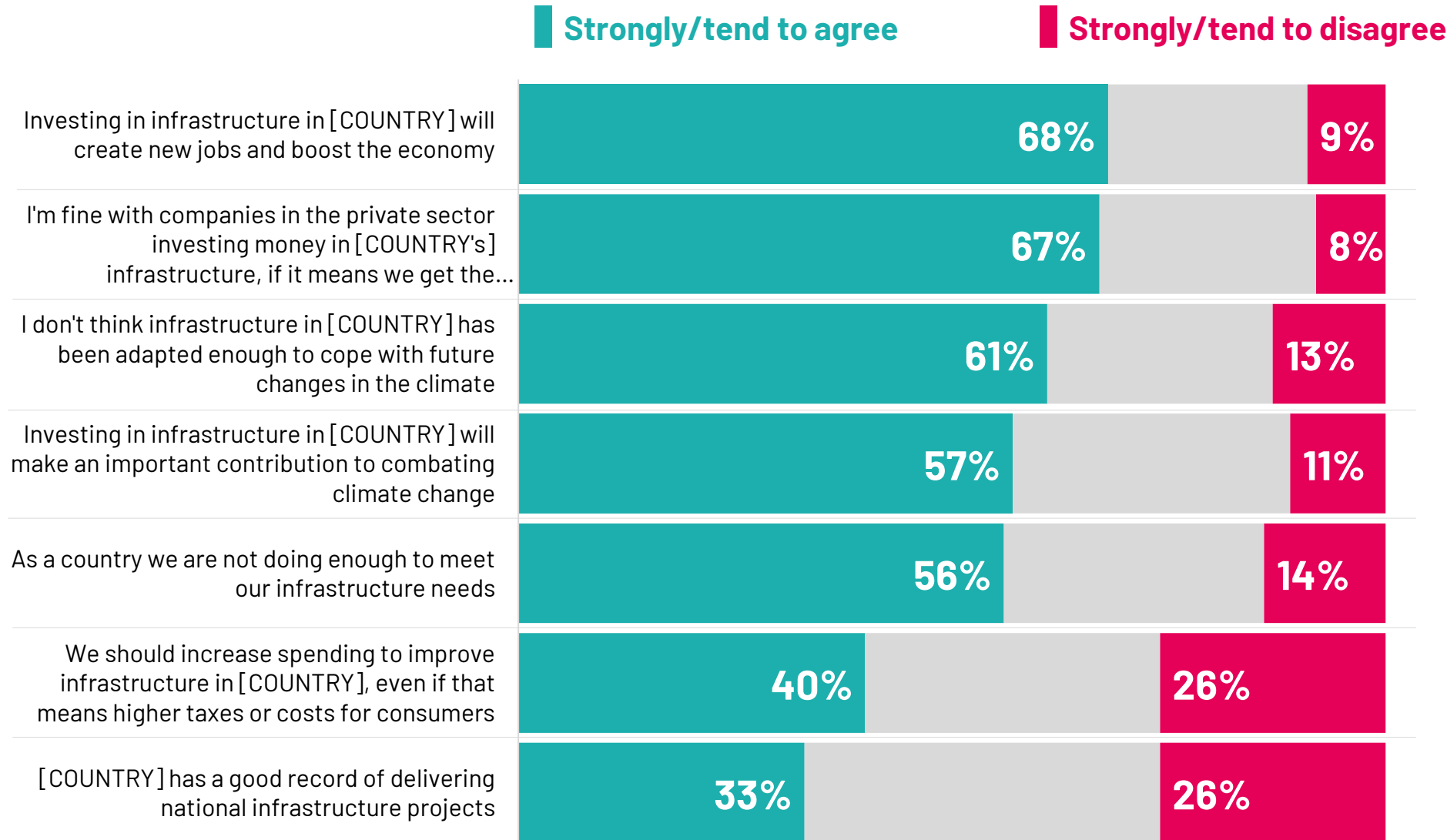* Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G

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

■ Strongly/tend to agree   **■ Strongly/tend to disagree**

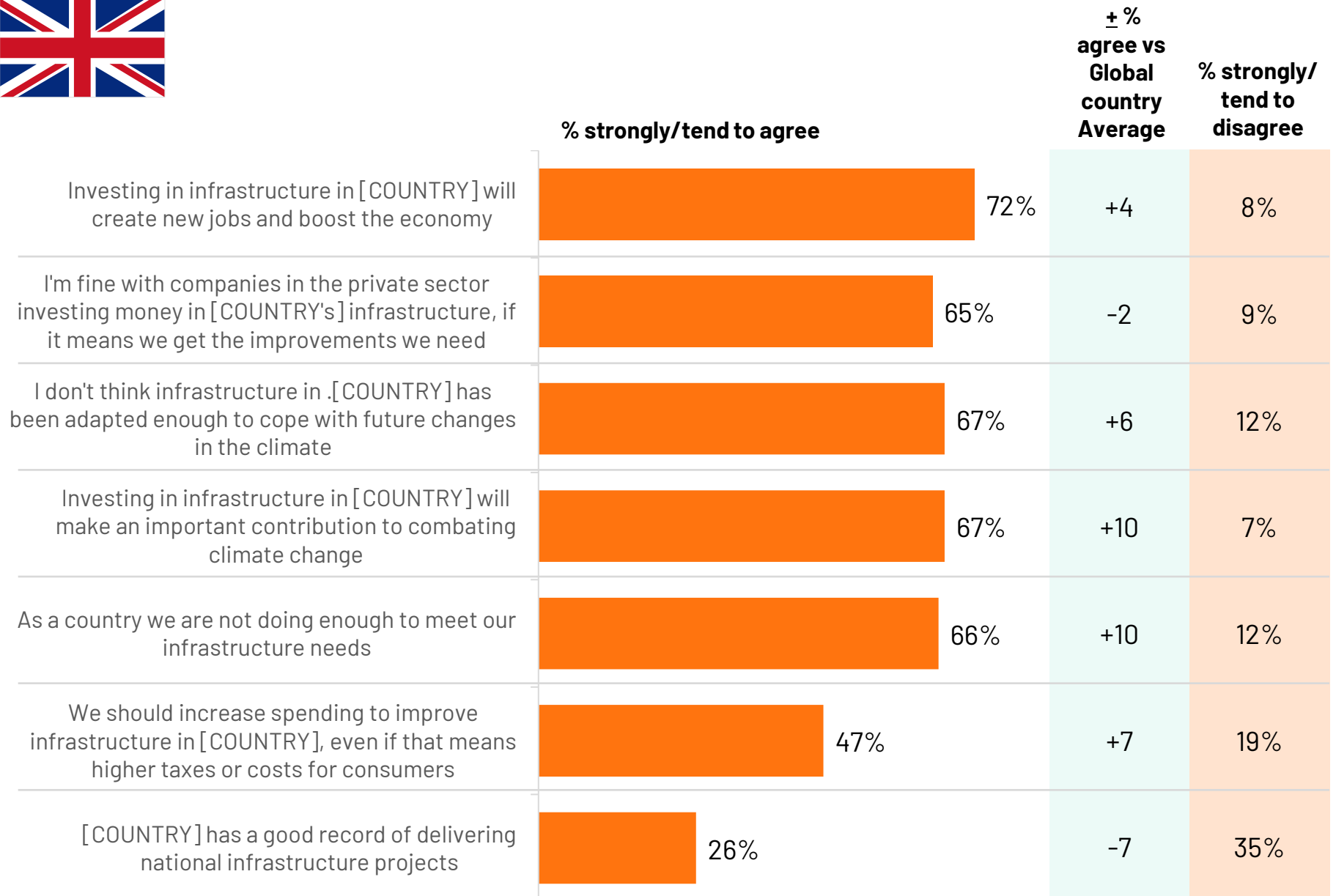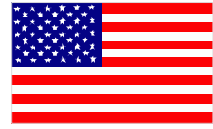| Statement	Agree	Disagree
Investing in infrastructure in [COUNTRY] will create new jobs and boost the economy	68%	9%
I'm fine with companies in the private sector investing money in [COUNTRY's] infrastructure, if it means we get the...	67%	8%
I don't think infrastructure in [COUNTRY] has been adapted enough to cope with future changes in the climate	61%	13%
Investing in infrastructure in [COUNTRY] will make an important contribution to combating climate change	57%	11%
As a country we are not doing enough to meet our infrastructure needs	56%	14%
We should increase spending to improve infrastructure in [COUNTRY], even if that means higher taxes or costs for consumers	40%	26%
[COUNTRY] has a good record of delivering national infrastructure projects	33%	26%

Ipsos

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…?

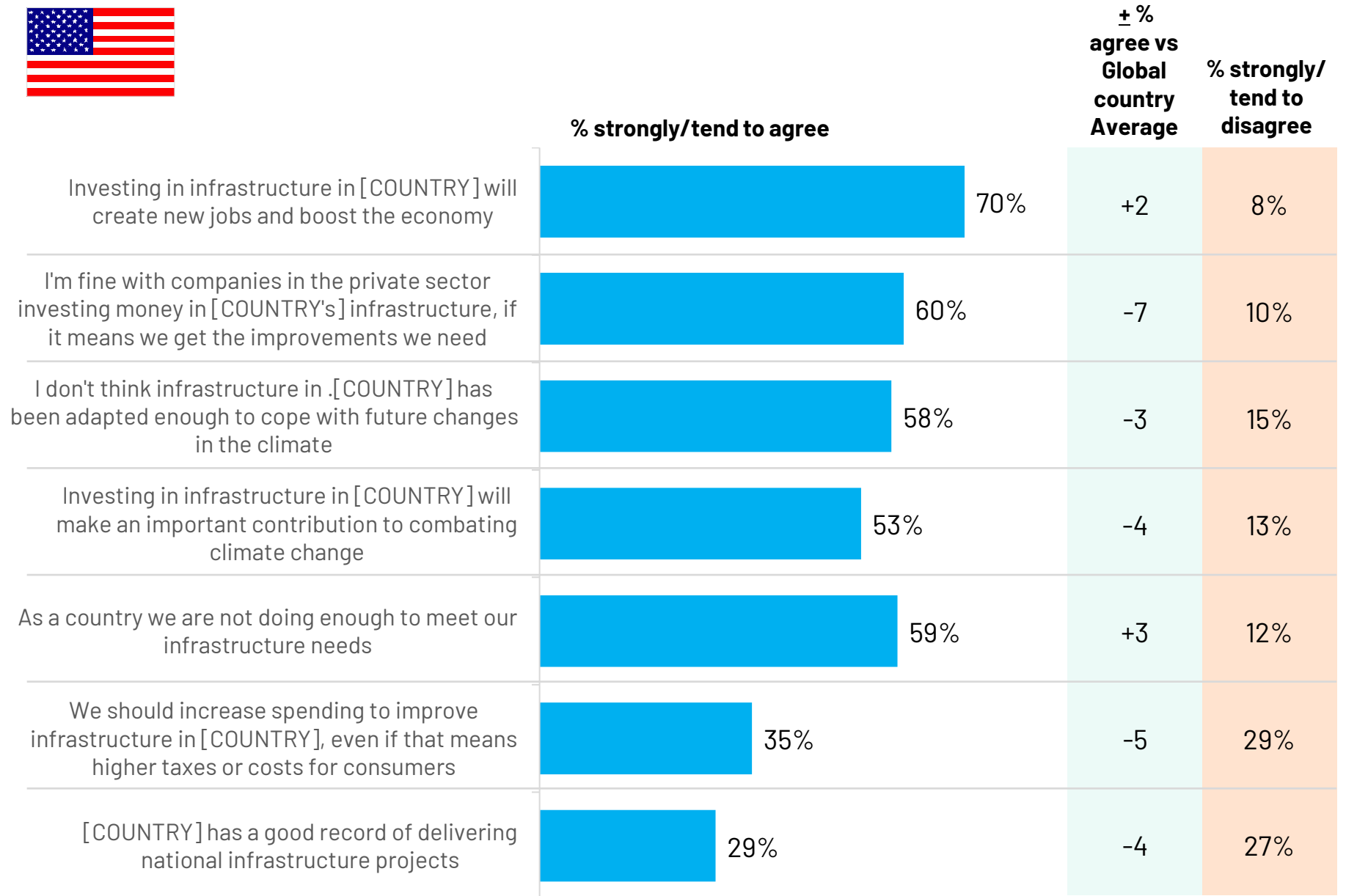| Statement	% strongly/tend to agree	± % agree vs Global country Average	% strongly/tend to disagree
Investing in infrastructure in [COUNTRY] will create new jobs and boost the economy	72%	+4	8%
I'm fine with companies in the private sector investing money in [COUNTRY's] infrastructure, if it means we get the improvements we need	65%	-2	9%
I don't think infrastructure in .[COUNTRY] has been adapted enough to cope with future changes in the climate	67%	+6	12%
Investing in infrastructure in [COUNTRY] will make an important contribution to combating climate change	67%	+10	7%
As a country we are not doing enough to meet our infrastructure needs	66%	+10	12%
We should increase spending to improve infrastructure in [COUNTRY], even if that means higher taxes or costs for consumers	47%	+7	19%
[COUNTRY] has a good record of delivering national infrastructure projects	26%	-7	35%

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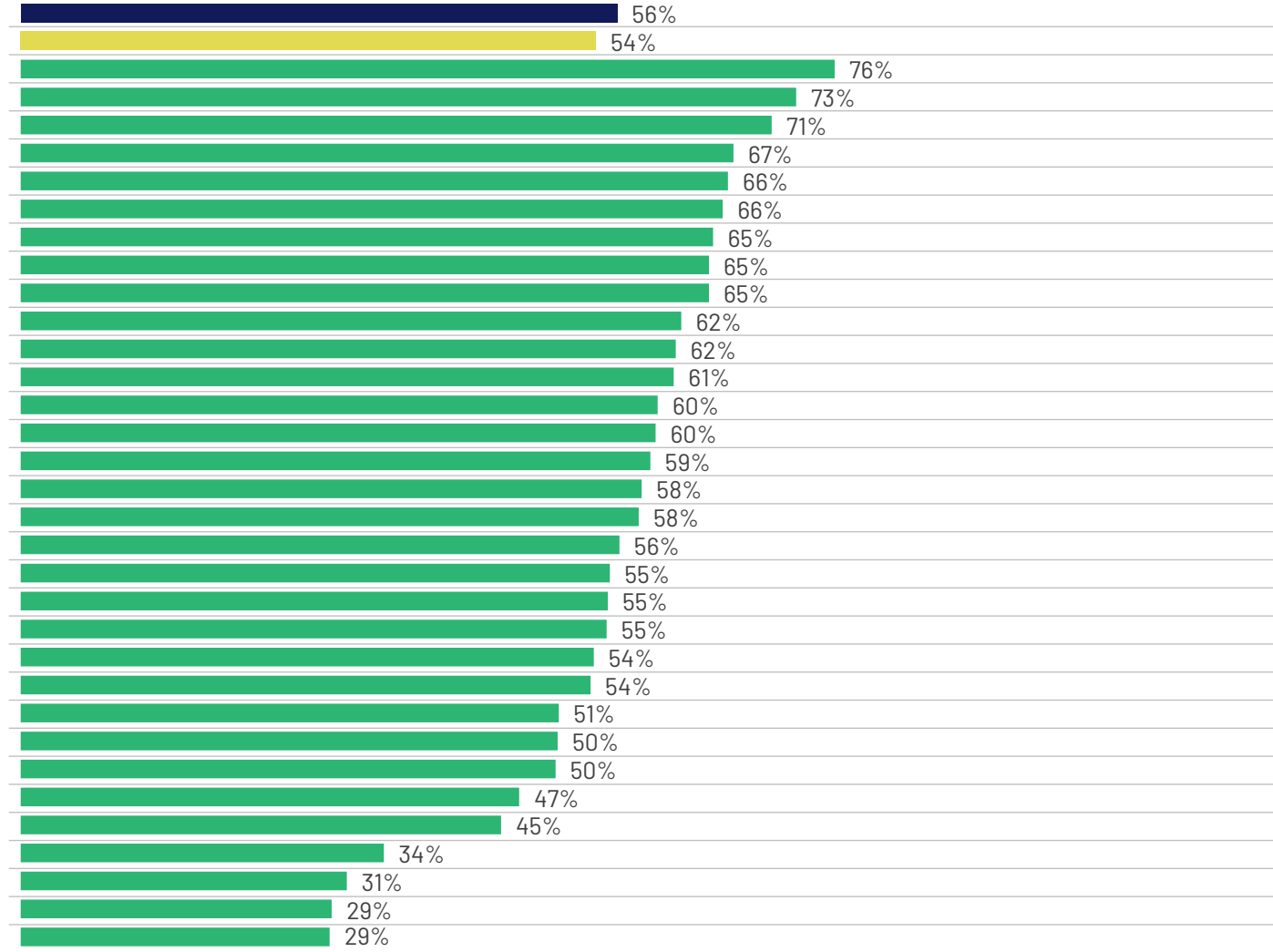
Base: 23,530 adults (online), 32 countries
May-June 2024 – 1,001 in US

	% strongly/tend to agree	± % agree vs Global country Average	% strongly/ tend to disagree
Investing in infrastructure in [COUNTRY] will create new jobs and boost the economy	70%	+2	8%
I'm fine with companies in the private sector investing money in [COUNTRY's] infrastructure, if it means we get the improvements we need	60%	-7	10%
I don't think infrastructure in .[COUNTRY] has been adapted enough to cope with future changes in the climate	58%	-3	15%
Investing in infrastructure in [COUNTRY] will make an important contribution to combating climate change	53%	-4	13%
As a country we are not doing enough to meet our infrastructure needs	59%	+3	12%
We should increase spending to improve infrastructure in [COUNTRY], even if that means higher taxes or costs for consumers	35%	-5	29%
[COUNTRY] has a good record of delivering national infrastructure projects	29%	-4	27%

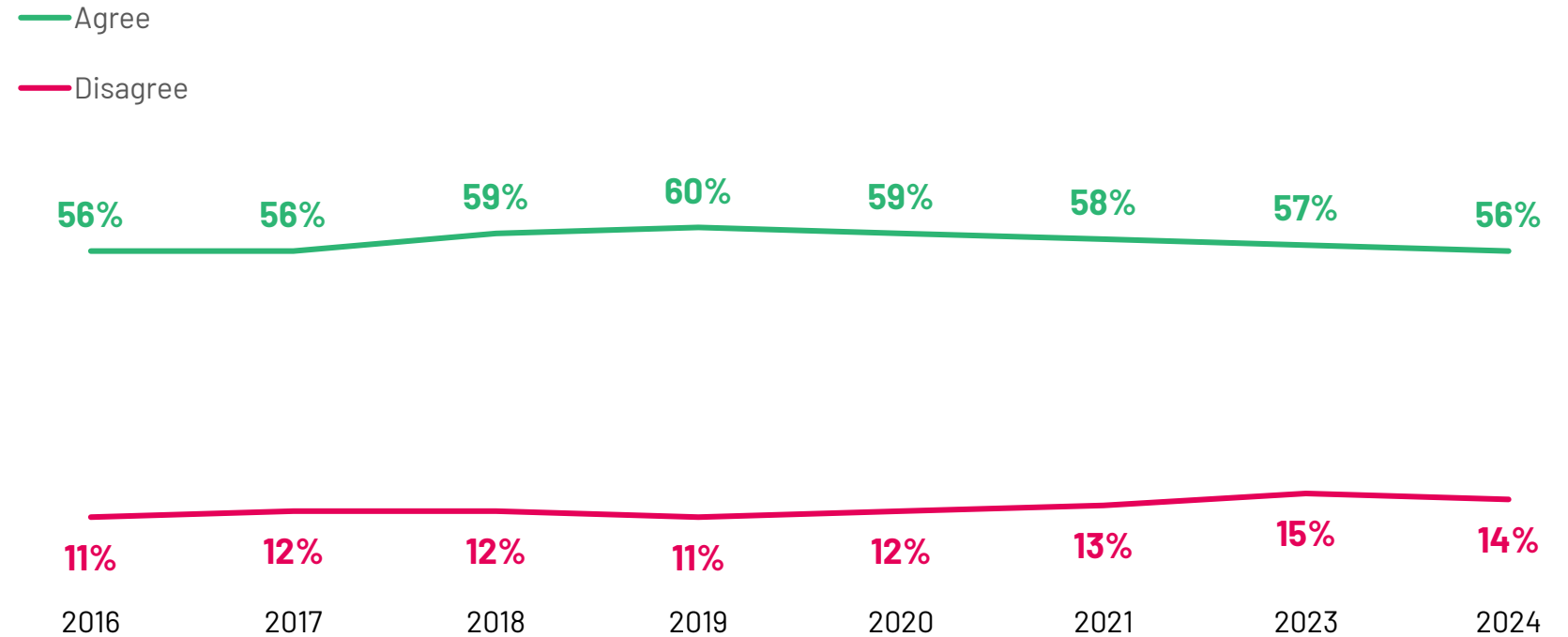# A majority in most countries agree that their country is not doing enough to meet needs

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	56%
G7	54%
Romania	76%
South Africa	73%
Thailand	71%
New Zealand	67%
Great Britain	66%
India	66%
Brazil	65%
Argentina	65%
Peru	65%
Philippines	62%
Mexico	62%
Italy	61%
Germany	60%
Ireland	60%
United States	59%
Malaysia	58%
Türkiye	58%
Hungary	56%
Colombia	55%
Australia	55%
Belgium	55%
Sweden	54%
Canada	54%
France	51%
Indonesia	50%
Spain	50%
Chile	47%
Poland	45%
Singapore	34%
Netherlands	31%
South Korea	29%
Japan	29%

Source: Ipsos/GIIA

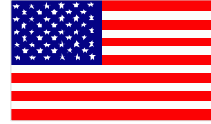# 'We're not doing enough' – this sentiment has remained flat over time

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

Agree

Disagree

2016	2017	2018	2019	2020	2021	2023	2024
56%	56%	59%	60%	59%	58%	57%	56%
11%	12%	12%	11%	12%	13%	15%	14%

Source: Ipsos/GIIA

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"

2021

64% Agree
6% Disagree

2023

68% Agree
8% Disagree

2024

66% Agree
12% Disagree

Source: Ipsos/GIIA
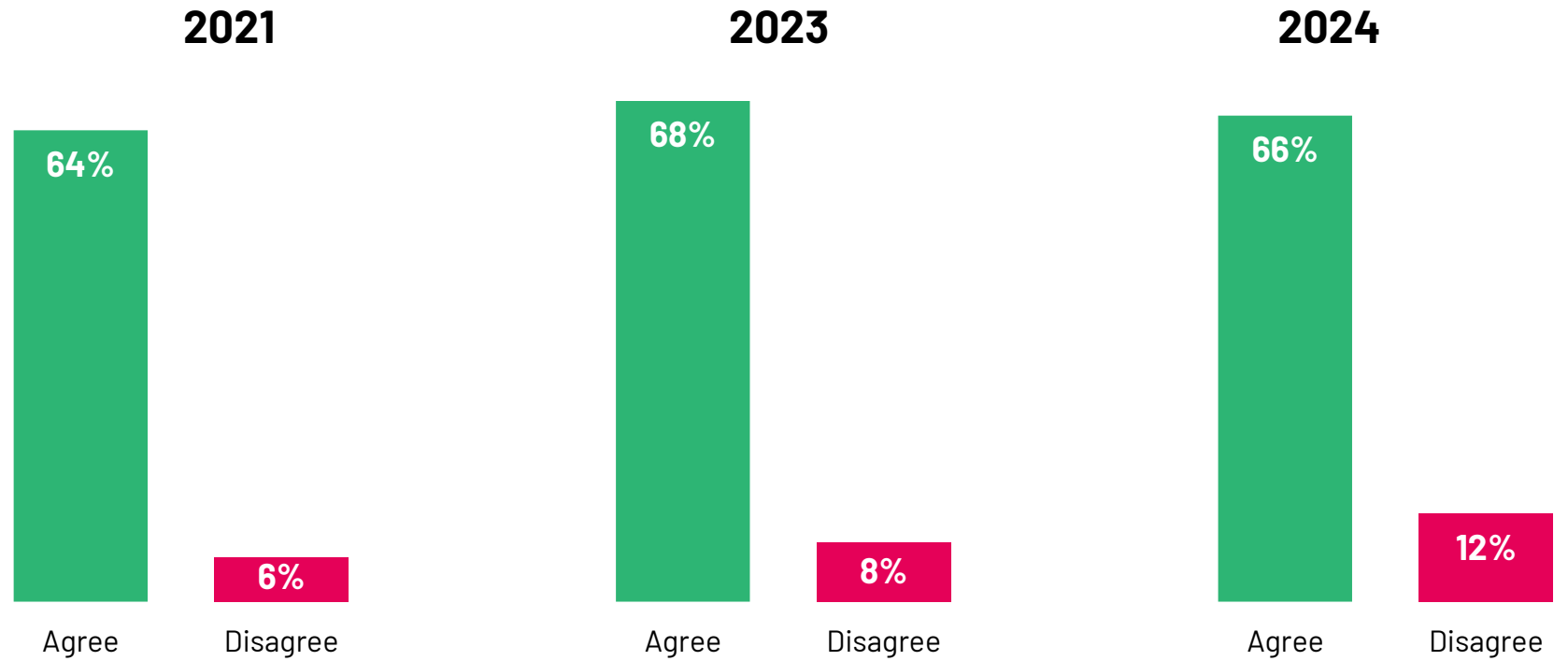
In the U.S., the movement between 2021-23 has been reversed

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

2021

61%	10%
Agree	Disagree

2023

57%	15%
Agree	Disagree

2024

59%	12%
Agree	Disagree
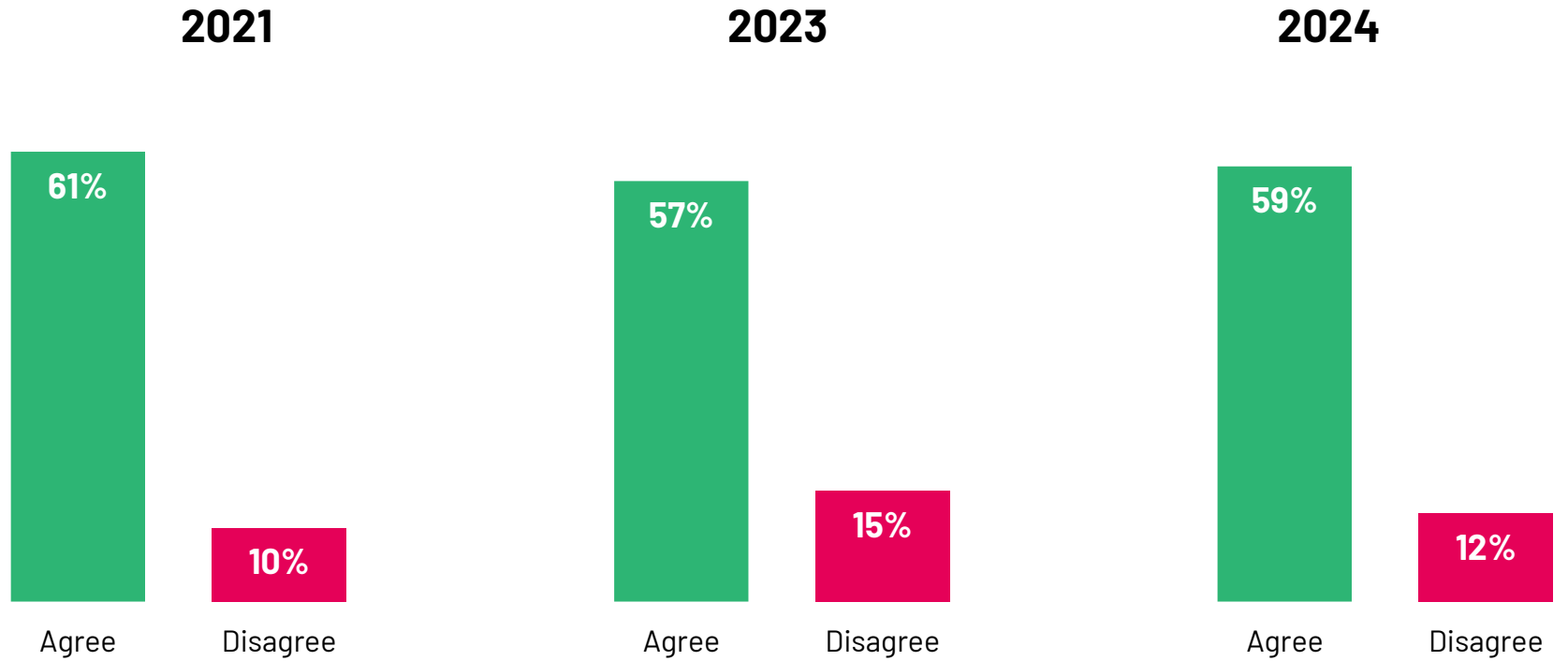
A majority in most countries agree that infrastructure can provide an economic boost...

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...?
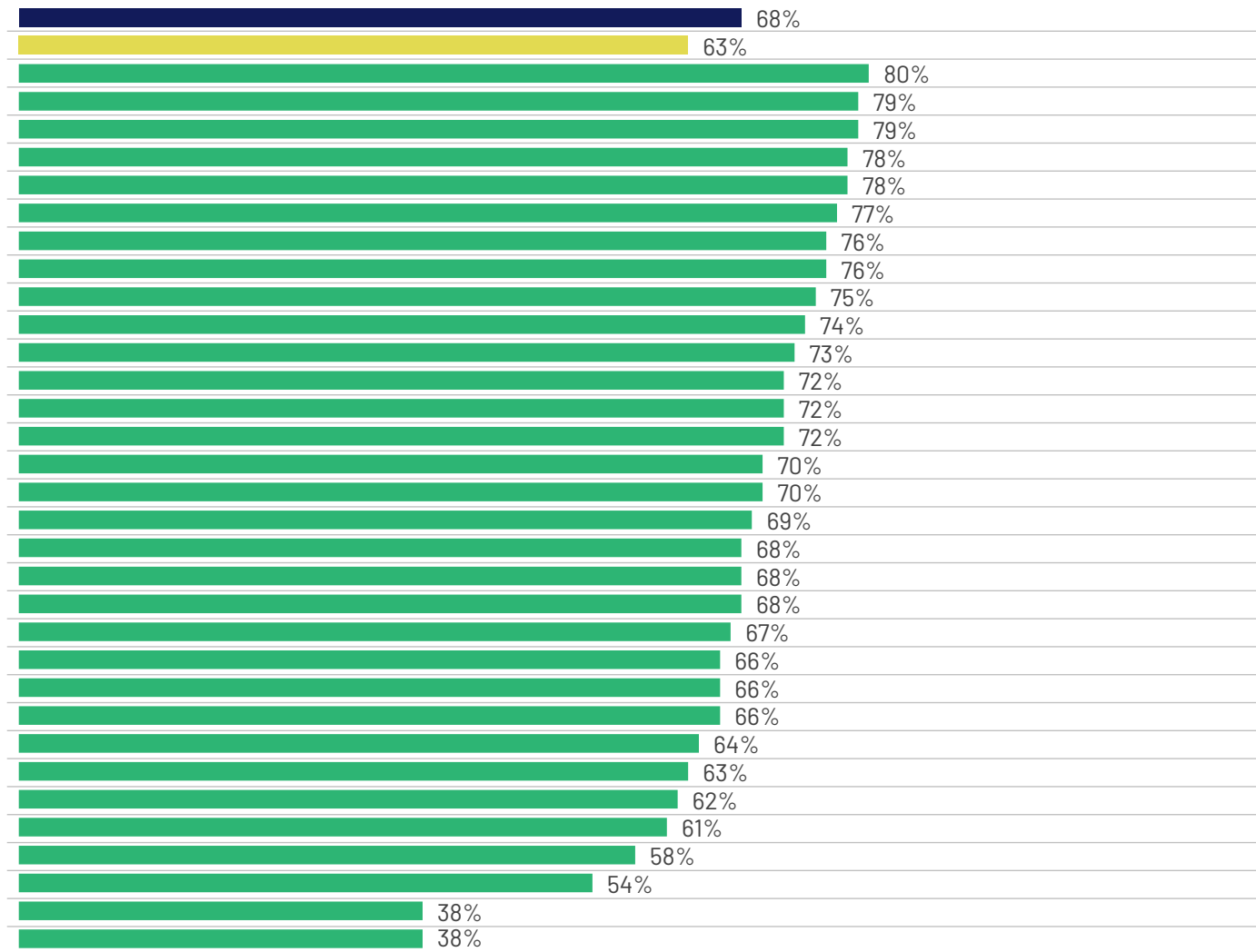
"Investing in infrastructure will create new jobs and boost the economy"

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

Country	% strongly/tend to agree
Global Country Average	68%
G7	63%
South Africa	80%
Indonesia	79%
New Zealand	79%
Philippines	78%
Peru	78%
Colombia	77%
Ireland	76%
Argentina	76%
Australia	75%
Mexico	74%
Brazil	73%
Great Britain	72%
Chile	72%
Thailand	72%
United States	70%
Italy	70%
Canada	69%
India	68%
Malaysia	68%
Singapore	68%
Poland	67%
Romania	66%
Spain	66%
France	66%
Sweden	64%
Netherlands	63%
Türkiye	62%
Belgium	61%
Germany	58%
Hungary	54%
South Korea	38%
Japan	38%

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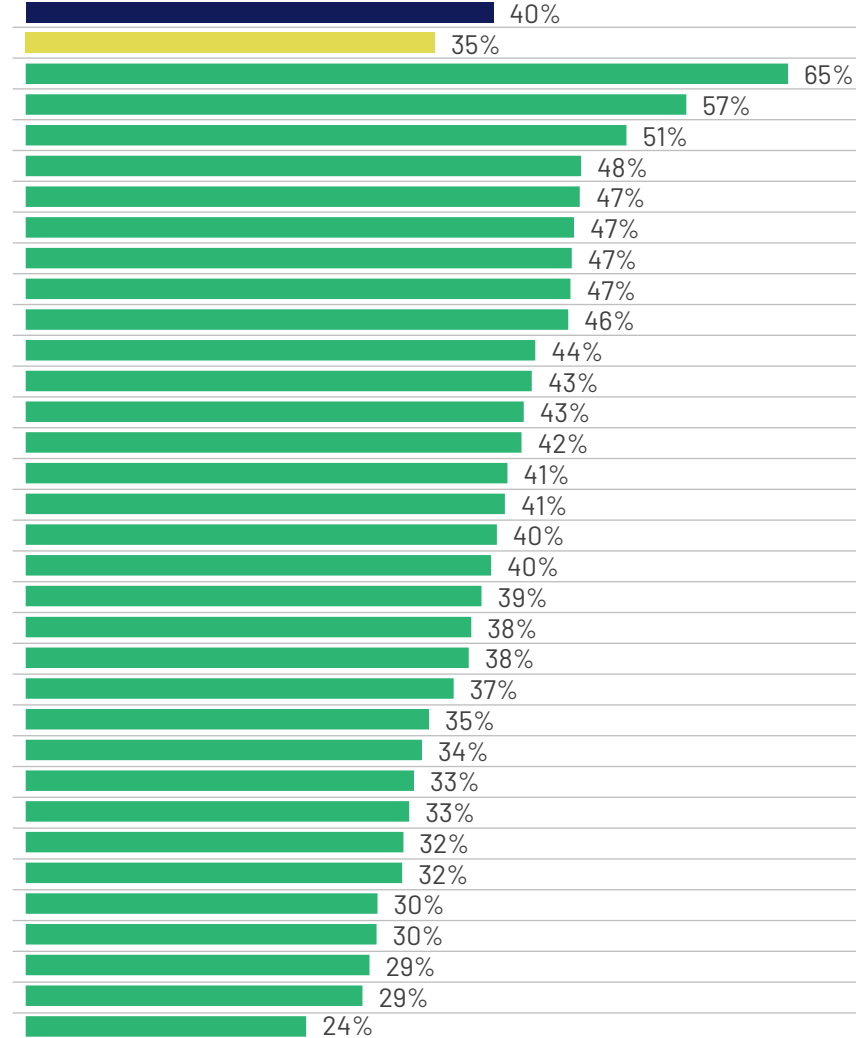
"We should increase spending to improve infrastructure in [COUNTRY], even if that means higher taxes or costs for consumers"

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

Country	% strongly/tend to agree
Global Country Average	40%
G7	35%
India	65%
Thailand	57%
Malaysia	51%
Türkiye	48%
Ireland	47%
Philippines	47%
Singapore	47%
Great Britain	47%
Romania	46%
Poland	44%
Spain	43%
Chile	43%
Indonesia	42%
South Africa	41%
Mexico	41%
Sweden	40%
New Zealand	40%
Brazil	39%
Australia	38%
Italy	38%
Germany	37%
United States	35%
Peru	34%
France	33%
Colombia	33%
Canada	32%
South Korea	32%
Hungary	30%
Belgium	30%
Argentina	29%
Netherlands	29%
Japan	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…?
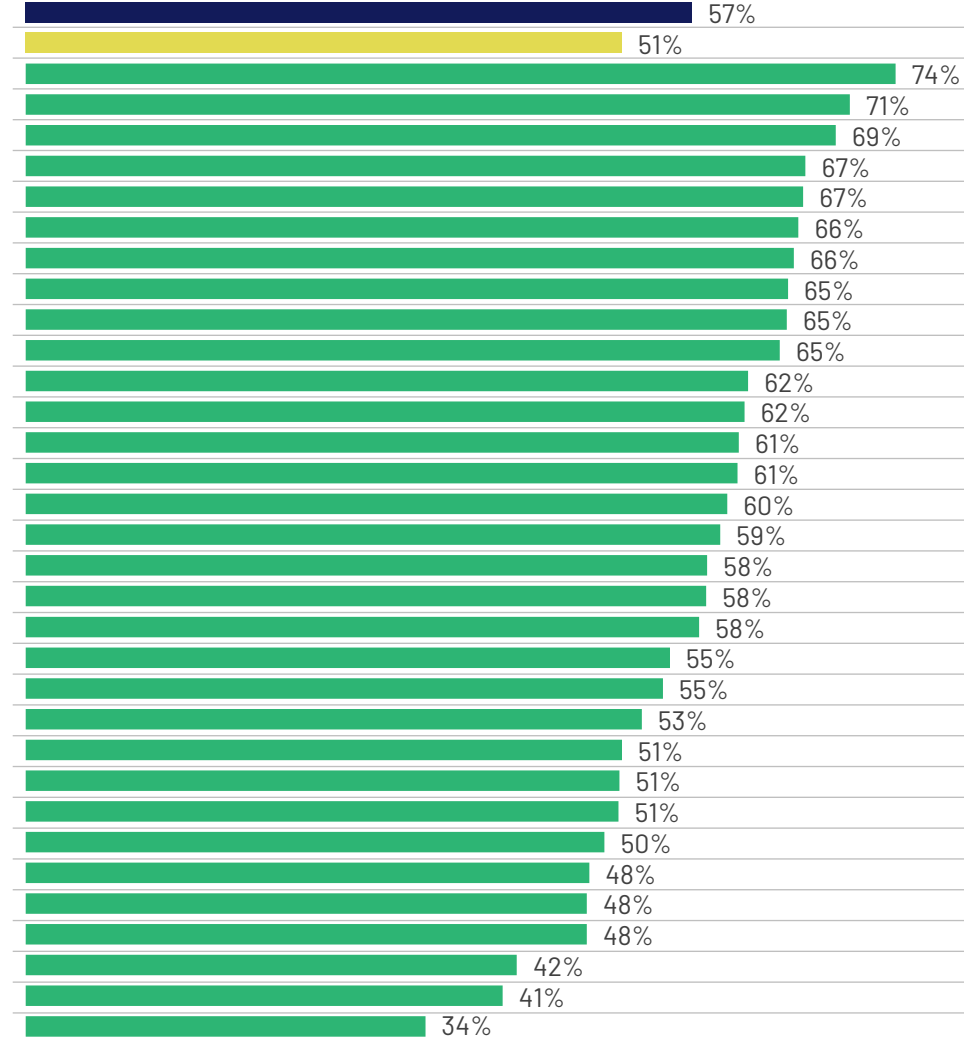
"Investing in infrastructure in [COUNTRY] will make an important contribution to combating climate change"

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

Country	% strongly/tend to agree
Global Country Average	57%
G7	51%
South Africa	74%
Brazil	71%
Thailand	69%
Indonesia	67%
Great Britain	67%
Ireland	66%
Malaysia	66%
India	65%
Singapore	65%
Mexico	65%
Philippines	62%
Colombia	62%
Argentina	61%
Peru	61%
Türkiye	60%
Spain	59%
Chile	58%
New Zealand	58%
Italy	58%
Sweden	55%
Australia	55%
United States	53%
Poland	51%
Belgium	51%
France	51%
South Korea	50%
Romania	48%
Canada	48%
Germany	48%
Netherlands	42%
Hungary	41%
Japan	34%

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…?
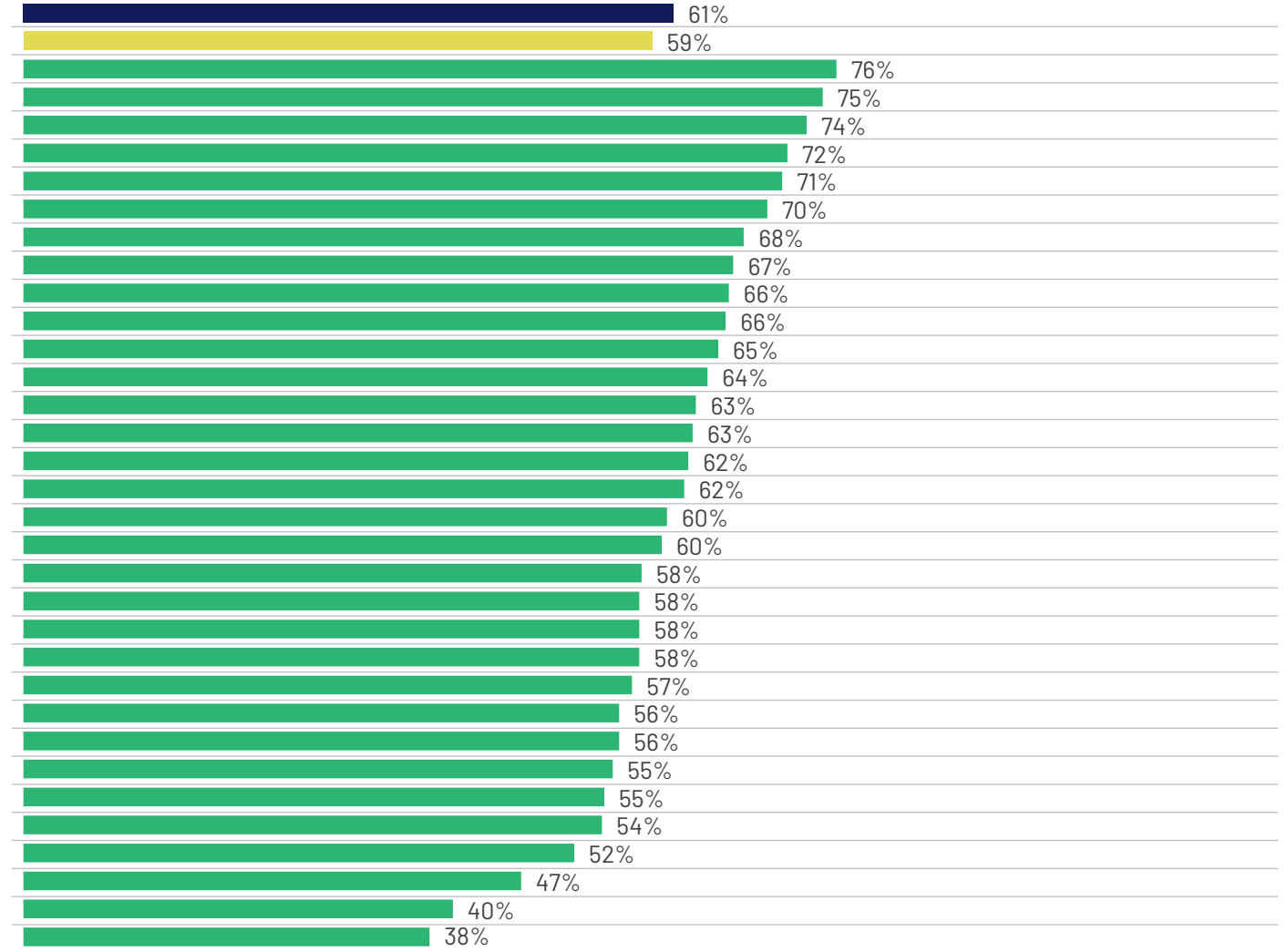
"I don't think infrastructure in [COUNTRY] has been adapted enough to cope with future changes in the climate"

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

Country	% strongly/tend to agree
Global Country Average	61%
G7	59%
South Africa	76%
Thailand	75%
Peru	74%
Brazil	72%
Italy	71%
New Zealand	70%
Argentina	68%
Great Britain	67%
Romania	66%
Colombia	66%
Mexico	65%
Ireland	64%
India	63%
Belgium	63%
Germany	62%
Philippines	62%
Hungary	60%
France	60%
Indonesia	58%
Chile	58%
Spain	58%
United States	58%
Australia	57%
Poland	56%
Türkiye	56%
Malaysia	55%
Canada	55%
Sweden	54%
South Korea	52%
Netherlands	47%
Singapore	40%
Japan	38%

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...?
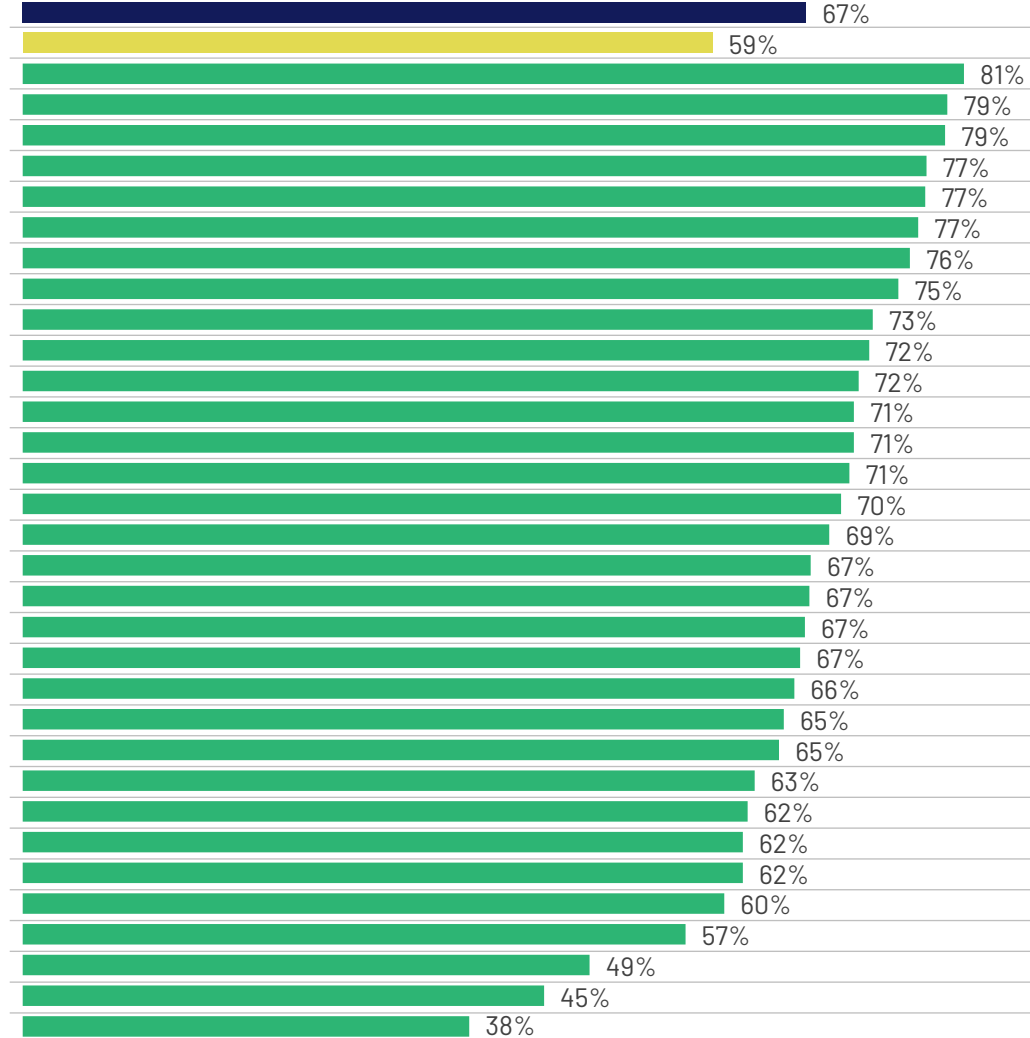
"I'm fine with companies in the private sector investing money in [COUNTRY'S] infrastructure, if it means we get the improvements we need"

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

Country	% strongly/tend to agree
Global Country Average	67%
G7	59%
Indonesia	81%
Peru	79%
South Africa	79%
Colombia	77%
Mexico	77%
Philippines	77%
Thailand	76%
Argentina	75%
Romania	73%
Brazil	72%
Spain	72%
Chile	71%
Malaysia	71%
Türkiye	71%
Ireland	70%
New Zealand	69%
Italy	67%
Singapore	67%
Poland	67%
India	67%
Sweden	66%
Great Britain	65%
France	65%
Canada	63%
Australia	62%
Belgium	62%
Netherlands	62%
United States	60%
Germany	57%
Hungary	49%
South Korea	45%
Japan	38%

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…?
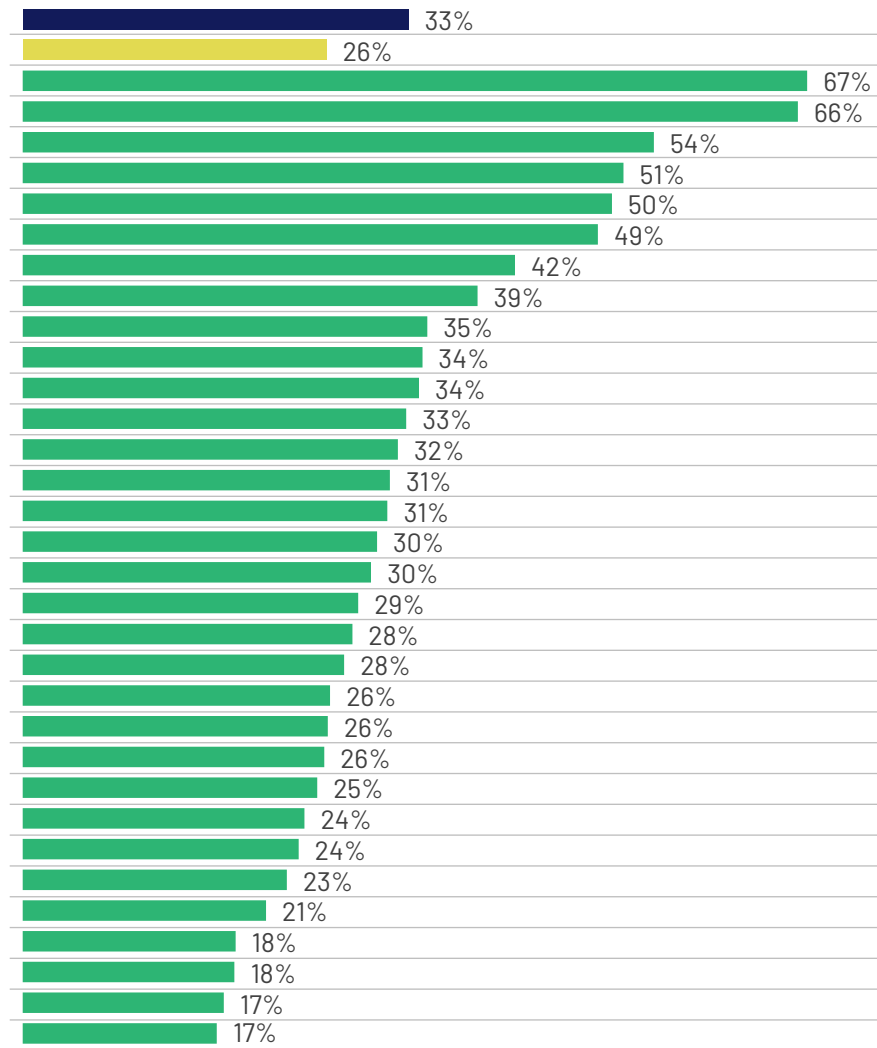
"[COUNTRY] **has a good record of delivering national infrastructure projects"**

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

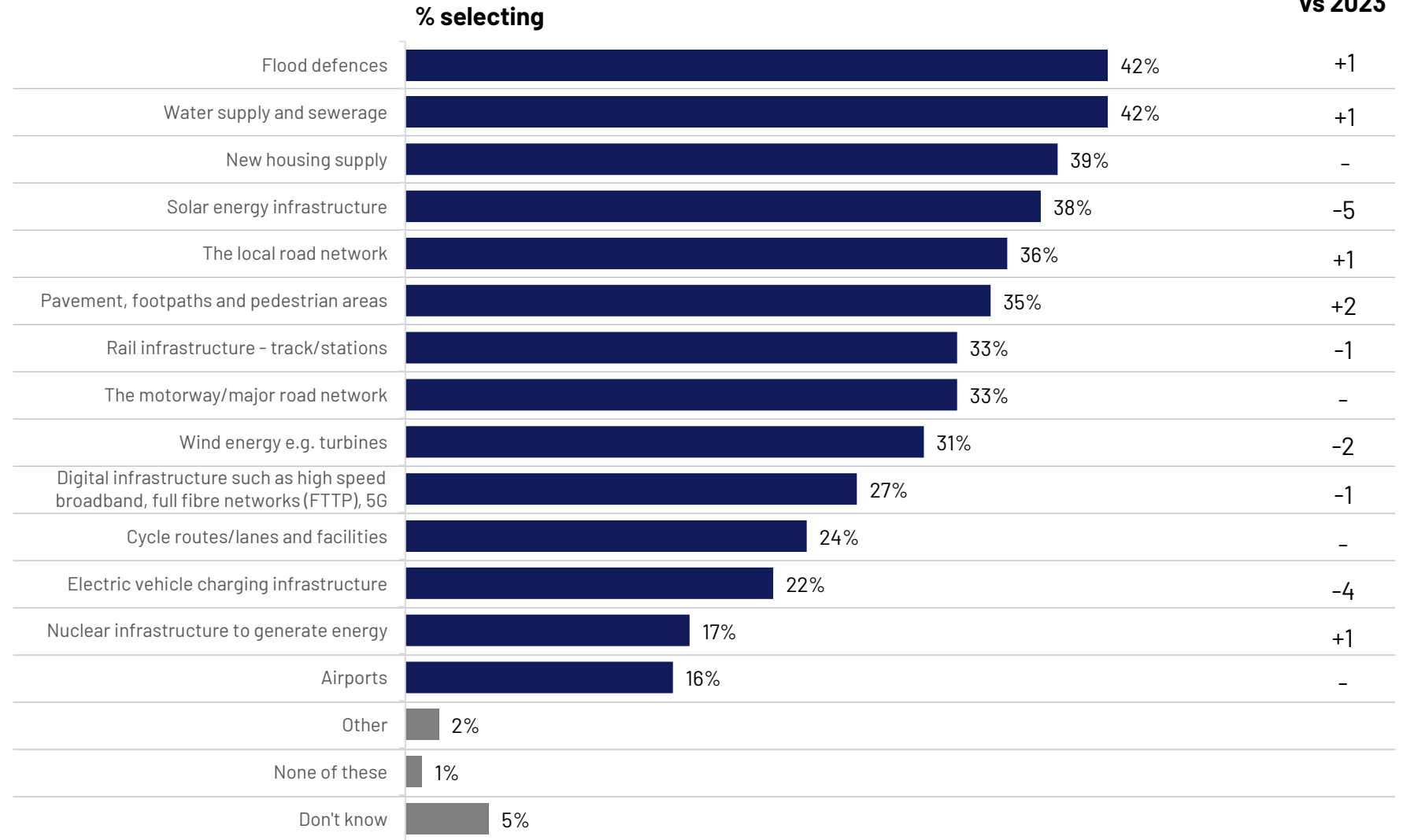| Country	% strongly/tend to agree
Global Country Average	33%
G7	26%
Singapore	67%
India	66%
Thailand	54%
Indonesia	51%
Malaysia	50%
Netherlands	49%
Philippines	42%
Sweden	39%
South Korea	35%
Chile	34%
Türkiye	34%
Spain	33%
Mexico	32%
Italy	31%
Australia	31%
Poland	30%
Ireland	30%
United States	29%
South Africa	28%
Brazil	28%
Germany	26%
Japan	26%
Great Britain	26%
Argentina	25%
Peru	24%
Canada	24%
France	23%
Belgium	21%
Colombia	18%
Romania	18%
Hungary	17%
New Zealand	17%

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]?
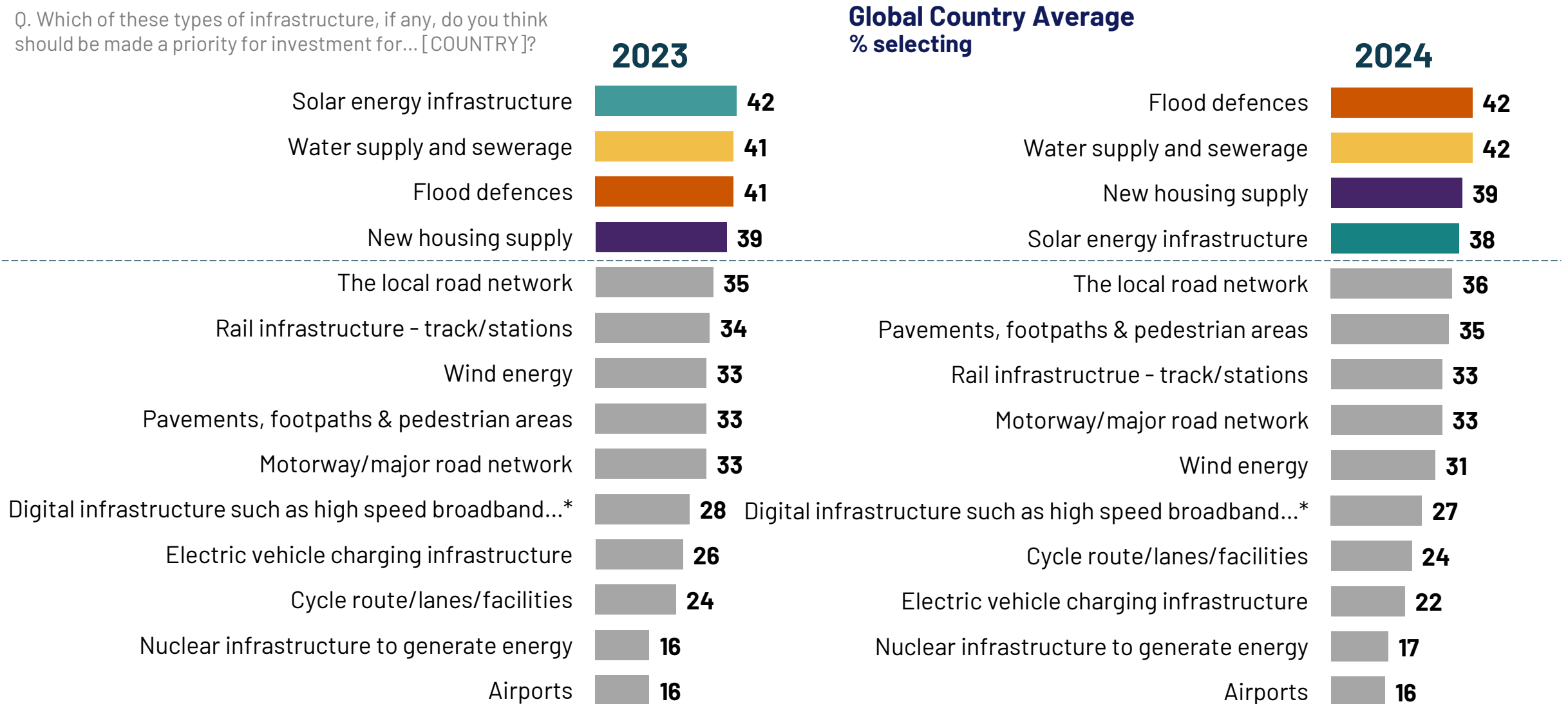
Base: 23,530 adults (online), 32 countries
May–June 2024

Global Country Average

% selecting

	% selecting	+ % change vs 2023
Flood defences	42%	+1
Water supply and sewerage	42%	+1
New housing supply	39%	–
Solar energy infrastructure	38%	–5
The local road network	36%	+1
Pavement, footpaths and pedestrian areas	35%	+2
Rail infrastructure - track/stations	33%	–1
The motorway/major road network	33%	–
Wind energy e.g. turbines	31%	–2
Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G	27%	–1
Cycle routes/lanes and facilities	24%	–
Electric vehicle charging infrastructure	22%	–4
Nuclear infrastructure to generate energy	17%	+1
Airports	16%	–
Other	2%	
None of these	1%	
Don't know	5%	

Ipsos

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]?
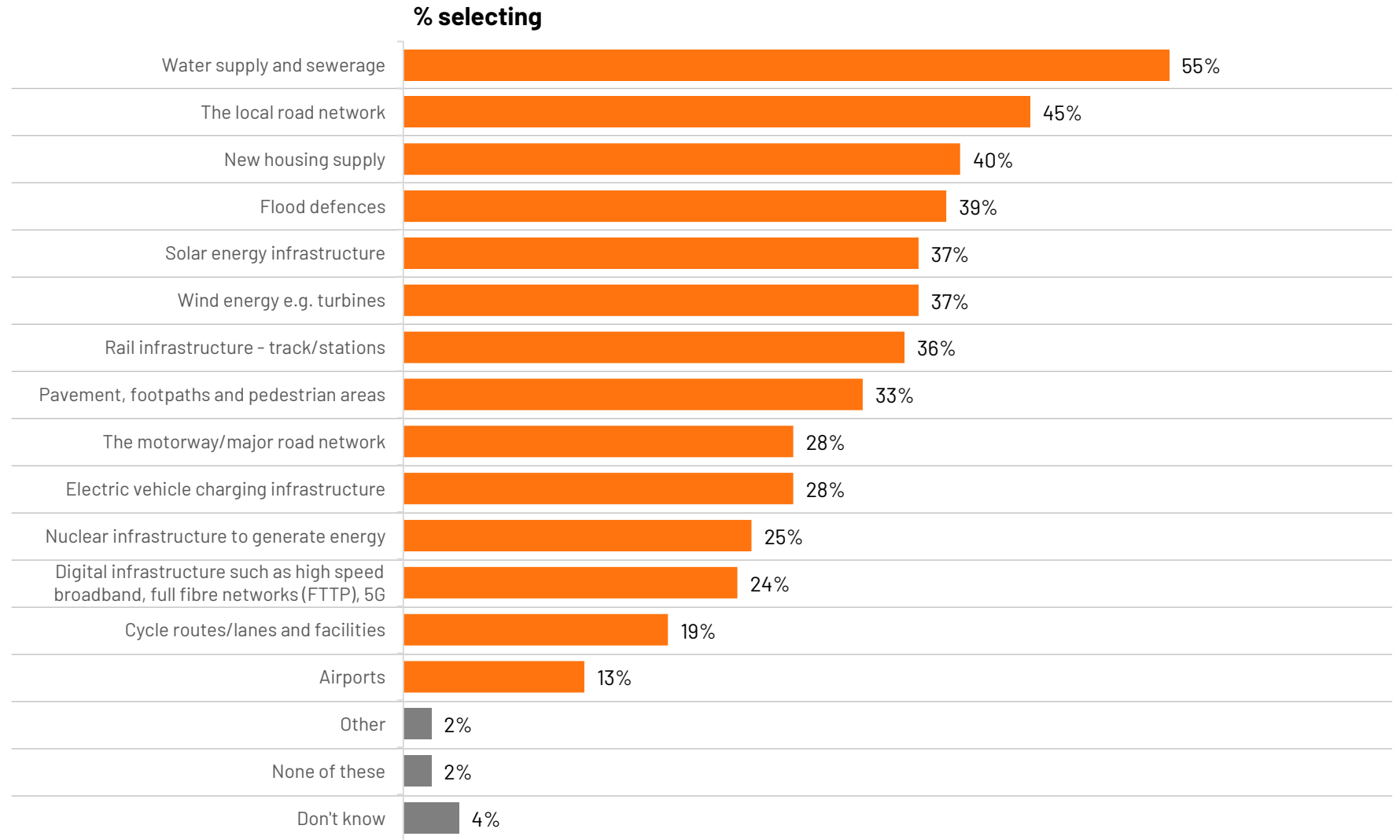
Global Country Average
% selecting

2023

Infrastructure	%
Solar energy infrastructure	42
Water supply and sewerage	41
Flood defences	41
New housing supply	39
The local road network	35
Rail infrastructure - track/stations	34
Wind energy	33
Pavements, footpaths & pedestrian areas	33
Motorway/major road network	33
Digital infrastructure such as high speed broadband...*	28
Electric vehicle charging infrastructure	26
Cycle route/lanes/facilities	24
Nuclear infrastructure to generate energy	16
Airports	16

2024

Infrastructure	%
Flood defences	42
Water supply and sewerage	42
New housing supply	39
Solar energy infrastructure	38
The local road network	36
Pavements, footpaths & pedestrian areas	35
Rail infrastructrue - track/stations	33
Motorway/major road network	33
Wind energy	31
Digital infrastructure such as high speed broadband...*	27
Cycle route/lanes/facilities	24
Electric vehicle charging infrastructure	22
Nuclear infrastructure to generate energy	17
Airports	16

Ipsos

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
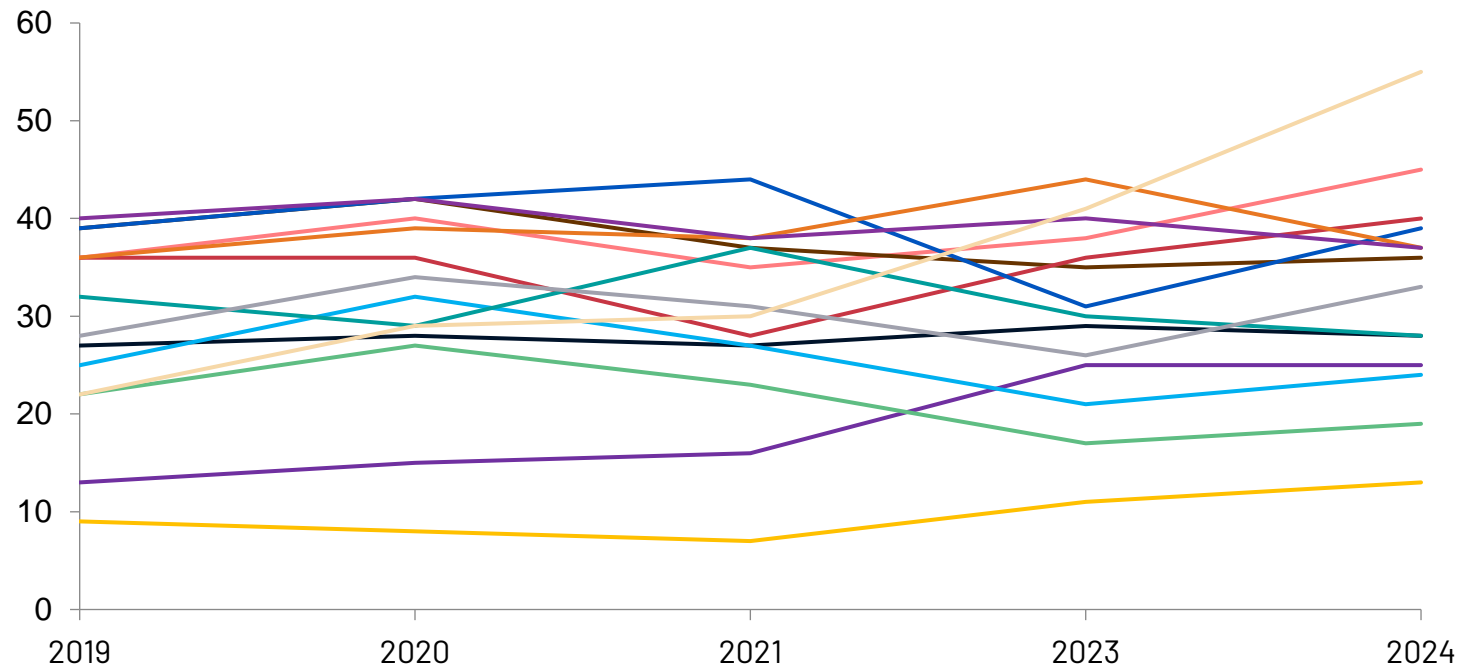May-June 2024 – 1,001 in GB

% selecting

Infrastructure type	%
Water supply and sewerage	55%
The local road network	45%
New housing supply	40%
Flood defences	39%
Solar energy infrastructure	37%
Wind energy e.g. turbines	37%
Rail infrastructure - track/stations	36%
Pavement, footpaths and pedestrian areas	33%
The motorway/major road network	28%
Electric vehicle charging infrastructure	28%
Nuclear infrastructure to generate energy	25%
Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G	24%
Cycle routes/lanes and facilities	19%
Airports	13%
Other	2%
None of these	2%
Don't know	4%

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?

% selecting

Change vs 2023 >+5

Water supply +14

Local road network +7

Wind energy -7
Flood defences +8
Pavements +7

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

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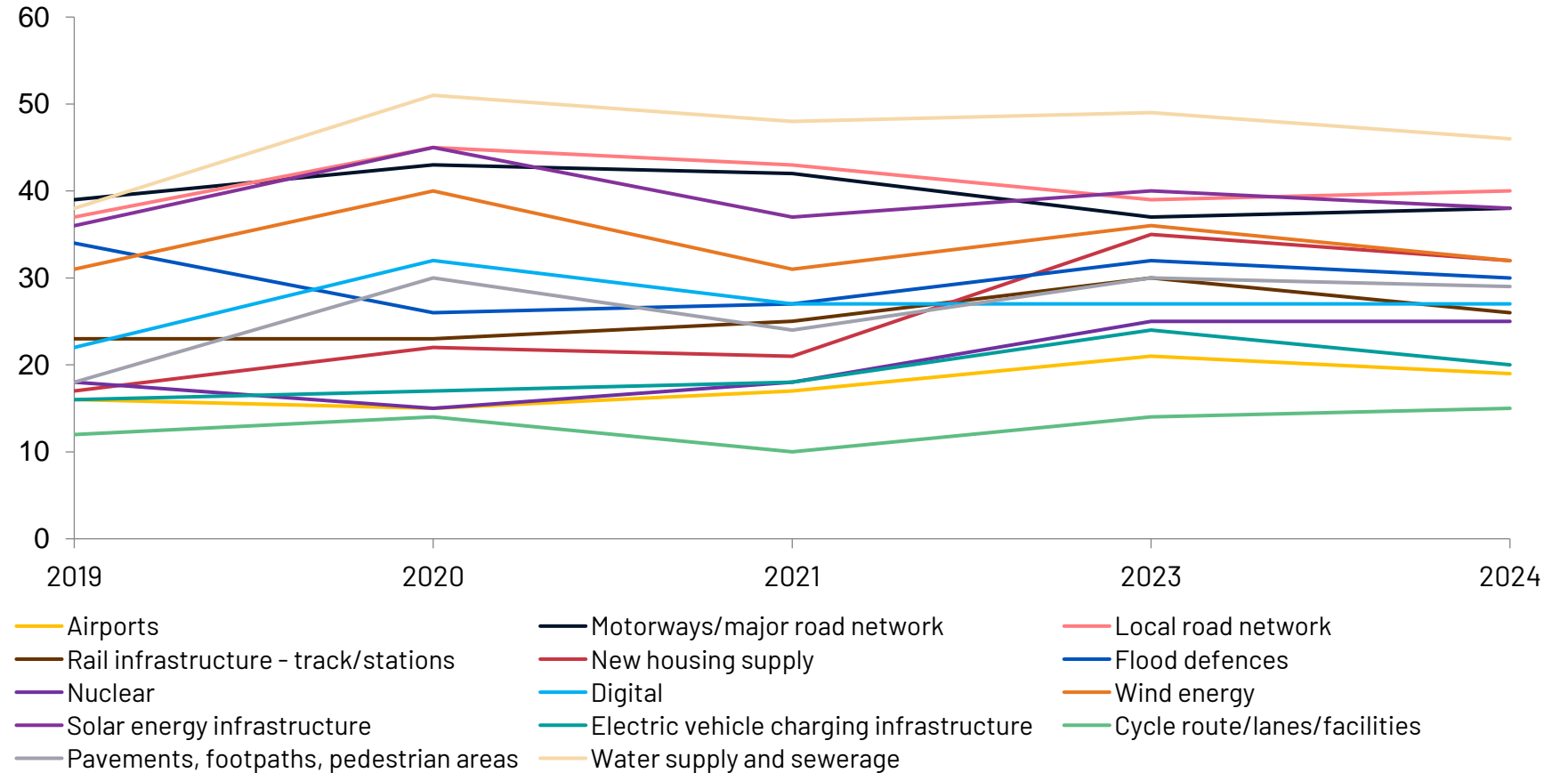
Base: 23,530 adults (online), 32 countries
May-June 2024 – 1,001 in US

% selecting

Infrastructure type	%
Water supply and sewerage	46%
The local road network	40%
Solar energy infrastructure	38%
The motorway/major road network	38%
New housing supply	32%
Wind energy e.g. turbines	32%
Flood defences	30%
Pavement, footpaths and pedestrian areas	29%
Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G	27%
Rail infrastructure - track/stations	26%
Nuclear infrastructure to generate energy	25%
Electric vehicle charging infrastructure	20%
Airports	19%
Cycle routes/lanes and facilities	15%
Other	2%
None of these	2%
Don't know	8%

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

N.B. no changes >+5 vs 2023

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

% selecting

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

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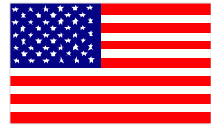
APPENDIX

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/

Ipsos

ben.marshall@ipsos.com

GIIA Global Infrastructure Investor Association

VBenn@giia.net