GLOBAL INFRASTRUCTURE INDEX 2024

32 country study, 24 May – 7 June 2024

Global Summary

In partnership with:

Global Infrastructure Investor Association

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Ipsos

SATISFACTION & ATTITUDES

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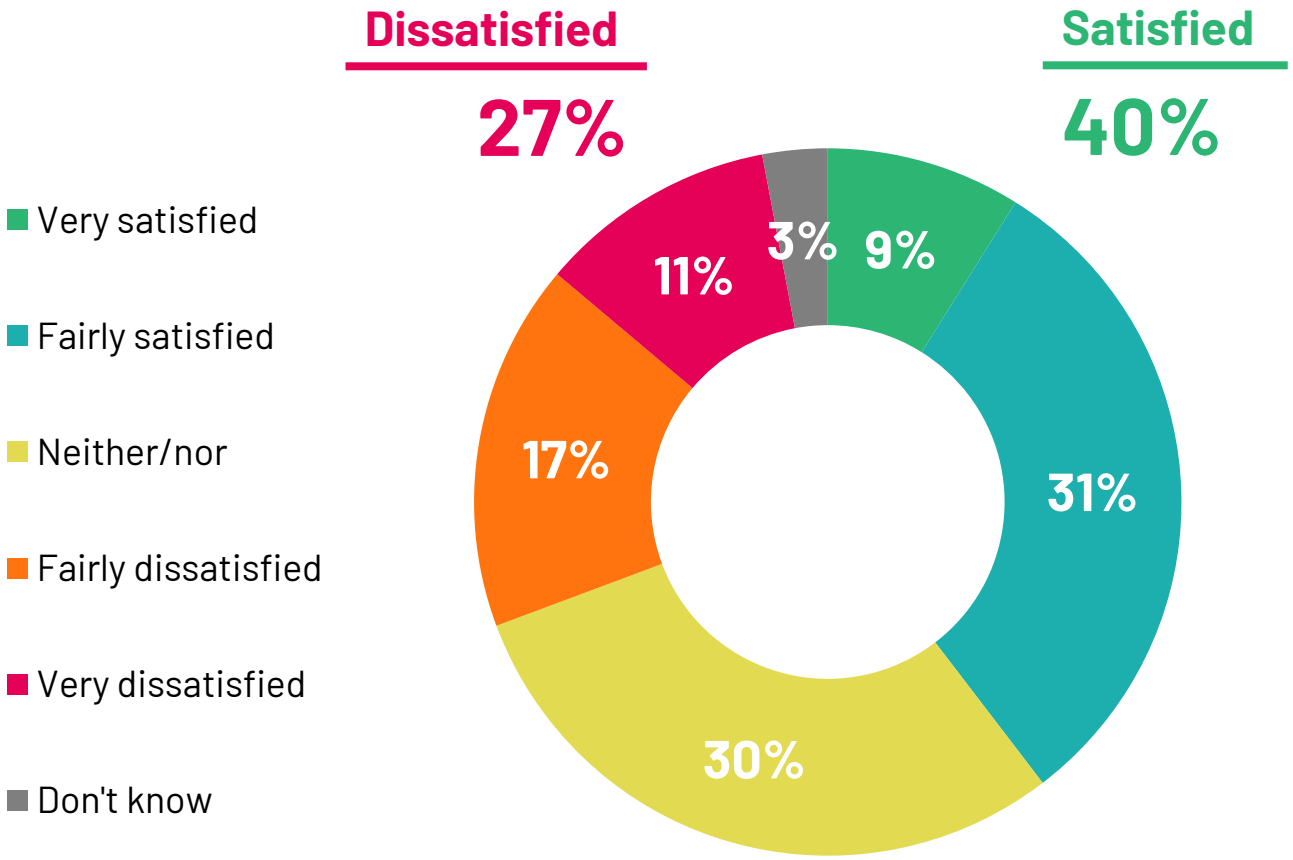
A higher proportion are satisfied with infrastructure than are not, but many are unsure

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

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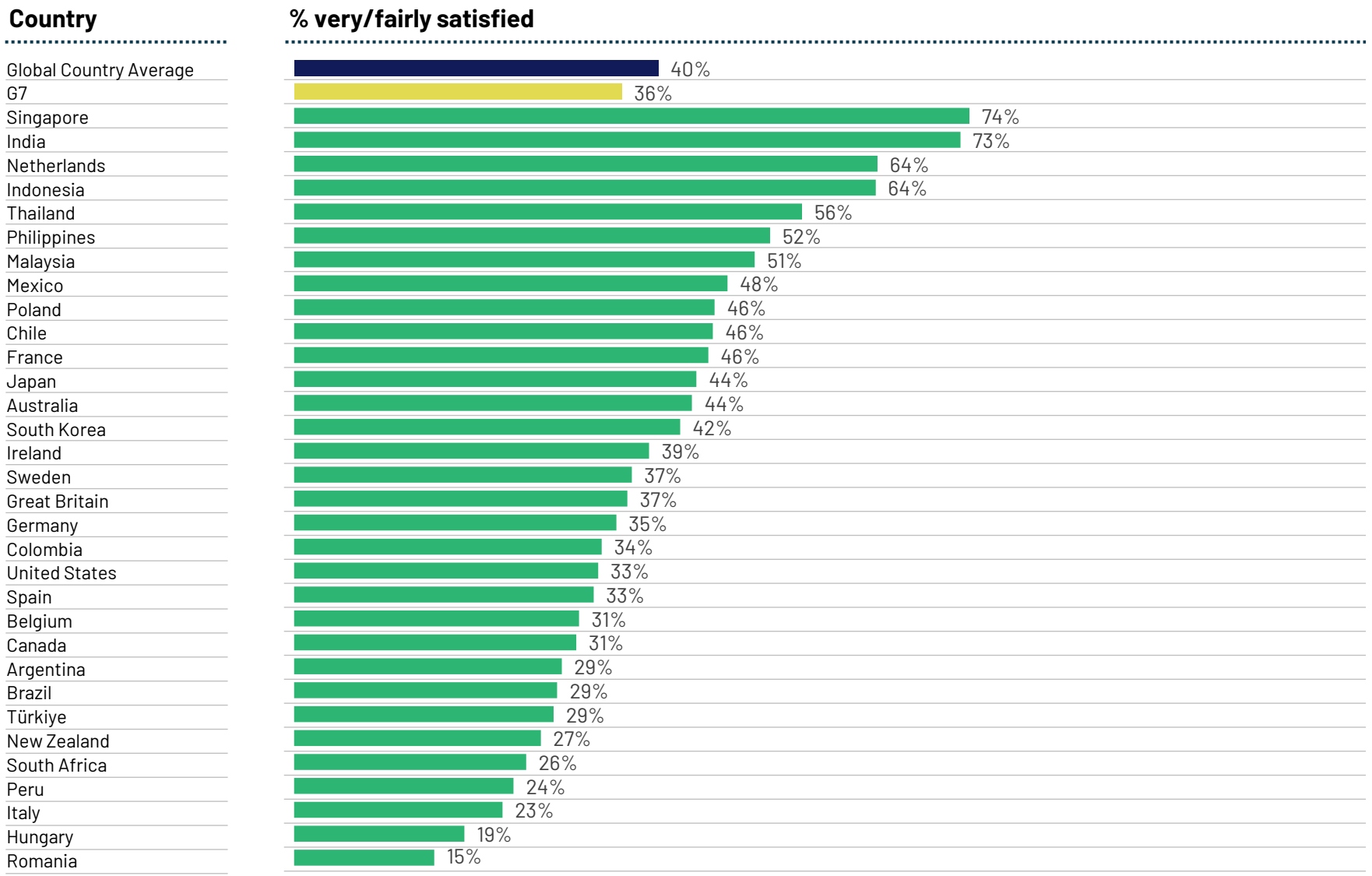

Satisfaction is relatively higher in APAC but similar elsewhere

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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 ( ).

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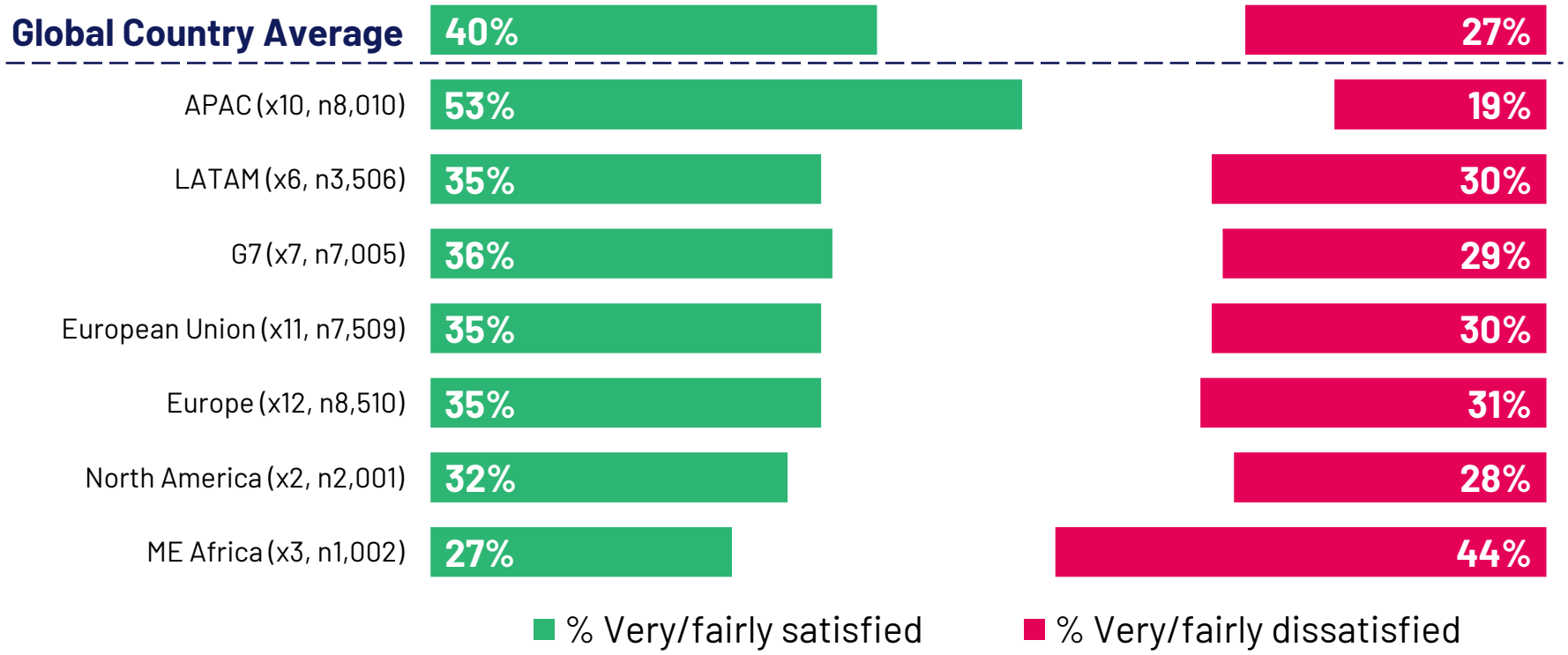
May-June 2024



Source: Ipsos/GIIA

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

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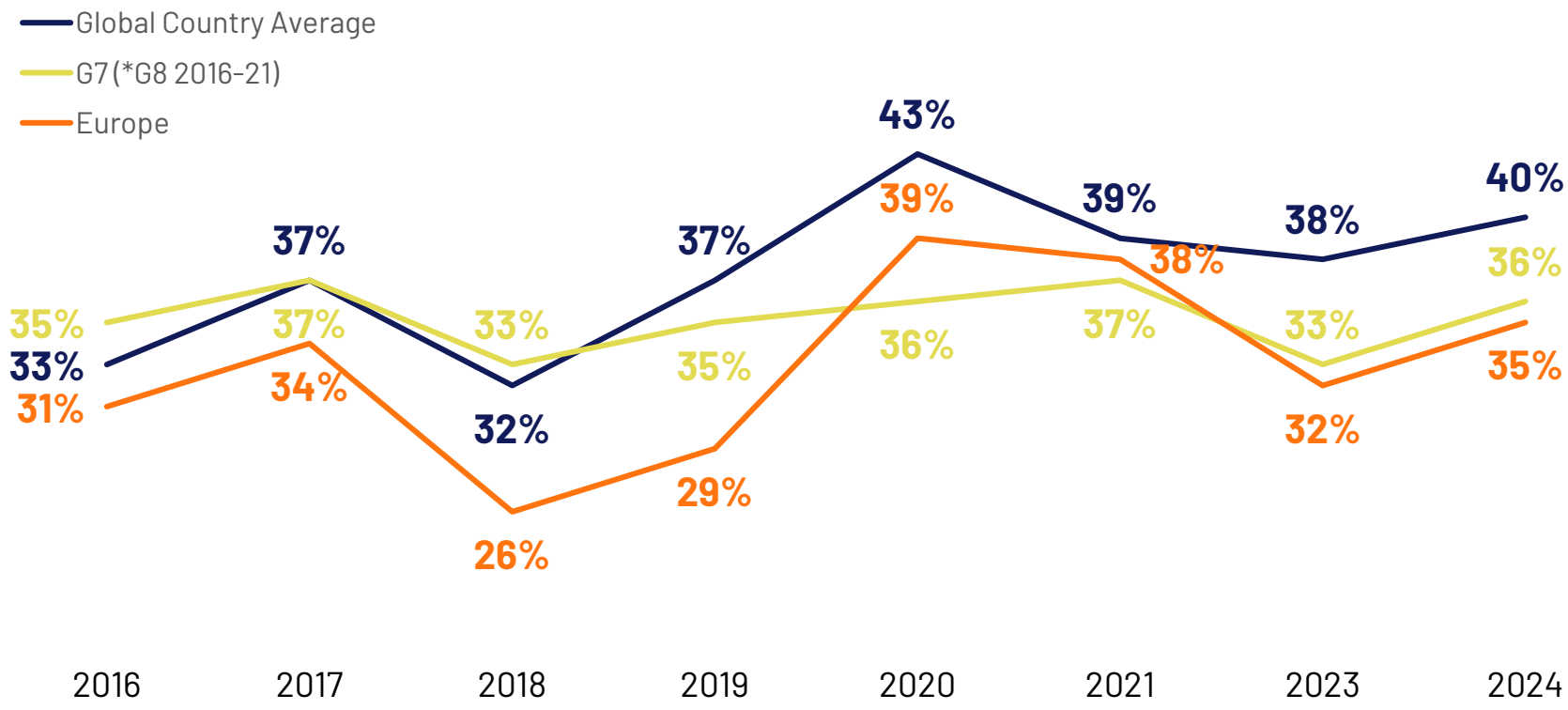
% very/fairly satisfied



Source: Ipsos/GIIA

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

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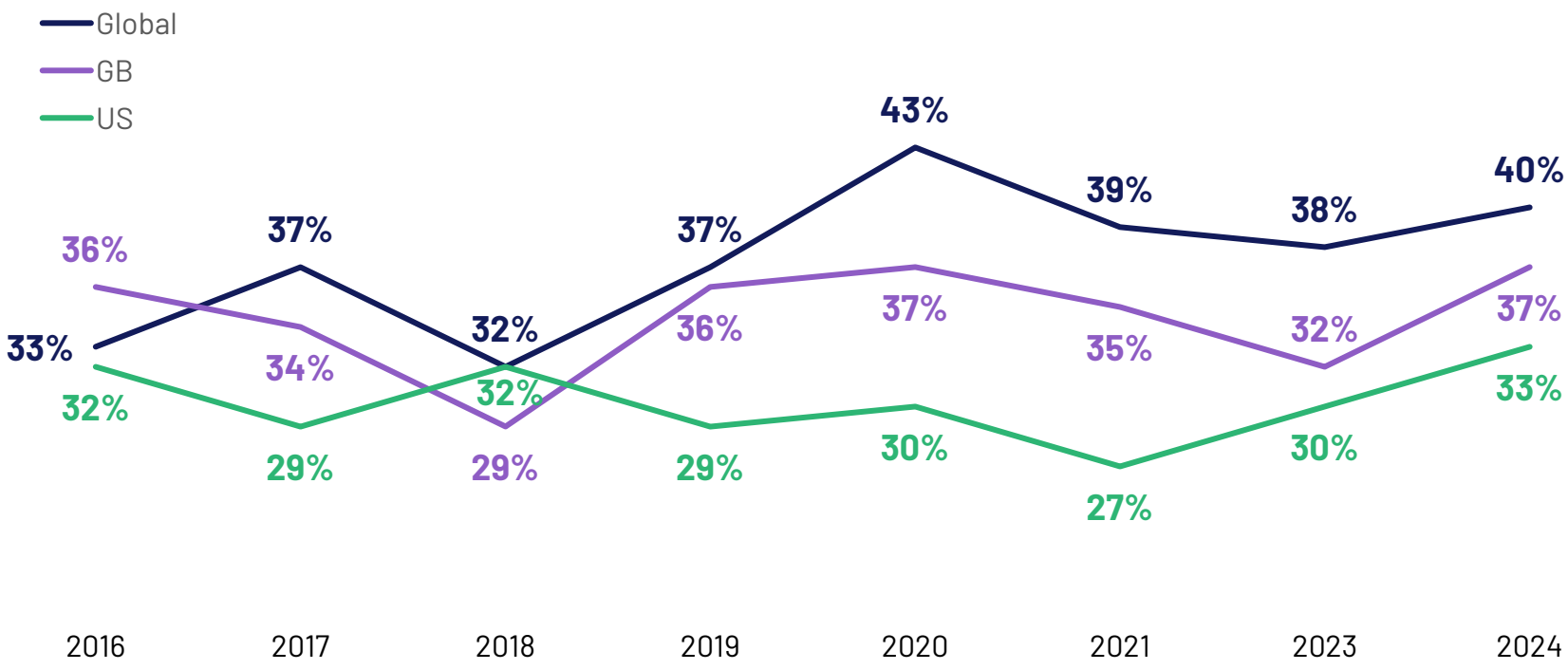

Source: Ipsos/GIIA

INFRASTRUCTURE SECTORS

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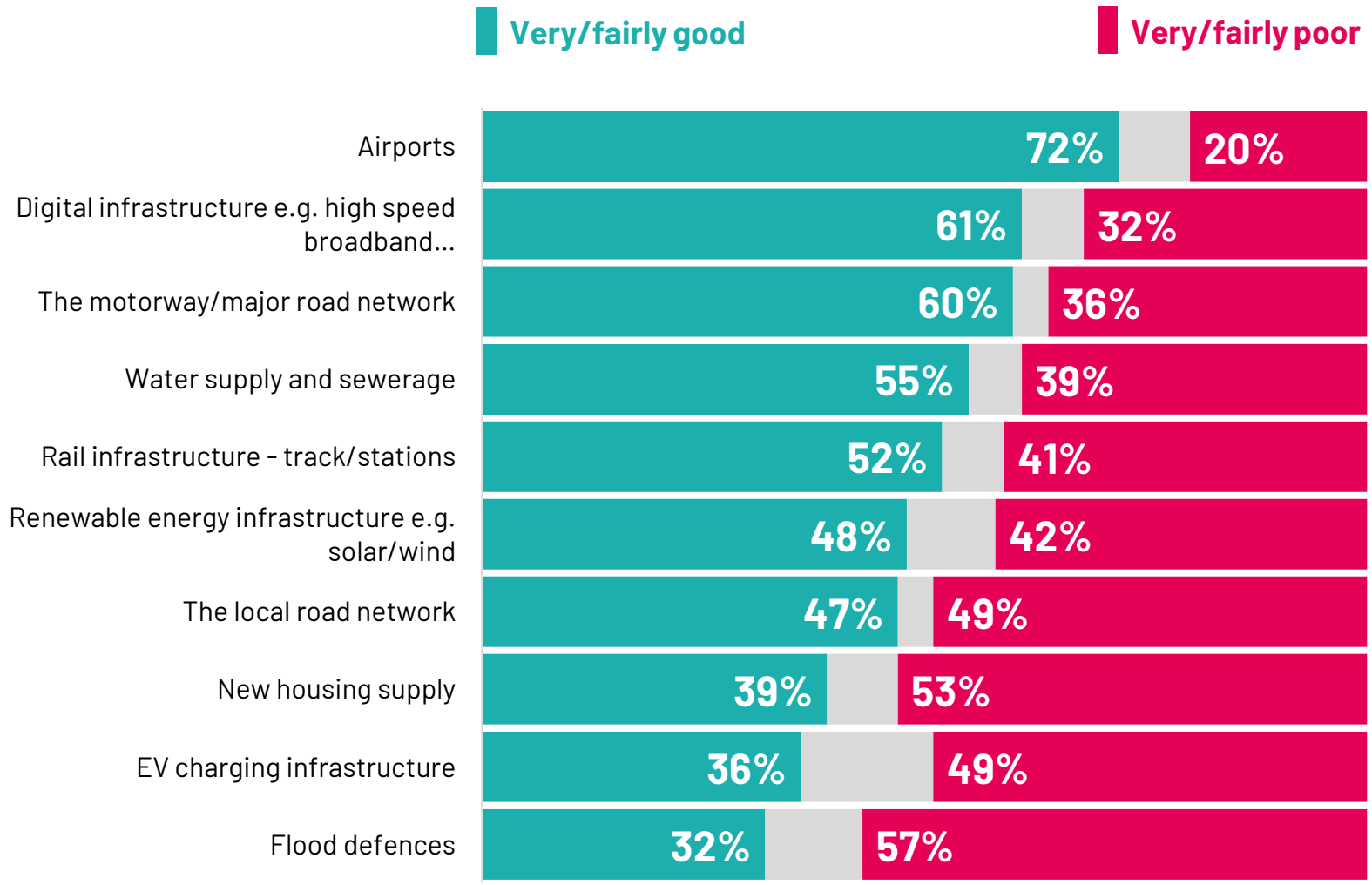
There is variation in how different sectors are seen

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*



Source: Ipsos/GIIA

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

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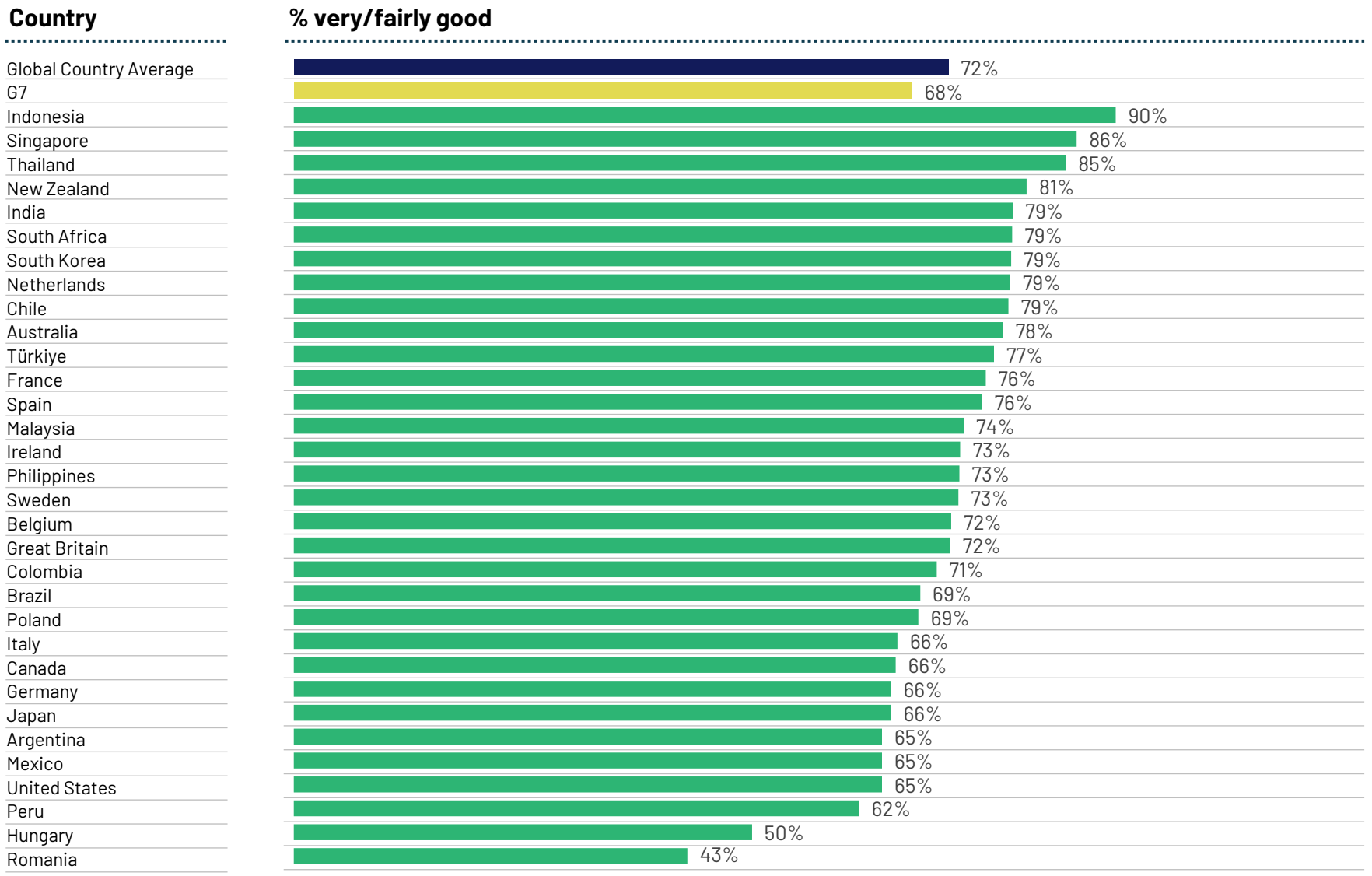

Ratings – Motorway/major road network

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

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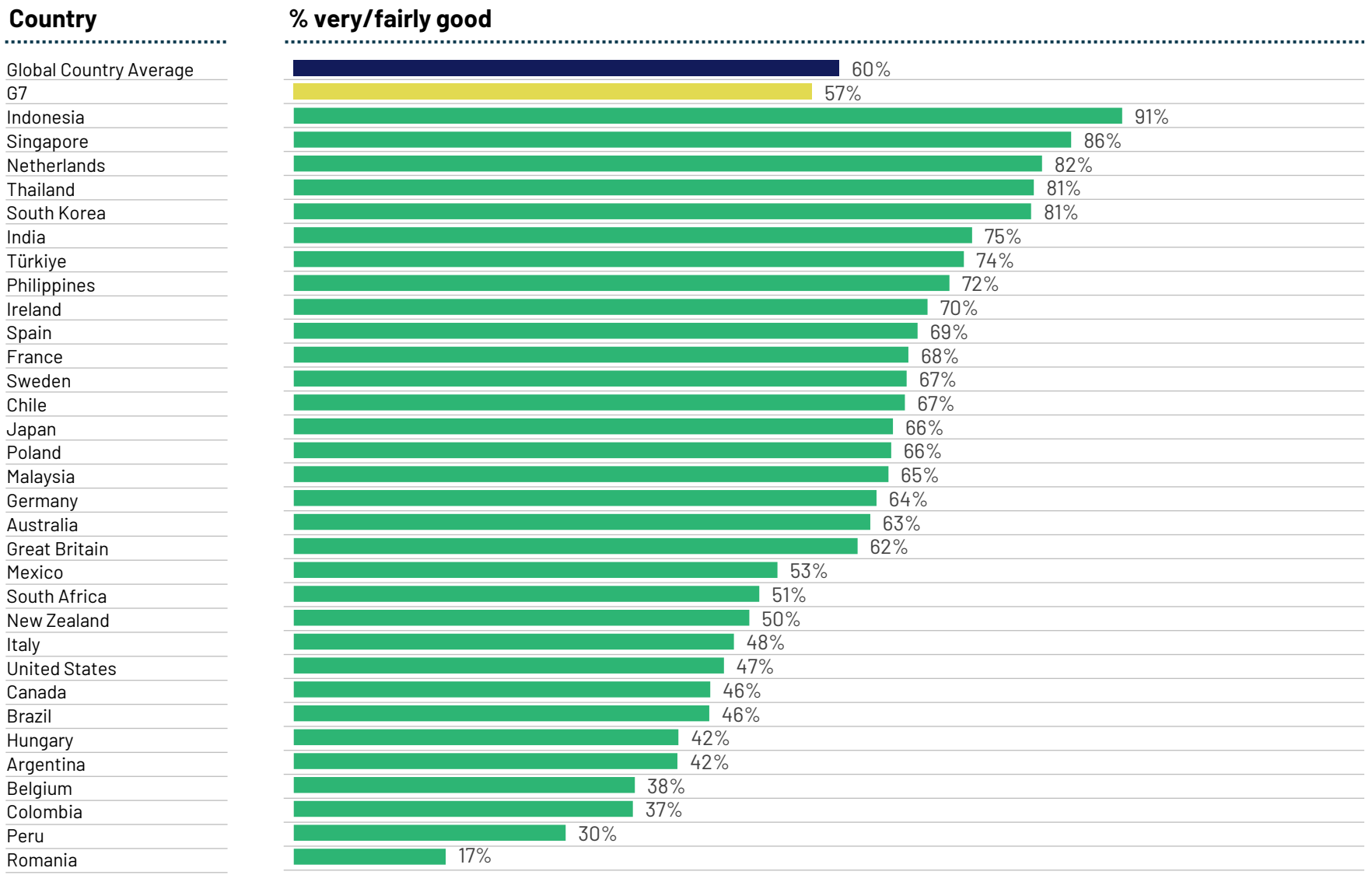


Source: Ipsos/GIIA

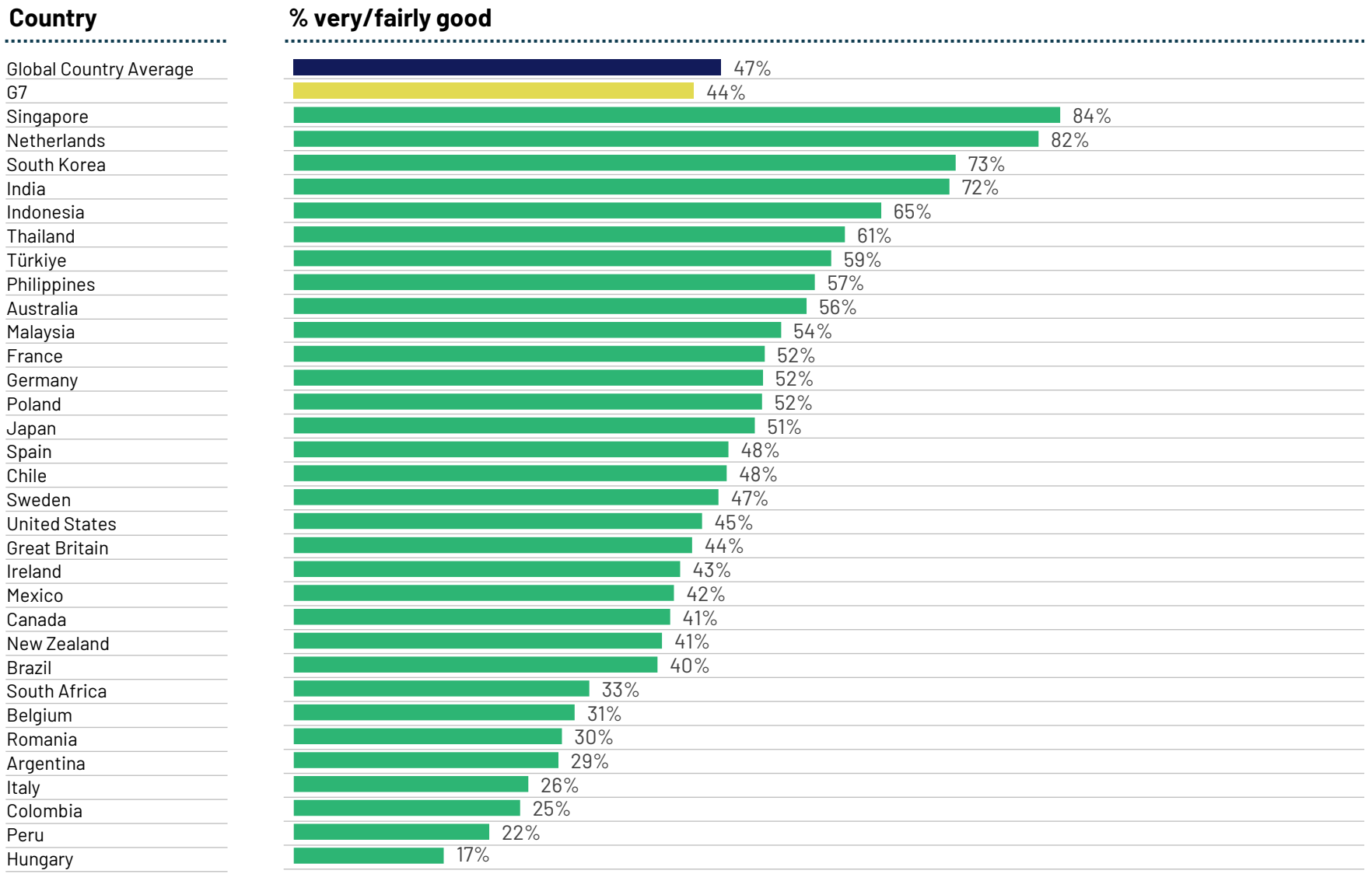
Ratings – Local road network

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



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

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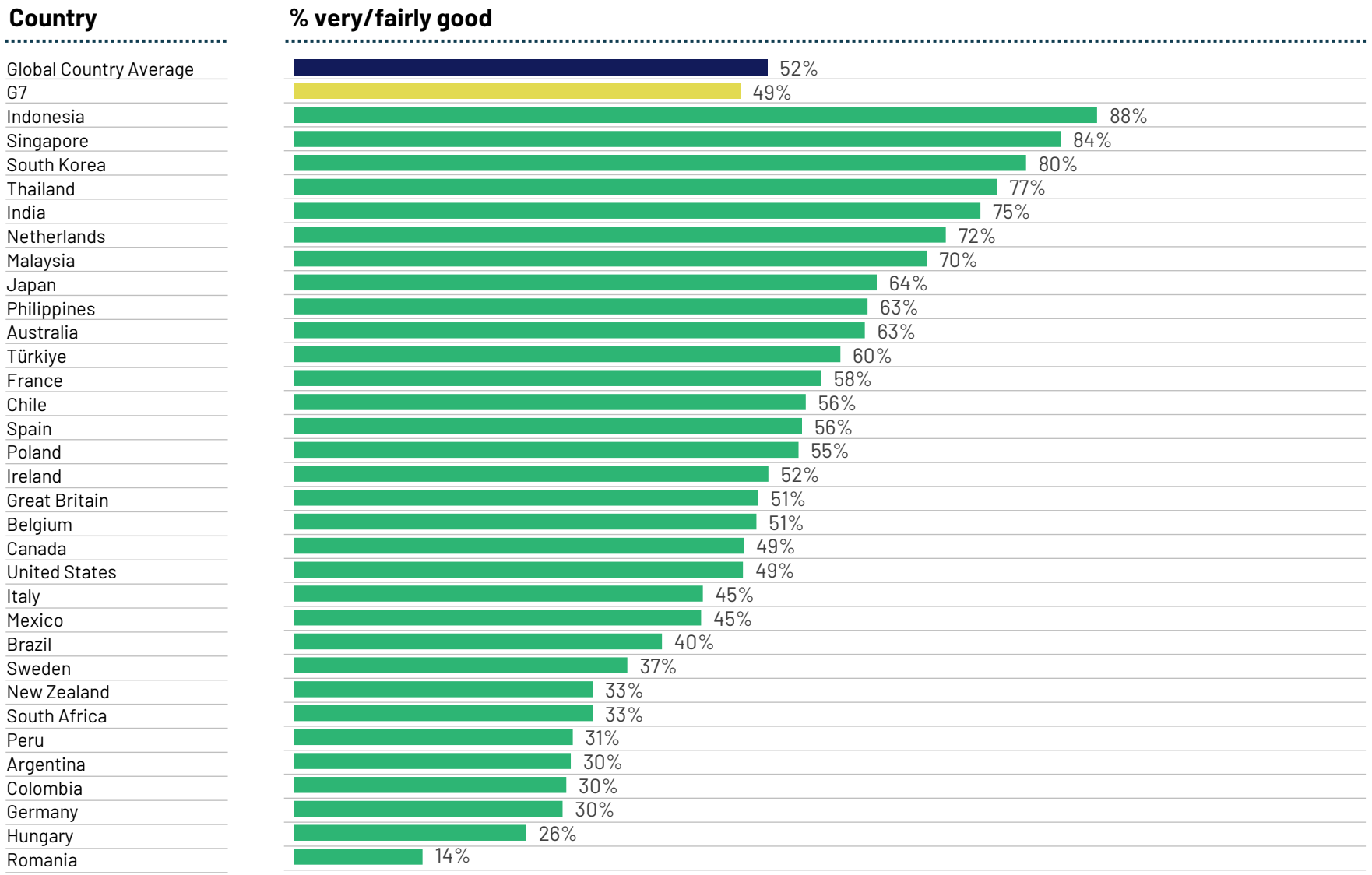

Source: Ipsos/GIIA

Ratings – New housing supply

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

New housing supply

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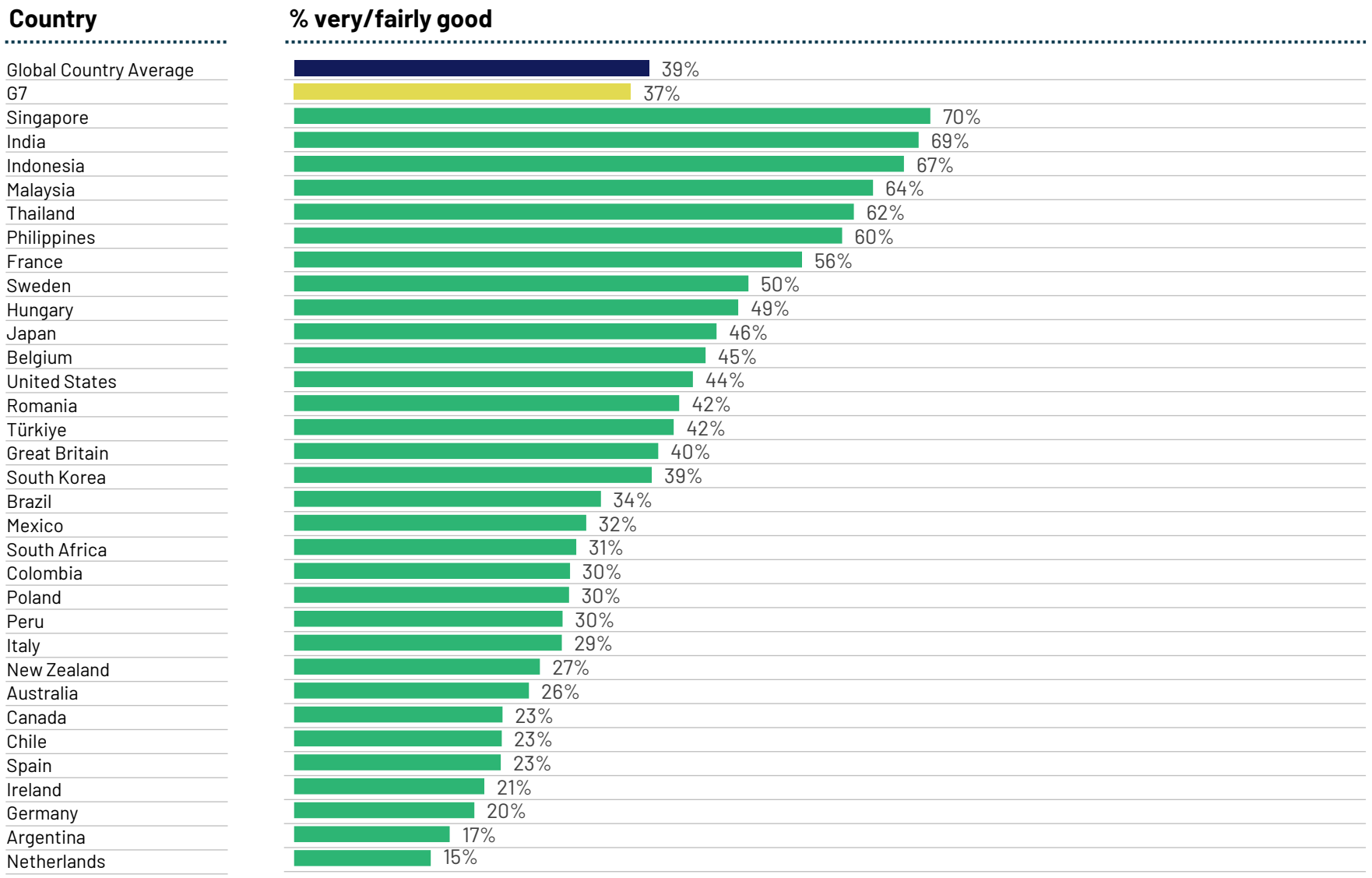


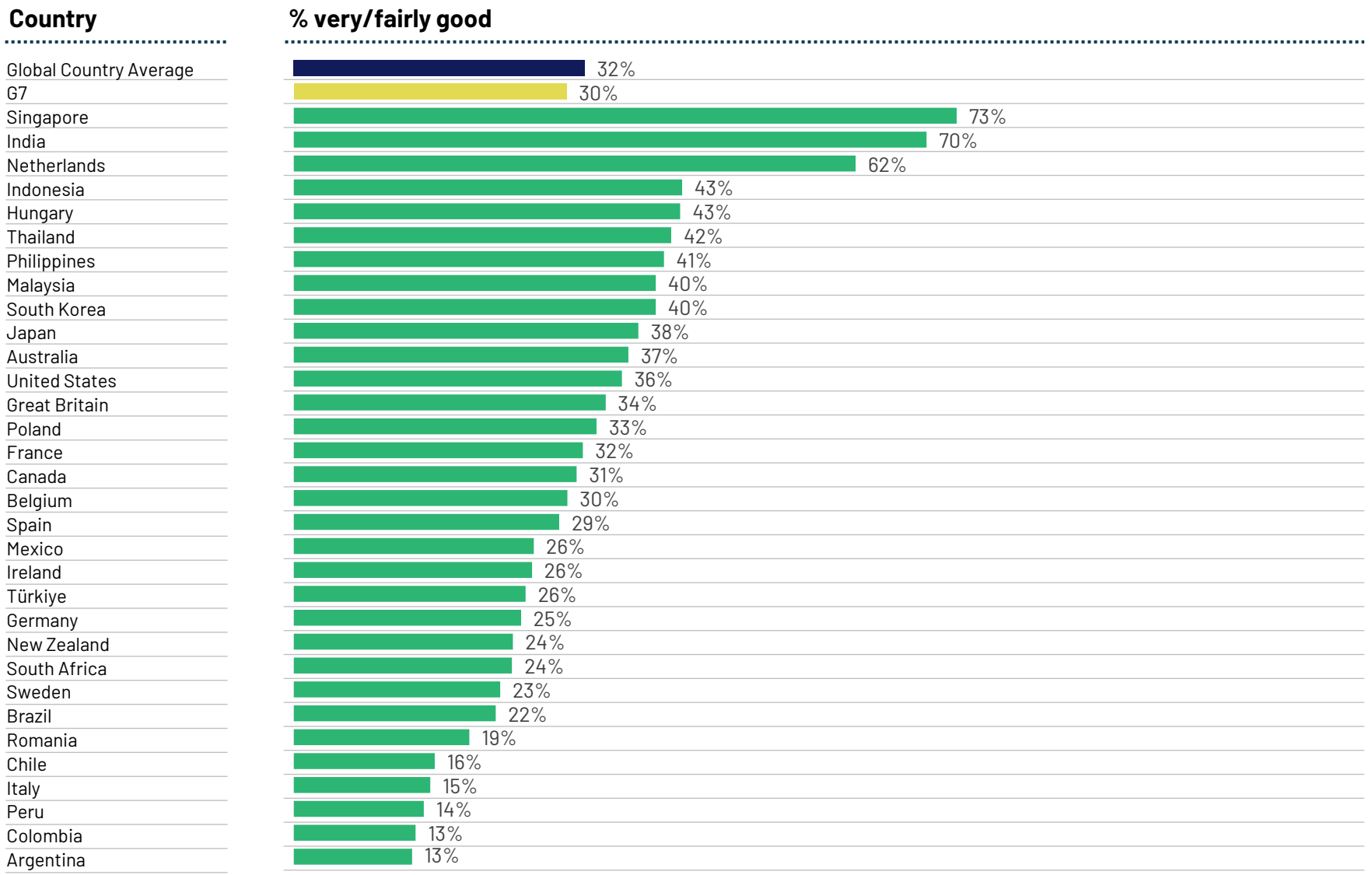
Ratings – Flood defences

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



Source: Ipsos/GIIA

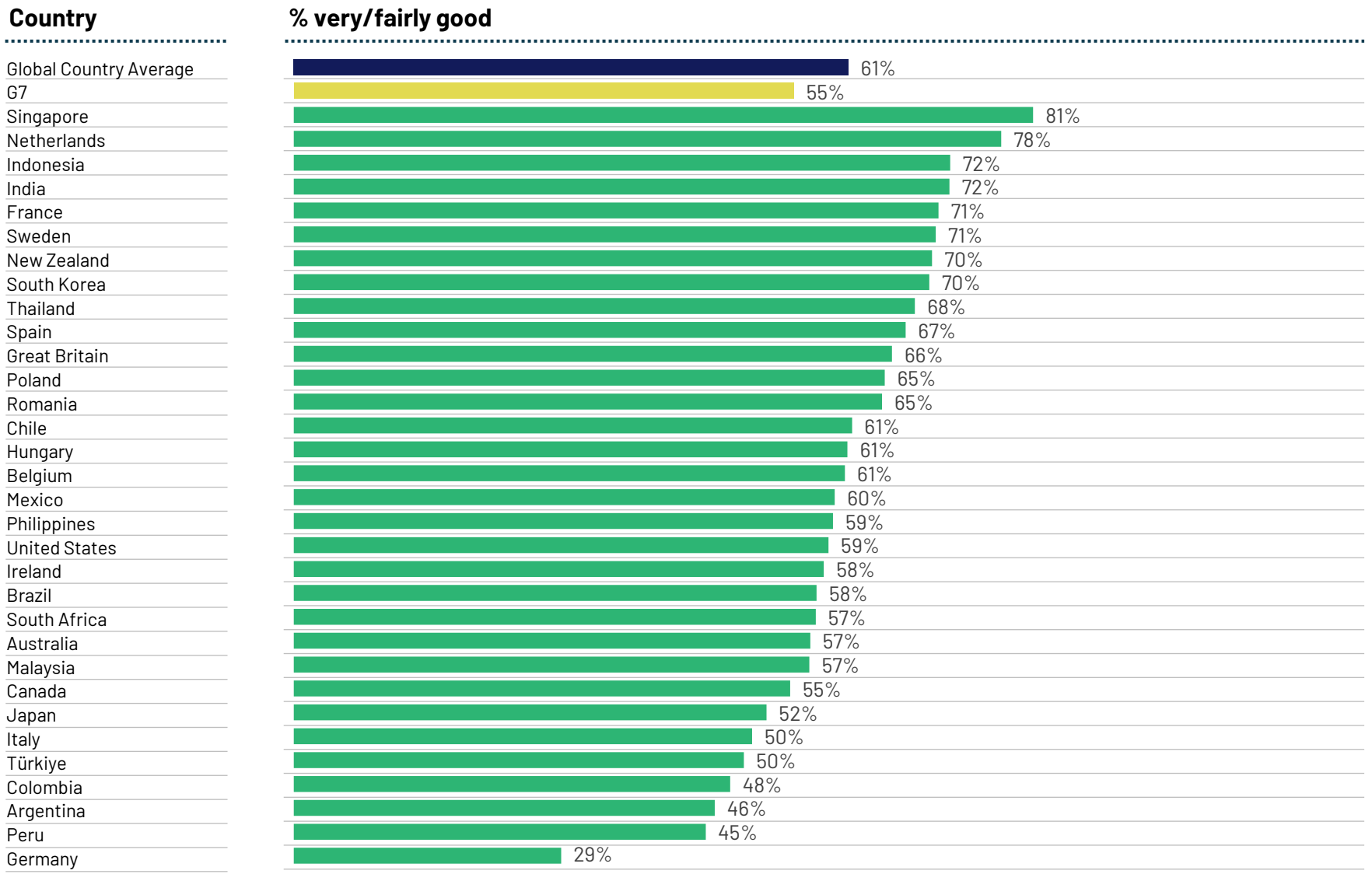
Ratings – Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G

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



Source: Ipsos/GIIA

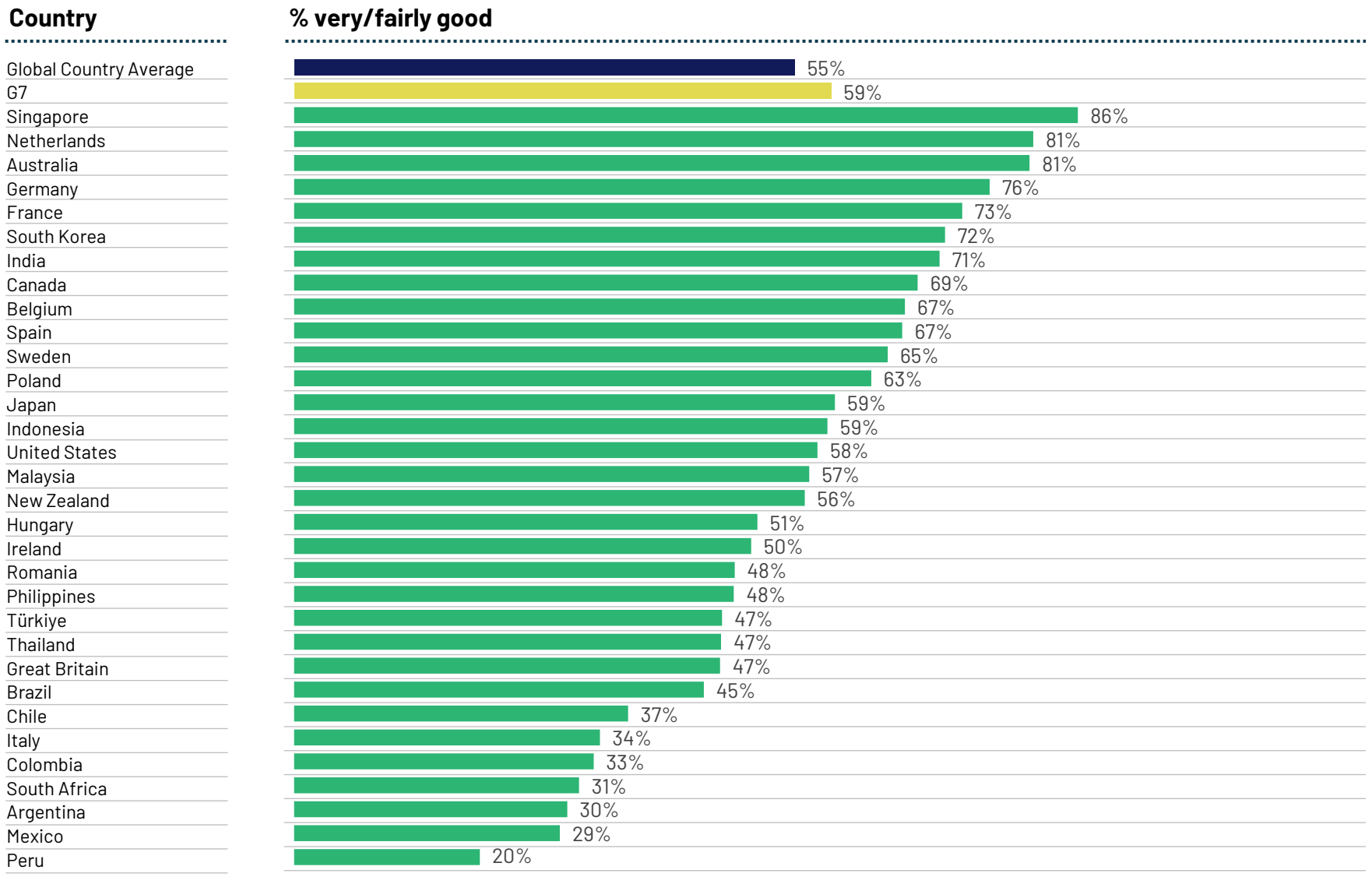
Ratings – Water supply/sewerage

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



Source: Ipsos/GIIA

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

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Renewable energy infrastructure e.g. solar and wind energy

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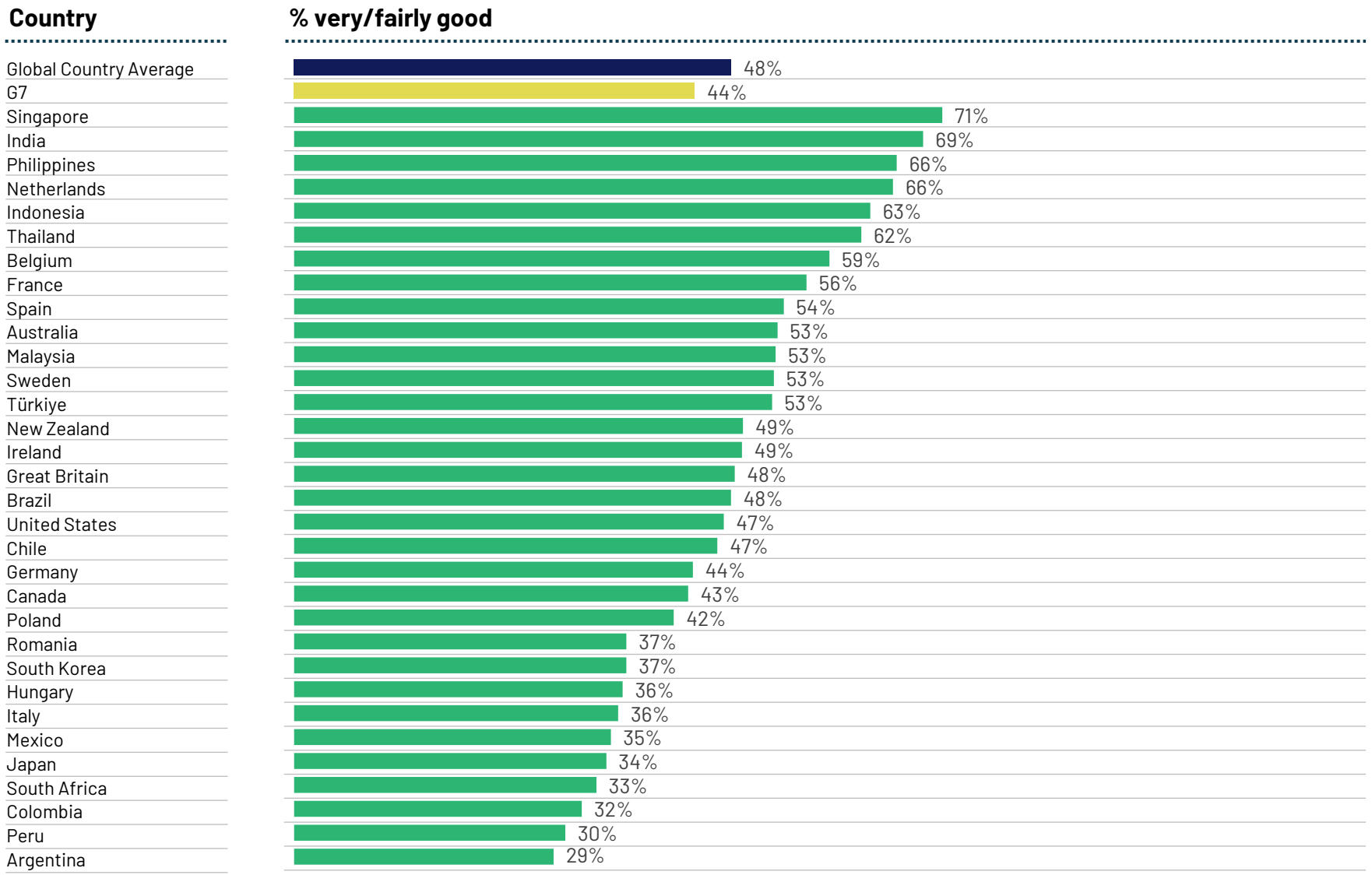

Source: Ipsos/GIIA

Ratings – Electric vehicle charging infrastructure

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Electric vehicle charging infrastructure

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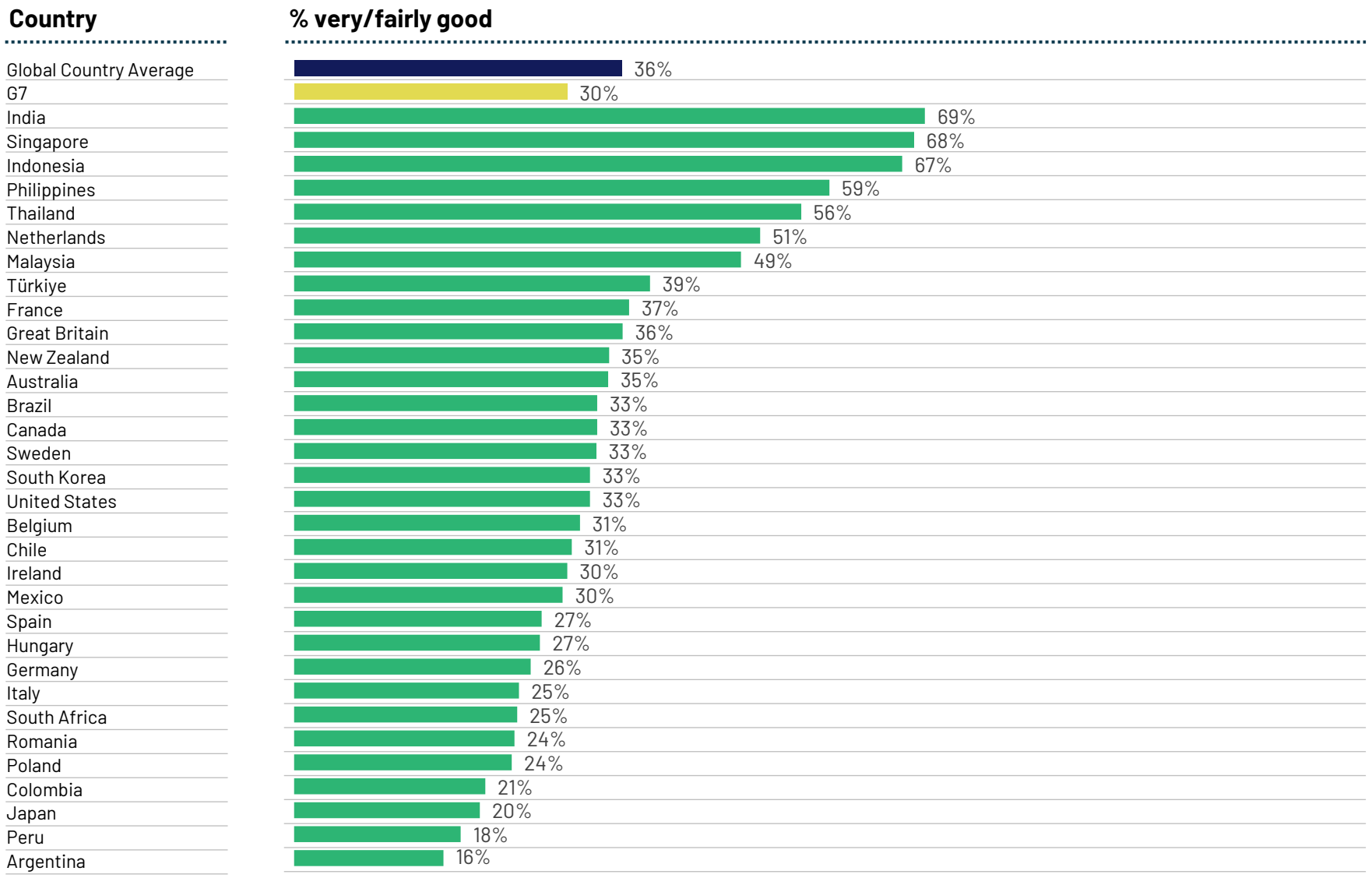
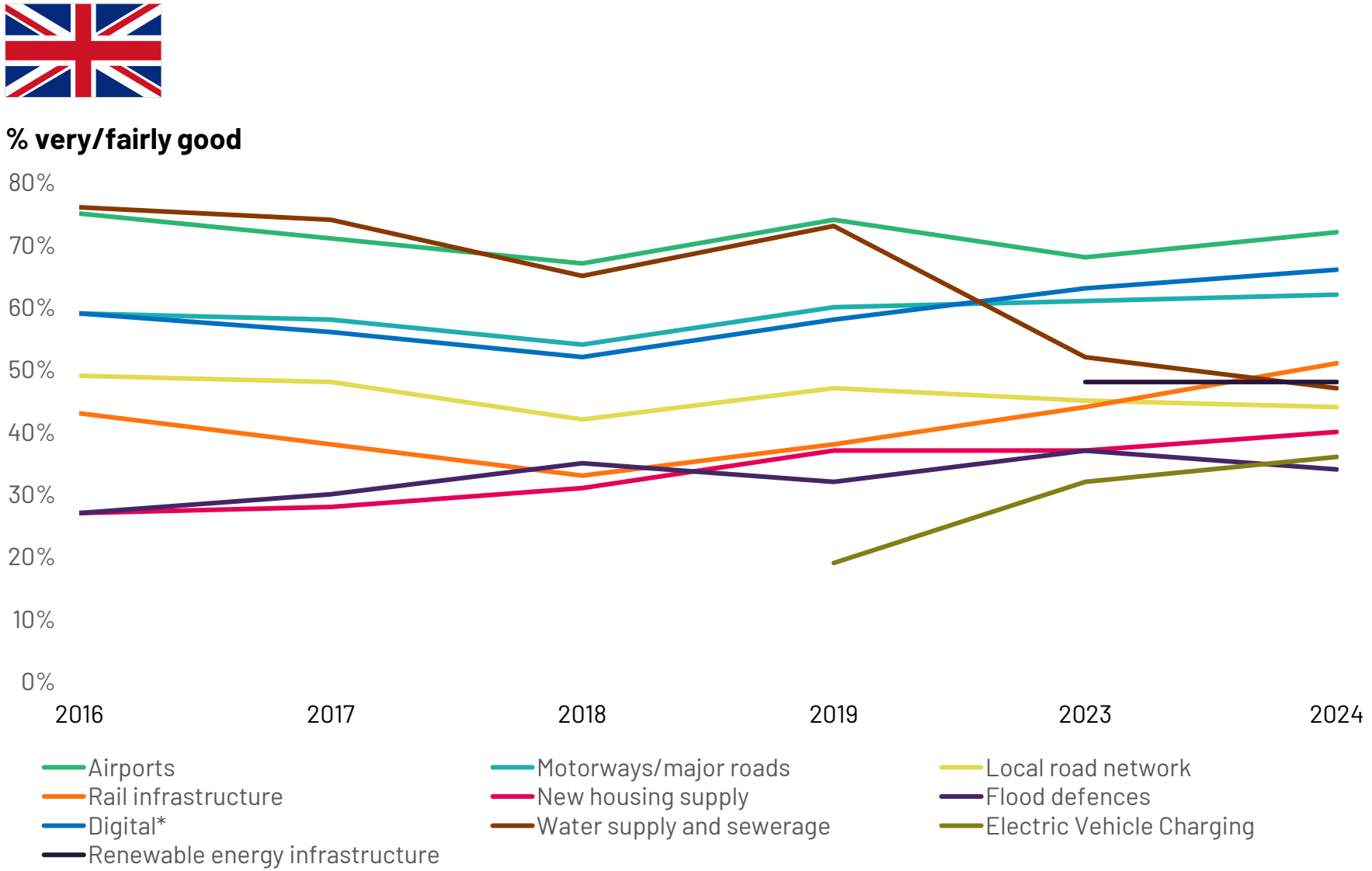


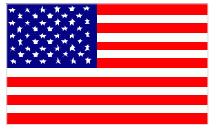
Ratings have improved for EV charging in Britain, but got worse for water

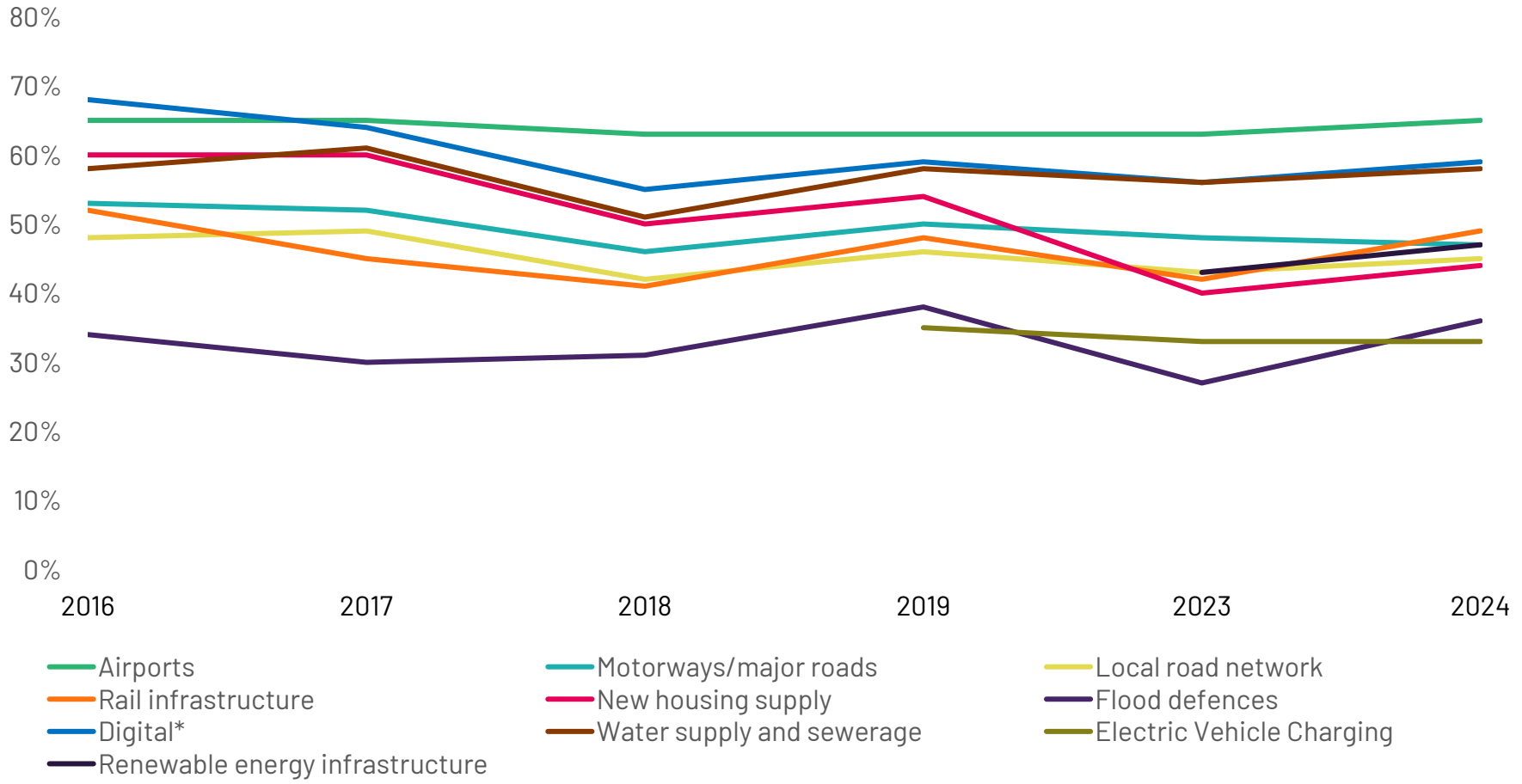


Base: 23,530 adults (online), 32 countries
May-June 2024 – 1,001 in GB

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

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





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ATTITUDES

CANADA
NORTH AMERICA
UNITED STATES
MEXICO
GULF OF MEXICO
CUBA
BAHAMAS
NORTH ATLANTIC OCEAN
BELIZE
GUATEMALA
HONDURAS
EL SALVADOR
NICARAGUA
COSTA RICA
PANAMA
CARIBBEAN SEA
JAMAICA
HAITI
DOMINICAN REPUBLIC
PUERTO RICO (U.S.)
DOMINICA
BARBADOS
TRINIDAD & TOBAGO
GRENADA
VENEZUELA
COLOMBIA
GUYANA
SURINAME
FRENCH GUIANA
ECUADOR
PERU
SOUTH AMERICA
BRAZIL
BOLIVIA
PARAGUAY
CHILE
Galapagos Islands (ECUADOR)
Easter Islands (CHILE)
PACIFIC OCEAN

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...?

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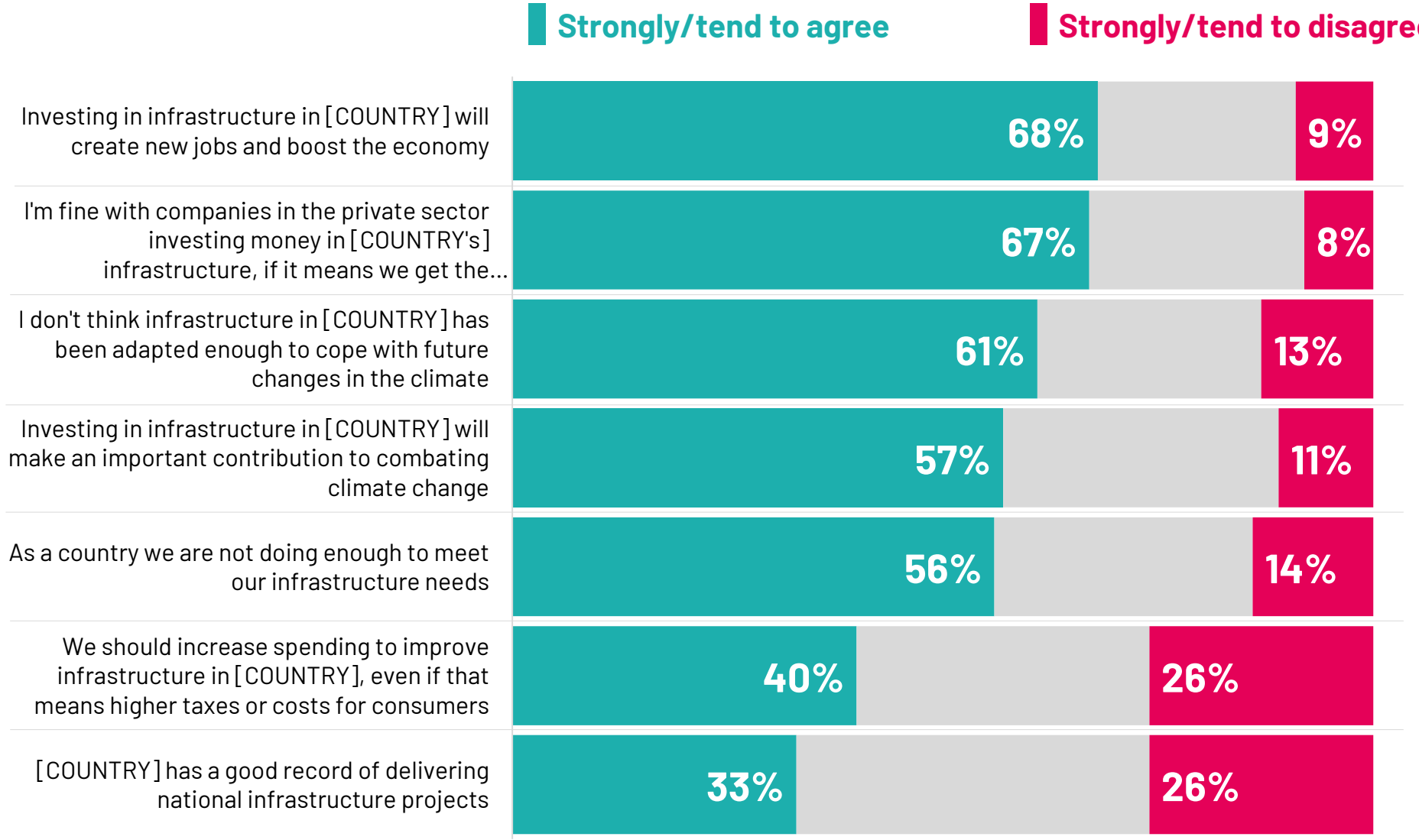

Source: Ipsos/GIIA

Attitudes towards infrastructure – Britain

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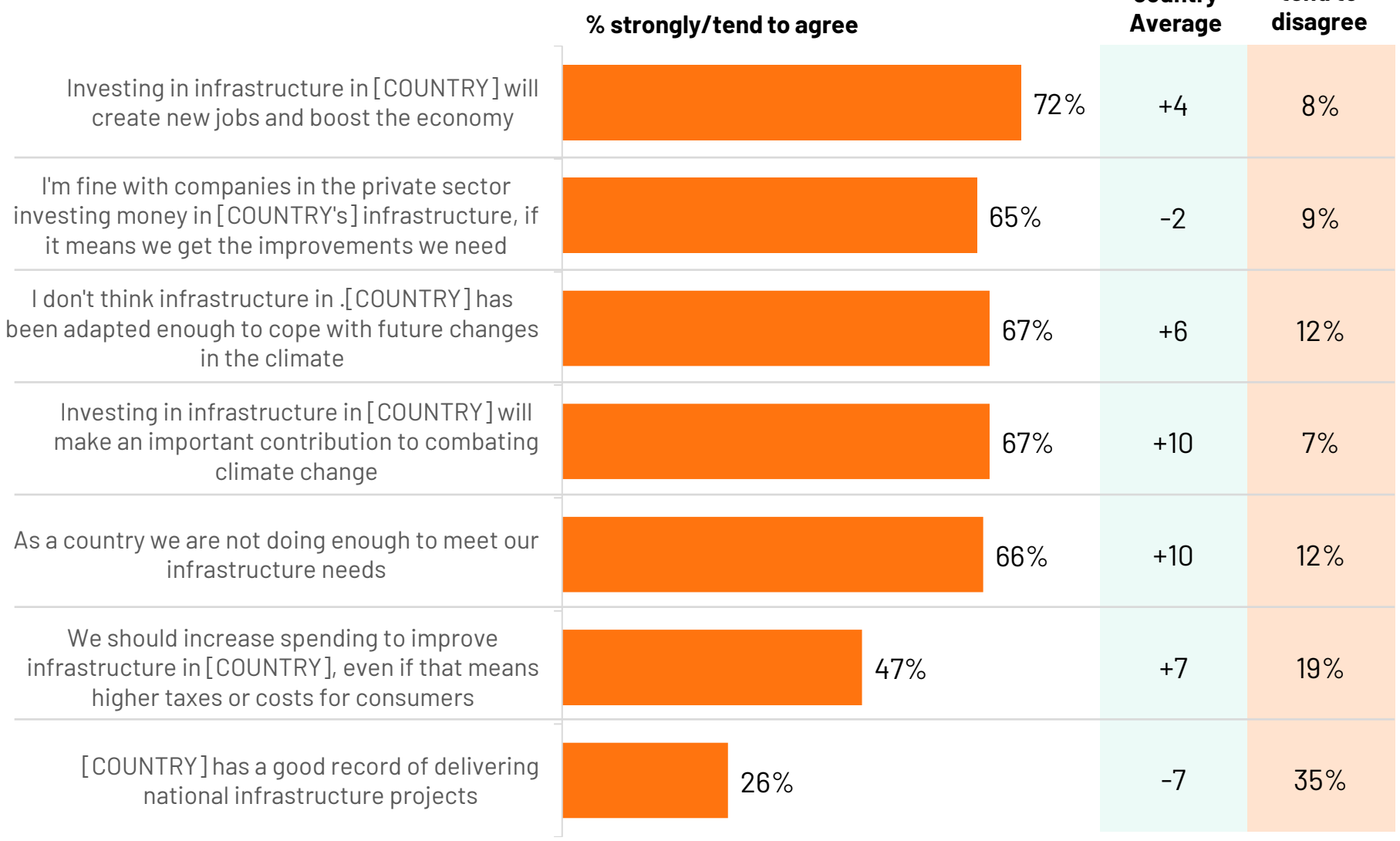

Attitudes towards infrastructure – U.S.

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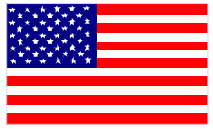

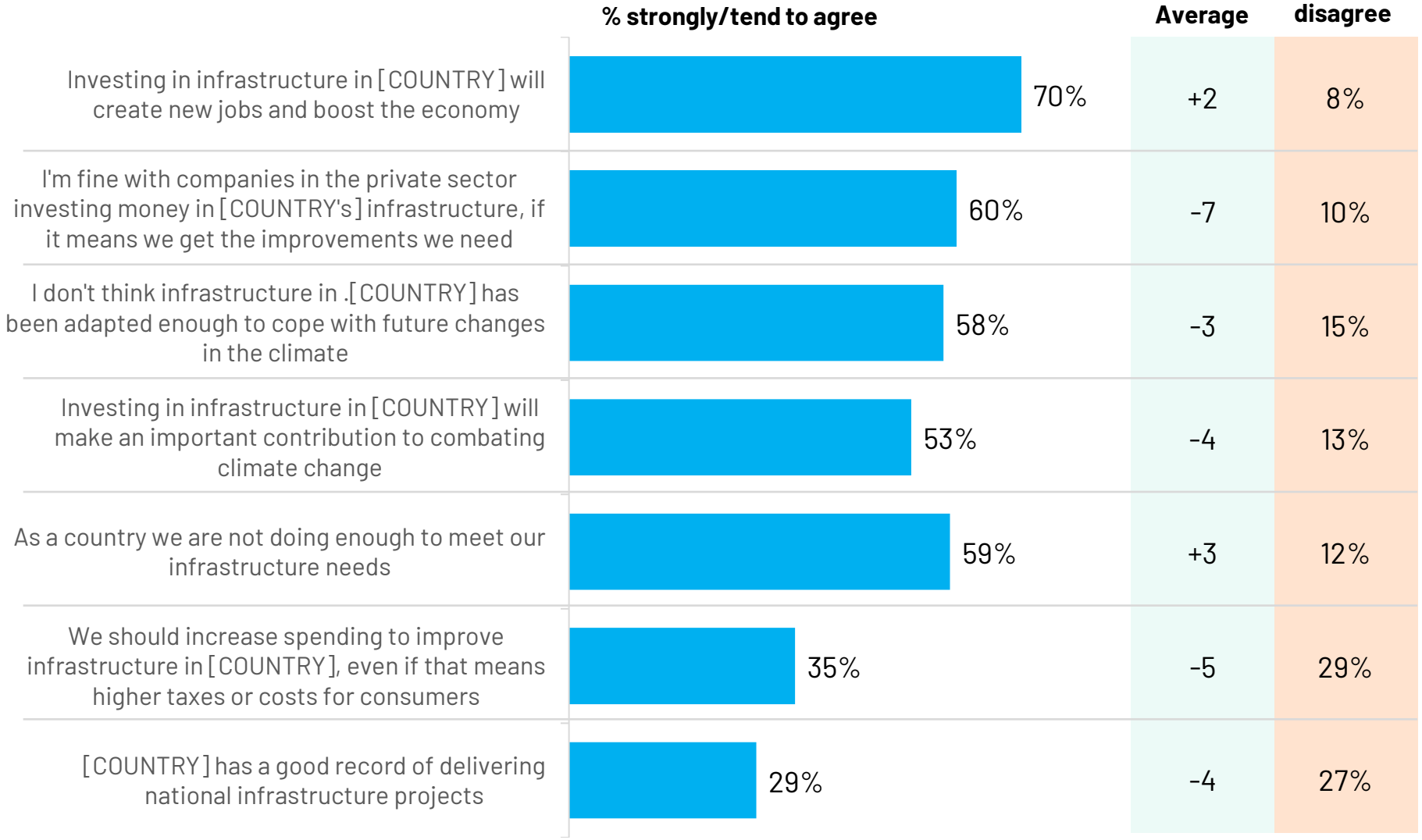

Source: Ipsos/GIIA

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"

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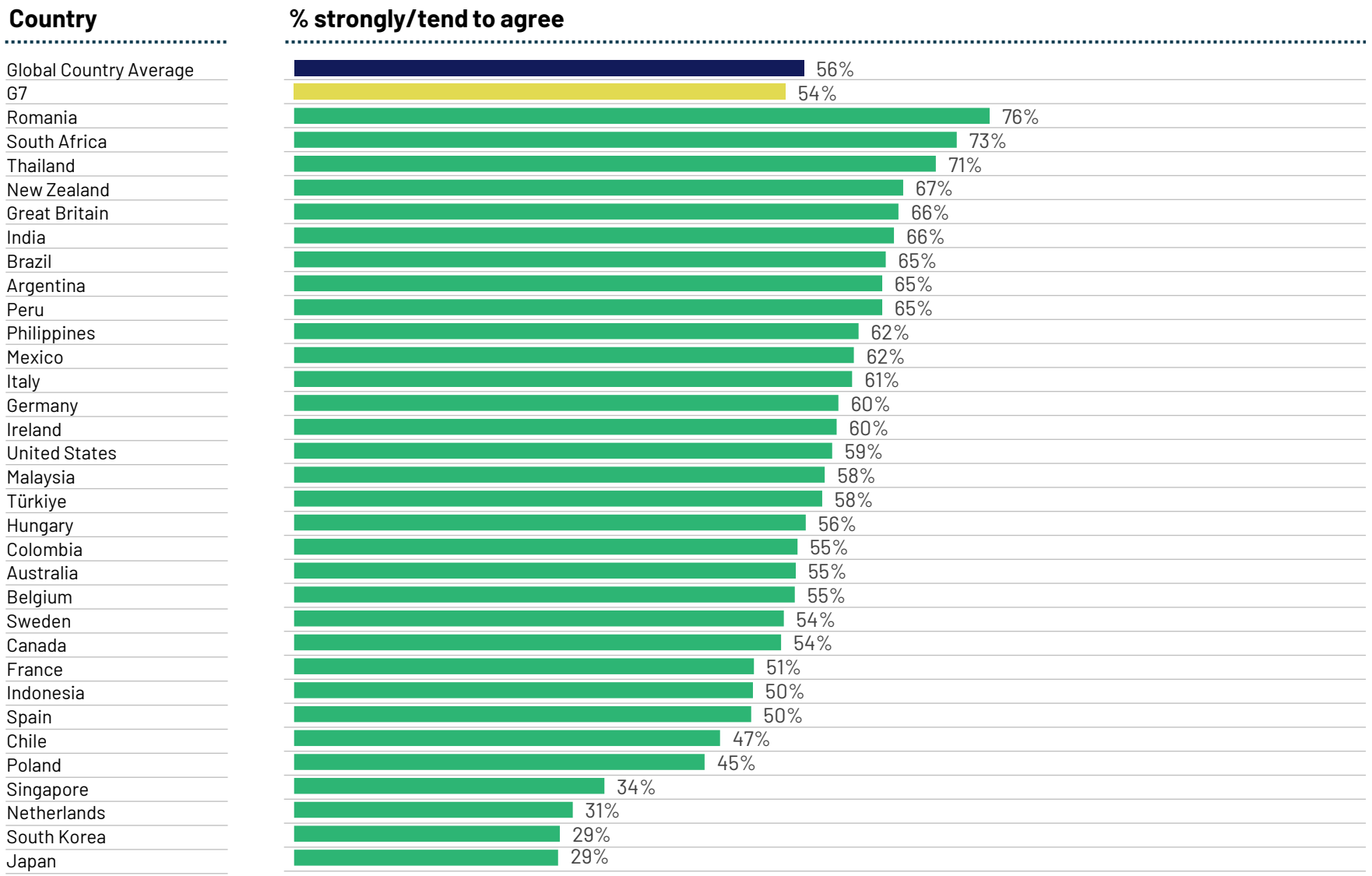

Source: Ipsos/GIIA

‘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”

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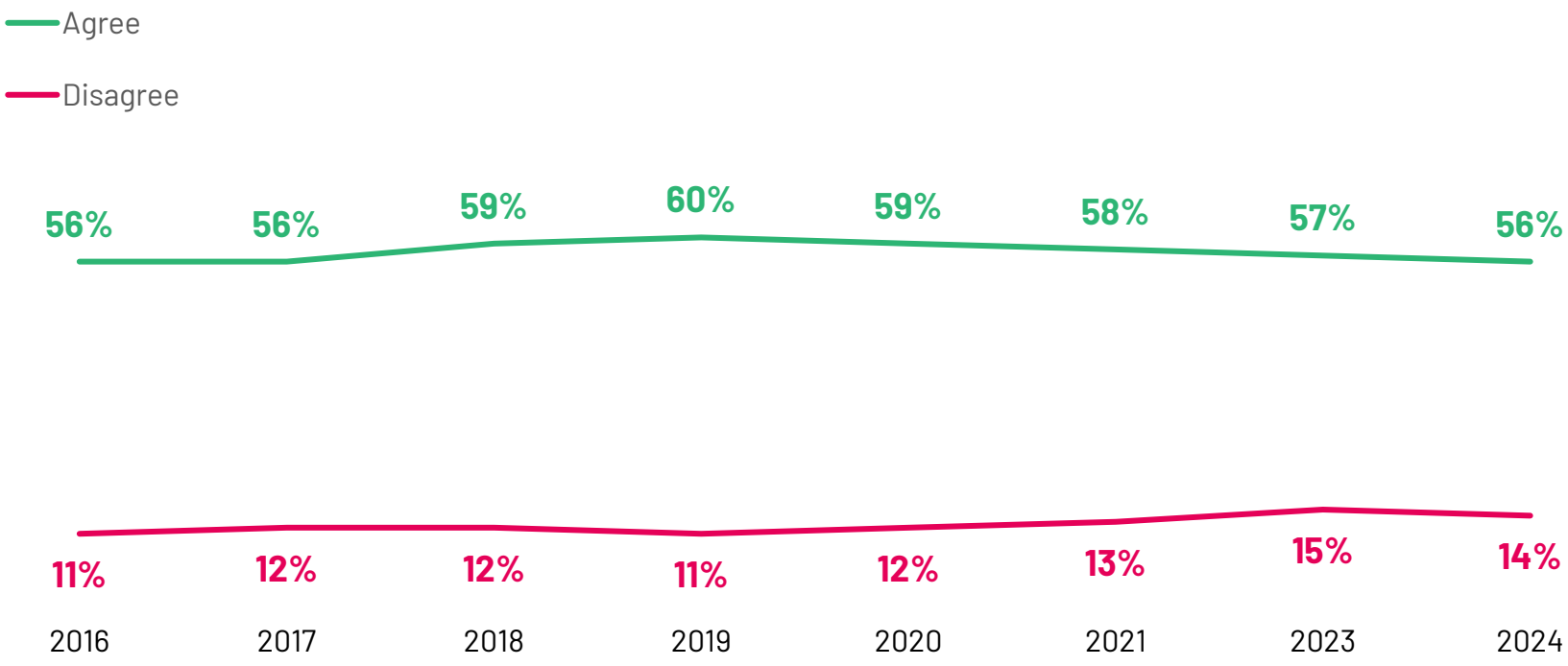
Global Country Average

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



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"

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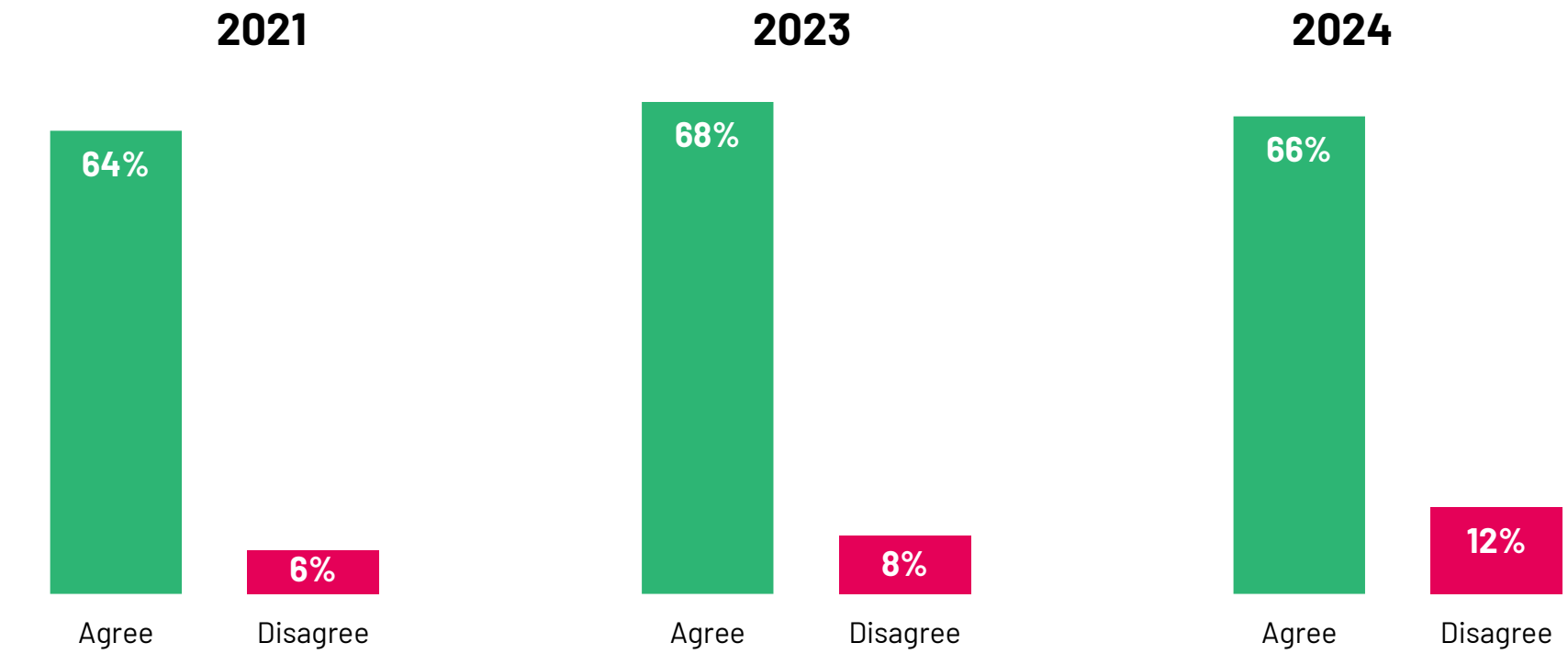

In the U.S., the movement between 2021-23 has been reversed

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...?

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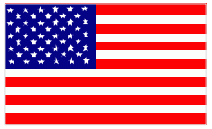

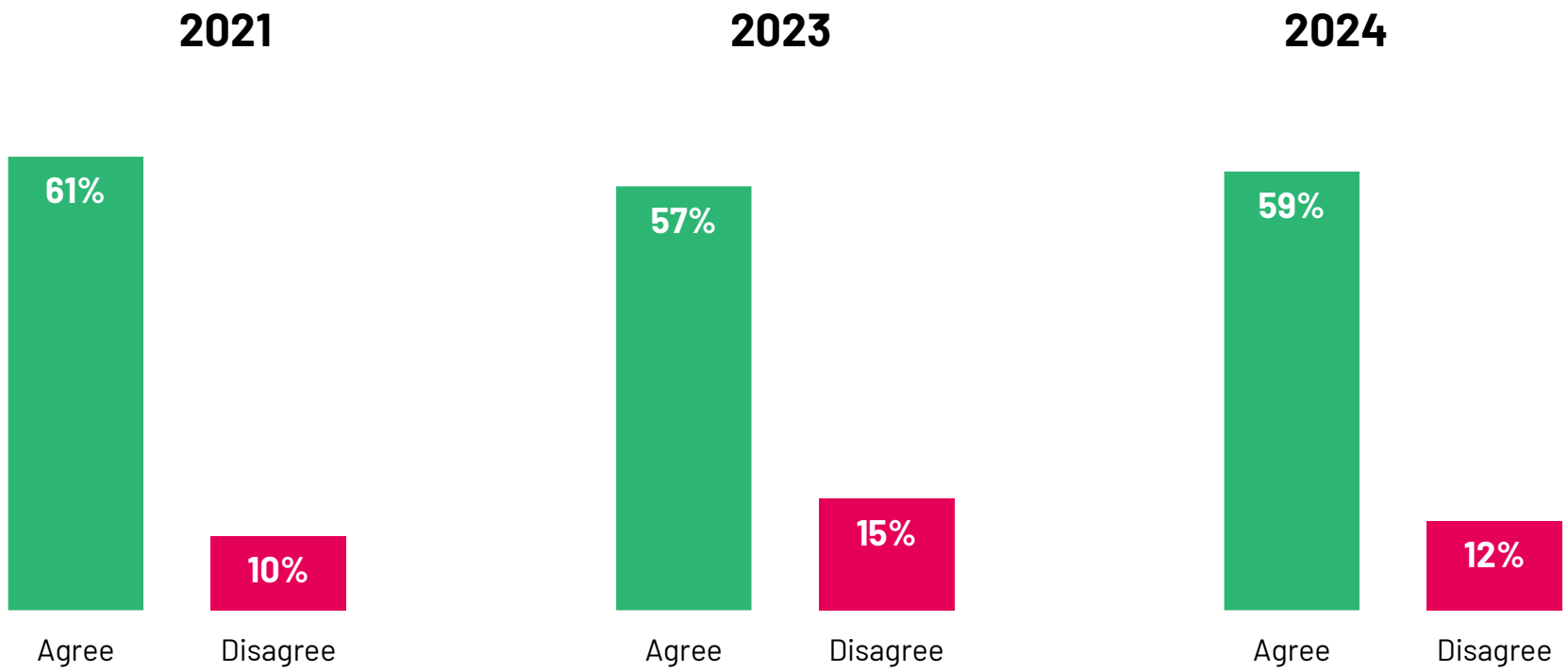

Source: Ipsos/GIIA

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"

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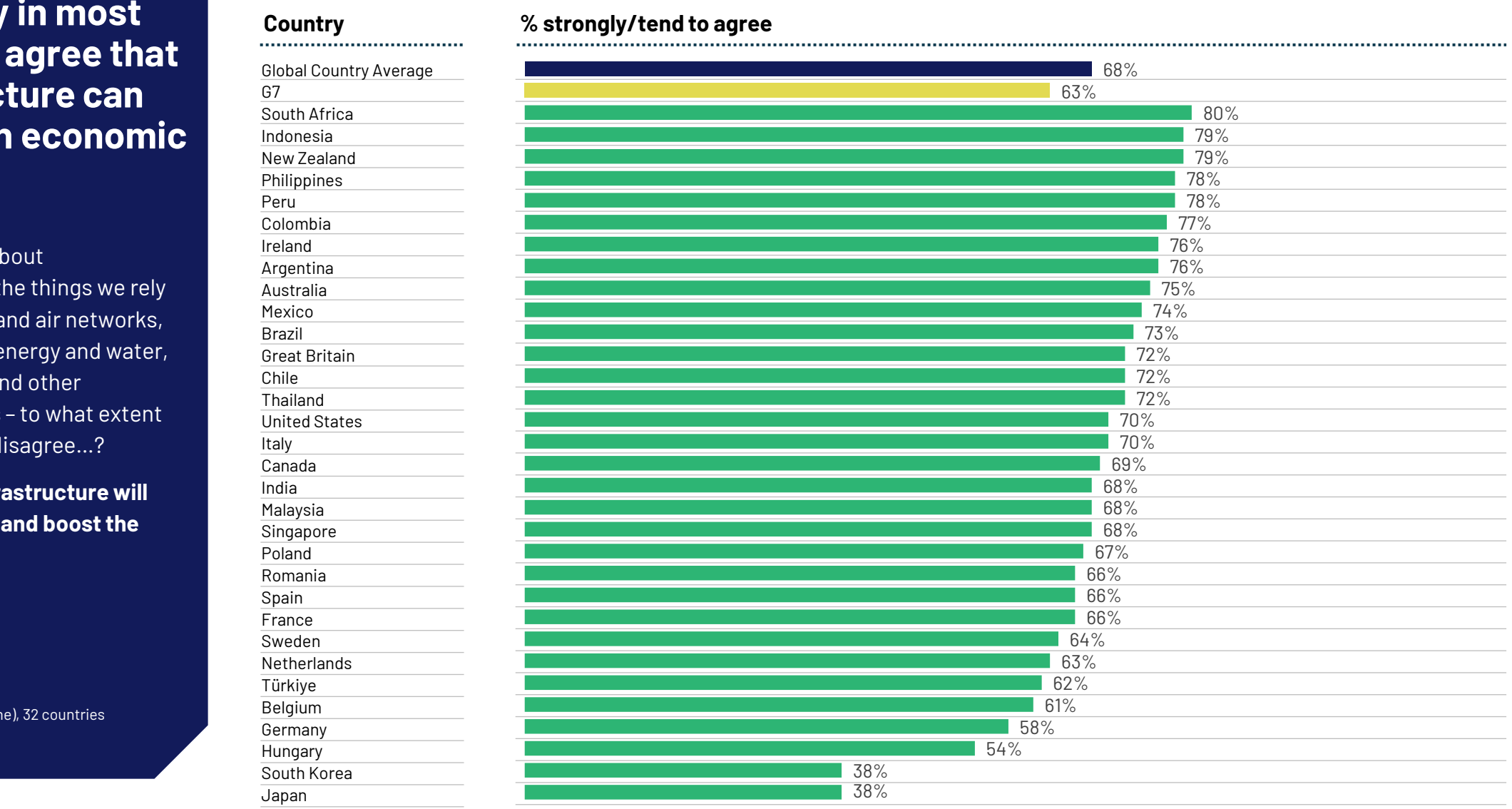

Source: Ipsos/GIIA

...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"**

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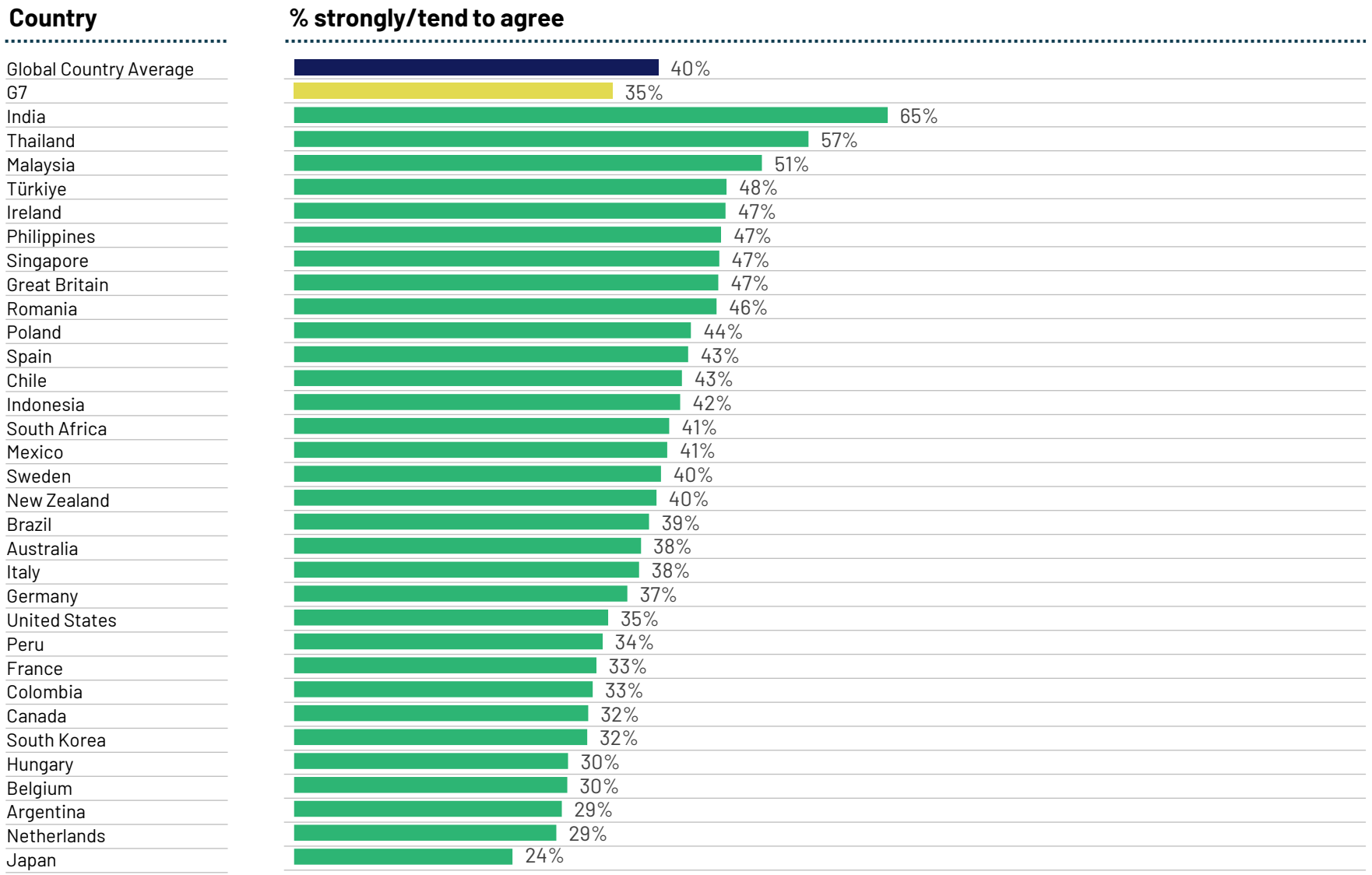
May-June 2024



Source: Ipsos/GIIA

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"**

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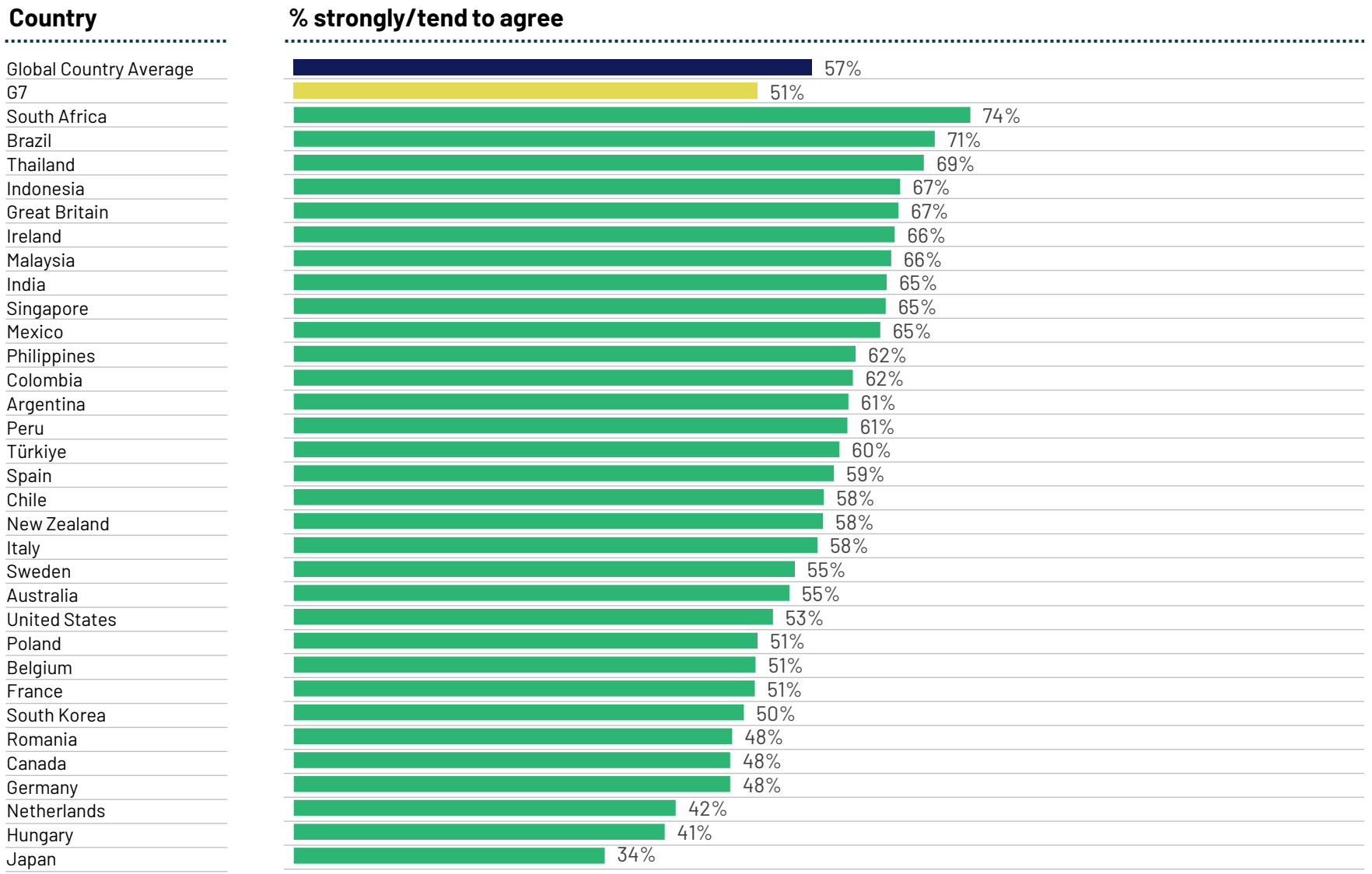

Source: Ipsos/GIIA

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"

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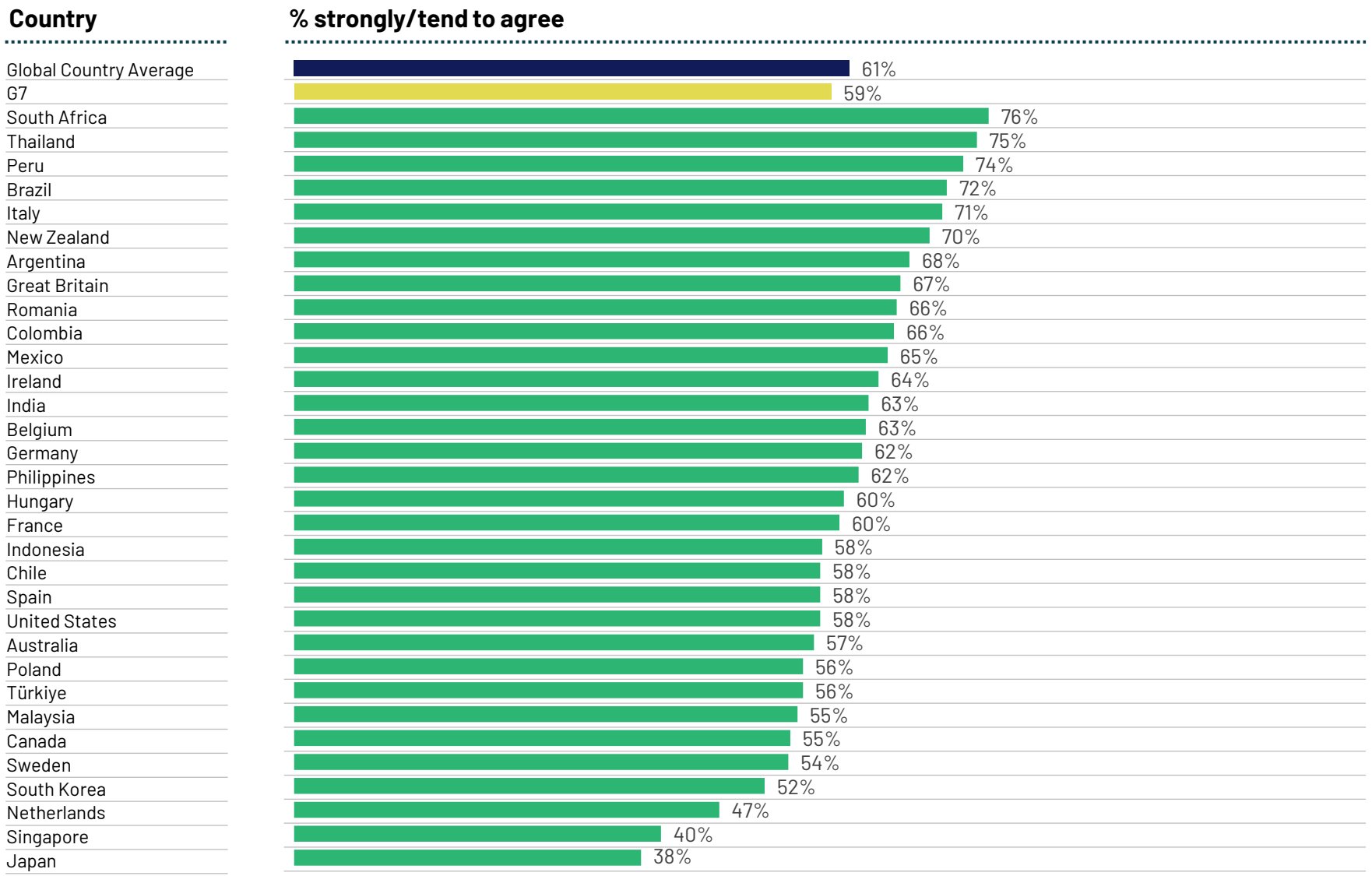

Source: Ipsos/GIIA

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"**

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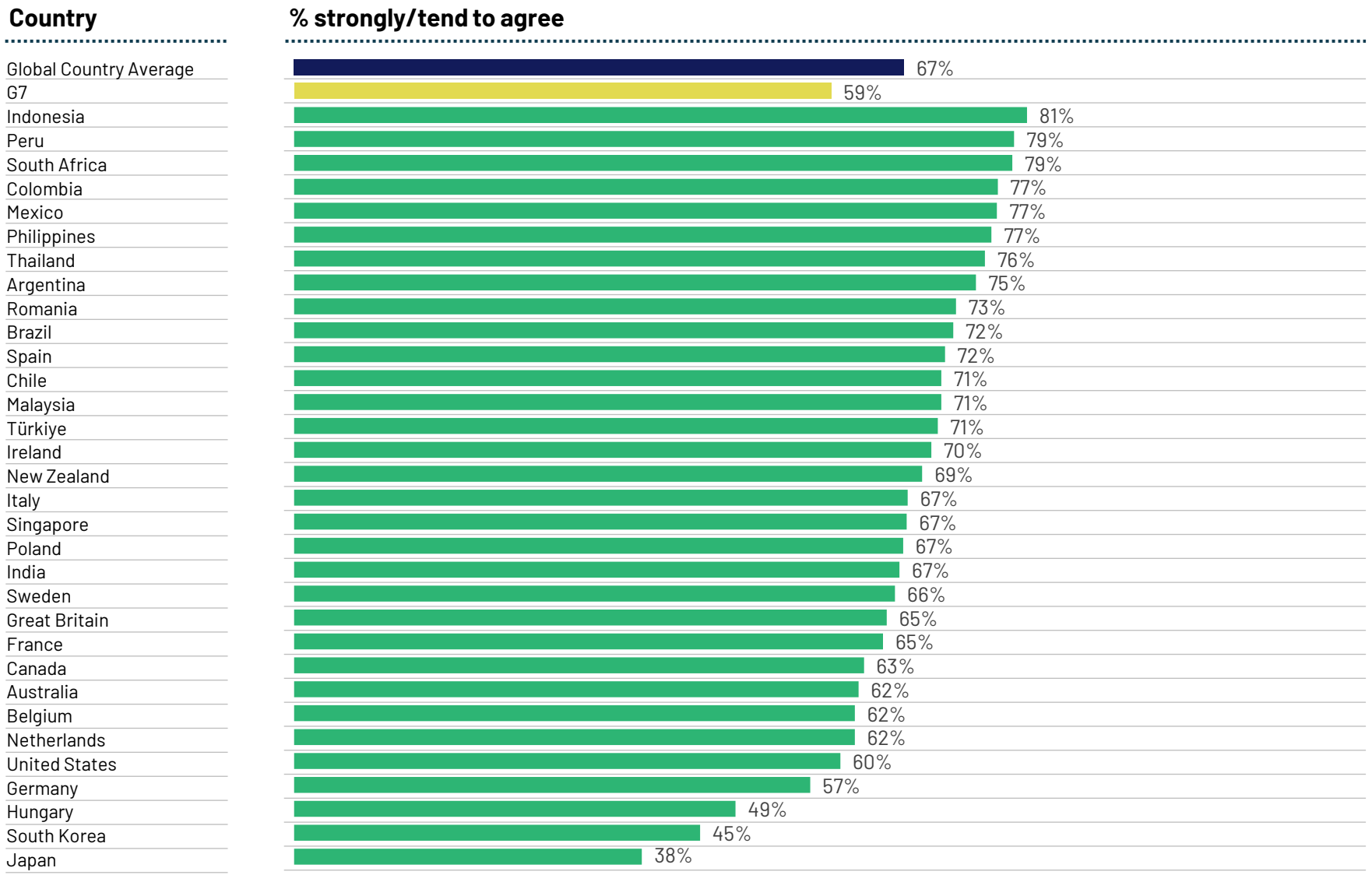
May-June 2024



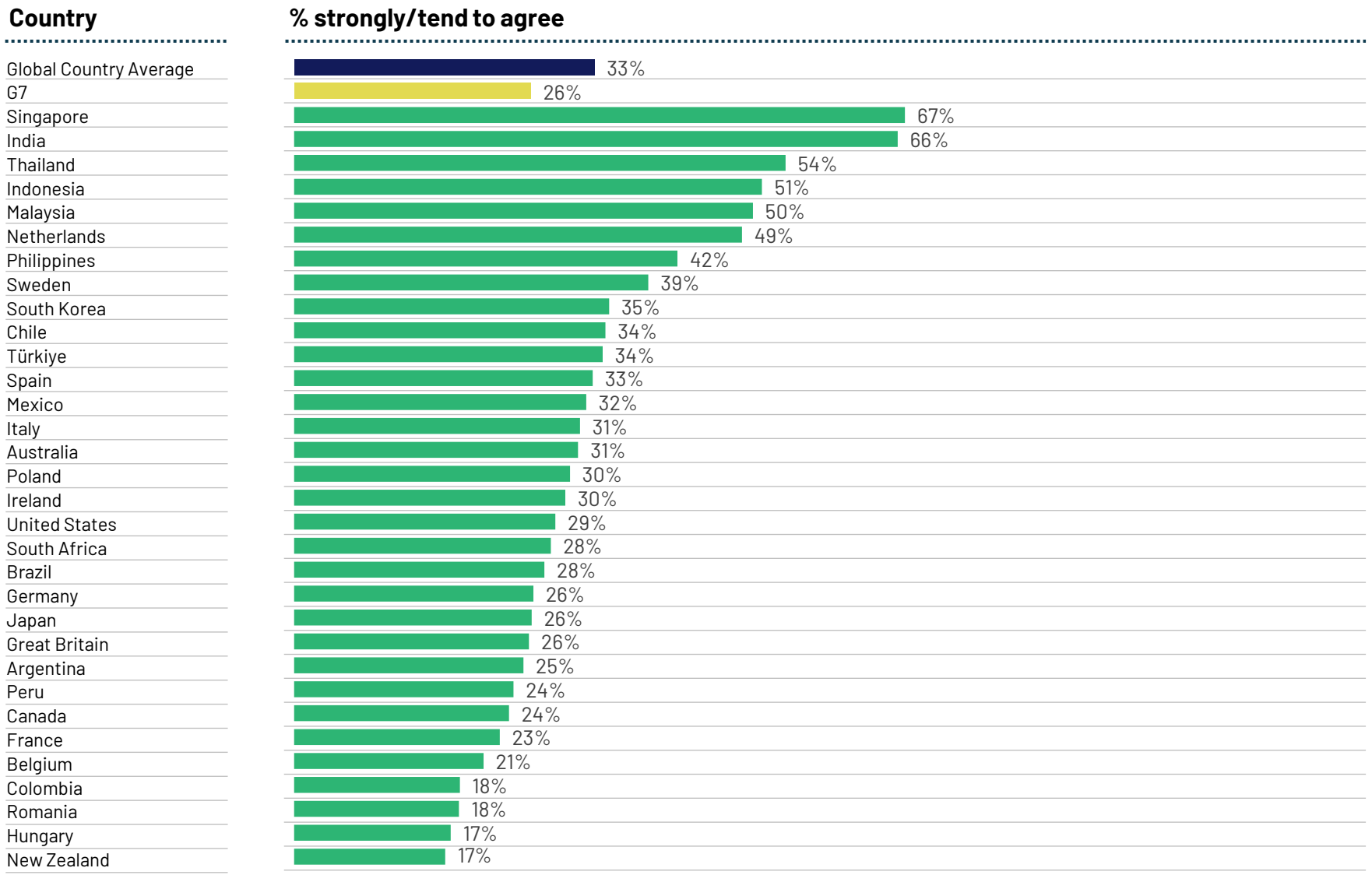
Source: Ipsos/GIIA

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



PRIORITIES

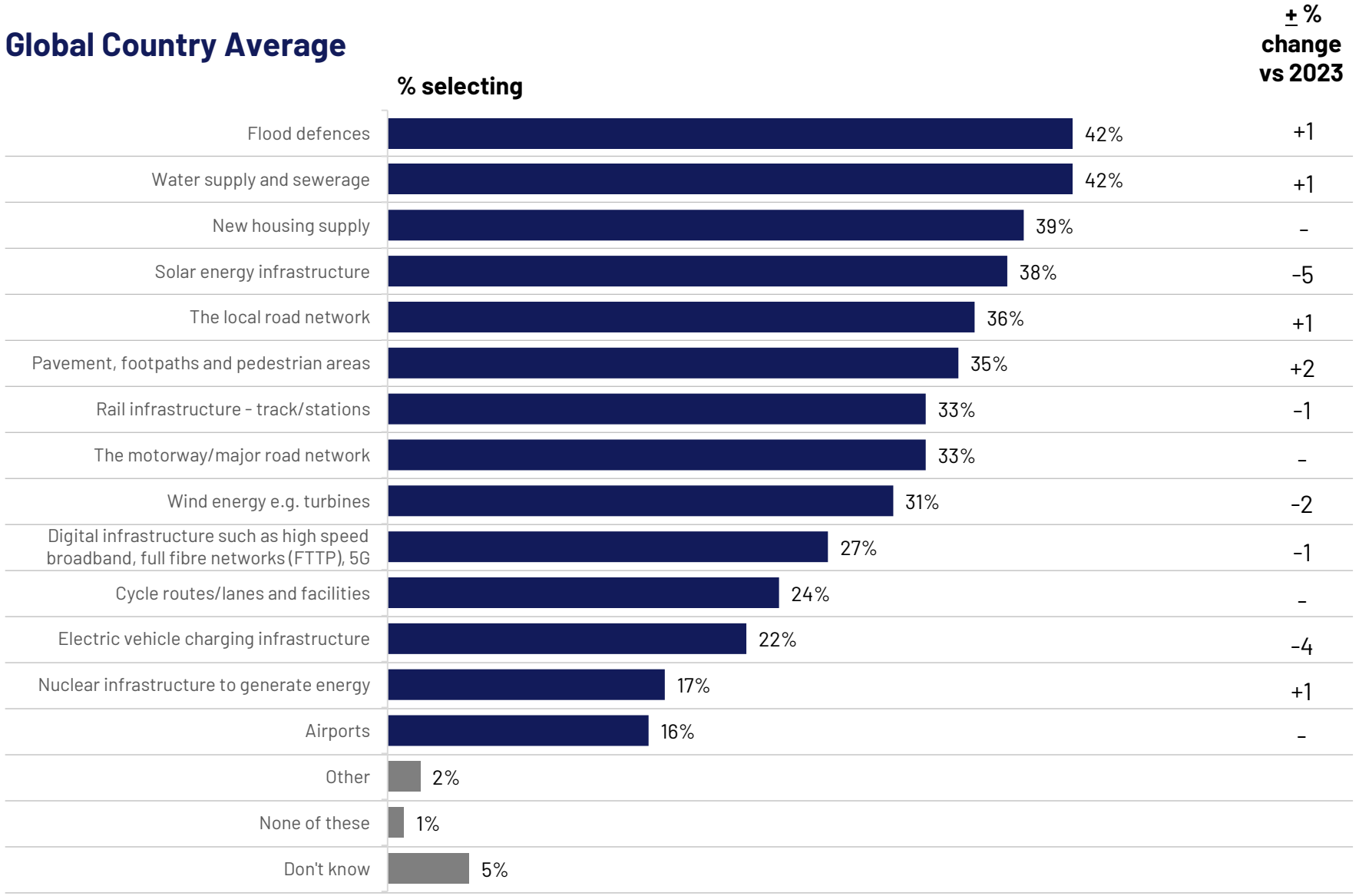
CANADA
NORTH AMERICA
UNITED STATES
MEXICO
GULF OF MEXICO
CUBA
BAHAMAS
NORTH ATLANTIC OCEAN
BELIZE
GUATEMALA
HONDURAS
EL SALVADOR
NICARAGUA
COSTA RICA
PANAMA
CARIBBEAN SEA
JAMAICA
HAITI
DOMINICAN REPUBLIC
PUERTO RICO (U.S.)
DOMINICA
BARBADOS
GRENADA
TRINIDAD & TOBAGO
VENEZUELA
COLOMBIA
GUYANA
SURINAME
FRENCH GUIANA
ECUADOR
PERU
BOLIVIA
PARAGUAY
CHILE
SOUTH AMERICA
BRAZIL
Galapagos Islands (ECUADOR)
Easter Islands (CHILE)
PACIFIC OCEAN

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

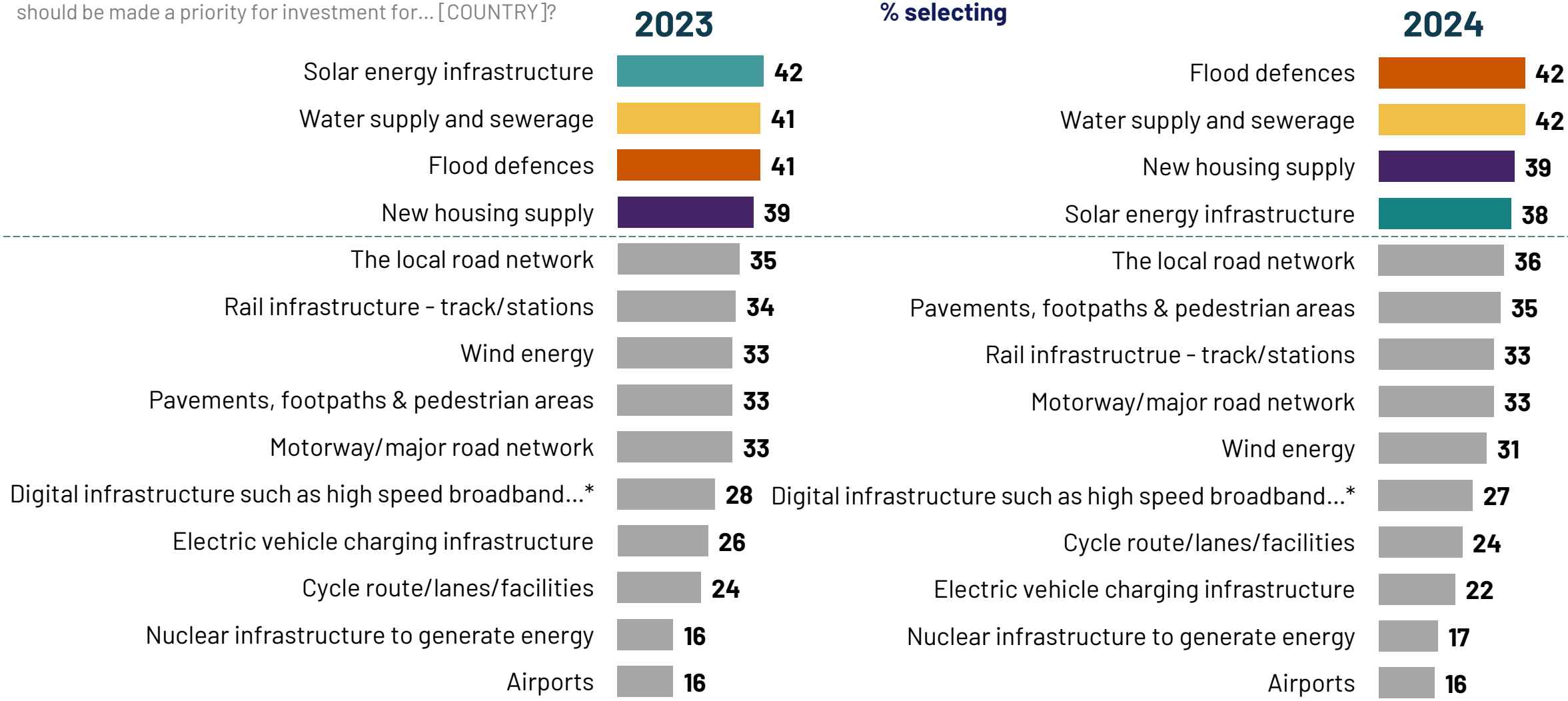
Global Country Average



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]?

Global Country Average
% selecting



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

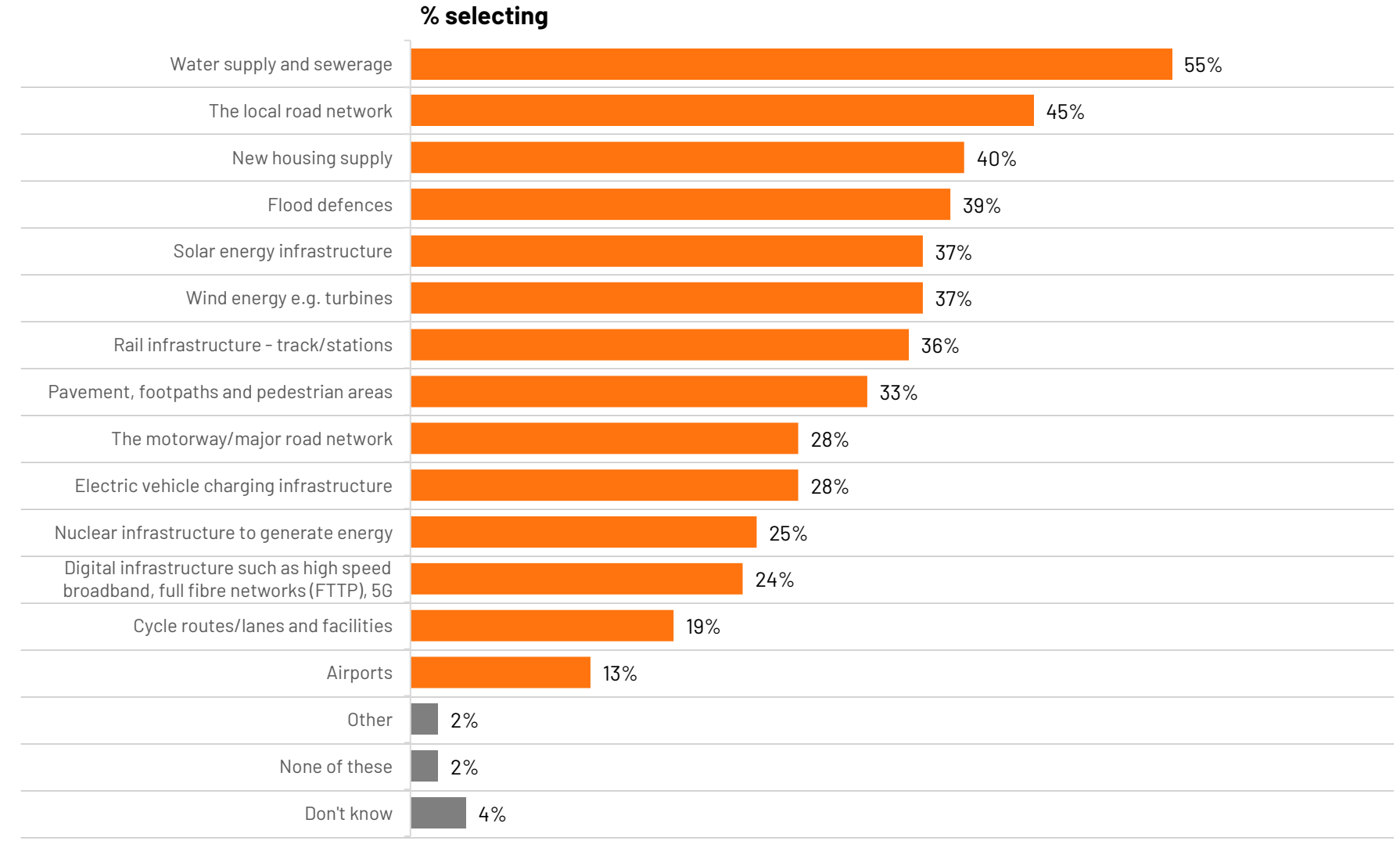
Base: 22,816 adults (online), 31 countries, May-June 2023

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

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

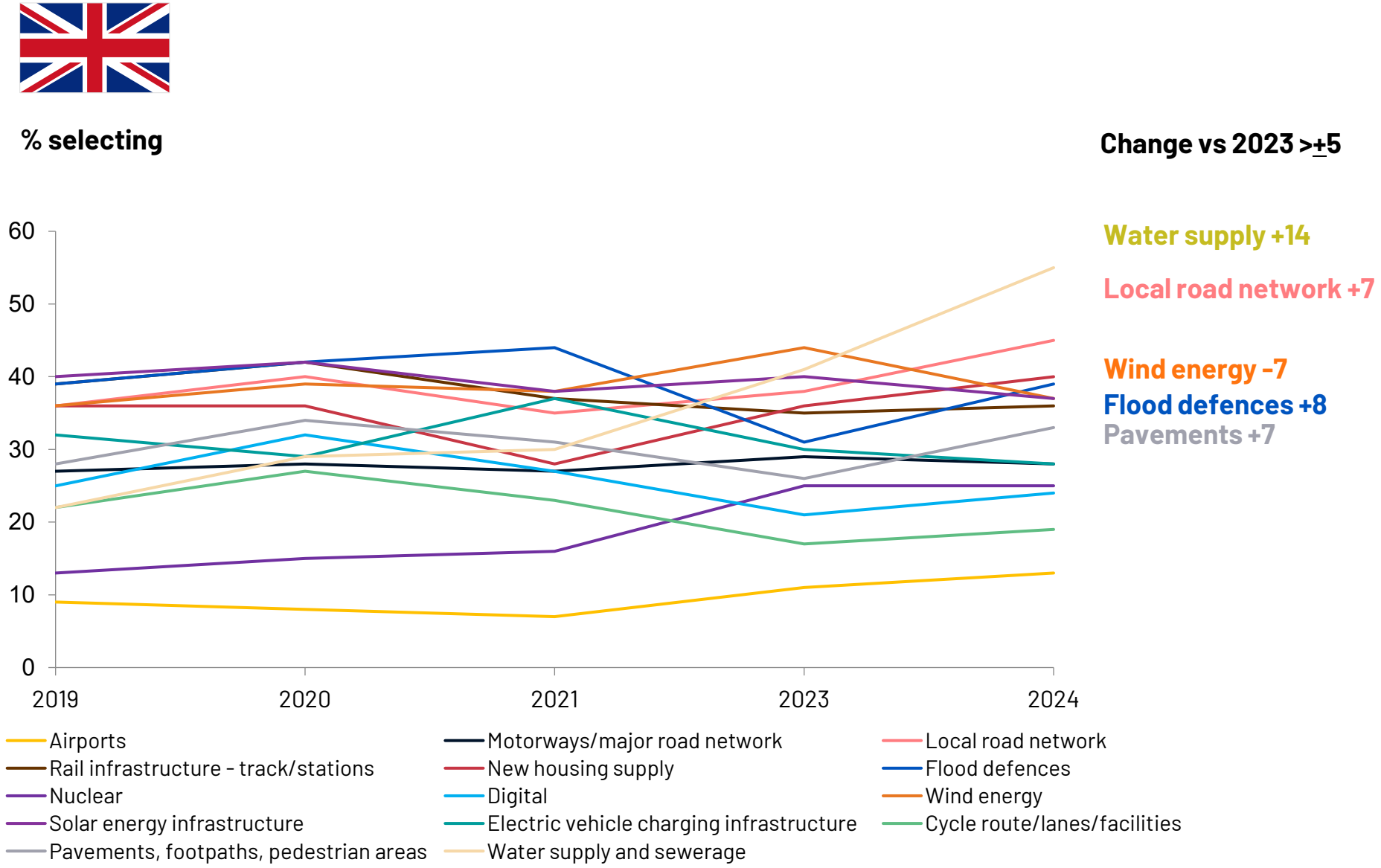


Source: Ipsos/GIIA

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

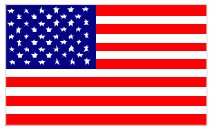


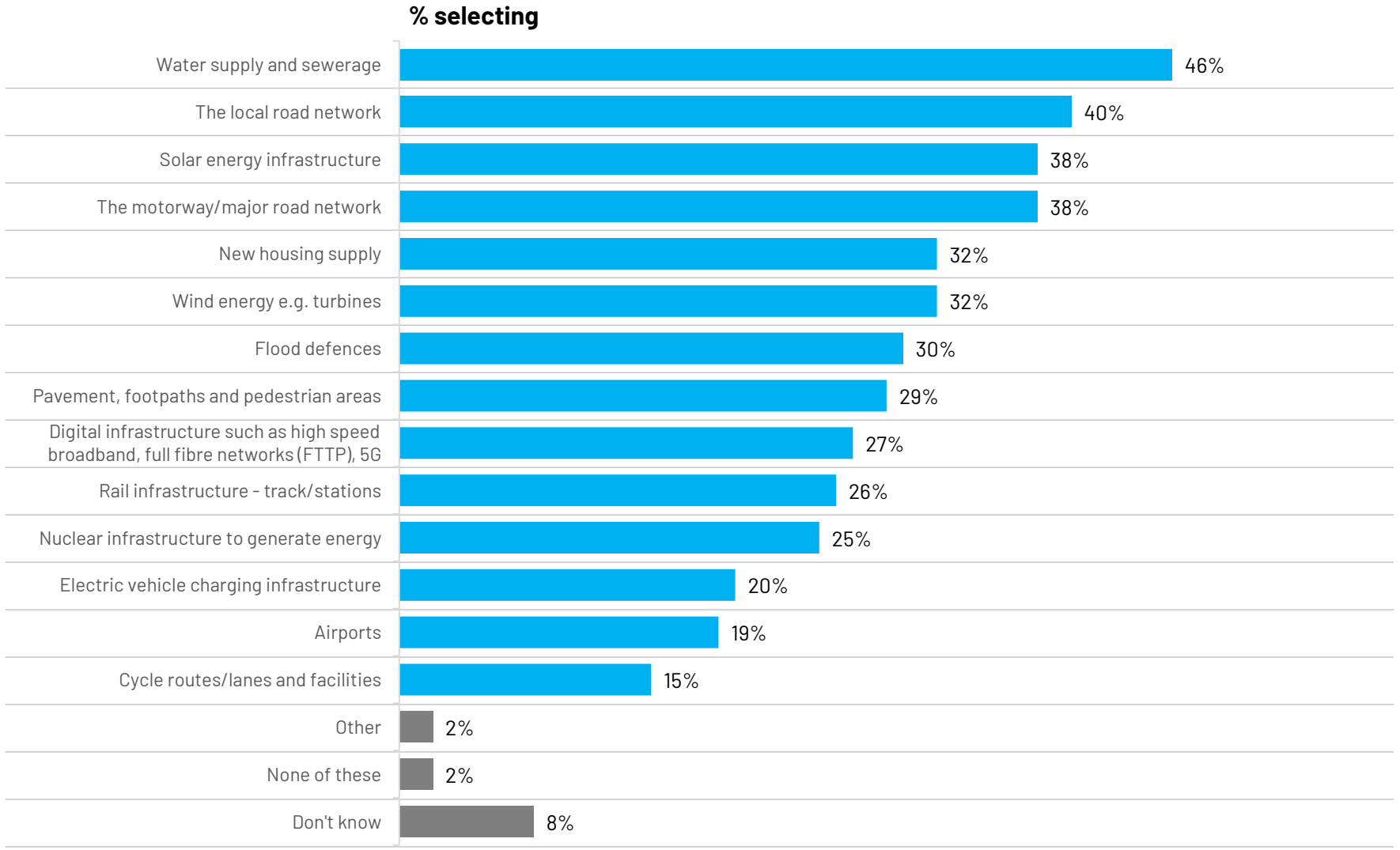
Source: Ipsos/GIIA

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



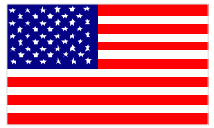


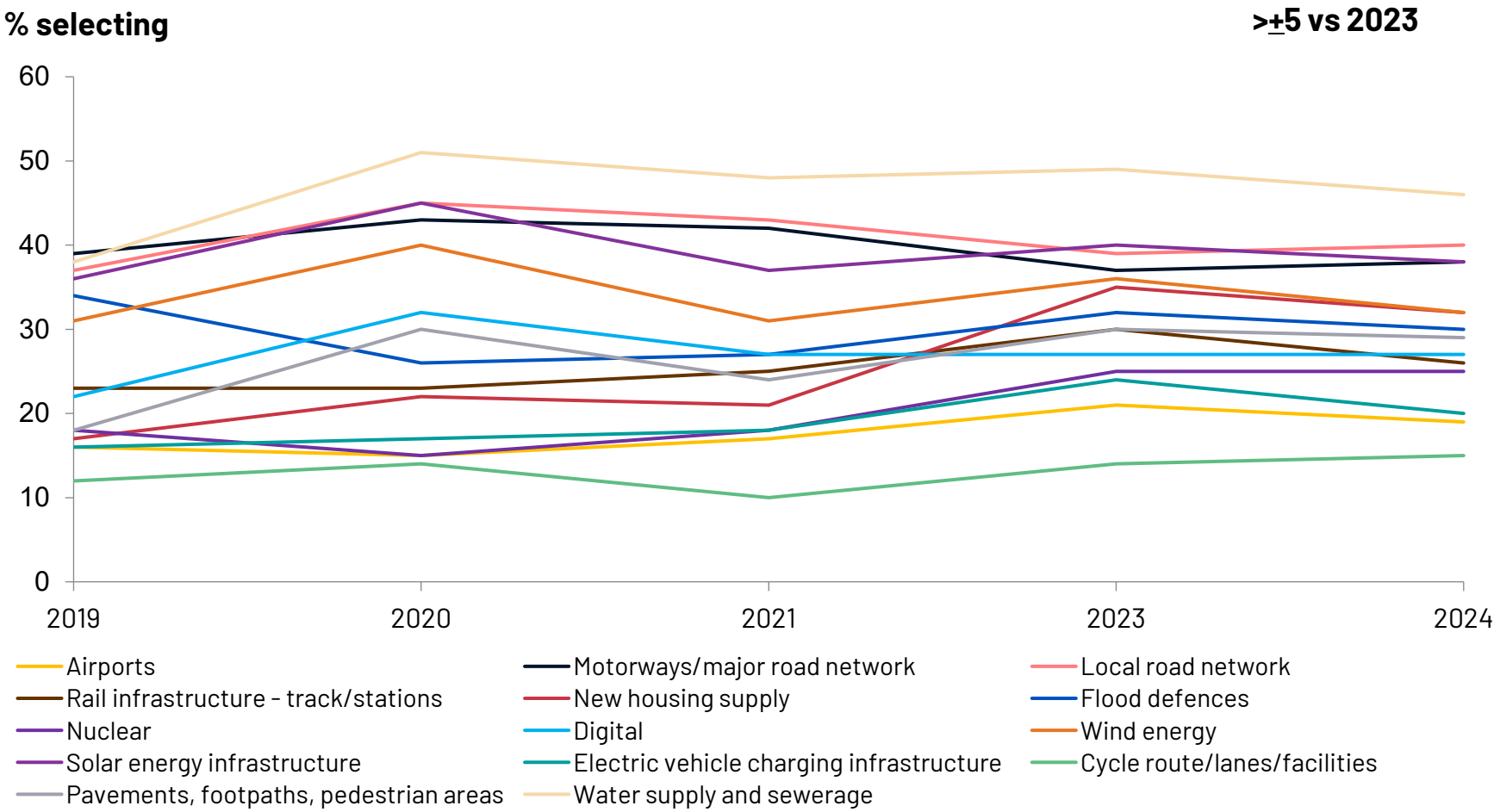
Source: Ipsos/GIIA

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 Great Britain?

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





Source: Ipsos/GIIA

APPENDIX

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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:

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https://giia.net/

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