Global Infrastructure Index

Public satisfaction

and priorities – 2018

Global

Global Infrastructure Investor Association

Ipsos MORI Social Research Institute

The Global Infrastructure Index

Introduction

- These are the findings of the third **Global Infrastructure Index** conducted via Ipsos' Global @dvisor between **24 August – 7 September 2018** in **29 countries** around the world via the Ipsos Online Panel system and involving **20,286** participants:
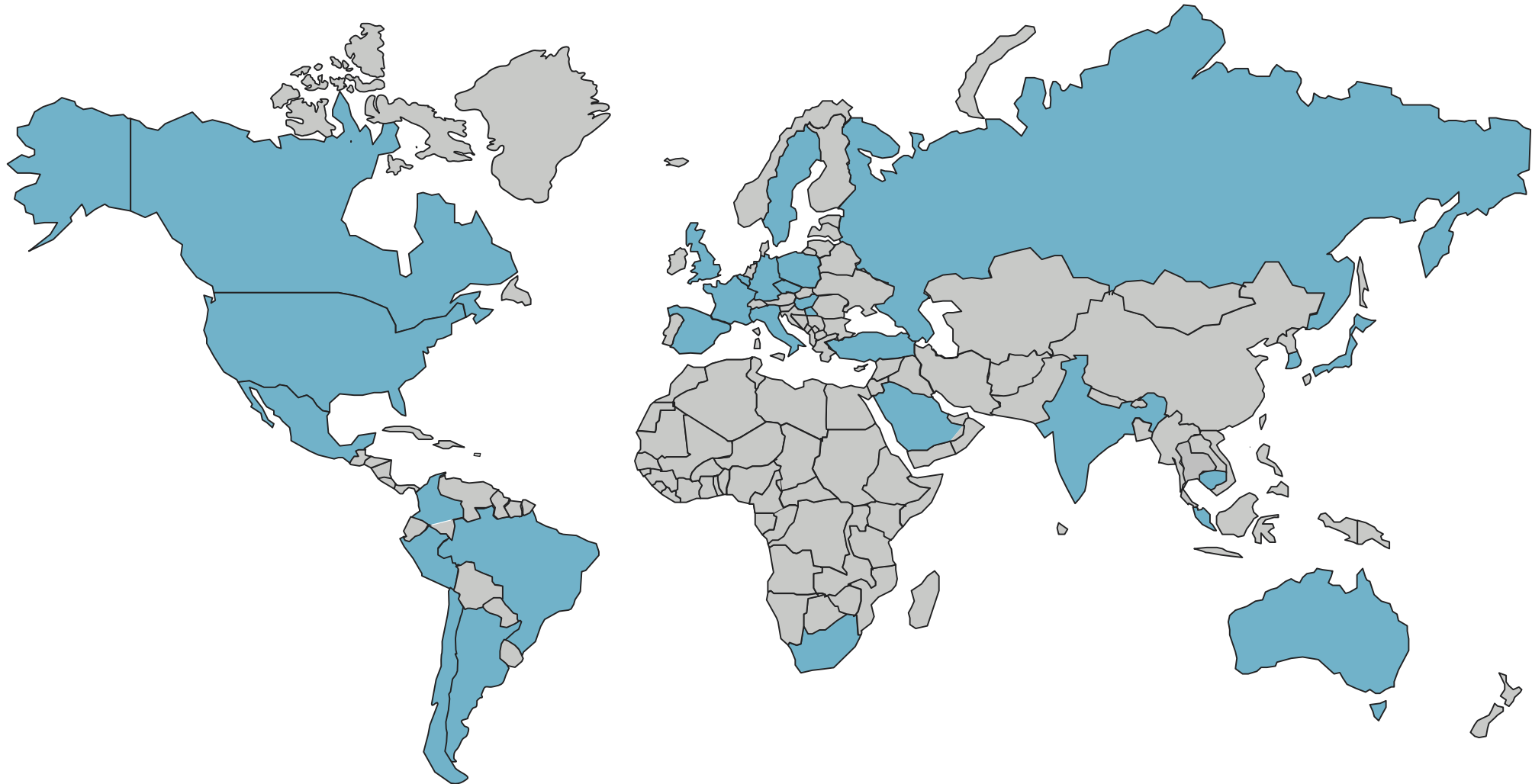
Methodology

- 28 countries, **19,786** participants:
  Argentina, Australia*, Belgium, Brazil, Canada*, Chile, Colombia, France*, Germany*, Great Britain*, Hungary, India*, Italy*, Japan*, Malaysia, Mexico, Peru, Poland, Romania, Russia, Saudi Arabia, South Africa, South Korea, Serbia, Spain*, Sweden, Turkey and the United States of America*
  denotes 1,000+ sample size

- Independently of Global @dvisor, 500 participants were sampled in the **Czech Republic**. Results have been shown in comparative tables but are **not** included in 'global' nor 'Europe' data.

- Participants were adults aged 18-64 in the US and Canada, 18-65 in Czech Republic and adults aged 16-64 in all other countries.

- Results may not sum to 100% and combinations to their constituent %s (e.g. very/fairly satisfied) due to computer rounding.

- The 2016 and 2017 surveys used the same methodology, but the profile of participating countries changed in both years. This means that the **global trend** does not involve a like-for-like comparison. Please note that the survey was also undertaken additionally in the Czech Republic, but results for this country are **not** included in Global totals.

- A selection of trends is included. Further information (with a GB focus) is available:

  https://www.ipsos.com/ipsos-mori/en-uk/rail-joins-housing-top-infrastructure-priorities-britons (2017)

  https://www.ipsos.com/ipsos-mori/en-uk/do-more-poll-shows-britons-behind-action-infrastructure (2016)

Regions

& sample sizes

Europe*

8,541

Belgium
France
Germany
Great Britain
Hungary
Italy
Poland
Romania
Serbia
Spain
Sweden

excluding Czech Republic

N. America

2,001

Canada
U.S.A.

LATAM

3,577

Argentina
Brazil
Chile
Colombia
Mexico
Peru

APAC

4,156

Australia
India
Japan
Malaysia
South Korea

G8

7,678

Canada
France
Germany
Great Britain
Italy
Japan
Russia
U.S.A.

BRIC

2,504

Brazil
India
Russia

ME Africa

1,508

Saudi Arabia
South Africa
Turkey
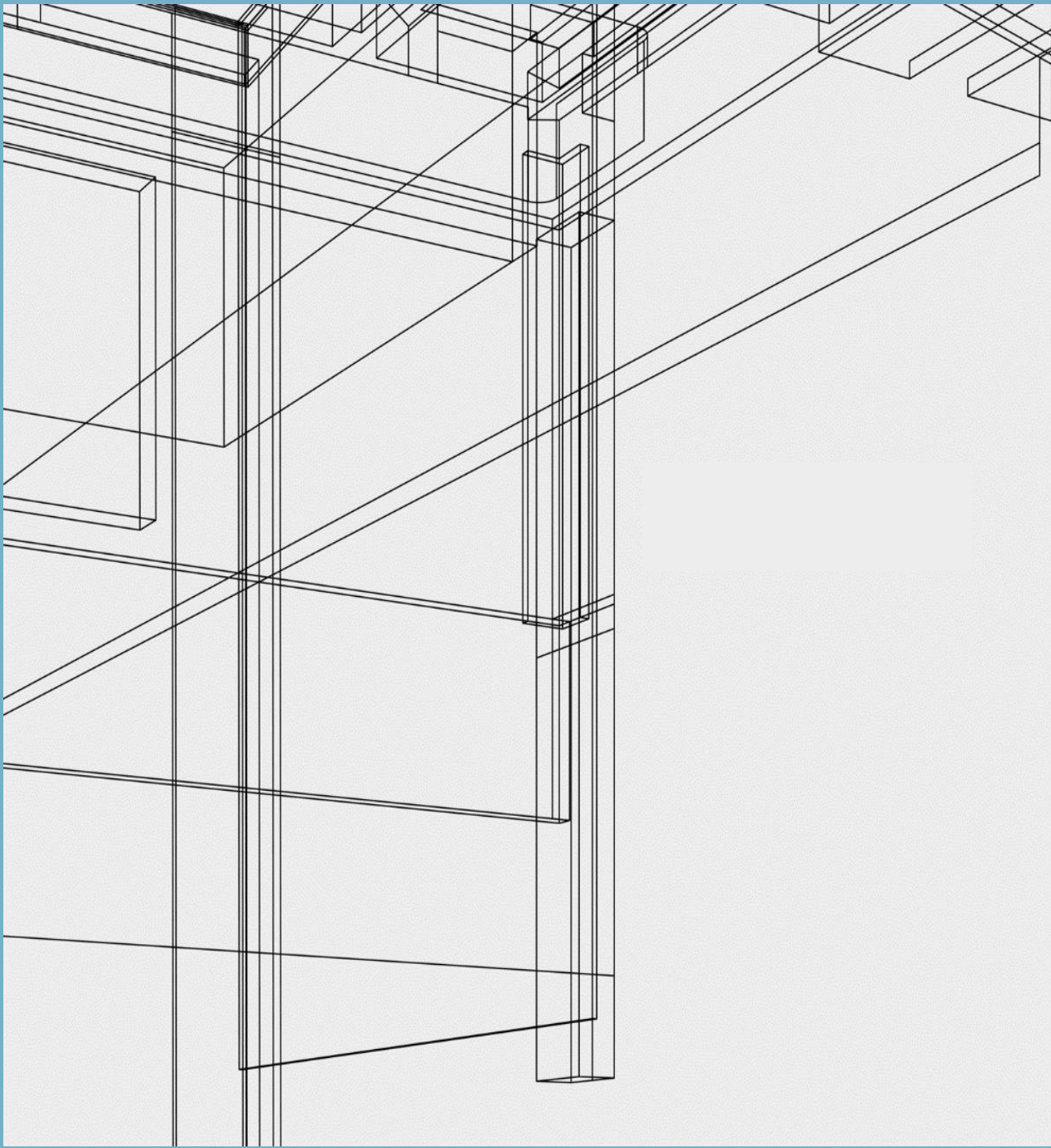
Overall ratings

Global and Regions: Overall ratings

Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I 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?

% very/fairly satisfied

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

Region	% Very/fairly satisfied	% Very/fairly dissatisfied
Global	32	34
North America	30	29
LATAM	30	42
Europe	26	37
APAC	41	23
G8	33	30
BRIC	33	39
ME Africa	45	32

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Trends: Overall ratings

Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I 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?

% very/fairly satisfied

Global
- **32**
- 37
- 33

G8
- **33**
- 37
- 35

Europe
- **26**
- 34
- 31

■ 2018
□ 2017
□ 2016

Source: Ipsos/ GIIA

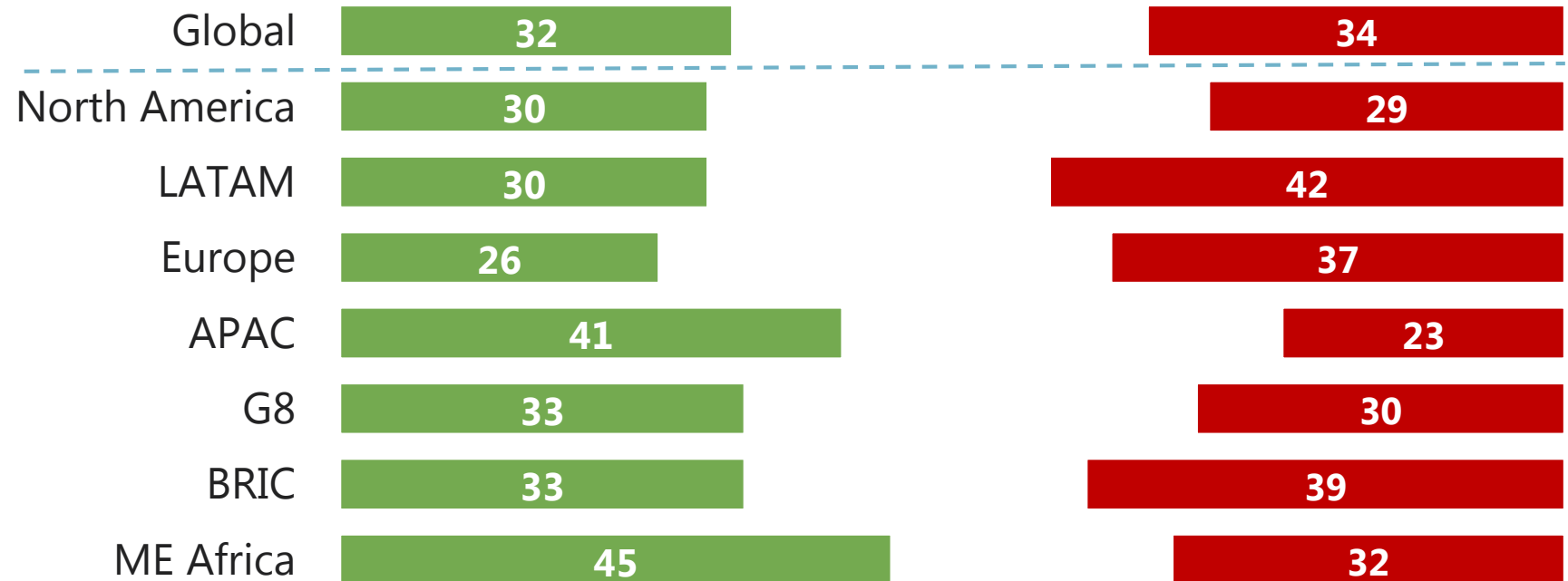Base: 19,786 adults (online), Aug-Sept 2018

Global: Overall

Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I 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?

% very/fairly satisfied

Country	%
Global	32
G8	33
Saudi Arabia	71
India	59
Japan	50
Chile	47
Malaysia	46
Germany	45
Sweden	43
Czech Republic	40
France	38
South Korea	36
Australia	34
Mexico	34
Canada	33
Colombia	33
Poland	32
South Africa	32
Turkey	31
Great Britain	29
Argentina	28
US	28
Russia	27
Peru	25
Serbia	23
Belgium	21
Spain	20
Hungary	14
Italy	14
Brazil	12
Romania	5

Source: Ipsos/ GIIA

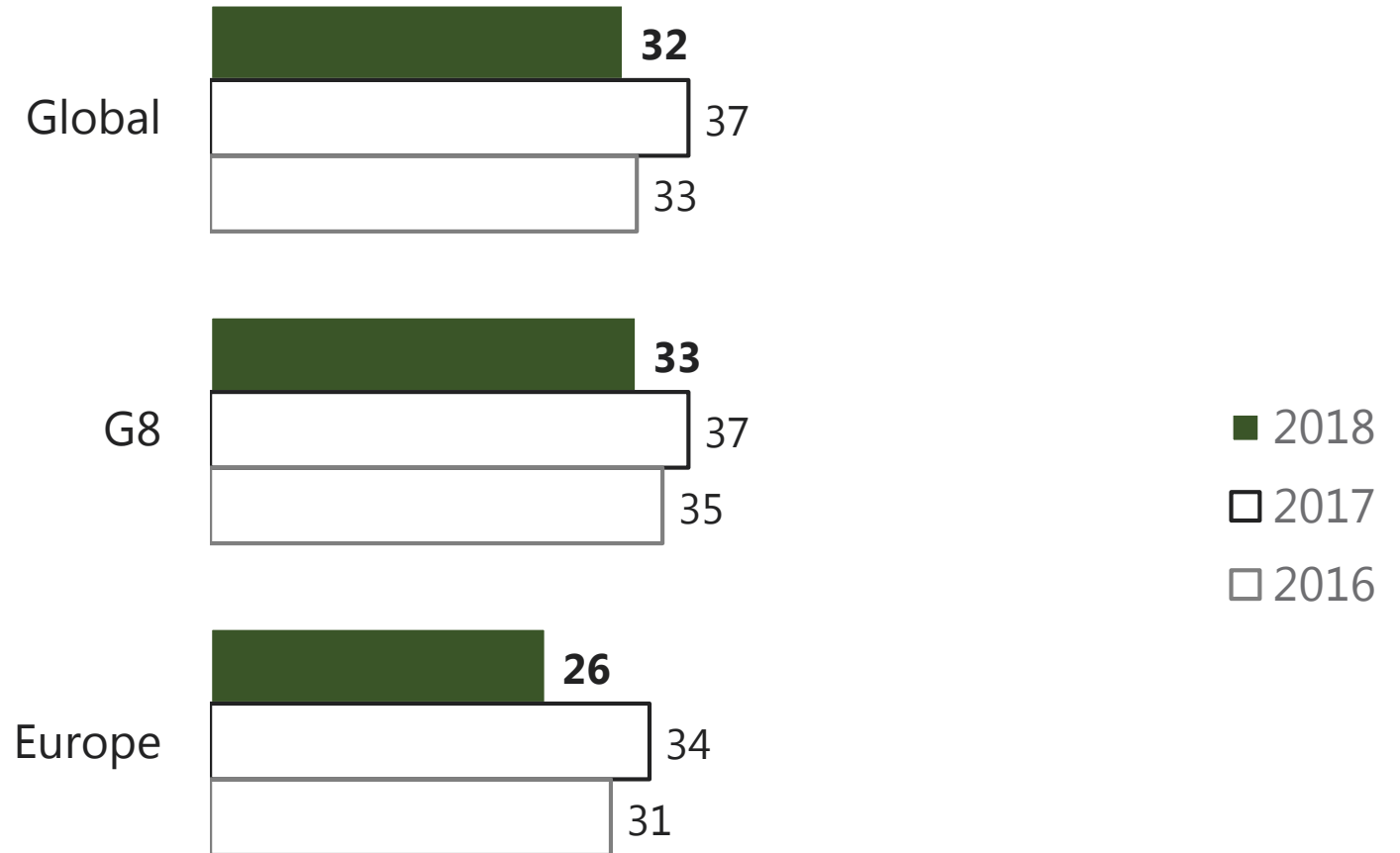Base: 19,786 adults (online), Aug-Sept 2018

Ipsos

Global: Overall

Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I 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?

% very/fairly dissatisfied

Global	34
G8	30
Romania	76
Brazil	69
Italy	53
Argentina	47
Serbia	46
South Africa	45
Hungary	44
Colombia	41
Peru	38
Turkey	36
Belgium	34
Mexico	34
Russia	34
Great Britain	33
US	32
Spain	31
Australia	30
Czech Republic	28
Sweden	28
Canada	25
Poland	23
France	22
Chile	21
Germany	21
Malaysia	19
South Korea	18
Japan	17
India	14
Saudi Arabia	14

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Trends: Overall

The 2016-18 surveys used the same methodology, but the profile of participating countries changed between years. This means that the **global and regional trends** do not always involve a strict like-for-like comparison.
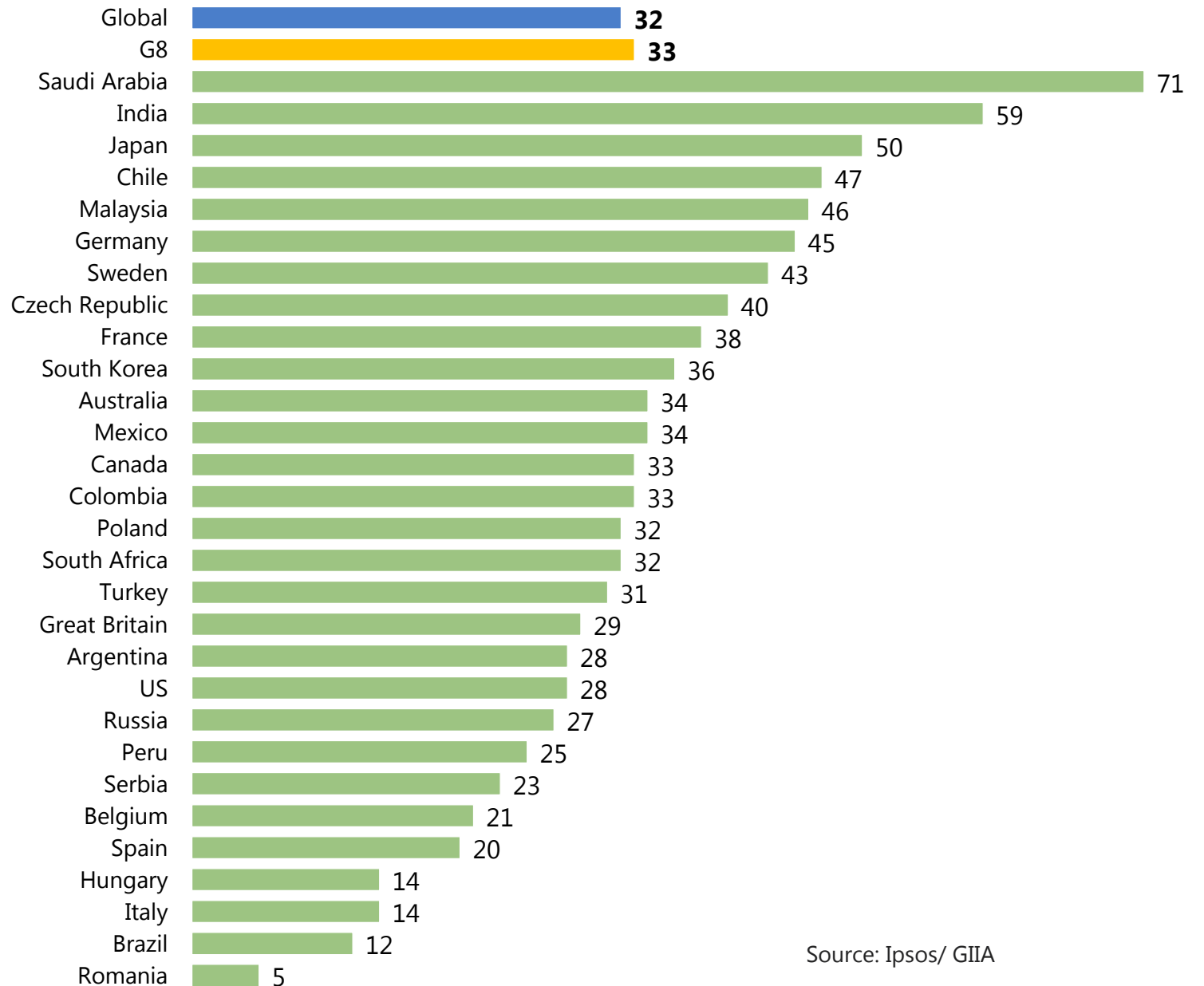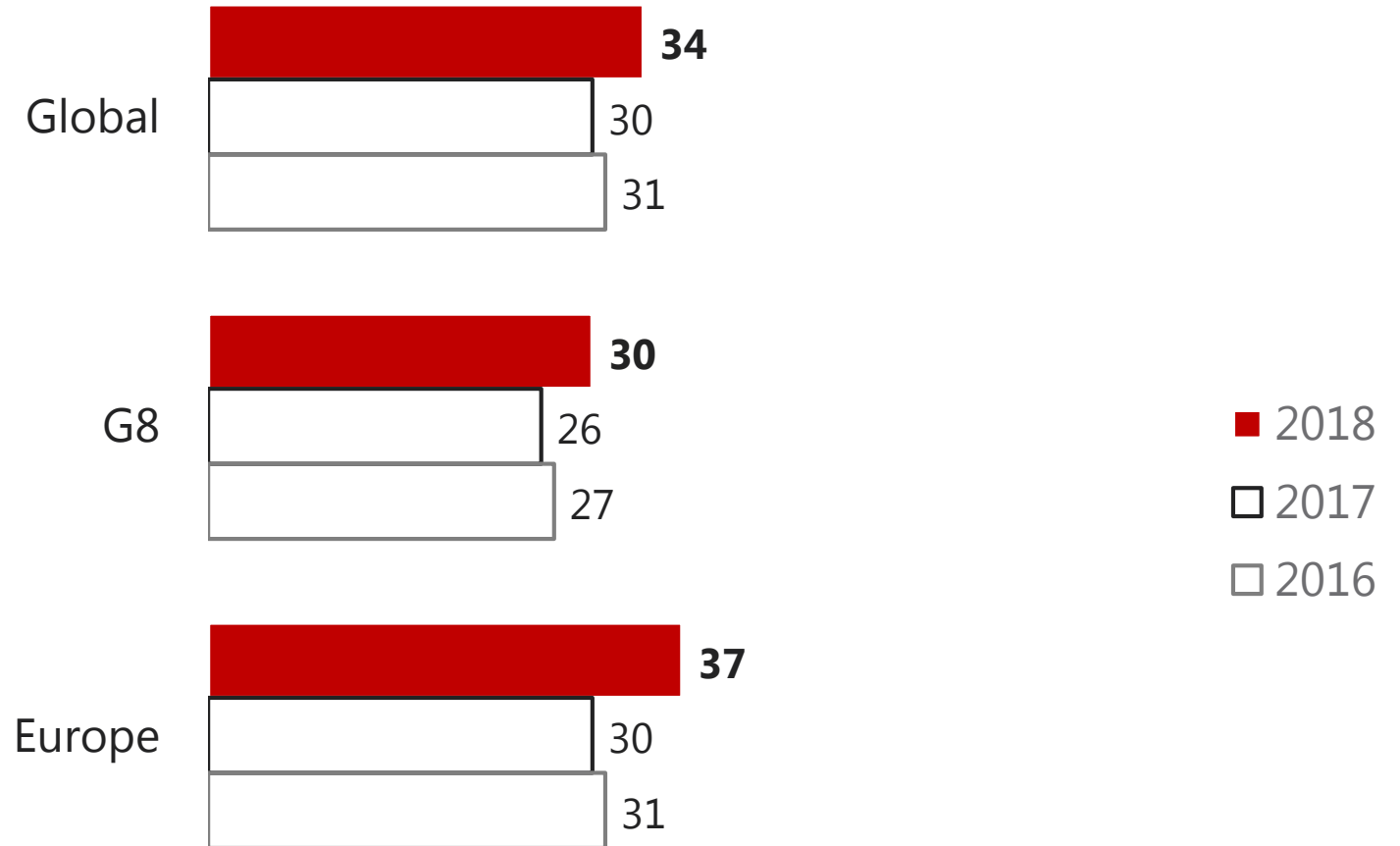
Q. I now want you to think about [COUNTRY'S] infrastructure.

By infrastructure I 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?

% very/fairly dissatisfied

Global: 34 (2018), 30 (2017), 31 (2016)
G8: 30 (2018), 26 (2017), 27 (2016)
Europe: 37 (2018), 30 (2017), 31 (2016)

■ 2018
□ 2017
□ 2016

G8: Overall ratings v GCI

% very/fairly satisfied overall

‘Over-performing’ – public perception

‘Under-performing’
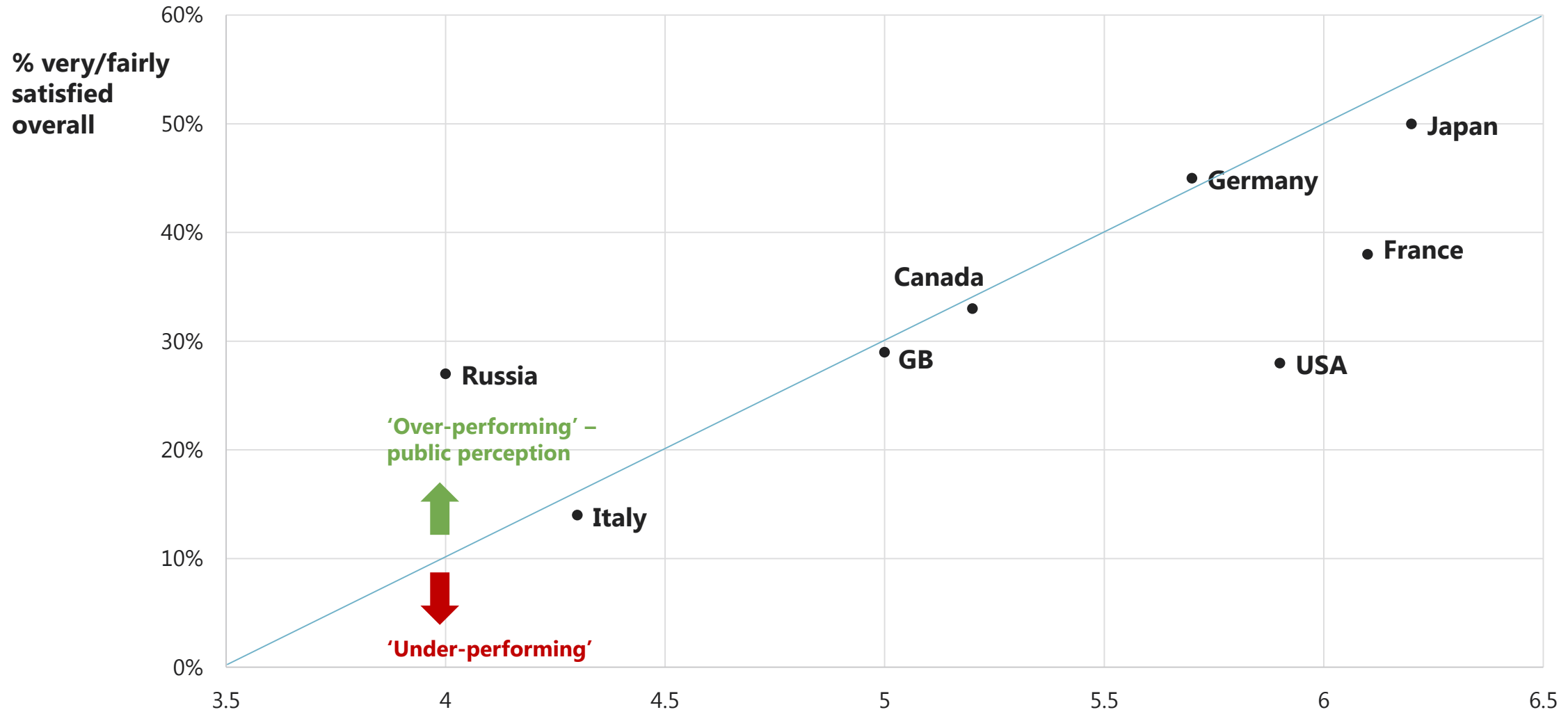
* Source: The World Economic Forum's Global Competitiveness Report 2017-2018. The chart shows the GCI rating (2.01) for "infrastructure overall" (1-7 where 7=best).

GCI - Global Competitiveness Index (2.01)*

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018
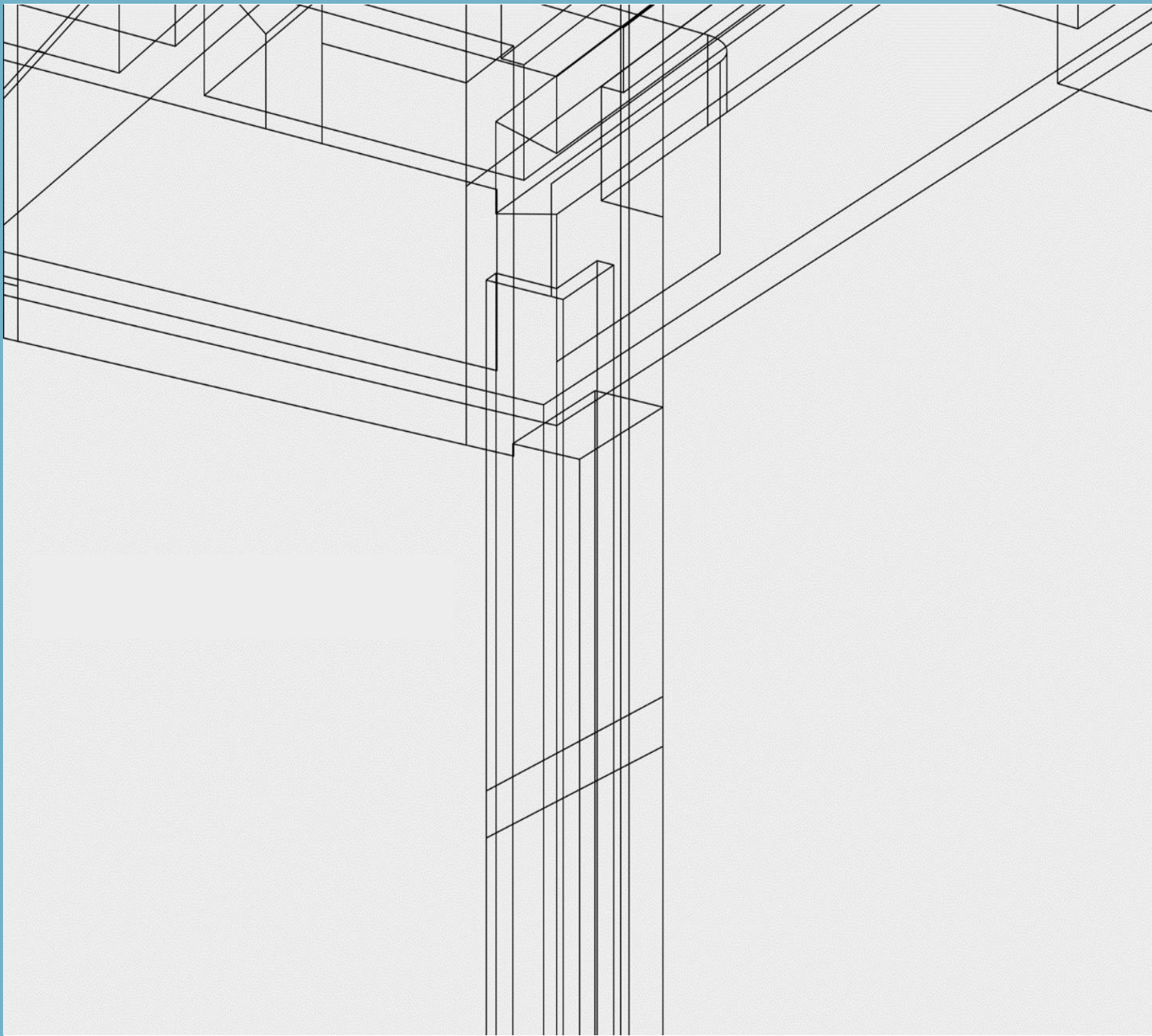
Sectors – ratings

Global: Sectors

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]...

Sector	% Very/fairly good	% Fairly/very poor
Airports	67	23
Digital infrastructure such as broadband...*	54	38
Water supply and sewerage	52	41
Motorways/major roads	50	44
Energy-generation infrastructure	43	41
New housing supply	42	48
Local road network	41	53
Rail infrastructure (track/stations)	41	49
Nuclear infrastructure to generate energy	31	40
Flood defences	28	58

* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018

Ipsos

Source: Ipsos/ GIIA

Ranked by % very/fairly good

Base: 19,786 adults (online), Aug-Sept 2018

G8: Sectors

■ % Very/fairly good   ■ % Fairly/very poor

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]…

Sector	% Very/fairly good	% Fairly/very poor
Airports	65	19
Digital infrastructure such as broadband…*	51	36
Water supply and sewerage	57	30
Motorways/major roads	49	40
Energy-generation infrastructure	47	31
New housing supply	38	44
Local road network	38	52
Rail infrastructure (track/stations)	45	40
Nuclear infrastructure to generate energy	37	31
Flood defences	30	49

* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018

Ipsos   Source: Ipsos/ GIIA

Ranked by % very/fairly good (global)

Base: 19,786 adults (online), Aug-Sept 2018

G8: Sector ratings – trends

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]...

% very/fairly good

Airports
- 65
- 65
- 66

Water supply and sewerage
- 57
- 60
- 60

Motorways/major roads
- 49
- 53
- 55

Digital
- 51
- 54
- 56

Local road network
- 38
- 43
- 43

Energy-generation infrastructure
- 47
- 47
- 48

Nuclear infrastructure to generate energy
- 37
- 37
- 36

Flood defences
- 30
- 31
- 30

Rail infrastructure (track/stations)
- 45
- 48
- 49

New housing supply
- 38
- 42
- 40
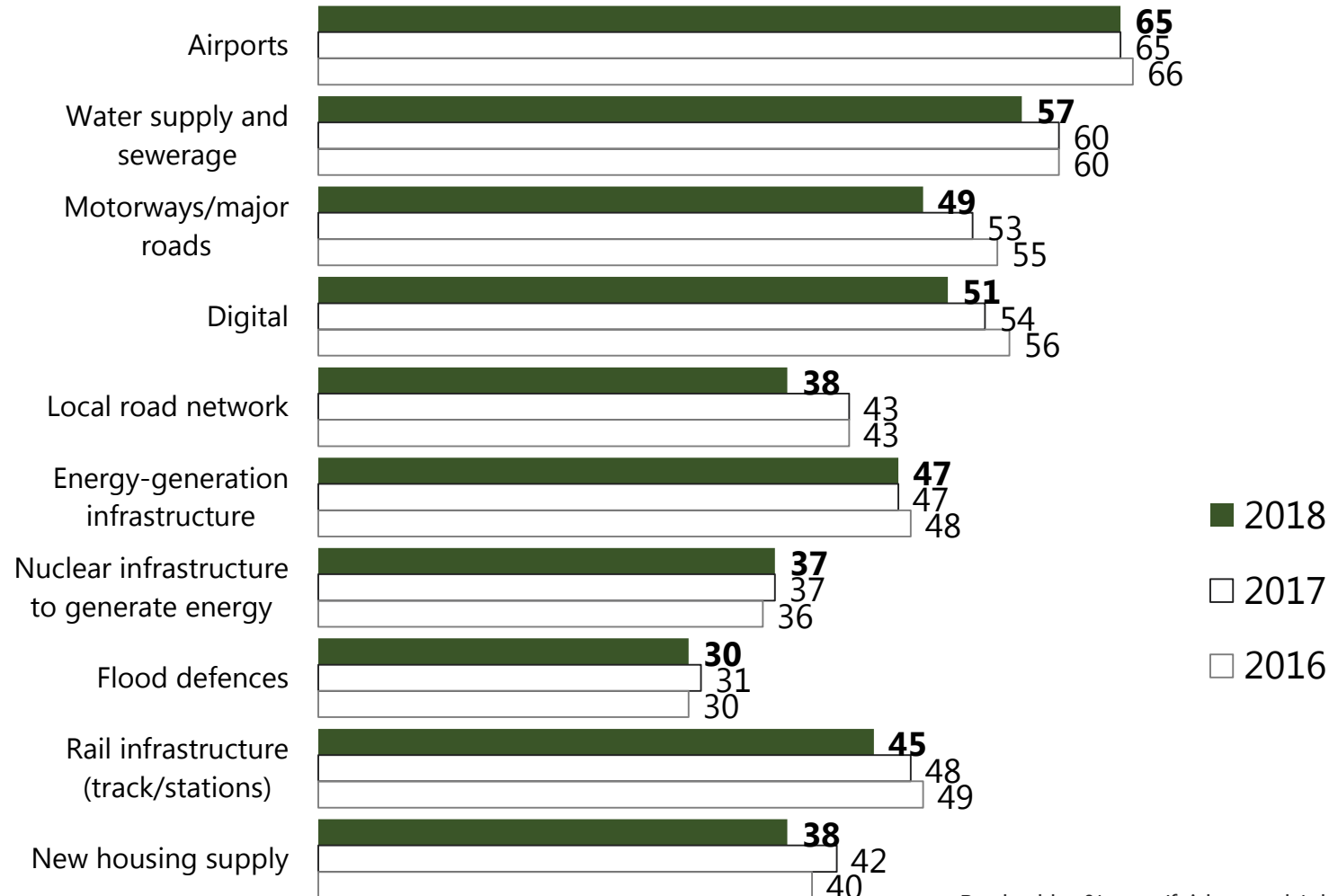
■ 2018
□ 2017
□ 2016

Ranked by % very/fairly good (global, 2018)
Base: 19,786 adults (online), Aug-Sept 2018

Source: Ipsos/ GIIA

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G8: Sector ratings – trends

% very/fairly good

Legend:
- Airports
- Motorways/major roads
- Local road network
- Rail infrastructure
- New housing supply
- Flood defences
- Energy generation
- Nuclear
- Digital
- Water supply and sewerage

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

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G8: Overall ratings v average sector ratings

% very/fairly good - sector average

% very/fairly satisfied - overall

- Russia
- USA
- GB
- Canada
- France
- Germany
- Japan
- Italy

Better at sector level

Better at overall level

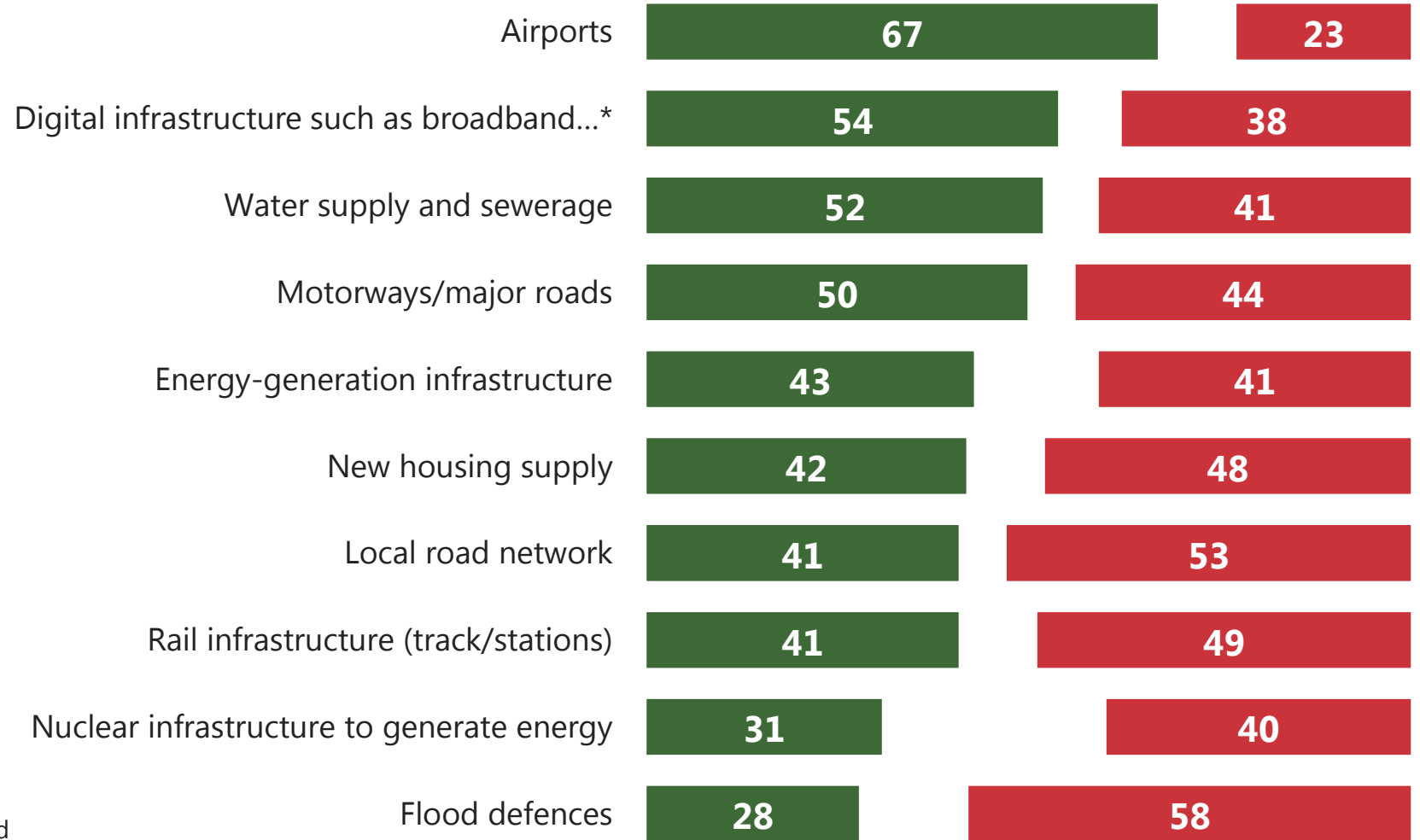Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

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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

% very/fairly good

Country	% very/fairly good
Global	67
G8	65
India	83
Malaysia	82
South Africa	80
Saudi Arabia	78
South Korea	78
Turkey	74
Colombia	73
Argentina	72
Chile	72
Peru	72
Australia	71
Canada	71
Belgium	69
France	67
Great Britain	67
Russia	67
Sweden	67
Germany	65
Mexico	65
Serbia	65
Czech Republic	63
US	63
Poland	61
Italy	60
Japan	59
Spain	57
Brazil	48
Hungary	47
Romania	33

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Motorways

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]…

Motorways/ major roads

| % very/fairly good |

Country	Value
Global	50
G8	49
Saudi Arabia	77
South Korea	77
Turkey	74
Malaysia	70
France	63
Sweden	63
India	62
Chile	59
Germany	59
Japan	58
Great Britain	54
Serbia	54
South Africa	52
Australia	50
Poland	50
Mexico	47
US	46
Argentina	45
Russia	45
Spain	44
Canada	42
Colombia	42
Hungary	38
Peru	38
Belgium	32
Italy	29
Brazil	22
Czech Republic	22
Romania	5

Local roads

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]…
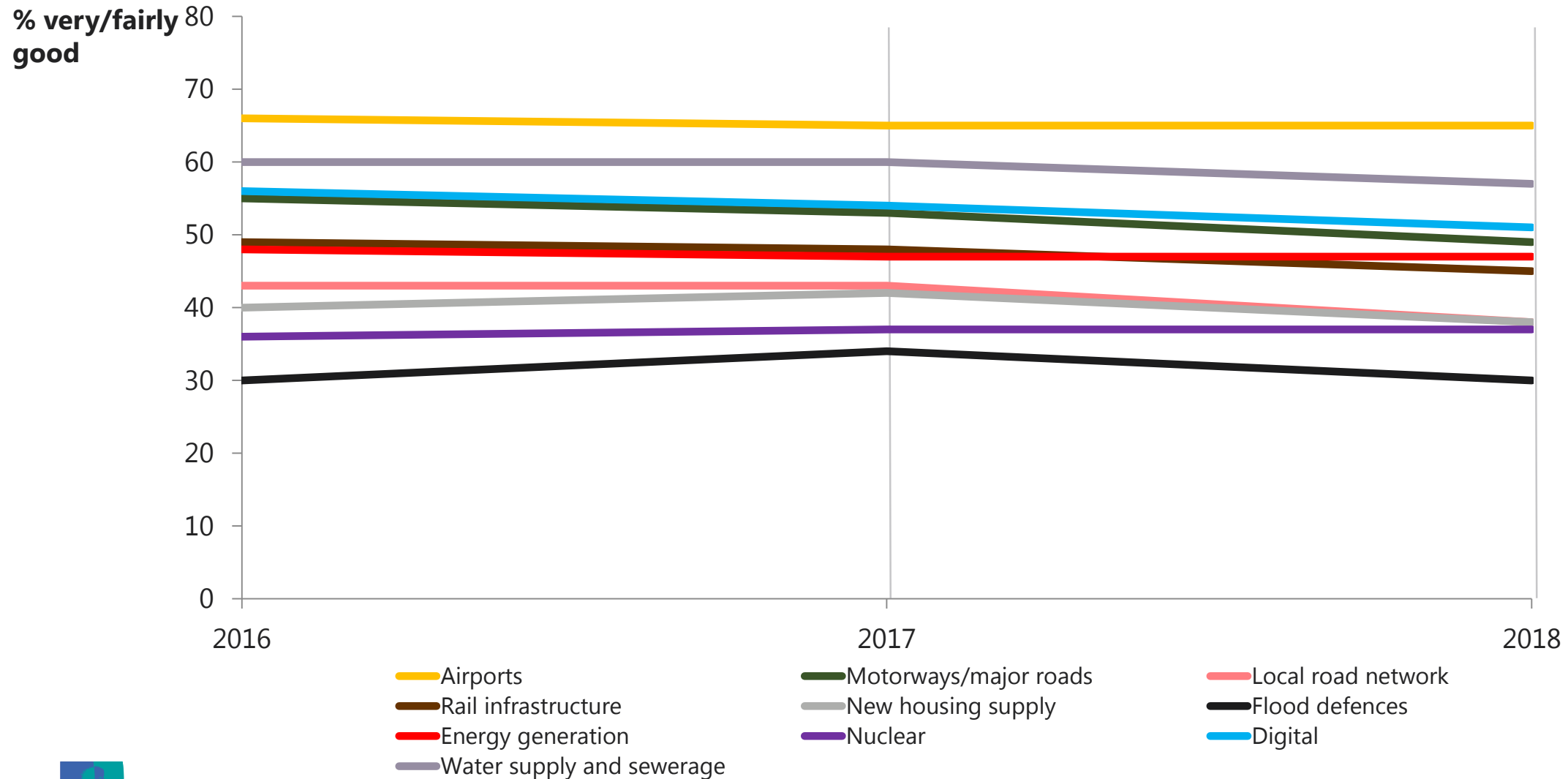
Local road network

% very/fairly good

Country	% very/fairly good
Global	41
G8	38
Saudi Arabia	71
South Korea	69
Turkey	58
Malaysia	53
India	52
Germany	50
Sweden	50
Chile	49
Australia	47
Japan	46
Argentina	45
France	44
Great Britain	42
Mexico	42
South Africa	42
US	42
Spain	41
Colombia	40
Canada	38
Poland	38
Peru	37
Czech Republic	32
Belgium	26
Russia	26
Serbia	26
Brazil	25
Italy	20
Hungary	15
Romania	12
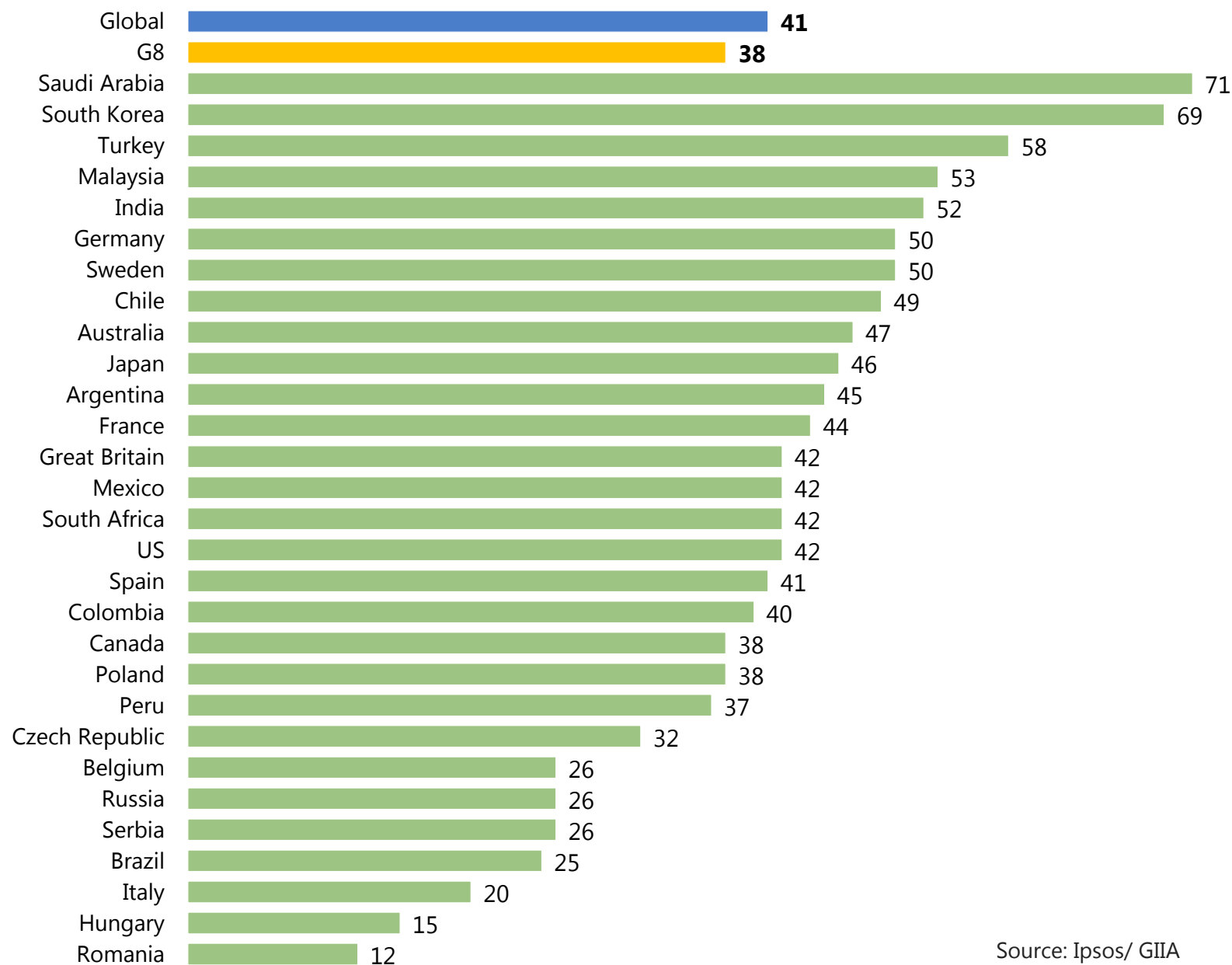
Rail

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

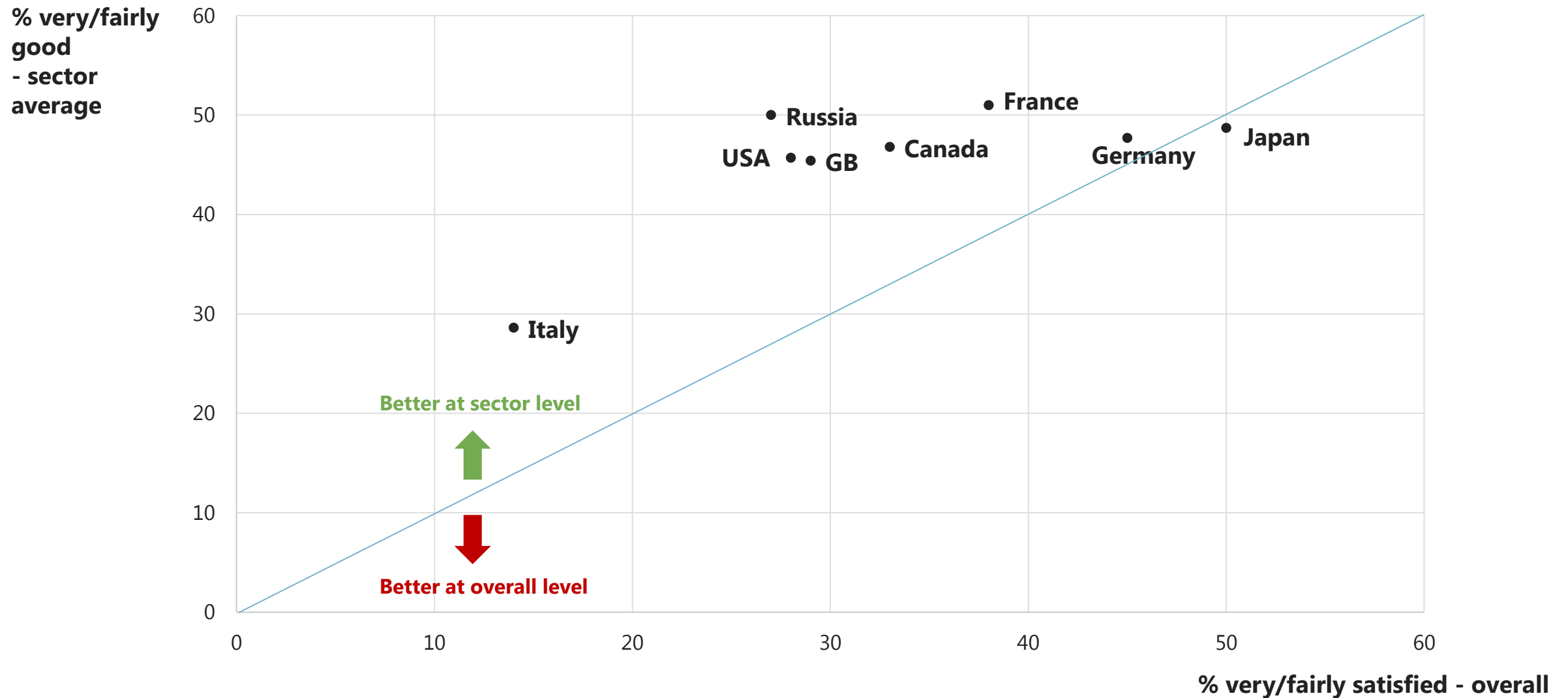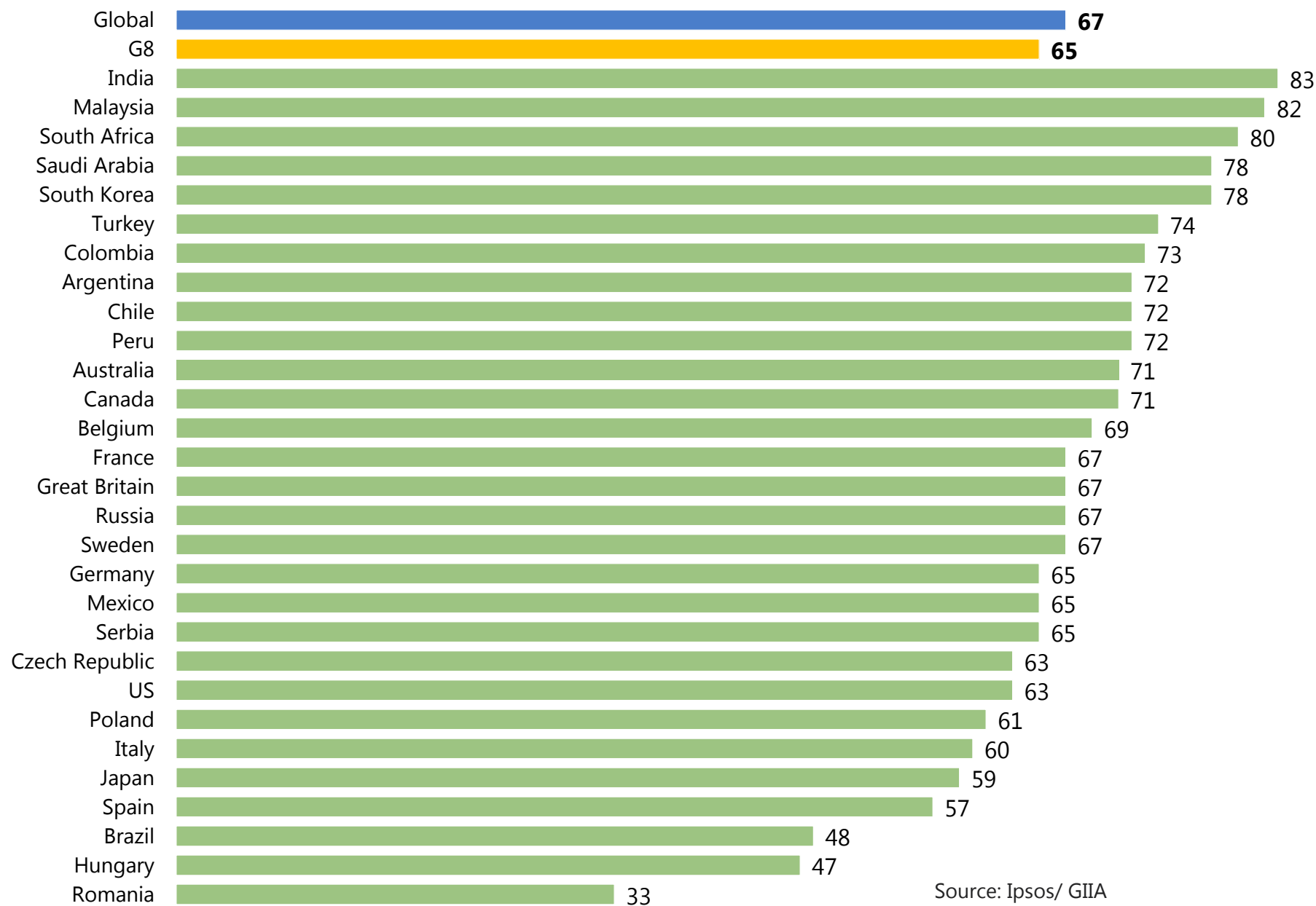**Please indicate how good or poor you rate the current quality of each one in [COUNTRY]…**

Rail infrastructure (track/stations)

% very/fairly good

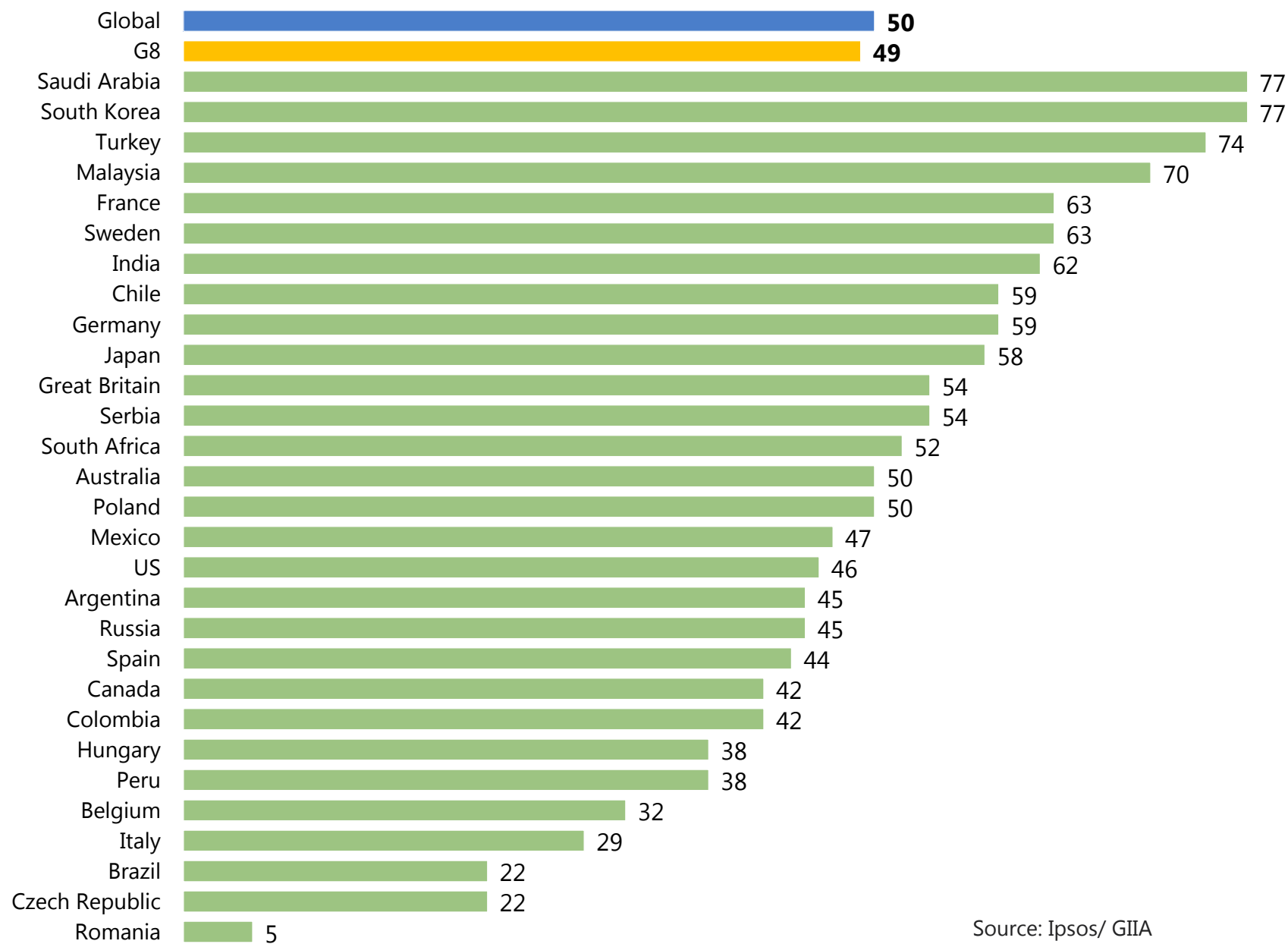| Country	%
Global	41
G8	45
South Korea	71
Saudi Arabia	68
India	66
Czech Republic	63
Russia	63
Japan	60
Malaysia	59
Turkey	55
Germany	48
Australia	46
Chile	46
Canada	44
Spain	44
France	41
US	41
Poland	40
Argentina	38
Belgium	38
Sweden	38
Peru	37
Mexico	34
Great Britain	33
South Africa	33
Italy	26
Colombia	24
Hungary	20
Brazil	17
Serbia	13
Romania	8

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

% very/fairly good

Country	Value
Global	42
G8	38
Saudi Arabia	69
India	60
Serbia	59
Turkey	59
Hungary	55
Colombia	53
Malaysia	53
Chile	51
US	49
Australia	48
France	48
Peru	46
Canada	45
Belgium	44
Japan	42
Czech Republic	40
Mexico	38
Poland	38
Russia	38
South Korea	36
Romania	33
Great Britain	31
Italy	29
Spain	29
Argentina	28
South Africa	27
Germany	25
Sweden	25
Brazil	20

Source: Ipsos/ GIIA

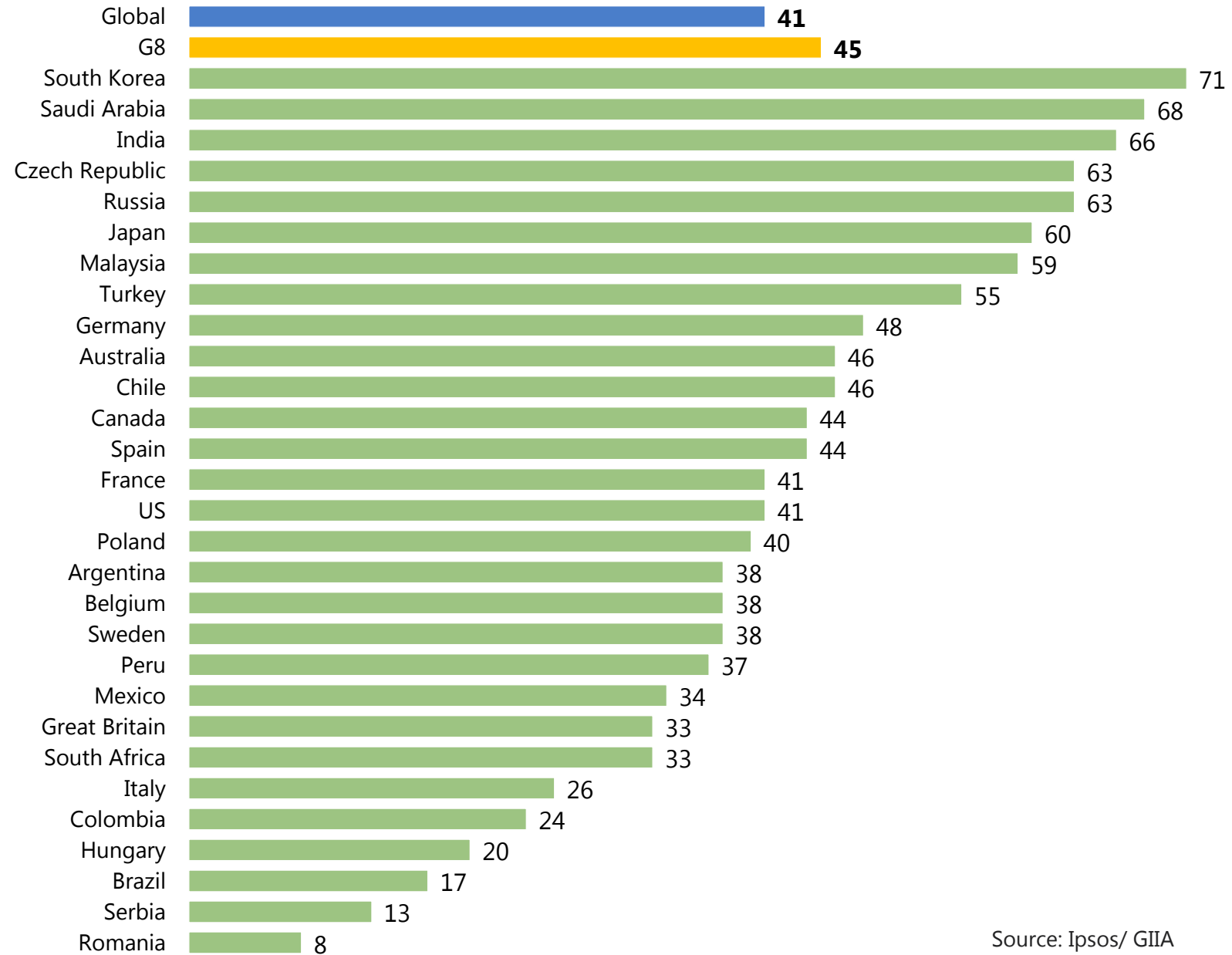Base: 19,786 adults (online), Aug-Sept 2018

Ipsos

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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

% very/fairly good

Country	Value
Global	28
G8	30
Saudi Arabia	58
Hungary	47
Germany	45
India	40
Australia	38
Czech Republic	38
Great Britain	35
South Korea	34
Canada	33
France	31
US	31
Belgium	29
Malaysia	29
Poland	29
Sweden	29
Chile	28
Japan	28
Russia	28
South Africa	27
Turkey	24
Argentina	23
Colombia	21
Serbia	21
Spain	20
Mexico	19
Peru	16
Brazil	13
Romania	10
Italy	9

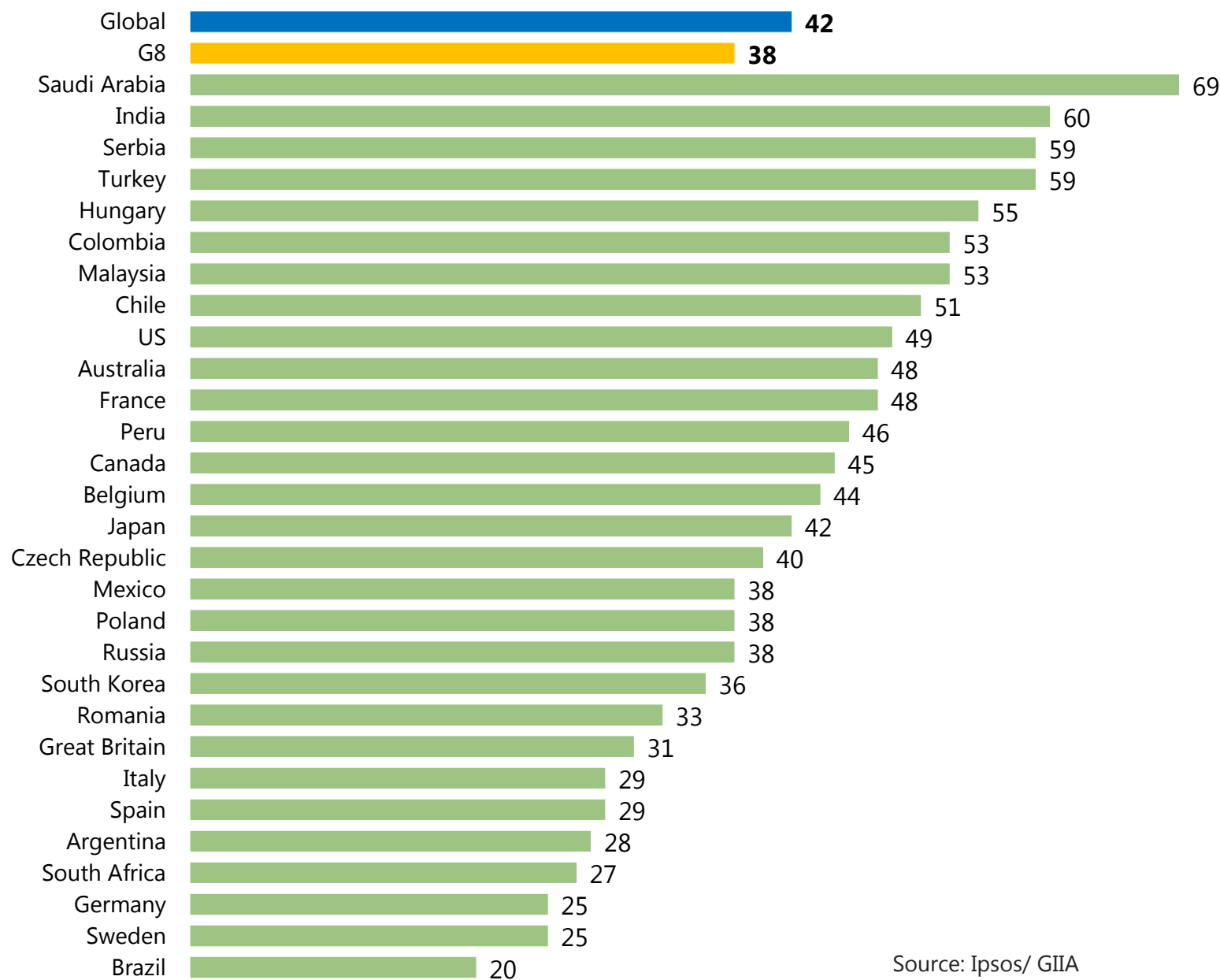Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

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]...

Energy-generation infrastructure

% very/fairly good

Country	Value
Global	43
G8	47
Saudi Arabia	69
India	65
Russia	65
Czech Republic	62
Malaysia	61
Serbia	52
France	51
Germany	50
Chile	48
Canada	47
Japan	47
South Korea	47
Sweden	45
US	43
Colombia	42
Mexico	40
Peru	40
Turkey	40
Belgium	39
Great Britain	39
Argentina	32
Australia	32
Brazil	32
Italy	32
South Africa	32
Hungary	31
Poland	31
Romania	26
Spain	24

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

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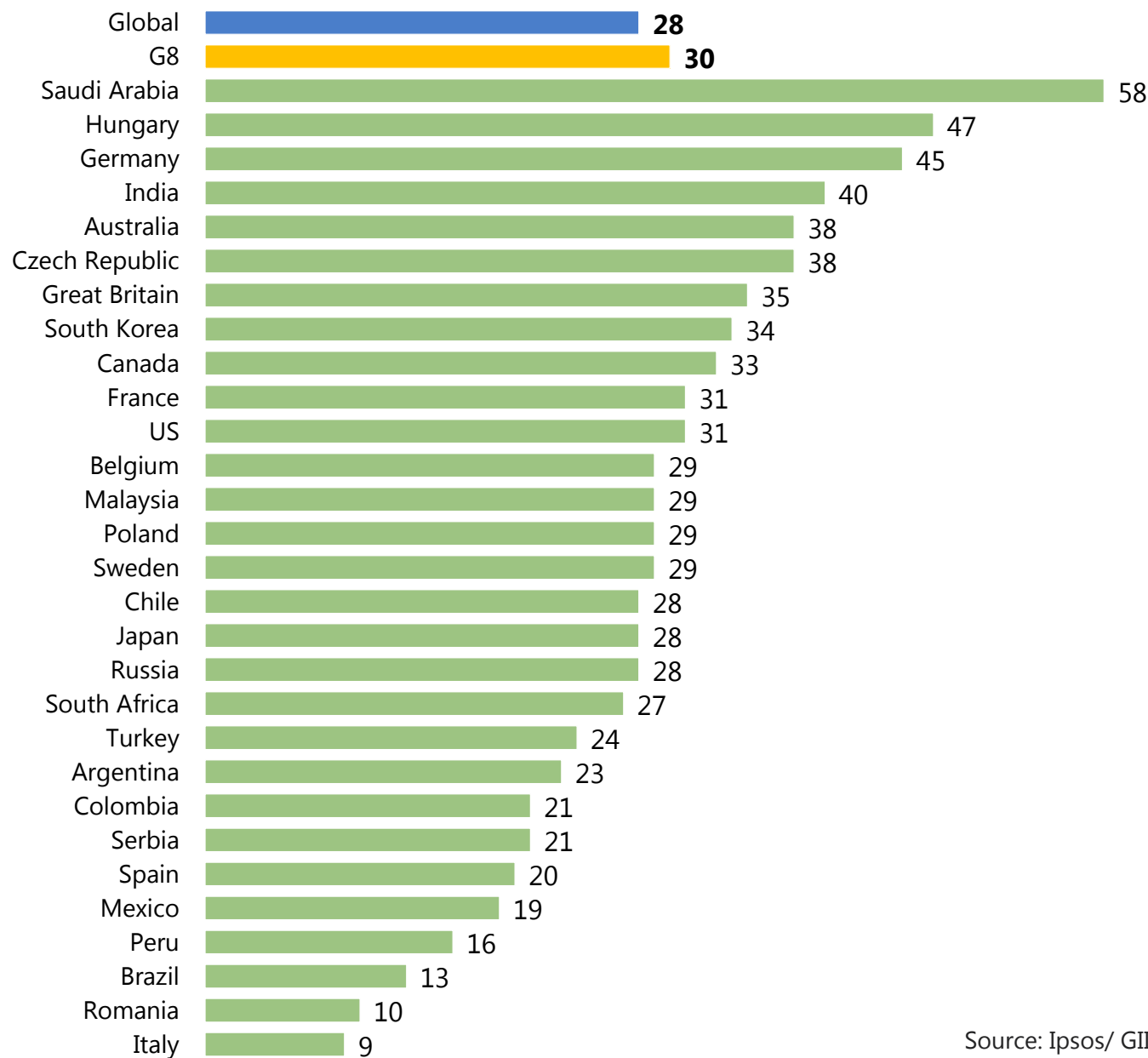
Q. These next questions are about different types of infrastructure.

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

Nuclear infrastructure to generate energy

% very/fairly good

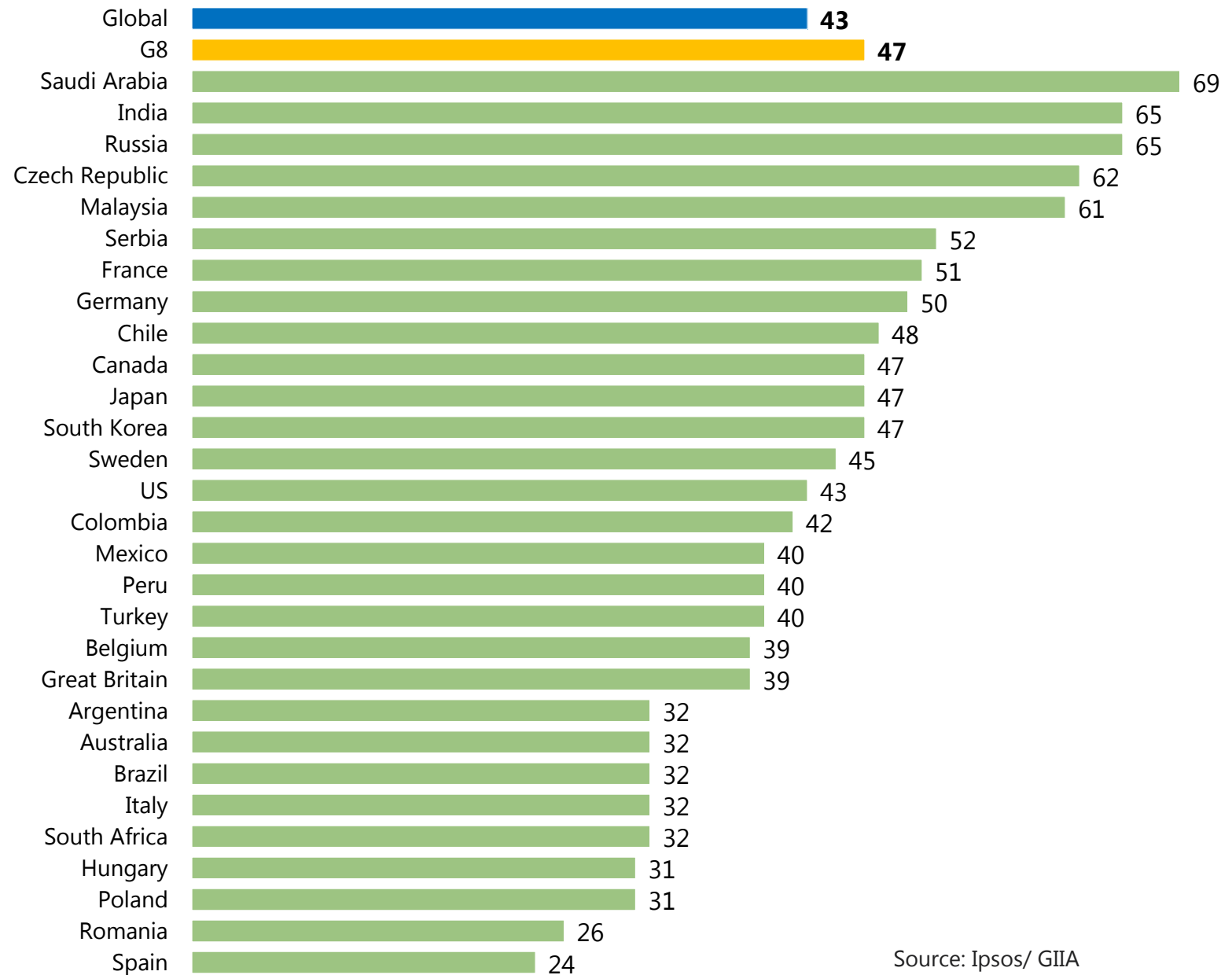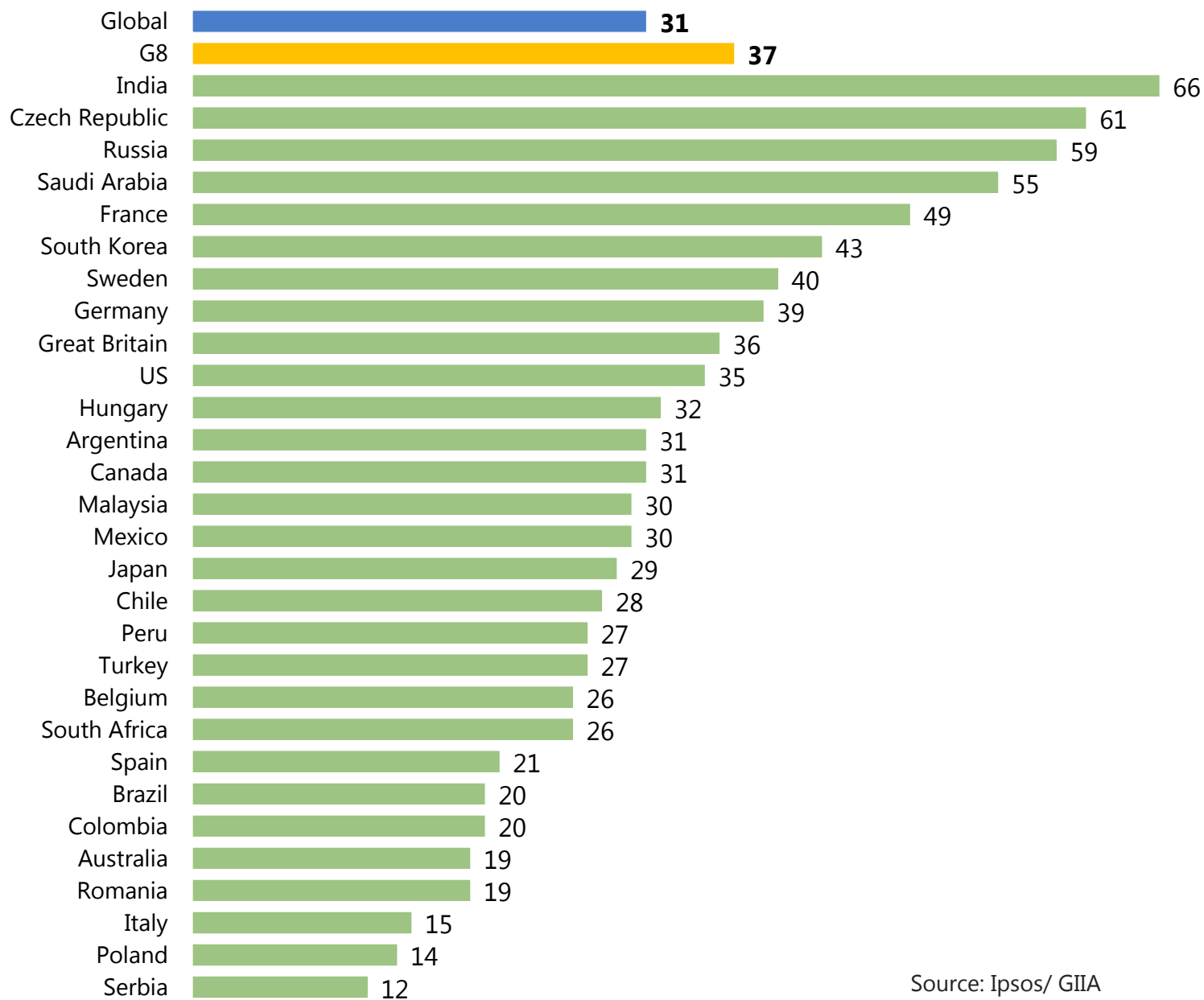| Country	% very/fairly good
Global	31
G8	37
India	66
Czech Republic	61
Russia	59
Saudi Arabia	55
France	49
South Korea	43
Sweden	40
Germany	39
Great Britain	36
US	35
Hungary	32
Argentina	31
Canada	31
Malaysia	30
Mexico	30
Japan	29
Chile	28
Peru	27
Turkey	27
Belgium	26
South Africa	26
Spain	21
Brazil	20
Colombia	20
Australia	19
Romania	19
Italy	15
Poland	14
Serbia	12

Digital

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 network (FTTP), 5G*

% very/fairly good

* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017

Country	Value
Global	54
G8	51
South Korea	78
India	70
Saudi Arabia	69
Sweden	68
Russia	66
Serbia	65
Colombia	64
Czech Republic	62
Romania	62
Chile	60
Hungary	60
Poland	57
Japan	56
US	56
Belgium	55
Mexico	55
Canada	52
Great Britain	52
France	50
South Africa	50
Peru	48
Malaysia	44
Argentina	43
Turkey	42
Spain	40
Italy	37
Germany	35
Australia	34
Brazil	31

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018
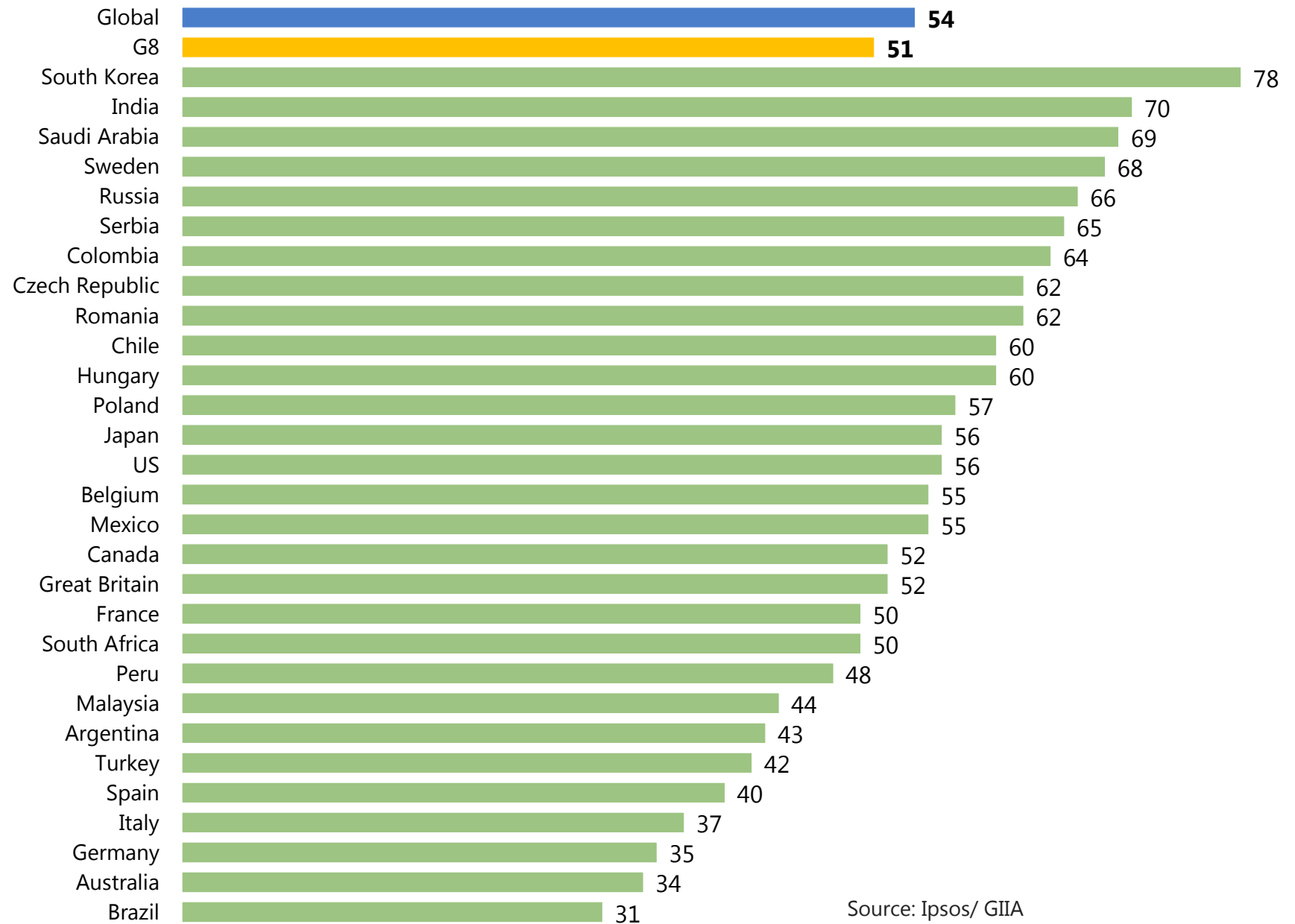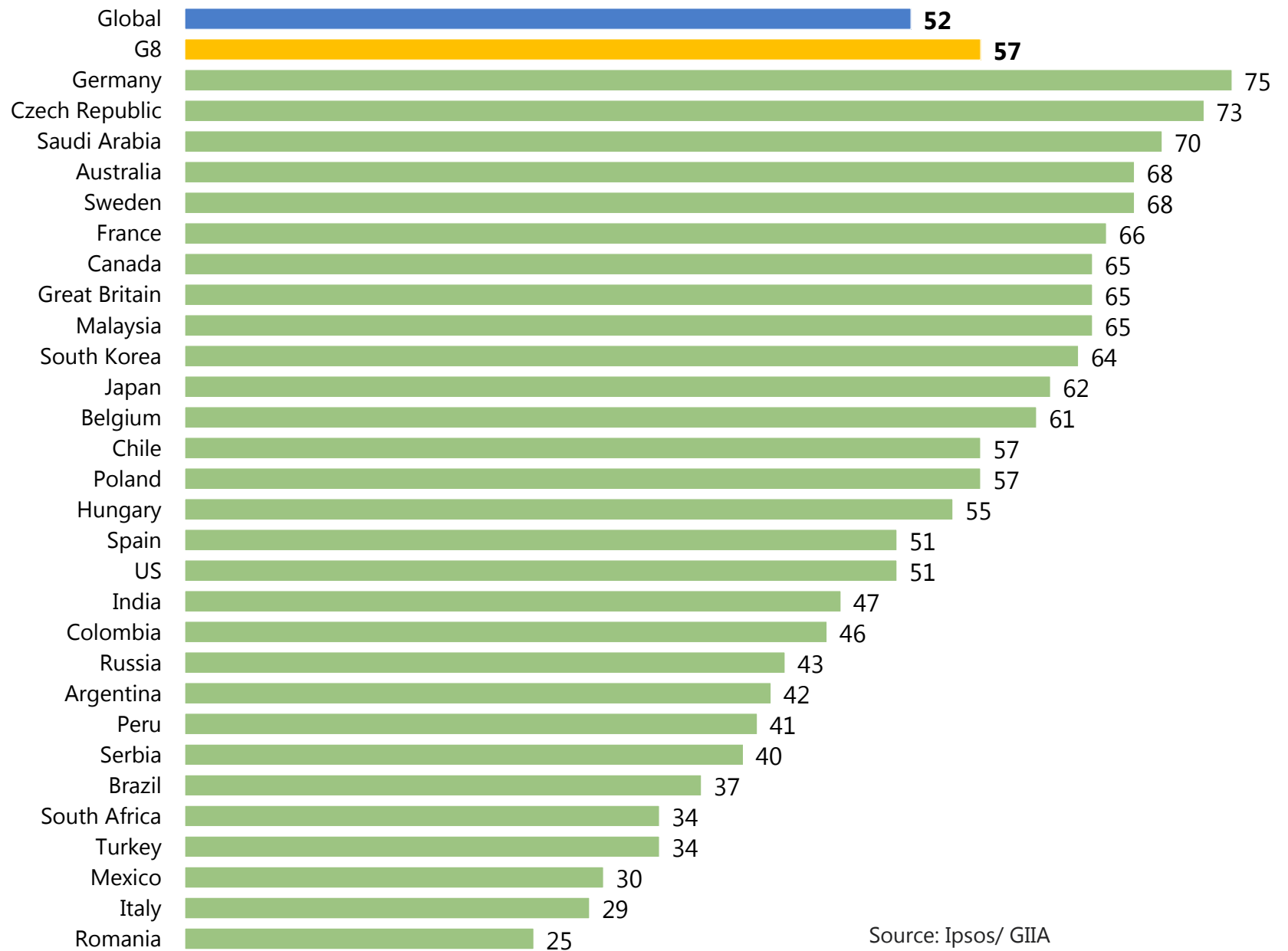
Ipsos

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 and sewerage

% very/fairly good

Global	52
G8	57
Germany	75
Czech Republic	73
Saudi Arabia	70
Australia	68
Sweden	68
France	66
Canada	65
Great Britain	65
Malaysia	65
South Korea	64
Japan	62
Belgium	61
Chile	57
Poland	57
Hungary	55
Spain	51
US	51
India	47
Colombia	46
Russia	43
Argentina	42
Peru	41
Serbia	40
Brazil	37
South Africa	34
Turkey	34
Mexico	30
Italy	29
Romania	25

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Ipsos

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Priorities

Global and G8: Priorities

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

The local road network — **45** / 46

Water supply and sewerage — **43** / 33

Motorway/major road network — **42** / 36

Flood defences — **41** / 35

Rail infrastructure - track/stations — **40** / 31

New housing supply — **36** / 31

Energy-generating infrastructure — **35** / 29

Digital infrastructure such as high speed broadband...* — **32** / 29

Nuclear infrastructure to generate energy — **17** / 13

Airports — **17** / 11

■ **% Global**

■ % G8
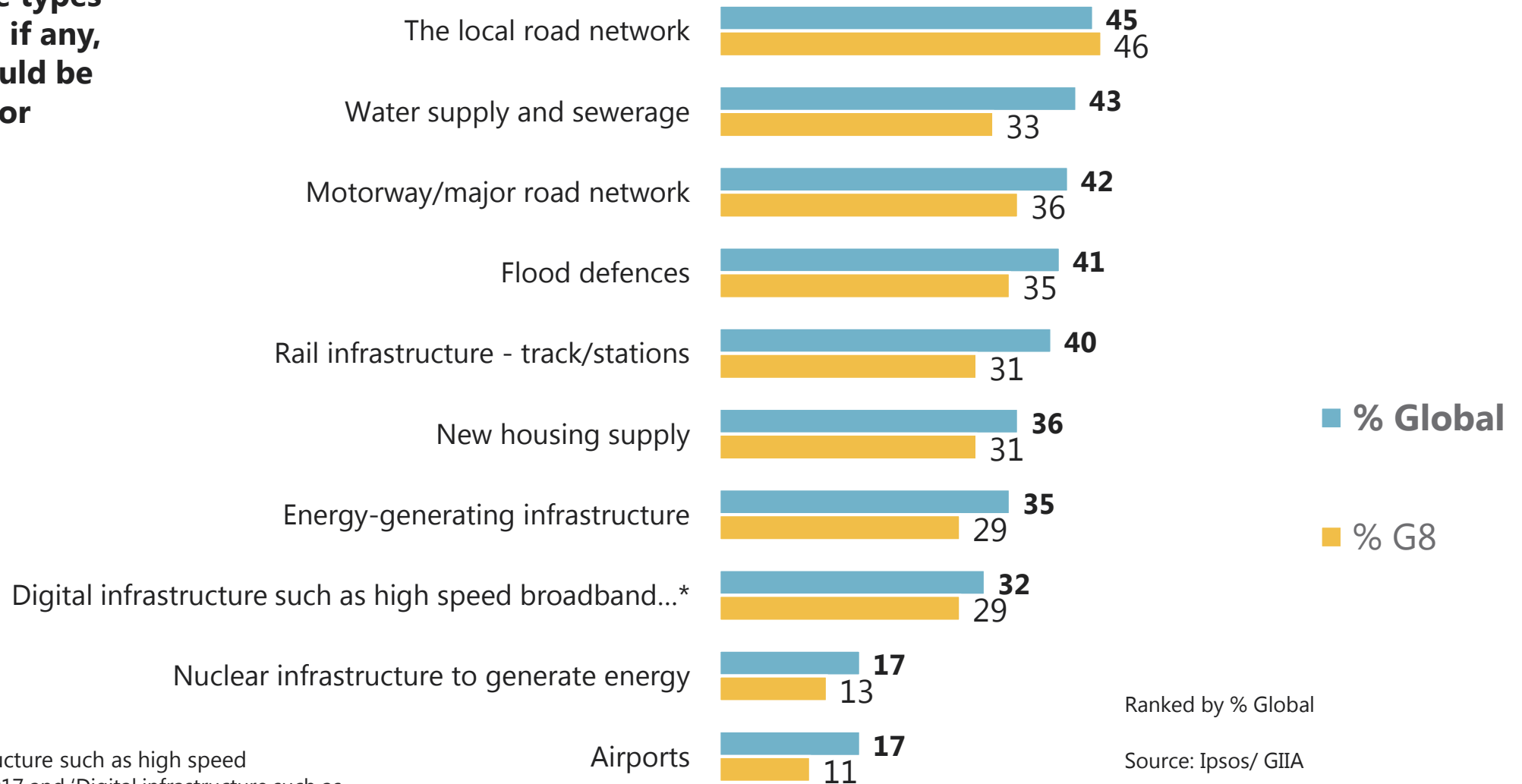
Ranked by % Global

* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

G8 – Sectors: Ratings v priority

% very/fairly good

% priority

- • **Airports**
- **Water** •
- **Digital** •
- • **Motorways**
- **Energy** •
- • **Rail**
- **Nuclear** •
- • **Housing**
- • **Local roads**
- • **Flood**

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Trends: Priorities – G8

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

Rail infrastructure - track/stations
- 31
- 29
- 30

New housing supply
- 31
- 33
- 34

The local road network
- 46
- 42
- 44

Motorway/major road network
- 36
- 31
- 34

Flood defences
- 35
- 36
- 39

Energy-generating infrastructure
- 29
- 34
- 32

Digital infrastructure - high speed broadband...*
- 29
- 28
- 29

Water supply and sewerage
- 33
- 33
- 31

Nuclear infrastructure to generate energy
- 13
- 14
- 14

Airports
- 11
- 12
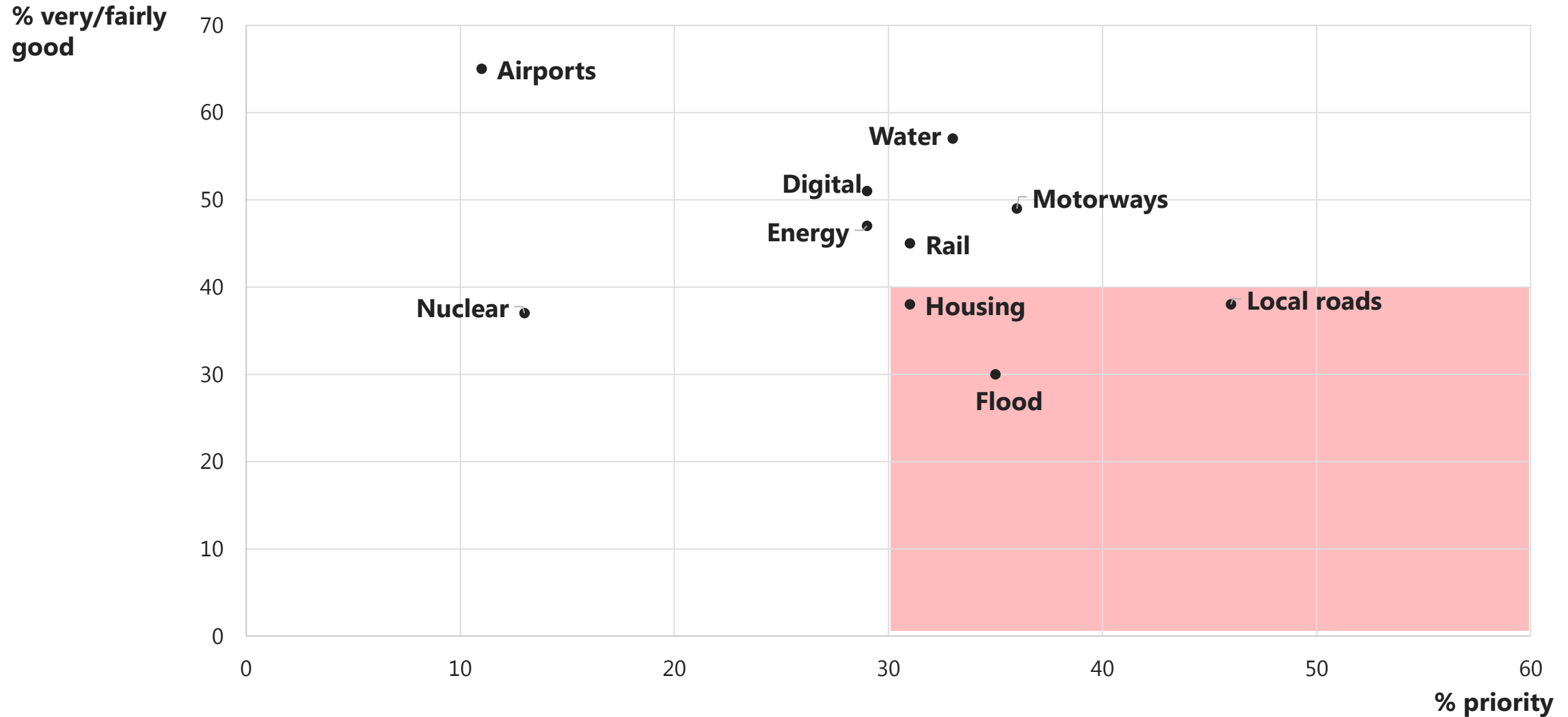- 14

■ G8 2018
□ G8 2017
□ G8 2016

Ranked by % 2018

* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018

Source: Ipsos/ GIIA

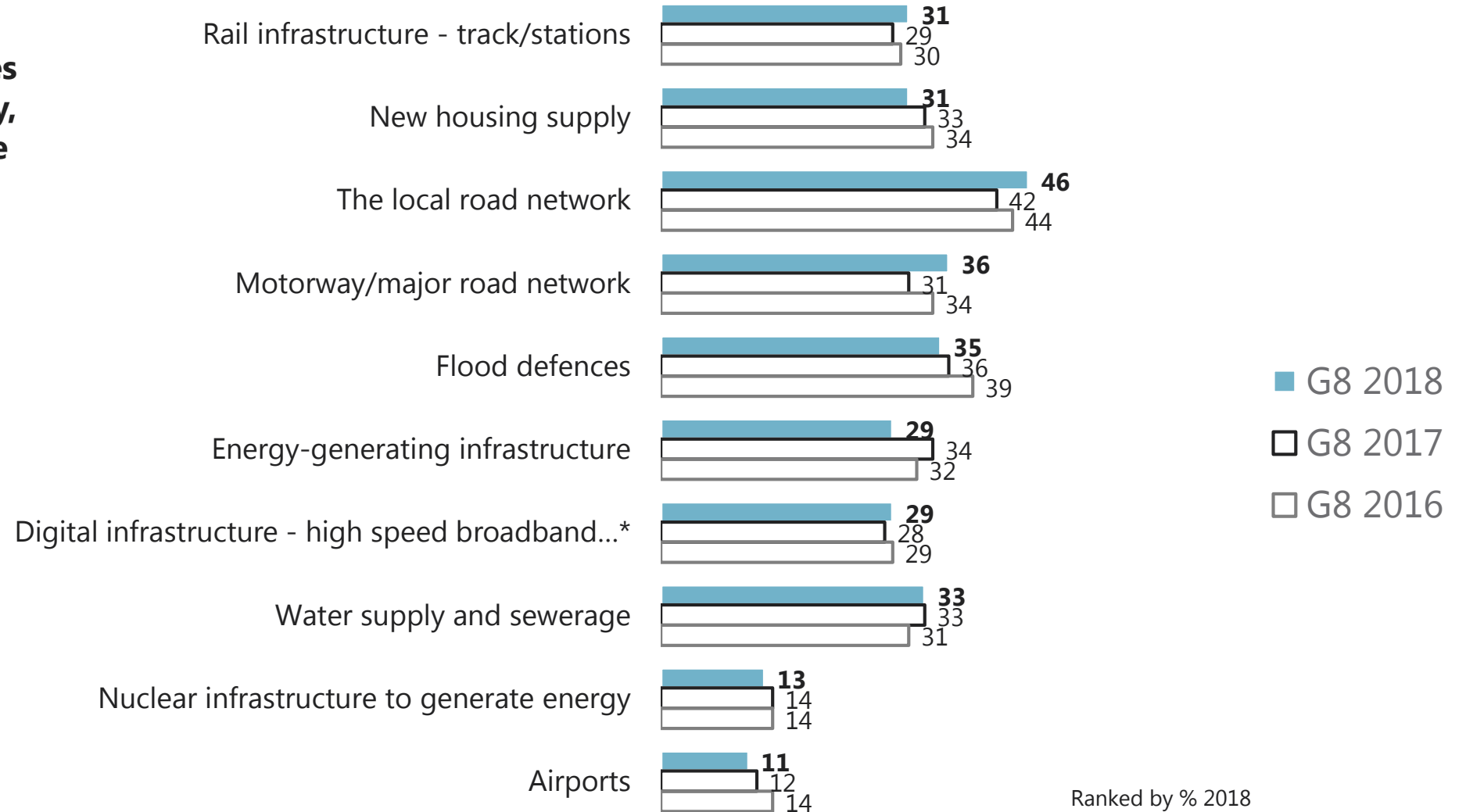Base: 19,786 adults (online), Aug-Sept 2018

Trends: Priorities – G8

% priority

Legend:
- Airports
- Motorways/major roads
- Local road network
- Rail infrastructure
- New housing supply
- Flood defences
- Energy generation
- Nuclear
- Digital
- Water supply and sewerage

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018
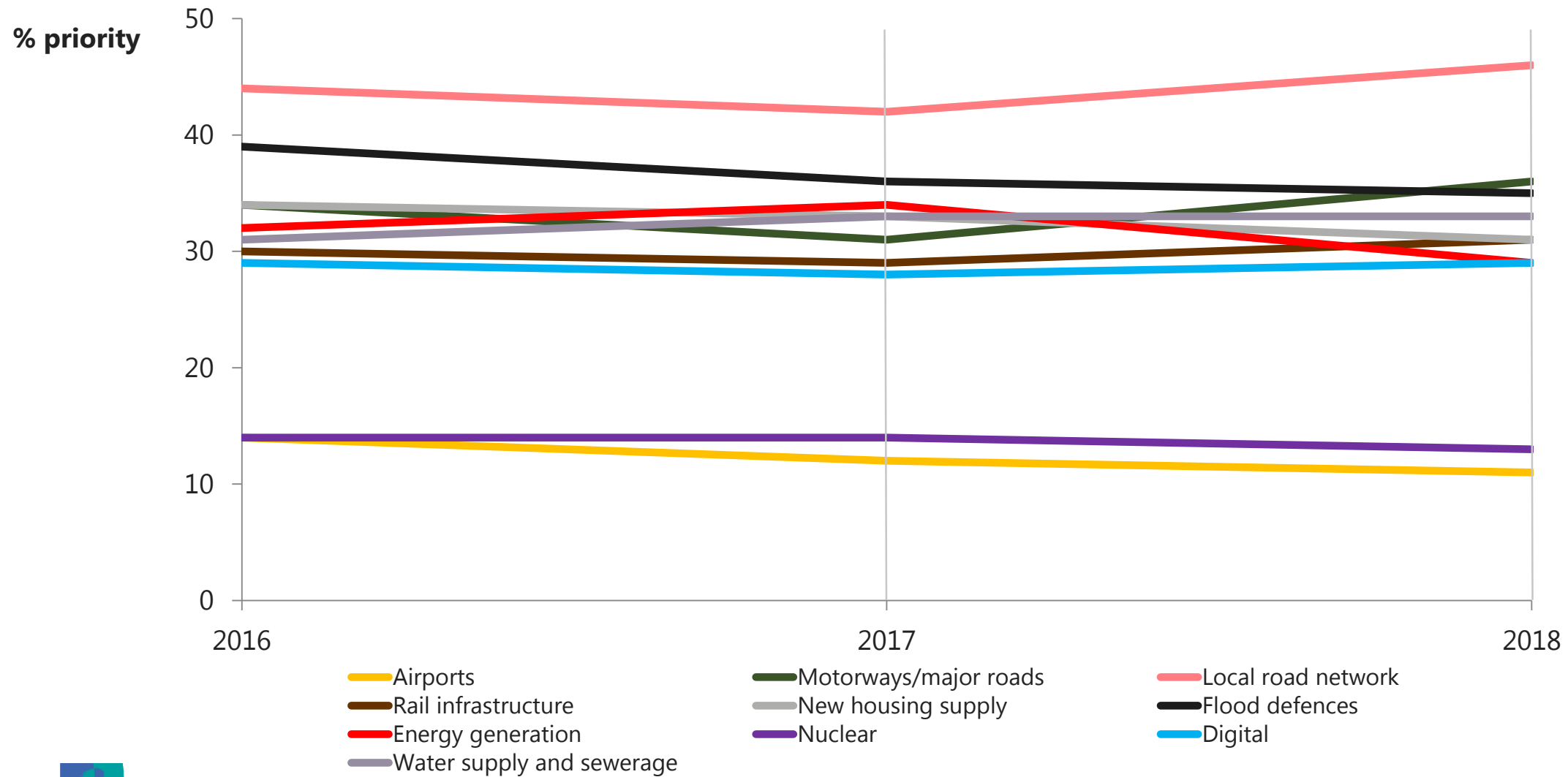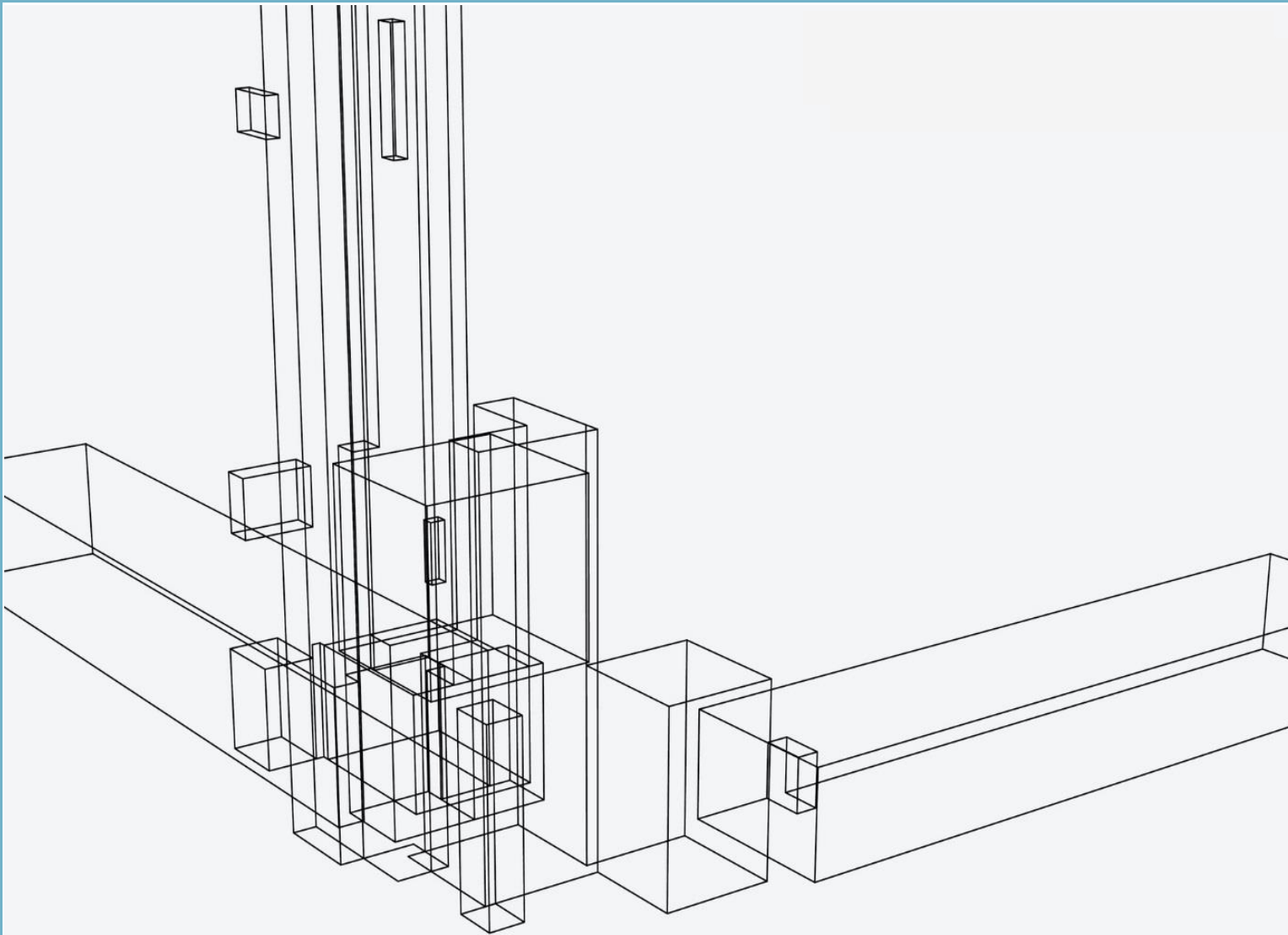
Attitudes

Global: Attitudes

Q. To what extent do you agree or disagree...?

■ % Strongly/tend to agree   ■ % Strongly/tend to disagree

Investing in infrastructure is vital to [COUNTRY]'s future economic growth
- 73
- 6

Local communities' views on plans for infrastructure should be heard properly, even if it means delays
- 64
- 9

As a country we don't do enough to involve people in decisions about which infrastructure to invest in
- 61
- 9

As a country we are not doing enough to meet our infrastructure needs
- 59
- 12

I'm fine with foreign investment in new infrastructure in [COUNTRY] if it means it gets built more quickly
- 49
- 19

My local area gets its fair share of [COUNTRY]'s investment in infrastructure
- 29
- 31

Ranked by % strongly/tend to agree

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Ipsos

G8: Attitudes

Q. To what extent do you agree or disagree…?

■ % Strongly/tend to agree   ■ % Strongly/tend to disagree

Investing in infrastructure is vital to [COUNTRY]'s future economic growth
69
4

Local communities' views on plans for infrastructure should be heard properly, even if it means delays
61
7

As a country we don't do enough to involve people in decisions about which infrastructure to invest in
55
8

As a country we are not doing enough to meet our infrastructure needs
53
9

I'm fine with foreign investment in new infrastructure in [COUNTRY] if it means it gets built more quickly
39
21

My local area gets its fair share of [COUNTRY]'s investment in infrastructure
25
27

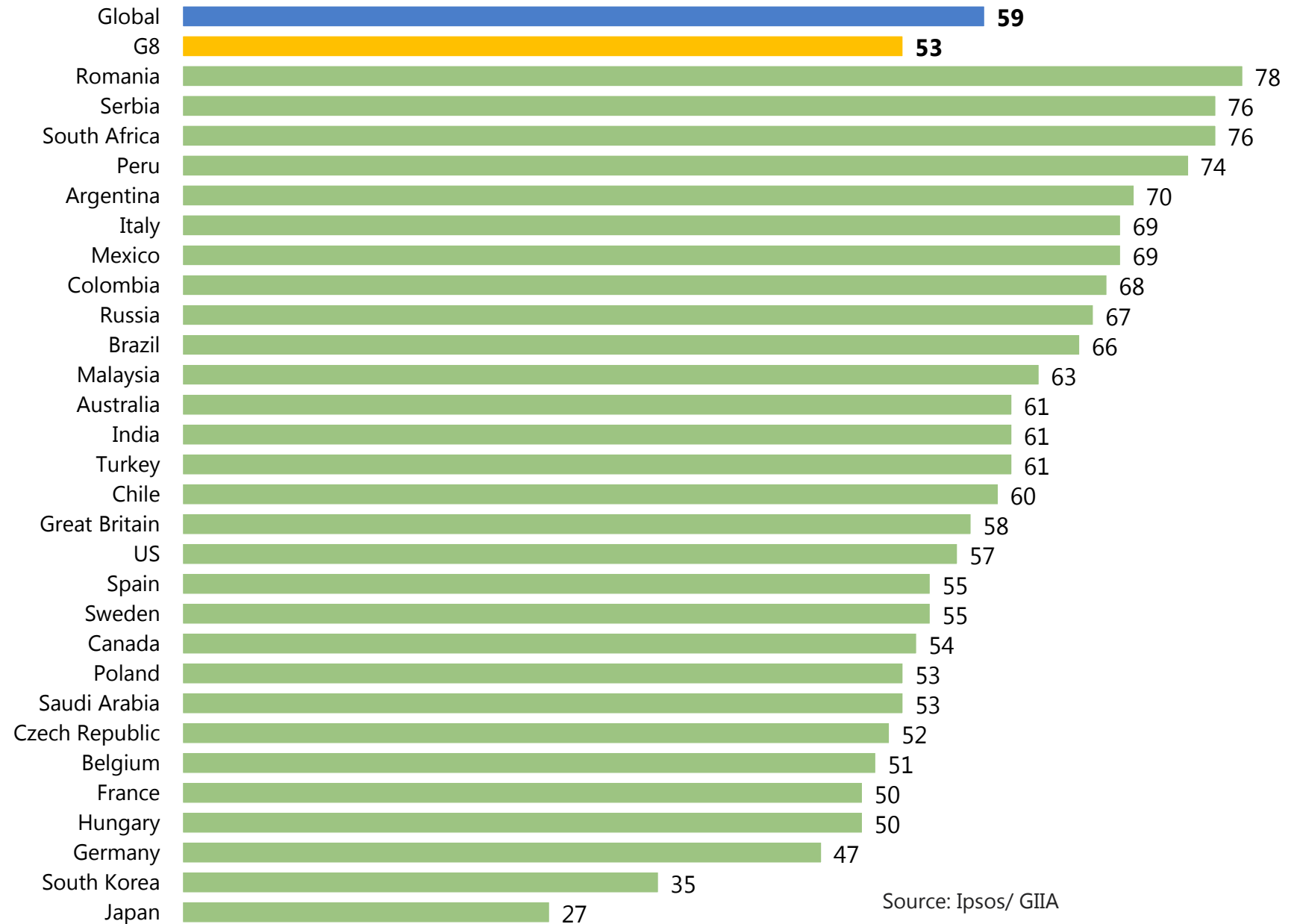Ranked by % strongly/tend to agree (global)

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Doing enough?

Q. To what extent do you agree or disagree...?

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

% strongly/tend to agree

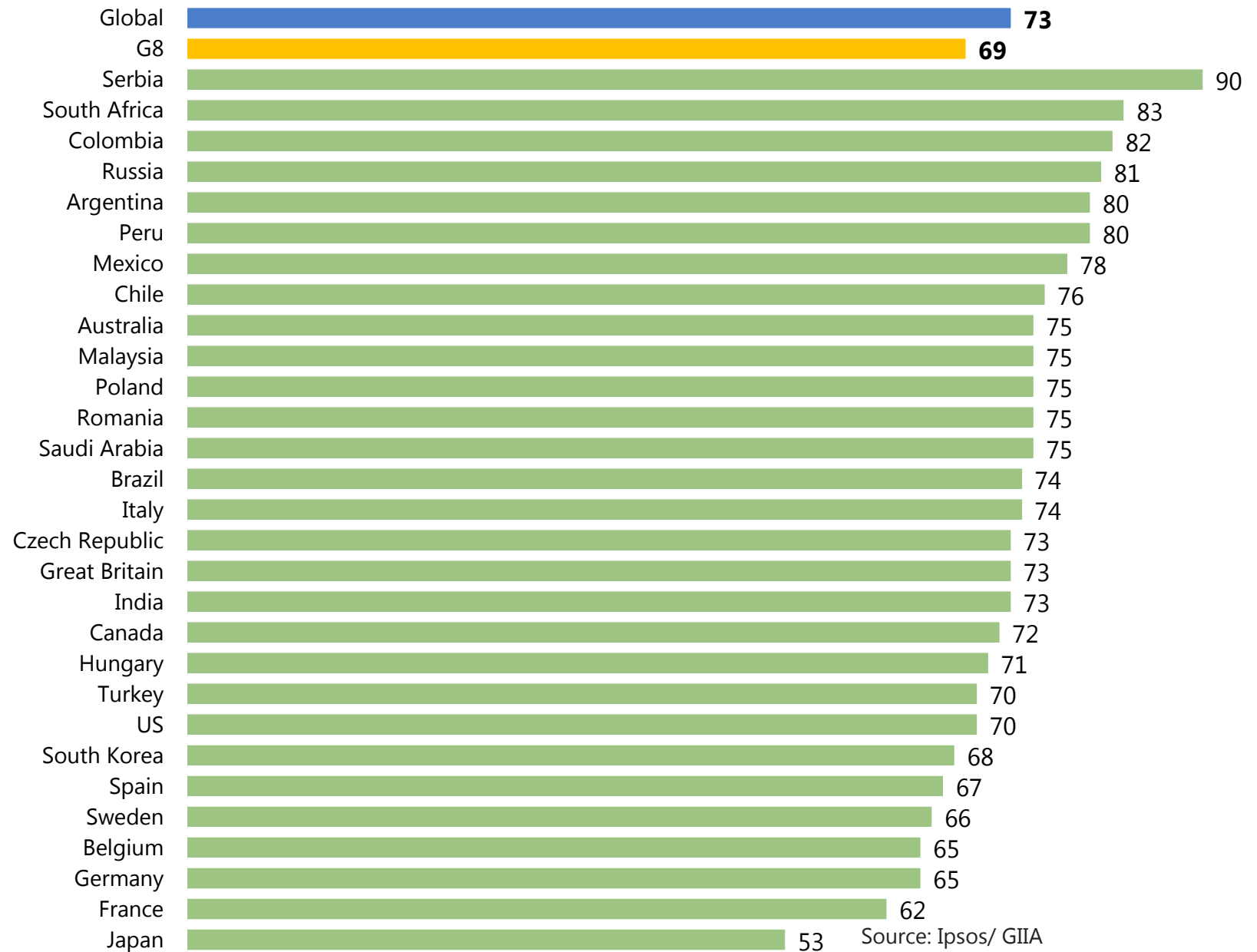|	
Global	59
G8	53
Romania	78
Serbia	76
South Africa	76
Peru	74
Argentina	70
Italy	69
Mexico	69
Colombia	68
Russia	67
Brazil	66
Malaysia	63
Australia	61
India	61
Turkey	61
Chile	60
Great Britain	58
US	57
Spain	55
Sweden	55
Canada	54
Poland	53
Saudi Arabia	53
Czech Republic	52
Belgium	51
France	50
Hungary	50
Germany	47
South Korea	35
Japan	27

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Ipsos

Investment vital

Q. To what extent do you agree or disagree...?

Investing in infrastructure is vital to [COUNTRY]'s future economic growth

% strongly/tend to agree

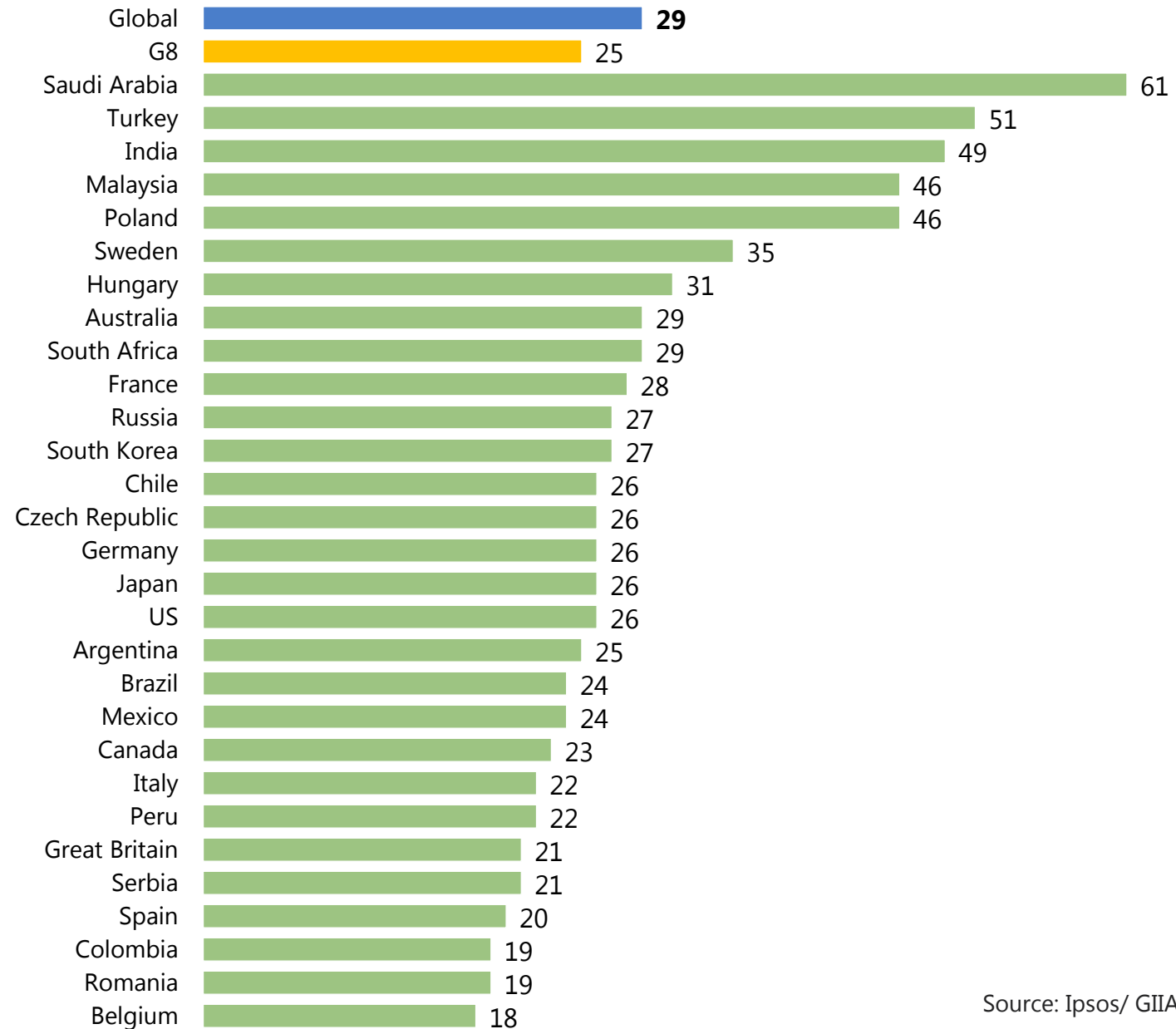| Country	Value
Global	73
G8	69
Serbia	90
South Africa	83
Colombia	82
Russia	81
Argentina	80
Peru	80
Mexico	78
Chile	76
Australia	75
Malaysia	75
Poland	75
Romania	75
Saudi Arabia	75
Brazil	74
Italy	74
Czech Republic	73
Great Britain	73
India	73
Canada	72
Hungary	71
Turkey	70
US	70
South Korea	68
Spain	67
Sweden	66
Belgium	65
Germany	65
France	62
Japan	53

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Fair share

Q. To what extent do you agree or disagree…?

My local area gets its fair share of [COUNTRY]'s investment in infrastructure
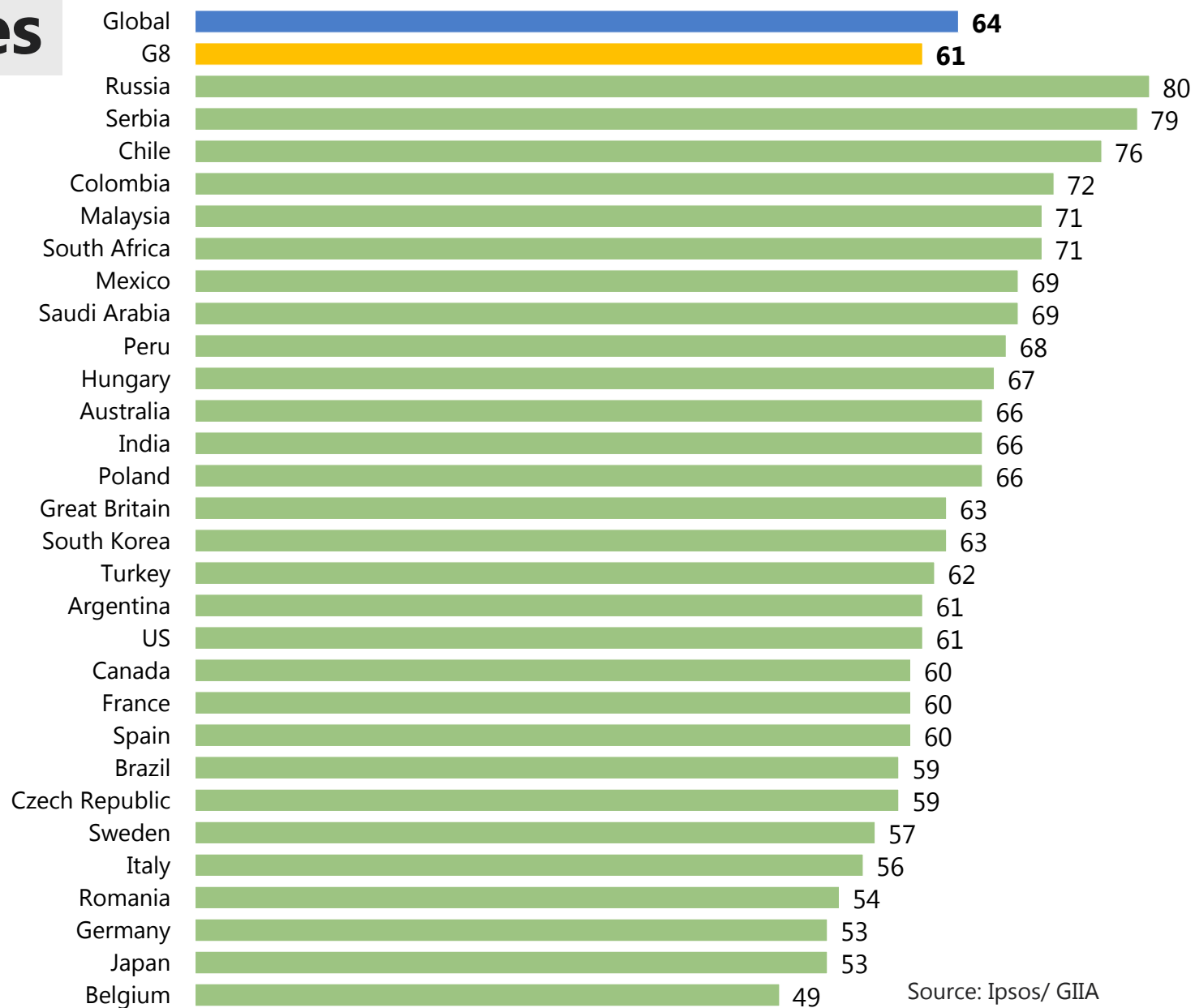
% strongly/tend to agree

Global	29
G8	25
Saudi Arabia	61
Turkey	51
India	49
Malaysia	46
Poland	46
Sweden	35
Hungary	31
Australia	29
South Africa	29
France	28
Russia	27
South Korea	27
Chile	26
Czech Republic	26
Germany	26
Japan	26
US	26
Argentina	25
Brazil	24
Mexico	24
Canada	23
Italy	22
Peru	22
Great Britain	21
Serbia	21
Spain	20
Colombia	19
Romania	19
Belgium	18

Local communities

Q. To what extent do you agree or disagree...?

Local communities' views on plans for infrastructure should be heard properly, even if it means delays
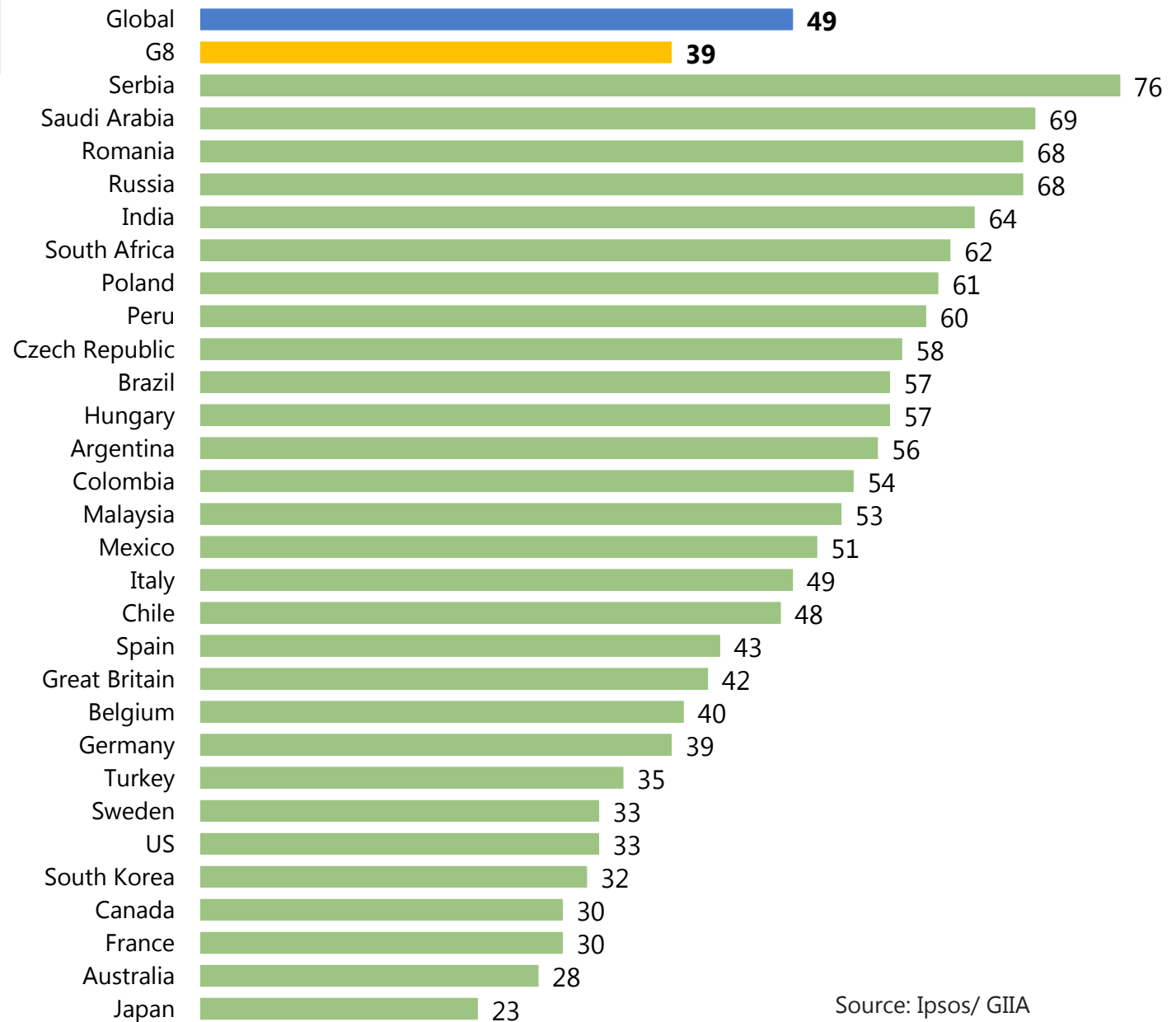
% strongly/tend to agree

Country	Value
Global	64
G8	61
Russia	80
Serbia	79
Chile	76
Colombia	72
Malaysia	71
South Africa	71
Mexico	69
Saudi Arabia	69
Peru	68
Hungary	67
Australia	66
India	66
Poland	66
Great Britain	63
South Korea	63
Turkey	62
Argentina	61
US	61
Canada	60
France	60
Spain	60
Brazil	59
Czech Republic	59
Sweden	57
Italy	56
Romania	54
Germany	53
Japan	53
Belgium	49

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018

Ipsos

Foreign investment

Q. To what extent do you agree or disagree...?

I'm fine with foreign investment in new infrastructure in [COUNTRY] if it means it gets built more quickly
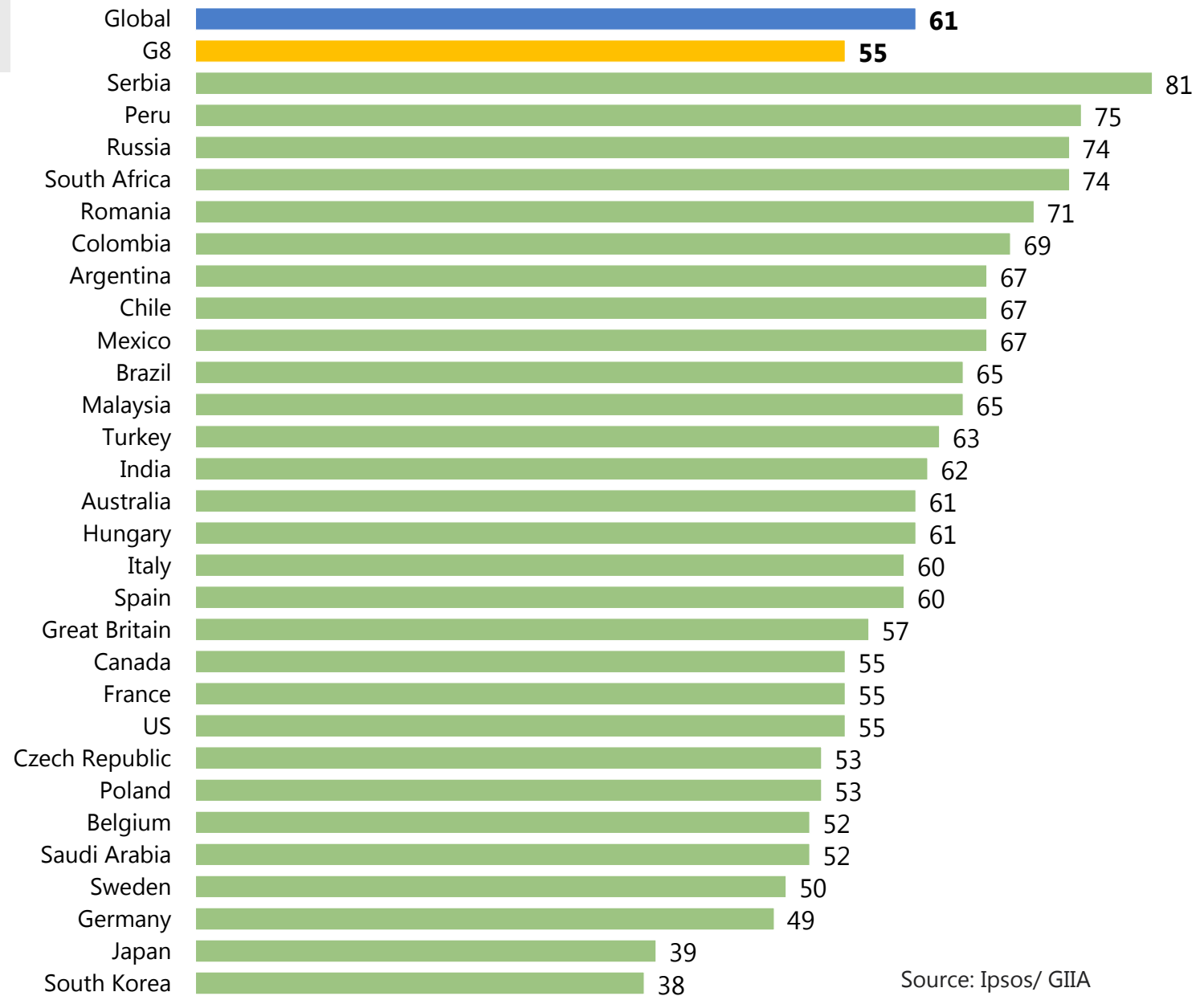
% strongly/tend to agree

Country	Value
Global	49
G8	39
Serbia	76
Saudi Arabia	69
Romania	68
Russia	68
India	64
South Africa	62
Poland	61
Peru	60
Czech Republic	58
Brazil	57
Hungary	57
Argentina	56
Colombia	54
Malaysia	53
Mexico	51
Italy	49
Chile	48
Spain	43
Great Britain	42
Belgium	40
Germany	39
Turkey	35
Sweden	33
US	33
South Korea	32
Canada	30
France	30
Australia	28
Japan	23

Source: Ipsos/ GIIA

Base: 19,786 adults (online), Aug-Sept 2018
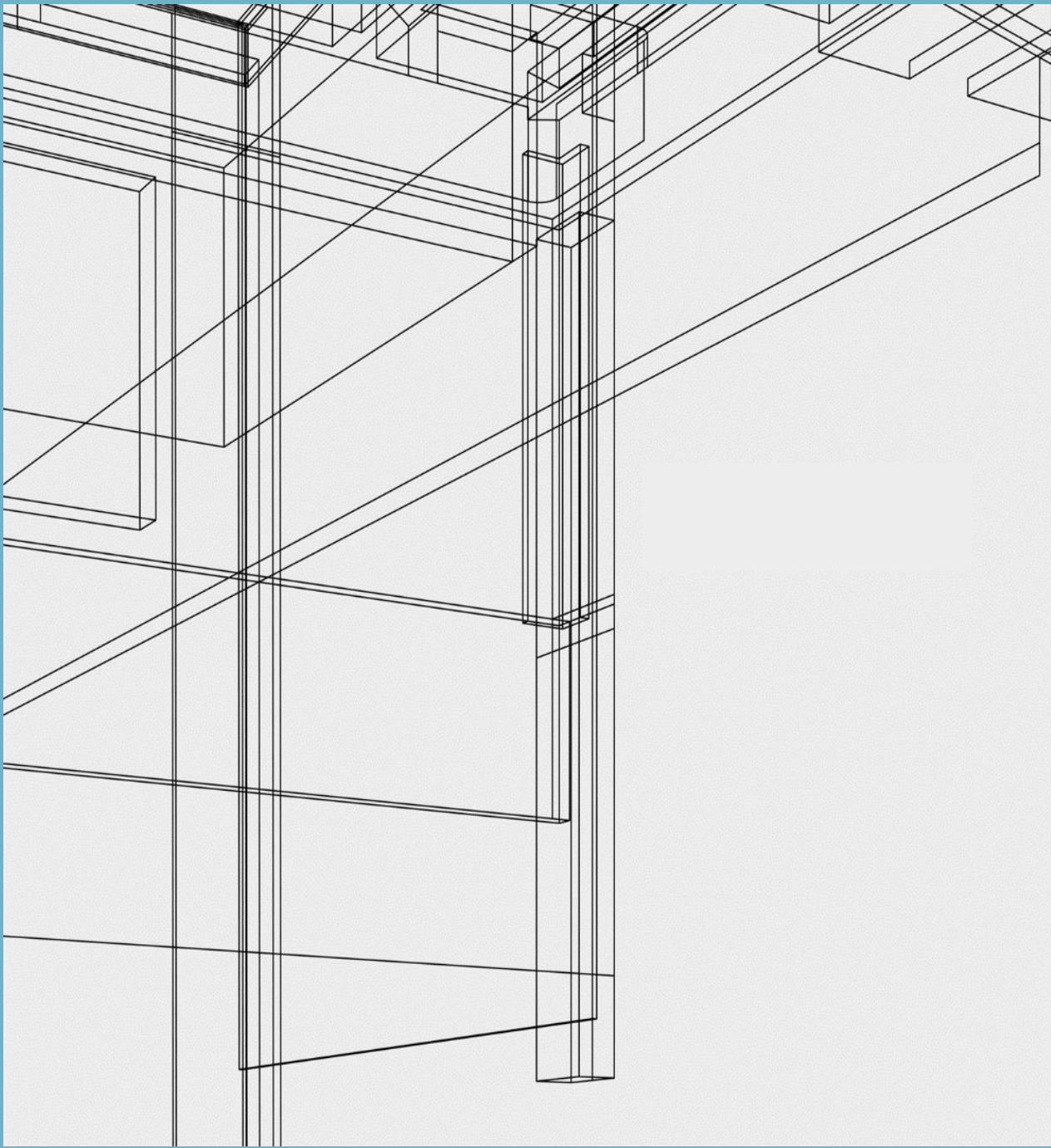
Ipsos

Involving people

Q. To what extent do you agree or disagree…?

As a country we don't do enough to involve people in decisions about which infrastructure to invest in

% strongly/tend to agree

Country	Value
Global	61
G8	55
Serbia	81
Peru	75
Russia	74
South Africa	74
Romania	71
Colombia	69
Argentina	67
Chile	67
Mexico	67
Brazil	65
Malaysia	65
Turkey	63
India	62
Australia	61
Hungary	61
Italy	60
Spain	60
Great Britain	57
Canada	55
France	55
US	55
Czech Republic	53
Poland	53
Belgium	52
Saudi Arabia	52
Sweden	50
Germany	49
Japan	39
South Korea	38

Ipsos

Key findings

Key findings

- Globally, overall ratings of infrastructure split approximately one third positive, one third negative, and one third neutral or don't know.

- This varies by region; e.g. there is a net *negative* margin of 11 percentage points in Europe but a *positive* one of 18 points in the APAC region.

- Satisfaction is on a downward trajectory among the G8 and European countries included in the survey.

- Several sectors are prioritised fairly equally by publics across 28 countries with the local road network top by a small 2 point margin above water supply and sewerage (45% and 43% respectively).

- Among sectors, airports are the most positively rated with flood defences and nuclear energy rated most negatively (29% are neutral on the latter – the highest for any sector).

- There is a strongly held conviction that infrastructure is vital to future economic growth but also a sense that people are insufficiently involved in decision-making and that areas do not get equitable returns from investment.
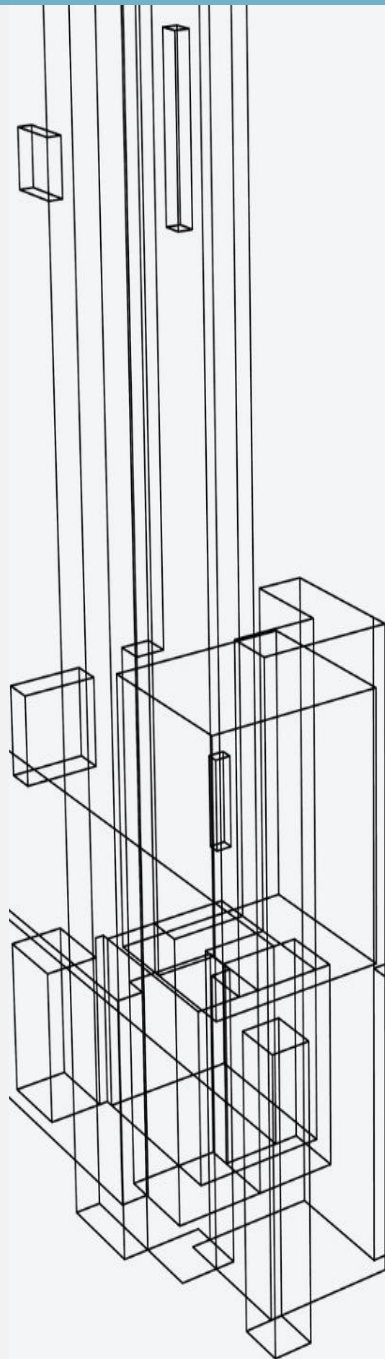
- Compared to the global average, publics across the G8 are relatively more positive about rail, flood defences and energy-generation, nuclear and water supply and sewerage.

- They are less positive about digital infrastructure, new housing supply, local roads and motorways.

- Most of the G8 countries are performing worse in terms of overall satisfaction than ratings of individual sectors. Some are performing as well or better than others despite having similar GCI (infrastructure) ratings.

- The stand-out priority is the local road network, chosen by 45% (motorways is the next highest at 36%). This has been the top G8 priority since 2016.

- G8 citizens are strongly of the view that infrastructure is vital to future economic growth but a majority think that their country is not doing enough to meet infrastructure needs.

- Publics are less sure that people are sufficiently involved in decision-making and that areas do get equitable returns from investment.

Further information

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