GLOBAL INFRASTRUCTURE INDEX

Public satisfaction and priorities – 2020

https://www.ipsos.com/en/global-infrastructure-index-2020

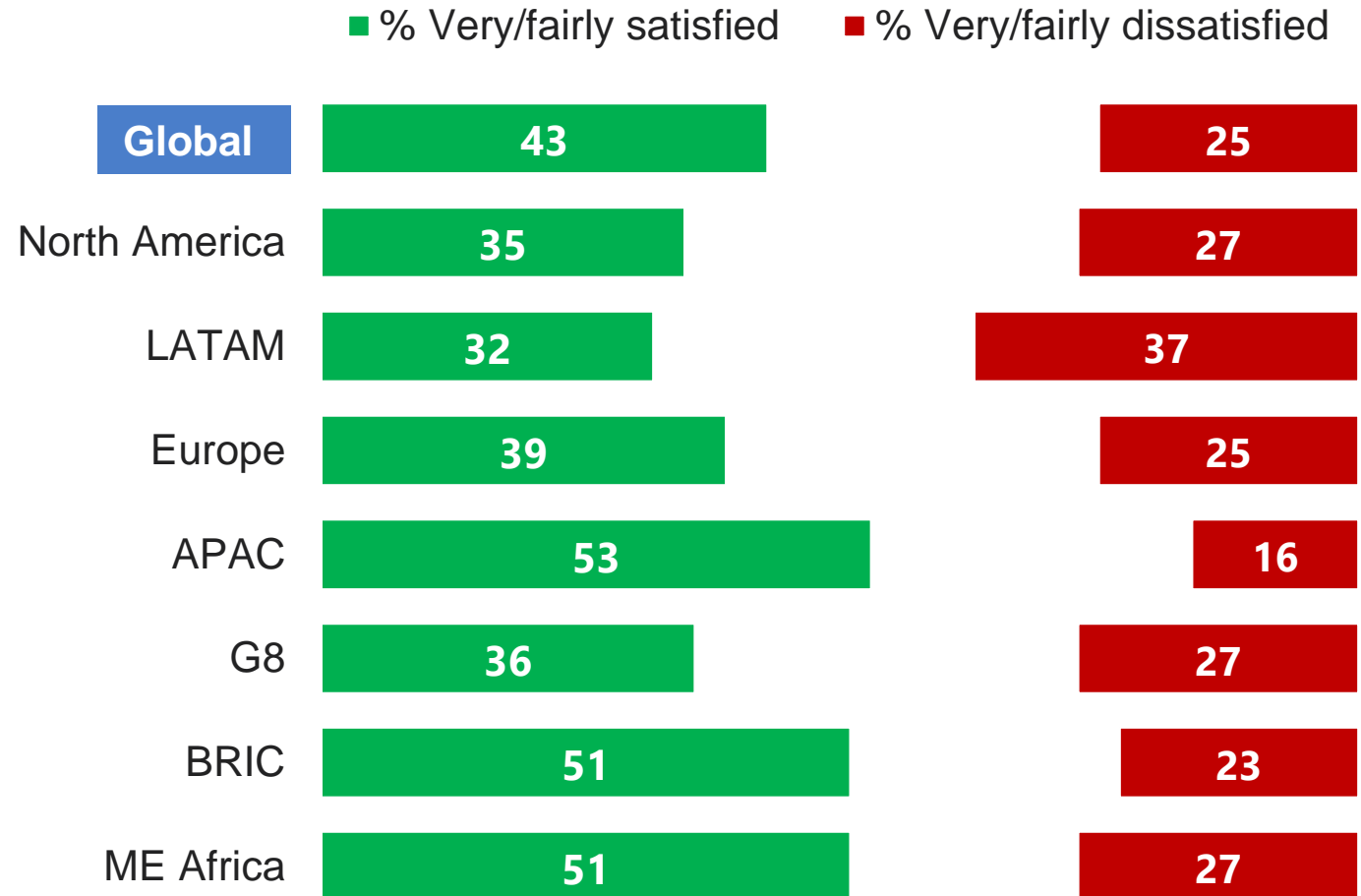GIIA Global Infrastructure Investor Association

GAME CHANGERS

Ipsos

These are the findings of the **fifth Global Infrastructure Index** conducted between
24 July – 7 August 2020 in **27 countries** around the world via the Ipsos Online Panel system and involving **19,516** participants.

Ipsos

2020 RATINGS ARE LOWER THAN THE GLOBAL AVERAGE WITH DISSATISFACTION HIGHER THAN AVERAGE ACROSS G8 AND EUROPEAN 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?

See **slide 18** for regional classifications

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

	% Very/fairly satisfied	% Very/fairly dissatisfied
Global	43	25
North America	35	27
LATAM	32	37
Europe	39	25
APAC	53	16
G8	36	27
BRIC	51	23
ME Africa	51	27

Source: Ipsos/GIIA

Base: 19,516 adults (online), July-August 2020

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VS 2019: SHARPEST IMPROVEMENTS IN BRIC AND ME AFRICA, WITH POSITIVE RATINGS UP GLOBALLY BY 6 POINTS YEAR-ON-YEAR

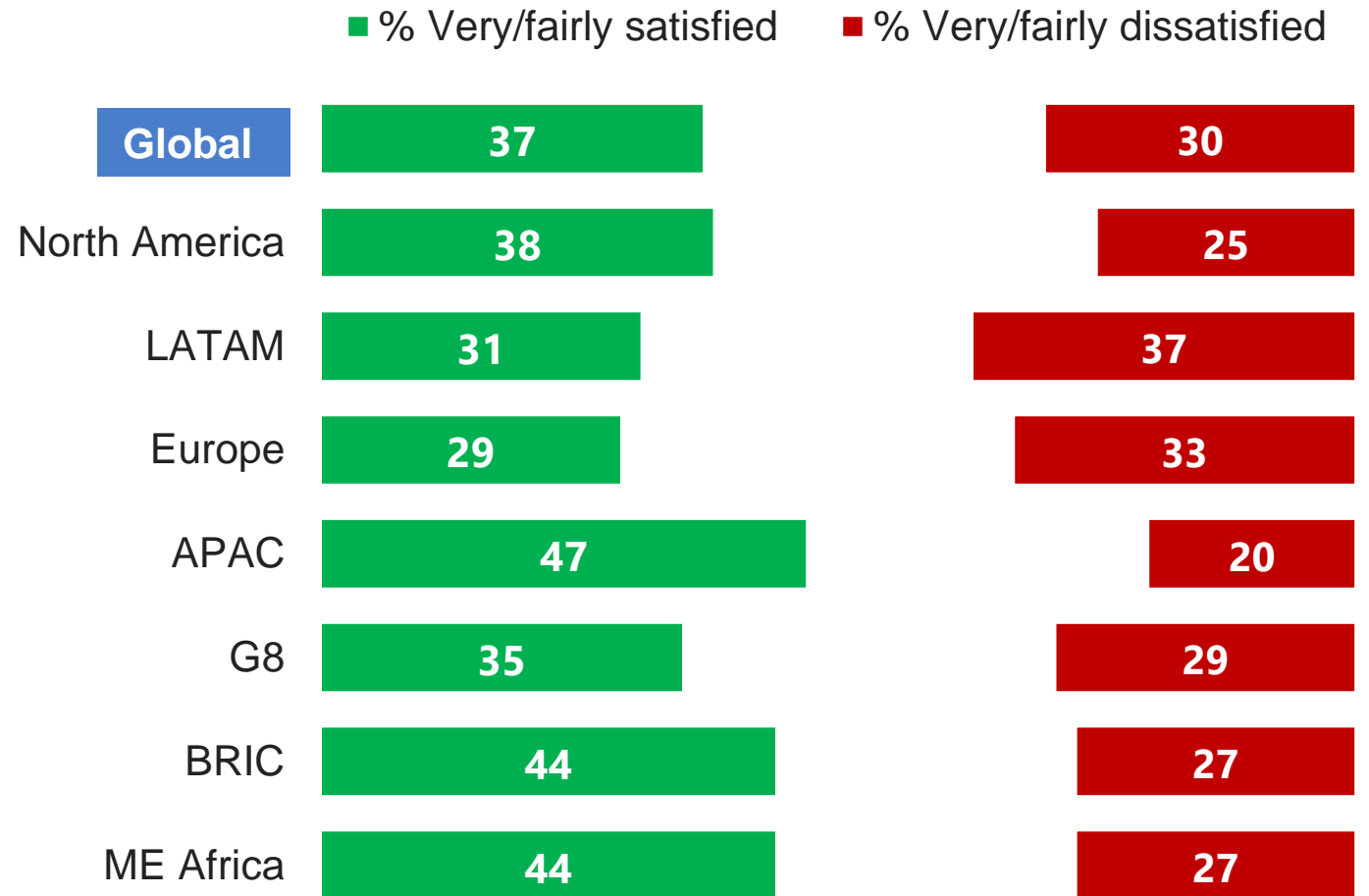Q. We now want you to think about [COUNTRY'S] infrastructure.

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?

N.B. the 2016-20 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.

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

Region	% Very/fairly satisfied	% Very/fairly dissatisfied
Global	37	30
North America	38	25
LATAM	31	37
Europe	29	33
APAC	47	20
G8	35	29
BRIC	44	27
ME Africa	44	27

Source: Ipsos/GIIA

Base: 19,516 adults (online), July-August 2019

SATISFACTION LEVELS DIPPED IN 2018

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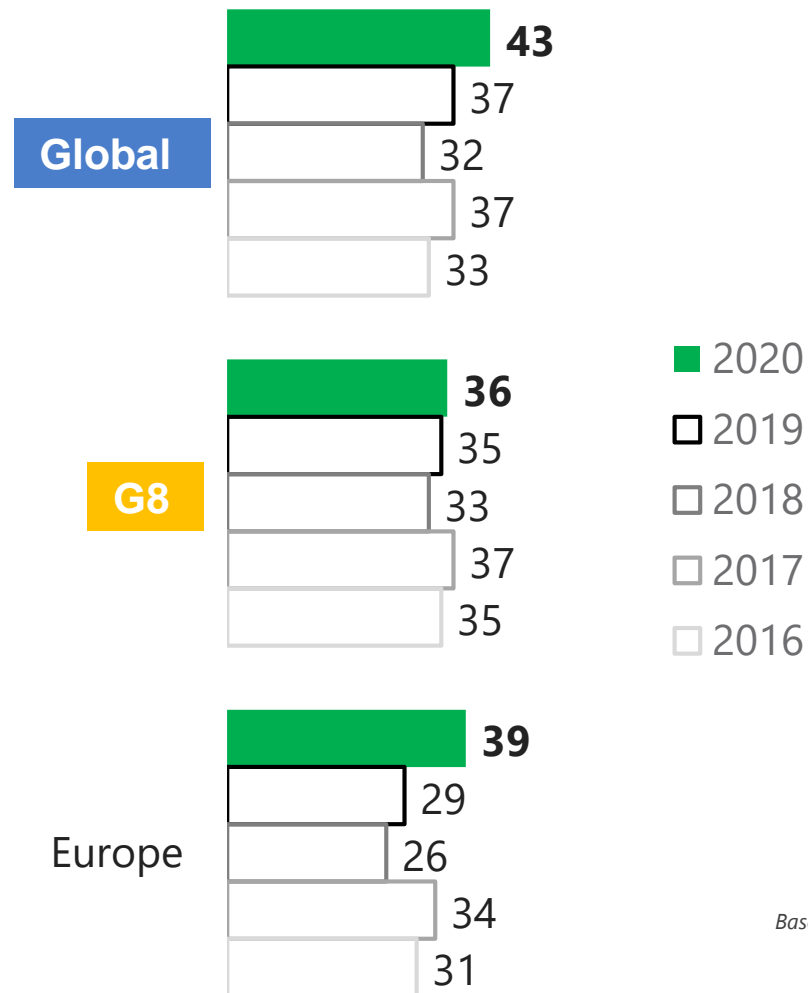
Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure?

N.B. the 2016-20 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.

% very/fairly satisfied

Global
- 2020: **43**
- 2019: 37
- 2018: 32
- 2017: 37
- 2016: 33

G8
- 2020: **36**
- 2019: 35
- 2018: 33
- 2017: 37
- 2016: 35

Europe
- 2020: **39**
- 2019: 29
- 2018: 26
- 2017: 34
- 2016: 31

- 🟩 2020
- ⬜ 2019
- ⬜ 2018
- ⬜ 2017
- ⬜ 2016

Source: Ipsos/GIIA

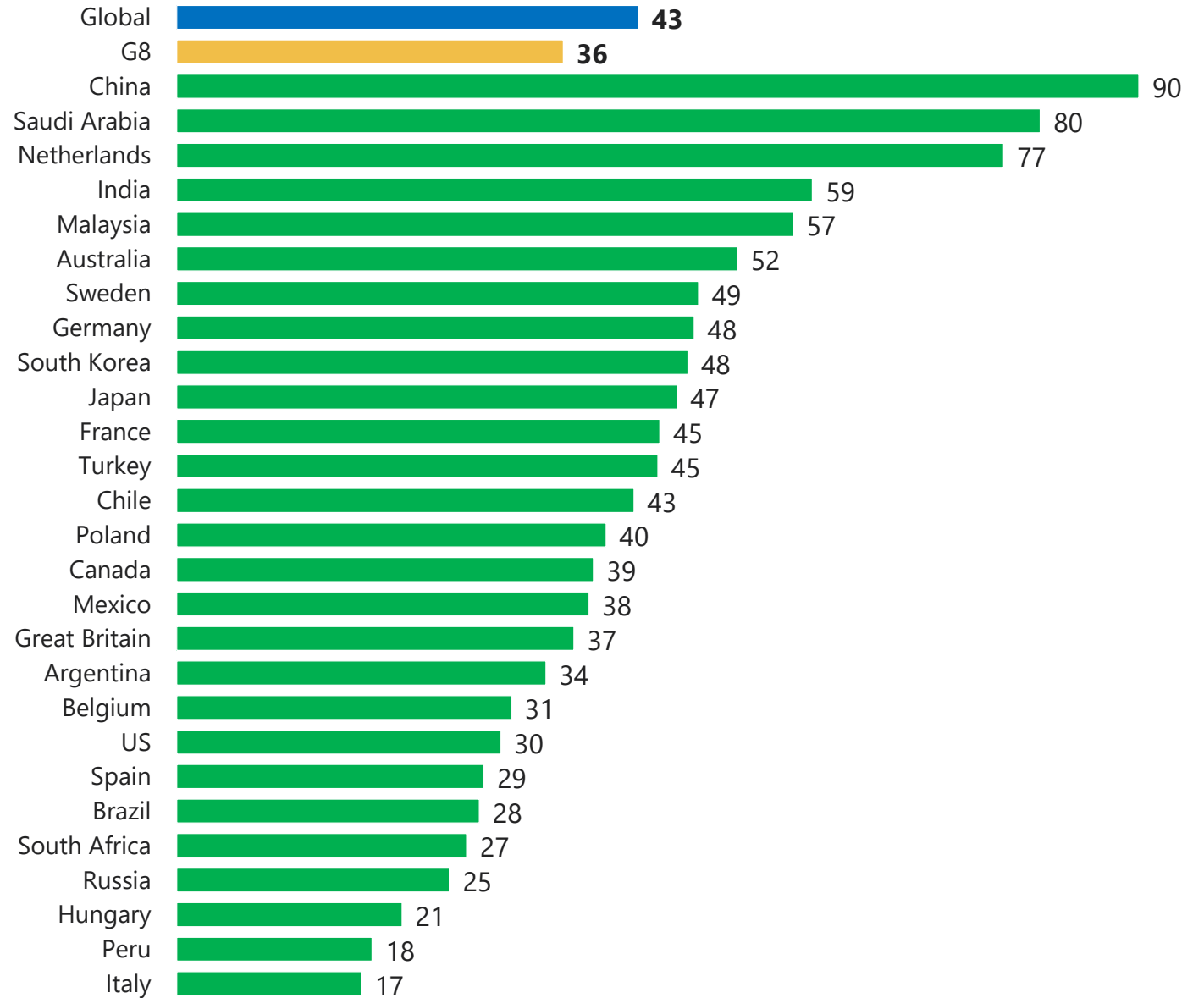*Base: 19,516 adults (online), July-August 2020*

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OVERALL RATINGS

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?

% very/fairly satisfied

Country	Rating
Global	43
G8	36
China	90
Saudi Arabia	80
Netherlands	77
India	59
Malaysia	57
Australia	52
Sweden	49
Germany	48
South Korea	48
Japan	47
France	45
Turkey	45
Chile	43
Poland	40
Canada	39
Mexico	38
Great Britain	37
Argentina	34
Belgium	31
US	30
Spain	29
Brazil	28
South Africa	27
Russia	25
Hungary	21
Peru	18
Italy	17

Source: Ipsos/GIIA

Base: 19,516 adults (online), July-August 2020

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COMPETITION FOR TOP PRIORITY STATUS

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

Infrastructure	% Global
Water supply and sewerage	42
Solar energy infrastructure	41
The local road network	34
New housing supply	34
Pavements, footpaths & pedestrian areas	34
Flood defences	33
Wind energy	33
Rail infrastructure - track/stations	32
Digital infrastructure such as high speed broadband…*	32
Motorway/major road network	31
Cycle route/lanes/facilities	26
Electric vehicle charging infrastructure	21
Airports	13
Nuclear infrastructure to generate energy	11

■ % Global

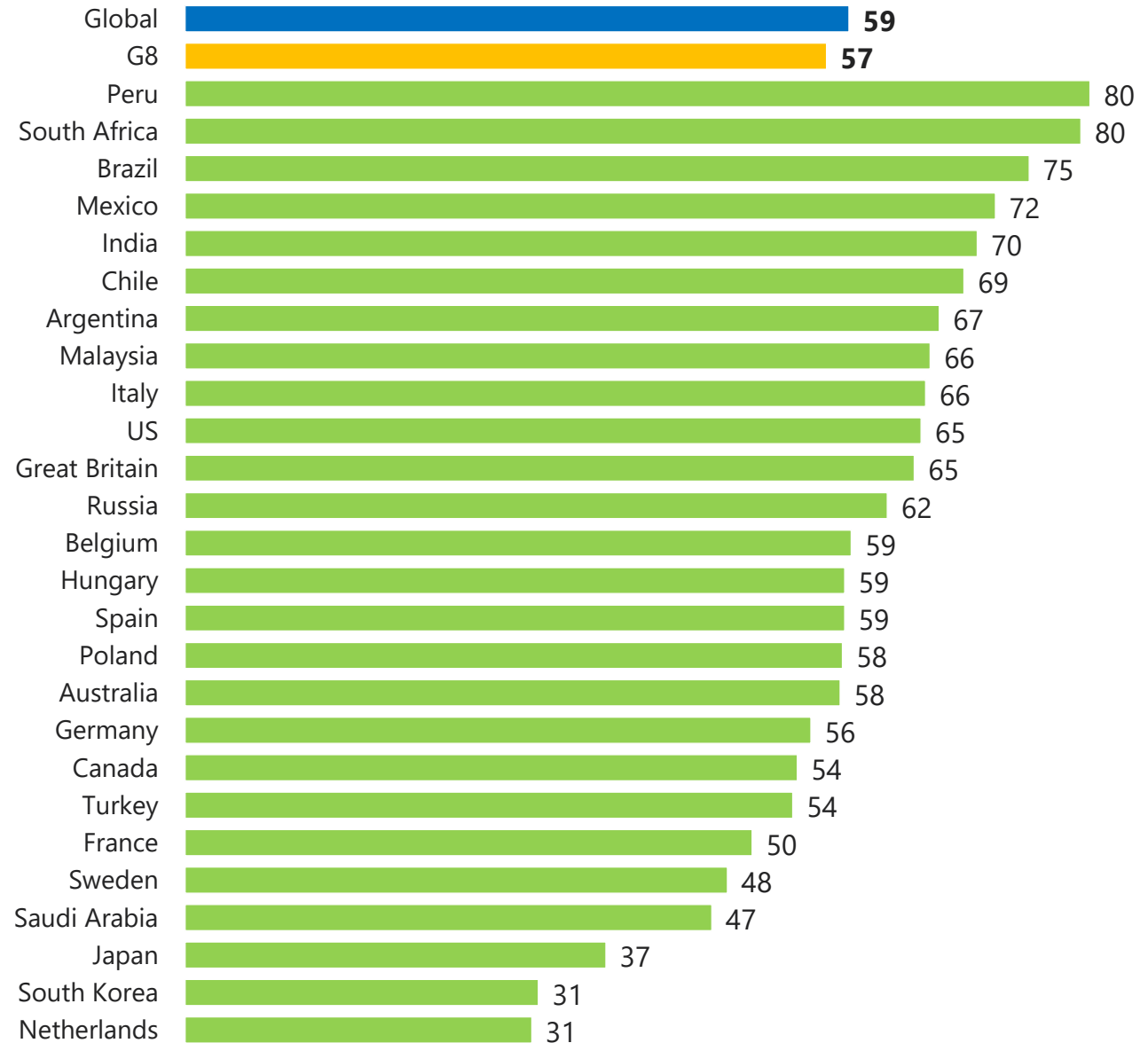*Base: 19,516 adults (online), July-August 2020*

MID-TABLE RANKING

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

% strongly/tend to agree

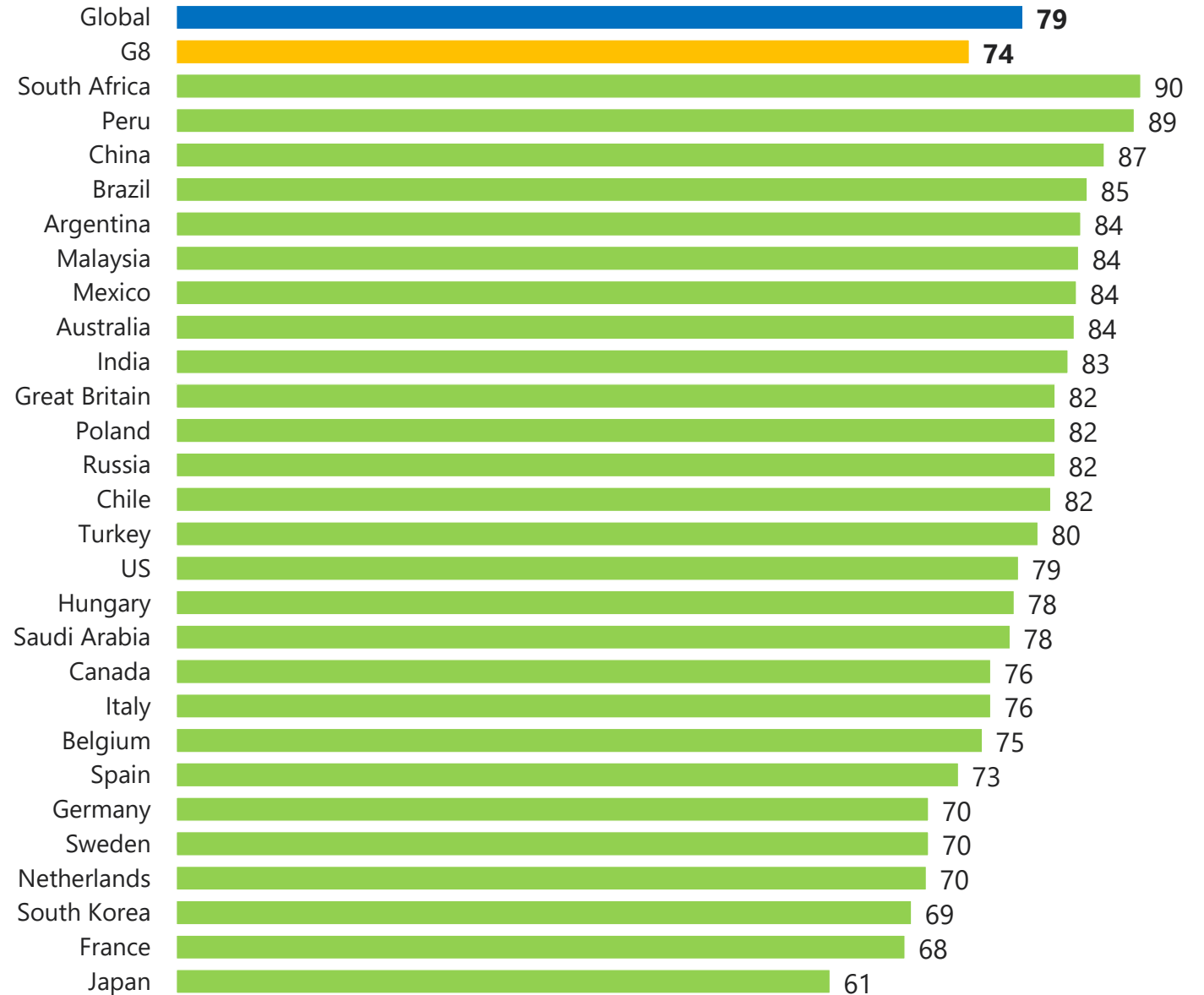|	
Global	59
G8	57
Peru	80
South Africa	80
Brazil	75
Mexico	72
India	70
Chile	69
Argentina	67
Malaysia	66
Italy	66
US	65
Great Britain	65
Russia	62
Belgium	59
Hungary	59
Spain	59
Poland	58
Australia	58
Germany	56
Canada	54
Turkey	54
France	50
Sweden	48
Saudi Arabia	47
Japan	37
South Korea	31
Netherlands	31

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MOST COUNTRIES AGREE

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 is vital to [COUNTRY'S] future economic growth

% strongly/tend to agree

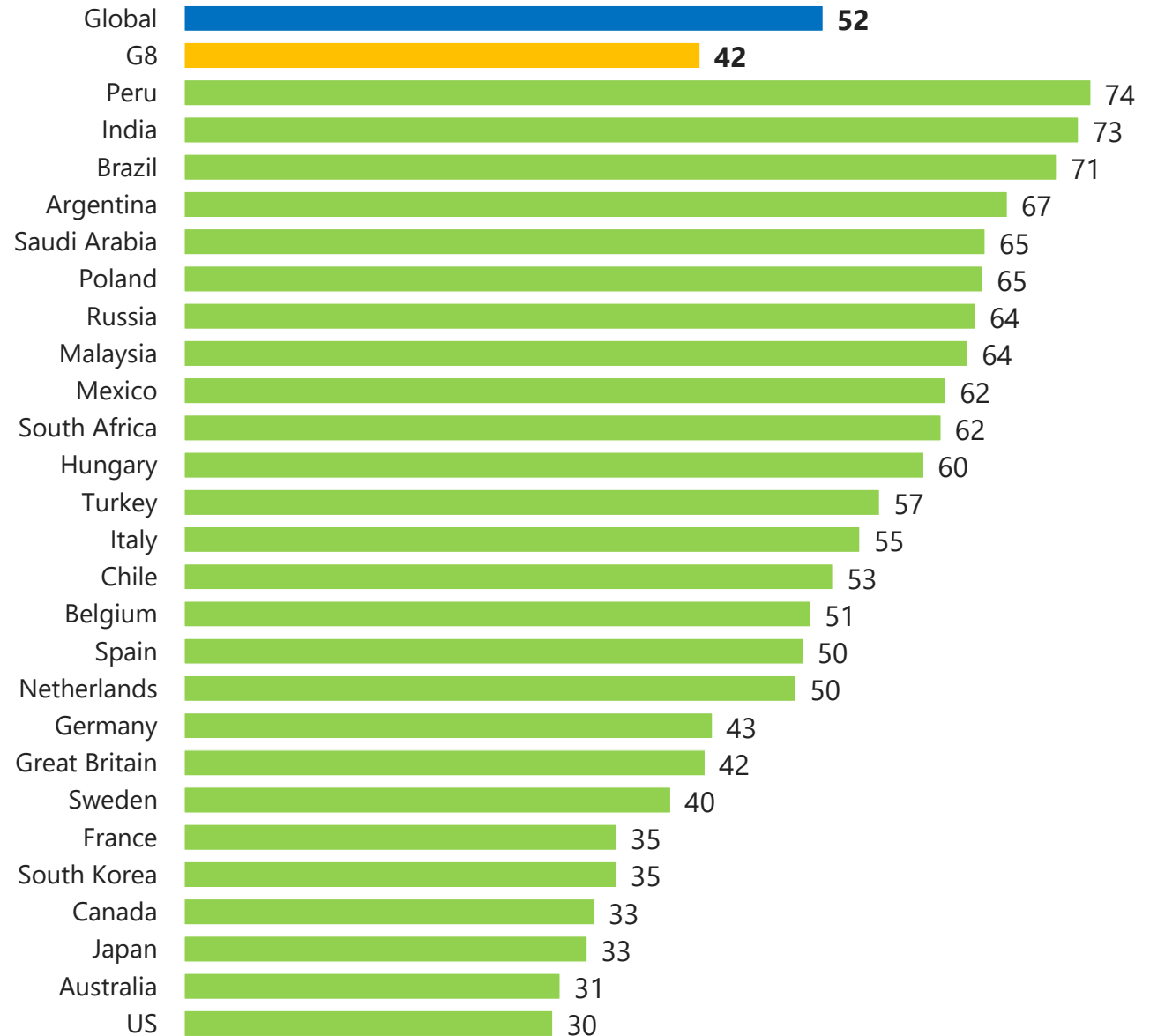| Country	%
Global	79
G8	74
South Africa	90
Peru	89
China	87
Brazil	85
Argentina	84
Malaysia	84
Mexico	84
Australia	84
India	83
Great Britain	82
Poland	82
Russia	82
Chile	82
Turkey	80
US	79
Hungary	78
Saudi Arabia	78
Canada	76
Italy	76
Belgium	75
Spain	73
Germany	70
Sweden	70
Netherlands	70
South Korea	69
France	68
Japan	61

Source: Ipsos/GIIA

Base: 19,516 adults (online), July-August 2020

OTHER G8 COUNTRIES ARE ALSO COOLER

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 foreign investment in new infrastructure in [COUNTRY] if it means it is better quality
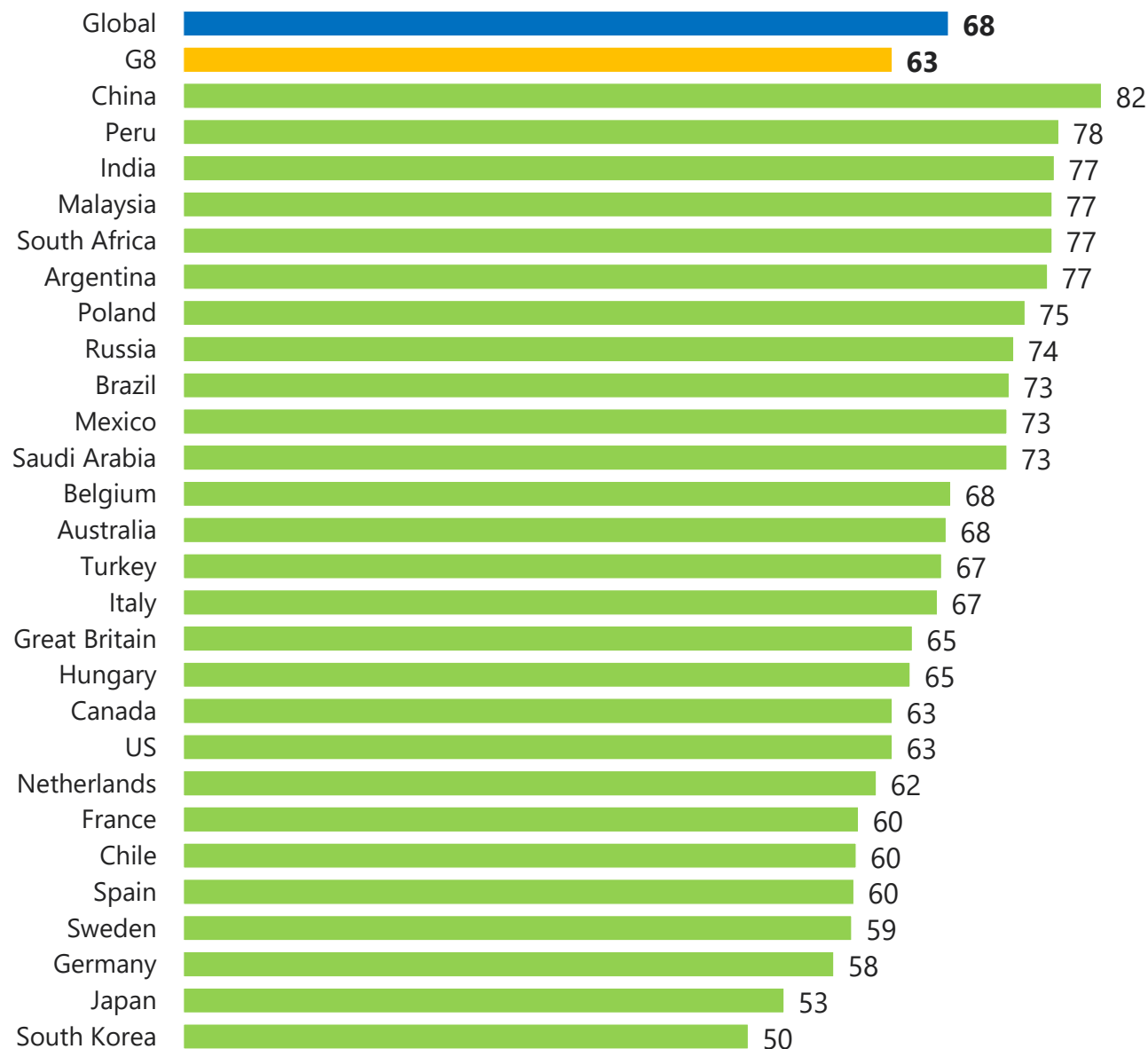
% strongly/tend to agree

Country	Value
Global	52
G8	42
Peru	74
India	73
Brazil	71
Argentina	67
Saudi Arabia	65
Poland	65
Russia	64
Malaysia	64
Mexico	62
South Africa	62
Hungary	60
Turkey	57
Italy	55
Chile	53
Belgium	51
Spain	50
Netherlands	50
Germany	43
Great Britain	42
Sweden	40
France	35
South Korea	35
Canada	33
Japan	33
Australia	31
US	30

Source: Ipsos/GIIA

Base: 19,516 adults (online), July-August 2020

Ipsos

SIMILAR TO G8 AVERAGE

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 businesses in the private sector investing money in infrastructure if it means [COUNTRY] gets the infrastructure it needs

% strongly/tend to agree

Global	68
G8	63
China	82
Peru	78
India	77
Malaysia	77
South Africa	77
Argentina	77
Poland	75
Russia	74
Brazil	73
Mexico	73
Saudi Arabia	73
Belgium	68
Australia	68
Turkey	67
Italy	67
Great Britain	65
Hungary	65
Canada	63
US	63
Netherlands	62
France	60
Chile	60
Spain	60
Sweden	59
Germany	58
Japan	53
South Korea	50

Source: Ipsos/GIIA

Base: 19,516 adults (online), July-August 2020
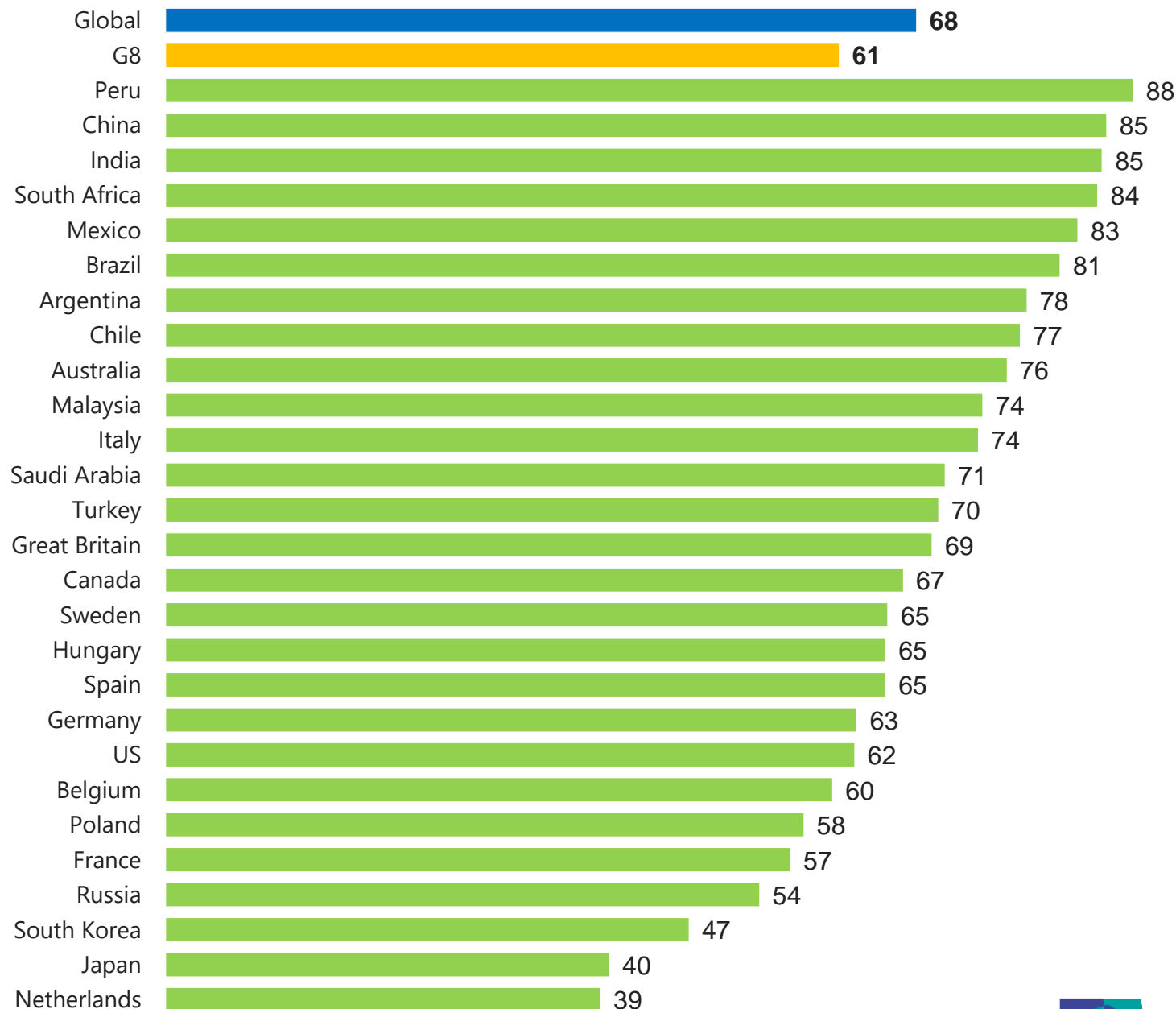
Ipsos

MORE SO IN BRITAIN THAN OTHER G8

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 expect my government to make investment in infrastructure a priority when planning for the post COVID-19 recovery

% strongly/tend to agree

Source: Ipsos/GIIA

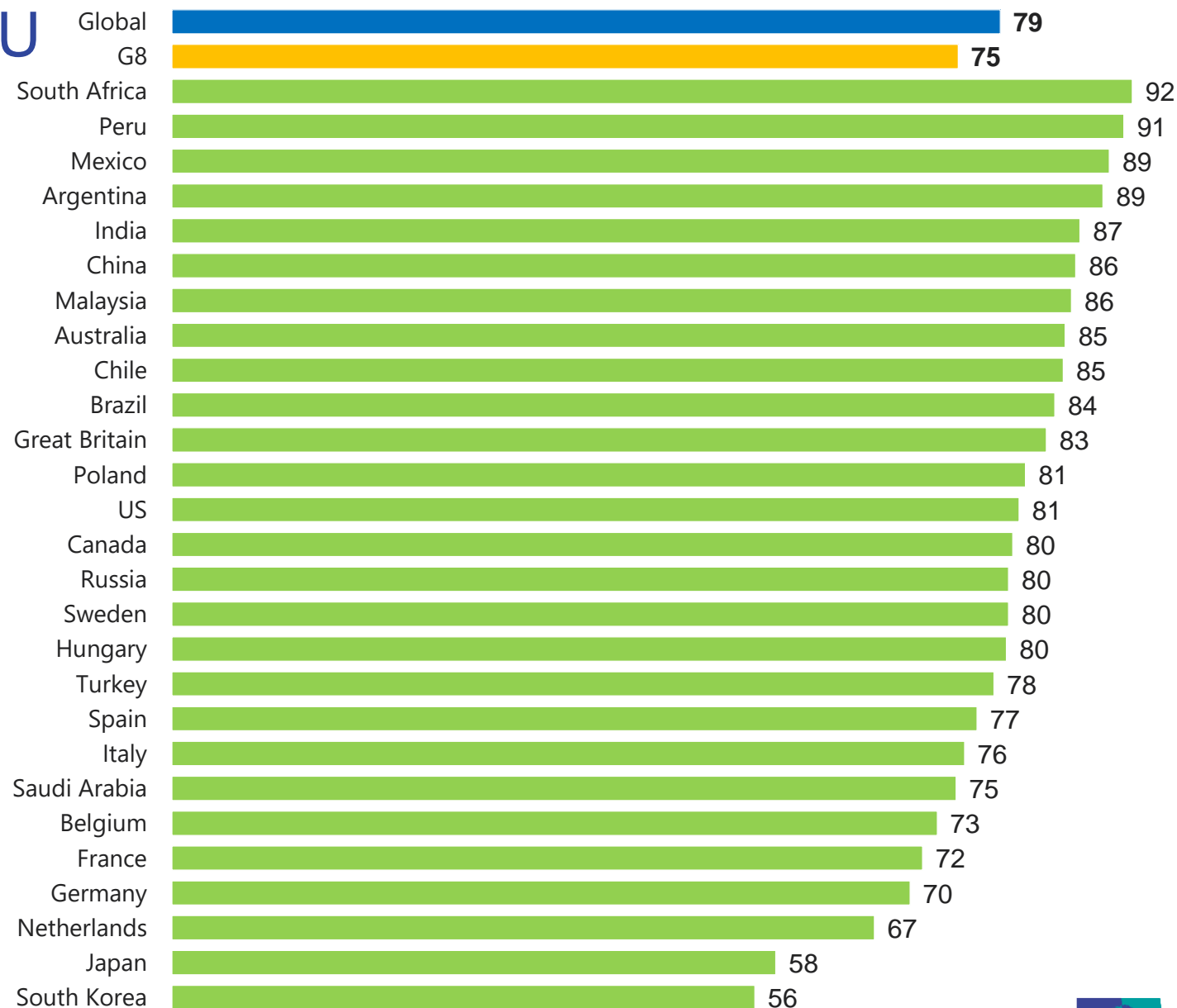| Country	Value
Global	68
G8	61
Peru	88
China	85
India	85
South Africa	84
Mexico	83
Brazil	81
Argentina	78
Chile	77
Australia	76
Malaysia	74
Italy	74
Saudi Arabia	71
Turkey	70
Great Britain	69
Canada	67
Sweden	65
Hungary	65
Spain	65
Germany	63
US	62
Belgium	60
Poland	58
France	57
Russia	54
South Korea	47
Japan	40
Netherlands	39

Base: 19,516 adults (online), July-August 2020

SOUTH AFRICA AND PERU MORE POSITIVE THAN AVERAGE

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

% strongly/tend to agree

Global	79
G8	75
South Africa	92
Peru	91
Mexico	89
Argentina	89
India	87
China	86
Malaysia	86
Australia	85
Chile	85
Brazil	84
Great Britain	83
Poland	81
US	81
Canada	80
Russia	80
Sweden	80
Hungary	80
Turkey	78
Spain	77
Italy	76
Saudi Arabia	75
Belgium	73
France	72
Germany	70
Netherlands	67
Japan	58
South Korea	56

Source: Ipsos/GIIA

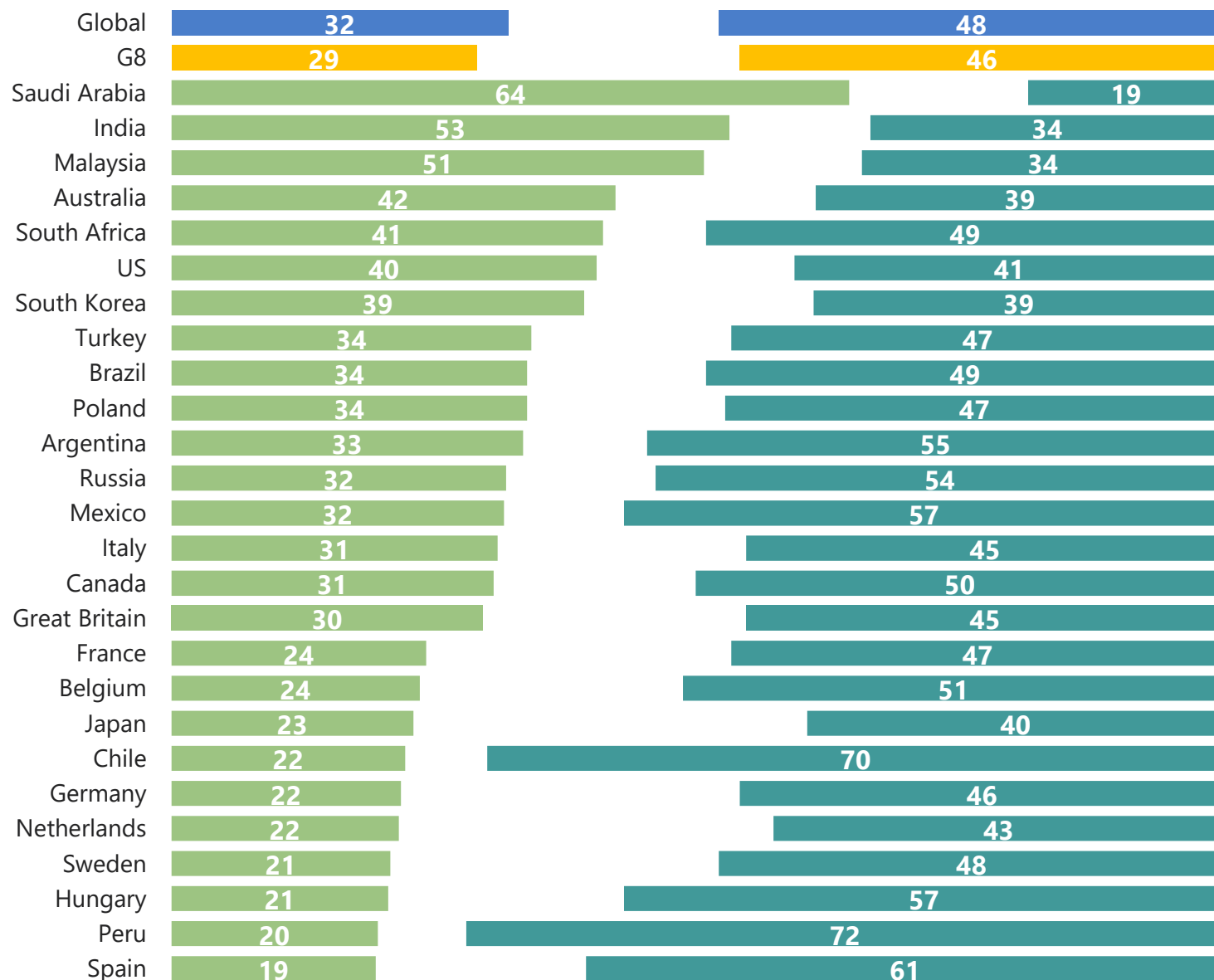*Base: 19,516 adults (online), July-August 2020*

Ipsos

Q. Please read the following pairs of statements, and decide which comes closest to your own opinion. Please choose whether you prefer statement A or B or if you don't prefer one over the other.

A: "We should give highest priority to improving [COUNTRY'S] economic infrastructure such as road, rail and air networks, utilities such as energy and water, and broadband and other communications."

B: "We should give highest priority to improving [COUNTRY'S] social infrastructure such as school and hospital buildings, and housing."

% strongly/tend to prefer A
% strongly/tend to prefer B

Country	Prefer A	Prefer B
Global	32	48
G8	29	46
Saudi Arabia	64	19
India	53	34
Malaysia	51	34
Australia	42	39
South Africa	41	49
US	40	41
South Korea	39	39
Turkey	34	47
Brazil	34	49
Poland	34	47
Argentina	33	55
Russia	32	54
Mexico	32	57
Italy	31	45
Canada	31	50
Great Britain	30	45
France	24	47
Belgium	24	51
Japan	23	40
Chile	22	70
Germany	22	46
Netherlands	22	43
Sweden	21	48
Hungary	21	57
Peru	20	72
Spain	19	61

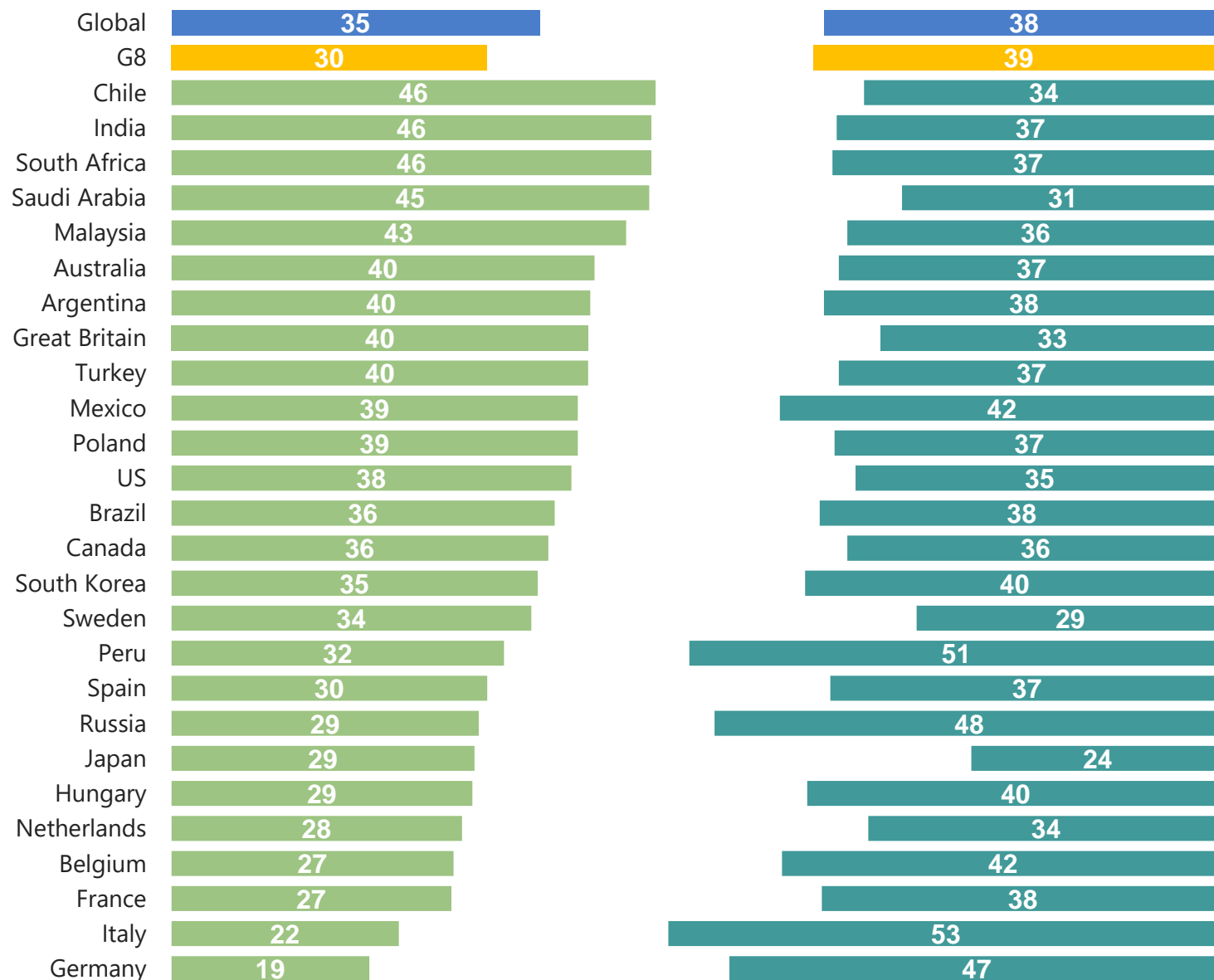Base: 19,516 adults (online), July-August 2020

Ipsos

Q. Please read the following pairs of statements, and decide which comes closest to your own opinion. Please choose whether you prefer statement A or B or if you don't prefer one over the other.

A: "Decisions should be delayed so that the impact of infrastructure projects can be fully understood and the public's views can be heard properly, even if this means that infrastructure problems are not tackled when they need to be."

B: "Decisions should not be delayed so that infrastructure problems can be tackled when they need to be, even if this means that the impact of infrastructure projects cannot be fully understood and the public's views cannot be heard properly."

% strongly/tend to prefer A
% strongly/tend to prefer B

Country	% prefer A	% prefer B
Global	35	38
G8	30	39
Chile	46	34
India	46	37
South Africa	46	37
Saudi Arabia	45	31
Malaysia	43	36
Australia	40	37
Argentina	40	38
Great Britain	40	33
Turkey	40	37
Mexico	39	42
Poland	39	37
US	38	35
Brazil	36	38
Canada	36	36
South Korea	35	40
Sweden	34	29
Peru	32	51
Spain	30	37
Russia	29	48
Japan	29	24
Hungary	29	40
Netherlands	28	34
Belgium	27	42
France	27	38
Italy	22	53
Germany	19	47

Base: 19,516 adults (online), July-August 2020

METHODOLOGY

- **2020:** 27 countries, **19,516** participants, **24 July–7 August 2020** (online):
    Argentina, Australia*, Belgium, Brazil*, Canada*, Chile, China*, France*, Germany*, Great Britain*, Hungary, India, Italy*, Japan*, Malaysia, Mexico, Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa,   South Korea, Serbia, Spain*, Sweden, Turkey and the United States of America*   *denotes 1,000+ sample size*

- **2019:** 28 countries, **26 July–9 August 2019**:
    Argentina, Australia*, Belgium, Brazil, Canada*, Chile, China*, Colombia, France*, Germany*, Great Britain *, Hungary, India*, Italy*, Japan*, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa,   South Korea, Serbia, Spain*, Sweden, Turkey and the United States of America*   *denotes 1,000+ sample size*

- Participants were adults aged 18-64 in the US and Canada, 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 2016-2019 surveys used the same methodology, but the profile of participating countries changed. This means that the **global trend** does not always involve a like-for-like comparison.

- A selection of trends is included. Further information is available:

    https://www.ipsos.com/en/global-infrastructure-index-public-satisfaction-and-priorities-2019 (2019)
    https://www.ipsos.com/en/global-infrastructure-index-public-satisfaction-and-priorities-2018 (2018)
    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 AND SAMPLE SIZES

Europe

8,005

Belgium
France
Germany
Great Britain
Hungary
Italy
Netherlands
Poland
Spain
Sweden

N. America

2,002

Canada
U.S.A.

LATAM

3,003

Argentina
Brazil
Chile
Mexico
Peru

APAC

4,507

Australia
India
Japan
Malaysia
South Korea

G8

7,506

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

BRIC

3,001

Brazil
Russia
India
China

ME Africa

1,499

Saudi Arabia
South Africa
Turkey

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