

GLOBAL INFRASTRUCTURE INDEX 2021

28 country study, July-August 2021

Global summary – U.S. Edition

For more details, go to: <https://www.ipsos.com/en-us/news-polls/2021-Global-Infrastructure-Index>

In partnership with:



GLOBALLY MORE ARE SATISFIED THAN NOT WITH THEIR INFRASTRUCTURE, BUT MANY ARE ON THE FENCE

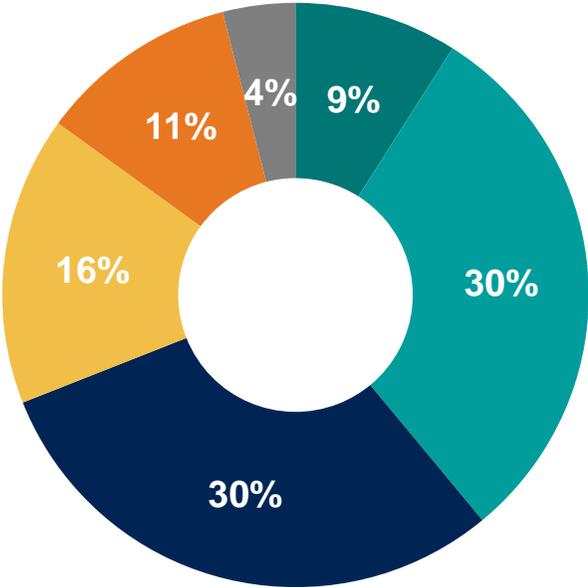
Q. We now want you to think about [COUNTRY'S] infrastructure. By infrastructure we mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

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

The **Global Country Average** reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country and is not intended to suggest a total result.

Dissatisfied
27%

Satisfied
39%



GLOBAL COUNTRY AVERAGE

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

Source: Ipsos/GIIA
Base: 19,514 adults (online), July-August 2021

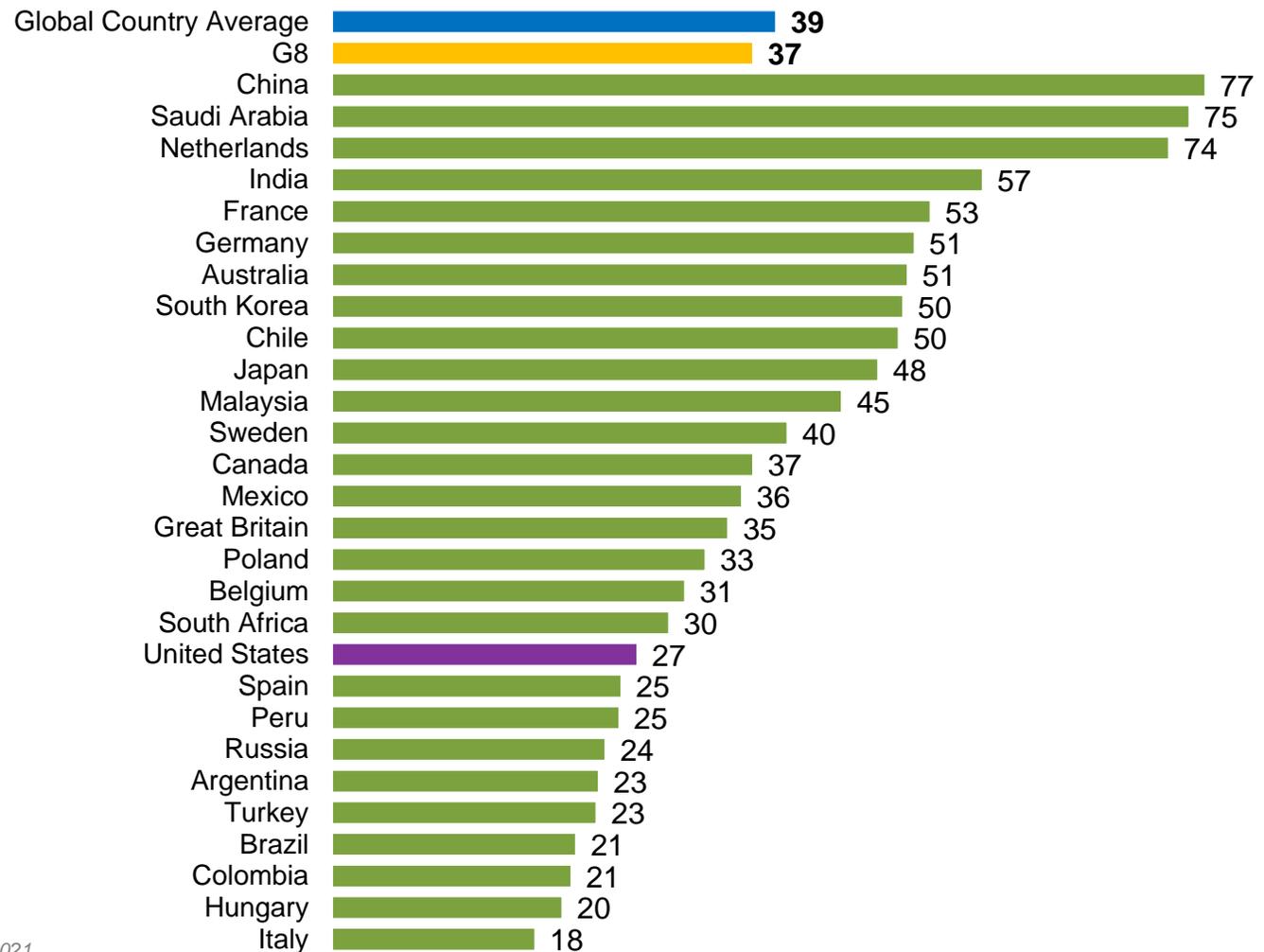


SATISFACTION WITH INFRASTRUCTURE VARIES WIDELY ACROSS COUNTRIES AND IS ESPECIALLY LOW IN THE U.S.

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?

% very/fairly satisfied



Online samples in Brazil, China, Chile, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.

Source: Ipsos/GIIA
Base: 19,514 adults (online) including 500+ or 1,000+ in each country, July-August 2021



SATISFACTION WITH INFRASTRUCTURE IN BOTH NORTH AND LATIN AMERICA IS LOWER THAN IN OTHER REGIONS

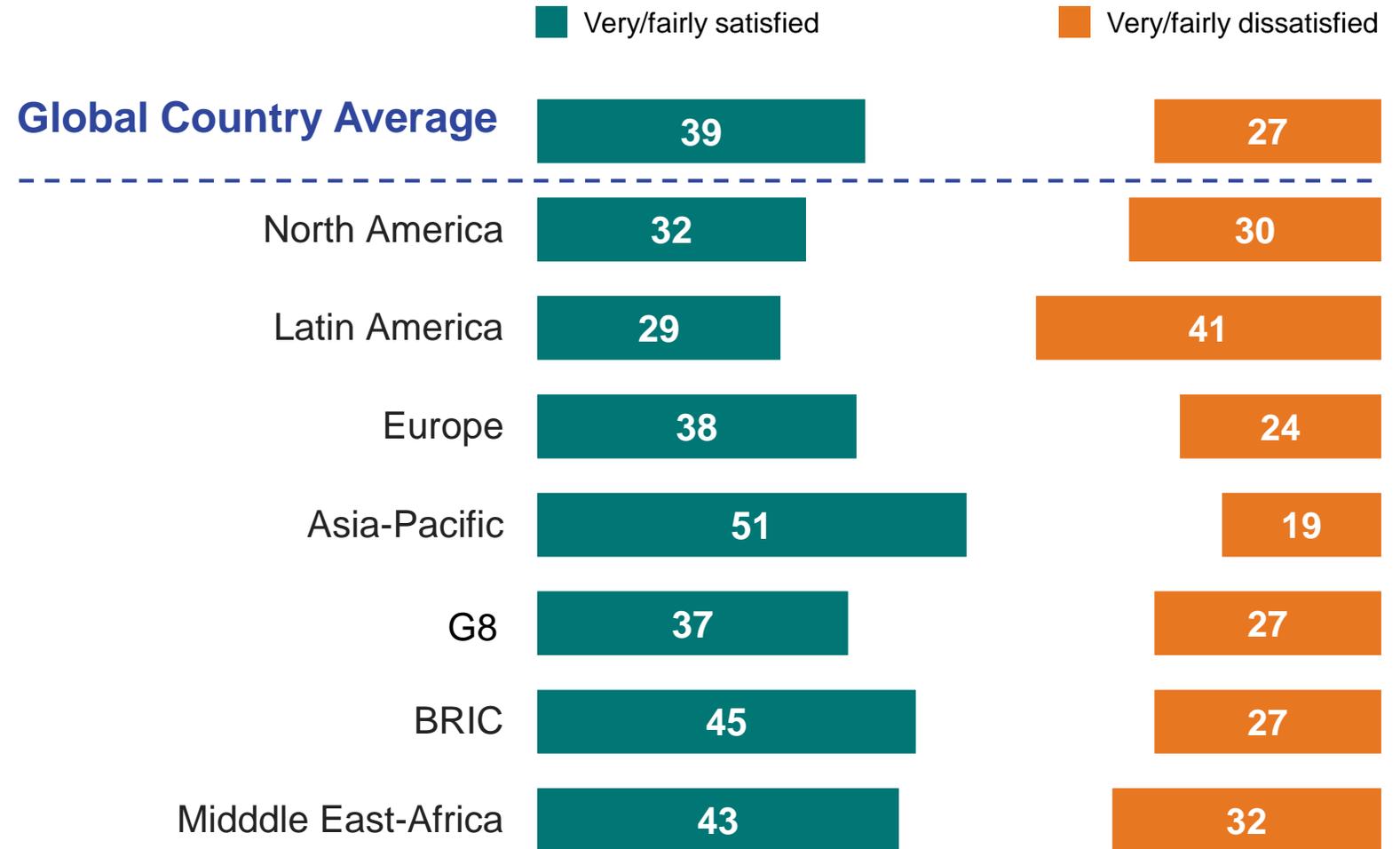
Q. We now want you to think about [COUNTRY'S] infrastructure.

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?

All figures are %s

See [slide 18](#) for note on regional classifications. The **Global Country Average** reflects the average result for all the countries where the survey was conducted.



Source: Ipsos/GIIA
Base: 19,514 adults (online), July-August 2021

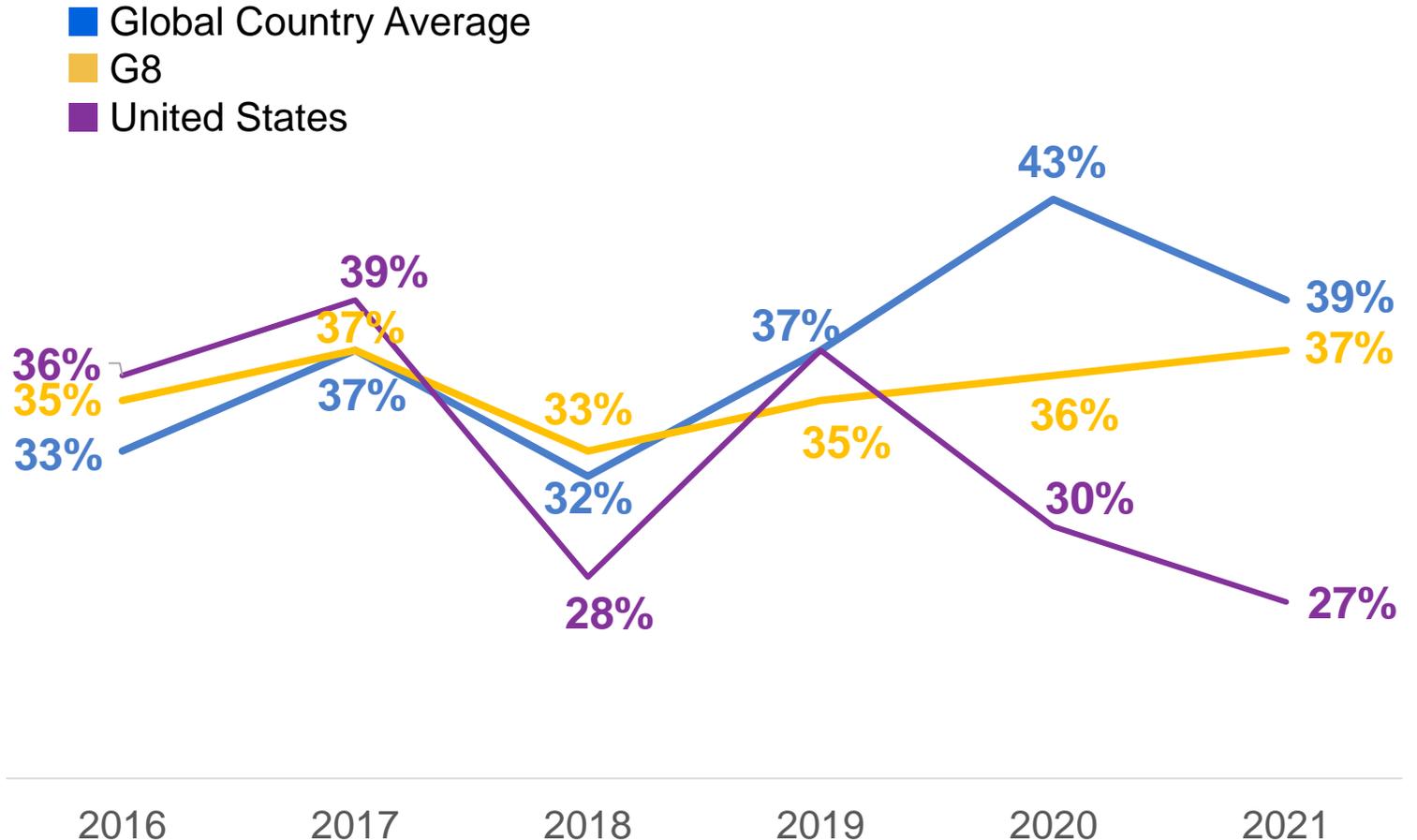
SATISFACTION BOUNCED BACK FROM 2018 DIP GLOBALLY AND IN G8 COUNTRIES, BUT NOT IN THE U.S.

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?

% very/fairly satisfied

The Global Country Average reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country and is not intended to suggest a total result. The 2016-2020 surveys used the same methodology, but the profile of participating countries changed. This means that the global country average/trend does not always involve a completely like-for-like comparison.

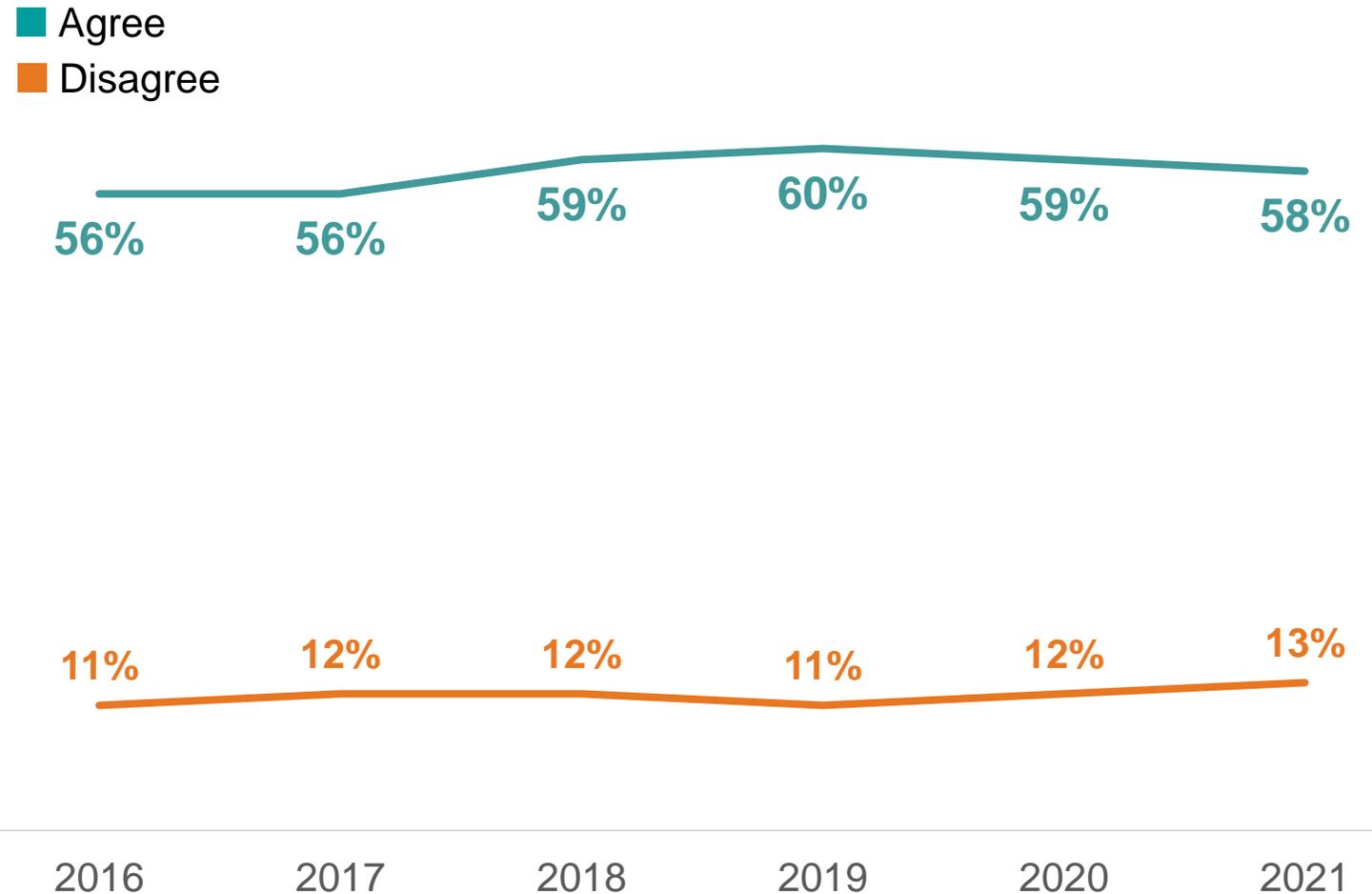


Source: Ipsos/GIIA
Base (2021): 19,514 adults (online), including 1,001 in the U.S. and 7,504 across all G8 countries, July-August 2021

GLOBALLY, INFRASTRUCTURE CONTINUES TO BE AN AREA WHERE THE PUBLIC FEELS MORE NEEDS TO BE DONE...

Q. To what extent do you agree or disagree...“As a country we are not doing enough to meet our infrastructure needs”

Global Country Average



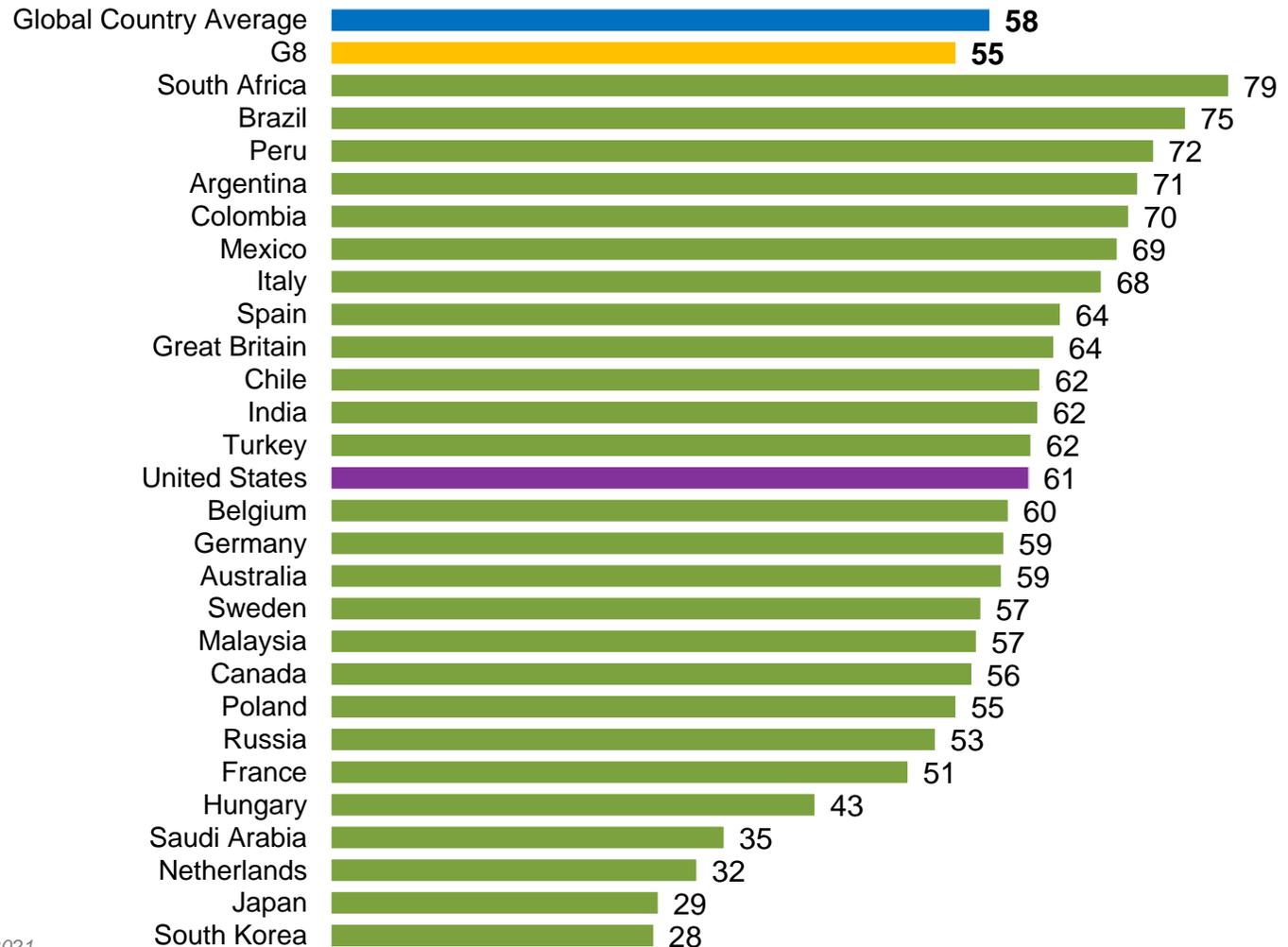
Source: Ipsos/GIIA
Base: 19,514 adults (online), July-August 2021

A MAJORITY IN MOST COUNTRIES, INCLUDING THE U.S. AGREE NOT ENOUGH IS BEING DONE

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



Online samples in Brazil, China, Chile, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.

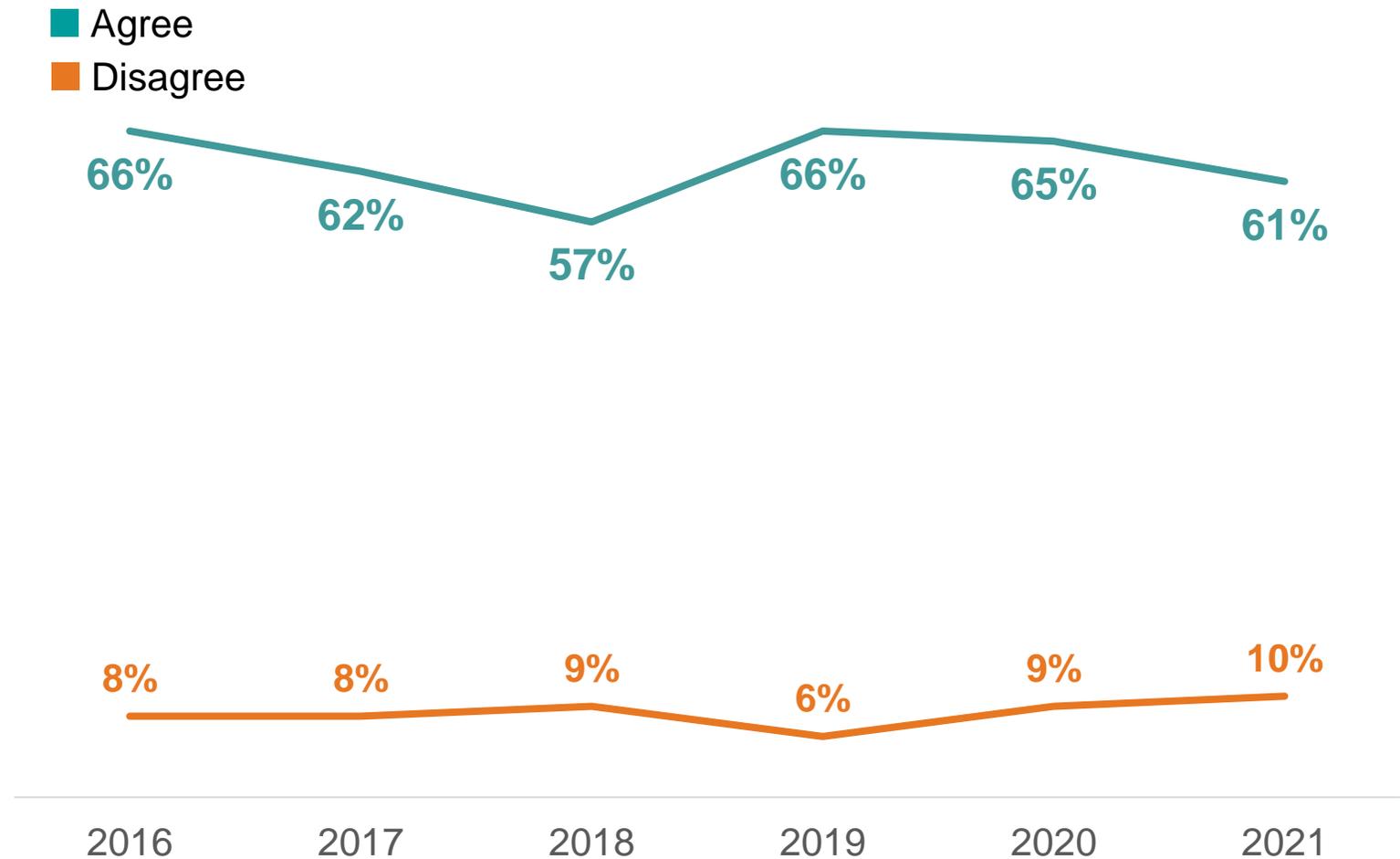
Source: Ipsos/GIIA
Base: 19,514 adults (online) including 500+ or 1,000+ in each country, July-August 2021



IN THE U.S., SENTIMENT HAS MOVED, BUT THERE IS A STEADFAST SENSE THAT NOT ENOUGH IS BEING DONE

Q. To what extent do you agree or disagree...“As a country we are not doing enough to meet our infrastructure needs”

United States



Source: Ipsos/GIIA
Base: 1,001 US adults (online), July-August 2021

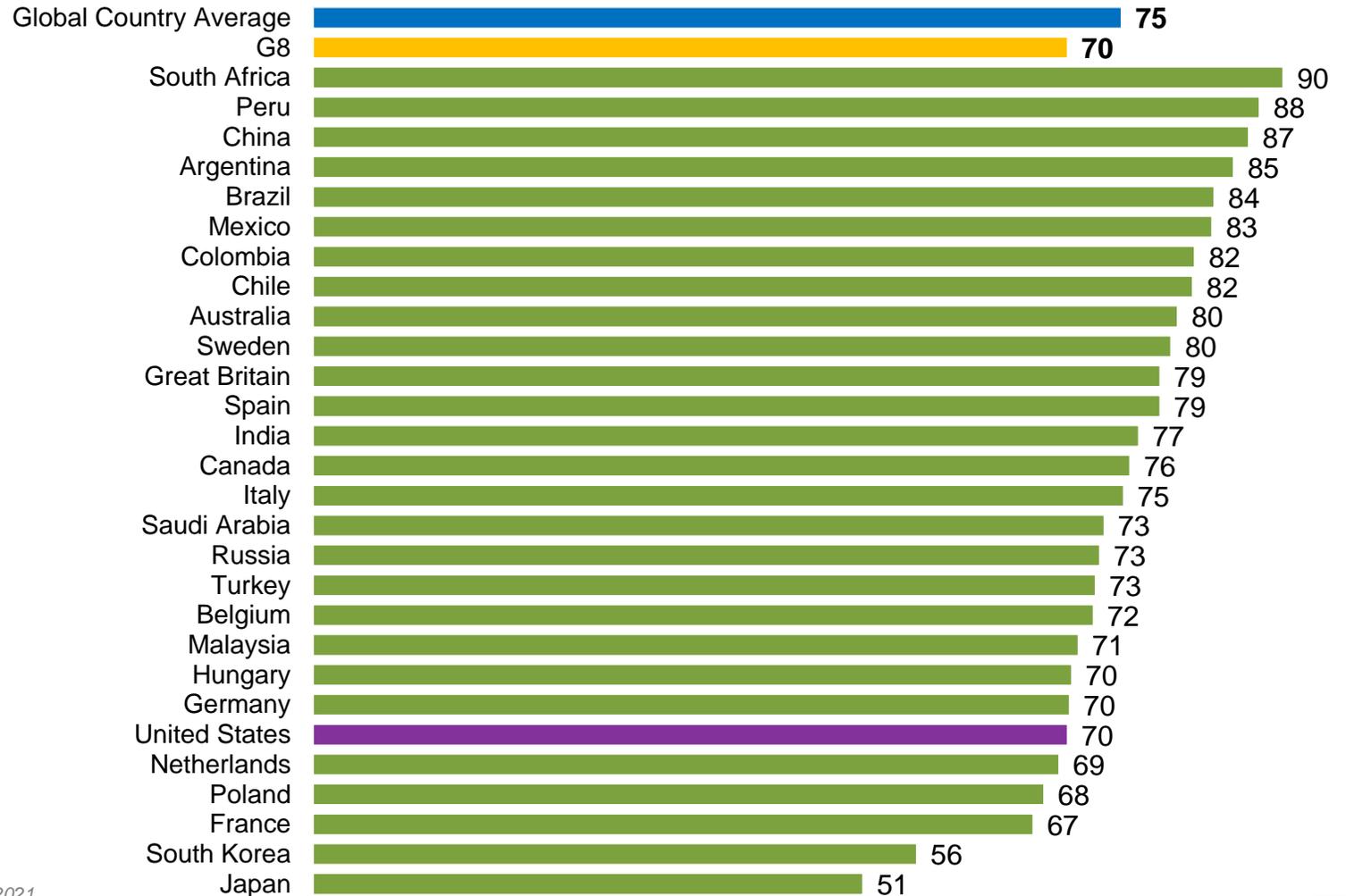
EVERYWHERE, INVESTING IN INFRASTRUCTURE IS WIDELY SEEN AS CREATING JOBS AND BOOSTING THE ECONOMY

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

Online samples in Brazil, China, Chile, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.

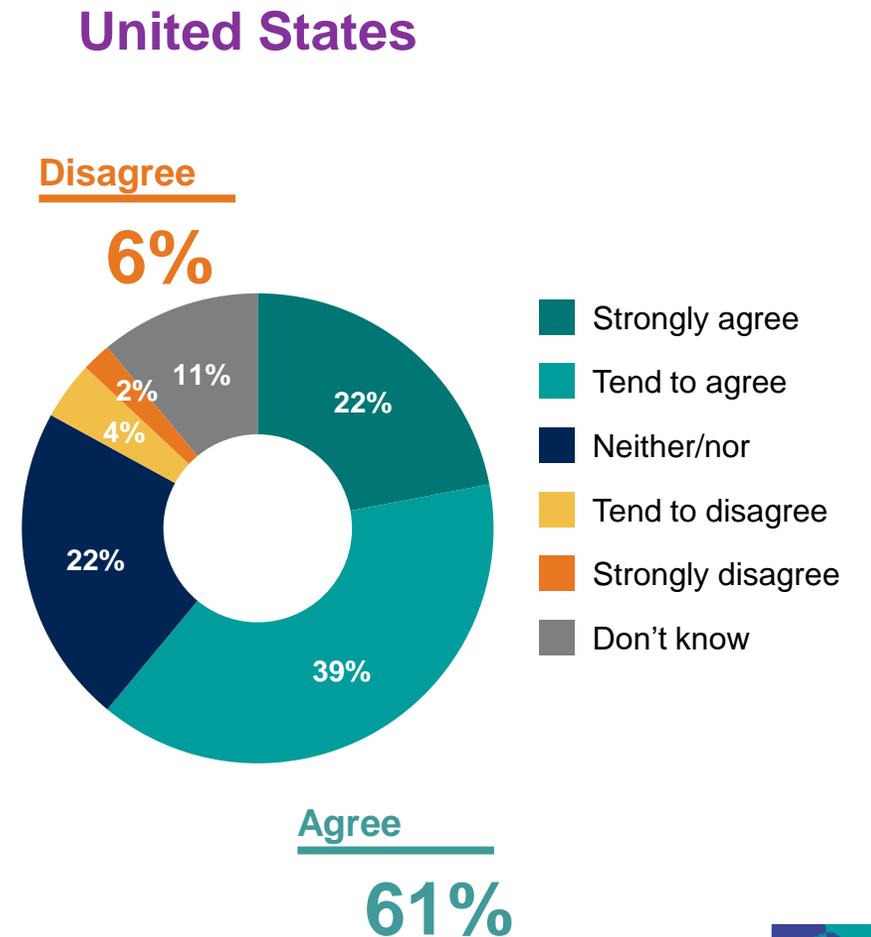
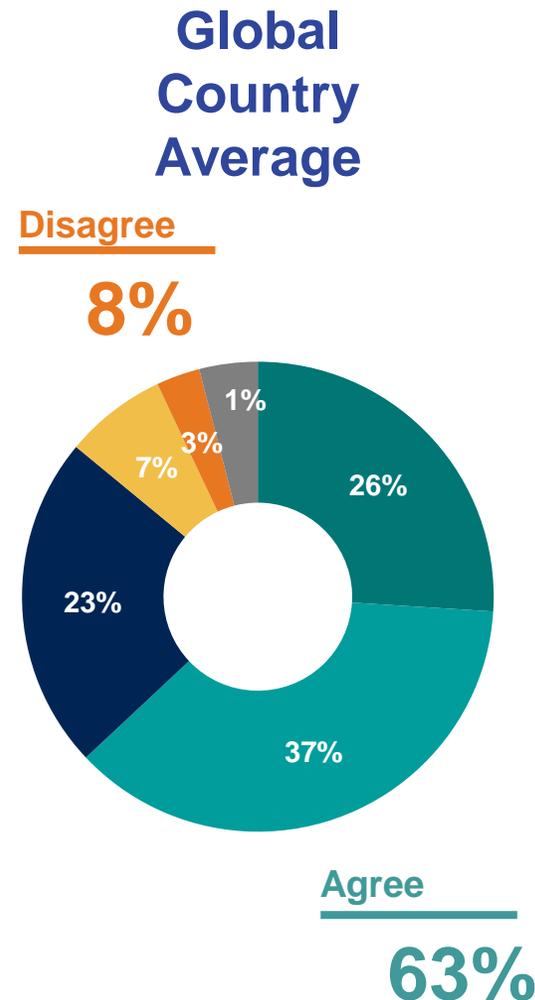


Source: Ipsos/GIIA
Base: 19,514 adults (online) including 500+ or 1,000+ in each country, July-August 2021

A CLEAR MAJORITY BOTH IN THE U.S. AND GLOBALLY ARE COMFORTABLE WITH PRIVATE SECTOR INVESTMENT

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”



Source: Ipsos/GIIA
Base: 19,514 adults (online), including 1,001 in U.S., July-August 2021

PRIORITIES AND PREFERENCES

AS BEFORE, THERE IS STRONG COMPETITION FOR THE TOP INVESTMENT PRIORITIES

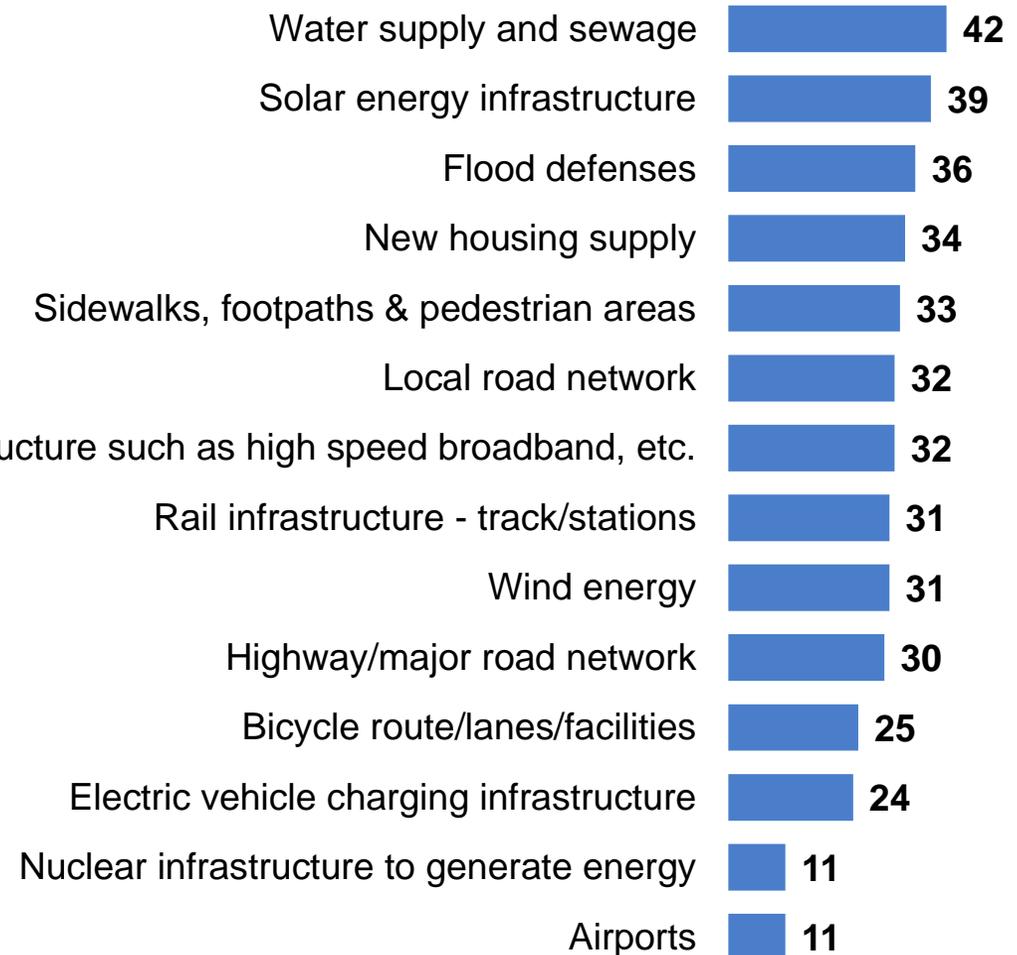
Q. Which of these types of infrastructure, if any, do you think should be made a priority for investment for...
[COUNTRY]?

% selecting

Global Country Average

N.B. **Nuclear** not asked in Australia, Chile, Italy, Malaysia, Peru, Poland, Saudi Arabia, Turkey - % shown based on all countries where asked

Source: Ipsos/GIIA
Base: 19,514 adults (online), July-August 2021

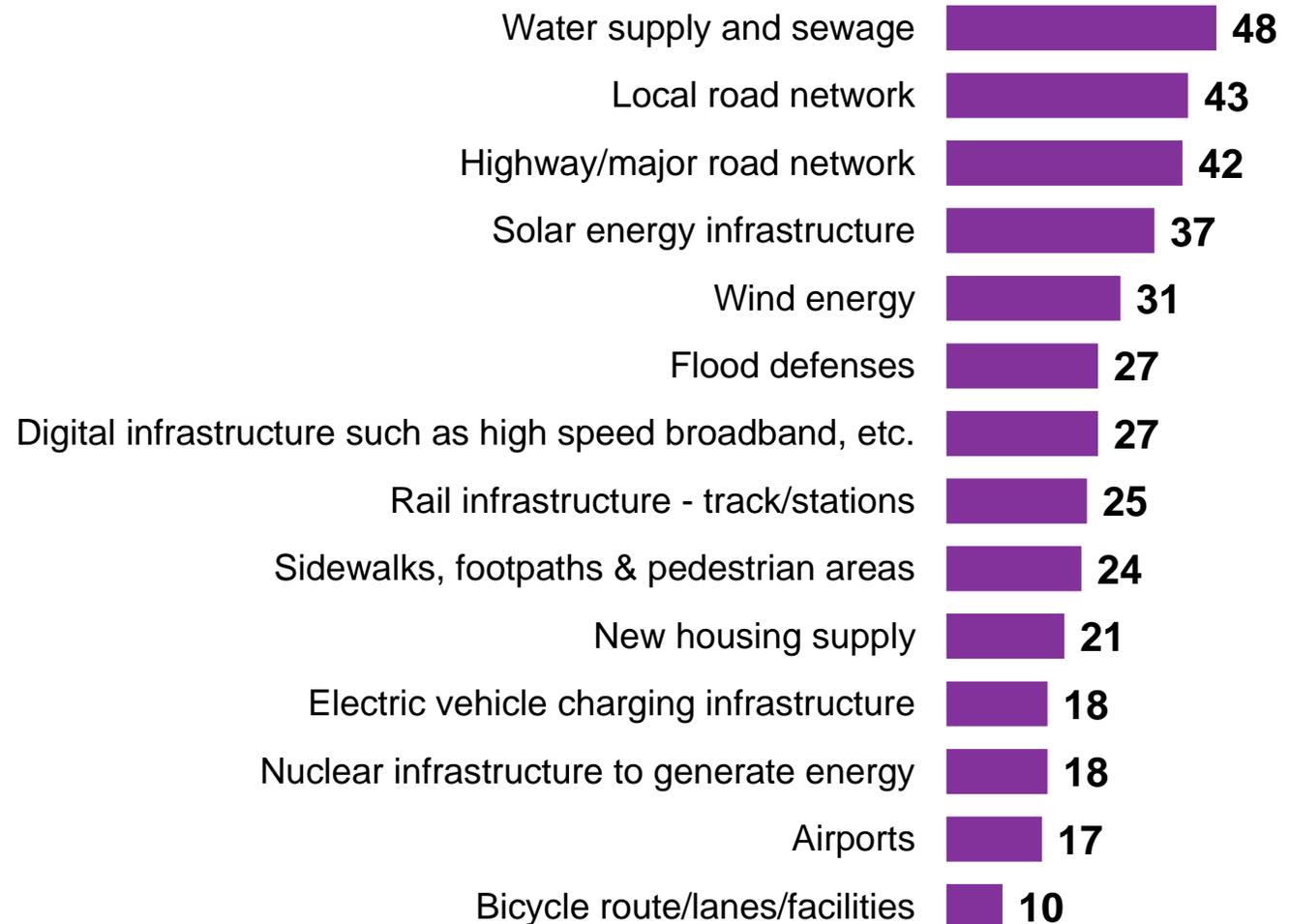


IN THE U.S., WATER AND ROADS RELATIVELY MORE SALIENT

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

% selecting

United States



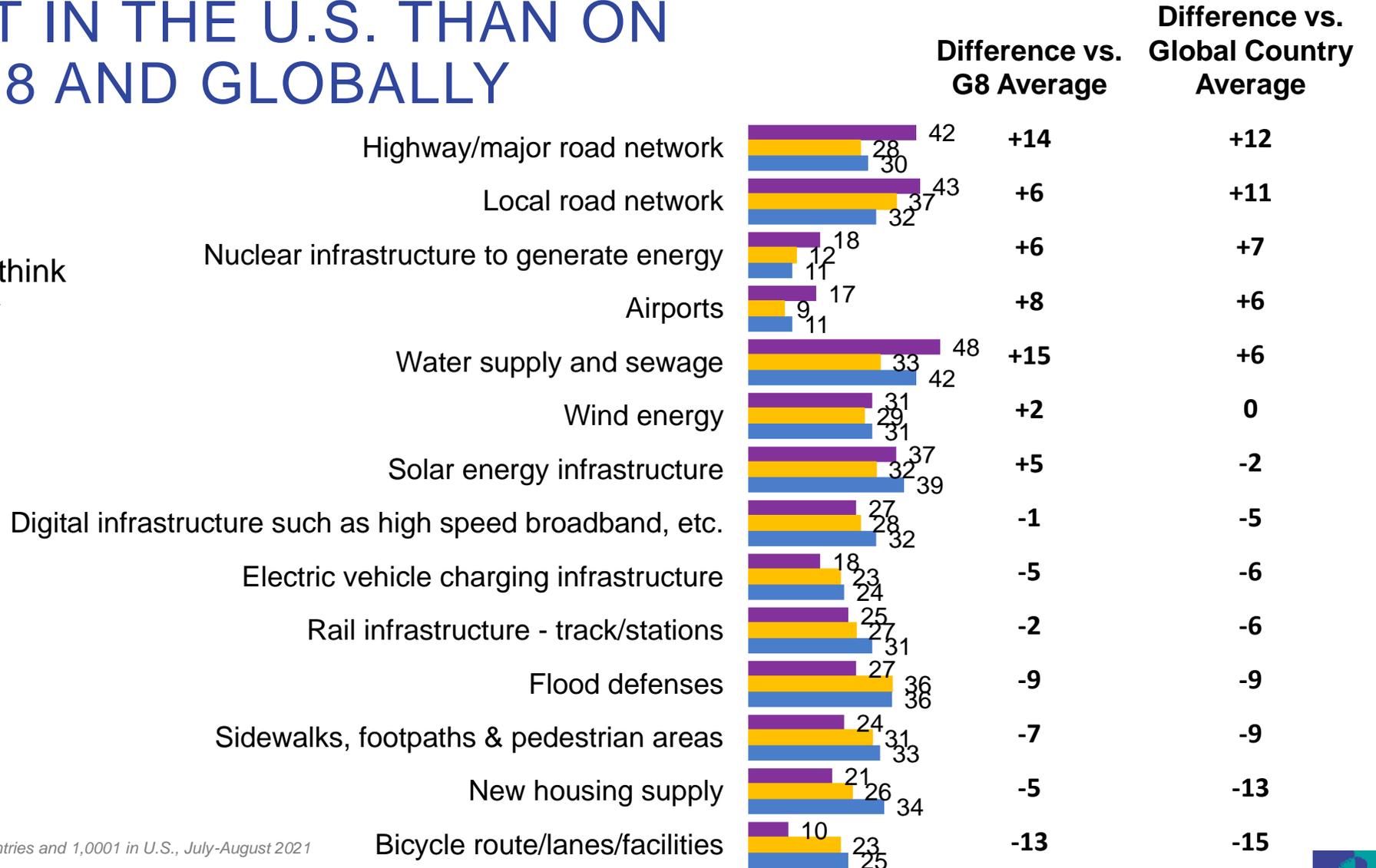
Source: Ipsos/GIIA
Base: 1,001 US (online), July-August 2021

UTILITIES, ROADS AND AIRPORTS ARE MORE SALIENT IN THE U.S. THAN ON AVERAGE IN G8 AND GLOBALLY

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

% selecting

- United States
- G8 Average
- Global Country Average



Source: Ipsos/GIIA
 Base: 19,514 adults (online), incl. 7,504 across all G8 countries and 1,000 in U.S., July-August 2021



GLOBALLY, THE PUBLIC CLEARLY PRIORITIZES THE ENVIRONMENTAL IMPACT OVER THE ECONOMIC IMPACT OF INFRASTRUCTURE IMPROVEMENT; AMERICANS ARE SPLIT

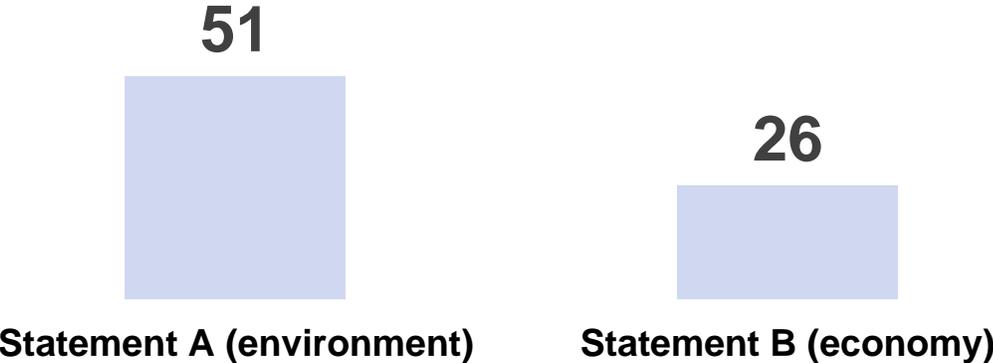
Statement A: “When making decisions about how to improve infrastructure in [COUNTRY], we should give higher priority to the impact it has on the environment.”

Statement B: ““When making decisions about how to invest in infrastructure in [COUNTRY], we should give higher priority to the impact it has on the economy.”

Global Country Average

% strongly/tend to prefer each statement

United States



Source: Ipsos/GIIA
Base: 19,514 adults (online), including 1,001 in U.S., July-August 2021



U.S. AND GLOBAL PUBLIC CONTINUES TO STRONGLY PREFER MAINTAINING AND REPAIRING OVER BUILDING NEW INFRASTRUCTURE

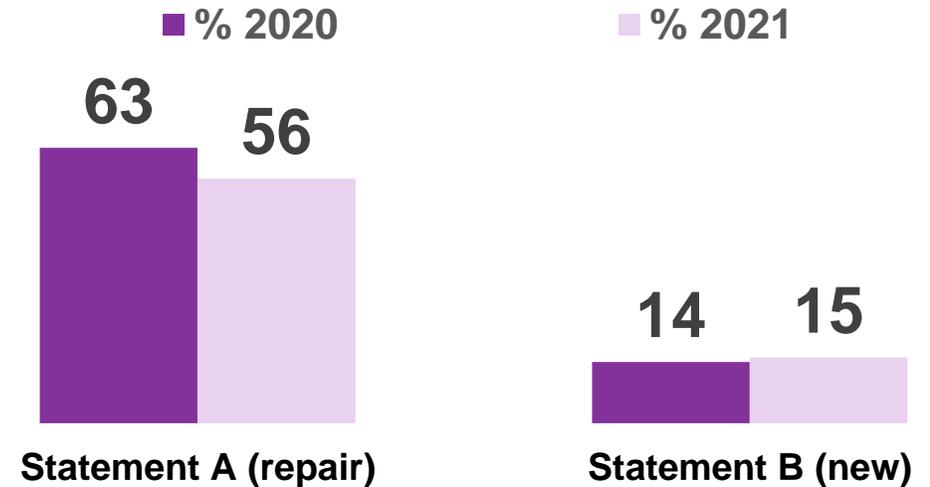
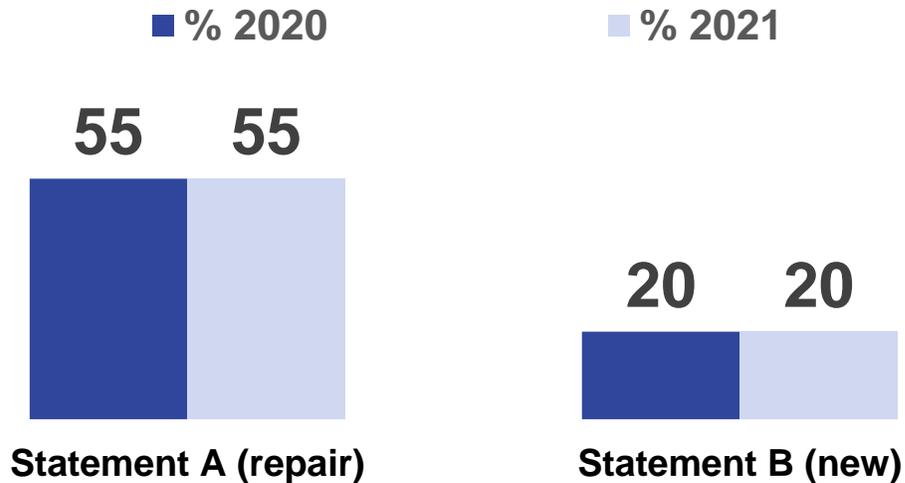
Statement A: “We should prioritise maintaining and repairing existing infrastructure in [COUNTRY] before spending on new infrastructure.”

Statement B: “We need to spend money on new infrastructure in [COUNTRY] even if it means having less to spend less on maintaining and repairing existing infrastructure.”

Global Country Average

% strongly/tend to prefer each statement

United States



Source: Ipsos/GIIA
Base (2021): 19,514 adults (online), including 1,001 in U.S., July-August 2021

GLOBALLY, SOCIAL INFRASTRUCTURE IS SEEN AS MORE OF A PRIORITY THAN ECONOMIC INFRASTRUCTURE, BUT IT'S THE OPPOSITE IN THE U.S.

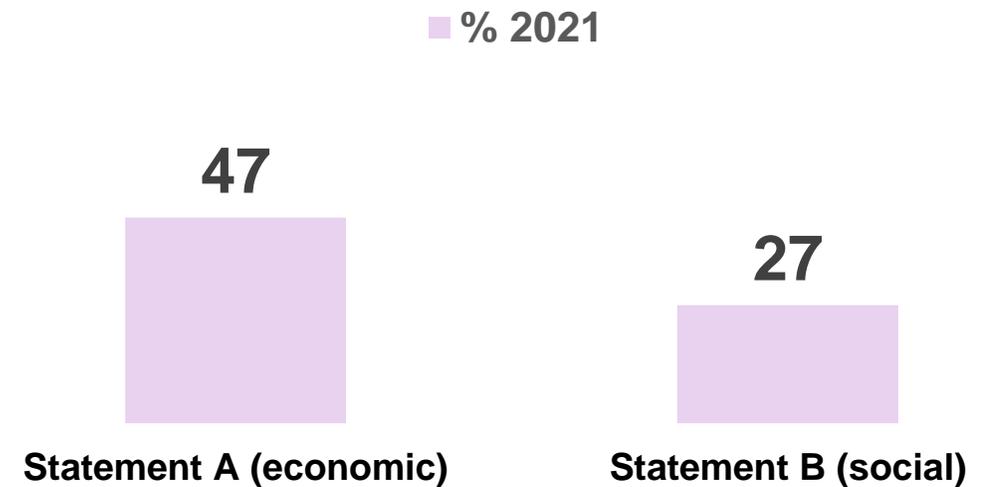
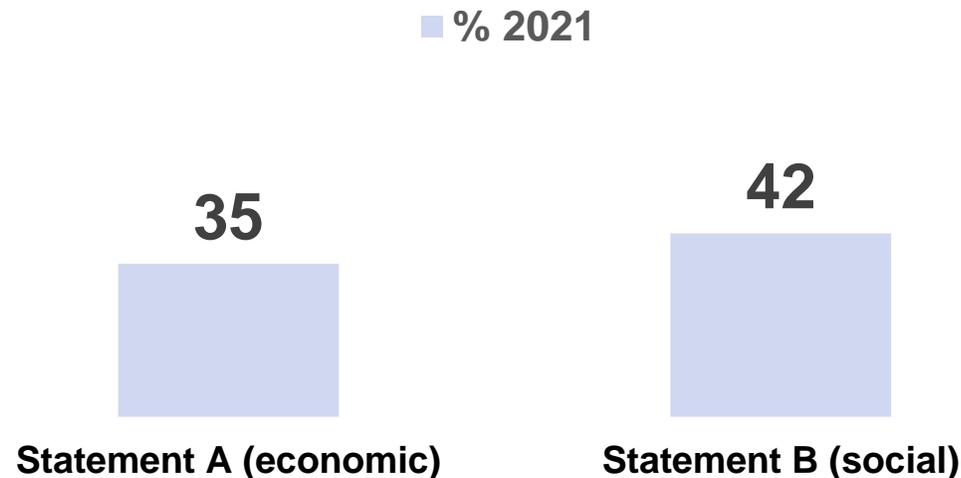
Statement A: “We should give highest priority to improving [COUNTRY]’s economic infrastructure such as road, rail and air networks, utilities such as energy and water, and broadband and other communications.”

Statement B: “We should give highest priority to improving [COUNTRY]’s social infrastructure such as school and hospital buildings, and housing.”

Global Country Average

% strongly/tend to prefer each statement

United States



Source: Ipsos/GIIA
Base: 19,514 adults (online), including 1,001 in U.S., July-August 2021

IN THE PAST YEAR, SENTIMENT HAS SHIFTED TOWARD INVESTMENT IN ECONOMIC INFRASTRUCTURE GLOBALLY AND ESPECIALLY SO IN THE U.S.

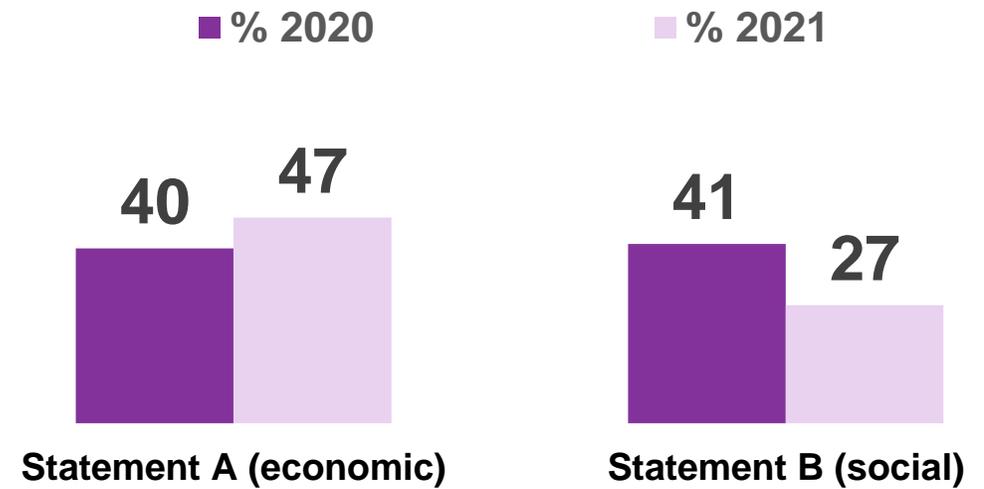
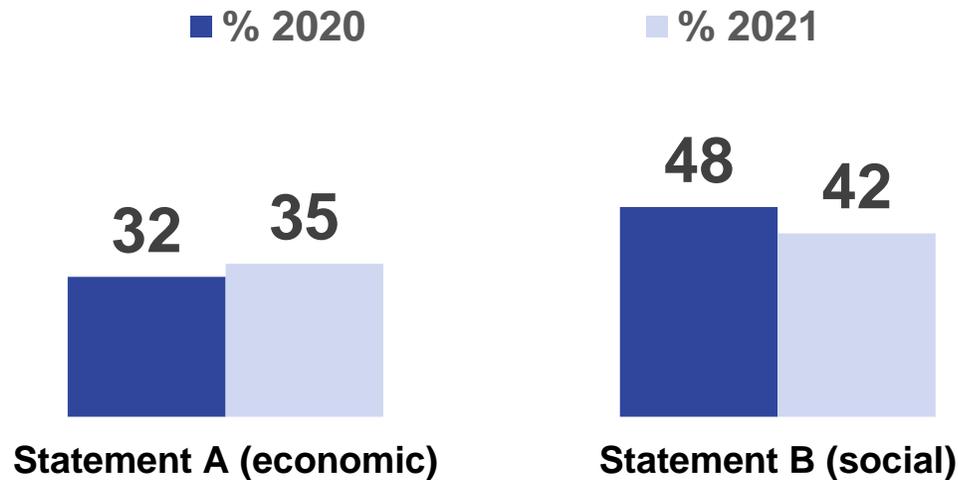
Statement A: “We should give highest priority to improving [COUNTRY]’s economic infrastructure such as road, rail and air networks, utilities such as energy and water, and broadband and other communications.”

Statement B: “We should give highest priority to improving [COUNTRY]’s social infrastructure such as school and hospital buildings, and housing.”

Global Country Average

% strongly/tend to prefer each statement

United States



Source: Ipsos/GIIA
Base (2021): 19,514 adults (online), including 1,001 in U.S., July-August 2021

GLOBALLY, THE ENVIRONMENT AND QUALITY ARE TOP PRIORITIES

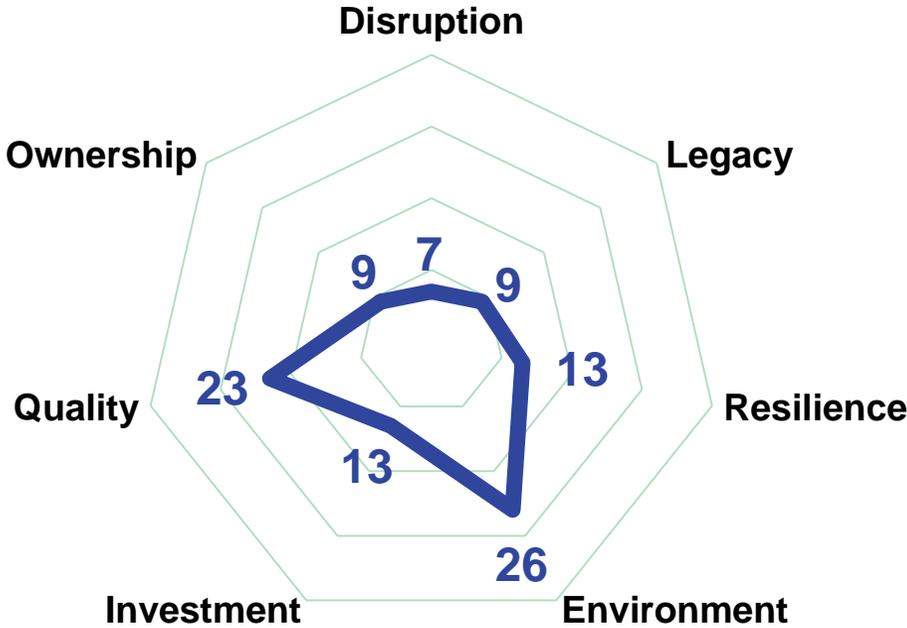
Q. Which of the following factors do you think are the most important for [COUNTRY] to consider when putting together plans for infrastructure in the future? Please rank the following...

% ranking factor as most important

(1st out of 7)

All % figures shown are Global Country Average

■ Global Country Average



Factor
Disruption: the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved
Legacy: the infrastructure that we pass on to future generations
Resilience: how well our infrastructure stands up to challenges today and in the future (e.g. population increases and climate change)
Environment: the impact our infrastructure has on our environment
Investment: paying for the costs of improving and building new infrastructure now, to avoid having to pay more later
Quality: making sure that infrastructure is as good as it possibly can be (e.g. in terms of speed or convenience of services)
Ownership: whether the infrastructure is owned by the public sector – that is, national or local government or some other public sector body – or private businesses

Source: Ipsos/GIIA
Base: 19,514 adults (online), July-August 2021



AMERICANS ATTACH HIGHER PRIORITY TO QUALITY

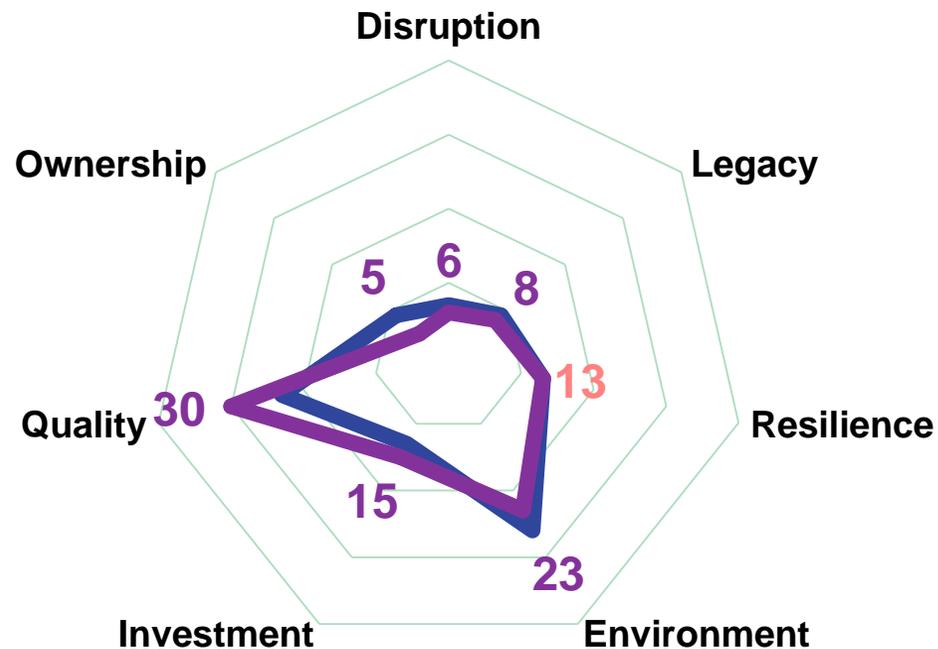
Q. Which of the following factors do you think are the most important for [COUNTRY] to consider when putting together plans for infrastructure in the future? Please rank the following...

% ranking factor as most important

(1st out of 7)

All % figures shown are for the United States

■ Global Country Average
■ United States



Factor

Disruption: the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved

Legacy: the infrastructure that we pass on to future generations

Resilience: how well our infrastructure stands up to challenges today and in the future (e.g. population increases and climate change)

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Source: Ipsos/GIIA
Base: 19,514 adults (online), including 1,001 in U.S., July-August 2021

Globally, Ownership, Disruption and Legacy are Relatively Low Priorities

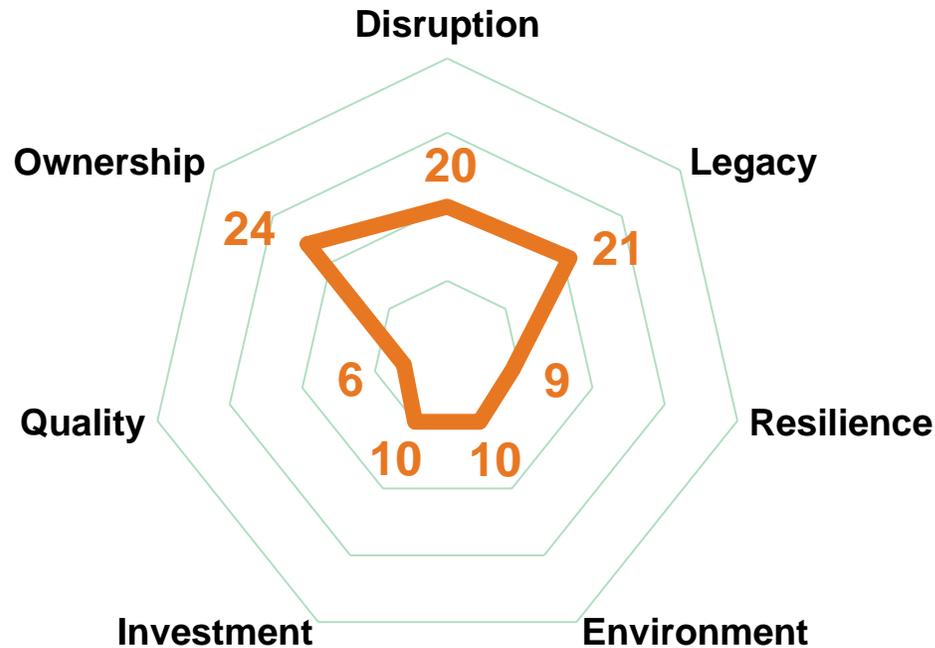
Q. Which of the following factors do you think are the most important for [COUNTRY] to consider when putting together plans for infrastructure in the future? Please rank the following...

% ranking factor as most important

(7th out of 7)

All % figures shown are Global Country Average

■ Global Country Average



Factor

Disruption: the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved

Legacy: the infrastructure that we pass on to future generations

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Ownership: whether the infrastructure is owned by the public sector – that is, national or local government or some other public sector body – or private businesses

Source: Ipsos/GIIA
Base: 19,514 adults (online), July-August 2021

OWNERSHIP AND LEGACY ARE MOST LIKELY TO BE CONSIDERED LOWEST PRIORITY IN THE U.S.

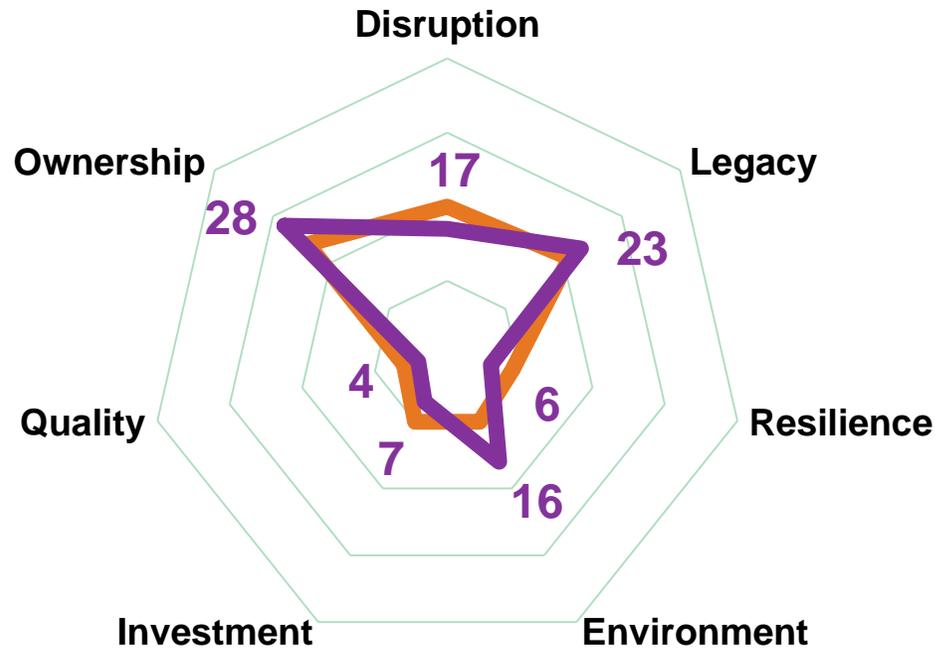
Q. Which of the following factors do you think are the most important for [COUNTRY] to consider when putting together plans for infrastructure in the future? Please rank the following...

% ranking factor as most important

(7th out of 7)

All % figures shown are for the United States

■ Global Country Average
■ United States



Factor

Disruption: the amount of disruption we have to deal with (e.g. roadworks, disruptions to water supply) while infrastructure is built or improved

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Source: Ipsos/GIIA
Base: 19,514 adults (online), including 1,001 in U.S., July-August 2021

TECHNICAL DETAILS

METHODOLOGY

- **2021:** 28 countries, **19,514** participants, **July 23 – August 6, 2021** (online):
Argentina, Australia*, Belgium, Brazil*, Canada*, Chile, China*, Colombia, France*, Germany*, Great Britain*, Hungary, India, Italy*, Japan*, Malaysia, Mexico, Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain*, Sweden, Turkey and the United States of America* * denotes 1,000+ sample size; 500+ elsewhere
- The samples in Brazil, China, Chile, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey are more urban, more educated and/or more affluent than the general population. Results should be viewed as reflecting the views of the more “connected” segment of their population.
- Participants were adults aged 18-74 in the US and Canada, and adults aged 16-74 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 2016-2020 surveys used the same methodology, but the profile of participating countries changed. This means that the **global country average/trend** does not always involve a completely like-for-like comparison. Details are available:

<https://www.ipsos.com/ipsos-mori/en-uk/survey-shows-strong-public-backing-investment-infrastructure-aid-recovery> (2020) - 27 countries

<https://www.ipsos.com/en/global-infrastructure-index-public-satisfaction-and-priorities-2019> (2019) - 28 countries

<https://www.ipsos.com/en/global-infrastructure-index-public-satisfaction-and-priorities-2018> (2018) - 29 countries

<https://www.ipsos.com/ipsos-mori/en-uk/rail-joins-housing-top-infrastructure-priorities-britons> (2017) - 28 countries

<https://www.ipsos.com/ipsos-mori/en-uk/do-more-poll-shows-britons-behind-action-infrastructure> (2016) - 26 countries

ONLINE SURVEY, 28 COUNTRIES, JULY 23 – AUGUST 6, 2021

- N.B. the 2016-21 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. Participants were adults aged 18-74 in Canada, Malaysia, South Africa, Turkey, and the U.S., 16-74 elsewhere.



Europe

7,502

- Belgium
- France
- Germany
- Great Britain
- Hungary
- Italy
- Netherlands
- Poland
- Spain
- Sweden

North America

2,002
Canada
United States

Latin America

3,503
Argentina
Brazil
Chile
Colombia
Mexico
Peru

Asia-Pacific

4,506
Australia
China
India
Japan
Malaysia
South Korea

G8

7,504
Canada
France
Germany
Great Britain
Italy
Japan
Russia
United States

BRIC

3,005
Brazil
Russia
India
China

Middle East-Africa

1,501
Saudi Arabia
South Africa
Turkey

Source: Ipsos/GIIA
Base: 19,514 adults (online), July-August 2021



FURTHER INFORMATION



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