

GLOBAL INFRASTRUCTURE INDEX 2021

28 country study, July-August 2021

Global summary

In partnership with:



GAME CHANGERS



INFRASTRUCTURE: MORE ARE SATISFIED THAN NOT, BUT MANY ARE ON THE FENCE

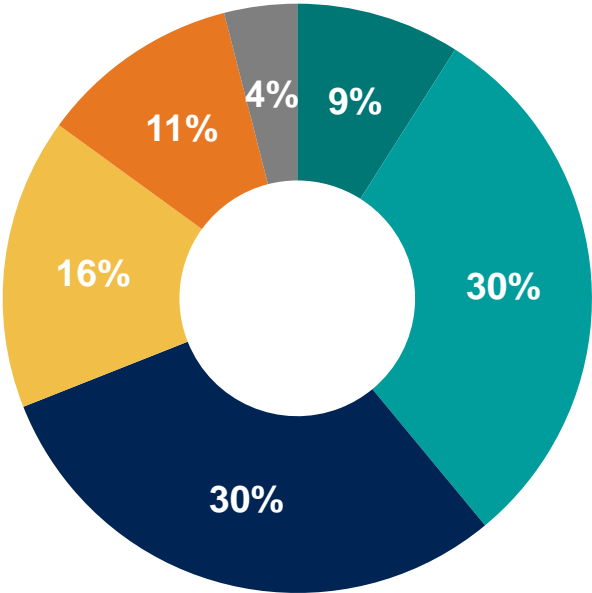
Q. We now want you to think about [COUNTRY'S] infrastructure. By infrastructure we mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

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/GIA
Base: 19,514 adults (online), July-August 2021

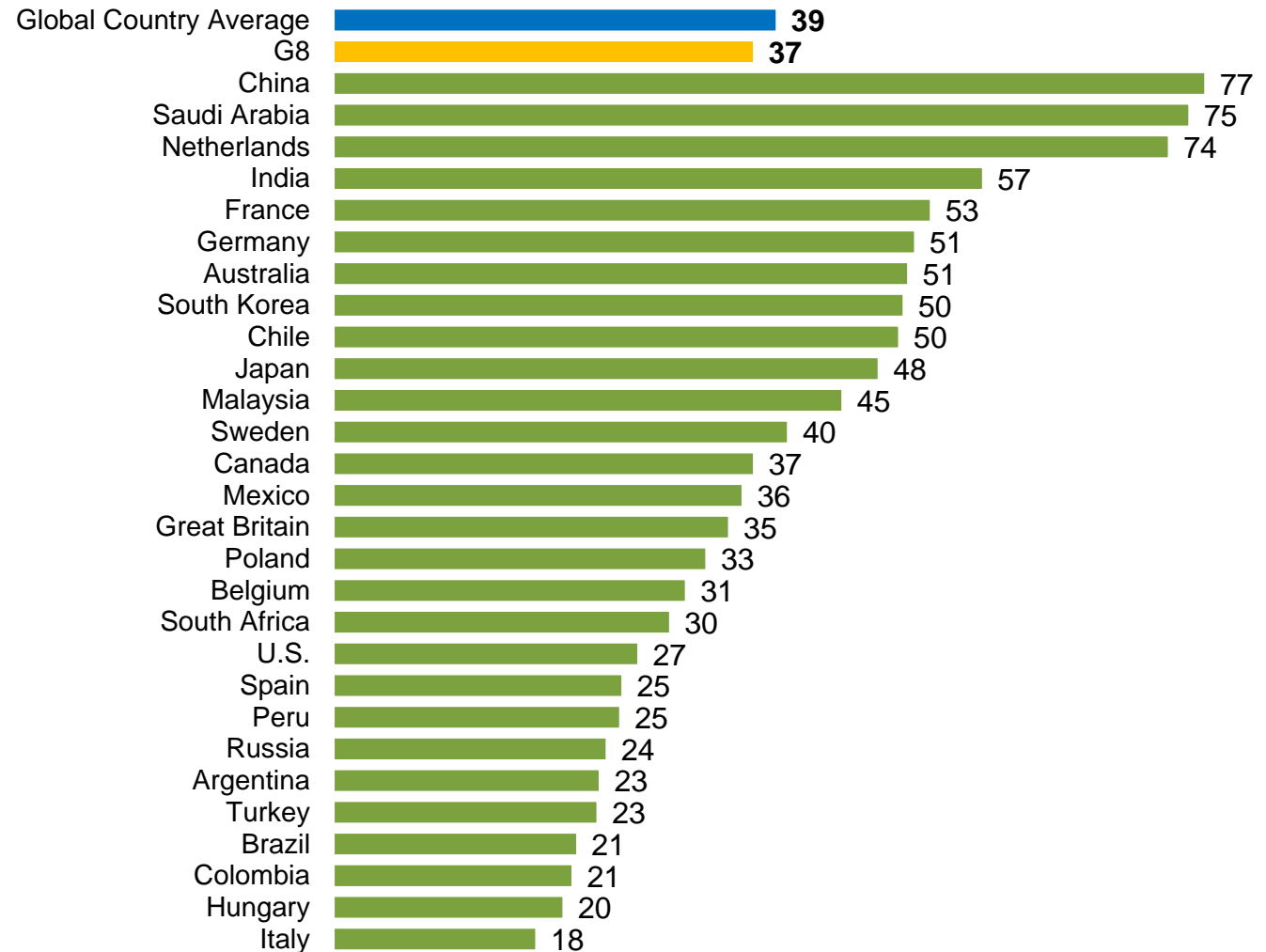
THERE IS CONSIDERABLE VARIATION IN SATISFACTION LEVELS ACROSS THE 28 COUNTRIES

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?

% 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/GIA
Base: 19,514 adults (online), July-August 2021

SATISFACTION IS RELATIVELY LOW IN N. AMERICA AND LATAM

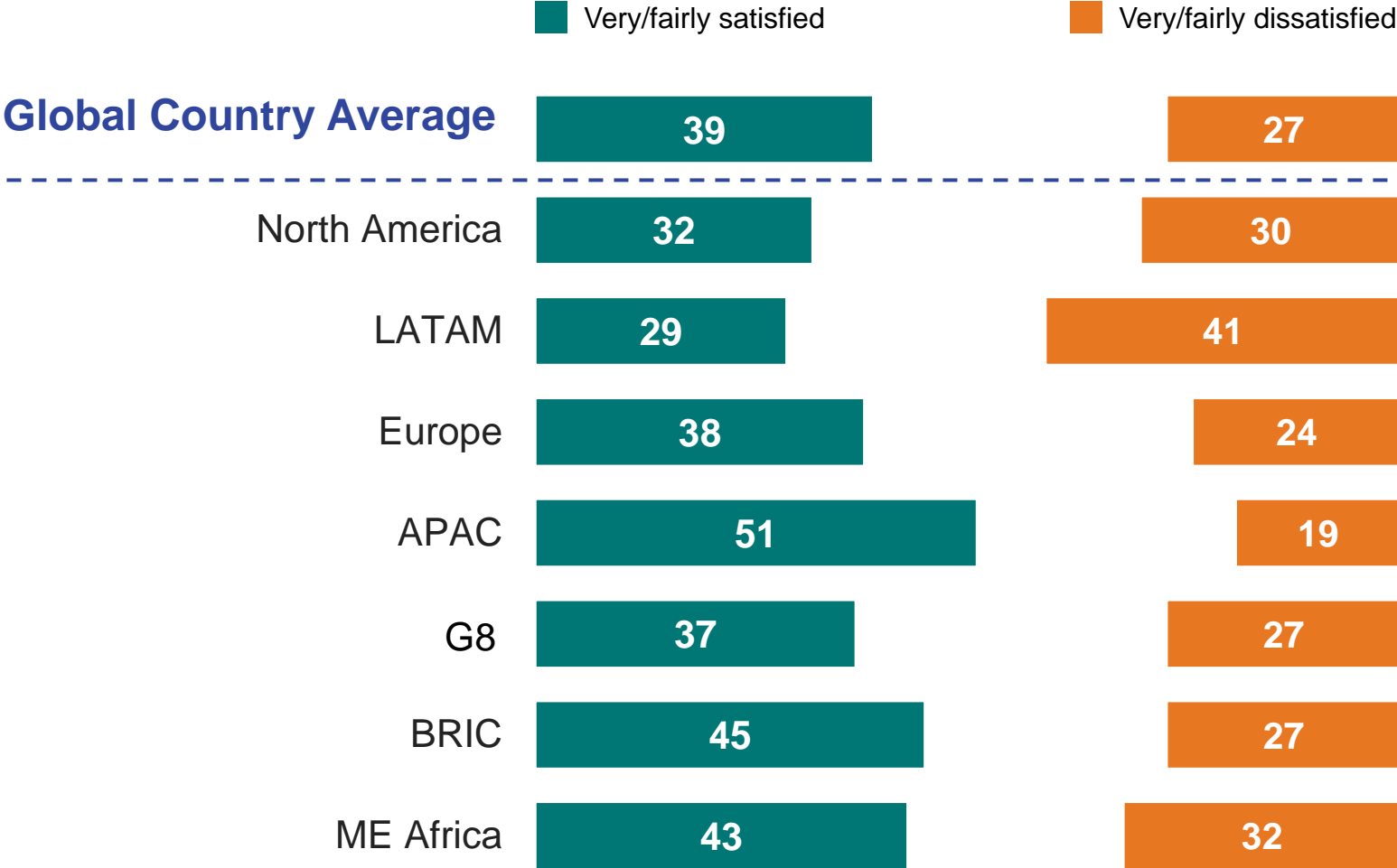
Q. We now want you to think about [COUNTRY'S] infrastructure. By infrastructure we mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

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



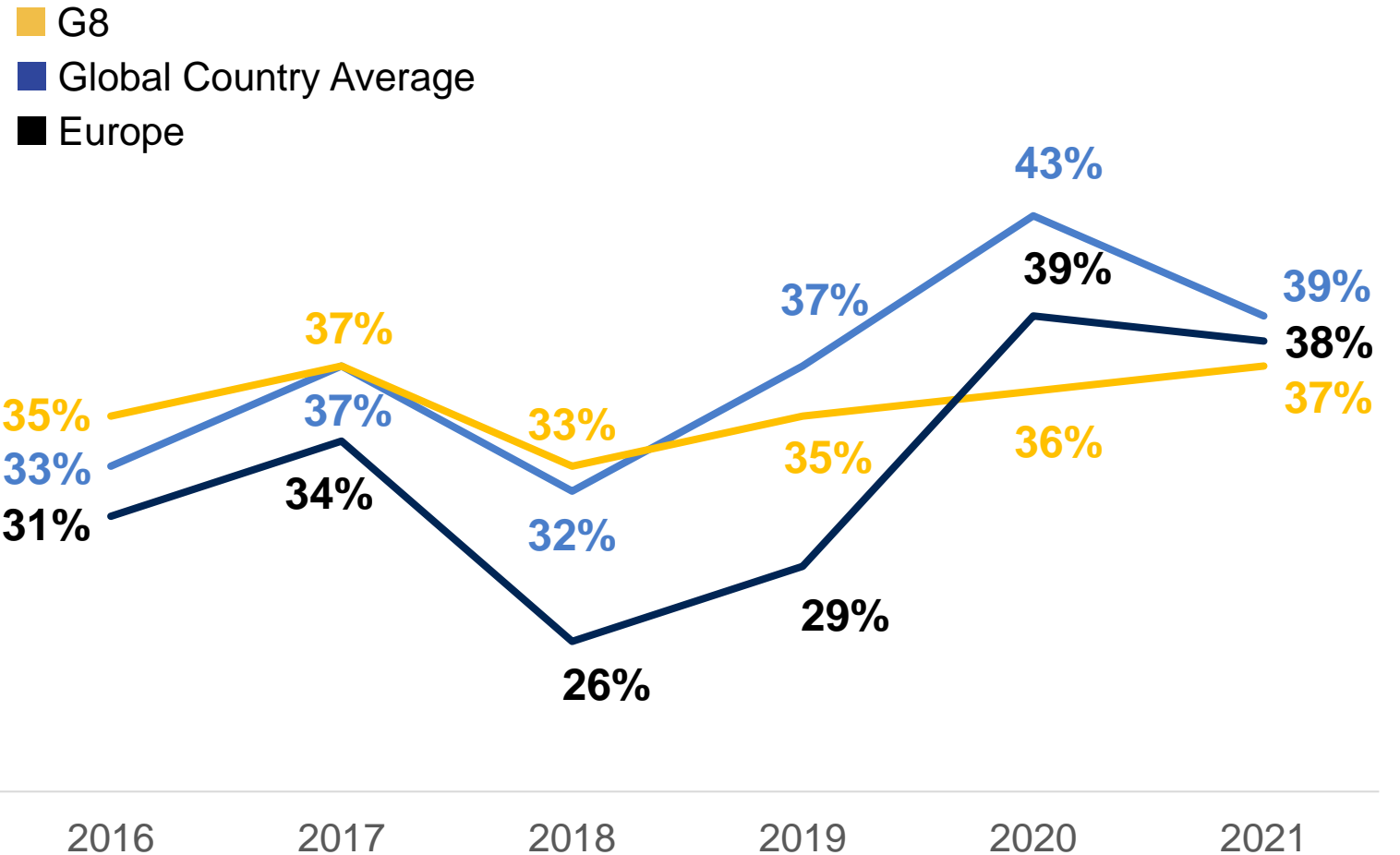
LONGER-TERM TRENDS: SATISFACTION DIPPED IN 2018 BUT BOUNCED BACK

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.

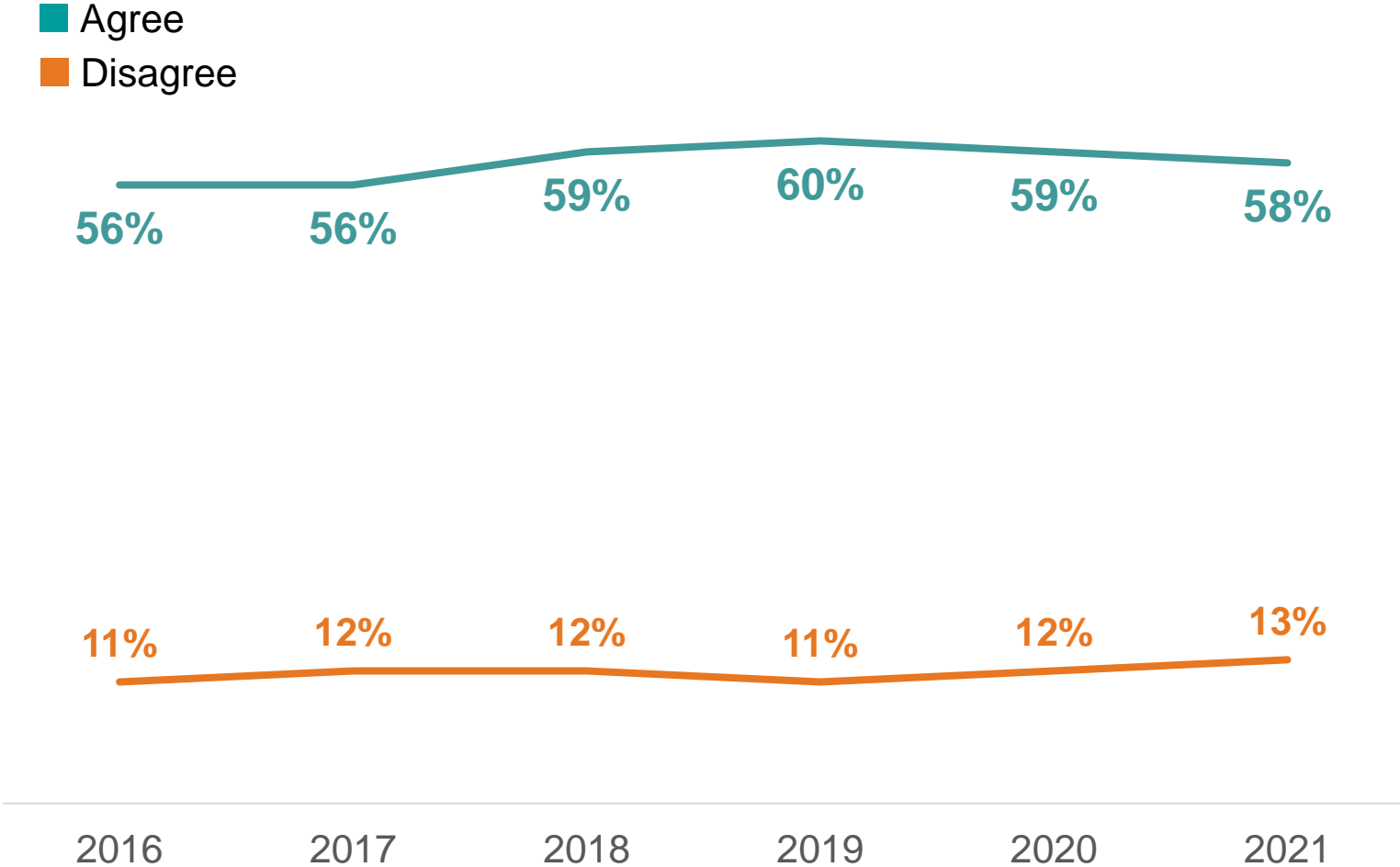


Source: Ipsos/GIIA
Base: 19,514 adults (online), July-August 2021

INFRASTRUCTURE CONTINUES TO BE AN AREA WHERE THE PUBLIC FEEL MORE CAN 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/GIA
Base: 19,514 adults (online), July-August 2021



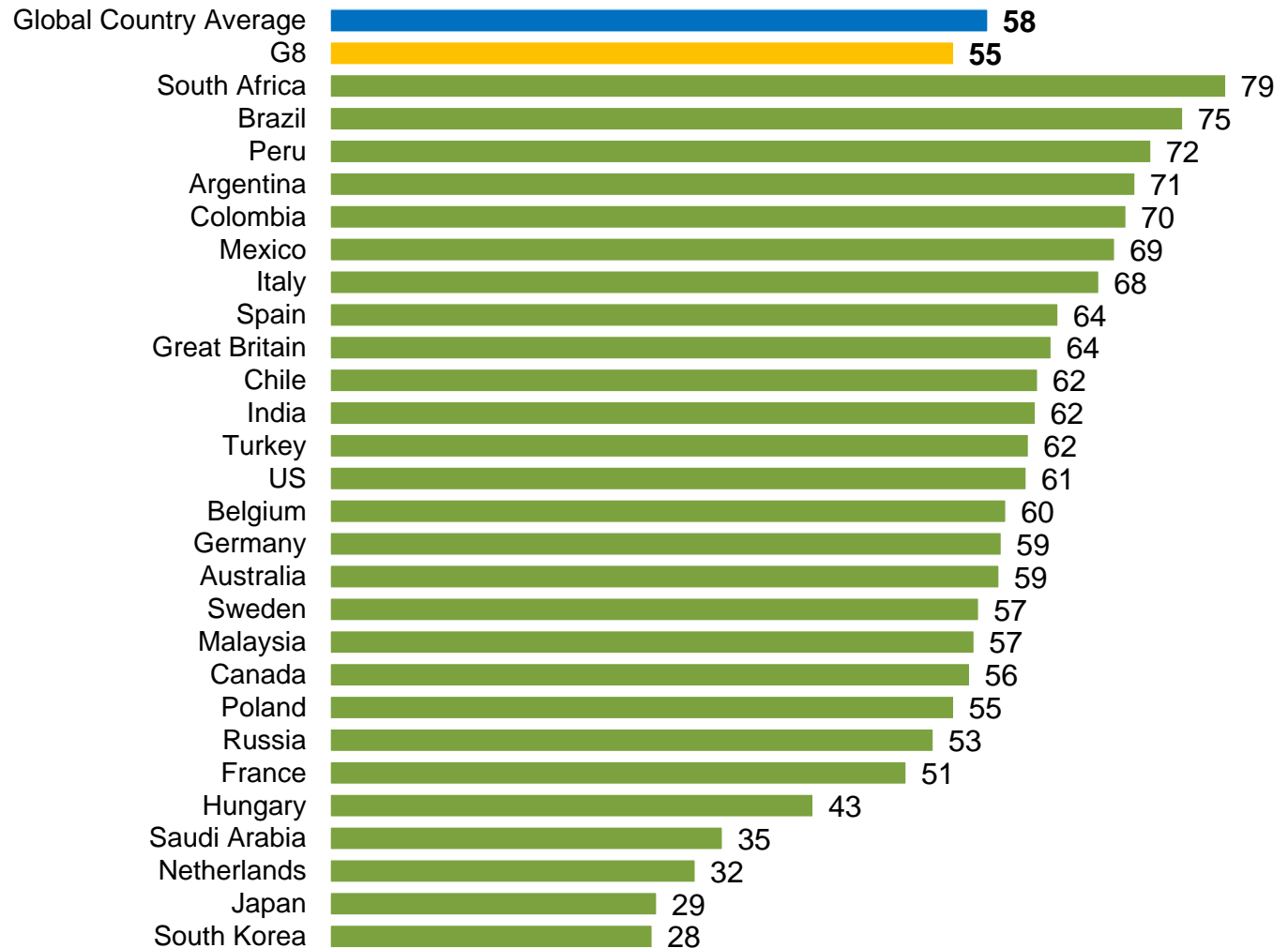
A MAJORITY IN MOST COUNTRIES AGREE ‘NOT ENOUGH IS BEING DONE’

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/GIA
Base: 1,000 GB adults among 19,514 (online), July-August 2021

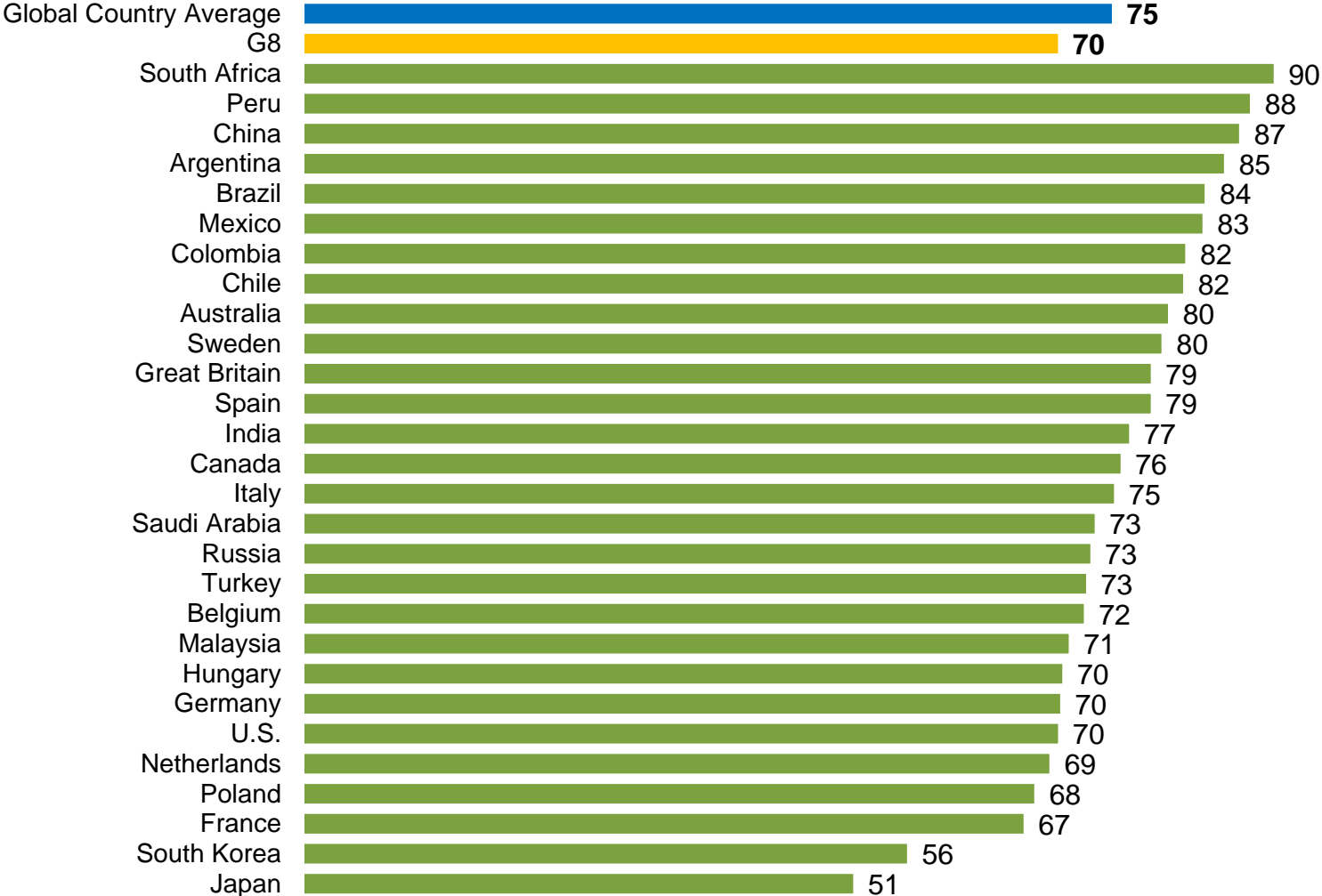
AS LAST YEAR, IT IS FELT THAT INVESTMENT WILL CREATE JOBS AND PROVIDE AN ECONOMIC BOOST

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”

% 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/GIA
 Base: 1,000 GB adults among 19,514 (online), July-August 2021

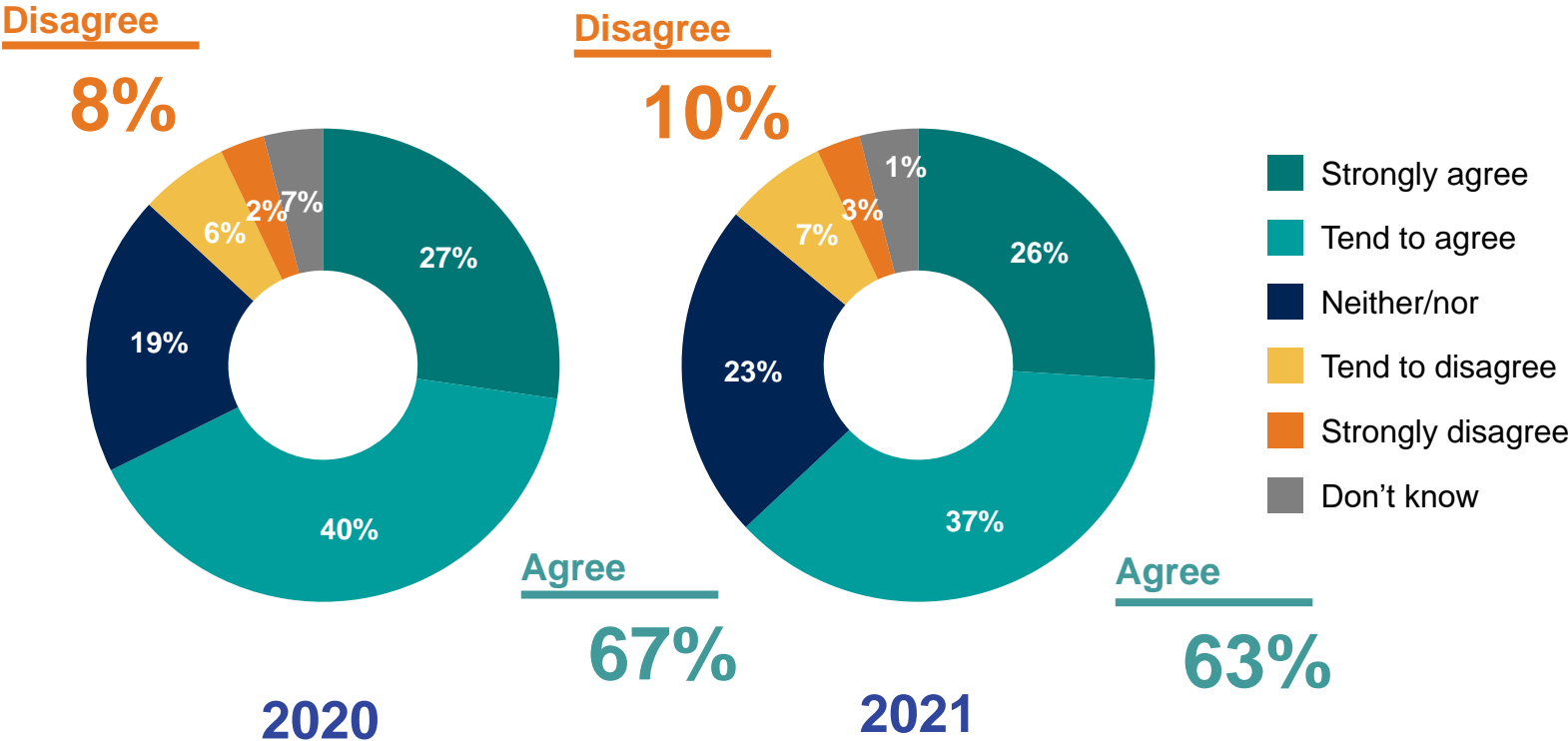


IT'S STILL THE CASE THAT A CLEAR MAJORITY ARE COMFORTABLE WITH PRIVATE SECTOR INVESTMENT

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”

Global Country Average



Source: Ipsos/GIA
 Base: 1,000 GB adults among 19,514 (online), July-August 2021



PRIORITIES AND PREFERENCES

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

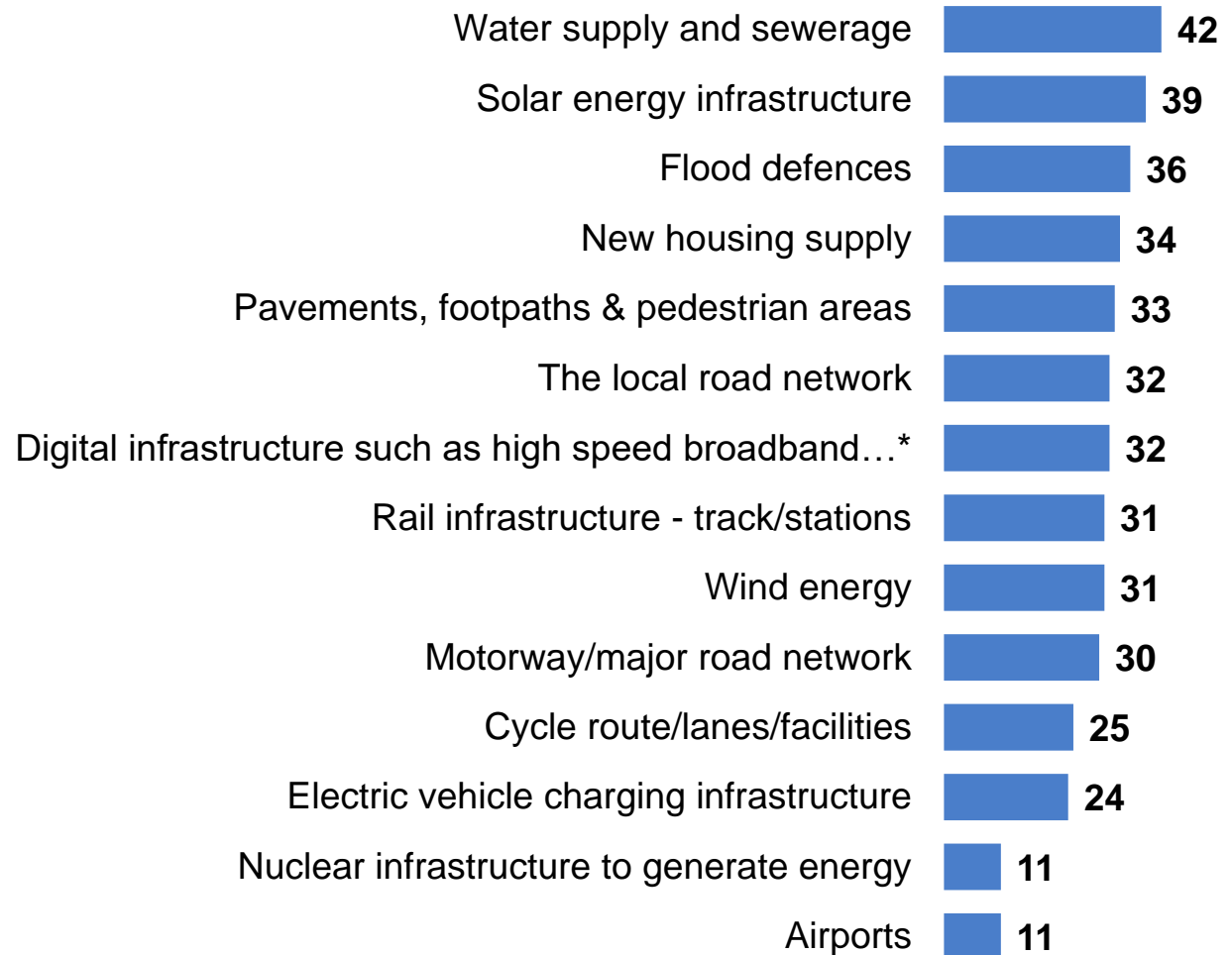
Q. Which of these types of infrastructure, if any, do you think should be made a priority for investment for...
[COUNTRY]?

% 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



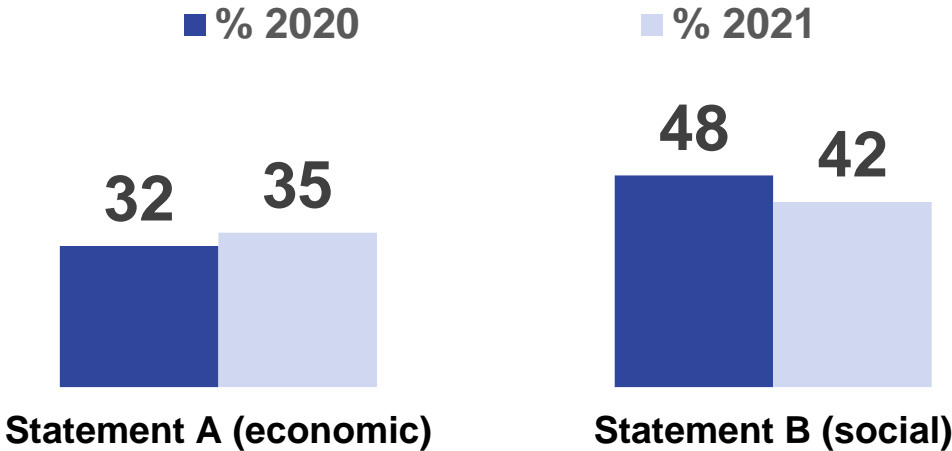
PLURALITY PREFERENCE FOR SOCIAL VS ECONOMIC INFRASTRUCTURE BUT THIS HAS WEAKENED

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.”

% strongly/tend to prefer each statement

Global Country Average



Source: Ipsos/GIA
Base: 1,000 GB adults among 19,514 (online), July-August 2021

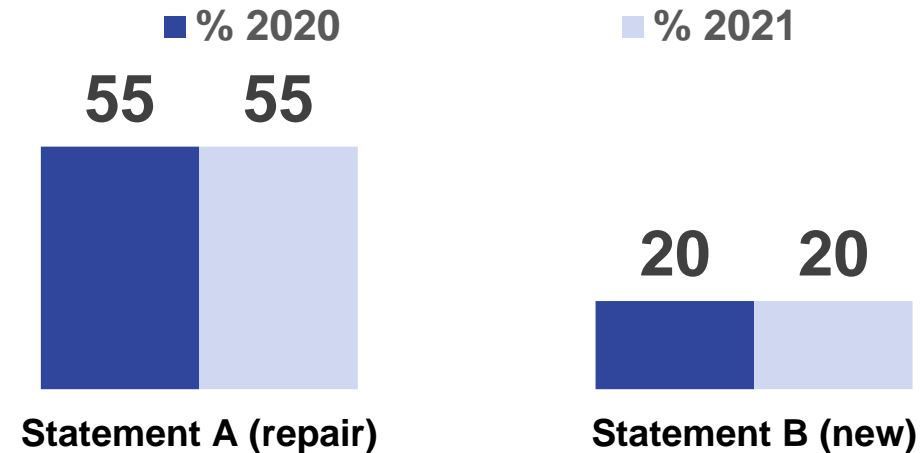
CONTINUED PREFERENCE TO MAINTAIN/REPAIR RATHER THAN BUILD NEW

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.”

% strongly/tend to prefer each statement

Global Country Average



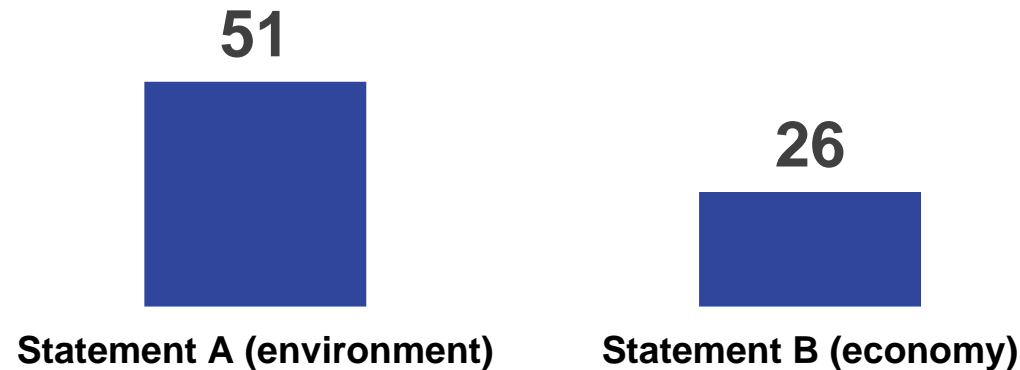
Source: Ipsos/GIIA
Base: 1,000 GB adults among 19,514 (online), July-August 2021

PEOPLE PRIORITISE CONSIDERING ENVIRONMENTAL IMPACTS OVER ECONOMIC ONES

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



Source: Ipsos/GIIA
Base: 1,000 GB adults among 19,514 (online), July-August 2021

THE ENVIRONMENT AND QUALITY ARE TOP PRIORITIES

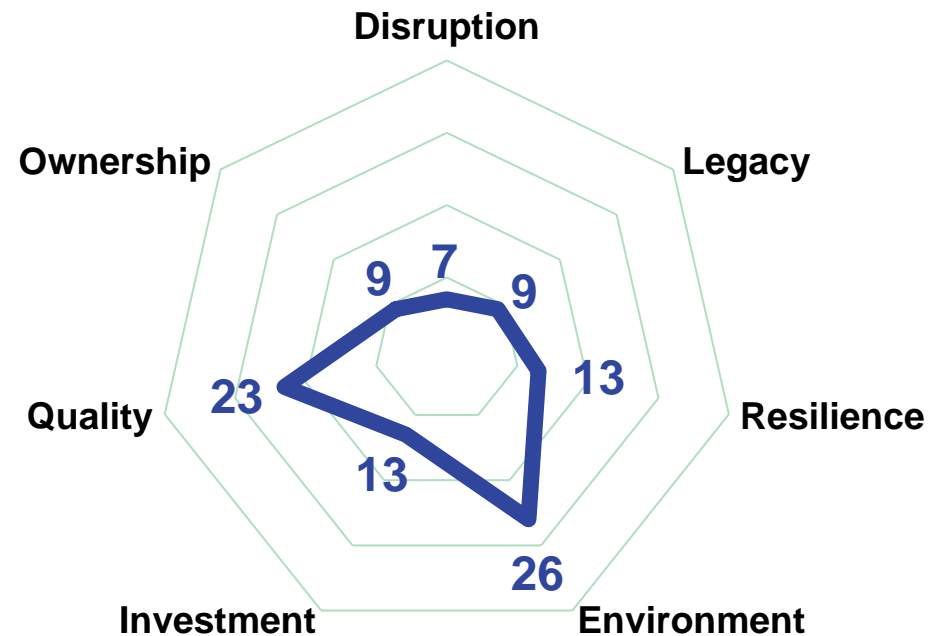
Q. Which of the following factors do you think are the most important for [COUNTRY] to consider when putting together plans for infrastructure in the future? Please rank the following...

% 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: 1,000 GB adults among 19,514 (online), July-August 2021

OWNERSHIP, DISRUPTION AND LEGACY ARE RELATIVELY LOW PRIORITIES

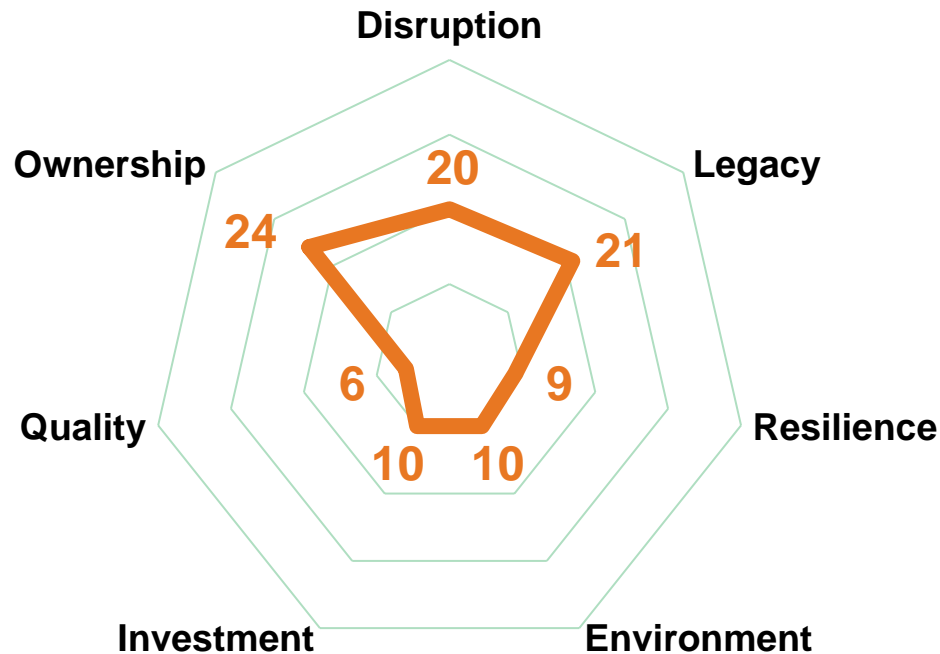
Q. Which of the following factors do you think are the most important for [COUNTRY] to consider when putting together plans for infrastructure in the future? Please rank the following...

% 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

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: 1,000 GB adults among 19,514 (online), July-August 2021

TECHNICAL DETAILS

METHODOLOGY

- **2021:** 28 countries, **19,514** participants, **23 July–6 August 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*
- 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 18-64 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 2016-2020 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/en/global-infrastructure-index-2020> (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/en/global-infrastructure-index-september-2017> (2017) - 28 countries

<https://www.ipsos.com/en/global-infrastructure-public-satisfaction-and-priorities> (2016) - 26 countries

ONLINE SURVEY, 28 COUNTRIES, 23 JULY-6 AUGUST

- 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

N. America

2,002

Canada

U.S.A.

LATAM

3,503

Argentina

Brazil

Chile

Colombia

Mexico

Peru

APAC

4,506

Australia

China

India

Japan

Malaysia

South Korea

G8

7,504

Canada

France

Germany

Great Britain

Italy

Japan

Russia

U.S.A.

BRIC

3,005

Brazil

Russia

India

China

ME Africa

1,501

Saudi Arabia

South Africa

Turkey

Source: Ipsos/GIIA

Base: 19,514 adults (online), July-August 2020/1



FURTHER INFORMATION



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