



Global Infrastructure Index

Public satisfaction and priorities – 2018

United States

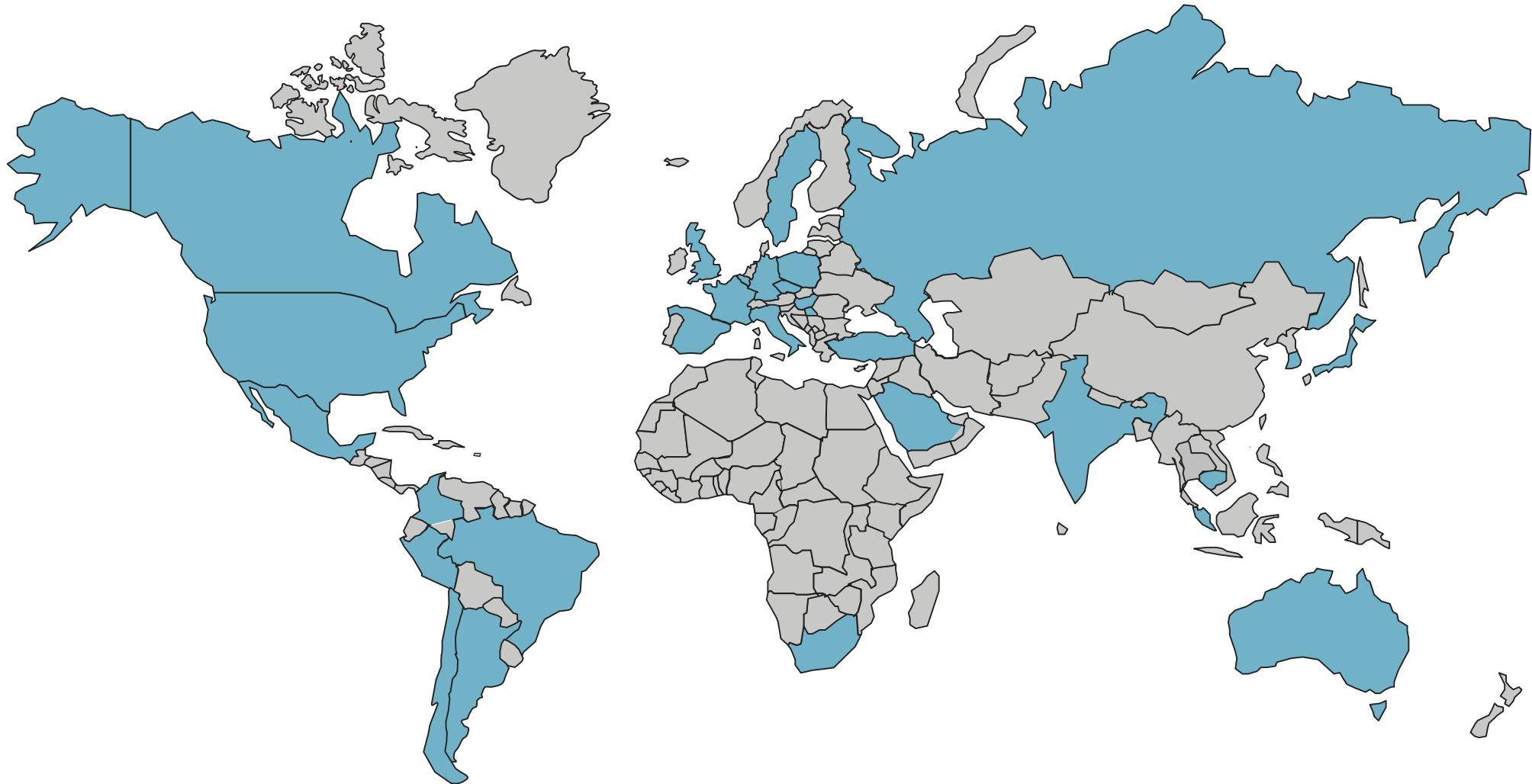
29 November 2018

GAME CHANGERS



Introduction

- These are the findings of the third **Global Infrastructure Index** conducted via Ipsos' Global @dvisor between **August 24 – September 7, 2018** in **28 countries** around the world via the Ipsos Online Panel system and involving **19,786** participants:

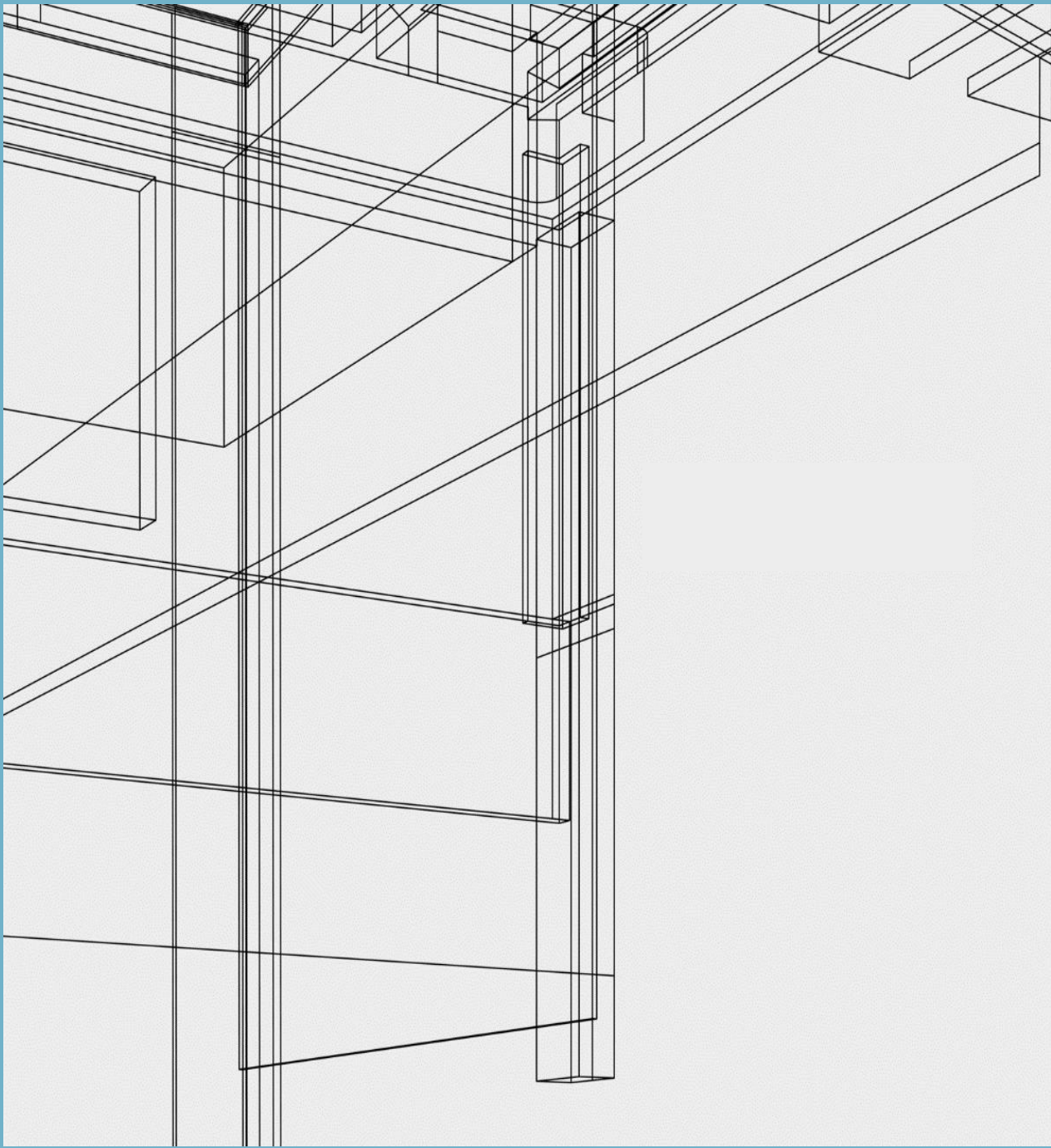


Methodology

- 28 countries, **19,786** participants:
Argentina, Australia*, Belgium, Brazil, Canada*, Chile, Colombia, France*, Germany*, Great Britain*, Hungary, India*, Italy*, Japan*, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Serbia, Spain*, Sweden, Turkey and **the United States of America (1,000)***
** 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' data.
- Participants were adults **aged 18-64 in the US** and Canada, 18-65 in Czech Republic, and 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 in the Czech Republic, but results for this country are **not** included in Global totals.
- A selection of trends is included. Further information (with an American focus) is available:

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

<https://www.ipsos.com/en-us/news-polls/global-infrastructure-index-2017> (2017)



**Overall
ratings**

Trends: Overall ratings

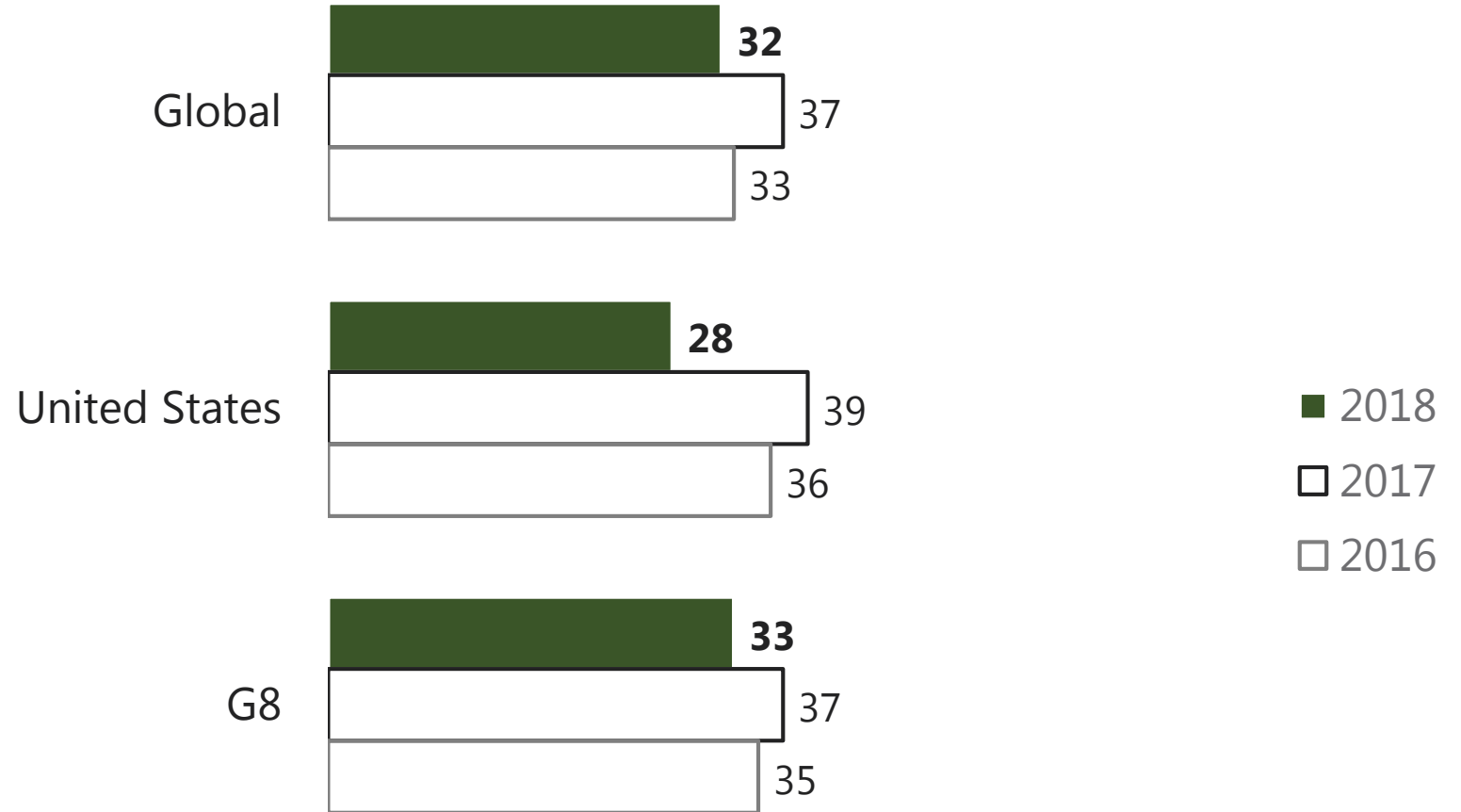
Q. I now want you to think about [COUNTRY'S] infrastructure.

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

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.



Source: Ipsos Public Affairs

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

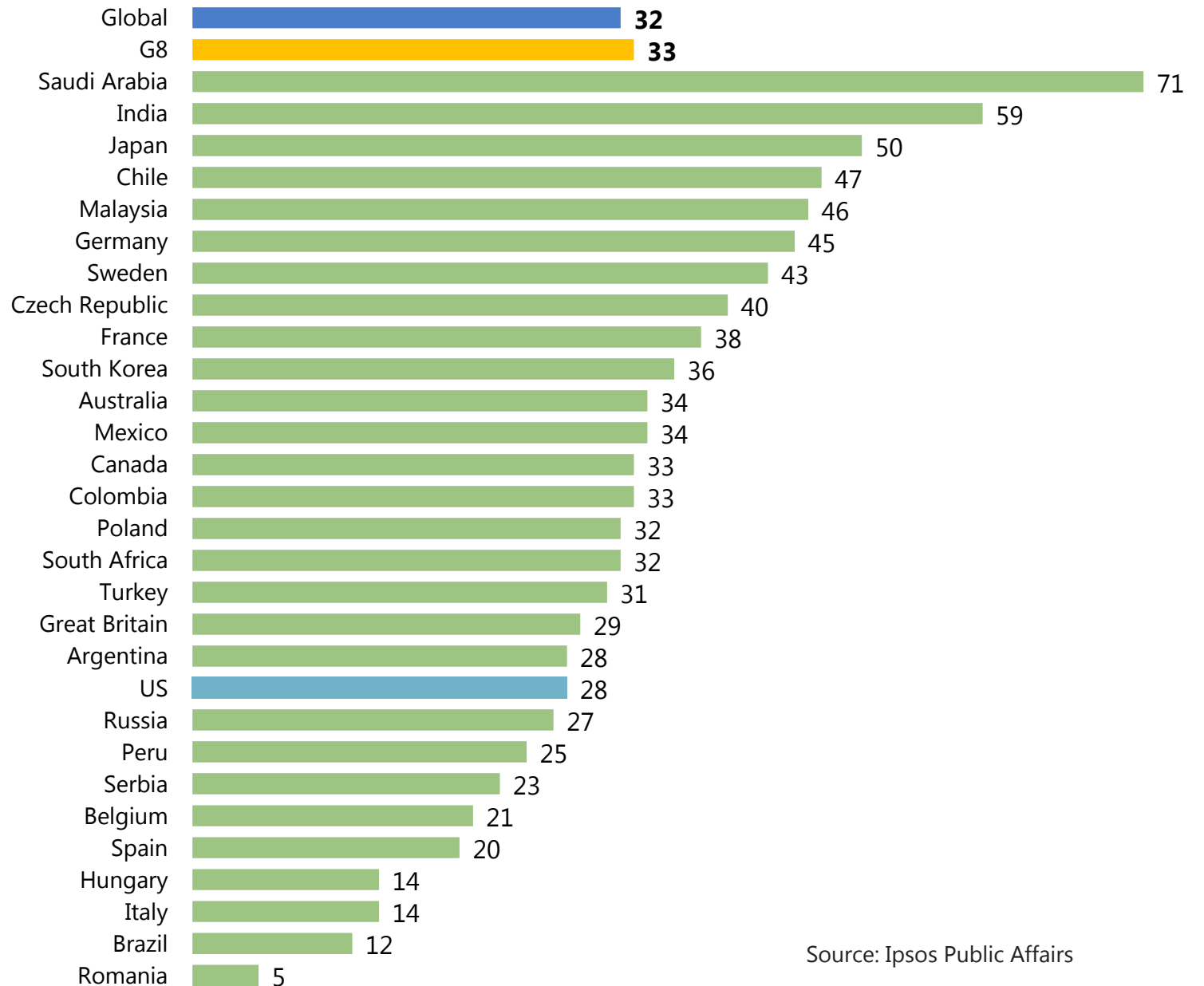
Global: Overall

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



Source: Ipsos Public Affairs

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

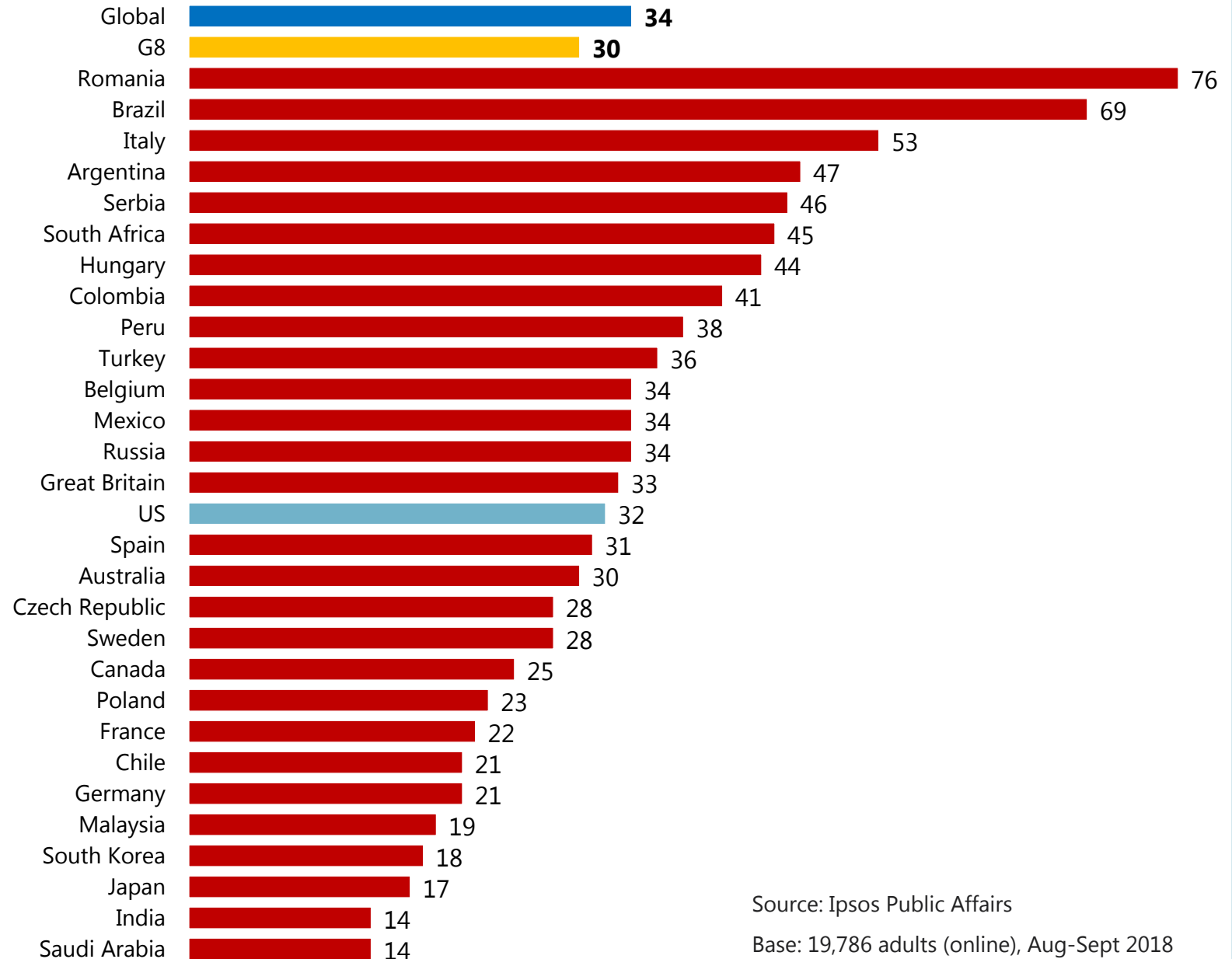
Global: Overall

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 dissatisfied



Source: Ipsos Public Affairs

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

Trends: Overall

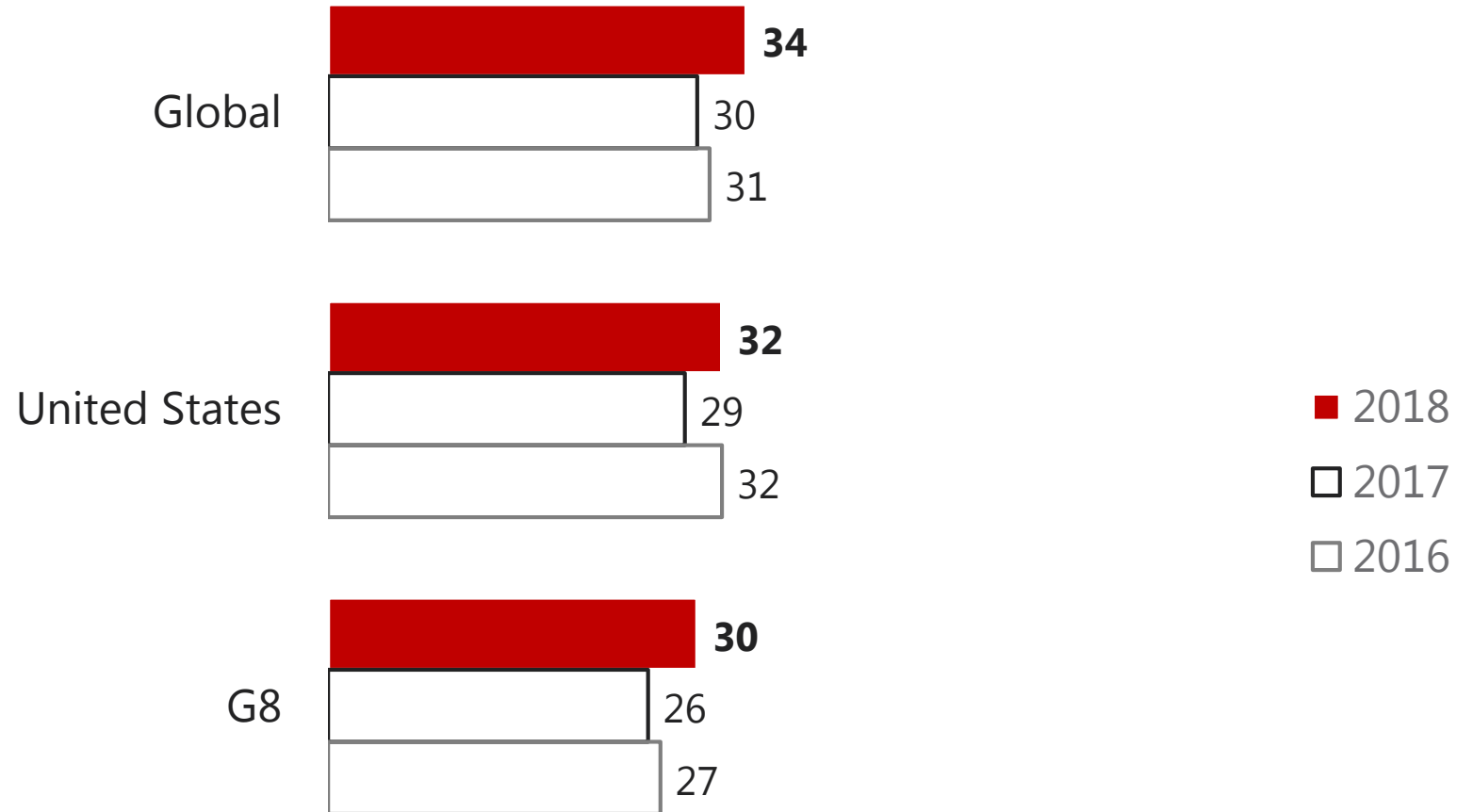
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% very/fairly dissatisfied

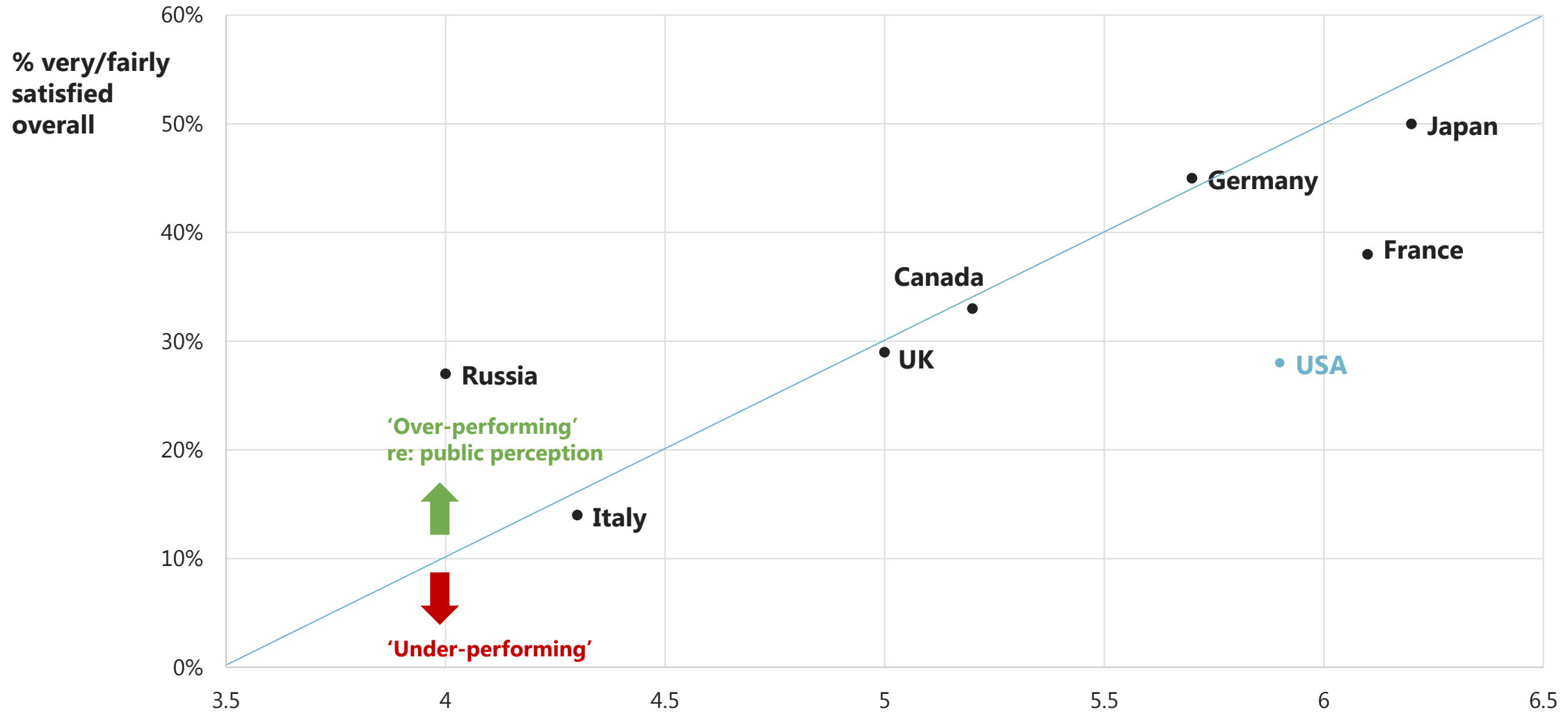
The 2016-18 surveys used the same methodology, but the profile of participating countries changed between years. This means that the **global and regional trends** do not always involve a strict like-for-like comparison.



Source: Ipsos Public Affairs

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

US and G8: Overall ratings v GCI



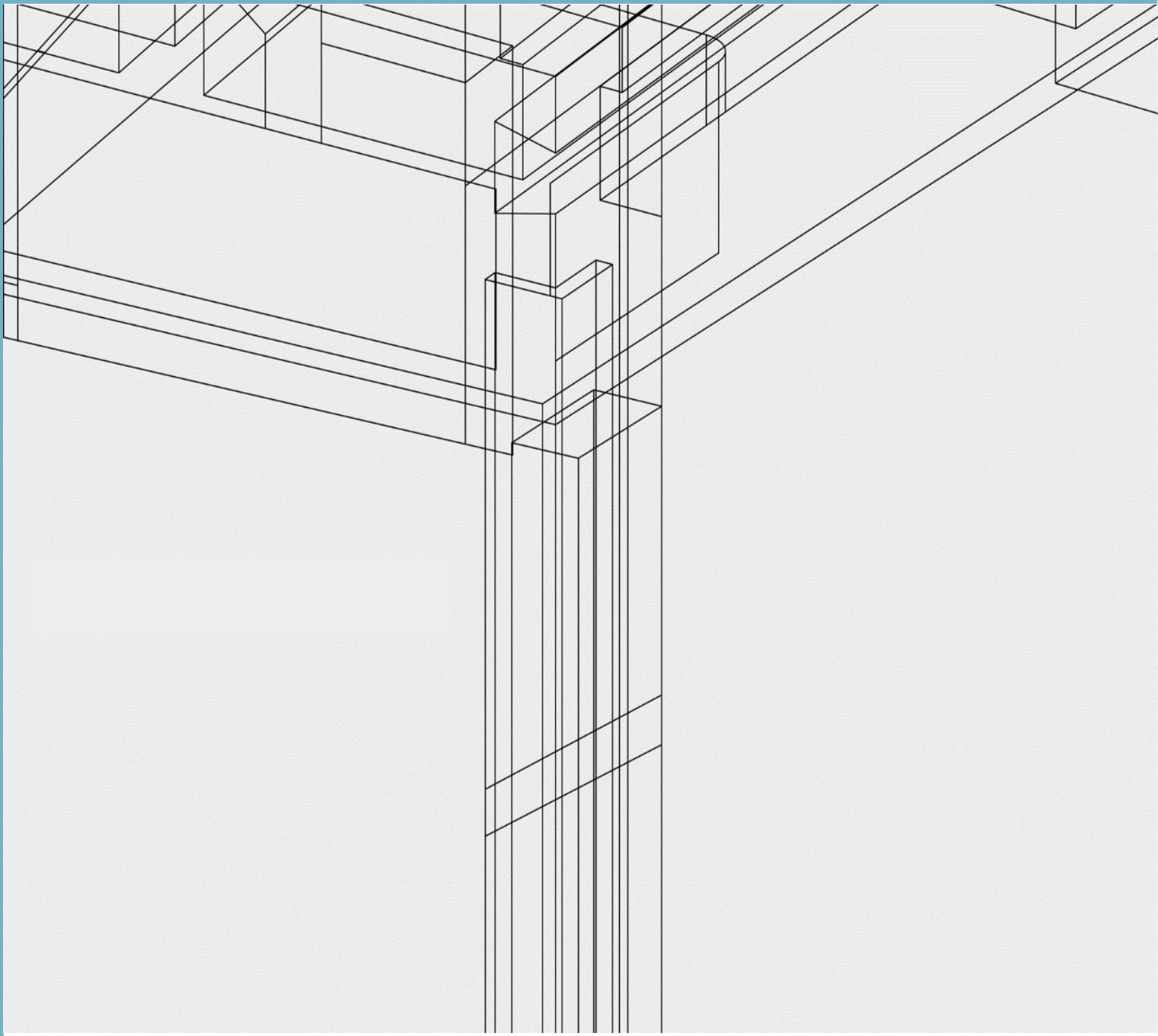
* Source: The World Economic Forum's Global Competitiveness Report 2017-2018. The chart shows the GCI rating (2.01) for "infrastructure overall" (1-7 where 7=best).

GCI - Global Competitiveness Index (2.01)*



Source: Ipsos Public Affairs

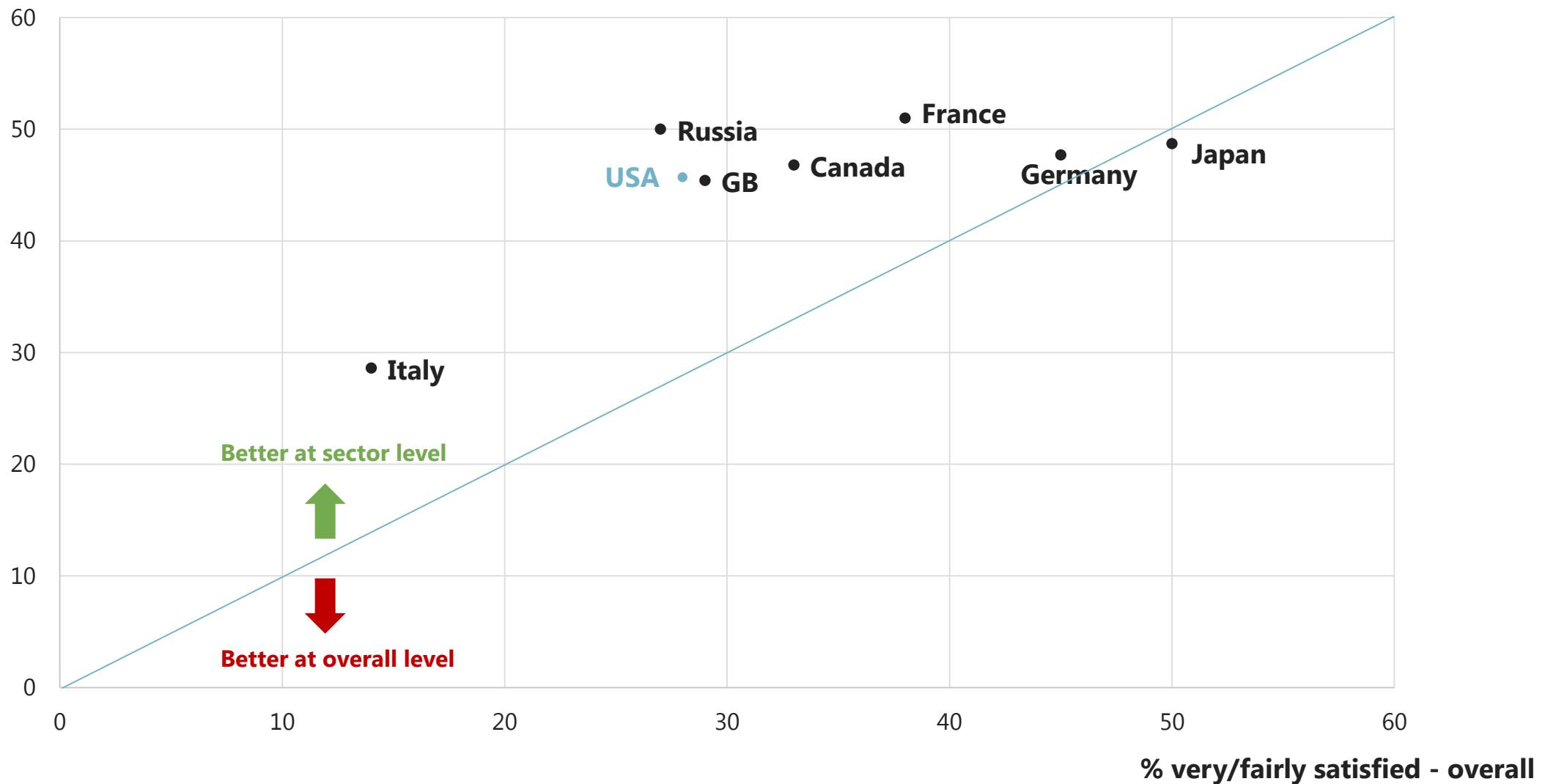
Base: 7,678 adults in G8 countries (online), Aug-Sept 2018



Sectors – ratings

US and G8: Overall ratings v average sector ratings

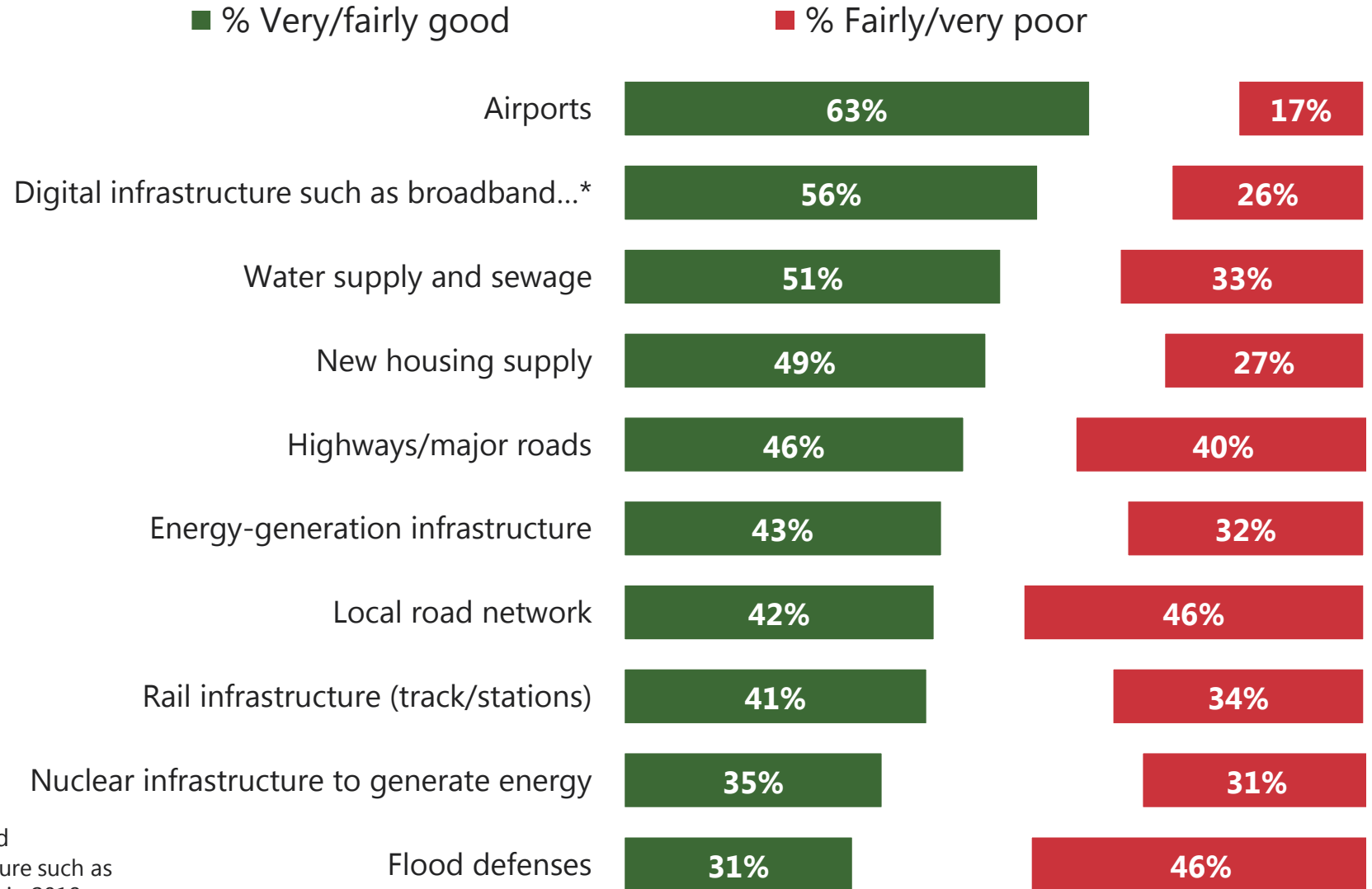
% very/fairly good - sector average



US: Sector ratings

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]...



* 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 Public Affairs

Ranked by % very/fairly good
Base: 1,000 US adults (online), Aug-Sept 2018

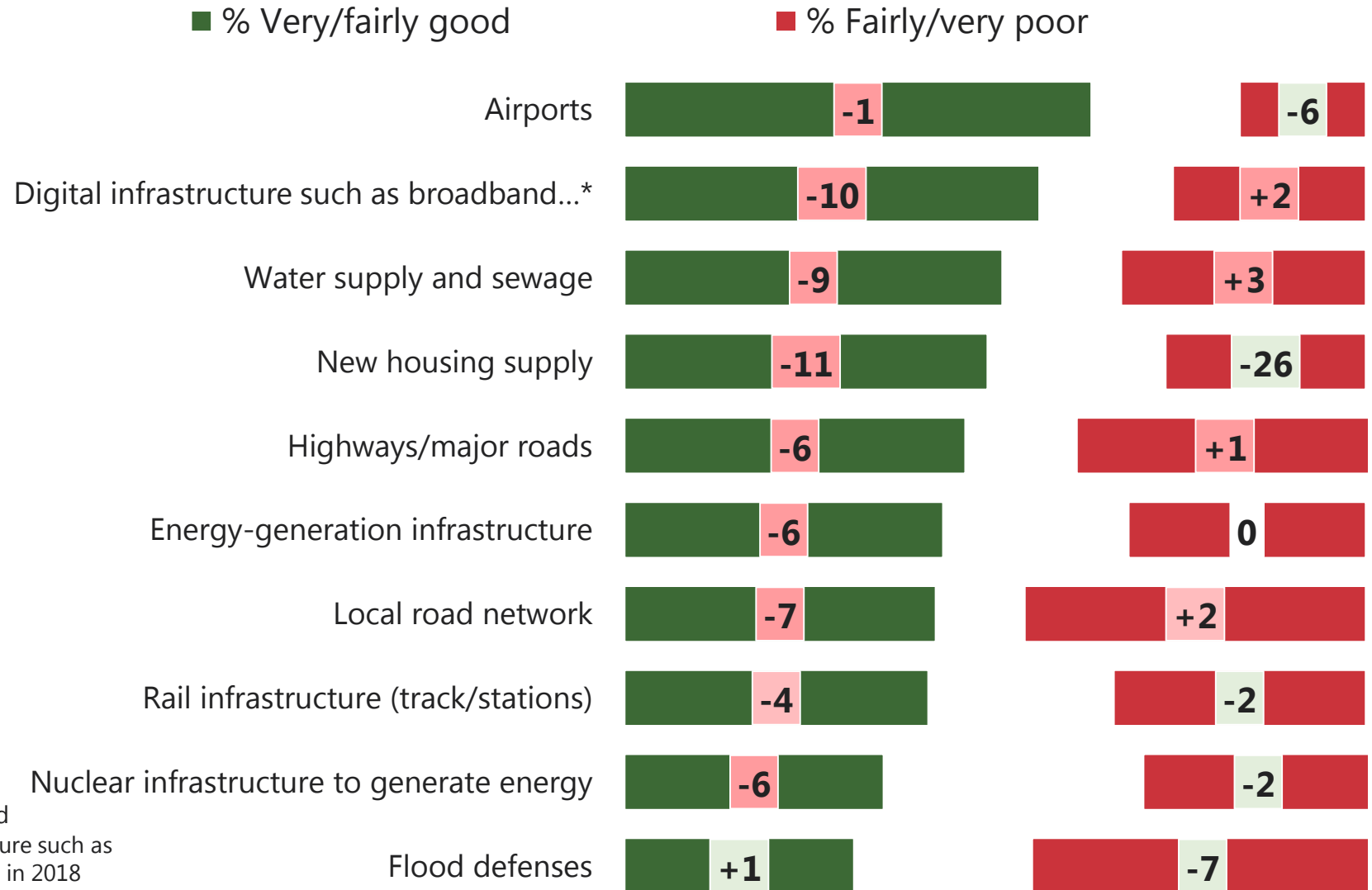
US: Sector ratings – trends

(vs 2017)

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]...

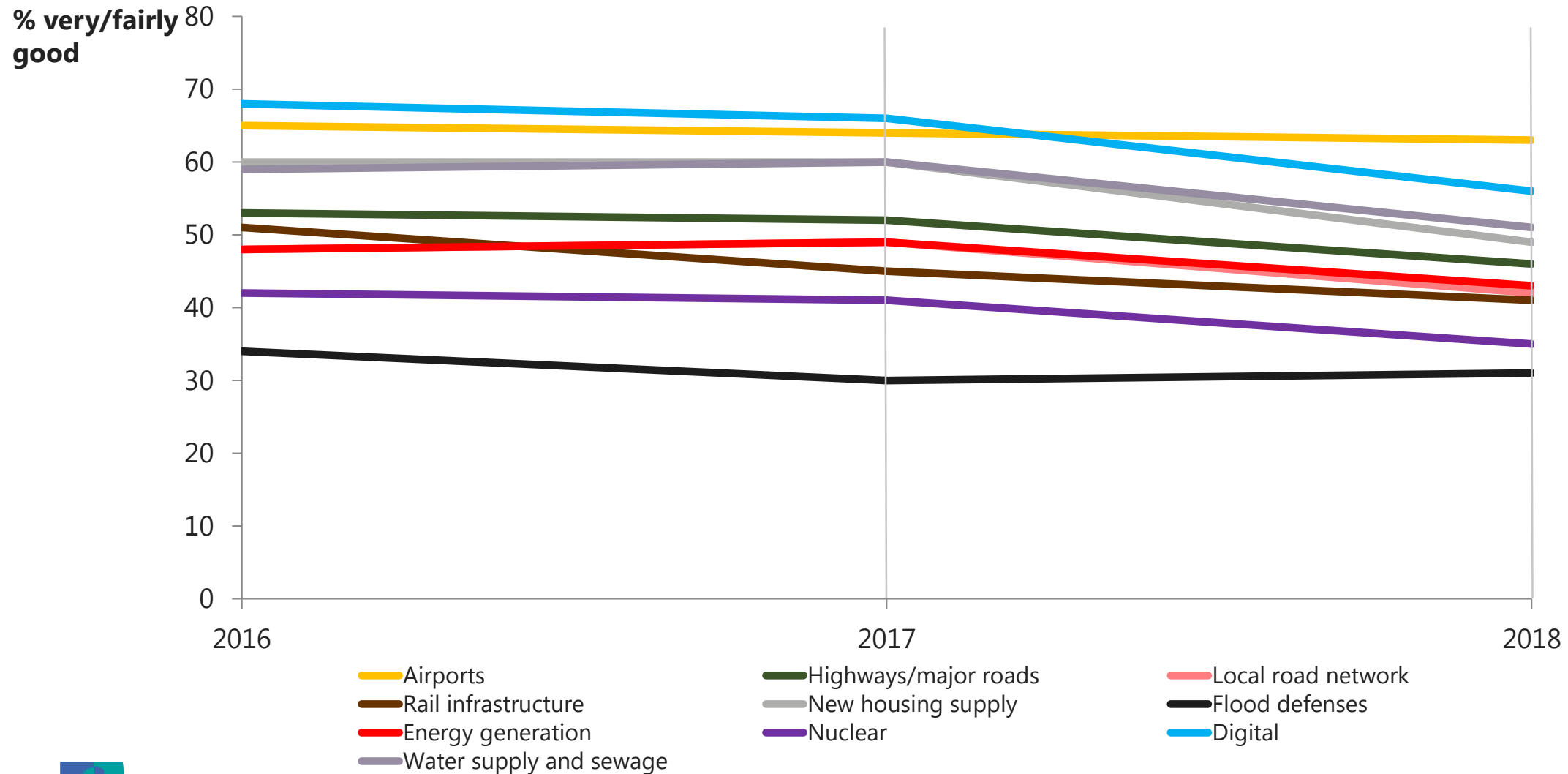
Bars represent % very/fairly good/poor as previous slide



* 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



US: Sector ratings – trends



Source: Ipsos Public Affairs

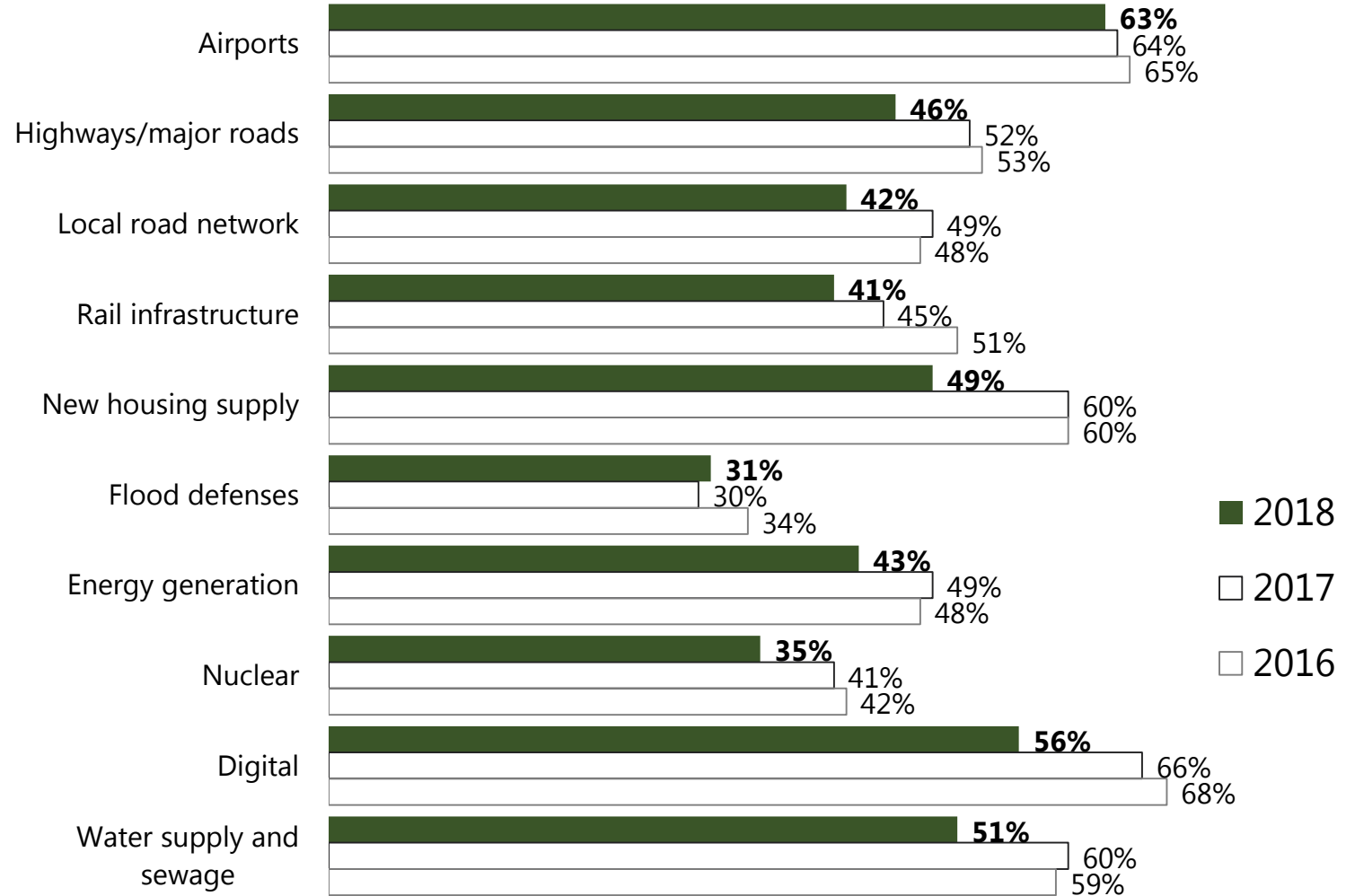
Base: 1,000 US adults (online), Aug-Sept 2018

US: 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



Ranked by % very/fairly good (2018)

Base: 1,000 US adults (online), Aug-Sept 2018



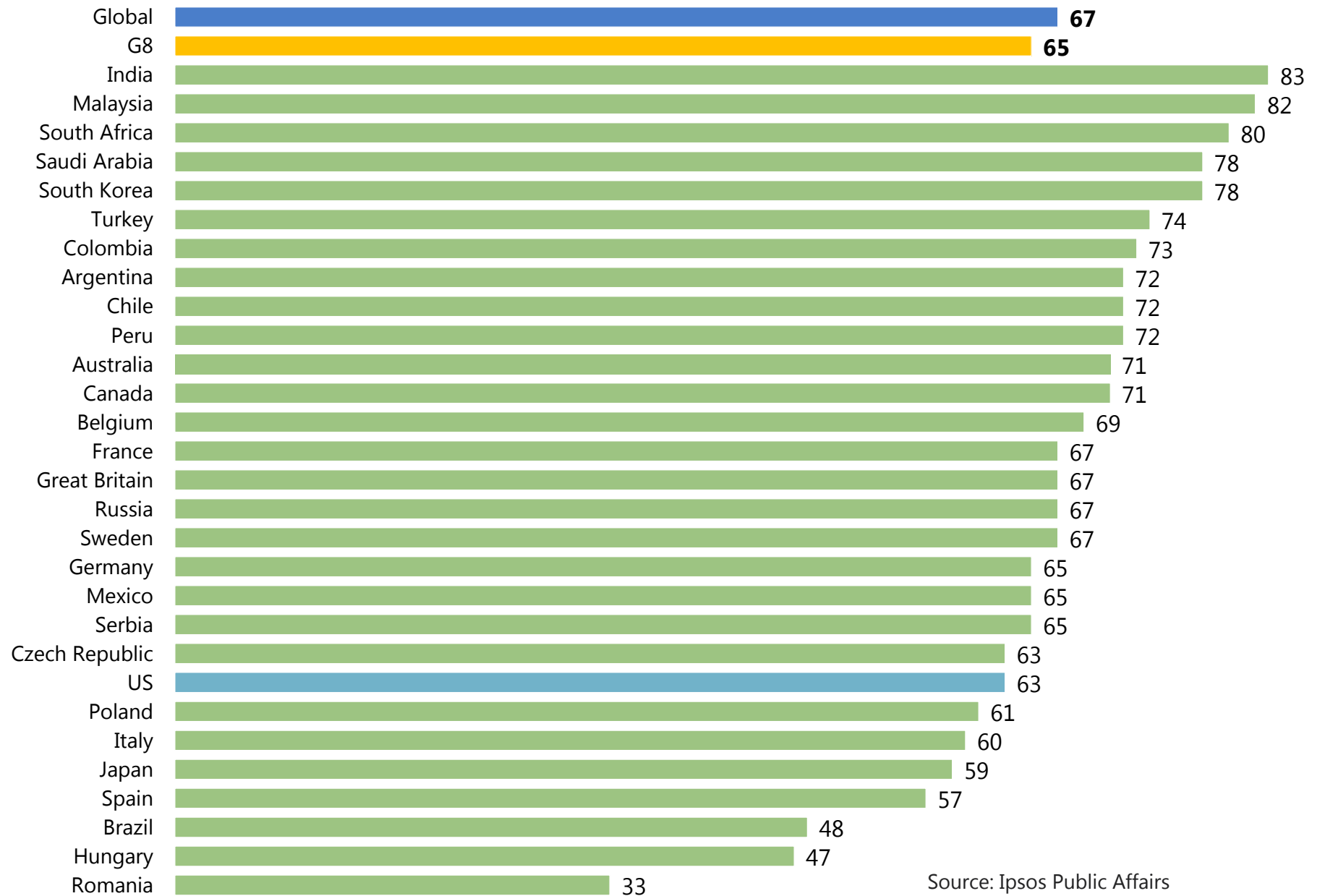
Source: Ipsos Public Affairs

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



Source: Ipsos Public Affairs

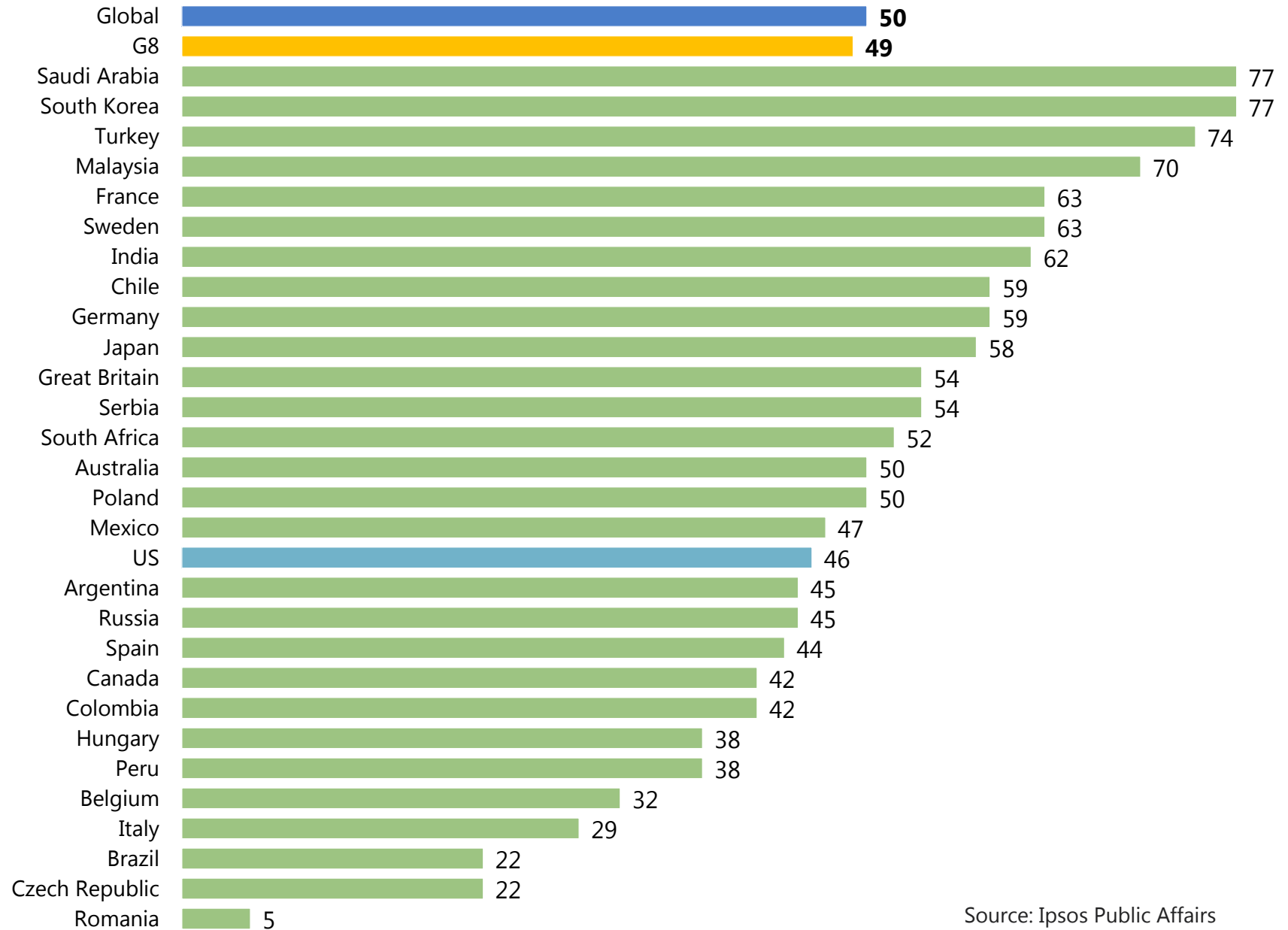
Base: 19,786 adults (online), Aug-Sept 2018

Highways

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]...

**Highways/
major roads**

% very/fairly good



Source: Ipsos Public Affairs

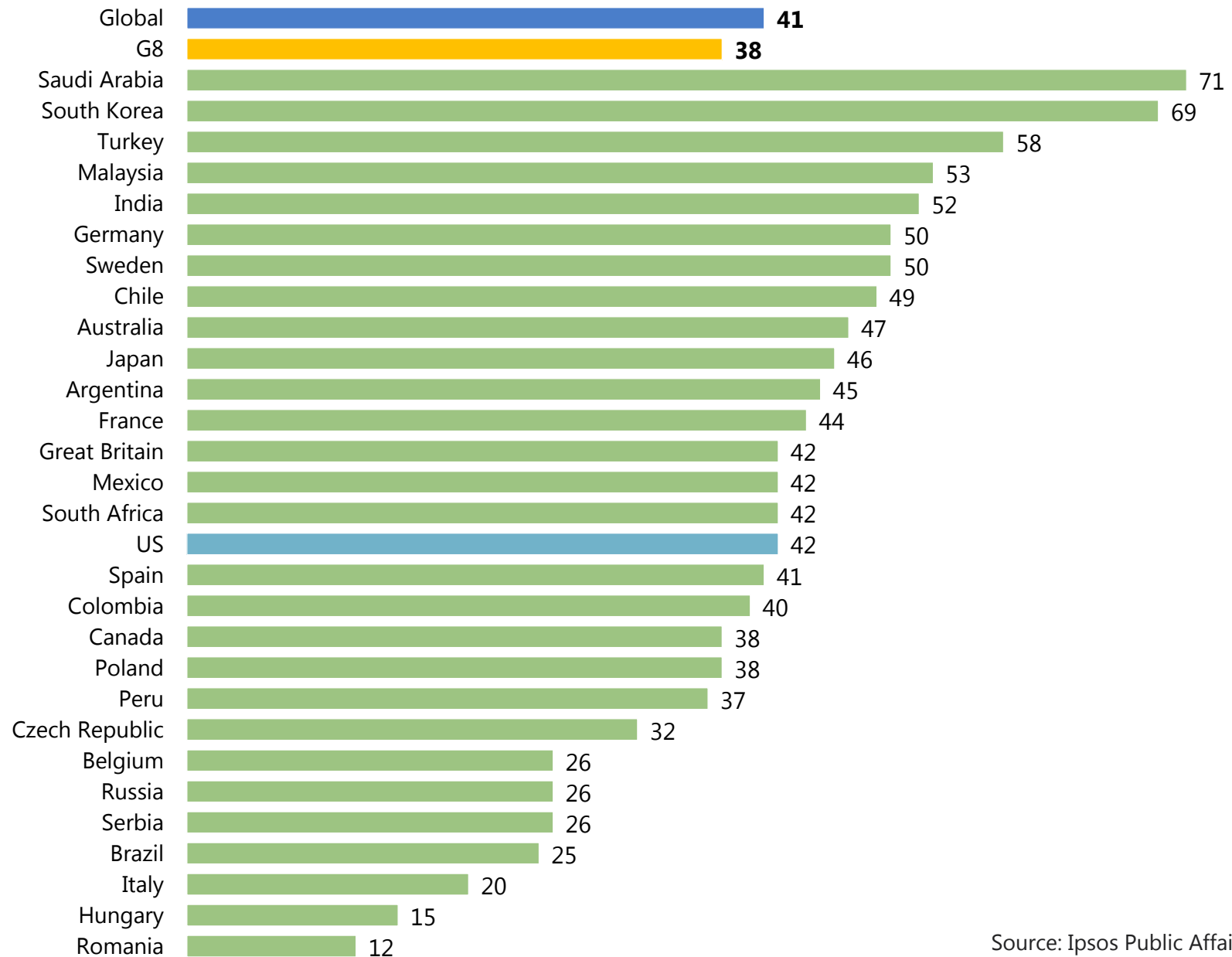
Base: 19,786 adults (online), Aug-Sept 2018

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



Source: Ipsos Public Affairs

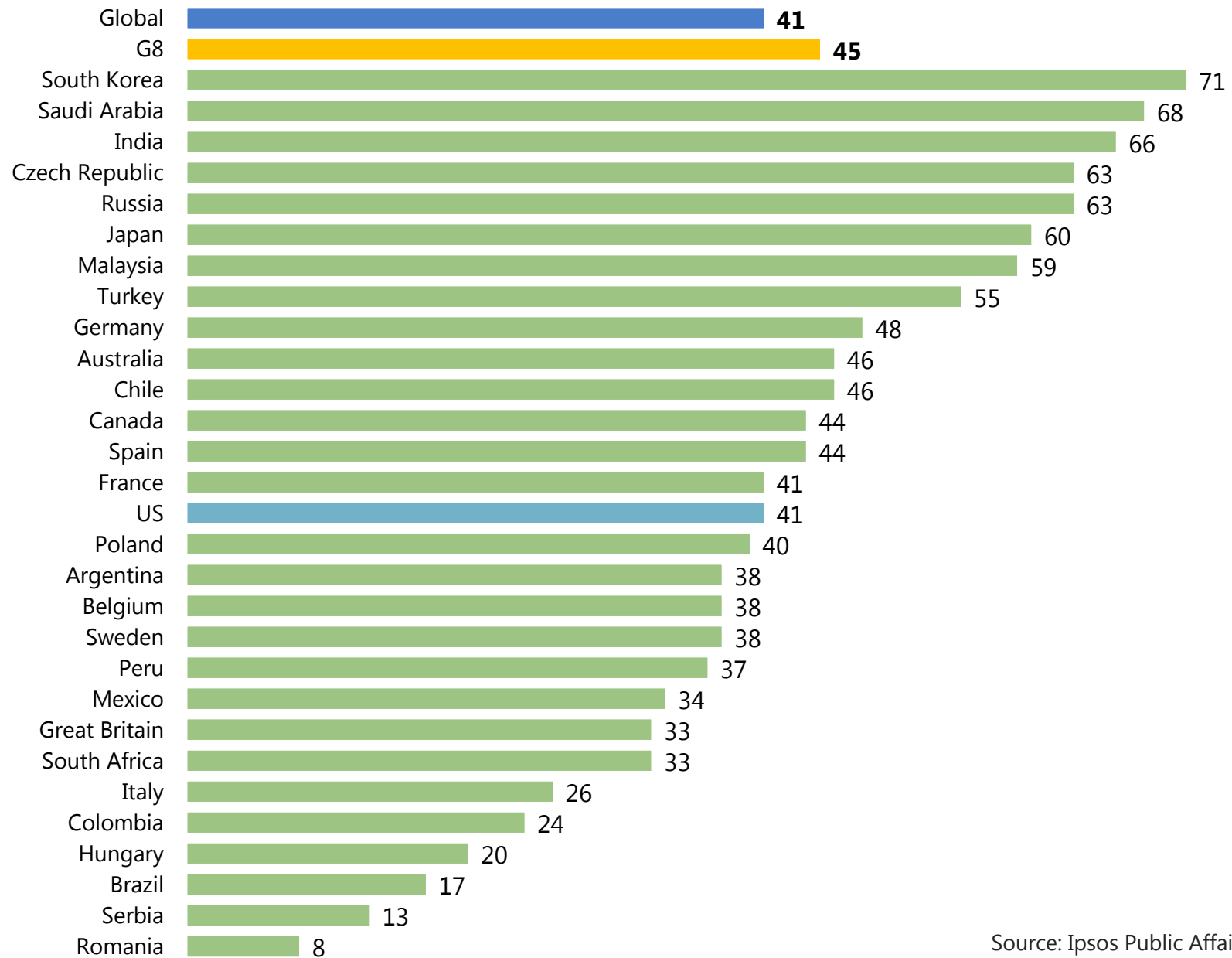
Base: 19,786 adults (online), Aug-Sept 2018

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



Source: Ipsos Public Affairs

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

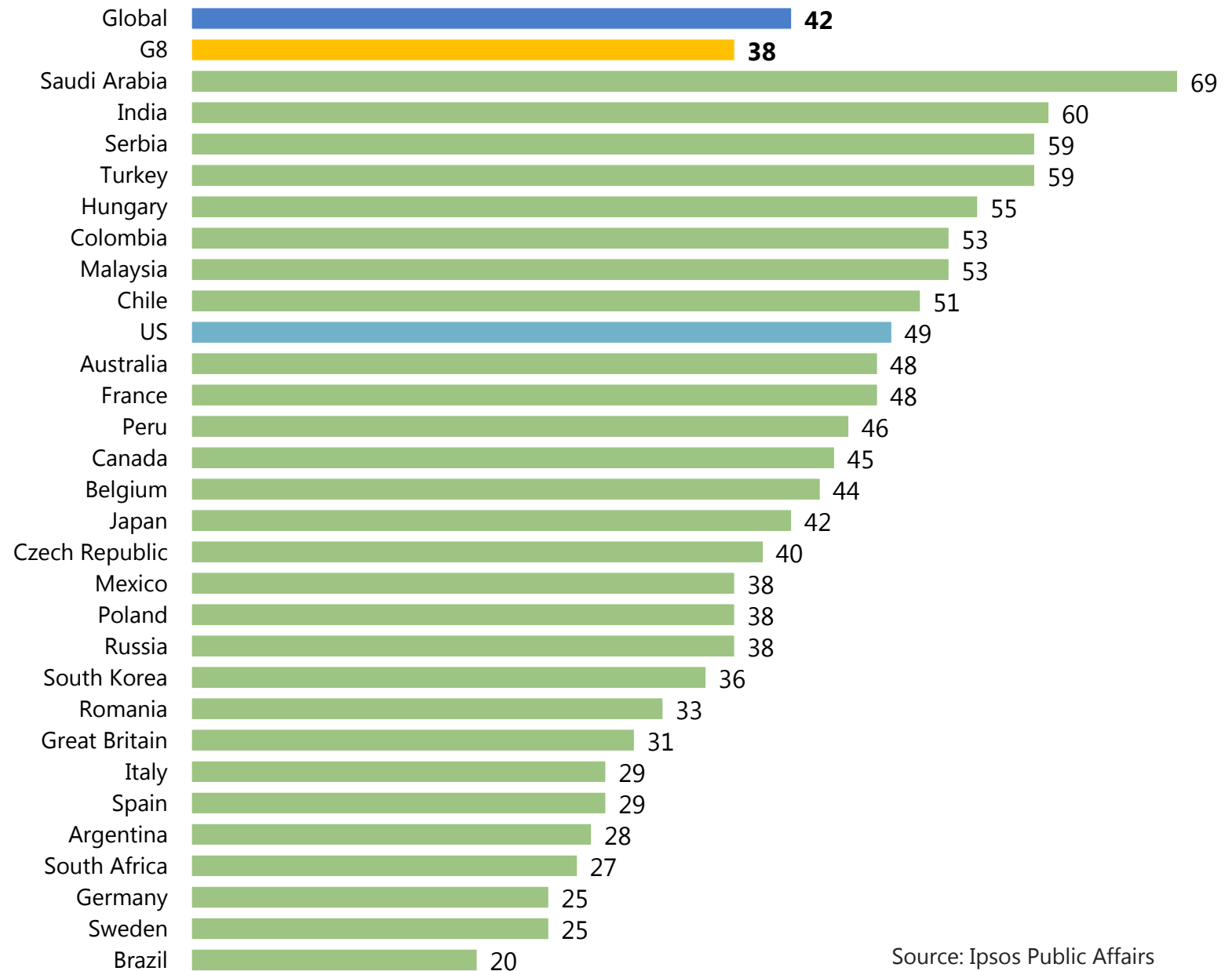
Housing supply

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



Source: Ipsos Public Affairs

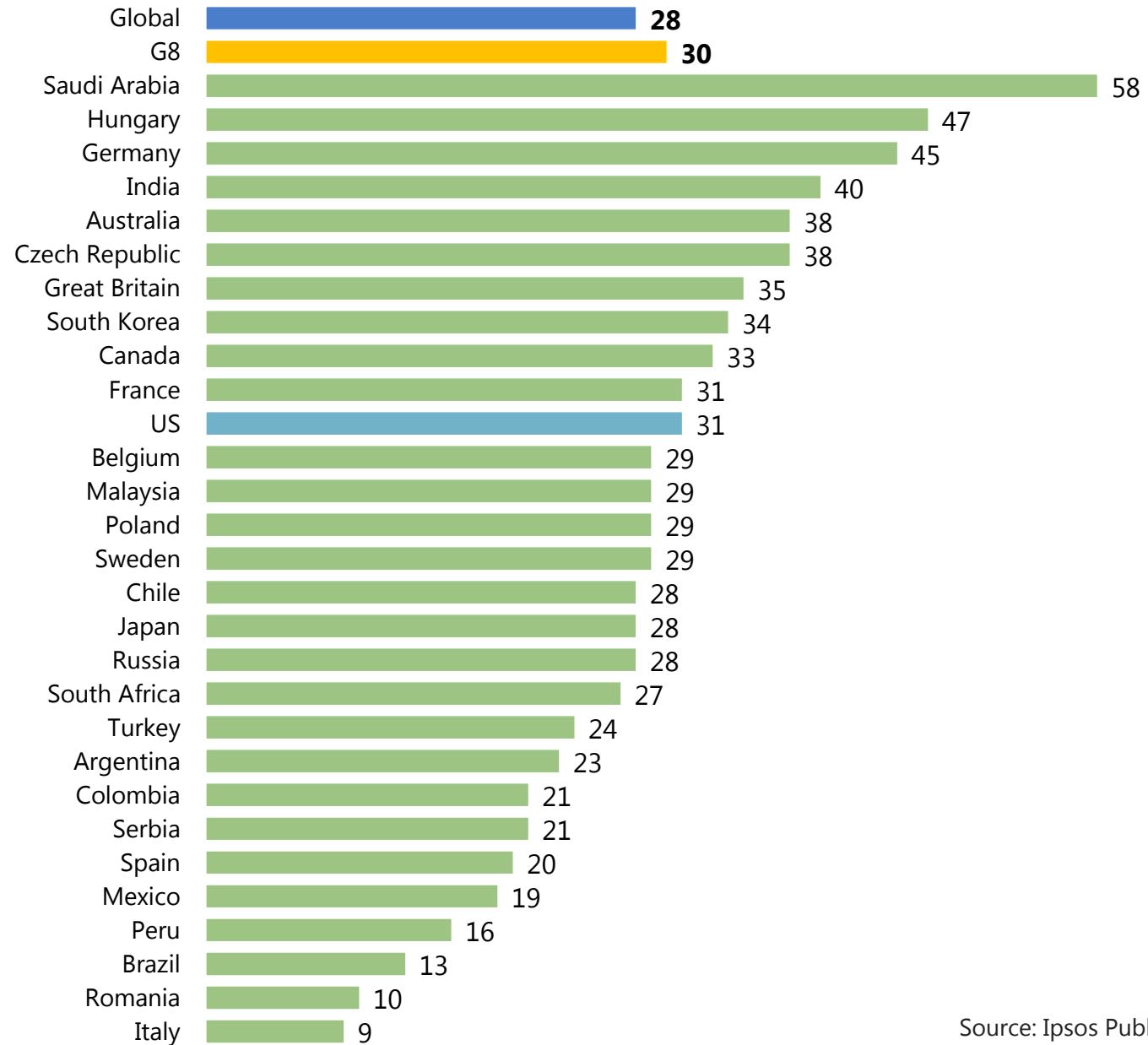
Base: 19,786 adults (online), Aug-Sept 2018

Flood defenses

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 defenses

% very/fairly good



Source: Ipsos Public Affairs

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

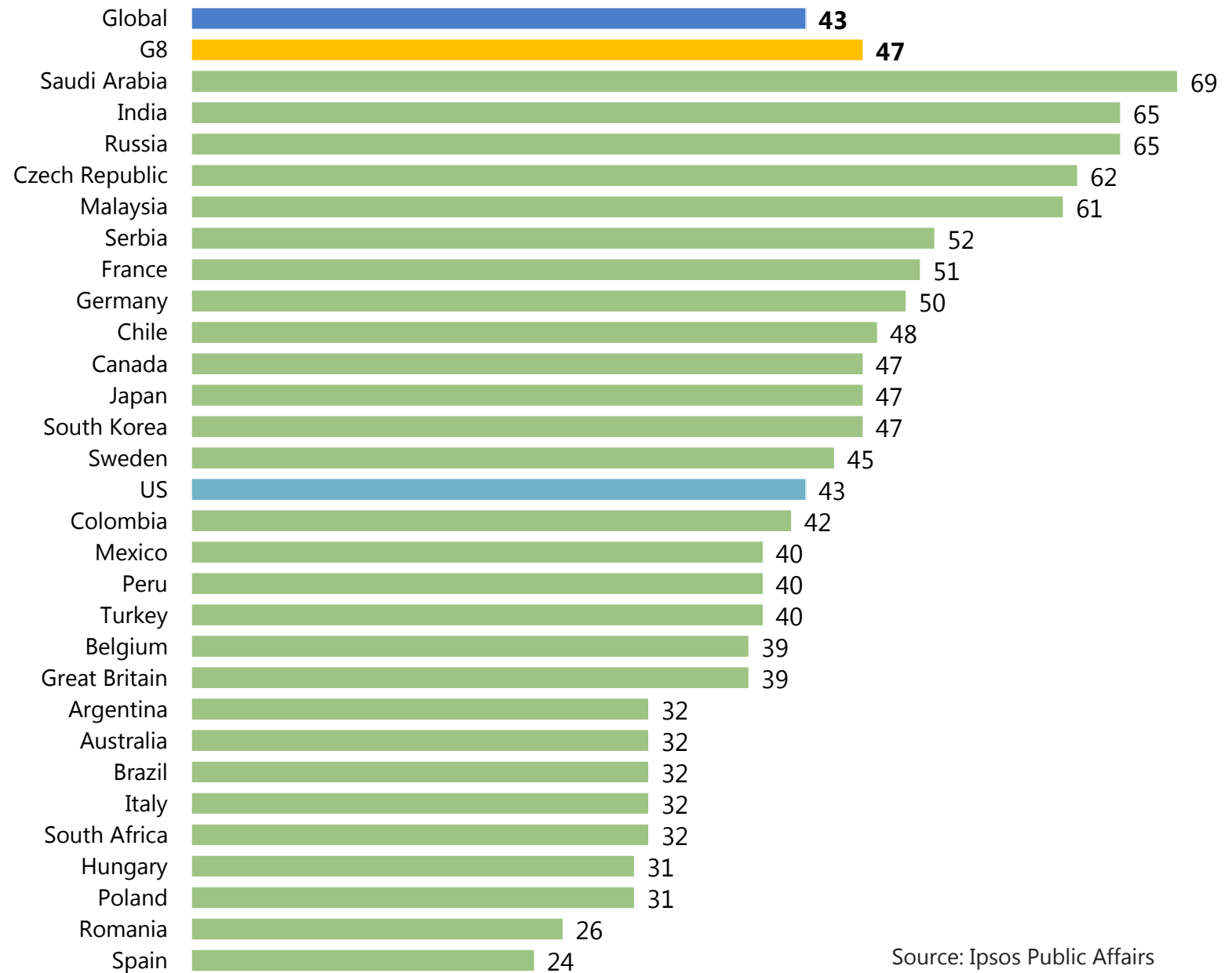
Energy

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



Source: Ipsos Public Affairs

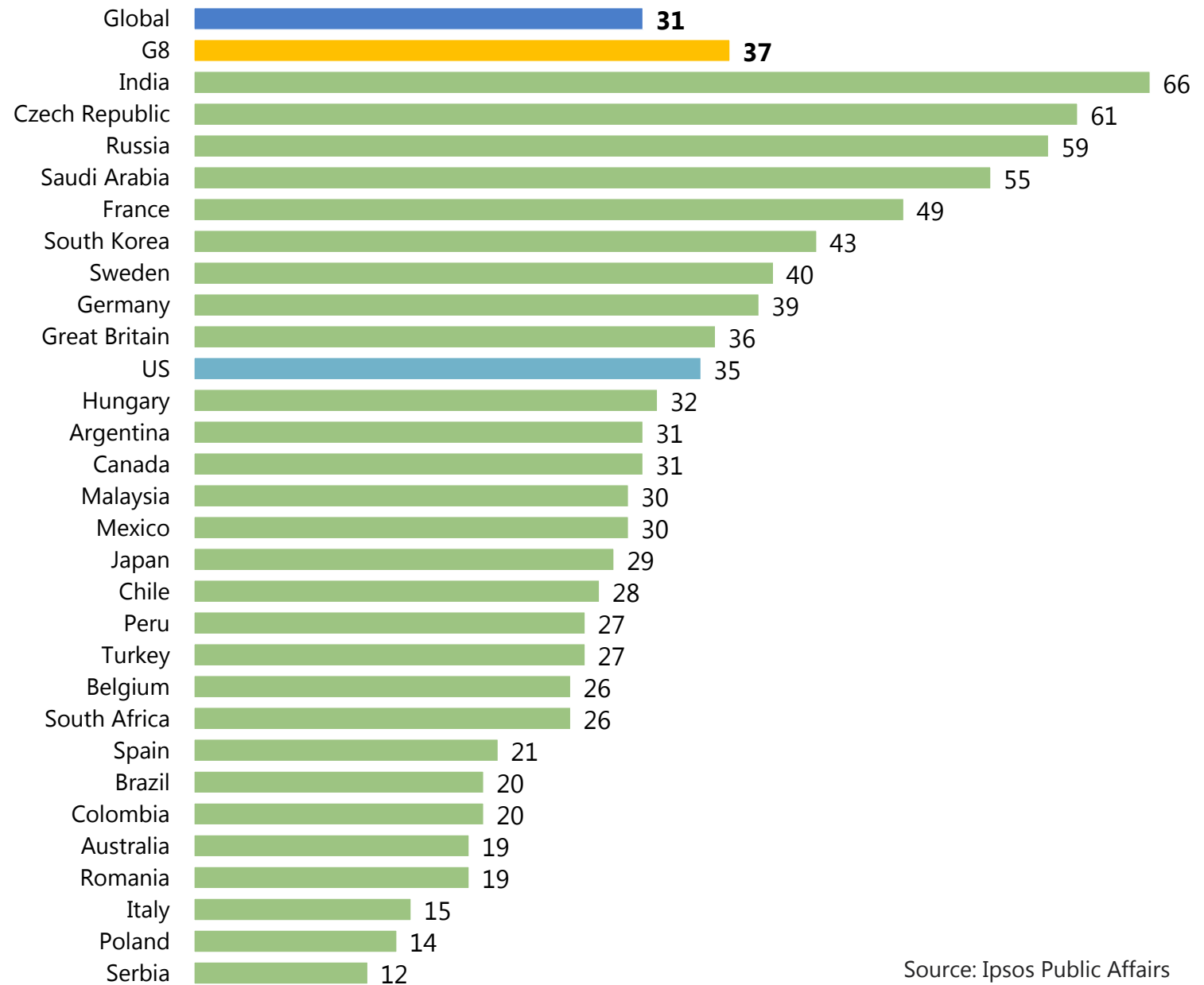
Base: 19,786 adults (online), Aug-Sept 2018

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



Source: Ipsos Public Affairs

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

Digital

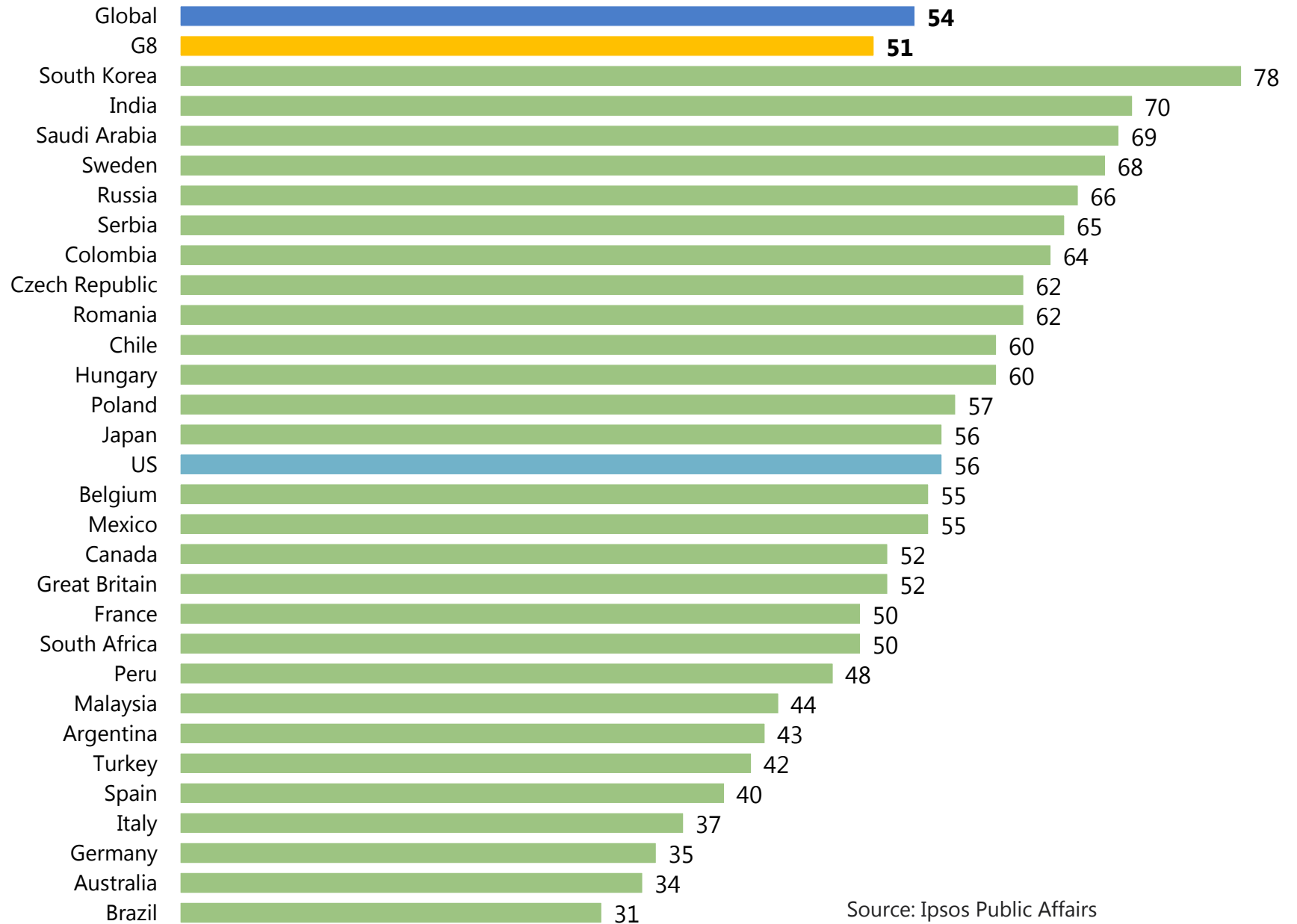
Q. These next questions are about different types of infrastructure.

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



Source: Ipsos Public Affairs

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

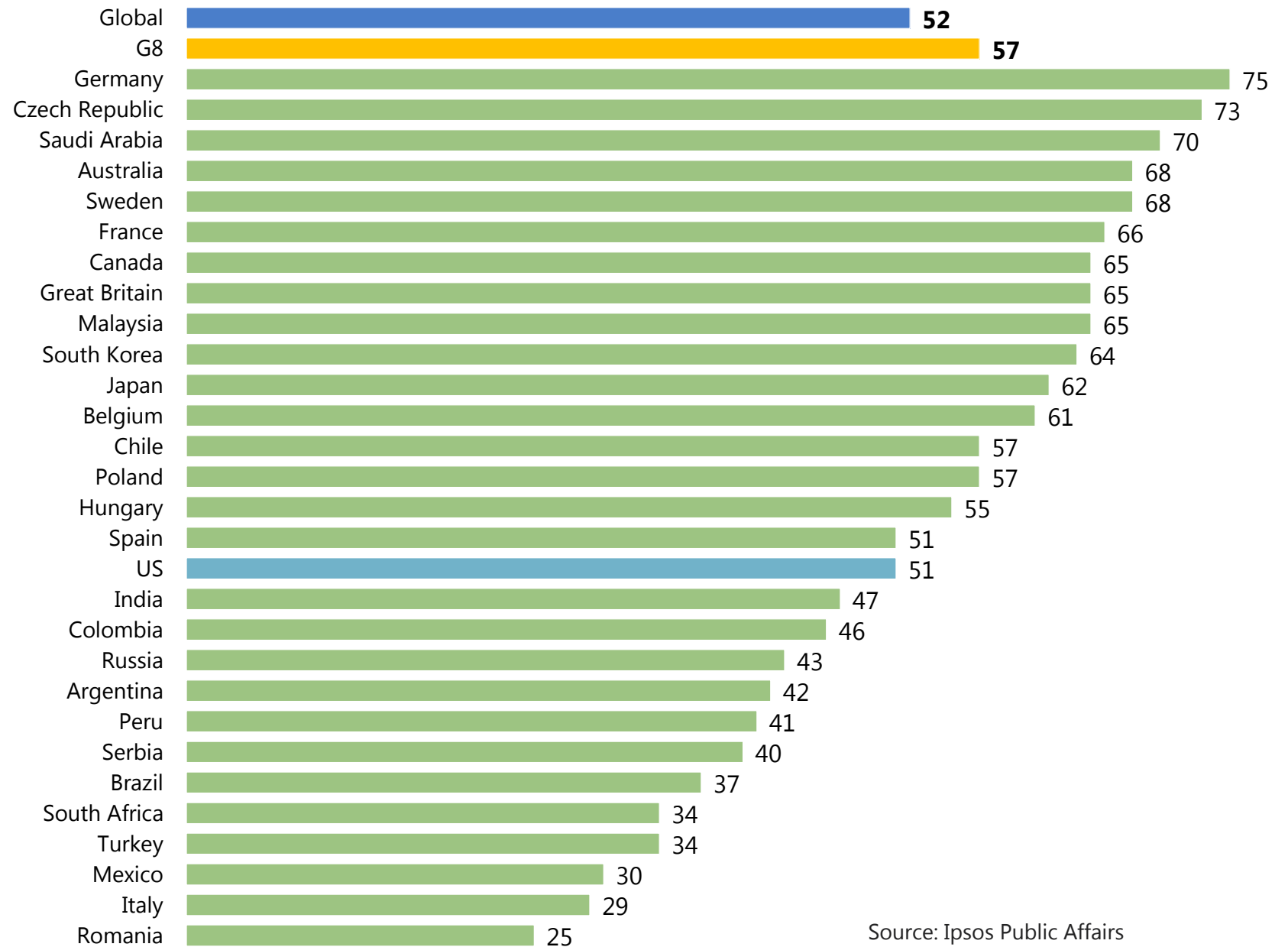
Water supply

& sewage

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]...

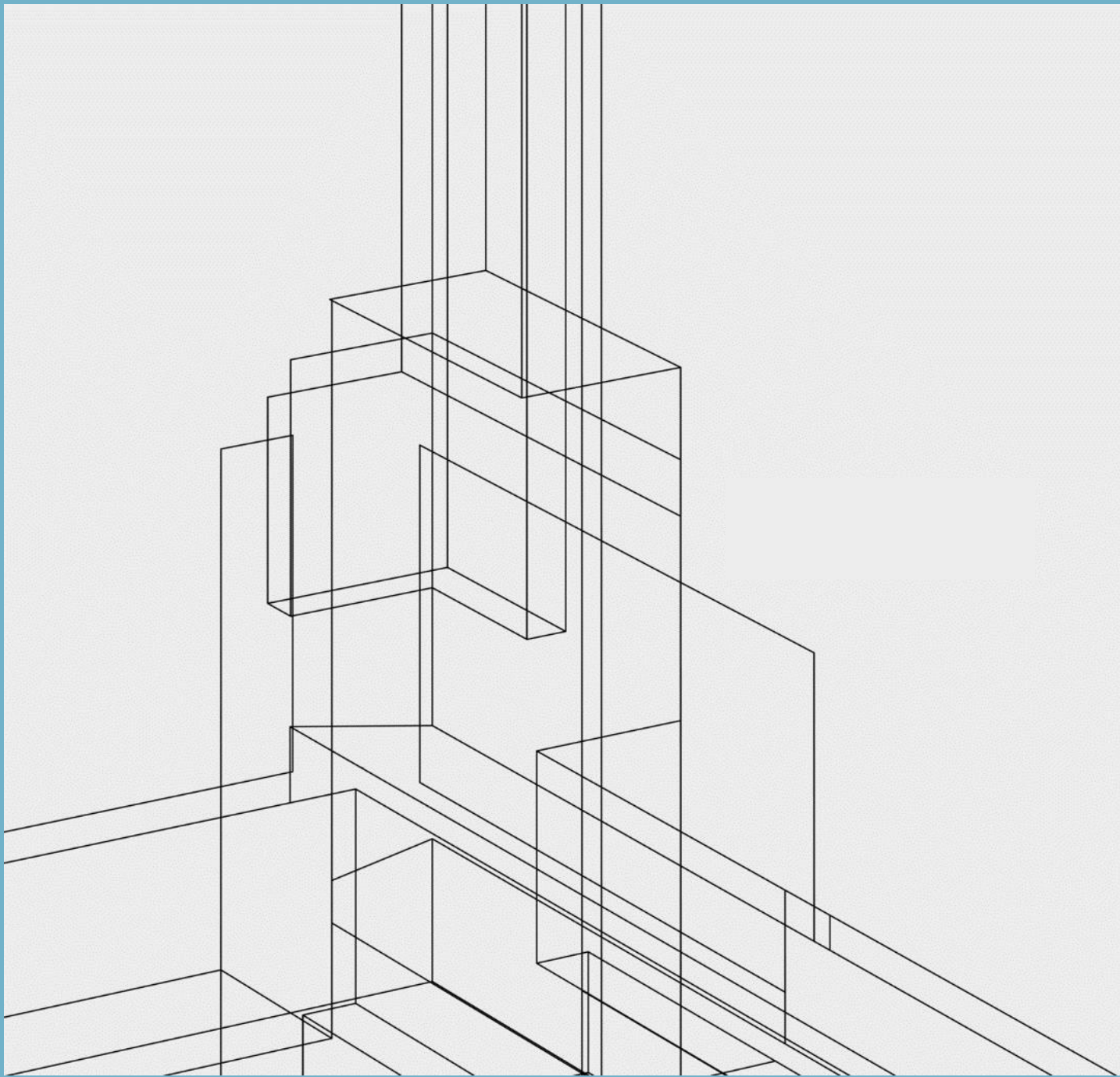
Water supply and sewage

% very/fairly good



Source: Ipsos Public Affairs

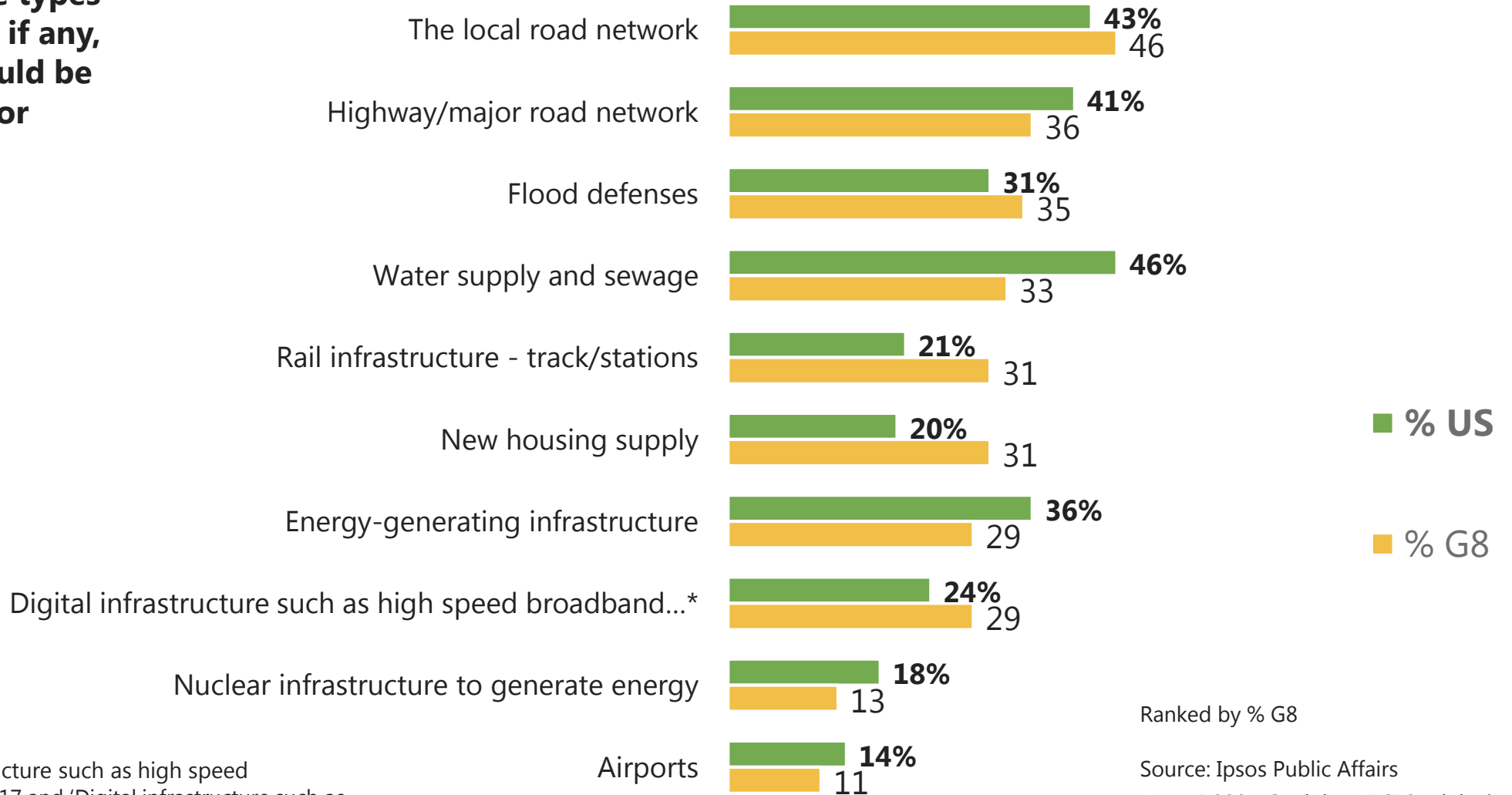
Base: 19,786 adults (online), Aug-Sept 2018



Priorities

US and G8: Priorities

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

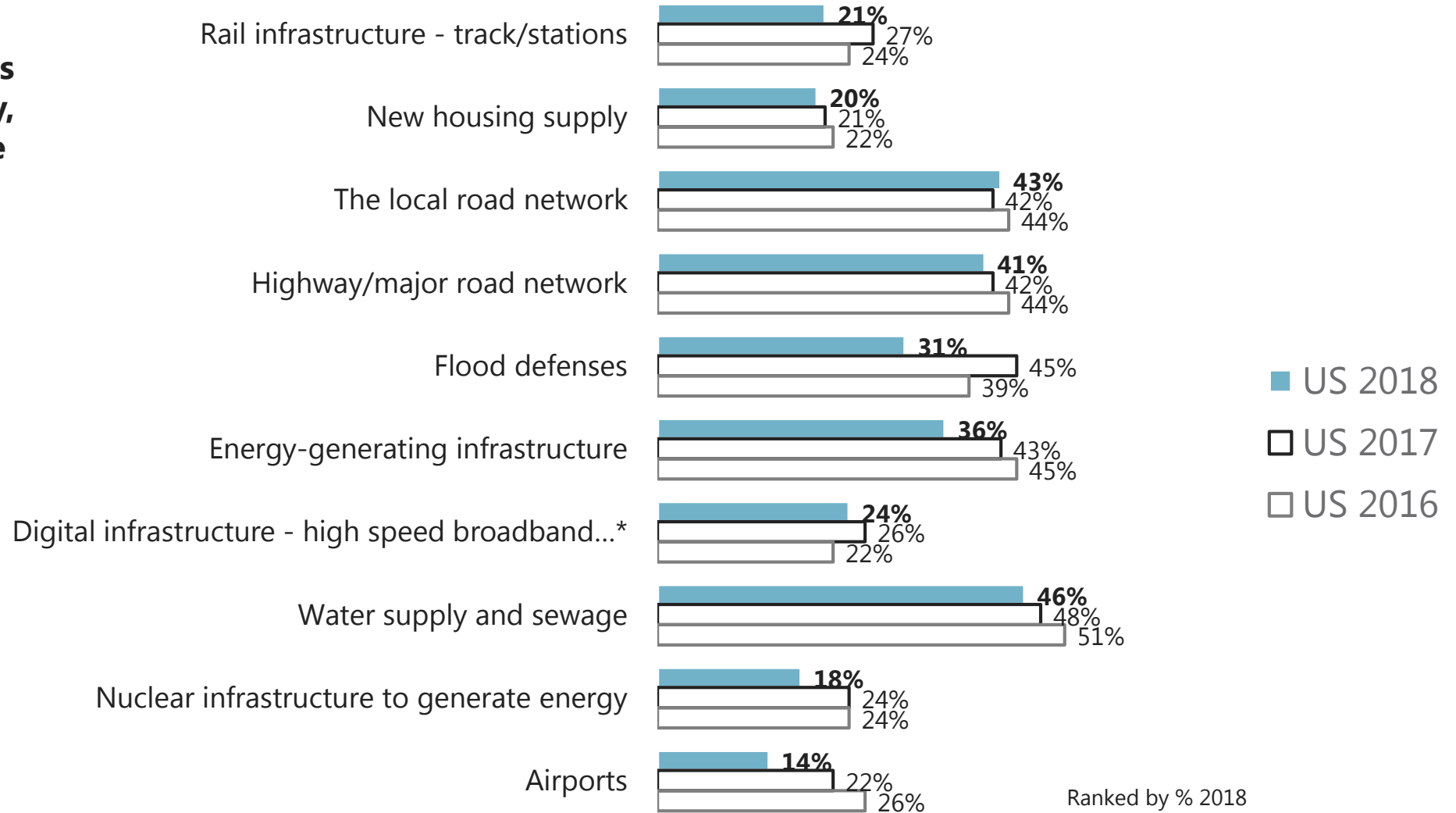


* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018

Source: Ipsos Public Affairs
Base: 1,000 US adults / 7,678 adults in G8 countries (online), Aug-Sept 2018

Trends: Priorities – US

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

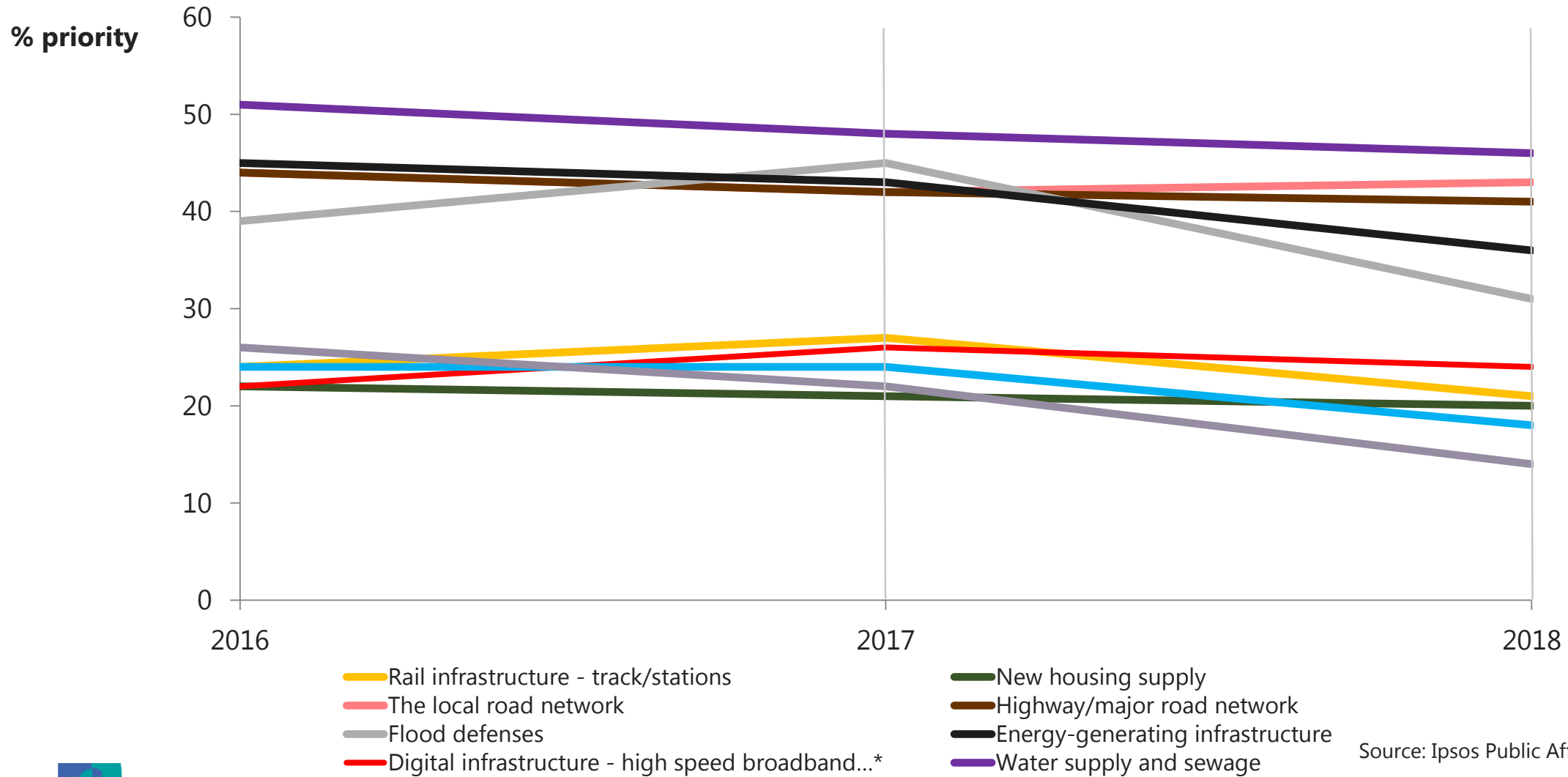


* Asked as 'Digital infrastructure such as high speed broadband' in 2016 and 2017 and 'Digital infrastructure such as high speed broadband, full fibre networks (FTTP), 5G' in 2018

Source: Ipsos Public Affairs

Base: 1,000 US adults (online), Aug-Sept 2018

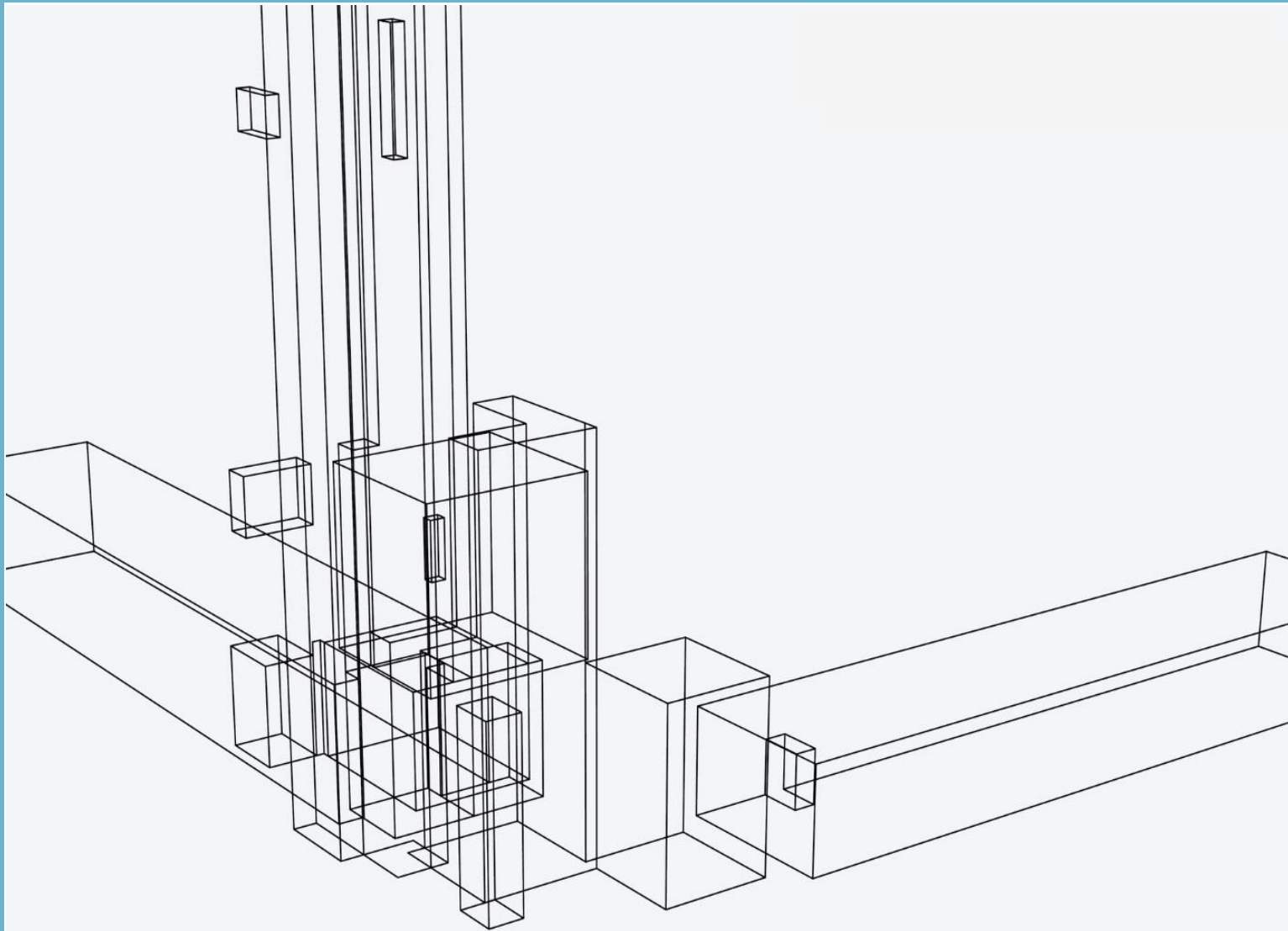
Trends: Priorities – US



Source: Ipsos Public Affairs

Source: Ipsos Public Affairs

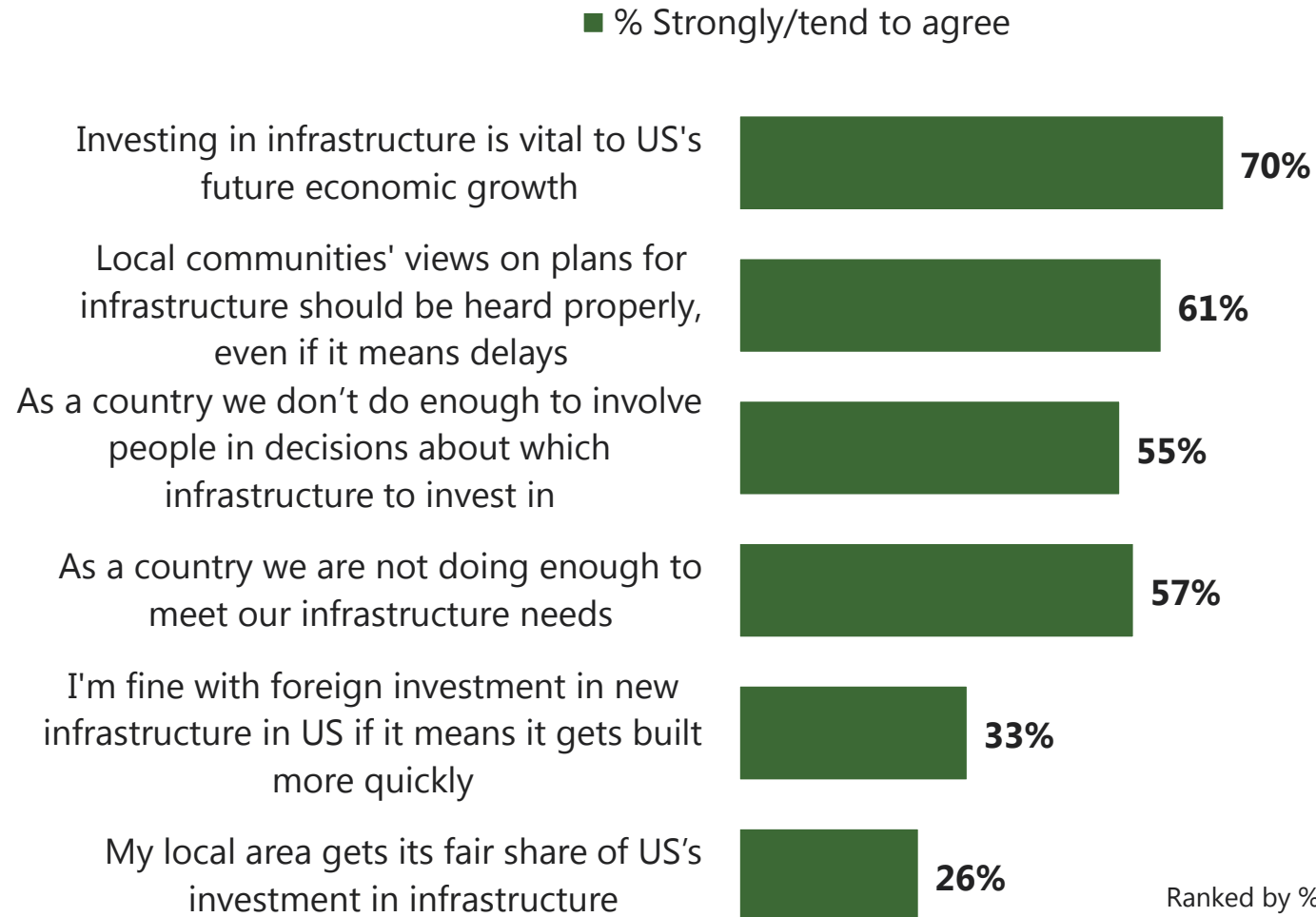
Base: 1,000 US adults (online), Aug-Sept 2018



Attitudes

US: Attitudes

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



Ranked by % strongly/tend to agree (global)

Source: Ipsos Public Affairs

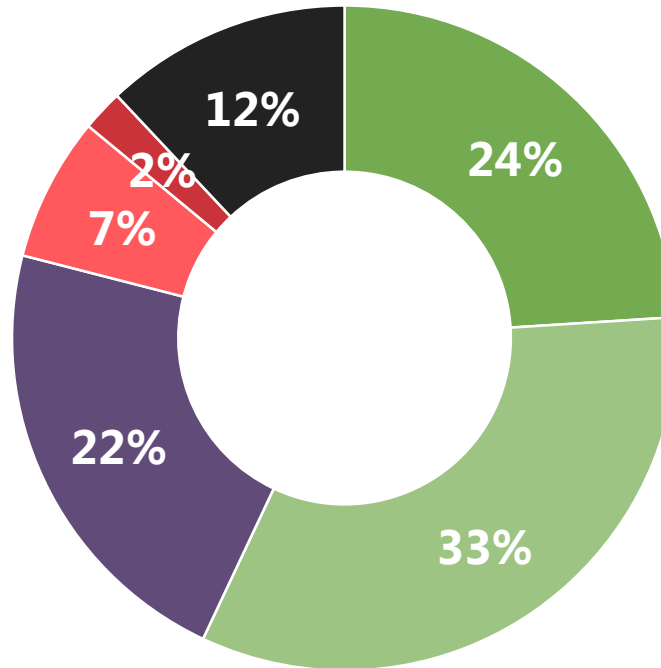
Base: 1,000 US adults (online), Aug-Sept 2018

US: 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 agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



2018:

Agree	Disagree
57%	9%

2017:

Agree	Disagree
62%	8%

2016:

Agree	Disagree
66%	8%

Source: Ipsos Public Affairs

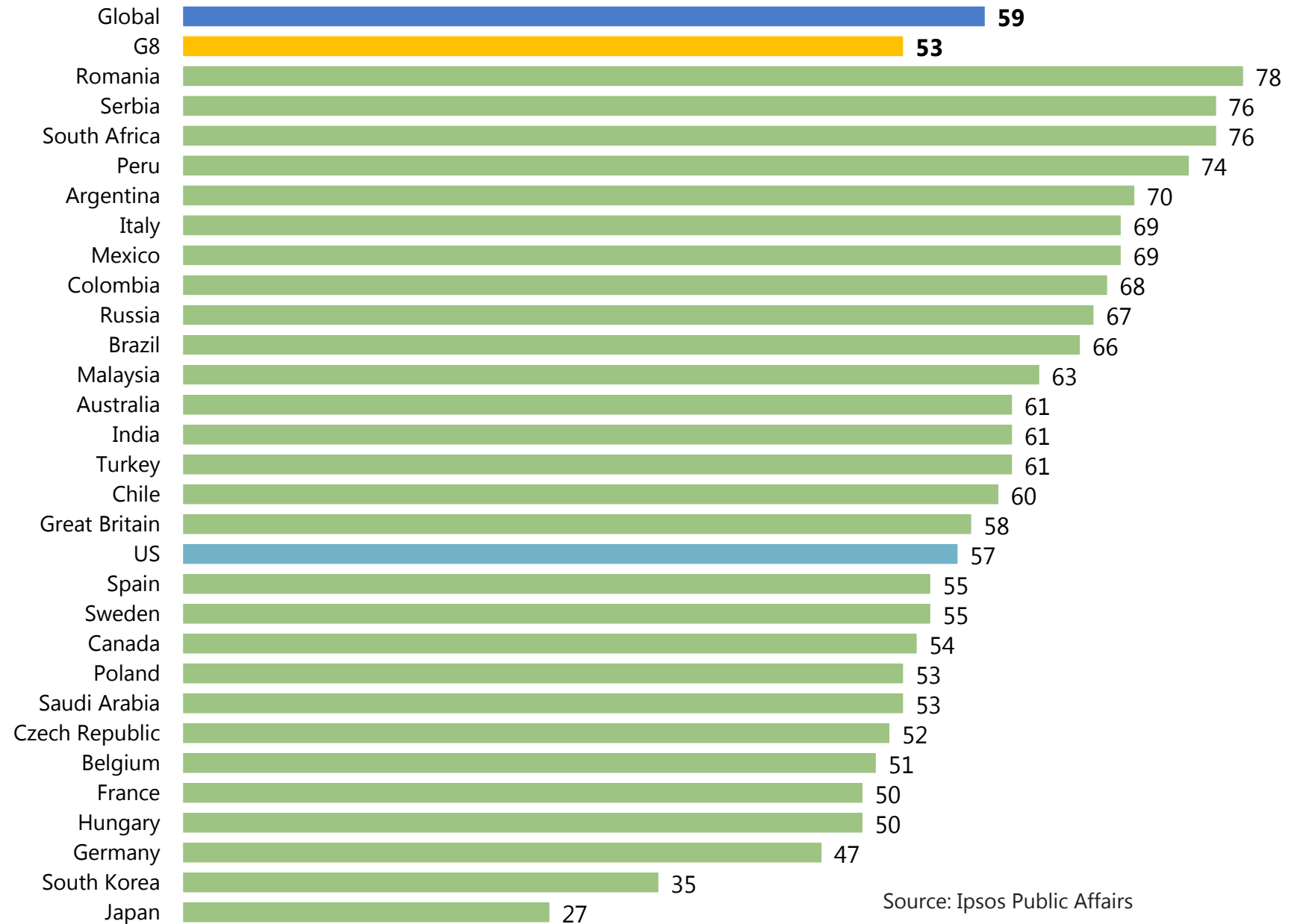
Base: 1,000 US adults (online), Aug-Sept 2018

Doing enough?

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% strongly/tend to agree



Source: Ipsos Public Affairs

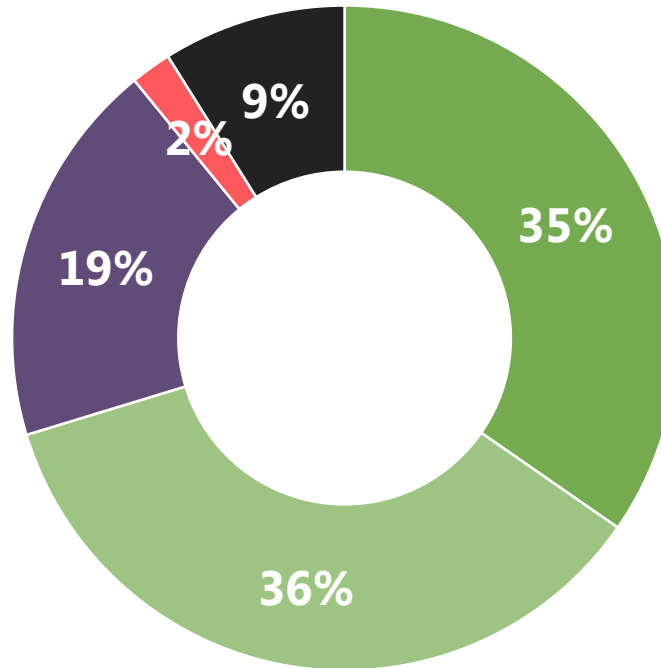
Base: 19,786 adults (online), Aug-Sept 2018

US: Investment vital

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

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

- % Strongly agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



2018:

Agree	Disagree
70%	2%

2017:

Agree	Disagree
73%	3%

2016:

Agree	Disagree
76%	3%

Source: Ipsos Public Affairs

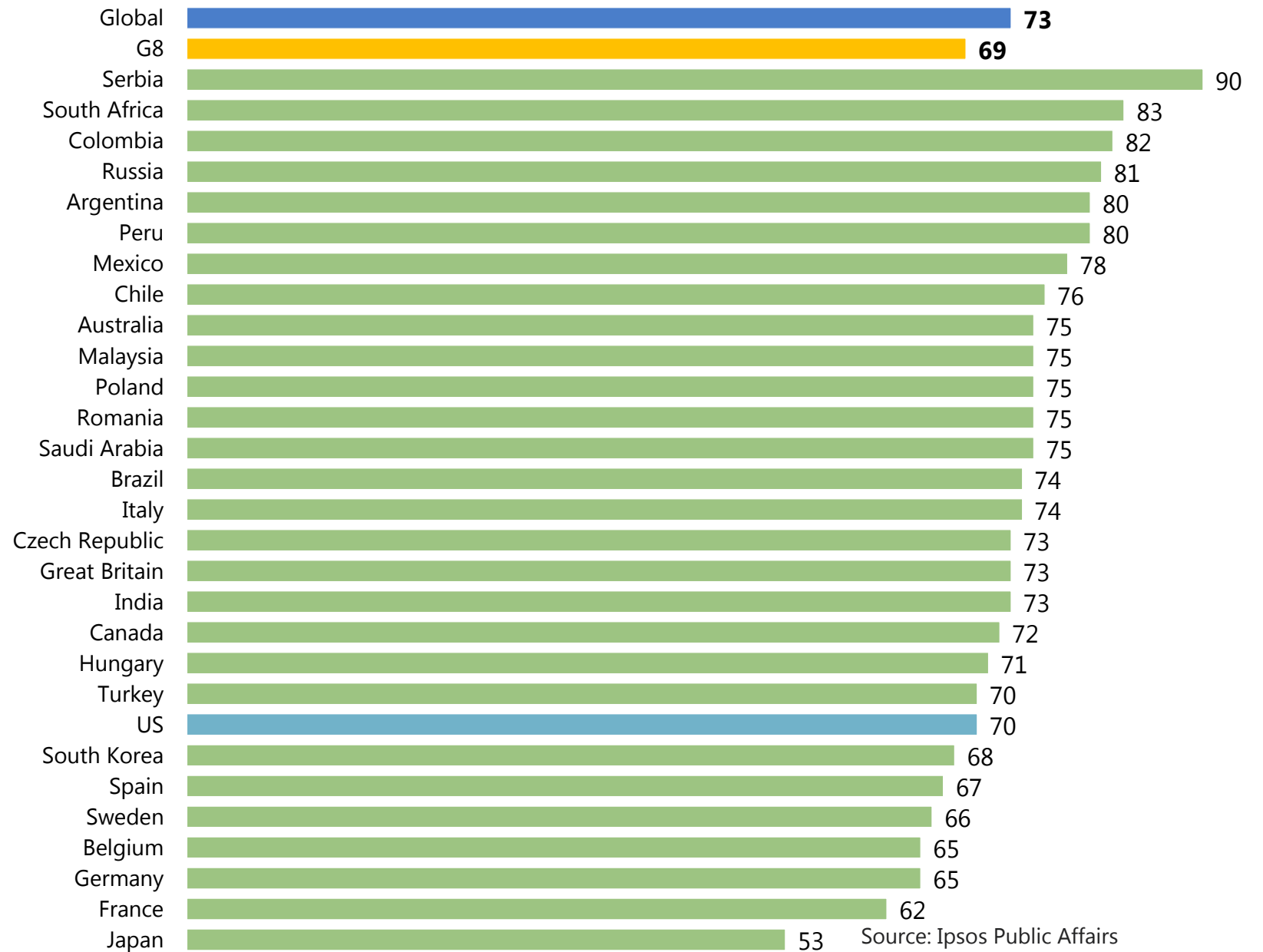
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Investment vital

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

% strongly/tend to agree



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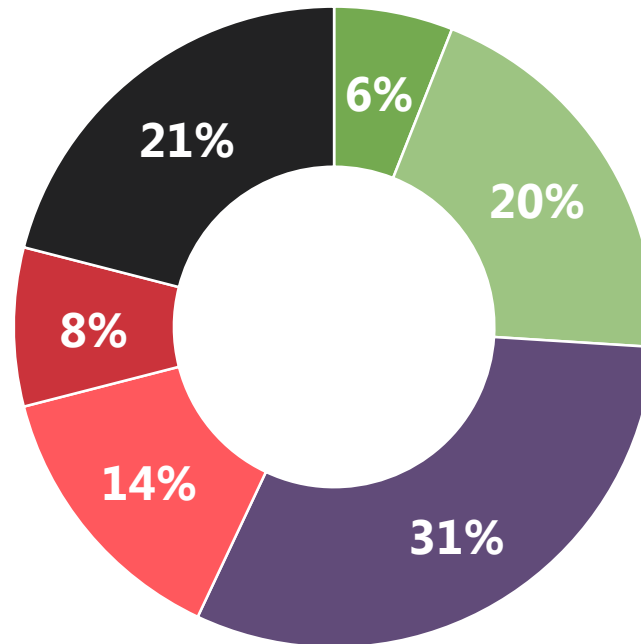
Base: 19,786 adults (online), Aug-Sept 2018

US: 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 agree ■ % Tend to agree ■ % Neither/nor
■ % Tend to disagree ■ % Strongly disagree ■ % Don't know



2018:

Agree	Disagree
26%	22%

2017:

Agree	Disagree
36%	20%

Source: Ipsos Public Affairs

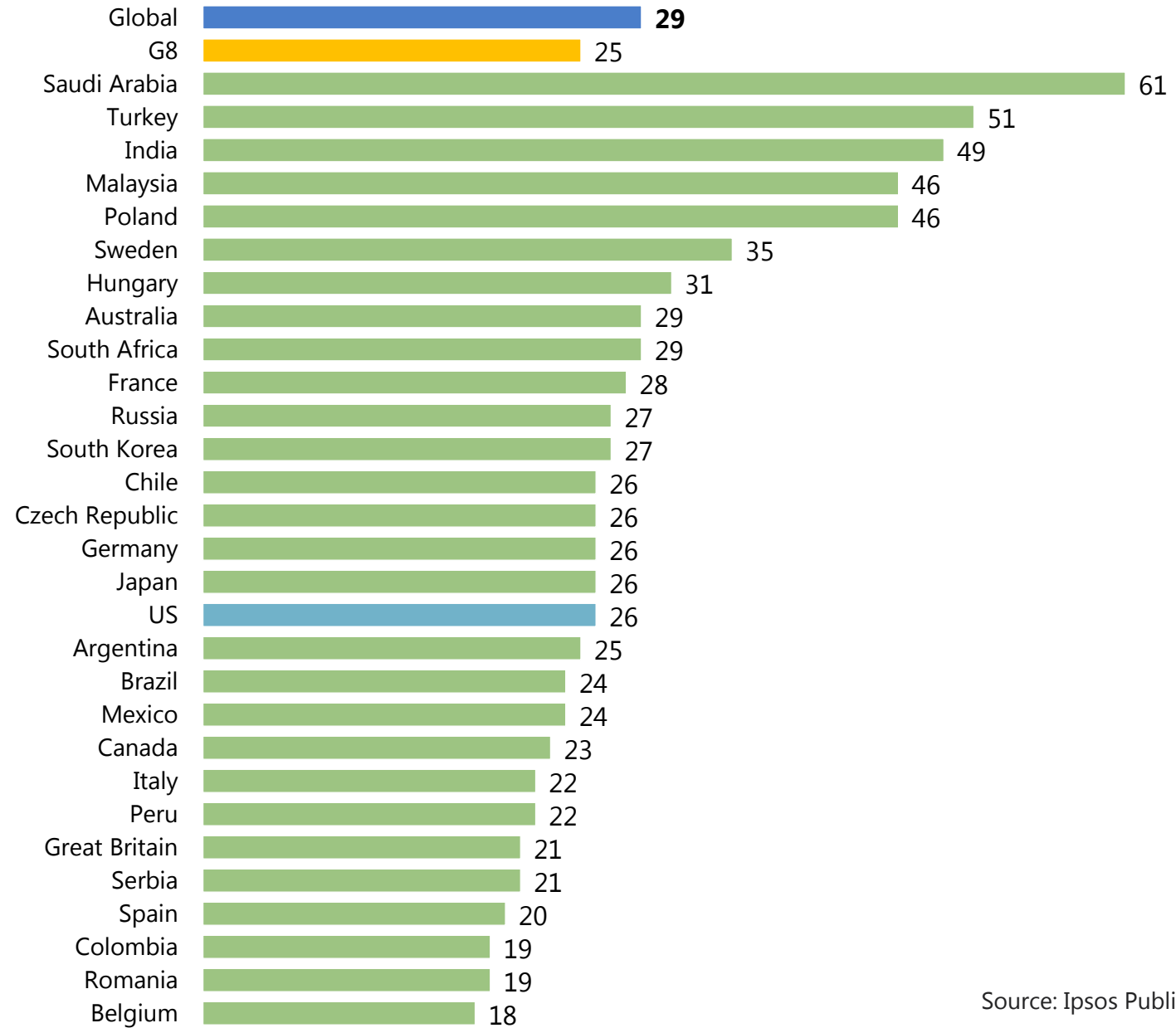
Base: 1,000 US adults (online), Aug-Sept 2018

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



Source: Ipsos Public Affairs

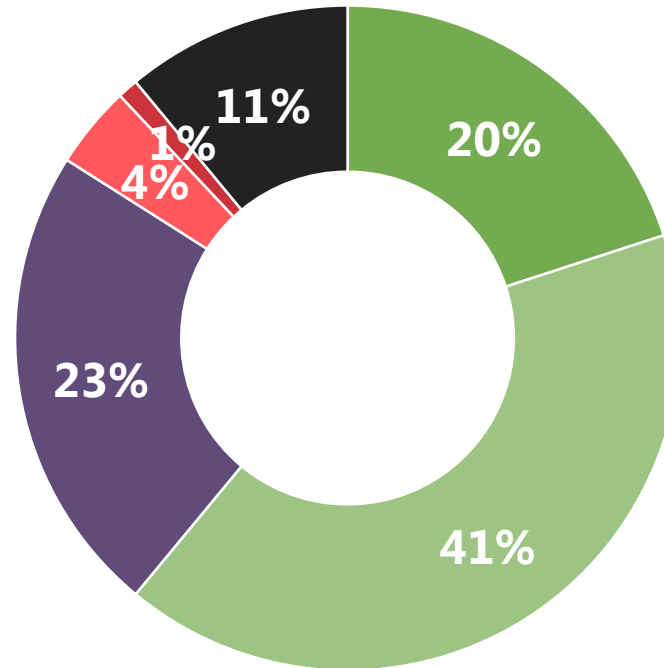
Base: 19,786 adults (online), Aug-Sept 2018

US: 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 agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



2018:

Agree	Disagree
61%	5%

2016:

Agree	Disagree
68%	6%

Source: Ipsos Public Affairs

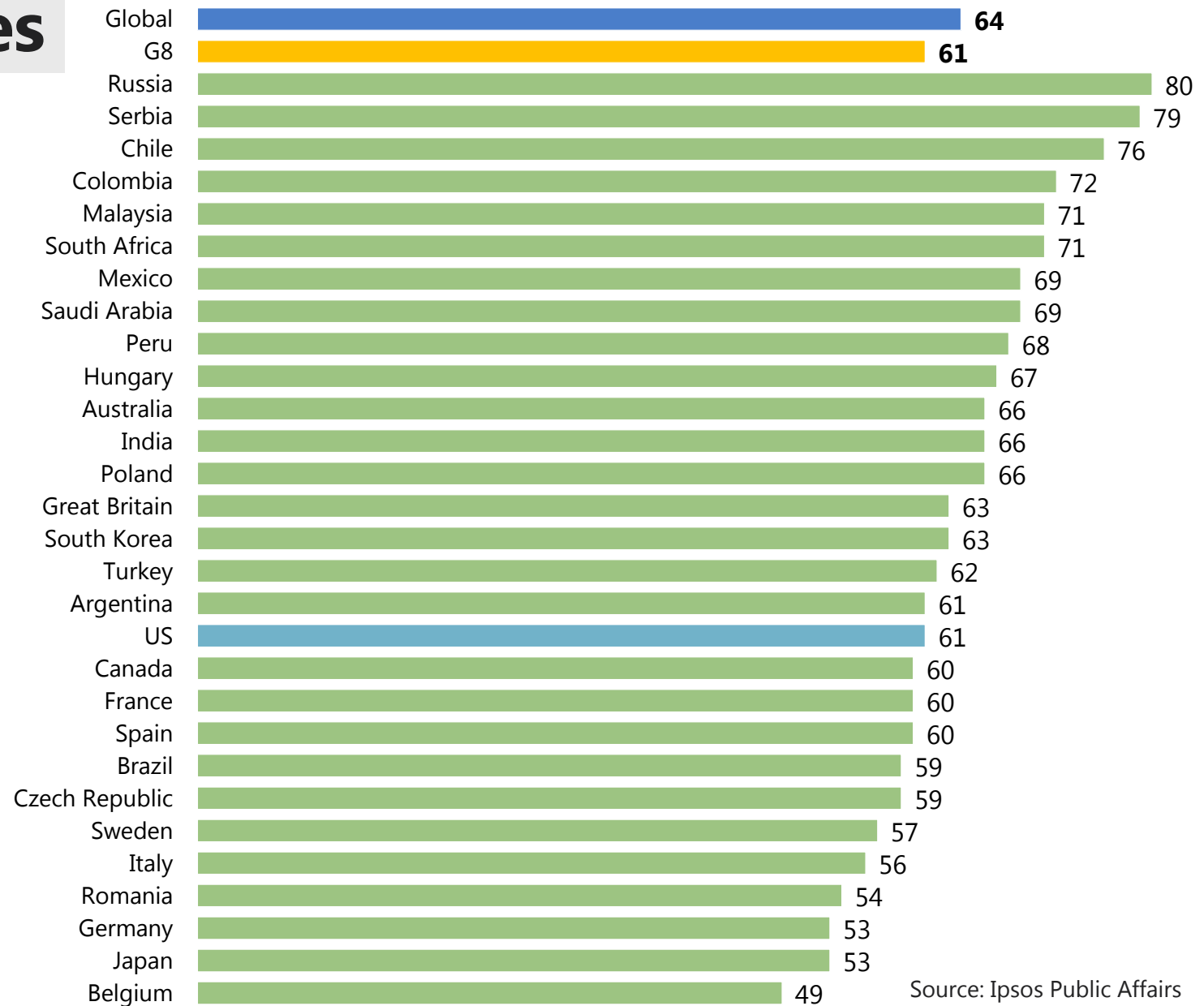
Base: 1,000 US adults (online), Aug-Sept 2018

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



Source: Ipsos Public Affairs

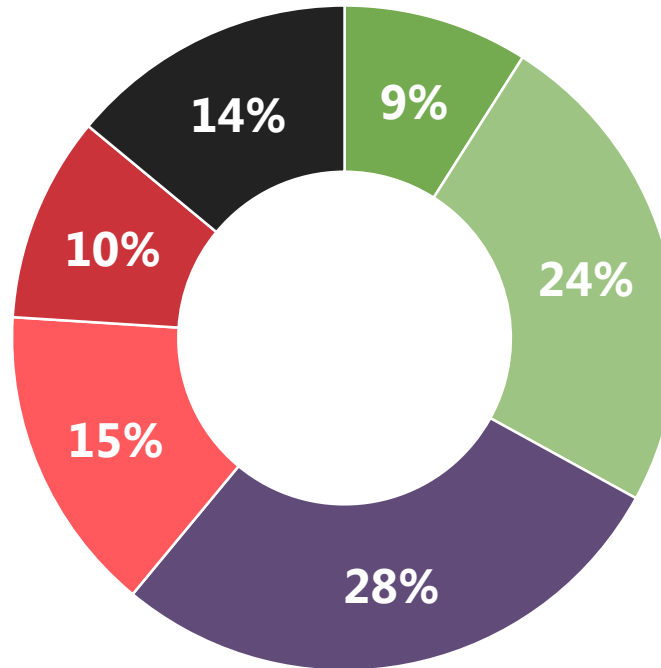
Base: 19,786 adults (online), Aug-Sept 2018

US: 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 agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



2018:

Agree	Disagree
33%	24%

2016:

Agree	Disagree
33%	23%

Source: Ipsos Public Affairs

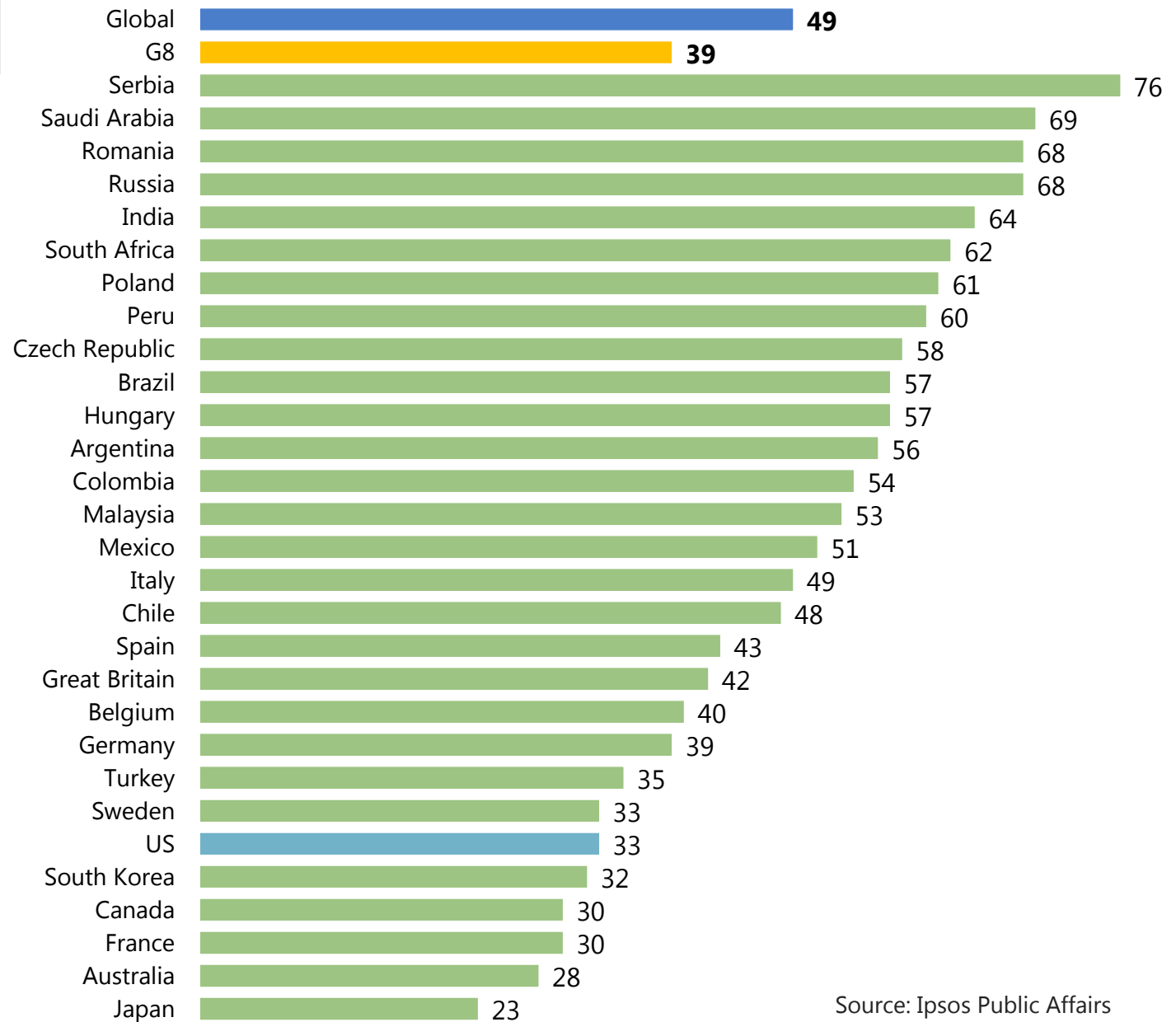
Base: 1,000 US adults (online), Aug-Sept 2018

Foreign investment

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% strongly/tend to agree



Source: Ipsos Public Affairs

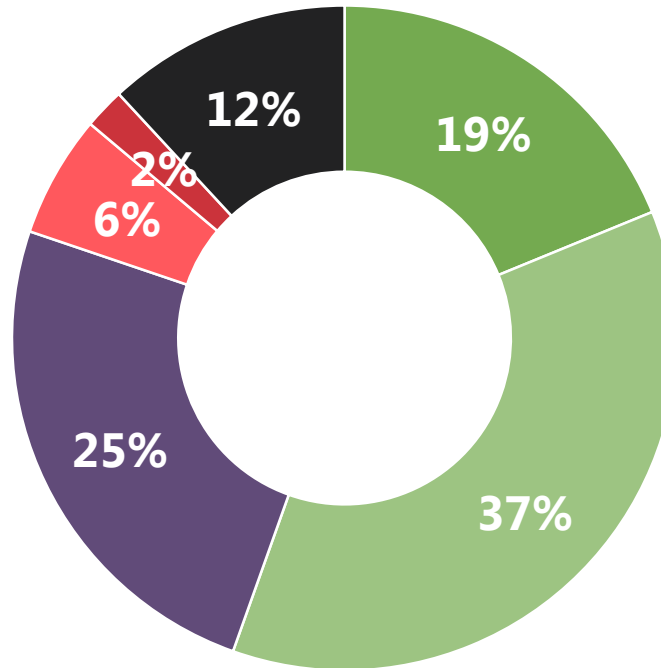
Base: 19,786 adults (online), Aug-Sept 2018

US: 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 agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



2018:

Agree	Disagree
55%	8%

Source: Ipsos Public Affairs

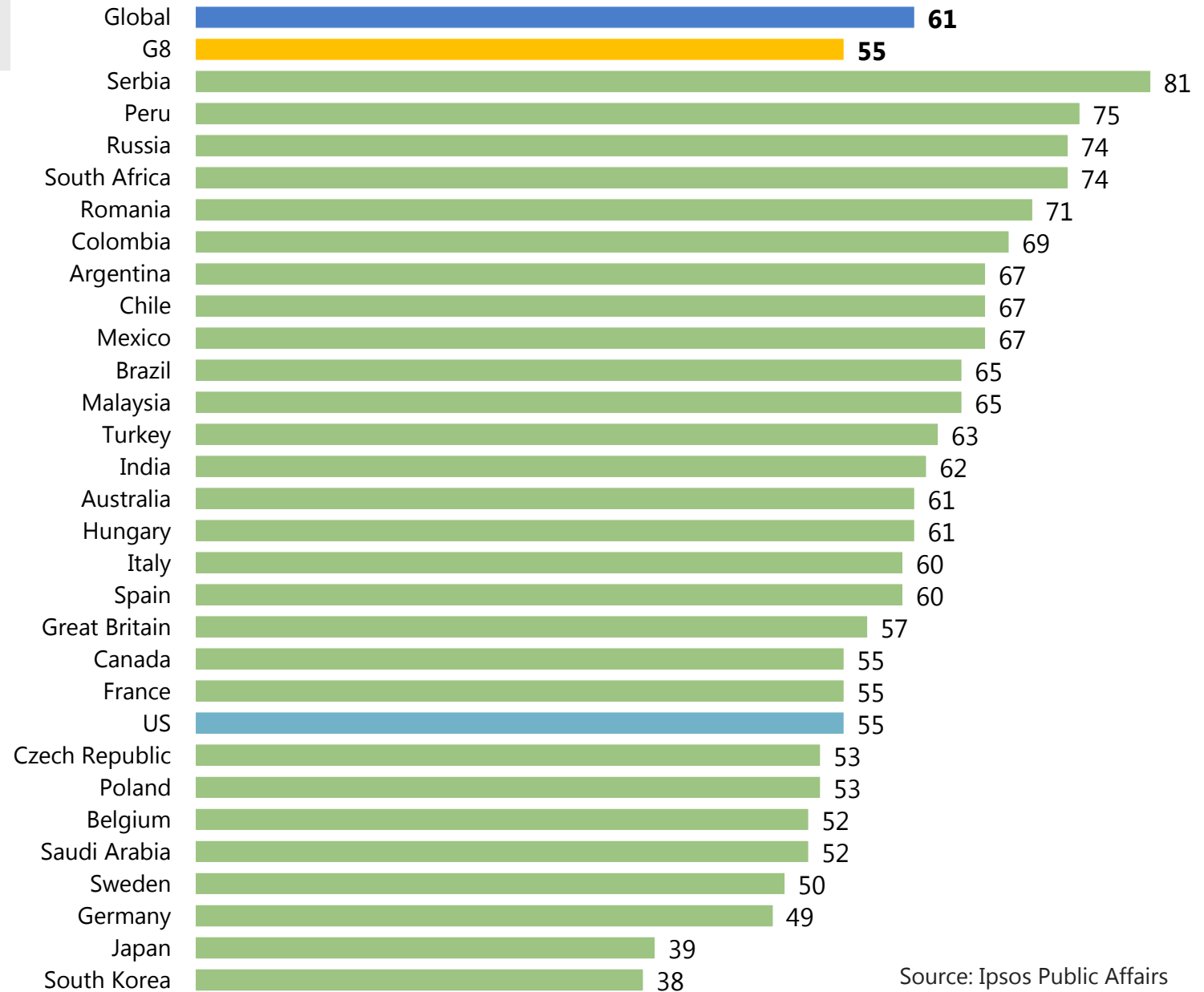
Base: 1,000 US adults (online), Aug-Sept 2018

Involving people

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

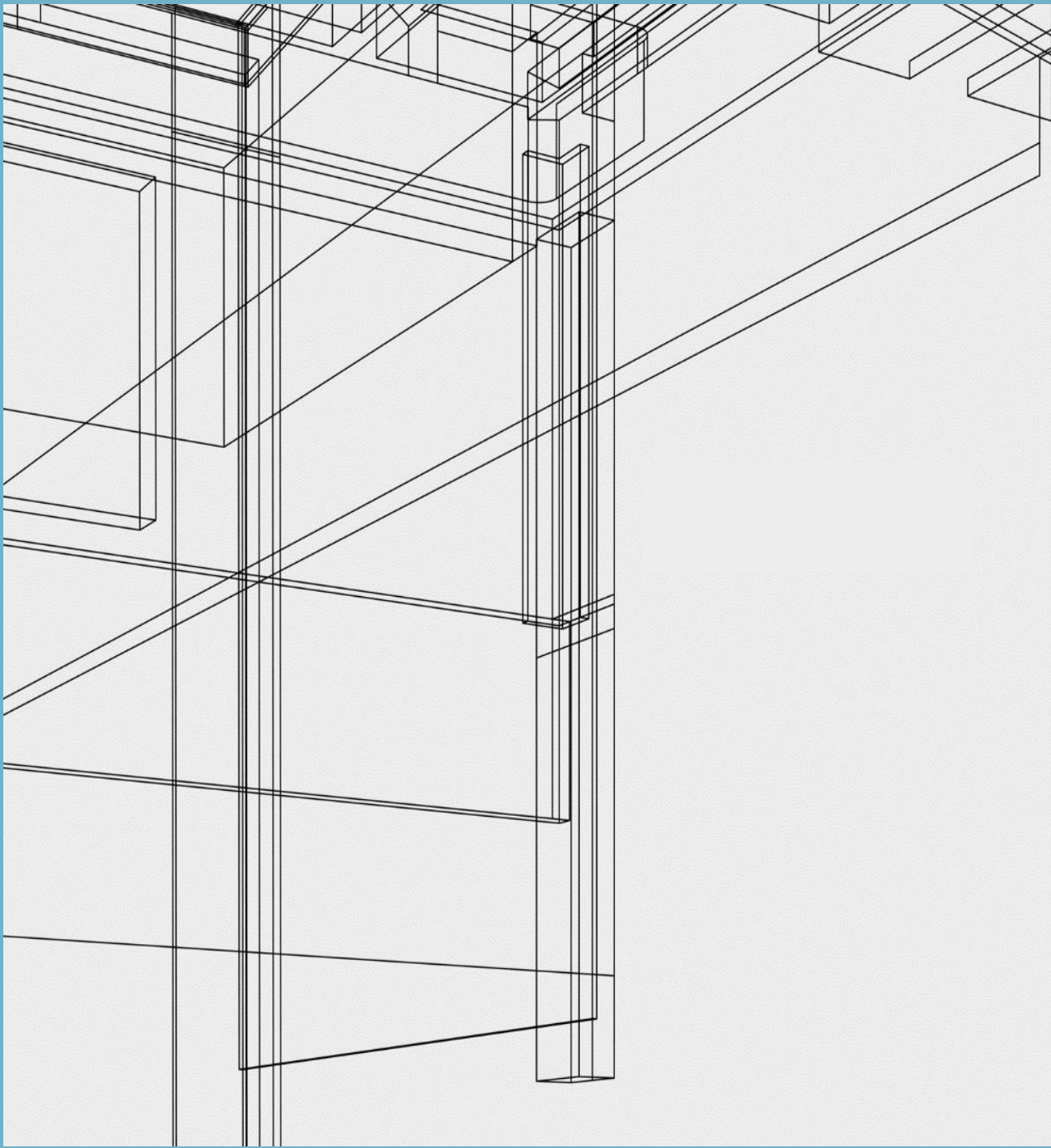
As a country we don't do enough to involve people in decisions about which infrastructure to invest in

% strongly/tend to agree



Source: Ipsos Public Affairs

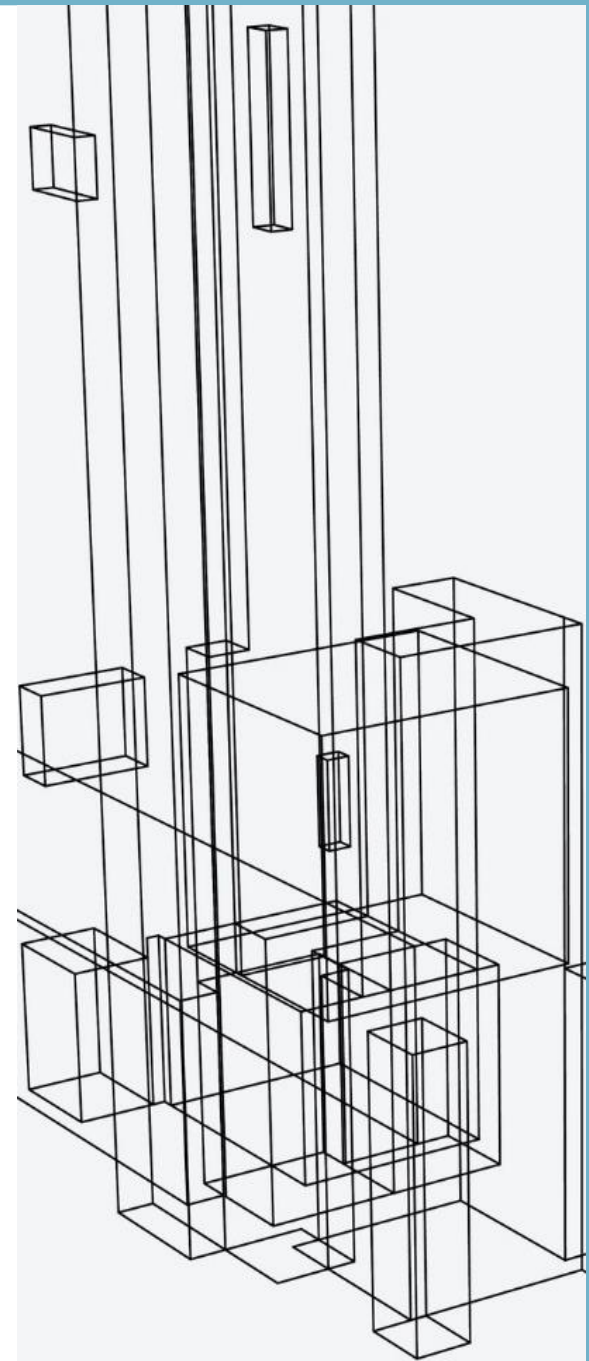
Base: 19,786 adults (online), Aug-Sept 2018



Key findings

Key findings

- Overall satisfaction with infrastructure has **fallen eleven points** in the United States since 2017, more than shifts in sentiment globally (down five points) and within G8 nations (down four points).
- Americans are least satisfied with **the local road network** and **flood defenses**, but most satisfied with **airports** and **the digital infrastructure such as broadband**.
- Ratings of **rail** infrastructure and **new housing supply** compare least favorably internationally, while **water supply and sewage** compares best.
- Water supply and sewage is the number one **infrastructure priority** for Americans. The local road network and highways come in at second and third place respectively.
- The majority of Americans agree that investing in infrastructure is vital to the country's future economy. However, most believe that the United States is not doing enough to meet infrastructure needs.





Further

information

GAME CHANGERS



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