Ipsos MORI

America's infrastructure

Public satisfaction and priorities

October 2016

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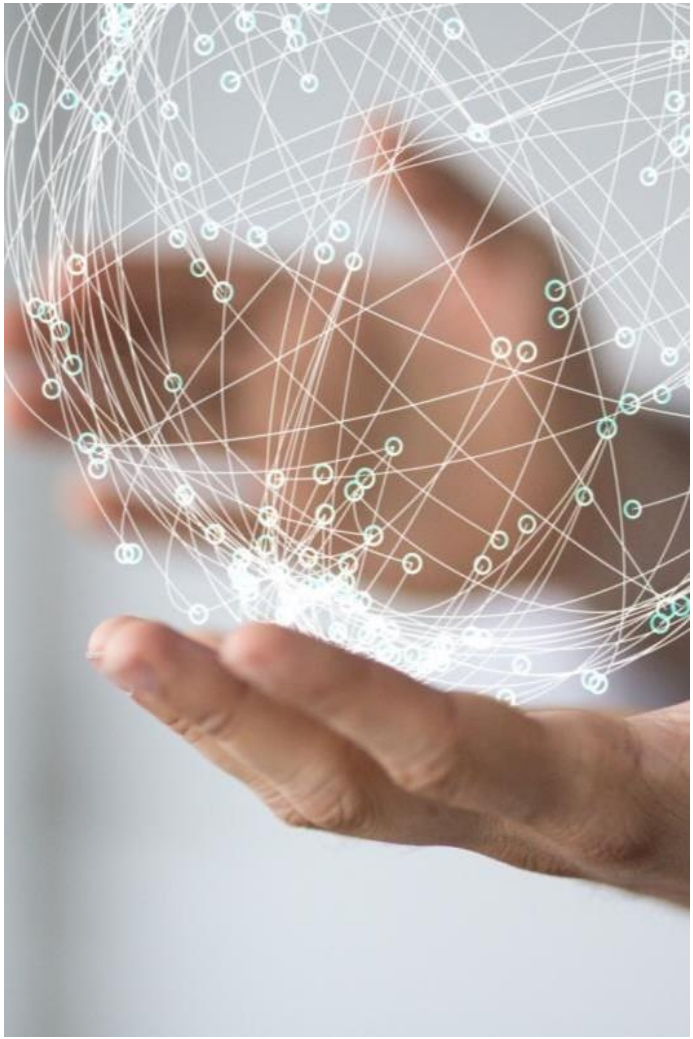
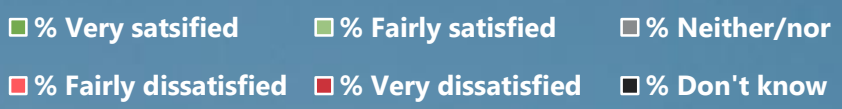
Methodology

- These are the findings of the Global @dvisor Infrastructure Index 2016. In total 18,517 interviews were conducted between 26 August and 9 September 2016 in 26 countries around the world via the Ipsos Online Panel system.
- In Britain, the sample was 1,001 adults aged 16-64. Data are weighted to match the profile of the population.
- Where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of don't knows or not stated responses. Rounding may also be the reason why combinations e.g. % good differ from the sum of % very good + % fairly good.
- Full details are available at www.ipsos-mori.com



Public lukewarm on America's infrastructure

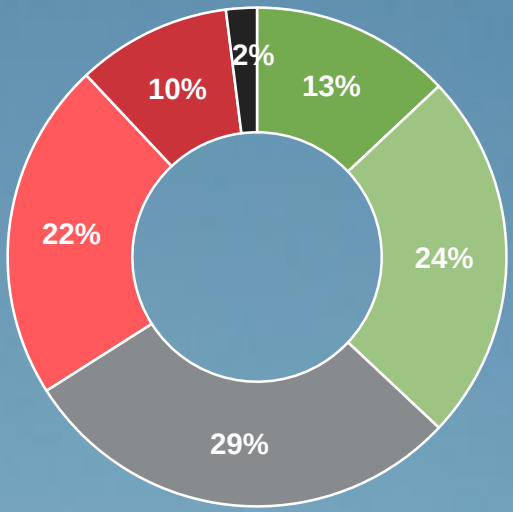


Q

I now want you to think about America'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 America's national infrastructure?



Satisfied	Dissatisfied
36%	32%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Just above global average

Q

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

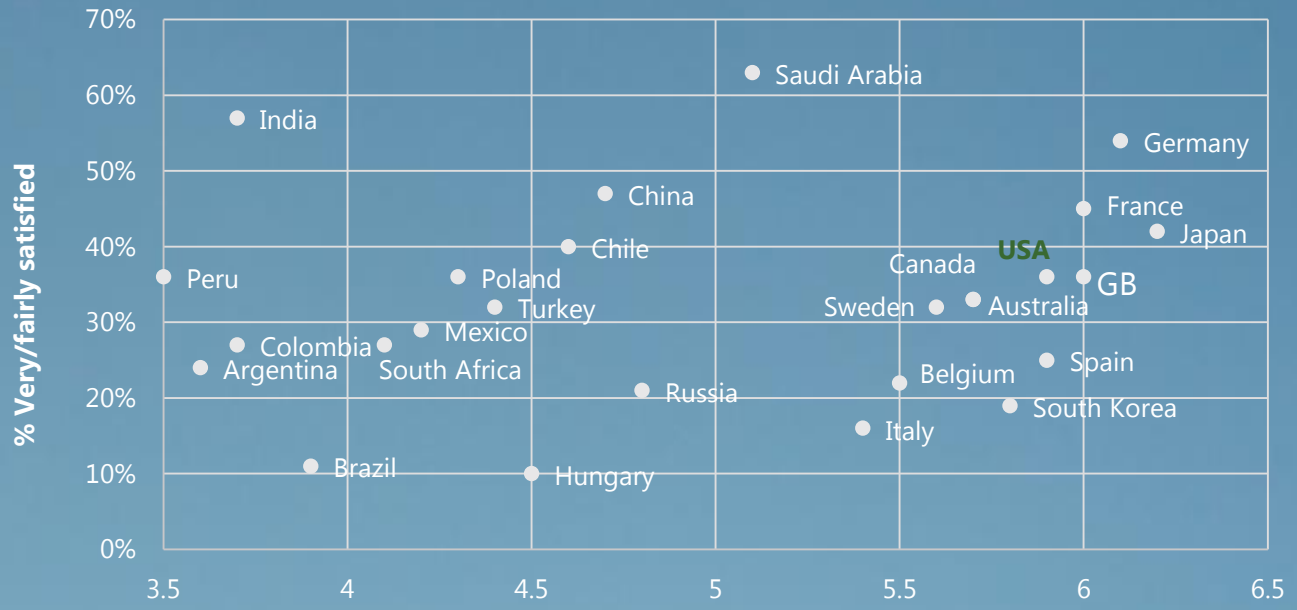
By infrastructure I mean things we rely on like road, rail and air networks, utilities such as energy and water, and broadband and other communications.

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

Base: 18,517 adults (online), 26 Aug-9 Sept

Comparison vs GCI

The World Economic Forum's Global Competitiveness Report 2015-2016 "assesses the competitiveness landscape of 140 economies, providing insight into the drivers of their productivity and prosperity." The chart below shows the GCI rating for infrastructure (1-7 where 7=best) plotted against the % very/fairly satisfied with national infrastructure from our survey.



Base: 18,517 adults (online), 26 Aug-9 Sept

Global Competitiveness Index – Infrastructure

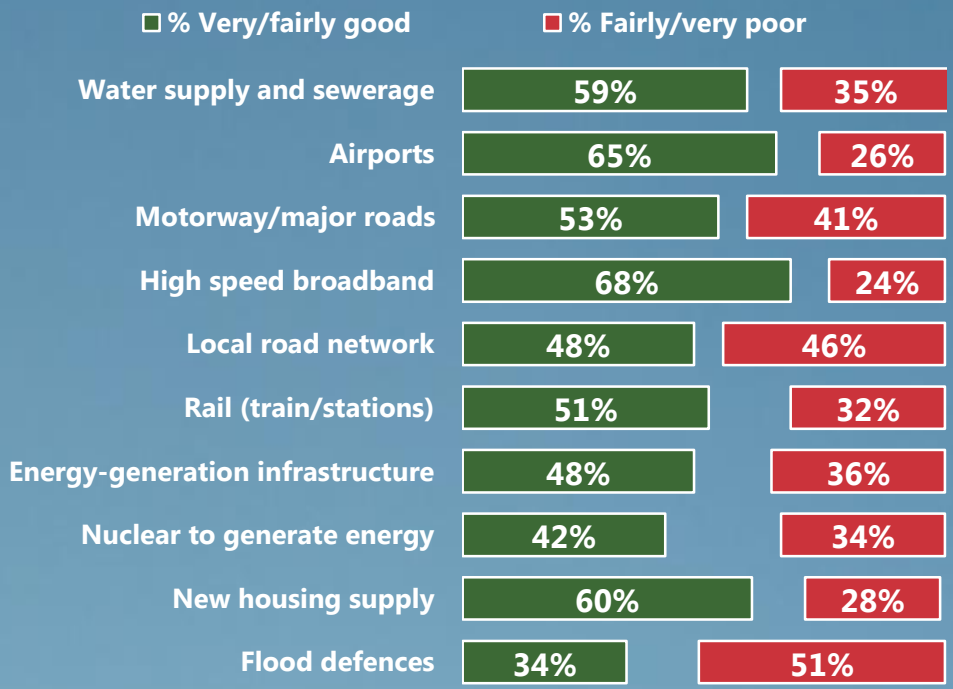
http://reports.weforum.org/global-competitiveness-report-2015-2016/competitiveness-rankings

Variation in ratings of different types

Q

These next questions are about different types of infrastructure in the US.

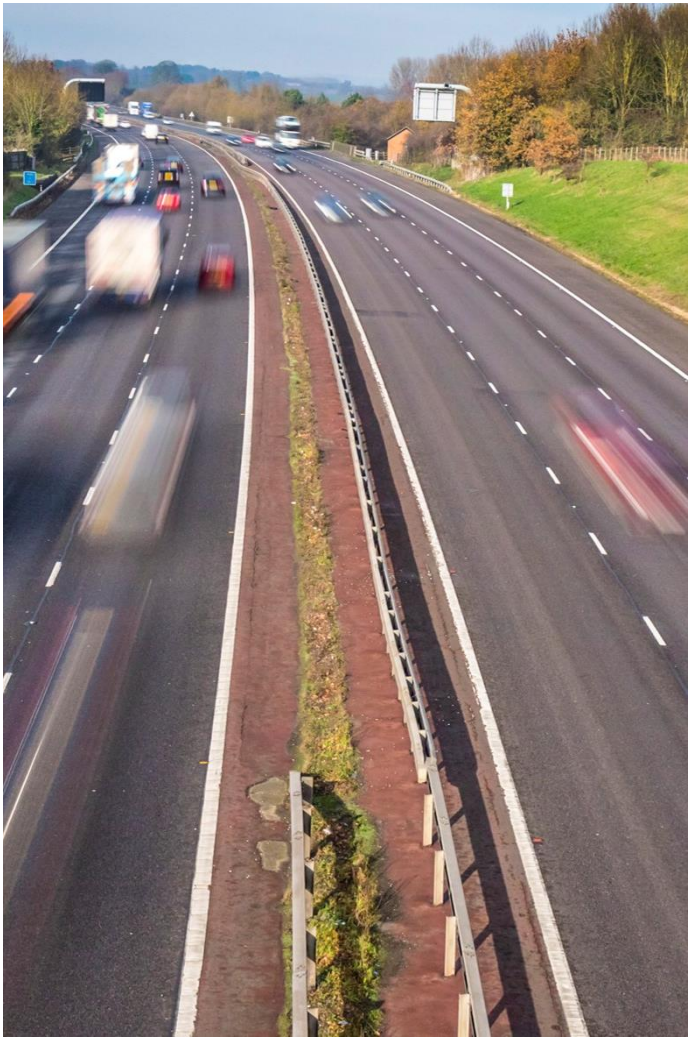
Please indicate how good or poor you rate the current quality of each one in the US...



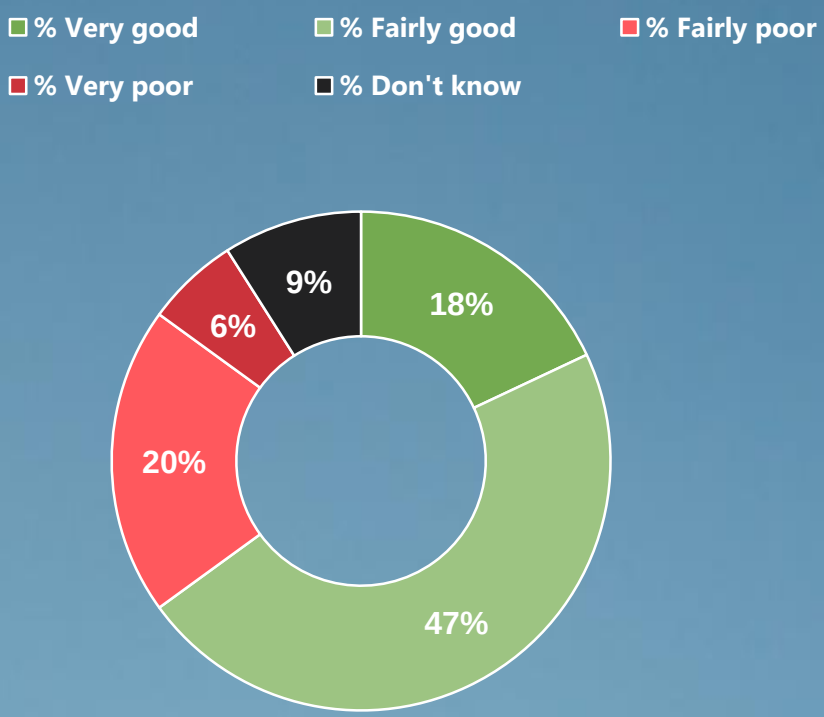
Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Transport

- Two-thirds of the public, 65%, rate airports positively.
- The public are more positive about the motorway/major road network than the local road network.
- Ratings are worst for flood defences.



Airports – positive ratings



Q

These next questions are about different types of infrastructure in the US.

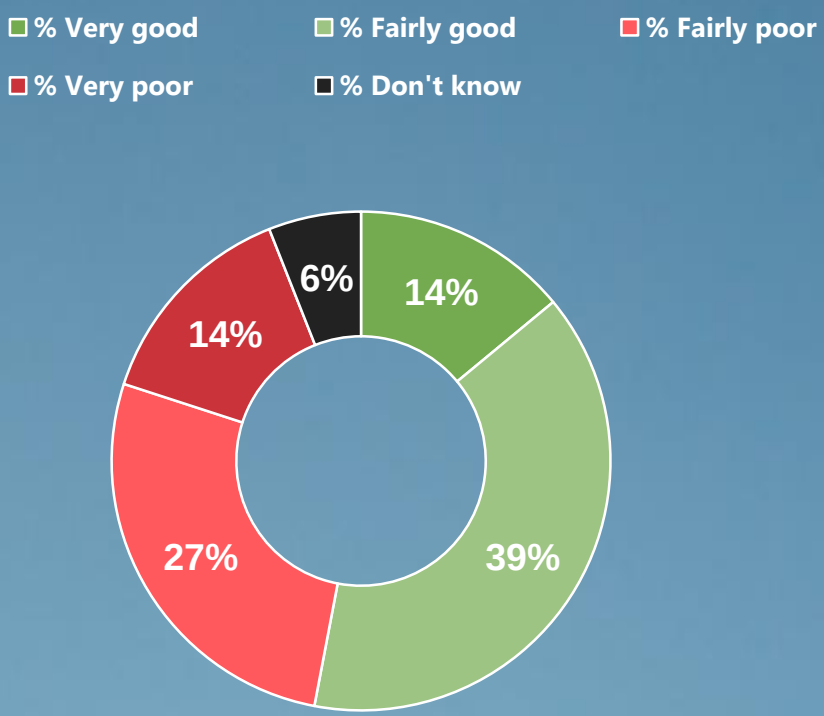
Please indicate how good or poor you rate the current quality of each one in the US...

Airports

Good	Poor
65%	26%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Major Roads– Half are positive



Q

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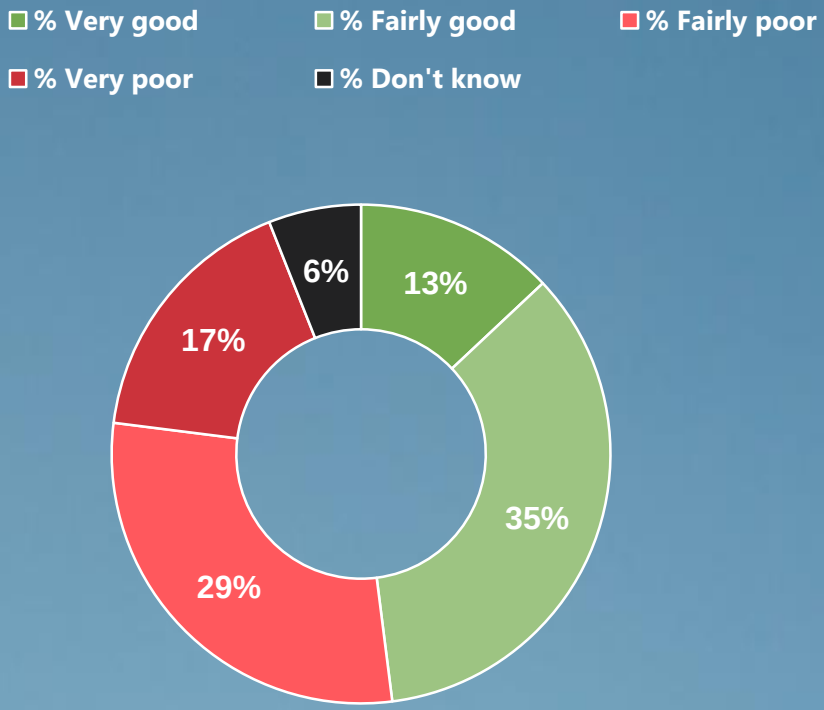
Please indicate how good or poor you rate the current quality of each one in the US...

The motorway/major road network

Good	Poor
53%	41%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Local roads – Almost half are positive



Q

These next questions are about different types of infrastructure in the US.

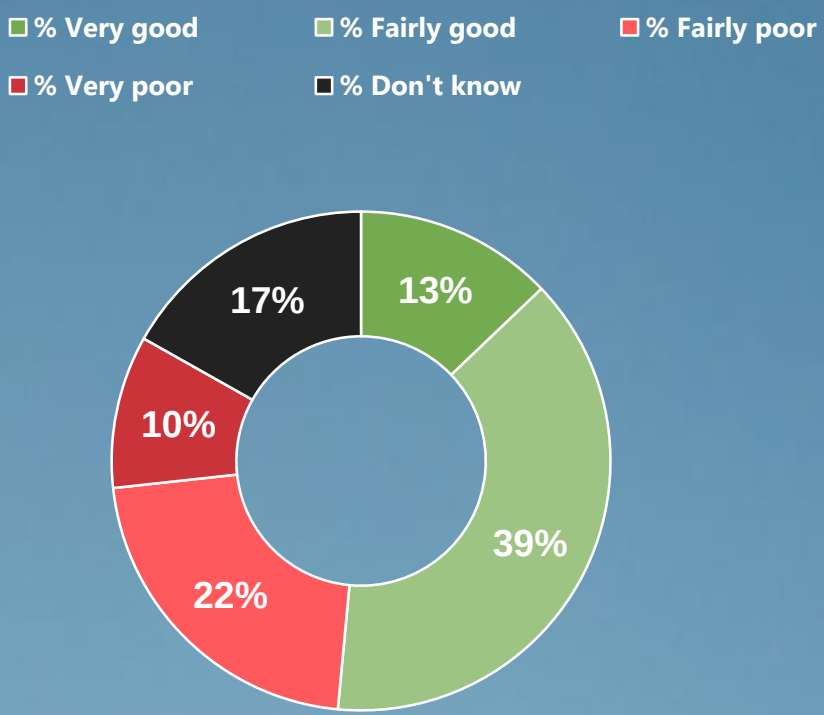
Please indicate how good or poor you rate the current quality of each one in the US...

The local road network

Good	Poor
48%	46%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Rail – more positive than negative



Q

These next questions are about different types of infrastructure in the US.

Please indicate how good or poor you rate the current quality of each one in the US...

Rail infrastructure – track/stations

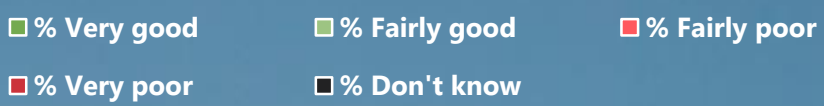
Good	Poor
51%	32%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Housing supply

- 28% of the public rate new housing supply as fairly or very poor in Britain.
- This includes 7% rating this as very poor.

Housing supply – 6 in 10 are positive



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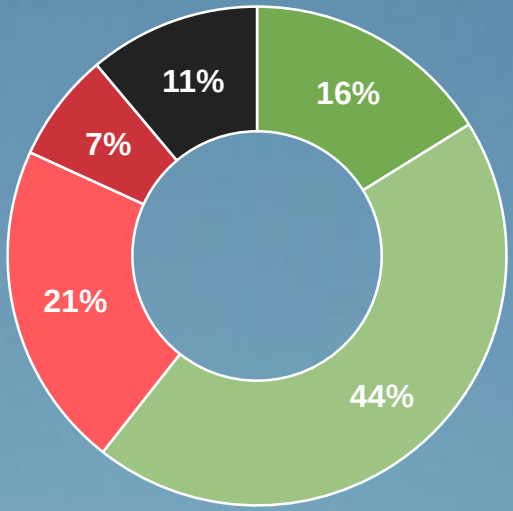
Please indicate how good or poor you rate the current quality of each one in the US...

New housing supply

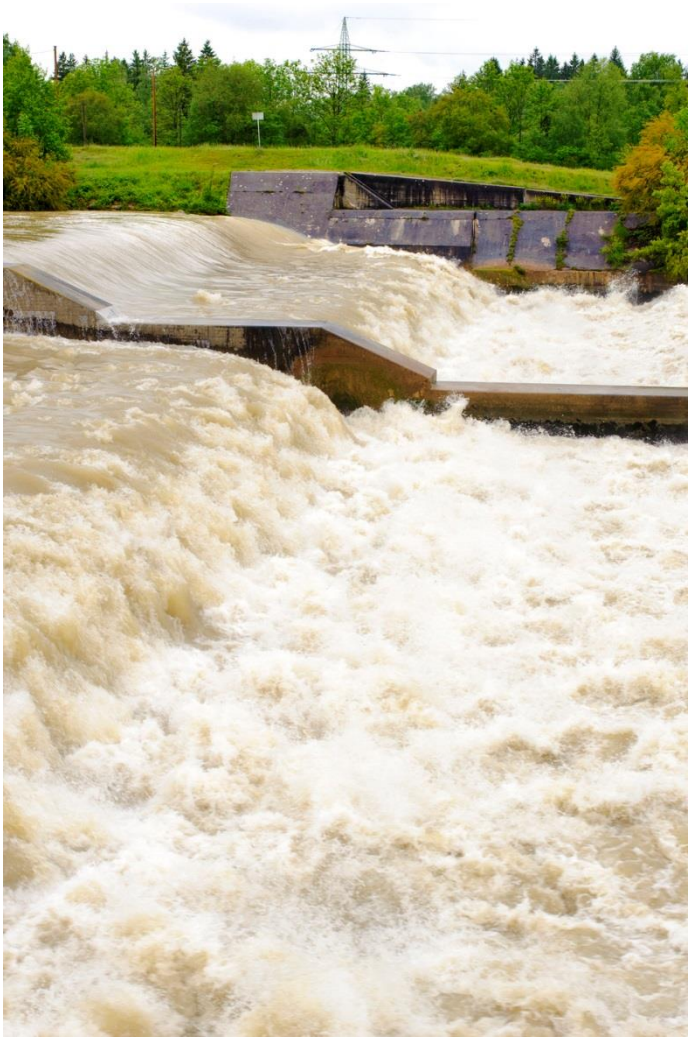


Good	Poor
60%	28%

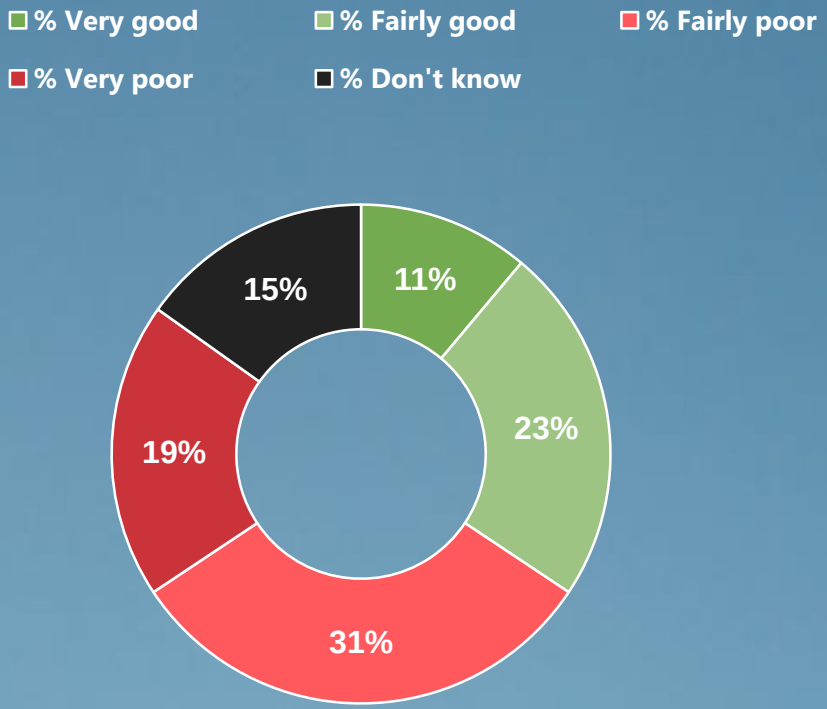
Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Environment & energy

- The public are significantly more negative than positive about flood defences.
- 48% are positive about energy-generation infrastructure (excluding nuclear), but 36% are negative, and 16% say they don't know.
- Even more, 24%, do not offer an opinion on nuclear infrastructure but, among those who do, the balance is slightly more positive than negative.



Flood defences – public negative over 15%



Q

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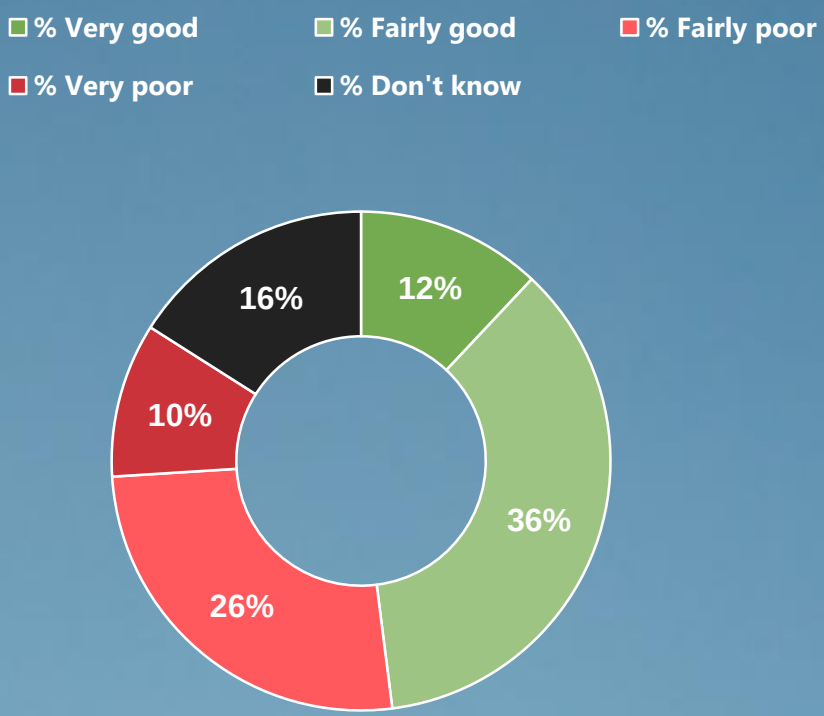
Please indicate how good or poor you rate the current quality of each one in the US...

Flood defences

Good	Poor
34%	51%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Non-nuclear energy – views more mixed



Q

These next questions are about different types of infrastructure in the US.

Please indicate how good or poor you rate the current quality of each one in the US...

Energy-generation infrastructure (excluding nuclear)

Good	Poor
48%	36%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Nuclear – a quarter don't know

Q

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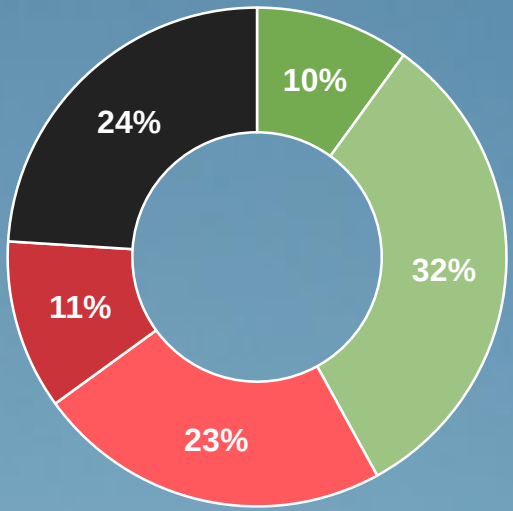
Nuclear infrastructure to generate energy



Good	Poor
42%	34%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Other utilities

- 13% rate water supply and sewerage as very good, with a further 45% judging it fairly good.
- Broadband attracts better ratings with 24% very/fairly poor compared to 68% very/fairly good.

Water supply etc. – ‘good’ by almost 25%

Q

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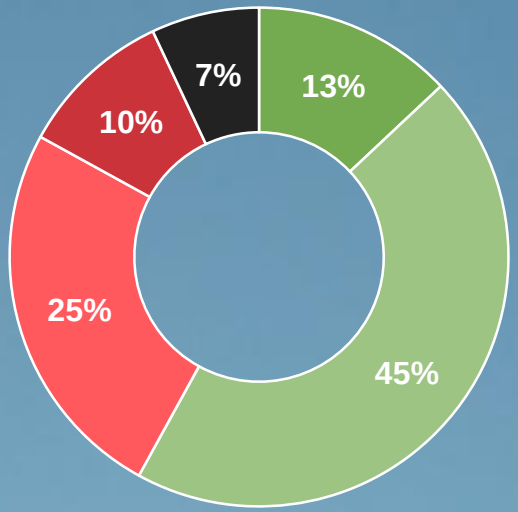
Please indicate how good or poor you rate the current quality of each one in the US...

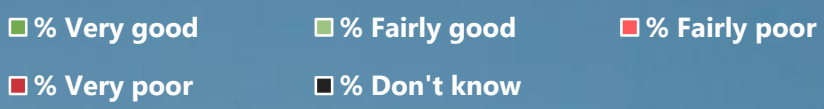
Water supply and sewerage



Good	Poor
59%	35%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Broadband – more positive than negative



Q

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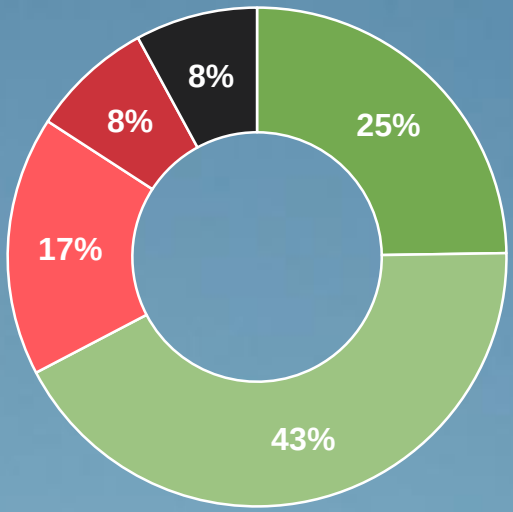
Please indicate how good or poor you rate the current quality of each one in the US...

High speed broadband



Good	Poor
68%	24%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

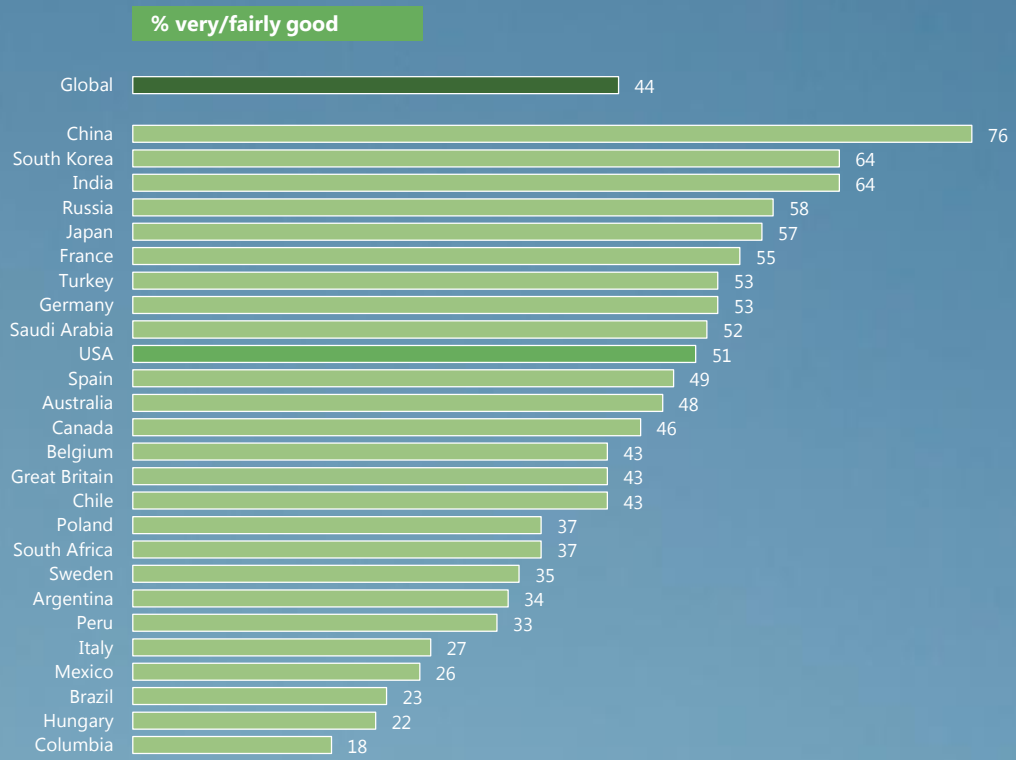
Rail infrastructure in line with other G8

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



Base: 18,517 adults (online), 26 Aug-9 Sept

New housing supply strongest in US

Q

These next questions are about different types of infrastructure.

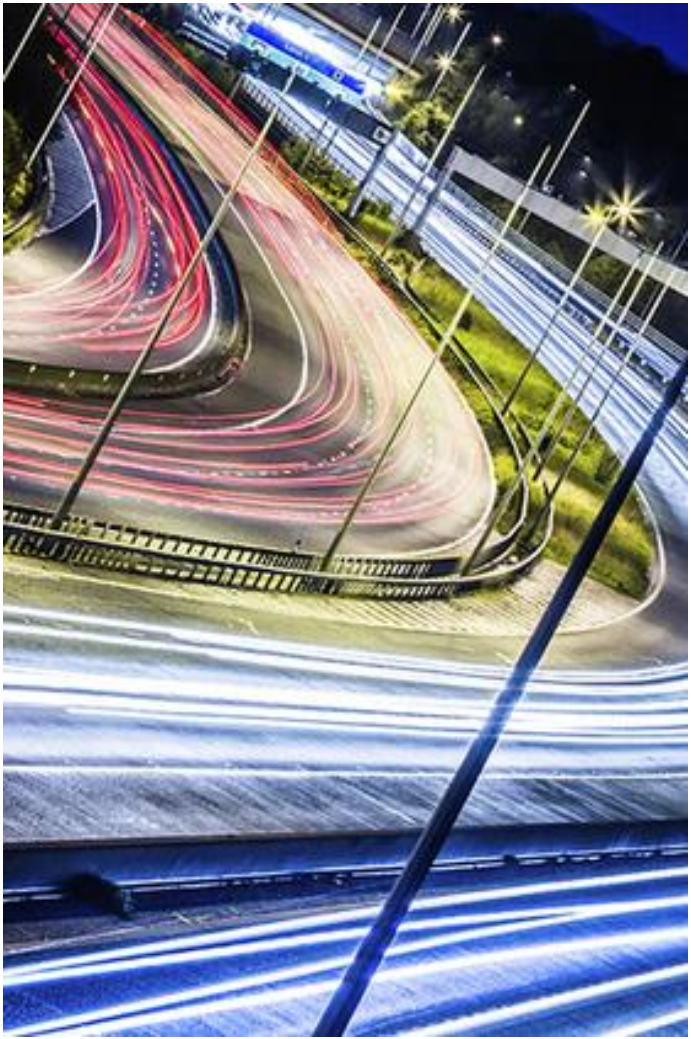
Please indicate how good or poor you rate the current quality of each one in [COUNTRY]…

New housing supply

Base: 18,517 adults (online), 26 Aug-9 Sept

Attitudes

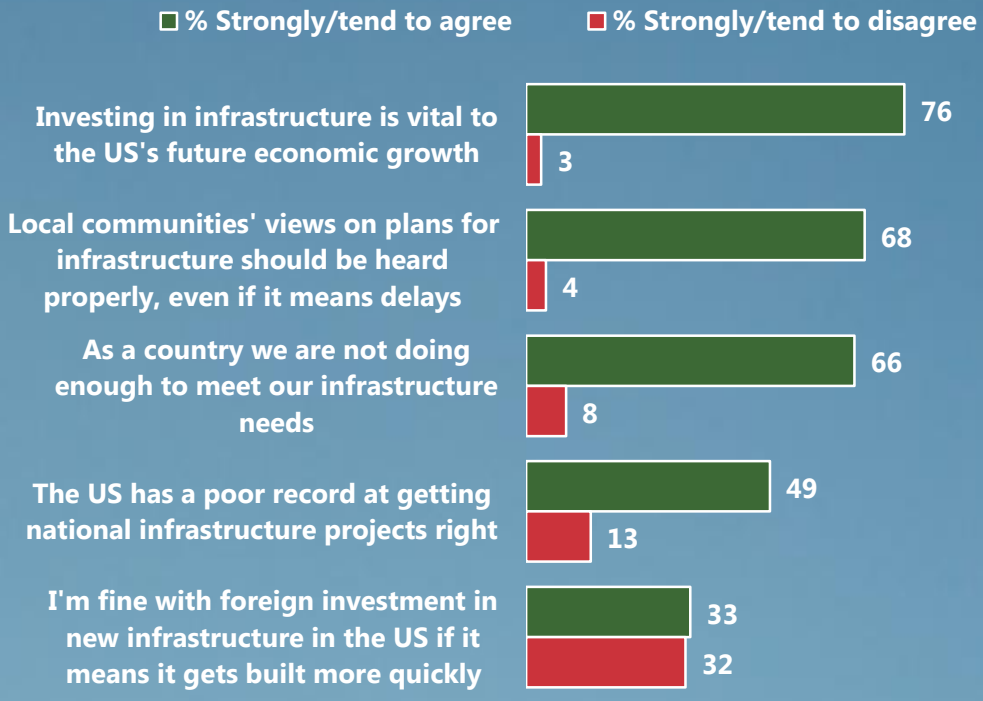
- 66% agree that 'we are not doing enough to meet our infrastructure needs', while 76% are of the view that investment in infrastructure is vital to future economic growth.
- At the same time, though, 68% justify delays to infrastructure projects if it means that local communities' views can be heard properly.



Attitudes push in different directions

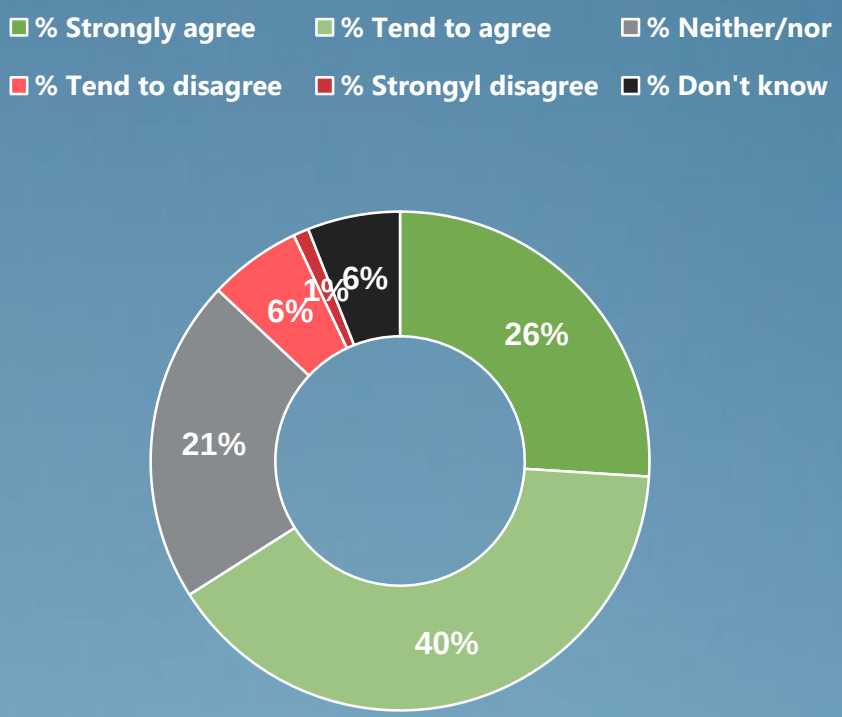
Q

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



Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Sense that US is doing well



Q

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

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

Agree	Disagree
66%	8%

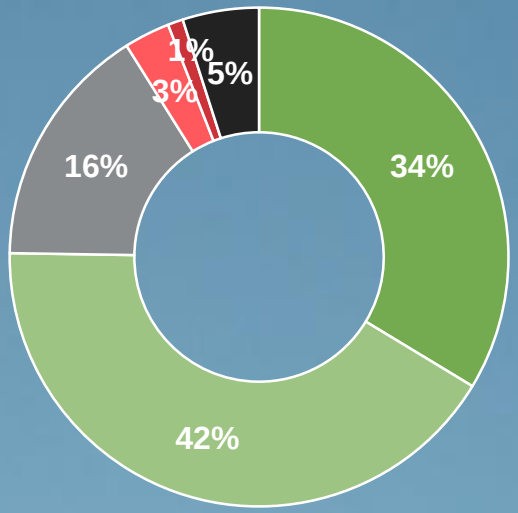
Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Infrastructure vital to growth

Q

To what extent do you agree or disagree…?

Investing in infrastructure is vital to the US's future economic growth



Agree	Disagree
76%	3%

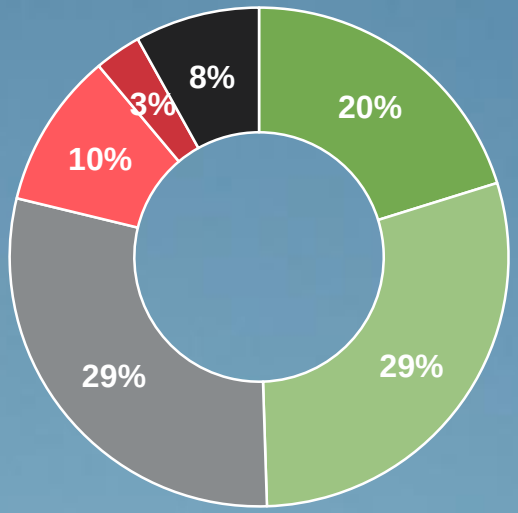
Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

By two thirds we have a good record

Q

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

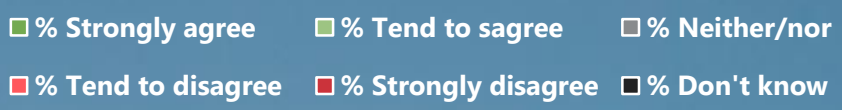
The US has a poor record at getting national infrastructure projects right



Agree	Disagree
49%	13%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

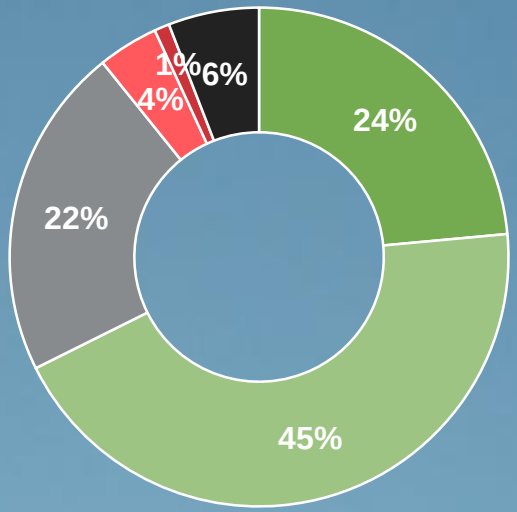
Local views matter



Q

To what extent do you agree or disagree…?

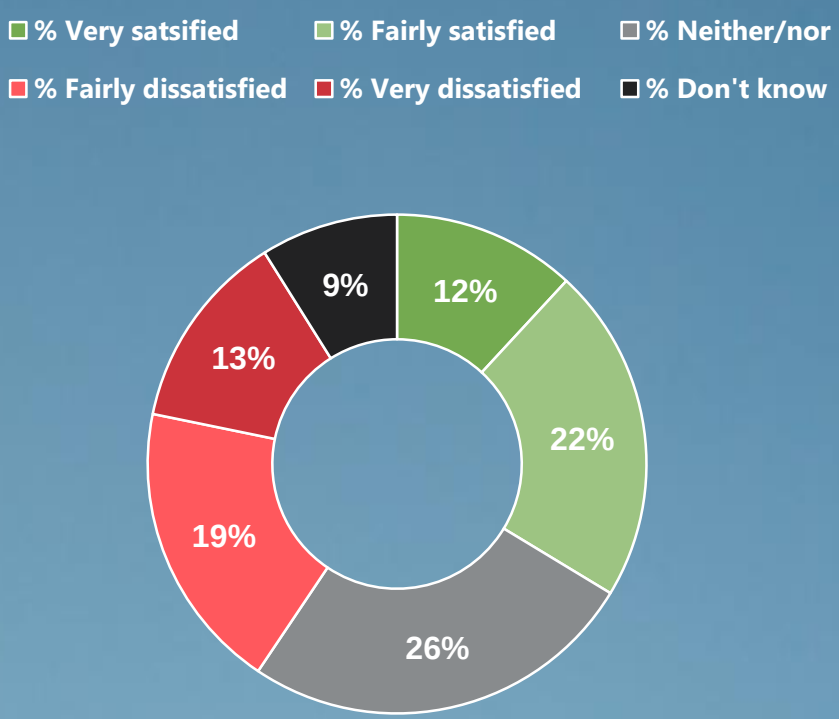
Local communities' views on plans for infrastructure should be heard properly, even if it means delays



Agree	Disagree
68%	4%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Only a third fine with foreign investment



Q

To what extent do you agree or disagree…?

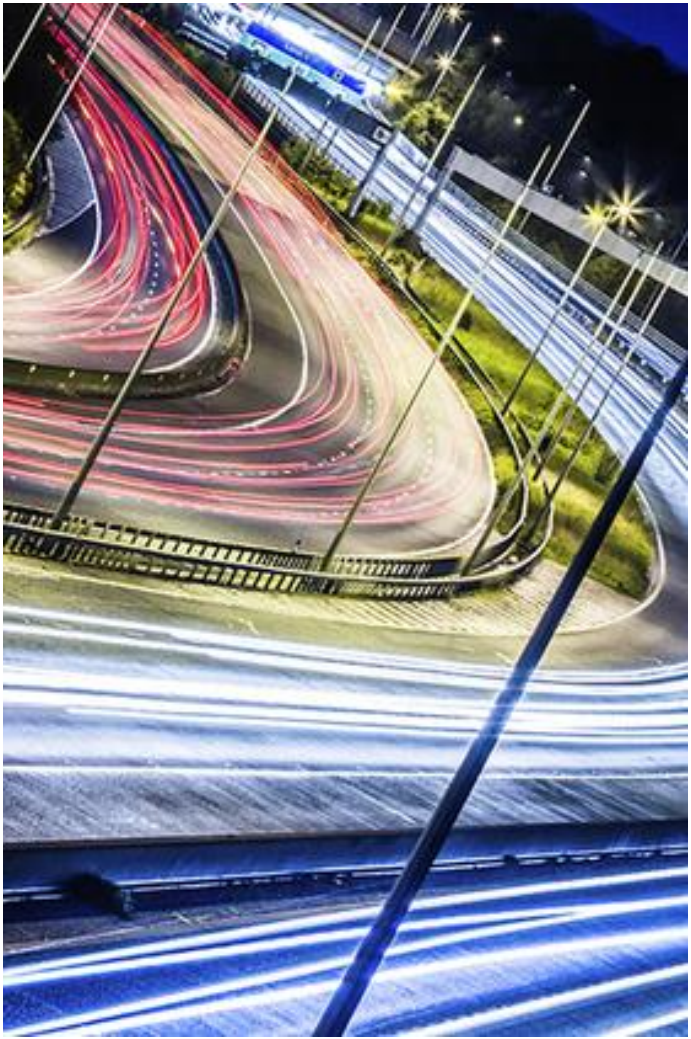
I'm fine with foreign investment in new infrastructure in the US if it means it gets built more quickly

Agree	Disagree
33%	32%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Priorities

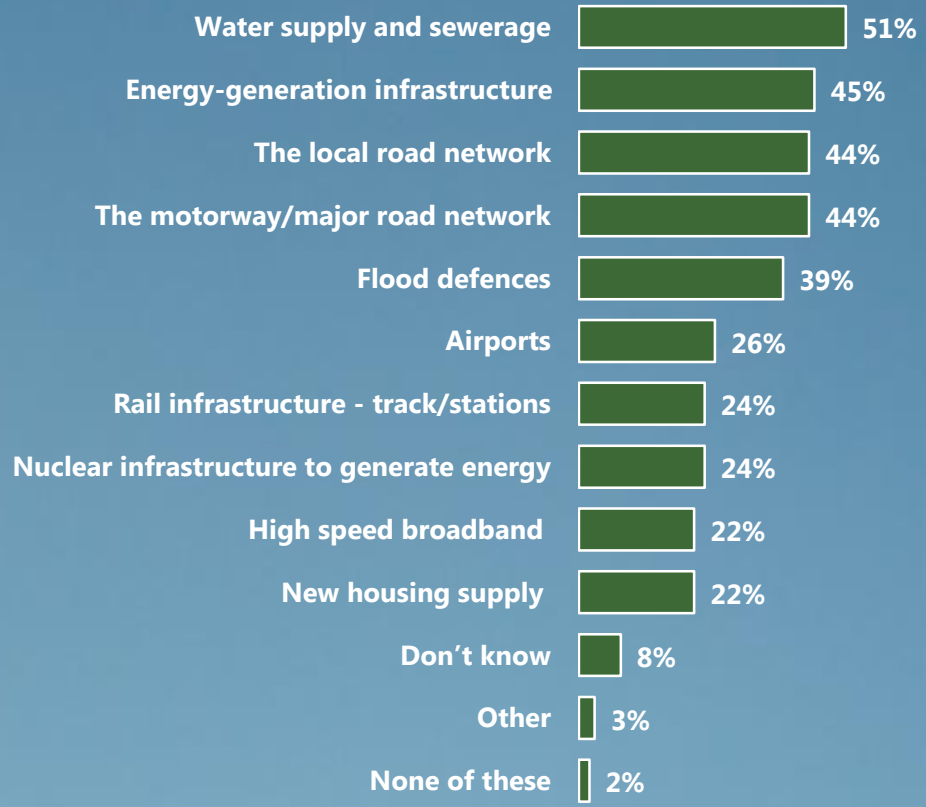
- Priorities for investment are water supply and sewerage (51% choose this from a list), energy generation infrastructure (excluding nuclear) (45%) and the local road network (44%).
- 31% back Government borrowing money to fund investment in better/more infrastructure, with 37% opposed and 27% unsure either way.



Housing, flood defence, rail are top priorities

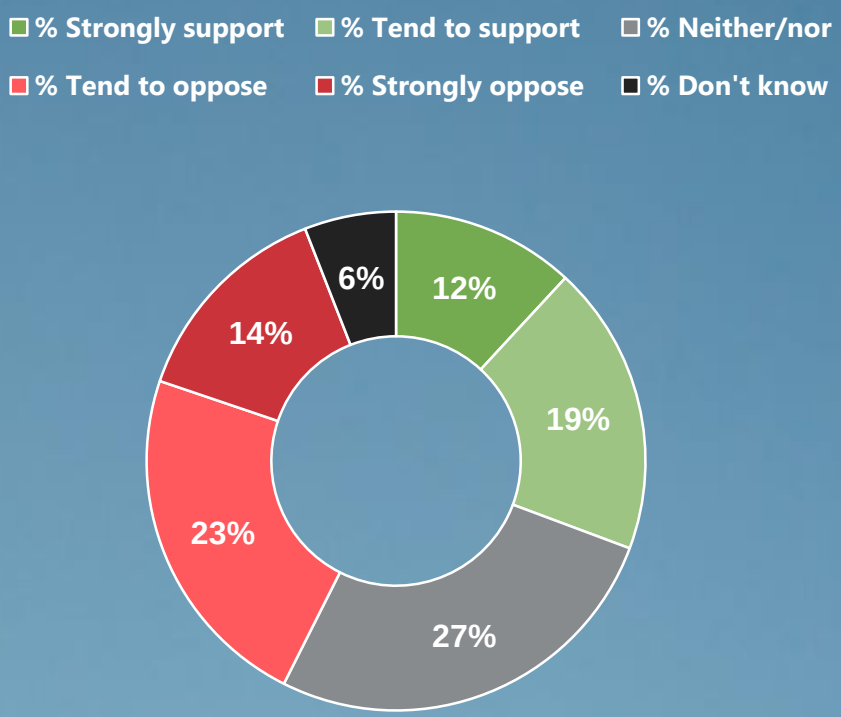
Q

Which of these types of infrastructure, if any, do you think should be made a priority for investment for the US?



Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Americans split on borrowing



Q

To what extent do you support or oppose the national Government in the US borrowing money to fund the building of more/better infrastructure?

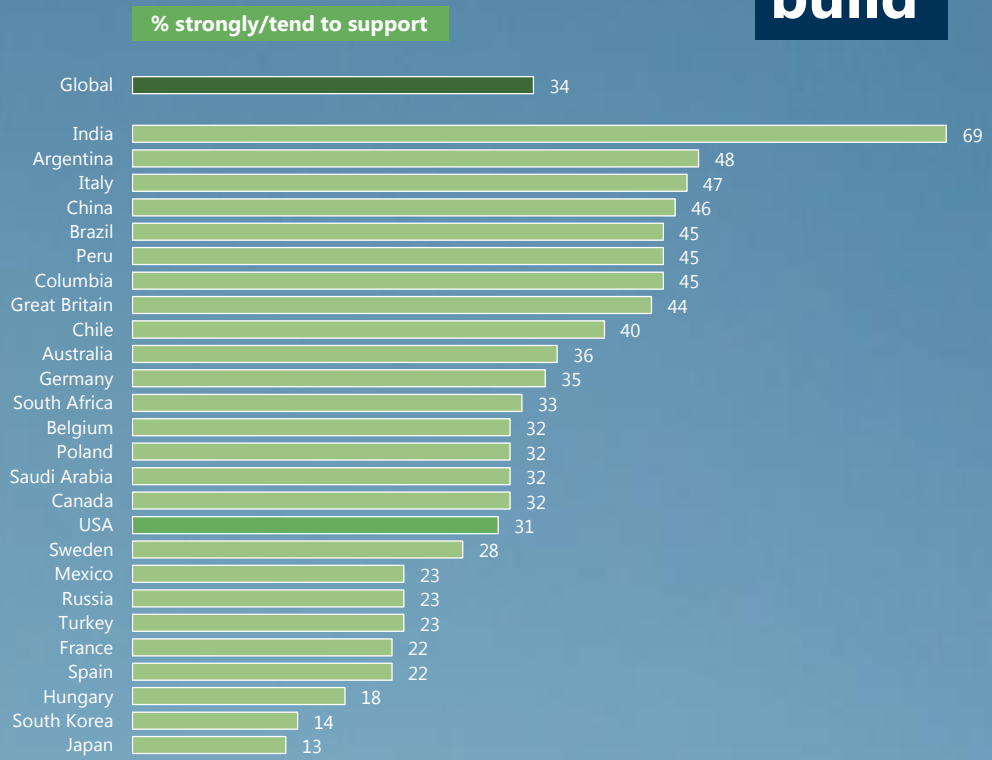
Support	Oppose
31%	37%

Base: 1,002 USA adults 18-65 (online), 26 Aug-9 Sept

Relatively less supportive of borrow-to-build

Q

To what extent do you support or oppose the national Government in [COUNTRY] borrowing money to fund the building of more/better infrastructure?



Base: 18,517 adults (online), 26 Aug-9 Sept

Summary

Public accept case for investment in infrastructure.

Wide variation in ratings of different types of infrastructure: water supply and energy infrastructure among top priorities.

Public split on the idea of foreign investment if it speeds progress. But also resistant to compromising proper hearing of local communities' views.

Ipsos MORI

Further information

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