



TO: Interested Parties

FROM: Association of Equipment Manufacturers

DATE: August 15, 2017

SUBJECT: Analysis of National Infrastructure Investment Poll

SUMMARY

In July 2017, the Association of Equipment Manufacturers (AEM) commissioned YouGov to conduct an online omnibus poll of over 3,000 adults to gauge perceptions and attitudes about the need for U.S. infrastructure investment among Americans living in different parts of the country.

The poll found that an overwhelming majority of Americans in urban, suburban and rural communities all agree that investing in infrastructure will improve the U.S. economy, amid otherwise sharp geographic divisions over politics. Eighty-nine (89) percent of all Americans believe that investments in infrastructure will strengthen the U.S. economy, including eight-six (86) percent of city residents and eighty-nine (89) percent of rural Americans.

Respondents also identified transportation, construction and manufacturing as the top industries poised to benefit most from increased infrastructure investment. Thirty (30) percent of all U.S. adults identified manufacturing as the top industry that would benefit most from infrastructure investment, a figure that increases among Midwesterners and rural Americans (34 percent).

The poll also found that a third of Americans (33 percent) believe that investing in broadband and wireless connectivity infrastructure would most benefit their ability to access educational and workforce training resources.

These findings support recommendations made in a broader report recently released by AEM called [The U.S. Infrastructure Advantage™](#). The report emphasizes the importance of the United States reclaiming its infrastructure advantage in order to maintain its global economic dominance. The report also highlights several areas in which

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infrastructure such as surface transportation and broadband provide critical links between urban and rural communities and economies.

KEY FINDINGS

- Among all adults, more than half (56 percent) think U.S. infrastructure is in bad condition compared to just 30 percent who say it is in good condition.
- More than eight out of every 10 (82 percent) Americans agree that investments in U.S. infrastructure will increase the number of jobs in their communities. Americans who live in the suburbs and towns agree at 84 percent; city residents at 82 percent; and rural Americans at 80 percent.
- A significant majority (81 percent) of Americans agree that investments in U.S. infrastructure will improve their personal quality of life. Eighty-two (82) percent of Americans living in suburbs and towns agree, as do eighty (80) percent of Americans living in cities, and seventy-nine (79) percent of rural Americans.
- Half of Americans (50 percent) believe the transportation industry will be one of three industries to benefit most from infrastructure investment. Construction is a close second to transportation with 46 percent. Manufacturing ranks third with 30 percent of Americans believing that this industry will benefit most from infrastructure investment.
- More than one in three (32 percent) of rural residents, those living in a suburb or town (31 percent), and city dwellers (35 percent) rank “increased access to education and workforce training” as a top three benefit of broadband and wireless investments.

DETAILED FINDINGS

While many issues divide rural and urban America, there is one issue that unites our increasingly divided country: infrastructure.

According to the poll, an overwhelming majority of Americans across the rural, suburban and city spectrum believe that investments in infrastructure will strengthen the U.S. economy, increase jobs and improve the quality of life:

- Eighty-nine (89) percent of Americans agree that investing in infrastructure will improve the U.S. economy.
 - Americans who live in the suburbs or towns agree at 91 percent,

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- Rural Americans agree at 89 percent, and
- City residents agree at 86 percent.
- Eighty-two (82) percent of Americans agree that investments in U.S. infrastructure will increase the number of jobs in their communities.
 - Americans who live in the suburbs or towns agree at 84 percent,
 - City residents agree at 82 percent, and
 - Rural Americans agree at 80 percent.
- Eighty-one (81) percent of Americans agree that investments in U.S. infrastructure will improve their personal quality of life.
 - Americans who live in the suburbs or towns agree at 82 percent,
 - City residents agree at 80 percent, and
 - Rural Americans agree at 79 percent.

This finding supports a key point in *The U.S. Infrastructure Advantage™* report that infrastructure is the common bond between rural and urban America – both literally and physically.

A majority of Americans still believe U.S. infrastructure is in bad condition, with people living outside of city centers the most pessimistic.

Across the country, people in all types of communities think U.S. infrastructure is in bad condition.

- Among all adults, more than half (56 percent) think U.S. infrastructure is in bad condition compared to just thirty (30) percent who say it is in good condition.
- This view is even more pronounced among suburban and town residents (60 percent say infrastructure is in bad condition and 28 percent in good condition) and rural residents (57 percent say infrastructure is in bad condition and 26 percent in good condition).

Americans remain dissatisfied with the state of U.S. infrastructure. In an earlier survey released by AEM in August 2016, a significant majority of respondents (80 – 90 percent) said U.S. roads, bridges, and energy grids were in some or extreme need of repairs. As highlighted in *The U.S. Infrastructure Advantage™* report, the U.S. is currently investing half of what it spent on transportation infrastructure more than 50 years ago as a percentage of the gross domestic product.

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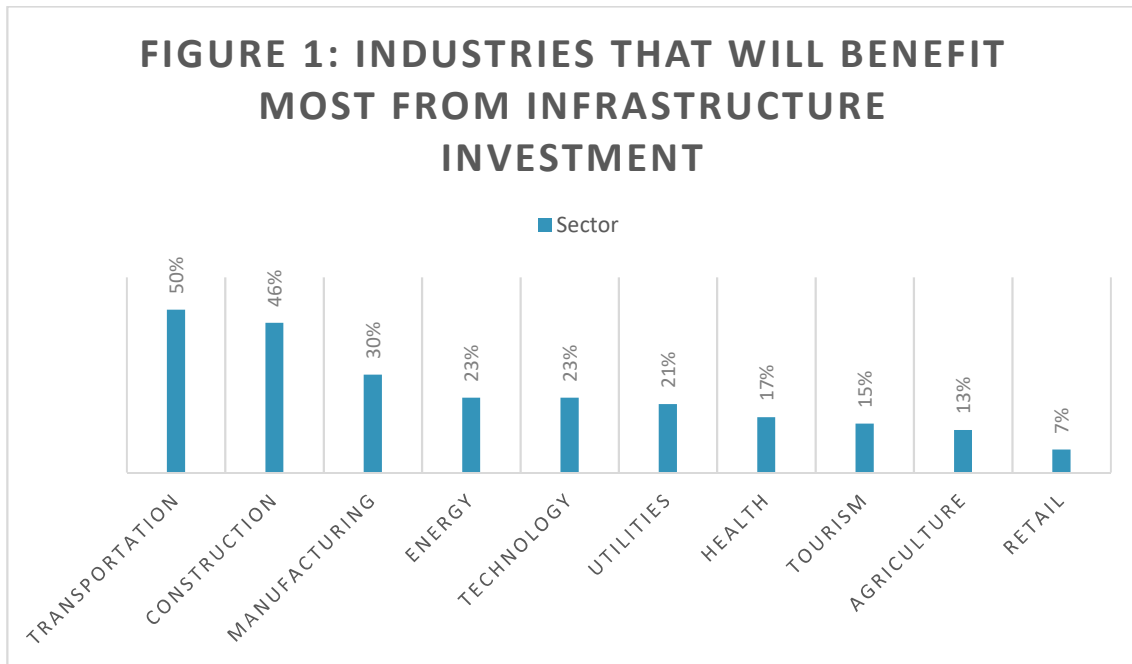
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Americans believe transportation, construction and manufacturing industries will benefit the most from infrastructure investment.

Half of Americans (50 percent) believe the transportation industry will benefit the most from infrastructure investment, with construction a close second (46 percent). Manufacturing ranks third with thirty (30) percent of Americans believing that this industry will benefit most from infrastructure investment (see **Figure 1**).



Looking at specific areas and regions of the country, rural Americans and Midwesterners are more likely than others to say that the manufacturing industry will benefit most from infrastructure investment (see **Table 1**).

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TABLE 1: BELIEF THAT INFRASTRUCTURE INVESTMENT WILL BENEFIT MANUFACTURING INDUSTRY

AREA:	REGION
RURAL: 34 PERCENT	MIDWEST: 34 PERCENT
SUBURBAN: 30 PERCENT	SOUTH: 30 PERCENT
URBAN: 27 PERCENT	NORTHEAST: 28 PERCENT
	WEST: 26 PERCENT

Americans name improved education and workforce training opportunities as the top personal benefits associated with broadband and wireless internet infrastructure investments.

When asked about the potential benefits of investments in broadband and wireless connectivity, thirty-two (32) percent of rural, thirty-one (31) percent of suburban and thirty-five (35) percent of urban residents all rank “increased access to education and workforce training” as a top benefit of investments in broadband and wireless connectivity infrastructure.

Other benefits also rank high (see **Figure 2**) on both the personal and at the broader community level:

- On the personal level, one in three (32 percent) of Americans think they are most likely to benefit from “increased access to information, allowing me to stay up to date with the latest news and developments.”
- At the community level, one in three (30 percent) of Americans rank “increased safety in my local community through news alerts, faster connectivity, and automated services” as a top benefit, while the same number think they are most likely to benefit from an “increased number of jobs in my local community.”

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FIGURE 2: PERCEIVED BENEFITS OF INVESTMENT IN
BROADBAND INFRASTRUCTURE



The poll results underscore recommendations made in AEM’s report, *The U.S. Infrastructure Advantage™*, to support policies that provide broadband connectivity in urban and rural parts of the country as both areas stand to benefit from such investments.

ABOUT THE POLL

AEM conducted the poll in partnership with YouGov through its online omnibus survey. The survey was fielded to 3,481 U.S. adults, including 667 adults who self-identify as living in a rural area. Figures have been weighted and are representative of all American adults (18+). Fieldwork was conducted between July 26 and July 28, 2017.

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