



ASSOCIATION OF
EQUIPMENT MANUFACTURERS

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TO: Interested Parties

FROM: Association of Equipment Manufacturers

DATE: August 9, 2016

SUBJECT: Analysis of National Infrastructure Poll

SUMMARY

In June 2016, the Association of Equipment Manufacturers commissioned Morning Consult to conduct an online national poll of nearly 2,000 registered voters to gauge perceptions and attitudes about current and future U.S. infrastructure.

The poll found that a majority of Americans recognize the declining state of the nation's infrastructure as an issue that should be addressed, and nearly half (46 percent) of respondents said that U.S. infrastructure has gotten worse in the last five years. Roads and bridges top the list of sectors of the nation's infrastructure in extreme need of repair, but registered voters also believe that repairs should be made to railways, dams and water pipelines.

When it comes to funding, half (49 percent) of the surveyed population believes that the federal government is primarily responsible for funding repairs to the nation's infrastructure, but they also believe that state (76 percent), local (70 percent) and federal (72 percent) government should be doing more to improve infrastructure across the board.

There are notable differences across political affiliation, but when it comes to the quality of roads, bridges and energy grids (the three sectors of infrastructure that first come to mind among registered voters), there is general agreement among Democrats, Independents and Republicans about the quality of each of them.

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The national poll shows broad bipartisan support for infrastructure prioritization and investment. Both presidential nominees have spoken about the importance of investing in the future of U.S. infrastructure. As they begin to offer further details about their plans for that investment, the findings of the poll provide insight into what voters think specifically should be a part of that future. Regardless of political affiliation, water infrastructure, solar powered homes, smart infrastructure, and high-speed trains are seen as most important to the future of U.S. infrastructure by individuals surveyed, whereas self-driving cars and drones delivering packages are lower on the list of priorities.

KEY FINDINGS

- Nearly half (46 percent) of registered voters believe that the state of the nation's infrastructure has gotten worse in the last five years.
- A significant majority (80 – 90 percent) of registered voters say that roads, bridges and energy grids are in some or extreme need of repairs.
- Half (49 percent) of the surveyed population feel that the federal government is primarily responsible for funding repairs to the nation's infrastructure.
- Seven out of every 10 registered voters say increasing federal funding for infrastructure will have a positive impact on the economy.
- More than eight out of every ten Americans consider water infrastructure (86 percent), solar powered homes (83 percent) and smart infrastructure (82 percent) as the top three important innovations for the future of infrastructure.

DETAILED FINDINGS

The declining state of U.S. infrastructure...and the need for repairs

Nearly half (46 percent) of individuals surveyed said that the state of the nation's infrastructure has gotten worse in the last five years. With respect to political affiliation, there is a notable difference between Democrats (41 percent), Independents (46 percent) and Republicans (53 percent) on this issue.

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There is greater alignment across party lines regarding the quality of different sectors of infrastructure, with roughly one in three Democrats, Independents and Republicans all agreeing on the poor quality of roads and bridges.

When it comes to the sectors of the nation's infrastructure in need of repairs, an overwhelming majority of registered voters say that roads (92 percent), bridges (89 percent), water pipelines (88 percent), energy grids (80 percent), railways (80 percent) and dams (76 percent) are all in some to extreme need of repairs.

Infrastructure funding is a critical issue...and the federal government has a role to play

Nearly half of registered voters believe that the federal government is primarily responsible for both funding repairs (49 percent) and paying to modernize (48 percent) the nation's infrastructure. Not surprisingly, a clear majority (54 percent respectively) of Democrats share these views, but four out of every 10 (42 percent) Republicans also believe that the federal government has a role to play.

Nearly seven in 10 (68 percent) registered voters say that an increase in federal funding for infrastructure would have a positive impact on the economy. This is true across party affiliation, with Democrats (72 percent), Independents (65 percent) and Republicans (65 percent) all recognizing the positive impact on the economy as a result of greater federal funding for infrastructure.

Registered voters also feel that government across the board should be doing more to improve the nation's overall infrastructure, with 76 percent of individuals surveyed wanting more from state governments, 72 percent looking to the federal government to do more and 70 percent expecting more from local governments.

Roads remain top of mind...but bridges and energy grids are important as well

Roads remain top of mind with registered voters, with one in three (35 percent) individuals surveyed indicating that roads are the first thing that comes to mind when

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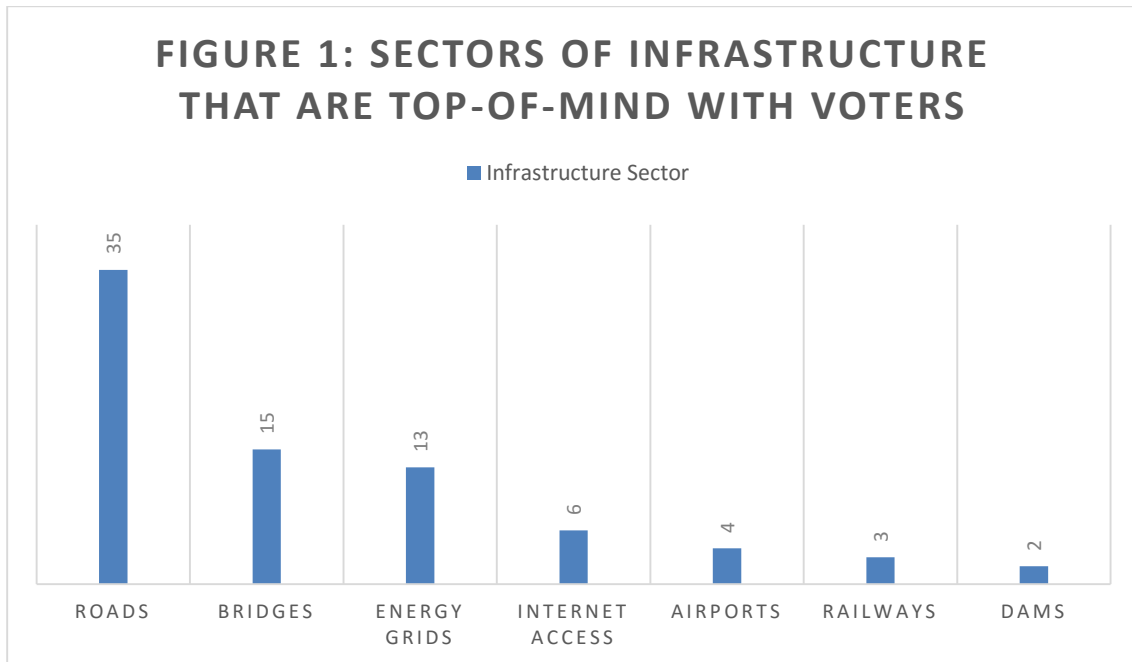
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thinking about the nation's infrastructure, followed by bridges (15 percent) and energy grids (13 percent) (see **Figure 1**). It is interesting to note that this holds true across political affiliation, with Democrats (34 percent), Independents (35 percent) and Republications (36 percent) overwhelmingly saying that roads are top-of-mind when thinking about various infrastructure sectors.



There are important generational differences in views on U.S. infrastructure

Older registered voters have a much less favorable view of our nation's current infrastructure and while they value innovation, younger generations are the ones who say advanced, technological innovations are important.

Across the board, older voters are more concerned with the current state of our nation's infrastructure compared to younger voters. Specifically, 63 percent of 35-44 year-olds

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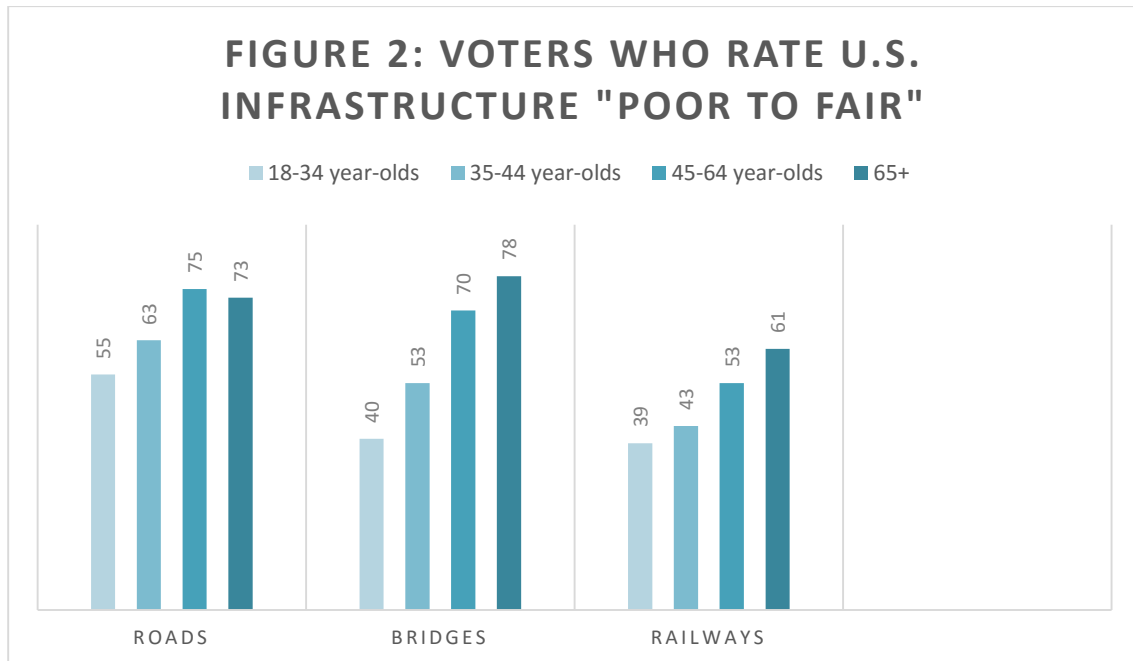
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75 percent of 45-64 year-olds and 73 percent of those 65 and older rated U.S. roads as fair or poor, while only 55 percent of 18-34 year-olds expressed the same concern. As shown in **Figure 2**, the same holds true for our nation's bridges and railways.



With regard to innovation, voters see water infrastructure (86 percent), solar powered homes (83 percent) and smarter infrastructure (82 percent) as the top three most important innovations for the future of U.S. infrastructure. Of note, older voters feel most strongly about smarter infrastructure (19 percent among 45-64 year-olds and 21 percent among 65+, compared to just 9 percent among millennials). However, millennials place a significantly higher value on even more forward-thinking innovations and advanced technologies such as vertical farms, self-driving cars and drones (see **Figure 3**).

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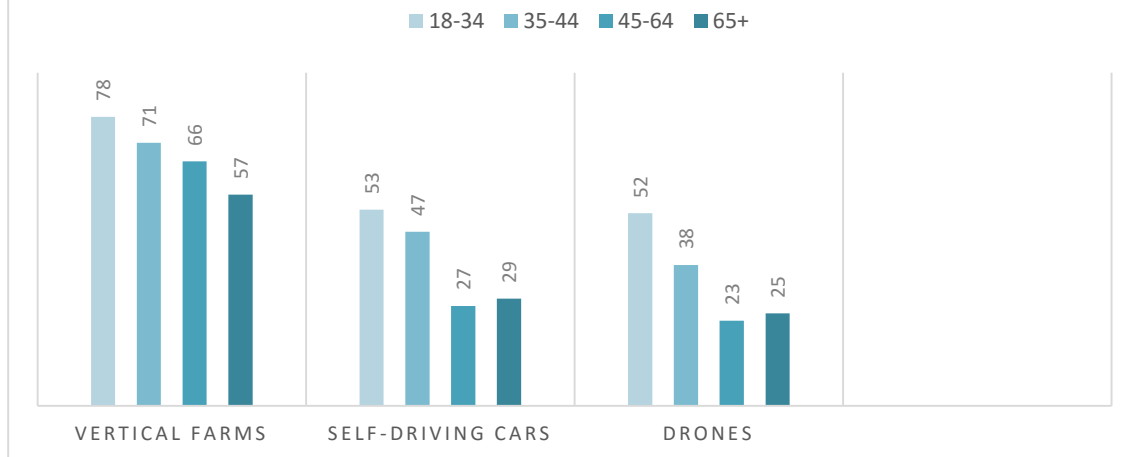
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FIGURE 3: VOTERS WHO RATE ADVANCED TECHNOLOGIES AS "IMPORTANT" TO FUTURE OF INFRASTRUCTURE



It is important to note that the technology that most registered voters would most like to see implemented by 2050 is solar powered homes.

Energy grids are important to both urban and rural Americans

One in five (22 percent) registered voters indicated that they would like to see energy grids reinvented, while the same number (19 percent) of individuals surveyed say that energy grids are in need of modernization (just behind roads). There is a notable distinction between urban and rural/suburban registered voters, with one in five (20 percent) of rural/suburban dwellers believe that energy grids are most in need of modernization while 15 percent of urban residents share that sentiment.

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Crumbling infrastructure motivates voters to support increased infrastructure funding

The poll shows that voters clearly recognize the link between infrastructure investment and economic prosperity. But there are notable differences in what motivates voters to support increased federal funding. When told that one in nine of the nation's bridges are rated as structurally deficient and that many drinking water pipes across the country are over 100 years old, more than half (52 and 54 percent respectively) of registered voters say they are much more likely to support increased federal funding for the nation's infrastructure. The fact that the United States invests less than two percent of its budget on infrastructure compared to nine percent in China is less convincing, with 45 percent of voters stating that this is a motivating factor for greater federal funding for infrastructure.

ABOUT THE POLL

The poll was conducted from June 17-20, 2016, among a national sample of 1,975 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on age, race/ethnicity, gender, educational attainment, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

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