

MEMORANDUM

TO: Allstate
FROM: FTI Consulting
DATE: 4 / 28 / 14
RE: Allstate/National Journal Heartland Monitor XX Key Findings

This memorandum outlines key findings from the nationally representative survey conducted April 9-13, 2014 among N=1,000 American adults age 18+ reached via landline and cell phone. The margin of error for the N=1,000 telephone sample is +/- 3.1%. This research investigates Americans' views on important issues facing the country, the extent to which institutions are helping or hurting the country's progress on these issues, and the actions Americans are personally taking to make a difference on issues they care about.

SUMMARY OF SURVEY FINDINGS

This twentieth installment of the Heartland Monitor Poll is a snapshot of American opinion during a period of modest yet uneven economic growth and on the eve of a likely contentious mid-term election season. Over the past five years, the Heartland Monitor poll has tracked Americans' opinions on a host of economic and personal financial topics. It has covered the optimism of a new Obama presidency, the hope for American economic recovery and the anxiety of a Middle Class trying to find their footing in a challenging economic environment.

Throughout these polls, we've measured a high level of cynicism among the American public towards the country's major institutions and leadership. This latest survey tells a similar tale, with a high level of concern about the direction of the country on nearly every important issue, and a belief by 70% of Americans that the country needs major changes.

But, more importantly, as we've seen throughout the history of the Heartland Monitor polls, Americans are remarkably resilient and optimistic about their own abilities and the country's potential. The survey shows that Americans recognize that change will be an uphill climb, but they also believe that average Americans can make a difference on important issues through their own individual actions. Americans believe that direct action like volunteering can be particularly effective, and they think that their day-to-day life would be more positively affected by an increase in community volunteerism than having a President that agrees with them on the issues.

After all, Americans recognize that the biggest social changes in the country's history have come about not because of "top-down" government policies, but through popular movements led by average Americans. Thinking about today's challenges, Americans believe that the public can and should take the lead to change and improve the country, and that change should come through social movements, community volunteerism, and through public participation in the democratic process.

KEY FINDINGS**I. THERE IS A BELIEF THAT AVERAGE AMERICANS CAN MAKE AND HAVE MADE A DIFFERENCE, ESPECIALLY ON LOCAL AND COMMUNITY ISSUES**

- While they're most concerned about issues facing the country as a whole, survey respondents believe that average Americans can, through their own actions, make the greatest difference in their own neighborhood or community.
 - Fully 60% believe that average Americans can make A Great Deal of difference on neighborhood/community issues, about half as many (30%) think the same can be done on issues facing the country, and just 20% believe that average Americans can make A Great Deal of difference on issues facing the world.
 - Still, majorities believe that average Americans can make at least "some" difference everywhere, including their community (90%), the country (71%), and the world (51%).
- Average Americans are seen to have at least some ability to make a difference on a range of issues. At least seven-in-ten believe that average Americans can take action and make a difference on the environment, the quality of K-12 education, equal rights for all Americans, and reducing crime and domestic violence.
 - Six-in-ten or more believe that average Americans can have some impact on protecting liberties, growing the economy, making it easier to start and run a business, providing public spending, and reducing poverty.
 - And, majorities believe that average Americans can have an impact on producing domestic energy, protecting privacy, and protecting Social Security and Medicare.
 - Americans are less convinced about what the average person can do on improving healthcare, keeping college affordable, and reducing taxes and government spending.
- How can average Americans really make a significant difference on these complicated national issues? When asked about the effectiveness of several actions and options for promoting change, 80% believe that "taking direct action like volunteering" would be effective, 67% believe the same about "volunteering or contributing to elect candidates who agree with you," 66% say "organizing other people to express similar views," and 59% say "using your buying power to influence companies."

- Seen as less effective are “participating in a public protest or demonstration” (44%) and “posting your views online through social media” (42%).
- A slight plurality (41%) believes that average Americans have more ability to make a difference on issues they care about than previous generations had. About three-in-ten (31%) believe that Americans today have less ability to make a difference, and one-in-four (26%) believe things haven’t really changed.
 - Views on this issue are dramatically different among Whites (35% more ability/35% less), African-Americans (59% more), and Hispanics (60% more).
- Regarding what would have a more positive impact on their day-to-day life, more Americans say “an increase in people volunteering in (their) community” (56%) than who say “electing a President who agrees with you on the issues”(39%).
 - Perhaps due to highly partisan views of the current President, more than half (53%) of Republicans think that electing an agreeable President would have a greater impact than an increase in community volunteerism. Both Democrats (65%) and Independents (59%) believe that volunteerism would have a greater impact.
- Americans believe that the event with the potential for the most meaningful and lasting impact on issues they care about would be “a social movement started by average Americans” (42%). This is seen as slightly more impactful than “the election of more people who agree with me on the issues” (32%). Both far surpass “a public private partnership” (9%) and “a public initiative launched by business” (8%).
- Three-in-four (74%) Americans believe that the major social changes in America’s history (like the civil rights movement, women’s suffrage, and others) have come about because of average Americans leading on the issue rather than because of government leading by setting policy before a consensus emerged (18%).
- Given a list of major social and political movements in recent American history, there are differing opinions about where average Americans have had the most impact. Overall, the two events seen as most impacted by the actions of average Americans are “civil rights for minorities” (28%) and “low taxes and smaller government” (26%).
 - These two take prominence over “women’s equality” (10%), “environmental protection” (7%), “worker pay and safety” (7%), “gay rights” (5%), and “consumer and product safety” (5%).

- Whites and Hispanics are split between civil rights and low taxes/small government, while African-Americans believe the civil rights movement was the event most impacted by average Americans.
- More than half of Republicans (51%) think that average Americans had the most impact on low taxes and small government, while 42% of Democrats pointed to the civil rights movement.

II. AMERICANS SEE CHANGE AS AN UPHILL CLIMB, BUT MOST STILL VIEW THE DEMOCRATIC PROCESS AS THE BEST VEHICLE FOR ACTION

- Despite a plurality believing that today's Americans have more ability to make a difference than previous generations, more than half (51%) believe that making a difference is actually becoming more difficult today. Just 9% say it's becoming easier for average Americans to make a difference on issues they care about, and 39% think that things haven't changed much.
 - Those who are most active and involved in issues are the most frustrated, with 62% saying it's becoming more difficult to make a difference.
 - Young Americans (age 18-29) differ from every other age group on this issue. Just 33% believe it's becoming more difficult to make a difference.
- Looking to the future, a majority (52%) of Americans think that government and business will become more removed from average people, making more decisions without input from the public. A minority, 41%, think that in the future, average people will be more connected through the internet and will be able to more easily group together on issues and cause change.
- Given two points of view about the best way to impact change, a majority (55%) believes that, even though "government may not be working well, the best way to affect the most people possible is for people to participate in the democratic process and make government work better." The less popular choice, supported by 39%, is that "government is broken and unable to make a positive impact on important issues, so the best way to have a positive impact is for people to group together and take direct action in their own communities."
 - The desire to circumvent the government and take direct action is seen most among Republicans, perhaps frustrated with the current administration. But, a majority of Republicans, and indeed all groups, still supports the democratic process as the best path forward.

III. WHAT MAKES AN ACTIVIST? HOW ARE THEY VIEWED?

- Setting aside voting, which 70% of Americans say they do “very often,” we looked at 10 different behaviors that might qualify someone as active on issues. Among these activities, Americans are most likely to donate to community organizations and volunteer, share their opinions on issues through email or social networks, and “vote with their wallet” based on a company’s behavior.

PERCENT OF AMERICANS WHO DO EACH ACTIVITY “SOMEWHAT OFTEN”

67%	Donate money to a community organization
65%	Volunteer in your community
63%	Share your opinions with people you know through email or social networks
59%	Make purchases based on a company’s business practices and issue positions
37%	Attend community meetings or town halls
31%	Write or call your elected officials
30%	Share your opinions on issues by publicly posting online, writing to a newspaper, or calling a radio program
29%	Donate money to a political or issue campaigns
20%	Volunteer on political or issue campaigns
17%	Attend political rallies

- About three-in-ten (30%) Americans qualify for **the highest level of issue activity** by participating in at least six of the above actions at least somewhat often. These **Most Active** Americans tend to have high incomes and high education. Whites and African-Americans are equally likely to fall in this category (31% of both races qualify), outpacing the issue activity of Hispanics (22%). Those aged 40-49 are most likely to qualify as **Most Active**, at 41%. Least likely are the youngest Americans (age 18-29), only 18% of whom qualify as most active by doing at least six of these activities.
- Three-in-five Americans (60%) say they participate in at least one of these activities “very often.” This group overwhelmingly (60%) reports that they took it upon themselves to get involved, rather than being asked by someone they know (20%), seeing or hearing an ad (8%), or getting involved through work (8%).
- Overall, Americans reject the “activist” label. Just one-in-four (24%) Americans would use that term regarding their own involvement in community, political, social or economic issues. In fact, less than half (41%) of those who participate in the most issue activities actually consider themselves to be activists. This includes just 30% of frequent volunteers and just over half (58%) of those who say they very often attend political rallies identify with the term “activist.”

- Americans do not see specific groups of activists as particularly helpful to the challenges facing the country today. Just 35% think Social Activists are “mostly helping” while an equal number (34%) say they’re “mostly hurting.” Faring worse are Political Activists (25%-41%) and Celebrity Activists (24%-36%).
- In general, Democrats have more affinity for the term “activist” than Independents and Republicans.
 - 55% of Democrats think Social Activists are helping the country, compared to 36% of Independents and 15% of Republicans.
 - 38% of Democrats think Political Activists are helping, compared to 24% of Independents and 13% of Republicans.
 - 43% of Democrats think Celebrity Activists are helping, compared to 20% of Independents and 8% of Republicans.

IV. AMERICANS THINK THE COUNTRY NEEDS MAJOR CHANGES ON MOST ISSUES

- By a wide margin, Americans continue to believe the country is off on the wrong track. Just 27% say things are headed in the right direction and 62% say wrong track.
- Fully seven-in-ten (70%) Americans believe that the country needs major changes. Another 25% believe the country needs minor changes, and just 3% say things should stay about the same.
- Among the 95% of Americans who think things in the United States should be changed, a plurality (42%) believes that changes should be led by Average Americans. Another 40% are split between preferring that changes be led by State and Local Government (21%) or the Federal Government (19%). Just 7% believe that Companies and Businesses should lead the changes.
- When asked if they are most concerned about issues facing the country, the world, or their local community, Americans are overwhelmingly focused on the country. Nearly three-in-five (58%) are more concerned about the country than about the world (25%) or their neighborhood or local community (15%).
- On what would make the most meaningful impact on issues they care about, a solid majority (53%) believe a change in national policy would do more than a change in the way companies do business (16%), a change in community policies (15%), or a change in international policies (12%).

- On a list of issues facing the country, a majority of Americans see us headed in the right direction on just two – “ensuring equal rights for all Americans” (51% right direction) and “producing more domestic sources of energy” (51%).
 - Americans are split on the issues of “protecting the environment” (48% right direction – 44% wrong track) and “reducing crime and domestic violence” (44%-47%).
 - They are mostly negative on the direction of issues like “growing the economy and creating jobs” (55% wrong track), “protecting individual liberties” (55%), “providing more public spending on education, research, and infrastructure” (54%), “improving access to healthcare and reducing costs” (53%), “improving the quality of K-12 education (53%), and “making it easier to start and run a business” (50%).
 - The worst ratings are reserved for “protecting Americans’ privacy” (72% wrong track), “reducing taxes and government spending” (70%), “reducing poverty” (66%), “keeping a college education affordable” (61%), and “protecting benefits like Social Security and Medicare” (59%).

V. AMERICA’S LEADERSHIP AND INSTITUTIONS SUFFER FROM A SEVERE TRUST DEFICIT

- President Obama’s job approval is under water at 41%, just a few points above his November 2013 score (38%) which was the lowest we’ve measured in the Heartland Series. Congress is suffering through an 11% approval rating. Just one-in-four (25%) Americans believe that the actions being taken by the Obama administration will increase opportunity for people like them to get ahead.
- In a new question in the Heartland Monitor series, Americans were asked if they approve or disapprove of the way the private sector – companies and businesses – are operating in the United States. Americans are split on this matter, with a slight tilt to the negative, as 40% approve and 44% disapprove.
 - The private sector has an approval rating of above 50% only among a select few groups, including those in \$100k+ households, those who identify as “Upper Middle Class,” Republican men, college-educated men, and college-educated African-Americans.
 - There is no difference in the private sector’s approval rating among Whites (40%), African-Americans (41%), or Hispanics (42%).



- Those at the lower end of the economic scale are disillusioned with the private sector. Just 32% of the unemployed and only 26% of those in <\$30k households approve of the way companies and businesses are operating.
- Survey respondents were asked to rate a list of people and institutions on the extent to which they are mostly HELPING or mostly HURTING the major issues and challenges facing the country. **By this measure, Community Groups (66% helping) and Small Business Organizations (64%) are the two groups seen by a majority of Americans to be mostly helping the country.**
 - Scoring somewhat positively, but short of a majority, were Church and Religious Organizations (46% helping – 17% hurting) and Average Americans (39% helping – 17% hurting).
 - Americans have mixed feelings about the contributions of State and Local Government (39%-33%), Social Activists (35%-34%), and Labor Unions (32%-38%).
 - Groups with somewhat mixed - but mostly negative - reviews include Political Activists (25%-41%), and Celebrity Activists (24%-36%).
- Notably, Public-Private Partnerships between Government and Business are seen in a negative light, with just 27% believing them to be helping the country and 40% believing them to be hurting.
- Americans reserve their lowest rating for the federal government and the business and political elite. Those viewed by a majority to be mostly hurting the country include Political Parties (12% helping - 63% hurting), Lobbyists (11%-59%), The Federal Government (21%-58%), Wealthy Political Donors (19%-54%), Corporate CEOs (18%-50%), and Large Corporations (25%-53%).
- Two-in-three Americans (63%) believe the federal government is becoming less responsive to the opinions of average Americans than in previous generations. A plurality (43%) believes that state and local government are becoming less responsive.
- Three-in-five (59%) think that large corporations are operating with less concern for average Americans than in previous generations.
- And, cynically, three-in-five (60%) Americans see a company's sponsorship of a community event, charity, or support for a social cause as "a way for the company to advertise and appear to care about more than making money." Just 29% see this type of sponsorship as "a genuine attempt by the company to give back to the public and drive social change."