

MEMORANDUM

TO: **Allstate**
FROM: **FTI Consulting**
DATE: **08 / 26 / 2015**
RE: **Allstate/National Journal Heartland Monitor Atlanta Metro Supplement Key Findings**

This memorandum outlines key findings from a survey of adults conducted August 19-23, 2015 in the Atlanta metro area, including the counties of Fulton, DeKalb, Gwinnett, Cobb, and Clayton. The survey includes 105 interviews with City of Atlanta residents. This survey investigates area residents' views on the local economy, innovation, and Atlanta's future and is a continuation of similar studies conducted in Austin, Denver, and Detroit. The survey was conducted among a sample of 400 adults age 18+ living in the Atlanta metro area, with 200 reached via cell phone and 200 reached via landline. The margin of error for a sample of 400 is +/- 4.9 in 95 out of 100 cases.

SUMMARY OF FINDINGS

These survey results tell the story of a region with modest optimism about the local economy and growth, but hesitation about the area's innovation.

Atlantans view their economy as good or fair, but not excellent, and they are less positive than residents of the Denver and Austin regions previously sampled. They think the city is headed in the right direction, but they are only slightly positive towards their local elected officials. They feel positively about local growth, but they're split on whether or not the region is prepared to handle it.

Looking to local institutions, most think the ideas and solutions being offered are merely adequate, but not particularly innovative and remarkable. Overwhelmingly, Atlantans are looking for local institutions to try out new ideas and solutions – even if the outcomes may be uncertain – rather than relying on tried and tested solutions that do not yield new thinking.

KEY FINDINGS

1. **Perceptions of the Atlanta area are reasonably positive, and there is significant optimism about the region's growth.**

- Two-thirds (66%) think their local area is headed in the right direction, including 61% of city residents and 68% of those outside the city.
 - This is on par with the national findings from February (66% right direction).
- Half (51%) approve of their local political leaders, with ratings reasonably consistent among Republicans (57%), Democrats (52%), African-Americans (47%), and Whites (52%).
 - Atlantans give their local political leaders a lower approval rating than do their counterparts in Austin (62%), Denver (58%), Detroit (56%), and nationally (60%).
- Atlantans give their economy a middling rating. Four-in-ten (42%) rate their local economy as good and another four-in-ten (41%) say it is fair. The two extremes are



rather low: six percent (6%) rate the economy as excellent and ten percent (10%) say it is doing poorly.

- Compared to other cities we have tested, Atlanta's positive rating of 49% excellent/good sits in the middle of the pack.
 - Austin, TX had a 74% excellent/good rating in July.
 - Denver, CO had a 63% excellent/good rating in February.
 - Detroit, MI had a 40% excellent/good rating in May.
 - Americans nationally rated their local economy slightly lower (42% excellent/good) in February.
- Local economic perceptions differ across the Atlanta region. Residents who live outside of the city limits are more optimistic about their economy (53% excellent/good) than their city resident counterparts (36% excellent/good). Half of city residents (51%) feel the local economy is only performing fairly.
- There is a measurable difference between the economic positivity of Whites (57%) and African-Americans (37%).
- Forty-six percent (46%) of Atlantans believe that their local economy will remain unchanged over the next year, a slightly smaller amount of Atlantans (43%) think it will improve, and 9% think it will become worse.
 - The economic outlook differs by region. Half of city residents (52%) are optimistic about an improving economy compared to just four-in-ten (40%) of those in surrounding areas.
 - Atlanta's one-year economic outlook is slightly less positive (43% think it will improve) than what we measured in Austin and Denver (48% in both cities). However, Atlantans are more optimistic than those in Detroit (40%) and Americans across the nation (35%).
- Looking ten years into the future, six-in-ten (61%) say the Atlanta economy will have improved by that point, while 21% believe it will be about the same, and 13% say it will become worse.
 - City residents again are very optimistic. Nearly three-in-four (71%) think the economy will improve over the next ten years. Only 58% of non-city residents share the same optimism.
 - African-Americans (73%) express much more optimism than Whites (52%).
- Transportation (22%), healthcare (20%), and film/television (19%) are considered the most important industries for Atlanta's economic future.



2. Atlantans have positive feelings about the impact that a growing population will have on their local area. However, they have mixed feelings on whether the area is prepared to handle this growth.

- In response to the information that the Atlanta metropolitan area is among the fastest growing cities in the nation in terms of population growth, residents are enthusiastic about the impact with 62% viewing the growth as a positive thing and 32% seeing it in a negative light.
 - More than seven-in-ten (73%) Atlanta city residents agree that the population growth will have a positive impact. Non-city residents are a bit more cautious in their optimism (58% overall positive).
 - Younger men (74%) and younger women (64%) are more hopeful about this growth than their older counterparts (58% and 47%, respectively).
 - African-Americans (63%) and Whites (62%) are nearly identical in their positive views of regional growth.
- When Atlantans are asked if the city can handle the challenges and opportunities posed by this growth, they return a split decision (50% prepared, 48% unprepared).
 - Both city and non-city residents are divided on this matter. Residents of Cobb County lean towards unprepared (56%), while Fulton (53%), DeKalb (52%), and Gwinnett (52%) residents take the optimistic viewpoint.
 - African-Americans (55%) are more likely to think the region is prepared for the growth than are Whites (46%).
- Nearly four-in-ten (37%) Atlantans think that affordability and low cost of living is the number one reason that their city is a desirable place to live. The draw of national and global companies (22%), cultural and entertainment options (16%), and top colleges and universities (14%) are secondary reasons.
- Atlantans think the film and television industry (36%) is what makes their region unique, followed by the related media and communications industry (18%).
- Traffic and other issues related to growth are considered the biggest challenges facing the local area (38%).

3. Atlantas feel that their area produces run-of-the-mill ideas and solutions. While they recognize that innovation may be held back by local challenges, they crave new and forward-thinking ideas.

- A plurality of Atlantans (40%) say that local institutions are offering “adequate but unremarkable” ideas and solutions while 30% say the ideas are “old and outdated.”
- Fewer than two-in-ten (18%) metro area residents say that the offerings are “new and forward-thinking.”



- This “forward-thinking” score is lower than we have seen across the nation (28%) and in other metro areas – Austin (34%), Denver (29%), and Detroit (21%).
- More than half (53%) feel Atlanta is “just as innovative or more innovative than other cities, but held back by local challenges.” Twenty-three percent (23%) feel that Atlanta is less innovative than other cities.
- Fewer than two-in-ten (18%) believe Atlanta is more innovative than other cities.
 - This is higher than the 10% of Detroiters who felt the same about their local area, but lags behind the strong perception of innovation reported by Austinites (30%).
- When asked where more progress is being made, 41% say their state and local level and 35% say the national level.
 - This recognition of state and local progress is lower than we saw in Austin (44%), Detroit (49%), Denver (63%) and nationally (64%).
 - Strikingly, opinions on this matter are mirror images by race. More than half (51%) of African-Americans believe that more progress is being made at the national level, with 32% citing the state or local level. Among Whites, 45% point to state and local progress and just 22% cite national progress.
- Three-quarters (75%) would prefer “trying new ideas and solutions, even if the outcomes may be uncertain” rather than “relying on tried and tested ideas and solutions, even if it means a lack of new thinking (17%).”

4. Jimmy Carter, Tyler Perry, Andrew Young, and Ted Turner are named as the most prominent living Atlanta success stories, followed by an array of politicians, musicians, businessmen, and athletes.

- On an open-ended question in which survey respondents could name whoever they thought of as the best example of a notable Atlantan, former U.S. President Jimmy Carter (named by 14% of respondents) received the most mentions followed closely by actor, director, and producer Tyler Perry (13%), former Mayor Andrew Young (12%), and media mogul and philanthropist Ted Turner (10%).
- The top two personalities mentioned by African-Americans were Young (21%) and Perry (16%). Whites cited Carter (19%) and Turner (17%).
- Other politicians recalled by numerous respondents were current Mayor Kasim Reed (7%), and Congressman John Lewis (5%).
- Businessmen mentioned were Arthur Blank (7%), Bernard Marcus (1%) and S. Truett Cathy (1%).
- Musicians came from all genres: Ludacris (3%), T.I. (3%), Andre 3000 (2%), Usher (2%), Young Thug (1%), Future (1%), Janelle Monae (1%), and Zac Brown (1%).



- Baseball players Hank Aaron (5%) and John Smoltz (1%) were among the list of athletes that also included baseball player Dominique Wilkins (1%) and boxer Evander Holyfield (1%).
- Though respondents were asked to name living personalities, many still mentioned Martin Luther King, Jr. (7%) and the recently deceased Julian Bond (1%).

5. Asked to name a prominent company that is particularly good for Atlanta, its communities, and its people, Coca-Cola received the most mentions by far, followed by several other large Atlanta-based businesses.

- Coca-Cola (named by 44% of respondents) led all other companies, followed by The Home Depot (19%), Delta Airlines (15%), TBS/CNN (11% combined), and UPS (6%).
- Others receiving significant mentions were AT&T (4%), Chick-fil-A (4%), Walmart (2%), Porsche (2%), Georgia Power (2%), and Bank of America (2%).