



August 2017 NBC-WSJ Social Trends Poll

Selected Key Trends



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The Way We Live/ Social Policy

Religion

- Since 1999, we have seen the percentage of Americans who “never” attend religious services rise 11 points from 13% to 24% today.

Employment Status

- The changes we observed in the American workforce occurred between 1992 and 2002: The percentage of those employed in the “Professional/Manager” category trended up during that decade (from 21% to 25% of the country), while those in both White Collar occupations (27% in 1992, 21% in 2002) and Blue Collar jobs (23% in 1992, 17% in 2002) trended downward. The percentage of those working in these three categories, Professional/Manager, White Collar, and Blue Collar is largely stable from 2002 through today.
- One trend is becoming clearer though as those self-described as “retired” has moved up from 17% in 1992, to 20% in 2002 to 25% in the January 2017 survey.

Type of Work of Respondents – Trend

Type of Work	January 1992	January 2002	January 2007	January 2012	January 2017
Professional/Manager	21%	26%	22%	24%	25%
White Collar	27%	21%	19%	17%	19%
Blue Collar	23%	17%	16%	15%	19%
Retired	17%	20%	26%	25%	25%

<p>Professional/Manager (Selected Examples): Doctors, attorneys, CEOs, CPAs, all analysts, engineers, pilots, ministers/ priests/ reverends/ rabbis, dentists, pharmacists, brokers, Presidents/VP of companies, architects, teachers/ professors, and consultants.</p>	<p>White Collar (Selected Examples): Any business owners, self employed, marketing, sales, restaurant owners, jewelers, insurance, route sales, purchasing, import/ export, telemarketing, real estate, retail sales, wholesaler, manufacturing rep, sales rep, basically any desk-type job, and computer work.</p>	<p>Blue Collar (Selected Examples): Construction, bakers, gardeners, electricians, painters, movers, police/ fire/ EMS, investigators/ detective, cooks, bartenders, wait staff, sheriff, dispatcher, manufacturing jobs/ assembly/ factory, and plumbers.</p>
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Retirement

- Expectations about retirement age have changed since 1999. Among those who are not already retired or a stay at home parent, in 1999, 23% expected to retire when they were younger than 60 years old. Today, that has dropped a full ten points down to only 13%. The percentage of respondents who say they will retire at 70 or older has climbed from 18% in 1999 to 28% today.

Retirement Age

At what age do you expect to retire?

	March 1999	August 2017
Under 60	23%	13%
61-64	15%	8%
65	24%	22%
66-69	5%	8%
70+	9%	17%
Never	9%	11%

Top Movers That Expect to Retire When They're 70 or Older

	1999	2017	Net Diff.
Total	9%	17%	+8%
Liberals	9%	20%	+11%
Rural Residents	5%	16%	+11%
Democrats	10%	21%	+11%

Household Composition

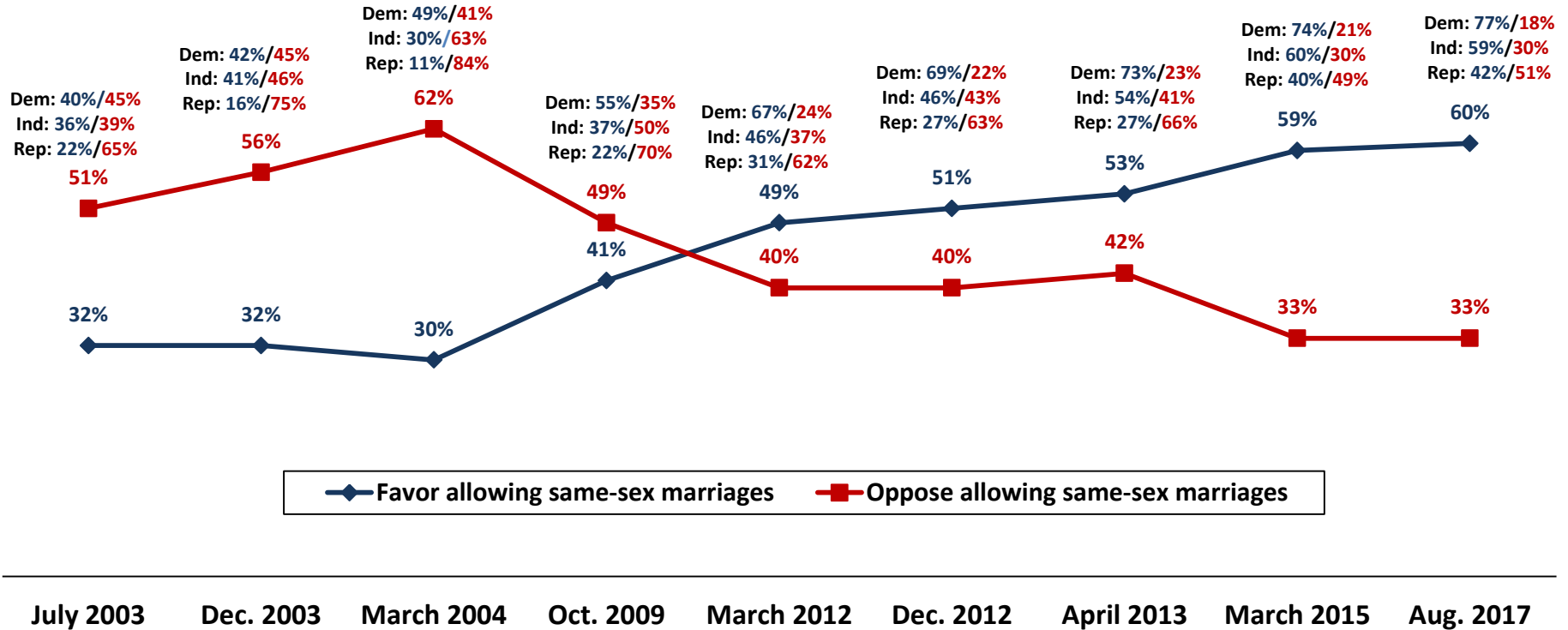
- We are witnessing a shift in self-described household composition. In 2009, 13% of respondents said “a child over the age of twenty-one or another family member or relative is living in your household for financial or health reasons.” By 2014, this had climbed nine points to 22% and today’s data is stable at 21%.

Same-Sex Marriage

- The percentage of Americans who favor allowing same-sex marriage has doubled from 30% to 60% over the past 13 years.

Attitudes Toward Same-Sex Marriage – Trend

Do you favor or oppose allowing gay and lesbian couples to enter into same-sex marriages?



Gun Issue

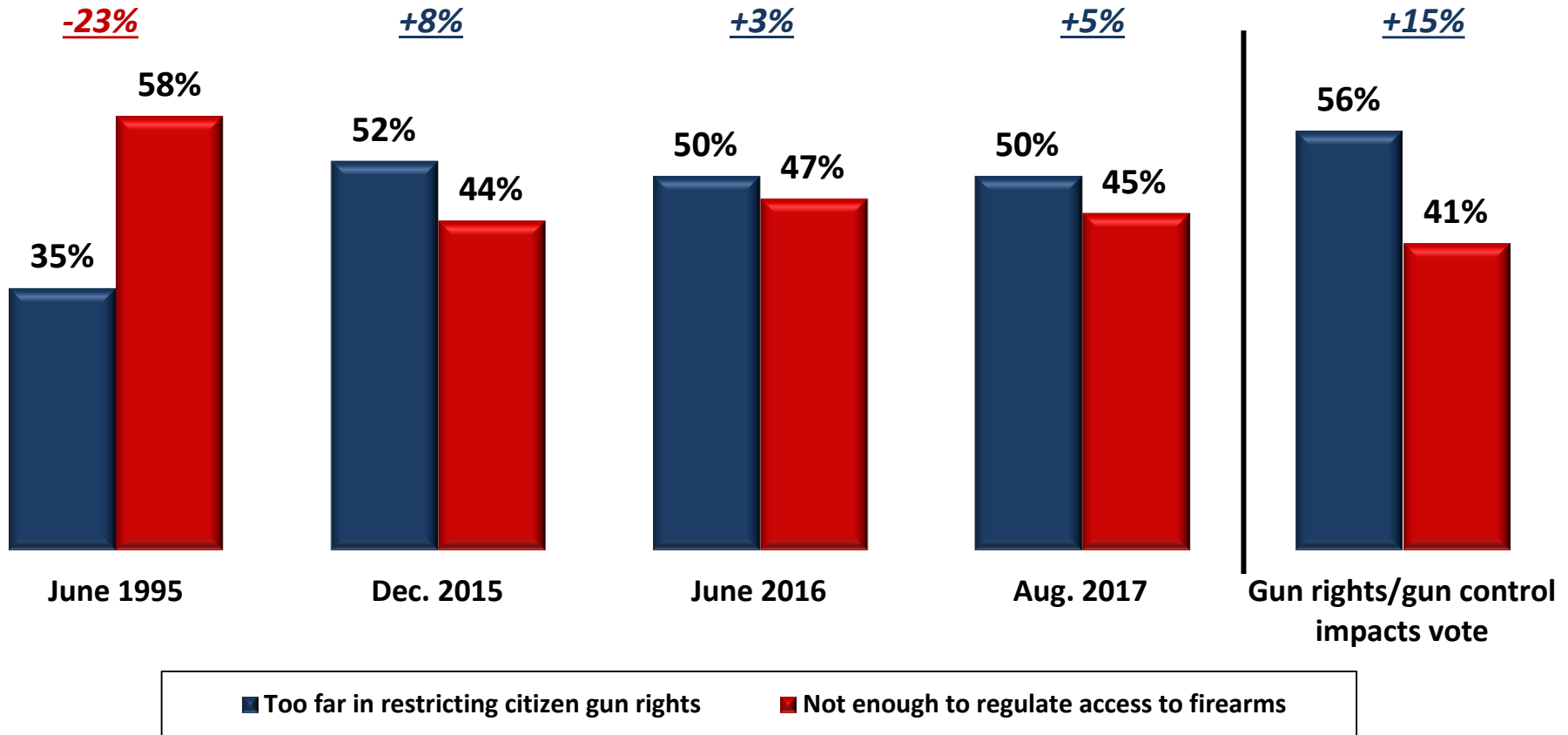
- In 1995, just 35% of Americans were concerned the government would go too far in putting restrictions on gun rights while 58% were worried the government would not do enough to regulate access to firearms. In the latest survey, with a record high (48%) of Americans saying they have a gun in their home, half (50%) of Americans are more concerned about government restrictions and 45% worry the government will not do enough to regulate access to firearms.

Attitudes Towards Gun Rights – Trend

Which of the following statements concerns you more...

Statement A: *The government will go too far in restricting the rights of citizens to own guns*

Statement B: *The government will not do enough to regulate access to firearms*

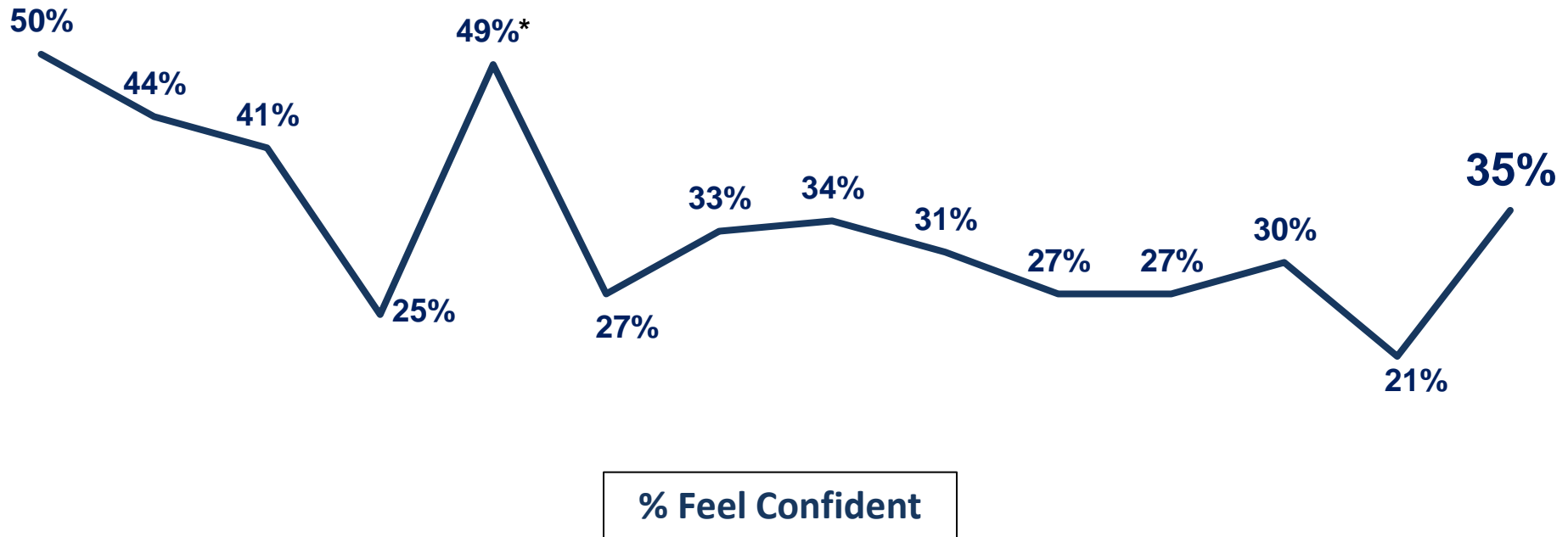


Confidence in Future Generation

- The last time a majority (50%) of Americans said they were confident that life for their children's generation will be better than it has been for themselves was in 1990. The 35% of Americans holding this view today is the most optimistic we have measured on this topic in over a decade.

Confidence in Children's Generation – Trend

Do you feel confident or not confident that life for our children's generation will be better than it has been for us?



Oct '90 Dec '91 Dec '92 Sep '93 Dec '01 July '06 Jan '07 Sep '08 June '09 Dec '09 Aug '10 May '10 Aug '14 Aug '17

*First measurement post 9/11 when there was a surge of positive sentiment on a number of different questions.

Economic Changes

Economic Status

- For whatever else has changed, this snapshot of America by self-described economic circumstances is identical to the America of 19 years ago.
- But, if you look at the percent of Poor/Working Class (PWC) Americans in Urban, Suburban and Rural geography, there's an 11 point spike in Rural areas (41% PWC in '98 and 52% today), but really no change in Urban (35% in '98 and 36% today) or Suburban (32% in '98 and 30% today) areas.

“Self-described” Economic Circumstances – Trend

	1998	August 2017
Poor	6%	8%
Working Class	30%	28%
Middle Class	44%	44%
Upper Middle	16%	16%
Well To Do	2%	3%

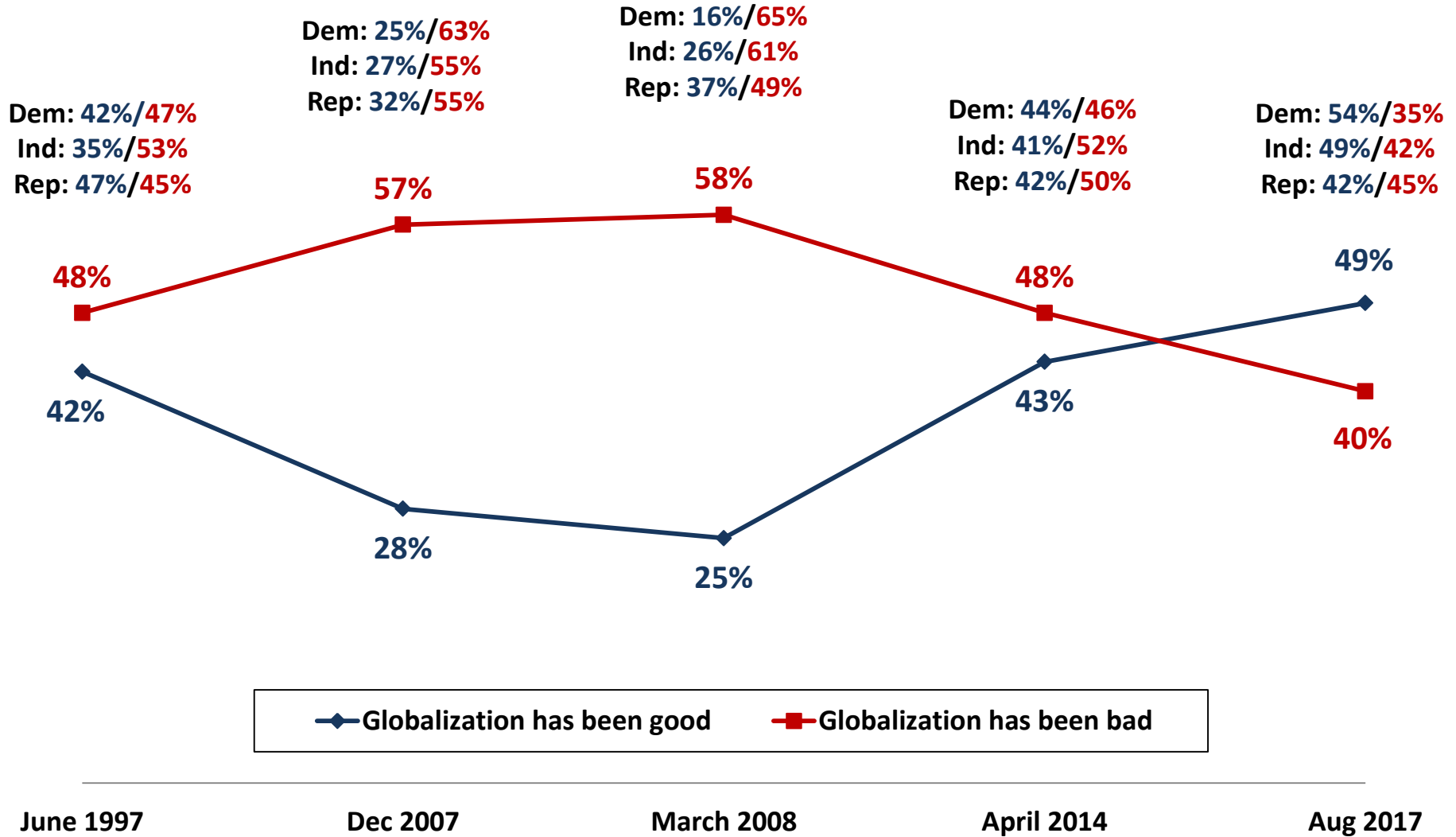
“Self-described” Economic Circumstances – Trend

	Poor/Working		Middle		Upper/Well To Do	
	1998	2017	1998	2017	1998	2017
Total	36%	36%	44%	44%	18%	19%
18-49	38%	39%	43%	41%	19%	19%
50-64	32%	33%	43%	43%	23%	22%
65+	34%	27%	50%	56%	13%	15%
Whites	34%	33%	45%	45%	20%	20%
African Americans	46%	44%	37%	44%	14%	11%
Northeast	35%	35%	44%	43%	17%	20%
Midwest	35%	41%	47%	45%	16%	15%
South	34%	32%	42%	46%	22%	20%
West	38%	38%	41%	41%	19%	19%
Urban	35%	36%	42%	45%	20%	17%
Suburban	32%	30%	44%	46%	21%	23%
Rural	41%	52%	44%	37%	13%	8%
Republicans	26%	32%	46%	44%	27%	22%
Independents	42%	35%	42%	45%	14%	18%
Democrats	40%	36%	44%	46%	15%	17%

Globalization

- During the beginning of the Great Recession years (2007-2009), majorities said globalization has been bad for the U.S. Today, more Americans feel positively than negatively toward globalization. This is the first time, since first asked twenty years ago, that there has been a net positive on this question.

Thoughts on Increasing Globalization – Trend



Immigration

- Today, 64% of Americans agree immigration adds to our character and strengthens the United States while 28% say it detracts from our character and weakens the United States. Over the past twelve years the percentage of Americans who believe immigration strengthens the U.S. has increased 23 points from 41% in 2005 to 64% in 2017.

Immigration Strengthens/Weakens the U.S. – Trend

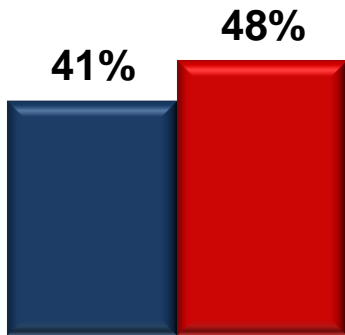
Which statement comes closer to your view...

Immigration adds to our character and **strengthens** the United States because it brings diversity, new workers, and new creative talent to this country.

Immigration detracts from our character and **weakens** the United States because it puts too many burdens on government services, causes language barriers, and creates housing problems.

GOP	37%	49%
IND	42%	49%
DEM	45%	44%

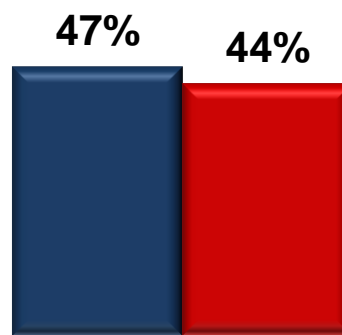
-7%



April 2005

GOP	34%	56%
IND	40%	50%
DEM	60%	33%

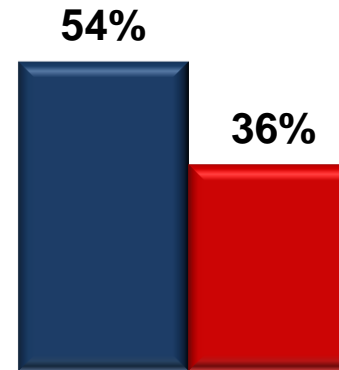
+3%



May 2010

GOP	37%	52%
IND	53%	35%
DEM	68%	26%

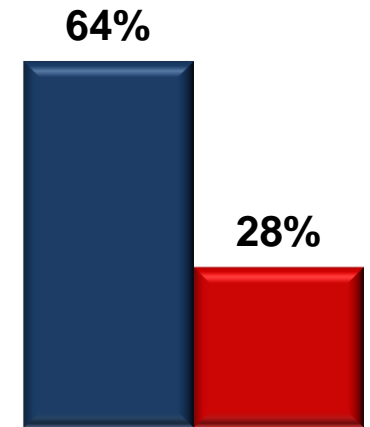
+18%



April 2013

GOP	44%	43%
IND	65%	25%
DEM	81%	16%

+36%



August 2017

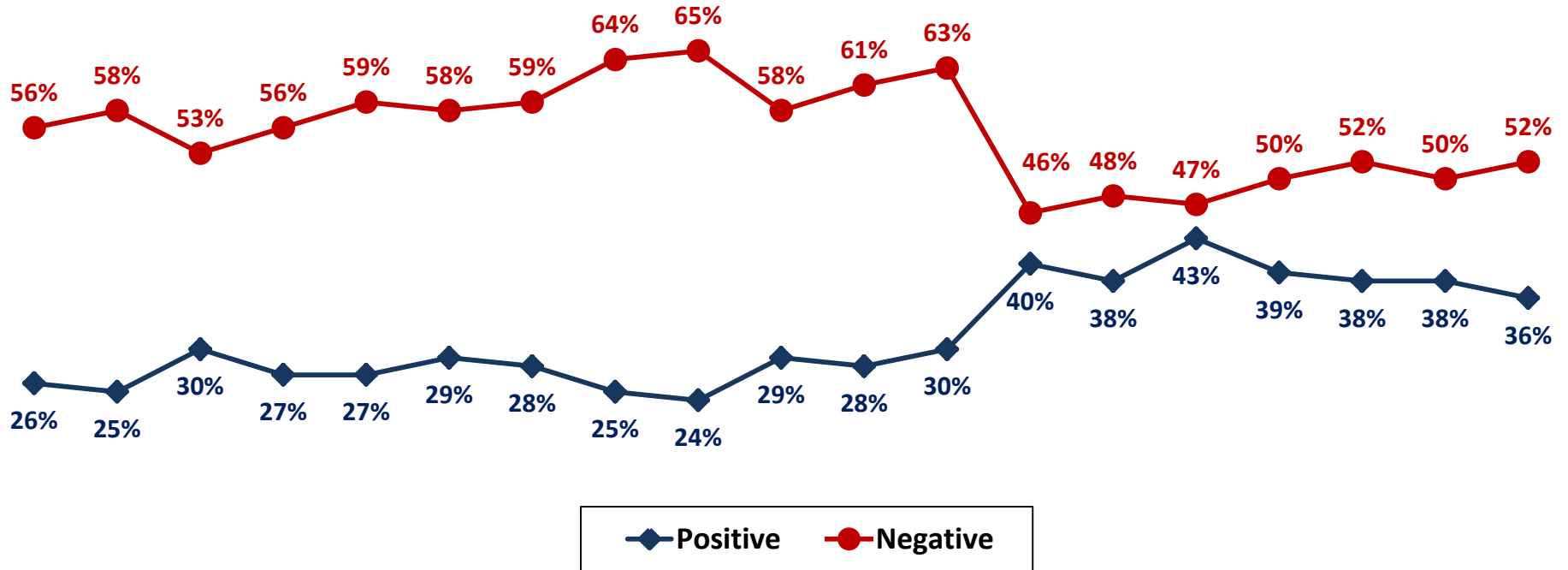
■ Immigration strengthens the U.S. ■ Immigration weakens the U.S.

Public Figures

Trump

- On 28 separate tracks over 27 years, Donald Trump has never had a net positive image rating in a single NBC-WSJ survey. When NBC-WSJ first measured Donald Trump's image rating in July 1990 he had a 14% positive-49% negative rating, or -35%. Nine years later in 1999, he had a net -41% image rating. Just after announcing his candidacy in 2015 he had a net -30% image rating, and just before he won the 2016 election he had a net -33% image rating.
- Today he is at 36% positive-52% negative, or a -16%. His all-time best image rating of 43% positive - 47% negative was recorded just before his inauguration.

Feelings Towards Trump From 2015 to Today

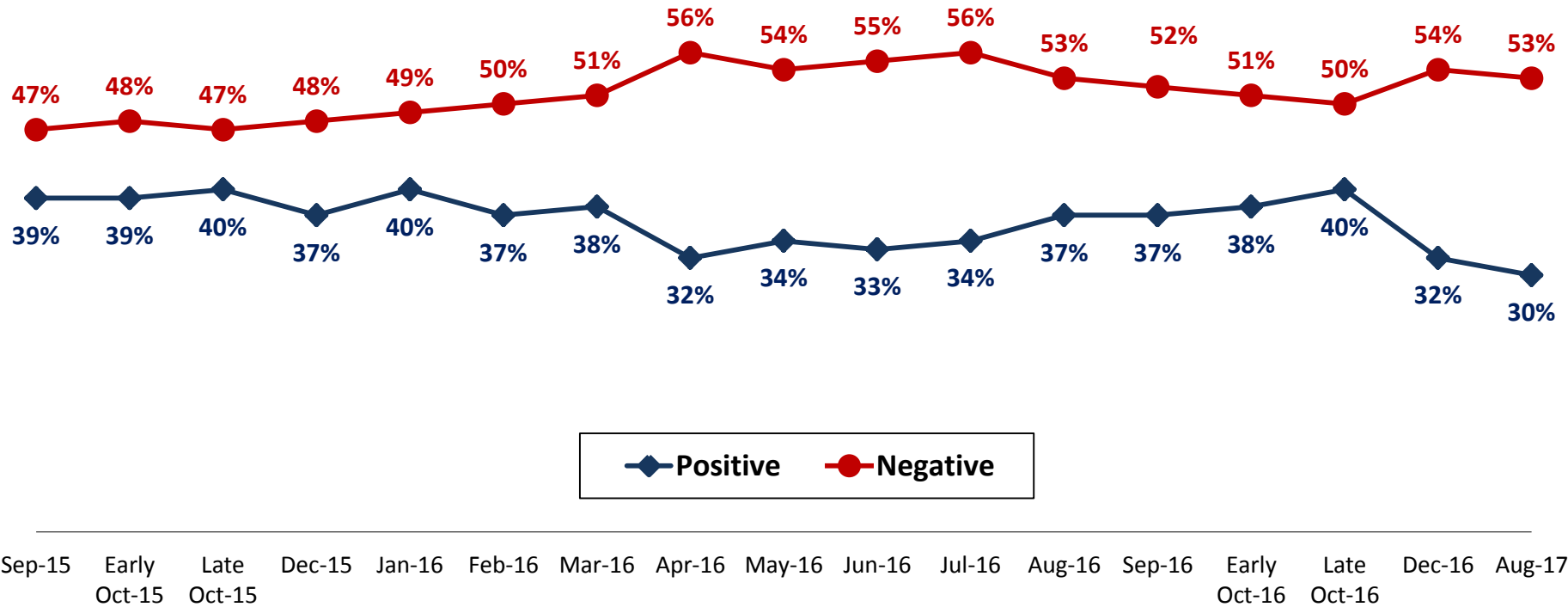


Jul-15 Sep-15 Early Oct-15 Late Oct-15 Dec-15 Jan-16 Feb-16 Mar-16 Apr-16 May-16 16-Sep Oct-16 Dec-16 Jan-17 Feb-17 Apr-17 May-17 Jun-17 Aug-17

Clinton

- Hillary Clinton was first asked on the NBC-WSJ feeling thermometer in April 1992. Across 130 tracks of her image over 25 years she has had a net positive image on 70% of them with a high of 59% positive in February 2009 and a low of 56% negative in July 2016.
- Hillary Clinton has had a net negative image rating in each track since July 2015. The 30% of Americans who have a positive image of her today is a record low across all the tracks since January 1993.

Feelings Towards Clinton From 2015 to Today



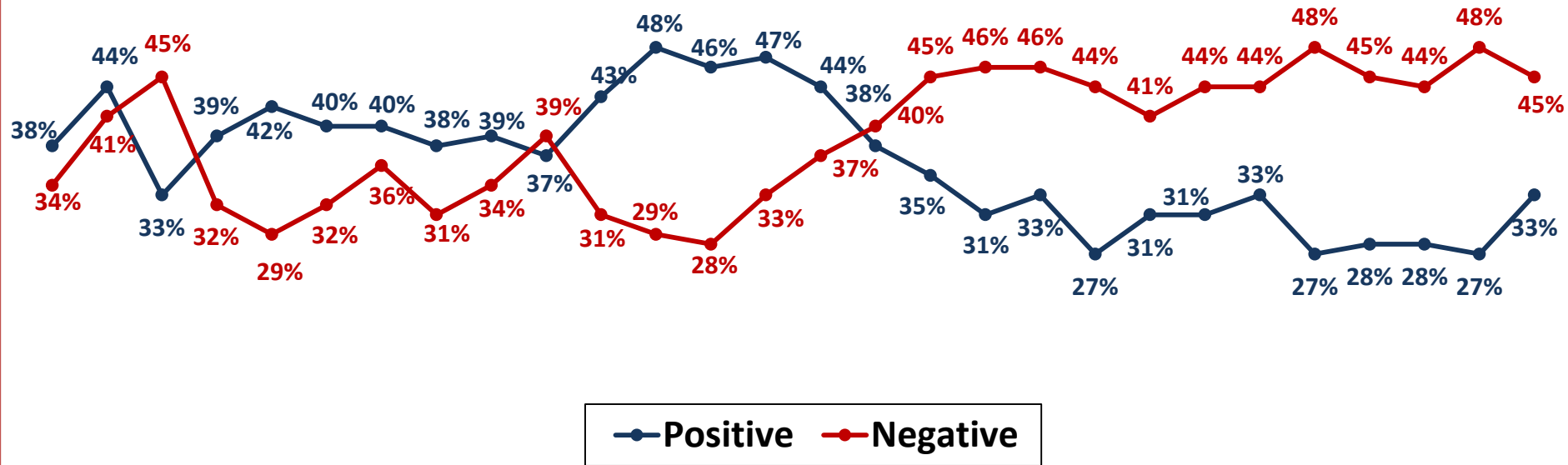
Political Parties

Republican Party

- Prior to February 2005, the GOP had a net negative rating in only 10 of 65 tracks stretching back 15 years to 1990. Most of the 10 tracks where the GOP had a net negative rating were clustered around the elections of 1992 and 1998.
- The Republican party has not had a net positive image rating in any NBC-WSJ track since February 2005 – just after George W. Bush won re-election and just before the Terri Schiavo court case and the U.S. Congress passing legislation regarding this case in March 2005.
- The Republican party's slight net negative (40% positive/41% negative) in the summer 2005 slipped to a larger net negative of -11 points (32% positive/43% negative) in the fall of that year following Hurricane Katrina. The Republican party has had a net negative image ever since except for one track in December 2010 when 38% of Americans held a positive opinion and 37% held a negative opinion of the GOP.

Feelings Towards the Republican Party – Trend

Yearly Average Rating

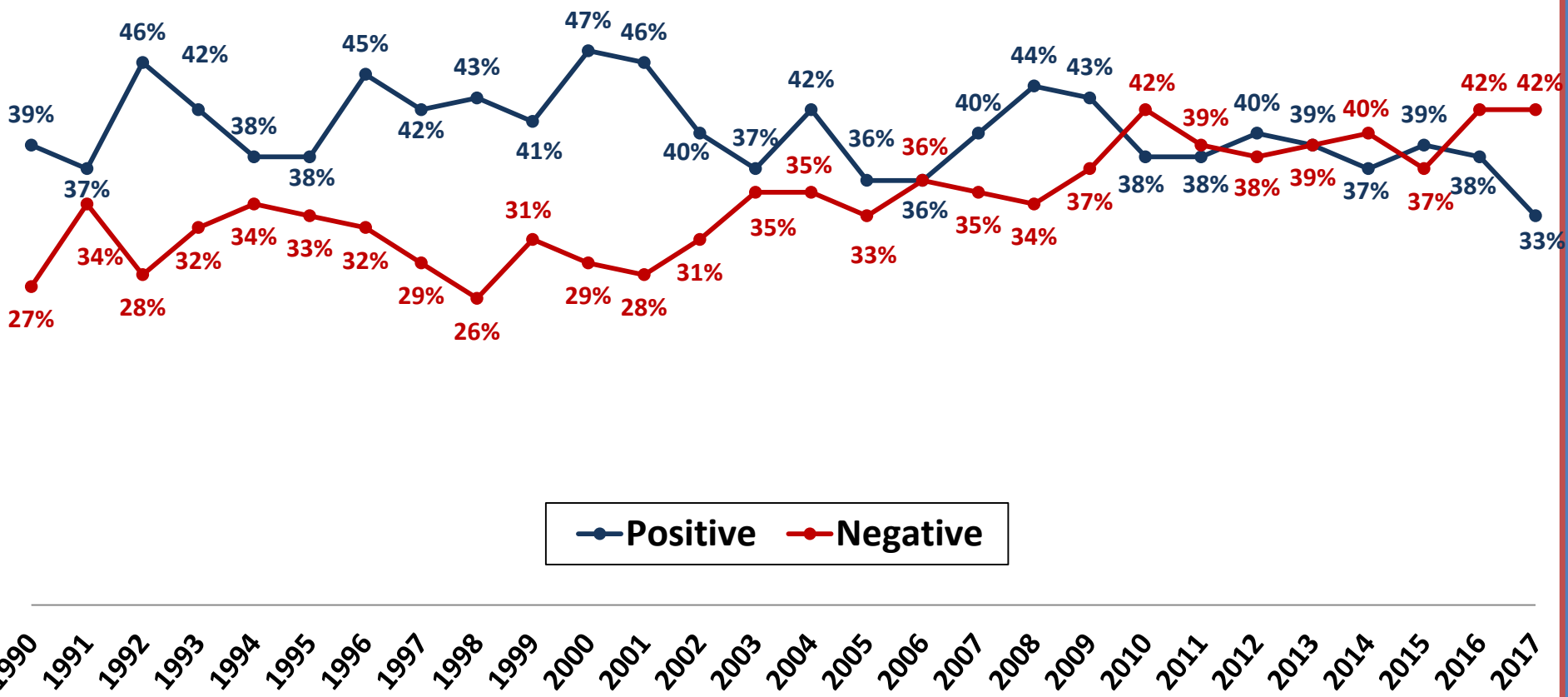


Democratic Party

- NBC-WSJ has taken 173 measures of the Democratic party's image since 1990. Between 1990 and September 2013, the Democratic party only had a net negative rating 30 times, or 17% of the time. The Democratic party has had a net negative rating in 25 of the 30 surveys since October 2013, when the government was shutdown.

Feelings Towards the Democratic Party – Trend

Yearly Average Rating



● Positive ● Negative

Party Identification and Ideology

Party Identification

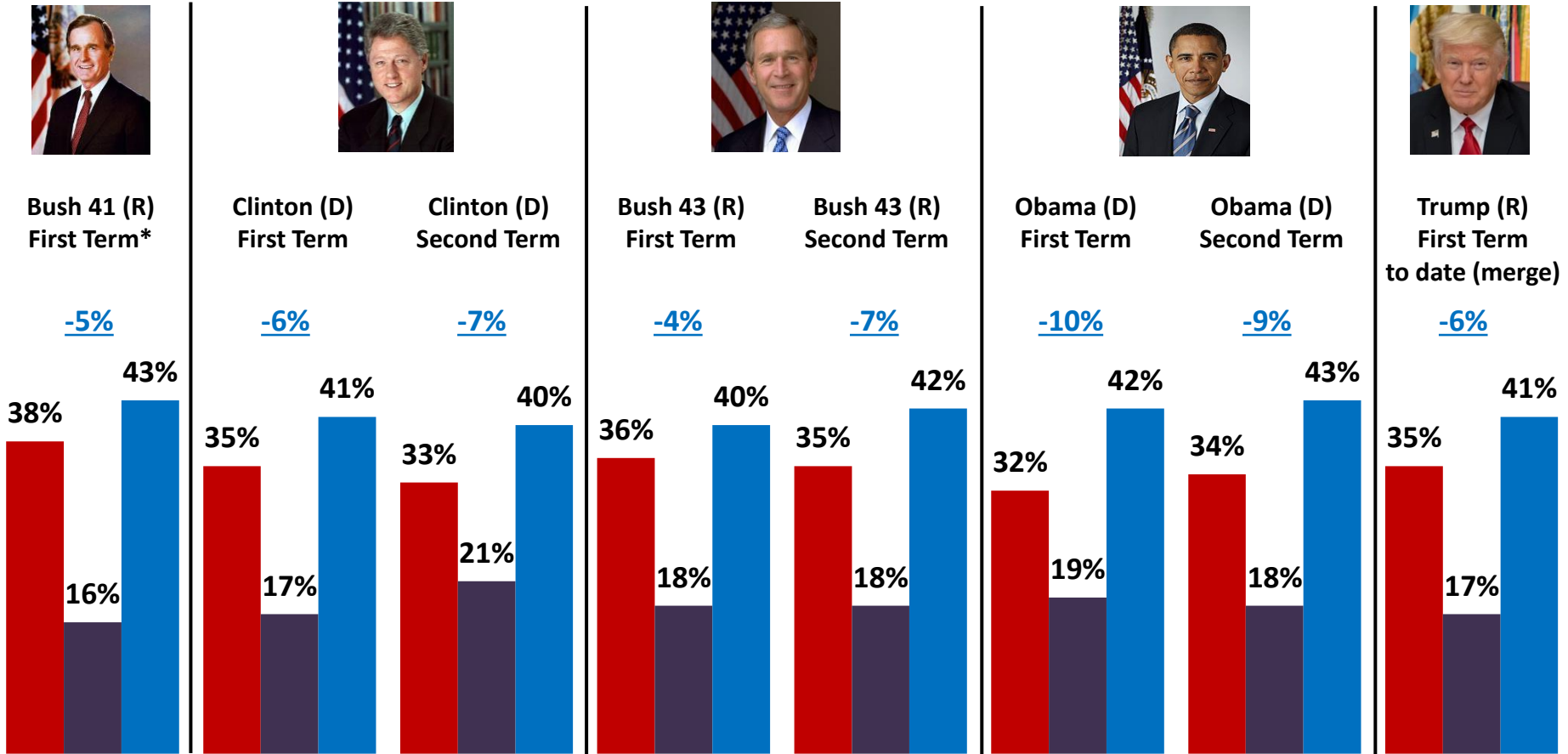
- Since 1990, while it is true a stable trend is that Democrats have held an edge on party identification (ID) with leaners in almost every year, party ID is a volatile measure that does change over time. Looking at a snapshot in time, party ID in January of each year since 1990, one sees distinct trends. Democrats held their strongest advantages in the January following an election of a Democratic president (47% Democrat/30% Republican, +17% in 1993 after Clinton's election and +13% in both January of 2009 and 2013 after Obama's electoral victories).

Party Identification

- Republican net high water marks presaged the “Gingrich revolution” that would occur later that November as in January of 1994 (38% Democrat/36% Republican, the Democratic advantage had shrunk down to only +2% Democrat), while in January of 1995, Republicans would enjoy their only advantage to start a new year (36% Democrat/38% Republican, +2% Republican). Stronger Republican years also include the Bush re-election (January of 2004, a Democratic advantage of only +1%) and the aftermath of his election in January of 2005 (when party ID was tied).

Party ID in January NBC-WSJ Surveys – Trend

Republicans - Democrats



■ Republicans
 ■ Independents
 ■ Democrats

*1990-1992

Party Identification

- Starting in 2010, we began to merge the interviews from every survey. This data set allows for large scale comparisons of sub-groups over time. Comparing this year back to 2010, there has been a shift in the composition of the parties. Since 2010, the following sub-groups moved from a net Democratic advantage to a net Republican edge: ages 50-64, ages 65+, Whites Northeast region, high school or less, men less than college, and income \$50-\$75K. Conversely, the following sub-groups moved from a net Republican to a net Democratic advantage: college graduates, men college plus, Whites college plus, and income more than \$75K.
- The fundamental differences that are reshaping the parties by education, age, and income level are clear.



Key Changes in Net Party ID 2010-2017 – Merge Data

<u>More Republican</u>	<u>Sub-Group Type</u>	<u>More Democratic</u>
<div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Ages 50-64</div> <div style="border: 1px solid black; padding: 2px;">Ages 65+</div>	Age	
Men Ages 50+ Women Ages 50+	Gender/Age	Women Ages 18-49
<div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Whites Northeast</div> <div style="border: 1px solid black; padding: 2px;">South</div>	Geography	West
Small Town/Rural	Type of Community	Suburban Women
Moderates Conservatives	Ideology	
<div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">High School or Less</div> <div style="border: 1px solid black; padding: 2px;">Men Less Than College</div>	Education	<div style="border: 1px solid black; border-radius: 50%; padding: 2px; margin-bottom: 2px;">College Grads</div> <div style="border: 1px solid black; border-radius: 50%; padding: 2px; margin-bottom: 2px;">Post Grads</div> <div style="border: 1px solid black; border-radius: 50%; padding: 2px; margin-bottom: 2px;">Men College +</div> <div style="border: 1px solid black; border-radius: 50%; padding: 2px;">Women College +</div>
Whites Non-College	White/Education	<div style="border: 1px solid black; border-radius: 50%; padding: 2px;">Whites College +</div>
<div style="border: 1px solid black; padding: 2px;">\$50-\$75K</div>	Income	<div style="border: 1px solid black; border-radius: 50%; padding: 2px; margin-bottom: 2px;">\$30-\$50K</div> <div style="border: 1px solid black; border-radius: 50%; padding: 2px;">More Than \$75K</div>

☐ = shifted from net Democratic to net Republican

◯ = shifted from net Republican to net Democratic

Independents

- On average over the Obama years, fewer Americans identified with either party and more said they were Independent than in the other four administrations of the NBC-WSJ surveys (Bush 41, Clinton, Bush 43, Trump).

Independents

	Presidential Administration				
	Bush 41*	Clinton**	Bush 43**	Obama**	Trump ⁺
% Adults identifying as either GOP or DEM	64%	55%	55%	51%	57%
% Adults identifying as IND (including leaners)	33%	38%	39%	42%	35%

Note*: Data for George H.W. Bush from 1990-1992 January surveys

Note**: Data for Bill Clinton, George W. Bush, and Barack Obama reflect the average party identification from the January survey across the span of their entire presidential administration

Note⁺: Data for Donald Trump from the 2017 merge

Political Ideology

- Over a generation, a particularly stable measure has been self-described ideology.* Those who say they are “conservative” has only ranged from 33% to 36% during different presidential administrations. Those who describe themselves as “liberal” has dropped as low as 21% (Bush '43 first administration) or 23% (Bush 43 second administration), but has generally been 24% to 25% of Americans.
- During the second Obama administration and a merge so far of 2017 interviews, the percentage of those describing themselves as “liberal” has moved to a high water mark of 26%, even as “conservatives” continue to enjoy a net ten point advantage.

* We looked at self-described ideology in January of each year from 1990 through 2017.

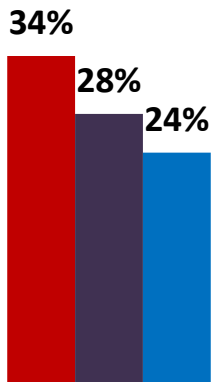
Ideology in January NBC-WSJ Surveys – Trend

Conservatives - Liberals



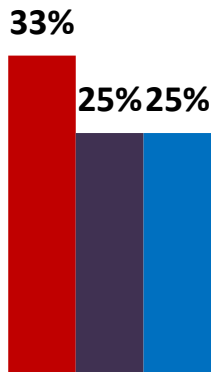
Bush 41 (R)
First Term*

+10%



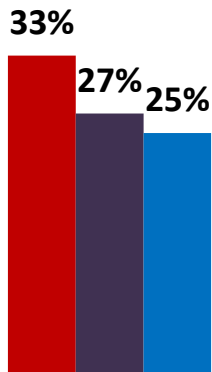
Clinton (D)
First Term

+8%



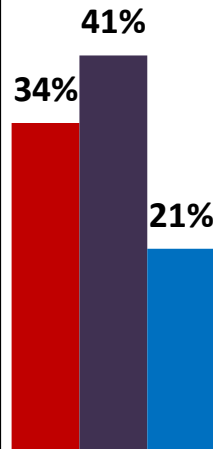
Clinton (D)
Second Term

+8%



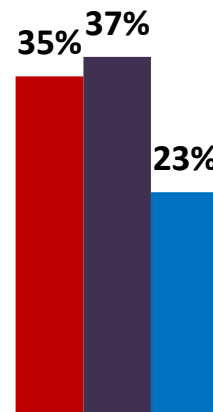
Bush 43 (R)
First Term

+13%



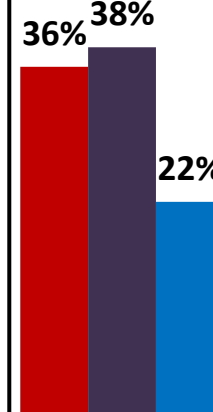
Bush 43 (R)
Second Term

+12%



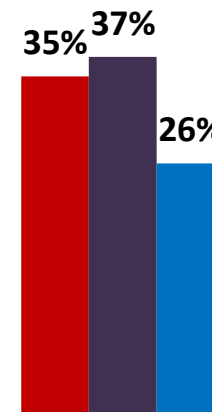
Obama (D)
First Term

+14%



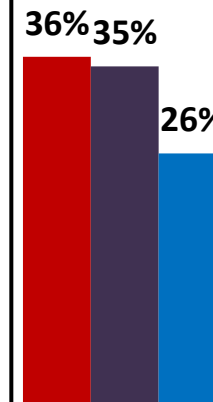
Obama (D)
Second Term

+9%



Trump (R)
First Term
to date (merge)

+10%



■ Conservatives ■ Moderates ■ Liberals

*1990-1992

Political Polarization

- Political scientists describe “polarization” as the difference in the job approval rating between respondents of the president’s party versus respondents of the opposite party. President Reagan was noteworthy for being the most polarizing president in modern polling history. President Reagan’s status was then eclipsed by President Clinton. As the Clinton era included only the second attempt to impeach a president, it may not have been surprising his was the most polarizing presidency. What may have been less expected is that each successive presidency after President Clinton then became the most polarizing in polling history. What is remarkable is this trend is observable even after only the first eight months in office! President Trump’s historically low ratings among Democrats is an important finding, but needs to be understood as the logical conclusion of a generational trend.

Political Polarization

- This puts even more premium on carefully monitoring President Trump's ratings among Republicans and Independents to be better able to calibrate his job approval rating in broader context with the last four administrations.
- The impact though of this extreme polarization now goes deep into the balance of the data. Right direction/wrong track, economic ratings, and other data have always varied based on the president's party versus the opposite party, but these gaps today are so large as to almost make meaningless the ability to trend and understand the findings from many of these questions. The enormous difference between Republicans and Democrats on economic trend questions is not only being witnessed in the NBCWSJ data. The Michigan Consumer Sentiment Index has been conducted going back to the 1950s and they too report the largest gap ever in their history between the two political parties about economic expectations.

Historical Presidential Job Approval by Party at About 8 Months into Presidency

President	President's Party	Opposite Party	Net Difference
Dwight Eisenhower (R)	90%	60%	-30%
John Kennedy (D)	88%	59%	-29%
Richard Nixon (R)	80%	52%	-28%
Jimmy Carter (D)	70%	46%	-24%
Ronald Reagan (R)	85%	42%	-43%
George H.W. Bush (R)	83%	59%	-24%
Bill Clinton (D)	70%	20%	-50%
George W. Bush (R)	87%	21%	-66%
Barack Obama (D)	86%	16%	-70%
Donald Trump (R)	80%	8%	-72%

*Pre-Clinton data from Gallup

Historical Presidential Job Approval by Party at About 8 Months into Presidency

President's Party – Opposite Party



Eisenhower
(R)



-30%



Kennedy
(D)



-29%



Nixon
(R)



-28%



Carter
(D)



-24%



Reagan
(R)



-43%



Bush 41
(R)



-24%



Clinton
(D)



-50%



Bush 43
(R)



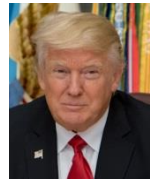
-66%



Obama
(D)



-70%



Trump
(R)



-72%

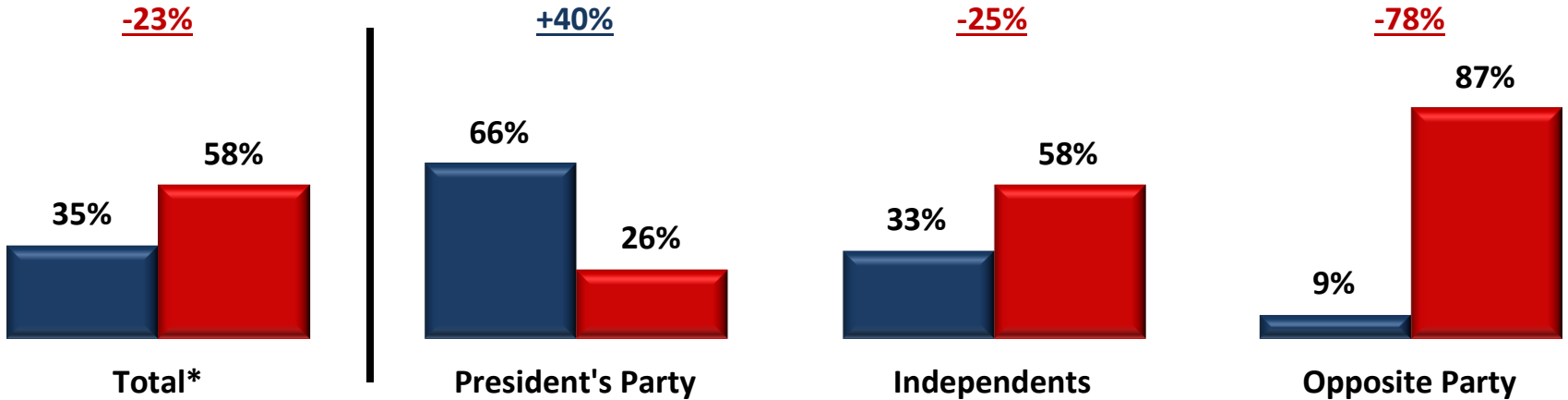
*Pre-Clinton data from Gallup

Presidential Job Approval at Lowest Point: Putting Numbers Among Trump's Base in Perspective

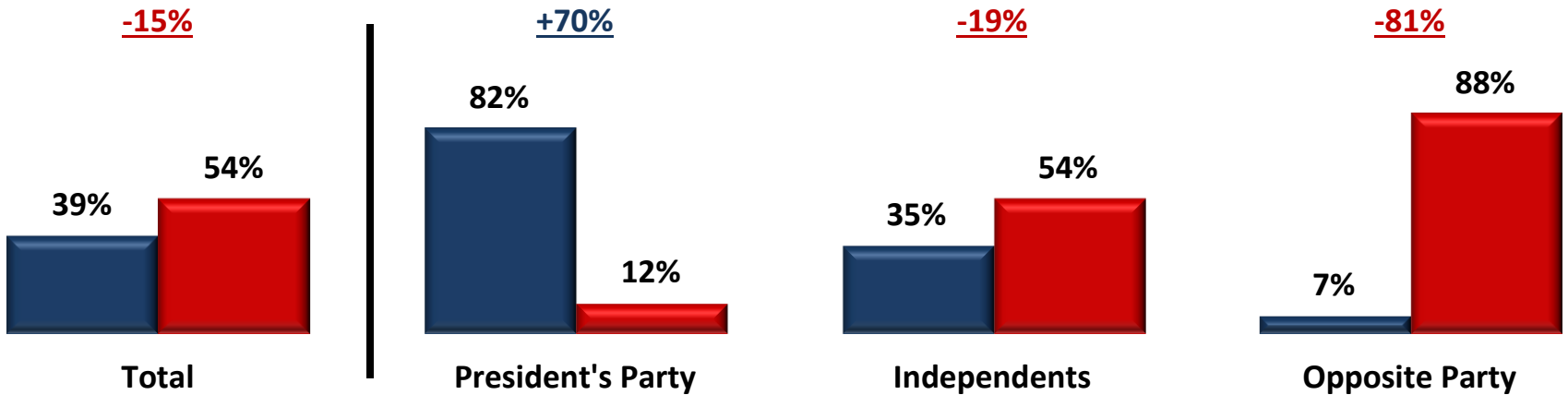
President and Date	Total % Approve	President's Party % Approve	Independents % Approve	Opposite Party % Approve	Net Difference (President's Party – Opposite Party)
George H.W. Bush (R) October 1992	32%	65%	32%	10%	+55%
Bill Clinton (D) June 1993	41%	65%	39%	14%	+51%
George W. Bush (R) April 2008	27%	57%	31%	5%	+52%
Barack Obama (D) September 2014	40%	75%	31%	7%	+68%
Donald Trump (R) May 2017	39%	82%	35%	7%	+75%
Donald Trump (R) Today (August 2017)	40%	80%	32%	8%	+72%

Average Presidential Job Approval at Lowest Point

Bush 41, Clinton, Bush 43, Obama



Trump May 2017



* Bush 41, October 1992
Clinton, June 1993
Bush 43, April 2008
Obama, September 2014

■ Approve ■ Disapprove



Economic Outlook – Economy Will Get Better by Party:

The gap between the parties has dramatically escalated.

President and Date	Total % Economy Will Get Better	President's Party % Economy Will Get Better	Opposite Party % Economy Will Get Better	Net Difference (President's Party – Opposite Party)
George H.W. Bush (R) September 1991	31%	40%	24%	+16%
Bill Clinton (D) September 1993	23%	31%	15%	+16%
George W. Bush (R) April 2001	36%	48%	25%	+23%
Barack Obama (D) September 2009	47%	66%	31%	+35%
Donald Trump (R) June 2017*	38%	66%	15%	+51%

*Data from CNBC Survey

Economic Outlook – Economy Will Get Better by Difference by Party

President's Party – Opposite Party



**Bush 41
(R)**



**Clinton
(D)**



**Bush 43
(R)**



**Obama
(D)**



**Trump
(R)**

