

Americans' Views on the Economy, Trade, Foreign Policy and the 2020 Election in Year Three of the Trump Administration

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RIETI Open Seminar

**AMERICAN PUBLIC OPINION REFLECTS THE
STRESSES OF A PEOPLE UNDERGOING RAPID CHANGE**

This dynamic country subjects its inhabitants to **more extreme contrasts and abrupt changes during a lifetime or a generation than is normally the case with other great nations**. Most of her inhabitants are faced, in their own lives...with alternatives presented by such **polarities as: open roads of immigration and jealous islands of tradition; outgoing internationalism and defiant isolationism; boisterous competition and self-effacing cooperation**...Thus the functioning American, as the heir of a history of extreme contrasts and abrupt changes, bases his final ego identity on some tentative combination of dynamic polarities

Erik Erikson

Childhood and Society, 1950

Americans Have Experienced Dramatic Societal and Economic Transformation in One Lifetime

	1967	2017
	%	%
Non-white	12	38
Foreign-born	4.9	14
White, no college education	75	39
Births to unmarried women	8.5	40.3
Women in the workforce	41	57
Church Membership	73	50
Share of wealth owned by top 1%	27	42
Portion of Workforce in Manufacturing	28	9

Source: Mehlman, Castagnetti, Rosen & Thomas analysis based on data from U.S. Census Bureau, Pew Research Center, U.S. Dept. of Labor and T. Piketty, Gallup

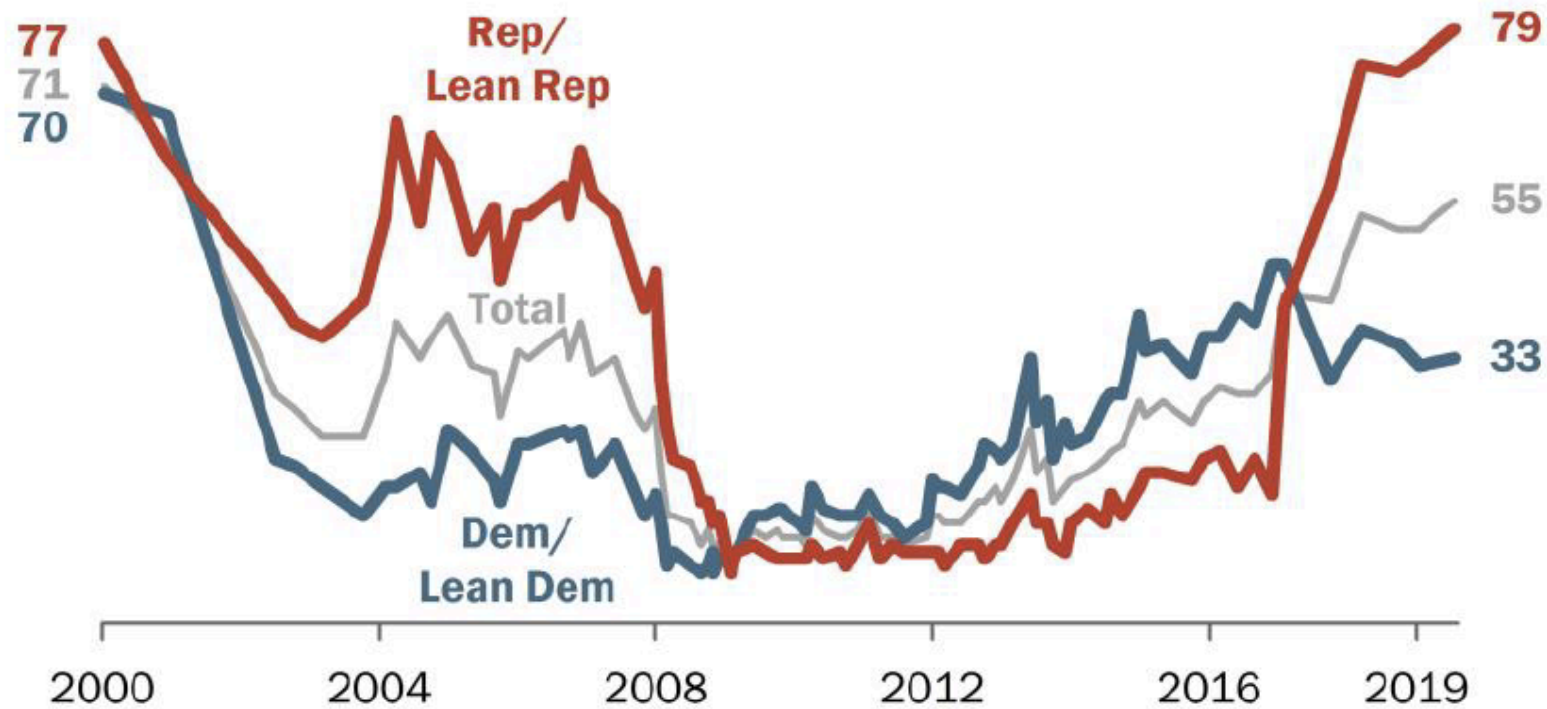
The 2016 Election Results in Butler County, Pa. Demonstrate That “It is Not Just the Economy Stupid”

	PA	Butler County
Poverty rate	13.1%	8.4%
Unemployment	6.5%	4.5%
Employment rate	77.6%	81.6%
Life expectancy	78.8	79.3
Median household income	\$55k	\$63k
Foreign Born	6.6%	2.2%
Vote for Trump	48.8%	66.7%

**PEOPLE FEEL GOOD ABOUT THE ECONOMY,
BUT ANXIETY REMAINS**

Since Trump took office, positive economic views have surged among Republicans, sagged among Democrats

% who rate national economic conditions as excellent or good

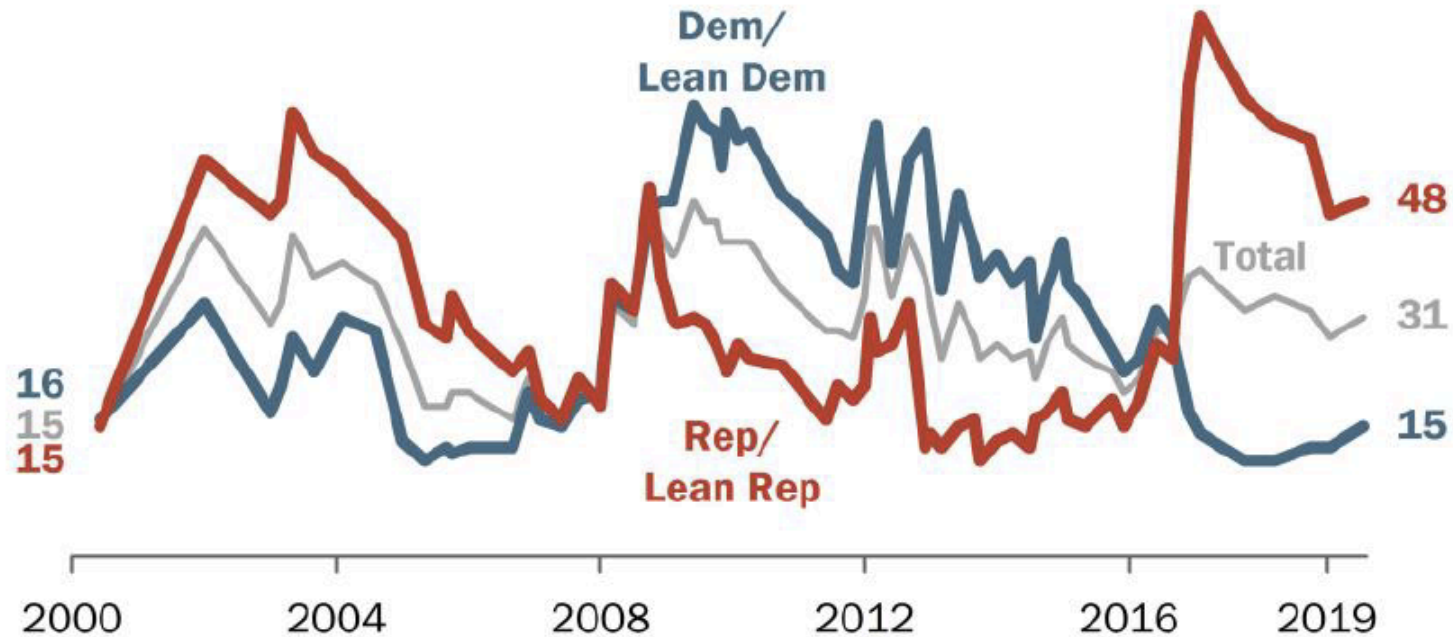


Source: Survey of U.S. adults conducted July 10-15, 2019.

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Economic expectations for the next year remain relatively unchanged

% who say they expect economic conditions in the country will be better a year from now

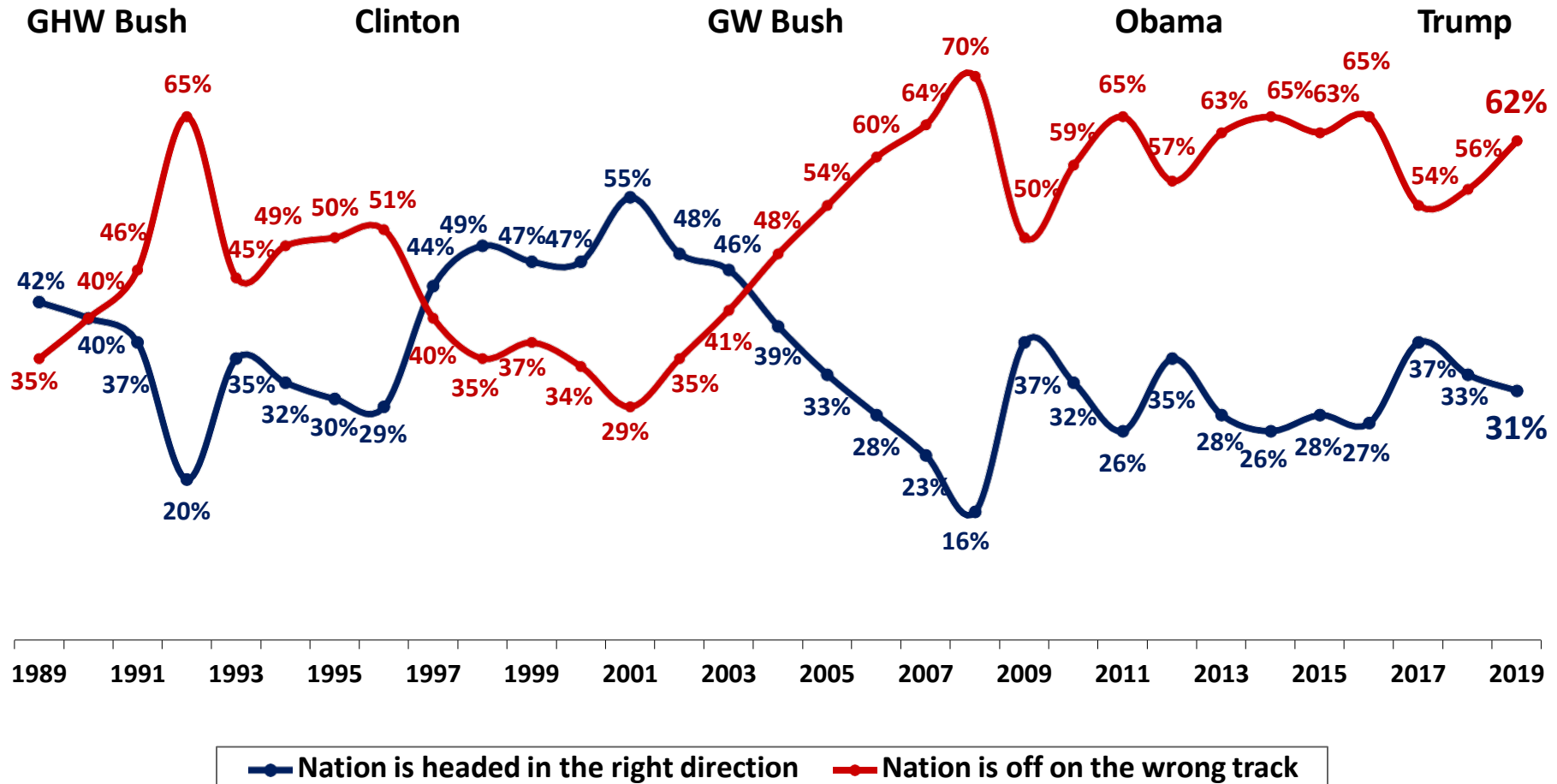


Source: Survey of U.S. adults conducted July 10-15, 2019.

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Right Direction/Wrong Track – Yearly Trend

Yearly Averages

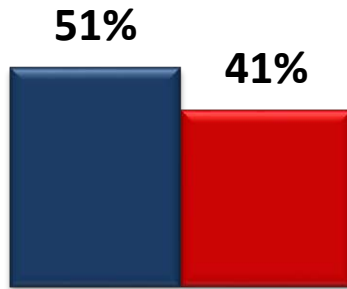


**SUPPORT FOR TRADE IS GROWING
AND THERE IS OPPOSITION TO TRUMP'S PROTECTIONISM**

Free Trade: Good or Bad?

	Good	Bad	D/S
GOP	48%	44%	+4%
IND	49%	40%	+9%
DEM	56%	37%	+19%

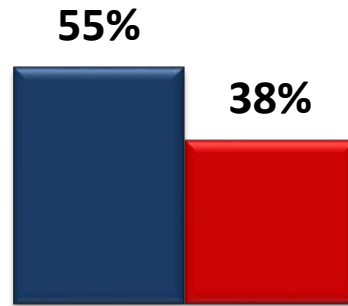
+10%



December 2015

	Good	Bad	D/S
GOP	51%	43%	+8%
IND	54%	38%	+16%
DEM	60%	32%	+28%

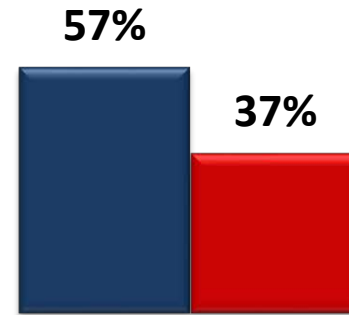
+17%



July 2016

	Good	Bad	D/S
GOP	46%	48%	-2%
IND	56%	37%	+19%
DEM	66%	28%	+38%

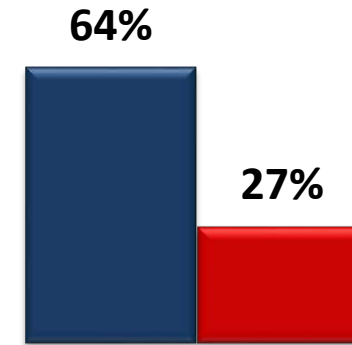
+20%



April 2017

	Good	Bad	D/S
GOP	52%	39%	+13%
IND	77%	15%	+62%
DEM	73%	20%	+53%

+37%



August 2019

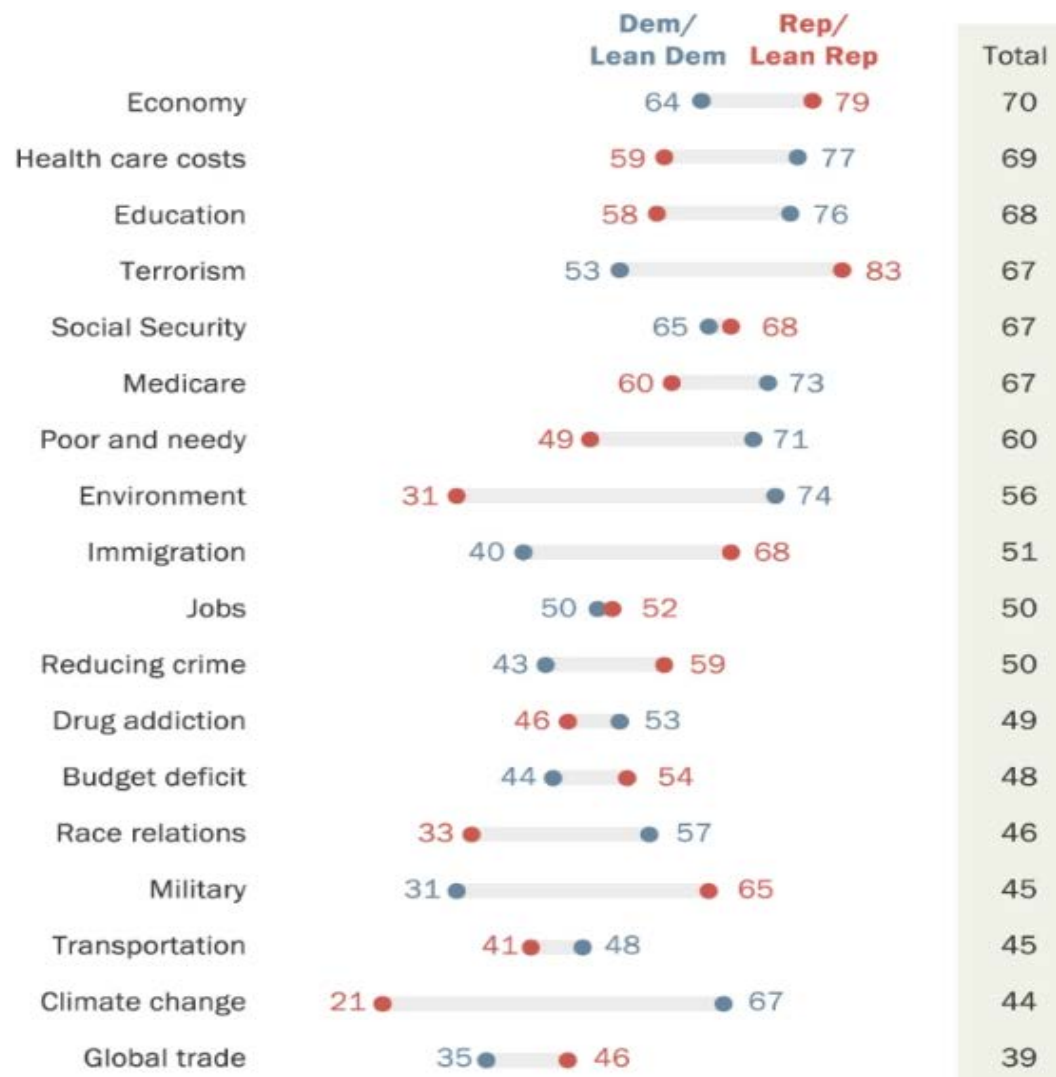
■ Free Trade is Good ■ Free Trade is Bad

Top Movers: Free Trade is Good

	April 2017	August 2019	Net Difference
Total	57%	64%	+7%
Independents	56%	77%	+21%
White Independents	53%	74%	+21%
Ages 35-49	48%	65%	+17%
Men College +	63%	78%	+15%
White Men College +	64%	79%	+15%
White Working Class	43%	56%	+13%
Conservatives	42%	55%	+13%
South Region	50%	63%	+13%
College Graduates	63%	76%	+13%
Ages 50-64	48%	60%	+12%
Men Ages 18-49	56%	68%	+12%
Men Ages 50+	57%	69%	+12%
Poor/Working Class	48%	60%	+12%
White Northeast Region	54%	66%	+12%
Men	57%	68%	+11%
White Men	57%	68%	+11%
Base Democrats	64%	75%	+11%
2016 Clinton Voters	68%	79%	+11%

But While Americans Have Strong, Increasingly Positive Opinions About Trade It's Not That Important to Them and Their Views Are Highly Partisan

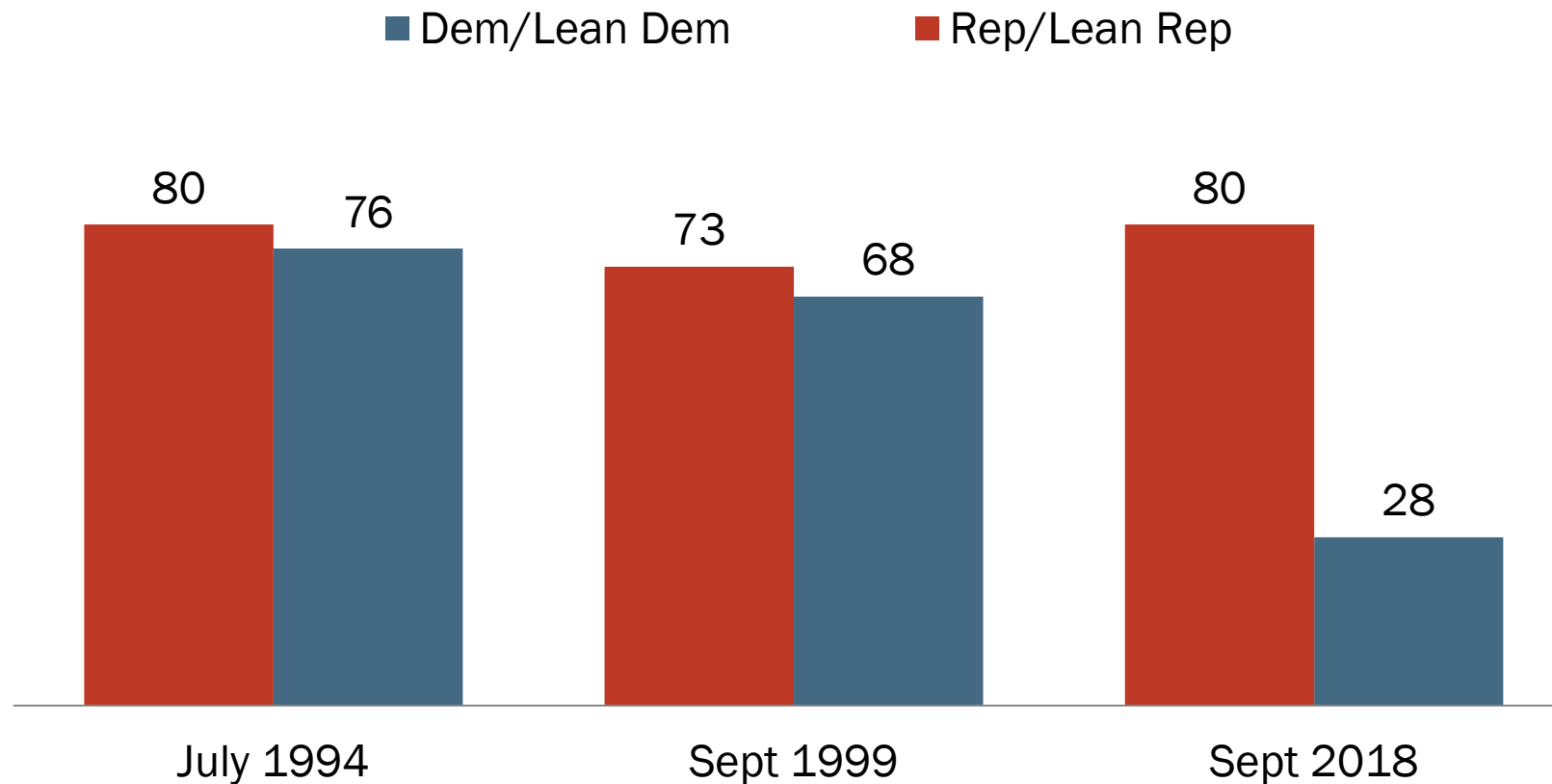
% who say ___ should be a top priority for Trump and Congress this year



Source: Survey of U.S. adults conducted Jan. 9-14, 2019.

Republicans See the U.S. as a Victim: They Believe That Other Nations Take ‘Unfair Advantage’ of the U.S.

% who say that other countries often take unfair advantage of the United States



Note: Don't know responses not shown.

Source: Survey of U.S. adults conducted Sept. 18-24, 2018.

The Public's View of Japan's Trade Fairness Has Improved Markedly

% of adults who think __ has a fair trade policy with the U.S.

	1993	2018	1993-2018 change
	%	%	
EU	52	56	+4
Japan	24	55	+31
Mexico	45	44	-1
Canada	77	65	-12
China	-	30	-

Source: Gallup poll conducted June 1993 and June 18-23, 2018.

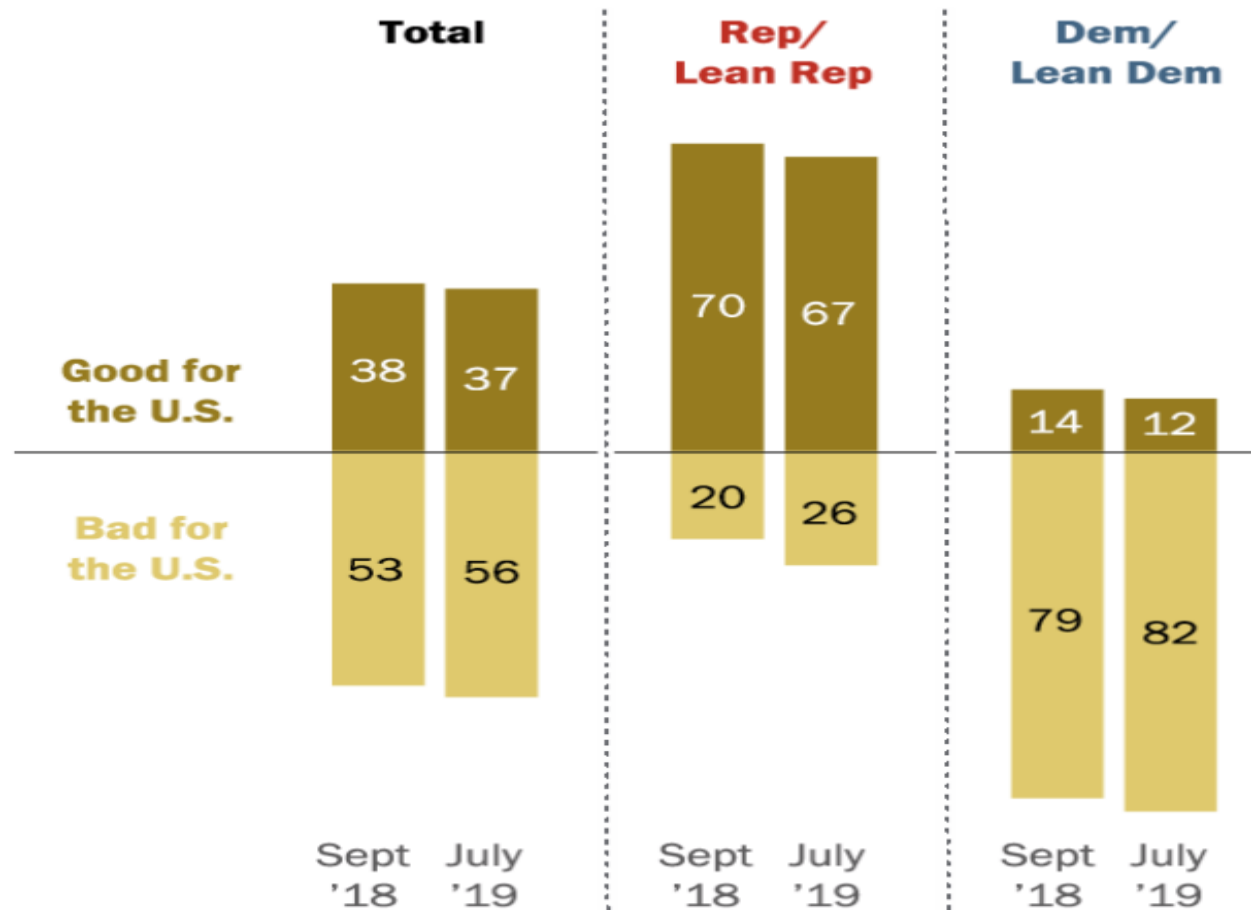
Partisan Perceptions of Trade Fairness Have Grown Over Time

% of adults who think __ has a fair trade policy with the U.S.

	1993	2018	1993-2018 change
	%	%	
Canada	77	65	-12
Republicans	81	49	-32
Democrats	76	82	+6
EU	52	56	+4
Republicans	54	42	-12
Democrats	51	70	+19
Mexico	45	44	-1
Republicans	47	29	-18
Democrats	42	59	+17
Japan	24	55	+31
Republicans	21	46	+25
Democrats	27	65	+38
China		30	
Republicans	-	21	-
Democrats	-	38	-

Partisans remain split over the impact of increased tariffs

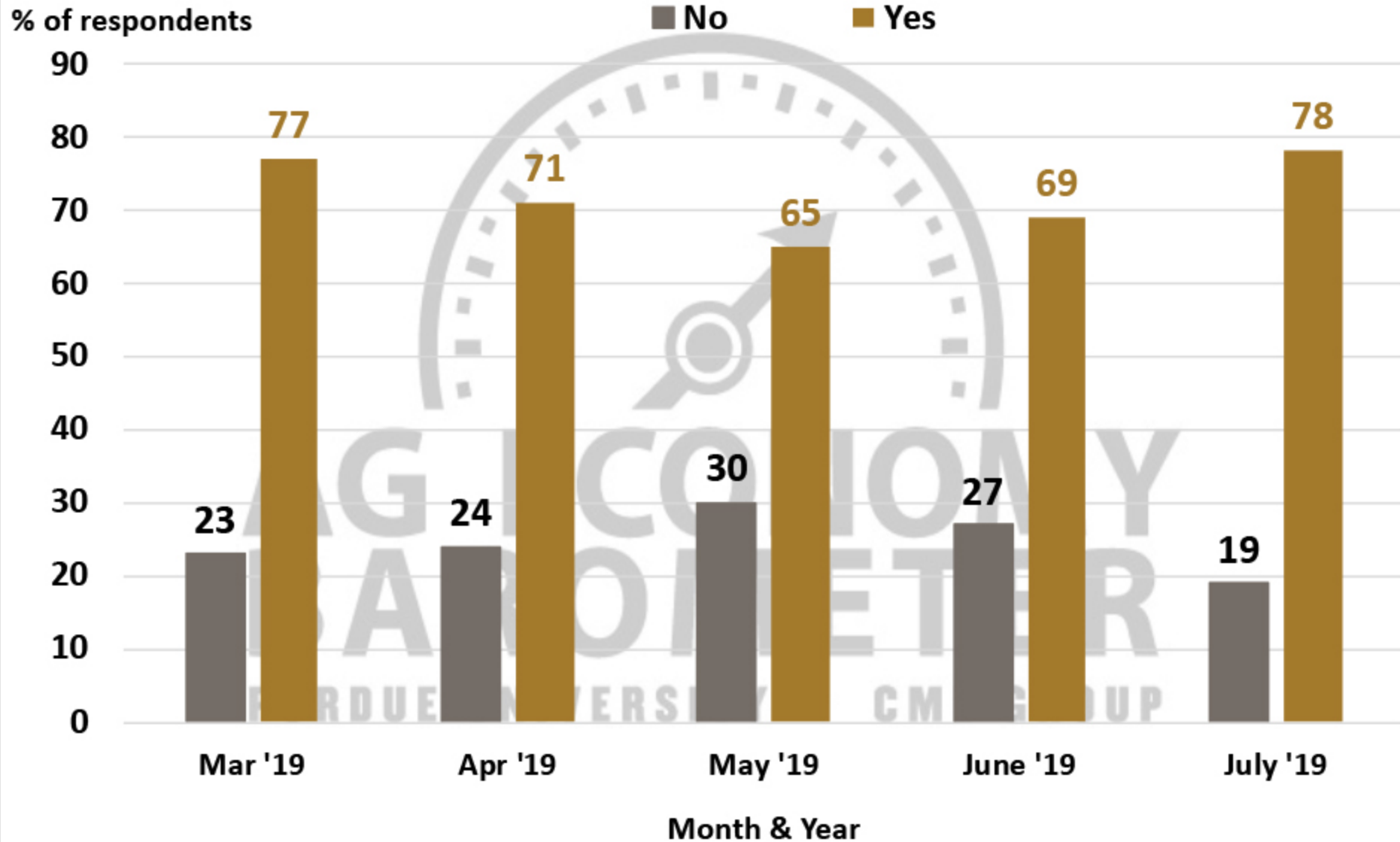
% who say increased tariffs between the U.S. and its trading partners have been ...



Note: September 2018 survey mentioned specific countries as examples in the question.

Source: Survey of U.S. adults conducted July 10-15, 2019.

Do You Think the Trade Dispute with China Will Ultimately Be Resolved in a Way That Benefits U.S. Agriculture?



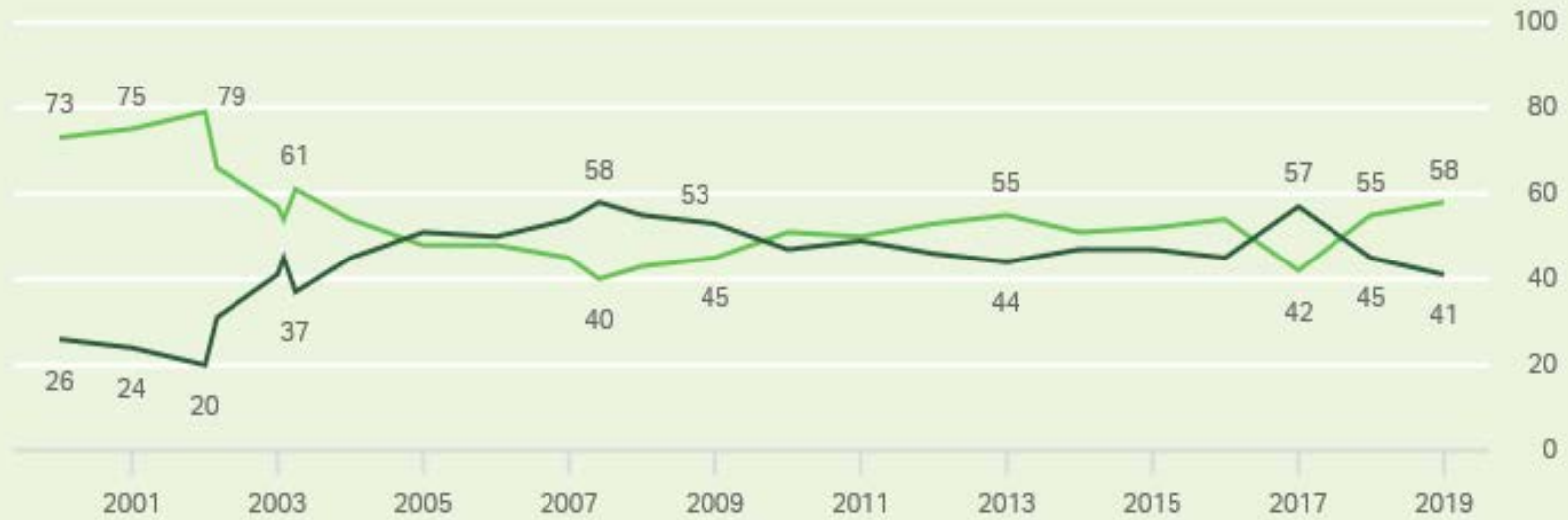
Source: Purdue Center for Commercial Agriculture, Producer Survey, July 2019

**AMERICANS MISPERCEIVE THEIR ROLE IN THE WORLD AND
HAVE CHANGING CONCERNS THAT ARE HIGHLY PARTISAN**

Perceptions of How United States Rates in World's Eyes

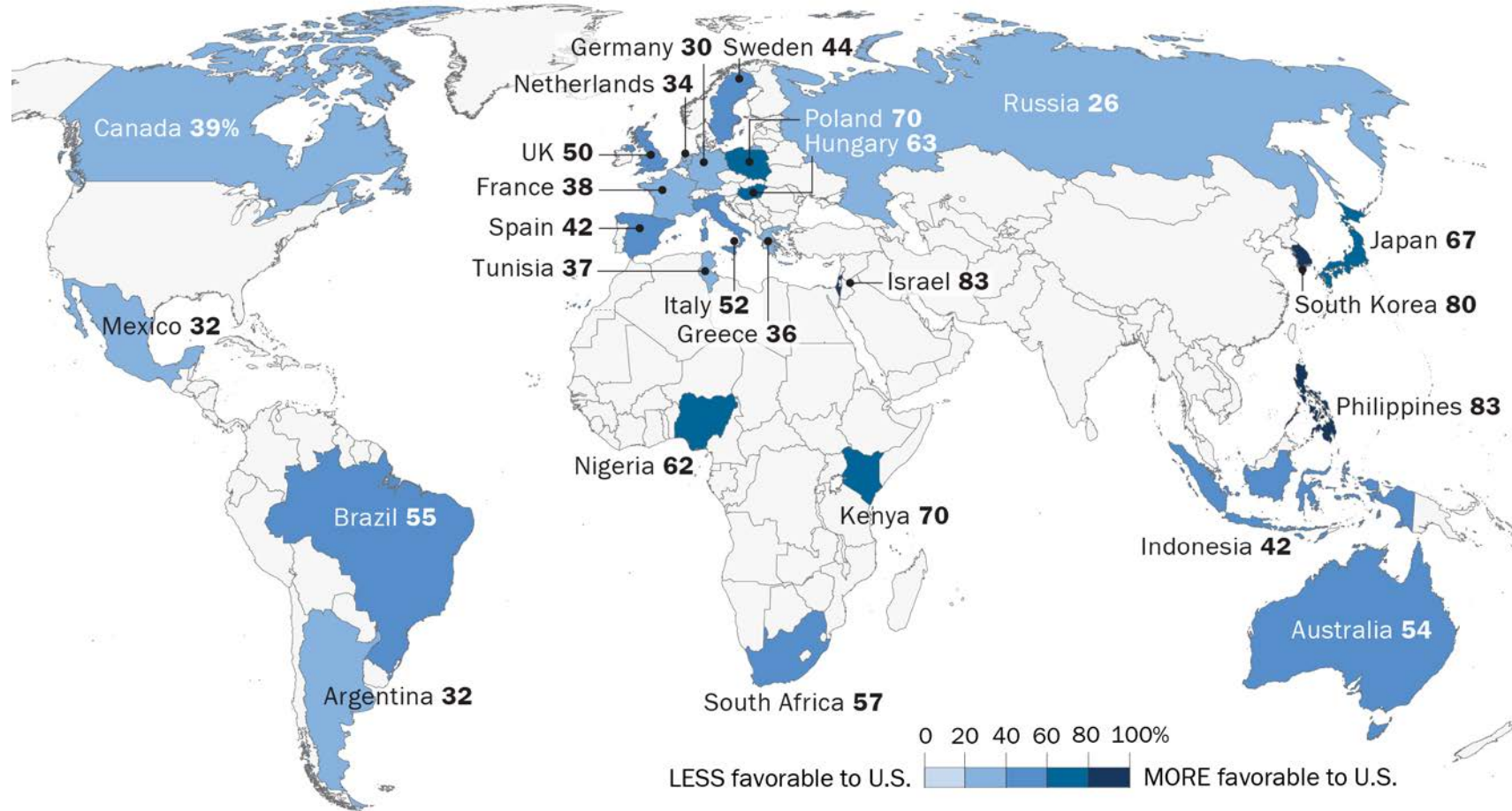
In general, how do you think the United States rates in the eyes of the world -- very favorably, somewhat favorably, somewhat unfavorably or very unfavorably?

■ Total % favorably ■ Total % unfavorably



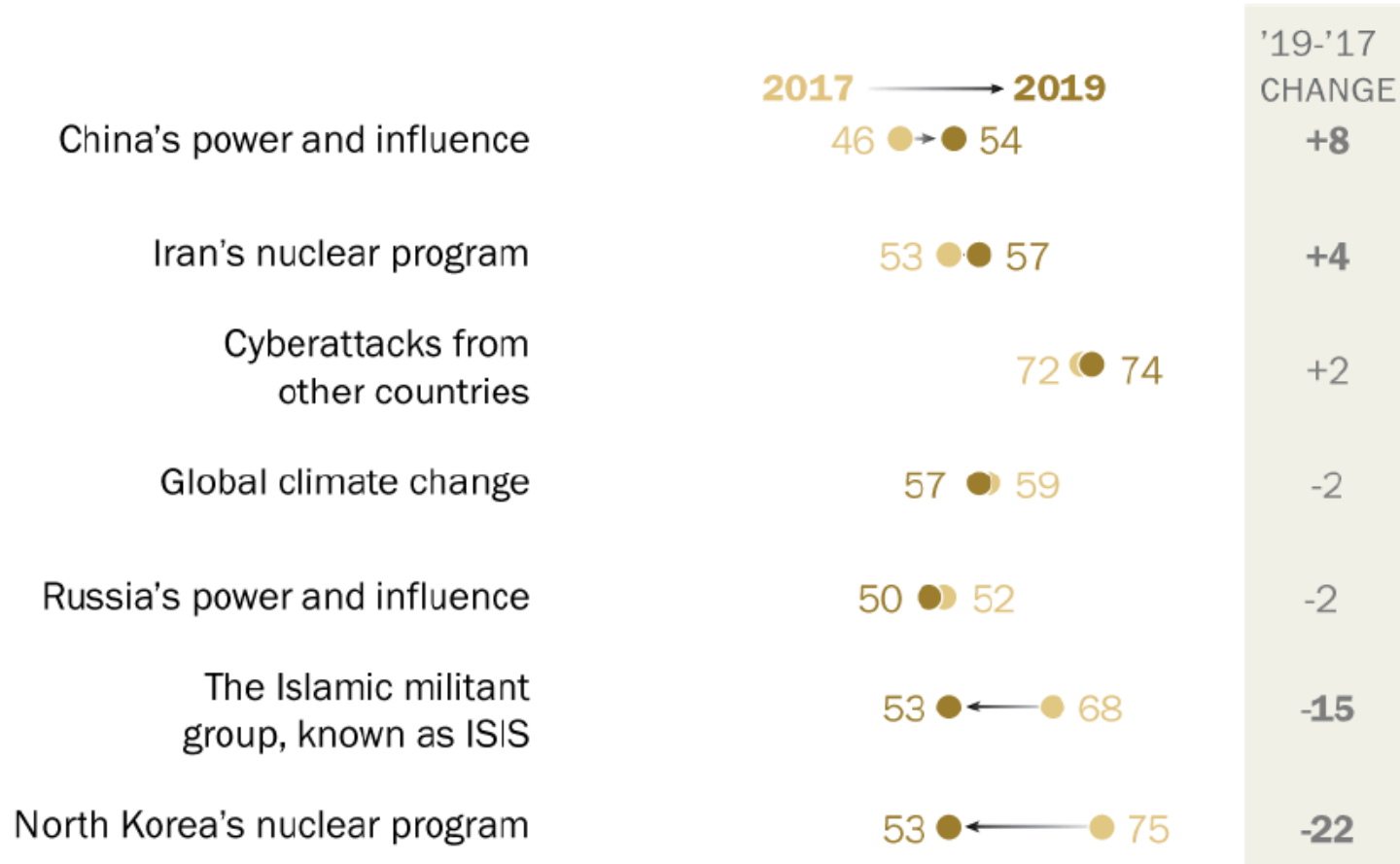
GALLUP

Favorable Views of the U.S. Prevail in Many Countries



Fewer Americans view North Korea's nuclear program, ISIS as 'major threats' than did so two years ago

% who say ___ is a major threat to the well-being of the United States

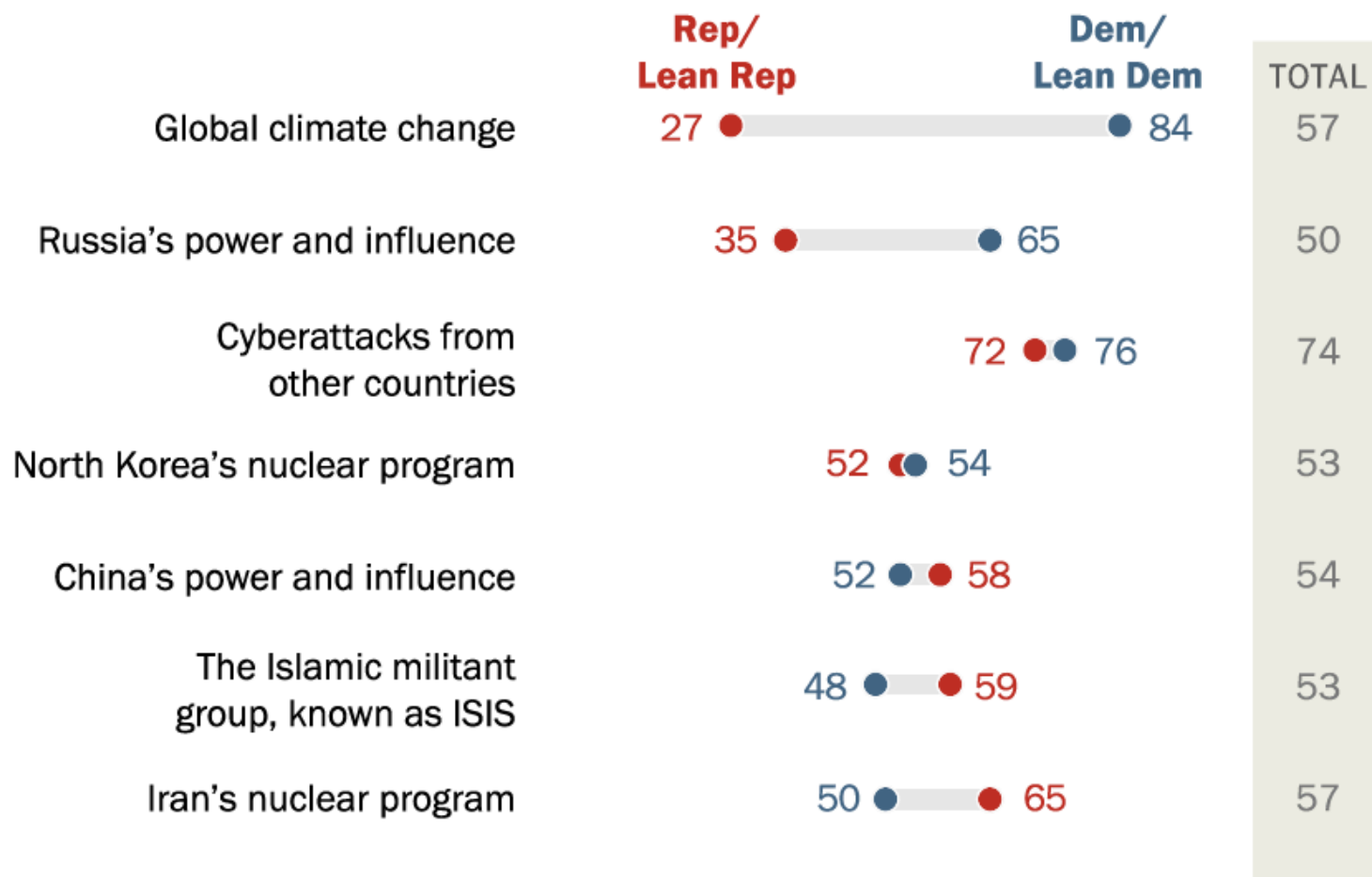


Note: Significant changes noted in **bold**.

Source: Survey of U.S. adults conducted July 10-15, 2019.

Wide partisan gaps on threat from climate change, Russia; smaller differences on Iran, North Korea

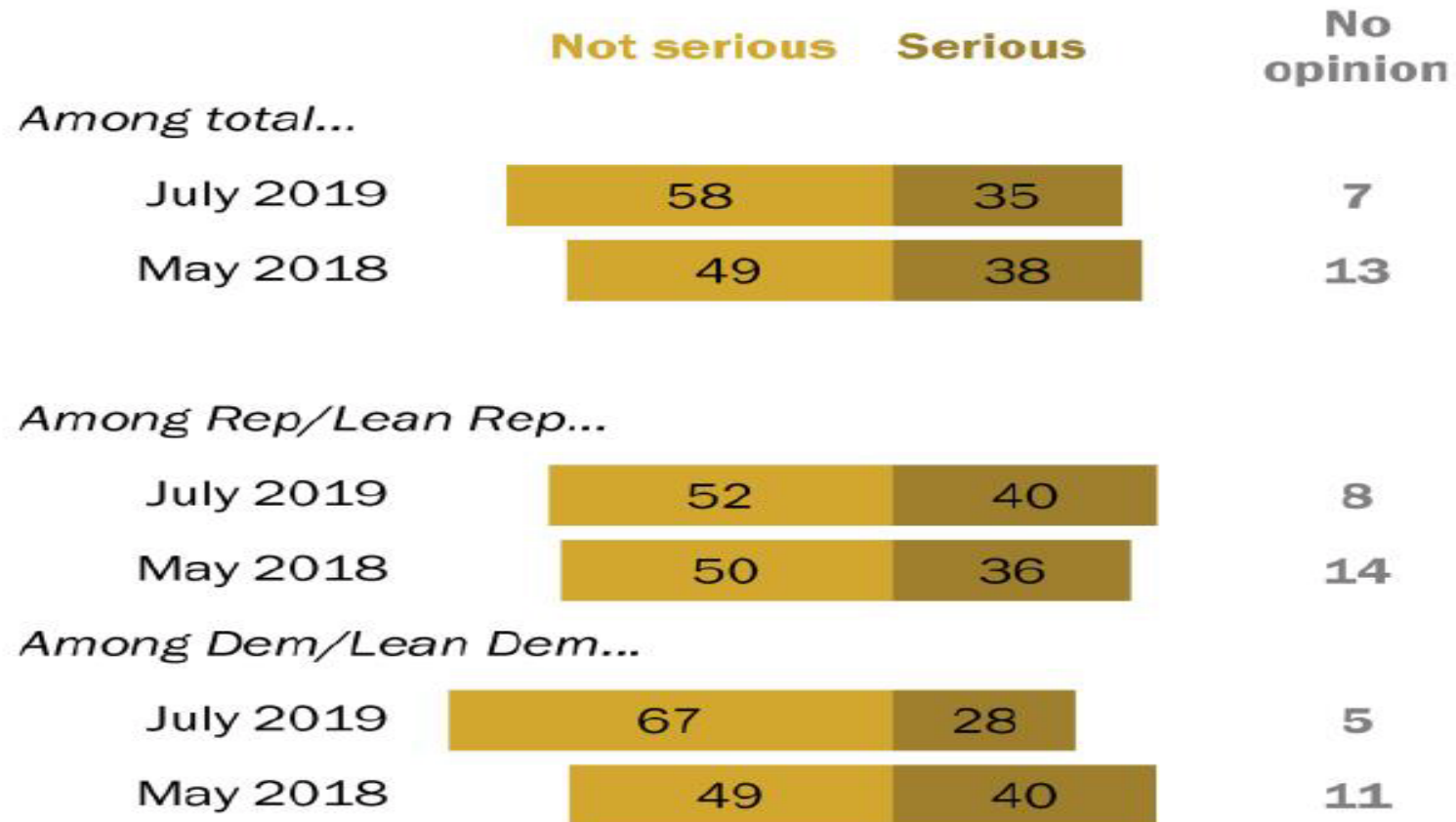
% who say each is a major threat to the well-being of the United States



Source: Survey of U.S. adults conducted July 10-15, 2019.

More Democrats say N. Korea is ‘not serious’ in addressing nuclear concerns

% who say North Korea’s leadership is _____ about addressing concerns about their nuclear program

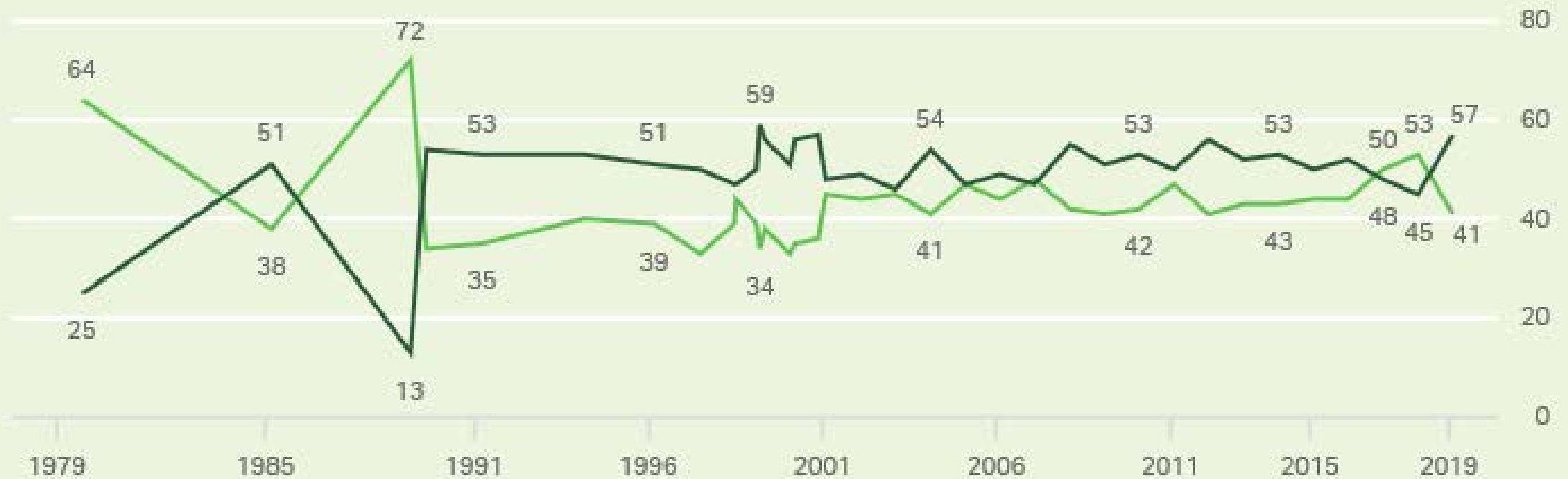


Source: Survey of U.S. adults conducted July 10-15, 2019.

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Is your overall opinion of China very favorable, mostly favorable, mostly unfavorable or very unfavorable?

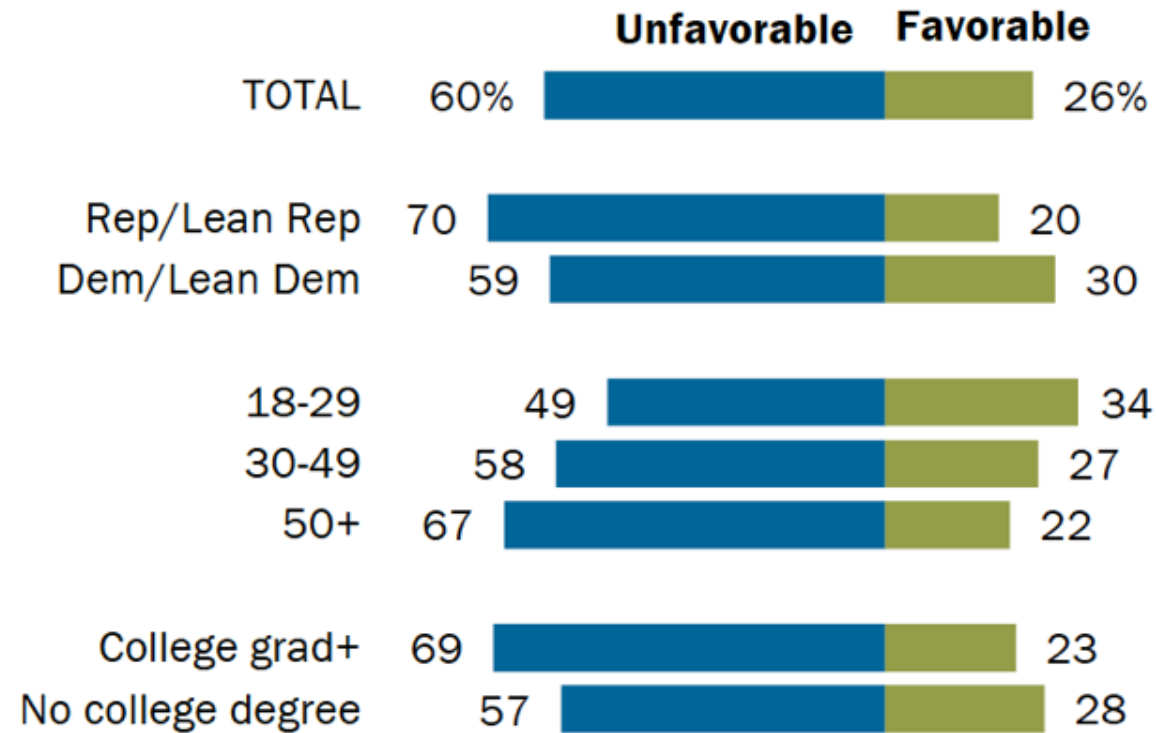
■ Total % favorable ■ Total % unfavorable



SOURCE: GALLUP

Republicans, college-educated and older Americans hold more unfavorable views of China

% who say they have a ___ opinion of China



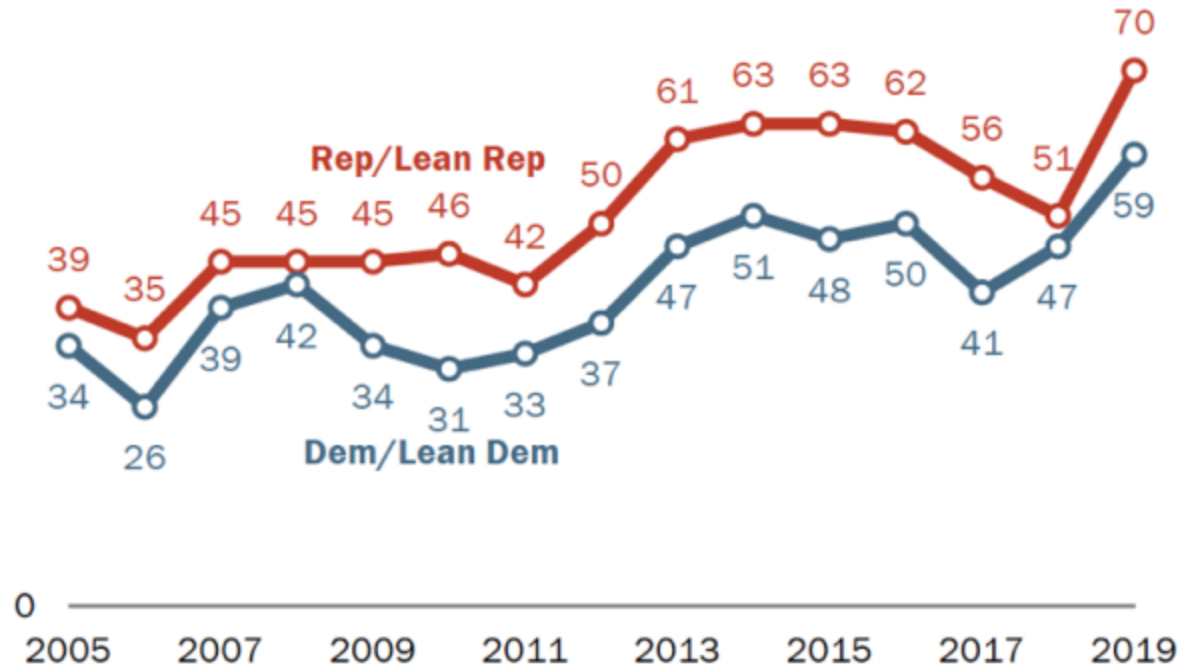
Note: Don't know responses not shown.

Source: Spring 2019 Global Attitudes Survey. Q8b.

Negative views of China increased sharply over the past year, particularly among Republicans

% who say they have an unfavorable opinion of China

100%

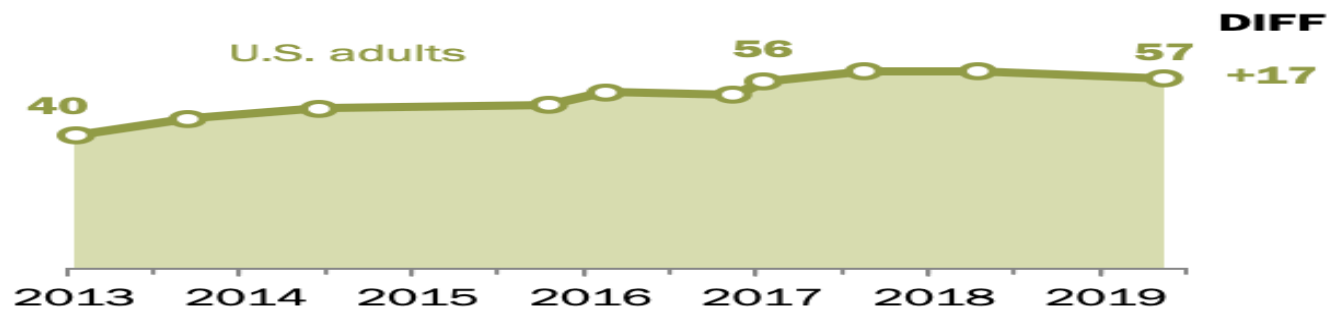


Source: Spring 2019 Global Attitudes Survey. Q8b.

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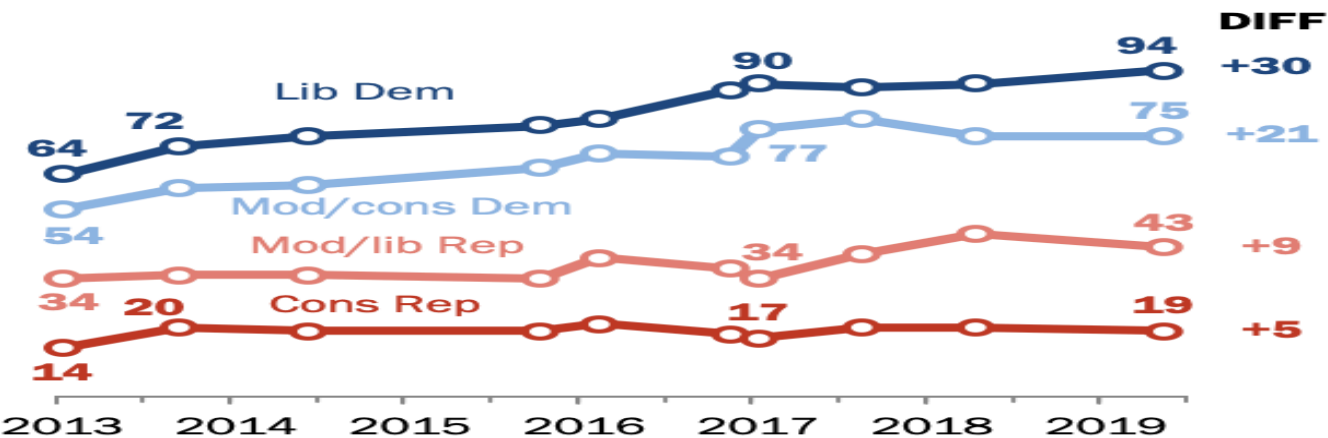
More Americans say climate change is a major threat than did so six years ago ...

% of U.S. adults who say global climate change is a major threat to the well-being of the United States



... but the increased concern is concentrated among Democrats

% of U.S. adults who say global climate change is a major threat to the well-being of the United States



Note: The question wording in March 2013, March 2017 and June 2018 asked about a "threat to the United States"; all other surveys asked about a "threat to the well-being of the United States."
Source: Survey conducted July 10-15, 2019, and prior surveys.

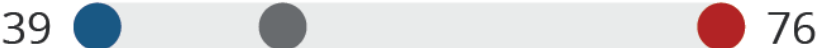
**A YEAR OUT FROM THE 2020 ELECTION HOW
AMERICANS ARE SEEING THE TRUMP ADMINISTRATION**

FIGURE 9. Republicans More Concerned with Cultural Change

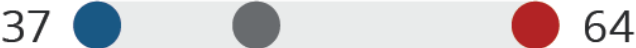
Percent who say...

● Democrat ● All Americans ● Republican

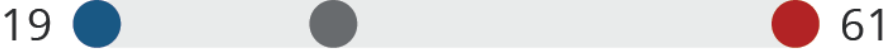
The American way of life needs to be protected from foreign influence



Since the 1950s, American culture and way of life has mostly changed for the worse



The impact of the U.S. becoming majority nonwhite by 2045 will be mostly negative



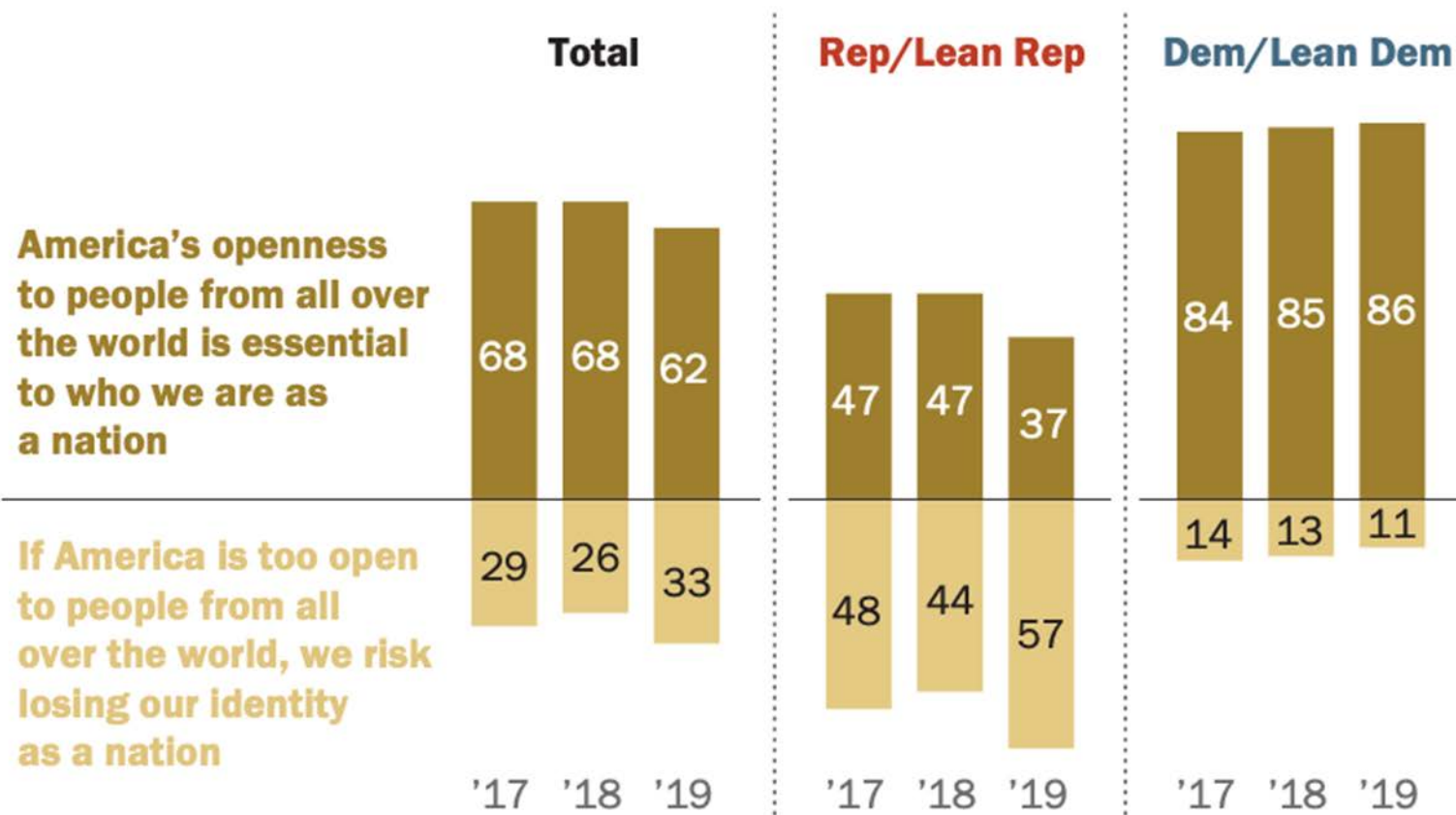
Things have changed so much that they often feel like a stranger in their own country



Source: PRRI 2018 American Values Survey.

Majority of Republicans now say America risks its 'identity as a nation' if it is too open to foreigners

% who say ...

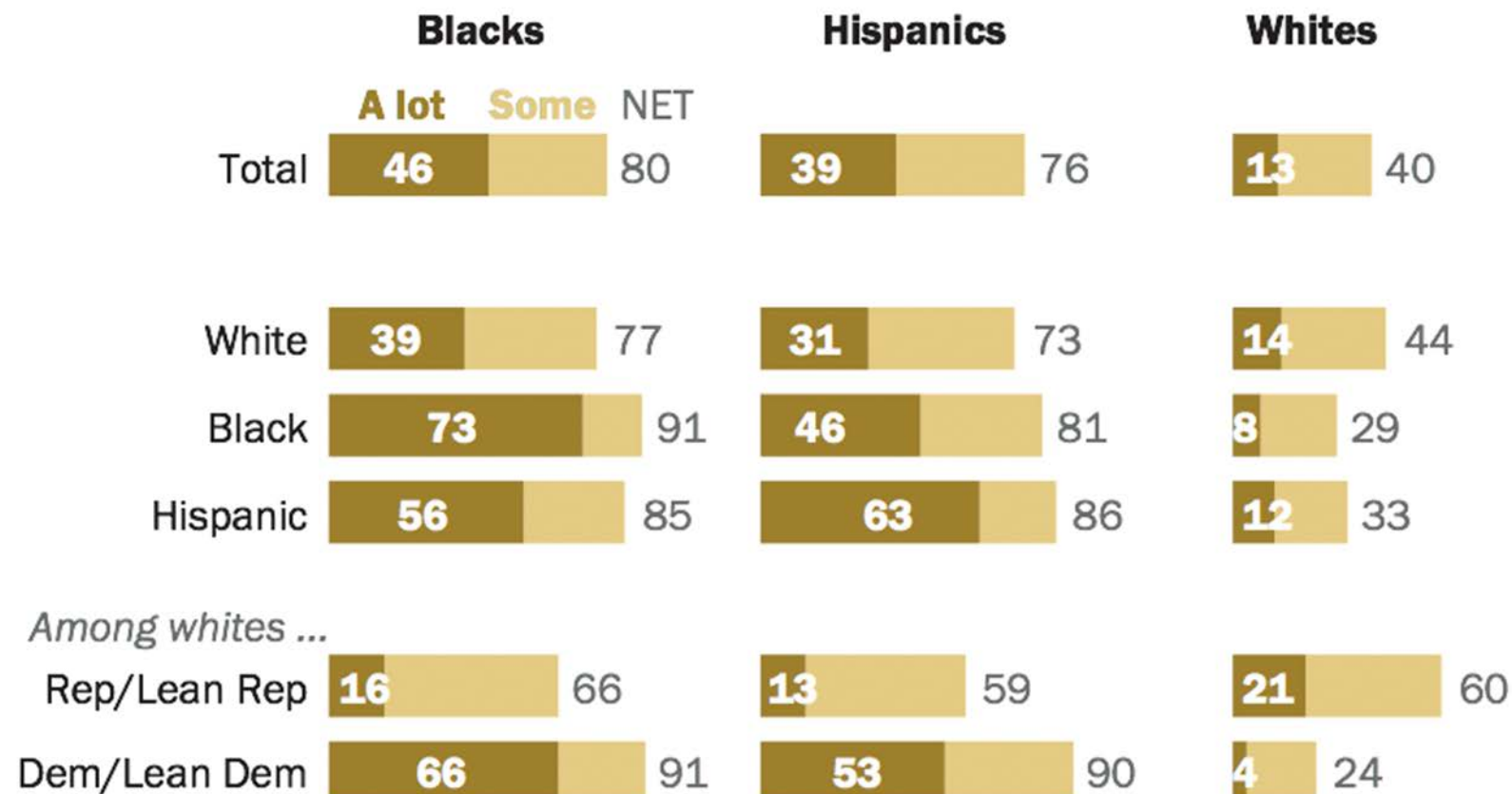


Note: Don't know responses not shown.

Source: Survey of U.S. adults conducted July 10-15, 2019.

White Republicans and Democrats far apart in views of discrimination against racial and ethnic groups

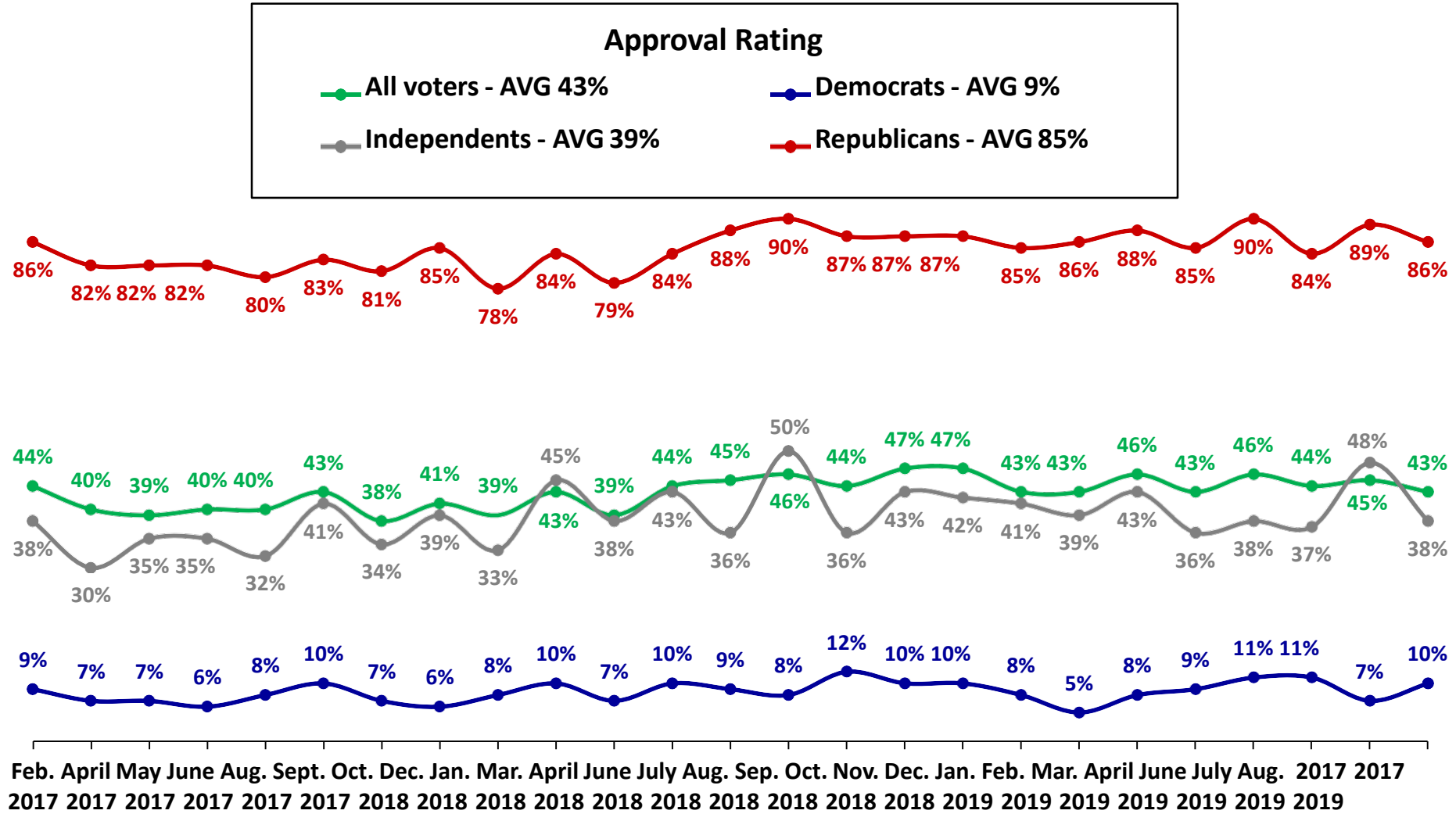
% who say there is ____ (of) discrimination against each group in our society



Note: Whites and blacks include only those who are not Hispanic; Hispanics are of any race.

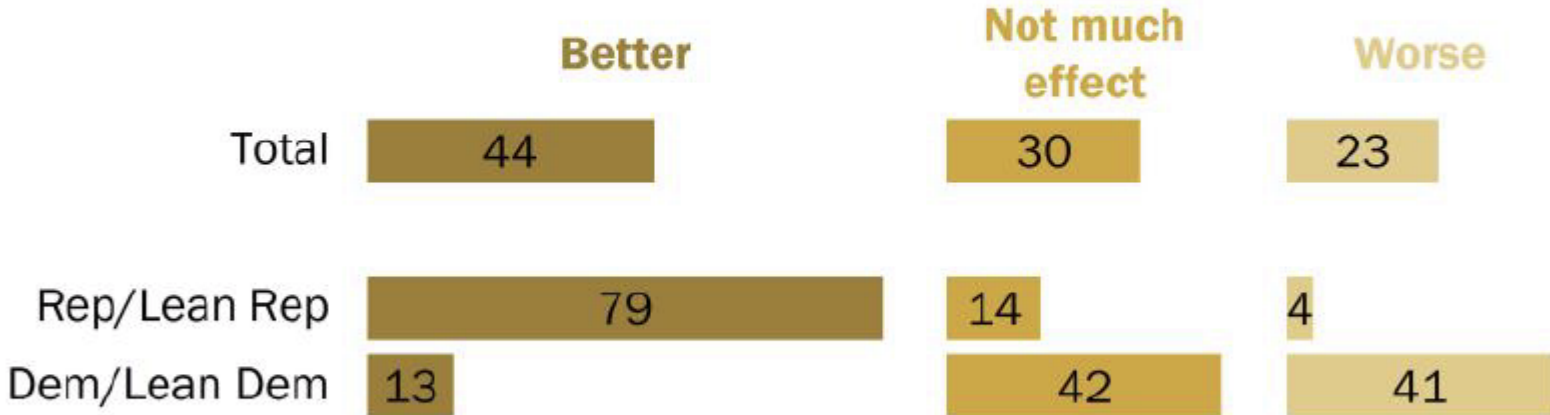
Source: Survey of U.S. adults conducted March 20-25, 2019.

Trump Job Approval, by Party



More say Trump's policies have made economy better than worse; nearly a third say they've had little impact

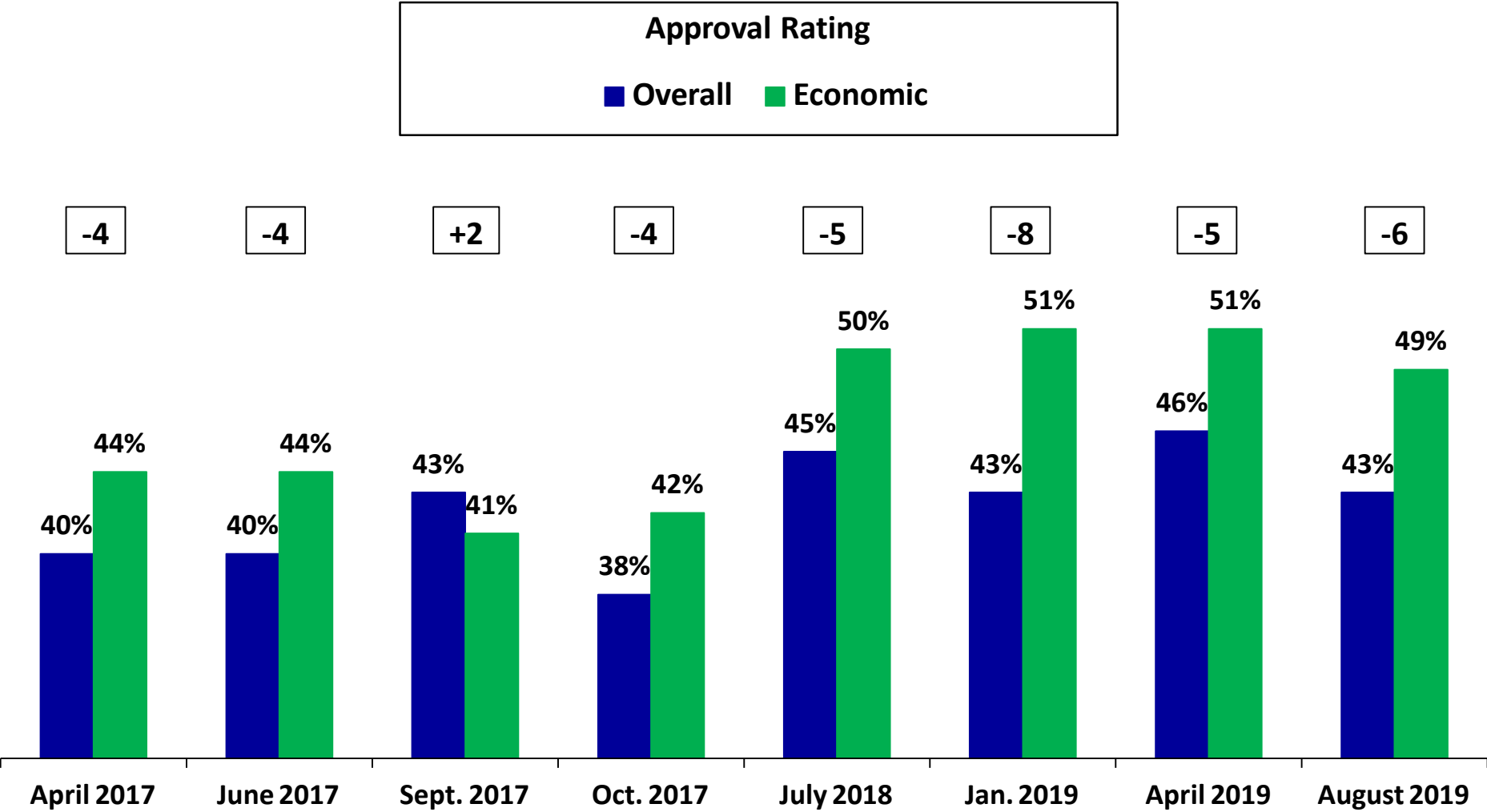
% who say Donald Trump's economic policies have made economic conditions ...



Source: Survey of U.S. adults conducted July 10-15, 2019.

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Trump Economic vs Overall Approval



Trump draws more confidence on the economy, trade than on other issues, especially dealing with Congress

% who say they are very or somewhat confident in Donald Trump's ability to ...

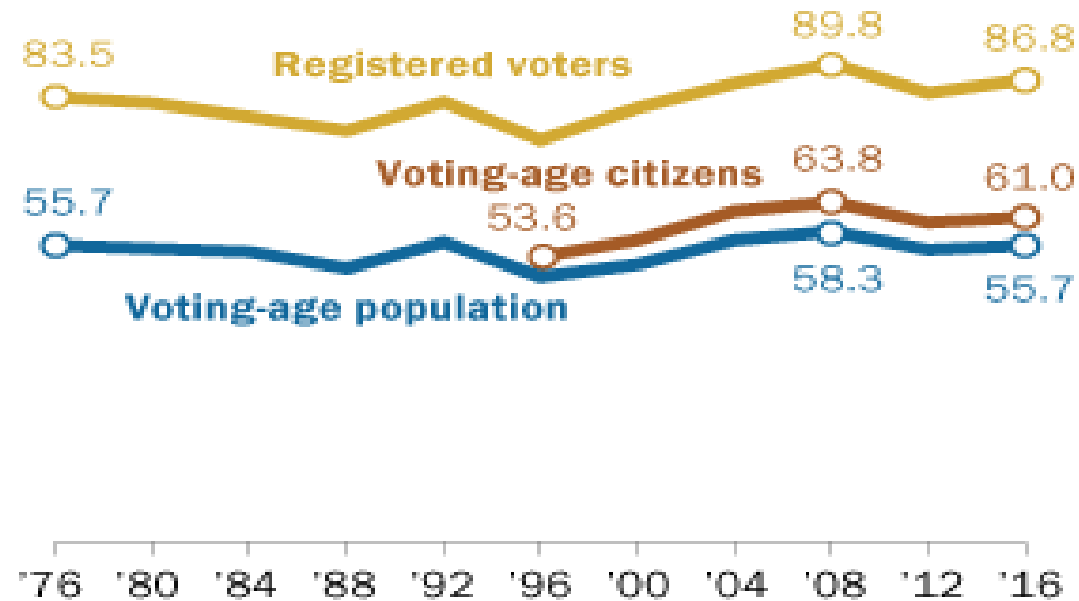


Source: Survey of U.S. adults conducted July 22-Aug. 4, 2019.

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Turnout in U.S. presidential elections

Votes cast as a share of ...

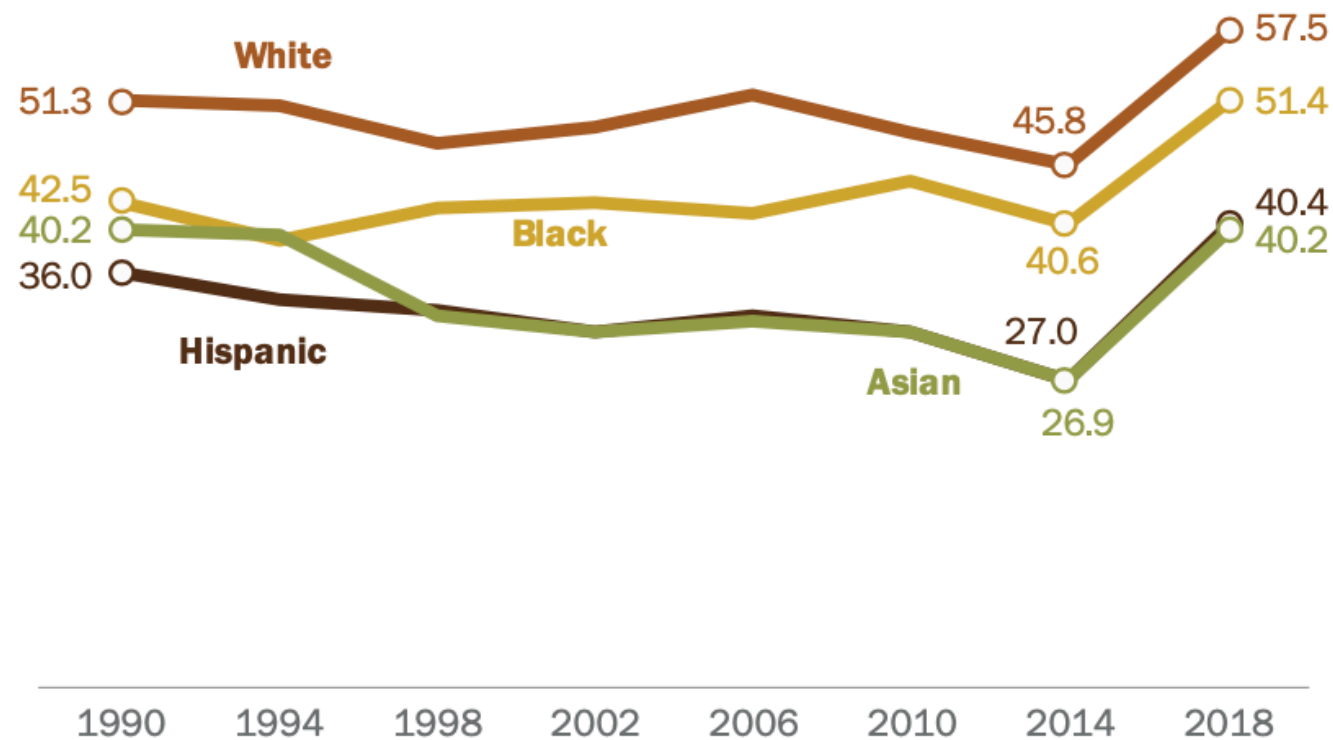


Source: Census Bureau (population estimates), House Clerk's office and Pew Research Center (vote totals).

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Voter turnout rate increased sharply across racial and ethnic groups during 2018 midterm elections

% of eligible voters who say they voted, by midterm election year

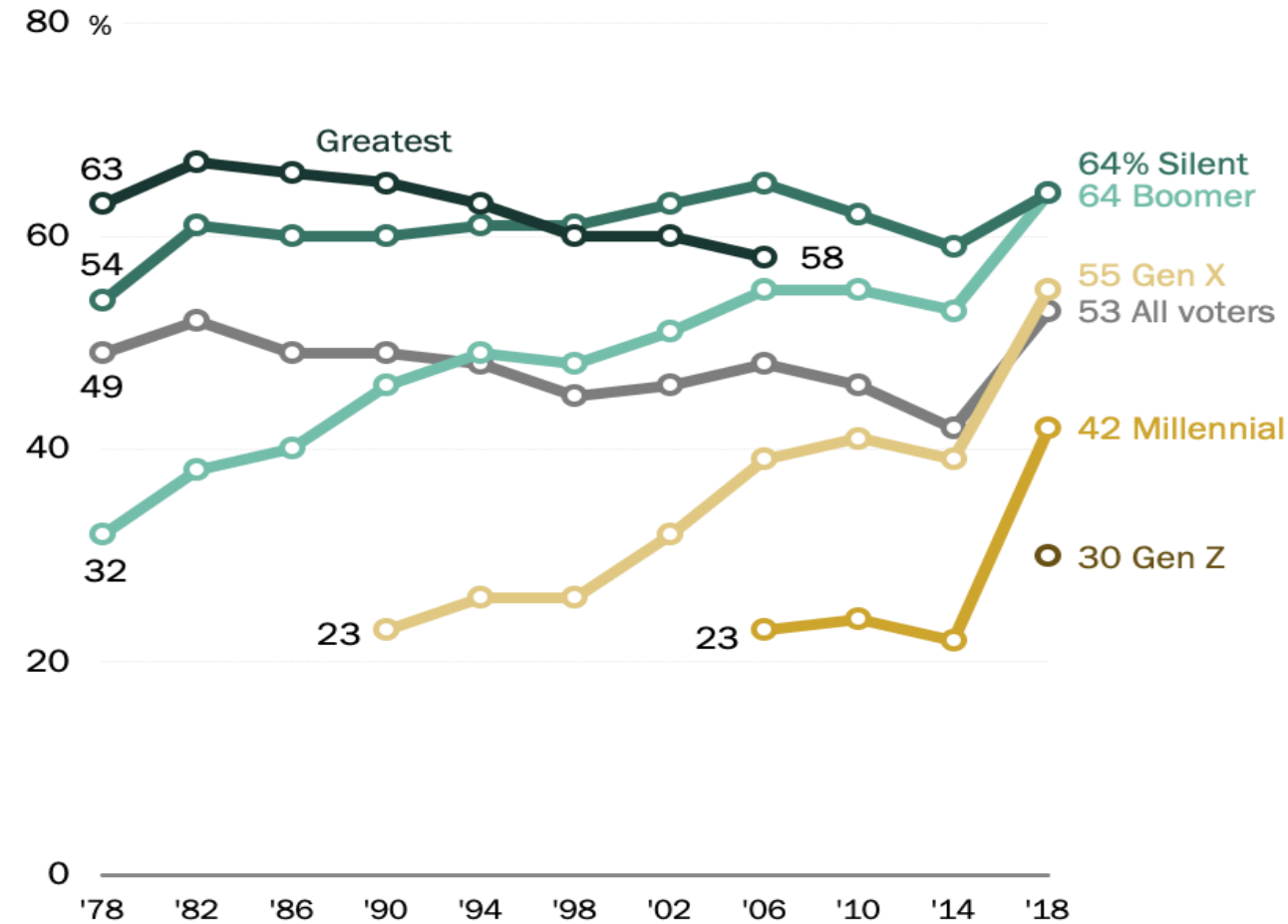


Note: Eligible voters are U.S. citizens ages 18 and older. Whites, blacks and Asians include only non-Hispanics. Hispanics are of any race.

Source: Pew Research Center analysis of the Current Population Survey, November Supplements, 1990-2018.

Millennial turnout nearly doubled from 2014 to 2018

% of eligible voters who reported voting in midterm elections



Note: Eligible voters are U.S. citizens ages 18 and older. Due to age topcoding, the voter turnout rates for 2010-2018 for the Silent Generation are likely underestimated. Turnout rates for the Greatest Generation from 1994-2006 are also likely understated.
 Source: Pew Research Center analysis of 1978-2018 Current Population Survey November Supplements (IPUMS and U.S. Census Bureau).

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