

Inequality for All

Impact measurement baselines

Introduction

Inequality for All is a documentary that aims to shift and elevate public discourse around the causes and impacts of economic inequality.

The Harmony Institute was commissioned to help the film's stakeholders develop a framework to understand and measure the progress of the campaign. The first step toward developing a meaningful framework for media evaluation is to establish baselines for comparison prior to a project's release. These data points help refine campaign goals, inform the selection of appropriate metrics for gauging impact, and guide strategic decisions over the project's lifespan.

Toward this end, the Harmony Institute gathered and analyzed data from four main sources: public opinion polls, social media, content in the press, and Congressional Record transcripts, to identify baselines for public perceptions of economic inequality among Americans. This report details the findings, and develops a framework for further evaluation.

The study was prepared for the filmmakers, outreach partners, and stakeholders of *Inequality for All*, and was underwritten by a grant from The Fledgling Fund.

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Background

Inequality for All addresses pressing economic and political challenges facing the American public. With the expert guidance of former Secretary of Labor Robert Reich, the film depicts personal stories of struggling middle class families, presents economic data from the past forty years, and explores the stark inequalities that fracture our society. *Inequality for All* frames these conditions as the result of a series of choices and policies made by the public and its leaders. Rather than accept these as inevitable, the film conveys a message of empowerment and agency to build a more just society.

The Harmony Institute (HI) is an independent research center that studies the social impact of entertainment. In this guide, HI provides baseline measures so that outcomes and longer term impact can be accurately measured throughout the campaign. This document, the attached evaluation framework, and the viewer and partner surveys, represent the first stage of a comprehensive study. Future research will help drive strategic choices throughout the campaign. Longitudinal impact evaluation will ultimately assess the extent to which *Inequality for All* met its objectives and provide insights and implications for future projects and organizations that address economic inequality.

The data and analysis in this guide address the campaign's overarching goal to "elevate and shift the public discourse about the causes and impacts of inequality, setting the stage for specific conversations about what can be done, be it through behavioral, societal, or political change." A systematic, authoritative study of the issue of economic inequality is far beyond the scope of this report. Rather, the following data and analysis situate the messages of *Inequality for All* and its social action campaign within the context of public perceptions of economic inequality.

Research design and timeline

HI designed this study as the first component of a three-part research design. Although each of these components can function individually, they will be most effective when applied as a group over the course of the film's release and campaign.

Part 1: Measurement baselines and framework, August 2013

This report surveys available data on perceptions of economic inequality to situate the film's release within a social context. These baselines, in the form of public opinion and discourses in the press and congress, allow impact to be measured more accurately, relative to original conditions and contexts. At this first stage, HI has set up data collection mechanisms (monitors of the press, social media, and the Congressional Record) and research instruments (the viewer and partner surveys) to be administered throughout the campaign.

Part 2: Intermediate measurement, 2014

The second component of the research design will directly measure the outputs and outcomes of the social action campaign with an emphasis on finding actionable data to help the campaign meet its social change objectives. It will rely on the instruments developed during the first stage to collect and analyze data during the campaign. Research at this stage of the project will help determine which audiences and partners are responding to the film, which may have been overlooked, and how audiences and partners are using the film to address economic inequality.

Part 3: Impact evaluation, 2015

The third stage of the project will synthesize the direct measurement from part 2 with the macro-level data in part I. This component will provide evidence of larger changes in perceptions and conditions of economic inequality in the United States. It also will track longer term impacts such as political legislation or changes in economic conditions. Analysis at this final stage will offer implications for media makers and organizations working to reduce economic inequality.

The completion of part 1 of this study provides the outreach team with a systematic map of campaign goals, activities, and data sources; baseline data on perceptions of economic inequality; and a viewer and partner survey to measure campaign activities. The completion of parts 2 and 3 will follow, contingent upon additional financial support for the study.

Public opinion

Underlying the distribution of wealth in American society lies a mix of perceptions, values, and policies. *Inequality for All* has the potential to impact these beliefs through a narrative that explains our present economic and political situation, its historical causes, and human costs while also emphasizing that solutions are within our control.

Although there is a wealth of public opinion data that characterizes American attitudes on economic inequality, many debates begin with an ambiguous set of assumptions, often expressed as the “American dream.” Broadly, this ethos holds that with hard work and individual choices, any American can reach prosperity, regardless of class, race, religion, etc. A corollary to this set of beliefs is that Americans are willing to accept some inequality and are resistant to redistributive efforts by the government to reduce economic inequality. Public opinion polls offer an empirical measure of how widely such beliefs are held.

Q: It is the responsibility of the government to reduce the differences in income between people with high incomes and those with low incomes.

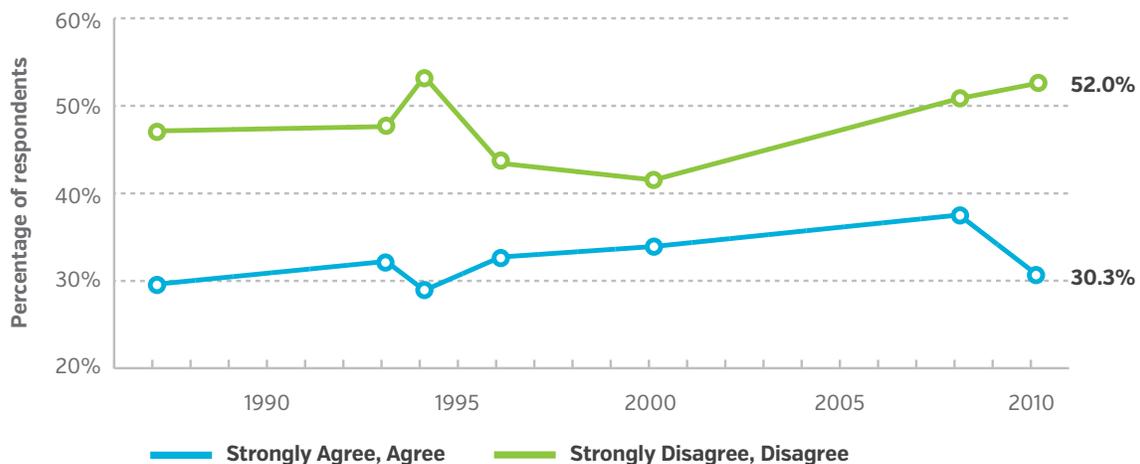


Figure 1. Question from the 1987, 1993, 1994 2000, 2008 and 2010 General Social Survey (GSS). The answer choice “neither” is not included here. All GSS percentages are derived from the composite weight variable [COMPWT] from the SDA version of the GSS. More information on weights is available at: <http://sda.berkeley.edu/D3/GSS12/Doc/gs12.htm>.

Figure 1 addresses American attitudes on government efforts to reduce income inequality. The data in Figure 1 offers some support for the belief that Americans are resistant to government efforts to combat inequality. However, this position is far from absolute. Explicit support for government interventions to reduce inequality has hovered between 30% and 40%, while opposition has varied between 40% and 55% over the last 20 years.

Q: Do you think the government does too much, not enough, or about the right amount for middle class people?

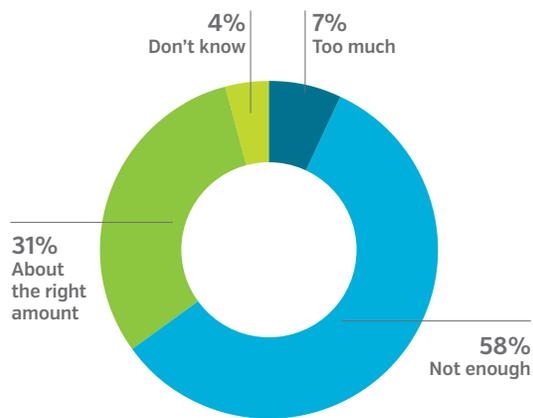


Figure 2. Question from Pew Research Center for the People & the Press Generations Survey, September, 2011. Percentages are based on a national adult sample of 2,410 respondents.

Q: Inequality continues to exist because it benefits the rich and powerful.

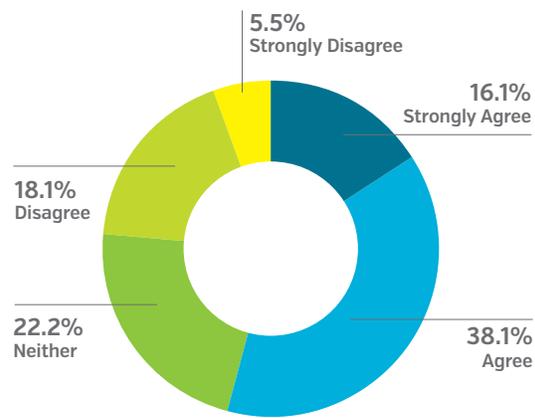


Figure 3. Question from the 2008 GSS. Percentages are based on a weighted sample of 989.4 respondents. Respondent numbers for GSS data in this report are not whole numbers due to composite weighting.

Importantly, when this issue is framed in different terms, Americans take a different view toward government efforts to reduce inequality. For example, Figure 2 shows the results of a 2011 Pew survey that asked whether the government does enough to assist the middle class. According to this survey, nearly 60% of Americans believe that the government does not do enough for middle class people, and only 7% believe that it does too much. Figure 3, from the 2008 General Social Survey (GSS), shows that 54.2% of Americans agree or strongly agree that inequality benefits the rich and powerful.

This complex, even contradictory set of beliefs about inequality and the middle class indicates that this issue is far from settled. *Inequality for All* generally emphasizes middle class frames and terminology that resonate with a majority of Americans. Its narratives of the plight of middle class families, such as the Rasmussens who identify as socially conservative, reflect

broader American public opinion. Research throughout the campaign should explore changes in viewer attitudes about inequality’s effects on the middle class and the role that the government can play in reducing it.

Q: Differences in income in America are too large.

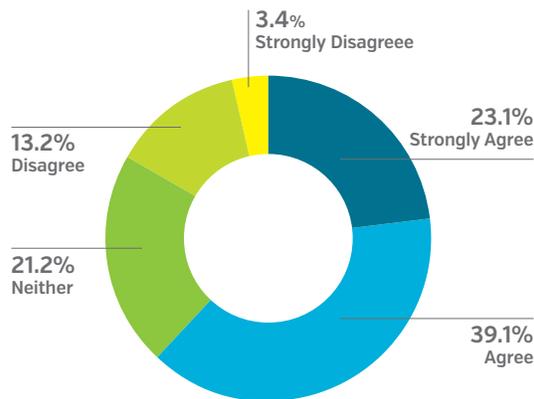


Figure 4. Question from the 2008 GSS. Percentages are based on weighted sample of 1,015.8 respondents.

Q: Compared to ten years ago, do you think there is a wider gap or narrower gap between standards of living of middle class people and rich people?

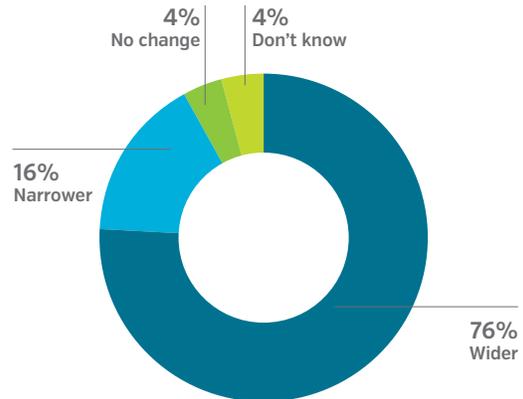


Figure 5. Question from Pew Research Center for the People & the Press Values Survey, April, 2012. Percentages are based on a national adult sample of 3,008 respondents.

If there is some ambiguity in the role Americans think government should play, it is clear that a majority of Americans recognize that economic inequality is a problem. Figures 4 and 5 detail current American perceptions on inequality as well as its growth in recent times. Figure 4 shows data from the 2008 GSS. A majority of Americans agree with the normative statement that income differentials are too large—62% of Americans either agree or strongly agree, compared to only 16.6% who disagree or strongly disagree. A Pew study from 2012 indicates that the public also believes that this gap has increased in the past ten years—76% say that the differences in living standards between the middle class and the rich have grown.

In this context, it is reasonable to expect the main messages of *Inequality for All* to resonate with a majority of American viewers, despite the polarized political climate. To measure the impact of the film and campaign, research at later stages should measure growth in these majorities and look for thresholds (yet to be defined) for social and political action.

Public opinion polls also show an increased skepticism about tenets of the American dream, although it still plays a role in shaping national discourse. With the caution that correlation does not imply causation, Figure 6 demonstrates a recent decline in the belief that hard work is sufficient for achieving economic success. As Americans recognize widening economic inequality, they have also become more skeptical of the idea that hard work on its own is sufficient to ensure economic prosperity and social mobility.

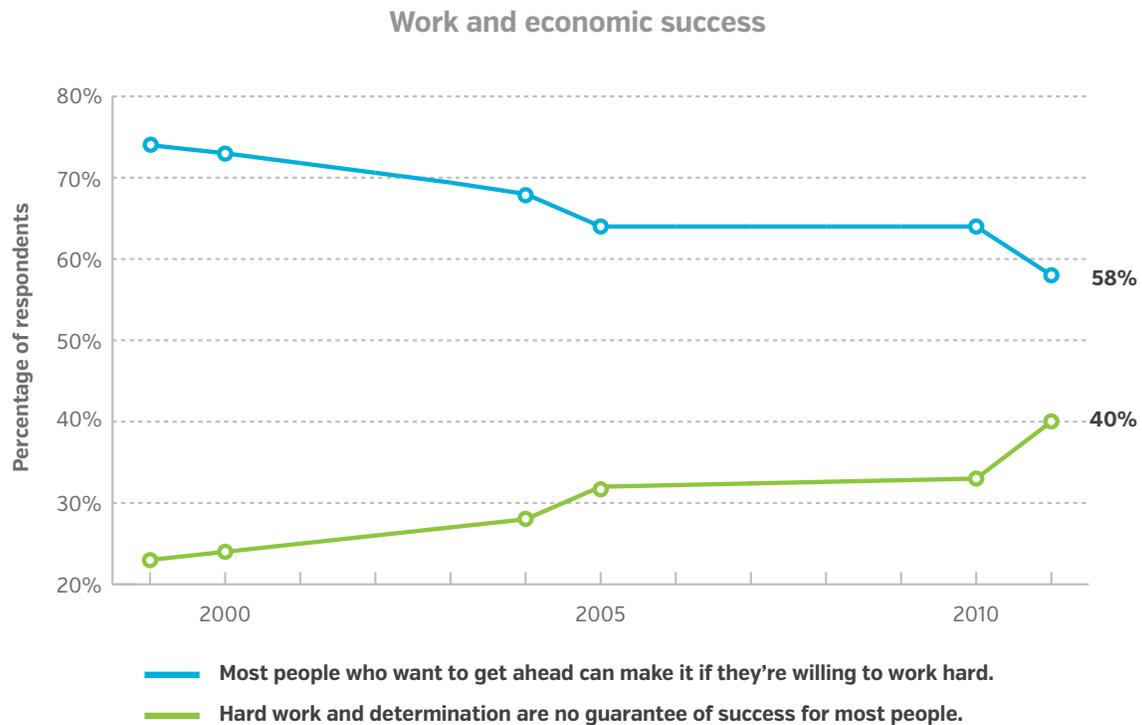


Figure 6. Question from Pew Research Center for the People & the Press Political Survey (2011, 2010), News Interest Index Poll (2005), Political Typology Poll (2004), Campaign Typology Poll (2000), and Typology Survey (1999). The answer choice “neither” is not included in this chart. Data is available from Pew’s online “Question Search” feature: <http://www.people-press.org/question-search/>

However, there is danger in over-interpreting this trend. While support has diminished over time, 58% of Americans still believe that hard work is enough for most people to get ahead. *Inequality for All*'s portrayal of middle class families struggling despite hard work and visualizations of data that depicts stagnation in real middle class wages directly address these beliefs.

As a final interpretive note, public perceptions and beliefs are influenced by a wide range of economic, political, and social factors. It would be a mistake to simplistically attribute changes at the macro level to *Inequality for All*. Instead these broad indicators will be used

to develop research instruments to measure how film audiences differ from national populations. They also provide a longitudinal standard for designing surveys and tracking changes in language.

These data points intentionally address public *perceptions* of economic inequality rather than the actual distributions of income in American society. This is because the film acts directly on these perceptions and beliefs. Further impact measurement will focus on campaign activities to understand their direct effects on the attitudes and behaviors of participants. Longer-term studies can explore the extent to which changes in perceptions of economic equality lead to changes in these underlying economic conditions.

Further references

Pew reports

The Pew Research Center conducts frequent polls of American public opinion. The following three reports address economic inequality in more depth:

- 1 “The Lost Decade of the Middle Class: Fewer, Poorer, Gloomier,” *Pew Social and Demographic Trends*, August 22, 2012, <http://www.pewsocialtrends.org/2012/08/22/the-lost-decade-of-the-middle-class/>.
- 2 Rich Morin, “Rising Share of Americans See Conflict Between Rich and Poor,” *Pew Social and Demographic Trends*, January 11, 2012, <http://www.pewsocialtrends.org/2012/01/11/rising-share-of-americans-see-conflict-between-rich-and-poor/>.
- 3 “Frustration with Congress Could Hurt Republican Incumbents: GOP Base Critical of Party’s Washington Leadership,” *Pew Center for the People & the Press*, December 15, 2011, <http://www.people-press.org/2011/12/15/frustration-with-congress-could-hurt-republican-incumbents/>.

Academic research

There is a large volume of academic research on the issue of economic inequality, including a substantial amount conducted by the leading character in *Inequality for All*, Robert Reich. Northwestern University sociologist Leslie McCall has written about the narrower subject of why Americans hold certain beliefs about economic inequality.

- 4 Leslie McCall, *The Undeserving Rich: American Beliefs about Inequality, Opportunity, and Redistribution*. New York: Cambridge University Press, 2013.

Social media

Online social networks offer the opportunity to measure changes in both the volume and sentiment of conversations on economic inequality. Although conversations on social media, unlike public opinion polls, are not representative of the larger American population, they provide near real-time feedback on the film and campaign. HI will use Crimson Hexagon's ForSight™ platform to track conversation about the film as well as key terms in the larger public discourse on economic inequality. Selected terms include:

“Inequality for All”

Used to directly track discourse about the film.

- Volume: 5,882 posts (October 2010 - July 2013)
- Sentiment: 26% positive, 71% neutral, and 3% negative (categorized by Crimson Hexagon's algorithm) ¹
- Geography: 1,481 posts contained location data. Of these, the top two states were California with 997 posts and New York with 224.
- Notable spikes in volume: Early conversation about the film peaked following its appearance at the Sundance Film Festival in January, 2013.

“Middle-out economics”

This frame offers an opposition to “trickle-down economics,” and is used during *Inequality for All*, especially by Nick Hanauer, the entrepreneur profiled in the film. As this idea diffuses in public discourse, it will be important to measure its appearance in conjunction with mentions of *Inequality for All*.

- Volume: 1,701 posts (October 2010 - July 2013)

¹ For more information on Crimson Hexagon's classification methods see: “Our Quantitative Analysis,” Crimson Hexagon, accessed July 30, 2013, <http://www.crimsonhexagon.com/quantitative-analysis/>.

- Sentiment: 5% positive, 87% neutral, and 7% negative (categorized by Crimson Hexagon’s algorithm)
- Notable spikes in volume: On July 23, 2013 Nick Hanauer and Eric Liu published an article on the website of *The Atlantic* titled, “‘Middle-Out’ Economics: Why the Right’s Supply-Side Dogma Is Wrong.” On July 24, 2013 President Obama delivered a speech on the economy at Knox University in Illinois, in which he promoted “an economy that grows from the middle out, not the top down.”²

“Income gap”

This frame relates more broadly to the issue of income inequality. Measuring these conversations will provide information about the wider contours of this discourse. It can also be cross-referenced with conversations that explicitly mention *Inequality for All*.

- Volume: 108,502 posts (October 2010 - July 2013)
- Sentiment: 6% positive, 84% neutral, and 11% negative (categorized by Crimson Hexagon’s algorithm)
- Geography: 18,365 posts contained location data. Of these, the top state was California, with 2,827 posts.
- Notable spikes in volume: There was a noticeable increase in conversation in early December, 2011 following the release of Census results that demonstrated growing income inequality in the United States. A smaller spike occurred in late January 2011, following President Obama’s State of the Union address.

HI will continue to monitor social media conversations throughout *Inequality for All*’s theatrical release and outreach campaign to measure changes in discourse against these baselines. Other terms include: “flat wages,” “middle class,” “job creators,” “income inequality,” “Robert Reich,” and “Nick Hanauer.” Additional frames and issues can be added to HI’s current list throughout the campaign.

² “Obama’s Economics Speech at Knox College,” *The New York Times*, last modified July 24, 2013, <http://www.nytimes.com/2013/07/25/us/politics/obamas-economics-speech-at-knox-college.html>.

Press

Press coverage reflects broader public sentiment about economic inequality. HI will track the frequency of key terms as they appear in the top ten papers in the United States by circulation. This provides an indicator of national press coverage, which often sets the agenda for political and public discourses.

The frequency counts in Figures 7 and 8 illustrate the volume of conversation about some of the issues covered in *Inequality for All*. Appearances of the term “middle class” greatly outnumber those on the issues of “income inequality” and “economic inequality.” This makes intuitive sense, as “middle class” can refer to a broader range of social issues. However, usage of all three terms has reached new levels in the past five years.

Frequency of key terms in the top ten US newspapers by circulation, 1996-2013

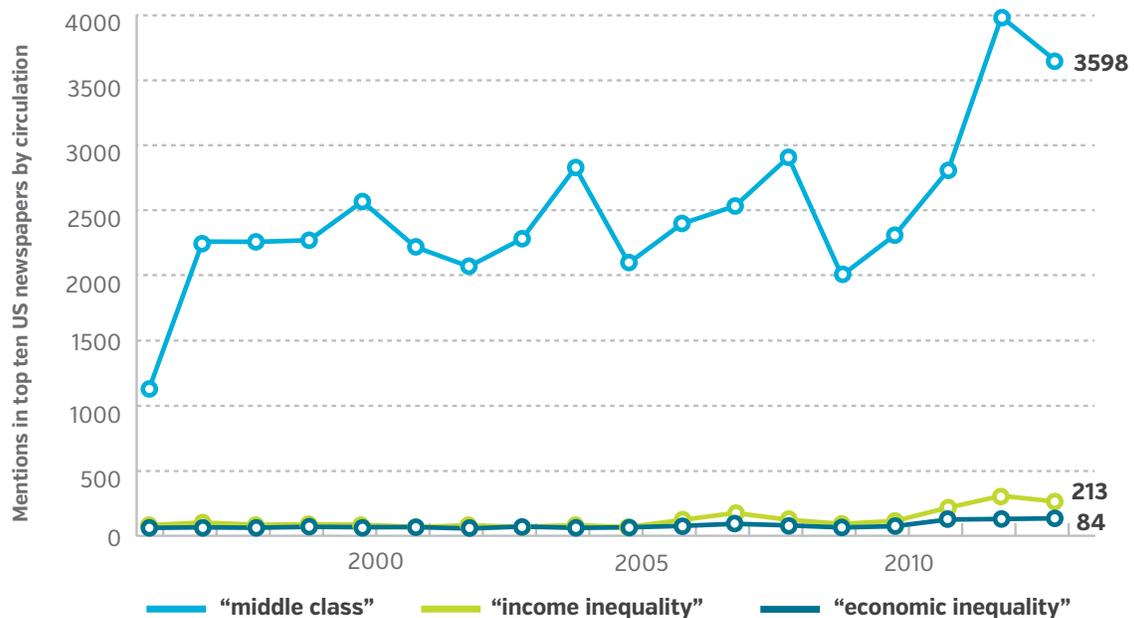


Figure 7. HI queried the ProQuest news database to count the frequency of these terms in the following papers: the *Washington Post*, *The New York Times*, the *Los Angeles Times*, the *Chicago Tribune*, the *Wall Street Journal*, the *New York Daily News*, the *New York Post*, *USA TODAY*, and the *Denver Post*.

And while results for the phrase “middle class” likely include irrelevant articles, variations in the frequency of the more targeted phrases of “economic inequality” and “income inequality” (Figure 8) address the core issues covered in *Inequality for All*.

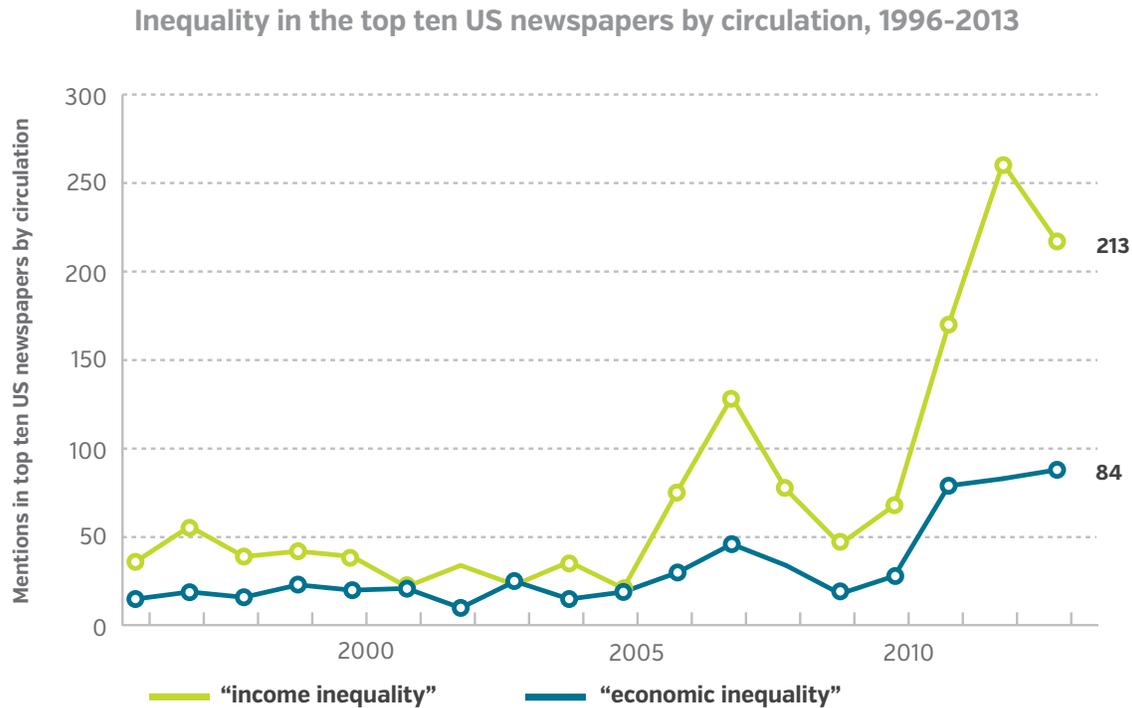


Figure 8. The above graph visualizes the same ProQuest query with the high-volume phrase “middle class” omitted.

Simply counting words doesn’t say much about the differing narratives in the press. Are they sympathetic to these issues or more dismissive? Even a cursory review of recent press coverage of the issue reveals a range of viewpoints. “The Great Divide” series ³ in *The New York Times*, moderated by Nobel prize-winning economist Joseph Stiglitz, documents the costs of inequality from both academic and personal perspectives. On the other hand, the *National Review* ⁴ criticizes middle-out economics. To characterize these views in a more systematic way, HI statistically extracted key phrases relating to these topics. HI extracted key phrases from the entire corpus of press articles (more than 40,000 articles) using a variation

³ Joseph E. Stiglitz, “The Great Divide” [blog], *The New York Times*, accessed July 30, 2013, <http://opinionator.blogs.nytimes.com/category/the-great-divide/>. ⁴ James Pethokoukis, “Fact-Free ‘Middle-Out Economics,’” *The National Review Online*, last modified July 29, 2013, <http://www.nationalreview.com/article/354626/fact-free-middle-out-economics-james-pethokoukis>.

of the TextRank algorithm,⁵ in which text is represented as a network of words with edges corresponding to word co-occurrences. This means that words that appear more often together will receive a higher ranking. Key words are the most central words in the network as determined by the structure of the network itself; key phrases are consecutive series of adjacent key words.

For “income inequality” many of these key phrases referred to its rising level (e.g., “rising income inequality,” “income divide,” “growing income gap”). Another group of phrases concentrated on tax issues (e.g., “federal income taxes,” “new tax revenue,” “tax code,” “corporate tax rates”). A third, more diffuse group of phrases referred to newsworthy events (e.g., “Obama re-election campaign” and “Occupy New York”). So while individual authors and publications may address these issues according to their own values, the press as a whole appears to recognize increasing levels of inequality and its relationship with social movements (Occupy) and political processes (Obama’s reelection).

Along with tracking changes in frequency, later impact measurement will monitor press coverage of the film itself. Extraction of key phrases from press coverage of *Inequality for All*’s release and campaign can reveal specific messages and characters that resonate with the press and thus gain exposure among the larger public. Comparing film and campaign coverage with broader press narratives on inequality will help measure the extent to which *Inequality for All* shifted conversations on the issue.

⁵ Mihalcea, Rada, and Paul Tarau. “TextRank: Bringing order into texts.” In *Proceedings of EMNLP*, vol. 4, no. 4. 2004.

The Congressional Record

In addition to using the press and social media to gauge national discourse, HI tracked the usage of key frames from *Inequality for All* in Congress. These measurements describe the national legislative contexts in which policies relating to inequality are debated and enacted. Although mentions of issues in Congress do not necessarily equate to the passage of legislation, there has been some growth in discussion of inequality issues. As with press coverage, usage of the more generic phrase “middle class” (929 mentions in 2012) dwarfed that of both “income inequality” and “economic inequality” (19 mentions and 2 mentions, respectively, in 2012).

Frequency of key terms in the Congressional Record, 1996-2013

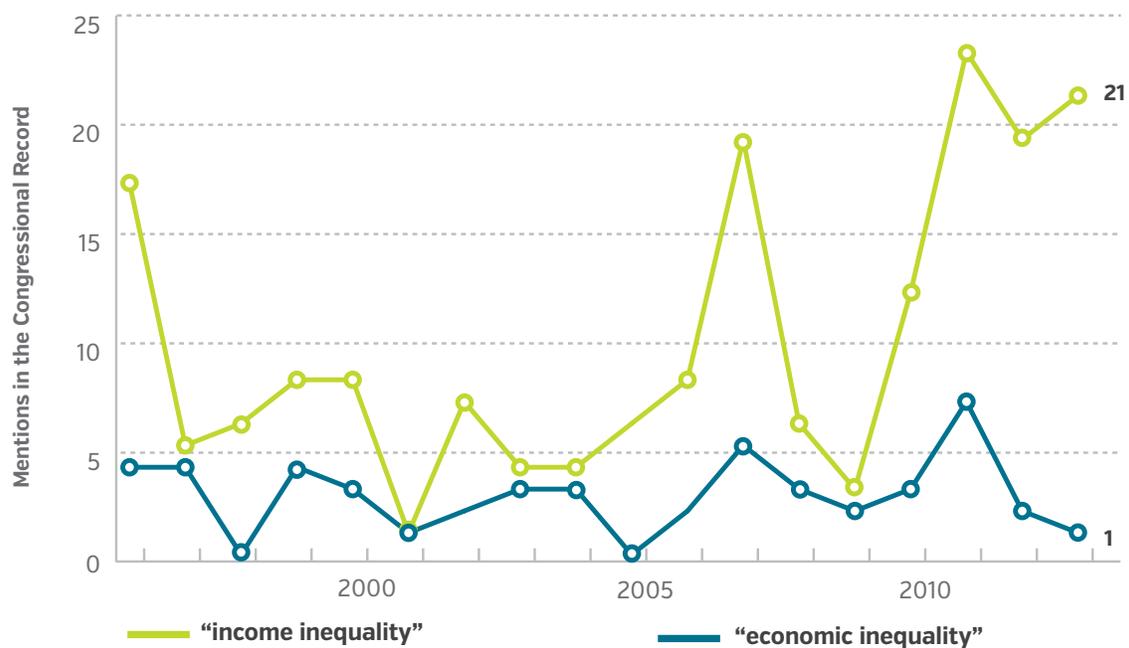


Figure 9. HI queried the records of both the Senate and the House of Representatives for the phrases “middle class,” “income inequality,” and “economic inequality” using the Sunlight Foundation’s Capitol Words API. More information and API documentation for this service is available at: <http://sunlightlabs.github.io/Capitol-Words/>.

Analyzing the results by party reveals that “income inequality” seems to be almost an exclusively Democratic concern, at least in the Congressional Record. Since 1996 the topic of “income inequality” has been brought up 136 times by Democrats, 15 times by Republicans, and 10 times by independents.

Figure 10 lists senators in order of their usage of the term “income inequality” in the Congressional Record. Again, Democrats are overrepresented. Individuals on this list may be more amenable to special screening efforts or using the film as a platform to inspire legislation.

Mentions of “income inequality” in the Congressional Record, 1996-2013

Name	Issue mentions	State	Party
Bernard Sanders	10	Vermont	Independent
Kent Conrad	8	North Dakota	Democrat
Barbara Lee	8	California	Democrat
Martin Sabo	5	Minnesota	Democrat
Lee Hamilton	5	Indiana	Democrat
Barney Frank	5	Massachusetts	Democrat
Sherrod Brown	4	Ohio	Democrat
Sander Levin	4	Michigan	Democrat
Michael Bennet	4	Colorado	Democrat
Keith Ellison	4	Minnesota	Democrat
Jan Schakowsky	4	Illinois	Democrat
Jack Reed	4	Rhode Island	Democrat
Harry Reid	4	Nevada	Democrat
Dianne Feinstein	4	California	Democrat
Carl Levin	4	Michigan	Democrat

Figure 10. Party affiliation from the CapitolWords API.

Compared with “income inequality,” the phrase “middle class” is used much more frequently in the Congressional Record—6,748 times by Democrats and 2,647 times by Republicans. This ratio, while still unbalanced, suggests that framing the film in terms of middle class concerns may appeal to viewers of differing political persuasions. Future research should continue to track this issue in the Congressional Record along with pro-equality legislation at both the national and state levels. *Inequality for All*’s planned tour of state capitols will provide further opportunities to measure the film’s impact on policy makers and legislators.

Conclusions

Inequality for All has the potential to shift discourses on economic inequality in the United States. HI will continue to monitor these impacts by tracking public opinion, social media, press coverage, and legislative data throughout the film's release and campaign.

How might this change occur? The baseline data provide some clues. Although the partisan nature of this issue (and American society more generally) makes it likely that not everyone will agree; public opinion shows that a majority of Americans believe that income differences in America are too large. An ideal situation would be for *Inequality for All* to empower this majority by providing them with vocabularies and conceptual tools for understanding inequality and communicating it to others. Through its partnerships, the film can promote sustained social and political engagement among its viewers and build capacity for longer term efforts to change policies and legislation to reduce inequality. Careful measurement and strategic adjustment of these activities will play an important role in the realization of these social change objectives.

This report provides macro-level measurement for perceptions of and discourses on inequality in the United States. These baselines should be compared with targeted measurements of campaign activities and the viewer survey, which are detailed in the attachments to this report. Because economic inequality is such a complex, systemic issue, it is important to avoid broad causal inferences about the effects of *Inequality for All*. There are simply too many factors, both economic and cultural, that can affect this issue. This said, careful observation and measurement will help the filmmakers and outreach team move strategically toward their social change goals.

About the Harmony Institute

The Harmony Institute (HI) is an interdisciplinary research center that studies the impact of entertainment. HI's work ranges from applied media research to university partnerships on studies exploring fundamental questions around the nature of audience engagement and societal impact.

HI was founded by John S. Johnson (BuzzFeed, EYEBEAM, and Johnson Research Labs) in 2008. After years in the film industry, Johnson recognized the need to better understand entertainment's impact on audiences. HI was formed out of a desire to see entertainment meet the pressing needs of society, and to build a bridge between the worlds of mass media and science.

HI has evaluated projects ranging from social issue documentaries to fictional TV movies and multi-platform campaigns, and has conducted research on behalf of The Ford Foundation, MTV, DARPA, and Free Press, among others. Media coverage of HI's work includes profiles in *Science*, *The New York Times*, *Fast Company*, *GOOD*, and others.

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