

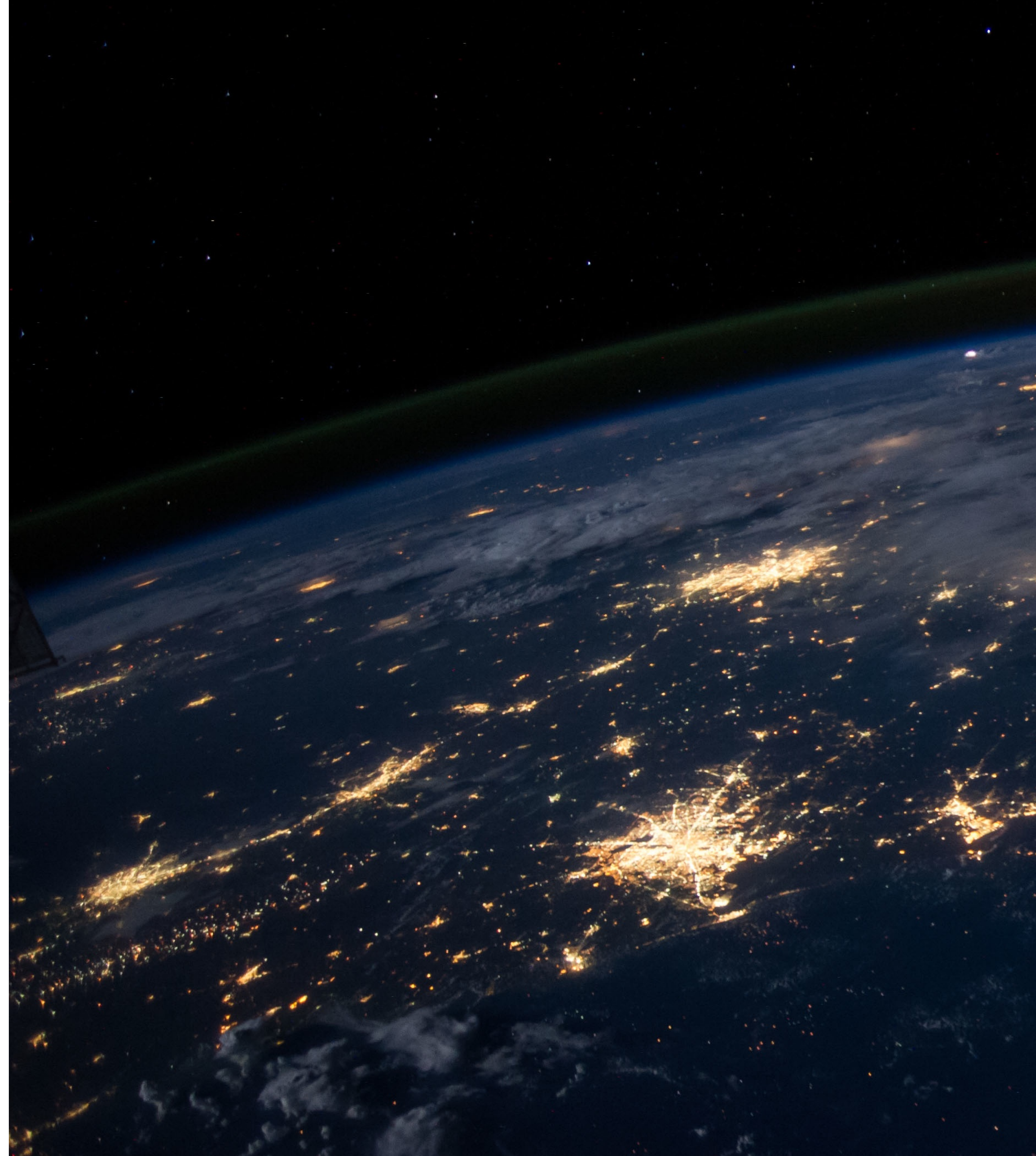


The Four Quadrants Of American Voters

Verified Voter Omnibus Survey

N=1,001 Registered Voters

June 18 - June 22, 2021



Cultural Issues

Voters were asked if they agreed more with the more liberal or more conservative stance on a variety of cultural issues.

Liberal		Conservative		
Abortion should be legal in all or most circumstances	56%	↔	34%	Abortion should be illegal in all or most circumstances
America is not the greatest country in the world	29%	↔	62%	America is the greatest country in the world
It is more important to control gun ownership	51%	↔	42%	It is more important to protect the right of Americans to own guns
The government should deal with illegal immigration by making it easier to immigrate to the US legally	38%	↔	53%	The government should deal with illegal immigration by increasing border security and enforcement
Transgender athletes should be able to play on sports teams that match their current gender identity	29%	↔	56%	Transgender athletes should only be allowed to play on sports teams that match their birth gender
The government should prevent people from engaging in hate speech against certain groups in public	43%	↔	48%	People should be allowed to express unpopular opinions in public, even those that are deeply offensive to other people
Racism is built into our society, including into its policies and institutions	40%	↔	50%	Racism comes from individuals who hold racist views, not from our society and institutions
We need to reallocate funding from police departments to social services	35%	↔	56%	We need to fully fund the budget for police departments
There are still significant obstacles that make it harder for women to get ahead than men	54%	↔	38%	The obstacles that once made it harder for women than men to get ahead are now gone
Gay and lesbian couples should be allowed to marry legally	62%	↔	28%	Gay and lesbian couples should not be allowed to marry legally

Note: Unsure not shown

Economic Issues

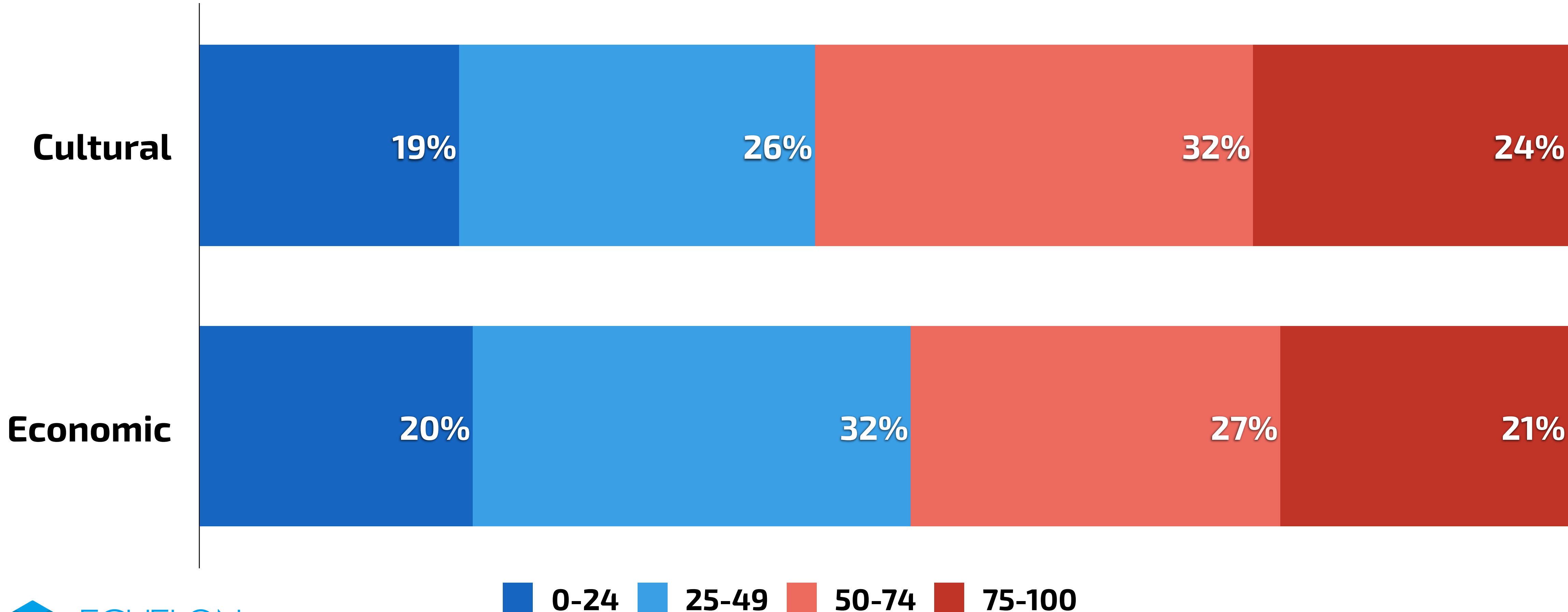
Voters were asked if they agreed more with the more liberal or more conservative stance on a variety of economic issues.

Liberal			Conservative	
Hard work and determination are no guarantee of success for most people	38%	↔	57%	Most people who want to get ahead can make it if they're willing to work hard
I would rather have a bigger government providing more services	41%	↔	45%	I would rather have a smaller government providing fewer services
The fact that some people in the U.S. are rich and others are poor is a problem that needs to be fixed	41%	↔	51%	The fact that some people in the U.S. are rich and others are poor is an acceptable part of our economic system
Government regulation of business is necessary to protect the public interest	48%	↔	39%	Government regulation of business usually does more harm than good
The federal minimum wage must be increased to \$15 an hour	49%	↔	42%	The federal minimum wage should not be increased to \$15 an hour
Free trade agreements have generally hurt the United States	28%	↔	42%	Free trade agreements have generally helped the United States
We should raise taxes in order to ensure Social Security and Medicare's long-term future	49%	↔	33%	We should curb benefits in order to ensure Social Security and Medicare's long-term future
It is the responsibility of the federal government to see to it that everyone has health care coverage	52%	↔	39%	It is not the responsibility of the federal government to see to it that everyone has health care coverage
Stricter environmental laws and regulations are worth the cost	51%	↔	37%	Stricter environmental laws and regulations cost too many jobs and hurt the economy
We should raise taxes on people making more than \$200,000 a year	60%	↔	30%	We should not raise taxes on people making more than \$200,000 a year

Note: Unsure not shown

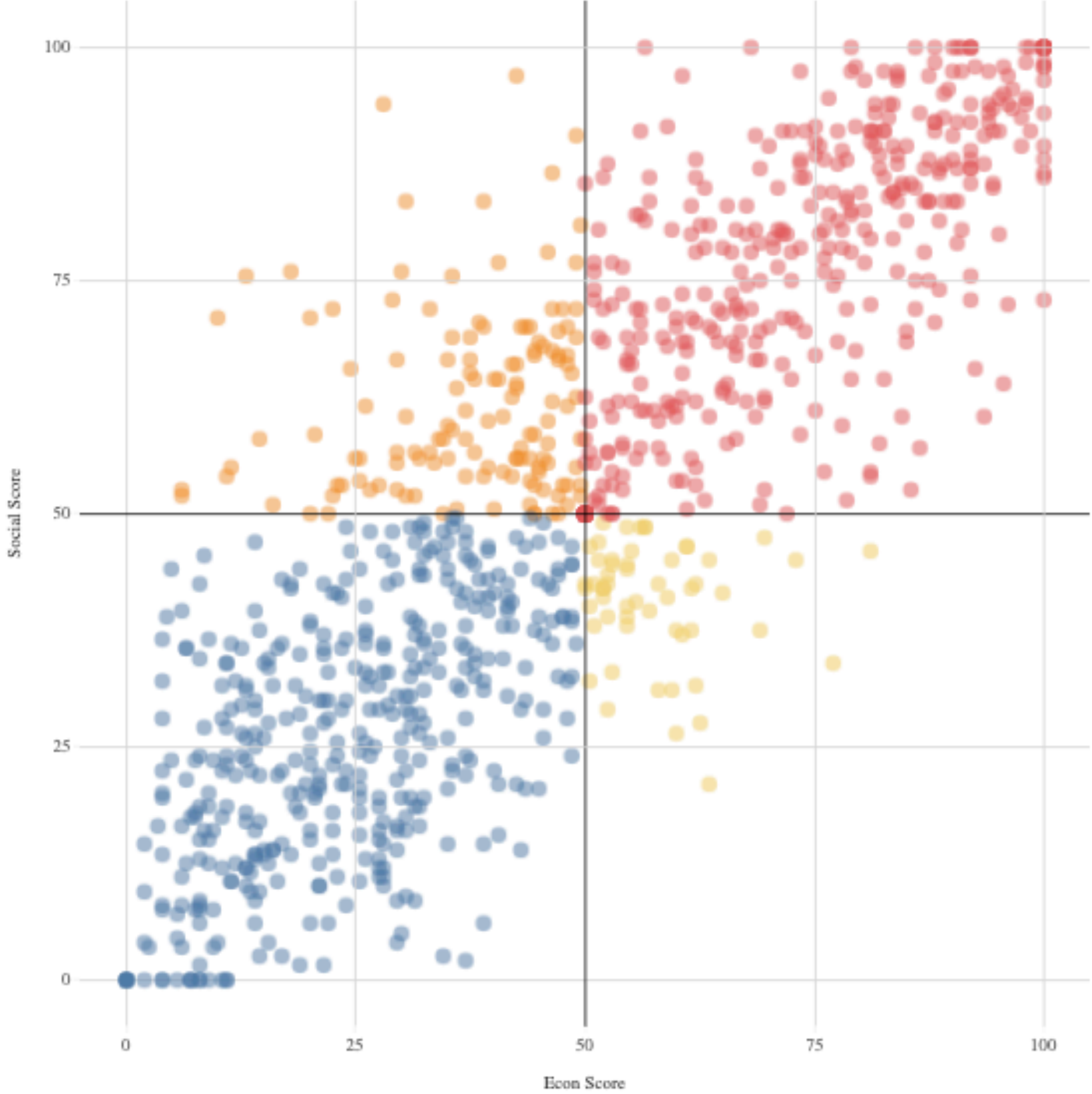
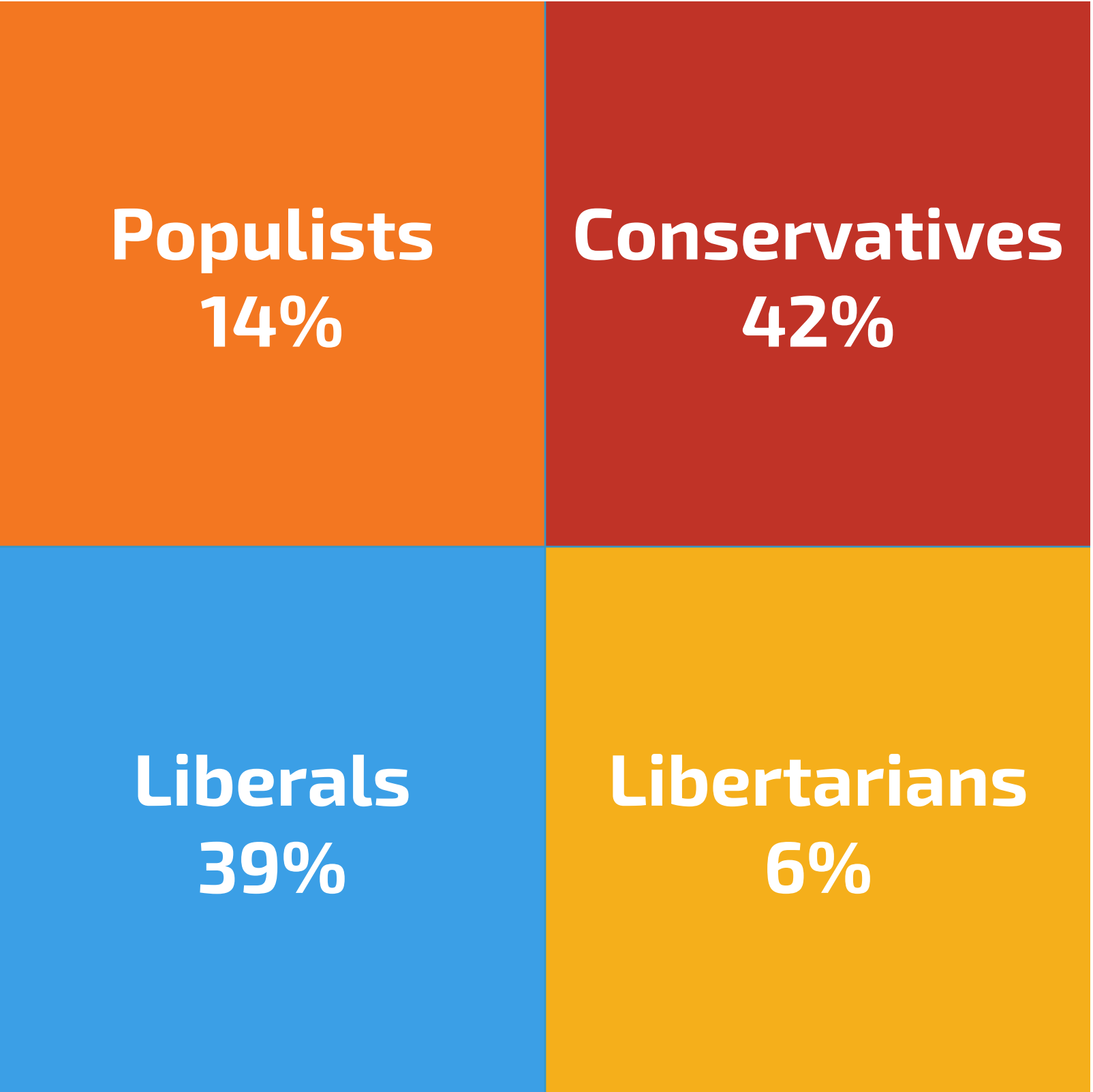


Cultural Conservatives Outnumber Cultural Liberals 56-44, Economic Liberals Outnumber Economic Conservatives 52-48

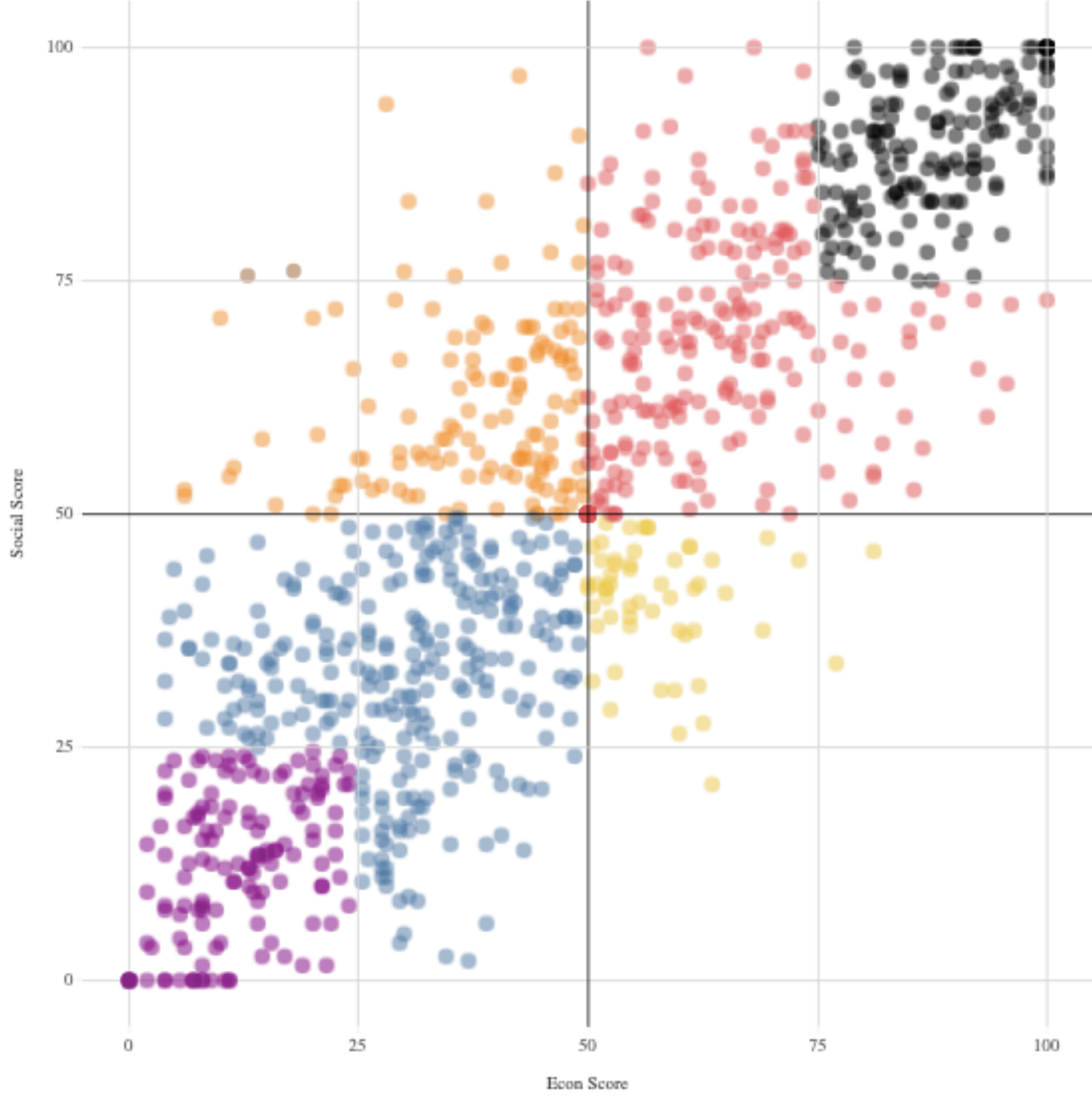
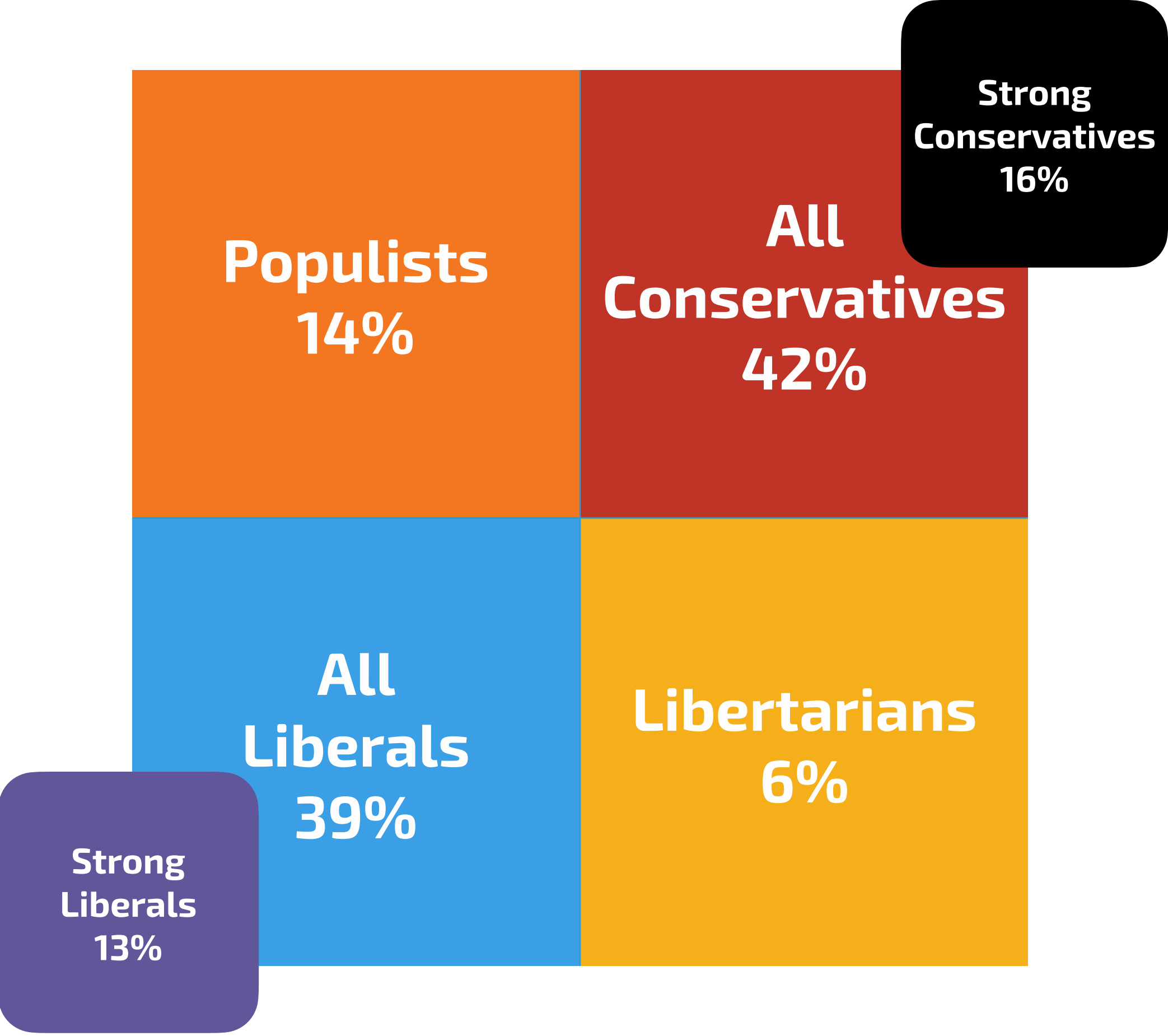


Note: Scores under 50 are liberal, scores 50 and over are conservative

Culturally Conservative and Economically Liberal Voters Are 14% Of Electorate

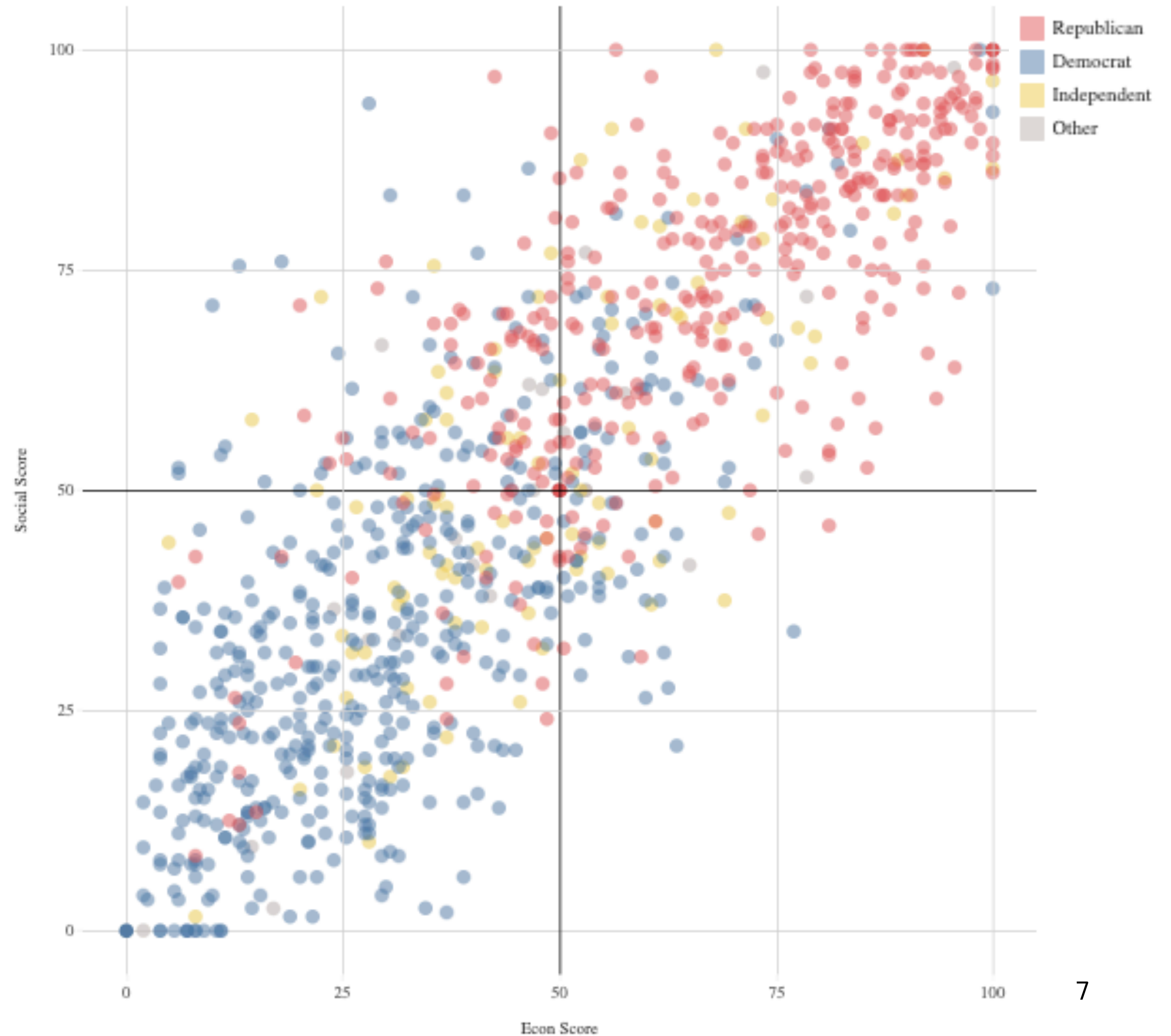


Strong Conservatives, Strong Liberals Hold Roughly Same Share Of Electorate As Populists

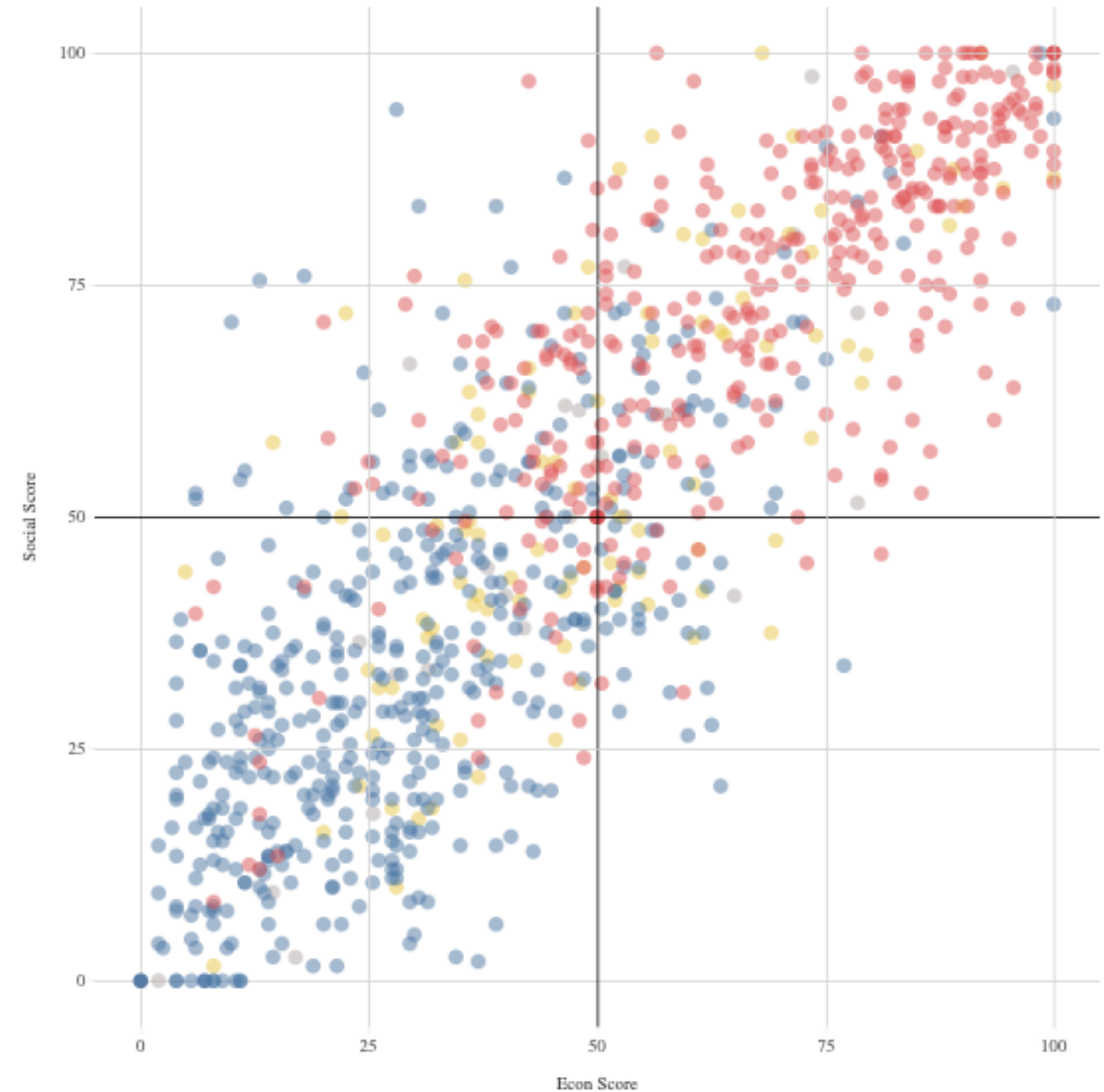
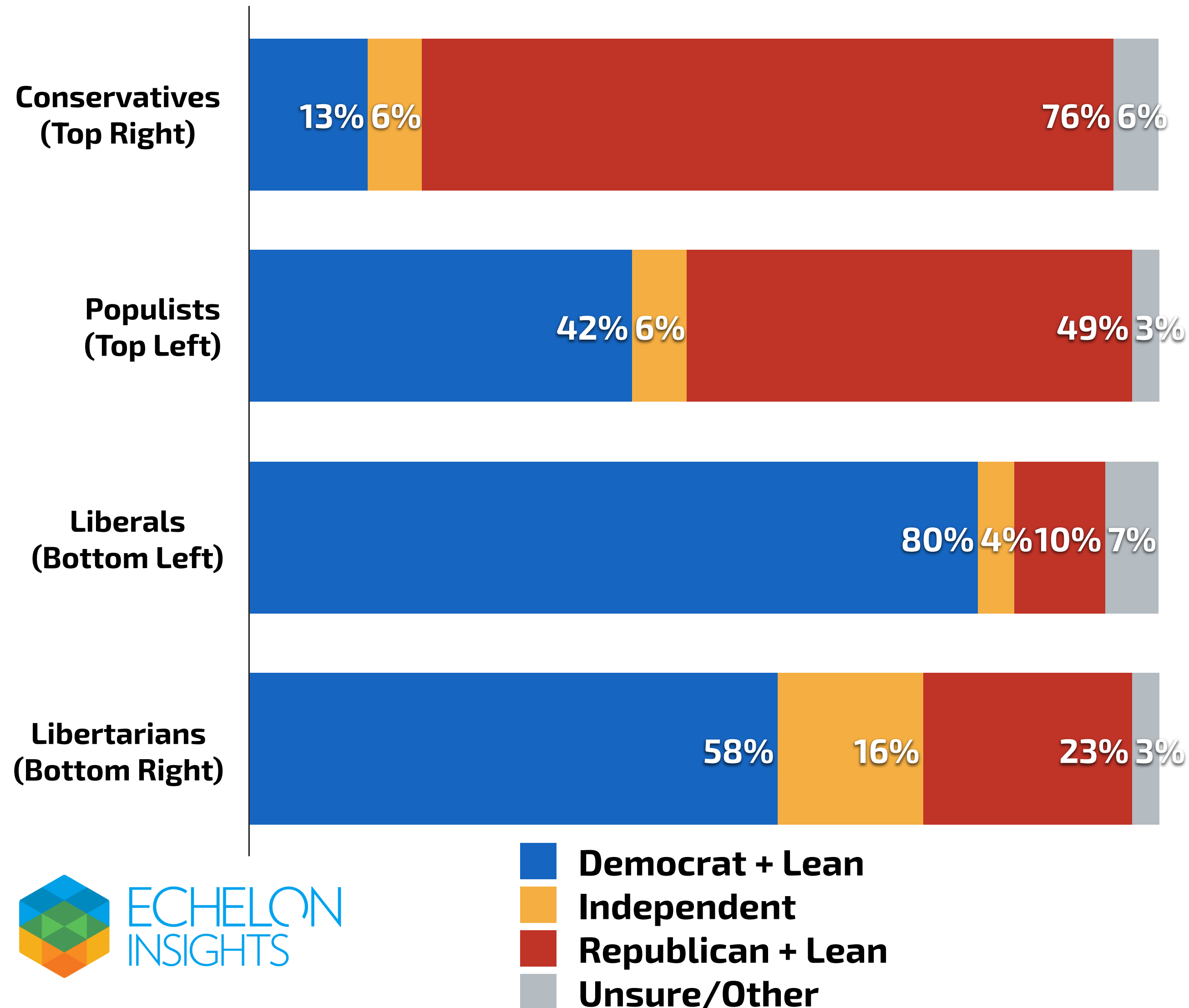


Party Identification

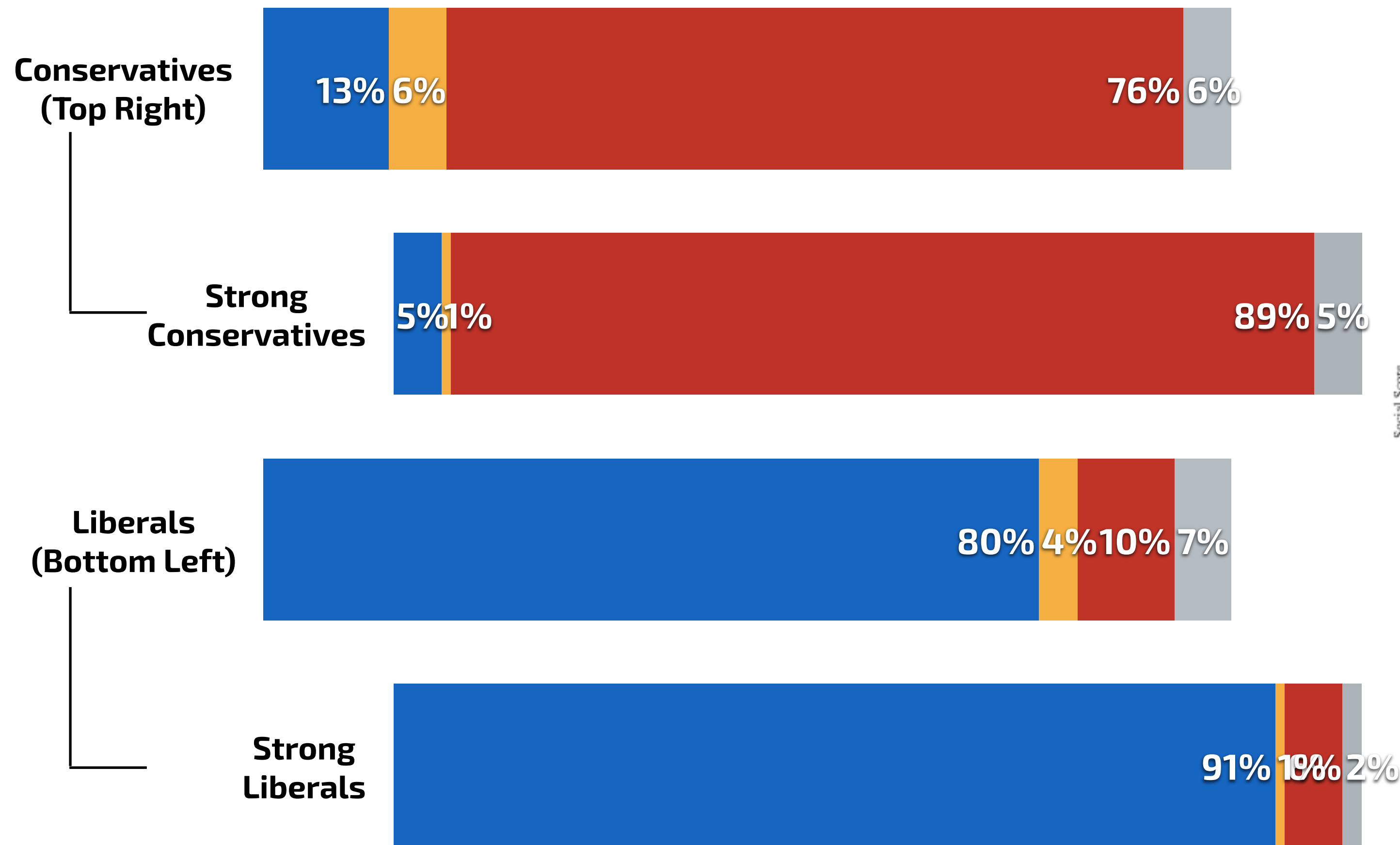
- Both the Conservative and Liberal quadrants are heavily partisan with 76% and 80% of voters identifying as Republican and Democrat, respectively.
- The Libertarian quadrant is composed of mostly Democrats, while the Populist group is split across party lines.



Populist Quadrant Is Swing-Voter Battleground; 6 in 10 Libertarians Are Democrats



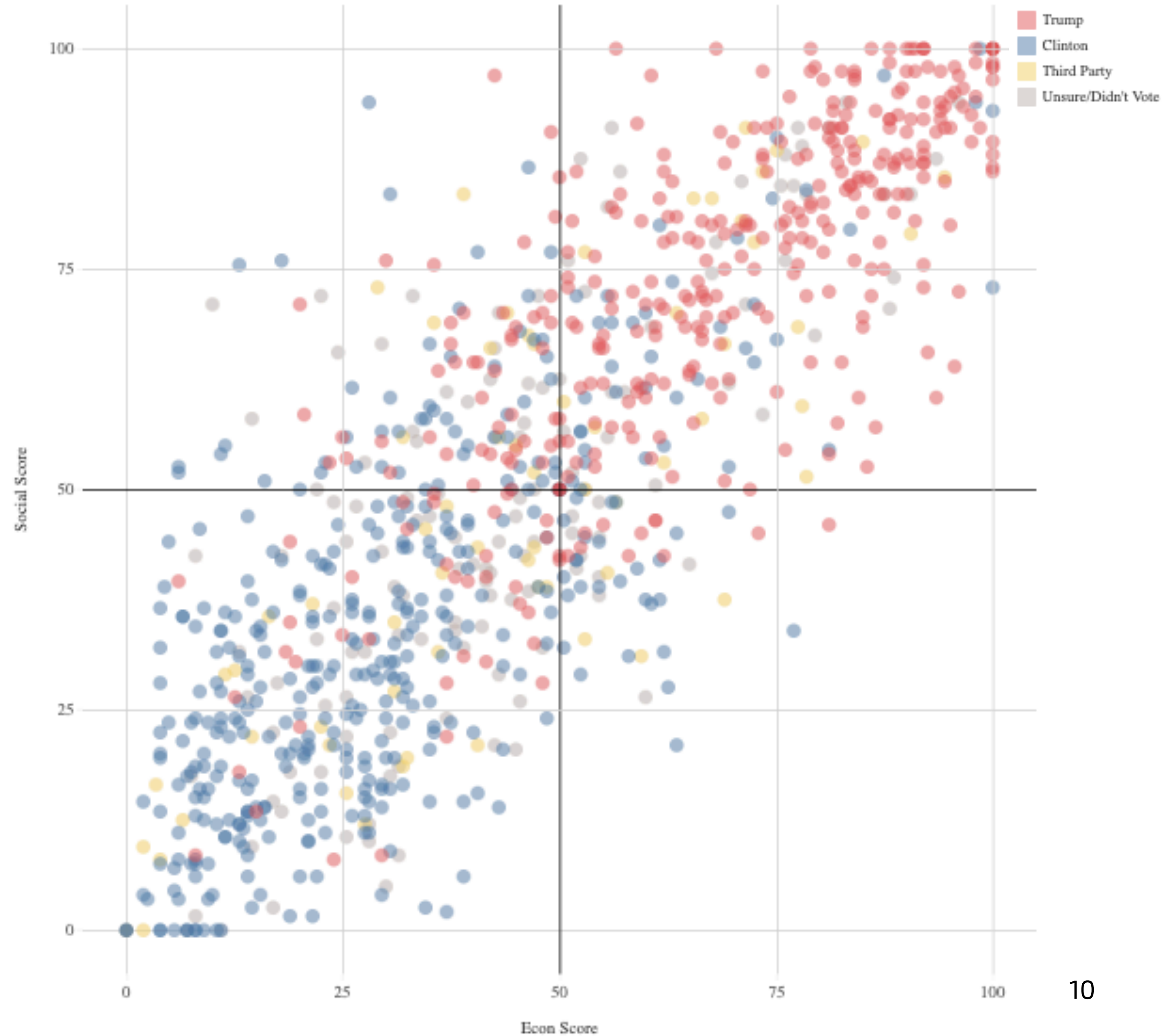
Strong Liberals, Strong Conservatives Almost Entirely Polarized



- Democrat + Lean
- Independent
- Republican + Lean
- Unsure/Other

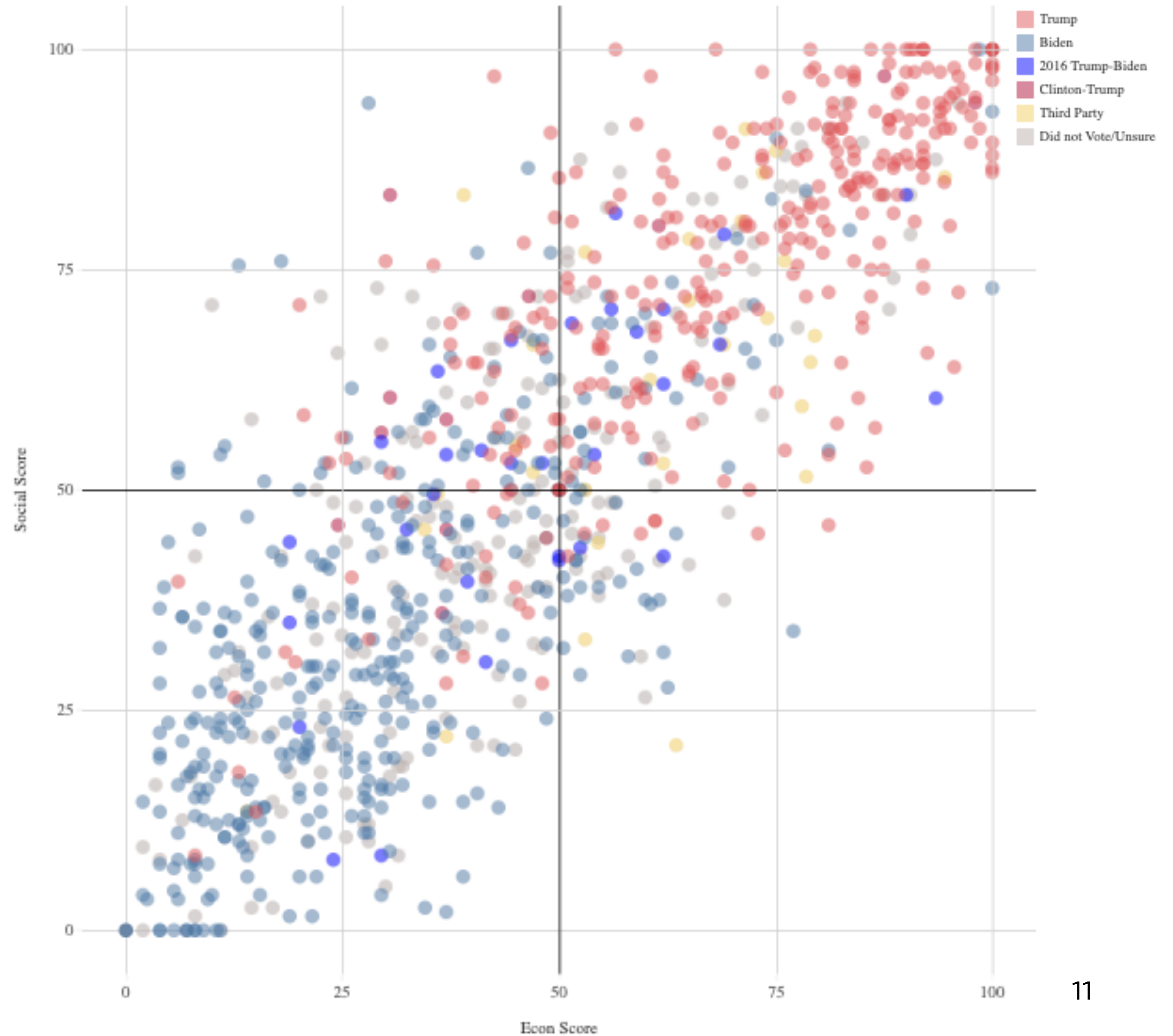
2016 Presidential Election

- Clinton won Populists in 2016, though her support was weaker among Liberals compared to Biden in 2020.

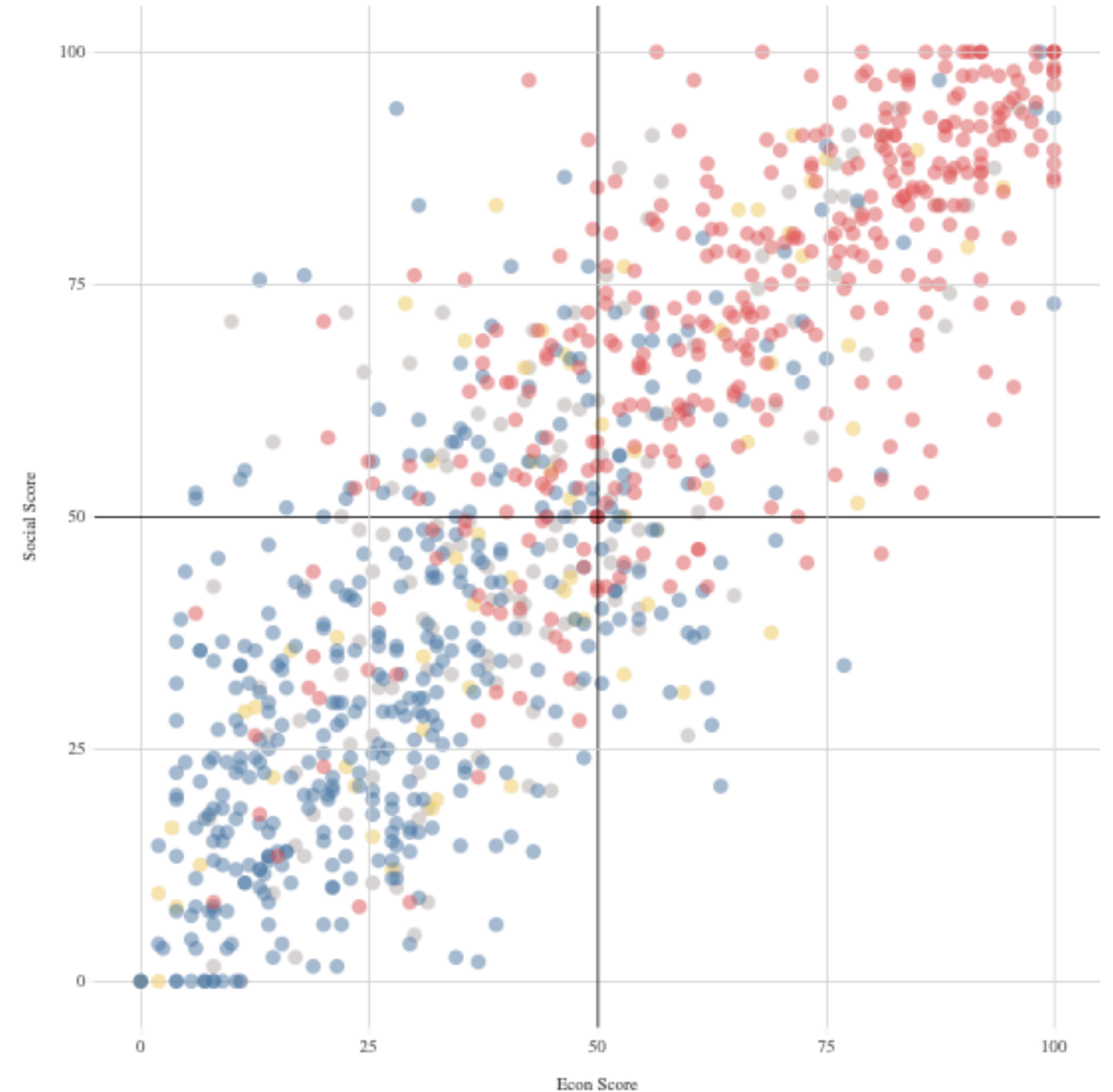
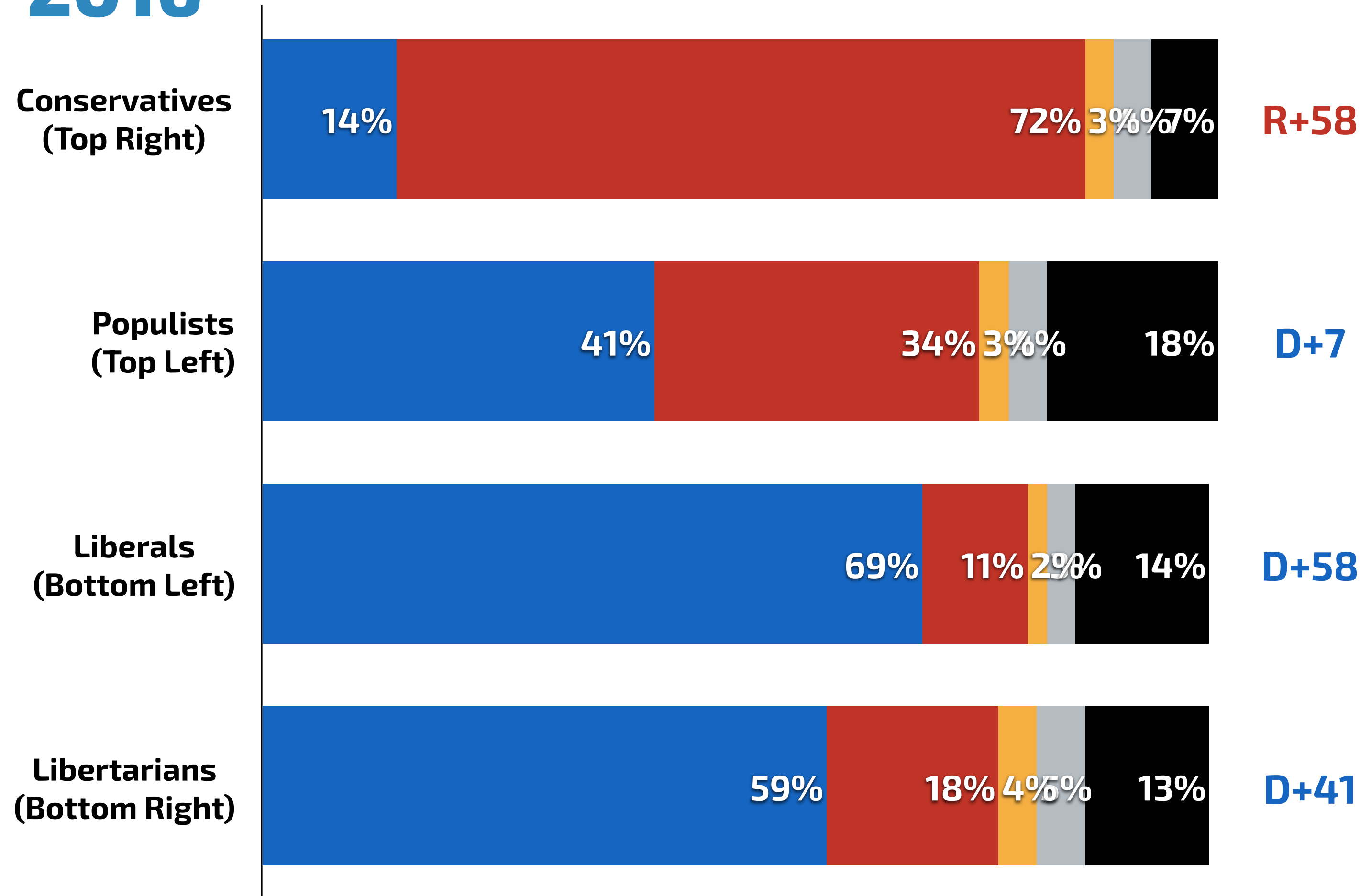


2020 Presidential Election

- Biden offset Trump's Populist gains by shoring up support among Liberal and Libertarian quadrants.

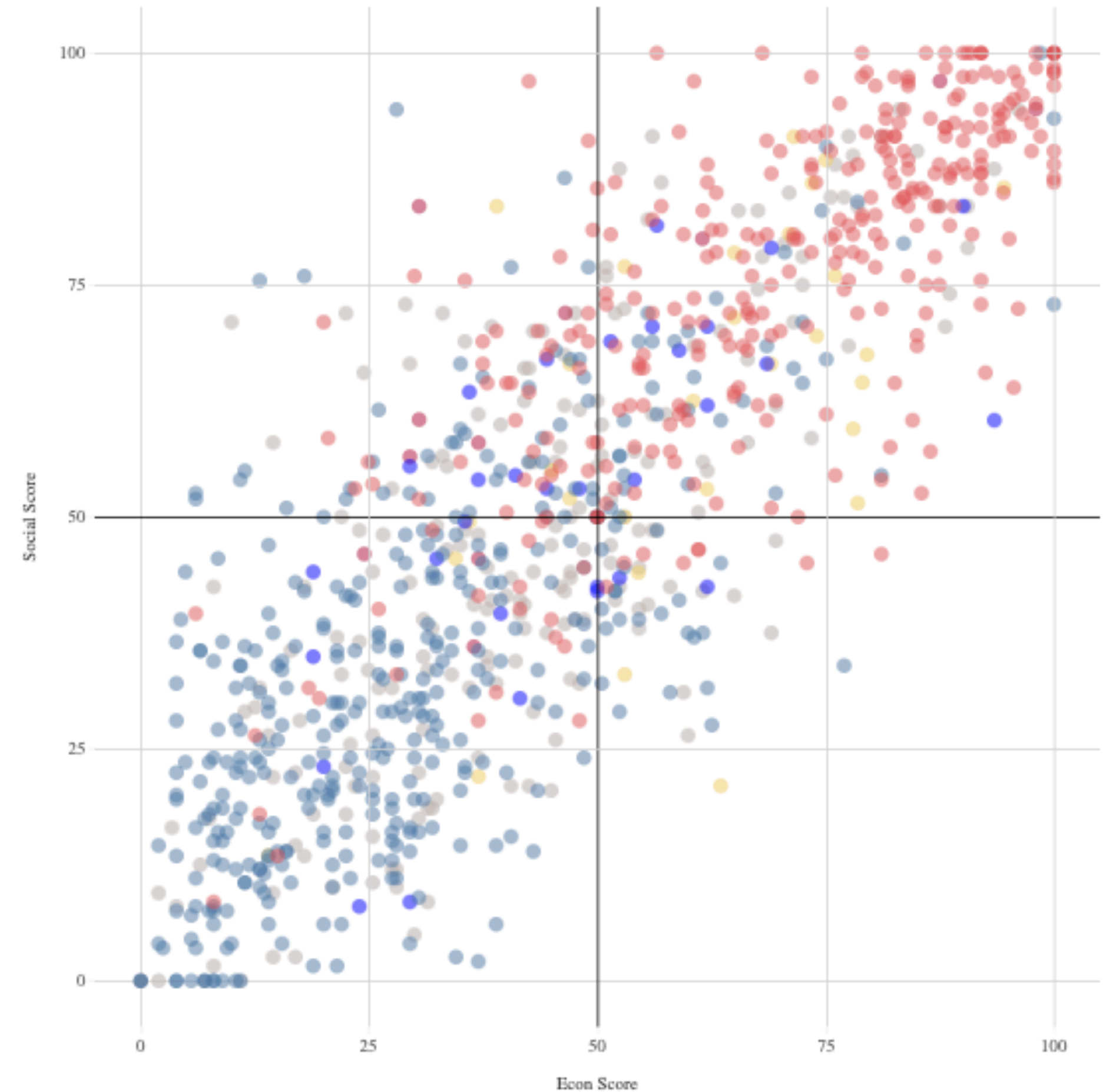
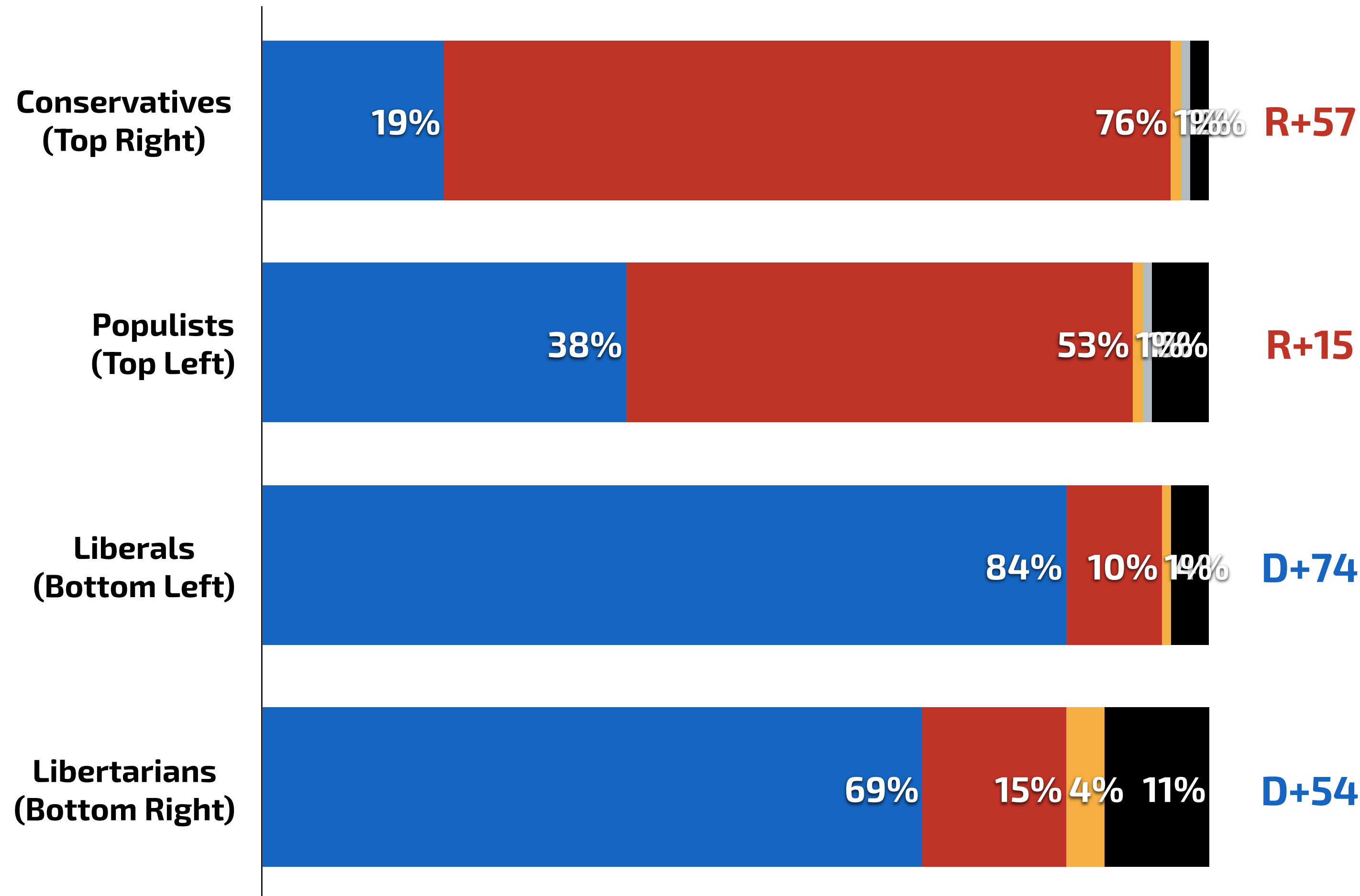


Clinton Won Populists; 14% Of 2020 Liberals Did Not Vote In 2016



- Clinton
- Trump
- Johnson
- Other/Unsure
- Did not vote

Trump Gained Among Populists; Biden Mobilized Liberals



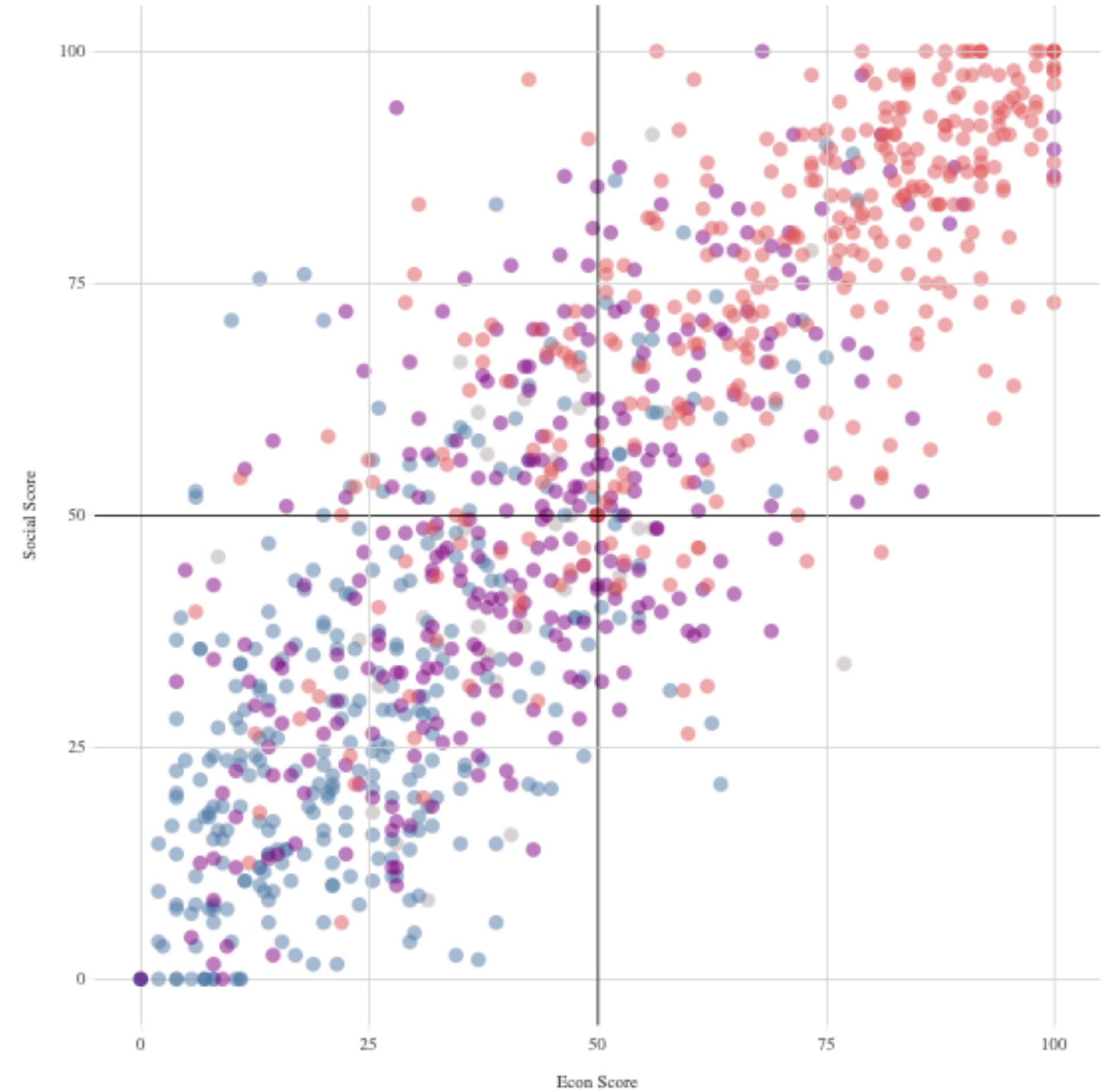
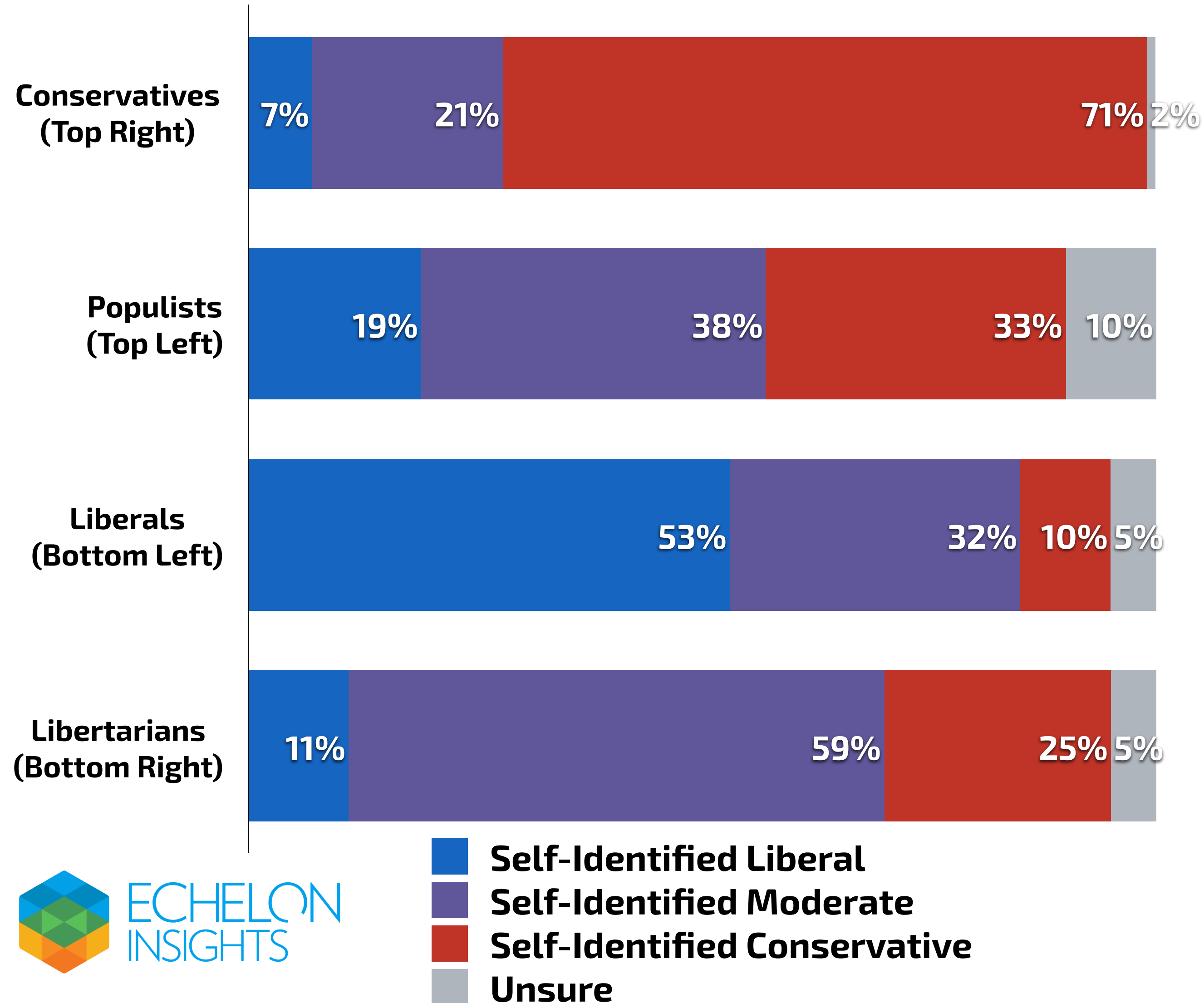
- Biden
- Trump
- Jorgensen
- Other/Unsure
- Did Not Vote

Political Ideology

- Conservative quadrant overwhelmingly self-identifies as ideologically conservative while one third of Liberals and a majority of Libertarians identify as moderate.
- Around 1 in 5 Strong Liberals self-identify as ideologically moderate.



Plurality Of Populists Identify As Ideologically Moderate



1 in 5 Strong Liberals Identify As Ideologically Moderate

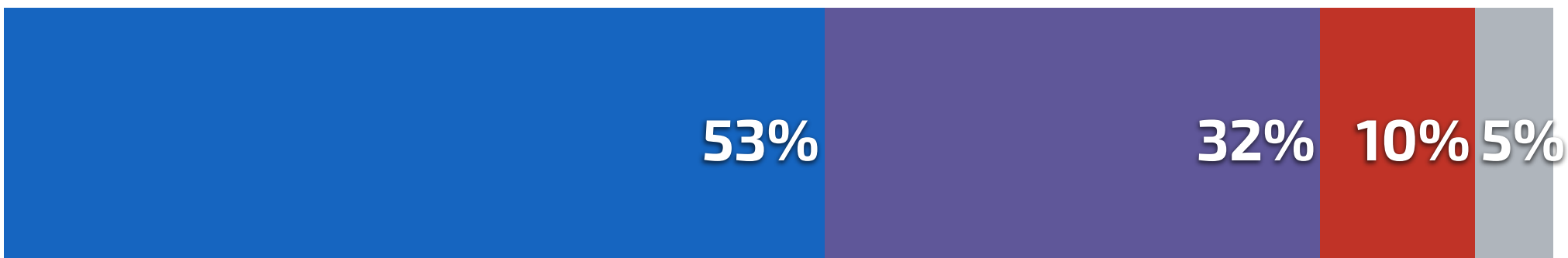
Conservatives
(Top Right)



Strong
Conservatives



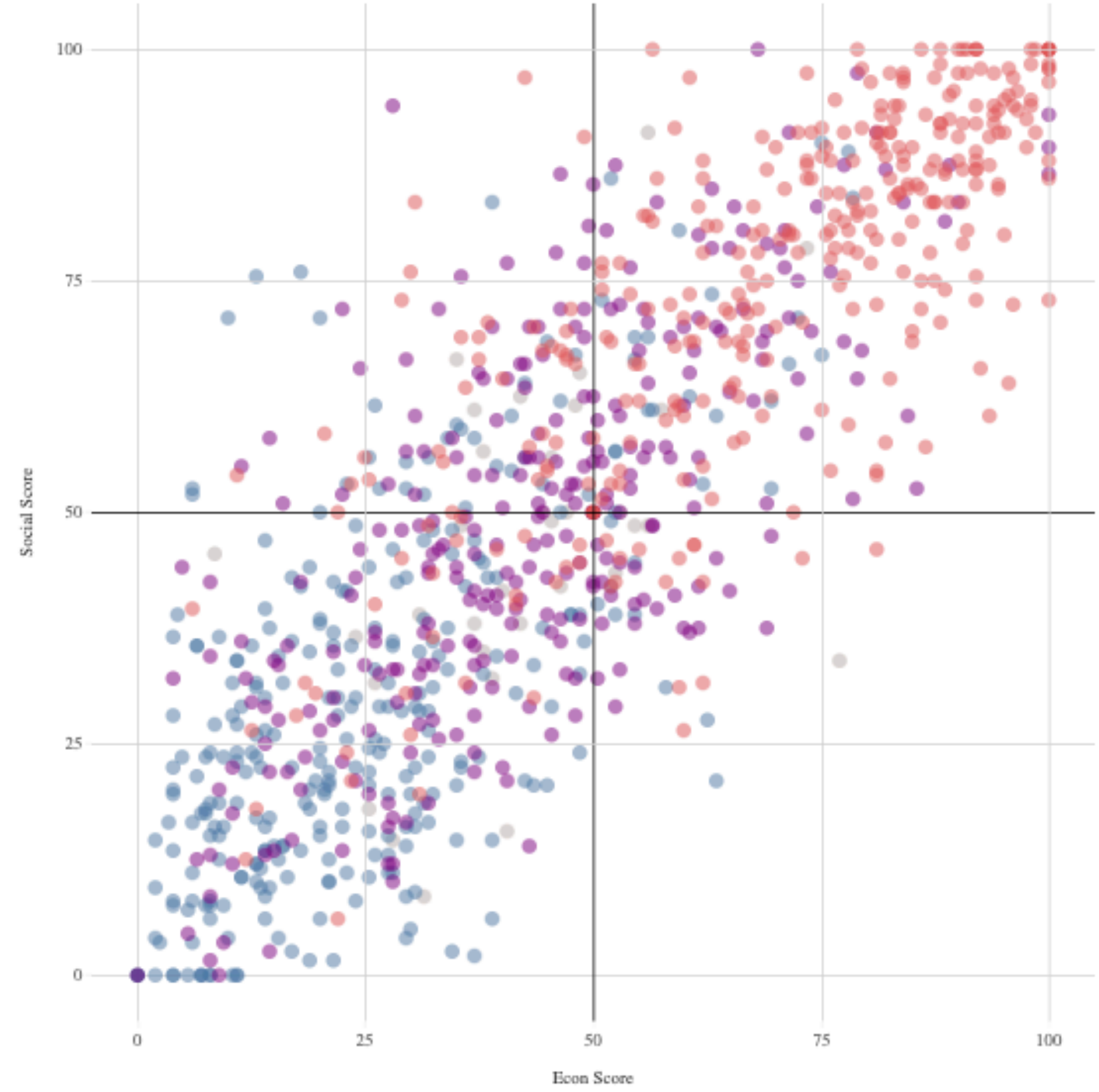
Liberals
(Bottom Left)



Strong
Liberals

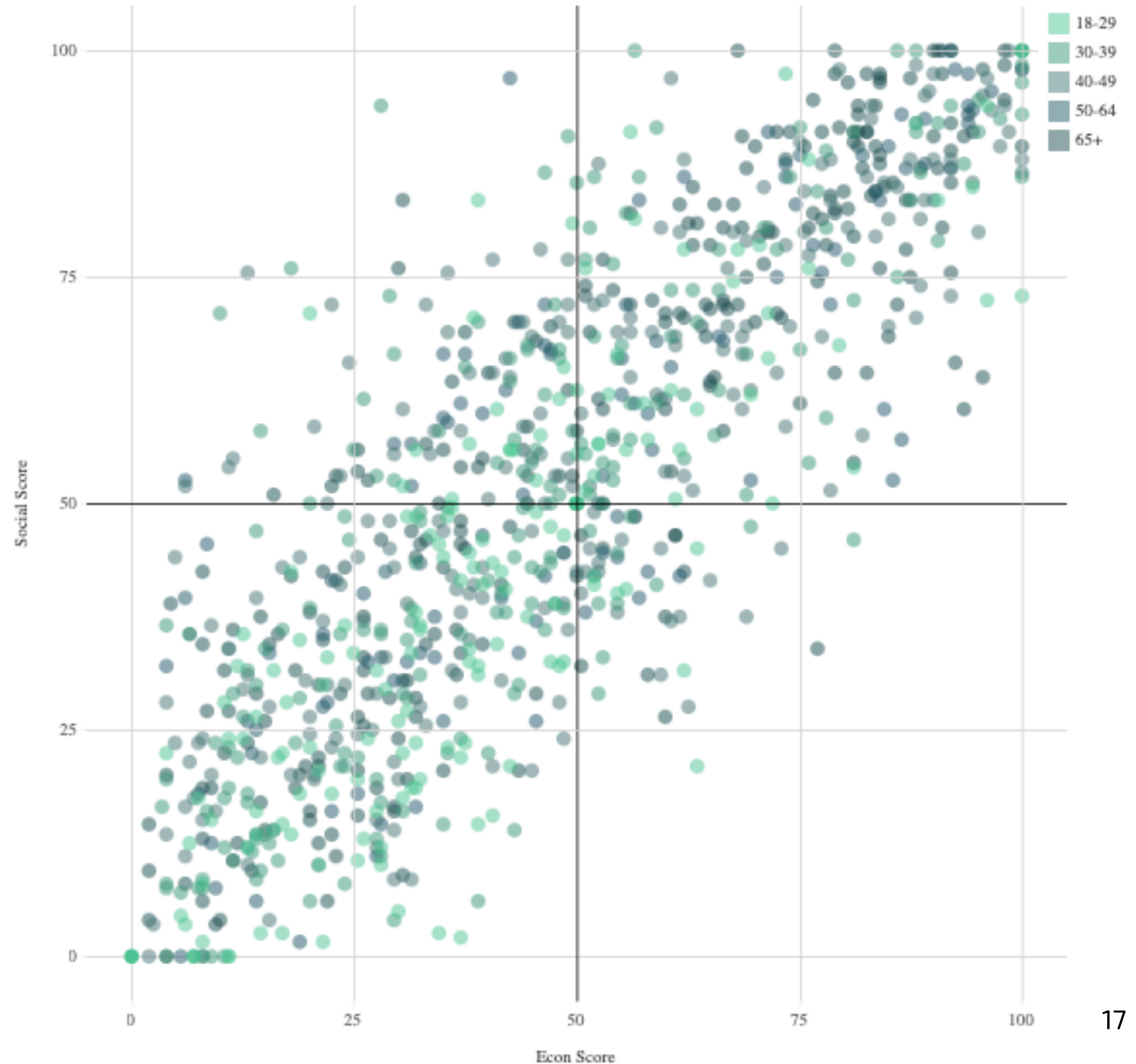


- Self-Identified Liberal
- Self-Identified Moderate
- Self-Identified Conservative
- Unsure

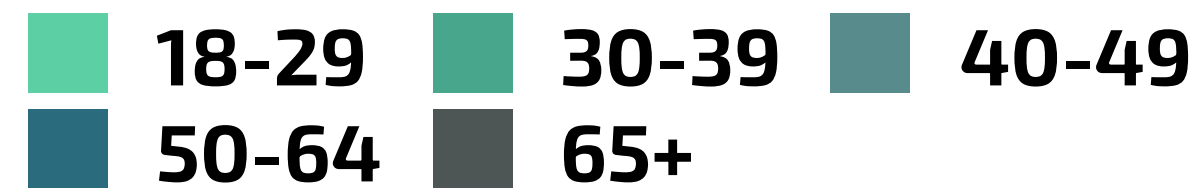
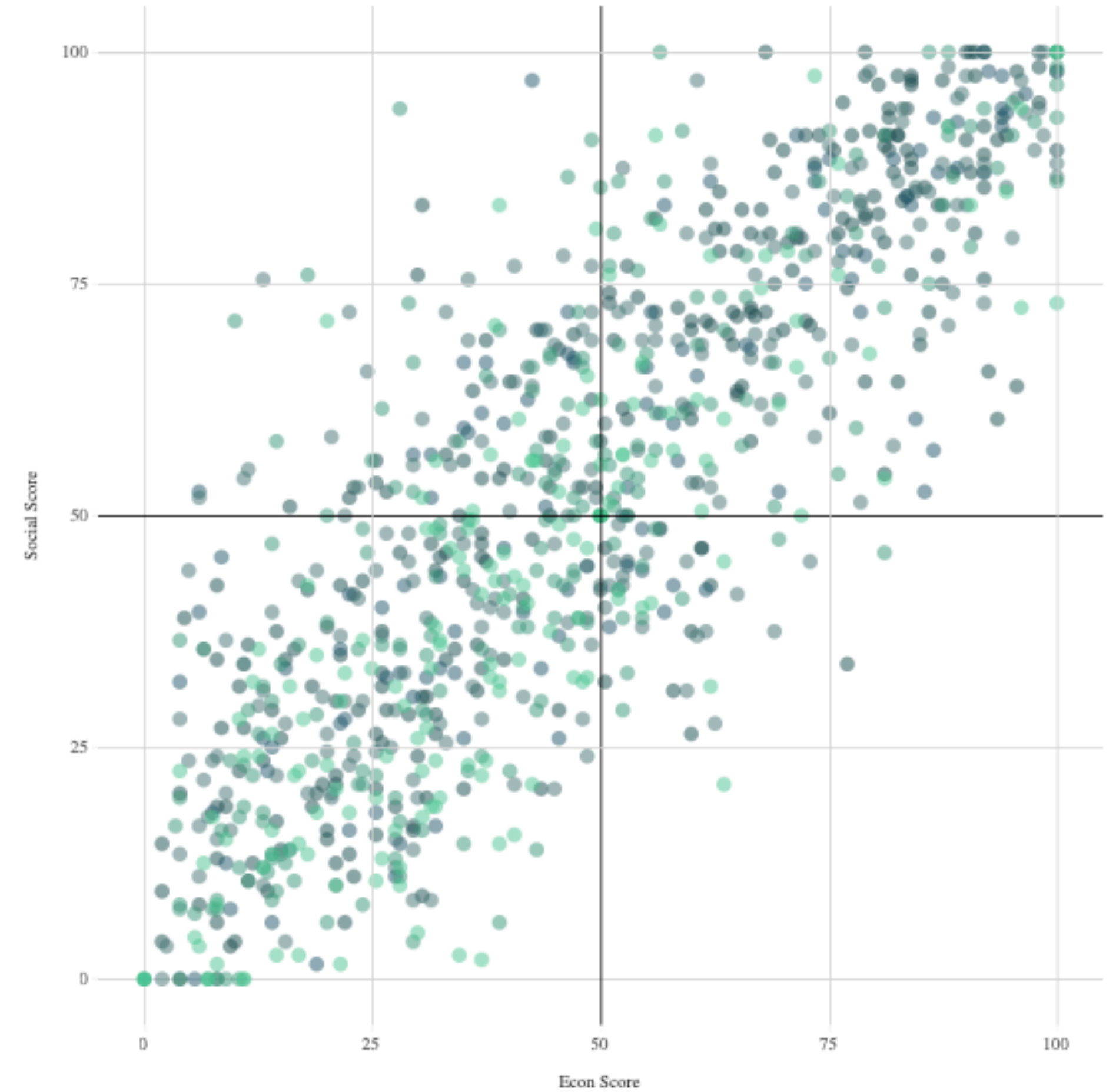
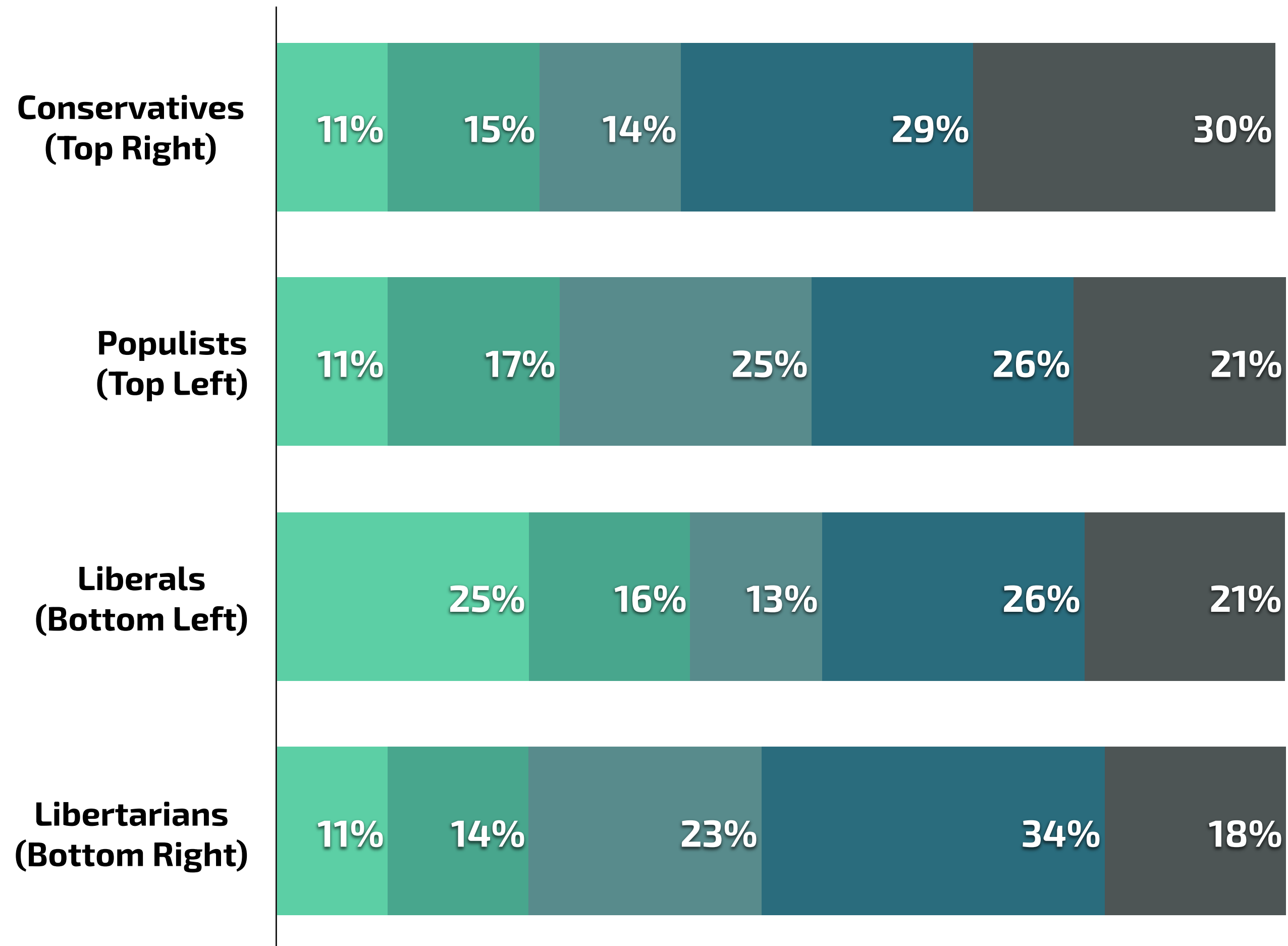


Age Groups

- Conservative and Libertarian quadrants composed of mostly 50+ voters.
- Voters under 50 make up the majority of the Liberal and Populist quadrants.



Over Half Of Liberal and Populist Quadrants Under 50

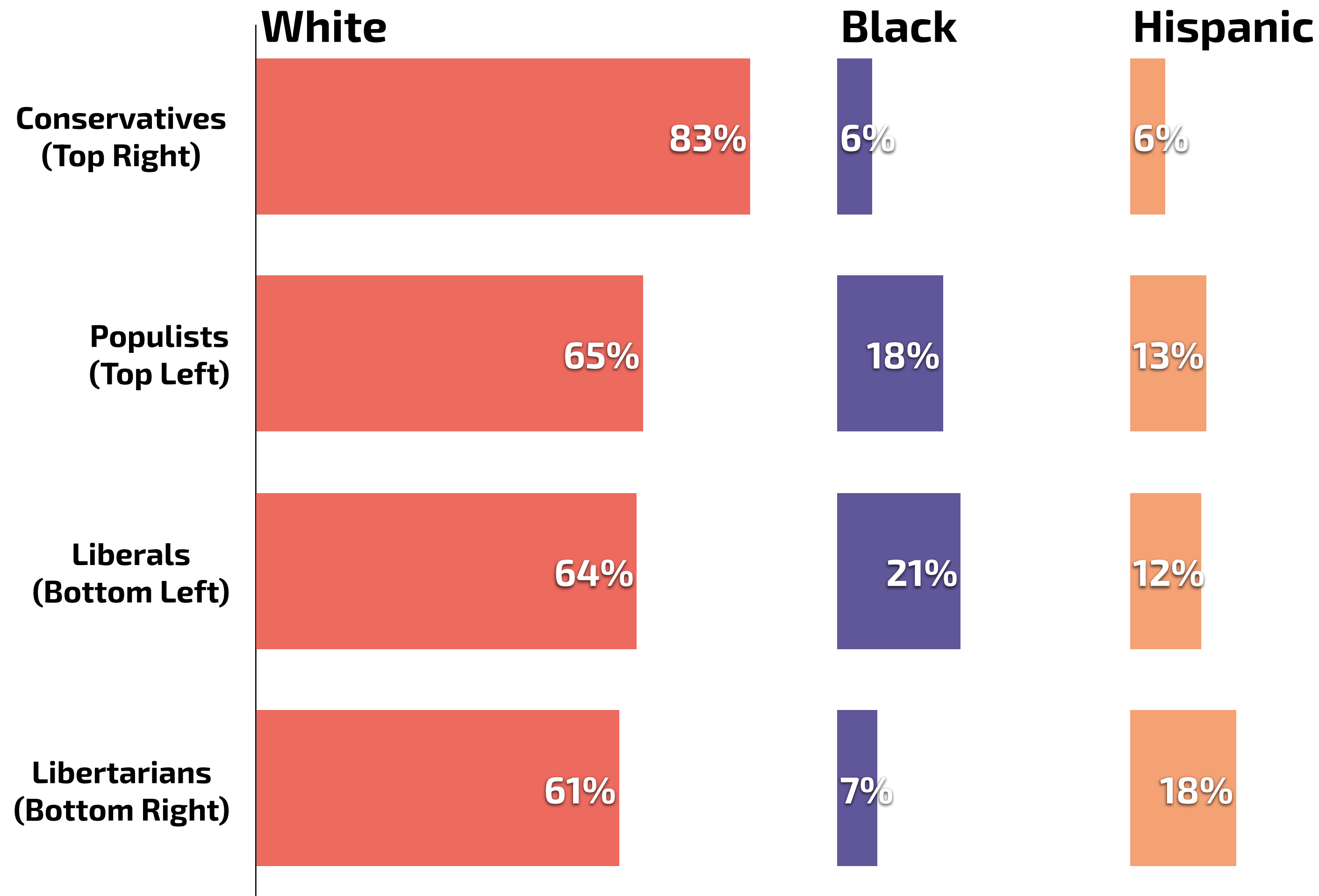


Race

- White voters make up a strong majority of the Conservative quadrant, with relatively even distribution in the other three quadrants.
- Populist and Liberal quadrants almost have an even composition of black and hispanic voters.

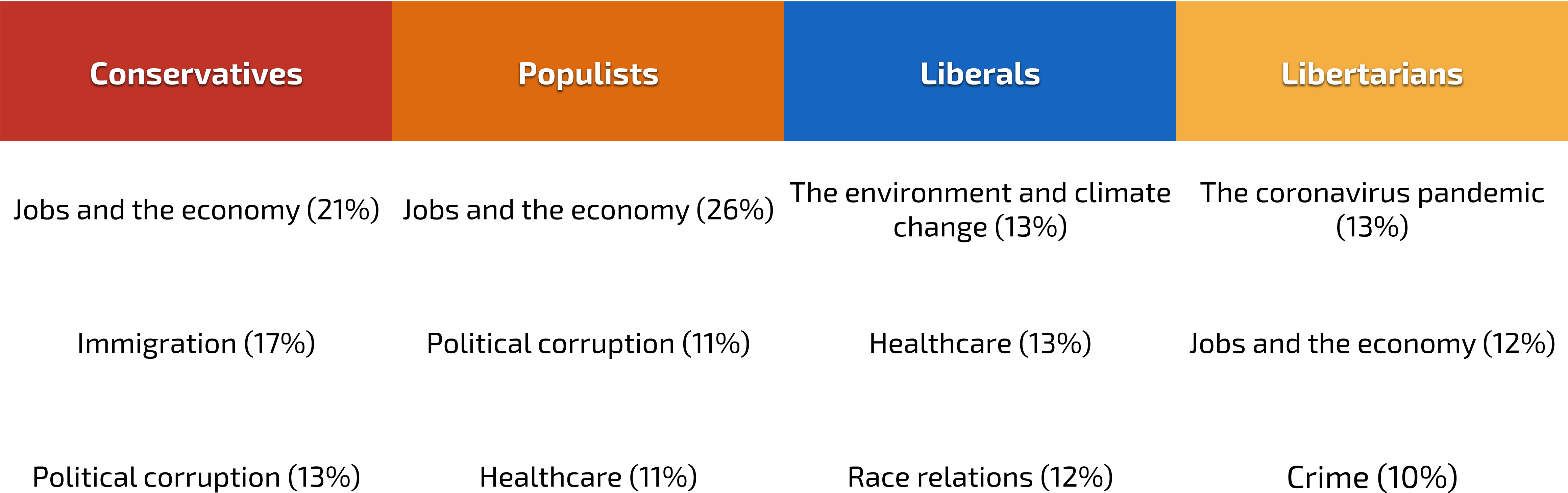


Liberals & Populists are Most Racially Diverse



Focus on Jobs Separates Populists from Liberals

Q. If you had to choose just one, which would you say is the biggest issue facing the country today?



Strong Conservatives Say Immigration, Economy Is Top Issue; Strong Liberals Say Race Relations

Q. If you had to choose just one, which would you say is the biggest issue facing the country today?








Conservatives	Strong Conservatives	Liberals	Strong Liberals
Jobs and the economy (21%)	Immigration (26%)	The environment and climate change (13%)	Race relations (24%)
Immigration (17%)	Jobs and the economy (21%)	Healthcare (13%)	The environment and climate change (16%)
Political corruption (13%)	Political corruption (17%)	Race relations (12%)	Healthcare (15%)

The United States As A Multi-Party Democracy



What If The U.S. Were A Multi-Party Democracy?






Respondents were read a description of 5 new political parties (but not their names or party leaders) and asked which they would support.

PARTY	LEADER	JUNE 2021	OCTOBER 2020	CHANGE	DESCRIPTION
NATIONALIST		24%	16%	+8%	Stop illegal immigration, put America First, stand up to political correctness, and end unfair trade deals
CONSERVATIVE		19%	25%	-6%	Defend the American system of free enterprise, promote traditional family values, and ensure a strong military
ACELA		10%	11%	-1%	Advance social progress including women's rights and LGBTQ rights, work with other countries through free trade and diplomacy, cut the deficit, and reform capitalism with sensible regulation
LABOR		26%	26%	0%	Put the middle class first, pass universal health insurance, strengthen labor unions, and raise taxes on the wealthy to support programs for those less well off
GREEN		9%	11%	-2%	Pass a Green New Deal to build a carbon-free economy with jobs for all, break up big corporations, end systemic inequality, and promote social and economic justice

Note: October 2020 survey was of the Likely Electorate, June 2021 was of Registered Voters

Party Profiles In A Multi-Party America

Respondents were read a description of 5 new political parties (but not their names or party leaders) and asked which they would support.

PARTY	LEADER	JUNE 2021	OCTOBER 2020	CHANGE	DESCRIPTION
NATIONALIST		24%	16%	+8%	The Trump Republican Party: Anti-Illegal immigration & political correctness, assert American national identity
CONSERVATIVE		19%	25%	-6%	The Pre-Trump Republican Party: Pro-Free Enterprise, socially conservative, strong on defense
ACELA		10%	11%	-1%	The Acela Corridor's idea of centrism: Socially liberal, globalist, fiscally responsible
LABOR		26%	26%	0%	A "hard-hat" version of today's Democratic Party, focused on bread-and-butter economic issues, not cultural issues.
GREEN		9%	11%	-2%	The political home of the Squad, pushing for a Green New Deal and socialist policies

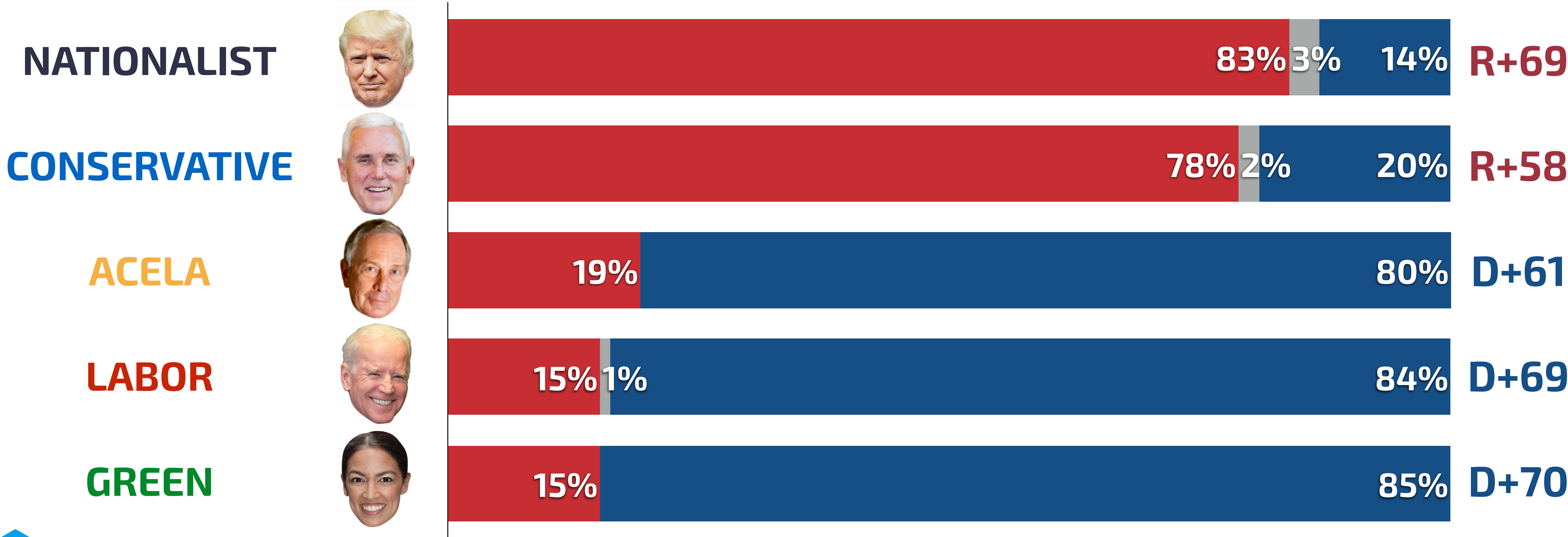


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Conservative, Acela Parties Have Most Crossover Appeal

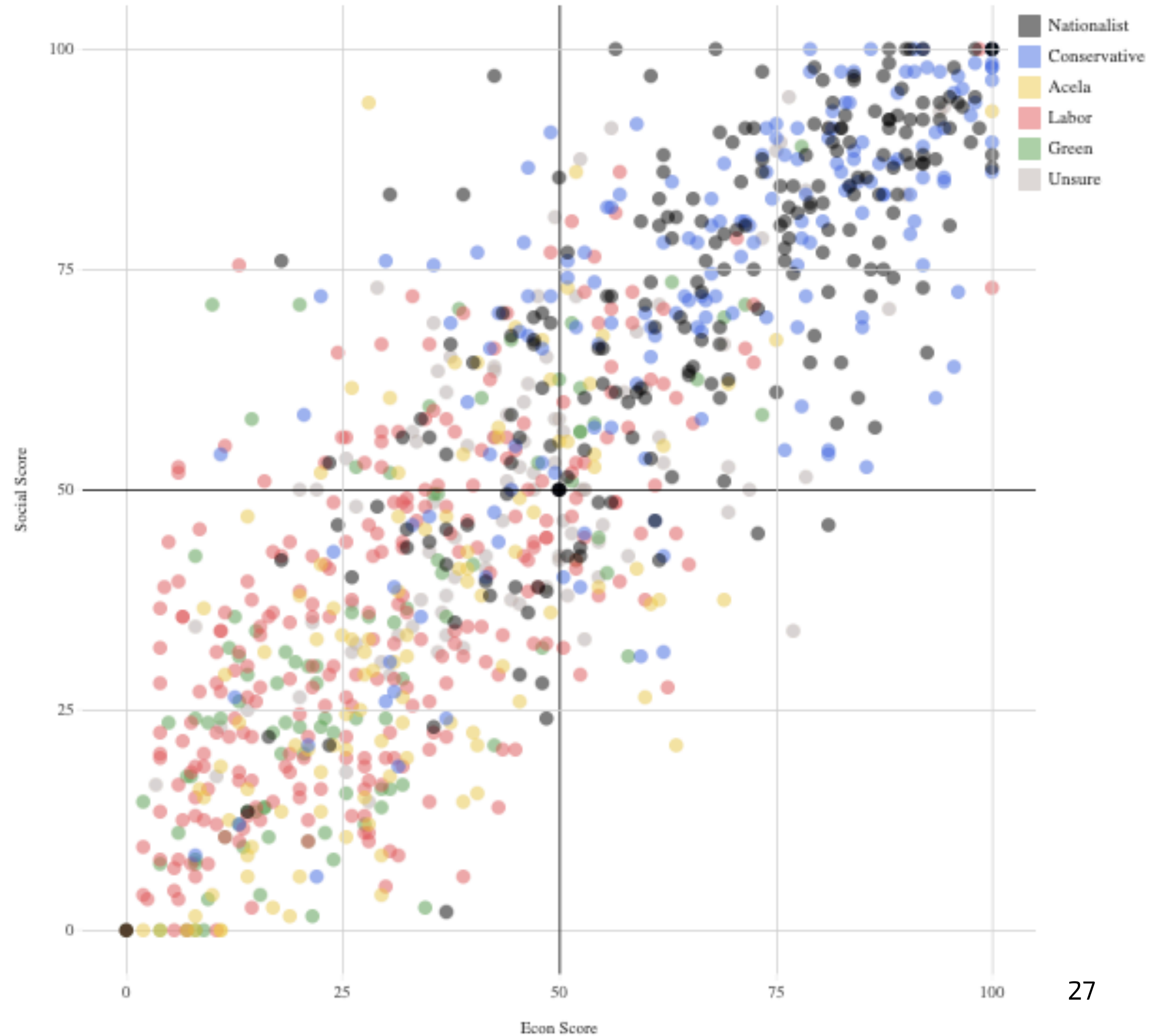
Q. For which candidate did you vote in the 2020 presidential election?

■ Donald Trump
 ■ Other/Unsure
 ■ Joe Biden

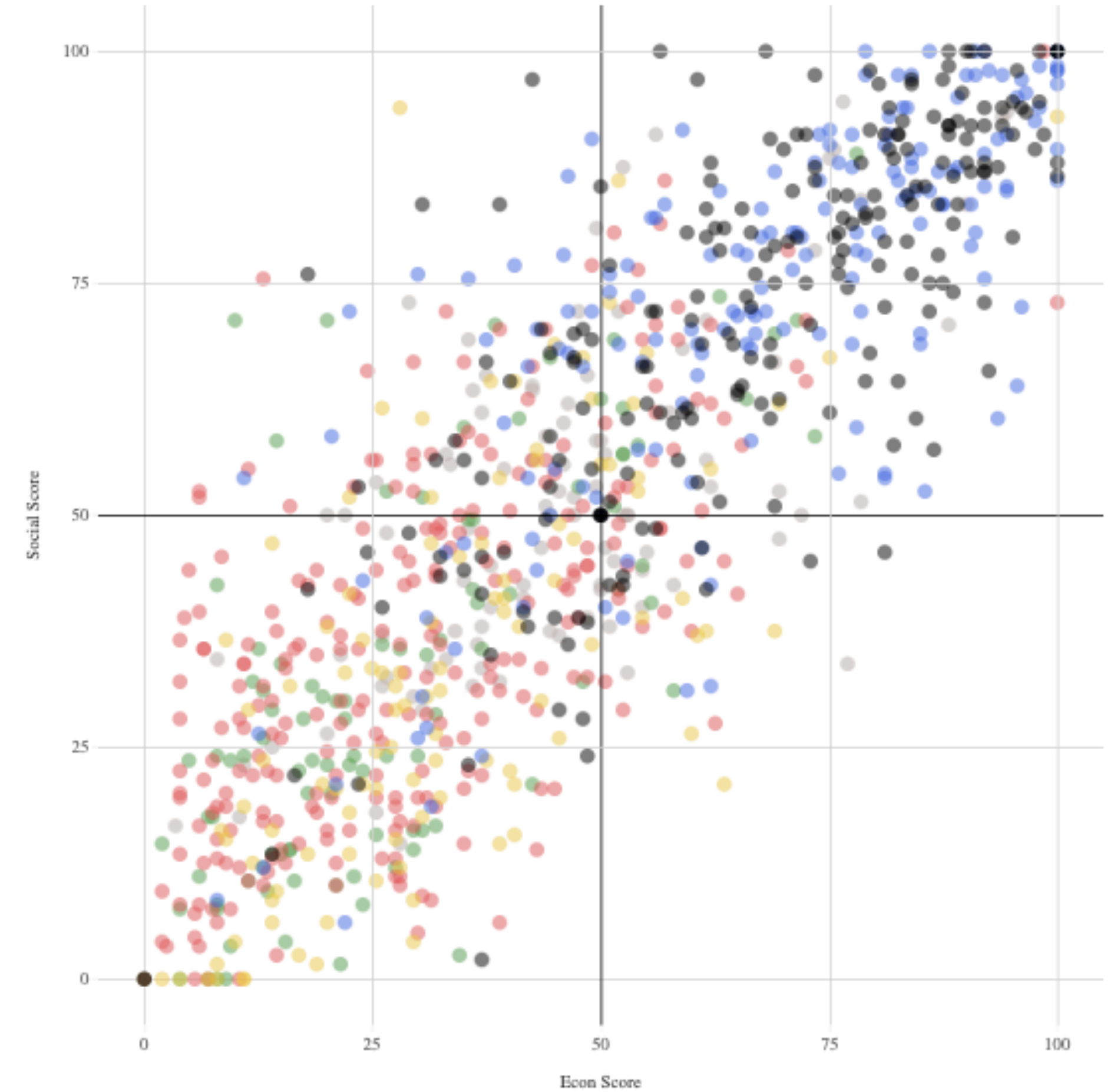
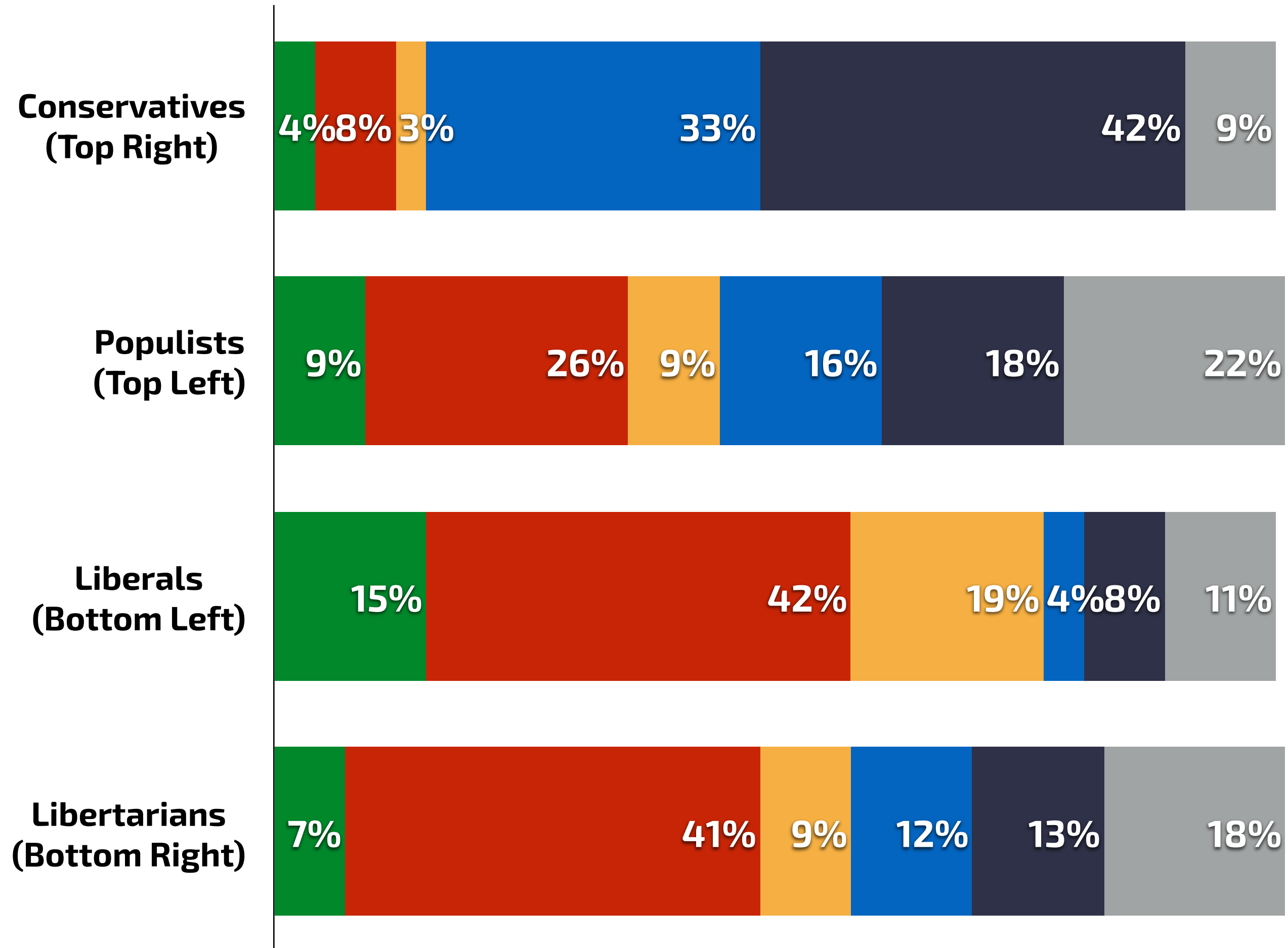


Multi-Party Democracy

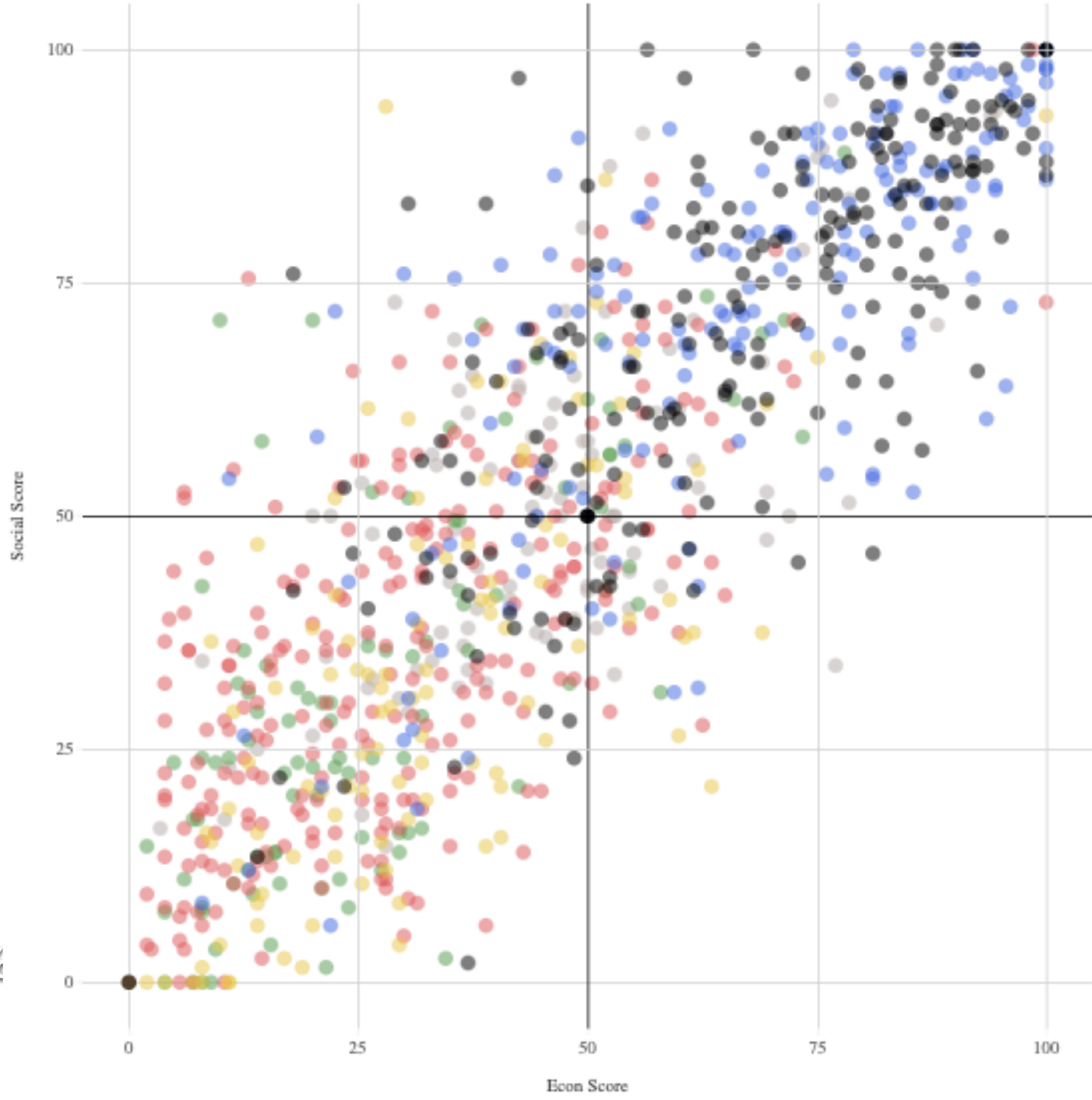
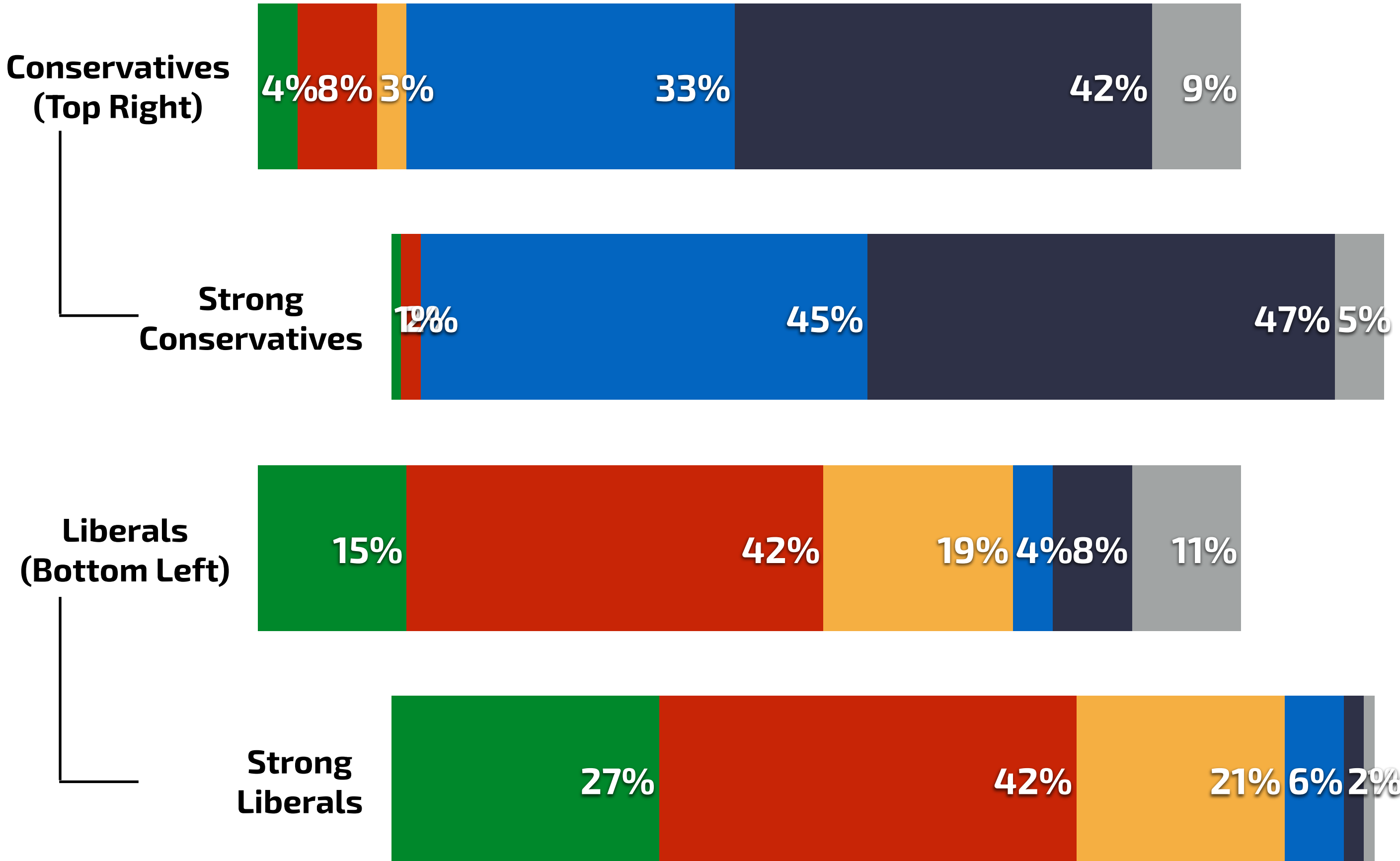
- Over 70% of the Conservative quadrant supports either the Nationalist or Conservative party.
- Labor garners 42% support in the Liberal quadrant; Acela with 19%.
- Populists are split between Center-Left and Center-Right parties.



Populists Split Between Center-Left And Center-Right Parties

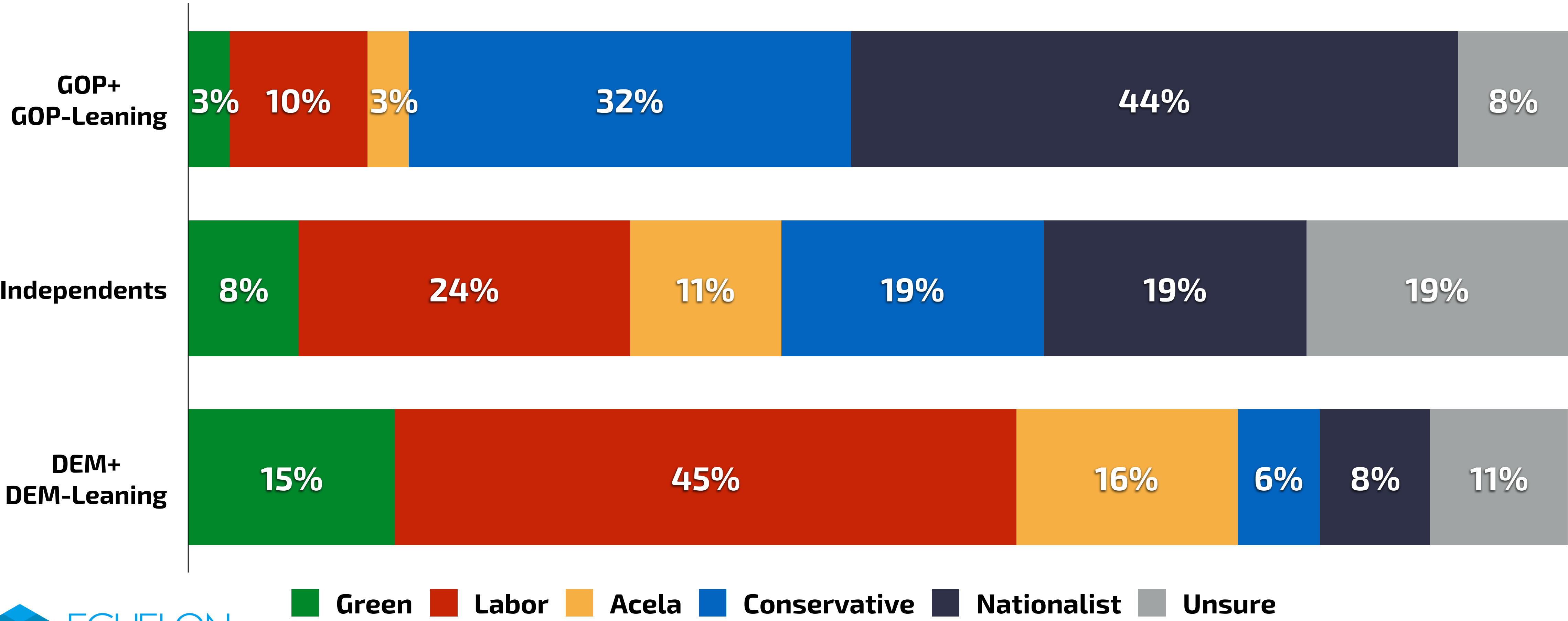


Strong Liberals Drive Green Party Support



- Green
- Labor
- Acela
- Conservative
- Nationalist
- Unsure

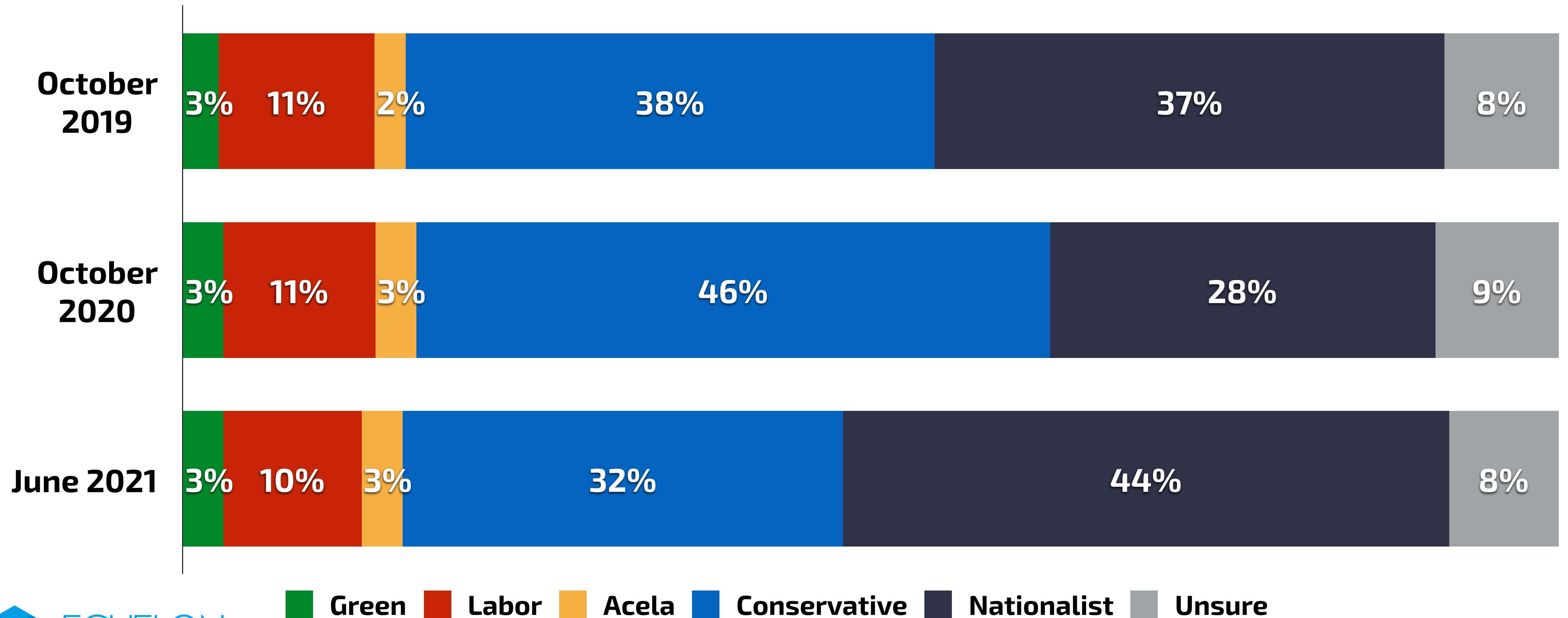
Nationalist Party Wins Among GOP, Labor With Democrats



Green Labor Acela Conservative Nationalist Unsure

Nationalist Support Among GOP Reaches New High

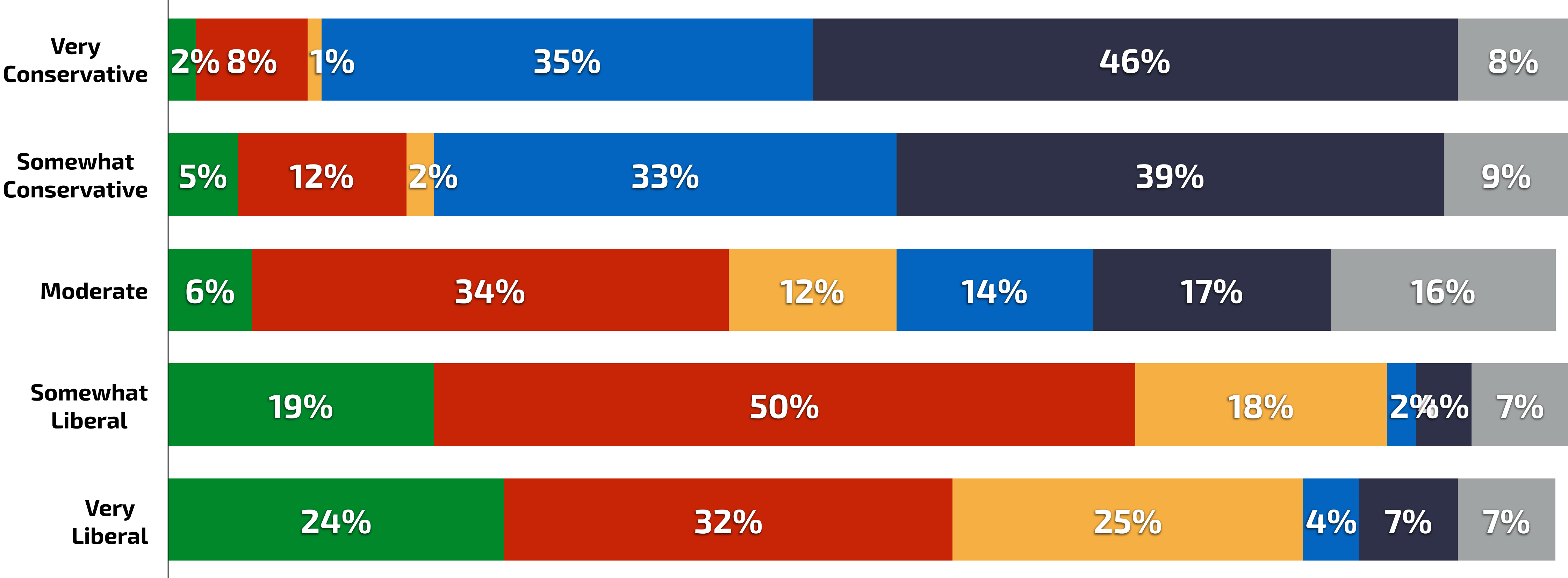
Republican and Republican-leaning Independents



Green Labor Acela Conservative Nationalist Unsure

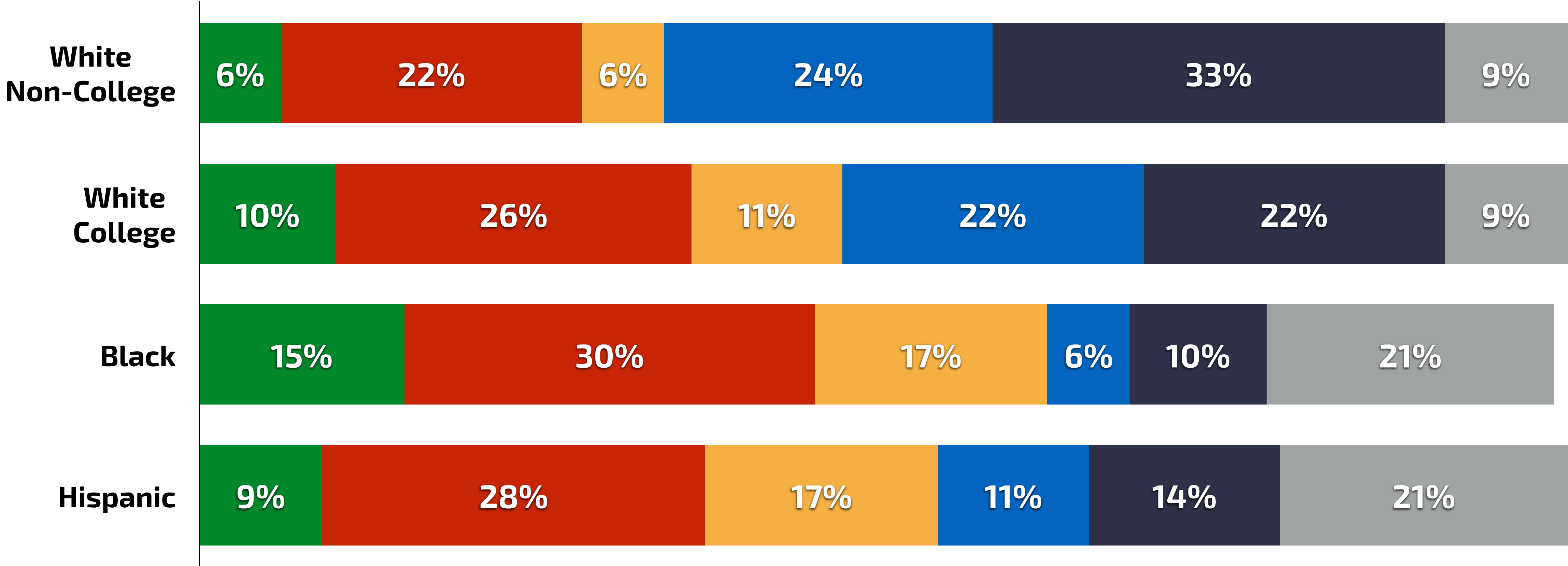
Note: October 2020 survey was of the Likely Electorate, June 2021 and October 2019 surveys were of Registered Voters

Ideological Moderates Support Center-Left Parties



■ Green
 ■ Labor
 ■ Acela
 ■ Conservative
 ■ Nationalist
 ■ Unsure

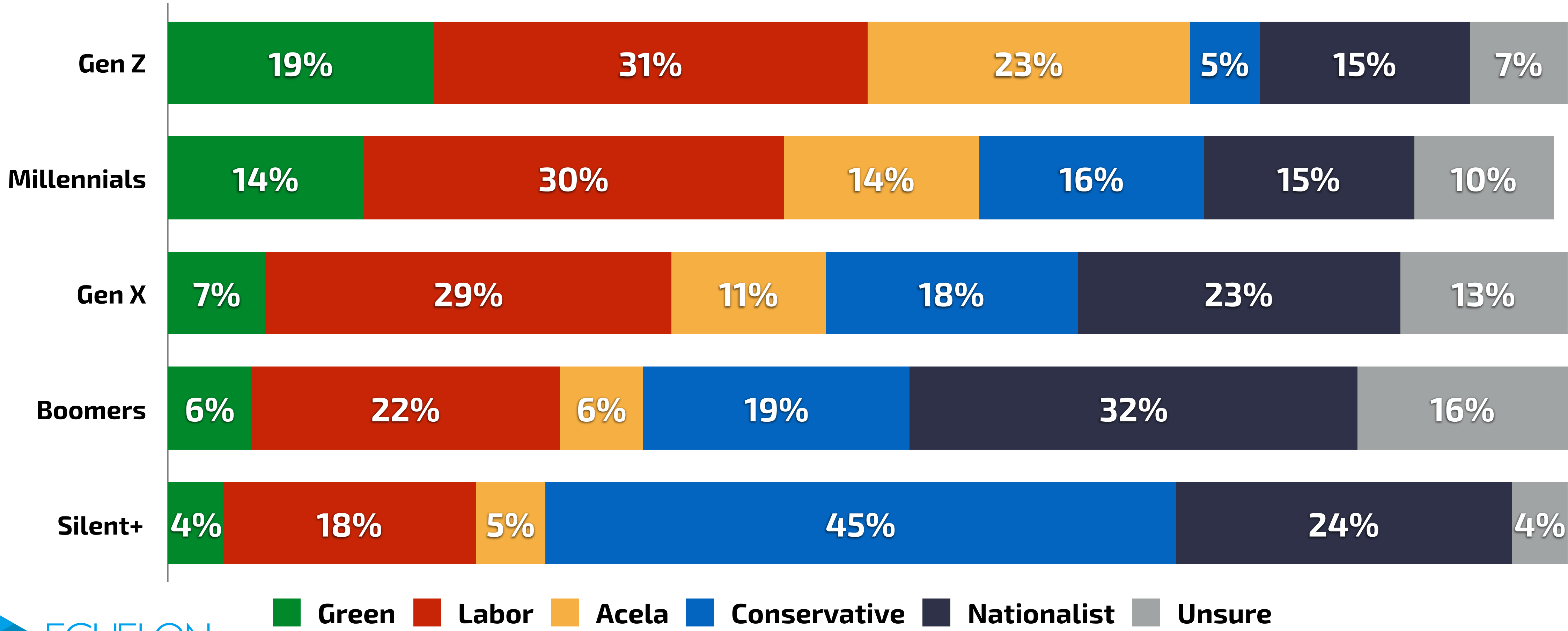
Center-Right Parties Would Combine For 25% Of Hispanic Vote, 16% Of Black Vote



■ Green
 ■ Labor
 ■ Acela
 ■ Conservative
 ■ Nationalist
 ■ Unsure

Only 20% Of Gen Z Would Support A Center-Right Party

Gen X More Divided Between The Left And Right





Verified Voter Omnibus

Your questions answered by real voters

Beyond our own public releases, the Verified Voter Omnibus is a resource companies and organizations can use to answer mission-critical questions through add-on questions to the monthly survey. It's the perfect tool for tracking a few core questions over time or gathering that one bit of crucial public opinion data you need right now.

By adding on to the Verified Voter Omnibus, you'll receive:

- **Hands-on assistance with drafting your questions**
- **Full topline and crosstabs with 2020 election questions included**
- **A customized slide deck with your results**

Contact omnibus@echeloninsights.com for more information.





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