

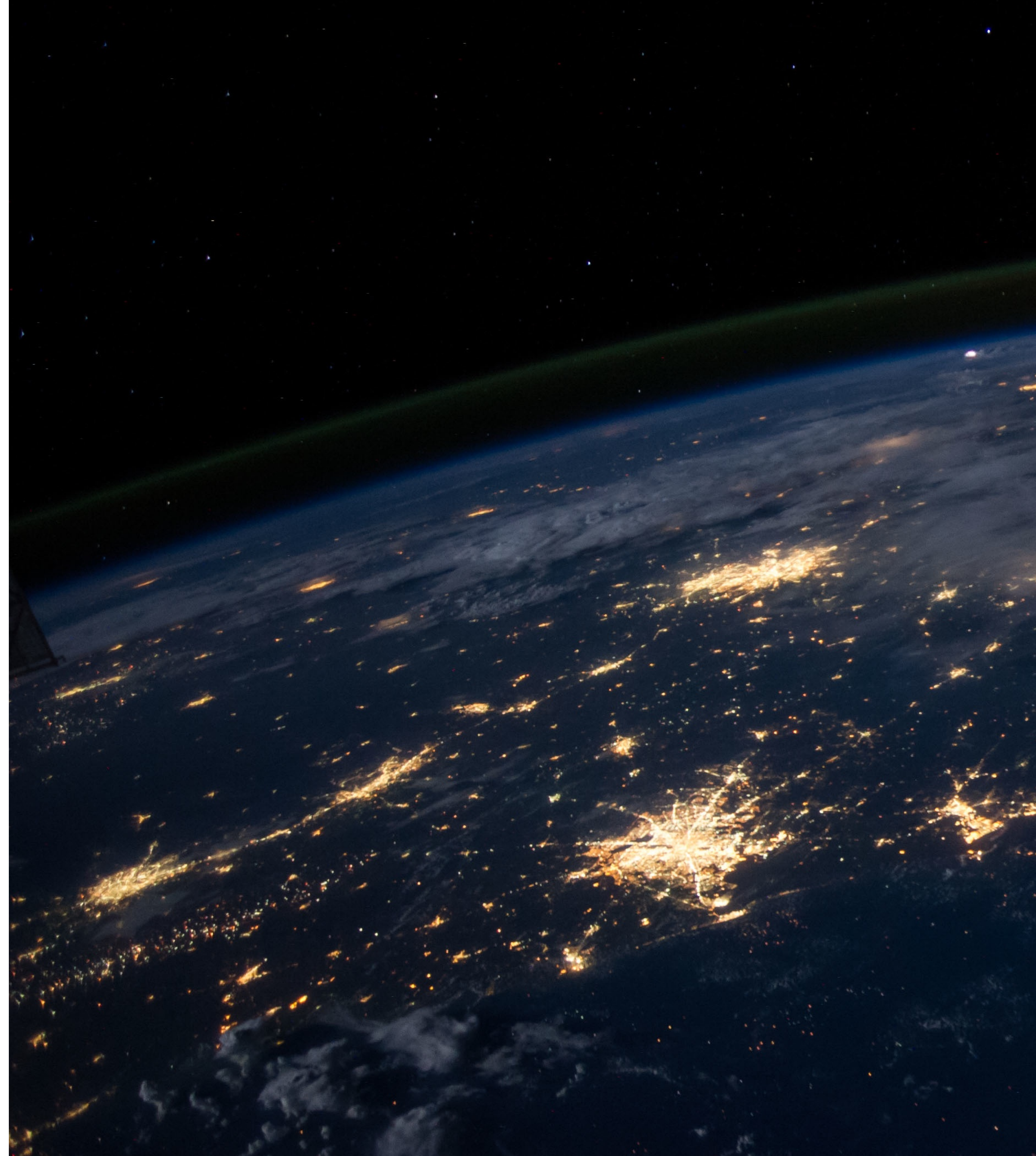


Quadrants 2023

Verified Voter Omnibus Survey

N = 1,020 voters in the 2024 Likely Electorate

Field Dates: June 26-29, 2023



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	57%	↔	38%	Abortion should be illegal in all or most circumstances
America is not the greatest country in the world	32%	↔	62%	America is the greatest country in the world
It is more important to control gun ownership	52%	↔	44%	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%	↔	56%	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	25%	↔	65%	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	44%	↔	49%	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	44%	↔	51%	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	32%	↔	61%	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%	↔	40%	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	63%	↔	30%	Gay and lesbian couples should not be allowed to marry legally



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

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.

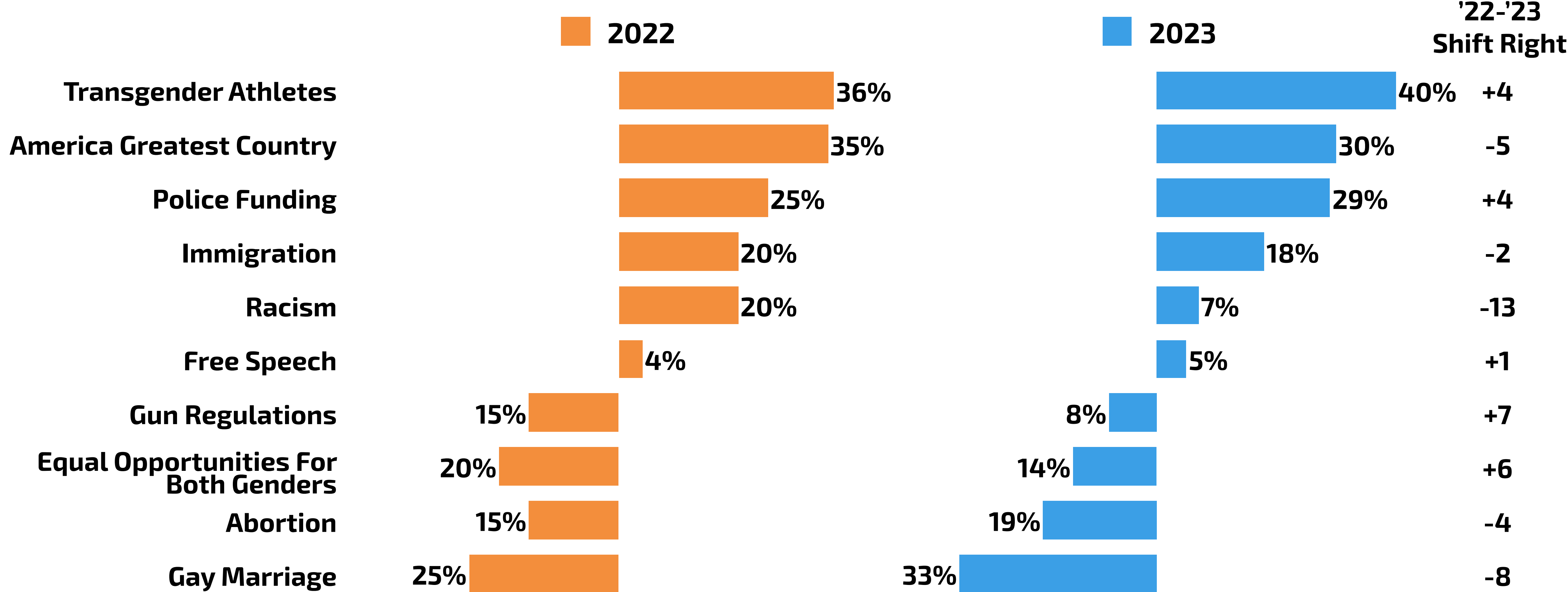
Liberal			Conservative	
Hard work and determination are no guarantee of success for most people	42%	↔	55%	Most people who want to get ahead can make it if they're willing to work hard
I would rather have a bigger government providing more services	50%	↔	42%	I would rather have a smaller government providing 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	49%	↔	46%	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%	↔	44%	Government regulation of business usually does more harm than good
The federal minimum wage must be increased to \$15 an hour	63%	↔	32%	The federal minimum wage should not be increased to \$15 an hour
Free trade agreements have generally hurt the United States	31%	↔	46%	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	52%	↔	35%	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	61%	↔	34%	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	52%	↔	41%	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	65%	↔	27%	We should not raise taxes on people making more than \$200,000 a year



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

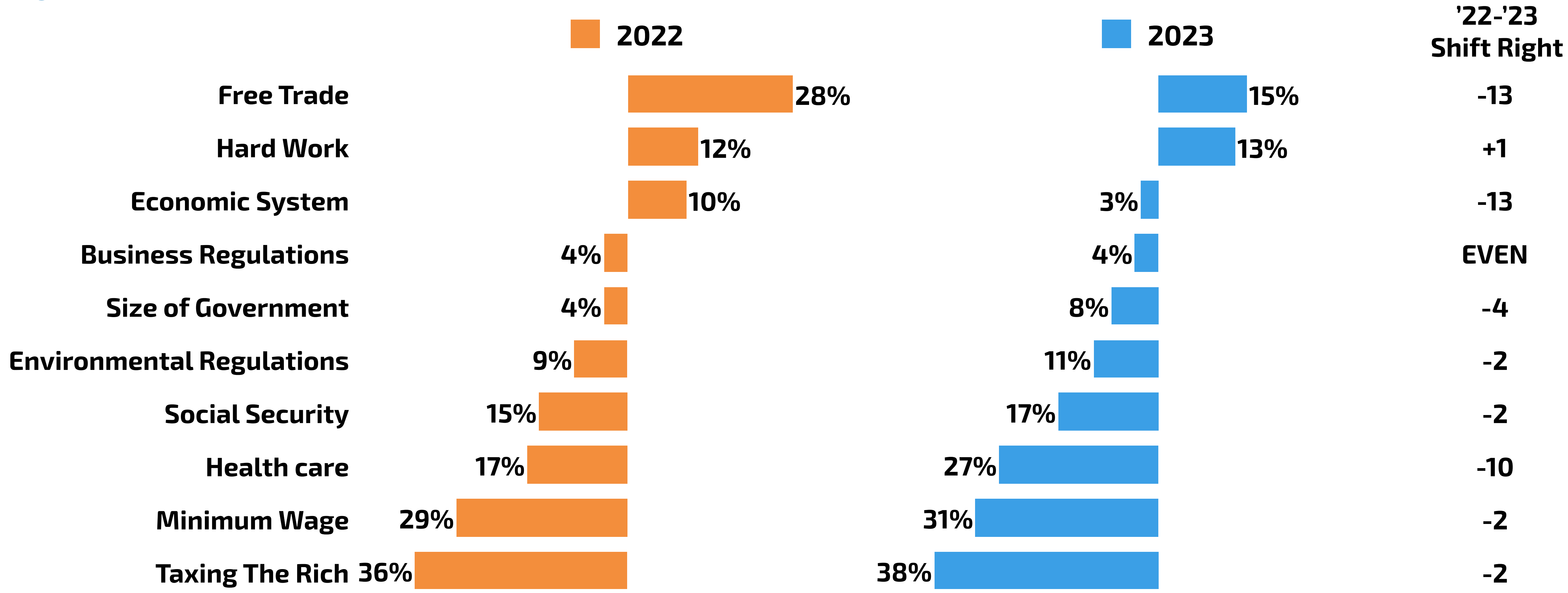
Note: Unsure not shown

Among Cultural Issues, U.S. Remains Most Conservative On Trans Athletes And Most Liberal On Gay Marriage



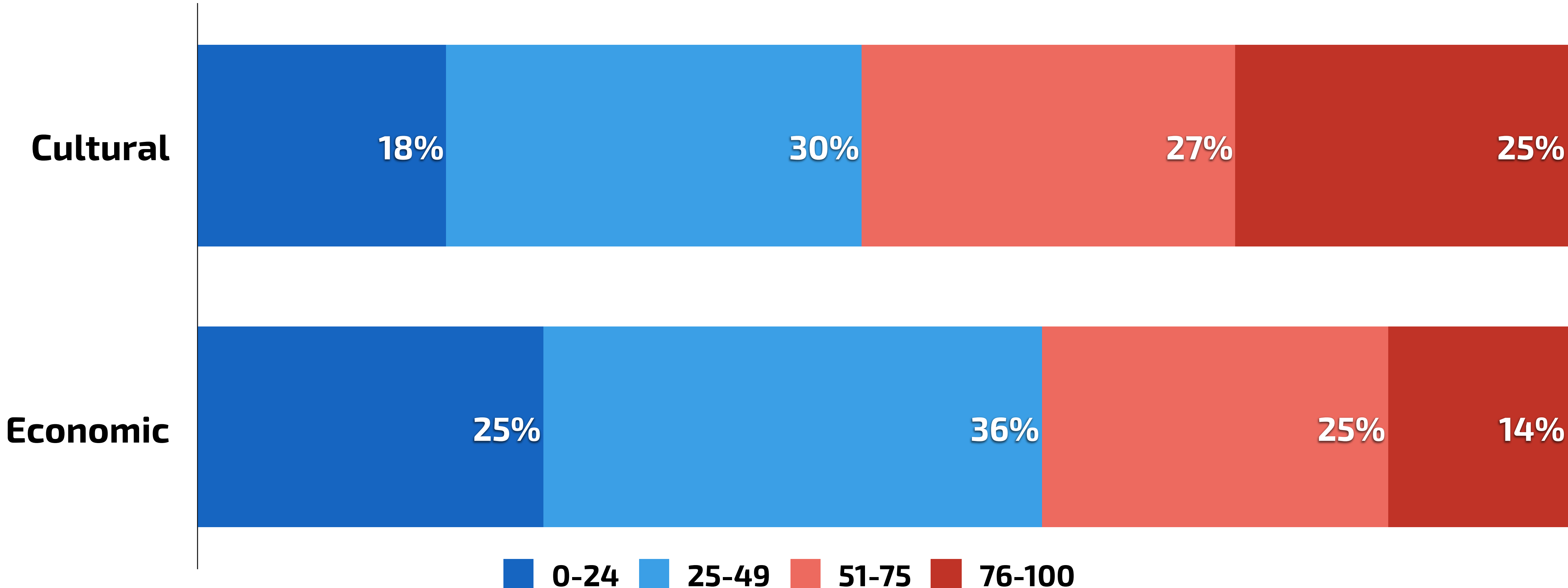
N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Voters Trend Left On Free Trade, Inequality Of Economic System, And Role Of Government In Healthcare Since Last Year



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Cultural Conservatives Outnumber Cultural Liberals 52-48, Economic Liberals Outnumber Economic Conservatives 61-39



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: Scores under 50 are liberal, scores over 50 are conservative; 50s are divided evenly between liberal and conservative groupings; numbers may not add up to 100 due to rounding

Demographics Of Strong Liberals And Conservatives

	Registered Voters	Strong Cultural Liberals	Strong Fiscal Liberals	Strong Cultural Conservatives	Strong Fiscal Conservatives
Gender	46% male 53% female	35% male 63% female	39% male 61% female	66% male 34% female	63% male 37% female
Age	43% under 50 57% 50+	64% under 50 36% 50+	44% under 50 56% 50+	30% under 50 70% 50+	29% under 50 71% 50+
Race	69% White 14% Black 12% Hispanic/Latino	58% White 14% Black 17% Hispanic/Latino	62% White 18% Black 11% Hispanic/Latino	87% White 5% Black 7% Hispanic/Latino	83% White 4% Black 11% Hispanic/Latino
Income	46% <\$50k/yr 52% >\$50k/yr	41% <\$50k/yr 58% >\$50k/yr	47% <\$50k/yr 53% >\$50k/yr	47% <\$50k/yr 52% >\$50k/yr	37% <\$50k/yr 63% >\$50k/yr
Urbanicity	28% City 43% Suburb 29% Small town/rural	32% City 47% Suburb 21% Small town/rural	36% City 44% Suburb 20% Small town/rural	15% City 45% Suburb 40% Small town/rural	17% City 48% Suburb 35% Small town/rural
Education	61% Non-College 39% College	50% Non-College 50% College	54% Non-College 45% College	64% Non-College 36% College	58% Non-College 42% College



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Demographics Of Liberals And Conservatives, Cont.

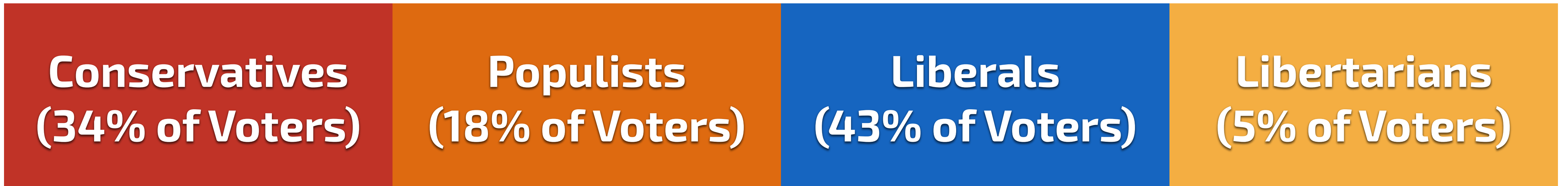
	Registered Voters	More Fiscally Conservative Than Culturally (30% Overall)	More Culturally Conservative Than Fiscally (67% Overall)
Gender	46% male 53% female	37% male 61% female	51% male 49% female
Age	43% under 50 57% 50+	53% under 50 47% 50+	39% under 50 61% 50+
Race	69% White 14% Black 12% Hispanic/Latino	68% White 13% Black 15% Hispanic/Latino	71% White 14% Black 11% Hispanic/Latino
Income	46% <\$50k/yr 54% >\$50k/yr	39% <\$50k/yr 60% >\$50k/yr	49% <\$50k/yr 49% >\$50k/yr
Urbanicity	28% City 43% Suburb 29% Small town/rural	26% City 44% Suburb 29% Small town/rural	28% City 41% Suburb 30% Small town/rural
Education	61% Non-College 39% College	57% Non-College 43% College	63% Non-College 37% College



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Defining The Four Quadrants

Voters were grouped into four quadrants based on how they answered the 10 cultural and 10 economic questions in the June 2023 Echelon Insights Verified Voter Omnibus.



Culturally Conservative
(Cultural Score 51-100)

Culturally Conservative
(Cultural Score 51-100)

Culturally Liberal
(Cultural Score 0-49)

Culturally Liberal
(Cultural Score 0-49)

Economically Conservative
(Economic Score 51-100)

Economically Liberal
(Economic Score 0-49)

Economically Liberal
(Economic Score 0-49)

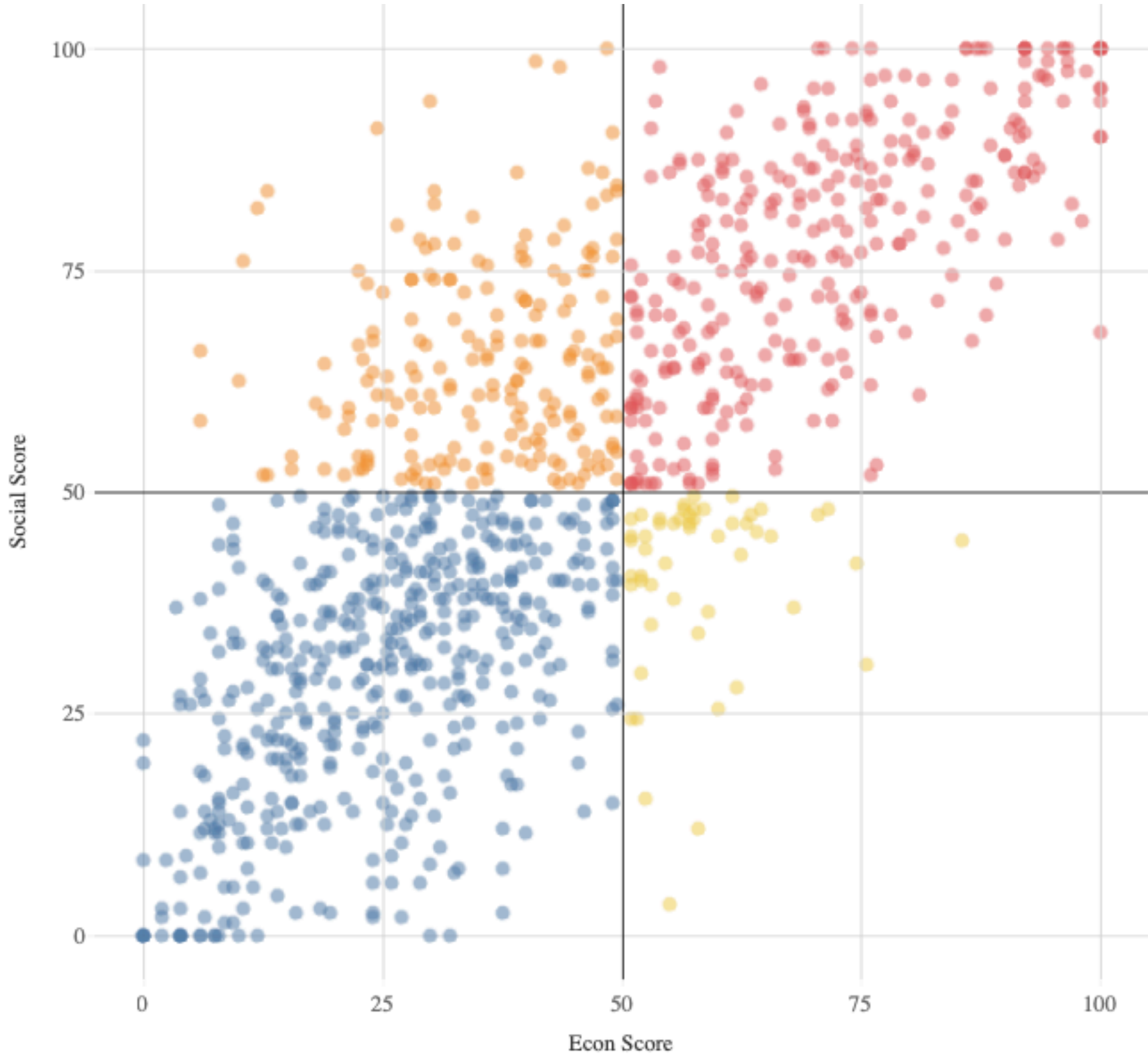
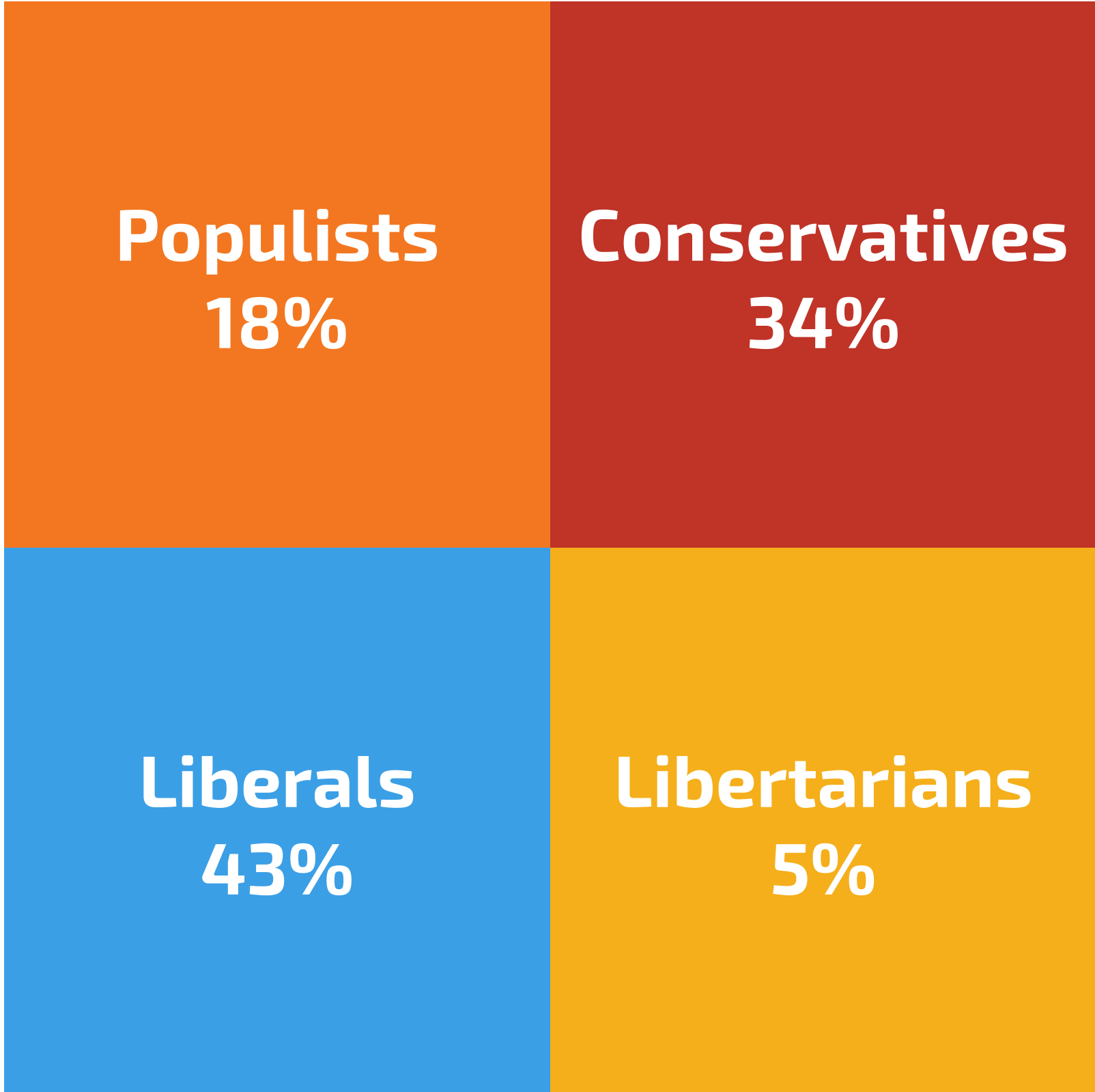
Economically Conservative
(Economic Score 51-100)



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: numbers may not add up to 100 due to rounding

18% Of Voters Are Culturally Conservative, Economically Liberal



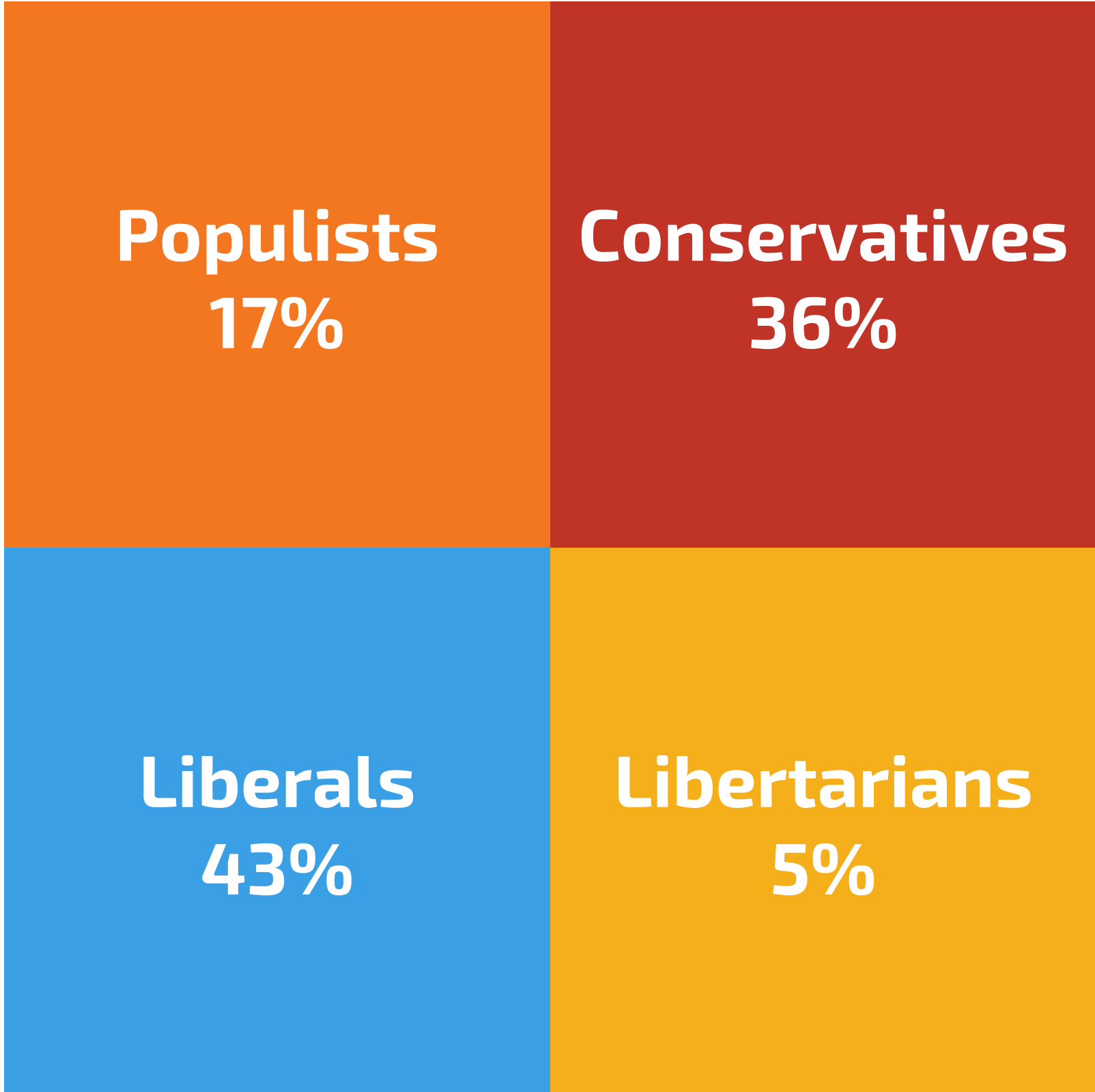
N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: numbers may not add up to 100 due to rounding

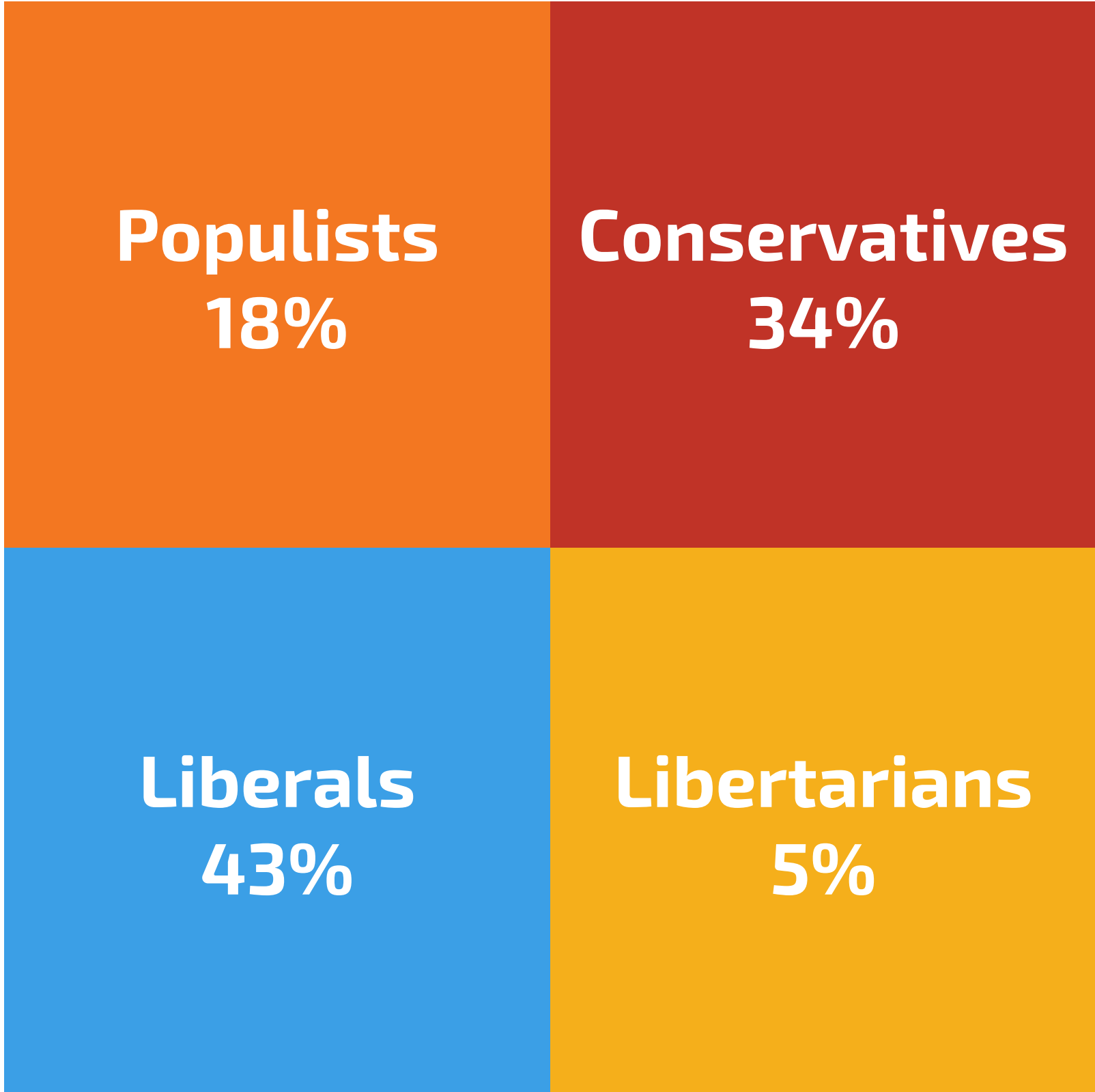


Voters Quadrants Have Held Steady Over The Last Year

2022



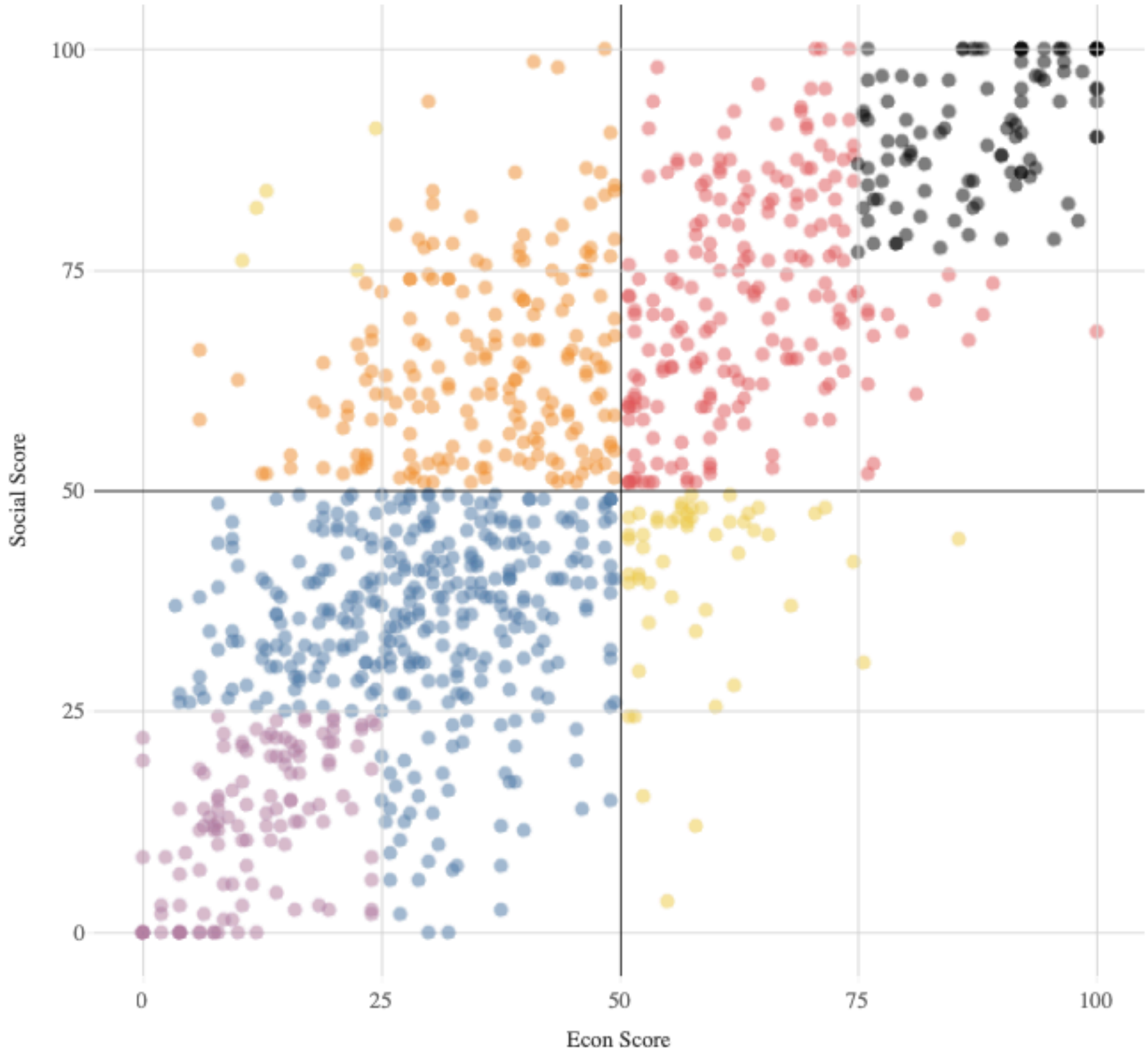
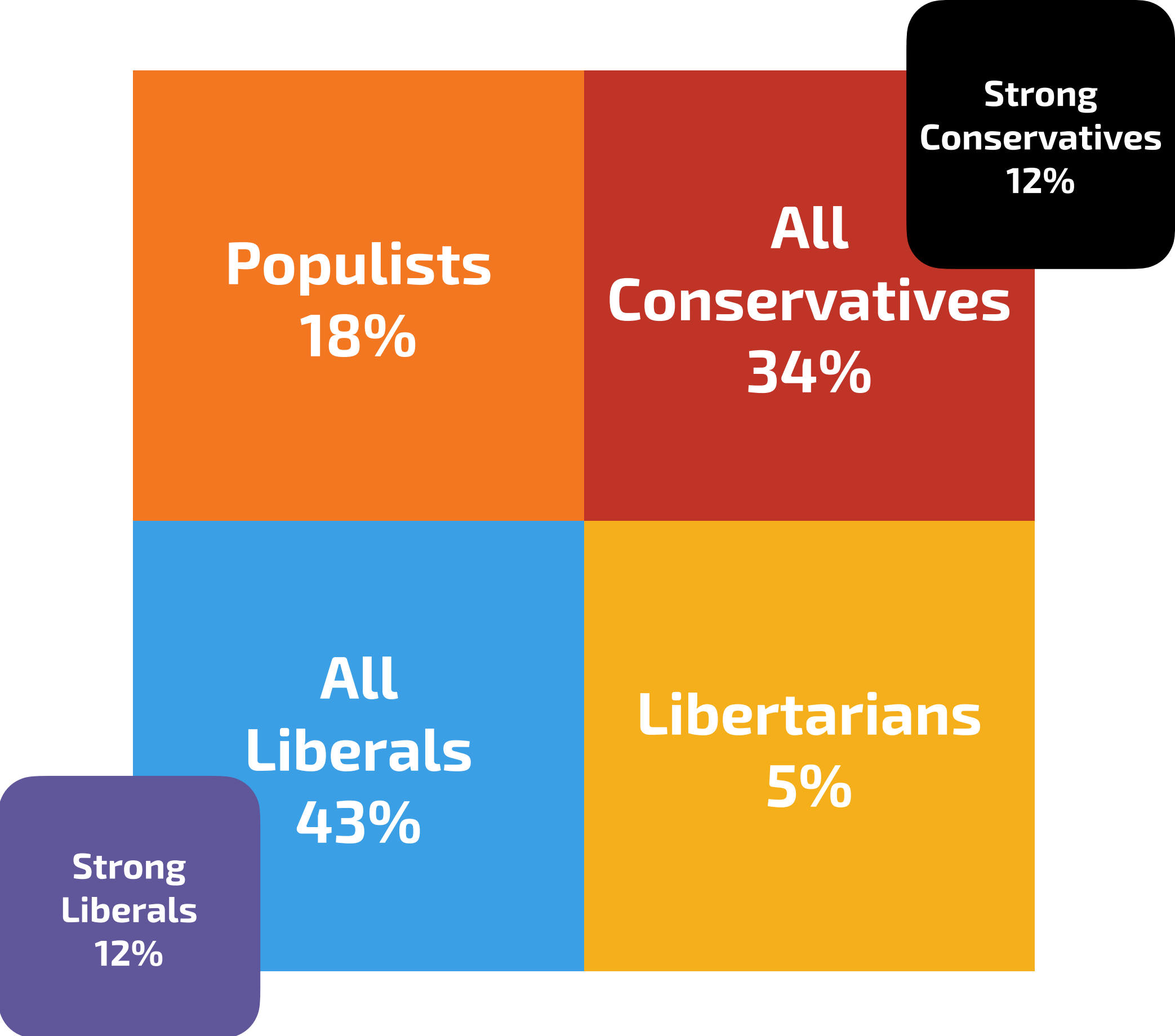
2023



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: numbers may not add up to 100 due to rounding

Strong Conservatives And Strong Liberals Each Make Up 12% Of Electorate



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: numbers may not add up to 100 due to rounding



An Interactive
Tableau Of The
Quadrants With
Information On Party,
Race, Age, And More
Can Be Found Here:
[https://tinyurl.com/
echelon-
quadrants-2023](https://tinyurl.com/echelon-quadrants-2023)



Mapping Registered Voters by Political Ideology

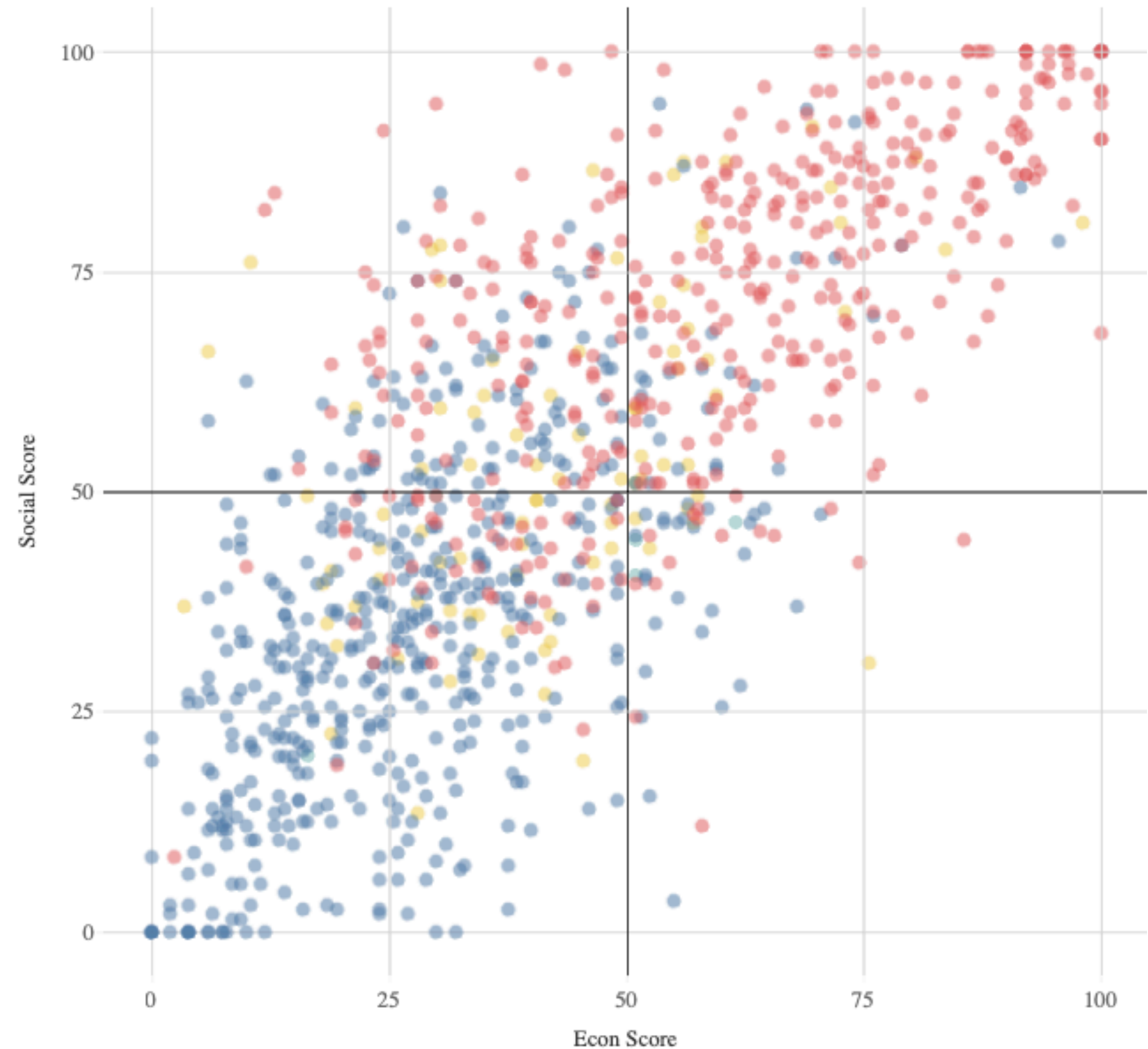


N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023



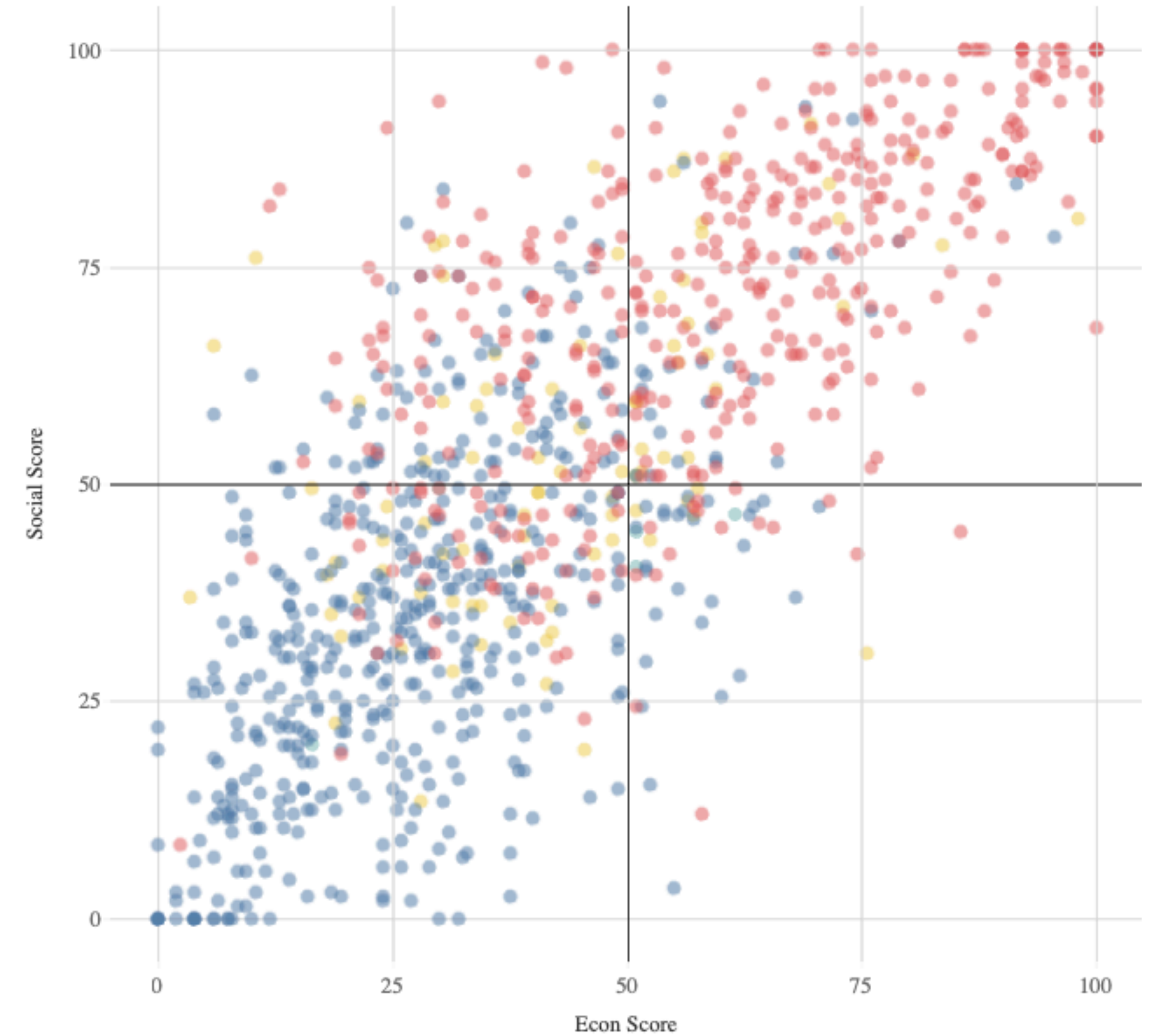
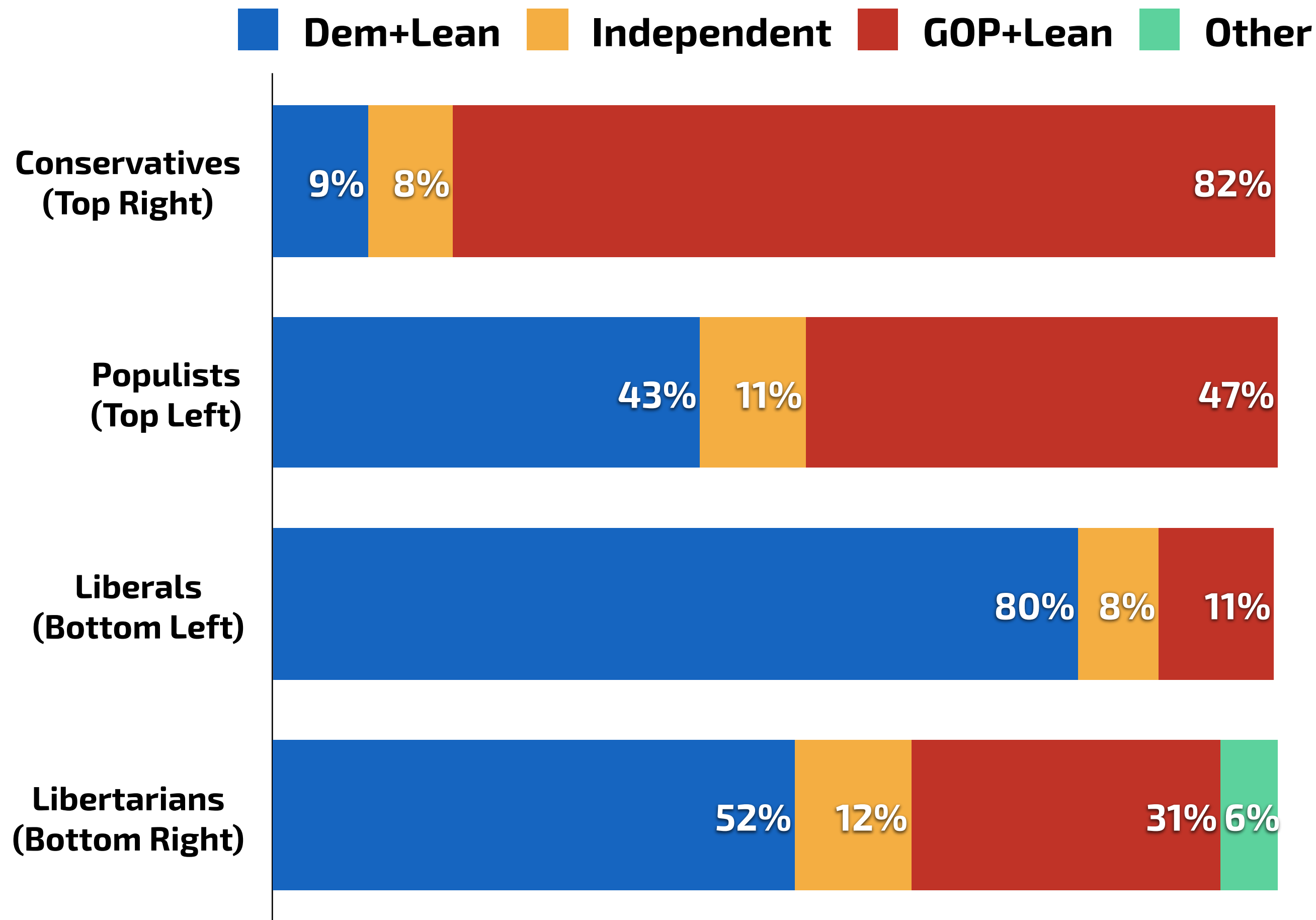
Party Identification

- The Conservative and Liberal quadrants are heavily populated with their respective partisans.
- Republicans are more common than Democrats in the Populist quadrant.



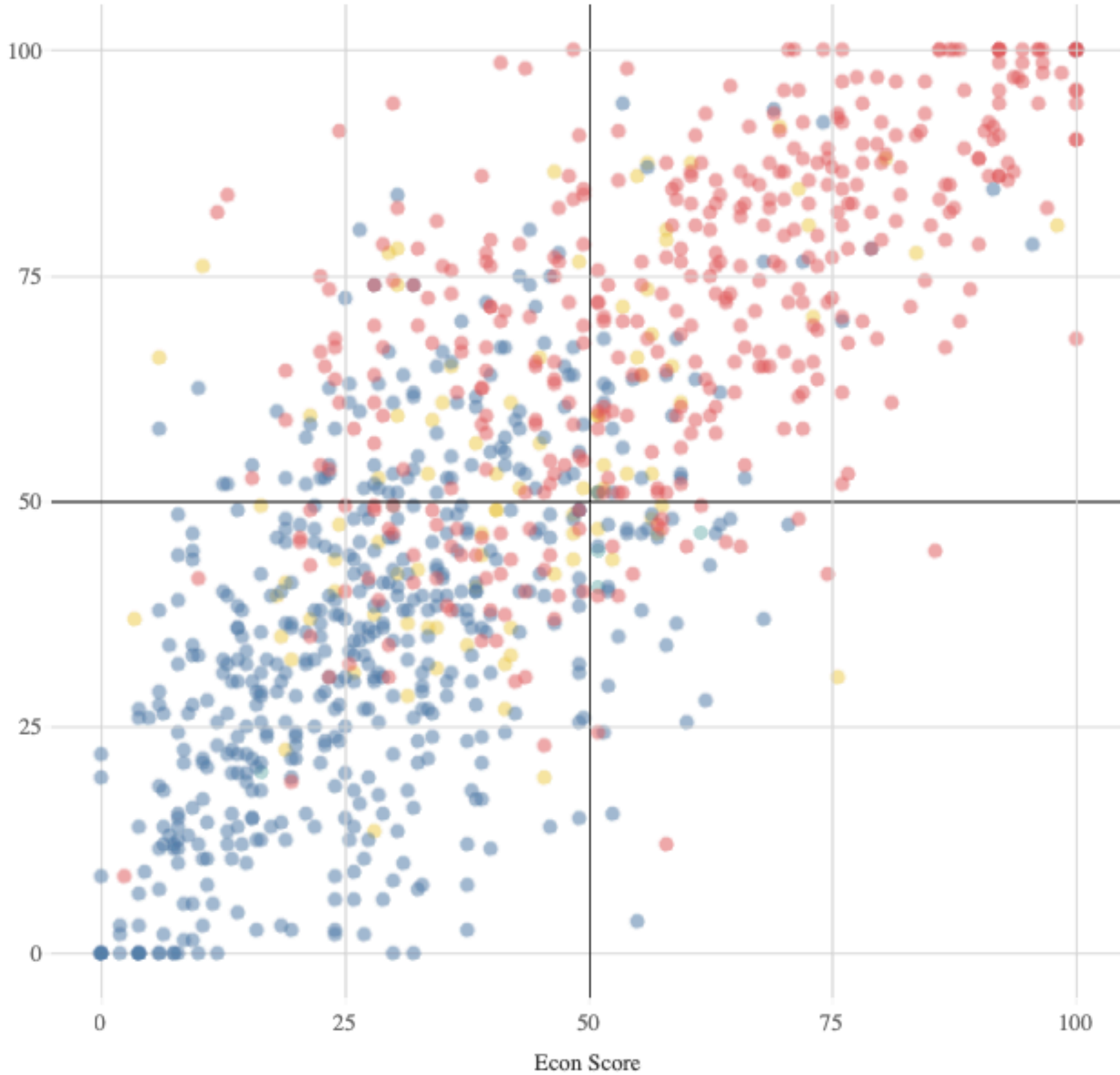
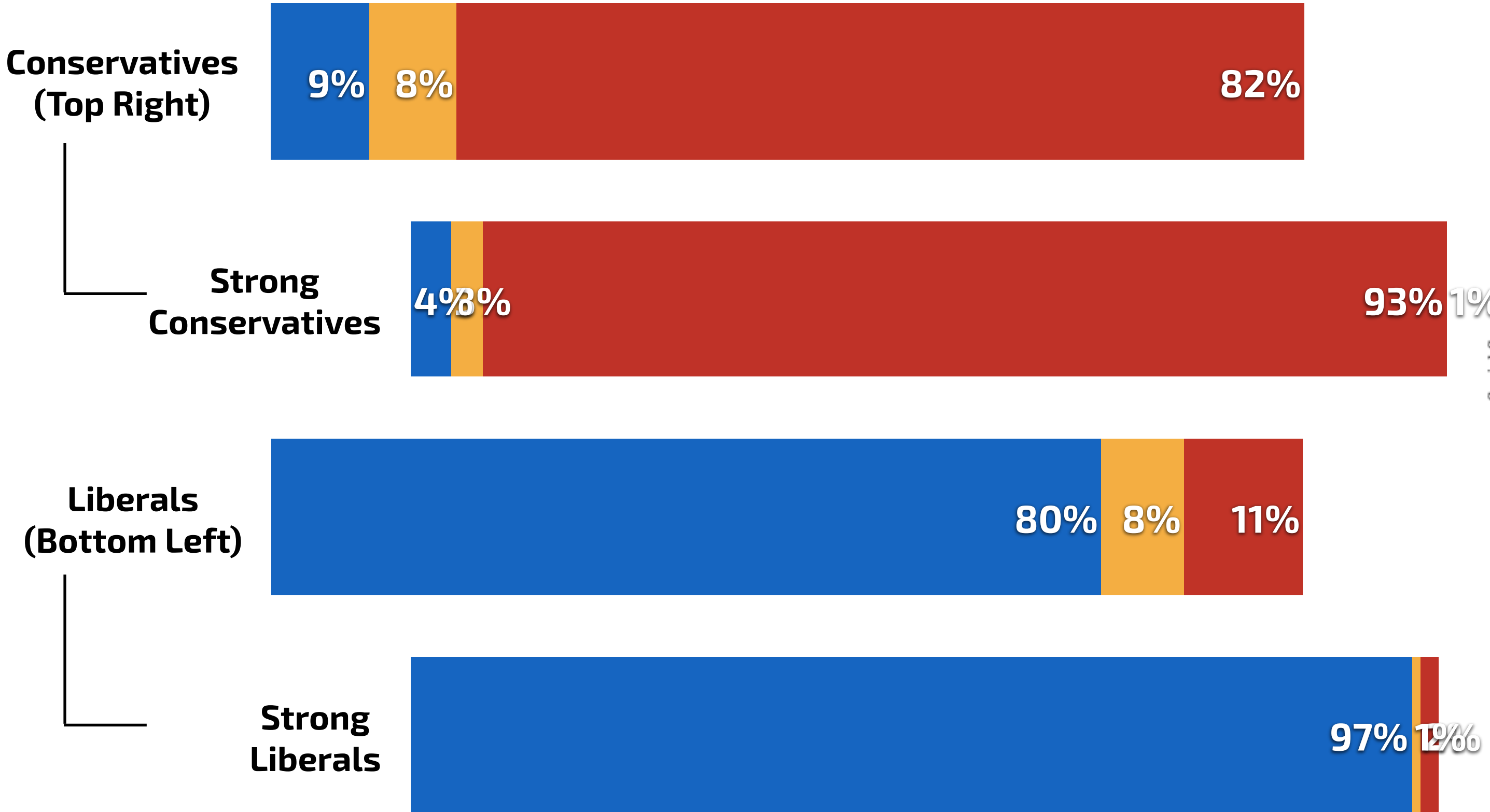
N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Plurality Of Populists Are Republicans



3% Of Strong Conservatives, 1% Of Strong Liberals Consider Themselves Independents

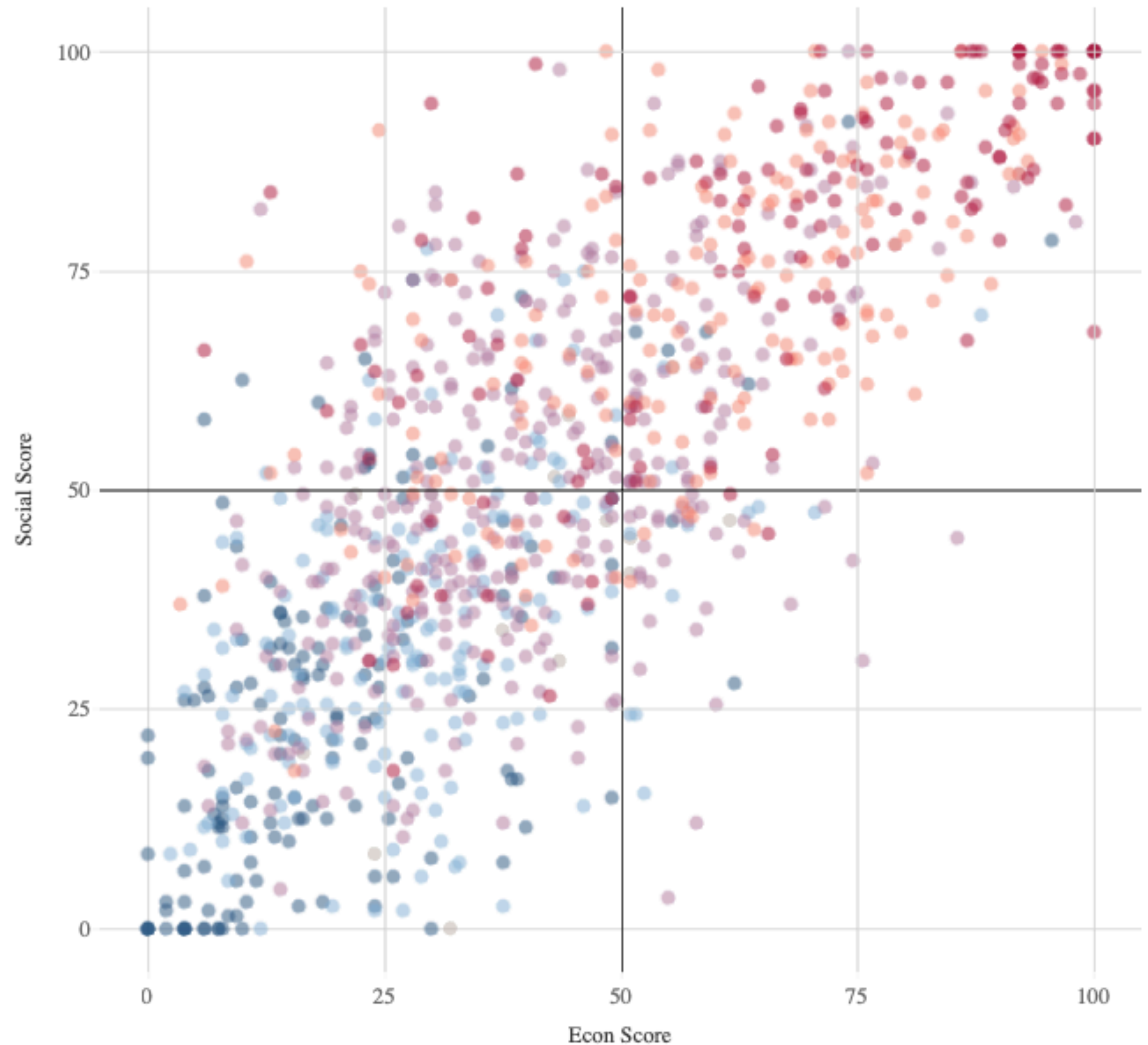
■ Dem+Lean
 ■ Independent
 ■ GOP+Lean
 ■ Other



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

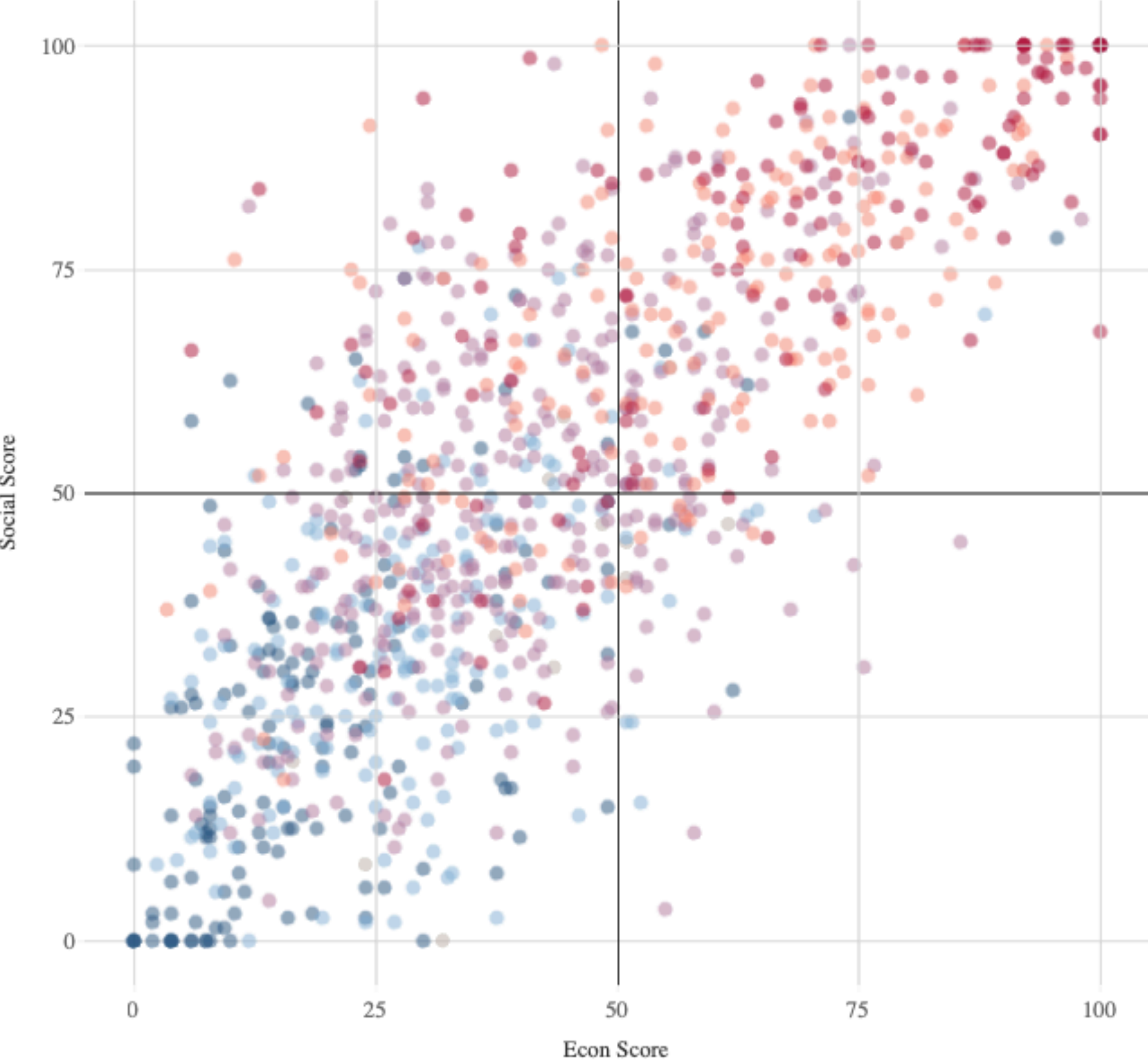
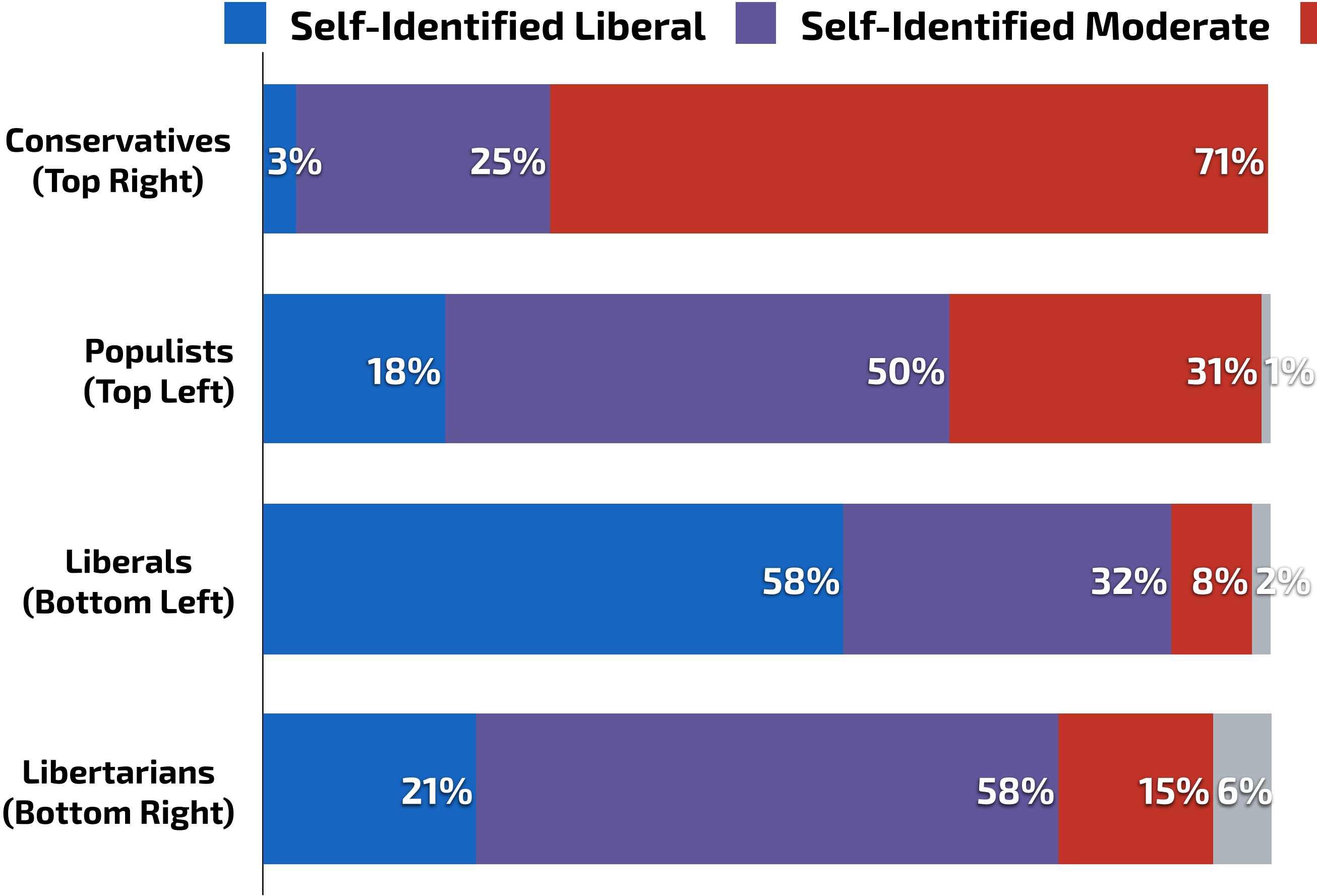
Political Ideology

- Over 70% of Conservatives identify as ideologically conservative, while only 58% of Liberals identify as ideologically liberal.
- A plurality of populists identify as moderates, as do around about a quarter of Conservatives and Liberals.



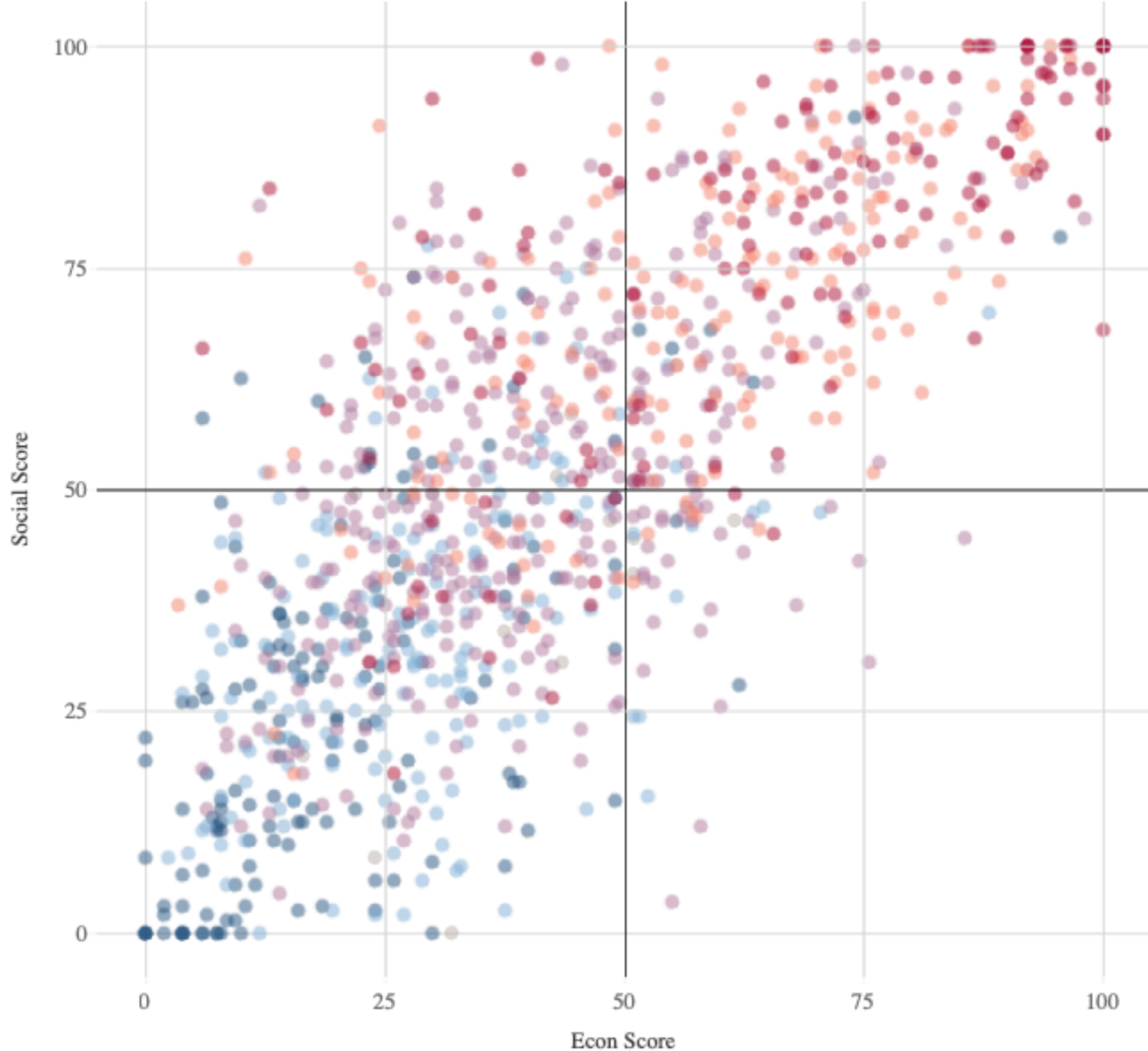
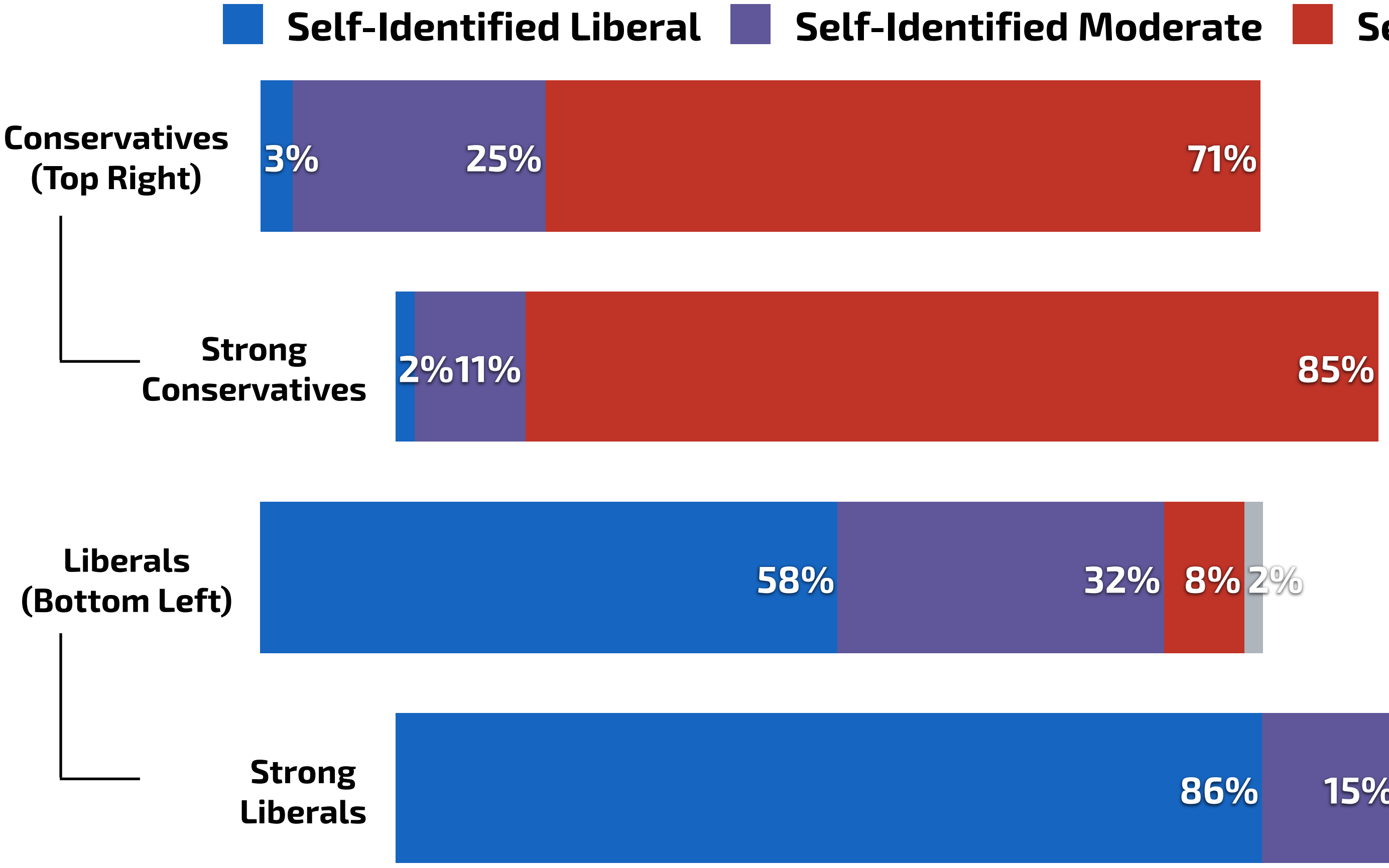
N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Plurality Of Populists Identify As Ideologically Moderate, But More Conservatives (31%) Than Liberals (18%) Do As Well



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

11% Of Strong Conservatives And 15% Strong Liberals Identify As Ideologically Moderate



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

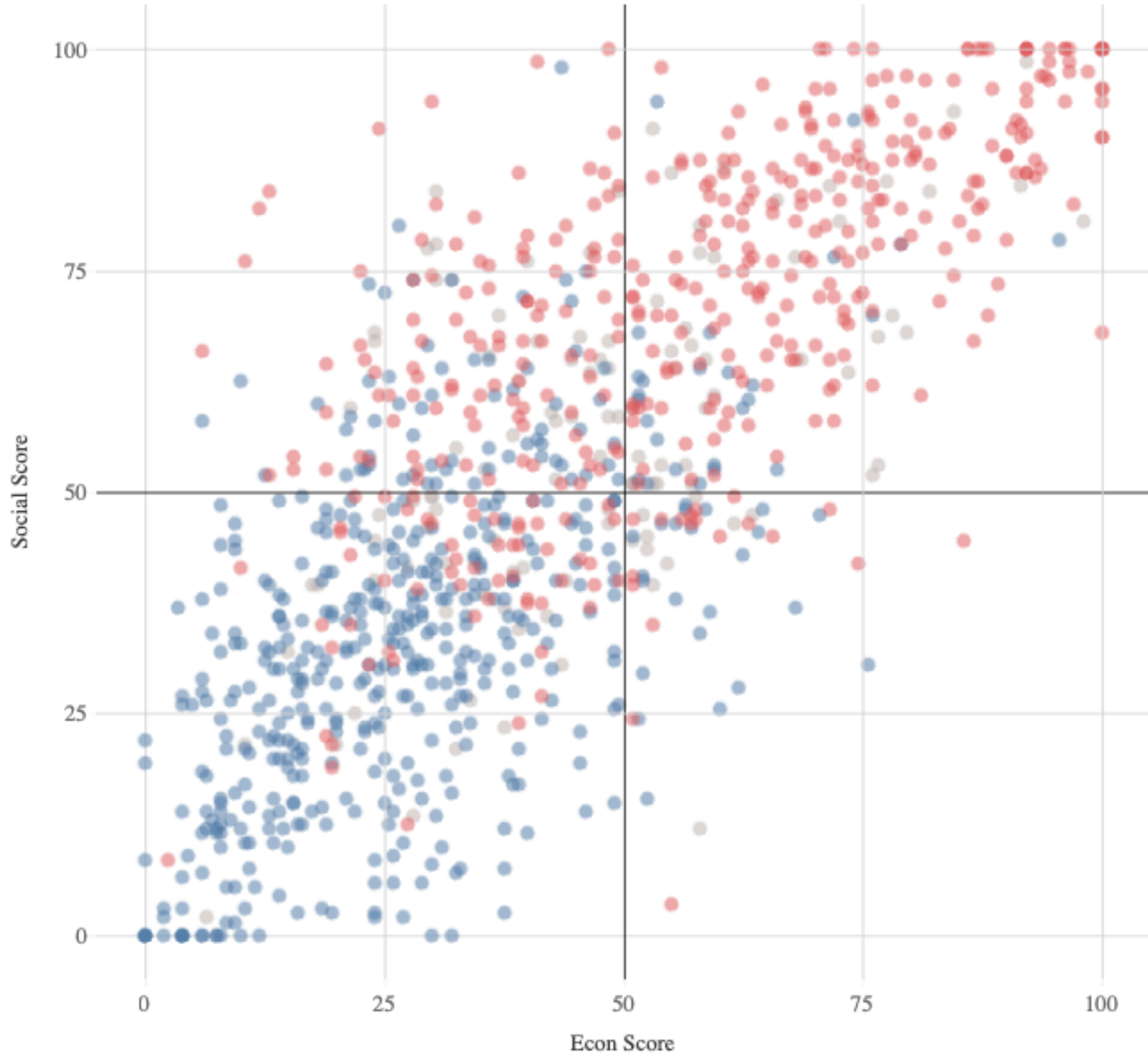
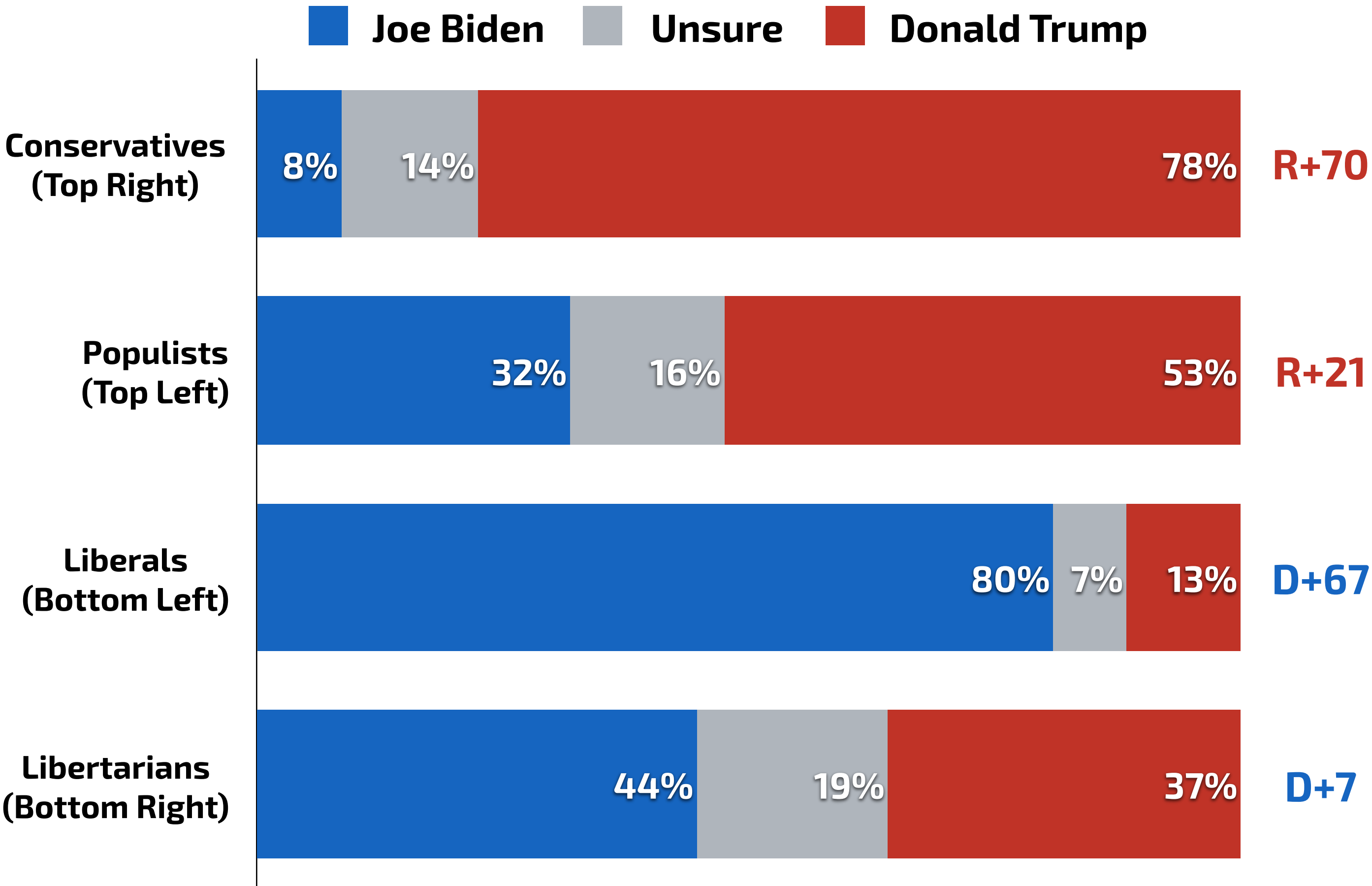
2024 Presidential Election

- Trump gains a hefty 21-point margin with populists in a hypothetical 2024 rematch with Biden, but loses out the Libertarian quadrant by 7-point margin.
- Trump performs worse with Strong Conservatives than Biden does with Strong Liberals, suggesting Biden has consolidated the most ideologically progressive faction.



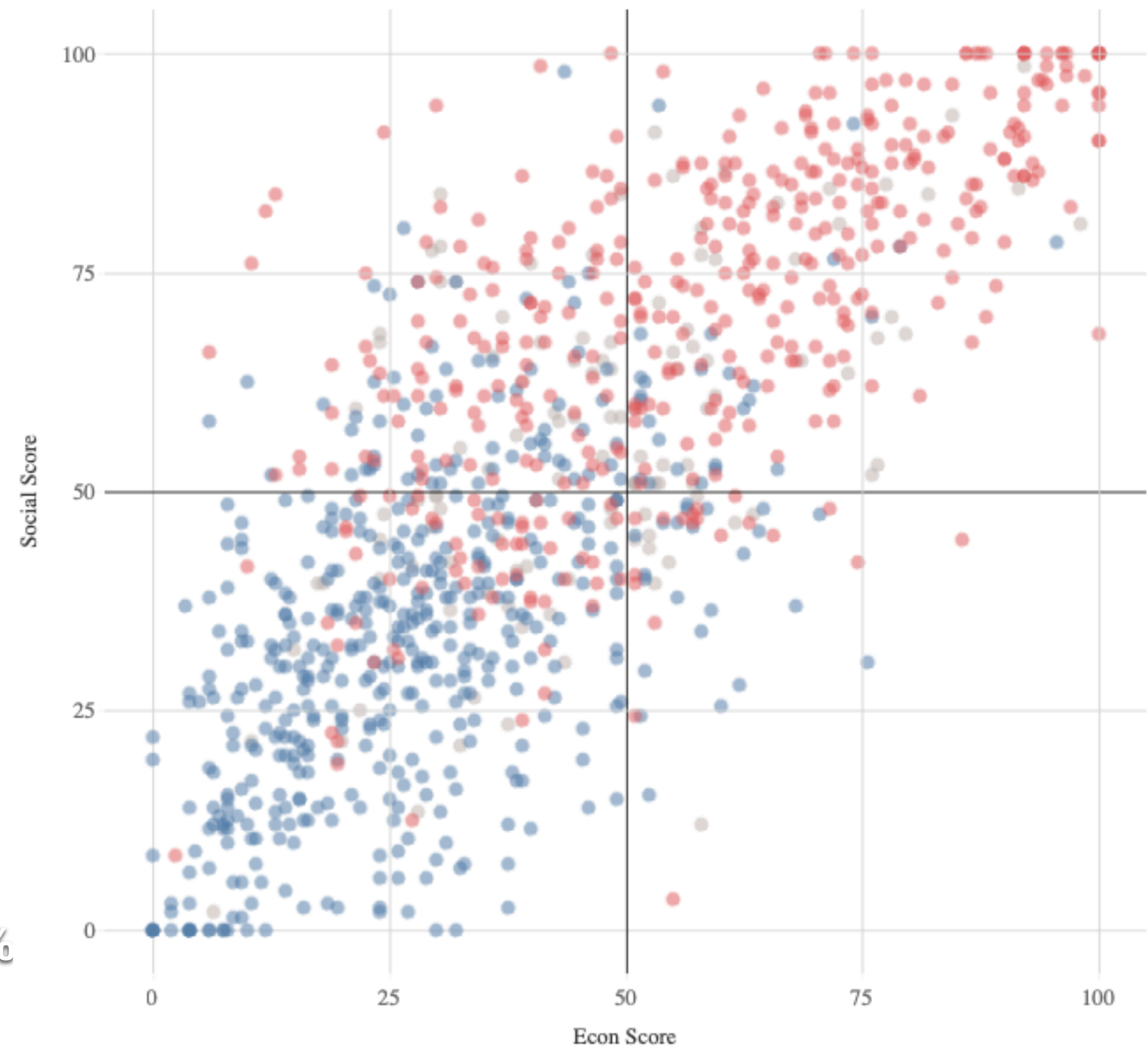
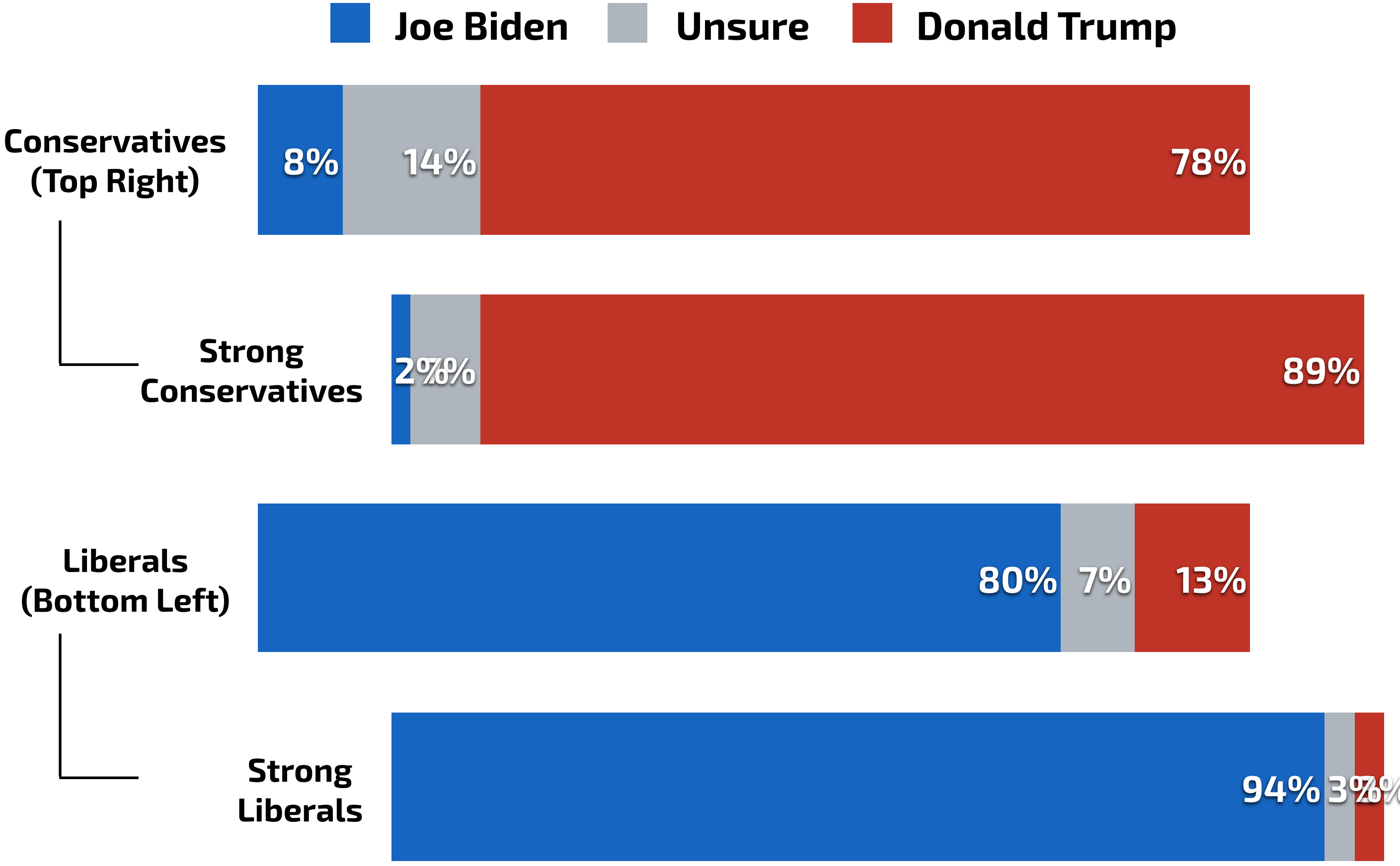
N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Trump Leads Populists by 21 Points in a 2024 Rematch



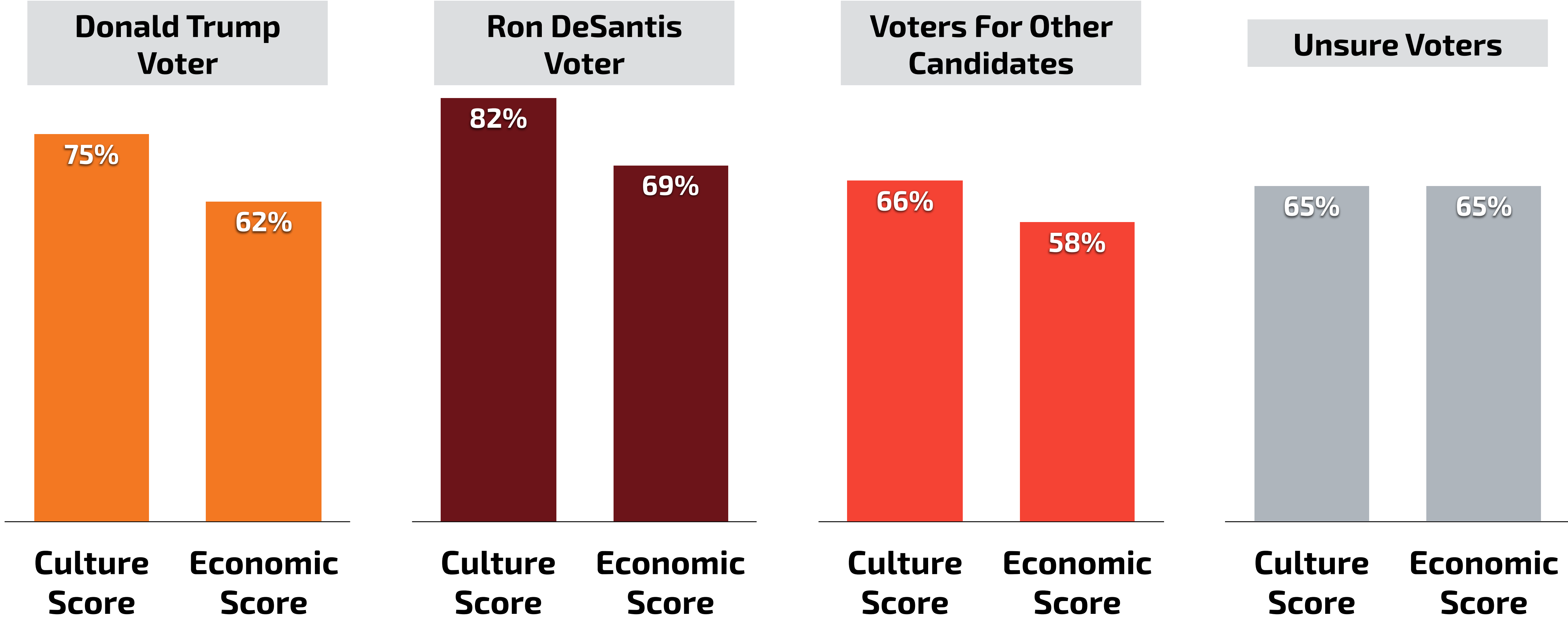
N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Trump 2024 Does Worse With Strong Conservatives Than Biden 2024 Does With Strong Liberals



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

When Answering The Political Quadrant Test, DeSantis Primary Voters Score A Bit More Conservative On Average For Both Metrics



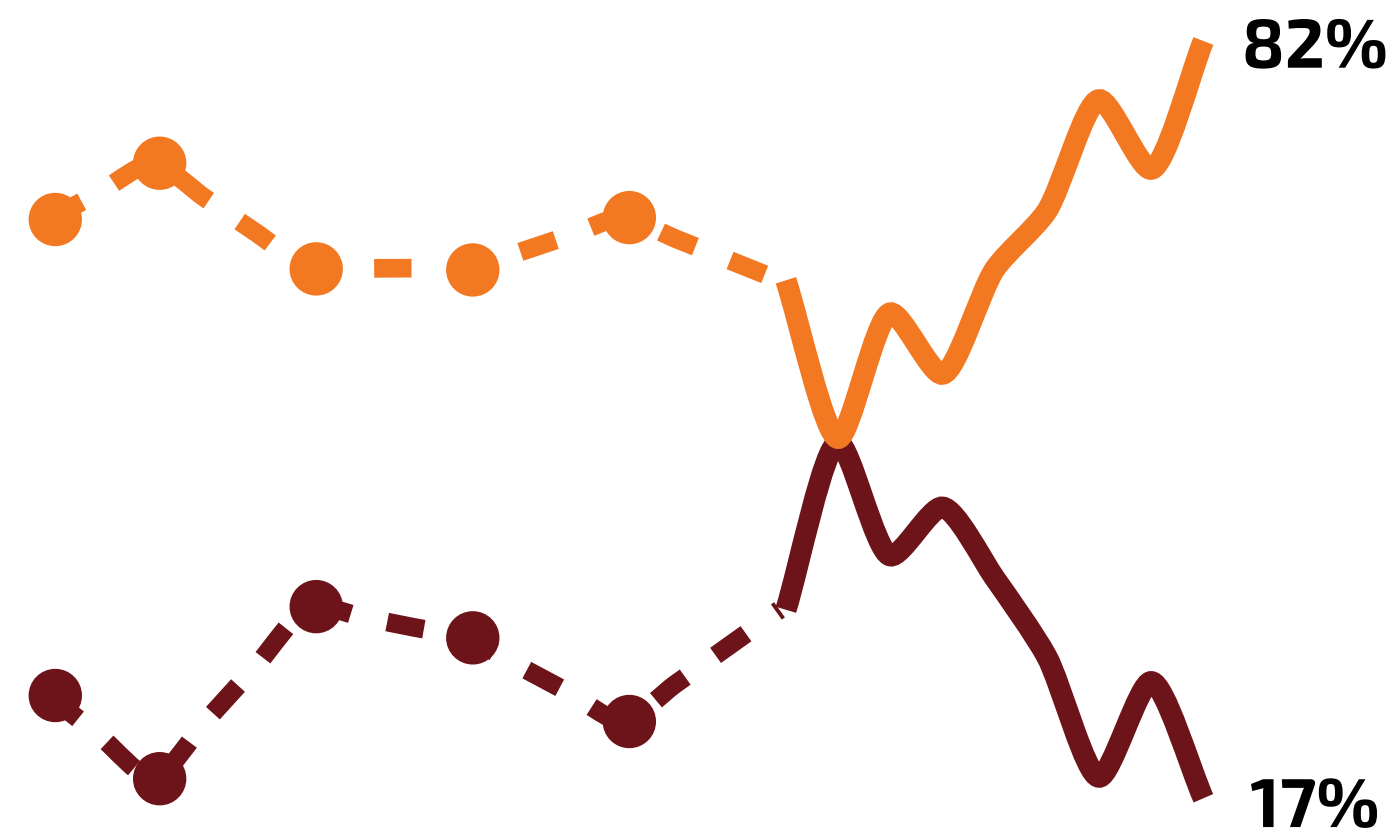
N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023
[% AMONG GOP+LEAN VOTERS]

Note: Candidates polling under 5%, Someone Else, and Unsure not included.

Recent Shift Towards Trump is Driven by Very Conservative Republicans, Who Are the Most Volatile in Their Voting Intentions

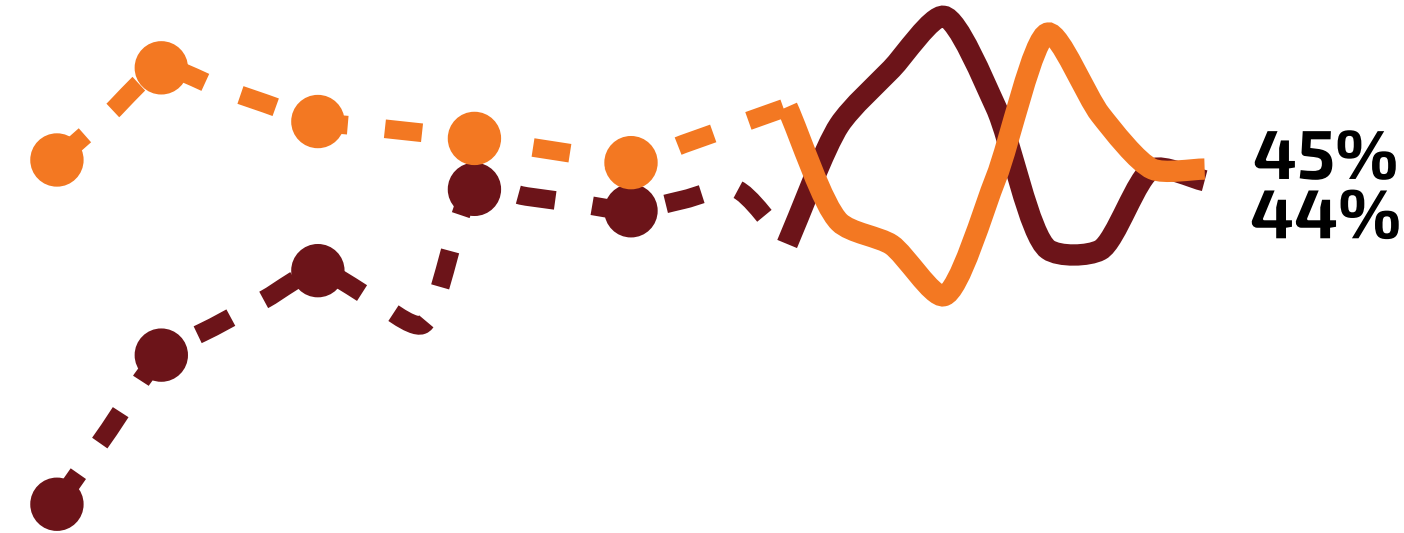
— Donald Trump — Ron DeSantis

Very Conservative



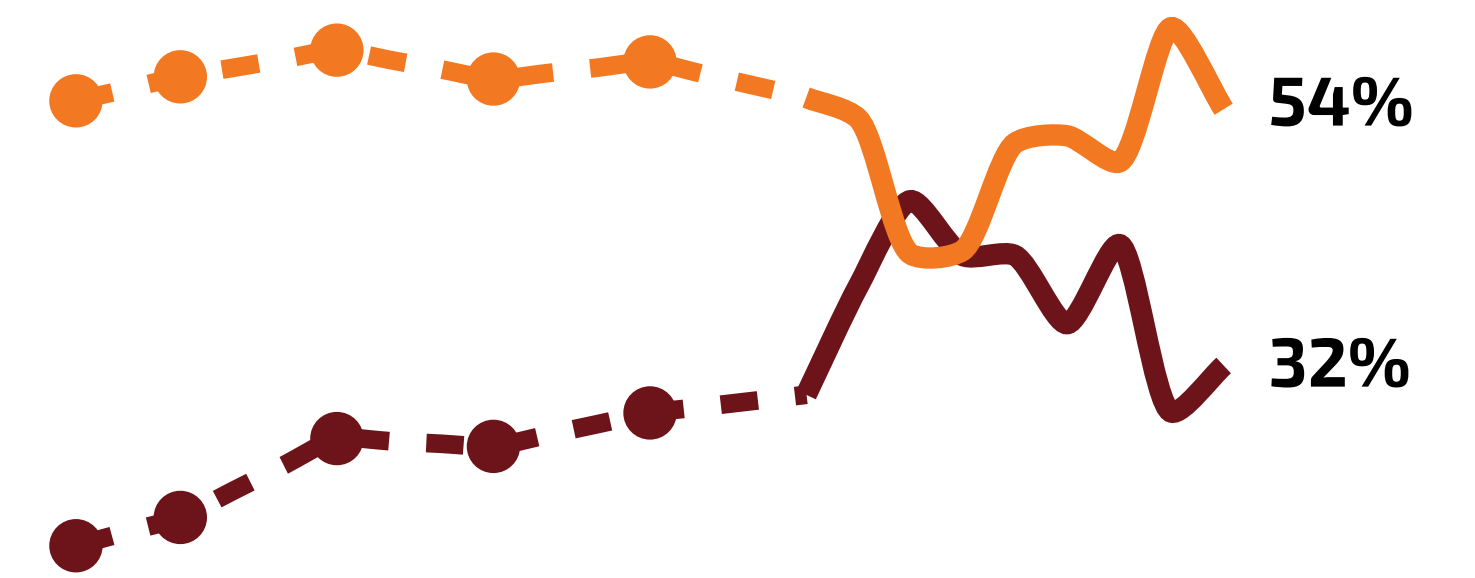
Aug. 21 Apr. 22 Dec. 22 June 23

Somewhat Conservative



Aug. 21 Apr. 22 Dec. 22 June 23

Moderate/Liberal



Aug. 21 Apr. 22 Dec. 22 June 23



Q. If the 2024 Republican presidential primaries were being held today and you had to make a choice, for whom would you vote? [%AMONG GOP+LEAN, UNSURE REMOVED]

N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: Surveys prior to March 2022 were of Registered Voters, not weighted to Likely Electorate

Trump Performs Best With Republicans Who Identify As Very Conservative But Don't Score It; DeSantis Performs Best With The Exact Opposite

	SELF-ID	Very Conservative		NOT Very Conservative	
		Consistently Conservative	NOT Consistently Conservative	Consistently Conservative	NOT Consistently Conservative
	SCORE				
Donald Trump	49%	69%	78%	25%	38%
Ron DeSantis	16%	13%	10%	39%	14%
Vivek Ramaswamy	10%	12%	4%	5%	12%
Mike Pence	5%	1%	2%	4%	8%
Nikki Haley	5%	2%	2%	2%	7%



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023
 [% AMONG GOP+LEAN VOTERS]






Note: Candidates polling under 5%, Someone Else, and Unsure not included.

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	SUPPORT	DESCRIPTION
NATIONALIST		26%	Stop illegal immigration, put America First, stand up to political correctness, and end unfair trade deals
CONSERVATIVE		18%	Defend the American system of free enterprise, promote traditional family values, and ensure a strong military
ACELA		11%	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		31%	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%	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

N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: Unsure not included

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.

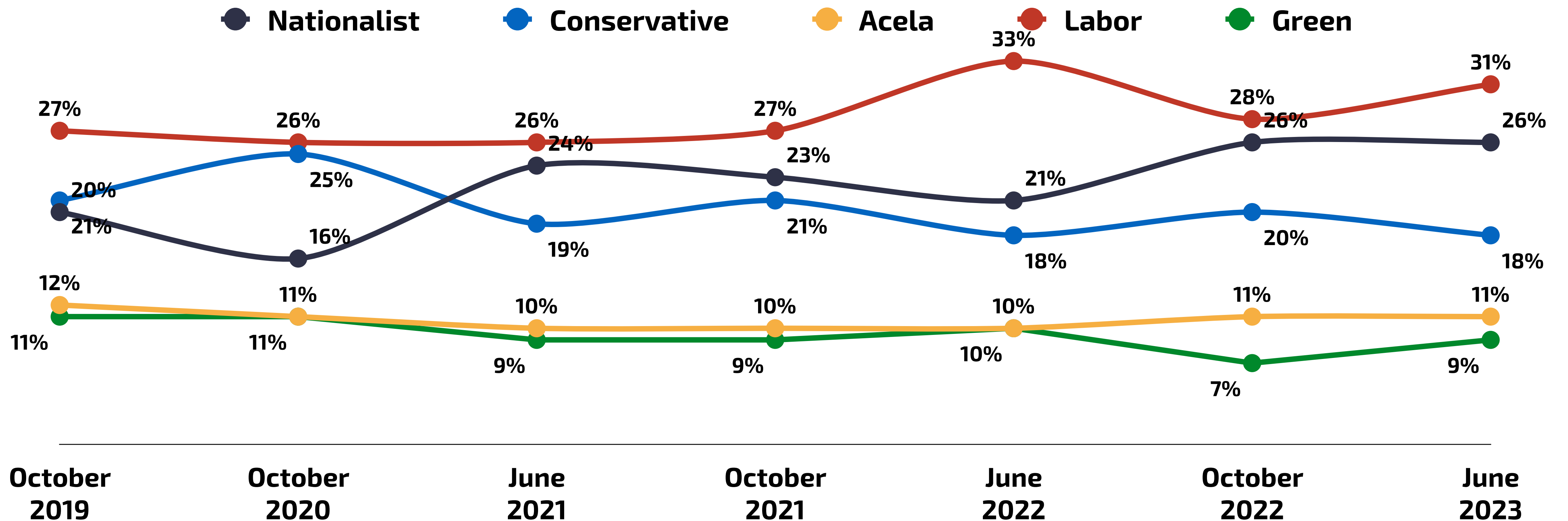
PARTY	LEADER	JUNE 2023 LV	OCTOBER 2022 LV	CHANGE	DESCRIPTION
NATIONALIST		26%	26%	EVEN	Stop illegal immigration, put America First, stand up to political correctness, and end unfair trade deals
CONSERVATIVE		18%	20%	-2	Defend the American system of free enterprise, promote traditional family values, and ensure a strong military
ACELA		11%	11%	EVEN	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		31%	28%	+3	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%	7%	+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

N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: Unsure not included

Labor Party Still Receives A Plurality Of Support (31%)

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



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Note: October 2020, October 2022, and June 2023 survey are weighted to the Likely Electorate, all others are weighted to Registered Voters. Unsure not included.

Demographics Of America's Multi-Party Democracy

	Registered Voters	Green	Labor	Acela	Conservative	Nationalist
Gender	46% male 53% female	42% male 57% female	45% male 55% female	32% male 66% female	60% male 40% female	49% male 51% female
Age	43% under 50 57% 50+	62% under 50 38% 50+	44% under 50 56% 50+	70% under 50 30% 50+	37% under 50 63% 50+	34% under 50 66% 50+
Race	69% White 14% Black 12% Hispanic/Latino	60% White 25% Black 2% Hispanic/Latino	61% White 16% Black 14% Hispanic/Latino	59% White 14% Black 22% Hispanic/Latino	76% White 10% Black 11% Hispanic/Latino	82% White 6% Black 12% Hispanic/Latino
Income	46% <\$50k/yr 54% >\$50k/yr	47% <\$50k/yr 48% >\$50k/yr	39% <\$50k/yr 59% >\$50k/yr	50% <\$50k/yr 50% >\$50k/yr	48% <\$50k/yr 51% >\$50k/yr	46% <\$50k/yr 52% >\$50k/yr
Urbanicity	28% City 43% Suburb 29% Small town/rural	33% City 39% Suburb 28% Small town/rural	33% City 43% Suburb 23% Small town/rural	30% City 40% Suburb 26% Small town/rural	24% City 42% Suburb 34% Small town/rural	22% City 40% Suburb 37% Small town/rural
Education	61% Non-College 39% College	54% Non-College 45% College	60% Non-College 40% College	54% Non-College 46% College	59% Non-College 41% College	67% Non-College 33% College



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Cost of Living Is The Top Issue For Every Party But Greens, Who Pick Environment And Climate Change Above All

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

Green	Labor	Acela	Conservative	Nationalist
The environment and climate change (32%)	Cost of living (28%)	Cost of living (17%)	Cost of living (33%)	Cost of living (25%)
Jobs and the economy (18%)	Jobs and the economy (13%)	Gun rights (15%)	Political corruption (18%)	Immigration (18%)
Cost of living (16%)	Political corruption (12%)	Political corruption (11%)	Jobs and the economy (14%)	Jobs and the economy (16%)
Gun rights (6%)	Gun rights (9%)	The environment and climate change (10%)	Immigration (4%)	Political corruption (10%)

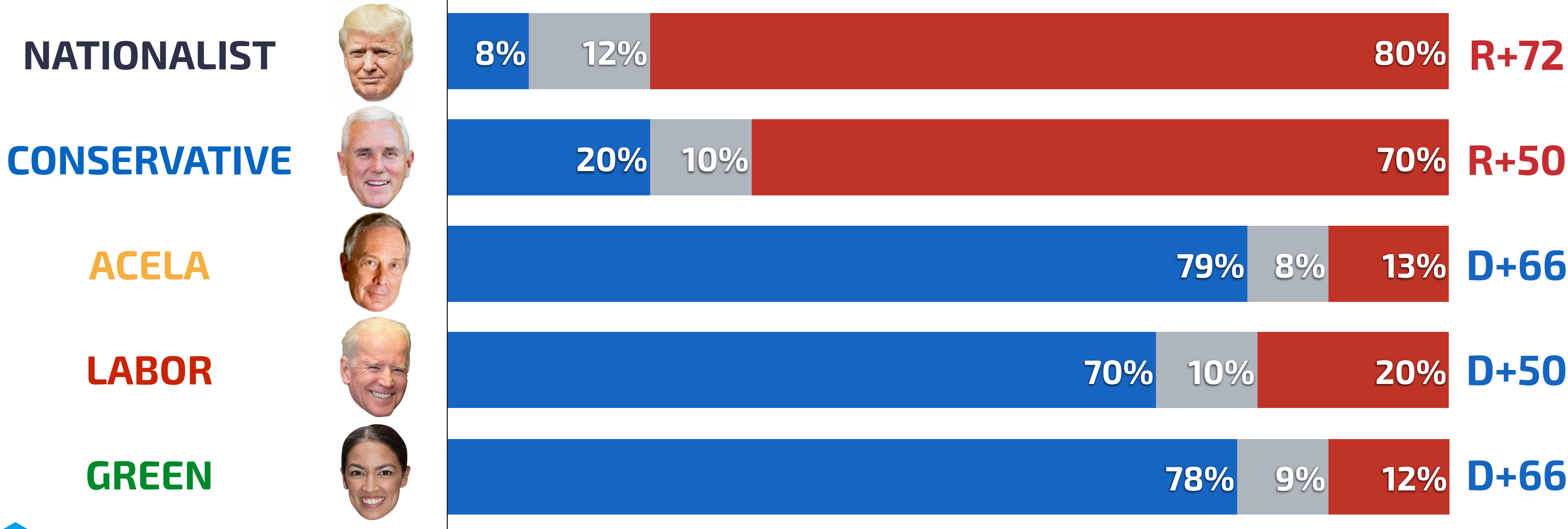


N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

20% of Traditional Conservatives Would Vote Biden

Q. If the 2024 presidential election were being held today, would you vote for...

■ Joe Biden
 ■ Unsure
 ■ Donald Trump

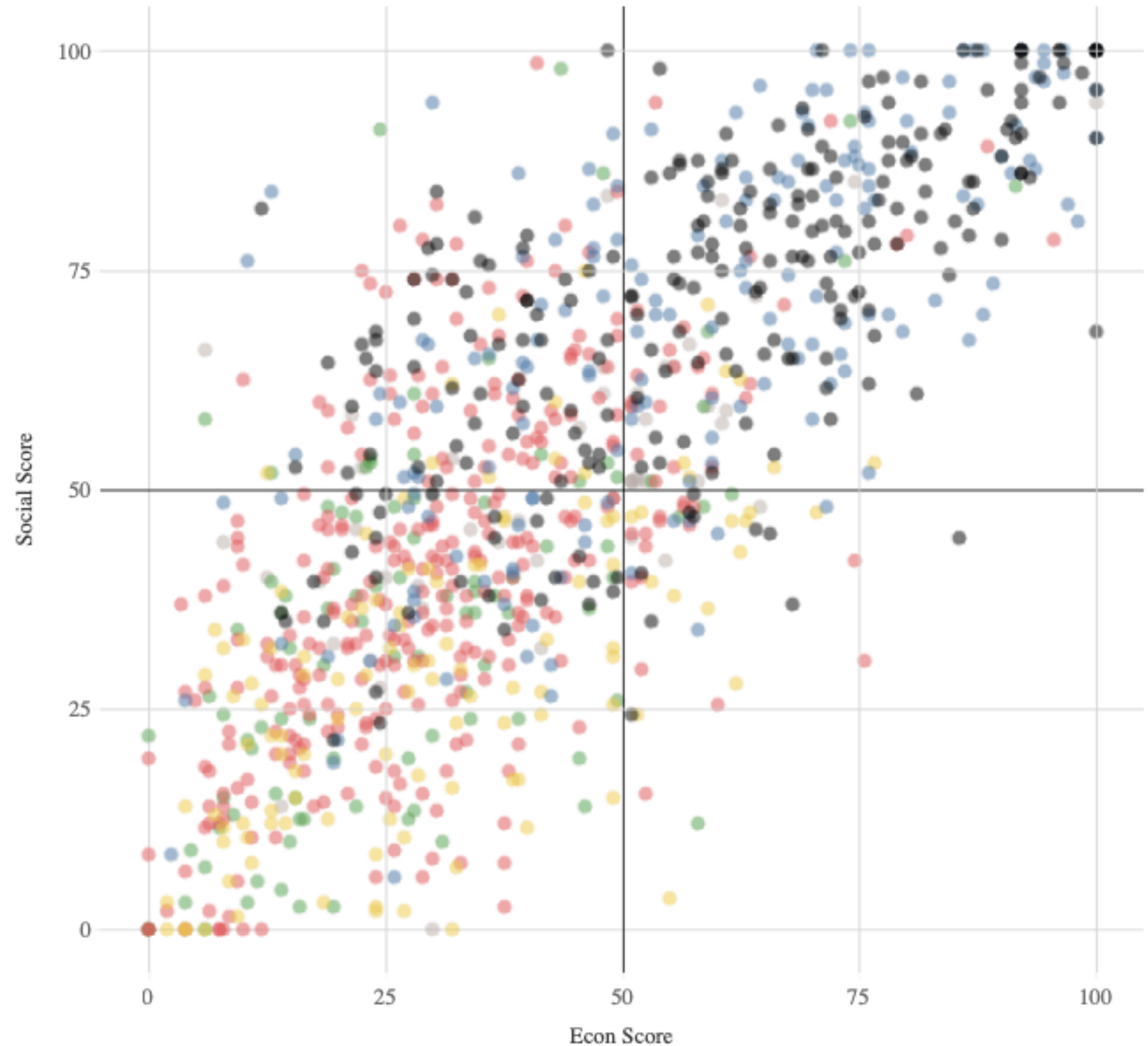


N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023



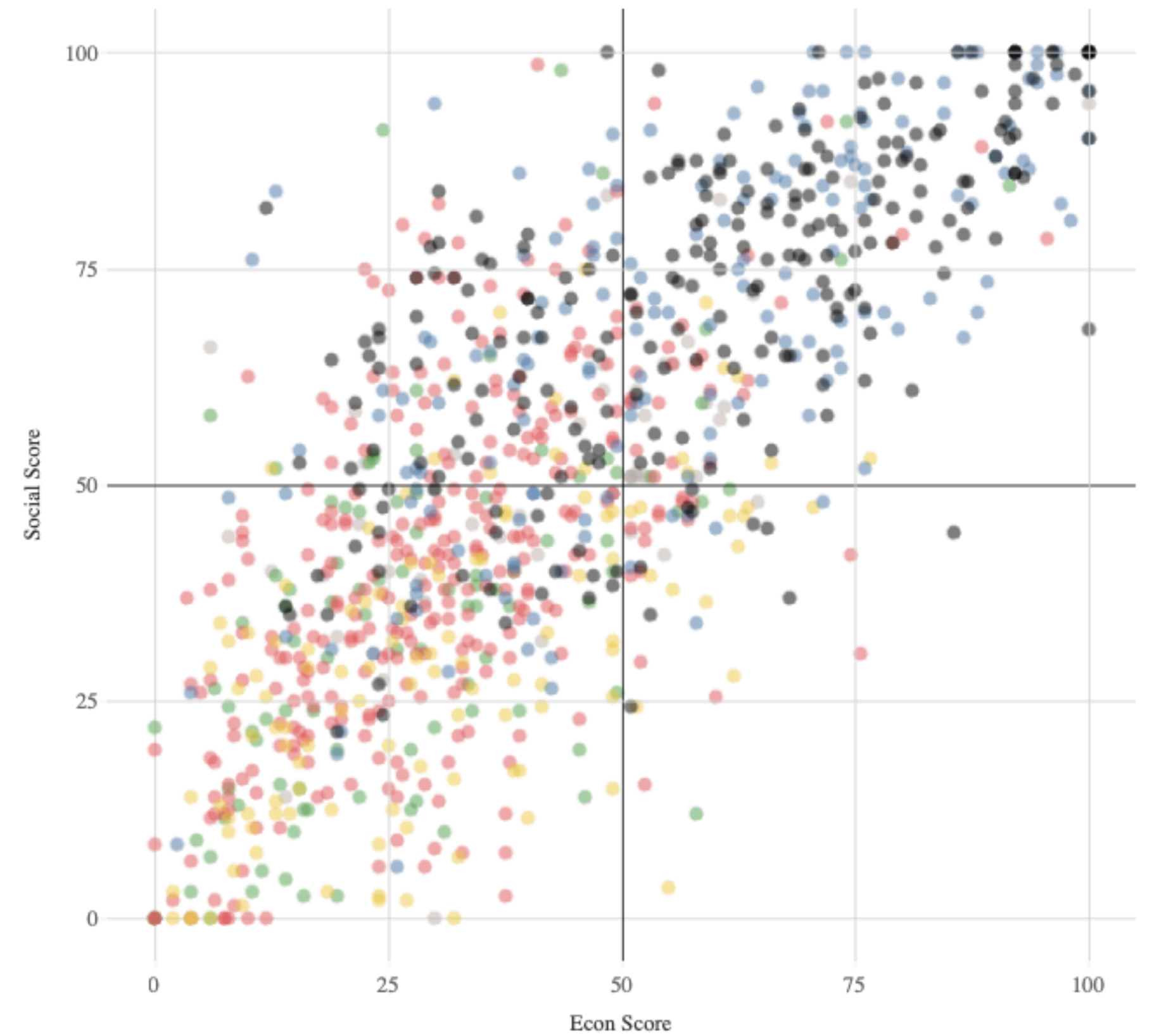
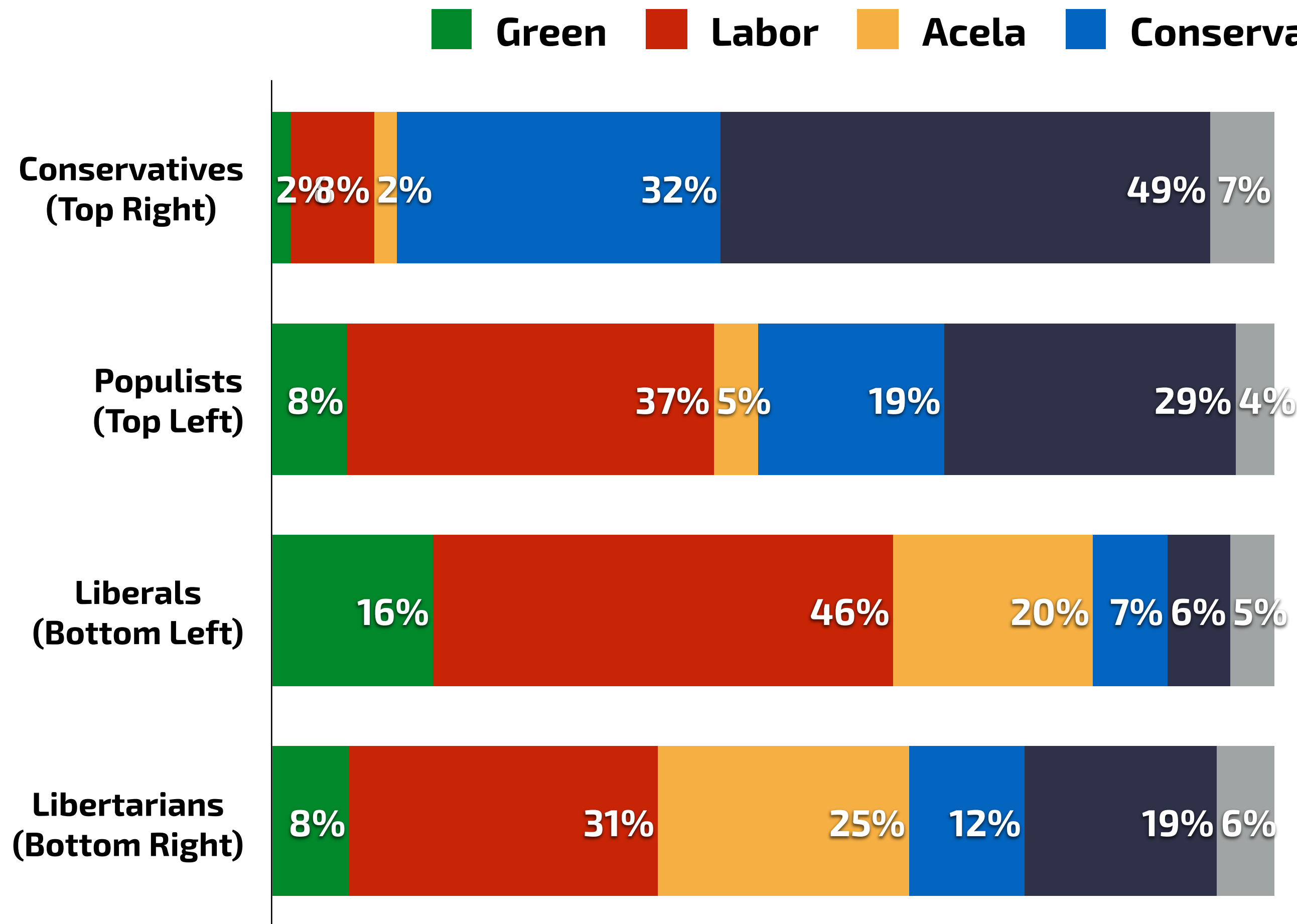
What If American Elections Had Five Parties Instead Of Two?

- Over 80% of the Conservative quadrant supports either the Nationalist or Conservative Party.
- Nearly half of the Liberal quadrant supports the Labor Party; the Acela Party comes in second place with 20%.
- 37% of Populists are support the Labor Party, about equal to the combined support of the Conservative and Nationalist Parties in the quadrant.



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Populists Split Between Center-Left And Center-Right Parties

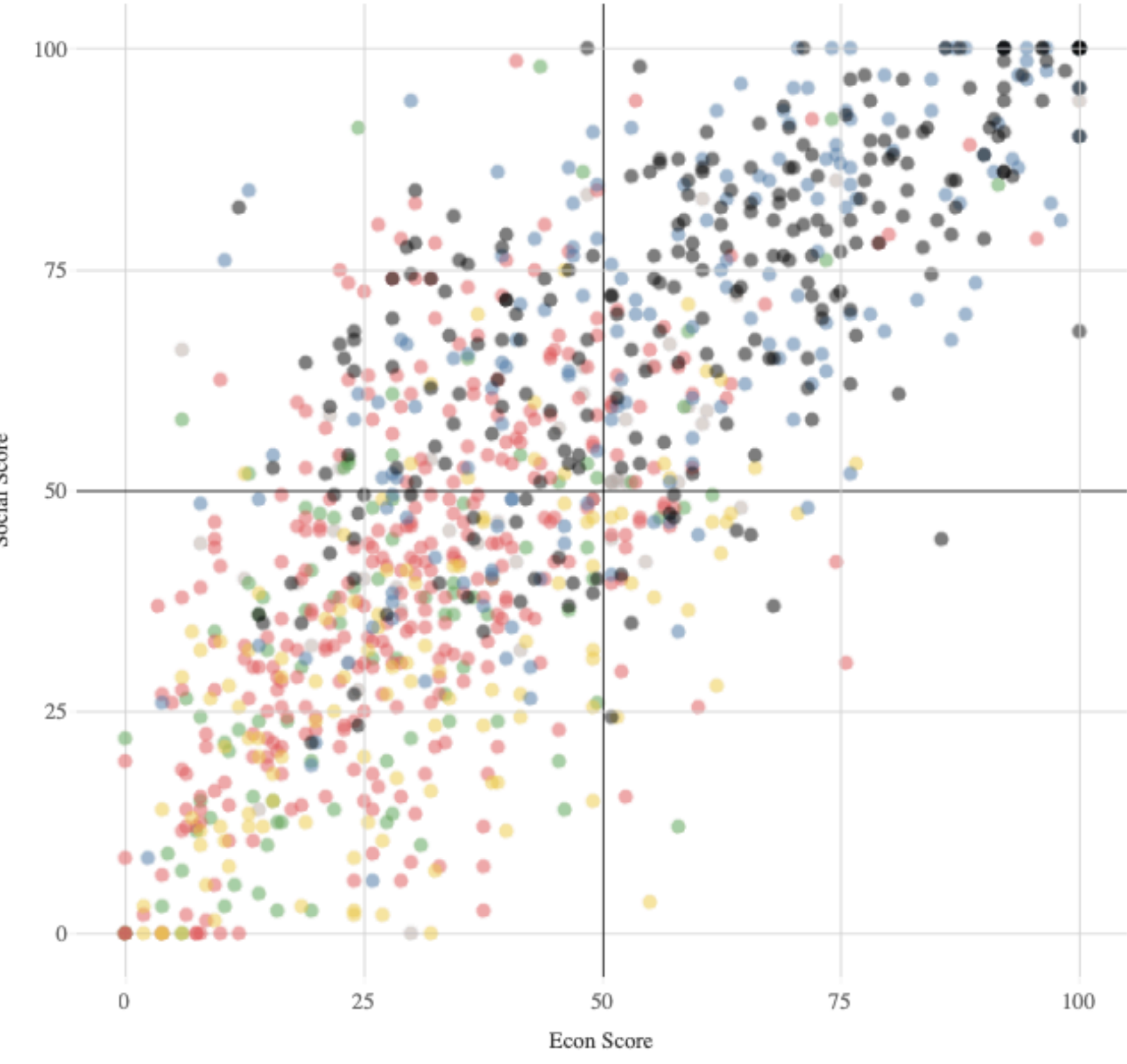
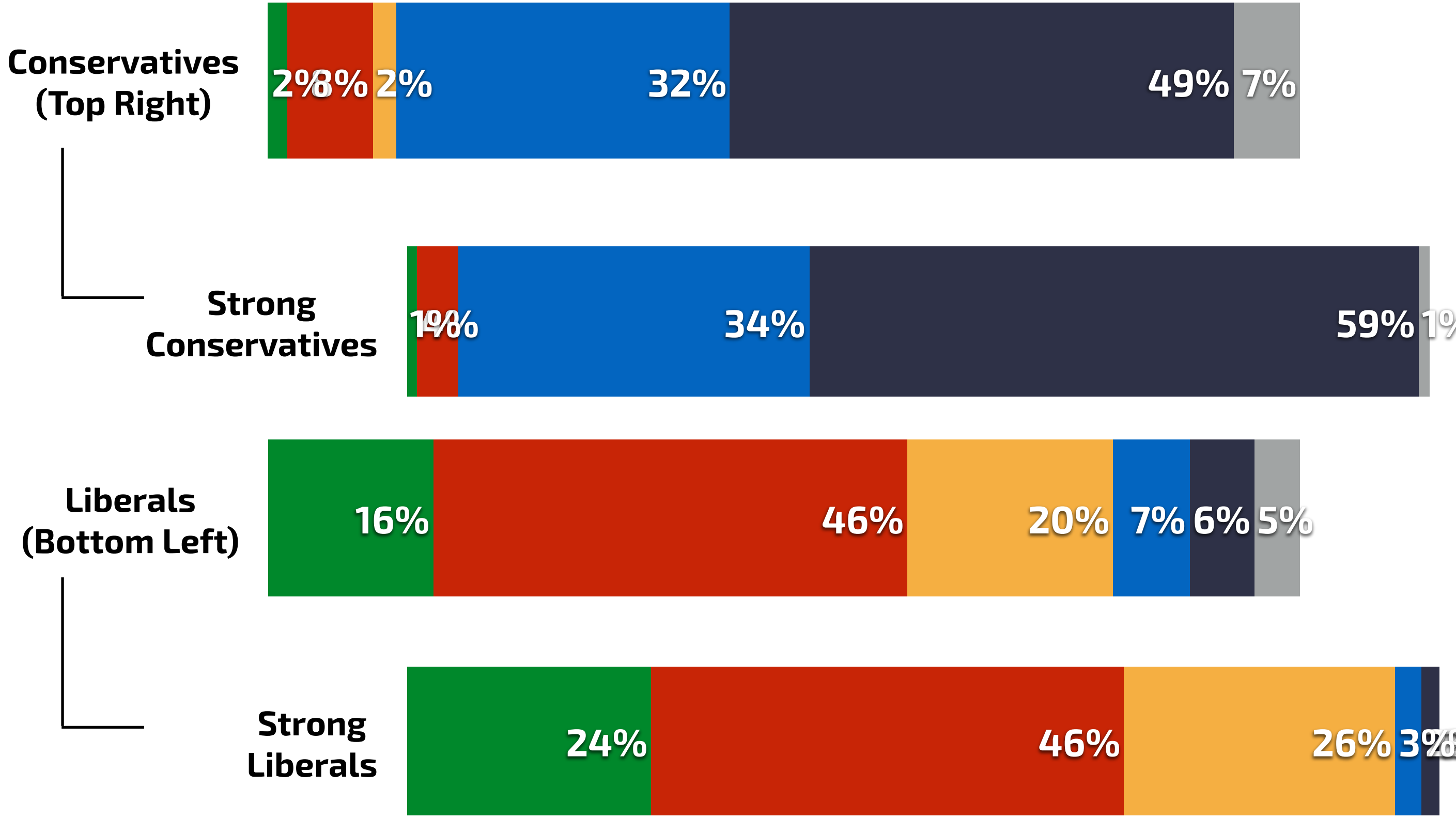


N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023



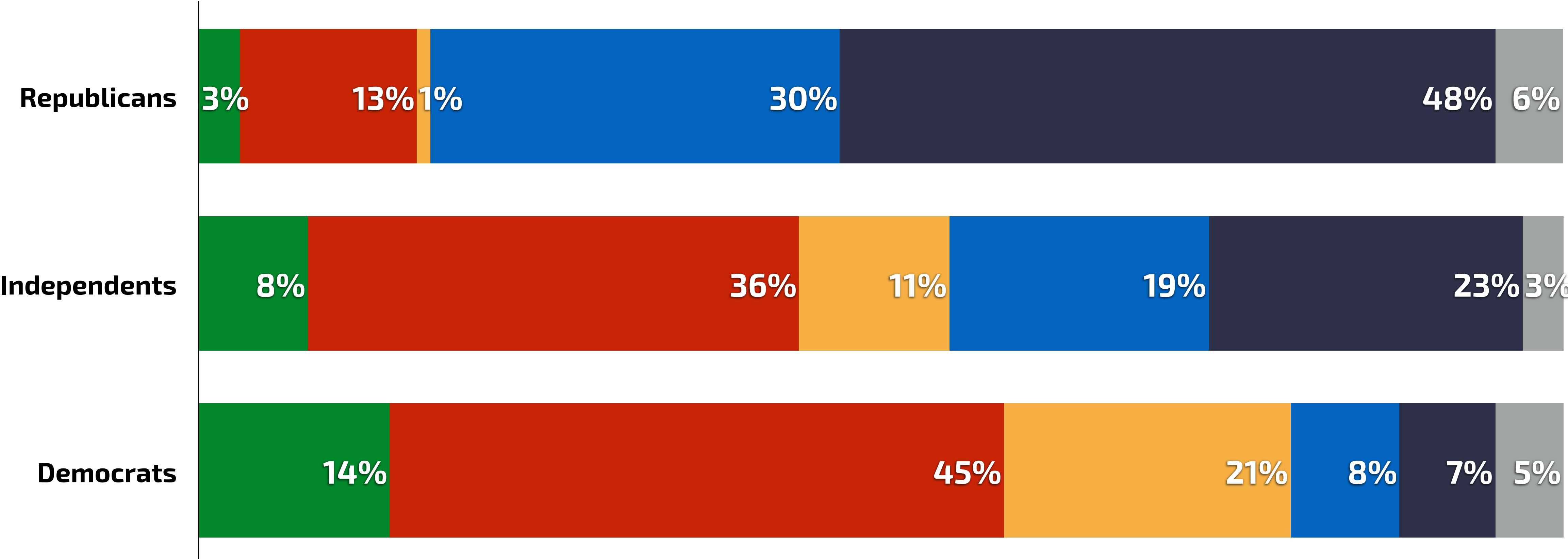
Strong Liberals Lean More Green And Acela Than Liberals Overall, While Over Half Of Strong Conservatives Support The Nationalist Party

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



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

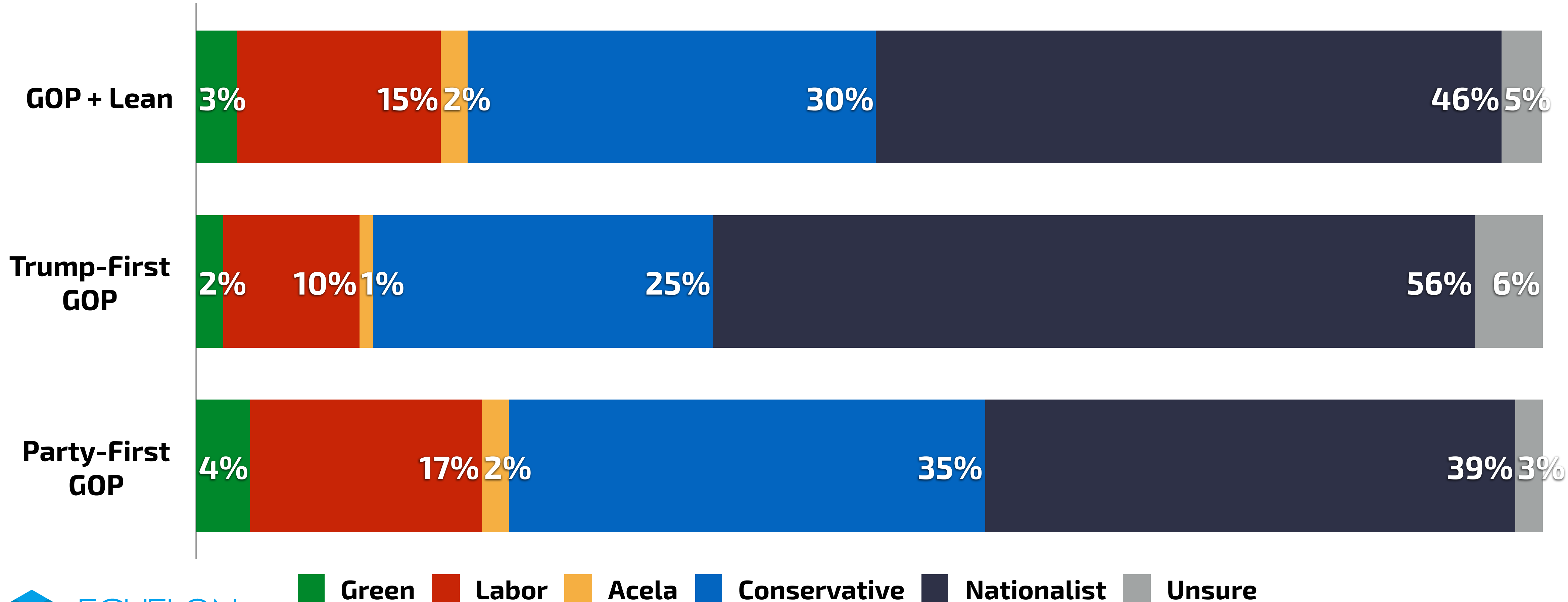
Nationalist Party Wins Among GOP, Labor With Democrats And Independents



Green Labor Acela Conservative Nationalist Unsure

N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

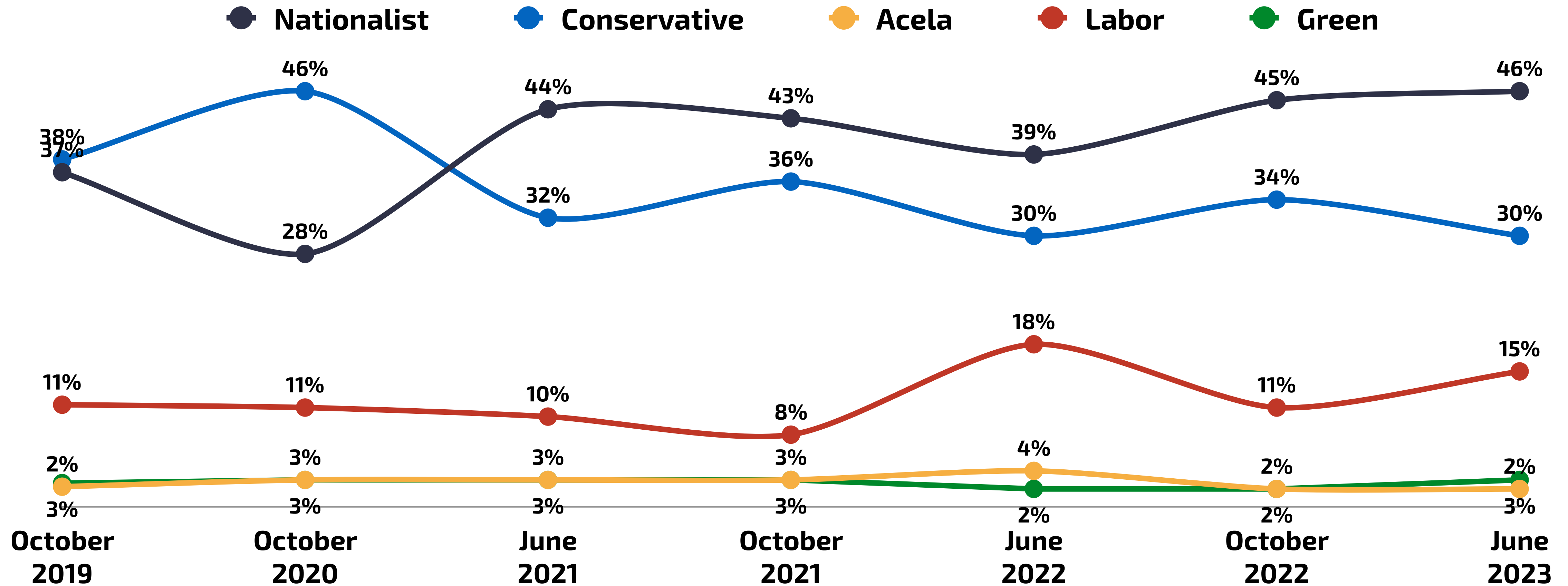
Trump-First Republican-Leaning Voters Are More Nationalist While Party-First Are More In Favor Of Conservative and Labor Party Options



N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Nationalist Party Support Among GOP Reaches New High

Among GOP + Lean Voters

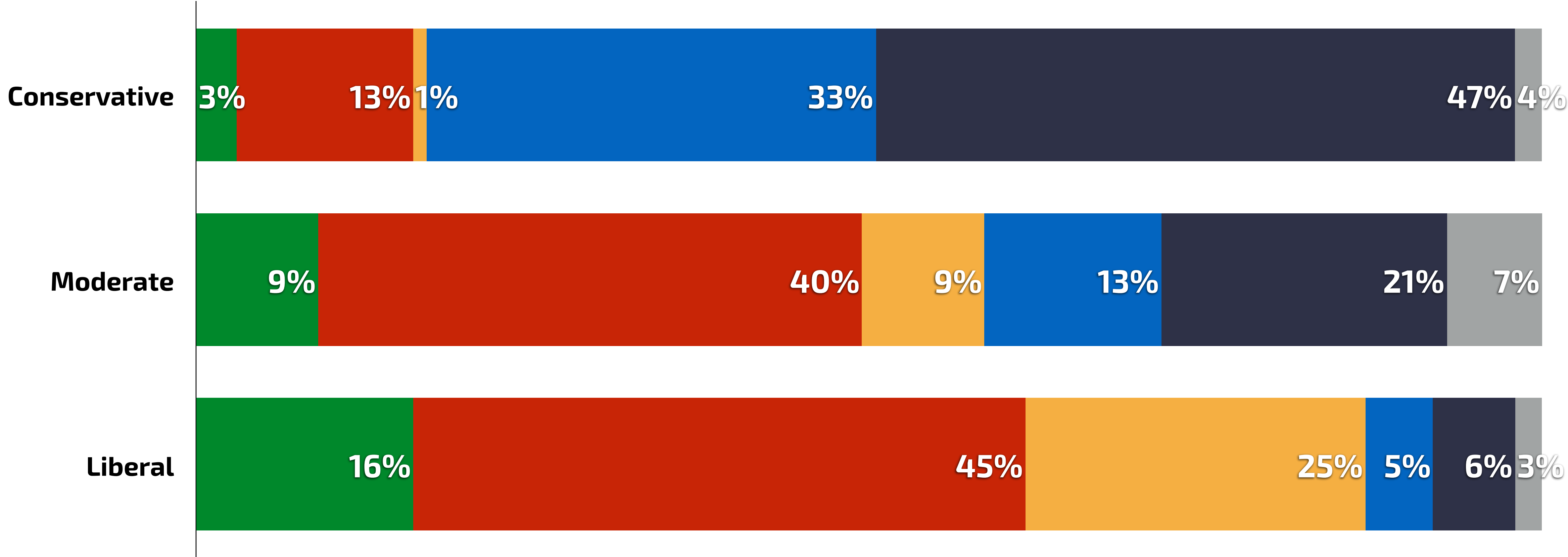


N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023
 [% AMONG GOP+LEAN VOTERS]

Note: October 2020, October 2022, and June 2023 survey are weighted to the Likely Electorate, all others are weighted to Registered Voters. Unsure not included.



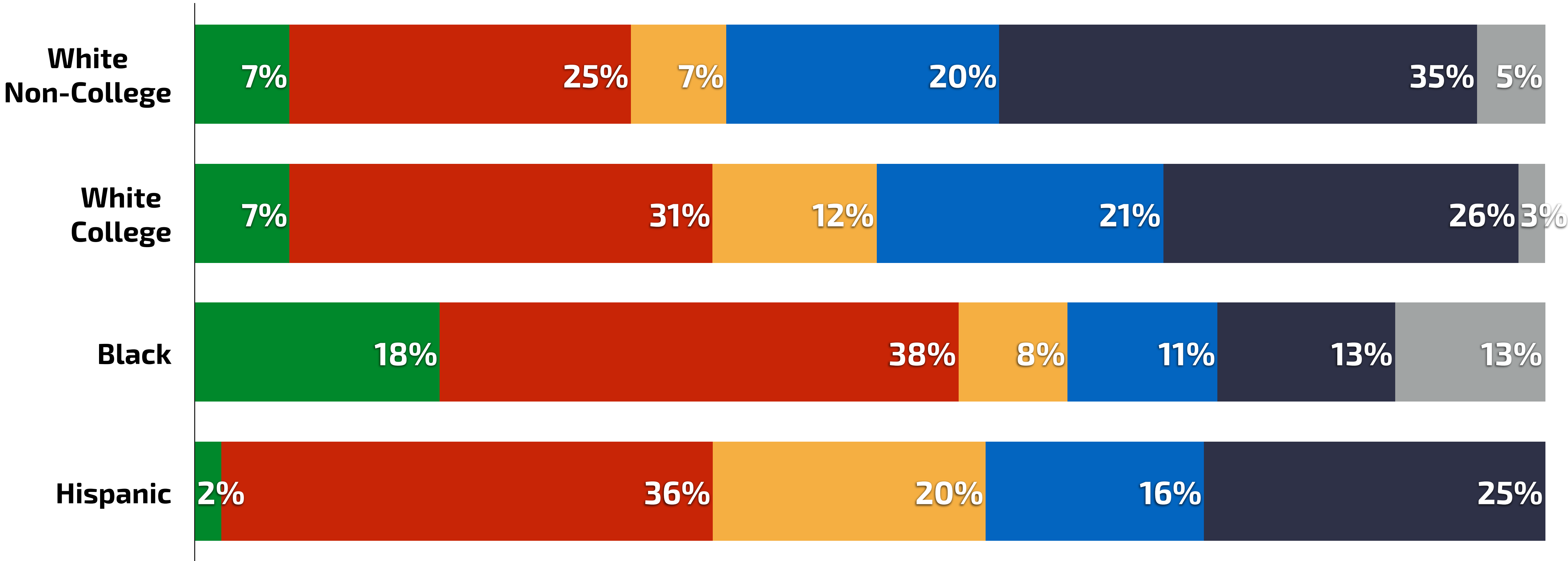
Voters Who Identify As Ideologically Moderate Choose Labor Party At Roughly The Same Rate As Liberals



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

N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

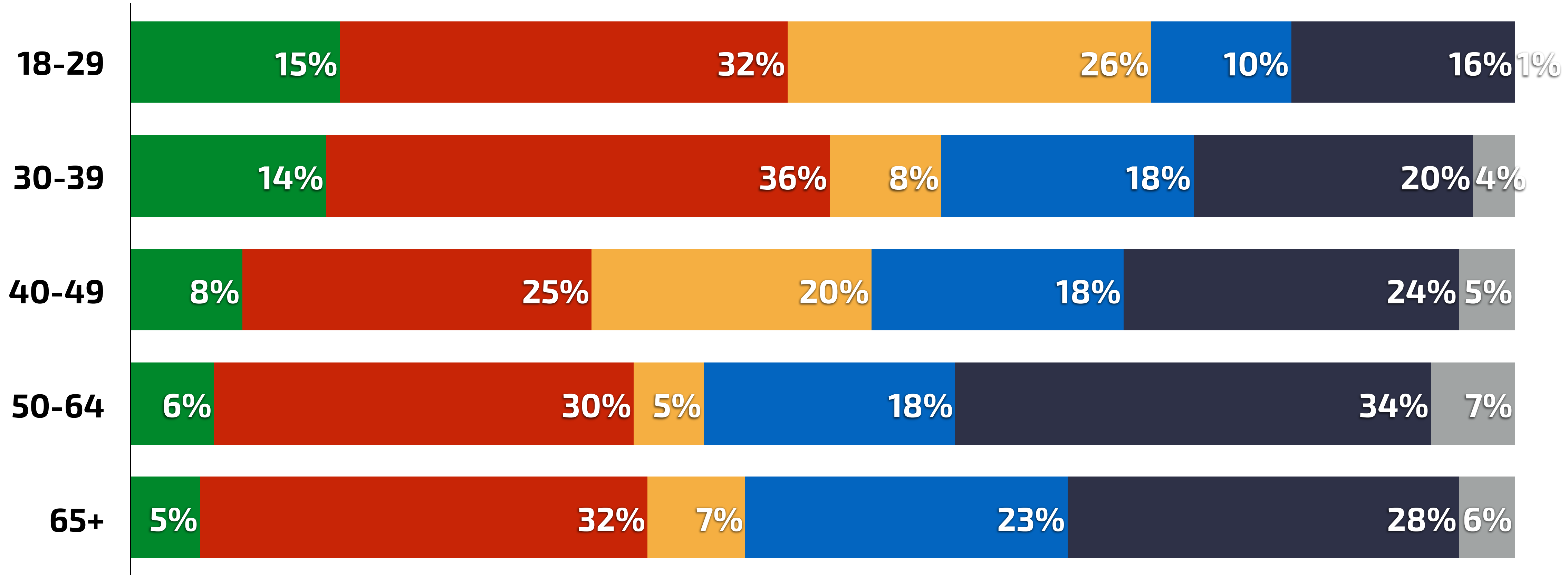
Labor Party Receives A Plurality With All Groups But Non-College Educated White Voters



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

N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023

Acela And Green Party Options Are Most Popular With Younger Voters, Nationalists Strongest With Older Voters



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

N = 1,020 Voters in the 2024 Likely Electorate nationwide, fielded June 26-29, 2023



ECHELON
INSIGHTS

