



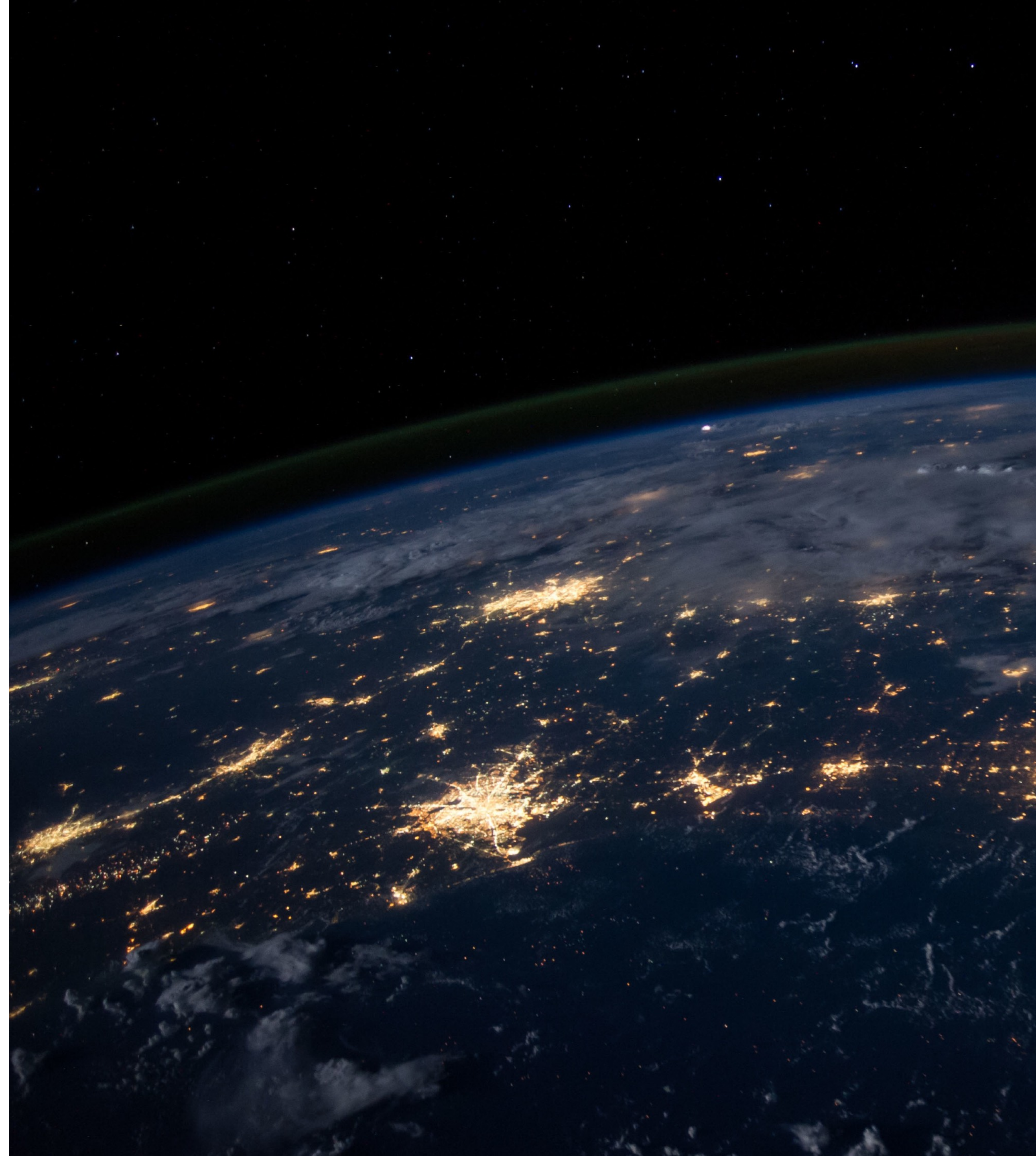
2025 Political Tribes Briefing

Verified Voter Omnibus Survey

N=982 Voters in the Likely Electorate (LE),

Nationwide

Field Dates: June 12-17, 2025



It's easy to think of American voters as hopelessly polarized, with few true Independents or undecided voters.



**But when you look beyond how people vote,
to what they actually believe, the picture is
more complex.**

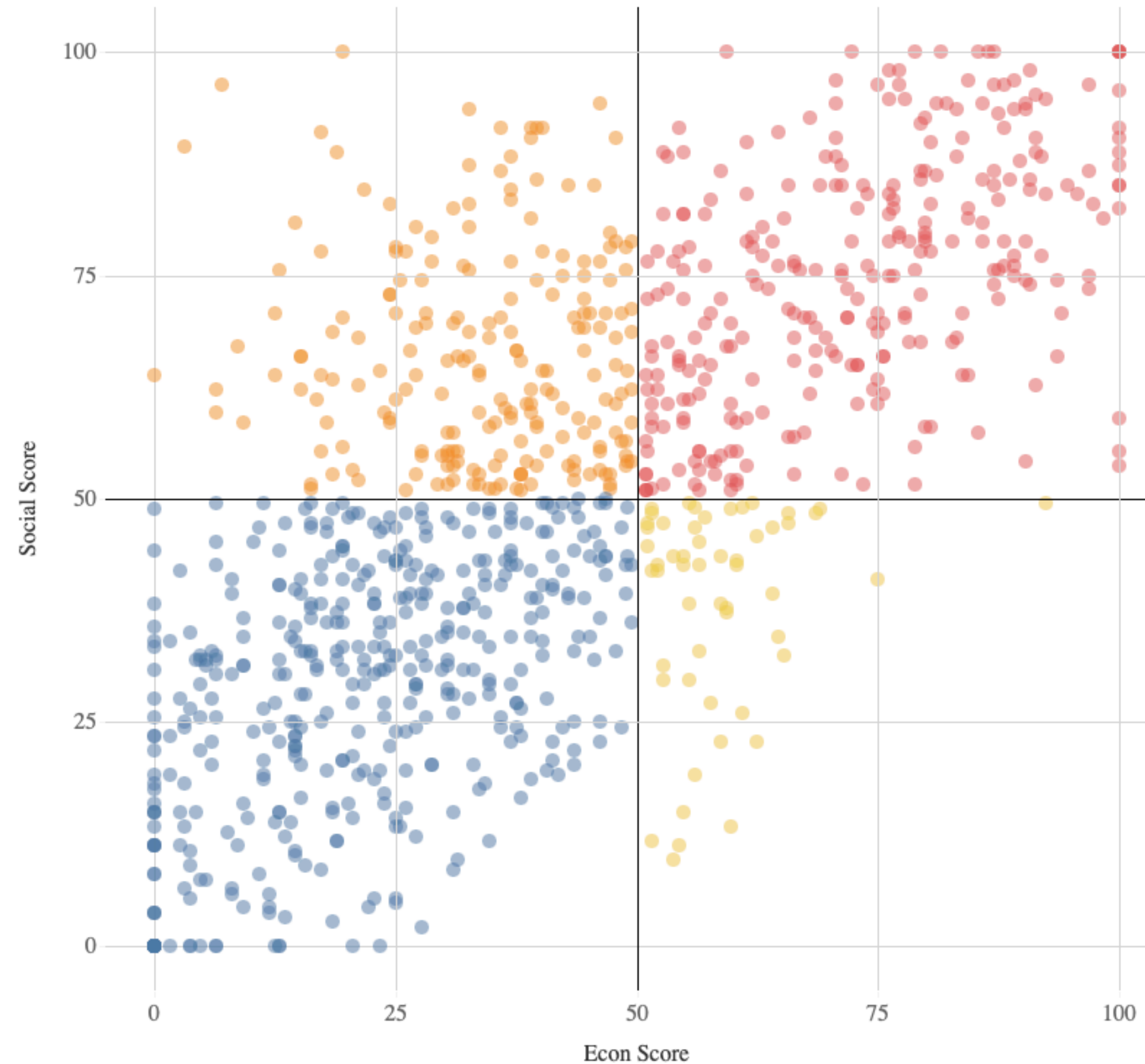


The 2025 Political Quadrants: Mapping ideology in 2 dimensions

- Asking a series of social/cultural questions and economic questions reveals an America that leans right on cultural issues and left on economics.
- Just 5% of Americans are “economically conservative, socially liberal.”



Mapping Registered Voters by Political Ideology



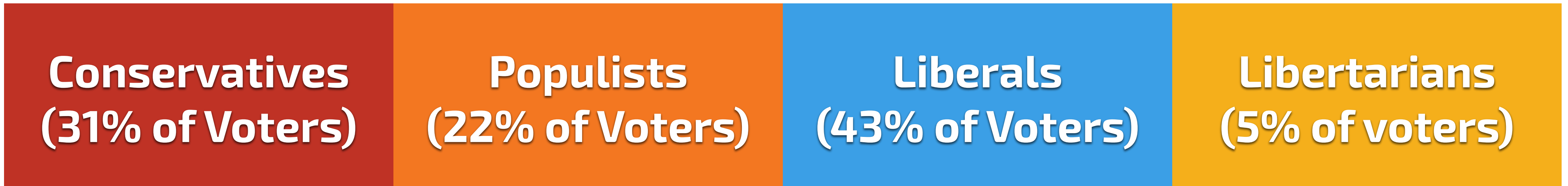
Breakdown by:

- Conservative
- Liberal
- Libertarian
- Populist

	Likely Electorate Share	Mean Social Score	Mean Econ Score
Conservative	31%	74.9%	71.8%
Liberal	43%	29.0%	22.4%
Libertarian	5%	37.9%	58.0%
Populist	22%	65.8%	34.2%

Defining the four quadrants

Voters were grouped into four quadrants based on how they answered the 9 cultural and 9 economic questions in the June 2025 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)

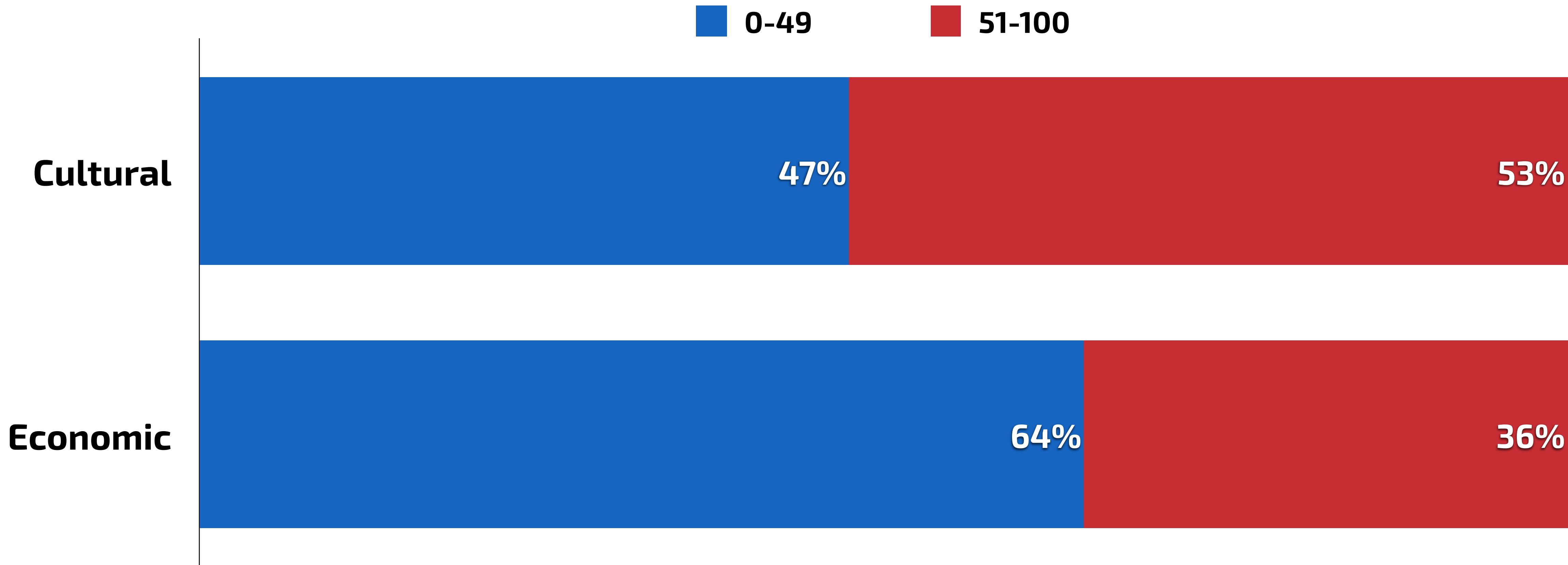
Economically Liberal
(Economic Score 0-49)

Economically Conservative
(Economic Score 51-100)



Note: Numbers may not add up to 100 due to rounding
N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8%

Cultural conservatives outnumber cultural liberals 53-47, economic liberals outnumber economic conservatives 64-36



Note: Scores under 50 are liberal, scores over 50 are conservative; 50s are divided evenly between liberal and conservative groupings.
N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8%

Cultural issues: The right wins 5 of 9 debates

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	59%	↔	39%	Abortion should be illegal in all or most circumstances
It is more important to control gun ownership	48%	↔	48%	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	40%	↔	55%	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	27%	↔	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	43%	↔	51%	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	38%	↔	58%	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%	↔	62%	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	57%	↔	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	64%	↔	31%	Gay and lesbian couples should not be allowed to marry legally



Note: Unsure not included
 N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8%

Economic issues: The left wins 8 of 9 debates

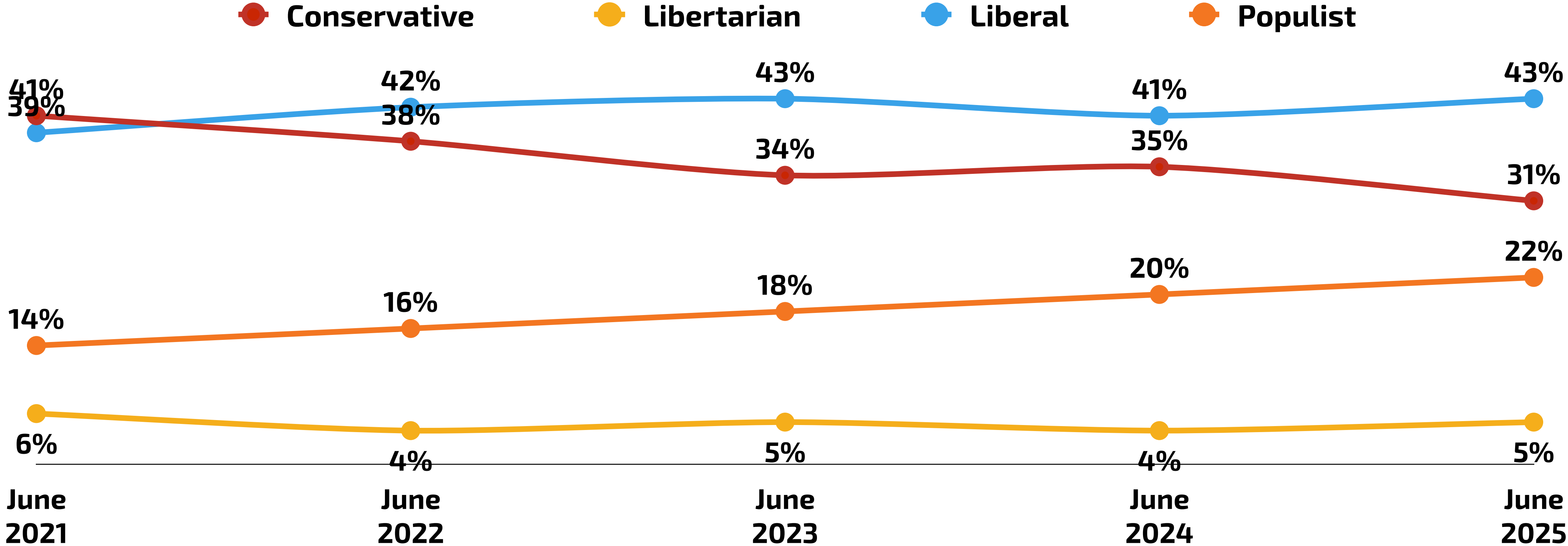
Voters were asked if they agreed more with the more liberal or more conservative stance on a variety of economic issues.

Liberal			Conservative	
Hard work and determination are no guarantee of success for most people	46%	↔	52%	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	52%	↔	38%	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	52%	↔	39%	Government regulation of business usually does more harm than good
The federal minimum wage must be increased to \$20.00 an hour	58%	↔	37%	The federal minimum wage should not be increased to \$20.00 an hour
We should raise taxes in order to ensure Social Security and Medicare's long-term future	56%	↔	34%	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 ensure everyone has health care coverage	62%	↔	34%	It is not the responsibility of the federal government to ensure everyone has health care coverage
Stricter environmental laws and regulations are worth the cost	53%	↔	41%	Stricter environmental laws and regulations cost too many jobs and hurt the economy
We should raise taxes on people making more than \$250,000 a year	68%	↔	27%	We should not raise taxes on people making more than \$250,000 a year



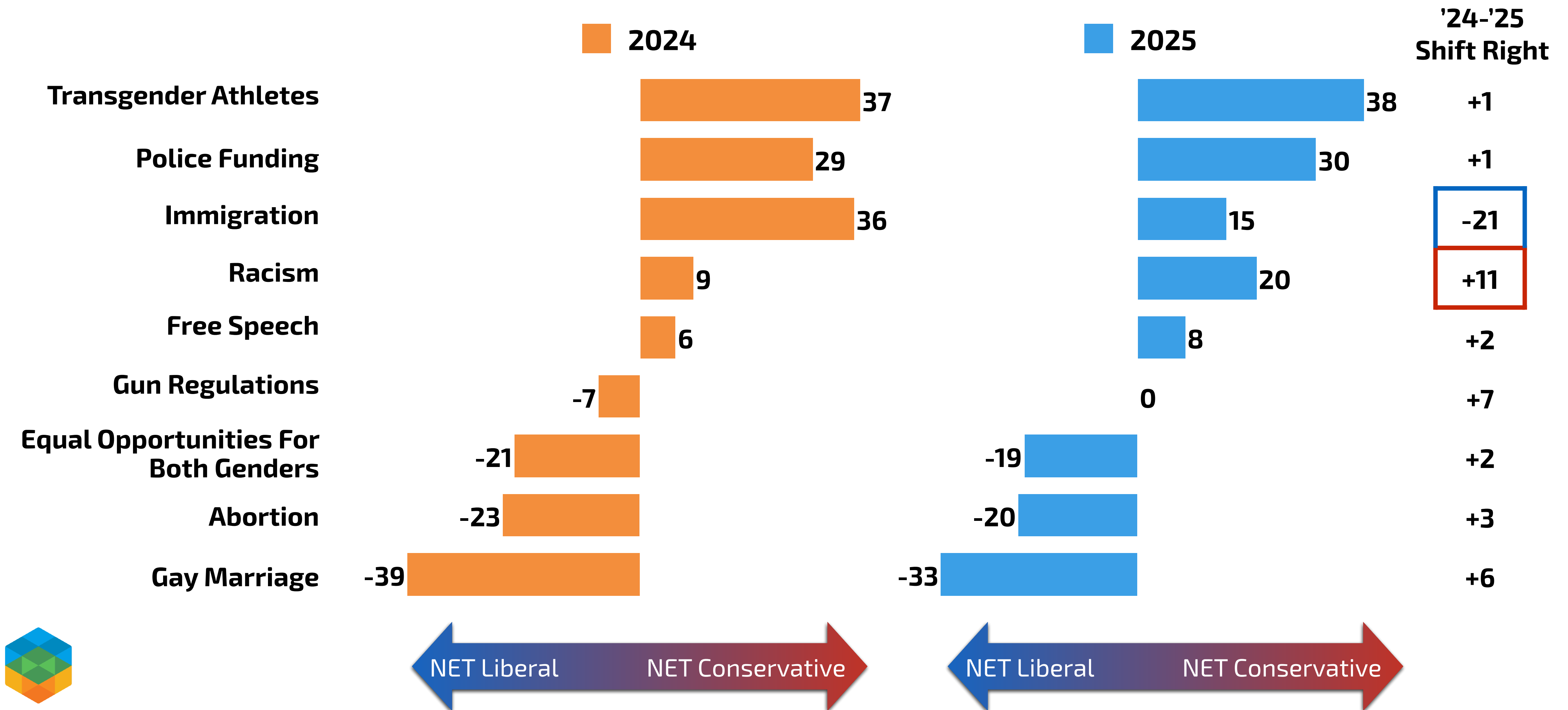
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The Populist share of the electorate has grown since 2021, while the Conservative bloc has declined



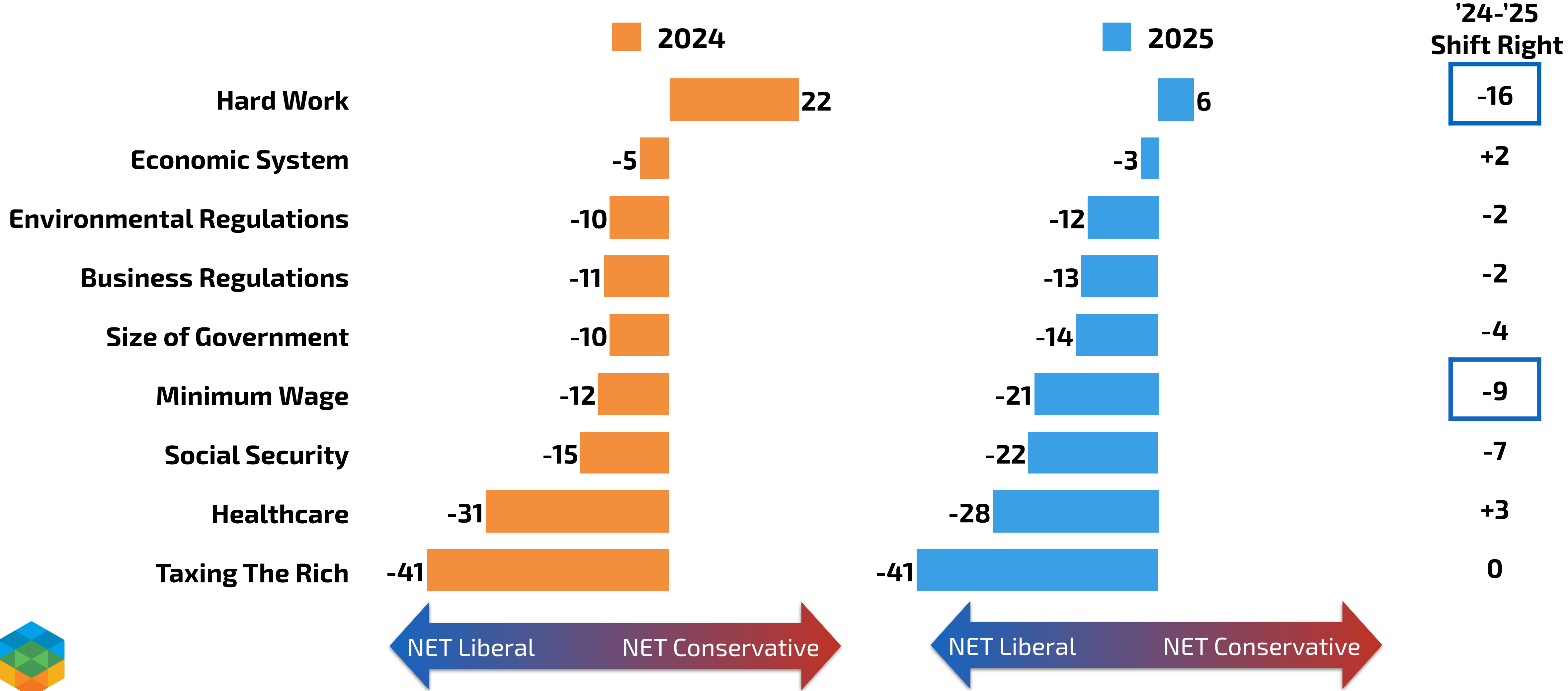
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Voters move left on immigration, right on racism



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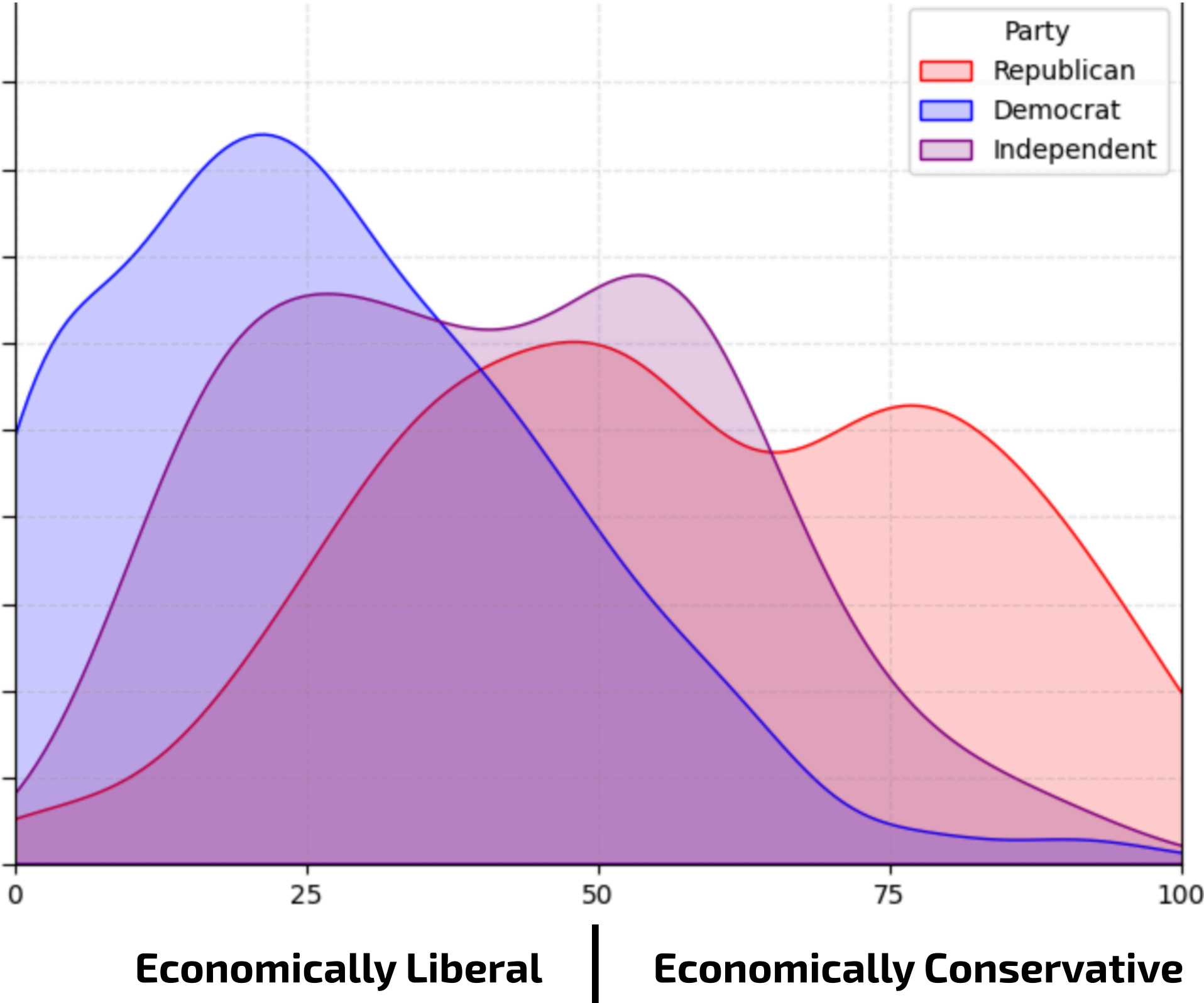
Voters shift 16 points to the left on whether hard work will cause success and even further left on most economic issues



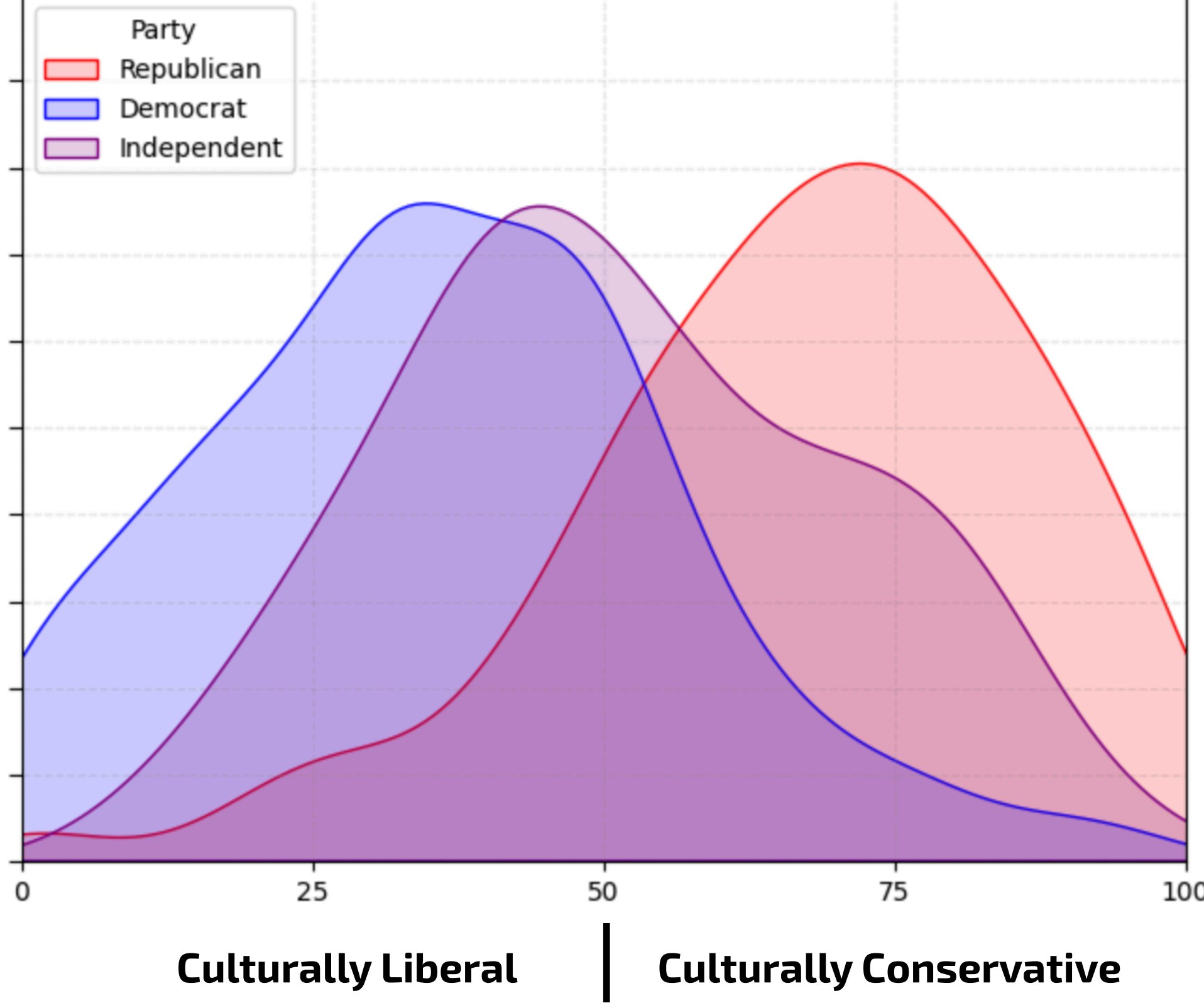
N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8%

Republicans are economically moderate; social views are divided along party lines

Economic Index by Party



Social Index by Party

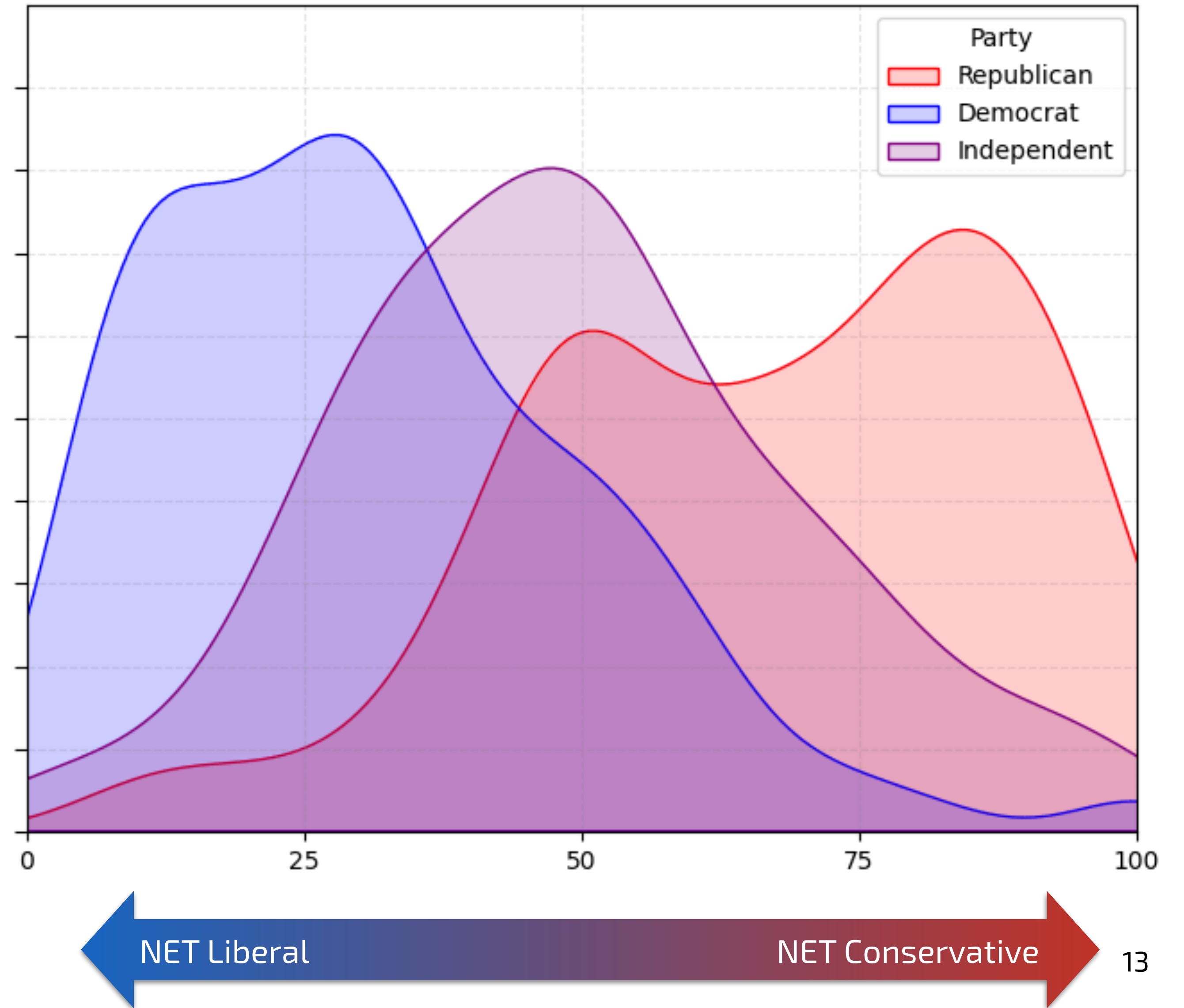


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Republican voters have become economic populists under Trump



Economic Scores Density by Party - 2021



Populists, who voted for Trump 67-32, approve of his job performance by 17 points

Q. Do you approve or disapprove of the way Donald Trump is handling his job as President?

Strongly/Somewhat approve Unsure Strongly/Somewhat disapprove

NET
(Approve-Disapprove)

Conservative



+70

Populist



+17

Liberal



-74

Libertarian



-35



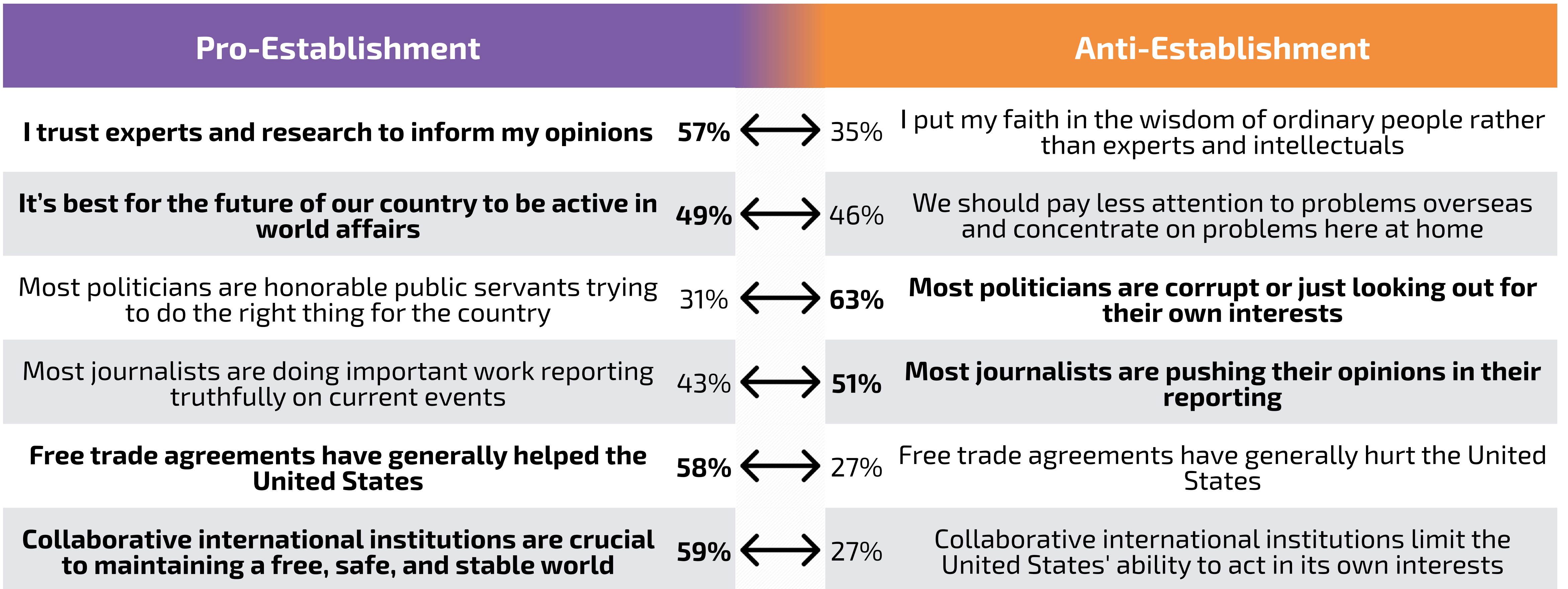
N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8%

Adding a third dimension: Trust in institutions



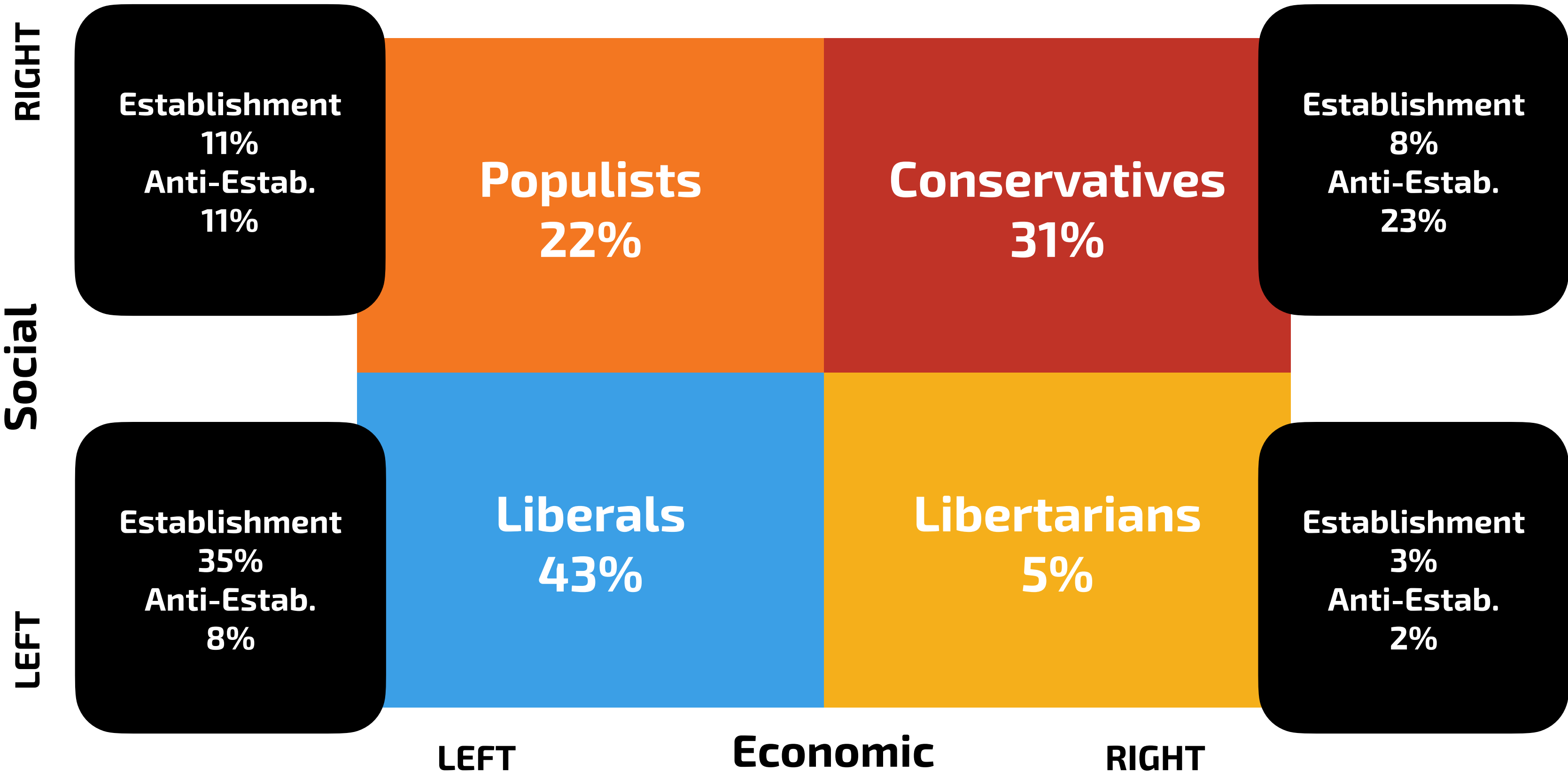
Establishment index: Voters lean trustful on 4 of 6 issues

Voters were asked if they agreed more with the more pro- or anti-establishment stances on a variety of issues.



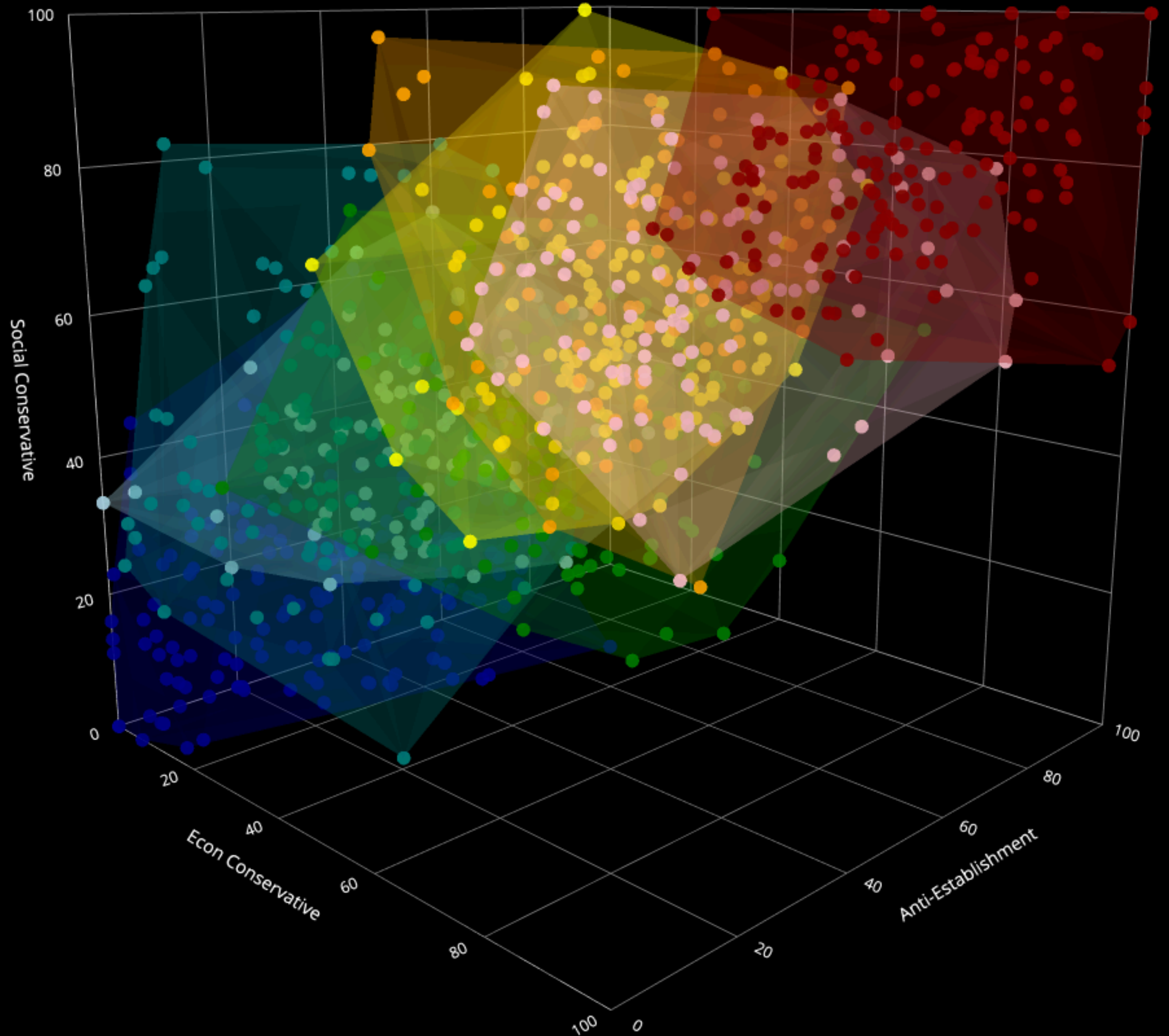
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Institutional trust correlates with ideology: Conservatives are largely distrustful and liberals trustful



This third dimension lets us create a 3D map of the American electorate

- ***Visit EchelonInsights.com/Tribes to view the interactive 3D visualization***



Going beyond static 2-way partisanship, we used our social, economic, and establishment questions to cluster voters into 8 political tribes – each representing a distinct belief system.



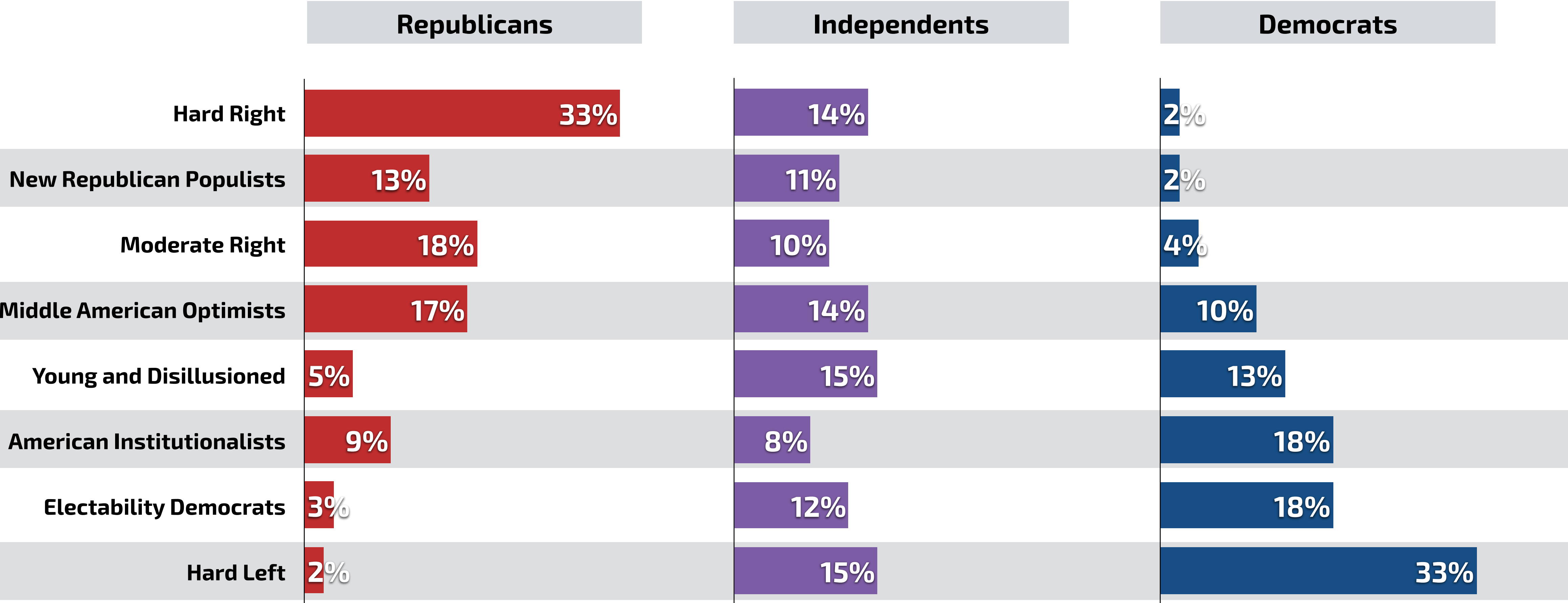
America's 8 Political Tribes

			2024 Margin
17%	Hard Right	Staunch conservatives across the social and economic spectrum who also take consistently anti-establishment positions. Skews older and male.	Trump +94
11%	Moderate Right	Take right-leaning positions on most issues but trust experts, support free trade, are pro-gay marriage and believe there are obstacles for women.	Trump +55
8%	New Republican Populists	Socially to the right and economically to the left: "Medicare for all, abortions for none." Rural-heavy, very anti-establishment, and pessimistic.	Trump +72
14%	Middle American Optimists	Middle of the road on most issues, pro-choice, and optimistic about the ability to get ahead through hard work.	Trump +28
10%	Young and Disillusioned	Young, female, and racially diverse. Skeptical of regulation but for a robust welfare state. The most anti-establishment of the Harris-voting clusters.	Harris +27
12%	American Institutionalists	Firmly pro-establishment, this cluster is unified by a belief that the system basically works, from faith in hard work, police, and the U.S. economic model.	Harris +43
11%	Electability Democrats	Left-leaning on most issues but diverges from unpopular left-wing positions like defunding the police and trans athletes in sports.	Harris +68
16%	Hard Left	The name says it all. Socially and economically liberal, largely pro-establishment.	Harris +86



Note: Percents reflect the portion of the overall electorate.
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The Hard Right and Hard Left are only one third of their respective parties

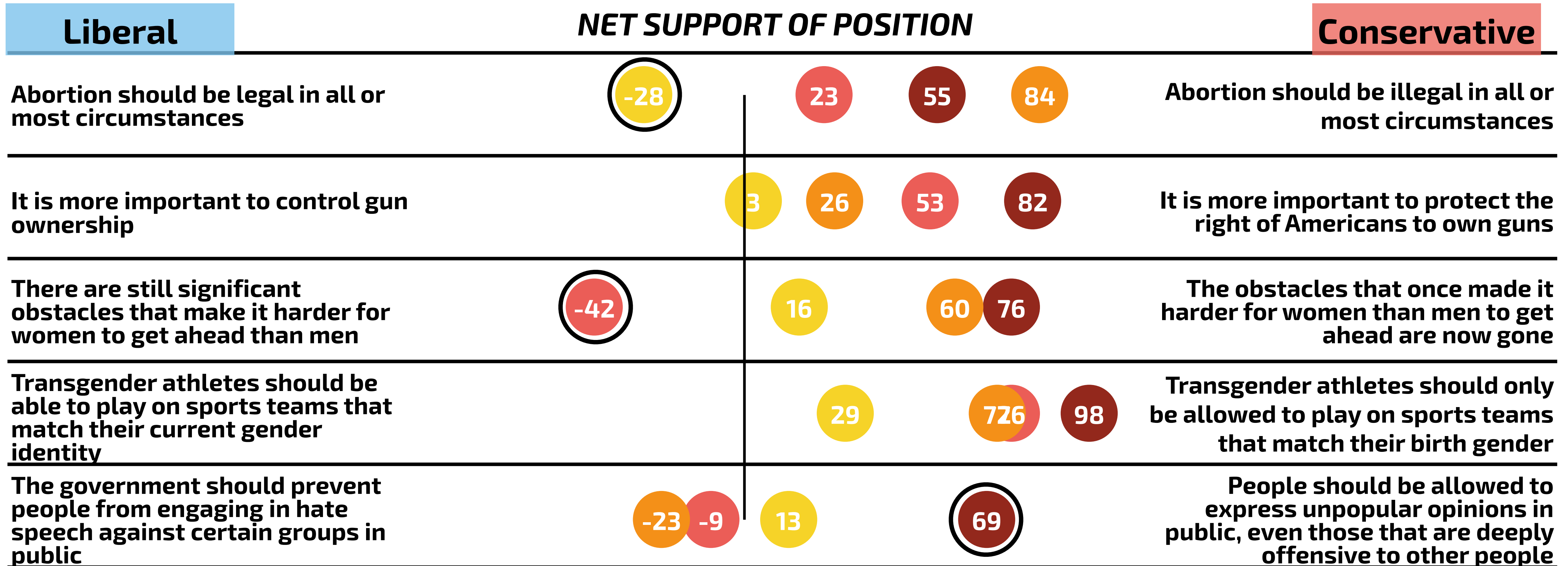


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What Divides the Right



Abortion, obstacles for women, and free speech are points of division for the Right



● Middle American Optimists
 ● New Republican Populists
 ● Moderate Right
 ● Hard Right



Q. For each of the following please indicate whether you agree more with Option 1 or Option 2.
 N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8%

A growing divide is opening on economic issues

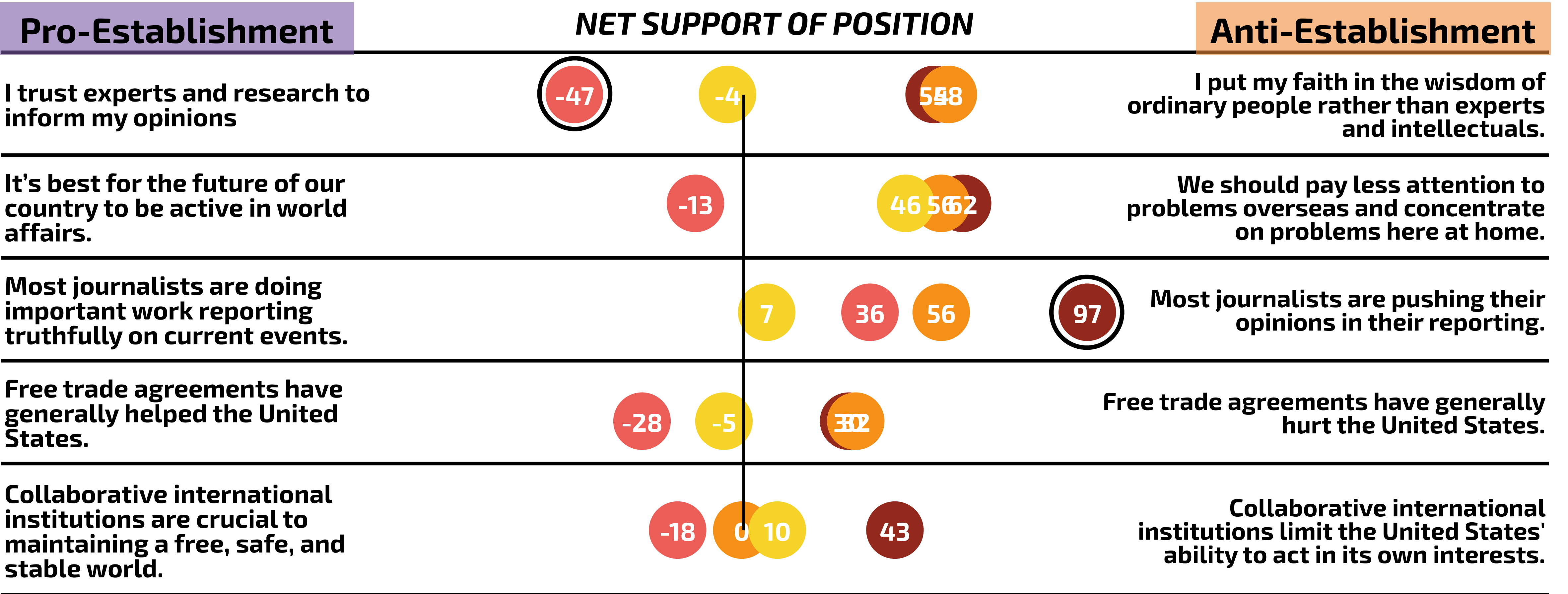
Liberal	NET SUPPORT OF POSITION				Conservative
Hard work and determination are no guarantee of success for most people	-66		72		Most people who want to get ahead can make it if they're willing to work hard
I would rather have a bigger government providing more services	-31	-12	42	90	I would rather have 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	-24/17		71	98	The fact that some people in the U.S. are rich and others are poor is an acceptable part of our economic system
It is the responsibility of the federal government to see to it that everyone has health care coverage	-31	-15	12	82	It is not the responsibility of the federal government to see to it that everyone has health care coverage
The federal minimum wage must be increased to \$20 an hour	-70		-36	75/86	The federal minimum wage should not be increased to \$20 an hour

● Middle American Optimists
 ● New Republican Populists
 ● Moderate Right
 ● Hard Right



Q. For each of the following please indicate whether you agree more with Option 1 or Option 2.
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Trust of experts and opinions of journalists are points on which the Right differs



● Middle American Optimists
 ● New Republican Populists
 ● Moderate Right
 ● Hard Right

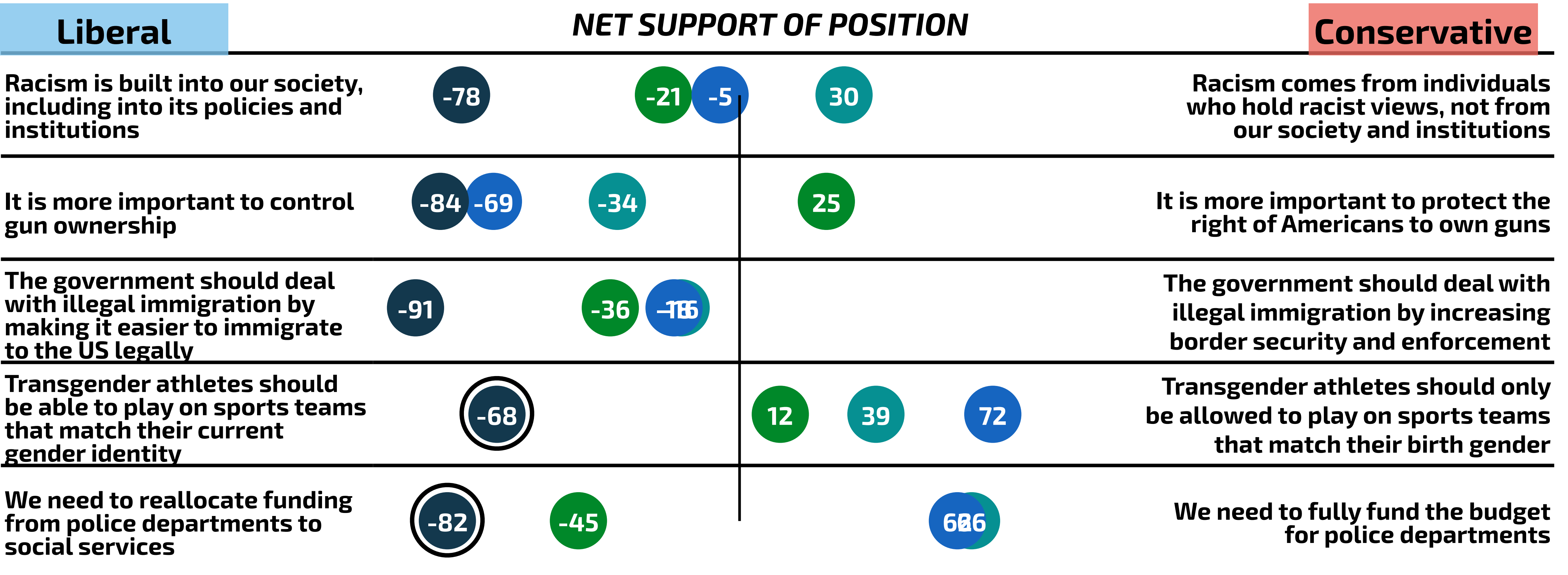


Q. For each of the following please indicate whether you agree more with Option 1 or Option 2.
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What Divides the Left



Transgender athletes and police funding are the biggest areas of disagreement on the Left

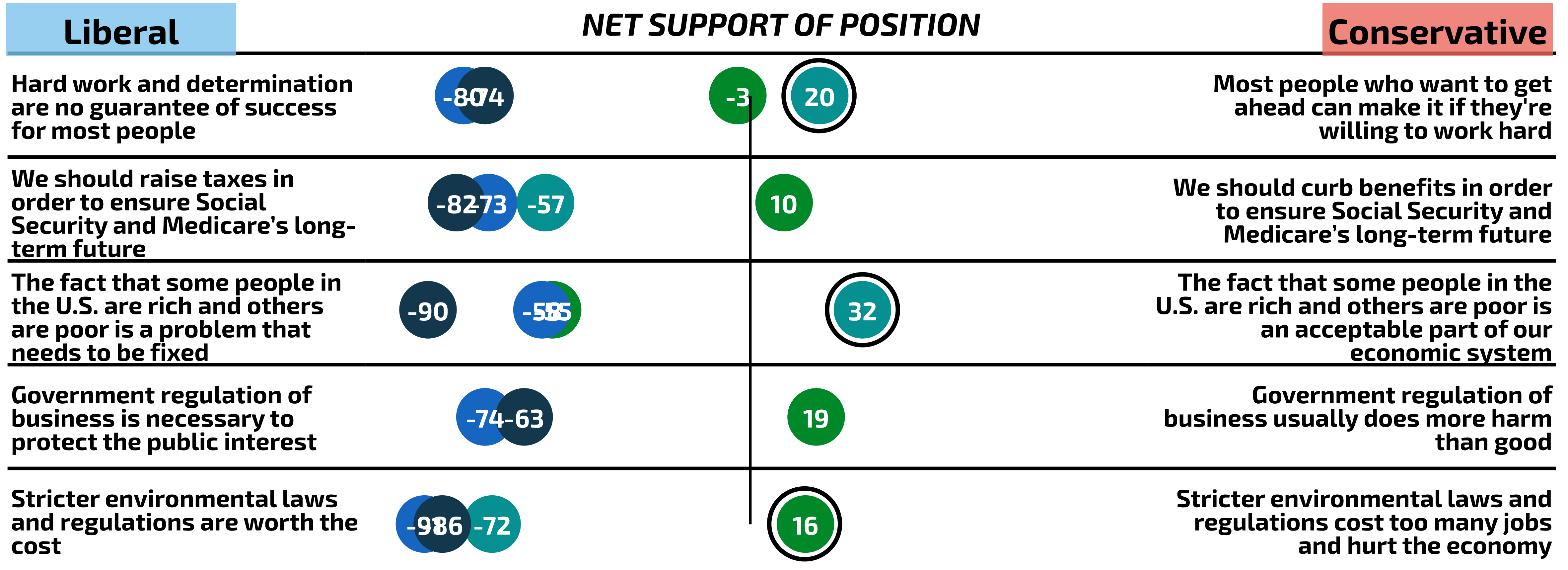


● Hard Left ● Electability Democrats ● American Institutionalists ● Young and Disillusioned



Q. For each of the following please indicate whether you agree more with Option 1 or Option 2.
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The Left disagrees on core principles about hard work and the fairness of the economic system

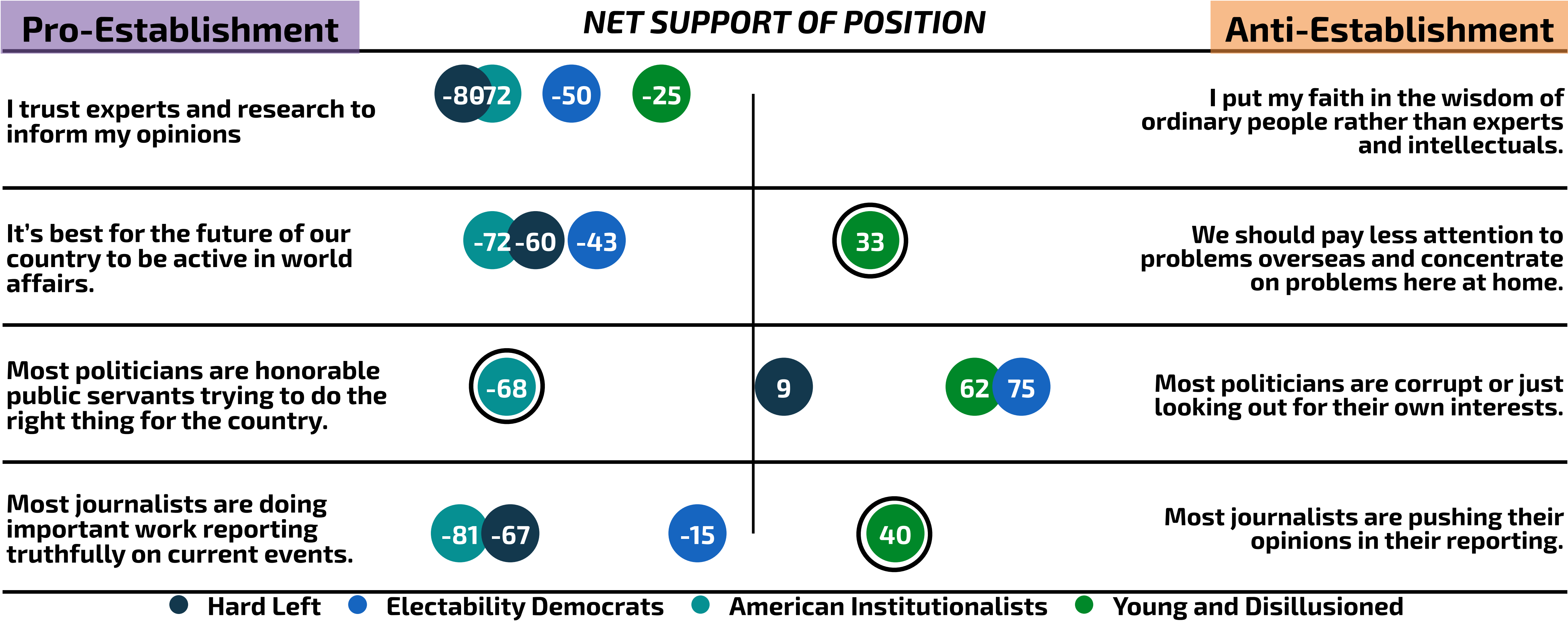


● Hard Left ● Electability Democrats ● American Institutionalists ● Young and Disillusioned



Q. For each of the following please indicate whether you agree more with Option 1 or Option 2.
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The Left leans pro-establishment, aside from views of politicians



Note: "Unsure" not shown
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The Participation Gap:

How hardcore ideologues dominate the parties & how voters with mixed views opt out



High-propensity Trump voters are more likely to be Hard Right

- Hard Left
- Middle American Optimists
- Electability Democrats
- New Republican Populists
- American Institutionalists
- Moderate Right
- Young and Disillusioned
- Hard Right

Trump Voters



Harris Voters



0-69.9 70-89.9 90-94.9 95-97.4 97.5-100 0-69.9 70-89.9 90-94.9 95-97.4 97.5-100

Low Turnout

2024 Turnout Score

High Turnout

Low Turnout

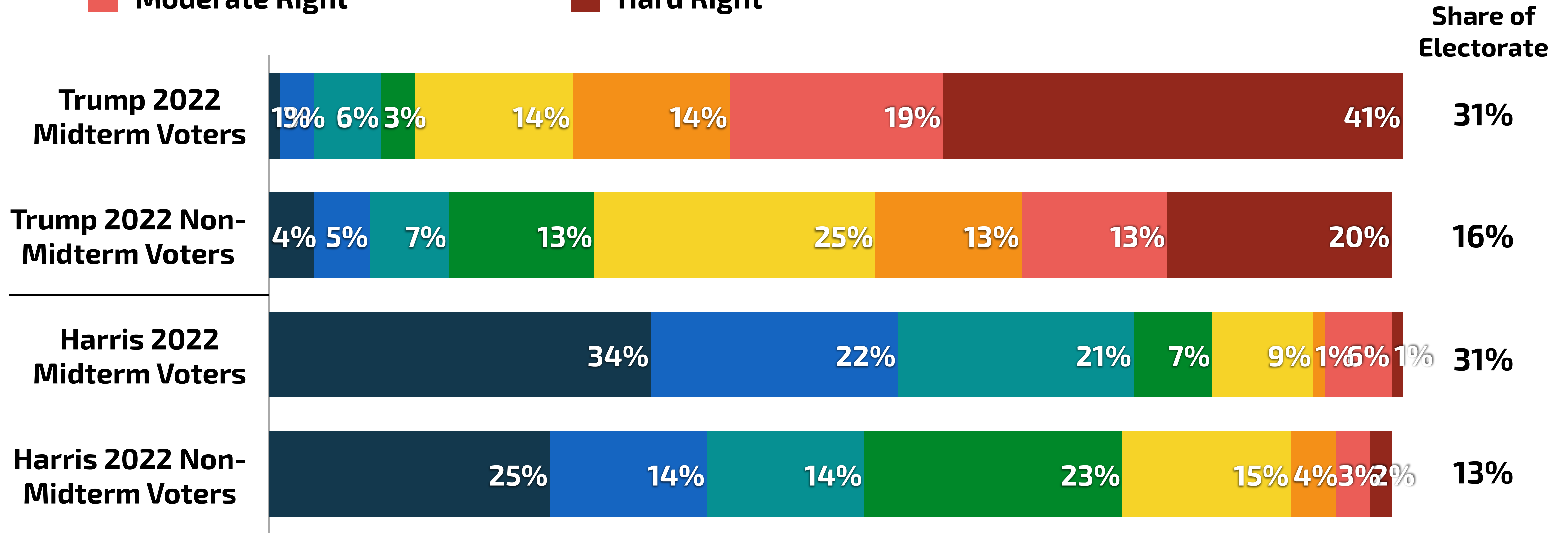
2024 Turnout Score

High Turnout



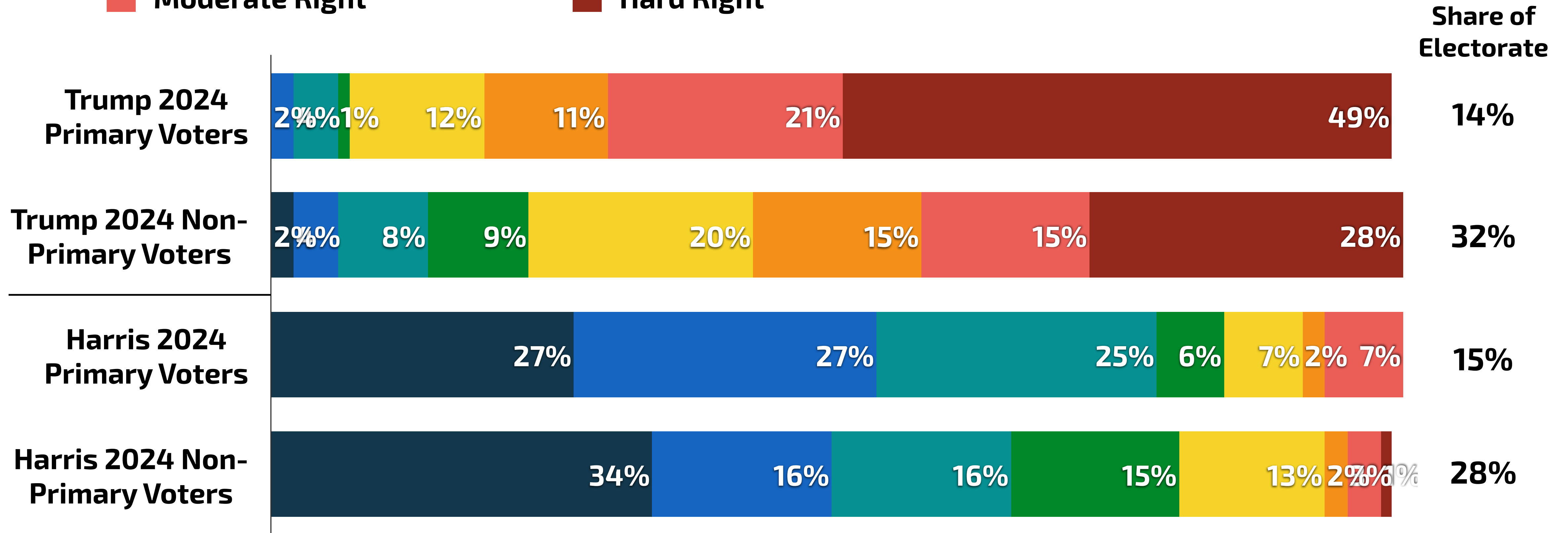
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Midterm voters differ widely from non-midterm voters



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Trump primary voters differ from Trump non-primary voters



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What would multi-party democracy look like in the United States?



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.

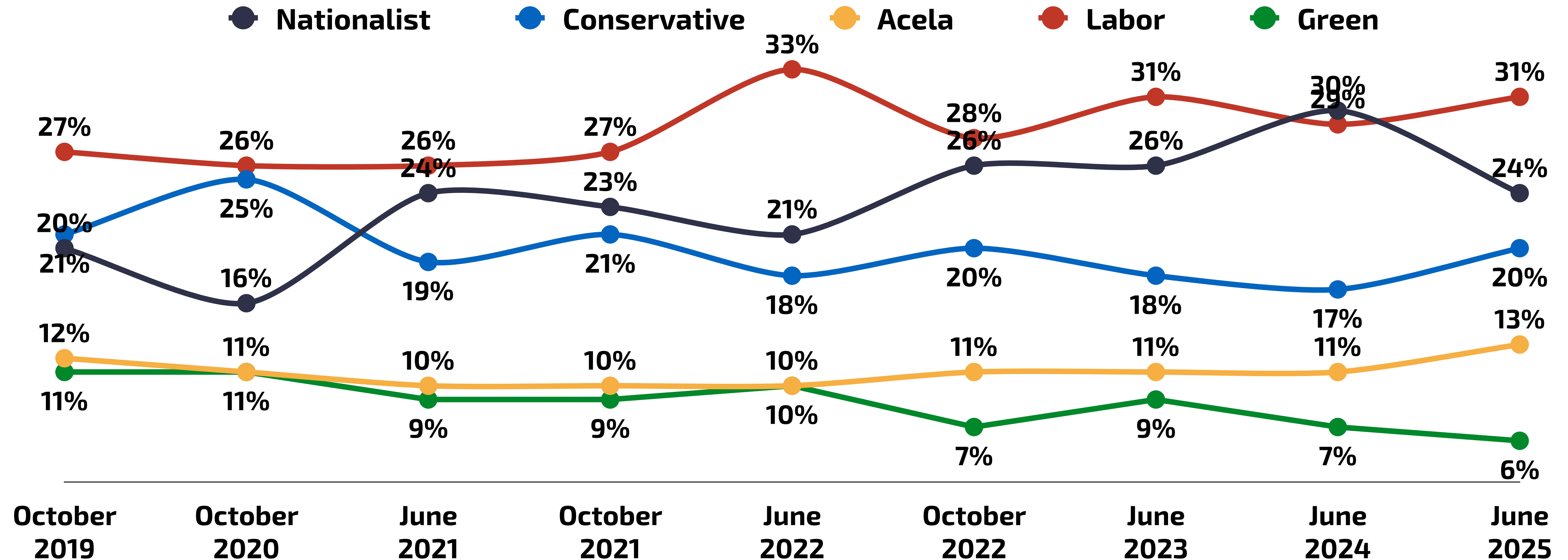
PARTY	LEADER	SUPPORT	DESCRIPTION
NATIONALIST		24%	Stop illegal immigration, put America First, stand up to political correctness, and end unfair trade deals
CONSERVATIVE		20%	Defend the American system of free enterprise, promote traditional family values, and ensure a strong military
ACELA		13%	Advance 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		6%	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: Unsure not included
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Labor Party retakes lead from Nationalist Party

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



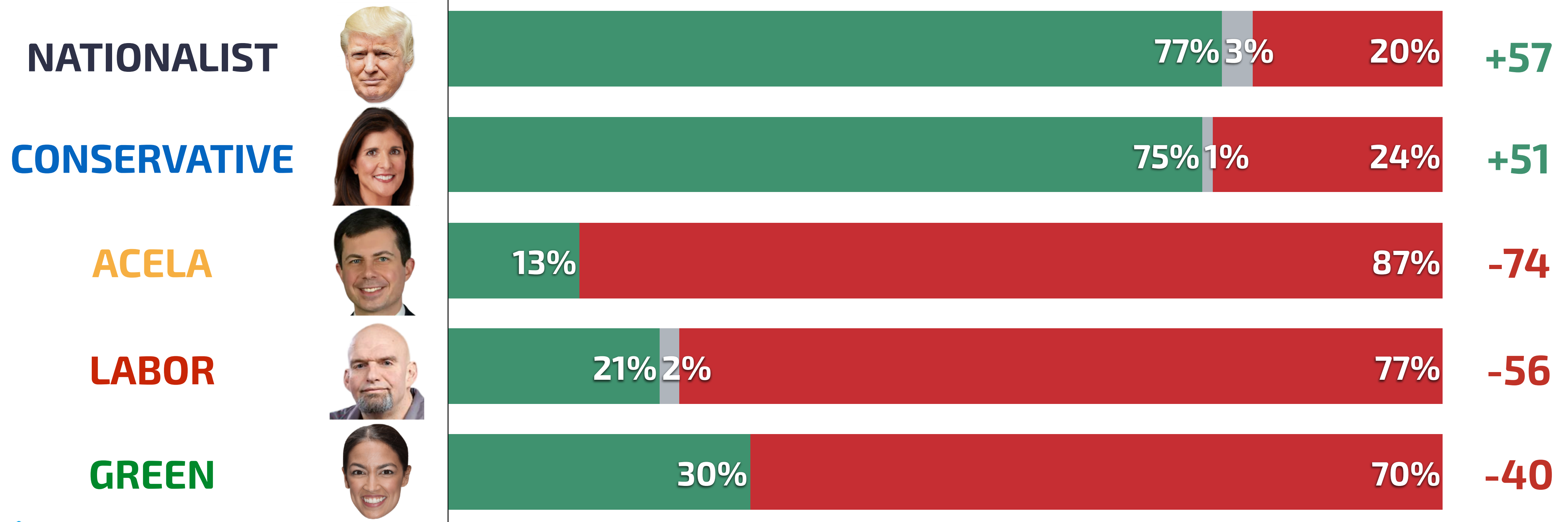
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 N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8%

Nationalists and Conservatives overwhelmingly approve of Donald Trump; Acela, Labor, and Green Party voters disapprove

Q. Do you approve or disapprove of the way Donald Trump is handling his job as President?

■ Strongly/Somewhat approve
 ■ Unsure
 ■ Strongly/Somewhat disapprove

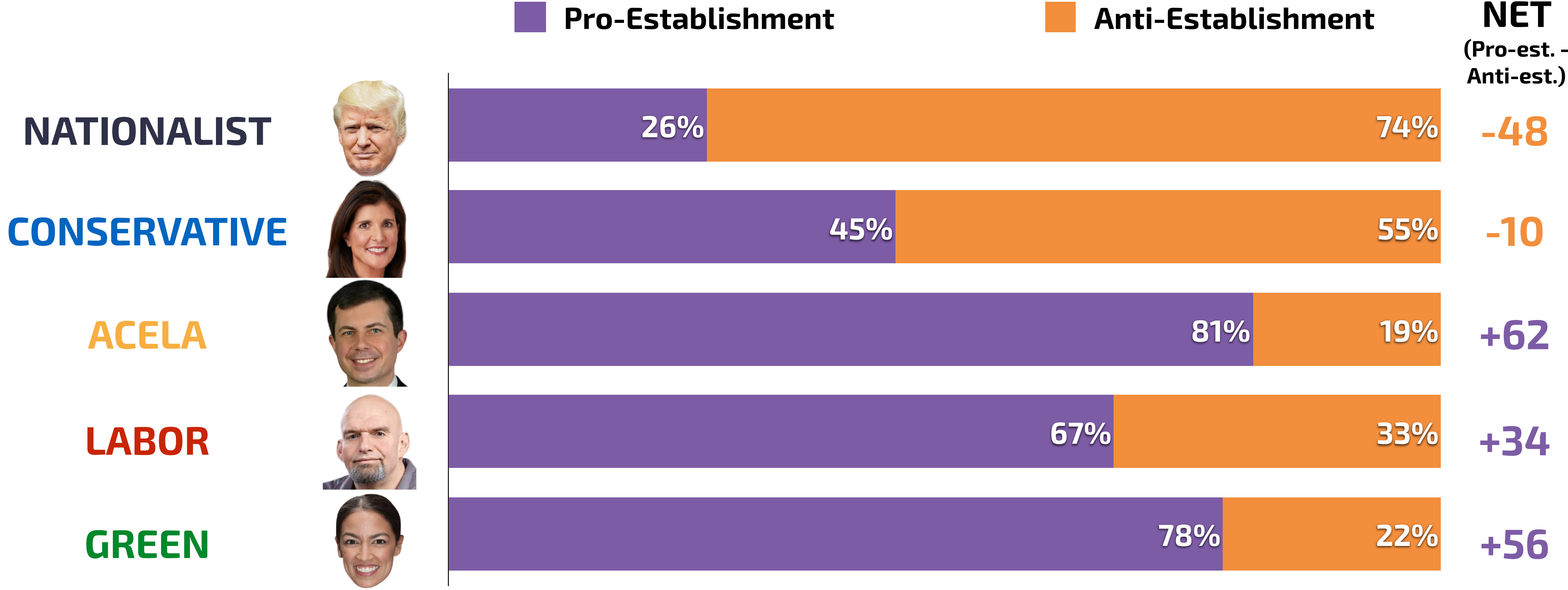
NET
(Approve-Disapprove)



N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8%



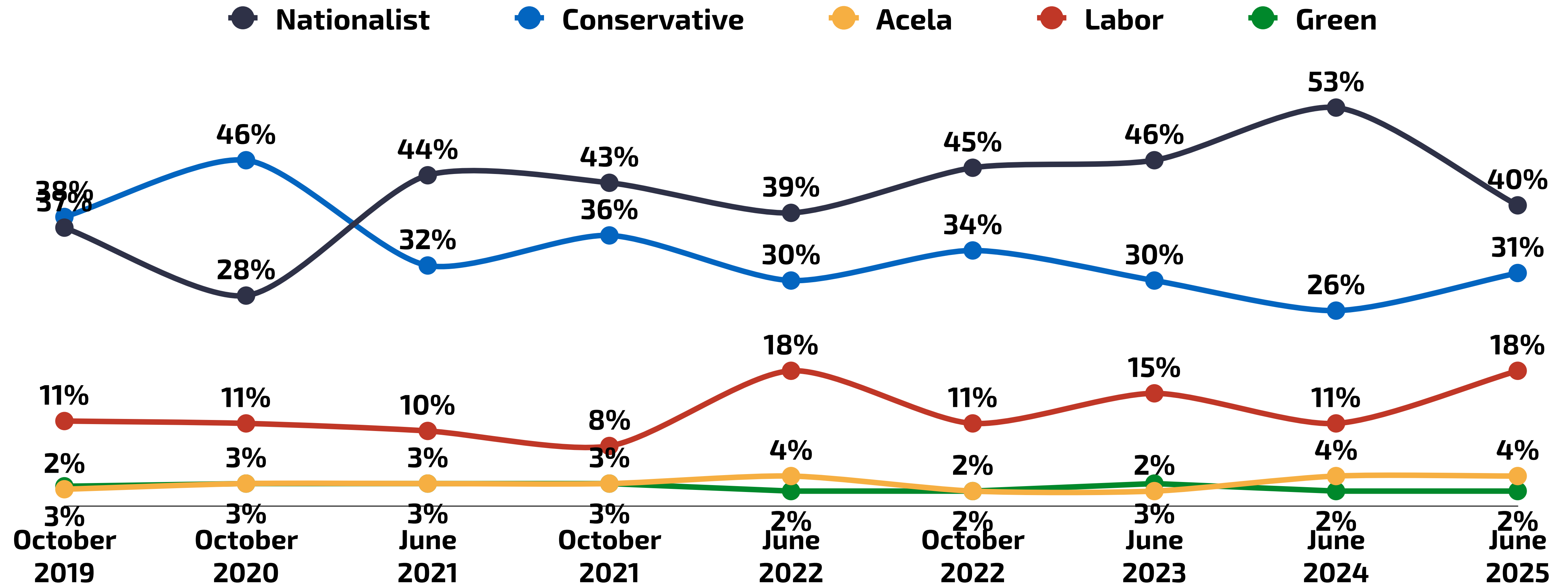
The Nationalist Party is heavily anti-establishment



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Nationalist support among GOP dips from record high

Among GOP + Lean Voters



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 N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17, 2025 Verified Voter Omnibus, Margin of Error= +/- 3.8% [% AMONG GOP+LEAN VOTERS]



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