



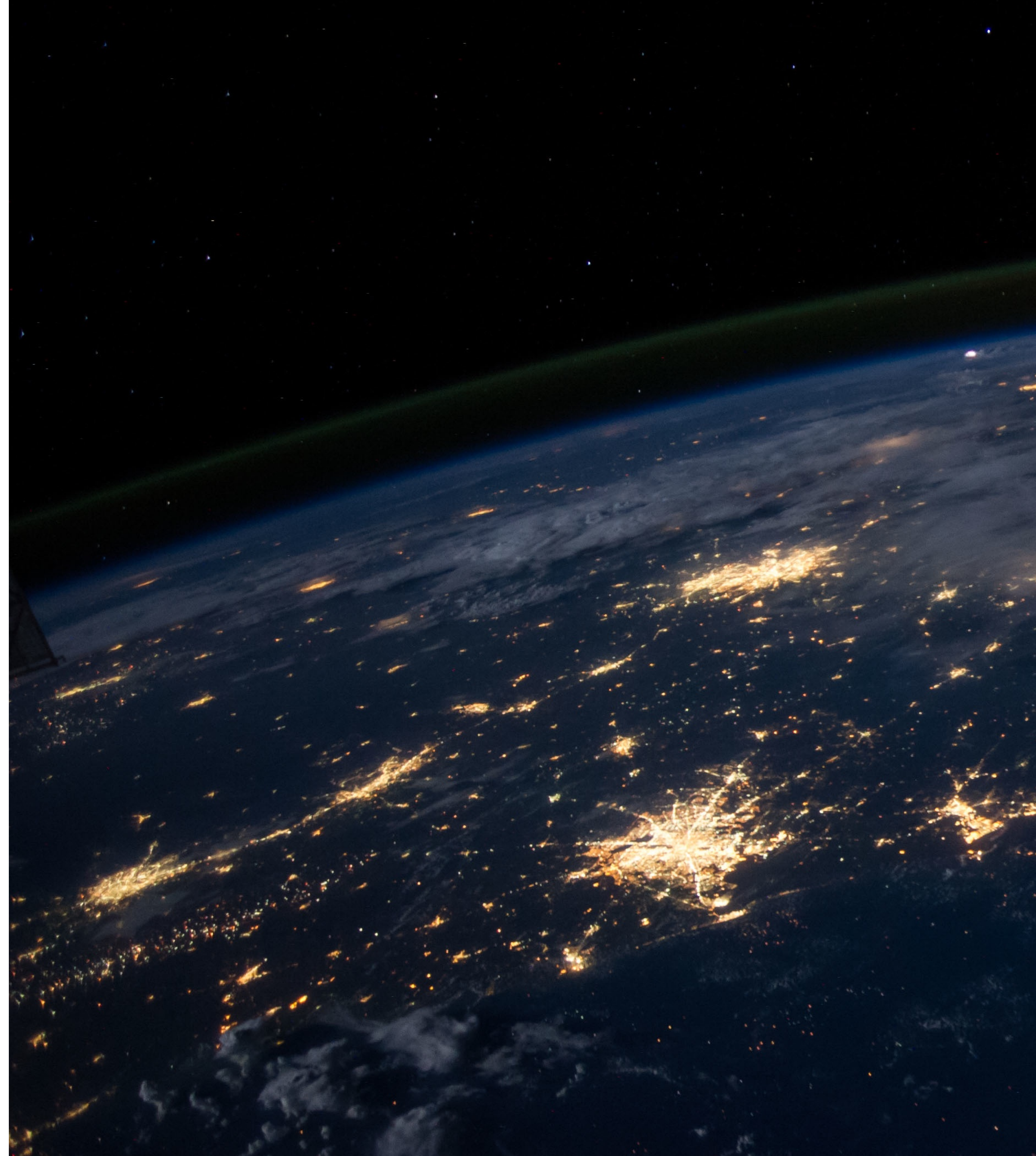
Quadrants 2025

Verified Voter Omnibus Survey

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

Nationwide

Field Dates: June 12-17, 2025



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	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
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Economic issues

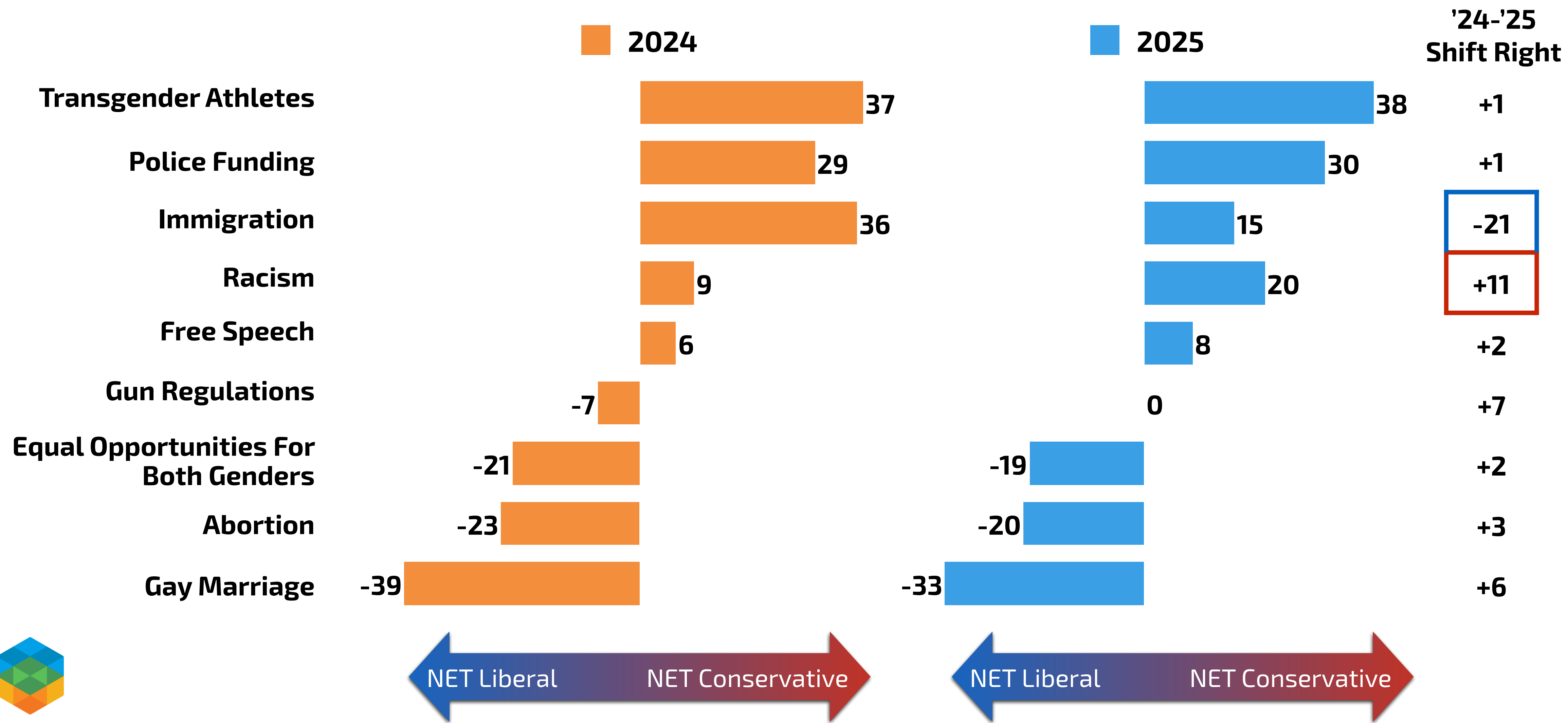
Voters were asked if they agreed more with the more liberal or more conservative stance on a variety of economic issues.

Liberal			Conservative	
Hard work and determination are no guarantee of success for most people	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



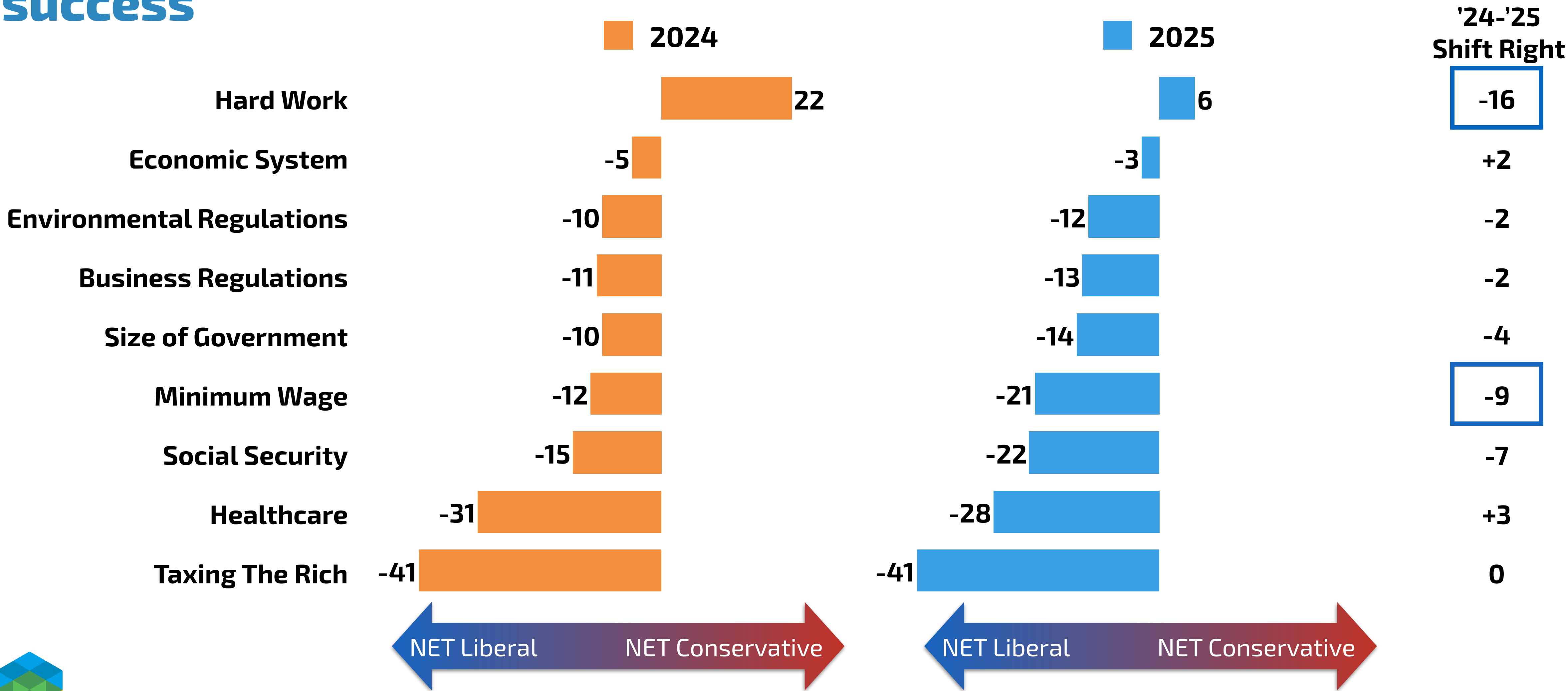
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Voters move left on immigration, right on racism



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Voters shift to the left on whether hard work will cause success



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Defining the four quadrants

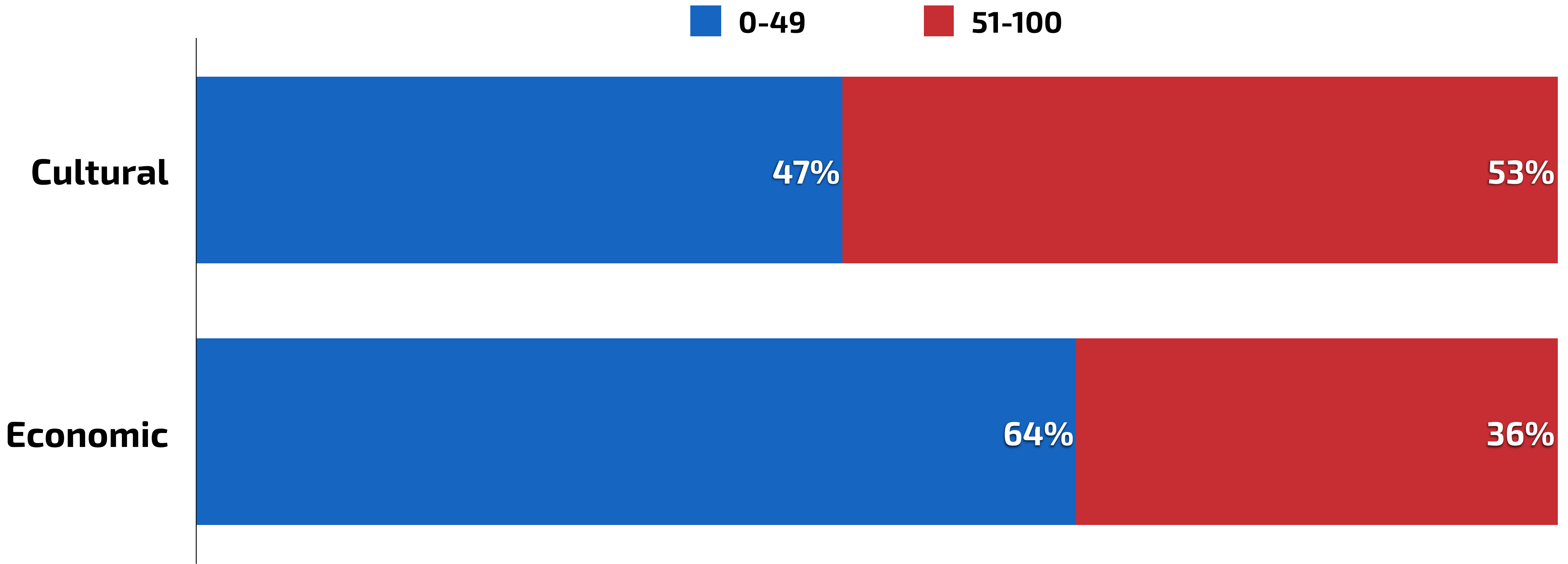
Voters were grouped into four quadrants based on how they answered the 9 cultural and 9 economic questions in the June 2025 Echelon Insights Verified Voter Omnibus.

Conservatives (31% of Voters)	Populists (22% of Voters)	Liberals (43% of Voters)	Libertarians (5% of voters)
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
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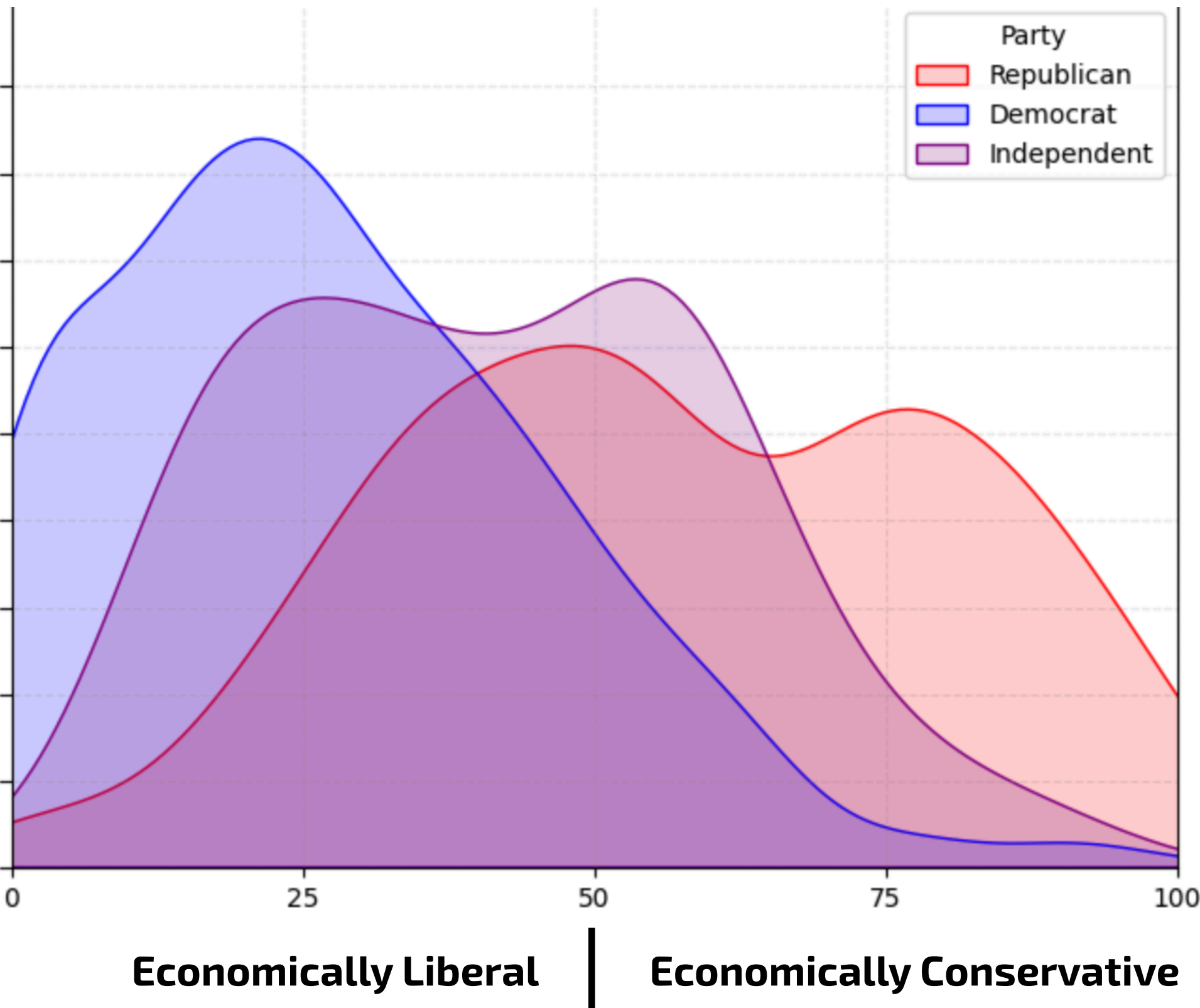
Cultural conservatives outnumber cultural liberals 53-47, economic liberals outnumber economic conservatives 64-36



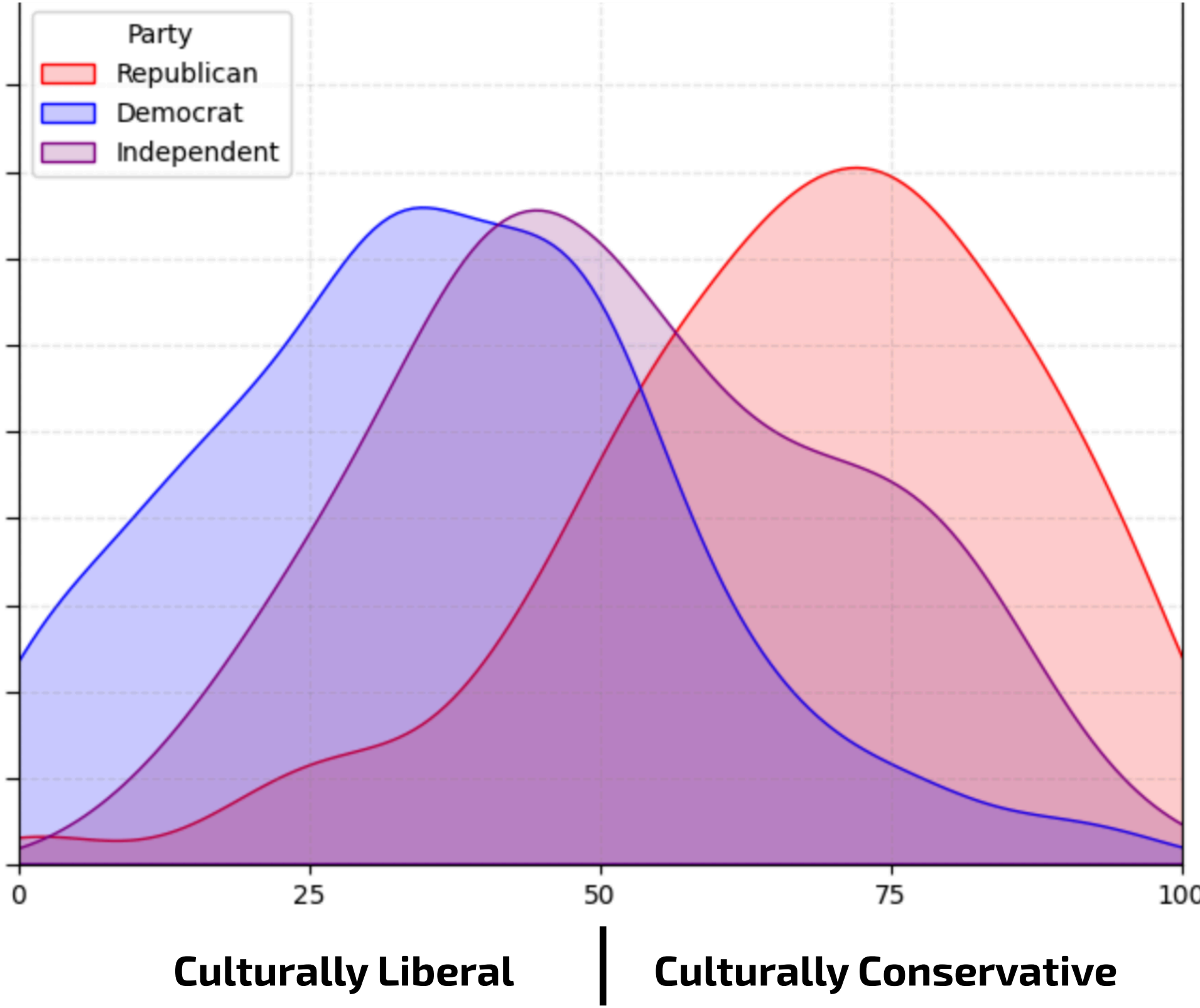
Note: Scores under 50 are liberal, scores over 50 are conservative; 50s are divided evenly between liberal and conservative groupings.
N=982 Registered Voters in the Likely Electorate Nationwide, June 12-17 2025 Verified Voter Omnibus, Margin of Error=±3.8

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

Economic Index by Party

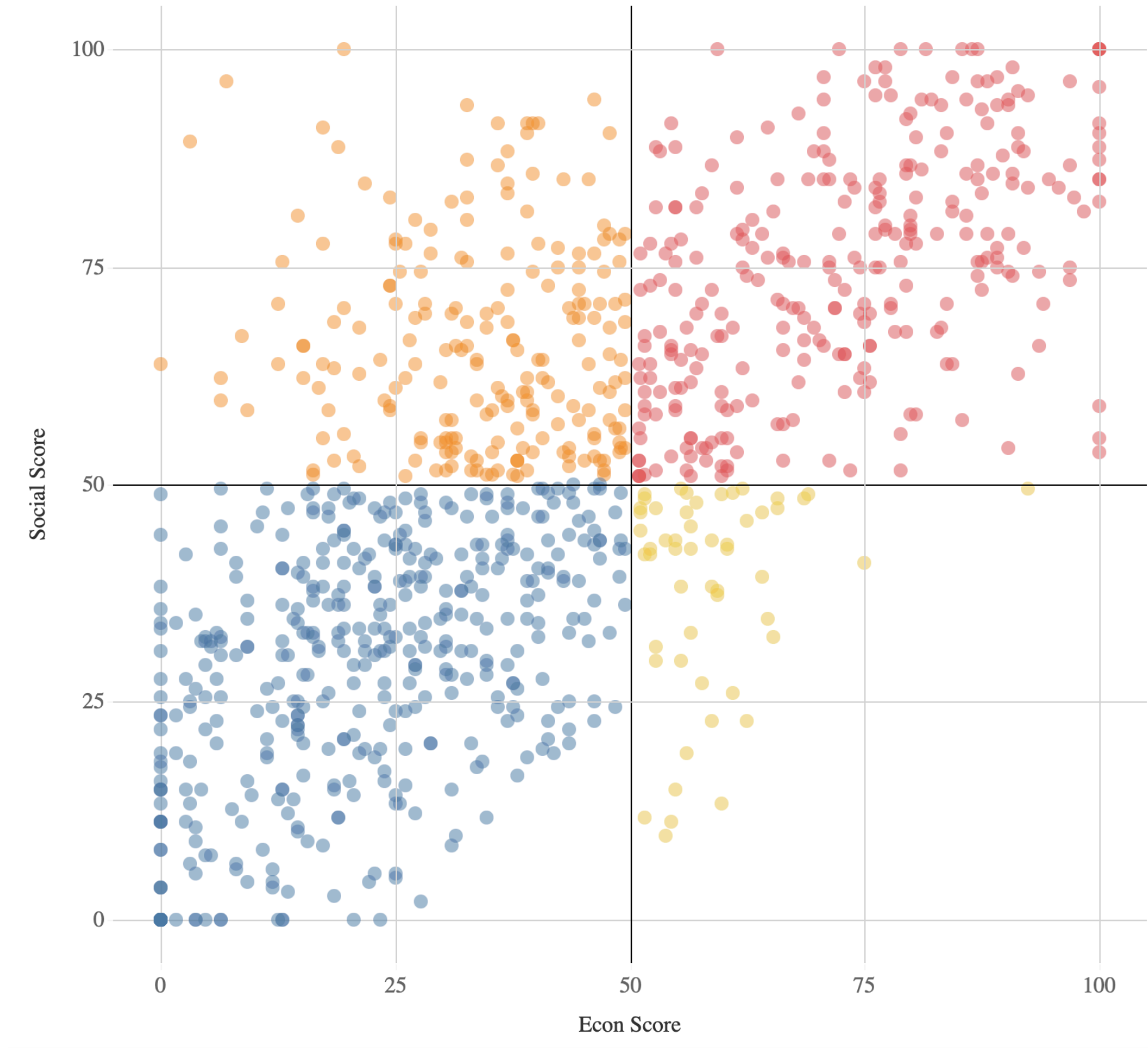
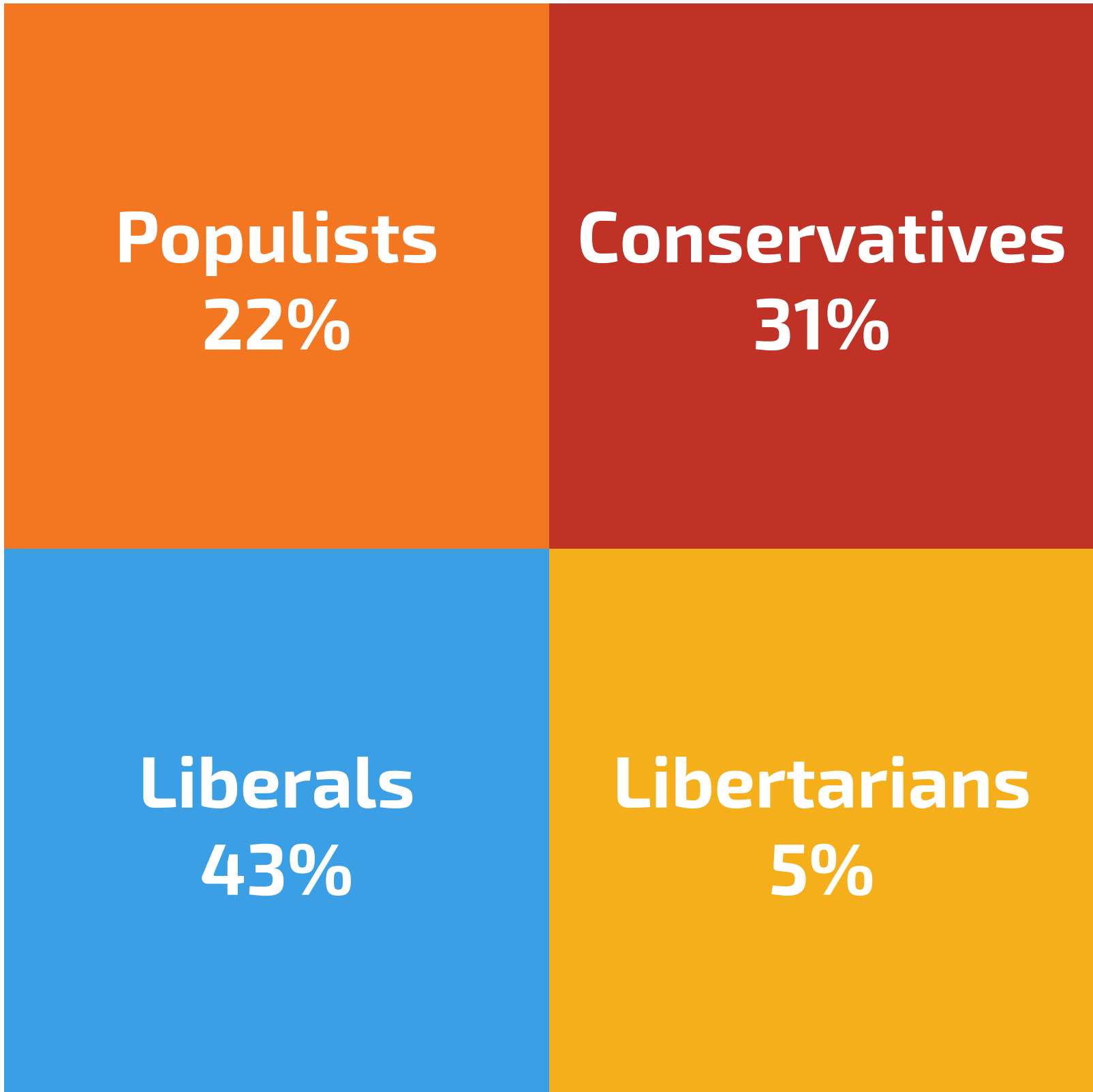


Social Index by Party



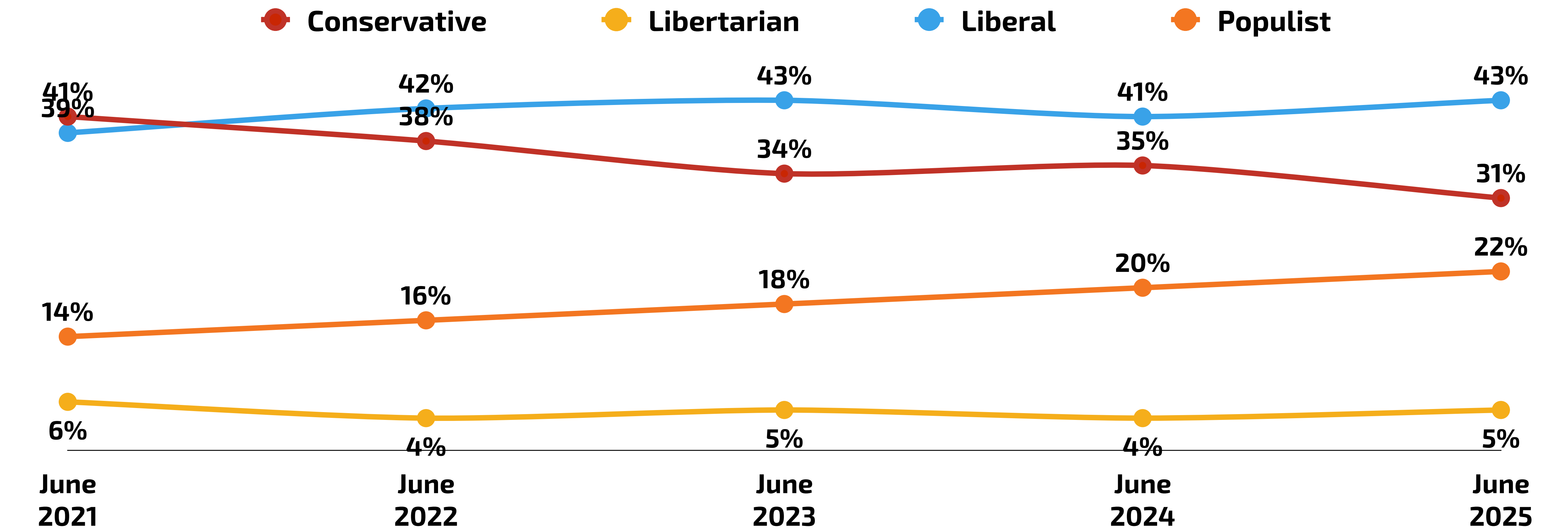
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22% of voters are culturally conservative and economically liberal, while only 5% are culturally liberal and economically conservative



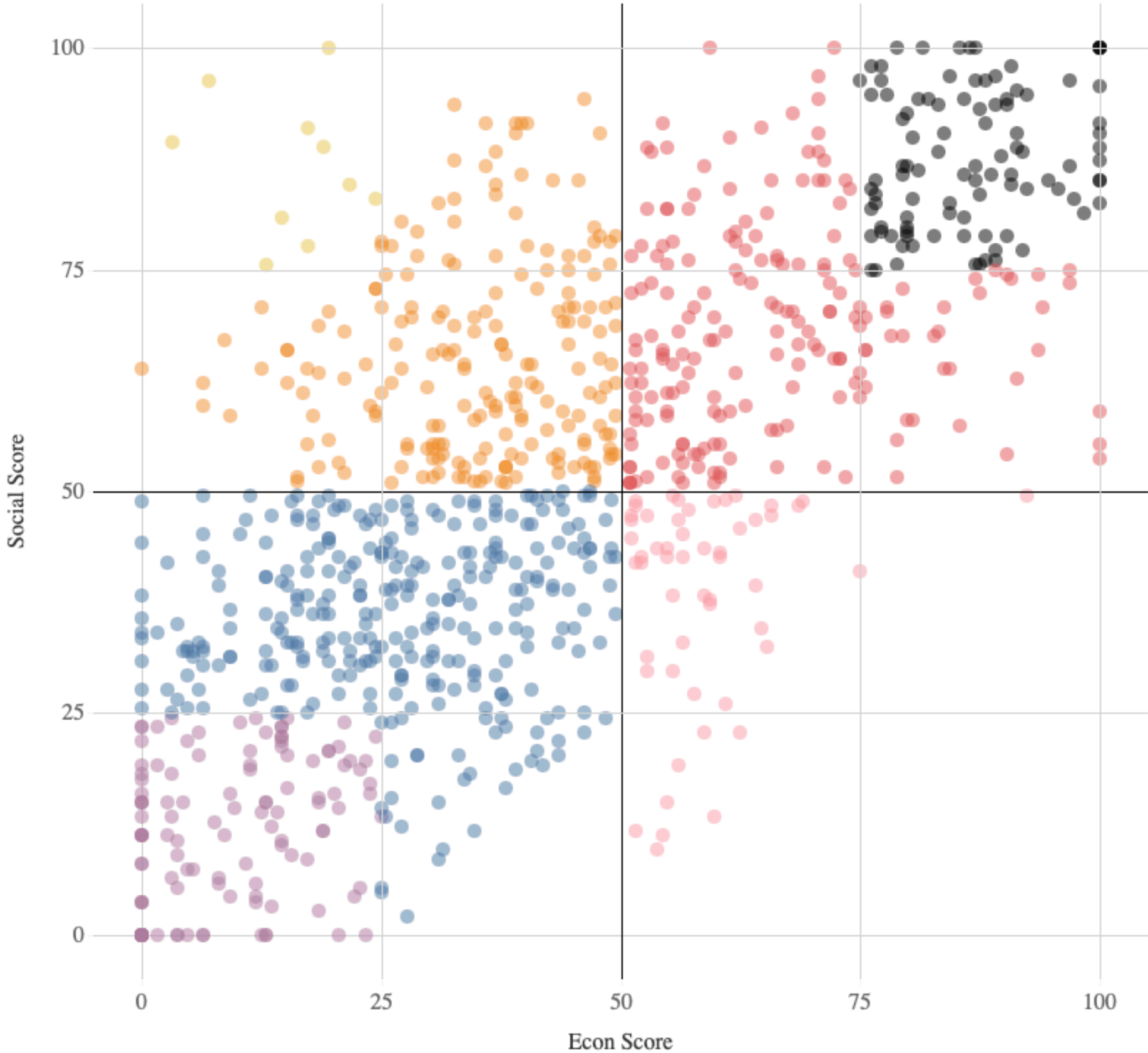
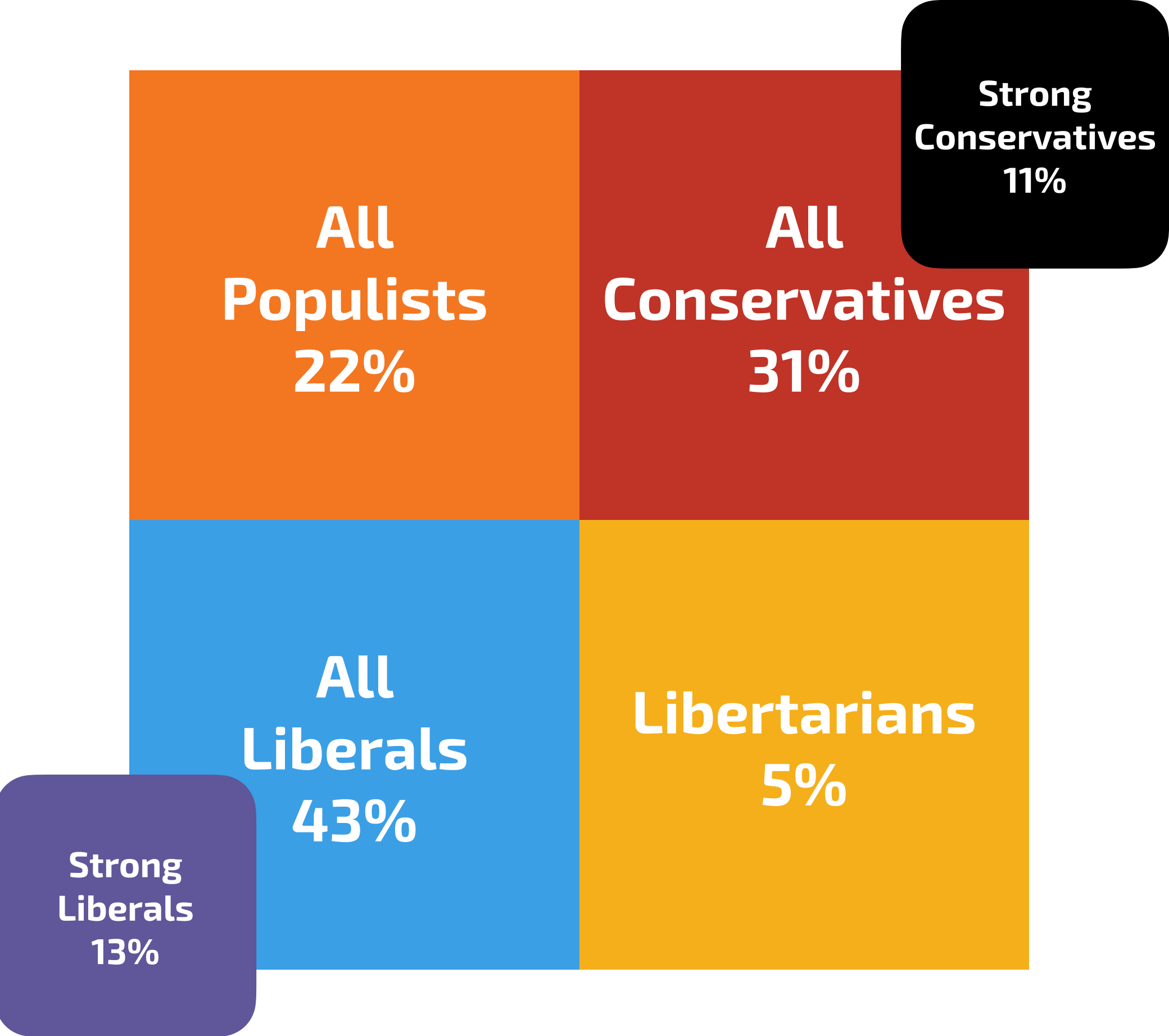
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The Populist share of the electorate has grown since 2021, while the Conservative bloc has declined



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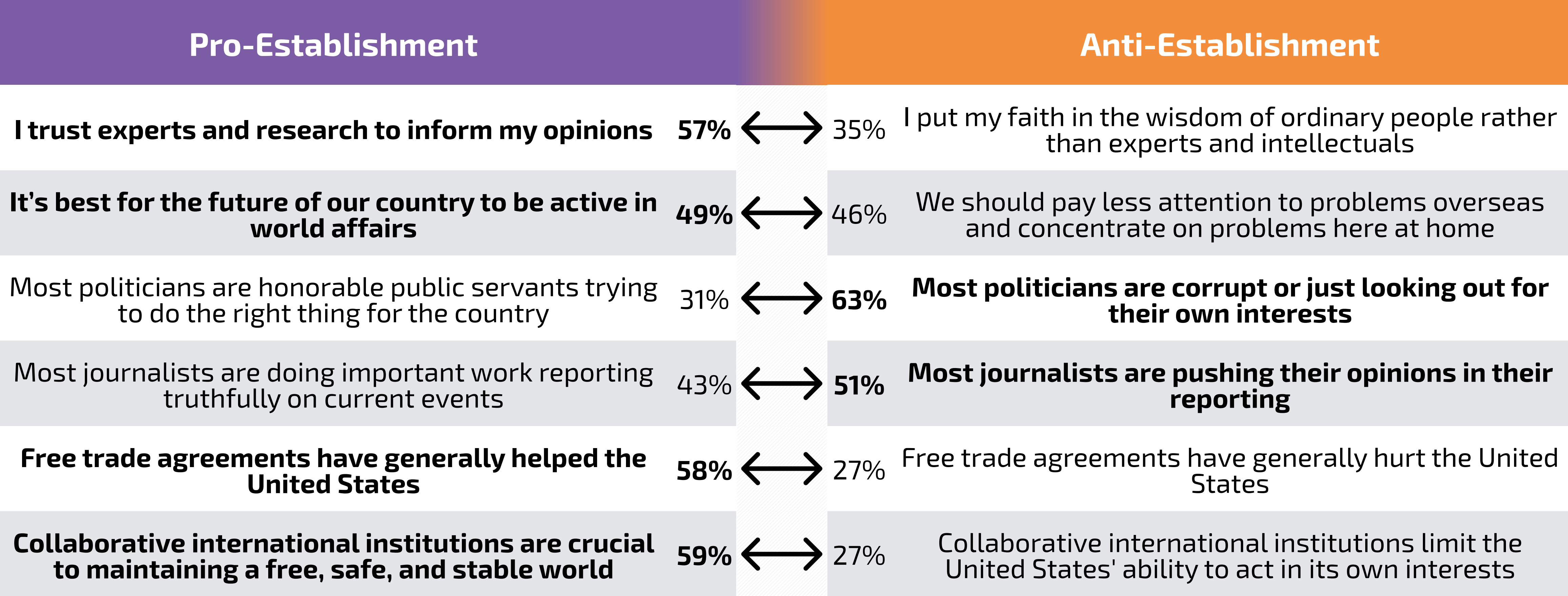
Strong Conservatives and Strong Liberals make up 11% and 13% of the electorate respectively



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Establishment index - New for 2025

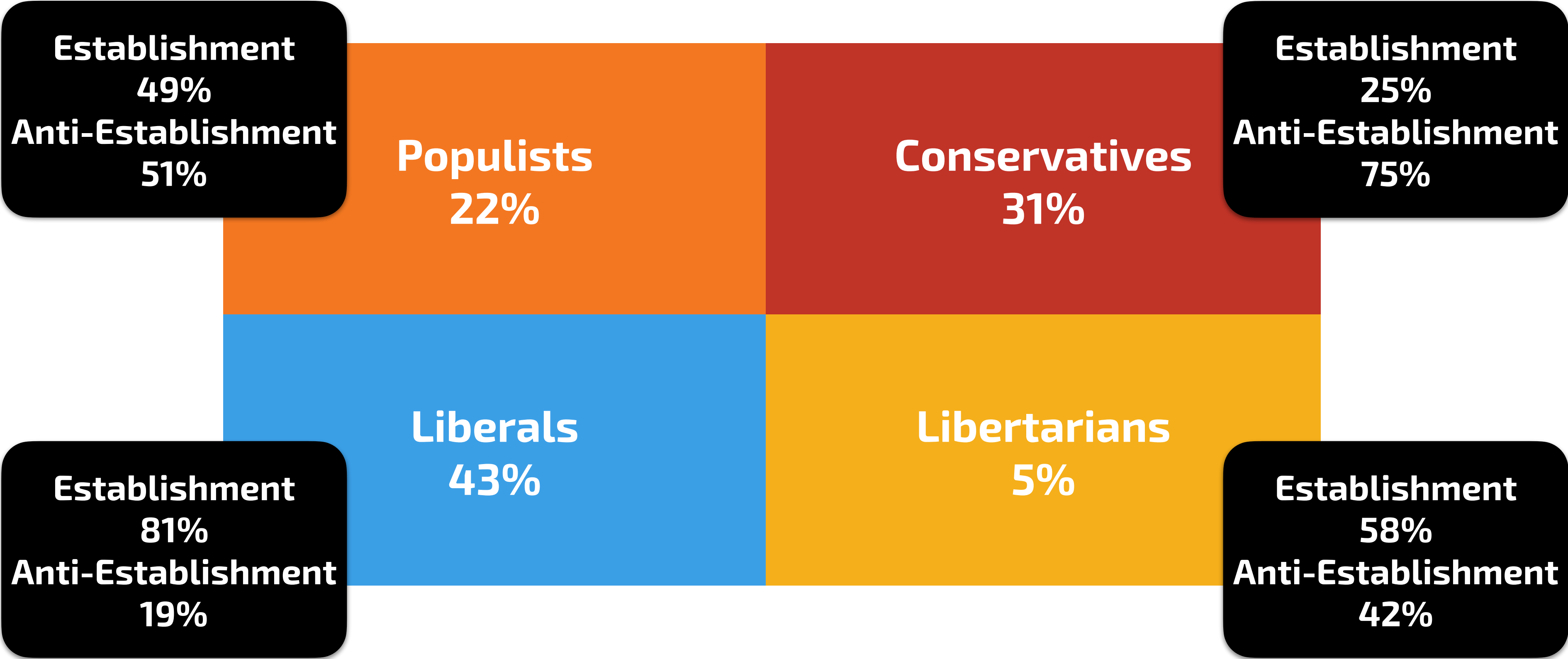
Voters were asked if they agreed more with the more pro- or anti-establishment stances on a variety of issues.



Note: Unsure not included
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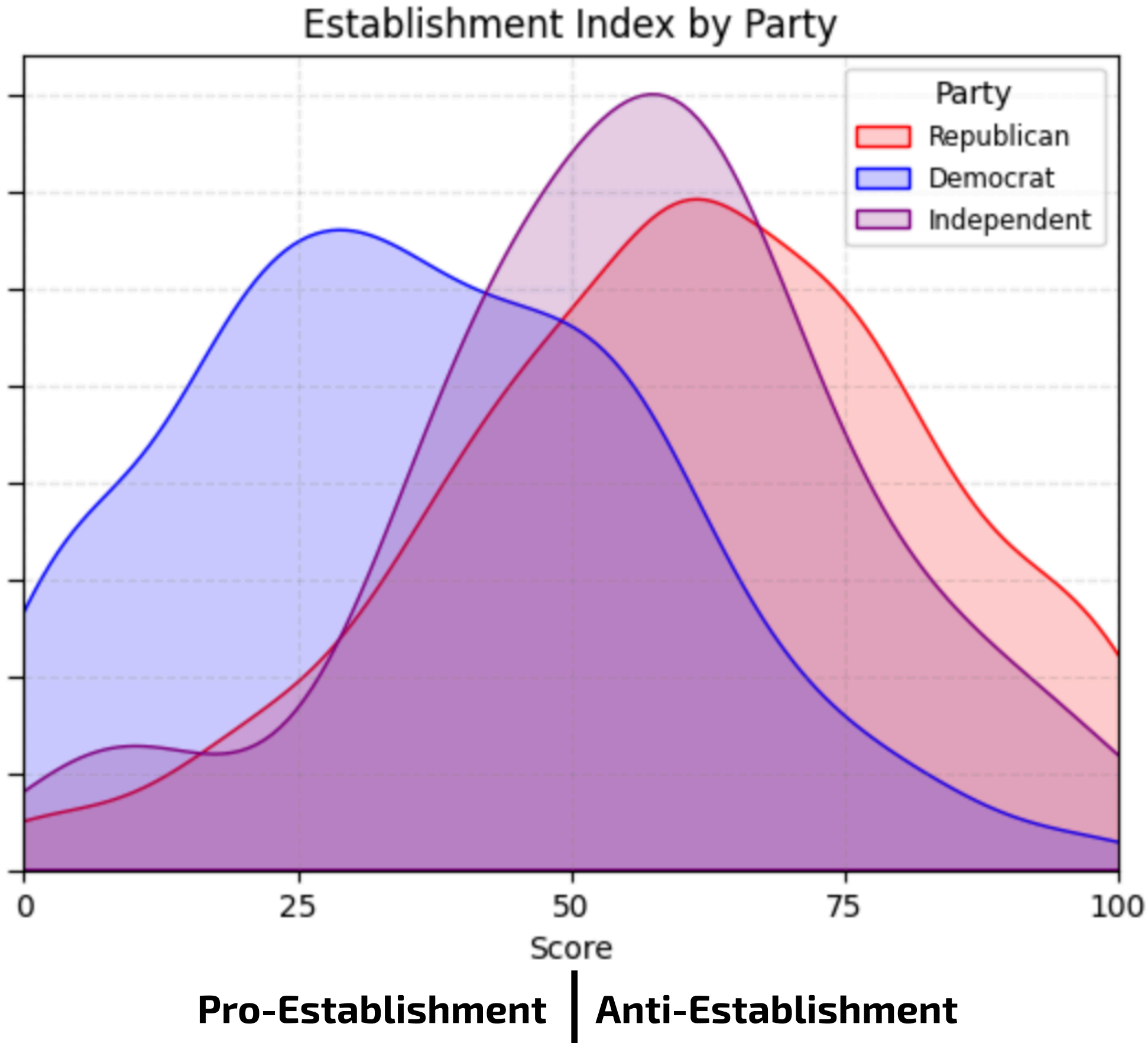
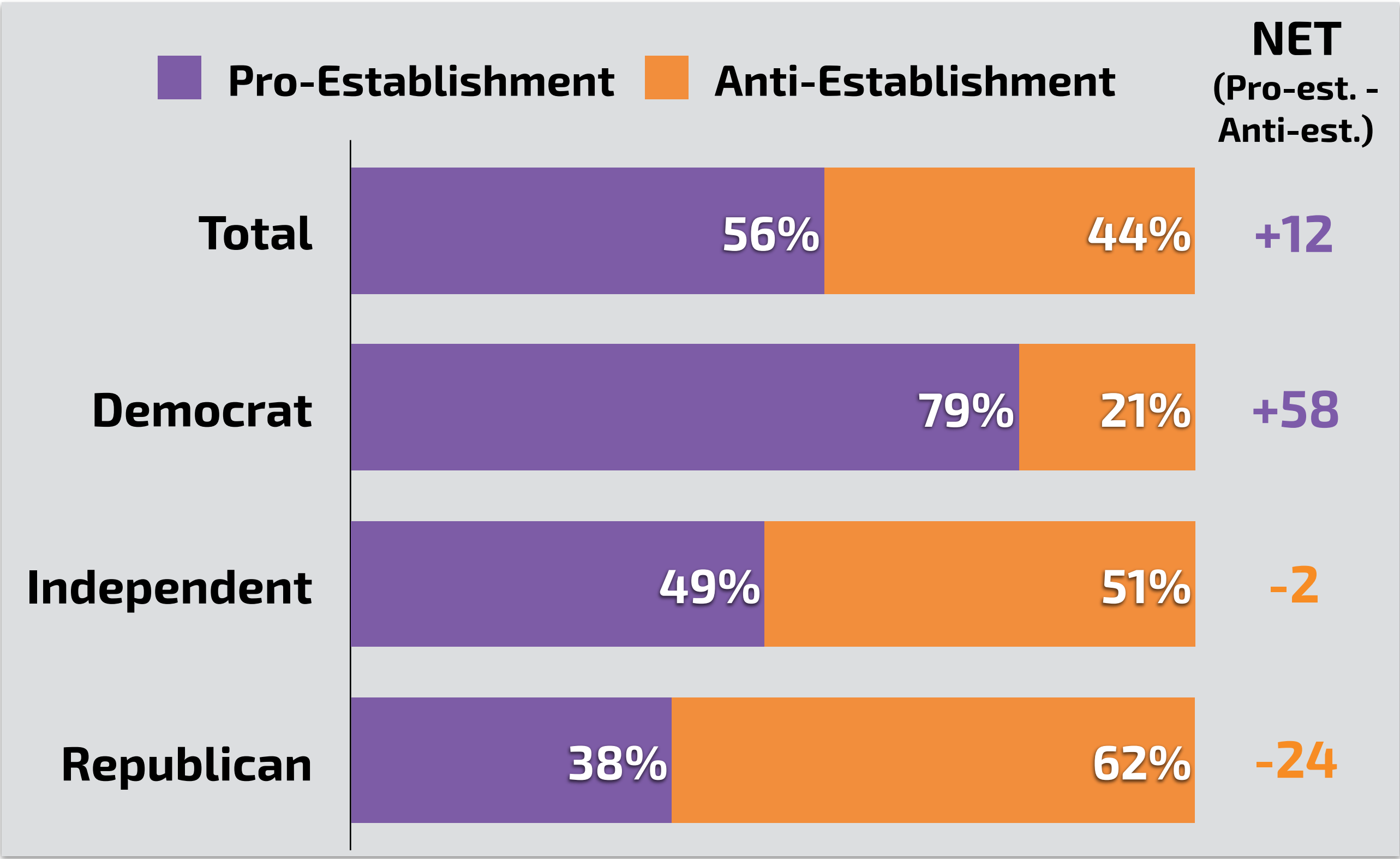
Conservatives are anti-establishment; Liberals are pro-establishment

Voters were then further grouped into four quadrants based on how they answered the 6 establishment questions in the June 2025 Echelon Insights Verified Voter Omnibus.



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Democrats are distinctly pro-establishment, while Republicans are more anti-establishment



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Demographics of the four quadrants

	Voters Overall	Conservatives	Populists	Liberals	Libertarians
Gender	46% male 54% female	54% male 45% female	49% male 51% female	39% male 61% female	31% male 69% female
Age	43% under 50 57% 50+	43% under 50 57% 50+	44% under 50 56% 50+	42% under 50 59% 50+	42% under 50 58% 50+
Race	76% White 13% Black 11% Hispanic/Latino	85% White 7% Black 6% Hispanic/Latino	79% White 13% Black 12% Hispanic/Latino	64% White 21% Black 13% Hispanic/Latino	73% White 15% Black 22% Hispanic/Latino
Income	39% <\$50k/yr 59% >\$50k/yr	29% <\$50k/yr 71% >\$50k/yr	50% <\$50k/yr 47% >\$50k/yr	46% <\$50k/yr 53% >\$50k/yr	35% <\$50k/yr 65% >\$50k/yr
Urbanicity	31% City 44% Suburb 26% Small town/rural	24% City 47% Suburb 28% Small town/rural	36% City 38% Suburb 25% Small town/rural	37% City 38% Suburb 24% Small town/rural	24% City 54% Suburb 22% Small town/rural
Education	60% Non-College 40% College	59% Non-College 42% College	67% Non-College 33% College	65% Non-College 35% College	58% Non-College 41% College



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Demographics of Strong Liberals and Conservatives

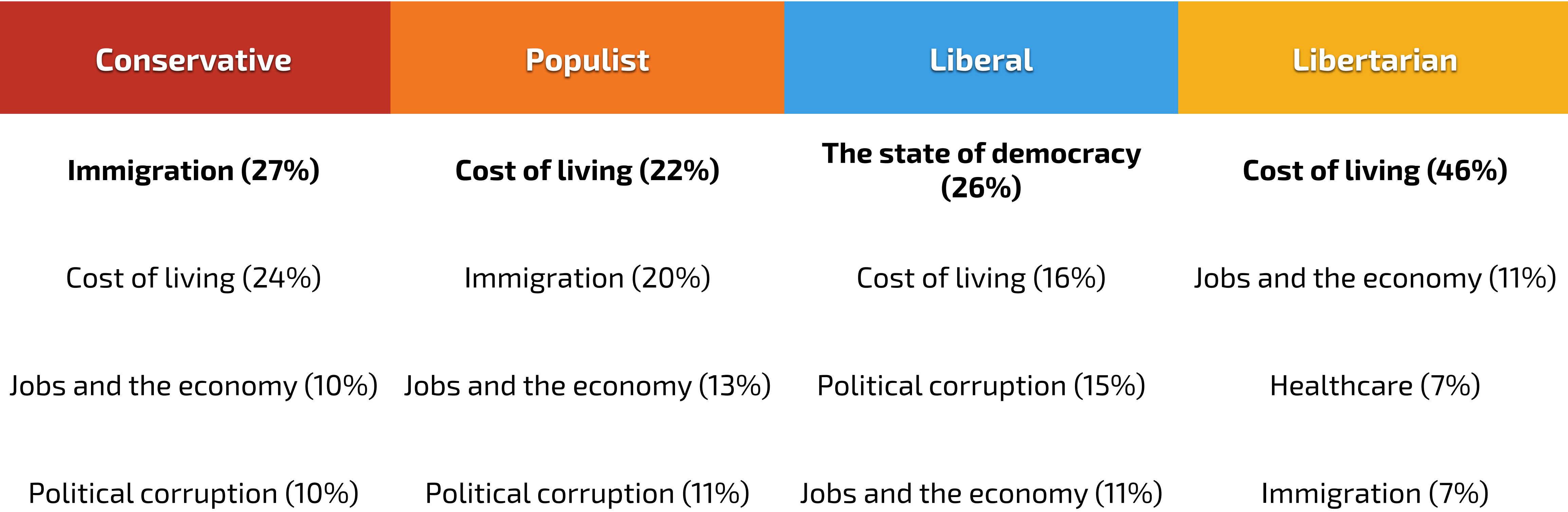
	Voters Overall	Strong Cultural Liberals	Strong Economic Liberals	Strong Cultural Conservatives	Strong Economic Conservatives
Gender	46% male 54% female	31% male 68% female	38% male 62% female	64% male 36% female	65% male 35% female
Age	43% under 50 57% 50+	60% under 50 41% 50+	47% under 50 54% 50+	33% under 50 67% 50+	26% under 50 74% 50+
Race	76% White 13% Black 11% Hispanic/Latino	67% White 20% Black 15% Hispanic/Latino	73% White 17% Black 12% Hispanic/Latino	88% White 2% Black 6% Hispanic/Latino	88% White 2% Black 7% Hispanic/Latino
Income	39% <\$50k/yr 59% >\$50k/yr	34% <\$50k/yr 63% >\$50k/yr	45% <\$50k/yr 53% >\$50k/yr	35% <\$50k/yr 64% >\$50k/yr	23% <\$50k/yr 77% >\$50k/yr
Urbanicity	31% City 44% Suburb 26% Small town/rural	34% City 47% Suburb 18% Small town/rural	36% City 39% Suburb 25% Small town/rural	21% City 46% Suburb 33% Small town/rural	19% City 55% Suburb 27% Small town/rural
Education	60% Non-College 40% College	47% Non-College 53% College	55% Non-College 45% College	59% Non-College 40% College	47% Non-College 53% College



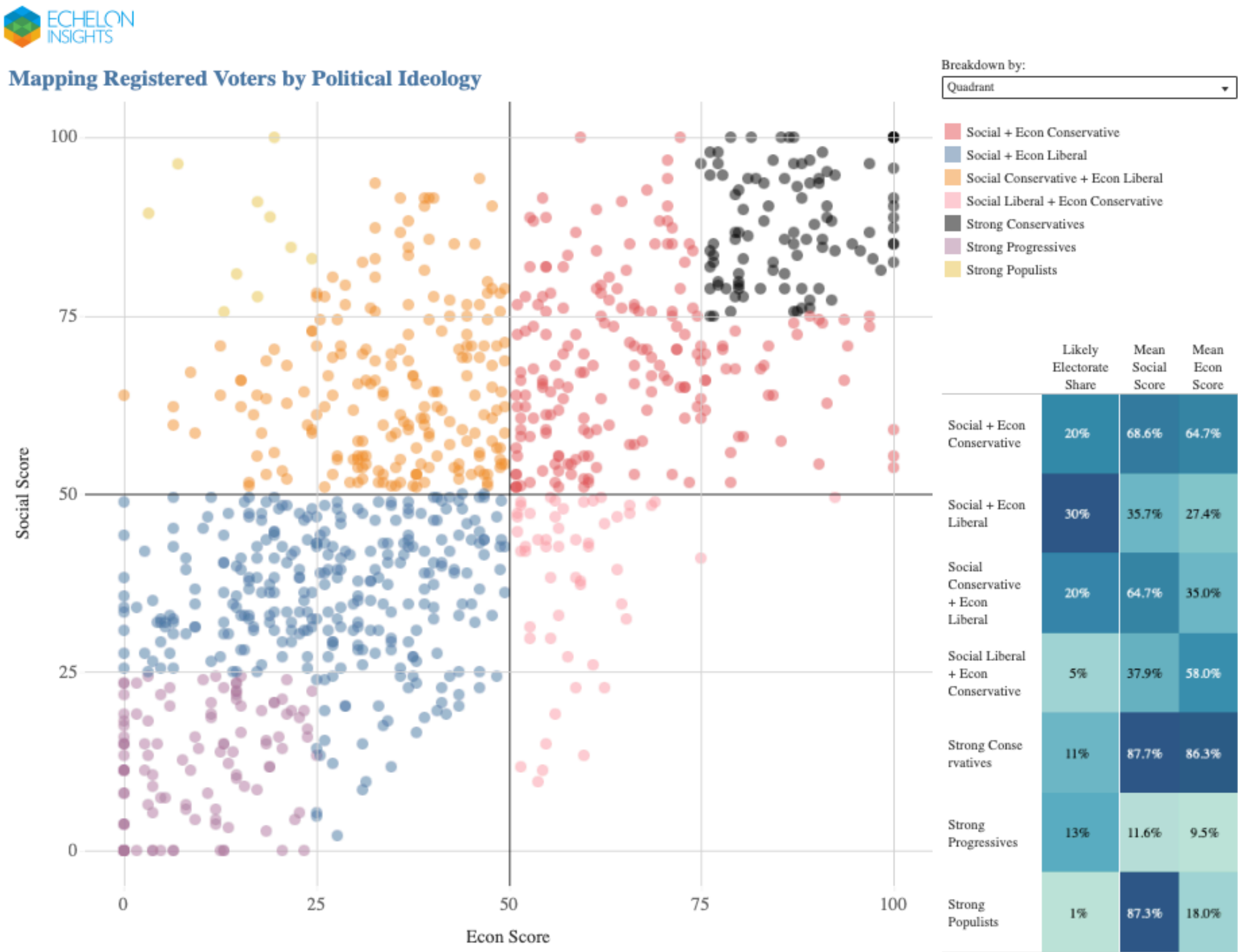
Note: “Strong” economic and cultural conservatives scored above a 75 on their respective scales, and “strong” economic and cultural liberals scored below a 25 on their respective scales.
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Voters across political quadrants cite the cost of living and jobs and the economy as two of the biggest issues facing the country today

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



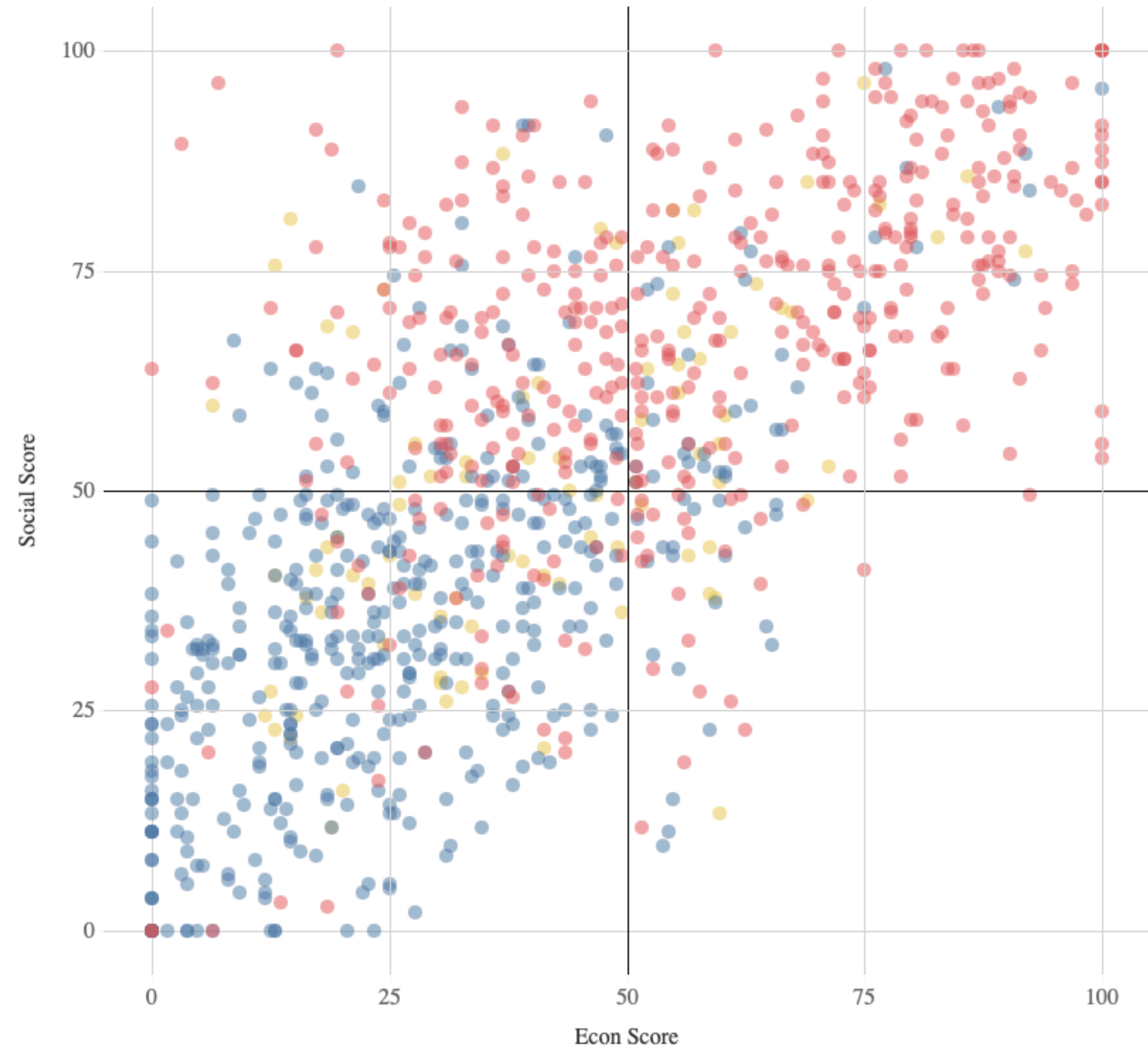
An Interactive
Tableau of the
quadrants with
information on
party, race, age, and
more can be found
here:
<https://tinyurl.com/4f9ynjwu>



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Quadrants by party identification

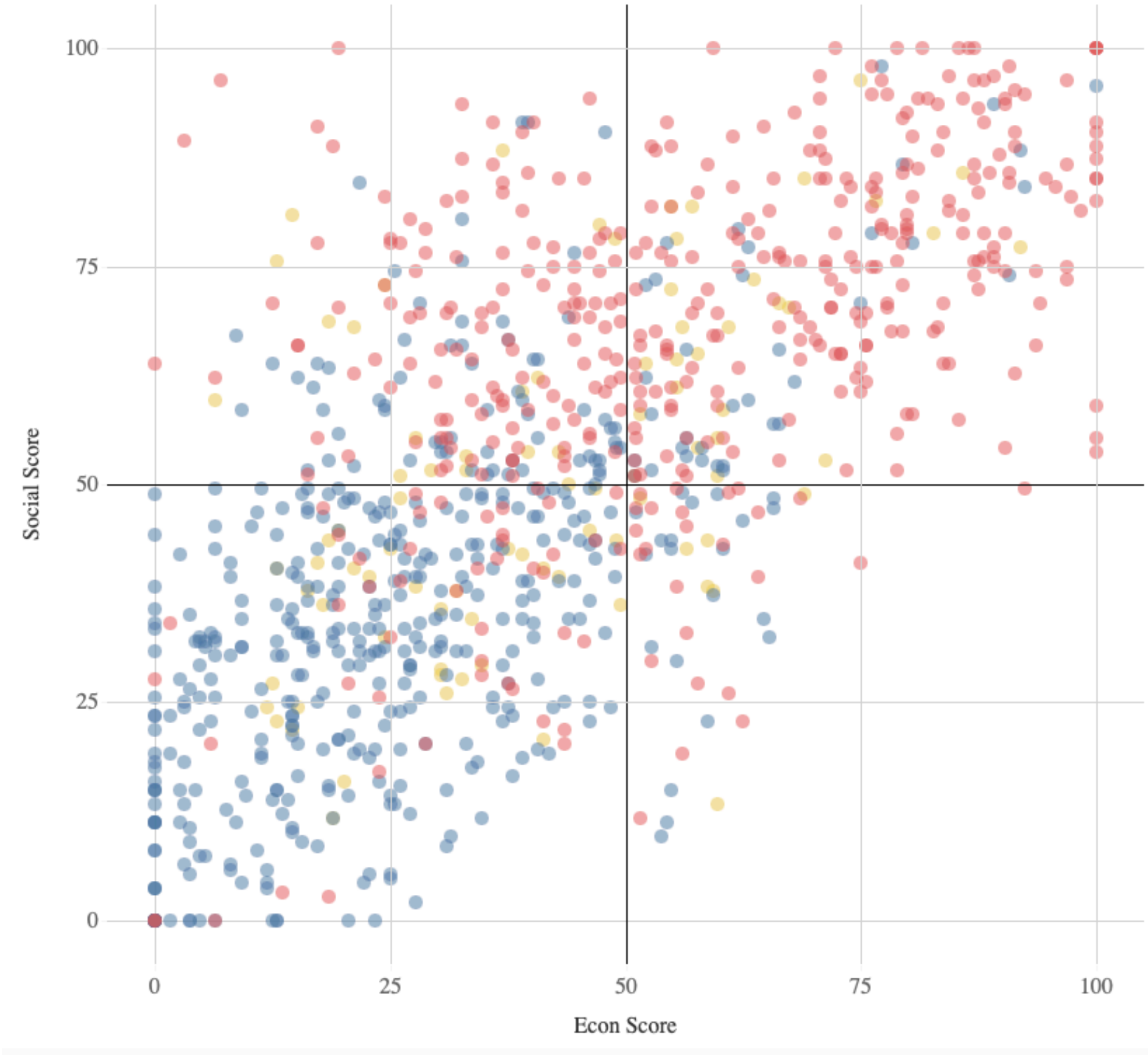
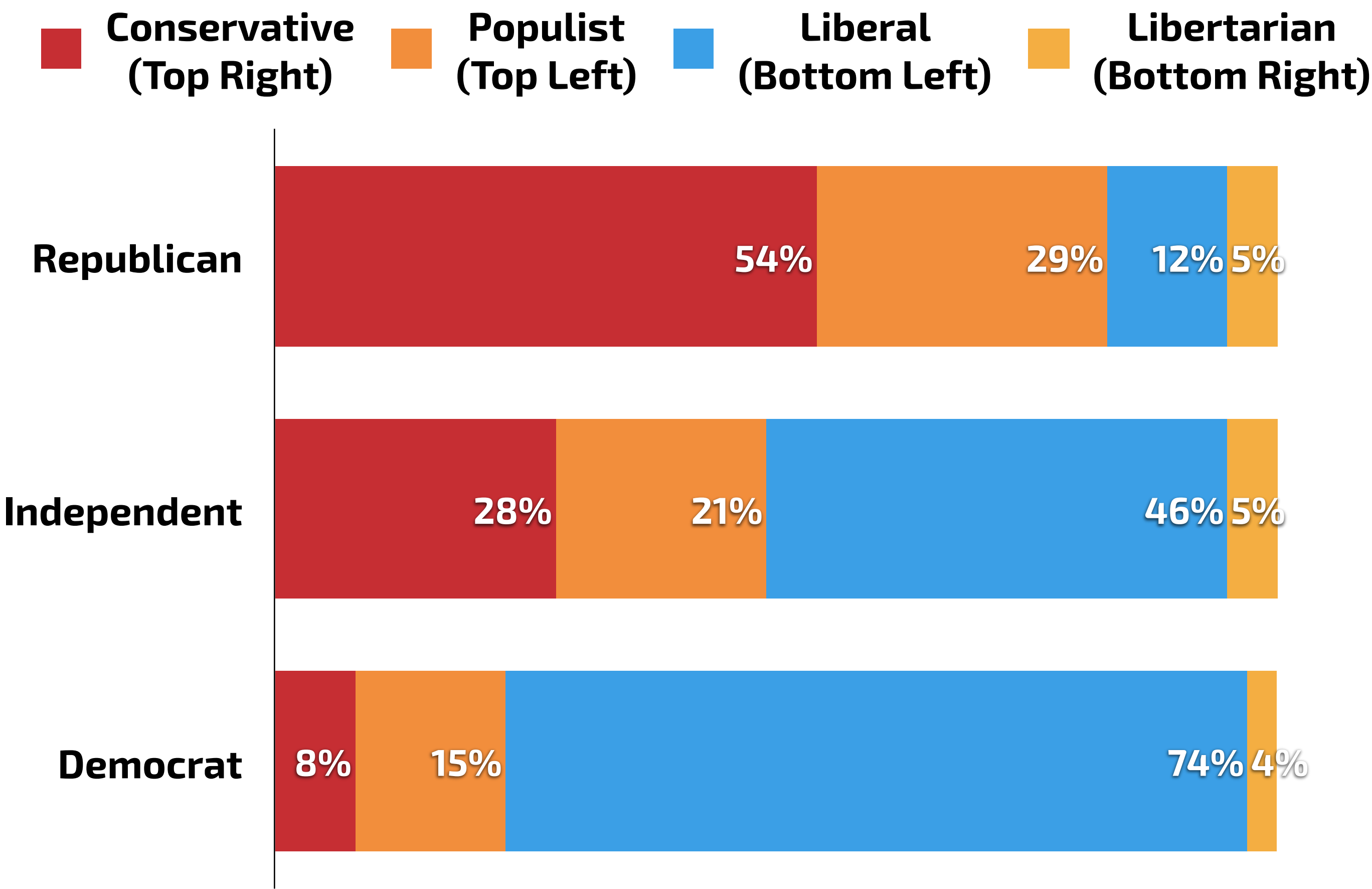
- 70% of those in Conservative quadrant are Republicans, and 63% of the voters in the Liberal quadrant are Democrats.
- Republicans (47%) are more common than Democrats (29%) in the Libertarian quadrant.



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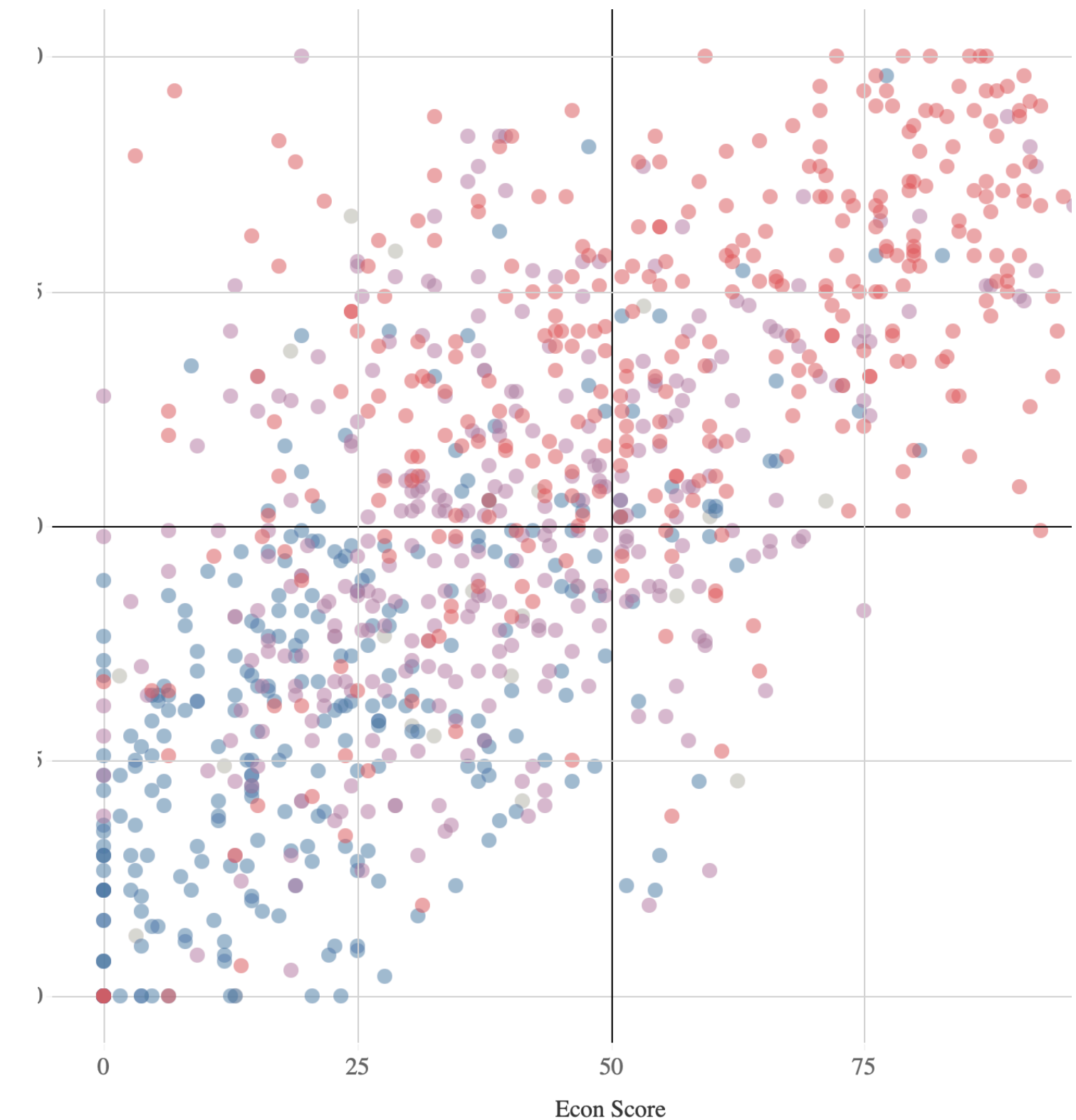
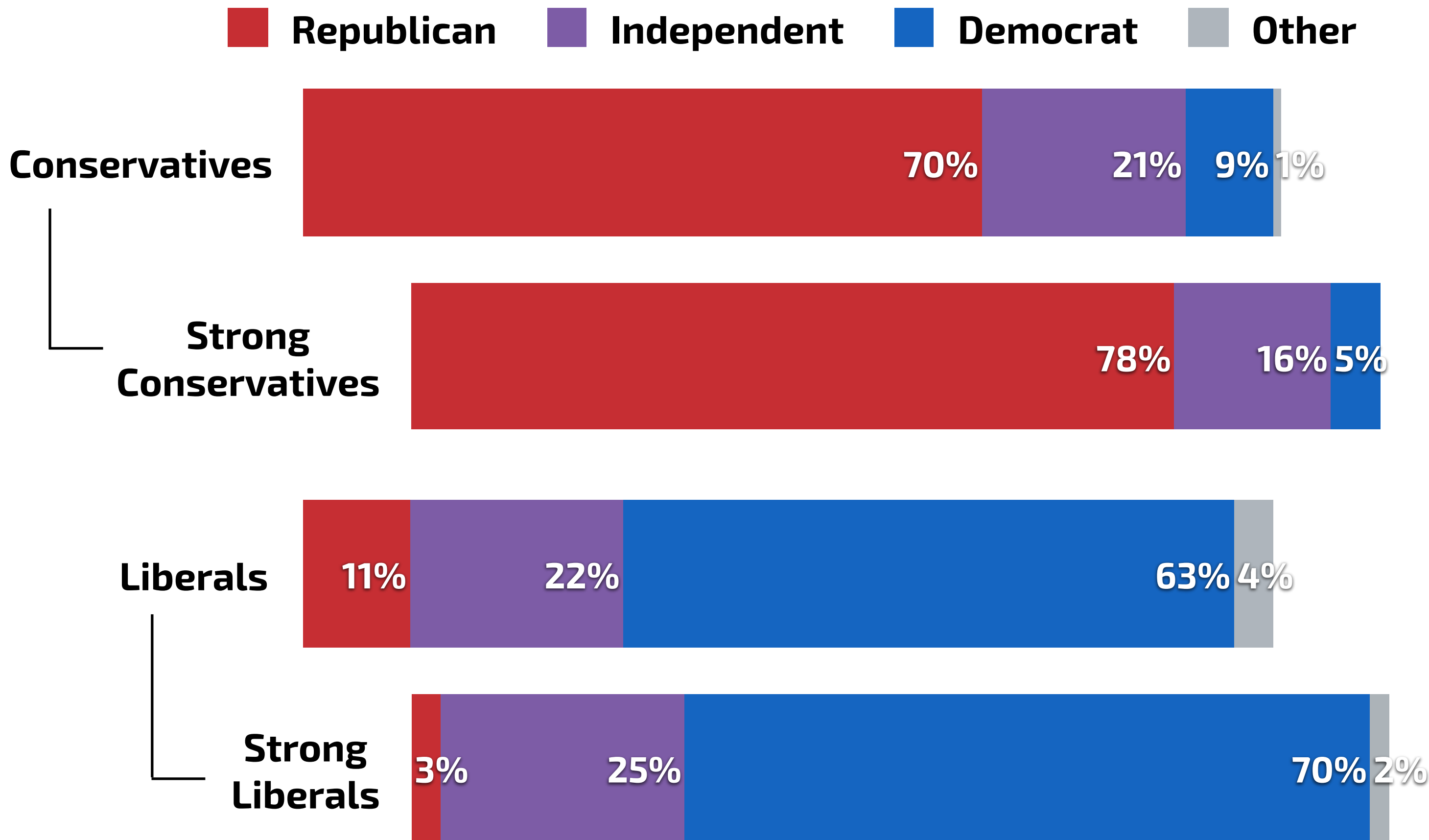


74% of Democrats are in the Liberal quadrant and 54% of Republicans are in the Conservative quadrant



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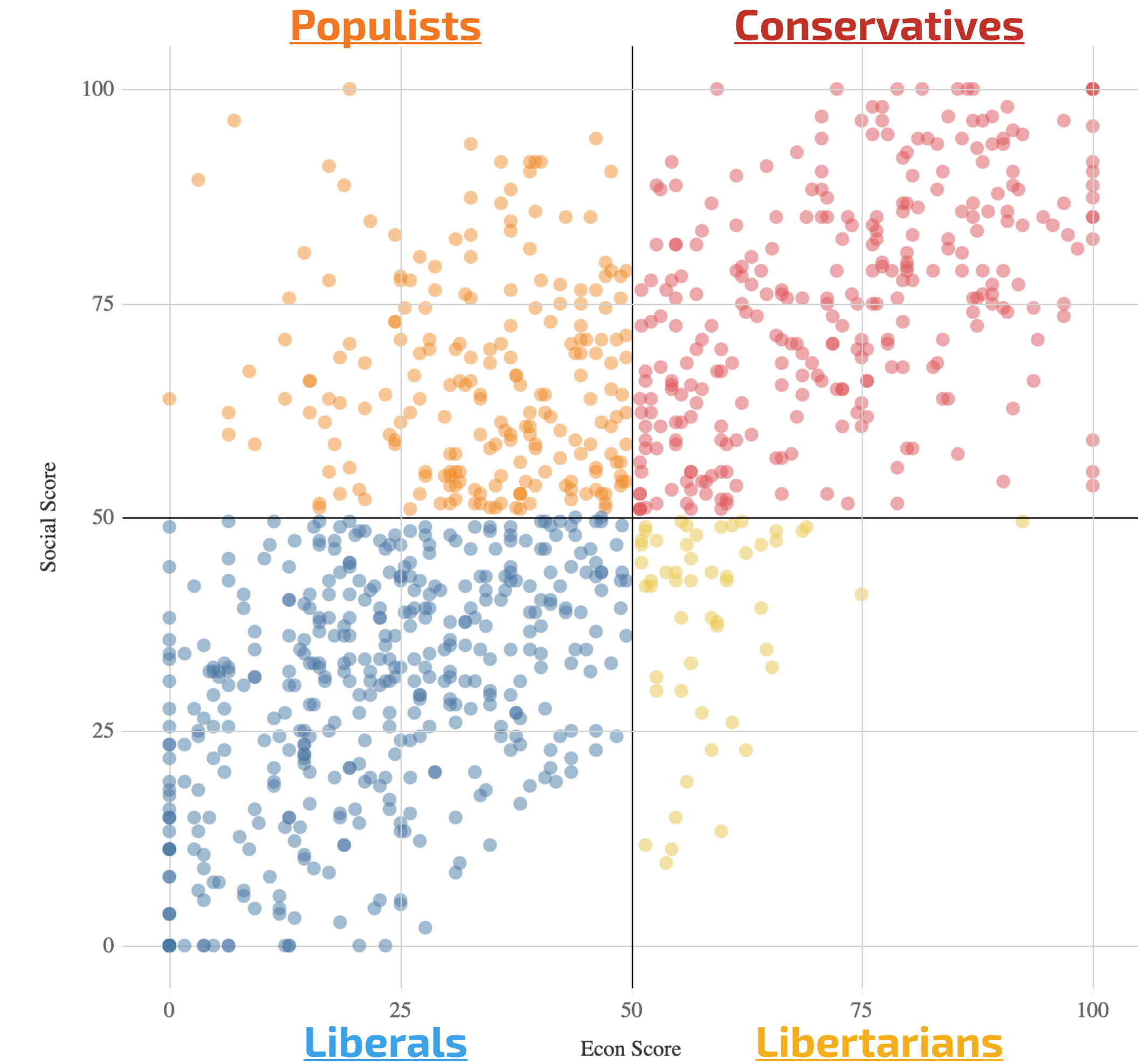
70% of Conservatives identify as Republicans and 63% of Liberals identify as Democrats; higher numbers among Strong Liberals and Conservatives



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Quadrants by political ideology

- 74% of Conservatives identify as **ideologically conservative**, while only 52% of Liberals identify as **ideologically liberal**.
- On the flip side, 11% of Liberals identify as **ideologically conservative**, while 6% of conservatives identify as **ideologically liberal**.
- 45% of Populists identify as conservative, while 12% identify as liberal.

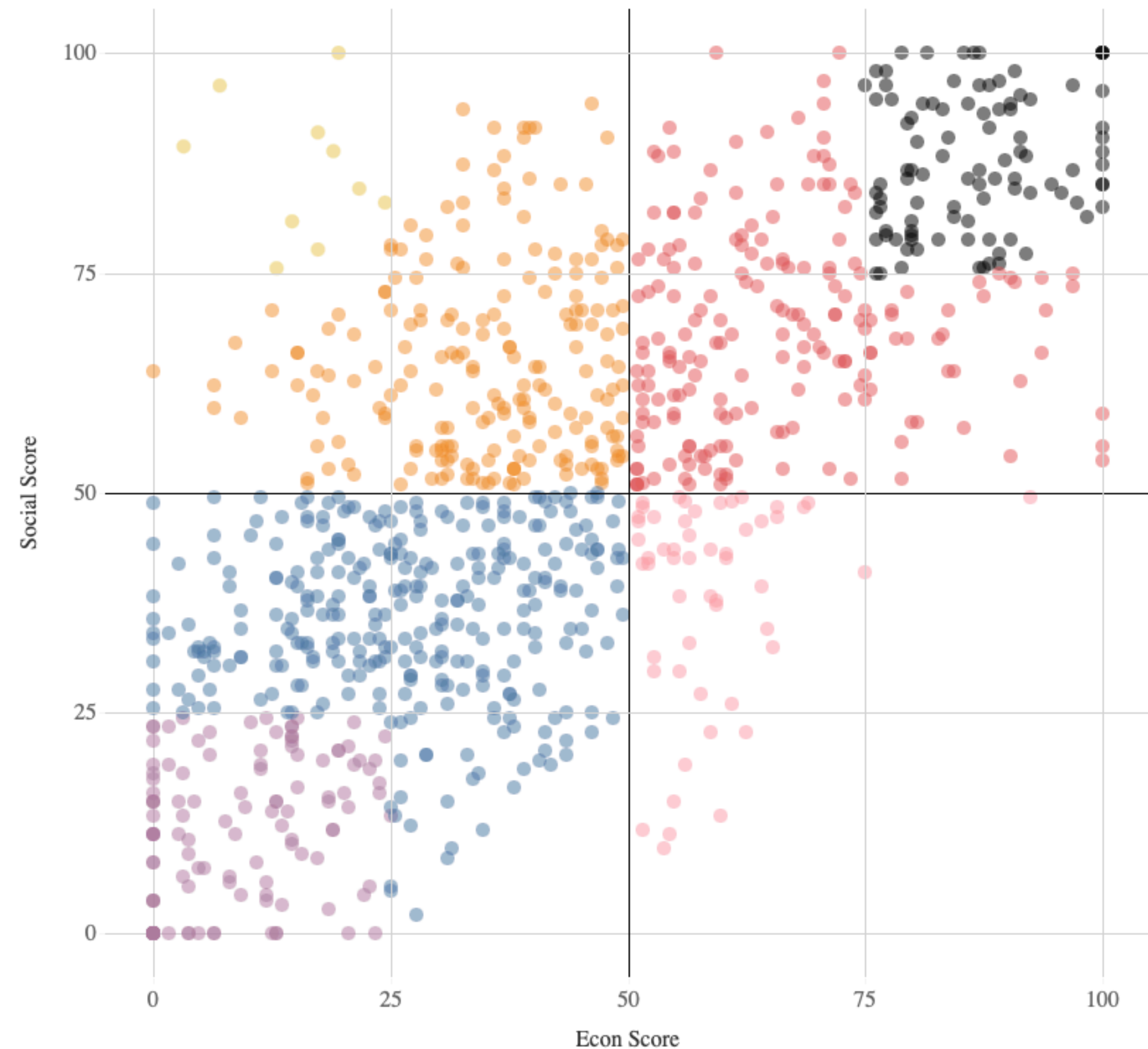


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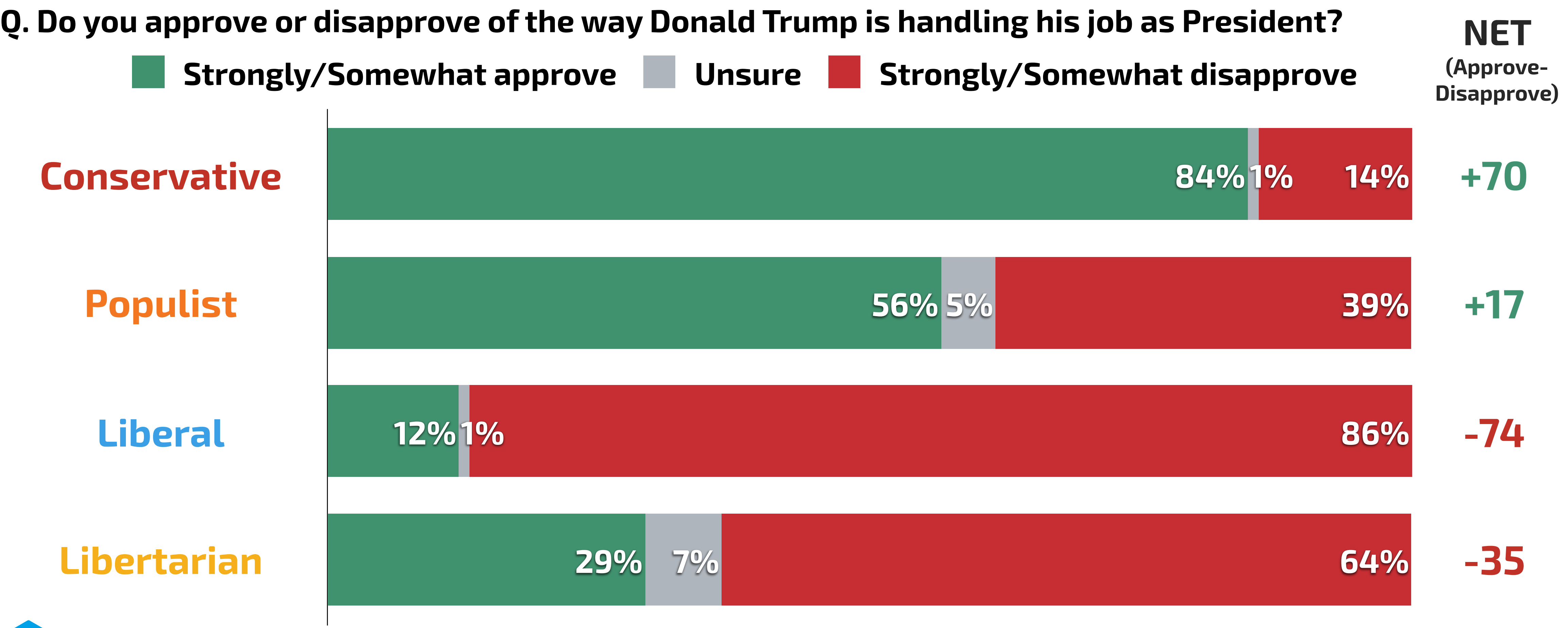
2024 presidential election

- In the 2024 presidential election, according to self-reported vote, Trump won Populists, getting 67% of their vote compared to Harris' 32%.
- However, Trump lost Libertarians, winning only 38% of their vote compared to Harris' 57%.



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Conservatives emphatically approve of Donald Trump; Liberals and Libertarians firmly disapprove



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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.

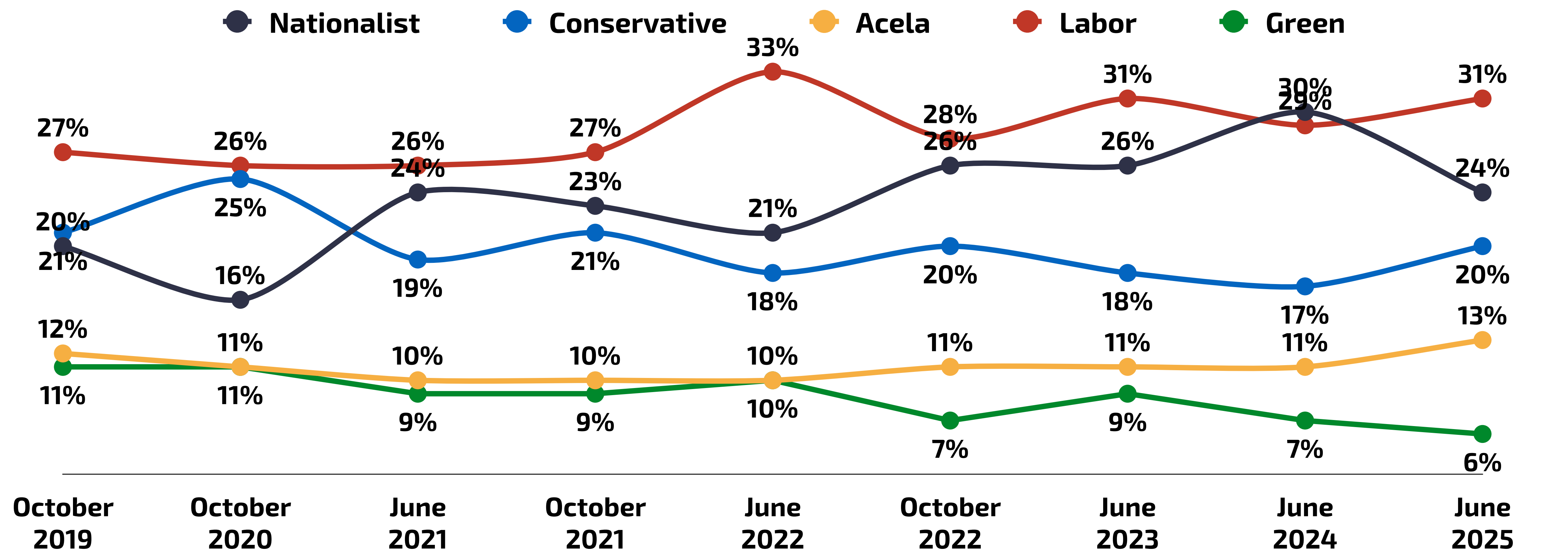
PARTY	LEADER	SUPPORT	DESCRIPTION
NATIONALIST		24%	Stop illegal immigration, put America First, stand up to political correctness, and end unfair trade deals
CONSERVATIVE		20%	Defend the American system of free enterprise, promote traditional family values, and ensure a strong military
ACELA		13%	Advance 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




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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.





Note: The October 2019, June 2021, and October 2021 surveys are weighted to Registered Voters, all others are weighted to Likely Electorate. Unsure not included.
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Demographics of America's multi-party democracy

	Voters Overall	Green	Labor	Acela	Conservative	Nationalist
Gender	46% male 54% female	54% male 46% female	42% male 58% female	34% male 65% female	56% male 44% female	51% male 49% female
Age	43% under 50 57% 50+	62% under 50 38% 50+	45% under 50 56% 50+	52% under 50 48% 50+	35% under 50 65% 50+	42% under 50 57% 50+
Race	76% White 13% Black 11% Hispanic/Latino	66% White 11% Black 9% Hispanic/Latino	73% White 18% Black 12% Hispanic/Latino	77% White 18% Black 18% Hispanic/Latino	80% White 8% Black 7% Hispanic/Latino	79% White 8% Black 9% Hispanic/Latino
Income	39% <\$50k/yr 59% >\$50k/yr	34% <\$50k/yr 64% >\$50k/yr	43% <\$50k/yr 56% >\$50k/yr	38% <\$50k/yr 62% >\$50k/yr	34% <\$50k/yr 64% >\$50k/yr	37% <\$50k/yr 63% >\$50k/yr
Urbanicity	31% City 44% Suburb 26% Small town/rural	41% City 38% Suburb 20% Small town/rural	35% City 43% Suburb 22% Small town/rural	39% City 38% Suburb 23% Small town/rural	21% City 49% Suburb 30% Small town/rural	24% City 49% Suburb 28% Small town/rural
Education	60% Non-College 40% College	38% Non-College 62% College	62% Non-College 38% College	53% Non-College 48% College	56% Non-College 43% College	62% Non-College 38% College



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“The state of democracy” is a top issue for left-leaning parties, while right-leaning parties remain most concerned about immigration

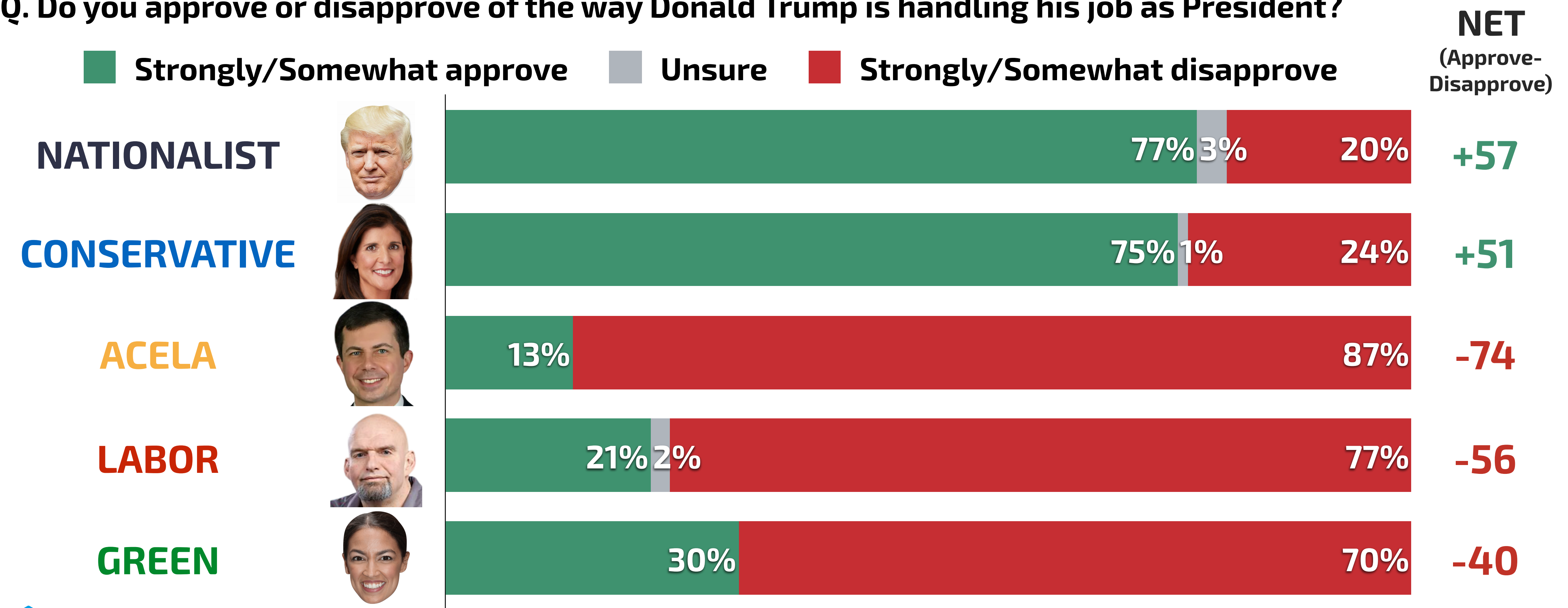
Q. If you had to choose just one, which would you say is the biggest issue facing the country today?

Green	Labor	Acela	Conservative	Nationalist
The state of democracy (19%)	Cost of living (22%)	The state of democracy (25%)	Immigration (24%)	Immigration (29%)
Cost of living (17%)	The state of democracy (19%)	Cost of living (20%)	Cost of living (23%)	Cost of living (20%)
Jobs and the economy (15%)	Political corruption (13%)	Political corruption (18%)	Jobs and the economy (12%)	Jobs and the economy (9%)
The environment and climate change (13%)	Immigration (9%)	Jobs and the economy (11%)	Political corruption (10%)	Political corruption (9%)



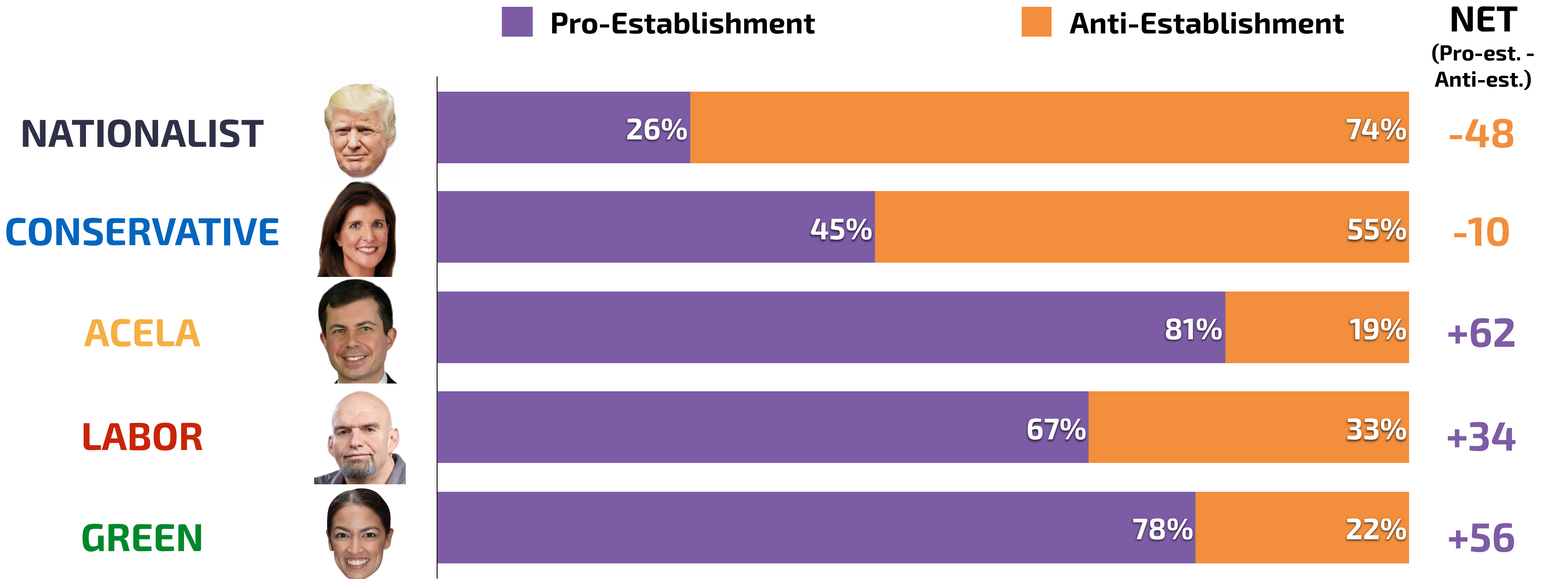
Nationalists and Conservatives overwhelmingly approve of Donald Trump; Acela, Labor, and Green Party voters disapprove

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



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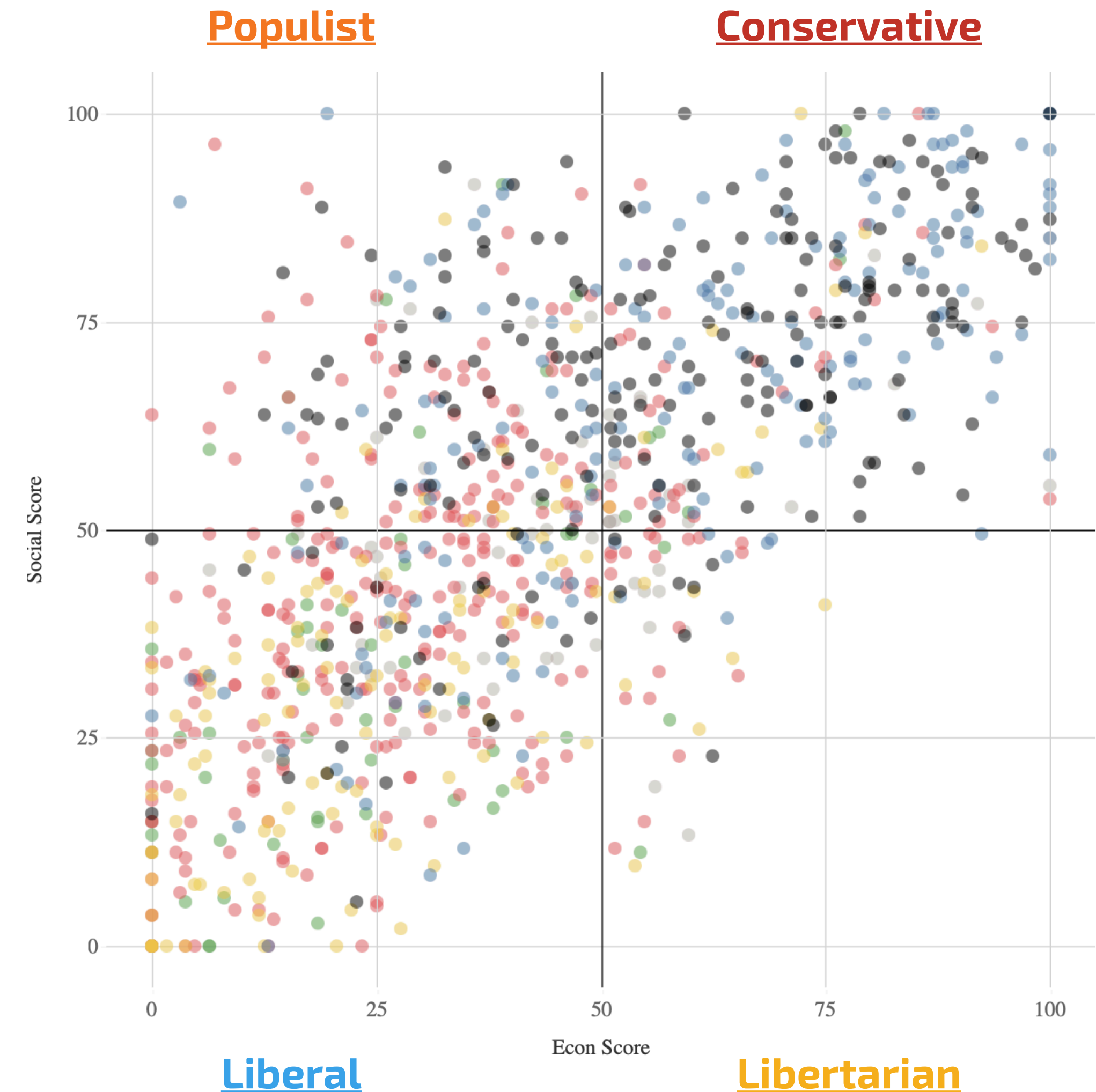
The Nationalist Party is heavily anti-establishment



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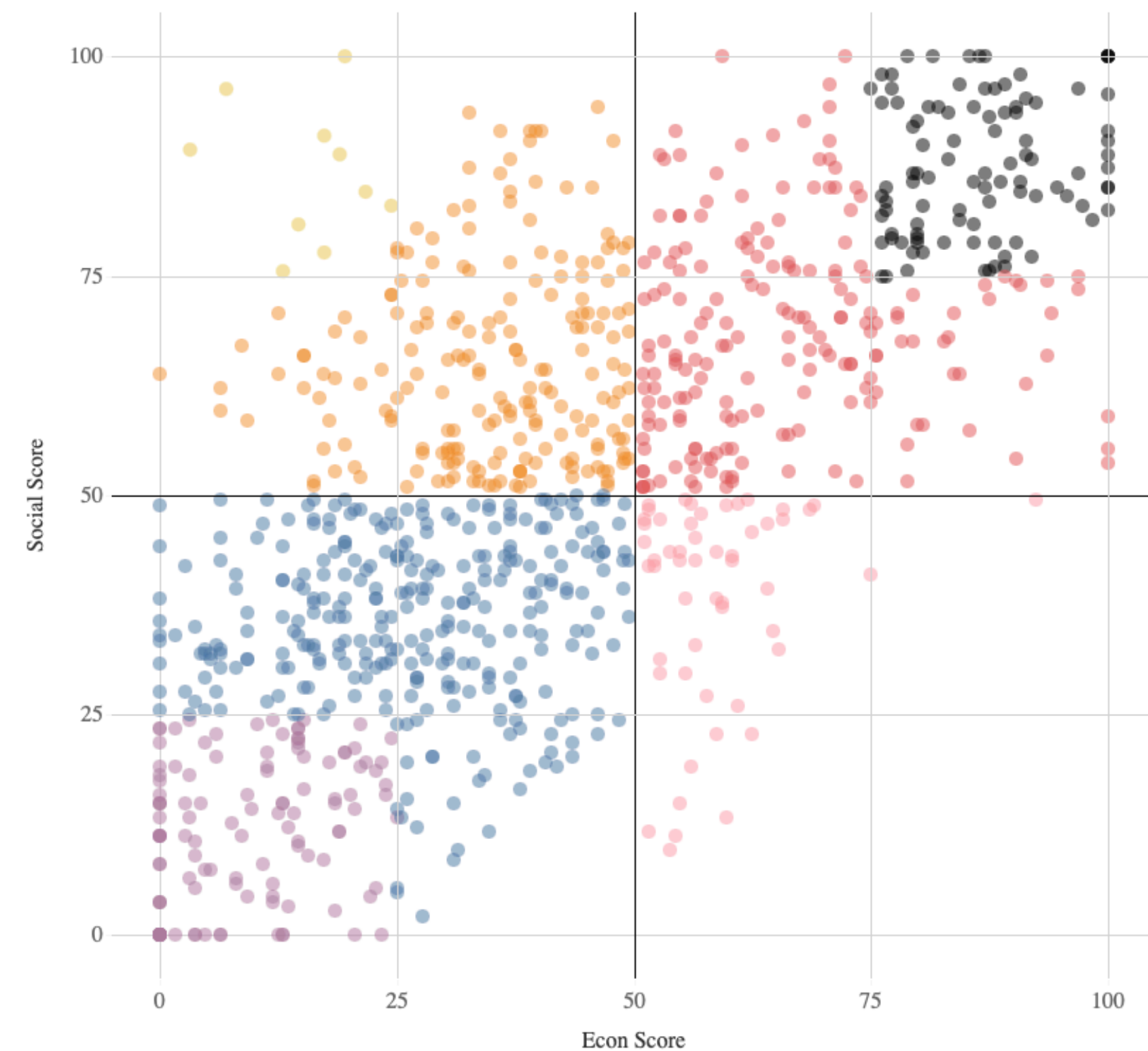
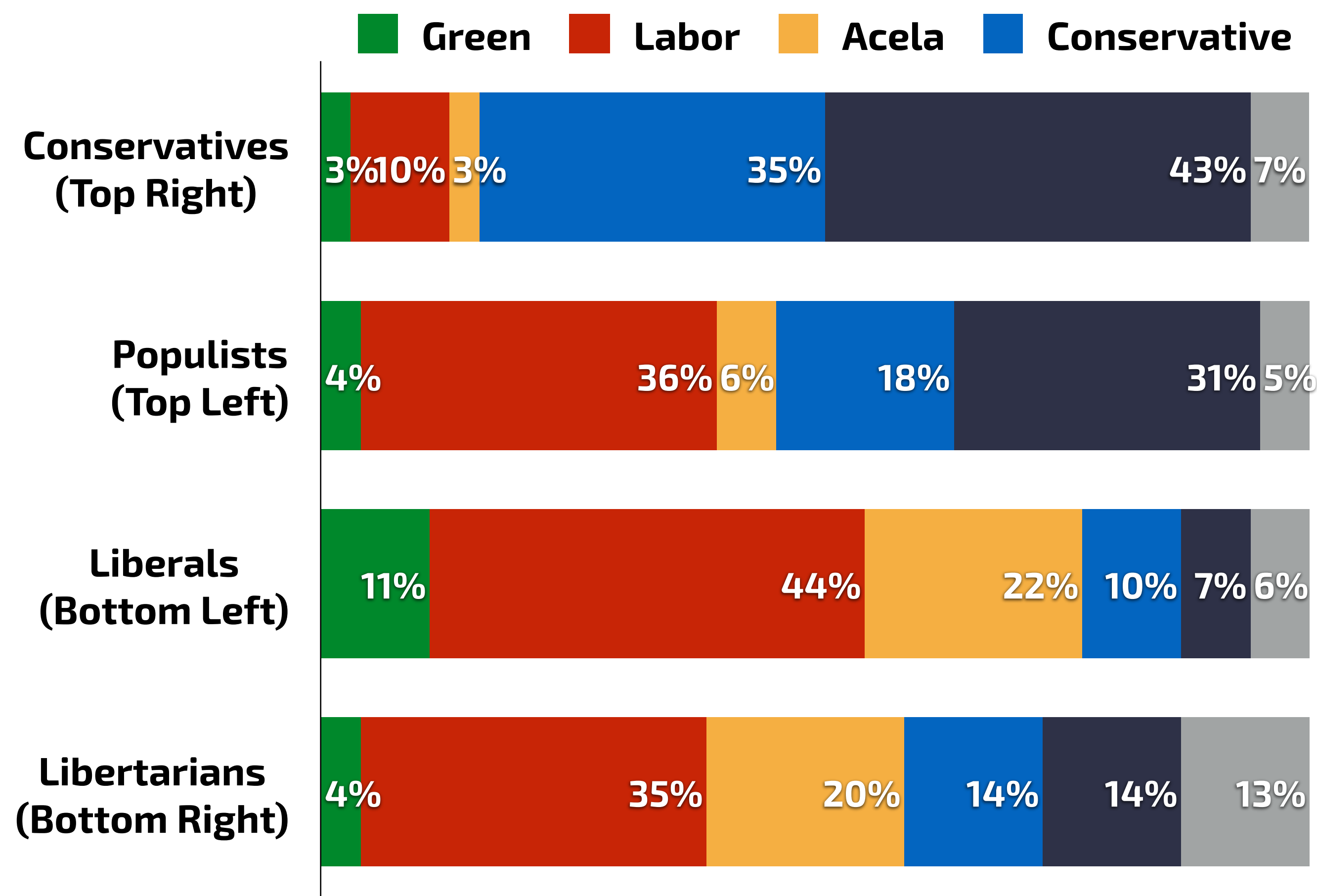
What if American elections had five parties instead of two?

- 78% of the Conservative quadrant overall supports either the Nationalist or Conservative Party, while 88% of Strong Conservatives supports those parties
- 44% of the Liberal quadrant supports the Labor Party; the Acela Party comes in second place at 22%.
- 31% of the Populist quadrant overall support the Nationalist Party, and 52% of Strong Populists support them.



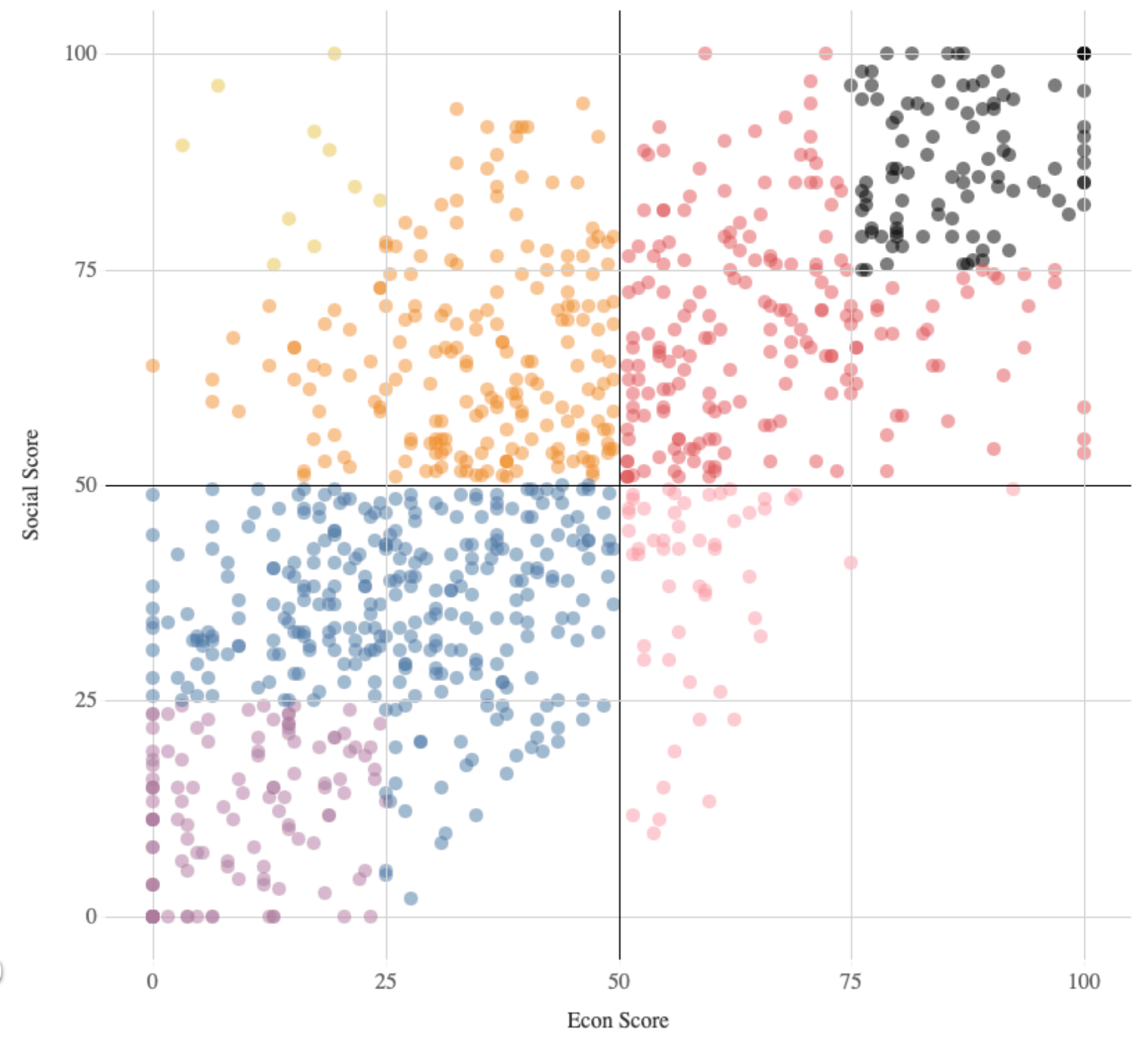
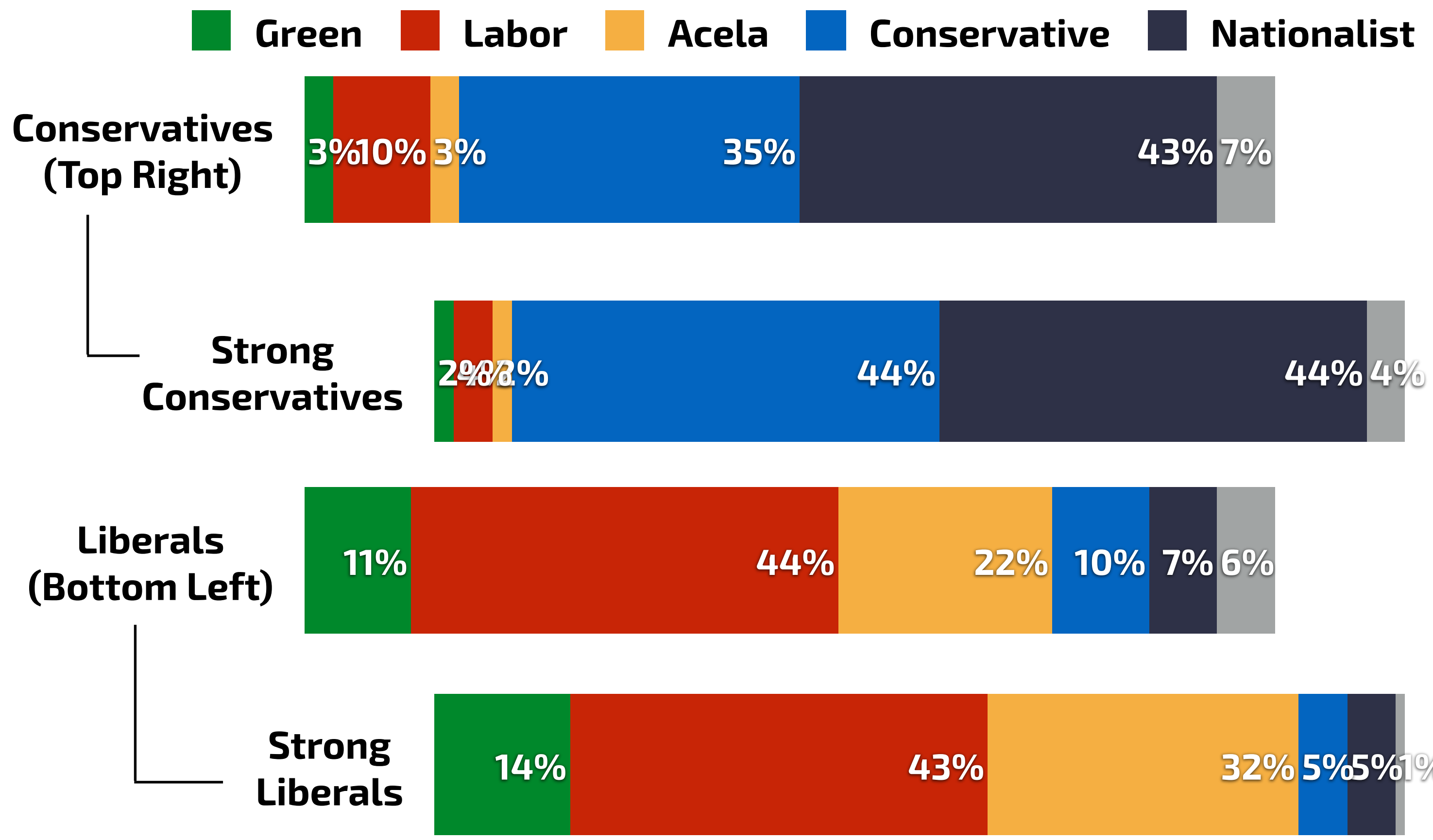
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Populists choose right-leaning parties over left-leaning parties by just a 3 point margin



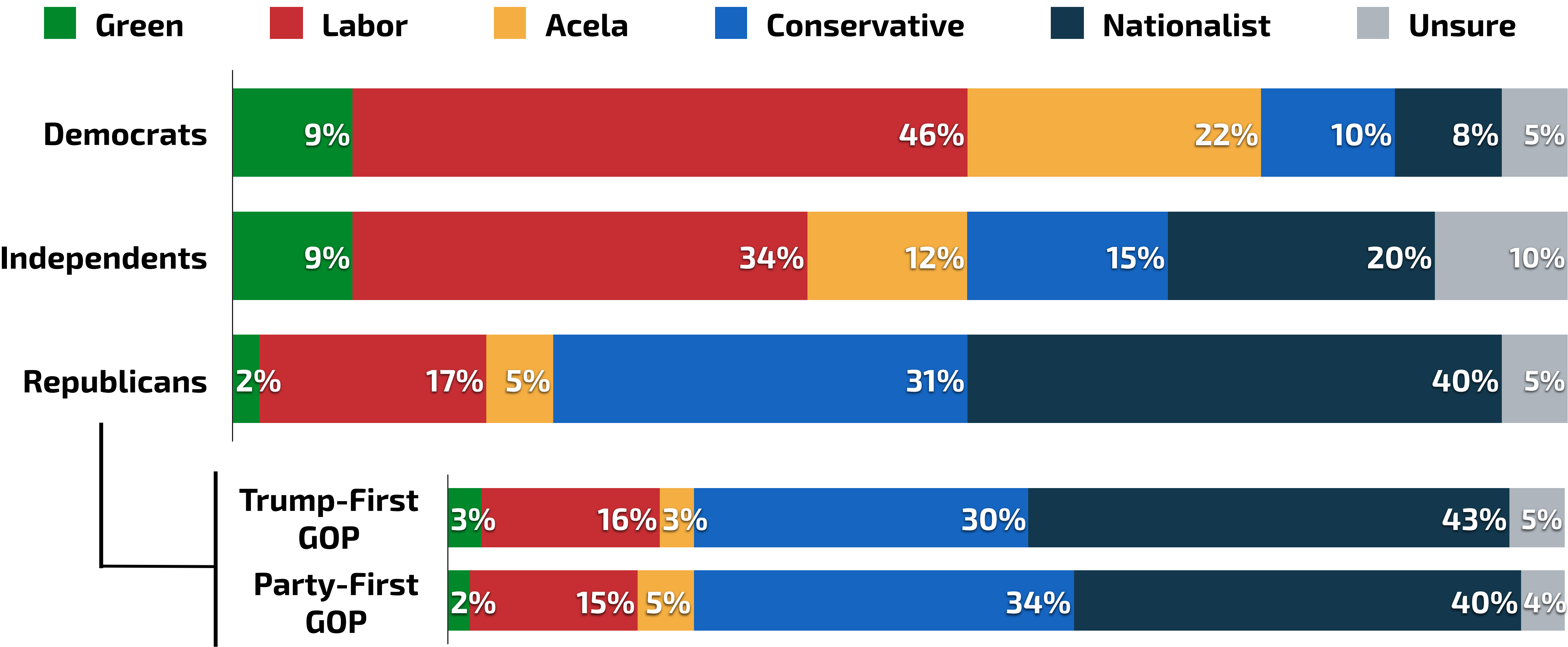
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Strong Conservatives support the Conservative Party and Nationalist Party equally



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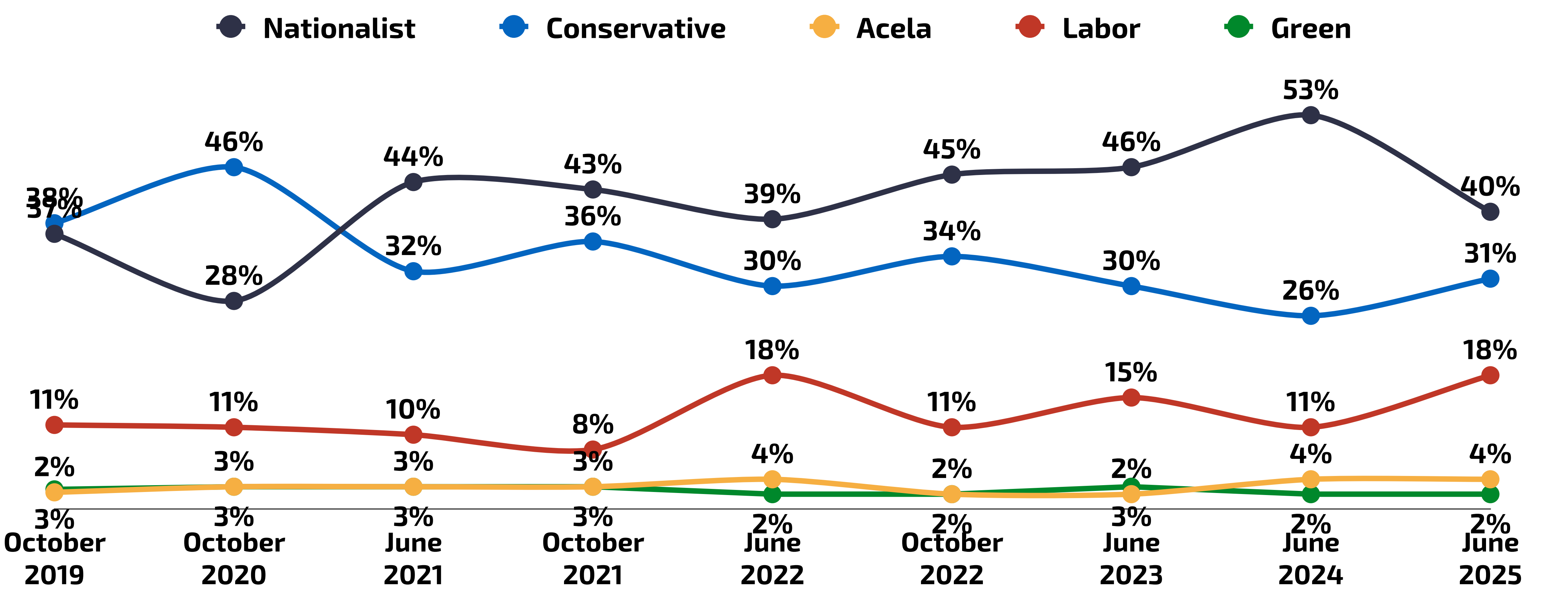
Nationalist Party wins among GOP, Labor with Democrats and Independents



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

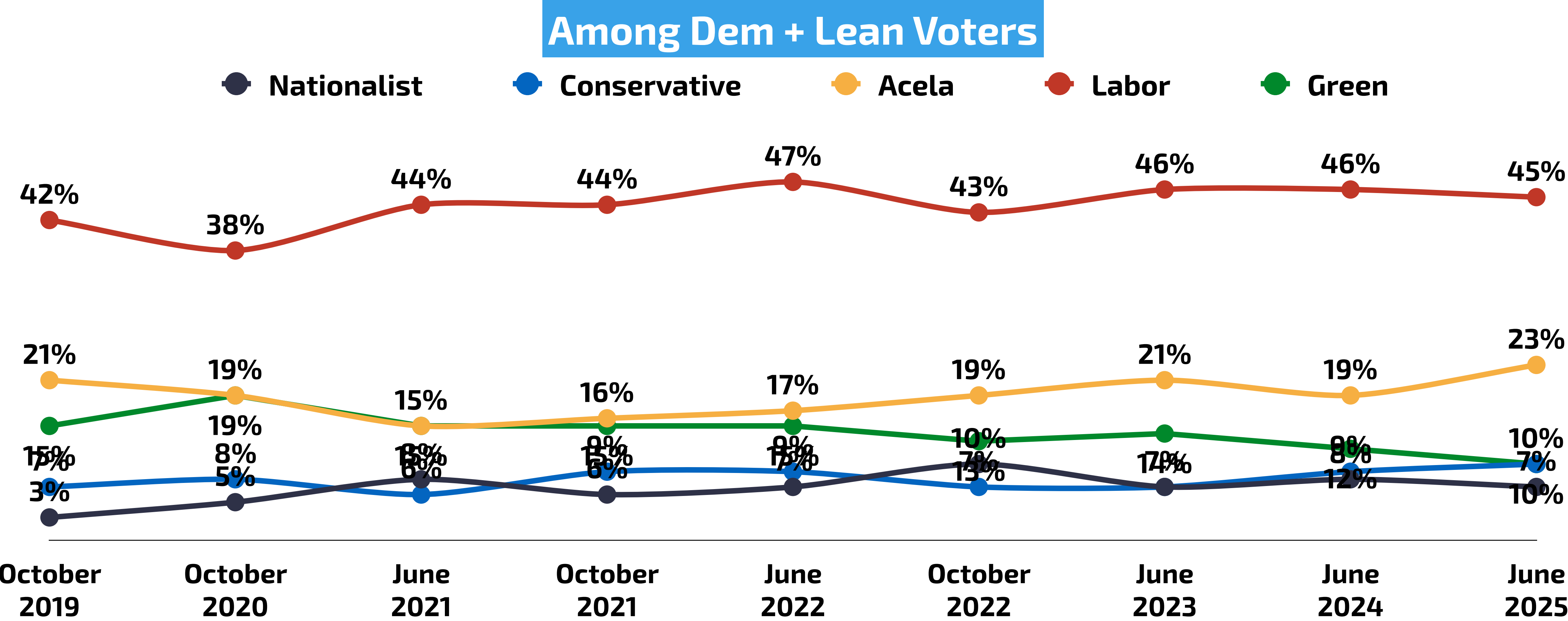
Nationalist support among GOP dips from record high

Among GOP + Lean Voters



Note: The October 2019, June 2021, and October 2021 surveys are weighted to Registered Voters, all others are weighted to Likely Electorate. Unsure not included.
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]

Labor support among Democrats remains high, support for Acela slightly increases



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