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.

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

Note: Unsure not shown
Voters were asked if they agreed more with the more liberal or more conservative stance on a variety of economic issues.

<table>
<thead>
<tr>
<th></th>
<th>Liberal</th>
<th>Conservative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard work and determination are no guarantee of success for most people</td>
<td>38%</td>
<td>57%</td>
</tr>
<tr>
<td>I would rather have a bigger government providing more services</td>
<td>41%</td>
<td>45%</td>
</tr>
<tr>
<td>The fact that some people in the U.S. are rich and others are poor is a problem that needs to be fixed</td>
<td>41%</td>
<td>51%</td>
</tr>
<tr>
<td>Government regulation of business is necessary to protect the public interest</td>
<td>48%</td>
<td>39%</td>
</tr>
<tr>
<td>The federal minimum wage must be increased to $15 an hour</td>
<td>49%</td>
<td>42%</td>
</tr>
<tr>
<td>Free trade agreements have generally hurt the United States</td>
<td>28%</td>
<td>42%</td>
</tr>
<tr>
<td>We should raise taxes in order to ensure Social Security and Medicare’s long-term future</td>
<td>49%</td>
<td>33%</td>
</tr>
<tr>
<td>It is the responsibility of the federal government to see to it that everyone has health care coverage</td>
<td>52%</td>
<td>39%</td>
</tr>
<tr>
<td>Stricter environmental laws and regulations are worth the cost</td>
<td>51%</td>
<td>37%</td>
</tr>
<tr>
<td>We should raise taxes on people making more than $200,000 a year</td>
<td>60%</td>
<td>30%</td>
</tr>
<tr>
<td>Note: Unsure not shown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Cultural Conservatives Outnumber Cultural Liberals 56-44, Economic Liberals Outnumber Economic Conservatives 52-48

<table>
<thead>
<tr>
<th></th>
<th>0-24</th>
<th>25-49</th>
<th>50-74</th>
<th>75-100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural</td>
<td>19%</td>
<td>26%</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>Economic</td>
<td>20%</td>
<td>32%</td>
<td>27%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Note: Scores under 50 are liberal, scores 50 and over are conservative
Culturally Conservative and Economically Liberal Voters Are 14% Of Electorate

- Populists: 14%
- Conservatives: 42%
- Liberals: 39%
- Libertarians: 6%
Strong Conservatives, Strong Liberals Hold Roughly Same Share Of Electorate As Populists

- Populists: 14%
- All Conservatives: 42%
- All Liberals: 39%
- Libertarians: 6%

Strong Conservatives: 16%
Strong Liberals: 13%
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

<table>
<thead>
<tr>
<th>Party Quadrant</th>
<th>Democrat + Lean</th>
<th>Independent</th>
<th>Republican + Lean</th>
<th>Unsure/Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservatives (Top Right)</td>
<td>13%</td>
<td>6%</td>
<td>76%</td>
<td>6%</td>
</tr>
<tr>
<td>Populists (Top Left)</td>
<td>42%</td>
<td>6%</td>
<td>49%</td>
<td>3%</td>
</tr>
<tr>
<td>Liberals (Bottom Left)</td>
<td>80%</td>
<td>4%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Libertarians (Bottom Right)</td>
<td>58%</td>
<td>16%</td>
<td>23%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Strong Liberals, Strong Conservatives Almost Entirely Polarized

Conservatives (Top Right)
- 13% Democrat + Lean
- 6% Independent
- 76% Republican + Lean
- 6% Unsure/Other

Strong Conservatives
- 5% Democrat + Lean
- 1% Independent
- 89% Republican + Lean
- 5% Unsure/Other

Liberals (Bottom Left)
- 80% Democrat + Lean
- 4% Independent
- 10% Republican + Lean
- 7% Unsure/Other

Strong Liberals
- 91% Democrat + Lean
- 1% Independent
- 19% Republican + Lean
- 2% Unsure/Other
Clinton won Populists in 2016, though her support was weaker among Liberals compared to Biden in 2020.
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

Conservatives (Top Right)
- Clinton: 14%
- Trump: 72%
- Johnson: 3%
- Other/Unsure: 3%
- Did not vote: 7%

Populists (Top Left)
- Clinton: 41%
- Trump: 34%
- Johnson: 3%
- Other/Unsure: 2%
- Did not vote: 18%

Liberals (Bottom Left)
- Clinton: 69%
- Trump: 11%
- Johnson: 29%
- Other/Unsure: 14%

Libertarians (Bottom Right)
- Clinton: 59%
- Trump: 18%
- Johnson: 45%
- Other/Unsure: 5%
- Did not vote: 13%

R+58
D+7
D+58
D+41
Trump Gained Among Populists; Biden Mobilized Liberals

Conservatives (Top Right)
- 19% Biden
- 76% Trump
- 11% Other/Unsure
- R+57

Populists (Top Left)
- 38% Biden
- 53% Trump
- 11% Other/Unsure
- R+15

Liberals (Bottom Left)
- 84% Biden
- 10% Trump
- 1% Other/Unsure
- D+74

Libertarians (Bottom Right)
- 69% Biden
- 15% Trump
- 4% Jorgensen
- 1% Other/Unsure
- D+54

(Images of scatter plots showing voter sentiment)
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

- **Conservatives (Top Right):** 7% Self-Identified Liberal, 21% Self-Identified Moderate, 71% Self-Identified Conservative, 2% Unsure
- **Populists (Top Left):** 19% Self-Identified Liberal, 38% Self-Identified Moderate, 33% Self-Identified Conservative, 10% Unsure
- **Liberals (Bottom Left):** 53% Self-Identified Liberal, 32% Self-Identified Moderate, 10% Self-Identified Conservative, 5% Unsure
- **Libertarians (Bottom Right):** 11% Self-Identified Liberal, 59% Self-Identified Moderate, 25% Self-Identified Conservative, 5% Unsure
1 in 5 Strong Liberals Identify As Ideologically Moderate

- **Conservatives (Top Right):**
  - 7% Self-Identified Liberal
  - 21% Self-Identified Moderate
  - 71% Self-Identified Conservative
  - 2% Unsure

- **Strong Conservatives:**
  - 19% Self-Identified Liberal
  - 93% Self-Identified Conservative

- **Liberals (Bottom Left):**
  - 53% Self-Identified Liberal
  - 32% Self-Identified Moderate
  - 10% Self-Identified Conservative
  - 5% Unsure

- **Strong Liberals:**
  - 76% Self-Identified Liberal
  - 19% Self-Identified Moderate
  - 5% Self-Identified Conservative

**Chart Colors:**
- Blue: Self-Identified Liberal
- Purple: Self-Identified Moderate
- Red: Self-Identified Conservative
- Gray: Unsure

**Legend:**
- Echelon Insights
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

- Conservatives (Top Right)
  - 11% 15% 14% 29% 30%

- Populists (Top Left)
  - 11% 17% 25% 26% 21%

- Liberals (Bottom Left)
  - 25% 16% 13% 26% 21%

- Libertarians (Bottom Right)
  - 11% 14% 23% 34% 18%
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.
<table>
<thead>
<tr>
<th>Group</th>
<th>White</th>
<th>Black</th>
<th>Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservatives</td>
<td>83%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Populists</td>
<td>65%</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Liberals</td>
<td>64%</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>Libertarians</td>
<td>61%</td>
<td>7%</td>
<td>18%</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>Conservatives</th>
<th>Populists</th>
<th>Liberals</th>
<th>Libertarians</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs and the economy (21%)</td>
<td>Jobs and the economy (26%)</td>
<td>The environment and climate change (13%)</td>
<td>The coronavirus pandemic (13%)</td>
</tr>
<tr>
<td>Immigration (17%)</td>
<td>Political corruption (11%)</td>
<td>Healthcare (13%)</td>
<td>Jobs and the economy (12%)</td>
</tr>
<tr>
<td>Political corruption (13%)</td>
<td>Healthcare (11%)</td>
<td>Race relations (12%)</td>
<td>Crime (10%)</td>
</tr>
</tbody>
</table>
## 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?

<table>
<thead>
<tr>
<th>Conservatives</th>
<th>Strong Conservatives</th>
<th>Liberals</th>
<th>Strong Liberals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs and the economy</td>
<td>Immigration (26%)</td>
<td>The environment and climate change (13%)</td>
<td>Race relations (24%)</td>
</tr>
<tr>
<td>Immigration (17%)</td>
<td>Jobs and the economy (21%)</td>
<td>Healthcare (13%)</td>
<td>The environment and climate change (16%)</td>
</tr>
<tr>
<td>Political corruption (13%)</td>
<td>Political corruption (17%)</td>
<td>Race relations (12%)</td>
<td>Healthcare (15%)</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>PARTY</th>
<th>LEADER</th>
<th>JUNE 2021</th>
<th>OCTOBER 2020</th>
<th>CHANGE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NATIONALIST</td>
<td>24%</td>
<td>16%</td>
<td>+8%</td>
<td></td>
<td>Stop illegal immigration, put America First, stand up to political correctness, and end unfair trade deals</td>
</tr>
<tr>
<td>CONSERVATIVE</td>
<td>19%</td>
<td>25%</td>
<td>-6%</td>
<td></td>
<td>Defend the American system of free enterprise, promote traditional family values, and ensure a strong military</td>
</tr>
<tr>
<td>ACELA</td>
<td>10%</td>
<td>11%</td>
<td>-1%</td>
<td></td>
<td>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</td>
</tr>
<tr>
<td>LABOR</td>
<td>26%</td>
<td>26%</td>
<td>0%</td>
<td></td>
<td>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</td>
</tr>
<tr>
<td>GREEN</td>
<td>9%</td>
<td>11%</td>
<td>-2%</td>
<td></td>
<td>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</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>PARTY</th>
<th>LEADER</th>
<th>JUNE 2021</th>
<th>OCTOBER 2020</th>
<th>CHANGE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NATIONALIST</td>
<td>[Image]</td>
<td>24%</td>
<td>16%</td>
<td>+8%</td>
<td>The Trump Republican Party: Anti-Illegal immigration &amp; political correctness, assert American national identity</td>
</tr>
<tr>
<td>CONSERVATIVE</td>
<td>[Image]</td>
<td>19%</td>
<td>25%</td>
<td>-6%</td>
<td>The Pre-Trump Republican Party: Pro-Free Enterprise, socially conservative, strong on defense</td>
</tr>
<tr>
<td>ACела</td>
<td>[Image]</td>
<td>10%</td>
<td>11%</td>
<td>-1%</td>
<td>The Acela Corridor’s idea of centristm: Socially liberal, globalist, fiscally responsible</td>
</tr>
<tr>
<td>LABOR</td>
<td>[Image]</td>
<td>26%</td>
<td>26%</td>
<td>0%</td>
<td>A “hard-hat” version of today’s Democratic Party, focused on bread-and-butter economic issues, not cultural issues.</td>
</tr>
<tr>
<td>GREEN</td>
<td>[Image]</td>
<td>9%</td>
<td>11%</td>
<td>-2%</td>
<td>The political home of the Squad, pushing for a Green New Deal and socialist policies</td>
</tr>
</tbody>
</table>

Note: October 2020 survey was of the Likely Electorate, June 2021 was of Registered Voters
Conservative, Acela Parties Have Most Crossover Appeal

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

- **Donald Trump**
  - Nationalist: 83%
  - Conservative: 78%
  - Acela: 19%
  - Labor: 15%
  - Green: 15%

- **Joe Biden**
  - Nationalist: 3%
  - Conservative: 2%
  - Acela: 80%
  - Labor: 84%
  - Green: 85%

- **Other/Unsure**
  - Nationalist: 14%
  - Conservative: 20%
  - Acela: 80%
  - Labor: 84%
  - Green: 85%

- **Party Affiliation**
  - Republican: R+69
  - Democratic: D+70
  - Other/Unsure: 2%

- **Candidate**
  - Donald Trump: 85%
  - Other/Unsure: 2%
  - Joe Biden: 83%
  - Other/Unsure: 2%

- **Crossover Appeal**
  - Republican: 83%
  - Democratic: 15%
  - Other/Unsure: 2%
  - Donald Trump: 85%
  - Joe Biden: 83%

*Echelon Insights*
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

Conservatives (Top Right)
- Green: 4%
- Acela: 8%
- Labor: 3%
- Conservative: 33%
- Nationalist: 42%
- Unsure: 9%

Populists (Top Left)
- Green: 9%
- Acela: 26%
- Labor: 9%
- Conservative: 16%
- Nationalist: 18%
- Unsure: 22%

Liberals (Bottom Left)
- Green: 15%
- Acela: 42%
- Labor: 19%
- Conservative: 4%
- Nationalist: 8%
- Unsure: 11%

Libertarians (Bottom Right)
- Green: 7%
- Acela: 41%
- Labor: 9%
- Conservative: 12%
- Nationalist: 13%
- Unsure: 18%
Strong Liberals Drive Green Party Support

Conservatives (Top Right)

- Green: 4%
- Acela: 8%
- Labor: 3%
- Conservative: 33%
- Nationalist: 42%
- Unsure: 9%

Liberals (Bottom Left)

- Green: 15%
- Acela: 42%
- Labor: 19%
- Conservative: 4%
- Nationalist: 8%
- Unsure: 11%

Strong Liberals

- Green: 27%
- Acela: 42%
- Labor: 21%
- Conservative: 6%
- Nationalist: 2%
- Unsure: 2%
Nationalist Party Wins Among GOP, Labor With Democrats

**GOP+ (GOP-Leaning)**
- 3%
- 10%
- 3%
- 32%
- 44%
- 8%

**Independents**
- 8%
- 24%
- 11%
- 19%
- 19%
- 19%

**DEM+ (DEM-Leaning)**
- 15%
- 45%
- 16%
- 6%
- 8%
- 11%

**Colors and Labels**
- Green: Green
- Red: Labor
- Orange: Acela
- Blue: Conservative
- Dark Blue: Nationalist
- Gray: Unsure
Nationalist Support Among GOP Reaches New High

Republican and Republican-leaning Independents

<table>
<thead>
<tr>
<th></th>
<th>October 2019</th>
<th>October 2020</th>
<th>June 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Labor</td>
<td>11%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Acela</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Conservative</td>
<td>38%</td>
<td>46%</td>
<td>32%</td>
</tr>
<tr>
<td>Nationalist</td>
<td>37%</td>
<td>28%</td>
<td>44%</td>
</tr>
<tr>
<td>Unsure</td>
<td>8%</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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

Very Conservative
- Green: 2%
- Labor: 8%
- Acela: 1%
- Conservative: 35%
- Nationalist: 46%
- Unsure: 8%

Somewhat Conservative
- Green: 5%
- Labor: 12%
- Acela: 2%
- Conservative: 33%
- Nationalist: 39%
- Unsure: 9%

Moderate
- Green: 6%
- Labor: 34%
- Acela: 12%
- Conservative: 14%
- Nationalist: 17%
- Unsure: 16%

Somewhat Liberal
- Green: 19%
- Labor: 50%
- Acela: 18%
- Conservative: 2%
- Nationalist: 2%
- Unsure: 7%

Very Liberal
- Green: 24%
- Labor: 32%
- Acela: 25%
- Conservative: 4%
- Nationalist: 7%
- Unsure: 7%
**Center-Right Parties Would Combine For 25% Of Hispanic Vote, 16% Of Black Vote**

<table>
<thead>
<tr>
<th></th>
<th>White Non-College</th>
<th>White College</th>
<th>Black</th>
<th>Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Green</strong></td>
<td>6%</td>
<td>10%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Labor</strong></td>
<td>22%</td>
<td>26%</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td><strong>Acela</strong></td>
<td>6%</td>
<td>11%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Conservative</strong></td>
<td>24%</td>
<td>22%</td>
<td>6%</td>
<td>11%</td>
</tr>
<tr>
<td><strong>Nationalist</strong></td>
<td>33%</td>
<td>22%</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Unsure</strong></td>
<td>9%</td>
<td>9%</td>
<td>21%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Only 20% Of Gen Z Would Support A Center-Right Party

Gen X More Divided Between The Left And Right

<table>
<thead>
<tr>
<th>Generation</th>
<th>Green</th>
<th>Labor</th>
<th>Acela</th>
<th>Conservative</th>
<th>Nationalist</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td>19%</td>
<td>31%</td>
<td>23%</td>
<td>5%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>Millennials</td>
<td>14%</td>
<td>30%</td>
<td>14%</td>
<td>16%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Gen X</td>
<td>7%</td>
<td>29%</td>
<td>11%</td>
<td>18%</td>
<td>23%</td>
<td>13%</td>
</tr>
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<td>Boomers</td>
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<td>Silent+</td>
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</table>
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.