



Pulse of the Nation Report

Voter Attitudes and Concerns Driven by High Costs

About Future Majority



Future Majority was founded in 2017 to fill the critical need for an outside, non-biased, data-driven strategy center focused on reclaiming freedom and making the American worker the hero of our story. The Future Majority team has studied more 27 million data points from more than 196,000 unique voters, including more than 62,000 Democrats, 65,000 Independents, and 66,000 Republicans. **Our team has created one of the most comprehensive data sets on how American voters feel about issues, their leaders, and their own lives.** This report includes analysis and data on:

- **Costs are the driver of the issues landscape.** Voters overwhelmingly are dissatisfied with how they see America's economy working. More than three quarters say their incomes are falling behind the cost of living, more than 70% are worried about affording groceries this winter, and nearly 80% of voters of voters in the three states say they are concerned about an unexpected \$1,000 cost. While efforts to ease inflation are showing signs of success, voters are not yet feeling these impacts.
- **Financial Freedom moves Independents.** This new survey data and previous research show voters are more interested in an agenda that works toward "Financial" or "Economic Freedom" rather than namesake policy agendas. Democrats trail Republicans on which group voters trust to improve their financial freedom. Bidenomics is a policy blueprint, and the Freedom Frame is a way to advocate for it based on shared values. Voters are skeptical of broad claims of economic success when it does not match their lived experiences. A reignited labor movement is just one manifestation of this chronic financial frustration. Voters want more action to give them a fair shot to succeed in America.
- **Voters are still displeased with Republican extremism.** Even in more conservative states, the MAGA agenda is seen as extreme. More than half of voters in each state reject the recent conservative Court ruling banning the abortion pill mifepristone. In most cases, Independents are more likely to see Republicans as more extreme than Democrats.

Unless otherwise specified, the data presented in this report is from a September 16-19, 2023 survey of voters in Montana (n=1451), Ohio (n=1559), and Virginia (n=1437).

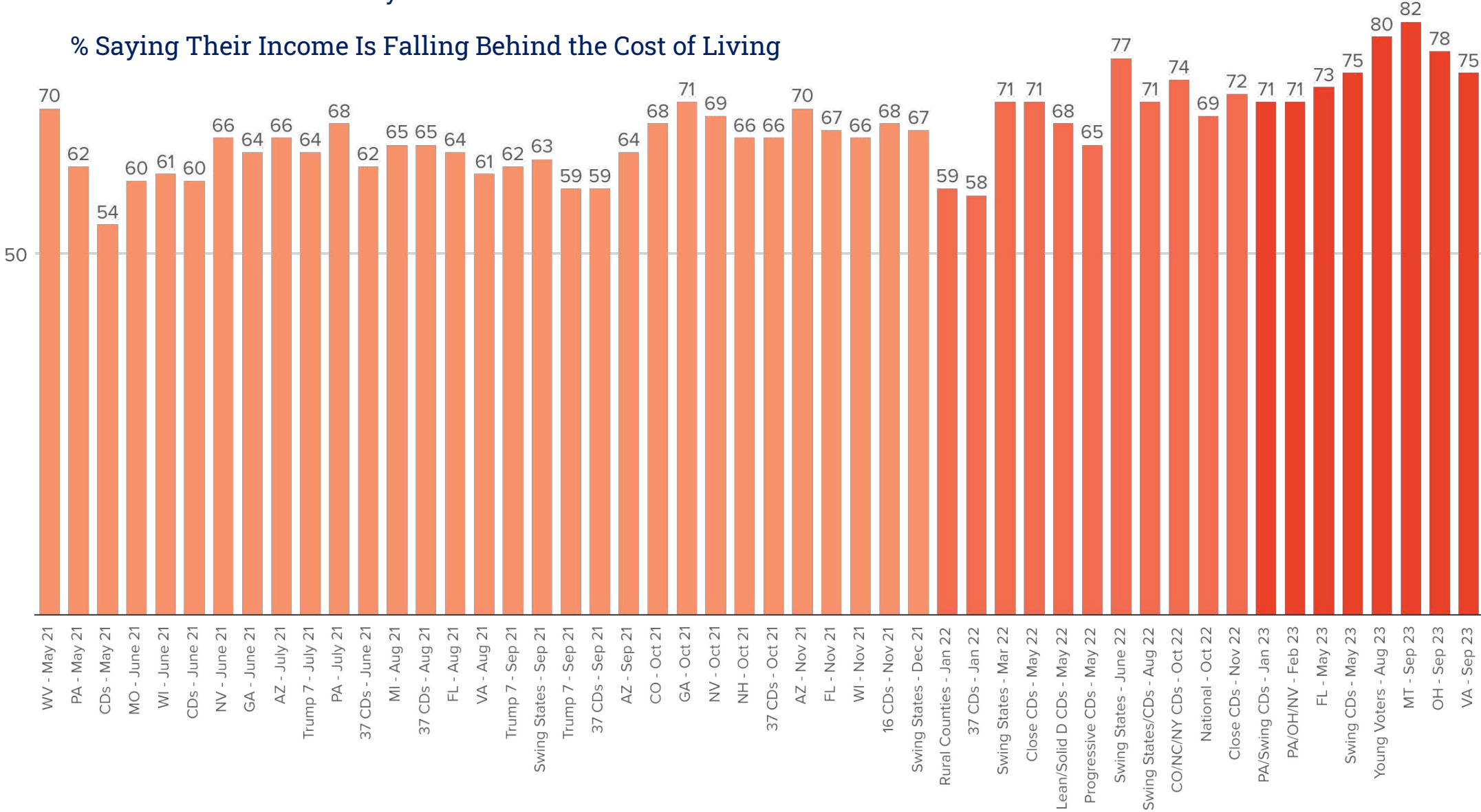
Issues Landscape

On nearly every measure, voters in these three states feel underwater with their personal finances and are looking for solutions to these challenges

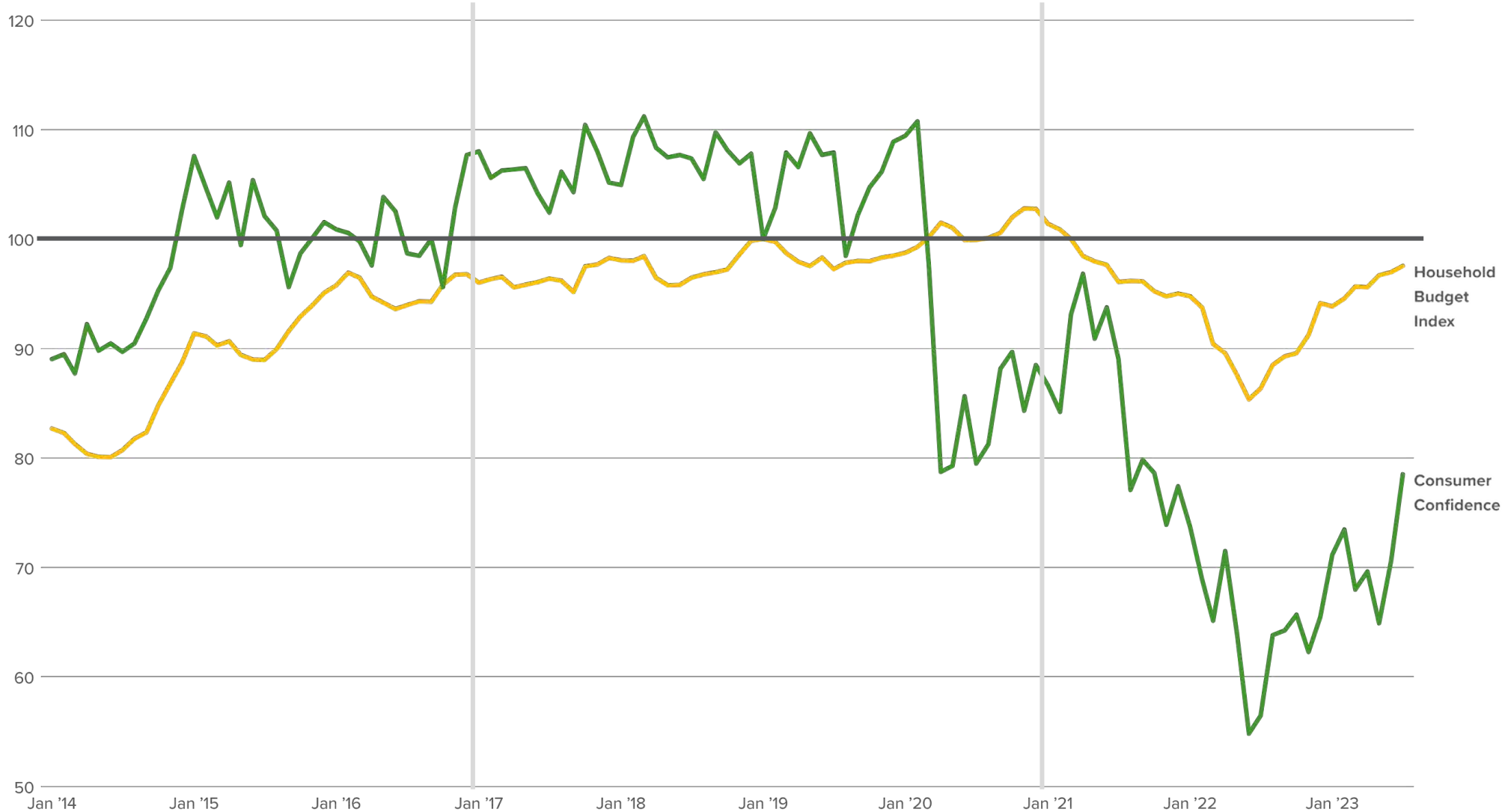
This Chart Defines the Last Three Years

The share of voters saying their income has been falling behind the cost of living has consistently risen during the last three years in states and congressional districts across the country

% Saying Their Income Is Falling Behind the Cost of Living



Key Economic Indicators Since 2014



The Household Budget Index measures purchasing power of middle income Americans. It focuses on energy, food, health care, and utilities. This started to decline in January 2021, not at the beginning of COVID.

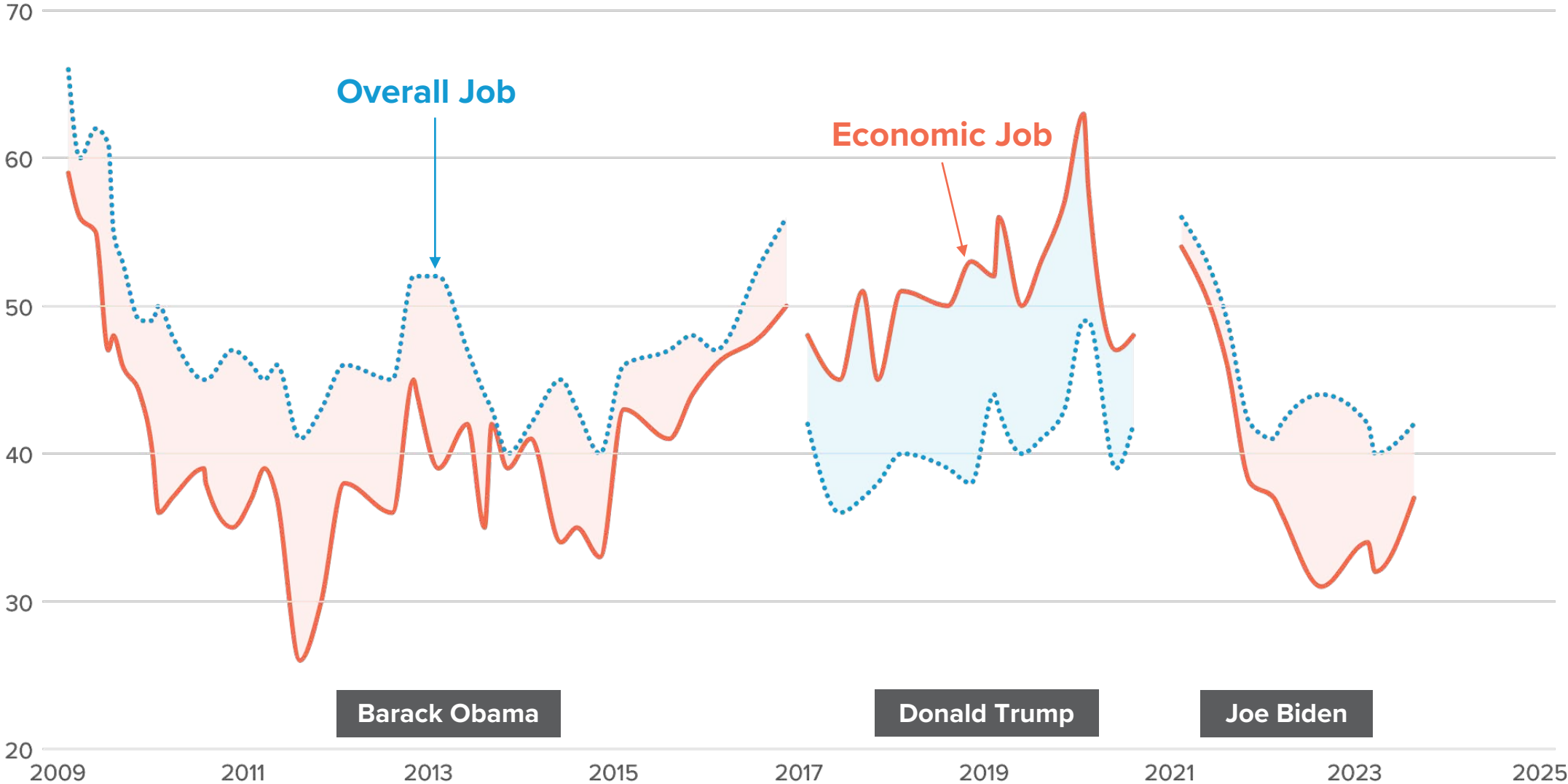
The Consumer Confidence Index is from the University of Michigan and has been a leading measure of consumer sentiment for decades.

Both measures are normalized to January 2019 and both lag behind that level now.

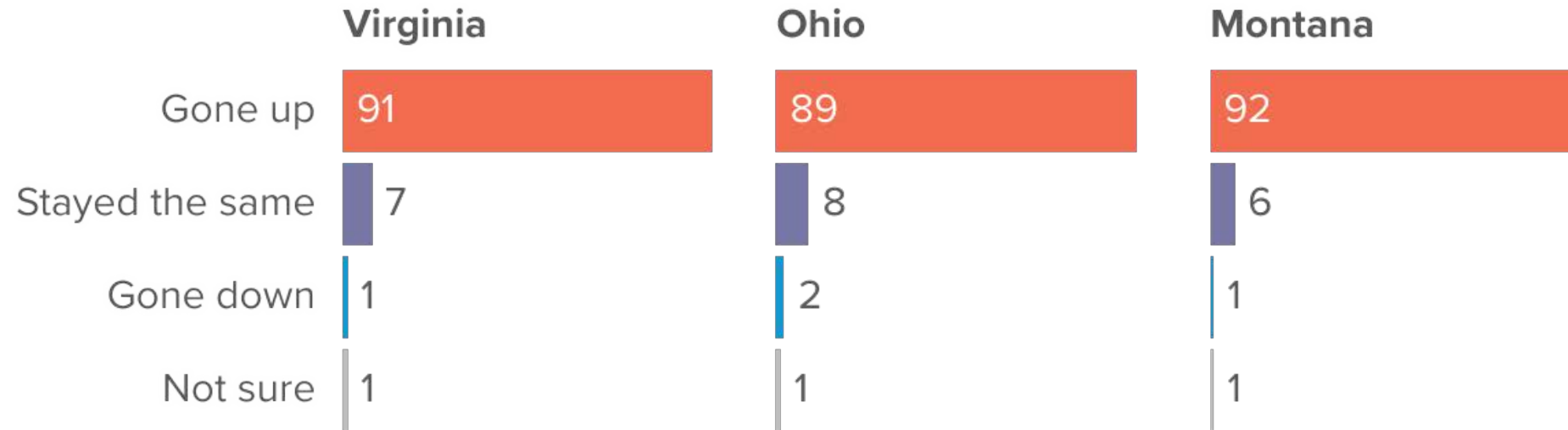
Confidence ran ahead of purchasing power during Trump's presidency and behind it during Biden's presidency so far.

Comparison of Overall Job Rating and Economic Rating for Recent Presidents

Voters consistently rated Obama worse on the economy than they did overall. The opposite happened under Trump. Biden has continued Obama's lagging trend throughout his term so far.

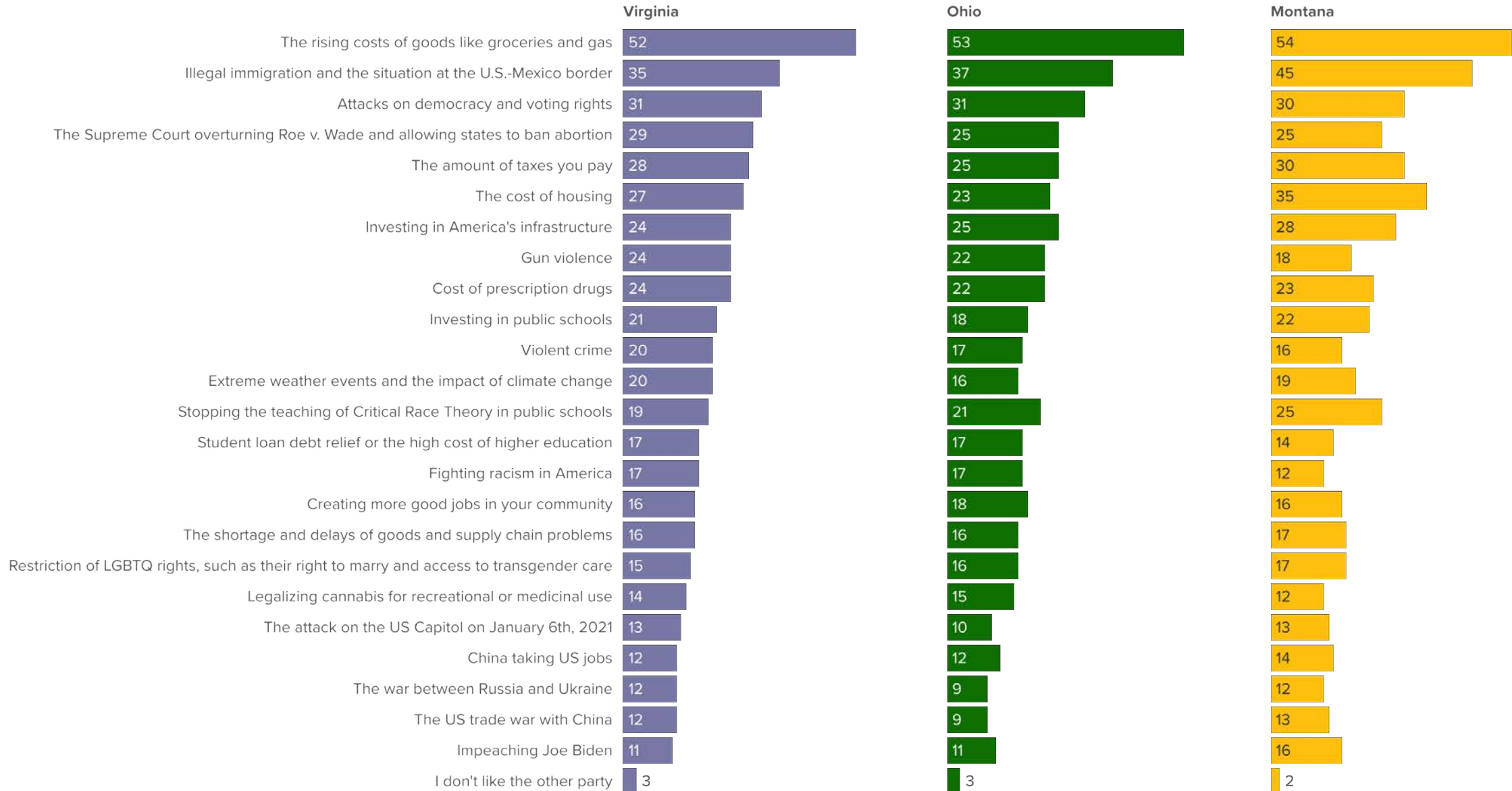


Costs of Things You Normally Buy Since the Start of 2023



Most Important Issue for Congress

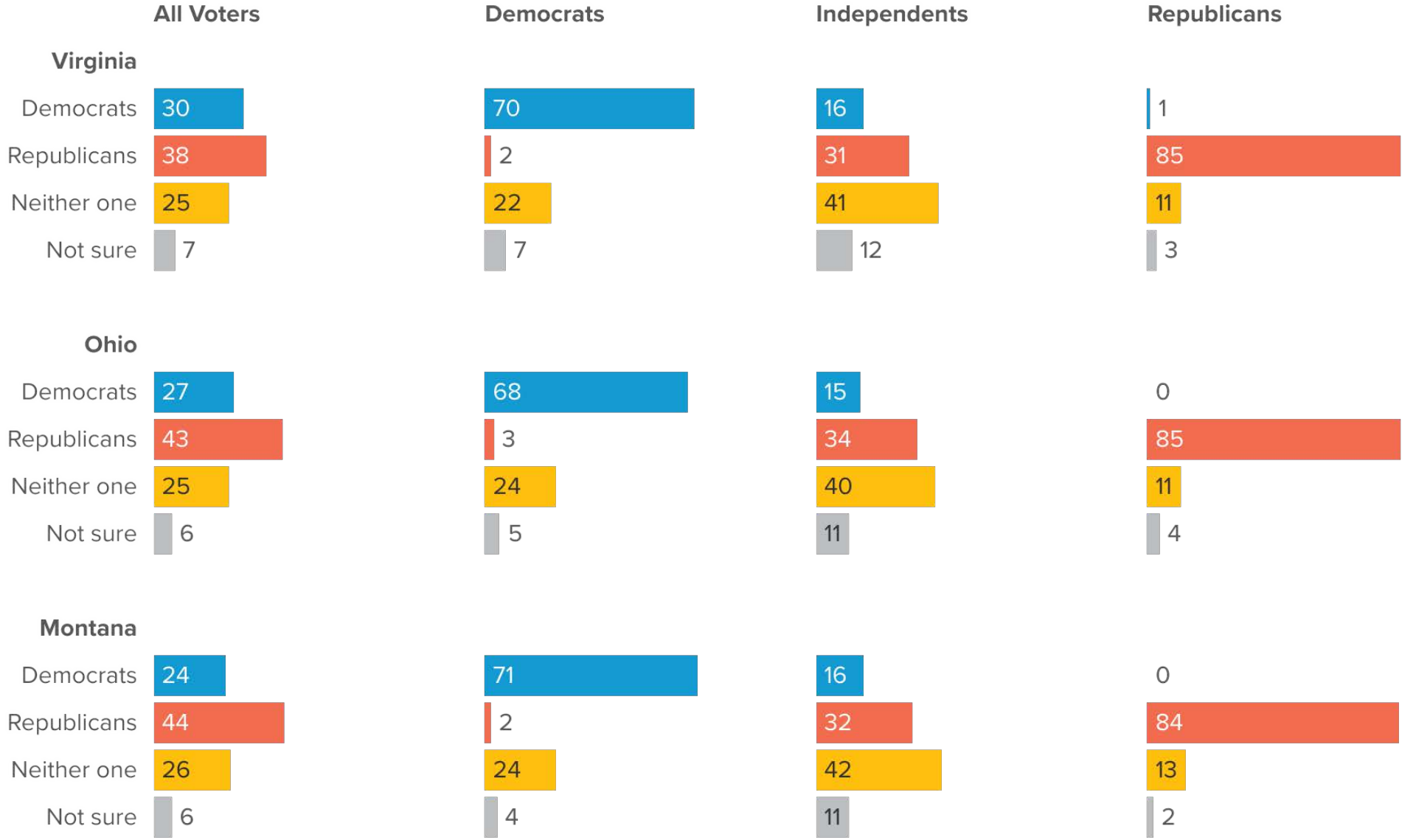
Rising costs persist as the most important issue that voters want Congress to address



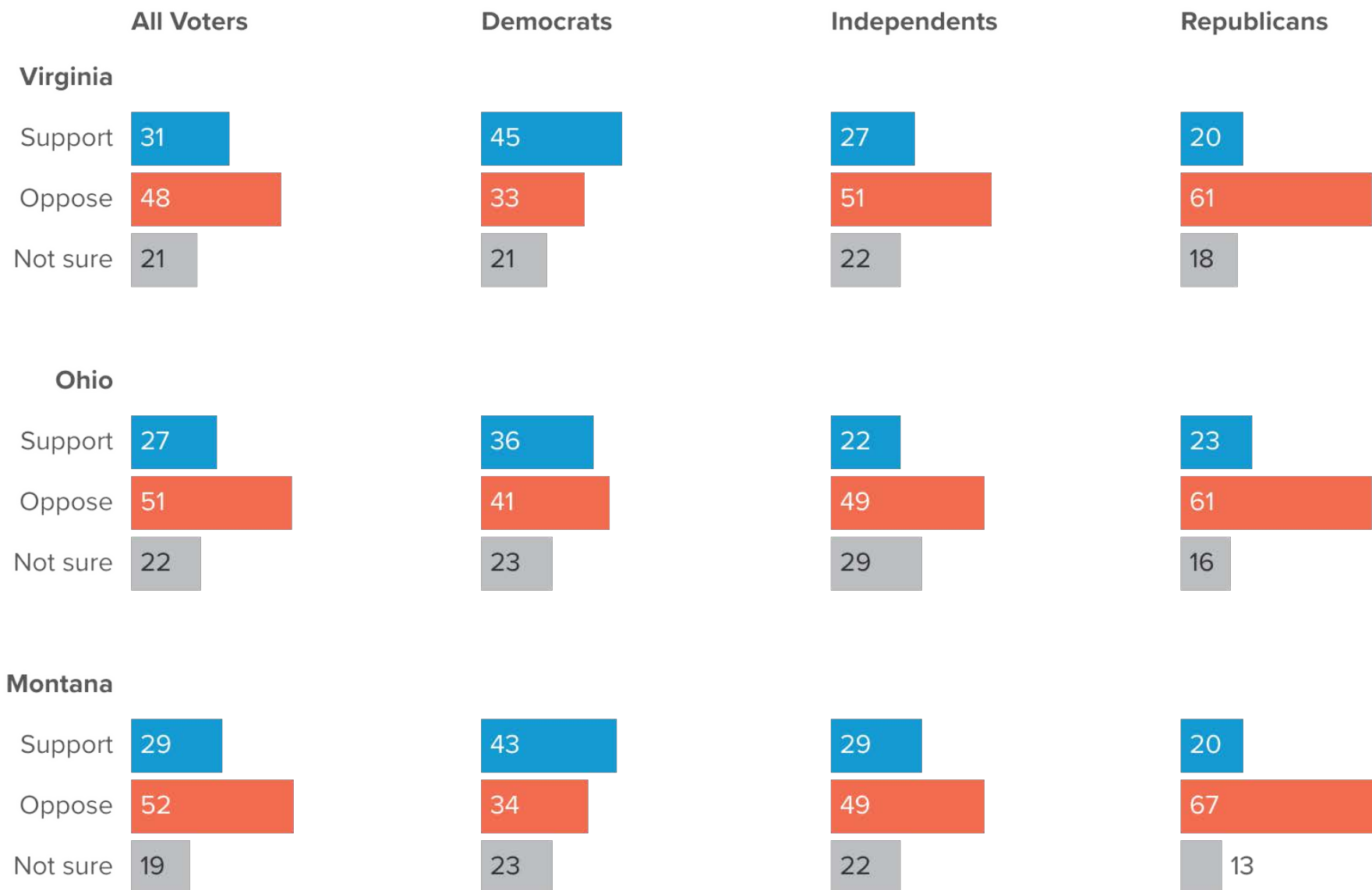
Most Important Issue for Congress

	Virginia				Ohio				Montana			
	All	Dem	Ind	GOP	All	Dem	Ind	GOP	All	Dem	Ind	GOP
The rising costs of goods like groceries and gas	52	33	54	71	53	33	55	69	54	31	54	69
Illegal immigration and the situation at the U.S.-Mexico border	35	6	32	69	37	4	34	68	45	5	42	75
Attacks on democracy and voting rights	31	46	29	16	31	54	29	14	30	48	26	21
The Supreme Court overturning Roe v. Wade and allowing states to ban abortion	29	46	30	9	25	44	24	9	25	51	25	9
The amount of taxes you pay	28	10	33	42	25	9	29	36	30	9	33	42
The cost of housing	27	28	31	22	23	24	31	16	35	38	38	30
Investing in America's infrastructure	24	26	23	24	25	27	28	20	28	33	29	23
Gun violence	24	43	22	4	22	45	19	4	18	42	17	2
Cost of prescription drugs	24	21	28	22	22	21	28	19	23	23	24	21
Investing in public schools	21	23	25	15	18	25	19	10	22	31	24	14
Violent crime	20	13	20	29	17	12	19	19	16	8	16	21
Extreme weather events and the impact of climate change	20	37	19	3	16	32	16	2	19	43	21	2
Stopping the teaching of Critical Race Theory in public schools	19	4	17	38	21	3	19	37	25	4	19	42
Student loan debt relief or the high cost of higher education	17	27	18	6	17	29	16	6	14	21	17	6
Fighting racism in America	17	30	14	6	17	34	16	4	12	27	11	4
Creating more good jobs in your community	16	14	17	19	18	17	22	17	16	15	16	18
The shortage and delays of goods and supply chain problems	16	8	17	23	16	7	19	22	17	6	19	23
Restriction of LGBTQ rights, such as their right to marry and access to transgender care	15	25	13	8	16	25	15	8	17	32	13	10
Legalizing cannabis for recreational or medicinal use	14	15	17	9	15	17	18	9	12	15	15	7
The attack on the US Capitol on January 6th, 2021	13	22	11	3	10	20	10	2	13	30	12	2
China taking US jobs	12	3	13	21	12	3	12	19	14	3	12	23
The war between Russia and Ukraine	12	12	10	13	9	7	12	9	12	14	11	11
The US trade war with China	12	3	12	21	9	2	11	14	13	5	12	19
Impeaching Joe Biden	11	0	7	28	11	1	10	20	16	1	12	29
I don't like the other party	3	4	2	3	3	6	2	2	2	2	2	1

Which Group Will Make You Safe and Financially Secure?

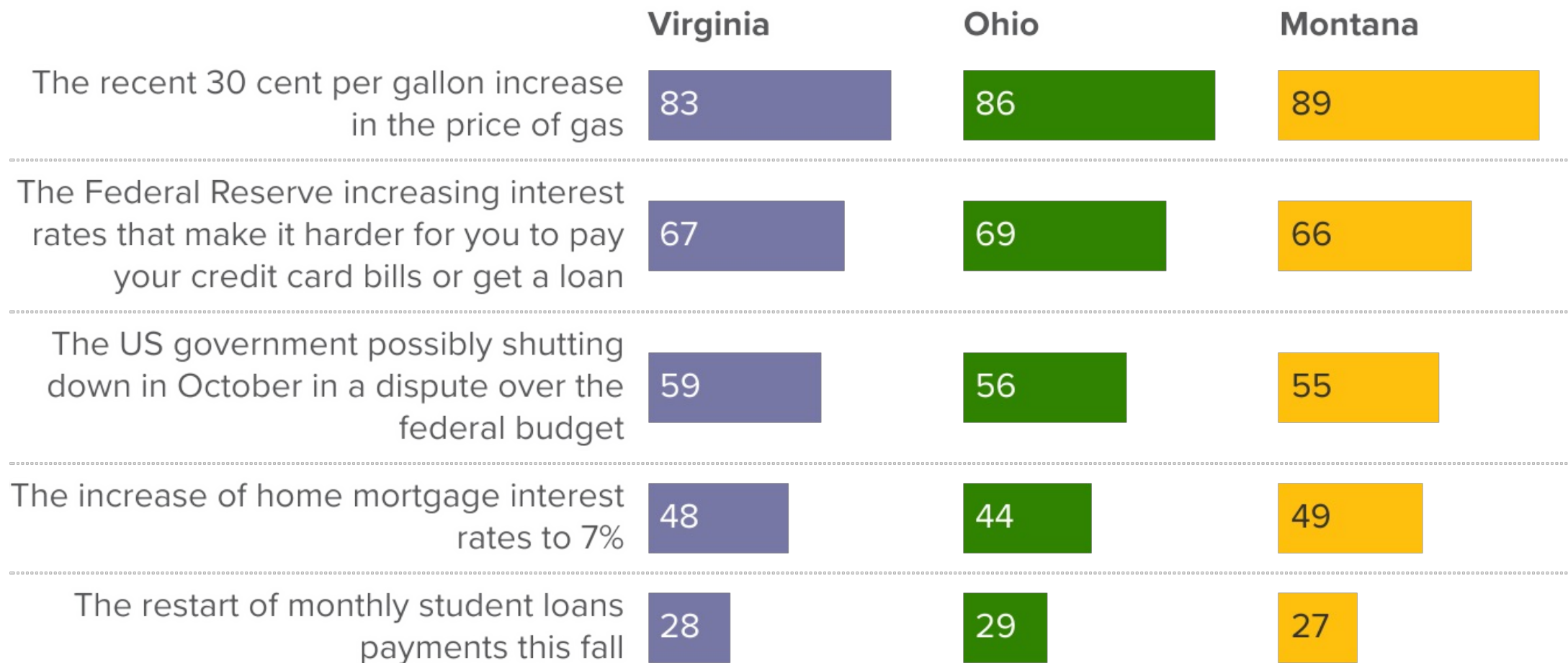


Do You Support or Oppose the Fed Increasing Interest Rates to Lower Inflation?



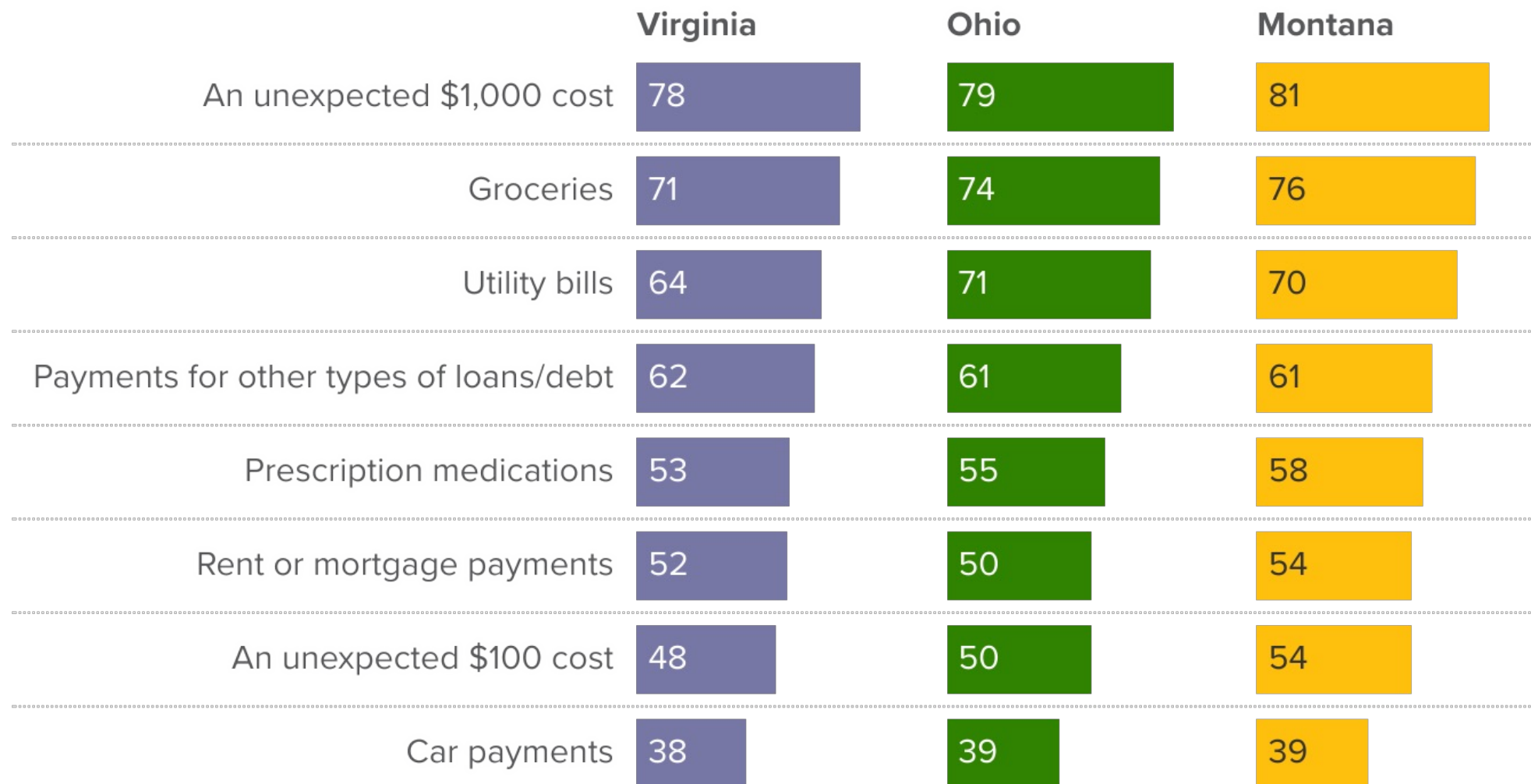
How Much Do You Think the Following Will Impact You?

% Impact "A Lot" + "Some"



Concern about Being Able to Afford This Fall and Winter

% Concerned

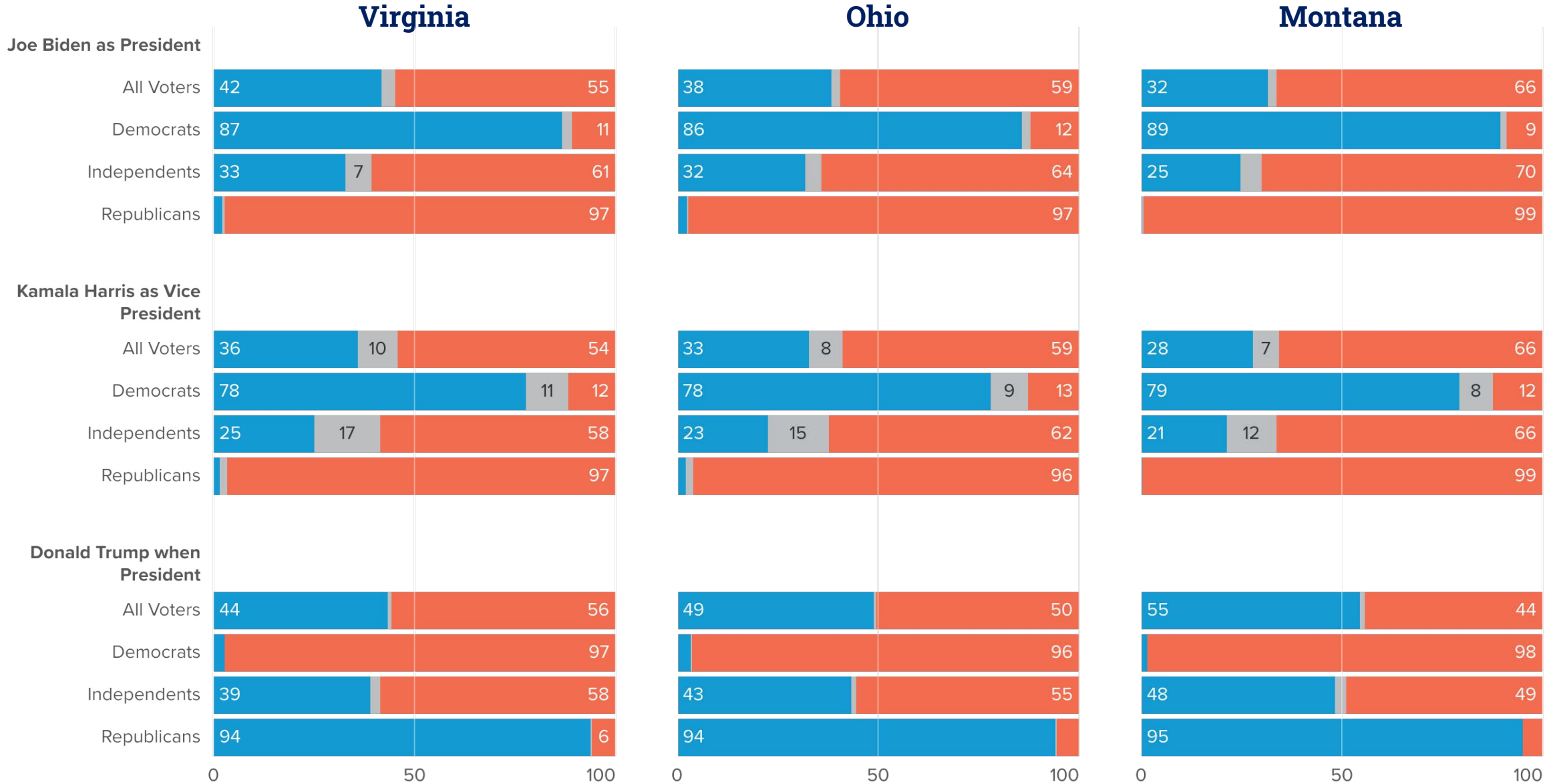


Job Approval of Public Figures

Voters are generally displeased with all the dominant public figures in American government and divided on who they prefer for next leaders

Job Approval Ratings

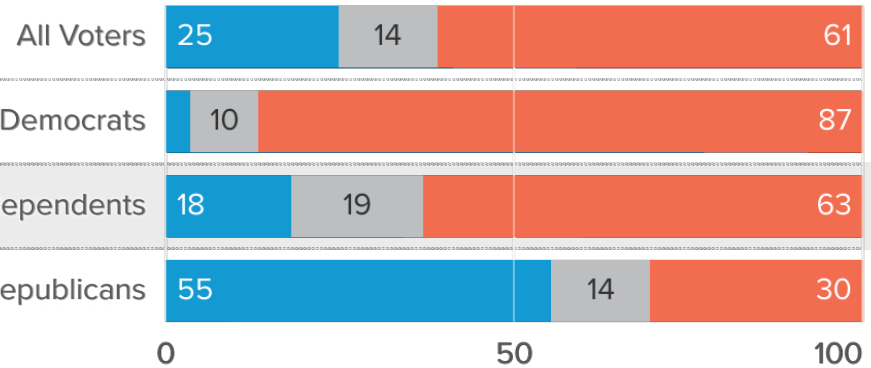
● Approve ● Not sure ● Disapprove



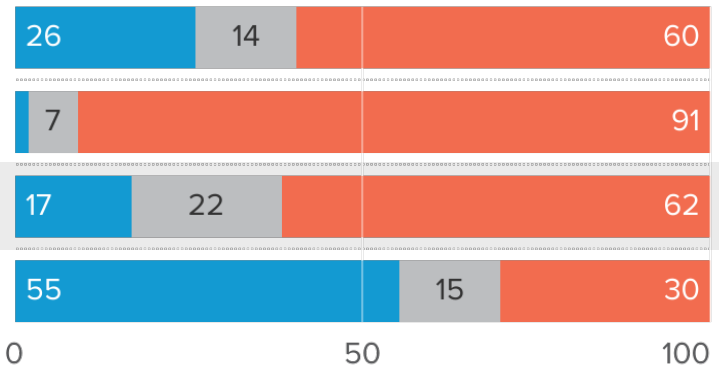
McCarthy/House GOP Job in Improving Your Life

● Approve ● Not sure ● Disapprove

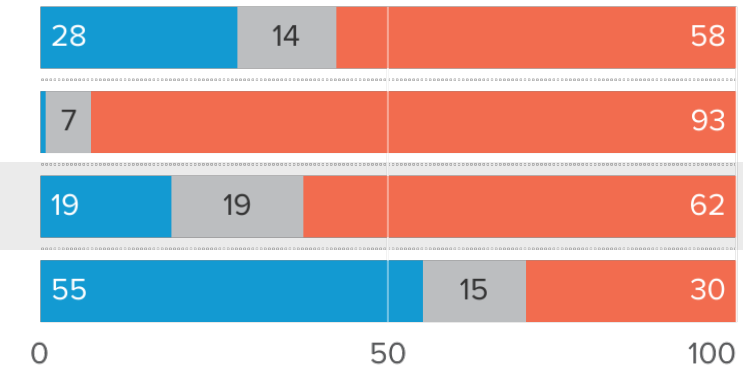
Virginia



Ohio



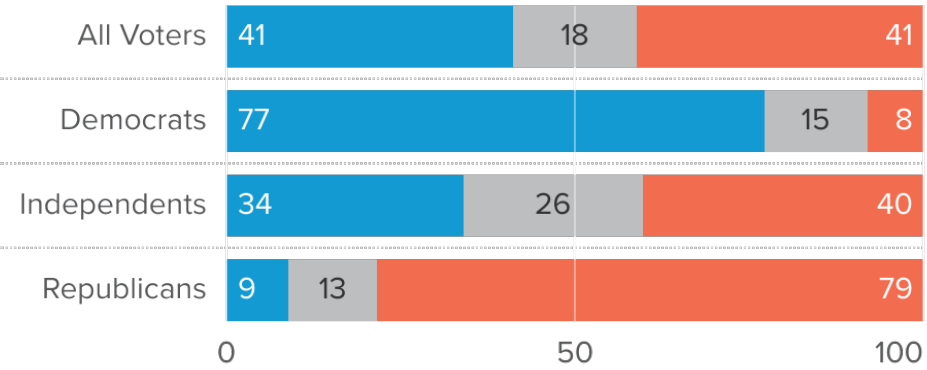
Montana



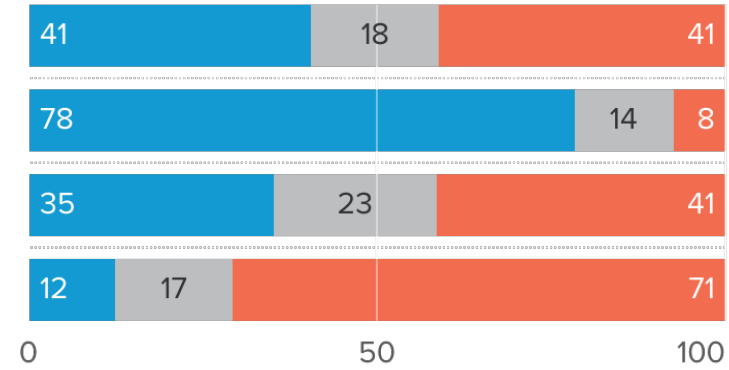
US Senate Job Approval

● Approve ● Not sure ● Disapprove

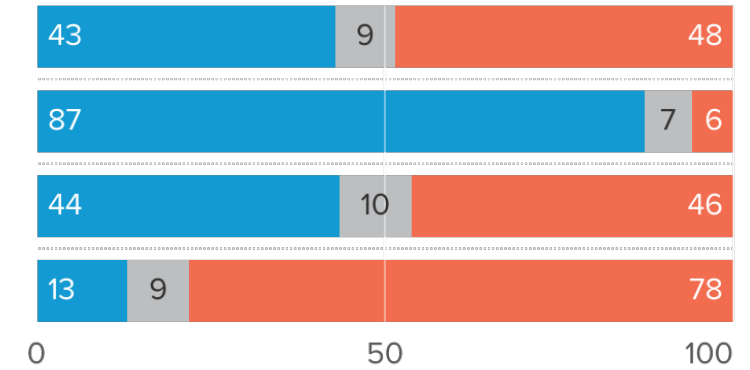
Virginia – Tim Kaine



Ohio – Sherrod Brown

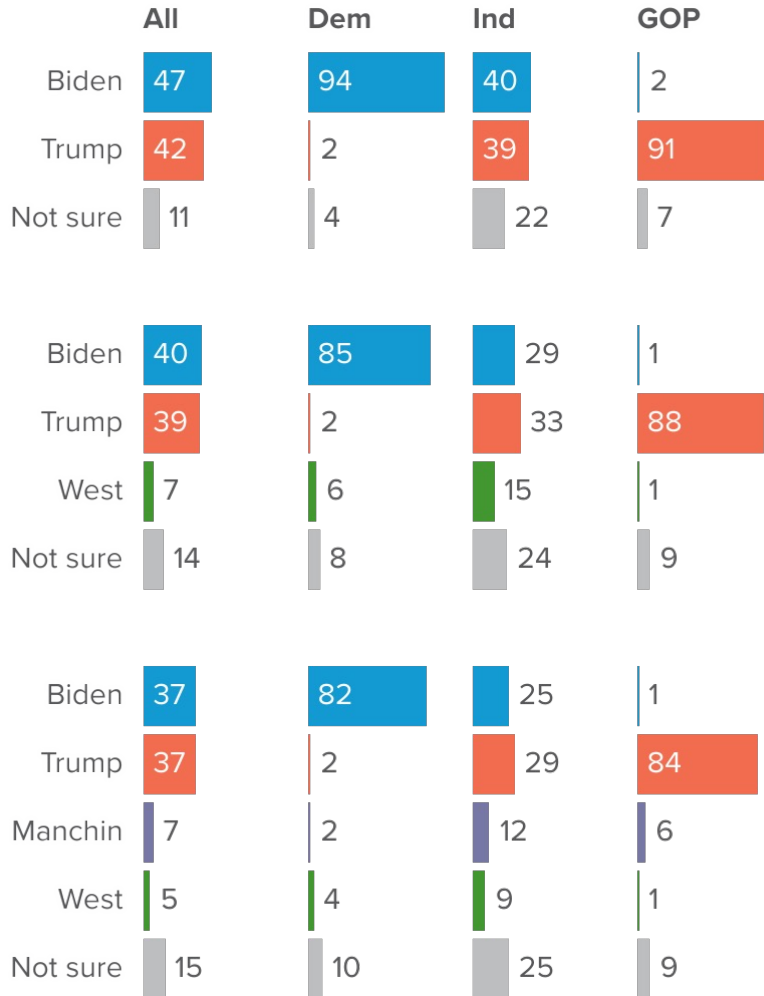


Montana – Jon Tester

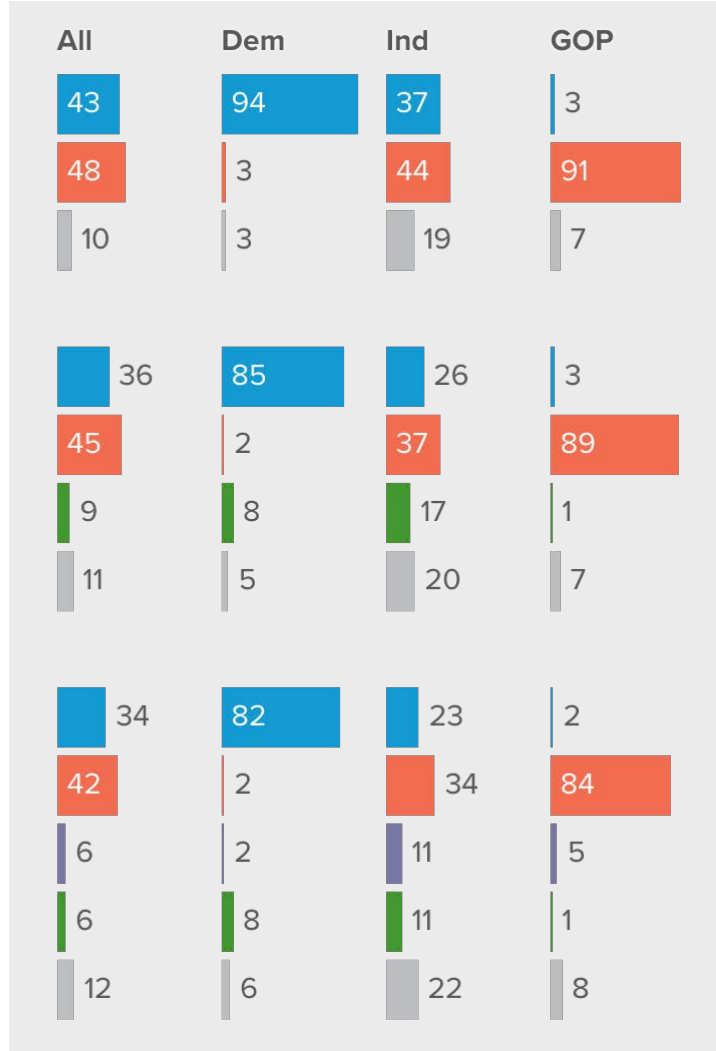


Current Presidential Vote Preference

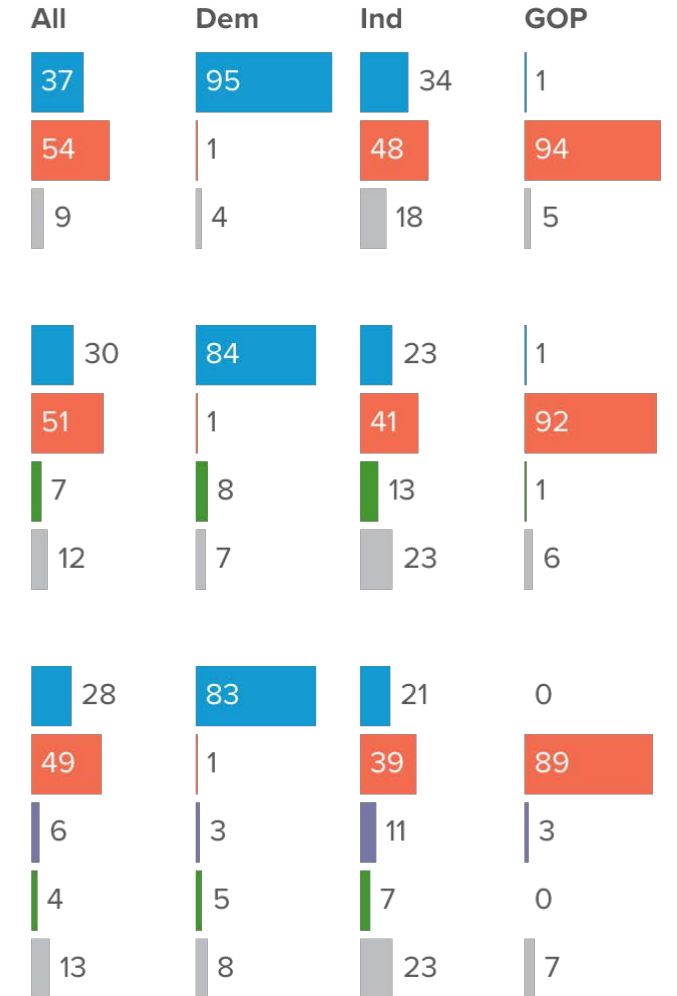
Virginia



Ohio

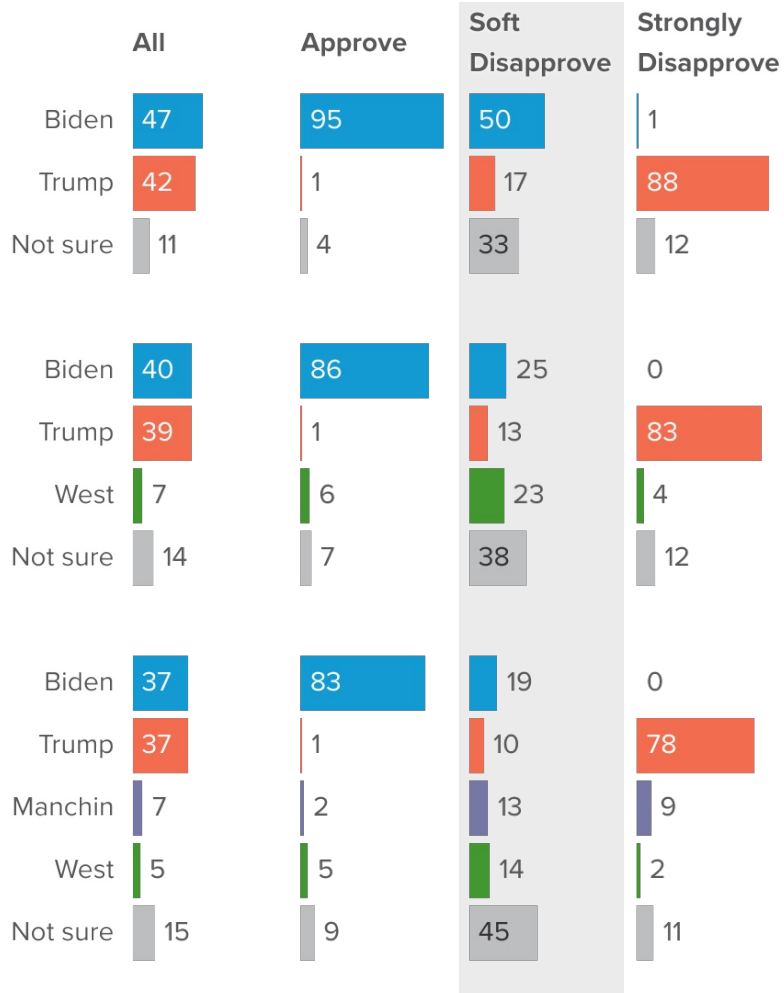


Montana

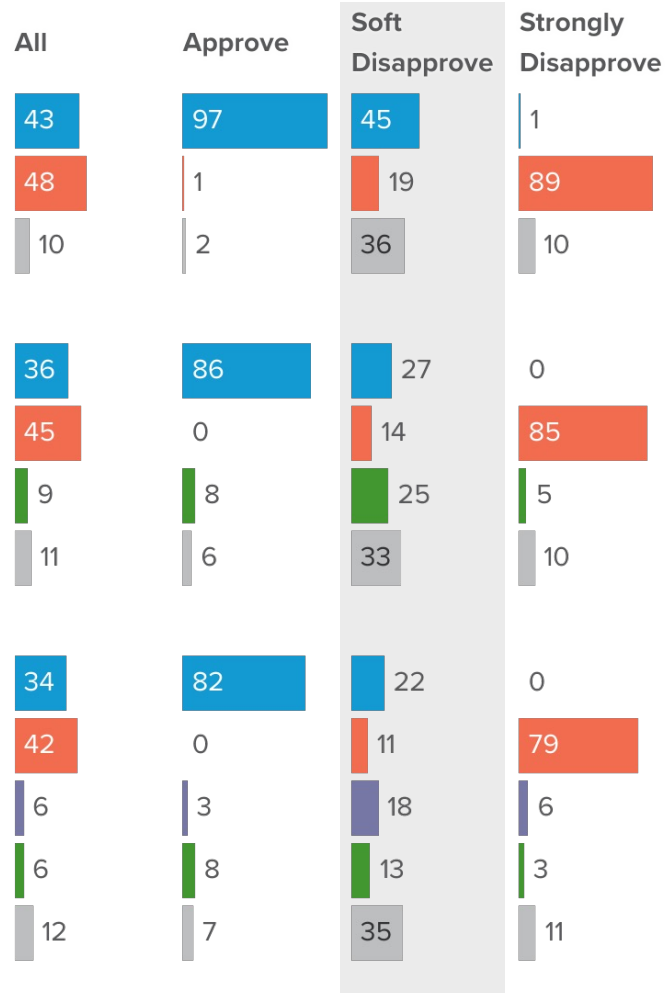


Current Presidential Vote Preference by Biden Approval

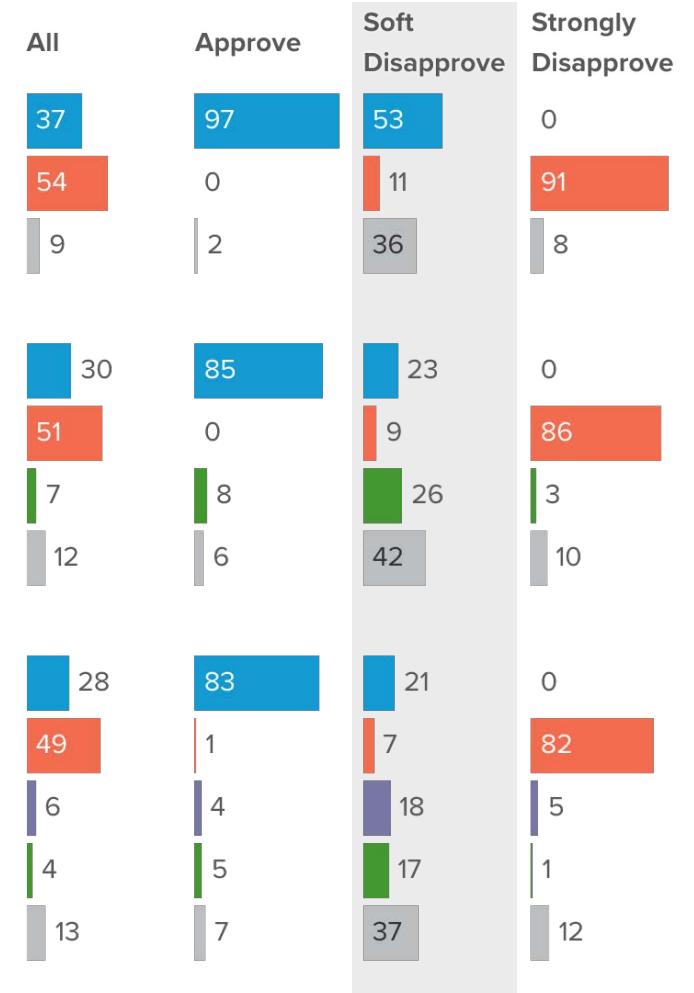
Virginia



Ohio



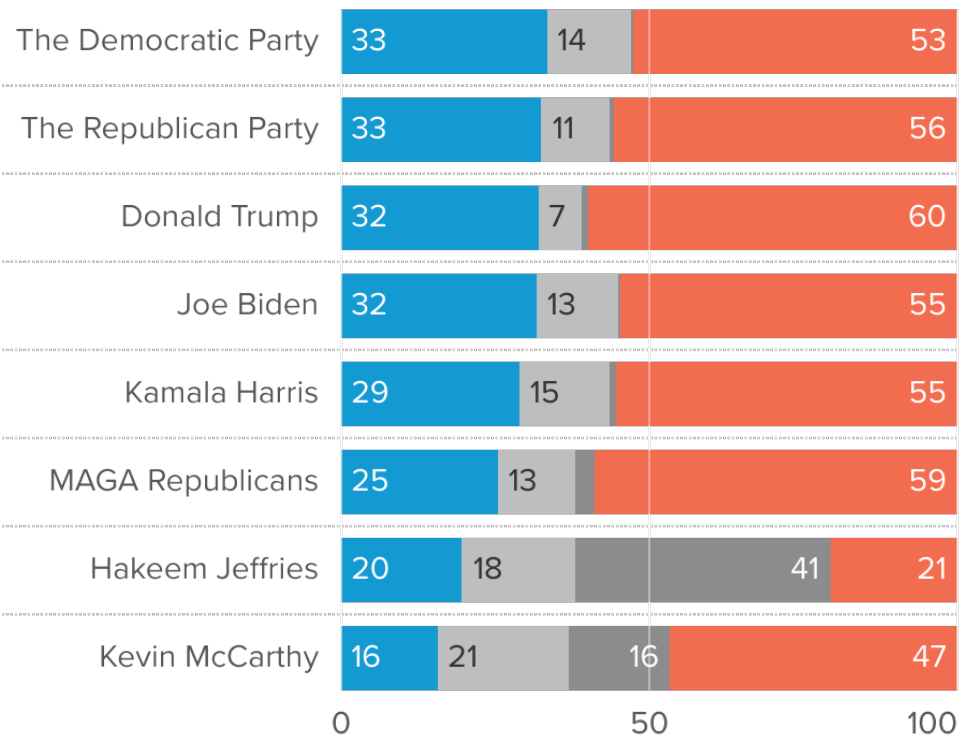
Montana



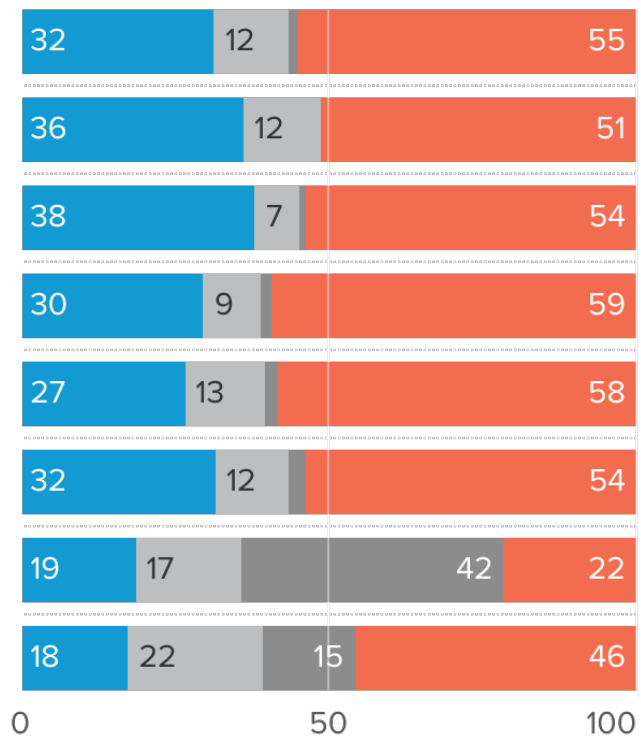
Personal Popularity Ratings – All Voters

● Favorable ● Neutral ● Never Heard ● Unfavorable

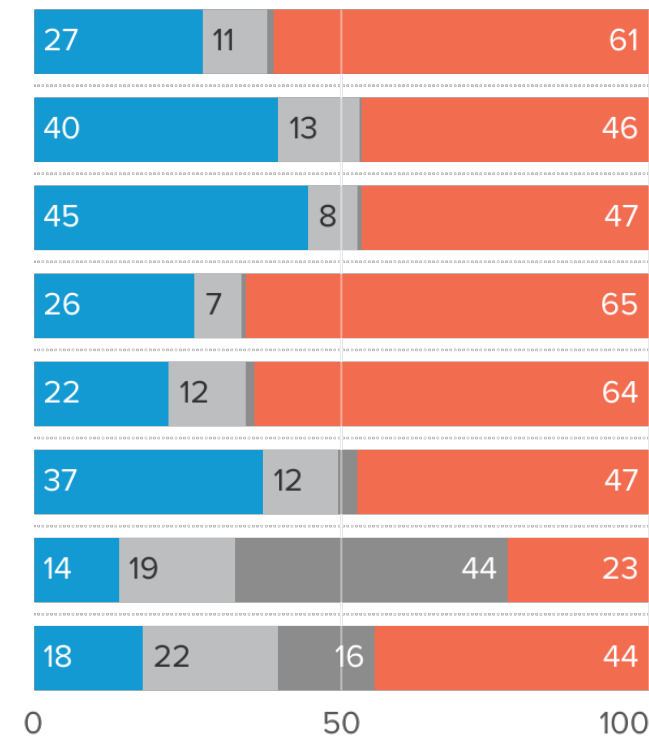
Virginia



Ohio



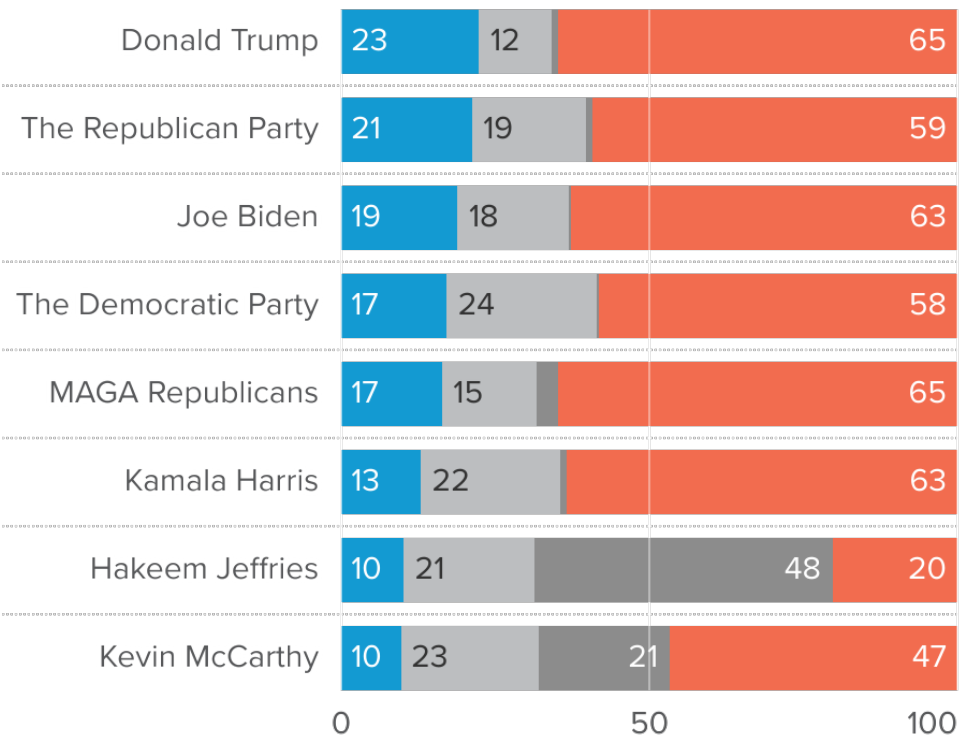
Montana



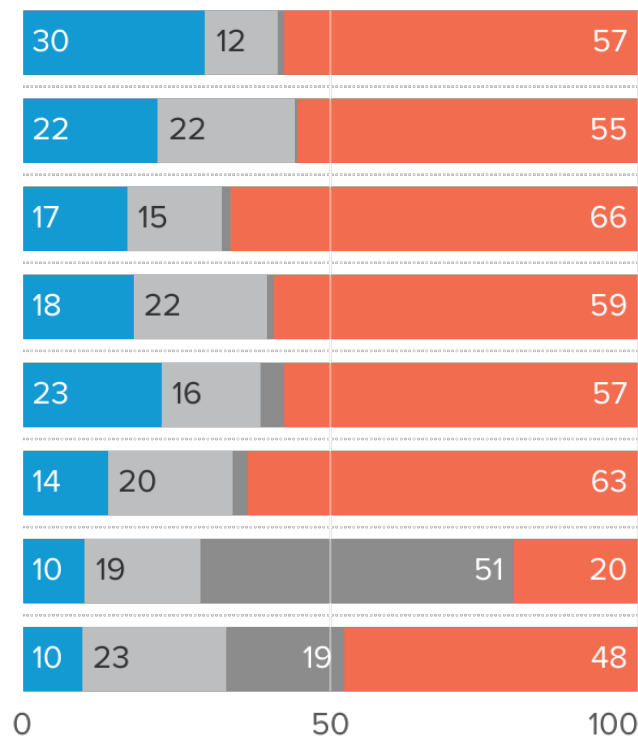
Personal Popularity Ratings – Independents

● Favorable ● Neutral ● Never Heard ● Unfavorable

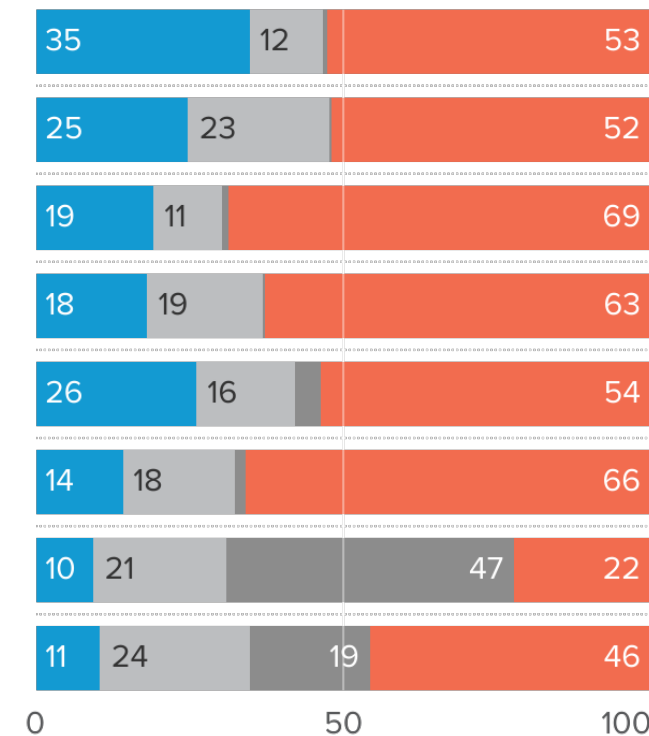
Virginia



Ohio



Montana

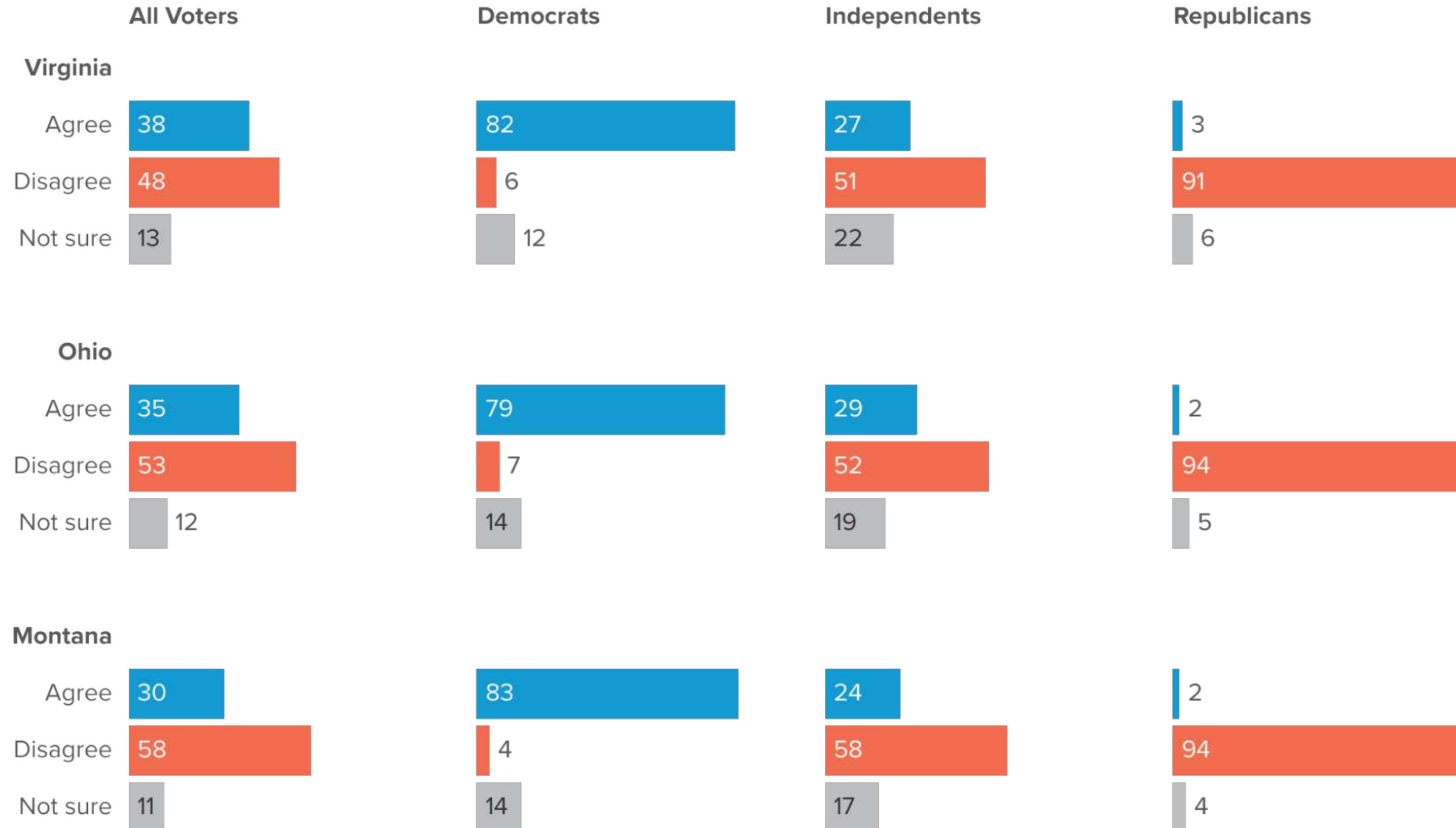


Financial Freedom

Voters in Montana, Ohio, and Virginia support an agenda focused on Financial Freedom over a namesake agenda like Bidenomics

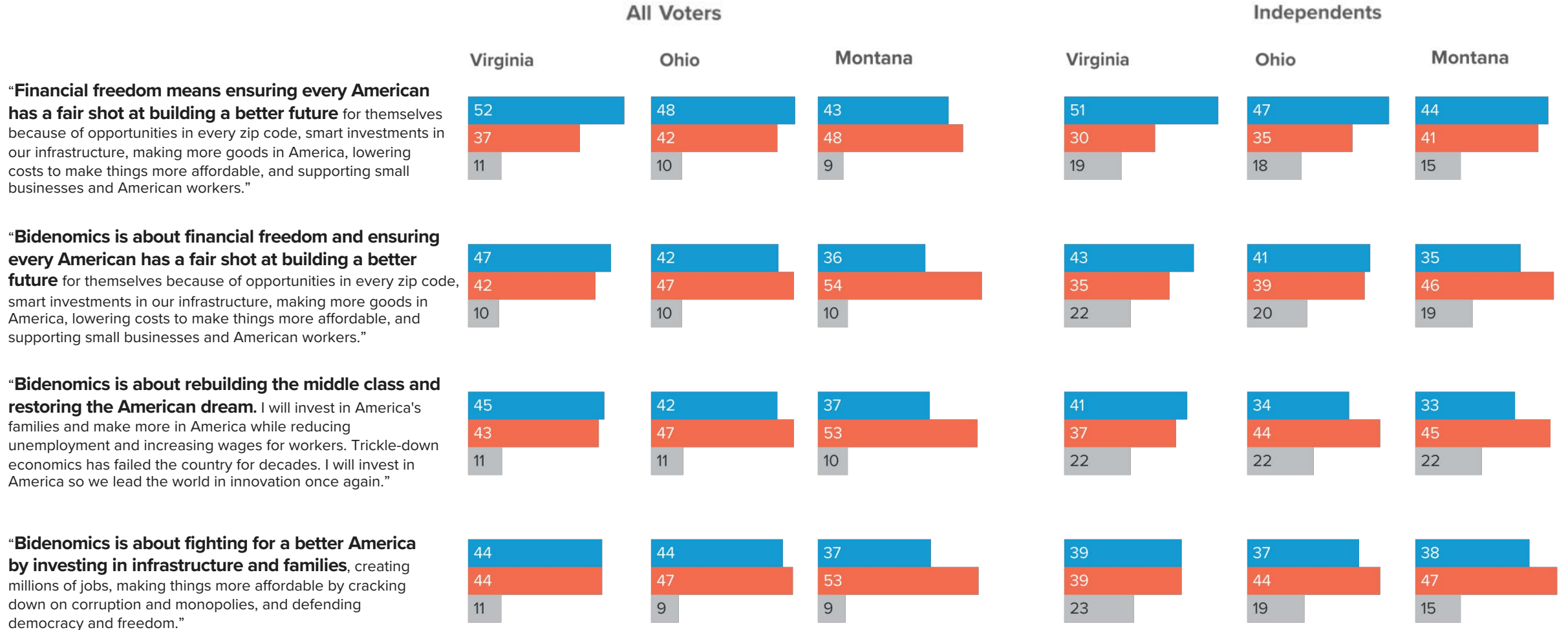
Do You Agree or Disagree with the Following Statement?

“If Joe Biden and the Democrats were successful in passing their economic agenda through Congress, it would help my personal financial freedom.”



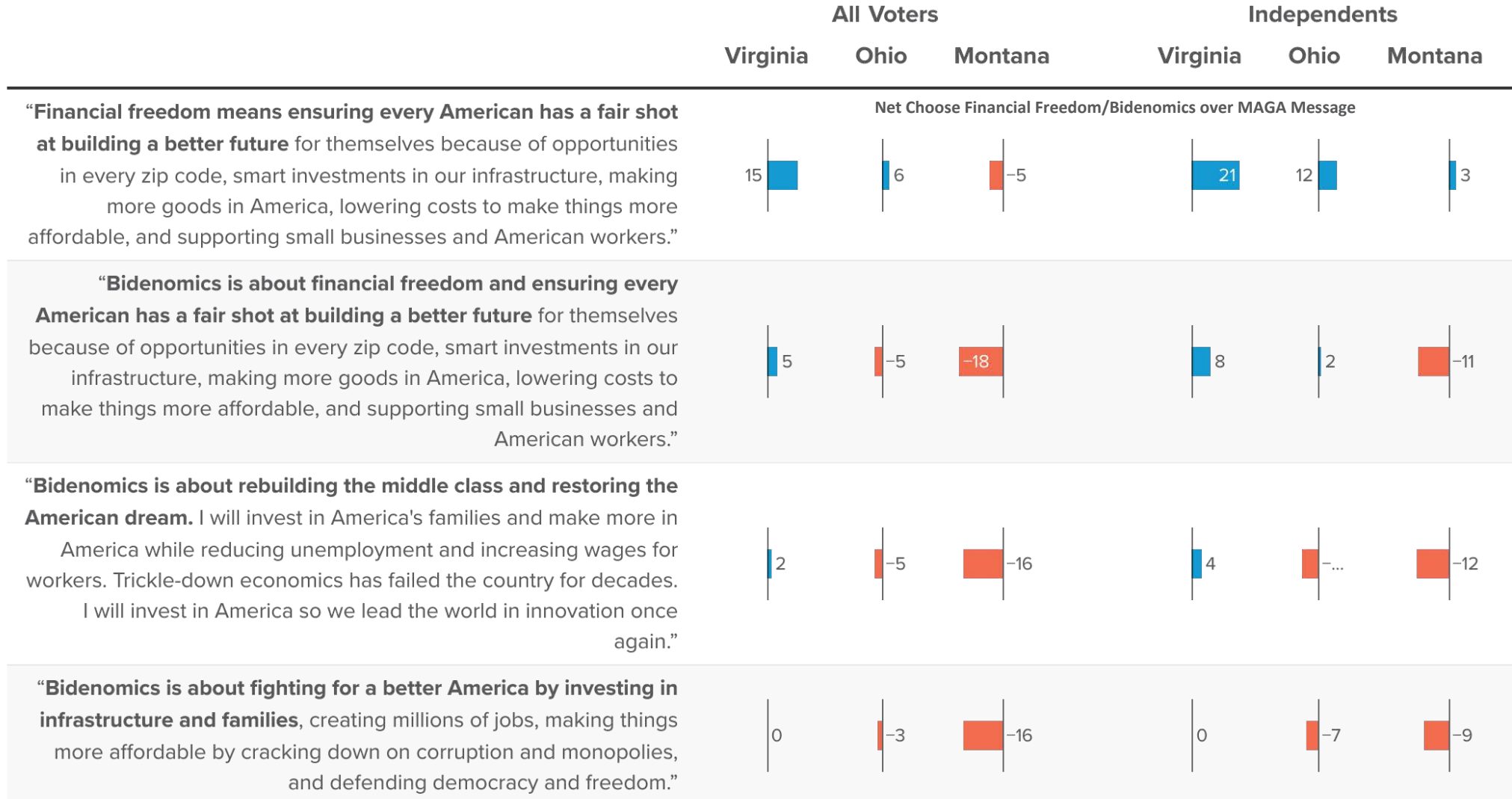
Support for Messages

Voters were asked to choose between a candidate saying the following and a candidate saying they are **“Making America Great Again by getting inflation under control by cutting out-of-control government spending, getting people back to work, cracking down on violent crime, banning Critical Race Theory in public schools, and securing the southern border with Mexico.”**



Support for Messages (Net Gain)

Voters were asked to choose between a candidate saying the following and a candidate saying they are **“Making America Great Again by getting inflation under control by cutting out-of-control government spending, getting people back to work, cracking down on violent crime, banning Critical Race Theory in public schools, and securing the southern border with Mexico.”**



Make Bidenomics = Financial Freedom

*Bidenomics is to Financial Freedom as Reaganomics is to trickle-down.
The Freedom Frame is flexible. Nearly every issue can be framed through this argument, both for individual and financial interests, which are more interconnected than ever.*

Individual Freedom

Reproductive Rights & Bodily Autonomy

Safety & Reducing Gun Violence

Voting & Democracy

Marriage Equality & LGBTQ Rights

& more



Financial Freedom

Affordable & Quality Healthcare

Investment in Infrastructure, Technology & Resources

Ability to Prepare & Save for Retirement

Support for Small Businesses & American Workers

& more

*82% of voters in swing states and incumbent congressional districts agree with the statement:
“True individual freedom cannot exist without economic security and independence.”*

Issues Offer Opportunities for Values Messaging

The Freedom Frame can be used for nearly every issue. Here are five key examples:

Individual Freedom Frame

“Investing in broadband enhances Americans’ individual freedoms by creating a catalyst so that every citizen has opportunities for growth, education, civic discourse, and the ability to pursue their passions without limitation.”

Investments in Infrastructure like Broadband

“Reproductive freedom and bodily autonomy are the cornerstone of Americans’ individual freedom. These fundamental freedoms empower Americans to make deeply personal choices without government interference.”

Reproductive Rights & Bodily Autonomy

“Made in America means every American has more individual freedom – from making purchasing decisions to promoting ethical and sustainable production practices. Made in America empowers the freedom of choice.”

Made in America

“Affordable higher education means that Americans have the individual freedom and opportunity to pursue their academic and career passions, rather than being driven solely by the need to repay debt.”

Student Loans & College Affordability

“After a lifetime of work, Americans deserve the individual freedom to enjoy their retirement and live out their golden years in dignity. That means protecting and expanding Social Security and Medicare, which is paid for by American workers.”

Social Security & Medicare

Financial Freedom Frame

“Investments in improving access to affordable broadband internet expand financial freedom and unlocks a world of opportunities to start a business or pursue a career, no matter your ZIP code.”

“Reproductive freedom is a kitchen table issue. Ensuring access to affordable and safe healthcare services safeguards financial freedom by allowing Americans to pursue their goals while planning for a family.”

“Building a resilient Made in America economy is crucial to our financial freedom. American consumers should be empowered to make financial decisions that don’t break the bank and aren’t determined by global supply chains.”

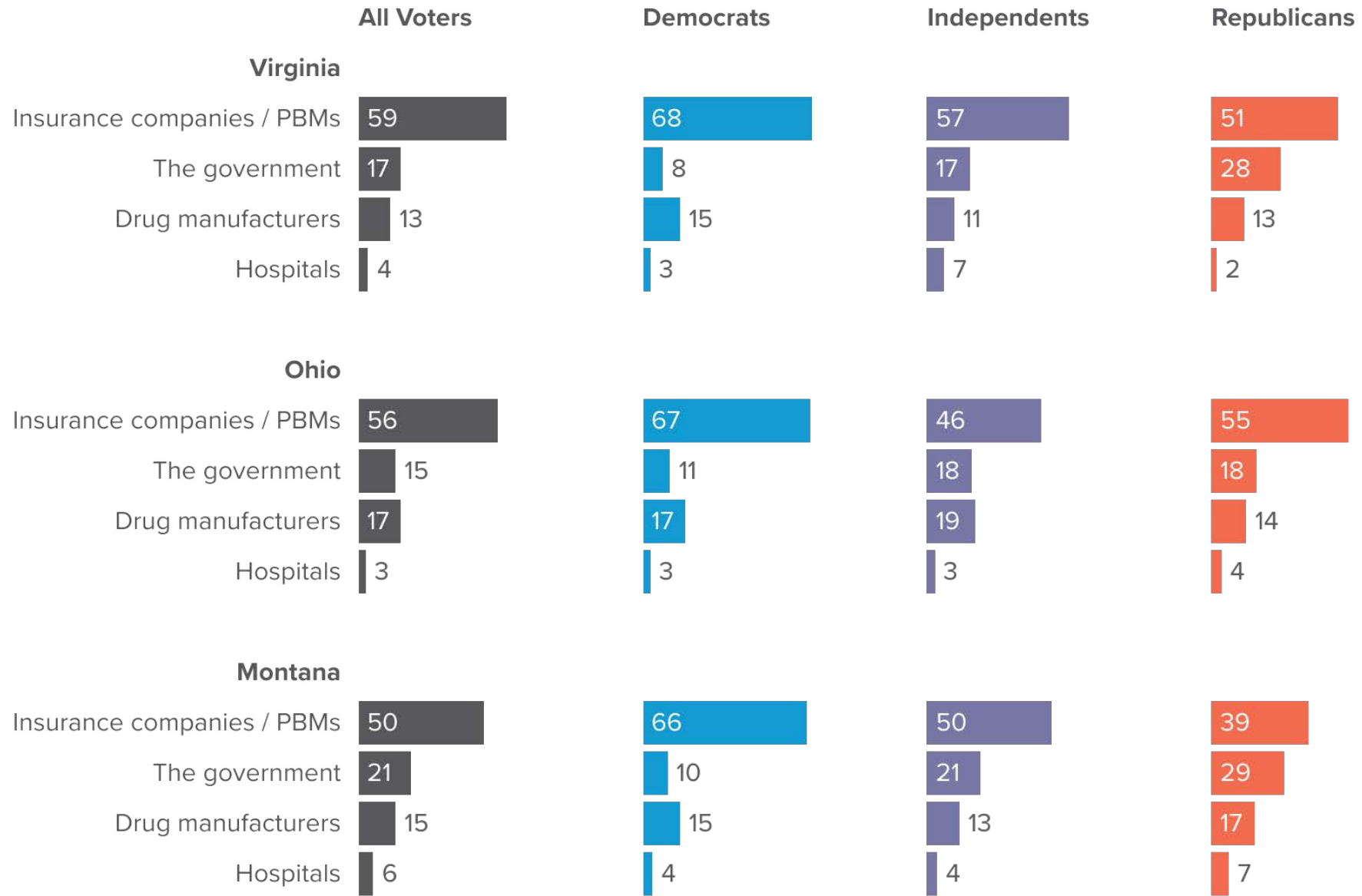
“Making sure every American has access to affordable higher education without a lifetime of debt empowers citizens with the financial freedom to enter the workforce and pursue their passion without the burden of debt.”

“Americans should have the financial freedom to live their lives in retirement without the fear of high costs. That’s why we must protect and expand Social Security and Medicare, a sacred promise that millions of Americans have invested in their retirement.”

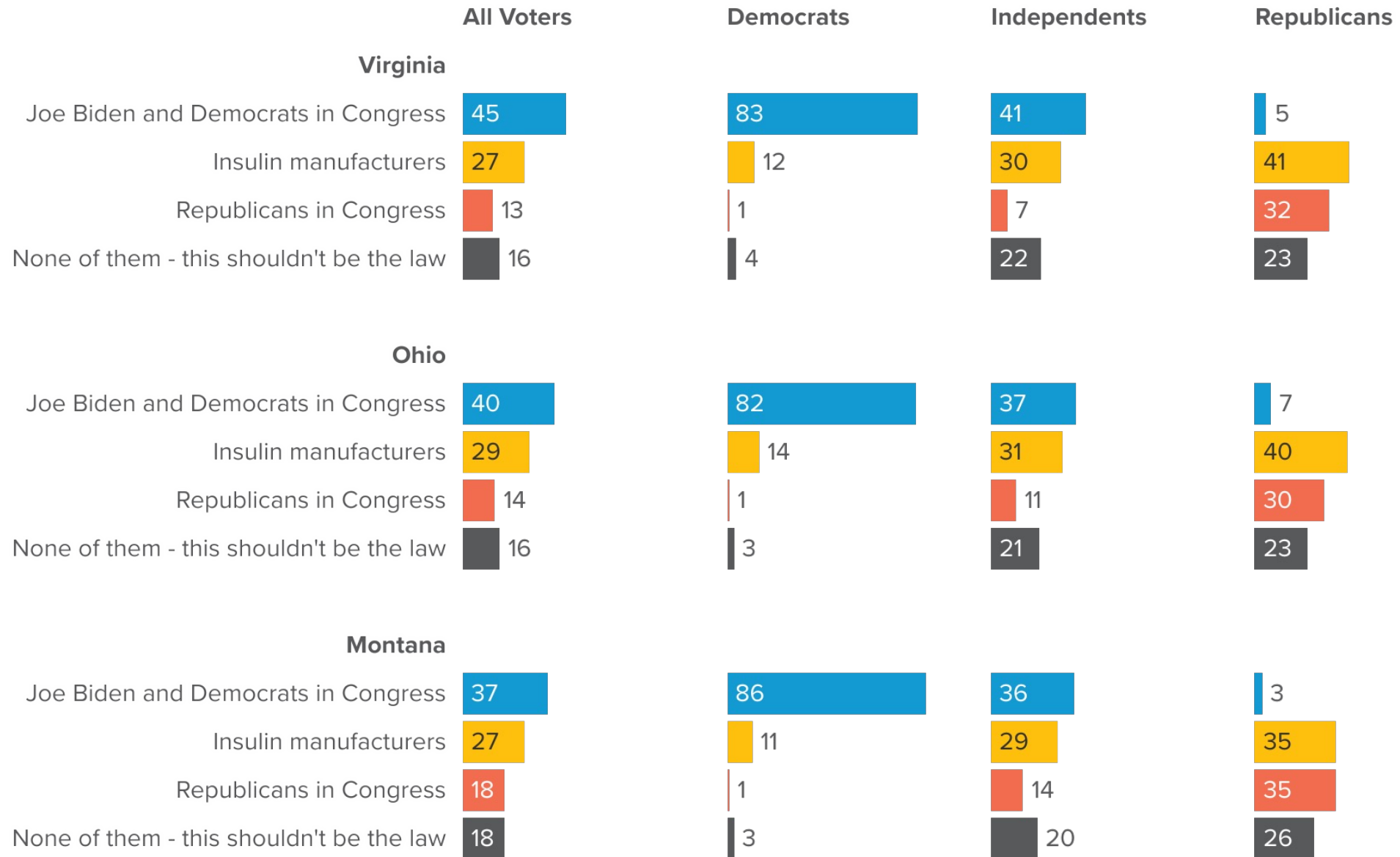
Opportunities to Deliver on Lowering Healthcare Costs

Bipartisan majorities support common-sense reforms to lower costs and increase price transparency

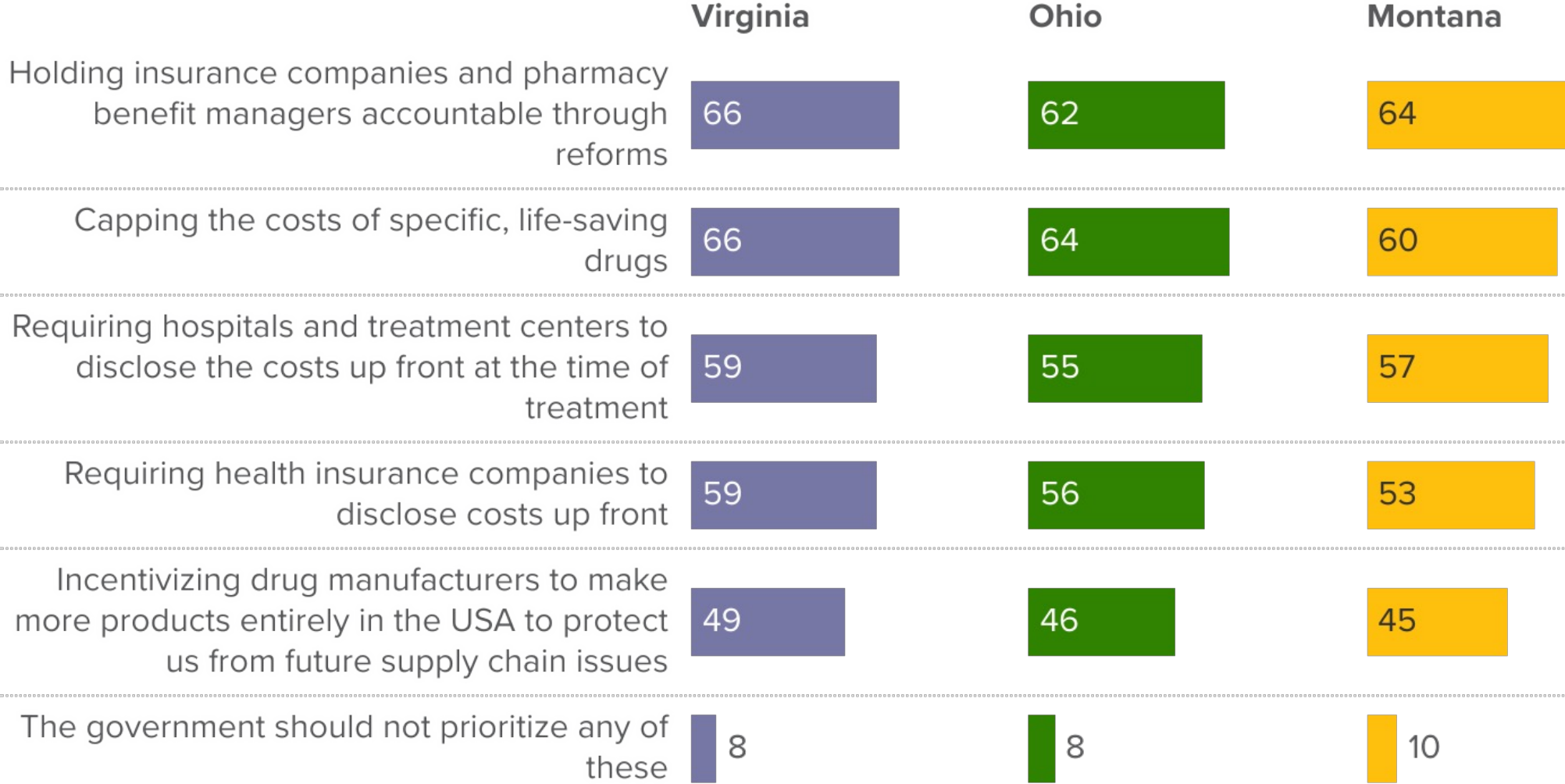
Who Do You Think Is Most Responsible for the Cost of Health Care?



Who Do You Think Deserves the Credit for the \$35 Insulin Cap?

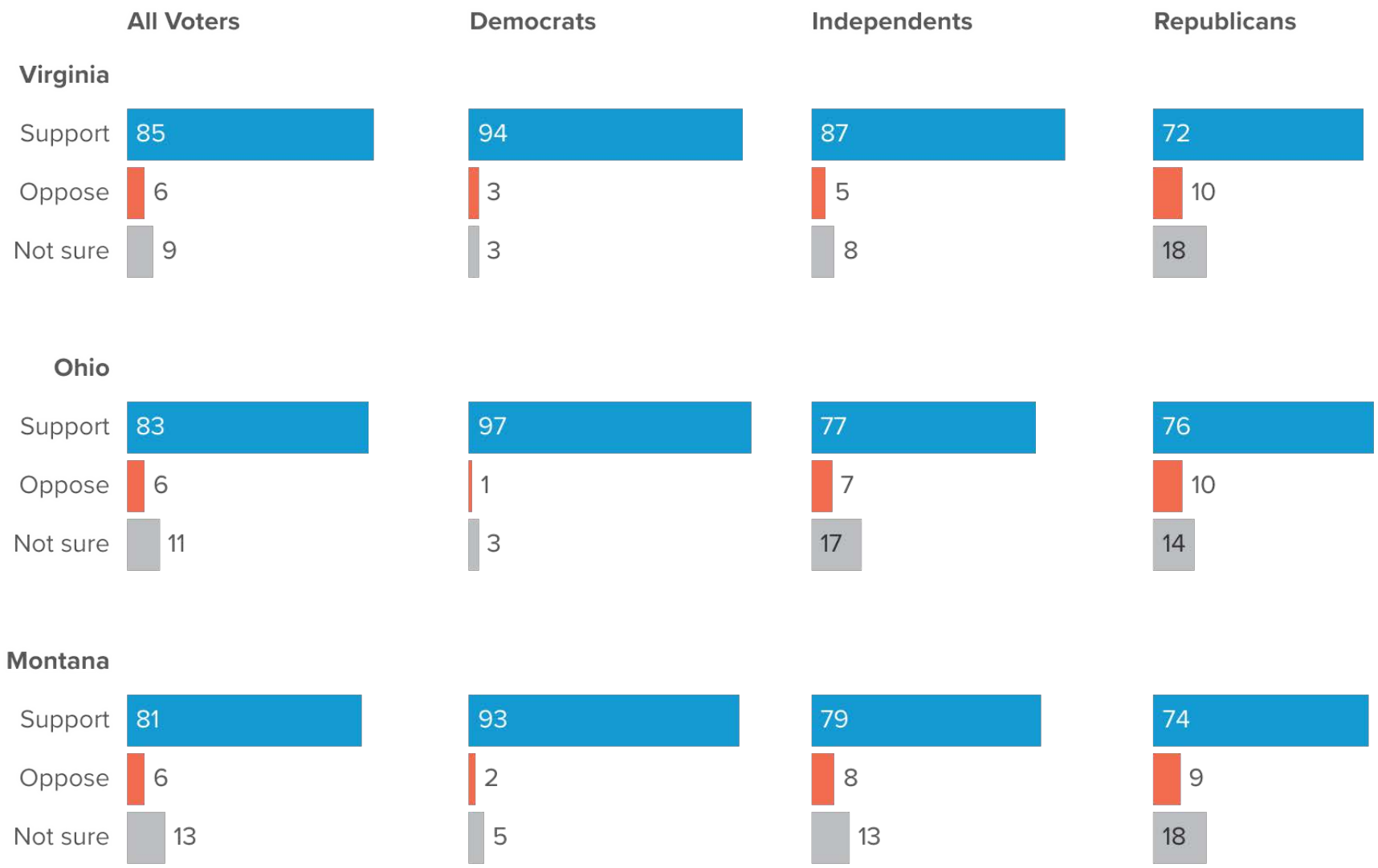


What Should the Government Next Prioritize When It Comes to Lowering Health Care Costs?



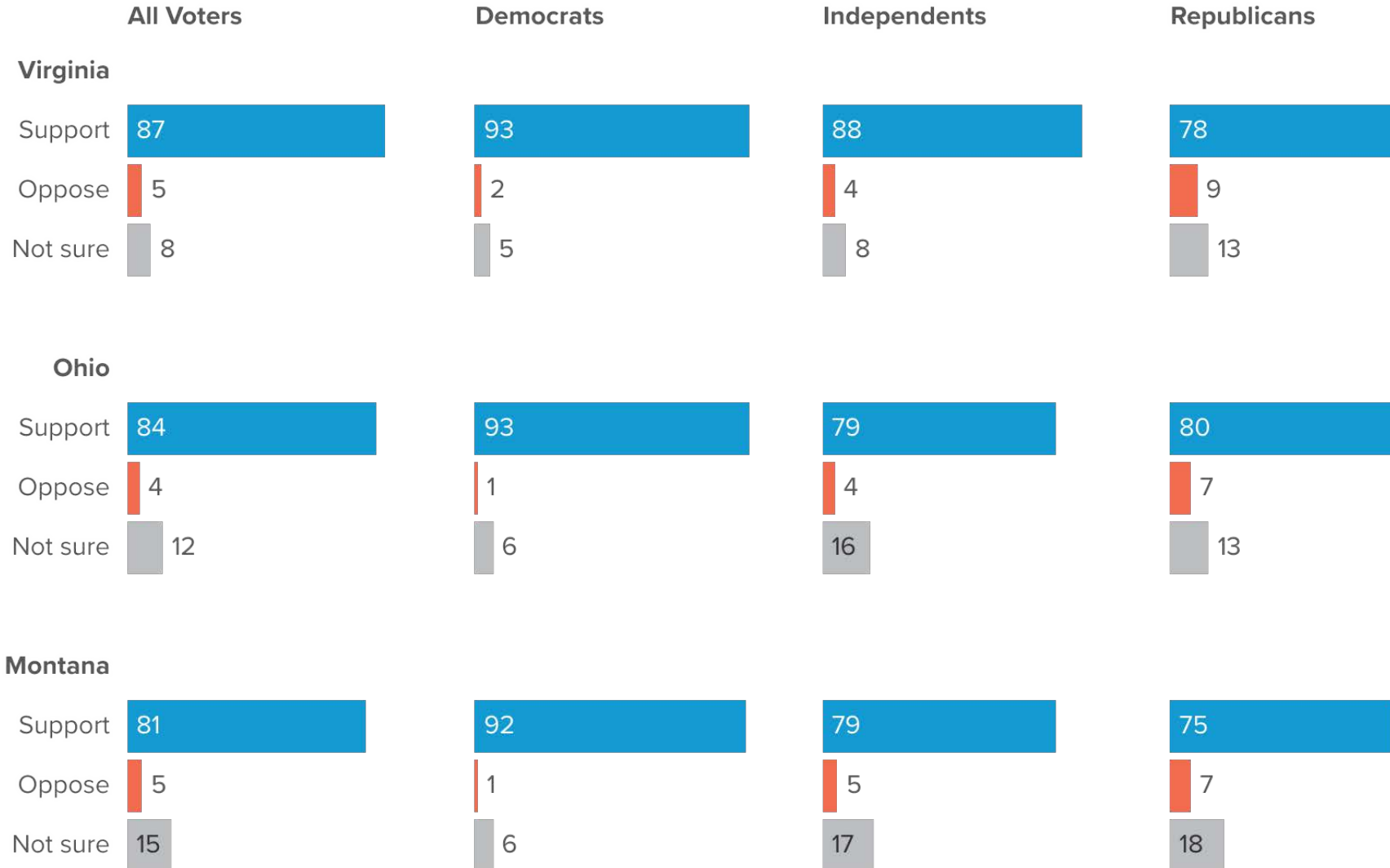
Support for Fining Hospitals for Not Meeting Transparency Requirements

“Hospitals found to be in violation of the current transparency requirements are subject to a maximum fine of \$5,500 per day. The Biden administration has issued hundreds of warning letters but has only fined more than a dozen non-compliant hospitals hundreds of thousands of dollars. Do you support or oppose imposing the fines required by law?”

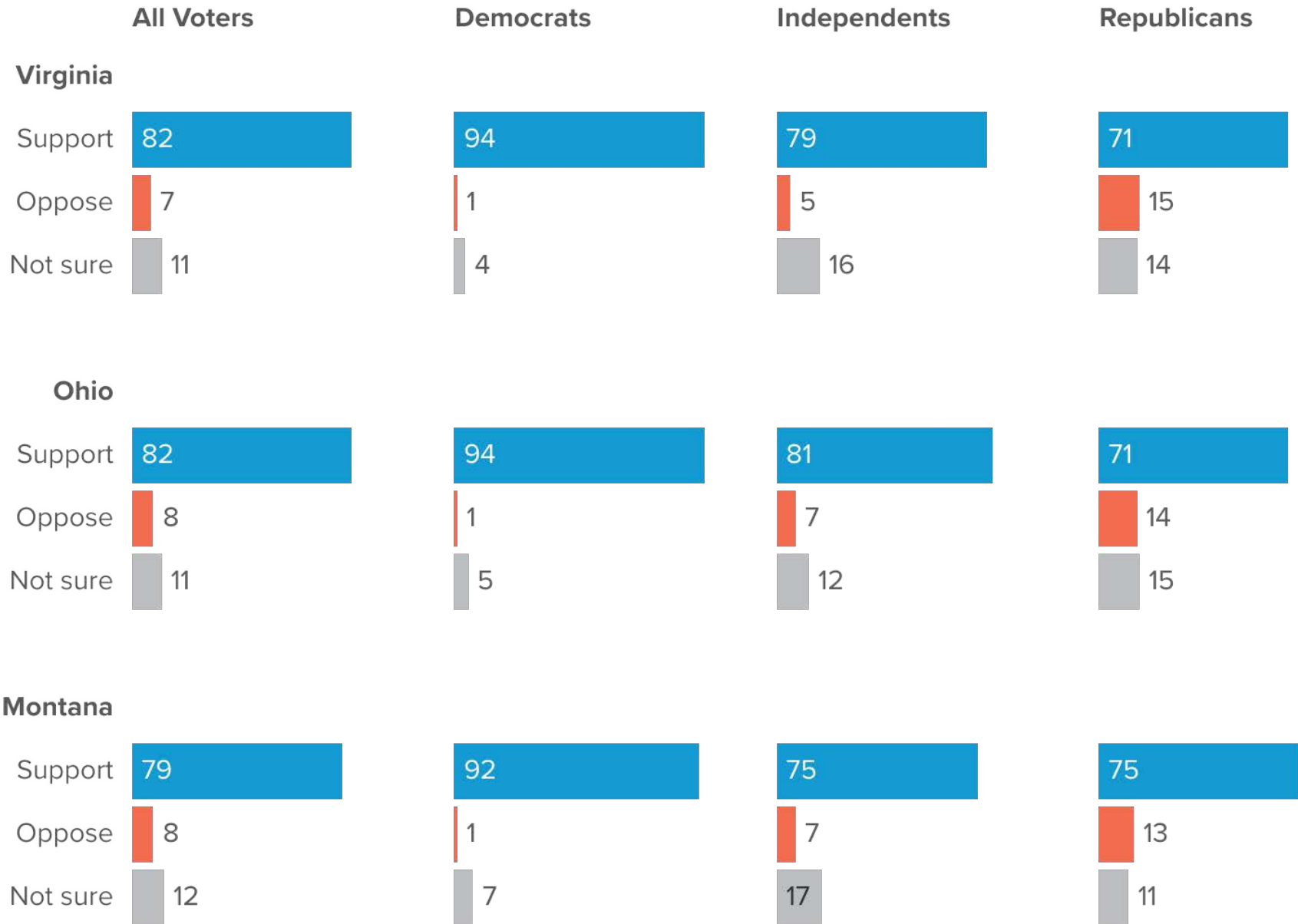


Support for the Patient Act of 2023

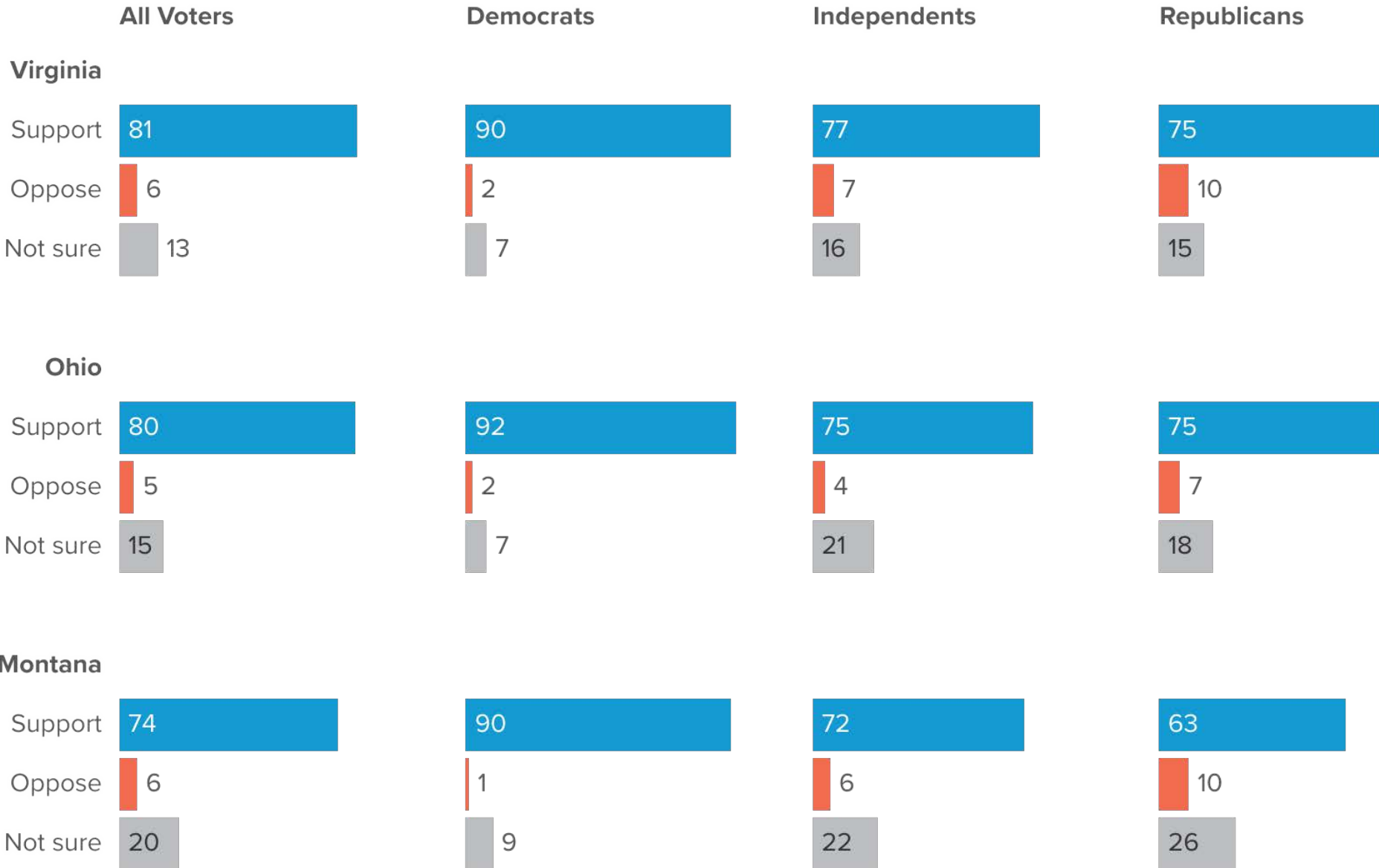
“The Patient Act of 2023 requires hospitals and insurance companies to publicly post procedure prices, including all negotiated rates, for doctor and hospital services. It bolsters federal hospital and health insurance price transparency rules that historically have been plagued by a lack of compliance and standards.”



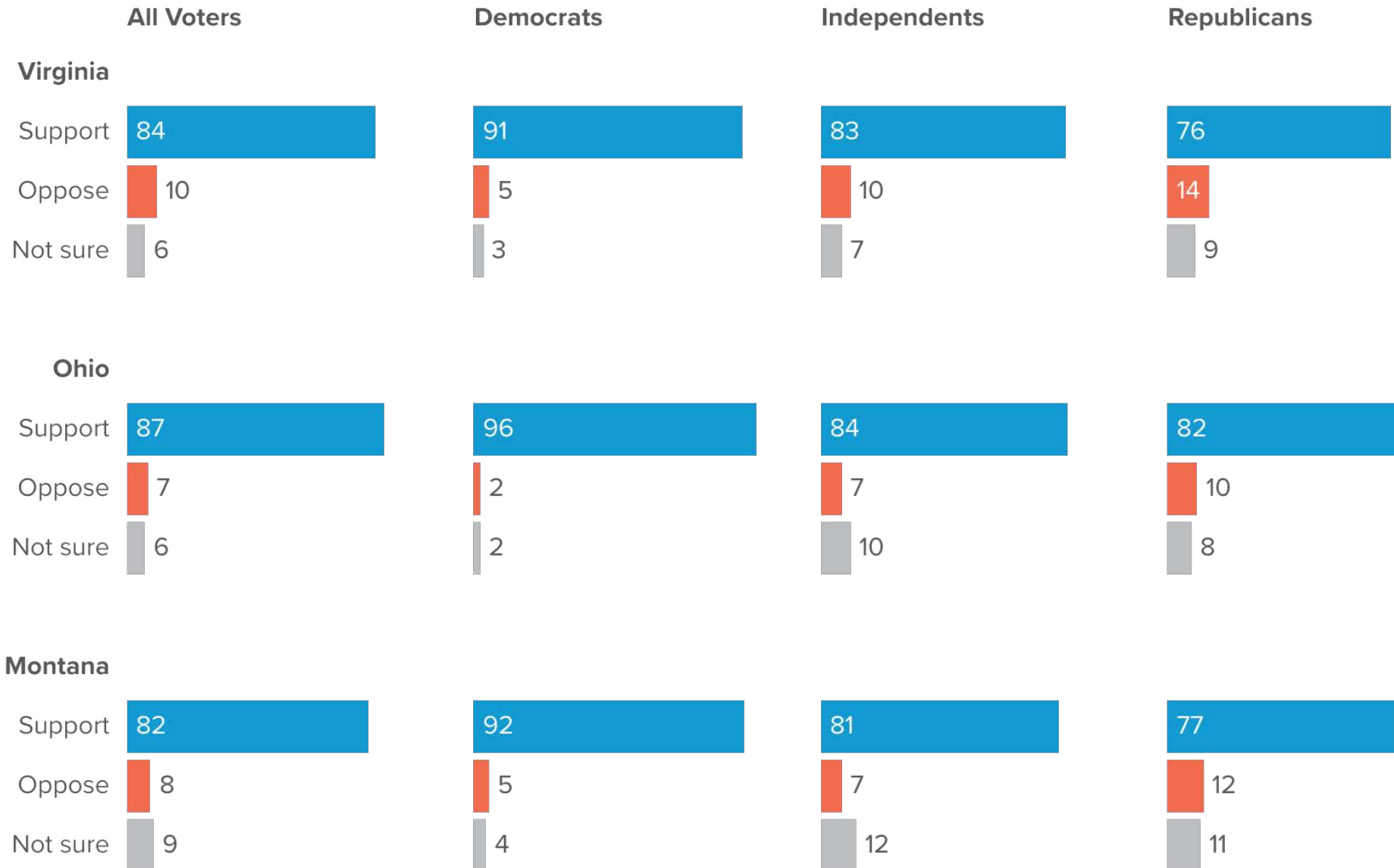
Support for Regulating Health Insurance Companies and PBMs by Requiring Greater Data Transparency for Patients and Employers?



Support for Requiring Health Insurance Plans to Evaluate the Outcomes of Their Coverage

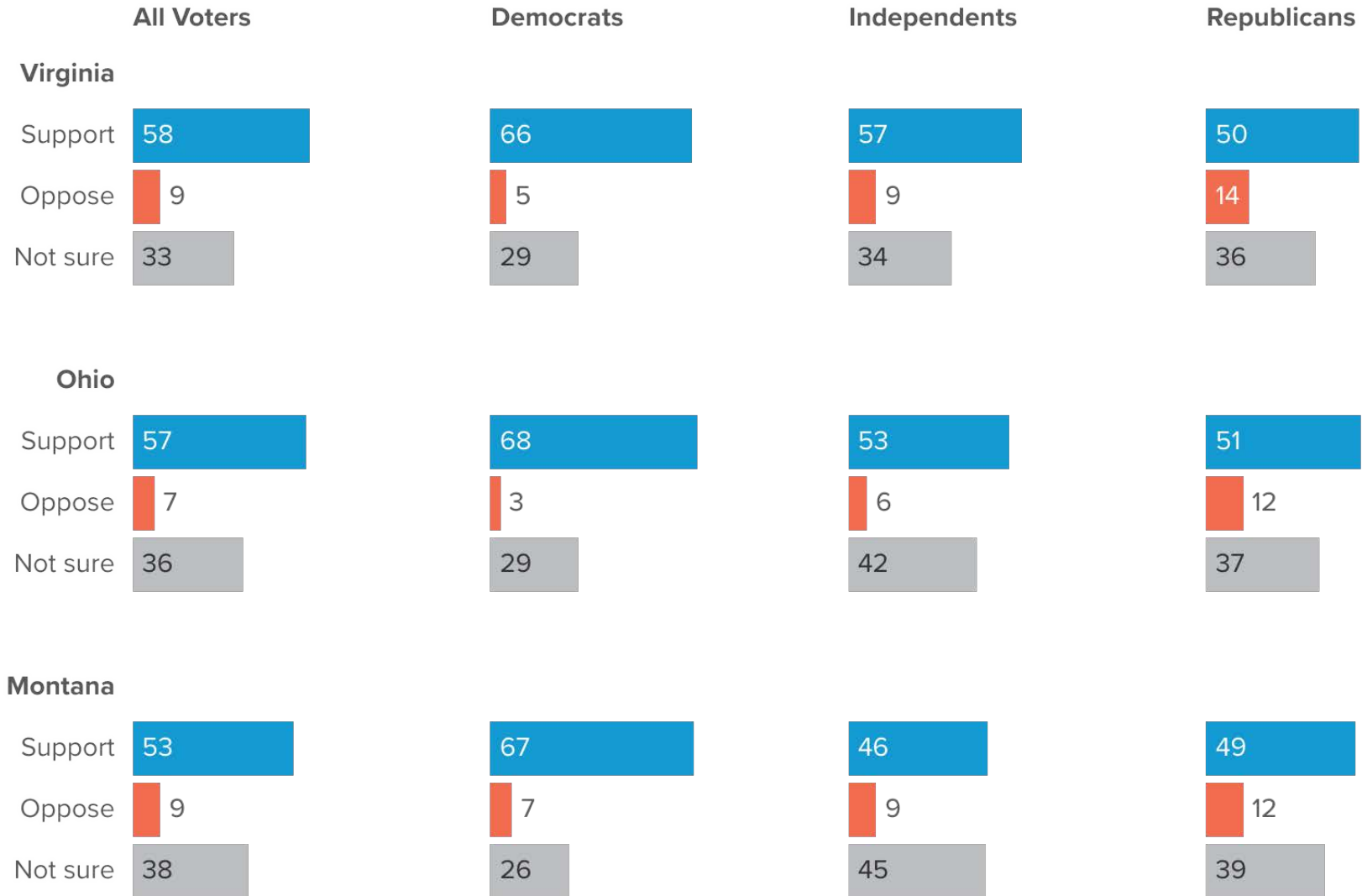


Support for Stopping Insurers from Charging up to 24x More than Generic Medicines



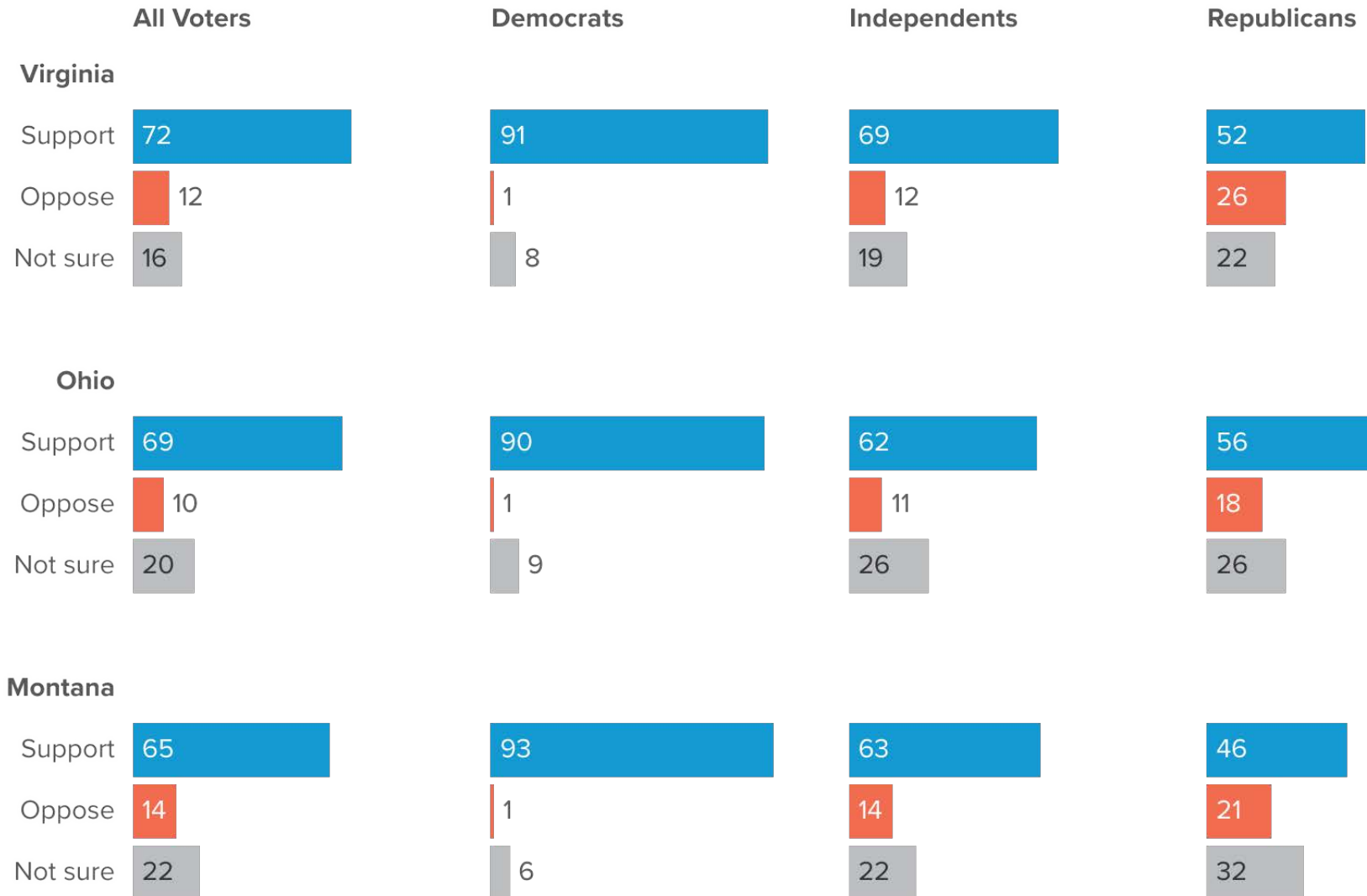
Support for the Healthy Competition for Better Care Act

“The Healthy Competition for Better Care Act prohibits health insurance plans and provider networks from restricting patient incentives to use specific providers, requires the plan to enter into more agreements with the provider network or its affiliates, and requires plans to agree to certain payment rates with entities that are not part of the contract. Do you support or oppose this legislation?”



Support for the Behavioral Health Crisis Care Centers Act

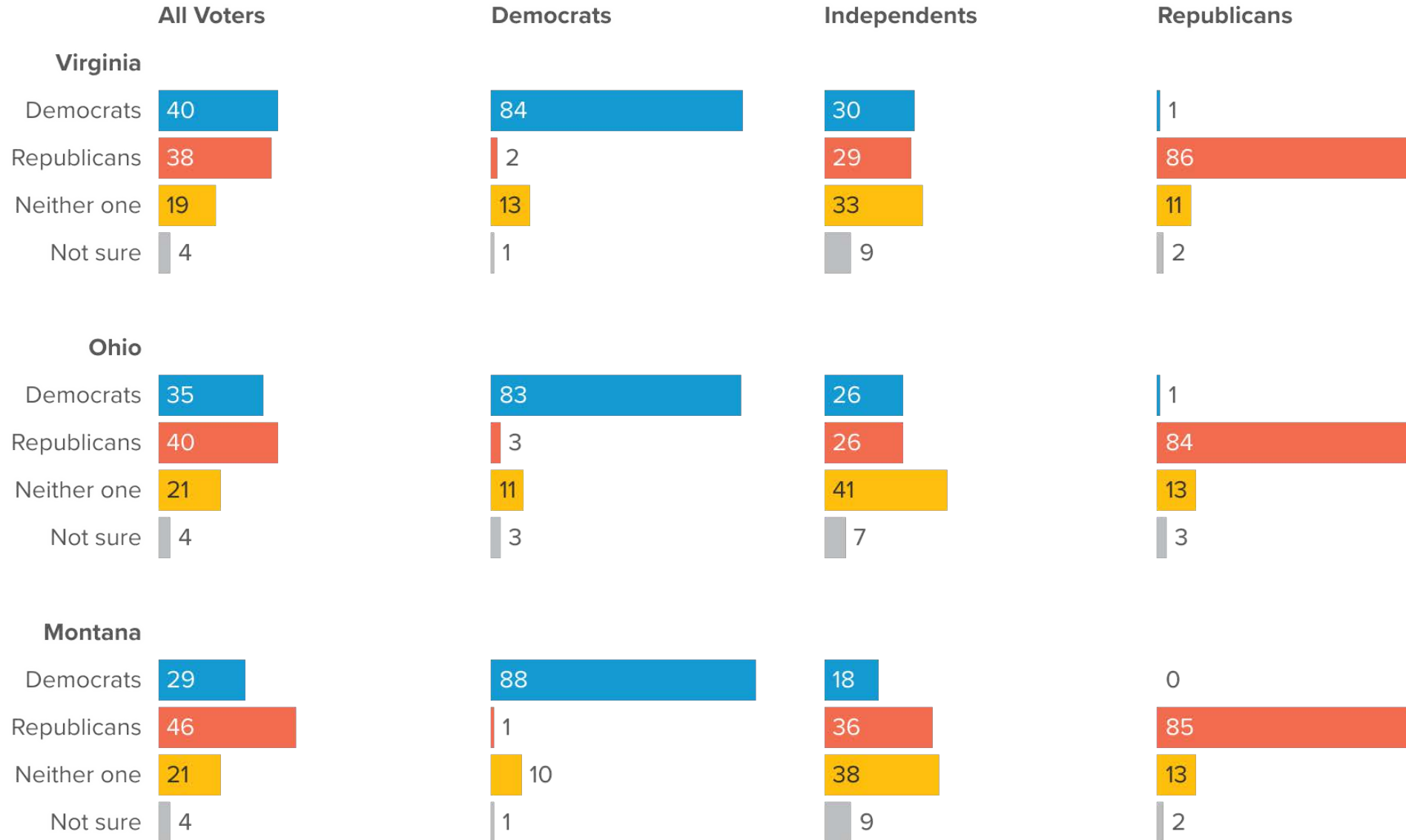
“Do you support or oppose the Behavioral Health Crisis Care Centers Act, a proposed federal law that would provide grant funding for states, cities and counties, and tribal governments to build and expand crisis stabilization services with housing assistance and other wrap around services?”



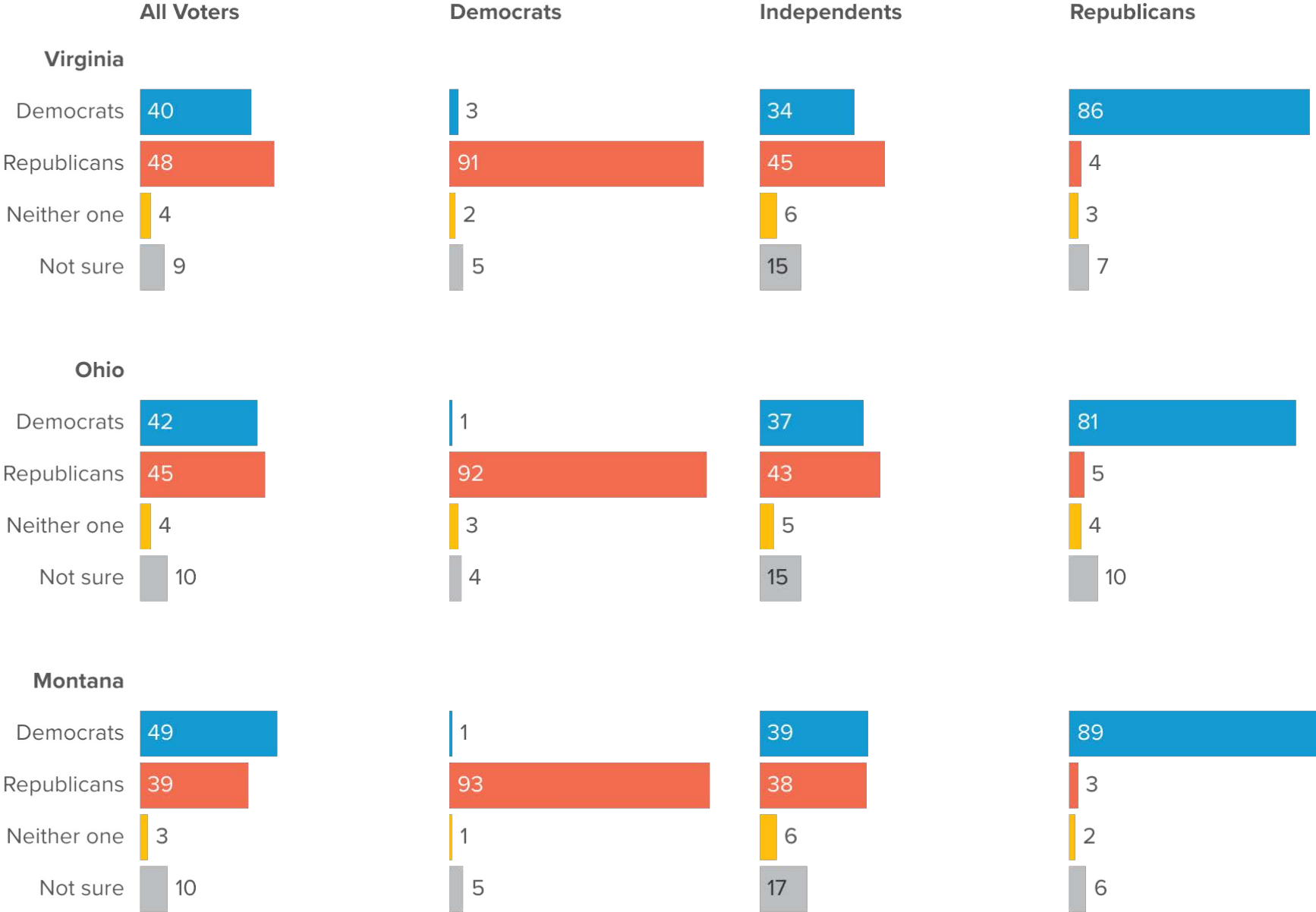
Contrasting Visions

Voters reject key elements of the MAGA agenda and see Republicans as more extreme in certain instances

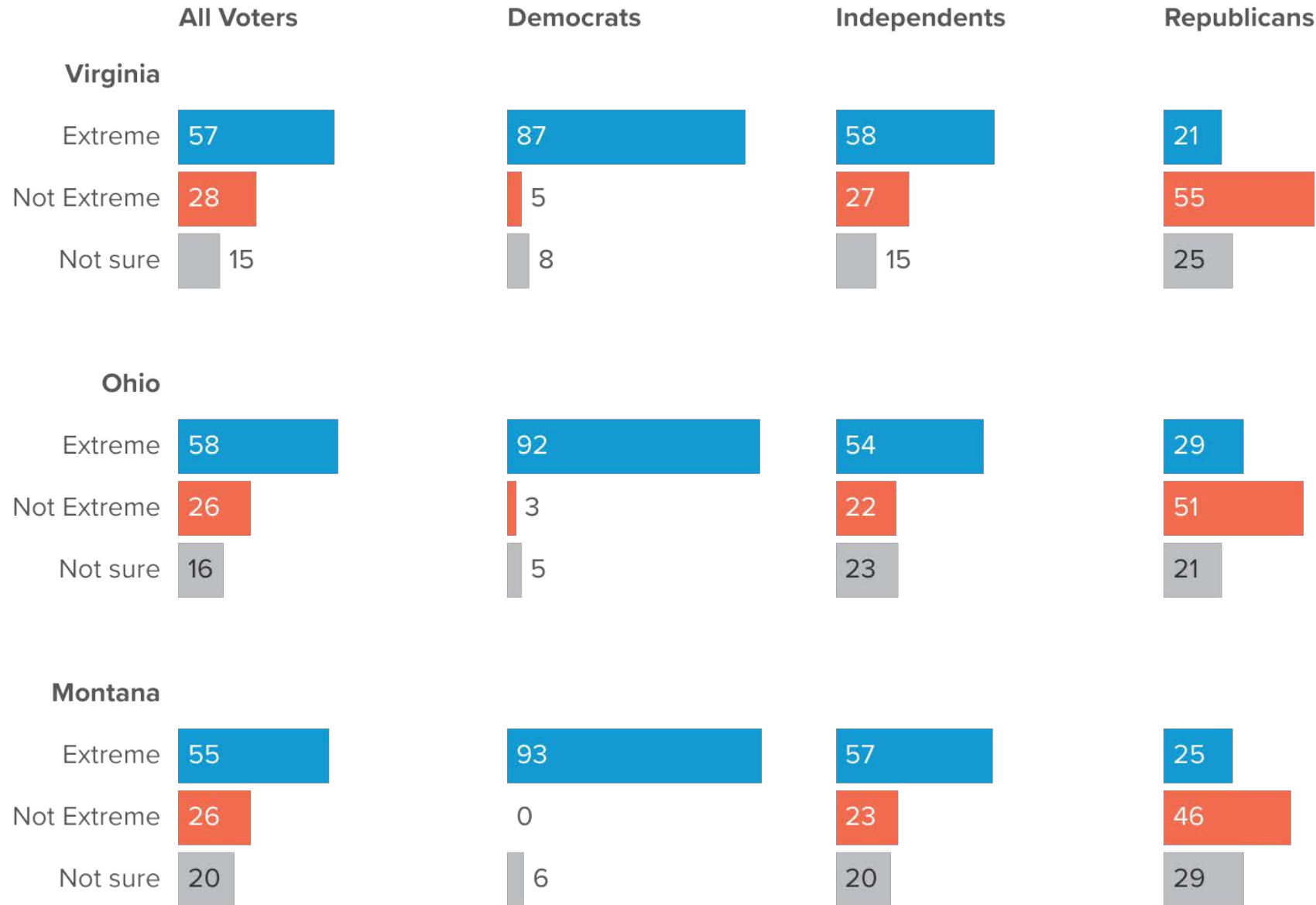
Which Group Will Protect Your Freedoms?



Which Group Has More Extremists?



How Extreme is the Circuit Court of Appeals Ruling Limiting Access to Mifepristone*?

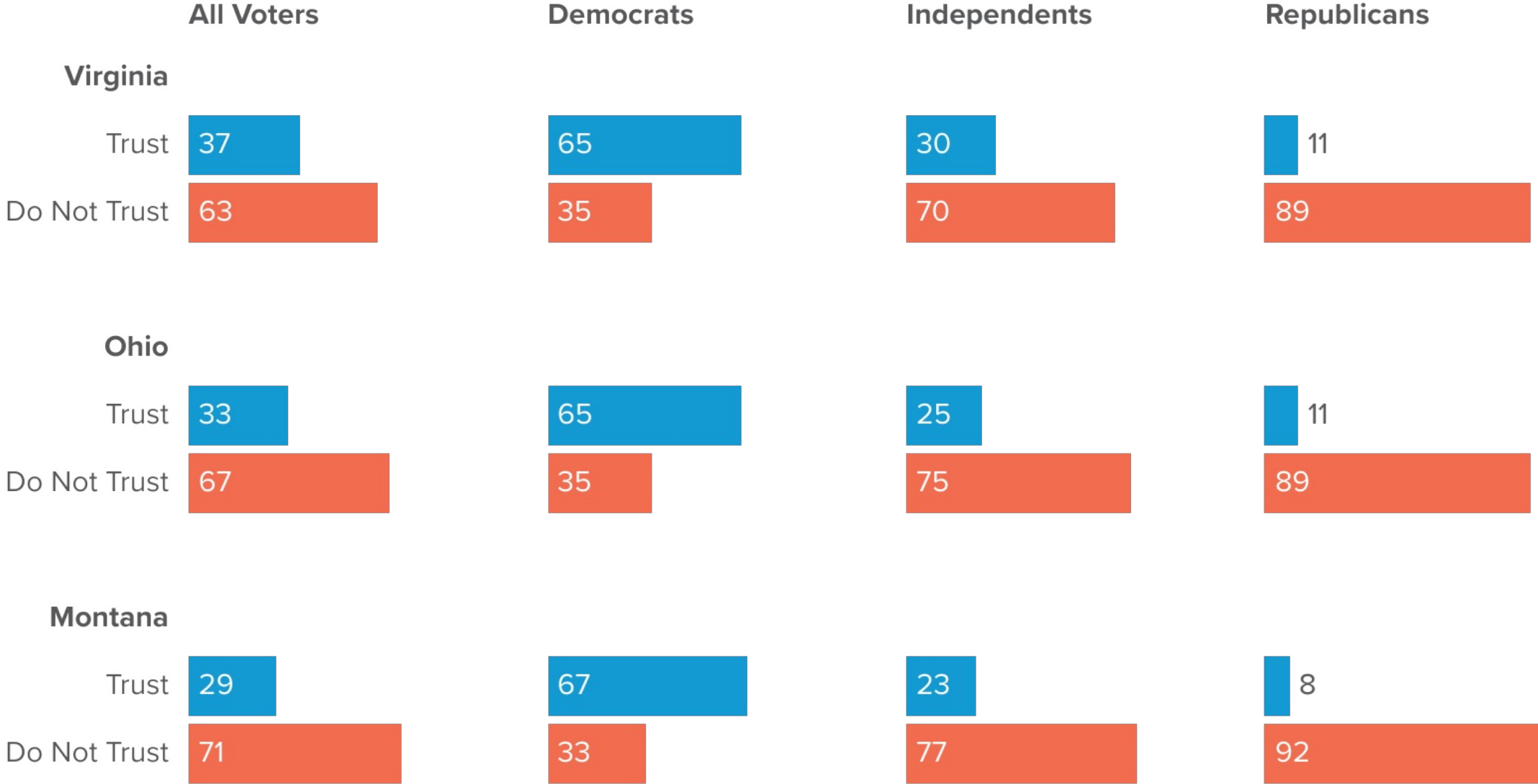


* Mifepristone is a progesterone blocker that can end a pregnancy that is less than 10 weeks along

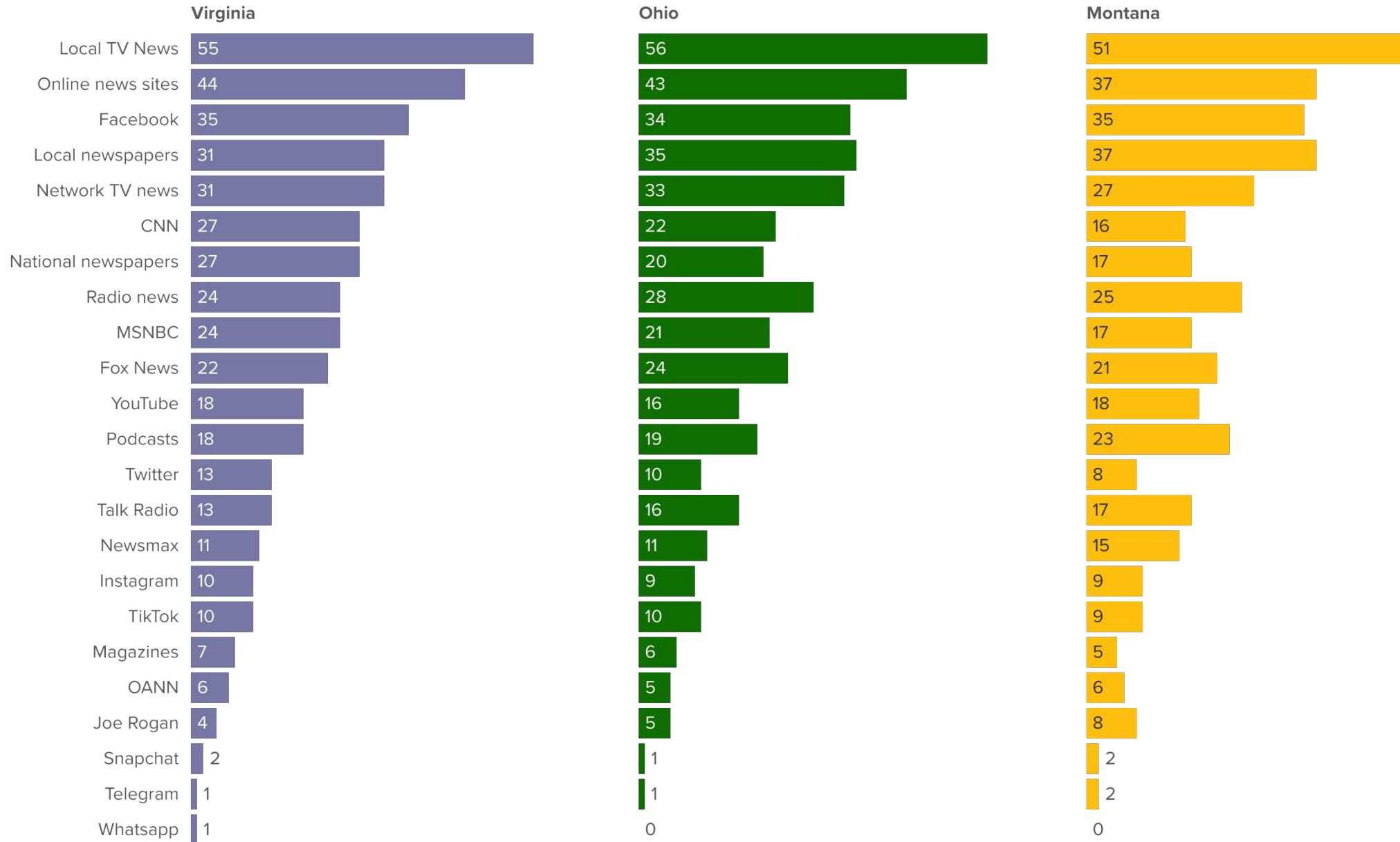
Voter Trends in Media Consumption

Distrust in the news media persists, and voters continue to rely on local TV news

Trust in Media



Media Sources Consumed



Media Sources Consumed

	Virginia				Ohio				Montana			
	All	Dem	Ind	GOP	All	Dem	Ind	GOP	All	Dem	Ind	GOP
Local TV News	55	61	52	51	56	63	52	54	51	56	48	51
Online news sites	44	45	51	35	43	46	48	35	37	42	41	31
Facebook	35	34	31	39	34	34	33	36	35	35	34	36
Local newspapers	31	38	32	21	35	43	32	31	37	43	41	29
Network TV news	31	38	30	23	33	46	27	26	27	41	28	16
CNN	27	41	25	13	22	40	17	9	16	32	16	4
National newspapers	27	37	29	13	20	33	17	10	17	31	18	5
Radio news	24	26	29	18	28	29	31	25	25	25	26	24
MSNBC	24	41	22	5	21	41	14	8	17	31	18	4
Fox News	22	3	17	49	24	6	18	47	21	3	15	41
YouTube	18	17	21	15	16	13	21	16	18	13	23	17
Podcasts	18	19	18	17	19	20	21	17	23	25	20	24
Twitter	13	13	15	13	10	10	11	8	8	7	9	8
Talk Radio	13	7	16	18	16	7	16	25	17	6	17	24
Newsmax	11	1	8	27	11	2	10	21	15	1	11	28
Instagram	10	12	10	10	9	10	9	7	9	11	7	8
TikTok	10	13	10	5	10	13	11	7	9	11	10	7
Magazines	7	8	8	5	6	8	4	5	5	7	6	4
OANN	6	0	4	16	5	0	5	9	6	0	4	11
Joe Rogan	4	1	4	8	5	0	6	9	8	0	8	14
Snapchat	2	2	2	2	1	1	2	1	2	2	3	2
Telegram	1	0	1	3	1	0	1	2	2	0	4	3
Whatsapp	1	0	2	0	0	0	0	0	0	0	1	1

Summary & Next Steps

Stopping the anti-freedom agenda supported by many Republicans is paramount to saving America's democracy and economy. Voters want their Individual Freedom protected, but trust Democrats less to improve their Financial Freedom.

- **Costs are the driver of the issues landscape.** Voters overwhelmingly are dissatisfied with how they see America's economy working. More than three quarters say their incomes are falling behind the cost of living, more than 70% are worried about affording groceries this winter, and nearly 80% of voters of voters in the three states say they are concerned about an unexpected \$1,000 cost. While efforts to ease inflation are showing signs of success, voters are not yet feeling these impacts.
- **Financial Freedom moves Independents.** Voters are more interested in an agenda that works toward "Financial" or "Economic Freedom" rather than namesake policy agendas. Democrats trail Republicans on which group voters trust to improve their financial freedom. Bidenomics is a policy blueprint, and the Freedom Frame is a way to advocate for it based on shared values. Voters are skeptical of broad claims of economic success when it does not match their lived experiences. A reignited labor movement is just one manifestation of this chronic financial frustration. Voters want more action to give them a fair shot to succeed in America.
- **Voters are still displeased with Republican extremism.** Even in more conservative states, the MAGA agenda is seen as extreme. More than half of voters in each state reject the recent conservative Court ruling banning the abortion pill mifepristone. In most cases, Independents are more likely to see Republicans as more extreme than Democrats.

Future Majority will continue its voter research and messaging operation, as well as partner with other stakeholders, to continue developing the Financial Freedom argument. As always, we welcome ideas, feedback and more allies in the fight.



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