

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

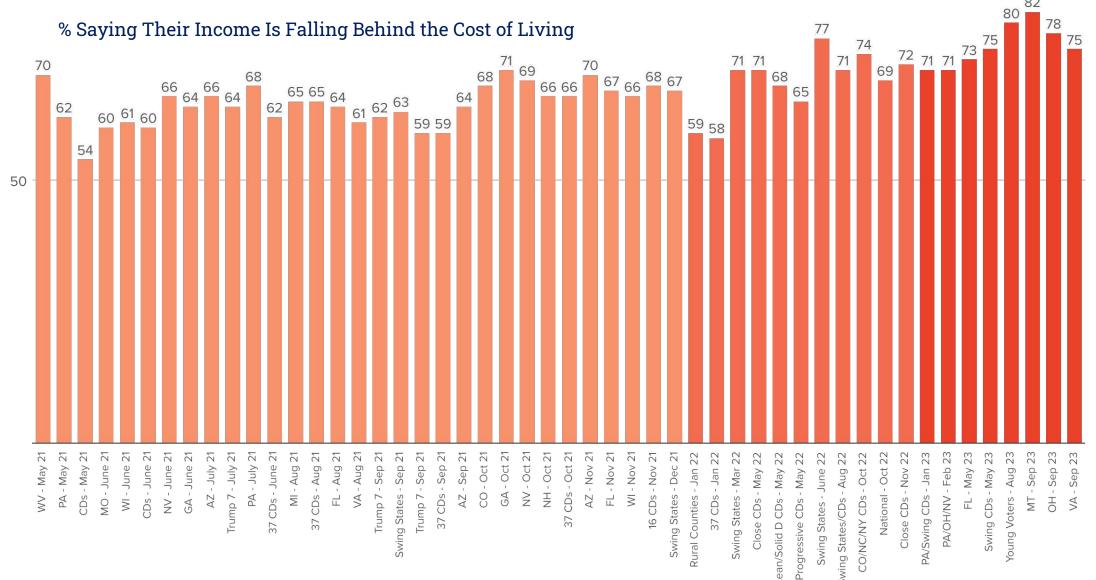
On nearly every measure, voters in these three states feel underwater with their personal finances and are looking for solutions to these challenges

This Chart Defines the Last Three Years





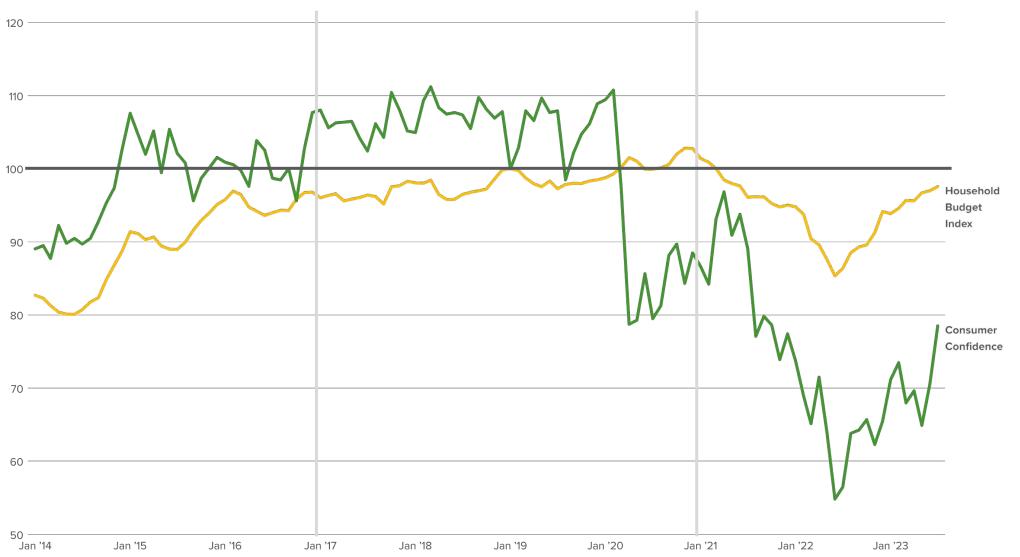
The share of voters saying their income has been falling behind the cost of living has consistently risen during the last three years in states and congressional districts across the country



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.

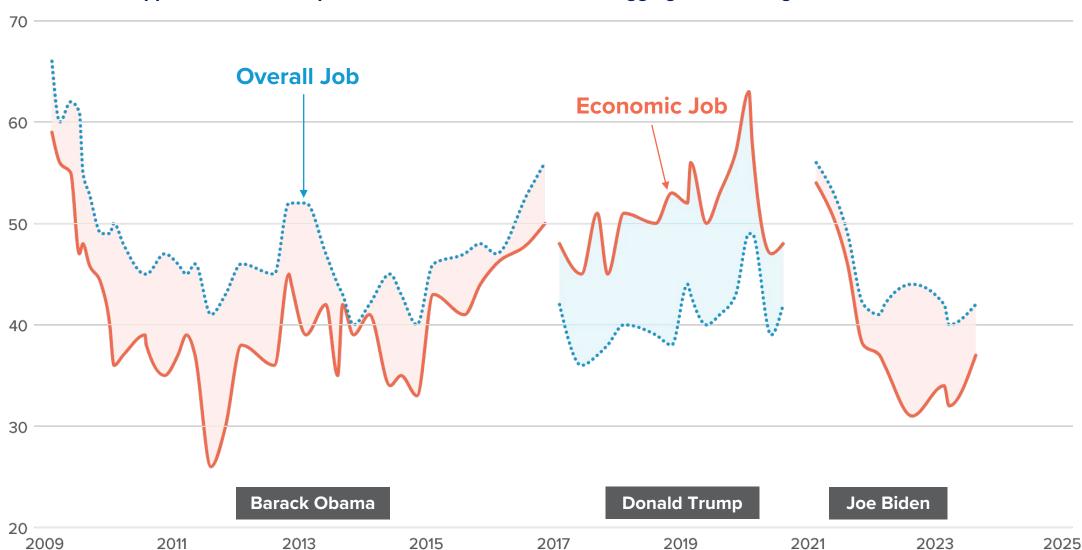
Confidence ran ahead of purchasing power during Trump's presidency and behind it during Biden's presidency so far.

Comparison of Overall Job Rating and Economic Rating for Recent Presidents





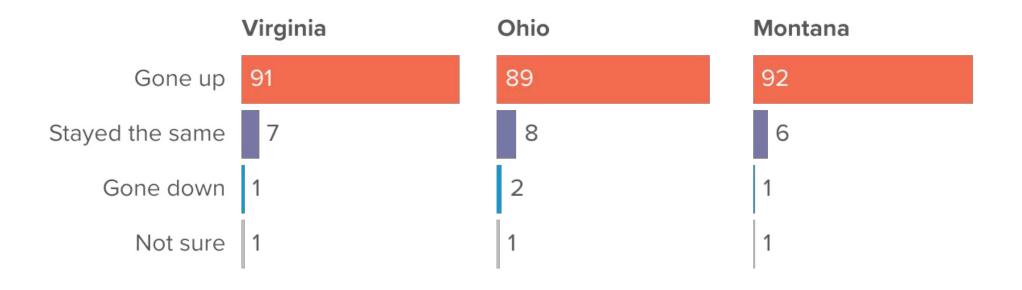
Voters consistently rated Obama worse on the economy than they did overall. The opposite happened under Trump. Biden has continued Obama's lagging trend throughout his term so far.



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

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

Most Important Issue for Congress

The Supreme Court overturning Roe v. Wade and allowing states to ban abortion

The rising costs of goods like groceries and gas

Attacks on democracy and voting rights

The amount of taxes you pay

Cost of prescription drugs

Investing in public schools

Fighting racism in America

China taking US jobs

Impeaching Joe Biden

I don't like the other party

Creating more good jobs in your community

The war between Russia and Ukraine

The US trade war with China

Investing in America's infrastructure

The cost of housing

Gun violence

Violent crime

Illegal immigration and the situation at the U.S.-Mexico border

Extreme weather events and the impact of climate change

Stopping the teaching of Critical Race Theory in public schools

Student loan debt relief or the high cost of higher education

The shortage and delays of goods and supply chain problems

Legalizing cannabis for recreational or medicinal use

The attack on the US Capitol on January 6th, 2021

Restriction of LGBTQ rights, such as their right to marry and access to transgender care





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Viigiiia					
	Dem	Ind	GOP		
	33	54	71		
	6	32	69		
	46	29	16		
	46	30	9		
	10	33	42		
	28	31	22		
	26	23	24		
	43	22	4		
	21	28	22		
	23	25	15		
	13	20	29		
	37	19	3		
	4	17	38		
	27	18	6		
	30	14	6		
	14	17	19		
	8	17	23		
	25	13	8		
	15	17	9		
	22	11	3		
	3	13	21		
	12	10	13		
	3	12	21		
	0	7	28		
	4	2	3		

Ohio

All	Dem	Ind	GOP
53	33	55	69
37	4	34	68
31	54	29	14
25	44	24	9
25	9	29	36
23	24	31	16
25	27	28	20
22	45	19	4
22	21	28	19
18	25	19	10
17	12	19	19
16	32	16	2
21	3	19	37
17	29	16	6
17	34	16	4
18	17	22	17
16	7	19	22
16	25	15	8
15	17	18	9
10	20	10	2
12	3	12	19
9	7	12	9
9	2	11	14
11	1	10	20
3	6	2	2

Montana

Ind

GOP

Dem

54 45 30 25 30 35	31 5 48 51 9 38 33	54 42 26 25 33 38	69 75 21 9 42
30 25 30	48 51 9 38	26 25 33	21 9 42
25 30	51 9 38	25 33	9 42
30	9	33	42
	38		
35		38	
	33		30
28		29	23
18	42	17	2
23	23	24	21
22	31	24	14
16	8	16	21
19	43	21	2
25	4	19	42
14	21	17	6
12	27	11	4
16	15	16	18
17	6	19	23
17	32	13	10
12	15	15	7
13	30	12	2
14	3	12	23
12	14	11	11
13	5	12	19
16	1	12	29
2	2	2	1

Which Group Will Make You Safe and Financially Secure?





	All Voters	Democrats	Independents	Republicans
Virginia				
Democrats	30	70	16	1
Republicans	38	2	31	85
Neither one	25	22	41	11
Not sure	7	7	12	3
Ohio				
Democrats	27	68	15	0
Republicans	43	3	34	85
Neither one	25	24	40	11
Not sure	6	5	11	4
Montana				
Democrats	24	71	16	0
Republicans	44	2	32	84
Neither one	26	24	42	13
Not sure	6	4	11	2

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





	All Voters	Democrats	Independents	Republicans
Virginia				
Support	31	45	27	20
Oppose	48	33	51	61
Not sure	21	21	22	18
Ohio				
Support	27	36	22	23
Oppose	51	41	49	61
Not sure	22	23	29	16
Montana				
Support	29	43	29	20
Oppose	52	34	49	67
Not sure	19	23	22	13

How Much Do You Think the Following Will Impact You?





% Impact "A Lot" + "Some"

	Virginia	Ohio	Montana
The recent 30 cent per gallon increase in the price of gas	83	86	89
The Federal Reserve increasing interest rates that make it harder for you to pay your credit card bills or get a loan	67	69	66
The US government possibly shutting down in October in a dispute over the federal budget	59	56	55
The increase of home mortgage interest rates to 7%	48	44	49
The restart of monthly student loans payments this fall	28	29	27

Concern about Being Able to Afford This Fall and Winter





% Concerned

	Virginia	Ohio	Montana
An unexpected \$1,000 cost	78	79	81
Groceries	71	74	76
Utility bills	64	71	70
Payments for other types of loans/debt	62	61	61
Prescription medications	53	55	58
Rent or mortgage payments		50	54
An unexpected \$100 cost	48	50	54
Car payments		39	39





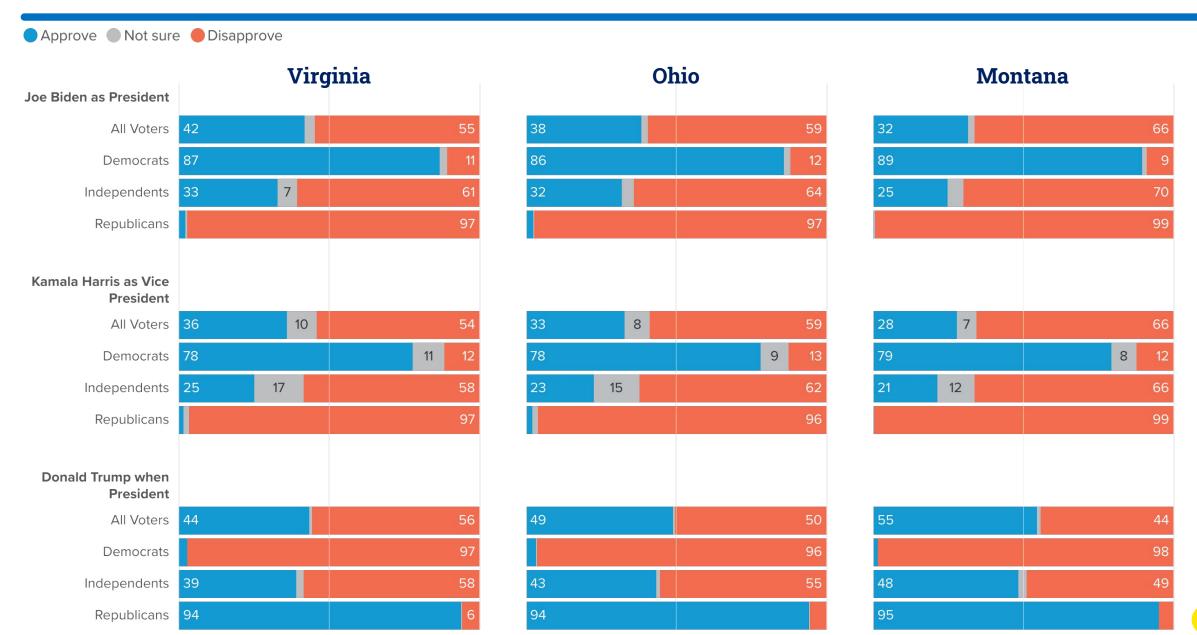
Job Approval of Public Figures

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





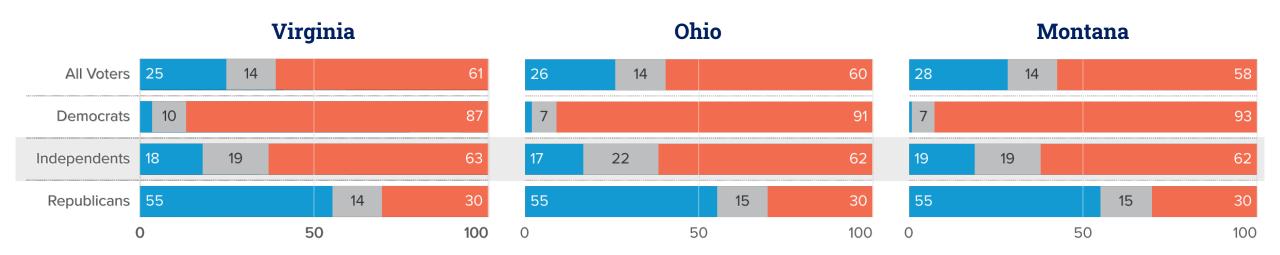


McCarthy/House GOP Job in Improving Your Life







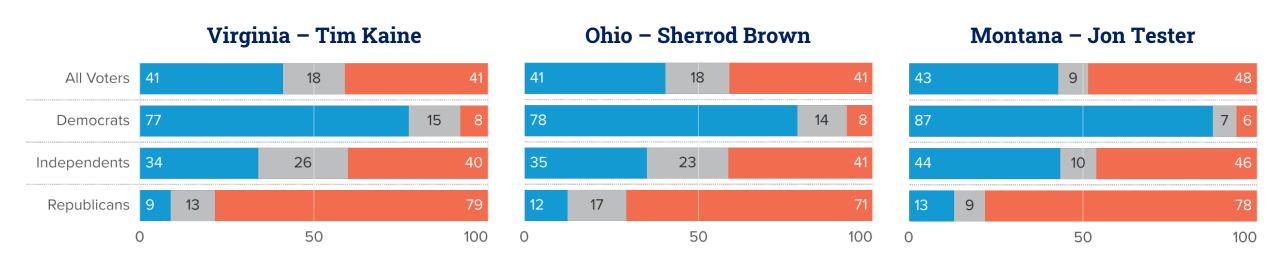


US Senate Job Approval





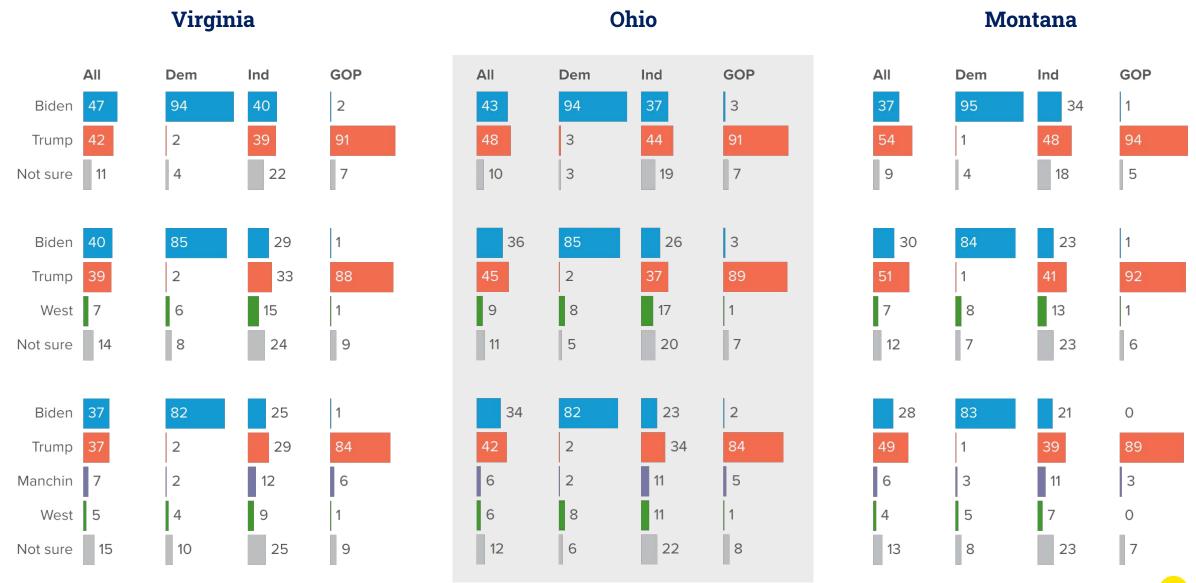




Current Presidential Vote Preference



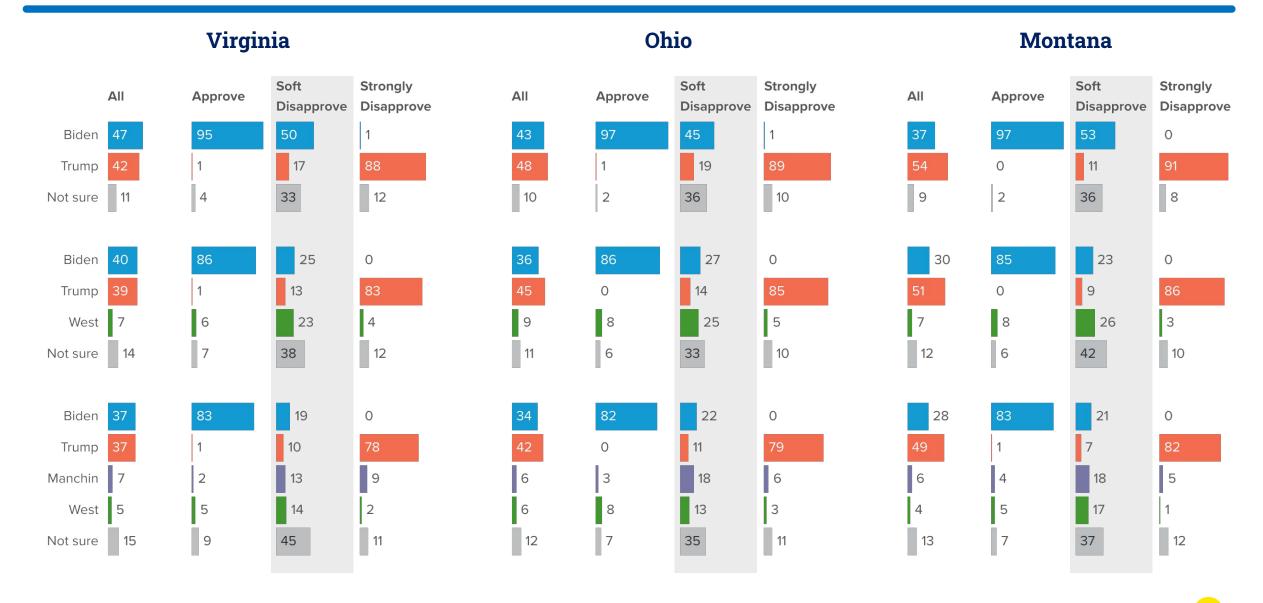




Current Presidential Vote Preference by Biden Approval





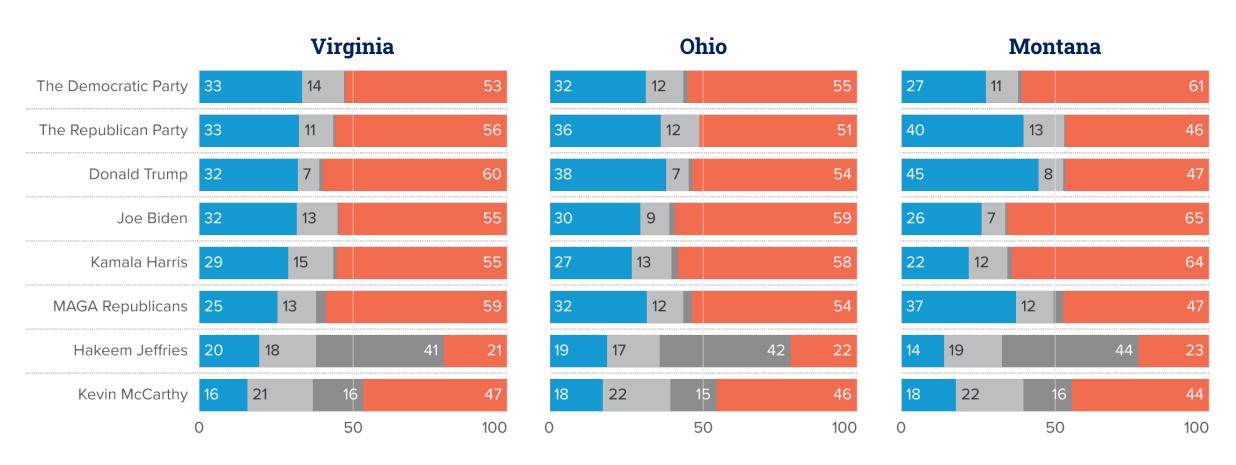


Personal Popularity Ratings – All Voters







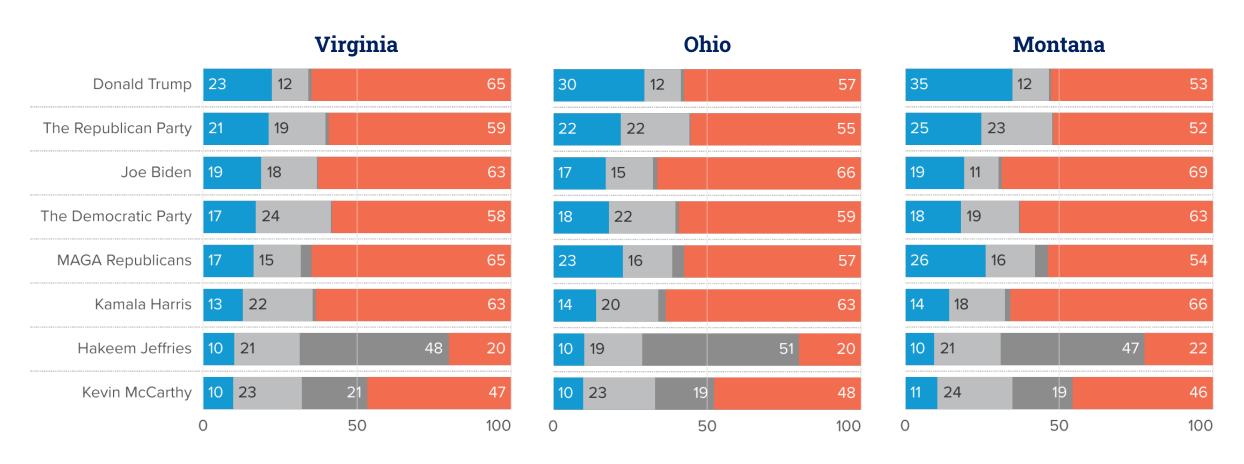


Personal Popularity Ratings – Independents













Financial Freedom

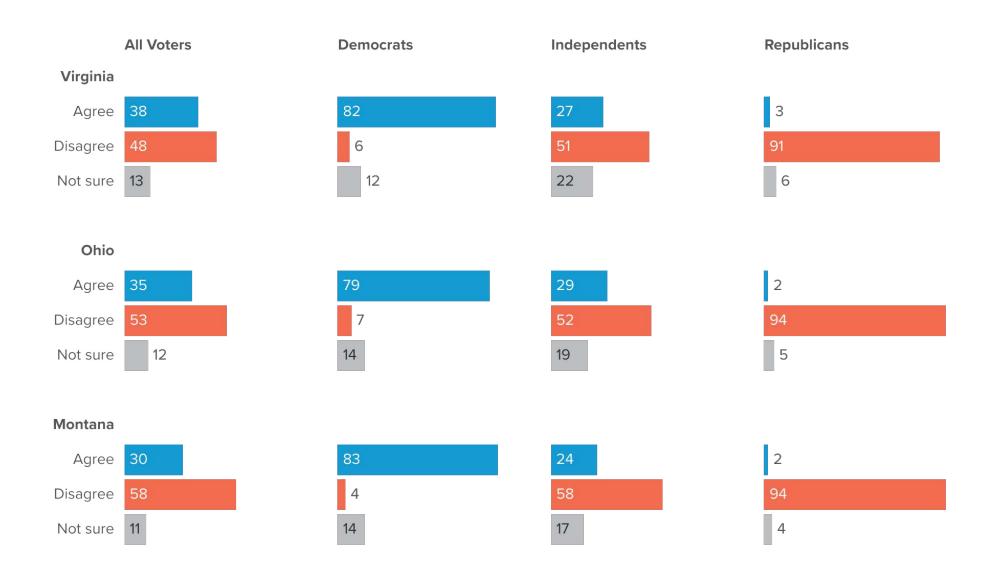
Voters in Montana, Ohio, and Virginia support an agenda focused on Financial Freedom over a namesake agenda like Bidenomics

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."

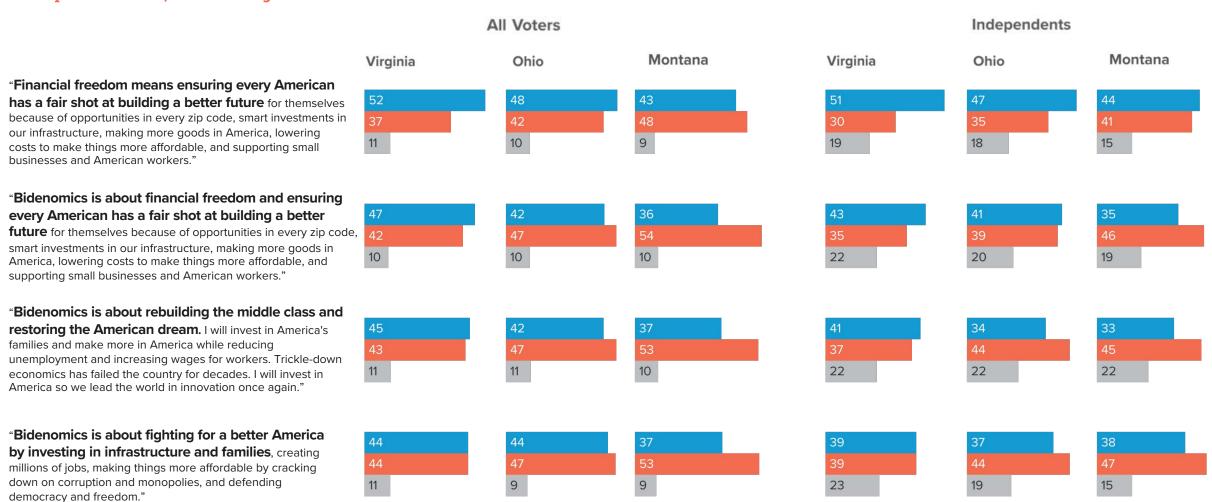


Support for Messages





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."

	All Voters		III Voters Indep		ndepende	ependents	
	Virginia	Ohio	Montana	Virginia	Ohio	Montana	
"Financial freedom means ensuring every American has a fair shot		Net Cho	oose Financial Freedom	/Bidenomics over MA	GA Message		
at building a better future for themselves because of opportunities in every zip code, smart investments in our infrastructure, making more goods in America, lowering costs to make things more affordable, and supporting small businesses and American workers."	15	6	-5	21	12	3	
"Bidenomics is about financial freedom and ensuring every American has a fair shot at building a better future for themselves because of opportunities in every zip code, smart investments in our infrastructure, making more goods in America, lowering costs to make things more affordable, and supporting small businesses and American workers."	5	-5	-18	8	2	-11	
"Bidenomics is about rebuilding the middle class and restoring the American dream. I will invest in America's families and make more in America while reducing unemployment and increasing wages for workers. Trickle-down economics has failed the country for decades. I will invest in America so we lead the world in innovation once again."	2	-5	-16	4		-12	
"Bidenomics is about fighting for a better America by investing in infrastructure and families, creating millions of jobs, making things more affordable by cracking down on corruption and monopolies, and defending democracy and freedom."	0	-3	-16	0	-7	-9	

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

Issues Offer Opportunities for Values Messaging





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

Individual Freedom Frame

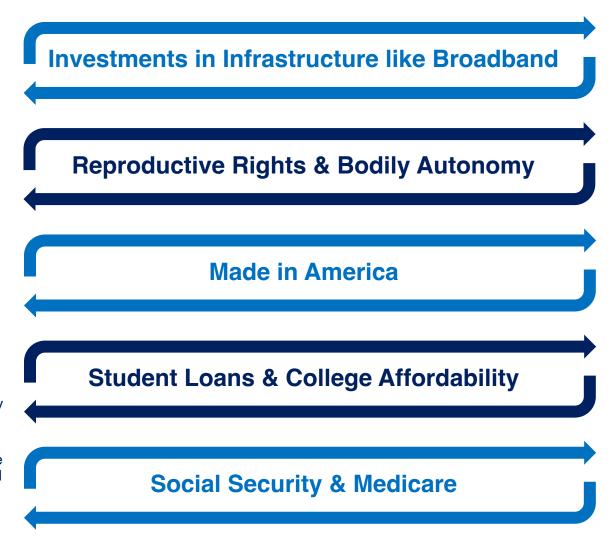
"Investing in broadband enhances Americans' individual freedoms by creating a catalyst so that every citizen has opportunities for growth, education, civic discourse, and the ability to pursue their passions without limitation."

"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."

"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."

"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."

"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."



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."





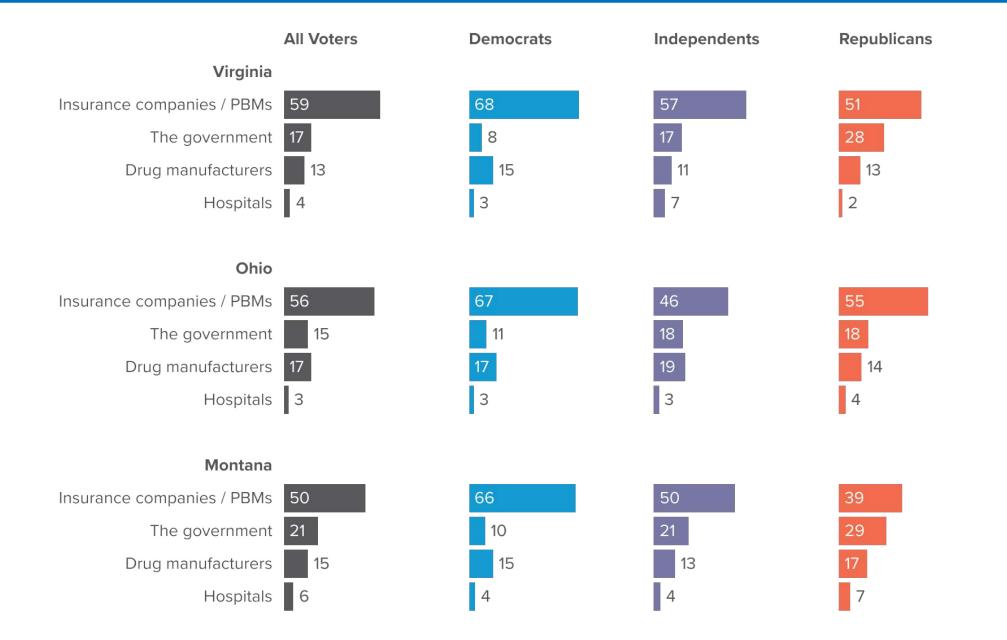
Opportunities to Deliver on Lowering Healthcare Costs

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?





	All Voters	Democrats	Independents	Republicans
Virginia				
Joe Biden and Democrats in Congress	45	83	41	5
Insulin manufacturers	27	12	30	41
Republicans in Congress	13	1	7	32
None of them - this shouldn't be the law	16	4	22	23
Ohio				
Joe Biden and Democrats in Congress	40	82	37	7
Insulin manufacturers	29	14	31	40
Republicans in Congress	14	1	11	30
None of them - this shouldn't be the law	16	3	21	23
Montana				
Joe Biden and Democrats in Congress	37	86	36	3
Insulin manufacturers	27	11	29	35
Republicans in Congress	18	1	14	35
None of them - this shouldn't be the law	18	3	20	26

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





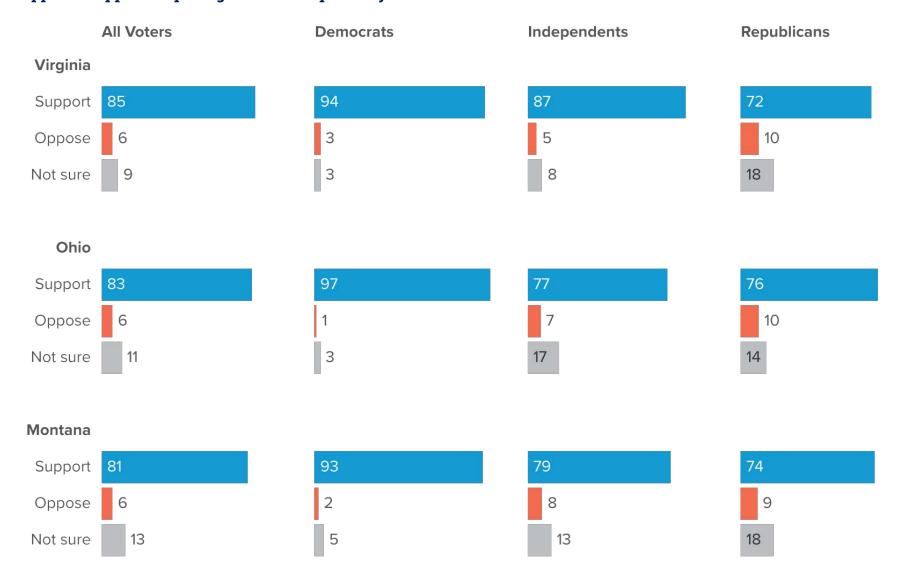
	Virginia	Ohio	Montana
Holding insurance companies and pharmacy benefit managers accountable through reforms	66	62	64
Capping the costs of specific, life-saving drugs	66	64	60
Requiring hospitals and treatment centers to disclose the costs up front at the time of treatment	59	55	57
Requiring health insurance companies to disclose costs up front	59	56	53
Incentivizing drug manufacturers to make more products entirely in the USA to protect us from future supply chain issues	49	46	45
The government should not prioritize any of these	8	8	10

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?"

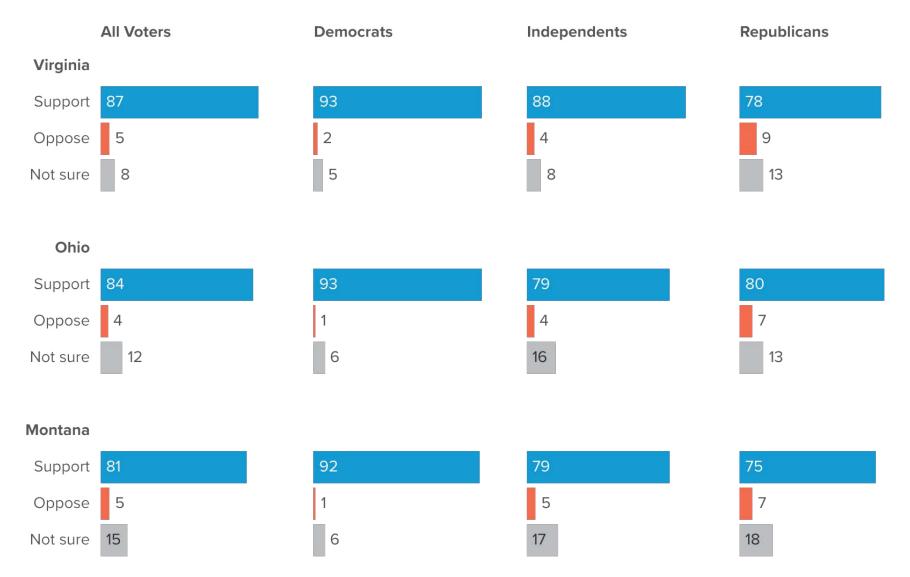


Support for the Patient Act of 2023





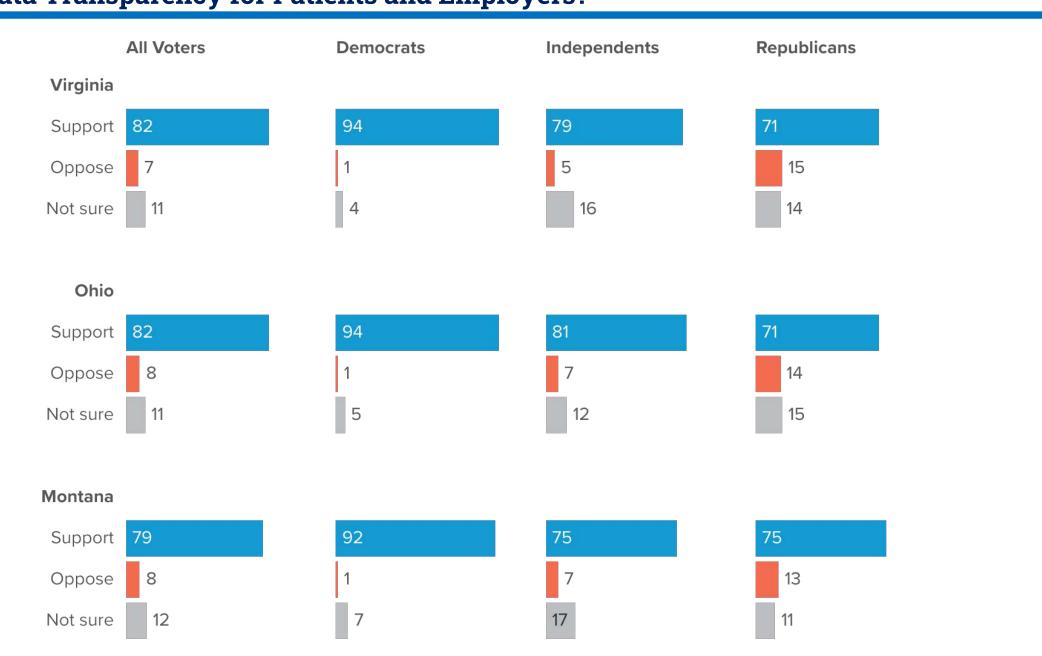
"The Patient Act of 2023 requires hospitals and insurance companies to publicly post procedure prices, including all negotiated rates, for doctor and hospital services. It bolsters federal hospital and health insurance price transparency rules that historically have been plagued by a lack of compliance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



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



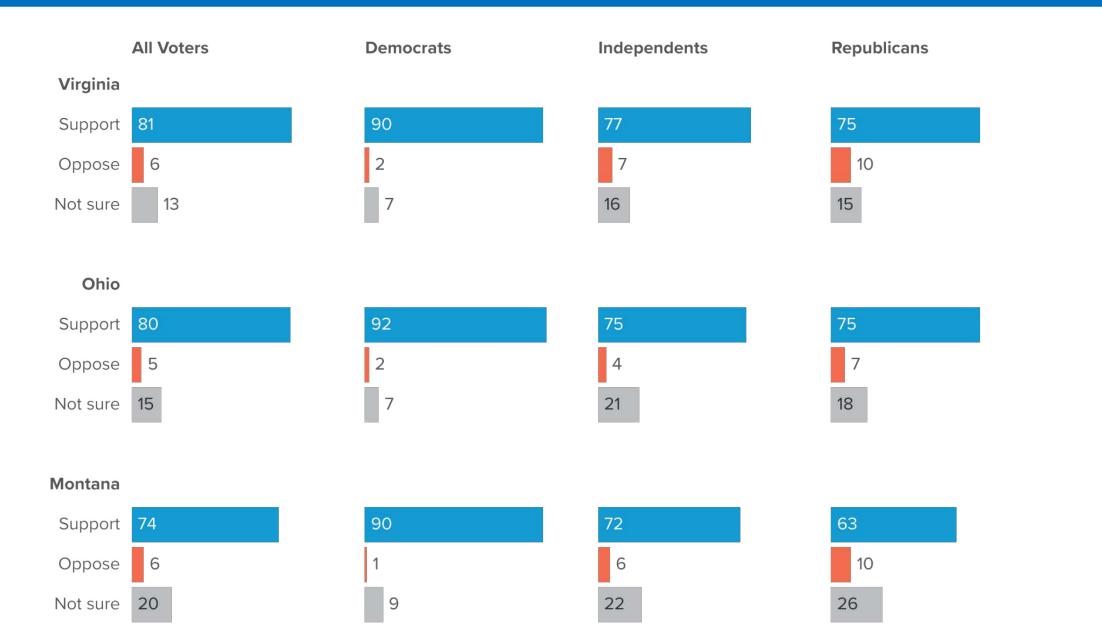




Support for Requiring Health Insurance Plans to Evaluate the Outcomes of Their Coverage



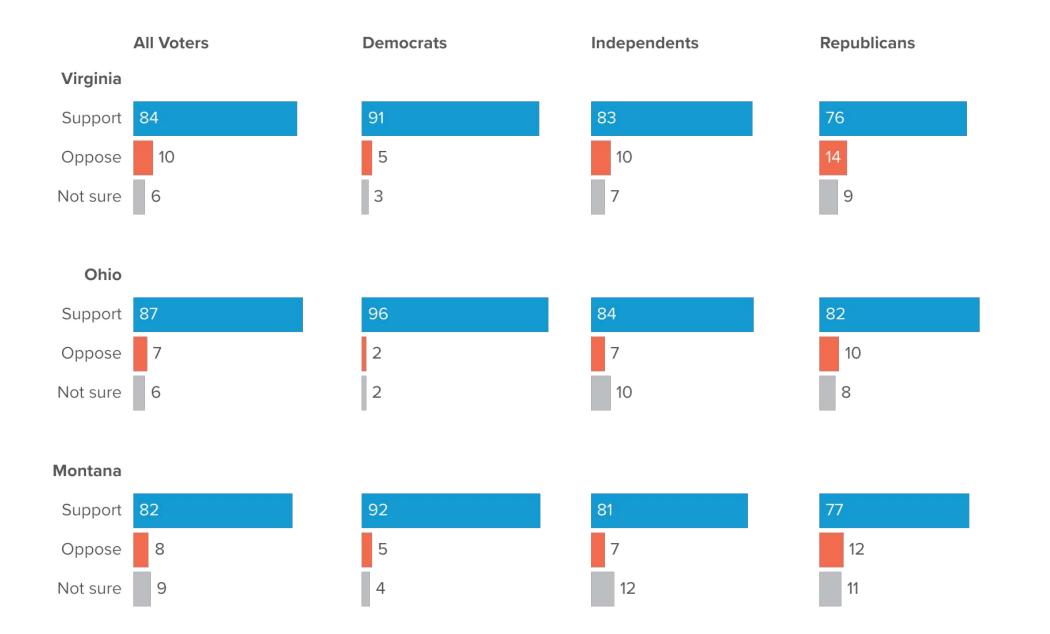




Support for Stopping Insurers from Charging up to 24x More than Generic Medicines





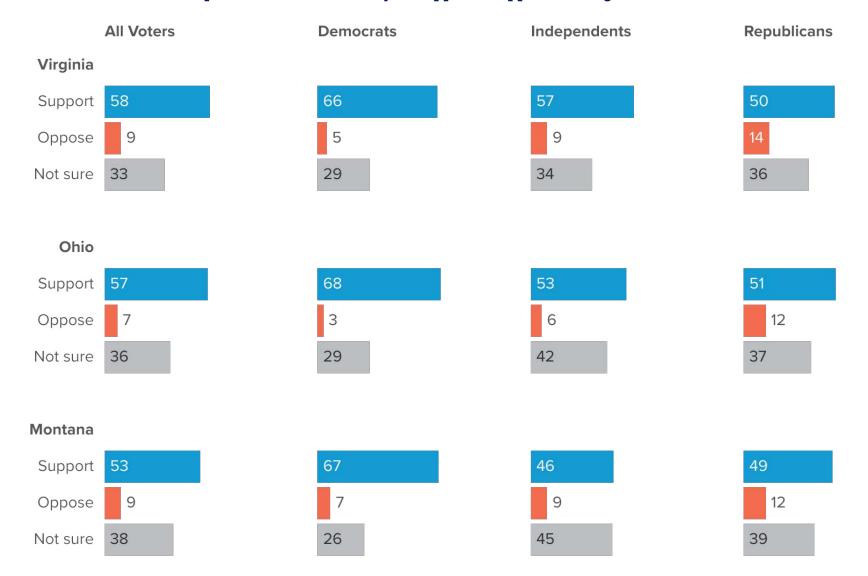


Support for the Healthy Competition for Better Care Act





"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?"

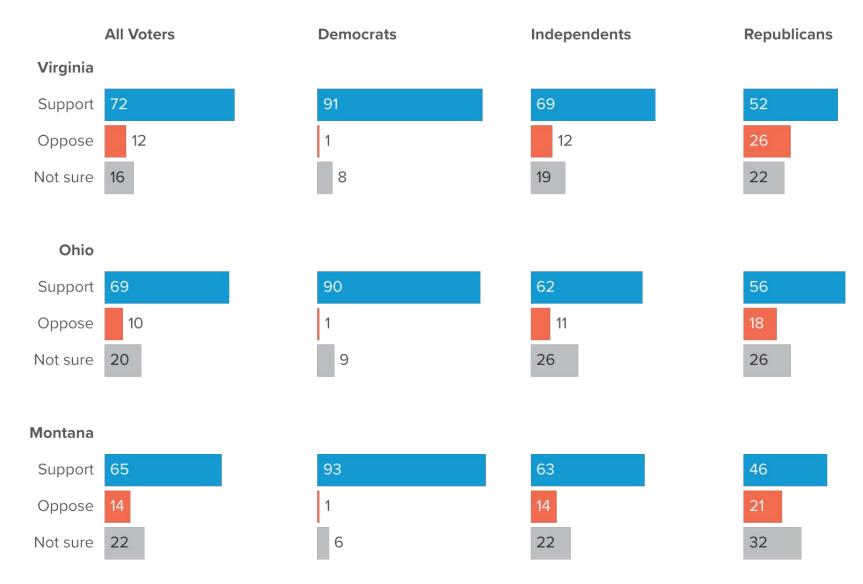


Support for the Behavioral Health Crisis Care Centers Act





"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?



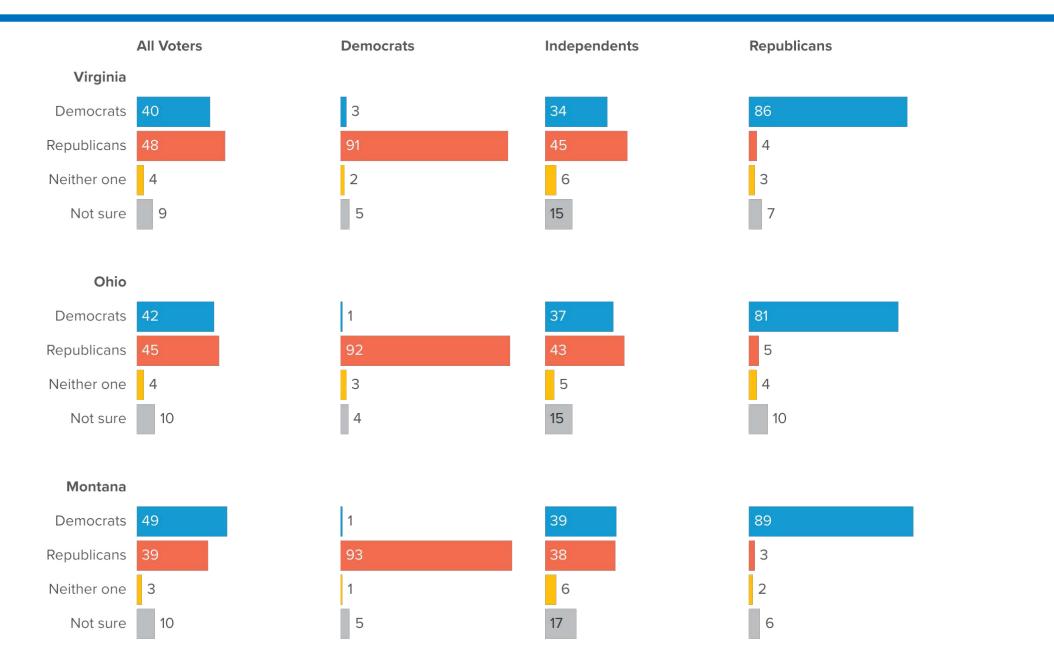


	All Voters	Democrats	Independents	Republicans
Virginia				
Democrats	40	84	30	1
Republicans	38	2	29	86
Neither one	19	13	33	11
Not sure	4	1	9	2
Ohio				
Democrats	35	83	26	1
Republicans	40	3	26	84
Neither one	21	11	41	13
Not sure	4	3	7	3
Montana				
Democrats	29	88	18	0
Republicans	46	1	36	85
Neither one	21	10	38	13
Not sure	4	1	9	2

Which Group Has More Extremists?



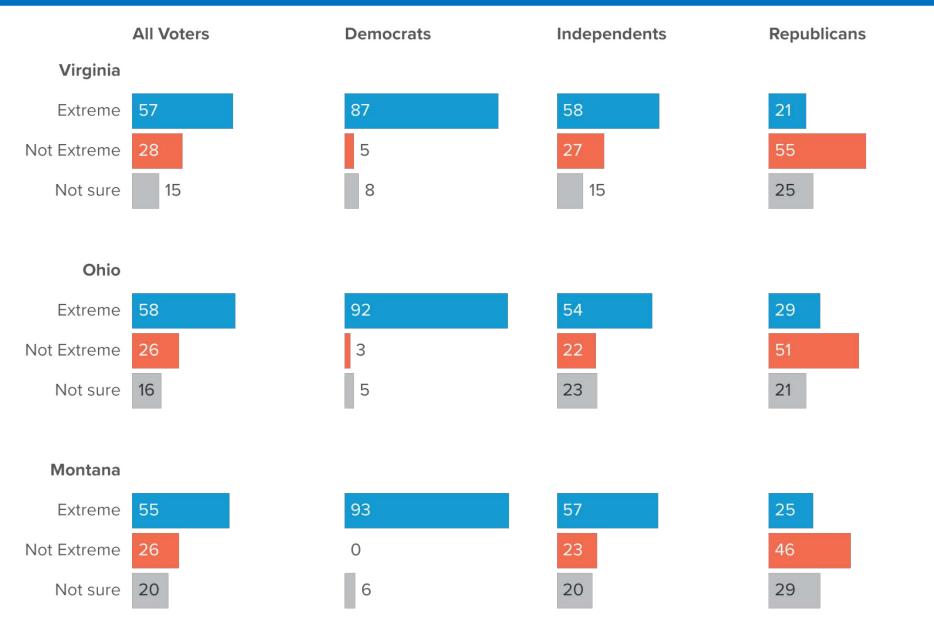




How Extreme is the Circuit Court of Appeals Ruling Limiting Access to Mifepristone*?







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Voter Trends in Media Consumption

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

Trust in Media





	All Voters	Democrats	Independents	Republicans
Virginia				
Trust	37	65	30	11
Do Not Trust	63	35	70	89
Ohio				
Trust	33	65	25	11
Do Not Trust	67	35	75	89
Montana				
Trust	29	67	23	8
Do Not Trust	71	33	77	92

Media Sources Consumed





	Virginia	Ohio	Montana
Local TV News	55	56	51
Online news sites	44	43	37
Facebook	35	34	35
Local newspapers	31	35	37
Network TV news	31	33	27
CNN	27	22	16
National newspapers	27	20	17
Radio news	24	28	25
MSNBC	24	21	17
Fox News	22	24	21
YouTube	18	16	18
Podcasts	18	19	23
Twitter	13	10	8
Talk Radio	13	16	17
Newsmax	11	11	15
Instagram	10	9	9
TikTok	10	10	9
Magazines	7	6	5
OANN	6	5	6
Joe Rogan	4	5	8
Snapchat	2	1	2
Telegram	1	1	2
Whatsapp	1	0	0

Media Sources Consumed





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

Ohio

All	Dem	Ind	GOP
56	63	52	54
43	46	48	35
34	34	33	36
35	43	32	31
33	46	27	26
22	40	17	9
20	33	17	10
28	29	31	25
21	41	14	8
24	6	18	47
16	13	21	16
19	20	21	17
10	10	11	8
16	7	16	25
11	2	10	21
9	10	9	7
10	13	11	7
6	8	4	5
5	0	5	9
5	0	6	9
1	1	2	1
1	0	1	2
0	0	0	0

Montana

All	Dem	Ind	GOP
51	56	48	51
37	42	41	31
35	35	34	36
37	43	41	29
27	41	28	16
16	32	16	4
17	31	18	5
25	25	26	24
17	31	18	4
21	3	15	41
18	13	23	17
23	25	20	24
8	7	9	8
17	6	17	24
15	1	11	28
9	11	7	8
9	11	10	7
5	7	6	4
6	0	4	11
8	0	8	14
2	2	3	2
2	0	4	3
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.

