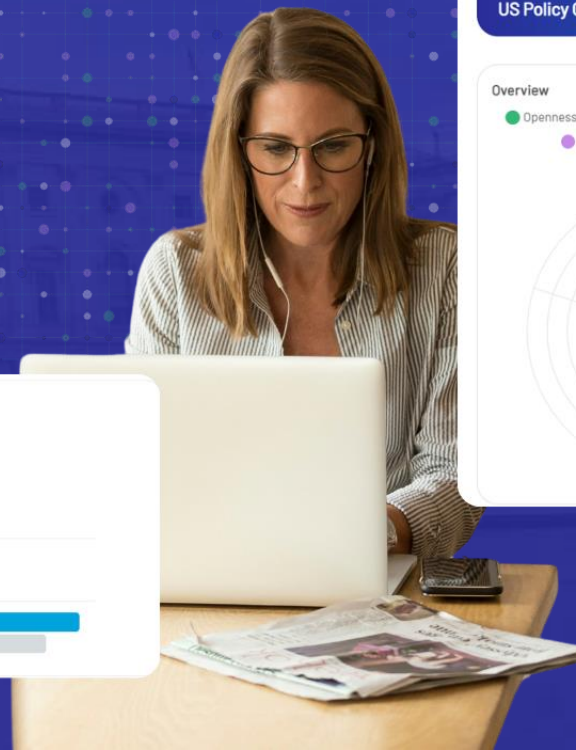


Q1 2025 REPORT

# U.S. Policy Opinion Makers

FOR COMMUNICATIONS & PUBLIC AFFAIRS LEADERS



### Psychographics Traits

Audience: US Policy Opinion Makers

Overview

- Openness
- Conscientiousness
- Extraversion
- Agreeableness
- Neuroticism

### Education

This audience has strong opinions about 6 of 8 issues

TOP 3 ISSUES

Legend: This Audience (Blue), General Population (Grey)

Issue	This Audience	General Population
Supports Universal Healthcare	26%	17%
Supports Lower Drug Prices	16%	9%
High Vaccine Trust	92%	82%

# Methodology

This survey was fielded March 10-14, 2025.

Tunnl conducted this quarterly survey among 1,000 members of the U.S. Policy Opinion Makers audience. The margin of error is +/- 4% at a 95% confidence level.

1

## Sample

our influential audience of U.S. Policy Opinion Makers

2

## Survey

them about their evolving attitudes on key topics

3

## Produce

results weighed and reviewed for quality control

4

## Explore

insights to demonstrate opportunities

5

## Track

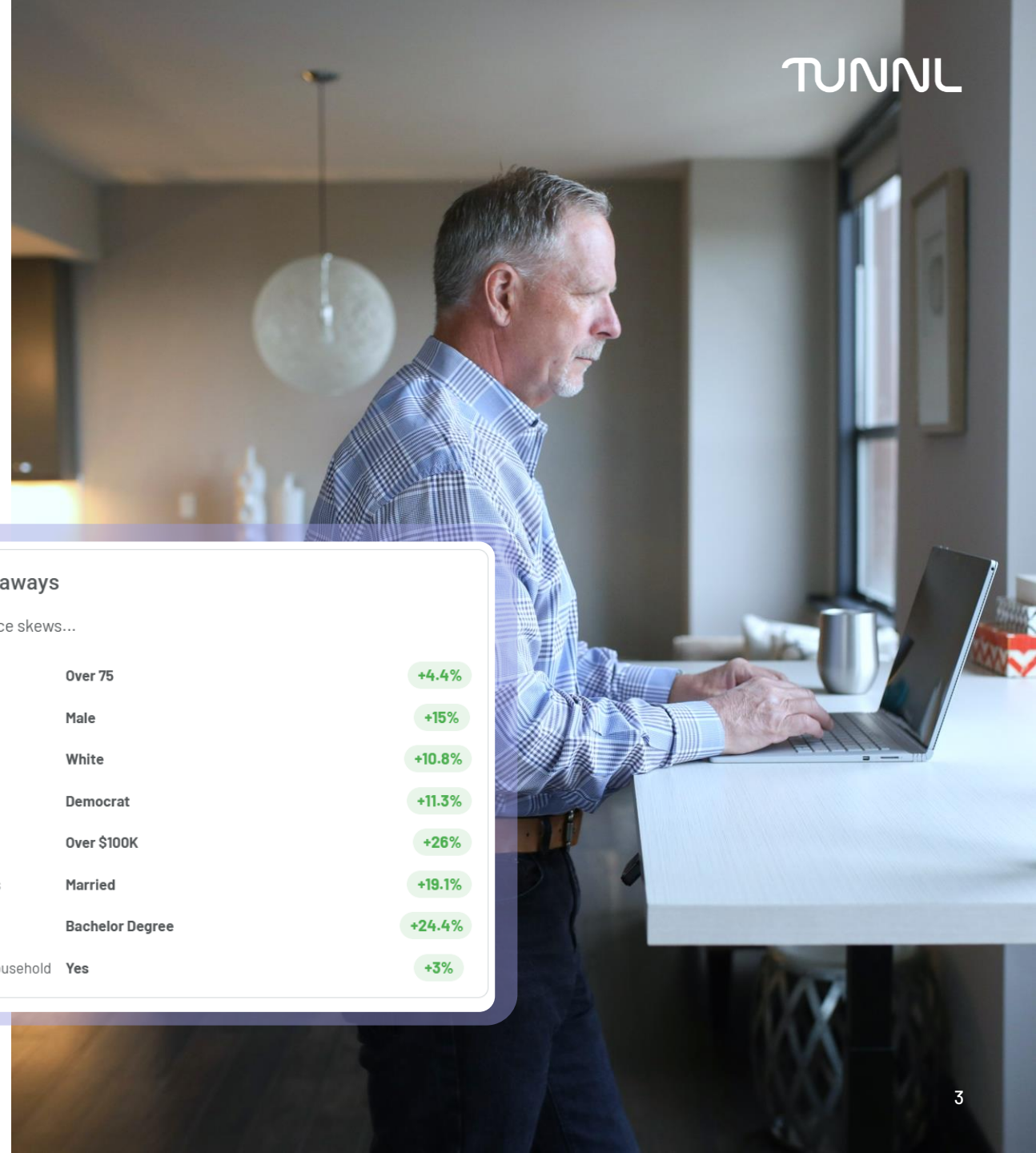
trends and movement over time

WHO ARE THE

## U.S. Policy Opinion Makers

Tunnl’s audience of 1.6 million U.S. Policy Opinion Makers consists of political and business leaders who work in Congress, the Executive Branch, news media, lobbying, law firms, and more.

**Leverage this audience through the Tunnl Platform today.**



### Key Takeaways

This audience skews...

Age	<b>Over 75</b>	<b>+4.4%</b>
Sex	<b>Male</b>	<b>+15%</b>
Race	<b>White</b>	<b>+10.8%</b>
Party	<b>Democrat</b>	<b>+11.3%</b>
Income	<b>Over \$100K</b>	<b>+26%</b>
Marital Status	<b>Married</b>	<b>+19.1%</b>
Education	<b>Bachelor Degree</b>	<b>+24.4%</b>
Children in Household	<b>Yes</b>	<b>+3%</b>

# OUTLOOK

U.S. Policy Opinion Makers continue to be in disarray. There is tension between their economic optimism and their views on social issues.

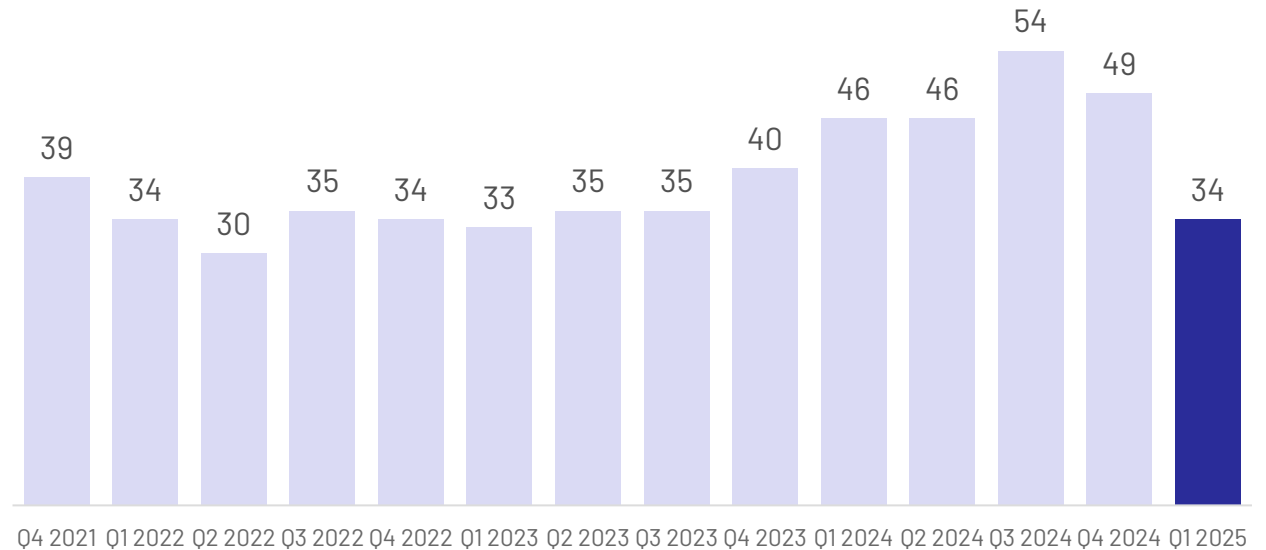
Using perceptions of interest rates, the stock market, unemployment, civil dialogue, race relations, and world safety, Tunnl has created an Opinion Makers ' Outlook Index Score.

This Outlook measures optimism up to 100 to reflect perceptions regarding the current direction the United States is heading.

**Having dropped 15 points, the Index Score is near all time lows.**

## U.S. Policy Opinion Makers Outlook

# 34



# HIGHLIGHTS ON WHAT'S CHANGED SINCE DECEMBER

It's been just over 75 days since Tunnl's Q4 2024 reporting on views from the U.S. Policy Opinion Makers. Here's a rundown of things that might have influenced changes ahead in the report:

- **New administration has taken office** – The new U.S. presidential administration has begun, shaping policy directions and setting executive priorities
- **Legislative battles begin** – The new Congress debates key policy initiatives including tax reform, healthcare adjustments, and economic stimulus efforts
- **Ongoing global conflicts** – Continued instability in Eastern Europe and the Middle East, with diplomatic and military responses from global leaders
- **Economic shifts** – Stock market reactions to new policies, Federal Reserve decisions on interest rates, and consumer spending trends post-holiday season
- **Supreme Court cases** – High-profile legal cases with potential long-term policy implications



## Declining Stock Market

Financial optimism is declining, and many think the Stock Market will go down.



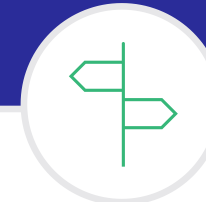
## Stability and Safety

Optimism around world safety and political dialogue has decreased slightly but have remained relatively consistent.



## Inflation and Interest Rates

The percentage of U.S. Policy Opinion Makers who believe inflation will rise is at a two-year high.



## Partisan Splits

There are clear divides on new reform efforts by the administration, but we're still seeing GOP enthusiasm and support.

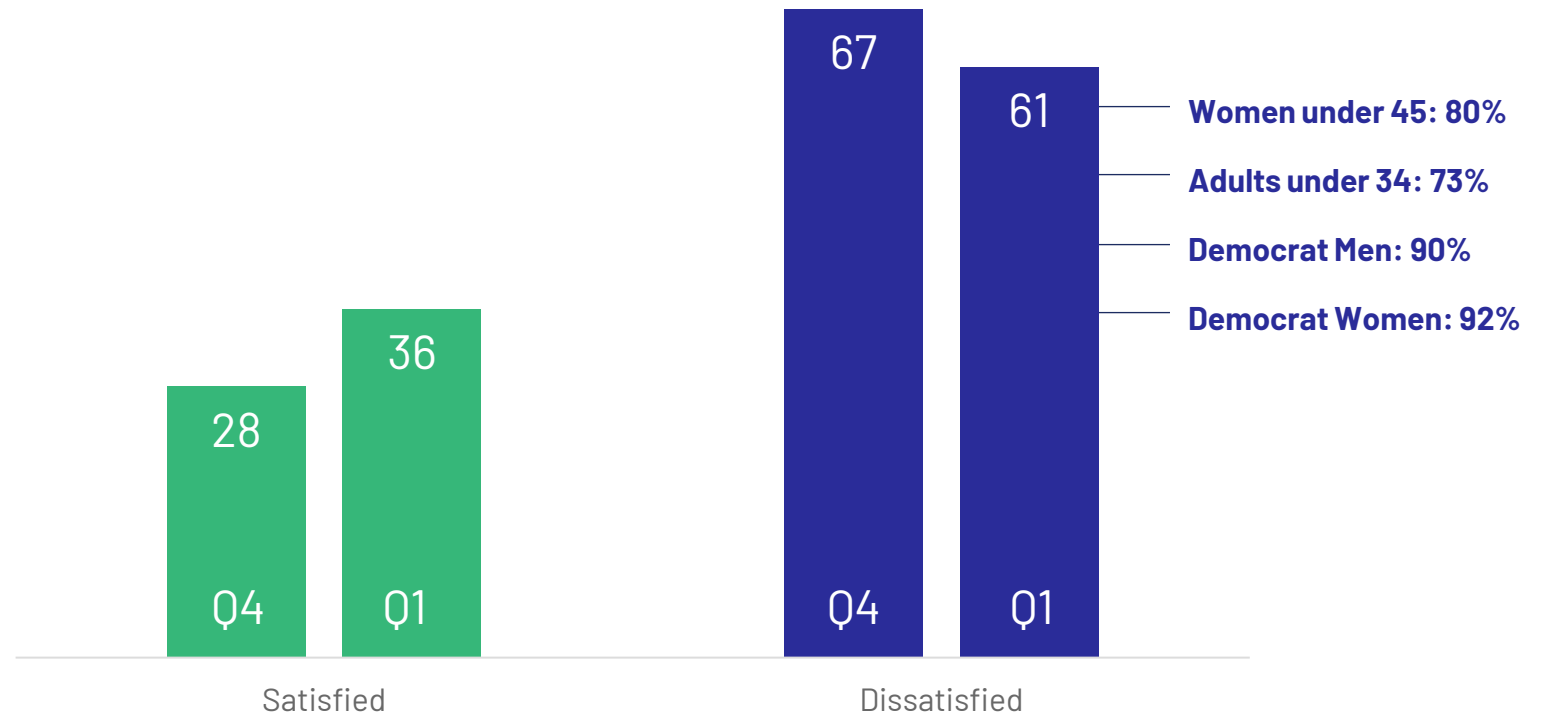
INSIGHTS ON

# U.S. DIRECTION

U.S. Policy Opinion Makers are slightly more satisfied with the way that things are going in the United States currently. However, they are still predominately dissatisfied with the direction of the country.

In December, 28% of Democrats were satisfied with the way things are going in the US. This number dropped to 7% in March.

## U.S. Policy Opinion Makers Satisfaction with Direction of Country



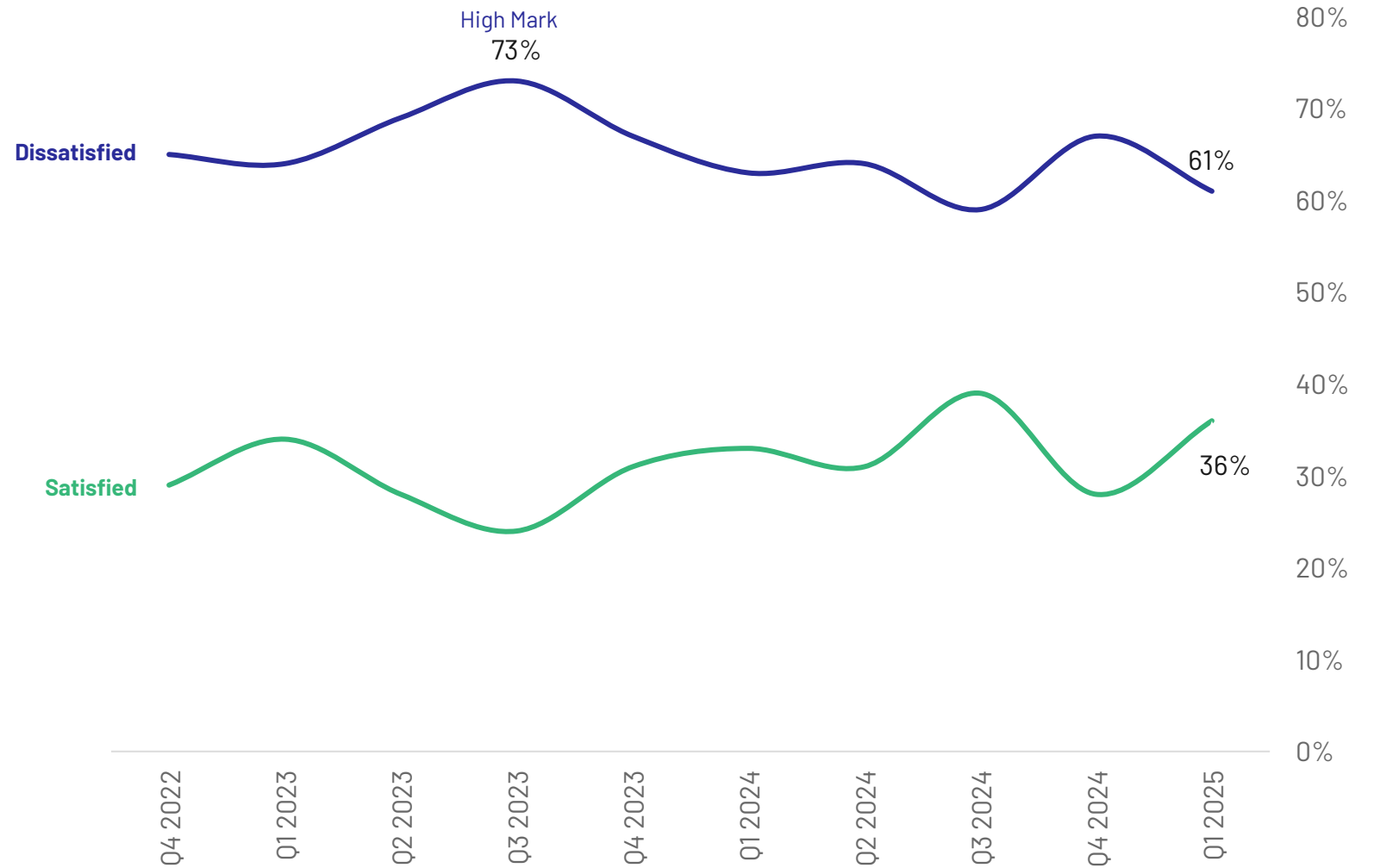
INSIGHTS ON

# U.S. DIRECTION

*U.S. Policy Opinion Makers are dissatisfied with the direction of the United States and where it is headed.*

In December, 60% of Democrats were dissatisfied with the way things are going in the US. This number jumped up to 91% in March.

## U.S. Policy Opinion Makers Satisfaction with Direction of Country Trended



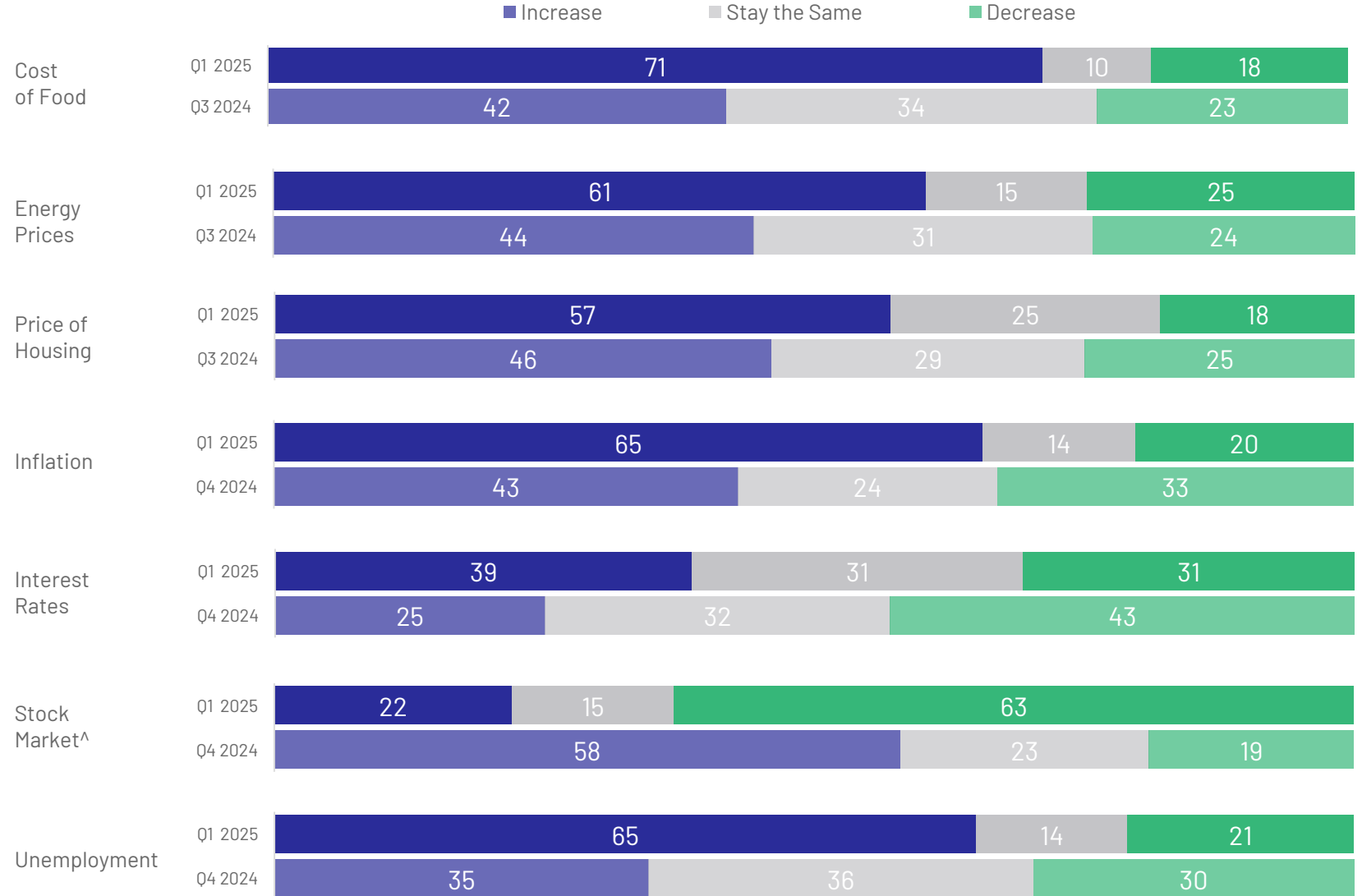
INSIGHTS ON

# FINANCE

*Tunnl asked U.S. Policy Opinion Makers about their perception of key financial indicators over the next six months.*

Perceptions of financial indicators have shifted since Q3 and Q4. There is a strong belief that the stock market will decline over the next 6 months. There are also growing concerns about inflation, interest rates, and unemployment.

## U.S. Policy Opinion Makers Perception of Financial Indicators



<sup>^</sup>The stock market numbers experienced a shift after the fed rate cut announcement with 55% post announcement saying there would be a market increase. All other financial indicators stayed relatively stable pre to post announcement.



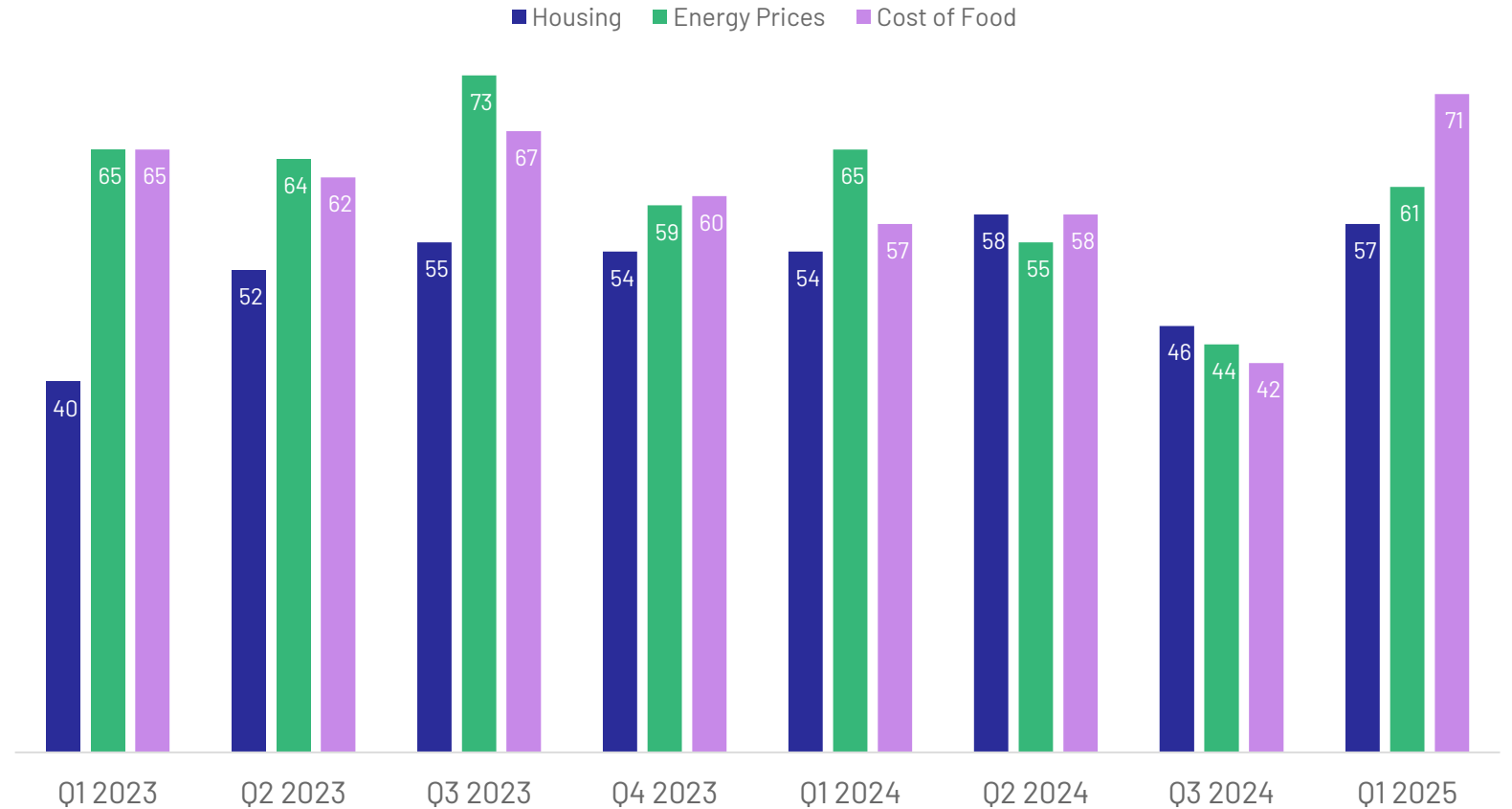
## INSIGHTS ON FINANCE

*Tunnl asked U.S. Policy Opinion Makers about their perception of key economic indicators over the next six months.*

Policy Opinion Makers (71%) expect an increase in the cost of food since last reported on in Q3 of 2024.

There has been a consistent opinion on housing since 2022 but there was an increase in the percentage of Policy Opinion Makers who think it will increase in the next 6 months (11%).

### U.S. Policy Opinion Makers Who Believe Financial Indicators Will Increase



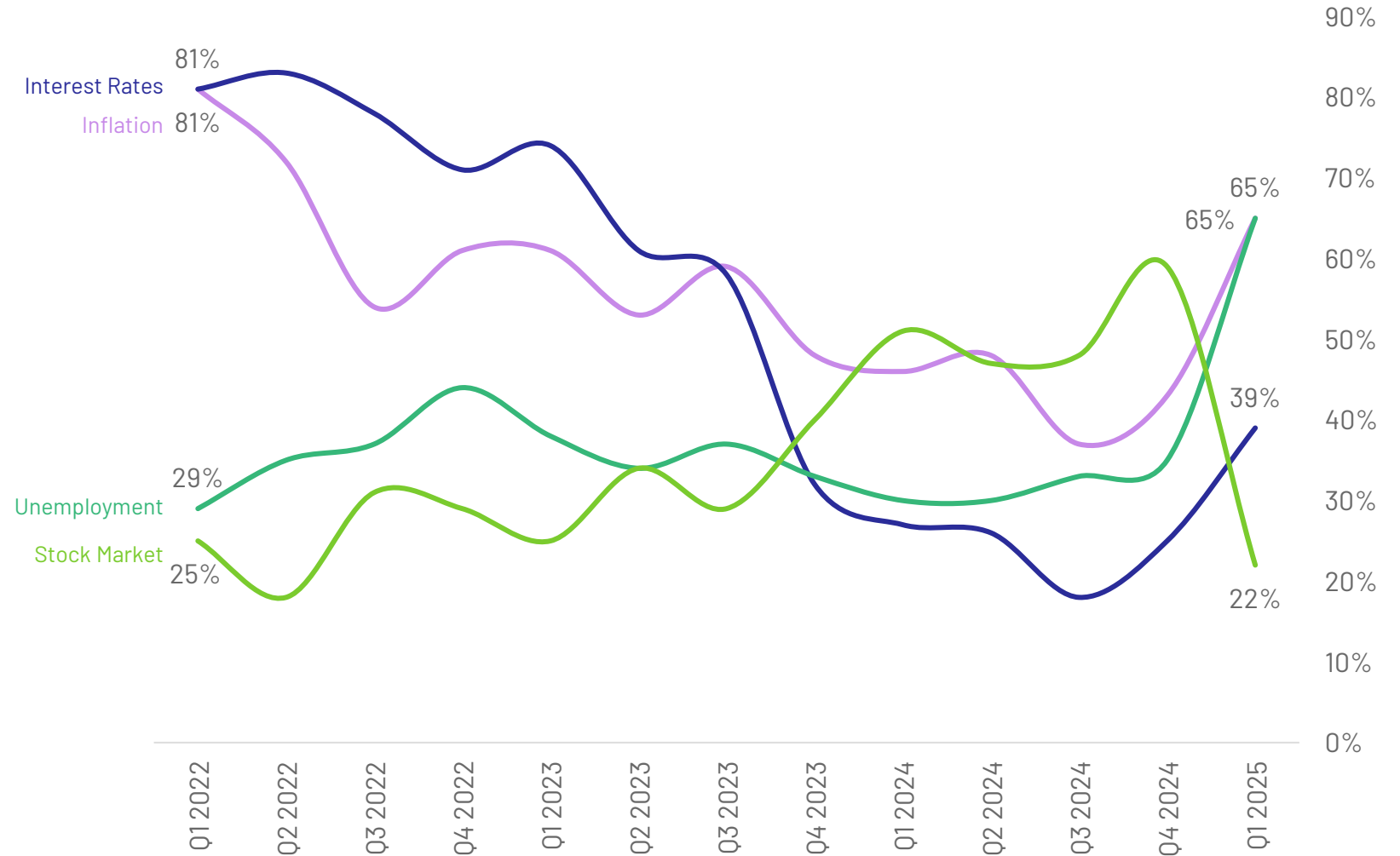
INSIGHTS ON  
**FINANCE**

*U.S. Policy Opinion Makers' perception of four key financial indicators has shifted in response to recent economic trends.*

Looking over our three-year trend, concerns about increased unemployment have jumped about 30% since the last quarter.

Confidence in the stock market had been growing until Q1. Only 22% of Policy Opinion Makers believed it would increase in the next six months.

**U.S. Policy Opinion Makers Who Believe Financial Indicators Will Increase**

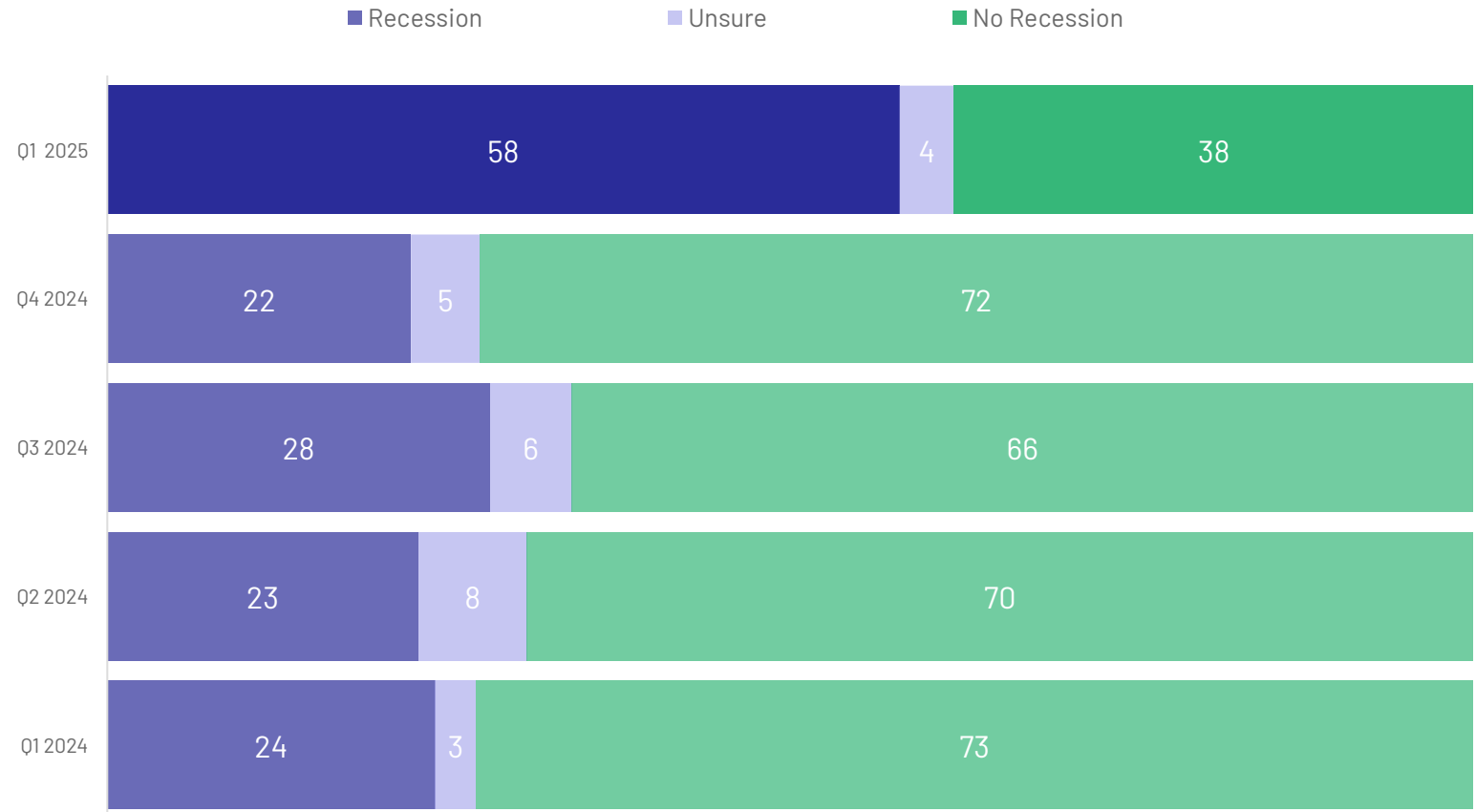


# INSIGHTS ON RECESSION

*U.S. Policy Opinion Makers' perception of potential for recession in the next six months.*

Pessimism extends for U.S. Policy Opinion Makers with a little over half (58%) believing the country is headed towards a recession in the next 6 months.

## U.S. Policy Opinion Makers Views on Potential for Recession

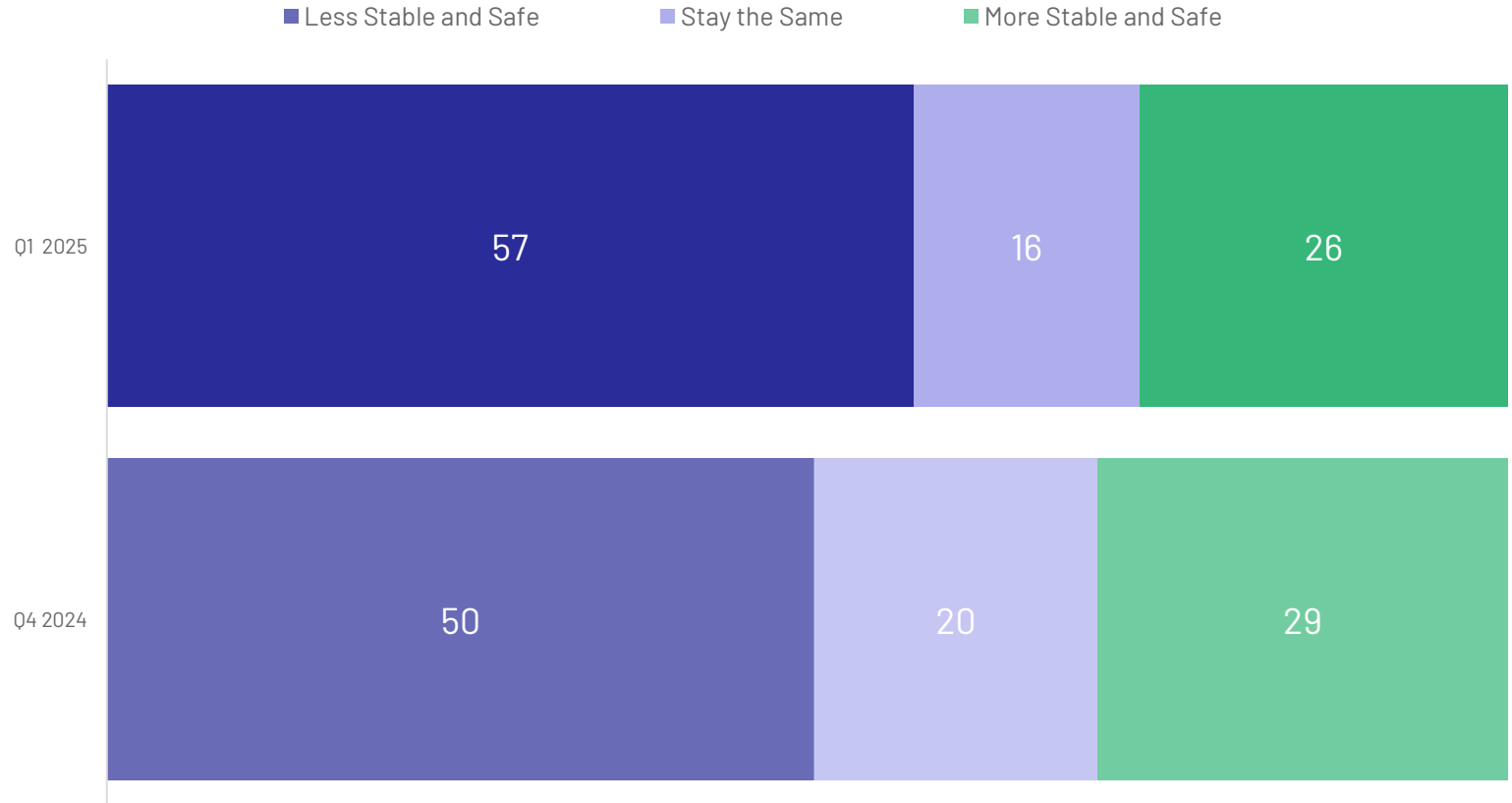


INSIGHTS ON  
**SAFETY**

World safety perceptions are in flux reflecting the dynamic nature of global conflict and major domestic issues.

U.S. Policy Opinion Makers believe conditions will become slightly worse. They are less decisive on stability this quarter, with more than half (57%) saying things will be less stable and safe.

**U.S. Policy Opinion Makers View on World Safety**



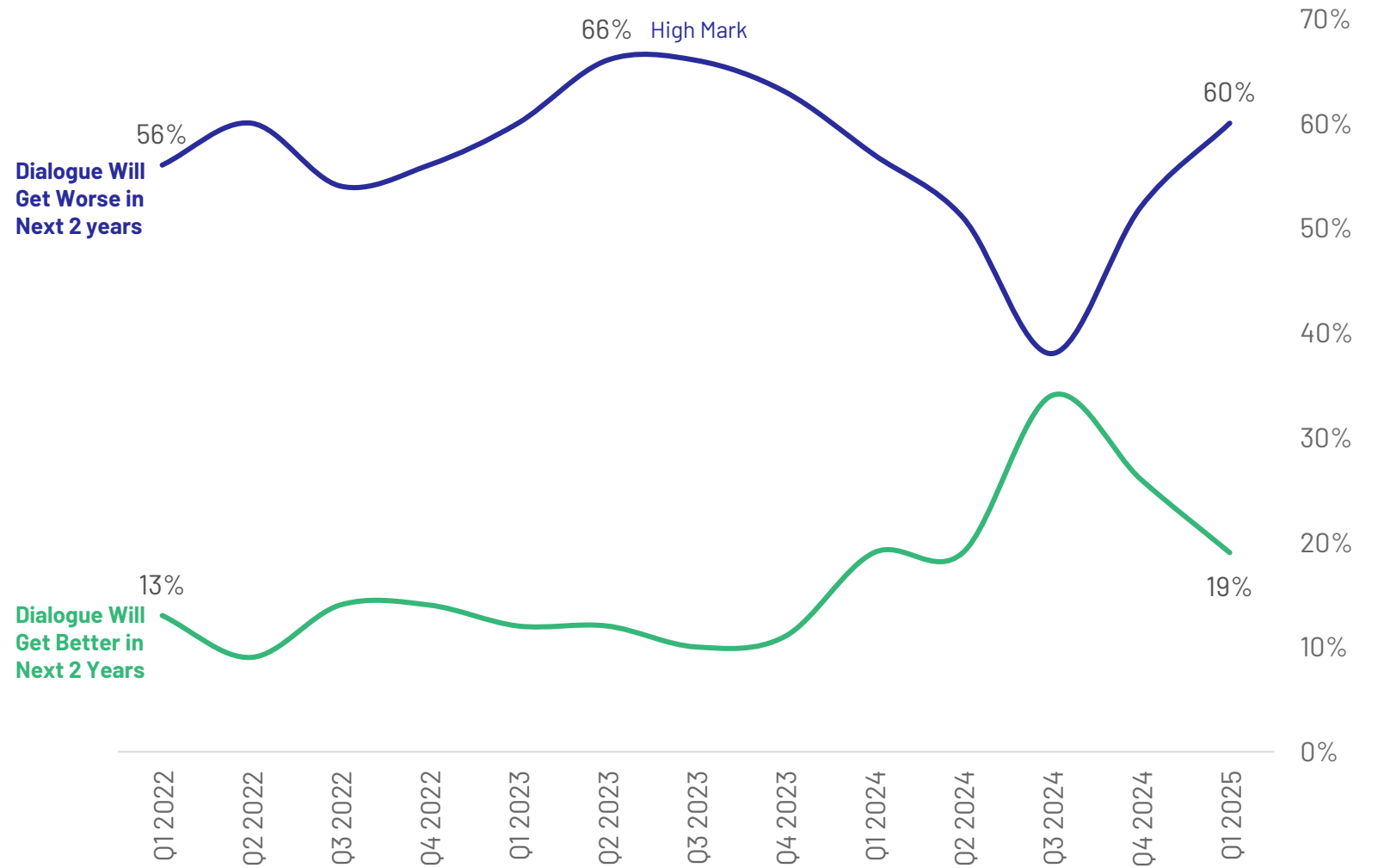
INSIGHTS ON

# DISCOURSE

U.S. Policy Opinion Makers were at a crossroads previously but have started to have more decisive perceptions of civil discourse in Q1.

More believe political and civil dialogue will get worse in the next two years.

## U.S. Policy Opinion Makers Futurecasting the State of Political and Civil Dialogue Trended



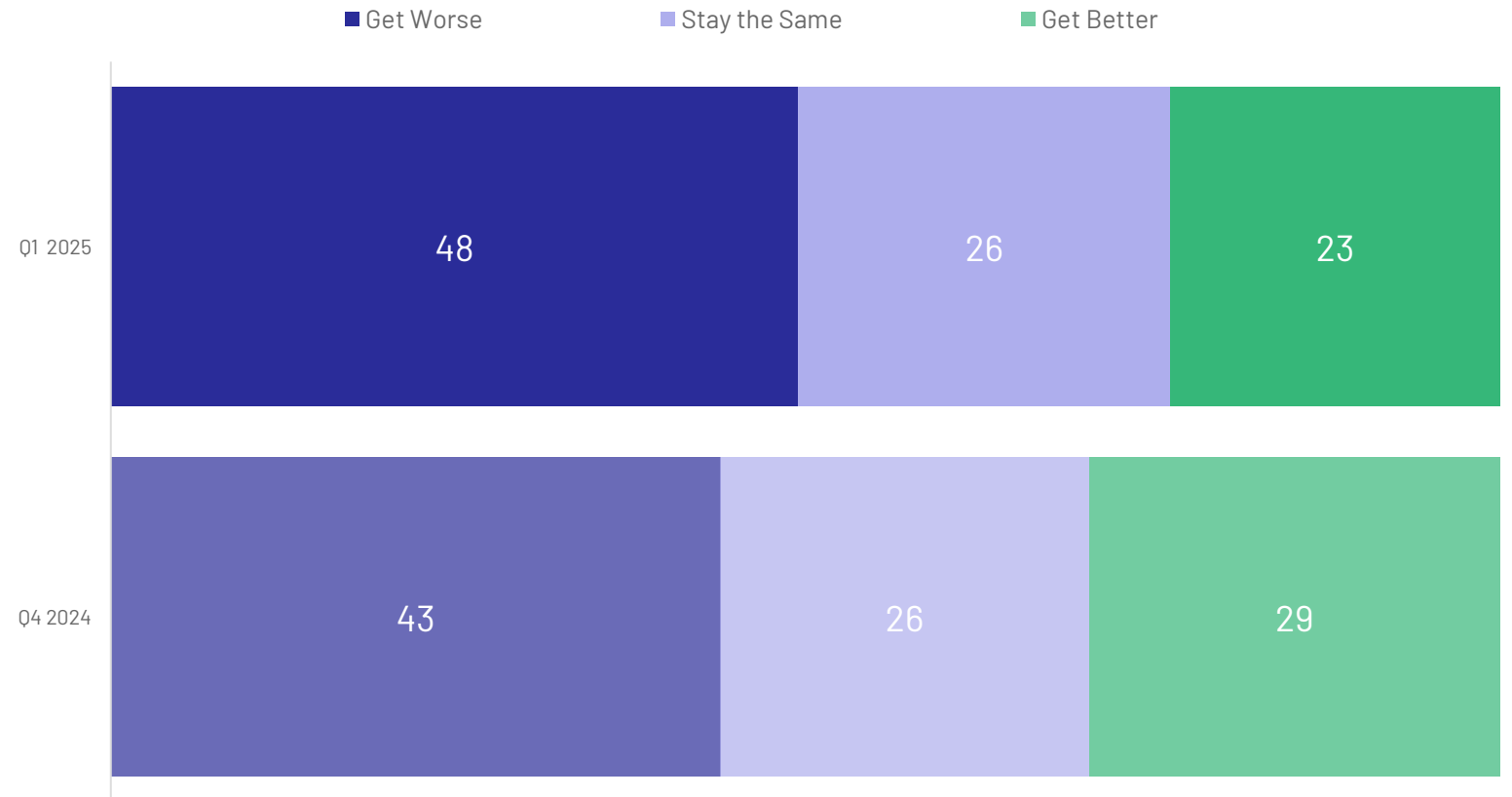
## INSIGHTS ON

# RACE RELATIONS

U.S. Policy Opinion Makers are divided on the future of race relations. While opinions remain split, there has been a notable rise in the share of those who believe race relations will worsen over the next two years, also in line with partisan leanings.

A majority of Democrats (73%) believe race relations will get worse over the next two years, compared to only 12% of Republicans.

## U.S. Policy Opinion Makers Views on the Future of Race Relations



INSIGHTS ON

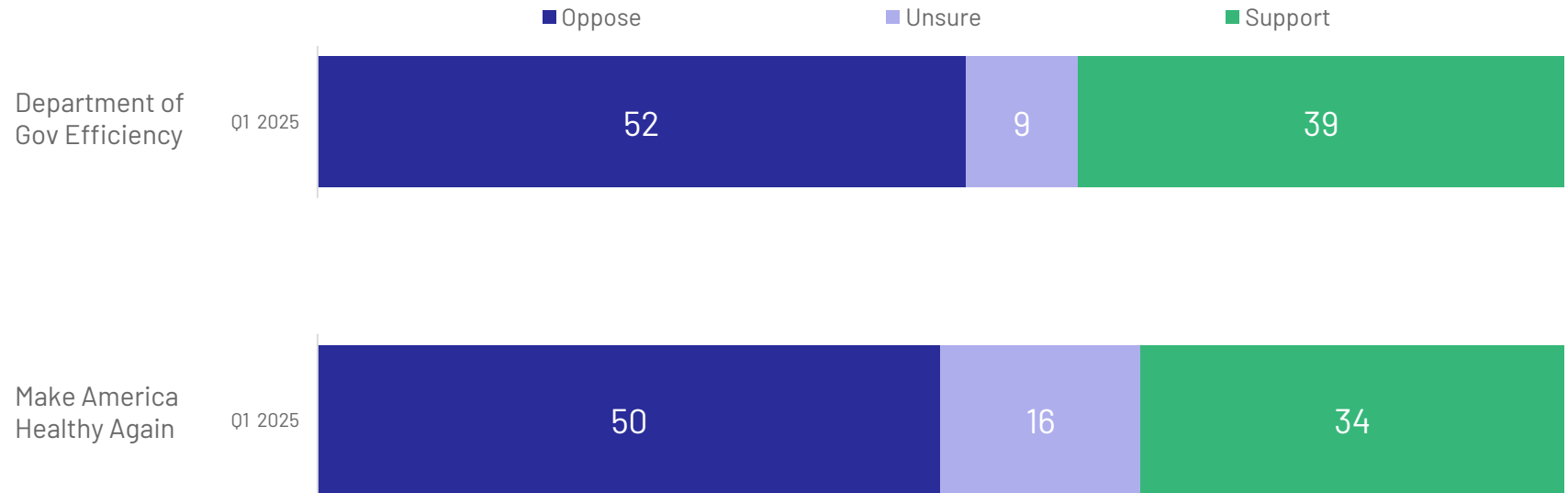
# CHANGES IN GOVERNMENT

*Tunnl asked U.S. Policy Opinion Makers their perception of key political reforms.*

About half (52%) of U.S. Policy Opinion Makers oppose DOGE.

Half of U.S. Policy Opinion Makers oppose the Make America Healthy Again movement.

## U.S. Policy Opinion Makers' Views Changes in Government



## INSIGHTS ON

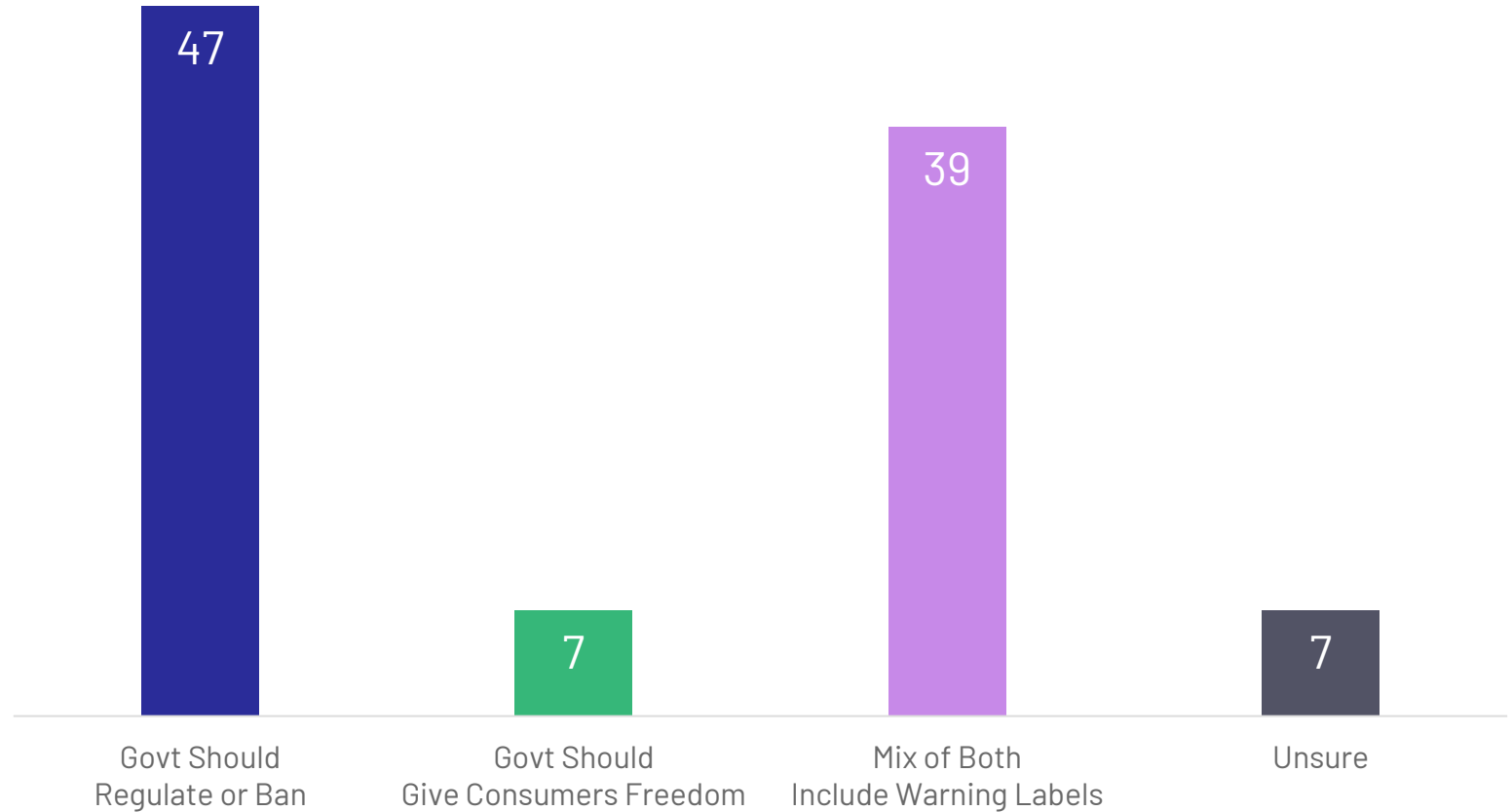
# HEALTH POLICY SHIFTS

*Tunnl asked U.S. Policy Opinion Makers their perception about new Health Policy changes.*

39% of U.S. Policy Opinion Makers believe in a mix of regulation and consumer choice, that there should be at least warning labels for products containing certain artificial food colors, while 47% agree with regulation or an all-out ban.

## U.S. Policy Opinion Makers View On Changes in Health Policies

Which of the following comes closest to your opinion about certain artificial food colors linked to health risks?





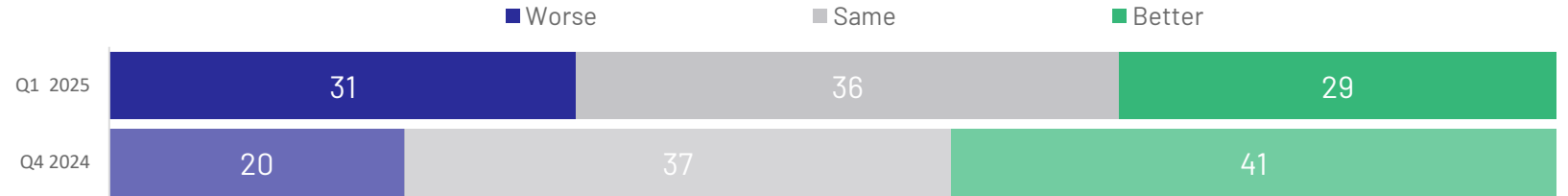
## INSIGHTS ON GOVERNMENT

*Tunnl asked U.S. Policy Opinion Makers their perception of key Governmental indicators over the next two years.*

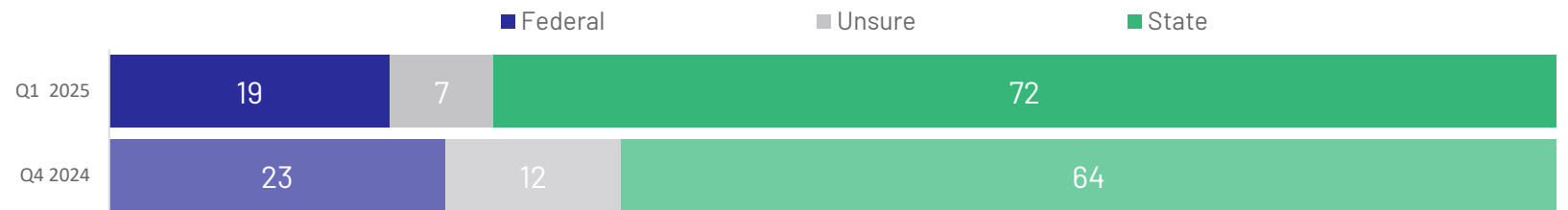
U.S. Policy Opinion Makers' views on the economic outlook in their state was consistent for the entirety of 2024. Since the new administration has taken place, only 65% say the outlook is better than or the same in their state compared to the rest of the country.

This group also consistently agrees that their state government is more functional than the federal government. At 72%, state government functionality has its highest favorability in the past two years.

### U.S. Policy Opinion Makers View on the Economic Outlook in Their State Compared with the Rest of the Country



### U.S. Policy Opinion Makers View on Which Government is More Functional

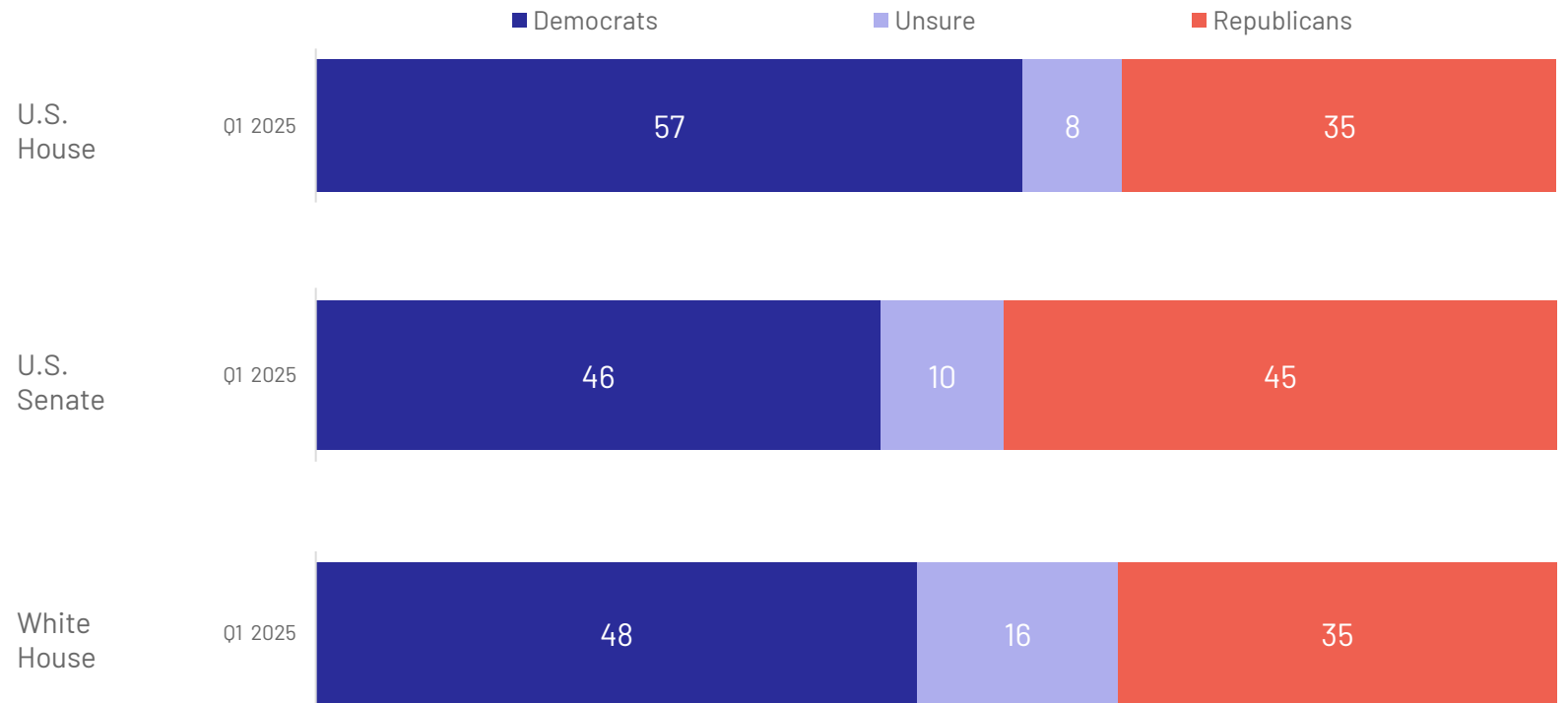


## INSIGHTS ON POLITICS

U.S. Policy Opinion Makers are more favorable towards Democrats overtaking the House in 2026. Views are split on control of the U.S. Senate.

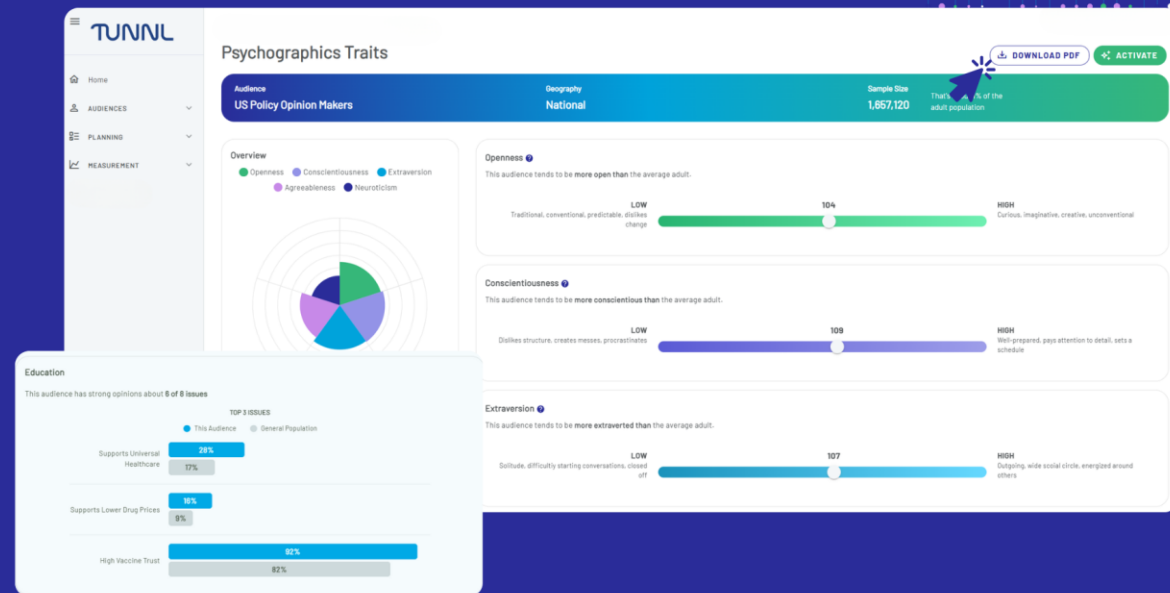
While 2028 is a ways off, there seems to be more uncertainty about which party will gain control, but the current view is tipped in favor of the Democrats.

### Which Party U.S. Policy Opinion Makers Think Will Gain Control in the Next Election



WANT TO START INFLUENCING KEY DECISIONMAKERS?

Tunnl has helped client ads reach more than **24M+** impressions in front of the U.S. Policy Opinion Makers so far this year and **221M+** since we culled this group into an addressable audience.



LEARN MORE ABOUT TUNNL

# Our AI-Powered Platform is a holistic solution for your organization.



## AUDIENCE IDENTIFICATION

We'll custom build audiences to meet your needs. You can also select or build audiences from our easy-to-use platform.



## INSIGHTS & MEDIA PLANNING

Understand your audience with insights on target demographics, issue stances, media consumption, and more.



## SEAMLESS ACTIVATION

We're channel agnostic and with the click of a button, we will push your audience to your buying platforms.



## ACTIONABLE MEASUREMENT

Measure campaign effectiveness and achieve incremental reach to maximize the impact of your campaigns.

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