

Updated for Q4 2022

THE STATE OF THE
US POLICY OPINION MAKERS

A TUNNL PREMIUM AUDIENCE

TUNNL

WHO ARE THE US POLICY OPINION MAKERS

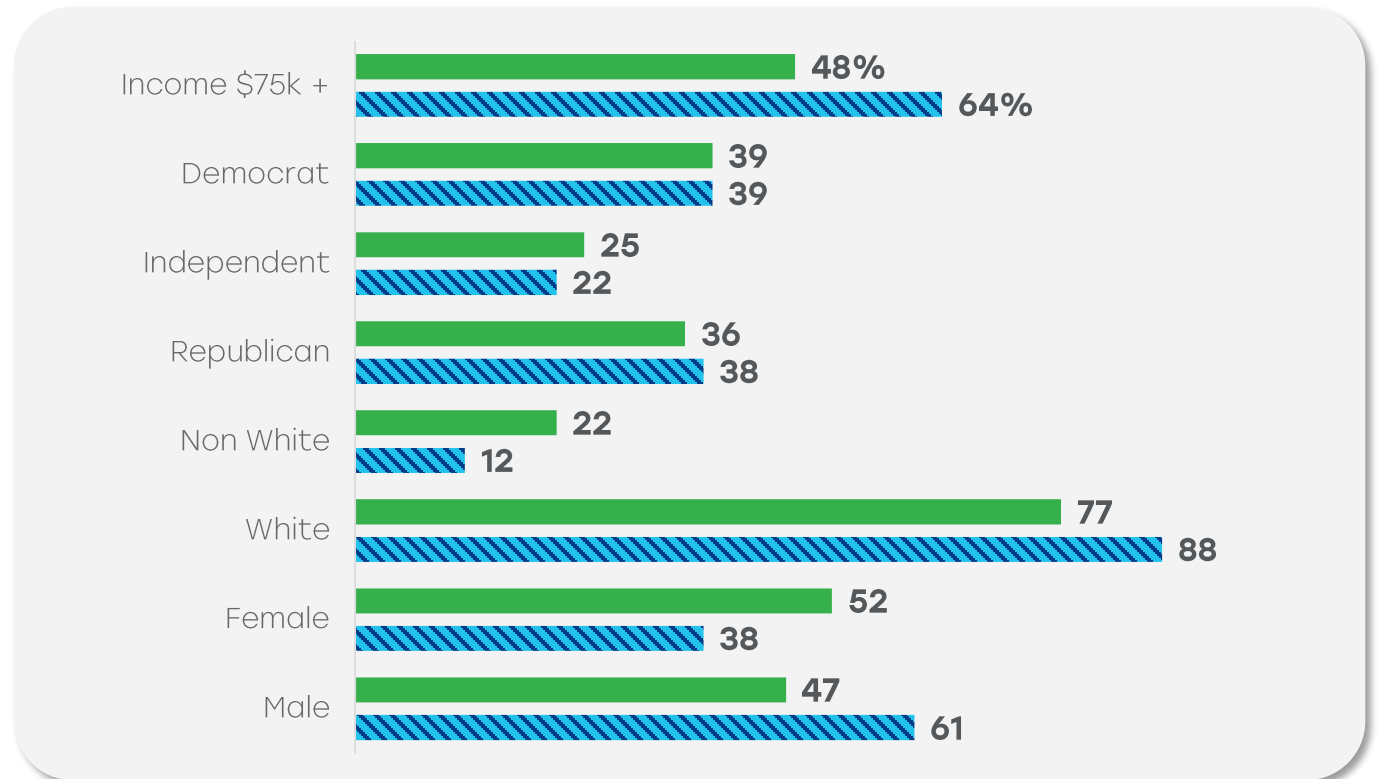
Tunni's audience of **1.3 million** US Policy Opinion Makers are **political and business leaders** who work in places such as Congress, the Executive Branch, the news media, lobbying and law firms, and more, combined with the **most politically active individuals** in America.



WHO ARE THE US POLICY OPINION MAKERS

These are the women and men who set the national agenda, have their finger on the pulse of what is happening in America, and direct the course of what is going to happen. US Policy Opinion Makers are split on their partisanship and are more likely than the average American to have an income over \$75k. Almost two-thirds of US Policy Opinion Makers are male; the remaining 38% are female.

 US POLICY
OPINION MAKERS  NATIONAL
AVG



THE TUNNL US POLICY OPINION MAKERS' OUTLOOK

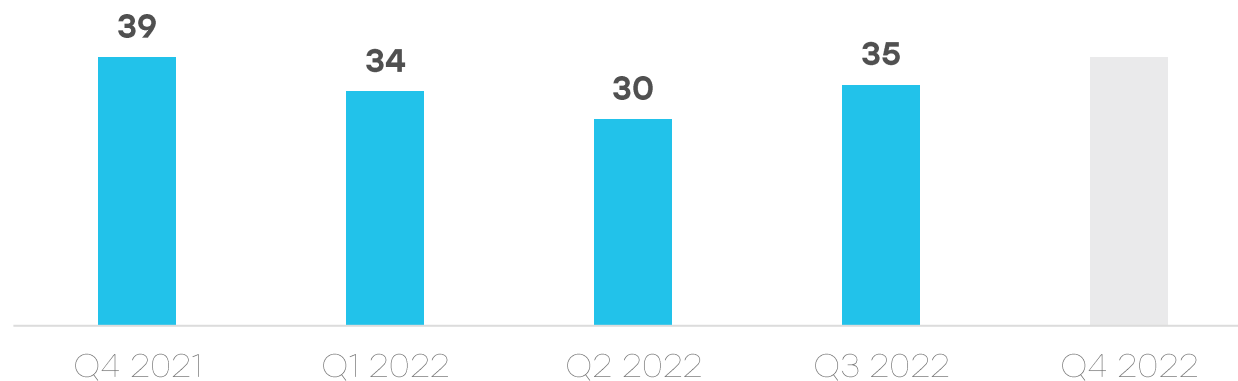
Using six indicator components from the US Policy Opinion Makers survey, Tunnl calculated an outlook to measure the direction of the country. The following six metrics impact this outlook, including perceptions on **interest rates**, the **stock market**, **unemployment**, **civil dialogue**, **race relations**, and **world safety**. The outlook ranges from 0 to 100, where 100 is the most ideal and optimistic outlook.

The current outlook sits at 35, a 5-point increase and 16% incline in direction over Q2 2022.



US Policy Opinion Makers' Outlook

35



WHAT'S IN THE SURVEY?

STABILITY

Safety and supply chain indicators predictive of the next six months

POLICY

Regulatory and legislative indicators predictive of the next two years

FINANCE

Financial and economic indicators predictive of the next six months

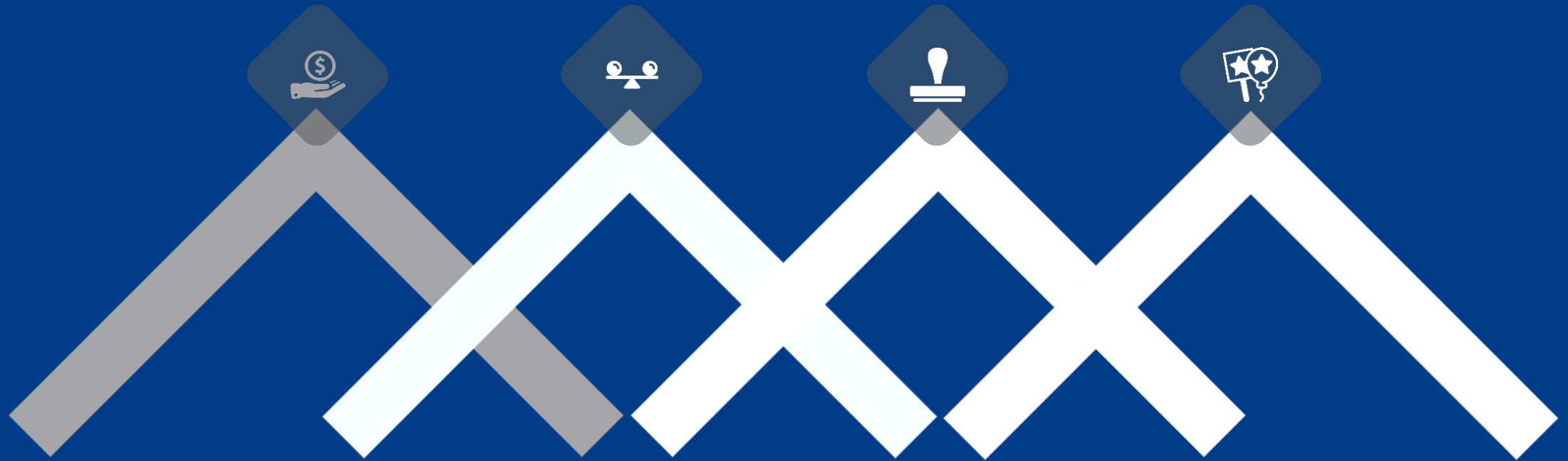
POLITICS

Government and social issue indicators predictive of the next two years



FINANCE

Financial and economic indicators
predictive of the next six months



INDICATORS FOR FINANCE

Tunni asked US Policy Opinion Makers about their perception of key financial indicators over the next six months.

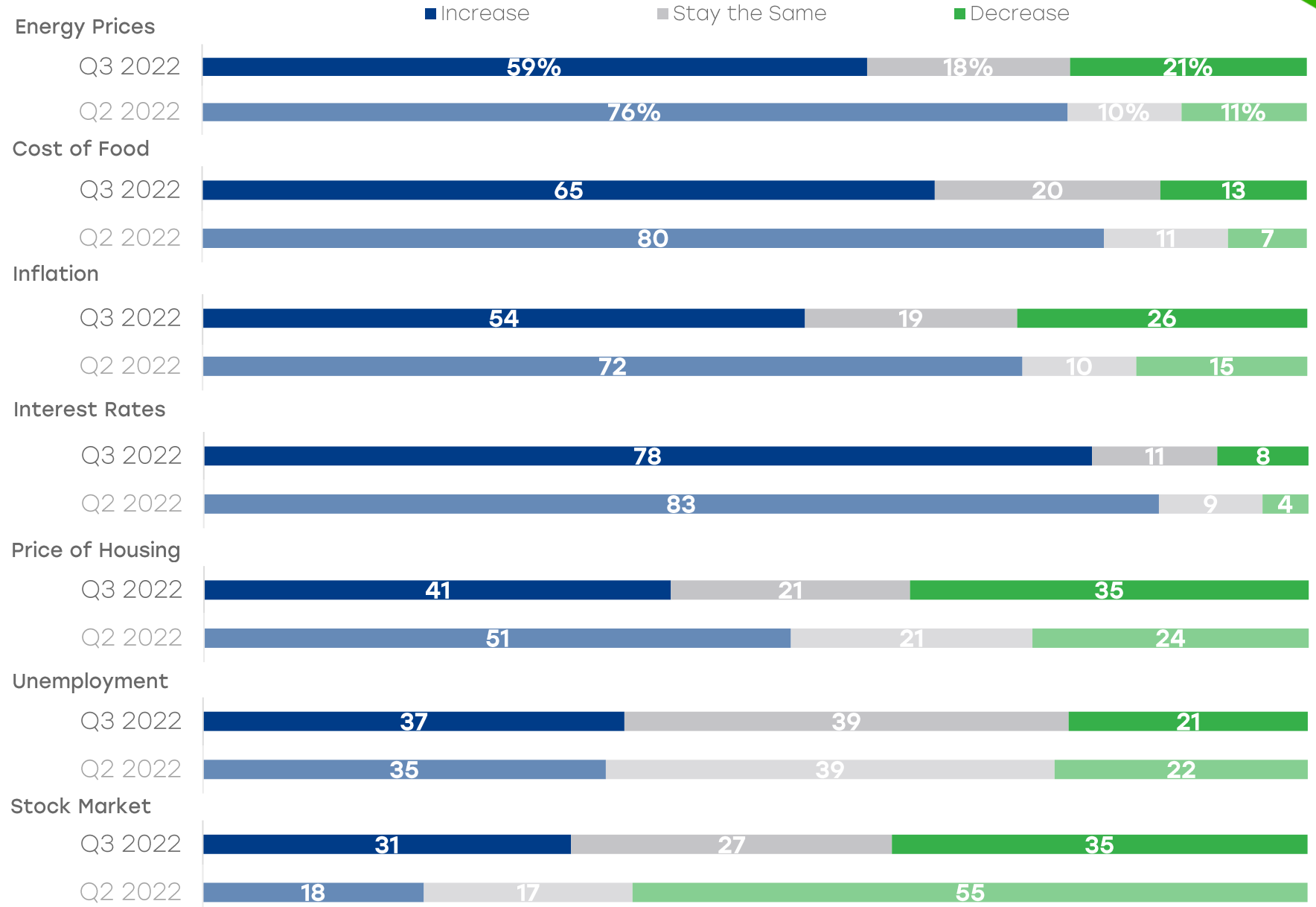
Generally, US Policy Opinion Makers are much more optimistic about energy prices, cost of food, and inflation than they were in Q2. Nearly 80% of US Policy Opinion Makers saw energy prices, cost of food, and inflation going up in Q2 and those numbers are now below two-thirds.

Over 30% see the stock market going up, representing a significant shift from Q2.

US Policy Opinion Makers' views on interest rates and unemployment remain largely unchanged, with most (78%) saying interest rates will go up and (60%) unemployment will remain the same or decrease.

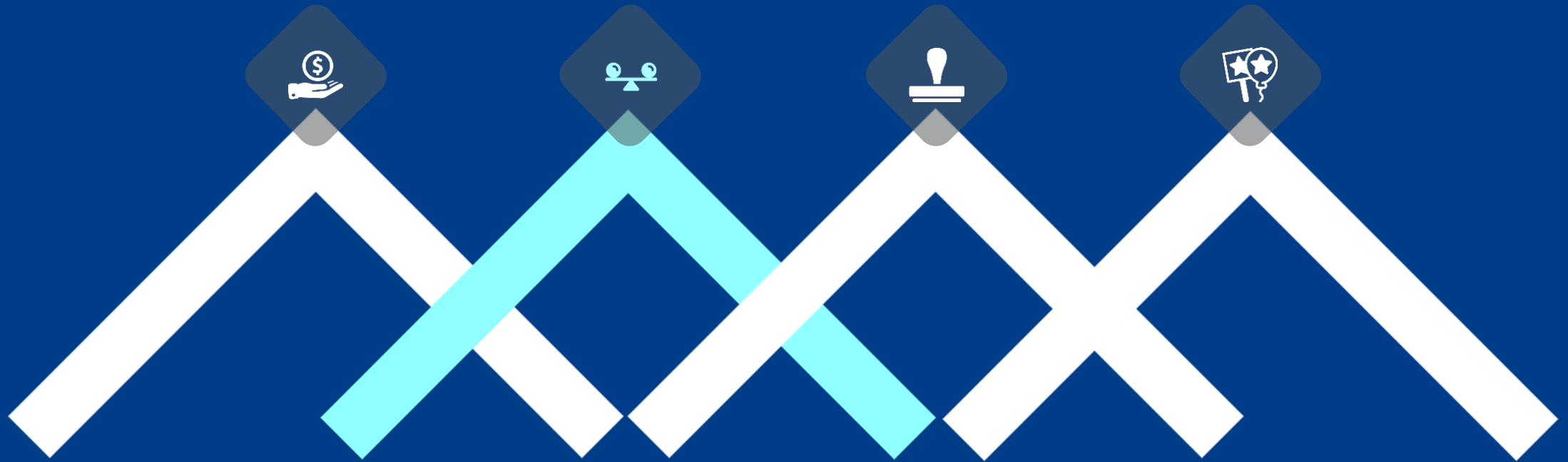


US Policy Opinion Makers Perception of Financial Indicators



STABILITY

Safety and supply chain indicators
predictive of the next six months



INDICATORS FOR STABILITY

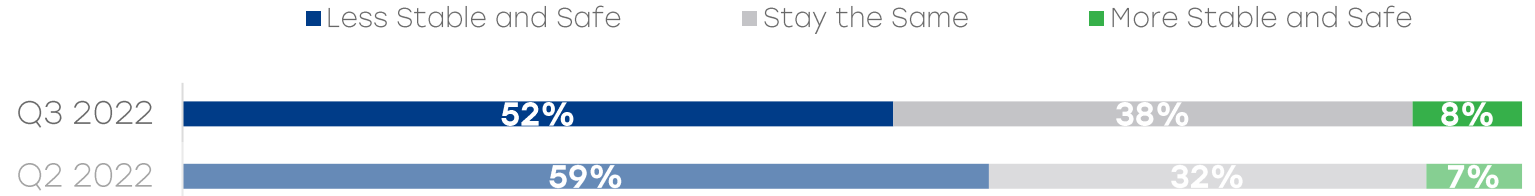
Tunnl asked US Policy Opinion Makers their perception of key stability indicators over the next six months.

US Policy Opinion Makers remain pessimistic on world safety, with a slight majority (52%) saying they think it will be less stable and safe—but this is still decreasing steadily from the beginning of 2022.

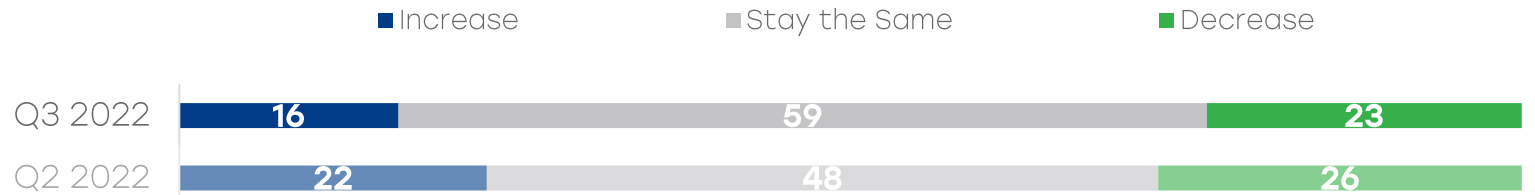
They are more optimistic about labor shortages and supply chain issues this quarter than last, with 82% saying labor shortages will stay the same or decrease and 78% saying supply chain issues will stay the same or improve.

Stability Indicators

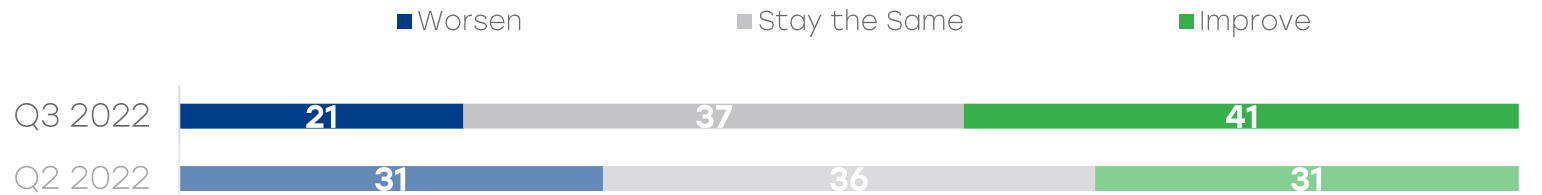
US Policy Opinion Makers' View on World Safety



US Policy Opinion Makers' View on Labor Shortages



US Policy Opinion Makers' View on Supply Chain Issues



INDICATORS FOR STABILITY

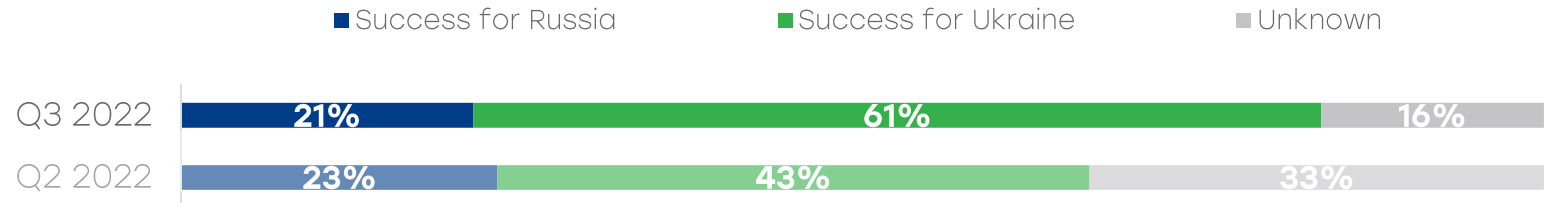
To expand stability indicators, Tunnl asked US Policy Opinion Makers their perception of the war in Ukraine.

Marking a change from the uncertainty of Q2, a majority of US Policy Opinion Makers now believe Ukraine will be successful. Their perception of Russian expansion if Russia were to win the war remains unchanged.

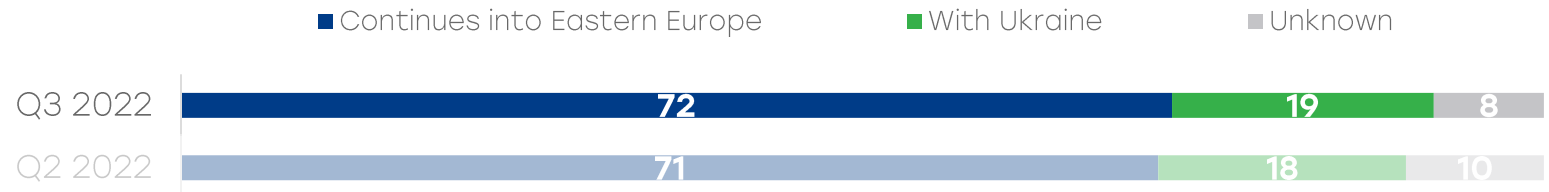
This audience overwhelmingly believes companies with business dealings in Russia should cut those ties (75%).

Stability Indicators

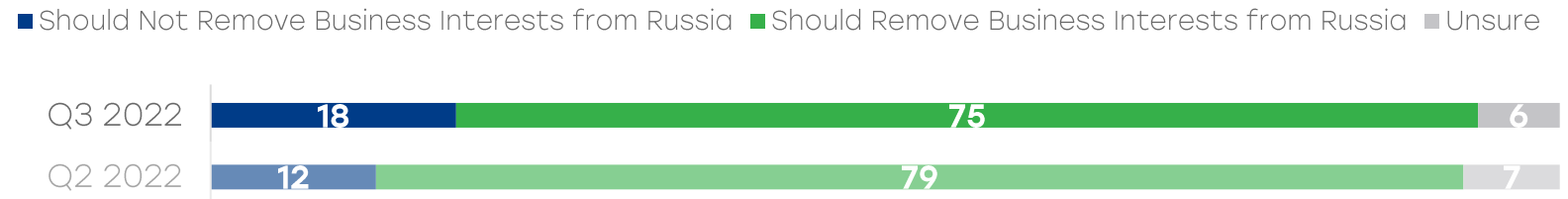
US Policy Opinion Makers' Prediction on Outcome of War



US Policy Opinion Makers' Perception of Where Russian Expansion Stops

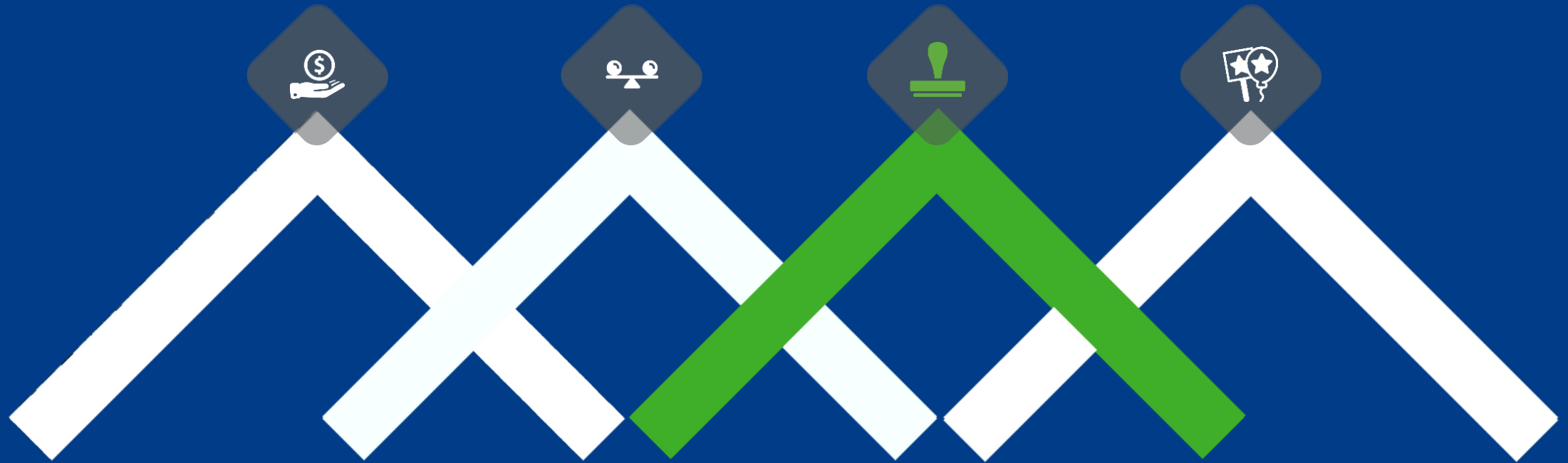


US Policy Opinion Makers' Views on Companies with Ties to Russia



POLICY

Regulatory and legislative indicators
predictive of the next two years



INDICATORS FOR POLICY

TunnI asked US Policy Opinion Makers their perception of key policy indicators over the next two years.

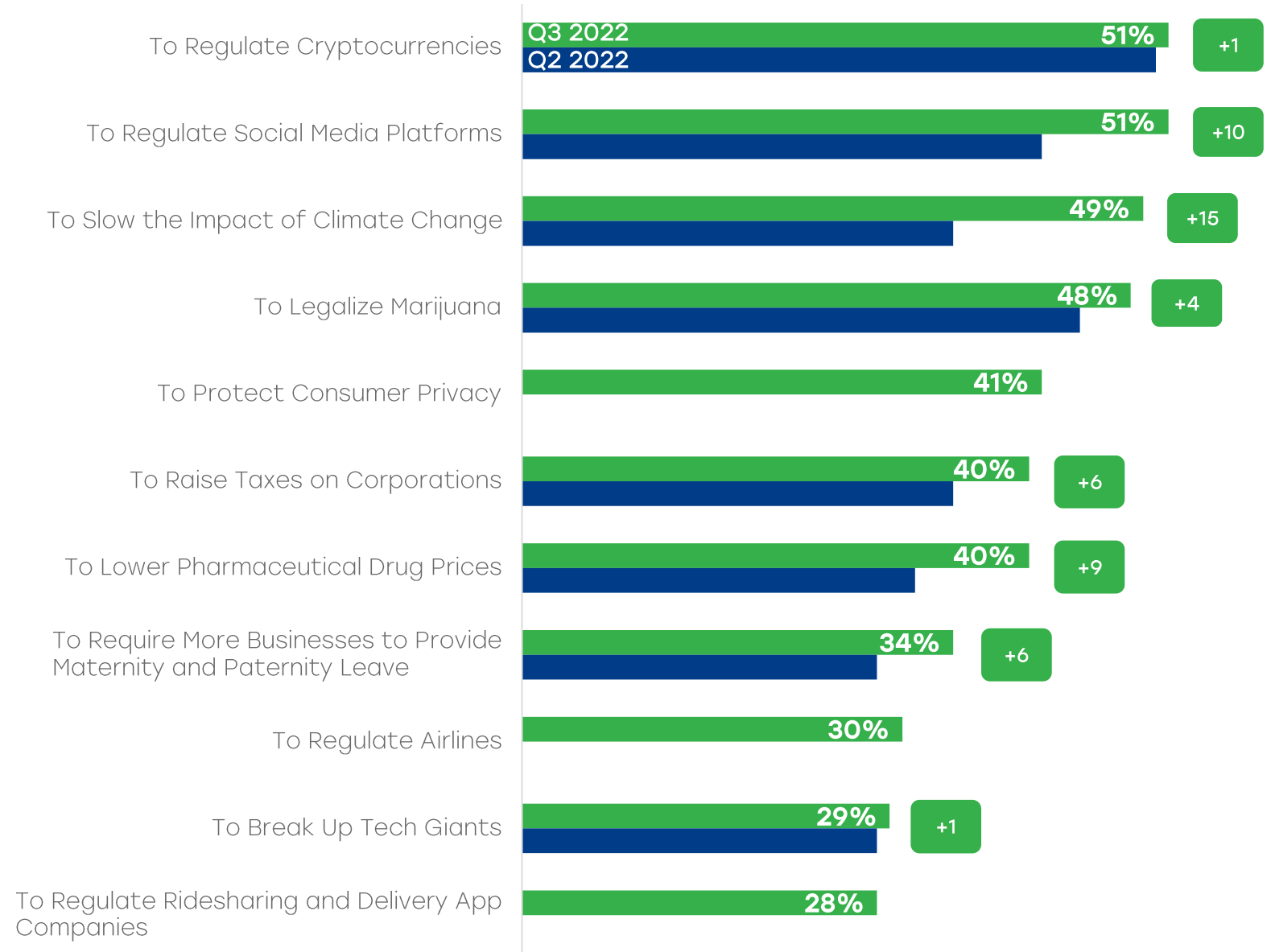
Across the board, the proportion of US Policy Opinion Makers who believe there will be **more federal legislation** passed on these 11 issues trended from last quarter. Q2 showed a dip in this confidence, but it has since rebounded, likely due to the slew of bills in support of President Biden's agenda that passed late in the summer.

About half of US Policy Opinion Makers think we may see more legislation to regulate cryptocurrencies, regulate social media platforms, slow climate change, and legalize marijuana. On drug prices and consumer privacy, US Policy Opinion Makers were split on the potential for more or the same amount of legislation.

This group expects there will be the same amount of legislation on airlines, breaking up tech giants, and regulating rideshare companies. They lean toward more legislation or about the same amount on family leave and raising taxes on corporations.

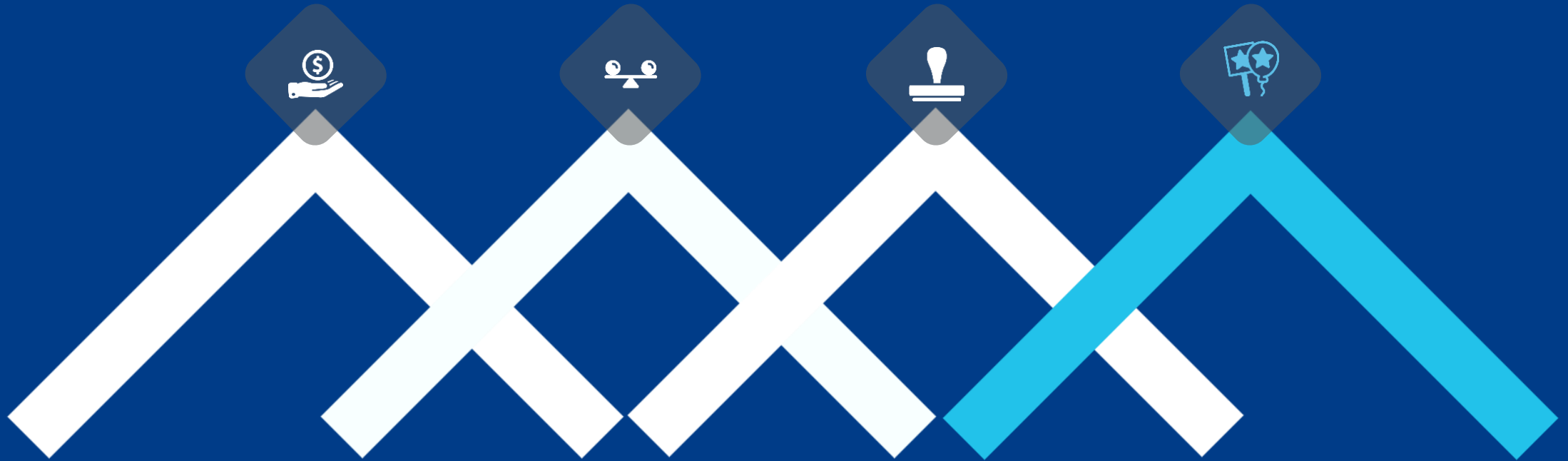


US Policy Makers Who Believe There Will Be More Federal Legislation



POLITICS

Government and social issue indicators
predictive of the next two years



INDICATORS FOR POLITICS

Tunnl asked US Policy Opinion Makers their perception of key political indicators over the next two years.

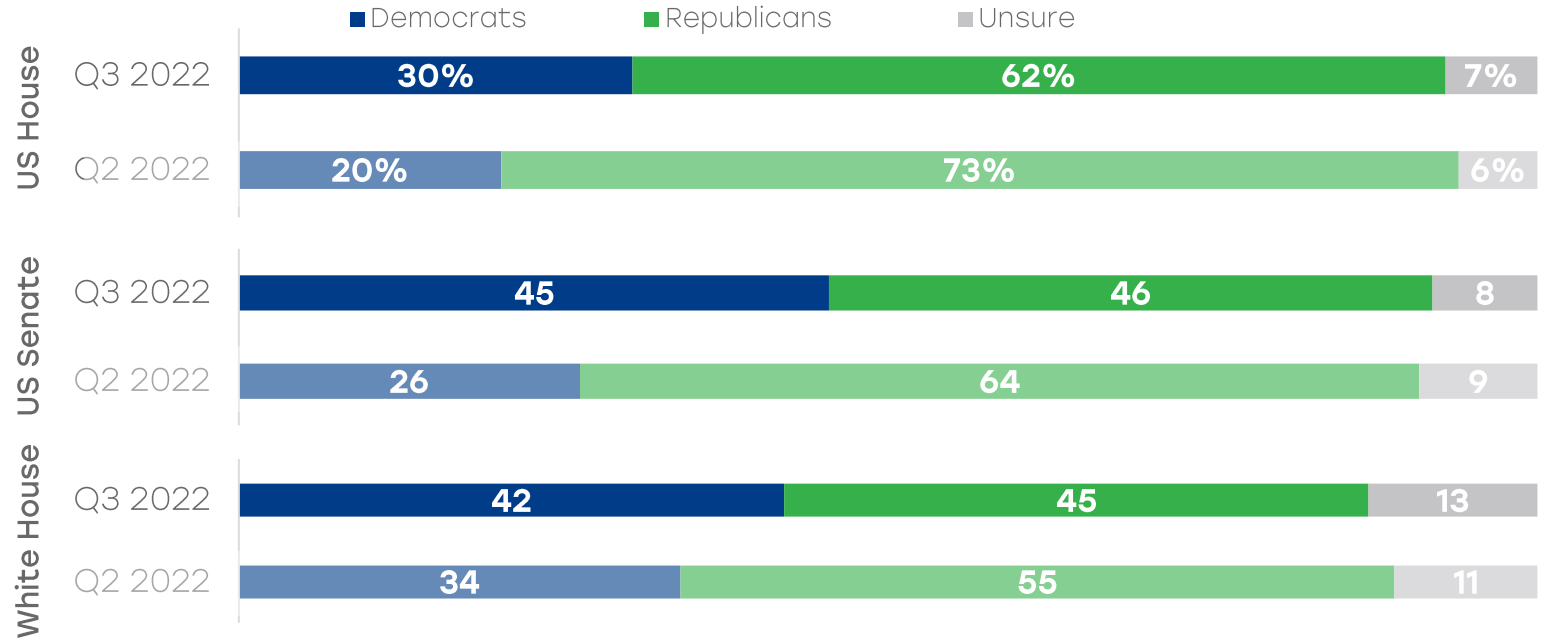
Looking at the 2022 election, the majority of US Policy Opinion Makers believe Republicans will win more seats in the House, but they are less certain than in Q2. There has been a radical shift in thinking regarding the Senate, and this audience is now split on whether Republicans or Democrats will win more seats.

Looking ahead at 2024, US Policy Opinion Makers have shifted their thinking on the White House as well, now almost split between the next president being a Republican or Democrat.

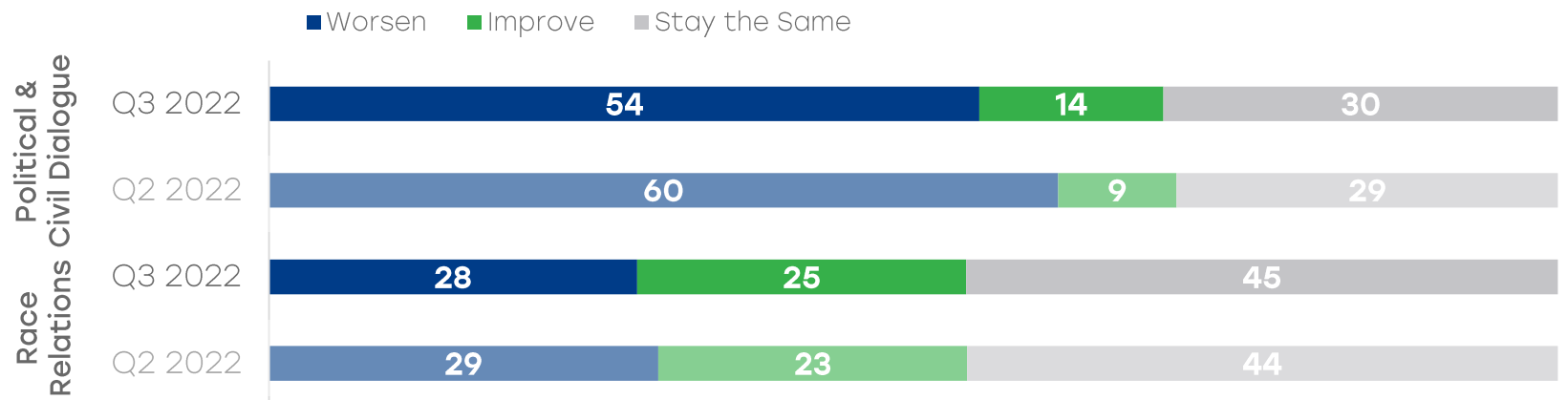
US Policy Opinion Makers continue to have a pessimistic view on our civil discourse and anticipate it worsening over the next couple of years. On balance, over two-thirds still believe race relations will stay the same or improve.



How US Policy Opinion Makers Think Seats Will Be Won in The Next Election



How US Policy Opinion Makers Think Political Conversations Will Change



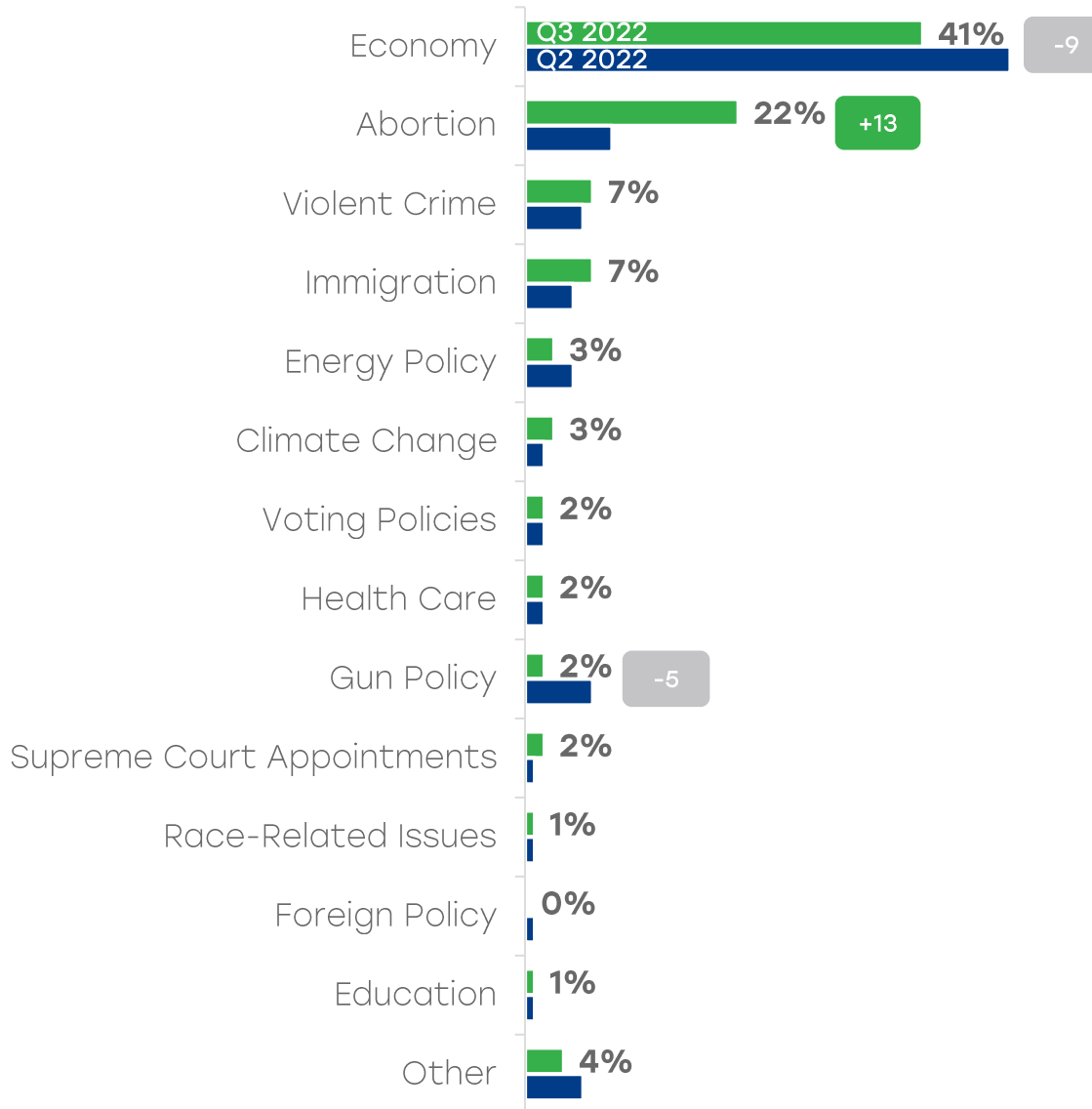
INDICATORS FOR POLITICS

TunnI asked US Policy Opinion Makers their perception of key political indicators over the next two years.

Looking ahead to the 2022 election, US Policy Opinion Makers still overwhelmingly believe that the economy will be the most important issue for voters, though the proportion dropped since Q2. Abortion jumped up in importance likely due to the Supreme Court's overturning of *Roe v. Wade*.

Some US Policy Opinion Makers believe violent crime and immigration will be the most important issue for voters in the next election, while gun policy isn't on people's minds as much as in Q2.

What US Policy Opinion Makers Think Will Be the Most Important Issue for Voters in the Next Major Election



INDICATORS FOR POLITICS

Tunni asked US Policy Opinion Makers their perception of key political indicators over the next two years.

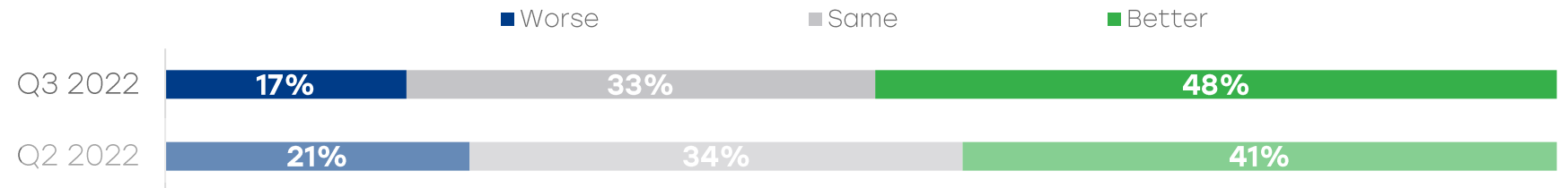
Quarter over quarter, US Policy Opinion Makers endorse a state-level outlook when compared to what is happening at the federal level.

Almost half of US Policy Opinion Makers continue to think the economic outlook in their state is better than the outlook for the rest of the country.

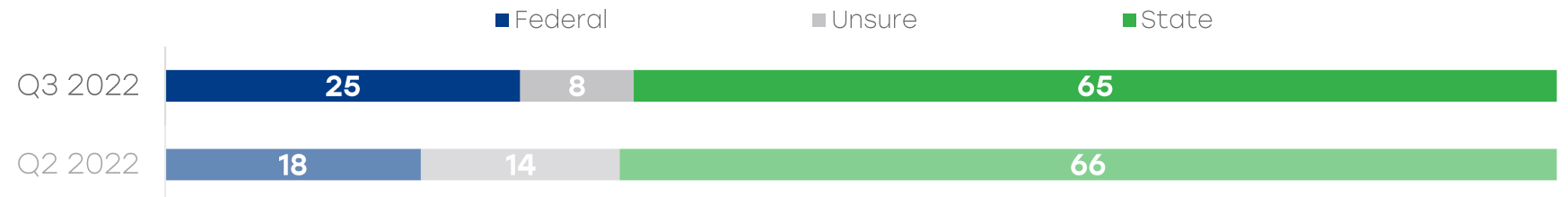
Additionally, two-thirds of US Policy Opinion Makers think their state government is more functional than the federal government, but there's more support for the federal government in Q3, as this audience grew more decisive on this question.



US Policy Opinion Makers' View on The Economic Outlook in Their State Compared with the Rest of the Country



US Policy Opinion Makers' View on Which Government is More Functional



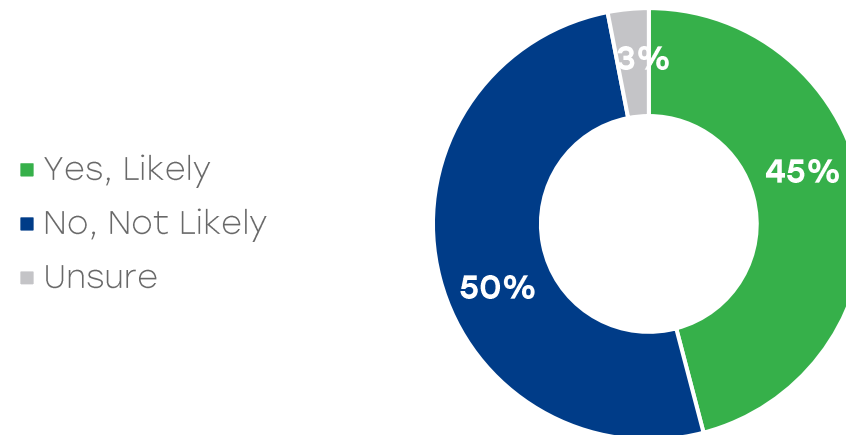
INDICATORS FOR POLITICS

Tunni asked US Policy Opinion Makers their perception of a current political issue.

President Biden's Build Back Better plan included social priorities like the child tax credit and FMLA leave, which Congress hasn't made progress on thus far this session.

US Policy Opinion Makers were split on whether they think it's likely that Congress uses the lame duck session after Election Day to pass some social legislation.

US Policy Opinion Makers' Opinion on Whether Congress is Likely to Pass Legislation Addressing Some of President Biden's Social Priorities During the Lame Duck Session after November's Election



CONNECT WITH WHO CARES

WHO WE ARE

Tunnl exists to create and connect customers with the audiences that matter most. This is our why, our purpose, and the reason we find passion in our work. We create the powerful link between brands and issues, melding cause and believer. Our drive and relentless focus on always digging deeper to identify, create, and connect with the right audiences is unmatched.

As more consumers turn to brands to solve social issues in the world around them, the expectation and responsibility placed on them continues to increase. We provide deeper, richer data through an easily integrated platform to get you the precise results you need to take action” to “Consumers have never cared more about how brands handle social issues, and it’s impacting how they buy. Tunnl is an audience identification and segmentation platform that empowers purpose-driven marketing, issue advocacy, and brand reputation campaigns. With relevant, human insights, Tunnl helps advertisers deeply connect with the people who care about their message to inspire action. Leverage Tunnl’s insights across campaigns of all types including CTV, OTT, and social media with direct integrations into media buying platforms. Learn more at www.TunnlData.com and email Brian Rose, Tunnl’s VP of Business Development, at brose@tunnldata.com to find out how you can leverage Tunnl’s exclusive US Policy Opinion Makers audience in your strategy.

