

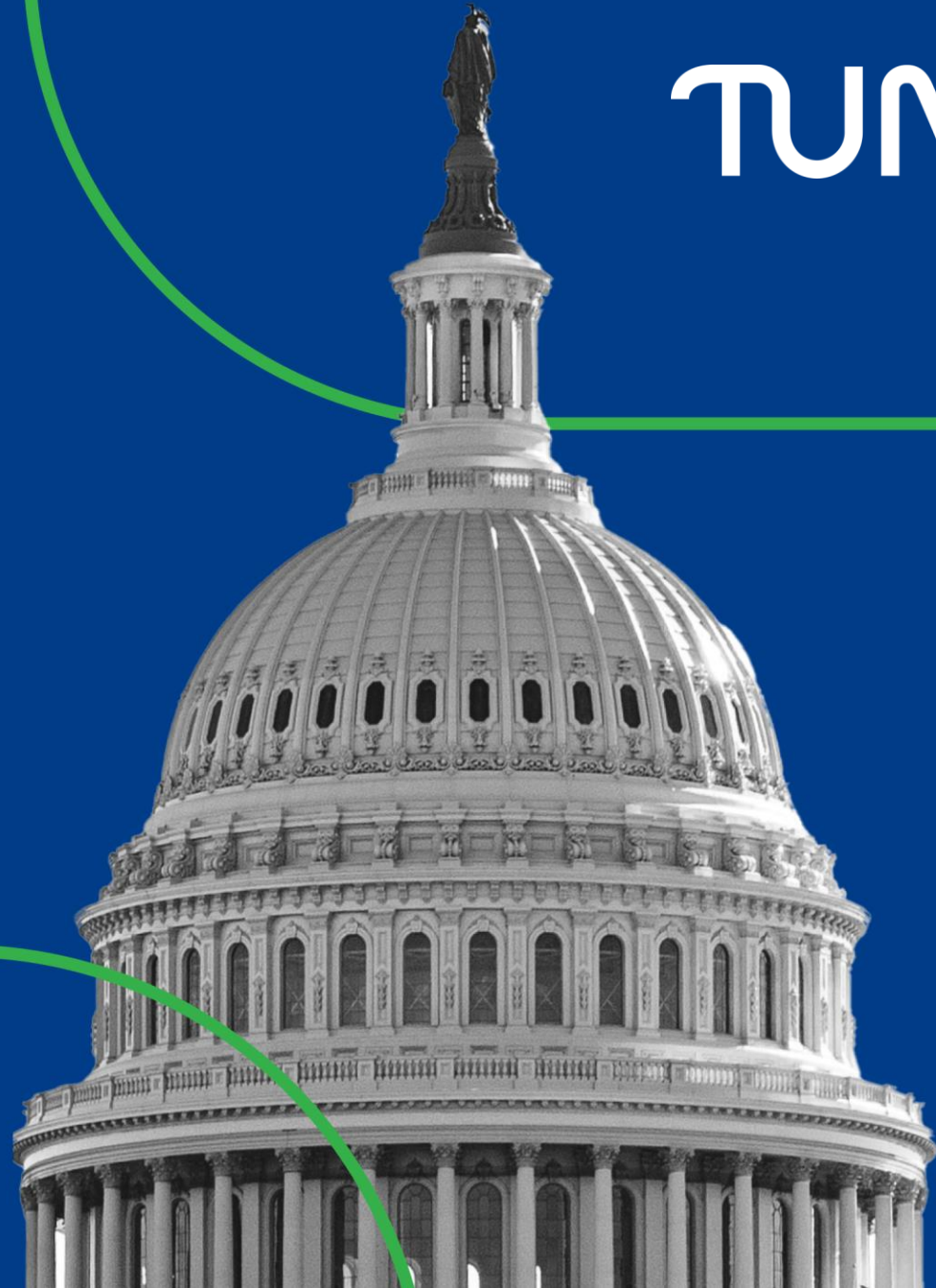
Q1 2024

TUNNL

THE STATE OF THE

U.S. POLICY OPINION MAKERS

A TUNNL PREMIUM AUDIENCE



THE TUNNL U.S. POLICY OPINION MAKERS

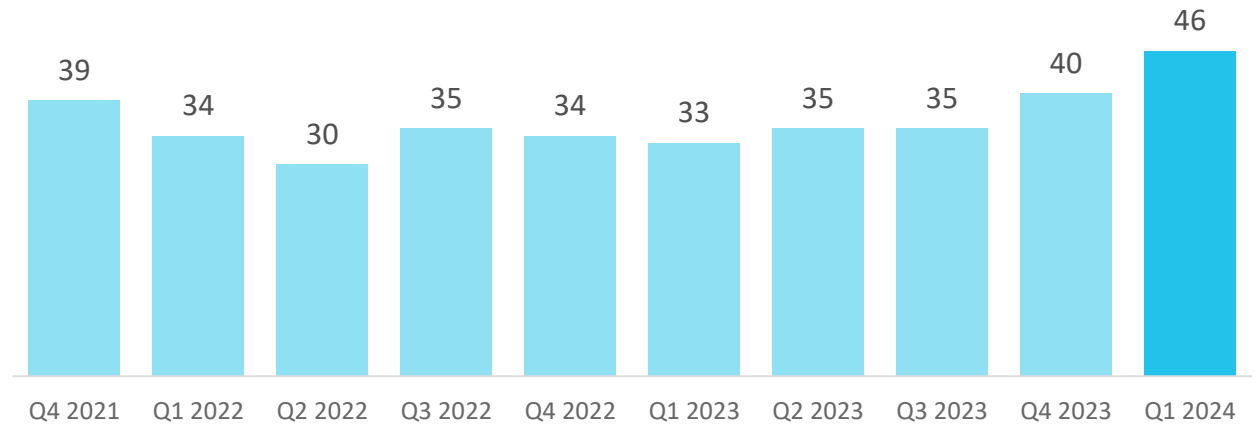
OUTLOOK

Using six indicator components from the U.S. 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.

U.S. Policy Opinion Makers Outlook

46
OUT OF 100

The current outlook sits at 46; following the optimistic trend from last quarter.



WHAT'S IN THE SURVEY



FINANCE

Financial and economic indicators
predictive of the next six months



STABILITY

Safety and supply chain indicators
predictive of the next six months



POLICY

Regulatory and legislative indicators
predictive of the next two years



POLITICS

Government and social issue indicators
predictive of the next two years

KEY INDICATOR

FINANCE

Financial and economic indicators predictive of the next six months



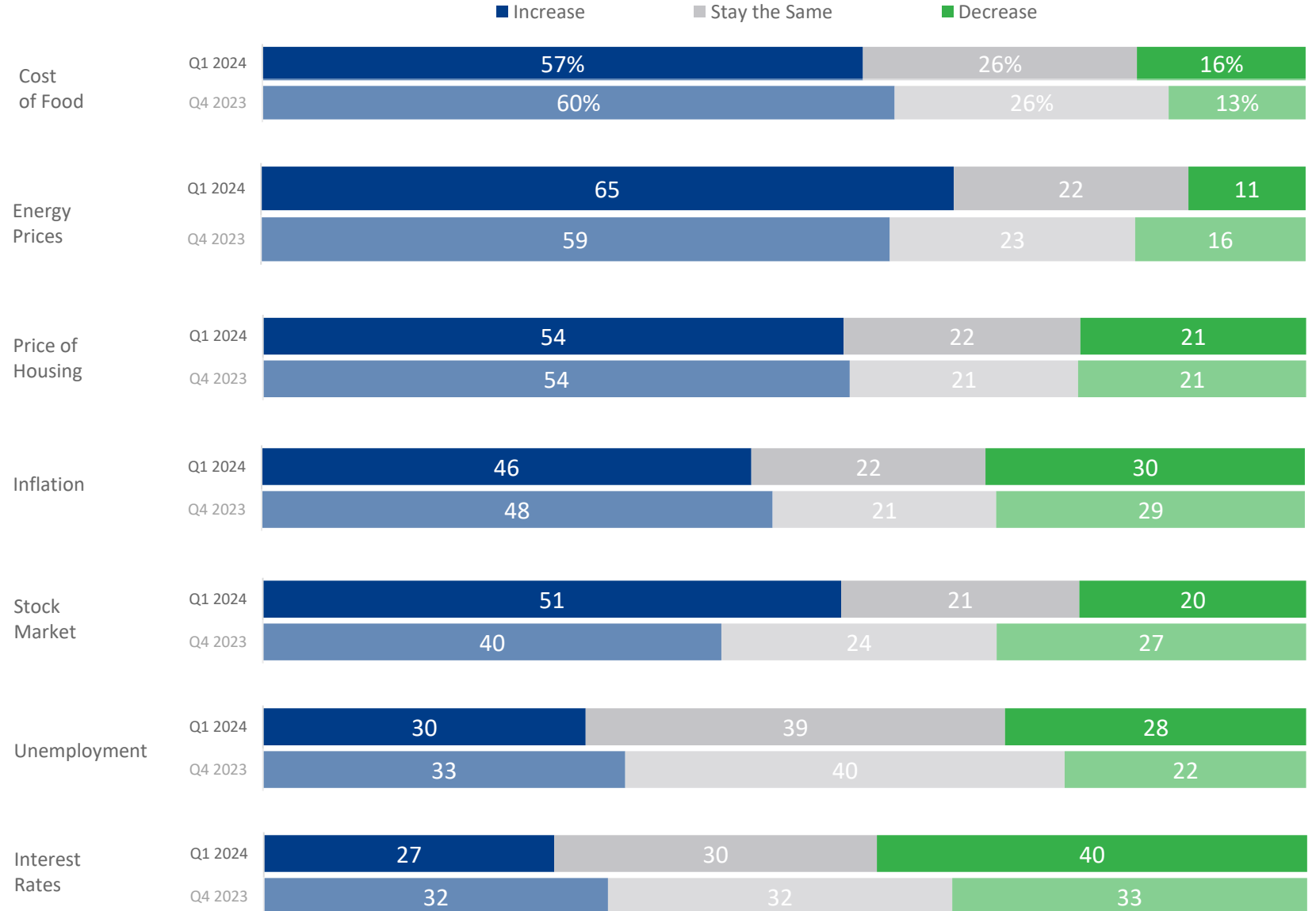
INDICATORS FOR FINANCE

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

U.S. Policy Opinion Makers are significantly more optimistic about financial indicators across the board this quarter. Only 27% think interest rates will increase over the next six months, marking a five-point change from last quarter. This also marks the fifth consecutive quarter we have seen this downward trend.

For the second time since we began tracking, more than half of U.S. Policy Opinion Makers believe inflation will either stay the same or decrease over the next six months.

U.S. Policy Opinion Makers Perception of Financial Indicators



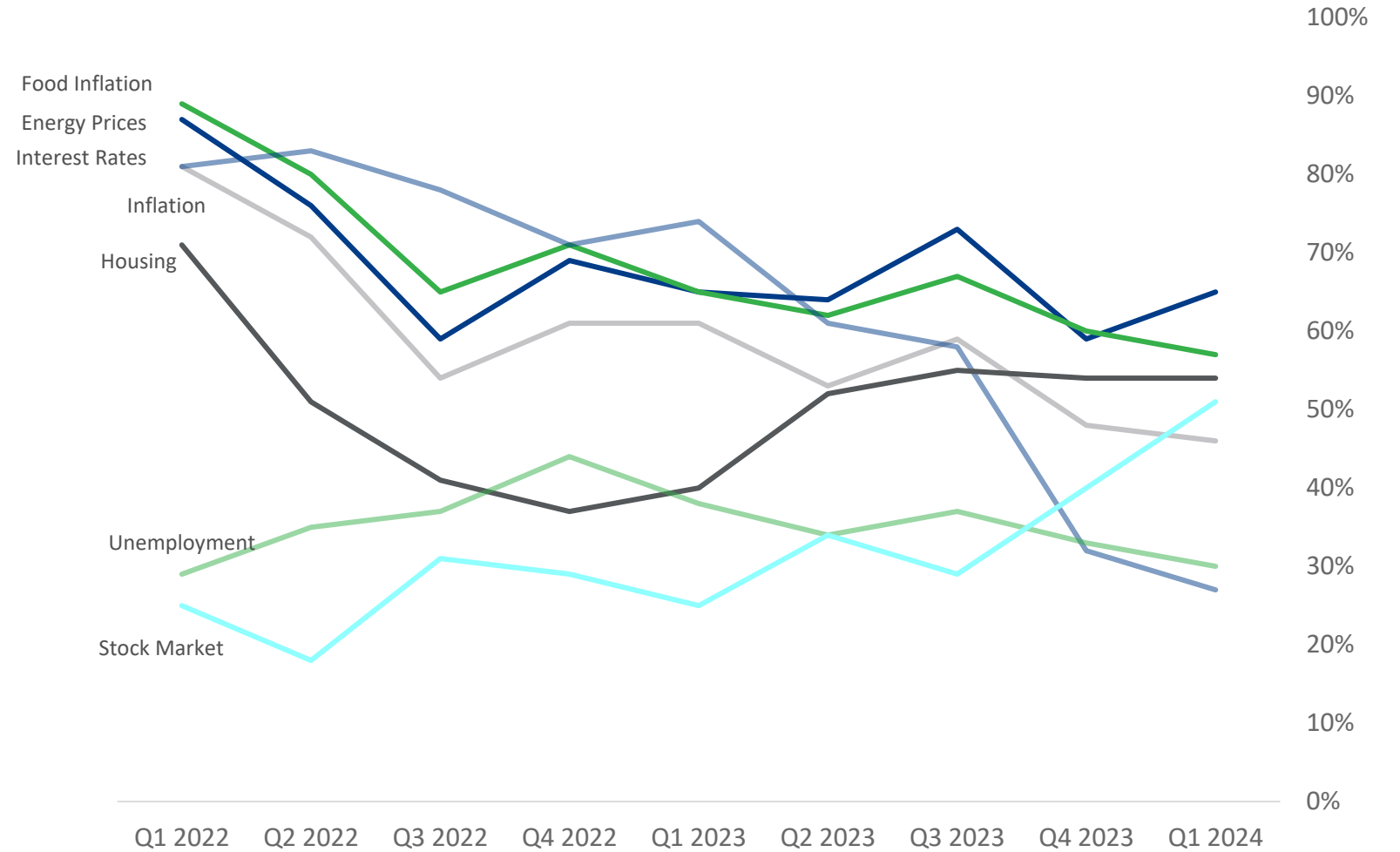
INDICATORS FOR FINANCE

U.S. Policy Opinion Makers' perception of seven key financial indicators has fluctuated with the economy over the last two years.

This group's outlook on the stock market is the best it's been in the last two years, with more than half (51%) expecting to see an increase over the next six months, an increase of nine-points since last quarter.

U.S. Policy Opinion Makers are optimistic this quarter, with six of the seven indicators trending in the right direction.

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



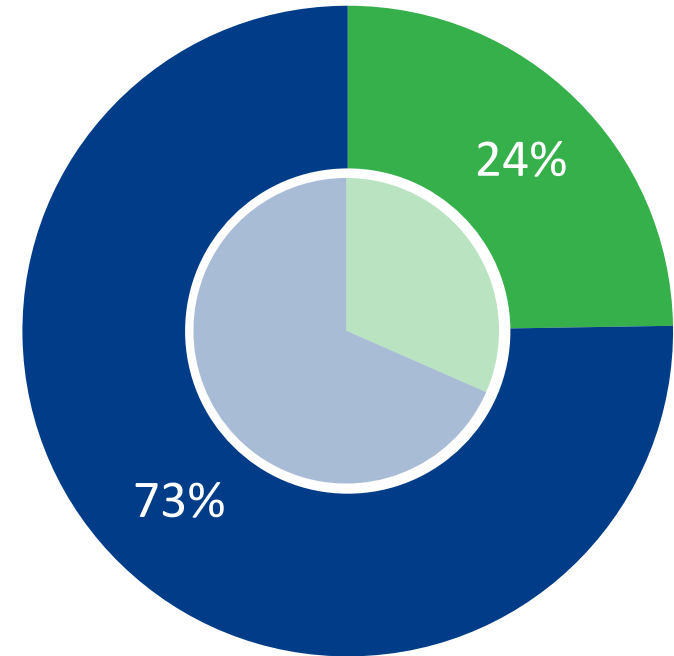
INDICATORS FOR FINANCE

Tunnl asked U.S. Policy Opinion Makers if they believe there will be an economic recession in the United States within the next six months.

Less than a quarter (24%) of U.S. Policy Opinion Makers believe there will be a recession in the next six months. This is down from 30% in Q4 and 37% in Q3.

U.S. Policy Opinion Makers Who Believe There Will Be an Economic Recession

- Yes, there will be a recession
- No, there will not be a recession



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KEY INDICATOR

STABILITY

Safety and supply chain indicators predictive of the next six months



INDICATORS FOR STABILITY

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

Over half (56%) of U.S. Policy Opinion Makers believe that the world will be less stable and safe over the next six months, an eight-point decrease since last quarter. Compared to Q1 2023, it is a one-point decrease overall.

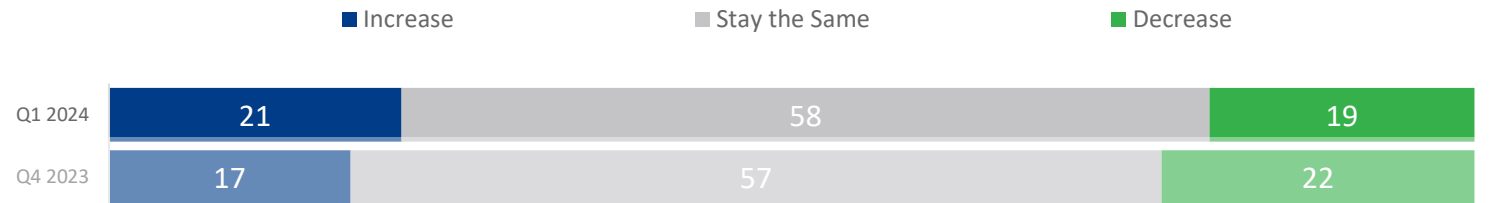
U.S. Policy Opinion Makers' views on labor shortages have declined slightly over last quarter, with 58% saying they will likely stay the same, compared to 57% last quarter.

Stability Indicators

U.S. Policy Opinion Makers View on World Safety



U.S. Policy Opinion Makers View on Labor Shortages



INDICATORS FOR STABILITY

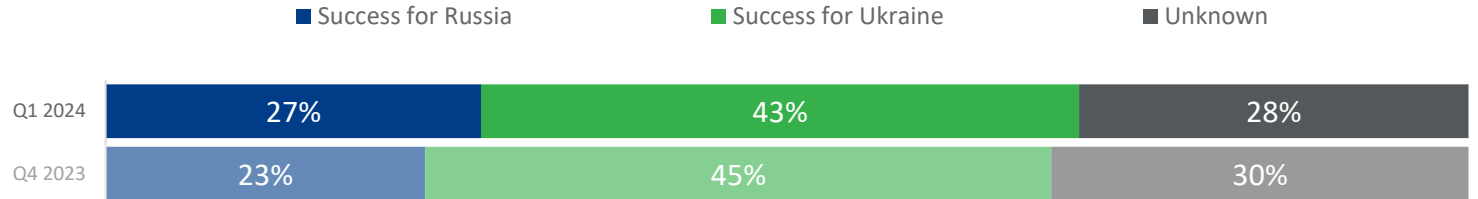
To expand stability indicators, Tunnl asked U.S. Policy Opinion Makers their perception of the ongoing war in Ukraine.

The proportion of this group who predict success for Ukraine has decreased by two-points. Since Q1 2023, we have seen an 18-point decrease among U.S. Policy Opinion Makers' prediction of success for Ukraine.

Over three-quarters (77%) of U.S. Policy Opinion Makers continue to believe that Russia will advance into Eastern Europe if they're successful in Ukraine.

Stability Indicators

U.S. Policy Opinion Makers Prediction on Outcome of War



U.S. Policy Opinion Makers Perception of Where Russian Expansion Stops



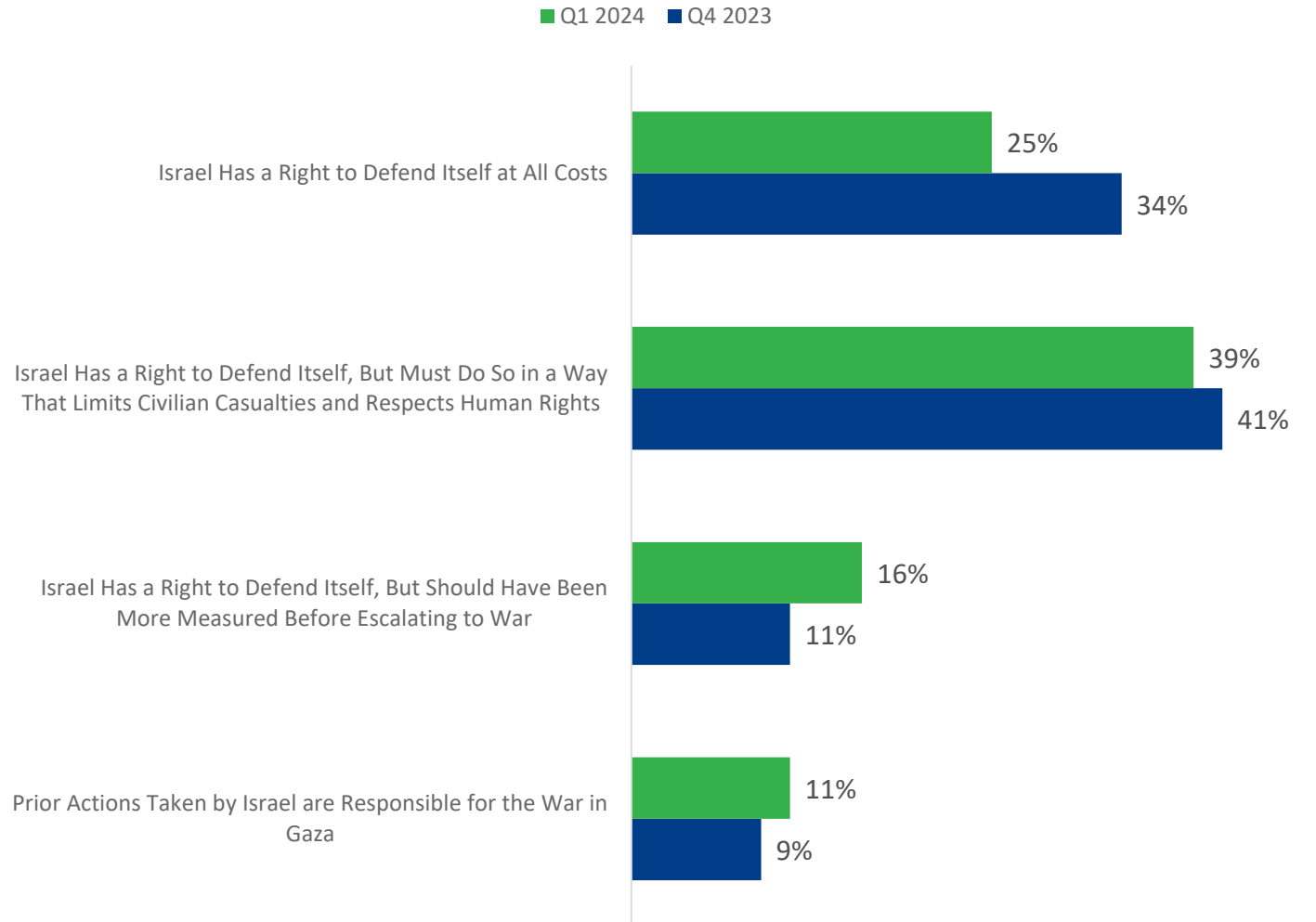
INDICATORS FOR STABILITY

New last quarter, Tunnl asked U.S. Policy Opinion Makers about the war between Israel and Hamas.

Nearly two in three (64%) of respondents believe Israel was justified in going to war with Hamas, but they are divided on the right approach to do so, this is an 11-point decrease from last quarter.

25% of U.S. Policy Opinion Makers believe that Israel has an obligation and a right to defend itself at all costs from outside actors and terrorists. However, 39% believe that Israel has a right to defend itself but must do so in a way that respects basic human rights.

U.S. Policy Opinion Makers Opinion on War Between Israel and Hamas



TUNNL

KEY INDICATOR

POLITICS

Government and social issue indicators predictive of the next two years



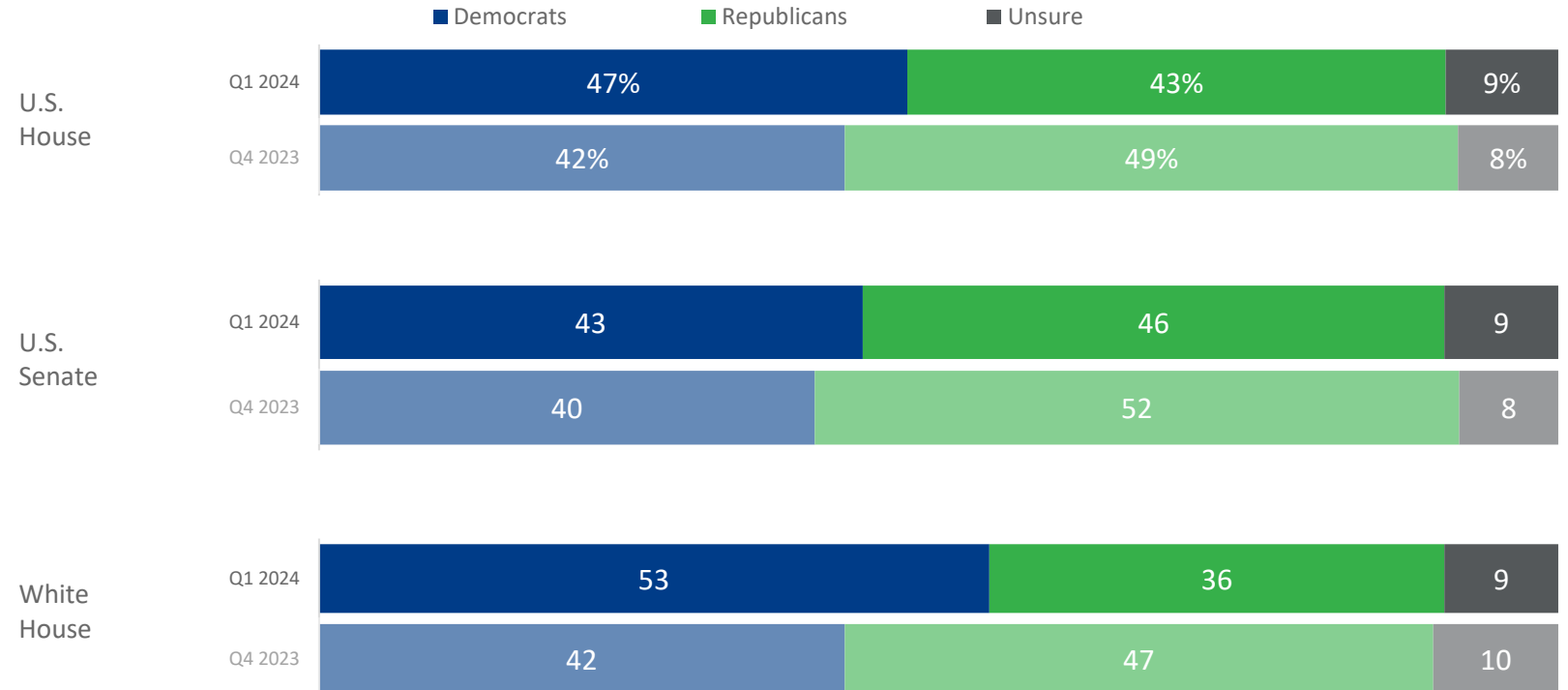
INDICATORS FOR POLITICS

Tunnl asked U.S. Policy Opinion Makers their perception of key political indicators in the next major elections in 2024.

Last quarter, more U.S. Policy Opinion Makers thought Republicans would win control the House (49%) compared to 42% of Democrats. This quarter, control flipped to think Democrats will win control of the House 47% to Republicans' 43%.

We also see a flip in who U.S. Policy Opinion Makers think will win control of the White House. Last quarter, 47% believed Republicans would win the White House, compared to 42% Democrats. This quarter, a majority of respondents believe the Democrats will win the White House (53%) compared to only 36% Republicans.

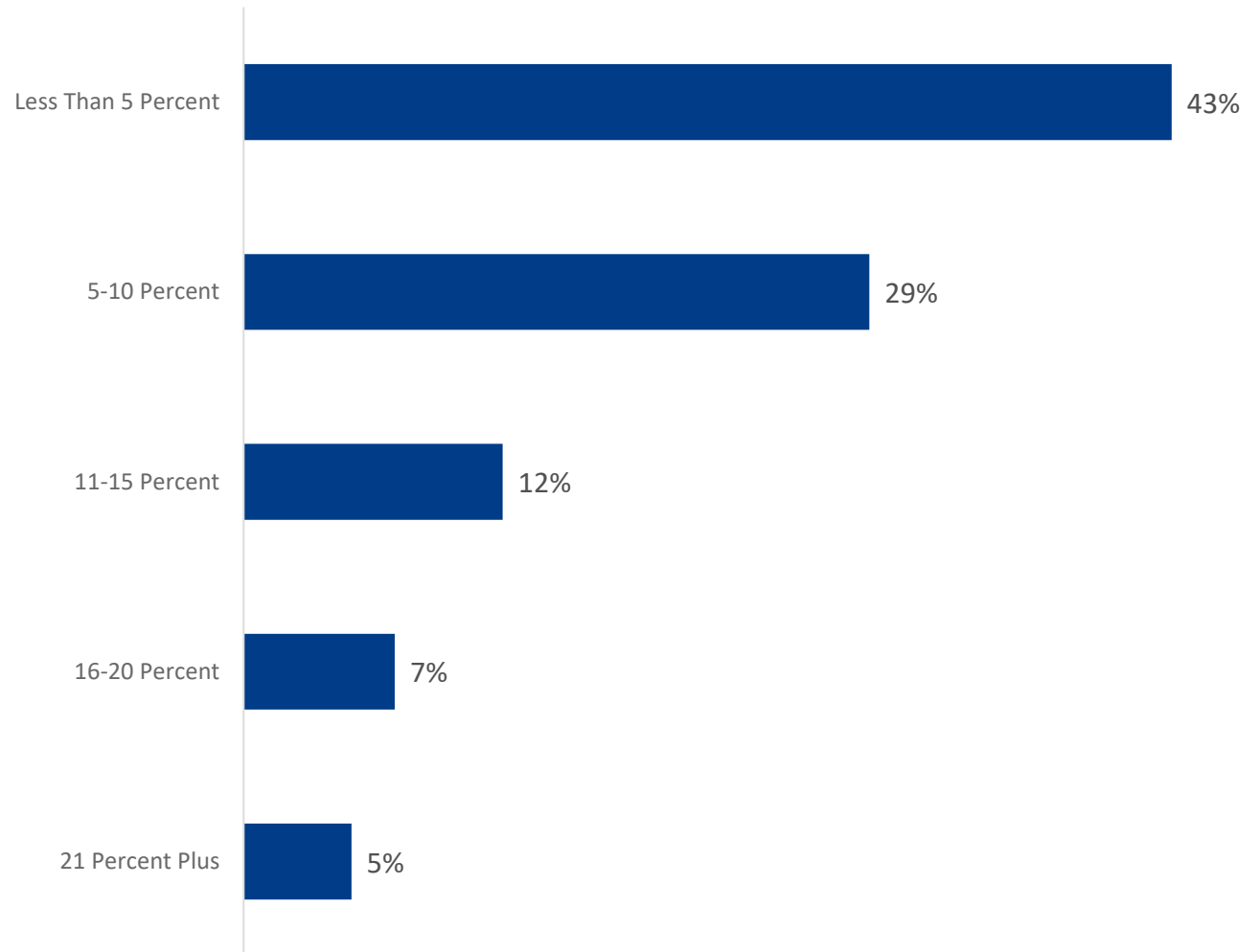
Which Party U.S. Policy Opinion Makers Think Will Gain Control in The Next Election



INDICATORS FOR POLITICS

New this quarter, Tunnl asked U.S. Policy Opinion Makers what percent of the vote in November's general election they think a 3rd party candidate will win for President. Almost half (43%) of U.S. Policy Opinion Makers think a 3rd party candidate will receive less than 5% of the vote in November, which isn't surprising considering it's been over 30 years since a 3rd party candidate has won over 5%.

What Percent of the Vote in November's General Election Do U.S. Policy Opinion Makers Think a 3rd Party Candidate for President Will Win



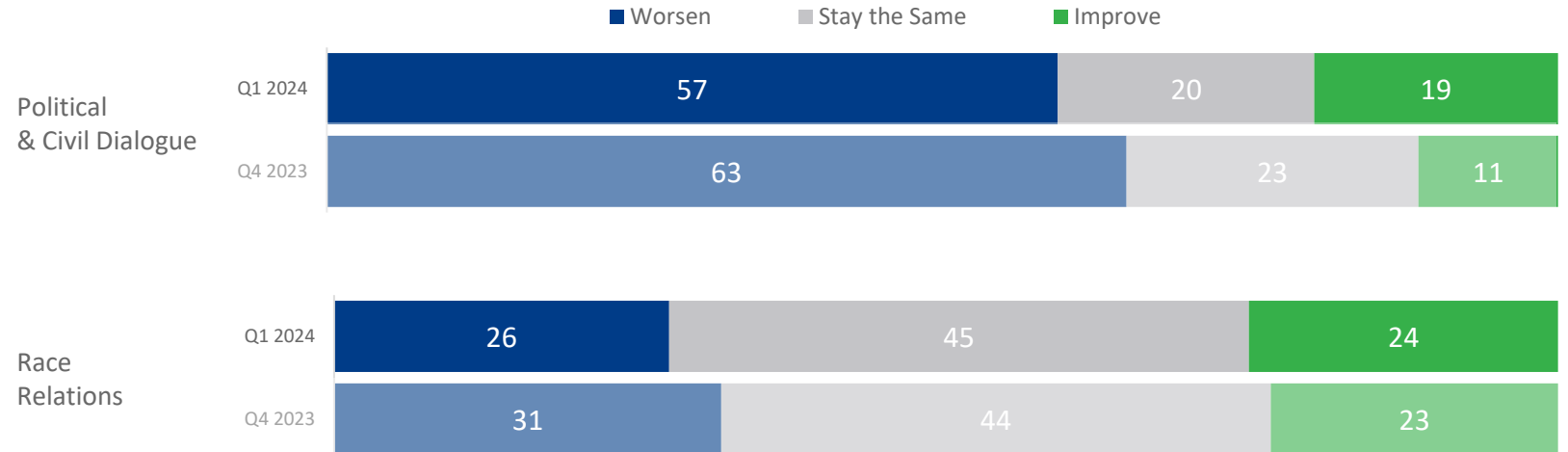
INDICATORS FOR POLITICS

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

U.S. Policy Opinion Makers' optimistic view on our civil discourse is improving; last quarter, just 11% believed it would get better compared to 19% this quarter- an **eight-point increase**.

Additionally, 69% of this group believe race relations will stay the same or improve, which is a two-point increase from last quarter.

How U.S. Policy Opinion Makers Think Political Conversations Will Change

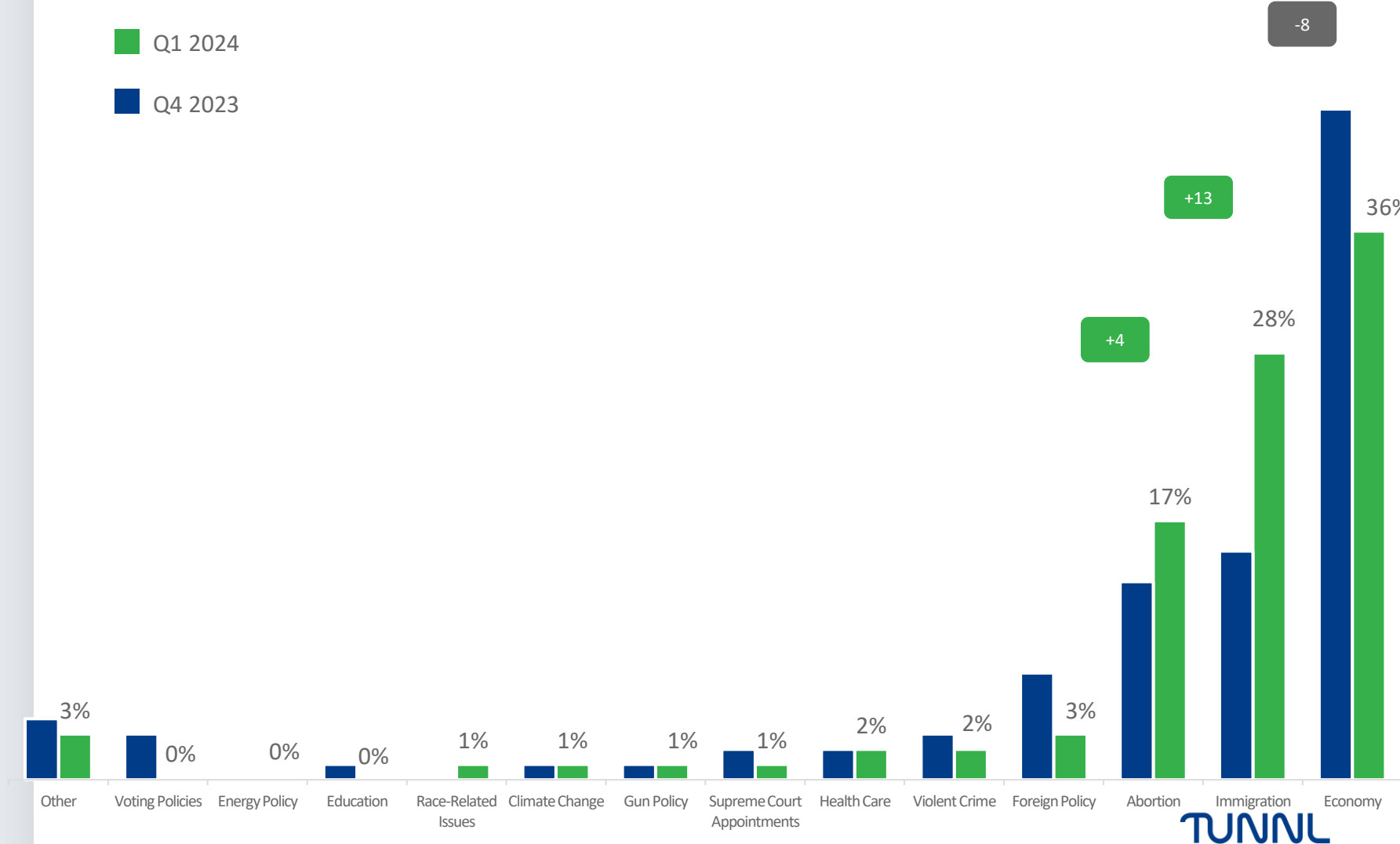


INDICATORS FOR POLITICS

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

Looking ahead to the 2024 election, the economy still holds the top spot for the most important issue for voters according to the U.S. Policy Opinion Makers. Immigration still holds the second spot; however, we saw a 13-point increase from last quarter.

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



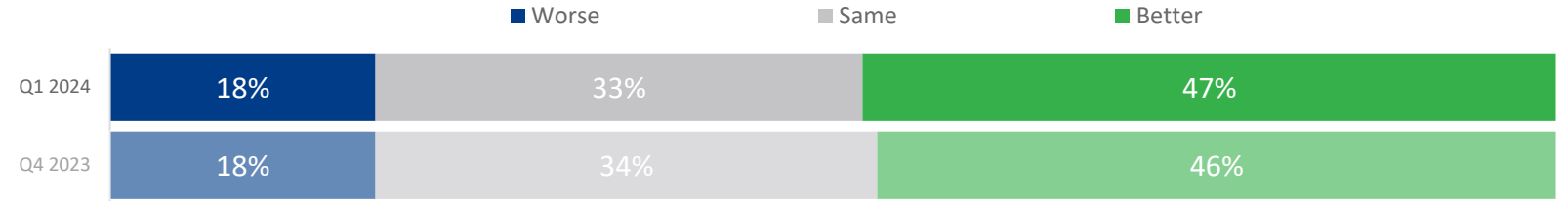
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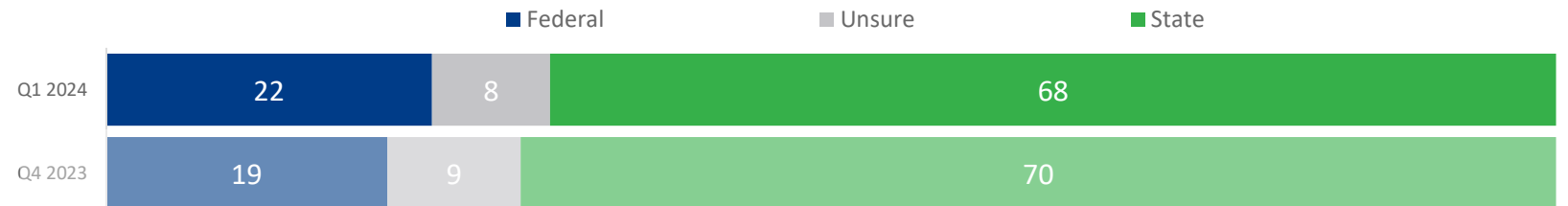
U.S. Policy Opinion Makers' views on the economic outlook in their state has been consistent for the entirety of 2023, with 80% saying the outlook is better than or the same in their state compared to the rest of the country.

This group also consistently asserts that their state government is more functional than the federal government.

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



WHO ARE THE

U.S. POLICY OPINION MAKERS

Tunnl's audience of 1.7 million U.S. 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.

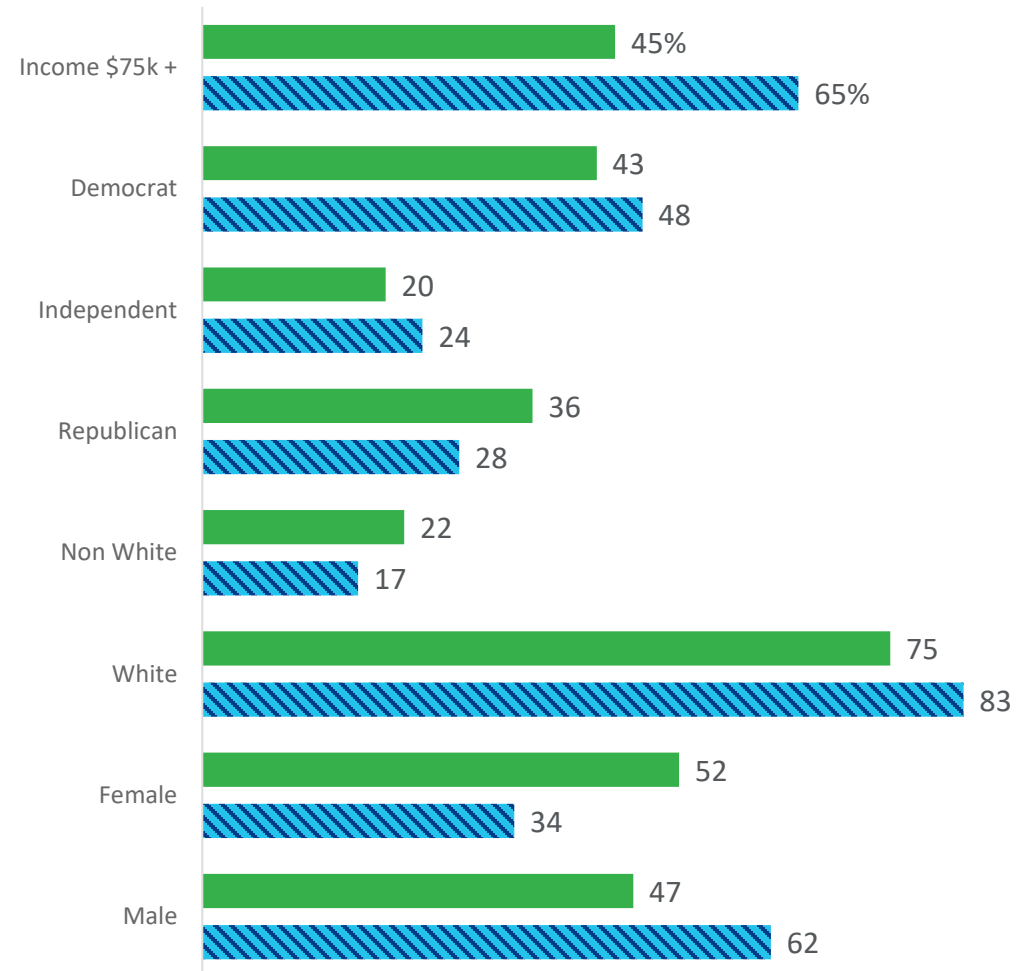


OVERVIEW

ABOUT THE AUDIENCE

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. U.S. Policy Opinion Makers are 62% male and 34% female and they are more likely to be a Democrat than the national average. Almost two-thirds of U.S. Policy Opinion Makers are high income earners.

Who is the U.S. Policy Opinion Makers Audience



 U.S. POLICY OPINION MAKERS

 NATIONAL AVG

WHO WE ARE

Tunnl is an audience insights provider with the mission of helping advertisers and agencies achieve maximum reach efficiency for their public affairs, advocacy, cause, or purpose-driven campaigns across any mix of media. Tunnl's audiences are based on how people feel about current issues and deliver in-depth demographic and media consumption insights, enabling users to get their campaigns in front of the people who care most about them—and not in front of those who don't. Access all of Tunnl's audiences, insights, and tools for custom audience building, analysis, planning, and measurement inside Tunnl's audience intelligence platform with direct integrations into DSPs and ad platforms.

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