

TO: Interested Parties

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RE: Democratic Messaging to Break Through on Affordability

Hart Research conducted a national survey of 2,529 voters from August 1 to 11, 2025 for Groundwork Action to identify economic messaging that more effectively positions Democratic candidates to win back working-class voters and addresses voters' demand for action on the affordability crisis. The survey was preceded and informed by in-depth qualitative research with working-class voters and swing voters.

In this memorandum, we outline key findings from the research and our strategic recommendations for Democrats' economic messaging.

Overview: The Democratic Party cannot succeed in the long run unless it reconnects with working-class voters, and it is clear that the party faces serious challenges on this front. Democrats significantly underperformed with working-class voters in 2024, and the party brand is underwater with them today.

Donald Trump's utter failure to address the high cost of living—and his pursuit of policies that will actually raise costs for working families—create important new opportunities for Democrats. But for Democrats to take advantage of Trump's failure, they must lean in affirmatively to affordability and deliver bold, forward-looking solutions that offer real change from the status quo. A populist economic message that is laser-focused on bringing down prices and confronts the outsized power of corporations and billionaires directly aligns with voters' most pressing concerns and resonates across both Democratic and Independent constituencies.

1. The erosion in working-class voters' support poses a serious challenge for Democrats.

- Exit polls indicate that, in 2024, Donald Trump narrowly won among voters with a household income under \$50,000 by two points (Trump 50%, Harris 48%). This was a notable shift towards the Republican compared to 2020, when Biden won by an 11-point margin, and 2016, when Clinton won by a 12-point margin.¹
- While both parties are currently underwater with voters, the Democratic Party (-19 net favorability) is viewed more unfavorably than both President Trump (-11 net favorability) and the Republican Party (-12 net favorability). Notably, the Democratic Party's image is decidedly negative among the key constituencies that have been central to its coalition: voters who identify as working class (-18 net favorability), non-college voters (-21 net favorability), and those with a household income below \$50,000 (-12 net favorability).
- More than one in six voters (17%) identify as former Democrats who have drifted from the party but are *not* strongly aligned with Republicans. These "target ex-Democrats" say they

¹ Source: Roper Center – CBS and CNN exit polls.

moved away from the Democratic Party because it is out of touch, not trustworthy, weak, ineffective, and lacks direction.

- Despite the real challenges that the Democratic Party is facing, the Democratic candidate holds a narrow three-point advantage in the generic Congressional trial heat (45% Democrat, 42% Republican, 14% undecided). Among target ex-Democrats, the Democratic candidate is down by just two points, though one in three are undecided: 32% Democrat, 34% Republican, 34% not sure.

Strategic Implication: The weakness of the Democratic brand with working-class voters poses a major problem for two key reasons. First, and most importantly, because it will be impossible to build a broad enough coalition capable of winning Senate races in key states, or of winning the electoral college, while increasingly being the party of college degree holders and those with household incomes over \$100,000. Second, it has sparked an identity crisis within the Democratic party which bills itself as the party of working-class people but is currently underperforming among those voters and losing more of them to Republicans.

2. Affordability is voters' top concern and should anchor Democrats' message.

- Any winning strategy for Democrats to rebuild a strong coalition that includes working-class voters must prioritize tackling high costs and the challenges that people face affording the basics.
- The rising costs of basics like groceries, housing, and healthcare which are making life unaffordable is by far voters' biggest concern of the 16 problems we tested (70% very big problem). Affordability is the issue that drives our politics today and dominates voters' lives, and it would be political malpractice if affordability is not the point of departure for both the policies and messaging of Democrats and progressives.

Strategic Implication: Trump has obviously given Democrats an opening here, with price increases caused by his tariffs and his budget bill that slashed healthcare for working people while giving millionaires and corporations big tax breaks. Just expressing concerns about high prices and opposing Trump's policies will not be enough, however. Voters are looking for proactive solutions to bring down prices and improve their lives.

3. Voters are eager for a Democrat to offer a fresh voice, new ideas, and a clear break from the status quo to tackle the affordability crisis.

- Democratic candidates have a two-part assignment: they must be laser-focused on advancing policies to lower everyday costs, while also positioning themselves as fresh voices ready to challenge a broken system. Democrats need to choose their battles wisely to show they are not complacent but are actively fighting to ease the cost-of-living struggle that working people face daily.
- In qualitative discussions, swing voters and working-class voters were clear in articulating their desire for fresh approaches in the Democratic Party to offer new solutions for lowering prices and reducing the outsized influence of corporations and the ultra-wealthy over our government.
- Voters express contempt for political gridlock in Washington and are looking for leaders who will shake things up and work to fix our broken political system to deliver real results. We tested the appeal of 10 different types of Democratic candidates, and a common-sense Democrat (53%) is most appealing, followed by a "Get Things Done" Democrat (40%) and a "People Over Profits" Democrat (36%).

Strategic Implication: Our advice to Democratic candidates is to embrace the mantle of change and to demonstrate a willingness to shake up the status quo rather than defend it, including by challenging their own party when necessary.

4. **Rebuilding the middle class through an Abundance-style focus on cutting red tape has some appeal, but it is seen as less responsive to voters' affordability concerns and has less appeal than a populist economic message.**

- In qualitative discussions, the goal of rebuilding the middle class strongly resonates with swing and working-class voters, especially when it recognizes the value of hard work and taps into the palpable desire for economic stability and security. Voters have witnessed the shrinking of the middle class amid rising income inequality, and they laud the goal of building a thriving middle class.
- To better understand how to engage working-class voters, and in light of the discourse that has dominated conversations within the Democratic Party in recent months, we tested two economic messaging frames: a) an Abundance-style approach focused on increasing the supply of essential needs by cutting red tape; and b) a populist-style approach centered on cracking down on corporate price gouging and undue political influence and economic fairness.²

[Abundance] The solution to grow the middle class is not to argue over who gets the last slice of pie, but to make the pie bigger so there's enough to go around for everyone. In order to do this, we should focus on:

- Increasing the supply of basic needs—including housing, clean energy, and public transportation--by cutting endless government red tape
- Rolling back outdated environmental and labor standards
- Unleashing the private sector to build more housing quickly and cheaply

[Populist] When we take on the corrupt system and politicians that put the interests of large corporations and billionaire CEOs ahead of everyone else, we can put power back in the hands of working Americans. In order to do this, we should focus on:

- Cracking down on price gouging that raises costs on families
- Reducing the power of corporate lobbyists
- Making sure the wealthy finally pay their fair share

- Nearly half of voters (46%) find an Abundance-style approach highly appealing (rating of 8, 9, or 10 on a 0-to-10 scale), including similar shares of Republicans (45%) and Democrats (49%), as well as working-class voters (48%).
- But the problems of red tape and excess regulation are not the most urgent ones in the minds of voters.
 - Voters think that rising costs (70% very big problem), political divisions (66% very big problem), and government prioritizing the interests of billionaires and corporations over the average American (56% very big problem) are notably bigger problems than too much bureaucratic red tape making it harder and more costly to get things done (38% very big problem).

² We did not use the terms "Abundance" or "populism" in describing these approaches - nor would we recommend doing so on the stump, as these terms are unknown and/or confusing to voters. We are using these terms here only as internal shorthand to identify the two economic messaging frameworks we tested with voters.

- Voters who think there is a shortage of things we need (47% very big problem) cite rising costs, greed, and wealth concentration as reasons for this shortage over government bureaucracy or red tape.
- Voters who think it takes too long for government to get things done (50% very big problem) blame political gridlock and entrenched partisanship more than government bureaucracy and red tape.
- Most importantly, voters see Abundance-style policy solutions as less responsive to the affordability problem.
 - Voters think by a two-to-one margin that cracking down on price gouging (60%) will address the high cost of living more than cutting red tape and regulation will (30%).
 - They also view cracking down on corporate landlords as the most effective way to bring down housing prices (60%) – well ahead of Abundance-style solutions of reducing red tape and regulations (38%) or overriding NIMBY zoning codes that prevent development of affordable housing (17%).

Strategic Implication: While an Abundance-style message and approach does advance some fresh ideas that challenge the status quo, there are significant questions about whether a focus on it in political messaging adequately meets the moment Democrats face today. There may be advantages to reforming permitting processes, fixing outdated regulations, or removing unnecessary red tape, but an Abundance-style approach does not clearly or sufficiently respond to voters' demands for real action to bring down costs with solutions that voters expect to make a real difference.

5. A populist economic message focused on taking on the undue influence of billionaires and big corporations has stronger and broader appeal with voters.

- Importantly, a populist message is focused on what voters think is the bigger problem with government today. In a head-to-head test, voters say by 63% to 37% that government prioritizing the interests of billionaires and big corporations over average Americans is a bigger problem than government moving too slowly and inefficiently, with too much red tape and regulations. Fully 85% of Democrats, 63% of Independents, and even 41% of Republicans believe that the outsized power of billionaires and corporations is the bigger problem.
- Nearly two in three voters (64%) find a populist approach to rebuilding the middle class highly appealing (rating of 8, 9, or 10 on a 0-to-10 scale) – 18 points higher than for an Abundance-style solution. This is because it is notably more appealing to Democrats (+33 populist) and Independents (+23 populist).
- When asked to choose which one of the two approaches they think is better for rebuilding the middle class, voters choose the populist solution over the Abundance-style solution by 59% to 41%. All subgroups except Republicans prefer the populist solution over the Abundance-style solution. Importantly, Democrats prefer the populist solution by 42 points and Independents prefer it by 20 points. Working-class voters also prefer it by a wide 26-point margin.

Strategic Implication: Democrats will be in a strong place that is responsive to voters' concerns about affordability by advancing a populist-style approach aimed at cracking down on corporate price gouging and undue political influence and advancing economic fairness.

6. The Bottom Line: While there are elements of the Abundance agenda that have appeal, and the choice on which messages to deliver is not zero-sum, a populist economic approach better solves for Democrats' challenges with working-class voters and other key groups of target voters across the electorate.

In recent months, we have observed a rivalry of sorts take root between the supporters of the Abundance movement on the one hand and those who favor a more populist economic approach on the other. Some voices have described the two camps as dueling political "factions" vying for preeminence in the Democratic party. Based on our work, we think treating these two frameworks as grounds for a zero-sum battle would be a mistake.

First, these approaches do not seem incompatible from a policy standpoint. As an approach to governing, it may make a great deal of sense for Democratic officeholders to reform permitting processes in order to deliver results faster.

There is also room for both viewpoints in candidates' political messaging: even the most populist of candidates should obviously support eliminating excess red tape where it exists. And voicing some criticism of the slowness to get things done in blue states can be helpful in showing that Democratic candidates are willing to call out their own party when appropriate and have the kind of "get things done" mentality that voters value.

But if candidates are asking which focus deserves topmost billing in Democrats' campaign messaging, the answer is clear: though some voters believe excessive bureaucracy can be a problem, it ranks far behind other concerns and tackling it does not strike voters as a direct response to the problem of affordability. Majorities of Democrats and Independents and two in five Republicans believe the outsized power of billionaires and corporations in our government is a bigger problem than red tape and bureaucracy. Moreover, voters – especially Democrats and Independents – believe cracking down on price gouging is a much more effective way to bring down prices than trying to get rid of red tape and regulations.

Methodology

Hart Research conducted a national survey among 2,529 voters on behalf of Groundwork Action from August 1 to 11, 2025. The survey was conducted online, and respondents were registered U.S. voters matched to the voter file. The credibility interval is ± 1.95 percentage points for the full sample, with higher tolerances for subgroups.

The survey was preceded and informed by two online discussions that were conducted July 9 to 12, 2025 – one among 30 working-class voters and one among 30 suburban and exurban swing voters.