

Key Takeaways

Survey data for this research includes 18,626 responses collected via online web panel from April 11-13, 2025 across 3 surveys.

- The data suggests President Trump may have won a battle in mitigating public backlash against tariffs, but is losing the war on high costs.
- Trump's approval rating on handling the cost of living is just 43%, down 3 points in 2 weeks, and 6 points from its peak.
 - 77% of voters think Trump's policies (not just tariffs) will raise their costs, 5 points *higher* than it was following his initial tariff rollout.
- To this point, the highest testing message of newly tested (in the 99th percentile on Trump disapproval) states Trump is **"not doing what the American people elected him to do. Trump ran on making life more affordable, but his tariffs are doing the opposite** – raising prices on everything from food to clothing to household goods."
- The opportunity here for Democrats appears more fundamental than scoring points on implementation blunders and individual pain points.
 - Voters appear increasingly skeptical that Trump is taking the right steps on the cost of living.
 - Cost of living is an issue that is both an overarching concern, and, for many, the reason why they supported Trump in the first place.
 - Especially when combined with Trump's unpopular budget, there is a clear case to be made that Trump is actively making economic life worse for the working people who were counting on him making it better.

Tariff Messaging DOs

DO:

- Focus on tariffs as a source of **higher costs across the board**
- Connect Trump's tariffs to a **broader economic agenda** that is making life worse for working people
- Frame raising costs as **Trump doing the opposite of what he was elected to do**

Top testing messages on tariffs:

- **Trump's not doing what the American people elected him to do.** *Trump ran on making life more affordable, but his tariffs are doing the opposite – raising prices on everything from food to clothing to household goods. Families already struggle to make ends meet, and these tariffs are a national sales tax that will make it harder for working Americans to support their families. This wasn't what millions of people voted for. (99th percentile)*
- **Trump's economic policies are making life worse for working families and seniors.** *Trump's tariffs will mean higher prices on basics like gas and groceries. And his budget cuts will take away earned benefits like Social Security, Medicaid and Medicare – benefits Trump calls “entitlements” – to pay for massive tax cuts for the wealthy and big corporations. It is a one-two punch that will make life worse for millions of Americans. (100th percentile – from previous test)*
- **Trump's new tariffs will push prices higher on everyday goods.** *Middle and working-class Americans are already feeling the pinch – paying more for essentials like groceries, clothes, and electronics, just to support their families. This isn't a tax on other countries: it's a tax on the American people. (98th percentile – from previous test)*
- **Trump's tariff policies will cause significant price increases.** *Economists project 15-20% increases across thousands of everyday items – when American families already struggle to make ends meet. Even Republicans in Congress warn these increases will be substantial and painful for American consumers. (94th percentile)*

Voters overwhelmingly see the cost of living and inflation as the most important issues facing America; even at this moment, stock market volatility and democracy are far lower priorities

Which of these two issues is the more important issue facing America today?	Overall	2024 Vote Choice: Harris	2024 Vote Choice: Trump	Swing 2020 x 2024: Swing	2024 Vote Choice: Did not vote
Cost of living	73%	71%	74%	72%	74%
Inflation	62%	59%	64%	62%	64%
Social Security	56%	58%	55%	57%	56%
Health Care	55%	57%	53%	56%	56%
Tariffs and International Trade	55%	58%	52%	55%	55%
Government Corruption	55%	54%	56%	55%	54%
Medicare	46%	51%	41%	46%	46%
The Budget Deficit And Government Debt	44%	36%	54%	44%	43%
Housing	43%	43%	42%	42%	47%
National Security and Foreign Policy	42%	35%	51%	42%	40%
American Ideals like Democracy and the Constitution	42%	49%	36%	43%	39%
Stock market volatility	27%	29%	25%	26%	26%

Trump's job approval has not plummeted post-tariffs, but it has continued to tick down; approval on cost of living shows more significant short-term decline

Metric	Two-way Topline	Summary	Difference From April 1	Difference From Peak
Trump Approval	47%	of voters approve of the job Trump has been doing in office	-1%	-3%
Trump Approval: Economy	44%	of voters approve of the job Trump has been doing on the economy	-1%	-8%
Trump Approval: Cost Of Living	43%	of voters approve of the job Trump has been doing on the cost of living	-3%	-6%

A majority of voters approve of Trump's announced changes to his tariff policy, a reflection of the unpopularity of the original plan

As you may know, this week President Trump announced changes to his tariff policy. Based on what you know, do you approve or disapprove of the changes President Trump made to his tariff policies this week?

Response	Overall	2024 Vote: Harris	2020 x 2024 Vote: Swing	2024 Vote: Trump	2024 Vote: Did Not Vote
Strongly approve	22%	4%	18%	39%	14%
Somewhat approve	30%	19%	35%	40%	24%
Somewhat disapprove	8%	11%	9%	5%	13%
Strongly disapprove	24%	47%	14%	2%	22%
Not sure	17%	20%	23%	14%	26%

52% of voters, including 53% of Swing voters, approve of Trump's changes to his tariff policies implemented last week.

Likely as a result of changes, approval of Trump's tariff policy improved from -13 to -7, but intensity of disapproval is unchanged

4/14 - Based on what you know, do you approve or disapprove of President Trump's tariff policy?

Approval of Trump's tariff policy is up 6 points.

Disapproval remains unchanged, with approval gains coming at the expense of a smaller pool of "not sure" responses.

Response	Overall	2024 Vote: Harris	2020 x 2024 Vote: Swing	2024 Vote: Trump	2024 Vote: Did Not Vote
Strongly approve	23%	2%	18%	44%	17%
Somewhat approve	21%	4%	29%	37%	21%
Somewhat disapprove	9%	8%	16%	9%	16%
Strongly disapprove	42%	83%	29%	2%	31%
Not sure	5%	3%	9%	7%	16%

4/03 - Based on what you know, do you approve or disapprove of President Trump's tariff policy?

Intensity remains on the negative side, with strong disapproval nearly twice as high as strong approval (42-23).

Response	Overall	2024 Vote: Harris	2020 x 2024 Vote: Swing	2024 Vote: Trump	2024 Vote: Did Not Vote
Strongly approve	17%	1%	10%	33%	14%
Somewhat approve	21%	3%	24%	39%	18%
Somewhat disapprove	10%	11%	16%	8%	15%
Strongly disapprove	41%	78%	31%	4%	30%
Not sure	11%	7%	19%	15%	23%

The share of voters who think Trump's *policies* - not just tariffs - will raise their costs is up 5 points to 77%

77% of voters, including 76% of Swing voters and 62% of Trump voters, think it's likely that Trump's policies will increase everyday costs for their family.

This is up from 72%, including 71% of Swing voters and 53% of Trump voters, a couple weeks ago.

How likely is it that President Trump's policies will increase everyday costs for you and your family?

Response	Overall	2024 Vote: Harris	2020 x 2024 Vote: Swing	2024 Vote: Trump	2024 Vote: Did Not Vote
Very likely	51%	87%	46%	16%	49%
Somewhat likely	26%	6%	30%	46%	21%
Not very likely	12%	2%	11%	23%	11%
Not at all likely	4%	3%	4%	5%	5%
Not sure	6%	2%	9%	11%	14%

4/03 - How likely is it that President Trump's policies will increase everyday costs for you and your family?

Response	Overall	2024 Vote: Harris	2020 x 2024 Vote: Swing	2024 Vote: Trump	2024 Vote: Did Not Vote
Very likely	48%	81%	42%	16%	40%
Somewhat likely	24%	11%	29%	37%	27%
Not very likely	13%	3%	12%	24%	10%
Not at all likely	3%	1%	3%	6%	4%
Not sure	11%	4%	13%	19%	19%

Voters perceive costs to have increased as a result of Trump's tariff policies and have acted on this perception

30% of voters made changes to their grocery order to lower costs, and 27% of voters avoided buying something because of high prices.

Though it's unlikely that costs have gone up as a result of tariffs yet, voters perceive increased costs as a result of these policies - indicating that Democrats should continue to focus on the increased costs as a result of tariffs.

Which of the following actions have you taken as a direct result of President Trump's tariff policy? Check all that apply.

Response	Overall	2024 Vote: Harris	2020 x 2024 Vote: Swing	2024 Vote: Trump	2024 Vote: Did Not Vote
Made changes to your grocery order to make it less expensive	30%	41%	26%	19%	25%
Avoided buying something you usually get because of high prices	27%	37%	23%	17%	28%
Researched how tariffs might affect your costs	22%	29%	21%	15%	18%
Checked your 401k or investment accounts more than usual	22%	29%	20%	14%	13%
Stocked up on everyday items before prices increased	18%	27%	16%	10%	14%
Sought out alternative products or brands that might be less affected by tariffs	17%	21%	16%	12%	18%
Heard from companies on how tariffs might affect your costs	15%	17%	14%	12%	12%
Purchased American-made products to avoid higher costs on imported goods	15%	11%	15%	19%	14%
Changed retirement or investment strategies in response to market volatility	8%	10%	9%	6%	6%
Contacted your elected representatives about tariff concerns	6%	10%	4%	2%	5%
Made a major purchase - such as buying a new car - before prices increased	4%	5%	4%	3%	5%
None of these	34%	23%	34%	46%	36%

Messages focused on higher costs for everyday goods as a result of tariffs are most effective at decreasing Trump approval

Name	Democrats say you should oppose Donald Trump because...	Trump Disapproval	Percentile*
Broken Promises - Tariffs	...he is not doing what the American people elected him to do. Trump ran on making life more affordable, but his tariffs are doing the opposite – raising prices on everything from food to clothing to household goods. Families already struggle to make ends meet, and these tariffs are a national sales tax that will make it harder for working Americans to support their families. This wasn't what millions of people voted for.	2.1%	99%
Tariffs - General Percentages	...his tariff policies will cause significant price increases. Economists project 15-20% increases across thousands of everyday items - when American families already struggle to make ends meet. Even Republicans in Congress warn these increases will be substantial and painful for American consumers.	1.9%	94%
Tariffs - General Dollars	...his tariff policies will cause significant price increases. Thousands of everyday items will cost more, leading to \$1500 more per year in costs for the average American family. Even Republicans in Congress warn these increases will be substantial and painful for American consumers.	1.8%	87%
Tariffs - Higher Prices, Fewer Jobs	...his tariffs are causing prices to soar, hurting families, and destroying American jobs. Trump's reckless trade wars raise the costs of everyday goods, forcing businesses to cut wages and lay off workers. Trump's tariffs mean working Americans pay more while earning less.	1.8%	87%
Tariffs - Percentage vs. Dollar Impact	...his tariff policies will make everyday necessities even more expensive. Trump's current plan for 10% tariffs will increase costs by about \$1,500 more per year for the average family. Even Republican budget analysts admit these costs will be passed directly to consumers.	1.6%	74%
Tariffs - Recession	...his tariff policy has brought America's economy to the brink of recession. Economists say the risk of recession in the US is significantly higher than it was just a few weeks ago, all because of Trump's tariff policy. Trump was elected to fix our economy, but he is doing the exact opposite and making things even worse with reckless and chaotic leadership.	1.6%	72%
Tariffs - Economic Democracy	...his tariffs undermine economic democracy by destabilizing our financial system. By arbitrarily imposing tariffs without Congressional approval, Trump is creating dangerous market volatility that hurts retirement accounts and threatens economic security. A democracy requires predictable rules, not chaotic decrees from one individual.	1.6%	71%
Tariffs - Eggs	...his tariff policies will make everyday necessities even more expensive. Economists say Trump's tariffs could increase egg prices by 30%, pushing costs from \$4 to over \$5 per dozen. When Americans are already struggling with high grocery bills, Trump's policies will only make weekly shopping more painful for families on tight budgets.	1.6%	70%
Broken Promises - Lowering Prices	...he's focused on anything but making Americans' lives better. During his campaign, Trump promised to lower everyday costs. Instead, he's focused on policies that don't actually affect anyone's lives, like renaming the Gulf of Mexico and making English the official language of the U.S. - all while hardworking Americans struggle to afford groceries.	1.5%	67%

*Percentile based on 355 messages tested since Trump's 2025 Inauguration