

TO: Interested Parties
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MEMO: **Lessons from NJ & VA: Democrats Must Help Americans Afford Food & Energy**
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Summary: Data from a post-election [survey](#) conducted by Upswing Research of voters in New Jersey and Virginia show how Democrats should rise to meet America's affordability crisis in the months ahead.

The research was designed to answer the question: **Which issues will help voters decide who to trust on the cost of living?** The lesson voters in New Jersey and Virginia have for national Democrats is that the party must increase its focus on groceries and utility bills heading into 2026.

In order to grow the battleground such as Democrats did in New Jersey and Virginia, Democrats running in 2026 must draw an explicit contrast with Republican policies that have increased the cost of groceries and utility bills. Housing and health care are important considerations for specific campaigns.

Overall, voters' most pressing concern remains how they are personally going to afford the basics, with **food and energy standing out as the affordability issues that will determine who voters trust in the midterm elections**.

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Key Findings

Governors-elect Mikie Sherrill (NJ) and Abigail Spanberger (VA) are more trusted on handling rising costs (D+24) than Democrats in Congress are (D+17). This pattern appears across affordability issues. For example, New Jersey voters trust Sherrill over her opponent Jack Ciattarelli by 18 points on the cost of housing (57-39), and Virginia voters trust Spanberger over her opponent Winsome Earle-Sears by 24 points on the cost of groceries and food (58-34). These same voters trust Democrats in Congress over Republicans by just 11 points on the cost of housing (52-41 in New Jersey) and 14 points on the cost of groceries and food (54-40 in Virginia). It is hard to deny these advantages contributed to their robust margins last week, presenting an opportunity that Democratic candidates for Congress should replicate next year.

Voters' most pressing concern remains how to afford the basics. Each household answers the question of what "the basics" are differently. Younger Americans 18–49 are more concerned about the cost of housing (44%) while Americans over 50 are more concerned about the cost of health care (50%) and utilities (51%). Groceries are the top concern across the board.

Upswing Research & Strategy conducted a survey among 1,200 voters who voted in the 2025 general election across the states of New Jersey and Virginia from November 4–6, 2025. The overall margin of error is +/- 2.8% at the 95 percent confidence interval while the margin of error in each state is +/- 4.0%. We conducted interviews using a web panel and SMS, also known as text to web, from a sample derived from a voter file.

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Groceries and utility bills rise to the top for the voters who are most likely to decide control of Congress in 2026. Food and energy costs stand out as a top concern with the infrequent voters (65% groceries and food, 45% utility bills and energy costs) and independent voters (56% groceries and food, 48% utility bills and energy costs) that Democrats must persuade to win big next year. Notably, these infrequent voters turned out to vote for Governors-elect Sherrill and Spanberger (62-37 and 64-36, respectively).

Health care is a more important concern among Democrats and older workers. Health care costs are more concerning for Democrats (65%), voters aged 40-64 (59%), those who are college educated (45%), and frequent voters (46%). These are critical groups that represent pillars of the Democratic coalition in a midterm election, but may not be enough in tough territory. As more Americans face higher premiums due to Republican's attack on the ACA, we should expect the salience of this concern to grow among these older, middle-class voters who are most likely to see large jumps in premium expenses.

Character traits show Democratic strength on competence and respect. Fitting with their historic victories, when voters in New Jersey and Virginia compare Governors-elect Sherrill and Spanberger to their opponents, they are seen as more competent and respectful of people's lives. When asked which candidate is better described as being "competent and can accomplish their goals," Sherrill is +13 and Spanberger +18. When asked who "respects your way of life," Sherrill is +15 and Spanberger is +16.

Strategic Recommendations

Food and energy are key for different reasons. Democrats' strategy on food should be across the board, while energy is critical with specific groups. Voters across the board rate food and groceries as their top cost-of-living concern. Nationally, neither party owns the topic. In New Jersey and Virginia, barely a majority of voters recall hearing the Democratic candidates addressing the cost of food and groceries (53%), while less than half recall hearing the Republican candidates talking about the issue (43%). Voters trust Governors-elect Sherrill and Spanberger on the cost of groceries by 23 points and trust Democrats in Congress by 15 points. Democrats should push this advantage. Meanwhile, Republicans face difficult terrain on the cost of living and are less trusted on all of the affordability concerns we tested. The only issue where Republicans overperform partisanship was on energy, where the advantage Democrats in Congress have is 3 points. Energy costs are a particular concern for typical persuasion targets and older voters. Sherrill and Spanberger effectively took control of the issue (D+12 on trust over utility costs), offering a roadmap for candidates to engage on this issue in order to win. Democratic leaders should craft distinct strategies on these two issues to help candidates win in 2026.

Democrats have an opportunity to expand the map with a focus on grocery prices. The fact that Republicans in Congress proactively threw away their ability to stop Trump's tariffs was a major misstep. Combined with their cuts to food assistance for Americans in need, voters are seeing Republicans as deeply out of touch on the cost of groceries. If Democrats can show they are focused on the basics Americans need to get by, they have an opportunity to expand the

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battleground. Not only do voters trust Democrats in Congress on groceries (D+15), this trust is driven by critical voters that Democrats have struggled to reach such as young men (+22), infrequent voters (+24) and Independent voters (+18).

Attacking on high utility bills and clean energy cuts is critical; ignoring energy and utilities is a mistake that could cost candidates. In the big conversation about the cost of living, energy is where Republicans will attack. Strategies that pretend Democrats can minimize the salience of the issue by ignoring it rely on an outdated understanding of our media environment and should be dismissed. Energy costs will rise next year and are a top issue for voters Democrats can win. Governors-elect Sherrill and Spanberger demonstrated this last week. Winning campaigns in the battleground will copy their approach to turn the table on Republican attacks that are sure to come. Going on offense on energy is how to slam shut Republicans' only way to contest who to trust on the cost of living. Attacking rising utility prices in earned media is a winning strategy to take control of the issue and keep pressing a Democratic advantage on affordability. There is plenty of progress that can be made with groups such as seniors (D-1), Hispanic voters (D+4), and noncollege women (D+6) to increase trust in Democrats just as Governors-elect Sherrill and Spanberger did this fall.

Candidates must have a vision on utility prices. Nationally, Democrats and outside organizations have an opportunity to change the battleground with an earned media strategy over the winter. The winning recipe for campaigns starts with attacking high utility costs due to Republican policies like cuts to clean energy. Candidates should develop ideas that contrast with Republicans by generating new energy (wind and solar are fast and cheap) and lower costs for consumers and those on fixed incomes. However, there is significant work elected officials and outside organizations can do to move the battleground in Democrats' favor. This issue does not need to be left to campaigns. Looking at the media habits of the voters who rate utility costs as a top concern reveals they are less likely to use nontraditional platforms such as Instagram (6 points less likely) and more likely to watch cable news (10 points more likely). An earned media strategy targeting local broadcast and cable should be explored and will reap benefits across the battleground.

Focus on housing to reach Black and Hispanic voters and voters under 40. These groups of voters disproportionately rate housing as a top concern. Targeting communication to them has the potential to yield significant dividends. While grocery prices are concerning across the board, younger voters lean toward housing as their next highest concern, and older voters focus on utility costs. Accordingly, Democrats can prioritize earned media, paid efforts, and traditional news sources on energy while aggressively pursuing nontraditional channels to describe their agenda on housing.

Increasing the salience of health care is important, but Democrats need to focus on harnessing organic anger on other topics. Democratic candidates are slightly more trusted on health care than on other cost-of-living concerns (53%), but strategists should have a clear-eyed view of their ability to increase the salience of the issue. A group of reliable, college-educated middle-class voters are primed to be angry at Republicans for doubling their premiums. Democrats must harness this energy and win these voters, without mistaking the salience of health care for other voters who face different economic pressures. In order to compete in tough territory, candidates will need to establish strength on additional cost-of-living concerns for voters who care more about food and energy.