Relevance Report
2020 Political Edition
Setting the Stage

Is everything political? When it comes to a US Presidential Election year, the answer might just be yes.

Consumers are being inundated with political messaging across the media they consume daily. 92,000 presidential campaign ads aired on television nationwide in the third week of February of this year alone.

With heightened political tension over the past several years, the 2016 Presidential and 2018 Midterm Elections saw political ad spend increase significantly. eMarketer forecasts 2020 total ad spend to be nearly 60% higher than it was in 2016.

To navigate a hyper politicized environment, Xandr sought to conduct research on the state of political advertising with three main objectives in mind:

- Understand voter attitudes toward politics and political advertising.
- Identify the current challenges in reaching voters with an ad that resonates.
- Determine the ways in which we as brands and agencies can improve voters’ experience with political ads.

This report details insights from a high-level discussion with political marketers in D.C., consumer focus groups, conducted nationwide and an online survey of 1,000 voters and prospective voters.

What we found is that a political ad can be an effective tool to spur a voter to consider a candidate. The caveat? It should create trust and relevancy for consumers.
Methodology

In November 2019, Xandr partnered with Advertiser Perceptions to host a select group of senior-level political marketing decision-makers for a 90-minute roundtable discussion in Washington D.C.

In January 2020, Xandr worked with research and analytics firm, MarketCast, to conduct three 90-minute focus groups among 15 total Republican, Democrat, and Independent voters across the United States and between the ages of 18-54.

Xandr also partnered with MarketCast on a 20-minute online survey of 1,000 current voters and prospective voters, ages 18+.

Questionnaire respondents

<table>
<thead>
<tr>
<th>Party</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Republicans</td>
<td>289</td>
</tr>
<tr>
<td>Democrats</td>
<td>293</td>
</tr>
<tr>
<td>Independents</td>
<td>398</td>
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Understand attitudes toward politics and political advertising.
The 2020 Political Landscape

‘Polarized.’ It’s the word most used by respondents when describing the current political environment. In fact, four in five registered or prospective voters say that politics is more polarizing than ever before. The intense opposition between political parties is felt by marketers and consumers alike but affects each cohort differently.

For D.C. marketing strategists, polarization has led to their refocus on state-level politics. With so much standoff on Capitol Hill, legislative battles have stalled and there’s more action and money in political advertising at the state level. Given the extent to which the electorate is divided and fixed to their beliefs, marketing agendas have become less about moving voters and more about reinforcing or challenging perceptions.

The polarization acknowledged by voters nationwide does not necessarily translate into negative emotions about the election process. 74% say they are proud to live in the US. Roughly three in five are thinking positively about the 2020 Election, mainly because they feel empowered by their ability to vote. Polarization might be contributing, however, to a lack of confidence in the current political system, with 62% reporting that they feel restricted by the two-party model.

“The number of people to target is actually shrinking as politics becomes so fractured, there are fewer undecideds.”

Marketer

4 in 5 voters say that politics is more polarizing than ever before.

74% are proud to live in the US.

3 in 5 are thinking positively about the 2020 Election.
With planted positions dictating the political climate, it’s important to look at sentiment across party lines.

<table>
<thead>
<tr>
<th></th>
<th>Republicans</th>
<th>Democrats</th>
<th>Independents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling negative about the 2020 US Presidential Election</td>
<td>37%</td>
<td>30%</td>
<td>52%</td>
</tr>
<tr>
<td>Feeling positive about the 2020 US Presidential Election</td>
<td>63%</td>
<td>70%</td>
<td>48%</td>
</tr>
<tr>
<td>Political advertising needs to exist</td>
<td></td>
<td></td>
<td>85%</td>
</tr>
<tr>
<td>Political advertising is good for voters</td>
<td></td>
<td></td>
<td>78%</td>
</tr>
<tr>
<td>Pay attention to political ads</td>
<td></td>
<td></td>
<td>74%</td>
</tr>
<tr>
<td>Say political ads are a valuable resource for how they make their voting decisions</td>
<td></td>
<td></td>
<td>75%</td>
</tr>
</tbody>
</table>

**Top driver for those that feel positively**

- **59%** of Republicans feel confident about their party leadership.
- **51%** of Democrats say candidates are addressing the issues they care about.
- **51%** of Independents feel empowered by their ability to vote.

**Top driver for those that feel negatively**

- **70%** of Republicans distrust the media and reporting on the Election.
- **44%** of Democrats are upset by lack of bipartisanship.
- **51%** of Independents distrust the media and reporting on the Election.
Rules of Ad Engagement

While opinions of the news media differ across parties, there is a general trend in television news viewing that speaks to a slight preference for reporting over analysis and punditry. At least three in five eligible voters are tuning in to local and network news programming weekly. Not quite as many are switching on cable news. Democrats, the most trusting of the news media, are more likely cable news viewers than Republicans or Independents.

When they are watching television, whether news or other programming, most voters will engage with political ads that appear, meaning they will watch the ads all the way through. While television is the platform most likely to capture their attention, voters are generally receptive to political advertising across platforms. For Republicans and Democrats, there is over a 50% chance that on a weekly basis they will watch, read, or listen to political ads appearing on a platform with which they engage regularly.

1 Engage regularly = at least monthly engagement.
While Democrats are most likely to engage with political advertising, the majority of Republicans also see the value of and pay attention to political ads. Independent voters, however, present the greatest challenge for marketers—they are not aligned with either party, skew negative toward the 2020 Election, and are least likely to engage with political ads. While difficult to connect with, Independents are most likely to feel positively because they are empowered by their ability to vote, which indicates the influence of this group. They cannot be overlooked.

It is not impossible to reach an independent voter and get them to pay attention to an ad. Driving engagement is key because voters of all parties will act on political ads that they watch, read, or listen to.

60% say they have read more about the candidate or read more about the cause after being exposed to a political ad.

~1 in 3 voters have talked to their friends and family about what they’ve seen in a political ad.

“I try to educate myself based on issues that I’m passionate about. Instead of looking along the two-party lines, I’ll look at sources I trust... I’m more issue-based rather than party-based.”

Independent Voter
The Through Line Across Party Lines

There is a sentiment that unites the electorate and that’s a thirst for knowledge. Across parties, the overwhelming majority looks for opportunities to get informed.

Through education, voters are actively looking to ‘cross the aisle’ and alleviate the sense of being overwhelmed by polarization. Voters shared an openness to hearing from opposing parties and various viewpoints.

Conversations with registered and prospective voters also indicate that their Election decisions are reliant on their own independent research about candidates and causes, which presents the leading opportunity for marketers — ads can act as the catalyst for inspiring the research that voters conduct.

Today’s voters are empowered to use the resources available to them — news archives, campaign websites, social platforms, televised debates and town halls — to make informed decisions about choosing their political leaders. Ads are often the engine behind their decision-making journey.

75% are eager to learn more about different political views.

64% like spending their time researching different political candidates and issues.

70% agree that they need to learn more about 2020 Presidential candidates.

“Ads are just one of the tools of the whole campaign...I do my own research after.”

Democratic Voter

“Ads help steer the direction of my research because sometimes you don’t know how you should start.”

Republican Voter

“At the end of the day, I will be doing my own research to make my decision.”

Independent Voter
OBJECTIVE

Identify the current challenges in reaching voters with an ad that resonates.
Barriers to Ad Engagement

A negative ad experience can reflect badly on the candidate. There are several contributing factors to a negative ad experience.

After a negative ad experience...

48% will like the candidate less.

10% will like the party less.
Intrusiveness

Last year, through a nationwide online survey, Xandr discovered that consumers are not necessarily anti-advertising, they’re pro-content. Consumers prefer ad-supported experiences so long as the ads do not intrude on or obstruct the media with which they’re interacting. This holds true for political ads.

“Whenever I am watching TV, I am usually watching fantasy and I don’t want it to be interrupted by political ads.”

Republican Voter

71% dislike when ads/political ads obstruct the content with which they’re engaging whilst 79% dislike when political ads do the same. 63% say advertising makes media consumption less enjoyable compared to 72% for political advertising.

The solution for reducing intrusive ads comes down to meeting a voter at the right moment in time.
Frequency

In the 2019 survey, consumers made clear they do not want to see the same ad all the time. Eliminating intrusive ads and minimizing ad frequency were the two leading methods for improving a consumer’s ad experience.

“I watch the first time to see what they are talking about, but if it’s repetitive I wouldn’t watch it anymore.”

Democratic Voter

For political advertising, frequency is even more of a pain point. 75% say advertising has become more frequent lately with 87% of people saying the same for political advertising. 73% dislike seeing the same ads over and over again compared to 84% for political ads.

Solving for frequency is about sending the right message at the right time and not the same message all the time.

Given the nature of Election seasons, it is difficult to overcome perceptions of frequency completely. Marketers noted the challenge of cyclical ad budgets being dependent on major voting years. One voter shared the opinion that political ads appear so frequently before a Midterm or Presidential Election but will disappear entirely after the votes are in, and this calls the ads’ authenticity into question. This observation plays into voters’ lack of trust, the leading challenge to delivering a positive ad experience.

75% say advertising/political advertising has become more frequent lately.

73% 84%
dislike seeing the same ads/political ads over and over again.
Distrust

83% of voters say they find it difficult to trust what they see in political ads. Three in four say most political ads include fraudulent or fake information. One silver lining to this is that after seeing an ad, some voters investigate the candidate or cause with the express purpose of fact checking that ad.

When it comes to the sources they do trust for learning about political candidates, subscription news websites and live appearances of the candidate in debates, interviews and town halls, are considered the most accurate by 70% of voters.

Earning voters’ trust in a political ad can be accomplished. Voters trust ads that utilize unbiased reporting of data and statistics.

“ Ads are just one of the tools of the whole campaign. I don’t trust what they’re saying in 30 seconds...I do my own research after that.”

Democratic Voter

According to the survey, voters also trust ads that appear on television. One voter said television could be trusted because it’s a mass medium that presents a general message whereas social media is more tailored to the user.

D.C. media strategists said that they are being vigilant about hypertargeting this year after the 2016 Presidential Election saw an overreliance on exact targeting that largely missed undecideds and lapsed voters.

Still, one in four voters will trust ads that address topics important to his or her local community, which suggests the need for some degree of personalization. Voters will consider these ads more relevant and there is a strong correlation between trust and relevance.
Determine the ways in which we can improve voters’ experience with political ads.
Following the Recipe for Relevance

Voters offered actionable insights for delivering on relevance, which is key to political ad effectiveness. When an ad is relevant, it is more trusted and also more likely to get a voter to do research on the campaign or cause advertised.

Relevance =

1. Evokes an Emotion — 34%
   Has a positive tone.

2. Meet a Consumer Need — 34%
   Teaches me more about a candidate or issue.

3. Meet a Moment in Time — 33%
   Addresses timely topics in society.

“When it’s constantly bashing the other candidate, there’s no value. I don’t think there’s any benefit of that.”

Republican Voter
Step 1: Evoke a Positive Emotion

55% of voters feel angry, frustrated, worried, overwhelmed or stressed after engaging with a political ad. Feelings toward ads vary across political parties with Democrats the most hopeful but also the most worried. Republicans and Independents feel frustrated. Varying emotions speak to the polarization felt this Election year.

Proving the power of positivity, 31% rated removing political ads that are negative in tone or “attack-based” as the most effective method for improving political advertising. The second best method, with 19% rating it so, was reducing ad frequency. Furthermore, an ad that feels negative in tone is more likely than a negative ad experience (an experience that interrupts or is repetitive) to contribute to a voter’s liking the candidate less.
Step 2: Teach Something New

One in three voters considers an ad relevant if it teaches them more about a candidate or issue. And if an ad educates about politics, 30% of voters will consider it relevant and do more research on the candidate or cause advertised.

Across party lines, voters want to know more about 2020 Presidential Election candidates.

79% Democrats
61% Republicans
72% Independents

Including data and statistics in ad creative is a best practice. Not only are voters more likely to trust the ad but nearly two in five will do more research after seeing data about a candidate or cause. An ad’s ability to educate is vital to its success since voters often regard an ad as an invitation to explore a candidate or cause further. There is a strong correlation between ads that are relevant and ads that drive the voter to do more research.
Step 3: Meet a Moment in Time

Nearly a third of voters will do more research after seeing a relevant ad that addresses current political conversations. Some voters shared disdain for ads that delve into the past and explore the history of a candidate. Presenting a message that is timely is key to delivering on relevance, and driving voters’ independent research.

Another factor to meeting voters at the right time is understanding where they are in their decision-making journey. The window of opportunity to connect with voters and influence their decision is lengthy given that 71% of voters start their education on Presidential candidates prior to the party conventions. This varies across political affiliations, however.

Over half of Independent voters make their Election decision in the two months leading up to the General Election but they’re getting informed on candidates throughout the year. For party-aligned Democrats and Republicans, they’re starting their education and making their Election decisions more quickly.
CONCLUSION
Planning an Ad Campaign Victory

To win over the voter, a political ad campaign strategy should adopt a three-pronged approach for driving research, trust, and relevance.

**Step 1**

Lean in as the bridge between parties by generating positive emotions.

› Remember that Independent voters are the least likely to engage with political ads.

**Step 2**

Utilize television advertising with messaging that is timely and focused to the local community.

› Be aware of trust issues around social platforms.
› Avoid intrusiveness and frequency.

**Step 3**

Educate the voter by providing valuable, timely information that can contribute to or launch their decision-making journey.

› Data and statistics are key.
To provide voters with the knowledge they crave is the most crucial element for informing their decision-making well before the ballots are counted.