

Relevance Report

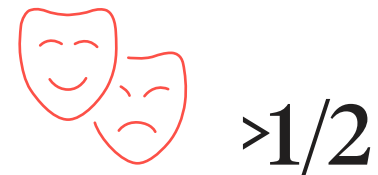
2020 Political Edition — Pre-Election Update

Introduction

Building on previous research conducted in January and April 2020, we set out to measure perceptions among eligible voters in a time of great uncertainty. We looked to determine changes in voter sentiment amid a global pandemic, social change, and the narrowing down of the pool of major party Presidential candidates.

What we learned is that voters consider political advertisements especially relevant today. Consistent with our initial findings, voters are eager to learn more about political issues and they turn to ads to stay informed.

In order to meet voters with a message that resonates, it is critical we understand the voter mindset.



Just over half of voters feel positively about the presidential election and nearly 9 in 10 agree that politics have never been more polarizing.



While two in three voters feel negatively about the economy and their confidence in leadership to navigate through the pandemic has declined, most voters still feel hopeful for the future.



Two thirds of voters feel like they have more time to do things than they had before the COVID-19 pandemic but self-reported media engagement has returned to pre-pandemic levels.



31% of decided voters said ads that made them feel hopeful were most likely to inform their decisions. While undecided voters want to see ads that address how a candidate will improve the economy before making their decisions.



During these unprecedented times, political ads and brand communications need to deliver on authenticity and relevance. This report offers a roadmap for reaching voters in the lead up to Election Day 2020.

Methodology

Xandr partnered with leading research and analytics firm, MarketCast, to conduct online surveys.

Sampling criteria

- › US consumers
- › Age 18+
- › Split evenly by gender
- › Must watch/listen to 5+ hours of content a week, from any source
- › Registered, considering or intending to register to vote for the upcoming 2020 United States presidential election
- › Evenly distributed across party lines

Wave 1

📅 Jan 23 – Jan 28 2020

🕒 20 minutes

👤 N=1,000

Wave 2

📅 Apr 9 – Apr 14 2020

🕒 15 minutes

👤 N=500

Wave 3

📅 Jul 28 – Aug 3 2020

🕒 20 minutes

👤 N=1,000

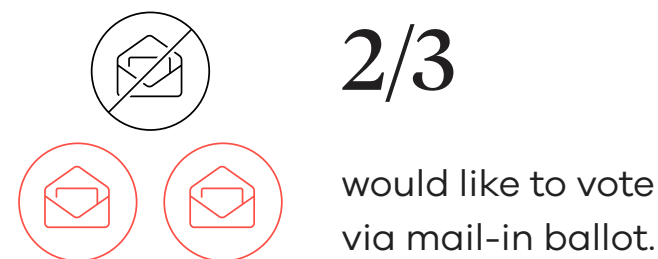
VOTER VIEWS

Voters Skew Positive Toward Election

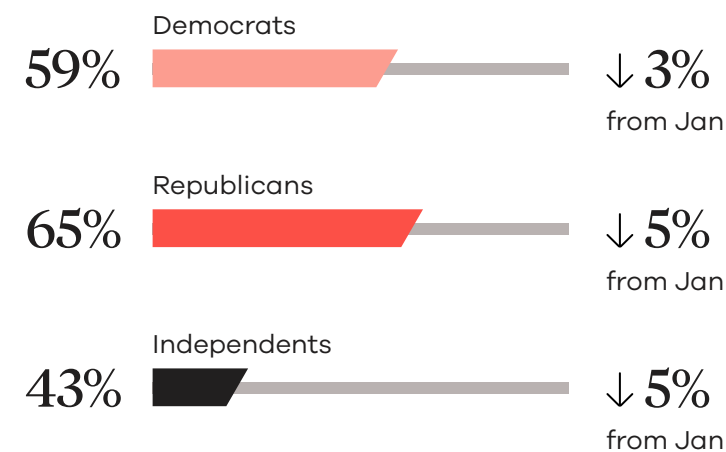
Empowered by their ability to vote, the majority of voters feel positively about the presidential election. Negative sentiment has risen slightly since January, driven by even more polarized politics. This is especially true for Independent voters, with over half feeling negatively.

Despite the continued polarization of issues, voters are not any more uncomfortable sharing their opinions than in past months. Democrats still report being the most engaged with politics compared to Republicans and Independents. Their level of engagement, however, has decreased since January when there were many more candidates campaigning for the Democratic Presidential nomination.

While 2 in 3 voters are very or extremely informed about the presidential election, the majority report being only somewhat informed about local and state elections. So there is a need for ads that educate on the candidates running and issues at stake in these elections.

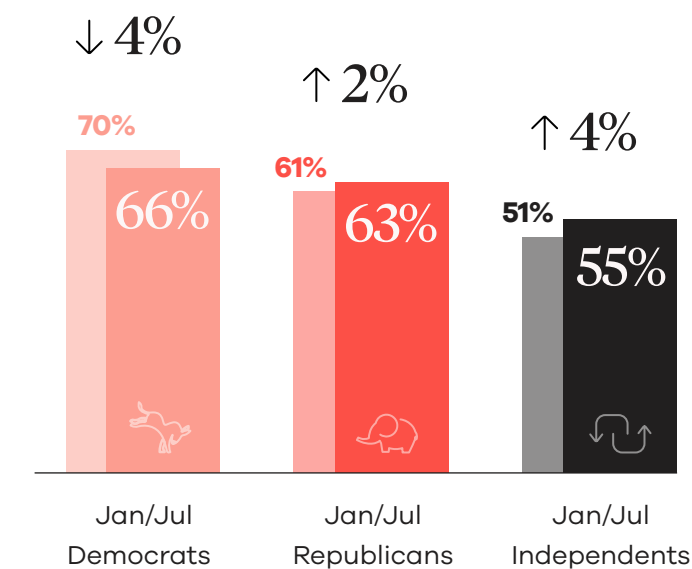


% that feel positively about the presidential election

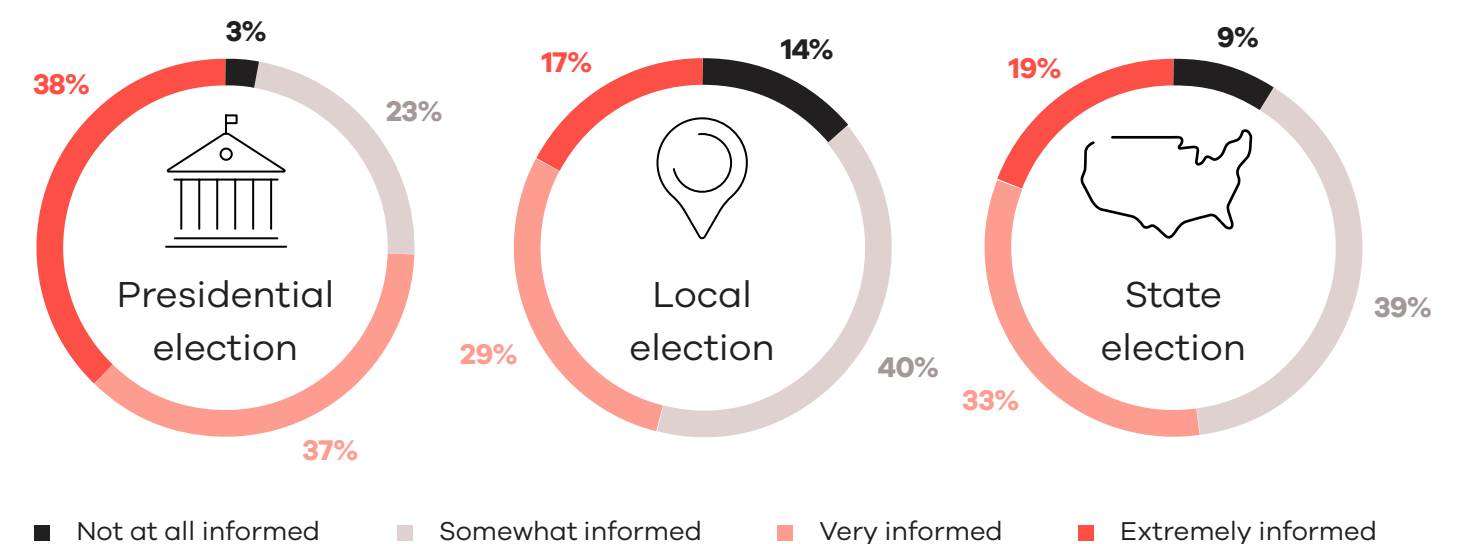


agree that politics have never been more polarizing.

% that are engaged with politics



% that feel informed about



VOTER VIEWS

Voters Skew Negative Toward Economy

Perceptions toward the economy have remained unchanged since the onset of the COVID-19 pandemic in April. Two thirds of voters report feeling negatively when considering the US economic outlook.

We do see a slight increase in positive perceptions among Independent voters in July possibly driven by the gradual re-opening of state and local economies.

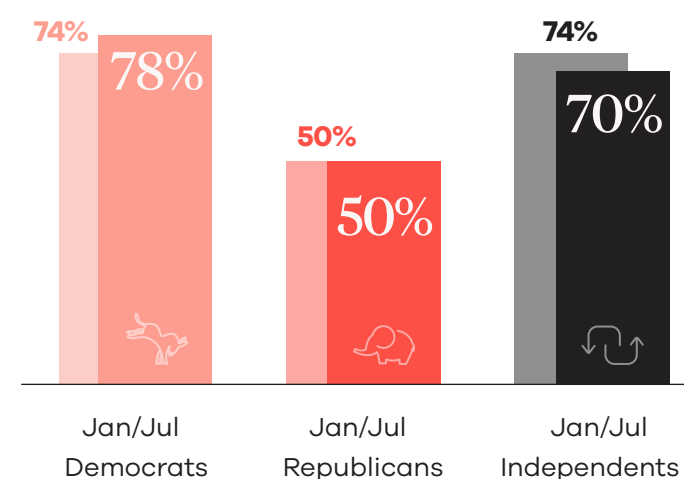
Confidence in leadership to navigate through the crisis has dropped significantly since April as have hope for the future and national pride. Despite such declines, over 60% of voters still report feeling hopeful and proud to live in the US.

2 in 3

voters feel negatively about the economy.

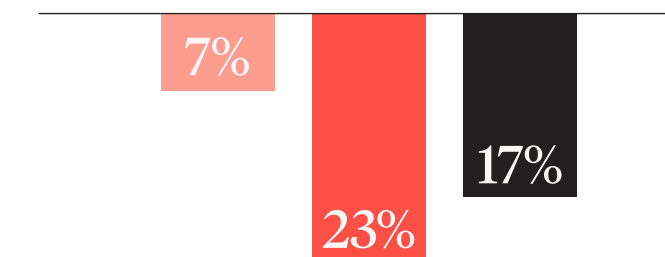


% that feels negatively about the economy

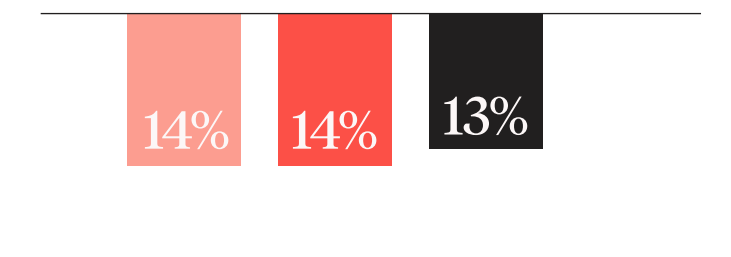


% decreases in confidences that...

State Leadership will get us through the COVID-19 crisis

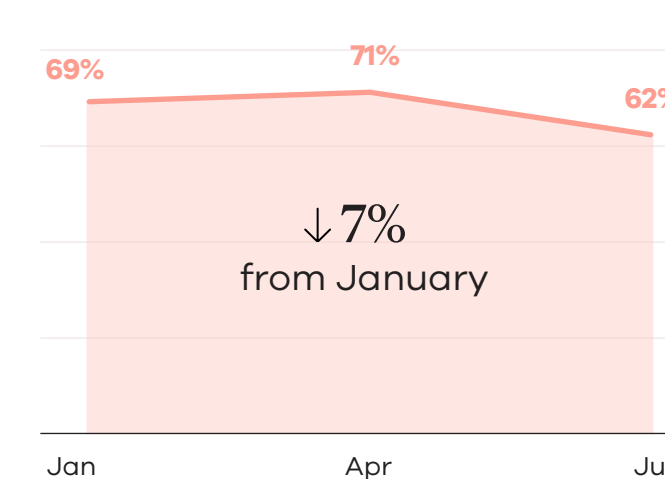


Federal Leadership will get us through the COVID-19 crisis

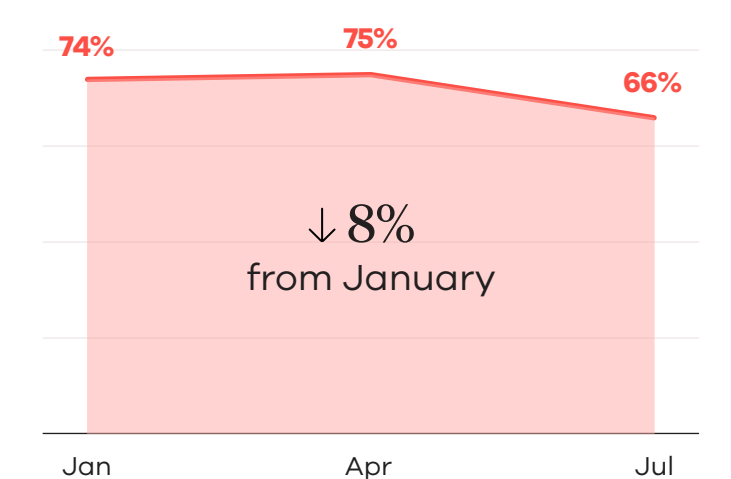


■ Democrats ■ Republicans ■ Independents

% that feel hopeful about what the future holds



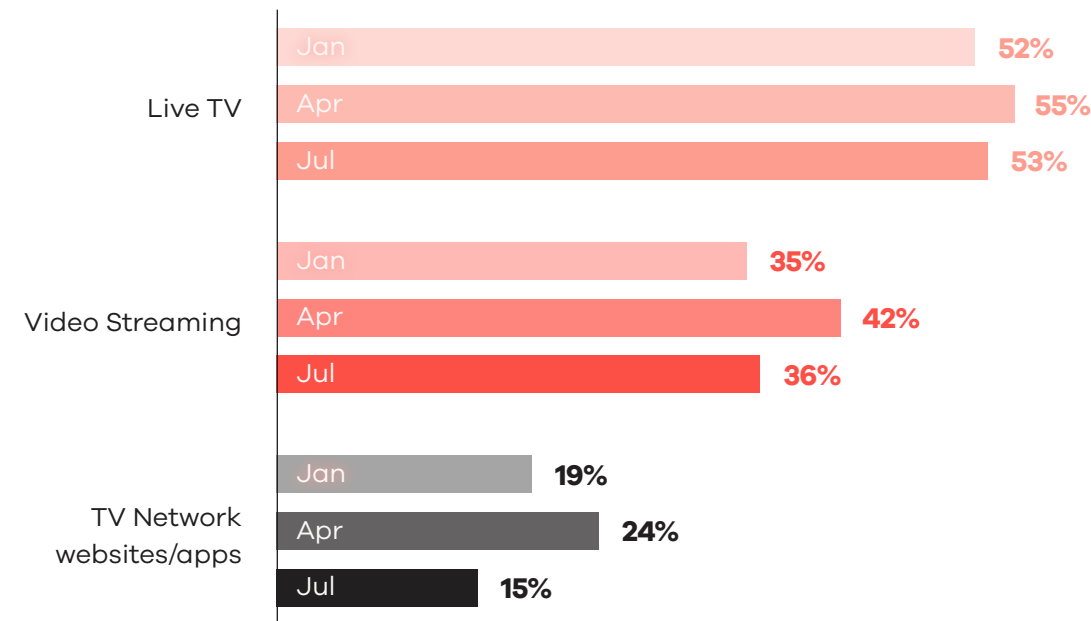
% that feels proud of the nation they live in



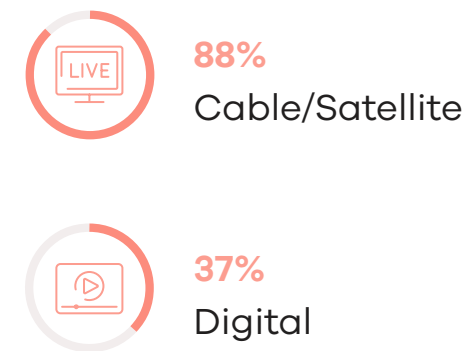
MEDIA ENGAGEMENT

Daily Video Use Returns to Pre-Pandemic Levels

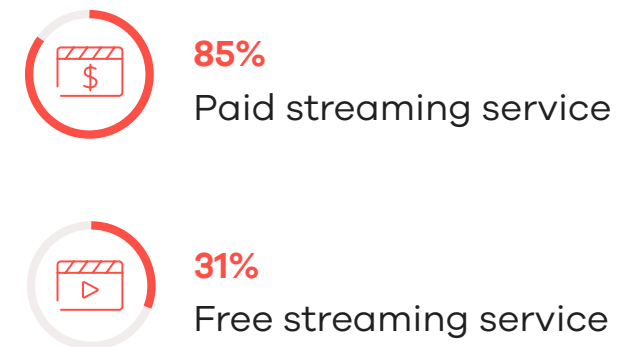
% watching, reading, or listening to at least daily



Live TV viewers watching via...

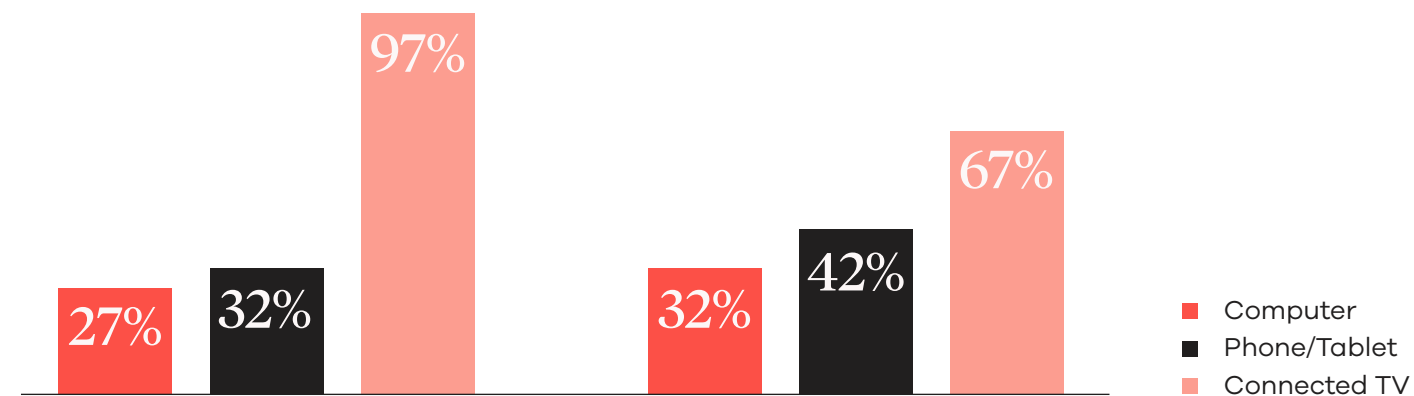


Video streaming users are watching TV shows/movies daily on...



How voters watch live TV delivered digitally

How voters watch content from TV network's websites/apps



With stay-at-home orders in effect this past April, voters reported having more time to do things. With this newfound time, they utilized a range of media platforms more often on a daily basis.

Since then, the frequency of their media engagement has returned to pre-COVID levels likely due to a relaxing of stay-at-home orders and phased re-openings.

Over the last seven months, live TV has seen the least fluctuation in daily use with the majority watching via their traditional cable or satellite subscription.

Of those streaming video daily, most are using paid streaming services and when it comes to accessing television content digitally, most are watching on their television sets.

MEDIA ENGAGEMENT

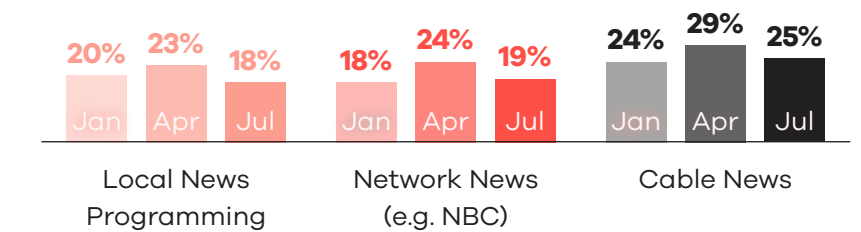
TV News Consumption Returns to Pre-Pandemic Norms

While two thirds of voters still report feeling overwhelmed by the news they hear day-to-day, they are watching less news on television than they were in April.

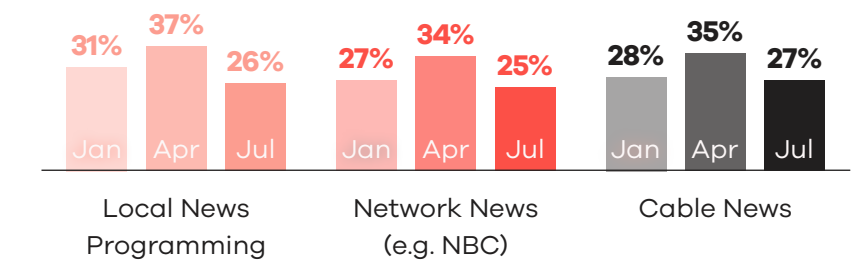
Daily and weekly news consumption has returned to pre-COVID levels as the initial outbreak has become the new normal and news fatigue kicks in for those initially eager for information back in April.

Cable news remains most popular among younger adults while those aged 45+ report watching local news programming most often.

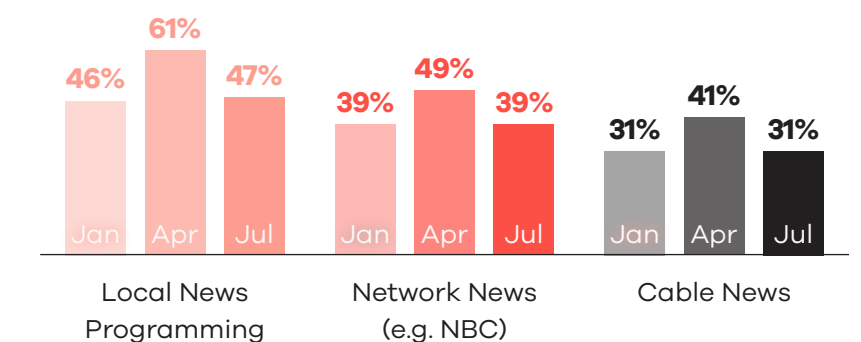
Watching daily — young adults (25 – 34)



Watching daily — adults (35 – 44)



Watching daily — adults (45+)



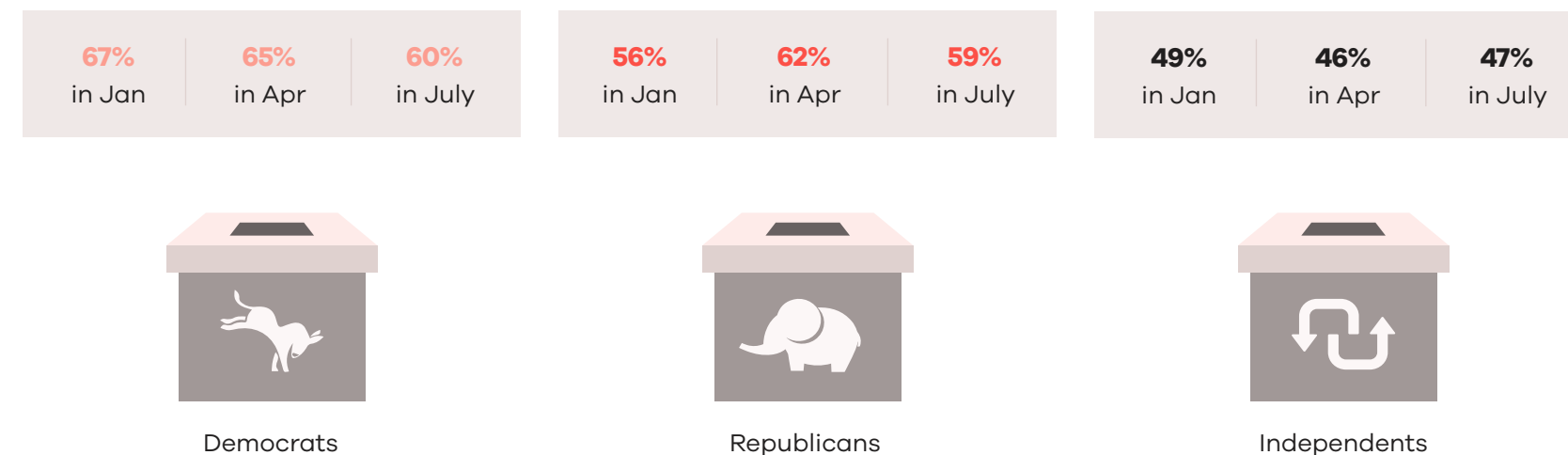
POLITICAL AD ENGAGEMENT

Voters are Most Receptive to Political Ads on TV

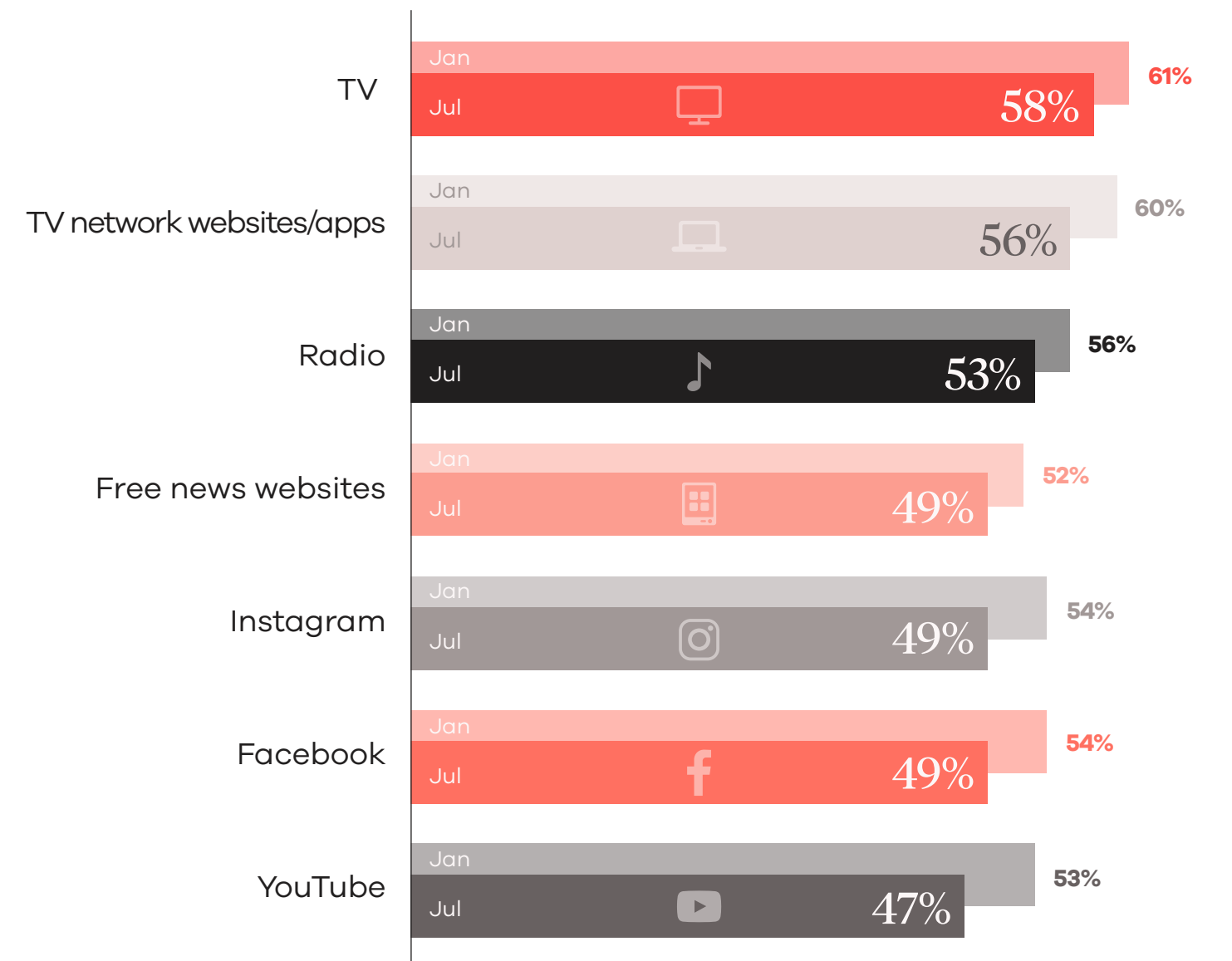
Over half of voters report watching ads on TV or TV network websites/apps at least weekly. We see slight decreases in reported weekly ad engagement since January, especially on social media platforms.

Still, the majority of Democratic and Republican voters say that they often pay attention to the political ads they see while independent voters remain the least receptive and most challenging to reach.

% that often pay attention to the political ads they see



At least weekly engagement with political ads on...



POLITICAL AD ENGAGEMENT

Political Ads are Especially Relevant to Voters Right Now

In the 100 days leading up to Election 2020, political ads are perceived as particularly relevant and important.

Most Democratic and Republican voters have made up their minds so far as whom they will be voting for but one in three Independent voters remain undecided over their choice for President. 42% have not made their state or local election voting decisions yet either.

Ads that inform and educate are especially important to independent voters

Independent voters, who are least receptive to political advertising and most likely to make their voting decisions closer to Election Day, report increased importance of ads that teach them about the candidate, cause, and key issues.

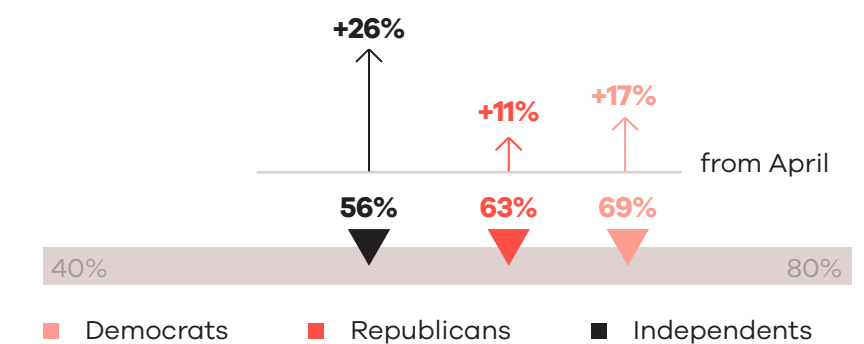
Voters undecided about the presidential election

Democrats — 13%
Republicans — 14%
Independents — 34%

Voters undecided about state/local elections

Democrats — 26%
Republicans — 24%
Independents — 42%

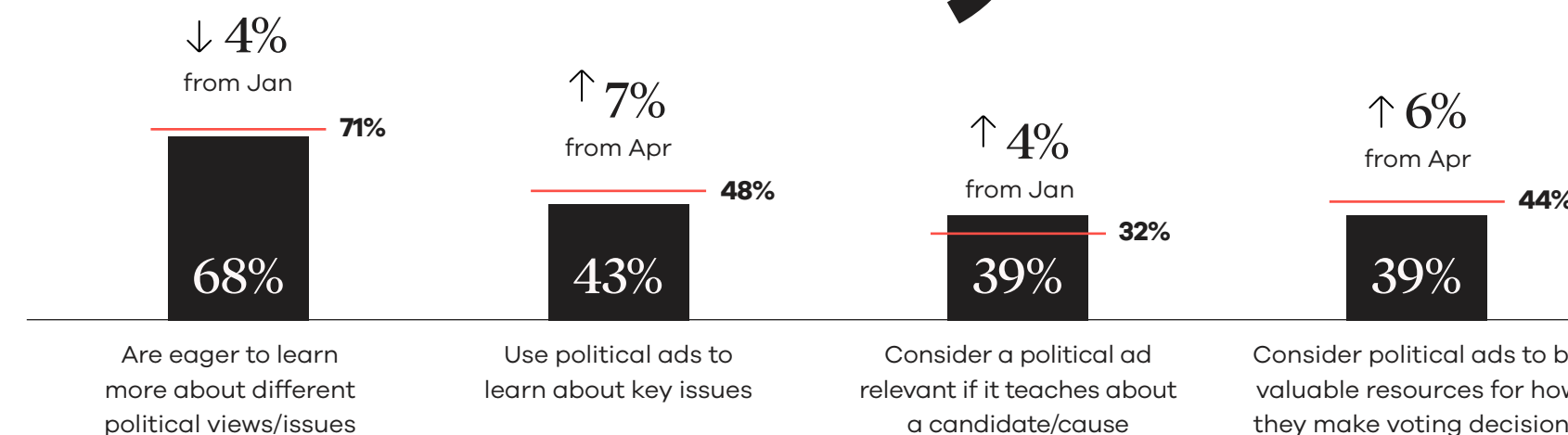
% voters considering political ads relevant right now



54%

of voters consider political ads more important now that there are only two candidates in the Presidential race.

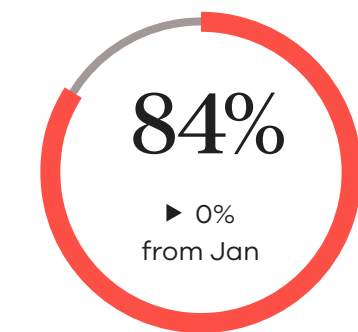
Among Independents



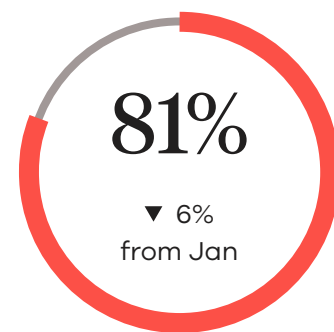
POLITICAL AD RELEVANCE

Reaching the Voter at the Right Time, With the Right Message

CHALLENGE: political ads appear too often



dislike seeing the same political ads over and over again



say political advertising has become more frequent lately



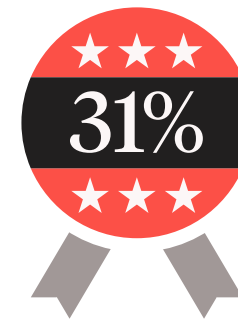
82%

say it is important that ads appear unbiased.



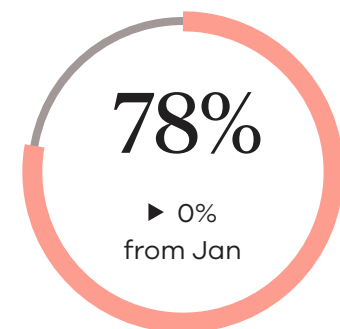
37%

will trust a political ad if it's unbiased.

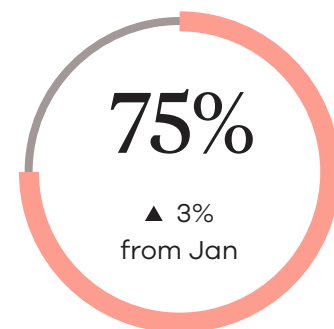


of decided voters say ads that made them feel hopeful helped finalize their voting decisions.

CHALLENGE: political ads interrupt time with media



dislike when political ads interrupt what I'm doing



say political ads make media consumption less enjoyable

42%

of undecided voters want to see ads that educate them on the economy

38%

say removing political "attack ads" would most improve their experience with ads

While voters perceive ads to be appearing less frequently than they were in January, ad frequency and intrusiveness are clear barriers to engaging with voters effectively.

Voters generally recognize the value of political advertising but political ads that appear too often and interrupt their time with media fail to deliver on relevance.

When it comes to delivering the right message, voters report it is most critical that ads appear unbiased. Ads addressing the economy and offering hope for the future are most likely to inform voting decisions.

BRAND COMMUNICATIONS

Relevance in an Age of Uncertainty

According to responses from voters nationwide, brands can deliver on relevance today by providing information about COVID-19 safety measures being taken and issuing authentic public statements in support of key issues like Black Lives Matter.

COVID-19

While most voters still care about brands' COVID-19-specific communications, they are viewed as less essential at this stage in the crisis by some. In regards to COVID-19, when brands offer relevant information and the voter learns something new, they establish positive connections with consumers.

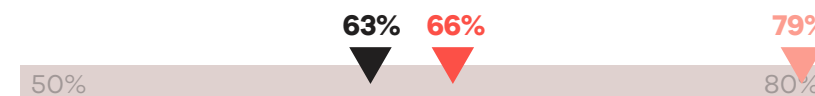
Black Lives Matter (BLM)

When it comes to communications specific to the Black Lives Matter movement, authenticity is the key sticking point for voters.

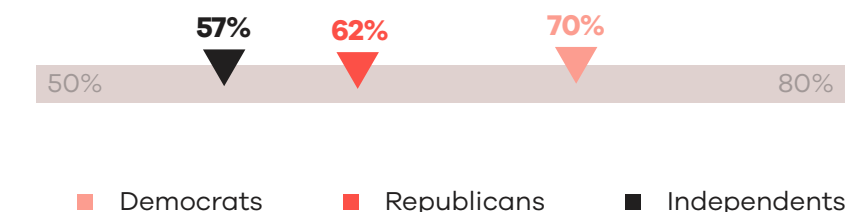
Preferred form of brand messaging

When brands tackle these issues, TV packs the greatest punch. Voters say they want to hear how brands are responding to the pandemic and Black Lives Matter on television.

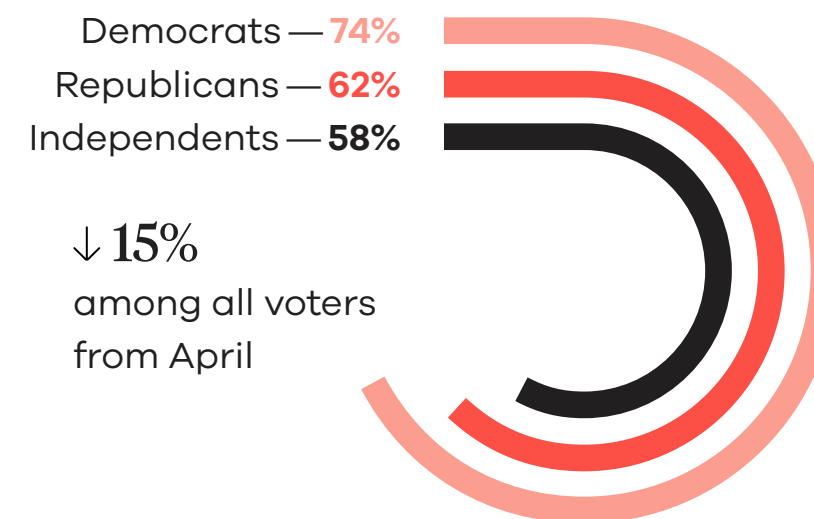
Appreciate when a brand sends tips or other information that is relevant in the current environment of social distancing



Would be more likely to support a brand that communicated around COVID-19 than one that did not



Feel valued as a customer when hearing from a brand regarding COVID-19



 65%




want to see ads featuring company CEOs explaining how they are keeping customers safe during COVID-19.

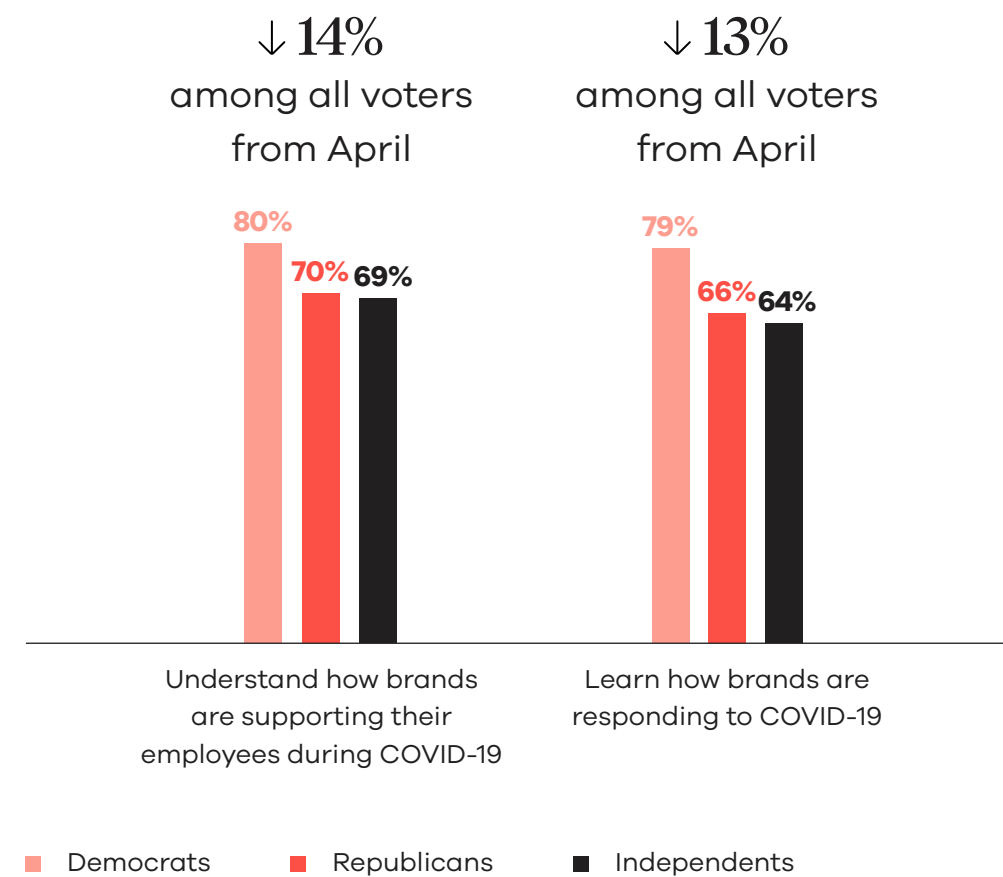
 60% say most statements from brands/companies in support of BLM felt inauthentic.

BRAND COMMUNICATIONS

Relevance in an Age of Uncertainty

Top three ways voters want to hear from brands around COVID-19 and BLM

1.  TV ads
2.  Email
3.  Social media



Conclusion

During these uncertain times, voters turn to political advertisements and brand communications to keep them informed. Consumers want to hear how politicians and brands are tackling the issues that are relevant today, particularly the impact of COVID-19 and the future of the economy.

In order to reach voters (particularly undecided voters) in a way that is relevant, advertisers must deliver clear value while ensuring trust and transparency. Brands and politicians today need to elect to do the following.



Deliver new information

The two Presidential nominees are well-established at this point, but over two thirds of voters are still eager to learn about different political views. There is still time to educate voters on state and local elections about which they are not as informed.

Remain unbiased

With today's polarized politics, voters expect and appreciate ads that don't lean too far to one side of an issue. This lack of bias engenders greater trust. An advertiser should lean on numbers and facts — voters want to see the stats that prove a candidate's track record.

Stay positive

Voters are overwhelmed by the news they hear day-to-day. Positive ads that deliver a hopeful view of the future are a welcome respite.

Finally, it's about reaching the right voter at the right time

The majority of voters report often seeing ads for candidates they can't even vote for and the leading challenges to effective political advertising are frequency and intrusiveness. By correcting these missteps and delivering a message that is educational, unbiased and hopeful, a political advertiser has the opportunity to connect meaningfully with voters before Election Day.

 **7 in 10**

voters like when a political ad teaches them something new.

 **1 in 3**

voters trust a political ad that includes data and statistics.

 **30%**

say an ad is relevant to them when it evokes a positive tone.

 **54%**

often see ads for candidates outside of their voting districts.

