



Digital Campaigning in the New Decade

As you plot your digital strategy for 2020 and beyond, here's a look at what's changed, what's remained the same, and what Americans care about.

The rapid expansion of online campaigning over the last decade has come with added scrutiny and even scandal. The tools of the trade have been misused by bad actors and the public has begun to question their relationship with technology. As we begin a new decade, GSG Digital examines how Americans feel about digital media and what they think of the issues facing the industry.

Despite many changes in how we use them, the big platforms remain dominant.

Americans spend a significant amount of time online.



describe themselves as
online at least once a day

Over a third of people (35%) said they are online almost constantly, and that number jumps even higher when we look at people between the ages of 18-40 (49%).

What are they doing?

When it comes to social media, Facebook is still the most dominant social network with reach across various demographics. **75% of people surveyed said they check Facebook, including 77% of 18-40 year olds and 75% of people ages 65+.** Despite Facebook being known as a place to reach an older audience, our research shows it is still a popular social network among younger Americans, with 70% of those 18-26 on the platform, 83% of those 27-34 years old, and 80% of those 35-40 years old.

Other popular online activities include **watching videos on YouTube (63%), researching topics of interest (63%) and reading the news (61%).** Only 27% surveyed said they check Twitter.

TAKEAWAY:

Are we keeping an eye on new platforms like TikTok? For sure, but the vast majority of time spent online is still dominated by Google/YouTube and Facebook. If you're looking to reach a large portion of people at scale then your campaign should focus on Facebook, YouTube, and news websites.

Democrats, Republicans, and independents live different lives online.

Democrats are more frequently online. Republicans are more frequently on Facebook:

■ Democrats ■ Republicans

Describe themselves as online “almost constantly”



Check Facebook



Check Twitter



Check Instagram



Where are the independents?

Affiliated Americans are more likely to have researched candidates online (36% Democrats, 34% Republicans, 29% independents), or share news articles on social media (30% Democrats, 34% Republicans, 23% independents). **Independents are the least likely to engage with any political action online** (36% of Democrats took no action, 33% of Republicans, 45% of independents). That's not to say independents aren't engaged though, **they are the most likely to have emailed an elected official** (9% Democrats, 12% Republicans, 15% independents).

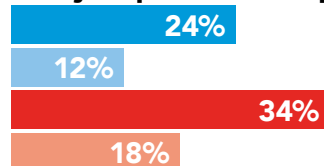
The most partisan voices are the loudest.

If it feels like your online feeds are hyperpartisan — you're probably right.

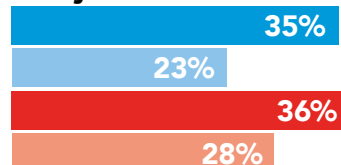
Democrats that self ID as "Liberal" are twice as likely to post about a political issue on social media and by 12 points are more likely to share a news article on social media. On the other side of the spectrum, Republicans that self ID as "Very Conservative" are far more likely than their non-conservative counterparts to share news on social media or post about a political issue.

■ Liberal Democrats ■ Very Conservative Republicans
■ Non-Liberal Democrats ■ Non-Conservative Republicans

Likely to post about a political issue on social media



Likely to share a news article on social media



TAKEAWAY:

If your campaign goal is to drive actions like letters to an elected official or posts about an issue, it can be beneficial to tailor your messaging to the extremes. However, don't assume that vocal social media posters are representative of the general public. People with moderate opinions are online, even if their voices are not as loud.

Americans are concerned about data privacy, but they don't prioritize it above all else.

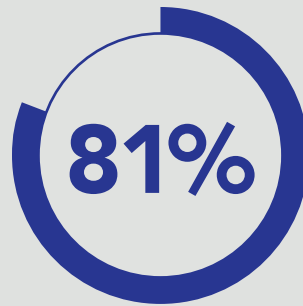
Americans' greatest worry for the future of digital is data privacy.



say they are concerned, more than any other issue tested.

This was particularly true among women, 76% of whom said it was a concern.

However, while people are concerned about how their data is used, **they are willing to compromise in exchange for free and improved services.**



say they prefer free content supported by digital advertising over services that require a subscription.

43% of people say they prefer online content and services that are more relevant to their interests over a greater level of data privacy.

Many Americans hold complex and even contradictory views around data privacy. 61% of those that say they prioritize relevant content and services over tech collecting less data, still identify data privacy as a top concern.

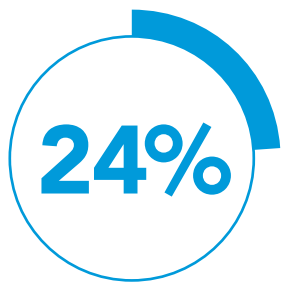
TAKEAWAY:

People have a more nuanced understanding of the trade-offs online than is often assumed. Be clear in how you are using data to reach, target, and benefit your users, and they may be more forgiving than you expect.

People still don't understand how ads are targeted online.

Though they are concerned about how their data is being used, there is little understanding among Americans of the extent of digital media's targeting capabilities.

Even the most common targeting practices are not widely known among the general public.



of people **do not believe** that ads are targeted by tracking visits to websites and apps, one of the most common practices for targeting ads, while only 47% of people believe that ads are targeted by tracking the location of people's cell phones.

ABOUT GSG DIGITAL

The way people consume information has changed and our options for communicating have never been greater.

A good communications strategy involves examining your audience, understanding what moves them, and delivering them engaging, targeted, relevant content—online and off. Whether pushing a policy with digital advocacy, growing a brand through digital advertising, or responding to breaking news with social media, our approach is consistent: we help reach the right audience, with the right message, at the right time.

For more insights, sign up for our weekly Impressions email:

<http://www.globalstrategygroup.com/impressions>

Global Strategy Group conducted an online survey of 1,000 registered voters nationwide between November 19th and November 22nd, 2019. All interviews were conducted via web-based panel. Care has been taken to ensure the geographic and demographic divisions of the population of registered voters are properly represented.