



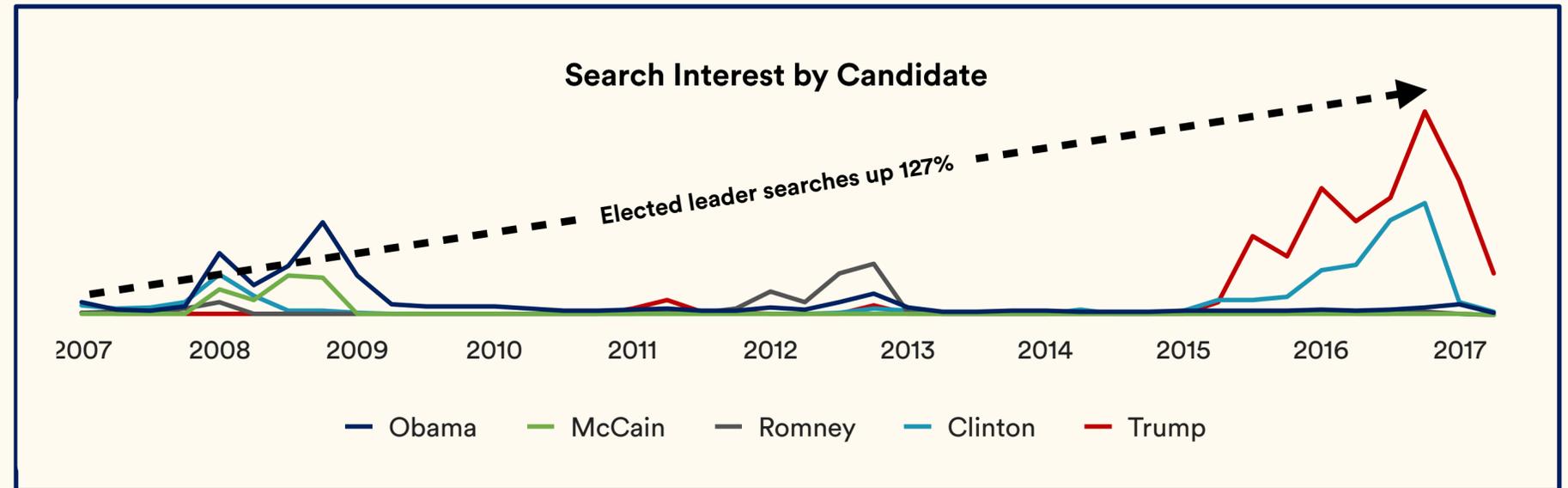
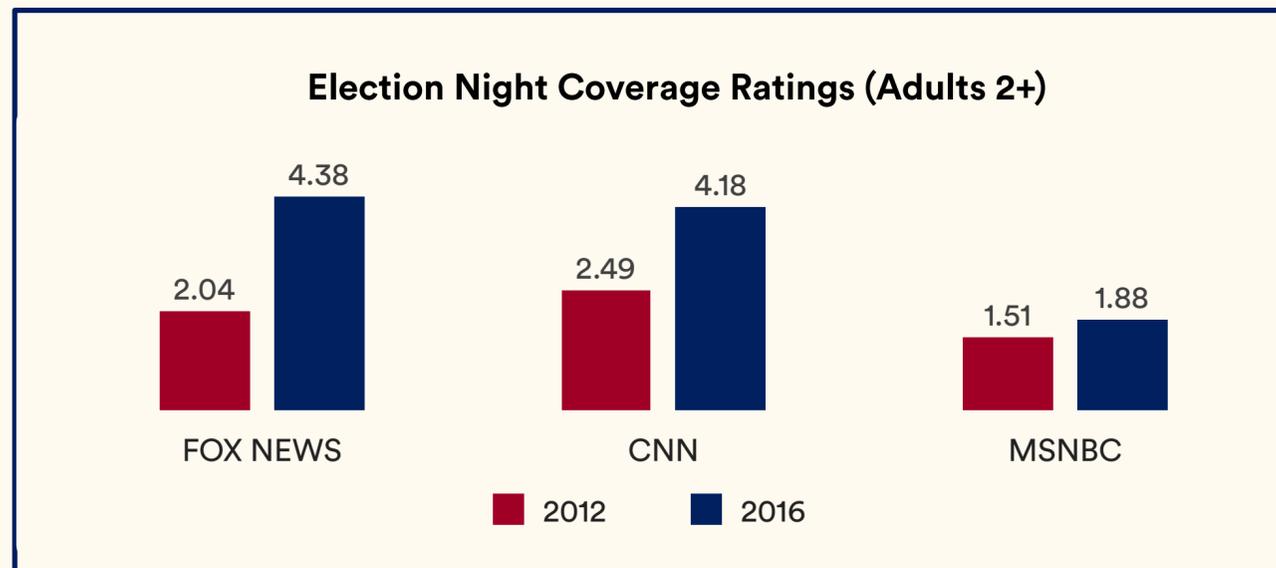
2020 VISION

POLITICAL PREPAREDNESS IN A CUTTHROAT CLIMATE

IT'S NOT A QUESTION OF "IF," IT'S A QUESTION OF "HOW BAD?"

You don't need to work in marketing to recognize the political hurricane raging through our country's media and culture. Most of America is highly aware of the billions of dollars pouring into their broadcast waves, cooked devices and, social feeds at exponentially growing rates. Media itself has been more than just a bystander—contributing to the revolving door of new platforms, technology, and fragmentation of the landscape itself. Before the dawn of TV, political candidates literally had to shake the hands of their constituents and participate in the pomp and circumstance of town halls and occasional debates. Since, it's become the wild wild west, where seemingly anything goes: the TV ads are on the attack, outdoor ads have turned guerrilla, and tweets and data mining have become the status quo for subliminally winning hearts and, inevitably, votes.

Given the growing news ratings amid a soft linear market and heightened interest in political names, it's clear that **our society is taking a more personal investment in American politics** and the marketing that accompanies it. The motivation to vote no longer rests solely on civic duty, but rather a moral code and a symbol that proclaims, "I care." The stakes and emotions are high, putting a new tension at play for consumers and marketers alike: **how to strike the perfect balance of information and escapism.**



We as marketers have traditionally erred on the side of caution when approaching politically ridden environments, citing concerns of brand safety and the comfort of a wide open media ocean void of political topics to go fishing in. The fact of the matter is, the share of media stripped of politics is shrinking with each election cycle, and consumers themselves are game for the conversation. News and Factual (documentaries, magazines, talk shows, etc.) TV formats are among the largest growing investment areas for spot TV buys (rank #2 and #3 behind Sports). Furthermore, the average time spent with political news sites has grown at a higher rate this past year than any entertainment genre website.

★★★★ **IT'S TIME TO SHED THE ASSUMPTION THAT POLITICS AND BRANDING CAN'T MIX.** ★★★★★

In our latest Scout custom study, we sought to uncover the **new rules** for navigating a tense political climate that is literally shaping media before our eyes. We wanted to find out what consumers *really* believe, question, and flat out avoid; which media channels are suffering the most; and how brands can take advantage or adjust brand safety protocols as they head into 2020.

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≡ ALL EYES ARE ON 2020. AND FOR GOOD REASON. ≡

2020

2016 and 2018 set a new tone for politics and spurred major expectations for the coming election.

But before looking ahead at what's to come, let's first look back at where we've been.

OUR CLIMATE TODAY WAS SEEDED BY AN UNPRECEDENTED MIDTERM

BIG MONEY

The 2018 midterm election was the most expensive midterm in history with over **\$5 billion in spending**. At certain placement levels, we even saw stations refuse to take additional political orders, pointing to the **over-saturation across several markets**.

For 2020, we expect a similar disruption across markets, especially with the entrance of Michael Bloomberg into the race.

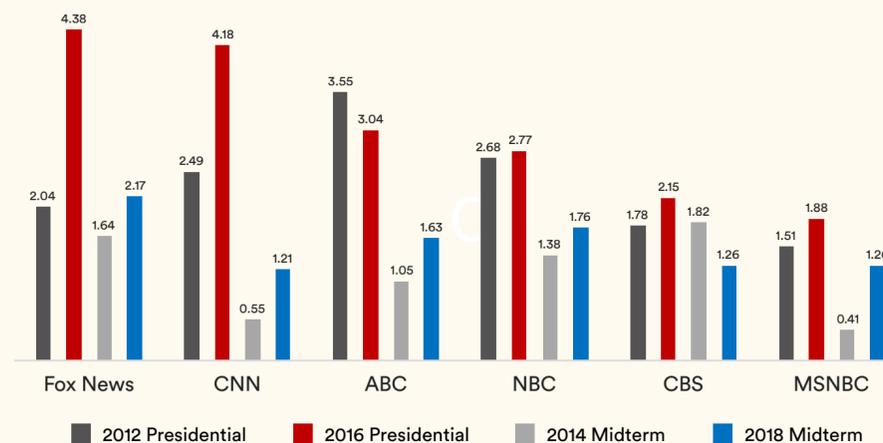
MOST EXPENSIVE MIDTERM EVER: COST OF 2018 ELECTION SURPASSES \$5.7 BILLION

Bloomberg places at least \$37 million in television advertising over next two weeks

BOOMING RATINGS

Political news media has hit a golden era, particularly on cable news, which benefitted from incredible ratings boosts during the 2016 election and again during the 2018 midterms.

A2+ Election Night Coverage Ratings



SHIFTING MEDIA

Recent elections initiated a new media dynamic as Americans—including journalists—grew more comfortable seeking their news in social channels. Today, more than ever, **social media influences our traditional media cycles** and consumers are taking a **less passive** approach to being informed by allowing the news to come to them in-feed.

2018 has taught us our democracy is strong

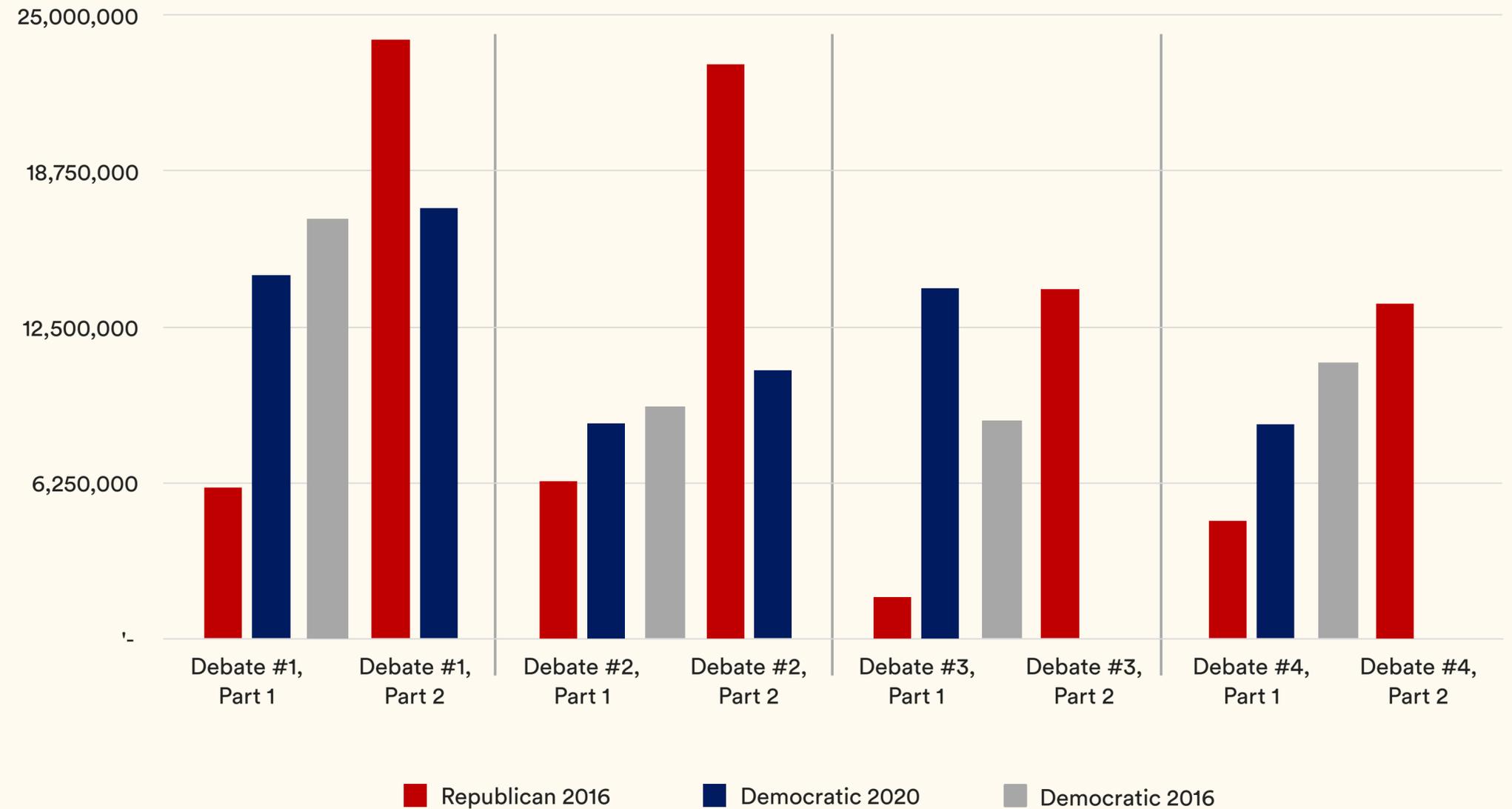
4 Things We've Learned About Social Media From This Election Cycle
 We will remember this election cycle for a long time. We'll also remember it for what it's taught us about social media.

THE DEBATES ARE OFF TO AN INCONSISTENT START

While the first Democratic debates opened with significant viewership (night two drew the largest TV audience yet for a Democratic primary matchup, with **18.1 million viewers** vs. 15.5 million for the October 2015 DNC primary debate), they've failed to deliver similar numbers since and pale in comparison to the #TrumpEffect on the Republican primary debates, which drew in over 23 million viewers during the first debate on Fox News.

Social interactions have followed a similar pattern: peaking at 16+ million mentions across Twitter, Facebook and Instagram and dropping below 6 million during the on November 20, 2019 debate.

2016 vs. 2020 Primary Debates 2+ Viewers



Sources: Nielsen TV and Nielsen Social Content Ratings

Note: 2016 Republican primary debates included two telecasts that aired on the same day, at different times while the 2020 Democratic primary debates aired on different dates for the first two

EVOLVING VOTER TURNOUT WILL CONTINUE TO OVERWHELM CAMPAIGN STRATEGIES

Just as the political media landscape shifted the past two+ years, so have the voters themselves. According to U.S. Census Bureau data, voter turnout between 2014 and 2018 grew over 10 points (41.9 to 53.4).

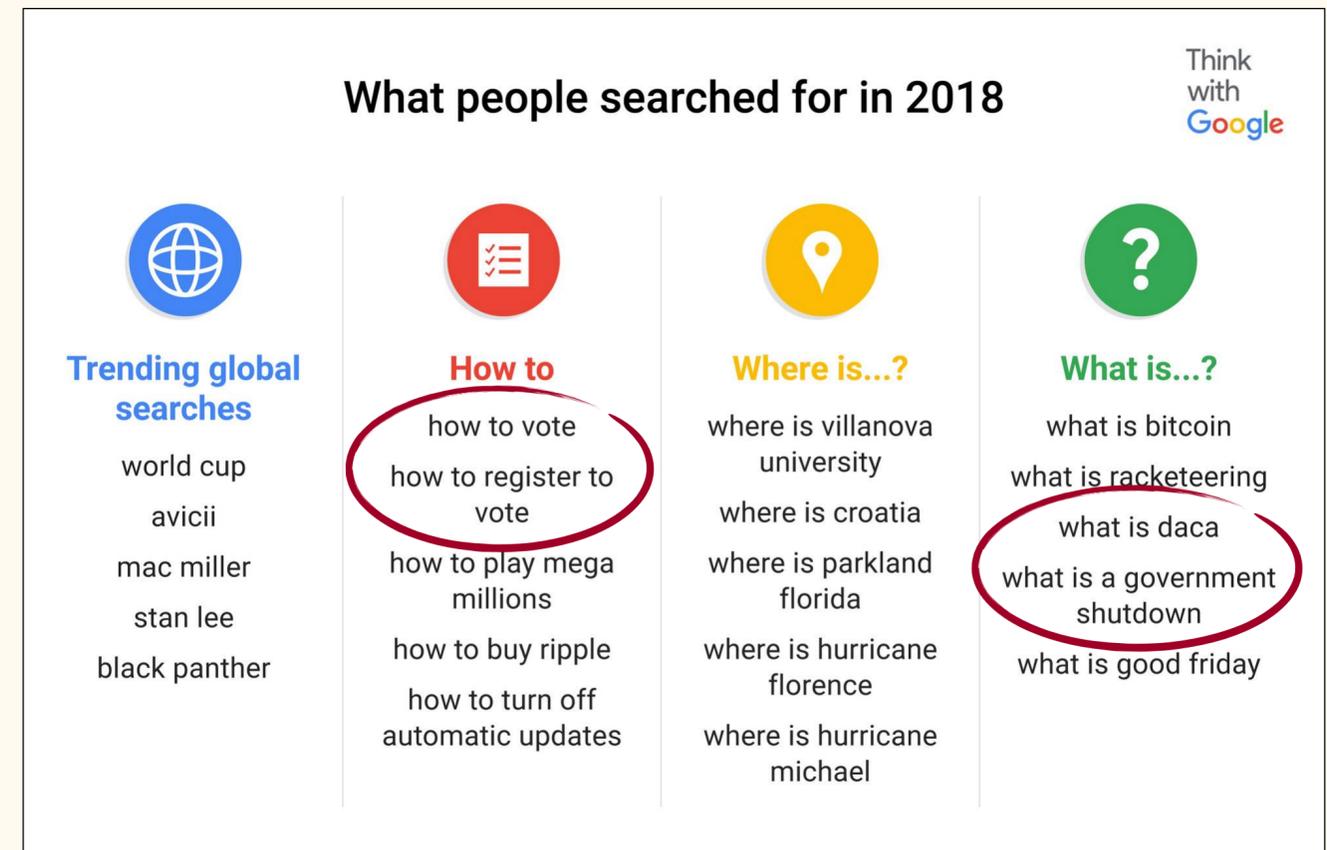
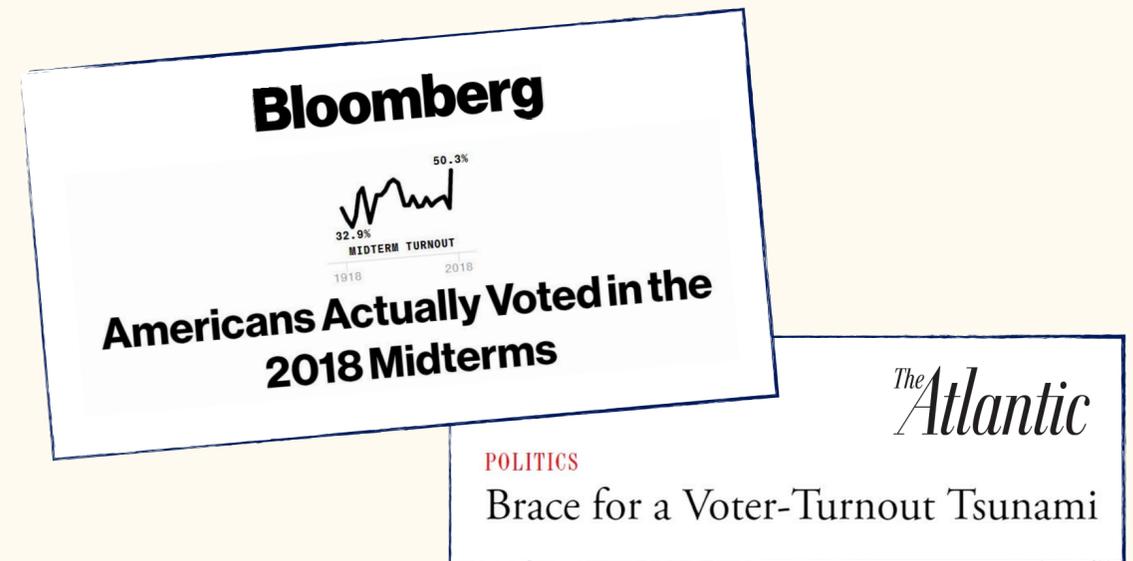
To no surprise, this historic increase was driven by:

18-29 YEAR-OLDS
(Gen Z and youngest Millennials)

HISPANIC

NON-HISPANIC BLACK

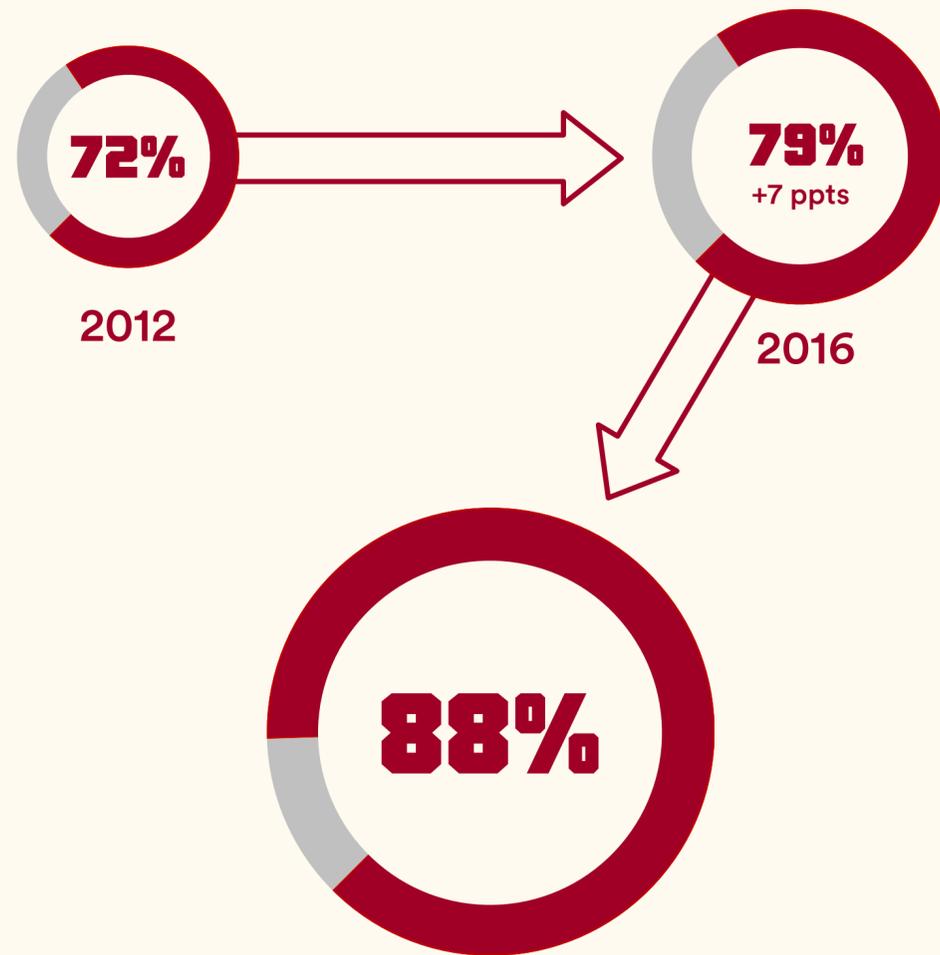
As many of these voters were first-time voters, digital media like search played a significant role in educating how to vote and staying informed on major social issues.



PARTICIPATION IS EXPECTED TO KEEP GROWING

★ PRESIDENTIAL ★ ELECTIONS

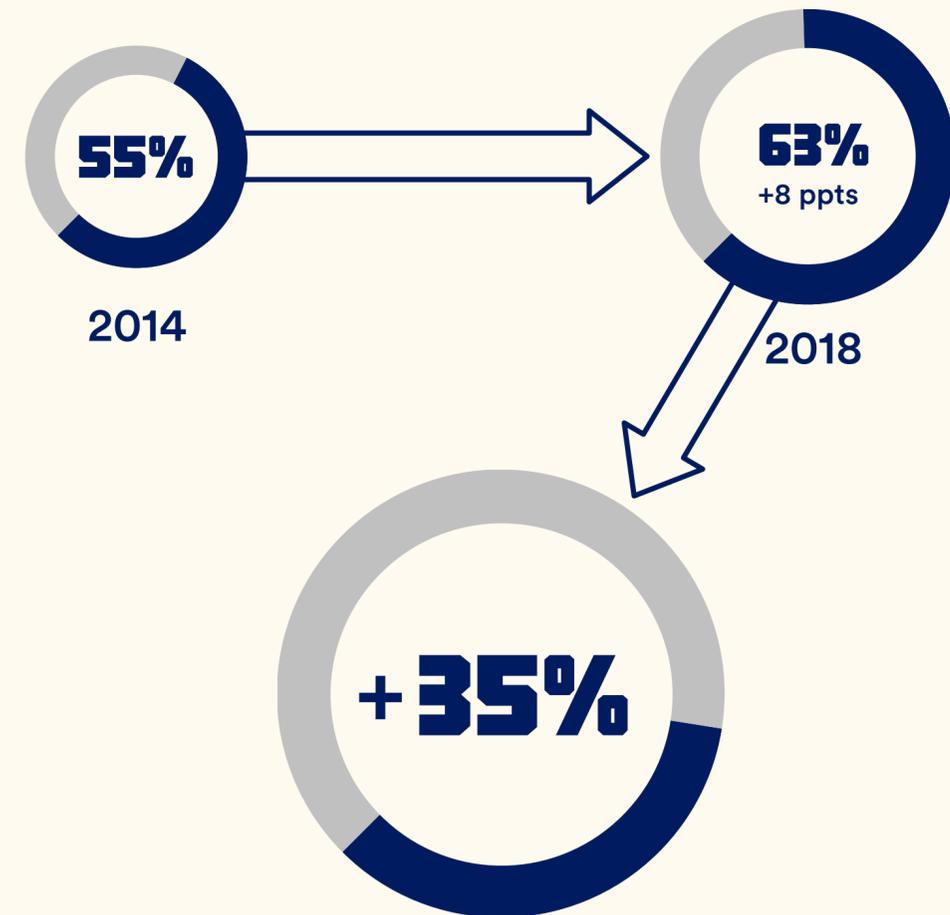
ELIGIBLE VOTER PARTICIPATION



already know they will vote in 2020

★ MIDTERM ★ ELECTIONS

ELIGIBLE VOTER PARTICIPATION



don't typically vote during local/state elections
now take interest in those races

With this burgeoning political climate and multitude of media and consumer impacts,
HOW DO BRANDS STEP INTO 2020 WITH POLITICAL PREPAREDNESS AND CONFIDENCE?

SAMPLE SPECS

Fielded May 2019

Representative of contiguous U.S.

Eligible voters (17+) who have voted in recent elections or plan to vote in 2020

2,000+ respondents

- 100+ respondents in early primary states
- 650+ respondents in swing states

51 % female/49% male

SAMPLE QUESTIONS

What is your preferred channel for getting your news?

How has your political news behavior changed since the 2016 election?

How many political news sources do you trust completely? Which ones?

What are your feelings toward TV during election time?

If you wanted to avoid political content, where would you go to take a break?



WHAT WE FOUND

- 1** 2016 GAVE RISE TO THREE UNIQUE TRIBES WHO NEED TO BE APPROACHED DIFFERENTLY
- 2** YOUNGER GENS ARE THE MOST JADED AND NEED THE MOST SUPPORT
- 3** INFORMATION IS A DOUBLE-EDGED SWORD THAT DEMANDS BOTH TIRELESS SCRUTINY AND THE ABILITY TO TURN OFF
- 4** DEBATE TIME IS THE MOST CRITICAL FOR POLITICIANS, BUT MAY BE QUICKSAND FOR BRANDS
- 5** SOCIAL AND DIGITAL WILL BE HIT THE HARDEST, POTENTIALLY CREATING AN ANALOG REVIVAL
- 6** VOTERS ARE SAVVY ENOUGH TO SEPARATE BRANDS FROM POLITICS

It's easy to assume that 2016 sent all Americans deeper into their corners of the metaphorical partisan boxing ring to defend their position against the other side of the aisle. All you read about lately is the political polarization of the country, worsened by a growing divide we'll never recover from.

Much in line with the spirit of the past four years: Don't believe everything you read.

Brands can't go into 2020 with their gloves up, ready to dance around (or take a punch from) angry, highly sensitive activists. Sure, there *are* highly passionate, provoked voters out there; just as there are people with their blinders on, or those just trying to carry on. For many, 2016 forced them to press pause on their political engagement and ride the wave until stable ground (like information, credible sources, and allies) becomes available again.

The differing attitudes among these segments of voters lend themselves to unique needs and marketing approaches. Brands must understand their localized composition of these segments and ask: *“Are my customers more likely to feel burned and skeptical, or are they annoyed and in hiding?”* The answer may inform a more delicately tailored approach to create resonance and empathy—rather than friction and preaching—in 2020.



2016 DID NOT FORCE EVERYONE INTO A HIGHLY PASSIONATE, HYPERENGAGED MENTALITY.

INSTEAD, 2016 GAVE RISE TO THREE UNIQUE TRIBES, VARYING BASED ON A SPECTRUM OF POLITICAL PASSION:

★ THE AVIDS

★ THE INDIFFERENT

★ THE BURNED



MEET THE TRIBES

14%

★ THE BURNED

BECAME LESS PASSIONATE AFTER 2016

Millennials and Gen Z | Multicultural
(Black, Hispanic)

Lower voter turnout due in part to ineligibility

Since 2016:

50% became less interested in local races

45% started tuning out political news

“I’ve lost my faith in the whole process.”



46%

★ THE AVIDS

BECAME MORE PASSIONATE AFTER 2016

Boomer and Silent Gen | Mostly White

Already high voter turnout across
presidential and midterm elections

Since 2016:

77% became more interested in local races

83% have paid more attention to political news

**“To say I’m involved would be
an understatement.”**

40%

★ THE INDIFFERENT

DIDN'T FEEL IMPACTED BY 2016

Gen X and Millennials | White with minor Asian and Black skew

Average voter turnout (stick to presidential elections)

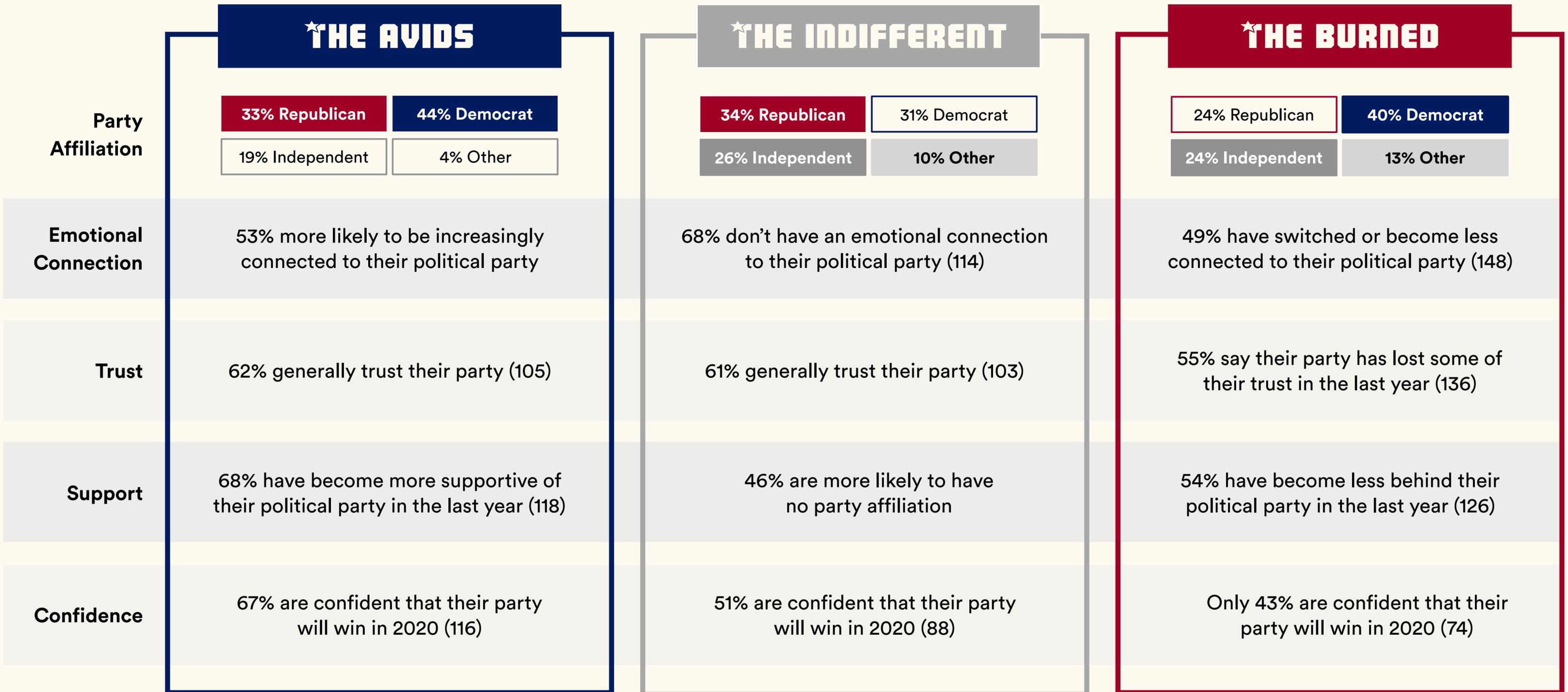
Since 2016:

76% have remained indifferent toward local/state races

Their relationship with political news hasn't changed

“It’s just not my cup of tea.”

EMBEDDED IN POLITICAL PASSIONS ARE DISTINCT RELATIONSHIPS WITH PARTIES



ANTICIPATING THE BATTLEFIELDS AND WHITE SPACE

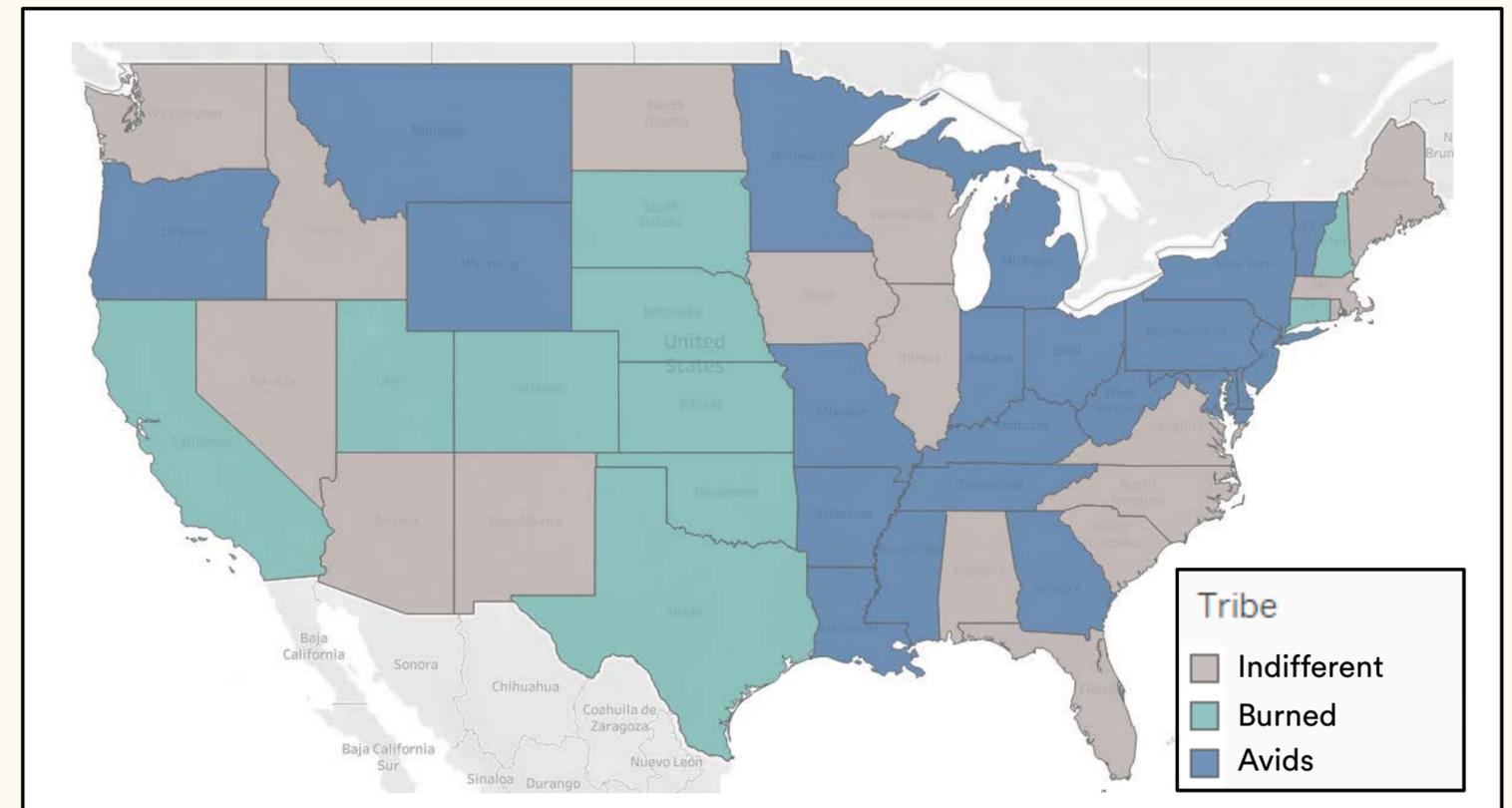
It's easy to overlook a group called "The Indifferent." In marketing, indifference is one of the biggest threats to a brand's bottom line and growth potential. For politicians, though, it represents a fertile opportunity that could be the difference between victory and defeat. [New York Times](#) analysts theorize that while it's easy to get caught up in the headlines of historic voter turnout, the secret sauce may in fact be in those voters who are sitting in the peripherals of American politics. Take a look at the map to the right. The Indifferent are more prominent in extremely critical states, including many swing states like Wisconsin, North Carolina, and Arizona. What does this mean to the everyday brand? **Indifferent populations are going to be very hard to reach in 2020.** As they don't plan to change *anything* that they do this election year, they're likely to be the most saturated political target, surrounded by walls of clutter and white noise. The best approach? Let them come to you. Capitalize on programmatic media and data to identify hand-raisers and look-alikes to effectively and efficiently communicate with the Indifferents who overlap with your best prospects.

Conversely, the other two tribes stand out not only for their polarized perspective on politics, party, and media in 2020, but for their **white space opportunity to marketers.** While The Avids are more firmly planted in "political junkie" territory, The Burned have become numb to the breaking headlines and clutter in their feeds, which has led to a decline in interest and general loss in faith of the government. Both represent less-than-desirable traits to politicians.

The New York Times

Democrats have an opportunity to gain by tapping into another group: **the voters on the sidelines of American politics**, who haven't voted in recent elections or aren't registered to vote at all.

'Difference-maker' independent voters in U.S. presidential election crosshairs 



Heading into 2020, brands must consider: Who is my target demo and what does my brand offer? If answers are things like "older consumers," "sophistication," and "research-backed quality," you should find yourself in equal parts traditional TV and digital. If your success relies on younger, multicultural, or jaded audiences, your emphasis should be in non-traditional media like streaming video and niche social platforms.

Entering the world around 9/11 and coming of age amid the 2016 election, Gen Z is bookended by two major moments in U.S. history, and consequently has never known a world without political, social, and international turmoil. They're a generation defined by memes, movements, group chats, and GIFs. Between staging walkouts, protests, and being a part of the driving forces behind "cancel culture," Gen Z has shown they not only have opinions and values, but are willing to put both convenience and their reputations on the line for what they believe in. Ahead of them, Millennials are often referred to as the "triggered" generation—an opinionated and socially vocal cohort who enforced a new wave of social "woke-ness" by starting conversations around gender, racial, and class inequalities.

The political engagement résumés of these two generations seem fairly black and white. Of course voters with this incomparable value and voice are at the forefront of political shifts. Right?

The media is especially guilty of exploiting young voters on their extreme behaviors and decisiveness. **The truth is: Gen Z and many Millennials are extremely jaded and actually more undecided than the rest of the voter population.** They are the most likely cohort to agree that their political party has lost some of their trust and have decidedly removed themselves from political contexts for self-preservation. Even though it was three years ago, the memories and strong emotions from the 2016 election are fresh in young voters' minds. The sense of pride, optimism, and notion of change they felt going into the summer 2016 was quickly discouraged as their turnout fell short and shifted their perspective to bitterness.

As a society, we may not have Millennial and Gen Z voters figured out; nor have we given them time to mature and fully realize their strength and voice. By November, there will be approximately 16.7 million new potential 18–22 year-old voters. Brands need to deliver them empathy for their uncertain formative years, a haven for reliable information, and a platform to continually refine their voice and perspective—not an expectation to have it all figured out.

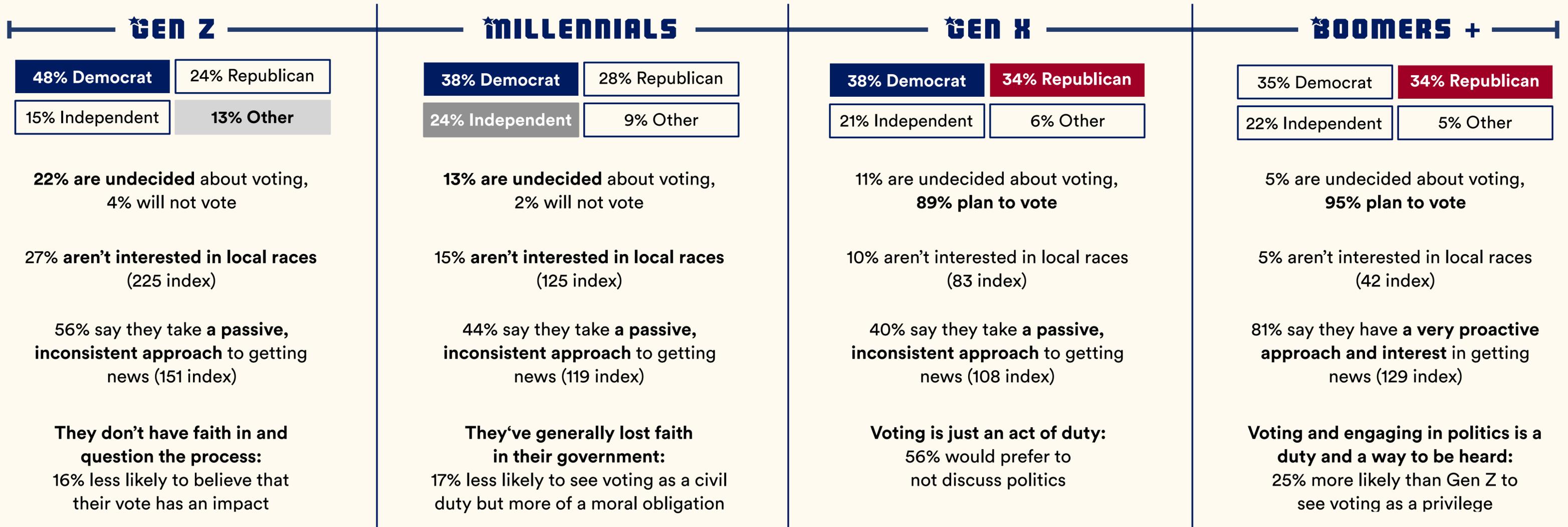


YOUNGER GENERATIONS ARE THE MOST JADED WITH POLITICS

POLITICAL DECISIVENESS AND INTEREST TRENDS WITH AGE

While older gens like Boomers+ are confident and set in their decision to vote, a larger share of younger generations are still toying with the idea. In their minds, “modern-day” politics still haven’t caught up to how they think about and interpret the world and its ever-changing needs. They view government and the voting system as unevolved and an antiquated function. As it stands, they know what they believe in, but the current political structure isn’t open enough to embrace those sets of beliefs. Sure, they skew Democrat; but, they also overindex for Independent and other parties. In fact, Gen Zers are 63% more likely to say they don’t have any political affiliation due to the fact that they don’t feel complete alignment with any party.

Each generation also has a varying perspective on where their power lies. Boomers and generations older than them believe their power rests in the vote itself. Younger generations aren’t buying that so much, and are more likely to question if their vote matters or even counts. They believe their power is in their voice and actions, and are waiting for the system to catch up with this notion.



(DIS)TRUST IS AT THE CORE OF YOUNG GENERATIONS' BEHAVIORS



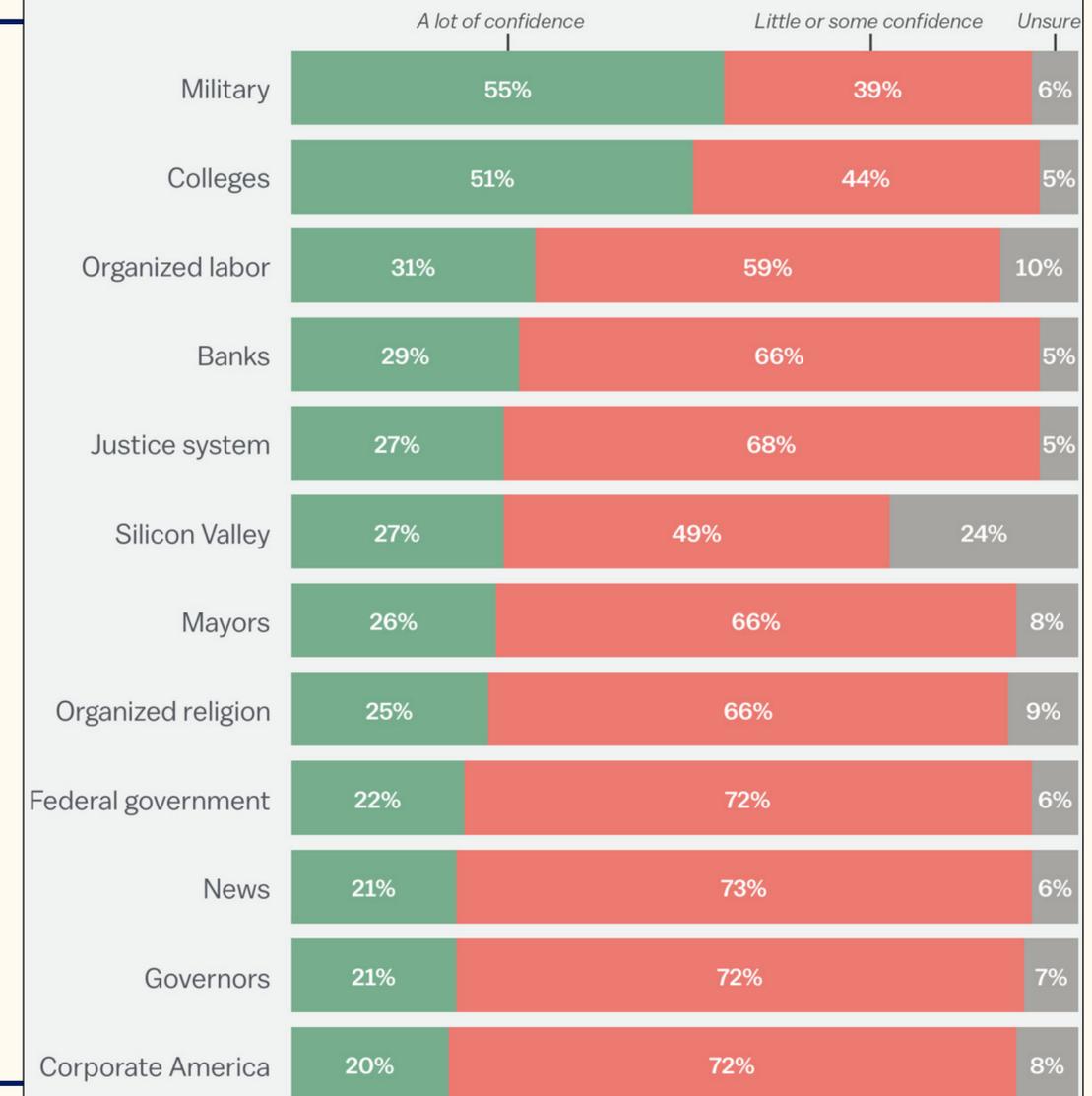
Gen Z are more than 'vocal.' They put their mind to work, expecting more from brands, peers, and society. The unsteady environment in which they came of age during has significantly shaped not only who they are but how they engage, who and what they will trust.

They are evoking change from their homes and dorm rooms, pushing brands to rethink communication messaging, channels, and behaviors.

—Ryan Riess, The Hershey Company

Millennials have little confidence in major institutions

Based on a survey of 1,200 American millennials (ages 18 to 34)



Source: Survey of 1,200 18- to 24-year-old Americans (EY and EIG, 2016)



TO COMBAT DISTRUST, THEY RESTRAIN FROM “TRADITION”

Keeping in mind that roughly a quarter (23%) of Gen Z and Millennials will be hitting the polls for the first time in 2020, there is a certain demand for information. One of their major concerns going into the election year is the utter lack of reliable information available. Not only are they pushing against the traditional bounds of politics, but they also feel they get better information from family, friends, and social channels as opposed to traditional news media. Despite their hesitation, it's surprising how malleable their opinions on politics actually are. Younger generations are attaching themselves to new ideas and perspectives if they offer a change or a fix to something that's broken.

★ OUT WITH THE ★ OLD

38%

say that while they want to stay informed, they don't want to be sucked into politics (vs. 28% of other gens)

★ IN WITH THE ★ NEW

56%

are open to discussing politics with others regardless of their political affiliations (vs. 48% of other gens)

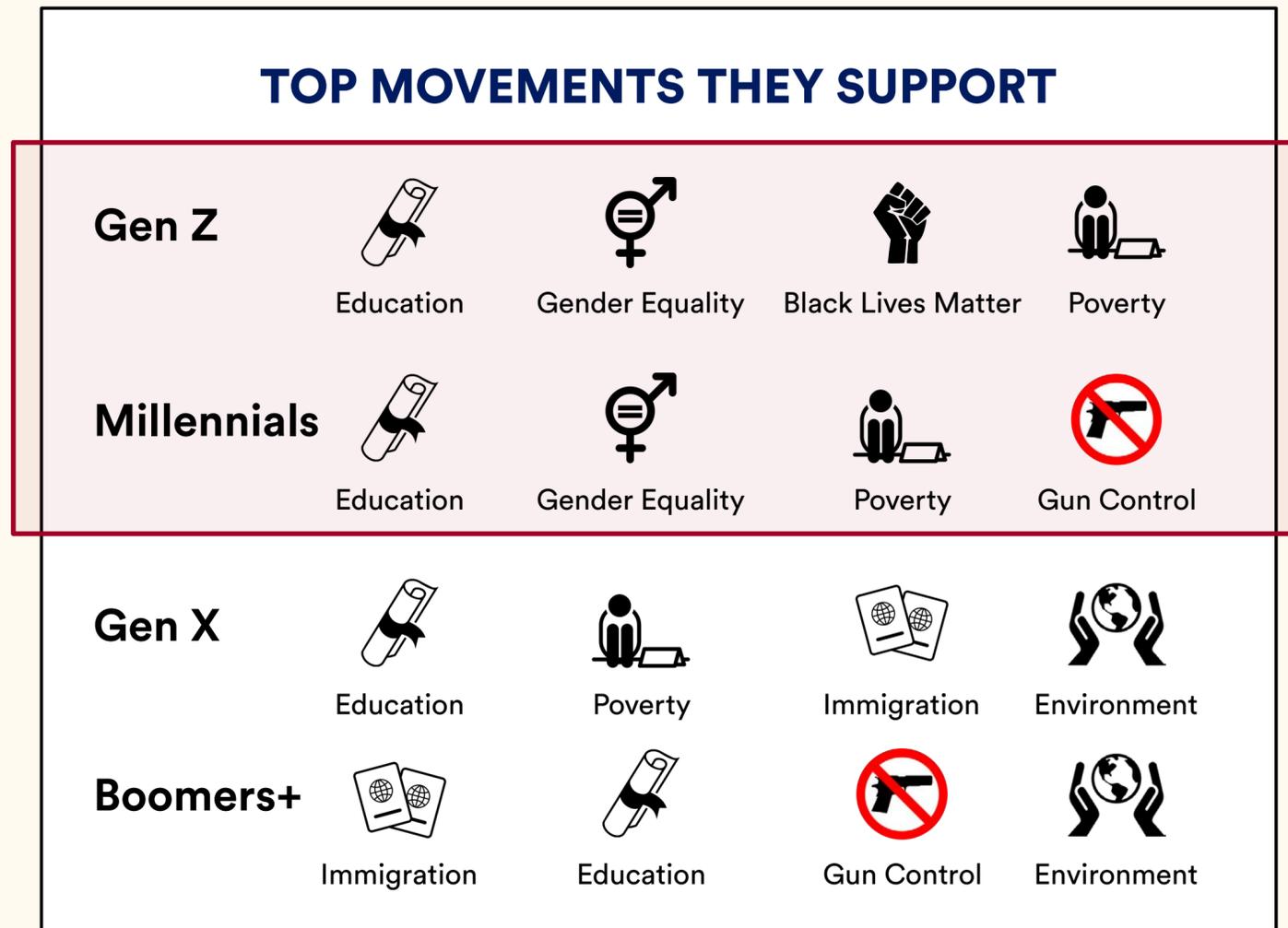
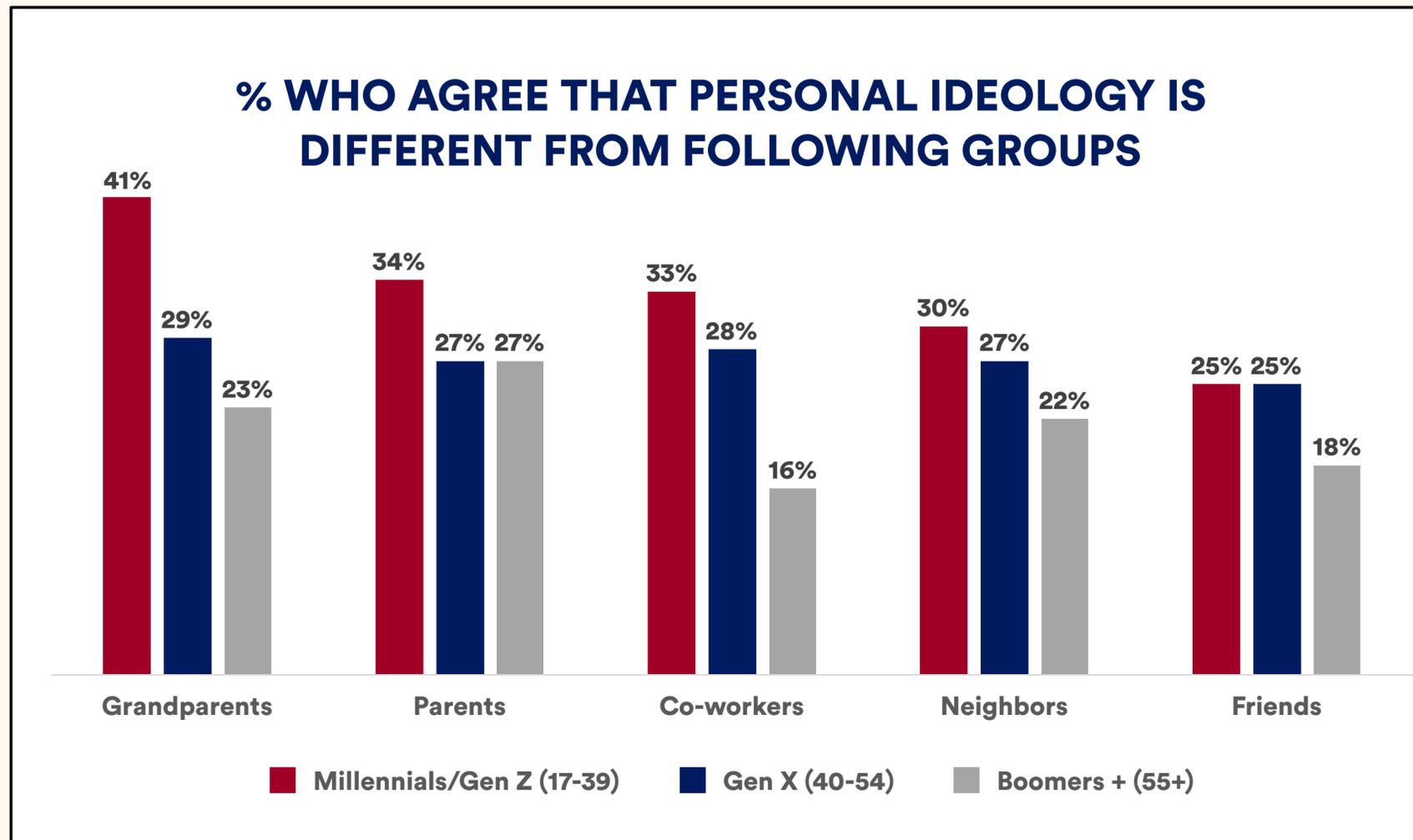
41%

have been persuaded by others to change their mind about their voting decisions (vs. 28% of other gens)

Why is “millennial socialism” on the rise? Because liberalism is failing

THEIR POLITICAL IDEOLOGIES CAN BE OSTRACIZING

Compounding the fact that they don't heavily identify with current politics, younger generations also recognize how different they are from other voters. Despite being known and celebrated for taking a stand, younger generations actually feel removed from others and their beliefs, amplifying feelings of isolation and opposition. If it feels like they constantly have their guard up, this may explain why. They are constantly defending their views and beliefs and even occasionally hiding them altogether. Twenty-six percent have lied to friends/family about who they support. They feel tired and, at times, defeated. In 2020—more than ever—younger generations need an ally to empathize with their differences and spark movements based on action, not agenda.



CRITICAL TRAITS & RULES FOR ENGAGEMENT

BRANDS NEED TO REMEMBER ABOUT AMERICA'S YOUNGEST VOTING POPULATION

They don't fully identify with the current political system and parties

They believe that power is in decibels, not votes

Skepticism is their tool for combating the status quo

They're morally conflicted between personal duty and a declining faith in the system

They feel like few are in their corners

Don't mistake their distrust for apathy. America's newer generations are hungry for fresh perspective, but are cautious with where they get it from. They are willing to experience trial and error because it's better than sitting still. Brands ready to ideate, create, and fall and recover quickly with them will produce the ultimate #friendshipgoals.



America faces an incredible trust shortage heading into 2020. The majority of Americans think that the public's trust in both the federal government *and* their fellow citizens alike has been declining. This trend is sending shock waves through the country; voters are hungry—starving, rather—for quality, unbiased information, and fear what unawareness has the potential of doing. Fifty-seven percent of Americans worry that people will cast uninformed votes in 2020, and another 51% lack confidence that others will stay informed on important issues and events.

What does this mean? **Information is the new gold in currency.** Americans are more likely to feel *more* informed and *more* sophisticated during election years. But with an upsurge of information comes an ugly consequence for voters. While they do feel cultured and refined, Americans also grow worried about their family's future, become fatigued by the negative news cycle, and become depressed about the state of society. By stepping into today's political arena, consumers indirectly sign away a state of blissful ignorance, contributing to escalating stressors and needs to escape it all.

2020 for the average American will be a critical time to strike a delicate balance of information and escapism; being diligent while having a guard up. In order to find success this year, brands must understand this complex dichotomy of engaging in politics and must appreciate the embedded emotions that consumers carry during election years and beyond. Does your brand stand for bettering families' futures? Or do you seek to rally community? Do you have a positive, feel-good story to tell? This is a time to speak up as your message will be better received during (and after) this election year.



***INFORMATION IS A
DOUBLE-EDGED SWORD
POINTING TO THE
GREATEST TENSION POINT***



2016 TRAINED VOTERS TO SEE THE WORST IN ELECTION YEARS AND THE CAMPAIGNS THEMSELVES

ELECTION
YEARS

POLITICAL
ADS

ARE

Nerve-racking
Combative
Dramatized
Annoying

Misleading
Untrustworthy
Annoying
Disruptive

ARE NOT

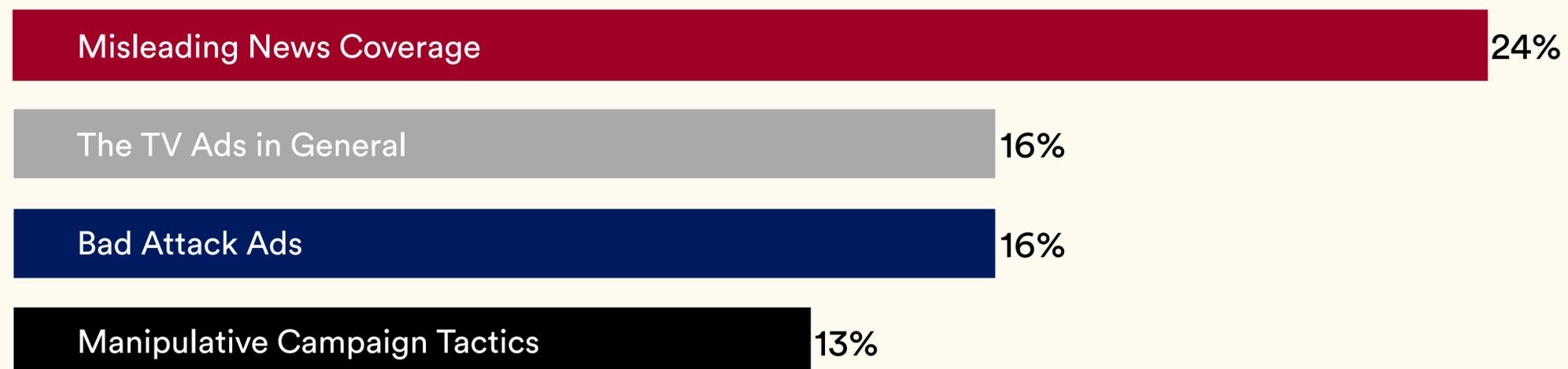
Fun
Professional

Empowering
Fair



MEDIA IS ARGUABLY UNDER TOUGHER SCRUTINY THAN POLITICIANS

If you could only choose one, what would you say is
THE WORST PART OF PRESIDENTIAL ELECTIONS?



AMERICANS TRUST AN AVERAGE OF 1.7 POLITICAL NEWS SOURCES
(1.5 for Republicans and 2.1 for Democrats).

Despite the fact that Americans acknowledge untrustworthiness and disruptiveness of campaign ads, they still aren't as concerned about ads as they are the news coverage during election years. **It appears that voters have low expectations for politicians and campaigns during election years while they expect more from their media.** They've come to expect the manipulation and attack ads, but are dissatisfied by the perceived manipulation and reliability of the media.

WHETHER OUT OF OBLIGATION, DISTRUST, OR SINCERE INTEREST, ACTS OF INFO SEEKING AND SELF-EDUCATION WILL GO UP IN 2020



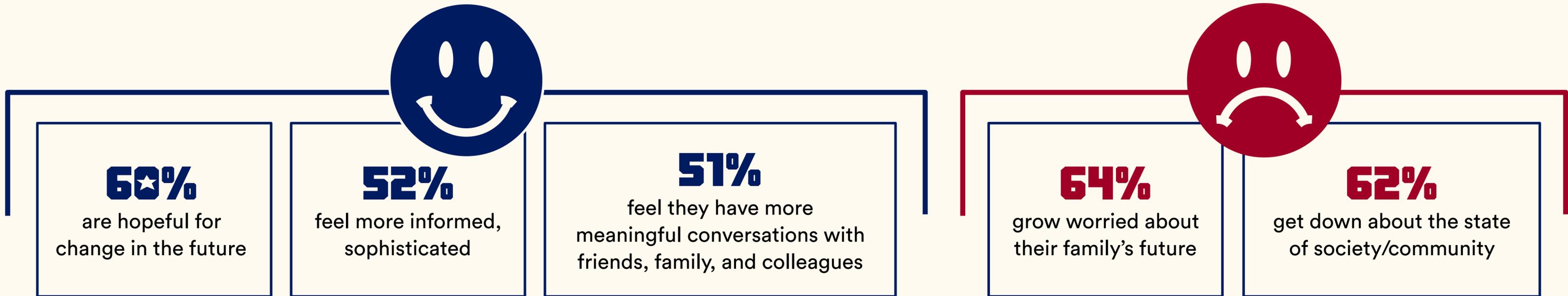
★ TOP BEHAVIORS

AMERICANS PLAN TO DO MORE OF IN 2020

- 49%** FOLLOW POLITICAL EVENTS (DEBATES, PRIMARIES)
- 48%** RESEARCH POLITICIANS FROM OWN PARTY
- 47%** FOLLOW POLITICAL NEWS
- 46%** FOLLOW NEWS IN GENERAL
- 44%** RESEARCH POLITICIANS FROM OPPOSING PARTIES
- 38%** VISIT “OPPOSING” NEWS SOURCES THAT OFFER OTHER POINTS OF VIEW



BUT MORE INFORMATION PROVOKES A DICHOTOMY OF FEELINGS



Americans' increased appetite for news heading into 2020 is bound to have a domino effect on their emotions and resulting behaviors. While most (62%) say that since 2016, they're trying to pay more attention to political news, many are also trying to draw a line to protect themselves from the anxiety and ugliness that can bubble up from greater news exposure. One-third say that they don't want to get sucked into political news to the point that it's all they consume. Likewise, many say they will seek more outlets for escapism to combat the increased "need" for news. To account for this behavior change and need, brands will need to embrace both news and entertainment formats to attain appropriate audience reach and frequency.

Respondents report that following (watching, reading, tweeting, etc.) political events such as debates and primaries is at the top of America's list for 2020. The presidential and vice presidential debates in particular are expected to see some of the largest viewership/following jumps over prior years, largely in part due to the viewing spectacle these events represent. The 2016 debates certainly set a new tone and expectation for the future. A record-breaking 17 million people tweeted about the second presidential debate, driven by an outpouring of meme-able moments that allowed participants to contribute their voices and support in response to highly shocking statements like "nasty woman" and "basket of deplorables."

In addition to the unfiltered candidate statements and the high-drama display, debates mark an important moment in the voter journey as well. Data suggests that the majority of voters have made up their mind on who to vote for by the time the general election debates conclude (if not before). What this means is that while Americans may be staying informed in politics this year, their investment in the topic for the sake of decision-making will decline following the debates. These events will be prime time for political campaigns, and a rough time for brands to make an impact.

As we anticipate higher participation and engagement during these scheduled events, this presents not only a fish-in-a-barrel opportunity for brands, but also the risk of high premiums and saturated environments. Instead, we'd advocate for a white-space prediction approach. Zig when others zag. Following the debates, voters are ready to start removing themselves from the tight grasp of politics and return to their "regularly scheduled programming." Brands will do well to take a patient approach—reserving dollars to target groups after key decision moments, especially if they offer a departure from the political realities.



***DEBATE TIME IS THE
MOST CRITICAL TIME
(TO SIDE STEP)***

HIGH ANTICIPATION EVENTS RISK OVERSATURATION

The early primaries and Super Tuesday carry the least tension in comparison to the presidential/VP debates and general Election Day coverage as the latter are expected to see some of the highest jumps in viewership/followings. Voters agree that the debates are THE most critical piece to stay informed on as the content comes directly from the source (candidates). As a result, political campaigns cannot afford to go silent during this moment in the decision journey. Their dollar and message will carry greater weight; thus, diluting the value of a brand's dollar during this time.

EVENT	WATCHED PREVIOUSLY	PLAN TO WATCH THIS YEAR
Early Primaries/Caucuses	28%	52%
Super Tuesday	24%	50%
RNC	32%	49%
DNC	34%	55%
Presidential Debate	48%	73%
VP Debate	22%	56%
Election Day coverage	51%	78%

62%

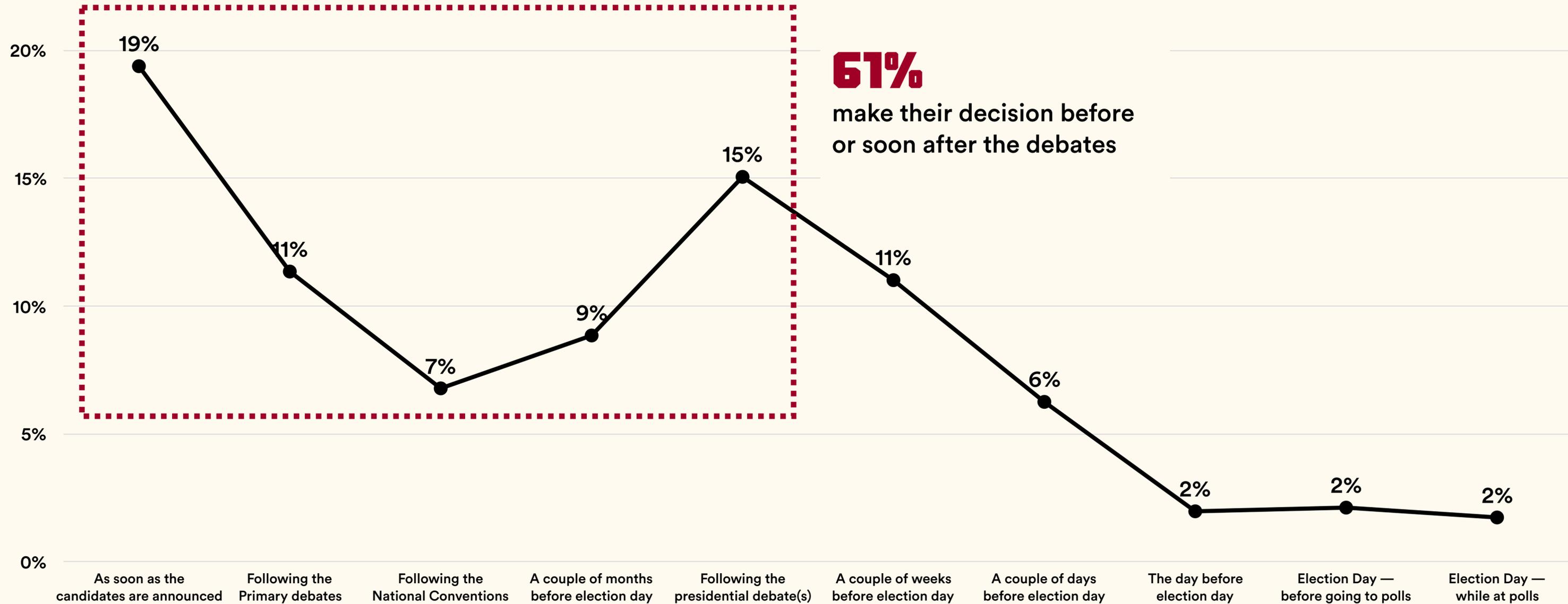
agree that early primaries and Super Tuesday carry NO INFLUENCE on their vote

#1

Americans believe that the presidential debates are the MOST IMPORTANT EVENT for the voter population to pay attention to

VOTING DECISIONS ARE HAPPENING PREDEBATE

FOR 2020, WHEN WILL YOU LIKELY MAKE YOUR DECISION ON WHO TO VOTE FOR?





BRANDS NEED TO TREAT THE DEBATES LIKE THE SUPER BOWL

BOTH ARE...

Highly anticipated consumer events



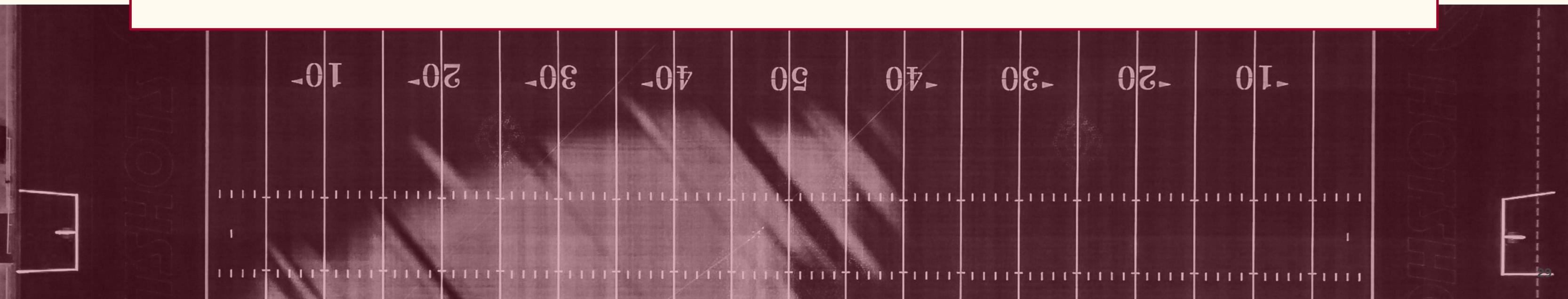
Pinnacle moments for brands to achieve high reach at an incredible premium



Contributors to water cooler conversations post-event; especially in social and digital spaces

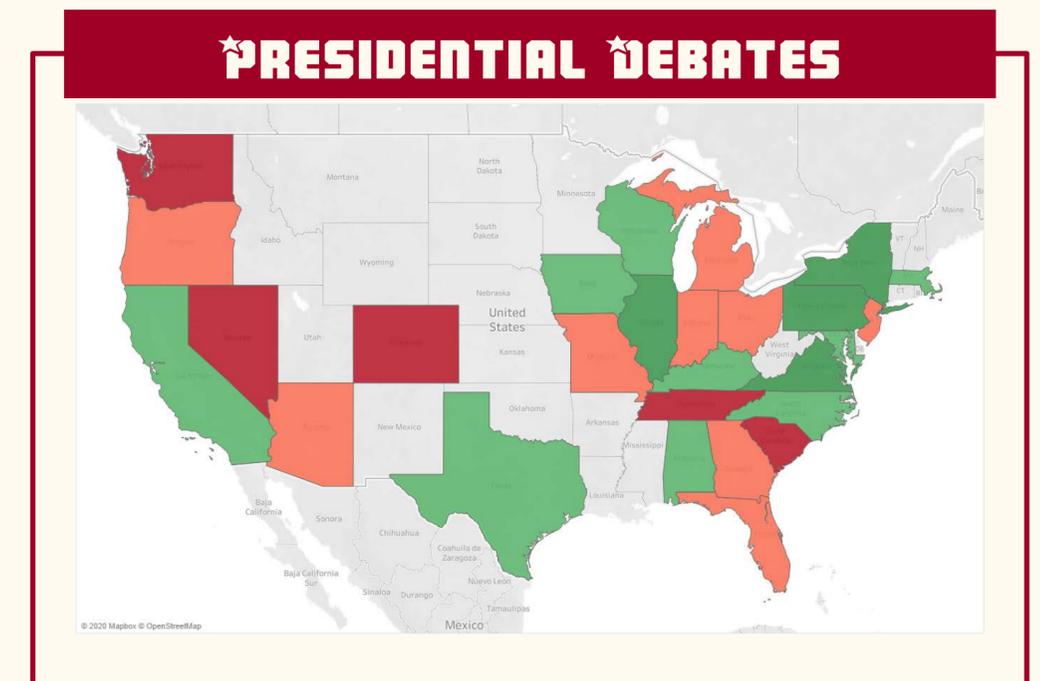
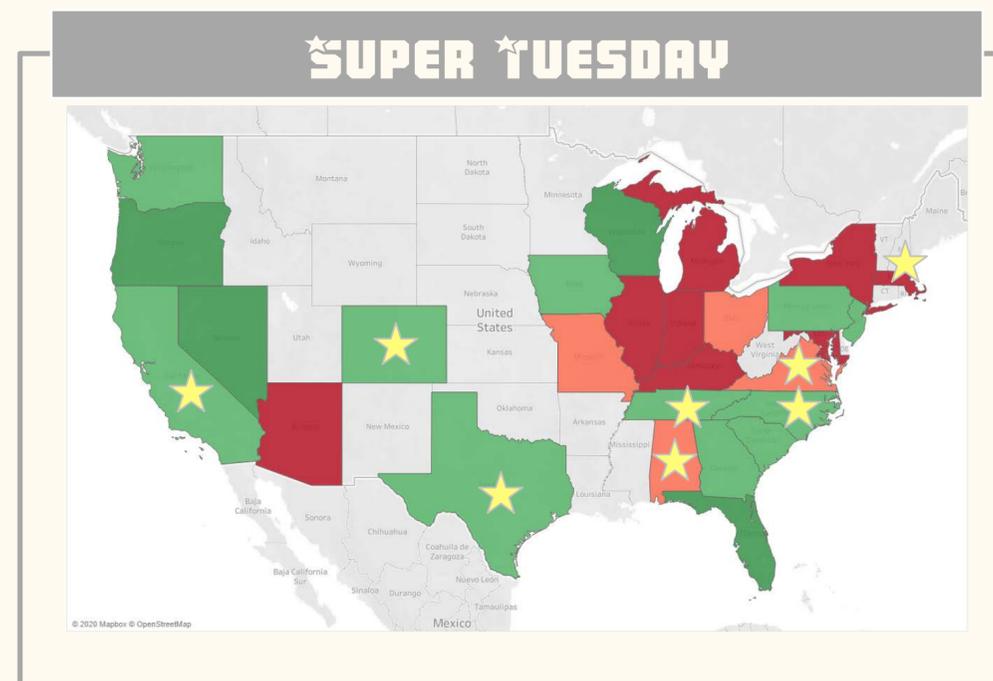
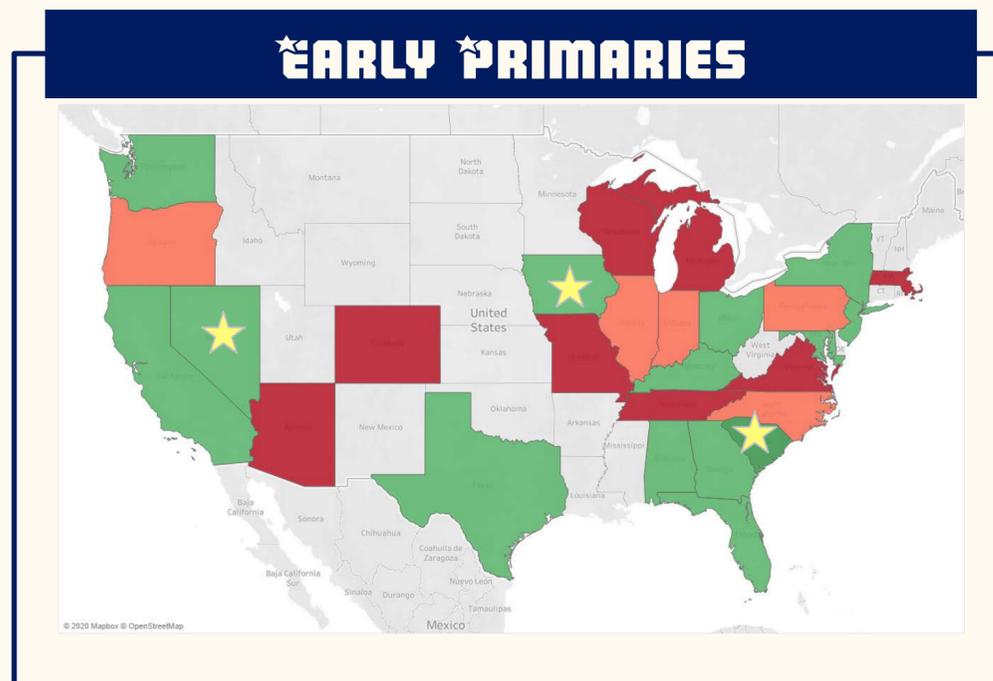


You don't have to spend here to create impact, but should be bookended to remain top-of-mind



ALWAYS KEEP LOCAL IMPLICATIONS IN MIND

Engagement in political events can vary by state and is often driven by the degree of separation (indicated by star). Populous states like California, Texas, and New York have a relatively high following of each political event, suggesting that brands should consider national buys whenever possible to avoid local premiums in these already expensive markets. Whether deploying on a local or national level, in a general or niche market, brands must be nimble to sidestep geographies that are oversaturated and rely on data signals to identify individuals ready to depart the political arena.



Most likely to follow event

Least likely to follow event

★ Primary/caucus occurs during period



Cord cutting and cord shaving are not new concepts to this election cycle nor the last. As we saw social advertising explode in 2016, it was an easy assumption to make that traditional channels like TV would be more quickly abandoned by political campaigns in favor of more cost-effective and targetable platforms like Facebook and the like. Current numbers, however, are suggesting the contrary (political spend through November 2019 shows TV/radio spend is outpacing Facebook threefold) and consumer behaviors and perceptions may be telling us why.

2016 lit multiple controversy flames around data security, privacy, trustworthiness, and reliability. As a result, users' patience is running thin on these relatively immature platforms, so they are placing the greatest trust in TV and looking to scale back on their time spent with digital and mobile.

Because we are still in an age where information reigns supreme, we don't anticipate any major changes to media avoidance rates from prior years. Instead, consumers are turning a more critical eye on channels that were once seen as their friends. The Facebook feed is the number one channel respondents plan to avoid in the coming cycle. Snoozing, or flat-out blocking, friends on social media, suspending social accounts entirely, and downloading ad blockers will be the digital trends of 2020, while video and audio are set up as the marquee destinations to tune out the political drama. Most recently, we've seen Spotify hedge their bets on consumer preferences as they announced they will stop accepting political ads in 2020 after Twitter banned them altogether. Marketers must not only stay current on political ad policies by platform to identify digital white space, but shed the assumption that TV is a dying platform for political news and entertainment alike.

SOCIAL AND DIGITAL WILL BE HIT THE HARDEST

TV IS STILL NUMBER ONE FOR NEWS AND INFORMATION

TOP RESOURCES FOR GENERAL NEWS



Local TV station (34%)



National TV (23%)



YouTube (7%)



National news website (6%)



Radio (6%)

TOP RESOURCES FOR RESEARCHING POLITICAL CANDIDATES



News on TV (51%)



Online search (34%)



Trusted news sites (34%)



Family (16%)



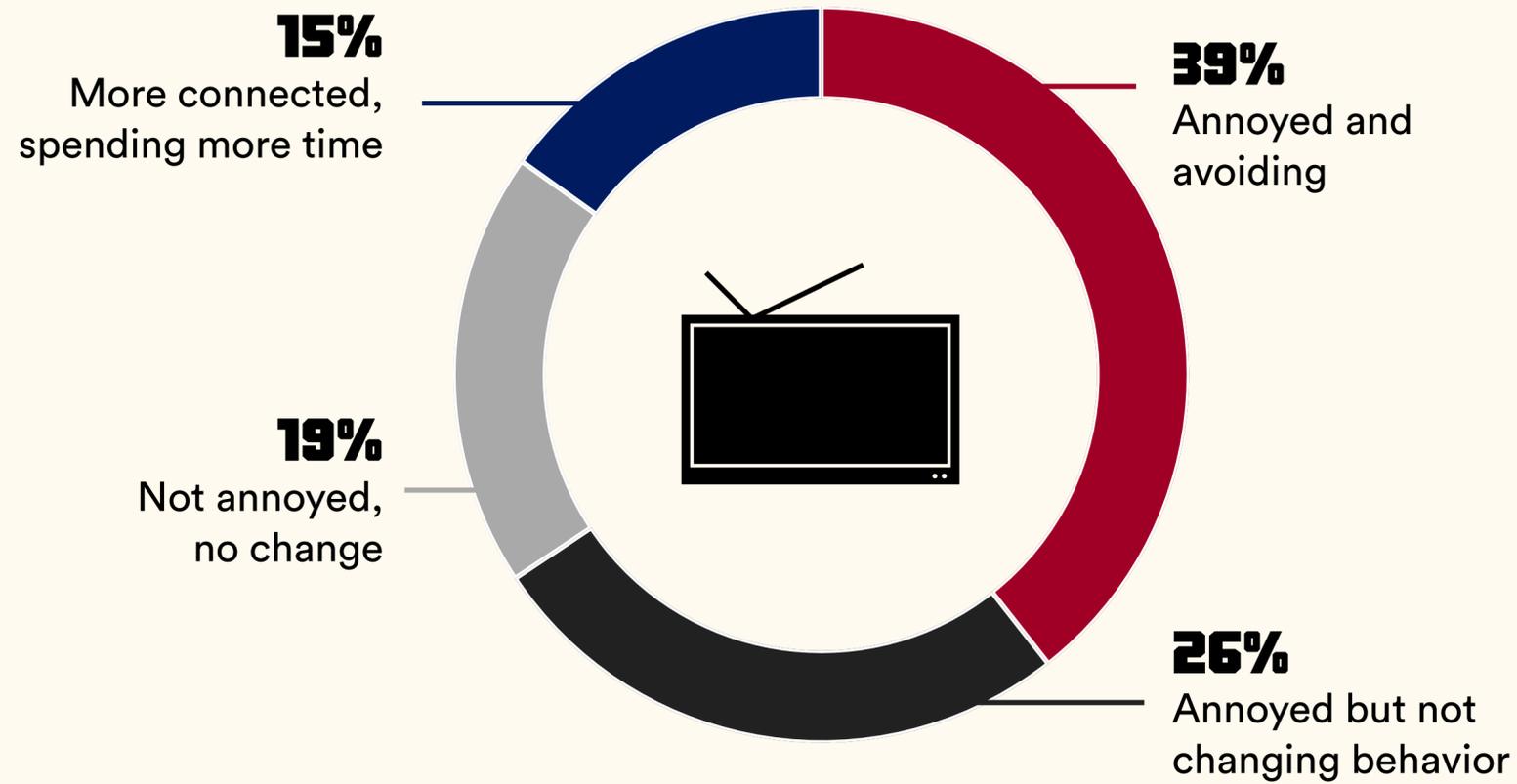
Newspaper (16%)



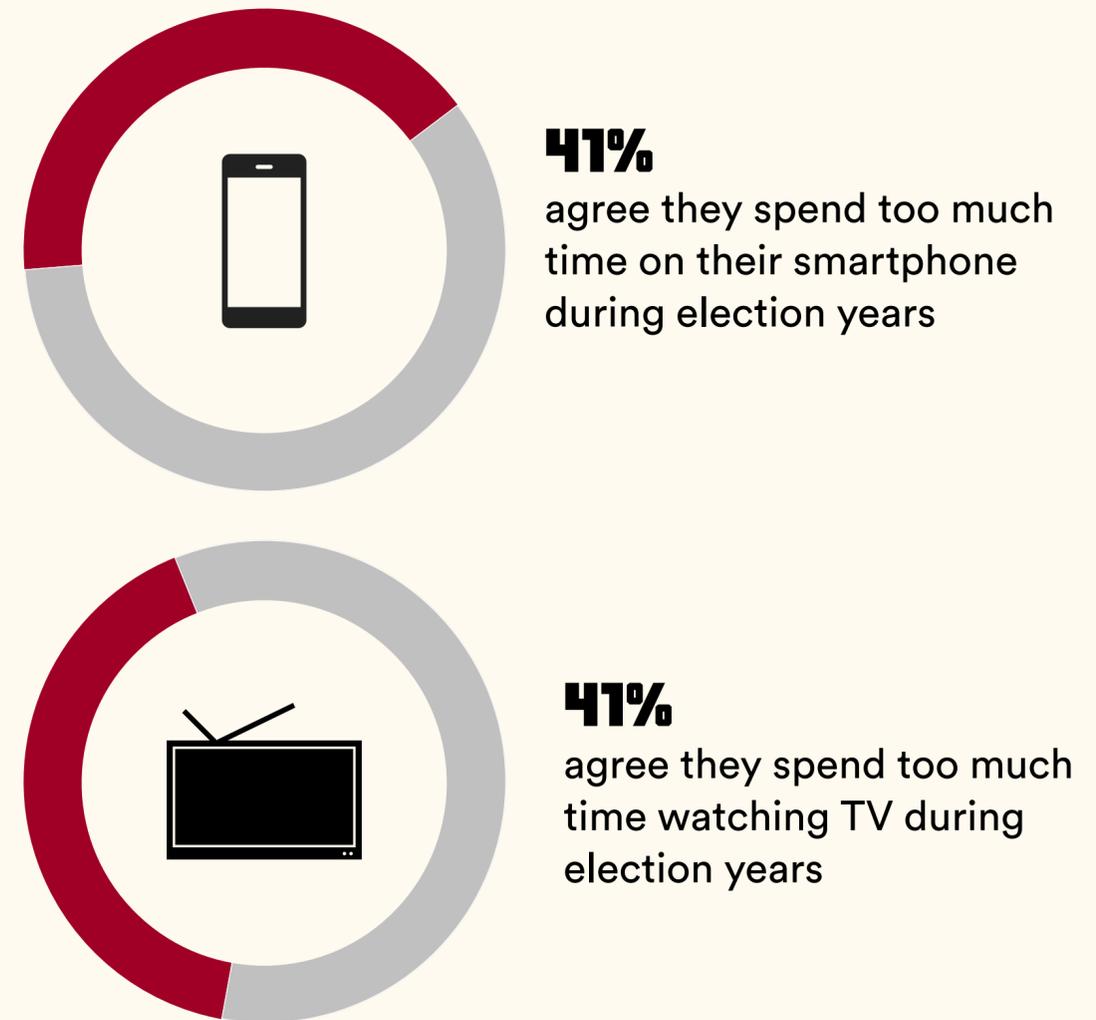
TV IS NOT THE BAD GUY WE THOUGHT IT WAS

IT'S FLAWED, BUT NOT BROKEN

What are your feelings toward your TV during election time?

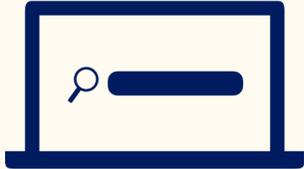


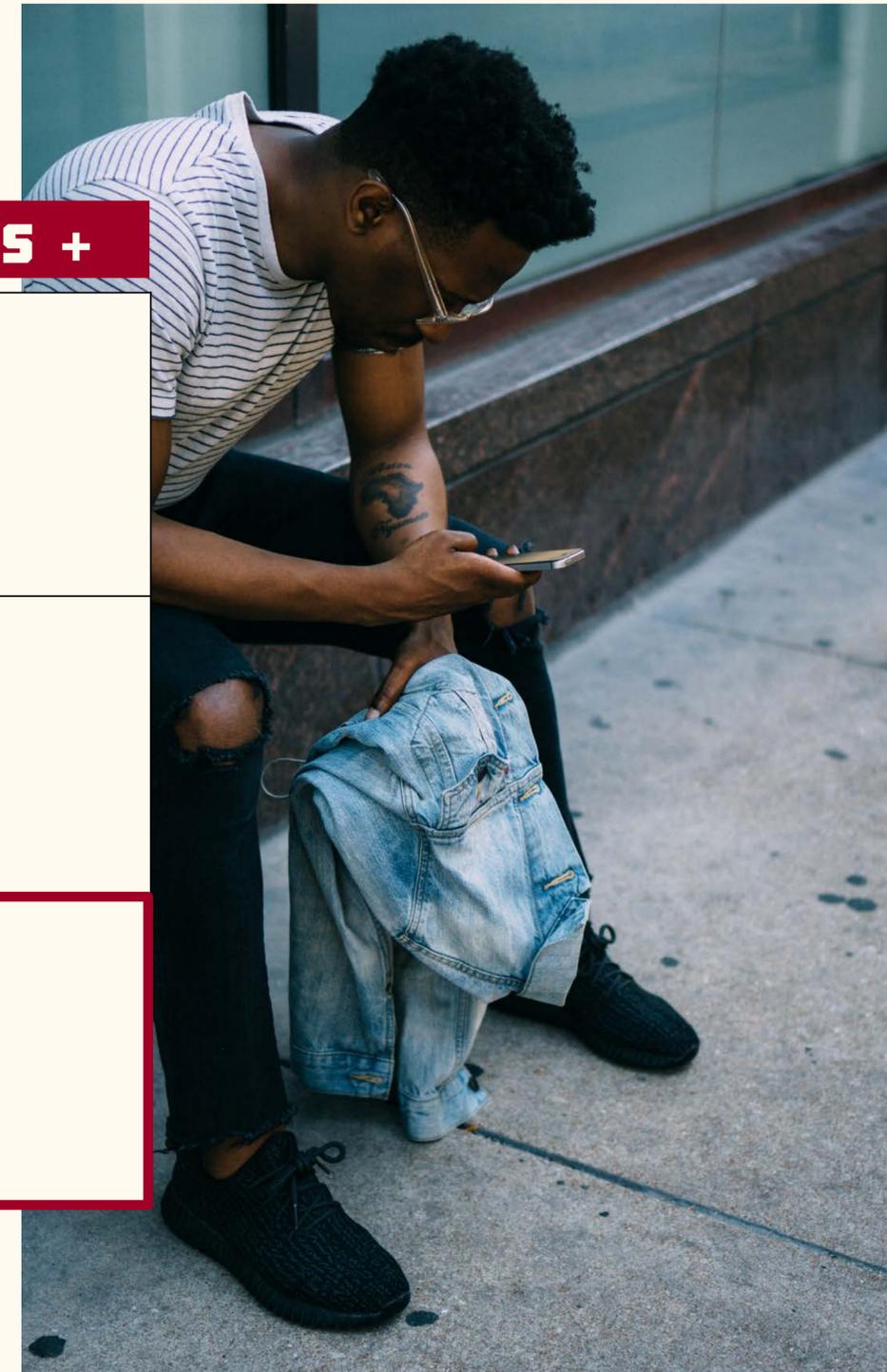
AND IS UNDER THE SAME SCRUTINY AS THE SMARTPHONE



YOUNGER GENS ARE MOST CONCERNED WITH SMARTPHONE TIME

AGREE THEY SPEND TOO MUCH TIME WITH

	GEN Z	MILLENNIALS	GEN X	BOOMERS +
	51%	44%	35%	27%
	58%	57%	39%	16%
	43%	46%	40%	36%



2020 IS A YEAR FOR SELF-BETTERMENT AND BUILDING COMMUNITY

While most can admit that TV becomes more annoying during election years (65%), fewer are actually avoiding the channel because of it. Nearly two-thirds say that they are either not changing their behavior with TV or spending more time with it in 2020.

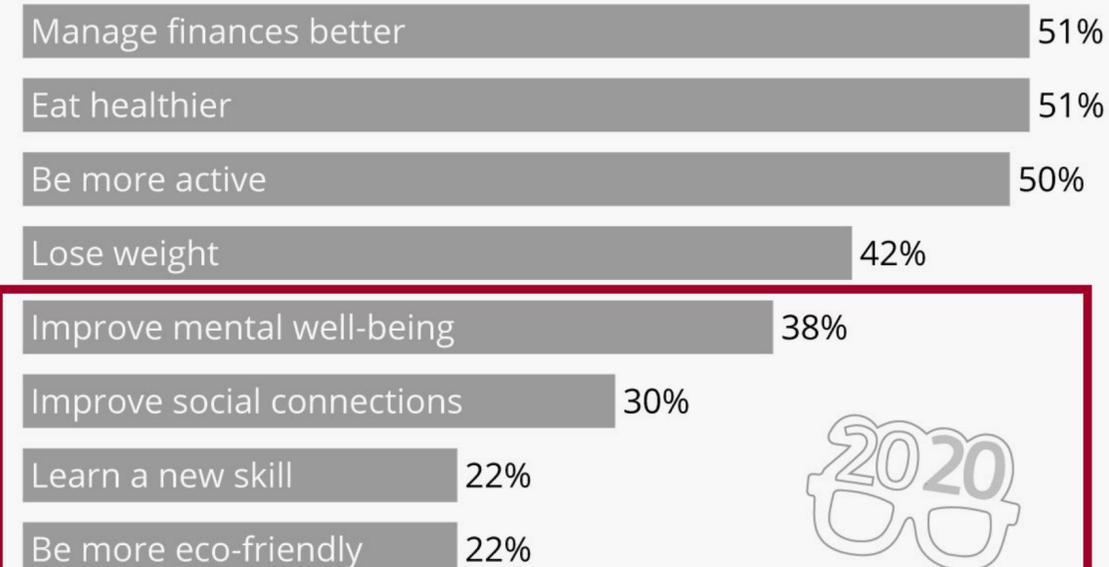
Possibly more surprising, respondents are just as likely to have put their smartphone usage under review as their TVs. Culturally, more and more Americans are beginning to recognize the signs of tech addiction and the anti-social/communal behaviors it entails. Perhaps as a result of an extremely polarizing political era and administration, Americans are more eager to turn off, look up, and take on more personal connections. Millennials and Gen Zers in particular are monitoring their digital usage more seriously, posing a potential threat to the power of digital and the prospective revitalization of the analog.

What my digital detox taught me about the billion dollar mindfulness industry

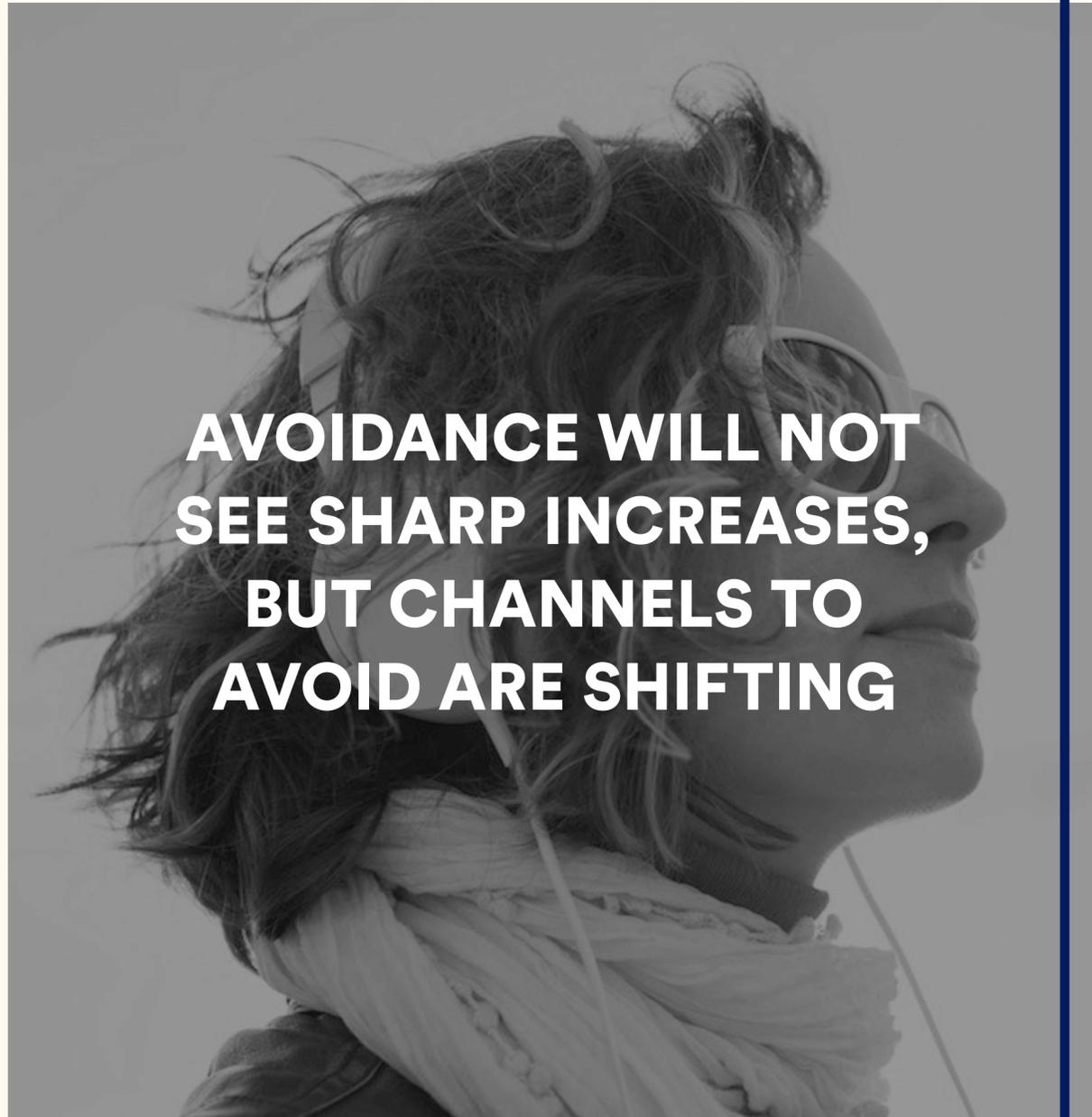
Struggling for New Year's resolution ideas? These digital detox apps could inspire you

America's Top New Year's Resolutions for 2020

Most popular new year's resolutions among those planning to make one or several



Survey of 2,011 U.S. adults, Nov. 12-14
Source: Ipsos for Urban Plates



**AVOIDANCE WILL NOT
SEE SHARP INCREASES,
BUT CHANNELS TO
AVOID ARE SHIFTING**

59%

have avoided some
kind of media during
past elections

Local TV stations (21%)

Facebook feed (20%)

National newspapers (15%)

Cable channels (15%)

Twitter feed (15%)

60%

plan to avoid some
kind of media during
2020 election

Facebook feed (23%) ▲

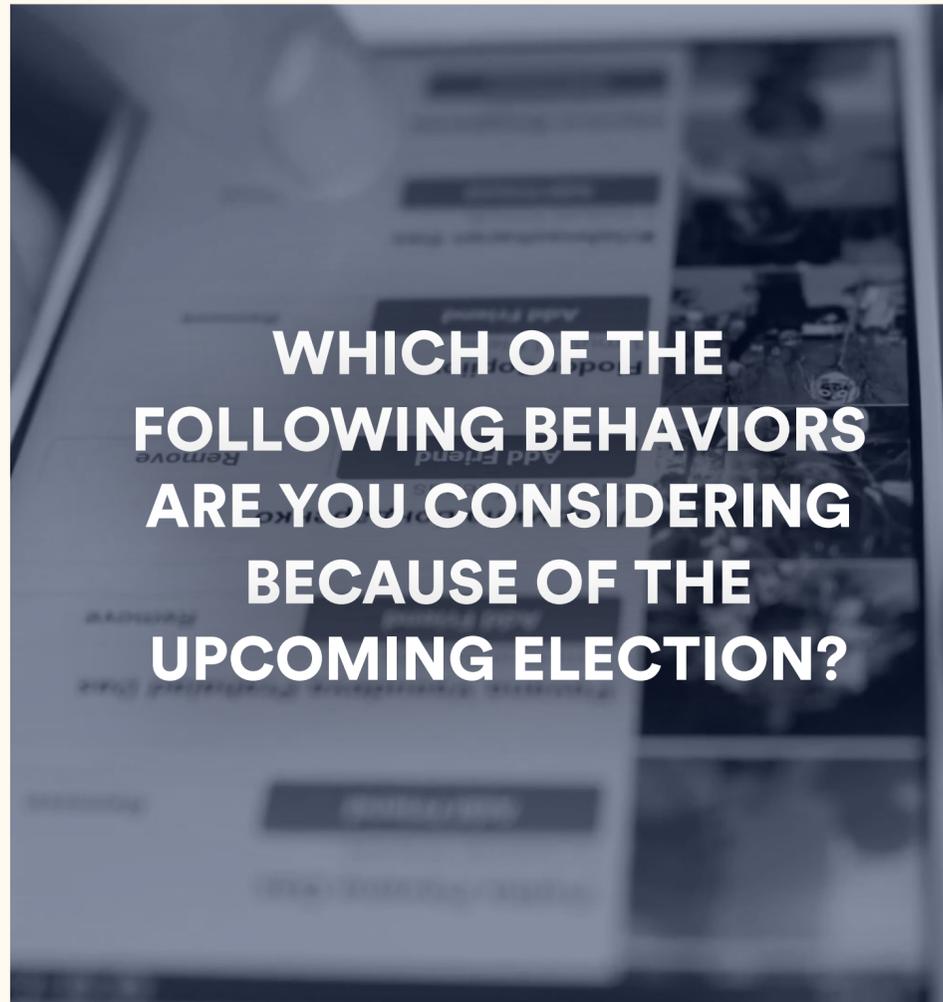
Local TV stations (21%)

Twitter feed (17%) ▲

Cable channels (17%) ▲

Instagram feed (16%) ▲

ANTICIPATED MEDIA CHANGES SKEW DIGITAL WITH SOCIAL GETTING THE AXE AND STREAMING BEING THE WELCOMED SOLUTION



Unfriending, blocking, or snoozing social connection

33%

Watching favorite shows via ad-free or limited ad platforms

29%

Suspending or closing Facebook account

23%

Watching favorite shows on streaming apps

26%

Limiting time on smartphone

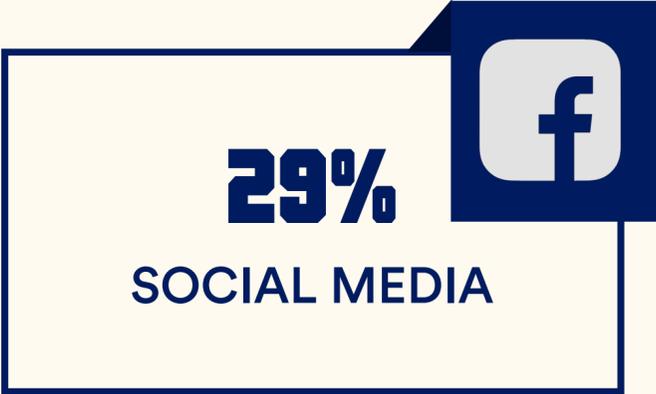
23%

Downloading an ad blocker

26%

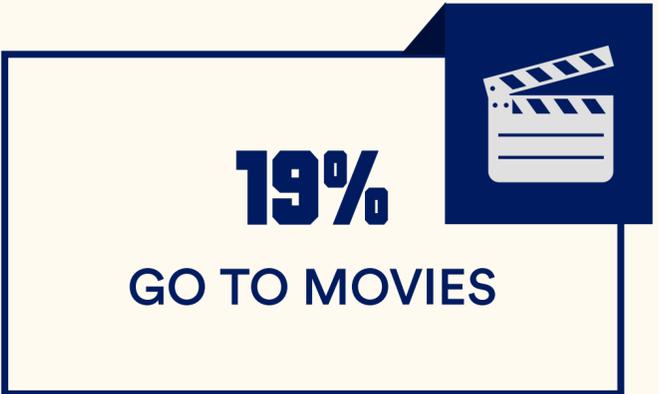
WHAT THEY'D BE WILLING TO GIVE UP TO REDUCE POLITICAL AD EXPOSURE

SOCIAL IS FIRST ON THE CHOPPING BLOCK



DESTINATIONS TO AVOID POLITICAL NEWS, COMMENTARY, OR ADS

VIDEO DOMINATES AND WE RELY ON ENTERTAINMENT LEADERS TO ENVISION A BETTER WORLD





PREPARE TO PIVOT

Potentially a residual of 2016's messy battles on social media, Americans plan to avoid Facebook, Twitter, and Instagram more in comparison to previous years. It's unclear what actual behavior will bring in 2020, especially as political advertising policies have changed on some of these platforms. Regardless, brands should not go into 2020 with the assumption that their audience cannot be reached, period. On the contrary, Americans' equal parts thirst for information and entertainment will outweigh any risks of being annoyed or even misled. Brands must be nimbly prepared to pivot away from social platforms if avoidance does in fact manifest in favor of an analog revival.



IDENTIFY THE ESCAPISM MOMENTS YOUR BRAND CAN PURSUE

In the past year alone, the reach on humor websites has grown at one of the highest rates, followed by music sites like Spotify and Pandora. From pop culture events and album drops to can't-miss movie premieres and video game releases, brands must ask: *What is bound to incite joy among my consumer? What will bring them out of the political vortex or momentarily take them away from their reality?* The answers to these questions may be surprising. By approaching 2020 with a fresh perspective on your target universe, there is opportunity to strike new resonance and respect among an increasingly jaded audience.

Why We Need 'Game of Thrones'

The epic fantasy series is more than just escape. It is a way of imagining our way to the future.

11 Women With Stressful Jobs On The Reality TV Shows That Help Them Unwind

In a cultural moment defined by **moral panic around fake news and alternative facts**, perhaps it shouldn't come as a surprise that the neutral ground Americans of all political stripes have chosen is **storytelling devoted to finding the bad guy, debunking the myth, and exposing how silly humans can really be.**

One of the core purposes of this study was to uncover the new rules for converging brand marketing with politics. It's clear so far that brands must respect the emerging consumer emotions of 2020; the crumbling trust in organizations ranging from media to lawmakers; the push and pull of staying informed without becoming all-consumed; and the desire for mindfulness and balance for better well-being. While these insights have immediate implications for brand messaging and positioning, what about message vehicles and placement? We wanted to find out what consumers really associate with media entities that regularly relay political messages, and the finding was actually very positive news for marketers.

Potentially enlightened by increased involvement in politics in general, most Americans exhibit complete comfortability with separating brands who place media in political vehicles from the vehicles themselves. That is, few actually categorize brands as biased, fake, or worse—anti-American—if they advertise on news networks or programs that are considered those things. In fact, **most don't link any associations between brands and political news entities.**

In an age where brand safety is of the utmost concern, it's possible that brands can be more relaxed when approaching TV/video and shed brand guidelines that blacklist politics. As political conversations have infiltrated more and more media outlets as well as organic conversations, marketers can no longer sequester themselves from it. It's everywhere. The good news? **Branding and politics CAN mix in many environments without diminishing the brand.** No, you don't have to enter the conversations with a position or opinion, but odds are that brands will need to be present among those conversations in order to attain awareness and top-of-mind goals.

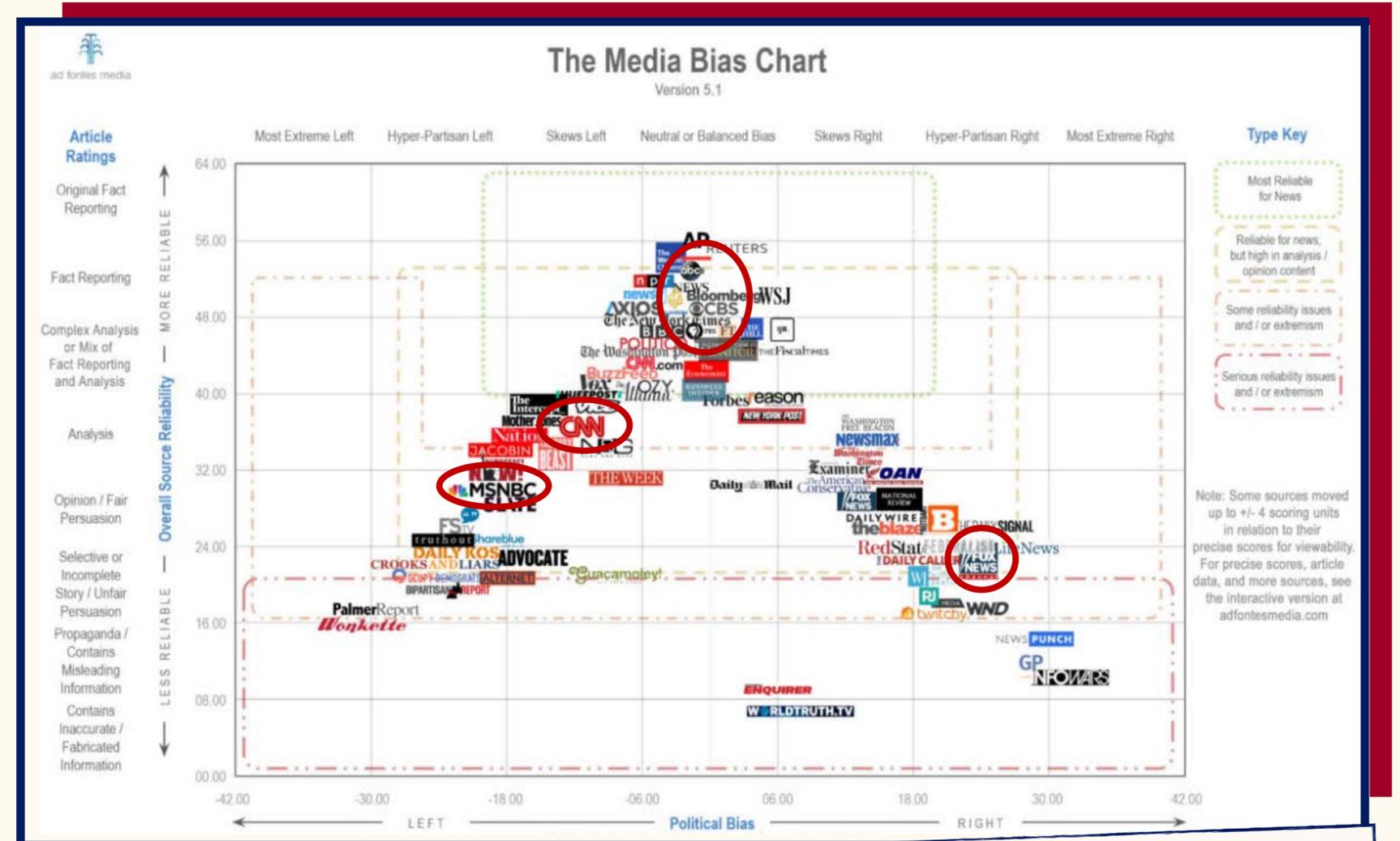
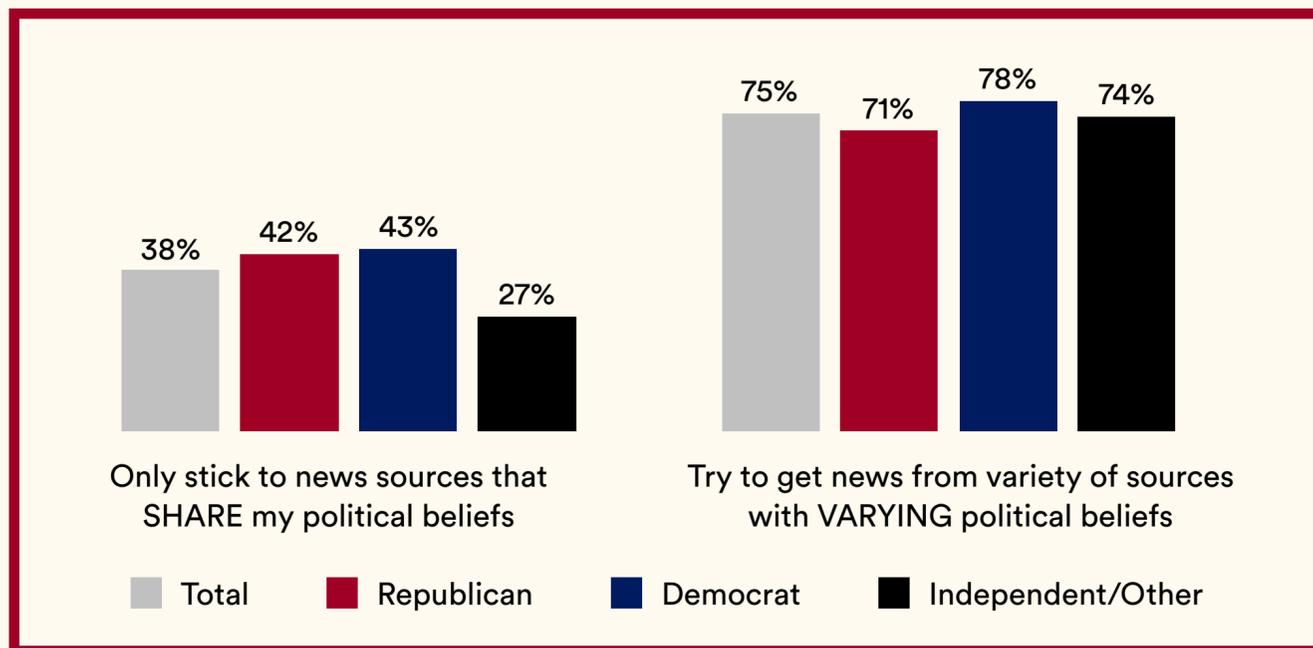


***VOTERS ARE SAVVY
ENOUGH TO
SEPARATE BRANDS
FROM POLITICS,
MAKING MOST
ENVIRONMENTS
SAFE IN 2020***

CONTENT BIAS DOESN'T STOP CONSUMPTION

According to Ad Fontes Media's independent review of media bias, ABC News, CBS News, and PBS rate as the most neutral and reliable video news sources. On the left-hand bias, CNN and MSNBC are considered reliable while also containing a higher volume of opinion content, while on the right-hand side, Fox News is considered "hyperpartisan," teetering on selective and incomplete reporting.

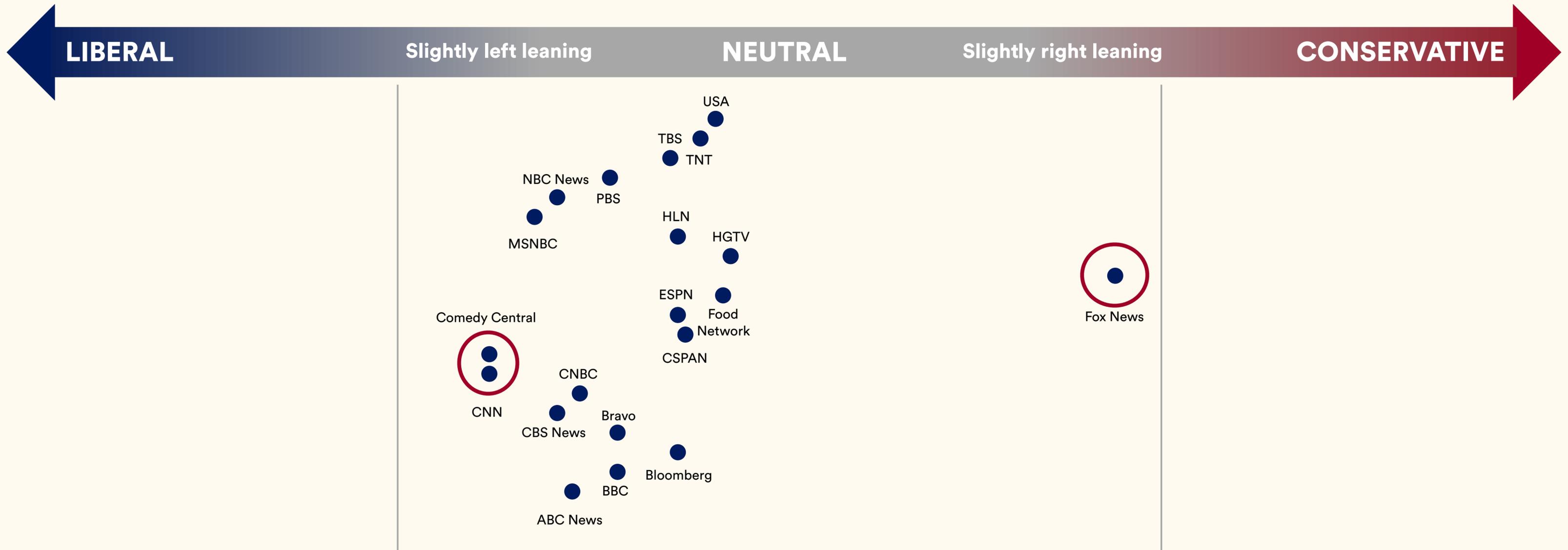
Despite all this, we know that cable news ratings are still booming, and this may not be strictly driven by like-minded, shared-belief viewers. Respondents on both sides of the aisle are prone to diversifying their news sources, stating that the practice yields well-rounded viewpoints that counter balance bias.



Media bias is OK - if it's honest
 Conservatives are more open to leftwing arguments when they come from people who don't pretend to be perfectly objective

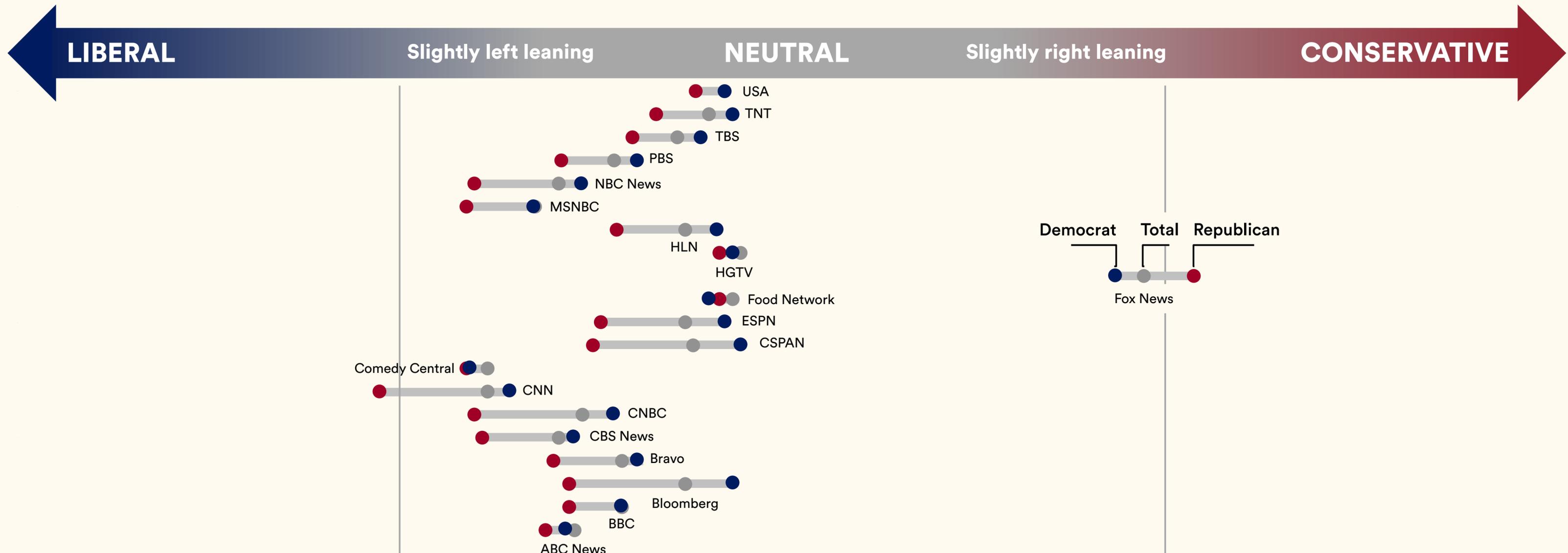
AMERICANS HAVE THEIR OWN PERCEPTION ON BIAS, TOO

Among TV networks tested, most are perceived as politically neutral by the average American, but with a slight left lean. ABC News, CBS News and PBS—while considered neutral by third parties—are actually perceived as more liberal. Consistent with the Media Bias Chart, Fox News, CNN, and MSNBC are the most partial news networks with a surprising lifestyle network (Comedy Central) scored as equally left.



REPUBLICANS CARRY A MORE SIGNIFICANT CHIP ON THEIR SHOULDER WHEN IT COMES TO BIAS

It's no secret that TV has fewer conservative outlets and personalities than liberal ones. As a result, it appears that this trend has engrained a bias sensitivity into Republicans. They rated all (but one) measured networks as more liberal than the total sample. They conversely view Fox News as more conservative than the rest of the sample, indicating a greater affinity. Democrats, on the other hand, are interestingly more likely to view Fox News as more neutral than the rest of the sample and tend to acknowledge the liberal tendencies of today's TV landscape, especially on Comedy Central, ABC News, and even Food Network and HGTV.

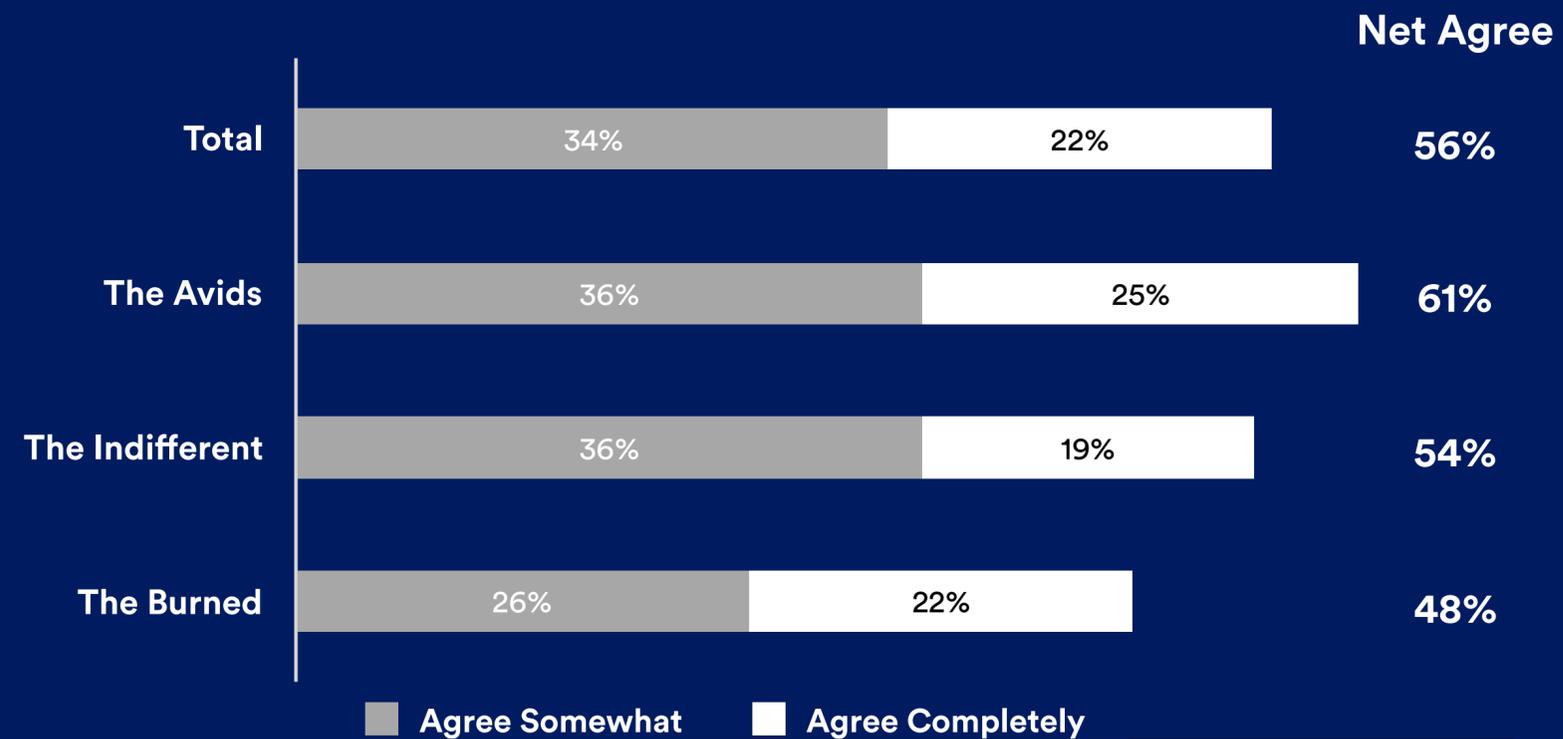


DESPITE THE THREAT OF BIAS AND DISTRUST, POLITICS ARE FAIR GAME IN SOCIAL CIRCLES

TABOO NO MORE

Modern-day society has promoted a lower sensitivity threshold when it comes to politics. Despite the fact that many were raised with the notion that you shouldn't willingly talk about politics, the majority of America now believes that the topic should be discussed in the open and not filed under the old-school conversational etiquette.

I CURRENTLY BELIEVE THAT YOU SHOULD DISCUSS POLITICS WITH OTHERS

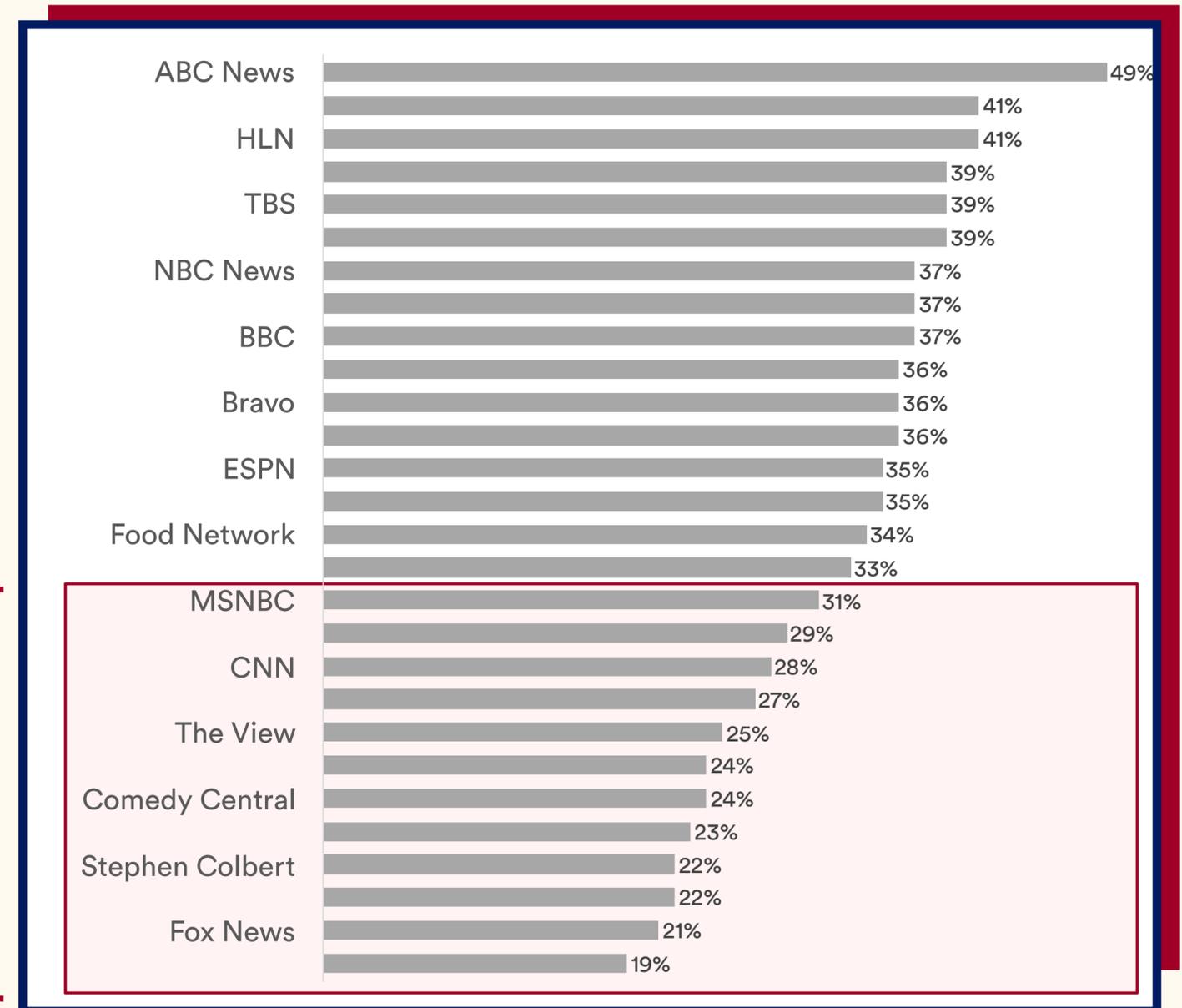


COMMERCIAL BREAKS DRAW A LINE OF NEUTRALITY

America’s “tough-skinned” attitude toward politics is likely the driving force behind its ability to separate brands from political messaging and media. Ads in politically ridden networks don’t provoke many pearl-clutching reactions. In fact, they hardly provoke *any* reaction. When considering their video investment plans for the coming year, brands can be put at ease when considering most of the networks to the right.

It’s the networks and programs drawing lower neutral sentiment to evaluate their place (if at all) in media plans based on other emotions they provoke.

If any, what do you associate with brands that advertise on the following TV networks or programs? (Net: No association)



BIAS IS NOT THE ONLY ATTRIBUTE TO MEASURE

Even those networks and programs lacking neutral linkage to advertised brands do not necessarily mean “off limits.” As we’ve come to learn, bias isn’t everything and is a far cry from a deal breaker. **Brands must also consider the incremental emotional value the media channels represent.** For instance, at first blush, Comedy Central programming and other political satire may feel like an investment suicide due to their left-leaning perceptions. But while they admittedly present bias, they also bring joy and levity to the viewer; offering a magical mix of news and much-needed lol moments.

Other cable news networks and programs will require customized evaluations by brands. While they may not be off limits for some—depending on offering and differentiation—they carry more baggage than other news outlets. Brands should work closely with their media partners to conduct a thorough evaluation of squirm provoking vehicles this election cycle.



★FAREWELL, 2019

Similar to previous years, we can surely expect natural ups and downs in 2020. Despite the fact that we kicked off the year with an impeachment trial, 74% of Americans feel optimistic about the year ahead and there is no reason brands shouldn't be either.

★ARE YOU READY? ★GOOD. ★SO ARE WE.

★ POLITICAL ★ PREPARATION ★ CHECKLIST

- Know your market and the composition of political tribes to truly understand the treatment of political dollars on a local level
- Plan early to evaluate the impact of primaries and debates in your local markets
- For more youth-focused brands, create empathy for the emerging generation of voters
- Identify media and comms environments that represent a healthy balance of information, truth, and levity
- Prepare for the mindfulness movement and don't underestimate analog
- Take comfortable risks in biased arenas



FIVE STEPS TO SPARK EMPATHY AND RELEVANCE WITH EACH TRIBE

★ THE AVIDS

★ THE INDIFFERENT

★ THE BURNED

1	Acknowledge where they're coming from	Being informed comes with the burden of knowledge. Knowing what they know and caring as much as they do can be an all-consuming, full-time job with no off button.	Politics and election time are riddled with unnecessary discord. Life is already messy and difficult. Why pile on more drama?	Election time brings feelings of isolation as they're more likely to have different ideologies than other groups like family and friends.
2	Address their unspoken needs	Give me information and sophistication.	Let's talk about something else.	Give me a voice, a fresh perspective, and something I can trust.
3	Authentically align with mutual interests	Government social care initiatives Immigration Environmental causes Racial discrimination LGBTQ+	Protecting second amendment Securing borders Less screen time for kids	Race representation in media Body-positive movement Female empowerment Gender equality Black Lives Matter
4	Offer solutions in media that pivot away from the negativity They describe elections as:	Nerve-racking Combative Exciting Informative Patriotic	Annoying Dramatized Combative Childish Unnecessary	Nerve-racking Annoying Disappointing Disruptive Overhyped
5	Anticipate their voting journey to identify receptivity and white space	They already know they're going to vote. (96%)	15% are undecided on if they'll vote; they lack interest and question the voting process.	One quarter say they are undecided on if they'll vote; they've lost faith in the government
		Their decision will be made sooner than in the past because their mind is already made up. They vote straight ticket and are less swayable.	They've done little research right now and will wait until the nomination to decide. They're slightly open to political messages.	They may make their decision later because there is too much (unreliable) information They're open to new perspectives.
		They are in a constant state of information gathering out of passion, not obligation. Non-political marketing will be highly visible as they tune out the rest.	They will be keeping their fingers on the inconsistent pulse of the election cycle. Sitting in swing states, they'll receive a bulk of political investments.	They follow news out of obligation and are mostly seeking refuge from the storm. Due to age and race, they may be suppressed from some political messaging.

WHERE TO FIND EACH TRIBE IN 2020

★ THE AVIDS

★ THE INDIFFERENT

★ THE BURNED

	★ THE AVIDS	★ THE INDIFFERENT	★ THE BURNED
1 Preferred channels for news and research	National and local TV are reliable, unbiased, and have the most integrity.	Local TV is reliable and how I've always gotten my news.	Local TV if I must, radio, and YouTube are non-disruptive, and I can multitask.
	Research is omnipresent: TV, search, news sites, political influencers, and events.	Don't research much, but if I must: TV, newspaper, or family.	Research is best straight from the source: TV, friends/family, social feeds.
2 Most trusted political news sources	Deep range covers basic broadcast sources and niche political interests: BBC, CNN, Fox News, MSNBC, NYT, NPR, PBS, <i>WSJ</i> , <i>Washington Post</i> .	Generally less trusting of political news media and stick to the basics: ABC News, CBS News, Facebook.	Broadcast basics and crowd-sourced entities: ABC News, CBS News, BBC, BuzzFeed News, Facebook, Instagram.
3 Their approach to 2020 and media they plan to avoid	More, more, more news and politics: "I'm more connected to TV because of the information it provides." Occasionally escape politics.	No change, no commitments.	Where possible, turning off and tuning out, equally cutting TV and digital. "I'm at my peak annoyance with TV." Doing a lot of escaping from politics.
	Facebook Local TV Instagram feed Twitter feed	Most don't plan on doing much avoiding; sticking to TV	Local TV Facebook feed Cable TV National newspapers
4 Top escapism outlets	Netflix Going to the movies Music Facebook Online shopping	Netflix YouTube Facebook	Social (Facebook, Instagram, Snapchat) Video (YouTube, Netflix, Hulu) Gaming consoles/Twitch
5 Cable networks associated with escape	ESPN, Bravo, Food Network, FX	A&E, ESPN, History, Discovery	ESPN, E!, HGTV, OWN, BET