

The Streaming Twenties:

Multi-screen media consumption
among persuadable likely voters

a collaborative
report by



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Introducing the 2021 Voters & Media Survey

As political strategists, we spend countless hours gathering information about how voters react to messages, but astonishingly little time learning where and how specific segments of the electorate are interacting with media in the first place. If we want to continue connecting with voters effectively, **it's critical that our research evolves beyond just message testing** and captures nuanced, actionable data on media consumption as well.

Our 2021 Voters & Media Survey investigates where persuadable likely voters spend their time watching, reading, and listening to media today, how much time they spend with content, and how their habits have changed over the past year. We interviewed 600 persuadable likely voters in swing states on the phone and online to learn more about what content and platforms are getting their attention in 2021. **Here's what we found:**

Streaming is becoming the default way of consuming TV content.

Across age groups, 48% of persuadable likely voters report always or mainly watching TV via streaming services, compared with 27% who always or mainly watch broadcast or cable, and more voters reported only having streaming TV at home than only live TV.

Voters over 50 consume digital media at rates equal to or greater than traditional media,

including TV, radio, online videos, and news content. And their digital consumption rates are on the rise, with 35% reporting using the internet more than one year ago, and just 7% using it less.

For voters under 50, digital channels are their primary—and often only—way of consuming media.

More than two out of five voters under 50 don't have any live TV at home, and just 13% report always or mainly watching TV on broadcast or cable.

There's so much more to digital than social media.

More than 7 in 10 persuadable likely voters report seeing digital video ads they could not skip on sports or gaming content, 6 in 10 listen to streaming radio, and nearly 8 in 10 have one or more streaming TV services at home.

Reports of Facebook's demise are greatly exaggerated.

Among likely voters, 59% of women and 44% of men report using Facebook every day. Just 21% and 22% report visiting Twitter and Instagram every day respectively.

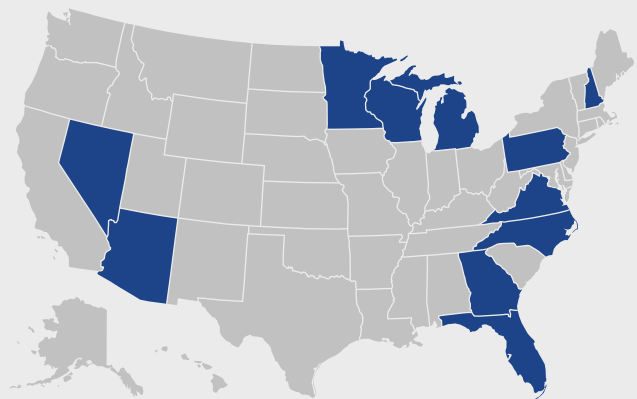
One size doesn't fit all.

How voters consume digital media varies by race, gender, income, education, vote history, and more. To be effective, digital campaigns must be tailored to match the consumption patterns of the specific electorate—and often the specific communities within that electorate.

Methodology

These findings are from a proprietary survey conducted by HIT Strategies on behalf of Rising Tide Interactive. This survey consisted of 600 persuadable likely voters (defined as registered voters with Catalist VCI 30–70 and turnout score 60+) in 12 battleground states (AZ, FL, GA, MI, MN, NV, NH, NC, OH, PA, VA, WI). The survey was conducted via live phone dialing (landline and cell phones) and online sample panel, matched to the voter file.

The survey fielded from April 19th to May 2, 2021, and the margin of error is +/- 4.0%, with a confidence level of 95%.



Redefining “TV”

What does it mean when voters say they’re “watching TV”? Our data show that the concept of television **transcends the traditional family TV set**, and today’s voters are as likely to “watch TV” on an iPhone as on a flatscreen.

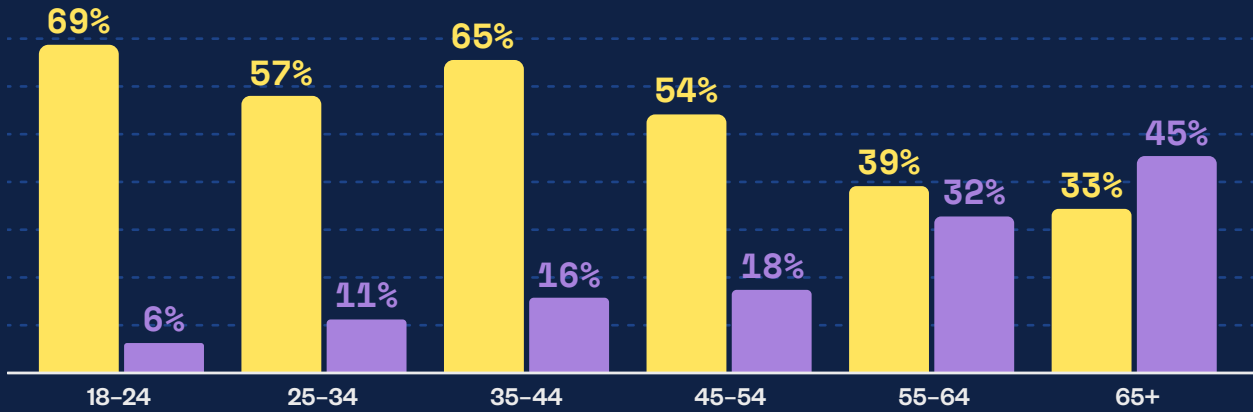
The dominant platform where voters consume television content has shifted to digital as well: Across age groups, 48% of persuadable likely voters report always or mainly watching TV via streaming services, compared with 27% who always or mainly watch broadcast or cable. And voters often aren’t focused on a single screen, with 39% reporting using another device, like a smartphone or tablet, while watching shows on TV.

Among persuadable likely voters:

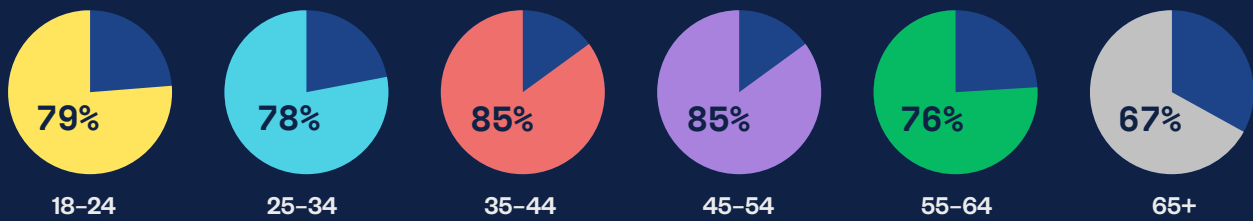


What best describes your TV viewing habits?

- Always or mainly streaming
- Always or mainly broadcast or cable

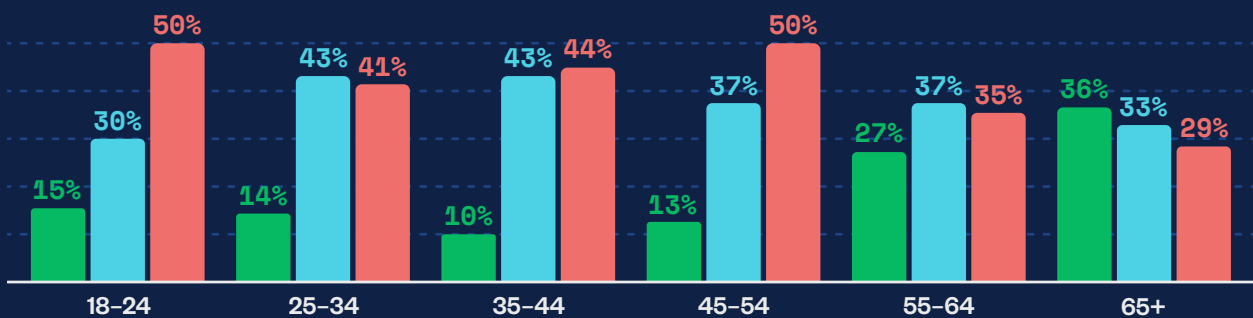


% of voters who have streaming TV at home by age group



When you watch TV at home, what % of the time are you using another device, like a smartphone or tablet?

- None of the time
- Some of the time
- At least half of the time

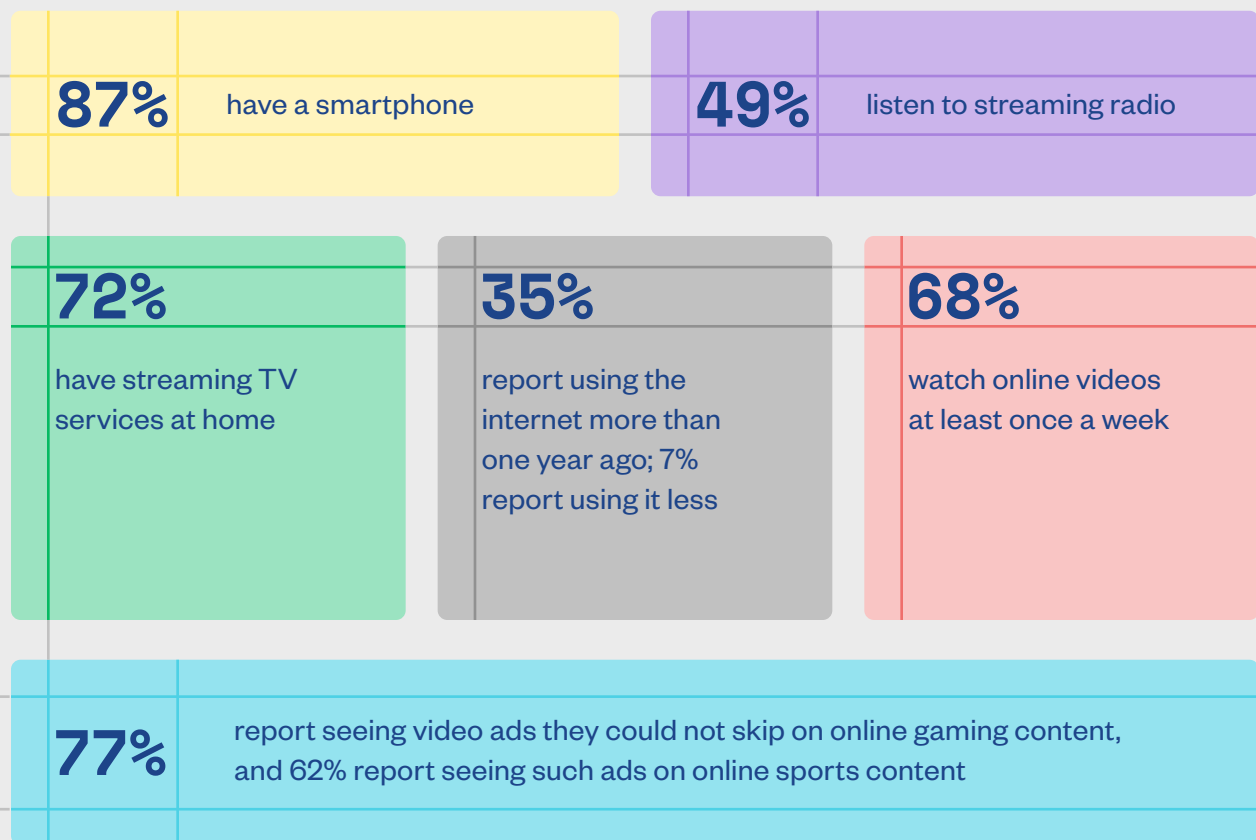


Who is a “digital voter”?

In 2021, all voters are digital voters. While young people are often early adopters, the maturation of the digital space means that today voters who are middle-aged and older are consuming a substantial volume of digital media from a variety of sources, including streaming TV, internet radio, sports and gaming apps, news sites, and Facebook.

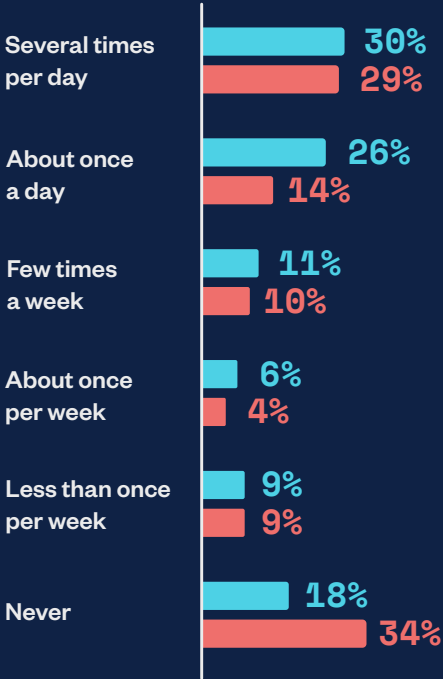
Voters over 50 are using digital channels at rates on par with traditional media, with 39% watching TV via streaming services all or most of the time (vs. 37% for broadcast or cable), and 44% getting news from news websites or apps very often or all of the time (vs. 44% for network TV news, 39% for local news, and 38% for cable news). More than a third of older voters report using the internet more today than a year ago, and more than two thirds watch online videos at least once a week.

Among persuadable likely voters over 50:

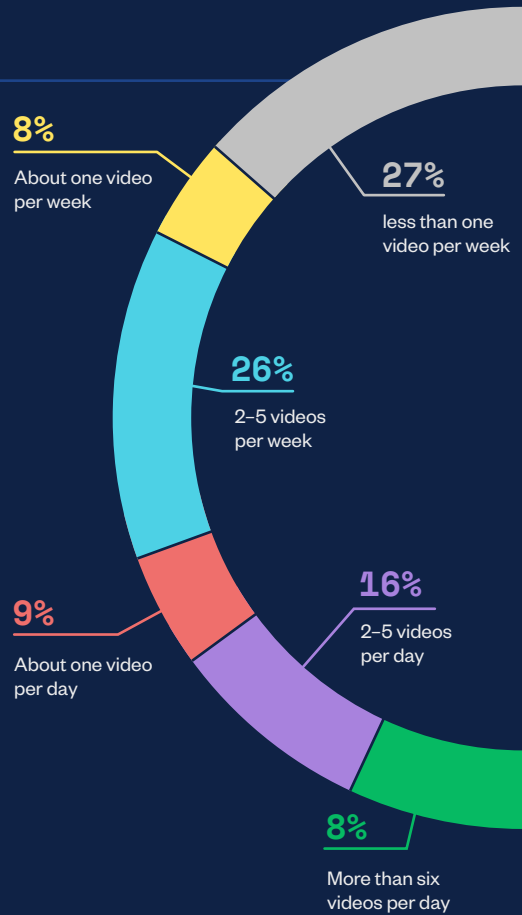


Frequency of Facebook usage among users 50+

Women 50+ Men 50+

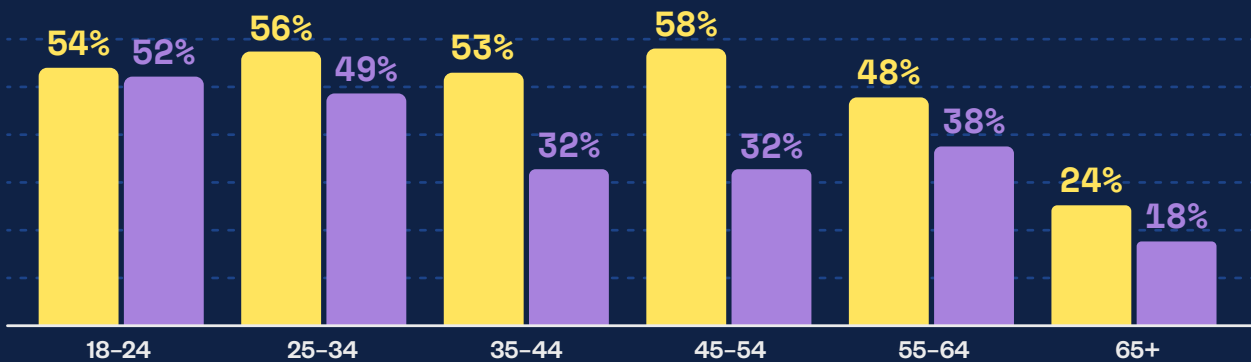


Online video frequency among those 50+



% who use the internet 6+ hours per day, by age group

Weekdays Weekends



Younger voters: from digital first to digital only

We found that **persuadable voters under 50 aren't just online, often they're exclusively online.** They're twice as likely to report getting news from websites or apps as on network, local, or cable TV, and almost five times more likely to report always or mainly watching TV via streaming services than via broadcast or cable.

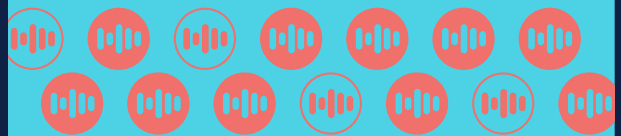
These younger voters are active across multiple social media networks, and are more likely than not to report watching online videos every day. They also like to multitask: 46% report using another device like a tablet or smartphone while watching TV at least half of the time.

Among persuadable likely voters under 50:

41% don't have live TV at home, 17% don't have streaming TV at home.



73% listen to streaming radio, including 32% who listen to at least five hours of streaming radio per week.



46% report using another device like a tablet or smartphone, while watching TV at least half of the time, 41% some of the time, 12% report none of the time.

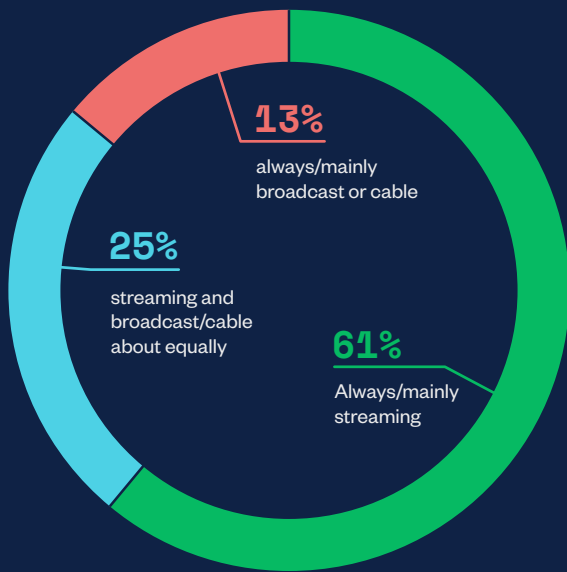


58% watch online videos every day.

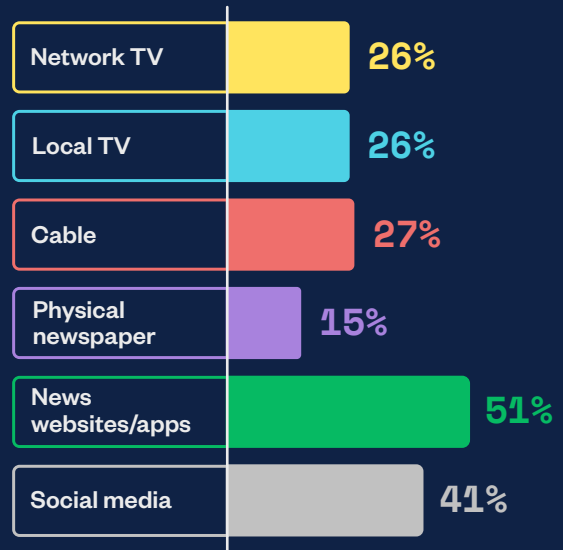


Under 50:

Which describes your TV viewing habits?

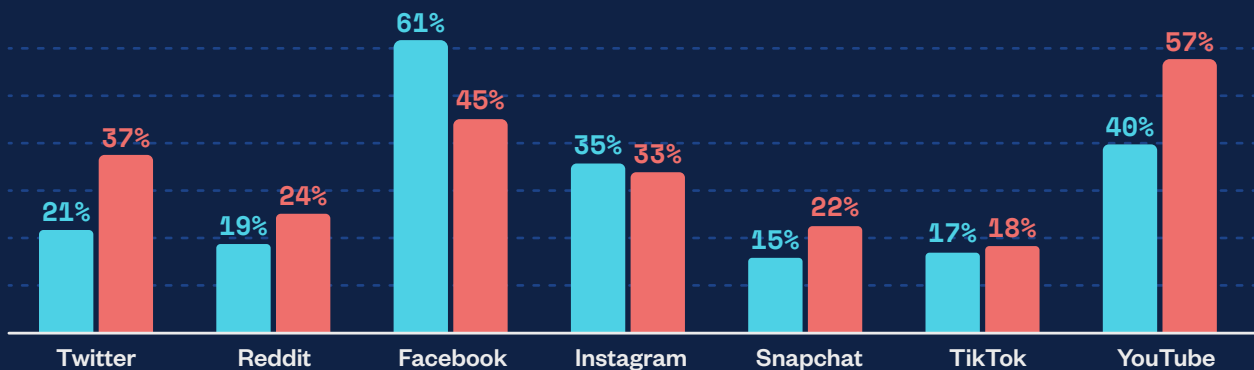


Where do you often get news?



Which social media networks do you use every day?

■ Women under 50
■ Men under 50

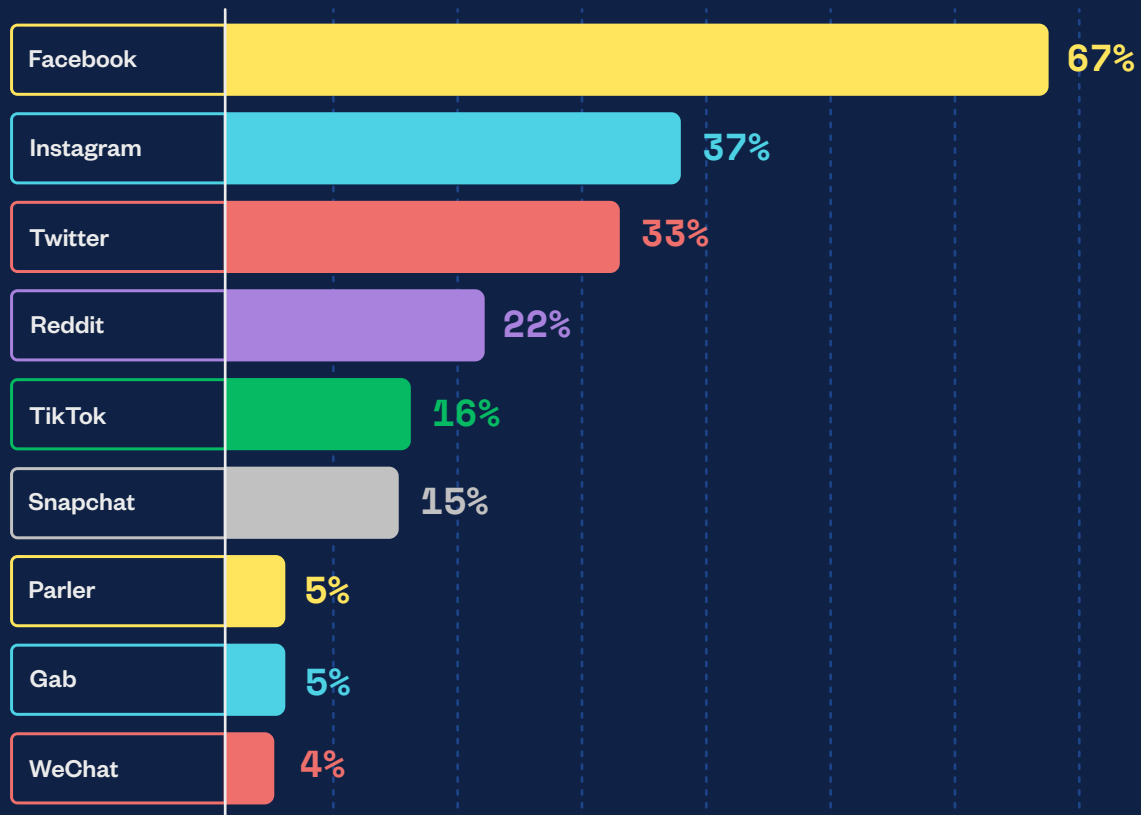


Facebook is still the dominant social network...

Missteps and scandals may have damaged Facebook's brand, but **likely voters are still logging on regularly**, and both adoption and frequency still dwarf those of newer social networks. A majority (59%) of likely women voters report using Facebook every day, with just shy of half (44%) of men logging on daily.

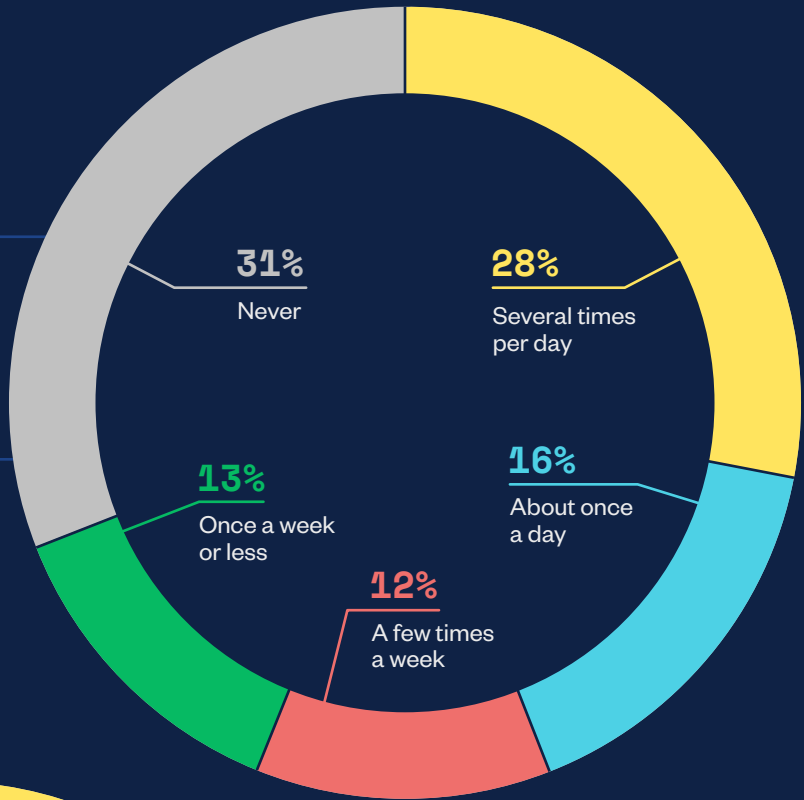
Age is not a strong predictor of Facebook usage, with likely voters over and under 50 using Facebook at approximately equal rates. However, Facebook use shows significant decline as household income increases. The face of the average Facebook user may be changing as well—while most demographics reported using Facebook less than a year ago, women of color reported using it more.

% of persuadable likely voters who use each network at least once per week:

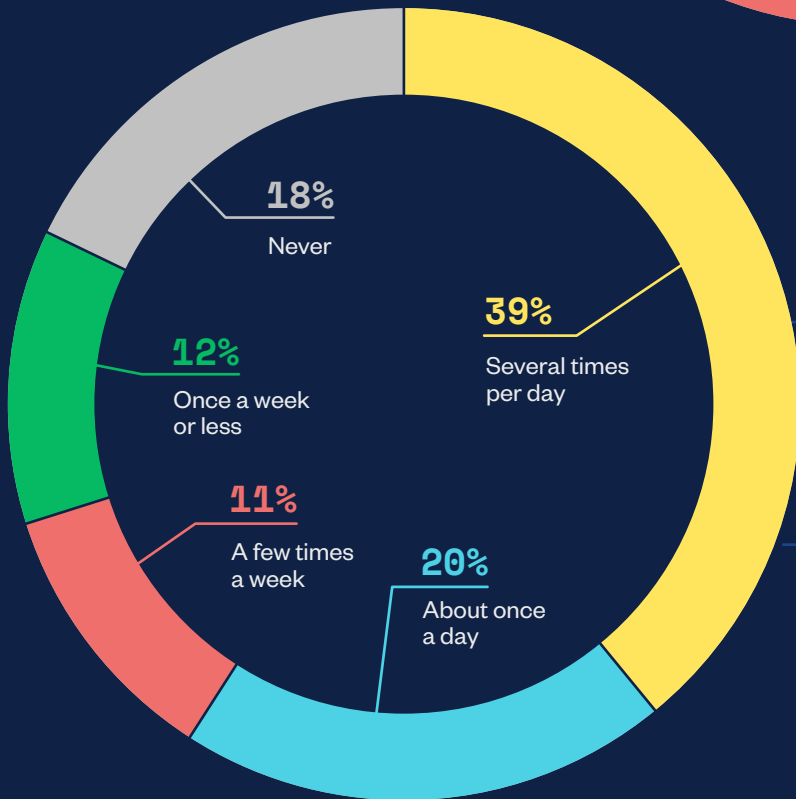


How often do you use Facebook?

Men



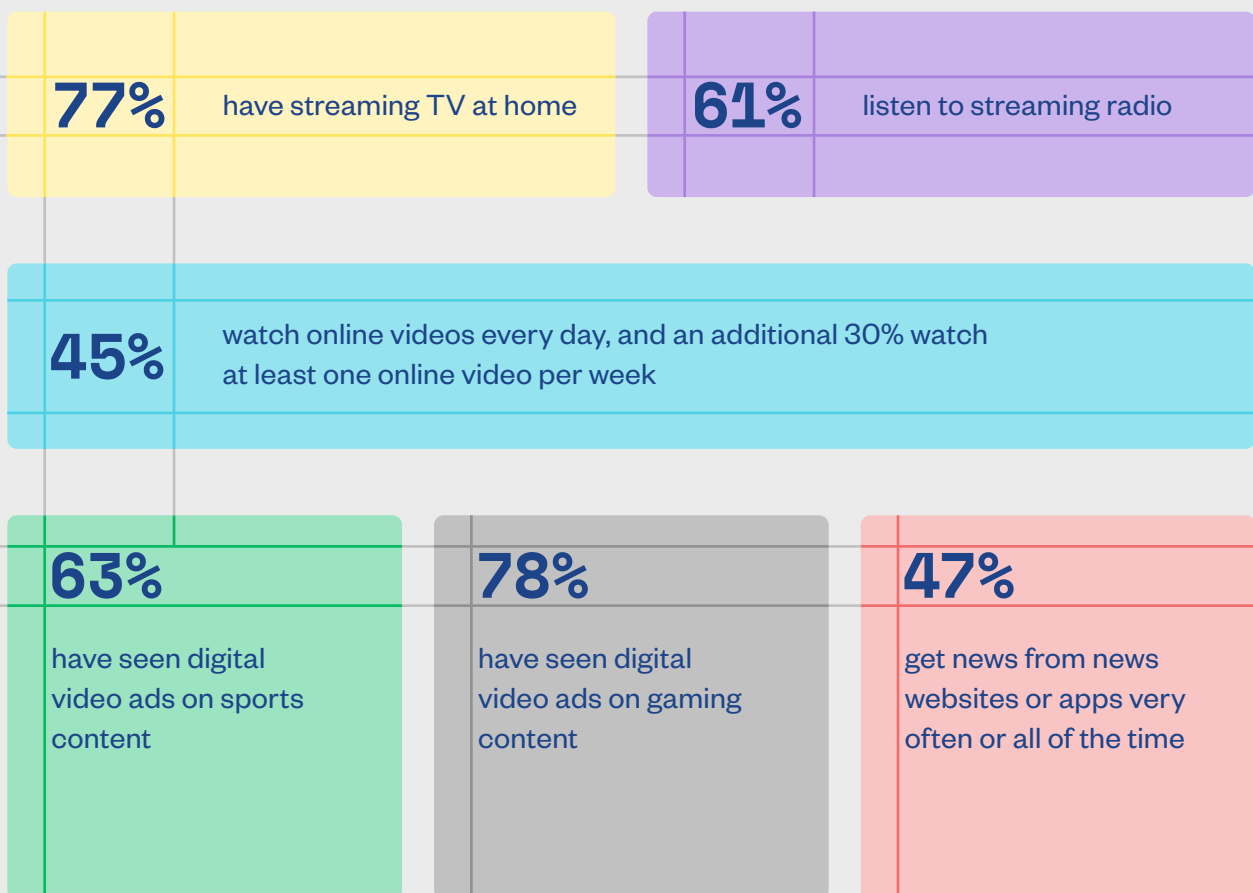
Women



...But social media represents a small fraction of the digital landscape

Voters aren't just logging on to social media sites. In fact, the **overwhelming majority of time likely voters spend online happens outside of the social media universe**, and includes everything from streaming TV and news websites to programmatic video and gaming apps.

Among persuadable likely voters:



What's next:

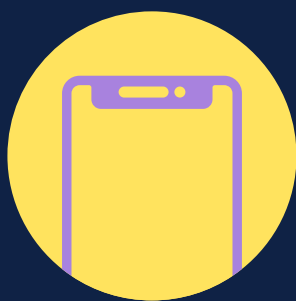
Building effective, data-driven campaigns

The digital media ecosystem is complex, and no two voters' digital consumption patterns are exactly the same. Achieving meaningful frequency within a likely voter audience requires a **nuanced understanding of available inventory across platforms and devices, centering the user** rather than a few particular networks.

This is particularly true for connected TV: streaming may be the new default way voters are watching TV, but the streaming landscape is increasingly fragmented, and buying CTV/OTT inventory is more analogous to digital media planning than traditional TV buying.

Going forward, effective campaigns will consider not just who our target voters are and what messages resonate, but also where these voters are consuming media and how best to reach them. Digital agencies are uniquely equipped to develop and execute complex plans that reach voters effectively across platforms, from connected TV, to streaming radio, to news, sports, and gaming apps, to programmatic video.

Leveraging the experience and expertise of a native digital partner gives campaigns a leg up in a quickly evolving media landscape.





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