



The Race for The White House 2016: Registered Voters and Media and Information During the Primaries

January 2016

Objectives and Methodology

Objectives

The 2016 presidential election campaign is in full swing as both Democrats and Republicans begin the primary season to determine who will ultimately face off in the election.

The IAB (Interactive Advertising Bureau) seeks to understand how media and information are used by those most likely to vote in the election.

Moreover, as digital media continue to grow in importance, it is vital that we understand how all media are used to access information about candidates and issues, which issues are most important and how the potential voters influence each other.

The research seeks to go beyond basic understanding of where best to run advertising by candidates and advocacy groups, and to flesh out the relationship of potential voters to a broad range of sources of information.

Objectives and Methodology

Methodology

The IAB commissioned Vision Critical to conduct quantitative research.

Vision Critical's Springboard America utilized its online panel (~250,000 US members) to administer an online survey questionnaire.

The sample size was 1,513 persons representative of the **US 18+ registered voter population**.

In addition, in order to bolster the sample size of Hispanic registered voters and thus assure the ability to analyze various media behaviors, Vision Critical sampled an augment of n=139 representative of the US Hispanic 18+ registered voter population.

Notes:

- The survey was fielded 11/20/15-11/30/15, one week after the November 2015 Paris attacks.
- This survey utilized a number of standard political research questions.

Summary

Media Usage for Candidate and Issue Information

- As we approach the first presidential primaries of the 2016 election, US registered voters are utilizing a variety of media platforms to gather information about candidates and issues, including both traditional media and digital media.
- Digital media combined are at parity with TV as the primary information sources for information about candidates (61% for digital, 61% for TV) and issues (67% for digital, 69% for TV).

Key Registered Voter Subgroups

- Among total registered voters, 60% report they have been involved in at least one politics and public affairs-related activity within the past year.
- In particular, 17% of registered voters are politically influential as indicated by their involvement in politics and public affairs such as running office or holding office. This group skews male, 18-34, and are more educated and affluent. Political Influentials rely even more on digital media as their top information sources for both political candidates and issues.
- Hispanic registered voters are more likely to rely on digital and mobile sources than TV for political information and are more likely to take actions after seeing digital ads.
- African American registered voters rely on a mix of TV and digital for political information.
- Both Hispanic (67%) and African American (60%) registered voters rely on mobile than the average registered voter (49%).

Summary, Continued

Candidate Ad Awareness and Efficacy

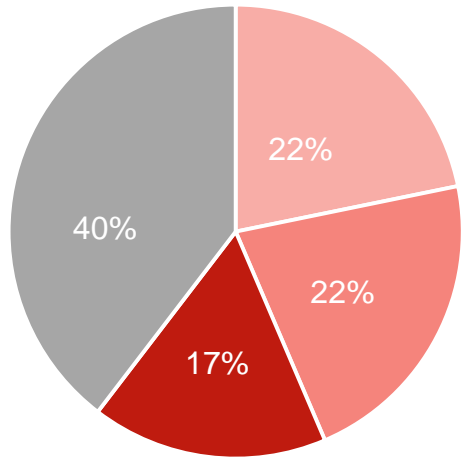
- The majority of registered voters (75%) have seen an ad for a candidate. Those who have seen an ad for a political candidate are more likely to vote in the primary than those who haven't.
- Digital ads are effective in motivating the majority of ad viewers to take actions about candidates, such as searching for more information about candidates (43%), starting an in-person conversation (34%), and clicking on the ad (32%).
- Political Influentials and Hispanic registered voters are more likely than total registered voters to have seen a digital ad about candidates and are more likely to take actions after seeing the ad.

Following Candidates and Political Issues

- The majority (90%) of registered voters follow at least one political issue. Terrorism & National Security, Immigration and Healthcare take the top 3 spots with Immigration ranking #1 among Hispanic registered voters and Job/Wages #1 among African American registered voters.
- Registered voters gravitate towards national news sites (43%) and online media news sites (34%) for candidate information and news. These sites are visited mostly on laptops and in the evening, although Political Influentials are more likely to use their mobile devices.
- Social media constitute an important part of the digital mix as registered voters use social media for information about candidates (28%) and issues (30%). Social media activities can get personal when it comes to politics - nearly a quarter (24%) of registered voters indicate they have 'defriended' or 'unfollowed' someone due to political posts on social media.

Detailed Findings

A majority of 18+ registered voters are politically involved; a small subgroup are the most politically influential



- Social Sharer
- Politically active
- Politically influential
- Passive

Politically Involved

- 60% of 18+ registered voters have been involved in at least one public affairs or politics related activity or event in the past year.
- Three levels of involvement emerge among these politically involved voters:

POLITICALLY INVOLVED

SOCIAL SHARER	POLITICALLY ACTIVE	POLITICALLY INFLUENTIAL
<ul style="list-style-type: none"> • Signed a petition online • Signed a petition offline • Shared or reposted a petition online • Shared or reposted an article about a politician or political issue • Commented on a website, blog or social media about a political issue • Commented on a website, blog or social media about a political candidate 	<ul style="list-style-type: none"> • Contributed financially to a politician or a cause • Contacted a politician at either the local, provincial, or national level • Attended a rally, speech, or organized protest of any kind • Attended a public meeting on town or school affairs • Wrote a letter to the editor of a newspaper or magazine or called a live radio or TV show to express an opinion • Wrote an article for a magazine, newspaper or website about a politician or political issue • Volunteered or worked for a political party 	<ul style="list-style-type: none"> • Started a fundraising effort for a social/political cause • Made a speech about a politician or political issue • Served on a committee for some local organization • Served as an officer for some club or organization • Been an active member of any group that tries to influence public policy or government • Held or ran for political office

Political Influentials are significantly more interested in politics and pay more attention to candidates

Total...

58%

are interested in politics

63%

are paying attention to candidates

90%

voted in 2012 presidential election

94%

are likely to vote in the 2016 presidential election

Politically Involved...

72%

are interested in politics

75%

are paying attention to candidates

92%

voted in 2012 presidential election

97%

are likely to vote in the 2016 presidential election

Politically Influential...

79%

are interested in politics

82%

are paying attention to candidates

96%

voted in 2012 presidential election

99%

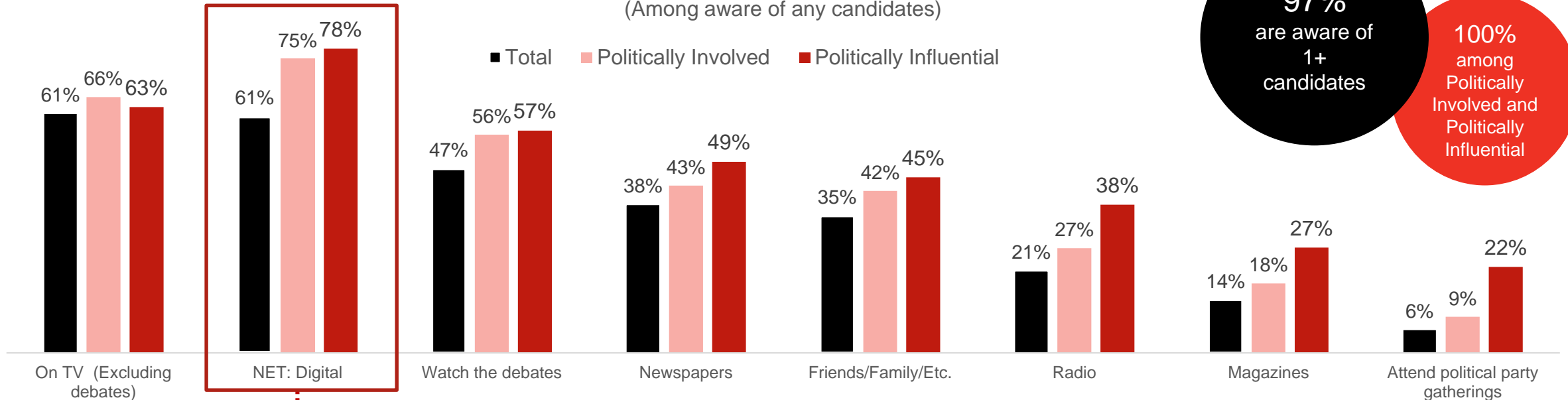
are likely to vote in the 2016 presidential election



Compared to total registered voters, Political Influentials skew male, 18-34; they are more educated and affluent. They are more likely to have an ideological bent and to identify themselves as Conservative or Liberal.







Politically Involved, especially the Influentials, rely on digital sources for candidate information more than TV

Where *They Learn More* About Candidates
(Among aware of any candidates)



	Total	Politically Involved	Politically Influential
Websites using a computer	38%	50%	53%
Online search	29%	38%	41%
Social media	28%	37%	43%
Online video	19%	27%	31%
Websites using a smartphone/tablet	19%	26%	33%
Mobile apps	6%	9%	18%

National news sites are the top sources for candidate info/news, and most visit them on laptops and in the evening

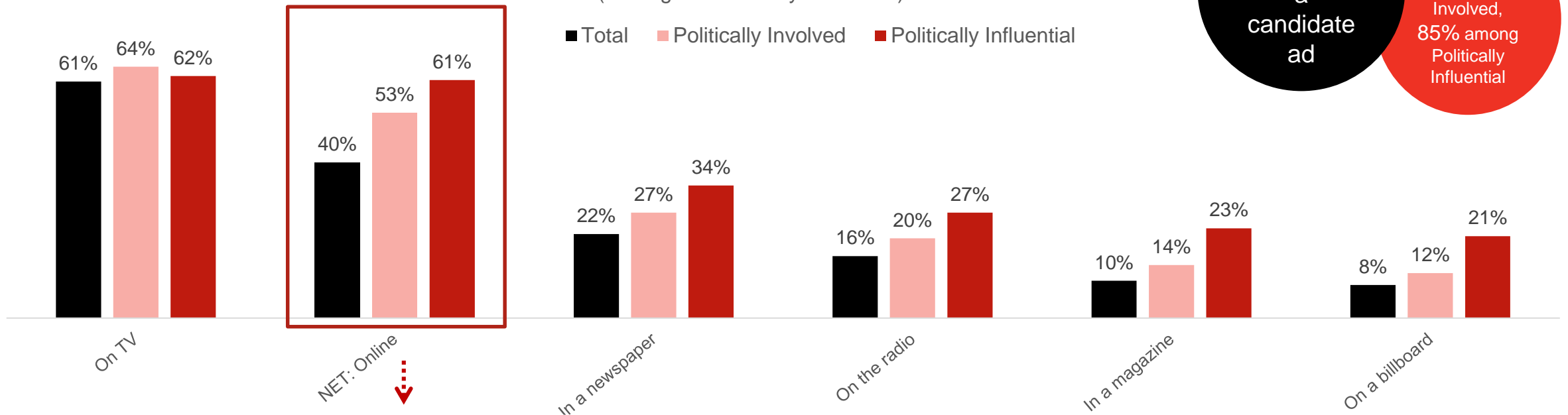
What sites do they use for candidate info/news?			On what device?			At what time? Top 3 shown				
	Total	Politically Involved		Total	Politically Involved	Politically Influential		Total	Influencers	
National news sites <small>(CNN.com, FoxNews.com, HuffingtonPost.com, etc.)</small>	43%	58%		87%	87%	88%		Evening <small>(8:00pm-11:59pm)</small>	62%	63%
Online media news sites <small>(Yahoo News, AOL News, MSN News, etc.)</small>	34%	45%		40%	44%	53%		Morning <small>(6:00am-11:29am)</small>	42%	43%
National newspaper sites <small>(WSJ.com, WashingtonPost.com, NYTimes.com, etc.)</small>	25%	35%		27%	29%	40%		Afternoon <small>(2:30pm-4:59pm)</small>	41%	44%
Local news sites <small>(NBCLosAngeles.com, WGNTV.com Chicago, etc.)</small>	24%	32%	Mobile Device Net	49%	53%	61%				
Local newspaper sites <small>(DailyNews.com, SunSentinel.com, etc.)</small>	22%	30%								
Candidates' sites <small>(HillaryClinton.com, DonaldJTrump.com, etc.)</small>	18%	27%								
Partisan news sites <small>(Politico, The Blaze, etc.)</small>	13%	20%								
Issue-oriented sites <small>(Gun control sites, Union sites, Sites about the environment, etc.)</small>	12%	18%								

Political Influentials exhibit a more pronounced pattern of site usage across the board and over-index on usage on mobile devices.

TV and digital are on par as top sources for seeing ads about candidates among Political Influentials

Where They've Seen Candidate Ads (Among aware of any candidate)

■ Total ■ Politically Involved ■ Politically Influential



75% have seen a candidate ad
82% among Politically Involved, 85% among Politically Influential

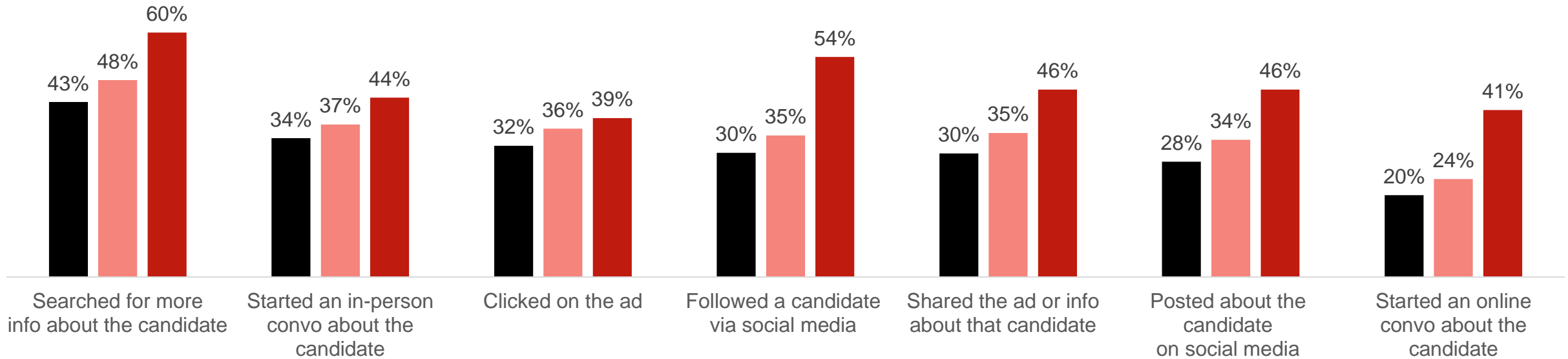
	Total	Politically Involved	Politically Influential
Social media	25%	34%	39%
Website using a computer	25%	34%	41%
Online video	17%	23%	31%
Website using a smartphone/tablet	12%	16%	26%
Mobile app	6%	8%	18%

Political Influentials are most likely to take actions after seeing a digital ad

Actions Taken Based On Digital Candidate Ads

(Among those who have seen a digital ad)

■ Total ■ Politically Involved ■ Politically Influential



74% of those who have seen an online/mobile candidate ad have taken an action

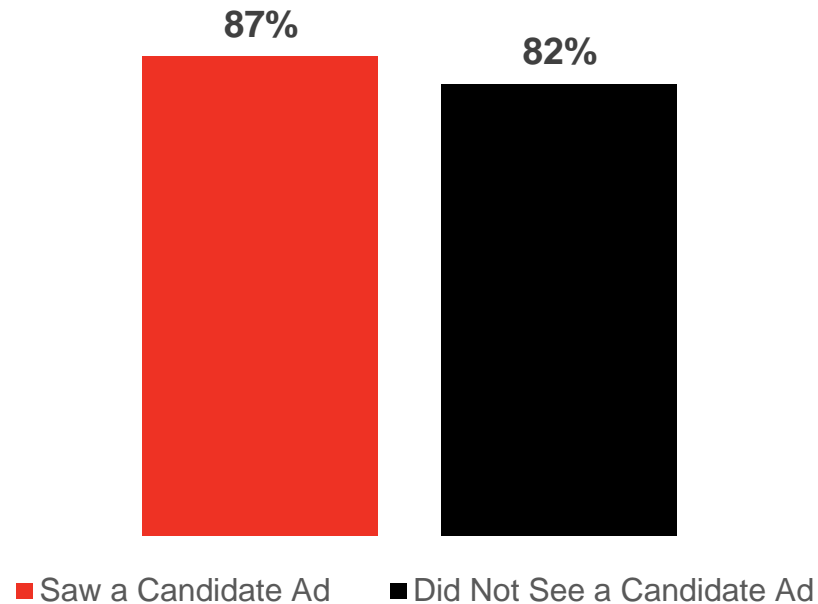
81% among Politically Involved; 86% among Politically Influential

Registered voters who have seen an ad for a political candidate are more likely to vote in the primary than those who haven't

- Most will vote in presidential election, with similar numbers among those who saw an ad (96%) and those who didn't (94%)

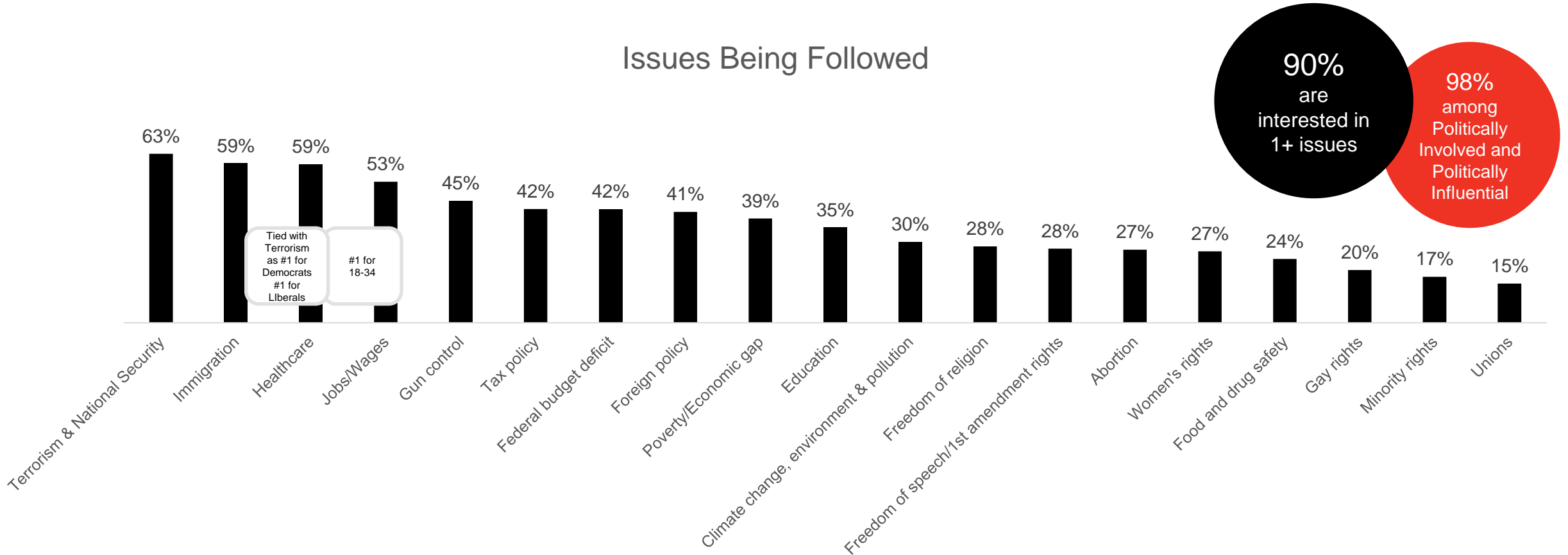
If eligible next year, how likely are you to vote in your state's primary elections?
(Somewhat/Very Likely)

75%
Have Seen
an Ad for a
Candidate



Terrorism & National Security is the top issue being followed by registered voters

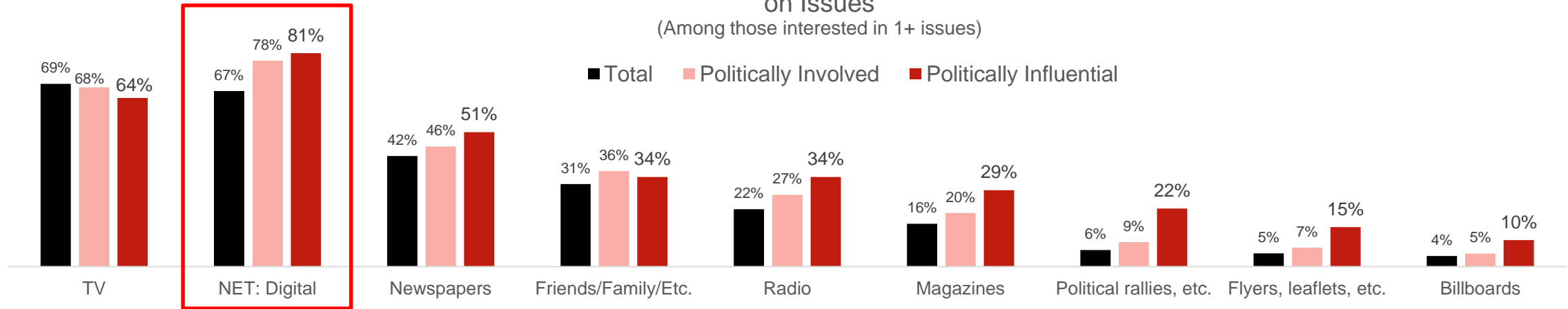
Issues Being Followed



- Terrorism and Immigration tie as the #1 issue to follow among **Hispanics** (57%); they also pay more attention to Minority rights (24%).
- **African Americans** care most about Job/Wages (62%), followed by Healthcare (57%); they pay more attention to Poverty/Economic gap (48%), Education (45%), and Minority rights (34%).

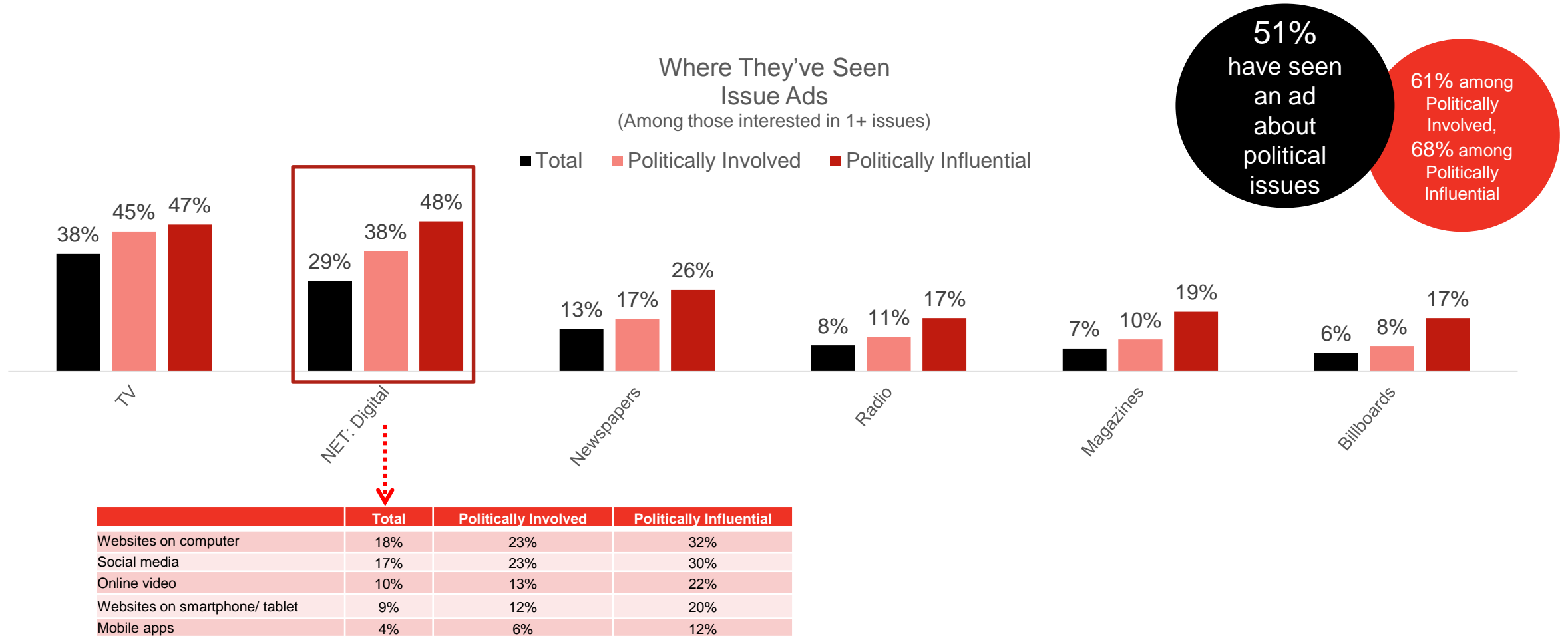
And over 2/3 of registered voters get political issue information and news online - on par with TV

Where They've Gotten Info/News on Issues
(Among those interested in 1+ issues)



	Total	Politically Involved	Politically Influential
Websites on computer	45%	55%	55%
Social media	30%	38%	38%
Online search	29%	37%	43%
Websites on smartphone/tablet	21%	27%	32%
Online video	15%	20%	28%
Mobile apps	7%	10%	16%

Recall of issue ads is lower than recall of candidate ads; Political Influentials are more likely to see issue ads on digital sources



51% have seen an ad about political issues

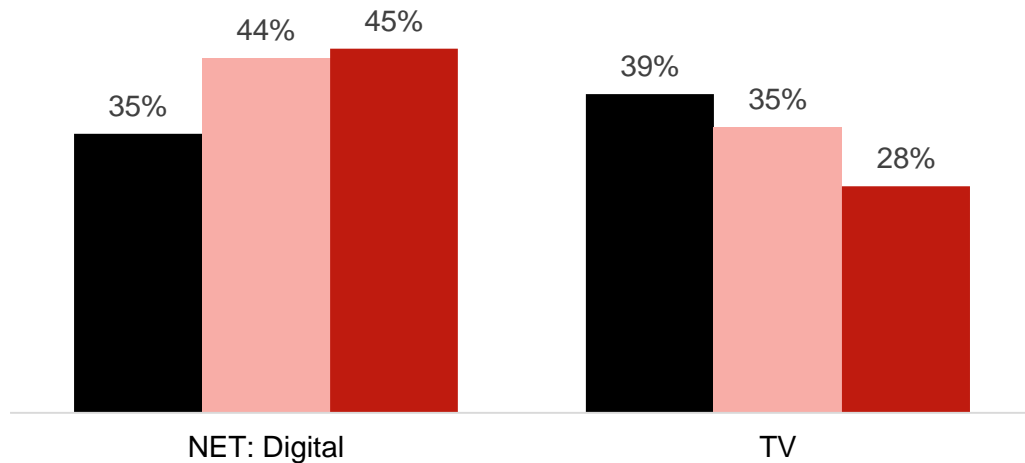
61% among Politically Involved, 68% among Politically Influential

Over a third of registered voters say digital will be the most important way to get candidate and issue information for the 2016 elections

Among Politically Involved and Politically Influential, digital sources surpass TV as the most important source for candidate and for issue info they will use in this election season

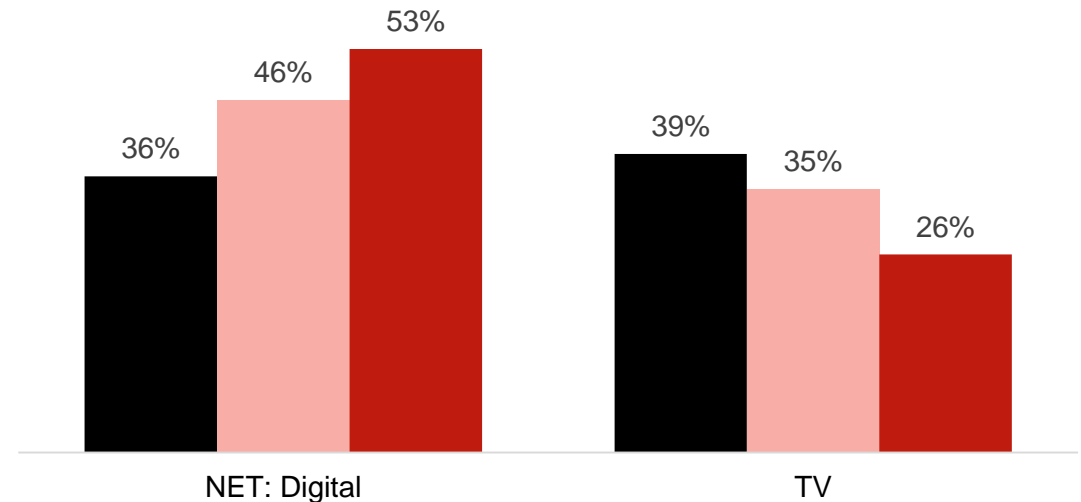
Most Important Source for Candidate Info

■ Total ■ Politically Involved ■ Politically Influential



Most Important Source for Issue Info

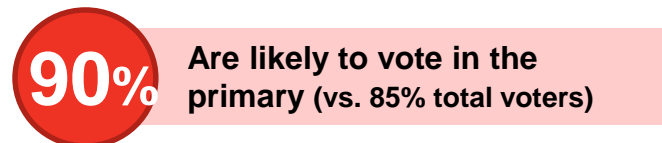
■ Total ■ Politically Involved ■ Politically Influential



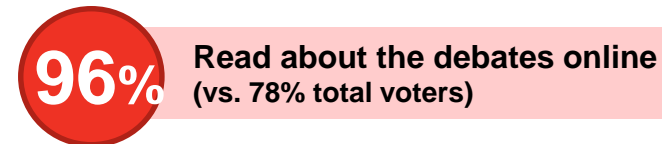
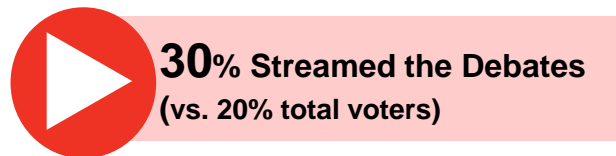
And those who say digital will be the most important way to get candidate information are younger, more likely to vote and more involved with digital ads

Those who Call Digital/Mobile Most Important are More Likely to be Younger and to Vote

Devices Typically Used to Visit Political Sites



They Get Their Candidate Info Online



They are More Likely to See and React to Digital Candidate Ads



Q16. What would you say is the most important way you will gather information and learn more about the candidates this election season?
 Q1b. On a scale of 1-5, how much attention are you paying to candidates for party presidential nominations?
 Q3b. How did you learn about any of the Democratic/Republican candidates?
 Q5. Where have you seen ads for any of these party nomination candidates?
 Q6. Have you ever done any of the following after seeing an online/mobile ad for a candidate?
 Q9. How do you typically visit these types of sites for political info/news on the candidates using your mobile device(s)?
 Q9a. On what device(s) do you typically visit these types of sites for political info/news on the candidates?
 Q26. If eligible next year, how likely are you to vote in your state's primary elections?

Hispanic voters rely more on digital and mobile sources for info on candidates and political issues

Median Age of Hispanic Registered Voter: 42

Candidate Info

Digital is Typical Source to Learn About Candidates

Hispanic Voters	68%
Total Voters	61%

Digital Will be Most Important Source for Candidate Info

Hispanic Voters	40%
Total Voters	35%

Issue Info

Digital is Typical Source to Follow Issues

Hispanic Voters	73%
Total Voters	67%

Digital Will Be Most Important Source for Issue Info

Hispanic Voters	46%
Total Voters	36%

67%

of Hispanic voters typically visit political sites on a mobile device (vs. 49% total voters)

30%

of Hispanic voters streamed the debates online (vs. 20% total voters)

Candidate Ads

Have Seen Digital Ads for Candidates

Hispanic Voters	45%
Total Voters	40%

Have Taken Actions After Seeing Digital Ads for Candidates

Hispanic Voters	87%
Total Voters	74%

Issue Ads

Have Seen Digital Ads for a Political Issue

Hispanic Voters	38%
Total Voters	29%

Agree that digital ads for candidates or issues get my attention

Hispanic Voters	47%
Total Voters	27%

■ Hispanic Voters ■ Total Voters

African American voters rely on a mix digital and TV for info on candidates and political issues

Median Age of African American Registered Voter: 47

Candidate Info

TV is Typical Source to Learn About Candidates



TV Will be Most Important Source for Candidate Info



Issue Info

TV is Typical Source to Follow Issues



Digital is Typical Source to Follow Issues



TV Will Be Most Important Source for Issue Info



60% of African American voters typically visit political sites on a mobile device (vs. 49% total voters)

30% of African American voters streamed the debates online (vs. 20% total voters)

86% of African American voters read about the debates online (vs. 78% total voters)

Candidate Ads

Have Seen Digital Ads for Candidates



Have Taken Actions After Seeing Digital Ads for Candidates



Issue Ads

Have Seen Digital Ads for a Political Issue



Agree that Online ads for candidates or issues get my attention



■ African American Voters ■ Total Voters

Social media plays a unique role among registered voters in the election process

28% of registered voters say they generally get their info on political candidates (30% on issues) from Social Media.

Paid Registered voters see social media ads, say candidate ads influence them

25% of registered voters recall seeing an ad for a candidate (17% for an issue) on social media (vs. 61% on TV, 25% on a website)

29% registered voters say that seeing ads about a candidate can sometimes influence their opinion

Owned Registered voters follow candidates and read political articles on social media

22% of registered voters follow candidates on social media

31% of registered voters read political articles and links that friends post on social media

Earned Registered voters share political articles but also are equally likely to offend their friends by political posts

23% of registered voters often share articles on political issues on social media

24% of registered voters have 'defriended' or 'unfollowed' someone due to political posts on social media

Appendix

Political Influentials rely more heavily on digital sources for candidate and issue information than TV

Summary Table

%		Total	Conservatives	Liberals	Politically Influential	Politically Involved
Typical sources to learn about candidates <i>(Among those aware of any candidates)</i>	Digital	61	63	62	78	75
	TV	61	63	60	63	66
Typical sources to follow issues <i>(Among those interested in 1+ issue)</i>	Digital	67	63	76	81	78
	TV	69	72	67	64	68
Ad sources about candidates <i>(Among those aware of any candidates)</i>	Digital	40	46	39	61	53
	TV	61	66	56	62	64
Have taken actions based on digital candidate ads <i>(Among those who have seen digital ads of candidates)</i>		74	82	74	86	81
Most important source of candidate information	Digital	35	34	37	45	44
	TV	39	39	39	28	35
Most important source of issue information	Digital	36	38	39	53	46
	TV	39	38	39	26	35

18-34 and Hispanics are heavier digital users for candidate and issue information; AA are more reliant on TV than digital

Summary Table

%		Total	Male	Female	18-34	35-54	55+	African Americans	Hispanics
Typical sources to learn about candidates <i>(Among those aware of any candidates)</i>	Digital	61	63	58	80	63	48	58	68
	TV	61	64	59	43	59	73	63	56
Typical sources to follow issues <i>(Among those interested in 1+ issue)</i>	Digital	67	68	65	87	70	53	73	73
	TV	69	69	70	48	68	81	76	69
Ad sources about candidates <i>(Among those aware of any candidates)</i>	Digital	40	44	36	62	37	30	43	45
	TV	61	63	59	52	62	64	68	62
Have taken actions based on digital candidate ads <i>(Among those who have seen digital ads of candidates)</i>		74	79	70	79	79	65	76	87
Most important source of candidate information	Digital	35	36	34	53	37	23	36	40
	TV	39	39	40	22	38	50	43	42
Most important source of issue information	Digital	36	39	34	58	37	24	31	46
	TV	39	36	42	24	37	49	49	39

Candidate Awareness

DEMOCRATS

Hillary Clinton <small>DL</small>	90%
Bernie Sanders <small>IM</small>	70%
Martin O'Malley <small>MDL</small>	27%

INDEPENDENTS

Jill Stein <small>IMH</small>	5%
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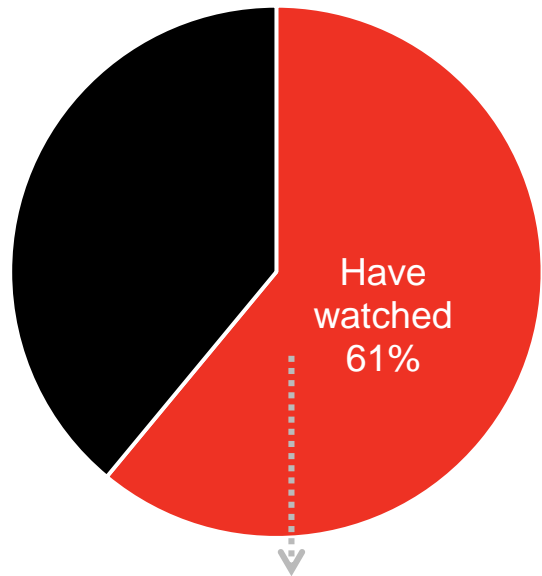
REPUBLICANS

Donald Trump <small>IR</small>	89%
Jeb Bush <small>IR 55+</small>	80%
Ben Carson <small>IMR 55+</small>	74%
Chris Christie <small>IMR 55+</small>	66%
Ted Cruz <small>IMRC 55+</small>	64%
Marco Rubio <small>IMR 55+</small>	64%
Mike Huckabee <small>IRC 55+</small>	63%
Rand Paul <small>IMR 55+</small>	61%
Carly Fiorina <small>IMR 55+</small>	54%
Rick Santorum <small>IMR 55+</small>	50%
Lindsey Graham <small>IM 55+</small>	36%
John Kasich <small>IMR 55+</small>	32%
Jim Gilmore <small>IM</small>	8%

Q2. Which of the following candidates for party presidential nominations are you familiar with? Base: Total

Over 2/3 of registered voters will likely watch a future debate.

Debate Viewership To Date
(Among Total)



52% have watched a Republican debate

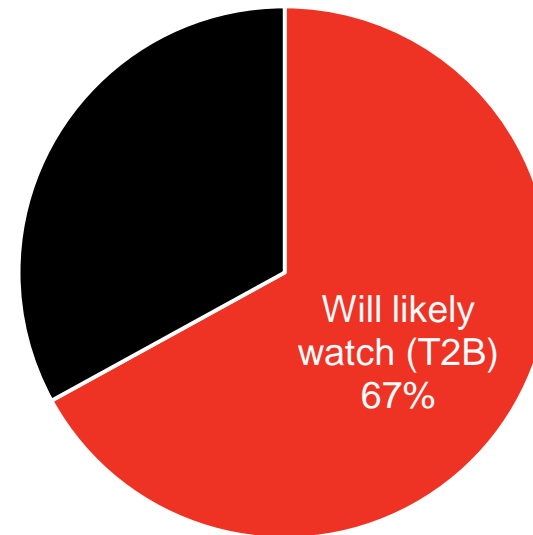
43% have watched a Democratic debate



92% watched via TV

20% streamed

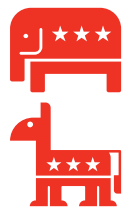
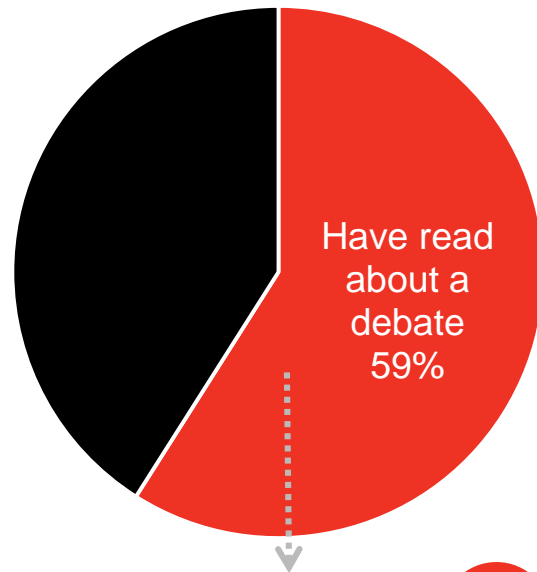
Likelihood to Watch Future Debates
(Among Total)



79% of Politically Involved will likely watch a future debate; 84% among Political Influentials.

Over 2/3 of registered voters will likely read about a future debate; almost half of registered voters have read about debates online thus far.

Reading about Debates to Date (Among Total)



52% have read about a Republican debate

47% have read about a Democratic debate

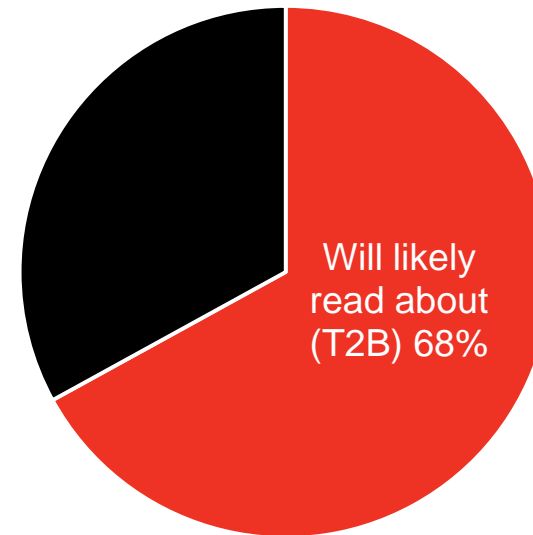


78% have read online



52% have read in newspapers

Likelihood to Read about Future Debates (Among Total)



81% of Politically Involved will likely read about a future debate; 86% among Politically Influential



VISIONCRITICAL®

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