

# Adapting To An Evolving & Fragmented Media Landscape

## 2024 Post-Election National Survey

The Center for Campaign Innovation 2024 National Post-Election Survey reveals significant shifts in media consumption patterns that continue to reshape the political campaign landscape.



## Executive Summary

The Center for Campaign Innovation's 2024 National Post-Election Survey reveals significant transformations in voter engagement patterns and media consumption habits that require evolution of campaign strategies. Digital platforms now surpass traditional media as primary information sources, with social media, streaming, and podcasts emerging as crucial channels for voter outreach in this fragmented media landscape.

Nearly universal adoption of streaming services among voters under 50, combined with majority reach among seniors, necessitates sophisticated multi-channel advertising approaches.

Relational organizing presents a powerful yet underutilized opportunity, with over 75% of voters discussing elections within their personal networks and nearly one-third engaging with digital influencers. This trend, coupled with the 37% of voters who share political content online, indicates significant potential for message amplification through trusted channels.

While digital engagement continues to grow, most campaigns still need to reach voters through mass media intermediaries as just a quarter of voters opt-in to receive direct communication from candidates and campaigns. The integration of linear TV and streaming advertising achieves 95% voter reach, demonstrating the effectiveness of combined traditional and digital strategies.

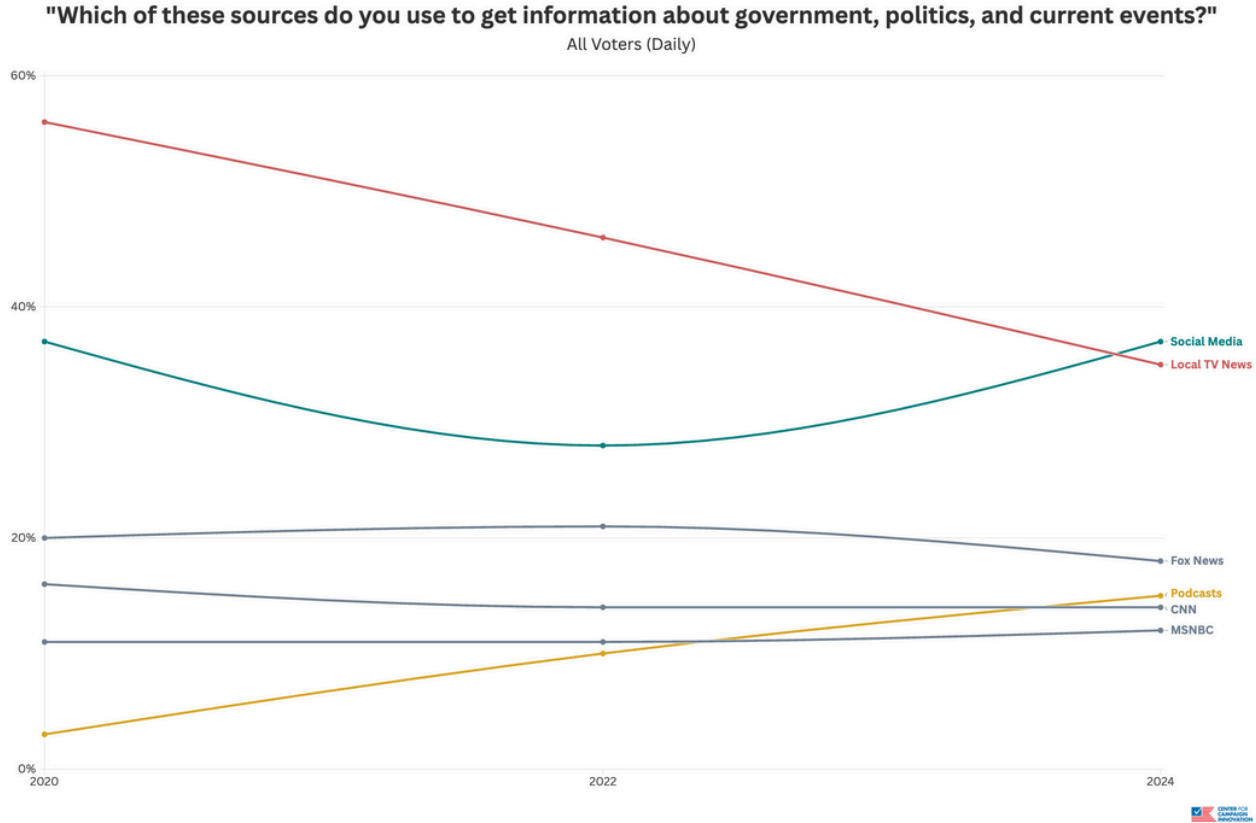
Success in this fragmented landscape requires campaigns to implement comprehensive strategies that leverage emerging technologies, formalize relational organizing, and maintain presence across diverse media channels.

# 1. Key Findings

The Center for Campaign Innovation 2024 National Post-Election Survey reveals significant shifts in media consumption patterns that continue to reshape the political campaign landscape.

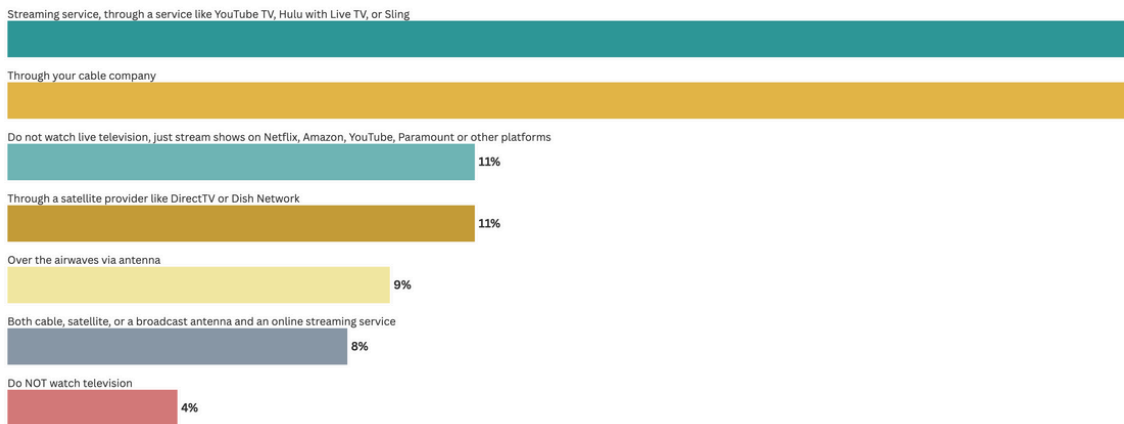
## 1.1 Fragmented Media Landscape

Digital platforms now dominate daily news consumption, with social media overtaking local TV as voters' primary information source, particularly among younger demographics. Podcasts have emerged as a major platform, achieving parity with cable news channels in terms of voter reach.



**"Which best describes how you get your live TV service, like news and sports?"**

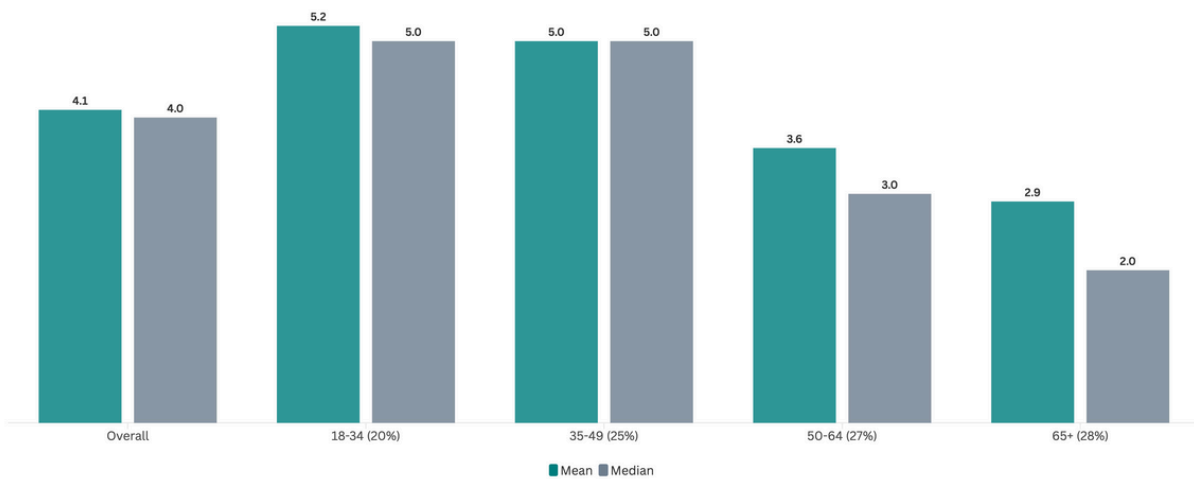
All Voters



The rise of streaming services marks another substantial shift in live media consumption for news and sports, where voters are less likely to be able to skip ads. With fewer than half of voters exclusively watching live linear TV, streaming platforms have become essential for campaign messaging. The widespread adoption of streaming services spans demographics – nearly all voters under 50 and most seniors access at least one platform that accepts political advertising.

This fragmentation creates new complexities for campaign strategy. Voters typically engage with 4-5 different streaming services, compelling campaigns to expand beyond established platforms like Hulu and YouTube. While linear TV remains valuable for reaching older demographics, effective voter outreach now demands an integrated approach across traditional, digital, and streaming channels.

**Number of Streaming Services**



Success in this evolving landscape requires campaigns to craft targeted media strategies that reflect demographic variations in media consumption across age groups, geographic regions, and party affiliations. Since live linear TV reaches less than half of voters, this means campaigns need to move beyond measuring their ad reach in terms of traditional TV gross ratings points (GRPs), and move into more impression based metrics, that reflect how voters are consuming media across different platforms. Understanding these nuanced patterns enables campaigns to optimize their messaging channels for maximum impact.

## 1.2 Relational Organizing and Trust

**75%**

Voters who reported speaking with a friend, coworker, or neighbor about politics.

**Relational organizing represents a powerful but underutilized strategy in modern campaigns.**

**The prevalence of election-related discussions among family and friends, reported by over 75% of voters, indicates significant potential for campaigns to formalize and scale these natural patterns of political engagement.**

Digital platforms provide additional avenues for message amplification, with 37% of voters actively sharing candidate-related content despite the polarized political environment and platforms like Facebook, Instagram and TikTok de-prioritizing political content in their algorithms' and users' feeds. This presents campaigns with opportunities to leverage both personal networks and digital channels to foster authentic engagement.

The influence of trusted messengers extends beyond immediate social circles. The engagement of nearly one-third of voters with online content creators and influencers demonstrates the expanding scope of relational organizing, particularly among younger demographics who form meaningful connections with these digital personalities. These trusted voices offer campaigns effective channels for reaching traditionally disengaged audiences.

Relational organizing serves as a strategic multiplier within the fragmented media landscape. By encouraging voters to engage their networks, campaigns can effectively expand their reach, build trust, and deliver messages in a more personal and impactful manner.

## 1.3 Evolving Voter Engagement

**Digital platforms have fundamentally transformed how voters interact with campaigns and process political information. Voter engagement has shifted from traditional methods toward more personalized and interactive experiences. For example, 64% of voters reported watching videos of or about candidates online, reflecting the growing importance of digital video content in shaping voter opinions.**

Social media platforms enable direct engagement between voters and candidates, with 37% sharing or re-sharing content online about a candidate and 30% of voters interacting with a candidate's social media presence by liking a page or post or making a comment. This behavioral shift requires campaigns to emphasize responsive communication channels that meet current voter expectations.

The integration of artificial intelligence into voter information-seeking behavior marks an emerging trend, with 15% using a voice-controlled assistant and 11% of voters utilizing tools like ChatGPT or Google Gemini to research candidates and elections. Campaigns should actively incorporate innovative technologies to provide accessible and engaging information for voters.

Despite these advancements, the survey reveals that only 28% of voters have opted into direct campaign communication via email or text. Campaigns must capitalize on this opportunity by developing compelling and targeted digital outreach strategies to engage voters effectively. Candidates may want to copy the cadence of social media personalities by encouraging their supporters to like and share their content with their own network to have greater reach.

Success in modern campaigns requires sophisticated digital engagement approaches that align with evolving voter preferences. By embracing these shifts, campaigns can connect with voters more effectively, fostering greater participation and informed decision-making.

## 1.4 Campaign Ad Effectiveness

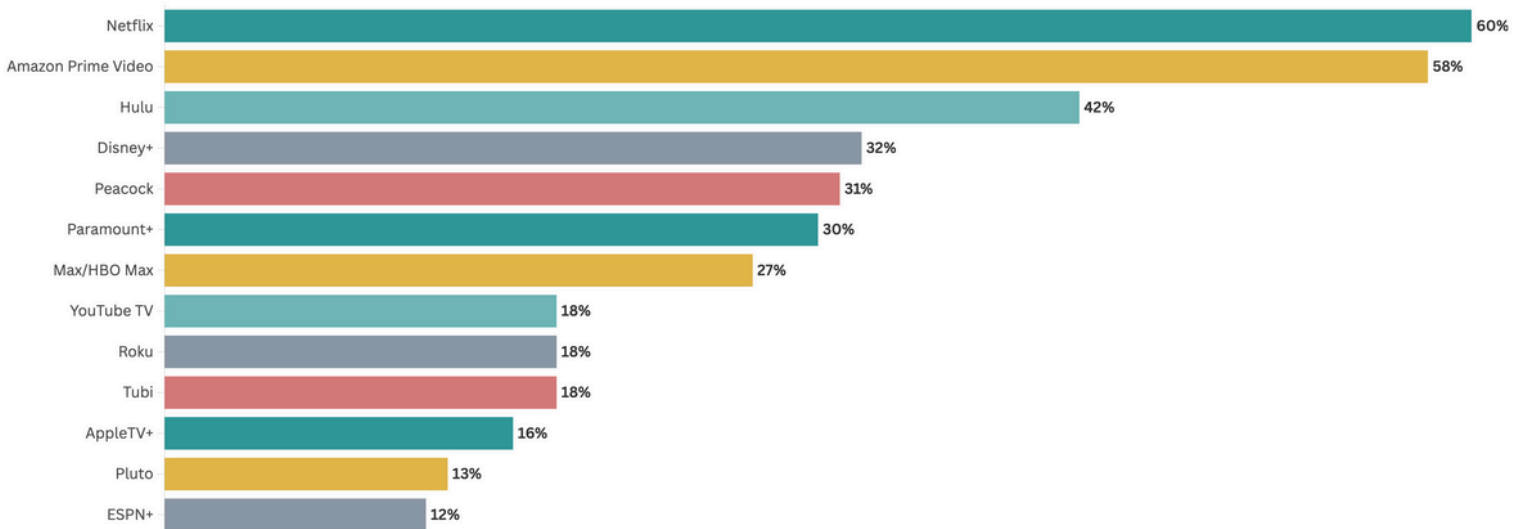
The survey highlights the importance of integrating linear TV and streaming ads to achieve maximum voter outreach. The data reveals that combined, these two mediums allowed campaigns to reach over 95% of voters. This combined strategy was particularly effective in bridging generational and technological divides, ensuring that both older voters, who predominantly consume linear TV, and younger, streaming-focused voters received campaign messages.

Streaming platforms provide essential access to younger demographics who consume content exclusively through these channels and remain inaccessible through linear TV alone. These platforms also enable precise audience segmentation for targeting specific voter groups. Republican campaigns demonstrated particular success in using digital advertising to activate low-propensity voters.

In order to maximize the impact of paid media, campaigns must develop advertising strategies that combine linear TV's broad reach with the targeted precision of streaming platforms. By tailoring content to specific demographics and integrating these efforts with relational organizing initiatives, campaigns can enhance their effectiveness and secure broader voter engagement.

### "Which streaming services do you use?"

All Voters



## 2. Challenges & Opportunities

**The Center for Campaign Innovation’s 2024 National Post-Election Survey reveals critical challenges and opportunities for campaigns navigating the current political landscape.**

The fragmented media ecosystem remains one of the most significant obstacles, requiring campaigns to invest in diverse platforms to achieve comprehensive voter reach. Reliance on linear TV alone is no longer sufficient, particularly as younger voters continue to shift toward digital-first and streaming-based media consumption.

One of the most pressing challenges for campaigners is reaching low-propensity voters. This group often relies on alternative information sources like social media and podcasts but remains skeptical of traditional political outreach methods. Effective engagement requires an integrated strategy combining relational organizing with precision-targeted digital advertising.

Rural outreach also presents unique obstacles for campaigners. Geographic dispersion limits the feasibility of door-to-door canvassing in less densely populated areas, which has traditionally been an effective tactic. Just 19% of rural voters report having a campaign knock on their door, compared to 29% of suburban voters and 34% of urban voters. Digital tools and relational organizing offer viable alternatives for maintaining consistent voter contact in these regions.

The adoption of artificial intelligence platforms similarly creates new possibilities for voter engagement. These technologies enable campaigns to develop sophisticated, personalized communication strategies that resonate across diverse voter segments.

Additionally, relational organizing presents a largely untapped opportunity for campaigns to leverage trusted networks of friends, family, and influencers to amplify their messages. By formalizing and scaling these efforts, campaigns can extend their reach and foster genuine voter engagement.

Success in this evolving landscape requires campaigns to develop comprehensive strategies that integrate traditional advertising and outreach, digital innovation, and relational organizing. This approach will enable campaigns to build meaningful connections across an increasingly diverse and fragmented electorate.

## 3. Recommendations

**Based on the survey findings, campaigns should prioritize the following strategic actions to ensure more effective voter engagement.**

### **Invest in Multi-Channel Outreach**

Campaigns must allocate resources across both traditional and digital media channels. By combining linear TV's broad reach with the precision of streaming platforms, campaigns can ensure their messages resonate with diverse voter segments. Particular attention should be paid to younger voter and lower propensity voters who primarily consume content through digital-first platforms.

### **Leverage Relational Organizing at Scale**

Campaigns should formalize relational organizing efforts by providing supporters with the tools and messaging to engage their personal networks. By amplifying peer-to-peer outreach, campaigns can build trust and expand their influence organically.

### **Adopt Emerging Technologies**

Campaigns must embrace tools like artificial intelligence to create personalized voter experiences. From AI-driven voter segmentation to interactive communication tools like voice-powered search and ChatGPT, these technologies offer significant potential to enhance outreach and engagement.

## **Address Geographic and Demographic Challenges**

Campaigns need to develop strategies that account for the unique challenges of rural and low-propensity voters. Digital-first strategies, combined with hyper-localized messaging, can help overcome these barriers effectively.

## **Enhance Digital Communication**

With only around one-quarter of voters opting into direct communication, campaigns must both improve permission-based email and text outreach strategies, as well as reach voters who do not opt-in to campaign communication where they are on social media and digital channels like podcasts. Personalized, engaging, and relevant content will be key to driving higher engagement rates. Candidates may want to copy the cadence of social media personalities by encouraging their supporters to like and share their content with their own network to have greater reach.

## **Expand Streaming Ad Strategies**

Campaigns should diversify their streaming ad placements beyond popular platforms like Hulu to include lesser-utilized services that still cater to key demographics. Leveraging analytics to refine targeting will further improve ad efficiency.

## 4. Conclusion

The Center for Campaign Innovation's 2024 National Post-Election Survey reveals fundamental shifts in voter engagement patterns that require urgent evolution in campaign strategies. The convergence of digital platforms with traditional media necessitates sophisticated approaches that integrate relational organizing, precision advertising, and personalized communication to achieve maximum impact.

Emerging technologies, particularly AI tools, offer unprecedented opportunities for campaigns to connect with voters in more meaningful ways. These tools enable the delivery of customized content that aligns with individual preferences, enhancing both engagement and participation rates across demographic segments.

Campaigns must adopt a voter-centric perspective, focusing on meeting voters where they already consume information and engage in discussions. From streaming services to social media platforms, effective campaigns will prioritize platforms that reflect voter preferences, ensuring their messages are heard by the right audiences at the right time.

The transformation of voter behavior demands that campaigns develop comprehensive strategies incorporating both technological innovation and proven engagement methods. This integrated approach enables campaigns to build enduring connections with an increasingly diverse electorate while navigating the complexities of the modern political landscape.

## Methodology

The Center for Campaign Innovation commissioned David Kanevsky with 3D Strategic Research to conduct a post-election survey with voters and donors.

The survey was conducted November 3-7, 2024 among n=1,500 voters nationally, along with an oversample of N=300 donors, for a total of N=524 donors. The voter survey has a margin of error of +2.52%, while the combined donor oversample has a margin of error of +4.28%.

The voter survey was conducted with a mix of text messages inviting voters to take the survey via a secure web link and an online survey with voters on the Dynata panel who are matched to the Data Trust voter file. The donor oversample was conducted using a flag of those who had contributed to a candidate or party, with invites to take the donor survey via a secure web link were sent via text message and e-mail. The survey was weighted to reflect the 2024 electorate based on region/geography, gender, age, education, race and results for President and U.S. Congress.