



# 2020 Post-Election National Campaign Technology Survey



# Introduction

---

**The Center for Campaign Innovation**, a 501(c)(4) nonprofit research organization guiding conservatives through the digital transformation of politics, conducted a first of its kind nationwide post-election survey studying voters' usage of technology and interaction with campaigns.

The online survey was conducted from November 1-5, 2020 among 1,200 voters nationally. The margin of error for the survey is  $\pm 2.8\%$ . Respondents were matched to the Data Trust voter file, with the data weighted to match the election results. In addition to the survey of voters, there was an oversample of donors to political campaigns and organizations. A total of 541 donors were interviewed. The margin of error for this survey is  $\pm 4.2\%$ .

The survey is the only nationwide poll dedicated exclusively to understanding voters' digital media consumption, technology usage, and online interactions with political candidates. It was made possible by a grant from the American Action Network and was conducted by David Kanevsky of 3D Strategic Research.

This report covers five key highlights from the research and some additional individual findings. The survey topline results are available at [CAMPAIGNINNOVATION.ORG](https://CAMPAIGNINNOVATION.ORG).

The data tells the story of an American political landscape transformed by technology, both in terms of how voters consume information and make political decisions as well as how candidates and their campaigns reach, persuade, and mobilize voters.

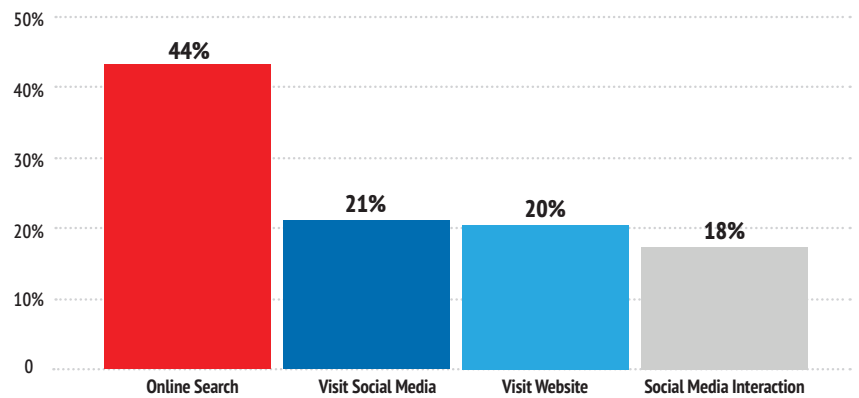
# Digital Campaign IS Campaigning

**This survey** removes any doubt about the importance of digital campaigning to reach significant, crucial portions of the electorate through social media, online platforms, and new technology. Many voters are getting their news about politics and government primarily through digital means. Additionally, majorities of key electoral segments, including persuadable voters, go online to research their choices before an election.

**FIGURE 1**

52% of all voters surveyed reported actively seeking out information online about the election and candidates running for office, including using search engines like Google, visiting a candidate’s social media, visiting a campaign’s official website, or interacting with a candidate on social media.

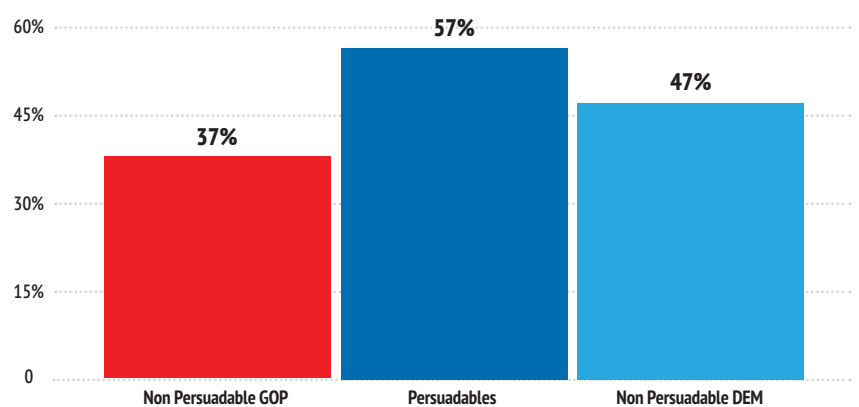
**52% of Voters Actively Sought Out Political Information Online**



**FIGURE 2**

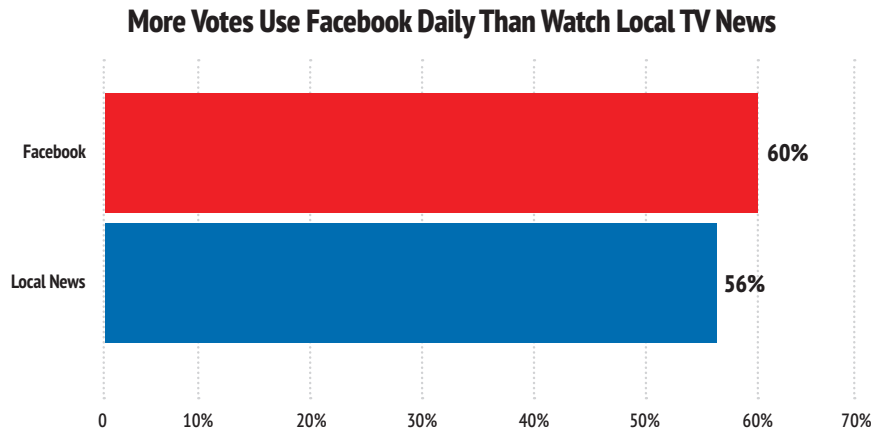
Persuadable voters were more likely to seek out political information using an online search engine like Google or Bing than voters who reported never considering voting for the opposing party’s candidate for Congress. 57% of persuadable voters used search engines to get information about elections and candidates, compared to 47% of committed Democrats and only 37% of committed Republicans.

**Persuadable Voters More Likely to Search Online**



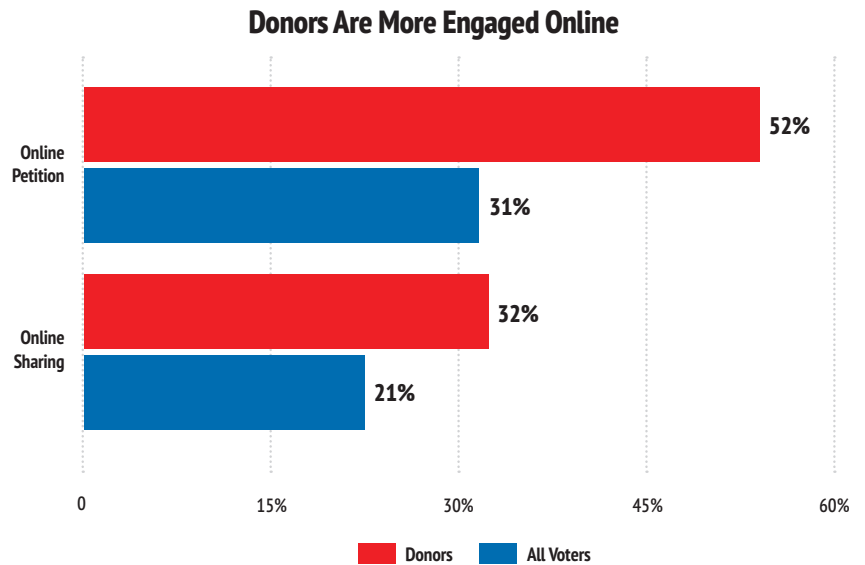
**FIGURE 3**

Campaigners can reach more voters daily on Facebook than via local TV news. Three out of five (60%) voters reported using the social media platform daily, compared to 56% who say they watch local TV news every day.



**FIGURE 4**

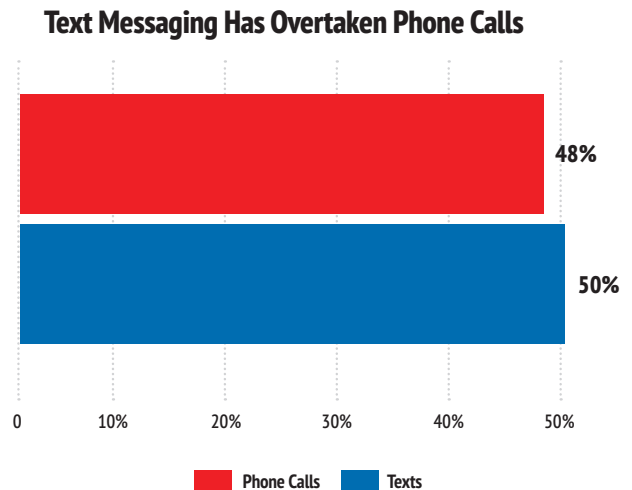
Donors are far more engaged online than average voters, despite donors skewing older than the typical voter. A majority of donors (52%) reported signing an online petition in the last two years and one in three (32%) shared content online through social media.



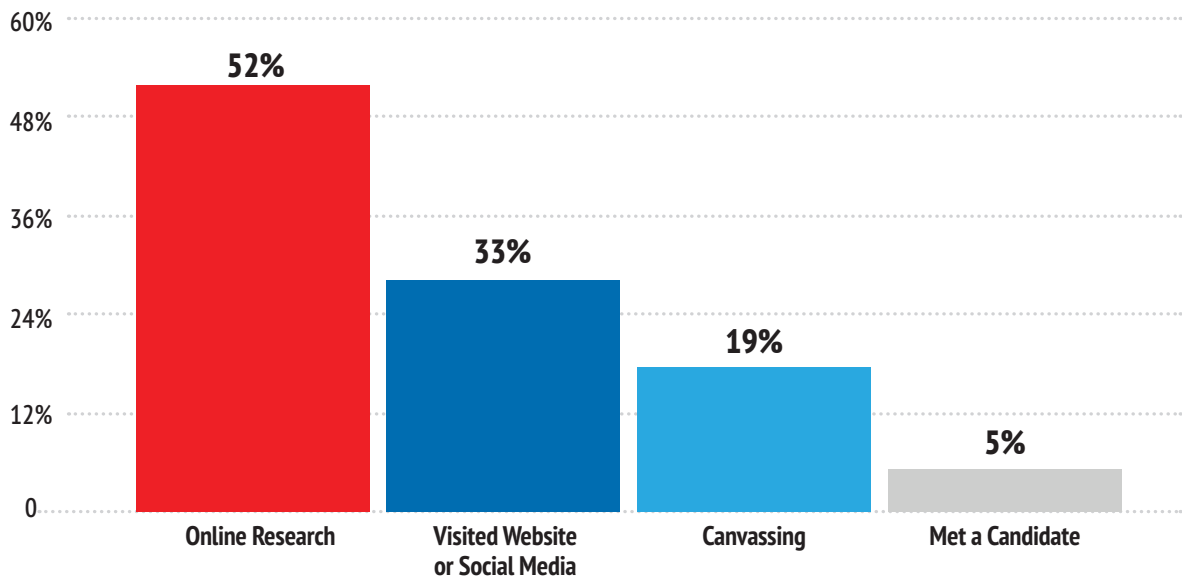
# The Digital Transformation of Politics Has Happened

**FIGURE 5**

During the 2020 election cycle, more voters reported receiving text messages than phone calls from political campaigns. Phone banking has been a staple of political campaigning since the 1960s, but text messaging has now overtaken the tactic in terms of reach and scale. This growth is largely due to the advent of peer to peer (P2P) text messaging which enables campaigners to text voters at scale and was pioneered by Bernie Sanders’ campaign in 2016.



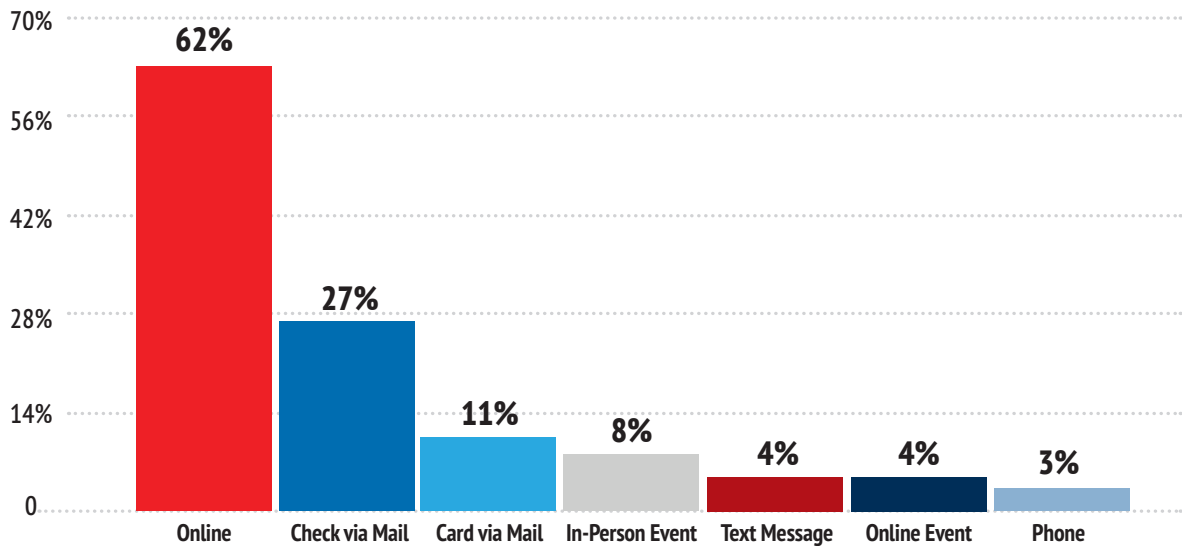
### Digital Outreach Gives Campaigns More Scale



**FIGURE 6**

Candidates reach more voters with digital campaigning than traditional analog methods like canvassing and in-person events. A majority of voters (52%) reported actively seeking out information about elections and candidates online, including a third (33%) who either visited a candidate’s website or social media. Only 5% of voters reported meeting a candidate in person. Even accounting for social distancing measures, just 5% of voters participated in a Zoom or live video with a candidate.

### Donating to Campaigns Happens Online



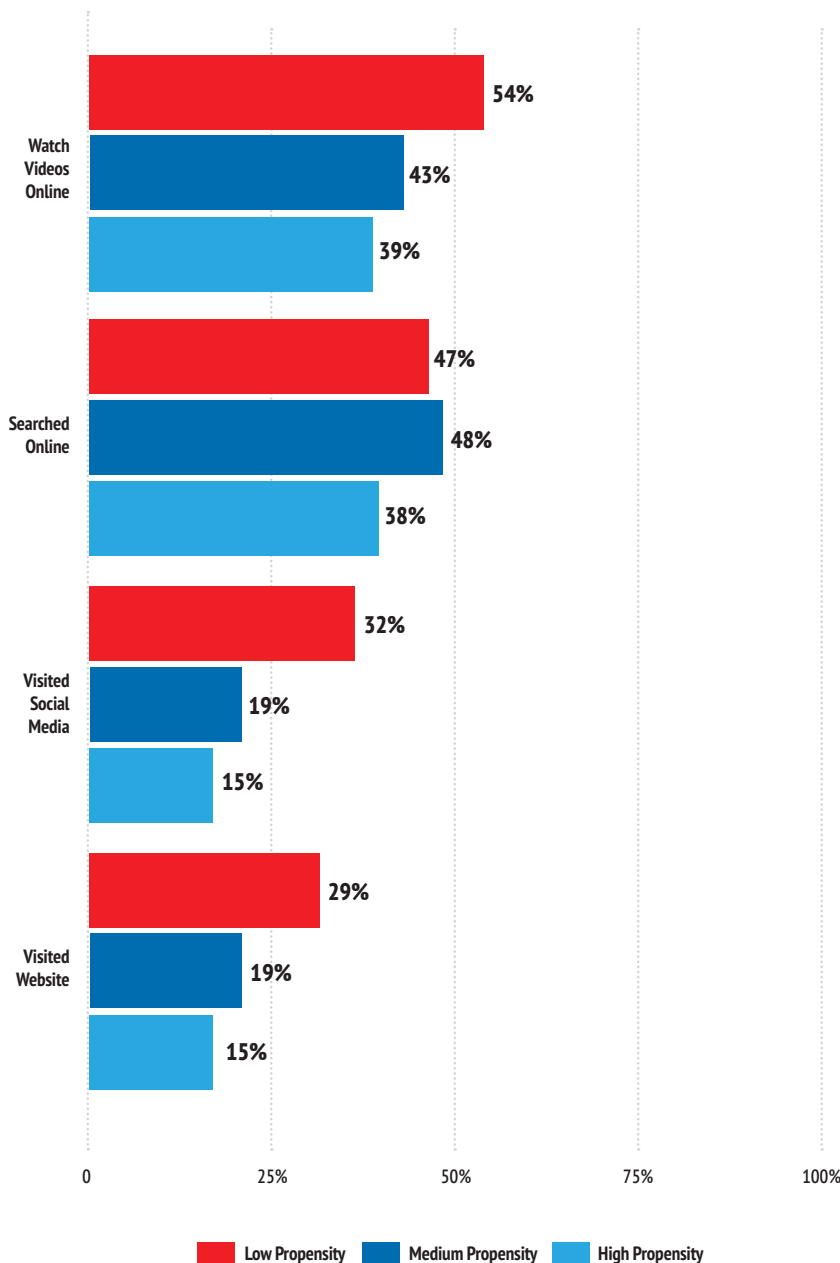
**FIGURE 7**

Donating to campaigns is no longer reserved to direct mail and in-person fundraisers but primarily happens online. 62% of donors surveyed reported giving online.

# There's Untapped Potential in Digital Campaigning

Despite the growth in digital campaigning, significant opportunities remain for campaigns to increase their outreach online.

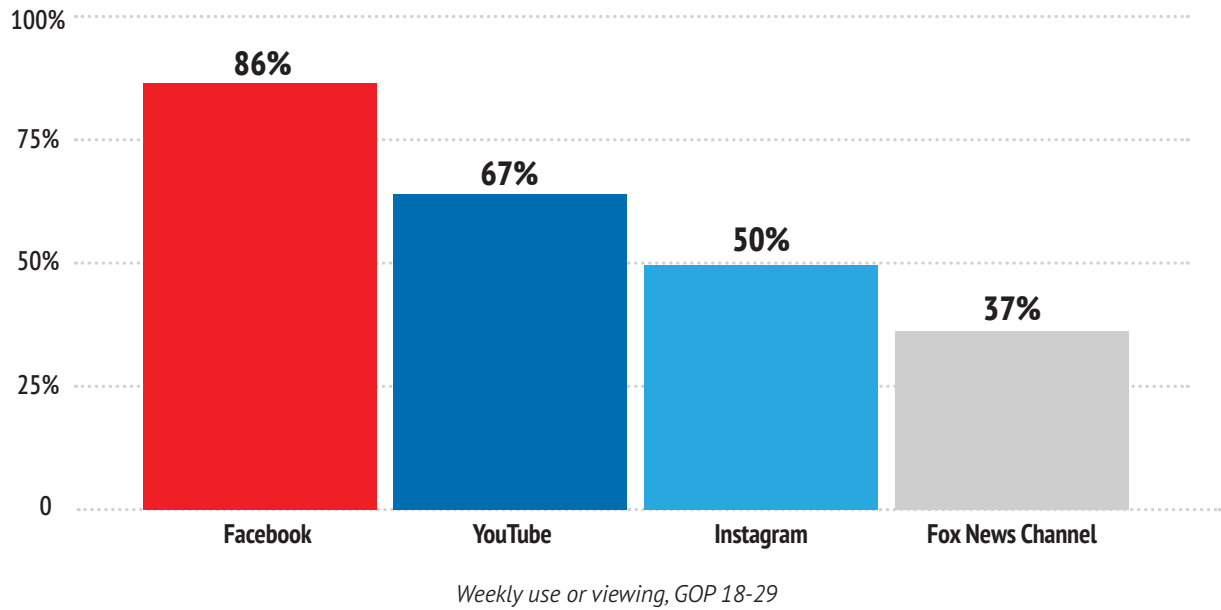
**Low Propensity Voters Are More Likely to Engage Campaigns Online**



**FIGURE 8**

So-called low propensity voters, who only voted in one or fewer of the last four general elections, are more likely to get their information about campaigns and elections from online sources. While most campaigns use digital to engage with activists, it is important to recognize that low propensity voters are turning to digital to learn about candidates before casting their vote, especially further down the ballot where candidates may be less known.

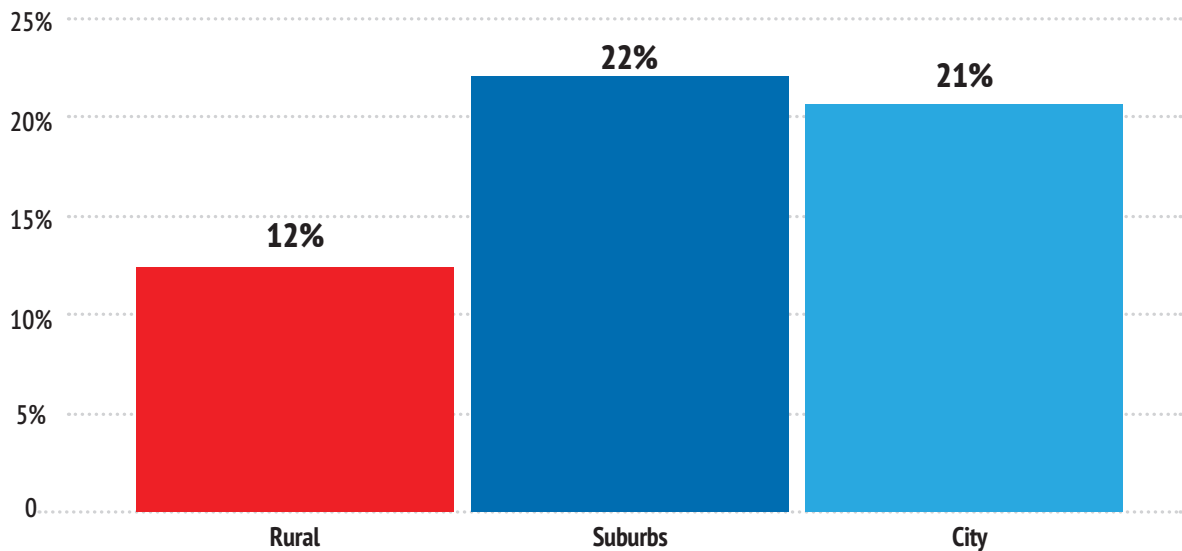
### For Young GOP, Social Media > Fox News



**FIGURE 9**

Fox News, the leading cable news channel by ratings, remains an important media outlet for Republican voters, but for younger Republicans aged 18-49, Facebook, YouTube, and Instagram are more prevalent.

### Digital Can Fill the Gap Left With Rural Outreach



**FIGURE 10**

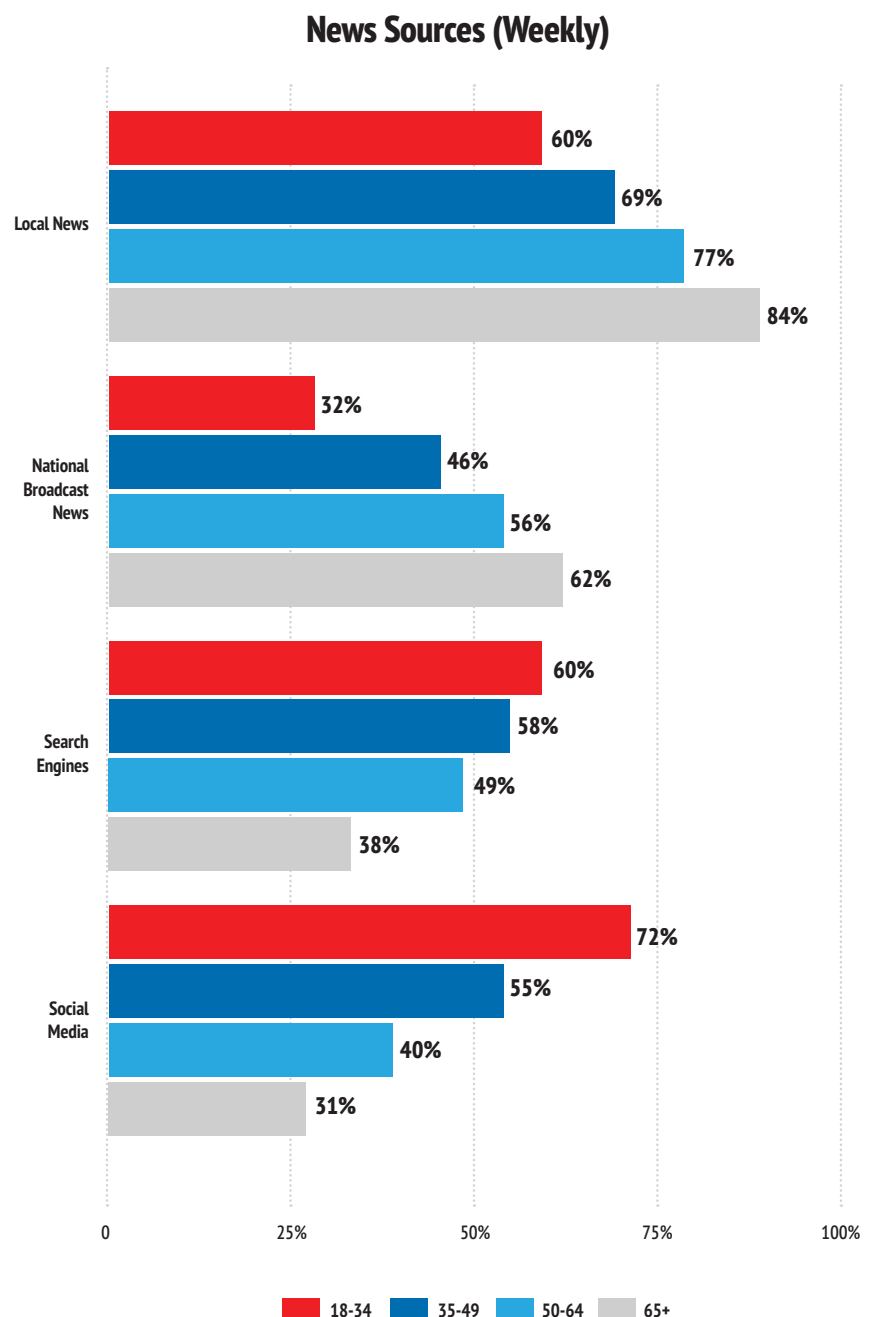
Demographically, our survey found that most campaign contact methods, including TV, texting, and online channels, had similar reach across the rural-urban divide. We did identify a significant gap in canvassing of rural voters. As Republican candidates are increasingly relying on margins in rural areas, digital can help fill the voter contact to reach rural voters where in-person canvassing is inefficient or not possible.

# Generational Differences Not Accounted for in Campaign Contact

**Unsurprisingly**, our survey found significant generational differences amongst voters with regards to their media consumption, technology adoption, social media usage, and political decision-making process.

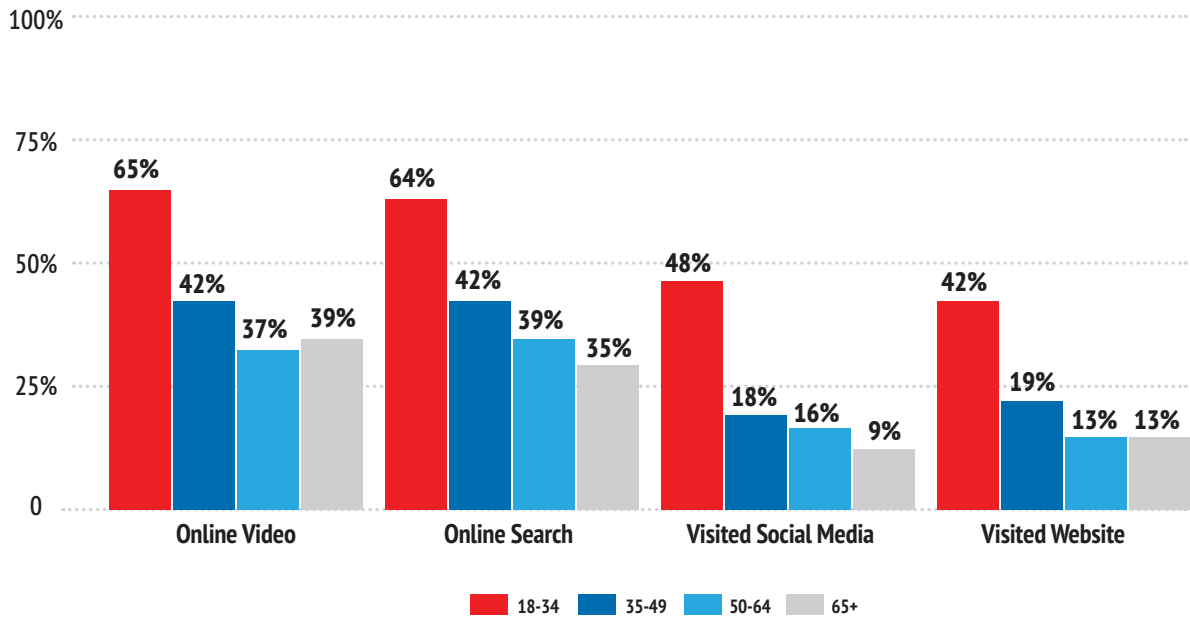
**FIGURE 11**

When asked about news sources to get information about government, politics, and current events, older voters aged 65 and older were more likely to rely on local TV news (84%) and national broadcast TV news (62%) than the average voter on a weekly basis. Conversely, younger voters aged 18-34 favored social media (72%) and search engines like Google (60%).





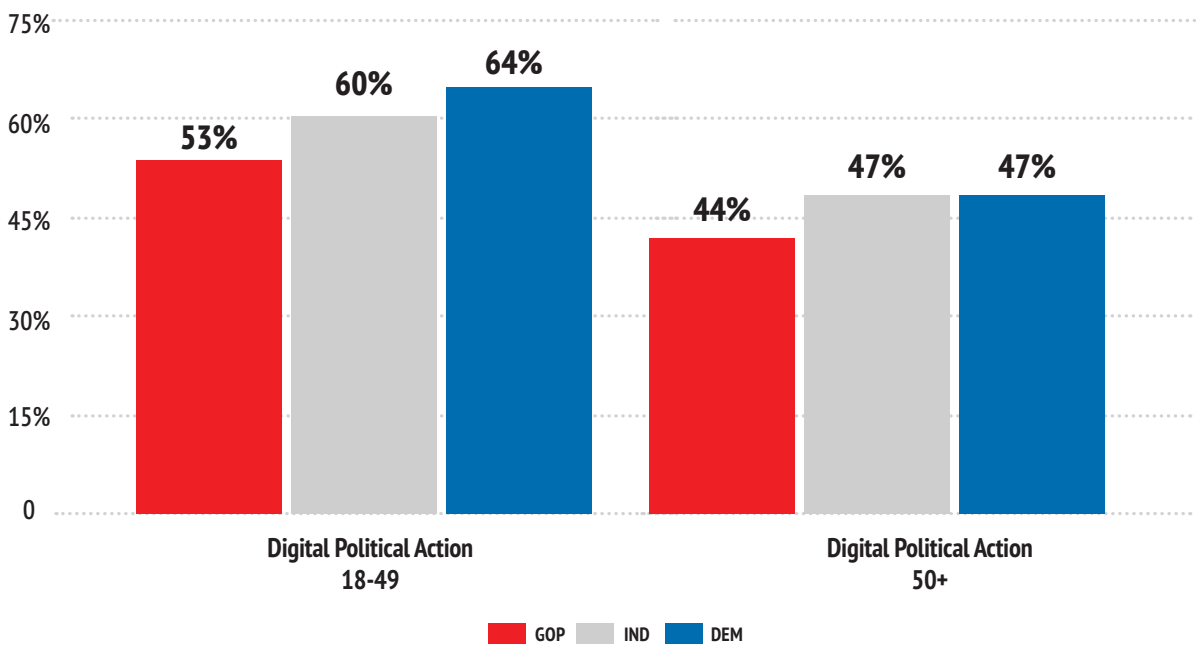
### Candidate Research



**FIGURE 12**

These generational differences persist when it comes to how voters learn about elections and candidates. Younger voters (18-34) were more likely to watch videos of or about the candidates online (65%), search online for additional information about the candidate or election (64%), go to a candidate’s social media accounts (48%), and visit a campaign’s website (42%) than voters overall.

### Young GOP Under-engaged Online



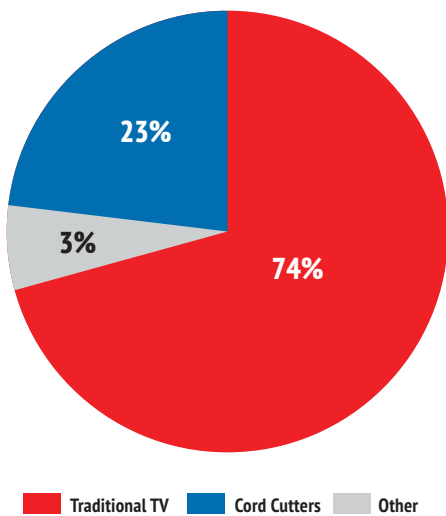
**FIGURE 13**

There is a notable gap in digital political engagement amongst young Republican voters. Republicans voters aged 18-49 are less likely to take digital political actions like visiting a candidate’s website or social media accounts than their independent or Democrat peers.

# Voters' Attention Share is Diffuse

Voters have more options than ever before when it comes to deciding how they'll allocate attention. This makes it increasingly difficult to reach voters with paid media.

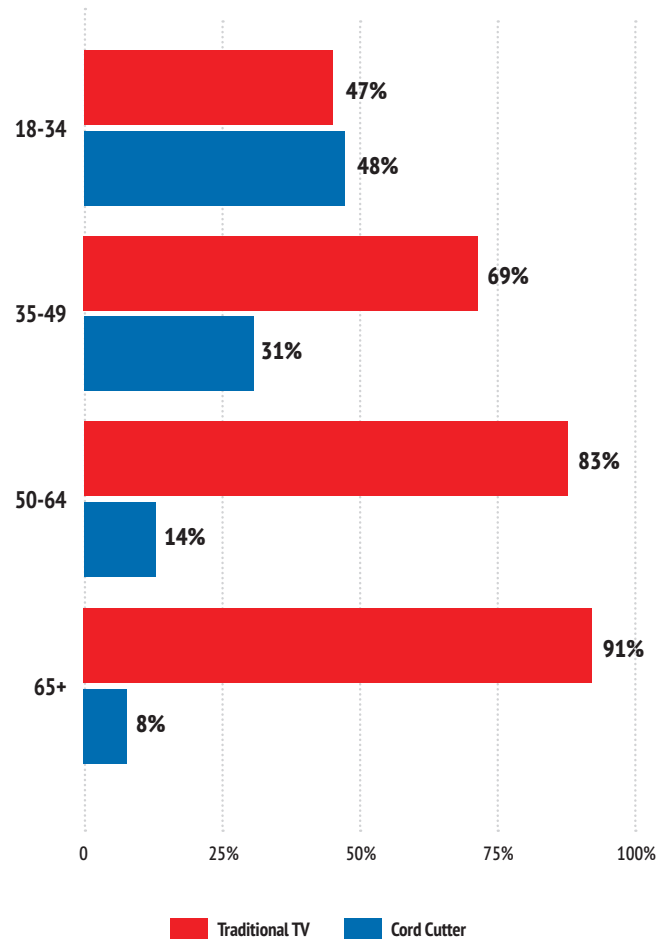
**The Cord Cutting Challenge Is Real**



**FIGURE 14**

One in four voters (23%) are “cord cutters” who do not watch traditional TV, instead using streaming services or not watching live TV at all. Cord cutters are younger, with half (48%) of voters aged 18-34 and one in three (31%) voters aged 35-49 comprising this category.

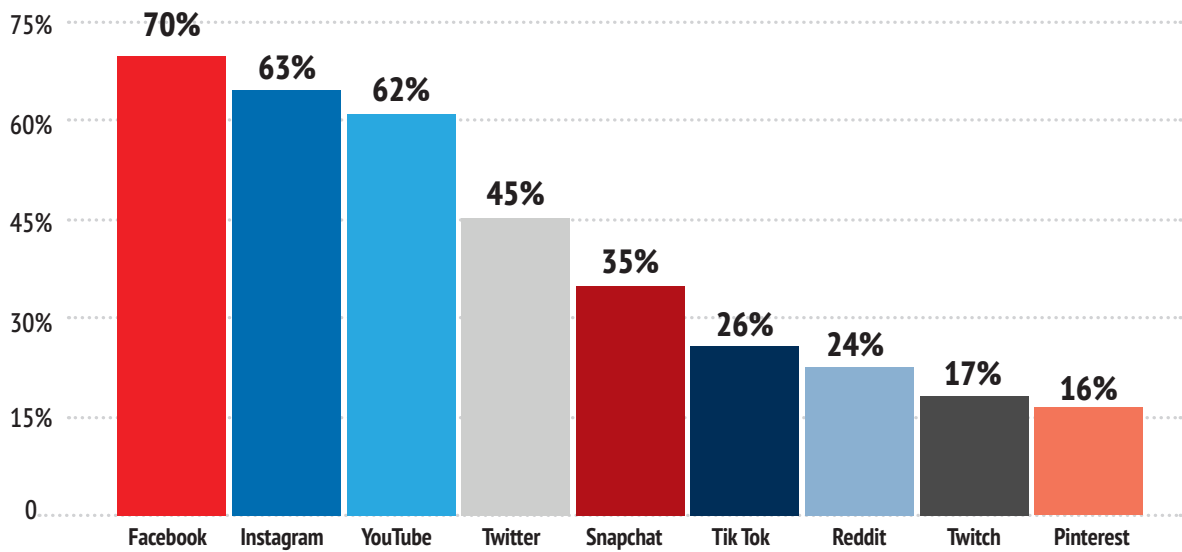
**Younger Voters Are Increasingly Cord Cutters**



**FIGURE 15**

For campaigns that spend a significant portion of budgets on TV advertising, missing a quarter of the electorate who do not regularly watch live TV presents a major challenge. The media consumption choices available to voters are vast and varied.

### Daily Social Media Usage (Voters 18 - 34)



**FIGURE 16**

Among young voters aged 18-34, there are nine social media platforms seeing daily usage in the double digits. In 2020, all of these platforms placed restrictions on political advertising, including total prohibition by some. As of this writing (January 2021), Facebook and Google continue to “pause” all political advertising.

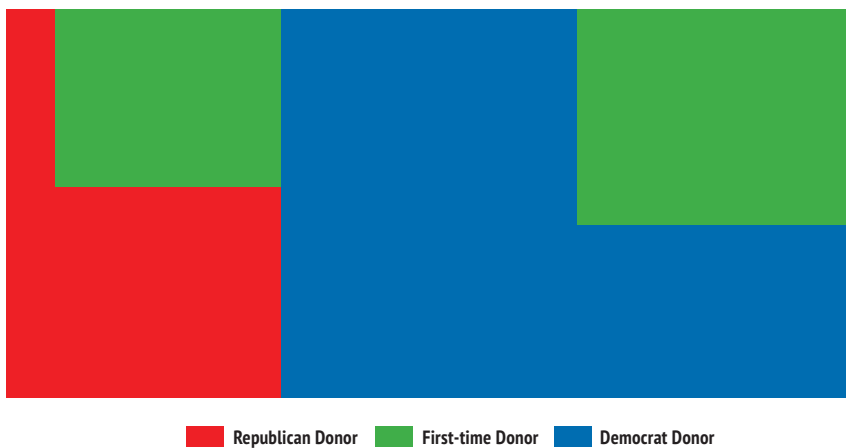
## Other Important Findings

**Our survey** uncovered a handful of additional findings worth mentioning here.

A third (33%) of donors gave to political campaigns and organizations for the first time during the 2020 cycle.

During the presidential primary for the Democrats, grassroots donations was an initial requirement for participation in debates. Among Republicans, the introduction of WinRed and the Trump campaign’s emphasis on online fundraising offer possible explanations for the increase in first-time donations. Notably, the first-time donors were also spread evenly across age groups with younger (34%), middle-aged (32%), and older (33%) donors giving for the first time at roughly the same rates.

### Donors Gave to Democrats 2 to 1

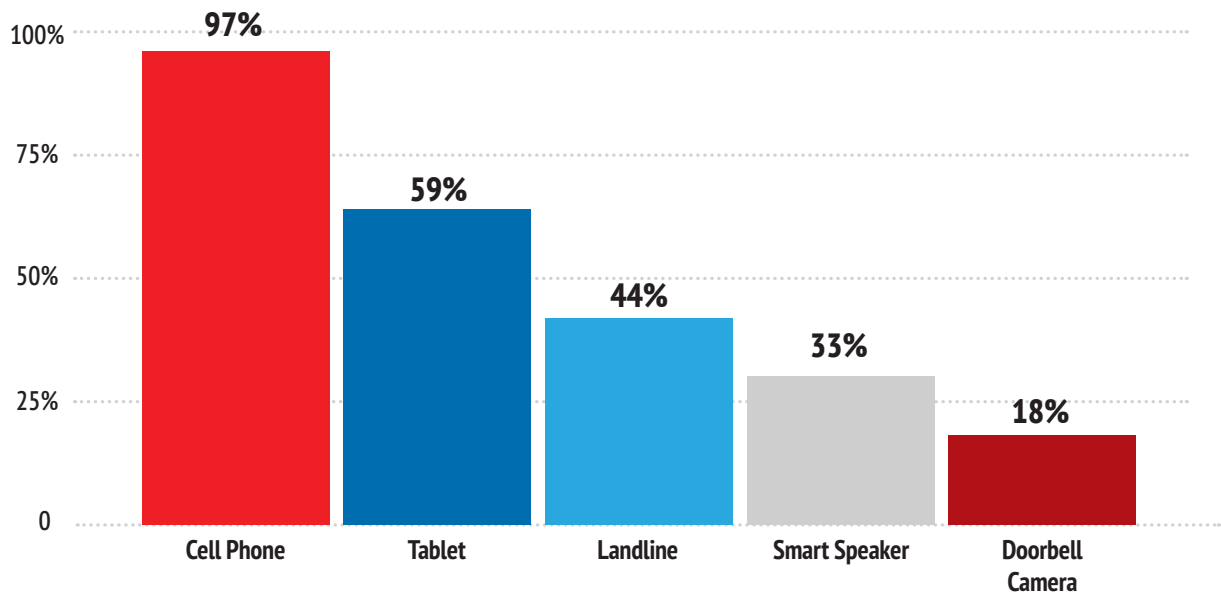


**FIGURE 18**

Overall political donors gave to Democrats by a two to one margin. A third (33%) of donors gave to political campaigns and organizations for the first time during the 2020 cycle. While Republicans saw a higher rate of first time donors (38%) than Democrats (30%), for each new GOP donor there were 1.5 new Democrat donors.

61% of voters surveyed opposed the use of web activity to personalize online advertising. This reflects Google’s policies on political advertising which limits advertisers’ ability to target beyond basic demographic details. Facebook, however, allowed campaigns to more narrowly target ads based on voter registration data and web activity.

### Voters & Consumer Tech



**FIGURE 19**

When it comes to consumer technology, 97% of voters have cell phones, compared to just 44% with landline telephones. The near total penetration of cell phones and ongoing decline of landline telephones presents significant challenges for voter contact and polling.

A third (33%) of voters have smart speakers, like an Amazon Echo or Google Home, and one in five (18%) have a doorbell camera, such as a Nest or Ring. These emerging technologies provide campaigners new channels for reaching voters. For example, a candidate could launch speaker-based apps to have autonomous, interactive conversations with voters. Similarly, with canvassing, doorbells offer the chance to speak with voters even if they aren’t physically at their homes.

# Conclusion

---

**As our survey shows,** the digital transformation of politics is well underway. Technology has changed how voters consume information and make political decisions. It has upended how candidates, their campaigns, and allies reach, persuade, and mobilize voters.

For campaigners, there remain significant, untapped opportunities with the use of digital marketing and technology, but the pace of change is accelerating. Cutting-edge innovations including artificial intelligence (AI), machine learning (ML), and natural language processing (NLP) are already being deployed in politics.

While maintaining competitive advantages is often the primary motivator for partisans to pursue innovation and implement new technology, it ultimately makes our political process more engaged with and responsive to voters. We encourage candidates and their allies to embrace the opportunities highlighted in this data to further strengthen the effectiveness of our democratic system.

## About the Center for Campaign Innovation

The Center for Campaign Innovation is a 501(c)4 non-profit research and training center guiding conservatives through the digital transformation of politics. We welcome technologists and entrepreneurs into our movement, foster a community of innovation, and educate practitioners.

Our motto is to learn, test, and optimize. We put this into practice through publishing, training, events, and research.

The Center serves as a technology research and development hub committed to long-term thinking. Through case studies, white papers, surveys, and other research, we accelerate innovation throughout the ecosystem.

Visit [CAMPAIGNINNOVATION.ORG](https://CAMPAIGNINNOVATION.ORG) to learn more and get involved.

