

Voter Spotlight

Uncovering behaviors & understanding attitudes of United States voters in the 2020 election season.



Introduction

With the 2020 presidential election season underway, DISQO sought to shine a spotlight on voter attitudes and behaviors. In this report, DISQO shares the results of two distinct studies: a behavioral analysis of how political affiliation affects media consumption and an exploration into voter sentiment, excitement, and motivations.

With a unique combination of profiling, digital behavioral data, and attitudinal responses, the goal was twofold. First, we sought to quantify to what degree political affiliation impacts the way we consume digital news sources and sites. Second, we sought to understand voter interests and motivators for the 2020 election cycle.

Do we only seek out sites and click on headlines that we believe will fit our desired narrative? Do we only spend time on sites that will tend to reflect and reinforce our own opinions? Similarly, how engaged are we in the political process, how well do we understand it, and what motivates us to go to the ballot box?



Table of Contents

Methodology 4

Key Findings.....5

Voter Behaviors in 20206

 Mainstream News Consumption7

 Editorial News Consumption 8

 Business News Consumption.....9

 Entertainment News Consumption10

 Social Media Time Spent..... 11

 Professional Sports League Time Spent12

 Sports News Consumption13

 Music Streaming Time Spent.....14

 Online Department Store Browsing.....15

 Ecommerce Browsing16

 Health & Fitness Browsing17

Voter Sentiment in 202018

 Planned Participation in 2020 State Primary or Caucus19

 Previous Participation in 2016 State Primary or Caucus..... 20

 Planned Participation in Primary or Caucus by Process21

 Planned Participation in Primary or Caucus by State 22

 Understanding of the Primary & Caucus Process 23

 Attention Paid to the 2020 Presidential Race 24

 Plans to Vote in November 25

 Why People Vote..... 26

About DISQO..... 27

Methodology

The Audience

All participants in this study are opted-in members of the DISQO Audience. Digital activity for the behavioral component of this study was captured via a 100% opt-in first-party data set. Attitudinal responses for the survey component of the study was likewise collected directly from DISQO Audience members.

Behavioral Study

To assess how voter political affiliation may impact how people spend their time online — particularly with respect to how they seek out news and information — DISQO measured digital behavior in relation to self-reported political affiliation.

Behaviors were measured over a 107 day period, from October 1, 2019 through January 15, 2020. Of the 200,000 DISQO Audience members selected for the study, behaviors of 196,294 were assessed in the final analysis, 147,906 of whom are registered voters. For clarity, active time spent with each site was defined as the total number of seconds a user was on the given website wherein that tab or window of the browser was not in the background. Average total time spent for each cohort was then benchmarked against the group's norm for each site.

Attitudinal Survey

To understand voter sentiment and motivators, DISQO surveyed 16,080 members of the DISQO Audience. Results were collected over a two day period, from January 7, 2020 through January 8, 2020. Survey respondents were asked to share:

- Primary participation plans
- Past primary participation behaviors
- Understanding of the primary process
- Why they vote
- Attentiveness to the 2020 Presidential race
- November election participation plans

Key Findings

The results of the exercise and the first-look at the data were rather extreme. When we observe the digital news consumption of opposing political parties, it immediately becomes clear that political affiliation is a major driver of news source preference.

While some findings were to be expected, others were a bit more surprising. A few notable highlights are as follows:

- Non-voters tend to under-index across many categories of media consumption, but most notably so with respect to mainstream media news sites, suggesting a disconnect with the content published on these properties.
- Those registered to a political party followed expected media consumption behaviors, with Republicans over-indexing on FOX News (by 284%) and Democrats over-indexing on MSNBC (by 190%).
- Independent voters over-index across all major professional sport league websites.
- Where there are political nuances in how we shop, the magnitude of separation in these categories is significantly less than other areas.
- While our media consumption may be heavily influenced by our political perspectives, our motivations for voting are quite similar, with a majority of Democrats (56.4%), Republicans (57.0%), and Independents (52.5%) all expressing that they vote to support policies they believe in.
- The public is highly motivated to vote in November, with 80% of registered voters expressing that they plan to vote, and a notable majority of 60% of Democrats (60%), Republicans (60%), and Independents (55%) expressing a very strong commitment to voting.
- Democrats are paying the most attention to the 2020 presidential race, with 22.2% expressing they are extremely involved, and another 26.1% expressing they are very involved.



Voter Behaviors in 2020

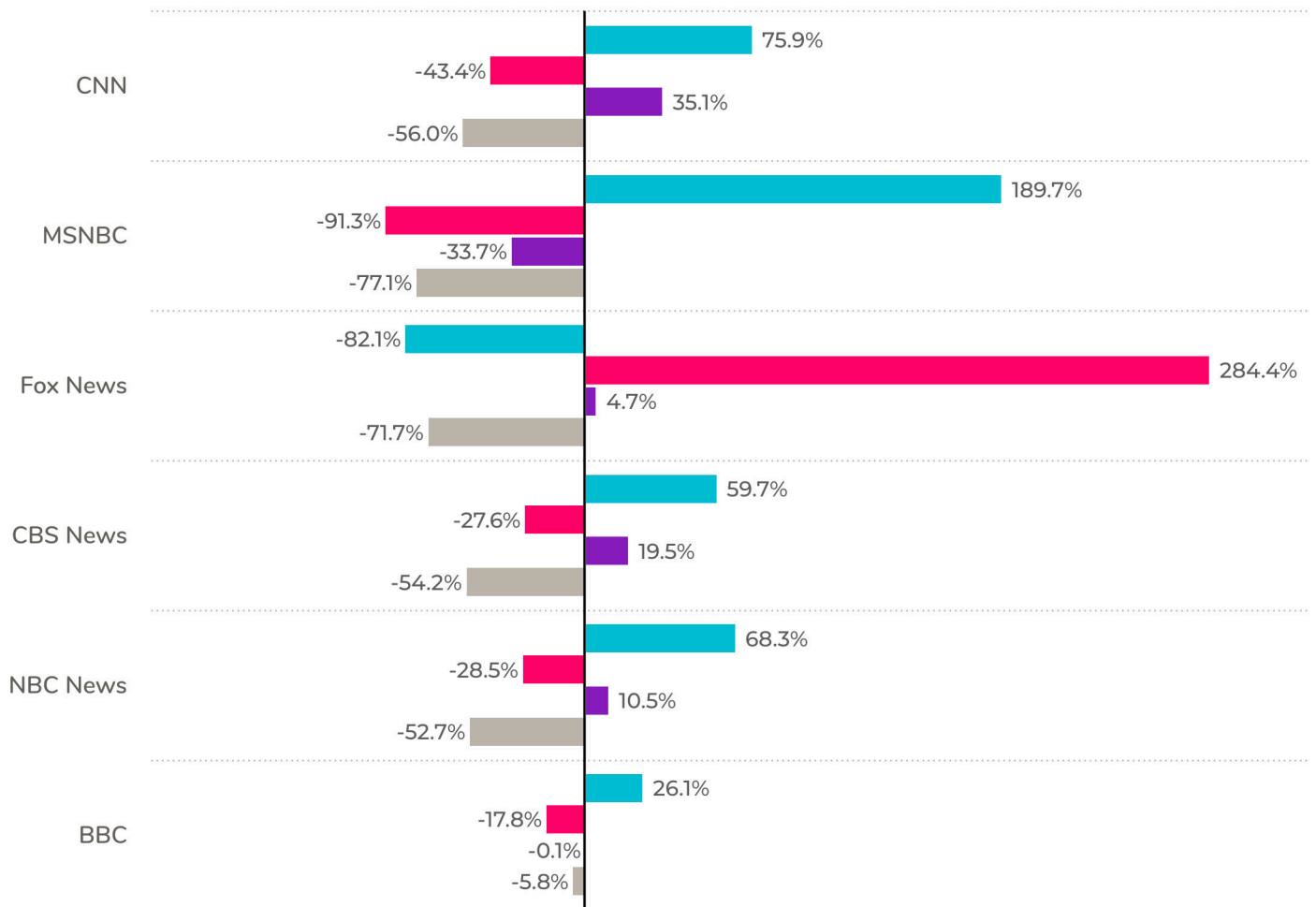
On the subsequent pages, we explore how an individual's political preference may affect how they spend their time online. Bars that extend to the right of the y-axis reflect cohort behavior that over-indexes compared to the general population. Conversely, bars that extend to the left of the y-axis reflect cohort behavior that under-indexes compared to the general population.

All figures are based on actual digital behaviors of nearly 200,000 members of the DISQO Audience, stratified based on the self-reported political affiliations of these individuals.

The individual sites chosen for comparison are those which had both significant volume across cohorts and a significant story to tell, whether those stories illustrate the ways that people are divided, or the ways that we are more alike than we might expect.

Mainstream News Consumption

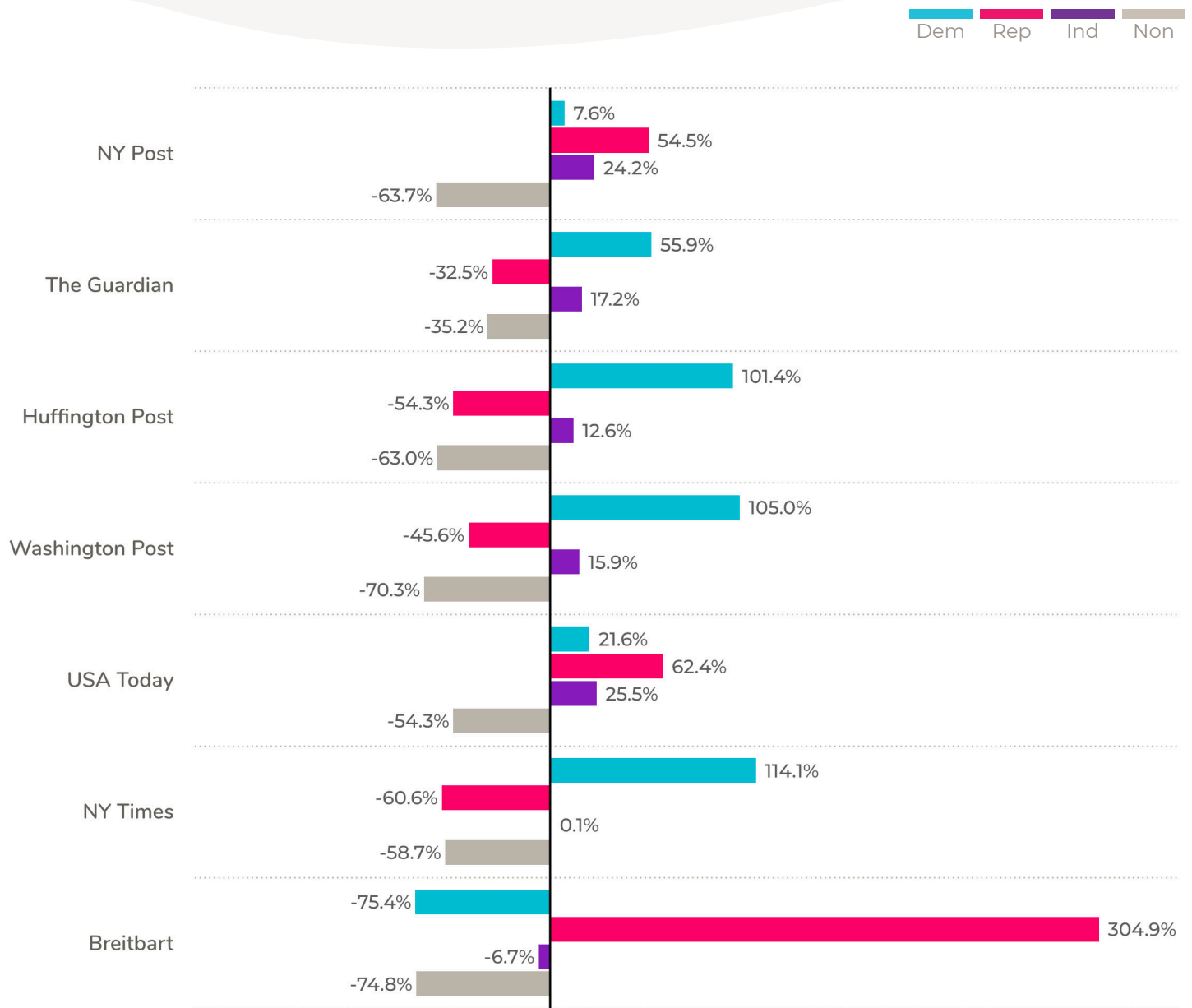
Dem Rep Ind Non



When assessing media consumption of news outlets that primarily offer video-based coverage, expected behaviors emerged. Specifically, individuals who self-report as registered Republican voters over-indexed on Fox News by 284%, and under-indexed across all other channels studied. Meanwhile, Democrats over-indexed on all other channels, though most notably so on MSNBC (190%) and CNN (76%).

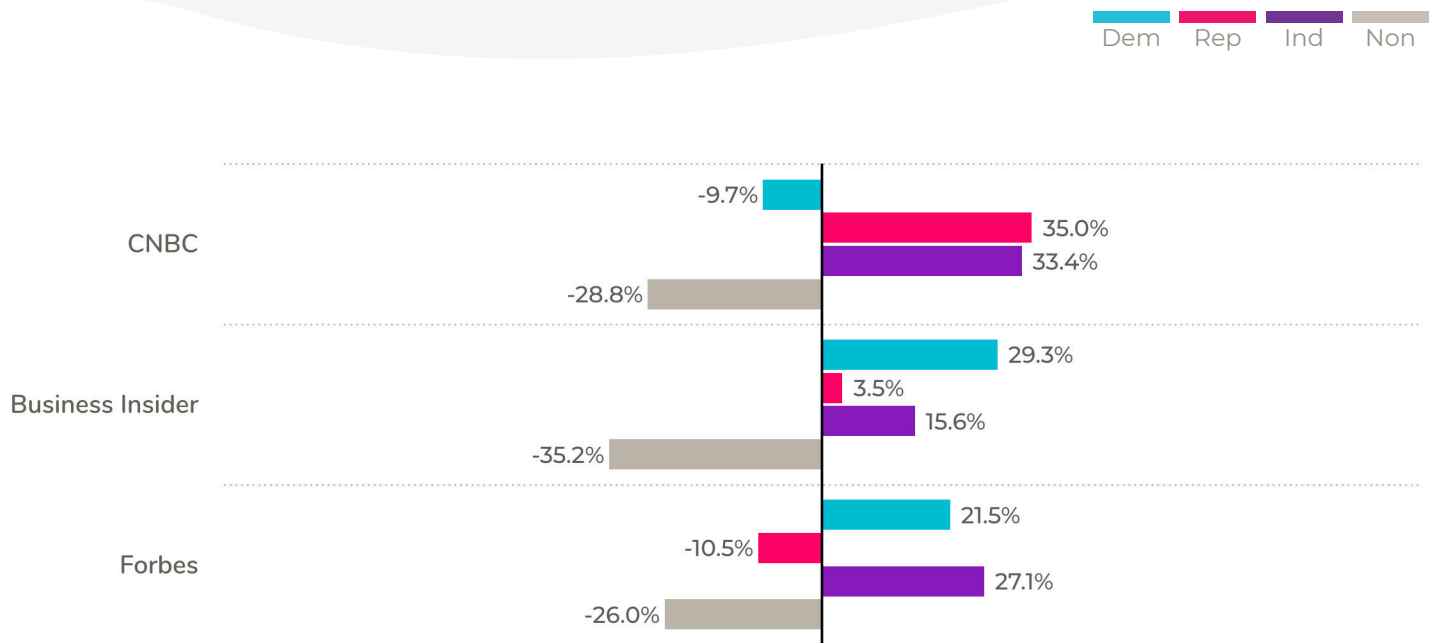
Interestingly, while independent voters over-indexed slightly across most channels, they showed a preference for CNN (at 35% over-index) over MSNBC (at 34% under-index). Meanwhile, individuals who are not registered to vote under-indexed across all video news channels, suggesting a significant disconnect from—and disinterest in—mainstream media news.

Editorial News Consumption



When reviewing media consumption of news sites that primarily offer article-based coverage, a few interesting patterns emerged. While most outlets had moderate levels of audience polarization, most still over-indexed with at least 2 audiences, even if slightly. However, Breitbart was the only site to over-index with just one voter group (Republicans at 304.9% over-index). Meanwhile, the New York Post and USA Today garnered the broadest appeal, with registered Democrats, Republicans, and Independents over-indexing on time spent compared to their non-voting counterparts.

Business News Consumption



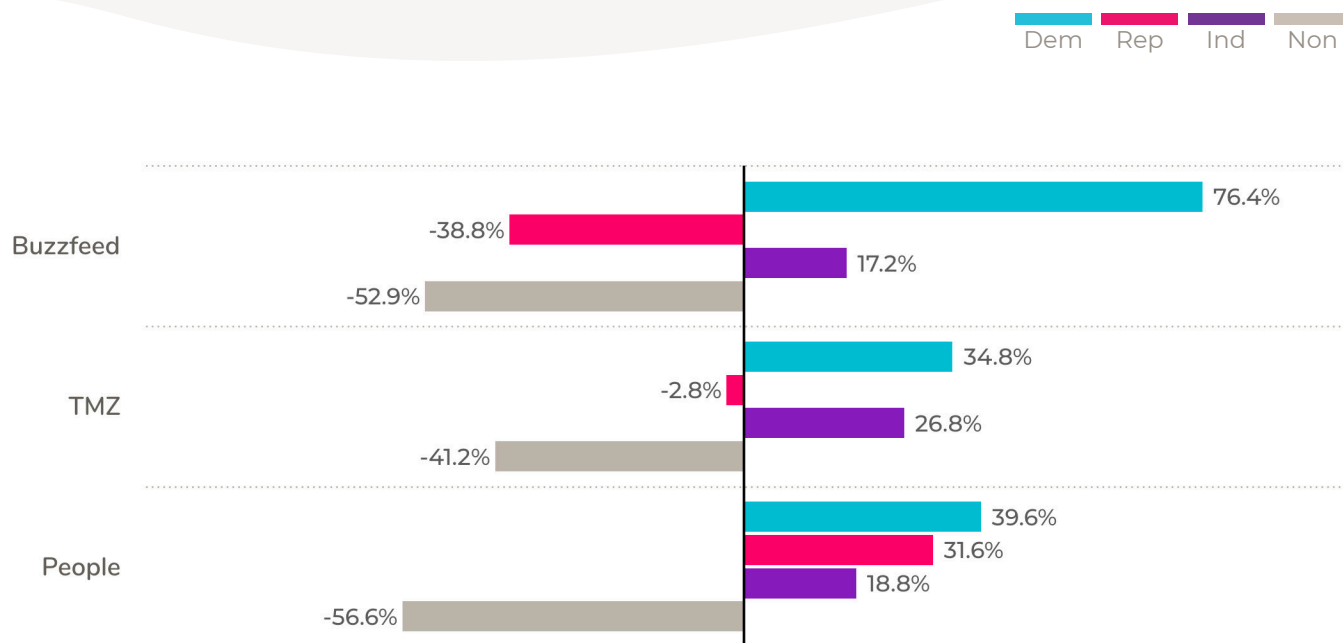
When assessing media consumption of news sites that primarily offer business and financial based content, polarization was less pronounced.

At most, groups over-indexed by 35% (as was the case with Republicans on CNBC) and under-indexed by 35.2% (as was the case with non-voters on Business Insider). Interestingly, independent voters over-indexed across all three sites, in contrast to non-voters who under-indexed in this category.

Delving a bit further into the data for CNBC, we found that Democrats of nearly every age and gender cohort over-indexed compared to their peers; the one exception was among Democratic men over the age of 65, who under-indexed on the site by 70.1% relative to their peers.

Among independent voters, the most notable activity was driven by independent women over 65, who over-indexed on the site by 256.2% compared to other women of the same age.

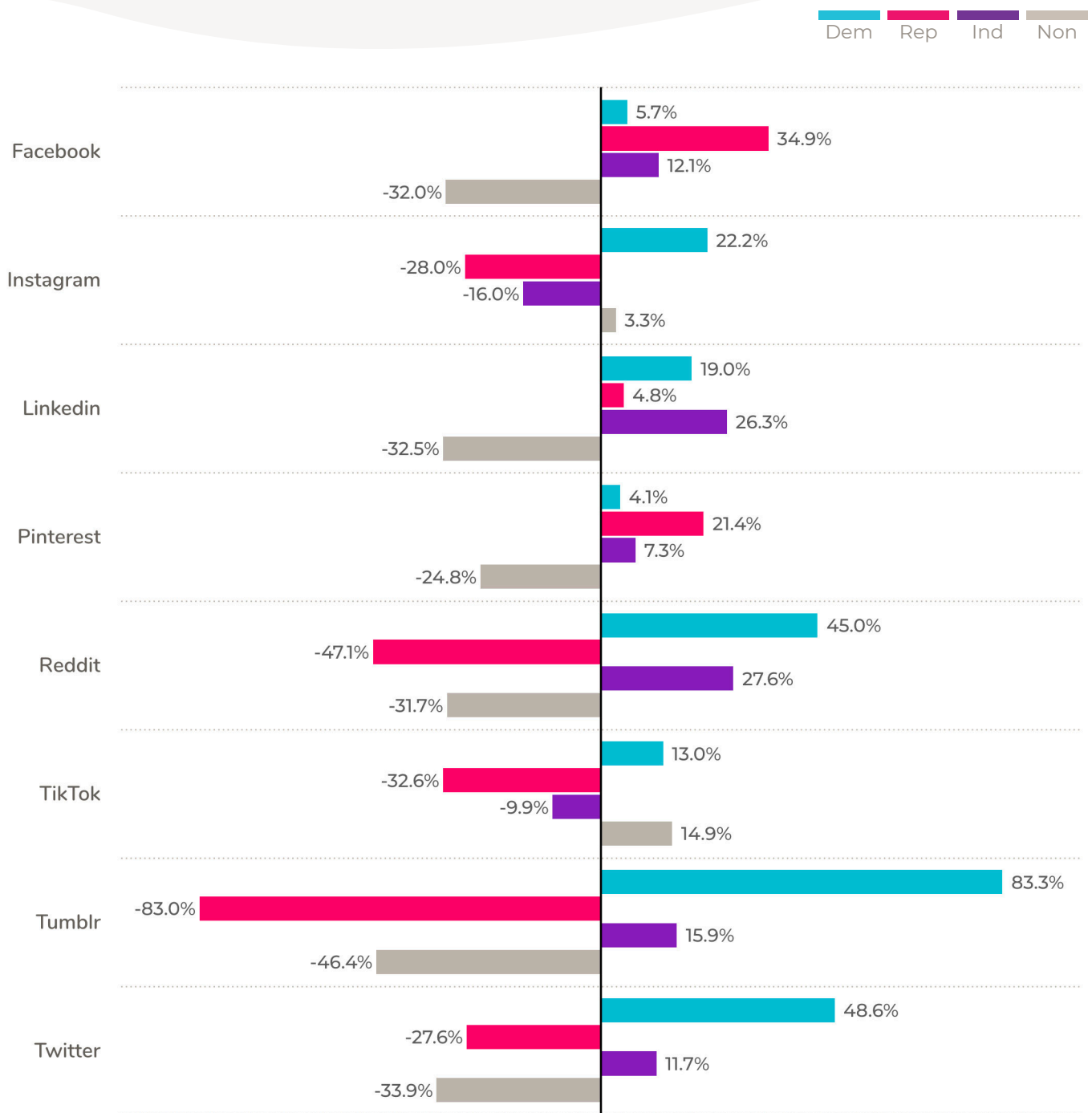
Entertainment News Consumption



When reviewing media consumption of websites that offer entertainment news, both Democrat and independent voters over-indexed categorically. Meanwhile, Republicans spend more time on People (over-indexing by 31.6%) than they did on BuzzFeed or TMZ (under-indexing by 38.8% and 2.8%, respectively).

Digging deeper into consumer behavior on BuzzFeed, the most notable delta between Democrats and other groups was among men aged 45 to 64. Compared to other men in the same age bracket, Democratic men in this age group spent 114.5% more time on BuzzFeed. Meanwhile, Republican men of the same age group under-indexed on BuzzFeed by 38.9%.

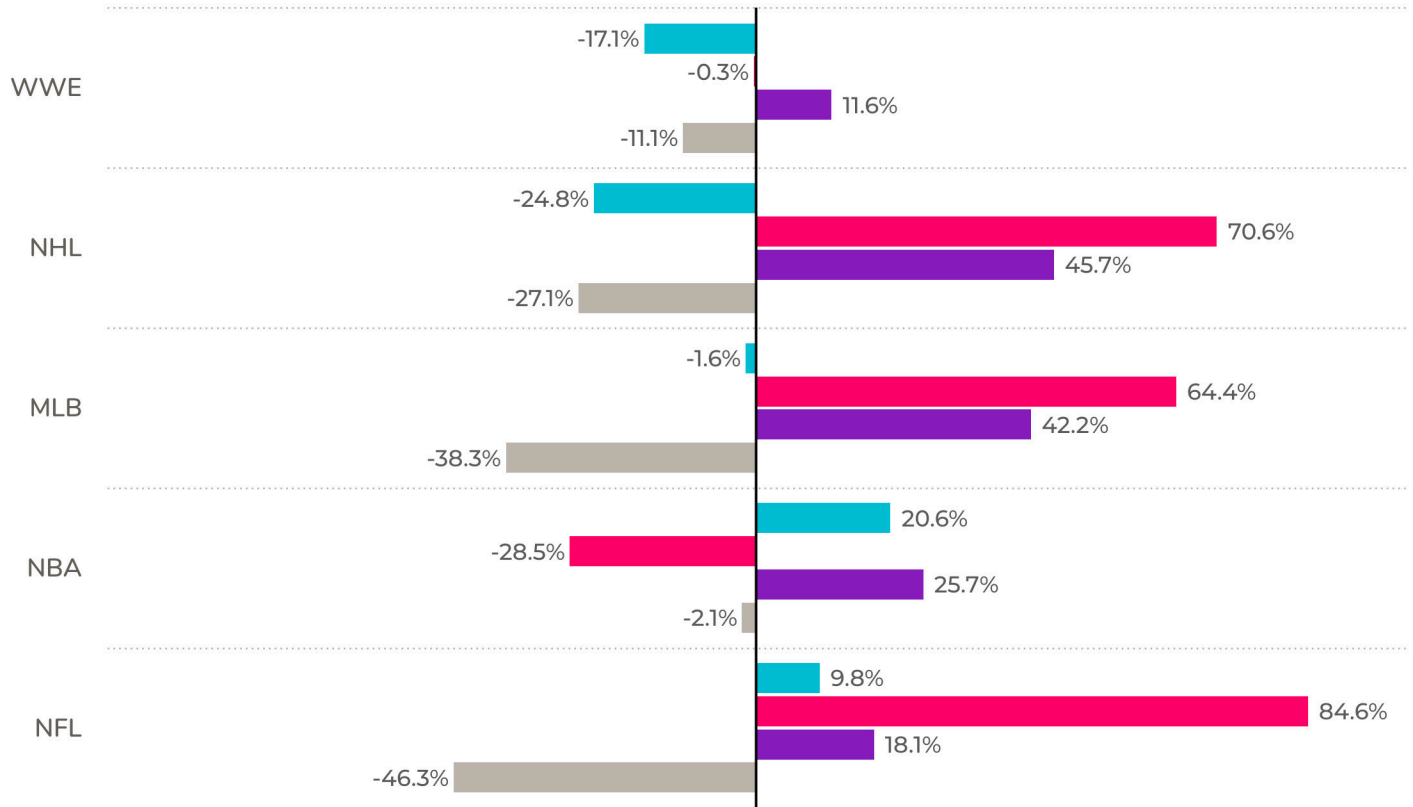
Social Media Time Spent



While much could be said about time spent on each social media site with respect to political affiliation, the most noticeable delta between parties was on Tumblr, where Democrats over-indexed by 93.3% and Republicans under-indexed by nearly the same amount (83.0%). Also interesting is that while non-voters tended to under-index across most social channels, they slightly over-indexed on both Instagram (3.3%) and TikTok (14.9%).

Professional Sports League Time Spent

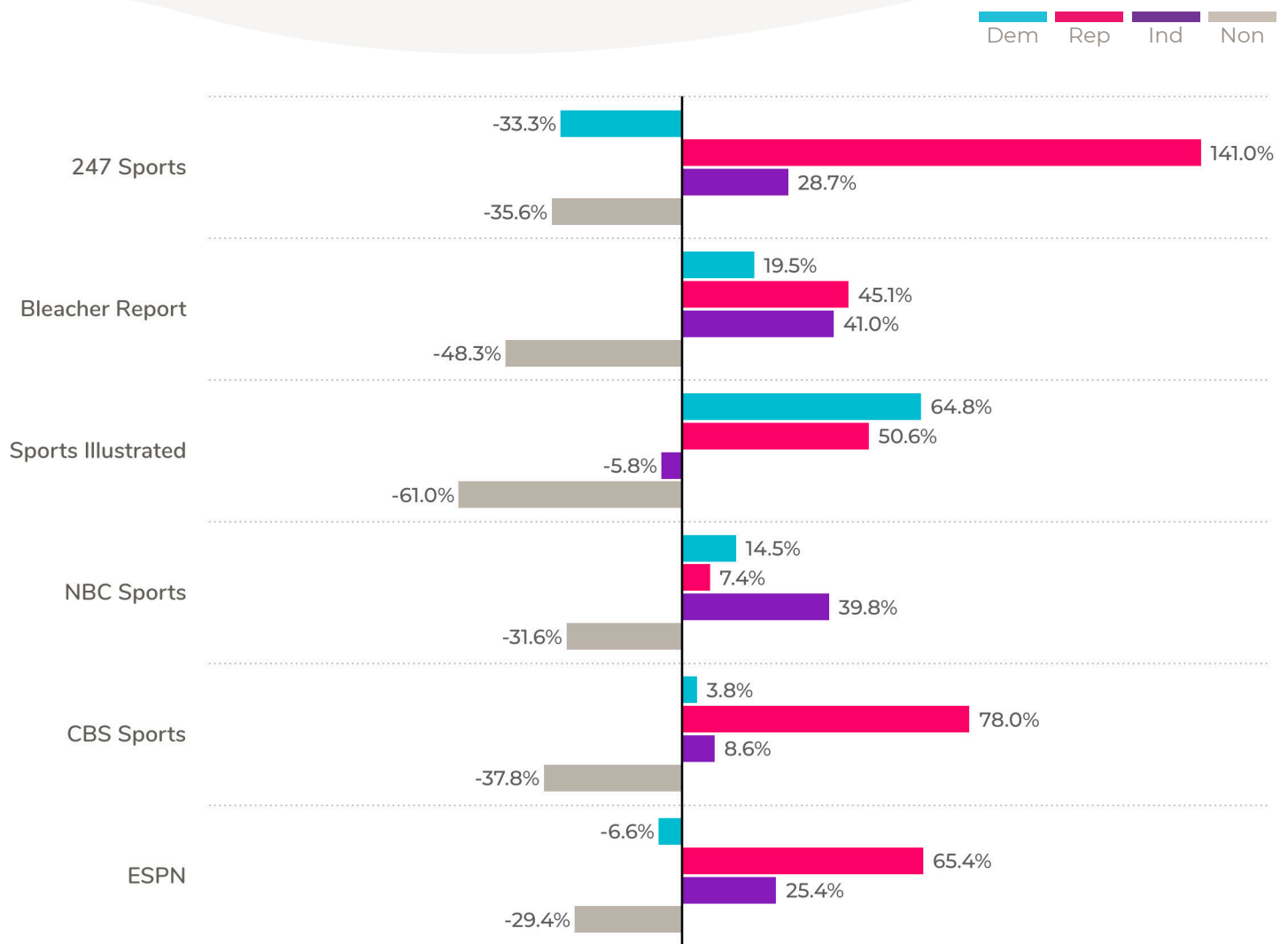
Dem Rep Ind Non



When examining audience behaviors with respect to the official league pages for professional sports, a few interesting trends emerged. First, independent voters over-indexed across all sports, but most notably so for the NHL and MLB websites.

Republican voters over-indexed for the NFL (84.6%), NHL (70.6%), and MLB (64.4%). While their time spent with the WWE site was exceptionally close to benchmark (just 0.3% below), Republicans notably under-indexed on the NBA's website (at 28.5% below benchmark).

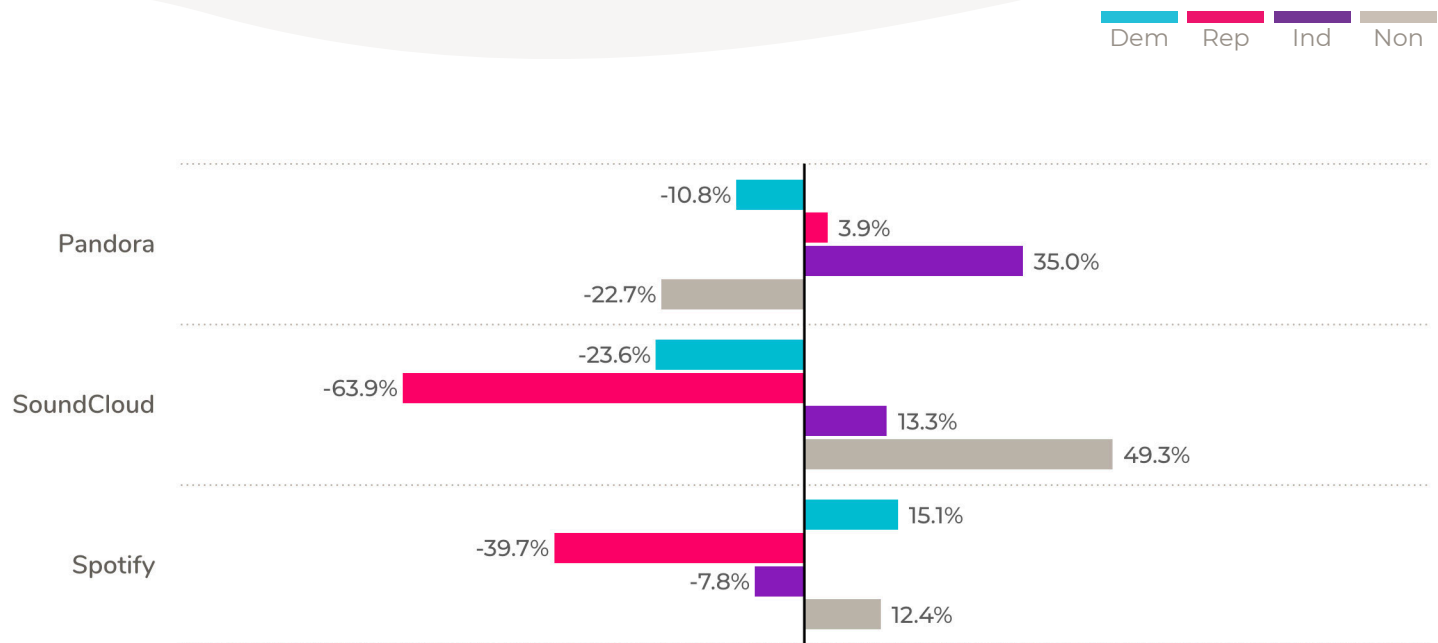
Sports News Consumption



Similar to media consumption of official league websites, time spent on sports news and entertainment properties also skewed heavily Republican. Most notably, Republican voters significantly over-indexed on 247Sports.com, spending 141% more time on the website than the audience benchmark.

The only site to lean more Democratic than other groups was Sports Illustrated, where Democrats over-indexed by 64.8%.

Music Streaming Time Spent



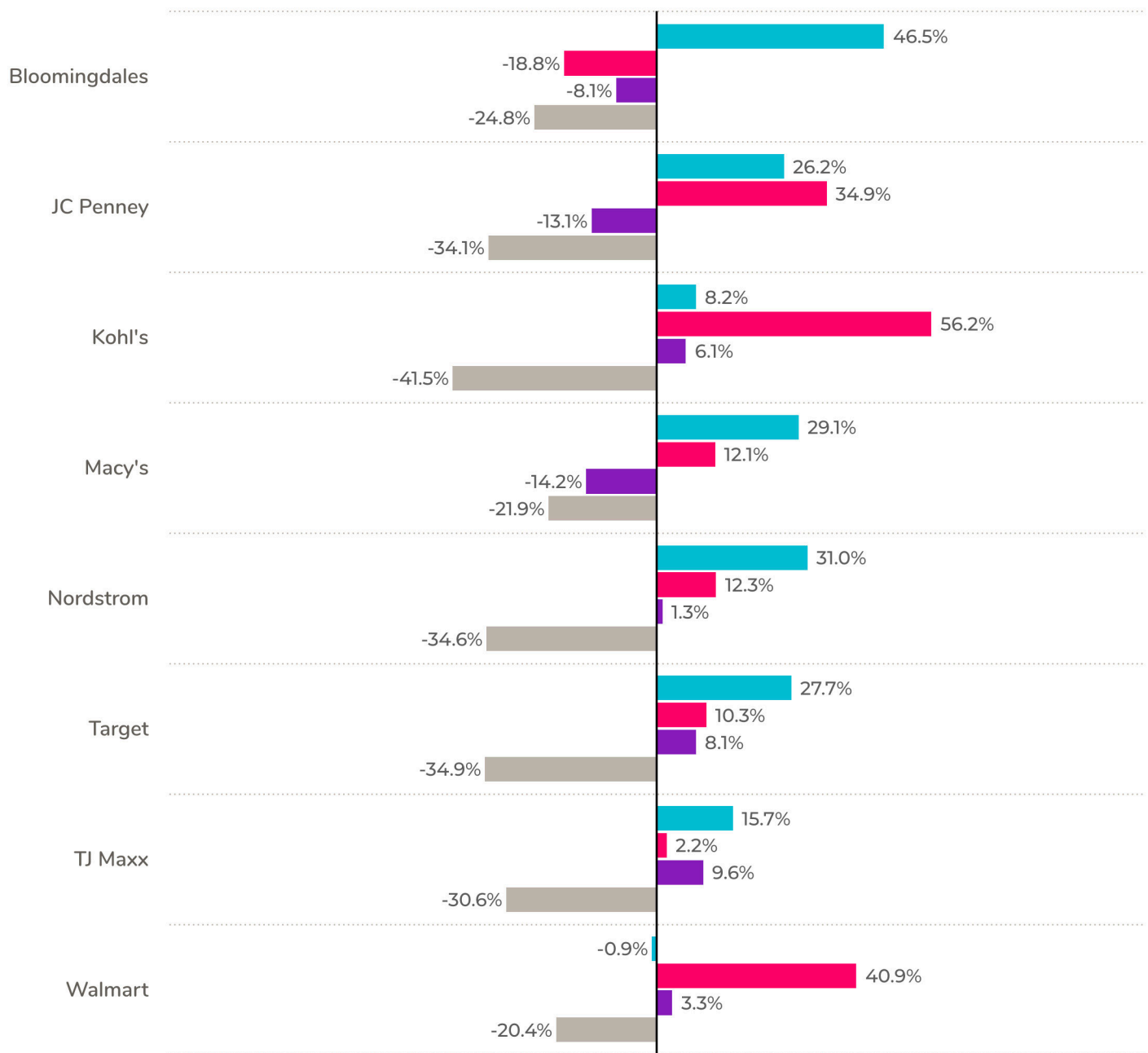
When examining time spent with popular music streaming services, Democrats favored Spotify, over-indexing on the site by 35%. Meanwhile, Republicans slightly favored Pandora, over-indexing by 3.9%, though this figure is overshadowed by independents who spend considerable more time on the service than any other group (over-indexing by 35%).

Delving deeper into behaviors by age and gender, a notable preference for Spotify was found among Democratic men 65 years old or older, who over-indexed compared to men in their age group by 114.8%, yet under-indexed on Pandora by 59.7%.

Delving deeper into behaviors by age and gender, we found that Pandora's popularity among Republican voters was driven by 3 groups: Republican men under the age of 24 (who over-indexed by 30.3% compared to their peers), Republican women between 25 and 44 years old (who over-indexed by 9.8% compared to their peers), and Republican men 25 to 44 years old (who over-indexed to a lesser degree at 3.3%).

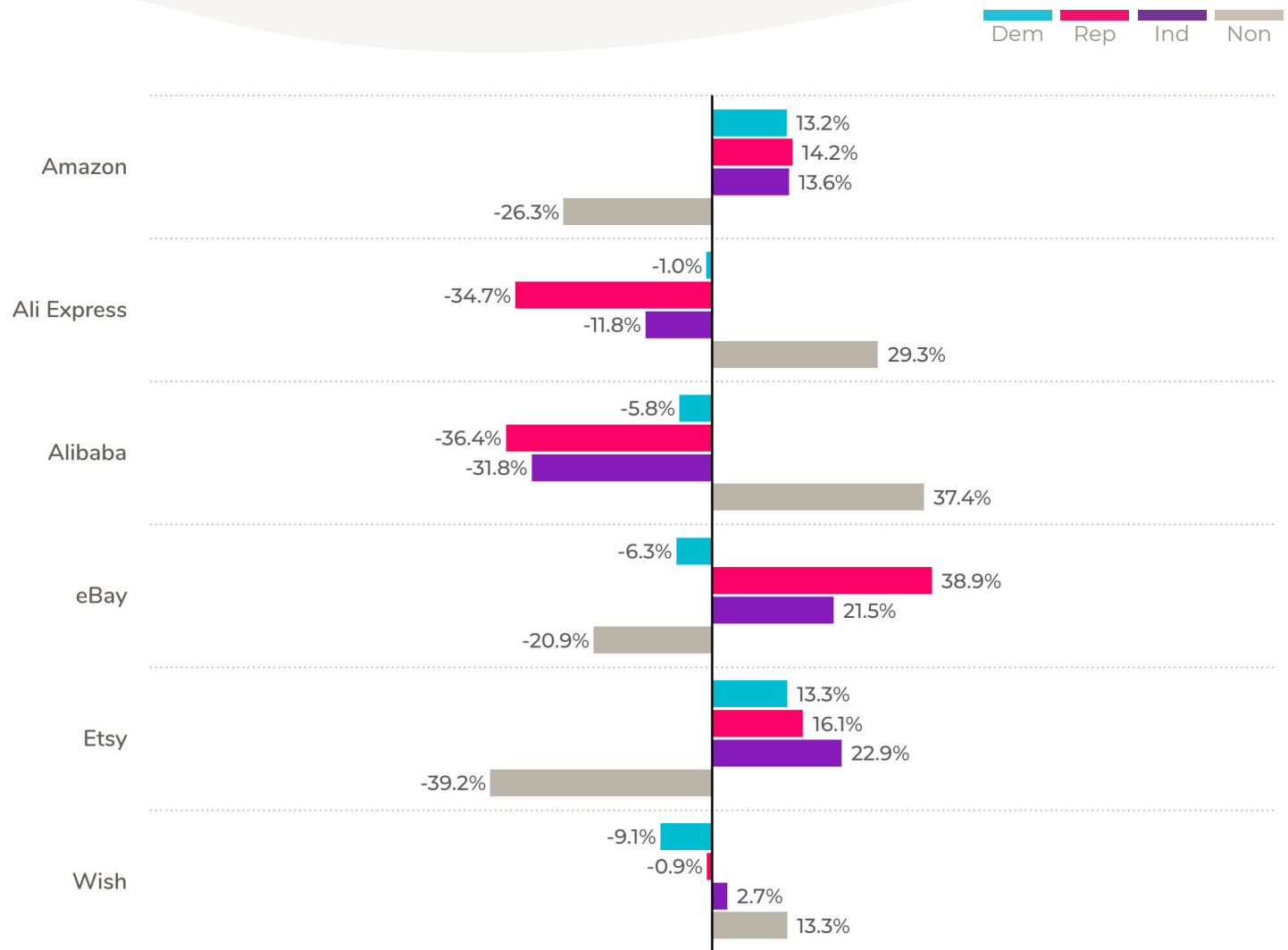
Online Department Store Browsing

Dem Rep Ind Non



When examining the department stores that people browse online, we found considerably less division along political lines, as evidenced by the greatest over-index being only 56.2%. The primary differences between voters were noticeable with site visitation to Bloomingdales, Kohl's, and Walmart. While Democrats spend more time with Bloomingdales and Republicans spend more time with Kohl's or Walmart, differences were less prominent for JC Penney and TJ Maxx.

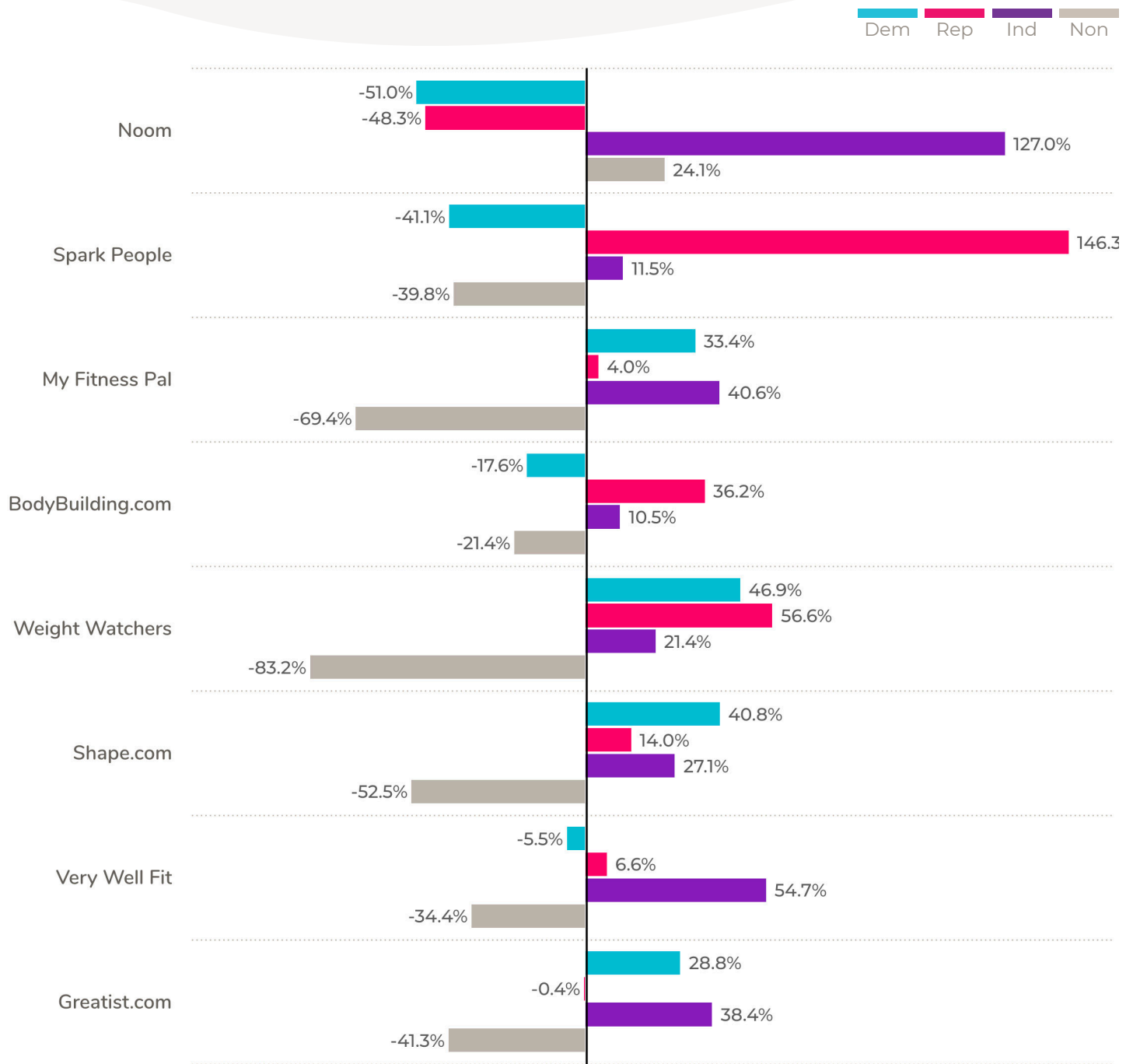
Ecommerce Browsing



Focusing on retailers that are ecommerce only, we found a few interesting trends. First, non-voters over-indexed across three top properties within the category, a rarity for the group. In particular, they over-indexed on Ali Express (29.3%), Alibaba (37.4%), and Wish (13.3%). Meanwhile, they served as the counter balance for activity on Amazon, where Democrats, Republicans, and independents alike slightly over-indexed. Similar synergy was found on Etsy, though independents lead activity here, spending 22.9% more time on the site than any other group.

Interestingly, Republicans and independents were the least likely to spend time shopping on a site owned by a Chinese company (such as Ali Express and Alibaba), whereas those disconnected from politics were the most likely.

Health & Fitness Browsing



Examining audience behaviors on health and fitness related websites, we found two rather strong trends. First, Republican voters significantly over-indexed on Spark People, spending 146% more time on the site than other groups. Second, independent voters significantly over-indexed on Noom, spending 127% more time on the site than the audience average. Behaviors among voters were more closely aligned on most other sites, with both Democrats and Republicans over-indexing similarly on Weight Watchers while under-indexing on Noom.



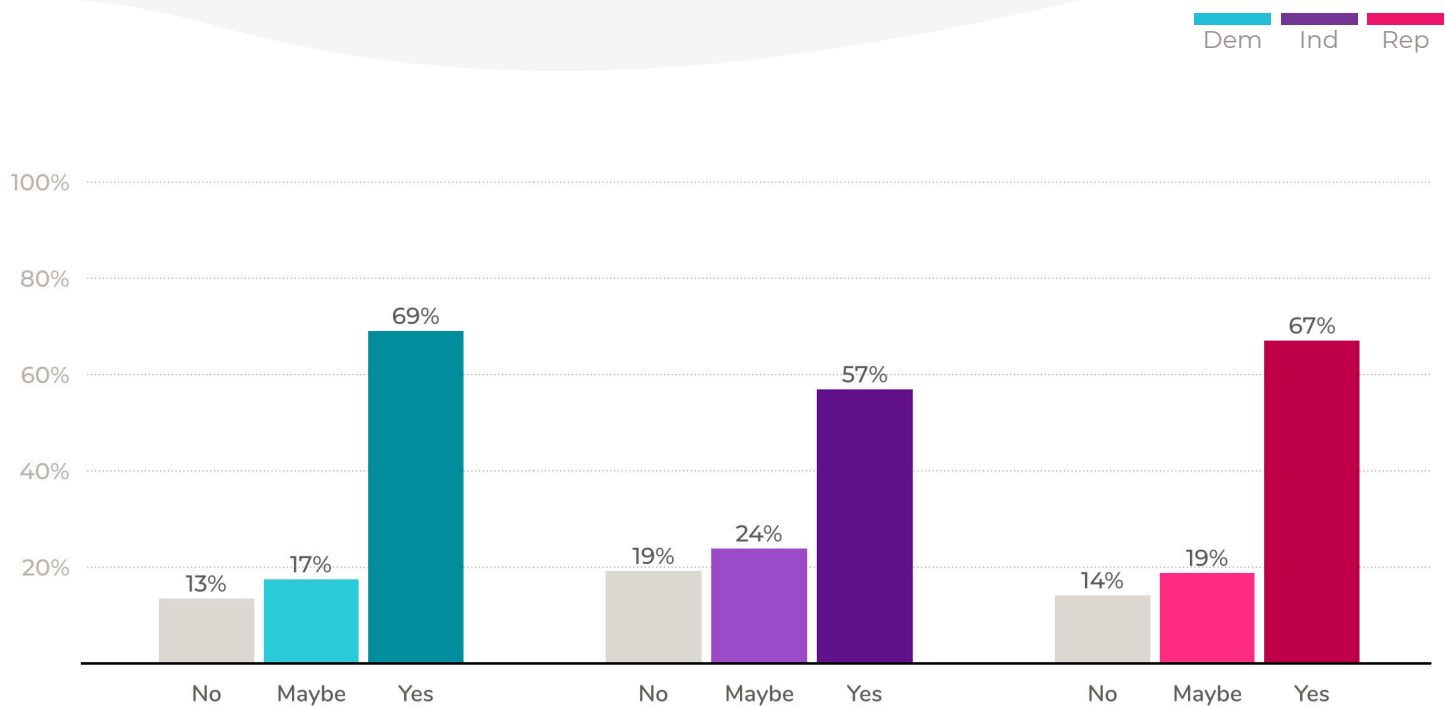
Voter Sentiment in 2020

While the previous behavioral analysis of media consumption with relation to political affiliation offers some insight into where people spend their time, it is equally important to explore how people feel, what their motivators are, and how likely they are to act upon the media they see.

Thus, on the subsequent pages, we explore how voters feel entering the 2020 election cycle. Are they planning to participate in their state's primary or caucus? How well do they understand that process? Are there notable nuances between parties or states? How interested are people in November elections, and what motivates them to vote?

Responses to these questions and more were answered by over 16,000 members of the DISQO Audience.

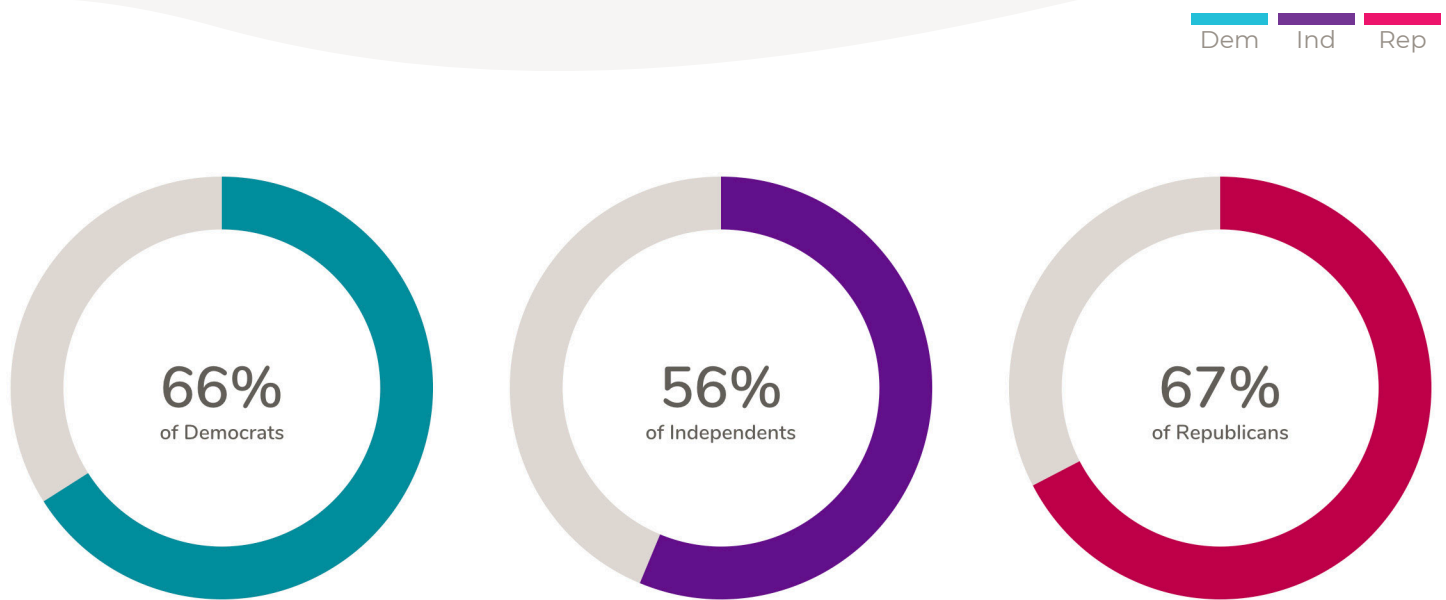
Planned Participation in 2020 State Primary or Caucus



Across the board, a majority of respondents reported interest in participating in their state's Presidential primary or caucus in 2020. Specifically, 58.9% of individuals stated that they do plan to participate, and another 21.5% stated that they might.

When examining these responses between by political affiliation, responses between registered Democrats and Republicans were similar, with 69.1% of Democrats attesting that they plan to participate in their state's primary or caucus, compared to 67.0% for Republicans. Notably, fewer independent voters expressed that they planned to participate (57.0%).

Previous Participation in 2016 State Primary or Caucus



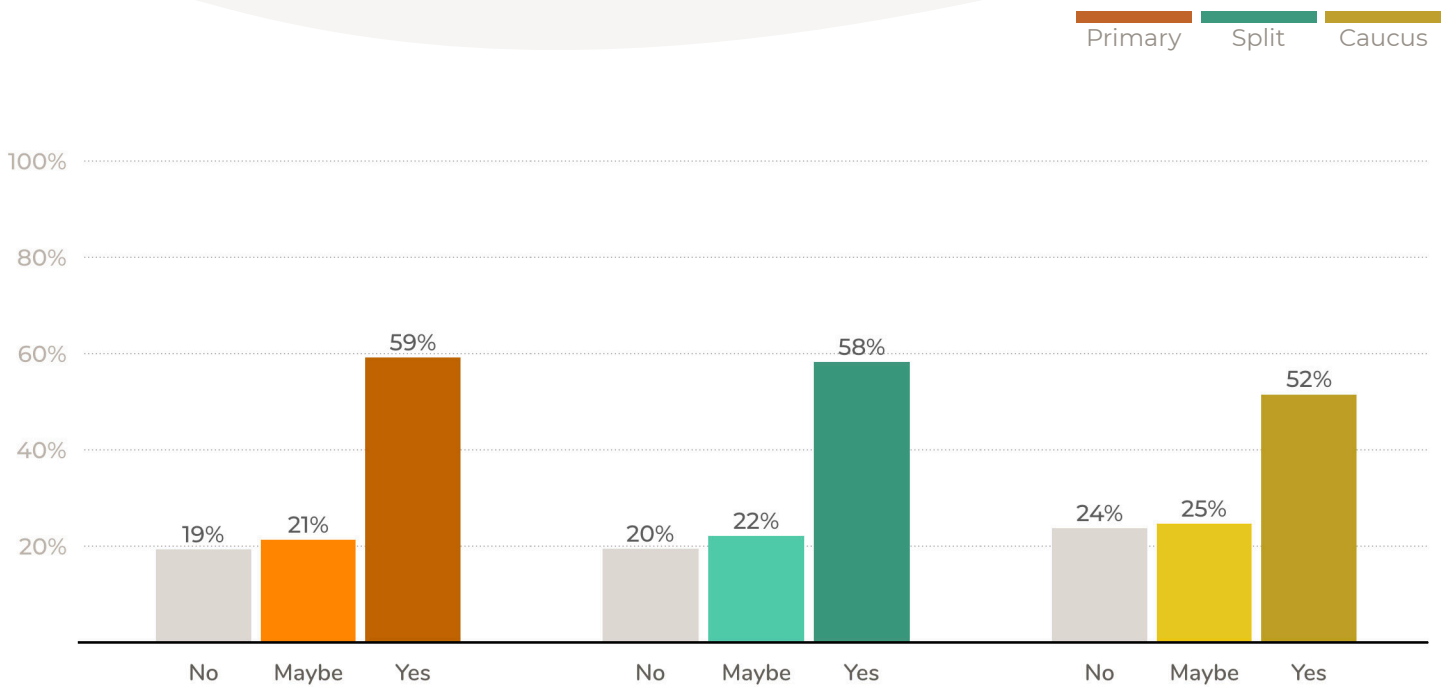
To get a sense of how planned participation in the 2020 presidential primary process might compare to the previous cycle in 2016, we asked each respondent to share whether they had voted in the 2016 presidential primary process.

Interestingly, the number of people who report to have voted in the 2016 cycle is quite close to the number of people who are planning to vote during the 2020 primaries and caucuses.

For instance, 67% of Republicans reported voting in 2016, the same number that reported planning to participate in 2020. Granted, the correlation here was not 1:1, as only 86.9% of previous Republican primary participants confirmed that they are planning to participate this year, 10.7% remain on the fence, and 2.3% are not planning to participate.

Similarly, 88.1% of 2016 Democratic primary participants plan to participate in the 2020 primary process, with only 9.9% on the fence and 1.9% disengaged.

Planned Participation in Primary or Caucus by Process



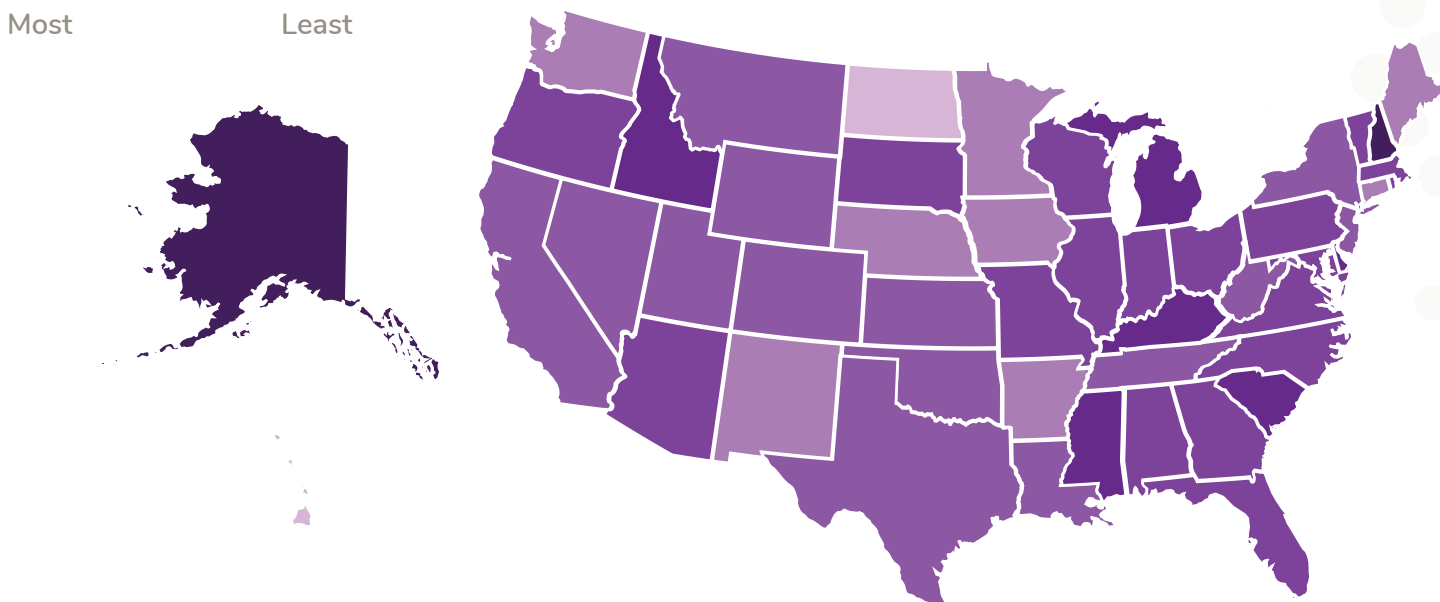
Understanding that participation in the process may also be affected by the type of participation required, we examined responses based on the type of process utilized in the state of each respondent.

As one might expect, planned participation was highest in states that host primaries for both parties (59.2%), and lowest in states that host caucuses for both parties (51.3%). States that split their process by party fell between the two (58.3%).

A visualization of planned participation by state as well as a data breakout for each is available on the following page.

Planned Participation in Primary or Caucus by State

Most Least

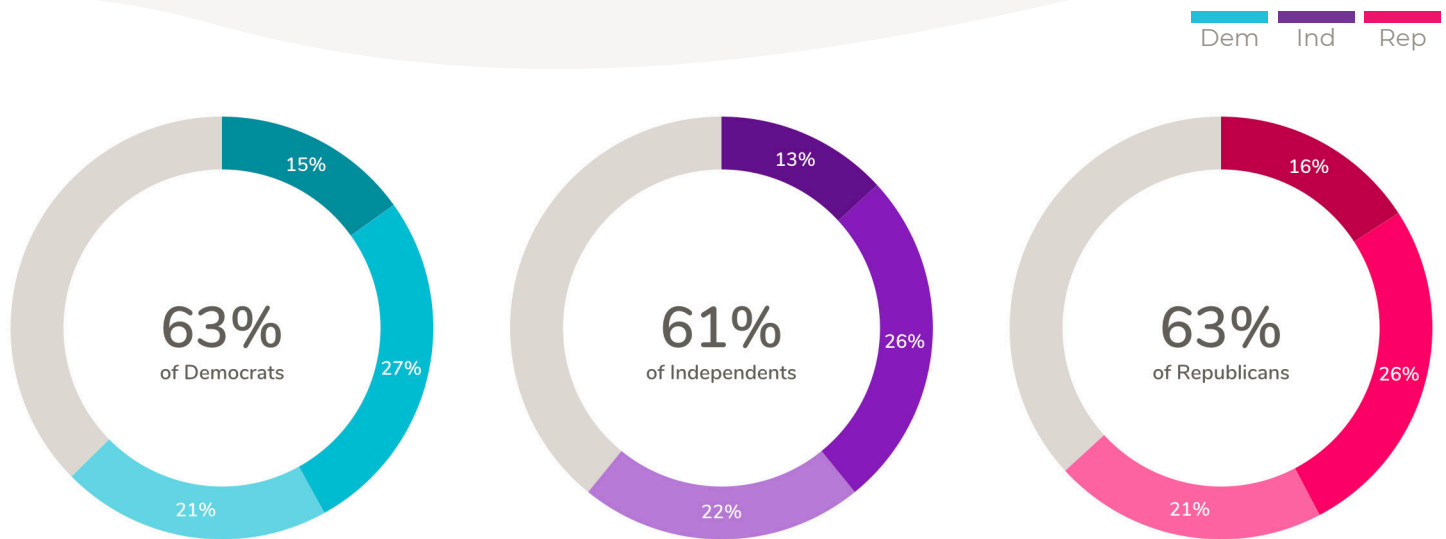


State	Yes	Maybe	No
Alabama	61.1%	24.0%	14.9%
Alaska	73.3%	20.0%	6.7%
Arizona	63.3%	16.9%	19.8%
Arkansas	52.0%	24.5%	23.5%
California	59.5%	19.8%	20.6%
Colorado	56.7%	24.1%	19.2%
Connecticut	50.8%	24.3%	24.9%
Delaware	67.7%	19.4%	12.9%
Florida	60.8%	19.0%	20.2%
Georgia	61.5%	20.2%	18.3%
Hawaii	45.2%	25.8%	29.0%
Idaho	60.0%	31.7%	8.3%
Illinois	61.1%	20.1%	18.8%
Indiana	62.8%	18.0%	19.2%
Iowa	47.2%	26.8%	26.1%
Kansas	55.0%	28.0%	17.0%
Kentucky	68.8%	17.2%	14.0%

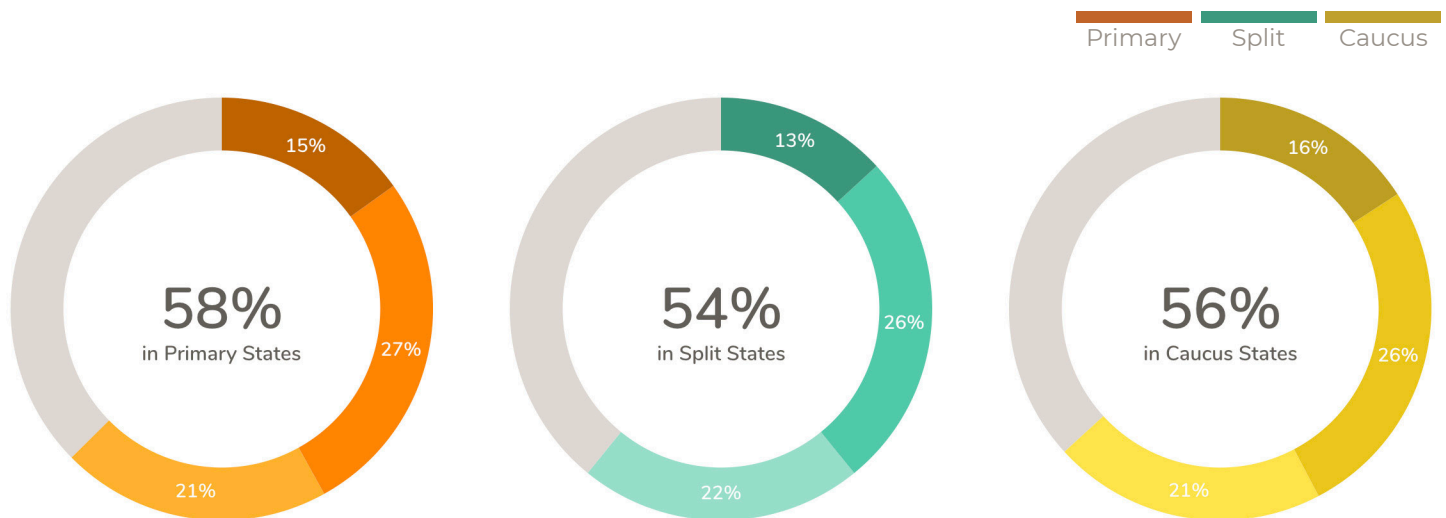
State	Yes	Maybe	No
Louisiana	53.2%	28.1%	18.7%
Maine	49.2%	23.8%	27.0%
Maryland	64.9%	17.5%	17.5%
Massachusetts	59.5%	23.9%	16.6%
Michigan	66.9%	17.7%	15.4%
Minnesota	49.1%	23.3%	27.5%
Mississippi	68.4%	19.0%	12.7%
Missouri	62.0%	22.3%	15.7%
Montana	52.8%	30.6%	16.7%
Nebraska	54.3%	20.7%	25.0%
Nevada	55.7%	20.9%	23.4%
New Hampshire	75.0%	12.5%	12.5%
New Jersey	53.4%	24.4%	22.2%
New Mexico	56.9%	15.4%	27.7%
New York	53.9%	23.9%	22.3%
North Carolina	60.0%	21.2%	18.8%
North Dakota	27.3%	36.4%	36.4%

State	Yes	Maybe	No
Ohio	58.5%	23.6%	17.9%
Oklahoma	53.8%	25.0%	21.2%
Oregon	63.5%	21.3%	15.2%
Pennsylvania	60.6%	18.9%	20.6%
Rhode Island	62.5%	21.4%	16.1%
South Carolina	64.6%	21.1%	14.3%
South Dakota	61.1%	22.2%	16.7%
Tennessee	58.5%	22.7%	18.8%
Texas	56.0%	24.0%	20.0%
Utah	54.4%	23.8%	21.8%
Vermont	59.1%	27.3%	13.6%
Virginia	62.1%	18.9%	18.9%
Washington	51.8%	25.2%	22.9%
West Virginia	57.5%	24.7%	17.8%
Wisconsin	59.3%	24.4%	16.3%
Wyoming	58.3%	16.7%	25.0%

Understanding of the Primary & Caucus Process

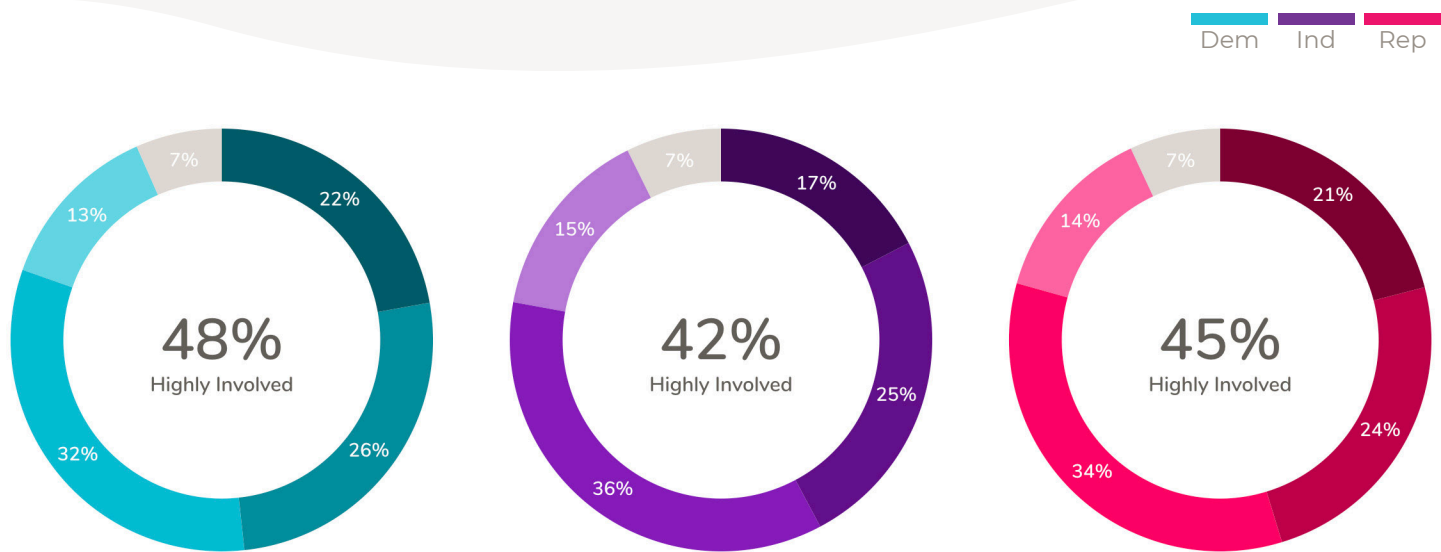


As people are more apt to engage in that which they understand, we sought to uncover whether there were any fundamental differences in audience understanding of the primary and caucus process by political party. In this respect, we found that voters who are affiliated with a political party are equally confident in their understanding of the primary or caucus process of their state. Independent voters trailed slightly in this regard, though not notably.



Taking our exploration of audience understanding one step further, we stratified responses based on the primary or caucus process in the individual's state. From this perspective, a slight delta was found: people who live in states with primaries are more likely to understand their primary process than people who live in caucus or split process states.

Attention Paid to the 2020 Presidential Race



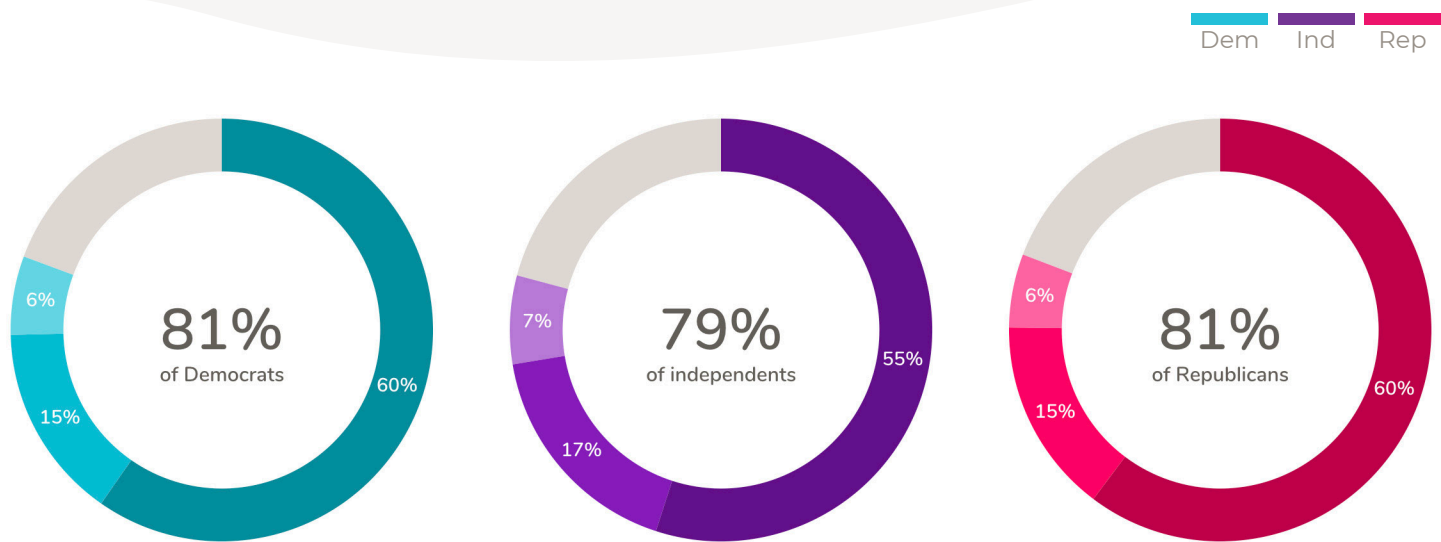
While we sought to pay attention to voter behaviors and attitudes, we also wanted to assess how much voters are paying attention this election season.

Unsurprisingly given the number of Democratic candidates vying for voter support and attention, individuals who identified as registered Democrats were also the most highly engaged group.

Involvement	Democrat	Independent	Republican
Extremely	22.2%	17.4%	21.0%
Very	26.1%	24.8%	24.3%
Somewhat	32.1%	35.7%	34.1%
Slightly	13.0%	14.8%	13.7%
Not At All	6.6%	7.3%	7.0%

Granted, reported voter attentiveness was relatively high across all groups, with 48% of Democrats, 45% of Republicans, and 42% of Independents reporting being highly involved in the 2020 election cycle. The more noticeable difference was among people who reported being “extremely involved”, where independent voters trailed at 17% compared to Democrats at 22% and Republicans at 21%.

Plans to Vote in November



How does voter primary participation and overall attentiveness relate to their plans to go to the ballot box this November?

As with other topics covered in the study, both Democrats and Republicans are highly engaged this election cycle and plan to participate at nearly identical rates, followed closely by independents.

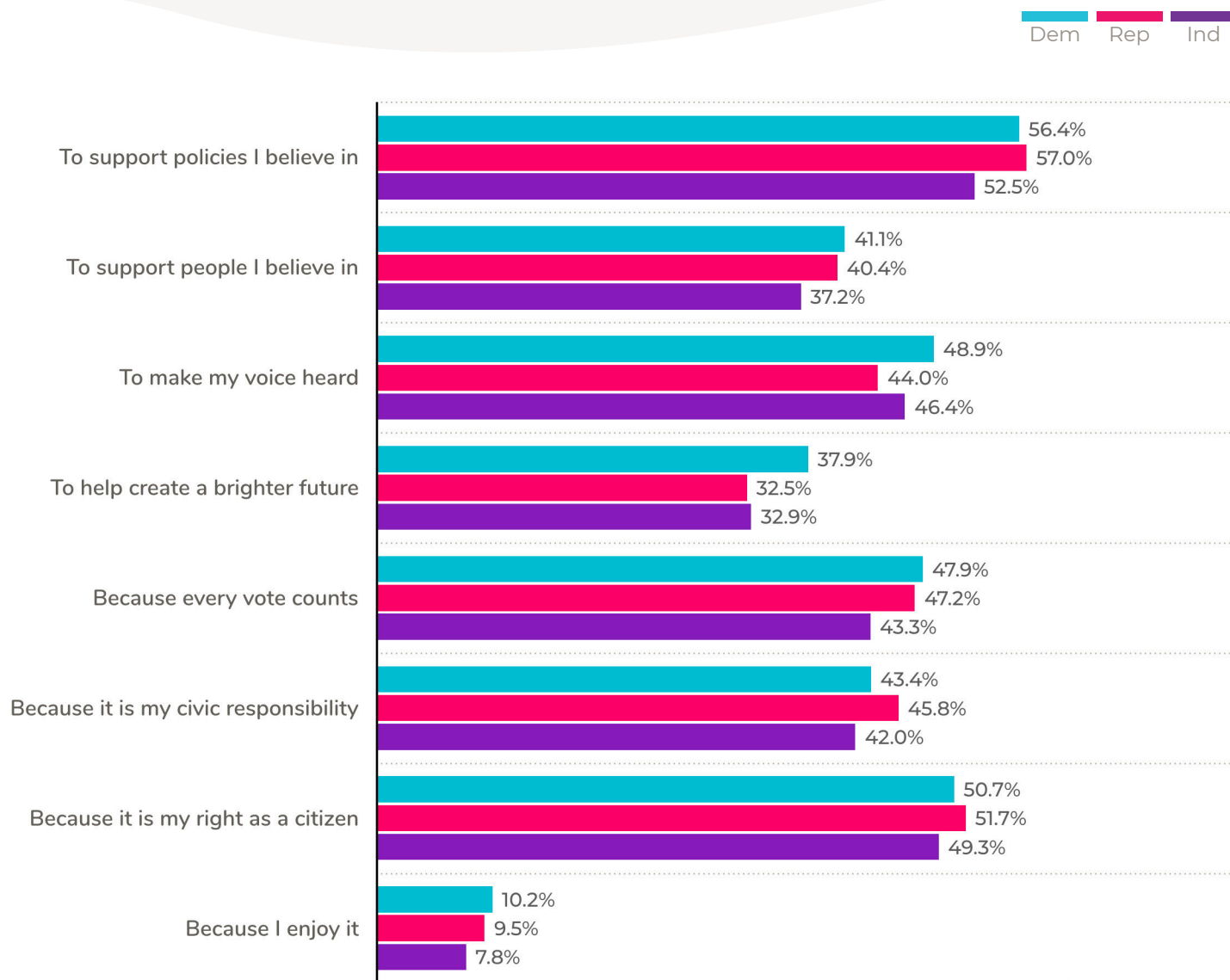
Indeed, the margin of difference was so slight in this regard that it can only be expressed within the tenths of a percent.

Voting in November	Dem	Ind	Rep
Strongly Agree	59.7%	55.0%	60.2%
Agree	15.0%	17.4%	14.9%
Somewhat Agree	6.0%	6.8%	5.6%
Neutral	7.8%	9.8%	7.8%
Somewhat Disagree	1.8%	2.1%	1.6%
Disagree	1.8%	2.1%	1.8%
Strongly Disagree	7.9%	6.8%	8.0%

For instance, 59.7% of Democrats strongly agreed with the statement “I plan on voting during the general election in November” compared to 60.2% of Republicans.

When looking at likely voters — based on previous primary or caucus participation — enthusiasm was even higher and still similar between the two parties. Among this cohort, 70.4% of Democrats and 71.1% of Republicans strongly agreed that they would be voting in November.

Why People Vote



Perhaps the most unifying aspect of our study — and thus the note we will leave on — is why people vote. Across the board, motivations for voting are well aligned.

Whether they over-index on one news site or another, whether they understand their state's primary process or not, and whether they pay attention to every political ad or debate, people vote to support the policies they believe in.



About DISQO

DISQO is a consumer-first insights platform that delivers unprecedented data and analytics to the market research industry. The company powers insights professionals and marketers with automated solutions that drive consumer research and improve ad effectiveness.

Today, DISQO delivers an accurate and complete view of the consumer via technology built on the foundation of the largest first-party research audience.

By engaging consumers who choose to share their attitudes and behaviors, DISQO captures the highest quality data, empowering its clients to make confident decisions.

A hand holding a piece of paper, with a ring visible on the finger. The image is overlaid with a purple gradient and a dotted pattern. The text "DISQO" is in the top right corner.

DISQO

What will you discover?