The Media Zones Where People Live
And How to Connect With Them

Lee Rainie

Director, Pew Research Internet Project

July 31, 2014

Knight Digital Media

Portland

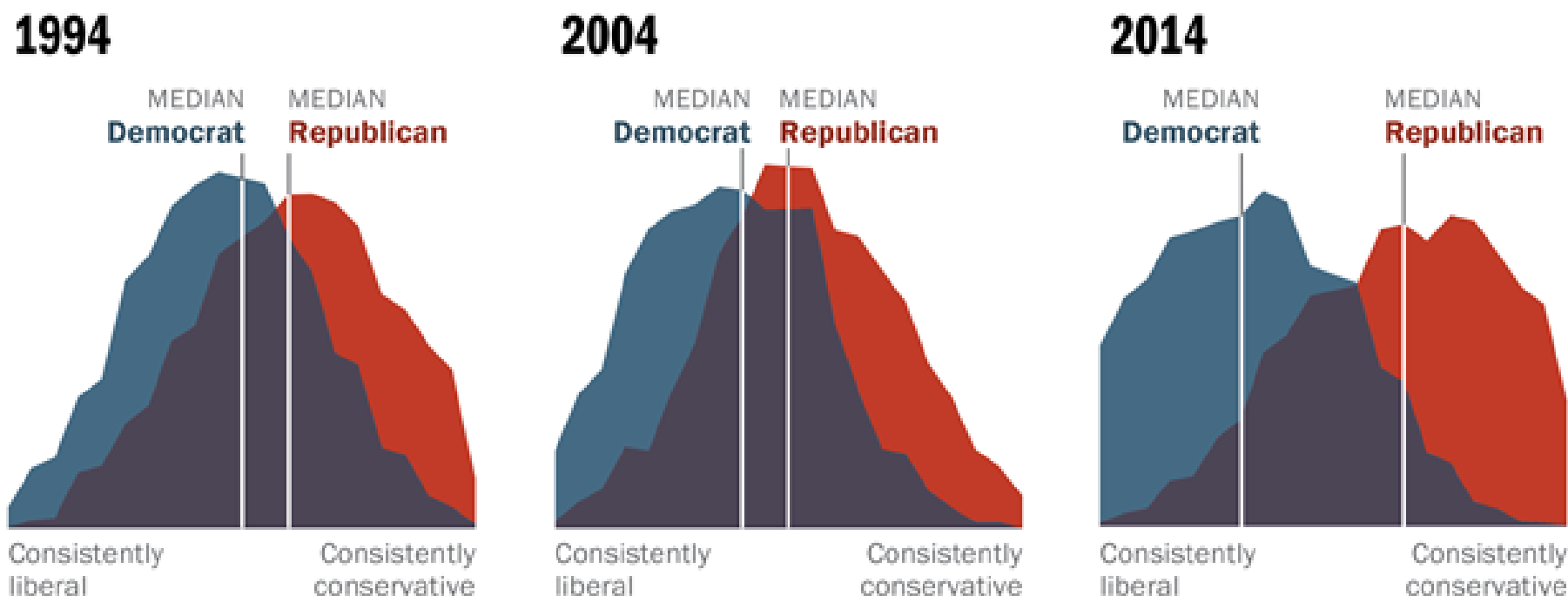# Polarization is the dominant story of political and media life in this era

Democrats and Republicans have been growing apart in their beliefs and attitudes

Democrats and Republicans More Ideologically Divided than in the Past

Distribution of Democrats and Republicans on a 10-item scale of political values

1994

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal — Consistently conservative

2004

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal — Consistently conservative

2014

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal — Consistently conservative

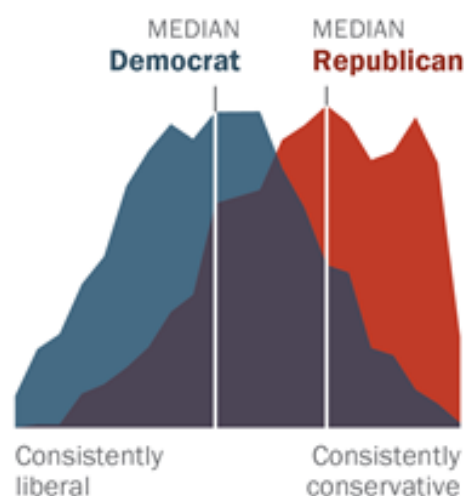Source: 2014 Political Polarization in the American Public
Notes: Ideological consistency based on a scale of 10 political values questions (see Appendix A). The blue area in this chart represents the ideological distribution of Democrats; the red area of Republicans. The overlap of these two distributions is shaded purple. Republicans include Republican-leaning independents; Democrats include Democratic-leaning independents (see Appendix B).

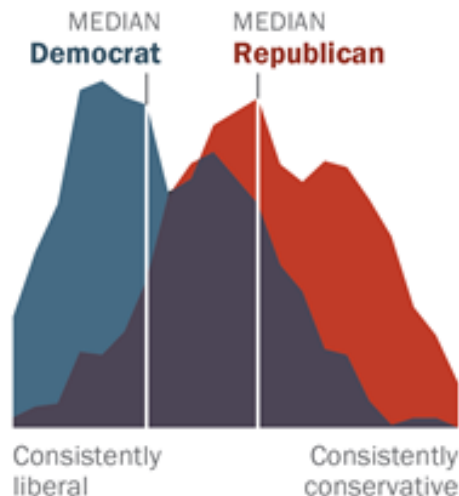# Polarization Surges Among the Politically Engaged

Distribution of Democrats and Republicans on a 10-item scale of political values, by level of political engagement

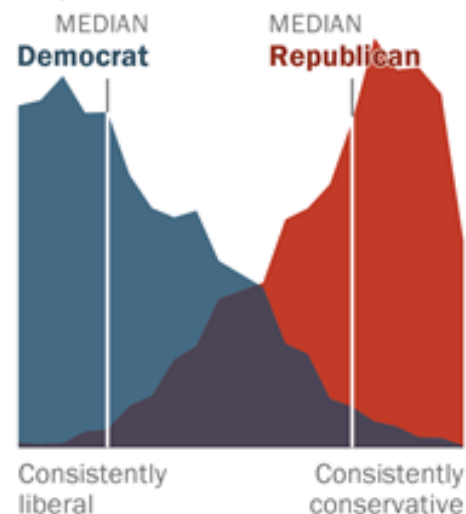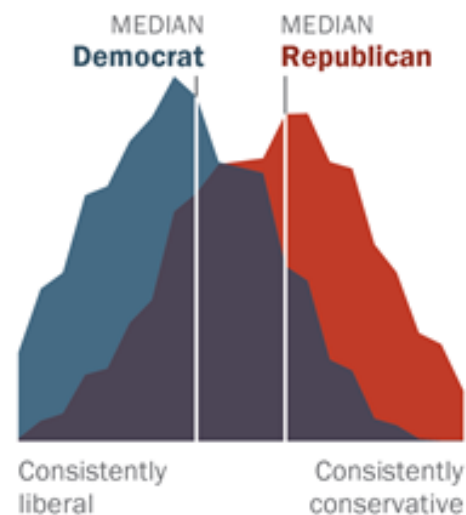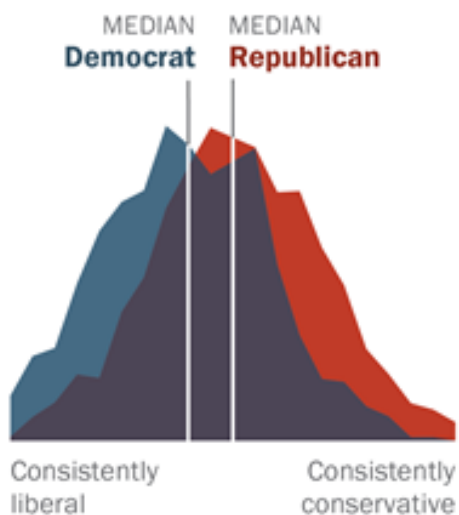## Among the politically engaged

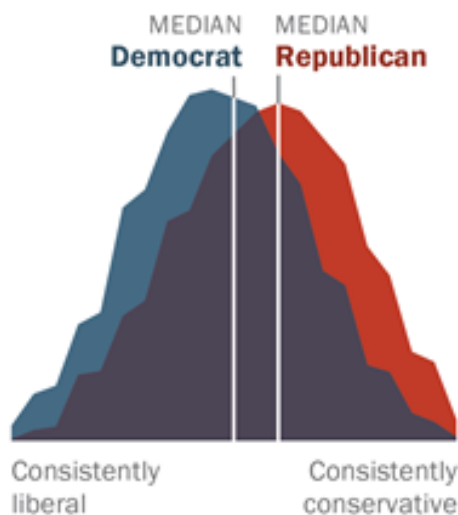### 1994

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal   Consistently conservative

2004

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal   Consistently conservative

2014

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal   Consistently conservative

Among the less engaged

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal   Consistently conservative

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal   Consistently conservative

MEDIAN **Democrat**   MEDIAN **Republican**

Consistently liberal   Consistently conservative
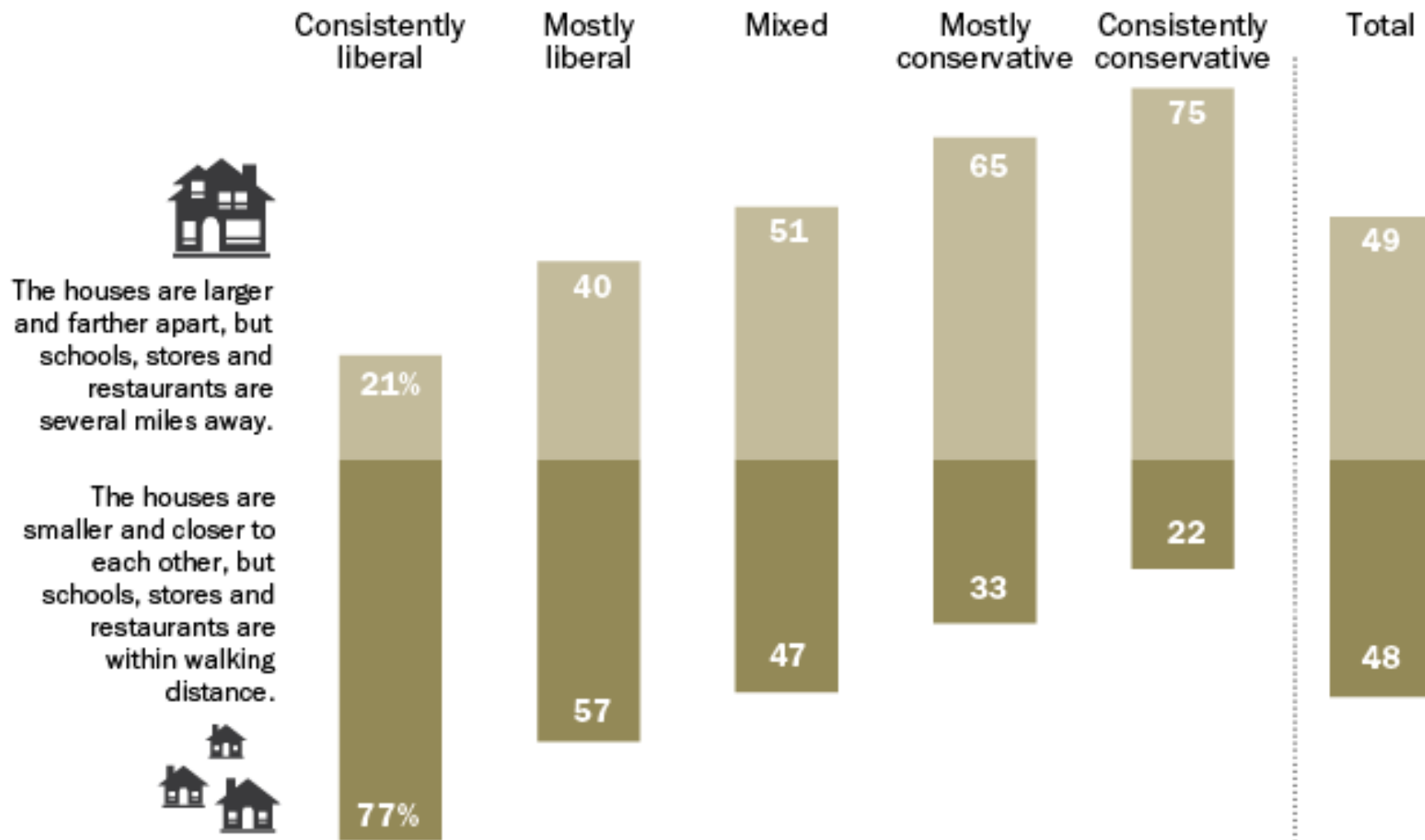
And also growing apart in their personal opinions and preferences

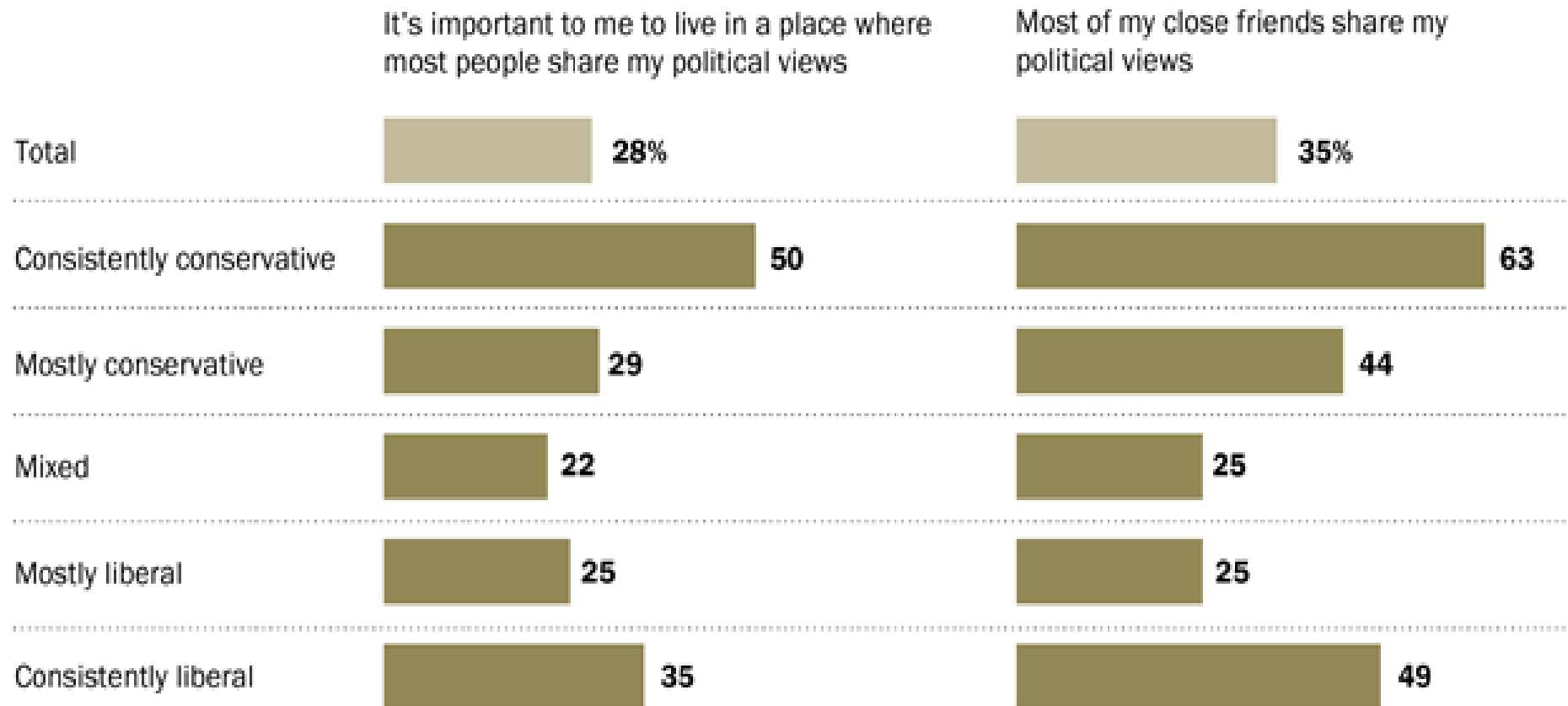*Liberals Want Walkable Communities, Conservatives Prefer More Room*

Would you prefer to live in a community where ...

	Consistently liberal	Mostly liberal	Mixed	Mostly conservative	Consistently conservative	Total
The houses are larger and farther apart, but schools, stores and restaurants are several miles away.	21%	40	51	65	75	49
The houses are smaller and closer to each other, but schools, stores and restaurants are within walking distance.	77%	57	47	33	22	48

People want to live with others who share their political views

	It's important to me to live in a place where most people share my political views	Most of my close friends share my political views
Total	28%	35%
Consistently conservative	50	63
Mostly conservative	29	44
Mixed	22	25
Mostly liberal	25	25
Consistently liberal	35	49

And even see the other side as a threat to the very future of America as we know it

Beyond Dislike: Viewing the Other Party as a 'Threat to the Nation's Well-Being'

Democratic *attitudes about the* **Republican Party**

38% Very unfavorable

27% of Democrats see the Republican Party as a threat to the nation's well-being

16 — 1994
29 — 2004
2014

Republican *attitudes about the* **Democratic Party**

43% Very unfavorable

36% of Republicans see the Democratic Party as a threat to the nation's well-being

17 — 1994
21 — 2004
2014
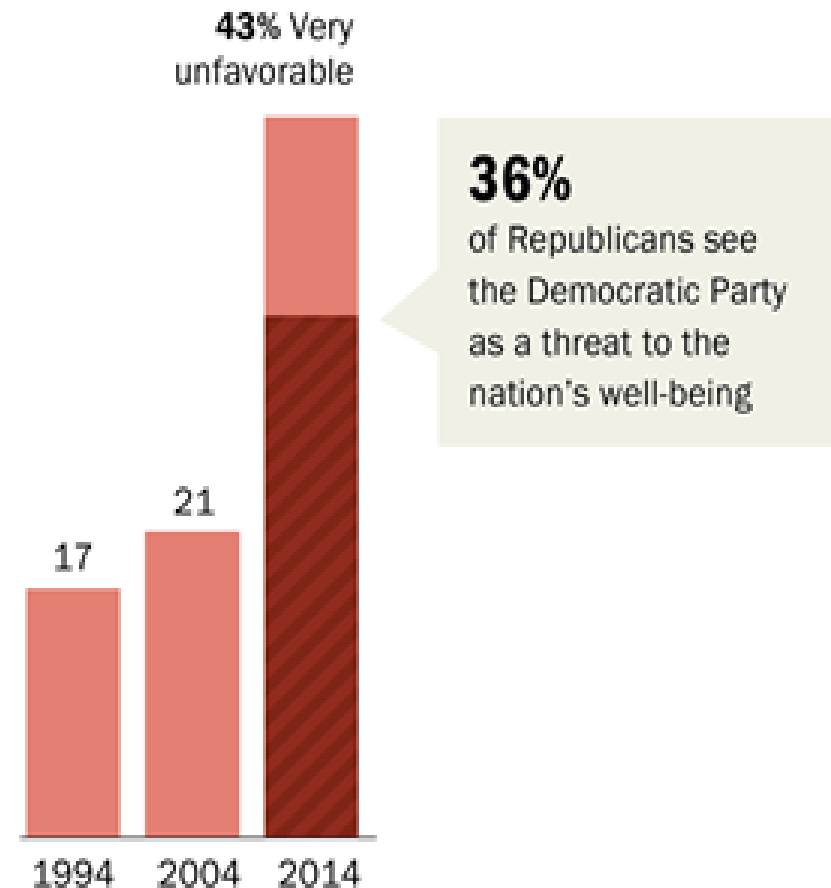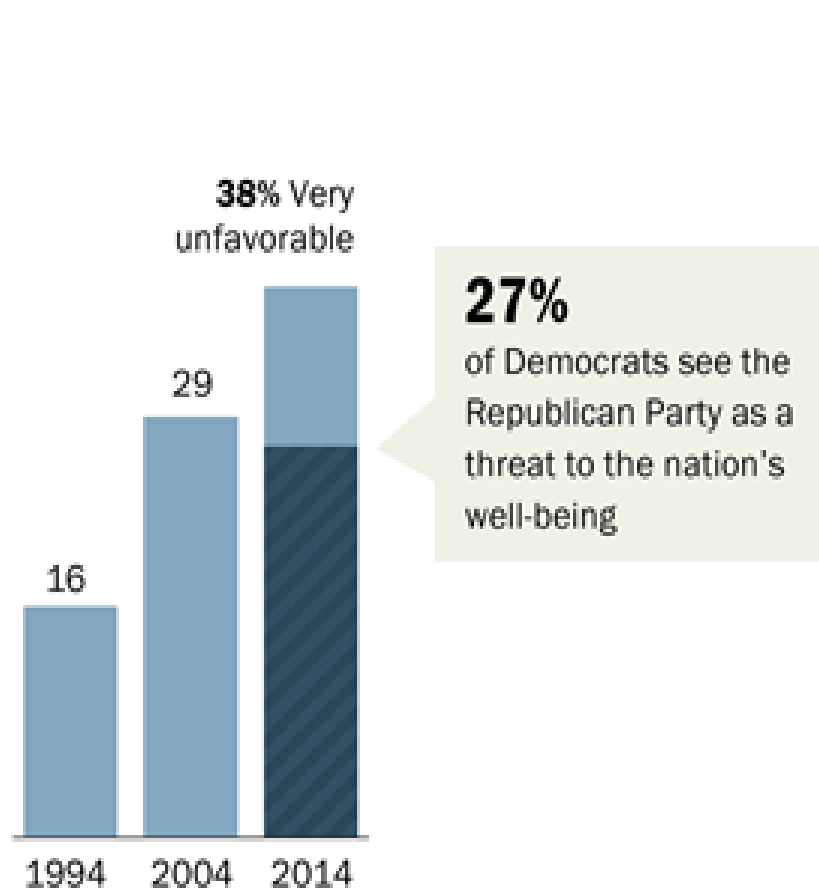
The 'U-Shape' of Political Activism; Higher at Ideological Extremes, Lower in Center

Percent who **always vote**

Percent who contributed to a **political candidate or group** *in the past two years*
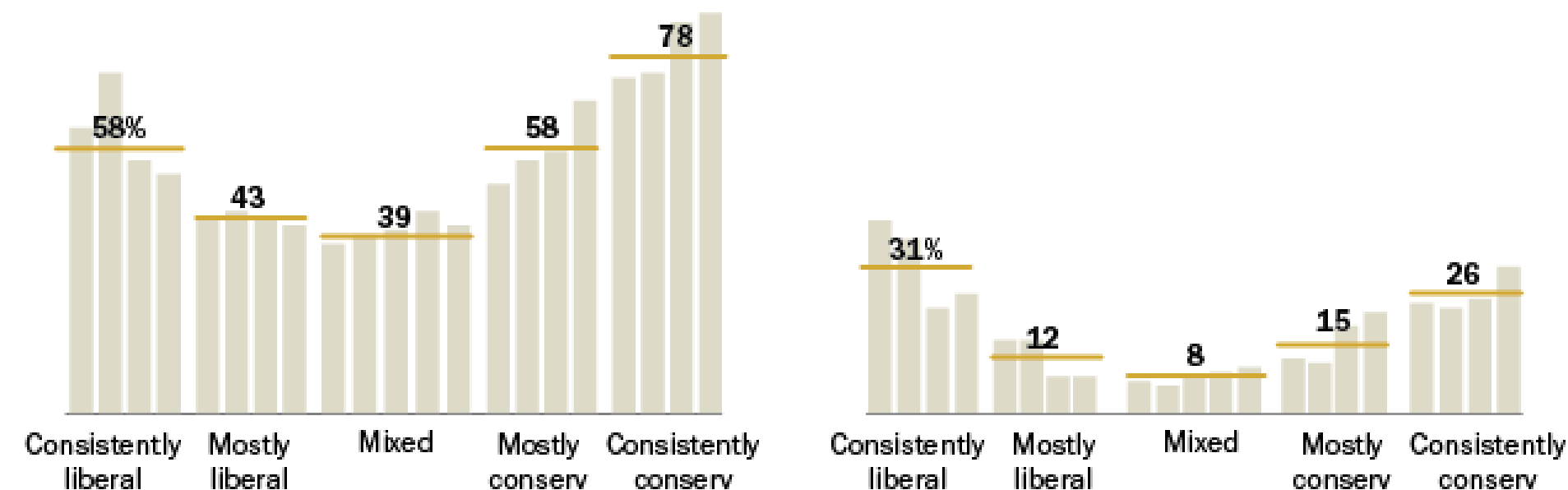
Consistently liberal	Mostly liberal	Mixed	Mostly conserv	Consistently conserv
58%	43	39	58	78

Consistently liberal	Mostly liberal	Mixed	Mostly conserv	Consistently conserv
31%	12	8	15	26

Political Activism on the Left and the Right

In the past two years, percent who have ...

📞 Contacted an elected official

45%
22
19
34
50

Consist-ently Mostly   Mostly Consist-ently

LIBERAL   MIXED   CONSERVATIVE

🎈 Attended a campaign event

25%
14
11
16
24

Consist-ently Mostly   Mostly Consist-ently

LIBERAL   MIXED   CONSERVATIVE

🗳 VOTE Worked or volunteered for a candidate or campaign
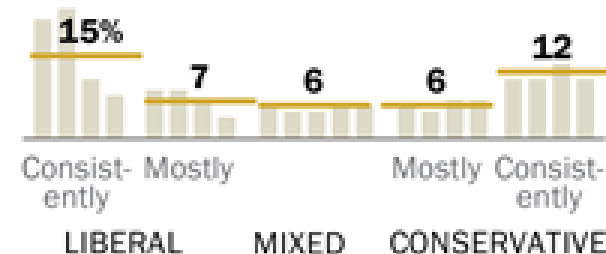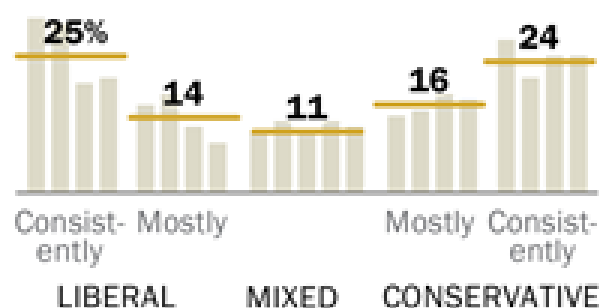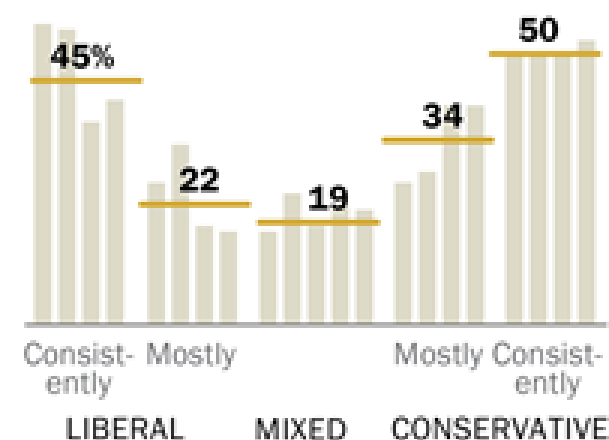
15%
7
6
6
12

Consist-ently Mostly   Mostly Consist-ently

LIBERAL   MIXED   CONSERVATIVE

Two tales of media/social media and politics

Echo chamber

Empty chamber

Echo chambers

Echo chamber in Twitter

Conservatives:
Dominated by references to conservative hashtags such as #tcot and #tlot ... and by commentators such as @DailyCaller, @TheTeaParty_net

Liberals:
Dominated by references to liberal hashtags such as #ows and #P2, ... and by commentators such as @NHLABOR_NEWS and @Politics_PR

Political News Without a Point of View Preferred Across Party Lines

Prefer political news from...

	My point of view	No point of view	DK
	%	%	%
2012	26	64	10=100
2010	25	62	13=100
2008	23	66	11=100
2006	23	68	9=100
2012 among...			
College grad+	18	75	7=100
Some college	23	69	8=100
HS or less	33	53	14=100
Conservative Rep	36	58	6=100
Mod/Lib Rep	20	73	7=100
Independent	20	71	9=100
Cons/Mod Dem	33	58	9=100
Liberal Dem	29	62	8=100

PEW RESEARCH CENTER 2012 News Consumption Survey.
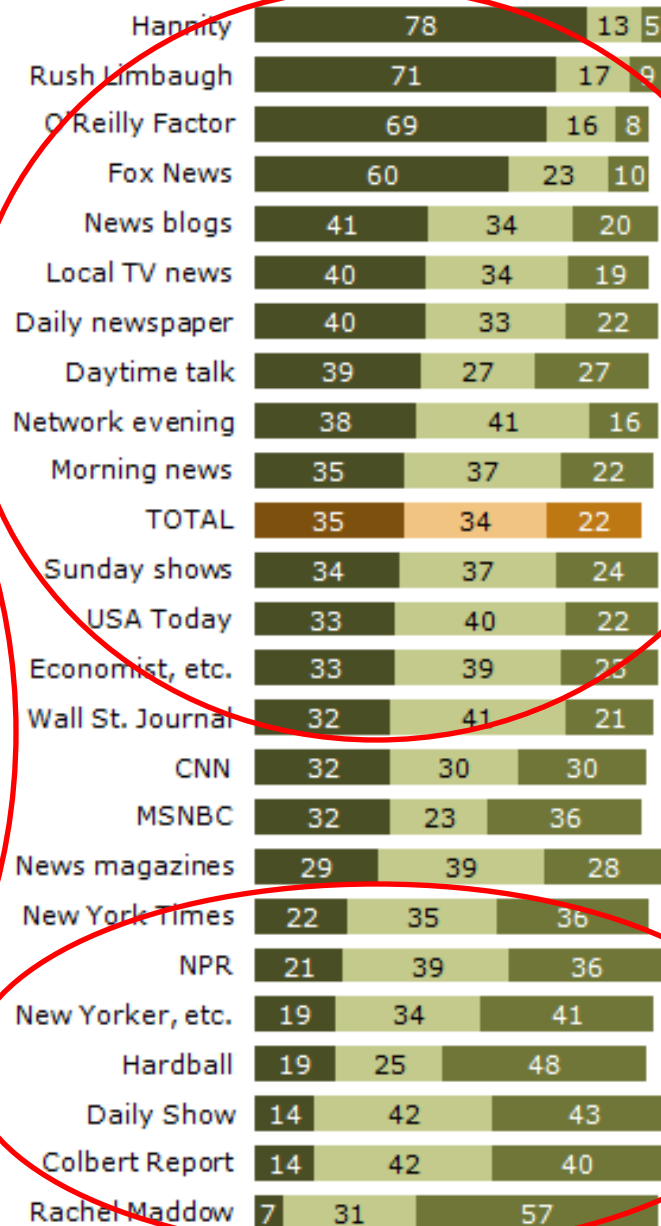Q55. Figures may not add to 100% because of rounding.

Partisanship and Ideology of News Audiences

Partisanship: ■Republican ■Independent ■Democrat

	Republican	Independent	Democrat
Hannity	65	22	5
Rush Limbaugh	63	24	10
O'Reilly Factor	52	30	15
Fox News	40	33	22
News blogs	29	32	35
Local TV news	27	33	34
Daily newspaper	26	34	35
Morning news	25	29	39
TOTAL	24	36	32
Network evening	23	37	36
Economist, etc.	22	44	25
Sunday shows	22	32	44
Daytime talk	21	25	48
Wall St. Journal	20	45	31
USA Today	20	39	40
News magazines	19	37	41
NPR	17	37	43
CNN	16	31	50
MSNBC	16	24	58
New York Times	13	39	44
Colbert Report	12	38	45
Daily Show	10	41	45
New Yorker, etc.	9	32	57
Hardball	7	25	65
Rachel Maddow		20	74

Ideology: ■Conservative ■Moderate ■Liberal

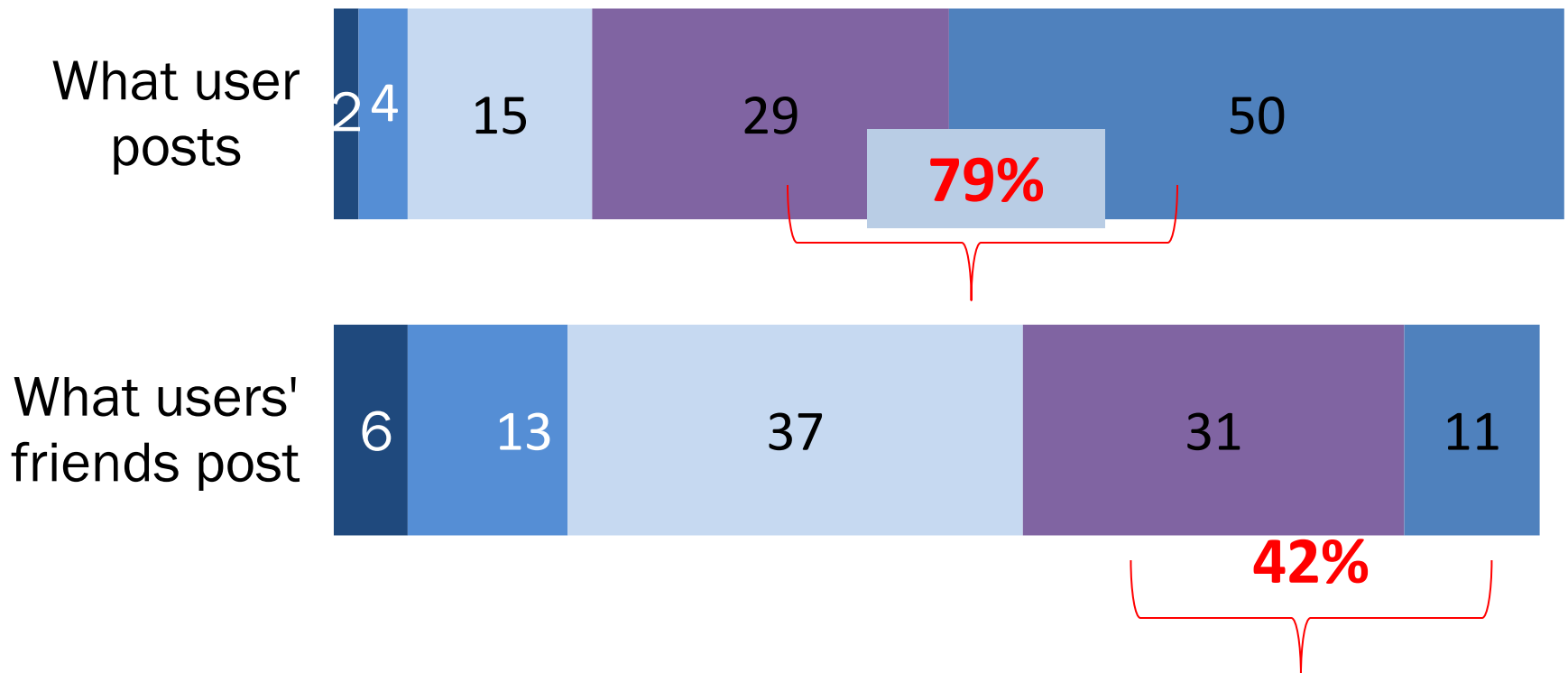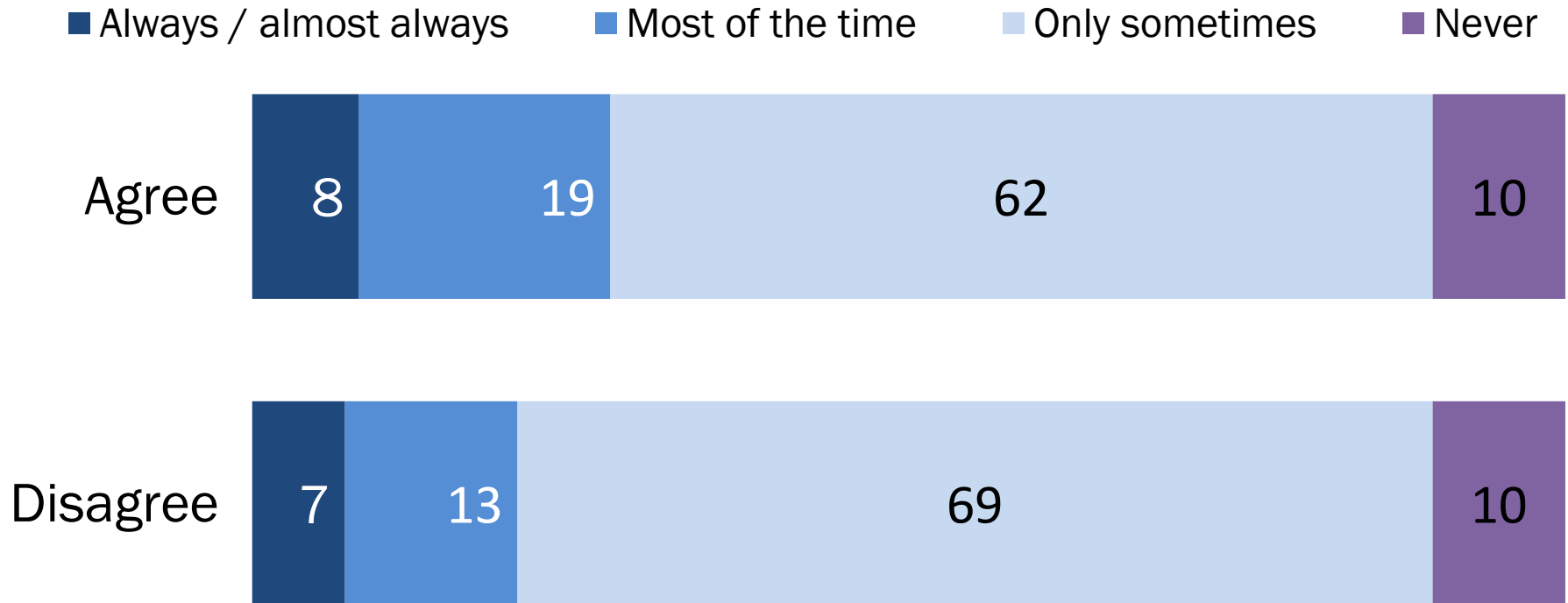|	Conservative	Moderate	Liberal
Hannity	78	13	5
Rush Limbaugh	71	17	9
O'Reilly Factor	69	16	8
Fox News	60	23	10
News blogs	41	34	20
Local TV news	40	34	19
Daily newspaper	40	33	22
Daytime talk	39	27	27
Network evening	38	41	16
Morning news	35	37	22
TOTAL	35	34	22
Sunday shows	34	37	24
USA Today	33	40	22
Economist, etc.	33	39	23
Wall St. Journal	32	41	21
CNN	32	30	30
MSNBC	32	23	36
News magazines	29	39	28
New York Times	22	35	36
NPR	21	39	36
New Yorker, etc.	19	34	41
Hardball	19	25	48
Daily Show	14	42	43
Colbert Report	14	42	40
Rachel Maddow	7	31	57

Emptier chambers in SNS

2012 election – Political content posted by social networking site users

Legend: ■ All / almost all ■ Most ■ Some ■ Just a little ■ None at all

What user posts

| 2 | 4 | 15 | 29 | 50 |

79%

What users' friends post

| 6 | 13 | 37 | 31 | 11 |

42%

How much agreement/disagreement on politics on social networking sites

Legend:
- Always / almost always
- Most of the time
- Only sometimes
- Never

	Always / almost always	Most of the time	Only sometimes	Never
Agree	8	19	62	10
Disagree	7	13	69	10

What do they do when disagreement occurs?

- 71% usually ignore the material

- 23% say they usually respond

- 4% say it depends on the circumstances

22% of social networking site users have blocked/unfriended someone because of their political posts

- 13% of SNS users have blocked, unfriended, or hidden someone on the site because that person posted political material too frequently.

- 13% of SNS users have blocked, unfriended, or hidden someone on the site because that person posted something the user <u>disagreed with or found offensive.</u>

- 10% of SNS users have blocked, unfriended, or hidden someone on the site because that person <u>argued about political issues</u> on the site with the user or another person the user knows.

- 7% of SNS users have blocked, unfriended, or hidden someone on the site because that person <u>posted something related to politics or political issues that offended the user's friends</u> or followers.

- 6% of SNS users have blocked, unfriended, or hidden someone on the site because that person <u>disagreed with something the user posted about politics.</u>

- 57% of SNS users have <u>clicked the "like" button</u> in response to political material posted by someone else.

- 40% have <u>posted a positive comment</u> in response to political material shared by someone else.

- 15% have <u>friended someone</u> because they share the user's political views.

The state of play in social networks: Echo and empty chambers

- 4% of SNS users (2% of adults) are at least somewhat orienting their networks like echo chambers: Added and trimmed networks AND their networks deliver at least some material that matches their POV

22% of SNS users (12% of adults) live in networks where they hear at least some/most political material they agree with

28% of SNS users (14% of adults) have either added or trimmed their network because of political content

44% of SNS users (24% of adults) have very light exchanges over politics

22% of SNS users (12% of adults) are a "captive audience" whose network delivers political material but they don't

9% of SNS users (5% of adults) have no politics going on in their networks

50% have no connection to the SNS world of politics
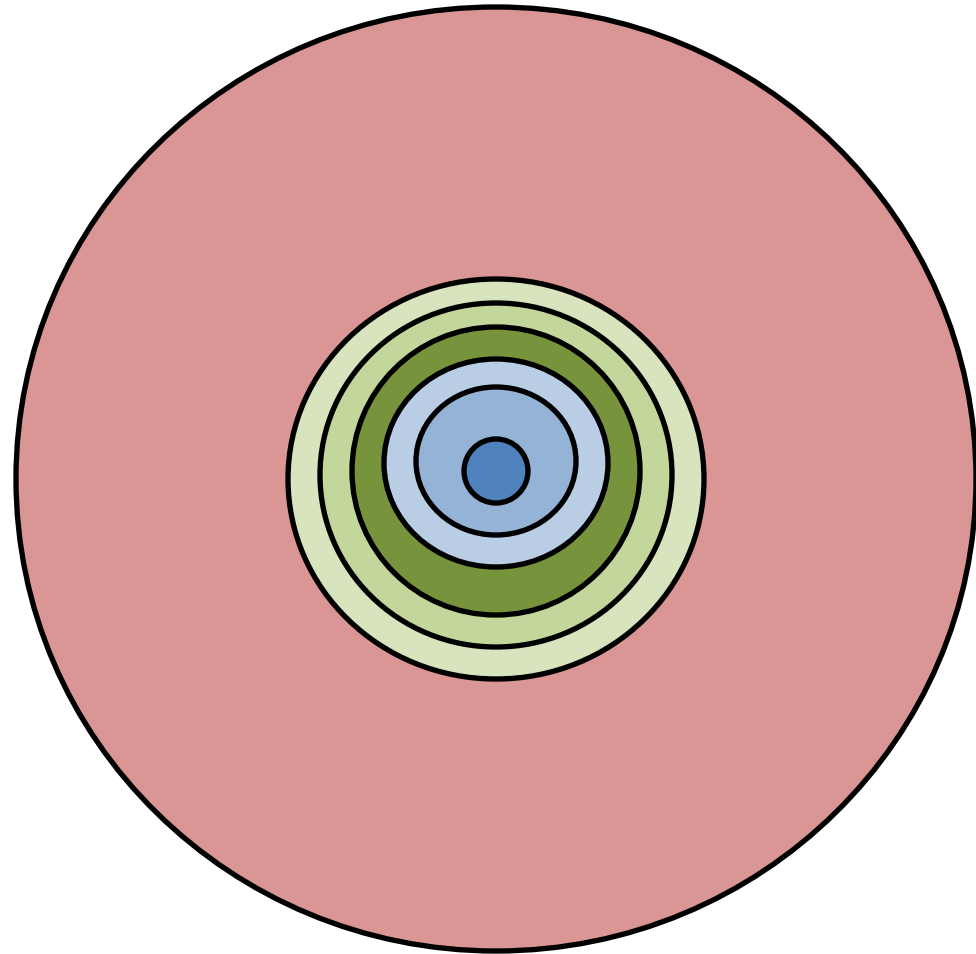
"How do we function in this environment?"

#1: Are you trying to activate the "poles"?

They like you and/or your cause (or possibly hate you and think you're destroying America)

They are probably already talking about you (and if they aren't already, they'd probably like to)

Social media offers a way to find, identify, and reach your "super fans"

They want to be part of the team, help co-create the world with you, and convert their friends—if you let them

#2: Or are you trying to rouse the middle?

Don't engage consistently with politics

They probably don't really know or care very much about your particular issue

Their tolerance threshold is probably fairly low...

But they can be encouraged to learn/act/change!

Sometimes that happens because of big events that grab their attention—but many times it's at the behest of someone from the previous group

#3: Think about your audience/community

People use digital platforms for two reasons:

1) Their friends are there

2) The content they like is there

When planning an outreach strategy, consider:

1) Where does my audience "live"?

2) Is my content relevant for this platform?

Three technology revolutions have reshaped personal and civic life and a fourth is underway
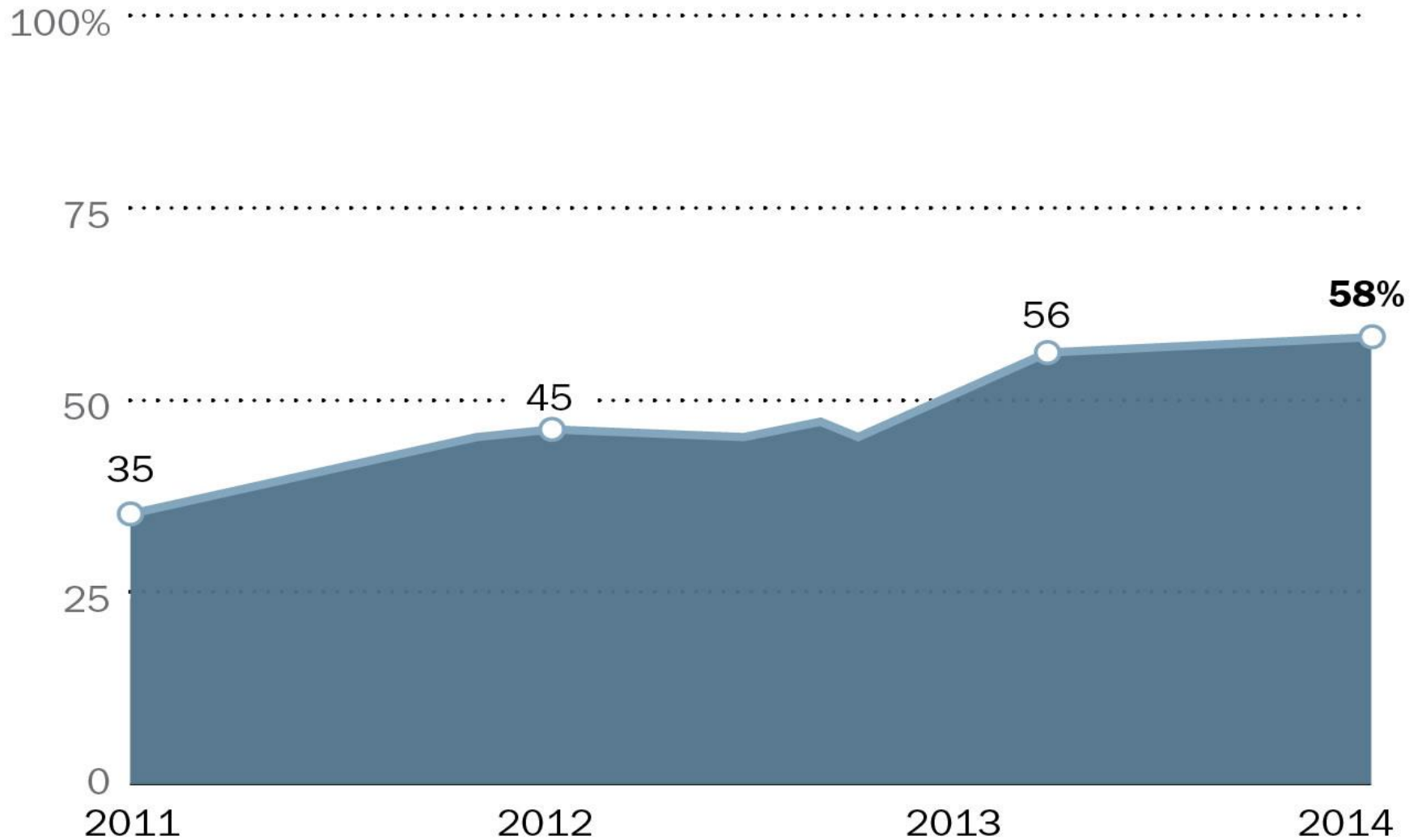
First: Internet
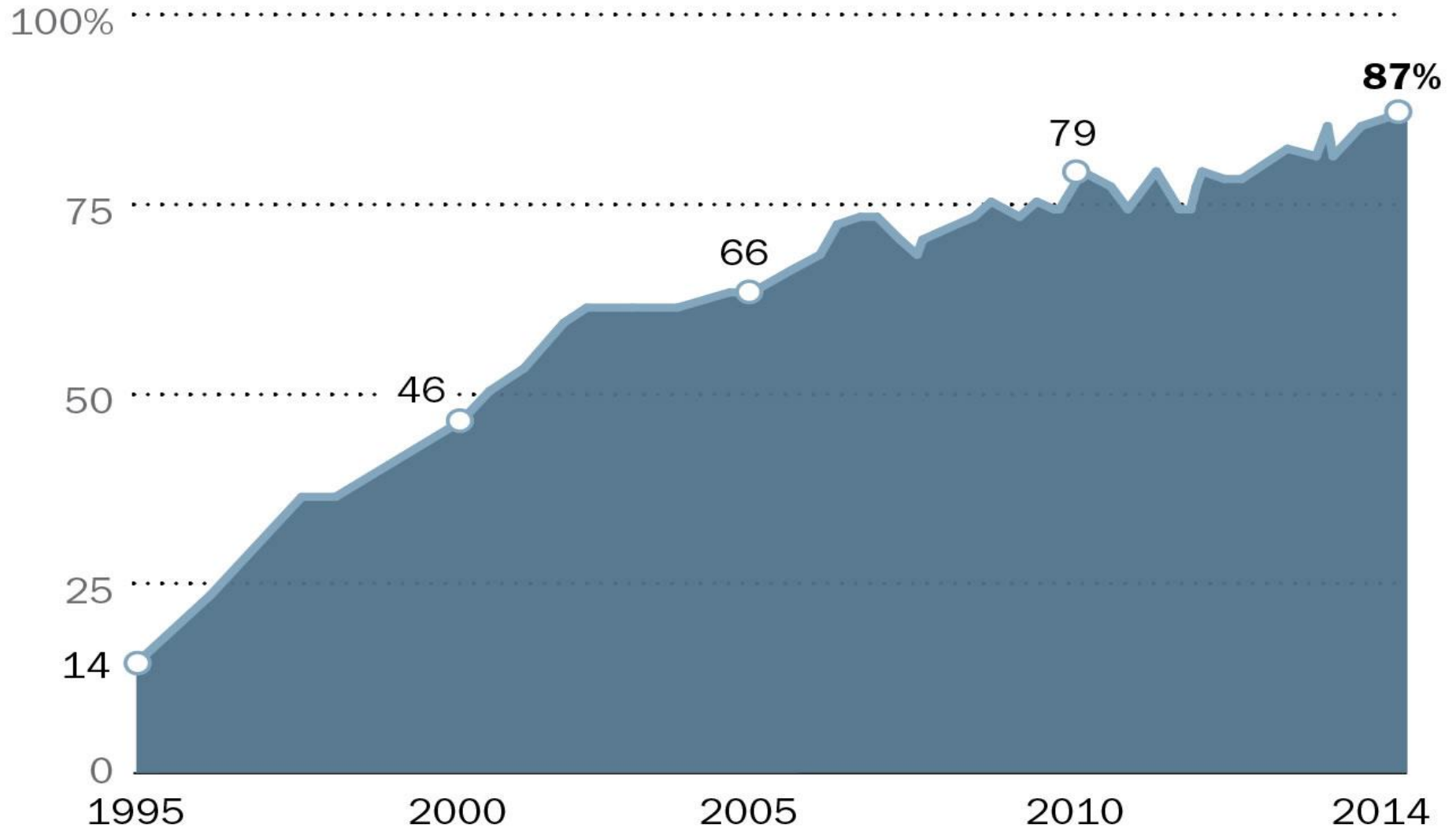
First: Broadband
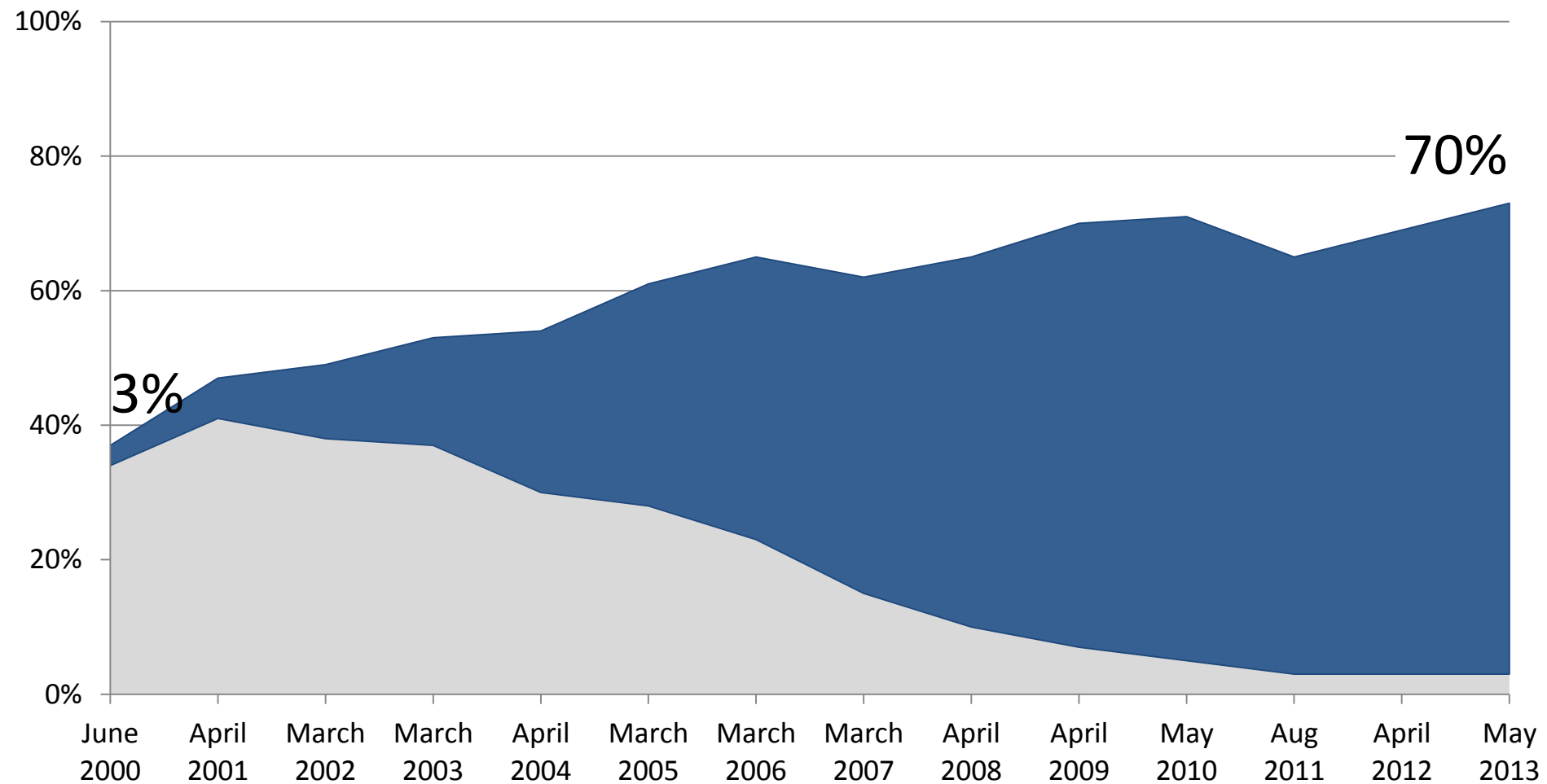
Second: Mobile connectivity – Cell phones
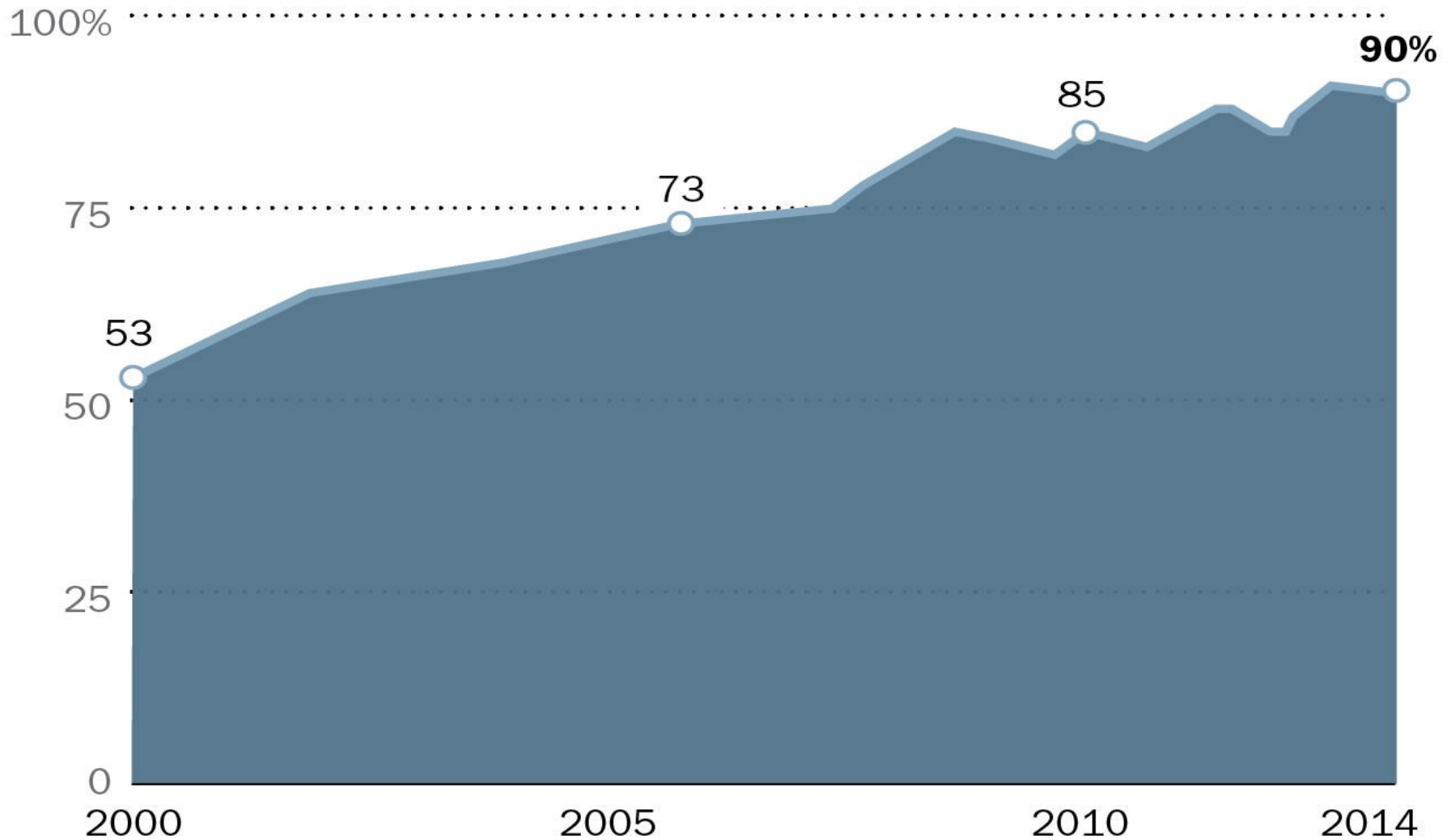
Second: Mobile connectivity - Smartphones

Second: Mobile connectivity – Tablets
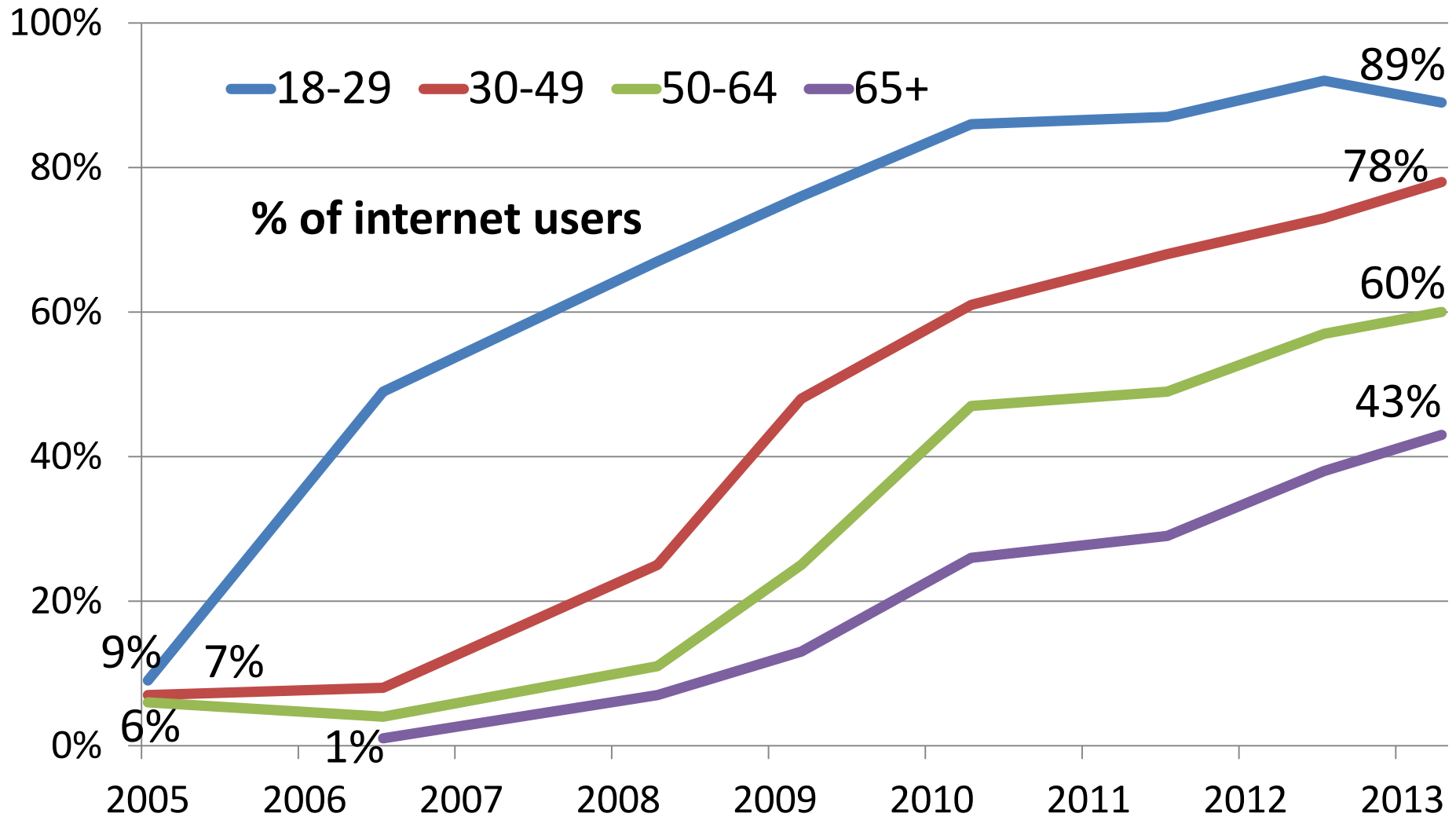

Have either one — 50%

Tablet owners — 42%

E-reader owners — 32%

http://bit.ly/OiOIFM
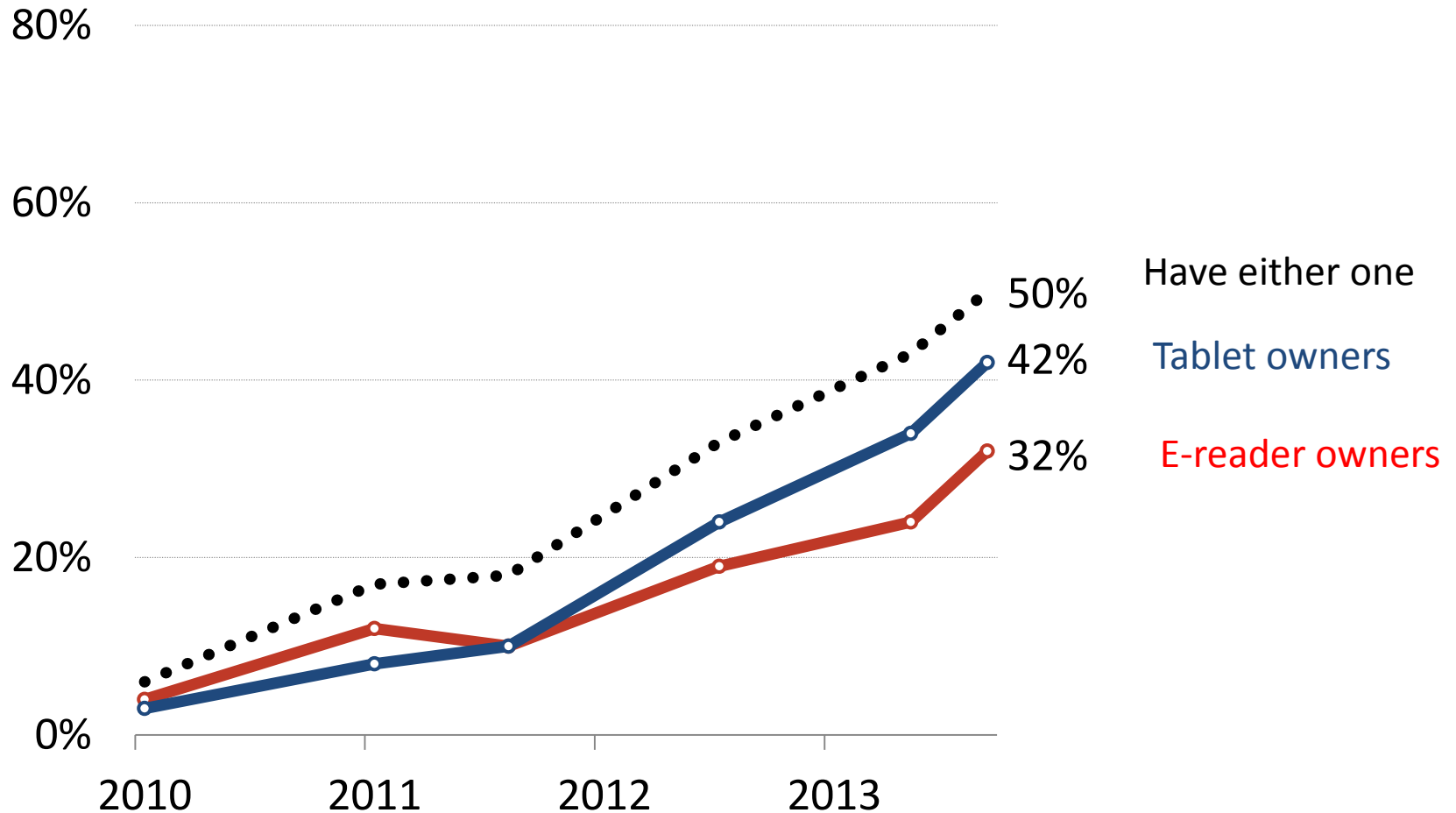
Third: Social networking/media

61% of all adults

The Landscape of Social Media Users (among adults)

	% of internet users who….	The service is especially appealing to
Use Any Social Networking Site	**73%**	**Adults ages 18-29, women**
Use Facebook	71%	Women, adults ages 18-29
Use Google+	31%	Higher educated
LinkedIn	22%	Adults ages 30-64, higher income, higher educated
Use Pinterest	21%	Women, adults under 50, whites, those with some college education
Use Twitter	18%	Adults ages 18-29, African-Americans, urban residents
Use Instagram	17%	Adults ages 18-29, African-Americans, Latinos, women, urban residents
Use Tumblr	6%	Adults ages 18-29
reddit	6%	Men ages 18-29

Internet of Things

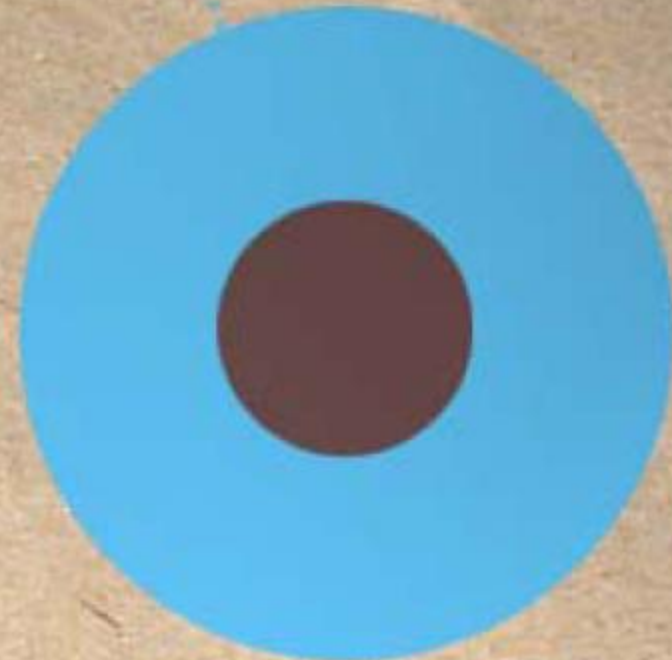During 2008, the number of things connected to the Internet exceeded the number of people on earth.
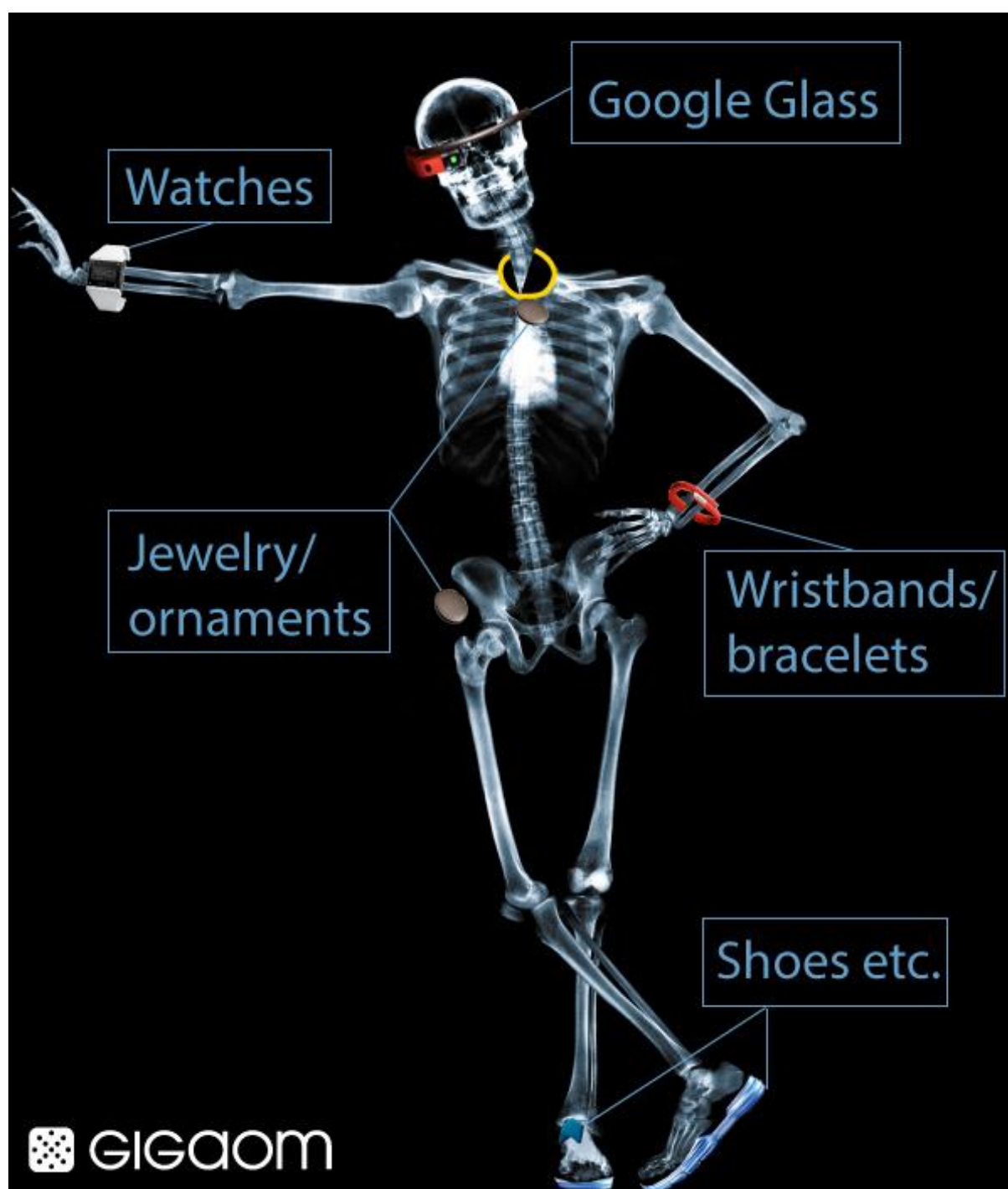
2003

2010

2015

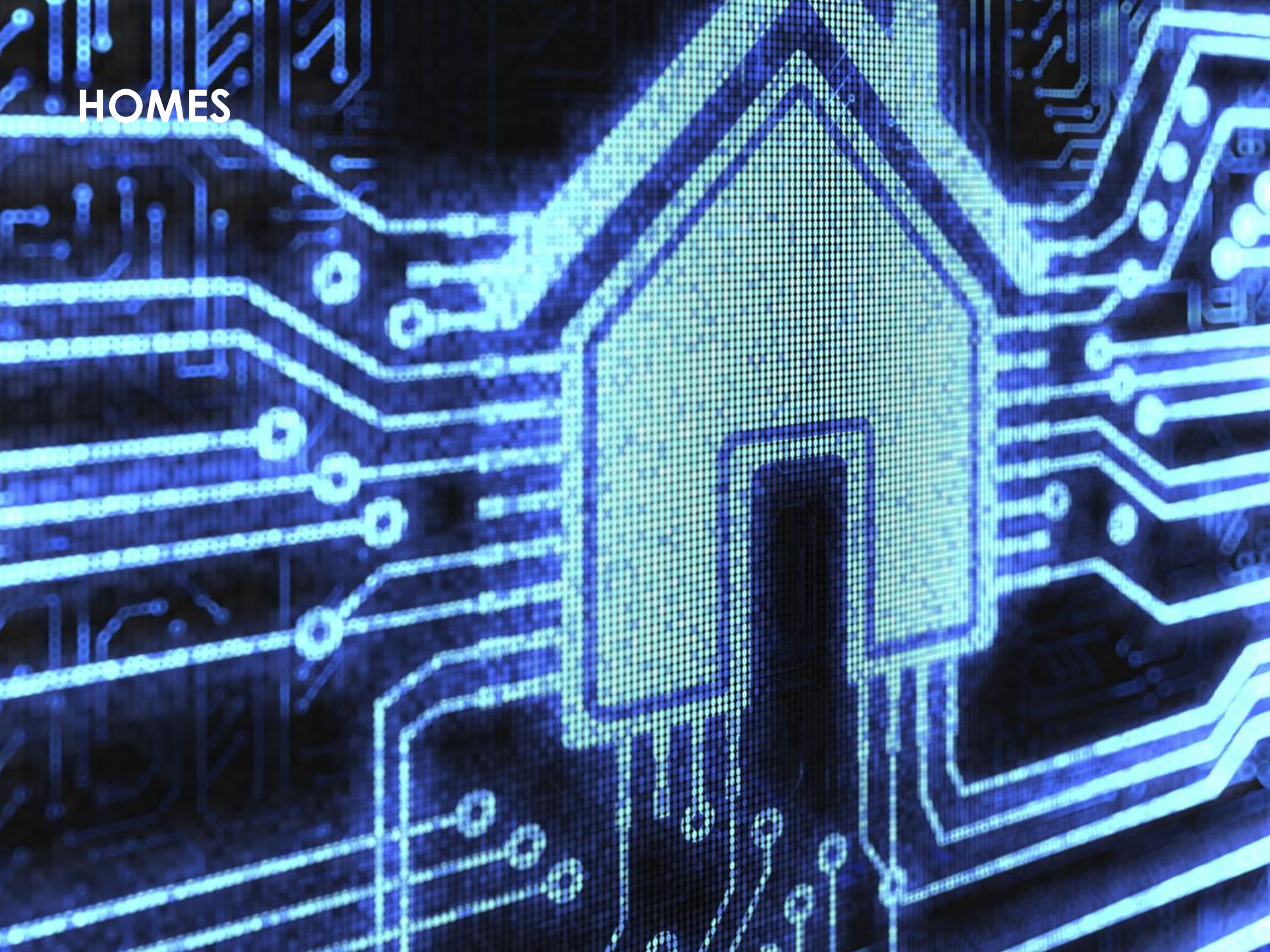By 2020 there will be 50 billion.
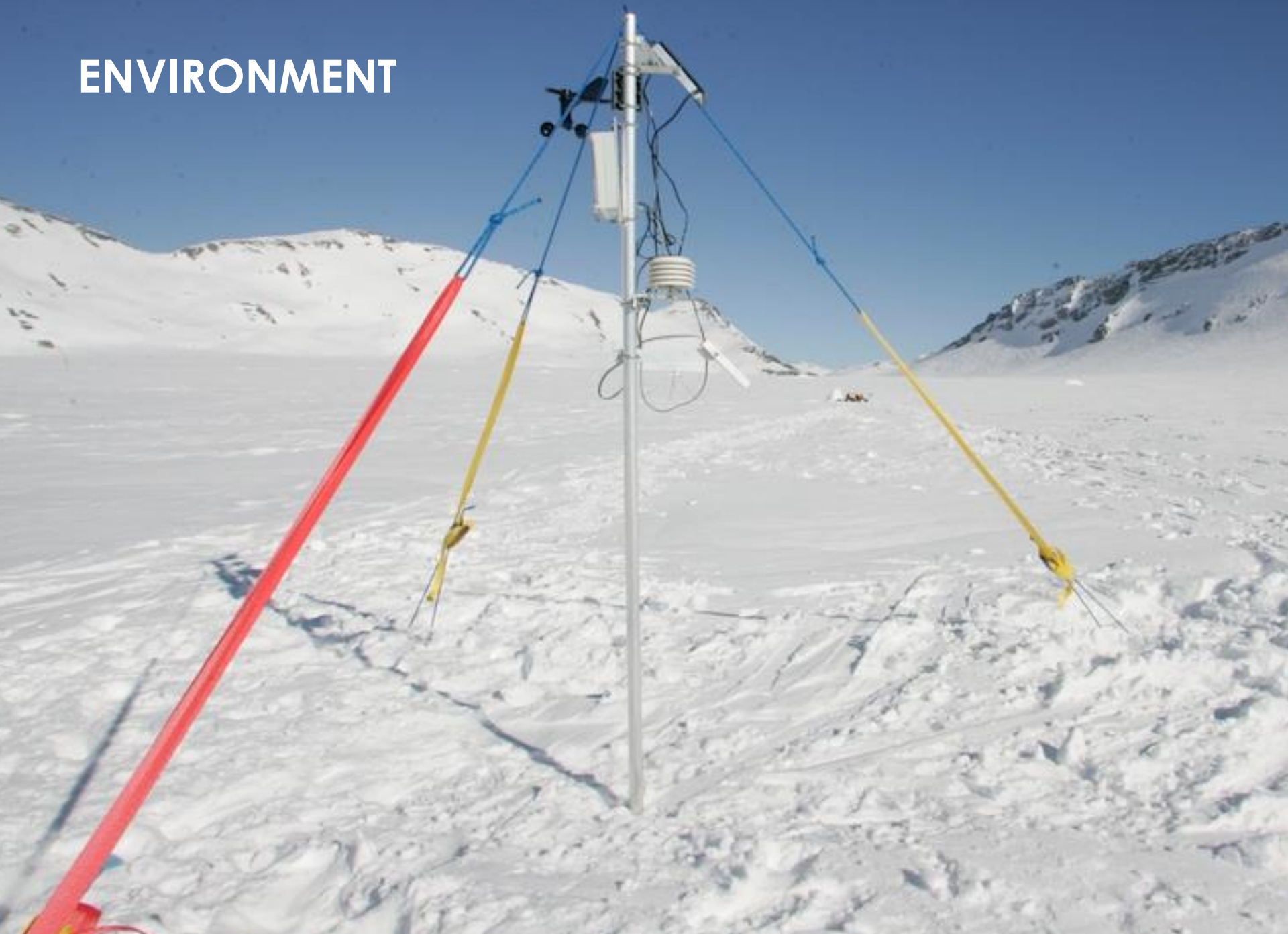
Source: Cisco

BODY

HOMES

COMMUNITIES
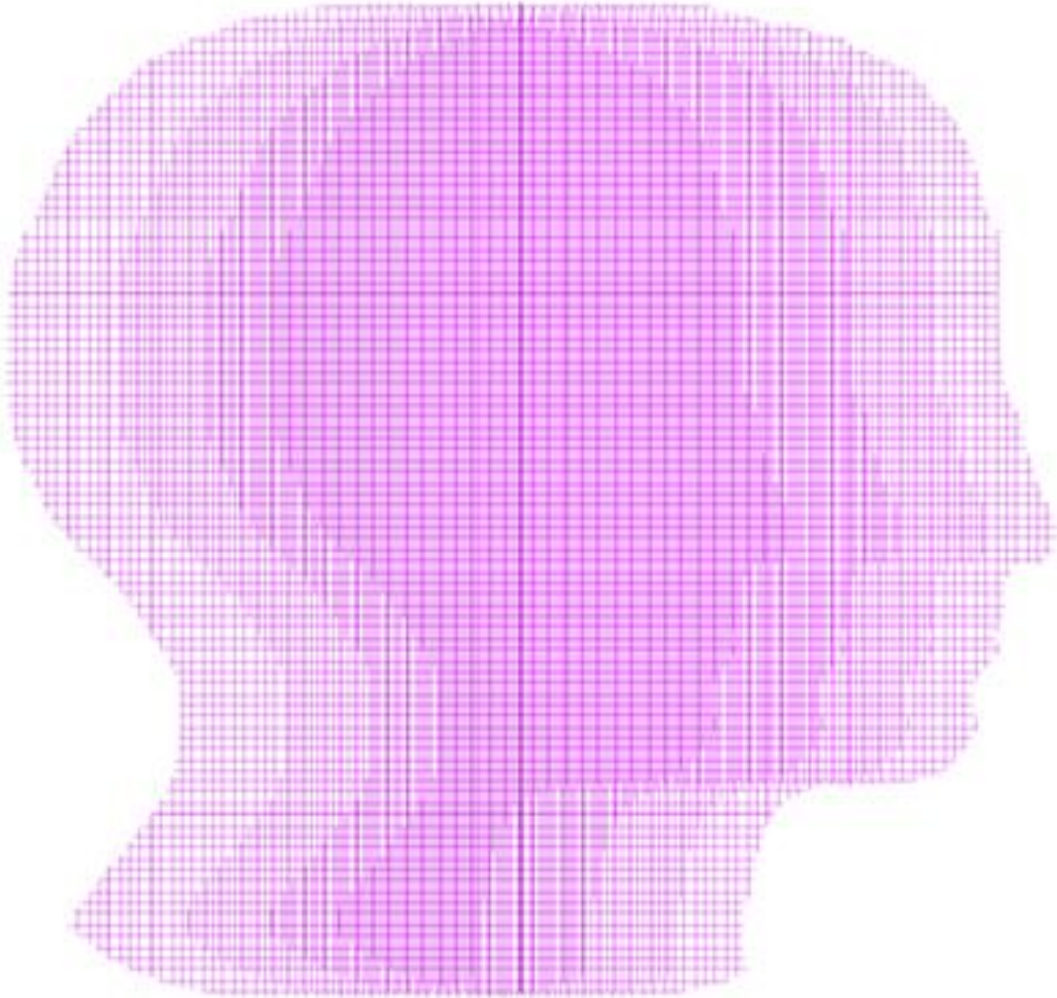
ENVIRONMENT

Impacts on citizens

Information is a 'third skin'

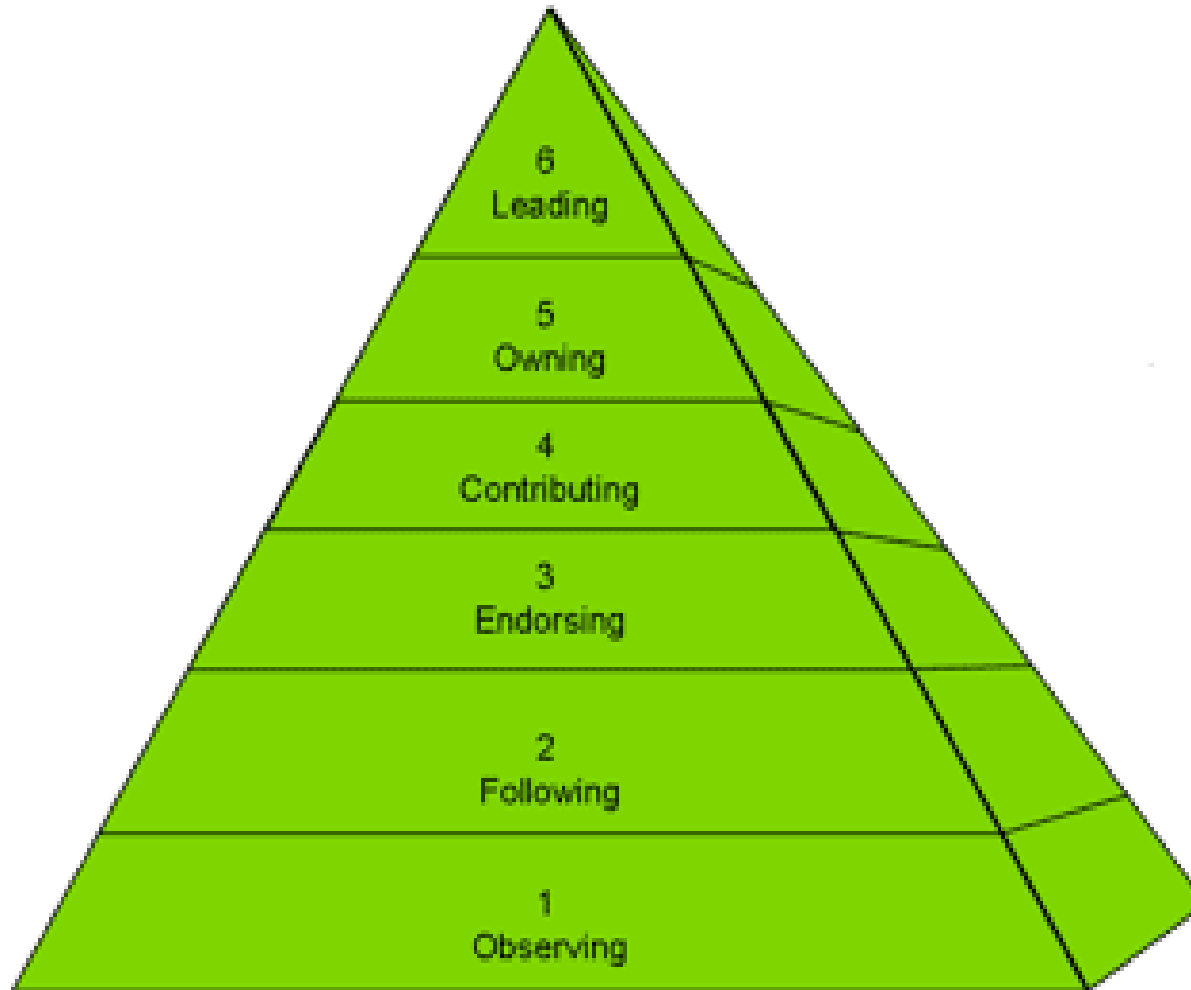# People have a new attention layer – 'continuous, partial'

People have a fifth lobe

People participate in the 'fifth estate'

Your goal: Move people from one level of engagement to the next highest one

6
Leading

5
Owning

4
Contributing

3
Endorsing

2
Following

1
Observing

Media-Attention Zones

1) STACKS

How it works

- **<u>Motive</u>** – learning, mastery, productivity
- **<u>Content</u>** – actionable info, how-to sensibility, links and other resources
- **<u>Demographics</u>** – tilts GenX, men, knowledge workers
- **<u>Device</u>** – desktop / laptop
- **<u>Engagement</u>** – full attention – vertical reading
- **<u>Influentials</u>** – trusted brands and known experts (professional and amateur)
- **<u>~ Mindshare</u>** – quarter to a third of media time

Implication for media and activists

- **<u>Engagement strategy</u>**
    - Search optimized / findable
    - Acting as information Sherpas
    - Problem solving mindset
    - Easy cut and paste
    - FAQs
    - How-to videos
   - Feedback friendly

2) SIGNALS

How it works

- **<u>Motive</u>** – real-time awareness
- **<u>Content</u>** – headlines, new information, first impressions matter most
- **<u>Demographics</u>** – under 30, tilts women
- **<u>Device</u>** – smartphone, tablet
- **<u>Engagement</u>** – glancing OR galvanized
- **<u>Influentials</u>** – brands
- **<u>~ Mindshare</u>** – < 5% of media time

Implication for media and activists

- **<u>Engagement strategy</u>**
  - News, especially scoops
  - Deals
  - Location enabled
  - Insights from analytics

3) SNACKS
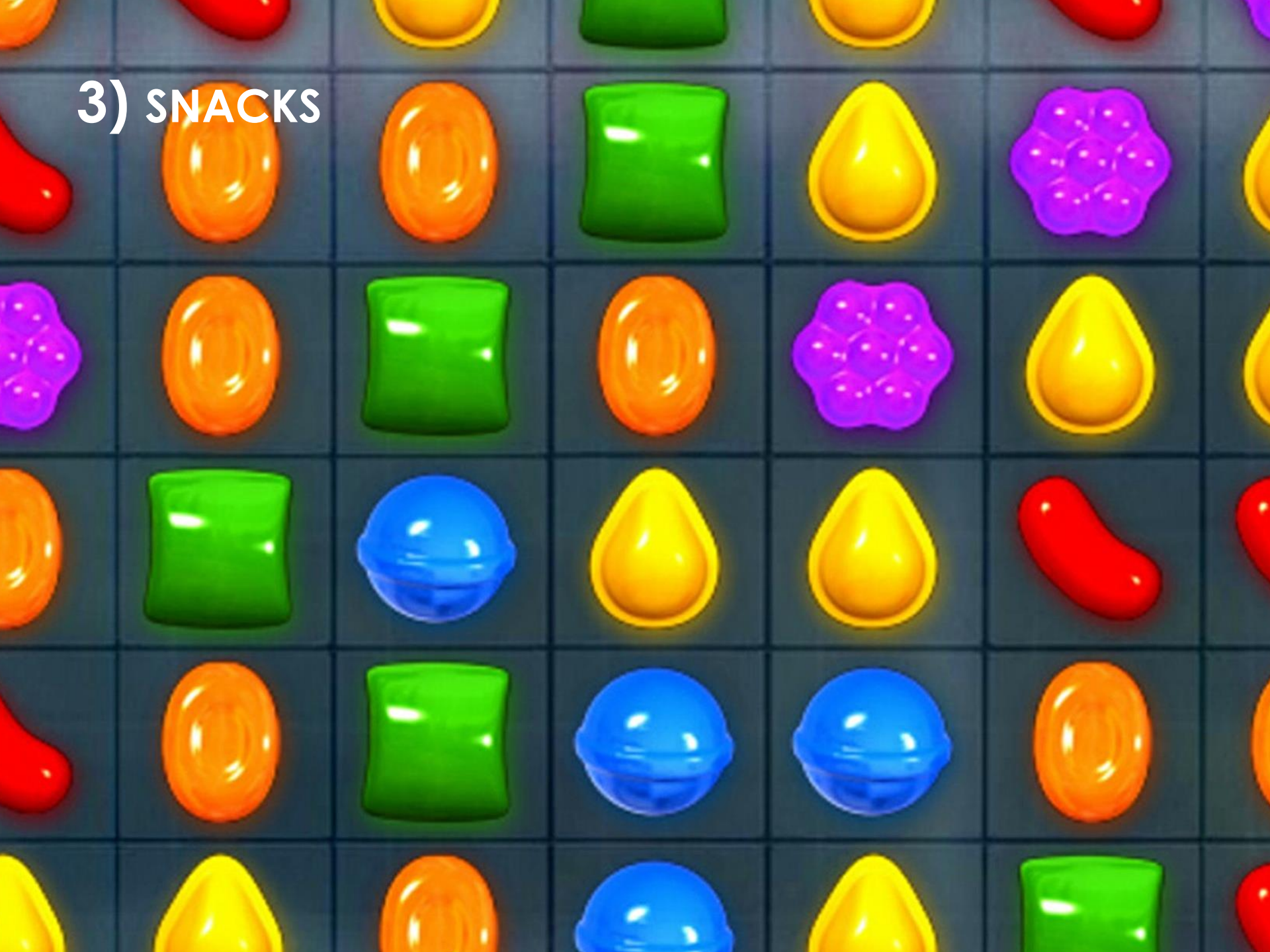
How it works

- **<u>Motive</u>** – killing time, beating boredom
- **<u>Content</u>** – gamified, bite-size headlines, link-dense
- **<u>Demographics</u>** – Everyone gets something different
- **<u>Device</u>** – smartphone
- **<u>Engagement</u>** – distracted, quick-twitch
- **<u>Influentials</u>** – brands, quality of social network
- **<u>~ Mindshare</u>** – 5%-10% of media time

Implication for media and activists

- **<u>Engagement strategy</u>**
  - Apps
  - Immediate connection
  - Predictable and compelling home screen
  - Grabby copy / activity
  - Clear and consistent Return on My Attention

4) STREAMS

How it works

- **<u>Motive</u>** – catching up / checking in / curiosity
- **<u>Content</u>** – news (broad definition), social updates
- **<u>Demographics</u>** – tilts under 35 / female
- **<u>Device</u>** – any / all
- **<u>Engagement</u>** – continuous partial attention / horizontal scans / sharing
- **<u>Influentials</u>** – editors, social networks
- **<u>~ Mindshare</u>** – quarter to a third of media time

Implication for media and activists

- **<u>Engagement strategy</u>**
  - Apps
  - Smart curation
  - Customizable filters
  - Compelling ecosystem of content
  - Tagging and saving for future immersion
  - Social network mediated
 - Serendipity encounters

5) SOCIALS

How it works

- **<u>Motive</u>** – friend grooming
- **<u>Content</u>** – social, personal, entertaining
- **<u>Demographics</u>** – under 35, tilts female
- **<u>Device</u>** – all
- **<u>Engagement</u>** – partial, browsing
- **<u>Influentials</u>** – super-networkers / primary nodes in the network
- **<u>~ Mindshare</u>** – 10% of media time

Implication for media and activists

- **<u>Engagement strategy</u>**
  - Social networks are gatekeepers
  - Spreadable content
  - Treat central network nodes like traditional media influences
  - Enable participation and feedback

5) Synthesized spaces
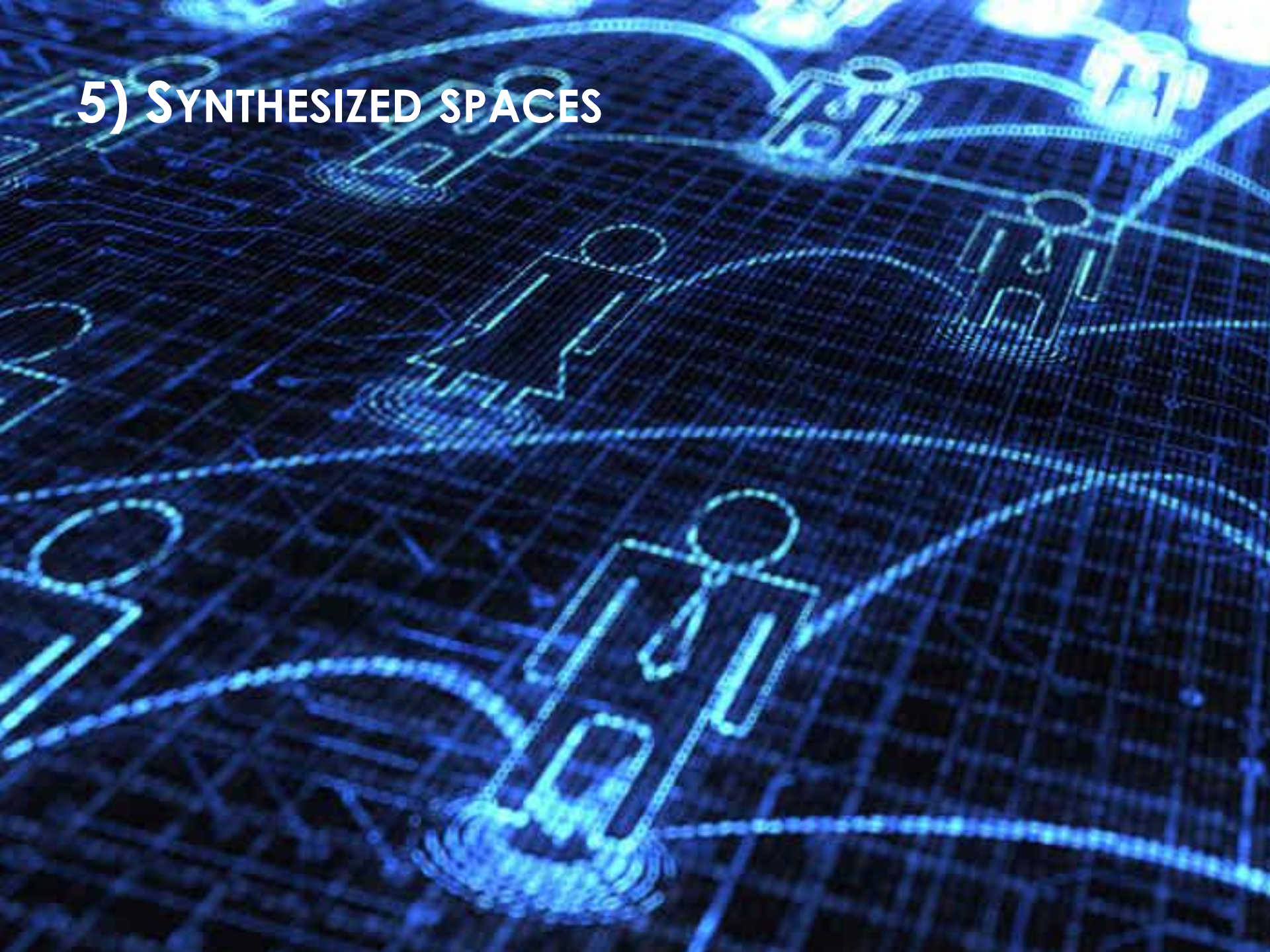
How it works

- **<u>Motive</u>** – my permissions
- **<u>Content</u>** – personalized, anticipatory
- **<u>Demographics</u>** – upscale, well-educated, middle aged
- **<u>Device</u>** – my surroundings
- **<u>Engagement</u>** – immersive, invisible
- **<u>Influentials</u>** – my past behavior, analytics, algorithms
- **<u>~ Mindshare</u>** – most waking hours

Implication for media and activists

- **<u>Engagement strategy</u>**
  - Selective product placement and messaging
  - Permission-based monitoring / interactions
  - Careful of privacy sensitivities
  - Careful of too much "monetization"

Your optimum moments

- When you are making news
- When you can add to news-driven conversations
- When your "close up" unexpectedly comes
- When your evangelists work their networks
- When you can recruit unexpected allies
- When someone on the "other side" embraces you

Civic life is networked life with network information created and shared by networked individuals and networked organizations

Lee Rainie

Director

Pew Research Center's Internet Project

lrainie@pewresearch.org

@lrainie
@pewinternet
@pewresearch