Objects in Mirror Are Closer Than They Appear:

Change is Accelerating in the Political Landscape

E-Voter Institute 2007 Research Findings
September 2007

Research Partner: HCD Research

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**Objects in Mirror Are Closer Than They Appear:
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E-Voter Institute and partners set out to explore the growing use of the Internet for political campaigns. We see the number of Internet based tools exploding for the use of persuasion, fund raising and getting out the vote. Are the political consultants able to keep up with the rapid changes? Have voters continued to pull ahead of the consultants in their understanding of the impact an Internet component of a campaign can have? If online tools are effective for reaching the loyal base, why aren't more funds spent for Internet related activities?

Politics has always been a local game with word of mouth a powerful tool for promoting a candidate or spreading negative information about an opponent. The viral buzz factor determines how quickly a message spreads. The explosion of online social networks and social media tools has increased the ability of people to get beyond the geo-centric limitations of their neighborhoods. This is the first presidential campaign where user generated content and online social media are elements to be acknowledged and harnessed.

It is our hope that the findings in this document give candidates, advocates, the political advisors, fund raisers, and media strategists a more balanced sense of where to spend their time and money to best reach and persuade voters and win elections. For those in the academic field, our interest is in raising questions that might stimulate further explorations into how political campaigns are evolving in the early 21st Century.

The partners in this research were HCD Research, Brickfish, and The Politico. Other organizations supporting the 2007 research included:

- CompleteCampaigns.com
- Institute for Politics Democracy and the Internet at GWU
- PoliticsOnline.com
- SignOnSanDiego.com
- Techpresident.com (blog ad was purchased)

E-Voter Institute, founded in 1999, is a trade association whose mission is to help accelerate the use of the Internet for politics and advocacy in order to promote a more robust democracy. What follows are findings from the E-Voter Institute's 6th Annual Survey of Political and Advocacy Communication Leaders and the 2nd Annual Survey of Voter Expectations.

Previous research is available from e-voterinstitute.com and in the book, **Crossing the River: The Coming of Age of the Internet in Politics and Advocacy**, Karen A.B. Jagoda, editor, (Xlibris 2005) available from online sources and in bookstores.

EXECUTIVE SUMMARY OF FINDINGS

1. **Online social networking sites are good for creating buzz and spreading a message but not necessarily effective stimulants for traditional political activism.**

2. **Internet tools are seen as very effective by political consultants for reaching liberal activists, while more conventional campaign methods are still seen as the most effective means for reaching social conservatives.**

3. **Consultants continue to underestimate the impact of Internet tools for effectively reaching constituents.**

4. **Reaching the Loyal Base online is becoming more popular across all parties.**

5. **Voter respondents prefer television ads as a method of outreach from candidates, but there is significant demand for online campaigning.**

6. **Consultants consider Internet tools a poor choice for reaching Latino/Hispanic communities.**

7. **Single Women are seen as active users of online social media tools.**

8. **Over 70% of consultants still have serious hesitations about using Internet tools in campaigns.**

9. **Constituents are more likely to forward a message about a candidate or cause than they are to act on it themselves.**

10. **People who are online show a strong intent to vote and are very likely to seek political information online.**
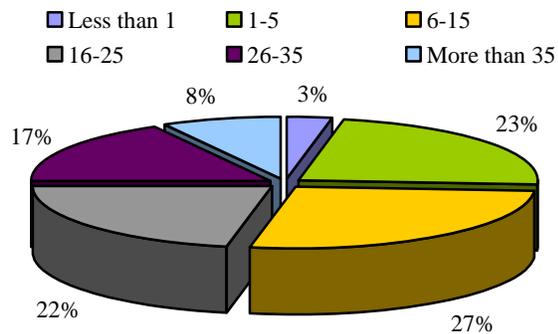
METHODOLOGY

Sixth Annual Survey of Political and Advocacy Communication Leaders

As in past years, participating organizations ran online ad banners and text links on their websites to attract respondents for the **Sixth Annual Survey of Political and Advocacy Communication Leaders**. In addition, emails were sent to membership lists, client lists, and newsletter recipients to request participation in the survey. The survey ran from June 12, 2007 to July 27, 2007. A total sample size of 230 consultants was obtained.

% of consultants who work for the following organizations	
Democratic candidates	51%
Republican candidates	34%
Independent candidates	19%
PACs or Trade Associations	31%
527 Committees	24%
Unions	19%
For-Profit businesses	26%
Not-For-Profit organizations	46%
Organizations outside the U.S.	10%
Other (Please Specify)	10%

% of consultants with years experience in politics or public affairs	
Less than 1	3%
1-5	23%
6-15	27%
16-25	22%
26-35	17%
More than 35	8%

Second Annual Survey of Voter Expectations

To recruit respondents for the **Second Annual Survey of Voter Expectations**, participating organization ran online ad banners and text links on their websites to attract respondents. Additionally, emails were sent to membership lists and client lists. The survey ran from June 8, 2007 to July 23, 2007, and a total of 1609 respondents took the survey. Specific details about the respondents are included in the following text.

HCD Research Methodology and Sampling

HCD Research using their HCD Surveys Panel recruited the majority of respondents for the Survey of Voter Expectations. Respondents to the surveys were invited by HCD to participate via email and participation was completely voluntary

E-Voter Institute supplied an opt-in list that HCD used to invite people to respond to the Survey of Political and Advocacy Communication Leaders.

Respondents to the voter survey were randomly selected from a panel of over 250,000 people who have opted-in and agreed to participate in research. Potential panelists were selected via a random sample obtained through postal mailings directed to individuals on voter registration lists and registrants from websites representing lifestyle, politics, and news organizations. HCD adheres to the highest panel recruitment and management standards. Members are enrolled using online recruitment methods, exclusively using permission-based techniques.

None of the respondents were paid for their participation in either survey.

FINDINGS

1. Online social networking sites are good for creating buzz and spreading a message but not necessarily effective stimulants for traditional political activism.

Social networking sites are an emerging medium for sparking buzz about campaigns, but they are not yet a successful medium for encouraging traditionally defined political activism. Activism is defined here as having done at least one of the following: 1) Signed up for a candidate newsletter, 2) Signed up to receive notices from politically active organizations, 3) Sent email to friends or family about politics, 4) Contributed to a candidate or cause online, 5) Sent an email to a candidate or politician about your concerns, 6) Attended a meeting or rally for a candidate as a result of an email or online notice, 7) Told a friend about a candidate as a result of an email or online notice, 8) Voted as a result of an email or online notice.

Using this definition, members of any online social networking sites are significantly more likely to be active in politics than non-members.

- **86% of online social networking site members reported doing something politically active**
- **77% of nonmembers of online social networking sites have been politically active**

Looking specifically at really active people who at least signed up to receive online notices about politically active organizations, contributed to a candidate or cause online, or attended a meeting or rally for a candidate as a result of an email or online notice, reveals some significant differences:

- **41% of members of online social networks were politically active**
- **31% of non-members were politically active**

Almost half of all respondents are open to hearing about candidates via "word of mouth," but online social networking site members do not seem to take advantage of that medium to learn about candidates. Half of the online social network members reported telling friends about online notices compared to one in three non-members. Members of these sites are more prone to respond to email or online notices about politics than nonmembers.

Has an e-mail or other online notice ever caused you to do the following?

% of respondents who said email/online notice caused them to take the following action (By social network membership)			
Action	**Total**	**Social Network Members**	**Non Members of Social Networks**
Tell a friend about a candidate	47%	51%	36%
Contribute to a candidate or cause	16%	17%	12%
Volunteer for a candidate or cause	16%	19%	9%
Attend a meeting or rally for a political candidate	17%	19%	13%
Voted as a result of email	35%	36%	33%
Other	23%	19%	34%

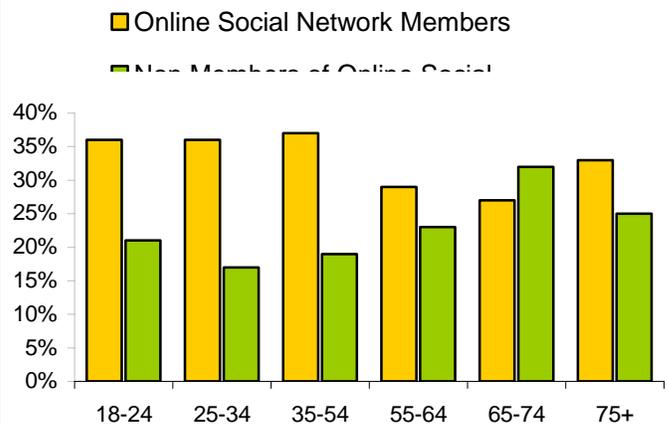Some trends of note about those who belong to online social networks:

- **Of those who intend to vote**

  » 72% are members of online social networks
  » 28% are non-members

- **The more in tune with online social networking, the more likely to respond to online political notices and keep the buzz going. Breaking respondents into groups who belong to no online networking sites, one site, or two or more sites, we can see the most active users of networking sites are more likely to become part of the political buzz.**

  » 31% of those who belong to one network become politically active in response to an online political notice
  » But 40% of those who belong to two or more networks do the same

- **Respondents who are relatively more active in online social networking sites than others are also more likely to tell friends about a candidate in response to an online political message or notice.**

  » 47% of those who belong to one networking site report telling a friend about a candidate after getting a political notice online.
  » 55% of respondents who belong to two or more networking sites tell a friend about a candidate after an online notice.

# of Online Social Network Sites	Online Notice Caused Respondent to Contribute, Volunteer, or Attend a Meeting for a Candidate	Tell a Friend About a Candidate
None	20%	36%
One	31%	47%
2 or more sites	40%	55%

It is tempting to think that the lack of political activity among social networking site members may be due to the fact that over half of those who belong to social networks are in the two youngest age groups, 18-24 and 25-34. Younger Americans have been shown in numerous studies to be among the least political active in society (Wattenberg, Martin P. 2007. *Is Voting for Young People?* New York: Pearson Longman).

However, if we look at the proportion of each age group's respondents who respond to email or online notices, each group is roughly equally unlikely to respond. Only 36% of the three youngest age groups report that an online notice has caused them to contribute, volunteer, or attend a meeting or rally for a candidate or a cause. Examining activism by political party yields similar results.

% of social network members and nonmembers by age group who had an email/online notice cause them to contribute, volunteer, or attend a meeting/rally		
Age	Online Social Network Members	Non Members of Online Social Networks
18-24	36%	21%
25-34	36%	17%
35-54	37%	19%
55-64	29%	23%
65-74	27%	32%
75+	33%	25%

This data raises more questions than it answers.

- What are the best ways for online social networks to build grassroots support for a candidate or cause?
- What is the value of the user generated content in a campaign?
- Is quantity of views more important than quality of the submissions?
- What determines how viral a message will be?
- What can be done to drive the viral spread of a campaign message?
- How can candidates and advocates harness the power of the online social network sites to gain name recognition, increase contributions and get out the vote?

We expect rapid developments in online social media that will in part be driven by the use of it for 2008 campaigns. As we did not ask about online social networks in the 2006 survey, these first data points will be extremely helpful in shaping questions for the next voter expectations survey.

2. *Internet tools are seen as very effective by political consultants for reaching liberal activists, while more conventional campaign methods are seen as the most effective for reaching social conservatives.*

When consultants were asked what tools are effective for reaching specific groups, online tools rank among the most popular choices for reaching liberal activists. While newspaper ads, radio ads, and yard signs/outdoor billboards are the only tools out of seventeen that were chosen by less than 50% of consultants, blogs and podcasts (77%) and email (76%) were the two most popular tools seen as effective for reaching liberals. In fact, of the five most popular choices, candidate events (75%) were the only conventional campaign tool. The other two in the list of the five most popular choices were candidate websites (74%) and online video (72%). Social networking sites were eighth of the seventeen choices with (65%), followed by online ads (64%), and webcasts (63%).

Social conservatives are seen as more open to historically accepted campaign tools than those using the Internet. Candidate events (77%) were the most popular choice, followed by debates (75%), direct mail (74%), radio ads (71%), and television or cable ads (70%). Of online tools, candidate websites were the most popular (65%), followed by email (63%), online ads (51%), blogs and podcasts (47%), webcasts (40%), and social networking sites (33%).

Effective methods for candidates and advocates to reach and persuade the following groups of people. Responses Ranked by % of Consultants

Methods	Liberal Activists	Social Conservatives
Blogs and Podcasts	77%	47%
Email	76%	63%
Events with Candidate	75%	77%
Candidate Website	74%	65%
Online Video	72%	46%
Debates	70%	75%
Word of Mouth	66%	66%
Social Networking Sites	65%	33%
Online Ads	64%	51%
Webcasts	63%	40%
TV/Cable Ads	62%	70%
Direct Mail	61%	74%
Text Messaging	53%	21%
Phone	51%	59%
Newspaper Ads	42%	62%
Radio Ads	40%	71%
Yard Signs/Billboards	38%	50%
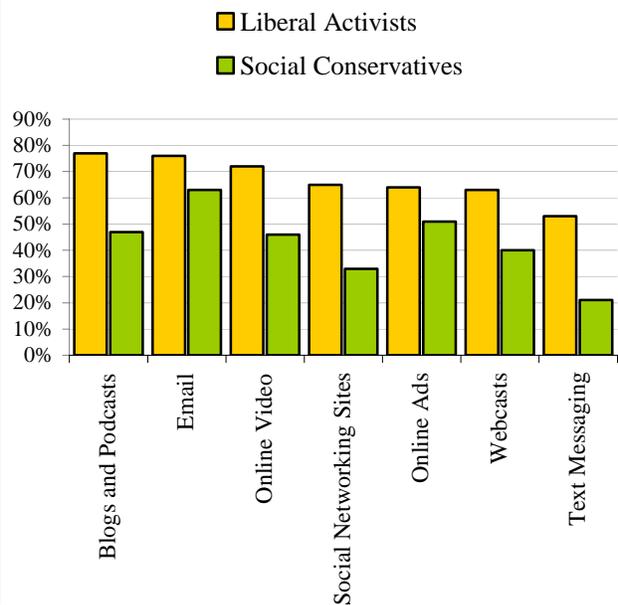
3. Consultants continue to underestimate the impact of Internet tools for effectively reaching constituents.

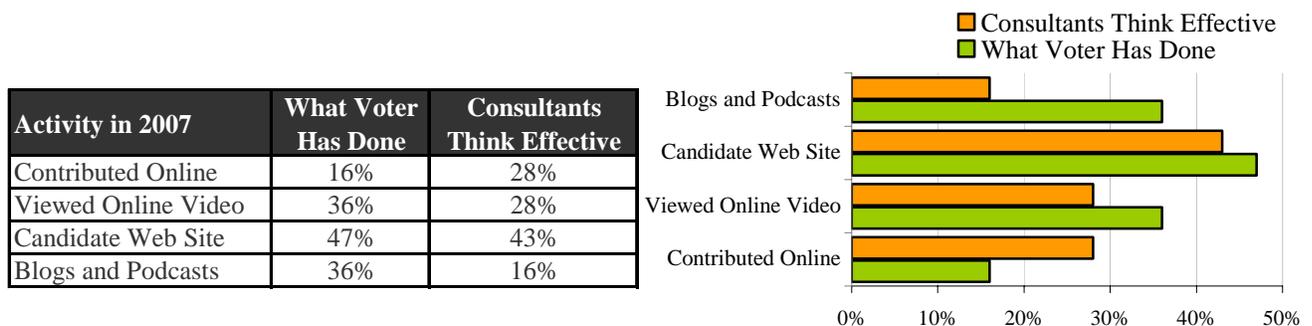**Some intriguing differences emerge when data from 2006 is compared to 2007:**

- Agreement emerges about effectiveness of online ads: Voters go from 13% to 30% and consultants 8% to 30%
- Similar growth in identifying Web sites as effective: voters rose 33% and consultants 34% in their positive opinions
- Effectiveness of blogs and podcasts: increased for voters from 11% to 29% and decreased for consultants from 17% to 16%

2007 Respondents

Best Way to Get Attention	Voters	Consultants
Online ads	30%	30%
Internet video sites	31%	28%
Official web site	53%	43%
Blogs and podcasts	29%	16%
Social networking sites	24%	19%
Webcasts	21%	13%

When data from the 2007 voter expectations survey and the political consultant survey were compared, some indicators of the gap between the consultants' view of a successful media plan and what really reaches voters are apparent.

When asked about what actions they took, again voters showed an interest in things Internet more than the consultants might expect them to, though the consultants seem to have gotten ahead of the voters on the question of raising money online. Early success by McCain in 2000 and Dean in 2004 has perhaps given the consultants a false sense of optimism about how much can be raised online. The early experiences of the Obama and Clinton campaigns show that with proper outreach, an audience can be found to contribute online but in general it is not as easy as it looks.

Activity in 2007	What Voter Has Done	Consultants Think Effective
Contributed Online	16%	28%
Viewed Online Video	36%	28%
Candidate Web Site	47%	43%
Blogs and Podcasts	36%	16%

4. *Reaching the Loyal Base online is becoming more popular across all parties.*

Consultants prefer conventional methods to reach base or swing voters, but online methods are now somewhat more popular for reaching the base.

Ranking consultants responses' by the proportions of those who chose a response among their top three or by what they thought was the most effective way to reach voters, conventional campaign methods are clearly preferred to those online. The analysis implies that consultants may view online tools as more effective for mobilizing supporters by being a tool that reminds them of "their candidate" than being effective for persuading voters.

When consultants were asked to choose the top three most effective methods to reach and persuade base voters, the five most popular methods include only email (38%) as the second most popular online tool. Direct mail is the most popular with 41% reporting it as among the three most effective.

Given that the loyal base voters are usually just mobilized toward the end of the campaign, it is not surprising that direct mail and email are the two most popular methods since they are useful tools to remind voters to go to the polls. Rounding out the list of the top five are conventional campaign tools: events with the candidate (37%), television or cable ads (28%), and word of mouth (27%). Candidate websites (23%) was the sixth on this list and other online methods were among the lower half.

Methods	Loyal Base	Swing…
Direct Mail	41%	36%
Email	38%	11%
Events with Candidate	37%	25%
TV/Cable Ads	28%	48%
Word of Mouth	27%	30%
Candidate Website	23%	14%
Phone	21%	15%
Debates	13%	34%
Blogs and Podcasts	12%	9%
Radio Ads	11%	20%
Social Networking Sites	9%	8%
Yard Signs/Billboards	8%	10%
Online Ads	7%	8%
Online Video	7%	11%
Newspaper Ads	6%	7%
Webcasts	3%	3%
Text Messaging	2%	2%
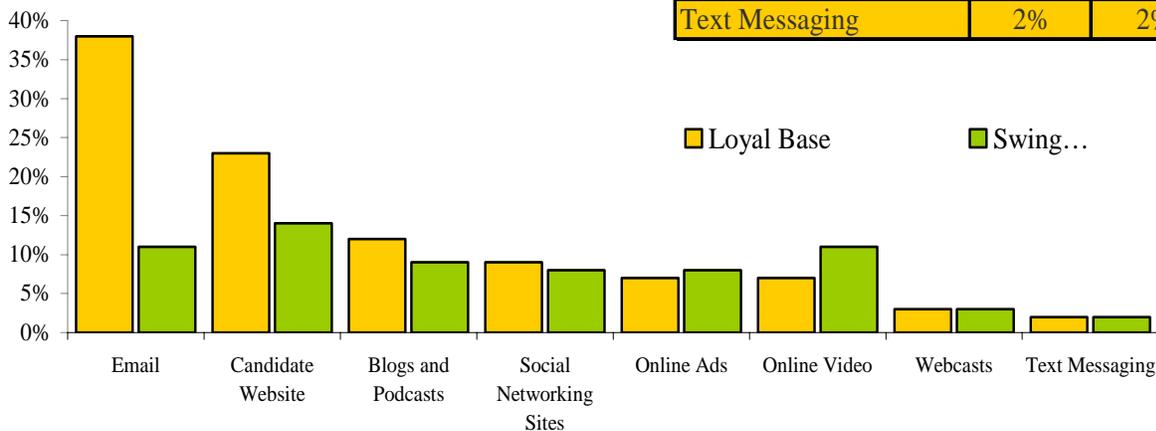
Online outreach tools are generally not popular among consultants to reach swing, independent, or undecided voters. Ranking consultants' responses to a question asking them to choose methods among the top three most effective to reach and persuade swing, independent, or undecided voters, conventional methods are clearly more popular than those online. The top five responses using these criteria are television or cable ads (first with 48% choosing them), direct mail (36%), debates (34%), word of mouth (30%), and candidate events (25%). Of seventeen options, online methods largely fell in the lower half of responses: candidate websites (14%), email (11%), online video (11%) were 8th, 9th, and 10th, respectively.

Ranking consultants' responses as the #1 most effective method for reaching base and swing, independent, or undecided voters shows largely the same results. If similar methods are collapsed together into categories, online methods fair better with consultants as tools for reaching base voters. Online methods are grouped together into one category: email, online ads, candidate websites, blogs and podcasts, webcasts, online video, and social networking sites. Events includes events with the candidate and debates:

- 20% of consultants view online methods as the most effective way to reach loyal base voters, but the most popular are events with 21% of consultants choosing them as the most effective.
- TV/Cable ads were the most popular choice as the most effective method to reach swing, independent, or undecided voters (27%), followed by events (24%), and word of mouth (15%).
- Most consultants did not see online methods as effective for reaching voters "in the middle," as only 10% view online methods as the most effective tool for connecting with them.

#1 effective way to reach loyal base voters	% of Consultants	#1 effective way to reach swing and undecided voters	% of Consultants
Events	21	TV	27
Online	20	Events	24
Direct Mail	17	Word of Mouth	15
Word of Mouth	15	Direct Mail	10
TV	13	Online	10
Phone	6	Other	6
Text Messaging	1	Phone	4
Other	6	Yard signs/billboards	1
Radio	0	Newspaper Ads	1
Newspaper Ads	0	Radio	1
Yard Signs/billboards	0	Text Messaging	1

Most Internet tools are viewed as effective for every audience or for reaching base voters, but large proportions of consultants think it is still to early to judge the effectiveness of those online tools.

Which audience are the following methods effective in reaching…?

Method	Effective for every audience	Effective only for reaching the loyal base	Effective for persuading swing, ind, undecided voters	Still too early to say if effective and for whom	Not effective/no one pays attention
Acquisition of email lists	33%	24%	13%	14%	15%
Blog and podcasts	16%	33%	19%	24%	8%
Candidate email newsletters	20%	56%	10%	9%	5%
Candidate web sites	43%	32%	14%	7%	4%
Internet for GOTV	26%	30%	11%	27%	6%
Online Advertising	30%	10%	18%	30%	13%
Online fundraising	28%	53%	7%	7%	5%
Online video	29%	21%	18%	27%	6%
Paid search ads	22%	9%	16%	33%	20%
Social Networks	19%	21%	20%	34%	7%
Voter-generated content	26%	22%	19%	25%	8%
Webcasts	13%	34%	12%	32%	10%

Consultants are roughly evenly divided on how they view the Internet as a medium for reaching voters. Candidate email (56%) and fundraising (53%) are chosen by a majority of consultants as effective for reaching the candidates' base voters, which echoes most of the media coverage of the Internet's role in campaigns.

Other than these methods, consultants sort themselves roughly evenly between being of the opinion that the Internet is effective for everyone, effective for reaching the base, or that it is still too early to say if its effective and for whom, for GOTV, online video, and voter-generated content. Another indication that respondents' hesitations reflect an understanding of how the Internet should be used for campaigns is that no other online tool listed in the above table garners a majority of consultants under a single category.

There does not appear to be an obvious pattern to how consultants rate the effectiveness of the respective Internet tools listed above. A plurality of consultants say that it is still too early to say whether paid online advertising is effective or not, as 33% of them say that for paid search ads and 30% do so for online ads. Over thirty percent of consultants report that blogs and podcasts, webcasts, and web sites are good for reaching loyal voters.

5. *Voter respondents prefer television ads as a method of outreach from candidates, but there is significant demand for online campaigning.*

There is an ongoing debate within campaigns about media mix and the choice of tools to reinforce a message. How much impact can the Internet really have on voters and how much of the communications budget should be devoted to developing an online campaign strategy?

Respondents were asked to choose the best ways for a candidate or advocate to get their attention for the 2008 election from a list that included conventional campaign methods as well as various online tools.

- More respondents place television or cable advertising among the best ways to reach them than any online method. The rate rose from 43% in 2006 to 64% in 2007. Is it perhaps because those are the easiest messages to ignore or TiVo away or because the production values have improved over the years?
- "Word of mouth" was the third most popular method and this may indicate that Americans are open to the influence of savvy online campaigns that create a mainstream buzz. From 2006-2007, the percentage increased four-fold for the effectiveness of word of mouth.
- Candidate websites and email are among the top four methods in 2007 and within the top five methods in 2006. Websites were seen as less effective than email in 2006 but in 2007 websites were seen as significantly more effective.
- Blogs and podcasts were seen by only 2% of those in 2006 as effective while in 2007 the number has grown to 29%
- Men and women differ in how they ranked methods of outreach after the top three, but they largely reflect each other in terms of the proportions of each group that chose that method among the best ways to get their attention.

Most Popular Ways for Candidates to Capture Respondents' Attention Respondents were asked to choose all that applied from the list.

Method	% All Respondents 07
TV Ads	64%
Web Site	53%
Word of Mouth	48%
Direct Mail	37%
Email	36%
Newspaper Ads	35%
Radio Ads	35%
Internet Video Sites	31%
Online Ads	30%
Blogs and Podcasts	29%
Yard Signs	29%
Social Network Sites	24%
Webcasts	21%
Phone	12%
Text Messaging	10%
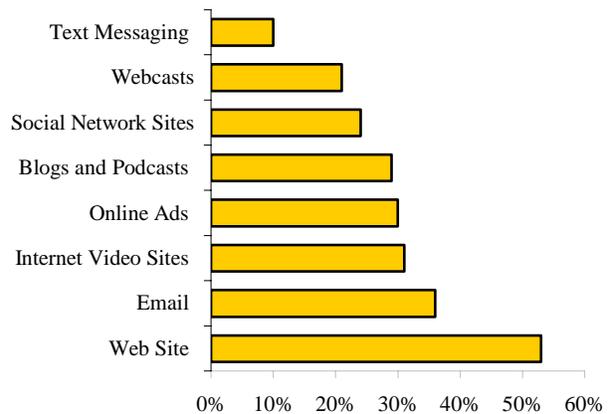
Evidence from the *Pew Internet & American Life Project* shows that relatively more younger Americans (36 or younger) use the Internet for most of their election and political information than older Americans though all age groups still largely prefer television or cable ads among the best ways for candidates or advocates to reach them.

The youngest age group, 18-24, prefers TV ads as a way for candidates or advocates to reach them more than any other group, as indicated below (with the exception of the 65-74 group, but this is a very small portion of the sample overall). The three youngest groups are more likely to prefer candidate websites, but less than a majority of all four of the youngest groups chose email as a good method for outreach. 59% of the 18-24 group liked "word of mouth" as a method of outreach, which may provide further proof that younger users are the ones that are most susceptible to online buzz or are that they are the ones that spark a buzz over savvy online campaign strategies.

The Top Four Preferred Ways of Outreach
% Broken Down by Age Group

Age Group	TV Ads	Website	Word of Mouth	Email
18-24	67	56	59	38
25-34	58	48	47	34
35-54	64	54	44	33
55-64	66	46	30	33
65-74*	67	33	37	53
75+*	60	27	47	60

* Age group is small proportion of the sample

6. Consultants consider Internet tools a poor choice for reaching Latino/Hispanic communities.

As we dig down into the data to see where traditional and new techniques are seen as effective, the methods for outreach to Latino/Hispanic communities reveal some blind spots about minorities online.

According to the March 2007 Pew survey "Latinos Online," 56% of Latinos go online (Pew Internet & American Life Project and Pew Hispanic Center, "Latinos Online: Hispanics with Lower Levels of Education and English Proficiency remain largely disconnected from the Internet" March 14, 2007) While relatively more Latinos have not completed high school (41%) compared to whites (32%) and African Americans (25%), 80% of second generation and 71% of third generation of Latino Americans use the Internet. Perhaps consultants' biases against reaching out to Latinos online is due to Latinos being relatively less likely than whites to have an Internet connection at home-- 29% of Latinos compared to 43% of white Americans.

We must also ask is material routinely translated on candidate web sites? Are options given for receiving candidate newsletters or emails in Spanish? Can Spanish speakers communicate with the candidates on their social networking pages?

Internet tools are not seen as effective by most consultants for reaching and persuading Latino/Hispanic voters. Four of five methods chosen most often by consultants as effective are offline, traditional campaign tools. Word of mouth is the most noted method, with (73%) of consultants choosing it, followed by television or cable ads (69%), candidate events (63%), and radio ads (60%).

Online methods are among the least popular choices suggested by consultants for reaching out to this community, with only candidate websites (36%) among the top ten chosen. Besides candidate websites, the other methods ranked as follows: email (31%), online ads (23%), online video (23%), social networking sites (23%), blogs and podcasts (14%), and webcasts (13%).

Which of the following are effective methods for candidates and advocates to reach and persuade Latinos and Hispanics?

Activity to Reach Latinos/Hispanics	% of Consultants
Word of Mouth	73%
TV/Cable Ads	69%
Events with Candidate	63%
Radio Ads	60%
Direct Mail	56%
Yard Signs/Billboards	47%
Phone	44%
Candidate Website	36%
Newspaper Ads	34%
Debates	33%
Email	31%
Online Ads	23%
Online Video	23%
Social Networking Sites	23%
Text Messaging	17%
Blogs and Podcasts	14%
Webcasts	13%
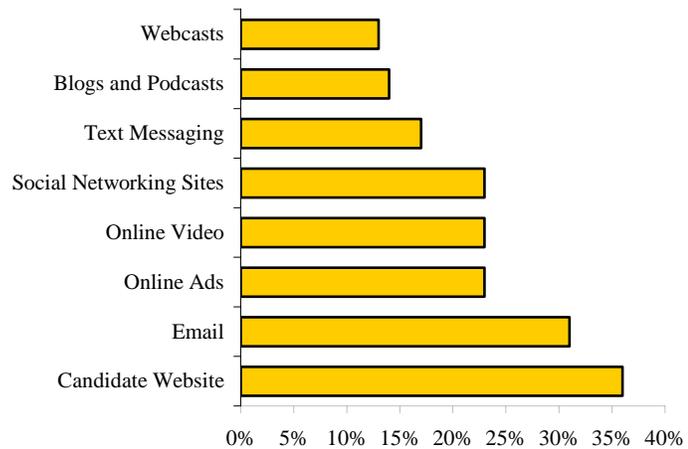
## 7. *Single Women are seen as active users of online social media tools.*

Email, websites, and social networking sites are the most popular Internet tools reported as effective for reaching single women.

While online tools do not top the list of methods seen as effective to reach single women, it is noteworthy and significant that email (57%), websites (52%), and social networking sites (51%) are among the most frequently selected responses among consultants. Online video is seen as the next most popular online tool with (40%) of consultants choosing that, followed by online ads (39%), blogs and podcasts (30%), and webcasts (22%).

The most popular way to reach single women is word of mouth (70%) though television or cable advertising was selected by 66% of consultants as effective. Candidate events were the third most popular choice for effective outreach tools, while direct mail was fourth (60%).

Which of the following are effective methods for candidates and advocates to reach and persuade single women?

Activity to Reach Single Women	% of Consultants
Word of Mouth	70%
TV/Cable Ads	66%
Events with Candidate	61%
Direct Mail	60%
Email	57%
Candidate Website	52%
Social Networking Sites	51%
Phone	47%
Debates	45%
Radio Ads	40%
Online Video	40%
Online Ads	39%
Text Messaging	35%
Newspaper Ads	30%
Yard Signs/Billboards	30%
Blogs and Podcasts	30%
Webcasts	22%
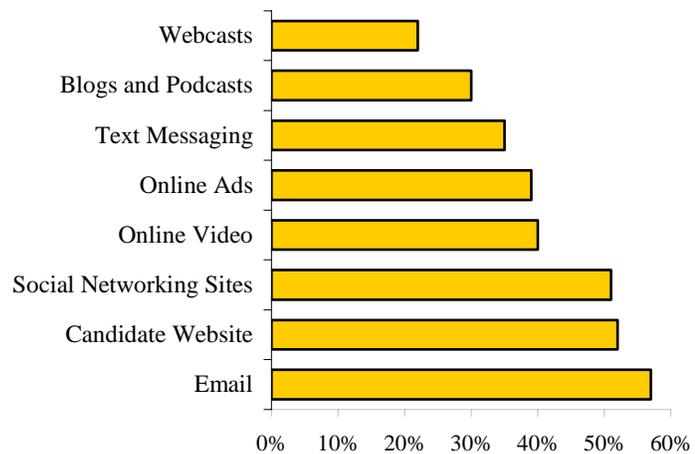
8. *Over 70% of consultants still have serious hesitations about using Internet tools in campaigns.*

Consultants' hesitations about recommending the Internet still reflect a general lack of understanding of how people use the Internet.

Most consultants are hesitant to recommend the Internet to their clients because they are generally unsure of how to reach their targets or are unsure of how to effectively use the web because they do not have enough information. In general, approximately 28% of all consultants have no hesitations recommending the Internet for online campaigns, but the top five reasons they cite for being hesitant include that their targets are not online (14%), they cannot target groups effectively online (14%), or their client is hesitant (5%). The other two reasons include that there is not enough information available about when and how the Internet may be an effective campaign tool (9%) and generally they do not know how best to use it.

Primary Hesitation or Hurdle	%
No Hesitations	28
The People We are Looking for Are Not Online	14
Can not target accurately	14
Not enough information available about	9
Don't know how best to use it	7
Would recommend but client is hesitant	5
Not a reach medium	4
Not an emotional medium	4
Takes too much time	3
Not a trusted medium	3
No reason to change from what I know	3
Other hesitation	3
Too expensive	1
Security concerns	0.4

These hesitations are not necessarily a result of how long they have been in the business. More than half of consultants with 1-5 years of experience (68%) to more than 35 years (83%) all are hesitant to recommend the Internet to achieve their clients' political and communication goals. Breaking consultants down into partisan and into types that have more specific audiences, they all largely reflect a lack of knowledge of how to use the medium to reach their targets and use the medium effectively.

This hesitation to act may reflect that Internet consumption/usage data is hard to come by for many state and local candidate races. Another common reason among the five most cited hesitations is that their targets may not be online. This may be true for candidates or organizations targeting minorities or older voters, but it may also be that information on where users go on the Internet is often proprietary information.

Consultants with relatively fewer years of experience are more open to reaching out to swing voters using online methods than those with more than five years. However, years of experience does not factor into consultants' views of reaching base voters online.

% Consultants by what they ranked as most effective way to reach and persuade swing voters						
Methods	<1 *	1 to 5	6 to 15	16 to 25	26 to 35	> 35*
Online	29%	15%	3%	0%	5%	6%
TV	0%	2%	5%	2%	3%	6%
Radio	0%	2%	2%	0%	3%	6%
Events	43%	19%	11%	16%	8%	0%
Newspaper Ads	0%	8%	5%	0%	5%	6%
Word of Mouth	14%	23%	13%	16%	8%	11%
Yard Signs/Billboards	0%	0%	3%	2%	0%	0%
Phone	14%	8%	13%	14%	8%	6%
Direct Mail	0%	21%	48%	45%	53%	56%
Text Messaging	0%	4%	0%	0%	0%	0%
Other	0%	4%	6%	6%	5%	11%

% Consultants by what they ranked as most effective way to reach and persuade loyal base voters						
Methods	<1 *	1 to 5	6 to 15	16 to 25	26 to 35	> 35*
Online	43%	17%	17%	18%	18%	33%
TV	0%	17%	10%	18%	13%	11%
Radio	0%	2%	2%	0%	0%	0%
Events	43%	21%	27%	14%	21%	11%
Newspaper Ads	0%	0%	2%	0%	0%	0%
Word of Mouth	14%	25%	8%	20%	11%	11%
Yard Signs/Billboards	0%	0%	0%	0%	0%	0%
Phone	0%	2%	6%	6%	11%	6%
Direct Mail	0%	6%	22%	22%	24%	17%
Text Messaging	0%	4%	0%	0%	0%	0%
Other	0%	8%	6%	4%	3%	11%

* Number of years in business a small part of the sample

There are distinct differences in the perceptions about how many likely voters are online. Even if voters were online, the consultants say they are not sure they could find them.

Top 5 Reasons Partisan Consultants are Hesitant to Use the Internet

Democrats	%	Republicans	%	Independents	%
People not online	17	Cannot target	14	Not enough info	11
Cannot Target	14	Not enough info	13	Client hesitant	11
Don't know how	8	People not online	10	Cannot target	9
Client hesitant	7	Do not know how	9	People not online	9
Not emotional medium	7	Client hesitant	5	Do not know how	9

PACS	%	527s	%	Unions	%
Cannot Target	20	Cannot Target	13	Cannot Target	16
People not online	13	Client hesitant	11	People not online	16
Not enough info	13	Don't know how	11	Not reach medium	14
Client hesitant	9	Not enough info	8	Don't know how	9
Don't know how	6	People not online	7	Not an emotional medium	7

We see approximately the same percentage of consultants showing no hesitations to use online tools from the survey in 2006 but some of the hesitations increasing for targeting. Over the past five years, cost is dropping as a barrier, as is the notion that the Internet is not an emotional media. Interestingly, those with a 4-6 presidential cycles under their belts are more likely to use the Internet than their colleagues with more experience and about equal to those with little experience.

Yrs. Experience	Hesitations	No Hesitations
less than 1	57%	43%
5-Jan	68%	32%
15-Jun	75%	25%
16-25	69%	31%
26-35	76%	24%
More than 35	83%	17%
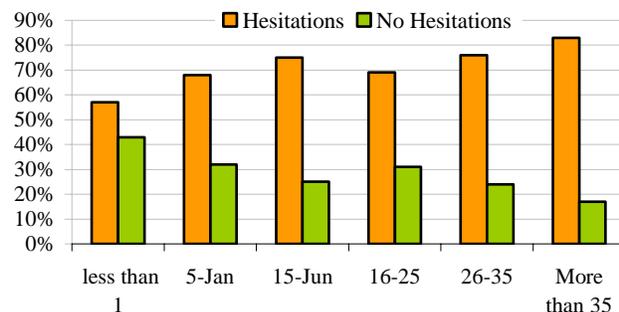
9. Constituents are more likely to forward a message about a candidate or cause than they are to act on it themselves.

We detect a trend here. In the old days, activists had to go somewhere to show their interest in a candidate or cause—attend a rally or fund raiser, participate in a phone bank at a campaign office, write a check and drop it in the mail. While candidates have focused on collecting email addresses, we see the rise of the online social networks as a way for the peer-to-peer communications that grassroots activists strive for to get their messages out.

What does it mean to be an activist in the new political landscape?

Over eight out of ten respondents to the voter survey have been politically active at one point, but are not very responsive to online notices or emails.

As in Finding 1, activism is defined here as having done at least one of the following: 1) Signed up for a candidate newsletter, 2) Signed up to receive notices from politically active organizations, 3) Sent email to friends or family about politics, 4) Contributed to a candidate or cause online, 5) Sent an email to a candidate or politician about your concerns, 6) Attended a meeting or rally for a candidate as a result of an email or online notice, 7) Told a friend about a candidate about a candidate as a result of an email or online notice, 8) Voted as a result of an email or online notice

Most respondents report being active at one point in their lives (84%) and most subgroups in the survey report being roughly equally active. Men are slightly more active in politics than women (87% relative to 82%), but strong majorities of both participate in politics. All age groups approximately equally report performing a political act at one point.

Rates of Political Activism by Gender and Age

Gender	Active	Age	Active
Male	87%	18-24	87%
Female	82%	25-34	82%
		35-54	82%
		55-64	87%
		65-75*	93%
		75+*	73%

* Both age groups are small proportions of the sample relative to other groups.

Despite their high rates of activism, respondents are not very responsive to online notices or emails in terms of being triggered to participate in politics. Only 31% of the sample has reported contributing to a candidate or cause, volunteering for a candidate or a cause, attending a meeting or rally for a candidate, telling a friend about a candidate, or voting.

However, respondents are relatively much more likely to respond to notices by telling a friend about a candidate (47%). Members of online social networking sites are more likely than the rest of the sample to tell friends about politics after receiving an email or online notice (51%). Further investigation is needed on the methods used to spread the word.

All Respondents		Members Social Networking Sites	
Action	**%**	**Action**	**%**
Contribute	16%	Contribute	17%
Volunteer	16%	Volunteer	19%
Attend Meeting	17%	Attend Meeting	19%
Tell Friend	47%	Tell Friend	51%
Vote	35%	Vote	36%

Breaking the sample into multiple subgroups fails to reveal a constituency group that would be more politically responsive to an online notice or email.

- Younger voters, Democrats, and more liberal respondents are slightly more likely to participate in politics in response to online notices and emails than the rest of the sample. 36% of the respondents aged 18-24 and 32% of respondents in the 25-34 group participate politically after an email or online notice.
- Democrats are more responsive to emails and notices than Republicans and Independents by approximately 10%. Liberals are 10% more responsive than conservatives and 14% more responsive than moderates.
- Men respond in greater proportions than women as 38% report being politically active due to an email or online notice and only 28% of women doing the same.

Politically Active Responses to Email or an Online Notice by Age, Partisanship, and Ideology, and Gender

Partisanship	%	Ideology	%
Democrat	37%	Liberal	39%
Republican	27%	Moderate	25%
Independent	27%	Conservative	29%

Age	%	Gender	%
18-24	36%	Male	38%
25-34	32%	Female	28%
35-54	29%		
55-64	26%		
65-74	30%		
75+	27%		

10. People who are online show a strong intent to vote and are very likely to seek political information online.

Three out of four of all respondents, with liberals and conservatives about equally inclined, and Independents and moderates less likely, to vote in the 2008 primary election.

Most respondents, regardless of how the sample is broken down into subgroups, intend to vote in the 2008 primary election. Reflecting common wisdom, the survey shows younger voters are relatively less likely to vote than the whole sample, especially those voters aged 55 or older. Eight percent more of men intend to vote in next year's primary than women, but both still intend to vote in large numbers.

Respondents Intention to Vote in the 2008 Primary Election

All	Intend	Gender	Intend	Age	Intend
Yes	74%	Male	79%	18-24	68%
No	14%	Female	71%	25-34	69%
				35-54	85%
				55-64	83%
				65-74*	87%
				75+*	87%

* Age groups are small proportion of sample

Partisans and those with stronger ideologies are relatively more likely to vote than others. Democrats and Republicans each report intending to vote in higher proportions than the overall sample and political independents.

- 84% of Democrats and 82% of Republicans intend to vote, while only 74% of the sample and 65% of Independents said so
- 13% more Liberals intend to vote relative to moderates, while 9% more conservatives intend to vote compared to those in the ideological center

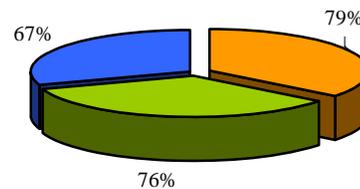**Respondents' Intention to Vote in the 2008 Primary Election by Party and Ideology**

Party	Intend
Democrat	84%
Republican	82%
Independent	65%

Ideology	Intend
Liberal	79%
Conservative	76%
Moderate	67%

Democrat Republican Independent
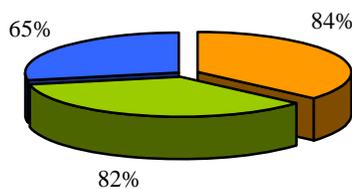
Liberal Conservative Moderate

65% 84%

82%

67% 79%

76%

Respondents who intend to vote show a strong proclivity to participate in political activities and seek political information online.

- At least 80% of respondents planning on voting in the 2008 primary election will seek information online
- 83% and 81% of respondents, send email to or receive email from friends and family about candidates.
- 83% of likely voters watch online videos about candidates.

Likely Voters and Online Political Activity			
Intend to Vote?	Yes	No	Not Sure
Visited a Candidate's Web Site	83%	9%	8%
Used Search Engine to Find Candidate Info	82%	10%	8%
Signed up for Candidate Newsletter	88%	6%	6%
Signed up to Receive Notices for Politically Active Organizations	86%	8%	6%
Read a Blog About Candidates	80%	11%	9%
Sent Email to Friends/Family about Politics	83%	8%	9%
Received Email from Friends or Family about Politics	81%	8%	10%
Viewed Online Videos about Candidates	83%	9%	9%
Contributed to a Candidate or Cause Online	91%	4%	5%
Sent an Email to a Candidate or Politician about Concerns	84%	7%	9%

CONCLUSIONS

The election of 2008 has created some new dynamics in the campaigns that seem to be playing to the advantage of the Internet.

- **Virtual Candidates**

  The front loaded primary schedule now makes it nearly impossible for a candidate to visit all the stops that need to be covered. Webcasts, online social media activities, and web video are ways to create relationships with voters by almost looking them in the eye and shaking their hand. How will the online social media tools help campaigns build on those relationships?

- **Media Budgets**

  So much money is being raised that it can not all be spent on traditional media. Advertising for the Super Duper Tuesday primaries in early February will collide with Christmas advertising and it is the week after the Super Bowl. How many candidates will try to buy a spot on the Super Bowl broadcast? How many will advertise online where sports fans go?

- **Free is Good**

  Sites that aggregate and propagate user generated content will continue to grow with online widgets and production tools designed for candidates and causes showing strong viral possibility. Political consultants and advocacy groups are notorious for liking free things. While they are wary of the amateurs, this source of content and buzz will grow increasingly valuable. Note: the work that goes into a successful online social media strategy and implementation costs real money.

- **Peer Pressure**

  All the candidates are doing something online with most participating to some degree in online social networks. Peer pressure has started to raise the bar for online activities and quality of a candidate's web presence. Where they once could ignore the Internet, now the senior political advisors have to keep track of all the different tools their competitors might try including their online presence.

- **The End of the Private Candidate**

  Gotcha politics will grow with the proliferation of digital capture devices. Again the ease of use of the online social networks which allow for a quick note to thousands of friends will fuel the desire of constituents to tell their friends about buzz worthy material. Rapid response to such videos will become routine.

▪ **Accelerating Change**

The rate at which the digital and online tools have changed for voters and consultants means that campaigns in 2008 will look very different from 2004. While there were differences between 2000 and 2004, a much broader range of online and mobile choices are now available as candidates, advocates and party officials use the Internet to persuade, raise funds and get out the vote.

▪ **Fighting the Last War**

Stubborn resistance to change will continue to hamper the risk adverse political insiders. New faces will become stars because of innovative uses of the Internet to get their candidates elected and measures approved in 2008

Feedback welcomed on this document.

Send comments to Karen Jagoda : karen@e-voterinstitute.com.

Please visit the web site http://e-voterinstitute.com for previous research and webcasts, and to sign up for future notices.

FURTHER BACKGROUND

APPENDICES

- **A - Questions for the E-Voter Institute's 6th Annual Survey of Political and Advocacy Communication Leaders**

- **B - Questions for the E-Voter Institute's 2nd Annual Voter Expectations Survey**

Appendix A - 6th Annual Survey of Political and Advocacy Communication Leaders -2007

1. **Which methods are most effective for candidates and advocates to reach and persuade "Loyal base" voters? Please select the top THREE most effective methods.**

    - ❑ Events with candidate
    - ❑ TV/Cable ads
    - ❑ Direct mail
    - ❑ Radio ads
    - ❑ Phone
    - ❑ E-mail
    - ❑ Newspaper ads
    - ❑ Yard signs/outdoor billboards
    - ❑ Online ads
    - ❑ Candidate web site
    - ❑ Blogs and podcasts
    - ❑ Debates
    - ❑ Webcasts
    - ❑ Online video
    - ❑ Social networking sites
    - ❑ Text messaging
    - ❑ Word of mouth
    - ❑ Other (Please Specify) _____

2. **Please rank the three methods you selected in the previous question in order of their effectiveness at reaching and persuading "Loyal base" voters. Place a '1' next to the MOST effective method, a '2' by the second most effective method and a '3' next to the third most effective method.**

3. **Which methods are most effective for candidates and advocates to reach and persuade <u>"Swing, Independent, Undecided" voters</u>? Please select the top THREE most effective methods.**

    - ❑ Events with candidate
    - ❑ TV/Cable ads
    - ❑ Direct mail
    - ❑ Radio ads
    - ❑ Phone
    - ❑ E-mail
    - ❑ Newspaper ads
    - ❑ Yard signs/outdoor billboards
    - ❑ Online ads
    - ❑ Candidate web site
    - ❑ Blogs and podcasts
    - ❑ Debates
    - ❑ Webcasts
    - ❑ Online video
    - ❑ Social networking sites
    - ❑ Text messaging
    - ❑ Word of mouth
    - ❑ Other (Please Specify) _____

4. **Please rank the three methods you selected in the previous question in order of their effectiveness at reaching and persuading <u>"Swing, Independent, Undecided" voters</u>. Place a '1' next to the MOST effective method, a '2' by the second most effective method and a '3' next to the third most effective method.**

5. **Which ONE of the following is the primary hesitation or hurdle you have with using and recommending the Internet for your clients' political/communications goals?**

   ❑ Not a reach medium
   ❑ Can not target accurately
   ❑ The people we are looking for are not online
   ❑ Too expensive
   ❑ Would recommend but client is hesitant
   ❑ Don't know how best to use it
   ❑ Takes too much time
   ❑ Not an emotional medium
   ❑ Not a trusted medium
   ❑ Not enough information available about effectiveness
   ❑ Security concerns
   ❑ No reason to change from what I know works
   ❑ Other hesitation
   ❑ No hesitations

6. **If you bought or are managing an online ad campaign and/or promotion in 2007, on what kinds of sites were/are the ads most successful? Check all that apply.**

	Incumbent Candidate	Candidate is the Challenger
» Newspaper sites		
» TV, radio, or cable related sites		
» Large portal sites with mass audience		
» Search engines		
» Political sites		
» General interest sites like travel, weather, entertainment, lifestyle		
» Female oriented sites		
» Male oriented sites		
» Sites that appeal to younger voters		
» Sites that appeal to older voters		
» Sites based on ethnicity		
» Sites based on religious interests		
» Blogs		
» Social networking sites		
» Online video sites		
» No online ad campaigns in 2007		

7. Which audience are the following methods effective in reaching? Please make one selection for each method.

	Effective for Every Audience	Effective Only for Reaching the Loyal Base	Effective for Persuading Swing, Independent, Undecided Voters	Still Too Early to Say If Its Effective and for Whom	Not Effective/ No One Pays Attention
Online advertising					
Using the Internet to get out the vote					
Paid search ads					
Candidate email newsletters					
Acquisition of email lists					
Online fundraising					
Online video					
Candidate web sites					
Blogs and podcasts					
Social networks					
Webcasts					
Voter-generated content					

8. What is the best Internet tool you have used to win a political or advocacy campaign?

9. **When, if at all, do you think the Internet will be effective for achieving the following political/communications goals for your clients:**

Activity For Which The Internet Is Effective	2008	2012	2016	NEVER
Building database of supporters				
Getting attendance for events				
Recruiting volunteers				
Building campaign awareness				
Rapid response				
Circulating petitions				
Fund raising				
Getting out the vote				
Reaching "likely" voters in the loyal base				
Reaching swing, Independent and undecided voters				
Targeting specific voter blocks				
Special interest advocacy				

10. **In the coming years, what percentage of your clients' political/communications campaign budgets do you estimate will go to all Internet initiatives?**

Year	In percentage								
	0	1	2-3	4-5	6-10	11-20	21-30	31-50	51+
2008									
2012									
2016									

11. Which of the following are effective methods for candidates and advocates to reach and persuade the following groups of people? Check all that apply.

	Liberal Activists	Social Conservatives	Latinos/ Hispanics	Single Women
Events with candidate				
TV/Cable ads				
Direct mail				
Radio ads				
Phone				
E-mail				
Newspaper ads				
Yard signs/outdoor billboards				
Online ads				
Candidate web site				
Blogs and podcasts				
Debates				
Webcasts				
Online video				
Social networking sites				
Text messaging				
Word of mouth				
Other *(Please Specify)* _____				
Other *(Please Specify)* _____				
Other *(Please Specify)* _____				
Other*(Please Specify)* _____				

12. For what kinds of organizations do you typically work? Check all that apply.

- ❏ Democratic candidates
- ❏ Republican candidates
- ❏ Independent candidates
- ❏ PACs or Trade Associations
- ❏ 527 Committees
- ❏ Unions
- ❏ For-Profit businesses
- ❏ Not-For-Profit organizations
- ❏ Organizations outside the U.S.
- ❏ Other (Please Specify) _____

13. How many years of experience do you have working in politics or public affairs?

❑ Less than 1
❑ 1-5
❑ 6-15
❑ 16-25
❑ 26-35
❑ More than 35

14. Business State: _____

15. Business Zip Code: _____

Appendix B - 2nd Annual Voter Expectations Survey 2007

1. **How do you expect candidates to use the Internet? Check ALL that apply.**

   - ❑ Official web site
   - ❑ Fund raising
   - ❑ E-mail
   - ❑ Online ads
   - ❑ Webcasts of events
   - ❑ Blogs and podcasts
   - ❑ Television ads on the official web site
   - ❑ Campaign video on other sites
   - ❑ Participate in social networking sites
   - ❑ Other (Please Specify) _____

2. **What are the best ways for a candidate or advocate to get your attention for the 2008 election? Check all that apply.**

   - ❑ Television or cable ads
   - ❑ Direct mail
   - ❑ Online ads
   - ❑ E-mail
   - ❑ Newspaper ads
   - ❑ Social networking sites
   - ❑ Phone
   - ❑ Official web site
   - ❑ Internet video sites
   - ❑ Radio ads
   - ❑ Webcasts
   - ❑ Blogs and podcasts
   - ❑ Text messaging
   - ❑ Yard signs and outdoor billboards
   - ❑ Word of mouth
   - ❑ Other (Please Specify) _____

3. **How do you find out about news and current events? Check the top three.**

    - ❑ Newspapers
    - ❑ Network television
    - ❑ Local television
    - ❑ E-mail
    - ❑ Cable news
    - ❑ Candidate commercials
    - ❑ Search engine
    - ❑ Online social networks
    - ❑ Radio
    - ❑ Friends and family
    - ❑ Web sites
    - ❑ Magazines
    - ❑ Blogs
    - ❑ Books
    - ❑ People from work
    - ❑ Other (Please Specify) _____

4. **Which of the following have you done? Check all that apply.**

    - ❑ Visited a candidate's web site
    - ❑ Used a search engine to find candidate info
    - ❑ Signed up for a candidate newsletter
    - ❑ Signed up to receive notices from politically active organizations
    - ❑ Read a blog about politics or candidates
    - ❑ Sent email to friends or family about politics
    - ❑ Received email from friends or family about politics
    - ❑ Viewed online videos about candidates
    - ❑ Contributed to a candidate or cause online
    - ❑ Sent an email to a candidate or politician about your concerns
    - ❑ Downloaded video or music to your mobile device
    - ❑ None of the above

5. Which online social networks do you belong to? Check all that apply.

- ❑ 43 Things
- ❑ Bebo
- ❑ Brickfish
- ❑ Broadcaster.com
- ❑ Classmates.com
- ❑ Facebook
- ❑ Flickr
- ❑ Friendster
- ❑ LinkedIn
- ❑ LiveJournal
- ❑ MySpace
- ❑ Tagged
- ❑ Windows Live Spaces
- ❑ Xanga
- ❑ Yahoo! 360°
- ❑ Other (Please Specify) _____
- ❑ I do not belong to any online social network

6. Has an e-mail or other online notice ever caused you to do the following? Please check all that apply.

- ❑ Contribute to a candidate or cause
- ❑ Volunteer for a candidate or cause
- ❑ Attend a meeting or rally for a political candidate
- ❑ Tell a friend about a candidate
- ❑ Vote
- ❑ Other (Please Specify) _____

7. Do you intend to vote in the primary election?

- ❑ Yes
- ❑ No
- ❑ Not sure

8. Which of the following best describes your political affiliation?

- ❑ Democrat
- ❑ Republican
- ❑ Independent
- ❑ Libertarian
- ❑ Prefer not to say

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9. Which of the following best describes your beliefs regarding general issues?

- ❑ I am very liberal
- ❑ I am somewhat liberal
- ❑ I am moderate
- ❑ I am somewhat conservative
- ❑ I am very conservative

10. Gender:

- ❑ Male
- ❑ Female

11. Age:

- ❑ 18-24
- ❑ 25-34
- ❑ 35-54
- ❑ 55-64
- ❑ 65-74
- ❑ 75+
- ❑ Prefer not to answer

12. State: _____

13. Zip Code: _____