Missing the Boat:
How Political And Advocacy Communications Leaders Spend Campaign Funds

E-Voter Institute 2008 Research Findings
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EXECUTIVE SUMMARY OF FINDINGS

- **The vast majority of the consultants think the Internet is effective for reaching the loyal base now and certainly by 2012. Most are optimistic on the effectiveness of reaching swing, Independent and undecided voters with Internet technologies between now and 2012.**

- **The use of email is seen as the most effective way overall to reach loyal base voters, according to all consultants. Candidate web sites are seen as just about as effective as television and cable ads.**

- **Less than 25% of the consultants think candidate web sites and email are effective for reaching swing, Independent and undecided voters. This, however, is a 57% increase over interest expressed in 2007.**

- **Most consultants see steady growth of their clients' budgets dedicated to Internet purposes in the next eight years.**

- **The gap between what consultants are recommending versus what voters are expecting is hard to explain as the consultants themselves are using the Internet extensively except to play online games and to use Twitter.**

- **News-related sites are seen as most effective by consultants for incumbents to reach voters, and sites that attract younger voters are seen as most effective for challengers.**

- **Nine out of ten consultants think that the Internet successfully addresses fundraising and volunteer recruitment with the loyal base, while three out of five consultants see the Internet effective for increasing name recognition with swing, Independent and undecided voters.**

- **Further specifics about reaching certain demographic and ethnic groups illustrate some potential biases that may be influencing how candidates view likely voters. Consultants consider the Internet a good way to reach liberal activists more so than social conservatives. The Internet is not seen as a strong tool for reaching blue collar workers, African Americans, and Hispanics though the candidate web site and email are seen as important. Internet has a strong impact in urban areas with almost as much power in suburban areas.**

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INTRODUCTION

Since the ground-breaking E-Voter '98 study which showed that online advertising had the potential to persuade voters, the E-Voter Institute has continued to delve into how the political and advocacy communications leaders are positioning the Internet in their media strategies.

These findings are intended to help candidates, campaigns, political consultants, media advisors, fundraisers, pollsters, campaign solution providers, web publishers, online ad networks, academics and journalists better understand the impact of the Internet in the campaign process.

Thanks to our supporters for helping to recruit survey respondents: American Association of Political Consultants, Politico, Complete**Campaigns**.com, and PoliticsOnline.

Seeing as Google got the lion's share of the presidential online budgets so far in 2008, we asked Peter Greenberger, Google for some insights that are included as commentary at the end of the research findings.

E-Voter Institute is a non-partisan trade association whose mission is to help accelerate the use of the Internet for politics and advocacy to support a more robust democracy. Karen Jagoda is president and co-founder of the Institute. Previous research is available from http://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). Karen is the host of a weekly Internet radio show, **Digital Politics,** on http://signonradio.com.

HCD Research is a marketing and communications research company that was founded in 1991. HCD Research focuses solely on providing traditional and e-based marketing and communications research services. The company's web-based research combines classical and sophisticated research techniques with innovative on-line applications that enable HCD Research to obtain comprehensive, meaningful data for customers.

A pioneer in Internet marketing and communications research, HCD Research has designed and implemented research studies for numerous large and mid-sized companies in the pharmaceutical, financial services and publishing industries, among others. HCD Research is also the developer of readmylipz.com, a political ad testing web site for the 2004 Presidential campaign. Rich Berke is vice president, Kendall Anderson was the project manager and Michelle Nappa, research analyst for these surveys. For more information, please visit http://www.hcdi.net.

Christopher Borick is the Director of the **Muhlenberg College, Institute of Public Opinion** is a state of the art public opinion research center that conducts scientific based survey research projects of public policy and political issues throughout the

Commonwealth of Pennsylvania. For more information visit
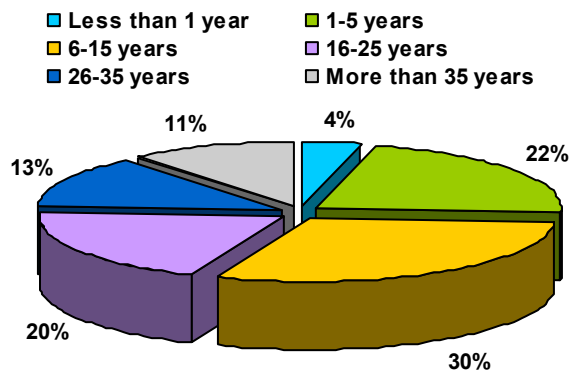http://www.muhlenberg.edu/studorgs/polling/

METHODOLOGY

As in past years, participating organizations ran online ad banners and text links on their websites to attract respondents for the **Seventh Annual Survey of Political and Advocacy Communications Leaders**. In addition, emails were sent to membership lists, client lists, and newsletter recipients to request participation in the survey. The survey ran from May 13, 2008 to June 3, 2008. No survey respondents were paid for their answers.

HCD Research adheres to the highest panel recruitment and management standards. Members are enrolled using online recruitment methods (email requests, online banners and blog ads), exclusively using permission-based techniques. The surveys were hosted on the HCD server. HCD Research maintained privacy and all answers have been stripped of any identifying information. No emails were collected from survey respondents.

A total sample size of **178 consultants** was obtained. The distribution across types of clients and years in business indicated below.

% of consultants who work for the following organizations	
Democratic candidates	60%
Republican candidates	35%
Independent candidates	21%
PACs or Trade Associations	31%
527 Committees	22%
Unions	28%
For-Profit businesses	34%
Not-For-Profit organizations	58%
Organizations outside the U.S.	8%

% of consultants with years experience in politics or public affairs	
Less than 1	4%
1-5	22%
6-15	30%
16-25	20%
26-35	13%
More than 35	11%

To recruit respondents for the **3rd 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 HCD's online panel. The survey ran from May 8, 2008 to May 28, 2008. No survey respondents were paid for their answers.

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.

There were a total of **4801** survey respondents in the sample. Some key points of distribution follow.
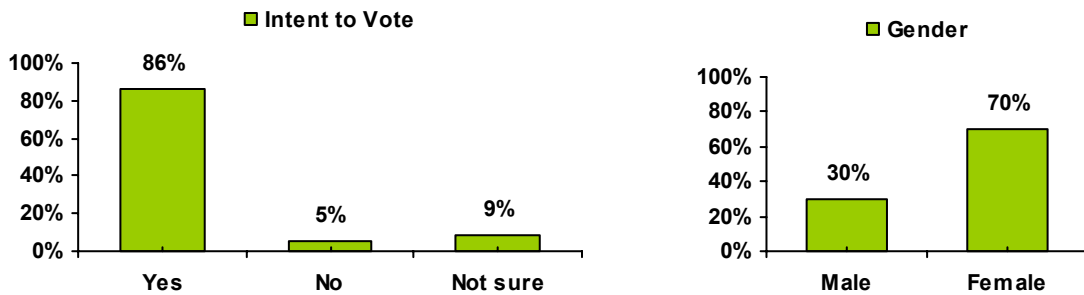
Age (by gender)			
Age	**Total**	**Males**	**Females**
18-24	10%	14%	8%
25-34	26%	28%	25%
35-54	49%	42%	52%
55-64	12%	12%	13%
65-74	2%	3%	2%
75+	1%	1%	1%
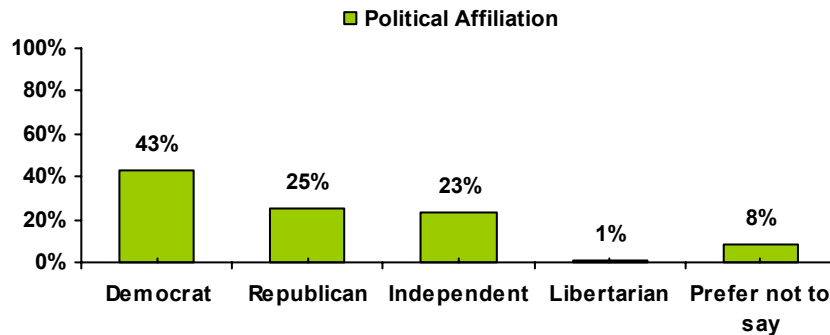
FINDINGS

1. **The vast majority of the consultants think the Internet is effective for reaching the loyal base now and certainly by 2012. Most are optimistic on the effectiveness of reaching swing, Independent and undecided voters with Internet technologies between now and 2012.**

When will the Internet be the determining factor in a successful campaign? We have asked some initial questions about Internet use but we are still need to better understand the ways in which consultants think the Internet makes a difference.

When the Internet will be the determining factor in clients' success in reaching		
Year	Loyal Base	Swing, Independent and Undecided Voters
Now (2008)	78%	52%
2012	16%	32%
2016	4%	10%
Never	2%	6%
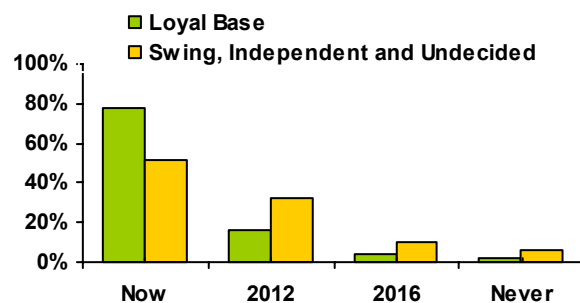
The historical view shows significant growth from 2006 to 2008 in the acceptance by consultants of the Internet for reaching the loyal base as well as the swing, Independent and undecided voters.

When the Internet will be the determining factor in clients' success in reaching						
	Loyal Base			Swing, Independent and Undecided Voters		
Year	2006 Consultants	2007 Consultants	2008 Consultants	2006 Consultants	2007 Consultants	2008 Consultants
2006	66%	N/A	N/A	32%	N/A	N/A
2008	23%	77%	78%	39%	53%	52%
2012	6%	18%	16%	16%	38%	32%
2016	1%	2%	4%	6%	4%	10%
Never	4%	3%	2%	6%	5%	6%

But still one third of the consultants have hesitations about using the Internet with interesting differences by party.

% consultants with and without hesitations for using the Internet for clients' political goals (by candidate organizations)				
	Total Consultants	Democratic Candidates	Republican Candidates	Independent Candidates
Hesitations	65%	64%	75%	76%
No hesitations	35%	36%	25%	24%

Primary hesitation with using the Internet for clients' political goals (by candidate organizations)				
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
Can not target accurately	13%	14%	21%	24%
Not enough information available about effectiveness	12%	10%	16%	16%
The people we are looking for are not online	8%	9%	5%	5%
Don't know how best to use it	7%	7%	11%	13%
Would recommend but client is hesitant	6%	6%	6%	3%
Not a reach medium	4%	5%	8%	8%
No reason to change from what I know works	4%	4%	5%	5%
Not a trusted medium	3%	3%	0%	3%
Security concerns	2%	1%	2%	0%
Takes too much time	1%	1%	0%	0%
Not an emotional medium	1%	2%	0%	0%
Too expensive	1%	1%	0%	0%

Looking at the length of time a consultant has been in the business reveals some relevant biases that might impact their use of the Internet.

Primary hesitation with using the Internet for clients' political goals (by years experience)						
	Less than 1 year	**1-5 years**	**6-15 years**	**16-25 years**	**26-35 years**	**More than 35 years**
Not a reach medium	0%	3%	4%	8%	9%	0%
Can not target accurately	0%	10%	8%	31%	9%	15%
The people we are looking for are not online	0%	15%	4%	6%	13%	5%
Too expensive	0%	3%	0%	0%	0%	0%
Would recommend but client is hesitant	14%	5%	8%	6%	4%	0%
Don't know how best to use it	14%	0%	4%	14%	4%	20%
Takes too much time	0%	3%	2%	0%	0%	0%
Not an emotional medium	0%	0%	2%	0%	4%	0%
Not a trusted medium	0%	3%	2%	3%	4%	10%
Not enough information available about effectiveness	0%	10%	23%	6%	9%	10%
Security concerns	0%	3%	0%	0%	0%	10%
No reason to change from what I know works	0%	3%	8%	3%	9%	0%
Other hesitation	0%	3%	2%	0%	4%	0%
No hesitations	71%	41%	36%	25%	30%	30%

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Primary hesitation with using the Internet for clients' political goals (historical comparison)			
	2006 Consultants	2007 Consultants	2008 Consultants
Can not target accurately	11%	14%	13%
Not enough information available about effectiveness	13%	9%	12%
The people we are looking for are not online	11%	14%	8%
Don't know how best to use it	9%	7%	7%
Would recommend but client is hesitant	6%	5%	6%
Not a reach medium	9%	4%	4%
No reason to change from what I know works	3%	3%	4%
Not a trusted medium	N/A	3%	3%
Security concerns	3%	0%	2%
Other hesitation	3%	3%	2%
Too expensive	1%	1%	1%
Takes too much time	1%	3%	1%
Not an emotional medium	3%	4%	1%
No hesitations	26%	28%	35%

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2. **The use of email is seen as the most effective way overall to reach loyal base voters, according to all consultants. Candidate web sites are seen as just about as effective as television and cable ads.**

Consultants perceive direct mail, candidate and surrogate events, phone, word of mouth, and television advertisements as effective traditional means for targeting loyal base voters.

Noted differences between party preferences are seen in the use of events, television ads, and phone being more popular with those working with Democrats. There is agreement across the parties on Internet tools, though those working with Democrats are more inclined to find email effective.

Most effective methods for reaching the <u>loyal base</u> - among consultants' top 3 (by candidate organizations)				
	Total Consultants	Democratic Candidates	Republican Candidates	Independent Candidates
E-mail	**46%**	**44%**	**38%**	**42%**
Direct mail	**38%**	**32%**	**54%**	**42%**
Events with candidate or surrogate	**37%**	**38%**	**35%**	**34%**
Phone	**29%**	**33%**	**24%**	**26%**
Word of mouth	**28%**	**25%**	**27%**	**21%**
TV/Cable ads	**26%**	**34%**	**25%**	**24%**
Candidate web site	**25%**	**28%**	**25%**	**29%**
Social networking sites	**10%**	**7%**	**10%**	**8%**
Debates	**9%**	**7%**	**8%**	**5%**
Blogs and podcasts	**8%**	**8%**	**8%**	**8%**
Radio ads	**8%**	**8%**	**10%**	**13%**
Online video	**7%**	**7%**	**6%**	**13%**
Online ads	**5%**	**5%**	**8%**	**5%**
Webcasts	**4%**	**4%**	**6%**	**13%**
Text messaging	**4%**	**6%**	**2%**	**3%**
Newspaper ads	**4%**	**4%**	**5%**	**3%**
Yard signs/outdoor billboards	**3%**	**4%**	**5%**	**3%**

Historical view of the most effective ways to reach the loyal base shows some significant shifts in attitudes about email with a 21% jump in interest by consultants from 2007 to 2008. Also noteworthy are the slight decreases in the perceived effectiveness of online ads and blogs and an increase in the sense that candidate web sites, social nets and webcasts are effective for this group. Perhaps after a bit of experimenting with these Internet tools there has been a reality check over early enthusiasm or maybe not enough has been spent to truly test effectiveness.

Most effective methods for reaching the loyal base - among consultants' top 3 (historical comparison)		
	2007 Consultants	2008 Consultants
Events with candidate or surrogate	37%	37%
TV/Cable ads	28%	26%
Direct mail	41%	38%
Radio ads	11%	8%
Phone	21%	29%
E-mail	38%	46%
Newspaper ads	6%	4%
Yard signs/outdoor billboards	8%	3%
Online ads	7%	5%
Candidate web site	23%	25%
Blogs and podcasts	12%	8%
Debates	13%	9%
Webcasts	3%	4%
Online video	7%	7%
Social networking sites	9%	10%
Text messaging	2%	4%
Word of mouth	27%	28%

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3. **Less than 25% of the consultants think candidate web sites and email are effective for reaching swing, Independent and undecided voters. This, however, is a 57% increase over interest expressed in 2007.**

Television ads, direct mail, debates, word of mouth and candidate events are seen as the best ways to reach swing, Independent and undecided voters.

Most effective methods for reaching swing, Independent and undecided voters - among consultants' top 3 (by candidate organizations)			
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
TV/Cable ads	52%	60%	48%	61%
Direct mail	37%	37%	48%	50%
Debates	31%	35%	29%	24%
Word of mouth	29%	26%	29%	26%
Events with candidate or surrogate	28%	26%	24%	26%
Candidate web site	22%	17%	21%	13%
Radio ads	16%	17%	24%	29%
Phone	16%	20%	13%	11%
E-mail	13%	12%	10%	8%
Online ads	11%	13%	8%	5%
Online video	11%	8%	13%	13%
Social networking sites	11%	7%	8%	5%
Newspaper ads	5%	4%	6%	5%
Yard signs/outdoor billboards	4%	6%	3%	5%
Blogs and podcasts	4%	4%	6%	5%
Webcasts	3%	0%	6%	8%
Text messaging	1%	0%	2%	3%

The historical view of reaching swing, Independent and undecided voters shows a 38% jump in the number of consultants thinking that online ads are effective with this group. Events with candidates and surrogates shows a noticeable increase though television and cable ads, direct mail and debates are still seen as the strongest tools for reaching swing, Independent and undecided voters.

Most effective methods for reaching <u>swing, Independent and undecided voters</u> - among consultants' top 3 (historical comparison)		
	2007 Consultants	**2008 Consultants**
TV/Cable ads	48%	52%
Direct mail	36%	37%
Debates	34%	31%
Word of mouth	30%	29%
Events with candidate or surrogate	25%	28%
Candidate web site	14%	22%
Radio ads	20%	16%
Phone	15%	16%
E-mail	11%	13%
Online ads	8%	11%
Online video	11%	11%
Social networking sites	8%	11%
Newspaper ads	7%	5%
Yard signs/outdoor billboards	10%	4%
Blogs and podcasts	9%	4%
Webcasts	3%	3%
Text messaging	2%	1%

4. Most consultants see steady growth of their clients' budgets dedicated to Internet purposes in the next eight years.

% of clients' budget to all Internet initiatives in each year			
	2008	**2012**	**2016**
0%	2%	2%	2%
1%	4%	1%	1%
2-3%	14%	4%	2%
4-5%	17%	10%	6%
6-10%	30%	16%	8%
11-20%	13%	33%	14%
21-30%	11%	18%	29%
31-50%	3%	11%	20%
51% +	4%	6%	18%

The historical view shows how the views of consultants have changed over time.

% of clients' budget to all Internet initiatives in each year (historical comparison)									
% of budget in	**2008**			**2012**			**2016**		
Consultants in…	**Total 2006**	**Total 2007**	**Total 2008**	**Total 2006**	**Total 2007**	**Total 2008**	**Total 2006**	**Total 2007**	**Total 2008**
0%	4%	1%	2%	4%	0%	2%	4%	0%	2%
1%	1%	8%	4%	4%	2%	1%	3%	2%	1%
2-3%	8%	9%	14%	4%	3%	4%	3%	1%	2%
4-5%	16%	18%	17%	18%	10%	10%	11%	5%	6%
6-10%	21%	27%	30%	25%	17%	16%	19%	11%	8%
11-20%	19%	19%	13%	22%	24%	33%	22%	15%	14%
21-30%	19%	11%	11%	15%	26%	18%	20%	23%	29%
31-50%	8%	6%	3%	8%	11%	11%	18%	25%	20%
51% +	5%	2%	4%	4%	7%	6%	4%	17%	18%

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When asked what should be included in this Internet budget there was general agreement of what does and does not belong in this budget. We suspect that media convergence, the move to the Internet of so much content and rising costs, including printing and postage rates, will turn all campaign budgets upside down.

% of consultants based on what to include in candidates' Internet budget (by candidate organizations)			
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
Web site development and maintenance	92%	93%	90%	89%
Creation of material for official web site or social network site	86%	84%	87%	84%
Email acquisition and matching	80%	79%	86%	84%
Creation of advertising specific to the web	72%	77%	70%	84%
Creation of video for posting on third party sites	72%	73%	78%	74%
Internet strategy consultants	65%	66%	65%	74%
Online display banners	63%	65%	63%	71%
Paid search	57%	61%	59%	58%
Online lead generation	55%	57%	48%	50%
Cost of creating television ads that are posted primarily on a candidate's site	50%	50%	54%	53%

5. The gap between what consultants are recommending versus what voters are expecting is hard to explain as the consultants themselves are using the Internet extensively except to play online games and to use Twitter.

Comparing what consultants think works best with the loyal base and swing voters to what voters expect candidates to do on the Internet reveals significant lag in acceptance by consultants of all web tools.

■ **Effective In Reaching Loyal Base (Among consultants' top 3)**
■ **Effective In Reaching Swing, Independent and Undecided Voters (Among consultants' top 3)**
■ **Voter Expectations (All that apply)**

	Email	Online ads	Candidate web site	Blogs and podcasts	Webcasts	Online video	Social networking sites
Loyal Base	46%	5%	25%	8%	4%	7%	10%
Swing	13%	11%	22%	4%	3%	11%	11%
Voter Expectations	60%	65%	87%	55%	62%	60%	38%

Looking at what consultants think works and what voters claim are the best way to get their attention shows that again consultants are missing some of the signs from voters about how to break through the media clutter in their lives.

Most noteworthy are underuse of yard signs, debates, and newspaper ads, and over reliance on phone and direct mail. On the Internet, consultants under-estimate the value of candidate web sites, online ads, and webcasts, and over-estimate the value of email.

It is also very revealing to see what consultants think works versus what people have done online related to politics. There is more evidence that consultants over-estimate the likelihood of getting opt-in emails and online contributions and under-estimate the interest voters have in finding information on their own. *Note that the consultants were limited to the top 3 most effective ways to reach voters while voters were able to select all that applied.*

Communication tools What consultants find most effective vs. what gets voters' attention			
	Effective for reaching loyal base (Among Top 3)	Effective for reaching swing and Independent (Among Top 3)	Voter say best ways to get their attention (All that apply)
TV/Cable ads	26%	52%	63%
Debates	9%	31%	57%
Candidate web site	25%	22%	51%
Word of mouth	28%	29%	39%
Direct mail	38%	37%	31%
Newspaper ads	4%	5%	29%
Radio ads	8%	16%	26%
Online ads	5%	11%	25%
Email	46%	13%	22%
Webcasts	4%	3%	20%
Yard signs/outdoor billboards	3%	4%	20%
Blogs and podcasts	8%	4%	16%
Social networking sites	10%	11%	15%
Online video	7%	11%	14%
Phone	29%	16%	9%

Political Activities What consultants find most effective vs. what voters have done			
	Effective for reaching loyal base (Among Top 3)	Effective for reaching swing and Independent (Among Top 3)	What voters have done (All that apply)
Visited a candidate web site	25%	22%	41%
Viewed online videos about candidates	7%	11%	40%
Read a blog about politics or candidates	8%	4%	27%
Clicked on an online political ad	5%	11%	18%
Submitted an email address in order to received candidate information	46%	13%	17%
Attended a political event	37%	28%	16%

Looking deeper at the skills of the political consultants we see a correlation between their use of the Internet and their interest in using the Internet for clients. Is this a question of just not enough education or a lack of interest in learning new skills? If the consultants don't use the tools, how can they recommend them?

What consultants have done (by hesitation level for candidates' use of the Internet and by candidate organizations)					
	Total Consultants	Consultants with Hesitations	Consultants with No Hesitations	Democratic Candidates	Republican Candidates	Independent Candidates
Use email	98%	97%	100%	98%	98%	100%
Social network member	69%	66%	74%	69%	62%	61%
Maintain a blog or your own web site	44%	42%	48%	46%	41%	50%
Post to other blogs	45%	41%	53%	41%	41%	42%
Post ratings or comments online	57%	53%	65%	57%	48%	39%
Subscribe to RSS feeds	45%	43%	48%	44%	41%	47%
Download video and/or audio	71%	68%	76%	74%	65%	71%
Use widgets	30%	25%	39%	27%	33%	32%
Upload video and/or audio	42%	36%	52%	36%	38%	45%
Listen to online radio	46%	41%	53%	47%	40%	39%
Forward links and email to friends/family	87%	85%	89%	86%	87%	97%
Play online games	21%	18%	26%	22%	16%	18%
Make online purchases	87%	83%	94%	87%	87%	84%
Use Twitter or other micro-blogging sites	20%	22%	16%	19%	22%	16%
Read newspapers or magazines online	92%	91%	94%	91%	90%	87%
Have broadband access to the Internet at home	88%	88%	89%	90%	90%	95%
Have wireless capability	76%	74%	79%	79%	71%	74%

6. **News-related sites are seen as most effective by consultants for incumbents to reach voters, and sites that attract younger voters are seen as most effective for challengers.**

Politically oriented sites, news sites, and search engines are seen as the most effective Internet sources to advertise about incumbent candidates. Sites appealing to young voters, social networking sites, political sites and blogs are believed to be most successful for advertising about challengers.

Best sites to promote incumbent candidates	
	Total Consultants
Political sites	30%
Newspaper sites	24%
Search engines	23%
TV, radio, or cable related sites	22%
Sites that appeal to older voters	21%
Sites that appeal to younger voters	20%
Large portal sites with mass audience	16%
Blogs	16%
Social networking sites	16%
Online video sites	16%
Male oriented sites	14%
Sites based on ethnicity	13%
Female oriented sites	12%
Sites based on religious interests	11%
General interest sites like travel, weather, entertainment, lifestyle	9%

Best sites to promote challengers	
	Total Consultants
Sites that appeal to younger voters	30%
Social networking sites	29%
Political sites	26%
Blogs	26%
Search engines	24%
Online video sites	23%
Newspaper sites	22%
Large portal sites with mass audience	19%
TV, radio, or cable related sites	18%
Female oriented sites	17%
Sites based on ethnicity	16%
Sites that appeal to older voters	15%
Male oriented sites	11%
Sites based on religious interests	11%
General interest sites like travel, weather, entertainment, lifestyle	10%

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Looking by party affiliation there are some interesting differences when it comes to the perception of effectiveness of female oriented sites, blogs and social network sites.

Best sites to promote for each type of candidate (by candidate organizations)						
	Incumbents			Challengers		
	Democratic Candidates	Republican Candidates	Independent Candidates	Democratic Candidates	Republican Candidates	Independent Candidates
Newspaper sites	28%	22%	24%	26%	21%	16%
TV, radio, or cable related sites	28%	19%	26%	23%	14%	18%
Large portal sites with mass audience	15%	14%	18%	20%	16%	21%
Search engines	22%	24%	24%	18%	30%	18%
Political sites	32%	30%	29%	29%	27%	29%
General interest sites like travel, weather, entertainment, lifestyle	10%	11%	13%	11%	10%	13%
Female oriented sites	16%	10%	16%	20%	16%	13%
Male oriented sites	18%	13%	18%	14%	11%	16%
Sites that appeal to younger voters	21%	22%	26%	34%	33%	29%
Sites that appeal to older voters	23%	16%	24%	16%	14%	16%
Sites based on ethnicity	16%	13%	16%	16%	17%	13%
Sites based on religious interests	12%	13%	13%	14%	10%	11%
Blogs	15%	19%	24%	28%	30%	26%
Social networking sites	16%	14%	18%	28%	25%	34%
Online video sites	16%	16%	21%	24%	25%	24%

Political sites have grown in popularity since 2006 for communicating about an incumbent candidate. Interest has grown for some niche sites while interest in newspaper, television, radio and cable related sites have declined.

Best sites to promote <u>incumbent candidates</u> (historical comparison)			
	2006 Consultants	**2007 Consultants**	**2008 Consultants**
Political sites	25%	28%	30%
Newspaper sites	26%	34%	24%
Search engines	15%	19%	23%
TV, radio, or cable related sites	25%	27%	22%
Sites that appeal to older voters	15%	23%	21%
Sites that appeal to younger voters	12%	14%	20%
Large portal sites with mass audience	15%	18%	16%
Blogs	17%	18%	16%
Social networking sites	N/A	17%	16%
Online video sites	N/A	17%	16%
Male oriented sites	12%	13%	14%
Sites based on ethnicity	N/A	13%	13%
Female oriented sites	11%	13%	12%
Sites based on religious interests	15%	15%	11%
General interest sites like travel, weather, entertainment, lifestyle	10%	15%	9%

For reaching voters to inform them about challengers, consultants are showing increasing comfort with sites that attract younger voters and social networks. Again there is decreased interest in newspaper, television, radio, and cable related sites.

Best sites to promote <u>challengers</u> (historical comparison)			
	2006 Consultants	**2007 Consultants**	**2008 Consultants**
Sites that appeal to younger voters	25%	29%	30%
Social networking sites	N/A	23%	29%
Political sites	28%	29%	26%
Blogs	26%	27%	26%
Search engines	20%	23%	24%
Online video sites	N/A	23%	23%
Newspaper sites	19%	31%	22%
Large portal sites with mass audience	18%	21%	19%
TV, radio, or cable related sites	20%	30%	18%
Female oriented sites	15%	20%	17%
Sites based on ethnicity	N/A	19%	16%
Sites that appeal to older voters	10%	19%	15%
Male oriented sites	10%	13%	11%
Sites based on religious interests	17%	12%	11%
General interest sites like travel, weather, entertainment, lifestyle	8%	15%	10%

7. **Nine out of ten consultants think that the Internet successfully addresses fundraising and volunteer recruitment with the loyal base, while three out of five consultants see the Internet effective for increasing name recognition with swing, Independent and undecided voters.**

Consultants believe that the most effective uses of the Internet for reaching the loyal base are fundraising, recruiting volunteers, announcing events, and rapid response. Name recognition and persuasion are seen as the most advantageous uses of the Internet to reach swing, Independent and undecided voters.

Constituents best addressed by the Internet to achieve each goal				
Goal:	Loyal Base	Swing and Crossover Voters	Independent Voters	Undecided Voters
Fundraising	**94%**	35%	28%	15%
GOTV	77%	47%	37%	28%
Identify Potential Voters	35%	61%	58%	51%
Build Contact Lists	78%	57%	47%	34%
Persuasion	27%	**67%**	**59%**	**56%**
Name Recognition	40%	**70%**	**63%**	**67%**
Impact Favorability	47%	57%	50%	51%
Rapid Response	83%	38%	30%	30%
Build Relationships	66%	54%	44%	34%
Recruit Volunteers	**92%**	29%	20%	10%
Announce Events	88%	52%	42%	40%
Build Momentum	69%	45%	39%	31%

There are distinct differences in the way that those who work with Democrats and those who work with Republicans see the use of the Internet. The Democrats are 50% more likely than the Republicans to use the Internet to identify potential voters in the loyal base and use the Internet for rapid response to reach undecided voters. On the other hand, Republicans are 28% more likely to use the Internet to build relationships with Independent voters.

| Constituents for goals where consultants of Democratic and Republican candidates disagree the most		
	Democratic Candidates	Republican Candidates
Identify Potential Voters: *Loyal Base*	36%	24%
Persuasion *Independent Voters*	64%	54%
Rapid Response *Undecided Voters*	36%	25%
Build Relationships *Independent Voters*	40%	51%

8. Further specifics about reaching certain demographic and ethnic groups illustrate some potential biases that may be influencing how candidates view likely voters.

Consultants consider the Internet a good way to reach liberal activists more so than social conservatives.

Methods effective in reaching <u>liberal activists</u> (by 2008 candidate organizations and a historical comparison)					
	Democratic Candidates 08	Republican Candidates 08	Independent Candidates 08	2007 All Consultants	2008 All Consultants
E-mail	93%	79%	82%	76%	88%
Candidate web site	81%	76%	87%	74%	79%
Social networking sites	79%	71%	84%	65%	77%
Blogs and podcasts	78%	73%	76%	77%	75%
Events with candidate or surrogate	80%	68%	74%	75%	74%
Online video	72%	75%	74%	72%	73%
Online ads	71%	63%	76%	64%	69%
Word of mouth	70%	68%	76%	66%	67%
Debates	70%	60%	66%	70%	66%
Webcasts	64%	62%	66%	63%	65%
Text messaging	58%	60%	61%	53%	58%
Direct mail	59%	54%	63%	61%	54%
TV/Cable ads	57%	44%	63%	62%	52%
Phone	56%	40%	55%	51%	49%
Radio ads	50%	44%	66%	40%	46%
Newspaper ads	44%	38%	45%	42%	43%
Yard signs/outdoor billboards	42%	25%	42%	38%	36%

Methods effective in reaching <u>social conservatives</u> (by 2008 candidate organizations and a historical comparison)					
	Democratic Candidates 08	Republican Candidates 08	Independent Candidates 08	2007 All Consultants	2008 All Consultants
Radio ads	71%	68%	74%	71%	70%
Events with candidate or surrogate	68%	76%	82%	76%	69%
E-mail	67%	71%	71%	63%	67%
Candidate web site	69%	70%	79%	65%	66%
Direct mail	64%	63%	58%	74%	62%
Debates	68%	62%	74%	75%	62%
TV/Cable ads	70%	59%	63%	70%	61%
Word of mouth	61%	65%	68%	66%	61%
Phone	64%	51%	58%	59%	56%
Newspaper ads	49%	43%	42%	62%	48%
Blogs and podcasts	50%	51%	71%	47%	47%
Online ads	50%	43%	55%	51%	45%
Yard signs/outdoor billboards	44%	43%	45%	50%	43%
Online video	41%	49%	50%	46%	43%
Social networking sites	39%	54%	58%	33%	43%
Webcasts	33%	37%	37%	40%	34%
Text messaging	19%	14%	21%	21%	19%

2008 Measure of Effectiveness of Online Tools for Reaching
<u>**Liberal Activists vs. Social Conservatives**</u>
**% Of Consultants**
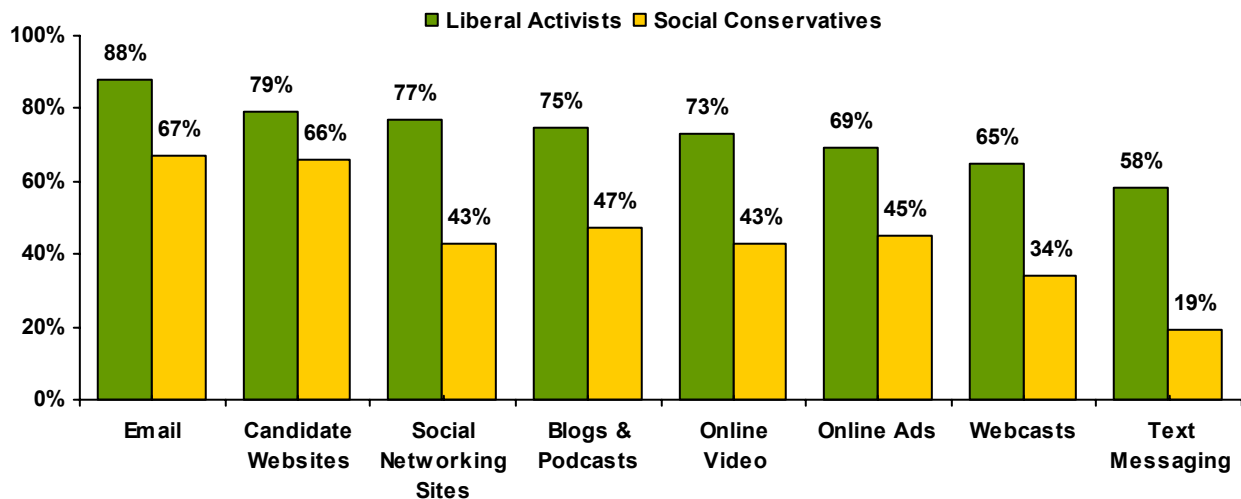
Comparing how consultants view reaching blue collar workers, African Americans, and Hispanics reveals that the Internet is not seen as a strong tool for reaching any of these groups though candidate web sites and email are seen as important. Do the consultants really understand the online habits of these groups or are they making assumptions?

Methods effective in reaching <u>blue collar workers</u> (by candidate organizations)				
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
Direct mail	69%	73%	68%	74%
TV/Cable ads	67%	73%	60%	61%
Word of mouth	66%	66%	70%	74%
Radio ads	63%	66%	62%	61%
Phone	62%	65%	54%	66%
Events with candidate or surrogate	57%	59%	56%	53%
Yard signs/outdoor billboards	53%	56%	49%	61%
Debates	39%	41%	38%	32%
Newspaper ads	38%	37%	35%	34%
Candidate web site	38%	45%	33%	47%
E-mail	35%	34%	40%	39%
Online ads	19%	21%	22%	29%
Social networking sites	19%	19%	17%	26%
Online video	18%	20%	22%	29%
Blogs and podcasts	12%	12%	8%	18%
Webcasts	11%	12%	14%	21%
Text messaging	10%	10%	6%	11%

Methods effective in reaching <u>African Americans</u> (by candidate organizations)				
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
Word of mouth	69%	69%	70%	68%
TV/Cable ads	63%	70%	60%	63%
Radio ads	60%	64%	62%	63%
Events with candidate or surrogate	58%	64%	49%	53%
Direct mail	53%	59%	49%	58%
Phone	51%	59%	40%	50%
Yard signs/outdoor billboards	47%	49%	48%	53%
Candidate web site	43%	51%	41%	58%
E-mail	40%	40%	43%	42%
Debates	35%	42%	29%	29%
Social networking sites	29%	31%	29%	37%
Online video	28%	28%	33%	37%
Online ads	25%	29%	32%	32%
Newspaper ads	23%	24%	21%	16%
Text messaging	20%	22%	17%	26%
Blogs and podcasts	13%	17%	10%	21%
Webcasts	11%	12%	16%	21%

Methods effective in reaching **Latinos/Hispanics** (by 2008 candidate organizations and a historical comparison)				
	Democratic Candidates	**Republican Candidates**	**Independent Candidates**	**2007 Consultants**	**2008 Consultants**
Word of mouth	69%	68%	71%	73%	69%
TV/Cable ads	72%	57%	61%	69%	65%
Radio ads	65%	59%	63%	60%	60%
Direct mail	63%	51%	66%	56%	57%
Events with candidate or surrogate	58%	51%	61%	63%	54%
Phone	62%	41%	50%	44%	53%
Yard signs/outdoor billboards	48%	41%	50%	47%	44%
Candidate web site	51%	41%	58%	36%	42%
E-mail	42%	41%	47%	31%	41%
Debates	39%	27%	29%	33%	34%
Newspaper ads	36%	32%	34%	34%	33%
Social networking sites	36%	30%	34%	23%	31%
Online ads	33%	38%	45%	23%	29%
Online video	30%	35%	39%	23%	29%
Text messaging	23%	22%	29%	17%	24%
Blogs and podcasts	20%	13%	24%	14%	17%
Webcasts	13%	17%	29%	13%	12%

**2008 Measure of Effectiveness of Online Tools for Reaching
Latinos/Hispanics vs. African Americans vs. Blue Collar Workers
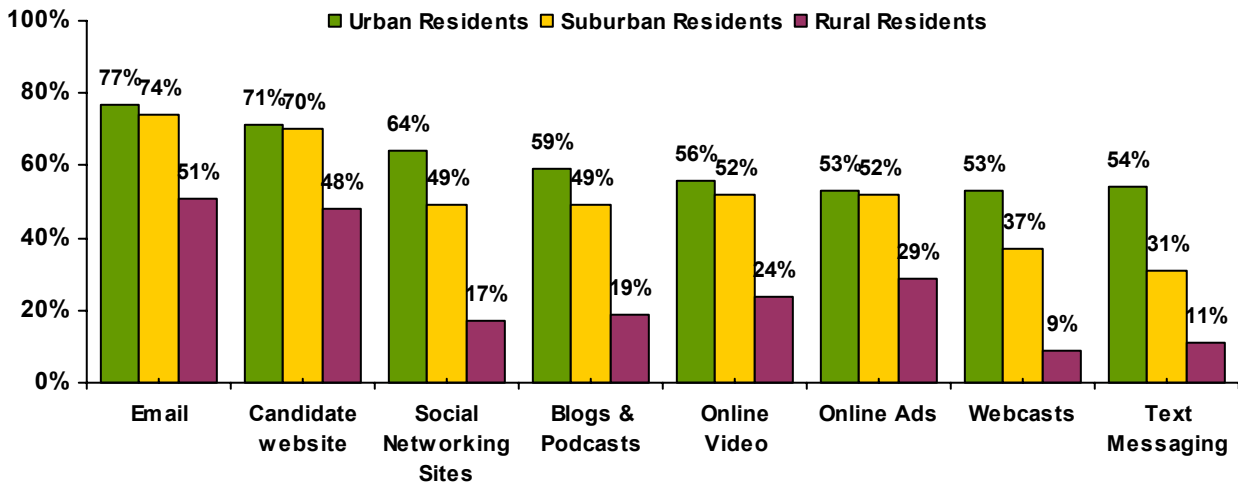% Of Consultants**
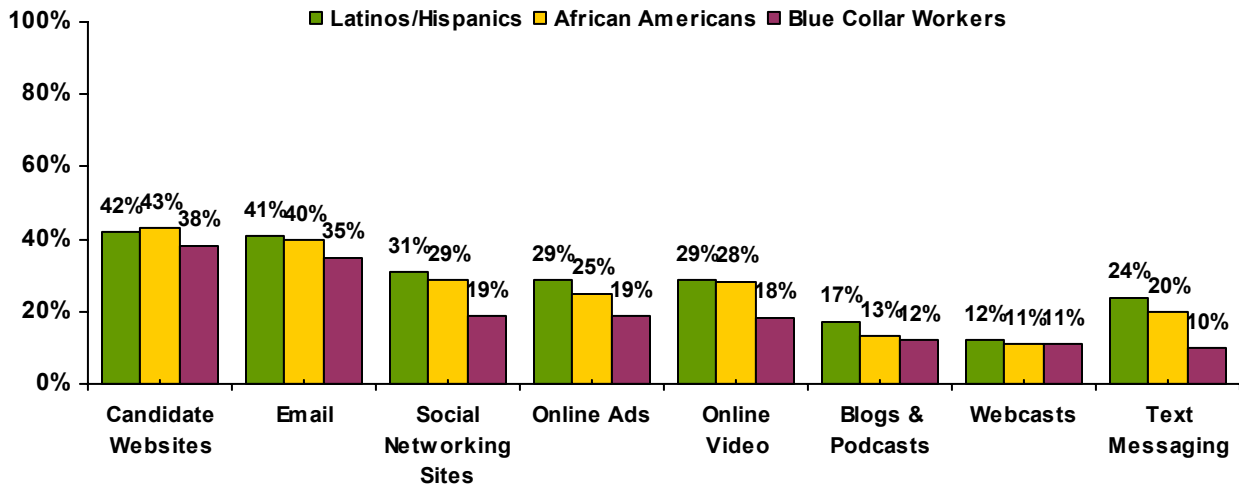
Looking at voters geographically reveals a different sense of who might be influenced by the Internet with a strong impact seen in urban areas and almost as much power in suburban areas.

Methods effective in reaching urban residents (by candidate organizations)				
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
E-mail	**77%**	**74%**	**81%**	**82%**
Candidate web site	**71%**	**74%**	**75%**	**79%**
TV/Cable ads	65%	76%	62%	76%
Events with candidate or surrogate	65%	69%	62%	61%
Social networking sites	**64%**	**65%**	**65%**	**66%**
Word of mouth	61%	66%	60%	61%
Debates	60%	65%	62%	63%
Blogs and podcasts	**59%**	**60%**	**60%**	**63%**
Online video	**56%**	**61%**	**60%**	**68%**
Radio ads	54%	60%	52%	61%
Text messaging	**54%**	**52%**	**57%**	**53%**
Online ads	**53%**	**56%**	**54%**	**50%**
Webcasts	**53%**	**54%**	**52%**	**61%**
Direct mail	51%	58%	49%	55%
Phone	45%	56%	38%	53%
Newspaper ads	40%	45%	35%	47%
Yard signs/outdoor billboards	35%	37%	32%	45%

Methods effective in reaching suburban residents (by candidate organizations)				
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
E-mail	**74%**	**72%**	**78%**	**79%**
TV/Cable ads	71%	79%	70%	76%
Candidate web site	**70%**	**71%**	**76%**	**71%**
Events with candidate or surrogate	65%	66%	65%	66%
Radio ads	62%	69%	62%	68%
Direct mail	62%	66%	65%	61%
Word of mouth	60%	63%	63%	66%
Yard signs/outdoor billboards	60%	60%	60%	63%
Debates	58%	61%	60%	61%
Phone	56%	64%	44%	55%
Online ads	**52%**	**54%**	**49%**	**42%**
Online video	**52%**	**57%**	**52%**	**61%**
Blogs and podcasts	**49%**	**50%**	**48%**	**58%**
Social networking sites	**49%**	**53%**	**40%**	**50%**
Newspaper ads	43%	48%	43%	50%
Webcasts	**37%**	**38%**	**35%**	**45%**
Text messaging	**31%**	**31%**	**25%**	**34%**

Methods effective in reaching <u>rural residents</u> (by candidate organizations)				
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
Direct mail	**72%**	**75%**	**70%**	**71%**
Radio ads	**71%**	**75%**	**70%**	**71%**
Word of mouth	**70%**	**71%**	**68%**	**76%**
TV/Cable ads	**69%**	**73%**	**68%**	**71%**
Phone	**62%**	**67%**	**57%**	**66%**
Events with candidate or surrogate	**57%**	**59%**	**57%**	**63%**
Yard signs/outdoor billboards	**56%**	**57%**	**54%**	**61%**
Debates	**56%**	**60%**	**57%**	**50%**
E-mail	**51%**	**50%**	**63%**	**63%**
Newspaper ads	**51%**	**49%**	**57%**	**50%**
Candidate web site	**48%**	**56%**	**46%**	**42%**
Online ads	**29%**	**31%**	**30%**	**24%**
Online video	**24%**	**32%**	**21%**	**37%**
Blogs and podcasts	**19%**	**21%**	**16%**	**21%**
Social networking sites	**17%**	**19%**	**11%**	**13%**
Text messaging	**11%**	**11%**	**10%**	**16%**
Webcasts	**9%**	**9%**	**8%**	**11%**

2008 Measure of Effectiveness of Online Tools for Reaching
<u>Urban vs. Suburban vs. Rural Residents</u>
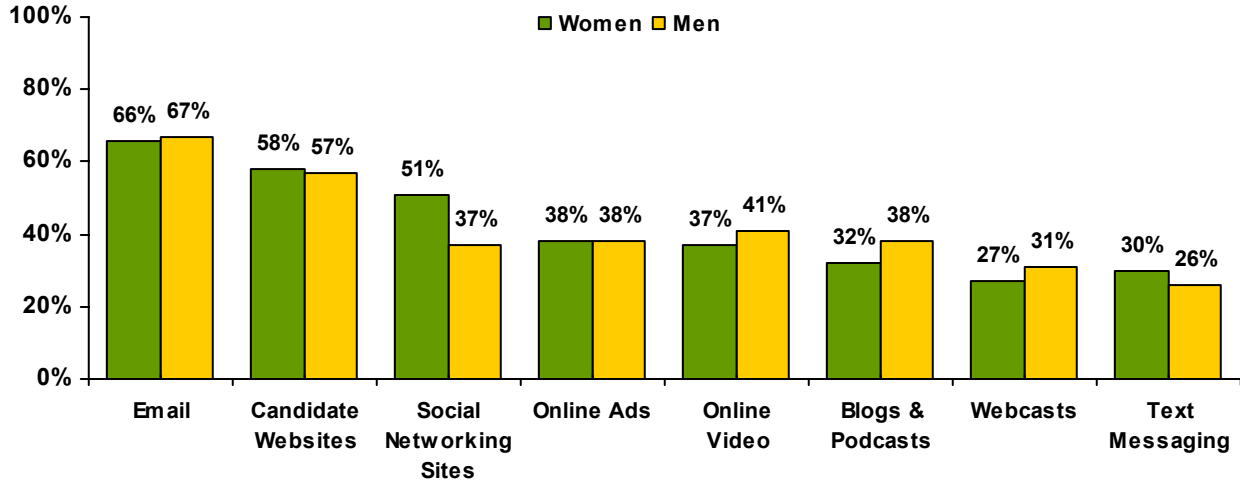**% Of Consultants**

Consultants indicate that Internet tools affect men and women equally, with some disagreement between those who work with Democratic candidates and those who work with Republican and Independent candidates.

Methods effective in reaching <u>men</u> (by candidate organizations)				
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
E-mail	**67%**	**65%**	**76%**	**74%**
Word of mouth	**59%**	**62%**	**57%**	**63%**
Events with candidate or surrogate	**58%**	**61%**	**54%**	**55%**
TV/Cable ads	**58%**	**64%**	**54%**	**66%**
Candidate web site	**57%**	**64%**	**56%**	**53%**
Direct mail	**54%**	**59%**	**51%**	**58%**
Radio ads	**54%**	**58%**	**51%**	**61%**
Debates	**53%**	**57%**	**49%**	**42%**
Phone	**42%**	**50%**	**37%**	**45%**
Online video	**41%**	**47%**	**44%**	**45%**
Newspaper ads	**39%**	**41%**	**37%**	**45%**
Online ads	**38%**	**43%**	**43%**	**34%**
Blogs and podcasts	**38%**	**41%**	**40%**	**37%**
Yard signs/outdoor billboards	**38%**	**42%**	**33%**	**50%**
Social networking sites	**37%**	**41%**	**32%**	**34%**
Webcasts	**31%**	**36%**	**30%**	**32%**
Text messaging	**26%**	**27%**	**29%**	**29%**

Methods effective in reaching <u>women</u> (by candidate organizations)				
	Total Consultants	**Democratic Candidates**	**Republican Candidates**	**Independent Candidates**
E-mail	**66%**	**66%**	**73%**	**74%**
Word of mouth	**65%**	**68%**	**67%**	**66%**
Events with candidate or surrogate	**62%**	**65%**	**59%**	**55%**
TV/Cable ads	**59%**	**65%**	**60%**	**68%**
Candidate web site	**58%**	**64%**	**57%**	**47%**
Direct mail	**57%**	**64%**	**52%**	**63%**
Debates	**54%**	**56%**	**56%**	**42%**
Social networking sites	**51%**	**53%**	**49%**	**45%**
Phone	**49%**	**59%**	**40%**	**47%**
Radio ads	**49%**	**55%**	**48%**	**53%**
Online ads	**38%**	**44%**	**40%**	**34%**
Yard signs/outdoor billboards	**37%**	**41%**	**35%**	**50%**
Online video	**37%**	**46%**	**37%**	**39%**
Blogs and podcasts	**32%**	**35%**	**27%**	**26%**
Newspaper ads	**31%**	**36%**	**30%**	**42%**
Text messaging	**30%**	**31%**	**30%**	**34%**
Webcasts	**27%**	**27%**	**25%**	**24%**

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2008 Measure of Effectiveness of Online Tools for Reaching
Women vs. Men
% Of Consultants

We predict that additional research on desirable voting groups such as Hispanics and African-Americans, as well as voters in general, will help political consultants make more informed decisions about spending campaign dollars on Internet options as well as television, direct mail, and phone banks. E-Voter Institute will continue to shed light on the changing nature of political campaigns and how the Internet can be used effectively to meet campaign goals such as raising funds, persuading voters, and getting out the vote.

COMMENTARY

Online Persuasion:
Moving Undecideds to Supporters Using Internet Advertising

Peter D. Greenberger
Elections & Issue Advocacy I Google, Inc.

The 2008 Presidential campaign has proven the effectiveness of using the Internet to recruit supporters. Vast email lists of frequent small dollar contributors, robust social networking sites populated by eager friends and supporters, and FEC reports detailing the growing campaign investments to online search and advertising (Obama's February filing indicated $1 million dedicated to Google alone) attest to the power of this medium to reach a campaign's base. There will always be digital doubters but there will never be another presidential campaign that does not model itself after this year's groundbreaking Internet leaders especially in the race to grow lists of supporters online. The E-Voter Institute Consultants Survey confirms this new reality: over 90% of consultants agree that the most effective uses of the Internet with regard to the base are fundraising and volunteer recruitment.

The online supporter, like the consumer, flows through a direct response marketing continuum when deciding to lend support to a candidate. First there is awareness of the candidate, and then some level of engagement (visiting the candidate's website or reading articles online) followed by a period of consideration. Finally, there is conversion and the voter signs up, contributes money or takes another proactive action. Online search, often initiated by offline events and advertising, is the ideal method for moving motivated voters through this funnel and converting them into bona fide supporters. Persuading new voters, true undecideds, and even apathetic users to initiate this process is more challenging but ultimately more rewarding. Signing up a supporter will always be easier than convincing the skeptics. But it will be the small sliver of undecided skeptics who determine the outcome of the election. The digital solution to reach this coveted audience is by using online display advertising - text, image and video - to persuade targeted audiences to enter the presidential decision-making funnel. Now that we are past the primaries, we expect to see a slow but incremental increase in the amount of political ad dollars flowing to online persuasion. The E-Voter survey again confirms this trend, revealing that consultants view the Internet as a successful persuasion tool with swing and undecided voters – second only to its ability to raise name recognition among this same voting bloc.

In the days of three broadcast networks, newspapers with growing subscription lists, and a limited number of advertiser-supported radio stations it was relatively simple to reach a mass audience. Audiences have since fragmented across numerous networks, channels and media platforms and it takes a more complex media mix to reach the same numbers of people. According to a JupiterResearch study, Americans now spend the same amount

of time online as they do watching television. However, political advertising budgets have not reflected this shift - 2004 saw just .8% of all federal campaign dollars spent online; optimistic third party projections for 2008 are that this number will double or triple. Growing, yes, but not keeping up with the audience. This reluctance is especially curious when considering the distinct advantages of online advertising when compared to traditional forms of advertising: the viewer is just inches from the screen; the message can be finely targeted to the user depending on the website; the ads for the most part cannot be recorded and skipped by the viewer; the viewer can interact, respond to and even share the ad with friends; the advertiser can easily measure user interaction with the ad to determine the effectiveness of the creative; and, in many cases, the advertiser only pays on confirmed views or clicks. Why, then, is there such a hesitancy among the consulting class to shift persuasion budgets online?

The discrepancy between where political campaigns spend money and where voters actually spend time can be explained in a few ways. Certainly there is a disconnect, often generational, between the campaign decision makers and the electorate. The media landscape has shifted dramatically since the days when most senior political consultants cut their teeth on their first campaign - a previously finite number of media alternatives have mushroomed into multiple media and entertainment platforms ranging from 100-plus cable networks, to satellite radio, iPods, and the Internet. Experienced campaign consultants understandably gravitate to methods and strategies that have worked in the past and with which they are more comfortable. A cynic might note that there are entrenched interests who benefit from the current system of media buying and are threatened by a more accountable, efficient way to reach voters. A more generous and fair explanation is that branding or persuasion messaging on the Internet is relatively new and yet to be proven decisive in a political campaign. In some ways, the Internet is a victim of its own success - campaigns insist that display and video ads perform as well as search advertising in recruiting new supporters. The comparison should not be between search and display, but between display and other forms of persuasion communication (television, radio, mail and phones). Television remains a potent tool for changing public opinion, but it does not make sense to apply more money to a medium that reaches fewer viewers.

There are as many ways to reach and persuade voters online as there are websites and display advertising formats. Websites can be sliced and diced helping campaigns reach key constituencies with messages specifically tailored to readers of certain mainstream and niche content. Additionally, advertisers can choose from do-it-yourself text ads of a just a few lines and a url, to image, flash and even video ads. In many cases the ads can be targeted contextually, appearing alongside relevant material, as well as placed on specific sites and categories of sites reaching targeted audiences. Online ads can also be geo-targeted, appearing only on the screens of constituents in certain designated cities, states or regions. To date, banners and flash ads have received the most attention; look for a growth in the use of video ads across the Internet as well as on top video sites such as YouTube in the months ahead. Video ads allow the advertiser to engage with targeted, interested audiences as well as to experiment with a variety of video content, formats and

length. As campaigns realize that online video ads must be different from the spots created for television, we will see a new generation of media consultants fluent in both video mediums.

As with every other strategic consideration of a political campaign, the question of the bottom line is paramount. What should a campaign spend online? Today corporate America dedicates between five and ten percent of all advertising dollars to the Internet, according to a 2007 eMarketer report. Approximately half goes towards search for direct response marketing. Political advertisers, following this model, should consider putting half of their digital communications budget towards the text, image and video ads intended to reach the undecided voters who will determine this election.

Campaigns know that the first vote they get is the cheapest - the supporter whose vote they already have - and the last vote they get is the most expensive. Search advertising on the Internet has revolutionized the way campaigns capture those early supporters; persuasion advertising online will help make that last vote more affordable.

CONTACT INFORMATION

We look forward to your feedback about ways to improve future surveys. Send comments or requests for more information to:

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President
E-Voter Institute
karen@e-voterinstitute.com

Sign up for our mailing list at:
http://e-voterinstitute.com

APPENDICES

- **APPENDIX A:**
  Questions for the E-Voter Institute's 7th Annual Survey of Political and Advocacy Communication Leaders

- **APPENDIX B:**
  Questions for the E-Voter Institute's 3rd Annual Voter Expectations Survey

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APPENDIX A: E-Voter Institute's 7th Annual Survey of Political and Advocacy Communications Leaders (2008)

1. Which methods are most effective for candidates and advocates to reach and persuade <u>"Loyal base" voters</u>? Please select the top THREE most effective methods.
   - ❑ Events with candidate or surrogate
   - ❑ 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. 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 or surrogate
   - ❑ 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) _____

3. 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

4. If you bought or are managing an online ad campaign and/or promotion in 2008, 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 2008		

5. Please indicate which of the following constituencies are best addressed by using the Internet to achieve the campaign's goals. Check all that apply.

Conducted on the Internet	Loyal Base	Swing and Crossover Voters	Independent Voters	Undecided Voters	None of these
Fund raising					
Get out the vote					
Identify potential voters					
Build candidate contact lists					
Persuasion					
Rapid response					
Build relationships					
Recruit volunteers					
Announce events					
Name recognition					
Build momentum					
Impact favorability					

6. Select the characteristics that best describe you. Check all that apply.
    - ❏ Use email
    - ❏ Social network member (For example: LinkedIn, Facebook, myspace.com)
    - ❏ Maintain a blog or your own web site
    - ❏ Post to other blogs
    - ❏ Post ratings or comments online
    - ❏ Subscribe to RSS feeds
    - ❏ Download video and/or audio
    - ❏ Use widgets
    - ❏ Upload video and/or audio
    - ❏ Listen to online radio
    - ❏ Forward links and email to friends/family
    - ❏ Play online games
    - ❏ Make online purchases of consumer goods, travel or subscriptions
    - ❏ Use Twitter or other micro-blogging sites
    - ❏ Read newspapers or magazines online
    - ❏ Have broadband access to the Internet at home
    - ❏ Have wireless capability
    - ❏ None of the above

7. How often do you check your email?
   - ❑ Multiple times per day
   - ❑ Daily
   - ❑ Weekly
   - ❑ Monthly
   - ❑ Less often than once a month

8. How often do you update your social network page(s)?
   - ❑ Multiple times per day
   - ❑ Daily
   - ❑ Weekly
   - ❑ Monthly
   - ❑ Less often than once a month

8b. What social networks are you a member of? Check all that apply.
   - ☐ Facebook
   - ☐ MySpace
   - ☐ LinkedIn
   - ☐ Eventful
   - ☐ Live Journal
   - ☐ Twitter
   - ☐ Digg
   - ☐ Other (Please Specify) _____

9. When, if at all, do you think the Internet will be the determining factor in your client's success in achieving the following political/communications goals:

Activity For Which The Internet Is The Determining Factor In Clients' Success	Now	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?

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

11. What should be included in a candidate's Internet media budget? Check all that apply.
   - ❑ Paid search
   - ❑ Online display banners
   - ❑ Creation of advertising specific to the web
   - ❑ Internet strategy consultants
   - ❑ Creation of video for posting on third party sites
   - ❑ Web site development and maintenance
   - ❑ Creation of material for official web site or social network site
   - ❑ Online lead generation
   - ❑ Email acquisition and matching
   - ❑ Cost of creating television ads that are posted primarily on a candidate's site
   - ❑ Other (Please Specify) _____

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

	Liberal Activists	Social Conservatives	Latinos/ Hispanics	Blue Collar Workers	African Americans
Events with candidate or surrogate					
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) _____					

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

	Urban	Suburban	Rural	Men	Women
Events with candidate or surrogate					
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) _____					

14. 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) _____

15. 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

APPENDIX B: E-Voter Institute's 3rd Annual Voter Expectations Survey (2008)

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 web 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 from candidate or celebrity endorser
   - ❑ Newspaper ads
   - ❑ Social networking sites
   - ❑ Phone
   - ❑ Official web site
   - ❑ Viral video about a candidate
   - ❑ Radio ads
   - ❑ Webcasts
   - ❑ Debates
   - ❑ Independent blog posting
   - ❑ 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
   - ❑ Debates
   - ❑ Magazines
   - ❑ Blogs
   - ❑ Books
   - ❑ People from work
   - ❑ Other (Please Specify) _____

4. Which of the following have you done? Check all that apply.
   - ❑ Donated to a candidate or cause online
   - ❑ Submitted an email address in order to received candidate information
   - ❑ Searched online for additional information about politics
   - ❑ Clicked on an online political ad
   - ❑ Attended a political event
   - ❑ Volunteered for a political campaign
   - ❑ Told a friend or family to vote for a candidate or initiative
   - ❑ Forwarded links or email to friends/family about political issues
   - ❑ Participated in an online discussion about politics
   - ❑ Visited a candidate's web site
   - ❑ Read a blog about politics or candidates
   - ❑ Viewed online videos about candidates
   - ❑ Received email from friends or family about politics
   - ❑ Sent an email to a candidate or politician about your concerns
   - ❑ None of the above

5. What has the most effect on your decision about who to vote for?
   - ❑ Who my family votes for
   - ❑ Internet information
   - ❑ Television
   - ❑ Newspaper editorials
   - ❑ Recommendations from my political party
   - ❑ Friends
   - ❑ Direct mail
   - ❑ Phone calls from campaign volunteers
   - ❑ Endorsements
   - ❑ Other (Please Specify) _____

6. What best describes your use of online technology?
   - ❑ Power User - Staying on the leading edge of the Internet
   - ❑ Advanced - Maintaining awareness of changes in online technology
   - ❑ Competent - Satisfied with basic online technology to get the job done
   - ❑ Novice - Limited ability to take advantage of all online technology

7. Select the characteristics that best describe you. Check all that apply.
   - ❑ Use email
   - ❑ Social network member (For example: LinkedIn, Facebook, myspace.com)
   - ❑ Maintain a blog or your own web site
   - ❑ Post to other blogs
   - ❑ Post ratings or comments online
   - ❑ Subscribe to RSS feeds
   - ❑ Download video and/or audio
   - ❑ Use widgets
   - ❑ Upload video and/or audio
   - ❑ Listen to online radio
   - ❑ Forward links and email to friends/family
   - ❑ Play online games
   - ❑ Make online purchases of consumer goods, travel or subscriptions
   - ❑ Use Twitter or other micro-blogging sites
   - ❑ Read newspapers or magazines online
   - ❑ Have broadband access to the Internet at home
   - ❑ Have wireless capability
   - ❑ None of the above

8. How often do you check your email?
   - ❑ Multiple times per day
   - ❑ Daily
   - ❑ Weekly
   - ❑ Monthly
   - ❑ Less often than once a month

9. How often do you update your social network page(s)?
   - ❑ Multiple times per day
   - ❑ Daily
   - ❑ Weekly
   - ❑ Monthly
   - ❑ Less often than once a month

9b. What social networks are you a member of? Check all that apply.
   - ❑ Facebook
   - ❑ MySpace
   - ❑ LinkedIn
   - ❑ Eventful
   - ❑ Live Journal
   - ❑ Twitter
   - ❑ Digg
   - ❑ Other (Please Specify) _____

10. Do you intend to vote in the general election in November 2008?
   - ❑ Yes
   - ❑ No
   - ❑ Not sure

11. Which of the following best describes your political affiliation?
   - ❑ Democrat
   - ❑ Republican
   - ❑ Independent
   - ❑ Libertarian
   - ❑ Prefer not to say

12. How would you describe your level of political activism?
   - ❑ Very politically active
   - ❑ Occasionally active in politics
   - ❑ Not engaged in political activities other than voting

13. 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

14. Gender:
   - ❑ Male
   - ❑ Female

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

16. State: _____