



Persuading and Motivating Voters: What Will It Take in 2010?

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Analysis By:

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Background

E-Voter Institute, founded in 1999, 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 A.B. Jagoda is president and co-founder of the Institute.

Previous research is available from <http://e-voterinstitute.com>.

E-Voter Institute has just released the book *About Face: The Dramatic Impact of the Internet on Politics and Advocacy*, Karen A.B. Jagoda co-author and editor (E-Voter Institute Press, 2009) which continues the work documented in the previous 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://evoterinstitute.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. Rich Berke is vice president, Kendall Anderson was the project manager and Michelle Lambert, research analyst for these surveys. For more information, please visit <http://www.hcdi.net>.

Methodology and Sample

To recruit respondents for the 4th 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 throughout June 2009. 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.

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.

There were a total of 1476 survey respondents in the sample- 29% men and 71% women over the age 18. Age and self-identified ideology distributions are:

Age distribution

Age	Total
Base	(n=1476)
18-24	14%
25-34	26%
35-54	44%
55-64	11%
65-74	4%
75+	1%

Ideology	Total
Base	(n=1476)
I am very liberal	14%
I am somewhat liberal	22%
I am moderate	38%
I am somewhat conservative	16%
I am very conservative	10%

EXECUTIVE SUMMARY

Finding 1

Expectations for candidates and advocates have remained remarkably consistent over the last 4 years. Voter expectations will continue to increase and those following the Obama game plan will be woefully out of date come 2010---three years after the Obama plan was hatched.

Finding 2

Voters are engaging in a wider range of political activities online. The new definition of activism continues to reveal that there are many ways for voters to participate in the official and unofficial campaign.

Finding 3

The Internet is increasingly integrated into our everyday lives. Traditional means of getting information and news is slipping in popularity though those trusted brands are finding audiences online.

Finding 4

Voters realize they live in a crowded and fragmented media environment and that it is hard to get their attention.

Finding 5

There is clearly a maturing of certain web tools in the political campaign process, particularly the candidate's web site, the use of email, and search.

Finding 6

Age matters most when it comes to donating to a campaign, attending a political event, volunteering for a campaign, and sending and receiving email about political issues. As people age, voting decisions are more influenced by television and cable news reports and commentators.

Finding 7

Debates were cited as having the most influence on voting decisions regardless of party affiliation, ethnicity or age. It is unclear however if voters watched entire debates, saw clips on YouTube, heard about them on news reports or read about them in newspapers or online. We suspect that the unscripted moments of these debates are what stayed with people and influenced their opinions the most.

E-Voter Voter Expectations Survey 2009

Finding 1

Expectations for candidates and advocates have remained remarkably consistent over the last 4 years. Voter expectations will continue to increase and those following the Obama game plan will be woefully out of date come 2010---three years after the Obama plan was hatched.

Why has it taken so long for political consultants to catch on to the power of the Internet? They didn't really pay attention until a national candidate who used the web creatively won primary and general elections.

Voters expect social networking sites to be used by candidates more often than before. This holds true regardless of political affiliation, social networking usage status and age.

How do you expect candidates to use the Internet? (Multiple Response)	TOTAL			
	2006	2007	2008	2009
Base	1,023	1,609	4,801	1,476
Official web site	87%	82%	87%	85%
E-mail	70%	65%	60%	68%
Television ads on the official web site	66%	59%	68%	66%
Fund raising	67%	64%	70%	63%
Online ads	65%	58%	65%	60%
Webcasts of events	NA	54%	62%	59%
Blogs and podcasts	52%	57%	55%	57%
Campaign web video on other sites	NA	54%	60%	56%
Participate in social networking sites	NA	43%	38%	49%
Twitter	NA	NA	N/A	42%

It is useful to look at the data by ethnic group both for how consistent the responses are as well as to note the differences. Expectations for most online activities continue to rise across all ethnic groups.

Data in the following chart compares survey responses from November 2008 and June 2009 where we see a jump in expectations by Caucasians and Asians for blogs and podcasts and rising expectations by all groups of participation in social networks.

	Ethnicity							
	Caucasian		Hispanic		African-American		Asian	
Expectation of Candidates	2008	2009	2008	2009	2008	2009	2008	2009
Base	(n=2864)	(n=1112)	(n=136)	(n=86)	(n=244)	(n=121)	(n=201)	(n=91)
Official web site	85%	86%	78%	84%	82%	83%	81%	85%
Fund raising	67%	64%	61%	49%	66%	60%	64%	70%
E-mail	65%	66%	65%	71%	70%	74%	66%	73%
Online ads	62%	60%	57%	51%	61%	64%	65%	68%
Webcasts of events	60%	61%	61%	49%	56%	52%	59%	63%
Blogs and podcasts	46%	57%	49%	45%	47%	56%	57%	70%
Television ads on the official web site	62%	65%	65%	70%	68%	64%	63%	71%
Campaign web video on other sites	59%	56%	57%	49%	64%	56%	62%	67%
Participate in social networking sites	31%	47%	36%	52%	39%	45%	39%	73%
Twitter	N/A	40%	N/A	40%	N/A	49%	N/A	53%

When we look at the best ways for candidates to get a voter's attention and the expectations of those voters, there are significant differences by education level, gender, and ethnicity. Differences to keep in mind as we look further at ways to communicate with voters.

Expectations of Candidates 2009	Highest level of education			Gender	
	Some/ Completed High School	Some/ Completed Undergrad	Postgraduate	Male	Female
Base	(n=269)	(n=968)	(n=230)	(n=431)	(n=1045)
Official web site	80%	86%	90%	83%	86%
Fund raising	51%	64%	73%	65%	62%
E-mail	66%	67%	74%	73%	66%
Online ads	55%	61%	63%	63%	59%
Webcasts of events	51%	60%	67%	61%	58%
Blogs and podcasts	45%	59%	64%	55%	58%
Television ads on the official web site	61%	68%	63%	70%	64%
Campaign web video on other sites	53%	56%	62%	59%	55%
Participate in social networking sites	39%	50%	53%	50%	48%
Twitter	36%	42%	48%	46%	40%

Best ways for a candidate to get your attention 2009	Highest level of education			Gender	
	Some/ Completed High School	Some/ Completed Undergrad	Postgraduate	Male	Female
Base	(n=269)	(n=968)	(n=230)	(n=431)	(n=1045)
Television or cable ads	70%	64%	56%	62%	65%
Direct mail	42%	38%	29%	33%	38%
Online ads	38%	35%	26%	33%	34%
E-mail from candidate or celebrity endorser	29%	28%	25%	31%	27%
Newspaper ads	40%	36%	31%	37%	35%
Social networking sites	27%	30%	29%	31%	28%
Phone	15%	12%	10%	15%	11%
Official web site	52%	61%	43%	48%	60%
Viral video about a candidate	11%	18%	13%	19%	15%
Radio ads	33%	36%	26%	32%	34%
Webcasts	23%	27%	26%	28%	25%
Debates	53%	60%	66%	57%	60%
Blogs	21%	27%	27%	25%	26%
Text messaging	10%	11%	11%	14%	10%
Yard signs and outdoor billboards	28%	31%	22%	26%	30%
Word of mouth	41%	47%	40%	43%	46%
Events and rallies	42%	48%	43%	42%	47%
Bumper Stickers	24%	23%	15%	21%	23%
Endorsements	20%	26%	20%	23%	25%
Twitter	14%	19%	16%	18%	17%

Best ways for candidates to get your attention? 2009	Ethnicity			
	Caucasian	Hispanic	African-American	Asian
Base	(n=1112)	(n=86)	(n=121)	(n=91)
Television or cable ads	64%	63%	70%	60%
Direct mail	37%	35%	42%	32%
Online ads	31%	31%	47%	47%
E-mail from candidate or celebrity endorser	26%	30%	40%	26%
Newspaper ads	35%	31%	44%	42%
Social networking sites	26%	36%	37%	40%
Phone	11%	19%	20%	14%
Official web site	56%	57%	63%	53%
Viral video about a candidate	14%	12%	22%	23%
Radio ads	32%	30%	46%	34%
Webcasts	24%	31%	29%	35%
Debates	60%	57%	60%	53%
Blogs	24%	24%	28%	37%
Text messaging	8%	20%	18%	16%
Yard signs and outdoor billboards	27%	29%	44%	23%
Word of mouth	45%	34%	51%	48%
Events and rallies	45%	38%	56%	45%
Bumper Stickers	21%	28%	30%	21%
Endorsements	23%	19%	39%	25%
Twitter	14%	22%	30%	30%

Finding 2

Voters are engaging in a wider range of political activities online. The new definition of activism continues to reveal that there are many ways for voters to participate in the official and unofficial campaign.

Candidates need to take a broader view of what it means for constituents to support a campaign. Between 2008 and 2009, we see significant jumps in the percentage of survey respondents who are actively doing something online. When over 50% of the respondents say they searched for information about a candidate, the search strategy needs to make it easier for people to find what they are looking for. When people are inclined to forward email and links, campaigns need to be more creative in messaging so as to tap into that desire to share compelling content and ideas.

Political Activities	Total	
	2008	2009
Base	(n=4801)	(n=1476)
Searched online for additional information about politics	38%	51%
Visited a candidate web site	41%	51%
Received email from friends or family about politics	33%	48%
Told a friend or family to vote for a candidate or initiative	34%	45%
Viewed online videos about candidates	40%	42%
Forwarded links or email to friends/family about political issues	28%	38%
Read a blog about politics or candidates	27%	36%
Sent an email to a candidate or politician about your concerns	22%	31%
Attended a political event	16%	29%
Watched a webcast from a candidate event	N/A	27%
Donated to a candidate or cause online (2008) Donated to a candidate or cause (2009) Note: not statistically comparable	13%	25%
Clicked on an online political ad	18%	25%
Submitted an email address in order to receive candidate information	17%	24%
Participated in an online discussion about politics	18%	22%
Volunteered for a political or issue campaign	9%	17%

Viewing political activities by political affiliation shows that Republicans are nearly 30% less likely to submit an email address in order to receive candidate information than Democrats or Independents.

Democrats are 62% more likely to volunteer for a campaign than Republicans, 50% more likely to watch a webcast from a candidate event, 48% more likely to click on an online ad, and 36% more likely to attend a political event.

While 30% of both Democrats and Republicans sent email to a candidate or politician about their concerns, 39% of the Independents did so.

Political Activities	Political Affiliation		
	Democrat (n=596)	Republican (n=358)	Independent (n=326)
Base	(n=596)	(n=358)	(n=326)
Donated to a candidate or cause	26%	24%	27%
Submitted an email address in order to receive candidate information	28%	20%	27%
Searched online for additional information about politics	54%	48%	54%
Clicked on an online political ad	31%	21%	24%
Attended a political event	34%	25%	28%
Volunteered for a political or issue campaign	21%	13%	17%
Told a friend or family to vote for a candidate or initiative	47%	52%	41%
Forwarded links or email to friends/family about political issues	39%	40%	38%
Participated in an online discussion about politics	25%	20%	23%
Visited a candidate web site	56%	48%	54%
Read a blog about politics or candidates	36%	34%	41%
Viewed online videos about candidates	44%	41%	45%
Received email from friends or family about politics	49%	52%	47%
Sent an email to a candidate or politician about your concerns	30%	30%	39%
Watched a webcast from a candidate event	33%	22%	24%

We looked at those who said they contributed to political campaigns and zeroed in on their social network status and whether they were members of Twitter. Those survey responders who are most active on social networks and especially Twitter members show significantly higher willingness to donate in a wide variety of ways.

		Social network status			Twitter member vs. other social network member	
		Member and frequently updates	Member but does not frequently update	Non member	Twitter member	Other social network member
Of those who contributed 2009	Total					
Base	366	104	128	134	102	130
Donated at an event	43%	59%	41%	33%	54%	45%
Donated on the candidate web site	36%	44%	40%	25%	47%	38%
Donated online in response to an email	30%	39%	30%	22%	41%	28%
Donated through the mail in response to direct mail or phone call you received	30%	30%	28%	31%	32%	26%
Donated because a friend or family member encouraged you	20%	25%	20%	17%	27%	18%
Donated over the phone in response to a campaign volunteer	16%	21%	13%	13%	23%	12%
Donated online in response to direct mail	15%	22%	8%	16%	20%	10%
Donated through the mail in response to a television/cable ad	10%	17%	7%	8%	17%	8%

Finding 3

The Internet is increasingly integrated into our everyday lives. Traditional means of getting information and news is slipping in popularity though those trusted brands are finding audiences online.

When people go to the web for news and current events they are still most likely to go to trusted sources from other media such as newspapers, local television and radio and broadcast and cable television. Social networks and search are the two means that increased in popularity from 2008-2009. We did not ask about portals and web video sites in 2008 but clearly portal sites have not lost their popularity amongst nearly 25% of the voters.

As we see in Finding 2, political events and rallies are popular with over 50% of the most politically active. It would make sense for candidates to consider utilizing these identified sources of news and information about current events to announce and promote these events. We also see that well promoted events will contribute to increasing numbers of donators.

Sources of News and current events	2008	2009
Base	(n=4801)	(n=1476)
Local television	46%	38%
Newspapers	45%	37%
Cable television	36%	35%
Network television	38%	29%
News related web sites	35%	29%
Portal sites like Yahoo, AOL, MSN	N/A	23%
Radio	19%	21%
Friends and family	20%	20%
Search engines	8%	10%
Debates	12%	10%
E-mail	8%	8%
Magazines	7%	8%
Candidate commercials	9%	6%
Online social networks	4%	6%
Blogs	6%	6%
People from work	5%	5%
Twitter	N/A	4%
Web video sites	N/A	3%
Books	1%	1%

Local television and cable related sites are the most popular with those who are very conservative. National newspaper sites are twice as popular with very liberal respondents as those who call themselves very conservative.

Sites for general information 2009	Total	Ideology		
		Very liberal	Somewhat liberal/ Moderate/ Somewhat conservative	Very conservative
Base	1,476	201	1,126	149
Portal sites like Yahoo, AOL, MSN	49%	46%	50%	43%
Search engines	48%	43%	48%	49%
Local newspaper site	40%	39%	41%	37%
Local television or radio sponsored sites	34%	27%	34%	37%
Cable news sites	34%	29%	34%	41%
Weather-related sites	32%	27%	33%	38%
National newspaper sites like USAToday, NYTimes.com, Wall Street Journal	29%	36%	29%	18%
Social networks	26%	32%	26%	22%
Health care sites	24%	28%	24%	20%
Broadcast television based sites	23%	25%	23%	24%
Blogs	20%	26%	19%	22%
Educational sites	19%	22%	18%	22%
Entertainment and fashion sites	18%	25%	18%	10%
Financial related sites	16%	20%	16%	14%
Sports related sites	13%	16%	12%	16%
Travel related sites	13%	18%	12%	10%
Music sites	10%	21%	9%	5%

What kinds of web sites are most useful for general information and how does their appeal differ by ethnic group?

- Asians show strong preference for national newspaper sites
- African-Americans significantly favor broadcast television based sites
- Hispanics show the most interest in cable news sites and the least interest in newspaper sites
- Caucasians are significantly more interested in weather-related sites

Web sites for general information 2009	Ethnicity			
	Caucasian	Hispanic	African-American	Asian
Base	(n=1112)	(n=86)	(n=121)	(n=91)
Local newspaper site	41%	22%	40%	43%
National newspaper sites like USAToday, NYTimes.com, Wall Street Journal	27%	23%	31%	47%
Local television or radio sponsored sites	34%	29%	41%	27%
Broadcast television based sites	22%	19%	34%	24%
Cable news sites	33%	37%	35%	31%
Sports related sites	12%	21%	14%	20%
Travel related sites	12%	13%	10%	20%
Financial related sites	16%	15%	14%	26%
Health care sites	24%	26%	26%	24%
Educational sites	17%	20%	24%	30%
Search engines	48%	45%	48%	48%
Portal sites like Yahoo, AOL, MSN	48%	43%	50%	67%
Entertainment and fashion sites	16%	17%	29%	31%
Music sites	9%	17%	13%	11%
Social networks	26%	30%	21%	35%
Blogs	19%	19%	19%	31%
Weather-related sites	36%	26%	17%	23%

More people are participating in more activities online like blogging, tweeting and updating their online social network. These are active actions versus sitting back and watching a television ad or reading a piece of direct mail. Perhaps the traditional means of communicating are lacking the feedback loop that the web so easily provides and which might be setting a new standard for communicating with candidates and advocates.

Characteristics of Voters	Total	
	2008	2009
Base	(n=4801)	(n=1476)
Use email	92%	90%
Make online purchases of consumer goods, travel or subscriptions	79%	75%
Forward links and email to friends/family	69%	66%
Read newspapers or magazines online	66%	66%
Have broadband access to the Internet at home	73%	65%
Have wireless capability	53%	58%
Social network member	44%	54%
Play online games	57%	52%
Download video and/or audio	53%	51%
Listen to online radio	44%	44%
Post ratings or comments online	46%	43%
Upload video and/or audio	33%	34%
Post to other blogs	28%	31%
Maintain a blog or your own web site	19%	23%
Use Twitter	5%	22%
Subscribe to RSS feeds	18%	19%
Use widgets	19%	18%

There was an increase in interest across all levels of political activism in participating in social networks, maintaining a blog, using Twitter, and having wireless access to the Internet. Likewise there were decreases in interest in forwarding links, making online purchases, playing online games, and having broadband access at home. These perhaps are signs of economic distress.

In 2009, over one third of the most politically active were using Twitter, twice as many as those in the least politically active group.

Characteristics of Voters	Level of political activism					
	Very politically active		Occasionally active in politics		Not engaged in political activities other than voting	
	year		year		year	
	2008 (n=676)	2009 (n=226)	2008 (n=1845)	2009 (n=603)	2008 (n=2280)	2009 (n=647)
Base						
Use email	85%	81%	92%	93%	94%	92%
Social network member	53%	58%	49%	58%	37%	49%
Maintain a blog or your own web site	29%	30%	22%	26%	13%	17%
Post to other blogs	45%	44%	34%	36%	19%	23%
Post ratings or comments online	57%	52%	53%	51%	37%	33%
Subscribe to RSS feeds	30%	30%	21%	20%	12%	15%
Download video and/or audio	62%	58%	60%	55%	45%	44%
Use widgets	27%	28%	22%	17%	14%	15%
Upload video and/or audio	42%	43%	40%	39%	25%	26%
Listen to online radio	55%	56%	50%	47%	36%	37%
Forward links and email to friends/family	68%	67%	71%	68%	67%	65%
Play online games	55%	51%	61%	55%	55%	51%
Make online purchases of consumer goods, travel or subscriptions	75%	66%	81%	77%	78%	76%
Use Twitter	15%	35%	5%	23%	2%	17%
Read newspapers or magazines online	73%	67%	74%	71%	58%	60%
Have broadband access to the Internet at home	73%	65%	75%	69%	72%	62%
Have wireless capability	59%	64%	58%	62%	46%	51%

When looking at online behavior by ethnic group it is striking that over 80% of all groups use email though Caucasians use email the most. Two thirds of the Caucasians and Asians forward email while just over 50% of Hispanics and African-Americans do. Asians are the most likely to download and upload video. Hispanics are least likely to maintain their own blog.

Characteristics of Voters by Ethnicity 2009	Caucasian	Hispanic	African-American	Asian
Base	(n=1112)	(n=86)	(n=121)	(n=91)
Use email	92%	80%	87%	87%
Social network member	54%	52%	55%	60%
Maintain a blog or your own web site	22%	17%	27%	29%
Post to other blogs	30%	29%	32%	44%
Post ratings or comments online	43%	37%	44%	53%
Subscribe to RSS feeds	19%	20%	12%	26%
Download video and/or audio	50%	49%	48%	65%
Use widgets	17%	19%	19%	23%
Upload video and/or audio	33%	27%	40%	44%
Listen to online radio	43%	40%	50%	54%
Forward links and email to friends/family	69%	53%	54%	66%
Play online games	52%	48%	55%	59%
Make online purchases of consumer goods, travel or subscriptions	77%	59%	73%	73%
Use Twitter	20%	20%	29%	33%
Read newspapers or magazines online	66%	51%	61%	73%
Have broadband access to the Internet at home	67%	53%	63%	73%
Have wireless capability	58%	43%	51%	68%

Finding 4

Voters realize they live in a crowded and fragmented media environment and that it is hard to get their attention.

Between 2008 and 2009, there was a jump in the number of respondents in every category of means of communication. Internet related methods showed the most significant increase. Between 2007 and 2009, interest in debates doubled while interest in viral video about a candidate dropped in popularity by over 50% as did interest in text messaging.

Looking across all media, this 2009 survey indicates the top five ways to get voters' attention are:

- TV/cable ads 64%
- Debates 59%
- Official website 57%
- Events and rallies 46%
- Word of mouth 45%

Best way to get attention	Total		
	2007	2008	2009
Base	1,609	(n=4801)	(n=1476)
Television or cable ads	64%	63%	64%
Debates	29%	57%	59%
Official web site	53%	51%	57%
Events and rallies	NA	3%	46%
Word of mouth	7%	39%	45%
Direct mail	37%	31%	37%
Newspaper ads	35%	29%	36%
Online ads	30%	25%	34%
Radio ads	35%	26%	33%
Social networking sites	24%	15%	29%
Yard signs and outdoor billboards	48%	20%	29%
E-mail from candidate or celebrity endorser	36%	22%	28%
Webcasts	21%	20%	26%
Blogs	10%	16%	26%
Endorsements	NA	NA	24%
Bumper Stickers	NA	NA	22%
Twitter	NA	NA	17%
Viral video about a candidate	31%	14%	16%
Phone	12%	9%	13%
Text messaging	29%	5%	11%

Due to the relatively recent introduction of social media to political campaigns, social networking sites don't make the top five ways that voters have identified as a good way to reach them. The survey results do reveal social media provides a strong tool to get voters' attention, particularly among:

- Those who frequently update their social networking sites
- Those who are very liberal
- Those who are 18-24 years old

Social networking sites are expected to be a good tool for getting the attention of more people as the number and diversity of people participating in social networks continue to grow.

	Social network status					
	Member and frequently updates		Member but does not frequently update		Non member	
	year		year		year	
	2008	2009	2008	2009	2008	2009
Best way to get attention						
Base	(n=642)	(n=348)	(n=1453)	(n=454)	(n=2706)	(n=674)
Television or cable ads	63%	68%	64%	65%	62%	62%
Official web site	62%	66%	58%	66%	45%	46%
Debates	60%	63%	62%	64%	53%	54%
Events and rallies	N/A	58%	N/A	48%	N/A	38%
Word of mouth	49%	53%	47%	49%	33%	38%
Social networking sites	36%	52%	20%	33%	7%	15%
Radio ads	27%	44%	27%	32%	25%	29%
Online ads	35%	43%	27%	36%	21%	28%
Blogs	30%	41%	20%	28%	10%	17%
Direct mail	34%	39%	30%	35%	31%	37%
Newspaper ads	31%	39%	28%	34%	30%	36%
Yard signs and outdoor billboards	26%	38%	21%	30%	17%	24%
Webcasts	30%	36%	24%	27%	15%	21%
Endorsements	N/A	35%	N/A	24%	N/A	19%
E-mail from candidate or celebrity endorser	33%	33%	23%	29%	19%	24%
Bumper Stickers	N/A	33%	N/A	23%	N/A	16%
Twitter	N/A	32%	N/A	16%	N/A	11%
Viral video about a candidate	28%	29%	18%	16%	9%	9%
Text messaging	11%	18%	3%	8%	4%	9%
Phone	15%	14%	7%	9%	8%	14%

Best Way to Get Voters Attention	Ideology					
	Very liberal		Somewhat liberal/Moderate/Somewhat conservative		Very conservative	
	year		year		year	
	2008	2009	2008	2009	2008	2009
Base	(n=563)	(n=201)	(n=3823)	(n=1126)	(n=415)	(n=149)
Television or cable ads	61%	59%	64%	65%	59%	63%
Direct mail	34%	39%	31%	36%	33%	42%
Online ads	31%	39%	24%	34%	21%	28%
E-mail from candidate or celebrity endorser	30%	40%	21%	26%	17%	23%
Newspaper ads	32%	30%	29%	37%	27%	32%
Social networking sites	23%	41%	15%	28%	11%	19%
Phone	14%	21%	8%	11%	9%	10%
Official web site	58%	54%	51%	57%	41%	58%
Viral video about a candidate	21%	28%	13%	14%	10%	13%
Radio ads	28%	35%	26%	32%	28%	41%
Webcasts	26%	35%	19%	25%	16%	21%
Debates	61%	56%	56%	59%	56%	60%
Blogs	26%	35%	15%	25%	11%	20%
Text messaging	8%	21%	4%	10%	4%	5%
Yard signs and outdoor billboards	25%	29%	19%	28%	17%	34%
Word of mouth	43%	53%	39%	44%	34%	43%
Events and rallies	N/A	47%	N/A	46%	N/A	44%
Bumper Stickers	N/A	31%	N/A	21%	N/A	20%
Endorsements	N/A	27%	N/A	25%	N/A	17%
Twitter	N/A	25%	N/A	17%	N/A	9%

Best Way to Get Attention 2009	Age					
	18-24	25-34	35-54	55-64	65-74	75+
Base	(n=201)	(n=385)	(n=649)	(n=164)	(n=63)	(n=9)
Television or cable ads	62%	61%	66%	66%	67%	67%
Direct mail	38%	33%	36%	39%	57%	67%
Online ads	43%	38%	32%	26%	27%	0%
E-mail from candidate or celebrity endorser	34%	27%	26%	26%	40%	33%
Newspaper ads	32%	34%	37%	35%	44%	56%
Social networking sites	48%	33%	25%	16%	22%	0%
Phone	18%	11%	12%	12%	8%	11%
Official web site	64%	55%	57%	55%	38%	56%
Viral video about a candidate	25%	20%	12%	10%	13%	0%
Radio ads	36%	35%	33%	34%	24%	0%
Webcasts	28%	30%	26%	21%	17%	11%
Debates	58%	56%	58%	68%	62%	78%
Blogs	33%	32%	23%	17%	14%	0%
Text messaging	17%	14%	9%	3%	11%	0%
Yard signs and outdoor billboards	32%	29%	29%	28%	24%	33%
Word of mouth	58%	51%	41%	33%	46%	44%
Events and rallies	52%	45%	45%	48%	32%	33%
Bumper Stickers	31%	26%	19%	18%	13%	0%
Endorsements	35%	22%	23%	22%	29%	22%
Twitter	24%	22%	16%	10%	8%	11%

Finding 5

There is clearly a maturing of certain web tools in the political campaign process, particularly the candidate’s web site, the use of email, and search.

An official web site is now expected by over 80% of voters at all levels of political activism. Following that means of communications is email which is even more expected by those who are very politically active than television ads on a web site.

Expectations of Candidates 2009	Level of political activism		
	Very politically active	Occasionally active in politics	Not engaged in political activities other than voting
Base	226	603	647
Official web site	84%	88%	83%
Fund raising	67%	66%	59%
E-mail	78%	71%	62%
Online ads	67%	61%	57%
Webcasts of events	63%	62%	55%
Blogs and podcasts	64%	59%	53%
Television ads on the official web site	75%	67%	61%
Campaign web video on other sites	64%	59%	51%
Participate in social networking sites	58%	52%	42%
Twitter	52%	41%	38%

Those with the highest level of education show the most interest in email though at least two out of three of the rest of the groups agree. Men are 11% more likely than women to expect email.

Expectations of Candidates	Highest level of education			Gender	
	Some/ Completed High School	Some/ Completed Undergrad	Postgraduate	Male	Female
Base	(n=269)	(n=968)	(n=230)	(n=431)	(n=1045)
Official web site	80%	86%	90%	83%	86%
Fund raising	51%	64%	73%	65%	62%
E-mail	66%	67%	74%	73%	66%
Online ads	55%	61%	63%	63%	59%
Webcasts of events	51%	60%	67%	61%	58%
Blogs and podcasts	45%	59%	64%	55%	58%
Television ads on the official web site	61%	68%	63%	70%	64%
Campaign web video on other sites	53%	56%	62%	59%	55%
Participate in social networking sites	39%	50%	53%	50%	48%
Twitter	36%	42%	48%	46%	40%

The role of email is more obvious when we look at the 50% of those who describe themselves as very politically active who say they forward links and email about political issues and the 55% who say they received email from friends and family about politics. This is compared to the 26% of those who are not engaged in political activism who forward email and a surprising 42% who say they receive email from friends and family about politics.

While only 10% of the not politically active submitted an email to receive information from a candidate, 43% of the politically active did so.

Nearly two out of three of all politically active searched for political information and even 40% of the non-engaged searched for political information as well. Is this an opportunity to turn more of those passive searchers into more active participants in a campaign with the right message?

Political Activities 2009	Level of political activism		
	Very politically active	Occasionally active in politics	Not engaged in political activities other than voting
Base	226	603	647
Donated to a candidate or cause	43%	33%	11%
Submitted an email address in order to receive candidate information	43%	32%	10%
Searched online for additional information about politics	63%	58%	40%
Clicked on an online political ad	48%	29%	14%
Attended a political event	56%	37%	11%
Volunteered for a political or issue campaign	42%	22%	4%
Told a friend or family to vote for a candidate or initiative	62%	53%	32%
Forwarded links or email to friends/family about political issues	50%	46%	26%
Participated in an online discussion about politics	42%	26%	12%
Visited a candidate web site	65%	60%	38%
Read a blog about politics or candidates	54%	43%	24%
Viewed online videos about candidates	56%	50%	30%
Received email from friends or family about politics	55%	53%	42%
Sent an email to a candidate or politician about your concerns	47%	39%	19%
Watched a webcast from a candidate event	45%	32%	17%

Again when we break out respondents by ethnic group we recognize similarities and some cultural differences.

- Over half the Caucasians and Asians searched for information about politics while 31% of the Hispanics went online to search.
- Caucasians, Hispanics and African-Americans were just about equally likely –one in four--to submit an email address to receive information from a candidate while only 13% of the Asians did so.
- Hispanics were least likely to receive email from friends and family about politics and they share with Asians less of an interest in forwarding email than the other groups.

Voter activities 2009	Ethnicity			
	Caucasian (n=1112)	Hispanic (n=86)	African-American (n=121)	Asian (n=91)
Base				
Donated to a candidate or cause	25%	22%	21%	20%
Submitted an email address in order to received candidate information	25%	26%	25%	13%
Searched online for additional information about politics	52%	31%	45%	53%
Clicked on an online political ad	23%	30%	29%	33%
Attended a political event	29%	29%	27%	23%
Volunteered for a political or issue campaign	16%	16%	24%	19%
Told a friend or family to vote for a candidate or initiative	46%	35%	43%	36%
Forwarded links or email to friends/family about political issues	40%	28%	31%	27%
Participated in an online discussion about politics	21%	21%	23%	27%
Visited a candidate web site	52%	43%	49%	44%
Read a blog about politics or candidates	36%	27%	37%	44%
Viewed online videos about candidates	42%	34%	41%	52%
Received email from friends or family about politics	50%	38%	46%	42%
Sent an email to a candidate or politician about your concerns	34%	30%	17%	19%
Watched a webcast from a candidate event	26%	23%	30%	36%

Finding 6

Age matters most when it comes to donating to a campaign, attending a political event, volunteering for a campaign, and sending and receiving email about political issues. As people age, voting decisions are more influenced by television and cable news reports and commentators.

Even a majority of those 55+ years old are showing acceptance of web tools to find out about candidates and causes as well as to contribute online. Since these people are most likely to vote it is useful to look at their most popular politically oriented activities.

Political Activities	Age					
	18-24	25-34	35-54	55-64	65-74	75+
Base	201	385	649	164	63	9
Donated to a candidate or cause	20%	18%	24%	38%	54%	33%
Submitted an email address in order to receive candidate information	24%	21%	25%	23%	37%	22%
Searched online for additional information about politics	53%	52%	49%	54%	52%	33%
Clicked on an online political ad	33%	23%	24%	23%	32%	33%
Attended a political event	27%	27%	27%	37%	41%	33%
Volunteered for a political or issue campaign	18%	16%	16%	19%	37%	22%
Told a friend or family to vote for a candidate or initiative	51%	44%	42%	46%	56%	44%
Forwarded links or email to friends/family about political issues	29%	34%	39%	44%	51%	56%
Participated in an online discussion about politics	25%	23%	21%	20%	22%	33%
Visited a candidate web site	59%	49%	49%	52%	57%	67%
Read a blog about politics or candidates	48%	41%	33%	27%	37%	22%
Viewed online videos about candidates	47%	42%	41%	43%	46%	56%
Received email from friends or family about politics	40%	45%	49%	57%	62%	78%
Sent an email to a candidate or politician about your concerns	21%	27%	33%	44%	43%	44%
Watched a webcast from a candidate event	31%	28%	26%	24%	27%	33%

Those less than 34 years old are most likely to be influenced by how their family members vote as well as their friends. While 8% of those 65-74 years old say newspaper editorials influence their voting decisions, none of the respondents age 18-24 years old said that newspaper editorials made any difference. While everyone seems to think debates are important, they have the biggest influence on those 55-64 years old. Is this the group with the longest attention span and ability to listen to a discussion that goes on for over an hour?

What has the most effect on your decision about who to vote for?	Age					
	18-24	25-34	35-54	55-64	65-74	75+
Base	(n=201)	(n=385)	(n=649)	(n=164)	(n=63)	(n=9)
Who my family votes for	8%	6%	4%	1%	3%	0%
Newspaper editorials	0%	4%	5%	5%	8%	0%
Recommendations from my political party	3%	4%	5%	5%	11%	0%
Friends	7%	5%	3%	2%	3%	0%
Direct mail	1%	3%	1%	1%	2%	0%
Phone calls from campaign volunteers	1%	2%	1%	0%	2%	0%
Endorsements	2%	2%	2%	4%	6%	0%
TV/Cable advertisements	3%	6%	6%	2%	3%	0%
TV/Cable news reports and commentators	12%	10%	14%	16%	22%	33%
Debates	39%	36%	41%	45%	25%	33%

Finding 7

Debates were cited as having the most influence on voting decisions regardless of party affiliation, ethnicity or age. It is unclear however if voters watched entire debates, saw clips on YouTube, heard about them on news reports or read about them in newspapers or online. We suspect that the unscripted moments of these debates are what stayed with people and influenced their opinions the most.

Voters most often identify debates as having the most impact on their decision at 39% followed by television and cable news reports and commentators 13% and websites at 8%. While television ads appeal to a small number, direct mail, phone calls and email hardly register as persuasive.

Influences on Voting Decisions 2009	Total
Base	(n=1476)
Debates	39%
TV/Cable news reports and commentators	13%
Websites	8%
TV/Cable advertisements	5%
Recommendations from my political party	5%
Who my family votes for	5%
Newspaper editorials	4%
Friends	4%
Endorsements	3%
E-mail	2%
Direct mail	1%
Phone calls from campaign volunteers	1%

Republicans are more than twice as likely to be influenced by debates than Democrats, 50% more likely to be influenced by television or cable news reports and commentators, and 33% more likely to be influenced by a recommendation from the political party.

Both Democrats and Independents are 24% more likely than Republicans to be influenced by direct mail in their voting decisions.

There was agreement across the political spectrum on the impact of friends and phone calls from campaign volunteers.

Influences on Voting Decisions 2009	Democrat	Republican	Independent
Base	(n=596)	(n=358)	(n=326)
Who my family votes for	3%	7%	5%
Newspaper editorials	4%	4%	5%
Recommendations from my political party	6%	9%	1%
Friends	4%	4%	3%
Direct mail	2%	1%	2%
Phone calls from campaign volunteers	1%	1%	1%
Endorsements	3%	4%	2%
TV/Cable advertisements	6%	5%	4%
TV/Cable news reports and commentators	14%	13%	14%
Debates	42%	34%	42%
Websites	7%	7%	7%
E-mail	2%	2%	1%

Looking at ethnicity shows remarkable consistency about what influences voting decisions though Hispanics are least likely to be influenced by newspaper editorials and most interested in phone calls from volunteers.

Influences on Voting Decisions 2009	Ethnicity			
	Caucasian	Hispanic	African-American	Asian
Base	(n=1112)	(n=86)	(n=121)	(n=91)
Who my family votes for	5%	3%	4%	5%
Newspaper editorials	5%	0%	5%	7%
Recommendations from my political party	5%	3%	7%	3%
Friends	4%	8%	5%	7%
Direct mail	1%	3%	2%	1%
Phone calls from campaign volunteers	1%	3%	2%	1%
Endorsements	2%	1%	3%	7%
TV/Cable advertisements	5%	3%	9%	7%
TV/Cable news reports and commentators	14%	13%	12%	7%

Debates	39%	42%	38%	33%
Websites	7%	10%	3%	14%
E-mail	2%	1%	2%	3%

Unanswered Questions

It is useful to go back and look at what we know about when people decided who to vote for and when they actually voted. In our November 2008 survey, 18% voted early by mail or absentee and nearly 74% of all decided months before the actual election. Even 16% decided a few weeks before they voted.

In future surveys we will be looking more closely at these early voters to better understand their activities and which channels of information get their attention. This sort of analysis will provide data to help campaigns optimize content, media outreach and timing. Smarter expenditures in campaign budgets will reduce the need for excessive dollars to be spent in the last few days before the official Election day.

Voted in 2008 from Nov-08	Total
Base	(n=3536)
Yes, at the poll	73%
Yes, absentee/ mail-in	18%
No	9%

When decision made on vote from Nov-08	Total
Base	(n=3216)
Months ago	74%
A few weeks ago	16%
The week before the election	4%
The day before the election	2%
When you went behind the curtain and voted	3%

In the E-Voter Institute 2010 Survey of Voter Expectations, we will look more closely at when people claim they have made up their minds about a candidate as well as those who vote early or absentee.