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Public Opinion about Candidate Web sites and Political Advertisements Online

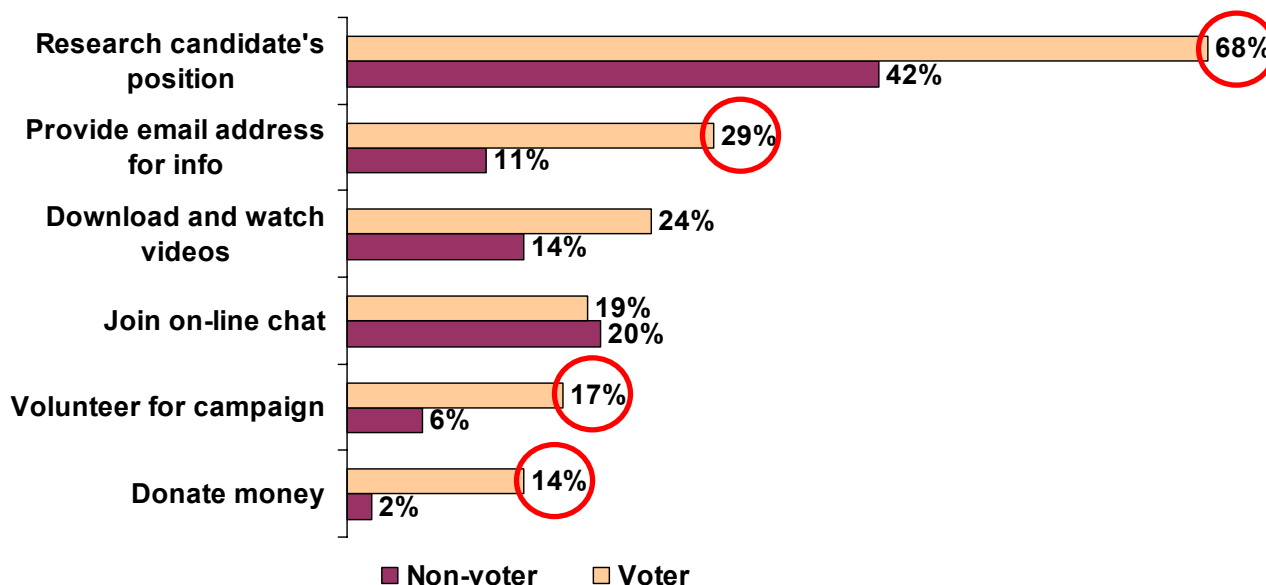
Conducted in partnership with



September 2003

Voters are more engaged with politics online than are *non-voters*

- *Voters** differ from *non-voters* by 26 percentage points in terms of their likelihood to research a candidate's position online.
- *Voters* are significantly more likely to provide an e-mail address, volunteer for a campaign, or donate money to a campaign online than *non-voters*.



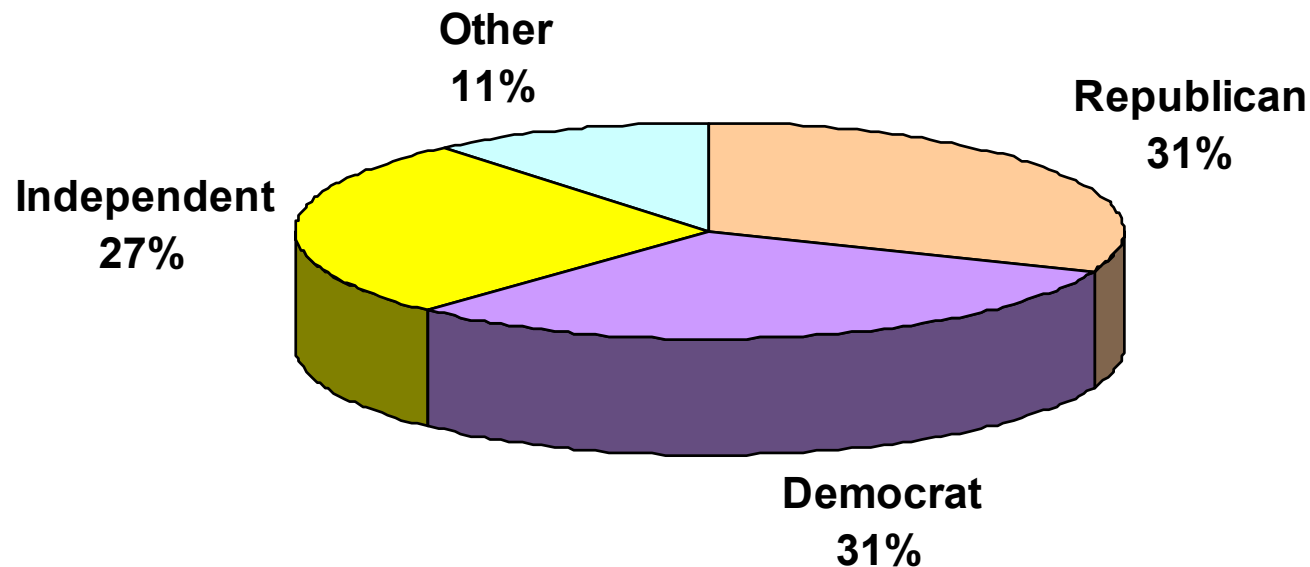
*Voters are defined as those who voted in one or both national elections in 2002 and 2000.

Voter n = 496, Non-voter n = 114

Question NT1a-f – “Please tell me whether you are more likely or unlikely to use a candidate's web site for the following reasons.”

Political parties are represented equally online

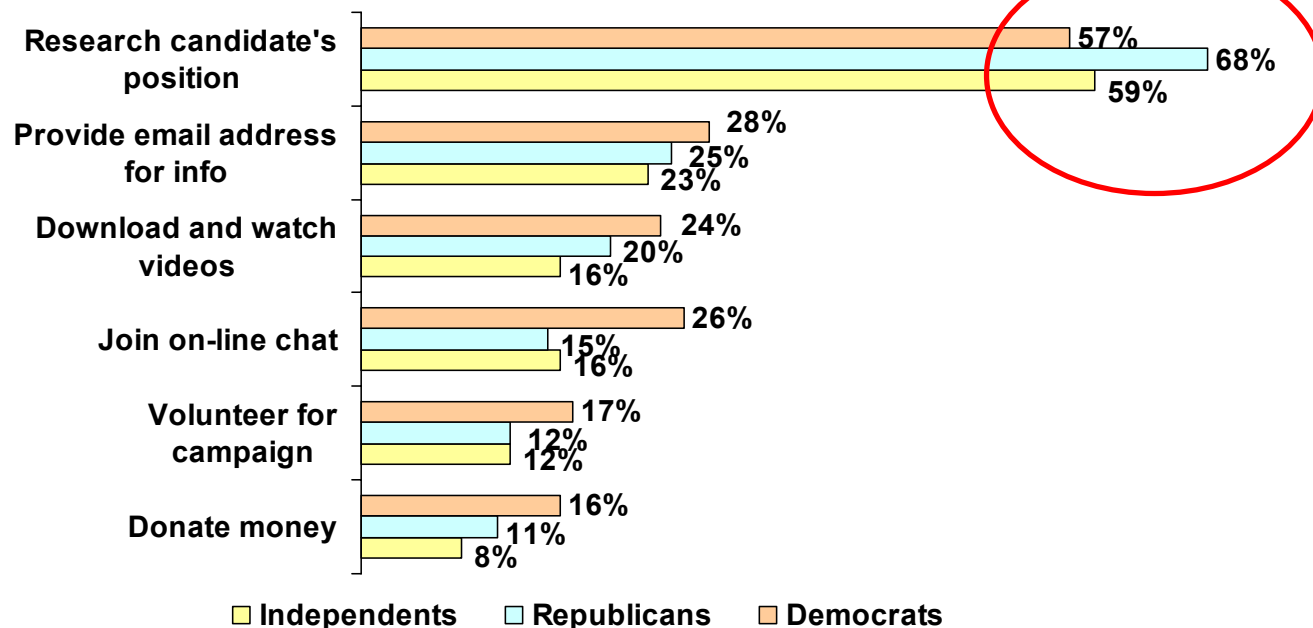
Demographic Breakdown
by Political Party



n = 642 (Internet users)

Party affiliation has little effect on voter engagement with politics online

- A clear majority of Democrats, Republicans and Independents were “very or somewhat likely” to research a candidate’s position online.
- There was little difference based on party affiliation in likelihood to provide e-mail address or volunteer for a campaign online.

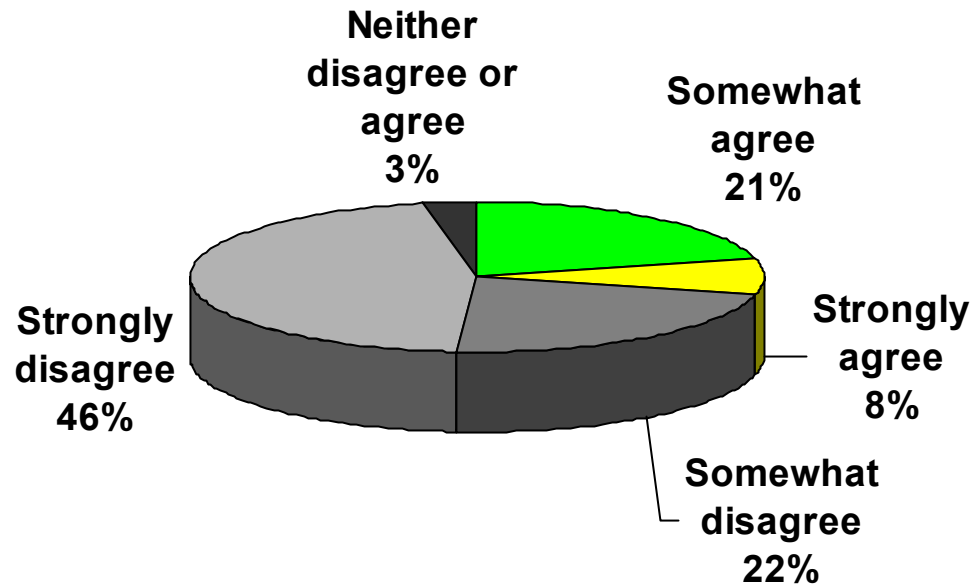


Republicans n = 239, Democrats n = 161, Independent n = 188

Question NT1a-f – “Please tell me whether you are more likely or unlikely to use a candidate's web site for the following reasons.”

Political ads online would interest nearly 30% of Internet users

“Political advertisements on the Internet would interest me.”

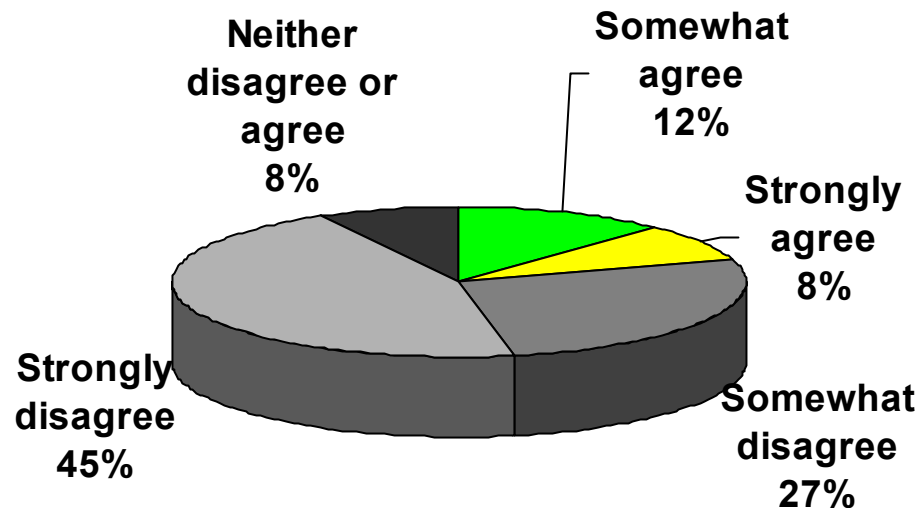


- No significant differences across party affiliation or voter/non-voter groups

n = 642, Question NT2b – “Please tell me whether you agree or disagree with each statement: ‘Political advertisement about candidates on the Internet would interest me.’”

20% would rather watch a candidate's ad online than on TV

“I would rather watch a political advertisement about a candidate on the Internet than on television.”



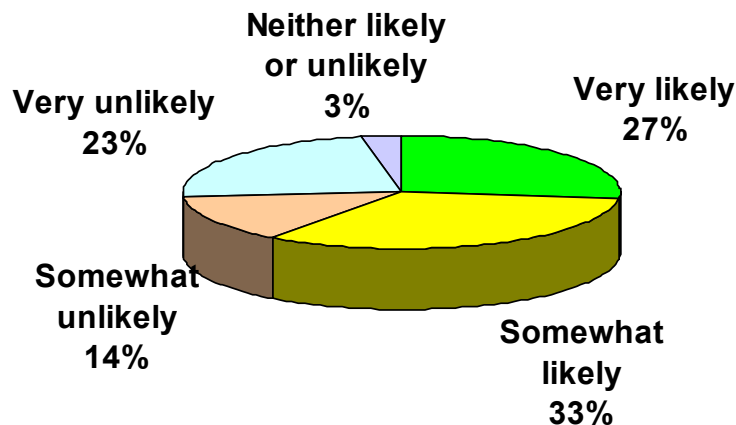
- No significant differences across party affiliation or voter/non-voter groups

n = 642, Question NT2a – “Please tell me whether you agree or disagree with each statement: ‘I would rather watch a political advertisement about a candidate on the Internet than on television.’”

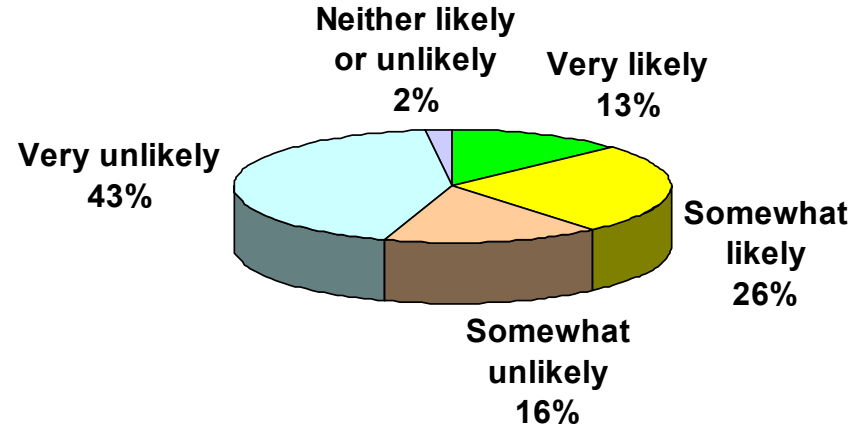
Internet users would notice and respond to political ads online

- **FACT:** 60% of respondents say they are likely to notice an ad for a candidate online; four in 10 say they are likely to click on a political ad.
- **Implication:** Due to a lack of presence of online political advertisements in prior elections, respondents appear more likely to interact with these types of ads in upcoming elections.

Notice the Ad



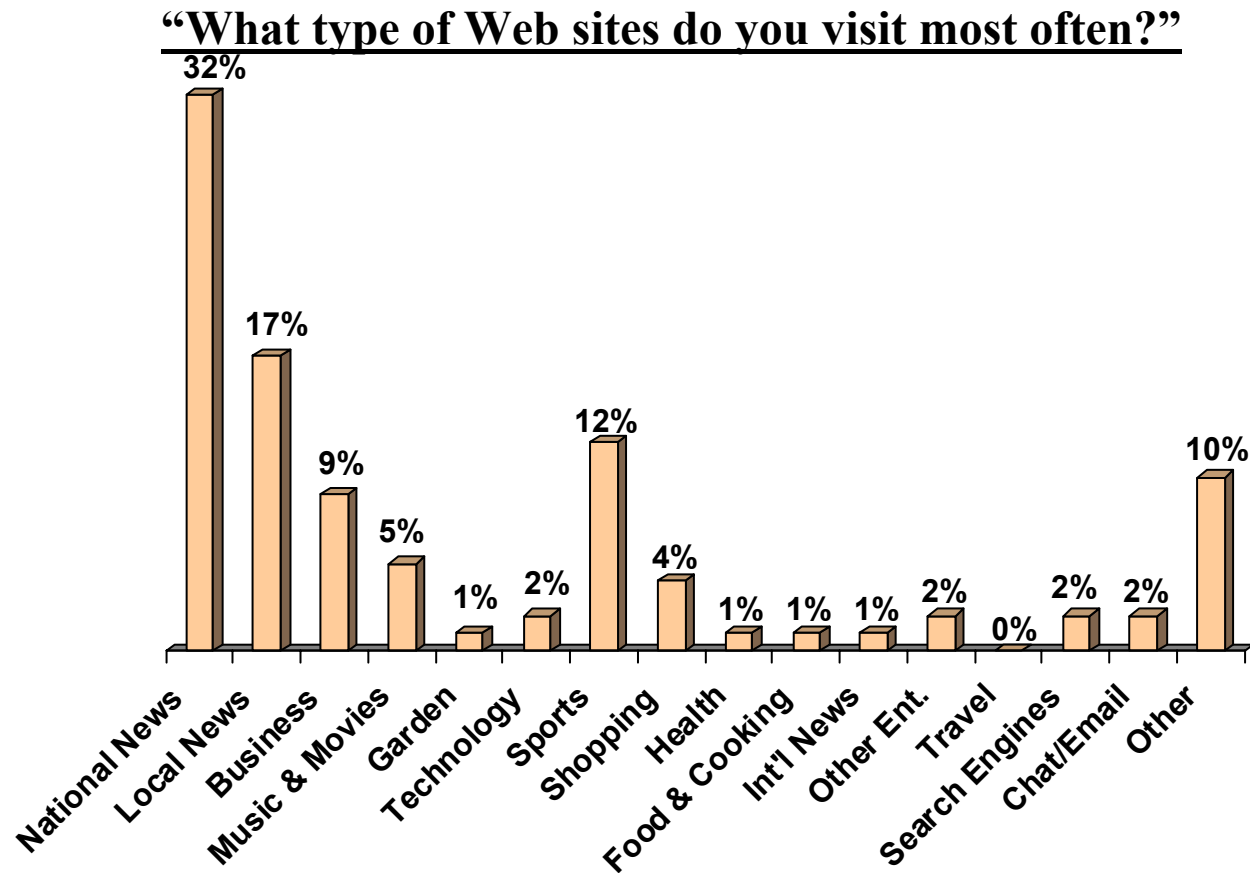
Click on the Ad



n = 659, Question NT4a – “During the next presidential campaign in 2004, if an advertisement appeared for a candidate on a web site, how likely would you be to NOTICE it?”

n = 613, Question NT4b – “During the next presidential campaign in 2004, if an advertisement appeared for a candidate on a web site, how likely would you be to CLICK on it?”

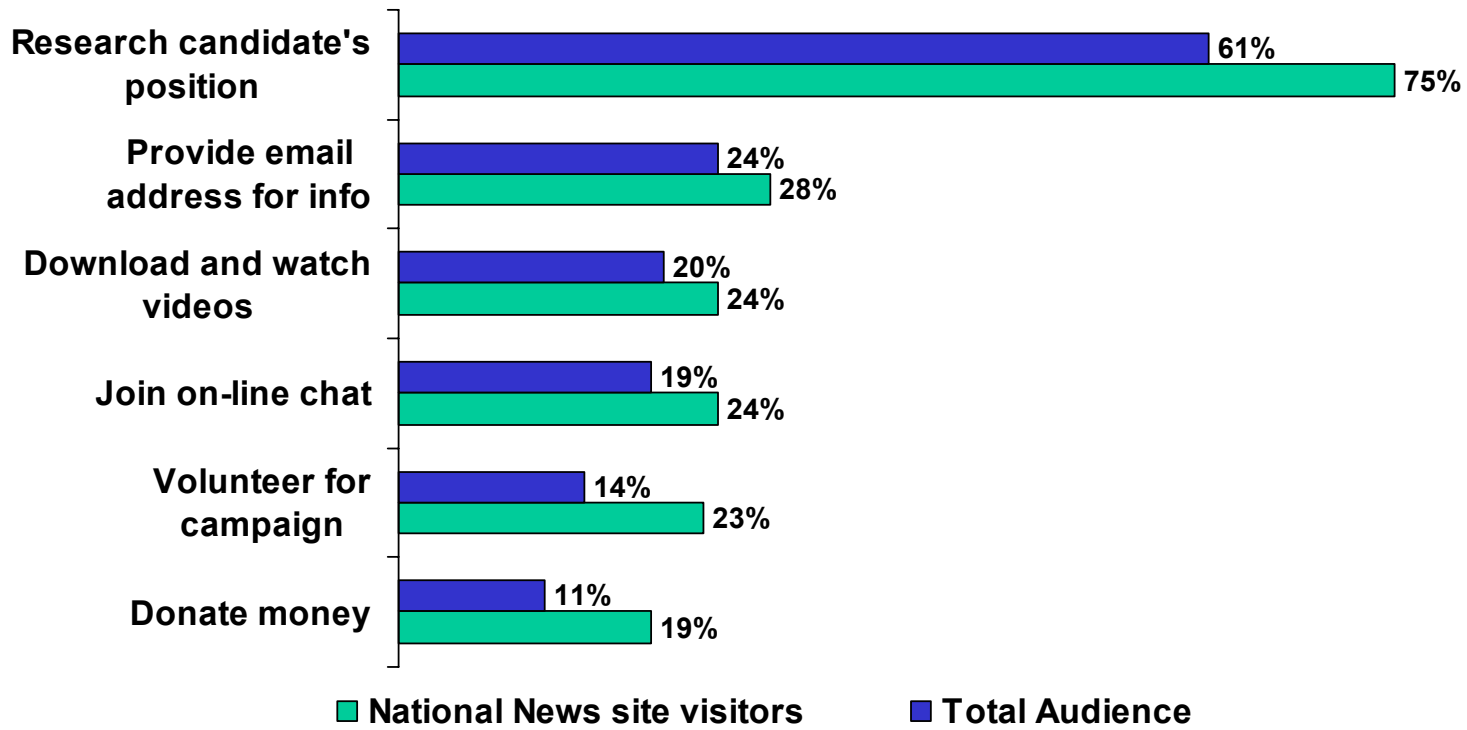
Different Web sites elicit different degrees of political responsiveness



n = 610, Question NT3 – “Of the following list, please tell me what type of web sites you MOST often visit.”

National news site visitors are more likely to use the Internet for politics

- 75% of *National News* site visitors are “very or somewhat likely” to research a candidate’s position online vs. 61% overall; 44% are “very likely.”

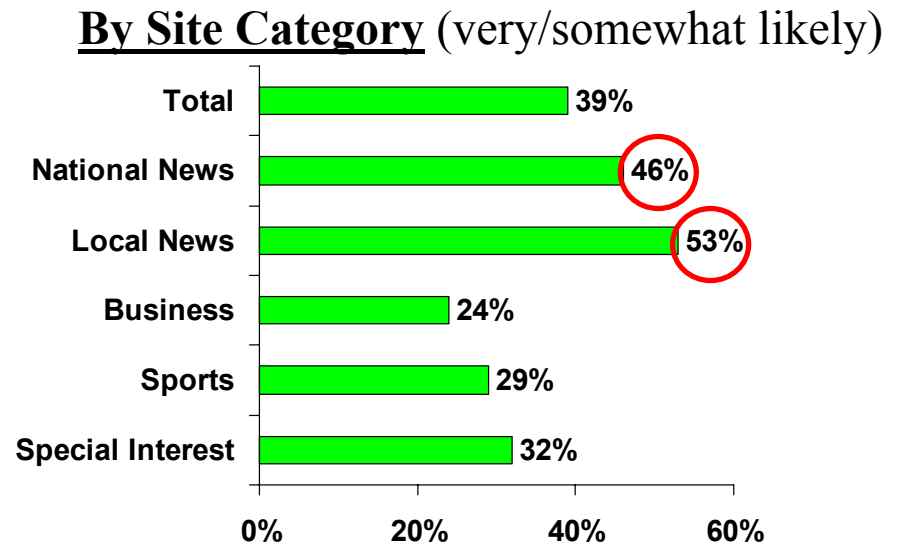
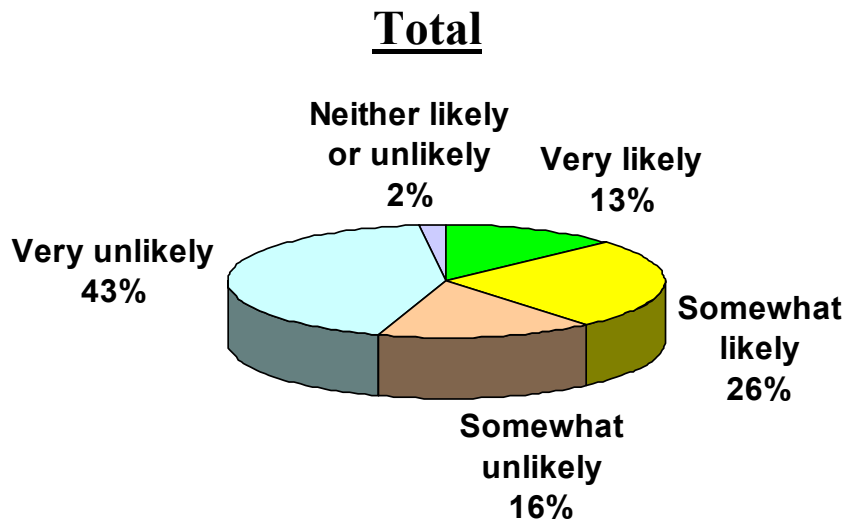


n = 642, Question NT1a-f – “Please tell me whether you are more likely or unlikely to use a candidate's web site for the following reasons.”

News site visitors are more inclined to engage with political advertising

“During the next presidential campaign in 2004, if an advertisement appeared for a candidate on a web site, how likely would you be to CLICK on it?”

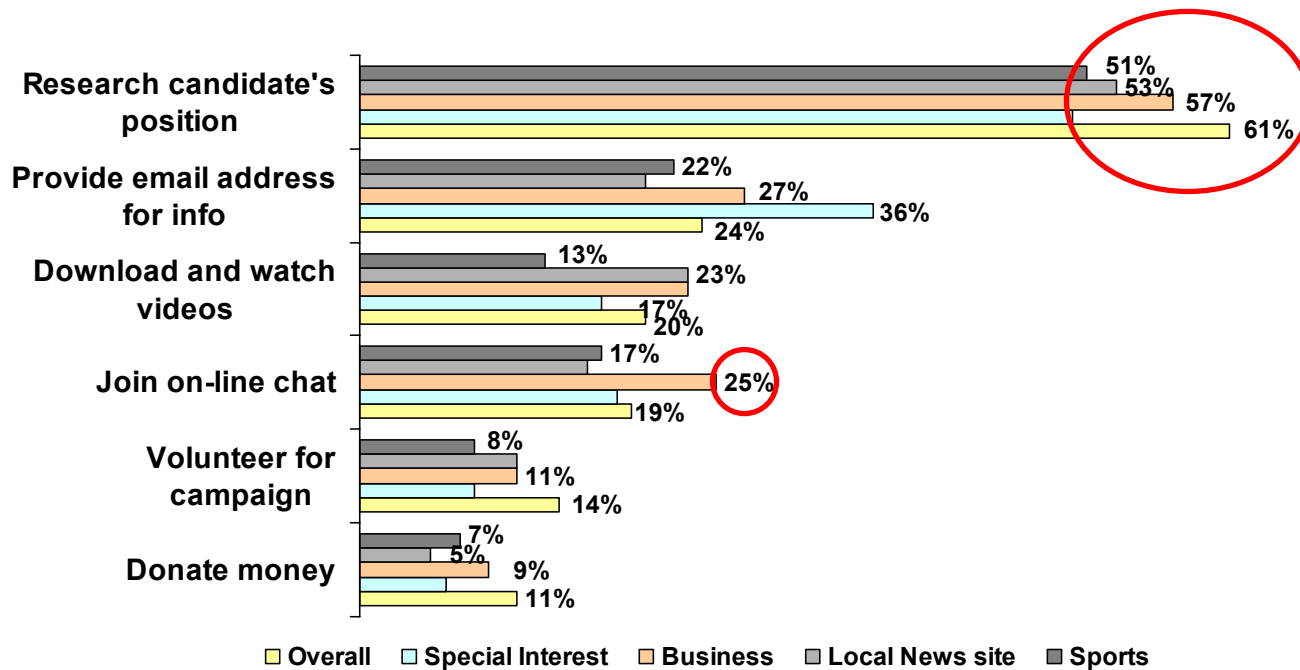
- *Interpretation:* “Click” should be used as a proxy for user engagement, not as an expectation for instantaneous behavior/action online.



Total n = 613, National News n = 210; *Caution: Small base sizes – Local News (n = 79), Business (n = 65), Sports (n = 68), Special Interest (n = 74)
“Special Interest” = Music and Movies, Garden, Technology and Computer, Shopping, Health, Food and Cooking, and Travel site visitors.

Business site visitors are more apt to join a political chat online...

- A majority of each segment is “very or somewhat likely” to *research a candidate’s position on the Internet*, particularly Business site visitors (57%).



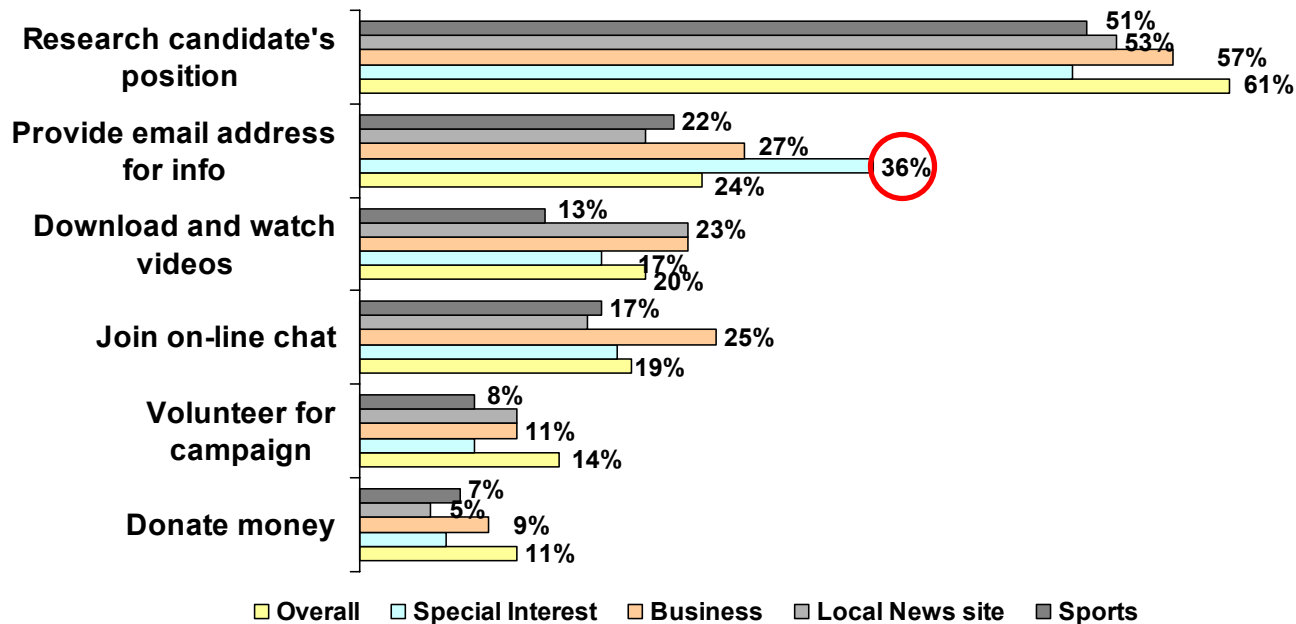
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Question NT1a-f – “Please tell me whether you are more likely or unlikely to use a candidate's web site for the following reasons.”

“Special Interest” = Music and Movies, Garden, Technology and Computer, Shopping, Health, Food and Cooking, and Travel site visitors.

...while Special Interest site visitors are more likely to sign-up for info

- Special Interest site visitors are more likely than other segments to *provide an email address to receive information*.



*Caution, small base sizes – Local news site (n = 79), Business site (n = 65), Sports site (n = 68), Special Interest site (n = 74)

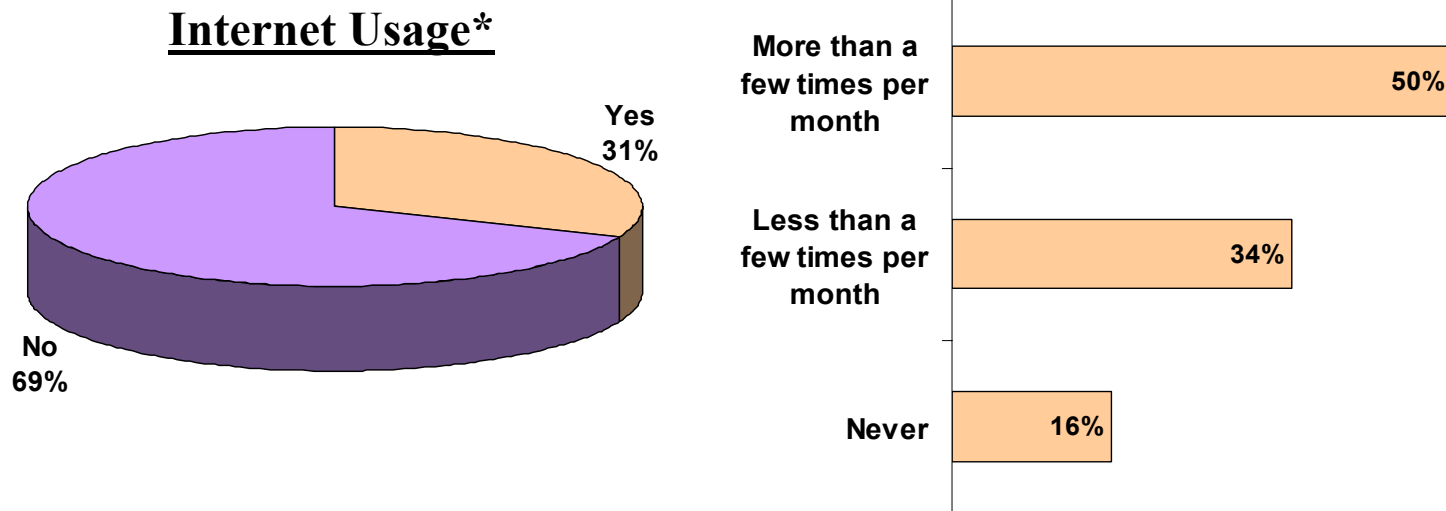
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“Special Interest” = Music and Movies, Garden, Technology and Computer, Shopping, Health, Food and Cooking, and Travel site visitors.

Those who use the Web for candidate info do so frequently

- 31% of all Internet users have used the Internet for information about a representative or candidate; half of those use it for that purpose multiple times per month.

“During the last presidential campaign in 2000, how often did you use the Internet to look for information about a candidate?”

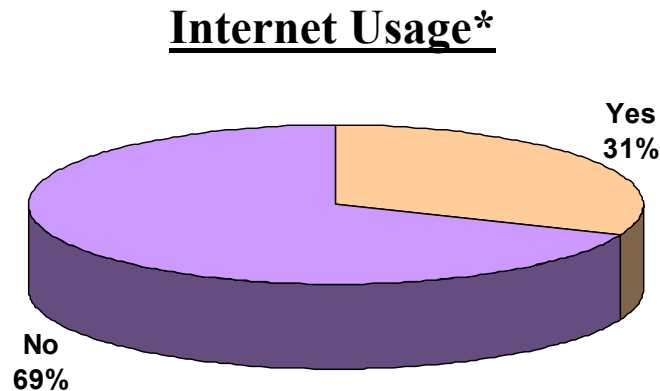


n = 642, Question IB9 – “Have you used the Internet to look for information about an elected representative or a candidate running for public office?”

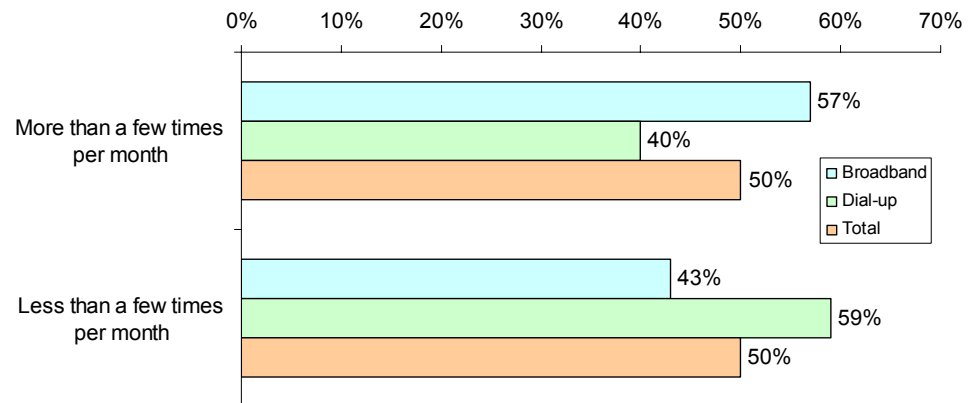
n = 230, Question IB9a – “During the last presidential campaign in 2000, how often did you use the Internet to look for information about a candidate?”

Broadband leads to greater use of the Internet for candidate info

- Respondents with a *broadband connection* tend to use the Internet for information about candidates and representatives more often.



n=642, Question IB9



Question IB9a, Total n = 230; Broadband n = 107, Dial-up n = 101

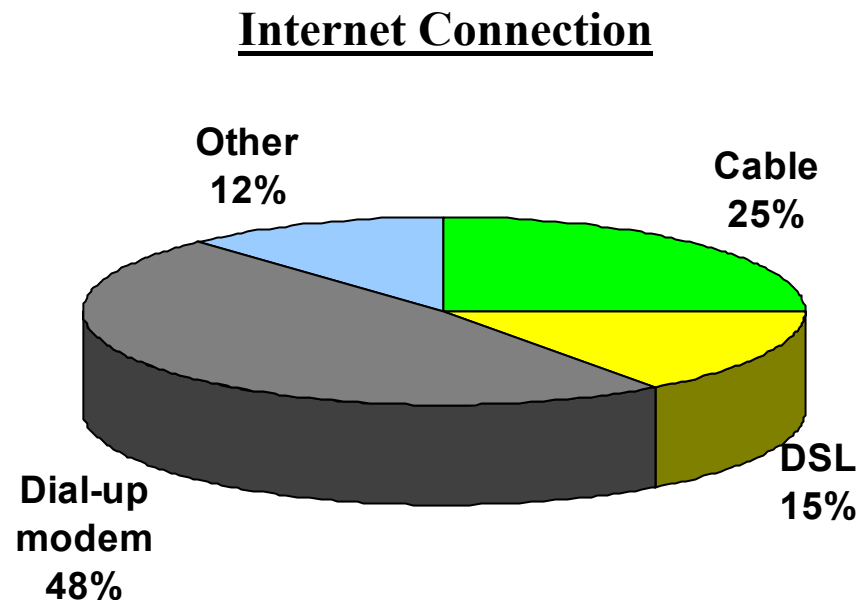
* According to a Jupiter Research Consumer Survey in October of 2000, 24% of Internet users indicated that they have visited or intend to visit a candidate's web site to learn more about upcoming elections (Source: Jupiter Research 2000 study).

QIB9 – “Have you used the Internet to look for information about an elected representative or a candidate running for public office?”

QIB9a – “During the last presidential campaign in 2000, how often did you use the Internet to look for information about a candidate?”

Broadband usage continues to rise...

- More than half of respondents (52%) access the Internet through a broadband connection, up from only 9% in 2002.*



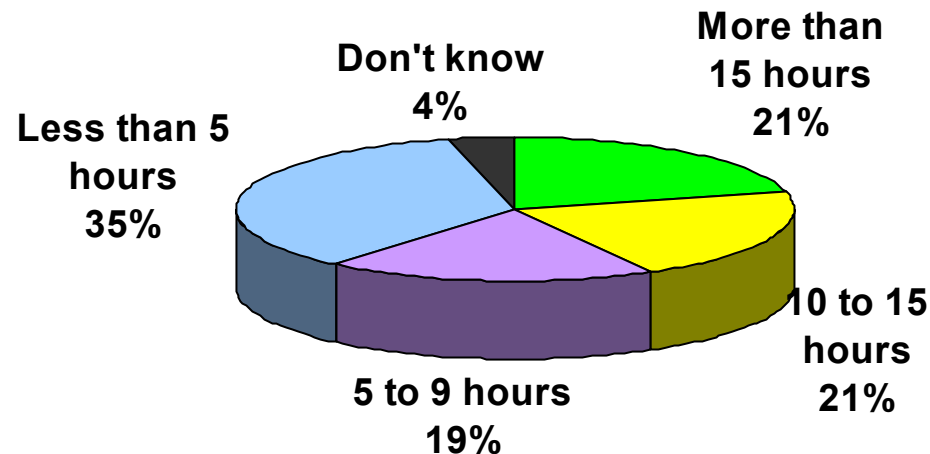
n = 642, Question NU2 – “What type of connection do you use most often when you connect to the Internet?”

*In 2000, 90% of Internet users used a dial-up modem to connect to the Internet, whereas only 9% used a Broadband method (Source: Jupiter Research 2000 study).

...contributing to an increase in the amount of time spent online

- 42% of respondents spend 10 hours or more online weekly.

Hours Spent Online Per Week



n = 642, Question NU3 – “How many hours a week on average do you spend using the Internet from home, work, or anywhere else?”

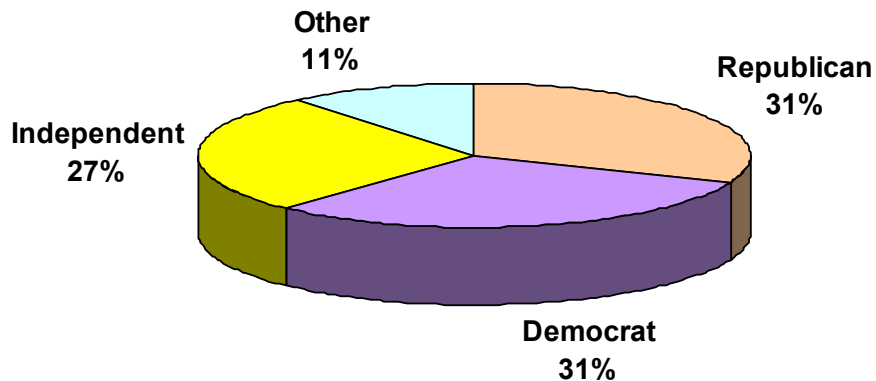
Appendix

Methodology

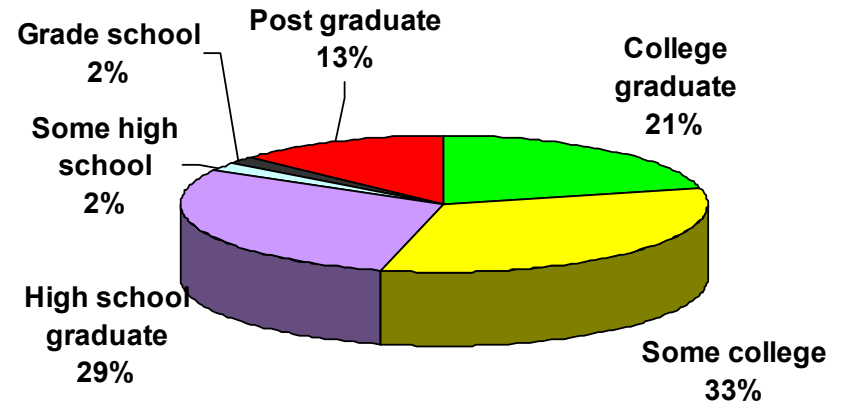
- 642 interviews were conducted with adult Internet users by trained interviewers at the Center for Survey Research and Analysis (Storrs, Connecticut).
- Interviews were conducted between April 14 and May 28, 2003.
- The sampling frame included all US telephone exchanges.
- A random digit dial (RDD) methodology was used to ensure that each possible residential telephone number has an equal probability of selection.
- The margin of sampling error for the 642 interviews is ± 3.9 percentage points at the 95% confidence level.

Demographic snapshot of Internet users

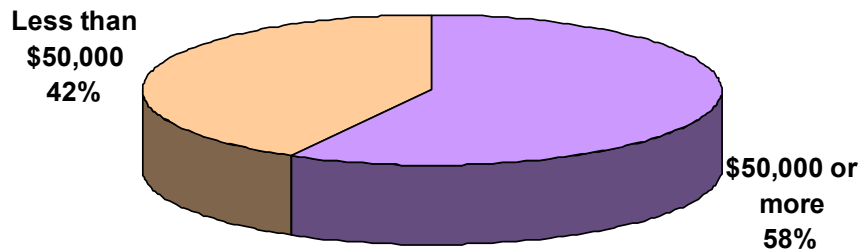
Political Party



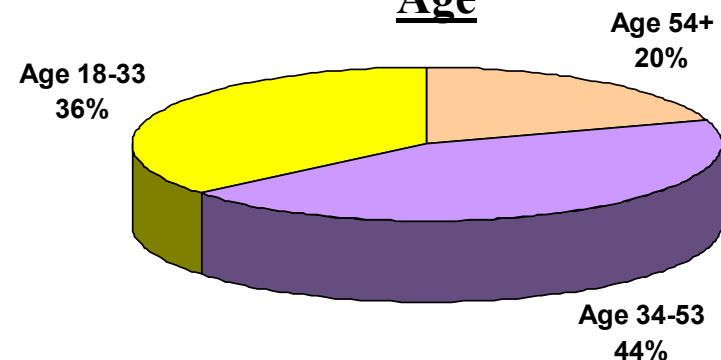
Education



Income level



Age



n = 642 (Internet users)