



GOVERNMENT+NONPROFIT GOLD WINNER

Obama for President

Background and Objectives

When Sen. Barack Obama announced that he was running for President, he faced the longest odds in history. He was a little known Senator with only two years of Washington experience; he was taking on Hillary Clinton, dubbed as the “inevitable” Democratic nominee, and the popular Clinton brand; lastly, he sought to become the nation’s first African-American President.

Although the process of running in primaries and in a general election is overloaded with conventions, there was little that was conventional about the Obama campaign. With a team of pollsters and media consultants largely from outside of Washington, the Obama campaign looked to leverage all that was unique and different about the extraordinary candidate we were working for, and to establish right from the start a “brand” that reflected Barack Obama’s values and an overriding message that went to the core of our nation’s broken politics.

Nonetheless, we were going to have to compete not only against Sen. Clinton but against six other Democrats, including some of the party’s major figures such as John Edwards, Joe Biden and Chris Dodd. We also faced a front-loaded primary calendar that many Democrats believed was designed to ensure Sen. Clinton’s nomination.

There was a lot we knew – or at least were fairly confident about from the outset. Tactically, we knew that only one candidate would emerge as the “alternative” to Clinton; we knew, as had been correctly forecast by chief strategist David Axelrod, that the campaign was going to be about change, with voters looking for the “remedy” to the previous eight years; we knew that Obama’s appeal to younger voters and the boom of social networking tools was going to play an integral part in the campaign by creating a “movement” for change; and we knew we were going to have to expand the “electoral map” in the general election and compete in states like Virginia, North Carolina, Colorado and Indiana that had consistently voted for Republicans.

Against this challenging political landscape, but armed with some solid assumptions, we knew that we needed to accomplish some very specific goals to win:

- Win in Iowa and/or New Hampshire – this would burst Clinton’s inevitably bubble
- Pile up delegates in caucus states, leveraging our superior organization
- Define “change” and “broken politics” in ways that played directly into Barack Obama’s message and his personal strengths
- Counter our weakness on “experience” by making others in the race “pay” for their Washington experience
- Use an array of issues or Obama’s biography, including choices he made in his life, to create a powerful “values framework” for voters to identify with

- Excite and mobilize African-American voters without ever making the historic nature of the election a foundational element of our campaign
- Greatly improve upon previous Democratic targeting and voter registration techniques in order to maximize our vote in states like Florida, Ohio, Pennsylvania and Indiana.

In politics, winning and losing is all that counts. Increasing market share isn't enough if you don't beat your opponent. So on the most basic level the campaign objective was to win. But the goals of the Obama For America paid media campaign were far more textured and layered and they shifted as we went from the primaries to the general. Broadly speaking, the overarching goals for our advertising were to:

- Reveal Barack Obama to voters in a way that created a strong "values" connection
- Continually reinforce that Obama was the only candidate who represented the kind of change that they were desperate for
- Establish Obama's judgment and credentials as a serious leader in order to clear the Commander in Chief threshold

Over the two year campaign we produced three to four times the number of ads that went on the air. Under the direction of David Axelrod and Jim Margolis, the Obama Media Team created ads that had immense durability and were used in both the primaries and the general election. They produced some of the best ads of our campaign under extreme deadline pressure – sometimes overnight immediately following a debate so that an ad could air by 7 AM the next morning.

No political campaign is flawless; but we achieved success by being both disciplined and focused on our goals while constantly being willing to test and re-test our assumptions and remaining flexible enough as a team to make corrections when necessary.

Obama Research – Uniquely Collaborative, Innovative and Comprehensive

Campaign Manager David Plouffe and David Axelrod established at the outset of the campaign a team of pollsters based largely outside the beltway, but with deep experience in Democratic campaign circles. At the start of the campaign in early 2007, the research team included Joel Benenson (Benenson Strategy Group), Paul Harstad (Harstad Strategic Research), Cornell Belcher (Brilliant Corners), and David Binder (David Binder Research).

Once in place, the research team and the media team were organized and managed so as to ensure collegiality, promote frank discussion of issues, and emphasize the various firms' strengths. Deputy Campaign Manager Larry Grisolano oversaw both the research and media functions and created the environment that fostered trust and produced valuable collaboration instead of debilitating competition. Because of the research team's ability to work together, the total in this case was far greater than the sum of the parts.

Because the campaign had significant resources, we were able to use an extensive combination of qualitative (focus groups, dial groups with focus groups) and quantitative research to test assumptions and hone our message.

One of the key learnings that shaped the OFA media strategy emerged in early focus groups (conducted by David Binder) in Iowa, New Hampshire and South Carolina. To introduce voters to Obama, we showed short film clips of him speaking. Voters reacted with strong emotional language about how Obama was speaking with conviction and from his heart; he sounded like the President they had waited years for. One woman wept. We followed this with online ad tests and dial groups and the results were clear: the power of Obama's voice made any ad stronger by creating a deeper connection. These findings meant that months before we ran a single ad on TV, the media team had agreed that we would make sure we almost always had a track on the air in which Obama was speaking, whether in a town hall, delivering a speech or straight to camera. More broadly, our

polling in both Iowa, New Hampshire and in the only national poll we conducted during the primaries, not only confirmed the theory of our race – that change would trump experience – but it helped identify the roots of voters' discontent and enabled us to define “change” in a way that proved effective in the primaries and in the general election as well. Perhaps most important, this early data demonstrated that change meant not just change from George Bush, but from the broken politics in Washington and that one of the strongest desires for change was to get past partisan politics: even among Democratic primary voters, the party's loyal base, voters by 71% to 29% said they wanted a president who would restore our sense of common purpose and bring both parties together vs. a candidate who will fight for Democratic values against Republican opposition and advance a Democratic agenda. This meant the more that Sen. Clinton pushed the idea that she knew how to “beat the Republicans” the more she was creating a disconnect with the voters she needed to win. And we knew from early polling that Obama's accomplishments that showed he had worked with Republicans were the most potent.

In January 2007, an Iowa poll tested a battery to assess what concerned voters most about Washington. In New Hampshire and nationally we probed more deeply into Americans' thoughts on the main barriers to meeting our toughest challenges. With staggering consistency, voters cited two main obstacles to progress: politicians trying to score political points instead of solving problems and the insidious influence that lobbyists and big corporate interests were wielding in Washington.

Obama had refused to take any contributions from federal lobbyists long before OFA knew of these data; nonetheless it created a powerful contrast that we were able to use throughout the campaign, including in an ad against John McCain, who had seven lobbyists running his campaign.

Along with unity, standing up for ordinary people over the lobbyists and special interests was a core part of Sen. Obama's message: that he would be straight with people even when knew that they disagreed with him. This meant giving a speech to auto makers and telling them to stop blocking higher fuel efficiency standards for cars or telling an audience of teachers at a union convention that he believed in merit pay, even though their union had opposed that.

Throughout the primaries, our ads focused on exposing voters directly to Barack Obama, using biographical facts to demonstrate his values (e.g, bypassing lucrative jobs after law school to continue his work with the Chicago community). Through a mix of direct to camera spots, narrative spots, validators – including Republicans – and highly targeted advertising tracks aimed at young people and women in particular, voters were exposed to a potent mix of advertising that communicated the multi-dimensional message of change that Barack Obama talked about when he began his campaign. In the primaries, this culminated in the campaign's first two-minute closing spot that aired the night before the Iowa caucuses, which Obama won by eight points and which ended Clinton's air of invincibility turning the contest into the two person race we had anticipated.

While targets varied from state to state during the primaries, we knew that we had room to grow with college educated women, young voters and white voters under 60 with household income between 50K and 60K. More important, we knew from our focus groups that despite African-American voters holding back support early – largely out of fear their hopes could be disappointed again – that once we won in Iowa, they would galvanize around his candidacy. This proved true in South Carolina in late January, the first state with a high African-American population, and Obama's convincing 28-point win meant that we had split the four early states and was now poised for success on Feb. 5th. On Feb. 5th, Obama won 13 of the 22 states and took a delegate lead he would never surrender. More significantly, he then reeled off 11 straight wins in February in states large and small giving the campaign an imposing margin.

One of the keys to using research to fine-tune the pillars of the campaign was that we continually looked for ways to test and make sure that as we described the character dimensions revealed by the issues Obama talked about and the salient biographical facts about him, the language we used

to describe them reflected the language real people would use when discussing them. By repeatedly testing different ways of phrasing attributes developed by Binder in our focus groups and a combination of regression analysis conducted by Harstad research and image mapping by Benenson we evolved a core set of phrases that helped sum up Obama's change messages for effective use in 30- or 60-second ads when a lot of information was being communicated.

The challenge in the general election was two-fold: first, despite a long general election campaign voters were far less familiar with Obama and secondly, McCain had a powerful personal bio and a presumed image as a different kind of Republican than President Bush. But again, we still knew that the fundamental premise of our campaign as change from broken politics was still sound. Our initial research for the general election confirmed that framing the election as "change vs. more of the same," was a simple potent construct. But we learned that while voters wanted change from George Bush, we couldn't lose sight of the fact that voters still wanted change from Washington and all the symptoms of dysfunction.

We also knew long before the economic crisis hit that the economy – especially the imbalance and unfairness that had emerged as lobbyists and special interests dominated the agenda – would be the main issue of the campaign post-Labor Day. And despite McCain trying to position himself as a "Maverick" our research in August actually showed that more voters thought Obama was a maverick than McCain. More importantly, to accommodate Republican primary voters McCain dropped not only dropped his opposition to Bush's tax cuts, he embraced them fully and called for making them permanent. At the same time, our research showed us that the war in Iraq – a clear point of difference between Obama and McCain – was not only a foreign policy issue, but an economic issue, draining \$ 10 billion a month that we needed at home. These issues were particular important to the group of "Up For Grabs" voters we identified as our target group which included younger men, Independent women, Suburbanites, and whites earning less than 60K.

While McCain had a powerful story as a military hero, our research showed early that Obama was already clearing the threshold test of being ready to be commander in chief in voters' minds. While we trailed McCain on this metric right from the start, the margin was narrow, meaning we didn't have to engage in an effort to convince voters that Obama was ready to be commander in chief. They were already believing it. That meant that we could use many of the same techniques and themes from our bio/values based ads to firm up voters' connection to Obama. This also meant that the campaign's initial theme of "Change We Can Believe In," only needed a slight shift to "For The Change We Need," creating a consistency that solidified Obama's image as a steady leader.

At the same time, the line "More of the Same," which we applied to McCain, was never really just about Bush. As you will see in these ads, this theme always related to specific policies McCain was advocating that reflected no shift in direction, including tax breaks for big oil and no middle class tax cuts and insistence on spending \$10 Billion a month in Iraq with no plan to end the war. But these issues were never merely framed as policy debates. They always underscored a "values" debate about who was really on the side of average Americans. The campaign also effectively used McCain's own boast during the GOP primaries that he voted with Bush more than 90% of the time – "more than most other Republicans" against him effectively in several ads during the general election. Using McCain's own words, undercut his claim of being a "maverick," which was his only avenue to for staking out a "change" positioning.

We continually refined our "Up For Grabs" target as the electorate shifted, focusing on groups like rural independent middle income women who were extremely focused on the economy. Using standard research and an innovative approach to micro-targeting, we won larger margins with key voting groups than Al Gore or John Kerry, getting 45% among rural voters, winning the Catholic vote and winning a higher percentage among whites than either of the two previous candidates.

Media Strategy—

Our early state primary advertising strategy hinged upon a strong finish in Iowa. With the goal of introducing Iowans to Obama's biography, we began advertising at moderate levels in the early summer of 2007. At this point, the media environment was free of advertising clutter and low levels allowed our message to sink in. When the summer ended, we began a similar strategy in New Hampshire but were forced to buy at higher levels because of Clinton's early popularity. In Iowa and New Hampshire, our main targets were the older primary voting faithful first, Older, and voters disenchanted with Bush and the Republican choices second. In all cases, we used Television, Radio, Print, Online, and Outdoor Advertising to transmit our message.

Following the Iowa /New Hampshire split between Obama and Clinton, our window of opportunity, and financial resources, would only allow us 2-3 weeks of advertising. Because of Clinton's ever growing Super Delegate count, we were forced to focus our television buys in the most important states/markets - where we could not justify Television we bought radio.

Following Super Tuesday, we focused on the Potomac Primaries, Wisconsin, and other Caucus states that appeared ripe for Obama wins. Short and strong advertising campaigns (TV, Radio, and Youth advertising) were successful and as Clinton's war-chest dwindled so too did her campaign's advertising budgets. The March 5th contests (Texas and Ohio) were billed as HRC's last stand. Similar to February, we had to try to run full-scale campaigns in a period of 3 weeks against an opponent who was obviously well-known and still a favorite among many Democratic voters. This was accomplished by running heavy campaigns on Television, Radio, and Online for several audiences, including likely Democratic Primary voters, Hispanic voters, African-American voters, Youth voters, as well as a rigorous GOTV push.

For the first time in 3 months, a major contest wasn't quickly looming. Pennsylvania was eight weeks away, followed by North Carolina and Indiana. We had the resources to run all three primaries as we would a typical statewide race and the time to begin with a biographical launch and then move into issues. All three campaigns had a mix of Television, Radio, Print and Online, focusing on a wide range of audiences. After losing in PA, but winning in NC and coming close in IN, the only question was when, HRC would concede. The media buy plan shifted into General election mode.

General Election: McCain's General Election advertising strategy, beginning in March, focused primarily on his biography in states like NM, IA, OH, PA, and CO. Conversely, our advertising began in 18 states (some of the more notable additions to the battleground map included NC, AK, MT, ND, GA, IN, and VA) - the plan was to remain on the air in ALL of these states until the end. The significance of this cannot be understated: after the Conventions and the Palin bounce was gone, the horserace in all of these states (with the exception of AK) showed a dead-heat.

Over the course of the General Election, no states received the same mix of TV, Radio, and Online advertising - nor were our demographic targets uniform. Some markets focused on likely swing voters, while others had one or more additional targets (and thus additional media tracks) that focused on: Seniors; Women; Males/Sportsmen; Younger Voters; Hispanics; African-Americans; etc. Our Television advertising consisted of programming that included a strong emphasis on Primetime and Sports programming (especially high-profile programming), Cable buys that were 20+ networks deep, and much more entertainment programming. News was a part of the buy, but with the extensive coverage of the campaign on the news, voters were getting their fill through editorial. Also, and for the first time in political advertising, we were able to reach the elusive Satellite TV viewer on cable programming. Our radio buys went much further than any candidate in history. We spoke to voters across the board - and for the most part had the radio airwaves to ourselves.

In both the Primary and General, we added a robust layer of two-minute and :60 avails on top of our :30 advertising to give voters a more detailed plan of what Obama would do as President. And for even more information, Satellite viewers on the Dish Network and Direct TV could go to the 'Obama Channel' to learn more. The long-form video on the 'Obama Channel' generated interest in the media and also got more views (and longer views – over 12 mins per view) than any other advertiser had during a similar timeframe. Finally the half-hour ad buy a week before the election allowed another opportunity to keep voters excited while providing information about Obama and his plan. The 30-minute paid program buy had over 30 million viewers and sealed the deal for some voters still on the fence just days before Election Day.

David Plouffe's strategy to focus the campaign entirely in what we called the "battleground" states paid massive dividends. Not only did President Obama win the election by the biggest margin of any Democrat in 60 years except for Lyndon Johnson, he won in states that had not voted for a Democrat for President in decades. And the campaign succeeded in bringing millions of new voters to the process and engaged in their government and country again.