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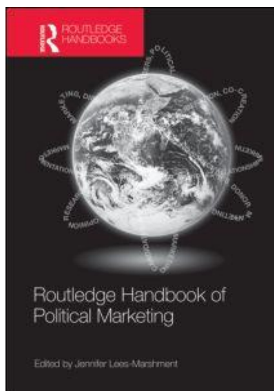

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Jennifer Lees-Marshment

The role of opinion research in setting campaign strategy

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Part I
Understanding the market, gathering ideas and debate

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The role of opinion research in setting campaign strategy

Alexander Braun

The topic: opinion research-based strategy

Should our candidate focus on healthcare or on education in next week's televised debate? Campaigns have to consider and decide myriad such questions every day. This chapter is about how good campaigns find the right answer to that question.

While the question seems simple and straightforward, answering it immediately requires answering a host of other questions first. Should the candidate participate in the debate at all? How will the debate fit with what voters think about the candidate and with the image the candidate wants to project? Should the debate be used to explain the candidate's positions or to point out opponents' weaknesses?

There is no way a campaign can afford the time to start deliberating about each of these issues from scratch as they arise. Rather, campaigns rely on a number of assumptions and prior decisions that all stem from an overall strategy. All decisions in the campaign, from messaging to scheduling to resource allocation, should be based on a core strategy plan. Such a plan is simply the blueprint that lays out the route to victory for the campaign, but it can be successful only if it is based on good information, rather than assumptions. A campaign plan based on instinct and anecdotal evidence is likely to fail.

That's why research should play a crucial role in good campaigns. It minimizes guessing and provides answers necessary for campaigns to effectively create strategies and keep them on track. Research also raises the alert for possible risks and opportunities, and provides answers to questions where campaigns simply don't know or opinions differ. Good campaigns use the acquired knowledge to develop the right message that reaches the right target though the right vehicles. This chapter argues that voter research is an indispensible tool for creating an effective campaign strategy, and explains the different methods and approaches available and how they can be used most effectively in politics.

Previous research on opinion research-based strategy

Surprisingly, there is relatively little focused academic research on the use of market research in politics, although its normative impact on politics has been debated significantly (e.g. see Savigny

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2008) and it increasingly plays an important role in political marketing models (for example Lees-Marshment 2001). One reason for that may be that polling is usually one of the most closely guarded secrets of campaigns and political parties, and as such is generally unavailable for closer academic scrutiny. There is non-political marketing literature on which we can draw, such as those who discuss polling in campaigns from the practical perspective (Stonecash 2008; Thurber and Nelson 1995), work on the methods and science of opinion research (see Fowler 2002; Schuman 2008), and insider accounts such as Gould (1998) and Morris (1995). One thing all this literature has in common is agreement on the importance and power of research. For example, Stonecash notes how without research,

> campaigns become guessing games. Campaign managers and supporters are reduced to speculating and arguing about what is important, but with little basis for assessing where the race stands, what issues are important, and what strategy they should follow to win a race. With information, a politician can formulate a plan.
>
> *(Stonecash 2008: 11)*

Research is used to create the strategy and campaign plan, and as Shea and Burton (2001: 100) note, 'polling has become the most efficient means by which campaigns come to understand the hearts and minds of voters'. This chapter will draw on some of this work, as well as practical experience, to provide an informed explanation of the different forms and uses of opinion research.

New research: explaining the utility of opinion research in strategy development

While research in campaigns is most useful to inform communications and understand who the voters are, its utility extends well beyond that and can be useful for virtually all aspects of campaigns.

Positioning

The most important part of every campaign strategy, and one where research is indispensible, is the central positioning of the candidate or party. Positioning is the core rationale that the candidate will use to convince voters to vote for him or her over opponents. Will the candidate run mainly on left- or right-wing ideology, on the concept of change, or on a specific policy issue like immigration? Or will the positioning focus on the candidate's personal ability to connect with voters or on their competency?

Knowing answers to these questions is critical, because while voters have views on most issues, they care meaningfully only about some fraction of them, and base their voting decisions on even fewer of them. Basing a positioning on a concept that voters agree with but don't find particularly relevant to their needs will result in a losing campaign. Similarly, a positioning that voters care about but don't find believable when delivered by a particular candidate will not result in success on election day. Constructing an effective positioning depends on the ability to gauge and quantify voters' basic attitudes, and to put them in the right context of the race and candidates.

Good voter polling does exactly that. One of the first areas on which voter research measurement focuses is people's general disposition and the most basic campaign communications archetypes. Do voters think that the country and economy are on the right or wrong track? Are they looking for a change or do they just prefer building on the current course of things? Are they looking for strong leaders or for candidates who easily connect with regular voters? These questions provide the broadest framework within which voters might think about the election.

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The next area that positioning research covers is the political actors, whether they are individual candidates, current politicians, parties, other institutions, or all of the above. What, if anything, do voters already know and think about the candidate? How does that perception compare with that of the opponents? What attributes do voters associate with the candidate? Do they like the leader better than the party, or vice versa? These questions help to narrow down the possible options for positioning to those that are actually applicable to a given candidate.

The third area of research focus is the issues. With what are voters satisfied and with what are they dissatisfied? What issues do voters care about the most? Do they care more about a specific issue or about the state of politics in general? Do the candidate and opposition have a particular strength or weakness on some of these issues? These questions help with calibrating the actual content of the positioning.

It is important to keep in mind that positioning never exists in a vacuum. It will always be evaluated not only on its own but also in the competitive context of the race. This means that a candidate's positioning is not just his own, but is also measured against other candidates' positioning concepts, and also has to contend with voters' general lack of attention to politics. Joel Bradshaw nicely summarizes the characteristics a good positioning should have (Thurber and Nelson 1995: 43). It needs to be:

- clear, to be easy to communicate and understand;
- concise, to reach voters in the short time they might pay attention;
- compelling, to have a sense of emotional urgency;
- connected to voters to reflect their needs;
- credible, so that voters believe it; and
- contrasting, to establish difference among candidates.

Since campaigns face the fact that they have limited financial and human resources and limited time in which to appeal to voters, it is important that they only select one positioning and stick with it. Also, building a candidate's image in voters' minds is a hard task, but changing an existing one can be even harder. Popkin offers a great analysis of voters' psychology and why the first framing of an issue, candidate or race is so important: 'Narratives are more easily compiled and are retained longer than facts. Narratives, further, require more negative information before they change' (Popkin 1994: 78). That, of course, doesn't mean that the narratives or context of the race cannot change, especially if there is new compelling information. Popkin specifically highlights that personal information is more powerful in being able to change voters' views than new information about issues. However, trying to change a candidate's positioning halfway through the campaign is always a difficult task.

Messaging architecture

Although there should be just one positioning and that positioning should not change through the course of the campaign, candidates of course need to speak to a broad range of issues. Additionally, a positioning can rarely stand on its own and needs to be substantiated by specifics. Also, various target groups will require different levels of customization of communications, both in terms of issues and tone of messaging. A good communications strategy will, therefore, be based on a messaging architecture that prioritizes themes, messages and support points in a way that accentuates the candidate's positives and the opponents' negatives, while laddering up to the overall positioning.

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What this means can be best illustrated on a message house, a diagram that is often used in corporate marketing for brand positioning of a product or service. On top, as a roof over everything, is the central positioning statement. It rests on themes, which give positioning more content and meaning. Themes, in turn, rest on 'pillars' of messages, which are concrete statements on a particular topic. Last, messages are backed by support points, which can be very specific pieces of information, figures or past events that validate the messages. (While there is general consensus on this theory, different authors might use the terms positioning, theme and messaging interchangeably.)

Thinking of messaging architecture this way is useful not only because it helps to structure communications, but also because it gives communication a hierarchy and context. While candidates will be forced to react to a host of specific issues, they should always strive to connect their communication to a concrete theme. This way their communication will not only reinforce the overall positioning, but will also put the discussed issue in a context that is favorable to the candidate, or at least help mitigate its potential negative impact.

The example in Figure 2.1 shows a schematic message house for the Czech Social Democrats (CSSD) in their 2008 gubernatorial campaign. CSSD was in opposition both on the national and on the regional level, having no governors in office. Its main opponent, ODS, led a national government and had 13 out of 14 governors. CSSD was in a tough position because its little-known candidates didn't have any strong issues in their favor and were running against very popular ODS incumbents. CSSD, therefore, made a strategic decision not to run individual regional campaigns, but rather to run on a central national positioning. The goal was to frame the election as an opportunity for voters to send a message to the central government that they disagreed with controversial new social policy reforms.

The positioning rested on roughly three themes: recently introduced healthcare fees that were very unpopular; an overall feeling of being left behind among large parts of the population; and an emphasis on the connection between governors and their national party. The theme of healthcare fees was actually so powerful that it needed support from only one simple message, and the media widely recognized the debate over health fees as a symbol of the election. The second and third themes were each supported by several messages, some of which were positive and some negative. Each message was backed by various support points.

Positioning	Making These Individual Elections a National Referendum on Government's Radical Policies				
Themes	Healthcare Fees	Ignored Voters' Needs		Connecting ODS Governors with National ODS	
Messages	Fees need to be abolished	Central govt cares about numbers, not people	CSSD will provide hope and social security	Governors condone their party's national policies	Need to put checks on ODS hegemony
Support Points and Figures					

Figure 2.1 Positioning of Czech Social Democrats in 2008 gubernatorial elections

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Research was instrumental in developing this communications strategy. The campaign conducted multiple polls that clearly identified high job approval of local governors but low job approval of the national government and resentment toward the central government's reforms. Additionally, healthcare consistently topped the lists of most important issues and voters were especially riled up about the newly instituted fees. The strategy was developed based on these research findings and the campaign continued regular polling until the election day to stay on top of the situation and the campaign strategies of other parties, and to refine CSSD's messages and their tone. The success of this approach is evident from the final results: CSSD, which originally had no governors, won every single gubernatorial seat in the country, as well as 23 out of 27 Senate seats that were in play that year.

Understanding voters' makeup

No positioning can be successful if it tries to appeal to everyone. Campaigns have limited time and limited budgets with which to reach voters. Even if this were not the case, candidates could never be able to come up with a positioning that would both appeal to everyone and at the same time be compelling enough to move them. Rather, a positioning needs to be targeted only at a limited group of voters to achieve resource and message efficiency (Faucheux 2002: 141). Failing to sufficiently narrow down the campaign's audience will only result in money and resources being wasted on people who will not end up voting for the candidate, and will dissolve the strength of the campaign messaging.

The process of targeting begins with the relatively straightforward step of looking at the broadest universe possible, at all people living in the area where the race takes place. The next step is to remove from the consideration set those who are and will be ineligible to participate in the given election. For example, in Estonia all inhabitants of the country can vote in municipal elections but only those who have Estonian citizenship can vote in national elections. Since almost one-third of the population is Russian without an Estonian passport, parties appeal to substantially different audiences depending on the type of election. In the US, too, it is always important to keep in mind the differences between the general population and registered voters.

Next, the campaign needs to narrow down the audience to only likely voters. Turnout is one of the key variables in any campaign and always needs to be carefully accounted for in any strategy. Typically, only about half of registered voters vote in US presidential elections, and only about one-third in mid-term congressional elections. From the campaign perspective, it is irrelevant what the other half or two-thirds of registered voters think, since they will not show up on election day. An effective campaign will therefore only look at the opinions of the one-half or one-third of voters identified as likely to turn out. The only exception should be if the campaign believes it can successfully alter the turnout levels, either by increasing turnout among supporters or depressing turnout among supporters of other candidates.

Eventually, every good campaign will want to divide likely voters into three basic groups: current supporters, persuadable or 'swing' voters, and unreachable voters. Similar to the principles above, the campaign doesn't want to waste resources on those voters who will never vote for the party or candidate no matter what the campaign does or says. As long as there are enough voters in the base and persuadable groups to make victory possible, effective campaigns should focus their strategic communications on these two sets of voters. At this point, the campaign has narrowed down its target audience to maybe 20 percent of the overall population, which clearly makes campaigning easier, more efficient and more impactful.

Research is indispensible to the process of narrowing down the audiences and figuring out who they are. Even long-term incumbents can't be sure that the voters who elected them many

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times before have not changed their view of the candidate, come to prioritize different issues, taken a liking to a new contender, become discouraged from turning out, or simply thinned out in number until there are no longer enough of them. It is critical that campaigns always start with assessing the lay of the electoral land, and that they develop their strategies only after they understand who the key voter groups are and what their size is (see Figure 2.2). That knowledge will allow the campaign to develop targeted strategic tracks to keep base voters in its fold and increase turnout among them, and to persuade the largest possible share of swing voters to become supporters.

Besides measuring size and voting intensity, there are multiple ways in which research can describe the makeup of these voter blocs. First, target groups can be described through their geography. Are the base voters located in specific areas or they are spread more or less evenly? What share of persuadable voters live in large cities versus rural areas? Are there any favorable trends when looking at different habitat sizes in different regions?

Second, it is essential to get a reading of the demographic information of different voter groups. The most obvious and common are gender and age. Do supporters tend to be younger or older? Is there a gender gap? Are there differences when age and gender are combined so that, for example, research might discover great opportunities among middle-aged women? Depending on the race and country, other demographic criteria might be also important, such as income, education, ethnicity and race, marital status, children, occupation or religion.

Third, campaign research needs to go beyond the descriptors of what voters are and also know who they are by understanding their attitudes and beliefs. What are the most important issues among our base voters? What do swing voters think about a person who could possibly endorse the candidate? Where do voters stand on the question of cutting government spending

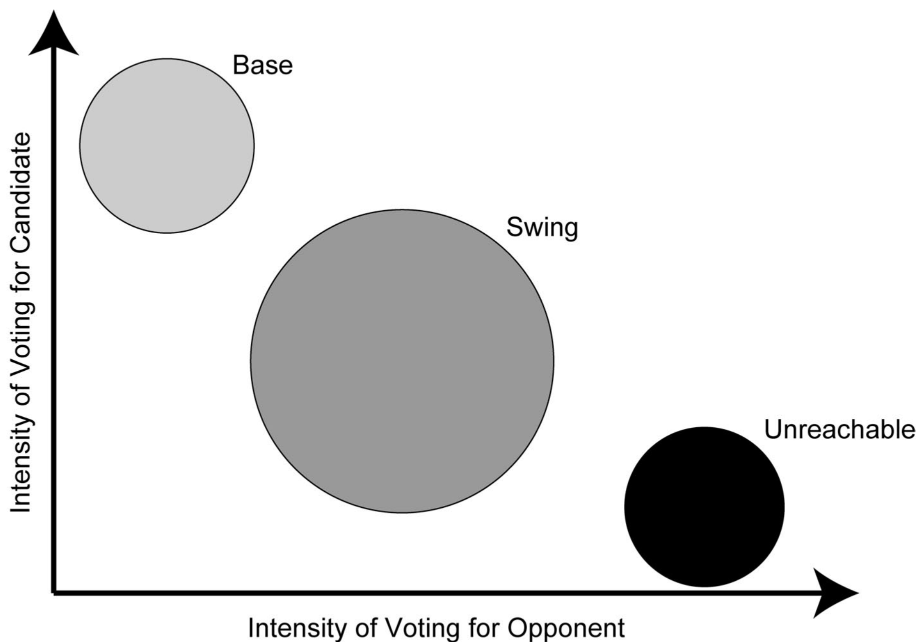

Figure 2.2 Example of basic voter division (unlikely voters already filtered out)

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versus increasing taxes? Of course, it is critical that the campaign fully understands the views of the voting blocs of all the candidates and parties.

Fourth, it is very useful if the campaign can develop an understanding of the information sources and media consumption habits of voters. What percentage of current supporters is online? Where do swing voters get their political information? Which TV network do they consider most credible?

Fifth, it is helpful if campaigns take steps to understand the values and lifestyles of voting groups, sometimes referred to as psychographics. Regrettably, many campaigns do not pay sufficient attention to this step. Branding and corporate reputation campaigns have learned that understanding these 'softer' and seemingly unrelated attributes about customers (voters) can often uncover hidden commonalities and unmet needs that can play a huge role in motivating people's purchase intent (voting behavior). Is a significant segment of swing voters afraid to walk outside after dark? How happy are they in their current careers?

For example, research conducted by Mark Penn for Bill Clinton in the run-up to the 1996 elections found that values were a more powerful predictor of voting behavior than most demographics. Clinton therefore shifted his focus from more traditional pocketbook issues to questions of school discipline, tobacco advertising and TV violence. Famously, the president was also urged into taking an outdoorsy vacation in Jackson Hole, Wyoming, to reconnect with swing voters whose favorite pastime, polling showed, was camping (Morris 1999: 212–38). The background for these strategy moves was based on a large 'neuropersonality' poll, which included a number of lifestyle and behavior-related questions, as well as a modified Meyers-Briggs classification module designed to measure psychological preferences in how people perceive the world and make decisions.

In another race, Mark Penn's company conducted a unique micro-targeting project for Michael Bloomberg's election campaign for mayor of New York City in 2001. Since Bloomberg, who was running as a Republican, needed to overcome the fact that 70 percent of registered voters in the city were Democrats, he targeted them based on a combination of demographics, party affiliation and established attitudes and needs. This resulted in often counterintuitive but powerful findings where, for example, older, affluent Jewish males on Wall Street and younger, low-socio-economic status, Hispanic waitresses shared concerns on the effects of terrorism on their business and income. The campaign therefore sent these seemingly widely different groups similar communications on Bloomberg's security plan.

The more detail that campaigns have about their voters, the more targeted and more effective their communications can be. Since the possible combinations could be endless, researchers sometimes apply various statistical tools such as cluster or factor analysis to identify the more pertinent trends and groups. The electorate might eventually be divided into several segments based on combined information sources such as demographics, lifestyles and stance on select issues, allowing campaigns to better prioritize and develop more individualized communications. That said, campaigns must not fail to see the forest for the trees, and must always understand where segment groups fall on the crucial base/swing/unreachable spectrum (while statistical exercises will usually produce groups that overlap, in practice campaigns will mostly need to decide whether a particular group is 'base', 'swing' or 'unreachable' – see Figure 2.3).

The ability to target voters through smaller groups allows a campaign to have better reach and impact with its communication. At the same time, the law of diminishing returns applies here. In most cases, the crucial distinctions are in basic demographic or geographic information. While detailed slicing and dicing of the electorate can sometimes detect a very important trend, the findings also need to be applicable to large enough groups to be actionable and make a difference.

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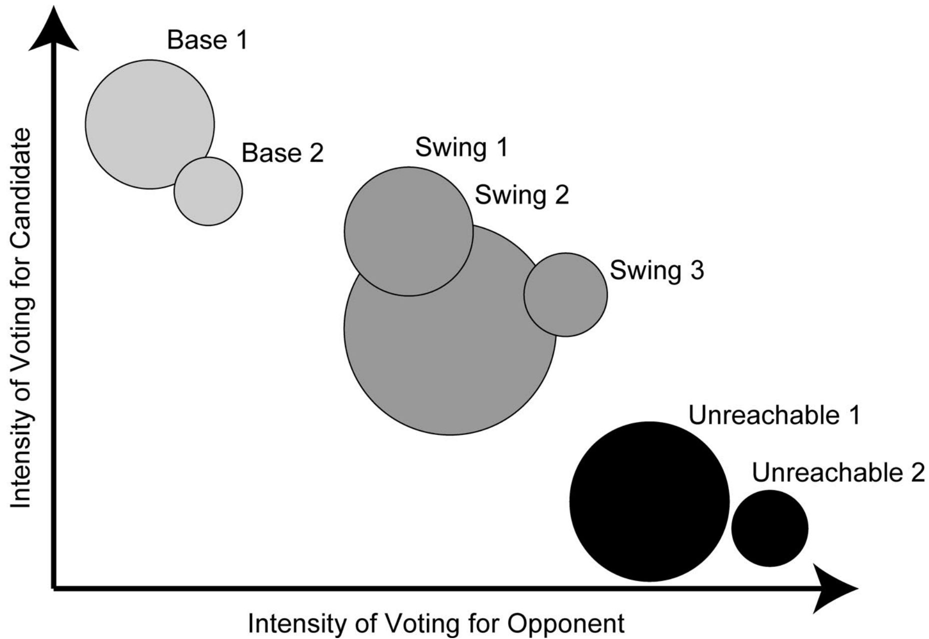

Figure 2.3 Example of voter segmentation

Timing and delivery

While the overall positioning should not change as long as the fundamentals of the race stay consistent, communications and tactics will inevitably evolve throughout any campaign. The dynamic nature of campaigns requires that candidates constantly update their information and adjust their 'lower-level' communication strategies and tactics depending on the changing situation. Besides just being reactive, campaigns also want to actively shape the race and therefore need to have a plan for sequencing and timing their communications.

Once again, research can be very helpful for all this. Let's say a candidate is accused by an opponent of accepting a campaign contribution from a businessman of questionable reputation. Besides a rapid-response reaction, the campaign needs to assess relevance and longer-term impact of the attack and decide on the best answer to the accusation. It might be that voters don't know or care about the issue and that overreacting to the charge would be harmful, but it could also be that unless the issue is cleared up, the charge will lower turnout intent among the base voters and therefore the campaign must do all it can to address the issue. Knowing which is the case is clearly critical for the campaign, and only research can provide a definitive answer. Research can also indicate how different voter groups react to different possible responses to the charge.

Conversely, if the candidate gains information, for example, about tax evasion by one of his or her opponents, research can help with the strategic use of this information. Will voters react negatively to hearing such accusations? Does the candidate with the information have sufficient credibility to level the charge? Is it in the candidate's strategic interest to attack that particular opponent? Or might it shift the focus of the campaign away from a topic that is more favorable to the candidate?

Research allows campaigns to understand the impact of new developments, to test different attacks and possible answers, and to game out scenarios. Rather than making missteps, campaigns

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can test different approaches and their effects in the microcosm of voter research before taking the steps in the real world. This extends beyond crisis communications. For example, it can include testing different executions of advertising: rather than spending huge sums of money on advertising that doesn't work, it is wise for a campaign to test the advertisements first on focus groups to determine their effectiveness.

Types of research

Campaign research can take many forms. Each form's usefulness depends on the current needs of a campaign and how much time is left before election day. Selecting a particular type of research should never be a mechanical process, and should always be done based on what best advances the campaign goals at that moment. For example, a candidate considering a run for office clearly has different research needs than a candidate running neck-and-neck with two other opponents a few weeks before polling sites open.

Before discussing individual methodologies, it should be noted that there are two strategic dimensions to any opinion research. First, research is almost always descriptive, meaning that it provides a current picture of the political landscape. This is valuable for campaigns because it tells them what the current horse race is, explains who supporters are, who are undecided voters, what are the most important issues, etc. Often, campaigns are satisfied with just this dimension, because it supplies them with the crucial pieces of information that campaigns need to develop their strategy or keep it on track.

However, research can go further and have also a predictive (some might even say prescriptive) dimension. What that means is that campaigns can use research not only to describe the current situation and be left to interpret it, but also to directly inform them about how best to move in order to gain advantage. This can include message and slogan testing, gaming out different scenarios, and testing for the most effective responses to attacks or for voters' reactions to changes in communications.

Besides these two strategic dimensions, research is usually classified into two basic methodological approaches: quantitative and qualitative. As the names indicate, the former deals with numbers and measurements and the latter strives to shed light on the meaning and context of issues. While there have been attempts to combine the two approaches (for example, I used a hybrid approach during the British Labour Party's 2005 election campaign), the two methodologies generally remain distinct from each other. Campaigns must understand the power and limitations of both methodologies in order to be able to fully harness the utility of each.

Qualitative research

The most common type of qualitative research by far is focus groups. These are controlled discussions of usually 8–12 participants selected to either encompass a wide demographic profile of voters or, conversely, to consist of only participants who fit certain criteria, such as undecided female voters or voters from swing districts. The discussions are guided by a moderator who loosely follows a script designed to elicit a broad range of opinions, reactions, emotions and associations on given topics. The discussions are recorded for analytic purposes and often are observed by consultants or candidates from behind a one-way mirror.

Other types of qualitative research include dial groups, in which participants turn a knob to indicate their current satisfaction with a speech or advertisement they are watching. Campaigns also sometimes opt for 'jury groups', which resemble court trials with two sides arguing over an issue and a jury deciding which argument was stronger. Rarely, campaigns might also employ

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one-on-one, in-depth interviews, although this is usually only reserved for elite interviews rather than 'average voter' interviews. Such qualitative exercises can be great in understanding language and arguments that voters might use on particularly contentious problems. Additionally, as online penetration grows, campaigns increasingly turn towards various online chats as an easier and cheaper way of conducting qualitative research.

Qualitative research is an often misunderstood and sometimes overrated approach when it comes to developing strategies. It can be powerful in some situations and ineffective or downright misleading in others. Therefore, it is important to recognize both what this type of research can do and what it can't do.

First, qualitative research is very useful in situations when campaigns simply don't know what to do or are looking for a completely new and untried approach. Because of its open-ended nature, campaigns can explore new hypotheses at a level of depth and nuance that would be harder to achieve in a quantitative survey, understand and probe around the context of issues, and uncover both hidden obstacles and new ideas. This is why focus groups are mostly used in the beginning of the campaign and when radical new developments arise.

Second, qualitative research is great to comprehensively understand the language and terminology used by various voter groups, as opposed to campaign professionals or other elites. Being able to understand the issues through the words of voters allows for better and more accessible communication that takes the proper tone. Third, qualitative research offers the opportunity to game out scenarios based on a number of positions that could be taken by different sides in a race, allowing the campaign to drill down to the most salient arguments. Besides suggesting which way an argument can go, it provides the crucial insight into why voters might react in a certain way.

The fourth and fifth most important benefits are less immediately tangible. Qualitative research can help narrow down lists of options that might be too large, and thus generate and refine content for quantitative research. Additionally, since candidates and consultants tend to live in a bubble of self-enforcing views and opinions, being able to observe focus groups is often a great way for the campaign leadership to start thinking differently and get back in touch with voters.

At the same time, qualitative research has severe limitations. First and foremost, it is not representative of a population as a whole, and campaigns must resist the urge to draw major conclusions based only on several focus groups. Even if large numbers of focus groups are conducted across multiple demographics and geographies, they still remain just discussions of several small groups of people, which never reach the size of a moderately large poll and 'are only slightly more reliable than anecdotes' (Greenberg 2009: 13). They provide insights, flavor and ideas for testing, but not a measurement of the situation or decision-grade data.

Additionally, focus groups often suffer from 'groupthink', a phenomenon where people adjust their statements to align with those of the majority of the group or with the loudest participants. In the real world, where voters don't have to publicly discuss their ideas, those participants might not change their positions and their opinions. It is therefore important to keep in mind that the conclusions of the group might be unreflective not only of the overall population but also even of the participants sitting in the room. To that point, both Warren and Asher describe how opinions in focus groups often spiral out and end up being more negative than in reality (Asher 2004: 132; Warren 2003: 207).

Quantitative research

While campaigns might decide not to employ qualitative research without necessarily putting themselves at a dire disadvantage, no responsible campaign manager could do without quantitative

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voter research, or polling. 'Today's politicians live and die by polls' (Warren 2003: 195), and being able to quantitatively measure voters' moods is critical for any campaign's strategy.

Typically, the first poll that campaigns conduct is also the largest and most important one. The benchmark poll is a comprehensive survey in which many questions are asked of a large group of respondents sampled to be representative of the overall electorate. It covers a lot: it describes the makeup of the electorate, gauges voters' attitudes toward candidates and issues, tests possible messaging and positioning, and allows for examination of the results by various demographic and other groups. The results are usually presented to the campaign leadership in great detail, and the information gleaned from the benchmark is used for nothing less than developing the overall strategic plan of the campaign, its positioning, targeting and framework for communications.

An important thing to realize about either type of opinion research – qualitative or quantitative – is that it provides a snapshot of voters' minds at a particular time. Since voters' perceptions change and react to new developments, campaigns need to regularly update their research information, which is why they conduct multiple polls throughout the campaign.

After the benchmark poll, subsequent polls are generally designed to contain two parts. One part keeps re-testing the key metrics, such as the candidate horse race and favorability ratings, to track and measure any movement that has taken place over the course of the campaign. The second part contains new questions that the campaign wants answered, whether on past events or possible future changes. These questions allow campaigns to anticipate emerging key issues and enable them to develop messages that address these issues as effectively as possible.

Whereas campaigns might conduct these issue polls once every month or two, many campaigns decide to do daily or weekly tracking on the most important questions in the last weeks of the campaign. As campaign professionals know, the period shortly before election day is often marked by increased shifts among the electorate, as campaign communications reach maximum volume and undecided voters start making up their minds. Being able to keep up with the volatile electorate in the last days of the campaign, and adjust strategy accordingly, can mean the difference between success and failure. These tracking polls typically have only a few questions and use rolling averages to keep the base size statistically viable.

Additionally, campaigns can commission message-testing polls that focus specifically on refining communications. These measure the appeal and believability of different themes and messages from both the candidate and his or her opponents. Often, these polls employ split-sampling, a method in which matched halves or thirds of respondents are exposed to different messages or stimuli, and answers are compared and evaluated. The analysis can consist of simple rankings of aggregate responses on individual questions, but can also include creating scores that rate messages on multiple metrics or higher-level statistical analysis where responses are correlated to key metrics to reveal true derived, rather than stated, effectiveness.

Flash polls are quick, often overnight surveys used to provide an immediate read of the impact that major or unexpected news has had on the campaign. With the advent of online polling, campaigns also increasingly use quantitative research to test advertising. Typically, advertisement testing surveys use a pre/post method in which they benchmark voters' basic attitudes, show the execution and get top-of-mind reaction to it, and then re-test the initial key questions to measure shifts. In this way, advertisements are not only evaluated for likeability but, more importantly, for their effect on voting intention. Online testing allows for many new possibilities, such as respondents highlighting the most compelling parts of messaging or advertising, which was previously only possible through unrepresentative qualitative research.

As powerful as polling is, it of course also has its limits and campaigns are wise to keep them in mind. Just like in qualitative research, responses can become biased if the questionnaire

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doesn't have good structure or if questions are not worded neutrally. While in qualitative research a good moderator can try to fix issues with poorly worded questions or interview flow, no such recourse is possible in fully structured quantitative interviews. The axiom of 'garbage in, garbage out' holds true in polling more than anywhere else.

The basic principle of polling rests on the fact that if a randomly selected sample of voters is interviewed, those voters will have proportionately the same characteristics and opinions as the whole universe from which they were chosen. Yet there is, of course, a host of very important caveats. There is always a margin of error, which grows as the sample gets smaller, and the principle of sample representativeness works only if the selection is truly random. A number of other possible problems exist that are beyond the scope of this chapter (see, for example, Schuman 2008; Fowler 2002). Nevertheless, as long as a poll is conducted by a reputable pollster, the sample size stays above a certain level (often a minimum of 400 respondents is considered to be statistically reliable) and the sample composition fits major demographic and geographic parameters (through quotas or weighting), polling yields surprisingly precise results.

Advice for practitioners

Voter research is a powerful tool but it is important to keep in mind that it is not a panacea that guarantees victory. Polls are just a tool that can empower campaigns, and if they are not conducted well or if erroneous conclusions are drawn from the results, they can actually mislead. Good polls should never just end up as mountains of data, but must provide a clear picture and actionable conclusions. Research that doesn't advance the campaign strategy is just a waste of money. Nevertheless, good research is the best method that campaigns have to get the necessary information for a victorious strategy.

In general, no campaign should start without a benchmark understanding of who the voters are and what they think; their perceptions of candidates, institutions and issues; the hierarchy of their pain points; and how this all translates into their voting decisions. A good campaign will continue to update this knowledge through continued voter research until the election day and will develop its messaging and targeting based on research. Even when campaigns have a clear plan, there will be situations when they don't know how to proceed or unexpected situations arise, and research is very useful in such situations. Overall, campaigns can use research to develop or update positioning and messaging, timing, sequencing, intensity and the means of their communications.

The impact on politics

There is no doubt that research-driven campaigns are becoming more prevalent and that they have an impact on politics. While it is clear that 'polling has become the cornerstone of new-style electioneering' (Shea and Burton 2001: 100), this type of campaigning is also sometimes criticized for reducing the focus to only a narrow set of issues and small groups of swing voters, or for encouraging politicians to follow the moods of the public as opposed to lead them (see Savigny 2008). Although these issues are certainly worth a deep and continuous academic debate, a lot of the criticism is also misinformed and misplaced.

While research is a powerful campaign tool, it is always up to the individual politicians how they use it. The reality is that in most cases politicians don't change their policies based on research but rather change the way in which they talk about the policies. Their communication can't also just be simply aimed at a narrow group of swing voters, but needs to balance enough appeal to the base not to alienate them and not to mobilize the opposition. Additionally, as

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market-oriented parties become more commonplace, they also need to be able to keep delivering on their promises rather than just focus on short-term gains (see Lees-Marshment 2001: 223).

The fact that research informs politicians about what people think might carry some negative connotations, but is overall a positive and democratic benefit. Politicians in democracies should listen to the people and represent their voters. The central question shouldn't be about research but about how modern politicians find the right balance between principled leadership and understanding people's needs. The good news is that in democracies, the politicians and the whole system have to undergo regular tests in the form of elections in which voters are the ultimate judges.

The way forward: the future of research-based strategy

Clearly, research helps to make better campaigns and there should be little doubt that modern campaigns will use more rather than less research. As more campaigns employ research to inform their strategies, the pressure to use ever more opinion research to stay competitive increases for all campaigns. Having advised campaigns on four continents, I have seen that research-based strategies have an edge over other methods regardless of the region, culture or situation, and that every year the amount of campaign research worldwide seems to increase.

As such, it is important that politicians and candidates become more informed about the strengths and weaknesses of voter research and understand how to conduct it properly. On the academic side, there is a lot of room for further investigation of the impact that research-based campaigns have both on political practice and on voter behavior. A more detailed academic analysis of how research-based strategies are actually used in reality would provide a more informed debate, one that isn't merely based on outside critiques, and one that would benefit academics and practitioners alike.

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