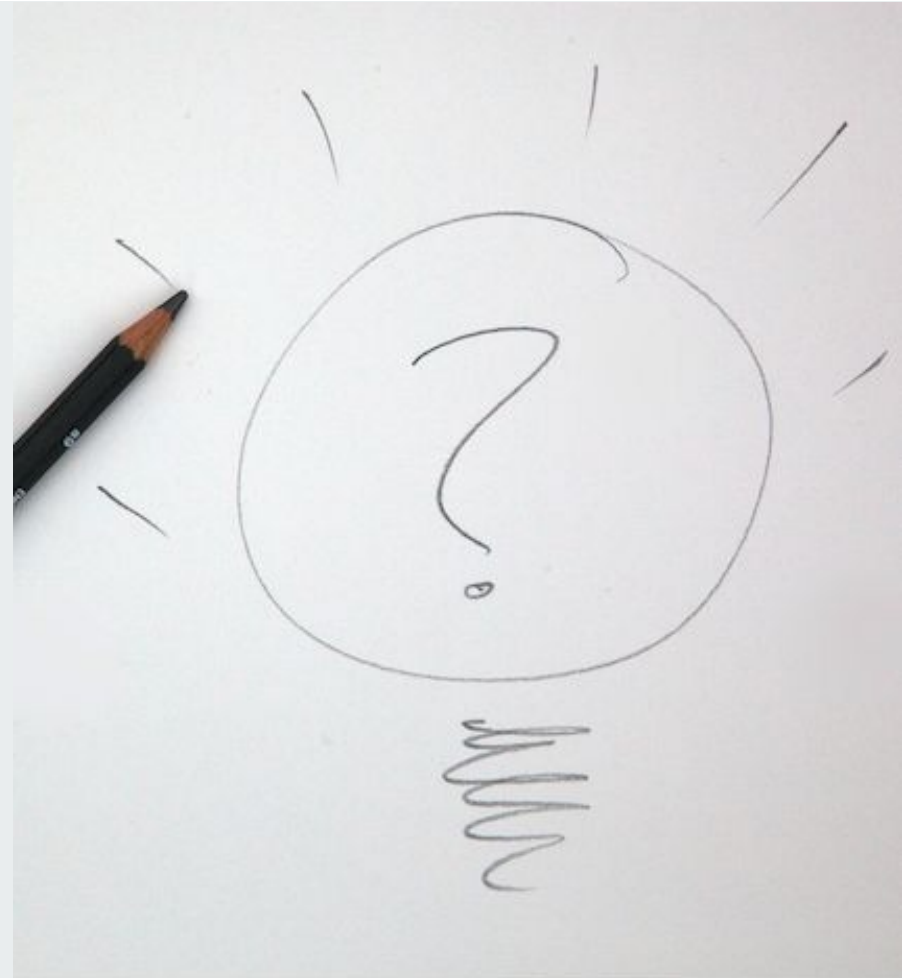




# Campaign research 101

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September 2020





**We live on Aboriginal and Torres Strait Islander land and pay respects to First Nations Elders, past, present and emerging. Sovereignty was never ceded and this is and always will be, Aboriginal and Torres Strait Islander land.**

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# Why do campaign research?

**To win your campaign.** Campaign research gives you the information you need to set winning strategy and deploy resources wisely.

Campaigns that convince people meet them where they are at, appeal to their deeply held values and use language they can relate to.

Campaign research gives you data on the audiences you need to engage to win your campaign. Research helps you understand what they know and think, how they self-identify in relation to your issue and how they relate to the issue itself. Research also gives you data on how target audiences see your issue in relation to other issues they care about. Research findings help you understand the information-needs of your audience.

Use research findings to relate to your audience's needs and resonate with their personal or group interest.

All of us experts and advocates working on social change campaigns care so much about our issues that we develop 'false consensus bias,' in other words, we overestimate the extent to which our audiences think like we do. If you want to talk to people who are not like you, you'll only be effective if you can speak their language. Doing so requires research. Campaign research helps you get the right message, in the right format, delivered by the right messengers, to the right audience through the right channels.

This guide has been developed for social change advocates as an introduction to the basics of campaign research.



# Setting research objectives

The first task of any campaign research project is setting clear research objectives.

Your objectives will be informed by your situation analysis and campaign strategy. Some common research objectives include:

- Define your target audiences (find out who you need to persuade to win).
- Identify levels of issue-awareness among target audiences.
- Explore attitudes, beliefs and values of target audiences.
- Test issues that are important to target audiences, and how they intersect with your issue.
- Find the language your audiences already use to talk about your issue.
- Test barriers to support or opposition messages
- Figure out which facts and stories change people's minds.
- Test your campaign messages.
- Identify target audiences' key information sources.
- Test campaign creative.



# Types of research

Campaign research is either qualitative or quantitative.

Quantitative research (polls, surveys) allow you to test audience attitudes in a statistically reliable way, while qualitative research helps you understand why target audiences hold the attitudes that they do.

Use quantitative research when you want statistical information on what your target audience thinks (e.g., what percentage of people support corporate tax cuts). Use qualitative research to find out **why** they hold they views they do.

## **Quantitative**

Benchmark Polls

Issue polls

Longitudinal surveys

Member surveys

CATI polls (computer assisted telephone interview)

Dial-testing

## **Qualitative**

Deep dive interviews

Face-to-face focus groups

Online focus groups

Online communities



Qualitative research (focus groups) helps you understand what underlies public opinion and behavior. Once you know how your target audience thinks, feels, and behaves—and why—you can better develop messages that are effective in creating the change you want.

If you are starting a significant new campaign budget for both qualitative and quantitative research. However, make sure you hire a research agency with expertise in both methods, as the two research types require very different skills. Poll research requires the skills of a master statistician whereas focus group research requires sociology and political strategy skills.

Campaign research is also either exploratory or confirmatory. Exploratory research is intended to identify new or previously unconsidered strategies. Confirmatory research affirms or validates a predetermined strategy or message.





# How to commission campaign research

If you are responsible for procuring research it's important to understand what you're buying.

For general issues-research approach reputable market research agencies. If you're fighting a particular legislative battle or running an election campaign find an experienced political pollster.

Research the researchers – shop around and find out which research providers are known for delivering what you need. Look at campaigns you think are impressive and contact organisations to find out which researchers they used.

If you are commissioning a significant research project you might also consider hiring an independent research consultant.

This person wouldn't perform the actual research, but will have the knowledge to take charge of hiring a research company and managing the research project.

When you're deciding which research company to go with, look at experience but also a company's reputation and credibility in the field. Going with a well-known research agency is important if you want your research to influence journalists or politicians.

Talk to the consultants on the project team to make sure they have a good grasp of your issues agenda and objectives. Commissioning poorly-performed research is worse than doing no research at all. You risk getting bad data that will lead you to set the wrong strategy.





# Research design

Campaign research has three key stages. The most successful research programs conduct each stage sequentially.

## 1. Issues research

Explore the issues that matter for the audiences you want to engage and persuade. Understand levels of awareness and levels of concern about your issue. Test existing frames. Understand differences in the views of target audience segments.

Use the findings of Stage 1 to draft messages for testing in Stage 2.

## 2. Message research

Develop messaging hypothesis and draft messages to test. Test how target audiences respond to what you want to say.

Use the findings of Stage 2 to develop campaign collateral to test in Stage 3.

## 3. Creative research

Test advertising scripts, campaign materials and video products. Check that your issue and message research findings have been well executed in final campaign collateral.



# Research design tips - Qualitative

- **Get the audience composition right.** Consider whether you need to separate audiences by voter ID, gender, age, education level or income. Group composition affects what people share in a focus group.
- **Keep group size small.** A group of more than eight people gets too unwieldy and makes it hard for the moderator to unlock core findings.
- **Use an experienced moderator.** Good moderators use a raft of techniques to avoid groupthink and draw responses from all participants. Before commissioning research ask your moderator how they manage dominant participants, how they interpret facial expressions and body language, and how they manage group dynamics.

Your moderator should be able to describe the range of elicitation techniques they use to generate results.

- **Edit out leading questions.** Leading questions or bias prompts they will corrupt the research findings. People only speak freely when the moderator is unbiased and neutral. A good moderator will not try to influence the discussion in any way. Ideally, focus group participants should not be able to guess where the moderator stands on the issue.



# Research design tips - Quantitative

- **Get the sample right.** The audiences you poll should reflect your campaign's critical path. If your research objective is to test campaign messages, sample target audiences. If you want to understand levels of awareness or support for your message or the effectiveness of your opposition's message, survey a broader population sample.
- **Sample size is important.** For example, a survey that has 1000 respondents will provide results that are – at the 95% confidence level – subject to a sampling variation of between 2% and 3% at the total response level. Sub-samples will exhibit larger sampling variances.
- **Pick a methodology that delivers your audience sample.** For example, if you are surveying women aged 25 - 40 years , you know they are too busy to take a phone poll, so use a mobile phone survey. Your research agency can provide advice.
- **Make sure your sample is representative and take extra steps to include hard-to-research people.** including those with english as a second language, young people and First Nations people.
- **Avoid voice automated surveys or robopolls.** They don't provide good data. Samples are skewed to whoever answers a landline phone and takes the time to respond to a voice recorded message.



# Research design tips

- **Let the experts draft the poll.** Pollsters pay careful attention to wording, word order, questionnaire length and format, and unintended sources of bias or error. Poll researchers ask clear, non-leading questions that don't assume knowledge on the part of the respondent. Writing poll questions that deliver strong data requires specialist expertise.
- **Consider boosting data from certain audience demographics.** If you need information on a specific sub-population in a survey you may need to 'oversample' that population. This means talking to enough people in that subgroup to make your data reliable.
- **If you want Government action.** Test perception of government performance on your issue and which parties are seen as handling your issue best..
- **Sequence concepts in a poll.** Don't bias your survey questions by mentioning an idea or issue that people will still have in the back of their minds while they answer a later question (priming).
- **Check all questions are Grade 6 reading level or lower.** It's important that respondents interpret each question in exactly the same way.
- **Know how you will use the results.** Consider if you want a media headline from a poll ("*87% of young people think X*") in the research design phase.



# Tips on testing creative

When you've done good issues research and developed strong messages, you need to check that research findings have been translated into the final campaign creative. When testing campaign creative check the following:

**Comprehension:** Do people understand the content the way it's intended? Is the message clear and easily articulated?

**Concept:** Is the story of the ad credible and does it make sense for the target audience?

**Salience:** Do people pay attention to the ad? Is it easy to recognise, remember and repeat? Is it relevant, unique, believable?

**Reacts:** What kinds of feelings and attitudes does the ad provoke? Do audiences find it persuasive or does it repel them.

**Unintended effects:** Did the creative provoke negative responses or resistance because of its look and feel, tone, scripting?

**Call to action:** Does the ad leave your target audiences wanting to act?



# Developing campaign messages to test

Now you have researched where your target audiences sit on your issue, you can develop campaign messages to test. Strong campaign messages build a bridge between where your audience is at now and your campaign win.

Messages that win campaigns define what is important, shift the debate, neutralise opponents' messages and empower supporters. They shape what we perceive to be true.

Messages should be drafted to acknowledge that we work in a contested environment and your message sets up the choice between you and your opponent.

Frame your argument by making clear the campaign is working on behalf of the audience and its interests and against interests that would seek to benefit at the expense of the target audience.

When drafting messages to test in research, be specific. Your campaign messages must specifically name the who, what, why, when and where of your story. Use facts to support your stories. Facts shift public conversations by creating awareness.

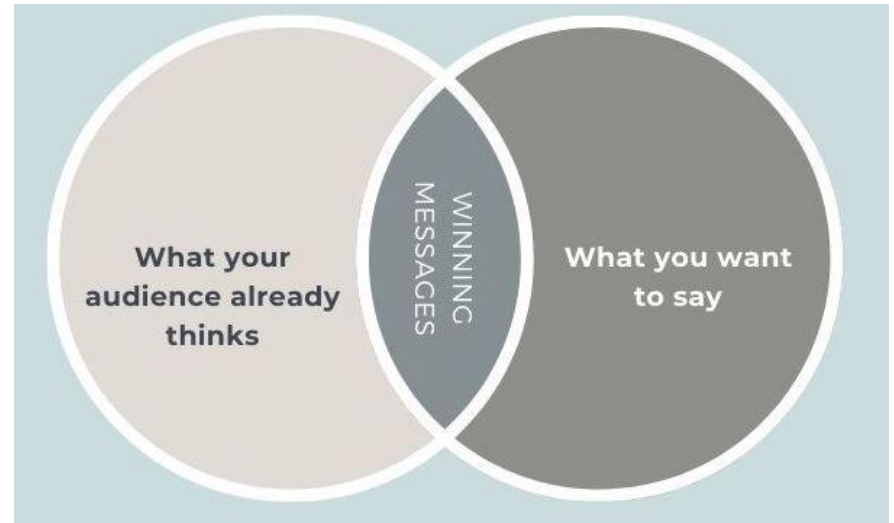
Define the problem, who is affected, how they are affected, and name the solution that you want. If you can name the problem in ways your audience can relate to, you have a mandate to define the solution.



Comprehension comes first. It's more important for a message to be simple, clear and coherent - draw on key facts and prime relatable experiences - than it is for a message to be funny or clever.

'Always lead with values,' is a catch cry of campaign messaging, but consider leading with values held by your target audience. If you always lead with your own values, you will alienate audiences that don't have the same worldview as you.

A good message connects you with your audience - we are 'on your side' - it illuminates the core issue at stake and is consistent with the messenger's brand and role.





# Research on a tight budget

**Campaign organisations often argue that they can't afford research.** The opposite is usually true - you can't afford not to do campaign research.

Every campaign dollar you spend will be better spent if your campaign is informed by research.

If you need to test the views of audiences that your organisation doesn't already engage with, you need a research agency.

However, if you are developing content for audiences you already engage with there are lots of ways to test campaign content on a tight budget.

## **Desk research**

Audit and synthesise existing research findings. Conduct a frame analysis by reviewing and analyse key public comment on your issue.

## **Owned digital channels**

For messages and products that will be targeted at your 'base' (existing supporters and people like them) engage them and ask them their views, then map and code responses.

Post a shout-out to your Facebook audience and ask for participants to join a small Facebook Group where you can share campaign creative with short survey questions.





# Research on a tight budget

- Send short polls to your supporters. Don't just ask them what they think about your efforts - ask them what matters to them right now. You can use fast-turnaround findings to make your campaign communications more relevant.
- Use Facebook or Google digital testing platforms to run a cluster of ads to attract clicks and engagement from your target audiences and analyse data. Both platforms now have sophisticated creative testing programs that make third-party adtech tools pretty much obsolete.
- Intercept surveys are an easy and cheap way to test draft creative executions on a budget.

Set up a stall outside a local shopping mall in the area where your target audience lives. Stop passers by and show them your creative and ask them three targeted questions. The fast turnaround and high-volume of responses makes this method ideal for testing draft executions and allow you to generate semi-qualitative results. Even though you didn't select your sample randomly, you did use close-ended questions and tabulate answers statistically. Ask respondents a couple of demographic questions at the end of your conversation.



# Use research findings to set strategy

Research is only useful if your research findings are actionable. That is, if you use your research findings to set campaign strategy. We started with setting clear research objectives, because when you start with strong objectives, you can use research findings to understand strategic positioning, make strategic choices and put strategy into action.

Reading research accurately and using it to develop actionable strategy is a learned skill. Ask your researchers to help you make sense of what findings mean for your campaign. Focus group findings can be categorised, tagged, themed and coded. Polls numbers can be overlaid and read in conjunction.

When you scope a research project ask your researchers to explain how they will present your findings.

Your research findings should tell you:

- Audience's level of awareness about the issue
- Accuracy of your audience's views about the issue
- Audience attitudes in relation to the issue
- Importance of issue in relation to other issues
- Who are credible messengers?
- Actions the audience is prepared to take.

Research findings tell you what your core communications tasks are, and what order to do them in. Use research findings to set clear goals and objectives and inform tactical execution.



# The evidence you need to win

Our modern attention-economy makes connecting with new audiences more challenging than ever. However, successful social change campaigning requires you to frame your issue-debate in a way that builds public support.

Shifting public opinion, influencing the media environment, changing policy or corporate decisions all require an evidence base.

Remember research findings are only relevant in the context of the particular audience that were investigated at any given time. No findings are universal and no campaign research or messaging advice should be universally applied.

When we adopt research findings from other countries or political contexts we risk reverting to saying what we want to say, rather than what our audience needs to hear.

This guide has covered the basics of campaign research approaches that will help you get to know your audiences.

There are a lot of things to consider when commissioning campaign research, but the main thing is to be open-minded and listen. People-driven campaigning requires you to listen to your audiences so you can meet them where they are at.



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