

CAMPAIGN PLANNING: RESEARCH

Slide 1:

A winning political campaign is one that takes time to target voters, develop a persuasive message and follow through on a reasonable plan to contact those voters directly. But you can't get votes just by chance. Many unexpected twists and turns can happen between now and Election Day. You need to prepare yourself and your team in advance by thorough campaign planning, so you can face challenges and address any situation. Your candidate, the campaign manager and all the key advisers should conduct a strategic planning meeting which should result in a written campaign plan. In reality, if the plan is not written down, there is no strategy at all and the campaign is left to circumstances you cannot influence. The rule is simple - if a plan is not written down, no plan exists. Once you have the written plan, you must follow that plan in a disciplined way. As with any plan, it is only as good as its implementation. All campaigns must be flexible to changing circumstances, but these changes should be carefully considered and weighed against the original research and strategy laid out in the plan. This presentation will guide you through the first step in developing the campaign plan – research.

Slide 2:

First, let's briefly review all the steps in developing your campaign plan. This will help you to understand why research is important. You must make sure to include all the following steps in your plan:

Firstly, conduct the **research** necessary to prepare for the campaign. You need to conduct a realistic assessment of the political landscape in which you will be running. The information you collect will help you to set a **strategic campaign goal** of how many votes are needed to win. What you need to do here is determine what must be done to achieve that victory. This goal must be realistic and take your resources into consideration – volunteers, money and time.

Once you decide how many votes you need to win, you need to determine what makes these voters different from other voters who will not support your candidate. This process is called **targeting the voters** or simply "targeting." The point of targeting is to determine which groups of the voting population are most likely to be responsive to your candidate so that you can focus your campaign efforts on these groups of voters. Targeting is important for two reasons. First, you want to conserve those precious campaign resources of time, money and people, and second, you want to develop a **campaign message** that will best persuade those voters you still need to convince to vote for you.

A campaign message tells the voters why you are running in the election and why they should choose you over your opponents. A campaign message is not the candidate's program of what they will do if elected, it is not a list of the issues the candidate will address, and it is not a simple phrase or slogan. All of these

persuade voters, but they should not be confused with the message, which is a simple statement that will be repeated over and over throughout the campaign to persuade your target voters.

Now you need to decide what technique is the easiest way for you to communicate with this large group of people and convince them to vote for you. For that, you need to develop a **voter contact plan**. There is no point in having a great message if the voters do not know about it. Voters are most likely to be persuaded when they hear the same thing from many different sources. If they hear that you are a good candidate from a respected civic organization, meet the candidate going door to door, see some persuasive campaign literature, and read a favorable article in the newspaper, then they will more likely remember the candidate and vote for that candidate. None of these contacts should be left to chance. A well organized campaign will make sure that all of these contacts happen and that the same message is delivered each time.

Now, you have done the **research, set the goal, targeted the audience, developed the message** and figured out **how you are going to deliver** the message. But, all of this planning needs to be **implemented** on the ground. You need to figure out how much time, money and people all of this will cost. In this final step you will look at the roles of the candidate, campaign manager and other professionals you may have involved in your campaign. You will look at ways to recruit and keep volunteers. You will develop a campaign calendar and discuss scheduling. Finally, you will develop a campaign budget and figure out how the money will be raised.

Slide 3:

While certain basic principles can be applied to each campaign, it is important to have a complete understanding of the particular situation and the conditions in which your campaign will be run. Step one, Research, is where you start and where you take into account the differences and peculiarities of each campaign. The first step in developing a winning strategy must begin with a realistic assessment of the political landscape in which you will be running. It is true that you can never know everything about your district, your opponents and the voters. However, by using your time wisely and setting clear priorities, you will be able to compile the kind of information you need to develop a good strategy and be prepared for most events in the coming campaign. Research determines where you put your **people** or volunteers and how you spend **time & money**. Research hones and drives your campaign **message**. Research builds **confidence** in your strategy. And without research, you're just guessing.

Slide 4:

There are a number of factors that should be understood as completely as possible as you prepare to write a campaign plan:

2. What are the **characteristics of the district**?
3. What are the **characteristics of the voters in the district**?
4. What has happened in **past elections**?
5. What are the **main factors affecting this election**?
6. What are the strengths and weaknesses of **your candidate**?
7. What are the strengths and weaknesses of all the **viable opponents**?

We will expand upon each of these points in more detail in the next slides.

Either alone or as a team, it is important that you set and stick to a time limit for doing the research. There will always be more information you can gather, but this will only delay the use of the information you already have in developing your strategy and the amount of time you have until Election Day is limited. In some cases, this type of research may benefit from more scientific methods of obtaining the data, such as political polling or focus groups. You will need to determine what resources are available to you and whether they are worth the expense of time and/or money. In small local races, paying for a poll could cost as much as the whole campaign and therefore should not be considered. On a larger campaign where a lot of money will be spent on advertising, you spend a fraction of that amount on public opinion research to see if the message of that advertising will work.

Slide 5:

It is important to first determine the type of election in which you will be running, and what the rules of the election will be. Much of the basic strategy depends on this information. Do you need a majority of the votes to win or a plurality? Will there be a runoff election? In Egypt's People's Assembly, one third of members are elected by absolute majority vote through a two-round system and two-thirds of members are elected through a closed-list proportional representation system. These rules are clear but you will still need to determine your strategy based on the number of candidates and their relative expected strength. You should definitely research the laws and, if they are complicated, you may want to ask your political party or a lawyer to draft a memo outlining the most important points. Missing a deadline or violating some part of the law could end your campaign before it has even begun.

These are a set of questions you need to consider when researching electoral rules:

- **Type of Election.** What type of election is this (for example, party list or candidate)? What is required to win the election (for example, a simple plurality or a majority of the votes cast)? How many seats are open in this election race? Will you be running alone or on a list?
- What the **Election Law** stipulates about filing the candidacy, the filing deadlines and what is needed to run as a candidate. What are the rules about campaign finance and are there contribution limits?
- Is the **Election Commission** responsible for running the elections and validating the results? Can you delegate your party or candidate members into local or national election commission? Is there a history of voter

- What is the law regarding access to **media**? How does the law regulate placing posters, organizing events or other methods of visibility?
- What does the law say about **Election Day**? Is there a turnout requirement for the election to be valid? When do the polls open and close? What are the rules about campaigning on Election Day? What are the rules about campaigning near a polling place?

Slide 6:

Once you have determined the basic election rules, you should start to gather as much information on the district and the voters as possible.

- What are the geographical **characteristics of the election district**? How large is the district in which you will be running? Is it rural, urban, flat or mountainous? What type of terrain will you have to cover as you campaign? What type of transportation will you and the voters need to use? How has the population of the district changed recently?
- You need to understand the **political landscape** in which you will be operating. Who are the important political players in the area? How strong are the various political parties in the area? You need to identify the civic and business leaders that can influence the campaign. Winning the support of a particularly influential leader in the community can often make the campaign much easier.
- You also must understand how voters get their information. What are the local **media** outlets? Who are the reporters and what are their deadlines? How will the election be covered and how does the press view the various candidates? To develop a comprehensive press strategy, it is important to have as much information on the media as possible.

Slide 7:

This is an example of media mapping, based on national poll results. This is one of researches done by the NDI Egypt office in 2012. You could do the same at a smaller scale, for just your district, for example. It shows where voters get information, what media they prefer in different regions. Based on this information you can design your voter contact plan. If we look at these results, for example, it might seem that the wise decision would be to use satellite and national television to broadcast your election messages to your voters. However, as discussed before, you need to take in consideration demographic groups of your voters, what media they follow and your financial resources. For example, if your target group is young voters, you should consider using social media and the internet to convey your message and communicate with this group. In Egypt, as elsewhere around the world, you will find that youth are the biggest demographic group to use internet as their main source of information and social networks to communicate. According to research published by the Danish-Egyptian Dialogue Institute in 2012, some 800,000 Egyptians have a Facebook account and it is the third most visited website in Egypt, after Google and Yahoo. That social media is being used for political means is also evident, by the finding that 86% of Egyptians with a Facebook account say they use it for political practice.

You can do this kind of research with your own resources but for a larger campaign it is recommendable to outsource the media mapping to an external professional research agency.

Slide 8:

The table on this slide shows some of the demographic characteristics for different governorates in Egypt. [You can obtain demographic, socio-economic and voting data from many online sources like CAPMAS \(Central Agency for Public Mobilization And Statistics\) the Ahram Center or Information and Decision Support Center.](#) You should try to obtain the most recent data and breakdown your voters into as many demographic subcategories as possible to help you shape your campaign message according to characteristics of a particular group. For instance, seniors will be less interested in schools and more interested in pensions, while young mothers will be more interested in schools and less interested in pensions. By determining how many senior citizens there are and how many young mothers there are in your district, you will be better able to assess whether they should be included as target groups for your campaign and develop messages that matter to these different voter groups.

Slide 9:

You will need to break down the voters in your district into manageable groups. This is the basis you will later use to develop a strategy for targeting particular voters. The following are some of the questions you may want to consider.

- Is there a voter file or accurate **list of all possible voters** available to the campaign?
- What is the **geographic break down** of the voters? What percentage or how many people live in the city, in rural areas or in small villages? Do the voters live in extended-family or single-family homes or apartments?
- What is the **demographic composition** of the voters? For example, what are the income levels, education levels, professions, ethnic backgrounds, religious backgrounds, age, gender, etc. Where do people work, shop and play?
- You also need to **break down voters into groups** of those who support you, those who support your opponents and those voters you hope to persuade.
- **Define your voter base.** Voters with similar characteristics may have similar interests and may tend to vote the same way.

Slide 10:

This map depicts Egypt's population density. You can use census information [from CAPMAS, the Ahram Center or Information and Decision Support Center, for example](#), to create maps of smaller areas. In combination with voter targeting, this can help you to allocate the number of volunteers you need to cover each area.

Often you can gain valuable information about the upcoming election by looking at information from past elections.

- Who ran for this position in your constituency in past elections and what were the results? **Who were successful opposition candidates?** How did candidates with similar backgrounds and messages fare in past elections? Did your opponents run effective or ineffective campaigns in the past?
- Did your **party candidates** run effective campaigns or make mistakes that influenced the level of support received?
- How many voters **turned out** for similar elections in the past? How many votes were needed to win? You may be able to use this type of information to predict the turnout and baseline levels of support in this election.
- What were the **key issues** in your constituency or country and what were the main debates about?

These questions will help you measure the potential for growth over the last election. You will want this type of information later when you determine what worked for previous candidates and what you will have to do differently to do better than they did.

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Now we should look at the factors that will affect the upcoming election, namely the various issues that concern voters and other political campaigns that are being waged in the area.

- What is the overall **political climate** - optimistic/pessimistic? Are voters engaged or apathetic, fearful or hopeful?
- What local, regional or national **issues** are important to voters?
- What will motivate voters to go to the polls? How would you describe the voters' mood?
- What other **candidates** will be on the same ballot? Will candidates in other races help or hurt your campaign? Is there an opportunity to work with other campaigns in a coordinated manner? What effect will other campaigns have on the election? Your relationship with your party and other candidates on the same ticket will affect your strategy. Your campaign's message should complement, or at least not contradict, the other messages of those who you are coordinating with.
- Who are your main political **competitors**? Who is their voter base, and what will they be saying?

Slide 13:

This example shows the issues of importance to voters, with a regional and demographic breakdown. For instance, you will notice that unemployment is the most important issue to women in Alexandria. Detailed information like this can help you to shape your message and target your voters.

Slide 14:

The most important factor in your election will be the **candidate**. During your strategic planning session, you should honestly evaluate the strengths and weaknesses of your candidate. As you do this exercise, you should also look at your candidate from the **point of view of your opponent**. What you may view as a fresh new face with new ideas, your opponent may view as a lack of experience. Are there any negative things in the candidate's past which the campaign should deal with or which an opponent might take advantage of? You may want to organize your assessment into various sections, such as the candidate's childhood, education, work history, immediate family, and past political positions. It is important to look for both **strengths and weaknesses** in all of these areas. By finding weaknesses early, the campaign will be better prepared to deal with them and respond to charges that may come up later in the campaign. Too many candidates have lost because they refused to deal with past mistakes and were caught off guard when their opponents painted the picture of their mistakes in a very unflattering light. Tie your **candidate's successful personal story to the party message**. Does your candidate have a strong network, is s/he good with people, smart on policy? Does the candidate have a record of keeping past promises? Try to recognize a particular voting group that is either happy or unhappy with the candidate. Is there any court or other public record of the candidate? Identify the most important accomplishments. The candidate must be charismatic when meeting people and a good public speaker. One of the most important jobs of your candidates is **fundraising**. What financial resources will the candidate use, the party's or their own. You need to take care that the candidate doesn't spend too much time on fundraising at the expense of campaigning. Identify organizations or political action committees that are likely to donate to the campaign. Find the cheapest way to raise the most money from potential contributors. Create the cash flow for the campaign based on the money input and spending rate.

Slide 15:

Once you have determined your own candidate's strengths and weaknesses, the next logical step is to repeat the process for your opponents. If you are facing several opponents, you should determine which ones are your strongest competitors for the loyalty of voters you hope to attract. Again, you can organize your assessment into various sections and look for both **strengths and weaknesses**. Your opponents will not be forthcoming with information about themselves. You will probably need to do some digging to find reasons for voters to vote against them and for your candidate. Too often candidates and campaigns view opposition research as looking for the one scandal that will finish off their opponent's campaign. This may happen, but more often what you find is patterns of behavior that you can use to persuade voters to either vote against your opponent or for you. You will use this to create a contrast between your candidate's campaign and your opponents' campaign when you develop your message.

The other mistake campaigns often make, is saying that they do not want to wage a negative campaign. Researching your opponent and waging a negative campaign are two entirely different things. By not taking the time and doing the hard work of opposition research, you forfeit the ability **to be prepared for what your opponent will say** and do and to build the contrast between yourself and your opponent. As you gather your opposition research, you must be extremely well organized: list the sources of your documentation, and have a system in place that will allow you to quickly access the information. Being well organized now will save a lot of time and energy later.

Identify viable opponents and then research their background, education, previous jobs and positions. Find out what previous public statements or important votes/decisions the opponents have made. Exploit negative things in the opponents' background, but don't run a negative campaign. Explore what **resources** do the opponents bring to the campaign and how will the opponents fund their campaign. Try to identify other resources and support for the opponent, like civic organizations, important individuals, etc.

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Once you have compiled all the research, [you should](#) create a notebook that will provide the details in an organized fashion and draft a **summary of the information** that will be used as the basis for your strategy and the written campaign plan. [To do this, you can use the questionnaire at the back of the NDI Political Campaign Planning Manual, which is available for download on this website.](#) From there you will **move to next steps** in planning your campaign – set the campaign goal, target voters, develop the campaign message and the voter contact plan. With all of those steps done, you can begin **implementing** your campaign. Look for other NDI presentations on this website explaining each of the next steps in planning your campaign.