



Demystifying the Strategic Research Process

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Why Do Strategic Research?

- To alter public opinion of a politician, group, product or company;
- To run a political or issue campaign
- To launch or strengthen a political party
- To build public support for an issue
- To launch a new policy initiative



Why Is Research So Important?

- It provides a strategic roadmap for what you should do/say (your message), when you should do/say it (your plan) and to whom you should do/say it (your targets).
- It provides accountability. If something isn't working, the poll will show you and provide options for switching tactics.
- It helps you set priorities, make a plan/calendars, enforce discipline and avoid distractions.
- It removes the guesswork from strategic planning.

What Makes Strategic Research Different from Sociological Polling?

Sociological Polling

- Tells you where you stand
- Tells you what people think
- Standardized
- Reactive

Strategic Research

- Tells you how to get to where you want to be.
- Tells you how to influence what people think
- Customized to fit your needs
- Proactive



Thinking About Research? Ask the Following Questions First

- What is our research objective? What is the most important question we want answered?
 - Not all questions can be answered in one project, so narrow your focus and prioritize.
- What will we do differently with this information?
- Why poll now?
- Is there existing data that can inform our decisions?

The Research Toolbox

- Qualitative Research: Focus groups
 - A group of eight voters meeting a precise demographic and attitudinal profile in a professionally moderated, guided discussion that is audio/videotaped and thoroughly analyzed;
- Quantitative Research: Survey Research
 - Baseline surveys
 - Trend/Tracking surveys



Why Do Focus Groups?

- They provide a rich, textured appraisal of the issue and political landscape;
- They uncover myths and misperceptions about an issue or proposal;
- They are good idea generators and often provide concepts that people working close to an issue may not have thought of
- They are testing grounds for new lines of argument ("trial balloons") or particular language to test in the survey;
- They provide a chance to hear voters talk about issues, leaders and the political environment in their own words;
- Focus groups ARE NOT a substitute for survey research because they are not statistically reliable.



Why Do Survey Research?

- To understand the mood of the electorate (overall and by demographic and geographic subgroups) and its issue priorities.
- To uncover attitudes toward public policy proposals (NATO accession), controversies (tariff increases) or officeholders (President, Prime Minister).
- To develop overarching themes or messages and the specific vehicles that best move your message.
- To assess our opponents' most persuasive messages.
- To determine which positive messages do not work and should be off the table, as well as which attacks from opponents should be ignored.
- To provide internal political cover.

The Focus Group Process in Four Easy Steps

Focus Groups:

- Pollster makes recommendations about number and profile of focus groups, taking into consideration client's budget and strategic goals.
- Pollster engages services of local focus group vendor, writes screening questionnaire and moderator's guide in consultation with client.
- Pollster oversees recruitment, organization of groups, hiring of professional local moderator.
- Pollster observes groups with client, analyzes data, presents analytical report and recommendations for next research stage.

The Survey Process in Four Easy Steps

Survey:

- Pollster makes recommendations on sample size for survey, suggest oversamples, taking into consideration client's budget and strategic goals.
- In collaboration with client, pollster develops the questionnaire based on focus group findings, works with client on drafts until all are satisfied.
- Pollster engages services, with input from client, of local data collection firm. Pollster oversees translation and data collection process to ensure integrity of methodology.
- Pollster receives raw data from local data collection firm and processes it into useable formats.

Parameters of Questionnaire and Sample Design

- A scientifically conducted survey will accurately reflect the demographic and geographic make up of the country;
- Decide on a national sample size: $n=1000$ is a good start with oversamples (additional interviews) to boost number of interviews of key regions if necessary. Oversamples will be weighted to accurately reflect demographic and geographic make up of country.
- Decide who will be interviewed. All adults? Only those who are likely to vote?
- The poll should be conducted in respondent's preferred language. Plan ahead for translations.

Deliverables

A pollster should provide:

- Topline data (filled in questionnaire, with results from whole sample)
- Crosstabulations (data book of results broken down by demographics and geographics)
- Full written analysis with strategic recommendations
- Raw, unprocessed data, at client's request
- Presentation of data to interested parties, locally and abroad
- Memos for public distribution, as dictated by clients' strategic plan
- Ongoing consultation on implementation of poll data
- Complete confidentiality

What Is the Pollster's Role?

- Architect of a data-driven strategic plan, with recommendations for message, media, targeting and calendar.
- Outlines the realities of the political situation facing you. This very often means delivering bad news.
- “Keeper of the Message:” Pollster makes sure that the whole team understands the data and everyone’s activities are consistent with research findings.

What to Expect from Your Pollster

- Time and attention. Ask what other demanding, high profile clients the pollster is working with. Will you have the principle's attention or will you deal with an underling?
- Complete confidentiality. Your pollster should be working only for you and for no competing interests. Ask if she or he has a local conflict of interest. A legitimate pollster will NEVER share your data with anyone, including the media, without your written permission.
- Cooperation with other members of the team (PR firms etc).
- Pre-research briefing and information gathering. Pollster should thoroughly familiarize him/herself with the political environment and issue landscape. Pollster should understand client's strategic needs and goals.



What Your Pollster Expects from You

- A clear articulation of the strategic questions to be answered by the research.
- Regular input about ideas to be tested, messages under consideration and potential tactics
- Timely response to questions and resolution of technical issues.
- A point person available who can answer questions, check facts, resolve technical issues and make strategic decisions about research implementation.
- A realistic research budget adequate to meet strategic goals. Timely payment.

How American* Pollsters Are Paid

- They charge per focus group. Costs depend on the number of groups, the difficulty in recruiting participants, travel. Expect to conduct at least four to six groups
- They charge per survey. Survey costs depend on length of survey and number of people interviewed.
- Analysis and strategic recommendations are included in the cost of research.
- Monthly fee for ongoing consultation, negotiated with the client.

* European, British or Russian models may differ