

EMPOWERING LIBERALS TO WIN: ELECTION CAMPAIGN BEST PRACTICES

Report on Seminar for Campaign Professionals in Washington, D.C.: January 30 – February 4, 2022

Introduction

In January 2022, the North America Regional Office of the Friedrich Naumann Foundation (FNF) convened a seminar for election campaign professionals titled “Empowering Liberals to Win: Election Campaign Best Practices.” Leading campaign professionals from political parties across the world came to Washington, D.C. to hear guest speakers discuss campaign trends in the United States and to share best practices. The purpose of this report is to set out what was covered in the seminar and to make best practice recommendations for political partners of the FNF. The full programme of the seminar and list of participants who attended is attached hereto.

The seminar began with a series of presentations from individual participants who outlined the electoral context in their respective countries, setting out innovations and best practices that had been utilised in recent elections. These presentations were then followed by a series of speakers drawn from both sides of the political aisle in the US, covering developments in US election campaigning, messaging, coalition building, digital and social media campaigning, polling, and modelling, low budget campaigning, campaign advertising, and the role of PACs (Political Action Committees) in US political campaigns.

What became evident from the participant presentations and the contributions of the US speakers was that despite the significant advances in campaigning and campaign-related technology of the last decade, the basics of campaigning remain the most fundamental guarantees of success. These can be summarised as follows:

1. An effective, emotive, and compelling message is the foundation of a successful campaign.
2. The delivery of the message needs to be led by a good candidate or leader of a party – someone who is authentic, relatable, and can connect with the target voter market.
3. Good relational communication of the message drives support obtained via persuasion: face-to-face (door-to-door communication) remains the most effective campaigning tool followed by peer-to-peer messaging.
4. A good campaign organisation must be developed to support the delivery of the right message in volume, via relational communications to the target market over time.
5. Speed wins election campaigns. The faster you drive your message and react to attacks, the more effective you will be.

Participant Inputs

Participant inputs covered the political situation and electoral contexts in Austria, Bulgaria, Germany, Guinea, Lebanon, Malaysia, Peru, Spain, Tunisia, Turkey, and Venezuela. While the state of democracy in many of the countries varies from stable to that of military dictatorship, clear trends emerged:

1. Citizens throughout the world are increasingly disillusioned by and apathetic towards politics. The effects of the COVID pandemic, particularly the economic effects thereof, have aggravated these feelings. Democracy as a system is struggling to provide solutions for citizens, both in the developed and developing world. What is notable is how this trend was reinforced by some speakers from the US who cited the fractious state of US democracy, the resilience of which is currently under great strain.

2. Where democracy has been overturned, such as in the case of Guinea and Venezuela, democrats are struggling to restore freedom. In many respects, the fortunes of many citizens enduring dictatorships are being ignored by traditional western powers who are ceding influence in these countries to Russia and China.
3. Fake news and disinformation remain a serious threat throughout the world. Liberal democratic parties need to invest in effective social listening and effective rapid response systems to counter disinformation and ensure the right message reaches the target market.
4. Effective, clear messaging remains the foundation of successful campaigns.

Developments in US Election Campaigning

Many of the seminar's speakers spoke of the fact that successful campaigns in the US have become conversations, empowering two-way listening founded on relationships of trust between peers. Campaigns are now favouring the fostering of relationships over simple list building and are pivoting to face-to-face conversations and peer-to-peer text messaging.

Data is fundamental in US election campaigns. Unlike most jurisdictions throughout the world, US election campaigners have access to detailed voter file records that, at the very basic level, detail the voting history of registered voters, e.g., whether they voted in a Democratic or Republican primary, the 2014 mid-terms and various presidential (general) elections. These voter file records are overlaid by data obtained from social media profiles, 'lookalike' analysis, and polling. Campaigns then build models to develop strategies to deliver bespoke messages to specific voters at different stages of the campaign, reflecting a 'mega trend' towards individual communication. There can be 'persuasion models' aimed at converting potential voters into supporters and 'turnout models' focused purely on ensuring confirmed supporters show up and vote on Election Day.

Speakers in the seminar cited the importance of data and its centrality to US campaigns. However, they warned that an over-reliance on data at the expense of an effective overarching message and an effective candidate would lead to a poor result. Speakers also stressed that organic data was the most valuable data. This is data that is obtained from actual interactions the campaign has with voters either face-to-face or through peer-to-peer methodology.

A consistent theme throughout the seminar was the importance of speed in campaigns to exploit tactical opportunities and respond to events and/or attacks. Several speakers reflected on the gubernatorial campaign in Virginia in 2021 and spoke about the strategic clarity, message discipline, and tight execution of the 'Youngkin for Governor' campaign. In addition to not having a clear or effective message, the losing 'McAuliffe for Governor' campaign was very slow in responding to attacks and issues arising, ceding the narrative to its opponent.

Enabling social pressure to deliver an electoral outcome is also emerging as a burgeoning election tactic in many US campaigns. This again underscores the move towards peer-to-peer communication and is focused on building consensus amongst voters that registering, voting, or voting for a particular candidate is the 'right thing to do' and a measure of whether you belong to a specific community.

Messaging

Messaging remains the most fundamental component of an election campaign. As the Hillary Clinton campaign in the election of 2016 demonstrated, you can have the most well-resourced election campaign, be equipped with all the mechanics you can muster, and be able to deploy all 'cutting-

edge' tactics to reach voters. However, if you do not have a compelling message that resonates with the voters you need to persuade and those you need to inspire to turn out, you will lose.

Good messaging rests on knowing what the critical needs of your target market are. This knowledge can be obtained from sound qualitative and quantitative research. You then need to align your overarching mission and vision with the critical needs of your target voter to reach a message that sets out your value proposition underpinned by a programme of action that reflects your priorities once you attain office.

Effective messaging changes people's opinions and inspires action. And in today's world, a lot of good messaging focuses on answering the question of what is separating citizens from a better life. What are the key obstacles preventing them from being able to live a decent life and provide for their families?

Polling (Qualitative and Quantitative Research)

As indicated above, opinion research enables good messaging. Polling is a 'temperature check', a prediction at a point in time. Opinion research is about finding the messaging that shifts behaviour and inspires action. Accordingly, campaign professionals should focus on having both qualitative and quantitative research as part of their arsenal.

Qualitative research (focus groups, triads, in-depth interviews, social listening) should always be a first step. It provides depth and nuance on mood, issues, parties, candidates, and allows campaign professionals to listen to and hear people in their own words – what language do they use to talk about issues, parties, the election. Good qualitative research will result in a better understanding of what questions to construct for the quantitative research, understanding of language to use in communicating with voters, and refined messaging.

Quantitative research (phone, face-to-face, online, IVR, and text surveys) helps campaign professionals build a path to winning or achieving their campaign objective(s) by developing the right message, developing the right strategy, and sequencing, identifying key voter targets, and simulating the campaign to follow.

Coalition Building

A feature of US election campaigns is building coalitions *ahead* of Election Day with the intent of pulling together organisations to support one candidate for a specific office. In many of the parliamentary systems around the world and those represented by the participants of the seminar, coalitions are understood as the arrangement made by various political parties *after* an election to form a government.

Several lessons can be taken from the US in respect of coalitions forged before elections. They can prove to be very successful in mobilising voters and delivering election messaging. These coalitions centre on pulling together organisations from various sectors such as business, labour, faith, and civil society. They also focus on specific groupings of people or identities such as veterans and the LGBTQIA community.

The key requirement for forging such coalitions requires developing the right message to inspire and persuade such groupings/communities that you are the campaign to support. It also requires a person in the campaign whose responsibility is solely focused on reaching out, building, and sustaining relationships with these organisations.

A lesson to be drawn even for coalitions formed to govern is the focus directed by US campaign professionals on sustaining these coalitions before, during, and after campaigns. It again evokes the relationship-centred approach of campaigning in the US. Too often, campaign and party professionals ease up on communication and relationship efforts once a coalition is formed and active. On the contrary, such relationship efforts should intensify after the coalitions are created.

Digital and Social Media Campaigning

Digital and social media campaigning has become an indispensable tool of campaigning both in the US and worldwide and is also a highly successful method for raising funds, particularly in terms of generating high volumes of relatively low-value donations that are received on an annuity basis. Without a doubt, digital is now the foundation of all modern campaigns. Any effective campaign needs a 'digital spine' that underpins campaign efforts on persuasion, registration, and turnout.

'Digital' is typically regarded as encompassing digital advertising, texting, websites (all of which need to be mobile-enabled today), social media, and email. Notably, texting, email, and social media are most successful when founded on peer-to-peer techniques in line with the overall trend of relational communications focused on individual interactions.

Again, it must be stressed that a comprehensive digital operation is not sufficient in the absence of an effective message(s). However, if you have devised an effective message(s) and have a strong digital operation, you are well placed to reach voters in creative and innovative ways. It is said that there need to be twelve interactions for a voter with a message before they are likely to be convinced or persuaded and digital gives you the scale to achieve this.

Digital communications typically work on a funnel approach starting with techniques such as Facebook advertising, peer-to-peer texting before cultivating a voter with a series of messages, then engaging them in a sustained relationship before conversion to a confirmed supporter or donor. Notably, 96% of donors end up voting. Donors are also more likely to volunteer ahead of and on Election Day and recruit more voters and donors.

Creativity and innovation are key for successful digital campaigning. What is essential though is that digital campaigning progress from mere digital engagement to digital organising which, founded on relationships, grows the pool of those who support a cause through enabling activism at scale, powered by technology, and focused on developing activist agency and leadership.

Video Advertising

Video advertising is another core element of US campaigning, but no longer just limited to the medium of television. Videos of varying lengths are produced for digital dissemination via social media and instant messaging platforms. Video advertising also increasingly focuses on YouTube pre-rolls and connected TVs (known as CTV advertising).

The standard length of a video advert in the US is thirty seconds, although presidential campaigns do utilise sixty-second adverts (due to their increased resources). Fifteen-second adverts have also been used by campaigns with limited resources. These often by necessity result in highly creative, innovative adverts that make an impact. What is essential in all lengths is that you connect with your target audience in the first six seconds of the advert. In fact, some digital adverts are purely six seconds.

Regardless of the length and mode of the video advert, speakers again stressed the importance of message: deciding what you are going to say is key before deciding how you are going to say it. In the

context of advertising, storytelling that builds a narrative for viewers is essential. Most effective adverts have a clear structure that identifies:

1. The hero – the candidate or party that the advert is made for.
2. The villain – usually the opposing candidate or party.
3. The victim – typically the voter that is suffering (e.g., unemployment, bad education, corruption)

In this narrative, there is a clear threat that reflects what the villain may do or intensify for the victim and then sets out the resolution that reflects that voting for the hero will ‘rescue or save the victim’.

Political Action Committees (PACs)

Political Action Committees (PACs) are unique to the US political scene and are a function of the amount of money that is spent on both campaigns. PACs are organisations established outside of formal House, Senate, or Presidential campaigns to support a specific campaign or target the opponent of a specific campaign. Examples include the ‘Lincoln Project’ (set up to defeat Donald Trump in the 2020 Presidential campaign) and ‘Swiftboat Veterans for Truth’ (set up to support George W. Bush in 2004 and target his opponent, John Kerry).

Unlike the specific candidate campaigns where donations are capped at a specific amount, PACs can receive unlimited donations, and certain PACs registered with the IRS and not the Federal Election Commission do not have to disclose who their donors are. This results in PACs having rather significant budgets, which they predominantly pour into television and digital advertising.

One rule governing the existence of PACs in the US political space is that PACs cannot coordinate with the campaigns they are supporting. This means that campaigns and PACs cannot share opinion research insights, strategy memos, and tactical planning. Campaigns therefore ‘signal’ to PACs what the messaging imperative for a particular period is, often by releasing an extensive ‘statement’ which sets out the messaging to be used for a particular round of advertisements.

It is unlikely that PACs would work in jurisdictions outside the US, as many electoral laws would probably curtail their effectiveness. However, PACs are effective at driving messaging in volume and can be advantageous, and there may be a space for similar initiatives around the world.

Low Budget Campaigning

Throughout the seminar, participants were reminded of the often-excessive amount of money that is spent on US election campaigns and cycles. The Biden campaign raised more than \$1 billion in Election 2020, over \$200 million was spent on the 2020 US Senate race in Maine, and former President Trump has already raised \$140 million to support Republican campaigns in the upcoming mid-terms this November.

These kinds of amounts are simply unattainable in most election campaigns and cycles outside the US. Accordingly, it was important for the seminar and its participants to focus on some of the principles of low-budget campaigning, using powerful US strategies and tactics as inspiration for creative thinking.

Again, it must be stressed that the success of any campaign must be founded on a good candidate and an effective message that speaks to the critical needs of target voters. Building on this foundation, it is important to consider the following:

1. Opinion research and polling via outside consultants can be expensive and prohibitive for many parties. However, parties and campaigns can build in-house operations. Most parties

and campaigns can run their own focus groups and with the right direction, conduct their own quantitative surveys.

2. Organic data is the best data. Political parties and campaigns can build their own data files by recruiting a core of volunteers and getting out into the streets to conduct a comprehensive canvass (census) of registered voters. From this comprehensive canvass, not only will the campaign have obtained invaluable data, but it will also be able to identify and segment the voters to target for persuasion and turn out using organic relational communication methods.
3. Creativity and innovation are often the best way of navigating financial constraints. Invest time and thinking in setting up set-piece events that capture the imagination or drive free media stories. Examples include projecting one's party colours or logo onto notable city landmarks, developing viral digital adverts, and ensuring that you are embedded with party materials at all significant events.
4. Ten genuine volunteers vested in the mission and believing in the vision of the candidate/party are far better than one hundred paid canvassers. Invest in recruiting volunteers and ensure they are recognised, acknowledged, and involved in key strategic and tactical decisions.

Conclusion & Recommendations

Like its predecessor events arranged by the FNF North America regional office, this year's seminar proved to be invaluable for participants and generated some important insights and learnings that will be applied throughout the world. In addition to the learning from the US-based speakers, the interaction between participants – both formal and informal – generated incredible sharing of best practices and the building of an important network that can only strengthen the liberal cause around the world.

The key conclusions and recommendations of the seminar are as follows:

1. The foundation of any successful election campaign is an effective message that resonates with the emotions of target voters. Campaign professionals must prioritise the development of their message before anything else, including the mechanics of the campaign. Ideally, messaging should be informed by opinion research which can be done in-house with the right direction.
2. The other key building block for a successful election campaign is an authentic candidate that embodies the message, can communicate it, and is prepared to work hard in delivering the message repeatedly via a variety of platforms and tools.
3. Relational communication focused on individuals is the best way of disseminating your campaign message. The gold standard is face-to-face, door-to-door communication. However, relational communication via peer-to-peer texting and digital organising is equally effective. The more interactions with voters that are relational and individual, the better. To cement your message, one should aim for twelve interactions.
4. Organic data is the best data. Campaigns should prioritise obtaining data through relational communications whether that be face-to-face or digital. Voter files can be built via overlaying polling information on organic data.
5. Speed is key in winning election campaigns. The faster a campaign exploits an opportunity or responds to an attack (especially those spread through fake news and disinformation), the better. Such speed is founded on the building of an effective campaign machine coordinated by well-established 'war room' practices.
6. Money should not be an obstacle in designing and executing winning election campaigns. Getting the basics right does not cost a lot.

7. Democracy is in a perilous state worldwide, including in the US. To protect it, liberal democrats need to go back to the basics of effective campaigning. Liberals need to focus on developing their message and invest in relational communications that build a movement focused on protecting and sustaining liberal democracy.

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