

TOP 5 REASONS FOR USING RESEARCH IN BALLOT MEASURE CAMPAIGNS®

✓ REASON#1: “DECIDE IF YOU SHOULD GO ON THE BALLOT”.

Ballot measure campaigns are hard work, and often more complicated than running candidate campaigns. You believe that your issue is a good one, but if you do not have a way to get the electorate to support your issue (or to oppose someone else’s issue), you will be wasting a lot of time, money, and energy on a losing proposition!! Using research can help you decide if there is a way to frame the debate, provide a message that is compelling, and pursue a strategy that will win the election. Polling and focus group research help determine if there is a way to do this successfully--and it helps you make those decisions before you make the investment in running the campaign. Just because an issue is interesting to you, or to a small group of people in your community, does not necessarily mean you will win. If there is strong opposition to your issue, you must know in advance whether or not you have a good chance with the voters.

In one example, following state budget cuts, a public employee labor union with whom we were working sought to restore full health care coverage for its members through the initiative process. Polling and focus group research not only showed little support for a potential measure, it also showed that voters felt the benefit of 100% of premiums paid by the state was excessive and that public employees should be expected to pay a portion of the premiums, as is common in the private sector. In fact, a ballot measure would have called attention to the fact that state employees still received health benefits far better than those provided by most private employers, and could have generated a backlash. The union sought other means to restore its benefits.

✓ REASON#2: “DECIDE HOW TO GO ON THE BALLOT”.

Many campaigns make the critical mistake of bringing in the pollsters after the ballot language and arguments have already been drafted and sent for certification. This is not the best way to utilize research. Perhaps the wording of the measure meets legal requirements, or is straightforward, but it may not be the most compelling vocabulary or politically strategic way to describe your issue. Even more common, the vocabulary your committee or lawyers have drafted is perhaps confusing to voters. If you are “stuck” with wording, title, arguments, and a summary that are not the most persuasive message for the campaign, then you must spend considerable resources “re-educating” voters about the ballot measure, and you run the very real risk that voter confusion will simply lead voters to “vote the wrong way.”

Ballot measure campaigns utilize focus group and survey research (polling). Focus groups are qualitative research that tells you how voters approach an issue and what vocabulary they use, or which tests potential messages for print and electronic communications. Polling is quantitative research that tells you where to target your energy, how to frame the issue, what are the most effective messages and how to counter the opposition's attacks. Focus groups and polling work in a complementary fashion--and one type of research is never a substitute for the other. Determine the right vocabulary, and the right message **from the very first stage of the campaign--not after it is too late to modify the ballot measure itself.**

One of the most common errors in revenue enhancement ballot measures such as increased taxes or bonds for schools or public facilities is that they are put on the ballot based on the need (for school repairs or construction, for example) rather than based on the willingness or ability of the voters to pay. We have often used research to identify the "tax-point" beyond which voters are unwilling to pay for valued improvements, such as school repairs. Our research also showed that including specific features in the ballot such as indicating that there would be audits and a citizens' advisory to oversee spending decisions, the tax would expire and could not be renewed without another vote of the people, or guaranteeing that no expenditures would be on overhead, significantly improved the chances of a measure passing. As another example, our research has also shown that in animal protection measures to outlaw cruel and inhumane methods of hunting, it has been important to include certain exemptions and exceptions for the protection of people or property or to remove language that might be unfamiliar to voters ("spring bear hunt") and replace it with more commonly understood and evocative language ("when mother bears are nursing their cubs").

✓ **REASON#3: "DECIDE WHEN TO GO ON THE BALLOT".**

As anyone involved in politics is keenly aware, not all voters are alike. Determining the timing for when to go on the ballot is an important element of your campaign planning, which is guided by polling. What else will be on the ballot in particular elections? Will turnout affect the voters who are more supportive of our issue? Will the top-of-the-ticket candidates motivate exactly the voters who are least supportive of our issue? What are the implications in terms of turn out, financing, or visibility of the campaign of pursuing a measure in a special, an off-year, or a Presidential year election? Will the role of GOTV efforts by other campaigns help or hurt us? We need to know what other ballot measures are being considered, which are definitely on various ballots, and what the impact will be on our issue if other measures are on the ballot. Sometimes, if there

are too many, voters will simply become fatigued, and not vote for those “down the list” or they may “just say no.”

Pollsters examine the types of voters very closely, and can make determinations about when the best time to go on the ballot might be. When we have looked at likely levels of support for projected turnouts for special, off-year or regular elections, our polling has shown that those who are **most** supportive of bond measures for schools, infrastructure, or other finance measures, for example, are the **least likely** to turn out to vote in low-turnout elections. As a result, we have made the appropriate recommendations for ballot timing to enhance our prospects.

✓ **REASON#4: “DECIDE WHICH VOTERS TO TARGET”.**

Realistically, you will not be able to get all voters to support your issue (or oppose an issue if you are trying to defeat a measure). You need to know who your opponents are (so you can decide if you need to invest resources in them), to know who your solid supporters are (so you can focus on GOTV, rather than persuasion efforts possibly), and to know where you can make inroads with “persuadable” voters.

Too many people mistake the role of polling as about the trial heat question. “If the election were held today, would you vote “yes” or “no” on Measure X?” We can wait until election day to find this out. The real strategic purposes of a poll are to find the winning arguments for the measure, its strengths and weaknesses, the strengths and potential vulnerabilities of an anti-measure campaign, to test message carriers, and to identify targets.

Determining which themes, messages, and arguments will work for those who can be persuaded to support the measure (and the most effective way to respond to attacks) is what polling provides, and provides a blueprint for communicating with persuadable voters who may be the key to the success of the campaign.

On gay rights measures we have found it is possible to build unusual coalitions of voters responding to different messages, with libertarians (“government off our backs”) who otherwise hold what many would consider to be “conservative” values joining with business Republicans (“if most of the Fortune 100 companies provide domestic partner benefits, so should our city”) and social progressives (“equality, fairness and basic rights”) to promote non-discrimination human rights and domestic partner measures. These targeted appeals all flow directly from the research.

**REASON#5:
"STRATEGIC DECISIONS SHOULD BE RESEARCH DRIVEN.
YOU CAN'T AFFORD NOT TO POLL".**

Deciding which message to use, which voters to target, which media markets to buy, and when to put the measure on the ballot is not the time to use your intuition. Making decisions based on an organized, coherent, and focused strategic plan will help maximize limited resources by avoiding sending out the wrong message to the wrong people.

Most ballot measure campaigns budget about 5% to 10% of the overall campaign budget for research. The costs of a research program are based on the size and length of the questionnaire and the number of people interviewed (sample size). A typical benchmark poll contains about 50 to 75 response items, and usually takes about 15-25 minutes to complete. For a high-quality, professional public opinion survey, you can expect to pay anywhere from \$15,000 to \$20,000 for a sample size of 400. Shorter, follow-up polls, taken midway through your campaign, are less expensive. Overnight tracking polls taken for fine-tuning the voter contact program near the conclusion of your campaign, cost even less. Focus groups typically cost about \$4,000 to \$7,000 per group.

The pollster, as a member of your strategy team, should be the keeper of the message and the traffic coordinator for targeting the voters. The pollster should play an ongoing role throughout the campaign cycle to make sure the message is on track and on target at all times. All voter communication should convey a consistent message, so the pollster should be available to review your speeches, direct mail, television and radio advertisements and other campaign messages. Often with ballot measures, you have two constituencies to worry about--the "coalition" or ballot committee (which needs to be managed and controlled so that the message is consistent), and the electorate, which needs to be persuaded. The pollster often can help "keep everyone's eyes on the prize" when the campaign's message begins to stray off course.