



**TITLE OF CASE STUDY: Obama for America**

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**Business Situation and Campaign Objectives**

Although our singular objective was clear - re-elect President Obama - our path to that victory was anything but. From the outset, we faced serious headwinds. The economy was still suffering from the worst financial crisis in a generation. The Citizens United decision had unleashed corporate and special interest money and realistic estimates (which ended up being accurate) projected that opponents of the President would spend over \$500 million on negative advertising to deny him re-election. We'd lost ground with key segments of swing voters who helped create the 2008 Obama majority coalition because they had been turned off by the political stalemates on Capitol Hill. Moreover, voters generally had become deeply disillusioned with the bitter partisanship in Congress and this spilled over into their views of the President.

And, we faced an opponent whose background gave him a claim to economic expertise. Given the financial and resource constraints, the campaign's research and messaging was targeted only to those 14 states that were considered to be "Battleground states". Within that, we were aware that only a small slice of the electorate was truly persuadable. In an environment with historic levels of ad spending and voter contact, we needed to find crisp and pointed messages that resonated with voters, helping them recognize that President Obama understood their lives and struggles and was fighting for their interests. This demanded an acute and insightful understanding of underlying voter attitudes and beliefs that could inform our communications strategy and framing of the key issues and choices before voters.

Based on our ongoing research – both qualitative and quantitative – we had several imperatives in framing the President's message and bolstering the overall narrative of the campaign.

1. Ensure the debate over the economy was rooted in a positive, forward looking vision for a stronger, more durable economy built on the President's core values:
  - a. That the key to economic growth and durability is a thriving middle class.
  - b. That everyone, from Wall Street to Main Street, should play by the same rules, where everyone gets a fair shot and pays their fair share.
  - c. That responsibility and hard work should be rewarded.
2. Demonstrate that the President's plan for the economy was to grow it from the middle out, not the top down.
  - a. Long term security for the middle class requires investing in manufacturing, small business and education to create the jobs we need and train our children and workers to succeed in the global economy.
3. Personalize the contrast with our opponent in a way that drew on the reservoir of good will toward the President and the positive views of his character.
  - a. On a fundamental level, through his own background and experiences, the President understood the concerns and struggles of working and middle class families.

- b. Being on their side and fighting for an economy that treated them more fairly had always been his guiding lights, and the economic circumstances made this ever more central to the debate.
4. Emphasize that cutting government spending alone is not an economic plan, because we can't just cut our way to prosperity.
5. Underscore that our opponent was offering the same trickle down policies and theories that had helped people at the top, but had contributed to voters' existing sense that the middle class had long been in decline.

In pursuing these objectives, we constructed the defining narrative of the campaign: this was a referendum on which candidate could be trusted to restore economic security to the middle class. We aimed to present voters with a clear choice between two competing sets of economic values: one rooted in fairness that put the middle class first versus another that had been tried and failed and only exacerbated the struggles of ordinary Americans.

### **Research Story**

Although we had been conducting regular research for the White House, on behalf of the Democratic National Committee, for several years, our 2012 effort kicked off in mid-2011 with two innovative research pieces: an ethnographic study and a benchmarking poll.

#### **The Ethnography Project: Illuminating the Values and Attitudes of Voters.**

This project had two phases:

1. Online diaries: More than 100 participants who we had identified as middle-class, suburban, Independent voters completed diary entries twice a week for three weeks. Each diary entry consisted of approximately 10 questions which were different for each entry. Respondents took approximately an hour to complete each diary entry, and by the end, we had more than 1400 pages of diaries.
2. In-person triads: In three key strategic locations – Denver, Columbus and Orlando – we conducted 3 focus groups comprising of 3 of the most compelling diarists, who spoke with us for 2.5 hours.

This project helped us develop numerous critical insights into the mindset of the American voter as we entered election season. The project revealed that the financial crisis and the ongoing instability it prompted had three distinct but entwined impacts on middle class America:

- ✓ Economic – deep aversion to risk and debt and skepticism that the American dream was still relevant and achievable.
- ✓ Psychological – stress, anxiety and a pressing desire for financial security and economic stability.
- ✓ Value-shaping – a desire for a return to an America based on reciprocity, where hard work is rewarded and greed is penalized and communities pull together to support each other.

Understanding this mentality aided us in identifying which of the President's core values would resonate most strongly across the country and build the most compelling case for the President's middle class-based agenda. We wanted to be sure that the President's vision accurately addressed the elements of middle class life that voters felt had been eroded, including:

1. Restoring the basic bargain of American life: if you work hard, pay your taxes and act responsibly, you'll get ahead.
2. Ensuring that the financial stability and security of the middle class, including into the retirement years, remains the cornerstone of America's economic strength.

3. Regaining the promise of opportunity for all Americans, meaning that everyone who is willing to work hard can get access to the education and training they need to give them a fair shot at middle class life.
4. Making sure everyone pays their fair share by reorienting the tax system around principles of fairness and balance, and ensuring working and middle class Americans don't shoulder the burden of deficit reduction while corporations and the very wealthy thrive.

### *The Benchmark Study: Navigating a Path for the President's Message*

In July 2011, on the heels of the ethnographic study, we conducted a large quantitative study in Battleground states with the aim of refining the President's message within the context of the voter mindset we had uncovered. This helped us sharpen the choice of economic values before voters and position our message as positive and forward-looking. To strengthen this contrast, the Benchmark helped us recognize strategic priorities including:

- ✓ *Controlling the context:* Voters acknowledged that the recession and record debt didn't happen overnight and they knew remedies wouldn't take root overnight. As a result, voters never fully blamed the President for the state of the economy.
- ✓ *Burnishing the President's credentials champion of the middle class:* Middle class security was viewed as the bedrock of long-term economic success.
- ✓ *Demonstrating tangible results that align with our economic values:* This included touting the success of the auto rescue, student loan reform, preventing predatory lenders and abuses by credit card companies and guaranteeing equal pay for women.
- ✓ *Highlighting how the President's vision was in direct alignment with the values of ordinary Americans:* Voters wanted investments that would build a stronger future.
- ✓ *Competitive positioning:* Exposing our opponent's willingness to side with big corporations and special interests at the expense of middle class voters, casting into relief the ways in which he was simply out of touch with the lives of ordinary Americans.

The Benchmark study drove home how critical it was for voters see how the President was fighting for the middle class. With this in mind, the key metric to assess our progress was not simple economic approval, but approval on making the economy fairer for working and middle class families.

### *Ongoing Research: Refining the Middle Class Message*

We continually built on the insights we gleaned from these initial research pieces, ultimately creating a comprehensive, multi-dimensional portrait of voter attitudes and beliefs that we could leverage in both paid and earned media. Polling and focus group research was conducted continuously through 2012, both in the Battleground as a whole and in individual states. In addition, we had a regular online qualitative research instrument designed to understand how attacks on the President were understood by swing voters and their impact in order to determine how best to respond.

Our ongoing research helped keep us focused on the fact that the President's agenda was forward-looking and future-oriented, and not get bogged down in fights over the past. Moreover, it helped us recognize the centrality of the character dimensions of this election, reminding us that in many ways, our biggest political asset was the continued trust voters had in the President to, time and again, put what was right and what mattered to ordinary Americans ahead of politics.

As the campaign progressed, we continued to hone our core insights:

1. Voters always had a layered view of the economic crisis. Voters acknowledged (by a 2-to-1 margin) that the economic problems the President inherited were too severe for anyone to fix

in a single term. This meant that attacks on the President as an economic failure simply didn't comport with voters' sentiments.

- ✓ Because of the scope of the economic crisis, voters' negative assessments of the economy didn't necessarily mean they blamed the President – he consistently won the votes of those who characterized economic conditions as “only fair.”
2. Voters were focused on the future, which made the iconic question – “Are you better off not than you were 4 years ago?” - irrelevant, and so we resisted the bait.
    - ✓ Voters told us that they were not better off than they were 4 years ago. But, when asked what was most important to their vote, 79% said “the candidate who would make them better off 4 years from now,” while only 10% said “whether you are better off then you were 4 years ago.”
  3. Technical expertise on the economy mattered far less to voters than who they trusted to fight for them and create a fairer economy. Trust, in this sense, was as much an economic attribute as a character one.
    - ✓ Governor Romney consistently performed better on the attribute “understands how to get the economy moving and create jobs.” On November 1st, just days before the election, he had a 6-point lead over the President.
    - ✓ But the President had 9-point leads on who would “fight for people like you” and on who would “work to build an economy that is fairer for working and middle class people”, and also an 8-point lead on “is someone I trust”.

### **Campaign Execution**

From the moment then-Senator Obama launched his bid for the presidency in February 2007, the campaign began to amass an enormous database of digital interactions, door-to-door interactions and telephone interactions with voters. The volume of contacts over time was in the hundreds of millions. During that time, the campaign also built a sophisticated analytical apparatus to process that data into two simple probability scores: the likelihood voters would support Obama and the likelihood they would cast a ballot. Every scrap of data was brought to bear on models predicting these two simple characteristics. And as an analysis of the actual election results showed, the scores were highly accurate.

Armed with a precise set of electoral targets and a determination to prioritize persuasive contact with these voters above all others, the Obama campaign designed its paid communications accordingly. Through use of set top box data, the campaign optimized television buys based on the cost of programming and the number of target voters watching those programs. Competitive analysis of television buys during the campaign often noted that while Obama was being outspent by multiples of five or six on traditional campaign ad placements like the evening news and adjacent programming, the campaign was holding its own or ahead in prime time, and was far outspending the opposition along the cable dial. This was a result of program selection that prioritized programs with highest density of persuadable voters at the lowest cost.

In addition, the intense targeting informed integrated communications approaches. Priority voters who had lower television viewing rates were targeted for more intense spending through mailings, internet ads and field contact.

The first chapter in our television advertising campaign was a 60 second spot called “Go” (<http://www.youtube.com/watch?v=F0OVngTHkNg>) which began airing on May 7<sup>th</sup>. This opening salvo distilled the themes we'd identified in our research into a positive narrative establishing the tone and laying the groundwork for the rest of the ad strategy.

The spot opened by flashing back to the 2008, and used new outlets and trusted voices (such as NBC's Brian Williams) to remind voters of the economic catastrophe that had taken place even before

the President took office, thus helping us control the context. From there, we launched immediately into a positive demonstration of the President's character, spotlighting him as a fighter for average Americans (rally footage of the President emphatically stating "don't bet against the American worker" and a VO emphasizing his belief in American values). This segued to showing the President's values in action, highlighting accomplishments such as the rescue of the auto industry. The spot closed with a positive vision for the future which coupled an explicit reference to our middle class focused agenda with an expression of the President's core character (VO: "America's greatness comes from a strong middle class. Because you don't quit and neither does he.")

This spot provided an ideal launch pad for dozens of creative concepts, catalyzing ideas into ads that we ran until Election Day – we never went dark after "Go". Through our rigorous use of focus groups, traditional polling and online ad testing forums, we continually dissected and refined our message to ensure our communications consistently allied both with the President's core beliefs and the experiences and lives of everyday Americans and their families. We were able to strongly position the President as the only candidate who deeply understood the struggles of working and middle class families and remained in touch with their lives. And research drove a targeting strategy that overcame an unprecedented advertising onslaught from both our opponent and outside groups.

### **Results**

President Obama was re-elected, becoming the first presidential candidate since Eisenhower to top 51% of the vote twice. And the President won 12 of our 14 Battleground states.

Despite concerns that the President's base voters would be discouraged and not turn out, our targeting efforts helped drive increases in youth, women, Hispanics, and African-Americans as a share of the total electorate.

Moreover, while late-deciding voters traditionally break against an incumbent, those voters who decided in October or November--that is, those who were persuadable to messaging--broke narrowly for the President, cementing the victory.