
Discovering Campaign Themes: Reinforcement With Q Method

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Campaigners must determine what qualities a candidate should emphasize in his campaign. Although numerous strategic principles could be applied to this problem, campaigners should always apply the principle of *reinforcement*: *Candidates must emphasize those qualities that are consistent with the beliefs and values of potential voters.*¹

This principle is derived from the principles of popularity and credibility. The principle of *popularity* requires candidates to emphasize those qualities that are consistent with what potential voters desire in their public officials. Any strategy that ignores this principle is doomed to failure. Any strategy based solely on this principle will usually cause serious questions to be raised about a candidate's leadership ability. Therefore, campaigners must also apply the principle of *credibility*: A candidate should emphasize those qualities that are consistent with what potential voters already believe about him.

It is axiomatic that candidates must take popular stands on public issues, but they must not take positions without considering the effect such actions have on their credibility. When a candidate takes stands that voters do not normally associate with him, his credibility is jeopardized. When he takes stands that are unpopular although credible, his support is jeopardized. Campaigners must therefore discover what desirable qualities potential voters perceive in a candidate and then incorporate those qualities into his campaign strategy. The purpose of this article is to demonstrate how "Q methodology" can help campaign strategists discover what beliefs and values a candidate should reinforce.

Principles and Procedures of Q Methodology

Well-financed campaigns will usually determine which messages to emphasize with objective data gathered in large-sample surveys. The data generated by these surveys typically include a relatively narrow range of voters' beliefs and values. In preparing a survey questionnaire, the strategist must operationally define all the variables he considers to be relevant to the campaign. The survey questionnaire then is given to a relatively large subject sample randomly selected to ensure that sample results will be representative of a population of potential voters. Finally,

the results must be statistically analyzed to determine which strategic hypotheses have been supported by the data. In short, by asking a relatively large sample of persons, selected randomly, relatively few questions — defined objectively, deductively, and operationally — the strategist can determine which messages to emphasize in the campaign.

Not-so-well-financed campaigns can determine which messages to emphasize with Q methodology (Brown, 1980; Stephenson, 1953).² In Q, strategic hypotheses are generated with *subjective* data gathered in *small-sample*, experimental studies. The data generated by Q studies typically include a relatively wide range of voters' beliefs and values. In preparing a Q study, the strategist must construct a relatively large statement sample (a *Q sample*) that is theoretically representative of a population of potential campaign messages. The Q sample then is given to a relatively small subject sample (a *P set*) theoretically selected to represent variables considered to be relevant to the campaign. By rank-ordering the statements, subjects define their beliefs and values operantly. Finally, the results must be statistically analyzed to determine what strategic hypotheses have emerged from the data. In short, by asking a relatively small sample of persons, selected theoretically, relatively many questions — defined subjectively, inductively, and operantly — the strategist lets his subjects determine which messages to emphasize.

Developing a Q Sample

Developing the Q sample is normally the first task in any Q study. A Q sample is simply a *set of statements* or other stimuli *designed to represent the various dimensions of the subject under investigation*. To effect the principle of reinforcement, strategists must first anticipate the dimensions potential voters may use to make their decisions. Statements that represent these dimensions should then be generated for the Q sample.³

Candidate images and political issues are the two dimensions strategists should normally include in their Q samples. Strategists may then determine whether images or issues are more salient; they also may determine which aspects of these dimensions are most popular and most

credible.

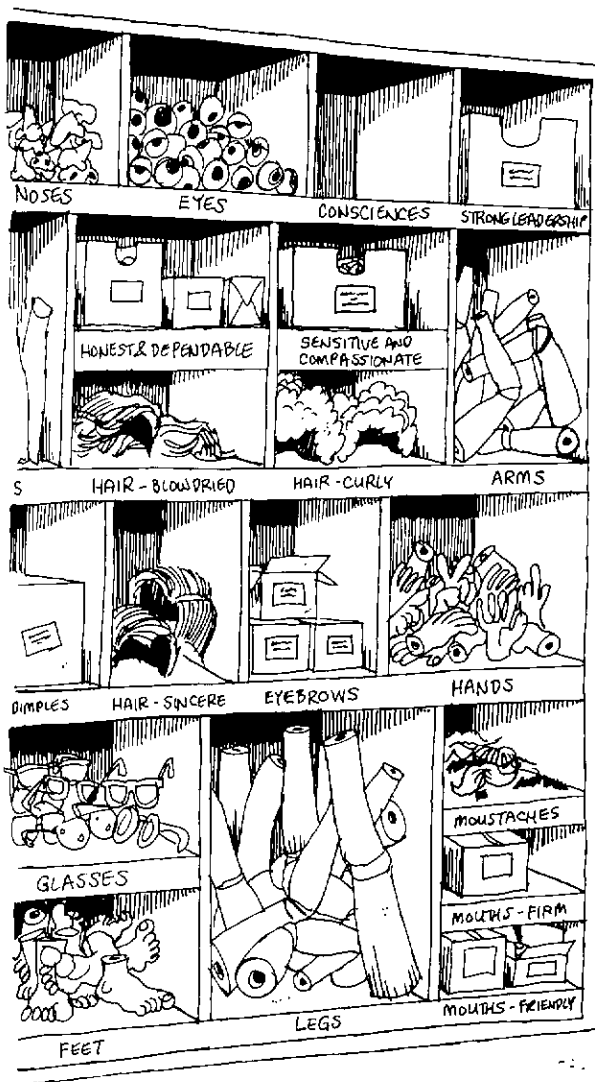
Q samples may be structured or unstructured.⁴ In a structured design, statements are selected to represent a theory or an hypothesis.⁵ In an unstructured design, statements are selected "without any specific regard to any basic dimensions or variables that may underlie them" (Nimmo & Savage, 1976, p. 216).

Structured samples offer definite advantages. A structured sample obviously provides a guide to selecting statements. But more importantly, a structured sample provides strategists an opportunity to test specific campaign strategies. If, however, the objective is to discover a strategy, unstructured samples may be as useful because what really matters — in the end — is what beliefs and values subjects construct with the statements, not what a priori dimensions directed the construction of statements.

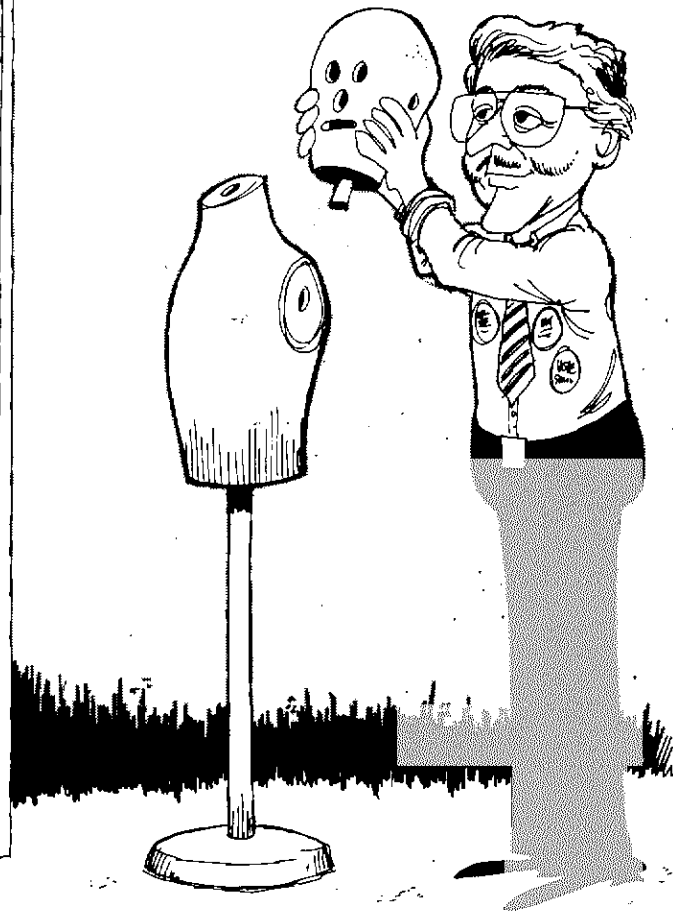
Structured samples have disadvantages. Complex designs frequently lead to the construction of extremely artificial and unrealistic statements. Construction of structured statements is somewhat more time consuming in that decisions must be made as to whether one statement or another reflects a particular dimension.

Unstructured samples are relatively easy to construct. After specifying the size of the Q sample, statements are generated through a serendipitous process until enough statements have been generated. Unstructured samples relieve the strategist of the responsibility for identifying the basic dimensions of voters' beliefs and values. Without this responsibility the strategist is less likely to impose his own conceptual categories on the sample.

Unstructured samples have their disadvantages. Without a conceptual structure there are few, if any, criteria



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for judging the completeness or representativeness of the Q sample. Most structured designs, in effect, build a degree of diversity into the sample. With an unstructured design the investigator may unwittingly create a homogeneous set of statements. The potential problem created by this condition could be very serious: Relatively homogeneous Q samples do not provide subjects the opportunity to express, through Q sorting, divergent beliefs and values.

Administering Q Sorts

After constructing a Q sample strategists must answer three basic questions: (1) what Q sorts will be performed? (2) how will the statements be ranked? and (3) to whom will the sorts be given?

A Q sort is a result of the thought process that guides subjects as they rank-order the elements of a statement sample along a continuum. The result of this ranking process "reflects the impact of mind in operation, of a person thinking, evaluating, and interpreting in relation to the array of stimuli brought to his focus of attention in the form of a Q sample" (Brown, 1980, p. 44).

To effect the principle of reinforcement, a strategist must employ two conditions of instruction. He must first ask subjects to model, in one sort, what they desire in public officials; then, in a second sort, he must ask them to model what they know about his client. A comparison of these two sorts, whether for one subject or for many subjects, will reveal which items of the statement sample are most popular and most credible (statements ranked positively in both sorts) and which are least popular and least credible (statements ranked negatively in both sorts).

Subjects usually rank-order statements along a forced-choice, quasi-normal continuum from least characteristic to most characteristic of their perceptions of the object of sorting. For example, the subjects of one study sorted fifty-six statements along the following forced-choice continuum:

	Least characteristic				Most characteristic				
Score	-4	-3	-2	-1	0	+1	+2	+3	+4
Frequency	4	5	7	8	8	8	7	5	4

Subjects were given a deck of fifty-six statements typed on 3-by-5 cards. Each subject was instructed to select only four statements that were most characteristic (+4), only five that were characteristic but somewhat less characteristic (+3), and so on, until all fifty-six statements were sorted into a particular pile. After the statements had been sorted, the number of each statement was written on a score sheet. The data from each score sheet were then coded and analyzed (see Brown, 1980, pp. 194-204).

Q-sorts are given to subjects who have been selected to represent variables deemed important to a campaign. For example, strategists may wish to take into account the image and issue concerns of partisans who support their candidate and his opponent. This suggests a P set structured along the following lines:

a. Democrats who support the candidate.

- b. Democrats who support his opponent.
- c. Republicans who support the candidate.
- d. Republicans who support his opponent.

By structuring a P set in this way, strategists may determine, through analysis-of-variance techniques, whether partisanship and candidate support affect image or issue concerns.

Ideally, from twenty-five to thirty subjects should be selected to represent each category of the P set. However, as Brown (1980) has argued, "All that is required are enough subjects to establish the existence of a factor for purposes of comparing one factor with another" (p. 192). Given a P set of one hundred subjects, all the major types of image and issue concerns will emerge from the Q sorts. To ensure that this happens, the P set should be structured so that those variables (e.g., partisanship and vote intention) that could conceivably affect image and issue concerns are represented.

Structured P sets are not always necessary. Strategists, although they should be concerned with designing campaign messages with general appeal, are not especially interested in what variables affect image and issue concerns. Rather, strategists are more interested in what kinds of image and issue concerns are evident in a constituency. Finding a sufficient number of subjects to represent each category of a complex P set can be extremely time-consuming, if not practically impossible. In short, unstructured P sets may be as useful to strategists.⁶

Analyzing Q Sorts

When individuals rank-order statements in roughly the same way, they share an image or perception of an object. Conversely, when they rank-order statements in different ways, they have different images. Whether subjects have sorted the statements in similar ways is determined through an examination of the correlations among the sorts. These correlations are factor analyzed to identify the various sorting patterns evident in the data. Campaign strategists must identify the types of ideal images (values) and the types of candidate images (beliefs) and then compare the ideal and the candidate types to develop positive and negative campaign themes.

A positive campaign theme asserts that the candidate has a particular quality or issue position. To develop positive themes, which are popular and credible, strategists should select qualities or positions that a candidate's supporters perceive in their ideal public official and which they perceive in him. For example, the results indicated that the state senator should say that he:

- ... takes a firm stand on pertinent issues but does not disregard the views of others.
- ... has the highest degree of honesty, integrity, and intelligence.
- ... is a leader who explains to the people as much as possible the reasons behind his actions and proposals.
- ... wants to promote economic growth in order to create more and better jobs for our citizens.
- ... sees support today for quality in education as our promise to the generation of tomorrow.

A *negative* theme asserts that he does not have a particular quality or position. To develop negative themes, which are popular and credible, strategists should select qualities or positions that his supporters do not perceive in their ideal and which they do not perceive in him. For instance, the results indicated that the senator could say that he was *not* someone who:

- . . . should be elected as a result of his party allegiance because talk is cheap and all candidates promise great things.
- . . . sees public office as simply a ladder to be climbed for fame and fortune.
- . . . is a big spender who's just too liberal with our tax dollars.
- . . . favors an increase in taxes for individuals.
- . . . would consider collective bargaining for public employees if strikes were banned.

Conclusion

This article has demonstrated how campaign strategists can effect the principle of reinforcement with Q methodology. By asking a relatively small sample of persons, selected theoretically, relatively many questions — defined subjectively, inductively, and operantly — strategists may conduct studies in which subjects determine which messages are most popular and most credible. For candidates who need research, but who cannot afford large-sample surveys, this approach provides a systematic methodology with which to discover campaign strategies.

Whether and to what extent strategies developed in this way are effective is a question that requires further study. Ideally, a campaigner could develop a strategy with Q methodology and then test the effectiveness of that strategy in a large-sample, multi-wave panel study. Applied research along these lines could add immeasurably to what is known about the effects of political campaigns.

Additional study is needed to determine whether Q methodology can be used to effect other strategic principles. For instance, invisible challengers must reinforce their likely supporters, create a sympathetic response among the undecided, and convert members of the opposition to their cause. The next Q studies should therefore focus on how to develop strategies that effect the principles of creation and conversion.

Notes

¹ The principal ideas of this article emerged in the course of my work with a Missouri state senator in the last election cycle. The senator — a well-known, relatively popular incumbent — was campaigning against an unknown, relatively invisible challenger in a district in which the senator had a definite partisan advantage.

² Brown (1980) provides the following definition of Q methodology:

Q technique is a set of procedures whereby a sample of

objects is placed in a significant order with respect to a single person. In its most typical form, the sample involves statements of opinion (Q sample) that an individual rank-orders in terms of some condition of instruction — e.g., from “most agree” (+5) to “most disagree” (−5). The items so arrayed comprise what is called a Q sort. Q sorts obtained from several persons are normally correlated and factor-analyzed by any of the available statistical methods. Factors indicate clusters of persons who have ranked the statements in essentially the same fashion. Explanation of factors is advanced in terms of commonly shared attitudes or perspectives. Q methodology is the body of theory and principles that guides the application of technique, method, and explanation. (pp. 5-6)

³ Statements may be generated in interviews with individuals or groups, by reviews of relevant literature, or through brainstorming by the strategist and his associates.

⁴ Q samples may have mixed designs. For example, in the Missouri study candidate-image statements were generated with a structured design that included political and stylistic dimensions (Nimmo & Savage, 1976, pp. 241-242). Political-issue statements, on the other hand, were generated with an unstructured design.

⁵ Structuring a Q sample involves conceptualizing its dimensions clearly enough to reduce the ambiguity often associated with the process of assigning statements to those dimensions. As is generally true with any system of classification, these dimensions should be — in most cases — mutually exclusive and collectively exhaustive. For ideas on how to structure candidate-image samples, see Nimmo and Savage (1976). For ideas on how to structure political-issue samples, see Cragan and Shields (1977) and Stephenson (1964).

⁶ In the Missouri Q study the interviewers found neither enough Republican identifiers nor a sufficient number of potential supporters of the challenger for a detailed analysis of the effects of partisanship and vote intention. The analysis was therefore limited to 32 likely supporters of the incumbent.

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