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Data Analysis & Research for Public Affairs
& Case Study on Reputation Measurement

9 July 2025

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Today's Agenda

Using Data Analysis to Inform Public Affairs Decisions

1 **Terms, Approaches and Use Cases for Public Affairs Research**

2 **Tesla Case Study**
Global Reputational Freefall

Brandon Olsen
Research Solutions AVP, EMEA

With experience in political strategy, public affairs, and corporate reputation and communications research, Brandon helps our clients around the world understand their target audiences, refine messaging, and measure the long-term trajectories of their reputation.

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The Role of Communications is Evolving

COMMS RESPONSE

Communications is no longer a support function — it is a strategic force at the heart of corporate decision-making.

The Chief Communications Officer now sits at the C-Suite table, guiding reputation, risk, and business strategy with data and foresight.

The concept of "having a seat at the table" is old news – We are now in the era of strategic advisors who shape the business agenda.

CHALLENGE

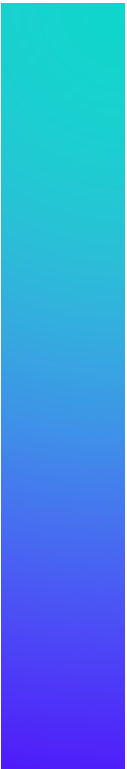| Challenge	Comms Response
Real-Time Volatility & Sentiment Shifts	Predictive monitoring, emotional resonance
Loss of Stakeholder Confidence	Pair action with clear narrative context
Fragmented Stakeholders, Conflicting Values	Segment communications using emotional relevance
AI, Ethics & Technology Risk	Embed reputation guardrails in innovation strategies

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About Morning Consult

01   **Decision intelligence** is Morning Consult's North Star
Our mindset is laser-focused on empowering faster, deeper and actionable insights

02   **Technology-enabled sampling** is the foundation for all our products and solutions
This allows us to create high frequency data at scale, fueling our research and analytics to uncover hidden insights

03   **End-to-end data creation and curation process built upon technology, analytics and expertise**
In a world of messy data, this ensure our results and recommendations are as accurate as possible

04   **Grounded in evidence of how people think, feel and act and how this translates into commercial impact**
We embed our IP in our offers, so the design ensures actionability tied to the decisions you need to make

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Insights at every level of granularity, in whatever form you need them

CONTEXT & TRENDS	ALWAYS-ON DATA	BESPOKE INSIGHTS

Pro
Reports & Analysis

Actionable macrotrend reports & analysis from our team of consumer, economic & political experts.

Intel
Consumer Insights Platform

Easy-to-use platform providing unparalleled access to global consumer, brand, economic and political data.

Custom
Flexible Solutions

End-to-end research capabilities connecting high-quality data with actionable insights

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Terms, Approaches and Use Cases
for Public Affairs Research

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Taking a step back, there are some basic research terms for everyone to know

- **Sample** - a group of people selected from a larger population to participate in a survey or study

- **Oversample** - intentionally including more people from a specific subgroup to ensure you have enough data to analyse (such as an oversample of Millennial Labour Voters vs a base sample among all Voters in the UK)

- **Margin of Error** – potential difference from the "true" opinion and your research results – e.g., intentionally including more people from a specific subgroup; driven by sample size

- **Statistical Significance** - whether the results you see in your data are likely due to a real difference, rather than just random chance

- **Banners / Crosstabs** – data tables that break down survey results by different groups, like age, gender, or political affiliation

- **Open End Responses** - answers to survey questions where respondents can write or say (if using an audio or video open end) whatever they want instead of choosing options pre-selected by the survey writer

Research Methods to inform Public Affairs teams

- **Message Testing** - evaluating different messages, slogans, or talking points with target audiences to see which ones are most persuasive, memorable, or likely to drive action ensuring messages resonate and are tailored to your key audiences

- **Reputation Research (Tracking and Deep Dives) -** measurement of how the public, stakeholders, or specific groups perceive your organization, brand, or leaders; deep dives are more detailed studies that explore the reasons behind those perceptions

- **Narrative / Issue Recall and Salience** – measures how well your target audience remembers your key messages, stories, or issues after exposure to campaigns or media coverage or how well-known potential reputational problems are by those audiences now; pairs well with media monitoring and social listening

- **Thought Leadership** – externally released research to either support or be the focus of communications efforts to drive perceptions of a brand or organization as a thought leader on specific issues

- **Crisis Response / Tracking** – can include a variety of approaches to help communicators and leaders respond to a crisis before it gets worse (with Narrative Salience/Recall research), refine messages to address the crisis (with Message Testing) and track the salience and impact of the crisis over time

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How to read / interpret data tables

Audience	All Adults (A)	Voters Oversample (B)	Millennials (C)	Gen Z (D)
N	2,200	250	550	450
Margin of Error	+/- 2%	+/- 6%	+/- 4%	+/- 5%
Positive Message Test	60%	50%	58%	55%
Negative Message Test	40%	50%	42%	45%
Significance Testing	B	A	--	--

- Voters Oversample differ from the Adult Sample significantly preferring Message B by a margin larger than the margin of error

- Millennials and Gen Z do not differ significantly in preference with results within the margin of error

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Message Testing

Of the two claims you've seen, which do you find to be more persuadable?

- Positive Message
- Negative Message

62%
38%
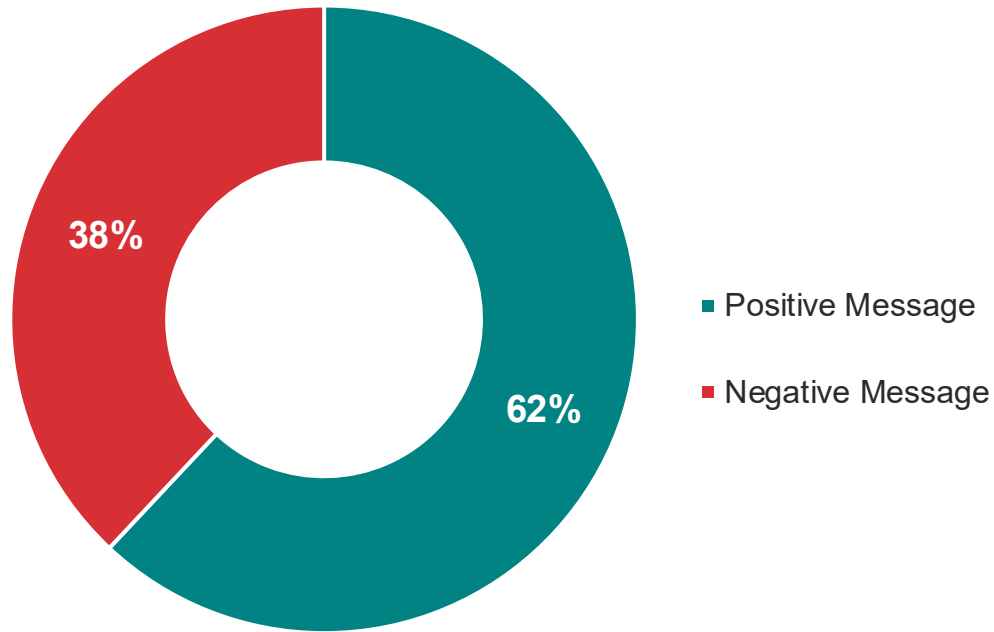
Demographic	Positive Message	Negative Message
Issue: Very Familiar (n=82)	74%	26%
Product Neutral or Negative Opinion (n=66)	56%	44%
Client Brand Favorable (n=123)	62%	38%
Policy Topic Expert (n=43)	81%	19%

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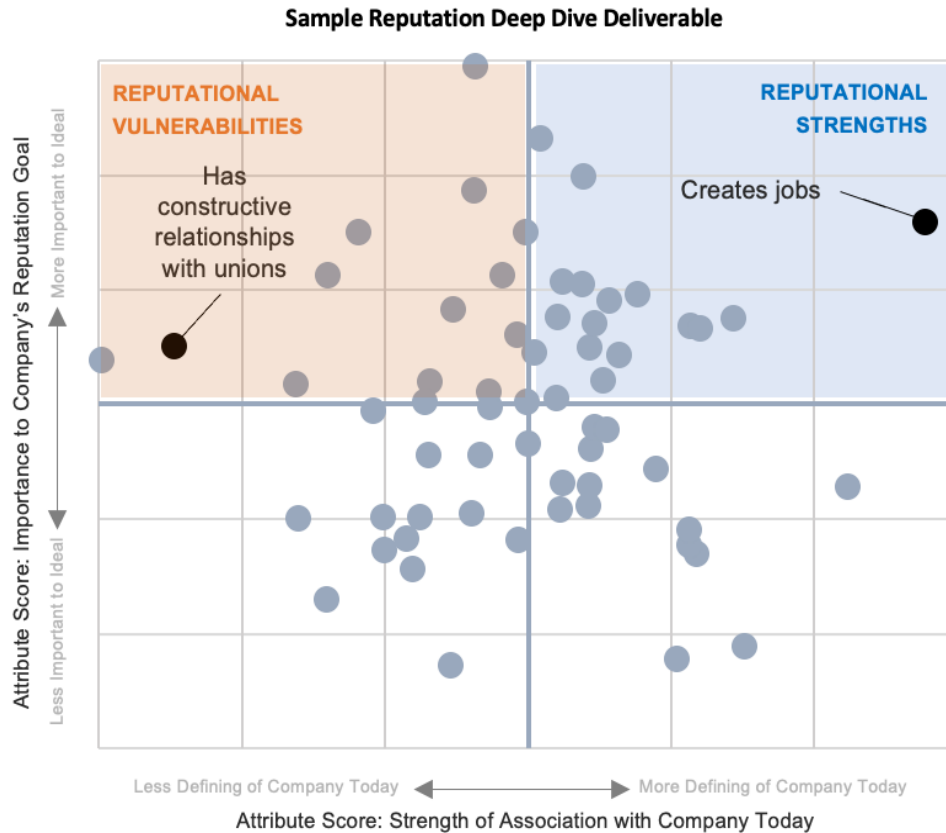
Open-End Analysis

Why do you find this message to be more persuadable?

Message	Positive Message	Negative Message
Tone	Positive, balanced, guiding	Attention-grabbing, surprising, challenging
Focus	Dual benefits (environment + cost)	Rational, data-driven decision-making
Illustrative Quote 1	"It appeals to a broad audience by striking a balance between sustainability concerns and realistic financial considerations."	"Most people assume that [product] is the most harmful, but data directly overturns this perception…"
Illustrative Quote 2	"It provides concrete data support…significant advantages.	"Because it totally grabs attention."
Illustrative Quote 3	"This message is clearer and more appealing, and I find it more persuasive because it quantifies the cost and environmental advantage."	"I have also heard that [product] have advantages over other materials in terms of cost and lightweight"

Note: For this analysis we used an internal AI tool to examine the full set of open-end responses and identify the differences between the two messages

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Reputation Research (Tracking or Deep Dives)

Sample Reputation Deep Dive Deliverable

REPUTATIONAL VULNERABILITIES

REPUTATIONAL STRENGTHS

Has constructive relationships with unions

Creates jobs

Attribute Score: Importance to Company's Reputation Goal

More Important to Ideal

Less Important to Ideal

Less Defining of Company Today — More Defining of Company Today

Attribute Score: Strength of Association with Company Today

- In addition to understand where an organization compares to competitors, reputational research can be used to identify key strengths and vulnerabilities with your current reputation

- These analyses inform future communications plans to take advantage of strengths and improve vulnerabilities

- This 2x2 chart shows where such strengths and vulnerabilities lie for this example

Narrative / Issue Recall and Salience

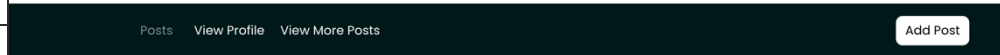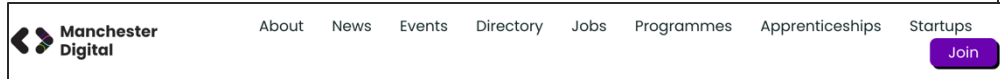## Tracking an Evolving Landscape of Gen AI Narratives
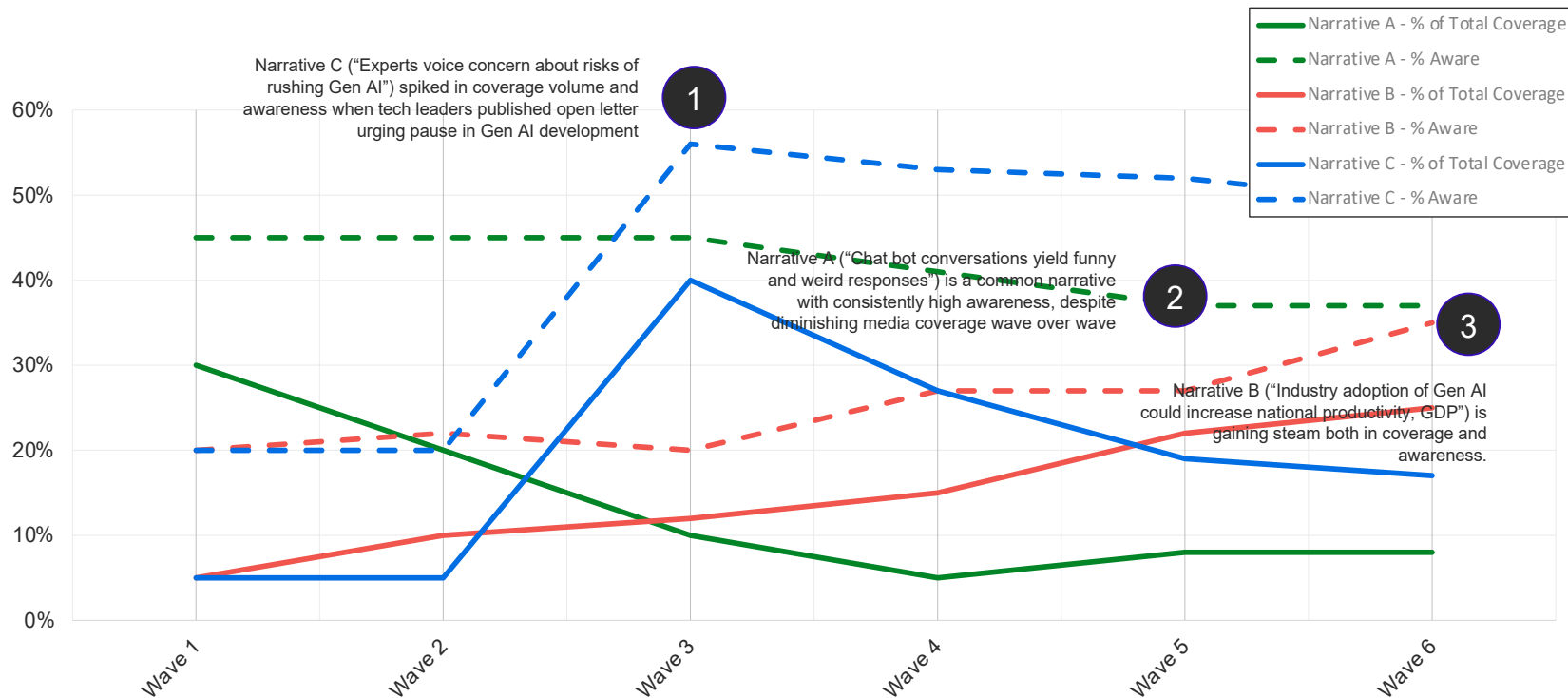
- Narrative salience can be helpful as a one-off study or as a tracking program to see how recall changes over time

- Paired with analysis on media habits of your target audiences, you can discover which narratives are "sticking" and where people are seeing, hearing or reading about them

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Thought Leadership

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News in Focus | Business & Money | Science & Tech | Lifestyle & Health | Policy & Public Interes

IBM Study: More Companies Turning to Open-Source AI Tools to Unlock ROI

Manchester Digital

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IBM Research Shows AI Investment is Anticipated to Rise in 2025

Key EMEA findings include:

Companies are betting on AI for the long term

- 80% of EMEA ITDMs surveyed reported that their company has made progress in executing its AI strategy, with a third (31%) reporting significant progress. This falls slightly below the global average of 43%.
- Despite this, only 38% reported positive ROI from AI investments compared to the global average of 47%. France came in the lowest, with only 29% reporting positive ROI.
- This lack of short-term ROI, however, is not discouraging companies. 40% of EMEA ITDMs reported that AI investment was equally innovation-driven and ROI-driven, with just 5% reporting their strategy was exclusively ROI-driven.
- Productivity time savings (22%) and faster software development (26%) were identified as the two highest metrics for ROI, as opposed to traditional financial savings.
- Respondents remained optimistic about long-term success, with 70% expecting to achieve positive ROI within 2 years.

Crisis Response Case Study

When a Brand Becomes a Political Punching Bag

When our client found themselves in the center of national political discourse, Morning Consult's real-time data and strategic communications expertise equipped leadership with the insights it needed to make confident decisions at the speed of the news cycle

In the Trenches on Day One

As soon as headlines broke, Morning Consult…
- Armed the VP Comms with baseline brand from our platform and contextual data on the social issue from our analyst team
- Designed an instrument to size the threat and, if needed, track momentum over time
- Dedicated a team of researchers and data scientists for agile support

CONTINUOUS TRACKING, ADAPTED OVER TIME

CEO Response Message Tests
Series of overnight surveys to inform CEO messaging as the issue gained momentum

Marketing Creative Iteration Tests
Multiple next-day and same-day concept tests to de-risk marketing efforts

Consumer Segmentation
Analysis of massive tracker dataset to focus company efforts on high-risk consumer groups

Brand & Leader Messaging Revamp
Recalibrated positioning to adapt for high-volume season and the next fiscal year

As challenges emerged throughout the year, Morning Consult's speed and agility eliminated delays and gut-driven decisions, delivering clear insight into the best path forward

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Tesla Case Study
Global Reputational Freefall

Our New Lens on Reputation

ACTIONABILITY

Why Reputation Needs a New Lens

Reputation Challenges in 2025

	01	02	03	04
Why it Matters	**Trust Deficit**	**Polarization & Narrative Risk**	**Reputational Speed & Volatility**	**Identity Fragmentation**
	Erosion of baseline corporate credibility	Words can fracture audiences or backfire	Companies must act and react in real time	Emotional relevance is key to loyalty, advocacy, and forgiveness

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A Simpler, Sharper Score for Reputation

Our Strategic Point of View:	A Single, Trusted Metric

Corporate Credibility & Character
Captures how stakeholders assess the *ethics, responsibility, and integrity* of the company

Trust, Admired Employer, Community Impact

Brand Appeal
Measures the *emotional connection and perceived value* of the brand experience

Favorability, Value

This score provides communicators with a unified, modern language to diagnose and discuss brand health.

Always-On Reputation Monitoring

Our syndicated platform tracks 5,000+ brands daily.

This is your source for:
- Market context
- Comparisons with competitors
- Demographic-specific insights
- Trendlines for brand equity

Clarity in Complexity
Built on 80M+ interviews across 40+ markets, our score turns stakeholder sentiment into a clear signal you can act on.

Real-Time & Global
Updated daily, benchmarked across industries and regions, and fully transparent in methodology.

With MCI, Comms leaders now have real-time visibility into shifts in perception—without waiting for quarterly reports.

Tesla Example

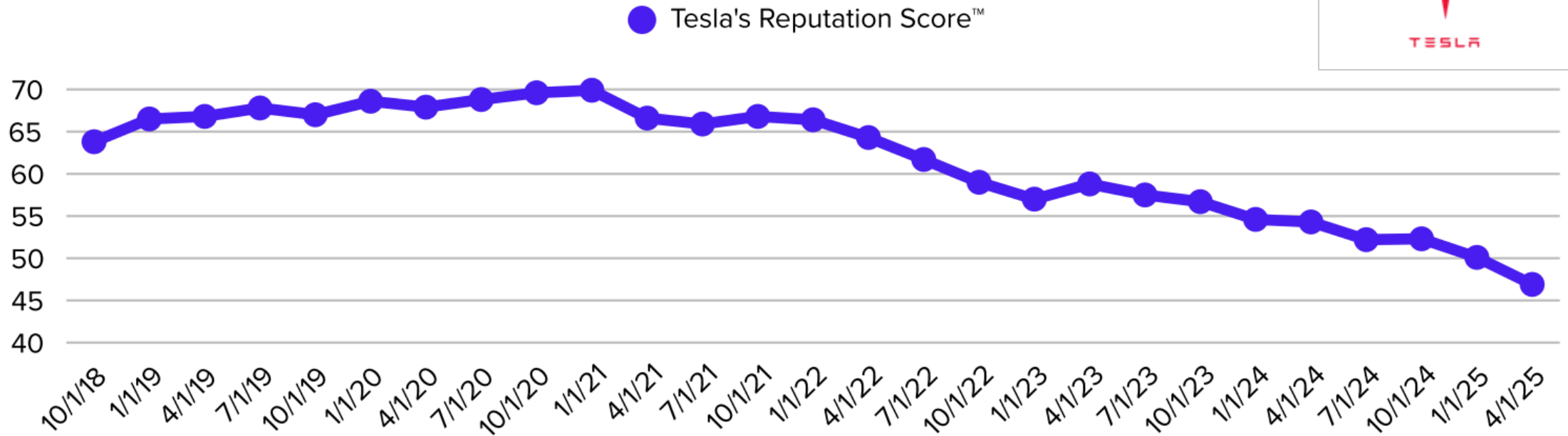Ongoing erosion of reputation can be tied to the lack of trust and the impact of leadership.

| Tesla Reputation | > | Comms actionability – Narrative enhancement | > | Self-expansion of the brand: Values, Identity, Emotional Connection |

● Tesla's Reputation Score™

Tesla Example

Ongoing erosion of reputation can be tied to the lack of trust and the impact of leadership.

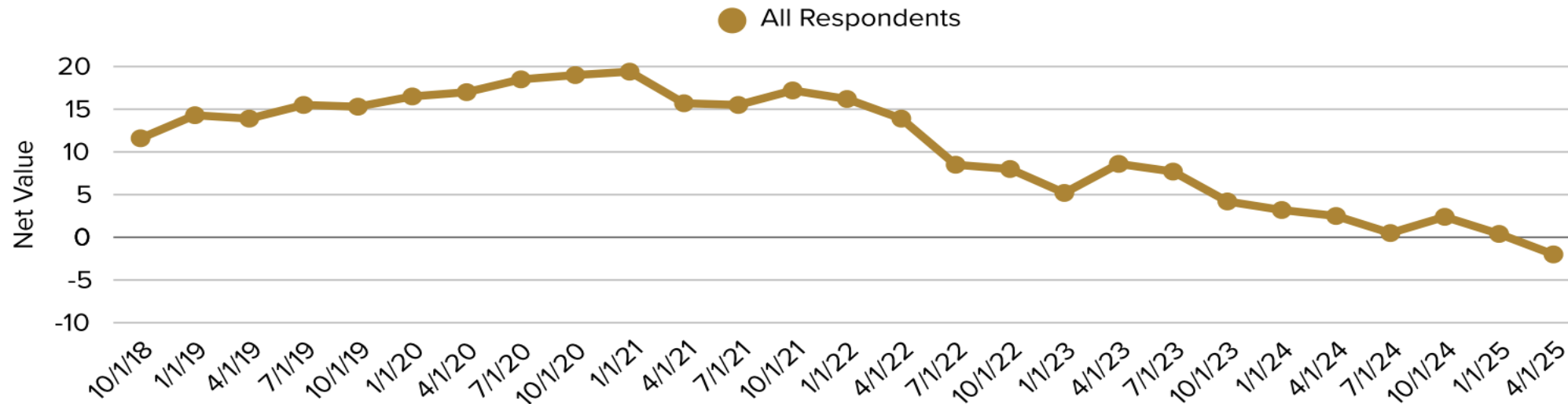"Would you buy a Tesla?" ❯ Comms actionability – Narrative enhancement ❯ Self-expansion of the brand: Values, Identity, Emotional Connection

Tesla's Perceived Value Peaks in 2021

● All Respondents

Net Value axis: 20, 15, 10, 5, 0, -5, -10

X-axis: 10/1/18, 1/1/19, 4/1/19, 7/1/19, 10/1/19, 1/1/20, 4/1/20, 7/1/20, 10/1/20, 1/1/21, 4/1/21, 7/1/21, 10/1/21, 1/1/22, 4/1/22, 7/1/22, 10/1/22, 1/1/23, 4/1/23, 7/1/23, 10/1/23, 1/1/24, 4/1/24, 7/1/24, 10/1/24, 1/1/25, 4/1/25

Tesla Example

Ongoing erosion of reputation can be tied to the lack of trust and the impact of leadership.

Tesla Reputation	›	Comms actionability – Narrative enhancement	›	Self-expansion of the brand: Values, Identity, Emotional Connection

In Wake of Political Stances, Tesla's Additional Reputation Metrics Decline

● Net Trust   ● Net Favorability   ● Net Community Impact   ● Net Employer Admiration

Tesla Example

Ongoing erosion of reputation can be tied to the lack of trust and the impact of leadership.

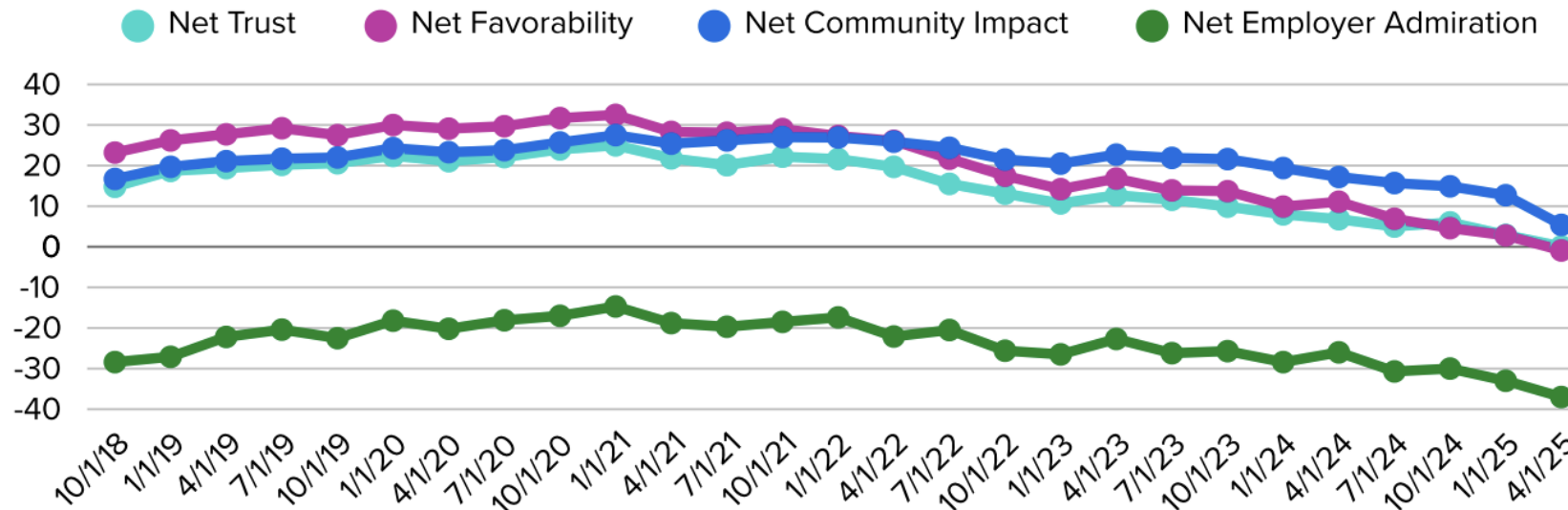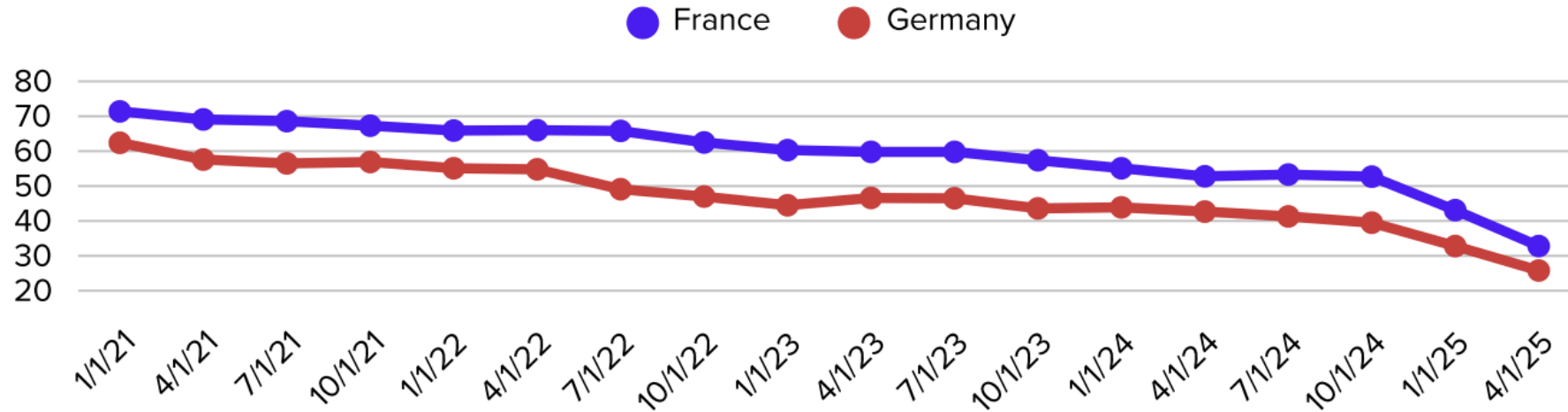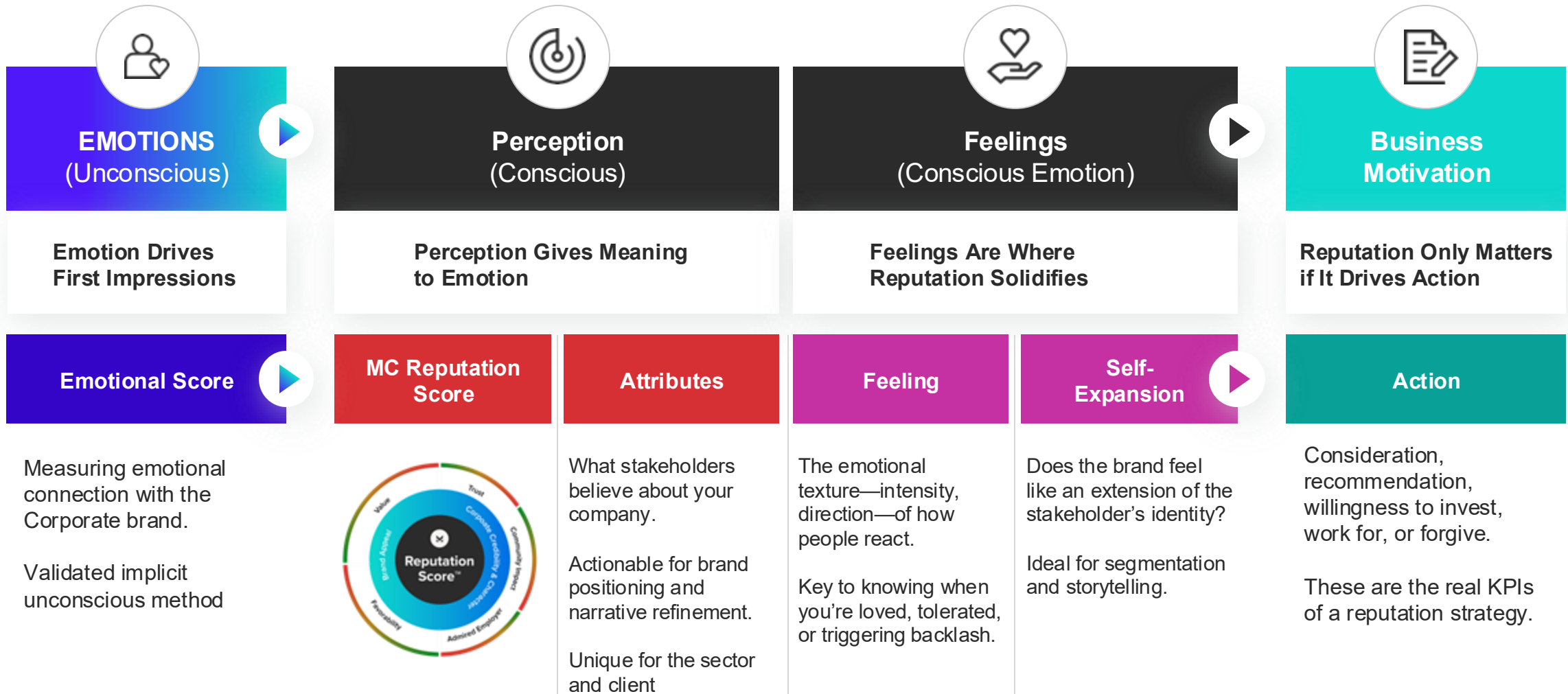| Tesla Reputation | > | Comms actionability – Narrative enhancement | > | Self-expansion of the brand: Values, Identity, Emotional Connection |

Tesla's Reputation Score Hit Globally

● France ● Germany

A New Model Built for Communications

EMOTIONS (Unconscious)	Perception (Conscious)	Feelings (Conscious Emotion)	Business Motivation
Emotion Drives First Impressions	**Perception Gives Meaning to Emotion**	**Feelings Are Where Reputation Solidifies**	**Reputation Only Matters if It Drives Action**

Emotional Score	MC Reputation Score	Attributes	Feeling	Self-Expansion	Action
Measuring emotional connection with the Corporate brand. Validated implicit unconscious method		What stakeholders believe about your company. Actionable for brand positioning and narrative refinement. Unique for the sector and client	The emotional texture—intensity, direction—of how people react. Key to knowing when you're loved, tolerated, or triggering backlash.	Does the brand feel like an extension of the stakeholder's identity? Ideal for segmentation and storytelling.	Consideration, recommendation, willingness to invest, work for, or forgive. These are the real KPIs of a reputation strategy.

Reputation Score™

It Starts With Emotion

EMOTIONS
(Unconscious)

Emotion Drives First Impressions

Emotions are the automatic, gut-level reactions stakeholders have toward a company. These reactions are effective, fast, and largely subconscious.

This is the starting point of affinity or aversion — often shaped by tone, symbolism, crisis response, and authenticity.
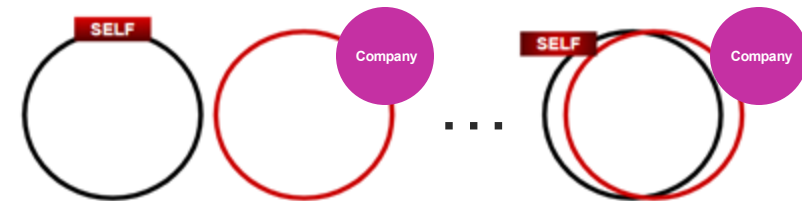
The Method

True Emotional Understanding

Brand Self Study
Measuring emotional connection with the Corporate brand

Q: How emotionally close or distant do you feel from [Company]

Distant
[Company] remains 'external' (Not self-involving)

Close
[Company] is seen as a meaningful venue for 'self-expansion'

Messaging only works if it aligns with how people feel. You can't fix perception without first understanding emotion.
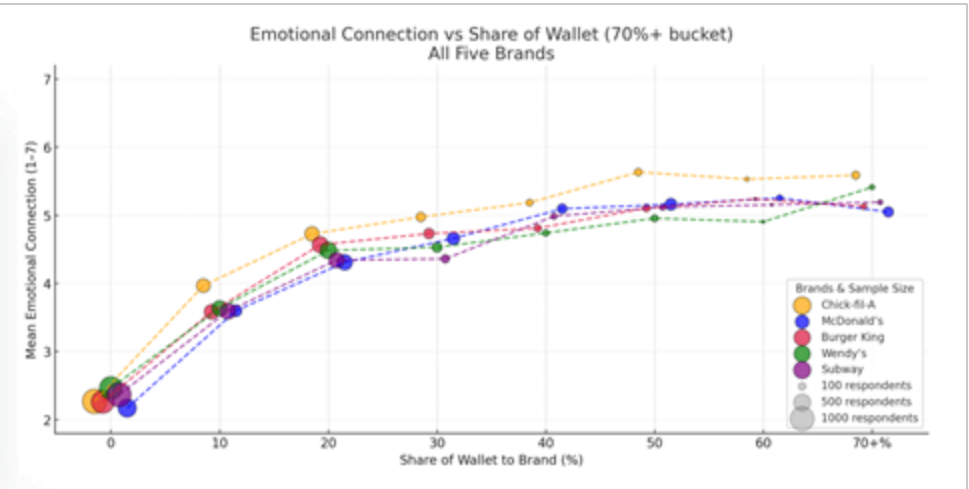
It Starts With Emotion

Validation from Brand Work

Conducted research on QSR brands and their correlations to Share of Wallet

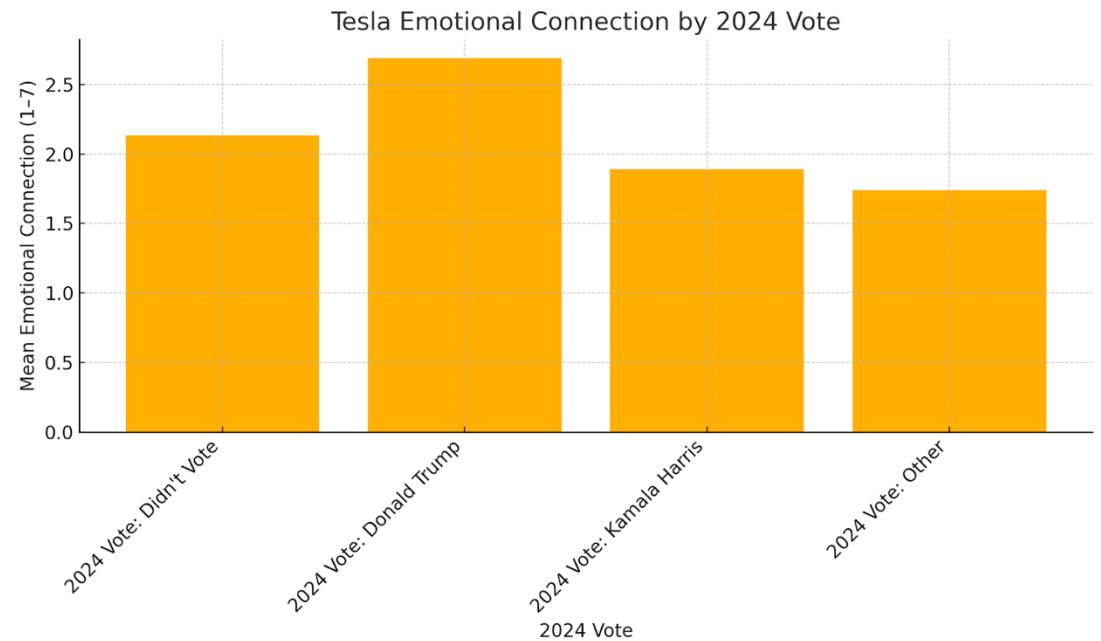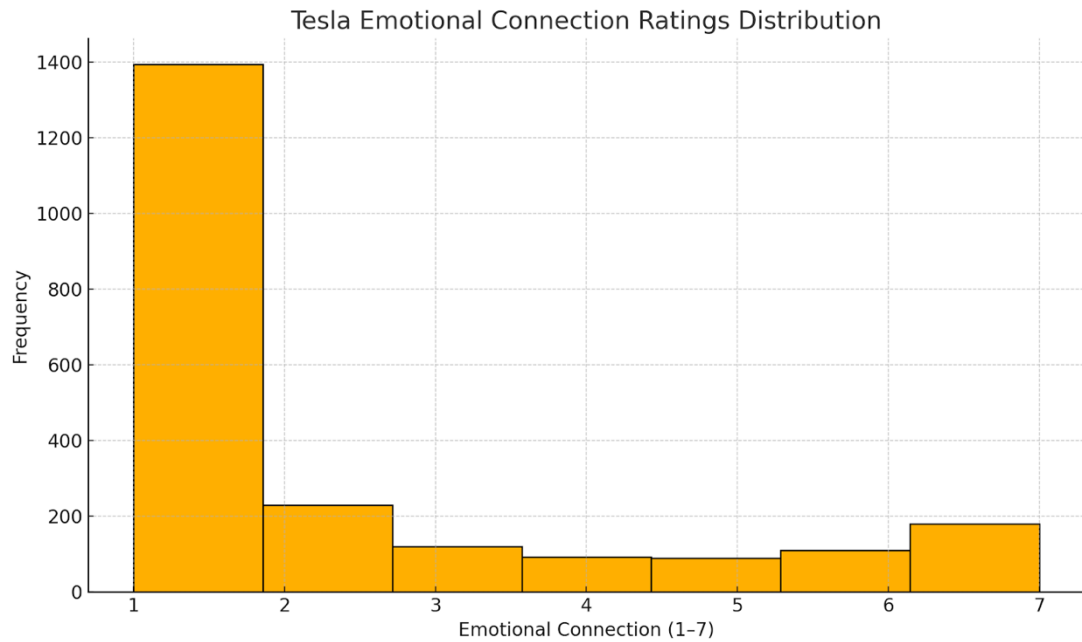Emotional Connection vs Share of Wallet (70%+ bucket)
All Five Brands

Emotions to Action

Conducted research on Restaurants, Banks, FinTech, Telecommunications, Automotive and Beverage brands to see the correlation from Emotions to Actions.

Mean Emotional Connection by Brand
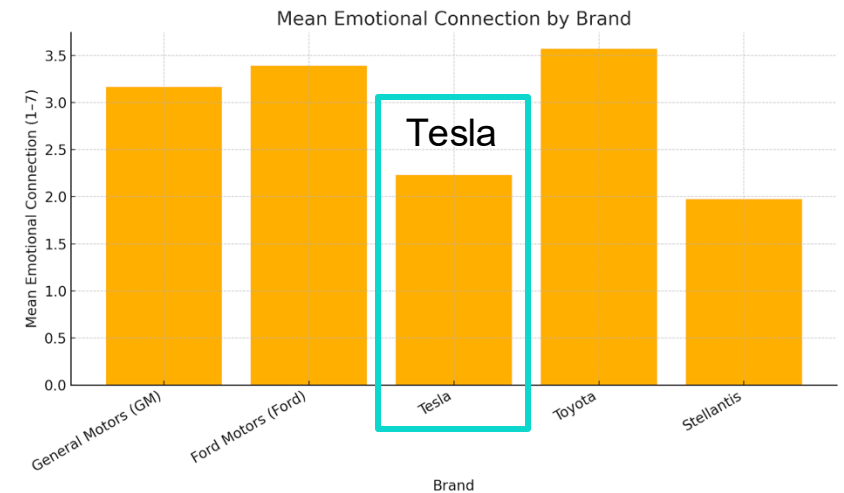
Tesla

Tesla's Emotional Disconnect is deep and across political lines

A brand once synonymous with environmentalism and sustainability has severed its relationship with like-minded voters in the United States

Takeaway: From Emotions to Actions

Emotion Unconscious	**Perception** Conscious	**Feeling** Conscious Emotion	**Business Motivation**
Emotion Drives First Impressions	**Perception Gives Meaning to Emotion**	**Feelings Are Where Reputation Solidifies**	**Reputation Only Matters if It Drives Action**

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Get a Personalized Briefing on Your Reputation

Reach out to schedule a dedicated session where we will:

- ❏ Walk through your **Reputation Score** in detail

- ❏ Benchmark your performance against key **industry peers**

- ❏ Explore **audience-level insights** to uncover what's shaping your reputation

- ❏ **Identify immediate opportunities** based on your current position

- ❏ Learn how Morning Consult's **Custom Solutions** can help you investigate root causes, test messaging, and guide strategy

Scan the QR code to schedule your custom briefing. Let's turn insight into action.

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...and try out our free AI Research Chat to answer questions about your brand / market / audiences

Reach out to schedule a dedicated session where we will:

❏ Ask about your brand's **favorability and trust**

❏ Compare with industry peers **across audiences and countries**

❏ Explore **economic and political sentiment** to uncover what's shaping trends in your market

❏ **Trend data over time** to understand how your brand perceptions have changed

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