

# Communications Campaign Best Practices



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## Introduction

### Effective Communications Campaigns

If we asked you to name three advertising campaigns that fundamentally changed America, you'd probably need some time to think. But what if we asked you to name three ideas that changed America? You might mention "the war on terror," "gun safety," "liberal media bias," or "global warming." Or, you might rattle off some of the biggies—all men are created equal, for example, or freedom of speech.

The point is this: It's not about your campaign. It's about shaping the way America talks about your issues. Fundamental change in America requires a long-term battle over ideas, not just clever billboards. The political right knows that it's easier to sell "exploration for energy" than to talk about "drilling in nature preserves." Whoever defines the issues in a way that mobilizes public support wins the debate.

That's why effective communication campaigns require planning and homework. *The Art and Science of Framing an Issue* explains how to define your issue to create public support.

However, framing is only part of the solution. You also need to communicate your message. How are you going to talk about your issue? Who's going to say it? To what target audience? Through what media, on what budget, and to accomplish what goals? *Communications Campaign Best Practices* brings together everything you need, from information on setting a campaign objective to measuring your campaign's results—and everything in between.

Together, these two documents will help you define your issue and effectively get your message out—and ultimately, help shape how Americans understand LGBT people and equality.

### Elements of an Effective Communications Campaign

Whether you hire a professional agency to promote your issue, or execute an in-house campaign on a shoestring budget, it's helpful to understand what makes a campaign succeed. The chart on the following page summarizes the major elements of an effective communications campaign. Turn to the corresponding section for a more complete description of each campaign element.



*Ideas that are changing  
America: Gun safety*

## Setting a Campaign Objective

Before launching a campaign, get agreement on what you're trying to accomplish. This may seem obvious, but it's quite common for the campaign objective to be assumed rather than spelled out—and assumptions can lead to trouble. If you expect the campaign to get people to stop and think, but your executive director expects it to stop traffic, you have a problem. All parties involved in the campaign need to agree to the objectives up front. That way, when the ad agency presents a traffic-stopping ad that won't change public opinion, you can confidently send it back to the drawing board. Having an up-front agreement on objectives sets the tone for the entire campaign and influences all decisions going forward.

### Four Things to Consider When Setting Campaign Objectives

You should answer four major questions when setting your campaign objectives:

1. **What's the goal of the campaign?** Be very clear about what you want the campaign to do. Should it educate the public about an issue? Change behavior? Win a short-term political fight? What you're trying to do directly affects how you'll do it.

*If your campaign is about passing legislation, getting votes, or fighting a ballot initiative, you may need to forgo messages that are personally important to you and instead use messages that move the public.*

## Elements of an Effective Communications Campaign

Campaign Element	The Question You Need to Answer	If You Only Remember One Thing, Remember This	Corresponding Fact Sheet(s)
<b>1. Campaign objective or goal</b> (clearly stated and agreed to by all parties)	What are you trying to accomplish?	A good campaign requires focus. If you try to do too much, you won't do anything well.	<ul style="list-style-type: none"> <li>• <b><i>Setting a Campaign Objective</i></b> (pg. 3)</li> </ul>
<b>2. Target audience(s)</b>	Who are you trying to reach?	"The general public" is not a target audience. If you try to reach everyone, you'll end up reaching no one.	<ul style="list-style-type: none"> <li>• <b><i>Target Audience</i></b> (pg. 7)</li> </ul>
<b>3. Messages and research</b>	What are you going to say to your audience so they'll take notice, listen, and hopefully become supportive?	What resonates for you and your base often doesn't work for your target audience. The difference between messaging that you like and messaging that is effective can be huge. It generally takes research to know the difference.	<ul style="list-style-type: none"> <li>• <b><i>Messaging and Creative Development</i></b> (pg. 9)</li> <li>• <b><i>Marketing Research Overview</i></b> (pg. 13)</li> <li>• <b><i>Qualitative Research</i></b> (pg. 17)</li> <li>• <b><i>Quantitative Research</i></b> (pg. 21)</li> <li>• <b><i>Creative Testing</i></b> (pg. 29)</li> </ul>
<b>4. Media communications plan</b>	How are you going to reach your audience?	People generally need three exposures to a message before they hear it. Your media plan should reach the same people multiple times. Don't spread media placements too thin.	<ul style="list-style-type: none"> <li>• <b><i>Media Planning</i></b> (pg. 31)</li> <li>• <b><i>Getting Media Coverage</i></b> (pg. 37)</li> <li>• <b><i>Press Releases</i></b> (pg. 41)</li> <li>• <b><i>Integrating Acts of Protest</i></b> (pg. 47)</li> </ul>
<b>5. Messengers or spokespeople (clearly identified)</b>	Who's going to say it?	The best spokesperson may not be your executive director, your staff, or even your constituents. There's often a big difference between who you like and trust, and who your target audience likes and trusts.	<ul style="list-style-type: none"> <li>• <b><i>Effective Spokespeople</i></b> (pg. 51)</li> </ul>
<b>6. Budget</b> (with adequate resources)	How much money do you have to make it happen?	If you don't have enough money to launch an effective campaign that's based on research, you're better off not doing it. If you have a limited budget, look at slimming down your target audience, reducing paid placements, or increasing emphasis on earned media.	<ul style="list-style-type: none"> <li>• <b><i>Setting a Budget</i></b> (pg. 53)</li> </ul>
<b>7. Campaign evaluation</b>	How will you know what worked and what didn't?	Investing in campaign evaluation is worthwhile. It helps you gain credibility with funders and ensures that money is well spent in the future.	<ul style="list-style-type: none"> <li>• <b><i>Campaign Evaluation</i></b> (pg. 55)</li> </ul>

**2. Do you want to change public opinion, or communicate messages that are important to you? They're often two different things.** Social justice advocates sweat, bleed, and forgo their chance to make millions in corporate America because they care deeply about their issue. Advocates often want others to not only stop opposing them, but also to understand that their issue is right and just.

Imagine you care about global warming and your dad is debating between a Hummer and a Prius. Your dad doesn't give a flip about the environment, but he does worry about his pocketbook. While you want to use arguments that make him care about the Earth, he'll buy the Prius if you explain how much he'll save in gas and on the purchase price.

In other words, what you want to communicate (e.g., the justness of your cause) and what actually helps to change minds, behaviors, and votes, may be two entirely different things. If your objective is to win on an issue, you need to use messages that research shows actually moves public opinion on the issue. Do you actually want to protect LGBT families or do you want to *talk about* protecting LGBT families? If your campaign is about passing legislation, getting votes, or fighting a ballot initiative, you may need to forgo messages that are personally important to you and instead use messages that move the public.

**3. Is the campaign short- or long-term?** The length of your campaign affects the approach you can take. Short-term campaigns don't have time to educate; they must move people quickly. Alternatively, long-term campaigns can focus on educating the public and changing opinions over time—sometimes just by building familiarity. Research shows, for example, that images of two gay men with a child creates significant negative backlash. While we wouldn't recommend using this imagery to fight a short-term adoption initiative, it could be appropriate as part of a long-term public education campaign about LGBT families. Keep in mind, however, that long-term campaigns require careful staging to build acceptance over time. If the campaign uses increasingly edgy images or phrasing, make sure you have enough exposure of each ad in the series that people can follow the progression and warm

**Tip: Try to get the buy-in of all key stakeholders, including other LGBT groups potentially affected by the campaign.**

In the early stages of campaign planning, Arizona Together held a Town Hall to discuss how to fight an upcoming Super DOMA ballot initiative (i.e., a constitutional amendment to ban both marriage and civil unions/domestic partnerships for gay couples). The several hundred advocates in attendance agreed that the goal of the campaign should be to successfully fight the initiative, not to educate the public on LGBT issues or promote messages to rally the base. This upfront agreement on objectives kept the campaign on track when message testing resulted in an emphasis on straight domestic partners—as opposed to the traditional focus on same-gender couples preferred by most advocates.



**Tip: Messaging to win may mean using messages outside your established comfort zone.**

One environmental group prevented an airport expansion by talking about noise pollution instead of wetlands protection, even though wetlands protection was the issue they personally cared about. Similarly, the television commercial that tested best (and was eventually aired) in the Arizona Together campaign featured straight couples, not gay or lesbian couples. It may have felt uncomfortable to focus on straight couples, but it paid off on Election Day when Arizona Together became the first campaign ever to defeat an anti-gay marriage ballot initiative.

## Responding to a Ballot Initiative (or Similar Situation)

We'd like to acknowledge how hard it can be to choose between running a winning campaign and running a campaign that says what you want to say. Perhaps you've been running on a shoestring budget for years. Suddenly, your state is facing a ballot initiative (or similar measure) and the spotlight is on you. You have funding at levels you've never seen before. It feels like your chance to finally get your message across. You don't want to talk about how the Super DOMA will hurt heterosexual senior citizens, you want to talk about LGBT families. It's a natural feeling, but it's also a good way to lose your fight.

The good news is that messaging to win the short-term battle can also be one of the best ways to increase long-term support. If you can change public opinion on a major issue that affects LGBT people, you'll also shift overall attitudes toward LGBT people. A successful campaign also attracts future donors. Most importantly, you'll have helped enact important legal protections or defeat proposed legislation that would cause significant harm to the LGBT community.

Messaging to win also takes conviction and leadership. It requires you to clearly define what you're trying to accomplish and be direct about what you're giving up. It means building support and educating others about your campaign message, and disciplined focus amid criticism from those who want to communicate a different message. It means running the campaign from your head, not your heart.

In 2005, Arizona Together decided it had a chance to defeat the 2006 Super DOMA if it did three things. First, hire a professional firm to help run the campaign. Second, ask the firm to conduct research. Third, ruthlessly follow the firm's advice based on the research. Some advocates opposed the campaign's resulting focus on straight couples, arguing it would do nothing to further long-term support for LGBT equality. However, highlighting straight couples helped the target audience relate. Once Arizonans saw how the Super DOMA hurt "couples like them," it was easier to empathize with same-gender couples in similar situations.

gradually to the ideas and creative concepts. Also make sure that the campaign moves slowly enough that people have time to adjust. Unfortunately, very few non-profits have the resources to stage effective long-term campaigns.

4. **How can the campaign help us build a stronger community?** Campaigns aimed at the moveable middle generally won't use messages that energize your constituents and supporters. However, these campaigns still present an excellent opportunity to strengthen your organization, membership base and allies. Use the campaign as a reason to reach out. Help others understand what you're doing and why.

Instead of changing your messages, rally the community by holding educational and discussion forums; organizing canvassing efforts that mobilize volunteers and voters; engaging allies such as local clergy, business leaders, and volunteers; etc. Capacity building and field work plays a vital role in ensuring your local community or state comes out of a campaign stronger than it was before. Messaging and communications discipline don't mean these goals aren't important—it simply means that communications to the moveable middle are separate from communications and strategies for working with your base.



## Target Audience

### This Campaign Isn't About You

Unless the campaign goal is to fundraise or mobilize the base, your target audience will likely consist of people who are on the fence or mildly unsupportive of your issue. The campaign needs to be about *them*, using imagery and messages that appeal to them, with ad placements in media that they read, watch, or listen to.

What works for you and what works for your target audience are likely two different things. You may want your dad to understand that Hummers are an environmental travesty. However, if he simply rolls his eyes and continues on to the dealership, then you've encountered a typical mistake in communications campaigns. If your dad primarily cares about his pocketbook, are you prepared to forgo your environmental argument and talk about how much the Hummer will cost him? Would you rather be *right*, or would you rather prevent your dad from buying a Hummer?

### The General Public Isn't a Target Audience

Chances are you have a limited budget. This means you can't reach everyone, since the more people you try to reach, the more money it costs. Decades of marketing research shows that unless a message reaches an audience three or more times, the message goes unheard. That means you have to focus your campaign if you want to avoid the drop in the ocean effect. The question remains: How do you narrow your target audience?

### Five Ways to Narrow Your Target Audience

You can narrow your target audience using age, ethnicity, gender, geography, political or religious views, current level of support for LGBT issues, and so forth. Whatever criteria you use to narrow your audience, consider the following five things:

**1. Which audience best helps you meet your specific campaign objectives?** Your campaign objectives will determine the target audience. For example, if you want to mobilize the base, only reach out to people who are already supportive. (If someone isn't sure they even support your cause, they sure as heck won't rally for it!)

*“Before taking the Arizona Together television ad public, we showed it to a few donors. They hated it. I said, ‘Good, I hate it too. If we all hate it, it’s probably pretty effective.’”*

*—Representative Kyrsten Sinema, Arizona House of Representatives, former Chair of the Arizona Together campaign*

*The most creative ad campaign in the world isn't going to get a member of Hell's Angels to roll into a biker bar wearing a pastel-colored polo shirt. Similarly, some people will never embrace LGBT issues, no matter how good your campaign.*

On the flip side, if you want to *grow* your base, reach out to fence-sitters and the moveable middle.

- 2. Is this audience persuadable?** The most creative ad campaign in the world isn't going to get a member of Hell's Angels to roll into a biker bar wearing a pastel-colored polo shirt. Similarly, some people will never embrace LGBT issues, no matter how good your campaign. If you target the extreme right, recipients will likely shred your mailer without ever reading it—and you'll have wasted postage and killed a tree. Conversely, a strong supporter may feel great after getting your mailer, but you haven't moved anyone who was undecided. We generally recommend you target the moveable middle, that is, those who don't currently support your issue, but may be persuaded given the right messaging. The moveable middle is also referred to as the “mushy middle,” “greys,” and “independents.” It includes:
- People with moderate political views (about two-thirds of the moveable middle)
  - People aged 35 to 55 (about two-thirds of the moveable middle; youth are generally supportive while older Americans tend to oppose LGBT issues)
  - Women (about two-thirds of the moveable middle)

**Tip: Before you do any form of public communications, clarify your target audience.** Do you want to reach the base or the moveable middle? Remember, communications to member lists won't get you new supporters. Preaching to the choir might feel good, but they're already singing your tune. Unless you're trying to mobilize the base, your money's better spent reaching out to the moveable middle.

- Hispanic audiences (tend to be fairly supportive of LGBT issues, but may be less supportive on marriage)
- Democrats or unaffiliated (fewer are Republican)
- Suburban dwellers

Note that you may need to do a local poll to better define this segment for your particular state or region.

**3. Which segment has the most influence and impact?** Even after you define the best target audience to support your issue, you may still find it's too large for your budget. If you face this predicament, think of easy ways to further narrow the scope. For example, eliminate those who aren't registered to vote (unless, of course, the campaign is a get-out-the-vote effort). At a more nuanced level, consider focusing the campaign on opinion leaders and influencers, such as community leaders, business leaders, or progressive clergy who can "bring others with them" if you win their support.

**4. Can you realistically reach the target audience?** Define your target audience in a way that allows you to actually reach them. While some market research firms like to break the target audience down into psychographic segments, we generally don't recommend this unless you're willing to spend a lot of time and money figuring out how to reach and track them. While it may be interesting to know there's a target audience segment called "shapers" who like to set trends on public issues, this information isn't always practical. For a campaign to be successful, you need to actually reach your target audience as cost-effectively as possible—and that means understanding their demographics and media consumption patterns. If you want to reach 30-year-old men, you might consider an ad in a

car magazine, while to reach college-age women, you might run an ad in *Cosmopolitan*. It's much more difficult, expensive, and time-consuming to figure out how to reach members of a psychographic segment.

**5. Have you applied a ruthless focus?** "No man left behind" does not apply to your target audience. Your target audience should be large enough to make a difference, but small enough that you can influence them. By definition, when you focus on one audience, you ignore another. This is good—corporations do it all the time. You may personally love the new iPod shuffle, but if your grandmother doesn't own a computer and thinks rocking out is a gardening term, she won't give a hooley that the iPod comes in five different colors. The point is that Apple doesn't expect (or even want) its ad campaign to resonate with Grandma. They're willing to sacrifice Grandma to reach 20-something urban hipsters. Reaching one audience effectively means not reaching another.

What creates added pressure for social advocacy groups is that to grow the base, you need to speak to those outside the base. Messages that effectively sway moveable middle voters likely won't resonate with your supporters. In fact, if your base can't relate to your campaign messages, it means you may have it right. That said, we recommend you spend some time helping your supporters understand the reasoning behind your communications approaches. That way, they'll understand why the messages don't resonate with them—and be more invested in the campaign's success.



## Messaging and Creative Development

We can't overstate this (though we're getting awfully close)! Messages need to reach and convince your target audience, not your executive director, your favorite donor, the chair of your board, or your most strident opponent. You need to reach your target audience where they're at, and appeal to their deeply held values, using language they can relate to (see *The Art and Science of Framing an Issue*).

### If You Can't Test It, Don't Run It

Non-profits often argue that they can't afford to test their messages. We argue that they can't afford not to. It's like buying a car and forgoing insurance. If you have the money to run a campaign, spend the money to ensure it'll be effective. If your budget is thinner than single-ply toilet paper, even a quick-and-dirty test is better than nothing. If you have to, run your ad by your brother-in-law (not the one who loves you, but the one who looks a little nervous whenever you drop by). Alternatively, knock on the doors of a few neighbors, or show your creative to random strangers at the local shopping mall. Even these basic techniques can help you identify red flags and fine-tune your message. See "*Creative Testing*" for more information on how to do this.

### Messaging and Creative Should Be Based on Research

We're not fans of the *Martha Stewart Living* magazine. And we'd rather have a root canal than spend our holidays weaving homemade wreaths from common household scraps. But Martha Stewart loyalists would cancel their subscriptions in droves if the magazine suddenly started looking like *Harpers*, one of our favorites. Why? Because we just stopped speaking the language Martha's fans care about.

If you're talking to people who aren't like you, you'll be more effective in reaching them if you can speak their language. You believe in your cause, but as part of your campaign, you'll be talking to people who don't (yet) believe in it. Put simply, you'll be talking to people who don't think like you do.

No matter how well you believe you know your target audience, the reality is that they know themselves better. That's why campaign messages based on research are invariably more successful than those developed by intuition. Your intuition may be

*Messages need to reach and convince your target audience, not your executive director, your favorite donor, the chair of your board, or your most strident opponent.*

*"Those campaigns in which the group has predetermined a message are usually doomed to failure."*

—*Foundation Center, 2004.*

reliable when it comes to you, but it's less reliable when it comes to someone else. Effective messaging requires that you:

- Research how the target audience thinks and why
- Devise messages based on the research
- Test the messages to ensure they work

### Six Steps to Effective Messaging and Creative

1. **Use qualitative research to understand the target audience.** At the preliminary stage of message development, it's more important to understand *how* people think than to understand their level of support for your issue. How do they talk about your issue? What metaphors and patterns of reasoning do they use? What connections do they form to other issues? What language or words trigger defensive reactions? Clues may come from what's omitted and moments of inconsistency.

Note that learning *how* people think about your issue requires qualitative, not quantitative, research. While polls help you understand levels of support, pinpoint your target audience, and identify reactions to specific messages, polls

**Tip: Start by reviewing existing market and opinion research.** You can learn a lot by watching the focus group videos or reviewing the polling data of like-minded organizations. Supplement existing research with your own focus groups, or, if you can't afford those, conduct some one-on-one interviews. This will help you gear the research to your particular issue, target audience, or geography.

won't help you understand the subtleties of what your target audience believes, why they believe it, and how they talk about it.

- 2. Develop messages for testing.** Based on your research, develop messages for testing. This is your time to experiment. Don't test five variations of a similar message; instead, develop different messages and see what works. For example, let's say you want to convince others to care about global warming. One approach might ask people to take responsibility for the world they leave their grandchildren. Another approach might showcase the consequences of global warming on the natural world. Appealing to posterity is a very different approach than showing photos of melting ice caps and starving polar bears. Once you determine which approach is more effective, you can start to fine-tune the specific language, imagery and delivery of your message.

Some questions to ask when drafting a message are:

- What are you asking people to do, think, or feel as a result of the campaign?
- Does the message appeal to the deeply held values of the target audience without triggering an opposing frame?
- Is the message appropriate, given the education, perspective, and values held by your target audience?

### Six Steps to Effective Messaging and Creative

1. Use qualitative research to understand the target audience

2. Develop messages for testing

3. Test the messages

4. Refine the messages and develop the creative

5. Test the creative (qualitatively)

6. Refine and finalize

- Are the messages based on what you know about the opinions of your target audience?
- How will your messages stand up to confrontation and criticism?

- 3. Test the messages.** Effective messaging isn't about wanting to say something and then just simply saying it; it's about knowing what you want your messages to do (e.g., get people to vote a certain way), and then figuring out what you need to say to make that happen. This takes research, not intuition. The only way to know if your messages will do what you need them to do is to test them.

You can test your messages qualitatively or quantitatively. While qualitative message testing gives you insight into how people respond to your messages and why, it doesn't give you any assurance that your broader target audience will respond in the same way. If you want quantitative data (i.e., data that's statistically valid) you can use polling to test different wording and have respondents rate whether or not it's compelling. For more information see *Qualitative Research* and *Quantitative Research* in this toolkit.

- 4. Refine the messages and develop the creative.** Use your message testing results to develop your final messages. Now it's a matter of fine-tuning and creative execution. At this stage, you know what you're going to say. Now it's a matter of how exactly you'll say it. In an ideal world, you'd develop different versions of the creative and do one last round of testing.
- 5. Test the creative (qualitatively).** Before finalizing the creative, test the complete package, including imagery, text, headlines, etc. The creative testing can take different forms depending on your budget. You can test storyboards, mock-ups, or even "finished" ads (see *Creative Testing*). If you have an adequate budget, start by testing different ad concepts. Then, refine the winning concept to understand how changing certain elements will impact the ad's effectiveness. For example, two ads with the same copy and layout, but with different background imagery, could impact the same audience totally differently. Look to understand how people respond to different headlines, words, and images. Again, use the brother-in-law test if you don't have a budget for anything else.

- 6. Refine and finalize.** Fine-tune and finalize the creative that most successfully moved the target audience.

### Stay on Message!

Once you've figured out your message, stay on it! This requires discipline. It's easy to be pulled off message by current events, bad press coverage, baiting by opponents, or supporters who want wording that resonates with them. The public may enjoy the mud-slinging between Rosie O'Donnell and Donald Trump, but if you start throwing mud pies at your opponents, the focus will be on the mud, not the campaign message. Good messaging means repeating the same message over and over. See "*Interviewing Like A Pro*" for concrete examples of how to stay on message when your opponents or the media try to knock you off.

*"Language use is a science. [It] is also a discipline. In many [Republican] offices there is a pizza fund. Every time you use the "wrong" language, you have to put a quarter in the pizza fund. People quickly learn to say tax relief or partial-birth abortion, not something else."*

—George Lakoff, *Don't Think of an Elephant*



### CASE STUDY: FRANK LUNTZ, REPUBLICAN POLLSTER

The effective messaging of the political right has been a source of both admiration and frustration in progressive circles. One pollster, Frank Luntz, was particularly influential in guiding Republican messaging in the 2004 election. Frank Luntz's messaging playbook, *Language of the 21st Century*, provided conservatives with ready-made messaging for use across a range of issues, from health care to the U.S. budget to affirmative action. In order to figure out what worked, Frank Luntz made a massive investment in qualitative research, conducting more than 200 focus groups! He probed for values, fears, hopes, and dreams, going far beyond previous telephone polls. For example, traditional phone surveys typically found that the economy and national security are a few of "the most important problems facing America today." However, deeper probing found that the real issues people worry about are much more personal. They include "the disintegration of morality in society," "the breakup of the family," and "the declining quality of life." These three worries appear to explain the fundamental motivation of more than 80% of Americans, though only 2% to 3% of telephone survey respondents identify them directly.

Luntz's findings had a huge impact on conservative messaging. He recommended that conservatives embrace an agenda that addressed the "moral crisis" Americans felt by focusing on faith, family, and community. Even issues like crime were cast in terms of individual responsibility and moral accountability. This messaging shift helped Republicans win the 2004 election.

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## Market Research Overview

### Why You Should Understand Market Research

Even if you never plan to commission original market research, it's still useful to have a baseline idea of what's involved. Market research surrounds us. News stories feature the latest public opinion figures. Advocates and political operatives perform polls and focus groups and use them to inform their strategy.

Market researchers and political pollsters generally present their information as fact, but beware: "Facts" can range in credibility. You may hear that four out of five dentists recommend Chewaliscious Bubblegum to help fight cavities. However, if only five dentists were surveyed, and four of them own shares in Chewaliscious, the findings hardly represent the truth—even if the data itself is accurate. If 80% of respondents give high approval ratings to the president, it makes a difference if we understand who was polled. Were they drawn from a major Republican donor list or taken randomly from the general population?

If you're paying for research, it's even more important to understand what you're getting. There are a lot of market research and political polling firms, but that doesn't mean all of them are good. If research is performed poorly, it can be worse than not doing it at all. Now, not only do you have bad data, but you may go off in the wrong direction believing you've done the work to ensure the facts are on your side.

### Hiring a Good Market Research or Political Polling Firm

If you're launching a general communications campaign, a good market research firm should be able to help you. However, if you're fighting a specific political battle or ballot initiative, an experienced political pollster will likely be a better fit. In either case, finding a good research firm can be a challenge. Start by contacting organizations you feel have launched impressive campaigns in the past and finding out who they used. Note that research firms work across many issues, so feel free to call organizations in other advocacy areas such as the environmental or women's movement, or even your state political party. Ask for the organization's communications director who can likely put you in touch with the person in charge of their research.

If you want to conduct local or state-based research, contact local or state groups for a recommendation. If you want to do national research, contact national groups. You can also find reputable market research firms through sources such as the American Association of Political Consultants or the Ballot Initiative Strategy Center. You might also consider hiring an independent research consultant. This person wouldn't perform the actual research, but would be in charge of hiring and managing the process.



Get proposals from at least three firms. A firm's response to the proposal process will give you an idea of how easy the firm is to work with, its people, its recommended research approaches, and price ranges. When choosing a firm, base your decision on the following:

- **Experience.** Corporate work and even general non-profit work differs from political or social advocacy work. Does the firm have experience in advocacy or political research? Do you like the work they've done for past clients? If it's a political polling firm, how successful is it? Can the firm competently execute large public opinion polls—or does it rely on do-it-yourself software like Zoomerang or Survey Monkey?
- **Reputation and credibility in the field.** This is especially important if you want your research to influence journalists and/or politicians. If this is the case, use a polling firm that politicians and journalists know and respect (though note that some firms like Gallup will charge more if you use their name when publicizing results).

- **People.** Get a sense of the qualifications, experience, consulting skills, natural curiosity, and creativity of the individuals assigned to your project. Find out who will be working on your project and what their roles and responsibilities will be. Know your main point of contact. Make sure the A-team on the proposal isn't replaced by a less experienced team to do the actual work.
- **Client relationships.** Request a client reference list and call a couple of clients. Ask them questions such as how long they've worked with the research firm, how satisfied they are with the firm, the firm's strengths and weaknesses, and whether they have any reservations in recommending the firm.
- **Proposal.** Review the firm's proposal. Does it understand the goals of the project? What is the firm's plan for gathering information and communicating results? How qualified is its staff? What's the proposed timing and cost?

## Market Research Basics

There are two basic ways to do market research: qualitative and quantitative. Qualitative research helps you understand the attitudes and behaviors of your target audience, while quantitative research measures these attitudes in a statistically reliable way. If you're a people person, you'll probably prefer qualitative research, but if your best friend is your computer, you'll likely favor quantitative research. Good market research generally relies on both. Quantitative research might show you that there's a 50% increase in the number of drivers who speed on Thursdays. However, unless you pull someone over and talk to them (qualitative research), you won't know that on Thursdays, it's free-chicken-wings-while-they-last at the local pub.

The chart on the following page describes the differences between qualitative and quantitative research.





## Qualitative vs. Quantitative Research Overview

	Qualitative Research	Quantitative Research
<b>When to use it</b>	<ul style="list-style-type: none"> <li>To understand <i>how</i> people think (e.g., patterns of reasoning, connections to other issues, private or unconscious feelings and emotions, core values)</li> </ul>	<ul style="list-style-type: none"> <li>To develop statistical information on <i>what</i> people think</li> <li>Typically used to answer “how much” in absolute or relative terms (e.g., how much support do we have for this ballot initiative?; how much does this message affect people’s opinions?)</li> </ul>
<b>Most common uses</b>	<ul style="list-style-type: none"> <li>To understand the target audience mindset for development of messages</li> <li>To test reactions to messaging and creative</li> <li>Used before quantitative research to help fine-tune the survey questions</li> <li>Used after a survey to dig deeper into the results (e.g., why people have answered in certain ways)</li> </ul>	<ul style="list-style-type: none"> <li>To understand the level of support for a key issue</li> <li>To test messages at a statistically valid level (helps understand <i>if</i> the message is effective without insight as to <i>why</i>)</li> <li>To track trends over time (i.e., longitudinal studies)</li> <li>To influence politicians (by showing levels of support)</li> <li>To track campaign effectiveness (e.g., tracking attitudes pre, during, and after a campaign)</li> </ul>
<b>How it works</b>	<ul style="list-style-type: none"> <li>Research participants are deliberately selected based on certain desired characteristics</li> <li>Methods use direct interaction and conversation, usually in the form of open-ended questions designed to help researchers understand how people think and reason about a topic</li> <li>Because the format is often very conversational, analysis is subjective, and the results may vary greatly depending upon who conducts the research</li> <li>Methodology can include techniques like word association, sentence completion, role playing, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Research participants are selected randomly and asked to answer questions that have discrete answers or fall on a numerical scale (e.g., “How would you rate President Bush’s performance on a scale of 1 to 5, with 1 being “very good” and 5 being “very poor?”)</li> <li>Usually done by telephone, though may also be done through paper surveys or the Internet</li> <li>Any researcher should be able to duplicate the survey with similar results (that is, results within the margin of error)</li> </ul>
<b>Main types</b>	<ul style="list-style-type: none"> <li>One-on-one interviews</li> <li>Focus groups</li> </ul>	<ul style="list-style-type: none"> <li>Survey/questionnaire administered via telephone, online, in person, or via mail</li> <li>How a survey is administered depends on the survey goals and objectives (e.g. mail surveys have much more limited use than phone surveys)</li> </ul>
<b>Drawbacks</b>	<ul style="list-style-type: none"> <li>Because of the low number of respondents involved, it cannot be used to generalize to the larger target population</li> <li>Subjective and unstructured; also subject to “group think” and unintentional influence by the moderator or interviewer</li> <li>Data collection and analysis may be labor intensive and time-consuming</li> <li>May not be effective for certain types of research (e.g., hostile political ads can have a “sleeper effect” where ads test poorly immediately after being shown, but are effective in changing public opinion over time)</li> </ul>	<ul style="list-style-type: none"> <li>It takes human behavior out of context and ignores the effects of variables that haven’t been included in the research questions—it tells you “how much” but not “why”</li> <li>Results are limited by the questionnaire design (e.g., respondents answer the questions they’re asked, but aren’t able to expand on their answers or provide additional insight/rationale)</li> <li>Polling and other large surveys can be costly</li> </ul>

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## Qualitative Market Research

If you're a foreign aid health worker, it's handy to know that 63% of people in a certain region don't boil their water. But if you want to change this behavior, you also need to know *why* they don't boil their water. Do they understand that unboiled water leads to sickness? Do they have enough fuel to boil water? Does superstition or tradition go against boiling water? If you keep talking about cholera but the problem is a lack of firewood, you won't get too far.

Qualitative research helps you understand what underlies public opinion and behavior. Once you know how your target audience thinks, feels, and behaves—and why—you can better develop messages that are effective in creating the change you want. Before doing qualitative research, answer the following:

- What are your research goals?
- What do you want to learn?
- What questions will you ask?
- Who's your target audience? (Who will you talk to?)
- What research methodology will you use—focus groups, one-on-one interviews, a combination?

### In-Depth Interviews

The two most common forms of qualitative research are focus groups and one-on-one interviews. One-on-one interviews provide the deepest insights about how people think. Imagine being asked to give your opinion on the war in Iraq. A poll asks you to choose between a few preset responses (support/do not support). A focus group gives you more freedom—you can state your opinion and offer brief rationale. However, you'll also hear the opinion of several others in the room, which might influence your responses, or at least, reduce your chance to expand on your thoughts. In a one-on-one interview, you can volunteer detailed (and unsolicited) information that gives deeper insight into how you think and feel. You might mention that your brother, a Vietnam vet, never received adequate medical care after being injured, a fact that greatly contributed to your negative view of military leadership.

Interviews allow a detailed, in-depth, and honest exploration of a topic, and there's no social pressure to conform to group dynamics. On the down-side, interviews can be time consuming and responses can be difficult to interpret. They also trade depth for breadth. Research done with so few respondents makes it hard to know whether the findings can be extended to the general population.

In-depth interviews typically last between 30 and 90 minutes. Most are one-on-one discussions, but interviews can also be performed in twos or threes. Ideally, a professional interviewer leads the discussion. The interviewer should be trained in building rapport with the interviewee, appearing unbiased, and uncovering hidden issues.

### Focus Groups

Focus groups are loosely structured interactive group discussions led by a trained moderator who encourages the free flow of ideas. Many market research firms run large discussions with 10 or more participants, however, we recommend limiting groups to 6 or 8 participants when possible. Smaller groups give everyone a chance to participate without the discussion becoming unwieldy.



Focus groups help you understand how people interact around an issue. And while participants may not be as honest in a focus group as in one-on-one interviews, the group dynamics can really take the discussion in new directions, helping you cover the issue thoroughly. Focus groups usually last between 90 and 120 minutes. They should ideally be held at a focus group facility where you can sit behind a one-way mirror and watch and listen. Focus groups are usually recorded on video.

### Five Deadly Focus Group Mistakes

**Mixing apples and oranges (focus group composition).** The composition of participants makes or breaks a focus group. Generally speaking, people in focus groups should feel comfortable discussing the issue at hand with the others in the group. Imagine having a frank conversation about sex with a group of at-risk teenagers. Now imagine that same conversation, but with the parents sitting in the back of the room. Group composition absolutely affects what people say.

As a general rule, put people with similar beliefs and/or demographics in the same focus group. Separate the moveable middle from opponents. Jerry Springer might boost ratings by inviting Klan members to share their viewpoints with civil rights activists, but you'll need new furniture if you follow suit. If you need to know what a certain sub-segment (such as African Americans) thinks, run an additional group made up of African Americans. Ensure the moderator also reflects the group demographics. On rare occasions, you may want to put dissimilar people together to test general public reactions and/or group interactions. In all cases, the moderator should fit seamlessly into the group.

**Assuming bigger is better (focus group size).** A group of more than eight people gets unwieldy. In order to control large groups, the moderator has to shorten response time and forego follow-up questions—which ends up defeating much of the purpose of having a focus group in the first place.

**Leading the witness (getting honest responses).** Let's go back to your opinions on the war in Iraq. Imagine you're a focus group participant and the moderator is wearing a tie-dye T-shirt with a peace symbol. Or conversely, imagine the moderator is a decorated five-star general. You might be worried about offending

*The composition of participants makes or breaks a focus group.*



*A single dominant voice can take over the discussion and quickly spoil your focus group.*

the moderator, or you might vow that you're not going to let the moderator intimidate you, but either way, you've just changed the dynamics of the conversation.

People will speak more freely and honestly when the facilitator appears unbiased. A good moderator will seem entirely neutral and won't try to influence the discussion in any way. Ideally, focus group participants shouldn't be able to guess where the moderator stands on an issue. The minute the moderator appears to take sides, he or she compromises the integrity of the group.

Not inadvertently leading the focus group participants also means not making any assumptions. If the moderator doesn't understand what a participant is saying, he or she will ask them to restate their response. A good moderator sticks to neutral, clarifying questions. "You're shaking your head. What're you thinking?" is a fine question. "You're shaking your head. Are you thinking this is the dumbest thing you've every heard?" is not.

**Rotten apples (dealing with dominant participants).** A single dominant voice can take over the discussion and quickly spoil your focus group. A good moderator closely controls the group dynamic, keeping everyone involved using special techniques, such as asking for responses from all participants in rotating order.

To avoid “group think” or the influence of a dominant voice, a moderator may also ask people to first write down and then discuss their responses.

**No, a robot couldn’t do this (using professionals).** The outcome of a focus group reflects the quality of the moderator. Good focus groups require professionals. The moderator must cover the questions and topic at hand while making the group feel comfortable. He or she is creative and analytical, and employs exceptional listening skills. Moreover, a good moderator can handle and diffuse difficult personalities.

It also takes expertise to compile and analyze focus group results. Focus group comments can be tough to decipher. Experienced researchers examine more than what’s said. They also interpret facial expressions, body language, and group dynamics. Ideally, they should be behavioral scientists or experts in sociology.

### Elicitation Techniques

Most focus groups and interviews rely on the good old, proven method of asking participants to respond to, and discuss, various questions. However, there are various techniques for taking the discussion deeper:

- **Laddering** starts with broad, “safe and easy” questions before narrowing in on internal attitudes and feelings.
- **Hidden issue questioning** concentrates on deeply felt personal concerns and pet peeves.
- **Metaphor elicitation** asks participants to use pictures, images, and symbols as metaphors to describe how they feel about an issue or subject.
- **Projective techniques** use unstructured prompts, encouraging participants to project their underlying beliefs, attitudes, or feelings onto an ambiguous situation. Examples include word associations, sentence completion, and even story completion (where respondents provide the ending to a half-told story).
- **Third-person technique** uses visual or verbal clues to describe a hypothetical person’s situation, then asks participants to guess the attitudes and/or feelings of that person. Researchers believe that when participants can talk in the third person, they’re less likely to feel pressured into giving standard, or politically correct, responses.
- **Role-playing** asks participants to play out a hypothetical situation or character with the moderator.

### A Note about Online Research

Many research firms are experimenting with virtual focus groups. This is when a research firm conducts an online discussion with participants responding to images, stories, or data from their computer off-site.

Virtual focus groups let you talk to large, geographically diverse groups without the cost and logistical headaches of in-person groups. They come with limitations, of course. Virtual focus groups that require that you recruit only computer-savvy participants. They should be shorter than in-person groups since it can be harder to keep the focus of virtual participants. There is generally less group interaction and written responses may be shorter and less nuanced than verbal responses. And, online moderators often find virtual groups more difficult to control since they can’t take cues from participants’ body language or tone of voice. This fact also inhibits the person analyzing the data.

On the other hand, virtual focus groups allow participants to speak more freely, so they tend to give richer, more honest responses than they would in an ordinary, in-person focus group.

### Limitations of Qualitative Research

Two things highly impact qualitative research: The team doing the research and the participants in the focus groups or interviews. Two moderators can elicit very different reactions from the same set of focus group participants. Alternatively, a few strong participants can sway the outcome of a focus group one way or another. Qualitative research provides great insights into how people think, but they’re not always an accurate reflection of the views of the larger population.



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## Quantitative Market Research

Imagine the mayor of Flanders gets an irate call from a citizen who believes the town's mosquito-spraying program is killing local birds. This particular mayor doesn't really care about birds, but he does care about reelection. The phone call lets him know that he might lose this one citizen's vote if he doesn't respond—but what he really needs to know is how many total votes he might lose. Given a choice, do citizens of Flanders care more about healthy birds or dead mosquitoes?

Use quantitative research when you want statistical information on what a group of people think (e.g., what percentage of people support the current mosquito spraying program?). While quantitative research is more scientific than qualitative research, it takes expertise to execute correctly. Any number of errors can lead to inaccurate results. As with qualitative research, hiring a professional, experienced market research team helps you get reliable results.

Before launching a poll, you should be able to answer the following questions:

- What are your overall goals?
- What do you want to learn from the research? (Agreeing on survey objectives is paramount. Everyone should be very clear on what the survey will, and will not, tell you).
- Who will you survey, and how many?
- How will you conduct the survey—by phone, via the Internet, or a combination?
- What do you want to ask? (Pretest the questionnaire before finalizing!)

### Sample Selection

Once you've outlined your objectives, you need to know *who* you're going to survey. This is a more complex problem than it sounds.

**Selecting the target population.** The target population should match your survey objectives. Take our mayor of Flanders. He only cares about reelection, so he should only survey people eligible to vote. He might narrow the sample further to likely voters—those with a track record of voting. Your target audience can vary widely depending on your overall campaign goals. For example, if you want to use a survey to pretest campaign messages, keep your survey sample

*Any number of errors can lead to inaccurate results. As with qualitative research, hiring a professional, experienced market research team helps you get reliable results.*

to those you intend to target in the campaign. On the other hand, if you want to understand which subsets of the population most support your issue, survey a broad segment of the population. You can narrow your target audience by factors such as geography, political affiliation, gender, age, ethnicity, etc. See "**Target Audience**" for an in-depth discussion on choosing a target audience for a campaign.

**Representation.** For a poll to accurately represent the views of the larger population, it must first and foremost draw randomly from that population. If our mayor of Flanders only surveyed those who recently bought bird feeders, he'd likely get a very different response than if he only surveyed those who recently bought electronic mosquito catchers.

Second, each member of the population should have an equal chance to respond to your survey. If your phone survey targets 25-to 40-year-old women, plan on calling at various times of the day to catch women working both in and out of the home.

Third, ensure a proper cross-section of the population by taking extra steps to include hard-to-reach people. Let's assume it's difficult to get young adults on the phone. However, if young adults make up 20% of your target population, they should make up 20% of your survey respondents. This may mean adjusting your methodology to specifically reach young adults (e.g., targeting additional phone calls to young adults to ensure adequate response rates).



Finally, avoid certain survey methodologies. Automated surveys, or “robo-polling,” don’t provide good data because they can’t deliver a good cross-section of your population. They’re limited to whoever answers the phone and takes time to respond. Also, never use survey methodologies that rely on volunteers to self-select. People who self-select to take surveys by calling 1-900 numbers, or clicking on website banner ads, are likely to be different from those who don’t.

**Adequate size.** A good research firm will tell you how big your sample size should be to ensure a reasonably accurate representation of the population you’re studying. Professional researchers often talk about this in terms of “margin of error” and “confidence intervals.” You may come across the following:

*“A recent poll showed that 56% of respondents prefer fried chicken, while 44% of respondents prefer fried steak. This poll has a confidence interval of 95% with a margin of error of plus or minus three percentage points.”*

What this means is that you have a 95% chance of getting the same results (plus or minus three percentage points) if you repeat the study. In other words, there’s a 95% chance that in a second survey, 53% to 59% of people (56% of people plus and minus three percentage points) would say they prefer fried chicken. However, at a 95% confidence interval, one in 20 surveys (or 5%) will produce results outside the predicted range. This means there’s a 5% chance that your survey is one of the 1 in 20 surveys that has results outside of the predicted range.

Published survey results often mention the margin of error but not the confidence interval. The default confidence interval used by most polling firms is 95%, which is normally achieved with a sample size of 400 people. A bigger sample size means a higher confidence interval and increased accuracy; the smaller the sample, the lower the confidence interval and accuracy. But higher survey accuracy can dramatically increase your costs. A good research firm will help you make reasonable trade-offs between accuracy and cost.

Note that margin of error isn’t the only source of error in surveys. Improper sampling methodology, poor interviewer technique, and unclear questions can all affect your results. Again, get a good research or polling firm to appropriately manage all these elements.

*Social pressure, confusion over questions, and inadequacy of provided answers can all compromise your survey. A good survey design pays careful attention to wording, word order, questionnaire length and format, and unintended sources of bias or error.*

**Oversampling.** Do you need information on a specific sub-population? Then you may need to “oversample” that sub-population. This means talking to enough people in that sub-group to make your data reasonably reliable.

Let’s say you want to do a broad state survey on a land preservation bill and you’re particularly interested in what Native Americans think. If Native Americans represent 3% of the state population, and you have a sample size of 500, you’ll only talk to about 15 Native Americans. This is too small a sample to draw reliable conclusions about the opinions of Native Americans. You’ll need to deliberately supplement your random population sample with additional Native American respondents—hence the term oversample.

### Survey Design

As if getting the sample right isn’t hard enough, consider the impact that survey design and wording have on results. For example, social pressure, confusion over questions, and inadequacy of provided answers can all compromise your survey. A good survey design pays careful attention to wording, word order, questionnaire length and format, and unintended sources of bias or error. A trusted research firm should take care of this for you. However, if you understand what makes a good survey, you’ll also be able to interpret third-party surveys.

**Speak the language of your audience.** Write the survey to match the language of the target population. This includes colloquialisms as well as using native-language interviewers for non-English speaking ethnic populations.

**Ask clear, non-leading questions.** How questions are asked can greatly affect survey results. “Would you rate the president’s performance as good, average, or poor?” is different than asking, “Do you agree with the 68% of Americans who rate the president’s performance as poor, which, by the way, is the lowest approval rating since Nixon?” Clearly define concepts, phrase questions unambiguously, and carefully



examine your survey for bias. Include “Don’t Know” or “Not Applicable” type responses to all questions, except those where all respondents are certain to have a clear answer. Pretest the survey to make sure that respondents will understand all the questions, and that vague wording won’t interfere with their responses.

**Be careful with survey context.** Many things can influence someone’s response—even a single-minded focus on a specific topic. Let’s say you want to understand support for affirmative action. A survey that clearly focuses on racism and race policy may lead the respondent to answer in a “politically correct” way, skewing the results. You’ll get a more accurate read by throwing an affirmative action question into a mix of other, non-related policy questions on taxation, education, and foreign policy.

**Short is sweet.** Keep the survey as short as possible. More people will complete a shorter questionnaire, regardless of the interviewing method. *If a question isn’t necessary, don’t include it.* Getting people to spend 10 minutes answering questions free of charge is difficult enough. Getting them to do it for 45 minutes is almost impossible.

**End with demographics.** Leave demographic questions (e.g., age, gender, income, education) till the end of the questionnaire. By then, the interviewer should have a rapport with the interviewee, allowing honest responses to personal questions. Exceptions to this rule are any demographic questions needed to qualify someone for survey inclusion. For example, many researchers limit their surveys to people in certain age groups.

## Question Sequencing

Statistical analysis is subject to some hard and fast rules. However, the people providing the data are subject to some pretty weird human behavior. Fortunately, we know this and can adjust for it using survey design techniques such as question sequencing. Question order can affect the results in three ways.

**I can’t get this out of my head (priming).** Don’t bias your survey questions by mentioning an idea or issue that people will still have in the back of their minds while they answer a later question. Consider the following: “Did you hear about the heat wave in New York that killed several senior citizens? Do you support government subsidies for air conditioners in New York?” This will elicit very different responses than “Did you know that air conditioning units are

one of the biggest domestic contributors to greenhouse gases? Do you support government subsidies for air conditioners in New York?”

While this example creates an obvious response bias, some priming effects are less obvious. Asking about the biggest problems facing the nation may affect how respondents later rate the president’s performance. You can try to lessen priming effects by randomizing the order of related questions, or by separating them with unrelated questions. Unfortunately, neither technique completely eliminates the problem.

**Top of the heap (order bias).** The order in which answers are presented can also affect the results. People tend to pick the choices nearest the start of a list when they read the list on paper or a computer screen. People tend to pick the most recent answer when they hear a list of choices read to them. If you’re using phone, computer, or Internet survey methods, good software can help reduce this problem by randomizing the pick list for each interview.

**Mental laziness (habituation).** The other way question order can affect results is by habituation. This applies to a series of questions that all have the same answer choices (e.g., poor, neutral, good, very good). People tend to give the same rote answer to all questions after being asked a series of similar questions. They may only truly think about the first few questions in the list. Again, you can use software to randomize the questions. It won’t eliminate habituation, but it will ensure that habituation applies equally to all questions in a series, not just those at the end of a series.

Another way to reduce this problem is to ask a short series of similar questions, then ask one or more different kinds of questions, and then another short series if needed. You can also change the “positive” answer to reduce habituation. For example, word statements so that agreement sometimes means satisfaction, and sometimes means dissatisfaction (e.g., “I think this country is headed in the right direction,” and “I believe that I am worse off now than I was five years ago”).

*Each question needs to be clear and precise. You want all respondents to interpret each question in exactly the same way.*

## Question Scales

*On a scale of 1 to 73, how satisfied are you with the performance of today's teachers?*

If that took you aback (Does your satisfaction rate 63 or a 64? What's the difference anyway?), you'll know why most surveys use standardized scales. Researchers are divided on how large a scale a survey can safely use, but considerable evidence suggests that anything over five loses relevance. This depends partially on the education level of the respondents. University graduates deal with a 10-point scale just fine, but we recommend limiting your scale to five if you're surveying respondents with less than a high school education.

Scales also have a typical sequence. They normally present agree/disagree choices in that order. When using numerical rating scales, higher numbers should mean a more positive answer.

Lastly, the desire to please translates into a tendency to agree. Statistically, the percentage that strongly *agrees* that "X is good" should exactly equal the percentage that strongly *disagrees* that "X is bad." In the real world, however, it doesn't work that way. Experiments show that more people will agree than disagree.

Try eliminating this problem by asking half your respondents if they agree that "X is good," and the other half if they agree that "X is bad." Then, reverse the answers given by the second group. This is extra work, but it may be worth it if you're after the most accurate reading of those who really agree.

### Clear, Unbiased Questions

Each question needs to be clear and precise. You want all respondents to interpret each question in exactly the same way. Keep questions short to avoid confusion and to take some stress out of the process. Stressed and confused respondents result in bad data. Also, avoid introducing bias into your survey by looking out for the following:

**Double-barreled questions.** Double-barreled questions combine two or more issues into a single question. For example, the LGBT surveys we reviewed commonly included questions such as:

*I may not personally agree with homosexuality, but that doesn't mean I think gay service members should be banned from the military.*



This example requires agreement on two separate things. First, that I'm *uncomfortable* with homosexuality, and second, that I'm comfortable with gay service members serving in the military. What if both don't apply? What if I'm comfortable with both homosexuality and with openly gay service members? Conversely, what if I don't personally agree with homosexuality, and I also think the military should ban gay service members? It would be better to rephrase the question so that all respondents can clearly agree or disagree:

*Regardless of how I personally feel about homosexuality, I don't believe gay service members should be banned from the military.*

Here's a simpler example of a double-barreled question:

*Gays and lesbians should be prevented from marrying and adopting.*

The example above uses one sentence to ask about two different issues (i.e., marriage for gay couples and adoption rights). Each issue may elicit different levels of support, so putting them both in one question will skew results.

**"What part am I answering?" questions.** Especially in message testing, there is temptation to test lengthy ideas or language such as the following:

*Not everyone agrees on marriage for gay couples, but that doesn't mean it should be illegal. The government shouldn't be in the business of regulating what people can and can't do in their private lives. Liberty is a fundamental American value, and not extending that value to gay couples is discrimination, pure and simple.*

**Tip:** If the word “and” or “but” appears in a question, check to verify that it’s NOT a double-barreled question.

*Avoid emotionally charged words or leading questions that encourage a certain answer.*

This type of message testing is generally problematic. It combines at least four different concepts: 1) despite disagreement, marriage for gay couples shouldn’t be illegal, 2) the government shouldn’t regulate our private lives, 3) liberty is fundamental American value, and 4) this situation is discrimination. If the question tests well (or poorly), it’s not clear which concept, or combination of concepts, is driving the response. You can, however, use this type of question when you’ve already independently tested each concept, but you want to find out how well they work when presented together.

#### **Partisan cues and emotionally charged language.**

Avoid emotionally charged words or leading questions that encourage a certain answer. Sometimes charged language can be subtle. “What do you think of the XYZ proposal?” will elicit a different response than “What do you think of the *Republican* XYZ proposal?” Using “Republican” may cause some to favor the proposal and others to oppose it, depending on their feelings about Republicans, not the proposal itself. Certain words create strong reactions in people, regardless of the content of the question.

That said, our concern about emotionally charged language should NOT be applied to message testing. The whole point of message testing is to see if respondents are persuaded by your language or logic. To determine how you should word your message, ask yourself, “What do I want to learn from this question?” If you want to learn what the respondent already thinks, use neutral language. If you want to see how your target audience will react to an emotional augment, testing non-neutral language may be the whole point.

**Leading questions.** A leading question is phrased in a way that suggests that the researcher expects respondents to give a certain answer (e.g., “Don’t you agree that gays and lesbians deserve equal protection under the law?”)

**Double negatives.** When you ask respondents whether they agree with a statement, double negatives can occur. For example:

*Gay service members should be required not to reveal their sexual orientation in the military.*

Do you agree or disagree? If you disagree, you’re saying you don’t think gay service members should be required *not* to reveal their sexual orientation. In other words, you believe that gays and lesbians *should* be required to reveal their sexual orientation. If you’re confused, so is the person answering the survey.

**Answer choices should be mutually exclusive and exhaustive.** Mutually exclusive means there’s no overlap. For example, asking for respondent age with categories 20 to 30 and 30 to 40 puts the respondent in a dilemma if they’re 30 years old. Exhaustive means there’s a category available for all potential responses. When your last age category is 65 to 80, you don’t leave a response for a 90-year-old respondent.

#### **Split Samples**

Some researchers split their samples to understand how word choice affects their survey outcomes. Split samples occur when half of the respondents receive one version of a question, and the other half receives a different version. Researchers often use split samples to test language subtleties. For example, you might ask the same question but substitute the phrase “civil unions” for “domestic partnerships” for half the respondents. If the respondents asked about domestic partnerships respond more favorably than those asked about civil unions, you’ll know which term has more public support. Note however that since you have less people answering each split sample question, you’ll have a higher margin of error for those questions.

#### **Interpreting Results**

Unlike a good detective show, survey results are rarely limited to “just the facts.” “Favorable” answers can be driven by the desire to please or to look like a nice, responsible, compassionate citizen. The desire to “look good” consistently skews pre-election poll results. More people say they’ll vote than actually do. More people say they’ll go to museums or libraries or church than actually do. And more people say they’ll support minority rights than actually vote to protect them. This desire to “look good” can be particularly acute if the survey focuses single-mindedly on one issue. Results from a survey focusing only on the

environment will indicate more support for an environmental protection bill than results from a survey that puts the same bill in the context of a list of other, non-environmental issues. Many polls on LGBT issues suffer from just these types of problems. In fact, on Election Day 2004, voting on anti-gay ballot initiatives was consistently less favorable than predicted by preelection polls. Because there can be a big drop-off between stated support and actual support, many political operatives won't pursue issues that poll at less than 60% support.

### Survey Types

Surveys come in many different flavors. We cover a few of the basic surveys used in communications campaigns.

**Longitudinal survey.** Surveys should be designed to be replicable over time. A longitudinal study measures changes in attitudes and beliefs by asking the same questions at different points in time. Longitudinal studies are particularly useful in determining trends in public opinions or in measuring whether a communications campaign has succeeded in shifting public attitudes.

**Benchmark survey.** A benchmark survey reveals where an audience stands on a particular topic. They're often used in up-front campaign planning and may be helpful for developing messages or defining the target audience. A benchmark survey may include questions on attitudes, values, and reactions to messages. It may also contain demographic and lifestyle questions, and questions on policies and behavior. Benchmark surveys can also serve as the pre-campaign survey (see below), though if possible, it's better to conduct a separate pre-campaign survey immediately before starting your communications.

**Pre- and post-campaign surveys.** Pre- and post-campaign surveys are done directly before a communications campaign rolls out and immediately after it finishes. They ask identical questions about public opinions and attitudes to help determine if the campaign succeeded in shifting public opinion. The post-campaign survey also often asks questions that measure awareness and recall of the campaign. Ideally, the pre- and post-campaign surveys will be compared to the same survey done in a control market that isn't running the campaign. Performing an identical set of surveys in a control market helps you figure out whether public opinion shifted due to your campaign, or whether it shifted due to external factors.

### WHEN IS INTERNET POLLING RELIABLE?

Many market research firms are intrigued by the low cost of Internet polling. It can be effective, but it only results in reliable statistical data when both of the following conditions are met:

- Your target audience excludes those who don't use the Internet. One-third of Americans don't have Internet access, and lower-income and older Americans are less likely to have Internet access, so focusing only on Internet respondents creates sampling errors if you're trying to understand the views of the general public.
- You recruit respondents by phone using random sampling methodology as opposed to asking respondents to self-select (e.g., click on a banner ad to complete a survey).

### Integrating Qualitative and Quantitative Research

Whether you're a "hard numbers" type who prefers to sleep with your calculator or a "soft and fuzzy" type who prefers to sleep with someone who hogs the covers, you'll need to get comfortable with both qualitative and quantitative research to get the complete picture. Historically, social advocates haven't put enough focus on qualitative research. Only 10% of political research dollars go into qualitative research, compared to 70% of consumer research dollars. In other words, social advocates need to prepare to get in touch with their soft and fuzzy side.

A research approach that integrates qualitative and quantitative research works best. However, make sure you hire a research team with expertise in both methods, as the two research types require very different skills. Sometimes, qualitative research is used as a prelude to quantitative research, such as the use of focus groups to help guide the development of polling questions. Alternatively, qualitative research can shed light on quantitative findings (e.g., "That's odd. Why do 53% of people in this town believe in extraterrestrials?") Or, you can use quantitative research to determine the prevalence of qualitative findings (e.g., "People in this focus group kept talking about UFOs. I wonder how many people in this town believe they've seen one?") The best campaigns use qualitative and quantitative research to cross-validate and build on each other's results.

*The desire to “look good” consistently skews pre-election poll results. More people say they’ll vote than actually do. More people say they’ll go to museums or libraries or church than actually do. And more people say they’ll support minority rights than actually vote to protect them.*



*Historically, social advocates haven't put enough focus on qualitative research. Only 10% of political research dollars go into qualitative research, compared to 70% of consumer research dollars.*

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## Creative Testing

You may not feel inspired to hang a velvet Elvis in your living room, but ask yourself this: If nobody's buying them, why are they still making them? Things that make you shudder may be someone else's idea of a living room centerpiece.

Effective creative, like effective messaging, doesn't focus on you. It zeroes in on the people you're trying to reach, who, incidentally, often don't share your sense of style, sense of humor, or sense of social justice. And since there's no accounting for taste, a little bit of money spent up front testing your creative can help ensure that the whole lot of money you spend rolling out your campaign is money well spent. Creative testing gives you insight into how well (or how poorly) your target audience will respond to your campaign. It can, however, be expensive. An experienced market research company can help you make any needed trade-offs.

### Basic Creative Testing

You say po-tay-to, I say po-tah-to. That's okay—as long as we both know we're talking about a starchy vegetable that tastes good with gravy. If you've ever played a game of telephone, you know how quickly communications can disintegrate. You know what you want to say, but do you know how your target audience hears and interprets it?

In its simplest form, creative testing involves showing an ad to members of your target audience and asking them to describe the main point and how they feel about it. Creative testing looks at four things:

1. **Comprehension.** Do people understand the ad in the way it's intended? Is the message clear and easily articulated?
2. **Reaction.** What sort of feelings or attitudes does the ad provoke? Are people moved? Is the ad interesting and relevant? Do people like it? Do they believe it?

*Since there's no accounting for taste, a little bit of money spent up front testing your creative can help ensure that the whole lot of money you spend rolling out your campaign is money well spent.*

3. **Stopping and staying power.** Do people pay attention to the ad? Do they recognize and remember it easily?
4. **Red flags.** Did the ad produce any unintended effects? Did it elicit negative responses or resistance because of language, imagery, tone, wording, etc.?

Some specific techniques used to test audience comprehension and reaction include the following:

- **Narrative playback** asks respondents to recall and articulate the narrative or storyline.
- **Talk-back testing** asks respondents to explain the point of the ad in their own words. This shows how well the ad is understood and how easily your target audience can share the message.
- **Overall reaction** measures how people felt about the ad, including likeability, stimulation or entertainment value, relevance, newsworthiness, uniqueness, and believability.
- **Persuasion** asks whether respondents found the ad compelling and persuasive.
- **Instant response** relies on a computer-based system to measure second-by-second reactions to speeches, advertisements, etc. Respondents continuously turn dials to show how much they like what they're hearing and/or seeing throughout the broadcast.

**Focus groups/interviews.** Focus groups and personal interviews are the two most common forms of creative testing. However, testing can also be done via questionnaires, online, or in mall intercepts where respondents are recruited at a shopping mall.

*True Story:* Life may be like a box of chocolates, but untested creative is a can of worms. While working at an ad agency, one of the authors of this toolkit tested five logos for a client. Three out of twelve respondents said that one of the logos vaguely reminded them of a swastika. The horrified design team immediately pulled the logo, which was meant to look like a computer chip. In LGBT advocacy work, unintended negative effects sometimes include stirring up the “ick” factor, upsetting African American allies with comparisons to the civil rights movement, and inadvertently reinforcing stereotypes about LGBT people as strident, affluent, and unlike other Americans.

To test your creative, show respondents a mock-up of the ad and then ask for their reaction. Qualitative creative testing gives you good insight into how people will react to your ad and why. However, because qualitative testing means small sample sizes, your findings may not represent the attitudes of your overall target audience.

**Quantitative methods.** It's possible (though often expensive) to test creative quantitatively. For example, some firms recruit participants to look at the creative online and then ask them to fill out survey questions. Alternatively, focus groups and interviews can be supplemented by asking participants to fill out quantitative surveys as opposed to simply discussing their reactions.

### What to Test

You need something to show people before you can test your creative. This can range from a storyboard to a finished ad. More finished materials have more accurate testing results, but they're also more expensive to develop. You might test a finished print ad, but not a finished TV commercial. From roughest to most finished, creative materials might include:

- **Storyboards.** These are hand-drawn and give a rough idea of what the final ad might look like. You can supplement them with other media (e.g., a recorded track of music and/or words). Test storyboards with focus groups to obtain very early qualitative results.

**Tip: If you have a small budget, you could test your creative using a central-site intercept survey.**

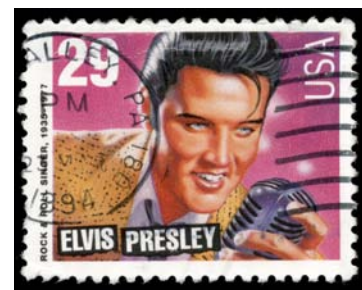
Recruit participants from a public area, such as a shopping mall or busy downtown street. Show them your creative and then ask them to respond to a quick survey. The fast turnaround and high volume of responses makes this method ideal for testing draft executions (i.e., print or television ads prior to production and implementation). When all's said and done, you'll have generated semi-quantitative results. Even though you didn't select your sample randomly, you did use closed-ended questions and tabulate the answers statistically. Use the results to influence your final creative decisions.

- **Roughs.** Prototypes of multimedia campaign ads, roughs have primitive production values. They may include cartoon storyboards set to music or narration, photographic scenes taken from stock footage, or even actual video footage taken from other sources (e.g., finished commercials). Producing roughs isn't cheap, but they can help you get a decent read on ad effectiveness.
- **Finished ads.** Testing an ad in its completed state obviously yields the most valid results. But considering the economics, few campaigns test this type of material.

### Limitations

Creative testing is generally worthwhile. But there are times when it's not effective or when you should take it with a grain of salt. Some limitations that effect creative testing include:

- **Sleeper effect.** Hostile political ads have a "sleeper effect" in that they provoke an immediate negative response toward the attacker, but are highly effective over time.
- **Social norms.** If your topic has poor public support, your ad may perform poorly, even if the execution is excellent. Think of it this way: a dozen professional Elvis impersonators singing "Blue Suede Shoes" would probably not get you to hang that velvet Elvis in your living room. And that's a much easier challenge than moving public opinion on tough social issues.
- **Repetition.** Remember your first cup of coffee? Some things in life are an acquired taste. Unfortunately, this also holds true for advertising. Ads that only reach people once won't change their deeply held beliefs. Hence the limitations of creative testing. Tested ads normally get a single exposure (or at most, two exposures). In the real world, we see ads multiple times. Subtle or complex ads may easily flunk a single-exposure creative test, but do very well on the air.





## Media Planning

There used to be a video booth in Toronto called “The Soap Box.” For a small fee, you could go inside, shut the door, and pontificate for up to five minutes on whatever point you wanted to share with the world. At the end of the day, the person giving the best soap box performance would see themselves broadcast on an obscure public broadcasting station that nobody ever watched. Thus comes the next challenge in any communications campaign: It’s one thing to have something to say, it’s another to be heard.

Effective communications campaigns need a media plan. This part of your campaign outlines how you’ll get your message across. A media plan consists of two elements: The media you pay for and the media you get for free (also called “earned media” or “press relations”). This section focuses on the media you pay for, but keep in mind that effective campaign teams think about using paid media in concert with earned media (see “*Getting Media Coverage*” and “*Press Releases*”).

As with all other elements of a communications campaign, your media plan should link to your overall campaign objective. Before creating a media plan, you need know your target audience, geography, timing (when will the campaign run, is there a deadline such as a vote?), creative mediums (will you have TV ads, radio ads, print ads?), and, of course, budget.

### Creating a Media Plan

Quite simply, a media plan allows you to spend as little money as possible to reach as many members of your target audience as possible, with enough frequency to ensure that your message gets heard. Unless you’ve got a bottomless budget, a media plan requires trade-offs. A good media planner, normally found at advertising agencies or independent media planning firms, juggles these trade-offs for you. All media plans should clarify the following:

1. **Media mix.** What type of media should you purchase? Print, TV, radio?
2. **Media vehicles.** In what specific TV show, radio station, newspaper, magazine, etc., should you place your ad?
3. **Media schedule.** When should you run your ad, how often, and for how long?

We’ll go through each of these in turn.



*Quite simply, a media plan allows you to spend as little money as possible to reach as many members of your target audience as possible, with enough frequency to ensure that your message gets heard.*

### MEDIA PLANNING ON A SHOESTRING

We realize most organizations can’t afford much of the media described in this section. You may be lucky to buy a radio spot—forget about a TV commercial. If you have a limited budget, focus on lower-cost media (e.g., billboards, print ads, local cable programming, direct mail, and earned media). However, even if you’re low on money, most of the traditional media planning principles still apply to non-traditional media. How will you allocate your budget to get repeat exposure? What mix of billboards and local weeklies will give you the coverage you need? How long will your campaign run? Can you reach enough people to make a difference?

**Media mix.** The media mix is the proportion of television, radio, print, and other forms of advertising used in a particular campaign. Figuring out the right mix is part art and part science. Certain media, like television, reach a lot of people, but come at a high price, and budget constraints may rule it out. Other media channels are more flexible and let you hone in on your target audience. For example, if you’re trying to reach women who knit, place ads in magazines focused on textile crafts. Finally, creative constraints might also eliminate one or more media options. If your message

relies on powerful visuals, don't waste money on radio spots. Complicated messages may do better as print ads than TV commercials.

**Media vehicles.** Unlike the term "media channel," which refers to a general type of media outlet, "media vehicle" refers to the specific individual television station, radio station, print advertiser, or outdoor advertiser where your campaign message will run. Media planners choose media vehicles based on how cost-effectively they reach your target audience. However, cost isn't the only factor. KWRT radio may be a great bargain, but if it reaches only 500 total listeners, you won't reach enough people to make a difference. That's why media planners also look at the number of target audience members a vehicle is likely to reach. Regardless of where you place your ad, remember one thing: Marketing research shows that on average, people don't remember an ad unless they see or hear it three or more times. A poor media plan spreads the budget too thin across too many vehicles. You're better off reaching 100,000 people three times than 300,000 people only once. That said, you also don't want to pay to have the same people see your ad 15 times, because that's more repetition than they need.

Some vehicles give you a higher concentration of target audience members. If a television station plans to run a special series on fly fishing, by all means, place your fly-fishing lure ad during the broadcast. You'll reach far more fishing enthusiasts than if your ad runs during *Oprah*. If you're trying to reach the moveable middle, remember that while *Logo* and *The Advocate* may be friendly media vehicles, they almost exclusively target the base.

**Media schedule.** The media schedule outlines when your ad will run and how often. It includes the number of weeks your campaign will be running on each media outlet and the timing of the media spots. The media schedule takes into consideration budget (certain timeslots are more expensive than others), frequency (will the target audience have enough exposure to the ad to remember it?), and reach (are you reaching enough people?). Skillful media planners balance these considerations to help you effectively reach your target audience. Because audiences need repeat exposure to your campaign to remember it, planners typically buy a minimum amount of coverage from each media vehicle. For example, minimum frequencies for magazines are four to six ad placements over a twelve-month period. Radio ads should earn

*If you're trying to reach the moveable middle, remember that while Logo and The Advocate may be friendly media vehicles, they almost exclusively target the base.*

at least 50 gross rating points per week. Most media schedules also take into account "effective reach" (i.e., the percent of the target audience that can be expected to have had an adequate number of repeat exposures to the ad campaign).

### Buying Media

Once you and the media planner agree to a plan, it's time to buy the media. A media buyer (who is often the same person as your media planner) negotiates placement rates based on the expected advertising impressions. They use cost guidelines from past experience or TV and radio cost projections provided by media forecasting companies like SQUAD. Media buys generally fall into two categories: broadcast and print. To understand what you're buying, some basic terminology is helpful.

**Understanding broadcast media buys.** There are two sets of basic terminology for broadcast media. The first defines what you're paying for (how many people are you reaching, how many times, and how significant is this in your market?). The second defines how much you're paying. See the "**Broadcast Media Terms**" chart on the following page for a list of terms.

**Understanding Print Media Terminology.** The bad news is that print media has a different set of terminology from broadcast media. The good news is that it's far less complex. See the "**Print Media Terms**" chart on the following page for a list of terms.

### Post-Buy Analysis (Did You Get Your Money's Worth?)

For most consumer products in America, you buy a fixed quantity for a fixed price. Apples at the super-market cost a dollar per pound, and if you spend a dollar, you'll get one pound. With media buys, the price is fixed but the quantity can vary. It's more like a local farmer's market: Two apples cost a dollar, but it's a crapshoot whether you'll get two big apples or two small ones. You might get a bargain; you might get stiffed; you might get an apple with worms. Let's take a look at what makes media buying and pricing so tricky.

### Broadcast Media Terms (What Are You Paying For?)

Term	Definition	Fictional Example
Share	The percent of households watching television in a particular market that are tuned to a particular show	<i>Lost</i> may have 25% share in the 8:00-9:00 p.m. prime time slot in Denver
Rating	The percent of households with a television in a particular market that are tuned to a particular show (differs from share because rating includes households not watching TV at the time)	While 25% of television viewers may be watching <i>Lost</i> at 8:00 p.m. in Denver, this may only equate to 18% of the population if many people have their TVs turned off because they're out fishing
Gross Rating Points (GRP)	A total measure of ad exposure (a commercial run multiple times during a show counts as multiple times)	If <i>Lost</i> has a rating of 18% but the same commercial runs three times during the one-hour episode, the GRP is $18 \times 3$ , or 46 (gross ratings are duplicated ratings and can exceed 100)
Reach	The number of unique households actually exposed to the ad	If Denver's population is an even 2 million and <i>Lost</i> has a rating of 18%, the reach of the commercial is 360,000 households
Frequency	The average number of times an audience is exposed to an ad over the course of the campaign, or within a specific timeframe (frequency isn't the same as total number of ad placements because not everyone watches each ad)	If, by some media planning mistake, the ad runs only once each on <i>Lost</i> , <i>Heroes</i> , and <i>Ugly Betty</i> , and all three ads are in the same timeslot, the frequency would be one, since target audience members could not watch all three shows at once
Gross Impressions	The sum of all gross audiences of all media vehicles without regard to duplication	Every time a person is exposed to the ad, it counts as a gross impression (if you see the same ad 10 times, that's 10 gross impressions)
Cost Per Thousand (CPM)	Cost of delivering the message to 1,000 households (getting 1,000 gross impressions of the advertisement)	If <i>Lost</i> reaches 360,000 people in Denver and the CPM is \$50, you would pay $360 \times \$50$ for the ad, or \$18,000
Cost Per Point (CPP)	Cost of reaching one percent of the population	If <i>Lost</i> has a rating of 18 in Denver and the CPP of a commercial is \$800, the cost for the spot is \$14,400 ( $\$800 \times 18$ )
Cost Per Unit (CPU)	The cost for purchasing a single ad spot, generally determined by the rating x CPP	What did you end up paying for the <i>Lost</i> ad? In the example above, the CPU is \$14,400

### Print Media Terms (What Are You Paying For?)

Term	Definition	Fictional Example
Circulation	The number of copies of a particular issue that are sold or distributed	<i>Food Lovers</i> magazine has a circulation of 100,000
Audience	Total number of readers of an issue, including pass-alongs	<i>Food Lovers</i> has an audience of 140,000 because it's often read by both partners in a household, and recipes are passed along to friends
Composition	The percentage of the target audience that the publication reaches	55% of <i>Food Lovers</i> readers are women aged 25 to 55
Coverage	The percentage of your target audience that the magazine reaches	An ad placement in <i>Food Lovers</i> Denver will reach an audience of 140,000 people, 55% of whom are women aged 25 to 55, so it reaches 77,000 women; if there are 1 million women aged 22 to 55 in Denver, your coverage is 7.7%
Cost Per Thousand (CPM)	The cost to reach 1,000 people	If the ad costs \$10,000 and reaches 140,000 people, the CPM is \$71.43 ( $\$10,000 \div 140$ )

### Understanding how media pricing is negotiated.

Broadcast media pricing is difficult because you agree to a fixed price for a TV commercial upfront, but you don't have any guarantee how many people will actually see the commercial. Media buyers (who typically charge a commission of 15% on the media they buy) try to predict what an ad is worth by estimating how many people are likely to see it. To do this, they normally look at audience ratings. All other things being equal, buyers value a commercial spot on a show with 1 million viewers more than they do on a show with 500,000 viewers. However, unlike print advertising (where circulation numbers stay consistent), TV viewership can vary widely from week to week. (Just because 1 million people watch *Ugly Betty* this week doesn't mean 1 million people will watch it next week—particularly if it runs during the Super Bowl).

Projecting the viewership of an upcoming television show is something of an art. Media buyers look at the past to try to predict the future. They check viewership history, historical ratings trends, competitive programming situations, on-air staffing changes, and anything else that bears relevance. Based on their estimates of audience size, the media buyer negotiates a fixed

price. The rub is, the actual audience reached by the station at the moment your commercial runs could be higher or lower than estimated. Like buying apples from Farmer Dan, you won't get your money back because you got less than you hoped for. Conversely, you won't pay more if you got more coverage than you hoped for either. However, it's nice to know if you got close to plan and whether or not your media buyer made accurate projections. This requires doing a post-buy analysis.

**Doing a post-buy analysis.** In addition to reporting on whether you got more or fewer viewers than you paid for, a post-buy analysis also checks for worms. Did the schedule run as ordered? Was the reproduction quality good? Do the invoice fees match the agreement?

Audience levels for the overall campaign should average within 10% of projections. Obviously, you don't want to reach far fewer people than projected. But it's also not ideal to reach far more people than projected. Why? Because it means you could have reached your target number of people with fewer media placements, saving money on the media buy. That said, no media planner is perfect. You can expect them to be close, but not dead on.

### Sample Post-Media-Buy Analysis

A post-buy analysis may appear as follows:

- A** Viewership for *ABC News* exceeded expectations, while *Oprah* disappointed. The upshot: *ABC News* provided greater than expected value for the money.
- B** The index of actual vs. projected coverage and costs shows the degree to which something was higher or lower than expected. In this case, actual GRPs for *ABC News* reached 107% of cost expectations. Good media plans should fall within 10% of projections overall (an index of 90 to 110), though individual media placements may vary more than this.
- C** Actual and budgeted cost usually stays the same since the media buyer negotiates the price upfront. However, costs can decrease if spots do not run as planned, as is the case for *Ugly Betty* below.

	Purchased/Contracted			Actual/Achieved			Index of Actual vs. Projections	
	Gross Rating Points	Cost	Cost Per Point	Gross Rating Points	Cost	Cost Per Point	Gross Rating Points	Cost
<i>ABC News</i>	150 <b>A</b>	\$66,750	\$445	160 <b>A</b>	\$66,750	\$417	107 <b>B</b>	100
<i>Oprah</i>	100 <b>A</b>	\$28,800	\$288	90 <b>A</b>	\$28,800	\$320	90	100
<i>Ugly Betty</i>	75	\$22,500	\$300	65	\$19,500	\$300	87	87
			<b>C</b>			<b>C</b>		

### Analysis of Other Media Purchases

Few people conduct post-buy analyses for radio since listenership remains fairly steady. However, you should at least do a worm check (i.e., get a final schedule to ensure that the spots ran as planned, in the approximate timeslots you negotiated).

With print placement, simply monitor execution. Did it run in the size, format, section, etc., as contracted? Was the ad of good quality? Always request tear sheets of the pages that include your ad.

Monitoring outdoor placement is also a matter of execution. Were the posters or billboards maintained? Do the locations conform to the contract?



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## Getting Media Coverage

There's no such thing as a free lunch (or so they say) but you can get free media coverage (sort of).

Technically, free media means you don't pay for advertising. But in reality, free media costs time and effort. It's unlikely that reporters will crawl out of the woodwork to report on your cause if you just sit on your sofa eating bonbons. Hence the term "earned" media.

While you might get some media coverage by parachuting off a tall building in a Spider-Man outfit, the easier way to get coverage is through the strategic use of pitches and press releases. Again, if you can afford it, a good PR firm can really help you get more, and better, earned media coverage.

### Proactive Pitches

When most people think of earned media, they think of press releases. Press releases can be useful—to a point. The "mass blast" techniques of paid newswires produce limited results. How many times has your phone rung off the hook after you distribute a release? How many times has it rung once?

A more effective way to get coverage is to pitch individual reporters with whom you've built a professional relationship. Tailor your communications to the needs and format of each reporter and outlet. Do they like short stories or long ones? If it's TV, do you have a story that will look interesting and engaging when it shows up on the evening news? Before you contact a media outlet, have a reasonably good sense of the reporter you're pitching to. Are they the right person? Will your topic interest them? You should read the publication, watch the show, listen to the host, etc. Be familiar with the outlet's coverage and, most importantly, its audience. If you're making a pitch, check that the reporter has time to speak with you.

So, how do you research a media outlet? Preliminary research varies by type of media.

- **Print.** If the publication has an online archive, search it for past coverage of your specific issue. Then check search engines like Google and Yahoo. Get a sense of who's covered what in the past and use that information when contacting the publication.

- **Television.** Watch a few segments of the news program you're targeting before contacting the producers. That way, you'll have a feel for the style of the show and the on-air personalities. Make sure you have enticing visual hooks.
- **Online.** Online media is usually archived, making it easy to get an overview of a website or blog before reaching out. If contacting a blogger, remember that you'll want to approach him or her with the same professionalism you'd show other journalists, even if the blogger's personality seems informal and familiar to you.
- **Radio.** Spend some time listening to the show you want to contact. Get a feel for the host, the journalistic style, and the general format, and then reach out.

### Building Relationships with Reporters

It's easier to get coverage if you build relationships with key, interested, and sympathetic reporters. Offer yourself as a resource, someone ready to give information, supply quotes, or refer the reporter to other people. Become the reporter's "go-to" organization for LGBT issues, even when the story won't mention your organization. If you don't have answers, help find them. Even if the reporter is doing a feature article on gay bowling leagues, find them someone to talk to. Get reporters to call you first, so you'll be first in line when it matters.

*The "mass blast" techniques of paid newswires produce limited results. How many times has your phone rung off the hook after you distribute a release?*





Call them with compliments on good coverage, not just with complaints on coverage you didn't like. Do this even if the coverage didn't mention your group. Make good-faith efforts to cultivate relationships by holding lunch or coffee meetings. Proactively let reporters know about important events or stories related to your work. Give them a heads-up on a release, or extend an invitation to a press call.

Make sure you tailor your communications to their individual needs. For example, one reporter may prefer faxed press releases, while another might respond better to two-line pitch emails. Good relationships will help you get your story heard and covered.

### Creating the Contact List

The inevitable question arises: which reporters should you target? Be strategic and start with sympathetic reporters who've covered your issues in the past. Build a contact list by mining fee-based directories that publish journalists' names and contacts (e.g., American Journalism Review Newslink, Bacon's MediaSource, Burrellesluce, NewsDirectory.com, New Media Yellow Book, News Voyager, PR Newswire, Radio Station World, Vocus). If you have trouble getting started, contact GLAAD for assistance in gathering press contacts in your region.

*It's easier to get coverage if you build relationships with key, interested, and sympathetic reporters. Offer yourself as a resource, someone ready to give information, supply quotes, or refer the reporter to other people.*

If you build a custom media list in-house, vigilantly update the contact information. You can fail to reach significant media targets because you sent the press release to the wrong reporter, or to one who left the publication. Develop a spreadsheet or contact database with the contact's name, title, phone number, fax, and email address. Where you can, include publication circulation information, past coverage of issues, and a contact history. Note that it's particularly valuable to target the relevant reporters at the major wire services like The Associated Press or Reuters. If you can get a major wire service to cover your issue, the story may be picked up by papers across the country.

Ideally, before you contact a media outlet to pitch a story, have a specific name, or, at the very least, a title and department.

- **Print.** Assignment editors and local/section editors can refer you to the right contact at their print outlet, though you can also start with staff reporters who've covered your issues in the past.
- **Television.** Producers, segment producers, news producers, and assignment editors should be your first contacts. At larger media outlets, you may be sent to several departments before you reach the right person. While they have busy schedules, news producers are always looking for new stories, so even if they can't take

*"In all of your relationships with reporters, adopt a long-term perspective. You should craft your pitch carefully in such a way that—even if the reporter doesn't take you up on your offer this time—you can be confident your next pitch will be read. This helps cultivate your standing as a reliable source."*

—PR Newswire



time to listen when you first make contact, persistence (without being annoying) often pays off in the long run.

- **Online.** Contact web editors, freelance writers, columnists, and bloggers. Many web outlets are more flexible than traditional outlets, so you can suggest stories for immediate publication or outside normal news cycles.
- **Radio.** Producers, segment producers, and operations managers handle pitches and booking requests for talk radio programs.

### Know the News Cycle

Keep the news cycle in mind when contacting any media outlet. Print and television outlets tend to have the most predictable news cycles, while online and radio outlets are more erratic.

- **Print.** Contact daily papers in the morning and no later than 1 p.m. Understand that you may get edged out by breaking news. Weekly publications tend to have more predictable news cycles. Research the publication dates and make contact as soon as a news cycle begins.
- **Television.** TV production cycles, especially for 24-hour news stations, are fairly consistent. Contact programs as far in advance as possible to pitch your story.
- **Online.** Web publications have fluid production cycles, so contact them with story ideas as soon as they break.

- **Radio.** Radio program schedules operate with short lead times. Build relationships with producers to ensure they contact your organization when your issues are covered.

### Not All Coverage Is Good Coverage

Exercise caution when pitching or responding to a right-wing journalist or media outlet. Most will be hostile and can often do more harm than good no matter how well you prepare for the interview or story. We know it's hard to turn down a spot on national television. However, just because you're invited to appear on a shouting-head show doesn't mean you should volunteer to go get shouted at. Pursue coverage that helps you get your message across—not coverage designed to attack you.

Find out who you'll be debating and how they debate. Some conservative media personalities and opponents engage in civilized debates that could be worth your time. Others will simply sling mud till the question isn't *if* any sticks, it's *how much*.

*Exercise caution when pitching or responding to a right-wing journalist or media outlet. Most will be hostile and can often do more harm than good no matter how well you prepare for the interview or story.*

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## Press Releases

The press release is the most basic tool for getting earned media. It should be short, sweet, and to the point. A press release can cover any number of topics, from responding to a major current event to announcing something newsworthy. Be careful about what you deem newsworthy. Your upcoming organizational picnic isn't—unless, of course, your organizational picnic is a nude hotdog roast in front of the state capitol.

Press releases should help reporters write interesting articles with minimal effort on their part. On occasion, media outlets (especially online media) will pick up your press release and publish it with little or no modification. More commonly, journalists use them as a springboard for a larger story. Before you sign off on your next press release, read it from a reporter's perspective. Is it newsworthy? Does it answer all the "w" questions (who, what, when, where, and why)? Does it have a good news hook? Use real-life examples to create human interest and make your press release timely. Finally, make sure it integrates with the messages of your larger campaign.

### Press Release Format

Press releases follow a straightforward format. Take a look at the press releases on the websites of organizations such as HRC or GLAAD. A typical press release includes:

- **Release instructions.** Tell the reader when the information can be released (e.g., "For immediate release" or "for release on February 15, 2008").
- **Headline.** Grab attention with a short, concise headline, ideally under 80 characters. It should transmit the core topics covered in the release, so an editor immediately knows what the story is about.
- **Summary paragraph.** One or two sentences outlining the major points of the release. It should answer the five to six basic questions of Journalism 101: who, what, when, where, how, and why? Note that some press services only receive the headline, summary, and a link to the release. Hence, the summary can make or break your efforts.
- **Body and dateline.** The body of the release begins with a dateline that includes the city, state, and the date of the announcement. The



*If you have more bun than burger, it might not be the right time to do a press release. If your releases aren't newsworthy, no one will pay attention when the time comes to make a valid, big news splash.*

lead sentence contains the most important information in 25 words or less. Don't assume your reader has read your headline or summary paragraph; the lead should stand on its own. Keep your sentences short and introduce new paragraphs every five to six lines. The body copy of the release shouldn't exceed 500 words; write in a direct, straightforward manner. Short and terse is good. Long, drawn-out and superfluous is bad. The body fully describes the issue, event, etc., and should bolster and explain the points made in the lead. Include a quote or two from credible and compelling people. Consider quoting an important ally or public figure instead of your organization's executive director.

- **Further information.** This section tells readers where they can gain further details (e.g., your website).
- **About/organization boilerplate.** Include a standard sentence or two about your organization.
- **Contact.** This usually includes Contact Person, Company Name, Phone, Fax, and URL.

## What Makes a Press Release Good?

It goes without saying (but we're going to say it anyway) that a press release should be well written. Some things to consider:

- **Where's the news in this news release?** If you have more bun than burger, it might not be the right time to do a press release. If your releases aren't newsworthy, no one will pay attention when the time comes to make a valid, big news splash. Sending out press releases for the sake of sending out press releases simply reduces your credibility.
- **Calm down "excited" ED quotes.** If you're compelled to write a quote on behalf of your organization's ED, make it meaningful. A quote should add something new to the body of the release. It's an opportunity to provide insight, not necessarily express boundless joy or frustration.
- **Keep the writing clear, active and grammatically correct.** No one likes to read convoluted, passive-voice sentences. Verbs and an active voice bring your press release to life. Rather than writing "reached an agreement" use "agreed." If you use acronyms, make sure to completely spell out the word or phrase on the first use, followed by the acronym in parentheses.
- **Economy of words.** Use only enough words to tell your story. Avoid using unnecessary adjectives or flowery language. If you can tell your story with fewer words, do so. Wordiness distracts from your story. Keep it concise. Make each word count.
- **Type font.** Choose a font that's simple, clear and easy to read. Some of the most popular ones include Times New Roman, Arial, and Helvetica. Avoid special fonts. If the person receiving your document doesn't have them, your release will look horrible on their screen. If you're sending out press kits that contain longer printed documents, use serif fonts like Times, Garamond, and Palatino.
- **Line spacing.** Leave at least one and a half spaces between lines so the copy is easy to read.

- **Sub-heads.** If the body copy of the release runs long, break it up with subheads. Short, bold-faced phrases can introduce specific areas of information within the narrative while providing a logical progression of ideas.
- **Numbering.** Make sure you number your pages! Include the line-centered word "more" at the bottom of each page, so the reader knows to read further—and let them know they've reached the end of the release with the word "END" or "###" (pound/number signs).

## Submitting a Press Release

For a small fee, you can use a PR service to submit your press release to journalists and news editors at both print and online media outlets. A couple of the better known services are PRWeb and PR Newswire.

## Op-Eds and Letters to the Editor

In addition to submitting press releases, you can get good media coverage by writing letters to the editor and op-eds. Letters to the editor usually offer a rebuttal or support of an event or article. They should be no more than 250 words.

Op-eds are guest opinion pieces of 500 to 800 words that summarize an issue, develop an argument or propose a solution. They can be a terrific tool for getting detailed and sympathetic coverage on your issue. Before submitting an op-ed, look at several weeks of back-issues to understand the format, tone, and topic areas previously published by the newspaper you're targeting.

Newspapers usually publish letters to the editor and op-eds on a daily basis.

## Interviewing Like a Pro

When your media work pays off and you get an interview, you'll need to prepare for it. With the exception of a few taped interviews, most are live and led by an interviewer who most likely won't have the same objectives for the interview that you do. Remember: Not all coverage is good coverage. Depending on the topic and the media personality involved, it may be better to decline an interview request. If it makes sense to accept, here are some tips to ensure your interview goes as smoothly as possible.

### Know What You're Going to Say

Craft your talking points before the interview. Talking points are brief one- or two-sentence answers that articulate your message. When asked a question, be ready to respond with a talking point.

*Ask someone to role-play the types of questions, language, and objections an interviewer might throw your way—especially a hostile interviewer.*



To create your talking points, identify two or three messages you'd like to deliver. Next, distill these into sound-bites (i.e., a succinct, catchy phrase that sums up your position on the issue quickly and effectively). A good sound-bite immediately connects with the audience. Sound-bites are short and catchy, and stay with the audience far better than long or detailed comments.

Your message should fit into one of three categories:

- A personal story
- An affirmative general message
- Facts and data to support your claims

Share personal stories to show how the issue relates to real people. Intellectual points about legislative processes or legal battles may leave your audience cold. However, a personal story about your struggle to adopt or the friend who was unjustly fired will resonate. Be sure to tie the personal story to a broader message. Finally, while facts and figures can add credibility, don't make them the focus. Remember that statistics and numbers aren't nearly as persuasive in changing hearts and minds as concrete examples or messages that resonate with core values.

### Practice Saying It

Have you ever played Whack-A-Mole? Media interviews are similar. Every time you whack your message across, the interviewer pops up with a completely different angle. Even the most seasoned media professionals practice before interviews. Try delivering your messages to friends and colleagues to fine-tune any potential problems. Better yet, speak to your skeptical brother-in-law or someone outside your immediate circle and see how they respond to your messages. If your messages confuse, offend, or take too long to articulate, go back and rework them.

Also, anticipate the angle the interviewer might take. Ask someone to role-play the types of questions, language, and objections an interviewer might throw your way—especially a hostile interviewer. Practice responding to interruptions, provocative questions, and attempts to throw you off message.

### Say It

Successful interviews don't follow ordinary rules of polite conversation. To stay on message, don't feel compelled to answer the question that was asked.

You may need to be more assertive than usual to prevent a talkative host from railroading you. There are several different techniques that you can use. All require some practice before they'll feel natural.

- **Stay on message.** Don't talk about anything unrelated to your message points. Redirect the conversation back to your message whenever the interviewer strays from it. Don't feel obligated to answer the question exactly as it was asked.
- **Say only what you want to say.** Don't ever let someone make you say things you don't want to say, or answer questions you don't want to answer.
- **Correcting misrepresentations and factual errors.** While you want to stick to your talking points as much as possible, don't be afraid to dispel myths or inaccurate information. Simply say, "A lot of people have that misconception but..." You won't put your interviewer or audience on the defensive, since the language acknowledges a misconception and invites them to rethink it.
- **Bridging.** This technique links the question asked to the message you want to convey. Example: "What I really want to talk about is..."
- **Flagging.** Highlight a particular sound-bite to increase its importance. For example: "The most important thing to remember is..."
- **Hooking.** Try to "dangle a hook" that leads the interviewer to the next question. Example: "But that isn't the only important issue..."
- **Don't repeat negative frames.** Never repeat an opponent's loaded or slanted language. Answer the question in the positive, using your message points.
- **Don't nod at everything that's said.** It's natural to nod to denote understanding, but on television, it looks like you're agreeing.
- **Smile.** If the interview lends itself to a smile, flash one once in awhile. It makes you look likeable and sympathetic.
- **Breathe.** Don't forget to breathe. Taking a deep breath while listening to the next question can help you stay focused and calm.

*Don't feel obligated to answer the question exactly as it was asked.*



## Case Study: Marriage Interview

### Situation

You're going on TV to talk about marriage.

### Talking Points

1. "This is about committed couples who want to make a lifelong promise to take care of each other."
2. "Marriage helps people fulfill this promise—emotionally, financially, in sickness, and even in death. It's wrong to stand in the way of giving committed couples the legal benefits they need to take care of each other."

### The Evil Host

You think your host is going to be nice, but suddenly he turns into Lord Voldemort.

#### Host Question

#### Bad Response

#### Good Response

"We're here today to talk about gay marriage. So my question to you is, where is this going to stop? Today it's gay marriage. Are you going to be on my show next year talking about polygamy? Isn't this just part of a larger agenda to erode American values?"

"Of course this isn't about polygamy or some secret gay agenda, this is about..."

"This is about committed couples who want to make a lifelong promise to take care of the person they love. Marriage helps people fulfill that promise—emotionally, financially, in sickness, and even in death..."

*Mistake: repeating your opponent's frame; answering the question he asked*

*Kept to key talking points; substituted a new frame instead of addressing your opponent's frame*

"But homosexuals don't really want to commit to each other, do they? I mean, aren't they pretty promiscuous?"

"Most gay people aren't promiscuous at all, in fact..."

"That's a common misconception, but I've been with my partner Betty, for 17 years. You know, when she was laid off last year, I couldn't even get her on my health insurance plan. Can you imagine not being able to take care of the person you love? That's just wrong. And there are hundreds of thousands of couples like Betty and myself."

*Mistake: repeating your opponent's frame; answering the question he asked*

*Didn't answer question that was asked; kept to key talking points; used personal example*

"Look, it's simple. If you want to marry, marry a man. Why should Americans have to pay the cost of supporting a lifestyle they don't agree with?"

"Americans don't have to pay to support marriage equality, in fact..."

"Marriage is about love and commitment, but it also provides certain legal protections that allow couples to take care of each other emotionally, financially, in sickness, and in health. To say no to marriage is to tell me, no, I don't want you to be able to take care of Betty. I don't want you to be able to get her on your health insurance. I don't want you to be able to visit her in the hospital. I don't want you to be able to provide for her if you die. And that's just wrong."

*Mistake: repeating your opponent's frame; getting off topic with what Americans do and don't have to pay for*

*Substituted a new frame against your opponent's frame; kept to key talking points; used personal example*

"Just yesterday I was watching footage of the gay pride parade last month. There were topless women and men in all sorts of outrageous outfits doing things I can't even repeat on my show. And now you're trying to tell me you have mainstream values?"

"You and I both know that there is a fringe element to every community. Are you telling me that straight men don't ever..."

"We're here today to talk about couples who want to make lifelong commitments to take care of each other, and about why it doesn't make sense to stand in the way of that..."

*Mistake: allowing your opponent to change the topic; attacking straight people (aka the target audience)*

*Bridged question in order to stick to key talking points*

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## Integrating Acts of Protest

Imagine you're walking downtown when you come upon a small group of protestors outside a building. As you walk by they start waving picket signs and hurling abuse. One of the protestors aggressively tries to block a woman from entering the building. Another chains himself to the front door.

If these types of tactics alienate you, you're not alone. In fact, the picture of Randall Terry, the founder of Operation Rescue, was originally attached to an article entitled, "Randall Terry is Driving Vermont Republicans into the Arms of Liberals." In other words, Randall Terry's protests were so extreme and "embarrassing," that even would-be supporters were starting to think twice. Social protests may get media coverage, but they don't always get *good* media coverage.

Here's the rub. All too commonly, advocates believe that this negative reaction only applies to protests from "the other side." It doesn't. When LGBT rights advocates appear militant and conflict-oriented, it can reinforce the idea that LGBT people don't share mainstream values (see *Mindset of the Moveable Middle*). This doesn't apply to all forms of protest, of course. Acts of social protest have their place and can be effective. For example, they can:

- Put pressure on key power holders
- Allow people to engage in a social issue
- Bring awareness to the issue

If you want to integrate social protest into your campaign, consider the following ideas.

**Protests should be nonviolent.** Violence turns people off rather than wins them over. This includes verbal as well as physical violence. For example, engaging in a shouting match makes most people defensive and discourages a change of heart.

**Use extreme forms of protest carefully.** Only extreme situations warrant extreme tactics. For example, it's widely agreed that ACT UP played a significant role in forcing the government to address the AIDS crisis, and that much of its success came through some fairly extreme tactics (such as storming the floor of the New York Stock Exchange). The AIDS crisis needed urgent attention and extreme acts brought that attention. Additionally, the situation was so egregious that the protests didn't seem so out of place by comparison. However, what works in one situation won't necessarily work in

another. It's one thing to protest government inaction when tens of thousands of people are dying of AIDS. It's another to use similar tactics to protest lack of second-parent adoption protections in your state.

**Don't forget the target audience.** Social protest should complement or reinforce your messaging—not work against it. In other words, your messaging should help Americans want to be fair-minded and accepting of LGBT people. Protests that position LGBT people as angry, flagrantly disrespectful, demanding, and belligerent may do the opposite.

### OPERATION RESCUE PROTESTS CREATE BACKLASH

"Operation Rescue... is best known for placing demonstrators in the entrances of abortion clinics to... make it difficult and embarrassing for women to enter the clinic. Operation Rescue certainly arouses public resentment. People... easily sympathize with the clinics, the doctors, and the women who are being harassed. Rescuers become identified with the general lawlessness in our country, or with the disruptiveness of many "rights" organizations. The result is special legal protections for abortionists and more "pro-choice" politicians being elected and appointed to high office. Less dramatic activity may be more effective in the long run."

—John Frame, pro-life supporter and journalist

*"Civil disobedience is more persuasive when enacted in clearly nonviolent/non-threatening ways, and when participants demonstrate not only a willingness to suffer for their beliefs, but also an interest in communicating that suffering to onlookers."*

—Courtney L. Dillard, from *Civil Disobedience: A Case Study in Factors of Effectiveness*, March 2002

One way to illustrate this effect is to think about flag burning. Flag burning has long been a form of protest guaranteed to grab people’s attention. However, the act of flag burning is so incendiary (no pun intended) that the message of the protest (say, ending human rights abuses) is largely ignored because of the audience’s rage at seeing a burning flag. Even those who agree that flag burning should remain a constitutionally protected form of protest still react negatively when someone desecrates a flag. Rather than taking time to consider the issue being protested, public and political response turns to outrage and condemnation of the protestors, who are painted as extreme and radical.

**Protests should be worth the effort.** Earlier in this section we said that protests could put pressure on politicians, garner media coverage, and mobilize the base. Unfortunately, this is becoming less true over time. Politicians, the media, and the public all have protest fatigue. Protests have become so common that they’ve lost much of their power to persuade. Today, few protests get coverage—unless they’re very large, very extreme, or conducted by the rich and famous. Will it take you days to organize a small group to picket city hall? Your efforts might be better spent elsewhere. That said, protests can be an effective political tool if used wisely (e.g., a rally before a key vote). It certainly won’t look good if your opponents are the only ones showing up at the state Capitol. If you do go ahead with a protest, use a media advisory (as opposed to a press release) to let the media know that the event is taking place.

**Sorry, but the icing matters.** On a more mundane level, you’ll get more respect from your target audience if you dress like a professional. Don’t distract a moveable audience by making them focus on your attire rather than on what you’re saying.

*Social protest should complement or reinforce your messaging—not work against it.*



*Will it take you days to organize a small group to picket city hall? Your efforts might be better spent elsewhere.*

## Case Study: Earth First!

“Earth First! built itself on logging protests with people in torn-up jeans carrying an Earth First! banner. However, the community energy dissipated. People didn’t want to be associated with that idiom. It was very frustrating.

In contrast, there is a remarkable group called the Western Endangered Species Alliance (WESA). These are passionate, aggressive activists, but they are strategically savvy, and they are humble, and they want to do what’s going to most help the forest. Fifteen people got arrested, mostly WESA activists, all wearing formal business clothes. A group of elders of the Audubon Society led the charge and what we got out of that was incomparable. Front page press, prime time coverage, that emphasized the community aspect, emphasized the forest, and nowhere did you see the radical image that would distract support from those messages. It really confirmed to me that this sort of thing can be done, if we can get around the need to always have the radical situation.

We need to correct some perceptions and evolve to be more effective.

- First, the idea that “there’s no such thing as bad press.” That’s an old Richard Nixon adage. Didn’t work for him, won’t work for you.
- Second, the idea that nobody’s doing anything, so let’s do something! Then the same five people go climb a tree, or lock down to a bulldozer, or conduct a puke-in. The question that follows the action is, “Did we get press?” instead of the more important question, “Did we get good press?”
- Next, the idea that nobody is keeping score. Whenever something happens such as a disrespectful action or even activists acting self-righteously at the gas station, residents get feedback about it. Mistakes may last for years. I wish like hell that we had not laid siege to the Okanogan National Forest Headquarters in 1988. Since that fateful day, the whole movement in that area has had to work very hard to get past obstacles to alliances and public support. We gave people an excuse to hate us.
- Another observation is that, “It isn’t only what’s in your heart that counts, but your hairstyle.” I know I’m going to get a lot of heat for that, but it’s damn important. We need to find effective messengers, not just effective messages. Most people will respect your message if they believe that you’re respecting them. Why should they listen to you when your appearance tells them (at least they think it does) that you don’t respect them?

Opinion research has found that environmental protests often turn people against our issues because they cannot relate to our persona or tactic, even if they share our concern. We sometimes alienate even our allies. The only way that we are going to make progress on these issues is if everything we do is infused with a spirit of dignity and respect. The audience we need to reach has to be greeted on their own terms. They are receptive to the things we say, but only if we come to them in ways that don’t cause them to close the door in our face before we say it. If we can do that, we can win. But if we get caught up in ourselves and fail to do things right, we will isolate ourselves from the public, and we will lose.

Too much is at stake to allow that.”

—Mitch Friedman, ED of Northwest Ecosystem Alliance, taken from a February 1996 speech addressing the Ancient Forest Activist Conference in Ashland, Oregon

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## Effective Spokespeople

Martha Stewart might be a great spokesperson for a home décor company, but political strategists probably wouldn't recommend using her to represent the Republican view on the immigration debate. Whether you're creating a print ad, putting a quote in a press release, or sending someone to speak on national television, you need to pick the spokesperson who will most effectively get your message across.

Your spokesperson doesn't have to be famous (although that may get you some bonus points), but they do need to be compelling and believable on your issue. Try to develop a pool of spokespersons who can speak to various audiences on various topics. If the story is about a Hispanic family, try to engage a Hispanic spokesperson. If it's about religious views in the south, try to engage a supportive southern pastor. If you need an expert, find an expert. If you want to show how the issue impacts everyday LGBT people, use someone who can share a compelling personal story.

Most organizations feel pressure to put their executive team out front. However, they often do this at the expense of effective messaging. Your executive director may be extremely well-spoken, but they shouldn't do the speaking unless they're the best person to convey your message to your target audience. Your organization can get more coverage—and more compelling coverage—by using the most effective spokespersons possible. Reporters will be more likely to turn to you if the quotes they get help them create a good story. And, as you get more and better coverage, donors will take notice, even if your executive director isn't always front and center.



*Your organization can get more coverage—and more compelling coverage—by using the most effective spokespersons possible.*

### CASE STUDY: SERVICE MEMBERS LEGAL DEFENSE NETWORK

The Service Members Legal Defense Network (SLDN) uses compelling spokespersons to great effect. To fight against Don't Ask Don't Tell (DADT), the organization maintains a database of former gay and lesbian military personnel who it can call on to speak out. These trained spokespersons then speak from their personal experience. Hearing about the harmful affects of DADT from a recently dismissed Arab linguist, or the first serviceman to be injured in Iraq, is compelling. It would be far less effective to use spokespersons who had never set foot in a military uniform.

SLDN also tries to ensure that its trained spokespersons represent a cross-section of ethnicities, military experience, and geographic spread. If a reporter in Kentucky wants to interview someone local, or if a Hispanic newspaper wants to interview someone in Spanish, SLDN consults its database and provides a reference.

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## Setting a Budget

There's an age-old adage, "If you want it done right, do it yourself." Unfortunately, this adage doesn't apply to communications campaigns—unless you're an exceptionally talented individual who can conduct market research, develop creative, chat up reporters, and buy cost-effective media placements all at the same time. Good communications campaigns require professional help and that, in turn, costs money. If you have a small budget, you'll need to keep your campaign small. We recognize that shortcuts come in handy—such as testing the ad with your hostile brother-in-law instead of organizing a half-dozen focus groups. But if you don't even have the money for some quick-and-dirty testing, you should probably skip the campaign. Drastically under-funded campaigns simply end up having no impact. In this case, the money would be better spent elsewhere.

A campaign budget should include funds for message development and testing, creative development and testing, the media buy, some sort of campaign evaluation, and any incidental agency and contractor fees (e.g., a PR consultant). That said, we do have a few tips to help you stretch your budget.

### Six Ways to Stretch Your Budget

1. **Free market research.** Beg and borrow market research from other organizations. Talk to their marketing and research staff. Whatever market research you can get from someone else is market research you don't have to pay for yourself. It might not be perfect, but it's a start.
2. **Free creative.** Beg and borrow messaging and creative from other organizations. If something worked in a state or on an issue that's similar to yours, see if you can adapt it.
3. **Quick and dirty.** Be brave and use quick-and-dirty testing if you have to. Even if you have to stand at the exit of your local grocery store and beg strangers to take a quick look at your print ad, it's better than nothing.
4. **Focus.** Target that target audience. Narrow down your campaign by focusing on a smaller set of people and impact that group as best you can. If you show potential donors that your small campaign made an impact, you can more easily convince them that a large campaign will make a large-scale impact. Don't try to do too much on too little; you'll end up not doing it effectively.
5. **Low-cost media.** Look for lower-cost media vehicles (e.g., blanket the town in billboards and forgo television).
6. **Earned media.** Look for ways to get earned media. Any good media coverage you don't have to pay for helps bolster your campaign. Is there a way to make the campaign itself newsworthy and still get your message across?



*Drastically under-funded campaigns simply end up having no impact. In this case, the money would be better spent elsewhere.*

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## Campaign Evaluation

Flying by the seat of your pants may be a good idea if you're Superman, but it's generally not recommended in professional marketing campaigns. If you can't say whether your campaign worked, you also can't say whether you should run it the same way next time, or even whether it was money well spent. Although many organizations are reluctant to spend money on evaluation, evaluations are a good investment for two reasons. First, you make donors happy if you can demonstrate that your campaign succeeded, thus making them more likely to donate in the future (nothing breeds success like success). Second, even if your campaign wasn't effective, an evaluation allows you to learn and improve, and ultimately, move public opinion on your issue. Better yet, share your learnings with other organizations to improve communications across the LGBT movement.

### Evaluation Principles

Like everything else, tie the campaign evaluation to your objectives. Since objectives generally fall into one of two camps—changing thinking (attitudes, beliefs) or changing behavior (votes, mobilizations)—an evaluation will measure one or the other.

*If you can't say whether your campaign worked, you also can't say whether you should run it the same way next time, or even whether it was money well spent.*

Be realistic about the potential impact of your campaign so you don't set yourself up for failure. In commercial marketing campaigns, attitude shifts of 1% are important, but advocacy campaign funders often want to see attitude shifts of 10% to 30%. You can expect big, well-funded campaigns to do bigger and better things than small campaigns with a limited budget.

Evaluation methodology and performance expectations should be adjusted accordingly. Sometimes simple things like creating a good press list or establishing ongoing professional relationships with key reporters are good measures of success for very small budget efforts.

Ask yourself, did the campaign:

- Advance advocacy goals?
- Change behavior?
- Raise money?

### Measuring the Effectiveness of Your Communications Campaign

Measurement Type	Purpose	Example Measures
<b>Campaign Activities</b>	Measures campaign activities and coverage. Gives an idea of how well the organization stretched its budget, but it doesn't measure whether or not the communication was effective.	<ul style="list-style-type: none"> <li>• How many people did the campaign reach?</li> <li>• What materials and brochures were put out?</li> <li>• What was the value of earned media?</li> <li>• How many media stories were produced?</li> </ul>
<b>Creative Effectiveness</b>	Measures how well people remember the campaign but doesn't measure whether or not it moved public opinion.	<ul style="list-style-type: none"> <li>• How well does the campaign do on measures of aided and unaided recall?</li> <li>• Can people articulate what the campaign was about?</li> <li>• Did the campaign increase awareness of its key issue?</li> </ul>
<b>Outcomes (Behavior and Attitude Change)</b>	Measures whether or not behaviors or attitudes changed as a result of the campaign. Considered the ultimate measure of success but is costly and time-consuming to do properly. Usually requires surveys or polling.	<ul style="list-style-type: none"> <li>• Has there been any change in beliefs, attitudes or social norms?</li> <li>• Has voting behavior changed?</li> <li>• Has policy changed?</li> </ul>

- Build relationships with influential people?
- Reframe the issue?

### Typical Evaluations

Campaign evaluations look at three different types of measures. What did the campaign do (activities, coverage)? How effective was the creative (recall, awareness)? And, what was the final outcome (changes in thinking or behavior)?

### Evaluation Methodology

Each measurement type uses different methodology. You can measure campaign activities relatively easily, while measuring outcomes is more difficult.

**Campaign activities.** Campaign staff can measure campaign activities with little help, simply by collecting data. The evaluation usually requires a simple tracking system to count activities, materials, or other efforts related to a campaign's implementation.

**Creative recall and recognition.** The most popular measure of creative effectiveness is its ability to be remembered. For example, researchers may see how many people are able to spontaneously recall the ad when questioned. Some argue that this measure isn't worthwhile because an ad may be memorable—but completely ineffective. However, we believe it's an appropriate (though incomplete) measure since it also doesn't matter how compelling the message is if nobody remembers it.

The two basic types of memory testing are unaided and aided recall. Unaided recall testing asks respondents to recall an ad without giving any memory prompts (e.g., "Do you remember seeing any ads on gay and lesbian issues in the past month?"). Aided recall asks respondents if they're familiar with an ad while providing prompts (e.g. "Do you remember seeing an ad asking you to vote no on Amendment X, and featuring a construction worker?").

**Outcomes (behavior and attitude change).** Determine overall campaign effectiveness by measuring shifts in target audience attitudes or behavior. Do a poll immediately before your campaign launches and compare it to one done right after your campaign wraps up (see "*Quantitative Research*"). For comparison purposes, phrase questions identically in both polls. Is there an increase in the percent of people who support your issues (and who have also seen your campaign)? If so, your campaign was probably effective.

Polling can tell you:

- If your audience heard the message
- If the message affected your audience's thinking about your issue
- If the message evoked a positive or negative response
- If the message changed people's behavior
- To what degree change occurred

It's not sound methodology to do a single post-campaign poll that asks people whether their opinions have changed in the last two months. Cognitive science shows that people can't accurately judge how they felt two months ago; they can only accurately judge how they feel right now.

Note that attitudes can also change for reasons totally unrelated to your campaign. Conduct pre- and post-campaign polls in a second "control market" to determine whether external factors are skewing your results. Make sure the control market has similar demographics to the original market, but hasn't been exposed to the campaign. Here's how this works.

Let's say you run a large campaign in San Francisco promoting the idea of a surcharge on dirty fuels to fund clean energy innovation. However, just as your campaign wraps up, gas and energy prices go through the roof. Before the start of your campaign, 48% of people in San Francisco supported the surcharge. At the end of the campaign, only 40% of people supported it.

*We need to be realistic about what communications campaigns can achieve—and how quickly they can achieve it.*

**Tip:** For campaigns with very large media buys, some organizations run a mini version of the campaign in a small, inexpensive media market. They then use pre- and post-campaign polling to test the campaign's effectiveness before launching it to a larger, more expensive geography. This testing approach is expensive as it involves full ad production, media buys, and survey research. However, it can save money in the long run for multimillion dollar efforts such as the "Let California Ring" campaign.

In Denver, where nobody saw your campaign, support for the surcharge went from 46% to 31%. If we only had data on San Francisco, we might conclude that the campaign wasn't effective. However, support in San Francisco dropped by 8%, while support in Denver (where the campaign didn't run) dropped by 15%. This suggests that the drop wasn't attributable to your campaign. If anything, your campaign helped limit the drop.

While survey research is a great way to evaluate your communications campaign, it's also relatively expensive. It's also only useful if a significant number of people were exposed to your campaign (you can't expect a measurable change in public opinion if you only reached 1% of the population). If you have a smaller campaign, this type of evaluation is likely more than you need.

### A Word on the Challenges of Evaluation

If you've ever been in a long-term relationship, you know how difficult it is to get your sweetie to change. It's hard enough to agree to a setting on the thermostat—but now imagine asking your sweetie to rethink his or her entire political belief system. Further imagine that instead of being able to sit down and have a civilized conversation, you had to change your sweetie's thinking with a single print ad taped to the bathroom mirror. Sound like a challenge? So are communications campaigns on social issues.

We need to be realistic about what communications campaigns can achieve—and how quickly they can achieve it. Social advocacy campaigns often aim for complex and hard-to-achieve change such as changing beliefs, public norms, or behaviors. Campaigns also often aim for change at multiple levels of society (individual, community, state, or national). To affect change, they must define a social problem and its proposed solution, and reach the awareness of those who hold the power so they will allocate resources and choose appropriate policy alternatives. This is a high standard for success.

Given these standards, we issue this cautionary paragraph: Television and other media outlets help persuade people one way or another when they must make a decision—about who to vote for or what to buy. However, on social issues, media outlets can only take your campaign so far. Even the best paid television spots won't instantly change views that have been deeply held for many years. When the issues you address touch core values (e.g., reproductive freedom, the death penalty, or LGBT equality) expect to face firmly entrenched opinions. Communications campaigns can help change the lens through which people see an issue, but it's unlikely you'll see a significant attitude shift from a single campaign.



## Communications Campaign Plan Template

**Organization Name**

**Date**

*[Use this template as a starting point—but don't get hung up on it. You may find that not all elements of the sample plan apply to your situation. Feel free to adapt it as needed. Combine sections, skip sections, or add your own.]*

<b>Campaign overview.</b>	Two or three sentences that summarize the essence of the campaign. Include your high-level objective, target audience, timeframe, and budget.
<b>Campaign objective.</b>	A very clear description of what the campaign is trying to do. Are you trying to change attitudes (which ones, and by how much?), win a ballot initiative, create awareness of an issue?
<b>Timeframe and approach.</b>	What are the major phases of your campaign and when will they run? For example, you might do six weeks of preliminary research, run a three month campaign, then do two weeks of post-campaign evaluation.
<b>Target audience.</b>	Who exactly are you going to target? Be specific. Include geography, demographics, political affiliations, and attitudes on your issue (undecided, supportive?). If you can't define your target audience, what's your research plan for figuring it out (you can refer readers to the market research part of your communications plan for further details).
<b>Messages.</b>	What are the two or three main ideas you want to communicate and how will you talk about them? Are these messages tested? If not, are you planning to test them? Who are your messengers? If you're not sure what your messages are, what's your research plan for figuring it out? Provide a brief summary here, then refer readers to the market research section for further details if needed.
<b>Creative.</b>	Are you planning on using billboards, TV commercials, radio ads? Do you have rationale for your choices? Are you planning on doing any creative testing?
<b>Market research.</b>	Are you planning to do a baseline poll? Target audience focus groups? Message testing? Creative testing? A pre- and post-market campaign poll? Summarize any proposed research here. Attach the more detailed research plan as a separate appendix if desired.
<b>Media plan.</b>	What's your media budget? How and when are you planning to use this budget? The media plan should outline the media mix, vehicles, and schedule. Summarize the media plan in the body of your overall communications plan but attach the more detailed media schedule as an appendix. Your summary should touch on when you're planning to run your media, across what general types of media vehicles, how many target audience members you expect to reach, and how often you expect to reach them.
<b>PR or earned media plan.</b>	Is earned media a big part of your campaign? If so, what's your strategy for going about this? Are you hiring a PR firm and what are you expecting them to deliver? Who are the media contacts for this campaign?
<b>Campaign evaluation.</b>	How will you evaluate the success of your campaign? Are you planning on pre- and post-campaign polling?
<b>Budget.</b>	Provide a high-level summary of the budget broken down by the major campaign components (e.g., any preliminary research or message development, creative development and testing, media buy, PR firm fees, pre- and post-campaign polling). Attach a more detailed budget as an appendix. The detailed budget should include line-item costs for all of the major campaign components.
<b>Campaign schedule.</b>	Provide a detailed schedule with all of the major deadlines, from initial market research through creative development, through launch and evaluation of the campaign.



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