



‘How to Win Campaigns: Best Practices from the USA’

In March 2015, the Friedrich Naumann Foundation for Freedom hosted a study tour for senior party strategists entitled “Political Communication and Campaign Strategies in the USA.” Leading campaign strategists from parties around the world came to Washington D.C. to hear guest speakers at the top of their fields discuss campaign strategies used in the U.S. The purpose of this report is to explain how these strategies are employed in U.S. campaigns, and to make best practice recommendations about how to apply them in any election in any country.

The speakers discussed tactics for microtargeting, grassroots campaign operations, direct mail, television advertising and campaigning from a national party perspective. These tactics have evolved enormously in the U.S. and are operating in a campaign environment completely different than the one that existed just a few election cycles ago. However, the basic principles of managing a successful campaign are the same across time, country and political system, the most important of which is the campaign message.

MESSAGING

→ Developing a Message

Developing a **strong message** remains the most **basic element** to running an effective campaign, regardless of country, budget size of the race, or political environment. This fundamental principal is often overlooked. Campaigns waste resources by building massive field and microtargeting operations without developing a message first. The best place to start is the **candidate's own beliefs**. From there, the campaign needs to ask itself the following six questions:

1. **What** are we going to say?
2. **Who** are we going to say it to?
3. **How** are we going to say it?
4. What **mediums** are we going to use?
5. **How much** money do we have to do it with?
6. What's the **timeline**?

→ Message Testing

A combination of qualitative and quantitative research can test **word choice** and **phraseology** and help determine which parts of the message should be highlighted or downplayed with which voters.

Focus groups are an important part of the message testing process. Invented after World War II to test commercial products, focus groups bring together ordinary citizens to discuss their opinion on messaging. Political campaigns typically contract with survey research firms to run focus groups for them. Moderators take participants through a guide that outlines the questions and issues the campaign wants to hear **participants' opinions** on. Guides should be designed to enable focused but free flowing discussion.

This method of **message testing** has several important benefits that other forms of message testing do not. They are inexpensive compared with large-scale surveys or polling; allow regular people to talk about their opinions, which gives the campaign a better view of how the mind of an average voter is working; and often bring to light issues and questions that the campaign has not thought to ask participants. Campaigns can use focus groups as an inexpensive method of message testing, but it is important to note that the participants represent a small, non-random sample. Resource-permitting, the results gathered in a focus group can be used as a **jumping off point** for testing a message on a larger scale through methods like polling.

→ Digital vs. Traditional Mediums of Communications

As Internet use becomes more and more widespread, there is a growing temptation among some campaigns to focus primarily on **digital communication**. Success here is typically measured by the number of “**click-throughs**” and “**impressions**”. However, these indicators have not been shown to move poll numbers. The most likely reason for this is that people using the Internet, especially those under the age of 30, are not inclined to believe what they read on the Internet. They recognize that anyone can post anything they want without oversight. They form their beliefs by consuming information critically. They have to hear the same thing four or five times by three to five different mediums before they believe it. This requires a **blended approach** to making an impression. And no matter how sophisticated you are in terms of digital, you need to have a good message

MICROTARGETING

The goal of every campaign is to develop a **strong, convincing message** and deliver it to as many voters as possible. The means for doing so have three different levels of sophistication:

1. Deliver the message to **everyone** possible
2. Define **subgroups**, and deliver targeted messages to them based on their characteristics
3. Deliver targeted messages to an **individual**

Most campaigns for state or national elected offices in the U.S. have utilized technological advances to move into the second stage, known as **microtargeting**. Microtargeting is an extremely helpful tool for campaigns. It involves taking census, consumer, and voter file information and compiling data on marital status, household size, race or ethnicity, income bracket, home ownership, voting history, preference for voting in primaries vs. general elections, party identification, magazine subscriptions and even brand loyalty for beer or household products. In the U.S., companies on the left and right compile this data and create **voter models** that predict an **individual's attitudes** on specific issues, strength of **party affiliation**, and likelihood of **turning out to vote**. They sell this information to individual candidates on their own side of the political spectrum.

The primary purpose of this data for campaigns is to better target their efforts and maximize their resources. It identifies individuals who are likely to belong to the following groups:

1. Those who are **unlikely** or **extremely unlikely** to vote for the candidate no matter what
2. Those who are unlikely under normal circumstances to vote for the candidate, but might be **persuadable based** on a few shared beliefs
3. Those who are **truly on the fence**, but have shared beliefs
4. Those who are **very likely** to support the candidate

Campaigns should treat members of these groups differently in order to maximize their resources. They should not waste **resources** trying to convince the first group. They should focus on increasing **voter turnout** among the fourth group. The second and third groups require the most resources. Voter data can be used to identify and leverage areas of **shared beliefs**. It tells the campaign which issues highlight to which to avoid with any given subgroup. This is an extremely valuable technique for convincing voters without projecting inauthenticity.

The Obama campaign in 2008 was the first to make widespread, sophisticated use of this technique. They compiled extensive data on consumer habits, demographic information and voter history in order to define subgroups of voters and deliver messages targeted specifically to them. Some of the most advanced campaigns in the 2016 presidential election will begin to move into the third stage, in which messages are developed and tailored for a **specific individual**. This involves feeding a “digital press” list of 1000 people and 100,000 pieces of data on those people would come out. For example, the digital press could determine that an individual is a white woman between the ages of 25 and 35 and lives in a certain neighborhood. It could even download a picture of her from Facebook. The full expression of this technique would yield an infinite number of messages specifically tailored to an infinite number of people. Perfecting this will be key in the election cycles to come. Though most campaigns in the U.S. do not yet employ the third stage of microtargeting, today’s techniques can be used to great effect in field operations, digital advertising, and direct mail.

DIRECT MAIL

Direct mail is a **highly effective technique** for leveraging microtargeting data. Unlike most other mediums, it cannot be blocked with ad blocking or caller identification software; or by changing the radio or television channel. Because the messages can be **tailored** for an intended audience, they can be more **complex** and **provocative** than generic advertisements designed targeted to everyone in a geographic area. It is an especially important tool for **outside groups**. For example, non-profit groups that do not (or legally cannot) engage in advocacy or promote candidates can use microtargeting data to identify people who are likely to vote how they want them to and send get-out-the-vote literature to **only those individuals**. Specific examples of how a direct mail campaign can be used to leverage microtargeting data are described below.

→ For those identified as unlikely supporters but with some common ground



For a Virginia Senate race, a Democratic candidate identified people in northern Virginia who were moderate but likely to vote Republican. The campaign sent out a “mailer” advertising that their Republican opponent had been endorsed by the far-right organization “Tea Party Express” knowing that this would not sit well with northern Virginia moderates. This is a **risky strategy** because it relies on the model’s accuracy in excluding voters too far to the right.

→ For those identified as likely supporters with poor voting records

One of the most **inexpensive** and **effective** methods of increasing voter turnout are mailers known in the industry as “**Gerber grams**”. These are simple, black and white one-page letters printed on regular 8.5 x 11” paper. They are addressed to a **specific voter**, and detail how their history of voter turnout compares with their neighbors. They do not contain messages advocating for issues or candidates or political parties, but are instead designed to look like they came from a state or local government agency. In this way, they cut through the noise of political advertising and employ a subtle shaming technique. The key is that they only go to people who have been predicted by the model to be likely supporters.

→ For those identified as likely supporters based on a particular issue



If the campaign has a strong stance on an issue of particular importance to a specific group of voters, it can use a model to predict who those voters are and send them mail that is designed to provoke them into voting a certain way. For instance, after conservative radio host Rush Limbaugh implied that women who use birth control are “sluts,” a pro-choice group sent out birth-control-packet-shaped mailers featuring his face, urging voters to vote for the straight Democratic ticket. This message was **too provocative** to send to all Democrats in Texas, so **strong voter modeling** was necessary to identify the people most likely to agree with and be fired up by the message (in this case young, unmarried, liberal women).

Takeaway

Despite claims that the world is moving towards digital communication, direct mail is still on the cutting edge of paid political communication. It is customizable, versatile, inexpensive, can penetrate almost 100% of the population, and when done right, can leverage advanced microtargeting data efficiently and effectively.

TELEVISION ADVERTISING

Unlike advertising mediums that allow for the use of microtargeting data to tailor specific messages, television advertising is more **generic**. Messages delivered through TV ads should be designed to convince people in the middle of the road who aren't yet convinced. In order to win them over it is important to respect their **opinions** and **concerns**, get inside their heads, and see where they are and why. The best TV ads are infused with **values** that people care about, and can (preferably) agree on; **simple and real**; and cause the viewer to contemplate the message themselves rather than attempting to shove it down their throats. Communicating on shared values means communicating emotionally and its **emotion** that wins votes.

Approaches

There are several approaches to creating political campaign ads with these characteristics. Examples are described below.

→ Appeal to a shared set of values



Source: Joe Slade White

An ad in opposition to a bill that would allow open pit mining showed a glass of clean water and glass of water that contained harmful chemicals. The difference was not discernable by the naked eye, and the voiceover asserted that the bill would weaken clean water regulation. It was successful because it allowed the viewer to complete the message: since you can't tell which water is harmful, you can't protect your family from it without the regulations.

Watch the video [here](#).

→ Inform viewers of information found in opposition research



Source: Joe Slade White

Opposition research conducted against Detroit Mayoral candidate Benny Napoleon revealed that as sheriff, he took 20 police officers off the streets of Detroit to guard his parking spot 24/7. The ad showed crime statistics for the city and asked the viewers: "is this what Detroit needs?"

Watch the video [here](#).

→ Take an abstract idea and put a face to it



Source: Joe Slade White

A campaign in support of the use of stem cell therapy featured a woman who had been injured in a cheerleading accident when she was 14. She told her story and explained what her life was like as a quadriplegic. It was emotional, simple, and applied an abstract issue to a human life.

Watch the video [here](#).

Cautions

Be cautious of the following:

- If you go negative, make sure you have something **positive** to say as well: you have to have your **own message** about what your candidate brings to the table;
- If you have a limited budget, keep the design for your ad **realistic** and do not try to do the cheap version of something expensive; and
- Be prepared to react quickly to your opponent's actions by **planning ahead** for multiple scenarios.

GRASSROOTS CAMPAIGNING



Source: Flickr/Obama for America

Grassroots campaigning refers to the notion that campaigns or movements begin and are built from the ground up. Traditional grassroots campaigning in the U.S. relies heavily on paid staff making voter contact over the **phone** or **in person**. What the Obama campaign did for the pivotal Iowa Caucuses in 2008 revolutionized the way grassroots campaigns are run on the Democratic side. To perform well, it knew it had to depart from the traditional strategy of talking only to previous caucus-goers, and instead attempt to get to every single eligible voter out to the caucuses. In the end, 200,000 people caucused compared with 125,000 in 2004, and the Obama campaign won a resounding victory by employing three key strategies:

1. They built a huge grassroots structure made up of 10,000 volunteers

This not only saved money but also increased **credibility**. Local volunteers knew their communities and the people in them. Using them was far more effective than bringing in paid staff unfamiliar with the state and its residents.

2. They sought input from Iowans

The campaign asked Iowans the best way to **recruit** and **motivate volunteers**, **talk to voters**, and **hold events** – and actually incorporated their **feedback**. The campaign developed a slogan for their grassroots operation, “respect, empower, include.”

3. They gave local volunteers and community leaders autonomy

The “**respect, empower, include**” strategy meant giving volunteers free reign to talk to their friends, neighbors, and community members in the way they believed would be most effective. Volunteers developed their own neighborhood teams and held events and meetings that were never attended by any paid staff. Local leaders were **empowered** to plan, organize, and make decisions when it came to holding campaign events.

This method of grassroots campaigning became known as the “**Obama Way**” of **grassroots campaigning**. Today, it is used both in **election campaigns** and **issue advocacy campaigns**. This method is about using the **community**; having people organize themselves; neighbors talking to neighbors; and letting a movement grow organically.

TRAINING VOLUNTEERS



Campaigns are increasingly sharing **data** on potential voters with **campaign volunteers**. The goal is to provide them with information on which voters to talk to and which specific issues to highlight or avoid. This also empowers volunteers who feel more part of the campaign. As communication become diffused across a number of mediums and voices, **person-to-person interaction** increasingly important.

The 2008 Obama Campaign recognized the importance of face-to-face interaction and was the first to create “**feedback loops**” designed to collect more data. As volunteers spoke with voters, they passed along what they had learned about what was resonating with which voters and why. The campaign was able to use this information to further refine their message and communication tactics.

The Obama campaign **revolutionized** the degree to which **power** can be put in the hands of **volunteers** and exhibited that this strategy can be **extraordinarily effective**. However, there are several challenges that come with a reliance on volunteers, including the possibility that they would say something off-message or counter-productive. To minimize risks, volunteers should receive **high-quality training**.

Key ingredients for volunteers

Volunteers should have three ingredients in their back pocket and should feel confident in all three before attempting to speak with voters. During a training, volunteers should be asked to brainstorm examples of these three elements. They are:

1. **Compelling facts**
Example: Corruption exists in our government
2. **Shared values that relate to each key fact and resonate with everyone**
Example: Justice, fairness, good governance
3. **Techniques for building in an authentic connection**
Example: Acknowledging and relating to concerns the voter has about the candidate

→ Handling Tough Questions from Voters



Source: flickr/LA Progressive

To handle **tough questions**, volunteers should seek to build a bridge from the question back to the **three key ingredients**. There are four steps to take for doing so. In a volunteer training, have participants brainstorm tough questions and responses using these four steps, then present to the rest of the group for feedback.

- 1. Acknowledge and relate**
This does not involve abandoning beliefs. Example: “I hear where you’re coming from” or, “I understand that you have been thinking a lot about this”
- 2. Get to the values as quickly as possible, and discuss shared ones**
Even if the voter disagrees with the candidate or the underlining facts, there is common ground to be found somewhere
- 3. Pivot to supporting fact and tie the shared value to the fact**
Example: “It sounds like we both care a great deal about equal opportunity. My candidate has done x, y, and z in support of this issue.”
- 4. Draw a contrast with the alternative**
Explain how what your candidate brings to the table advances the person’s values in a way that the opponent doesn’t.

→ Best practices for potential scenarios

Getting the Conversation started

- Approach everyone, make **eye contact**, and don’t wear sunglasses;
- Step out in front of peoples’ paths and walk alongside them for a few steps; and
- Be able to hold a knowledgeable conversation on a few **key issues** that matter to certain populations (examples include Medicare for older people)

Handling being disrespected by a voter

- Disarm the voter by asking them **questions** about their themselves and their values;
- Keep smiling and remain **calm**;
- If it’s not working at all, thank them for their time and move on; and
- Never apologize because it equates to backing down from your own values

Avoiding long policy debates

- Bring it back to **values** whenever possible;
- Say “I’m not here to argue about that, but I do know that my candidate cares about (insert shared value); and
- If it doesn’t work, **agree to disagree** and move on to the things you do agree on

→ Planning your next volunteer training

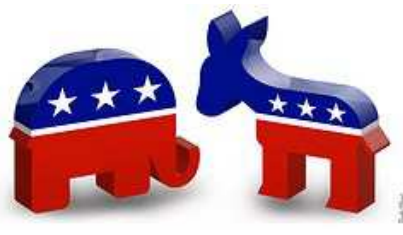
Think about the following:

- What is the next volunteer activity you have planned?
- What do you think will be your **biggest challenge**?
- What are the **values** and supporting facts you will provide to them?
- How will you make sure the volunteers have a chance to **practice** before they go?

Takeaways

It is possible to effectively organize and train volunteers using these practices. With proper training, your campaign can **minimize the risks** associated with volunteers.

THE ROLE OF NATIONAL PARTY HEADQUARTERS



Source: flickr/donkeyhotey

The national arm of a political party is a **central force** to help keep the party unified and on message. This is especially important in federal systems where there are many state and local elections. In the U.S., the Democratic and Republican Parties each have national committees that perform these activities. The **Democratic National Committee** has the following strategies for promoting Democratic Party success in elections that are applicable to other countries.

- **Coordinate** as much as possible with counterparts working on Congressional, Senatorial, Gubernatorial, and State Legislature elections;
- Work to improve engagement and turnout in populations that tend to vote for Democrats;
- Recruit and train **top talent** (both for candidates and staff);
- Hold the opposing party accountable for things they say, especially offensive comments to women and minorities;

- Expand access to the ballot box and protect the right to vote. Techniques for this include lobbying for **early voting** in the states, filing lawsuits when laws are passed that may restrict access to the polls, and placing volunteer lawyers on the ground at the polls to ensure that no one is improperly barred from voting; and
- Conduct **“autopsies”** after elections are lost. This process is underway for the 2014 elections, which the Democrats lost badly.

WRAP UP: APPLYING U.S. CAMPAIGN STRATEGIES ELSEWHERE



Source: pixabay/public domain

One of the primary differences between campaigns in the U.S and in most other countries is the amount of money involved. Some of the techniques discussed in this report are highly effective and advanced but cannot be employed elsewhere because they require too much money. Despite this difference as well as differences in electoral systems and cultural backgrounds, certain principles are the same and can be applied in any campaign.

→ **Selecting an Appropriate Candidate**

This is especially important in a first-past-the-post system because the candidate is the one who has to carry the momentum in his or her district. It is also important in list situations because the candidate at the top of the list is the face of the party and who average voters are most interested in.

→ **Developing of a Message**

The **message**, rather than the details of a policy platform, is what catches voters' attention. This is a simple principle, but is often disregarded. A good message involves asking the message attractive to voters; and using language that is comprehensible for the average voter, especially in situations with a large education and income divide.

One of the best methods of communicating a message is creating **powerful imagery**. If done properly, voters will come to associate the image with the candidate's message. For example, the German Free Democratic Party posted a billboard along a stretch of highway with notoriously bad traffic that read: “this traffic jam brought to you by the Red-Green Alliance.” Voters connected the image of the billboard with their feelings about the traffic. Then they connected it with the FDP because its plan to reduce traffic was a major part of its campaign platform.

→ Targeting

In a campaign, money, manpower and time are scarce and must be economized with a strong strategy. Determining which people the campaign should communicate with and which it should ignore is an essential component. In most cases, the money isn't there to do the type of microtargeting done in American campaigns. Using “**desktop targeting**”, which involves looking at **available data** and drawing conclusions from it can be done anywhere. For instance, data showing which areas your party has performed better than average is available in most countries. **Strengthening your strengths** among the target population is a better technique than trying to convince people who disagree with you.

The campaign strategies described in this report are **highly advanced** and have the potential to be **hugely effective** when executed properly. Trying to imitate what campaigns do in the U.S. will probably not yield strong results because the system is different and the necessary resources are not available. However, conclusions about U.S. campaign techniques can be drawn and applied elsewhere.



Participants of the study trip on 'Political Communication and Campaign Strategies in the U.S.' with Amy Dacey, CEO, Democratic National Committee (Source: FNF)

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