



SAG - AFTRA Merger Campaign

Screen Actors Guild and American Federation of Television and Radio Artists, Jan 1,2013

Summary: 2013 Silver Anvil Award of Excellence Winner — Internal Communications — Associations / Government / Nonprofit Organizations

On March 30, 2012, the Screen Actors Guild and the American Federation of Television and Radio Artists merged, marking a momentous achievement that changed the landscape of entertainment and media. Merger proposals had gone to members of both unions twice before and had twice failed. The unions knew success would come if members clearly understood the benefits of merger and if members were a significant part of the effort. Along with a concerted transmedia communications campaign, member activism would be a critical component. As a result, the merger was overwhelmingly approved by the members of both unions, immediately forming SAG-AFTRA.

Internal communications includes programs targeted specifically to special publics directly allied with an organization, such as employees, members, affiliated dealers and franchisees.

Full Text: OVERVIEW

On March 30, 2012, members of the American Federation of Television and Radio Artists (AFTRA) and Screen Actors Guild (SAG) overwhelmingly voted to approve a historic merger, creating a new entity, SAG-AFTRA. This momentous achievement changed the landscape of the entertainment and media industry while impacting the labor movement as a whole. The effectiveness of the campaign was immediately apparent when the ballots were tabulated and reported via a livestream press conference that same day. The merger was approved by the members of both unions with 86 percent of AFTRA members voting yes and 82 percent of SAG members voting yes.

In late 2010, the national boards of SAG and AFTRA cautiously began to inch toward collaboration on merger. With overlapping coverage of performers in some contract areas, the unions had discussed the idea of merging almost since their beginnings in the 1930s. In recent times, merger proposals had gone to the members of both unions twice, and had twice failed to pass with SAG members. In fact, less than a decade prior, in 2003, merger failed to pass with SAG members voting 58 percent, just 2 points shy of the required supermajority of 60 percent.

The unions knew success would come if members clearly understood the benefits of merger and if members were a significant and visible part of the education and outreach effort. Member volunteerism and activism would be a critical component of the communications campaign.

The communications staff of SAG and AFTRA, working with the elected leadership, developed a multi-phase transmedia campaign that would reach all members of both unions with targeted messaging – much of which would feature recognizable union members like George Clooney, Tom Hanks, Tony Shalhoub, and Bob Edwards, all clearly supporting and often personally explaining the benefits of merger.

RESEARCH

The campaign kicked-off in early 2011 with a cross-country "Presidents' Listening Tour" that brought the presidents of both unions together with members. When both unions' boards voted to pursue a merger plan, the team entered the research phase and began to solicit member input and analyze member data. Active education and outreach commenced in January 2012 with SAG President Ken Howard's announcement of the upcoming merger vote during the Screen Actors Guild Awards® telecast on January 29.

The union used a research model that included

1. Internal analysis of member data (confidential and proprietary),
2. External, primary qualitative and quantitative research conducted by the nationally recognized polling firm The Mellman Group, and
3. Various media measurement and tonal evaluation programs.

Focus group panels were convened in New York (2) and Los Angeles (2). In addition, 15 guided telephone interviews were conducted with members in regional markets and representing various work categories (actors, broadcasters and recording artists). The results were used to develop the sample profile and survey instrument for the quantitative survey conducted via telephone with 800 members in November 2011. Results were collated and analyzed in December and message development and campaign plan development were underway by January 1, 2012.

PLANNING

Our critical planning goal was for the merger to pass. The strategic objectives as a part of that plan were to

1. Educate and inform members on key factors affecting their work lives;
2. Demonstrate how merging the unions would positively impact their futures; and
3. Clearly and concisely communicate the core merger benefit messages: increased bargaining strength; unity and solidarity leading to greater leverage; and merger is the first step to begin work on combining the benefits plans.

Presenting all information through the campaign in a manner easy to access and understand was imperative so that each member would be able to cast an educated vote in favor of merging AFTRA and SAG into one union, SAG-AFTRA. Through the advent of various technological advances since previous merger attempts, SAG-AFTRA was able to reach members nationwide in a consistent and personal manner that would have previously been impossible.

In correlation to the research findings, the information acquired through research of former failed merger attempts was invaluable in seeing the culmination of a more than 60-year endeavor to merge the two unions.

Our primary target audience was the 165,000 active members of SAG and AFTRA which is comprised of a diverse group of entertainment and media professionals including actors, announcers, broadcast journalists, voiceover artists, DJs, news writers, news editors, program hosts, recording artists, singers, stunt performers, and other media professionals. Key secondary audiences were the media, industry opinion leaders (producers, studios, networks, agents, managers, publicists, casting professionals), and the general public.

The education and outreach program budget including research, strategy, production, design, implementation and evaluation was under \$550,000.

EXECUTION

The education and outreach campaign consisted of multiple platforms and collateral including:

- Campaign identity system (SAG-AFTRA One Union).
- Social media platforms on Twitter, Facebook and blog commentaries.
- National media launch via President Ken Howard's televised SAG Awards speech on merger.
- High-impact, graphic direct mail straight to members' mailboxes.
- Coordinated, targeted press outreach to place informed pieces on critical topics.
- Print collateral materials (brochures, one sheets, posters).
- Consistent outreach to industry leaders via email, in-person presentations and one-on-one meetings.
- Quick response materials including FAQs, Top 40 Mythbusters, Daily Talking Points.
- Web videos featuring recognizable and authoritative member spokespeople.
- Supportive press stories featuring Jon Cryer, Adam Arkin, Sally Field and others.
- Campaign website.
- House party "host kit."
- Member-to-member outreach on movie and television sets and at gathering spots.
- Automated telephone calls and messages to members.
- Member-manned phone banks.
- Online supporters sign-up.
- 24/7 voicemail, 8–6 (PT) live email and telephone member service representatives to answer questions.
- GOTV effort via direct mail and social media reminding members to mail their ballots, which netted an overwhelming yes vote.
- Tweets from Kate Walsh, Alec Baldwin, Alex Pettyfer and other recognizable members.
- Livestream and in-person informational meetings featuring a panel of elected and staff leaders answering questions submitted via Twitter and email.

The entire communications campaign was done in-house. Both unions utilized media relations software for press outreach, clip retrieval and analysis. In-house communications technology was used for member email blasts. Printed materials were run by local union printers around the country and we engaged website programmers to support the creation of the SAG-AFTRA One Union merger website.

EVALUATION OF SUCCESS

The union tracked more than 2,900 news stories with an ad equivalency of nearly \$3 million. More than 20,000 unique visitors logged on to our live stream press conference with nearly 7,000 watching the entire feed. Social media accounted for 5 million gross impressions across Twitter, Facebook, and Internet blogs and chat sites, with supportive tweets from a number of highly-recognizable members including Ron Perlman, Alec Baldwin and others. Other Key Performance Indicators (KPIs) are reported in the KPI Evaluation, which is included in our submission binder. SAG members voted 82 percent in favor of the merger. AFTRA members favored the merger with 86 percent, exceeding the 60 percent threshold needed of both unions' membership for passage. The merger was effective immediately on March 30, 2012 and we are now engaged in communications support for the internal integration effort and are promoting the new union. We have undertaken an identity development initiative to create the first graphic look of our new union and are conducting an internal communications audit. Once these efforts are concluded, we will move forward on the development of a five-year strategic communications plan.