Field Guide for Effective Communication

Competitive Enterprise Institute & National Media Inc
FIELD GUIDE FOR EFFECTIVE COMMUNICATION

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# Table of Contents

Acknowledgements ............................................................ vii
Foreword ................................................................. ix
Introduction ............................................................... xiii

1 The Value of Communicating to Joe and Joan “Citizen”
   Fred L. Smith, Jr. ......................................................... 1

2 Values ................................................................. 9
   Aaron Wildavsky’s Cultural Values Theory, Brendon Swedlow .......... 10
   The National Media Political Values Theory, Alex Castellanos ............ 18

3 Survey Research .......................................................... 31
   In the Beginning... How and Why We Began,
   Will Feltus & Alex Castellanos ......................................... 31
   Wildavsky and Beyond, Don Devine .................................. 40

4 Strategic Planning
   Clifford May ............................................................. 47

5 Message Crafting ........................................................ 57
   The Save the Children from Malaria Campaign, Roger Bate ............... 57
   Values-Based Communications Laddering, Rick Otis ....................... 64

6 Delivery and News Media ............................................... 75
   Crisis Management, Nick Nichols ....................................... 75
   Goals, Markets & Media, Herb Berkowitz ............................. 82
   Reducing Media Hostility; Gaining Positive Coverage, Larry Hart ......... 86

Conclusion ............................................................... 93

Appendix A ............................................................... 95

Appendix B ............................................................... 107

Bibliography and Suggested Readings .................................... 109

Field Guide Presenter Bios ............................................... 113

About CEI & National Media ........................................... 119
As always, a project of this kind could not be accomplished without the assistance of many contributors.

In addition to the presenters who volunteered their time to take part in the values-based communication workshop that led to this field guide, we wish to thank the following: Jody Clarke, for her efforts in organizing the conference and managing the production of this guide; Brendon Swedlow, who understands perhaps more than anyone Aaron Wildavsky’s cultural values theory, for his editing expertise; Liz Jones, Anne Duke, and Deborah Haynes, also for their editorial assistance; Erin Brophy and Carol Wingfield, for the graphic design and layout of the book; and Emily Duke for her efforts in helping to make this project a reality.

We would be remiss in not expressing our gratitude as well to Robert Novak, one of the country’s most well-known and respected journalists, for writing the foreword.

Finally, the conference would not have happened without the vision of two people who have long realized the need for a values-based communication approach in the conservative-classical liberal movement: Gregory Conko and Sam Kazman. We are grateful for their contributions, and to all who understand the importance of what we are tying to accomplish.
When I appear on the lecture circuit, I often am asked how I can manage at least two afternoons a week on CNN’s “Crossfire” to sit across the table from James Carville and Paul Begala and take abuse from them. I usually reply with a wisecrack, saying that CNN pays me handsomely to undergo that travail. Unserious though it is, that answer tends to confirm the premise of my questioners that this is less than an enchanting experience for me.

In fact, it isn’t. Day after day, I defend myself and my beliefs from a panoply of accusations: Why do you want to poison water and air? Don’t you put the interests of corporate business over that of the people? Why deprive poor children of needed nutrition? How can you justify tax cuts for the rich that they do not need? What is the justification for control of government by big business at the expense of the poor?

It does not really matter that these accusatory questions are grounded in quicksand. Carville and Begala have developed a mantra based on attack, attack, and then attack again. They have written and continue to write little books that are really attack manuals, which clearly are being used by left-wing politicians and activists. That is why this communica-
tions field guide is so valuable in providing guidance to deal with the Carville-Begala onslaught.

I must admit that, as a conservative journalist who has been trained to see both sides of any story, I often feel frustrated in dealing with my obsessive antagonists. Like the French in 1940, I find my Maginot Line defenses outflanked by Carville and Begala.

Politicians and corporate officers frequently find themselves in the same uncomfortable posture as I do. We all have found ourselves in the position of while knowing that the policies of freedom are beneficial to all people, we are categorized as narrow-minded, selfish champions of special business interests. All of us can be grateful for this field manual.

I am not personally familiar with all the participants in the day-long workshop that led to this publication, but those that I do know are more than a match for the street fighters of the left. Fred Smith of the Competitive Enterprise Institute and Alex Castellanos of National Media, who led the workshop, are eagerly sought by “Crossfire’s” producers as occupants of the program’s “right-wing” guest seat. So is Cliff May, an experienced journalist and political publicist. They all give much harder than they get. I have known Don Devine for thirty years as a brilliant political strategist. I have had contact with Herb Berkowitz as one of Washington’s most skilled public relations purveyors.

In their introduction, Smith and Castellanos point out that “the free-market policy community,” trying to “be taken seriously in the world of ideas,” aims most of its arguments at “intellectual elites” and ignores a larger population. “Our failure to engage the public is dangerous because populist traditions flourish in the United States,” the authors add. Thus, this is a primer for engaging ordinary people.

It is a fascinating but not quick read, a mind-bending exercise on how to get to the public the free-market message which relies for its cultural underpinning on the late political scientist Aaron Wildavsky, whose work has guided many of those who participated in the workshop. Wildavsky’s “cultural values” theory is a basis for figuring how to get the message of freedom through to people who do not consciously regard freedom at the apex of their values.

In putting forth his “political values theory,” Alex Castellanos asks how it is possible to “present freedom” and gives this answer: “My goal is not to be less conservative, not to love freedom less, not to hop over on the left and make that occasional compromise. My goal is to say if you are really conservative, if you really believe, then you’re not only
doing what’s right, you’re not only doing what’s economically better, you’re doing what works better and helps more people.”

The recommendation by Castellanos is to “always start on offense.” He and his colleague, Will Feltus, project that offensive one step further: “the way liberals sell to the right regulating business we could sell regulating government.”

Make no mistake, however. This is not an easy task. Don Devine cautions: “when you start reaching, you worry about losing your base.” Cliff May says: “always keep in mind that whoever is explaining is, in the end, losing.”

Public relations counselor Nick Nichols has two big pieces of advice for corporate America. First, stop trying to “turn a serious problem into silk,” because “people will see through it.” Second, stop appeasing trial lawyers, environmental groups, or any adversary. “Every time a company agrees to roll over and give New York State Attorney General Eliot Spitzer 10 million bucks in order to have him stop chasing them, it tells the consumer that the company did something wrong.”

Indeed, Herb Berkowitz sees basic defeatism within American industry. When a client tells him from the start to prepare a “fallback position,” he concludes that “their ultimate goal was to lose.” But Berkowitz goes on to warn: “what ‘sells’ with our good right-wing friends isn’t necessarily something that’s going to turn around a liberal journalist.”

Careful study and implementation of the Field Guide for Effective Communication might produce more effective spokesmen on the right appearing on “Crossfire” to assist me. Conceivably, it might even help me do a little better in confronting Carville and Begala.
The free-market community has long been engaged in waging the war of ideas. It has never fully realized, however, that winning this war requires an effective communications strategy that reaches relevant publics, in addition to having good policy to promote. Part of the reason the free-market community has failed to translate its ideas into policy victories is because it does not communicate as well as its ideological combatants do. We have had good products; however, we have not marketed them well at all.

The political world is the world of rational ignorance. People have few reasons to spend their time learning the nuances of complex policy questions because they believe they can do very little about them. People are rational. They spend time familiarizing themselves with things about which they can do something. In politics, people aren’t ignorant because they’re stupid; they’re ignorant because they’re smart; and if we insist on turning them into policy wonks, then we are being stupid!

The free-market policy community has been intent on earning its intellectual spurs, in an effort to be taken seriously in the world of ideas.
We aim the bulk of our arguments at the intellectual elites (the “chattering class”), a group that is ideologically predisposed to reject these arguments. The public has ignored any efforts to bring the debate to a larger population, as it is rational for the average person to ignore arguments among policy wonks. Given the populist traditions that flourish in this country, our failure to engage the public is dangerous.

To address these problems, CEI and National Media brought together a group of communications experts to discuss practical tools that policy analysts and others in the conservative-classical liberal movement may use to communicate better to ideologically opposed elites and the broader public. These communications efforts are critical, though they have often been neglected in the past. Too often, free-marketers have spoken in a language suitable to persuading others with similar values, but have ignored the egalitarian “fairness” arguments that have proved to be more persuasive to liberal elites. Only occasionally have the populist arguments critical to humanizing the intellectual debate been addressed. There are exceptions. For example, the Institute of Justice’s creative efforts to frame their debates in terms appropriate for mass consumption are very impressive. But, in general, policy groups have used language suitable to persuading elites with similar values. We hope to address this problem in this guide, which is a distillation of the presentations made at our communications workshop.

We hope you will gain some valuable insight that you can apply in your work, whether you’re a public relations professional, businessperson, policy analyst, or anyone who is interested in learning how to spread the free-market philosophy more effectively.
The Value of Communicating to Joe and Joan “Citizen”

Fred L. Smith, Jr.

Michael Kelly, the columnist for *The Washington Post* who was tragically killed during the Iraqi war, had many good lines, one of which is relevant to improving political communication. He started his career as a television journalist and was doing quite well. But one day he quit. He was later asked, “Why did you leave? It seemed like such a promising career.” He replied, “Well, yeah, but one of my co-hosts said to me one day, ‘Michael, you just don’t get it. In television journalism a hair dryer is every bit as important as a pad and pencil.’” While that comment prompted Michael to leave broadcast journalism, his story brings up an important point: the way we present ourselves is as important as the content of our messages.

CEI and National Media work very closely with many businesses, trying to persuade them not to apologize for being capitalists. That work is important because industry is a significant channel of political communications.

Corporations spend more than half a trillion dollars a year selling
products. Their messages and ads are trying to reach Joan and Joe “Consumer,” and yet they are also reaching Joan and Joe “Citizen.” In other words, business not only reaches its customers in the private competitive world, but also communicates (sometimes unwittingly) in the political policy world.

This raises the question: when you talk to Joan Consumer, what are you also saying to Joan Citizen? Business doesn’t ask this question very often. Why not? Because the people who handle product sales are in the marketing division, while the people who handle policy concerns and monitor political threats to the industry are in the government relations division.

Business has not yet integrated these two separate worlds into a consistent strategy. This situation exists for a couple of reasons. First, the two divisions are far apart within the organization of the company, and second, many CEOs don’t like politics. They want it to go away.

If we could find ways of encouraging companies to think of a dual message, to sell not only products but also the moral legitimacy of a free enterprise way of producing, distributing, and pricing, I believe that would make our policy work much, much easier. At CEI, we’re conducting research to understand the way people go about making decisions, to find new methods to create and distribute free-market messages, and then convince the business leaders of the need to legitimize both their products and their industry.
Business generally uses two institutional advertising strategies. CEI has labeled those “apologetic” ad strategies and “legitimizing” ad strategies. The apologetic ads say, “Yes, I know we did horrible things. We’re very sorry about that, but you don’t understand. It was a different time, technology wasn’t developed and we’re really sorry. We’re going to do better. We’re really going to do better in the future.”

An example of this type of ad can be found in Figure 1.1. The chemical industry spent over 10 million dollars producing and distributing this ad year after year after year. But what message did this ad convey? You heard nothing about why chemicals might be useful things to have. All you heard was that we got rid of 93 percent of the toxic ones. Meanwhile, the 7 percent seems to be indestructible and obviously very dangerous because they’re trying to get rid of it. The ad ends with a new slogan for the industry’s approach—“Responsible Care.”

Responsible Care? Imagine this scenario: you’re sitting at home and your teenage daughter or son walks into the room. You look up from reading the paper, and your child says, “Dad, Mom, I want you to know, from now on I’m going to be responsible.” Then your teenager walks out of the room. You’re all relieved at this point, right? Think again. The whole concept that from now on you’re going to be responsible suggests that up to now you have been irresponsible. This is a typical apologetic ad.

Legitimizing ads, the ads that we think have value and occasionally are done by industry, discuss the benefits derived from a product. This type of approach is important because people are “rationally ignorant.” They have real lives and no real reason to spend lots of time reading policy reports or learning about issues that have no apparent impact on their lives. So we are all “rationally ignorant” about most things. If
people are going to understand that a world without chemicals might be a scarier world, you’re going to have to give them some reason to believe it. Industry equates profitability with legitimacy, because that is the standard by which businesses judge each other. But if profitability were the only moral yardstick, cocaine dealers, prostitution rings, and other similar “businesses” would all be legitimate. Evidently, some non-business people are applying different standards to business than business applies to itself.

Figure 1.2 is almost the epitome of a legitimizing ad. The plastics industry has several others like this. Some of you have probably seen the one in which a mother is warming a baby bottle. The mother looks down at her child, and the bottle slips from her hands. Then, in slow motion, it falls toward the tile floor where the baby is lying. When the bottle bounces off the floor instead of shattering, you think, “Thank God it’s plastic.”

This ad came about because the plastics industry was getting hammered. Those of you who know the movie “The Graduate” may remember the scene at Dustin Hoffman’s graduation party in which this particularly irritating neighbor, a businessman, looks down at Dustin’s character and says, “I just want to say one word to you... plastics.” That phrase quickly came to symbolize a faddish contempt for the modern world. What soon followed was a whole array of anti-plastic policies.

After a while, the plastics companies decided to go on the counter-attack. Their initial ads featured downhill skiers who talked about the benefits of high-tech plastic skis. This prompted us to say, “Well, that’s good, but if you can go skiing in Aspen and drive Corvettes, you’re probably already aware that capitalism is a good idea.” These companies really needed to reach out to people with the egalitarian value that
plastics are not only good for society at large, but they’re particularly good for the individual—in this case, a heart attack victim, and in the case of the plastic baby bottle, mothers and children. In many ways, it’s not just a benefits message, it’s a benefits message that carries the fairness value, the egalitarian value.

CEI has done focus group research on legitimizing versus apologetic ads, and made some interesting findings. Apologetic ads tend to make a rationally ignorant public more likely to support greater regulation than legitimizing ads. The former tend to create new doubts in the mind of the audience, leading to exactly the sort of government intervention we seek to avoid. We need ads that drive home the point that a world with more regulation, more taxes, and more restrictions is a world that is not only less free and less rich, but also less fair.

In our focus groups, the ad on chemicals, for example, raised all kinds of questions. What is this stuff? Why is it so hard to get rid of? Why are they pretending that they’ve done a good job when the hard part of the problem lies ahead of them? And so on. The participants in the focus group were concerned that toxic waste was an insurmountable problem, that companies may not be following the rules, and that maybe the 7 percent of waste not yet cleaned up was created by those bad actors who are never going to do it on their own. Furthermore, they did not find the information presented in the ad credible.

Apologetic ads not only don’t work, they also exacerbate the very problems they seek to address. Legitimizing ads, by contrast, can be very effective. Another example of a legitimizing ad is one CEI developed regarding the pharmaceutical industry during the debate over reforming the Food and Drug Administration.

The ad in Figure 1.3 delivers a general message about the value of drugs: people die if drugs are delayed by regulation. This message is not one that industry would feel comfortable delivering directly. If the FDA regulates you, you can’t be overly critical of it in public. Our ad essentially took the benefit message, the egalitarian message, and targeted a particular policy group-FDA reformers.

So far, I’ve talked about the importance of a company legitimizing

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<th>Apologetic ads:</th>
<th>Legitimizing Ads:</th>
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<td>• Use technical claims to explain away a perceived transgression.</td>
<td>• Mainly discuss the benefits consumers derive from the products or industries in an effort to promote &quot;cultural legitimacy&quot; or acceptability.</td>
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<tr>
<td>• &quot;Apologize&quot; for some past transgression and promise to reform.</td>
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its products. As, or more important, is the need for ads that legitimize the entire industry. The graph in Figure 1.4 shows the reputations of various firms in the oil industry. The bottom set of curves shows the reputation of the oil industry in general.

The graph indicates that some companies have better reputations than others. Branding is one way by which a company can raise its reputation, but the industry overall always has a lower reputation than specific companies do. It’s the industry that gets regulated, not individual companies. The only way you can protect your company ultimately is to protect your industry.

Another example of that same point is the March 1989 Exxon Valdez oil spill. As you can expect, when this happened, Exxon’s credibility dropped dramatically with the public. The credibility of other companies, however, dropped a lot less, demonstrating that there is value in maintaining the reputation of your company. But while certain individual companies suffered less than Exxon, the oil industry’s reputation suffered almost as much as Exxon did. Politically, this meant the oil industry as a whole was damaged in the end, and not just Exxon. If you want to defend yourself against the regulating regime, you have to defend your industry and not just your particular company.

Companies have not always been so slow in defending their industries. In his wonderful book, *Creating the Corporate Soul, The Rise*
of Public Relations and Corporate Imagery in American Big Business, Roland Marchand suggests that industry in the early 1900s was aware that the world was moving into a socialist period. When governments nationalized many sectors of American industry in World War I, companies were terrified that they might have no future in America and responded over a period of decades by developing a moral defense of themselves. Industry did that reasonably well by disseminating messages that created a corporate soul. But, after World War II, when industry could make money by doing almost anything, it went to sleep again. In a sense, industry needs to wake up and revitalize its understanding that companies are always operating in a hostile environment, and if these companies can’t make a moral defense of themselves and their industry, they won’t have a future.

A current example of creating a corporate soul comes from a popular ad for cell phones (See Figure 1.5). The interesting thing about the ad
is that, according to *Creating the Corporate Soul*, AT&T has had it right for a long time. The first AT&T institutional ads in the early part of the 20th century were filled with information about how marginal costs operate for public utilities. The idea was that if the public only knew as much as AT&T did, it would be much more sympathetic to AT&T’s pricing and network structures. That didn’t work. AT&T then went quickly to egalitarian themes and to reach out—“Reach out and touch someone.” Ads like this one show how the cell phone becomes a solution to a problem for working mothers. It captures an element that the cell phone is not only an instrument of freedom, not only an instrument of wealth creation, but also an instrument that makes it a little easier to have fairness in a world with a lot of stress.

AT&T has some advantages. It was a very large part of the telephone industry, so the value to the industry was captured by the company. It also was a company very much in touch with consumers, so it had to communicate. It did, and arguably, as a result, it resisted some rather strong regulatory attempts in the 1920s and 1930s. At the same time, the company was spending tens of millions of dollars to legitimize itself. Virtually no company is spending anything like that today, and it shows.

The free-market community can learn much from the successes and failures of industries. If we apologize for who we are and what we stand for, people will find faults with our ideas. If we legitimize what we do and demonstrate how people can benefit from our proposals, however, then we might start winning some skirmishes in the ongoing battle of ideas.
This chapter provides two closely related accounts of how to articulate values in political communications. Both accounts attempt to move beyond liberalism and conservatism to identify values overlooked by standard left-right thinking regarding political ideology. The first, building on the work of the late political scientist Aaron Wildavsky, views the values of liberty, equality, and order as manifestations of rival political cultures. The other distills Alex Castellanos’s research and experience advising political campaigns. He finds that values-based issue clusters define five distinct groups in the U.S. population, with the right composed of religious and law and order conservatives and the left of those championing equality, fairness, and caring. In the middle, along with the “care and fair” crowd, are pocketbook or economic voters. Brendon Swedlow emphasizes that values-based communications should be targeted at different kinds of political sophisticates in the general population, while Alex Castellanos suggests ways the Republican Party can appeal to voters in the middle without losing its base on the right.
Aaron Wildavsky’s Cultural Values Theory

Brendon Swedlow

I am a political scientist and former student of and research assistant to Aaron Wildavsky. Fred Smith invited me to participate in this project because he has long seen the value of Wildavsky’s form of cultural analysis for understanding and influencing national politics, public policy making, and political communications.

I’d like to begin by outlining some of the advantages this type of cultural analysis has over examining politics through standard liberal-conservative lenses, because the advantages may not be immediately obvious. Next, I’ll sketch the basic features of this analytical approach, its weaknesses as applied in survey research design, and how some of these problems might be solved by incorporating insights from the literature on public opinion and voting behavior. I’ll close by discussing the elements of a research and opinion-monitoring program that will facilitate a values-based communications strategy.

One major advantage Wildavsky’s cultural approach to analyzing politics and political communications has over standard liberal/conservative approaches is that it is theoretically based. Having a theory about what kinds of political values exist and how one can relate these to organizations and institutions on the one hand, and to beliefs about human nature, the environment, and the economy on the other hand, allows political analysts using this approach to anticipate and predict much of what happens in the political world.

A second advantage of this approach is that it links political values to many other things. It explains, for example, why liberals are perceived as environmentalists and why conservatives and libertarians are not.

A third advantage that Wildavsky’s brand of cultural analysis has over standard left/right analysis is that it more accurately corresponds to observed political and value pluralism. As Wildavsky used to say to critics, “If you think my four-box world is too simplistic of an account of politics, what does that say about the two-box world we are living in now?” The left doesn’t understand the right, and the right doesn’t understand why CEI, for example, can be described as a conservative, free-market organization. It’s always been a mystery to me how political analysts recognize that America is distinguished by its individualistic political culture, but when it comes to characterizing American (or any other) political ideology, those same analysts only recognize liberals and conservatives.
A final advantage of cultural analysis over standard left/right approaches is that it makes room for libertarians and free-market advocates, while also showing how their preferred forms of political and institutional relationships are derived from dimensions of social relations shared with both liberals and conservatives. In distinguishing libertarians from liberals and conservatives while specifying their common ground, political analysts using this cultural approach are in a good position to suggest which political communications will help build cultural coalitions and which are likely to increase cultural conflict.

At this point, I need to define political culture in relationship to this analysis. Political culture, as I’m using the concept, is a compatible pattern of social relations, political values, and beliefs about human and physical nature, among other things. In essence, political culture is a package of institutions and ideas that go together. What’s attractive about the conception of political culture is its comprehensiveness. Once you know one or two things about members of an audience, you can predict their values, which assists in targeting for political communications purposes.

**INDIVIDUALIST**

In the individualistic or libertarian pattern, social relations are characterized by networks of individuals connected to each other. The primary value is freedom or liberty. Nature is frequently construed as resilient, granting the greatest scope for freedom and networking.

**HIERARCHICAL**

Next we have the familiar hierarchical forms of social relations: church and state, the U.S. military, or the South. Their primary value is order, and they frequently view nature as complex or resilient to a point determined by the proper authorities, whether religious or scientific. For social hierarchs, it’s very important for everything to be in its proper place.

**EGALITARIAN**

An egalitarian political cultural environment features a consensual community. As is true for social hierarchs, of which social conservatives are one kind, community boundaries are also important for egalitarian liberals. But what their ideal community looks like on the inside is different from how the ideal community of a social hierarch looks. They want equality in an egalitarian community, whereas, in the socially hierarchi-
FIG. 2.4: All four cultural types on dimensions
cal community, they want to maintain differences between people. Egalitarians frequently gravitate toward viewing nature as fragile because this helps them limit the inegalitarian institution building of hierarchs and individualists.

**Fatalist**

Finally, you have a fatalistic pattern in which social relations are tenuous. Not surprisingly, fatalists are not very engaged in politics, so I will only mention them briefly here. Fatalists hope for and value good luck and fear bad luck. That’s about as far as their political guidance goes. Nature is frequently viewed as unpredictable in this political environment. As in the political sphere, there are no regularities to be identified, so what’s the point?

The other environments all expect regularities of certain kinds. Because values have these factual entailments, there is an opportunity to pry people away from their beliefs and convert them to beliefs that are more accurate when things don’t work the way one expects—when the world isn’t resilient or nature isn’t fragile, for example. So, facts matter, and challenging elite views about human nature, the environment, and/or the economy is one potential way to change the values associated with these beliefs.

I have a few diagrams to help demonstrate these political and cultural relations in a more schematic form.

Figure 2.1 shows the individualist network in which the primary value is freedom. In all these diagrams, we also have a construct of nature represented by a ball in a landscape. Here, the ball is in a deep pocket, difficult to dislodge, which represents nature as resilient.

Figure 2.2 represents the hierarchical stratified collective of individuals. Everyone and everything has its proper place in this political community, and order is the primary value. Nature is construed as complex; the ball is in a shallow pocket. It’s important to understand where the limits are, so that the ball won’t be knocked out of the pocket.

Figure 2.3 represents the egalitarian community, which combines high levels of collective action with high levels of individual autonomy. As with social hierarchy, including social conservatives, there is a well-developed community boundary in egalitarian social and political environments—strong distinctions are made between “us” and “them.” Equality is the primary political value.

Figure 2.4 puts it all together and arrays these four cultural types
on dimensions. In individualistic patterns of social relations, you have high levels of individual autonomy with low levels of collective action. Hierarchical social relations, by contrast, have high levels of collective action, and low levels of individual autonomy. Egalitarians try to have it all. They try to combine high levels of both collective action and individual autonomy, generally through consensus decision making.

Arraying the political cultural types along these two dimensions also helps to suggest the basis for building cultural coalitions. Shared dimensions are one basis for such coalitions. Social hierarchs and egalitarians, for example, share a concern for the collectivity, for the community. Individualists and egalitarians, meanwhile, both value high levels of individual autonomy and liberty. Opposites also attract, and this, in part, may be the basis for the Republican coalition of social conservatives and business and free-market libertarians.

The political cultural basis for coalitions is discussed in the article, “Requisites for Radical Reform,” written by Wildavsky and another one of his students, Dennis Coyle. This analysis attributes the success of President Reagan’s 1986 tax reform and the failure of President Nixon’s welfare reform to how different political cultural coalitions reacted to these reforms. Reagan’s tax reform appealed to individualists by flattening rates, to egalitarians by taking more poor people off the rolls, and to hierarchs by re-legitimating the tax system. Nixon’s welfare reforms did not appeal as broadly across cultural lines; among other things, egalitarian elites were not willing to support reforms that tied guaranteed income for the poor to work requirements, nor to legitimate a political system that required such compromises on their part. By contrast, as Alex Castellanos will explain, by the time President Clinton proposed “the end of welfare as we know it” enough egalitarian elites had come to accept that welfare without work requirements hurt the poor they were trying to help. In specifying the basis for political cultural coalitions, this form of cultural analysis goes a long way toward suggesting the kinds of political communications that will successfully build such coalitions.

There are, however, some problems with cultural analysis. A general problem is that we have an underdeveloped understanding of how individuals interact with institutions to reproduce a cultural pattern or shift to a new one. One reason that our understanding of the causes of cultural stability and change is underdeveloped lies in the way these political cultural concepts have been operationalized for survey research. Wildavsky and another student of his, the late Karl Dake, attempted to measure the cultural biases of the general public by asking them to ex-
press the extent of their agreement and disagreement with various policy and factual statements. Not wishing to disappoint survey researchers or to appear ignorant, respondents generally oblige by expressing agreement and disagreement with a long list of such statements. The problem is that while a few of these expressions may be heartfelt and may reflect true, preexisting and persisting attitudes of respondents, many, if not most, such expressions do not have these characteristics. These are what some political scientists call “top-of-the-head” responses or “non-attitudes.” They don’t mean much, and they don’t measure much. Consequently, they don’t correlate with much either, and, as a result, cannot be used to predict other attitudes, beliefs, and behaviors.

As Stanford professor Paul Sniderman notes, political scientists have found repeatedly over the past several decades, “Ordinary citizens tend to be muddle-headed, i.e., lacking constraint, or empty-headed, i.e., lacking genuine attitudes or both.” In other words, there is little ideological consistency in the political attitudes of the general public, frequently because they don’t have attitudes toward many of the issues about which they are asked on surveys. This general finding has been replicated in the Wildavsky and Dake work, in which we do not find the strong patterns in response predicted by cultural theory.

My potential solution to this problem is that we need to include items in our surveys that allow us to distinguish the more from the less politically sophisticated individuals in the general public. The more politically sophisticated people mimic political elites in that they have genuine attitudes on a range of issues that are coherently organized on an ideological or value basis. For political communication purposes, this will allow us to identify people who will respond to a values-based message.

We also need to measure political sophistication in different ways. There are several different types of political sophistication, and, consequently, several measurements that should be used. The most common way to measure political sophistication is to identify differences in general political knowledge. As Fred Smith likes to point out, you can ask people who their senator is, and half don’t know. The people who can name their senator are more politically sophisticated than those who cannot. There are various measures of this kind that produce somewhat different results. But the idea is to use a measure of general political knowledge to identify people who have some knowledge of national politics.

A second form of political sophistication revolves around the fact
that many people don’t have articulated values, ideologies, or policy positions on a range of issues. Nevertheless, they know who and what they like and don’t like, and they use these cues to figure out what their policy position should be without really understanding the policies at all. People who like President Bush tended to support the war in Iraq more than people who don’t like Bush, for example. We all do this to some extent. We are only knowledgeable about a few items of substance, while for the rest of the issues we look at who is endorsing a policy and who is critical of it. We know whether we like or dislike the endorser or critic, and we can figure out where we stand on a variety of issues with that little bit of initial information. When we include the names of endorsers of certain issues in our surveys, there is much more ideological, partisan, and values-based consistency in issue positions.

We do have issue specialists in the population who know a lot about abortion or environmental issues, for example, but don’t know much about other issues. Issue specialization is a third kind of political sophistication. Instead of expecting people to know a lot about several different issues, we look for ideological, partisan, or values-based coherence on the few issues about which people actually know something. As we will see from Alex Castellanos, Will Feltus, and Don Devine’s discussion of the results of the survey that CEI commissioned for this workshop, the general public’s valuation of various issue clusters is the strongest predictor of their partisan vote.

Finally, there is domain-specific political knowledge. This not only includes people who know more about local than national government, for example, but looks at politics in all areas of social life—all areas of social organization. We engage in politics at work and politics at home, for example. People are living and enacting cultural patterns in their daily lives all across America. Work and home environments are organized along individualistic, egalitarian, hierarchical, or fatalistic lines or in some blend of the patterns. People are familiar with this patterning in many different areas of their lives, even if they don’t know anything about national or local politics. I want to suggest that we can use that familiarity and leverage it by using family-based or work-based metaphors to extend that familiarity into political domains. Politicians, political advisers, speech writers, and communications specialists already do this intuitively. Wildavskian cultural analysis just gives us a way to systematize intuition about appropriate metaphors.

I also urge you to read John Zaller’s book, *The Nature and Origins of Mass Opinion*. Zaller believes that public attitudes on political issues
are a result of the intensity of political communication on these issues, public attentiveness to these communications, and the extent of conflict among political elites on these issues. When political elites disagree along partisan or ideological lines, the public’s response will become ideological as well—with the most politically attentive responding most ideologically. Under these circumstances, you have opportunities to reach the attentive public with a values-based message.

I think, however, that Fred Smith’s idea of piggybacking some of these values-based messages on advertising to which everyone is exposed could potentially reach those people who aren’t paying attention to standard political messages. Perhaps we could even reach some of those fatalistic, apathetic couch potatoes this way.

Finally, I want to suggest a research agenda based on what I just said. First, what I think we should do is utilize a recently created ability to study and continually monitor the political views of different kinds of political sophisticates in the general population. What I’m talking about is a company called Knowledge Networks (www.knowledgenetworks.com), which can access about 40,000 randomly selected, representative U.S. adults on a weekly basis though a WebTV-type interface. The large number of respondents allows us to study the political behavior of subgroups in the population, including the various kinds of political sophisticates who should be most receptive to values-based communications. The WebTV interface allows us to show them political ads and get a true sense of how the population is going to respond, something we don’t obtain with focus groups. Knowledge Networks was created by Stanford University political scientists, but is now being used mostly for product marketing purposes, because that is where the money is. Only a few political and other social scientists have figured out how to use this capability for other purposes. So far as I know, while some government agencies are starting to use this research to evaluate the impact of their programs, politicians and their consultants are not yet aware of this capability and the opportunities it creates for improving political communications. Consequently, there is a real opportunity here for those who act first.

Another capability we need to create is a parallel ability to study and continuously monitor the political views of different kinds of political elites by using the Internet. The Internet makes it cheap. It makes it fast. And it reaches many people. If we construct this right, we’ll create a Nielson-type system for political elites. We have one already for the general public, Knowledge Networks. If we use both systems together, we’ll
be able to study the interaction of elite and public opinion that Zaller discusses. We can then feed that knowledge right back into the political process, figuring out how to shape our message as we go.

If we want a successful communication strategy, we can use these research and monitoring capabilities to understand how changes in elite opinion and changes in public opinion are related. Once we track these interactions over time and see how things translate to the public through various channels of communication, we will learn to which channels the public is responding, and how the public is picking things up. Then, we can construct the communication strategy that best diffuses our values through elite networks and to the intended politically sophisticated public.

THE NATIONAL MEDIA POLITICAL VALUES THEORY

Alex Castellanos

I am a storyteller, primarily in political campaigns. Gradually, as the job has evolved, I’ve become a storyteller for corporate America, too. In the private sector, it is no longer sufficient to make and sell a good product; you must also fight for your right to do so. In those battles, public or private sector, I have concluded that winning is better than losing.

But how do we do that? How do we persuade? How do we inform? How do we succeed as advocates of freedom and competition? After a little study, I’ve learned a few things; first, that there is lot we don’t know. Then I ran into Fred Smith. And he didn’t know the same things. But Fred was asking all the right questions.

I want to share with you some of the work we’ve been doing over the past few years. It is a work-in-progress. It’s a model we’ve been using in campaigns to advance the interests of good candidates, defeat bad candidates and to build a governing consensus for good governing policy. What we seek here is applied science, not pure science. We are looking for a model that is useful, that will help us advance our ideas and help us win.

We began by asking a simple question: how do we lead?

Pick up a newspaper or turn on your TV any morning, and you’ll see how the news media does it. They change the world, right? How do they lead?

Well, it’s not with the good news. They tell us, “The Army is taking too long to get to Baghdad.” Oh my heavens, there must be a problem,
let’s do something about that. “Seniors don’t have healthcare.” There’s a crisis. We have to do something about that. “Seniors don’t have prescription medicines.” Oh, that has to stop. How does the news media lead? They seem to present a lot of bad news every day.

How do political figures lead? With good news? or bad news? President Bill Clinton, in some ways, was one of the best we’ve ever seen at this. “Three thousand kids will start smoking today and one thousand will die,” he’d tell us… not “Let’s regulate tobacco companies.” Bill Clinton was a master at first creating a crisis—on both personal and public levels, of course.

How do we lead? Let’s return to Marketing 101: you don’t sell Excedrin; you sell the Excedrin headache. You don’t sell Wisk; you sell “Ring around the collar,” right? Wrong—if you’re a Republican. If you’re a Republican, you usually do it exactly backwards. Must be union rules.

First, you jump in the pool, then you fill it up. If you are a Republican you usually start every race at the finish line. “Here’s your tax cut,” we tell voters. And they wonder, “What? Why do I need a tax cut?” We skip the joke and go right to the punch line.

David Mamet is a wonderful playwright. He wrote, “The power of the dramatist and of the political flack, therefore, resides in the ability to state the problem.” That is a powerful way to look at our communications mission: it is our job to create the crisis that compels the change. The next step, of course, is “What crisis? What problem?” How are we going to find the right “ring around the collar?” Without the benefit of an academic background, relying on our own political experience and the work of other political consultants on whose shoulders we gratefully stand, we began to look at the real world, how it affects us, and how it has changed politically over the past few decades.

Over a period of about six years, we developed a strategic platform—a model. In academic terms, it is known as a cultural values model for risk management. It helps us understand the changing structure and concerns of the electorate—because the American electorate is radically different than it was just a few short years ago. We are living in a new political era. The old model, the old way of doing things, no longer works.

Once upon a time, only three decades ago, there were two political parties in America: the Democrats and the Republicans. They were different and, interestingly enough, somewhat similar. The difference? One party had money. The other did not. The Democrats were the party
of the working class. The Republicans were the party the Democrats worked for—the party of money and business. Ideology did not significantly distinguish the parties. There were conservatives in both the Democratic and Republican Parties. Class, however, did separate the two. Republicans had a tight little group at its core, the National Review conservatives—the Goldwater/Reagan wing of the party. The Rockefeller Republicans, however, the moderate wing, actually had the money and ran the party—the Rockefellers, Lindsays, Andersons, Fords, and Doles, etc.—otherwise known as the business elite.

The Democratic Party, unlike today, was also an ideological hodgepodge. On the far left, there were ideological liberals, hard-core socialists, unions, and a solid block of ethnic minorities. Closer to the political center, there were the Southern agrarian conservatives—men like George Wallace and Strom Thurmond. To their right, however, you would find foreign policy hawks like Scoop Jackson. In both parties, you would find what we might today call “ideological diversity.” Then the world began to change.

We are all familiar with the process of realignment that has occurred. When did Strom Thurmond leave the Democratic Party? I think it was 1898. No, it was when Barry Goldwater ran for President, in 1964. A political divide began to drive foreign policy hawks, anti-communism, and anti-big government conservatives out of the Democratic Party and into the Republican Party. Around 1968 or so, Southern agrarian conservatives like George Wallace and, eventually, Richard Nixon began to employ the Southern strategy. Race became an issue. The pessimistic, conservative, ideological core of the Republican Party began to grow.

Then, in 1980, the world changed again. A brand new idea occurred within the Republican Party. Something that had never happened before. A Republican candidate actually smiled. What a concept! Ronald Reagan began to spread his message of economic optimism, tax cuts, growth, and everyday pocketbook benefits. Reagan’s powerful and positive message, his new American Determinism, challenged the malaise of the time and the pessimism within his own party. America, he told us, is destined for greatness. Yet, he still appealed to pessimistic, anti-big government, anti-communism conservatives. President Reagan didn’t abandon the dark, conservative core of his party. He added something to it. He built something upon it. And with that construction, the process of ideological realignment was complete and the world looked like it does in Figure 2.5, as it still does today.
This figure is “Alex’s Map of America,” with pictures for the politically hard-of-hearing. I’m sure you are familiar with the clusters represented here. On the far right, you have the cross cluster, representing evangelicals. That encompasses 8, 10, or 12 percent of the electorate, depending where you are in the country. A little closer to the center, but still on the right, is the flag cluster. These Americans like order and hierarchy. They are also conservatives, and are sometimes called “secular moralists.” Those in this cluster hold beliefs very much like the cross cluster, but not for religious reasons. They hold those beliefs for moral reasons. This is the “right v. wrong” crowd.

In the center, we have the money cluster—the cluster of tax cutters, pocketbook voters, and those interested in economic growth. When Ronald Reagan came along, as we’ve noted, he added the tax cutting, economic growth crowd to the dark, conservative core of the Republican Party. He expanded the Republican Party across the center. With Reagan, we began to grow and win and, over the last thirty years, the Republican ability to get votes has grown, point for point, with our ability to own the issue of tax-relief. To use an appropriately elitist metaphor, what Arnold Palmer has given to golf, Ronald Reagan has given to Republicans.

A little to the left of center is the heart cluster, otherwise known as the “care and fair Democrat:” soccer mom, laptop mom, and diner mom are included here. Two-thirds of working women are in this cluster. Lastly, on the far left, the equal sign is the liberal, egalitarian core of the Democratic Party, the cluster that believes not in equality of opportunity, but in “equality of result.”

What issues do the clusters care about? In the cross cluster, they are anti-pornography, pro-school prayer, and strongly pro-life. In the flag cluster, you find the same beliefs, to a great degree, but you also see concern for welfare, crime, drugs, national security, and a balanced budget. Why a balanced budget? Not because it’s about money, but because balancing the budget is a moral issue: it is wrong to spend more
than you take in. The dollar cluster, as we’ve noted, cares about tax cuts and economic opportunity. The heart cluster is focused on education, healthcare, and environmental issues. On the far left, the egalitarian cluster distinguishes itself with its concerns about world poverty and racial justice.

It is interesting to ask voters why they care about certain issues: “Why are these issues important to you?” When you do, it turns out that voters care about certain issues or causes, as you might suspect, because of the big things that are important to them in their lives—the big things they value. And there is the magic word: values. Your values, it turns out, define who you are politically. So when you ask people what issues are important to them, you not only can produce an “issues map.” If you do it the right way, you can produce a “values map.” Though issues may come and go, values are more constant. Bigger. And simple.

In fact, when you look at people’s experiences, living in the real world, it is easy to see them doing just a few simple things: protecting those they love, providing for their families, and caring for others. Protect, provide, and care. That seems to be what we do. That seems to be what is important to us.

From another perspective, we can also use this model to examine gender values. What does Daddy Bear do, on the right side? He protects the family, takes care of them, and locks the doors at night. What does Mommy Bear do on the left side? She cares for the family. What do you do in the middle? Provide so the family can eat. Pretty simple.

Can we make this model more complicated? Absolutely. But we are not trying to. My intent is to make this model as simple and useful as possible so we can communicate and persuade and win. Thus, this is the linear representation of how we, from right to left, “protect,” “provide,” and “care.” I could have saved myself a lot of work if I had just read a little history. A few thousand years ago, Thucydides wrote that there were only three important values: “orthos,” “kerdos,” and “phobos,” i.e., “order,” “self,” and “fear.” Not dissimilar to what we’ve discovered here.

We should also note that there is an apparent hierarchy of values here. If in the dollar cluster, economic issues are not of concern, if you have a paycheck and you are eating, then you are safe to worry a little bit more about where your children go to school, whether you have clean water to drink, or other heart cluster issues.

When you don’t have a paycheck, however, you worry about school tomorrow. Today, you worry about eating. You defer some heart
cluster concerns to dollar cluster worries. Similarly, if you don’t have a paycheck and you are hungry, but your physical safety is threatened by crime or war or other instability, you focus on security. Eat tomorrow, survive today.

However, it appears that though circumstances and concerns may change a great deal, each of us still looks at the world through the self-imposed prism of our social roles. It is our job, no matter the circumstances, to protect, provide, or to care. And our job changes much less and, perhaps, more slowly, than we might think. As an example, let’s look at how different political clusters interpret the events of September 11, 2001. We have all found ourselves around the dinner table, since that tragic day, when someone from the flag cluster said, “Yes, we’ve got to keep this country strong so we can get those bastards, punish them and keep this country safe.” To the flag cluster, September 11 was a threat to our national security. On the other side of the table, however, it has not been unusual to hear someone from the heart cluster approach the event from a different, more feminine perspective. “Yes, thousands of people lost their lives or were hurt on September 11. Gas masks, plastic sheeting, duct tape? What must we do to keep our children and our families safe?” September 11 was a care and fair issue for them.

As we’ve worked with our model in public affairs and political campaigns, we’ve learned a few other things. Both ends of this political spectrum are pessimistic. Both ends are very cranky. On the far right, you have those who think the world is in moral decline. America is going to hell, as did Rome 2,000 years ago, and the world as we know it will end with it. On the far left are those concerned that we are running out of baby seals, that we have a hole in the ozone layer, and, similarly, that the world is going to end. In the middle, however, there is a fountain of optimism. This optimistic cluster values freedom and opportunity. America is a good place, they think. It could be better, but that America is ours to build. So what do we have to do to get across the middle? What do we have to do to build a governing consensus for a candidate, a cause or a policy? Smile, demonstrate optimism, and point to the future.

From the left, Bill Clinton moved across the middle by building a bridge to the 21st century. From the right, Ronald Reagan moved across the middle by championing an optimistic American Determinism, tax-cuts, and economic progress.

It also seems that we can segment this model at least one other way, rural values on the right, urban values on the far left, and suburban values in the center. In the last presidential election, that model divides
America pretty neatly into red-Bush and blue-Gore America. Who knew?

Now that we have a map, what do we do with it? Can it explain the past to us? Can it guide us in the future? Does this map tell us how we got here and can it help us get where we want to go?

Let’s hit the road and check. As we know, the realignment started with Reagan. Reagan built upon the dark core within his constituency, including the cross and flag clusters, to include the dollar cluster. One, two, three: Cross, Flag, and Dollar Sign. Reagan added that third dollar-cluster and won. In so doing, he built a governing consensus that reached across the center. In his reelection campaign, Reagan continued to appeal to the cross, flag, and money clusters, and won again. Things were good for the Republican Party. Reagan ran a third time—well, actually, it was George Bush. People thought it was Ronald Reagan. Unfortunately, we abandoned the Reagan center in 1992. Remember, “Read my lips, no new taxes?” When President Bush trusted the Democrats in Congress to cut spending if he backed off his promise not to raise taxes, we backed away from the dollar cluster, where we were just beginning to set roots. Then, enter Bill Clinton, who saw the vacuum that Republicans left. He seized the opportunity to take the center.

In 1992, Bill Clinton did not run as a traditional “care and fair,” heart cluster Democrat. He ran as a New Democrat. “It’s the economy, stupid,” he said. Clinton was a Democrat who wanted a tax cut for the middle-class. He created the New Democrat, a Democrat who reached across the center by appealing to the equality, heart, and dollar clusters. Of course, the good news for Republicans was that Clinton was not constrained by any commitment to the truth. Clinton’s promised tax cuts turned out to be tax increases. His centrist promises delivered Hill-ary-care, socialized medicine, and a big government agenda. As Clinton backed away from his dollar cluster campaign of 1992, he reached the low point of his presidency in 1994. This time, it was Clinton who left a vacuum in the middle, a void Republicans rushed to fill. Like 1980, 1984, and 1988, 1994 became a Reagan election again. Republicans took control of Congress. Bill Clinton, though not being a very good president, was a terrific politician. He huddled with Dick Morris in the White House, and on January 23, 1996 he declared, “The era of big government is over.” Bill Clinton, again, became a New Democrat. And the old Democratic Party was officially dead.

Clinton’s rejection of the old Democratic orthodoxy was astonishing. “I can give you those tax cuts,” he promised. “We can afford them
now.” Clinton reached across the middle again to the dollar cluster. But he didn’t stop there. Clinton also offered the electorate welfare reform, school uniforms, and 100,000 cops! A New Democrat, reaching across the heart and dollar sectors, to the flag cluster! Bob Dole’s campaign never knew what hit them. Other than complaining, “the Clinton campaign stole our message,” it had absolutely nothing to say. And Clinton, of course, was re-elected.

Then in 1998, we endured the “Monica election.” Republicans stood firmly on the right, campaigning about Clinton and his morality. We left the Reagan center, the dollar cluster, completely vulnerable. There was so much noise that year, however, such loud “Monica din,” that neither side could punch through with a message. This was one vacuum nature did not fill. In the 1998 election, nothing changed.

So let’s evaluate: if this is the way the world looks, how do we win today? What’s the game plan? How do we reach across the middle to build a governing or political consensus? Isn’t it enough to do what Reagan did—speak to the cross, flag, and money clusters? One, two, three: isn’t that the strategy today?

Unfortunately, the answer is no, because the world has changed again since 1988. We no longer live in the America of Ronald Reagan’s era. Ronald Reagan’s America has changed. Industrial America is dying out, as are industrial Americans. There are fewer blue-collar, manufacturing jobs. And fewer Pat Buchanan voters. Add to that the aging of the baby-boom generation—we have more seniors than ever. They are more dependent on government services. The segment of the population over the age of 55 is expected to grow from 55 million to 66 million by 2005.

Additionally, America is becoming more prosperous and more elite. In the highest-income areas, where people make over $100,000 a year, Gore out-polled Bush. If America ever entirely becomes like the Upper East Side of New York, Republicans are in big political trouble. Yet, we are, despite our difficulties, becoming wealthier as a nation.

But the change in America is not limited to age or income. Look around. America is becoming a much more diverse country. In California alone, the Latino vote has doubled, and the Republican share has dropped from one-third to one-fifth. California has become a minority state. In Colorado, Hispanic turnout doubled from 7 percent in 1998 to 14 percent in 2000. When immigrants become citizens, are they lower-income, more dependent on government services? If so, they enter the electorate, more often than not, as Democrats.
America is also becoming better educated. There are now more voters with some college, a college degree, or post-graduate degree, and fewer high school only graduates than ever before. Unfortunately, college educates Democrats. Only life seems to educate Republicans. What that tells us about higher education in America today is a discussion for another day.

There has also been growth in the “new economy” workforce. This new workforce is fiscally conservative, but socially tolerant. You have a laptop. You have a cell phone. You have no healthcare. On whom do you depend for benefits, or to serve as your safety net?

Another change in the composition of our culture and our values: national levels of religious belief spiked after September 11, but are now down to pre-September 11 levels. There are more voters today with no religious preference, and church attendance is dropping. Now there is much debate about where we are headed, but I think we’re starting a New Victorian era in which all the baby boomers who were so self-indulgent in the 1990s are going to become very cranky, strict, and intolerant this next decade. Quite possibly, their religious decline will reverse itself. But, right now, it hasn’t. Until the election of George W. Bush, the base of self-identified conservatives had been shrinking, too.

For all those reasons, and others, America’s political and cultural center is moving to the left, beyond the dollar cluster, making the heart cluster the new political and cultural center. But what’s the biggest change of all?

The biggest change of all is in the role of women in American society. The America of a mere generation or so ago had a different view of the role of women. The wife stayed home, took care of the house, took care of the children, and took care of her husband. A good wife always knew her place. That place is different now, I’m told.

The sexual revolution has succeeded and women have “come a long way, baby.” Data tells us that income for women has grown while income for men has declined over the decade of the 90s. Today, economists report, that women account for 70 percent of all consumer spending. With economic power comes political and cultural power. We live in a much more feminine society; a much more egalitarian, care-giving society than we did just a few decades ago. And in politics, we all know the “Golden Rule:” she who has the gold makes the rules.

In today’s post-Reagan culture, the road is longer for conservatives. Republicans and advocates of freedom have to travel further across the model than ever before.
Can it be done?

Yes, it can. And the lessons of the past instruct us once more. Ronald Reagan didn’t abandon his conservative base. He built upon it. In our post-Reagan Era, we must build upon what Ronald Reagan left us. Step One: we must inspire our conservative base, the cross and the flag, our dark core. We must protect the cluster that values hierarchy and order. Step Two: we must rebuild and nourish the old Reagan coalition, by offering tax cuts, optimism and economic growth. Step Three: we must walk into the future. We must drive a wedge into the heart cluster.

How do we do that? How do we split the “care and fair” vote? And how do we do it, running against New Democrats, who always have a tax cut in their pocket and a flag on the stage to boot?

The good news is that it is not that hard at all. In fact, it has already been done. The first time I saw it happen was in the welfare reform battle. In that battle, one of our clients, former Senator Phil Gramm (R-TX), used to make the moral argument. He said it was morally wrong for welfare recipients just to ride the wagon; they ought to get off the wagon and help the rest of us pull. We scored some points, but not enough. Then we began to talk about how expensive welfare had become. We made the dollar cluster arguments. “Welfare,” we told Americans, “costs 5 trillion dollars, more than it did to win World War II.” It meant we had to pay higher taxes. We made more progress. But not enough.

When did we win the welfare reform battle? When the public accepted that welfare wasn’t just a moral or economic issue of interest to cold-hearted Republicans. Welfare was a “care and fair” issue, because it was hurting the very people it was trying to help. “There’s a 14-year-old mom in an apartment not far from here with five kids,” we told Americans, “no father, no hope, and no future. Welfare did that. We did that. That’s what the welfare issue is all about. Is that who Americans are? Don’t Americans care?”

We traveled from the cross and flag clusters, through the dollar cluster and conducted the debate inside the heart cluster. We became “New Republicans” with a strategy to challenge “New Democrats.” President Bush is that kind of New Republican, in my view. Not because he’s seen a model, but because he is genuinely a “compassionate conservative,” the living embodiment of the next generation of Republican. President Bush is a post-Reagan Republican.

The first commercials we were privileged to make in the last Bush campaign reached into that heart cluster. We touched the third rail of
Social Security reform and emphasized more personal control and better benefits for the future. The second issue the commercials addressed was another care and fair issue: education. And our challenge today, whether in corporate public policy campaigns or candidate-oriented political campaigns, I would submit, is to institutionalize among ourselves what comes naturally to President Bush: how do we evolve into “New Republicans” and compassionate conservatives today?

Here’s one opportunity: school choice. Why don’t we have school choice today? Well, there’s a reason. Ask Americans if they support “school choice,” giving parents taxpayer-funded “vouchers” to send their children to private or religious schools instead of public schools? The percentage, in one recent survey, is 53 percent for and 42 percent against. That’s a slight winner. But nothing to set the house on fire. And the “voucher” word is radioactive among the heart cluster voters on which political success depends. Now look at the same issue, not from the moral point of view, but from the civil rights perspective of the heart cluster. Ask Americans if the parents of every child, rich or poor, regardless of race, creed or color, should have equal opportunity to choose the best education for their children.

School choice is Excedrin. “Equal opportunity in education” is the Excedrin headache. The latter compels the former. “Equal opportunity in education” is an idea whose time has come.

And that approach is illustrative of our opportunity now. It is our job to find those things that advance and explain freedom to that egalitarian cluster, to that compassion cluster, to that care and fair voter. We know the language of compassion and caring and fairness works, along with civil rights language. But there are other opportunities as well.

For example, when we first started the battle on tort reform many people were talking about the lawyer tax. They were making a dollar cluster argument. We started gaining ground in the battle against abusive, out-of-control lawsuits, however, not by abandoning the economic argument, but by taking it a step further. There are real victims out there who are being denied justice because the courts are clogged with junk cases and greedy trial lawyers making bazillions. When we began to let the victim’s face illuminate the reckless growth of unchecked legal power, we began to make political progress. Tort reform is not our only opportunity, unfortunately, to point out that freedom is not only morally right, freedom is not only economically superior, but that when old-slow, centralized big-government power fails, it hurts real people and
causes real pain. In education, health care, or business, the evidence of liberalism’s failure is piled up like bodies around our feet.

Another avenue to explore is the contrast between what we might describe as the more “natural” process of the “invisible hand” and the left’s machine-like, one-size-fits-all values born of the industrial age. They believe in industrial-age government, yet other old, industrial-age institutions, whether American manufacturing or the former Soviet Union, have had to transform themselves or perish. We’re in a new era of bottom-up communications and production. The embodiment of it is the Internet. Perhaps it’s time we explained that we are the nature lovers of economics and our adversaries are the economic clear-cutters of the past.

What we must remind ourselves, amidst constant attacks from the left and news media, is that we are the good guys. Look around the rest of the world if you want to see what American capitalism has accomplished. “Compassionate conservatism” and “compassionate capitalism,” as we should call it, is not a wussy, “we-love-puppies, too” strategy. It’s the opposite. It’s an attack strategy. A strategy that informs people that not only has liberalism hurt people morally, not only has it destroyed people financially, it has also ruined real lives and caused real pain. Freedom is the sole alternative.

Freedom is not only the moral destiny of mankind (flag and cross) and a superior source of progress (dollar), it is the greatest force for good in all of history (heart), a power that has helped more people than anything else the world has ever seen.

Our adversaries have no arguments to rebut us. They have lost the war of ideas. They fight for power and not ideas. That’s why they are exclusively and bitterly opposing the current administration on everything. They are marginalizing themselves and shrinking their party. The smaller they become, the more extreme they must be to keep the affections of their shrinking base. The circle grows smaller. They are devouring their own tail.

A few on the anti-business side get it: look at the ads that the Sierra Club was running in late 2002 featuring Senator Bob Kerrey (D-Neb) shown in Figure 2.7. As our side communicates from right to left (from cross and flag, to dollar sign, and then heart clusters) the Sierra Club is urging Americans to buy “cars that save gas and the lives of America’s armed forces.”

They are traveling across our model from left to right! Protecting
the environment is no longer a care and fair argument. It’s a moral argument, designed to appeal to the patriotic flag cluster. One Sierra Club ad even invokes prayer: “God gave us this... beautiful land, and it’s our charge to preserve it.” Now, we’ve seen it all: the anti-religious left using religious arguments to score environmental points! That’s the best they have.

Just a few days ago, we completed a public opinion survey to test the model and learn more about some of these arguments. What we learned will be explored in Chapter Three.
We’re moving from the Wildavskian conceptual framework to its application in survey research. Incidentally, this framework is not new or unique. Myers-Briggs has a similar framework. When you research almost every attempt to summarize people’s attitudes, you find this fourfold way (individualist, hierarchic, egalitarian, fatalist). That doesn’t mean it’s always true or usable, but it does suggest that it captures something inherently valuable. This chapter focuses on National Media’s Values Survey results, and how the data can inform communications strategy.

**In the Beginning… How and Why We Began**  
*Will Feltus & Alex Castellanos*

We went into the field with this survey of 805 Americans on Saturday, March 29, 2003, during the Iraq War, and you’ll see that the war influenced people’s opinions somewhat. But this is not the typical “How are things going?” poll, or the “Who are you going to vote for?” poll.
Instead of focusing on current issues, our questionnaire seeks to measure basic political beliefs and values. The complete survey questionnaire appears in Appendix A.

We had respondents rate a number of institutions and public figures on a 0 to 100 “feelings thermometer,” with 100 indicating a very warm, favorable feeling and 0 indicating a very cold, unfavorable feeling. This scale is a little more interesting than just a simple favorable/unfavorable response. We included institutions and people who we thought would be polarizing figures and who would generate strong feelings.

President Bush, who was at an Iraq war popularity peak during the time of the survey, leads the list with an average score of 67. Saddam Hussein got an average rating of just 4. Overall, Americans gave higher scores to the faces of the Republican Party—Bush, Frist, and Reagan—than they did to the faces of the Democratic Party—the Clintons, Kennedy, and Daschle (See Figure 3.1).

We wanted to look for patterns in how voters feel about these public figures. We did that using a statistical procedure called factor analysis. The computer looks for patterns and then spits out a factor for each pattern it finds. We look at each factor and figure out what it

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**Feelings thermometer ratings:**
How do you feel about (name) on a 0-to-100 scale where
100 means you have an extremely warm, favorable feeling
and 0 means an extremely cold, unfavorable feeling?

<table>
<thead>
<tr>
<th>Name</th>
<th>Average 0-100 Score</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>George W. Bush</td>
<td>67</td>
<td>0%</td>
</tr>
<tr>
<td>Ronald Reagan</td>
<td>65</td>
<td>1%</td>
</tr>
<tr>
<td>Bill Frist</td>
<td>55</td>
<td>61%</td>
</tr>
<tr>
<td>Bill Clinton</td>
<td>47</td>
<td>1%</td>
</tr>
<tr>
<td>Teddy Kennedy</td>
<td>47</td>
<td>5%</td>
</tr>
<tr>
<td>Hillary Clinton</td>
<td>46</td>
<td>1%</td>
</tr>
<tr>
<td>Ross Perot</td>
<td>43</td>
<td>5%</td>
</tr>
<tr>
<td>Rush Limbaugh</td>
<td>42</td>
<td>10%</td>
</tr>
<tr>
<td>Tom Daschle</td>
<td>42</td>
<td>24%</td>
</tr>
<tr>
<td>Simon from American Idol</td>
<td>41</td>
<td>43%</td>
</tr>
<tr>
<td>Jesse Jackson</td>
<td>37</td>
<td>2%</td>
</tr>
<tr>
<td>Rosie O Donnell</td>
<td>37</td>
<td>6%</td>
</tr>
<tr>
<td>Saddam Hussein</td>
<td>4</td>
<td>1%</td>
</tr>
</tbody>
</table>

National Media Survey, N=805 Registered Voters, April 2003

**FIG. 3.1:** Table A
means, if anything. In this case, there are two factors and we can easily identify them.

As shown in table B, (See Figure 3.2), Factor 1 is clearly the liberal factor, with Democratic public figures “loading” onto the factor with positive scores while Republican public figures load in factor one with negative scores. A simple interpretation of factor one is that Bush and Limbaugh are the biggest bogey-men for liberals. Factor 2 can be identified as the conservative factor. The bogey-men here are the Clintons, edging out the older-generation Kennedy and Jackson as the Democrats that conservatives now love to hate.

We also looked at Ross Perot, who loads positively on both factors. Voters still can’t figure him out, and Perot has it both ways. If Perot is a populist, then this data is telling us that there is a populist dimension that cuts across both the left and the right of the political spectrum.

We also asked respondents to give us feelings thermometer ratings of organizations and institutions (See Figure 3.3). The survey was conducted March 29-April 1, 2003 at the height of public support for the war in Iraq. As a result, the poll found that anything having to do with the federal government was very popular. Most unpopular are trial law-

<table>
<thead>
<tr>
<th></th>
<th>Factor 1</th>
<th>Factor 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillary Clinton</td>
<td>.81</td>
<td>-.33</td>
</tr>
<tr>
<td>Teddy Kennedy</td>
<td>.79</td>
<td>-.22</td>
</tr>
<tr>
<td>Tom Daschle</td>
<td>.78</td>
<td>-.14</td>
</tr>
<tr>
<td>Jesse Jackson</td>
<td>.76</td>
<td>-.09</td>
</tr>
<tr>
<td>Bill Clinton</td>
<td>.75</td>
<td>-.39</td>
</tr>
<tr>
<td>Rosie O’Donnell</td>
<td>.66</td>
<td>.02</td>
</tr>
<tr>
<td>Ronald Reagan</td>
<td>-.18</td>
<td>.82</td>
</tr>
<tr>
<td>George W. Bush</td>
<td>-.34</td>
<td>.75</td>
</tr>
<tr>
<td>Rush Limbaugh</td>
<td>-.34</td>
<td>.71</td>
</tr>
<tr>
<td>Bill Frist</td>
<td>-.08</td>
<td>.66</td>
</tr>
<tr>
<td>Ross Perot</td>
<td>.42</td>
<td>.54</td>
</tr>
</tbody>
</table>

National Media Survey, N=805 Registered Voters, April 2003
Feelings thermometer ratings of organizations and institutions

- The United States of America
- The U.S. military
- The Boy Scouts
- Americas hospitals
- Public schools
- Business entrepreneurs
- The federal government
- Environmental organizations
- Womens rights organizations
- The Republican Party
- Evangelical Christians
- Labor unions
- The Democratic Party
- The United Nations
- NAACP
- The national news media
- Government welfare programs
- Big American corporations
- Pharmaceutical companies
- ACLU
- Peace activists
- Hollywood ent. industry
- Personal injury trial lawyers

National Media Survey, N=805 Registered Voters, April 2003

FIG. 3.3: Table C
A factor analysis of thermometer scores for the institutions and organizations yielded three distinct factors (See Figure 3.4). Again, the first two factors are clearly liberal and conservative. Traditional Democratic constituencies all load most strongly on Factor 1, including Hollywood and the news media. Business and evangelical Christians load with the Republican Party on Factor 2. Voters have a clear idea of who belongs on which team. There is a third factor that we can label as USA. Here we see the military, the federal government and, interestingly, the Boy Scouts.

We asked a series of questions designed to measure the Wildavsky values (See Figure 3.5). We tried to keep the questions on this part of the survey very simple. We can quibble about the wording, but the phrasing clearly reflects the values of individualism/freedom, egalitarianism/caring, and hierarchy/order.

Respondents were scored from 0 to 5 on each of the three value dimensions (See Figure 3.6). For example, a score of 5 on hierarchy would mean that the respondent made the hierarchical response every time, and 0 would mean the respondent indicated no hierarchy in any response. As the scores in Figure 3.6 show, very few respondents scored

---

**Factor Analysis - Organizations and Institutions**

<table>
<thead>
<tr>
<th>Institution</th>
<th>Factor 1 Liberal</th>
<th>Factor 2 Conservative</th>
<th>Factor 3 USA/Flag</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACLU</td>
<td>.78</td>
<td>.06</td>
<td>-.20</td>
</tr>
<tr>
<td>The Hollywood entertainment industry</td>
<td>.74</td>
<td>.18</td>
<td>.10</td>
</tr>
<tr>
<td>The United Nations</td>
<td>.74</td>
<td>-.05</td>
<td>-.01</td>
</tr>
<tr>
<td>The Democratic Party</td>
<td>.73</td>
<td>-.17</td>
<td>.11</td>
</tr>
<tr>
<td>Women’s rights organizations</td>
<td>.72</td>
<td>-.15</td>
<td>.06</td>
</tr>
<tr>
<td>Peace activists</td>
<td>.72</td>
<td>.09</td>
<td>-.32</td>
</tr>
<tr>
<td>NAACP</td>
<td>.70</td>
<td>.07</td>
<td>-.16</td>
</tr>
<tr>
<td>Environmental organizations</td>
<td>.70</td>
<td>-.08</td>
<td>.00</td>
</tr>
<tr>
<td>Personal injury trial lawyers</td>
<td>.57</td>
<td>.38</td>
<td>-.03</td>
</tr>
<tr>
<td>Labor unions</td>
<td>.57</td>
<td>-.02</td>
<td>-.01</td>
</tr>
<tr>
<td>The national news media</td>
<td>.56</td>
<td>.27</td>
<td>.38</td>
</tr>
<tr>
<td>Big American corporations</td>
<td>.05</td>
<td>.75</td>
<td>.29</td>
</tr>
<tr>
<td>Pharmaceutical companies</td>
<td>.16</td>
<td>.71</td>
<td>.17</td>
</tr>
<tr>
<td>Business entrepreneurs</td>
<td>-.03</td>
<td>.57</td>
<td>-.02</td>
</tr>
<tr>
<td>The Republican Party</td>
<td>-.32</td>
<td>.52</td>
<td>.41</td>
</tr>
<tr>
<td>Evangelical Christians</td>
<td>-.12</td>
<td>.44</td>
<td>.28</td>
</tr>
<tr>
<td>The United States of America</td>
<td>-.05</td>
<td>.07</td>
<td>.76</td>
</tr>
<tr>
<td>The U.S. military</td>
<td>-.13</td>
<td>.15</td>
<td>.74</td>
</tr>
<tr>
<td>The federal government</td>
<td>.24</td>
<td>.29</td>
<td>.55</td>
</tr>
<tr>
<td>The Boy Scouts</td>
<td>-.06</td>
<td>.26</td>
<td>.48</td>
</tr>
</tbody>
</table>

*Factor Loading Scores*

National Media Survey, N=805 Registered Voters, April 2003
Questionnaire Items to Measure:

1. Egalitarianism/Caring
2. Individualism/Freedom
3. Hierarchy/Order

19. When it comes to political issues, which one of the following two goals is more important to you personally, if you had to choose just one?
   2. Protecting the freedom of the individual
   1. Caring for those who need help

20. Which of these two is more important to you:
   3. Maintaining order and stability in society
   2. Protecting the freedom of the individual

21. Finally, which of these two is more important:
   1. Caring for those who need help
   3. Maintaining order and stability in society

65. Which of these three statements do you think is most important, if you had to choose just one (ROTATE)
   3. Children must be taught to respect their parents and proper authorities.
   2. Children must be taught to work hard and make it on their own.
   1. Children must be taught to care about and be fair to others.

66. Which one of these three statements do you think is most important? (ROTATE)
   3. People should have more respect for the traditional way of doing things.
   2. People should be allowed to do things their own way.
   1. People should be required to give up doing some things, if that might help the public good.

67. And, which one of these three statements do you think is most important? (ROTATE)
   3. Government should maintain an orderly society.
   2. Government should stay out of individuals’ lives.
   1. Government should provide for those who can’t provide for themselves.

FIG. 3.5: Table E
a 4 or 5 on any of the values dimensions. There are not many Wildavsky “purists.” Instead, most voters carry blends of the three values.

Next, we look at the relationship between the value scores and reported partisan voting (See Figure 3.7). Our caring and order dimensions are related to whether a person tends to vote Republican or Democratic, but, as shown in the following graph, our freedom dimension appears unrelated to partisanship.

The higher your order score is, the more likely you are to vote Republican. The higher your caring score is, the more likely you are to vote Democratic. The cross-over between the caring and order lines occurs to the right of the center. This is consistent with the political behavior of Republican candidates who use “caring” issues such as education, health care, etc. to reach ticket-splitters and create a majority.

While caring and order have their expected partisan correlates, our freedom line is flat and unrelated to whether you vote Republican or Democratic. Why is that? One explanation might be that our questionnaire simply did a poor job of measuring freedom. But the more likely explanation is that freedom is a value shared equally by Republicans and Democrats, although it probably means very different things for them. For Republicans, freedom could mean freedom from government inter-

FIG. 3.6: Table F
**FIG. 3.7: Table G**

Party Voting Behavior vs. Value Scores:
Our definitions of Caring and Order are clearly related to partisanship but our Freedom is only weakly related.

National Media Survey, N=805 Registered Voters, April 2003

**FIG. 3.8: Table H**

Value Scores and Thermometer Ratings of Democratic Political Figures:

National Media Survey, N=805 Registered Voters, April 2003
vention in their economic lives, such as raising taxes to pay for social programs. For Democrats, freedom could mean freedom from government intervention in their moral lives, such as legislated constraints on abortion and same-sex marriages.

While voter freedom scores are not a good predictor of voting Republican or Democratic, freedom values are correlated with how voters feel about Democratic political figures such as Kennedy and the Clintons. But, as you can see from Figures 3.8 and 3.9, freedom scores are not related to feelings about Republicans such as Bush and Reagan.

Voters with the highest freedom scores are most likely to give the lowest thermometer ratings to the group of Democratic public figures. Voters with the lowest freedom scores give these Democrats very favorable ratings. We, therefore, would expect the reverse to be true for feelings thermometer ratings of Republican political figures. But this is not the case. As the graph shows, there is no relationship between our freedom score and perceptions of Republican public figures. It appears that voters with the highest freedom values are “punishing” Democratic figures without “rewarding” the Republicans.
When I began my career, I had a theory that if you have environmental effects that influence your values and interact with the structure of the political system, you can construct other groups, organizations, and so forth. This procedure is how values become policy demands in the political system, and how the political system, in turn, shapes the environment that influences value, and so on. This is the basic political science model. Initially, my colleagues and I didn’t know very much about the differences between the two categories of values and opinions or that there’s something in the middle called attitudes. We looked at the data from a survey we conducted with reference to these categories.

Figure 3.10 comes from a 1972 book of mine called *A Political Culture of the United States*, and it’s what I call the traditional values model. Basic values were identified by looking at all published public
opinion polls from 1935 to 1970, and finding things about which people tended to agree. These were put into academic categories. So in that box you’ll see a bunch of values.

On the question of public opinion, we used a poll that breaks down who should do medical care, who should take care of the aged, who should take care of the unemployed, who should take care of housing. If you ask the question a certain way and you give the choices of individual family, local government, state government, national government, and private groups, no choice gets anywhere close to a majority. My basic conclusion was that I don’t think public opinion has a lot to do with public policy. This finding led me to shift from analyzing public opinion to analyzing values in 1972, when I came up with the model looking at basic values.

Importantly, from 1935-1982, about three-quarters of the American people supported all these fifteen different values. There was support across the board for conservative values about the institutions of government and for some major values, like home, liberty, political equality, property, achievement, belief in God, religion, and altruism (See Figure 3.11).

What kind of conclusions can be drawn from this? My conclusion is that we had New Deal public policy and a very old or traditional values system from the 1930s until today. I only tracked them formally up to 1982. Ronald Reagan came along and said, “God, family, freedom, neighborhood, work,” which was a slogan I gave him. I was Deputy Political Strategist for Reagan in 1980. I took what I thought were the summary values I got out of my study and put them together as a starting point and we did pretty well with that model. Reagan won and changed policy to a reasonably large extent, so that’s the beginning of these values having some impact on public policy. The percentage of GNP spent on domestic policy went down from 17.9 to 16.4 percent. That’s a lot of money and a big effect. The Republican Congress then came in, made some changes, most of which have evaporated since. My conclusion is that, although policy changed, mass values stayed pretty much the same.

Aaron Wildavsky introduced me to a new model he developed with Mary Douglas. It really intrigued me because it is practical and made a lot of sense in trying to relate things to policy. Figure 3.12 shows the basic four-square, or four-quadrant structure of the Wildavsky model. I would point out that the term libertarian, to me, is something that covers both individualists and the egalitarians. I think that’s why the
freedom issue is flat on the statistics in this poll because I think you do have to break it into the two different points of view.

One of the things that intrigued me about Wildavsky is that he calls the Republican coalition the individualist and the deferential. I call it deferential, by the way, rather than hierarchical. Wildavsky himself uses both terms for it. Some of the things that Alex Castellanos proposes make me think that maybe that isn’t the best word either, but I clearly don’t think hierarchical is the right term because statist egalitarians are also hierarchical. I think hierarchical could be used as a term that connects the deferential and the egalitarian.
The numbers you see on the model are the percentages of people in each of these categories. While working with the Republican National Committee, I took a study done by the Pew Foundation for the People and the Press and assigned people to the categories. I came up with 34 percent of respondents in the individualist category, 27 percent in the egalitarian category, 22 percent in the deferential category, and 17 percent in the fatalist category. These are very rough estimates and they may change over time. I don’t even remember what year I came up with the numbers, but I think the Wildavsky model does pretty well in fitting these people into categories and putting political figures into the boxes. The Wildavsky model made a lot of sense to me in the practical world of politics, and I use it to try to figure out what to do in political campaigns.

I used to teach statistics at the University of Maryland, and I finally, after about ten years, decided the world is ordinal and not ratio or integral. When looking at this data, there are three types of questions that were asked on the survey. One has the three-value contrast. There are no questions that have all four of the Wildavsky categories represented.

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**FIG. 3.12: Wildavsky/Douglas Values Model**
I would argue that this is one of the problems with this survey. Again, I give National Media great credit doing it. It’s very good. There are some good reasons not to use fatalists as a factor. There are very few fatalists who vote, for example. In any event, there’s a three-value contrast, e.g., question 67 (See Appendix A for questionnaire). There are two-value contrasts, e.g., questions 19, 21, and 66, and there are what I would call multiple combination questions, e.g., questions 47, 49, and 65.

I looked at whether the questions either correlate with the Wildavsky cultural types respecting party vote, or whether they related to the issue model that Alex just explained to you. These two analytical questions turned out to have some relationship to each other. With respect to Wildavsky, I used question 47 as a moral right and wrong question: do you think that people individually determine right and wrong, or are the definitions of right and wrong the same for all? Does everyone have the same moral culture? The Wildavsky question differentiates cultural types and this right and wrong question only weakly correlates. The Wildavsky model does, however, correlate with partisanship: Republicans think that government should maintain order, while Democrats believe that the government should care for people. Right and wrong correlates with conservative and liberal issues. The value model actually has some interesting findings.

The National Media model does well, but I think if we could get a four-square way of asking about Wildavsky’s cultural types rather than only asking about three, I think we could do it better. We might not even have to ask about pure fatalism, but I think it’s something along that line because the data clearly show that freedom needs more exploration. There are two dimensions to freedom that we’ve got to separate out if we’re going to make an accurate model.

Even looking at the best correlations, there’s very little connection between public attitudes and public policy. That is the conclusion I came to in the first book I wrote with Aaron Wildavsky, *The Attentive Public*, more than thirty years ago. I still think that’s true today.

There is, however, an important dimension to the public. First, about 50 percent of the public doesn’t vote. How important is it to measure their attitudes and opinions and values? I don’t think it is very important. Why waste time on it? The voting public is 50 percent, and they obviously have some meaning.

If you’re communicating a message, the people have to understand the message. The people who pay attention with any regularity are only about 25 percent of the public. I have, however, noticed that this per-
percentage is higher in this poll; probably the war encourages many more people to watch television and pay attention to news in general. I think in a regular period you’ll see it’ll go back down to around 25 percent. Those who both pay attention and are politically active are even fewer in number. You have to talk to the people who mobilize others, including party leaders and the people who actually make policy, if you are talking about policy. If you’re talking about voting, you have to talk to people who vote. If you’re talking about getting a message across, you have to talk to people who pay attention to politics. If you’re talking about influencing policy, you have to get somewhere near the policymakers.

The most important audience goes from the top of that scale to the bottom of the scale (See Figure 3.13). What do the polls do? The polls go from the bottom of the scale up to the top of the scale. This creates knowledge problems. You have question problems here. If you ask the question in a different way, you’re going to get a different conclusion. For elites, you can change the wording without changing the idea. You ask the question differently with the masses, and you get a different answer.

We use the most likely voter as a way to try to find at least the 50 percent mark, but the problem is people lie in their answers. We know 50 percent go out and vote, but 90 percent of them say they voted. So, it’s very tough. Zogby only surveys likely voters, which I think is a good strategy, especially for those in policy because presumably they don’t want to question non-voters. Maybe non-voters do influence policy, but I doubt it.

I think the attentive public is something else we need to look at. We can over-sample the mobilizable public and get some reliable information. We even talked about regular surveys of leaders and policymakers. I’d be very concerned about two issues there: whether it could be timely enough to be useful in creating policy and whether it’s reliable. One thing I know after working twenty years with politicians, is that they lie too.

With respect to making the message effective: mass beliefs and elite beliefs need to be distinguished. For the mass public, if it’s close to where they live, it’s clear to them. If it’s abstract, it’s foggy. Things that are close, like personality, matter. You saw those beautiful factor scores presented earlier when it’s based on people. People know people. They understand them. They can deal with that. People can also deal with issues that are reasonably presented to them. That’s why, in my opinion, the National Media model works so well.
Elite beliefs are almost the opposite. Abstract beliefs are clear to them.

The point is, the survey respondents are inconsistent. I would say the reason why they are inconsistent is because of the public. The reason they don’t know things is because it’s rational for them not to. They are rationally ignorant. Marris, et al. say that only 14 percent of the people fit the pure Wildavsky model, and that makes a lot of sense, because that’s almost the same percent that we traditionally say is the mobilizable, attentive public.

In conclusion, I think the Wildavsky-Douglas model is going to be more effective for elites than it is for the public, but I think it’s been pretty effective with the public, too. I think we still need to test this at different levels of political activity, going up that scale and down that scale, that triangle scale. We need to look at demographic groupings.

On the political side—and this is the most important question to me—is the Republican coalition individualistic and deferential, as Wildavsky postulated? If it is, I think that has some great implications as to whether we reach out to the egalitarians or we reach out to the deferential, assuming that most of us are individualistic.

You need to maximize the base as well as reach outside, but I think that is a potentially difficult and dangerous business. When you start reaching, you worry about losing your base.
Albert Einstein said that everything should be made as simple as possible, but no simpler. Now, I’m no Einstein, and communications is hardly theoretical physics, but, as there are laws in physics, there are laws in communications, and it’s important to acquaint yourself with those laws as you proceed. I’m going to argue that a communications plan has a very simple structure. It contains two equally important components. One is a message that is persuasive to the audiences that matter to you, and second is a means to deliver that message.

**The Message**

Let’s look at an example. As you saw with Fred Smith’s chemical ad, if you don’t have a persuasive message, it doesn’t matter how effectively you deliver it. They spent millions of dollars on an ad that communicated a message that was ultimately harmful to their aims. On the other hand, if you lack the second component of a good communications strategy, a means to deliver your message, it doesn’t matter if you have a persuasive message. You see the following situation all the time; people who have a great message and put up a website, thinking they’ve devel-
oped an effective mass communications plan. Perhaps 25,000 people have seen it. Or they spend their time speaking to groups of fifty people around the country, thinking they have a mass communications strategy and that they are driving a message. Well, if they are speaking to only a few hundred people, they are not effectively communicating their message—it will have no real impact.

You’d be surprised to find out the number of people calling themselves “communication specialists” who don’t understand this very basic principle. You must have a persuasive message and a means to deliver it. If you don’t have both, you don’t have a communications plan. You also need to ask yourself, what if people are persuaded by your message? Is that enough? Do you need them to act a certain way based on the belief you imparted? That nexus cannot be taken for granted.

For example, Republicans believed that once they proved President Clinton was indeed a philanderer and a congenital liar, people would stop voting for him. In fact, only Republicans didn’t vote for him on that basis, and they weren’t going to vote for him anyway. Democrats and Independents, for the most part, didn’t care if he played around or lied.

The Republican Party committed a common and dangerous pitfall in communications, which is a projection of your own values onto your target audience. You can’t assume that your target audience thinks as you do. They may have very different values.

So, there are really only two ways to deliver a message. One is through earned media. The only way to obtain earned media is to do or say something and hope that what you do or say gets picked up. There is a science and art to how you get the media to take your bait. But you must do or say something that is worth media attention.

The second possibility is paid media. Of course, the only way you get paid media is to buy it. Now, one might add that there’s something called “buzz,” or word of mouth, but that’s generally a by-product of either earned or paid media.

THE AUDIENCE
You also need to consider your audience carefully from another perspective. In particular, you need to ask whether the goal is to reach a significant number of eyes and ears, or a small number of significant eyes and ears. In other words, if you need to reach an elite audience, it could be a very small audience, maybe a few policy makers in the State Department or the National Security Council. Or do you need to reach the general public and persuade them? Or do you need to do both? Do you need to
communicate the same way to both? Probably not.

A sophisticated elite audience is going to respond differently from a generalized audience. So you need to understand what audience you need to reach and convince to ensure the success of your mission. You have to keep returning to these questions: What is my mission? What is my goal? What is the strategy for reaching that goal and what tactics can I employ in order to support that strategy? How do you know whether a message is persuasive? Well, both polling and focus groups can help, if you have skillful pollsters and focus group leaders. But you can’t just assume that all of them are skillful because many are not.

It’s also worthwhile to have some grounding in the basic psychological principles of persuasion and influence. One useful way to approach the subject is to recognize that virtually every human being has interests and values. Now, you can appeal to your audience’s interests by saying, “This will be good for you; therefore, you should support it, buy it, go for it.” Or you could appeal to your audience’s values by saying, “This is something you believe to be good; therefore, you should buy it, support it, go for it.”

Even better, of course, is to appeal to both interest and values simultaneously because when your values and interests intertwine, you are likely to be convinced. An example might be a proposal for a tax cut on widgets. If you’re a widget maker or a widget consumer, and I say this tax cut is going to save you money, you’ll be inclined to support it because it’s in your interest. But if I say this tax cut will mean more good jobs in the widget making industry for the poorest Americans in need of such jobs, that may appeal to your values. Now, if I say this tax cut will do both, I’ve now appealed to your interests and your values, making probably the most persuasive argument one could make.

As you know from previous presenters, a very important theorist in this area was Aaron Wildavsky, who made the case that there are different sets of people holding different sets of values. You need to recognize the psychological character of these disparate audiences and what values they hold before you attempt to construct the message to persuade them.

Another interesting thinker in this area is Robert Cialdini, whose book, *Influence: The Psychology of Persuasion*, I found very useful. Cialdini is a psychologist who writes from a marketing perspective. But much of what he has to say applies equally to communications specialists. In particular, he argues that there are six fundamental principles that direct human behavior in this area. It’s a very broad thesis,
but all of these principles are applicable to crafting an effective communications strategy.

PRINCIPLES
The first principle is consistency—once we have made a choice or taken a stand, we are inclined to keep that commitment and to make choices that justify that decision. People like to make up their minds about an issue because once they have done so, they are spared the labor of having to think about it in the future. As the English artist and writer Joshua Reynolds noted, “There is no expedient to which a man will not resort to avoid the real labor of thinking.” So, for example, if you know you believe in saving children’s lives, and I tell you that children are less likely to be hurt or killed in SUVs than in any other kind of vehicle, I’ve probably gone a long way toward convincing you that SUVs are not so bad.

The second principle is reciprocity. Most people in western cultures feel an obligation to repay a debt or a favor, or make a concession to someone who has made a concession to you. Think about how this operates; you’re at an airport and a Hare Krishna gives you a flower. You accept the flower and say, “Thank you.” Then he says, “May I have a dollar?” Now, even if you didn’t want that flower, even if you know you are going to throw it away in the next garbage can, you feel in your gut a desire, a need, an impulse to give a dollar to that person because of the principle of reciprocity.

The third principle is that of social proof; we tend to believe in the collective knowledge of the crowd. We look to the actions of others to decide on proper behavior for ourselves, especially when we view others as similar to ourselves. So this is why manufacturers will say, “Crest is the best selling toothpaste in America.” I mean, so what? Why do you care? That’s great for them, but what does it mean to you? Well, what it’s supposed to mean to you is that you are going to figure, “Well, if all those other people are buying it, they probably know what they’re doing, and I don’t need to research this any further. They are probably right. I’ll go with them. I’ll buy Crest, too.” This line of thinking keeps you from having to think about it. It’s a shortcut.

It’s also why protesters hold demonstrations. If 100,000 people had marched on Washington to end the war in Iraq, it would have been meaningless as a reflection of the sentiment of the general population, but that may not have registered with people watching on TV. They would have seen a big crowd and somehow perceived psychologically that there was a collective wisdom against the war.
The fourth principle is authority. It’s very well known; we simply tend to believe those who are billed as experts, irrespective of whether they are knowledgeable about the subject. They may have a Ph.D., or a title like ambassador. The key is that the audience believes that they have authority.

The fifth principle is one of liking. Clarence Darrow said that the main work of a trial attorney is to make a jury like his client. If the jury likes the defendant, that person is more likely to be exonerated, whatever the merits of the case. That’s why on TV a hair dryer is as important as a notebook. In a televised debate, the audience will consider the person whom they like more to be the winner, regardless of the arguments presented.

In fact, something I find useful to do, and I do it with media training sometimes, is to have people turn off the sound, watch the debate, and tell me who won. They usually can do it based on who is smiling, who is confident, and who seems at home with the interviewer. They know who won the debate at the end, and it has very little to do with the merits of the case. While there are audience members who are persuaded by logical arguments, there are many people who are not. They are persuaded either by emotion or by psychological factors about which they are not aware.

Finally, sixth, there’s a principle of scarcity. Opportunity seems more valuable to us when availability is limited. People are more motivated by the thought of losing something than they are by the thought of gaining something else. It’s an odd thing, but true.

For example, if you tell people they can gain significant health benefits by joining your gym, that’s actually less powerful than telling them that they will lose significant health benefits by failing to exercise at your gym on a regular basis. They may or may not want to be thin and beautiful, but they sure don’t want to get sick, and the fear of getting sick is more powerful than the idea of becoming healthy and fit. Similarly, it’s less persuasive if you say, “We need to go to war with Saddam Hussein to make the world a better place,” than if you say, “We need to go to war with Saddam Hussein because he threatens our way of life and perhaps our very existence.” You see the difference?

**Prevailing Narrative**

In any event, there is likely to be what I would call the prevailing narrative that, once established is very difficult to change. It’s therefore worth making a strong attempt to establish a prevailing narrative yourself.
rather than waiting until later to try to change it. It can be done—you can change the narrative, but it’s much harder than establishing the narrative up front. Sometimes two narratives will compete, especially when you have two groups that are both skilled in communications.

For example, on many issues, conservatives will have one narrative, liberals will have another, and in those cases, discussions will be absolutely at cross-purposes. A perfectly good example of an issue about which there has been much debate is abortion. Pro-life sounds good, but pro-choice sounds good, too. So as long as it’s framed positively, it’s sort of an even match.

The prevailing narrative about Franklin Delano Roosevelt today is that he was a great president, leading America through the Depression and World War II. If, however, FDR’s opponents had succeeded, the prevailing narrative would be that FDR exacerbated our economic woes, shredded the Constitution, and was much too slow in challenging Nazi Germany and Imperial Japan (or even that he tricked America into World War II).

Ronald Reagan is a more recent president, so there’s more controversy over his narrative. In the end, I believe you will see that he was a president with a few big ideas that he pursued doggedly and successfully. Most importantly, Reagan was the president who told Gorbachev to “Tear down this wall,” who called the Soviet Union the “Evil Empire,” and who won the Cold War. Notice the use of emblematic moments: “Tear down this wall” and “Evil Empire.” These things fixate in the mind and nail the prevailing narrative to the wall. By the way, in terms of Reagan, his opponents have a different and less flattering narrative, but I don’t think that’s going to win out in the end.

Consider the last election: Democrats tried to drive the perception that George W. Bush was a frat boy without the experience and knowledge to be president. It would be difficult, I think, for them to use that line of attack in the next election. Republicans tried to drive the narrative that Al Gore changes his personality as often as his wardrobe and that he lacked a moral center of gravity. They said that he had been too close to President Clinton, and we were all tired of Clinton. None of this, by the way, was incidental. There were long discussions about what the narrative should be and how we were going to drive that message and persuade most people to embrace that particular narrative. It doesn’t mean it’s not the true narrative. In most cases, it’s much easier to sell the truth than it is to sell fantasy.
Comparative campaigns — going negative?
Let me talk very briefly about positive versus negative campaigns. You always have this choice: you can attempt to persuade your audience to view your side more favorably, or you can attempt to persuade your audience to view your opponents more negatively. Keep in mind, negative ads and attacks are likely to be used against you, your causes, or your clients, whatever the case may be. This leads to the well-known phenomenon of positive versus negative ads with negative ads probably getting you more pound for pound, dollar for dollar. Moreover, this gets back to the principle of liking, which I already mentioned.

Now, an example of this would be the demonization of Newt Gingrich. My mother-in-law thinks Gingrich is a very mean, bad person. When I’ve asked her why she holds this opinion of Gingrich, she doesn’t have a clue. She can’t give me an answer. Gingrich, who happens to be one of the smartest and most fascinating people I know, simply got branded early on by communication snipers who understood that it was much easier to attack him than it was to attack his ideas. So that’s what they did, and they did it rather well.

Similarly, I used to do a lot of talk radio, and people would call in angry about the Contract with America, which they call the Contract on America. I’d ask, “Well, name three things from the contract that you really disagree with and really object to.” They never could. I told them to name two, or name one. They had no idea.

You sometimes see this in product advertising as well, although comparative advertising is generally more careful in its criticism. By the way, Nick Nichols and Eric Dezenhall have done the best work on this. Dezenhall’s *Nail’Em* is the most important book on this topic, providing the most useful information I have ever found on crisis communications.

You need to know whether you are winning or losing. Sometimes it’s obvious how well your message is penetrating and persuading. Sometimes you need polling to help you determine where the audience is and/or which way the audience is heading. If you’re losing, if your target audience is not with you, you need to reevaluate your plan and then wage information warfare with a very intensive campaign. But if the opinions of key audiences are with you, a less visible program of perception management is needed, rather than information warfare. You may want to avoid open combat and conflict with your adversaries because it’s better to deprive them of a platform. You want to make it hard for them to gain visibility.
An example is a candidate who has 60 percent in the polls and has a challenger whom he refuses to debate. Why does he refuse to debate him? He doesn’t want to make him his equal. He doesn’t want to give him the chance to start a fight. He wants to make it hard.

**Selling Values**

Let me talk for a moment about public relations versus strategic communication. For those of you who are on the political or policy side of this, it’s very important to look at what Madison Avenue is doing. They make mistakes, but they also do some things right. Note how sophisticated manufacturers sell their products. Coca-Cola could just tell the truth. They could just say, “Look, we make fizzy flavored sugar water infused with caffeine. It tastes good. Please buy it. I’m trying to put my kids through private school.” That would be a truthful, honest, direct message. Or they could try a primitive public relations strategy based on explaining. “Yes, we know our product is just fizzy, flavored, caffeinated sugar water, but, hey, you like it. It’s not so bad for you. Buy it anyway.”

Or, they could do what they’ve actually been doing for years, not selling the product at all but instead selling values that they associate with the product. “It’s the real thing.” It’s so authentic, and, by drinking it, you will be, too. “I’d like to buy the world a Coke.” Drinking this beverage says that you’re a caring kind of person.

Look at any of the products that are important and think about how they are selling themselves. They aren’t at all. They are selling values that they associate with the product and with you. McDonald’s does not sell you hamburgers; it is selling you the time that you, as a hardworking person, deserve with your family. “You deserve a break today.” When you watch ads, think about what they are really saying.

Volvo has been very adept at communications strategies. Volvo does not sell cars; it sells safety. A few years ago, I saw a Volvo commercial that was revolutionary, just stunning. What was so revolutionary about it was that this commercial never showed a Volvo. It never even showed a car. Imagine you’re an ad agency and you go to the manufacturer and say, “Here’s a commercial, it doesn’t show your product or any other product. None.” What does it show? It shows happy families in pleasant environments—at the beach, in a spacious backyard with a playground—and the narrator just says, very simply, “All these people have one thing in common; they all believe they’re alive today because of the car they drive.” On the screen there’s a black background with the white letters, “Volvo.” You want that car. You must have it. If you love
your kids, you really want that car. You don’t need to see it. Who cares what it looks like? It doesn’t matter, you want that car.

**Measuring Success**

So how can you measure if such ads are successful? It can be very easy, but it can also be very hard and sometimes close to impossible. If you are doing communications for Krispy Kreme Doughnuts, you can start with how many doughnuts you are selling now or what percentage of the market share you have, and then see if you’ve made progress after a given time has elapsed—an easy, simple way to proceed. If you’re running for office, you’ll know on Election Day whether you’ve reached your goal of a 51 percent or better share of the vote. With some issues and debates, you can do a benchmark poll, then you run your campaign, and you come back and see if you’ve made a difference.

For example, I can conduct a poll and find out how many people know who Fred Smith is and what they think of him. Then I could design a communications plan, implement it, and conduct another poll to see if I’ve increased his name recognition or improved his image. It would take a lot of money for me to try such a challenging task, but, theoretically, I could do it. If, however, you’re playing on a crowded field where there are many different variables influencing public perceptions, you can’t take such measurements accurately. All you can do is construct what you believe to be a persuasive message based on data, theory, and gut perceptions. You can develop messages that you believe will persuade the target audiences you care about, and then measure whether you have successfully driven those messages, repeatedly, to those audiences. Keep in mind that to absorb the message, the members of your audience need to hear it a minimum of seven times.

Consistent repetition is the key to message penetration. Let me say that again. Consistent repetition is the key to message penetration. When you are sick of repeating a message on TV, on radio, or in print, that is usually when your audience is beginning to hear it. What trips up too many communications programs is boredom and fatigue. People get tired of their own messages. They think that everybody knows it and everybody has accepted it. They abandon those messages too early in favor of something new and more exciting—a move that spells disaster for some campaigns.

In sum, I’ll give you a few random thoughts about which I don’t have time to say more than a few words, but that I think are worth bringing to your attention. First, transfer the battle to enemy territory.
Remember that in any battle, whoever is explaining is probably losing. So make your adversaries do it. Play the victim. Americans have developed a very bad habit of loving victims too much. Liberals love to play the victims. Conservatives hate to do that. But it’s a powerful strategy that you ignore at your peril. The media hates to see symbols of power. For example, for years we’ve been seeing on TV Israeli tanks on the one hand, and Palestinian kids throwing stones on the other. Israelis cannot win that battle of images, even though everyone should know that tanks are not being used to fight kids but to fight terrorists who routinely blow up kids.

The media loves victims, but they particularly love bad news. In the April 9, 2003 edition of *The Washington Post*, there was a picture of Iraqis wildly celebrating with coalition forces, and they were just so thrilled, you could see it in their faces. The headline under the picture read, “Many in Basra resent British failure to control theft.” That was the headline on this picture. That was probably also an example of anti-war copy editors refusing to give credit where credit was due. But they love those stories. The media love allegations. This is very much a Nichols-Dezenhall concept. Allegations are easy to use to construct a story. The Iraqi Foreign Ministry alleged the CIA was poisoning Iraqi children, a charge that the U.S. Government denied. But the media want allegations. It’s a story. As soon as you make an allegation, it’s a story. It doesn’t matter if it’s true or not.

So whoever makes the first allegation forces the other side to explain, and that side will generally lose that battle unless they can launch a destructive salvo in return. Usually, the best way to do this is not to explain and answer the allegation, but to say, “I can’t believe my opponent is resorting to such tactics and mudslinging.” When Senator Daniel Patrick Moynihan was in a race against James Buckley, Buckley initially referred to him as Professor Moynihan, and Moynihan responded by saying, “Ahh, the mudslinging has begun.”

So, keep in mind that to get your point across, you must start with a simple, effective message and a way to deliver it. If you follow the steps I’ve outlined above, you will be well on your way to winning.
This chapter will explore the creation of an effective message by drawing on survey research, the identified values, and the strategic plan that’s been outlined. This chapter will highlight two case studies—the DDT/Save the Children from Malaria and American Plastics Council’s successful campaigns.

**The Save the Children from Malaria Campaign**  
*Roger Bate*

When I was a kid, my trumpet teacher told me, “An amateur practices until he gets something right; a professional practices until he doesn’t get it wrong.”

Looking at the other chapters in this book, I’ve learned that I’m very much in the amateur category. I’m kind of a “serial think tanker.” I work on many different issues. I don’t consider myself an expert when it comes to crafting messages.

I’m going to discuss the *Save Children from Malaria* campaign that
was run from CEI by me and other staffers. It also involved numerous think tanks from around the world and one or two health groups, including Africa Fighting Malaria, of which I’m a director (See Figure 5.1).

The campaign was really about stopping the United Nations from banning the pesticide DDT. After all, that was what we were actually trying to do, and we had a considerable degree of success. Although DDT is listed in the Persistent Organic Pollutants (POPs) Convention, it is not banned for use in malaria control.

We had one key point that we needed to get across: there was a huge difference between DDT for use in agriculture and DDT for medical use. We were, however, going against a totem of the green movement. At the time, it was thirty-eight years since Rachel Carson wrote her book *Silent Spring*, which launched environmental awareness both in this country and across Europe. We were never going to be able to convince anybody who wasn’t already a scientist that DDT was not particularly harmful to the environment. If used in excess—and this would require tons of DDT as opposed to the pounds and ounces I am speaking of—it might cause harm. Again, however, I am speaking about the small amounts that are used medically in public health. The dose makes the poison—that was the key point we needed to get across to the hierarchy at the UN.

I’m going to share briefly some of the facts as we presented them to the United Nations, and then go on to the more nuanced aspects of the campaign. The reason I am going to present some of the facts first is that while I know there are lots of policy wonks here who probably know this stuff forward and backward, there are probably other people who don’t.

Most people think of malaria as a tropical disease. Well, it is today. But it wasn’t until 1964 that Europe was declared malaria-free. Indeed, there were many outbreaks, even as far north as the Arctic Circle. Rus-
sia in the 1920s and 30s experienced significant outbreaks. Also, in the southern United States and even Michigan there were sizeable outbreaks in the 40s and 50s. Malaria was eradicated by vector control. The vector of malaria is the anopheles mosquito. So, we’re talking about spraying a substance that kills a lot of mosquitoes.

The original means of inoculation were pesticides like pyrethrum, which were replaced after the Second World War with DDT that was sprayed on walls to deter mosquitoes from entering dwellings. Malarial areas in South Africa were reduced by four-fifths when they used DDT, and DDT remained in the program until 1996, when environmental groups, which are especially strong in this country and in Europe, lobbied hard against it. Also, when you spray DDT on walls, it leaves a stain. People don’t like that aesthetically, and it increases bed bug activity. These facts might bother people initially, but they soon change their minds when their children stop dying from malaria.

Well, when they stopped using DDT in 1996, malaria increased six-fold. This happens wherever DDT use is dropped. (See Figure 5.2).

Sri Lanka is a great example. There were 3 million cases of malaria after the Second World War, twenty-seven cases in 1963, and then back up to 2 million cases when they stopped using DDT because of environmental pressure. South Africa, however, is the country about which I know the most.

We had a successful campaign in South Africa. Indeed, from the end of 2001, the numbers began to drop drastically. They’re even better this year (See Figure 5.3).

So, there is a great deal of scientific evidence backing up our case. Facts are very important when you’re dealing with people who like scientific information, but that scientific information has been around for a very long time. Everybody knew that it worked. Yet the ban, at least in certain countries, is coming into force.

### Vector Control in South Africa
- Paris Green, Pyrethrum – then DDT;
- Malarial areas reduced by 4/5th;
- DDT remains part of program until 1996;
- Environmental pressure, staining, bed bugs forces removal of DDT;
- Malaria cases increase 6 fold.

**FIG. 5.2: Vector Control**
For the most part, what South Africa does often the rest of Africa will do. So, DDT has been reintroduced. The South African Department of Health explained that it’s the most important factor in reducing malaria. Other African countries have learned from South Africa and have started using DDT again. Because the bans are falling, we are seeing reductions in deaths and massive reductions in case numbers, leading to huge economic implications.

A group of free-market think tanks and one or two health groups were involved in this campaign. The first point we made was that none of the groups had any obvious economic interest in the campaign. The point I want to come back to is that I tried, at considerable length, to get the business community interested in this. I was making the point, “Why don’t you make a stand on principle?” No one in this country makes DDT anymore. The only countries that still do are China, India, and possibly Russia—presenting a perfect opportunity for businesses to stand on principle and say that toxicology of this chemical is not bad. It should still be used. Unfortunately, I couldn’t persuade them to do that. Thankfully, think tanks involved did not get any money from the Indian or Chinese governments.

Consequently, The Washington Post grilled me for about an hour
and a quarter in two separate interviews. They never ran a piece. In the end, all they were trying to do was to find out whether we were funded by pesticide manufacturers, which wasn’t the case. It was useful that the ad hominem attacks from the most sophisticated opponents were not likely to be successful, something that is not necessarily going to happen in every case.

One example that we used was the number of children who die from malaria every day. It’s the equivalent of seven Boeing 747’s crashing into the ground, an image that the media picked up and ran with, especially in South Africa. But again, we’re talking about numbers. The technical medical community joined the campaign. We had people from Harvard University, universities in Africa and Britain, and elsewhere being very proactive on this issue because they were scared that they were actually going to lose a means to control a disease that affects 300 – 500 million people, mainly children. Malaria kills more than 2 million young people per year. That data encouraged the medical community to get behind us.

We had country delegate support at the POPs Convention of the UN Environment Program. We had countries like South Africa, Zambia, and one or two countries in South America that weren’t antagonistic. But you have to remember there were more representatives of environmental organizations at this convention than there were delegates for the whole of South America, the whole of Africa, and virtually every other country combined. The only country that had more delegates than any one environmental group was the United States. That’s how much this mattered to the environmental movement. They didn’t want to lose this campaign.

So what did we do? Well, we produced a personalized story in glossy format, Save Children from Malaria – A Global Health Initiative. The personalized story is of a domestic servant in Johannesburg, Jochonia Gumede, or Jockey as he’s known to his friends. He has worked as a butler to a wealthy family in Johannesburg. He has lost at least three relatives to malaria because his family comes from Jozani, which is one of the poorest regions in Kwazulu-Natal, the region of South Africa most affected by malaria.

We worked with a PR firm in the United States to craft an effective message that we could get across. As Clifford May pointed out earlier today, we made the other side explain themselves. So rather than asking, “How can anyone condone the use of DDT, doesn’t it destroy the environment?” the question we asked was, “Why are you allowing one
brown baby to die every fifteen seconds, because you’re not allowing DDT to be used, when DDT eradicated malaria from the rich world forty years ago?” Of course, it was phrased better than that.

So the pressure was put on the World Wildlife Fund, Greenpeace, and other groups to respond. It proved to be a most successful approach. There is a television program in South Africa, a bit like one of the news programs here on a Sunday evening, which lasts an hour. The show devoted a five-minute segment to Jochonia and his story. He was pictured with the one grandchild that’s still living. He was bouncing her on his knee, and she was laughing. He said, “Thank God that DDT has been reintroduced because at least this grandchild isn’t going to die.”

With that imagery, we effectively pushed our second objective—changing the messenger. There have been a lot of people in the academic community who have been saying that we need this chemical. What Jochonia did in a wonderful setting was emotionally relaying the egalitarian point. He emotionally explained the human cost of a ban on DDT.

Now, this aspect of unfairness of how western countries have eradicated malaria with DDT in the 40s, 50s and 60s played very, very well with a lot of left-leaning papers. USA Today covered it very positively. The Guardian, which is Britain’s superior left-wing newspaper, devoted a front-page story to this topic. Newspapers and TV shows that would normally not even get into health issues—The Financial Times, for example—carried major stories on it.

I would say that, when it came to getting policy in place on the ground, it was very important to have the medical community with us. Three Noble Laureates and 400 malaria specialists signed a letter originated by the Malaria Foundation International and Malaria Project. We had a significant impact there. We’re still trying to build on that by using the trust that was built up on malaria to work on other issues such as AIDS and tuberculosis. Nevertheless, we’re finding that trust is what is needed to build health community support.

The two sticking points there are access to drugs for AIDS and agricultural subsidies. It’s going to be easy for the U.S. trade negotiators to cave on the access to drugs initiative because they want agricultural markets opened up, as do we. They will probably cave on drug patents as a quid pro quo for a deal on agriculture.

President Bush wants to combat AIDS, spending 2 billion dollars of new money every year. After the war in Iraq, the President needs to show that the mighty United States can be compassionate—a war on
AIDS could be spun very well. I mean that in the most positive terms in using the word “spin.”

I think there are problems with that, however. The problem is that the money is going to go through the U.S. Agency for International Development, which has been derelict in its duty on malaria, and well may be derelict on AIDS.

One of the things that Africa Fighting Malaria has done is work well with political allies on the document of the UN Convention. Often, free market advocates go to these international meetings and don’t concentrate on “the document.” At any UN meeting, there is always a document that will be approved in the end, and it often makes the rounds during the negotiations. Most of the time, we get sidetracked from our core activity, which is to change the language of the document.

Now, there are times when there are good reasons for this failure to act. What the few of us tried to do during the DDT fight was to concentrate purely on the language in the one clause that we needed in the document. We were closer to the issue than we ever have been, making us pretty successful in the end.

The United States and the EPA haven’t been particularly helpful, and all the Agency for International Development is doing on malaria is providing bed nets. Now, bed nets are very, very useful; however, it’s as though the people in charge of these agencies are presenting themselves as academics, working on academic problems. They’re doing studies on how effective one type of bed net may be over another.

Meanwhile, we know what can work very well. They, however, just don’t want to do it because it’s politically incorrect to spray pesticides, whether it’s DDT or anything else. Yet, it’s a considerable problem that needs to be overcome.

As successful as we were at the public relations and policy levels, we failed to convince the business community to stand on principle. DDT may be today’s target, but it’s not going to be long before chemicals that the industry cares about are added to the POPs Convention and other chemicals regulations. The industry has not taken a principled stand. They’re taking a pragmatic one, which is not a great surprise. It is, I think, a significant problem because they’re going to lose if they continue to ignore principle.

I’ll finish by saying that we worked with a lot of people, and we had a lot of help from the medical community and many political activists. We ran our campaign with a budget of only $180,000; $20,000 was for the public relations firm that helped us and then about $160,000 on
travel and people. It’s incredible what kind of success you can have on a modest budget if you have the right message.

This story is a great example, I think, in which we did have a great case to make. It’s not often you can go out and say that we don’t have an economic interest in an issue. Rather, this disease kills many children every day, and there is an easy solution. By the way, we have the South African government on our side. I know those things are not often replicable, but what is replicable is the trust that we built up with the medical community. Furthermore, we made the change using an egalitarian message. It is the first time I’ve ever been involved in doing something like this, and I do think about it whenever I’m working on any other campaign.

I think that a lot of the reason for the success of this campaign was because Fred Smith and I had talked. Fred introduced me to Wildavsky’s form of political cultural analysis, and we thought through how we could present this information. It was a contributing reason to why we won.

It’s always nice to win. Unfortunately, every three years the UN will re-evaluate its position. It could, therefore, go from Appendix B, which means it can be used, to Appendix A, which will mean it can’t be used. Any single country can continue to ask for an exemption so they may currently use it, but then you risk getting a great deal of pressure put on the countries indirectly because of aid contracts and loans. We already have the World Bank trying to ban the use of DDT. It means that some of the groups that should be our allies, the aid agencies who have very good people on the ground, often are our foes.

We are waging an ongoing battle. I started on this in 1998, and I don’t think this debate is going to be over for a long time. I urge anybody, however, to use it as an example. Perhaps you can emulate our approach to aid your own campaign.

Values-Based Communications Laddering

Rick Otis

I’m a regulatory policy creature of Washington, D.C. and I can tell you more than you want to know about how somebody interpreted an esoteric part of the Safe Drinking Water Act and about the personalities of people involved in influencing the legislation.

I do not consider myself to be a communications expert, but I can
tell you what I have gleaned about communications during my years as a regulatory policy practitioner. I use what I’ve learned about public communications in my day-to-day writing and speeches. I also share my knowledge with other people who are trying to advance their cause.

I’ll start my presentation with an anecdote. Regulatory reform and the Republican agenda in the 104th Congress were so badly clobbered in part because a lot of the people who were working with us were so absolutely, terribly awful at describing what we were trying to do. The industry lobbyists (myself included) were equally guilty, but at least a few of us had some experience in successfully communicating with the public. Nevertheless, there were many others who were very bad at it. So, a group of us began to take congressional staffs, particularly Republicans, off-campus to introduce them to people who had polling data that provided feedback on our regulatory reform agenda. We examined how the public reacted when “regulatory reform” was mentioned. We were also able to show them things like how the public reacts when it hears such words as “environmental Nazis.”

Some thirty years ago, when I was in college, I read a book in a course I had on classical rhetoric. I think it was Plato’s *Rhetoric*. A phrase at the beginning reads, “Rhetoric is the art of persuasion.” Rhetoric, I would add, is also a science because there are some technical things you can do to help phrase the message.

I have noticed that some of my friends in places like CEI, Heritage, and Cato do not understand that we are literally in the business of persuading someone to change his mind, or to form an opinion if he doesn’t have one yet. We think we can just put out a paper, put out an idea, and because of its righteousness, people will automatically agree with it. When we put out our ideas in this fashion, we are operating under a flawed assumption and usually do not win converts.

I want to give you a little bit of a framework for crafting values-based messages. I want to talk about something called a “values ladder,” from which we derive the actual words that we use in our message. Coming up with a message is not a mysterious, accidental mechanism that you then test with focus groups. There are legitimate ways to help derive your message so you aren’t just guessing. I will also give you a few examples of values laddering, some of which will already be familiar to you (See Figure 5.4).

I often watch many folks from public policy think tanks try to communicate a message, but they don’t really have a very specific reason for why they are doing it. If you’re developing a message in a political
campaign to elect someone, there’s usually a specific part of the overall strategy that you’re trying to communicate. All too often, when we try to bring new ideas to the American public, the ideas are far too scattered and lack a specific focus. Consequently, I am going to urge you, in some sense, to narrow your message. Have a very specific reason why you’re trying to convince somebody of a certain point.

We frequently attempt to differentiate what we’re doing from what someone else is doing. This doesn’t necessarily mean saying why their idea of what we should be doing is wrong. But you should try to say what it is about yours that’s right. You should be able to say why your idea is right in terms that are personally relevant to the person or people you want to influence.

Much of what we’ve discussed here has involved coming up with models and mechanisms for characterizing different people in different ways. You can connect with various categories of people by making your message personally relevant to them. When I try to communicate a message, I talk to you about something that’s personally relevant to your life that’s going to happen to you tomorrow or happened to you yesterday. I am not talking to some abstract person while pointing at the ceiling.

Also, you need to identify target audiences and their specific attributes. In the American Plastics Council’s case, they spent a considerable amount of time defining exactly whom in the American public they needed to address. They called them “opinion leaders.” That’s their

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**Message Crafting: Values ladder as message**

<table>
<thead>
<tr>
<th>Values</th>
<th>Stable, enduring, cultural</th>
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<tbody>
<tr>
<td>Consequence</td>
<td>Emotional, social benefits</td>
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<tr>
<td>Benefits</td>
<td>Functional benefits</td>
</tr>
<tr>
<td>Attributes</td>
<td>Policy position, opinion characteristics (polling data)</td>
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**FIG. 5.4: Values Ladder**
terminology for it, but the Plastics Council knew exactly who they were. They knew a lot of demographic information about them, including what television channels they watched, at what hours of the night. So if you need to speak to people in personally relevant terms, which you do if you want to persuade them, then you need to know an awful lot about exactly who they are.

Much of what we have talked about presumes large-scale communications programs. Malaria, mentioned in the prior section, is a small-scale one. The Plastics Council had $25 million a year in television advertising. When I sit down with congressional staffers and others and try to train them in communications basics, I tell them, “It’s the day-to-day stuff. It’s the speech. It’s the press release. It’s the report. It’s the article you write for a magazine.” So I hope what you take from this presentation is that these tools should not only be applied to large-scale efforts, but to your daily efforts as well. Before I get into some of the mechanisms for developing a values-based message, I want to make one point that we have actually heard several times this morning. It’s something that I think our side is absolutely 100 percent guilty of: we assume our potential audience thinks the way we do. Engineers are not poets. If you speak to a poet as if he were an engineer, not only do you lose him forever, but he literally won’t understand what you are saying. You might as well not waste your time.

There is a good reason for developing a message that links to a particular core value. Moreover, anyone who has successfully gotten his message across is someone who has learned how to measure his progress and then used that measurement to figure out how to get the message across again. You can do that during a political campaign with polling.

In the case of the plastics industry, they segmented the target audiences in various ways and through polling were able to determine month by month where those people were on this particular chart. We re-jigged the message and the timing of the television advertising, as well as the amount of investment that they were putting in daily, to change the communication results. So never forget about measuring your progress and adjusting your communications strategy accordingly.

There are six or so steps that I want to discuss. First, I’d like to talk about the target audience. There is a values-based model for decision making. It’s essentially a mechanism for mapping the thinking process of your target audience. It’s a way of determining how your audience links a very specific attribute of your communication’s subject, your candidate, or your product to a core cultural value.
From the map comes something called a communications ladder (See Figure 5.4). That ladder actually develops the messages, and I’m going to discuss a couple of case examples so that you can see what I mean. Again, you need to test that message. You can convene focus groups or conduct surveys. Then deliver your reworked message and measure your progress.

Very often what I find happens with people is that they take what I call “basic polling data” and manipulate it, guessing at what a likely message is. Then they test the message, and if it doesn’t work, they try another one and test it. If it doesn’t work, they repeat this very expensive and time-consuming process. When you’re going to spend 25 million dollars a year on advertising, that’s also risky. Communications ladder- ing, by contrast, is a mechanism that, up front, almost assures you the message is going to work before you even test it.

What you’re testing in this case is only the creative people’s ability to get the message across with whatever media you’ve chosen, not the message itself. The message is almost guaranteed to work when constructed through a communications ladder or map, which is why I want to explain how to craft messages through laddering techniques. Let me give you an example. If I were to ask you, “What are the top ten things that come to your mind when you think of plastics?” one of them is likely to be “They don’t break.” I’ll then inquire, “Well, why is it important to you that plastics don’t break?” You might say, “I don’t want to cut myself.” Then I would ask, “Why is it important that you don’t cut yourself?” You might answer, “Well, I’m a parent, and it’s a little hard to be a good parent changing diapers with something wrapped around my finger.” I would ask, “Why is it important to you that you be a good parent?” You might reply, “It’s one of the things that I’ve always wanted to be in life and gives me a sense of self-realization and is a sign of success to me—that my life has some meaning.” Why is it important that we as parents and individuals in our society have meaning? Well, it’s because the world would be a safer, more secure place if we all had a certain sense of self-realization.

What I’ve done here is to uncover the thinking process that you go through that links a specific attribute of plastics—they don’t break—to a core cultural value—self-realization (and success, safety, and security). Well, that’s a lot that I’ve just identified in you, and can actually learn from you. Then I would construct a map that goes from the ten core attributes of plastics (or a political candidate or an environmental issue) and map them in a spider-like fashion up to one or two core cultural values.
What you’ll find is that, if you try to deliver a message crafted from a laddering analysis, but you miss a link, the audience won’t understand it because you’ve lost them on the logical path down which you were trying to lead them. So when testing your message, you need to ensure that you make all the links that are important to your target audience.

One of the things that you may discover in mapping these linkages is that there are some links between various attributes, benefits, consequences, and values that are stronger than others, like a carbon double bond versus a carbon single bond. When you trace linkages through the map, and you get from one attribute to a particular point above it, say a benefit, you may find that benefit has two or more consequences, and you’re not sure which to choose. But in the testing and development of your message, you can figure out which of those links is stronger. In the 1984 Reagan-Mondale campaign, for example, we asked people which of the ten campaign issues they associated with Republicans and which they associated with Democrats. In this way, we were able to discover which consequences like “build individual opportunities” or “inspires confidence” or “secure children’s future” were associated with which political party.

If you try taking a ladder from a campaign issue that belongs to your political opponent, you have no credibility to make the case. The public wonders, “Why are they talking about that?”

There are techniques to determine the strongest, most successful ladder to use. This is one ladder pulled from a spider web-like map (See Figure 5.5). Can anybody guess what the product is? It’s diet beer. This is actually part of a map used by Miller Lite to develop the message campaign that they had associated with convincing us all to buy lite beer. What was the message for lite beer? “Tastes great; less filling.” Miller didn’t just create that by having a bunch of people sitting around a table throwing things up on the wall. They actually pulled it from this map.

In the TV advertisement, you’ll see that “Tastes great, less filling” shows up not only on the screen in words, but also in the audio and the video portions of the advertisements. They tested the creative ad to make sure the target audience actually got the idea of relaxation and social facilitation. The Miller Lite ad shows somebody walking into a bar to meet friends who are already there. When the guy walks in, they pat him on the back and invite him to sit down. Belonging. They’re friends of his.

The whole ad touched on these points, while the verbal piece that we all remember is “tastes great, less filling.” These benefits were linked
with the social consequences for and values of the target audience. The result was that Miller sold more lite beer than anybody else has ever been able to sell.

To give another example of message construction, it’s no surprise that one of the things you heard from Ronald Reagan’s campaign was “peace through strength.” There was a concern in the campaign that the American public felt that he was too quick to pull a trigger and could be untrustworthy in protecting the country because he might just take us to war.

Using values mapping, however, Reagan’s pollsters also found that the American public thought that strong defense was a way to achieve world peace, giving them a sense of security and making them feel that future generations would enjoy a safer, better place (See Figure 5.6). Reagan’s pollsters also discovered that the public linked things like Star Wars and MX missiles to strong defense. So if you look at the campaign ad, the bear in the woods that we all remember, the theme behind that is peace through strength.

That message phrase came from the values ladder. So this is what I mean when I say that the message isn’t something that you create out of whole cloth. Those words “peace through strength” came, as far as I understand my history lessons, from that ladder.

A further example comes from a Clinton speech having to do with tax policies or tax reform (See Figure 5.7). The benefits are improvements in competent leadership, confidence in government, and sanctions
of social consequence. They particularly linked it to a “peace of mind.”

I’m not suggesting that his is a successful ladder, but it just happens to be the one that pops out of this speech, as you can see from the phrases to the right. It gives you a sense of how you develop a speech text message as opposed to an advertising message. If you read the quotations on the right-hand side, you’ll see that they have pretty much tried to create an increasingly abstract hierarchy from the very concrete tax proposal of some kind of 10 percent tax cut to the concept of renewing America’s future.

From what I’ve read, there are about twenty to thirty values that American civilization has. Freedom is only one of our values. Consequently, I’m somewhat concerned that we all just assume that freedom is the value to which we should be linking everything. From my point of view, once you’ve decided what your target audience is and why you’re doing this, what your goal is—the value at which you should aim—is the one that emerges from that mapping exercise. Not one that you presume to know is the correct one in the first place.

The failure of the Republican response to Clinton’s speech is that it presumes that the audience links tax reform policy to the concept of freedom. In the case of the Plastics Council, the attribute that was most associated with plastics was, believe it or not, peace of mind. You wouldn’t know that unless you did the map. Almost all of the various ladders and the map that the plastics industry has—the environmental and safety concerns over plastics—all track to “peace of mind.”

An awful lot of the target audience won’t get that point unless

![Diagram of Reagan's peace through strength message]

**FIG. 5.6:** Reagan’s peace through strength message
you connect the dots for them. So the Clinton speech succeeds, in part, because he actually connects the dots. Now, my understanding of Clinton is that you have an intuitively good speaker who also has research work behind him to support his assertions. Meanwhile, the Republican response is probably the result of a speechwriter who was told to com-

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**FIG. 5.7: Message Strategy Case Examples**

**President Clinton’s Speech**

- **Personal Value**
  - Peace of Mind
  - Hope/Optimism
- **Psycho-social consequences**
  - Confidence in Gov’t.
- **Benefit**
- **Issue**
  - Tax Reform

**Republican Response**

- **Personal Value**
- **Psycho-social consequences**
- **Benefit**
- **Issue**
  - Tax Reform

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"...Renewing the very idea of America...forging a more perfect union...balanced budgets as far as the eye can see..."

"...widening the circle of opportunity, deepening the meaning of our freedom..."

"...a government that gives people the tools to make the most of their lives..."

"...government that is leaner, more flexible, a catalyst for new ideas..."

"...the lowest tax rates in 20 years...targeted to the needs of working families..."

"...high taxes mean less freedom overall...limit government and expand personal freedom..."

"...we pledge to replace the new tax code with a new system..."
municate values. So, the speechwriter might have just guessed that the value of tax reform is greater freedom that presumed that the audience would understand. I suspect that this is why the Republicans failed, while Clinton’s approach succeeded.

If you decide to take on an argument and deliver a message that is in a different place from where your target audience is, they’re not going to listen to you. They’re not going to pay any attention. They’ll be confused. So for example, in the case of climate change, if the American public has decided that climate change is a real problem—and I don’t have the polling data for you—and you want to engage in a discussion over the underlying science, they’re going to ignore you. They have finished that discussion. They’re tired of it. They’ve come to some other point in the policy process that is independent of how you are choosing to develop your message on the subject. Consequently, there is no audience for your message in the American public.

Now, you could change the discussion and reverse it by reframing the issues. Change it from “We’re worried that welfare costs too much,” to “We’re now concerned that welfare is harming people. Well, now you can go back and develop the argument of harming people on some of the underlying data, and you’ve shifted it a little bit. So you probably can reverse policy evolution, but perhaps only by reframing the problem that the policy is meant to address.

**Think like your target audience, not yourself.**
Delivery and the News Media

Nick Nichols, Herb Berkowitz & Larry Hart

It isn’t enough to know what your message is; it’s also important to know how, when, and where to deliver it to have maximum effect and reach. In this chapter, three well-known public relations experts will explain the most effective techniques for reaching a targeted audience.

Crisis Management

Nick Nichols

I am a crisis manager by trade. I am usually involved in discussions with radical environmentalists and radical animal rights people.

I use values research to try to convince my corporate clients to drive up values and benefits in their messages, particularly when they’re in the midst of a crisis. I also use values research against our opponents because I think I’m one of those folks who actually believes that there are two messages that ought to be sent in a controversy. One should be from the client that goes to the values level. The other message, which is sent by different people, should be directed at creating risk for the op-
position: tearing down, if at all appropriate and possible, their mantle of virtue, which is what the left is good at exercising.

Crisis management is not a science. So I steal my golden rules of crisis management from other people who demonstrate just plain good old common sense. I’ll share a couple of those rules with you here.

The first rule I stole from a park ranger in the Great Smokey Mountains National Park, who told my son, Adam, and me when we asked him about bears that the most critical rule for survival in any situation is never to look like food. This rule applies equally to corporate America and the way that it will often communicate, particularly when it’s being attacked. Corporations, conservatives, and anyone not on the left often look like food, and this is in large measure because of the way they deliver their messages.

The message really has three parts. The first is about facts; you educate people with the facts. The second part is emotion; you motivate people with emotion. I hear from my friends who are conservatives and Republicans that emotion is usually left out of corporate messages. The third key ingredient is the messenger. As you’ve probably heard fifteen or twenty times, the message is about 80 percent visual these days, if you’re dealing with broadcast where many controversies are adjudicated.

Emotion is particularly important for driving value-laden messages. It’s the emotional part of the message that really needs to contain values, “core values,” as pollster Richard Wirthlin would say. That’s where a ladder linking facts to emotions to values becomes exceptionally important. Corporate America is very good at communicating the facts. They are not very good at communicating emotion, especially at the values level. They’re definitely not very good at finding the right spokespeople to do that.

If people are asked about corporate communications, their basic perception is that it’s weasel words delivered by weasels. That’s our communications problem in a nutshell.

I wanted to give you an example of the kind of message I have to deal with almost daily from corporate America—this is a real message that I was asked to review. It is an example of the kind of message that is crafted by a company in trouble: “We have conducted a toxicological study to better understand our product, using the best risk assessment models available. A baby would have to be exposed to 500 parts per billion of our chemical over a long period to suffer the same adverse effects that we observed in rat livers. If a baby uses the product safely, we don’t see any reason to be concerned.”
That’s a real message that was brought to my table for evaluation and modification. When you look at it, you don’t see what the values are here. I’ll dissect it very rapidly. First and foremost, I just want you to know that the word “toxicology” is a “no-no.” Toxicology means something is toxic, which is obviously bad. Second, when a company says, “We want to understand our product better,” the American consumer responds, “If you don’t understand the product, why should we take a chance on it?” You’ll see this in corporate messages all the time: “We want to understand our product better because we engage in good product stewardship,” which is another thing that the American public does not understand. They don’t know what stewardship really means. These are again considered weasel words delivered by weasels.

“Risk assessment” is not a good term either. “Risk” means risk to the public. If you’re doing safety studies, that’s one thing. If you’re doing risk assessment, you’re in deep trouble. “A baby would have to be exposed to 500 parts per billion.” No one understands 500 parts per billion. They don’t want to understand it. I have news for you, the American public really doesn’t want to be educated about your policy. Seriously, they don’t want to know. Furthermore, you frighten them. This isn’t about a policy, but when you start using scientific terms—500 parts per billion or million or whatever it might be—you scare people. Then we have “rat livers,” but I’ll just set that one aside. That this particular CEO wanted the baby to use the product safely is another issue. So, that’s what we crisis managers have to deal with in the trenches. We try to take those words and run them through the scientists, and then run them through the lawyers—and we have to, you know. Then drive it up the ladder to hit a value, and it’s very, very difficult.

Corporate America and people to the right of center in politics need to understand in more detail what folks are working on today. It is so important that people at the grassroots level in corporations, in political parties, and elsewhere understand some of this stuff because they’re the people who do the messaging. They’re the people who act as messengers. Until they understand, you can sit in a conference room and accomplish very little.

I’ve talked a little bit about words, about the message. Let’s talk about the messenger for just a moment. The messenger who I normally deal with is a guy in a suit, white shirt, and tie. I may sound sexist, but when I’m in media training or doing crisis management consulting for a corporation, my favorite spokesperson is a woman with credentials because guys who look like me don’t do well as messengers.
When you get right down to it, the facts that you present have to be defensible. What we often miss in corporate America is making them personally relevant, not only through the words, but also through the spokesperson. The message has to connect facts emotionally up to a values level. If it doesn’t do that, you have failed as a communicator.

Your message also has to be simple enough to make sense. I have heard many people say that you need to communicate at a ninth-grade level; I disagree with that. I think you need to communicate at a sixth-grade level, particularly if you’re talking science and policy. We have two or so generations in this country that I consider to be functionally illiterate when it comes to science, or any kind of policy-based information. I don’t consider it “dumbing down;” it’s simply communicating with consumers in a way they’ll understand. Of course, the message also has to be quotable.

Now, moving on, it’s very important to find those emotional hot buttons. There is the benefits message that the parties and the policy advocates ought to be sending and that corporate America ought to be sending, and that’s where you go to the values level. But, if you get into my line of work, then you need to be talking about that second message, creating risk for the opposition.

That second message, I believe, is absolutely essential, and that message should not be sent by you. It should be sent by someone else, an ally, or a third party.

The DDT debate shows a perfect example of the kind of second message you would send, using the values ladder as a direction for developing the message and having others send it for you. The fact of the matter is millions of folks in Africa and the Pacific Rim have been dying of malaria because of the policies advocated by the radical environmental groups. The people who support Greenpeace believe that they are caring for the environment. Greenpeace and others don’t care about those millions of folks who are dying of malaria, including the hundreds of thousands of babies dying of that disease.

The messages that you can’t send but your allies ought to be sending would look at the moral implications here. “Look what their policies have done.” I believe that second message sent by others is as important as your message because what the left and what the radicals have going for them today is that they always have that mantle of virtue, that mantle of morality that you have to bust through first before you can communicate. Someone has to tear that mantle off them. You can use values communications to go negative.
Generally speaking, the company under attack should not send a negative message. Others are often available to send it for you. If you hit your opponents with the positive and negative messages, and your benefits-oriented message is driven to the values level, then you have the recipe for success.

Finally, the spokesperson has to be credible and acceptable. Having Muammar Khadafi equivalents as your spokespeople won’t hack it. Keep that in mind. Most of my clients in corporate America spend 98 percent of their time trying to craft the words and spend two percent of their time worrying about who delivers them. That’s not the way to do business today. Worry about who is delivering the message.

I spend a lot of time trying to secure and motivate spokespeople from communities, minority communities among them, to talk about the importance of environmental benefits in the context of industry and to drive home the negative messages where appropriate against the radical environmentalists. The activists from the left have a very difficult time when they’re confronted with an African American who is saying your policy hurts our people. That’s the kind of thing you need to be thinking about when you are not only developing the words, but identifying the appropriate spokespeople.

This brings me to golden rule number two, which I stole from George Carlin. He once said, “If you can’t beat them, arrange to have them beat.” I think that’s a really important rule to remember, particularly in corporate America and to some extent for the right of center groups with which I work. Not enough time is spent developing allies who will go out there and deliver those bad cop messages. Not enough time is spent developing and motivating those allies who will serve as your spokespersons to deliver the messages that you don’t and shouldn’t deliver.

I make the argument to my clients in corporate America that “spin” is dead. If you take a look at polling results, however, the average consumer believes that spin is alive. I’m not talking about modifying your words to reflect the way consumers think; I’m talking about credibility. Consumers don’t believe companies tell the truth. You cannot advance a policy or protect the product by trying to spin your way out of a serious problem. It isn’t going to work.

Industry has found itself in serious jeopardy from the standpoint of credibility in delivering messages for two reasons. One, they try to turn a serious problem into silk, and it doesn’t work. People will see through it. Again we see weasel words delivered by weasels. Another thing that
business does, regrettably, is engage in appeasement, whether it’s with
the trial lawyers or the environmental groups, or whoever. Every time a
company agrees to roll over and give New York State Attorney General
Eliot Spitzer 10 million bucks in order to have him stop chasing them, it
tells the consumer that the company did something wrong.

I would say that this is true on the policy level as well. Taking a
good, sound policy that you believe in and engaging in appeasement
only says to some very important people out there that you didn’t be-
lieve in what you were advocating to begin with and that you were
wrong.

Q & A:

Question 1: If you were handed the account for an auto company’s
SUVs, what would you do?

Nick: I don’t handle any of those accounts, but I think one of the most
important issues that they are confronting is what crisis managers call
“process variables.” One of the most important values in our culture is
choice. So if you frame the SUV issue as one of denying the public their
opportunity for informed choice, it seems to me you can start to drive it
up the values ladder. If I were involved with those accounts, I would be
delivering messages that reinforce the notion that people want the op-
portunity to choose. What is it that the folks who are criticizing SUVs
really want to do by taking SUVs off the market? They are really trying
to control your life. They want to tell you what you can choose. They
want to tell you how to lead your life their way. That’s the kind of mes-
 sage that I would be trying to drive home both directly and indirectly
through third party analysis.

We use about ten process variables. They drive up values in crisis
management: choice, justice, and other values. You use those values to
evaluate where you are in a controversy. With SUVs, the first thing I
would be driving at is freedom to choose how you live.

Question 2: I completely understand why in the corporate world you
would want an accredited woman as your spokesperson. But most of us
are in the policy or public policy or political arena. When you’re pre-
senting a conservative message, does it help or hurt if the woman who
is presenting is obviously Republican in her pearls, etcetera? Or does it
help if she goes undercover a little bit and wears a little bit less country
clothes?
Nick: Well, I do crisis management and media research through schools. There’s one called the Hollywood School, which talks about cosmetics, which are important. Clearly, you have to be concerned about how the spokesperson looks. If the spokesperson, through his or her cosmetic appearance, reinforces all sorts of negative views, or stereotypes, then the problem needs to be addressed. Look at the stereotypes about conservatives or Republicans; if you’re reinforcing that, you need to change what you’re doing. You need to find a different spokesperson or dress that person better.

When I say I prefer to see a credentialed woman as a spokesperson, I don’t want to balderdash you. Men that look like me are not believed. That’s the bottom line. Most men are not believed. Just go with the woman. I don’t know whether some of the bulls in the room will disagree with me, but I have examples from three or four different firms. Compare women spokespeople to men; there’s no comparison in terms of credibility. Then you’ve got to add credibility from there.

I think policies ought to be advocated by people who (a) have the credentials to advocate them, and (b) are believable. It’s important to know whether they’re going to be viewed as a weasel or viewed as someone who is credible and legitimate and ought to be listened to. Another way to know who that spokesperson ought to be is to use basic research. Look at who is concerned about those issues and match that spokesperson with that demographic. In the case of environmental issues and animal rights issues, I think you’ll discover that women are concerned about animal rights issues, and the environment, more than men are.

Question 3: My question is on industrial appeasement, a real problem. When I used to run a PBS program called Techno Politics, eventually I got to the point where I could go to my associate producers and say, “Well let’s do this environmental issue, and, by the way, which industry group are we going to call today to betray their industry?” I say this because every industry spokesman would come on and say, “Well when we reach across the table, we reach halfway.” Of course, the environmental advocate would, in effect, say, “We’ll take that half, and then we’ll drag you the rest of the way across the table.” That’s happening constantly. This whole city is filled with people who are reaching halfway and being pulled across the table. So how do you talk industry into stopping this appeasement process?

Nick: I encounter this problem all of the time. Compared to five or six years ago, we can now give companies some case history on appease-
ments, which, as you well know, encourages one thing: another attack. Look at some of the true appeasers of the corporate world in the last five years; for example, British Petroleum, whose chairman was virtually doing the Macarena with Greenpeace. But when BP executives arrived in Johannesburg for the 2002 Earth Summit, who, to their surprise, was the first company that Greenpeace and then others attacked? It was BP, of course. So now BP has spent millions of dollars posing for what crisis managers call “holy pictures.”

In short, all that money is going down the tubes, and they’re getting attacked in the process. We now have some case histories to demonstrate to other corporations, who are contemplating appeasement, that principled compromise is fine, but rolling over and barking at the moon when Greenpeace calls or when Jesse Jackson or major activists attack is not an appropriate thing to do. So, luckily, compared to six, seven, or eight years ago, we now have case histories, some research to evaluate the effectiveness of appeasement as a strategy. It generally does not work.

**Goals, Markets & Media**

*Herb Berkowitz*

I am one of those who believes in the power of words. So I will focus on a few words.

Number one: goals. I think when you’re running a campaign, whether it’s a political campaign or a legislative campaign, your goal should be clear. But that’s not always the case in much of what we do. I say that after having worked in the trenches for thirty years with organizations that share our common beliefs. Sometimes people will call me up and ask how they can get a feature written about their organization. I ask them: What have you done to deserve such a feature?

In the area of communications, like all other endeavors in life, it is useful to have goals. Those goals will shape what you do and how you do it. So what is your goal? Is promoting free-market environmentalism your primary goal? Or are you more concerned with increasing the visibility and enhancing the image of your organization? Or is it something else altogether? Whatever it is, you need to have specific goals in order to have a good, effective communications program.

Many years ago, I was working as an outside consultant—once removed—for the Chemical Manufacturers Association. I was actually a paid “fly on the wall” for a New York public relations firm that was
involved in a large-scale campaign involving a huge issue. The campaign we were working on was Superfund—a program that, despite spending vast sums cleaning up waste sites, has produced little health or environmental benefits in its more than twenty years of existence. I was seated against the back wall in the CMA conference room, and sitting around the table were all of the VPs for communications and public affairs for all of the big chemical firms in America, CMA, and some of the allied chemical associations. At this early organizational meeting, the chemical industry executives were supposed to map out their strategy for defeating this ill-considered legislation. Instead, the CMA VP for communications gets up and starts the meeting by saying, “Well, what we really need to decide today is what our fallback position is.”

I’m dead serious. I worked on that campaign for ten months, knowing that their goal was to lose. I did my best to make their case with leading opinion writers, and was happy to cash my retainer checks. But their ultimate goal was to lose.

Depending on what your goals are, you’ll probably be aiming your message at a lot of different “markets,” or audiences—perhaps opinion leaders, in Washington or your state capital, experts in a particular field, and the general consumer public. They all have different interests, different needs, and different levels of knowledge and sophistication. You may have eight target audiences. To reach those audiences, you’ll have to vary your message to take into account their interests, needs, and knowledge level. So you may have five different messages. You might have three different spokespeople to deliver those messages. One of the internal battles I waged and lost at The Heritage Foundation involved the need to tailor our products to different audiences. So we might have two or three versions of the same thing. Everybody would sit around and agree that it was a good idea. But nothing was ever done about it.

The point is what “sells” with our good right-wing friends isn’t necessarily something that’s going to turn around a liberal journalist or resonate with the general public. Unfortunately, we have to deal with journalists who are more liberal—in the modern political sense—than we are, more trusting of government regulation, and more hostile to or at least skeptical of “the market.” These are journalism’s “gatekeepers,” the people who decide whether our message goes any further. If we turn them off right up front, sometimes in our first sentence, we have lost the battle. Because you have different audiences, you’re likely going to have different messages.
Who are you trying to reach? What are the best ways to reach them? Finally, what message will motivate, activate or convince that particular group?

It’s important to remember, especially if you’re involved in a campaign, that you don’t have to change a lot of minds to change the outcome of something. Because we can’t talk directly to everybody we want to reach, one-on-one, we go through intermediaries. We do it every day when we talk to the press.

Unfortunately, our side consistently falls short in this area. We don’t do a good job of dealing with the media, the most accessible and influential intermediary at our disposal. Many on our side are afraid of them, don’t talk their talk, don’t think the way they think, don’t like them, don’t want to like them, and don’t want to have anything to do with them. I, however, love them and would suggest that we need to spend time cultivating relationships with these vital “gatekeepers.”

The media are not the only intermediaries, of course. There are also the people who are already on our side. They also have tentacles, and, through their publications and personal and professional contacts, can reach many others. These include the people who visit your website, because most of the people who visit our websites are already with us. If they’re not, they usually leave quickly. You can communicate with people on your side by e-mail, fax, direct mail, and a dozen other ways.

Don’t overlook direct mail. It’s often seen as an old, outdated technology, but it’s effective, and there are new ways of doing it through e-mail. This enables you to go directly to a group of people with your message. Direct mail and its contemporary electronic variations are more likely to be used in a campaign of some sort than they are in more generic communications programs.

You can also seek public speaking engagements. The tone of what you say will change if you’re talking to people who don’t already agree with you. Indeed, your objectives may be different. In some cases, your objective may be to convince the convincible. Or merely to convey information. In other cases, you may want to neutralize people so they’re not against you. Don’t overlook that.

Most people really don’t feel that strongly about any given issue. Sometimes, if you can convince them to sit on the sidelines and say nothing, it can be a real benefit to you.

There are three other things I wanted to stress. Number one, develop communication skills. You could have a very knowledgeable and attractive spokesperson, but if that person is boring, or a dud, it doesn’t
do any good. So I would suggest that you consider training the people
who represent you in public forums and on radio and television.

Second, effective communications requires relentless repetition. The Soviet propagandists knew this. Consistent repetition is the key to
communication success. You’ve got to say the same thing over and over
again. You may say it in different ways, but say it many times. Say it;
and then say it again. As I mentioned earlier, different audiences will
have different interests, values, and levels of knowledge. So you’ll have
to say substantially the same thing in different ways to reach them and
elicit the response you’re seeking.

Finally, one word: “barstool.” It’s called the barstool test. I spend
time in bars. I talk to people. The point is those of us in this room deal
mostly with “wonky” types of issues, as in “policy wonk.” If you want
to communicate with ordinary people, even highly educated ordinary
people, you’ve got to be able to talk in terms that the guy sitting next
to you in a bar will understand. Now, your barstool conversation will
be different if you’re at a convention of the American Medical Associa-
tion and talking about medical issues than it will be if you are at Peggy’s
Place, where my friend, who is a professional gambler, hangs out when
he’s in town. Anyway, remember the barstool test. In terms of your mes-
gage, it will help you focus on the different audiences you’re going to
have to use different language to deliver your message.

Q & A

Randall O’Toole: I have a question about adopting the rhetoric of the
other side and trying to capture it for your own. When is that useful and
when is it self-destructive? Or is it ever useful? I’m working on urban is-
sues and “smart growth,” and it’s a term the other side uses. People on our
side say, well, the public really doesn’t know what smart growth is. So we
can call ourselves smart growth and just try to take over the initiative.

Herb Berkowitz: I guess I would say it depends on the circumstances.
In the circumstances you just described, the public does not know what
smart growth means. Why shouldn’t we be the advocates of smart
growth? People like things that are smart. People like growth. So fill in
the blanks; it becomes our definition.

In many other cases, however, I think we’d be shooting ourselves in
the foot. Language is very important for many reasons. We don’t have
to adopt the language of the other side. I think we can develop our own
language. Our own language could be just as friendly and acceptable as theirs to us is frightening.

*Larry Hart:* I would just add to that I think that the important thing is that this is the trap that we fell into for many years, which was to adopt the other side’s characterization of us. When you do that, you’ve lost. What is critical is that you develop your own language to describe and to frame the issues your way. It doesn’t have to be necessarily the same phrase of “smart growth” but another positive phrase that is attractive to people and that will attract attention. As soon as you allow the other side to characterize you, then you have a problem.

*Alex Castellanos:* Boxing is a good general example. If the enemy is strong, hug your enemy. If you’re strong and the enemy is weak, don’t let him hug you. The goal generally, with tons of exceptions, is to neutralize or to sometimes split their strengths, robbing them of their language. Sometimes that is a good thing, but not always.

*Fred Smith:* The left is getting more and more clever at adopting our language, especially in the market area. In the environmental field, Environmental Defense can talk about economics and logics better than almost anyone on our side can. But they see markets in a very passive way, not in an active way.

**Reducing Media Hostility; Gaining Positive Coverage**

*Larry Hart*

What I have to say touches on to how to work with and how to get positive responses from the news media. I call my presentation “Hart’s guide to reducing media hostility and gaining positive coverage of your issues” (See Appendix B).

That awful power, the public opinion of a nation, is created in America by “ignorant, self complacent simpletons who failed at ditching and shoemaking and fetched up to journalism on the way to the poor house.” This is a Mark Twain quotation from about a hundred years ago. So, each generation has had its problems with journalism. I think the news media, to some extent, revels in the bipartisan criticism. I’ve been on both sides of this. I spent nine years in broadcast news, and then for many years since I worked in government public affairs. Now I am in the private sector.
The message that I have is for people in the front lines, for people who have to work personally with the news media. There are a few of you here. There are some of you who have others in your organization who do that.

If there’s any message that I really want to drive home, it’s that your organizations and all right-minded organizations should make use of this field guide over the years because there’s high turnover among media folks. I see it on Capitol Hill. I see it in companies. I see it in associations. These new people who come in need training and education about what we have discussed today.

In 1989, when I first started on the Hill, a very astute communications director for House Minority Leader Bob Michel decided it would be interesting if Republican press secretaries in the House had a news or press manual that they could use. Many of the people who handle communications on the Hill are right out of school, and they are handling social issues, tax policy, and the press all at one time. The interesting thing is that nobody had ever even considered doing this before, and I don’t think anyone has done it since. But we did it in 1989. I just want to encourage you to do something like that.

Now, does the other side do this? In the little time I had to research this, I came up with something that was put out by the Community for Creative Non-Violence—the late Mitch Snyder’s organization that staged hunger strikes. It’s called *Managing the Media* and is sixteen pages of how to handle the media. Now, does anyone here know of any organization on the right that has sixteen pages devoted to helping their organization manage the media? I thought not. If you’re wondering why at times we’re up against the wall, that’s why. We just don’t pay enough attention to media management.

I call this effort within your organization, “dealing with the news media.” Don’t call it “dealing with the press.” Ronald Reagan knew not to because he was in broadcasting. People in broadcasting, as I was, don’t like to be called “the press” because they don’t roll any presses. They prefer to be called the news media. When you hold a conference for the media, it’s a news conference. It’s not a press conference.

Herb Berkowitz was talking about how much our side just dreads the whole idea of dealing with the media. I don’t because I was a member of this feared group, so I enjoy interacting with them. Your reporter, however, is not your pal. Watch out for that. It’s very easy, when you start evolving your relationship, to begin to think of the reporter as your
friend, and that you can tell him or her just about anything. As members of Congress have found out, that’s a bad idea.

But the reporter is not your enemy. Both you and the reporter are professionals who have jobs to do. It’s a business relationship, and like all business relationships, they work better when they’re cordial and professional. So as you develop your relationships with the media, put it on the friendliest terms possible, but remember that they’re not your pals.

Another thing I would like to discuss is strategy. I call my little firm Hartco Strategies, and the reason I do that is that I believe anybody who sets out to accomplish anything has to have a strategy for doing so. Political campaigns want to get someone elected; a company wants to sell a product; and an association wants to convince people on an issue. Do not go into a news campaign without having a strategy and the goal in mind.

The next thing to do is to develop a framework slogan. This slogan should be something that characterizes what you’re trying to do. Right now, I’m helping the Independent Policy Network with media relations, and I have come up with “sharing ideas that free people.” For many reasons, this slogan reflects what they’re trying to accomplish. The important point of this is that when you come up with the framework of what you’re trying to do, you can then take all the things that you need to do and use the framework. Then you can do your news releases and your interviews. These all should reflect that framework.

There is an example I’d like to use from former President Clinton. I spent a year and a half as a career employee at the Department of Energy in the Clinton administration, where I learned the art of good public relations. In Snyder’s sixteen page opus that I referred to earlier, who do you think is the one major figure they use as someone to emulate in managing the media? President Ronald Reagan. We learned much from Ronald Reagan about media management success. I heard a lot of this from the Clinton people while I worked with them. They had an incredible admiration for the way Ronald Reagan took the rug right out from under the Democrats after they had dominated the issues in the media for half a century.

It’s important to frame the issue. For example, the estate tax issue shouldn’t be framed as an unfair tax on the estates of the super rich, but rather a death tax that prevents small business owners and farmers from passing on to their children what they’ve worked their whole lives to gain. Whoever defines the issue often decides the outcome.
Now, when you’re dealing with the news media, what I would recommend is to try to think like a reporter and an editor. To do that you need to learn, to some extent, just how the news media is structured. You should know the difference between the way a newspaper works as opposed to the broadcast media or the Internet. It’s important to know how each operates and who decides how and when a story gets into the media. You also have to realize it’s not usually the reporter who decides to cover a story. It’s the editors. It could be the assignment editor or the news director of a broadcast station. It all depends on how large the organization is. But it’s very important to know who the assignment people are. Who are the people assigning those reports? After you’ve built that relationship, then you can start building the relationship with the reporters who are assigned to your stories.

Each type of media has a target audience they’re trying to reach. It’s good to research what audience different publications and different broadcast outlets reach. If you can adjust to that audience, you’re that much ahead of the game. Talking about statistics or how the masses of people are helped or hurt by a policy is one thing. Discussing how, for example, northern Virginia is affected by the policies that you’re talking about makes it much better for that particular market.

A few of the do’s and don’ts of working with the media are summarized in the accompanying guide (See Appendix B). I’ll briefly discuss a few others. First, make it easier for reporters to do their job. What I would recommend for most of the groups that I’ve gotten to know very well in the last few years is to treat the media a little like you do the donors to your organization. In other words, when you arrange something for or impart knowledge to your donors, you do so in such a way that is convenient for them—as well as frame it in a way that they would find interesting. It’s critically important to know the demographics of your organization to do all of this effectively. What organizations seem to forget is that they must do the same for the media covering them. You must know who is covering you, and you must work around his or her timetable in order to gain positive coverage. Give them a sound bite. Quotations are the lifeblood of print and broadcast media. The best quotation always wins.

One of the first issues I got involved with on the Hill about thirteen years ago was the fight over taxpayer funding of the National Endowment for the Arts. Former Majority Leader Dick Armey came up with the phrase: “They can do it on their own time and on their own dime.” This was picked up. It was irresistible as a phrase. Even though the vast
majority of the news media support public funding for the arts, reporters and editors ate up his words; they can’t resist a good quotation.

Another thing is business. If you’re going to have a news conference, you must have a visual because there is only one point to having a news conference: getting a camera there. If you do not expect to have a camera there or if you don’t care, then don’t have a news conference. You can send out a press release or talk to some people individually. But the only way that the cameras will be interested is if you have something visual to show them. The more visuals you have the better. Get them an interesting person to talk to so you get in the news cycle.

The Clinton administration was very adept at this. It is much more effective to get into a news cycle regarding something that you want to respond to than to try to get a reaction 24 – 48 hours later. Furthermore, the news cycle depends upon deadline. It’s a little bit easier now because you have 24-hour cable. With 24-hour cable, there is almost a continuous news cycle.

Plan the headlines. Oftentimes there are terrific opportunities to get in on issues that are of concern to your organization because it happens to come up in a breaking story. This may be because Congress passed “the bill,” and the President signed it, or if something happened of some great note on some particular issue. You can play on the headlines by establishing relationships with the people who cover these stories and the editors who assign these stories. Let them know you and become available to them. Once they come to you and get a good quotation on a particular issue, they’ll come back again and again when these stories break.

Now, I will tell you what not to do. Probably the biggest mistake I have seen made in a news release over the years is what I call, “burying the lead.” The lead is a journalistic phrase for the first sentence; it defines the story. It defines what you’re viewing. Oftentimes, news releases are written as more of an op-ed piece or an article. That’s not what a news release is. It is, in effect, your breaking story, and it should appear the way you want it read. If they can only use the first paragraph and nothing else, then it should tell the whole story.

Also, don’t be forced to say something that you don’t want to say. If you get a question you don’t want to answer, don’t answer it. People these days are trained to turn over questions and give the answer that they want to give even if it doesn’t speak to the question asked at all. You need to train your people because it is so easy to get into trouble. I always get complaints that 90 percent of the story was X, but “they”
printed Y. I tell these people that they could not have printed Y if you had never said it.

Another piece of advice: never lie to a reporter. You would probably say you never would. But sometimes under extreme circumstances people make mistakes. It is not a good idea. Whatever the short-term benefits, the long-term damage will be greater.

Do not let media calls go unanswered. Even if you do not want to comment on something, if you want to establish a relationship with the news media, call them back. Tell them, “You know, I’m really not in a position to comment on that.” Also, if it’s past their deadline because you just didn’t get it in time, let them know that. But don’t just fail to respond to calls. Believe it or not, there are a lot of people who think that an issue will just go away if they don’t respond to media calls.

“Don’t wait to react” somewhat goes hand-in-hand with “playing the headlines.” Let the news media know that you’re available for comment on stories that they are writing. You can establish credibility that way. Often with a deadline story, the reporter is looking for a quick quote. So if you want to react to something, jump on it. Don’t wait for them to call you. Call them.

Finally, don’t wing it. This actually ties it all together. Use planning, strategy, and policy expertise to avoid the unwanted story or quotation. You should have people who are prepared for whatever breaks on issues that are of importance to you. You should not have to reinvent the wheel if something happens to which you must react.

Q & A

Question 1: I’m surprised you didn’t mention much about the value tilt of journalists. Many are liberals. Do you see that as a significant barrier to getting your message across?

Larry: Is there a liberal bias in the press? Yes, and it helps to understand their mind-set. Their mind-set is that government helps people. People who care about government aid programs are out to help people, and people who are opposed to government aid programs are trying to hurt people. It’s all from that mind-set. They ask, “How can I be fair about this?” So the point is that you need to frame issues.

Question 2: I would like to ask about what I would call “carrot feeding the media.” I found cases in which they don’t know anything about the issue, and the only person they hear from is the one who is spinning it,
the opposition. So you can give them a book; let them read it. Or even if it isn’t an issue that’s coming up, just call and talk. So there’s a bit of carrot feeding that we have to do, but we, for some reason, feel as if we shouldn’t do that.

Larry: This is incredibly important. You have to establish a relationship with the people who are covering your issues. You first need to research and see who those people are. If you have a series of three issues that your organization has as its top priorities, you can research all of the people that have written on these stories over the last year or two. Then go back and see who the editors of these publications and broadcast outlets are, and you should just start from one and go down the list. Make the contact, let them know who you are, and let them know about your organization.

Send them your newsletter, and send them what you’re doing. Doing so establishes the relationship so that you’re not coming out of the blue. Carrot feeding is very important. Help them do their job. Many of these people are generalists. The trade publications are different; they’re going to get down to the nitty-gritty. They’re going to ask you all about the regulations and so forth. But 95 percent of the journalists that you’re going to encounter are coming from the school board meeting to cover an issue you’re talking about, and they really don’t know the background of the issue. The more you give them, the more you can help them do their job, the more they’re inclined to get the story done the way you’d like it.
Conclusion

For years, the free-market community has struggled to explain itself effectively to the general public. Instead of communicating the egalitarian values of the free-market movement, we have apologized for our beliefs, allowing the left to have the upper hand. Furthermore, we have not communicated at the level of the average, or “rationally ignorant,” person. Rather, we have used lofty, academic language to prove our points—perhaps winning the intellectual battle, but losing the most important battle of all: advancing classical liberal ideas in any sort of meaningful way.

What we have seen in this book are effective techniques to disseminate our message to a mass audience and overcome the problems that have handicapped us in the past. We have seen how a values ladder can help us use the right words when relaying our message, as well as how we can best work with the media, both during times of crisis and with a long-term strategic communications plan.

We hope that this book has provided you with insight and ideas on how to communicate your messages more effectively.
Appendix A

National Media Inc/CEI National Survey

N=800 registered voters

Questionnaire

Screen: registered to vote at this address

1. Some people seem to follow what’s going on in government and public affairs most of the time, whether or not there’s a big news story such as the war in Iraq. Other people tend to pay attention to government and public affairs only when there is a big news story. Would you say that you:

• Pay close attention every day
• Pay close attention sometimes
• Do not pay close attention unless something big is happening
• Other (vol.)
• Don’t know
• Refused
2. Sometimes people cannot vote in every election even though they would like to. Would you say that you:
   - Always vote in every election
   - Vote in most elections
   - Vote in some but not most elections
   - Rarely vote
   - Have never voted (vol.)
   - Other (vol.)
   - Don’t know
   - Refused

3. All in all, do you think things in the United States are generally headed in the right direction, or do you feel that things are off on the wrong track?
   - Right direction
   - Wrong track
   - Other/mixed (vol.)
   - Don’t know
   - Refused

4. Regardless of how things are going right now, would you say that overall (ROTATE;)
   - America’s best days are ahead of us
   - America’s best days are behind us
   - Other/mixed (vol.)
   - Don’t know
   - Refuse

Now, I’d like to ask you a different kind of question. I’d like you to tell me how you feel about some public figures by using the numbers between zero and one hundred—one hundred means you have an extremely warm, favorable feeling about them, zero means you have an extremely cold, unfavorable feeling, and fifty means you don’t have a feeling one way or the other. You can use any number from zero to one hundred. If you have never heard of the person, just tell me and we will go to the next one. First, how do you feel about (item) using a number from zero to one-hundred? (CODE “Don’t know” 999.)
5. Saddam Hussein (ASK FIRST, RANDOMIZE OTHERS)
6. Hillary Clinton
7. Rush Limbaugh
8. Tom Daschle (DASH-shul)
9. George W. Bush
10. Bill Frist (rhymes with “mist”)
11. Ross Perot
12. Rosie O’Donnell
13. Bill Clinton
14. Jesse Jackson
15. Ronald Reagan
16. Teddy Kennedy
17. Simon from the “American Idol” TV show (ASK LAST)

Thinking some more about political issues…

18. How would you rate the job George W. Bush has been doing as president—do you strongly approve, somewhat approve, somewhat disapprove, or strongly disapprove of the job he’s been doing?
   • Strongly approve
   • Somewhat approve
   • Somewhat disapprove
   • Strongly disapprove
   • Don’t know
   • Refused

19. When it comes to political issues, which one of the following two goals is most important to you personally, if you had to choose just one? (RANDOMIZE SEQUENCE OF FOLLOWING THREE PAIRS AND ROTATE WITHIN PAIRS)
   • Protecting the freedom of the individual
   • Caring for those who need help
   • Other/mixed (vol.)
   • Don’t know
   • Refused
20. Which of these two is more important to you:
   • Maintaining order and stability in society
   • Protecting the freedom of the individual
   • Other/mixed (vol.)
   • Don’t know
   • Refused

21. Finally, which of these two is more important:
   • Caring for those who need help
   • Maintaining order and stability in society
   • Other/mixed (vol.)
   • Don’t know
   • Refused

22. Thinking ahead to next year, which of these issues will be most important to you when you vote for Congress in 2004? (ROTATE)
   • Economic issues like cutting taxes and creating economic growth
   • National security issues like maintaining a strong defense
   • Issues like improving public schools, health care, and protecting the environment
   • Issues like crime, drugs, and welfare abuse related to the breakdown of society
   • Moral issues including the right-to-life, prayer in schools, and pornography
   • Human equality issues like ending racial discrimination and poverty

Here are the names of some institutions and groups. I’d like you to tell me how you feel about them, again using the numbers from zero to one hundred. If you have never heard of them, just tell me and we will go to the next one. First, how do you feel about (item)?

23. The United States of America (ASK FIRST, RANDOMIZE OTHERS)
24. Public schools
25. NAACP
26. America’s hospitals
27. The Democratic Party
28. Pharmaceutical companies
29. The American Civil Liberties Union or ACLU
30. The United Nations
31. The national news media
32. The federal government
33. The Boy Scouts
34. Women’s rights organizations
35. Peace activists
36. The Hollywood entertainment industry
37. Personal injury trial lawyers
38. Big American corporations
39. Evangelical Christians
40. The U.S. military
41. Government welfare programs
42. The Republican Party
43. Environmental organizations
44. Business entrepreneurs
45. Labor unions

46. Thinking about the moral difference between right and wrong in society today, which of these two statements comes closest to your opinion (ROTATE:)
   • What is right and wrong can be different for different people
   • What is right and wrong is the same for everybody
   • Other/mixed (vol.)
   • Don’t know
   • Refused

48. When you make up your mind on political issues, are you the kind of person who puts more stock in (ROTATE:)
   • Your values and beliefs
   • Information and facts
   • Other/mixed (vol.)
   • Don’t know
   • Refused
49. If you could organize your life in any way you wanted, would you most prefer (ROTATE) to live a life that was spontaneous and flexible OR to live a life that was stable and structured?

- Stable and structured
- Spontaneous and flexible
- Other/mixed (vol.)
- Don’t know
- Refused

Now I’m going to read you some statements other people have made, and I’d like you to tell me if you agree or disagree with each one, using again the numbers between zero and one hundred. One hundred means you very strongly agree, fifty means you neither agree or disagree, and zero means you very strongly disagree. You can use any number from zero to one hundred. The first statement is (RANDOMIZE:)

50. We are using up the world’s resources too rapidly.
51. We would be better off if there was more regulation of business.
52. No American should be required to pay more than 25% of their income in taxes.
53. Environmental regulations should not be so extreme that they cause workers to lose jobs.
54. People should have the right to place some of their own Social Security money in investments they control.
55. Other species on earth are just as important as human beings.
56. People should have the right to drive any gas-guzzling car they want, including SUV’s, as long as they meet safety standards.
57. Science and technology provide the human race with our best hope for the future.
58. There should be limits on class action and personal injury lawsuits.
59. The government should provide health insurance to everyone, even if taxes must be raised.
60. Electricity generated by nuclear power is a safe alternative to burning fossil fuels.
Appendix A

61. Children should be allowed to pray in public schools if they want.

62. The government needs to do more to reduce inequalities between whites and minorities, even if some whites are temporarily disadvantaged.

63. Allowing people to privately invest some of their Social Security payments would destroy the Social Security system.

64. The government should offer vouchers to help parents who want to send their children to private or parochial schools instead of public schools.

65. Which of these three statements do you think is most important, if you had to choose just one (PUSH MIXED RESPONSE – I know it’s hard but which one do you think is most important?)

   ROTATE
   • Children must be taught to respect their parents and proper authorities.
   • Children must be taught to work hard and make it on their own.
   • Children must be taught to care about and be fair to others.
   • Other/mixed (vol.)
   • Don’t know
   • Refused

66. Which one of these three statements do you think is most important?

   ROTATE
   • People should have more respect for the traditional way of doing things.
   • People should be allowed to do things their own way.
   • People should be required to give up doing some things, if that might help the public good.
   • Other/mixed (vol.)
   • Don’t know
   • Refused

67. And, which one of these three statements do you think is most important?

   ROTATE
   • Government should maintain an orderly society.
• Government should stay out of individuals’ lives.
• Government should provide for those who can’t provide for themselves.
• Other/mixed (vol.)
• Don’t know
• Refused

68. Which of these three statements comes closest to your opinion about current environmental regulations (ROTATE TOP TO BOTTOM:)

• Environmental regulations should be strengthened and made tougher.
• Environmental regulations should be kept as they are.
• Environmental regulations are too extreme and should be changed.
• Other/mixed (vol.)
• Don’t know
• Refused

We are almost finished. I’m going to read you a few more statements other people have made, and I’d like you to tell me if you agree or disagree with each one, using again the numbers between zero and one hundred. One hundred means you very strongly agree, fifty means you neither agree or disagree, and zero means you very strongly disagree. You can use any number from zero to one hundred. The first statement is (RANDOMIZE:)

69. We should make sure lower income children have equal opportunity for a good education by letting every parent choose the best public or private school for their child.

70. Government should be completely color-blind on the race issue when it comes to jobs, promotions, and college admissions.

71. Natural regulation of the environment is better than government regulation of the environment.

72. Women and families have a right to the safety and protection provided by SUV’s.

73. There should be limits on how much government agencies spend on administrative costs instead of helping people.

74. It would be better if we had more organic, natural-style government in our communities and less factory-style government from Washington.
75. High taxes are especially unfair to working women, who already have to work harder than men to achieve the same rewards.
76. Higher taxes hurt women more today because more women are working now.
77. Making individuals feel shame for problems like drug addiction and welfare dependency is tough, but does help them overcome their problems.
78. Because life and health is so important, access to affordable prescription drugs is a basic human right that the government should guarantee their citizens.

Now, just a few more questions for statistical purposes.

Q01. What is your approximate age?
1 ............ 18 - 24
2 ............ 25 - 34
3 ............ 35 - 44
4 ............ 45 - 54
5 ............ 55 - 64
6 ............ 65 & Over
7 ............ Don't know (DNR)
8 ............ Refused (DNR)

Q02. What is the last grade of school you completed?
1 ............ Grade school or less
2 ............ Some high school
3 ............ Graduated high school
4 ............ Vocational/Technical school
5 ............ Some College/2 years or less
6 ............ Some College/more than 2 years
7 ............ Graduated College
8 ............ Post-graduate Degree
9 ............ Don’t know (DNR)
10 ........... Refused (DNR)

Q03. In the last general election in which you voted, which answer best
describes how you voted for state and local offices such as Governor or Senator?

(ROTATE CODES 1 THRU 7, TOP TO BOTTOM/BOTTOM TO TOP)

1 .............. Straight Democratic
2 .............. Mostly Democratic
3 .............. A few more Democrats than Republicans
4 .............. About equally for both parties
5 .............. A few more Republicans than Democrats
6 .............. Mostly Republican
7 .............. Straight Republican
8 .............. Other (VOL)
9 .............. Never voted (VOL)
10 ............ Don’t know (DNR)
11 ........... Refused (DNR)

Q04. On political issues, do you consider yourself (ROTATE) a liberal, a moderate, or a conservative?

1 .............. Liberal
2 .............. Moderate
3 .............. Conservative
4 .............. Don’t know (DNR)
5 .............. Refused (DNR)

Q04A. Have you done any of the following in the past two years (mark all that apply):

1 .............. Worked in a political campaign on a volunteer or paid basis
2 .............. Made a political contribution
3 .............. Written a letter or e-mail to an elected official or publication to express your opinion
4 .............. Expressed your opinion in person to an elected official
5 .............. Attended a political meeting or event

Q05. Which of the following income groups includes your TOTAL FAMILY INCOME last year, before taxes? Just stop me when I read the right category.

1 .............. Under $10,000
2 .............. $10,000-$20,000
3 .............. $20,000-$30,000
4 .............. $30,000-$40,000
5 .............. $40,000-$50,000
6 .............. $50,000-$75,000
7 .............. $75,000-$100,000
8 .............. $100,000 and over
9 .............. Don’t know (DNR)
10 .......... Refused (DNR)

Q06. Do you have any money invested in the stock market through individual stocks, retirement plans or mutual funds or not?
1 .............. Yes - Invested in the market
2 .............. No - Not invested
3 .............. Don’t know
4 .............. Refused

Q07. And what do you consider to be your religion?
   (If OTHER Ask:) Is that a Christian religion or not?
1 .............. Protestant
2 .............. Catholic
3 .............. Other Christian
4 .............. Jewish
5 .............. Other non-Christian
6 .............. Agnostic/Atheist
7 .............. None (DNR)
8 .............. Don’t know (DNR)
9 .............. Refused (DNR)

Q08. How often do you attend church? Would you say...
1 .............. Never
2 .............. Once or twice a year
3 .............. Once or twice a month
4 .............. Almost every week
5 .............. Every week
6 .............. More than once a week
Q09. Are you, yourself of Hispanic or Latino descent—for instance, Mexican American or Cuban or Puerto Rican, or not?

1.............. Yes
2.............. No
3.............. Don’t know (DNR)
4.............. Refused (DNR)

Q10. (IF NO) Is your racial or ethnic background (RANDOMIZE) white, black, Asian, Native American, or something else?

1.............. White
2.............. Black
3.............. Asian
4.............. Native American
5.............. Other
6.............. Don’t know (DNR)
7.............. Refused (DNR)

Q11. Sex (BY OBSERVATION)

1.............. Male
2.............. Female

Q12. Marital status

Q13. Children

Q14. Working women

END
CEI Values-Based Communications Workshop: News Media Panel

Hart’s Guide to Reducing Fear and Loathing of the Media and Gaining Positive Coverage of Your Issues: DOs and DON’Ts

DOs

1. Think like a reporter—think like an editor. Devise a strategy that will both get your message across and give the news media an interesting story.

2. Treat the media as you would a donor to your organization. Time and place your stories for their convenience. Know their deadlines. Give sufficient advance notice.

3. Make it easier for reporters to do their job. Make sure they have the background material they need to understand the issue.

4. Give them a “sound bite.” Quotes are the lifeblood of both print and broadcast media. The best quote always wins.
5. **Give them a visual.** TV editors demand something interesting to look at to put it on the air.

6. **Give them an interesting person to talk to.** Celebrities help, but so do everyday people who are helped or hurt by policies you are for or against.

7. **Get in the news cycle.** The Clinton administration perfected the quick response needed to get coverage in the first round of stories.

8. **Play on the headlines.** If a story breaks on issues vital to your organization, don’t wait for a call. Issue a quick comment.

**DON Ts**

1. **Bury the lead.** Develop the gist of your message, find an interesting way to say it and put that message at the top of your statements and news releases.

2. **Be forced into saying something you don’t want to say.** Take the question and turn it around to make your point.

3. **Lie to a reporter.** Whatever the short-term benefits, it results in long-term mistrust.

4. **Schedule for your convenience.** Use time and place to make it easy for the news media to cover.

5. **Think of the reporter as your pal.** Build a good professional relationship with reporters and editors based on mutual respect.

6. **Let media calls go unanswered.** It’s worth calling back even if the answer is “I don’t know.”

7. **Wait to react.** Let the news media know you’re available for comment on stories they are working.

8. “**Wing it.**” Use planning, strategy, and policy expertise to avoid the unwanted story or quote.
Bibliography and Suggested Readings


Roger Bate, Ph.D.

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Dr. Roger Bate is a visiting fellow at the American Enterprise Institute. He founded the Environment Unit at London’s Institute of Economic Affairs in 1993 and co-founded the European Science and Environment Forum in 1994. He is a board member of the South African nongovernmental organization Africa Fighting Malaria. Dr. Bate is the editor of the book *What Risk?*, which analyzes the way risk is regulated in society, and author of *Life’s Adventure: Virtual Risk in a Real World*. 
Herb Berkowitz

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One of Herb Berkowitz’s many achievements during his twenty-five years as head of The Heritage Foundation’s public relations department was the development of the organization’s Center for Media and Public Policy, which was founded “to help bridge the ‘communications gap’ between conservatives and the mainstream media.” Mr. Berkowitz has received the Public Relations Society of America’s highest honor, the Silver Anvil Award, and Public Relations Quarterly named him one of the top 100 public relations professionals in America.

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Alex Castellanos is one of the most sought after Republican political consultants in the Washington, D.C. area. Born in Cuba just prior to Fidel Castro’s takeover, he came to the U.S. with his parents in 1961. He has served as media consultant to dozens of political campaigns, including six presidential candidates. He has also consulted on advertising campaigns for a number of Fortune 500 companies and various trade associations, and frequently appears on CNN’s “Crossfire.” Mr. Castellanos lectures frequently internationally and in the U.S., from Harvard University to the United States Army Communication School.

Donald Devine, Ph.D.

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Dr. Donald Devine is currently a vice chairman of the American Conservative Union; however, he has served in many capacities during his distinguished career. During President Reagan’s first term, he was the president’s chief advisor on federal personnel. He also served as a senior consultant on the presidential campaigns of Bob Dole and Steve Forbes, and is the author of several books, including Reagan Electionomics, The Attentive Public, and The Political Culture of the United States.
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Larry Hart offers public relations and media strategy services to clients ranging from members of Congress to non-profits as well as general political consulting to candidates. He spent four years as a staff member of a House subcommittee, three years with the Department of Energy, and nine years in radio as an operations manager and news director for small to medium market stations from California to Virginia. He has also served as campaign coordinator and communications director in state and federal campaigns from Rhode Island to Texas.

**Clifford D. May**

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Clifford D. May is president of the Foundation for the Defense of Democracies, a think tank on terrorism created immediately following the terrorist attacks on New York and D.C. in September 2001. He is an expert on the media, having been a foreign correspondent and editor at *The New York Times* for nearly a decade. From 1997 to 2001, he served as director of communications for the Republican National Committee, acting as the chief spokesman for the GOP and head of RNC communications programs.
Nick Nichols

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As one of America’s leading crisis management experts, Nick Nichols has long been recognized as an authority on environmental, food, drug, and product safety issues. He teaches crisis management at Johns Hopkins University and is the former chairman and CEO of Nichols • Dezenhall Communications Management Group, Ltd. His book *Rules for Corporate Warriors: How to Fight and Survive Attack Group Shakedowns* is a best-seller and has become the handbook for executives trying to stave off extremist attacks.

Rick Otis

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Rick Otis has spent many years in government, holding positions at the Office of Management and Budget, the Environmental Protection Agency, and as a Legislative Fellow. Mr. Otis also served as director of federal government affairs at the American Plastics Council and has operated his own consulting firm that focused on environmental policy and communications issues.

Fred L. Smith, Jr.

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Fred L. Smith, Jr. is president of the Competitive Enterprise Institute, a free-market public policy organization he founded in 1984. Mr. Smith is a popular guest on many radio and television programs. In addition, he has written or edited several books on regulation, including *Environmental Politics: Public Costs, Private Rewards*, and has contributed chapters to *Corporate Aftershock, Global Warming and Other Eco-Myths, and Market Liberalism: A Paradigm for the 21st Century*, among others.
Brendon Swedlow

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Brendon Swedlow is a professor at Northern Illinois University, where he teaches courses in environmental policy and public law. Dr. Swedlow studied under the pioneering political scientist Aaron Wildavsky, acting as the primary research assistant on Wildavsky’s final book, But Is It True? A Citizen’s Guide to Environmental Health and Safety Issues. He has also worked on the books Culture and Social Theory, and Federalism and Political Culture. Before joining NIU, Dr. Swedlow was a research fellow at Duke University’s Center for Environmental Solutions.
About Competitive Enterprise Institute
The Competitive Enterprise Institute is a non-profit, public policy organization dedicated to the principles of free enterprise and limited government. We believe that consumers are best helped not by government regulation, but by being allowed to make their own choices in a free marketplace. Since its founding in 1984, CEI has grown into an influential Washington institution with a team of nearly 30 policy experts and other staff.

We are nationally recognized as a leading voice on a broad range of regulatory issues ranging from environmental laws to antitrust policy to regulatory risk. CEI is not a traditional “think tank.” We frequently produce groundbreaking research on regulatory issues, but our work does not stop there. It is not enough to simply identify and articulate solutions to public policy problems; it is also necessary to defend and promote those solutions. For that reason, we are actively engaged in many phases of the public policy debate.
We reach out to the public and the media to ensure that our ideas are heard, work with policymakers to ensure that they are implemented, and, when necessary, take our arguments to court to ensure the law is upheld. This “full-service approach” to public policy helps make us an effective and powerful force for economic freedom.

**About National Media Inc**

National Media Inc is an award-winning public affairs strategic consulting firm and has been providing winning campaign and media strategies to corporations, coalitions, trade associations, and candidates for over twenty years.

A full-service, independent firm, NMI strives to navigate our clients through a complex and ever changing business, philanthropic, regulatory, and legislative environment.

Whether defending a business model and protecting a corporation’s reputation, or seizing opportunities at the ballot box in the legislature and the marketplace, National Media combines political experience with public affairs insight to reshape the internal and external operating environments so that businesses and organizations can achieve their goals.

Sometimes we use television, radio, or print advertising. Other times we might identify a third party advocate to lend credibility to a client’s message. We may use media or public relations to find solutions to client problems.

No matter the media outlet, we always begin with strategies devised by seasoned, senior communications professionals who are experts in messaging, media, advertising, research and public relations. Our team—veterans of Fortune 500 companies, leading trade associations, politics, public relations and state and federal government agencies—is dedicated to one simple goal: winning for our clients with integrity and efficiency.