

## **Research in Brief**

# **Canadian Political Consultants' Perspectives about Political Marketing**

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**ABSTRACT** *This research in brief explores Canadian political consultants' practices in political marketing, exploring whether they are, as democratic critiques of marketing often argue, encouraging politics to become poll-driven, and whether they fit into previous international studies on consultants in other countries, especially the United States. Drawing upon qualitative data collected from interviews with key practitioners in Canada and from Canadian news sources, it considers how political consultants utilize market research, communication, and strategy. It also considers the potential impact of the use of political consultants on politicians' decisions and leadership. It concludes that Canadian political marketing does not fit into an idealistic, realistic, or cynical view of political marketing but is a more complex synthesis and thus the democratic impact is more varied and debatable.*

**KEYWORDS** *Political consulting; Political marketing; Political communication; Democracy; Canada*

**RÉSUMÉ** *La présente recherche explore les pratiques de marketing politique des consultants politiques canadiens. Se basant sur les critiques souvent formulées au marketing politique à l'égard de sa portée démocratique, nous nous demandons si les consultants encouragent la dynamique d'une politique menée par les sondages. À partir d'entrevues avec des praticiens canadiens et d'analyses de bulletins d'information et d'articles de journaux, nous examinons la façon dont les consultants déploient la recherche de marché, les communications et les stratégies dans le cadre de leur fonction. La recherche considère également les impacts du recours aux consultants sur le leadership des politiciens. En conclusion, les implications du marketing politique sur la démocratie canadienne sont complexes; elles ne correspondent ni à une vision idéale, ni à une vision cynique.*

**MOTS CLÉS** *Consultants politiques; marketing politique; communication politique; démocratie; Canada*

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Much is known about political consultants in the United States, in Western Europe and, to a lesser extent, around the world (Johnson, 2002; Magleby & Patterson, 1998; Medvic, 2003; Novotny, 2000; Plasser, 2000; Plasser & Plasser, 2002; Sussman, 2005; Thurber, 2000). For some reason Canadian practitioners have avoided study of this kind. Questions about American political consultants asked by Thurber (2000, p. 2) are thus very much applicable in Canada: what do political consultants believe, what do they do to win, and what are the implications of their work for democracy? This research brief draws upon in-depth interviews with party insiders to document baseline knowledge about the use of, and attitudes toward, political marketing by Canadian political consultants.

### **Review**

Political marketing is a cross-disciplinary field that engages literature and practices in marketing, communication, and political science. It is foremost a philosophy characterized by an elite responsiveness to the political marketplace, such as by holding a market-orientation, by being in touch with the citizenry, and by reflecting public preferences (Lees-Marshment, 2001; Newman, 1994; Strömbäck, 2007). Political marketing is an attitude to politics that informs and prevails throughout an entire organization. Research intelligence gathered through opinion polling, focus groups, interviews, and even role playing is used to inform political communication, strategy, the political “product,” the overall political brand, and tactical decisions such as positioning and opposition research. In theory, political marketers will design products and services that respond to public needs, wants, and demands, which requires some altruism given that the greater public good must be prioritized over a politician’s, party’s, or advocacy group’s preferences. In practice, this idealism is at odds with the philosophy of political consultants, who advise their clients about using marketing for their own self-advantage.

Political consultants provide a variety of strategic advice and services. Johnson (2002) suggests that the top tier of consultants is comprised of strategists and pollsters such as James Carville and Karl Rove; at the second tier are specialists such as media buyers and speech writers; and at the third tier are vendors of campaign software and literature. He remarks that the export of American political consulting has been least successful to parliamentary systems given the infrequency of elections and the strength of political parties whose staff have expertise. Consequently in Canada it is believed that there is insufficient business “to support a consultant who does nothing else” and so there are only specialists in advertising, public relations, management, media development and production, fundraising, and opinion research who periodically get involved in politics (Shwetz & Yonin, 1997, p. 390). These Canadian specialists work for lobbying, media, and opinion research firms and may have previously been employed by a political party. They nevertheless fit the definition of a political consultant because they are paid to provide advice and services to candidates and political campaigns; the ones whose salaries are paid exclusively by a political party or interest group are differentiated as “professional” consultants (Medvic, 2003).

Perhaps not surprisingly, in international research of political consulting and political marketing such as by Plasser (2000), there has been little expression of interest in

the Canadian case. Yet in recent years the services of Canadian party and media consultants have been supplemented by a variety of boutique consultants as part of an outsourcing trend that is sustained by competition, declining volunteerism, interparty collaboration, and stable party financing (Cross, 2004; Esselment, 2011; Flanagan, 2009). In particular, within the Conservative party a political marketer has been using research data to inform the design of micro policies such as targeted tax credits, and these have been communicated to small segments of the electorate by narrowcasting in regional, ethnic, and sports media. The practice of political marketing has thus been emerging in Canada, but there is not yet documented knowledge about the associated views of domestic political consultants, and there is insufficient awareness about the implications of the transfer of related techniques and ideas from American consultants.

### **Research design**

We draw upon two sources of data. The primary source involved baseline depth interviews with Canadian practitioners.<sup>1</sup> Elite interviews can provide “textural depth as well as empirical strength” on subject matter that occurs behind closed doors (Lilleker, 2003, p. 208; see also Aberdach & Rockman, 2002; Berry, 2002). However, party competition and the centralization of communication in Canadian federal politics have made it difficult to secure interviews with party insiders who are not averse to discussing “secrets.” Identification of Canadian political consultants is also challenging; lists of political consultants that are used in other countries (Medvic, 2003; Plasser, 2000) are incomplete in Canada. To develop a respondent pool, a list was prepared of high ranking party strategists and media pollsters mentioned in published accounts of the 2006 and 2008 Canadian general elections, and this was supplemented by a snowballing technique of pursuing referrals from respondents (also used by Magleby & Patterson, 1998; Plasser, 2000).

Qualitative data were collected through 14 in-depth interviews with Canadian political consultants, taking place during the summers of 2009 and 2010. Respondents were former or current Canadian strategists who at the time of being interviewed were, with the exception of one party staffer, employed in the private sector (i.e., 13 political consultants and one professional consultant). These were recent party and professional marketing consultants, former senior advisors to the prime minister, government relations consultants, and party communications personnel who now worked as political advisors, advertising directors, opinion researchers, speechwriters, and general government strategists. Views from Conservative party, Liberal party and New Democratic Party (NDP) personnel are represented, including from Patrick Muttart who was the Conservative party’s political marketer. Generic questions included what worked and did not work in their role, what barriers were faced, and what impact the practice of political marketing appeared to have on democracy. Interviews also employed an inductive methodology involving an “absence of standardization” (Sarantakos, 2005, p. 270) which allowed respondents to organize their answers within their own framework (Aberdach & Rockman, 2002, p. 674). The result is a compilation of data that is able to be generalized and is broader than a case study of a single event, organization, party leader, or prime minister.

Elite interviewing should ideally be reinforced by another data source to further validate the initial qualitative findings (Lilleker, 2003; Medvic, 2003). As a supplement we reviewed remarks made by party insiders that had been recently reported in major Canadian news outlets. In a climate of party secrecy and message control, media content analysis is a useful way to further document insider information, and yet Giasson's (2012) analysis of Canadian broadcast media indicates that the term "political marketing" is foremost an academic expression. Consequently, media database LexisNexis Academic was used to retrieve Canadian news items with terms and connectors to the related keywords "attack ad," "party pollster," "political communications," "political consultant," and "political fundraising" from the period immediately preceding the call of the 2008 election campaign on September 1, 2008 through to February 3, 2011 when the federal parties launched a fresh round of negative advertising.<sup>2</sup> The content of these secondary sources is a useful supplement in the absence of scholarly literature and the limited number of party insiders who are willing to be interviewed.

## Findings

Our analysis identified the following themes in Canadian political marketing and political consulting.

### *Market intelligence is more than polling on party popularity*

At the behest of Canadian political consultants, the monitoring of the leader's image and party brand is supplanting attention that is paid to horserace polling numbers. Opinion surveys involve more than just dichotomous questions, especially on controversial issues, which entail probing and a search for qualitative insights derived from focus groups. Opinion research emphasizes extrapolating voter motives and emotions, such as aspiration. It also involves collecting knowledge about which criticisms of opponents will resonate with electors. Where feasible, political consultants encourage party personnel to observe focus groups, which can help them understand "how unimportant some of the things that they thought were extremely important were to average Canadians" (A. Evershed, personal communication, May 29, 2009). The source of research intelligence is less narrow than opinion polls and focus groups. It includes timeworn methods such as public consultations, which are dominated by interest groups' positioning; feedback from backbench Members of Parliament (MPs); and even informal eavesdropping on public conversations. Canadian political consultants are also soliciting knowledge about best practices from party professionals across Canada, the United States, the United Kingdom, and Australia. Moreover they are using technology to engage in opposition research, such as scrutinizing an incumbent's voting record, and are monitoring blogs and using Wikipedia. In the words of one former party strategist,

You can't just govern your principles from opinion research, but you can certainly refine them. You might have 100 things that you stand for, but no single voter, no collective voting block is going to be able to process them. So, we did a lot of market research to hone in on the things that we were talking about that really mattered to people. What are going to be their ballot drivers? What are they going to go to the polls and actually cast their ballot deciding?

What are the most important issues for them? (L. Noble, personal communication, May 20, 2009)

Not long ago only a handful of Canada's national parties could afford polling, but today pollsters are ubiquitous. In the 2008 election, three parties used new voter profile software that analyzed ethnicity, social values, and income levels to inform strategy in battleground ridings, and they also administered focus groups in Mandarin and Punjabi (Jiménez, 2008). Unaffiliated pollsters release standard political data to the media, but it is the deeper storytelling, such as party branding, which provides richer information for political journalists (e.g., Akin, 2010). Canadian parties, political journalists, and the attentive public are all seeking deeper insights than just voting intentions and have a range of ways to access these data. Nevertheless, the emphasis on winning elections remains, as one consultant pointed out:

how [political marketing is] being used for the most part is: 'What do we need to do to win the election?' Which is a very different question from: 'What do we need to do to make a good country great? What do we need to do to inspire people to be all that they can be? What do we need to do to create confidence in our public institutions? What do we need to do to create a safe society? What do we need to do to create a trusting society?' None of that addresses point A, which is: 'What do we need to do to win the election?' (G. Hyder, personal communication, May 28, 2009)

*Market research needs to be interpreted carefully to produce useful advice for politicians*

Political consultants are aware of the limitations of polling and focus groups. They recognize that experience and skill is needed for solid interpretation of data. The best researchers identify client advantages and advise how to act on results. They use market research to determine the best way forward and to avoid policy "minefields" (A. Evershed, personal communication, May 29, 2009). They understand that political marketing is as much art as it is science, given that research data need to be interpreted and used to inform decisions. This may involve figuring out how to tell an evidence-based story to clients. It means shaping the research outcome to fit with a politician's personality or track record or with a party's brand or history; it does not mean shaping the politician or the party to unconditionally follow electors' expressed needs and wants. It may inform communications decisions to, in the words of one party strategist, "get the public to think in a way that maybe they haven't thought of before" (J. Duffy, personal communication, May 20, 2009). Press reports add that polling data inform leader speeches and interviews and that a party leader may commission focus groups to figure out how to sell a preferred policy (Duffy, 2008; Taber, 2010). Party pollsters can also present positive interpretations of data in an effort to rally the troops, such as advising that time can be an ally or to suggest momentum (Taber, 2008b).

*Party leaders decide how to use market intelligence*

The centralization of power within a party leader's office means that political consultants who are members of the leader's inner circle hold considerable sway. However, unlike popular impressions of political consultants being puppet masters, in Canada

there is no such illusion—it is recognized that the consultant’s role is to provide information and it is the party leader who makes the decisions. Some leaders want to follow opinion polls while others are analytical, but all concerned, especially if a leader is a head of government, recognize that there are too many issues and decisions to poll about. For leaders of a mass party, satisfying all party supporters restricts opportunities for market growth, because decisions informed by research involve a fine balance between reaching out to a new tier of potential supporters and risking “upsetting and alienating the base who will either stay at home or flee” (B. Lavigne, personal communication, May 28, 2009).

Opinion research data are thus one of a number of considerations in making a policy decision, such as internal resources, party support, costing analysis, communications planning, and delivery logistics. Consequently, Canadian political consultants have little respect for leaders who want polling to make decisions for them, but they admire those who have an objective and then scrutinize the data to inform the path forward to achieve that goal. For instance, Ian Brodie, former chief of staff to Prime Minister Stephen Harper, explained that Harper “is an extremely rigorously analytical guy, and so on strategic issues, on marketing issues, on branding issues, on policy issues, on organizational issues, on parliamentary issues, on rhetorical issues—you really have to have your case well thought through to get through the door of the office. He would engage, read everything you sent to him” (I. Brodie, personal communication, May 29, 2009). Conversely, internal power struggles among the leader, party stalwarts, and consultants may occur. Party pollsters can be pushed out of the leadership circle amidst the pressure of a failing campaign (Taber, 2008b). Politicians need to be forthright with their advisors, who otherwise may be faced with operating outside of their sphere of expertise, as in the case of a leading Toronto mayoral candidate embroiled in a sex scandal who lied to his political consultants, turning them into damage control specialists (Diebel, 2010). Yet sometimes party insiders do pull the strings: in 2008, strategists delayed releasing the Conservative platform to guard against Harper communicating it poorly, while their Liberal counterparts aired negative ads despite the party leader’s objections (Bryden, 2008).

*Market researchers and political strategists need a good relationship with their client(s)*

Political consultants informed us that Canadian politicians need to sense loyalty and trust in their advisors. Sometimes this involves bringing along personnel who have previously provided guidance in leadership contests or lower level election campaigns. Political consultants and campaign managers are often recruited from within the party or are former party staffers loyal to the party leader, though between elections these consultants may advise corporations, advocacy groups, and unions in a manner that crosses over into government relations and lobbying (Hunter, 2009; Naumetz, 2011). In some cases, American political consultants are hired by opposition leaders, such as Ontario Liberal leader Dalton McGuinty, who received advice in Chicago and Washington from consultants including Democrat David Axelrod (Blizzard, 2008). Conversely the NDP, which in the past has encountered internal dissent over the hiring of

American consultants, engaged trusted Canadian and Québec advertising agencies that had previously never done political advertising (Wells, 2008).

Party leaders can be intimidating, so it is often difficult for strategists to provide frank advice, especially to heads of government, for whom the stakes are higher. Consultants have to figure out how to communicate and develop a relationship with their clients. They are aware of the need to convey the truth and to deliver value in the face of temptations to tell their clients good news or what they want to hear. Even when delivering frank advice, political advisors can fail when a politician refuses to listen or accept their guidance. Thus, market intelligence has to be sold to politicians in a manner that is consistent with the principles and self-image of a party, leader, and/or candidate. For instance, in the months leading up to the 2008 campaign, Liberal leader Stéphane Dion stopped talking with party pollster Michael Marzolini when Marzolini advised against a carbon tax, which was Dion's preferred policy instrument, and the pollster delivered stern advice via internal memos to Dion, who had insulated himself with loyal supporters (Bryden, 2008; Duffy, 2008). By comparison, under Dion's successor, Michael Ignatieff, the same pollster briefed Liberals at caucus retreats, discussing not only regular horserace and issues polling, but contextual data such as that only 15% of Canadian electors pay attention to federal politics (Taber, 2008a, 2011).

*Good communication is an essential component of political marketing*

Political consultants interviewed for this research brief repeated the mantra that poor communication can derail a well-researched and well-designed political product. They recognized that image management, agenda setting, and media framing are essential to win over public opinion. Communications personnel need to understand public policy and policy personnel need to have an appreciation for communications considerations. Consultants explained that the rebranding of a political party is fraught with challenges, viewed e-campaigning with suspicion but as a necessary tool, and felt that research-based (i.e., truthful) negative advertising is a useful communications tactic.

*Governing parties may have a resource advantage but day-to-day management makes behaving strategically difficult*

When in opposition, political parties have the fewest resources and so are least able to afford political consultants, but they may have the most time and flexibility to respond to opportunities and prepare for an election. Conversely, when in government political parties have considerable access to consultants and advisors, but senior executives' attention is diverted to daily management of the government and issues. Governing parties also face pressure to deliver on their promises which constrains their options and ability to respond to strategic marketing advice. Party consultants often remark on their role as a firefighter, dealing with daily issues management, which inhibits their ability to define an agenda; one consultant referred to this as "the tyranny of the urgent" (C. Rogers, personal communication, May 19, 2009) which can be countered only with a lot of planning, discipline, and message control. The leadership circle in a governing party is thus so preoccupied with running the government and dealing with party issues that they cannot focus on preparing for the next election campaign. Conversely, within a non-government party, the absence of political marketing can be used to publicly position a fringe party as a grassroots alternative, or the recommendations

of advisors to initiate negative advertising can be dismissed by a leader as financially irresponsible (Green, 2008; Laghi & Clark, 2008).

We did not detect a presence of fundraising consultants in Canadian politics; rather, political parties collect market intelligence to inform their own fundraising operations. Party fundraisers have imported American techniques to regularly seek small donations from thousands of supporters, most notably the Conservative party which maintains a formidable database of donors. Senator Irving Gerstein has explained that the party has “created complex, leading-edge fundraising techniques such as data-mining, segmentation, targeted marketing and relationship management, all in an effort to move our pool of identified supporters up the support pyramid from supporters to members to donors” (Chase, 2008; see also Flanagan, 2009). By comparison the opposition Liberals have pressured their MPs to fundraise and maintain a pool of party members under threat of the leader not signing their nomination papers (Laghi & Taber, 2009). A financial advantage is a political management advantage insofar as it provides greater access to research intelligence and marketing communications. While both parties have sought to earn press coverage by releasing research-based negative spots online and by launching attack websites, only the governing Tories have been able to make significant media buys to reach a larger audience, which damaged Dion’s and then Ignatieff’s personal brands.

#### *Canadian political consultants are net importers of innovative tactics*

While American-style techniques continue to be imported by Canadian political parties there is only a mild suggestion that Canadian innovative ideas will be exported. Recent evidence of the ‘Americanization’ of Canadian politics includes the hiring of political consultants to prepare party leaders for the mid-campaign election debates and, inspired by Republican media tactics, in 2010 the governing Conservatives filed a complaint that the Canadian Broadcasting Corporation’s pollster, a known contributor to the Liberal party, had publicly offered strategic advice to the Liberal opposition (Hurst, 2008; Peat, 2010). To date only event-specific examples, the most memorable of which remains the notorious negative advertising against Jean Chrétien in the 1993 election, have been exported from Canadian politics. But a new development is that ideas can now be exported via online campaigning, as indicated by the mock attack ad against Winnipeg’s mayor, sponsored by the fictitious ‘People Against the Kicking of Kids in the Face’. The homemade spot decried the mayor (accidentally) kicking a child in the face at a charity soccer game, then went viral on YouTube, and was treated as real by American bloggers and was celebrated by major American news outlets (Kives, 2010).

#### **Conclusions**

Canadian political consultants believe that marketing has become a permanent fixture in Canadian politics and governance. Rather than see marketing as a philosophy, they treat it as a tool, one that can be used to help Canadian politicians carve up the market through segmentation and to create new themes that attract enough support to achieve elite goals. They recognize that their use of political marketing is foremost a means toward achieving a client’s goals, which includes attracting the support of like-minded citizens, and that this may not improve the relationship between politicians and the public. They believe that political marketing in Canada is focused on winning.



To win, Canadian political consultants use marketing proactively to help achieve a range of goals. They take care to analyze and interpret market research to produce useful advice to politicians about how to achieve their goals. Inspired by consultants in the United States, the United Kingdom, and Australia, they have moved past horserace numbers and delve into voter emotions and branding while seeking to understand opponents' weaknesses on these levels. This does not mean that Canadian parties are following the poll-driven route typically associated, fairly or not, with the United States. Rather than engage in poll-driven politics, where research identifies voter demands and politicians follow, there is more of a merging of market demands and elite goals in Canadian political marketing. Neither market research nor the consultant dictates what politicians do—it depends on the relationship that consultants have with politicians, and what the politicians decide to do. This can include achieving a politician's own policy goals and resisting change, as much as responding to popular will. Marketing can simply be used to improve communication, without changing the political product.

The implications of the work of Canadian political consultants on Canadian democracy are mixed. The broader needs and wants of Canadians can become subservient to the emphasis placed on appealing to a narrow band of the electorate that shares ideological values with a political party. Complex policy is reduced to simple messaging, and broad government programming is shelved in place of targeted tax credits and micro spending. Yet, practitioners and politicians find it harder to be strategic and reflective when in government, and this may explain the usual pattern of decline in support that parties experience once in power. That consultants utilize market research means they play a role in bringing public views to elite attention. When elites respond carefully, taking care not to overpromise, and to consider what is achievable, this can help voters feel listened to and promote a more trusting citizen-state relationship.

Does Canadian political marketing fit into an idealistic, realistic, or cynical view of political marketing? None of these; instead, it is a synthesis and is incremental. Elites are prioritizing research-identified elector demands to some extent, but then using them to achieve their own goals and are thus creating a mixture of following and leading. Political marketing in Canada is more pragmatic, risk-averse, and underfunded compared with the intensity of some American political marketing. However, it is unclear whether this is affecting democracy for the better or for the worse, as the role of marketers in Canadian politics and governance has become more complex. Whatever the impact, the use of political marketing is playing a significant role in changing the relationship between politics, the press, and the public, but further research is needed to ascertain the true nature of such change.

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## Notes

1. We draw upon some previously unreported data collected for a comparative research project (Lees-Marshment 2011, 2012). Media data were collected for the exclusive purposes of this research brief.
2. We reviewed over 800 Canadian news items. These included 276 items with the term “attack ad,” 103 with “party pollster,” 87 with “political communications,” 251 with “political consultant,” and 94 with “political fundraising.” These frequencies include multiple occurrences of the identical wire news item across news outlets, such as 15 newspapers running a story from the Canwest parliamentary bureau about the Tory brand on December 16, 2010. Searches for related concepts, including “political marketing,” resulted in either a large volume of irrelevant hits (such as profiles of unrelated corporate business activity) or generated no results whatsoever.

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