

Anxiety, Aspiration, and Agency: Refocusing America's Tax Debate for Working People



About This Guide

WHAT IS THIS GUIDE?

As wealth inequality in the U.S. continues to rise, and we face the imminent threat of renewed or expanded tax cuts for the wealthiest Americans, [Excessive Wealth Disorder Institute \(EWDi\)](#) believes that **we are at a critical moment to grow long-lasting and widespread support for a just and inclusive economic system rooted in shared prosperity, government accountability, and a commitment to societal well-being.**

We believe that one important aspect of achieving that vision is to **reach Americans who are persuadable – but not currently in our base of supporters** – with messages that will help them become more supportive of progressive economic policy. This includes information that may help fill their knowledge gaps, as well as narrative and story-based content.

To create effective messages on the politically-heated and emotionally-complex topics of excessive wealth and progressive tax policies, EWDi partnered with [Wonder: Strategies for Good](#) to conduct deep audience listening, qualitative research, and qualitative message testing.

This guide **shares our research findings and resulting pressure-tested messaging recommendations** that have shown effectiveness with persuadable audiences.

WHO SHOULD USE THIS GUIDE?

This guide is intended for anyone seeking to communicate with a broad swath of people, including those who lean ideologically moderate but are persuadable, to increase their support for progressive policies to reform the tax code and address excessive wealth concentration in the U.S.

This guide might be helpful if you are:

- A communications professional developing a messaging campaign to expand your base of supporters on progressive economic policies;
- An advocate seeking to build public momentum behind tax reform proposals and addressing wealth inequality;
- A policy expert working to create an ‘elevator pitch’ that helps more Americans understand the problems and solutions you are working to solve;
- And more!

About This Guide

WHY DID WE CREATE THIS GUIDE?

Our strategy of reaching persuadable audiences, and the creation of this guide, is based on two important insights:

1. Over and over again, **polling shows that [Americans support higher taxes on the wealthy](#)**. Yet, when it comes time for them to vote for the policymakers and policies that will make progressive economic reform happen, we see that their **support falls short of a strong and consistent majority**.

The polling numbers indicate that the support can be there; the qualitative audience research we conducted and share in this guide can **help us understand why their support becomes shaky or inconsistent at the ballot box**, and what's getting in the way of more robust support from persuadable audiences.

2. There are many excellent organizations and individuals in this field already working to reach a broader audience. We hope this guide provides evidence-based tools for such organizations to continue and expand upon their work, and to gain new insights about how to reach their audiences to **translate positive polling responses into actionable results in policymaking and at the ballot box**.

WHAT AUDIENCE(S) ARE THESE RECOMMENDATIONS FOR?

The messaging recommendations in this guide were tested with a **racially and geographically diverse audience that leans more ideologically moderate but is able to be persuaded**. Our messaging was tested for effectiveness with audience members who self-identified as Democrats, Independents, and Republicans. Representative reactions from research participants across the political spectrum are quoted throughout this guide.

For more about our audience, [see pages 12–13](#).

WHERE DID THESE RECOMMENDATIONS COME FROM?

Wonder: Strategies for Good conducted audience research from July–December 2024, including: an audit of existing public opinion research on billionaires and U.S. tax reform; a media coverage and social media audit; in-depth qualitative interviews with audience members in two phases, Mindset and Qualitative Message Testing; and focus groups with audience members in the Qualitative Message Testing phase. (For more detail on the research methodology and advisory committee, [see pages 54–55.](#))

In addition to primary audience research, our recommendations were informed and supported by research in psychology, neuroscience, and public interest communications. For more about some of the psychological and sociological insights underpinning our recommendations, [see pages 10 and 11.](#)

An important note on language and phrasing:

In our research, we tested references to **‘working people and families’** as a relatable description of everyday Americans that has resonated well in other research ([for example, see here](#)). In these recommendations, we also refer to ‘working people and families’ since we found, similar to previous research, that audience members responded positively to this phrasing.

Although our materials did not specifically test the phrase **‘the middle class,’** many audience members spontaneously made a connection on their own between ‘working people’ and ‘the middle class,’ and often used those phrases near-interchangeably. **This suggests that this audience closely associates these ideas, and likely responds to them similarly.**

Our tested messages, and our recommendations, do not use the phrase **‘low-income people / families.’** Previous work has found that Americans – including those who might themselves qualify as low income – often react negatively to framing that defines people by, and centers, their problems ([e.g., see more here on asset- vs. deficit-based framing](#)).

TABLE OF CONTENTS

- 2 About this Guide**
- 6 Recommendations At-A-Glance**
 - 7 How do we know these recommendations work?
- 9 Understanding Our Audience’s Views on Billionaires and a Progressive Tax Rate**
 - 10 When it comes to billionaires and taxes, people are Heartwired
 - 12 Who is our audience?
 - 14 Two prominent narratives in the landscape
 - 15 Understanding our audience's views
- 20 Detailed Messaging Recommendations**
 - 22 What Works: Detailed Recommendations + Messaging Examples
 - 37 What Doesn’t Work: Detailed Recommendations + Messaging Examples
- 44 Suggested Responses to Narratives that Inhibit Progress**
- 52 Appendices**
 - 53 Appendix A: Full Tested Messaging Materials
 - 54 Appendix B: Detailed Research Methodology
- 55 Acknowledgements & Research Team**

Recommendations At-A-Glance

Our message testing found strategies that consistently worked or didn't work in creating positive mindset and policy support shifts* – **including some which may be surprising.**

Note: The recommendations here are based on our research to persuade audiences who are not already in our base. Some of the strategies that **did not work with this audience are likely still effective in messaging to a different audience with a different purpose – for example, mobilizing members of our base who are already supportive to take action.*

WHAT WORKS

1. Keeping the **focus on working people and families** as drivers of the economy.
2. Adhering to a **'strategically-neutral' tone through curated details and facts** that present 'both sides,' for example:
 - Bipartisan facts about America's tax history.
 - Specifically naming trickle-down as an economic theory that doesn't work; and contrasting it with the idea that working people and families drive the economy and should be prioritized in economic policies.
3. Elevating widely-accepted ideas like **simplifying the tax system and eliminating loopholes** that currently allow some to pay excessively low tax rates.
4. Equipping and amplifying messengers who can **demonstrate credibility and wholesome motivations for delivering their message** – such as (but not limited to) supporters who identify as wealthy themselves, community-oriented financial coaches and experts, and/or faith-based messengers.
5. Helping audience members **manage their own discomfort** around finance and **realize their own agency.**

WHAT DOESN'T WORK

1. Framing progressive taxes as a **punitive measure on the wealthy.**
2. Using language or a tone that reads as **partisan or skewed**, and/or as **categorical villainization of the wealthy** for having wealth.
3. Emphasizing the **unfairness of the wealth gap**, and/or the **power differential** between those with money and those without money, as the **central focus** of your message or story.
4. Emphasizing **what a progressive tax policy could pay for** as the **central focus** of your message or story.

How do we know these recommendations work?

Using these messaging recommendations, **we were able to influence positive shifts in our persuadable audience's opinions** about how wealth should be taxed, and their views on billionaires and large corporations.

These positive shifts occurred **even after they were exposed to both opposition and supportive content**, and are notable on such an emotionally complex topic – wealth and the economy – that audience members see as strongly intertwined with their day-to-day lives, sense of personal agency, and deeply-held values and identities.

For example, after seeing our test messaging, our audience shifted to be **more supportive of a higher tax rate on wealthy individuals' investment income:**

Interview / Focus Group participant responses (n=24) to the question:

If a person has a net worth of 50 million dollars and makes 5 million dollars a year NOT from work but mostly from investments, do you think their tax rate on that 5 million dollars should be:

- The same rate as the person making \$60,000, 14.9%
- A lower rate, less than 14.9%
- A higher rate, more than 14.9%

	Before seeing test messaging	After seeing test messaging
Same Rate	54%	↓ 33%
Higher Rate	42%	63% ↑
Lower Rate	4%	4%

How do we know these recommendations work?

Audience members also showed notable **positive shifts in mindsets that are important for long-term progressive change**. For example, **in their own words**:

BEFORE MESSAGING:

"Well, if we didn't have these people that are making \$50 million, the working class people wouldn't have a job. The rich contribute to other people, so it is a tough question [of whether to tax them more] because **you want them to make money so we can contribute to other people.**"

AFTER MESSAGING:

"The root of evil is the love of money, so **we ain't supposed to love money like that.** ...[Now, I agree more with the idea that 'the wealthiest 0.1% aren't contributing in line with what they've gained'] because of reading the stories you showed."

- *Hispanic man, Republican, Very Conservative, 61yo, from California*

BEFORE MESSAGING:

"**I do believe [billionaires] are innovators.** If you think about the wealthiest Americans like Mark Zuckerberg, Bill Gates, Elon Musk, Jeff Bezos, they just didn't get wealthy. If you have wealth, you can do whatever you want, but [these people] decided that they can create something. **I believe we are all better off** because Microsoft exists, because Amazon exists, because Tesla exists, SpaceX exists. **Without these billionaires this stuff wouldn't exist.**"

AFTER MESSAGING:

"**I think if you have more [wealth], then you have more to give.** I think that if you've been blessed by God, society, whoever has it, that if you've been given much that you have a responsibility to give back to the community that has given so much to you. **Someone who has \$50 million should be contributing a lot more to society both as a monetary amount and percentage amount** than someone making \$50,000. If you've got \$50 million and you end up giving the government \$20 million, you still have \$30 million, and that is at a 40 percent tax rate."

- *White man, Republican, Somewhat Conservative, 34yo, from Colorado*

Understanding Our Audience's Views on Billionaires and a Progressive Tax Rate

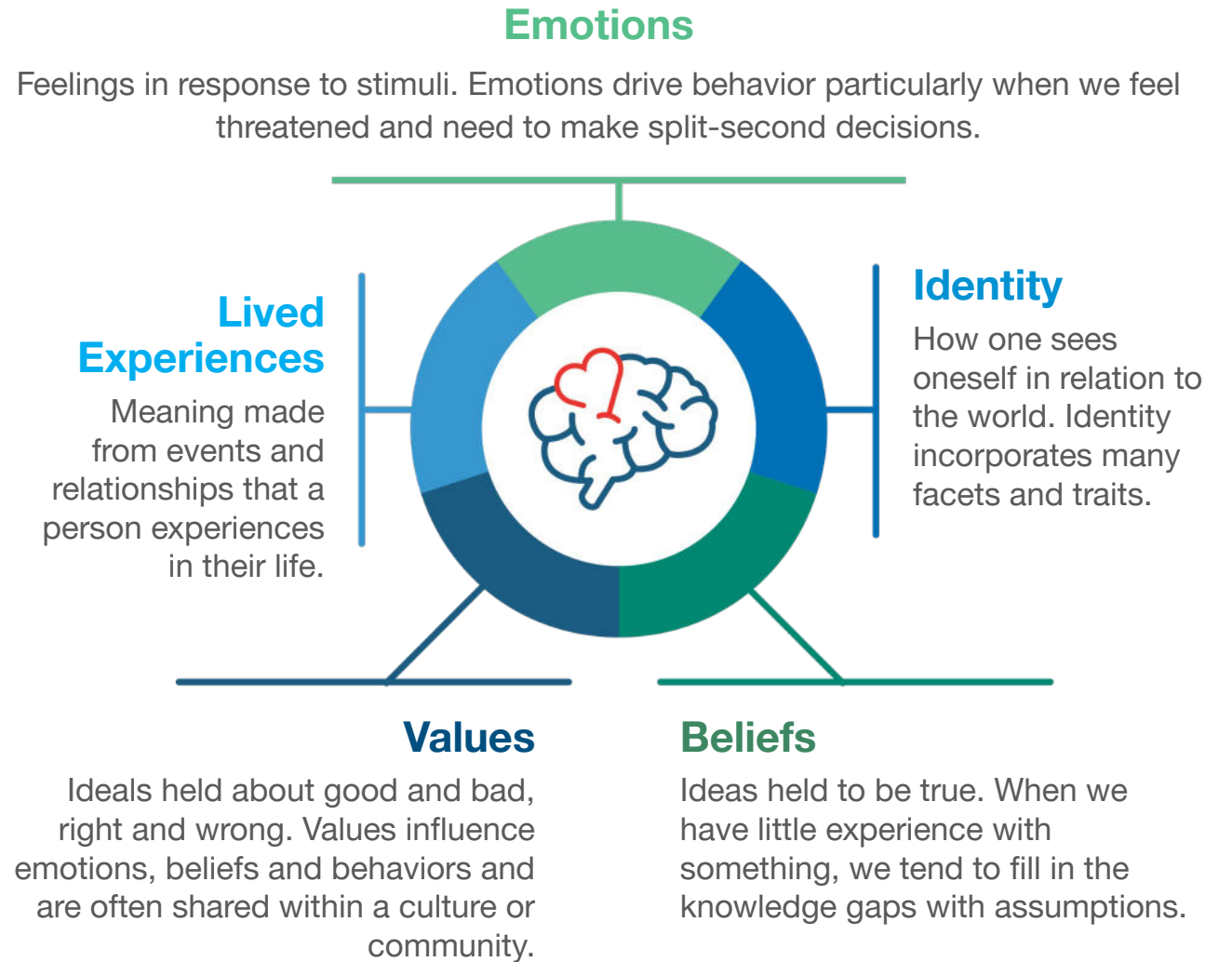


When it comes to billionaires and taxes, people are Heartwired

When it comes to their views on emotionally complex topics like wealth and taxes, people are Heartwired. Five Heartwired factors – **emotions, values, beliefs, lived experiences, and identities** – combine and collide to shape how they think and behave.

In this research, our audience often expressed ideas that might seem contradictory for some, but **are not contradictory or conflicting to them.**

Their **Heartwired factors** can help us understand how they make sense of these ideas.



When it comes to billionaires and taxes, people are Heartwired

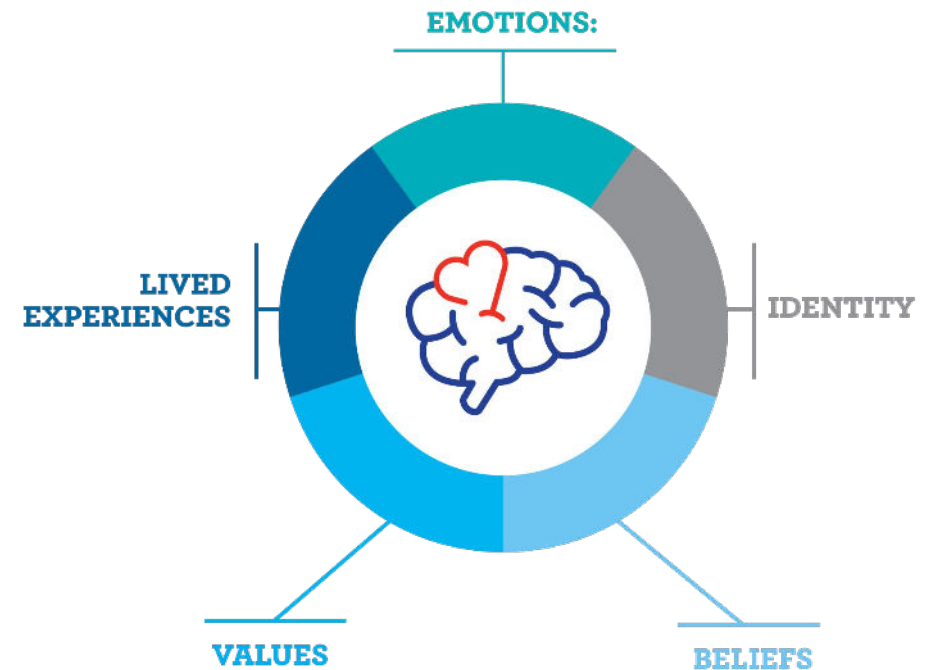
This persuadable audience strongly **values** fairness, cites **lived experiences** with government working ineffectively, and holds some negative **emotions** toward billionaires for using their money to buy power within our political system.

Yet, they also deeply **value** their own **self-identities** as hard workers, and therefore relate to what they perceive as billionaires' **values** of hard work and the desire to succeed. This leads them to also hold **positive beliefs** about billionaires and corporations as entities who create jobs and help the economy.

They often **feel** embarrassed or anxious when asked about wealth and financial systems – due to their self-perceived lack of knowledge on these topics and/or sensitivity around their own financial status – which can inhibit their sense of agency or desire for action.

Faced with anxiety about their own finances, they find **positive feelings** of hope and aspiration in the idea that if they work hard and take advantage of opportunities that come their way, they can someday be wealthy, too.

By understanding these underlying factors that ultimately shape this audience's support and opposition for our goals, we can create effective communications strategies to **reach them where they are and move them to be more supportive.**



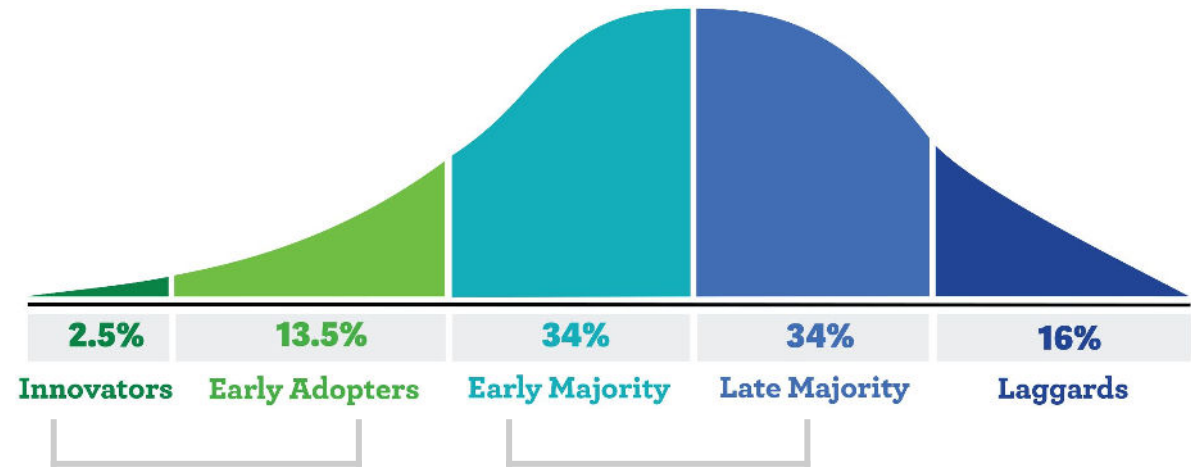
Source: Wonder: Strategies for Good; Goodwin Simon Strategic Research

Who is our audience for these recommendations?

In order to achieve majority support and build long-lasting political momentum behind progressive economic policies, we believe it is key to effectively reach and communicate to those who are not yet part of our base, but could be. In other words, **this research aimed to target Americans who may lean more ideologically moderate, and may be skeptical of progressive policy ideas, but are persuadable.**

One way to think about this audience is through the **Diffusion of Innovations theory: a sociological concept that shows how new ideas spread through a population**, eventually reaching a simple majority and then overwhelming support. **Innovators** are the first to adopt an idea, then ignite it among **early adopters**, who build support among the **early majority**. Eventually, the **late majority** follows suit, finally followed by **laggards**.

Our end target for these messaging recommendations are **those who are likely to be part of the early or late majority**. Our research was aimed at equipping innovators and early adopters (**that's you if you are reading this guide!**), who are working on or already support progressive economic policy, to communicate effectively with early and late majority audiences.



Innovators & Early Adopters:
Tax policy orgs, NGOs/experts in related fields, editorial boards, policy staffers, social media and news media influencers, etc.

Early & Late Majority:
Conflicted audience who leans ideologically moderate

This was our research audience and end target for these messaging recommendations.

Who was our research audience?

With the goal of reaching audience members who were likely to be in the **early to late majority** ([see page 12 for more](#)), our research audience – across 20 in-depth interviewees and 15 focus group participants – was recruited and screened for having **moderate views on a battery of statements relating to billionaires and the American economy.**

In addition, our research audience ($n=35$) **represented 15 different states and included a mix of:**

Gender	Female: 51% Male: 49%
Age	18–29yo: 20% 30–49yo: 40% 50–64yo: 40%
Race/Ethnicity	White: 35% Black/African American: 43% Latino/a/e/Hispanic: 13% East or South Asian: 9%
	<i>(Note: We intentionally included a higher-than-nationally representative number of Black/African American research participants, to meet one of our research priorities of better understanding Black audiences.)</i>
Political Ideology	Liberal: 37% Moderate: 46% Conservative: 17%
Political Party	Democrat: 57% Independent: 23% Republican: 20%
Self-Described Financial Situation	Really struggling financially: 12% Just getting by financially: 47% Financially secure and stable, but not wealthy: 41%
Household Income (annual)	Under \$25,000: 14% \$25,000 – \$50,000: 9% \$50,001 – \$75,000: 32% \$75,001 – \$100,000: 11% \$100,001 – \$150,000: 14% Over \$150,000: 20%
Education	Graduated high school: 6% Some college: 20% Associate Degree: 6% Bachelor’s Degree: 54% Postgraduate Degree: 14%
Rural–Urban Location <i>(*data only available for n=25)</i>	Rural: 14% Small Town: 4% Small City: 23% Suburb (of a large/midsize city): 36% Large City: 23%

Our audience is currently influenced by two prominent narratives

Through a landscape scan, we identified **two narrative themes about wealth, billionaires, and the economy** that are currently prominent in U.S. news media coverage and on social media channels. These narrative themes are **summarized here from our audience's perspective.**

We heard consistent statements by audience members in interviews and focus groups that embodied these themes, and that demonstrated how strongly our audience is influenced by them. It is important to note that **these two themes are not mutually exclusive.**

Audience members can, and often did, hold both of these ideas; for example, many saw the idea of billionaires and the American dream as **something to aspire to themselves, and a way to gain personal agency within a broken system** that is controlled by the wealthy for their own benefit while everyone else struggles.

Trapped in a Broken System

The **rich just keep getting richer.**

It's **unfair** that they get to to **take advantage of loopholes, harm the climate, and degrade our democracy** with no consequences while the rest of us **struggle to pay for basic necessities** and the **wealth gap widens.**

We need **drastic change**, but how will that ever happen?

(phrased from the perspective of how our audience experiences this narrative)

Billionaires Embody the Possibility of the American Dream

We should **aspire to be like billionaires.** We can all **follow their example** to improve our own circumstances and achieve the American Dream.

Taking away billionaires' freedom to **earn and keep as much money as possible** means **taking that freedom away from everyone.** Taxing the rich would also **hurt us all** because the rich **contribute to our economy** and **spur innovation.**

(phrased from the perspective of how our audience experiences this narrative)

At-A-Glance: Understanding our audience's views

On the following pages, we explore in greater detail **four key findings about our audience's mindsets:**

1

Audience members' feelings of agency are often drawn from **deeply-held identities around hard work, educating oneself, and making wise decisions.**

2

This audience **understands harms like wealth buying too much power in our political system,** and they value the idea of giving back what one owes. At the same time, they are concerned about increasing taxes on billionaires because they perceive billionaires to have worked hard and earned their wealth. **In their words, they see taking away that wealth as potentially 'unfair.'**

3

When it comes to tax rates, this audience very much **wants the system to be fair,** but has varying definitions of fair.

4

Distrust in government and institutions, belief that government is inefficient, and extreme wariness and sensitivity to partisanship are major challenges in the present moment. This audience is hesitant to support raising taxes on anyone — including the wealthy — when they believe that money will be spent inefficiently and/or without direct benefit to their communities.

1 Audience members' feelings of agency are often drawn from deeply-held identities around hard work, educating oneself, and making wise decisions.

In addition to valuing their own identity as hard workers who aim to educate themselves and make smart decisions, audience members also believe these traits can help them improve their financial circumstances.

These beliefs are not just aspirational; they are **deeply important for audience members' feelings of personal agency to make a good life for themselves and loved ones.**

In their own words:

"I think in the future I could become wealthy. I really believe that. I know if you have a goal and put your money toward it and work hard you will achieve it. **I want people to picture me in the future when they say 'billionaires.'**"

— *Black woman, Democrat, Moderate, 35yo, from New York*

"[Billionaires] got wealthy because of their situation or their opportunities so I don't knock them. ...**I really don't have a negative opinion about them. I wish I could be a billionaire.**"

— *Hispanic man, Democrat, Moderate, 43yo, from California*

"[When I think about billionaires, it's] an image of aspiration — what would I need to do to attain something like that? Have I been perceptive or resourceful enough to get along that path?"

— *White man, Republican, Moderate, 58yo, from Pennsylvania*

2

This audience understands harms like wealth buying too much power in our political system, and they value the idea of giving back what one owes. At the same time, they see taking away wealth as potentially 'unfair.'

While recognizing and sometimes **spontaneously referencing the harms of wealth buying power**, audience members are also concerned about increasing taxes on billionaires because they **perceive many billionaires to have worked hard and earned their wealth**.

They had consistent **negative reactions to statements that they saw as potentially 'unfair'**: for example, the argument that billionaires should be taxed just for being wealthy, or **messages that categorically villainized all billionaires or wealthy people**.

In their own words:

"I think the mass media is controlled by billionaires — who is controlling the narrative in our media? **...Everything is filtered through what the rich and powerful want us to see.**"

— *East Asian woman, Democrat, Moderate, 45yo, from Maryland*

"I agree with the fact that [the] wealth gap is increasing. And **I also agree that billionaires and rich corporations need to pay more taxes**. But **what I do not agree with is the tone of messages that sound somehow from a place of hatred**. It is like, 'we are not happy that you are billionaires' ...so hence they need to pay more taxes. That should not be the mindset. They actually need to pay more taxes because they are rich and they belong to the society we belong to."

— *Black man, Independent, Somewhat Liberal, 28yo, from Illinois*

"If an individual has accumulated wealth — **they worked for that. They should get to keep it**. They should get to prosper and make their own choices for their family and their household."

— *Black woman, Independent, Moderate, 35yo, from Minnesota*

3

When it comes to tax rates, this audience very much wants the system to be fair, but has varying definitions of fair.

While some audience members believe it's fair for those who have more to pay more, others believe fair means everyone paying the same flat tax rate.

Some expressed agreement with both of these ideas, further indicating the complexity.

In their own words:

"I don't understand why [the wealthy] are getting taxed less than working people. **We should be taxed the same.** It is not fair. ...**[It's compelling for me to hear from] a multi-millionaire who believes they should be paying higher taxes than people like me.** He is living it, and he understands that having all that money should be spread out more than hoarding it."

— *Hispanic man, Republican, Very Conservative, 61yo, from California*

"I don't think it is fair that just because you make more money, you **would get taxed more.** I don't know how that came into place."

— *Black man, Democrat, Moderate, 35yo, from Georgia*

"I just believe that we are all people. **We are all earning money and we should be taxed in a similar way.** It shouldn't matter what kind of job you have or how much money you actually pull in. **That to me sounds fair.**"

— *Hispanic woman, Republican, Very Conservative, 52yo, from California*

4

Distrust in government and institutions, belief that government is inefficient, and extreme wariness and sensitivity to partisanship are major challenges in the present moment.

This audience is hesitant to support raising taxes on anyone — including the wealthy — when they believe that tax revenue will be spent inefficiently and/or without direct benefit to their communities. **This led them to dismiss arguments with a central focus on what higher taxes can pay for** (e.g., schools, healthcare, etc.).

Audience members also quickly **dismissed and rejected messages or messengers that felt partisan or one-sided.**

In their own words:

“Lowering the tax rate, assuming **the ‘trickle-down’ effect – we don't know how effective that really is [for helping the economy.]** [On the other hand,] raising the tax rate – **we are assuming the government is going to get more money to have programs, but are we sure those programs are going to be well funded?** So to me it is a catch 22. Does either option really work?”

— *Black man, Democrat, Moderate, 35yo, from Georgia*

“[The statement that our tax system rewards bad behavior by allowing billionaires and corporations to avoid taxes while making record profits] is very inflammatory. **It is your typical stereotype of ‘big, bad, billionaires are evil.’ I think that is just very skewed.** Because I don't believe that. **I don't think everything is all bad and everything is all good.”**

– *East Asian woman, Democrat, Moderate, 37yo, from California*

Detailed Messaging Recommendations



Recommendations At-A-Glance

Our message testing found strategies that consistently worked or didn't work in creating positive mindset and policy support shifts* – **including some which may be surprising.**

Note: The recommendations here are based on our research to persuade audiences who are not already in our base. Some of the strategies that **did not work with this audience are likely still effective in messaging to a different audience with a different purpose – for example, mobilizing members of our base who are already supportive to take action.*

WHAT WORKS

1. Keeping the **focus on working people and families** as drivers of the economy.
2. Adhering to a **'strategically-neutral' tone through curated details and facts** that present 'both sides,' for example:
 - Bipartisan facts about America's tax history.
 - Specifically naming trickle-down as an economic theory that doesn't work; and contrasting it with the idea that working people and families drive the economy and should be prioritized in economic policies.
3. Elevating widely-accepted ideas like **simplifying the tax system and eliminating loopholes** that currently allow some to pay excessively low tax rates.
4. Equipping and amplifying messengers who can **demonstrate credibility and wholesome motivations for delivering their message** – such as (but not limited to) supporters who identify as wealthy themselves, community-oriented financial coaches and experts, and/or faith-based messengers.
5. Helping audience members **manage their own discomfort** around finance and **realize their own agency.**

WHAT DOESN'T WORK

1. Framing progressive taxes as a **punitive measure on the wealthy.**
2. Using language or a tone that reads as **partisan or skewed**, and/or as **categorical villainization of the wealthy** for having wealth.
3. Emphasizing the **unfairness of the wealth gap**, and/or the **power differential** between those with money and those without money, as the **central focus** of your message or story.
4. Emphasizing **what a progressive tax policy could pay for** as the **central focus** of your message or story.

What Works: Detailed Recommendations

WHAT WORKS	WHAT IT MEANS
<p>1. Keeping the focus on working people and families as drivers of the economy.</p>	<ul style="list-style-type: none"> ➤ This persuadable audience consistently demonstrates the most excitement and alignment when the central focus of messaging is on them, as opposed to the actions of wealthy people. ➤ While this audience tends to feel skeptical of the government’s ability to, or interest in, prioritizing working people, they do believe working people <i>should</i> be the priority. They therefore resonate strongly with the idea that the economy grows when working people have what they need to thrive: e.g. affordable health care, child care, and housing. ➤ This suggests the importance of referencing public programs through the lens of what they can do for working people, while also not making public programs the central argument for increasing taxes on the wealthy, which often triggers skepticism about tax revenue actually being spent effectively. ➤ Instead of centering wealthy people and their actions, frame policies as supporting working people or building the middle class, and emphasize the agency of working people and families in powering our economy.

Section continues on the next page 

What Works: Detailed Recommendations

WHAT WORKS	WHAT IT MEANS
<p>2. Adhering to a 'strategically-neutral' tone through curated details and facts that present 'both sides,' for example:</p> <ul style="list-style-type: none"> • Bipartisan facts about America's tax history. • Specifically naming trickle-down as an economic theory that doesn't work; and contrasting it with the idea that working people and families drive the economy and should be prioritized in economic policies. 	<ul style="list-style-type: none"> ➤ This audience is highly sensitive to partisanship, and quickly dismisses messages that they perceive as only telling one side of the story. ➤ On the other hand, they react positively to messaging that presents 'both sides' of an issue and allows them to arrive at their own conclusions. ➤ Curated facts (e.g. about the history of tax rates and discrepancies in current rates), presented without judgment or opinion, can help our audience reach their own conclusions that the current tax code is unfair.
<p>3. Elevating widely-accepted ideas like simplifying the tax system and eliminating loopholes that currently allow some to pay excessively low tax rates.</p>	<ul style="list-style-type: none"> ➤ Although exact definitions of 'fair' vary widely within our audience, the fundamental idea of fairness is a deeply-held value, and audience members react strongly and negatively to the idea that some pay excessively low rates compared to others. <i>(Note that they don't necessarily fault the wealthy for utilizing loopholes or paying low taxes, but rather, blame the system itself for having loopholes.)</i> ➤ Overall, this means that many members of this audience – including conservatives – have a strong appetite for simplifying the complicated U.S. tax system and eliminating loopholes.

What Works: Detailed Recommendations

WHAT WORKS	WHAT IT MEANS
<p>4. Equipping and amplifying messengers who can demonstrate credibility and wholesome motivations for delivering their message – such as (but not limited to) supporters who identify as being wealthy themselves; community-oriented financial coaches and experts; and/or faith-based messengers.</p>	<ul style="list-style-type: none"> ➤ This persuadable audience reacts very positively to messengers who hold credibility on the issue of taxes or finance – which may be related to their own feelings of personal embarrassment or anxiety on the topic of finances and navigating complex financial and tax systems. They also react positively to messengers who hold credibility because of their moral authority; for example, faith leaders. ➤ Regardless of who the messenger is, it is important to audience members that they name and demonstrate wholesome motivations for why they, specifically, have chosen to deliver this message. ➤ When hearing from wealthy messengers, it is important that that these messengers show how they are following through on their own calls to action, while also uplifting working people instead of centering the message on themselves. This can include, for example, giving back to the communities that made them wealthy, giving their workers raises, and/or proactively paying more taxes. ➤ The most important consideration when it comes to featuring a wealthy messenger is ensuring the focus of their message is on working people, not the wealthy person themselves.

Section continues on the next page 

What Works: Detailed Recommendations

WHAT WORKS	WHAT IT MEANS
<p>5. Helping audience members manage their own discomfort around finance and realize their own agency by:</p> <ul style="list-style-type: none"> • Naming and normalizing the complexity of financial and tax systems. • Modeling how everyday people can still win against the system if and when we work together. 	<ul style="list-style-type: none"> ➤ Our audience often feels personal embarrassment, shame, and anxiety around the topics of finance and wealth. These feelings can inhibit their sense of agency or desire for action, and stem from many factors, such as their own perceived lack of wealth, or feeling self-conscious about their amount of knowledge on financial topics. ➤ Messages and messengers who speak to America’s cultural discomfort around issues of wealth and money management, and normalize the complexity of these topics, can help audience members manage their discomfort. ➤ This audience finds such messages deeply relatable and therefore trustworthy, which can provide an important entry point for other ideas. These messages can also help them recognize their own agency by modeling how everyday people can still change a complex system if and when we work together.

What Works: Messaging Example #1

MESSAGING EXAMPLE THAT WORKS:

'Strategically Neutral' FAQ

How have the rich been taxed in the past?

Throughout the 1900s, under Democratic and Republican governments, rich people in the United States—those earning over \$3.4 million a year in today's dollars—had to pay about 90% of their income in taxes. This high tax rate made it hard to amass a lot of wealth, although it wasn't impossible. In 1963, President John F. Kennedy, who came from a wealthy family himself, asked Congress to lower this tax rate to under 70%. Then, in the 1980s, President Ronald Reagan lowered the top tax rate even more, first to 50% and then to 28%.

How are the rich taxed today?

For the past forty years, the richest people in the U.S. have paid very low taxes compared to the wealthiest people in other countries and compared to people with low or middle incomes in the U.S. This is because people pay less taxes on returns from accumulated savings than they do on money earned from work, which benefits those with more in savings and investments. Today, working Americans pay higher tax rates than rich Americans. For example, someone earning \$45,000 a year pays a tax rate of 14.9%, while someone making one million dollars or more a year pays a true tax rate of less than half of that, on average. While rates may vary individually, IRS records show that the wealthiest 25 people in America have paid a true tax rate of 3.4%.

WHY IT WORKS:

Audience members appreciated seeing a (curated) selection of facts about the history and evolution of tax policies, which helped **fill in an information gap** for them on this topic, without distracting or overwhelming them.

Seeing information about both Democratic and Republican administrations also helped audience members **feel greater trust that these facts were presented from a nonpartisan point of view.**

Seeing a factual comparison of what a wealthy person pays in taxes, compared to a person with an average income — presented without opinion or judgment attached — caused many audience members to **reach their own conclusions that this discrepancy is unfair.**

Example continues on the next page 

What Works: Messaging Example #1

MESSAGING EXAMPLE THAT WORKS:

'Strategically Neutral' FAQ

How are the rich taxed today?

For the past forty years, the richest people in the U.S. have paid very low taxes compared to the wealthiest people in other countries and compared to people with low or middle incomes in the U.S. This is because people pay less taxes on returns from accumulated savings than they do on money earned from work, which benefits those with more in savings and investments. Today, working Americans pay higher tax rates than rich Americans. For example, someone earning \$45,000 a year pays a tax rate of 14.9%, while someone making one million dollars or more a year pays a true tax rate of less than half of that, on average. While rates may vary individually, IRS records show that the wealthiest 25 people in America have paid a true tax rate of 3.4%.

WHY IT WORKS:

Note that there is an important balance to find when presenting statistics like these. Our first version of this test message referenced a lower 'true tax rate' of 1.9% based on a different set of data (payroll tax rate of Americans making at least seven-figure incomes). This lower rate was **dismissed outright by many audience members who thought it was so low that it must be a mistake or misinformation.**

Changing this statistic to 3.4% (for the wealthiest 25 people in America) triggered less skepticism in subsequent testing. Based on this, we do recommend referencing discrepancies in tax rates, but **advise using care in choosing those statistics to avoid triggering audience skepticism.**

What Works: Messaging Example #1

MESSAGING EXAMPLE THAT WORKS:

'Strategically Neutral' FAQ

What is the case for keeping taxes low on the rich?

Those who support the rich paying low taxes say that wealth from the rich trickles down to the middle class. They also support growing the economy by removing government regulation and union protections to support higher corporate profits. Supporters of low taxes on the rich point to the strong American economy as evidence for continuing to keep taxes on large corporations and the wealthiest low or even making them lower.

What is the case for raising taxes on the rich?

People who support raising taxes on the very rich say the economy grows when working people and families have tools and opportunities to contribute and innovate – including affordable health care, child care, and housing. They say that can only happen when the very rich contribute in alignment with what they have gained from the economy. They also say decades of low taxes have led to an unprecedented divide in wealth between the 0.1% and everyone else. Historians warn that wealth inequality at these scales has led to division and political unrest in other countries where it has occurred.

WHY IT WORKS:

Overall, audience members liked and valued that **this FAQ presented 'both sides' of the debate.**

This FAQ uses what we call a 'strategically neutral' tone that acknowledges both sides of the debate, and provides carefully curated facts without opinion or judgment – all of which **allows people to arrive at a conclusion on their own**, rather than triggering pushback by making audience members feel like they are being told what to do and think.

Because most members of our audience identify as working people, they had **positive reactions to seeing their own needs and interests centered in messaging.**

What Works: Messaging Example #1

In their own words:

Many audience members found the FAQ helpful and compelling, and appreciated that it filled in their own knowledge gap while explaining both sides of the debate.

“The FAQ gave me both sides of the issue. It said why some people have this perspective, why some people have that other perspective. The other [messages I saw] were sort of slanted in one direction.”

— *White man, Democrat, Somewhat Liberal, 50yo, from Delaware*

“That was really interesting to me to see a pattern. **It was really helpful to know [about tax rates throughout the 20th century] because I think a lot of people don't know that history.** That's helpful in terms of contextualizing what is happening.”

— *East Asian woman, Democrat, Moderate, 45yo, from Maryland*

What Works: Messaging Example #2

MESSAGING EXAMPLE THAT WORKS:

Letter-to-the-Editor from a Financial Literacy Teacher

My name is Jasmine Burton and I work at Greensboro Community Services. I teach free financial literacy classes to help people set and achieve their goals. I find it deeply rewarding to empower people to take control of their futures.

Recently a new father joined one of my classes. He works as an EMT, and wanted to feel more stable and secure in planning for his children's future. And like many people, he had no idea where to start. One evening he said to me, "Money is a sensitive topic. I feel a little embarrassed that I didn't already know some of these things. But then again, there's so much to know — between budgeting, savings accounts, 401Ks, taxes — it's a completely different language to learn. And there are so many traps to fall into, like credit card debt. I can't help but feel like all of this is confusing by design. How are people like me supposed to get ahead?"

WHY IT WORKS:

Audience members found the messenger **trustworthy and credible because of her knowledge and expertise in finance.**

They also appreciated that she shared a **wholesome reason for speaking up on this topic:** her work in the community to empower people to take control of their finances and build a better future. Audience members expressed that **they personally share these values and aspirations.**

Many audience members related to the story shared here, which **acknowledges and normalizes that money can be a sensitive topic**, as well as feelings of **embarrassment and overwhelm with navigating one's personal financial situation.**

What Works: Messaging Example #2

MESSAGING EXAMPLE THAT WORKS:

Letter-to-the-Editor from a Financial Literacy Teacher

His comment struck me because it made me realize that our economic systems are not designed to help people get ahead. For many folks like this father — who are working hard to provide for their families, educating themselves, and doing the best they can — the system feels like it's actually designed to keep them where they are or even make things harder.

I think we need to come together and ask ourselves: If hard-working people aren't benefiting in our current economic systems, then who is? And what needs to change so that more people are able to actually achieve their goals and the future they want for themselves?

WHY IT WORKS:

● **Personally relating to the author's story** about her EMT student helped audience members subsequently **follow her logic that hard-working people aren't benefiting in our current economic system.**

● Like the FAQ ([Messaging Example #1](#)), this story helped audience members to **feel agency in coming to their own conclusion.** Rather than being prescriptive or telling people what to think, the messenger presented compelling and relatable information, and then simply asked questions that invited the audience to reach their own conclusions. Because they trusted the messenger and related to the story she shared, many audience members **ultimately shared her conclusion that current systems aren't benefiting hard-working people like them.**

What Works: Messaging Example #2

In their own words:

Many audience members found the financial literacy teacher's letter to the editor to be personally relatable, and ultimately mirrored the author's conclusion that the system needs to change.

"I can kind of relate, or feel what [this author] is feeling, because especially throughout high school, they don't teach you no taxes or how to budget, or manage money, buy a vehicle, a house or anything like that. **You pretty much have to learn on your own."**

— *Black woman, Democrat, Somewhat Liberal, 24yo, from Illinois*

"[The author said] 'if hard-working people aren't benefiting, who is?' Everybody else above you, that is who is. The people you are working for. This is going to sound crazy but I think that maybe they need to tell people okay wait, you can't be that successful. You can't make that much money because you are just doing stupid stuff with it. **I think that maybe [we need to] start limiting how many millionaires can be in what state."**

— *White woman, Republican, Moderate, 54yo, from Ohio*

What Works: Messaging Example #3

MESSAGING EXAMPLE THAT WORKS: Letter-to-the-Editor from a Faith Leader

We can see God's hands at work around us. They are the hands of those doing healing – our doctors and nurses. They are the hands of artists who bless us with music and poetry. We clearly see His hands in our family – those who hold us and provide for us. They are the hands of working people – farmers growing our food, bus drivers keeping us safe, business owners showing up for us like we show up for them.

Our truest and best wealth is our community. The Bible teaches about false wealth. "Keep your life free from love of money, and be content with what you have, for God has said, 'I will never leave you nor forsake you.'" Paul warned us of the false prophets. He said we can know them by their lies. He also called them the "deceitful workmen" and said "they do not work on the same terms as we do." So we can know false prophets by their false words and by their false works.

People of faith should strive to stand against false prophets and stand instead with workers in our community whose hands are God's hands. I am proud to be part of the long tradition of faith leaders standing up with working people and advocating for the fair pay and working conditions everyone deserves.

WHY IT WORKS:

This messenger was described to audience members as a reverend, and **his position as a faith leader gave him moral authority and credibility**, especially among those who identified with a religious faith themselves.

Audience members with a faith background expressed appreciation for seeing **familiar teachings that spoke to their values**, like how money has the power to corrupt people, and that money should not be prioritized above all else.

The message prompted these audience members to reflect on examples from their lived experiences, and express **affirmation of their belief that money is not a measure of worthiness** and that we have a **shared responsibility to take care of our communities**.

Example continues on the next page 

What Works: Messaging Example #3

In their own words:

Many audience members – especially those who identified with a religious faith themselves – felt that the faith leader’s letter to the editor affirmed their own values around money, wealth, and giving back.

“My values align with what is being said here because I am a person of faith, so I see that is true in my own community. The love of money or the desire to obtain wealth above anything else has a great danger to how you treat others. It skews your perspective, your priorities. **When I read something like this... it reaffirms my belief that money is not the end-all, be-all.** At the end of the day it doesn't say who we are as people. **Money itself is not a measure of our worthiness.**”

– *Hispanic woman, Republican, Very Conservative, 52yo, from California*

“I believe that we are all a part of one body and we’re supposed to be working together to help build the kingdom of God... **I don't believe anybody should be poor. No one should be hungry. People should not be without a place to live.**”

– *Black woman, Independent, Moderate, 55yo, from California*

What Works: Messaging Example #4

MESSAGING EXAMPLE THAT WORKS: Social Media Post about Collective Action

When my neighbors and I heard rumors that our mobile home park might be sold, it felt like the rug was pulled out from under us. I've lived here for almost 20 years, and some of my neighbors have been here even longer. I'd seen lots of stories about people like us getting kicked out so developers could build expensive condos.

I work hard and like my job as a mechanic, but on my salary I'd never be able to buy a house in this area. Even most of the apartments are out of my price range. I'm proud to own my trailer and it's been a good home to me for all these years. I worried what would happen to my neighbors and me after the sale.

When we learned that a new law gave us 90 days to put together our own offer to purchase the park, we saw a glimmer of hope. We were excited, but we knew it would be a lot of work. We had lots of meetings and drank a lot of coffee to figure out if we could really do it. It wasn't easy, but I'm proud to say we did it. We worked with the county, the state, and a local bank to buy the park.

If you'd told me a year ago we could take on a bunch of big out of state corporations and win, I would have laughed. But this experience showed me what hard-working people can accomplish when we stand up for what's right, even when it seems hard.

WHY IT WORKS:

For many audience members, this message modeled what change can look like, and made them feel agency and hope. They shared that seeing a concrete example of economic cooperation in support of a common goal **made them feel hopeful that everyday people can make broader change and improve their circumstances.** They also liked that the messenger and his community used their agency in the face of corporate profiteering.

Note that some aspects of this message did not resonate universally. Some questioned the messenger's story and thought he should have expected to move eventually, since he didn't own the land he was living on, or communicated underlying judgments about him having lived in a trailer park for 20 years. This suggests that it is important to **select a messenger who audiences can relate to and identify with.**

What Works: Messaging Example #4

In their own words:

For many audience members, the social media post helped them feel more hopeful, and affirmed their agency through a specific example of collective action.

“What [this messenger] said, about what hard-working people can accomplish when we stand up for what is right, even when it seems hard – **I agree with him.**”

– *East Asian woman, Democrat, Moderate, 37yo, from California*

“Even though I feel big business runs policy and everything, there are instances where **smaller people come together as a group, and essentially take down or put pressure on companies and politicians to do the right thing, and make life better for themselves.**”

– *Black man, Democrat, Moderate, 35yo, from Georgia*

What Doesn't Work: Detailed Recommendations

WHAT <u>DOESN'T</u> WORK	WHAT IT MEANS
<p>1. Framing progressive tax policies as a punitive measure on the wealthy.</p> <p>2. Using language or a tone that reads as partisan or skewed, and/or as categorical villainization of the wealthy for having wealth.</p>	<ul style="list-style-type: none"> ➤ This audience's deeply-held value of 'treating people fairly' extends to billionaires and the wealthy as well. They have strong negative reactions to messaging that categorically villainizes wealthy people based solely on the fact that they are wealthy. ➤ They also react negatively to messages which imply that we should raise tax rates on the wealthy as a punishment for having wealth. ➤ Many audience members also believe that they can someday achieve a measure of wealth themselves. This is not just an aspiration, but a belief that is deeply important to their personal feeling of having agency to be able to make a good life for themselves and loved ones. This belief impacts their views of tax policy, such as by eliciting hesitance around raising rates on investments, which they fear will impact themselves eventually (even if not right now), and exacerbating their negative reactions to messages that imply taxes are a punishment for seeking wealth.

What Doesn't Work: Detailed Recommendations

WHAT <u>DOESN'T</u> WORK	WHAT IT MEANS
<p>3. Emphasizing the unfairness of the wealth gap, and/or the power differential between those with money and those without money, as the central focus of your message or story.</p>	<ul style="list-style-type: none"> ➤ Although a few strategically curated facts about the tax system can be very effective at persuading this audience, messages whose central focus is the stark discrepancy in money/power between those who are wealthy vs. those who are not often have the opposite effect. ➤ This audience already has strong tendencies to be skeptical of government and politicians. Messaging that centers the extent of the wealth gap and power differential between the wealthy and less wealthy brings these beliefs further to the forefront, leading ideologically moderate audience members (including Democrats) to further feel that they are powerless, 'trapped in a broken system,' and that change is hopeless.

What Doesn't Work: Detailed Recommendations

WHAT <u>DOESN'T</u> WORK	WHAT IT MEANS
<p>4. Emphasizing what a progressive tax policy could pay for as the central focus of your message or story.</p>	<ul style="list-style-type: none"> ➤ Because this audience tends to be skeptical of government efficacy, they often do not resonate with messages centrally focused on the possibility of what higher taxes could pay for – better schools, health care, etc. These messages tend to trigger and bring to the forefront their belief that the government won't spend the money efficiently or effectively, and that communities therefore won't actually see direct benefits. ➤ On the other hand, stories of collective action as proof points that change is possible can be powerful for breaking through some of these negative emotions. ➤ In addition, audience members did react positively to references about public programs when they were framed not as benefits on their own, but through the lens of what they can do for working people (<i>for example: 'the economy grows when working people have what they need to thrive – affordable health care, child care, and housing'</i>).

What Doesn't Work: Messaging Example #1

MESSAGING EXAMPLE THAT DOESN'T WORK

Opinion Statements on Extreme Wealth & Taxes

"Billionaires and big corporations are avoiding taxes while making record profits. Meanwhile, these same billionaires and big corporations are charging hard-working Americans more at the pump and the grocery aisle. We need to close loopholes in our tax system that reward bad behavior, and better enforce the expectation that everyone contribute what they owe."

- *Camila Lorton, Florida*

"Billionaires are innovators and job creators. We all have a lot to learn from them. Taking away billionaires' freedom to earn and keep as much money as possible means taking that freedom away from everyone. Taxing the rich would also hurt us all because of how the rich contribute to our economy and spur innovation."

- *John T. Ross, Oregon*

"If billionaires were taxed at even close to the same rates as the rest of us, imagine what we could pay for. We could get more teachers in schools. We could make sure children have access to good health care. We could repair roads and bridges, and improve parks and public spaces. Working people create the wealth of this country and we should benefit from it too."

- *Amanda Umfleet, Nebraska*

WHY IT DOESN'T WORK:

When presented with these three opinion statements together, most audience members felt that there were some valid points in each statement. However, because each statement individually read as skewed toward pro-billionaire or anti-billionaire sentiment, **audience members expressed wariness of bias and misinformation.** Overall, this message did not move them positively.

Audience members had **negative reactions to sweeping statements without nuance.** This, combined with their aspirational views toward the wealthy, led them to **reject messages that sound accusatory toward the wealthy or generalize billionaires as 'bad.'**

For some audience members, despite expressing a desire for the system to change, these statements left them feeling unclear on actionable steps they could take. Without being offered an accessible path forward, **audience members had cynical or pessimistic overall reactions,** suggesting that the problems described in these statements reinforced their mindsets of being trapped in a broken system.

What Doesn't Work: Messaging Example #1

In their own words:

Many audience members felt skeptical and/or more pessimistic after seeing the three opinion statements on extreme wealth and taxes.

"I think they all make valid points, but **they are just very skewed each way depending on what they want people to think.**"

— *East Asian woman, Democrat, Moderate, 45yo, from Maryland*

"[The current system of tax loopholes] just kind of makes me feel **sick to my stomach and repulsed and so frustrated and this is not fair.** How can we change this? **But it is really hard to change [a whole system] like that.**"

— *White man, Independent, Somewhat Conservative, 25yo, from Georgia*

What Doesn't Work: Messaging Example #2

MESSAGING EXAMPLE THAT DOESN'T WORK

'Momfluencer' Social Media Post about Tax Proposal

I recently heard about a proposal in my state to increase the tax rates for those making more than \$2 million per year. At first I thought this would be a bad idea for everyone. I'd always heard that lower taxes at the top means there's more money to trickle down through our economy.

As I read more about the proposal, I learned that it would bring relief to 97% of taxpayers by making education, health care, and housing more affordable. And because those basic necessities would be more affordable, people would have more money in their pockets right away to spend how they choose. It made me think about my son, who's a paramedic.

Even though he works hard and manages his money wisely, his salary hasn't kept up with the rising cost of living in our state. Because of that, he's had to put his dreams of buying a house and starting a family of his own on hold. I realized that this proposal would provide him with opportunities to bring his dreams within reach.

WHY IT DOESN'T WORK:

While messaging about relatable economic challenges – like housing affordability – resonated with some audience members, they also **rejected the logic that higher taxes on billionaires will lead to greater collective economic well-being** through increased funding for public programs and infrastructure.

They expressed skepticism about government efficacy, and therefore **disbelief that raising taxes would result in the direct community benefits described here.**

Many also **disagreed with the implication that the wealthy should be 'punished' with higher taxes** in order to fund the collective good.

What Doesn't Work: Messaging Example #2

In their own words:

Many audience members expressed skepticism about whether the tax proposal discussed in the social media post from a 'momfluencer' would actually lead to the tangible community benefits she described.

"I can feel the higher cost of living and the burden that is created on everyone I know. That is true. **[But] when I read about proposals that involve a tax increase that say they are going to benefit such and such group, I just don't know that that is true.** It is our general lack of knowledge of how money is actually being spent, **whether our tax dollars are actually going to be used as they were originally intended or promised.** It is all sort of a big mystery."

— *Hispanic woman, Republican, Very Conservative, 52yo, from California*

"I like the idea of [billionaires] paying their fair share of taxes. I think it is the right thing to do, **but if them paying this tax goes to the government and we don't talk about where it comes out or where we see the funding, I don't necessarily think it changes anything.**"

— *Black woman, Democrat, Somewhat Liberal, 40yo, from Georgia*

Suggested Responses to Narratives that Inhibit Progress



Suggested Responses to Narratives that Inhibit Progress

When working to persuade audiences, you may often encounter narratives that are a challenge to forward progress – sometimes in the form of opposition messaging efforts, or sometimes in the form of deeply-embedded cultural narratives and mindsets that shape our audiences' opinions in the opposite direction of our goals.

We invite you to use the evidence-based suggestions on the following pages as general guidance and a starting point for considering what you might say in response to these narratives – **not as a rote script.**

In particular, we recommend that you personalize these responses in your own way, including **naming your wholesome motivations for speaking out** (personal values, lived experiences, identities, etc.) whenever possible.

If in doubt about how to respond, always seek to:

- 1) Bring the focus back to **working people and families**, and how they are the drivers of the American economy.
- 2) Cite the value of fairness, including how **the tax system should be fair to everyone, especially working people and families**. Use a strategically neutral tone and facts – **without strong judgment or categorical villainization of the wealthy** – to make the case for needing to simplify the tax system, ensure it is fair, and close loopholes. For example:
 - *Historically, tax rates were very high for the richest individuals, and it wasn't until the last 40-50 years that this changed and we prioritized trickle-down economics.*
 - *Today, tax rates for billionaires are lower than for working people.*

Suggested Responses to Narratives that Inhibit Progress

NARRATIVE THAT INHIBITS PROGRESS

Raising taxes on anyone – including the rich – will have negative effects on the economy, like eliminating jobs and leading to higher prices.

-and/or-

The economy grows when people – including wealthy people, who own businesses and create jobs – are incentivized to work hard by keeping what they earn.

EXAMPLE RESPONSE

- American economic growth and prosperity **relies on working people and families having what they need to contribute and innovate** – such as ample job opportunities that pay a living wage, and affordable health care, child care, and housing.
- ‘Trickle-down’ economics, or the idea that lowering taxes on the wealthy is the key to economic prosperity, **ignores the fact that it’s actually working people who power our economy**. And yet, **our tax system currently only works for the wealthy**: because tax rates are lower on returns from accumulated wealth than on money earned from work, wealthy people contribute much less in taxes than working families. For example, someone earning \$45,000 a year pays a tax rate of 14.9%, while the wealthiest 25 people in America pay an average true tax rate of 3.4%.
- We have an **opportunity to create a tax code that works for everyone, especially working people and families**, by updating and simplifying the tax code, and closing loopholes, so everyone contributes their fair share.

Suggested Responses to Narratives that Inhibit Progress

NARRATIVE THAT INHIBITS PROGRESS

Billionaires are innovators and job creators, and many of them already give back by giving to charity and other causes. We are all better off because of them.

-and/or-

The wealthy earned their money by working hard and seizing opportunities that came their way. Since they worked hard for their money, they should get to keep it and make their own choices about how to spend it.

EXAMPLE RESPONSE

- It's important to recognize every person's efforts and innovations, no matter the circumstances they are born into. It's also true that **working people and families are the true drivers of the economy – not any single wealthy individual.**
- **When workers and families have more in their pockets to spend, and what they need to live a good life like affordable health care and child care, our economy grows.** And yet, our tax system currently only works for the wealthy, with a higher tax burden on the middle class than for billionaires, and lower tax rates on returns from accumulated wealth than on money earned from work.
- We have an **opportunity to create a tax code that works better for everyone, especially working people and families,** by updating and simplifying the tax code, and closing loopholes, so everyone contributes their fair share.

Suggested Responses to Narratives that Inhibit Progress

NARRATIVE THAT INHIBITS PROGRESS

The fairest tax code is a flat rate for everyone.

EXAMPLE RESPONSE

- **Working people and families, who are the drivers of our economy, deserve a tax system that is fair and works for us.** But currently, our system only works for the wealthy; loopholes in our tax code allow some to pay excessively low rates compared to working families.
- For example, because tax rates are lower on returns from accumulated wealth than on money earned from work, wealthy people contribute much less in taxes than working families. For example, someone earning \$45,000 a year pays a tax rate of 14.9%, while the wealthiest 25 people in America currently pay an average true tax rate of 3.4%.
- **We need to close these loopholes, create a system where the very rich contribute in alignment with what they have gained from the economy, and ensure our tax system actually prioritizes working people and families** – who are the true drivers of economic growth, and who contribute to and help build the communities we all want to live in.

Suggested Responses to Narratives that Inhibit Progress

NARRATIVE THAT INHIBITS PROGRESS

Wealthy people will always stay wealthy; with their money, they control our politicians and political system.

Their money and power means that raising taxes on them will never happen.

EXAMPLE RESPONSE

- **The wealthy may have a lot of money, but no one gets wealthy alone.** The very rich depend on the working people who work for their companies and buy their products.
- In the last few years, and against challenging odds, **working people have successfully come together and formed unions to demand better from some of the most powerful corporations in the U.S.,** including Amazon, Apple, and Starbucks. *[Include other success stories from your state/local community if possible.]*
- Wins like these are hard-fought – but at the end of the day, the American economy doesn't work without us to power it. And that means we have the power to influence change for the better. **Working people are still the ones who vote politicians into office and keep them there – and that means working people can vote them out.** Let's hold them responsible for creating an economy that works for us.

Suggested Responses to Narratives that Inhibit Progress

NARRATIVE THAT INHIBITS PROGRESS

Raising taxes just gives the government more money to waste, without any direct benefits to people like me.

EXAMPLE RESPONSE*

- In America’s past, and under both Democratic and Republican governments, the wealthy paid up to 80–90% of their incomes on taxes. These rates became much lower during the 1960s–1980s, and **today, tax rates on the wealthiest Americans are lower than taxes on working people and families.**

- Economic growth and prosperity rely on working people and families having what they need to thrive and innovate; and **everyone should contribute to making that possible**, including the rich contributing their part fairly, in line with what they have gained from the economy. Ensuring the tax system works for working people, and is more fair across the board, **is a common sense measure that will help grow our economy – which in turn benefits all of us.**

**Note: This research project did not focus specifically on testing messages to address government inefficiency or ‘waste.’ The example response here reflects best practices gleaned from the narratives we did test and audience reactions we heard. Other practitioners and messaging research may have additional guidance to offer on responding to broader audience mindsets related to distrust in / cynicism about government systems.*

Putting These Recommendations to Work

The messaging recommendations in this guide have been audience-tested, but **they will only lead to change if they can be used by you**: the people and organizations communicating with persuadable audiences about the economy, billionaires and the wealthy, and tax policy.

We invite you to write down a short (3–4 sentence) ‘elevator pitch’ or core message that you and/or your organization might use. Imagine that you or your organization is speaking to audiences **who may currently be skeptical or have a different viewpoint, but could be persuaded** to be more supportive of progressive tax policy.

What pitch or core message would utilize the recommendations shared here, and also feel authentic to you and your organization?

CHECK: Does your core message...

- Focus on working people and families as the drivers of the American economy?
- Use a strategically neutral tone with curated details and facts that can allow the audience to reach their own conclusions?
- Emphasize widely-accepted ideas like simplifying the tax system and eliminating loopholes?
- Name you / your messengers’ wholesome motivations for speaking out, and signal reasons for credibility?
- Name and normalize audience members’ potential discomfort around finance, and help them realize their own agency?
- AVOID describing higher taxes as a punitive measure on the wealthy?
- AVOID a partisan tone and categorical villainization of the wealthy?
- AVOID a central focus on the stark extent of the wealth gap or power differential between those with and without money?
- AVOID a central focus on what progressive tax policies could pay for?

Revise and refine as needed!

Remember that as you start to use these recommendations with your audiences, you may find additional nuances or entirely new learnings about what does and doesn’t work – which you can use to help further refine your communications and messaging.

APPENDICES



Appendix A: Full Tested Messaging Materials

Throughout this guide, we included annotated excerpts from messaging materials we tested that either performed particularly well or particularly poorly with this persuadable audience.

Links to the full versions of all audience-tested materials are included here.

All statistics and other fact-based statements in these materials were taken from real sources. Otherwise, these messaging materials are fictionalized mockups of the type of content – both supportive and opposition – that our audience is likely to encounter in the real world.

Tested Materials Excerpted in this Guide

- [FAQ on history of taxes + 'both sides' of the debate to raise taxes on the wealthy](#)
- [LTE from a financial literacy teacher](#)
- [LTE from a faith leader](#)
- [Social post about collective action](#)
- [Opinion statements on extreme wealth & taxes](#)
- [Social post about tax proposal from a 'momfluencer'](#)

Additional Tested Materials

- [Social post from a high school teacher](#)
- [Blog post from a CEO](#)
- [Money management blog](#) – *included in message testing as opposition content*

Appendix B: Detailed Research Methodology

Three phases of research contributed to the recommendations in this guide.

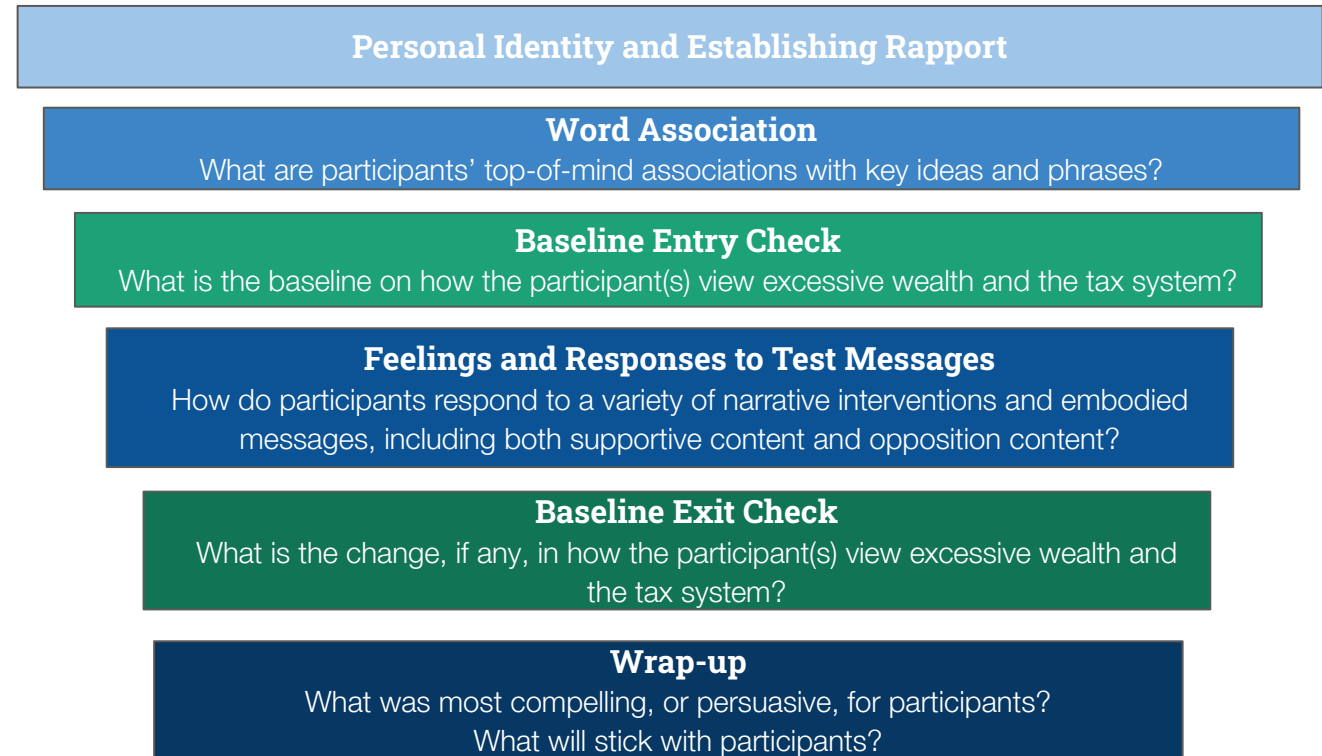
The Landscape phase aimed to understand and map the existing narrative landscape in America around issues related to wealth, billionaires, the economy, and tax policy. This phase included:

- An in-depth narrative analysis of news articles, opinion pieces, and editorials published in the last 2 years by mainstream (national), business and finance, and political outlets – identified through a search of keywords related to excessive wealth, tax policy, and the economy;
- A review of the top posts for relevant keywords (“ultra rich” / “ultra-rich”, “excessive wealth” / “excessively wealthy”, “wealth gap”) on TikTok, Instagram, and X;
- A review of EWDI’s [Funding Our Freedoms](#) synthesis report of existing tax policy public opinion research.

The Audience Mindset phase consisted of 10 in-depth qualitative interviews with audience members to better understand Americans’ existing emotions, values, beliefs, identities, and lived experiences relating to wealth, billionaires, the economy, and tax policy.

The Message Testing phase included in-depth qualitative interviews with 10 audience members (not previously interviewed), and two focus groups with 15 total participants (one with Black women and another with white men), to assess participants’ thoughts, feelings, and other reactions in response to test messages.

During the Message Testing phase, we conducted interviews and focus group discussions using the following flow to: understand audiences’ personal identities/experiences and top-of-mind thoughts on relevant topics; present test messaging; and assess mindsets and policy support pre- and post-messaging.



Acknowledgements & Research Team

Excessive Wealth Disorder Institute (EWDi) and our Advisors

EWDi researches, educates, and organizes to build a broad-based movement that dismantles the social, economic, and environmental dangers posed by excessive wealth. Hibba Meraay (Research Lead) and Gabriela Sandoval (Executive Director) worked in a project steering role to help guide the research and recommendations presented in this guide. We are deeply grateful to our committee of research advisors, from the EWDi team and external partners, whose expertise and perspective were invaluable for this project: Anika Fassia (We Make the Future), Abigail Stahl (Groundwork Collaborative), Brittany Williams (EWDi), four waters (four waters media), and Jenn Steinfeld (EWDi).

Wonder: Strategies for Good

Wonder is a team of experts in messaging, storytelling, psychology and public opinion research. We use audience insights to develop storytelling and messaging strategies that shape attitudes and influence the behavior of key target audiences on some of the most pressing and emotionally complex issues of the day. Our research, analysis, and strategy team for the work presented in this guide included Camille Trummer, Caroline Glynn Neal, Elysha Davila, Ian Grady, Julia Liao, Robert Perez, and Suzie Flores.



For questions about this guide or other inquiries:

Hibba Meraay (EWDi Research Lead)

hmeraay@excessivewealth.org

Note: All images used in this guide are copyright-free, sourced from Pexels.