

THE EFFECT OF BRANDING ON THE SUCCESS OR FAILURE  
OF NONVIOLENT MASS MOVEMENTS

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General Studies

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The opinions and conclusions expressed herein are those of the student author and do not necessarily represent the views of the U.S. Army Command and General Staff College or any other governmental agency. (References to this study should include the foregoing statement.)

## ABSTRACT

THE EFFECT OF BRANDING ON THE SUCCESS OR FAILURE OF NONVIOLENT MASS MOVEMENTS, by MAJ Dewey M. Miller, 116 pages.

The thesis critically analyzes the relationship between a nonviolent mass movement's ability to create and manage a favorable image and the movement's success or failure. Movements create and manage their brand image through the process of presenting a positive image of the organization and its message to key target audiences and the management of that brand image through discipline and coordination. The study begins by describing the evolution of the theory of nonviolent resistance, from pacifism for moral reasons to a doctrine based around information campaigns targeted at key audiences with the aim of achieving success by removing an opponent's support structures through nonviolent mass action. It then describes how commercial advertising theories can be used to describe how mass movements gain and maintain popularity. Two case studies of past nonviolent resistance movements are examined: the Montgomery Bus Boycott and the Occupy Wall Street movement. The history, branding efforts, results of the branding efforts, and the relationship between the branding efforts and the movements' success or failure are examined in both case studies. The research concludes that a connection can be seen between the success of the Montgomery Bus Boycott and its successful branding and the failure of the Occupy Wall Street movement and the failure of its branding. This research is also meant to make it clear that nonviolent mass movements are large scale informational campaigns, meant to influence the actions of large numbers of people. This study aims to assist future researchers and practitioners desiring to develop a system for the United States to use nonviolent mass movements to further policy objectives by demonstrating the importance of organizational branding and brand management. However, due to the limited scope of the research, the general link between the success or failure of nonviolent mass movements as a whole and the effectiveness of branding efforts cannot be established with any confidence.

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# CHAPTER 1

## INTRODUCTION

Recently, nonviolent mass movements have challenged governments around the world. These movements have ranged from revolutionary movements to movements meant to effect political change without toppling a government. Examples of these movements have been the Arab Spring<sup>1</sup> and color revolutions<sup>2</sup> that have overthrown governments in the Middle East and the Former Soviet Union, respectively. They also include such movements as the Tea Party<sup>3</sup> and the occupy movements,<sup>4</sup> which have attempted to effect political change in the United States and Europe.

Past examples of successful nonviolent mass movements are Mahatma Gandhi's campaign in India and his lesser known campaign in South Africa, the 2005 revolution that brought Viktor Yushchenko to power in Ukraine, and Dr. Martin Luther King Jr.'s bus boycott in Montgomery, Alabama. However, notwithstanding these high profile successes, some nonviolent mass movements have failed. Examples of failures include the anti-war movement in the United States prior to the 2003 Iraq invasion, the occupy

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<sup>1</sup> BBC, "Arab Uprisings," February 21, 2011, accessed September 24, 2014, <http://www.bbc.com/news/world-middle-east-12813859>.

<sup>2</sup> Ruairidh Arrow, "Gene Sharp," *BBC*, accessed September 24, 2014. <http://www.bbc.co.uk/news/world-middle-east-12522848>.

<sup>3</sup> David Barstow, "Tea Party Lights the Fuse for Rebellion on the Right," *New York Times*, February 16, 2010, accessed September 24, 2014, [http://www.nytimes.com/2010/02/16/us/politics/16teaparty.html?\\_r=0](http://www.nytimes.com/2010/02/16/us/politics/16teaparty.html?_r=0).

<sup>4</sup> Gloria Goodale, "Occupy Wall Street: Flash in the Pan or Beginning of a Movement?," *Christian Science Monitor*, October 4, 2011, accessed September 24, 2014, <http://www.csmonitor.com/USA/Politics/2011/1004/Occupy-Wall-Street-flash-in-the-pan-or-beginning-of-a-movement>.

Wall Street movement, and the Tea Party movement's attempt to prevent the passage of the affordable care act.

Nonviolent mass movements achieve their success by removing an opponent's support structures through nonviolent mass action. As mass movements rely on the actions of large groups of people, they have to attract large numbers of people to their struggle. Thus nonviolent mass movements can be seen as large-scale information campaigns, targeted at changing the perceptions and behavior of key audiences and focusing their efforts on using nonviolent methods to attack selected targets. In this sense, nonviolent mass movements would clearly fall under the "Information" component of national power. This study focuses on the processes that nonviolent mass movements use to "brand" their organizations so they are more appealing to target audiences and the effect that branding efforts have on the success or failure of movements.

#### Primary Research Question

How does branding and brand enforcement affect whether nonviolent mass movements succeed or fail?

#### Secondary Research Questions

How do nonviolent mass movements develop a brand for their organization?

How do nonviolent mass movements develop a brand for their message?

How do nonviolent mass movements enforce the brand reflected in their message and organization?

### Assumptions

The following assumptions are believed to be true and add relevance to the research project:

1. All mass movements are different. They have different goals, different participants, and take place in different circumstances. Therefore, what worked in one mass movement may not work in another mass movement.
2. While all movements are different, all successful nonviolent mass movements might share certain common traits that make them successful. Likewise, all unsuccessful nonviolent mass movements might share common traits that make them fail.

### Definitions

Active mass movement: For the purpose of this paper, an active mass movement is a movement that still has significant numbers of members conducting a campaign of nonviolent action.

Branding: Branding is the process of creating the unique image of a movement and its message in the mind of key target audiences. Branding aims to attract and retain both supporters and members to the organization and its message.

Leadership: Leadership is the group of individuals who are the leaders in the organization, regarded collectively.<sup>5</sup> Leadership provides the nonviolent mass movement with a decision-making body that enables planning, coordination, and control of the mass movement. Without effective leadership, a nonviolent mass movement cannot effectively

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<sup>5</sup> The Business Dictionary, "Leadership," accessed November 11, 2014. <http://www.businessdictionary.com>.

plan or execute its operations. It also cannot enforce branding by controlling messaging or the actions of its members.

Message branding: Message branding is the process by which a mass movement standardizes the messages it communicates to target audiences. If done correctly, the target audience will be more likely to take a positive view of the organization's message.

Message branding enforcement: Message branding enforcement is the process by which an organization controls the messages delivered by its spokespersons to ensure they are in line with the organization's message branding. It consists of policing spokespersons, coordinating talking points and public relations themes, and distancing the movement from other movements with different messages. It prevents confusion that hinders strategic messaging.

Nonviolent mass movement: A nonviolent mass movement is a large organized group that uses *primarily* nonviolent means to overthrow a government or produce a change in policy. Under this definition, violence may occasionally be used but will generally be defensive. However, the primary offensive methods used to attack the opposition are nonviolent. That said, there may be the perception that violence could occur if demands are not met.

Organizational branding: Organizational branding is the process by which a mass movement establishes the ideal of what the organization is and who its members are to target audiences. If done correctly, the target audience will be more apt to have a positive view of the movement and its members.

Organizational branding enforcement: Organizational branding enforcement is an organization's efforts to keep its members in line with the agreed-upon organizational

branding. It prevents the misbehavior of individual members from negatively affecting the public's view of the organization.<sup>6</sup> It primarily consists of enforcing the disciplined adherence to the organization's branding and discreetly expelling those who are incompatible with the branding.

Strategic planning: Strategic planning is a systematic process of envisioning a desired future and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them.<sup>7</sup> It focuses the organization's short term goals towards a larger desired end state.<sup>8</sup> Strategic planning prevents nonviolent mass movements from attempting to achieve poorly defined objectives and enacting poorly thought-out, short-sighted policies.<sup>9</sup>

Successful nonviolent campaign: For the purpose of this paper, a successful nonviolent campaign is a campaign by a nonviolent mass movement that achieved the goals it messaged to the public. For instance, if a nonviolent mass movement campaigned to change a government policy and the policy was changed while the movement was still active, the campaign will be viewed as successful. "Still active" means that the movement still has significant numbers of members conducting a campaign of nonviolent action.

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<sup>6</sup> Gene Sharp, *From Dictatorship to Democracy* (Boston, MA: The Albert Einstein Institution, 2002), 32.

<sup>7</sup> The Business Dictionary, "Strategic Planning," accessed November 11, 2014, <http://www.businessdictionary.com>.

<sup>8</sup> Sharp, *From Dictatorship to Democracy*, 52.

<sup>9</sup> *Ibid.*, 42.

Support structures: Support structures are what all governments (democratic or otherwise) use to maintain power.<sup>10</sup> They can include the support of the populace, security forces, and international allies.

Unsuccessful nonviolent campaign: For the purpose of this paper, an unsuccessful nonviolent campaign is a campaign by a nonviolent mass movement that failed to achieve the goals it messaged to the public. For instance, if a nonviolent mass movement campaigned to change a government policy and the policy was not changed while the movement was still active, the campaign would be viewed as unsuccessful. Unless the organization stated in its messaging that its purpose was to “raise awareness” of an issue, an organization cannot claim that it was successful without achieving its objectives.

### Limitations

Time and size constraints will limit the scope of this study. I will only cover two mass movements.

### Delimitations

This study will focus on branding differences between mass movements and the effect of branding on the success or failure of nonviolent campaigns. The overall theory of nonviolent mass movements has already been well documented and will be only briefly addressed. The methods of nonviolent resistance, leadership, organization of nonviolent organizations, logistics of nonviolent struggle, and strategic planning are all important to nonviolent movements but will only be addressed briefly. The methods for

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<sup>10</sup> Gene Sharp, *How Nonviolent Struggle Works* (Boston, MA: The Albert Einstein Institution, 2013), 7.

dealing with the aftermath of a successful nonviolent mass movement will not be discussed. It remains to be seen if in the future, nonviolent mass movements can be used to further the national policy objectives of the United States. Due to size and time constraints, the use of nonviolent mass movements to further national policy objectives, either by supporting a preexisting movement or starting one from scratch, will not be discussed.

### Conclusions

This study will examine how nonviolent mass movements brand their organizations and messages, how they enforce branding, and how this branding affects the success or failure of the movement. The literature review (Chapter 2) will first address the theory of nonviolent mass movements. It will then review literature regarding branding. Chapter 3 will discuss methodology for research. Chapters 4 and 5 will cover the Montgomery Bus Boycott and the Occupy Wall Street movement. They will examine the histories of these nonviolent mass movements, focusing on their branding and brand enforcement. They will also attempt to determine if branding was a factor in the success or failure of the nonviolent campaigns. Chapter 6 will discuss the findings and conclusions of the study and offer recommendations for further study.

## CHAPTER 2

### LITERATURE REVIEW

#### Development of Nonviolent Resistance Theory

The theory of nonviolent resistance has evolved over time. One of the original nonviolent resistance theories was Christian Pacifism. In the 20th century, the theory was further expanded upon by Mahatma Gandhi and Martin Luther King Jr., both of whom were at the center of successful nonviolent resistance movements. All felt that conflicts should be solved through nonviolent means for moral reasons. Following them, Gene Sharp further developed the theory of nonviolent resistance into what it is today by separating it from moral theory.

#### Morality: Tolstoy

The concept of Christian Pacifism is based around the idea that violence, even in response to evil, is immoral. It is best described by Leo Tolstoy in *The Kingdom of God is Within You* and uses the Sermon on the Mount as the basis of Christian virtue.<sup>11</sup> Tolstoy argued against the use of violence, arguing instead for universal love. He felt that all evil in the world should be fought with nonviolent resistance.<sup>12</sup> Interestingly, throughout the book he seemed unconcerned about whether or not the nonviolent resistance would lead to success on earth. He instead felt that the true rewards would be a

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<sup>11</sup> Leo Tolstoy, "The Kingdom of God is Within You," The Anarchist Library, accessed October 24, 2014, <http://theanarchistlibrary.org/library/leo-tolstoy-the-kingdom-of-god-is-within-you.pdf>, 20.

<sup>12</sup> *Ibid.*, 7.

justly lived life and justice would occur in heaven. In his opinion, true Christians were meant to lead lives of struggle and sacrifice while on earth.<sup>13</sup>

Morality Put To an Earthly Purpose:  
Mahatma Gandhi

Mahatma Gandhi also was opposed to violence for moral reasons. Influenced by Leo Tolstoy and his own Hindu beliefs, he developed *Satyagraha*, the theory for nonviolent action that he used in South Africa and India. Gandhi theorized that a struggle's ends and means were inseparable. If the ends of a struggle were a peaceful society, they could not be achieved through violent action.<sup>14</sup>

He also felt that success through nonviolent resistance could only be achieved by convincing the opponent to willingly change his actions. Anger or discourtesy against the opponent was strictly forbidden and he taught the principle of loving your enemy.<sup>15</sup> Like Tolstoy, Gandhi felt that nonviolent resistance was the moral response to evil and that through their personal suffering, protesters could convince their opponents to willingly change. All protests had to be aligned to enlighten and convert the opponent, not coerce. He also warned against protests meant to simply to harass and not enlighten the opponent.<sup>16</sup> Over the course of his struggle, Gandhi in practice moved away from his

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<sup>13</sup> Ibid., 112.

<sup>14</sup> Peter Ackerman and Jack Duval, *A Force More Powerful* (New York, NY: Palgrave, 2004), 65.

<sup>15</sup> Mahatma Gandhi, *The Collected Works of Mahatma Gandhi, Volume 48*, Gandhiserve Foundation, accessed October 25, 2014, <http://www.gandhiserve.org/cwmg/VOL048.PDF>, 340.

<sup>16</sup> Ibid., 441.

proscription against coercion and conducted actions that could jeopardize his opponents' positions if they did not yield.<sup>17</sup>

Morality and a Process for Victory:  
Dr. Martin Luther King Jr.

Martin Luther King, Jr. based his theory of nonviolent resistance on both Tolstoy's and Gandhi's theories. He laid out his theory in his *Six Principles of Nonviolence*. Within the context of those principles, Martin Luther King, Jr. stated that the goal of nonviolence was reconciliation, not the defeat of an opponent. The basic principle remained educating the oppressor through the personal suffering of protesters. As a corollary, protesters should, despite everything, love their oppressors.<sup>18</sup>

In addition to his theory on the nature of nonviolent resistance, Martin Luther King, Jr. developed a six-step process for nonviolent social change. The steps were: information gathering, education, personal commitment, discussion/negotiation, direct action, and reconciliation.<sup>19</sup> All these steps emphasized reconciliation with opponents and the need to love oppressors.

The main difference between Martin Luther King, Jr.'s theories and those of Tolstoy and Gandhi was the step-by-step method. Both Gandhi and King emphasized the need for reconciliation instead of coercion, but were willing to use coercion when necessary. All three also agreed that through the example of their suffering, nonviolent

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<sup>17</sup> Ackerman, *A Force More Powerful*, 66.

<sup>18</sup> Martin Luther King Jr, *Stride Towards Freedom* (Boston, MA: Beacon Press, 1958), 90-95.

<sup>19</sup> Martin Luther King Jr, "Six Steps of Nonviolent Social Change," The King Center, accessed October 25, 2014, <http://www.thekingcenter.org/king-philosophy#sub3>.

protesters could change their opponents' views. On moral grounds, all three also clung to the principle of "turn the other cheek" when nonviolent protest was met with violence. Finally, all followed the principle of "love your enemies" and emphasized the importance of not hating opponents, just hating their actions.

### Gene Sharp's Theory of Nonviolence Resistance Separation from Moral Theory

In 1973, Gene Sharp published *The Politics of Nonviolent Action*, which was followed by a series of other books including *There are Realistic Alternatives*, *From Dictatorship to Democracy*, and *How Nonviolent Struggle Works*. In these works he revolutionized the theory of nonviolence by separating it from moral theory.

While previous proponents of nonviolence recommended its use on moral grounds, Sharp recommended the approach because, in many situations, it had a better chance of success. While many of the tactics advocated by Sharp were taken from previous nonviolent resistance movements, his reasons for recommending their use were utilitarian. He felt that if freedom fighters took up a violent struggle, they were engaging in exactly the type of struggle in which their opponents had an advantage.<sup>20</sup> This made the choice of nonviolent means strictly utilitarian, not moral.

In all areas of nonviolent struggle Sharp retained a utilitarian view. He felt that when attacked, protesters should "turn the other cheek" because it made their opponents look bad. He referred to this process as "political jujitsu."<sup>21</sup> He did not share the concern for "loving your enemies" and felt that removing oppression was more important. He

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<sup>20</sup> Sharp, *From Dictatorship to Democracy*, 4.

<sup>21</sup> Sharp, *How Nonviolent Struggle Works*, 111.

advocated coercion and the outright overthrow of governments when education and reconciliation did not work.<sup>22</sup>

### The Mechanics of Nonviolent Action

In addition to separating moral theory from the theory of nonviolent resistance, Sharp developed theories of how governments maintained their power and how to separate a government from its power, as well as tactics nonviolent resistance movements could use. Sharp's theories on the power of government center around the willingness of the populace to obey, the techniques used to gain obedience, and the support structures that governments require to gain obedience. His theories on separating a government from its power center on the removal of key support structures needed for survival. His methods of nonviolent resistance are a list of actions that a nonviolent resistance movement can undertake to chip away at a government's support structures. Sharp and his protégés also studied specific requirements for success, including leadership, organization, and strategic thinking.

### Sharp's Theory of Governmental Power

Sharp theorized that all governments (democratic or otherwise) maintain power only through support structures.<sup>23</sup> Sharp defines these support structures as:

1. Authority- The belief that the government or system in place is legitimate and that everyone has a moral duty to follow orders or maintain the status quo.

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<sup>22</sup> Ibid., 121.

<sup>23</sup> Ibid., 7.

2. Human resources- The people who are willing to either cooperate, follow directives, or assist the government.
3. Skills and knowledge- Specialized skills and knowledge the government requires for survival. An example would be a highly skilled intelligence service capable of finding and silencing dissidents.
4. Intangible factors- The psychological or ideological reasons that induce people's obedience to their rulers.
5. Material resources- The resources governments control that are required to maintain their rule. Examples include money, communications infrastructure, and property.
6. Sanctions- The punishments that governments can administer to those who do not follow the government's directives. Examples include jailing dissidents or attacking protesters.<sup>24</sup>

All of these support structures rely on the support of the populace, security forces, or international allies. A supporting populace obeys the government's directives. Security forces coerce uncooperative members of the populace into obeying the government's directives. International allies can provide the necessary support (economic, military, etc.) that allows a government to continue to operate through coercion or bribery. When support structures are removed, governments will either collapse or change policies to regain their needed support structures.<sup>25</sup>

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<sup>24</sup> Sharp, *From Dictatorship to Democracy*, 18-19.

<sup>25</sup> Sharp, *How Nonviolent Struggle Works*, 113.

## Sharp's Theory of Nonviolent Change

Sharp felt that in order to effect change (revolutionary or otherwise), those in charge must be either convinced through reason or forced to change.<sup>26</sup> Nonviolent mass movements can force governments to change their policies or be brought down by creating rifts between governments and support structures. Once the support structures are separated from the government, they can no longer be called upon by the government to enforce its power.<sup>27</sup> These rifts can be created by promoting the message of the nonviolent mass movement and subverting the support for the government.

If the government's support structures do not respond to messaging, the nonviolent mass movement can conduct operations that provoke a reaction by the government. If the reaction by the government is seen as heavy handed or unjustified by members of the government's support structure, the government will isolate itself from its own support. Sharp refers to this as "political jiu-jitsu,"<sup>28</sup> whereby the strength of the government can be used against it. Should former members of the government's support structures defect to the side of the nonviolent movement, the government will either collapse or be coerced into changing policies to regain its support.<sup>29</sup>

In his book *How Nonviolent Struggle Works*, Sharp identifies four ways nonviolent mass movements can achieve their strategic ends: conversion,

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<sup>26</sup> Gene Sharp, *There are Realistic Alternatives* (Boston, MA: The Albert Einstein Institution, 2003), 2.

<sup>27</sup> Sharp, *How Nonviolent Struggle Works*, 15.

<sup>28</sup> *Ibid.*, 111.

<sup>29</sup> *Ibid.*, 121.

accommodation, nonviolent coercion, and disintegration.<sup>30</sup> With conversion, the government is convinced through reason that it should change its policies and actively embraces the goals of the nonviolent mass movement. Accommodation means that the government does not agree with the goals of the nonviolent mass movement, but is willing to give into the demands of the nonviolent mass movement. With nonviolent coercion the government is forced to give into the demands of the nonviolent mass movement due to its undermined support structure. With disintegration, the government completely collapses when it is separated from its support structure by nonviolent action.

#### Tactics of Nonviolent Mass Movements

Methods used by nonviolent mass movements are generally pacific, although some violence may be inevitable.<sup>31</sup> The nonviolent actions are separated from the violent ones as much as possible. One way to do this is to keep the tactics used to challenge the government exclusively nonviolent. However violence might be employed as a defensive measure by members of the movement when attacked.

One example of the latter approach in the American Civil Rights Movement was the announcement by the leader of the St Augustine Movement, Dr Robert B. Hayling that members of his movement were armed and would fight back against attackers.<sup>32</sup> On 24 October 1963, Klu Klux Klan members rode through an African American neighborhood shooting into homes. The residents responded, killing one of the

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<sup>30</sup> Ibid.

<sup>31</sup> Sharp, *From Dictatorship to Democracy*, 33.

<sup>32</sup> Augustine.com, "Black History," accessed September 27, 2014, [http://augustine.com/history/black\\_history/dr\\_robert\\_hayling/](http://augustine.com/history/black_history/dr_robert_hayling/).

Klansmen.<sup>33</sup> A more recent example of the use of violence as in Ukraine during the Euromaidan protests, where protesters occupied city centers and government facilities and fought back against police who tried to remove them.<sup>34</sup> From these examples, it can be discerned that what separates a violent mass movement from a nonviolent mass movement is that a violent movement uses violence offensively to achieve its ends. A nonviolent mass movement uses nonviolence offensively to achieve its ends. Violence associated with a nonviolent movement, if it occurs, is defensive.

In his book *From Dictatorship to Democracy*, Sharp lists and categorizes 198 tactics that can be used offensively in a nonviolent campaign.<sup>35</sup> The tactics include everything from protest marches (#38) to sex strikes (Lystistratic nonaction, #57) that can be targeted against a government or its support structures. Given the scope of this study, the tactics of nonviolent mass movements will not be discussed further.

#### Leadership and Strategy of Nonviolent Mass Movements

Robert L. Helvey, a former Army colonel and defense attaché in Rangoon, was introduced to Sharp's ideas when he attended a lecture at Harvard.<sup>36</sup> He recognized that Sharp's theories offered an alternative to military action for achieving national objectives.

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<sup>33</sup> Shirley Bryce et al., *Timeline of Events: 1960's Civil Rights Movement of St Augustine, Florida*, accessed September 27, 2014, <http://www.crmvet.org/info/staugtim.pdf>.

<sup>34</sup> BBC, "Why is Ukraine in Turmoil?" February 22, 2014, accessed September 24, 2014, <http://www.bbc.com/news/world-europe-25182823>

<sup>35</sup> Sharp, *From Dictatorship to Democracy*, 79.

<sup>36</sup> A Force More Powerful, "Interview: Col. Robert Helvey," accessed June 3, 2015, <http://www.aforcemorepowerful.org/films/bdd/story/otpor/robert-helvey.php>.

Helvey took Sharp's ideas a step further by developing techniques for leadership, analysis, and strategic planning for nonviolent mass movements. He did this by borrowing techniques from the military and adapting them for nonviolent mass movements. In his book *On Strategic Nonviolent Conflict: Thinking about the Fundamentals*, he recommends that nonviolent mass movements use, for example, a modified operations order (OPORDER),<sup>37</sup> a strategic estimate,<sup>38</sup> and control measures.<sup>39</sup>

### Strategic Communication

Due to the methods used to target the government's support structures, at heart a nonviolent mass movement is a large scale informational campaign. As such, the entire strategy is based around the influencing of target audiences, which can include potential recruits to the movement, potential supporters of the movement (both domestic and foreign), and the government's support structures.

Gene Sharp stated that the goal of the initial communications plan is to develop cause consciousness amongst the target audience.<sup>40</sup> He warned about the importance of quality communications and the need to limit antagonizing potential allies. Poor quality communications could turn off or alienate the target audience. He also cautioned against antagonizing potential allies because as a movement grows, it must gain acceptance and support from other groups who may not have been in the original target audience.

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<sup>37</sup> Robert L. Helvey, *On Strategic Nonviolent Conflict* (Boston, MA: Albert Einstein Institute, 2004), 70.

<sup>38</sup> *Ibid.*, 51.

<sup>39</sup> *Ibid.*, 72.

<sup>40</sup> Sharp, *How Nonviolent Struggle Works*, 60.

Sharp envisioned the information campaign being conducted in six phases. The first phase, develop understanding of the issues, involves educating the target audience about the problems that will be addressed by the movement. The second phase, inform the populace of the contemplated action, centers around telling the target audience how the problems will be addressed and warns of the importance of not to engage in acts that would damage the movement's reputation. In the third phase, justify the resort to direct action, the movement convinces the audience that the proposed actions are necessary. The movement informs the audience of the problems they will face as the result of the struggle during the fourth phase, warn of the hardship and suffering. The fifth phase, arouse confidence that those penalties will be worth incurring, is characterized by establishing support for the movement despite the acknowledged hardships it will bring. Finally, in the sixth phase, believe that in the long run the combination of a just cause, the use of this technique, a wise strategy, and skilled disciplined behavior will ensure victory, the movement seeks to strengthen resolve while the struggle is in progress.

Robert Helvey, likely due to his military background, described a nonviolent mass movement's communications in the context of psychological operations. In his book, *On Strategic Nonviolent Conflict*, Helvey used the 1987 NATO definition for psychological operations, which was current at the time:

Planned psychological activities in peace and war directed to enemy, friendly, and neutral audiences in order to influence attitudes and behavior affecting the achievement of political and military objectives. They include strategic psychological activities, consolidation psychological operations, and battlefield psychological operations.<sup>41</sup>

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<sup>41</sup> Helvey, *On Strategic Nonviolent Conflict*, 77.

Helvey described the planning factors to consider for communication, which he referred to as propaganda, “into the target,” the message, the messenger, and feedback.<sup>42</sup> The target audience should be broken down into components and each provided a specifically tailored message. The messages must themselves be designed to change a belief or behavior in a manner that will support the movement. The messenger refers to the technique used to transmit the message. Feedback is the process of evaluating the effect of the propaganda on the target. Based on feedback, it is possible to adjust the message or messenger to achieve greater success.

Both Sharp and Helvey describe communications techniques in depth. In Sharp’s 198 methods of nonviolent protest and persuasion, he outlined communications techniques under the headings “formal statements communications with a wider audience,” “group representations,” “symbolic public acts,” “drama and music,” and “public assemblies.”<sup>43</sup> Helvey broke the communications techniques down into symbols, slogans, music, print media, audio-visual, and rumor.<sup>44</sup> Given the delimitations of this paper, communications methods will not be discussed further.

#### Nonviolent Theorists on Branding of Mass Movements

Neither Sharp nor Helvey specifically mention branding. However, they both indirectly discuss the importance of organizational and message branding and the dangers when it is done incorrectly. They also both indirectly discuss methods to enforce branding.

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<sup>42</sup> Ibid., 79.

<sup>43</sup> Sharp, *There are Realistic Alternatives*, 39.

<sup>44</sup> Helvey, *On Strategic Nonviolent Conflict*, 82.

Sharp discussed organizational branding mainly by harping on the importance of discipline. He warned that brutalities inflicted on protesters by security forces may be an attempt to elicit a violent reaction that would discredit them.<sup>45</sup> He also discussed how maintenance of nonviolent discipline was vital for political jiu-jitsu.<sup>46</sup> By maintaining nonviolent discipline despite being violently attacked, an organization can gain legitimacy at the expense of their opponents. In both of these statements, Sharp indirectly is discussing the importance of nonviolent mass movements maintaining their nonviolent branding. Any outbreak of violence on the mass movement's part might change their brand for the worse

Sharp also indirectly discussed the importance of message branding. He described how all messaging should be focused to hit a regime's support structures with the intention of turning them neutral or to supporters of the mass movement.<sup>47</sup> This disciplined approach could keep an organization from wasting resources on small side issues that would have no strategic impact.

He also described how the initial actions of a movement should be used to prepare the populace for further action and test their mood.<sup>48</sup> This is important because with these initial actions, an organization messages the public and establishes its brand. Sharp also

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<sup>45</sup> Sharp, *From Dictatorship to Democracy*, 54.

<sup>46</sup> *Ibid.*, 32.

<sup>47</sup> *Ibid.*, 62.

<sup>48</sup> *Ibid.*, 60.

stated that messages directly communicated by the mass movement must always be factual, as exaggerations or unfounded claims will undermine credibility.<sup>49</sup>

Helvey devoted an entire chapter of his book *On Nonviolent Conflict* to what he referred to as contaminants.<sup>50</sup> He defined contaminants as small elements that can render movements ineffective or destroy them. Violence on the part of organizations members, even if in response to violence from security forces, could alter its branding as a nonviolent organization. This could remove the legitimacy that it gained in the eyes of target audiences. The perception of exclusiveness could also be harmful as it not only limits participation, but an elitist branding could alienate the organization from key demographic groups. The presence of foreigners in an organization, even in small numbers, also affects branding. The organization could be rebranded to key demographics as a foreign attempt to meddle in the internal affairs of a country.

In the chapter on contaminants, Helvey also described the dangers of agents provocateurs.<sup>51</sup> He warned that governments often send agents to infiltrate opposition groups not just to provide intelligence, but to provoke or carry out acts discredit the organization. Even if an agent provocateur alone carries out an act, it will negatively affect the branding of the organization. For organizational branding enforcement, he recommended staying alert for changing patterns of discussions. Helvey also discussed the danger posed by younger members in a nonviolent mass movement.<sup>52</sup> If provoked

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<sup>49</sup> Ibid., 54.

<sup>50</sup> Helvey, *On Strategic Nonviolent Conflict*, 117-120.

<sup>51</sup> Ibid., 123.

<sup>52</sup> Ibid., 15.

they could easily resort to violence. This violence could damage the branding of the movement. He recommended conducting nonviolence training, requiring members of the movement to sign a code of conduct, and ensuring that strong leadership was in place.

For message branding, Helvey warned against the appearance of disunity.<sup>53</sup> If an organization sent out conflicting messages, the appearance of internal conflict would negatively affect the branding. He recommended keeping the objectives of the organization at a bare minimum. This would prevent confusion and keep the organization focused on a set of carefully selected goals.

#### Business Branding Theory as it Relates to Mass Movements

As part of its information campaign, a nonviolent mass movement must appeal to its target audiences. It must get target audiences to support both the organization and its message. Businesses have similar requirements. They must convince customers (target audiences) that both their company (movement) and its products (messages) are superior and worth buying (supporting). In the business world this is called branding.

In business, branding is the process by which a business defines both its organization and its products to a target audience. The Business Dictionary defines branding as:

The process involved in creating a unique name and image for a product in the consumers' mind, mainly through advertising campaigns with a consistent theme. Branding aims to establish a significant and differentiated presence in the market that attracts and retains loyal customer.<sup>54</sup>

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<sup>53</sup> Ibid., 118.

<sup>54</sup> The Business Dictionary, "Branding," accessed November 11, 2014, <http://www.businessdictionary.com>.

A mass movement could use the same definition for its efforts. However, instead of a consumable product or service, they are trying to establish and brand loyalty to their movement and its message.

Brand management is the process by which a business continuously monitors target audiences' views and adjusts its messages and products to maintain its appeal. The Business Dictionary defines Brand Management as:

The process of maintaining, improving, and upholding a brand so that the name is associated with positive results. Brand management involves a number of important aspects such as cost, customer satisfaction, in-store presentation, and competition. Brand management is built on a marketing foundation, but focuses directly on the brand and how that brand can remain favorable to customers. Proper brand management can result in higher sales of not only one product, but on other products associated with that brand. For example, if a customer loves Pillsbury biscuits and trusts the brand, he or she is more likely to try other products offered by the company such as chocolate chip cookies.<sup>55</sup>

For a nonviolent mass movement, principles of brand management can be used to maintain the favorable image of the organization and its message. Once the populace has formed a positive view of an organization and its message, small slip-ups on the part of the movement's members could create problems. Through the process of brand management, a movement could work to prevent those slip-ups or conduct an effective response that would prevent further damage to the brand. For the purpose of this paper, this process is defined as consisting of organizational branding enforcement and message branding enforcement.

Businesses also attempt to develop "brand personality" which further draws customers. Brand personality is defined as:

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<sup>55</sup> The Business Dictionary, "Brand Management," accessed November 11, 2014, <http://www.businessdictionary.com>.

Human traits or characteristics associated with a specific brand name. Common characteristics or traits represented include uniqueness, sincerity, intellectualism, competence, excitement and sophistication. The brand personality gives consumers something with which they can relate, effectively increasing brand awareness and popularity.<sup>56</sup>

This idea can be used to explain the how the image of an organization and its message works among target audiences. A movement could improve its perception among a target audience by create the image that its members are respectable or have a lot in common with the target audience. It could also increase participation in the movement by promoting participation in its acts of nonviolent resistance as fun or personally liberating.

Branding's supremacy in perception was demonstrated in a 2003 study of subjects who were evaluated by magnetic resonance imaging (MRI) while being given a test similar to the "Pepsi Challenge." The Pepsi Challenge asks people to choose which product, Coke or Pepsi, tastes better in a blind taste test. The challenge usually concludes that most Americans prefer the taste of Pepsi,<sup>57</sup> but this is contrasted with the higher sales of Coke, which outsells Pepsi by nearly two to one.<sup>58</sup> In the study, subjects were given a blind taste test of Pepsi and Coke, and then were given Pepsi and Coke in marked

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<sup>56</sup> The Business Dictionary, "Brand Personality," accessed November 11, 2014, <http://www.businessdictionary.com>.

<sup>57</sup> Will Wei, "We Recreated the Pepsi Challenge To See What People Really Like," *Business Insider*, May 3, 2013, accessed May 25, 2015, <http://www.businessinsider.com/pepsi-challenge-business-insider-2013-5>.

<sup>58</sup> Associated Press, "Diet Coke Surpasses Pepsi to Become No. 2 Soda in U.S.," *The Associated Press*, March 18, 2011, accessed May 25, 2015, <http://usatoday30.usatoday.com/money/industries/food/2011-03-17-diet-coke-2.htm>.

containers.<sup>59</sup> The study found that in the blind test, the subjects showed greater activity in their ventral putamen, a part of the brain most active when experiencing pleasure, while drinking Pepsi. However, when the subjects were given Pepsi and Coke in the marked containers, they showed more activity in their ventral putamen when drinking Coke. The researchers concluded that while Pepsi likely did taste better, most of the subjects felt that Coke tasted better because of superior branding. The test subjects likely perceived Coke as having a better brand personality and this translated into their actual feelings of pleasure. With this in mind, it would make sense that the perception of the target audiences might have been more influenced by the branding of the movements than other factors.

#### Advertising Theory and Nonviolent Mass Movements

Commercial advertising uses messaging directed towards target audiences. The goal of the messaging is to influence human behavior in order to get the target audiences to buy their products or services or to simply influence their perception and build loyalty to a certain brand.

Nonviolent mass movements must accomplish similar tasks. They must make their organizations respectable to target audiences (branding). They must also standardize their message to convince target audiences of the validity of their goals (message branding). Lessons from the advertising industry can be used by mass movements. The relevant advertising theories and examples include the hierarchy of effects model,

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<sup>59</sup> Lone, Frank, "How the Brain Reveals Why We Buy," *Scientific American*, November 2, 2009, accessed May 25, 2015, <http://www.scientificamerican.com/article/neuromarketing-brain/>.

credibility theory, and commercial public relations techniques, as best exemplified during the 1982 Tylenol murders.

### Hierarchy of Effects Model

The hierarchy of effects model is used to describe how consumers respond to advertising.<sup>60</sup> It is called a hierarchy model because it starts with a large target audience that forms the pool of potential customers. According to the model, consumers go through six steps to make a purchase. The further along consumers move, the closer they get to making a purchase. At any point, members of the target audience can lose interest and drop out. These people will not go on to make the purchase. The steps can be broken into three stages based on what the consumers are thinking or doing. The model is as follows:

- |               |   |                              |
|---------------|---|------------------------------|
| 1. Awareness  | } | Cognitive Stage              |
| 2. Knowledge  |   |                              |
| 3. Liking     | } | Affective Stage              |
| 4. Preference |   |                              |
| 5. Conviction | } | Conative or Behavioral Stage |
| 6. Purchase   |   |                              |

This model can be used to better understand the effects of organizational and message branding, as well as to guide messaging. In the Cognitive Stage, the mass movement communicates to target audiences to achieve basic awareness and then education. In this stage the target audience first sees the mass movement's messaging. In

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<sup>60</sup> CBU Marketing, "Hierarchy of Effects Model," accessed November 1, 2014, <https://cbumarketing.wikispaces.com/Hierarchy+of+Effects+Model>.

the Affection Stage, the target audience forms an opinion of the mass movement's brand, then transitions to preferring the movement's brand to the opponent's brand. In the Conative Stage, the target audience adjusts its behavior to support the movement.

This could be used to guide messaging by assuming that the further along in the process each specific target audience is, the more likely they would become active supporters of the movement (Purchase). If there are two target audiences, A and B, and target audience A is mostly at the Conviction step while B is mostly at the Knowledge step, it would make sense to put more resources into messaging target audience A as they are closer to the end goal of active support to the movement. In addition to requiring more time and resources to get to the Purchase step, a percentage of the target audience could be expected to drop out before getting to that stage.

### Credibility Theory

In order for a mass movement to be successful, it must be credible to its target audience. Organizational branding results in target audiences viewing the mass movement favorably. Message branding makes target audiences positively view the organization's messages. The advertising industry has several theories of what affects target audiences' view of credibility.

Advertisers have found that the perceived credibility of an advertiser increases if they are likable.<sup>61</sup> Theoretically, the reason is that a likable person makes the target audience feel good and these positive feelings are then transferred to the message, product, or idea they are promoting. A likable advertiser also conveys that they have the

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<sup>61</sup> Richard M. Perloff, *The Dynamics of Persuasion* (New York, NY: Routledge, 2014), 250.

interests of the target audience in mind. Mass movements can use this idea by ensuring that any participant likely to be seen by the media is likable to the target audiences. This can mean having a friendly manner and being dressed respectably.

Similarity is another way to increase the perception of credibility. Studies have shown that target audiences perceive advertisers are more credible if they appear similar to them.<sup>62</sup> This phenomenon occurs in business decisions, social issues, and health related issues. Similarity can include a number of factors including background, attire, and race. Mass movements could use this by ensuring that any member likely to be seen by media looks similar to the target audiences in dress, age, mannerisms, and if possible, race.

Physical attractiveness is another factor that increases the perception of credibility.<sup>63</sup> Advertisers who are physically attractive are perceived as being more credible. This may be due to a psychological desire to be attractive and the association of the physical attractiveness of the advertiser to the product or service they are advertising. Target audiences might unconsciously think that if they obey the advertiser, they will be physically attractive themselves. Target audiences are also more likely to pay attention when an attractive person speaks than to an unattractive person.

Mass movements can use these principles by ensuring that anyone from the movement who will be seen by the media is physically attractive. While moving unattractive people away from the cameras and replacing them with attractive people may seem mean and discriminatory, it could improve the branding of the organization.

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<sup>62</sup> Ibid., 251.

<sup>63</sup> Ibid., 253.

## Public Relations During the 1982 Tylenol Murders

The aforementioned theoretical principles of branding in advertising offer guidelines mass movements might follow to improve their chances of achieving their goals. One specific case offers an example of the successful operationalization of some of these guidelines and a good illustration of positive branding.

In 1982, seven people died in Chicago after taking Tylenol that had been contaminated with cyanide.<sup>64</sup> As a result, the brand of the manufacturer of Tylenol, Johnson and Johnson, was in peril due to a public backlash. However, executives immediately acknowledged there was a problem and publically responded. Tylenol was recalled. The company then developed tamper proof containers, making Johnson and Johnson's pharmaceuticals safer than those of the rest of the industry. In the end, what could have destroyed the company, ended up resulting in positive press coverage and a boost to the brand, thereby setting the standard for how to deal with organizational problems.

Nonviolent mass movements could use this model in their branding. If violence occurred at a protest, the movement's organizational branding might suffer. However, the problem could be dealt with if leaders of the movement first carried out an investigation. They could also begin to publically police their own organization at the next event, ejecting anyone who might resort to violence. If the mass movement's policing efforts worked, they could be contrasted with the effects of the government security forces'

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<sup>64</sup> Ibid., 238.

actions. If the movement appeared to police itself better than the government's security forces, the movement's brand might improve.

### Conclusion

The theory of nonviolent resistance initially consisted of using nonviolent methods for the sole reason that violence was believed to be morally wrong. Little emphasis was put on actually achieving an objective other than not sinning through the commission of an act of violence. The rewards for not sinning were assumed to come in heaven. Mahatma Gandhi developed the theory by putting nonviolent resistance to use with the intent of achieving a goal on earth. Martin Luther King, Jr. further developed the theory to include a step-by-step method for achieving victory through nonviolent resistance.

Gene Sharp drastically changed the approach by removing the moral reasons for choosing nonviolent resistance altogether. He developed the idea that the reason to choose nonviolent resistance is that it often has a better chance of achieving victory. He also developed the theory that all governmental power rests on the cooperation of its support structures, and that a government's support structures could be attacked using nonviolent resistance. Sharp and his follower Robert Helvey both developed theories and methods that mass movements could use to formulate and implement nonviolent resistance strategies.

Both Sharp and Helvey discussed methods for gaining and maintaining the support of target audiences, but neither codified the process or called it branding. The business world, with similar needs, has developed much more extensive definitions and models for the process using advertising, psychology, and public relations theory.

This study will examine how nonviolent mass movements brand their organizations and messages. It will examine how they enforce branding. It will also attempt to measure the effects of this branding on the success or failure of the movement. An examination of two historical mass movements will form the basis for the study.

## CHAPTER 3

### RESEARCH METHODOLOGY

This chapter contains the methods used to answer the primary as well as secondary research questions.

#### Research Questions

The primary research question is:

How does branding and brand enforcement affect whether nonviolent mass movements succeed or fail?

Secondary research questions are:

How do nonviolent mass movements develop a brand for their organization?

How do nonviolent mass movements develop a brand for their message?

How do nonviolent mass movements enforce the brand reflected in their message and organization?

#### Method for Analysis

The answer to these questions will be determined by comparing historical examples of branding during nonviolent campaigns. A successful nonviolent campaign will be compared to an unsuccessful campaign and the branding efforts of the respective campaigns will be analyzed. I will analyze the campaigns for their efforts to:

1. Construct and project a positive image (brand) of their organization to target audiences in order to establish credibility and influence.
2. Enforce discipline on their organization to ensure their brand is not damaged.

3. Construct branded messages and communicate them to target audiences to establish credibility and influence.
4. Enforce the branded messaging to maintain credibility and influence.

### Campaigns Studied

The study will use a comparative case study methodology, in which two nonviolent mass campaigns will constitute the cases. The campaigns to be studied will be the Montgomery Bus Boycott and the Occupy Wall Street movement's campaign in 2011. I have chosen to study discreet campaigns instead of entire movements because studying the latter could fill an entire paper. In addition, determining the success or failure of an individual campaign will be more manageable than determining the success or failure of an entire movement.

### Reasons for Choosing Campaigns

I have chosen the Montgomery Bus Boycott and the Occupy Wall Street movement's campaign in 2011 three reasons. There is a wealth of information about all of them—they are data-rich cases. Both campaigns took place over a relatively short time period, so covering their entire history will be feasible. Lastly, each of these campaigns made use of the media to spread information about the movement and its message.

### Causal Relationships

As with any social science examination, the causal relationship between branding, the independent variable, and the success or failure of a campaign, the dependent variable, will be difficult to establish. There are other factors that influence success or failure such as leadership and the level of repression that the movement faces from

authorities. To control for the effects of these other variables, by examining the larger contexts in which the campaigns occurred, I will attempt to determine the extent to which the success or failure of a mass movement was due to its branding. In all likelihood, branding will not be proven to be the definitive reason for the success or failure of a campaign, but it might be a contributing factor. Branding may prove to be a necessary, but not sufficient, cause for success or failure.

### Branding Efforts

In addition to trying to determine whether branding was a factor in the success or failure of a campaign, I will study the attempts each campaign made to brand itself and enforce its branding. I will describe the methods used and then describe their effects. To measure effects, when possible I will use polling data to determine the public perception of a mass movement over time. The public perception of a movement and its message measured over time should be a direct reflection of the effectiveness of the movement's branding efforts.

### Definitions of Successful and Unsuccessful Campaigns

For the purpose of this paper, a successful nonviolent campaign is a campaign by a nonviolent mass movement that achieved the goals it messaged to the public. For instance, if a nonviolent mass movement campaigned to change a government policy and the policy was changed while the movement was still active, the campaign would be viewed as successful.

An unsuccessful nonviolent campaign is a campaign by a nonviolent mass movement that failed to achieve the goals it messaged to the public. For instance, if a

nonviolent mass movement campaigned to change a government policy and the policy was not changed while the movement was still active, the campaign would be viewed as unsuccessful. Unless the organization stated in its messaging that its purpose was just to “raise awareness” on an issue, an organization could not claim that it was successful without achieving its objectives.

Research materials consist of the theories of nonviolent resistance, advertising theory, and histories of past nonviolent mass movements. Chapter 2 contains the review of theoretical literature.

### Organization of Thesis

Historical nonviolent campaigns will be examined in Chapters 4 (the Montgomery Bus Boycott) and 5 (Occupy Wall Street). Each campaign will be assessed for its branding, brand enforcement, and the effects of its branding on the success or failure of the campaign. Chapter 6 will report the lessons learned from the historical examples and recommendations for future research.

## CHAPTER 4

### THE MONTGOMERY BUS BOYCOTT

#### Situation in Montgomery

In 1955, Montgomery, Alabama was like most southern cities, segregated. Public facilities such as restrooms, drinking fountains, and parks were segregated. Buses were segregated into three zones. Only whites were allowed to sit in the front of the bus. The back of the bus was reserved for African Americans. The middle of the bus was open to all, but if whites filled the seats in the front and needed additional seats, African Americans in the middle had to give up their seats to whites.<sup>65</sup> In addition, bus drivers often verbally abused their African American passengers.<sup>66</sup>

#### Fragmentation of the African American Community

The situation showed no signs of changing. The main reason for this was that the African American community was fragmented. Montgomery had a well-educated African American middle class that could have led a movement to end segregation. However, most members of Montgomery's African American middle class were concerned that an active civil rights campaign might put their jobs and positions in jeopardy.<sup>67</sup> Members of

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<sup>65</sup> Sanford Wexler, *The Civil Rights Movement* (New York, NY: Facts on File, 1993), 67.

<sup>66</sup> Lynne Olson, *Freedom's Daughters* (New York, NY: Touchstone, 2001), 88.

<sup>67</sup> King, *Stride Towards Freedom*, 22.

the middle class generally drove cars and thus were not subject to the daily humiliations of bus transit that faced working-class African Americans.<sup>68</sup>

The religious leaders of the African American community were also wary of any challenge to the status quo. They were afraid that any attempt to end segregation might provoke a backlash from the white population. Jo Ann Robinson, the leader of the Women's Political Council, also complained that the religious leaders were more interested in raising their own salaries than helping their congregations and were terrified of anything that might threaten their privileged positions.<sup>69</sup>

### Early Civil Rights Movement

There were, however, several groups attempting to end segregation in Montgomery. E.D. Nixon, a retired Pullman porter, was the president of the Montgomery chapter of the National Association for the Advancement of Colored People (NAACP).<sup>70</sup> He had repeatedly attempted to end the segregation of buses through negotiation with city leaders. Rosa Parks served as his secretary, having joined the NAACP in 1943.<sup>71</sup>

Jo Ann Robinson, a professor at Alabama State College<sup>72</sup> led the Women's Political Council (WPC).<sup>73</sup> The WPC was made up of middle class professional women and worked to register African American voters and also took up various other civil right

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<sup>68</sup> Olson, *Freedom's Daughters*, 92.

<sup>69</sup> *Ibid.*, 114.

<sup>70</sup> Wexler, *The Civil Rights Movement*, 69.

<sup>71</sup> Olson, *Freedom's Daughters*, 97.

<sup>72</sup> Wexler, *The Civil Rights Movement*, 69.

<sup>73</sup> Olson, *Freedom's Daughters*, 89.

causes. In 1950, the WPC began to work with the NAACP to desegregate buses.<sup>74</sup> In 1954, Robinson wrote to Tacky Gayle, the Mayor of Montgomery, and threatened that there would be a boycott if the bus system was not desegregated.<sup>75</sup> There was precedence for public transit boycotts. At the end of the nineteenth century, African Americans in 27 cities had boycotted public transportation in an attempt to end segregation.<sup>76</sup> However, to start a mass movement to end bus segregation in Montgomery, a spark would be needed.

Martin Luther King, Jr. arrived in Montgomery in January 1954.<sup>77</sup> He became the pastor of the Dexter Baptist Church, then seen as a “silk stocking” church, with a congregation made up largely of middle class African Americans.<sup>78</sup> King was bothered by this and worked to increase charitable work within the larger African American community. He did not take part in the fledgling civil rights movement due to the demands of his work and continuing education.<sup>79</sup> He did, however, encourage members of his congregation to register to vote and join the NAACP.<sup>80</sup>

### Montgomery Bus Boycott

In 1955 several African American women were arrested on Montgomery buses, all for a failure to give up seats to white passengers. On March 2, 1955, Claudette Colvin,

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<sup>74</sup> Ibid., 91.

<sup>75</sup> Ibid., 88.

<sup>76</sup> Wexler, *The Civil Rights Movement*, 67.

<sup>77</sup> Ron Ramdin, *Martin Luther King, Jr.* (London: Haus Publishing, 2004), 24.

<sup>78</sup> King, *Stride Towards Freedom*, 11.

<sup>79</sup> Olson, *Freedom's Daughters*, 113.

<sup>80</sup> Ramdin, *Martin Luther King, Jr.*, 26.

a 15 year old student, was arrested.<sup>81</sup> E.D. Nixon, Jo Ann Robinson, and other civil rights leaders met to discuss the case and the possibility of using Colvin's arrest to spark a boycott. Nixon refused to use Colvin's arrest to spark a boycott when it was discovered she was pregnant.<sup>82</sup> Nixon felt that using her as a poster child would discredit the movement. In addition to her pregnancy, there was the fact that she had fought the police while being arrested. The *Montgomery Advertiser* reported on March 10 that she had kicked and scratched the arresting officer.<sup>83</sup> However, Robinson composed a draft flier urging African Americans to boycott Montgomery's buses and prepared to print it on the Alabama State College's mimeograph. The only thing she left off the draft was the date when the boycott was to take place.<sup>84</sup>

On October 21, 1955, Mary Louise Smith, an 18 year old student, was arrested for failing to give up her seat. Again, leaders of the civil rights movement met to discuss using the case to spark the boycott. However Nixon again refused to use the case, claiming that Smith's father was an alcoholic and her family lived in a tar paper shack.<sup>85</sup> To Nixon, both the movement's poster child and his or her family needed to be above reproach.

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<sup>81</sup> The Montgomery Bus Boycott, "Claudette Colvin," accessed November 24, 2014, <http://www.montgomeryboycott.com/claudette-colvin/>.

<sup>82</sup> Olson, *Freedom's Daughters*, 94.

<sup>83</sup> *Montgomery Advertiser*, "Segregation Case Reset for March 18," March 10, 1955, accessed November 24, 2014, <http://www.montgomeryboycott.com/segregation-case-reset-for-march-18/>.

<sup>84</sup> Olson, *Freedom's Daughters*, 93.

<sup>85</sup> *Ibid.*, 94.

Rosa Parks, as E.D. Nixon's secretary, was part of the entire process. With each arrest she became increasingly frustrated with the situation. She knew both girls from her time as a NAACP youth leader and was a friend of Colvin's mother. On December 1, 1955, Parks refused to give up her bus seat to a white passenger and was arrested.<sup>86</sup> Upon hearing of Park's arrest, Nixon rushed to the jail and bailed her out. After getting Park's permission to use her case to spark a boycott of the city buses, Nixon called Martin Luther King, Jr. and informed him of the news. He stated that a boycott was the only way forward. A meeting was immediately scheduled at the Dexter Baptist Church.<sup>87</sup> Nixon also contacted Robinson and asked her to print and distribute fliers.<sup>88</sup>

At the meeting, all of the clergy, except for Martin Luther King, Jr., were hesitant to urge their parishioners to join the boycott. They were only brought around after Nixon cowed them into supporting the boycott.<sup>89</sup> They decided to form the "Montgomery Improvement Association," an organization with the goal of ending bus segregation.<sup>90</sup> Martin Luther King, Jr., despite being the most junior clergyman present, was voted president after no other clergy volunteered.

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<sup>86</sup> Ramdin, *Martin Luther King, Jr.*, 29.

<sup>87</sup> *Ibid.*, 30.

<sup>88</sup> Olson, *Freedom's Daughters*, 112.

<sup>89</sup> *Ibid.*, 115.

<sup>90</sup> Ramdin, *Martin Luther King, Jr.*, 31.

Leadership of the Montgomery Improvement Association was made up of an executive committee, charged with the day to day operations.<sup>91</sup> Leadership was also broken down into several other committees, such as transportation, each charged with specific tasks. All decisions were to be the result of a two-thirds majority vote of members, and the executive committee first had to agree to all proposals. Membership was open to the public. This allowed participation by the community as a whole, but ensured control by the executive committee, which was made up of the founding members of the Montgomery Improvement Association.<sup>92</sup> King wrote that the executive committee worked well together, the will of the majority was accepted, and no “parliamentary rules” were necessary.<sup>93</sup>

On the first day of the boycott, over 90 percent of the African Americans who regularly rode the bus joined the boycott. A ride-sharing organization was established to transport workers to their jobs.<sup>94</sup> When it became clear that the boycott was not going to end on its own, the Montgomery mayor, Tacky Gayle, began a “get tough” campaign against boycotters.<sup>95</sup> In addition to encouraging police harassment, he urged whites to fire African American employees, mostly women employed as maids, who were participating

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<sup>91</sup> Civil Rights Movement Veterans, “Constitution and By-Laws of the Montgomery Improvement Association,” accessed January 12, 2015, [http://www.crmvet.org/docs/56\\_mia\\_const.pdf](http://www.crmvet.org/docs/56_mia_const.pdf).

<sup>92</sup> Martin Luther King Research and Education Institute, “Montgomery Improvement Association,” accessed January 12, 2015, [http://mlk-kpp01.stanford.edu/index.php/encyclopedia/encyclopedia/enc\\_montgomery\\_improvement\\_association/](http://mlk-kpp01.stanford.edu/index.php/encyclopedia/encyclopedia/enc_montgomery_improvement_association/).

<sup>93</sup> King, *Stride Towards Freedom*, 60.

<sup>94</sup> Wexler, *The Civil Rights Movement*, 70.

<sup>95</sup> *Ibid.*, 73.

in the boycott.<sup>96</sup> This request ended up pushing whites to side with the boycott. Newspapers began to fill with letters to the editor from white women wondering, if they fired their maids, would the mayor wash their dishes?<sup>97</sup>

In the end, the Supreme Court ruled against the city of Montgomery and the bus lines were integrated.<sup>98</sup> Martin Luther King, Jr. and the leaders of the protest were accompanied by reporters as they took the first integrated bus ride. The *Advertiser* printed a supportive article describing the transition.<sup>99</sup> Using the Montgomery boycott as an example, African Americans in two other cities, Tallahassee, and Birmingham, began their own bus boycotts.<sup>100</sup> Other cities across the country also ended segregation of buses.<sup>101</sup>

### Branding the Movement

The task of branding the movement was difficult. Movement leaders had to develop a positive organizational brand that would appeal to diverse target audiences. They had to appeal to both middle and working class African Americans. In addition, they had to communicate with both southern and northern whites.

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<sup>96</sup> Olson, *Freedom's Daughters*, 119.

<sup>97</sup> *Ibid.*, 120.

<sup>98</sup> Wexler, *The Civil Rights Movement*, 78.

<sup>99</sup> Forest Castleberry, "Boycott Leaders Take Desegregated Bus Ride," *The Montgomery Advertiser*, December 21, 1956, accessed November 24, 2014, <http://www.montgomeryboycott.com/boycott-leaders-take-desegregated-bus-ride/>.

<sup>100</sup> Peter Ackerman and Jack Duval, *A Force More Powerful* (New York, NY: Palgrave, 2004), 309.

<sup>101</sup> Ackerman, *A Force More Powerful*, 311.

Despite these hurdles, the protest leaders demonstrated good organizational branding throughout the movement. They established the ideal of the organization's members (organizational branding) by using Rosa Parks as their icon. Making Martin Luther King, Jr. the figurehead of the movement was also key to organizational branding and organizational branding enforcement. Over the course of the movement, although not discussed as such, the organization's brand righteous cause, nonviolence, and respectability became its brand.

One characteristic of the participants in the boycott that helped organizational branding required no work from the organization's leadership. Sixty-three percent of African American female workers in Montgomery were maids.<sup>102</sup> Prior to the boycott, these women generally took the bus to the homes of their employers (usually middle class whites) but stopped taking the bus once the boycott began. To the middle class white community of Montgomery, the face of the boycott was not a threatening amorphous African American group. It was the women who cooked, cleaned, and took care of their children. This established the respectability aspect of the organization's branding. Some housewives, even if opposed to desegregation in principle, stood behind their maids and picked them up every morning by car and drove them home at night.<sup>103</sup>

#### Use of Reporters for Organizational Branding

King clearly understood that the public's view of the boycott would depend upon the movement's portrayal in the media. This made a sympathetic portrayal of the

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<sup>102</sup> King, *Stride Towards Freedom*, 14.

<sup>103</sup> *Ibid.*, 64.

movement by the media essential. To get reporters across the country to promote the movement's brand, King recommended that Robinson be put in charge of a bi-monthly newsletter in order to, "give our numerous friends over the nation and the various newspapers an accurate account of developments in the bus situation."<sup>104</sup> He specifically mentioned the skill and level of responsibility that this task entailed and recommended providing her with a salary. In setting up a newsletter as the official mouthpiece of the Montgomery Improvement Association, King also was able to centralize the movement's official communications with reporters, simplifying message and organizational branding.

An example of effects of the branding efforts can be seen in the reporting of the *Montgomery Advertiser*, the city's primary newspaper. Initially the *Advertiser* published stories that made the boycott seem conspiratorial at best and violent at worse. On December 4, 1955 the paper printed a story written by Joe Azbell, the *Advertiser's* City Editor, about a "top secret meeting of Montgomery Negroes" and described the how the clergy refused to name the organizers of the movement.<sup>105</sup> The following day, the *Advertiser* ran another story describing the bus boycott and a violent incident resulting in the arrest of an African American teenager.<sup>106</sup>

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<sup>104</sup> Martin Luther King Research and Education Institute, "Recommendations to the MIA Executive Board," accessed January 12, 2015, [http://mlk-kpp01.stanford.edu/primarydocuments/Vol3/24May%201956\\_RecommendationsToBoard.pdf](http://mlk-kpp01.stanford.edu/primarydocuments/Vol3/24May%201956_RecommendationsToBoard.pdf).

<sup>105</sup> Joe Azbell, "Negro Groups Ready Boycott of City Bus Lines," *The Montgomery Advertiser*, December 4, 1955, accessed November 24, 2014, <http://www.montgomeryboycott.com/negro-groups-ready-boycott-of-city-lines/>.

<sup>106</sup> Bunny Honicker, "Negress Draws Fine Segregation Case Involving Bus Ride," *The Montgomery Advertiser*, December 5, 1955, accessed November 24, 2014,

However, over time the stories published in the *Advertiser* became more favorable towards the boycott. On January 10, 1956, the *Advertiser* published a story about a white Lutheran minister involved in the protests. The story was positive and described the peaceful nature of the protest, the goals of the protest, and the police harassment the minister experienced.<sup>107</sup> On January 31, 1956 the *Advertiser* published a story that portrayed the boycott in an even more positive light. It described how after the bombing of his house, Martin Luther King, Jr. urged the crowd that had gathered to go home and to not take part in violent action.<sup>108</sup> Finally, on December 21, 1956, the newspaper ran an article about the leaders of the boycott taking their first desegregated bus ride. It described the African American passengers as being well dressed and courteous and reported that the ride went off without incident. It ended with a description of how several white men watching the scene remarked that they never thought that they would see desegregated busses.<sup>109</sup>

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<http://www.montgomeryboycott.com/negress-draws-fine-segregation-case-involving-bus-ride/>.

<sup>107</sup> Tom Johnson, "The Mechanics of the Bus Boycott," *The Montgomery Advertiser*, January 10, 1956, accessed November 24, 2014, <http://www.montgomeryboycott.com/the-mechanics-of-the-bus-boycott/>.

<sup>108</sup> Joe Azbell, "Bomb Rocks Residence of Bus Boycott Leader-None Injured After Bombing of Kings Home," *The Montgomery Advertiser*, January 31, 1956, accessed November 24, 2014, <http://www.montgomeryboycott.com/bomb-rocks-residence-of-bus-boycott-leader-none-injured-after-bombing-of-kings-home/>.

<sup>109</sup> Forest Castleberry, "Boycott Leaders Take Desegregated Bus Ride," *The Montgomery Advertiser*, December 21, 1956, accessed November 24, 2014, <http://www.montgomeryboycott.com/boycott-leaders-take-desegregated-bus-ride/>.

On January 10, 1957, six bombings targeted churches and the homes of boycott leaders.<sup>110</sup> An editorial writer for the *Montgomery Advertiser*, Grover Hall, a segregationist, described the continued opponents of bus desegregation as “ruffians” and a “handful of terrorists” and called for city leaders to end the violence.<sup>111</sup> He then complained that the violence discredited the South.<sup>112</sup> In the *Advertiser*, the opponents of the boycott, rather than the boycotters, were being portrayed as dangerous.

Over the course of the boycott, a clear progression in the press coverage of the boycott by the *Montgomery Advertiser* can be seen. At first, the coverage gave the impression that the boycott was a shadowy conspiracy. Later the coverage became more sympathetic towards the protest and its supporters. By the end of the boycott, the tone of the newspaper’s articles had become fully supportive of the boycott and made the opponents of bus desegregation seem dangerous. Throughout the course of this evolution, it is likely that the newspaper’s reporters were influenced by what they saw and changed their tone. In this way, the *Advertiser’s* reporters were won over by the movement’s branding, particularly its respectability and nonviolence, and began promoting the movement’s brand themselves in their newspaper. This would make sense, as they would have observed (and reported) the protesters maintaining a nonviolent policy and respectful manner despite police harassment and occasional violence directed against them. In this way the movement was able to indirectly influence the media.

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<sup>110</sup> Wexler, *The Civil Rights Movement*, 78.

<sup>111</sup> King, *Stride Towards Freedom*, 167-168.

<sup>112</sup> Donnie Williams and Wayne Greenhaw, *The Thunder of Angels: The Montgomery Bus Boycott and the People Who Broke the Back of Jim Crow* (Chicago, IL: Lawrence Hill Books, 2006), 261-262.

Joe Azbell claimed in a 1985 interview that he had been especially impressed after seeing Martin Luther King, Jr. calm the crowd that gathered after the bombing of his house.<sup>113</sup> Azbell had arrived at King's house moments after the explosion and had been immediately surrounded by a mob of armed and angry local residents who wanted revenge. King's subsequent speech calmed the crowd and they dispersed peacefully. Azbell was an unlikely person to have been a supporter of the civil rights movement. He would go on to serve as the communications director for George Wallace's 1968 and 1972 presidential campaigns.<sup>114</sup> Winning him over was a testament to the power of the boycott's branding. That said, Azbell did have a professional relationship (as a reporter) with E.D. Nixon prior to the boycott. Nixon would meet Azbell periodically to pass information regarding the African American community. They met to discuss the upcoming boycott immediately after the arrest of Rosa Parks.<sup>115</sup>

### Branding the Icon

Upon hearing of Rosa Parks' arrest, E.D. Nixon reportedly stated, "My god, look what segregation has put in our hands!"<sup>116</sup> From the perspective of branding, Parks was

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<sup>113</sup> Eyes on the Prize Interviews, "Interview with Joe Azbell," accessed January 16, 2015, [http://digital.wustl.edu/cgi/t/text/text-idx?c=eop;cc=eop;rgn=main;view=text;idno=azb0015.057\\_0.005](http://digital.wustl.edu/cgi/t/text/text-idx?c=eop;cc=eop;rgn=main;view=text;idno=azb0015.057_0.005).

<sup>114</sup> Eyes on the Prize Interviews, "Joe Azbell," accessed January 17, 2015, <http://library.wustl.edu/units/spec/filmandmedia/collections/henry-hampton-collection/eyes1/azbell.htm>.

<sup>115</sup> Eyes on the Prize Interviews, "Interview with Joe Azbell."

<sup>116</sup> Olson, *Freedom's Daughters*, 110.

perfect because she was credible to target audiences, both African American and white.

Parks best summed up why she was credible and such a perfect icon for the movement:

I had no police record, I'd worked all my life, I wasn't pregnant with an illegitimate child. The white people couldn't point to me and say that there was anything I had done to deserve such treatment except being born black.<sup>117</sup>

Rosa Park's credibility was rooted in her likability, similarity, and physical attractiveness, key components of credibility as described by Perloff in *The Dynamics of Persuasion*.<sup>118</sup> She demonstrated her likability during her arrest by remaining calm and dignified and not fighting with the police. Her likability affected even the arresting officers. Instead of dragging her off the bus, as had been done to other protesters, they led her off the bus and even carried her purse and shopping bag.<sup>119</sup> Her similarity to target audiences was established by the fact that she was a worker. She was portrayed as having refused to give up her seat because she was tired, a situation that would have brought sympathy.<sup>120</sup> She was also light skinned, which would have increased her similarity to white target audiences.<sup>121</sup> Parks' physical attractiveness was evident in all pictures, even her mug shots, where she appeared well dressed, well groomed, and dignified.<sup>122</sup>

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<sup>117</sup> Ibid., 111.

<sup>118</sup> Richard M. Perloff, *The Dynamics of Persuasion* (New York, NY: Routledge, 2014), 250-3.

<sup>119</sup> Olson, *Freedom's Daughters*, 109.

<sup>120</sup> Wexler, *The Civil Rights Movement*, 68.

<sup>121</sup> Olson, *Freedom's Daughters*, 95.

<sup>122</sup> The Montgomery Bus Boycott, "Rosa Parks," accessed November 24, 2014, <http://www.montgomeryboycott.com/rosa-parks/>.

Parks' credibility made her an ideal icon for the movement's organizational branding. However, one aspect of Park's life could have damaged her credibility. She had been in the NAACP since 1943 and served as Nixon's secretary. In addition, her husband had been a member of an organization that raised money for the legal defense of the Scottsboro Boys, a group of nine African American teenagers accused of raping two white women.<sup>123</sup> Had any of this information appeared in the media, she might have been portrayed as a troublemaker. The fact that this information did not appear in the media at the time suggests that Nixon may have neglected – or not chosen - to inform Azbell (the *Montgomery Advertiser's* city editor) about Parks' history when they met to discuss the upcoming boycott.<sup>124</sup>

Nixon's careful selection of an incident to spark the protest ensured that the icon they chose, Rosa Parks, would be credible from the beginning. With Parks, the movement did not have to attempt to influence the media to portray her in a biased manner. The only requirement of the movement's leaders was not to mention her involvement in the NAACP and her husband's role in the Scottsboro case. In this manner, Nixon accomplished key tasks of organizational branding simply by selecting Rosa Parks.

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<sup>123</sup> The Rise and Fall of Jim Crow, "The Scottsboro Case (1931)," accessed February 10, 2015, [http://www.pbs.org/wnet/jimcrow/stories\\_events\\_scotts.html](http://www.pbs.org/wnet/jimcrow/stories_events_scotts.html).

<sup>124</sup> Bunny Honicker, "Negress Draws Fine Segregation Case Involving Bus Ride," *The Montgomery Advertiser*, December 5, 1955, accessed November 24, 2014, <http://www.montgomeryboycott.com/negress-draws-fine-segregation-case-involving-bus-ride/>.

## Branding the Leadership

While King would go on to take a much larger role in the planning and leadership of the national civil rights movement, in the Montgomery bus boycott, his role only began after the boycott had been planned and had commenced. While he became the leader of the movement,<sup>125</sup> his appointment was made after plans for the boycott had been made and fliers were being distributed.<sup>126</sup>

The movement's true leaders were Nixon and Robinson. However, Nixon, with only 16 months of formal education and a life spent as a Pullman Porter,<sup>127</sup> would have struggled to maintain credibility with target audiences, particularly the middle class who would have expected a polished, well-educated leader. Robinson, while well-educated,<sup>128</sup> was female, which at the time may have made her a less attractive choice as a leader.

Branding likely played a role in the selection of a minister as the leader of the organization, because such an appointment would expand the movement's influence over the entire African American community, middle and working class. However, King's selection as the leader instead of one of the other ministers was likely not based on branding. King was reluctant to serve as the leader because he was the youngest minister in Montgomery, his wife had given birth two weeks prior to Park's arrest,<sup>129</sup> and he was

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<sup>125</sup> Wexler, *The Civil Rights Movement*, 69.

<sup>126</sup> Olson, *Freedom's Daughters*, 111.

<sup>127</sup> King Encyclopedia, "Nixon, Edgar Daniel (1899-1987)," accessed December 5, 2014, [http://mlk-kpp01.stanford.edu/kingweb/about\\_king/encyclopedia/nixon\\_e\\_d.htm](http://mlk-kpp01.stanford.edu/kingweb/about_king/encyclopedia/nixon_e_d.htm).

<sup>128</sup> Olson, *Freedom's Daughters*, 89.

<sup>129</sup> Ramdin, *Martin Luther King, Jr.*, 130.

working on his doctorate. King volunteered-and was unanimously voted president of the Montgomery Improvement Association only after no other minister present agreed to lead the movement.<sup>130</sup>

While his selection may have been the result of a lack of a better option, King proved to be an ideal choice. Martin Luther King, Jr. was well educated, articulate, and able to connect with both poor and middle class African American communities through his position as a minister. Additionally, King's insistence on not just nonviolence but loving one's enemies made the movement more attractive to white audiences as well.<sup>131</sup> King expanded the target audience to whites across the country by writing to the *New York Times* and explaining that the goals of movement were not to create a hate campaign or a black against white war, but to stand against injustice.<sup>132</sup> Through this, he promoted the organization's brand of righteous cause, nonviolence, and respectability.

#### Organizational Branding Enforcement

Protest leaders also practiced excellent organizational branding enforcement by ensuring that members of the movement stuck to the agreed upon nonviolent principles. This effort, particularly in the maintenance of nonviolent discipline, prevented the misbehavior of individual members from negatively affect the public's view of the organization. Protest leaders did this in two ways. The first method was educating the

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<sup>130</sup> Olson, *Freedom's Daughters*, 115.

<sup>131</sup> The Montgomery Bus Boycott, "The Reverend Martin Luther King Jr.," accessed November 24, 2014, <http://www.montgomeryboycott.com/the-reverend-martin-luther-king-jr/>.

<sup>132</sup> Ramdin, *Martin Luther King, Jr.*, 37.

participants in nonviolent principles and continuously reinforcing those principles at meetings. The second method was intervening in situations that threatened to tarnish the organization's branding. Interestingly, these methods of organizational branding enforcement were generally successful by themselves; and as he noted in his book *Stride Towards Freedom*, King did not have to expel any participant from the movement.

The first method initially presented King with a problem. He later wrote about the dilemma he had crafting speeches that were both "militant" enough to keep participants motivated and at the same time moderate enough to keep their actions within the organization's nonviolent principles.<sup>133</sup> Without being forceful enough about the importance of their cause, he risked the movement's crumbling when the participants lost interest. If he was too forceful, he ran the risk of encouraging violence. He managed to find a middle ground by describing the righteousness of their cause and how their self-respect was at stake. He then described the Christian concept of loving one's enemies and the importance of nonviolence.

The need to keep boycotters from engaging in violence continued throughout the campaign. The main problem was coping with three viewpoints held by some boycotters that threatened the nonviolent element of the movement's branding: the perceived need for a more forceful approach, the belief that violent actions might benefit the movement, and the desire for revenge.<sup>134</sup> King wrote that several members of the Executive Committee, while supporting him publicly, told him in private that the movement needed to be more "militant," as they felt that nonviolence gave the appearance of weakness.

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<sup>133</sup> King, *Stride Towards Freedom*, 48.

<sup>134</sup> *Ibid.*, 75-76.

King also described how he was told by one participant that what they really needed to do was to kill several white people. The justification was that it would show the white community that the African American community was not afraid and it would force the federal government to step in. Another problem was that some protesters, while agreeing not to *initiate* violence, stated that if attacked, they would retaliate. King responded to these divergent views by using Bible passages that stressed the need for forgiveness, and thereby managed to keep the actions of the boycotters in line with the agreed upon organizational branding.

King and the other protest leaders would continue to motivate the boycotters to adhere to the organization's branding using this basic theme. Follow-up sessions to reinforce the theme took place during weekly meetings.<sup>135</sup> Boycotters would meet for church services followed by lessons on the importance of nonviolence. They would then receive a pep talk to encourage them to continue with the boycott.

The best example of a protest leader intervening in a situation that threatened to upset the organization's branding was when Martin Luther King, Jr.'s house was bombed on January 30, 1956. Immediately after the bombing, an angry crowd gathered, some of whom were armed. King realized immediately that the nonviolent struggle was threatening to turn violent.<sup>136</sup> After verifying his family was safe, he addressed the crowd. According to Joe Azbell he stated:

We believe in law and order. Don't get panicky. Don't do anything panicky at all. Don't get your weapons. He who lives by the sword will perish by the sword. Remember that is what God said. We are not advocating violence. We want to

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<sup>135</sup> Ibid., 73.

<sup>136</sup> Ibid., 127.

love our enemies. I want you to love our enemies. Be good to them. Love them and let them know you love them. I did not start this boycott. I was asked by you to serve as your spokesman. I want it to be known the length and breadth of this land that if I am stopped this movement will not stop. If I am stopped our work will not stop. For what we are doing is right. What we are doing is just. And God is with us.<sup>137</sup>

Not only did the speech ensure that no violence that might have discredited the movement occurred, but King was able to gain the moral high ground. He calmed the crowd and demonstrated, in front of reporters, that members of the movement would not use violence, even if attacked. He also demonstrated that the movement could not be stopped through violent intimidation. King did this by sticking to the same points he used to educate the boycotters at the beginning of the movement. He highlighted the righteousness of their struggle and its nonviolent nature.

Given that King made the speech 15 minutes after his house was bombed, it is unlikely that the speech was pre-planned or coordinated within the movement. However, the full speech was printed the next day in the *Montgomery Advertiser* and would have been quickly disseminated throughout the entire community. King's example could then be used as an example of how to act when confronted with violence. It also demonstrated key elements of the movement's branding, righteousness and nonviolence, to the wider community.

Another example of the movement's leadership intervening was during a weekly meeting when a guest speaker was giving a pep talk to the boycotters. The speaker, a minister, made several complaints about the white community. He then ended the speech

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<sup>137</sup> Joe Azbell, "Bomb Rocks Residence of Bus Boycott Leader-None Injured After Bombing of Kings Home," *The Montgomery Advertiser*, January 31, 1956, accessed November 24, 2014, <http://www.montgomeryboycott.com/bomb-rocks-residence-of-bus-boycott-leader-none-injured-after-bombing-of-kings-home/>.

by referring to white supremacists as “dirty crackers.”<sup>138</sup> This attitude could have negatively affected the branding of the movement in two ways. Boycotters might have followed the minister’s example and started behaving disrespectfully towards the white community. Secondly, if opponents of the boycott had heard the speech, they could also have used it discredit the entire organization by making it look dangerous. The minister was taken aside and informed that insulting language had no part in the movement. By stepping in, King preserved the movement’s respectability.

### Organizational Branding Enforcement After Desegregation

The Montgomery Improvement Association understood that after the protest ended, misbehavior by African American bus passengers could discredit the entire movement. The association therefore printed instructions for riding the newly desegregated busses.<sup>139</sup> The instructions told the former boycotters to be proud of their accomplishments but be polite and not boastful. In addition, they were instructed that if they were attacked verbally they should remain polite and retain their nonviolent principles even if physically attacked. The final instruction to former boycotters was that if they felt they could not follow these principles, continue walking for another week or two.

In addition to the printed instructions, the association held classes. During the classes, chairs were lined up like bus seats. Selected students were told to role play white

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<sup>138</sup> King, *Stride Towards Freedom*, 74.

<sup>139</sup> King Encyclopedia, “Integrated Bus Suggestions,” accessed January 14, 2015, [http://mlk-kpp01.stanford.edu/index.php/encyclopedia/documentsentry/integrated\\_bus\\_suggestions/](http://mlk-kpp01.stanford.edu/index.php/encyclopedia/documentsentry/integrated_bus_suggestions/).

passengers acting rudely. The other students then practiced sitting next to the “white passengers.” According to King, many of the boycotters were unable to control their emotions and responded physically or verbally to the provocations. When this happened, the students were taken aside and the instructors would work to redirect their actions in a nonviolent direction. At the end of each scenario, there would be a class discussion to help the participants internalize the key points.<sup>140</sup>

The post- desegregation organizational branding enforcement efforts were a success. While there were several incidents of white passengers behaving rudely towards African American passengers, the former boycotters remained respectful and nonviolent.<sup>141</sup> In addition, The Associated Press printed articles on the bus riding classes<sup>142</sup> and the *Montgomery Advertiser* printed an article describing the respectful nature of the former boycotters,<sup>143</sup> which would have further helped the organizational branding.

#### Overall branding

Overall, the branding of the movement was effective. By involving religious leaders, E. D. Nixon managed to unite the African American community and get over 90 percent of it to participate in the boycott. The movement’s brand-righteous cause,

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<sup>140</sup> King, *Stride Towards Freedom*, 156.

<sup>141</sup> *Ibid.*, 165.

<sup>142</sup> Associated Press, “School Prepares Negroes for Mass Return to Buses,” December 15, 1956, accessed November 24, 2014, <http://www.montgomeryboycott.com/school-prepares-negroes-for-mass-return-to-buses/>.

<sup>143</sup> Castleberry, “Boycott Leaders Take Desegregated Bus Ride.”

nonviolence, and respectability-was both appealing and credible to target audiences. Boycotters came to be portrayed in the media as peaceful and dignified. Their opponents came to be portrayed as violent and disrespectful.<sup>144</sup> However, the movement started off without a particularly sophisticated branding strategy.

Nixon demonstrated an innate understanding for branding when he refused to use Claudette Colvin or Mary Louise Smith as sparks for the boycott and finally chose Rosa Parks. However, his strategy was based on simply waiting for an ideal icon to appear that would provide respectability and a righteous cause to the movement. Other than not informing reporters of Parks' history in the NAACP and her husband's involvement in the Scottsboro case, he did not have to do anything to manage Parks' image to ensure her appeal to target audiences.

Martin Luther King, Jr.'s views on the righteousness of their cause, respectability, and nonviolence did not come from a plan for branding a mass movement to ensure maximum appeal to target audiences. They came from his personal beliefs and his study of other pacifists like Thoreau and Gandhi. His methods, however, when taught to the African American community, proved effective in branding the movement. The members of the movement, through their actions, gave the moment its effective branding.

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<sup>144</sup> Williams, *The Thunder of Angels: The Montgomery Bus Boycott and the People Who Broke the Back of Jim Crow*, 261-262.

## CHAPTER 5

### OCCUPY WALL STREET

In 2011, the Occupy Wall Street movement began when protesters set up a campsite in a small park several blocks from Wall Street. The occupiers had a variety of grievances, including economic inequities, unemployment, the bailouts given to the banking industry, and the perceived influence of corporations on the political process. The movement used a horizontal organizational system, rejecting traditional vertical organizational methods. Similar movements spread to cities around the world; however within a year, the movement had largely disbanded. Despite the flurry of initial media coverage, the movement had no lasting impact.

The failure was due to the movement's decline in popularity. Despite initial widespread support and anger against financial institutions, this decline in popularity occurred because of the movement's inability to brand itself in a way that would appeal to target audiences. The branding failure was likely due to the movement's lack of an effective decision-making body. Without such a body, it was unable to effectively plan or execute branding or brand enforcement by controlling messaging and actions of its members.

#### Events Leading to the Occupation

In 2007, the United States' economy slipped into a recession that affected the livelihood of a large percentage of Americans. Factors affecting Americans included an increase in mortgage foreclosures, a decline in home prices, an increase in

unemployment, a decrease in average earnings, and an increase in oil prices.<sup>145</sup> Home foreclosures more than doubled in 2007 to over one million houses as a result of the collapse of subprime mortgages.<sup>146</sup> This caused a drop in housing prices which, in combination with the other factors caused the nation's GDP to drop.<sup>147</sup>

Unemployment increased from 4.6 percent in 2007 to 9.6 percent in 2010.<sup>148</sup> Particularly hard hit were younger Americans. The Pew Research Council noted that in 2010, the employment rate for 18-24 year olds was at its lowest point since 1948, when the government began collecting this data. The widespread unemployment hit the confidence of younger Americans, with only 43 percent of 18-34 year olds saying they could find another job if they lost their current position, compared to 65 percent in 1998. A ripple effect potentially threatened to affect the future of the country - 31 percent of 18-34 year olds polled stated that they had put off marriage or having children due to the economic situation.<sup>149</sup>

The increase in unemployment and decline of incomes, combined with several high-profile bailouts in the financial industry, led to a decline in trust in those managing

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<sup>145</sup> Washington Post, "A Brief History of U.S. Unemployment," accessed March 31, 2015, <http://www.washingtonpost.com/wp-srv/special/business/us-unemployment-rate-history/>.

<sup>146</sup> Joint Center for Housing Studies of Harvard University, *The State of the Nation's Housing 2008* (Boston, MA, 2008), 3, accessed March 31, 2015, <http://www.jchs.harvard.edu/sites/jchs.harvard.edu/files/son2008.pdf>.

<sup>147</sup> *Ibid.*, 9.

<sup>148</sup> Washington Post, "A Brief History of U.S. Unemployment."

<sup>149</sup> Pew Research Center, *Young, Underemployed and Optimistic*, February 2012, accessed March 31, 2015, <http://www.pewsocialtrends.org/2012/02/09/young-underemployed-and-optimistic/>.

the financial system. In 2009, the General Societal Survey found that confidence in the people who were running banks and financial institutions had fallen to a 40-year low.<sup>150</sup> In addition, a Times/Bloomberg poll found that Americans disliked the idea of using taxes to fund bailouts of financial firms.<sup>151</sup> The recession, combined with the government bailout of the financial industry, large bonuses given to executives, and perceived financial wrongdoing, created a significant amount of popular resentment towards the financial industry.<sup>152</sup>

### Inception of Occupy Wall Street

The idea for the Occupy Wall Street movement came from an email exchange between Kalle Lasn and Micah White on June 9, 2011. Kalle Lasn was the founder of Adbusters, a website and magazine publishing articles promoting a variety of causes including anti-capitalism, anti-consumerism, and environmentalism. The two decided to call the movement “Occupy Wall Street.” They decided to start the “occupation” on September 17, 2011.<sup>153</sup> Lasn and White saw the movement as a way to channel the

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<sup>150</sup> Lindsay A. Owens, “40-Year Low in America’s View of Wall Street,” *CNN*, October 7, 2011, accessed March 31, 2015, <http://www.cnn.com/2011/10/07/opinion/owens-wall-street-disapproval/>.

<sup>151</sup> Los Angeles Times/Bloomberg National Political and Economic Survey, “Public Blames Wall Street for Its Own Troubles,” September 23, 2008, accessed March 31, 2015, <http://media.trb.com/media/acrobat/2008-09/42527811.pdf>.

<sup>152</sup> Adam Nagourney, “Bracing for a Backlash Over Wall Street Bailouts,” *The New York Times*, March 15, 2009, accessed March 31, 2015, [http://www.nytimes.com/2009/03/16/us/politics/16assess.html?\\_r=0](http://www.nytimes.com/2009/03/16/us/politics/16assess.html?_r=0).

<sup>153</sup> Nathan Schneider, “From Occupy Wall Street to Occupy Everywhere,” *The Nation*, October 31, 2011, accessed March 31 2015, <http://www.thenation.com/article/163924/occupy-wall-street-occupy-everywhere#>.

popular resentment of financial institutions and the management of the United States economy.<sup>154</sup>

At Lasn's direction, Adbuster's art department produced and distributed a poster online that would become an icon for the movement. It showed a dancer on top of the Wall Street bull statue. After making the decision to start the occupation, Lasn asked readers of Adbusters to send him recommendations for demands. Almost immediately after the image was posted online, Justine Tunney, a software developer and anarchist, registered the domain name "occupywallstreet.org." The website, administered by a team of fellow anarchists, would become the official online headquarters of the movement.<sup>155</sup>

### Planning for Occupy Wall Street

Micah White contacted an existing organization, New Yorkers Against Budget Cuts, for assistance with planning the occupation. New Yorkers Against Budget Cuts agreed to devote a portion of their planned protest on August 2, 2011 to planning the Occupy Wall Street protests. When David Graeber, a professor at London University and an anarchist theorist, asked Micah White for guidance on what to discuss at the initial meeting, White responded that the goal was, "getting the meme out there, getting people on the streets. We are not trying to control what happens."

On August 2, anarchists took control of the planning meeting. These anarchists developed the idea that the movement would use "horizontal" organizational methods.

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<sup>154</sup> Occupy Wall Street, "About," accessed March 31, 2015, <http://occupywallst.org/about/>.

<sup>155</sup> Mattathias Schwartz, "Pre-Occupied," *The New Yorker*, November 28, 2011, accessed March 31, 2015, <http://www.newyorker.com/magazine/2011/11/28/pre-occupied>.

Leadership was shared by all participants and all decisions made by consensus, with all members wishing to speak on an issue given a chance. In keeping with the horizontal nature, anyone could show up and participate in the movement. However, almost immediately two facilitators, David Graeber and Marisa Holmes, became de-facto “first among equals” and took a leadership role.<sup>156</sup> Holmes was an anarchist filmmaker who had spent several months in Egypt covering the Tahir square protests.<sup>157</sup>

### Beginning of the Occupation and Governance Body

On September 17, 2011, the occupation began with roughly 1,000 protesters gathered at Zuccotti Park, a privately owned park located one block from the New York Stock Exchange. They formed the first “General Assembly,” the leadership body that would guide the movement. The General Assembly, like the original planning meeting, operated as a horizontal organization.<sup>158</sup> All participants were invited to make proposals. Others voted to “agree,” “disagree,” or “block” through hand signals.<sup>159</sup> A 90 percent majority was required to approve any decision, but only after every participant who signaled a “block” had been given an opportunity to speak. With these rules, the general assembly had to administer the protest camp and plan the strategy of the movement.<sup>160</sup>

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<sup>156</sup> Ibid.

<sup>157</sup> Mark Binelli, “The Battle for the Soul of Occupy Wall Street,” *Rolling Stone*, June 21, 2012, accessed March 31, 2015, <http://www.rollingstone.com/politics/news/the-battle-for-the-soul-of-occupy-wall-street-20120621?page=2>.

<sup>158</sup> Schwartz, “Pre-Occupied.”

<sup>159</sup> #Occupy Wall Street, “General Assembly Guide,” accessed March 31, 2015, <http://www.nycga.net/resources/general-assembly-guide/>.

<sup>160</sup> Schwartz, “Pre-Occupied.”

With these tasks, the general assembly was implicitly responsible for the branding of the movement.

### Goals of Occupy Wall Street

On September 20, 2011, White and Lasn sent a list of demands for the Occupy Wall Street movement to Holmes. The demands, in the form of a letter to the President, included ideas such as strengthened financial regulations, a crackdown on white collar crime, and an investigation into political corruption.<sup>161</sup> Instead of using Lasn's demands, on September 29, the General Assembly enacted the "Declaration of the Occupation of New York City." The declaration contained a list of 22 grievances, not demands, which it warned were not all-inclusive. As a solution to the listed grievances, it urged people to protest by joining the occupation.<sup>162</sup>

The Occupy Wall Street movement would continue to reject the idea of making demands as a matter of principle. Facilitators such as Graeber, citing anarchist theory, fought against making demands, reasoning that the movement aimed to upset the current world order and thus to deny the legitimacy of existing political institutions. Any demands would implicitly mean that the movement was open to negotiation with existing institutions to achieve limited objectives.<sup>163</sup> In addition to this philosophical opposition,

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<sup>161</sup> Ibid.

<sup>162</sup> Occupy Forum, "Declaration of the Occupation of New York City," September 30, 2011, accessed March 31, 2015, <http://occupywallst.org/forum/first-official-release-from-occupy-wall-street/>.

<sup>163</sup> David Graeber, "Occupy Wall Street's Anarchist Roots," Letter to *Al Jazeera*, November 30, 2011, accessed March 31, 2015, <http://www.aljazeera.com/indepth/opinion/2011/11/2011112872835904508.html>.

the composition of the movement also precluded the adoption of a specific set of demands. Protesters ranged from anarchists to “Daily Show” liberals and everything in between, and each had his or her own reasons for protesting.<sup>164</sup>

### Growth of the Movement

By mid-October, the movement had spread to cities across North America, Europe, and Asia.<sup>165</sup> Commentators compared the movement to the Arab Spring, which had led to the removal of governments across the Middle East and North Africa. *Time* magazine would go on to name “The Protester” as its person of the year in 2012.<sup>166</sup>

### Changes to Governance

As time passed, it became clear to the movement’s facilitators that the General Assembly was not working. The vast majority of participants did not bother to attend General Assembly meetings. Those who did attend became frustrated with the amount of time it took to make simple decisions. For instance, a discussion over whether to purchase coffee and what type of coffee to purchase took over an hour of debate.<sup>167</sup> Even

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<sup>164</sup> Schwartz, “Pre-Occupied.”

<sup>165</sup> Derek Thompson, “Occupy the World: The ‘99 Percent’ Movement Goes Global,” *The Atlantic*, October 15, 2011, accessed March 31, 2015, <http://www.theatlantic.com/business /archive/2011/10/occupy-the-world-the-99-percent-movement-goes-global/246757/>.

<sup>166</sup> Andrew Ross Sorkin, “Occupy Wall Street: A Frenzy That Fizzled,” *New York Times*, September 17, 2012, accessed March 31, 2015, [http://dealbook.nytimes.com /2012/09/17/occupy-wall-street-a-frenzy-that-fizzled/?\\_php=true&\\_type=blogs&\\_r=0](http://dealbook.nytimes.com /2012/09/17/occupy-wall-street-a-frenzy-that-fizzled/?_php=true&_type=blogs&_r=0).

<sup>167</sup> Cara Buckley and Colin Moynihan, “Occupy Wall Street Protest Reaches a Crossroads,” *New York Times*, November 4, 2011, accessed March 31, 2015, <http://www.nytimes.com/2011/11/06/nyregion/occupy-wall-street-protest-reaches-a-crossroads.html?ref =nyregion>.

Marisa Holmes remarked to a reporter, “The General Assembly is beautiful, but it’s not an effective decision making body.”<sup>168</sup> It was with these problems in mind that the General Assembly voted to form a “Spokes-Council” on September 28. The “Spokes-Council,” a collection of representatives from smaller groups, exercised limited day-to-day control over the movement.<sup>169</sup>

### Changes to Demographics of the Movement

During the winter of 2011 to 2012, the movement found it harder to retain participants’ interest in occupation, and on average the number of occupiers sleeping in the park each night dropped to ~200. The park itself developed into its own city, with safe and unsafe neighborhoods. The east side of the park was the safer area inhabited by political science graduates and relatively free of drugs or alcohol.<sup>170</sup> A significant portion of the east side occupiers also did not sleep in the park. The west side of the park became more violent and was inhabited by anarchists and drug users.<sup>171</sup>

Homeless people also began to stay at Occupy gatherings across the country, where they received food and clothing and ended up representing an estimated 30 percent of those camping at Occupy sites. Some occupiers complained that the homeless made

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<sup>168</sup> Schwartz, “Pre-Occupied.”

<sup>169</sup> Buckley, “Occupy Wall Street Protest Reaches a Crossroads.”

<sup>170</sup> Cara Buckley and Matt Flegenheimer, “At Scene of Wall St. Protest, Rising Concerns About Crime,” *New York Times*, November 8, 2011, accessed March 31, 2015, [http://www.nytimes.com/2011/11/09/nyregion/at-occupy-wall-street-protest-rising-concern-about-crime.html?\\_r=0](http://www.nytimes.com/2011/11/09/nyregion/at-occupy-wall-street-protest-rising-concern-about-crime.html?_r=0).

<sup>171</sup> Linette Lopez and Robert Johnson, “The Truth About Crime and Sexual Assault at Occupy Wall Street,” November 8, 2011, accessed March 31, 2015, <http://www.businessinsider.com/truth-about-crime-at-occupy-wall-street-2011-11>.

them feel unsafe, because some had mental disorders and were prone to violence. Facilitators complained that the homeless took energy away from the struggle by adding daily problems to camp life. One complained, “It’s bad for most of us who came here to build a movement. We didn’t come here to start a recovery institution.”<sup>172</sup>

### Removal of Protesters and Later History

Over time, New York City residents began to complain about the encampment. Complaints were generally directed at the noise from drum circles, barricades, and congested sidewalks.<sup>173</sup> In November, New York Mayor Michael Bloomberg decided to remove protesters from the park. The removal took place on November 15, 2011.<sup>174</sup> Despite the city’s action, roughly 20-30 activists continued to camp out on the sidewalk of Trinity Church, at the intersection of Wall Street and Broadway.<sup>175</sup> However, the movement appeared to have lost some of its focus with its removal from the symbolic hub.<sup>176</sup>

With the loss of the park, the movement tried to establish another encampment. On November 17, 2011, protesters attempted to occupy land owned by the Episcopal

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<sup>172</sup> Adam Nagourney, “Dissenting, or Seeking Shelter? Homeless Stake a Claim at Protests,” *The New York Times*, October 31, 2011, accessed March 31, 2015, <http://www.nytimes.com/2011/11/01/us/dissenting-or-seeking-shelter-homeless-stake-a-claim-at-protests.html?ref=nyregion>.

<sup>173</sup> Buckley, “Occupy Wall Street Protest Reaches a Crossroads.”

<sup>174</sup> Binelli, “The Battle for the Soul of Occupy Wall Street.”

<sup>175</sup> Saki Knafo, “Occupy Wall Street: What Happened?,” *The Huffington Post*, October 11, 2012, accessed March 31, 2015, [http://www.huffingtonpost.com/2012/09/10/occupy-wall-street\\_n\\_1871661.html](http://www.huffingtonpost.com/2012/09/10/occupy-wall-street_n_1871661.html).

<sup>176</sup> Binelli, “The Battle for the Soul of Occupy Wall Street.”

Church near Canal Street and Avenue of the Americas, roughly a mile from original encampment.<sup>177</sup> On 17 March, both Saint Patrick's Day and the six-month anniversary of the occupation's start, protesters attempted to re-occupy Zuccotti Park.<sup>178</sup> A second attempt to re-occupy Zuccotti Park occurred on September 17, 2012, the one year anniversary of the start of the movement.<sup>179</sup> In all of these instances, police were able to quickly remove protesters. On May 1, 2012, the Occupy Movement attempted to organize a general strike across the United States. However, labor unions did not support the idea and workers did not go on strike.<sup>180</sup>

#### Success or Failure of the Occupy Wall Street Movement

The occupy movement lacked *stated* goals. In order to qualify as a success within the parameters of this study, a movement must achieve the goals it messaged to the public while still active. An unsuccessful nonviolent campaign is one that fails to achieve its objectives while still active, unless the original stated goal was simply to "raise

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<sup>177</sup> Al Baker and Colin Moynihan, "Arrests as Occupy Protest Turns to Church," *The New York Times*, December 17, 2011, accessed March 31, 2015, [http://www.nytimes.com/2011/12/18/nyregion/occupy-wall-street-protesters-march-against-trinity-church.html?\\_r=0](http://www.nytimes.com/2011/12/18/nyregion/occupy-wall-street-protesters-march-against-trinity-church.html?_r=0).

<sup>178</sup> Colin Moynihan, "Scores Arrested as the Police Clear Zuccotti Park," *The New York Times*, March 17, 2012, accessed March 31, 2015, <http://cityroom.blogs.nytimes.com/2012/03/17/arrests-made-as-protesters-mark-occupy-wall-streets-six-month-anniversary/>.

<sup>179</sup> Megab Barr, "1 Year After Encampment Began, Occupy in Disarray," *The Seattle Times*, reprinted from The Associated Press, September 17, 2012, accessed March 31, 2015, [http://web.archive.org/web/20140224024555/http://seattletimes.com/html/nationworld/2019179284\\_apusoccupyanniversary.html](http://web.archive.org/web/20140224024555/http://seattletimes.com/html/nationworld/2019179284_apusoccupyanniversary.html).

<sup>180</sup> Binelli, "The Battle for the Soul of Occupy Wall Street."

awareness” of an issue. It is difficult to judge the success or failure of Occupy Wall Street on the basis of its goals because the movement’s goals are difficult to determine.

### Success in a Movement without Demands

The “Declaration of the Occupation of New York City” contained no demands, only 22 complaints, with the caveat that the list of complaints was not all inclusive.<sup>181</sup> The reason the movement lacked demands was that its goals went beyond a set of demands to the reform of the United States’ political and economic system. The movement’s true goals were to completely overturn the existing system. In a letter to *Al-Jazeera*, David Graeber explained why the Occupy Wall Street Movement lacked demands.<sup>182</sup> While movement’s lack of demands and its unwillingness to engage in the traditional political process can be explained by Graeber’s letter, the letter itself did not come from the General Assembly. It therefore did not represent an official message to the public, but it was the best available explanation of the movement’s goals and reasons for its actions.

According to Graeber, the movement’s true goal was to radically change society and the governmental system. Graeber felt that American society could be changed to mimic the societies that existed within the occupied spaces. The United States government would be replaced with a system based on direct democracy and group consensus, all organized around the anarchist principles of mutual aid and “self

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<sup>181</sup> Occupy Wall Street, accessed March 31, 2015, <http://occupywallstreet.net/learn>.

<sup>182</sup> Graeber, “Occupy Wall Street’s Anarchist Roots.”

organization.” The role of the occupation was to provide an example of how an anarchist society could work, leading to the transformation of American society and government.

Under these principles, making demands would be an appeal to change to the very political and economic institutions they hoped to overturn. This would legitimize the political and economic institutions, thus making it harder to destroy them.<sup>183</sup> As the United States government remains in power and society has not radically changed to resemble the example provided by the Occupy Movement, it is clear that the Occupy Wall Street Movement failed to achieve the anarchists’ goals.

#### Other Possible Goals

As the movement included participants with a variety of political views,<sup>184</sup> it can be assumed that while anarchist “facilitators” were able to push the movement towards a goal of destroying the system, there were some members of the movement who wanted simply to change the system. Lasn and White’s draft manifesto, for example, proposed a tax on all financial transactions, a tightening of financial regulations, a ban on certain types of high frequency trading, and the passage of laws that would repeal corporate personhood.<sup>185</sup> However, none of these goals were achieved. Even the tightening of financial regulations cannot be claimed as a success because the Dodd-Franks Financial

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<sup>183</sup> Ibid.

<sup>184</sup> Schwartz, “Pre-Occupied.”

<sup>185</sup> William Yardley, “The Branding of the Occupy Movement,” *The New York Times*, November 27, 2011, accessed March 31, 2015, <http://www.nytimes.com/2011/11/28/business/media/the-branding-of-the-occupy-movement.html>.

Reform Act was signed into law on July 21, 2010, more than a year *before* the occupation started.<sup>186</sup>

### Branding Efforts of the Occupy Wall Street Movement

The Occupy Wall Street movement lacked an effective governing body and was philosophically against centralized control. Both the General Assembly and the “Spokes-Council” took long periods of time to make even simple decisions.<sup>187</sup> The founders of the movement also refused to give policy guidance after it began.<sup>188</sup> This meant that most of the branding efforts, both message and organizational, were left up to individual protesters and their supporters. Likewise, message and organizational branding enforcement also were left to individual protesters without significant guidance from the governing bodies.

### Difficulties of Branding for the Occupy Wall Street Movement

Branding the Occupy Wall Street movement presented special challenges. The horizontal structure of the movement made branding difficult because there were no leaders who could select and enforce branding efforts. The decision-making process was slow, and the inclusive nature of the movement brought in people who had different goals or discredited the movement. Despite these problems, the movement did manage to

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<sup>186</sup> William Sweet, “Dodd-Frank Act Becomes Law,” Harvard Law School Forum on Corporate Governance and Financial Regulation, July 21 2010, accessed March 31, 2015, <http://blogs.law.harvard.edu/corpgov/2010/07/21/dodd-frank-act-becomes-law/>

<sup>187</sup> Schwartz, “Pre-Occupied.”

<sup>188</sup> Yardley, “The Branding of the Occupy Movement.”

conduct some message and organizational branding as well as organizational branding enforcement.

Without any clear leaders or effective decision-making process, planning, coordination, and control proved difficult. The General Assembly required 90 percent of participants to agree to a decision and the entire process could be held up by a single member. Part of the problem was that a large number of the participants at the General Assembly wanted to speak. This could be explained by a study published in *Psychological Science*, which compared liberals and conservatives.<sup>189</sup> It found that while conservatives are more likely to overestimate their similarities with others, liberals tend to overestimate their differences and have a stronger desire to feel unique. This could be used to explain how the General Assembly failed to work. Every time a decision needed to be made, a large number of participants felt the need to speak and contrast their views with others. This meant that the debate over simple issues, like purchasing coffee, could take hours.<sup>190</sup>

The movement also contained a large number of protesters with different and sometimes divergent agendas. Several Episcopal ministers joined in the protest in the hope of promoting social justice issues.<sup>191</sup> Others wanted further reforms made to the

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<sup>189</sup> Chadly Stern, Tessa V. West, and Peter G. Schmitt, “The Liberal Illusion of Uniqueness,” *Psychological Science*, accepted July 17, 2013, accessed March 31, 2015, <http://pss.sagepub.com/content/25/1/137.long>.

<sup>190</sup> Buckley, “Occupy Wall Street Protest Reaches a Crossroads.”

<sup>191</sup> Sharon Sheridan, “Clergy, Laity Support Nonviolent Protests at Occupy Wall Street,” The Episcopal Church website, October 25, 2011, accessed March 31, 2015, <http://www.episcopalchurch.org/library/article/clergy-laity-support-nonviolent-protests-occupy-wall-street>.

financial system. Anarchists and communists also were represented.<sup>192</sup> Finally, the homeless came looking for a free meal and a place to sleep.<sup>193</sup> Attempting to find common ground among these disparate groups would have been difficult under any circumstances.

The inclusive nature of the movement also made branding the movement difficult because it allowed in protesters who discredited the movement. Protesters who used drugs, engaged in violence, or made statements or carried signs that were offensive discredited the movement as a whole. The inclusion of the homeless also discredited the protesters because they often used drugs, drank, or had mental health problems.<sup>194</sup>

#### Messaging, Message Branding, and Message Branding Enforcement

The limited actions of the General Assembly and “Spokes-Council,” - issuing the “Declaration of Occupation,” statements in support of other occupy movements, and refusing to issue demands-constitute no evidence of a deliberate effort to brand the organization’s messages. As a result, messaging and message branding enforcement were left up to individual protesters. An example of the latter was noted when one protester tore down a sign carried by a fellow protester stating “Google=Jewish Billionaires.”<sup>195</sup>

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<sup>192</sup> Schwartz, “Pre-Occupied.”

<sup>193</sup> Nagourney, “Dissenting, or Seeking Shelter? Homeless Stake a Claim at Protests.”

<sup>194</sup> Ibid.

<sup>195</sup> Sorkin, “Occupy Wall Street: A Frenzy That Fizzled.”

Other than the lack of clear goals, one of the biggest problems for message branding was that individual protesters occasionally disrupted the messaging effort with either confusing or offensive messages. Confusing messages like “The State Kills Faggots, Execute the State,”<sup>196</sup> “Alligator Fuck Housed Me,”<sup>197</sup> or “Cartwheels for Justice”<sup>198</sup> at best confused the target audiences and made the entire organization look juvenile. Offensive messages such as “Fuck the Police” likely turned the target audiences against them.<sup>199</sup> These messages likely negated the limited efforts at coordinating messaging.

The movement used mainly protester-centric messaging to communicate with target audiences. Examples included protest signs, social media, and the use of participatory media such as CNN’s iReports. With protest signs and social media, messaging used repetitive slogans and images. These messaging systems relied on people quickly forming loose connections. However, these systems were only good for transmitting short slogans or sound bites. Due to the size limits on messages, they were bad for communicating well thought-out, reasoned discussions.<sup>200</sup>

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<sup>196</sup> Binelli, “The Battle for the Soul of Occupy Wall Street.”

<sup>197</sup> Jeff Sharlet, “Inside Occupy Wall Street,” *Rolling Stone*, November 10, 2011, accessed March 31, 2015, <http://www.rollingstone.com/politics/news/occupy-wall-street-welcome-to-the-occupation-20111110>.

<sup>198</sup> John Cassidy, “Wall Street Protests: Signs of the Times,” *The New Yorker*, October 6, 2011, accessed March 31, 2015, <http://www.newyorker.com/news/john-cassidy/wall-street-protests-signs-of-the-times>.

<sup>199</sup> Ibid.

<sup>200</sup> Schwartz, “Pre-Occupied.”

The movement did enjoy some messaging success through the use of participatory media. Examples can be seen in CNN's iReports posted by protesters or their supporters. By using CNN's system, protesters managed to send messages to the public through a respected news organization, and as a result gain a wider audience and legitimacy. The iReports, whose voracity later reports would prove questionable, accused the police of brutality,<sup>201</sup> bulldozing tents without checking if they were occupied,<sup>202</sup> and clearing Zuccotti Park despite a judge's ruling that the eviction was illegal.<sup>203</sup> With this messaging, they were able to define the image of the New York City Police, and by extension the political establishment as brutal and lawless. Mainstream media employing professional reporters, including CNN's traditional reporting,<sup>204</sup> tended to report more objectively, but the protesters were still able to reach the public by co-opting a respected news source.

### Organizational Branding

While there was an overall lack of central planning or direction, a group of protesters worked as media volunteers and attempted to project a positive image of the

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<sup>201</sup> Gene Taylor, "Eviction of Liberty Plaza/Zuccotti Park, NYC," *CNN iReport*, November 17, 2011, accessed March 31, 2015, <http://ireport.cnn.com/docs/DOC-705438>.

<sup>202</sup> Gene Taylor, "Occupy Wall Street Protests 24SEP11," *CNN iReport*, September 25, 2011, accessed March 31, 2015, <http://ireport.cnn.com/docs/DOC-678651>.

<sup>203</sup> Gene Taylor, "Eviction of Liberty Park," *CNN iReport*, accessed March 31, 2015, <http://ireport.cnn.com/docs/DOC-704968>. NOTE: Despite their inaccuracy, as of the publishing of this thesis, all of Taylor's iReports remain on the CNN iReport page.

<sup>204</sup> CNN, "New York Court Upholds Eviction of Occupy Protesters," November 16, 2011, accessed March 31, 2015, <http://www.cnn.com/2011/11/15/us/new-york-occupy-eviction/>.

movement.<sup>205</sup> Most of the work was done through courting the media. While police who entered Zuccotti Park were hounded by protesters with cameras, who referred to themselves as “Coparazzi,”<sup>206</sup> reporters were generally welcomed. Individual protesters, apparently on their own initiative, showed reporters parts of the protest camp that would increase the likelihood of positive news stories.

Examples of media stories resulting from the protesters’ media outreach were reports that highlighted the protesters’ library and communal kitchen. *The New York Times* reported on the kitchens that were feeding the protesters and how they were receiving support from around the world. It described how the protesters, as a matter of policy, fed everyone who arrived, as well as the cooperative nature of the kitchen work.<sup>207</sup> Another report described the “People’s Library,” which housed 5,000 books, was operated by volunteers, and received support from several area libraries.<sup>208</sup> These stories, and similar ones in other news sources, portrayed the protesters as responsible and focused on creating a better community.

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<sup>205</sup> David Bauder, “Occupy Wall Street, Media Have Complicated Relationship,” *The Huffington Post*, December 20, 2011, accessed March 31, 2015, [http://www.huffingtonpost.com/2011/10/20/occupy-wall-street-media-relationship\\_n\\_1021530.html](http://www.huffingtonpost.com/2011/10/20/occupy-wall-street-media-relationship_n_1021530.html).

<sup>206</sup> Buckley, “Occupy Wall Street Protest Reaches a Crossroads.”

<sup>207</sup> Jeff Gordiner, “Want to Get Fat at Wall Street? Try Protesting,” *The New York Times*, October 11, 2011, accessed March 31, 2015, <http://www.nytimes.com/2011/10/12/dining/protesters-at-occupy-wall-street-eat-well.html?>.

<sup>208</sup> Christian Zabriskie, “A Library Occupies the Heart of the Occupy Movement,” *American Libraries*, October 18, 2011, accessed March 31, 2015, <http://www.americanlibrariesmagazine.org/article/library-occupies-heart-occupy-movement>.

News reports also highlighted the counterculture image of the movement. Reports described unending drum circles, the occasional nudity at Zuccotti Park<sup>209</sup> and local residents' complaints about the noise and their sense of being under siege by the movement.<sup>210</sup> One commentator later described how the counterculture image may have alienated Americans from the movement.<sup>211</sup> This researcher found no evidence that at any point protesters attempted to re-brand the movement away from its counter-culture image to an image more palatable to average Americans.

### Organizational Branding Enforcement

In early November 2011, the media began to report about crime within the camp.<sup>212</sup> The movement was portrayed as dangerous, with reports of sexual assaults against women and drug use. One of the factors leading to lawlessness was the scarcity of police in the park during the occupation.<sup>213</sup> To improve safety and counter the negative publicity, protesters banded together and formed a neighborhood watch system. The

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<sup>209</sup> Sharlet, "Inside Occupy Wall Street."

<sup>210</sup> Peter Fedynsky, "Occupy Wall Street Neighbors: 'We're Under Siege'," *Voice of America*, October 12, 2011, accessed March 31, 2015, <http://www.voanews.com/content/article--occupy-wall-street-neighbors-were-under-siege--131832153/146613.html>.

<sup>211</sup> Doug Mataconis, "One Year Later, The Failure of Occupy Wall Street is Apparent," *Outside the Beltway*, September 17, 2012, accessed March 31, 2015, <http://www.outsidethebeltway.com/one-year-later-the-failure-of-occupy-wall-street-is-apparent/>.

<sup>212</sup> Linette Lopez and Robert Johnson, "The Truth About Crime and Sexual Assault at Occupy Wall Street," *Business Insider*, November 8, 2011, accessed March 31, 2015, <http://www.businessinsider.com/truth-about-crime-at-occupy-wall-street-2011-11>.

<sup>213</sup> Buckley, "At Scene of Wall St. Protest, Rising Concerns About Crime."

system was based around teams whose mission was to either de-escalate dangerous situations or physically expel violent people from the park. While the initial media reporting about crime within the park was not positive towards the movement, subsequent reporting about the protest's security teams was favorable. Security teams were described as unconventional (they would surround violent people and all shout "om" in unison), but effective.<sup>214</sup> These stories portrayed protesters as responsible and genuinely concerned with creating a better world.<sup>215</sup>

However, the Occupy Wall Street movement was unable to stop protesters from engaging in acts of violence, especially outside of Zuccotti Park. Most of the reported violence came from the "black bloc," a group of protesters who dressed entirely in black and covered their faces with bandanas. While individual protesters on occasion intervened and stopped others from engaging in violence, overall the organization did not attempt to prevent violence or expel groups that engaged in violence. In fact, when the Occupy Oakland movement did not commit itself to nonviolent methods, the Occupy Wall Street movement refused to condemn the resulting violent attacks. Rioting was referred to as a "diversity of tactics."<sup>216</sup>

On May Day (1 May) 2012, black bloc protesters clashed with New York City police and then ran through the Lower East Side overturning trash cans and dragging police barriers into the streets.<sup>217</sup> Protesters also attacked several members of the

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<sup>214</sup> Ibid.

<sup>215</sup> Sharlet, "Inside Occupy Wall Street."

<sup>216</sup> Binelli, "The Battle for the Soul of Occupy Wall Street."

<sup>217</sup> Ibid.

media.<sup>218</sup> The attacks on reporters were particularly counterproductive, given that nonviolent mass movements are in essence information warfare campaigns that attempt to influence key audiences. The media reports about the May Day protests portrayed the protesters as violent and juvenile and helped discredit the organization.

### Results of Branding: Popularity over Time

Initially, the movement was able to take advantage of the general anger against financial institutions that followed the recession and the bailout. According to Gallop Polls, the public trust in banks was at an all-time low. In 2011, only 23 percent of respondents claimed they had a lot or a great deal of confidence in banks.<sup>219</sup> Likely based on this negative opinion of the financial industry, the Occupy Wall Street movement enjoyed initially popularity. A *Time* Magazine poll conducted from October 9-10, 2011 found that 54 percent of respondents were either “very favorable” or “somewhat favorable,” compared to 23 percent who had a “somewhat unfavorable” or “very unfavorable” opinion of the movement.<sup>220</sup> The initial popularity can also be seen in *Time* Magazine’s choice of “the protester” as its 2012 person of the year. The accompanying

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<sup>218</sup> Carly Baldwin, “Black Bloc Occupy Protesters Attack Media, Photographers During May Day Rally,” *Metro*, December 31, 2014, accessed March 31, 2015, <http://www.metro.us/local/black-bloc-occupy-protesters-attack-media-photographers-during-may-day-rally/tmWlea---e2ifJ0EBubv2k/>.

<sup>219</sup> Gallop Inc., “Confidence in Institutions,” accessed March 31, 2015, <http://www.gallup.com/poll/1597/confidence-institutions.aspx>.

<sup>220</sup> *Time*, “Topline Results of Oct. 9-10, 2011,” accessed March 31, 2015, <http://swampland.time.com/full-results-of-oct-9-10-2011-time-poll/>.

article discussed not only the Arab Spring protests but the Occupy Wall Street movement as well.<sup>221</sup>

### Views Over Time

Gallup polls later showed a decline, although not a dramatic one, in the movement's popularity. In polls taken October 15-16, 2011 and November 19-20, 2011, Americans' opposition to the methods used by Occupy Wall Street rose from 20 percent disapproving to 31 percent disapproving. Support for the methods used dropped from 25 percent to 20 percent.<sup>222</sup>

Unfortunately, for this analysis, after 2011 few polls asked respondents for opinions of the Occupy Wall Street movement, so tracking its popularity over time is difficult. But even with a limited number of polls, a downward trend in approval for the Occupy Wall Street Movement was apparent. A series of polls conducted by NBC and the *Wall Street Journal* showed that support for the protests dropped from 29 percent in November 2011 to 16 percent in May 2012.<sup>223</sup> In a YouGov survey of 1000 adults conducted from September 12-13, 2013, 26 percent of respondents said they "strongly

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<sup>221</sup> Kurt Andersen, "The Protester," *Time Magazine*, December 14, 2011, accessed March 31, 2015, [http://content.time.com/time/specials/packages/article/0,28804,2101745\\_2102132\\_2102373-5,00.html](http://content.time.com/time/specials/packages/article/0,28804,2101745_2102132_2102373-5,00.html).

<sup>222</sup> Lydia Saad, "Support for 'Occupy' Unchanged, but More Criticize Approach," Gallup Inc., November 21, 2011, accessed March 31, 2015, <http://www.gallup.com/poll/150896/support-occupy-unchanged-criticize-approach.aspx>.

<sup>223</sup> NBC News/Wall Street Journal, "Do you consider yourself a supporter of the Occupy Wall Street Movement?" accessed March 31, 2015, <http://www.pollingreport.com/politics.htm>.

support” or “somewhat support” the goals of the movement.<sup>224</sup> This showed a considerable decline from an October 2011 poll showing that 43 percent of respondents supported the goals of the movement.<sup>225</sup> See figure 1 for a graphic representation of the public’s support for Occupy Wall Street over time.

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<sup>224</sup> YouGov, “Poll Results: Impact of OWS,” September 12-13, 2013, accessed March 31, 2015, <https://today.yougov.com/news/2013/09/17/poll-results-impact-ows/>.

<sup>225</sup> Yougov, “Main Street Sees Occupy Wall Street Favorably-OWS Fares Better Than the Tea Party,” October 27, 2011, accessed March 31, 2015, <https://today.yougov.com/news/2011/10/27/main-street-sees-occupy-wall-street-favorably-ows-/>.

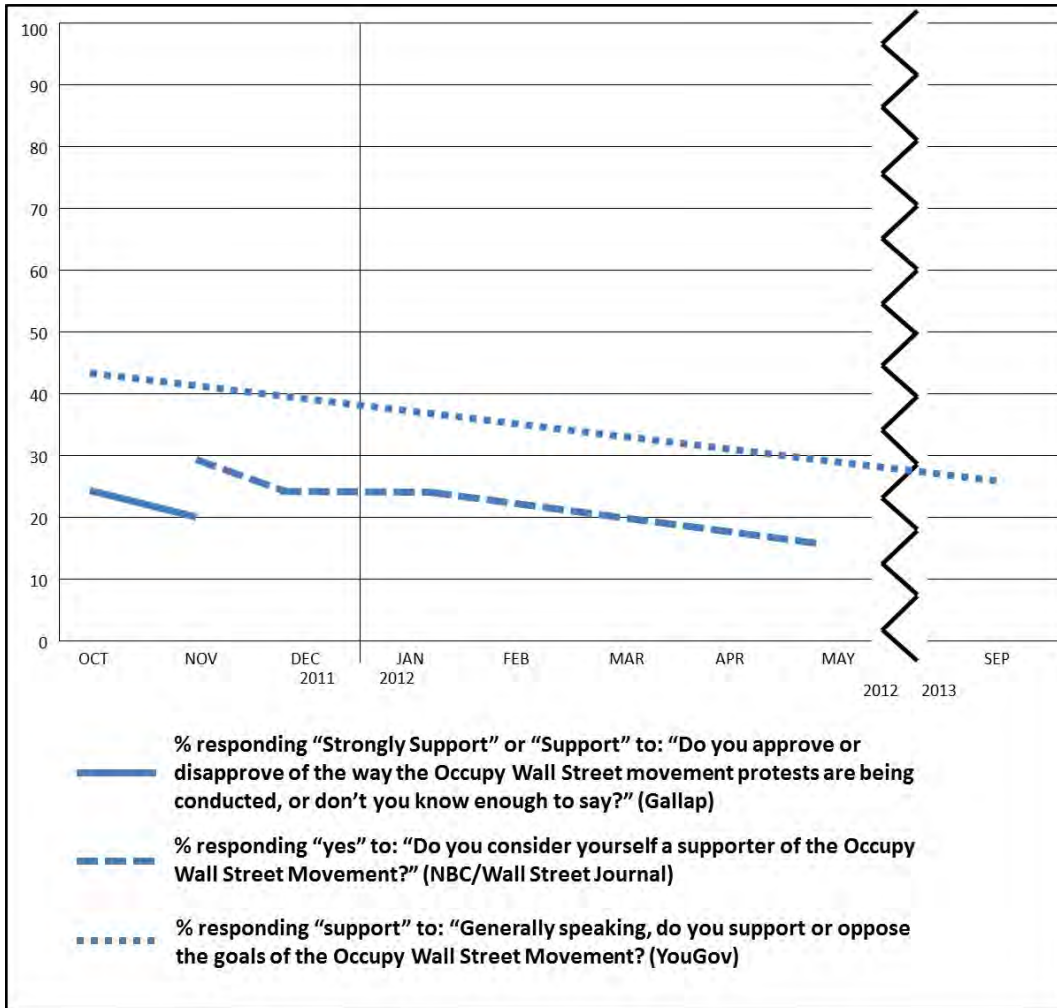


Figure 1. Support for Occupy Wall Street over time

Source: Yougov, “Main Street Sees Occupy Wall Street Favorably-OWS Fares Better Than the Tea Party.” October 27, 2011, accessed March 31, 2015, <https://today.yougov.com/news/2011/10/27/main-street-sees-occupy-wall-street-favorably-ows-/>; NBC News/Wall Street Journal, “Do you consider yourself a supporter of the Occupy Wall Street Movement,” accessed March 31, 2015, <http://www.pollingreport.com/politics.htm>; YouGov Survey, “Poll Results: Impact of OWS,” September 12-13, 2013, accessed March 31, 2015, <https://today.yougov.com/news/2013/09/17/poll-results-impact-ows/>.

## Likely Reasons for a Decline in Popularity

When it began, the Occupy Wall Street Movement benefited from popular resentment against corporations and the financial system. Average Americans generally supported the movement because they agreed that Wall Street was corrupt. However, over time they became alienated from the Occupy Wall Street movement. Why was this so?

A number of observers have offered explanations for the Occupy Wall Street movement's decline in popularity. Steve Kornacki wrote in a column for *Salon* that Americans likely turned away from the movement after it failed to distance itself from the actions of its more disreputable followers.<sup>226</sup> Andrew Ross Sorkin wrote in a piece for *The New York Times* that the while the movement may have been started by a few passionate intellectuals, it was hijacked by misfits and vagabonds.<sup>227</sup> Andy Ostrow, writing for *The Huffington Post*, claimed that the occupiers did not look like committed protesters and that the park looked more like a Bonnaroo (an annual music- arts festival and campout) than a protest. He also noted that successful movements are not just a bunch of people camping out, sharing books, and joining drum circles.<sup>228</sup> According to Doug Mataconis, the counterculture image of the movement as well as the strangeness of

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<sup>226</sup> Steve Kornacki, "Is OWS in Danger of Losing Middle America?," *Salon*, November 3, 2011, accessed March 31, 2015, [http://www.salon.com/2011/11/03/is\\_ows\\_in\\_danger\\_of\\_losing\\_middle\\_america/](http://www.salon.com/2011/11/03/is_ows_in_danger_of_losing_middle_america/).

<sup>227</sup> Andrew Ross Sorkin, "Occupy Wall Street: A Frenzy That Fizzled," *New York Times*, September 17, 2012, accessed March 31, 2015, [http://dealbook.nytimes.com/2012/09/17/occupy-wall-street-a-frenzy-that-fizzled/?\\_php=true&\\_type=blogs&\\_r=0](http://dealbook.nytimes.com/2012/09/17/occupy-wall-street-a-frenzy-that-fizzled/?_php=true&_type=blogs&_r=0).

<sup>228</sup> Andy Ostrow, "The Failure of Occupy Wall Street," *The Huffington Post*, May 31, 2012, accessed March 31, 2015, [http://www.huffingtonpost.com/andy-ostrow/the-failure-of-occupy-wal\\_b\\_1558787.html](http://www.huffingtonpost.com/andy-ostrow/the-failure-of-occupy-wal_b_1558787.html).

the movement's decision-making processes and the incoherence of its agenda alienated average Americans.<sup>229</sup>

All these reasons for the Occupy Wall Street movement's decline in popularity can be traced to a single point: the movement failed to properly brand itself. As a result, it alienated average Americans. Despite initial anger at the financial system and support for reform, the public came to see the occupiers as a group of strange, juvenile, and irresponsible misfits instead of committed activists. The movement's campsite came to be seen more like a strange festival than a political organization. With this unintended branding, both the movement and its message lost legitimacy in the eyes of average Americans, as was documented in the aforementioned commentary and polling data.

According to *The Dynamics of Persuasion*, an organization (or in this case a movement) must establish credibility with its target audience. Gaining and maintaining the image of credibility is key to effective branding, which leads target audiences to support the movement. Organizations do this by establishing their likability, their similarity to target audiences, and their physical attractiveness.<sup>230</sup> The American public as a whole was likely the movement's target audience. This wide target audience was necessary because to be successful, the movement needed to convince a significant portion of Americans to drop out of the established political and economic system and join the protests. With a significant portion of Americans no longer participating in economic activities or politics, the movement would have come closer to its goal of

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<sup>229</sup> Mataconis, "One Year Later, The Failure of Occupy Wall Street is Apparent."

<sup>230</sup> Richard M. Perloff, *The Dynamics of Persuasion* (New York, NY: Routledge, 2014), 250-253.

governmental change. The movement's motto, "we are the 99%" embodied the desire to draw in large numbers of Americans.

The movement's likability was high at first, owing to popular rage against the financial institutions they were protesting against. However, offensive signs, obnoxious tactics, and reports of crime likely reduced their likability. The message "we are the 99%," in addition to suggesting the goal of solidarity, was good because it immediately established a connection with average Americans, who were angry at the perceived actions of financial elites, the "1%." However, over time the strangeness of the movement, with its constant drum circles and counterculture image, likely made the movement seem alien to most Americans. Given the youth of many of the protesters, establishing the movement's physical attractiveness could have been easily accomplished. However, the unkempt appearance of protesters, especially those who lived at the park, likely worked against them.

#### Reasons for Failure

The movement's failure was likely the result of an inability to properly brand itself, which in turn can be traced back to its leadership. The leaders of the movement, instead of guiding it, attempted just to facilitate the process. The decision-making bodies that could have provided the movement's leadership were unable or unwilling to fulfil the role. Without a body capable of planning, coordinating, and controlling the movement, it could not effectively plan or execute its operations, let alone direct or enforce branding by controlling messaging or the actions of its members. The movement needed to increase its popularity amongst its target audience to be successful, whatever its goals were. However, due to poor branding, the key target audience (average Americans)

became alienated and the movement lost its popularity. When it lost its popularity, it simply withered away from lack of support.

### What Might Have Led to Success?

Had the Occupy Wall Street movement been able to brand itself to the American public as representing a viable alternative to a failing political and economic system, the movement could have drawn in more members or supporters and might have been partially successful. The movement could have maintained its likability by banning offensive signs and behavior and expelling those who did not obey the rules. The movement could have maintained its perception of similarity to the target audience by trying to make the protesters look outwardly more like average Americans. This would have meant an end to the movement's counterculture image, however. Enforcing grooming standards and a dress code would have established the physical attractiveness of the movement. While the anarchists' goals of replacing the US government and ending capitalism would likely not have occurred, some of Lasn and White's proposed goals of financial and regulatory reforms might have been enacted through the established political process due to support from voters.

## CHAPTER 6

### CONCLUSIONS

The goal of this study was to determine the effect of branding and brand enforcement on nonviolent mass movements' success or failure. It also sought to determine the methods movements use to brand their organizations and messages, and the techniques they used to manage their branding. From the case studies, it is clear that branding was one of the principle reasons why the Montgomery Bus Boycott succeeded and the Occupy Wall Street movement failed. However, from the case studies of these two movements alone it is impossible to establish with confidence a causal relationship between the success or failure of movements and their branding.

#### Reasons for the Success of the Montgomery Bus Boycott

In the Montgomery Bus Boycott, leaders established a brand image based on respectability, nonviolence, and the righteousness of their cause. Respectability likely appealed to the African American middle class and made them willing to provide money and loan their vehicles to the movement. An example of the success of this branding can be seen in the fact that the middle class African American community was initially opposed to any civil rights campaign; however, with leadership from respectable community leaders, it actively supported the movement.<sup>231</sup> When Martin Luther King, Jr. asked car owners (generally middle class) to loan their vehicles to the movement to

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<sup>231</sup> King, *Stride Towards Freedom*, 22.

transport boycotters to their jobs, 150 cars were immediately pledged.<sup>232</sup> Had the middle class African American community not provided support, many working class African Americans, who made up the majority of the boycotters, would have had to go back to the busses to get to their jobs, significantly reducing the participation in the boycott. Thus, establishing a respectable image for the movement was a key element of success.

For the boycotters, mostly working class African Americans, the righteousness of the cause was likely most appealing. The reason was that by participating in the boycott, they were opposing a repressive system that humiliated them on a daily basis. Working class African Americans would have also found the respectability aspect of the movement's branding attractive. By participating in a such a movement, they were able to gain the respect in the community that they would not have had before. An example of this can be seen when Virginia Durr, a white supporter of the movement, offered a ride to several women who were walking to their jobs in the rain and was refused.<sup>233</sup> The women likely felt that walking, despite the rain, was the respectable thing to do and no matter how tired or wet they were, they refused to stop. This also would have given them the drive needed to continue the boycott for over a year. Martin Luther King, Jr. and the other leaders practiced branding enforcement by continuously stressing the importance of nonviolence and respectability and kept them involved in the movement by stressing the righteousness of the cause. Keeping the working class African Americans involved in the movement was key to the success of the movement because they represented the majority of the boycotters, so without their participation, the movement would have failed.

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<sup>232</sup> Ibid., 61.

<sup>233</sup> Olson, *Freedom's Daughters*, 117.

The respectability and nonviolence portions of the branding likely appealed to middle class whites and made them less apt to fire their African American employees who were boycotting. This explains why the white community, which was overwhelmingly opposed to integration,<sup>234</sup> did not fire their employees, despite the demands of Tacky Gayle,<sup>235</sup> the mayor of Montgomery. In fact, in what Martin Luther King described as “tacit understandings-and sometimes mutually accepted misunderstandings,” boycotting was generally at least accepted (even if not supported) by white employers. Maids were often picked up and driven home by their employers, who remained opposed to integration. King recorded a conversation that took place between an employer and an elderly maid:

Her wealthy employer asked, ‘Isn’t this bus boycott terrible?’ The old lady responded:  
‘Yes, ma’am, it sure is. And I just told all my young ‘uns that this kind of thing is white folk’s business and we just stay off the busses till they get this whole thing settled.’<sup>236</sup>

In effect she told her employer she did not like the boycott, but would not ride the bus until the boycott was over. The movement’s brand image of respectability and nonviolence would have made it easier for whites to accept these sorts of answers and passively accept the boycott. This passive acceptance, despite ideological opposition, kept whites from firing their African American employees. Had working class African Americans been fired for boycotting, they would have been forced to abandon the boycott and the movement would have collapsed.

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<sup>234</sup> Ibid., 89.

<sup>235</sup> Ibid., 119-120.

<sup>236</sup> King, *Stride Towards Freedom*, 64-65.

The key to making middle class whites passively accept the boycott was brand enforcement, combined with the choice of Rosa Parks as the movement's icon. In weekly meetings King continuously stressed the need to maintain nonviolence and respectability. He took it further by also stressing the need for the participants in the boycott to love their oppressors. The brand enforcement efforts continued after the boycott ended, with pamphlets<sup>237</sup> and classes<sup>238</sup> to train former boycotters how to maintain respectability on the bus.

### Reasons for the failure of Occupy Wall Street

The Occupy Wall Street movement set out to replace the United States' political and economic system with an anarchist system,<sup>239</sup> or at least to introduce sweeping reforms to the existing system (the exact goals were never officially communicated).<sup>240</sup> The leaders, to the extent there were any, attempted to erode the power of the United States' political and economic system by offering Americans an alternative system. By drawing large numbers of people into the occupation, the movement leaders felt that the existing political and economic system would either collapse from lack of support, or be forced to implement reforms.

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<sup>237</sup> King Encyclopedia, "Integrated Bus Suggestions," accessed January 14, 2015, [http://mlk-kpp01.stanford.edu/index.php/encyclopedia/documentsentry/integrated\\_bus\\_suggestions/](http://mlk-kpp01.stanford.edu/index.php/encyclopedia/documentsentry/integrated_bus_suggestions/).

<sup>238</sup> King, *Stride Towards Freedom*, 156.

<sup>239</sup> Graeber, "Occupy Wall Street's Anarchist Roots."

<sup>240</sup> Occupy Wall Street, <http://occupywallstreet.net/learn>.

To be successful, the Occupy Wall Street movement had to convince Americans who were not involved in the protests to join. They needed to convince the American public that the current political-economic system was a failure, the Occupy Wall Street movement offered a better solution, and that joining the movement would be beneficial to society or fun. Without a large portion of the American public joining the occupation, the established political and economic system would not collapse or be forced to change, and the movement would fail.

The movement also relied upon gifts from supporters. These gifts included everything from food to money.<sup>241</sup> Without these gifts the occupiers would not have been able to fulfill their basic needs. If enough Americans were not convinced that the movement was capable of creating a better system, the support would have stopped and the movement would have failed because the protesters would have had to abandon the occupation.

When the Occupy movement started, most Americans were already distrustful of the existing political-economic system,<sup>242</sup> however, they still needed to be convinced that the system that the Occupy Wall Street movement wanted to establish was a viable alternative. As the campsite was supposed to be an example of a working alternative to the established system, building a brand image of responsibility and competence was key to attracting more members. When the movement failed to credibly brand itself,<sup>243</sup> the

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<sup>241</sup> Gordiner, “Want to Get Fat at Wall Street? Try Protesting.”

<sup>242</sup> Gallop Inc., “Confidence in Institutions,” accessed March 31, 2015, <http://www.gallup.com/poll/1597/confidence-institutions.aspx>.

<sup>243</sup> Ostroy, “The Failure of Occupy Wall Street.”

movement lost popularity.<sup>244</sup> With the loss of popularity and the improving economy, Americans were unwilling to abandon the traditional political-economic system and join the movement and the movement failed.

### Similarities Between Occupy Wall Street and the Montgomery Bus Boycott

In the two case studies, both nonviolent mass movements depended on the actions of large groups of people to reach their goals. Each of these groups had a specific role to play. The Montgomery Improvement Association had to get the middle class African American community to provide support, the working class African American community to boycott, and the middle class whites not to actively oppose the boycott. The Occupy Wall Street movement sought to convince Americans to withdraw from the established political/economic system and join in the occupation and convince others to provide resources. In order to convince target audiences to do their required tasks, they had to either influence or manage the target audiences' perceptions of the movements. Branding allowed the movements to exercise some control over their organization's perceptions. This control, when exercised correctly, gave target audiences a more positive perception of the movement and its message.

The power of branding has been evident in the advertising industry. The Pepsi Challenge study conducted in 2003 demonstrated the supremacy of successful branding by showing that the pleasure people experience from soda is based more on the soda's

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<sup>244</sup> Yougov, "Maine Street Sees Occupy Wall Street Favorably- OWS Fares Better Than the Tea Party."

branding than on its taste.<sup>245</sup> With this in mind, it would make sense that the perception of target audiences, as a precursor to actions, might have been more influenced by the branding of the aforementioned nonviolent mass movements than other factors. As people determine what actions to take based on perception, it can be assumed that branding is what determined the actions of the target audiences in both movements.

This is not to say that the Montgomery Bus Boycott and the Occupy Wall Street movements are that similar. In fact, a major difference between the movements was in the scale of their objectives. The Montgomery bus boycott was limited geographically in that it only set out to change policies in Montgomery, Alabama. The Occupy Wall Street movement, on the other hand, aimed to effect change across the entire United States. The Montgomery Bus Boycott was also limited in the scope of its goal, which was solely to change bus seating rules. The Occupy Wall Street movement, if the letter from David Graeber can be used to define the movement's goals, intended to overturn both the government and economic systems of the United States.<sup>246</sup>

#### Other Factors Affecting the Success or Failure of the Movements

It can be argued that the leadership techniques used in each movement played a large role in their success or failure, and the evidence presented in this study appears to support that assertion. The Montgomery Improvement Association possessed an Executive Committee that was capable of effective decision-making.<sup>247</sup> Participants in

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<sup>245</sup> Lone, "How the Brain Reveals Why We Buy."

<sup>246</sup> Graeber, "Occupy Wall Street's Anarchist Roots."

<sup>247</sup> King, *Stride Towards Freedom*, 60.

the movement, with the help of constant reinforcing messages from King and the other clergy, abided by the Executive Committee's decisions. The Occupy Wall Street movement possessed two nominal decision-making bodies, the General Assembly and the Spokes-Council, which both proved incapable of effective decision-making.<sup>248</sup> In addition, Occupy Wall Street's leadership, with some exceptions, was unable (or unwilling) to control the behavior of participants. In both movements, the leadership's ability to ensure effective branding was key. In the Montgomery Bus Boycott, leadership ensured quality branding through effective decision-making and brand enforcement, resulting in a successful movement. In the Occupy Wall Street movement, leadership failed to ensure proper branding, resulting in the movement's failure.

#### Centralized vs Decentralized Leadership in Success or Failure

While the Montgomery Bus Boycott was planned by E.D. Nixon and Jo Anne Robinson, and then was organized and led by a centralized body, the Occupy Wall Street movement lacked centralized organization from the start. The lack of centralized organization was by design. Its "facilitators" felt that a decentralized organization would better fit their goals and be more effective. They wanted to demonstrate, through the occupation, a working anarchist system. The debate over whether completely decentralized leadership can work (as anarchists claim) is beyond the scope of this paper. However, while decentralized leadership might be able to work at some point in the future, in the case of the Occupy movement it clearly did not. The problems, which affected branding, were likely a combination of dysfunctional leadership methods and an

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<sup>248</sup> Schwartz, "Pre-Occupied."

unwillingness to make and enforce rules, both of which prevented effective branding or brand enforcement.

### Role of Branding in the Success or Failure of Nonviolent Mass Movements

Given the limited scope of the research, a causal relationship between the success or failure of nonviolent mass movements, the dependent variable, and the effectiveness of movements' branding efforts, the independent variable, cannot be established with confidence. In order to draw stronger inferences about the relationship, study of other nonviolent mass movements is required. However, in both of the examples in this study, a strong case can be made that branding played a key role in the success or failure of the movements. In both cases, the movements had to appeal to target audiences to secure participation, support, or passive acceptance. Target audiences likely made their decisions about whether or not to join, support, or accept the movements on the basis of the movement's brand image.

Despite the differences in leadership, the key to success for both movements was the ability to influence the behavior or attitudes of key groups. The effect of each movement's information campaign to target audiences thus was critical for success. Had the Montgomery Bus Boycott's branding efforts failed to convince the African American middle class to support it, the African American working class to participate in it, and the white middle class to at least passively accept it, the movement would have failed. Alternatively, had the Occupy Wall Street movement, despite its unique leadership methods, been able to convince a large enough portion of the American public to join in the protests, it might have succeeded. Branding therefore can be characterized as a

necessary, but not sufficient, cause for the success or failure of nonviolent mass movements.

### Relevance of Research

Nonviolent mass movements can be categorized as large scale information campaigns targeted at changing the perceptions and behavior of key audiences, and focusing their efforts towards using nonviolent methods to attack selected targets. In the future, the United States government may have an opportunity to use a nonviolent mass movement to further national policy objectives, either by supporting an existing movement or creating one from scratch. Alternatively, the United States might find its national policies threatened by a nonviolent mass movement. Either way, understanding the importance of branding and methods that nonviolent mass movements use for branding and brand management will be a key to success, either to assist a movement to develop and maintain a positive brand image or to attack the public's perception of a movement.

### Recommendations for further research

Overall, while a good argument can be made for the importance of branding for the Montgomery Bus Boycott and Occupy Wall Street, these two cases may not be representative of all nonviolent mass movements; and therefore their findings cannot be generalized over a larger population of nonviolent mass movements. Further research on other nonviolent mass movements is needed. Some promising cases for study are the so-called Color Revolutions in the former Soviet Union, the Solidarity movement in Poland, the Arab Spring revolts, the Tea Party movement, the Umbrella Revolution in Hong

Kong, and the effect of social media on mass movements. The following questions could serve as a guide for the study of these cases:

1. How did the movements attempt to brand themselves and their message?
2. How did the movements enforce branding?
3. Were the movements' branding and brand enforcement efforts effective?
4. Did the success or failure of branding and brand enforcement efforts make any difference in the success or failure of the campaigns?

The Umbrella Revolution in Hong Kong might be especially important to study because on the surface it seemed to have effective branding, with the use of primarily nonviolent methods by respectable-looking students.<sup>249</sup> However, the movement's occupation of portions of Hong Kong ended without the movement achieving its goals. It would be worthwhile to try to determine the reasons for the failure. If the reasons for failure had nothing to do with branding, when taken in consideration with the other case studies, the argument could be made that while successful branding is critical in a nonviolent mass movement, it is not the only requirement for success. The proposition that branding is a necessary, but not sufficient, condition for success would be substantiated. Additional questions to the Umbrella Revolution case could be:

1. Did the branding of the movement work in the context of China?
  - a. Did mainland Chinese and Hong Kong residents identify with the students?

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<sup>249</sup> Lauren Hilgers, "Hong Kong's Umbrella Revolution isn't Over Yet: A Democracy Movement Ponders its Next Move," *The New York Times*, February 18, 2015, accessed May 2, 2015, <http://www.nytimes.com/2015/02/22/magazine/hong-kongs-umbrella-revolution-isnt-over-yet.html>.

- b. Did mainland Chinese and Hong Kong residents identify with the movement's goals?
2. Did the movement's branding reach the Mainland Chinese people?
  - a. Was the "Great Firewall of China" strong enough to prevent key audiences in Mainland China from being successfully targeted?<sup>250</sup>
  - b. Were the mainland Chinese simply uninterested in the complaints of their better off counterparts in Hong Kong?<sup>251</sup>
3. Will the Umbrella Revolution spring up again in Mainland China if or when the Chinese economy slows down?<sup>252</sup>
4. In the future, will the Communist Party's high profile anti-corruption campaigns and censorship be able to effectively placate or stifle future nonviolent mass movements?<sup>253</sup>

The Occupy Wall Street movement made use of social media such a Twitter and Facebook.<sup>254</sup> Initially, leaders assumed that mass movements would be able to use social

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<sup>250</sup> The Economist, "The Art of Concealment," April 6, 2013, accessed May 7, 2015, <http://www.economist.com/news/special-report/21574631-chinese-screening-online-material-abroad-becoming-ever-more-sophisticated>.

<sup>251</sup> Frank Langfitt, "On China's Mainland, A Less Charitable Take On Hong Kong's Protests," *National Public Radio*, October 6, 2014, accessed May 7, 2015, <http://www.npr.org/blogs/parallels/2014/10/06/354088313/on-chinas-mainland-a-less-charitable-take-on-hong-kongs-protests>.

<sup>252</sup> David Lague, James Pomfret, and Greg Torode, "Special Report: In 'Umbrella Revolution,' China confronts limits of its power," *Reuters*, October 1, 2014, accessed May 7, 2015, <http://www.reuters.com/article/2014/10/01/us-hongkong-china-specialreport-idUSKCN0HQ4ZA20141001>.

<sup>253</sup> The Economist, "Chairman of Everything," July 5, 2014, accessed May 7, 2015, <http://www.economist.com/news/china/21606318-xi-jinping-consolidates-his-power-and-officials-are-quaking-their-boots-chairman-everything>.

media to their advantage. However, the Occupy Wall Street movement failed despite its use of social media and the Montgomery Bus Boycott succeeded despite the fact social media had not been invented. Questions for research about the role of social media in nonviolent mass movements could be:

1. Can social media enable nonviolent mass movements to effectively communicate with their target audiences better than traditional methods?
2. How can messages distributed via social media, which tend to be more participatory than traditional media, be controlled through message branding and brand enforcement by the movement's leadership?
3. What are the effects on the nonviolent mass movements of uncontrolled messaging?

As was evident in, for example, the fall of communist regimes in Eastern Europe and the upheavals of the Arab Spring, nonviolent mass movements can constitute a potent tool for popularly driven social and political change. An understanding of the variables that produce success or failure of these movements is therefore of interest to both the academic and policy communities. This thesis has sought to analyze one variable that shows promise in explaining the outcome of nonviolent mass movements – branding. The results of this research are encouraging, but they do not represent the final word on the topic. The conversation on this important topic has been joined and it remains for additional research efforts to carry it forward.

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<sup>254</sup> Craig Kanalley, "Occupy Wall Street: Social Media's Role in Social Change," *The Huffington Post*, June 12, 2011, accessed 24 May 2015, [http://www.huffingtonpost.com/2011/10/06/occupy-wall-street-social-media\\_n\\_999178.html](http://www.huffingtonpost.com/2011/10/06/occupy-wall-street-social-media_n_999178.html).

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