

INVENTING • SOLUTIONS • TOGETHER

CAMPAIGN TARGETING



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TARGETING

Introduction – What is “Targeting”?

“Targeting” refers to the political science part of putting together a campaign. It is based on the idea that different voter groups behave differently and should not be treated in a “one size fits all” fashion by the campaign. The goal of a campaign organizer is to maximize scarce resources by focusing efforts on groups of voters “targeted” for specific messages by their past behavior or by their declared position on your issue.

- **Likelihood of voting:** It is a sad but true fact that not all eligible voters are registered to vote, and not all who are registered will vote. In November of a presidential election year, as many as 80% or more of registered voters will make it to the polls, by far the largest group of voters in the four-year cycle. Other elections, especially odd-numbered years and primary elections, are characterized by much lower voter turnout. By making sure that the voter file you purchase from the Board of Elections contains voter history, it is possible to determine, voter by voter, whether someone will certainly vote, may possibly vote, or will not vote based on what they did in previous “like” elections.
- **Likelihood of supporting levy request:** Another feature of voter behavior is that some always support levies, and some never do. The only voters who can be persuaded by your messages are those who decide their vote on a case-by-case basis. Campaign persuasion messages should therefore be focused on the truly undecided, the ones sometimes called “swing” or “switch/swing” voters. People who are going to vote for your issue no matter what need to be thanked and reminded to vote. And, difficult as it is, the campaign needs to let go of those who always vote against all levies.

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Treating Voter Groups Differently

Different kinds of voters need different kinds of communication from the campaign. Here are some basics about the different voter groups.

- **Supporters:** Those who have been identified as certain or nearly certain to vote for you, either because they are part of a supportive voter bloc or because they have been individually identified as a supporter, are often called the “base.” While it is important to avoid taking supporters for granted, they don’t need to receive persuasion messages in the closing weeks of the campaign. Plan to communicate with them early, and to thank them for their support. Make sure you facilitate their voting process. Check voter rolls to make sure they are registered, get them an absentee ballot application, or offer to drive them to the polls on Election Day. Ask them to sign an endorsement form so the campaign may publish their name on a supporter list. Ask if you can put a sign in their yard, if they can donate a few dollars, or if they have a few hours to volunteer. Sending them “please vote yes” messages, however, is wasteful.

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- **Opponents:** While organized opposition in levy campaigns is rare, it does happen. The key to dealing with organized opposition is in planning for their attacks and not overreacting. Unorganized opponents, on the other hand, can pose a less obvious danger if we let them get under our skin or draw us out of our campaign plan. A good campaign manager must always be vigilant that everyone involved in the campaign is prepared to “bless our opponents and let them go.” You do not want to get into arguments with them, particularly if they are talking about their tax rate being too high. You certainly don’t want to spend resources trying to persuade them. If someone tells you they oppose your issue, put a code on your voter file and move on. Don’t send them any mail. Don’t call them on the phone. Just let them go.

The number one reason people will move one way or the other is because someone asks them for a pledge. Try to get a handshake on it.

- **Persuadable:** In most campaigns, these “swing” voters are the keys to a happy Election Night. In your planning phase, you will want to determine how many undecided voters you must persuade in order to reach 50% plus one of the projected voter turnout. What is known about their concerns? What kinds of messages and communications influence them? Where do they live? Do they have any common characteristics? These are the people to whom you will send your mail, who you will call on the phone, on whose door you will knock. Remember to ask them for their support. The number one reason people will move one way or the other is because someone asks them for a pledge. Try to get a handshake on it.

	Always Vote	Sometimes Vote	Never Vote
Always Support Levies	Thank you!	Turnout targets	X
Sometimes Support Levies	Persuasion targets	Secondary targets	X
Never Support Levies	X	X	X

Information from the Board of Elections

During your campaign planning phase, you’ll be conducting a targeting analysis employing information from your Board of Elections (BOE) and mathematical calculations. This usually involves creating a big spreadsheet full of data. The information comes from 2 main sources.

- **Voter Database:** Once you have identified a volunteer who is familiar with database programs and is willing to spend some tedious hours sorting and coding data, ask the BOE to provide a disk with the voter file data in a format compatible with what your volunteer wants or needs. (Microsoft Excel is a common format, easily obtainable from the BOE and easily uploaded into other database programs, such as Microsoft Access.) When you request the disk, make sure the BOE provides you with the following fields for each voter:
 - Full Name (all fields, including suffixes like “Jr.”)
 - Mailing Address (all fields, including secondary addresses such as P.O. Box numbers.)
 - Precinct Name (if precinct data is given in codes, make sure you get a paper copy of the code list.)
 - Voter ID Number (a unique number given to each voter and handy for some database operations.)
 - Date of Birth (so you can calculate age.)
 - Party Affiliation (so you can determine likelihood of voting in a primary election.)

- Voter History (this is a series of fields, one per election, indicating whether or not that person voted. You'll want every election for the past two years, plus the last two "like" elections.)
- Voter Registration Date (so you can tell if someone's failure to vote in previous elections is because they are a new voter.)
- School District Code (if your district covers more than one school district.)

Such computer files can also be downloaded from the Ohio Secretary of State's website, but it should be noted that statewide data is updated twice a year, whereas county board data is updated continuously. Also, you may want to make sure you purchase a new list after voter registration ends 30 days before the election. Finally, most county BOEs do not keep phone numbers in their databases, so unless you have a large number of volunteers willing to look up phone numbers, you'll need to explore using one of the vendors who append phone numbers to your database for a fee.

- **Past Election Information:** These are paper printouts of precinct-by-precinct results for previous elections. You'll want copies of returns from issues the library itself has had on the ballot in the last ten years, plus any other levies that have been on the ballot in your district recently, especially those from "like" elections.

Election Math/The Targeting Analysis Spreadsheet

With the BOE data in hand, you are ready to create your spreadsheet. Start with a list of the precincts in your district and, using the voter database, enter the number of registered voters in each. Next, calculate the Projected Voter Turnout for each precinct. To do this, enter precinct-by-precinct election returns for several past levy efforts – your own, and some others from "like" elections. Using the voter turnout percentages of previous "like" elections, estimate the voter turnout percentage for each precinct in your district. These will often vary widely within a district, or even within a village or township. If you are uncertain whether turnout is likely to be higher or lower than previous "like" elections based on what you are observing around you, ask your BOE or other elected officials for their opinions about your political environment.

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- Average Turnout Percent of registered voters in "like" elections: _____
- Projected Turnout Percent = Average Turnout Percent as adjusted up or down a point or two based on your observation of your political environment: _____
- (Projected Turnout Percent) X (Number of Registered Voters) = _____ = Projected Turnout.
- (Projected Turnout) / (2) = _____ + 1 = MAGIC NUMBER.

"Like" Elections

When doing targeting, it is vitally important to compare apples to apples – "like" elections to "like" elections. If you are planning to be on the ballot in November of a gubernatorial election year, you are most interested in turnout figures and "yes" vote percentages of other gubernatorial elections. If you are planning to be on the ballot in May of an odd-numbered year, you are most interested in the results of other May elections in odd-numbered years. When looking at past election data, especially voter behavior, make sure you are comparing similar elections.

Geographic Targeting

Like-minded voters tend to congregate in certain neighborhoods, making it sometimes possible to prioritize campaign efforts by precinct. Once you have created your spreadsheet, and performed your election math, you can look to see whether there are precincts in your district that either 1) have a high percentage of voters who regularly support levy efforts but have low turnout rates, or 2) have large numbers of voters who sometimes vote yes and sometimes don't. Using this information, you can focus your resources accordingly. While you want to try to reach all persuadable voters with your campaign message, limited financial or volunteer assets may not allow you to do all that you want to do. By employing geographic targeting, you can set priorities and save resources.

Demographic Targeting

While voter tendencies based on demographic data are usually studied through polling (which can be expensive and therefore often not employed by smaller campaigns), it is sometimes possible to affordably determine whether women, for example, are more likely to vote for your levy than men, or seniors, for another example, are less likely to support it than younger voters. Besides age and gender, other demographic factors might be: household income, education level, race, religion, party affiliation, or whether there are school-aged children in the household. Again, if financial constraints force you to limit your direct mail budget, you may choose to mail only to women, or only to registered Democrats and Republicans likely to vote in a primary, depending upon what your focus groups or other research methods tell you.

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Voter-based Targeting

In districts where the number of actual voters is small enough, an effort to identify voter inclinations one at a time can be productively employed. This is especially true where there is a committed band of volunteers willing to make phone calls and go door-to-door. "Voter Identification" efforts are usually focused at identifying a predetermined number of positive voters. If the magic number is 2800, for example, the campaign plan would be to find 3,000 people who tell one of the volunteers "Yes, I will vote for the levy." Efforts to turn out that group of 3,000 voters, combined with ongoing efforts to persuade undecided and unidentified voters, should put this campaign over the top.

Generally speaking, members of a household tend to vote alike. If someone tells you they are a supporter, chances are pretty good that their husband or wife is as well.

The keys to voter-based targeting are good data, a dedicated volunteer database manager working with the voter file, and lots of volunteers willing to ask voters directly whether your organization can count on their support on Election Day. In Voter ID, volunteers (and sometimes paid vendors) make notes of individual voters' responses, and feed the information back to the keeper of the voter file. At different points throughout a campaign, the database manager will be called upon to produce various lists: an undecided/unidentified voters list for direct mail, or a supporter list for turnout efforts. Make sure the person keeping the data is expecting to be available at those key times during the campaign.

Generally speaking, members of a household tend to vote alike. If someone tells you they are a supporter, chances are pretty good that their husband or wife is as well. If you can get an ID on the other voter in the house, that is terrific. If not, know that efforts to drag those unidentified members of supporter households to the polls on Election Day are more likely than not to be productive. Only six out of ten of those voters have to vote yes in order for your campaign to be ahead.

Conclusion

Targeting is an important campaign technique that has the power to save your campaign time, effort, and money by focusing on the most productive forms of communication with people who are likely to vote and in need of persuasion. Three pieces of mail can be sent to undecided voters for the cost of sending one piece of mail to everyone who lives in your district. By taking care to categorize and sort your voters by their tendencies, or by the tendencies of their neighborhoods, you can increase your campaign's effectiveness and save many volunteer hours and donations.