

Memo

To: League of Conservation Voters Education Fund (LCVEF)

Cc:

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Subject: SmarTargeting Review and Assessments

Date: May 27, 2004

This document provides an overview of the LCVEF SmarTargeting (ST) projects conducted during the period December 2003 through April 2004. We include a brief review of the process and an examination of what we have learned based on projects in three multi-state geographies. Details are below.

Project History

Beginning in December, GQR/Stratallys began conducting large sample surveys of three geographic areas: Southwest (AZ/NM/NV), Northwest (OR/WA), and Midwest (WI/MN). The goal was to produce targeting information for the LCVEF to use to find potential environmental activists. Using SmarTargeting techniques, we employed enhanced voter files that included voting frequency, census, and consumer data to conduct a large sample survey gauging attitudes about the environment. Using this data, we created a model that helped us identify potential environmental activists in these regions. This model – a combination of classification tree analysis and logistic regression – employed an environmental activist scale (“dependent variable”) derived from the survey data and over two-dozen independent variables from the enhanced voter files. The modeling results were then applied back to the enhanced voter files allowing us to assign every voter in each region a performance score indicating how likely they are to be an environmental activist, meaning we can identify environmental activists specifically by name and address. LCVEF now has complete access to lists of potential activists around which it can design a range of different issue and advocacy campaigns.

Project Results

The goal of the project was to enhance our ability to find environmental activists by allowing us to assign every voter in the three regions a performance score associated with being an environmental activist. In the upper deciles of the environmental activist scale, we were able to find from 30 to 14 percent of the electorate who are potential environmental activists. We had the greatest success in the Northwest where 30 percent in the upper deciles of the environmental activist

scale were identified as environmental activists and the least amount of success in the Midwest, where 14 percent in the upper deciles of the environmental activist scale were found to be environmental activists.

| TOTAL SOUTHWEST | | | | | |
|------------------|------------------|---------------------|---------------------|----------------------|----------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists |
| 1 | 375,098 | 28% | 105,027 | 45% | 168,794 |
| 2 | 375,098 | 23% | 86,273 | 35% | 131,284 |
| 3 | 375,098 | 19% | 71,269 | 27% | 101,276 |
| 4 | 375,098 | 18% | 67,518 | 29% | 108,778 |
| 5 | 375,098 | 17% | 63,767 | 28% | 105,027 |
| 6 | 375,098 | 12% | 45,012 | 24% | 90,024 |
| 7 | 375,098 | 11% | 41,261 | 24% | 90,024 |
| 8 | 375,098 | 9% | 33,759 | 22% | 82,522 |
| 9 | 375,098 | 7% | 26,257 | 23% | 86,273 |
| 10 | 375,098 | 7% | 26,257 | 14% | 52,514 |
| SOUTHWEST | 3,750,976 | 15% | 566,398 | 27% | 1,012,764 |

| ARIZONA | | | | | |
|----------------|------------------|---------------------|---------------------|----------------------|----------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists |
| 1 | 140,192 | 24% | 33,646 | 50% | 70,096 |
| 2 | 140,192 | 19% | 26,636 | 29% | 40,656 |
| 3 | 180,247 | 18% | 32,444 | 33% | 59,482 |
| 4 | 220,302 | 19% | 41,857 | 25% | 55,076 |
| 5 | 240,329 | 17% | 40,856 | 21% | 50,469 |
| 6 | 200,274 | 11% | 22,030 | 17% | 34,047 |
| 7 | 200,274 | 9% | 18,025 | 28% | 56,077 |
| 8 | 240,329 | 9% | 21,630 | 23% | 55,276 |
| 9 | 260,356 | 2% | 5,207 | 25% | 65,089 |
| 10 | 160,219 | 10% | 16,022 | 14% | 22,431 |
| ARIZONA | 2,002,742 | 14% | 280,384 | 22% | 440,603 |

| NEVADA | | | | | |
|---------------|------------------|---------------------|---------------------|----------------------|----------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists |
| 1 | 152,562 | 30% | 45,769 | 46% | 70,179 |
| 2 | 123,957 | 24% | 29,750 | 40% | 49,583 |
| 3 | 95,351 | 23% | 21,931 | 24% | 22,884 |
| 4 | 76,281 | 12% | 9,154 | 30% | 22,884 |
| 5 | 57,211 | 21% | 12,014 | 44% | 25,173 |
| 6 | 57,211 | 11% | 6,293 | 38% | 21,740 |
| 7 | 76,281 | 12% | 9,154 | 18% | 13,731 |
| 8 | 85,816 | 9% | 7,723 | 23% | 19,738 |
| 9 | 76,281 | 7% | 5,340 | 26% | 19,833 |
| 10 | 76,281 | 7% | 5,340 | 66% | 50,345 |
| NEVADA | 953,512 | 18% | 171,632 | 36% | 343,264 |

| NEW MEXICO | | | | | |
|-------------------|------------------|---------------------|---------------------|----------------------|----------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists |
| 1 | 47,683 | 30% | 14,305 | 35% | 16,689 |
| 2 | 63,578 | 19% | 12,080 | 28% | 17,802 |
| 3 | 71,525 | 25% | 17,881 | 27% | 19,312 |
| 4 | 79,472 | 21% | 16,689 | 31% | 24,636 |
| 5 | 95,366 | 9% | 8,583 | 23% | 21,934 |
| 6 | 103,313 | 12% | 12,398 | 24% | 24,795 |
| 7 | 87,599 | 13% | 11,388 | 24% | 21,024 |
| 8 | 71,525 | 9% | 6,437 | 20% | 14,305 |
| 9 | 71,525 | 12% | 8,583 | 20% | 14,305 |
| 10 | 103,314 | 5% | 5,166 | 12% | 12,398 |
| <i>NEW MEXICO</i> | 794,722 | 14% | 111,261 | 23% | 182,786 |

| TOTAL NORTHWEST | | | | | |
|------------------|------------------|---------------------|---------------------|----------------------|----------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists |
| 1 | 574,605 | 30 | 172,381 | 48% | 275,810 |
| 2 | 574,605 | 20 | 114,921 | 42% | 241,334 |
| 3 | 574,605 | 16 | 91,936 | 39% | 224,096 |
| 4 | 574,605 | 14 | 80,445 | 37% | 212,604 |
| 5 | 574,605 | 15 | 86,191 | 31% | 178,128 |
| 6 | 574,605 | 12 | 68,953 | 27% | 155,143 |
| 7 | 574,605 | 12 | 68,953 | 25% | 143,651 |
| 8 | 574,605 | 10 | 57,461 | 23% | 132,159 |
| 9 | 574,605 | 8 | 45,968 | 20% | 114,921 |
| 10 | 574,605 | 4 | 22,984 | 16% | 91,937 |
| <i>NORTHWEST</i> | 5,746,055 | 14 | 810,193 | 31% | 1,781,277 |

| OREGON | | | | | |
|---------------|------------------|---------------------|---------------------|----------------------|----------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists |
| 1 | 200,500 | 32% | 64,160 | 49% | 98,245 |
| 2 | 200,500 | 24% | 48,120 | 45% | 90,225 |
| 3 | 200,500 | 16% | 32,080 | 38% | 76,190 |
| 4 | 200,500 | 14% | 28,070 | 40% | 80,200 |
| 5 | 200,500 | 16% | 32,080 | 31% | 62,155 |
| 6 | 200,500 | 10% | 20,050 | 25% | 50,125 |
| 7 | 200,500 | 10% | 20,050 | 22% | 44,110 |
| 8 | 200,500 | 10% | 20,050 | 25% | 50,125 |
| 9 | 200,500 | 8% | 16,040 | 19% | 38,095 |
| 10 | 200,500 | 3% | 6,015 | 16% | 32,080 |
| <i>OREGON</i> | 2,005,010 | 14% | 280,701 | 32% | 641,603 |

| WASHINGTON | | | | | |
|-------------------|------------------|---------------------|---------------------|----------------------|----------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists |
| 1 | 374,105 | 28% | 104,749 | 46% | 172,088 |
| 2 | 374,105 | 17% | 63,598 | 36% | 134,678 |
| 3 | 374,105 | 17% | 63,598 | 40% | 149,642 |
| 4 | 374,105 | 14% | 52,375 | 36% | 134,678 |
| 5 | 374,105 | 14% | 52,375 | 31% | 115,973 |
| 6 | 374,105 | 13% | 48,634 | 30% | 112,232 |
| 7 | 374,105 | 14% | 52,375 | 27% | 101,008 |
| 8 | 374,105 | 9% | 33,669 | 22% | 82,303 |
| 9 | 374,105 | 9% | 33,669 | 22% | 82,303 |
| 10 | 374,105 | 7% | 26,187 | 15% | 56,116 |
| <i>WASHINGTON</i> | 3,741,045 | 14% | 523,746 | 29% | 1,084,903 |

| TOTAL MIDWEST | | | | | | | |
|----------------|--------------|---------------------|---------------------|----------------------|----------------------|-------------------|-------------------|
| Segment | Total Regis. | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists | % Labor Activists | # Labor Activists |
| 1 | 689,464 | 14% | 96,525 | 48% | 328,841 | 40% | 274,226 |
| 2 | 689,464 | 15% | 103,420 | 39% | 270,365 | 27% | 188,660 |
| 3 | 689,464 | 13% | 89,630 | 37% | 252,762 | 28% | 194,501 |
| 4 | 689,464 | 11% | 75,841 | 32% | 219,119 | 24% | 163,474 |
| 5 | 689,464 | 12% | 82,736 | 32% | 223,044 | 22% | 154,695 |
| 6 | 689,464 | 10% | 68,946 | 33% | 224,166 | 21% | 146,672 |
| 7 | 689,464 | 11% | 75,841 | 25% | 170,315 | 19% | 128,007 |
| 8 | 689,464 | 8% | 55,157 | 24% | 166,447 | 17% | 118,958 |
| 9 | 689,464 | 10% | 68,946 | 20% | 136,332 | 15% | 106,514 |
| 10 | 689,464 | 8% | 55,157 | 18% | 126,209 | 12% | 80,581 |
| <i>MIDWEST</i> | 6,894,645 | 11% | 772,199 | 31% | 2,117,528 | 23% | 1,556,142 |

| TOTAL MINNESOTA | | | | | | | |
|-----------------|------------------|---------------------|---------------------|----------------------|----------------------|-------------------|-------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists | % Labor Activists | # Labor Activists |
| 1 | 274,460 | 14% | 38,424 | 53% | 145,464 | 44% | 120,762 |
| 2 | 274,460 | 13% | 35,680 | 44% | 120,762 | 39% | 107,039 |
| 3 | 274,460 | 14% | 38,424 | 37% | 101,550 | 42% | 115,273 |
| 4 | 274,460 | 9% | 24,701 | 32% | 87,827 | 24% | 65,870 |
| 5 | 274,460 | 10% | 27,446 | 34% | 93,316 | 29% | 79,593 |
| 6 | 274,460 | 7% | 19,212 | 33% | 90,572 | 29% | 79,593 |
| 7 | 274,460 | 13% | 35,680 | 27% | 74,104 | 24% | 65,870 |
| 8 | 274,460 | 9% | 24,701 | 23% | 63,126 | 22% | 60,381 |
| 9 | 274,460 | 5% | 13,723 | 23% | 63,126 | 22% | 60,381 |
| 10 | 274,460 | 12% | 32,935 | 11% | 30,191 | 18% | 49,403 |
| <i>Minn.</i> | 2,744,600 | 11% | 301,906 | 34% | 933,164 | 25% | 686,150 |

| TOTAL WISCONSIN | | | | | | | |
|-----------------|------------------|---------------------|---------------------|----------------------|----------------------|-------------------|-------------------|
| Segment | Total Registered | % Enviro. Activists | # Enviro. Activists | % Abortion Activists | # Abortion Activists | % Labor Activists | # Labor Activists |
| 1 | 415,005 | 15% | 62,251 | 44% | 182,602 | 54% | 224,103 |
| 2 | 415,005 | 17% | 70,551 | 37% | 153,552 | 39% | 161,852 |
| 3 | 415,005 | 13% | 53,951 | 36% | 149,402 | 39% | 161,852 |
| 4 | 415,005 | 13% | 53,951 | 32% | 132,802 | 41% | 170,152 |
| 5 | 415,005 | 12% | 49,801 | 30% | 124,502 | 35% | 145,252 |
| 6 | 415,005 | 11% | 45,651 | 32% | 132,802 | 29% | 120,351 |
| 7 | 415,005 | 9% | 37,350 | 23% | 95,451 | 27% | 112,051 |
| 8 | 415,005 | 7% | 29,050 | 25% | 103,751 | 24% | 99,601 |
| 9 | 415,005 | 12% | 49,801 | 19% | 78,851 | 21% | 87,151 |
| 10 | 415,005 | 6% | 24,900 | 19% | 78,851 | 16% | 66,401 |
| <i>Wisc.</i> | 4,150,045 | 11% | 456,505 | 29% | 1,203,513 | 35% | 1,452,516 |

We also created a set of “secondary models” with views of abortion as the dependent variable (also derived from the sample survey), which we can overlay with the primary environmental activist model, since every person on the enhanced voter file is assigned a performance score associated with their views on choice as well. The notion here is that people who are pro-choice are also more likely to hold progressive views on the environment, and we can use this secondary model to further refine our attempts to pull environmental activists from the voter files.

Validation

We validated the results from the Southwest. The results from the Northwest and Midwest have not been validated. The results of the validation studies were mixed and suggest important possibilities and limitations to the SmarTargeting approach.

First, the models are accurate in the sense that they predict that voters in the upper deciles of the environmental activist scale have the attitudes we predict them to have. For instance, in the Southwest, we predicted that 33 percent of the top twentile¹ would be environmental activists, and in the validation sample that was pulled from the top twentile, 31 percent are, in fact, environmental activists.

| Southwest Environmental Activist Model | ST Top 5% Projection (N=255) | ST Top 5% Validation Result (N=153) | General Population (N=5000) |
|--|------------------------------|-------------------------------------|-----------------------------|
| Active Enviros (70-100) | 33% | 31% | 16% |

The validation study in the Southwest, however, also shows that an “informed” pull from the voter file yields an identical percentage of names to pull as the model. In other words, when GQR/Stratalys contacts voters we believe *a priori*

¹ A twentile is defined as 5 percent of the population/sample. This is analogous to a “decile”, which constitutes 10 percent of a population/sample.

are more likely to be activists (e.g., women, urban dwellers, under 50 years of age), we produce nearly the same results – 31 percent in the upper twentile. This suggests that with full demographic and political information – particularly party identification – traditional targeting can be as efficient as SmarTargeting. This also makes ST that much more valuable to LCVEF, since 501c3 organizations cannot use party identification information when pulling lists for their citizen activation efforts.

| Southwest Environmental Activist Model | ST Top 5% Validation II Result (N=153) | Traditional Targeting (N=200) |
|--|--|-------------------------------|
| Active Enviros (70-100) | 33% | 31% |

This is not to say that using the ST system entails contacting the same people that would be contacted under traditional targeting efforts. ST targets in the Southwest are, for example, more male and less likely to be included in traditional citizen activation efforts. Thirty-five percent of the ST sample is male as compared to 1% male in the traditional sample. By fiat, the traditional strategy looks only to women as potential activists. ST broadens the possible universe of activists to look beyond simple demographic profiles. In fact, the men in the ST validation sample are slightly more pro-environment than the women. These men may never have received contacts from LCVEF since they are outside of the normal way we consider communicating with progressive allies.

| Southwest Demo & Attitudinal Profile | ST | Traditional |
|--------------------------------------|------|-------------|
| Gender (% male) | 35% | 1% |
| Race (% White) | 87% | 77% |
| Children 18 or younger (% yes) | 65% | 46% |
| Environmental Groups (mean rating) | 66.8 | 68.3 |
| Labor Unions (mean rating) | 57.2 | 63.9 |

In a GQR/Stratalys test on another ST project in a non-party registration state, our model performed 8-points better than an informed pull from the voter file. These results suggest to us that in states without party registration, SmarTargeting can produce efficiencies that would yield substantial savings in large targeting projects.

Reflection on SmarTargeting

There have now been three LCVEF-related validations of SmarTargeting (ST) plus one unrelated validation. The Southwest validation presented the most difficult test yet. The three southwest states all have party registration on the voter file, which makes ST targeting more efficient, but also makes even the simplest targeting approach more efficient as well. Since our informed sample pull relied on experience and a wealth of polling data, the main advantage offered by ST would be the use of other non-political (i.e., consumer) data in the enhanced voter files. These

additional data sets provide only an incremental improvement when substantial political information is known and used in targeting. At the same time, because traditional targeting relies solely on demographic data, we exclude *a priori* certain voters from our efforts even if they hold progressive attitudes about the environment.

In the absence of partisanship on the state file, ST offers moderate advantages over a traditional targeting strategy to obtain an advocacy action. ST becomes even more valuable for 501c3 organizations that cannot use party identification information when pulling lists for their citizen activation efforts. Here, ST produces a system that works to reach a population not normally contacted by traditional targeting (e.g. males in the Southwest). There is a price point at which ST becomes the preferred alternative over traditional targeting. This price point is a function of (1) the scale of the contact initiative being considered (i.e., the larger the initiative, the greater the payoff in real dollars due to incremental improvements in targeting efficiency) and (2) the cost of deploying ST, which can be reduced by shortening the length of the attitudinal questionnaire and the sample size used for the modeling.