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To: League of Conservation Voters Education Fund

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## - SmarTargeting Validation Study II -

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This memo details the results from a second validation study designed to evaluate SmarTargeting (ST) that was done for the League of Conservation Voters Education Fund (LCVEF) in the Southwest states of Arizona, Nevada, and New Mexico. Three different samples were drawn from the enhanced voter files, those voter files with voting frequency, census, and consumer data, etc. and one from a traditional voter file, and then surveyed in order to allow for three main tests. The first test involves an assessment of new ST Environmental Activist (Primary) and Abortion (Secondary) models that were re-analyzed and re-estimated following the first validation study. The second test pits ST against an informed voter file pull (i.e., traditional targeting). The third test examines how environmental attitudes may have changed over time in the Southwest by re-interviewing individuals who were included in the original N=5000 survey conducted in 2003.

The summary findings are as follows. First, the new ST models perform relatively well and are an improvement over the original scorings. Second, ST performs identically to traditional targeting in this test with both systems reaching the same percentage of environmental activists, each finding 31%. Third, there are some minor shifts in opinions, but important environmental attitudes are largely stable.

### Research Design

#### Traditional Sample (200 Cases)

We pulled a sample of Southwest registered voters from the traditional voter file. Based on a collective polling knowledge of GQR/Stratalys about these states, we have identified the following demographic characteristics for which to target potential activists:

- Women
- Under 50 years of age
- Living in counties that are non-rural (that is, urban or suburban)

#### SmarTargeting Environmental Activist Sample (150 Cases)

We used the scoring of the new, re-estimated ST Environmental Activist model to pull a sample of those scoring highest on the model.

SmarTargeting Abortion Model Sample (150 Cases)

We used the scoring done on the new Abortion model to pull a sample of those scoring highest on the abortion rights supporter model.

Panel Back Sample (100 Cases)

From the original survey of 5,000 registrants, we pulled a random sample of 1,000 former respondents and re-called 100 completes with the same questionnaire. This panel allows us to track changes in attitudes over time to determine if attitudinal shifts are affecting ST model performance.

Validation Study II Findings

New ST Models – Environmental Activist and Abortion

Following the first validation of the Southwest ST models, GQR/Stratalys re-estimated all models in an effort to constrain overfitting and improve targeting efficiency. The new models did perform better. 31% of the ST sample in this second round of validation can be categorized as active environmentalists as compared to 25% in the first validation study. This is slightly below the model projection (33%), but still a respectable result.

Environmental Activist Model	ST Top 5% Projection (N=255)	ST Top 5% Validation II Result (N=153)	ST Top 5% Validation I Result (N=200)	General Population (N=5000)
Active Enviros (70-100)	33%	31%	25%	16%

The ST Abortion model sample contains 46% people who are strong supporters of a woman's right to choose. This is a slightly better performance than the Abortion model in the first validation (43%).

Abortion Model	ST Top 5% Projection (N=255)	ST Top 5% Validation II Result (N=150)	ST Top 5% Validation I Result (N=200)	General Population (N=5000)
A strong supporter of a woman's right to choose (top box category=7)	53%	46%	43%	29%

This validation did not contain a direct test of secondary model overlaying, but we can draw some inferences by comparing the attributes of individuals in the ST Environmental Activist model sample who had above average ST Abortion model scores as compared to those with below average Abortion scores. By narrowing the selection of targets to only those who

scored highest on both the Environmental Activist and Abortion models, environmental attitudes are slightly more favorable as a consequence of overlaying the Abortion secondary model – 33% activists vs. 28% activists.

### ST vs. Traditional Targeting

The most important test of this validation study is the comparison of the targeting efficiencies of ST vs. traditional targeting. Traditional targeting performs equally as well as ST in locating activists. Thirty-one percent of both the ST sample and the traditional targeting sample were activists. Other measures show similar results. The mean of the 0-100 activist scale was 56.6 in the ST sample and 56.0 in the traditional sample.

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

This is not to say that using the ST system entails contacting the same people that would be contacted under traditional targeting efforts. One of the major differences between the ST Environmental Activist model sample and the traditional sample is that ST locates a much higher proportion of male environmental activists than our traditional targeting solution. 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.

Other measures suggest that ST targets are not necessarily the same as would be reached by traditional contact efforts.

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

### Panel Back vs. Original Sample

Comparing the responses of identical individuals surveyed in the original ST project to their responses now, we find few attitudinal shifts over time. For instance, the mean of the environmental activism scale (0-100) was 46.7 in the original sample and 47.5 in the panel back. 20% of the original sample was categorized as active environmentalists; this proportion declines slightly to 17% in the panel back.

## Cumulative Reflections on Microtargeting

There have now been three LCVEF-related validations of SmarTargeting (ST) plus one unrelated validation. This latest 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 it 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 an incremental improvement when substantial political information is known and used in targeting.

We can compare this with another GQR/Stratalys projects' validation study in a different non-party registration state that yielded an 8-point advantage over an informed sample pull. It may be the case that ST helps most in situations where limited political information is available. By this, we mainly mean in states without party registration. Even in this context though, the efficiency advantage is still a function of consumer data and thus cannot be expected to yield orders of magnitude improvements. This lends additional support to the idea that ST may have a place in targeting efforts, but various factors need to be weighed in order to justify it.

It may be relevant to note that some organizations do not have the benefit of recent polling data in contributing to their list development efforts. Consequently, the definition of an "informed" pull may vary considerably. This is not consequential for LCVEF specifically, but it may be important in terms of future efforts to systematize microtargeting.

In the absence of partisanship on the state file, ST offers moderate advantages over 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 also a price point at which ST becomes the preferred alternative. 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. Clearly it is important to reduce the overall cost of ST, including significantly shortening the questionnaire even to 5-8 questions, to make this technology cost effective. This means that we will have relatively little attitudinal and demographic information about our targets, but it is probably worth the tradeoff.

Please note that these conclusions are based on the exclusive use of InfoUSA consumer data. Other analyses (none of which have been validated in real world exercises) suggest that InfoUSA may not be the best data source. Acxiom consumer data appears to hold moderately greater promise for a range of targeting efforts, including environmental activism and choice. However, this added leverage needs to be weighed against the additional cost that purchasing the data for post-analysis use (i.e., the contact program itself) would entail. Without a long-term, mass usage agreement with Acxiom, it is unclear whether an individual group such as LCVEF could negotiate sufficient volume discounts from a consumer database corporation.