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Vertical and horizontal targeting: combined use for effective campaigning

By Shellie Garrett

Since the beginning of electoral politics, candidates have attempted to target their campaign efforts toward voters most likely to support them at the polls. The emergence of the high speed computer as a campaign tool has it possible for campaigns to use information from past elections, the Census and voter files which had previously been too unwieldy. Rather than having too little information, campaign managers now face the problem of using the abundance of information available to target likely supporters which the campaign must reach.

Political targeting methods used by campaigns tend to sort into two types—vertical targeting methods and horizontal targeting methods.

Vertical targeting methods rate geographic units (precincts, wards, towns, counties, etc.) according to their political behavior. The information derived from vertical targeting gives the manager a tool to help decide where in the district the campaign should concentrate its efforts. Vertical targeting's disadvantages come from the fact that the information gathered is not voter-specific. It is impossible to determine which individual voters make up the pool of likely supporters based upon vertical targeting information alone. For example, a precinct which is determined to have a potential support level of 60% for a candidate also have 40% of the voters defined as unlikely to support the candidate. Vertical targeting alone cannot tell the manager which 60% of the voters are the potential supporters. Vertical targeting alone does not tell the campaign who are potential supporters that live in "low priority" precincts. While small in number, these voters could be important in a close race.

Horizontal targeting identifies voters with similar characteristics (age, sex, party, vote history, length of residence, homeownership, renter, etc.) and groups them district-wide without regard to the political characteristics of their geographic unit. Horizontal targeting makes polling data more useful, especially the crosstab information. For example, a campaign's polling data could show that Hispanic voters in the district consider jobs and bi-lingual education as the two most important issues. District-wide, however, these issues are much less important. The campaign would emphasize these issues when campaigning to Hispanic voters who are identified by matching a Spanish surname file to the voter file.

Effective horizontal targeting depends upon the amount of information available about each individual voter. The less information available, the less effective the horizontal

targeting effort will be. Horizontal targeting also ignores political information about precincts where members of a horizontal target group live. While a survey crosstab on a survey may show, for example, that homeowners are worried about high taxes, it is not safe to assume that owners living in strong Republican areas have the same views on taxes as those living in strong Democratic areas.

Vertical and horizontal targeting

Combining vertical and horizontal targeting techniques lets the campaign make use of the advantages of both while minimizing the drawbacks. Using both methods makes both election returns and survey research data useful in creating the universe of potential supporters for the campaign to contact. Proper use of both methods will create a target universe big enough to get the needed number of votes to win while at the same time minimizing the number of unlikely supporters contacted.

One example of a campaign which effectively used both vertical and horizontal targeting methods was the November, 1984 reelection effort of San Francisco Supervisor John Molinari. Molinari, a moderate Democrat and political ally of Mayor Dianne Feinstein, is considered a potential candidate to succeed Feinstein as Mayor in 1987 (she cannot run for a third consecutive term under the City Charter). One of Molinari's chief rivals to succeed Feinstein is Supervisor Quentin Kopp, who was also seeking reelection. San Francisco voters could vote for up to five candidates. The candidate getting the most votes became President of the Board of Supervisors, which could be an important post to someone seeking the mayor's office. Both Kopp and Molinari were viewed as rivals for the Board Presidency, and their campaigns reflected that rivalry, even though a voter could choose to vote for both men.

Early in the campaign, Molinari political consultant Ron Smith met with Shellie Garrett of Voter Contact Services to develop a target group of potential Molinari voters from among San Francisco's 425,000 registered voters. Smith determined, based upon past elections, that 125,000 votes would be needed for Molinari to finish first. To achieve this vote goal, Smith and Garrett felt that the pool of potential Molinari voters to be campaigned to should include from 200,000 to 225,000 voters. The first decision Smith and Garrett reached was to include only voters who had voted in any one of the previous four elections (June, 1982 primary, November, 1982 general election, November, 1983 municipal election and June, 1984 primary). It was reasoned that most voters who didn't vote in any of these elections either would not cast a vote for supervisor if they did go to the polls or, more likely, they no longer lived at the address where they were registered. Elimination of these non-voters reduced the pool for the eventual target group from 425,000 to 290,000.

The next step was to look at election returns on a precinct-by-precinct basis, particularly elections which involved Kopp and/or Molinari. Particular importance was paid to the 1979 mayor's race between Kopp and Feinstein. It was felt the precinct analysis would highlight Kopp's strong and weak areas, which returns from his previous races for Supervisor would mask because of their multi-candidate nature. From this analysis, precincts were grouped into three categories: strong Kopp, neutral and strong anti-Kopp. In strong anti-Kopp precincts, all voters who fit the above category (i.e., voted at least once in the last four elections) were included in the target group. In the neutral precinct grouping, only renters were included, while in the strong Kopp precincts only voters who had registered

since 1980 were included. The target group created from this process included around 215,000 registered voters in 175,000 households. The campaign sent several direct mail pieces to voters in this target group, either to all voters in the group or to selected segments within the group which were defined by further vertical and horizontal targeting. For example, blacks, gays, women and renters received specific mail pieces which either emphasized Molinari's record or attacked Kopp's record on issues of concern to each respective group. In all, an equivalent of four pieces of mail was sent to the target group during the campaign.

Molinari finished first receiving 148,626 votes (Kopp finished third with 138,858). The Molinari target program allowed the campaign to spend its efforts on likely supporters and ignore non-voters and voters unlikely to vote for Molinari. The campaign was an excellent example of the benefits which can be derived by combining vertical and horizontal targeting methods. These benefits included a better definition of the target audience of potential supporters and the ability to send specific messages to specific voter groups within the primary target group.

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