

The background features a stylized American flag with a blue field of white stars in the upper left and red and white wavy stripes below. In the foreground, the silhouettes of a woman on the left and a man on the right are shown with their arms raised in a celebratory gesture. The man's shadow is cast on the light blue ground below him.

Giving You the Edge – The Science of Winning Elections

By Michael Lieberman

Giving You the Edge – The Science of Winning Elections

To win a political campaign you need vision, experience, integrity and real understanding of the mechanics of elections. The first three you bring with you. The information in this eBook provides the final element necessary to enable you to achieve victory and take office to use your vision, experience and integrity for the public good.

Giving You the Edge – The Science of Winning Elections, written by experienced political consultant Michael Lieberman, identifies and explains the use of key research methodology and multivariate analysis in supporting political campaign goals through the various stages of an election.

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Giving You the Edge – The Science of Winning Elections



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RESEARCH PROCESS



INITIAL RESEARCH OBJECTIVES

- **Who** lives in your district;
- **Which** issues are important to them and what they think about these Key Issues;
- **What** they think about you and your rival, and why;
- **How** to use your critical resources – time, money, staff and volunteers – most effectively.



STEPS TO VICTORY

- A successful campaign is like a successful business – it has to understand its market and allocate its resources effectively to capture the majority share of the market. Like a successful business, **a successful campaign needs clear information to enable it to make the most of its valuable resources.**
- Campaign research starts with a **baseline survey** – asking carefully worded questions of a scientifically selected sample of people by phone, online or face-to-face – to analyze the issue environment, demographics, party affiliation, and relative positive and negative images of the candidates.
- The polling data and research must be analyzed more deeply to facilitate clear, understandable, effective and easily implemented **strategic and tactical decisions.**
- This eBook describes proven analytical techniques used to **extract the optimal information** from polling data to win elections.



POLITICAL CAMPAIGN PROGRESSION

CANDIDATE COMMITMENT

RESEARCH

STRATEGY AND MESSAGE DEVELOPMENT

TARGETING

COMMUNICATIONS

OUTREACH

ADVERTISING THIRD PARTY EARNED MEDIA DIGITAL

VOTER COALITIONS OPINION LEADERS CONTRIBUTORS

MOBILIZE VOTERS

WIN!



KEY FACTORS IN DEVELOPING AN EFFECTIVE COMMUNICATION STRATEGY

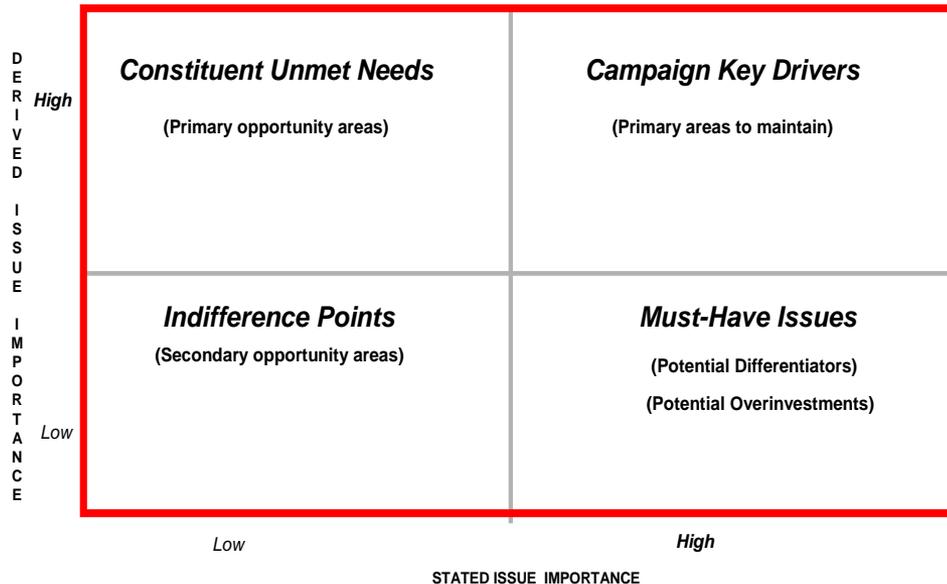


SETTING THE AGENDA



IDENTIFYING THE KEY ISSUES

Stated versus Derived Importance Analysis



Survey Design

- We chart the issues voters say are important.
- We evaluate each candidate on these issues together with individual's 'intent to vote'.

Issue Driver based on 'stacked' results of all candidates.



SETTING THE AGENDA

Stated versus Derived Importance Analysis

D E R I V E D I S S U E I M P O R T A N C E	High	Constituent Unmet Needs (Wedge Issues) Health Care Abortion National Security Tax Policy Social Security	Campaign Key Drivers Education Environment Immigration Iraq & "War on Terror" Change
	Low	Indifference Points Budget & Spending Corporations/Regulation Crime & Punishment Drug Policy Oversight & Reform Stem Cell Research Trade & Globalization	Must-Have Issues Civil Rights Energy Policy Family Values Foreign Policy Jobs & Unemployment Welfare & Poverty
		Low	High
		STATED ISSUE IMPORTANCE	

- Key Drivers:** Positions on Key Issues that define the campaign.
- Must-Haves:** Campaign is built on Must-Have Issues to retain the base.
- Wedge Issues:** Though not stated as 'Highly Important,' these have been shown to drive the vote for all candidates – these are Issues that can turn 'undecideds' into your voters.

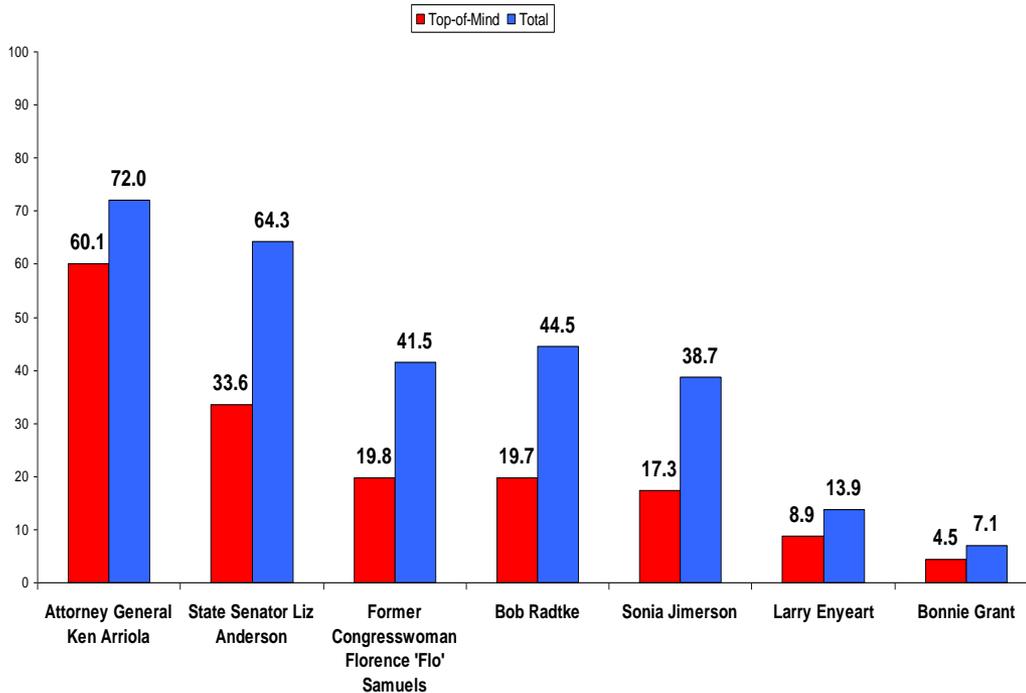


DEFINING THE CANDIDATE



CANDIDATE RECOGNITION

Top-of-Mind vs. Aided Candidate Awareness



Though Liz Anderson has unaided awareness of one-third of likely Democratic primary voters, her aided name recognition gains considerably on frontrunner, Attorney General Ken Arriola, who holds statewide office. She needs to run a series of 'introduction' advertisements.

Survey Design

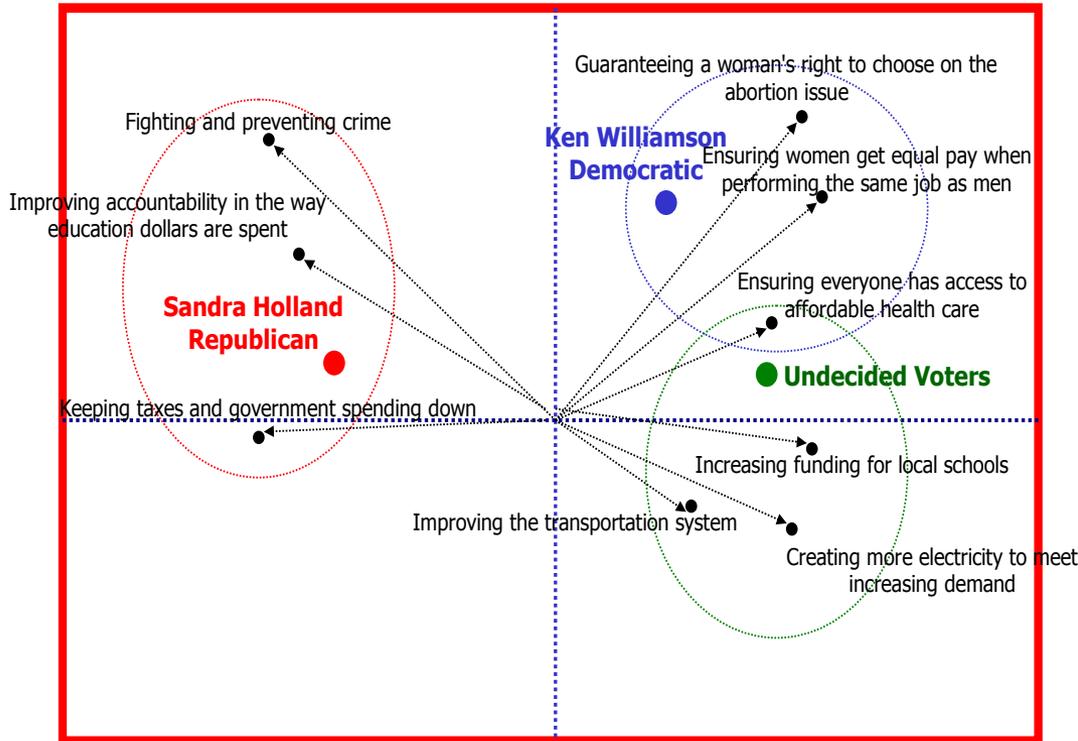
- Please name the candidate's running in the United States Senate Democrat Primary in June?
- [If not mentioned] Have you heard of....?

Sample: Likely Democratic Primary Voters



MAPPING THE CANDIDATES ON THE ISSUES

Correspondence Analysis



Survey Design

- Ratings of each candidate for each issue;
- Could be numerical scale (e.g. 1-to-10).
- Applies to (1/0).

Interpretation

- Candidates are like planets, issues are like moons;
- Issues near a candidate are associated with him or her (strengths).
- Issues near Undecided are *wedge issues*.

Sample: Likely General Election Voters



THE ISSUE MATRIX

Candidate Issue Targeting

	Target Issues	Strengths
Stronger	These are "target issues" to improve voter support. The Candidate is performing below average and these attributes are important.	These are the "primary strengths" of the Candidate.
Impact on Likely to Vote	These attributes are not crucial. Immediate focus should be on target issues.	Voters' concerns are being met, though these attributes are not important for candidate support. Potential for resource misallocation.
Weaker	Secondary Opportunities	Low Priority
	Weaker Performance	Stronger Performance
	Candidate Performance Scores	

Survey Design

- We chart the candidates on the issues.
- We use a scale (1-to-10) to measure 'Likely to Vote' for the candidate.

Issue Driver based on correlation of 'Likely to Vote' and candidate performance ratings.



CANDIDATE MATRIX – DEFINING IMAGE

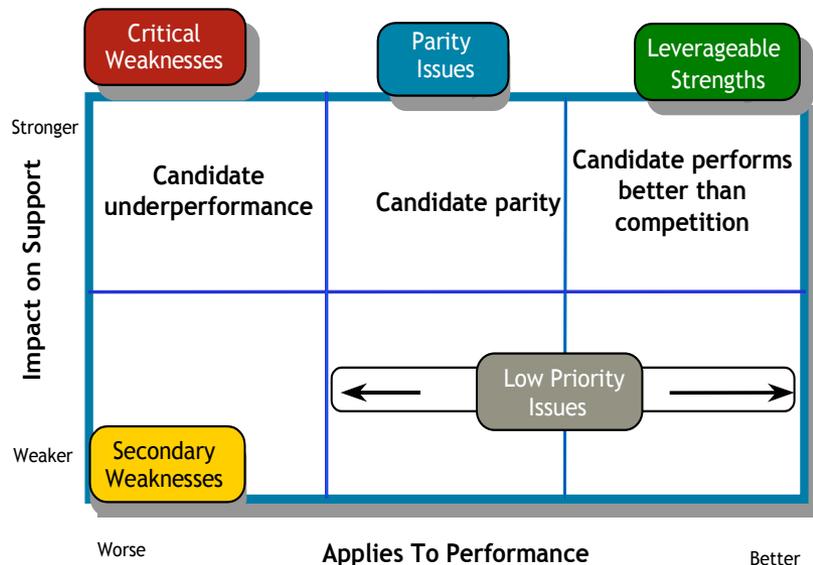
What Issue Or Action Do You Associate With Mike Corwin?								
Sample: Suburban Voters								
		Michael Corwin - Democrat for US Senator	Correlation Between Issue and 'Vote for 'Corwin'	Percentage Association with Corwin	Impact on 'Corwin Support'	Performance Rank for 'Corwin Support'	Matrix Quadrant	Impact Vote Rank
c	3	Health care issues/high cost of insurance	0.428	71%	High	Better	Primary Corwin Strength	1
a	1	Improve State Infrastructure	0.347	12%	High	Worse	Target Issues	2
b	2	Lack of funding for education	0.342	46%	High	Better	Primary Corwin Strength	3
e	5	Lower Property Taxes	0.319	27%	High	Worse	Target Issues	4
h	8	Economic recovery	0.319	59%	High	Better	Primary Corwin Strength	5
l	11	Environmental protection	0.315	62%	High	Better	Primary Corwin Strength	6
g	7	Illegal Immigration	0.315	24%	High	Worse	Target Issues	7
k	10	Lack of affordable housing	0.269	18%	Low Priority Potential Advantage	Worse	Back Burner Issues	8
m	12	Poverty/helping the poor	0.256	16%	Low Priority Potential Advantage	Worse	Back Burner Issues	9
f	6	Cares about the people	0.253	33%	Low Priority Potential Advantage	Worse	Back Burner Issues	10
d	4	Growth/development	0.252	50%	Low Priority Potential Advantage	Better	Low Priority Potential Advantage	11
j	0	Tough on crime	0.249	10%	Low Priority Potential Advantage	Worse	Back Burner Issues	12
i	9	State budget deficit/budget issues	0.245	35%	Low Priority Potential Advantage	Worse	Back Burner Issues	13

Strategic Conclusion: Mike Corwin needs to tout his 'Quality of Life' credentials and show that he can improve the state's highways, lower property taxes (an important issue for the suburban vote), and suggest viable solutions to the issue of 'Immigration'.



DEFINING HEAD-TO-HEAD COMPETITIVE ISSUES

Competitive Issue Targeting



Issue Driver is based on the correlation of voter intention with candidate performance for *all* candidates in the race.*

* Even though Collier and Tomaszewski receive under 5% of the vote, they are still included in the stacked data to determine Impact Support.

Strategic Goal

- To compare your candidate directly with opponents on issues that drive the election.

Survey Design

- Array performance for your candidate and all opponents on issues.
- Thinking ahead, if the general election for the U.S. Senate were held today, and the candidates were Alexander Davis (Democrat) and Jeanette C. Murphy (Republican), Beatrix Collier (Independent), or Lew Tomaszewski (Tea Party), for whom would you vote?



DEFINING HEAD-TO-HEAD COMPETITIVE ISSUES

Competitive Attribute Targeting

Alex Davis vs. Jeanette Murphy

Statewide Sample		Correlation of Intent to Vote	Top 2 Box (6 7) Percentages 'Describes Davis'	Top 2 Box (6 7) Percentages 'Describes Murphy'	% Def Diff	STAT Diff?	Vote Driver Class	Versus Opponent	Impact Vote Rank	
a	1	Is a strong leader	0.391	43%	55%	-12%	0.00	High	Weakness vs. Murphy	1
f	6	Has the experience to be US Senator	0.370	41%	60%	-19%	0.00	High	Weakness vs. Murphy	2
c	3	Has new ideas and a fresh approach to problems	0.368	50%	36%	13%	0.00	High	Strength vs. Murphy	3
d	4	Would represent the state more effectively in the Senate.	0.353	39%	57%	-18%	0.00	High	Weakness vs. Murphy	4
g	7	Would find a fair and equitable solution to illegal immigration	0.341	32%	23%	9%	0.01	High	Strength vs. Murphy	5
k	11	Has the right kind of experience to be US Senator.	0.306	16%	53%	-37%	0.00	High	Weakness vs. Murphy	6
e	5	Is a straight-talker, doesn't just say what people want to hear	0.302	47%	37%	11%	0.00	High	Strength vs. Murphy	7
h	8	Can overcome the partisan politics in Washington	0.273	26%	27%	-2%	0.61	Low	Low Priority-Left	9
b	2	Poverty/helping the poor	0.267	39%	33%	6%	0.12	Low	Low Priority-Left	10
i	9	Would change business as usual in Washington	0.258	37%	29%	8%	0.02	Low	Low Priority-Right	11
j	10	Tough on crime	0.254	41%	50%	-9%	0.01	Low	Secondary Attribute	12
n	14	Would stand up for the middle class	0.199	50%	50%	0%	0.89	Low	Low Priority-Left	13
o	15	Will be tough on enemies of the United States	0.186	37%	49%	-12%	0.00	Low	Secondary Attribute	14
Mean			0.298	38%						

Strategic Conclusion: State Senator Alex Davis, the Democratic challenger, beats Jeanette Murphy as the honest outsider with a fresh view of Washington. Murphy, the incumbent U.S. Senator, has considerable strength and benefits from her experience in the race for this U.S. Senate seat.



DEFINING *NEGATIVE* OPPONENT ISSUES

NEGATIVE OPPONENT ISSUE ANALYSIS

Sample: Independent Voters

Incumbent Jeanette Murphy Negatives

Campaign Issues		Correlation of Intent to NOT Vote for Jeanette Murphy	Top 2 Box (4 5) Percentages "Describes Murphy" - Vote for Murphy	Top 2 Box (4 5) Percentages "Describes Murphy" - NOT Vote for Murphy	% Def Diff	STAT Diff?	Voting Driver	Versus Opponent
k	11 Is running a negative campaign	0.420	4%	20%	-16%	0.00	Driver of 'NOT Voting for Jeanette Murphy'	SIGNIFICANT NEGATIVE NOT Jeanette Murphy DRIVER
l	12 Is in the pocket of lobbyists and big corporate America	0.376	7%	40%	-33%	0.00	Driver of 'NOT Voting for Jeanette Murphy'	SIGNIFICANT NEGATIVE NOT Jeanette Murphy DRIVER
b	2 Is out of touch with the lives of ordinary Americans	0.363	1%	18%	-17%	0.00	Driver of 'NOT Voting for Jeanette Murphy'	SIGNIFICANT NEGATIVE NOT Jeanette Murphy DRIVER
h	8 Would lower taxes for big corporations, not the middle class	0.253	7%	18%	-11%	0.03	Driver of 'NOT Voting for Jeanette Murphy'	SIGNIFICANT NEGATIVE NOT Jeanette Murphy DRIVER
i	9 Tells people what they need to know, not what they want to hear	-0.348	26%	16%	9%	0.13	Jeanette Murphy Driver	Positive Murphy Driver
f	6 Would make health care more affordable	-0.407	30%	14%	16%	0.02	Jeanette Murphy Driver	Positive Murphy Driver
c	3 Can overcome the partisan politics in Washington	-0.451	32%	10%	23%	0.00	Jeanette Murphy Driver	Positive Murphy Driver
g	7 Would put the needs of working and middle class Americans first, ahead of special interests and big corporations	-0.486	46%	15%	31%	0.00	Jeanette Murphy Driver	Positive Murphy Driver
e	5 Would lower taxes for the middle class	-0.510	42%	13%	29%	0.00	Jeanette Murphy Driver	Positive Murphy Driver
a	1 Understands how to get our economy moving again and create jobs	-0.564	29%	6%	23%	0.00	Jeanette Murphy Driver	Positive Murphy Driver
d	4 Is someone I trust	-0.602	35%	8%	27%	0.00	Jeanette Murphy Driver	Positive Murphy Driver
j	10 Is ready to be US Senator	-0.661	39%	4%	35%	0.00	Jeanette Murphy Driver	Positive Murphy Driver

- Strategic Conclusion:** By employing the *Competitive Issue Matrix*, we help the Davis campaign understand how to portray Senator Jeanette Murphy among Independent Voters. Senator Murphy –
 - Is running a negative campaign.
 - Is in the pocket of lobbyists and big corporate America.
 - Is out of touch with the lives of ordinary Americans.
 - Would lower taxes for big corporations, not the middle class.



ISSUES AND THE GAIN / LOSS OF SUPPORT

Issue-Effects

Liz Anderson for Congress

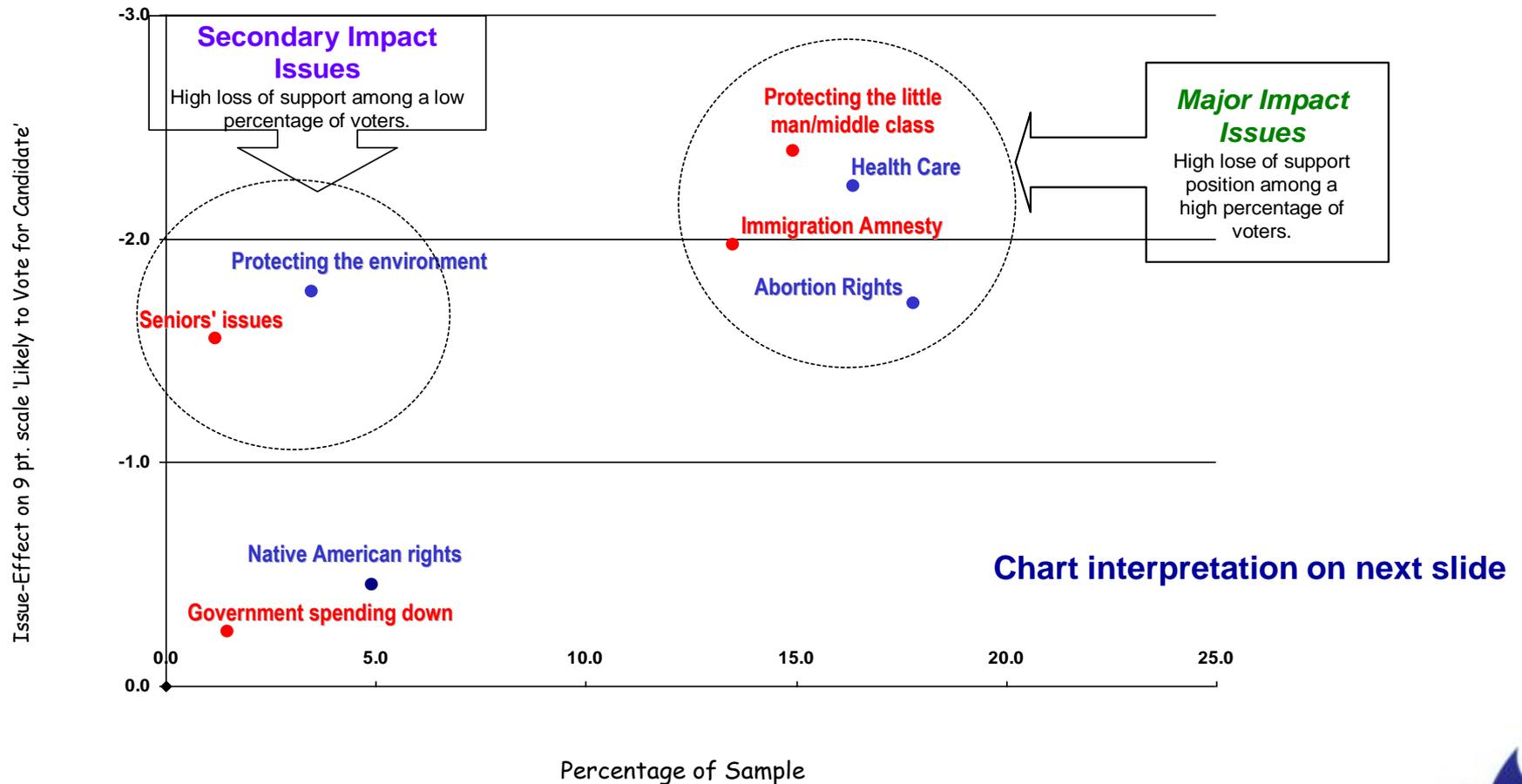


Chart interpretation on next slide



ISSUES AND THE GAIN / LOSS OF SUPPORT

- **Issue-Effect Measures the Loss of Support** — We measure the mean of 'Likely to Vote for Candidate' if the respondent thinks the candidate is either too right or left- leaning on an issue vs. 'Agree with candidate'.
 - **Y-axis:** Difference in mean from 'Too progressive/right-of-center' and 'Likely to Vote for Candidate'.
 - **X-axis:** Percentage of voters who think Candidate is 'Too progressive/right-of-center'.
- **Chart Interpretation:**
 - **Top Right: Major Impact Issues.** Strong opposition to the Candidate's position among a high percentage of voters.
 - **Top Left: Secondary Impact Issues.** High loss of support among a low percentage of voters.



ISSUE EFFECT ANALYSIS – SURVEY QUESTIONS

- **The analysis must contain an ‘Intend to Vote’ or ‘Favorability’ rating of for the congressional candidate Liz Anderson:**
 - On a scale of 1-to-9, how likely are you to vote for Liz Anderson?

- **Next, the candidate is rated on a number of issues. Below are some examples:**
 - On the following issues, please rate Liz Anderson:
 - Ensuring everyone has access to affordable health care
 - Protecting the little man and middle class
 - Protecting the environment
 - Immigration amnesty
 - Abortion rights
 - Native American rights
 - Seniors’ issues
 - Keep government spending down
 - Is she...
 - 5) Far too right-of-center?
 - 4) Somewhat too right-of-center?
 - 3) Agree with her position?
 - 2) Somewhat too progressive?
 - 1) Far too progressive?



STRATEGIC MESSAGING



USING VOTER ISSUE PREFERENCES

Strategic Regression Analysis - Linear Regression:

- **Analyzes –**
 - Issue importance
 - Message acceptance
 - Statement agreement ratings
- **Measures –**
 - Which issues drive voter preference

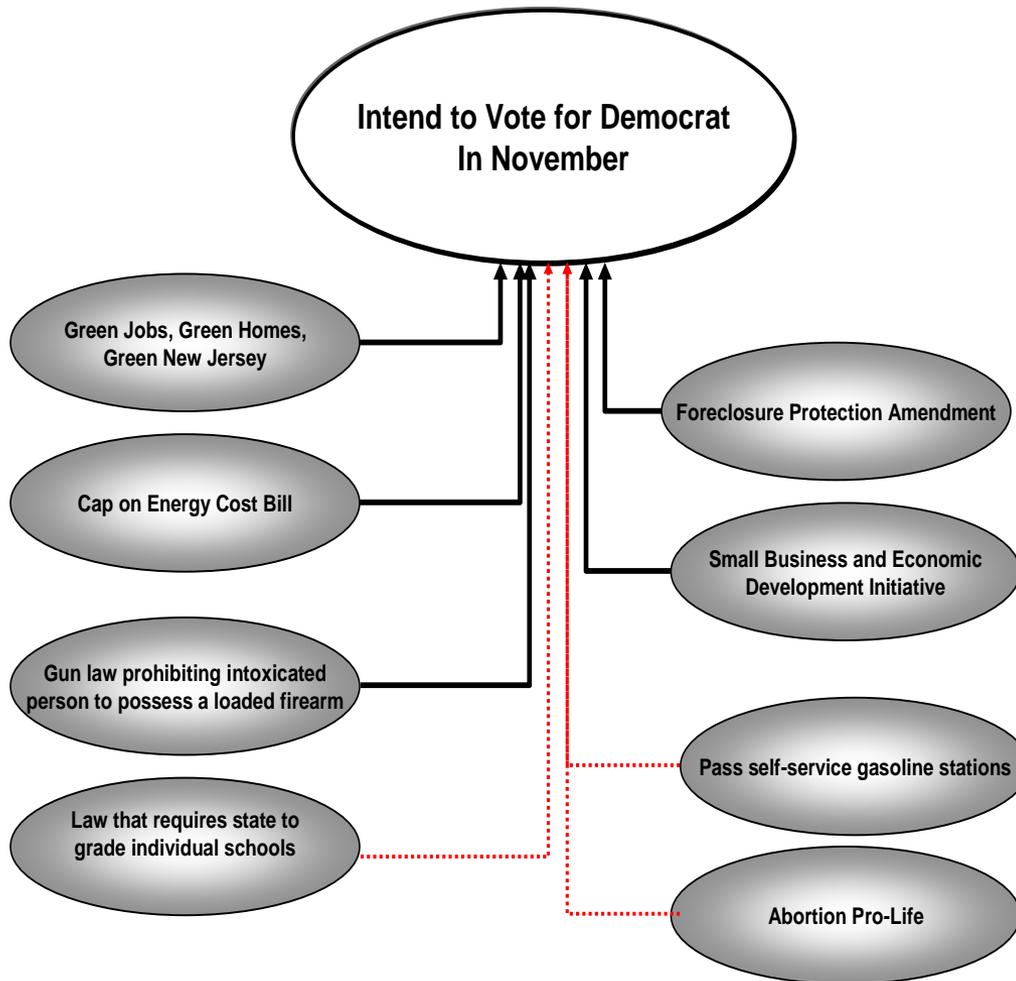


STRATEGIC MESSAGING – TURNING INFORMATION INTO ACTION

- **This analysis enables you to take informed, timely action to:**
 - **Headline your anchor issues**
 - **Promote your candidate**
 - **Defend your turf**
 - **Attack the opponent's base**
 - **Promote 'wedge' issues and move them into your sphere**
 - **Find the 'switch' issues that lead voters to choose your candidate.**



USING STRATEGIC REGRESSION TO IDENTIFY KEY ISSUES TO PROMOTE OR ATTACK (DEM.)



Issue Strength:

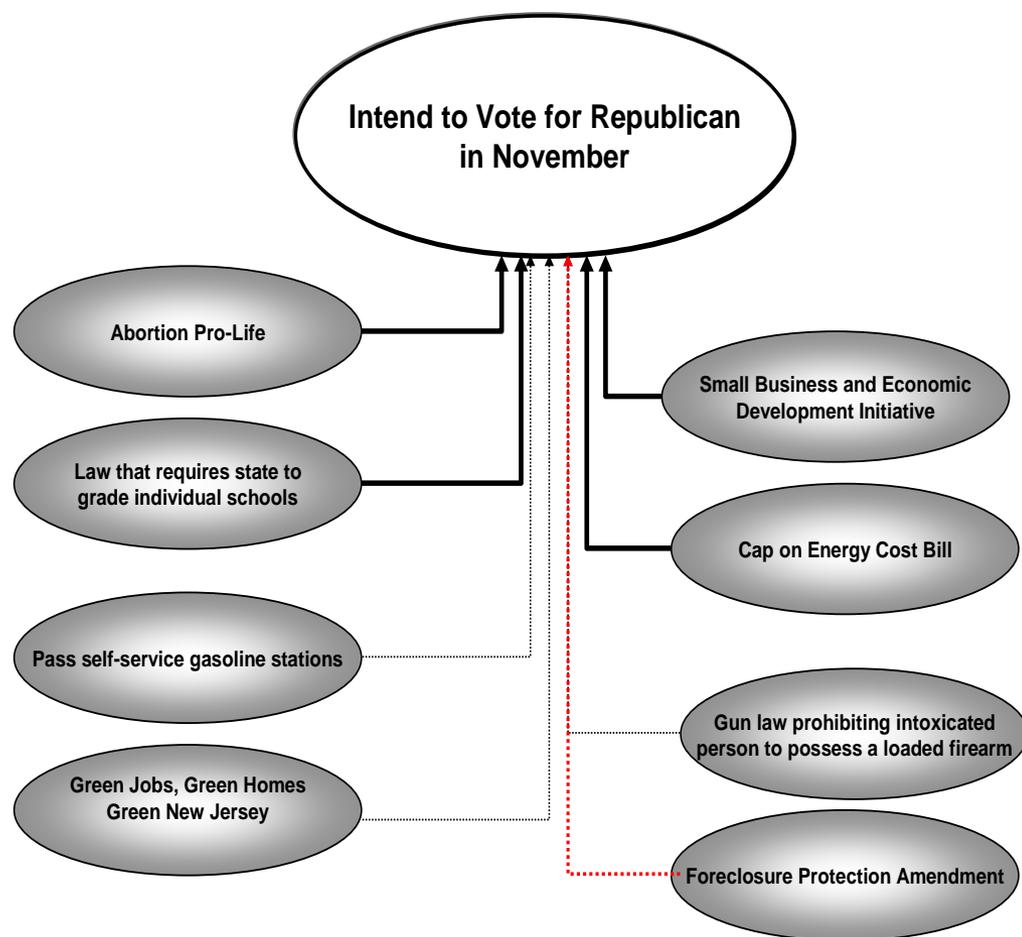
- We use Regression Analysis to measure the impact of campaign issues on intention to vote for a party or support an initiative.
 - **Solid Black:** Statistically significant key drivers to support.
 - **Dotted Red:** Statistically significant negative supporters. Best way to interpret, place a [NOT] in front of the issue.
- **Strategy is to promote:**
 - Green New Jersey, Foreclosure Protection, Cap on Energy Costs.
 - NOT Pro-Life, School Grades, and Self-service Gasoline.



USING STRATEGIC REGRESSION TO IDENTIFY KEY ISSUES TO PROMOTE OR ATTACK (REP.)

Opponent Regression Analysis

Assume you are the Democrat analyzing the Republican's issues.



▪ Defend

- Cap on Energy Costs, Small Business (key driver for both parties) emphasizing “We are better than the Republicans on these issues”.

▪ Attack

- Focus on “Republicans are against foreclosure protection and don't care that an intoxicated person can have a loaded firearm (key driver for the Democrats – insignificant with Republicans)”.



HOW TO CHANGE VOTER'S POSITIONS – SURVEY REGRESSION

If the general election for were held today, would you vote for?

- The Democrat candidate
- The Republican candidate
- Third-Party candidate
- No one
- Undecided

Please tell me who you think would do a better job on each of the following issues for the state:

	<u>Republican</u>	<u>Democrat</u>	<u>Neither</u>	<u>Undecided</u>
Cap on Energy Cost Bill				
Foreclosure Protection Amendment				
Small Business and Economic Development				
Green Jobs, Green Homes, Green New Jersey				
Gun law prohibiting intoxicated person to possess a loaded firearm				
Pass self-service gasoline stations				
Law that requires state to grade individual schools				
Abortion Pro-Life				

Survey Structure

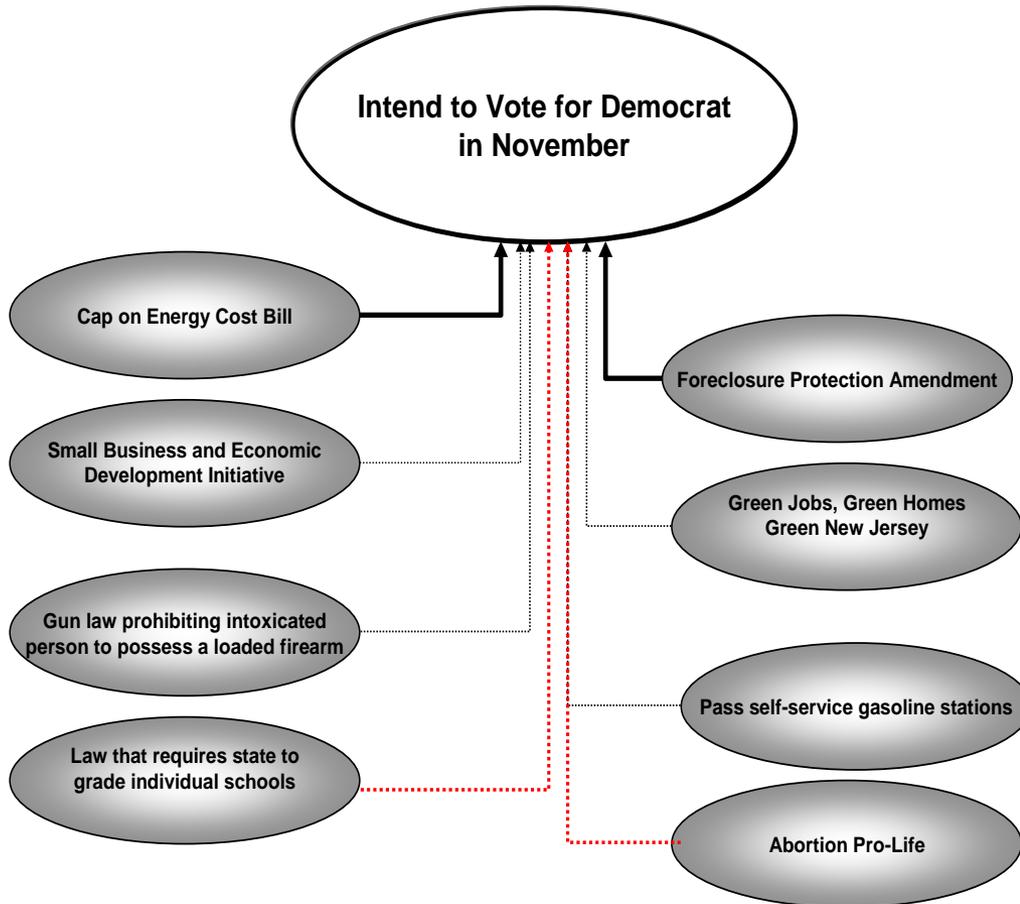
- Recode the issues to 'Democrat Better' (1/0) and 'Improvement in Democrat Support' between the two 'Vote' questions. Run the regression.

Now, if the general election for were held today, would you vote for?

- The Democrat candidate
- The Republican candidate
- Third-Party candidate
- No one
- Undecided



HOW TO CHANGE VOTER'S POSITIONS – STRATEGIC MEASUREMENT



The Switch:

- The importance of this analysis is that by asking respondents if they support your candidate, then asking them to rank a series of statements, and then asking them about support level again, we can tell you what caused voters to *change their minds* to support your candidate.

You Should Promote:

- Cap on Energy Costs.
- Foreclosure Protection.



ISSUE CHOICE – HOW VOTERS PRIORITIZE

The Issue-Relevance Scaling Issue Choice survey:

- **Measures –**
 - We measure voter choice and trade-off, instead of typical rating scale responses.
- **Evaluates –**
 - Multiple sets of four to six attributes.
 - For each set of attributes, the voter indicates which items are the most important item and the least important to them.
- **Enables the campaign to understand –**
 - Issue prioritization
 - Product benefits
 - Brand preferences
 - Voter needs
 - Attitudes



A SAMPLE ISSUE-RELEVANCE SURVEY

- Which of these 4 statements is *Most Important* in the upcoming gubernatorial election?
- Which of these 4 statements is *Least Important* in the upcoming gubernatorial election?

This exercise will be shown 8 times, with rotating issues in each.

Least Important	Factor	Most Important
	Lack of leadership	x
	Ferry system	
	Outside interference in Alaska business	
x	Special treatment given to natives	

Least Important	Factor	Most Important
	Ferry system	
	Unwise/wasteful government spending	x
x	Moral decline	
	Workers' compensation laws	

Issue Relevance Scaling:

- State Senator Karri Sandberg is running for Governor of Alaska. The Sandberg campaign wants to assess the importance of Alaska state issues.
- We use Issue Relevance Scaling to help the campaign determine which Issues concern most Alaskans.

Issues:

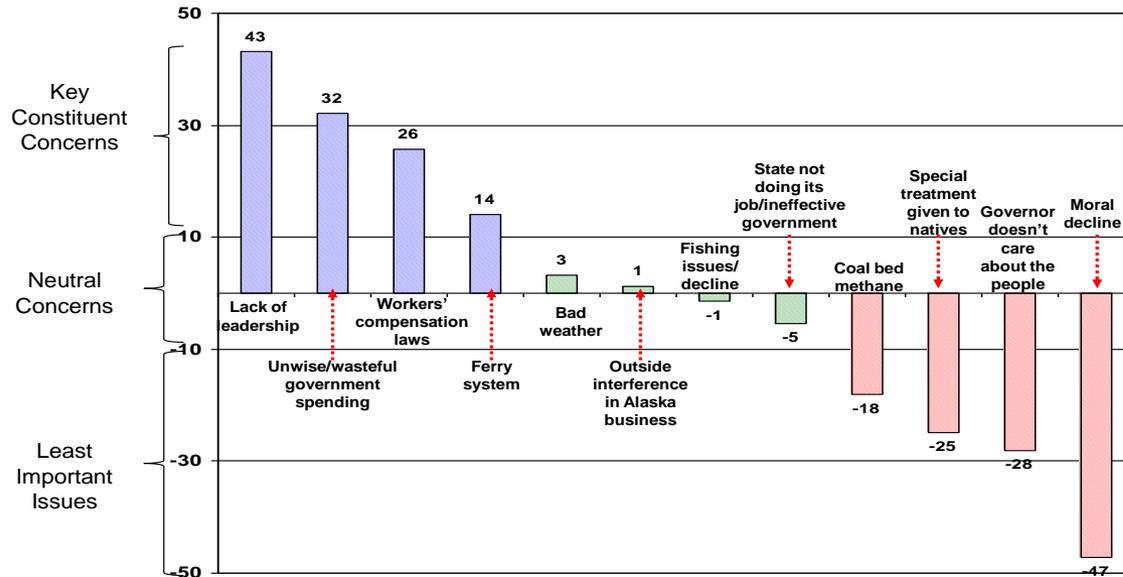
- *Unwise/wasteful government spending*
- *Outside interference in Alaska business*
- *Lack of leadership*
- *Fishing issues/decline*
- *State not doing its job/ineffective government*
- *Bad weather*
- *Special treatment given to natives*
- *Workers' compensation laws*
- *Governor doesn't care about the people*
- *Ferry system*
- *Coal bed methane*
- *Moral decline*



STRATEGIC MESSAGE RELEVANCE – POSITIONING THE CANDIDATE

Issue Relevance Means

Strategic Message Mean Scores



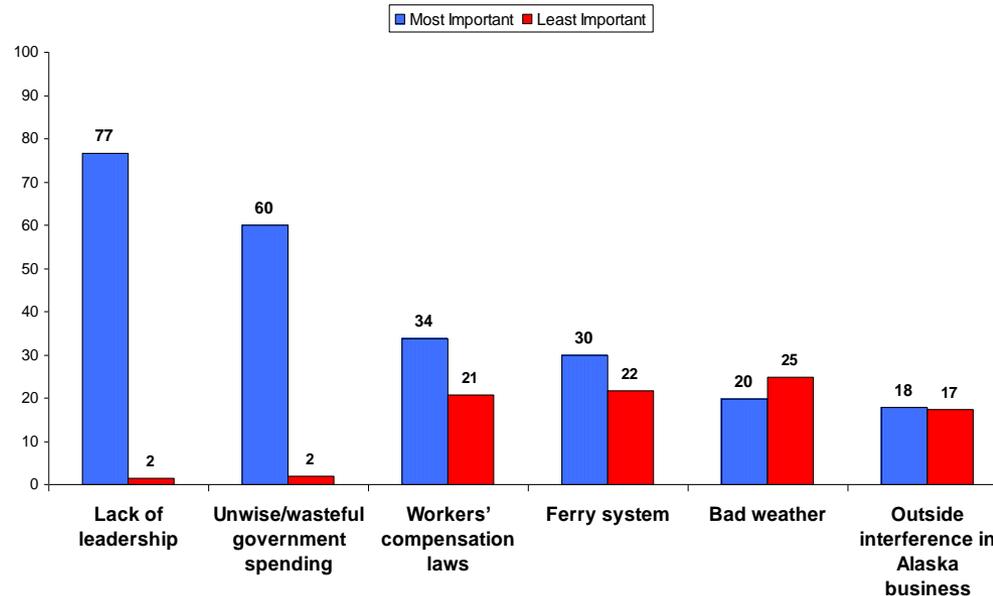
Strategic Conclusions:

- Voters are looking for a strong leader who is prudent with their money, protects the workers of Alaska, and will ensure that the Alaska's ferry system continues to run.
- Not many votes will be lost due to bad weather, federal policies, native special treatment, or highlighting 'moral values'.



ISSUE RELEVANCE ANALYSIS

Issue Relevance Analysis
'Most Important' vs. 'Least Important' Percentage



The larger the contrast between 'Most Important' (blue), and 'Least Important' (red), the more desirable the attribute.

Contrast Charts: The Contrast Chart is a clear way to describe the results of Issue Relevance Research – it shows at a glance which are the primary 'Most Important' contrasted with 'Least Important' issues.



MEASURING THE IMPACT OF INDIVIDUAL ISSUES ON THE VOTE – CHOICE MODELING



MESSAGE COMBINATION ANALYSIS

- **Political Conjoint Analysis:**
- **Measures –**
 - Measures the effects of *combinations of messages* on voters.
 - Reveals which messages are the most relevant for a given voter group or micro-trend.
- **Example –**
 - Conjoint messaging applied to Hispanic voters may have significantly different results than the same analysis applied to African-American voters.
- **Helps the campaign –**
 - Prioritize policies.
 - Target specific groups of voters.
 - Assess voters' concerns at different points in the election cycle.
 - Gauge the strength of a mix-of-positions combination.



ISSUE IMPORTANCE CHART

Message Conjoint

Importance of Issues on Livingston Approval Rating

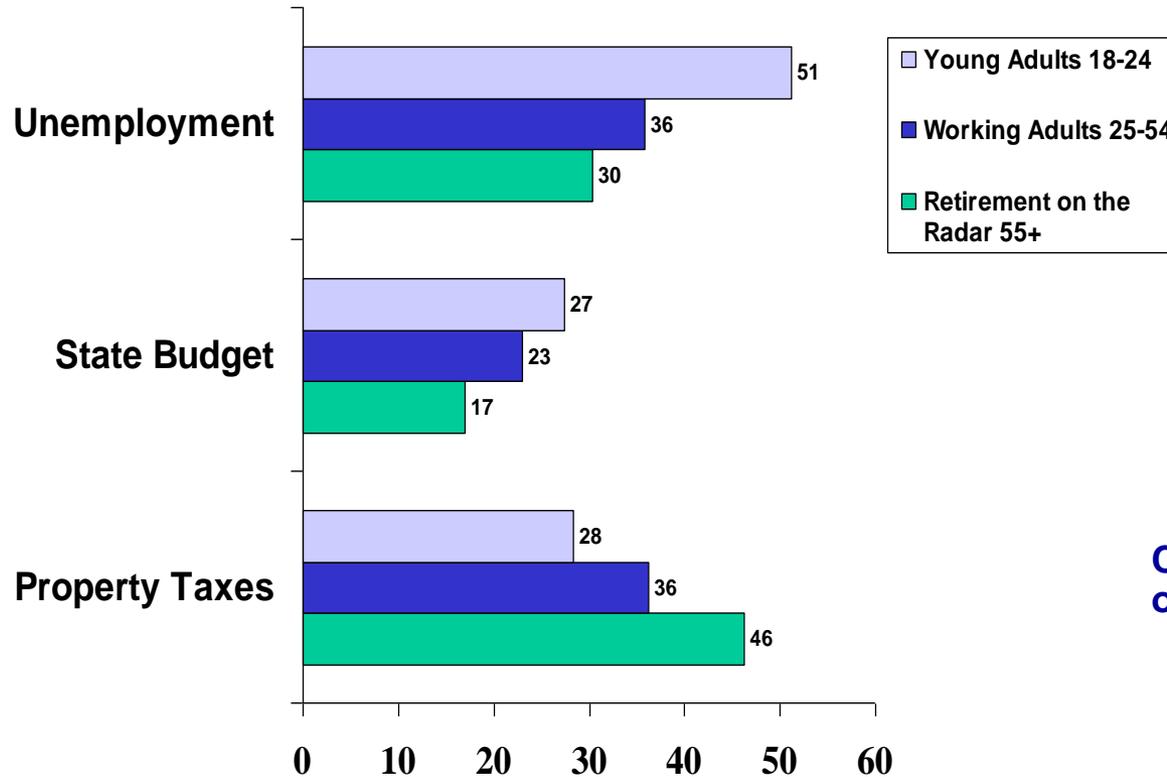


Chart interpretation
on next slide



ISSUE IMPORTANCE IDENTIFICATION

▪ First Usage

Which of these 3 issues are causing voters the most concern? By testing the issues, we help the campaign identify which sets of issues are most important to which groups of voters, so that the campaign can target specific groups with the most effective messages –

- **Unemployment:**
 - 2%
 - 4%
 - 6%
- **Property Taxes:**
 - Low
 - Medium
 - High
- **New Jersey Budget:**
 - Balanced Budget
 - State Budget Deficit of \$5 Billion
 - State Budget Deficit of \$10 Billion

▪ Survey Design

For each survey question, one level of each issue is included:

- “On a 1-to-10 scale, how would you rate the New Jersey State government under Governor William Livingston if unemployment is at 2%, property taxes are high, and the budget deficit is at \$5 billion?”
- “On a 1-to-10 scale, how would you rate the New Jersey State government under Governor William Livingston if unemployment is at 6%, property taxes are medium, and the budget is balanced?”



ISSUE ADVERTISING IMPACT CHART

Message Conjoint Issue Impact on Advertisement

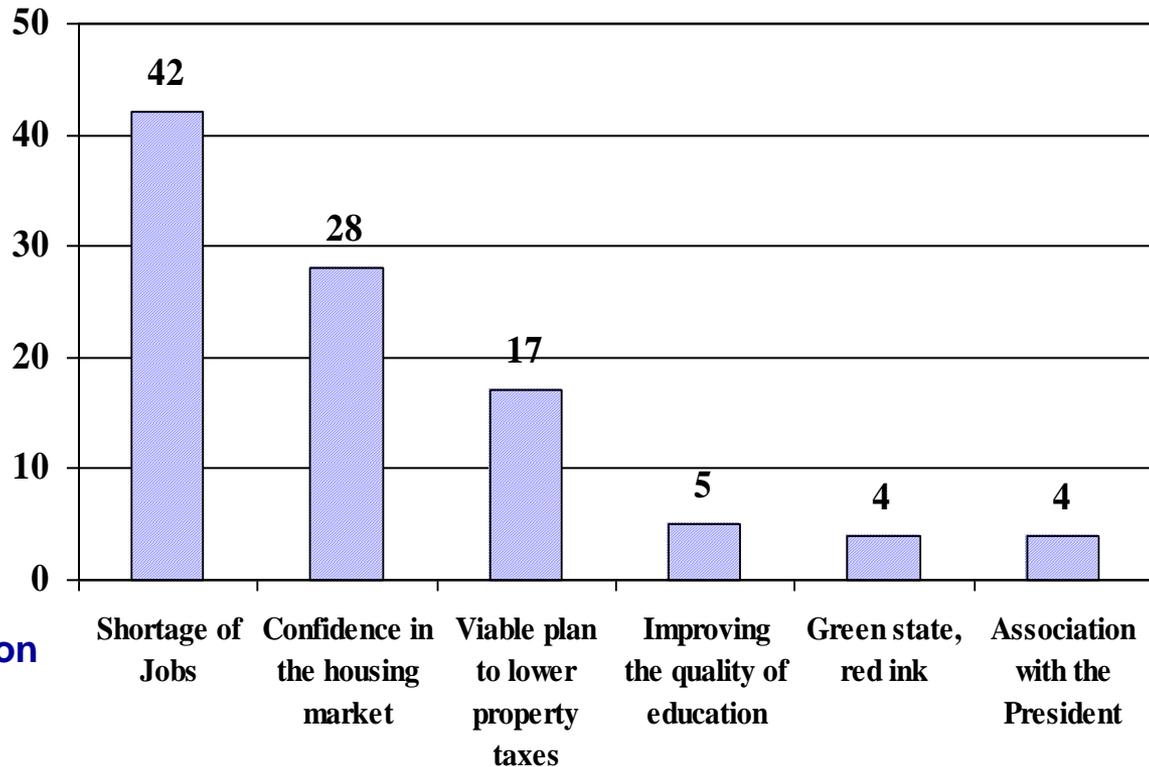


Chart interpretation
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PRE-TESTING ADVERTISING EFFECTIVENESS

Second Usage

- The campaign wants to test several messages. Among them:
 - Confidence in the housing market
 - Shortage of jobs
 - Viable plan to lower property taxes
 - Improving the quality of education
 - Green state, red ink
 - Association with the President

Survey Construct

- For each survey question or ad displayed, a combination of three messages is shown:
 - Messages Shown: 'Confidence in the housing market', 'Viable plan to lower property taxes', 'Green state, red ink'.
 - Messages Shown: 'Short of jobs', 'Improving the Quality of Education in the State', 'Association with the President'.
- Voter response is measured through hand held dials, in focus groups, or by asking respondents to rate the advertisement.

Relative Strength

- The chart shows the relative impact of campaign ads focusing on each issue on different voter groups.
- Conjoint Message analysis is fast and can measure several vary voter groups simultaneously.



POLITICAL SEGMENTATION



MESSAGE SEGMENTATION

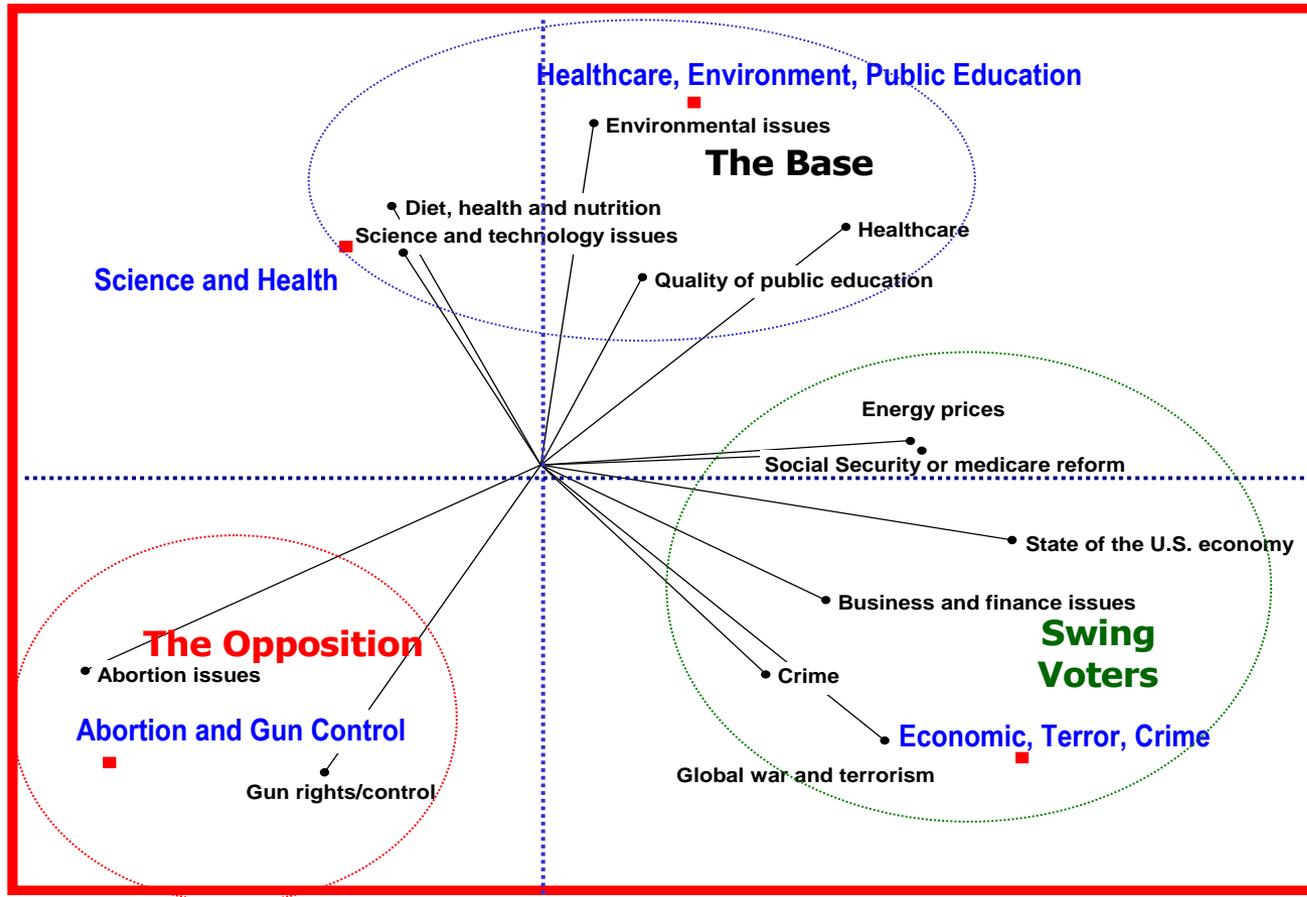
Political Segmentation Model

- **Identifies –**
 - The most high-value and persuadable target Voters (“the swing”).
 - Positioning and messaging that motivates them.
 - The campaign’s loyal “base”.
 - The “opposition” who will likely never buy into your candidate's message.
- **Enables the campaign to –**
 - Identify and persuade swing voters.
 - Strengthen its base.
 - Maximize ROI for strategic communications.



IDENTIFYING KEY ISSUES – CHART

Issue Factor
Survey Chart;
interpretation
on next slide



KEY ISSUES – FACTOR SURVEY ANALYSIS

Political Segmentation Model – Issue Factor Survey Design

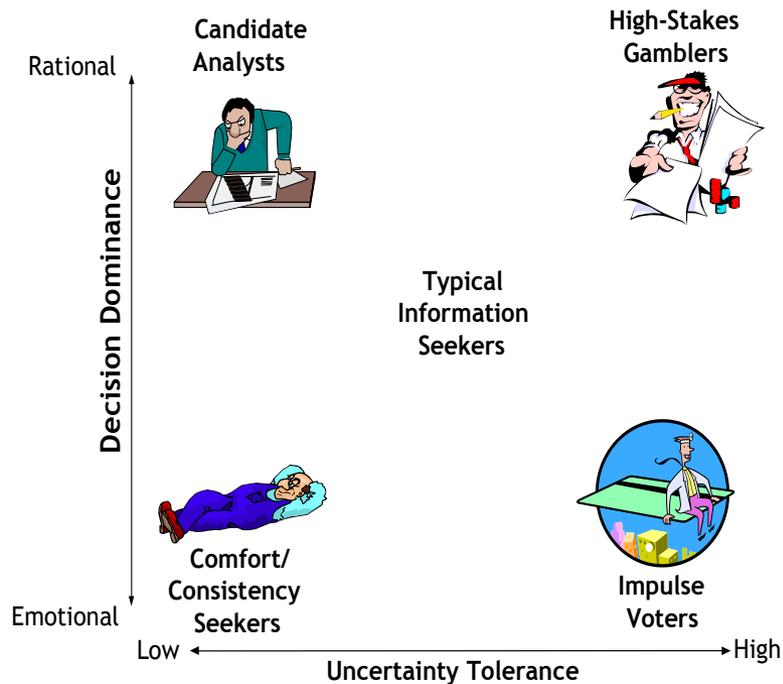
- Respondents were asked to rate a series of thirteen questions, ‘When Voting In a National Election, How Much Influence Will Each Of The Following Issues Have On Who You Decide To Vote For’, on a seven point scale.
- Comparing the top box (6,7) percentages, Global War on Terrorism (72%), Healthcare (66%), and State of the U.S. Economy (63%) top the list.
- **We can now see how these particular attributes cluster together.** Factor Analysis identifies underlying variables (factors) by grouping attributes or variables into ‘families’ – called factors.
- When mapped, the clusters clarify and can be cross referenced by the base, opposition, and swing voters.
 - The candidate know knows what to say to each.

Sample: Likely General Election Voters



VOTE BEHAVIOR MODEL

VOTE Segment Overview



VOTE Behavior Segments

- VOTE segments are a low-tech measure that captures voting style.
- On a scale of 1-to-5, how much do you agree with the following statements?
 - I may not know a lot about a candidate before I vote for him, but that is okay.
 - It would really bother me if I didn't understand what the candidate stood for.
 - I vote for the candidate who is most in line with my core issues.
 - Image always determines who I vote for.
 - I don't have a problem changing my opinion about who to vote for.

Sample: Likely General Election Voters



MICRO-TARGETING – TAILORING MESSAGES



POLITICAL MICRO-TARGETING

Micro-targeting is the use of direct marketing, data-mining techniques with predictive market identification analyses such as discriminant analysis and logistic regression.

- **Results:**
 - Tracks individual voters
 - Identifies potential supporters

- **Methodology:**
 - Surveys
 - Examine data to identify sub-groups

- **Use:**
 - Tailor messages to targeted sub-groups

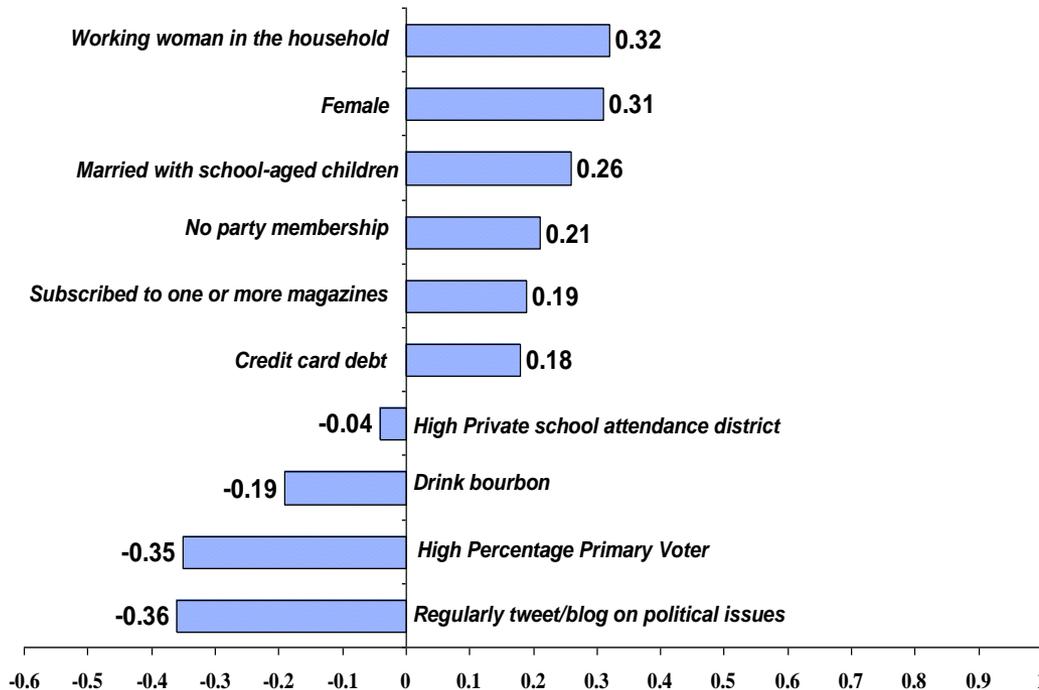


FINDING THE SWING VOTER

Looking for the 'Swing' Voter Greater Las Vegas Metro Area

Discriminant analysis

- We use this technique, based on consumer and political characteristics, when the campaign wants to build a descriptive model of a likely 'swing' voter.
- This example shows how clearly we can help the campaign distinguish between 'Swing' and 'Decided' voters in the greater Las Vegas Metro area.



Key Factors in Building a Voter Profile: A range of characteristics is used in identifying 'Swing' voters. For example, women who work, have a family, are not affiliated with either party, and read magazines have a higher likelihood of considering themselves to be 'undecided' on election day. Men who drink bourbon, vote in primaries, and blog are far more likely to have already made up their minds for whom they will vote.



IDENTIFYING YOUR BASE

Logistic Regression

Regression Output	Regression Beta	Sig.	Odds Ratio
Gender 1=Male 2=Female	2.670	0.029	14.440
Marital Status 1=Married/0=Not Married	2.095	0.015	8.126
College Graduate 1=Yes, 0=No	1.800	0.120	6.050
Working Woman in House 1=Yes, 0=No	1.762	0.038	5.826
Urban 1=Urban, 0=Not urban	1.649	0.024	5.202
Housing 1=Own, 0=Rent	0.800	0.506	2.226
Credit Card Debt 1=Yes, 0=No	-0.860	0.252	0.423

- Identifies whether a person will 'Vote' or 'Not vote'; or 'Vote for my candidate', 'Not Vote for my candidate'.
- Identifies a variable 'Outcome – Vote for Liz Anderson'.
 - Outcome = 1 If 'The Individual Is Likely to vote for Liz'; or Outcome = 0 If 'The Individual Is Not Likely to Vote for Liz'.
- The outcome shows only these *two possible values*.

Strategic Note:

Logistic regression should be used in situations when a campaign would like to ascertain which voters are:

- Likely Voters.
- Inclined to vote for their candidate.
- 'Undecided'.
- Donor possibility.



FINDING YOUR BASE – DEMOGRAPHIC SIMULATION

Vote for 'Liz' Logistic Regression			
Regression Output	Answer	Regression Beta	Sum (b*c)
Gender 1=Male 2=Female	2	2.670	5.340
Marital Status 1=Married/0=Not Married	1	2.095	2.095
College Graduate 1=Yes, 0=No	1	1.800	1.800
Working Woman in House 1=Yes, 0=No	1	1.762	1.762
Urban 1=Urban, 0=Not urban	1	1.649	1.649
Housing 1=Own, 0=Rent	1	0.800	0.800
Credit Card Debt 1=Yes, 0=No	0	-0.860	0.000
Sum			3.446

Odds Ratio ($1/(1+e^{-z})$)	0.97
(Chances to 'Vote for Liz')	97%

Odds-ratio:

- When a respondent's choices are set within the regression model, an 'odds-ratio' for each respondent is created using the formula of $1/(1+e^{-z})$.
- 'Z' is the outcome of the regression equation once all the questions are input.
- A simulator can be used to classify individuals based on demographic data or a survey screen.



FINDING YOUR BASE – MODELING

Vote for 'Liz' Logistic Regression			
Regression Output	Answer	Regression Beta	Sum (b*c)
Gender 1=Male 2=Female	1	2.670	2.670
Marital Status 1=Married/0=Not Married	1	2.095	2.095
College Graduate 1=Yes, 0=No	1	1.800	1.800
Working Woman in House 1=Yes, 0=No	1	1.762	1.762
Urban 1=Urban, 0=Not urban	1	1.649	1.649
Housing 1=Own, 0=Rent	1	0.800	0.800
Credit Card Debt 1=Yes, 0=No	0	-0.860	0.000
Sum			0.776

Odds Ratio ($1/(1+e^{-z})$)	0.68
(Chances to 'Vote for Liz')	68%

Odds-ratio:

- Using the logistic output, the chances of a college educated, urban, working, married woman who owns her own home and has no credit card debt voting for Liz Anderson is .97, or 97% (previous page).
- The chances of a college educated, urban, working, married man who owns his own home and has no credit card debt voting for Liz Anderson is shown (above) at .68, or 68%.
- Given that in her district, 58% of likely voters are women, Liz Anderson has a clear advantage over a male opponent.



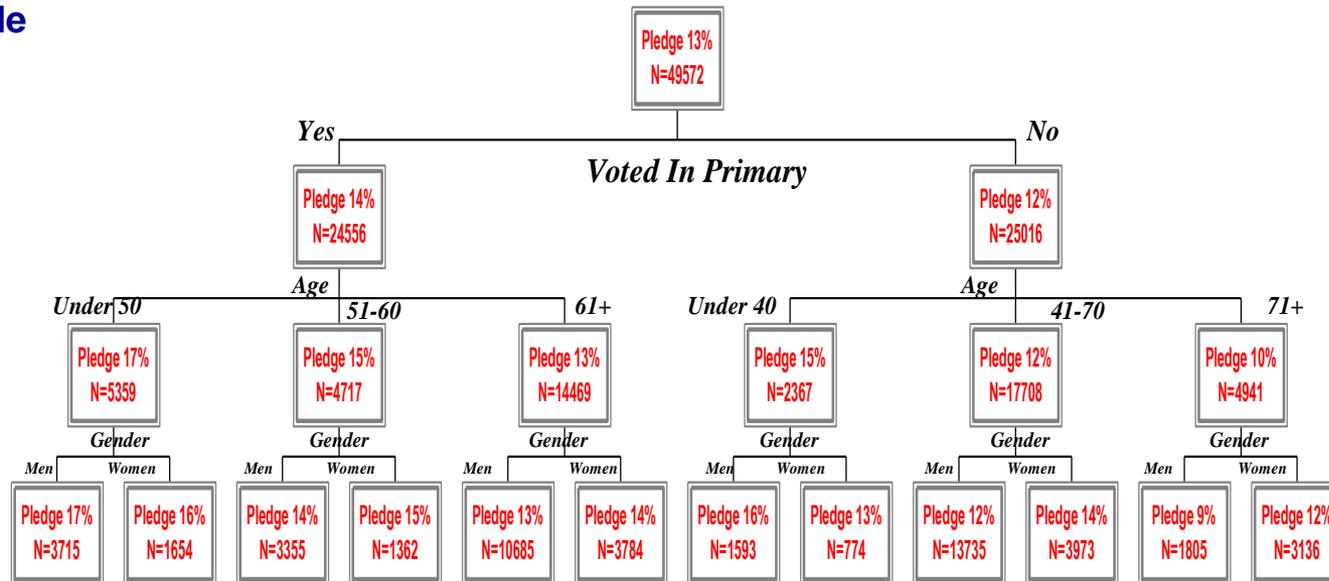
IDENTIFYING LIKELY CONTRIBUTORS

Chi-Square Decision Tree

Made Pledge to the State Political Party

Chart interpretation on next slide

Made Pledge to the State Political Party



IDENTIFYING LIKELY CONTRIBUTORS – EXPLAINING CHAID TREES

How we use the CHAID Tree Technique

- Each box contains a percentage of the Money Pledged and the number of individuals in the sample.
- The Top Box has a Pledge=13% with a sample size N=49,572. This means that there were 49,572 people in the sample (top box is the entire sample), and that 13% of them made pledges.
- **First Level** CHAID then finds the predictor with the best *breaks in percentages among the top box*.
 - Voted In Primary, is the top predictor. Those who voted in the primary had a pledge rate of 14%, while those who did not (right box) had a pledge rate of 12%.
- **Next Level** ‘People Who Voted in the Primary Under the Age of 50’ had a pledge rate of 17%. The next box, ‘People Who Voted in the Primary Age 51-60 had a pledge rate of 15%, and so on.
- We continue the analysis until we can provide the campaign with a clear profile of the “most likely Contributor”.



ABOUT THE AUTHOR

Michael Lieberman is president of *Multivariate Solutions*, a statistical consultancy which serves campaigns and major polling firms by providing effective campaign planning, issue identification and communication strategies, focused polling, micro targeting of voters and identifying likely contributors.

Mr. Lieberman has over 20 years of experience winning campaigns for local, state and presidential elections as well as prime ministers internationally, and has contributed articles to political publications including *Politics Magazine* and *Campaigns and Elections Magazine* on topics such as political branding, swing voters, the segmentation of issues impacting voting choice, and how attitudes towards government match up with green beliefs.

Mr. Lieberman has taught statistics and market research at *City University of New York* and the *University of Georgia*. Mr. Lieberman holds a B.A. degree in Mathematics from Rutgers University, an M.A. degree in International Affairs from George Washington University, and an M.S. degree in Statistics from Rutgers University.

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Objectives	Analytical Techniques	Results
Setting the Agenda	Stated Vs. Derived Importance	Identifies voters' key issues. Identifies Must-Have issues which retain the base. Finds Wedge Issues.
Defining the Candidate	Top Of Mind Vs. Aided Candidate Awareness	Defines Name Recognition vs. Opponents.
	Correspondence Maps	Discovers hidden issues associated with candidate. Ranks importance of issues. Identifies candidate strengths and weaknesses.
	The Issue Matrix	Defines Strengths, Target Issues, Secondary, and Low Priority Issues for each candidate.
	Competitive Issue Targeting	Identifies Weaknesses, Parity Issues and Leverageable Strengths of your candidate.
	Issue-Effect Measurement	Predicts Gains and Losses of Support from issue positions.
Strategic Messaging	Strategic Regression	Demonstrates what causes voters to change their minds.
	Issue-Relevance Scaling	Ranks importance of issues to voters.
Voter Choice Modeling	Political Conjoint	Finds best messages for voter sub-groups.
	Advertising Effectiveness	Compares effectiveness of messages on different voter sub-groups.
Political Segmentation	Principle Components Analysis	Finds Swing Voters.
	Issue Factor Survey	Matches issues to the Base, the Opposition, and the Swing.
	Vote Behavior Model	Differentiates individual voter's styles.
Micro-targeting: Key Voter Groups and Contributors	Predictive Market Segmentation	Demographic identification of your base and potential supporters.

