

PMGT 219 – Targeting, Microtargeting and Analytics

DRAFT

Summer Semester, 2009

Tuesdays, 7:10 – 9:30

COURSE DESCRIPTION:

A technical, hands-on course on using technology for microtargeting and analytics. Starting with a detailed review of traditional targeting techniques, this course will move on to consider the theory, mathematics, and behavioral science behind microtargeting. Topics include data collection and analysis, survey development, database construction, practical sources and uses of data in mobilization, messaging, and fundraising, and privacy and security. PGMT-202 Research Methods is a prerequisite for this class.

COURSE OBJECTIVES:

Students will:

- To teach the strategies, techniques and mindset of precision delivery of messages to finite populations;
- To develop effectiveness and efficiency in political messaging;
- To improve understanding of two-way, interactive communications with groups within the general populations such as constituents, voters, supporters, neutrals and opponents; and
- To develop an appreciation of the potential for manipulative abuse in highly targeted communications with citizens.

COURSE REQUIREMENTS:

Rather than a final examination or a longer term paper, the course will entail a short, written assignment each week in response to a series of “case study” based assignments. In the first part of the course, students will be expected to come to each class with a targeting analysis based on different approaches or techniques. Later in the summer semester, these written assignment will become more analytical than practical work projects. Given the shortness of the summer semester, students will be expected to attend all class session.

The final grade will be awarded based on the following formula: 30% for the targeting applications based on the case study datasets; 30% for the analytic papers; and 40% for in-class presentations and participation.

BOOKS FOR PURCHASE: (from Amazon.com):

Mark Penn and E. Kinney Zalesne, *Microtrends: The Small Forces Behind Tomorrow's Big Changes* (New York: Hatchet Book Publishing, 2007).

ONLINE RESOURCES:

Michael Cornfield, “Maximizing microtargeting,” *Campaigns & Elections Magazine*

Hal Malchow, "The New Political Targeting," Campaigns and

David Weigel, "The political bull's-eye: persuading the right people with microtargeting,"
Campaigns & Elections Magazine.

CLASS SESSIONS:

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| 1. | May 19 | Introduction and the Basics of Targeting |
| 2. | May 26 | Survey Based, Demographic Targeting |
| 3. | June 2 | Cluster Based Targeting |
| 4. | June 9 | Behavioral and Value Based Targeting |
| 5. | June 16 | Database Design |
| 6. | June 23 | Sources of Census, Demographic, Behavioral & Value Based Data |
| 7. | June 30 | Database Merger Operations |
| 8. | July 7. | Techniques of Microtargeting |
| 9. | July 14 | Using Microtargeted Analyses |
| 10. | July 21 | Summing Up |

SESSION ONE

MAY 19

- A. **Subject:** Introduction – Course Overview and Targeting Basics

The first class will start with an overview of the semester's work including course design, readings and requirements.

A majority of the class session will be devoted to a presentation of the basics of targeting using "past performance" data or turnout at the precinct level. Students will explore the differing concepts of variation in turnout and loyalty

Written assignments for next class: Case Study #1: Using municipal level data from the 4th Congressional District of Connecticut, develop an analysis of where a Democratic candidate for Congress should allocate resources by town. What areas should he campaign in? Where should GOTV efforts be concentrated?

SESSION TWO

MAY 26

Subject: Survey-Based, Demographic Targeting

An analysis of survey analysis techniques for allocating campaign resources toward different demographic groups based on marginal distributions and bi-variate analysis. Discussion will also include explicit comparisons with the precision of performance data and consideration of the assumptions inherent in probabilistic approaches to targeting.

Reading assignments for next class:

The Pew Research Center For The People & The Press “Evenly Divided and Increasingly Polarized: The 2004 Political Landscape” (Washington, DC 2004).

The Pew Research Center For The People & The Press “Mapping the Political Landscape, 2005” (Washington, DC 2005).

Written assignments for next class: Case Study #2: Students will analyze a dataset drawn from a recent Senatorial campaign including name recognition, candidate favorability, vote intention, demographics and media attending behavior. Bring to class an analysis of which groups of undecided voters should be given priority by the Republican candidate. Be prepared to present a description of your analysis during the class session.

SESSION THREE

JUNE 2

Subject: Cluster-Based Targeting

A discussion of the various techniques for factor analysis and cluster based analyses of survey data that provide the basis for targeting probabilistic groups of citizens, including factor analysis. A substantial part of this class will be devoted to an examination of the typology of voters developed by the Pew Research Center for the electorate in the 2004 and 2006 national elections.

Reading assignments for next class:

The VALS™ Program, “Understanding U.S. Consumers” (Menlo Park, California: SRI Consulting Business Intelligence, January 2008).

Written Assignment for next class: Case study #3: Draft a critique (4 pp. max) of the typology developed by the Pew Research Center for the electorate during the 2008 campaign, contrasting their predictions with exit poll data collected on actual turnout in the presidential elections in November of 2008..

SESSION FOUR

JUNE 9

Subject: Behavioral and Value Based Targeting.

A presentation of the VALs system of behavioral survey data as a basis for predicting political attitudes and voting behavior.

Reading assignments for next class:

Mark Penn and E. Kinney Zalesne, *Microtrends: The Small Forces Behind Tomorrow's Big Changes*, Chs. I, VI & Conclusion.

Written assignments due for next class: Case Study #4 (tentative pending access): Using the VALs study conducted for the 2008 Democratic candidate in the X Congressional District of California, analyze the success of the VALs predictive model against performance turnout from the CD's towns and cities.

SESSION FIVE

JUNE 16

Subject: Database Design

A presentation of the basics of database software and design issues combined with consideration of a deductive approach to targeting based on factual or perceptual data compiled on the individual level versus the inductive approaches based on probabilistic estimates inferred from grouped data.

Reading assignments due for next class:

Mark Penn and E. Kinney Zalesne, *Microtrends: The Small Forces Behind Tomorrow's Big Changes*, read 1/3 of book according to trends that interest you. .

Written assignments due for next class: Case Study #5: Design the requirements of a database for one of the two major, national parties by identifying classes of data that you would wish to include and the sources of data through which you might acquire these data. [Note: this is a planning exercise, students will not be expected to actually compile the proposed database.]

SESSION SIX

JUNE 23

Subject: Sources of Demographic, Behavioral and Consumer Data

The first half of the class will include a presentation by a panel of information vendors as to the information available for free (i.e. primarily the U.S. Census) and for purchase, followed by class discussion of the veracity of claims and the usefulness of these various sources for predicting political behavior.

Reading assignments due for next class:

Assignments due next week: Revise your database plan based on the class presentation of data availability and considerations of usefulness. Develop a budget that includes items needed for the entire operation: off-the-shelf software applications and reprogramming, data acquisition, machine processing, and necessary personnel.

SESSION SEVEN

JUNE 30

Subject: Merging Databases

One of the significant problems encountered by those working in this field entails merging several databases into one larger whole, including the technical issues of database design and the conceptual problems of bringing probabilistic data into sync with individual level information. Forewarned, political managers can sidestep some significant implementation problems by considering these issues at the front end.

Reading assignments due for next class:

Written assignments due for next class: Case Study #6: Students will be given access to several databases to achieve a merge and will then write an analysis of the anticipated problems and “work arounds” that would make it possible to achieve a useful whole.

SESSION EIGHT

JULY 7

Subject: Techniques of Microtargeting

A discussion of the utility of basing political strategies on social groups of less than 5% of the general population and the techniques for reaching those groups with persuasive messages.

Written assignments due for next class: None

Written assignment due for last class: Design a communications strategy based on microtargeted groups from the class database, including a delineation of at least three mini-groups or small constituencies and the vehicles for reaching them (direct mail, cable television advertising, email and Internet advertising. Include a brief sketch and explanation of the content of messages to be directed toward these three (or more) groups. The project should conclude with a discussion of your view of the ethics of microtargeted communications with small groups of citizens within the general population. Where does the line lie between manipulation and genuine interactive responsiveness in communications? What are the dangers of abuse in this approach to political messaging?

SESSION NINE

JULY 14

Subject. Using Microtargeted Data

A class discussion of the effectiveness and utility of microtargeting as a strategy of political communications and an analysis of the extent of differences in messaging that a campaign can reasonably deploy without complicating its overall appeal to the broad electorate through traditional channels of mass communications.

Reading assignments due for next class:

None

Written assignment due for next class: Final project; see assignment made during week #8 above.

SESSION TEN

JULY 21

Subject: Summing Up. A review and critique of the work product. Students will have an opportunity to question and discuss the efforts of other in the class. Consideration of the ethical dangers of microtargeting in political discourse and the potential for harm to political institutions. Criticism and suggestions for revising the course for future years will also be solicited.

Written assignments due this class: Final Project: The Microtargeting plan assigned in week #8.