

Persuasive Political Targeting: A Remarkably Understudied Dynamic

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Abstract

Technological developments have increased attention to an age-old political-persuasion technique: targeting. Surprisingly, research on the efficacy of persuasive political targeting is relatively scarce and scattered. In this paper, Druckman offers a clear definition of persuasive political targeting; synthesizes extant work by categorizing it based on source, message, or setting matches to receivers' characteristics; and provides a framework for future studies of persuasive political targeting.

In 1828, Andrew Jackson won the U.S. presidency. In doing so, he avenged his loss four years earlier when he won a plurality of the popular vote but lost the election due to a corrupt bargain between the runner-up (John Adams) and third-place finisher (Henry Clay). The 1828 election ushered in the national nominating convention, increased party organization, and the growing political power of the West. The campaign involved bitter attacks between the two candidates, Jackson and Adams; it also revealed a fascinating portrait of early campaign strategy. In the crucial state of Ohio, Jackson disseminated members of his campaign committee to travel through the state and assess voters' preferences and identities. Kernell (2000: 573) reports that "party workers dispersed across the electorate who assiduously sought out the candidate's supporters and escorted them to the polls with the party's ballot in hand." In short, campaign *sources*—party workers—targeted or matched the partisan identities of Jackson's supporters and ensured they were mobilized.

Fast forward 120 years to the 1948 election. The clear underdog, Truman engaged in a cross-country whistle-stop train tour that covered eleven states and 31,000 miles. The goal was to engage in personal conversations with individuals in small towns about their plight as working-class Americans. He emphasized plans to increase the minimum wage, fund low-cost housing, strengthen social security, and create national health insurance (Truman 1956). Truman (1955) explained, "I simply told people in my own language they had better wake up to the fact that it was their fight... I talked to them as human beings with real needs and feelings and fears...I, as President had genuine concern." Truman's concern also was strategic. He sent "observers" to each stop in advance to obtain information about local concerns (Karabell 2000). Truman matched the *setting* of his outreach—voters' local environments—to their daily economic experiences. Had he delivered his messages via national radio addresses, they likely would have

fallen on deaf ears. Instead, offering messages in the setting of voters' local lives matched the voters' daily worries. This allowed him to garner support, leading to an upset victory (Berelson et al. 1954).

The 1960s brought with it notable innovations in campaigning as candidates began to rely on private polling to identify messages that resonate best with their supporters (Jacobs and Shapiro 2000). During his 1980 campaign, Reagan's team relied on private polling to construct the conservative coalition. They identified potential constituencies and highlighted positions Reagan shared with them on key issues. This meant adopting positions on domestic policies that aligned with those of political independents, positions on economic policies that aligned with those of high-income Americans, positions on social policies that aligned with those of born-again Christians, and positions on foreign policy that aligned with those of base Republicans (Druckman and Jacobs 2011, 2015). Using *messages* that took positions matching those of receivers proved effective. This general approach has evolved with the profusion of the Internet and social media, as exemplified by the Cambridge Analytica scandal where a British consulting firm used personal data from millions of Facebook users to craft targeted political advertisements, including those for the 2016 Trump presidential campaign.

That persuasive political targeting occurs in politics is hardly surprising. Indeed, the essence of democratic politics is persuasion; elections, policy agendas, and institutional legitimacy all hinge on using persuasion to form supportive coalitions (Mutz et al. 1996, Druckman 2022). Politics also inherently involves competition and cooperation between individuals with varying ideologies, identities, and experiences. Consequently, political persuasion necessitates matching where potential supporters are targeted with approaches that resonate. What is surprising is that scholars have yet to provide a framework for studying the

effects of persuasive political targeting. Just over a decade ago, barely any research existed. As Hersh and Schaffner (2013: 520) explained, “Neither researchers nor campaigns yet know very much about how well targeting works at persuading voters.” In the decade since, there has been a smattering of papers on targeting, but they remain disconnected from one another, and there is no systematic research agenda. Given the centrality of targeting to political communication, as the historic examples make clear, it seems fair to say it is a remarkably understudied dynamic. My goal is to rectify this by offering a synthesis of disparate studies using the framework of personalized matching (Teeny et al. 2021). In the next section, I briefly motivate the focus and describe how I subsequently proceed.

Why Do Political Actors Engage in Persuasive Political Targeting?

Political actors of all types have incentives to persuade others—persuasion is power in politics. Even so, work on political communication rarely considers speakers’ motivations. This matters since different goals lead to varying strategies. Cionea et al. (2017) identify multiple goals in argumentation including objectively informing, persuasion/advocacy, self-expression, self-presentation, and mutual understanding. The most relevant ones in political contexts are advocacy where speakers try to move others’ attitudes toward policies, candidates, or groups; and self-presentation where speakers send signals of where they stand. Speakers advocate by using information or disinformation (van der Linden 2015), invoking emotions (Groenendyk 2019), sending implicit signals (Krupnikov and Ryan 2022), engaging in costly actions (Gerber 1999), sending cues (Lau and Redlawsk 2006), and so on. Others try to induce behaviors such as voting or campaigning by sending mobilizing messages (Gerber and Green 2000), applying social pressure (Gerber et al. 2008), or invoking personal responsibility (Bolsen et al. 2014). In terms of self-presentation, political speakers call attention to issues salient to their constituents

(Druckman and Jacobs 2015), emphasize their familiarity with the experiences of constituents (Druckman et al. 2009), and make policy promises (Bonilla 2022).

These examples reveal a host of persuasive strategies applied to a range of outcomes. While rarely explicit in these theories, persuasive political targeting plays a role. Teeny et al.'s (2021) conceptual framework for personalized matching provides a way to understand and organize work on persuasive political targeting. They (383) define personalized matching as “an alignment between some aspect of the message *recipient*” and the “*message* itself, the *source* of the message, [or] the *setting* in which the message is delivered” (italics in original). They point out that this has also been called segmentation, customizing, targeting, and tailoring. The most frequently used term in politics is “targeting,” and I use it interchangeably with personalized matching. To be clear, though, targeting in this context does not include identifying a key audience and sending them a general message, such as identifying potential voters and providing get-out-the-vote (GOTV) material (e.g., Arceneaux 2007, Hersh 2015). Matching or targeting, here, means a purposeful choice of the message content, source, or setting that aligns with a specific feature of the individual/audience. The GOTV messages would be matching if they employed a consideration that resonated *specifically* with the audience. This distinction is crucial as otherwise nearly all political persuasion—given its strategic nature—could be construed as “targeted.” Instead, it is only targeted, for my purposes, when there is an explicit match.

In what follows, I offer selective reviews of each of the three types of personalized matching in politics: message, source, and setting. As will be clear, some prior works invoke targeting as a theme, but others do not, reflecting the embryonic state of the literature. I follow Teeny et al. (2021) in structuring the discussion; however, it will be evident that I do not cover all the specific matched criteria they discuss, largely because many of them have simply not been

studied in political contexts. I conclude by offering a generalized framework for studying persuasive political targeting that envelopes parts of Teeny et al.'s (2021) work while also including some other considerations for political contexts. I also raise questions about how the next generation of research devoted to understanding persuasive political targeting should proceed. Targeting has long been recognized as a crucial part of political communication, and now it is time to formalize its study.

Message Matching

The aforementioned Cambridge Analytica scandal highlights matching where campaigns craft messages to align with personal characteristics of the recipient—that is, message-to-recipient matches. I proceed with three subsections: a review of distinct message-targeting approaches, a review of the quasi-targeting approach of priming, and a clarification about how to think of heterogeneities in political persuasion.

Message Characteristics

The bulk of work that invokes the term “political targeting” explores how speakers, such as political candidates or advocates (e.g., opinion leaders, interest groups, social movements) align parts of their messages to enduring features of the recipients including their social identities (e.g., race/ethnicity), morals or values (e.g., sanctity), public policy (issue) priorities, attitude function (e.g., affect), motivational orientation (e.g., to protect a social identity such as partisanship), and personality (e.g., extroversion).

A starting point for messages that invoke social identities is recognition that politics often requires forming heterogeneous coalitions. This means persuading people with diverse demographic backgrounds. Hence, an obvious strategy entails highlighting the receiver's group to signal matched interests. For instance, Jackson (2011) shows that messages emphasizing

Latino support for a Democratic gubernatorial candidate (in the 2006 California election) increased the candidate's support among Latino Republican and independent voters with strong Latino identities. Language also can be used: for instance, Spanish-language radio advertisements during congressional elections boost Latino turnout (Panagopoulos and Green 2011). Alas, matching messages to audience demographics introduces risk since the messages might be observed by those not in the targeted group (mismatched receivers) who consequently move in the opposite direction. Hersh and Schaffner (2013) show that, within parties, targeting to subgroups (e.g., Born-again Christians, Latinos) has scant persuasive effect, but it significantly backfires among those who are not members of those groups (mistargeted, exposed individuals). Similarly, Ostfeld (2019) shows that when White Democrats learn about Democratic outreach to Latinos, they become less supportive of Democrats. This mix of results suggests a complex targeting calculus insofar as it can generate support amongst those matched but opposition among those mismatched. Flores and Coppock (2018) find these simultaneous effects, showing Spanish language ads (relative to identical English ads) significantly increase support for congressional and presidential candidates among bilingual speakers but decrease support among monolingual English speakers. This becomes more complicated with the consideration of intersectional identities. Bonilla and Tillery (2020) show that upon receiving frames for the Black Lives Matter movement that tie in Black feminist and LGBTQ+ populations depress overall mobilization, particularly among Black men.

A potential antidote is microtargeting which entails using consumer data or demographics to personalize messages that need not explicitly mention identities. Tappin et al. (2023b) explore this in two phases. The calibration phase pre-tests many distinct persuasive messages on a public policy issue (the U.S. Citizenship Act, universal basic income). The messages include various

elements including appeals to values, expert opinions, and so on. They identified the match between the perceived persuasiveness of a given message and covariate profiles—that is, for a given set of demographics (e.g., age, gender, partisanship) and psychological variables (e.g., moral values) they identify which of 26 messages would be most effective. Then, in phase 2, they randomly exposed (different) individuals to the matched “microtargeted” message, an arbitrarily chosen naïve message, or the single-best matched message across profiles. They find, across two issues, the persuasive impact of micro-targeting is roughly 70% beyond that of the single-best message and 200% greater than the naïve message. That said, in a different context, using ads that touch on multiple issues (instead of a single focal issue) and distinct profiles (e.g., knowledge, race, education), the authors find the persuasive impact of microtargeting does not exceed that of using the single-best-message. Nonetheless, these results reveal the potential of targeting in an era of access to vast amounts of recipient personal data. Since the matching involves identifying the “best” message that need not explicitly reference receivers’ characteristics, the risk of backfiring decreases.

I grouped Tappin et al.’s (2023b) paper with identity targeting, but they also included values as part of their profiles in the single-issue experiment. This echoes research on messages that emphasize the morals or values held sacrosanct by the recipient. Graham et al. (2009) present evidence that liberals focus on care and fairness whereas conservatives often attend to loyalty, authority, and sanctity (also see Clifford and Jerit 2013). Lin (2021) studies the 2016 party conventions and finds Republicans tend to appeal to loyalty, authority, and sanctity while Democrats do not focus on one moral foundation over the others. Presumably, these targeted foci resonate with the constituents and make for more persuasive messages. Feinberg and Willer (2013) show that messages that frame environmental issues in terms of conservative values of

purity and sanctity lead conservatives who typically oppose environmental legislation to become more supportive (also see Wolsko et al. 2016, Feinberg and Willer 2019, DeMora et al. 2021). The authors (57) state, “moral appeals...tend to be more successful than non-moral appeals...especially when the moral principles invoked resonate with the individuals targeted by the appeal.” Luttrell et al. (2019) show that this is particularly the case when prior attitudes are moralized (e.g., believe recycling is a moral imperative). Value targeting extends beyond morals; for example, Campbell and Kay (2014) show that Republicans express more certainty in human-induced climate change when exposed to a free-market frame that suggests potential profit from green technology (as opposed to a frame emphasizing regulation). In this case, the policy solution coheres with Republicans’ ideological values (also see Cavazza et al. 2010).

Alas, as with most message matching, there is no guarantee of success (see Hernandez et al. 2023). Severson and Coleman (2015) find conservatives do not become more supportive of climate change mitigation policies when exposed to a religious morality frame or an economic efficiency frame. Doherty (2008) shows that candidates can garner support by employing values that do not necessarily match their constituencies (e.g., Democrats employ traditional morality arguments or Republicans employ egalitarian arguments). Peterson and Simonovits (2017) show that a candidate employing value-based justification (fairness) for a policy position (tax policy) does little to increase support of the candidate among those who share the position and diminishes support among those who do not—the addition of the value justification backfires.

In addition to identity and value matching, political speakers target messages to cohere with receivers’ issue positions or priorities, as detailed in the introductory example about Reagan’s campaign (e.g., Reagan took issue positions that matched those of the audience he targeted, such as low taxes, when addressing high-income voters). Another example comes from

Endres (2020) who explores the impact of a candidate (2012 Republican presidential candidate Mitt Romney) targeting voters with a message that highlights a shared policy position (e.g., on energy, healthcare, gun rights). He finds that this approach led those from the other party (Democrats) and independents to be more likely to not vote at all or to support the candidate (Romney). The policy position match cross-pressured these individuals, and consequently, they pivoted. Yet, when Republicans received mismatched messages (positions contrary to their own) they became somewhat more likely to abstain, suggesting a type of backlash. Grose et al. (2015) similarly show that constituents express more support for representatives who share their position on an issue (immigration); further, the candidate can counter the backlash of a mismatched position by expressing understanding of the other perspective, and not mentioning actions to pursue the incongruent policy.

An alternative issue-based strategy entails expressing a shared concern about a particular issue (i.e., issue salience). By focusing on issues or topics which voters care about, speakers such as candidates come across as aligned with voters' priorities (e.g., Sides 2006). Scholars have documented the strategic use of such targeting (e.g., Wagner and Meyer 2014), and shown that it attracts additional attention from other communicators such as the media (Hayes 2008, Meyer et al. 2017). Yet, there has been surprisingly little work that explores its effectiveness (although, see Ansolabehere and Iyengar 1994 who find no evidence for the approach).

Persuasive efforts are common not only for individuals such as candidates but also for groups. These assessments have affective bases: "how do you feel about another group?" In such situations, "affective messages... tend to be more persuasive..." (Teeny et al. 2021: 386). This affective function match explains the relative success of using narratives to target people's emotions toward other groups. Narrative messages describe events in chronological order with

information about characters. Kalla and Broockman (2020) present evidence from three field experiments on the impact of the “non-judgmental” exchanging of narratives where the speaker offers portrayals of unauthorized immigrants or transgender people (also see Broockman and Kalla 2016). They find, relative to a control placebo (and in one case, arguments alone), the inclusion of the narrative durably reduces exclusionary attitudes towards these groups. They (2023) elaborate on this work by positing an emotional mechanism via perspective-giving that “involves hearing a narrative about the experiences of an outgroup member (not necessarily from an outgroup member first-hand) ... [that] can trigger stronger emotional responses, promoting reactive empathy” (189). Kubin et al. (2021) similarly show that relative to facts, relaying personal experiences, particularly those relevant to the issue at hand and that involve harm/suffering, generates respect across group lines. While the direct role of affective matching has not been tested, it is consistent with these of findings regarding narratives matching the affective bases of group evaluations.

Narrative persuasion works, in part, because it can shift receivers’ motivations away from confirming their standing beliefs about a group (Druckman 2022). This aligns with another targeting approach where a political speaker matches receivers’ goals or motivational orientations (Teeny et al. 2021: 385-386). Bayes et al. (2020) distinguish between: a motivation to form accurate beliefs, a motivation to affirm one’s partisan identity, and a motivation to act in accordance with one’s basic values. They experimentally induce one of these motivations for each Republican study participant and then provide them with climate change messaging designed to appeal to one of the motivations. The respective messages describe a report on the scientific consensus that climate is changing due to human activities; a norms message that a clear majority of Republicans believe in climate change; and a moral value framing that climate

change will destroy the sanctity of the pristine environment. The authors find that Republican participants expressed greater belief in climate change when they received a message that matched the induced motivation (e.g., those with an accuracy motivation were more persuaded by scientific information, those with a value goal were more persuaded by a moral value message). Political psychologists have engaged in considerable debate about the pervasiveness of directional as opposed to non-directional motivations (e.g., Druckman 2012, Druckman and McGrath 2019, Tappin et al. 2020); this study shows that variation across and within these motivations shape the success of targeted messages.

This segues to more acute psychological matching approaches that focus on receivers' stable traits. Luttig and Lavine (2016) study the match between receivers' regulatory focus—that is, their chronic tendency to desire a prevention of losses or a promotion of gains—and messages that frame various policies in terms of losses or gains (e.g., tax cuts to businesses to prevent the loss of workers or to promote the gain of additional works). They find evidence that, particularly among less educated individuals, respondents become more persuaded when the valence frame matches their regulatory focus. The moderation by education reflects that better-educated respondents hold more extreme policy preferences, connect the policies to their ideologies, and thus are less swayable. Insofar as regulatory focus is often, but not always chronic, it can be thought of as a personality trait, cohering with micro-targeting based on personality. Along these lines, Yuan and Liu (2022) find that matching political messages about an election campaign or environmental protection (abstract/concrete) to respondents' trait-based power orientation (high/low) increases persuasion.¹

¹ They also present evidence for matching effects for power as a state (via priming) rather than a state.

Zarouali et al. (2022) demonstrate a personality-focused micro-targeting approach. In one experiment, they assess whether individuals exhibit more extroversion or introversion by using a personality profiling algorithm with text data. They then provide a matched or unmatched political orientation advertisement (e.g., the introversion advertisement employed questions while the extroversion advertisement included assertions) advocating for a political party. In another experiment, they do the same but focus on emotional messages (e.g., an introversion advertisement includes fear while an extroversion advertisement includes enthusiasm). They find, in both cases, that respondents exhibit greater support for the party when receiving matched advertisements. Interestingly, they also find that for extroverted individuals, the matched enthusiasm advertisement stimulated psychological elaboration (deliberation) about the message. In contrast to these matching results, Walker et al. (2020) test the impact of targeting messages about Brexit in England among those opposed to the initiative. They report scant evidence for the success of matching based on conscientiousness or openness, but they find some moral value targeting success in terms of loyalty (but less so for fairness).

Message Priming as Persuasive Political Targeting

I earlier noted the lack of work on targeting voters' salient issue concerns. This stems partially from a focus on a related strategy that involves political speakers crafting messages to alter issues that receivers view as salient. For example, in the 1960s, President Johnson's private polls showed that he had low popularity when it came to Vietnam but high approval regarding the War on Poverty. He thus continually emphasized the War on Poverty to dislodge Vietnam from voters' minds in favor of the War on Poverty. He had some success as his overall approval

increased as voters were primed to attend to the War on Poverty (Druckman and Jacobs 2015).² Teeny et al. (2021: 383) suggest that this could be considered a matching process: “The most common type of personalized matching examined in the literature occurs between the message content and the recipient where some aspect of the message is made to align with a temporary or chronic aspect of the recipient... it is also possible to modify the recipient’s momentary state to match the message (e.g., via priming...).” Here the alignment is not present at the point of message delivery, but the message generates the alignment. Thus, prior to receiving the message, the communication emphasis (e.g., War on Poverty) does not match the receiver’s state (e.g., they do not think of the War on Poverty as the key evaluative criteria). However, the message leads to alignment between the two by causing the receivers to share the message’s point of emphasis (e.g., the War on Poverty becomes the key evaluative criteria).

This type of priming or framing involves strategic targeting of recipients to induce alignment to the advantage of the speaker. It captures the essence of many political battles where the sides try to define the agenda in favorable ways (e.g., Berelson et al. 1954, Schattschneider 1960, Riker 1986, Hillygus and Shields 2008). This not only occurs with politicians (e.g., Druckman and Holmes 2004), but also with policy proposals; Druckman (2010) shows that when messages emphasize the social costs of a publicly funded casino, receivers exhibit significantly less support than those not exposed to such messages. In contrast, those receiving messages about economic benefits increase their support. These strategies cohere with theories of “selective emphasis” or “issue ownership” where candidates, parties, or advocates highlight advantageous issues or ways of thinking (e.g., Petrocik 1996, Green and Jennings 2017).

² The use of the term “priming” in this context is ambiguous as the evidence to date does not suggest an unconscious accessibility process, which “priming” entails in much psychology work (see Chong and Druckman 2007, Busby et al. 2018 for discussion).

Priming also occurs with identity. Klar (2013) shows that when receiving a message highlighting partisan identity, Democratic parents become more supportive of social service spending regardless of the national deficit (that falls to future generations), less supportive of anti-terrorism spending, and more supportive of releasing sex offenders early to start rehabilitation. In contrast, when the message primes their parental identity, their policy opinions move in opposite directions. This type of identity priming, however, can be used perversely when a speaker implicitly or explicitly targets identities that threaten the receivers. For example, Valentino et al. (2002) show that race-based campaign advertisements (e.g., suggesting underserving Black recipients of government programs) make racial attitudes (e.g., racial resentment) more accessible for non-Black respondents who, in turn, alter their candidate evaluations (for George W. Bush). One of the most famous targeted identity campaign appeals involved the 1988 Bush campaign's Willie Horton advertisement that displayed a Black furloughed prisoner who subsequently committed a rape and assault while under the auspices of Bush's opponent Dukakis's administration—the goal being to raise racial threat concerns to White voters. Mendelberg (1997, 2001) shows that exposure to the advertisement activated White respondents' reliance on racial prejudice in arriving at their attitudes about government programs aimed to address racial equality (e.g., spending, affirmative action in schools). This made them less supportive. Exposure made prejudiced individuals 15 percentage points more likely to oppose such policies (relative to non-prejudiced individuals) than when there was no exposure.

Other criteria can be primed: for instance, in the Bayes et al. (2020) study discussed above, the authors induced the goals, and, in that sense, one can imagine a priming strategy to bring goals (e.g., value affirmation) into alignment with a message (e.g., regarding values).

These and other examples, regarding issues, identity, and processing goals should be differentiated from conventional personalized matching for three reasons. First, as mentioned, strict matching seems to suggest alignment prior to communicative interaction. With priming, the outcome concerns altering the criteria on which receivers evaluate the object such as assessing anti-terrorism spending based on one's partisan or parental identity. Altering the criteria need not, by definition, lead to a changed attitude (e.g., it is conceivable that the parental identity criteria does not alter anti-terrorism spending attitudes). Second, the psychological processes could be distinct since, in terms of an expectancy value model of attitudes, priming involves altering the weights applied to criteria, whereas matching entails an overall change toward the object. How these processes relate to one another remains a topic for future study. Third, in discussing priming, Teeny et al. (2021: 383) mention a "momentary" state; however, that creates a slippery slope as in some instances, priming effects could endure. All of that said, discussions of persuasive political targeting would be incomplete without inclusion of priming given its prevalence in politics (Busby et al. 2018). It involves targeting by selecting precise criteria on which to focus given selected receivers, although without ex ante matching.

Heterogeneity in Message Targeting

Numerous studies on political communication suggest that messages have homogenous effects: roughly, the same impact on all people, regardless of individual characteristics. For instance, Coppock et al. (2018) explore individual heterogeneities in 27 survey experiments on persuasion, looking at six variables (age, education, gender, ideology, partisanship, and race) and find none of the variables moderate the effects. While they include appropriate caveats in the text, they also (12441) state "the overwhelming pattern that emerges is one of treatment effect homogeneity." Coppock (2023) goes further, arguing that political persuasion often occurs "in

parallel,” meaning that “people from different groups respond to persuasive information in the same direction and by the same amount” (2). While he (65) briefly acknowledges the possibility of other individual moderators, he also expresses skepticism (also see Coppock et al. 2020, Green et al. 2023). This work is certainly valuable and could be interpreted as evidence of ineffective matching since everyone responds similarly to messages. This would be a mistake (and to be clear, the authors do not suggest that interpretation *per se*). First, the messages studied are general messages, not constructed to match recipients’ characteristics. Thus, it is not too surprising they do not vary across receivers. Second, limited receiver characteristics receive attention, typically just basic demographics and political variables, rather than a range of identities, issues, motivations, and so on. The work suggests that failure to pursue a matching strategy may result in common effects across receivers, not that heterogeneities with other communication strategies do not manifest.

Source Matching

A common axiom of most political contexts is that individuals possess limited ability and motivation to engage in high elaboration (e.g., Mondak 1993, Cohen 2003, Achen and Bartels 2016). Consequently, scholars suggest individuals rely on shortcuts or cues under conditions of low elaboration. This includes source cues or assessing advice based on the speaker’s or source’s characteristics. Berelson et al. (1954: 109) capture this: “the political genius of the citizenry may reside less in how well they can judge public policy than in how well they can judge the people who advise them how to judge policy.” For political communicators, this suggests the efficacy of source-to-recipient matches: “aligning source characteristics—regardless of what the message conveys—with that of the recipient. Broadly, any form of similarity between the source of the message and the recipient tends to enhance persuasive impact...” (Teeny et al. 2021: 390). This

is akin to what Andrew Jackson's campaign did in 1828, as described in the chapter's opening narrative. I next review various source features including partisanship, ideology, and social identities (e.g., race, gender, religion). I then discuss the tension in the literature regarding the relative impact of partisan sources versus messages, and the role of experts in the context of source matching.

Source Characteristics

By far the most studied source characteristic concerns the speaker's partisanship. When a message, regardless of content, comes from a member of the receiver's party or the party writ large, it creates a match and increases persuasion. For instance, Slothuus and Bisgaard (2021a) track Danish citizens' policy opinions when their political parties, without warning, reversed their positions on two salient welfare issues. The authors (899) explain there was an "overnight shift in the parties' policy position [that] sparked intense criticism in the news media, and [from the other parties]." The authors use panel data from before and after the changes to show that partisans changed their opinions a la the cues by roughly 15 percentage points. The effects also lasted for at least several months.³ This demonstration evades confounds (e.g., shared elite-citizen values), due to the unexpected elite shifts. It also echoes similar findings from many observational, experimental, and quasi-experimental studies showing party source matching proves persuasive (e.g., Lenz 2012, Bisgaard and Slothuus 2018, Bullock 2020, Pink et al. 2021). However, various questions remain.

First, there exists substantial variation in the effects of party source matching with partisans moving their opinions from 3% to 43% of the policy opinion scale in different studies (Bullock 2011, 2020). Tappin (2022) studies this variation by looking at 34 distinct policy

³ That endurance is notable as other work suggests party cue effects last but not quite so robustly (e.g., reduced to 50% of the initial effects three days after exposure) (Tappin and Hewitt 2023).

questions and finds the impact ranges from 15% (on whether Congress should audit the Federal Reserve) to 1% (on whether police should be required to wear body cameras). Thus, some of the variation stems from differences in the issues under study (also see Clifford et al. 2023). Other relevant variables likely include the strength of prior opinions (Bartels 1993), self-interest (Slothuus and Bisgaard 2021b), and whether individuals have already been exposed to arguments on the topic (Druckman and Leeper 2012). Party source matching also does not always generate more extreme beliefs, such as when they offer more moderate positions than one would have based on self-interest alone (Slothuus and Bisgaard 2021b).

Second, as for when party source matching works, one intriguing dynamic concerns the influence of an out-party source communicating to members of their party. For example, Democrats might hear Republicans reject the Green New Deal to a Republican audience, or Republicans might hear Democrats advocate for limits on assault rifles to a Democratic audience. Here, partisan observers can take an “anti-cue”; they do the opposite of the message (e.g., Democratic voters support the Green New Deal; Republican voters oppose limits on assault rifles) (Nicholson 2012, Druckman et al. n.d.). Additionally, scholars have identified contextual (e.g., increased elite polarization) and individual (e.g., low need for cognition, low issue salience) (Druckman et al. 2013, Boudreau and MacKenzie 2014, Arceneaux and Vander Wielen 2017: 98-105) factors that shape the impact of party source matching.

Related to a party source match is an ideology source match. Hartman and Weber (2009) explore the impact of messages advocating for a hate group’s right to hold a rally (that would contain racist rhetoric) due to free speech considerations or against such a right to rally due to public safety considerations (e.g., counter-protesters provoking destructive confrontations). They vary whether the statement’s source is “liberals” or “conservatives” and find strong evidence that

an ideological match (e.g., liberal source/liberal respondent) facilitates persuasive success.

Interestingly, the matching effect is less evident when individuals receive competing frames that offer each perspective.

Beyond partisanship and ideology, social identity source matches can occur. These echo the previously discussed work on signaling identity in the message; however, in this case the identity alignment comes from the source. For instance, Kuklinski and Hurley (1994) show Black receivers follow the advice of Black speakers, even when those speakers have ideologies that contradict those of the receivers (e.g., Black liberals follow the advice of both liberal Jesse Jackson and conservative Clarence Thomas but not liberal Ted Kennedy). How racial and ethnic identity works though is not so straightforward, as it often interacts with message content. For example, Bonilla et al. (2022) find that White (matched) respondents punish White candidates who derogate Black or Muslim individuals, but they do so less when the candidate is Black (mismatched). In this case, then, a mismatched speaker is more effective in garnering support (given the noxious content of the message). This echoes the long-standing finding that speakers with an unexpected message become persuasive (e.g., Sears and Whitney 1973, Berinsky 2017).

Holman et al. (2015) find that candidate appeals (i.e., working on domestic violence programs) with a female source match—that is, a female speaker and receiver—prime the receivers to rely on group-based social identity considerations (e.g., closeness to women) in their evaluations. They consequently evaluate the candidate more positively (relative to when they receive a non-targeted appeal). Interestingly, even though the mismatched situation with a male speaker (candidate) did not successfully prime, it increased candidate evaluations at similar levels. The results highlight the ambiguity of comparison points: the matched source appeal did not have more success than the mismatched source appeal in terms of the overall evaluation

(even if it primed more). Yet, it generated more favorable overall evaluations relative to a message sans the congruent appeal (i.e., about domestic violence). These results raise an interesting question about the relevant comparison point for assessing the effect of a matched message. The authors find an impact when keeping the source match constant but changing the message content, but not when keeping the content constant but changing the (matched) source.

While social identity source match effects surely encompass a range of other identities, I offer just one more example. Chu et al. (2021) show that during the COVID-19 pandemic, unvaccinated American Christians expressed an increased intention to get vaccinated upon receiving an encouraging message from the director (at the time) of the National Health Institute, Frances Collins, who highlighted his Christian identity. That said, other work exploring whether Pope Francis's 2015 pronouncement about the moral imperative to address climate change suggests it swayed liberals but may have backfired among Catholic conservatives (i.e., they devalued the Pope's credibility) (Li et al. 2016; c.f., Schuldt et al. 2017).

Clearly, source matching is not a magical persuasive strategy—it contributes to effective messaging but also introduces various uncertainties. These include what is the appropriate baseline of comparison (e.g., a non-matched speaker, a control message with no speaker), whether it depends on the nature of the message (e.g., backlash seems less likely with a social identity source match than a social identity message match), and how people psychologically process the match. Nearly twenty years ago, Nelson and Garst (2005) explored the relative impact of source identity matches, message value matches, and their interaction on elaboration and persuasion. They find a complex pattern such that the source-matching effect depends on the concordance of the expected values evoked in the message (e.g., mismatched partisan speakers who assert unexpected values are rejected). Their (510) conclusion still holds: there is a “need to

move beyond isolated investigations of the persuasive powers of social identity, personal identity, and expectancies and to look at these persuasive processes in combination.”

Party Source Matching Versus Message Content

When a source match will exhibit an effect remains unclear, and, as mentioned, this is a particularly perplexing issue regarding partisan sources and message content (regardless of whether it matches). Initial studies found both party source matches and message content matter. For instance, Bullock (2011) reports that when people read newspaper articles about state-sponsored health care, party source matches influence their reactions, but policy information, even if contrary to the party source matters more (also see Nicholson 2011, Boudreau and MacKenzie 2014, Peterson 2017). Yet, in other situations, party matches dominate. Druckman et al. (2013) find that when partisan polarization is high (e.g., the parties are said to be far apart on an issue), partisans follow the party source match advice regardless of the policy content (on two issues—support for drilling and support for the DREAM Act). When polarization is said to be low, the strength of the policy argument (for or against the given position) dwarfs the party source match effect. More recently, Barber and Pope (2019) exploit the fact that President Trump took contrary policy positions over his term by experimentally varying his position and evaluating the reactions of party-matched Republicans. They find many Republicans follow Trump’s stance regardless of the direction of the position. While this study does not include detailed policy information, it suggests overwhelming source matching effects: “a large number of party loyalists in the United States [act such that] group loyalty is the stronger motivator of opinion than are any ideological principles” (38).

That said, in the most extensive study to-date, Tappin et al. (2023a) show that both party source matches and detailed policy message content matter. They show that, across 24 policy

issues and 48 persuasive messages, partisans are moved by partisan source matches, but they also update according to distinct messages that contradict the cues: “persuasive messages and countervailing leader cues were integrated as independent pieces of information” (1). Whether individuals integrate a source-match as a piece of information or as a credible source is unclear and likely varies across people and contexts (e.g., Eagly and Chaiken 1993: 336-338). This speaks to the importance of future work that should identify the psychological process underlying partisan-matching—is it a distinct piece of information, a cue, a trigger for motivated reasoning (e.g., Leeper and Slothuus 2014)? Another obvious next step involves introducing a mix of source and message matching to evaluate their relative importance.

Source Matches Versus Experts

As mentioned, in politics, many delegate information acquisition to others. For Berelson et al., the “genius of the citizenry” lies in identifying credible opinion leaders (also see Downs 1957). This raises two questions. First, what traits do credible advisors possess? Lupia and McCubbins (1998) argue it requires that a receiver perceives the speaker to have knowledge about the topic at hand and share the receiver’s interests (also see Druckman 2001). For them, no other speaker characteristic matters. They show that this ensures that receivers make “more reasoned” choices; however, this requires receivers to maintain accurate perceptions which may or may not be the case (e.g., Kuklinski and Quirk 2000). Second, if this is the case, does the evidence reviewed on source matches suggest following sources is a poor strategy? On the one hand, those who share individual characteristics with the receiver may have common interests and, at least in the case of party elites, more knowledge. On the other hand, source matching as a general strategy may be ineffectual. For example, Minozzi et al. (2020) use panel network data to show that people tend to incidentally discuss politics with others who share their demographic

characteristics (e.g., gender, race/ethnicity, religion) rather than with politically interested and knowledgeable opinion leaders. This, in turn, affects what people learn. Carlson (2019) shows that people learn less from non-ideal informants relative to “ideal informants” who resemble knowledgeable and trustworthy opinion leaders. Thus, matching to those who share one’s traits may lead to advice and persuasion that leaves one worse off (Kinder 1998: 176). This discussion leads to another question concerning expertise and ways of knowing. The last two decades have seen polarization based on ways of knowing with conservatives becoming more intuitivist and liberals becoming more rationalist (Oliver and Wood 2018, Oreskes and Conway 2022). This accentuates a normative tension on what constitutes desirable persuasive outcomes. Is it a desirable outcome if a receiver follows a source match that coheres with a conspiratorial mindset that ultimately jeopardizes their well-being?

Setting Matching

Matching aspects of the setting to an aspect of the receiver is the least studied type (Teeny et al. 2021: 391). In political contexts, there is little, if any, explicit discussion of political targeting that involves contextual variation. That said, some work on political communication reveals what can be construed as setting match effects. Further, as with message matching, a distinct stream of work reveals how the environment can prime considerations that bring a receiver into alignment with the setting. I discuss each of these research agendas, respectively. I also briefly touch on how settings influence the types of data (surveys, social media, public records) that strategic actors collect about receivers when attempting to identify receiver characteristics to which they should match (using message, source, or setting matching).

Setting Characteristics

As with many other social behaviors, political decisions often reflect normative pressures. This can reflect injunctive or descriptive norms (e.g., Raymond et al. 2023) that, respectively, induce an individual to act in a way that they feel they ought to or lead them to emulate what others in relevant social groups do. Norms can be invoked in messages, but they also can be shaped by context such that individuals act to avoid a norm violation. The match is between a general desire to act consistent with norms and a situation where failure to do so carries relatively higher consequences. For example, Gerber et al. (2008) explain that individuals receive an extrinsic benefit from voting (i.e., a feeling of pride instead of shame from the social consequences). That, in turn, depends on the probability of others learning whether one votes: if they learn that one votes, there is a feeling of pride; if they learn that one does not vote, there is a feeling of shame. Thus, a setting match occurs when the context enables others to learn of one's voting behavior (leading people to vote due to their extrinsic concerns). The authors show that a setting where one's neighbors learn of voting decisions increases turnout, relative to a control context, by 8.1 percentage points.

Public settings also induce those from particular groups to express opinions or take actions due to being observed by group members (e.g., Sinclair 2012, Levitan and Verhult 2016). For instance, Baxter-King et al. (2022) show Republicans were less likely to wear a mask in public during the COVID-19 pandemic if their neighborhood had a higher (vs. lower) proportion of fellow Republicans living in it. However, the social context did not impact unobservable health behaviors such as vaccination (also see Druckman et al. 2021). Insofar as partisanship acts as a social identity where group approval is vital (Kahan 2015), the context set in motion Republican behavior by normalizing one behavior or another (i.e., the public nature of masking matched Republicans' concern about group approval). Geographic partisan sorting over the last

three decades suggests public settings may increasingly match partisan's concern for in-group approval leading partisans to bring their beliefs into alignment with spatially proximate fellow partisans (Brown and Enos 2021).

The discussion thus far focuses on receivers, writ large, but of course there is heterogeneity in attention to public appearances. For instance, Connors et al. (2019) focus on self-monitoring—that is, the extent to which one worries about presenting themselves in a way to impress an audience. They find that when their opinions may be publicly disclosed, high self-monitors are less likely to answer “don't know” to political knowledge questions and more likely to over-report their income. This highlights that a public setting match depends on receiver motivations, and, in the case of public contexts, those more worried about appearances will be more easily swayed.

A final point concerns the contextual effects of on-line versus off-line political communication. A stream of work proposes a mismatch dynamic where on-line settings mismatch a general preference for emotional self-regulation (due to the lack of face-to-face interactions that generate empathy and perspective-taking) leading individuals to express more hostility on-line (Baek et al. 2012). Yet, Bor and Peterson (2022) offer extensive evidence against the hypothesis, arguing that status-driven individuals select into on-line context and have extensive visibility. Even so, distinct media likely affect behaviors and potential matching phenomenon that require further study (e.g., Wittenberg et al. 2021).

Settings as Targeted Priming

The examples of successful setting matches involve public settings aligning with normative characteristics. Contexts also can prime considerations that bring receiver features into

alignment with the setting (Teeny et al. 2021: 391). As with message priming, this type of setting priming could be used in a targeted fashion and thus deserves consideration.

Targeted setting priming can occur in terms of receivers' motivations. Groenendyk and Krupnikov (2021) argue that the setting can generate alignment with motivation. Specifically, many political settings are rife with conflict. This prompts directional processes that can lead to polarized opinions. Yet, when politics are presented as a public deliberative endeavor (Karpowitz and Mendelberg 2014), individuals move away from directional goals and engage in open-minded assessments of arguments counter to their standing beliefs (on gun control). Here the setting alters motivations and generates an alignment between the setting (political/deliberative) and the goal (directional/non-directional) (also see Druckman et al. 2021).

Settings also can spur alignment of the considerations on which receivers draw in forming opinions. Berger et al. (2008) show that individuals assigned to vote at a school location (as opposed to a church, city hall, etc.) privilege education considerations and consequently are more likely (than those at other locations) to support a school funding initiative. Nicholson (2005) demonstrates that initiatives on a ballot—such as those involving abortion, taxes, or immigration—prime those issues and alter the considerations underlying candidate preferences even if the candidates did not highlight those issues. These two examples show that geographic setting and electoral settings alter the considerations in voters' minds, bringing them into alignment with the context. Political actors can leverage these types of setting priming effects. For example, as media fragmented in the early 20th century, presidents began to increasingly target local media markets to connect with voters, similar to Harry Truman's 1948 whistle-stop campaign as detailed in the introduction. Modern presidents go further by selectively priming

local issues that advantage them (Cohen 2009). They anticipate a setting match and act accordingly to cement support.

Settings and Identifying Receiver Characteristics

Strategic political actors need to acquire information about receivers to pursue matching via sources, messages, or settings. Three points are relevant here. First, surveys are a common way to obtain such information. In so doing, context substantially matters; the sample and answers to many questions systematically differ depending on whether the survey occurs in-person, on the phone, on-line, or some mix. When a survey interviewer is present, that person's identity can shape responses (e.g., people are less comfortable revealing sensitive information to those different from themselves). The order of the questions in a survey also matters. For instance, respondents may base their evaluations of a political candidate on economic (foreign affairs) issues if they first answer questions about how the economy is doing (foreign relations are going) and then are asked to evaluate a political candidate (e.g., Tourangeau et al. 2012). Here, the initial question primes what respondents focus upon in constructing evaluations to later questions. The point is that the holistic study of political matching that incorporates how actors determine receivers' characteristics, needs to account for survey settings.

Second, matching information increasingly comes from the internet and particularly social media. Here, context matters as well. How people behave on social media reflects specific motivations, often those aimed at self-presentation and impression management for an "imagined audience" (e.g., Kraft et al. 2020). Thus, users may make decisions that differ from how they would act in a distinct setting. Those relying on such data need to assess receivers' characteristics, keeping in mind their motivations.

Third, Hersh (2015) argues that campaigns often rely on public records for knowledge about voters. Consequently, the setting of the state and the nature of the available records (which widely vary) alter what campaigns know and how they perceive voters. In sum, settings matter to targeted political communication not just as a way to match or prime, but also in terms of gathering information to develop matching strategies.

Discussion

It may seem surprising that I described political personalized matching or targeting as remarkably understudied, given the amount of work reviewed. It is fair to say that there is more knowledge than I may have suggested. Yet, without Teeny et al.'s (2021) framework there would not have been a way to organize, much less identify, much of the reviewed work (given it often does not frame itself as about targeting). Their framework also provides a guide for subsequent work; for instance, they mention a host of receiver characteristics that have been ignored in political persuasion research. I conclude with four major points.

[Insert Table 1 About Here]

First, while Teeny et al.'s (2021) framework has obvious crucial value, it can be placed in the larger context of political persuasion. Druckman (2022) offers the “generalizing persuasion” framework that identifies persuasive actors, stimuli, outcomes, and settings (i.e., the dimensions of external validity). This becomes useful to, in some sense, reconfigure Teeny et al. (2021). In Table 1, I list each dimension along with the relevant components and some “notes.” The first dimension of actors includes the speaker, receiver, and observers. The speaker and receiver are obvious, but the inclusion of observers matters for targeted political communication. The work on message matching reveals that, in some cases, those not targeted by a message react in the opposite direction (e.g., non-Latinos move against a candidate who sends a matched message to

Latino voters). The treatment includes matching elements: receiver characteristics, message content, and speaker characteristics. These of course constitute the elements of two of the three personalized matches: message-receiver, and source-receiver. The setting highlights that public revelation heightens normative behavior, and that media context has unclear implications for matches. As with messages, context can prime receiver characteristics into alignment to shape preferences. One might ask why setting is placed in a distinct category from speaker and message matching; part of the reason reflects that political actors may have less control over settings and thus have to adapt messages and sources to the setting with which they are straddled (e.g., as presidents have done with going local). Further, the generalizing persuasion framework reveals that message-receiver or source-receiver matches may or may not be robust across settings—not a point discussed here but a reality about how environments can moderate other relationships. Finally, in pursuing a personalized matching strategy, speakers can target various relevant political outcomes, such as evaluations of themselves (e.g., candidates) or attitudes toward another entity (e.g., a policy), or a behavior. Some matching strategies could work better for some outcomes than others (see Luttrell and Trentadue 2023). Further, any matching effort could involve an intersection of source, message, and/or setting—the differentiation of the three “types” of matching is analytically useful but many communications could invoke multiple types. And, of course, the ultimate result could be success, failure, or even a backfire effect.

The components in Table 1 are not exhaustive, the point instead being to stimulate conversation about considerations when generalizing about personalized matching in politics. This segues into my second point concerning conceptual issues. One is ensuring any test of political targeting accounts for persuasive effects, null effects, and backfire effects, across receivers and observers. Otherwise, the literature runs the risk of misrepresenting how

personalized matching works (e.g., publication bias). This is a crucial point given an increasing number of studies involve actual campaign material or partnerships with campaigns. While this may increase ecological validity, it comes with the risk of focusing on bundled treatments pre-selected for success (the pre-selection criteria should be explicit). Another issue concerns what could be thought of as alternative approaches to personalized matching. The canonical approach involves identifying a message, speaker, or setting that matches an extant receiver characteristic. The priming approach involves using a message, speaker, or setting to bring a receiver characteristic (e.g., decision criteria such as voting based on a particular issue) into alignment. Of course, there is a long-standing, larger literature on priming in psychology and political science and one could argue that it should be left distinct from personalized matching (although see Teeny et al. 2021: 383, 391). Regardless, in considering political targeting, it seems highly relevant given political actors often strategically identify advantageous decision criteria and work to activate it. Final conceptual considerations include, as mentioned in the gender source match discussion, motivating the counterfactual used to evaluate the success of personalized matching (e.g., relative to a mismatch or a control condition), and how to evaluate persuasion given the disjuncture between “perceived persuasiveness” (often used to identify what might match) and actual persuasiveness (O’Keefe 2018).

My third point is about the psychology of political targeting. It is surely apparent that this review contained little discussion of psychological processes, ignoring crucial questions about what makes for a strong match, the influence of elaboration states, the influence of matches on elaboration, metacognition processes, and so on. Teeny et al. (2021) offer a detailed psychology model that, unfortunately, has received insufficient attention in the politics literature. A glaring example concerns source-recipient matches, a dynamic long recognized in politics given the role

of source cues. In such situations, as intimated, receivers could rely on the source matches in a low elaboration fashion, as a heuristic, or they could incorporate it in a much more elaborative way as one consideration among many (e.g., Chaiken et al. 1989, Luttrell and McRobert n.d.).

The final point involves the normative and ethical implications of targeting in politics (see Hersh 2015). Normatively, scholars have raised concern that targeted appeals could be disingenuous as speakers narrowly broadcast them in non-transparent ways (e.g., Hillygus and Shields 2008). This could make it difficult for voters to have full knowledge of a candidate's platform; it also remains unclear whether candidates keep promises made in targeted messages as often as they do in more generalized statements. A related issue revolves around the intent of the speaker—to impart knowledge and relevant considerations to specific audiences, or to manipulate? This question prompts a discussion of the ethics of personalized matching. The approach entails using knowledge or data about the receiver without the receiver's consent. This becomes a particularly tricky question in an age of big data where political actors can mine personal information without recipients knowing (e.g., Nickerson and Rogers 2014, Persily and Tucker 2020). If that information is used, though, to provide receivers with information more relevant to them, is that unethical? If it is instead used to manipulate voters to focus on considerations not in their ideal interests, is that unethical? Who judges whether each of these scenarios is in play? Does it ethically matter if the targeting comes from one's favored candidate or party (e.g., Binder et al. 2022)? Is it problematic that most have limited knowledge of targeted political communication (Nelson et al. 2021)? Are these questions even relevant if the overall effects of targeted communications are limited? The work discussed in this review highlights possible impacts of personalized matched political communication, but just how often and how large the effects are remains unknown, especially in an era of saturated political communications

(Coppock et al. 2022). As technologies evolve and targeting efforts increase, it is incumbent on social scientists to make a concerted effort to understand their effects on political outcomes and democratic functioning.

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Table 1: Persuasive Political Targeting and the Generalizing Persuasion Framework

Dimension	Component	Notes
Actors	<ul style="list-style-type: none"> • Speaker (source) • Receiver • Observers 	<ul style="list-style-type: none"> • Observers witness personalized matching between a speaker and receiver.
Treatment	<ul style="list-style-type: none"> • Receiver Characteristics • Message Content <ul style="list-style-type: none"> ○ Message priming • Speaker Characteristics 	<ul style="list-style-type: none"> • The components for two of the three types of personalized matches: message-receiver and source-receiver. • Examples of message content include social identities, morals or values, issue priorities, attitude function, motivational orientation, and personality. • Message priming brings receiver characteristics into alignment with the message. • Examples of source characteristics include partisanship, ideology, and social identity (e.g., race, gender, religion).
Setting	<ul style="list-style-type: none"> • Public or private • Medium <ul style="list-style-type: none"> • Setting priming 	<ul style="list-style-type: none"> • The components of the setting-receiver match (e.g., public settings match normative motivations). • The influence of medium remains unclear. • Setting priming brings receiver characteristics such as motives or considerations into alignment with setting. • Political actors may have less control over settings and thus adapt messages and sources accordingly.

Outcome	<ul style="list-style-type: none">• Evaluation of speaker, policy, institution.• Persuade, null effect, backfire.	<ul style="list-style-type: none">• Various persuasive outcomes on which to focus.• Effects can be success, none, or the opposite of what is intended (backfire).
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