

FOR IMMEDIATE RELEASE
July 2004

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**HIGH VOLUME OF PRESIDENTIAL CAMPAIGN
TV ADVERTISING IN BATTLEGROUND STATES,
YET 60 PERCENT OF AMERICANS LIVE IN AREAS
WHERE NO ADS HAVE AIRED**

**DEMOCRATIC CAMPAIGN TELEVISION ADS
HIGHEST IN OHIO AND MISSOURI MARKETS**

**Bush Campaign has Advantage over Kerry Campaign in Most Media
Markets, but when Kerry Supporting Groups are Included the Democrats
Take the Lead in Most Places**

MADISON, WI – Despite record television advertising, nearly 60% of Americans live in areas where no presidential campaign TV commercials have been broadcast since the end of the primary season on March 4.

Meanwhile, television viewers in Ohio's four largest media markets were more likely to see ads in the presidential contest than were viewers in any other area of the country, except those in Kansas City, which ranked third in the nation.

These results are among the findings of a new report from the University of Wisconsin Advertising Project that analyzed data provided by Nielsen Monitor-Plus. The report is the first-ever comprehensive analysis of presidential campaign political television advertising in all 210 media markets across the nation.

JOURNALISTS MUST USE THE FOLLOWING FORMAL CITATION WHEN CITING ALL DATA AND DATA TABLES: *NIELSEN MONITOR-PLUS AND THE UNIVERSITY OF WISCONSIN ADVERTISING PROJECT.*

President Bush's campaign ran more ads than challenger John Kerry's campaign in 83 of the 93 media markets in which presidential campaign TV ads have aired, the study finds. But when faced with the combined efforts of the Kerry campaign and the independent groups the Media Fund, MoveOn.org, and the AFL-CIO, Bush activity outpaced Democratic advertising in only 31 of those 93 markets.

"The Kerry campaign and its allies are reaching voters more often than the Bush campaign in most of the top media markets in battleground states," says Professor Ken Goldstein, director of the University of Wisconsin Advertising Project.

While Democrats outspent Republicans almost across the board, the data show that Bush, Kerry, and allied group advertising track very closely to each other. All targeted Ohio and Missouri over other states, women over men, and older voters over younger voters.

Geographically, four of the top six media markets for advertising in the presidential race were in Ohio, with Missouri markets seeing the third and sixth highest concentrations of advertising.

**TABLE 1:
Top 10 Targeted Media Markets for Overall Presidential Advertising**

- 1.) Toledo, OH
- 2.) Dayton, OH
- 3.) Kansas City, MO
- 4.) Columbus, OH
- 5.) Cleveland, OH
- 6.) St. Louis, MO
- 7.) Portland, OR
- 8.) Erie, PA
- 9.) Las Vegas, NV
- 10.) Detroit, MI

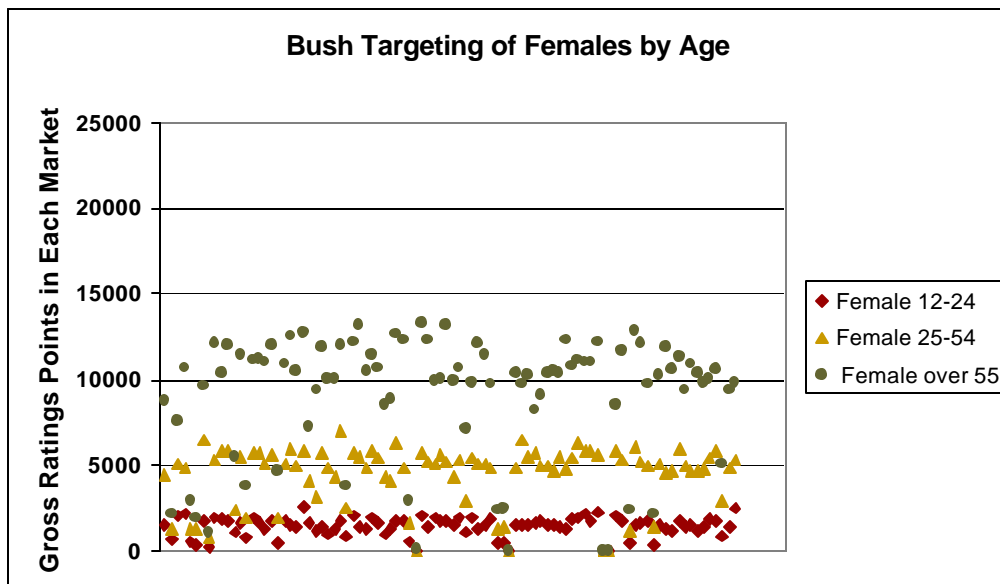
Source: Nielsen Monitor-Plus and The University of Wisconsin Advertising Project

Demographically, both sides targeted females more than males and older viewers over younger viewers. The oldest segment of viewers, those over 55, saw far more ads than viewers aged 25-54. Younger viewers, those under 25, have seen, by far, the fewest presidential campaign TV ads.

Jeff King, managing director of Nielsen Monitor-Plus, notes “Young viewers are notoriously difficult to reach through television advertising, and commercial advertisers often pay a significant premium to reach that demographic group.”

The following figures illustrate each side’s buys by gender and age breaks for the 93 markets with presidential ad activity.

FIGURE 1

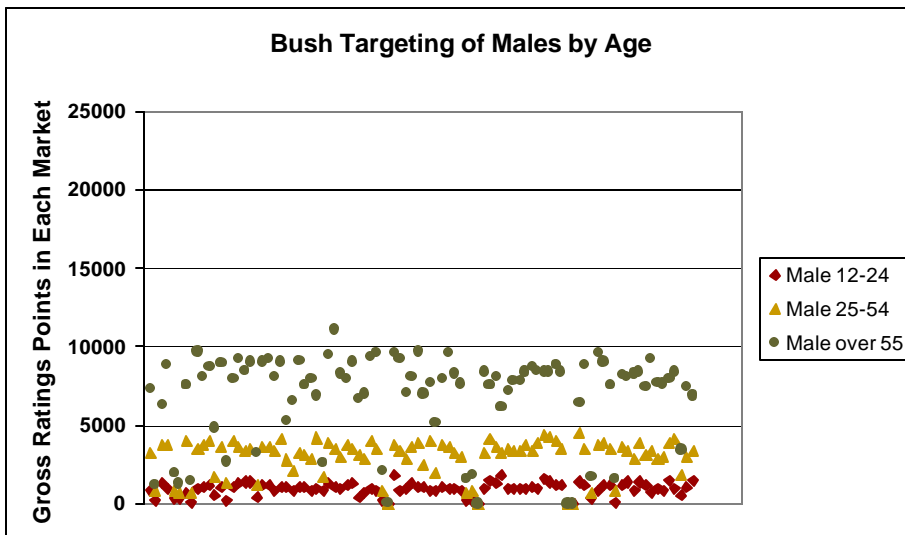


Source: Nielsen Monitor-Plus and The University of Wisconsin Advertising Project

DEFINITIONS:

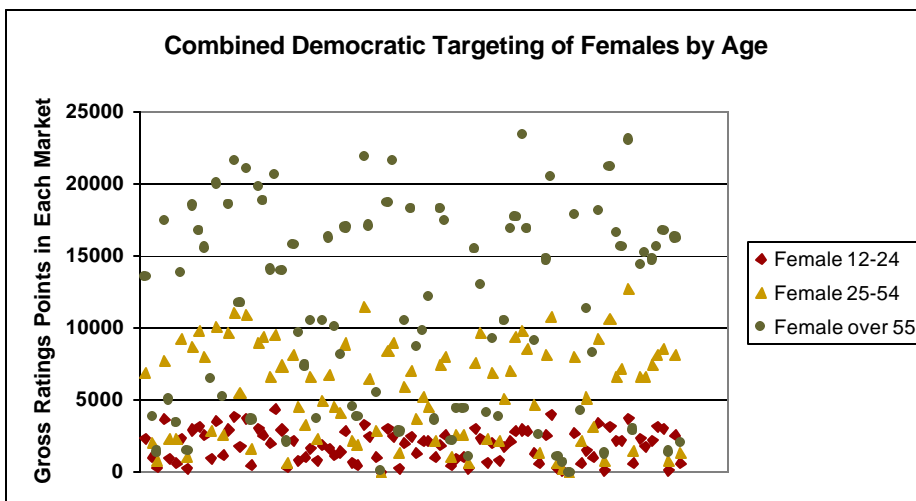
"GROSS RATINGS POINTS" are defined as: A unit of measurement of audience size for television programs or commercials. It is used to measure the exposure to one or more programs or commercials, without regard to multiple exposures of the same advertising to individuals. Also called GRPs or "points." GRPs are the sum of all ratings points achieved for a particular spot schedule among all television households and are a measure of the advertising weight delivered within a given time period. One "RATINGS POINT" is equal to, on average, one percent of the total television household audience in a particular media market or target demographic. For example, 50 individual airings of an advertisement, each with an average ten-point rating, would achieve a total 500 GRPs. This is the equivalent of 100% of all TV households in a certain market each viewing the spot, on average, 5 times. But it is also the same as 50% of these households each seeing it an average 10 times. Points can be used to describe reach among target demographics. So if 200 points were achieved for females age 55 or over, it would mean that we would expect each female over 55 to have seen particular ads twice. Therefore, Gross Ratings Points are the sum or product of total target household audience reach times average exposure frequency. GRPs can be compared across markets to determine whether viewers in the compared markets have seen more or less advertising. GRPs are a metric which is a proportion of viewers within a particular market and thus cannot be summed across markets.

FIGURE 2



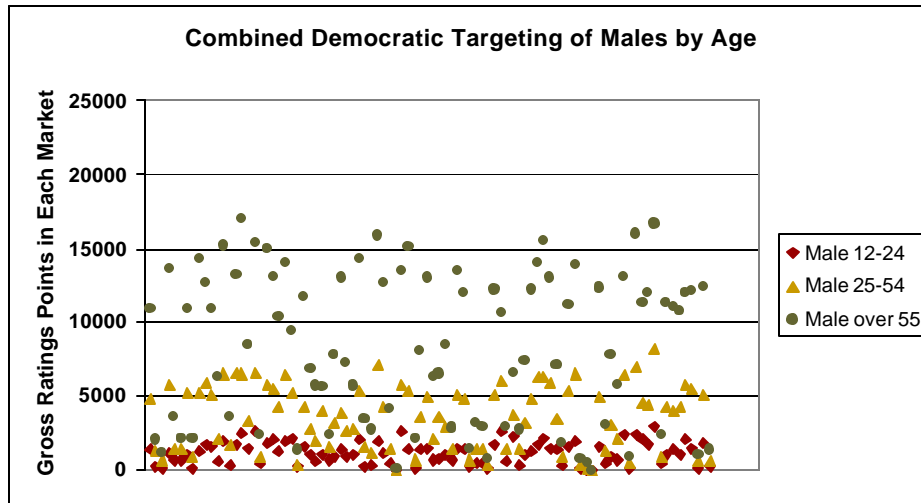
Source: Nielsen Monitor-Plus and The University of Wisconsin Advertising Project

FIGURE 3



Source: Nielsen Monitor-Plus and The University of Wisconsin Advertising Project

FIGURE 4



Source: Nielsen Monitor-Plus and The University of Wisconsin Advertising Project

Bush Campaign Advertising

The Bush campaign has displayed a strikingly uniform strategy in their media buying across markets, with buys ranging from 8,000 to 11,000 gross rating points in nearly all targeted markets.

The top ten markets for the Bush campaign were Burlington-Plattsburg VT, Detroit MI, Sioux City IA, Kansas City MO, Green Bay-Appleton WI, Erie PA, Wilkes Barre-Scranton PA, Presque Isle ME, Dayton OH, Lansing MI (Table 2).

Among the few markets where the Bush campaign out-advertised Kerry and his Democratic allies were Miami, where Bush had a 5,000 gross rating point advantage (with the 11th biggest Bush advantage in the nation), and several of the markets in the Florida panhandle. In addition, the Bush campaign had advantages in two small rural Ohio markets, Lima and Zanesville, which the Democrats have ignored almost completely, notwithstanding a new Kerry campaign emphasis on small town and rural America.

Goldstein observes, "Interestingly, in the handful of media markets in battleground states where the Bush campaign maintained an advantage, the Democrats were often up at high levels and even had large advantages in the rest of the state. These are either potentially damaging oversights or savvy strategic decisions. For example, while Democrats enjoyed an advertising advantage in Orlando, Tampa, West Palm Beach and Tallahassee, the Bush campaign maintained an advantage in Miami and the much smaller markets of Ft. Myers, Mobile-Pensacola, Panama City, and Gainesville. In 2000, the presidential campaign of Al Gore followed a similar strategy, ignoring much of the Florida panhandle."

In Pennsylvania, the Bush campaign had slight advantages in the Philadelphia and Harrisburg markets even though Democrats maintained a significant advantage in the rest of the state such as the markets of Scranton, Johnstown, Erie and Youngstown.

Democratic Advertising

The Kerry campaign and allied Democratic groups made Ohio and Missouri media markets their top advertising target. The top five media markets for combined Democratic ad placements were, in order, Toledo, Dayton, St. Louis, Columbus and Kansas City. Table 3 shows the top 10 markets targets of the Kerry campaign when combined with the Media Fund, MoveOn and the AFL-CIO.

In contrast to the Bush campaign, volume of ad buying on the Democratic side has varied significantly between markets with a clear attention being paid to Ohio and Missouri. With this intense focus on these two states, the Kerry campaign and their Democratic allies have enjoyed significant ad message advantages in Ohio and Missouri media markets (see Table 5 below).

**TABLE 2:
Top 10 Targeted Media Markets for Bush Campaign**

- 1.) Burlington-Plattsburg (into NH)
- 2.) Detroit, MI
- 3.) Sioux City, IA
- 4.) Kansas City, MO
- 5.) Green Bay-Appleton, WI
- 6.) Erie, PA
- 7.) Wilkes Barre-Scranton, PA
- 8.) Presque Isle, ME
- 9.) Dayton, OH
- 10.) Lansing, MI

**TABLE 3:
Top 10 Targeted Media Markets for Kerry and Democratic Groups Combined**

- 1.) Toledo, OH
- 2.) Dayton, OH
- 3.) St. Louis, MO
- 4.) Columbus, OH
- 5.) Kansas City, MO
- 6.) Portland, OR
- 7.) Cleveland, OH
- 8.) Las Vegas, NV
- 9.) Erie, PA
- 10.) Reno, NV

**TABLE 4:
Top 10 Media Markets with Bush Advantages**

- 1.) Burlington, VT (targeting NH)
- 2.) Salisbury, MD (targeting DE)
- 3.) Quincy-Hannibal, IA
- 4.) Zanesville, OH
- 5.) Mobile-Pensacola (targeting FL)
- 6.) Alpena, MI
- 7.) Lima, OH
- 8.) Travers City, MI
- 9.) Panama City, FL
- 10.) Fargo, ND (Targeting MN)

**TABLE 5:
Top 10 Media Markets with Combined Democratic Advantages**

- 1.) Toledo, OH
- 2.) St. Louis, MO
- 3.) Columbus, OH
- 4.) Portland, OR
- 5.) Dayton, OH
- 6.) Kansas City, MO
- 7.) Cleveland, OH
- 8.) Springfield, MO
- 9.) Las Vegas, NV
- 10.) Reno, NV

Source: Nielsen Monitor-Plus and The University of Wisconsin Advertising Project

Other groups, such as the Sierra Club, League of Conservation Voters and the New Democrat Network on the Democratic side as well as Club for Growth, Citizens United, and Progress for America on the Republican side also have aired ads in the presidential race. These other groups' spending was a tiny proportion of the total presidential ad spending; their advertising was seen in only a handful of markets and so was not included in this study.

Local News and Programming

Both campaigns heavily favored local news in their media buying. Local news accounted for over 40 percent of each presidential campaign's TV advertising. Morning network shows, such as The Today Show and Good Morning America, comprised another 11 percent of ad buys.

Following these two categories, the campaigns spent more of their money on syndicated daytime talkers The Oprah Winfrey Show, Dr. Phil, and Live with Regis & Kelly. Access programming, the shows following local news and before primetime, proved next most popular, with syndicated shows like Wheel of Fortune and Jeopardy! proving most popular. These dayparts (defined by the times of telecast, generally four hour periods) were trailed by primetime, which, while far more expensive, reach many viewers who watch no other TV.

These results are among the latest campaign 2004 findings from an ongoing study of political television advertising by Ken Goldstein, director of the University of Wisconsin Advertising Project and an associate professor in the university's political science department.

These data include all advertising buys from March 4, 2004, through June 20, 2004. The University of Wisconsin Advertising Project (<http://www.polisci.wisc.edu/tvadvertising/>) is funded by the Pew Charitable Trusts. Goldstein has been analyzing trends in campaign and issues advertising since 1996.

Working with Nielsen Monitor-Plus, the University of Wisconsin Advertising Project will continue to release up-to-date information and analysis on both candidate and interest group advertising activity and spending throughout the 2004 elections. The Project will release comprehensive totals immediately after the election.

Nielsen Media Research is the world's leading provider of television audience measurement and related services. In the United States, Nielsen's National People Meter service provides audience estimates for all national program sources, including broadcast networks, cable networks, Spanish language networks and national syndicators. Local ratings estimates are produced for television stations, regional cable networks, MSOs, cable interconnects, and Spanish language stations in each of the 210 television markets in the United States, including electronic metered service in 56 markets. Worldwide, Nielsen Media Research is active in nearly 40 countries, offering television and radio audience measurement, print readership and customized media research services. Nielsen Media Research also provides competitive advertising intelligence information through Nielsen Monitor-Plus in the United States and in 28 other markets worldwide. Through a network of affiliates, coverage is extended to more than 70 countries, representing 85% of the world's advertising spending. In addition, Nielsen collects Internet usage and advertising information through Nielsen//NetRatings. More information is available at www.nielsenmedia.com.

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