



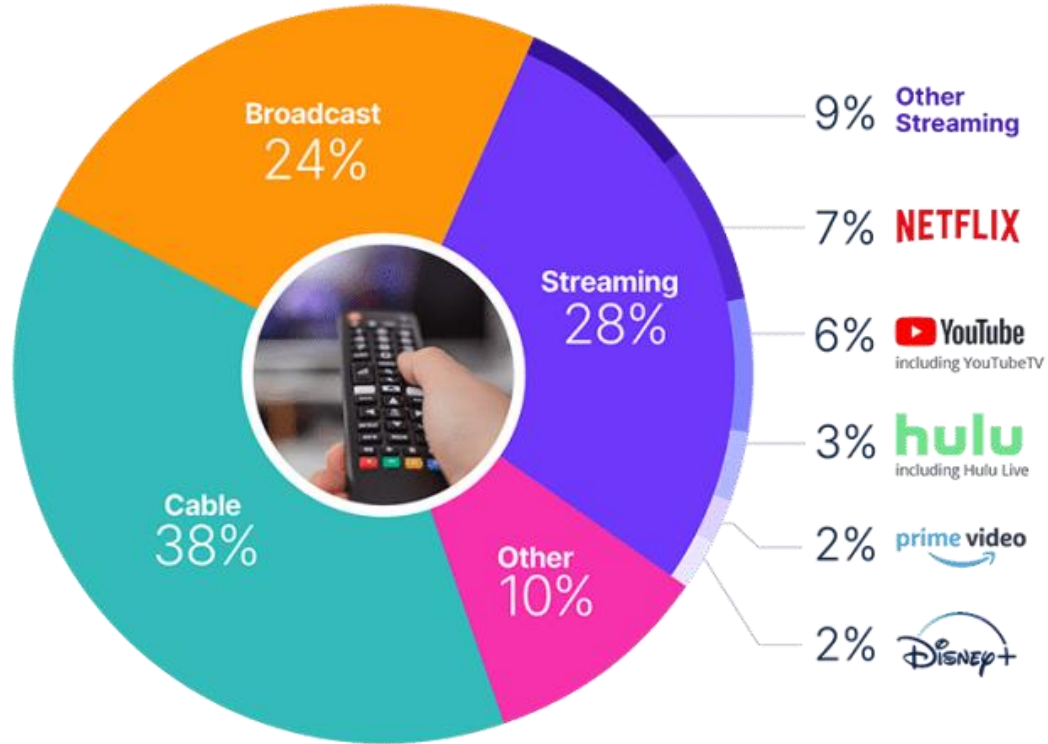
# OPTIMIZING POLITICAL CAMPAIGNS TO WIN IN NOVEMBER

Tony Hereau  
VP-Cross Platform Insights, Nielsen  
tony.hereau@nielsen.com  
1/30/24

# THE GAUGE

August 2021

Total Day  
Persons 2+

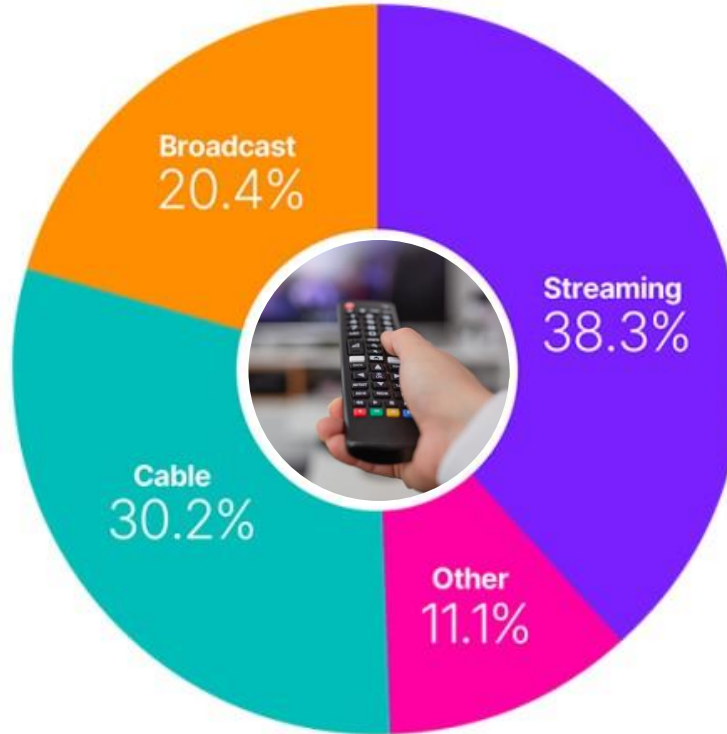


# THE GAUGE



August 2023

Total Day | Persons 2+

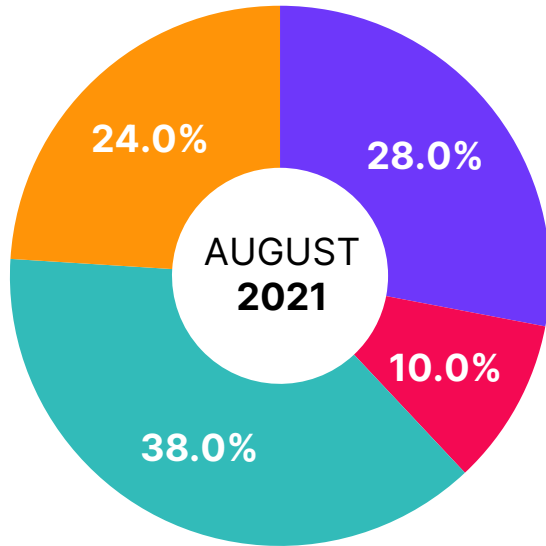


- 5.2% Other Streaming
- 9.1% YouTube Main
- 8.2% NETFLIX
- 3.6% hulu SVOOD
- 3.4% prime video
- 2.0% Disney+
- 1.3% tubi
- 1.3% max
- 1.2% peacock
- 1.1% Roku Channel
- 1.1% Paramount+
- 0.9% pluto

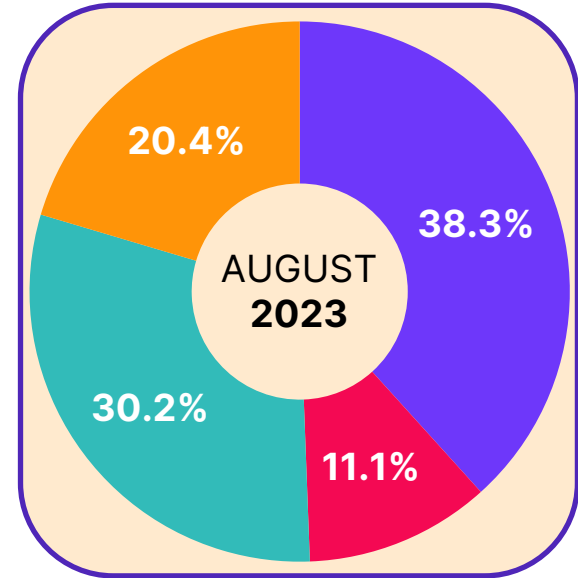
# MAJOR DISRUPTION IN THE TV LANDSCAPE

Streaming Video increasing while Broadcast and Cable TV usage shrinks

Share of Time Spent with All Video Entertainment



- Streaming Video
- Other
- Cable TV
- Broadcast TV







Source: Nielsen Gauge, Persons 2+, Total Day

# MATCHING VOTERS WITH MEDIA CONSUMPTION

“First of its kind” study based on **actual voter activity** matched to Nielsen panelists

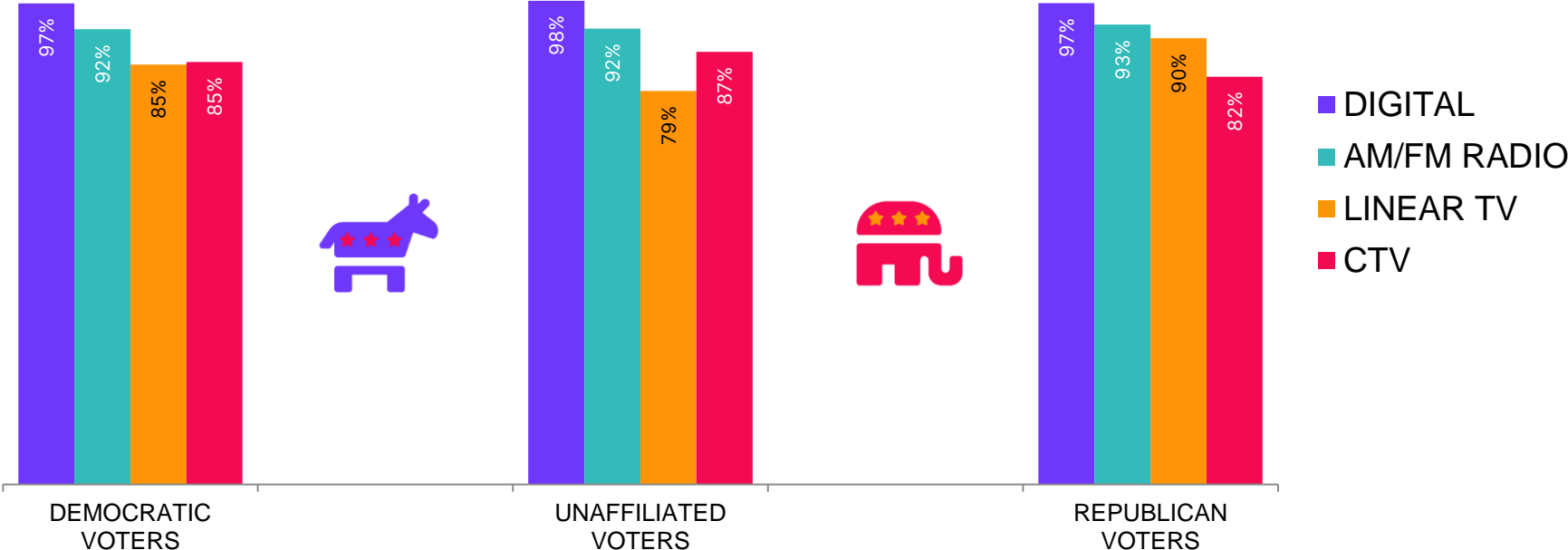


**L2 VOTER DATA:**  
Actual voter behavior  
is matched to Nielsen  
panelists at the  
individual level.  
Media consumption  
can now be viewed  
by voter types

DIGITAL 	LINEAR TV 
AM/FM RADIO 	CONNECTED TV 

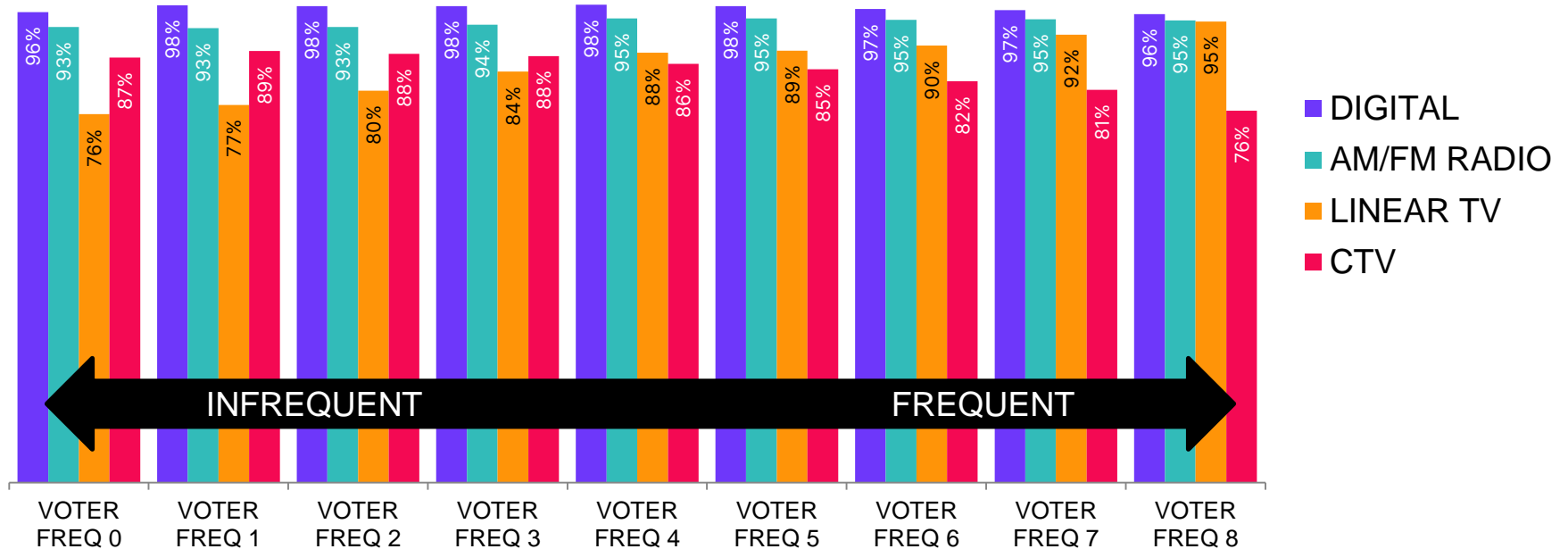
Source: Nielsen Media Impact, Linear TV = Broadcast and Cable TV, Connected TV = YouTube, Netflix, Hulu, Amazon Prime, etc with or without ads, AM/FM Radio does not include Spotify, Pandora, iTunes, etc., Digital = Search, Social, Open Web, etc.

# AM/FM RADIO AND DIGITAL MEDIA EXCEED TV FOR REACHING PARTY VOTERS



Source: Nielsen L2 Voter data, Sept 2023, Monthly Reach by media for voters by party

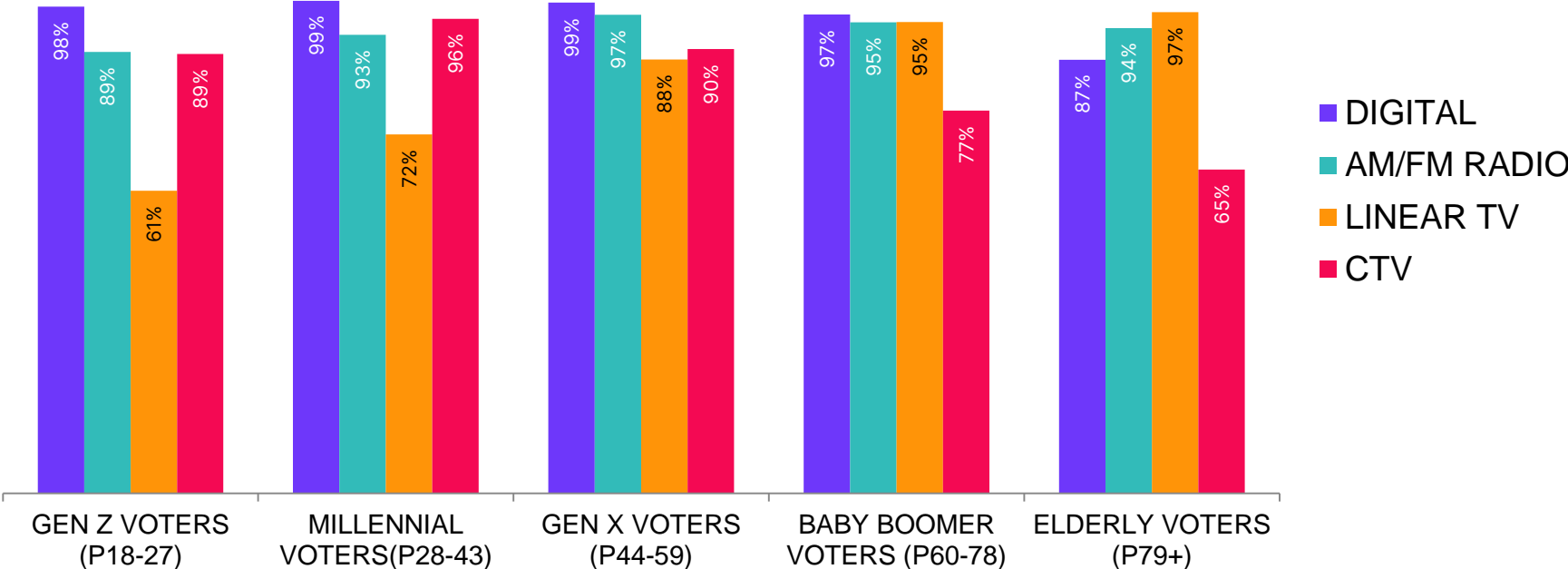
# RADIO AND DIGITAL MEDIA EXCEED TV FOR REACHING VOTERS OF ALL KINDS



Source: Nielsen L2 Voter data, Sep 2023, Monthly Reach by media for voters in the past X elections

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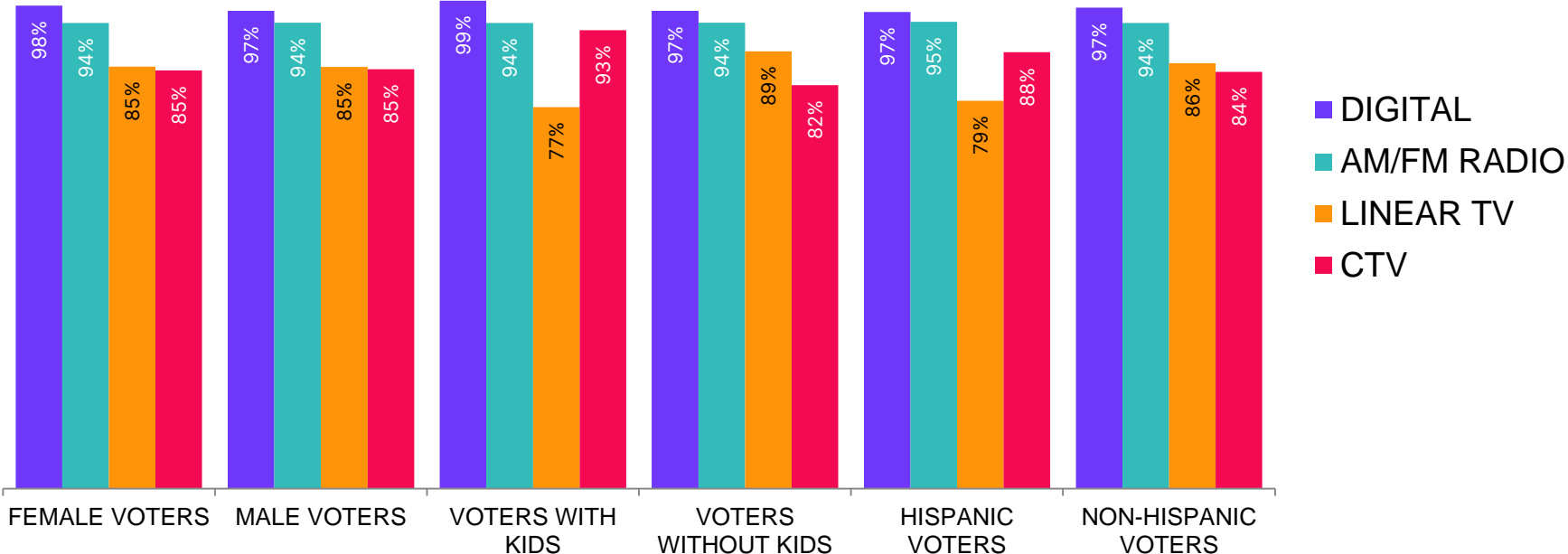
# RADIO AND DIGITAL MEDIA EXCEED TV FOR REACHING VOTERS OF ALL AGES



Source: Nielsen L2 Voter data, Sep 2023, Monthly Reach by media for voters by generational age segment

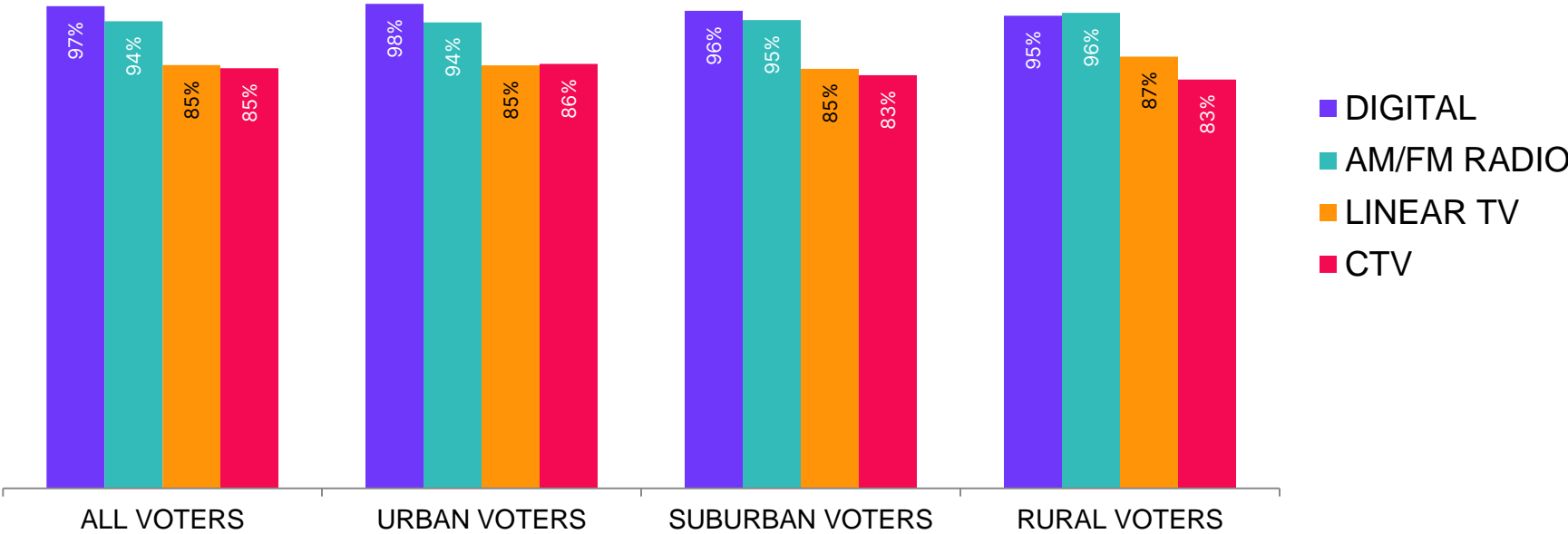


# RADIO AND DIGITAL MEDIA EXCEED TV BY GENDER, ETHNICITY AND AMONG FAMILIES



Source: Nielsen L2 Voter data, Sept 2023, Monthly Reach by media for voters by gender, presence of children and Hispanic identity

# RADIO AND DIGITAL MEDIA EXCEED TV FOR REACHING VOTERS BY GEOGRAPHY



Source: Nielsen L2 Voter data, Sep 2023, Monthly Reach by media for voters by county population (size A & B combined for "Urban" definition)

# NEW INSIGHTS ON MEDIA AUDIENCES

A free report from Nielsen identifying strategies that resonate with consumers



- Survey of 3000 US adults 18+ conducted in April 2023

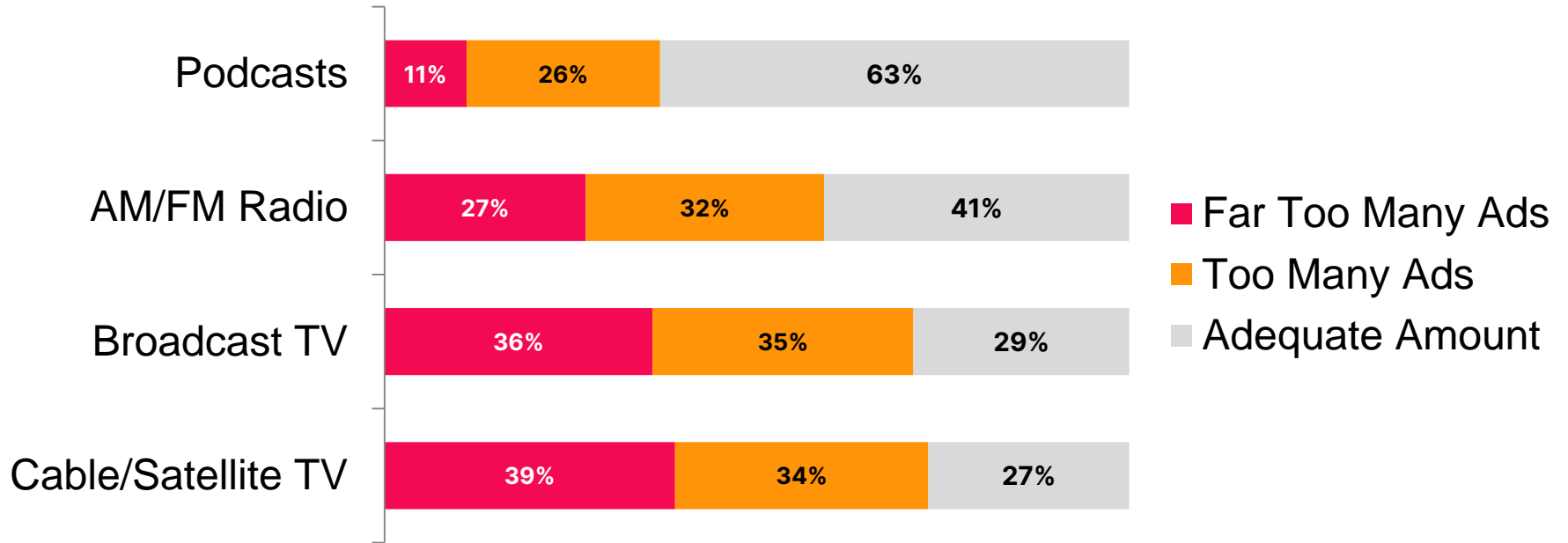
## MAIN TOPICS

- Changing Media Habits
- Personalization Tactics
- Ad Avoidance

Source: Nielsen, November 2023 - <https://www.nielsen.com/wp-content/uploads/sites/2/2023/11/2023-Consumer-Survey-Report.pdf>

# OVER 70% FEEL TV HAS TOO MANY ADS, AM/FM AND PODCASTING ARE LESS CLUTTERED

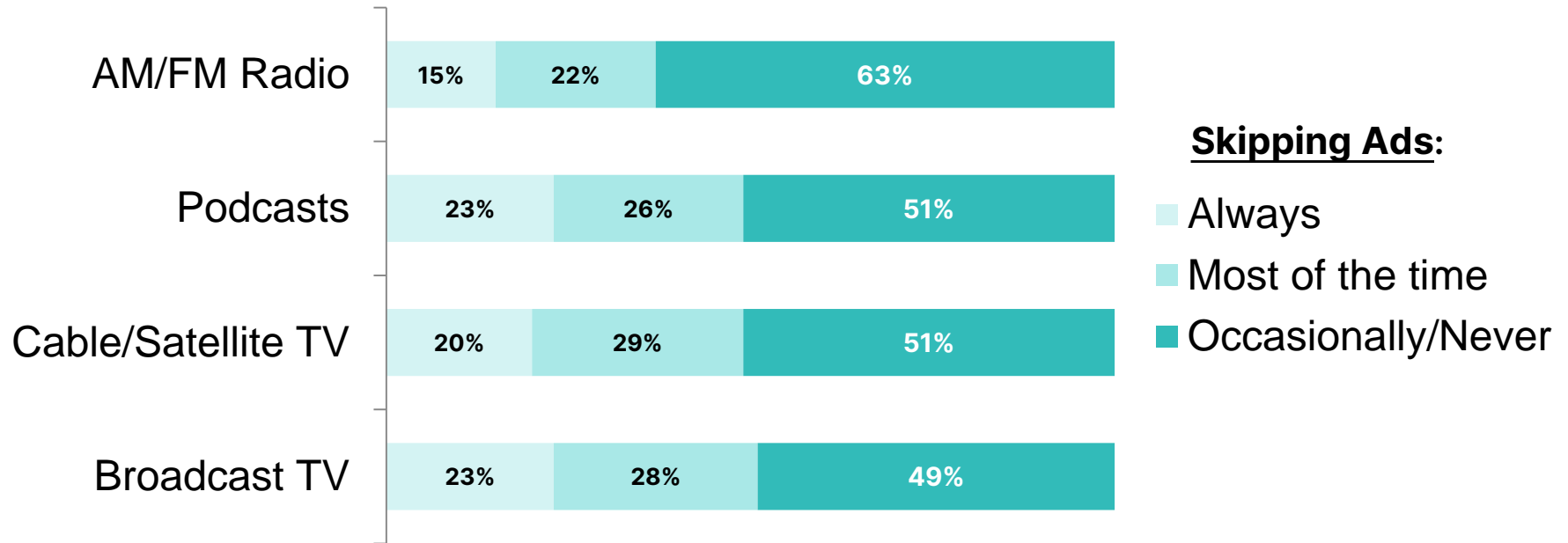
Advertising will perform better in a less crowded environment on AM/FM Radio and Podcasting



Source: Nielsen 2023 Consumer Survey Report, 3,000 Adults 18+ surveyed April 2023: What do you think of the overall amount of advertising on each of the following?

# AM/FM RADIO HAS LOWER LEVELS OF AD AVOIDANCE COMPARED TO TELEVISION

Advertising will perform better when consumers are less likely to skip the ads



Source: Nielsen 2023 Consumer Survey Report, 3,000 Adults 18+ surveyed April 2023: How often do you intentionally take action to avoid ads on each of the following?

# SPOTLIGHT ON MULTIMEDIA CAMPAIGNS



# NIELSEN MEDIA IMPACT

PROFESSIONAL GRADE MEDIA PLANNING SYSTEM USED BY ALL MAJOR AD AGENCIES

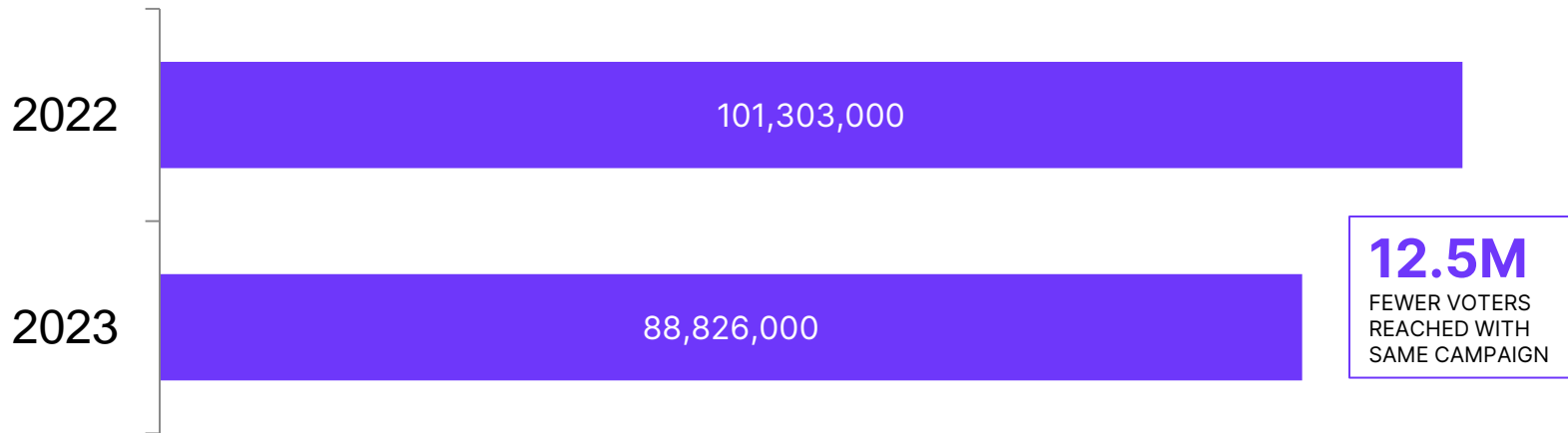
- Advanced media planning system built on **currency data** from TV, Radio, Digital, Print and more
- Leveraging fusion datasets to understand how different forms of **media work together** to achieve campaign goals
- Allows planners to **optimize a campaign** by a number of factors including budget, reach and frequency



# THE SAME CAMPAIGN IN 2022 DELIVERS 12% LESS REACH FOR TV AND DIGITAL IN 2023

Budget: \$15M / 50% Broadcast TV / 15% Cable TV / 10% CTV / 25% Digital / 0% Radio

Voters Reached - 1 Month Campaign

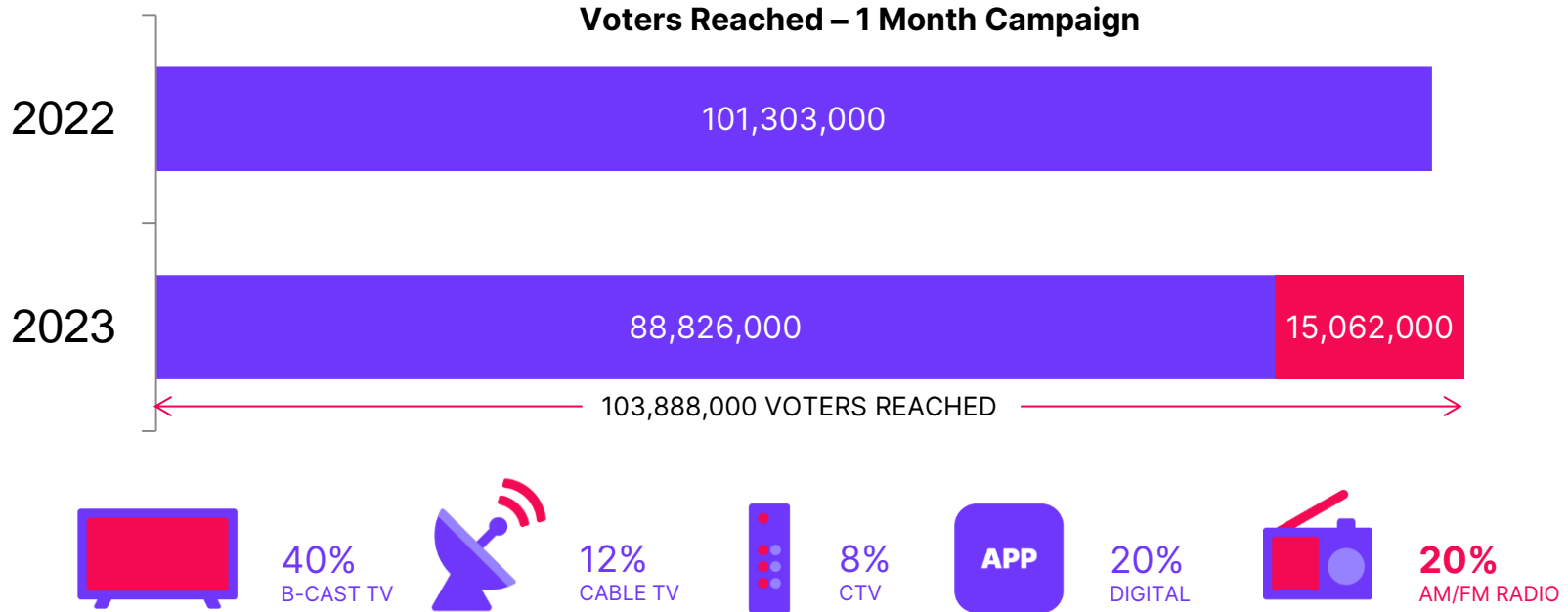


Source: Nielsen Media Impact, P18+ Registered Voters / CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube  
Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!



# AM/FM RADIO FILLS THE TV REACH GAP IN 2023

Campaigns should include AM/FM Radio to deliver the same reach for the same budget



Source: Nielsen Media Impact, P18+ Registered Voters / CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube  
Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!

How would a multimedia  
campaign perform if  
**20% were shifted to radio?**

# WHAT WOULD A TYPICAL POLITICAL CAMPAIGN DELIVER FOR ONE MONTH

LINEAR TV	\$9,750,000	65%
CTV	\$1,500,000	10%
DIGITAL	\$3,750,000	25%
AM/FM RADIO	\$0	0%

## 1 MONTH CAMPAIGN

Reach %	<b>65.6%</b>
Net Reach	<b>88,826,000</b>
Frequency	<b>5.8</b>
Impressions	<b>517,718,000</b>
CPM	<b>\$29</b>
Budget	<b>\$15,000,000</b>

## TYPICAL MEDIA PLAN

Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion) CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube  
 Linear TV = Broadcast & Cable TV, Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!

# WHAT HAPPENS IF AM/FM RADIO REPRESENTS 20% OF THE POLITICAL CAMPAIGN?

LINEAR TV	\$7,800,000	52%
CTV	\$1,200,000	8%
DIGITAL	\$3,000,000	20%
AM/FM RADIO	\$3,000,000	20%

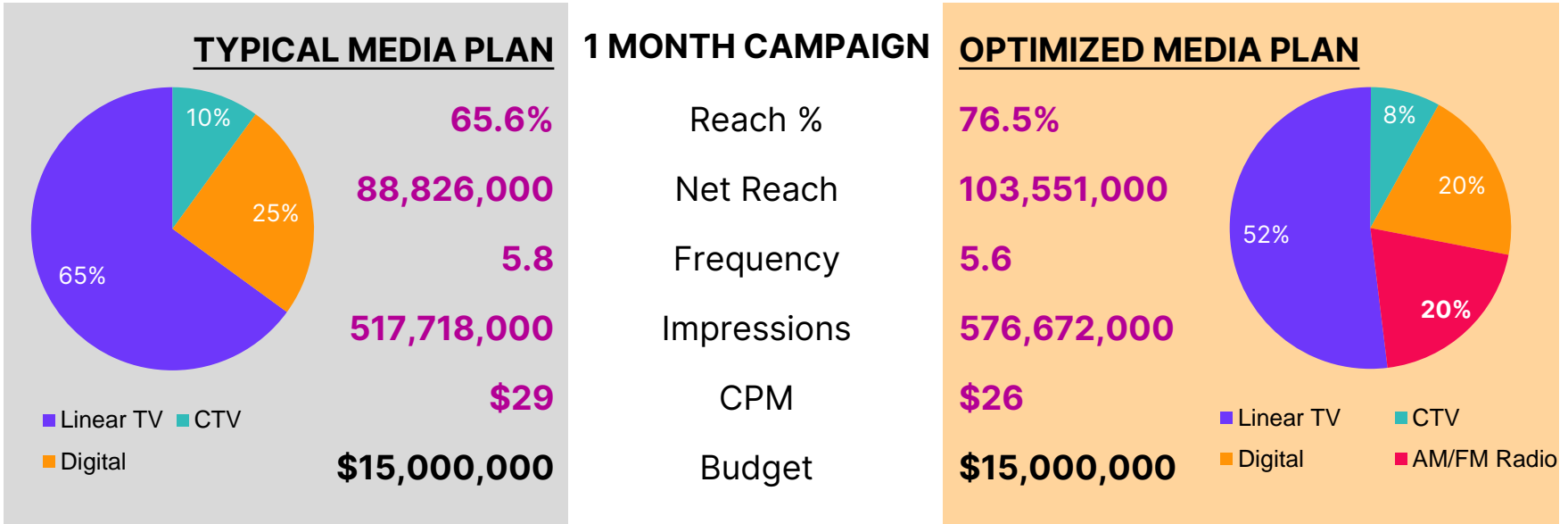
## 1 MONTH CAMPAIGN

Reach %	<b>76.5%</b>
Net Reach	<b>103,551,000</b>
Frequency	<b>5.6</b>
Impressions	<b>576,672,000</b>
CPM	<b>\$26</b>
Budget	<b>\$15,000,000</b>

## OPTIMIZED MEDIA PLAN

Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion) CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube  
 Linear TV = Broadcast & Cable TV, Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!

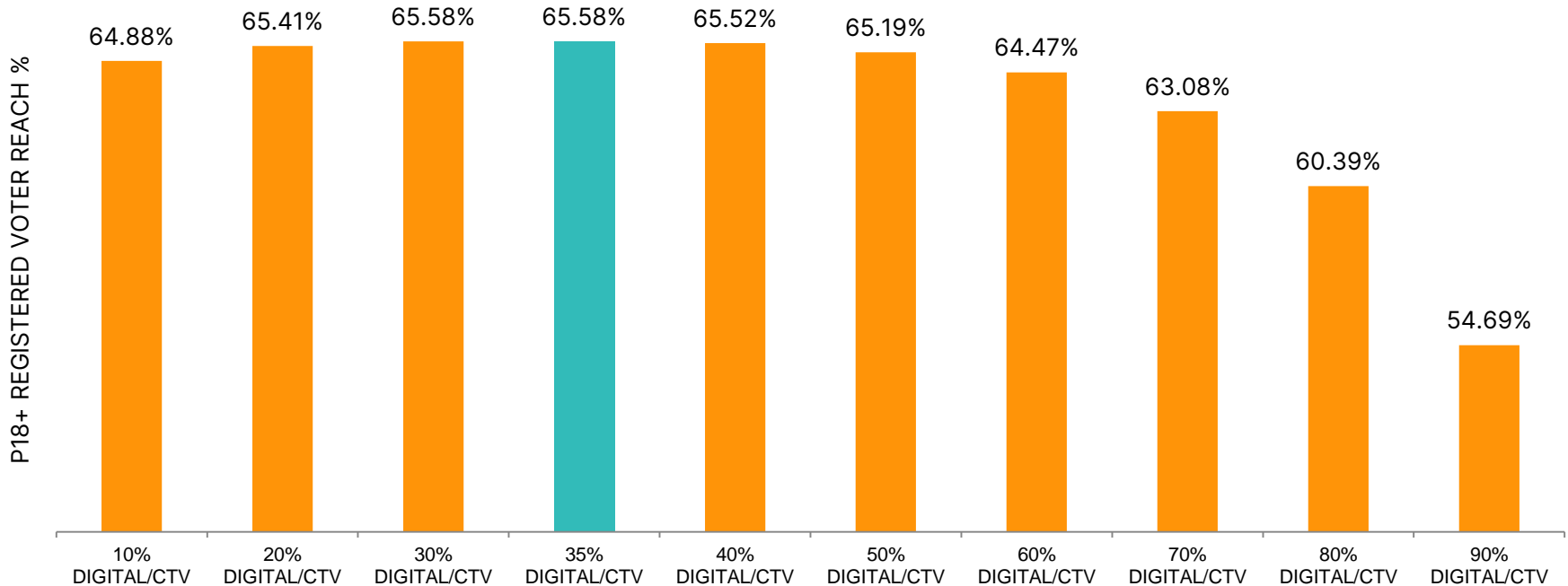
# A 20% ALLOCATION TO RADIO REACHES 15 MILLION MORE VOTERS (+17%) FOR NO ADDITIONAL COST



Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion) CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube  
 Linear TV = Broadcast & Cable TV, Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!

# DIMINISHING RETURNS WITH MORE DIGITAL/CTV SPEND

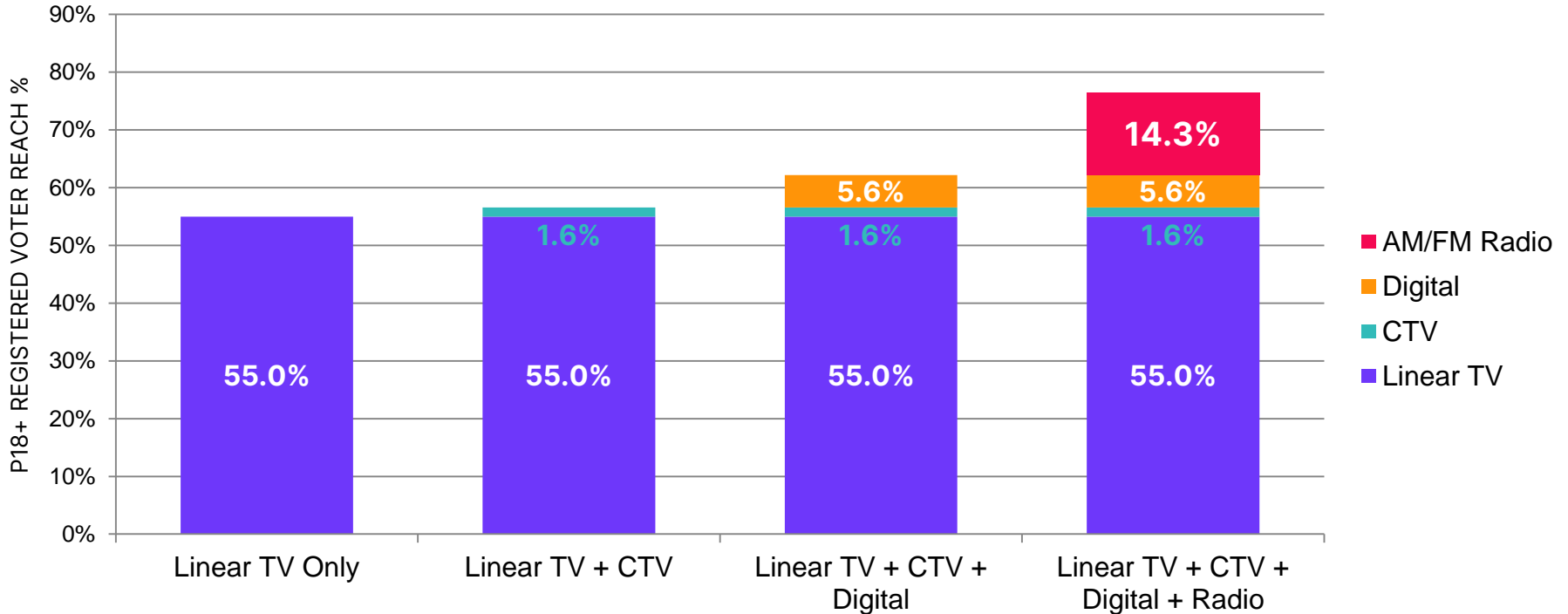
SHIFTING MORE BUDGET TO CTV & DIGITAL MEDIA WILL REDUCE TOTAL CAMPAIGN REACH



Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion) CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube  
Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!

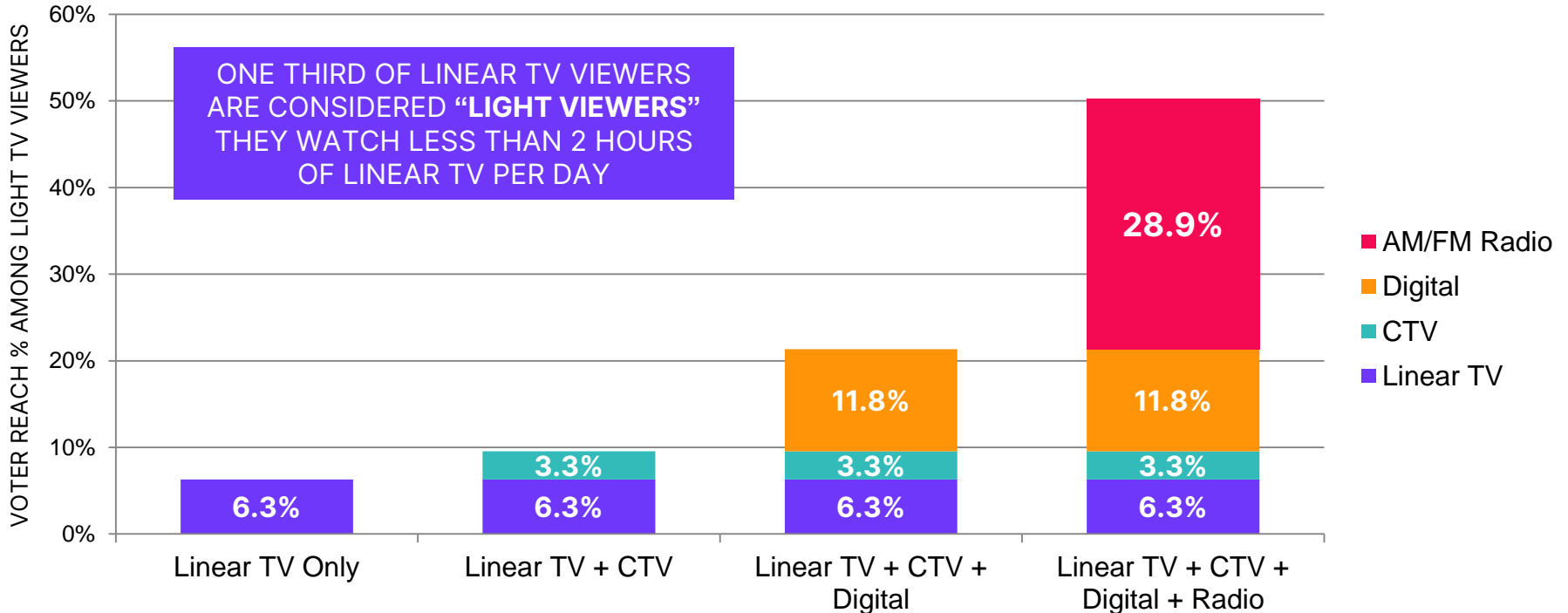
# AM/FM RADIO BOOSTS CAMPAIGN REACH

RADIO ADDS OVER 14 POINTS OF INCREMENTAL REACH BEYOND TV, CTV & DIGITAL



Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion) CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube  
Linear TV = Broadcast & Cable TV, Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!

# AMONG LIGHT TV VIEWERS, AM/FM RADIO ADDS THE MOST INCREMENTAL REACH (NOT DIGITAL OR CTV)

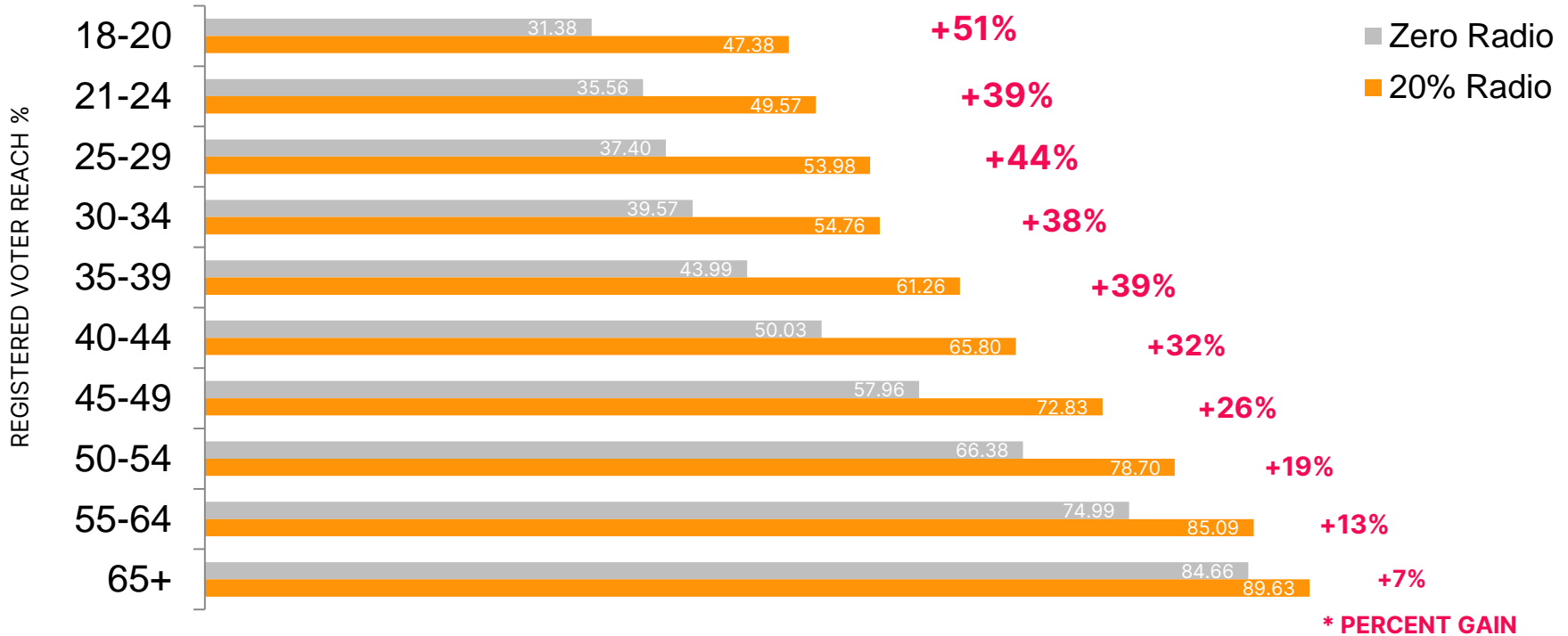


Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion) CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube  
 Linear TV = Broadcast & Cable TV, Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!



# AM/FM BRINGS IN THE YOUNGER END OF THE DEMO

RADIO IS ESSENTIAL TO THE MEDIA PLAN IF YOU WANT TO REACH YOUNG VOTERS

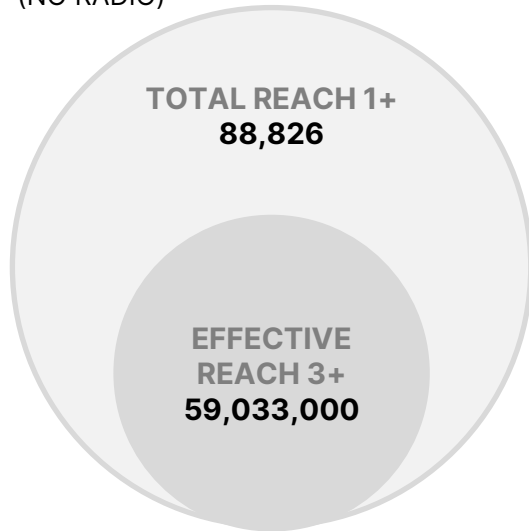


Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion) CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube Linear TV = Broadcast & Cable TV, Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!

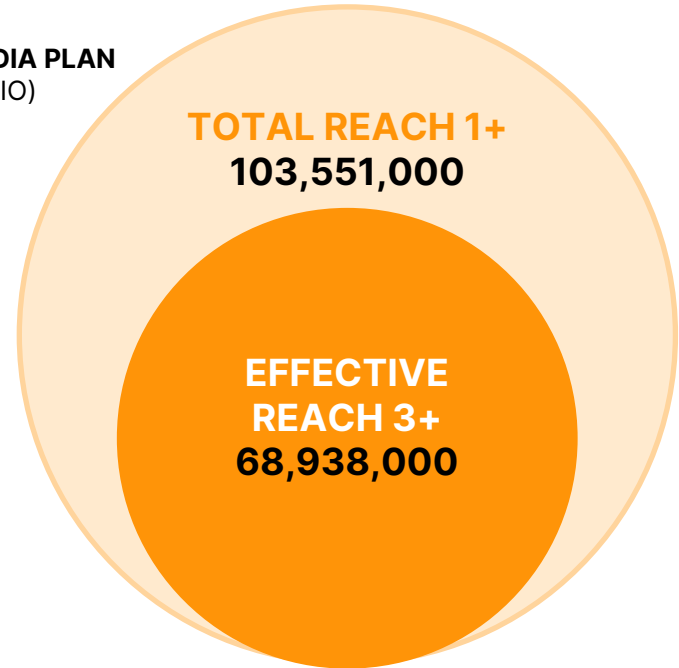
# RADIO MAKES YOUR TV AND DIGITAL BUYS BETTER

10 MILLION MORE VOTERS REACHED 3 OR MORE TIMES BY ADDING AM/FM RADIO

**TYPICAL MEDIA PLAN**  
(NO RADIO)



**OPTIMIZED MEDIA PLAN**  
(20% RADIO)



**17%**

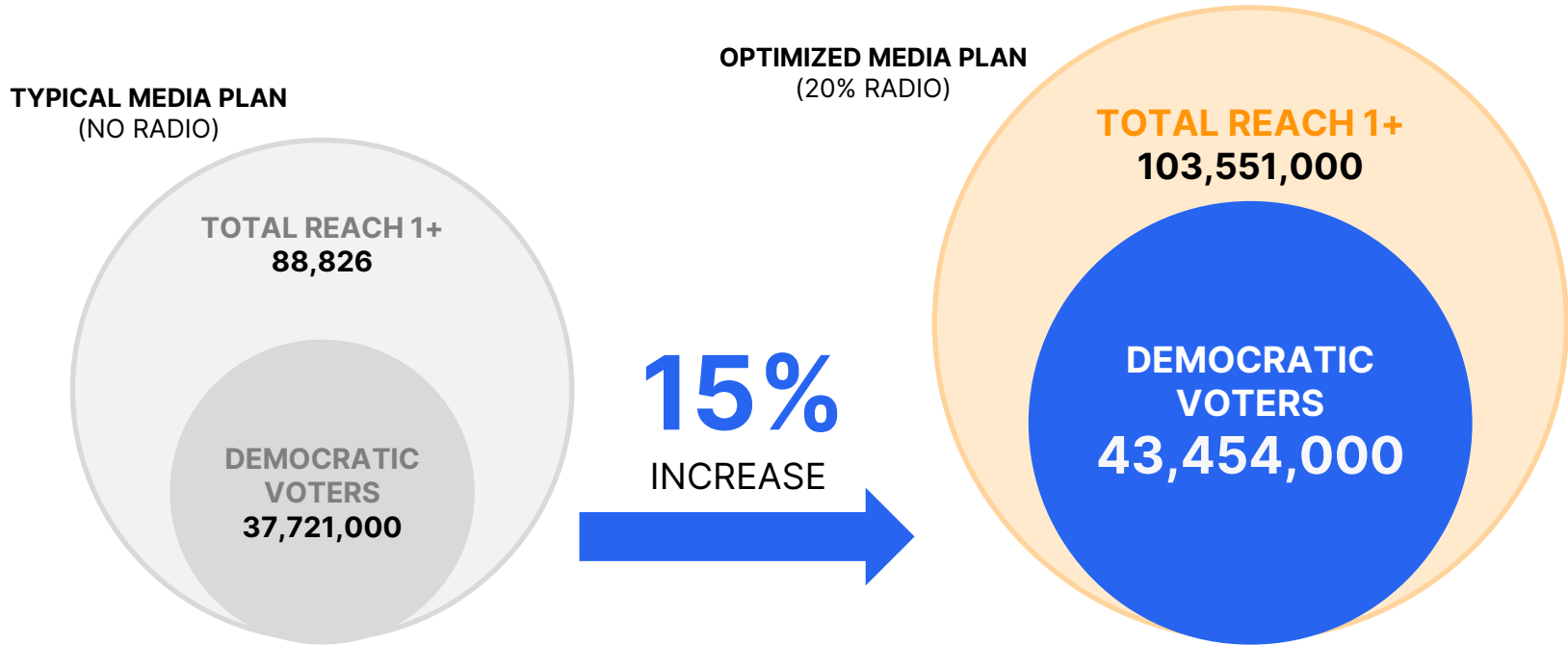
INCREASE



Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion)

# RADIO REACHES 15% MORE DEMOCRATIC VOTERS

5.7 MILLION MORE DEMOCRATIC VOTERS REACHED BY ADDING AM/FM RADIO

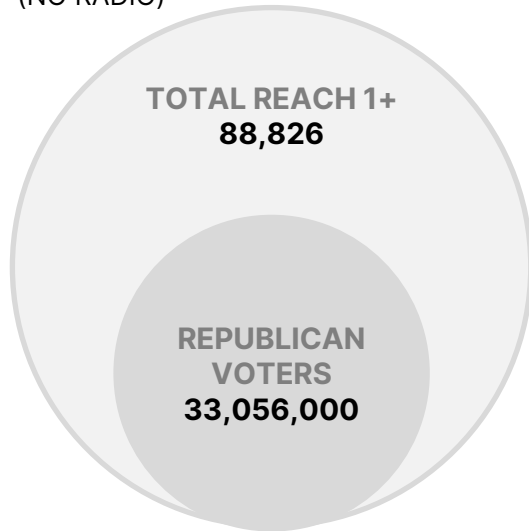


Source: Nielsen Media Impact, P18+ Registered Voters & Democratic Voters (Sept 2023 Fusion)

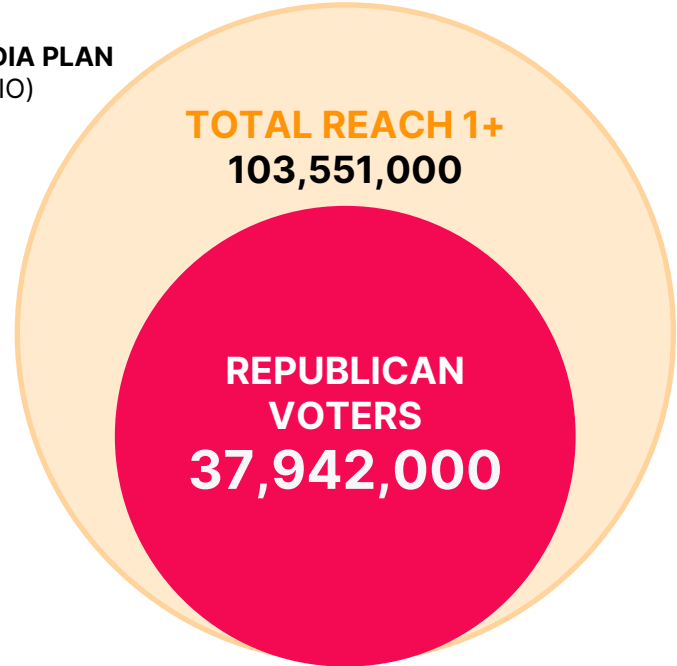
# RADIO REACHES 15% MORE REPUBLICAN VOTERS

4.9 MILLION MORE REPUBLICAN VOTERS REACHED BY ADDING AM/FM RADIO

**TYPICAL MEDIA PLAN**  
(NO RADIO)



**OPTIMIZED MEDIA PLAN**  
(20% RADIO)



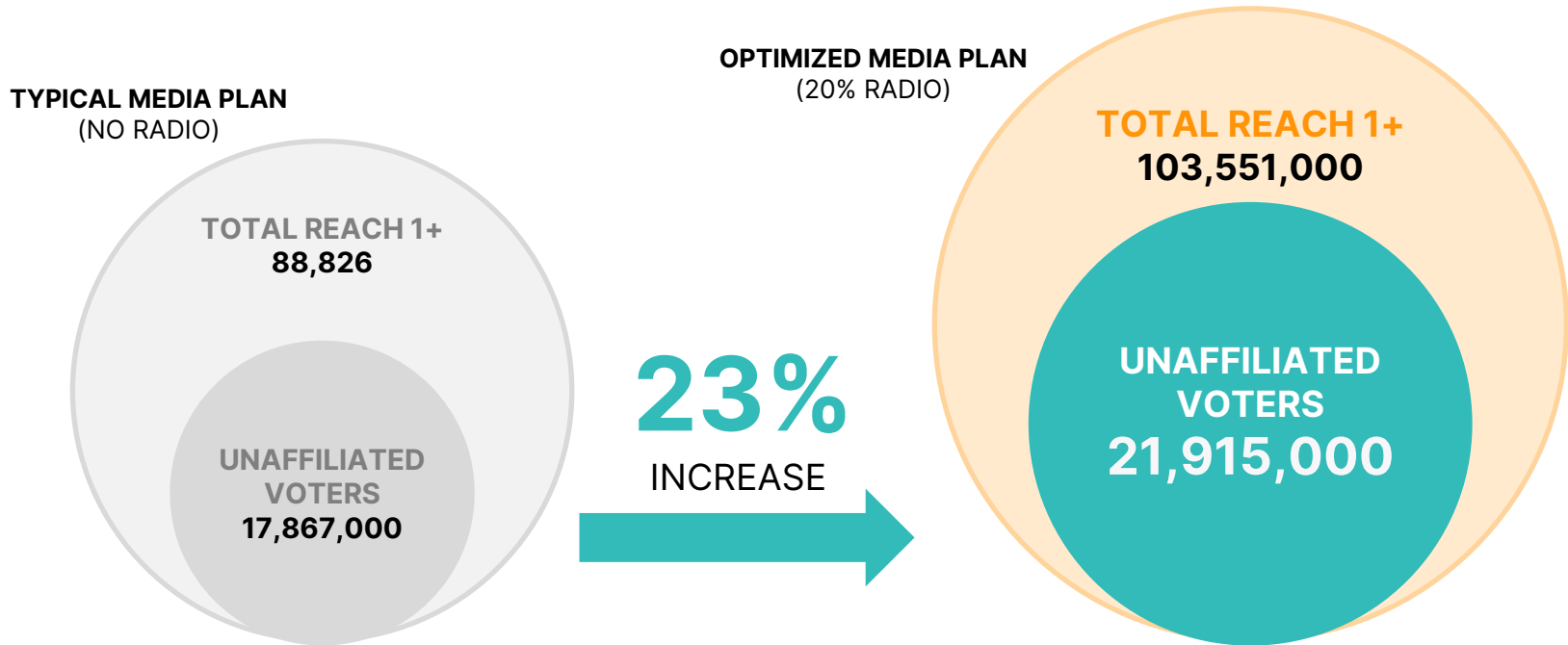
**15%**  
INCREASE



Source: Nielsen Media Impact, P18+ Registered Voters & Republican Voters (Sept 2023 Fusion)

# RADIO REACHES 23% MORE UNAFFILIATED VOTERS

4 MILLION MORE UNAFFILIATED VOTERS REACHED BY ADDING AM/FM RADIO



Source: Nielsen Media Impact, P18+ Registered Voters & Unaffiliated/Independent Voters (Sept 2023 Fusion)

# SPOTLIGHT ON SUCCESSFUL LOCAL RACES



# MANY SENATE WINNERS USED RADIO OFTEN IN 2022

State	2022 Senatorial Winners	Radio Advertising Support	Radio Start Date	Weeks before election
Arizona	Mark Kelly (D)	Yes	9-Aug	13
Pennsylvania	John Fetterman (D)	Yes	9-Aug	13
Wisconsin	Ron Johnson (R)	Yes	13-Aug	12
Nevada	Catherine Cortez Masto (D)	Yes	17-Aug	12
Georgia	Raphael Warnock (D) / Herschel Walker (R)	Yes	Runoff	9
North Carolina	Ted Budd (R)	Yes	6-Sep	9
Ohio	J.D. Vance (R)	Yes	6-Sep	9
Arkansas	John Boozman (R)	Yes	15-Sep	8
Kentucky	Rand Paul (R)	Yes	15-Sep	8
New Hampshire	Maggie Hassan (D)	Yes	15-Sep	8
Louisiana	John Kennedy (R)	Yes	30-Sep	6
Washington	Patty Murray (D)	Yes	5-Oct	5
Hawaii	Brian Schatz (D)	Yes	6-Oct	5
Connecticut	Richard Blumenthal (D)	Yes	12-Oct	4
Illinois	Tammy Duckworth (D)	Yes	13-Oct	4
Florida	Marco Rubio (R)	Yes	14-Oct	4
Utah	Mike Lee (R)	Yes	19-Oct	3
Kansas	Jerry Moran (R)	Yes	26-Oct	2
Iowa	Chuck Grassley (R)	Yes	27-Oct	2
New York	Chuck Schumer (D)	Yes	4-Nov	1

# WINNING GOVERNORS USED RADIO OFTEN IN 2022

State	2022 Gubernatorial Winners	Radio Advertising Support	Radio Start Date	Weeks before election
Michigan	Gretchen Whitmer (D)	Yes	16-Aug	12
Connecticut	Ned Lamont (D)	Yes	17-Aug	12
Texas	Greg Abbott (R)	Yes	30-Aug	10
Illinois	J.B. Pritzker (D)	Yes	1-Sep	10
Kansas	Laura Kelly (D)	Yes	6-Sep	9
Arkansas	Sarah Huckabee Sanders (R)	Yes	9-Sep	9
Iowa	Kim Reynolds (R)	Yes	21-Sep	7
New Mexico	Lujan Grisham (D)	Yes	21-Sep	7
Pennsylvania	Josh Shapiro D	Yes	22-Sep	7
Tennessee	Bill Lee (R)	Yes	11-Oct	4
Arizona	Katie Hobbs (D)	Yes	12-Oct	4
Wisconsin	Tony Evers (D)	Yes	15-Oct	3
Maryland	Wes Moore (D)	Yes	18-Oct	3
Oklahoma	Kevin Stitt (R)	Yes	20-Oct	3
Nevada	Joe Lombardo (R)	Yes	24-Oct	3
Georgia	Brian Kemp (R)	Yes	26-Oct	2
Florida	Ron DeSantis (R)	Yes	29-Oct	2
Ohio	Mike DeWine (R)	Yes	31-Oct	1
New York	Kathy Hochul D	Yes	2-Nov	1



# SPOTLIGHT ON THREE UNIQUE RACES

Analyzing the TV and Radio spend at the local level during 2022 campaigns



Nevada

## RACE FOR GOVERNOR

**Joe Lombardo (R)**

8/8/22 – 11/8/22

**\$512,527** Total Spend  
In Las Vegas

**4%** AM/FM Radio  
**5%** Connected TV  
**91%** Broadcast/CableTV



Pennsylvania

## RACE FOR SENATE

**John Fetterman (D)**

8/8/22 – 11/8/22

**\$13,865,705** Total Spend  
In Pittsburgh & Philadelphia

**14%** AM/FM Radio  
**8%** Connected TV  
**78%** Broadcast/CableTV



Georgia

## RUNOFF ELECTION

**Raphael Warnock (D)**

11/8/22 – 12/6/22

**\$4,503,037** Total Spend  
In Atlanta

**24%** AM/FM Radio  
**5%** Connected TV  
**72%** Broadcast/CableTV

Source: Nielsen Ad Intel for Las Vegas, Pittsburgh, Philadelphia & Atlanta 8/8/22 – 12/6/22 (independent expenditures excluded)

# RADIO LIFTS NEVADA CAMPAIGN BY 10%

Local AM/FM Radio reaches **98,000 more voters** not reached by TV or CTV

ACTUAL MEDIA PLAN  
(4% RADIO)



Nevada

RACE FOR GOVERNOR

Joe Lombardo (R)

8/8/22 – 11/8/22

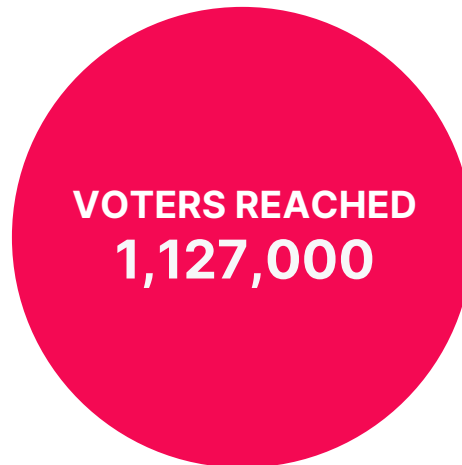
**\$512,527** Total Spend  
In Las Vegas

**4%** AM/FM Radio  
**5%** Connected TV  
**91%** Broadcast/CableTV

100% TV/CTV  
(NO RADIO)



**10%**  
INCREASE  
  
**98K**  
MORE VOTERS



OUTCOME: Joe Lombardo defeats incumbent Steve Sisolak by **13,965** votes

Source: Nielsen Media Impact, Philadelphia & Pittsburgh DMAs, P18+ Registered Voters (independent expenditures excluded)

# RADIO LIFTS PENNSYLVANIA CAMPAIGN BY 10%

Local AM/FM Radio reaches **676,000 more voters** not reached by TV or CTV

**ACTUAL MEDIA PLAN**  
(14% RADIO)



Pennsylvania

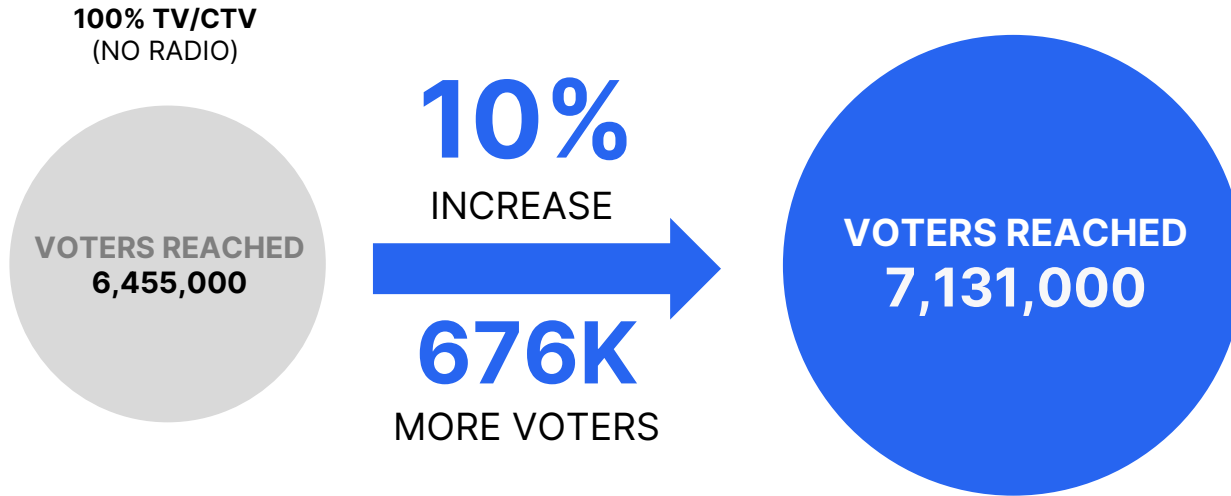
**RACE FOR SENATE**

**John Fetterman (D)**

8/8/22 – 11/8/22

**\$13,865,705** Total Spend  
In Pittsburgh & Philadelphia

**14%** AM/FM Radio  
**8%** Connected TV  
**78%** Broadcast/CableTV



**OUTCOME:** John Fetterman defeats Mehmet Oz by **263,752** votes

Source: Nielsen Media Impact, Philadelphia & Pittsburgh DMAs, P18+ Registered Voters (independent expenditures excluded)

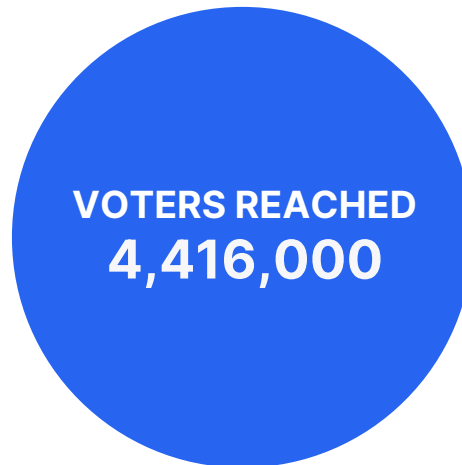
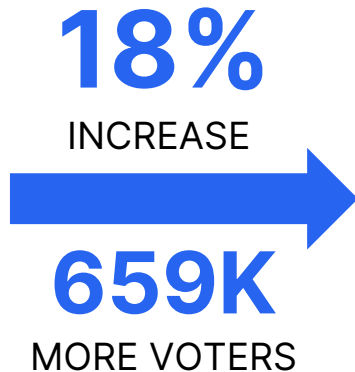
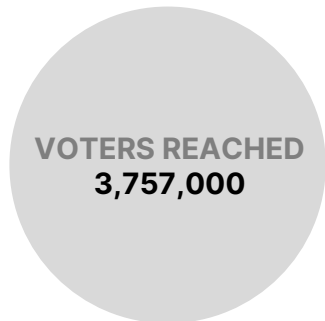
# RADIO LIFTS GEORGIA CAMPAIGN BY 18%

Local AM/FM Radio reaches **659,000 more voters** not reached by TV or CTV

ACTUAL MEDIA PLAN  
(24% RADIO)



100% TV/CTV  
(NO RADIO)



**RUNOFF ELECTION**

**Raphael Warnock (D)**

11/8/22 – 12/6/22

**\$4,503,037** Total Spend  
In Atlanta

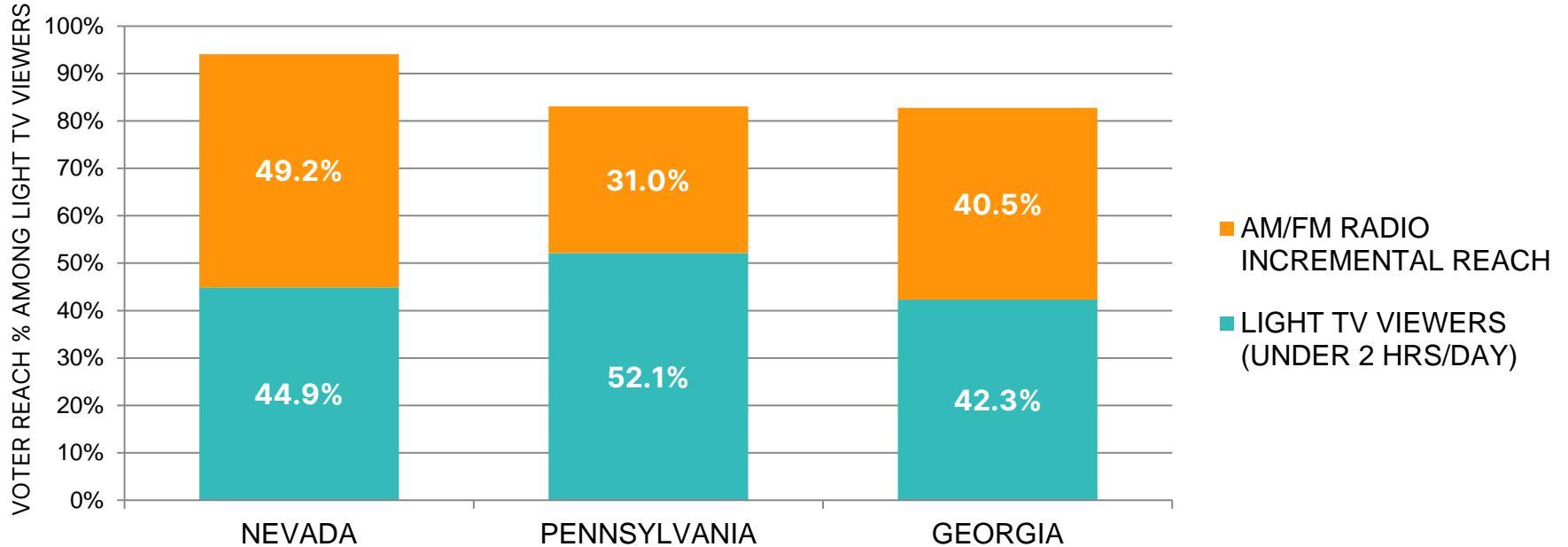
**24%** AM/FM Radio  
**5%** Connected TV  
**72%** Broadcast/CableTV

OUTCOME: Raphael Warnock defeats Herschel Walker by **96,613** votes

Source: Nielsen Media Impact, Atlanta DMA, P18+ Registered Voters (independent expenditures excluded)

# RADIO CAN DOUBLE THE REACH OF LIGHT TV VIEWERS IN LOCAL CAMPAIGNS

By including AM/FM Radio, the campaigns influenced voters who watch little to no TV



Source: Nielsen Media Impact, P18+ Sept 2022 4-week period, Registered Voters for Las Vegas, Pittsburgh, Philadelphia & Atlanta

# PRO TIP: USE RADIO EARLY AND OFTEN

Greater Incremental Reach when AM/FM Radio is used for more than one week



**Joe Lombardo (R)**  
8/8/22 – 11/8/22  
**\$512,527 Total Spend**



<b>13 WEEKS</b>
<b>87% REACH</b>

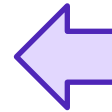
**241,000 MORE VOTERS REACHED**



ACTUAL

<b>3 WEEKS</b>
<b>77% REACH</b>

**98,000 MORE VOTERS REACHED**



<b>1 WEEKS</b>	<b>0 WEEKS</b>
<b>71% REACH</b>	<b>70% REACH</b>

**12,000 MORE VOTERS REACHED**

**ELECTION DAY**



# MAIN TAKEAWAYS

LINEAR TV IS LOSING VOTER REACH

---

RADIO AND DIGITAL MEDIA REACH THE MOST VOTERS

---

20% TO RADIO REACHES MORE VOTERS AT NO EXTRA COST

---

USE RADIO EARLY AND OFTEN FOR MAXIMUM LIFT

