



The Nielsen Company
770 Broadway, New York, NY 10003
www.nielsen.com

Client Communication

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Nielsen Monitor-Plus™ Spotlight: 2007-2008 Political Advertising

With the 2008 presidential primaries and caucuses finally completed and the general campaign just around the corner, Nielsen Monitor-Plus™, a service of The Nielsen Company, takes a closer look at political advertising.

Early Advertisers

Republican candidate Mitt Romney was the first presidential contender to launch television advertising; his first TV spots ran in February 2007—well ahead of any of the other candidates. John Edwards, who began running television ads in May 2007, was the first Democratic candidate to place TV advertising.

Among the three leading Democratic and Republican contenders, Barack Obama was the first to launch television advertising in June 2007, a little more than six months before the first caucus in Iowa. Hillary Clinton followed, launching her TV ads in August 2007, while John McCain, the presumptive Republican presidential nominee, waited until the end of September 2007 to begin his TV ad campaigns.

Top Advertisers

During the primary and caucus season, Barack Obama's campaign placed far more ads than any other contender. Between January 1, 2007 and May 18, 2008, Obama ran 154,057 TV spots nationwide. In comparison, Hillary Clinton ran 91,569 spots, while John McCain ran just 17,632 spots during the same time period.

Top 20 Political Advertisers

Advertiser	Spot TV Units
Barack Obama Campaign for President	154,057
Hillary Clinton Campaign for President	91,569
Mitt Romney Campaign for President	38,077
John McCain Campaign for President	17,632
John Edwards Campaign for President	17,327
Ron Paul Campaign for President	9,271
Mike Huckabee Campaign for President	9,045
Bill Richardson Campaign for President	8,585
Rudy Giuliani Campaign for President	6,918
Democratic National Committee	6,334
Chris Dodd Campaign for President	5,366
Republican National Committee	5,083
Fred Thompson Campaign for President	4,276
Joe Biden Campaign for President	3,644
MoveOn.org	1,418
American Federation of Labor - Congress of Industrial Organizations (AFL-CIO)	689
Sierra Club	193
Tom Tancredo Campaign for President	133
Duncan Hunter Campaign for President	120
Mike Gravel Campaign for President	68
Total	379,805

Source: Nielsen Monitor-Plus (Jan. 1, 2007 - May 18, 2008)

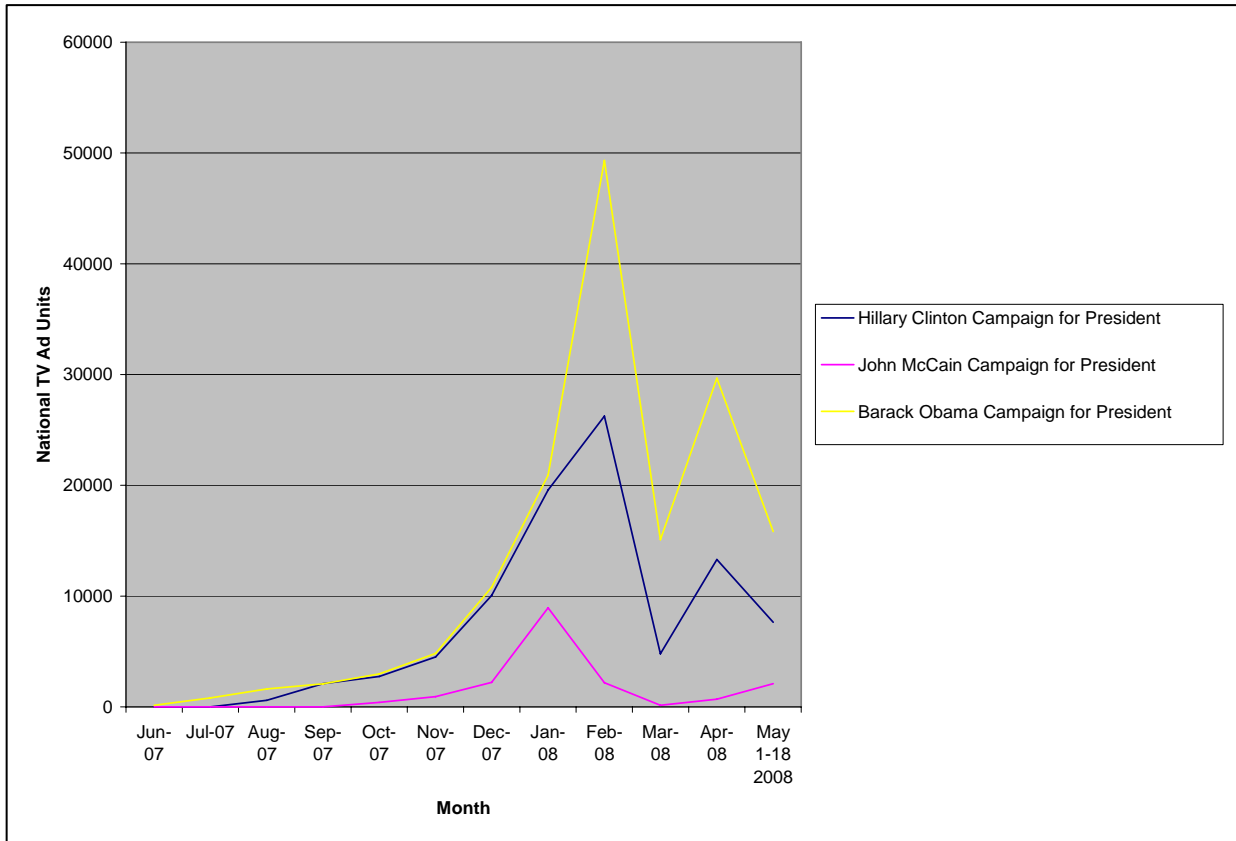
Mitt Romney made television advertising an early priority in his campaign, and although he suspended his campaign in February 2008, he managed to place more TV spots than his more successful opponent, John McCain. John Edwards also placed a significant number of TV spots (17,327)—just 305 fewer spots than McCain, before exiting the race at the end of January 2008.

So far, political organizations, including the controversial “527” groups that played a key role in the 2004 presidential election, have been slow to join the advertising fray. As of May 18, 2008, the Democratic National Committee had placed 6,334 TV spots, while the Republican National Committee had placed 5,083 spots. During the same time period, MoveOn.org was the top “527” advertiser, with 1,418 television spots. The AFL-CIO followed, with 689 spots as of May 18, 2008.

Month-By-Month Advertising Activity

In the months prior to December 2007, John McCain placed slightly more than 1,000 TV spots, while Barack Obama and Hillary Clinton—whose primary battle was already heating up—ran 12,448 and 9,951 spots, respectively.

In December 2007 and January 2008, as the three candidates prepared for the first elections in Iowa and New Hampshire, all three boosted their television advertising significantly. Obama’s TV spots jumped from 4,833 units in November 2007 to 20,913 units in January 2008, while Clinton’s spots jumped from 4,521 units in November to 19,576 units in January, and McCain’s spots shot up from 928 units in November to 8,951 units in January.



Source: Nielsen Monitor-Plus (Jan. 1, 2007 - May 18, 2008)

McCain's TV advertising tapered off to 2,170 units in February 2008, after he secured his party's de facto nomination, but Obama's and Clinton's TV advertising continued to increase, spiking at 49,313 units and 26,239 units, respectively, during that month. In March, which featured few high-profile elections, McCain ran almost no advertising, while Obama and Clinton both ran significantly fewer TV spots. But in April, the closely contested primary election in Pennsylvania prompted small spikes in the number of TV spots for both Obama and Clinton.

Along with their advertising, traffic to Obama's and Clinton's campaign websites also spiked in early 2008, according to data provided by Nielsen Online. In February, Obama's site received 3,659,000 unique visitors, while Clinton's site received 1,860,000. During the same time period, traffic to McCain's official site tapered off, dropping from a high of 1,000,000 unique visitors in January 2008 to 804,000 in April 2008.

Top Advertising Markets

Markets in the vicinity of New Hampshire and Iowa—arguably the most crucial political contests of the primary/caucus season—were targeted most by political advertisers in 2007 and 2008. Overall, the Boston, Mass. / Manchester, N.H. market was top, in terms of spot TV units (20,305 units). But when combined, markets in or adjacent to Iowa ran far more spot advertisements (71,487 units) than those in or near New Hampshire did (34,841 units). In all, five markets within Iowa claimed spots among the top 20 markets, while three markets in New Hampshire made the list.

Television markets in states with other early or hotly contested primaries or caucuses—South Carolina, Pennsylvania, Texas, Indiana, Ohio, and North Carolina—rounded out the top 20.

In almost all of the top 20 markets, Barack Obama placed more spot TV ads than either Hillary Clinton or John McCain. The only exception was the top-ranked market, Boston-Manchester, in which Clinton edged ahead of Obama by 467 units. Clinton won the New Hampshire primary, while Obama beat Clinton in the Iowa caucus.

Political Advertising: Top 20 Markets

	Market	All Spot TV Units	Obama Spot TV Units	Clinton Spot TV Units	McCain Spot TV Units
1	Boston (MA) / Manchester (NH)	20,305	3,764	4,231	2,709
2	Des Moines (IA)-Ames (IA)	19,102	4,660	3,046	177
3	Cedar Rapids (IA)-Waterloo (IA)-Iowa City (IA)-Dubuque (IA)	18,424	4,107	2,954	50
4	Sioux City (IA)	15,261	3,529	2,620	59
5	Davenport (IA)-Rock Island (IL)-Moline (IL)	11,704	3,275	2,602	0
6	Greenville (SC)-Spartanburg (SC)-Asheville (NC)-Anderson (SC)	10,185	3,485	1,186	590
7	Burlington (VT)-Plattsburgh (NY)	10,024	3,424	1,843	1,143
8	Charleston (SC)	9,165	1,562	1,058	735
9	Columbia (SC)	8,168	1,156	977	512
10	Myrtle Beach (SC)-Florence (SC)	7,332	1,519	896	633
11	Rochester (MN)-Mason City (IA)-Austin (MN)	6,996	2,296	1,839	0
12	Philadelphia (PA)	4,997	3,044	1,953	0
13	Portland (ME)-Auburn (ME)	4,512	937	882	445
14	Harrisburg (PA)-Lancaster (PA)-Lebanon (PA)-York (PA)	4,451	2,989	1,462	0
15	Indianapolis (IN)	4,321	2,845	1,476	0
16	Dallas-Ft. Worth (TX)	4,254	2,562	1,591	0
17	Houston (TX)	4,214	2,676	1,310	0
18	Pittsburgh (PA)	3,897	2,732	973	192
19	Charlotte (NC)	3,840	1,626	1,642	570
20	Cleveland (OH)-Akron (OH)-Canton (OH)	3,700	2,110	1,025	525
	Total Top 20	379,857	54,298	35,566	8,340

Source: Nielsen Monitor-Plus (Jan. 1, 2007 - May 18, 2008)

In the top three New Hampshire area markets combined, Obama placed more television spots (8,125 units) than either Clinton (6,956 units) or McCain (4,297 units). The same was true in the top five Iowa area markets, where Obama ran 17,867 TV spots, Clinton ran 13,061, and McCain ran just 286.

Unlike Obama and Clinton, who spread their spot advertising fairly evenly among the primary and caucus states, McCain ran almost a quarter of his total TV spots (4,297 units) in New Hampshire. That strategy may have paid off, as McCain's victory in that primary gave his campaign an important boost.