



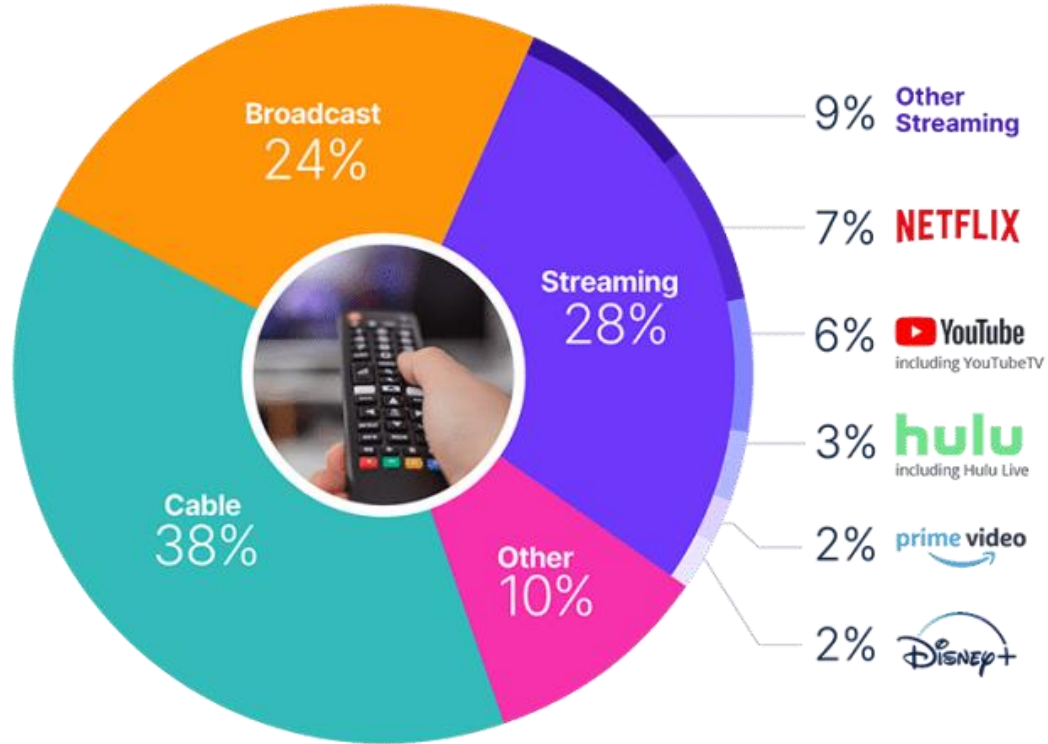
Optimizing Political Campaigns to Win in November

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The Gauge

August 2021

Total Day
Persons 2+

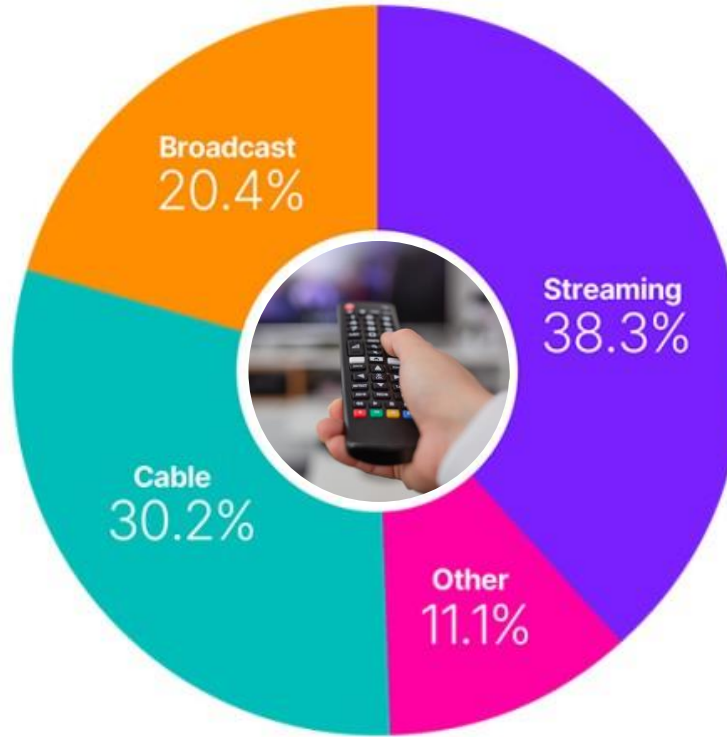


The Gauge



August 2023

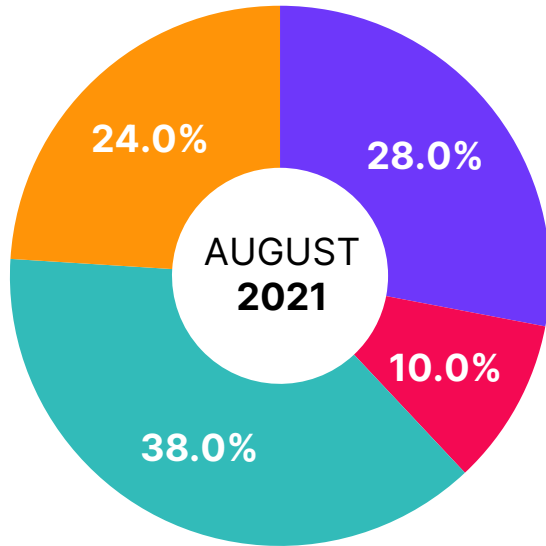
Total Day | Persons 2+



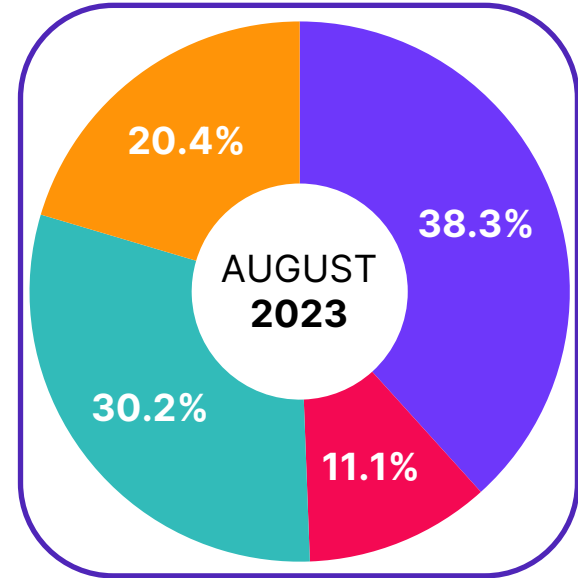
Major Disruption In The TV Landscape

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

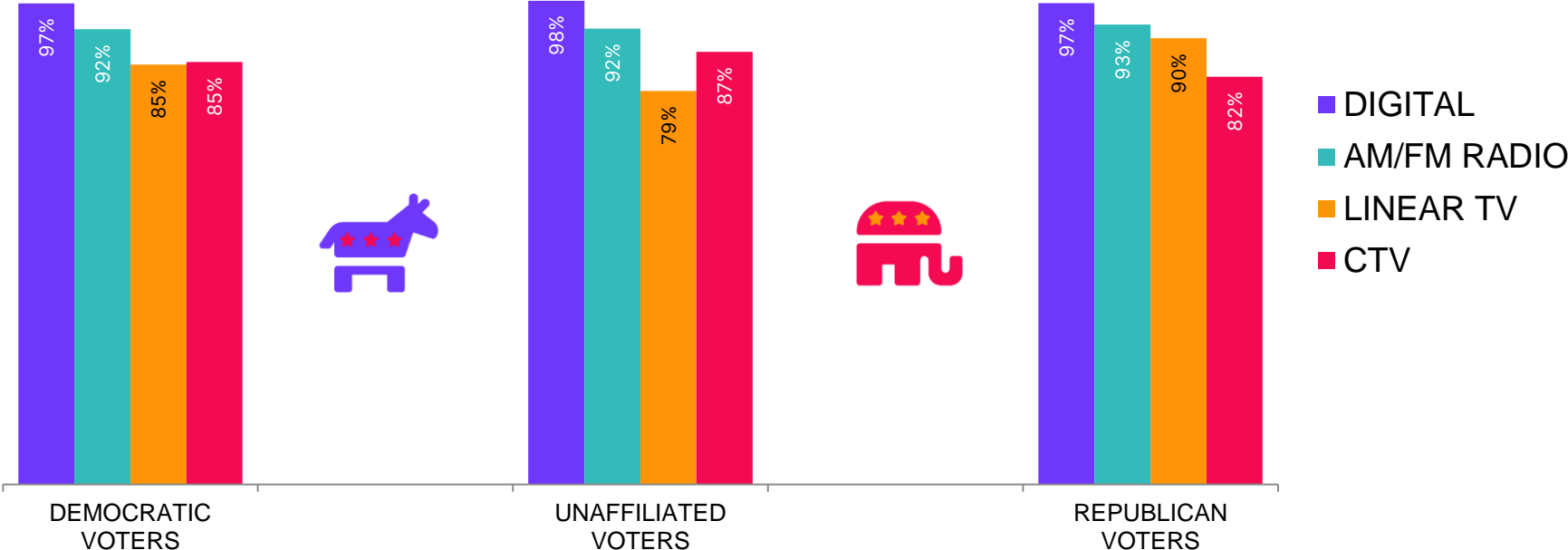


L2 VOTER DATA:
Actual voter behavior
is matched to Nielsen
panelists at the
individual level.
Media consumption
can now be viewed
by voter types

DIGITAL 	LINEAR TV 
AM/FM RADIO 	CONNECTED TV 

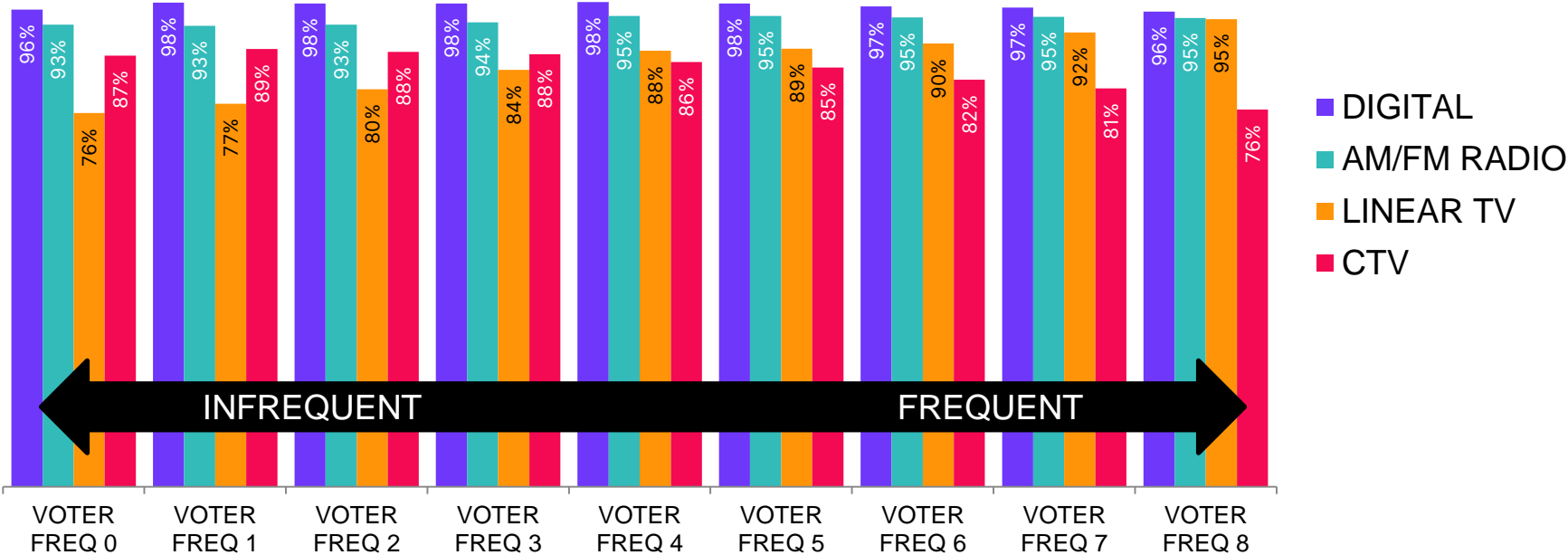
Source: Nielsen Media Impact, Linear TV = Broadcast and Cable TV, Connected TV = YouTube, Netflix, Hulu, Amazon Prime, etc with or without ads, AM/FM Radio does not include Spotify, Pandora, iTunes, etc., Digital = Search, Social, Open Web, etc.

AM/FM Radio and Digital Media Excel in Reaching Party Voters



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

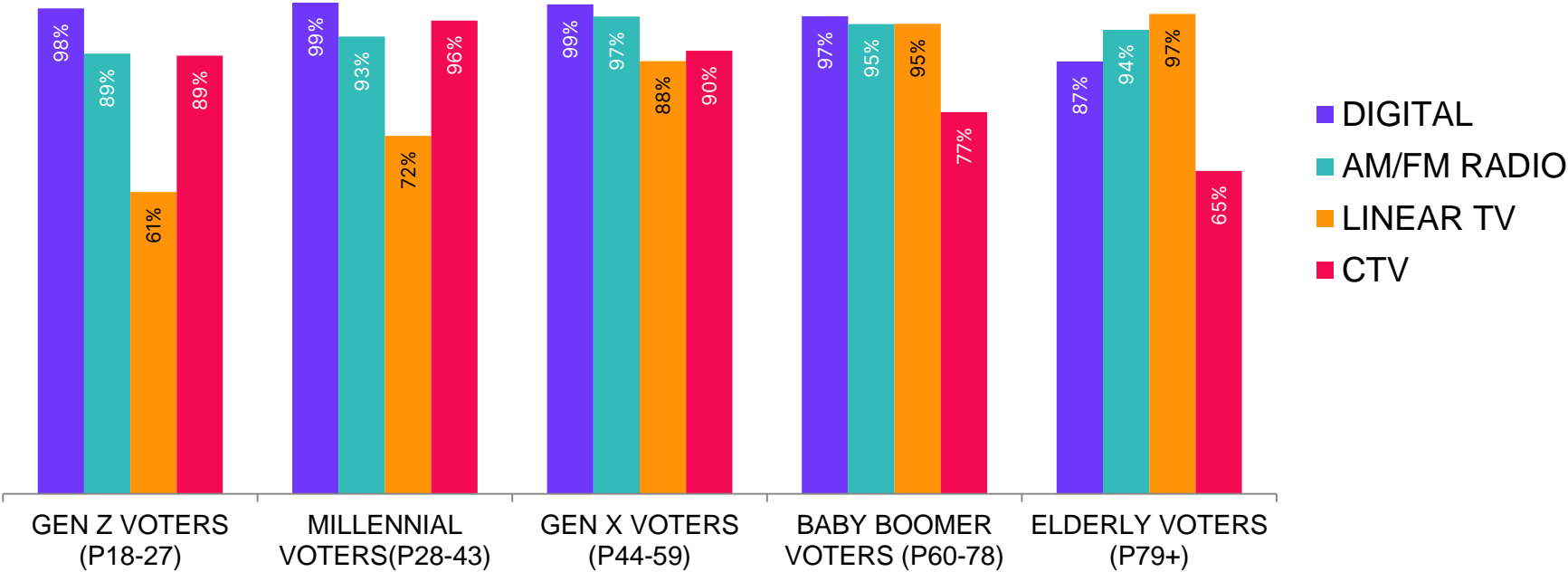
AM/FM Radio and Digital Media Excel in Reaching Voters of All Kinds



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

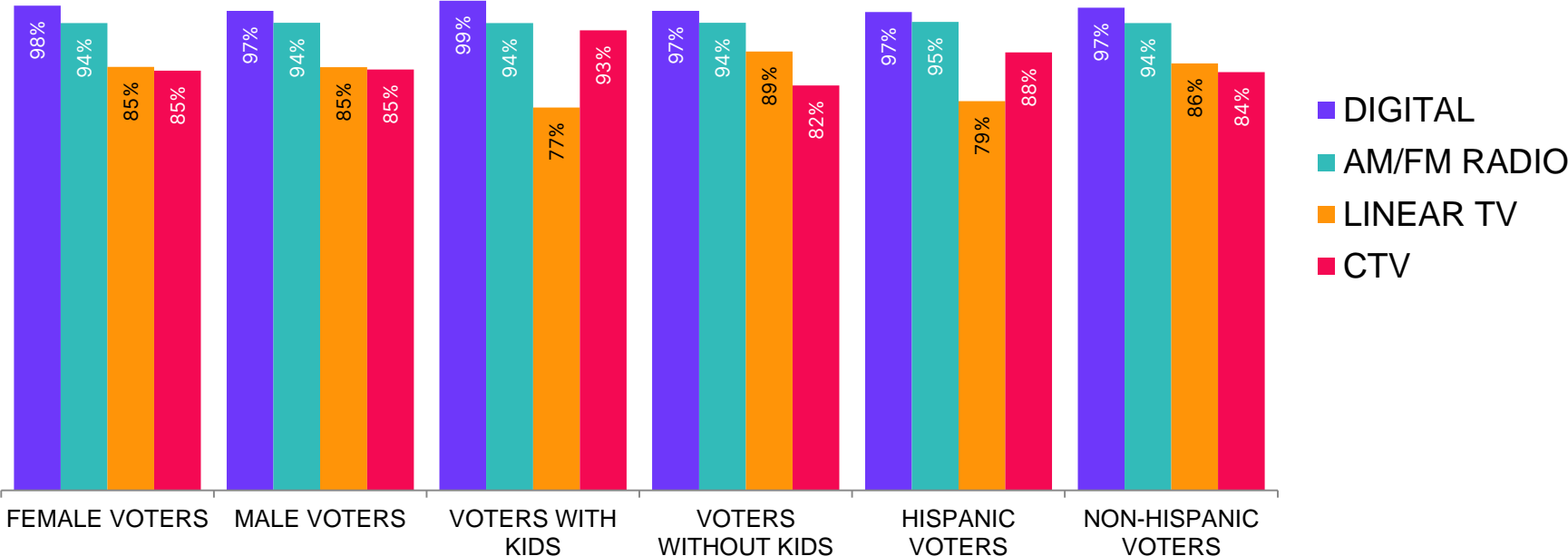
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AM/FM Radio and Digital Media Excel in Reaching Voters of All Ages



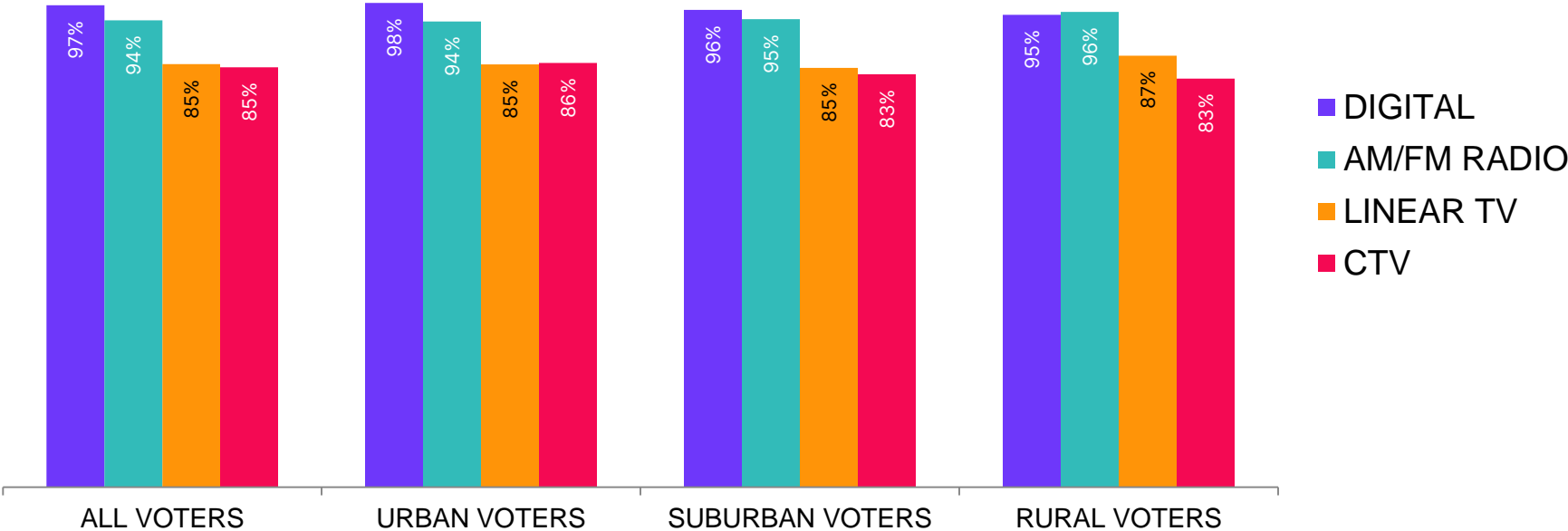
Source: Nielsen L2 Voter data, Sep 2023, Monthly Reach by media for voters by generational age segment

AM/FM Radio and Digital Media Excel 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

AM/FM Radio and Digital Media Excel in 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

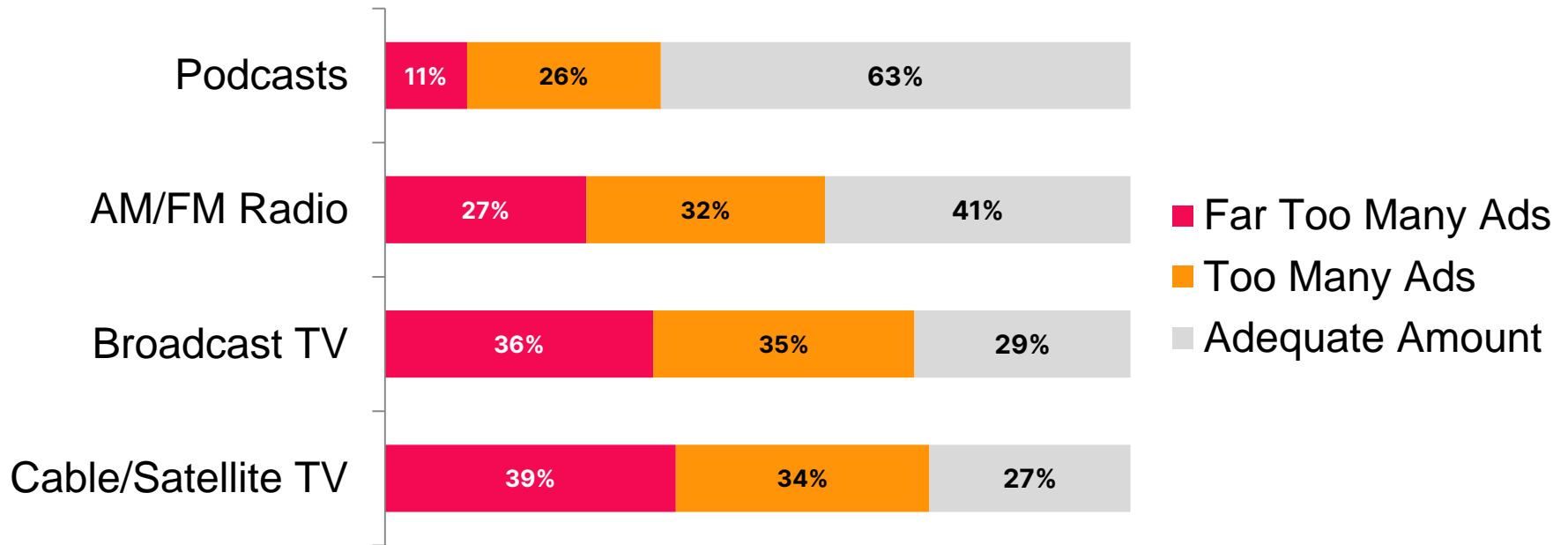
MAIN TOPICS

- 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

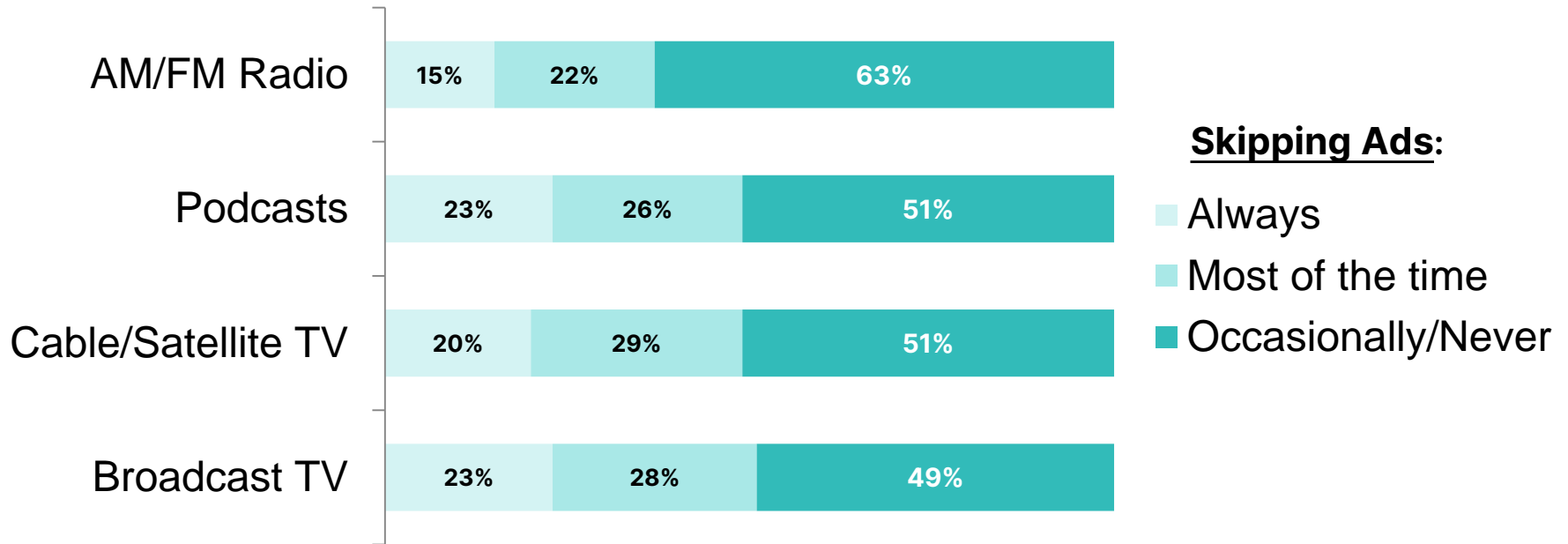
Advertising will perform better in a less crowded environment on AM/FM Radio and Podcasting



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



Leveraging Nielsen Media Impact

Professional grade media planning system used by all major ad agencies

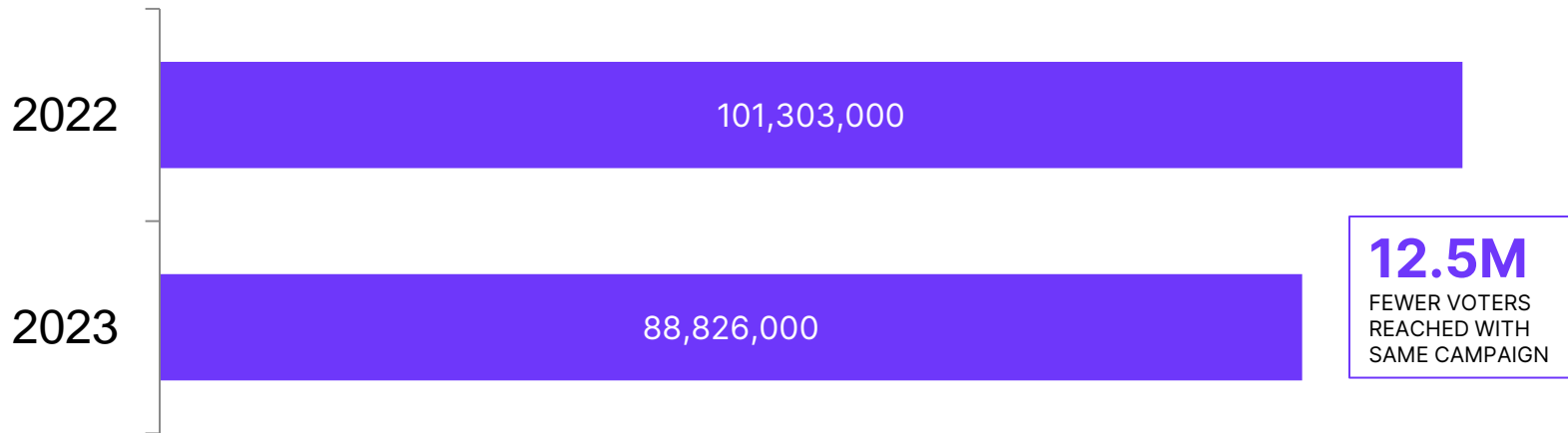
- Advanced media planning system built on **currency data** from TV, Radio, Digital, Print and more
- Leveraging fusion datasets to understand how different forms of **media work together** to achieve campaign goals
- Allows planners to **optimize a campaign** by a number of factors including budget,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

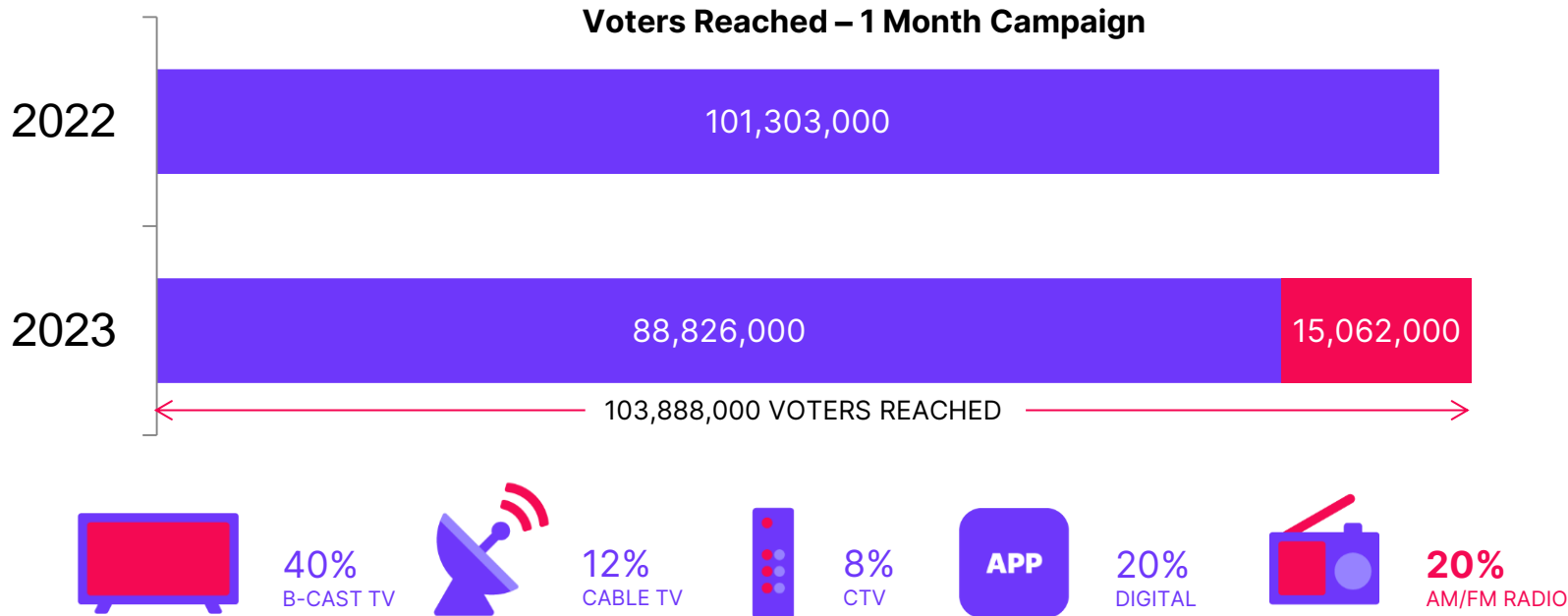
Voters Reached - 1 Month Campaign



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

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%

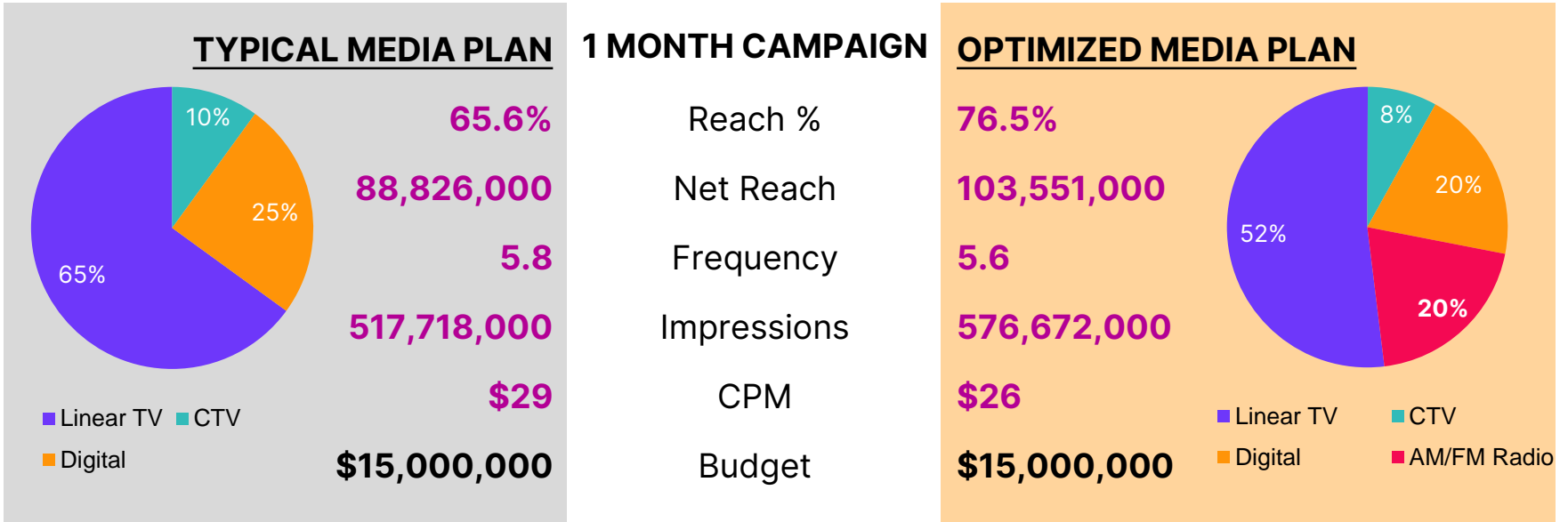
1 MONTH CAMPAIGN

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

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!

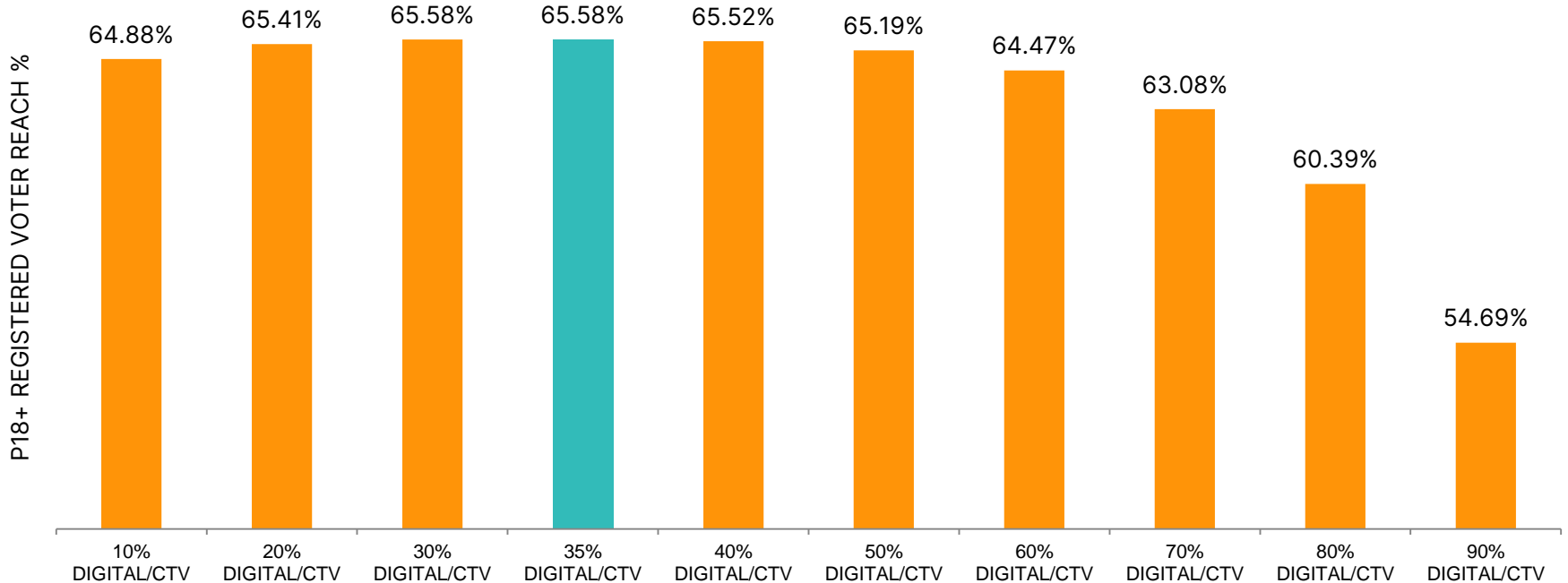
A 20% Allocation to Radio Reaches 15 Million More Voters (+17%) for No Additional Cost



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

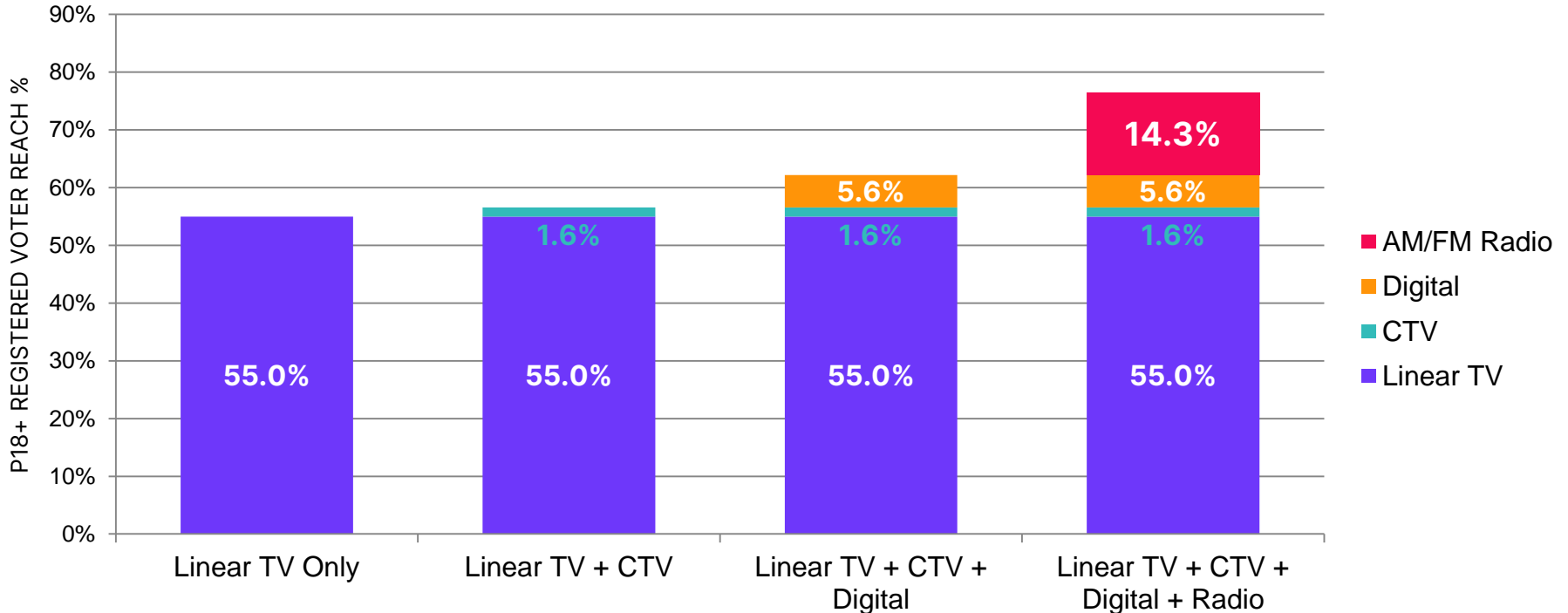
Shifting more budget to CTV & Digital media will reduce total campaign reach



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!

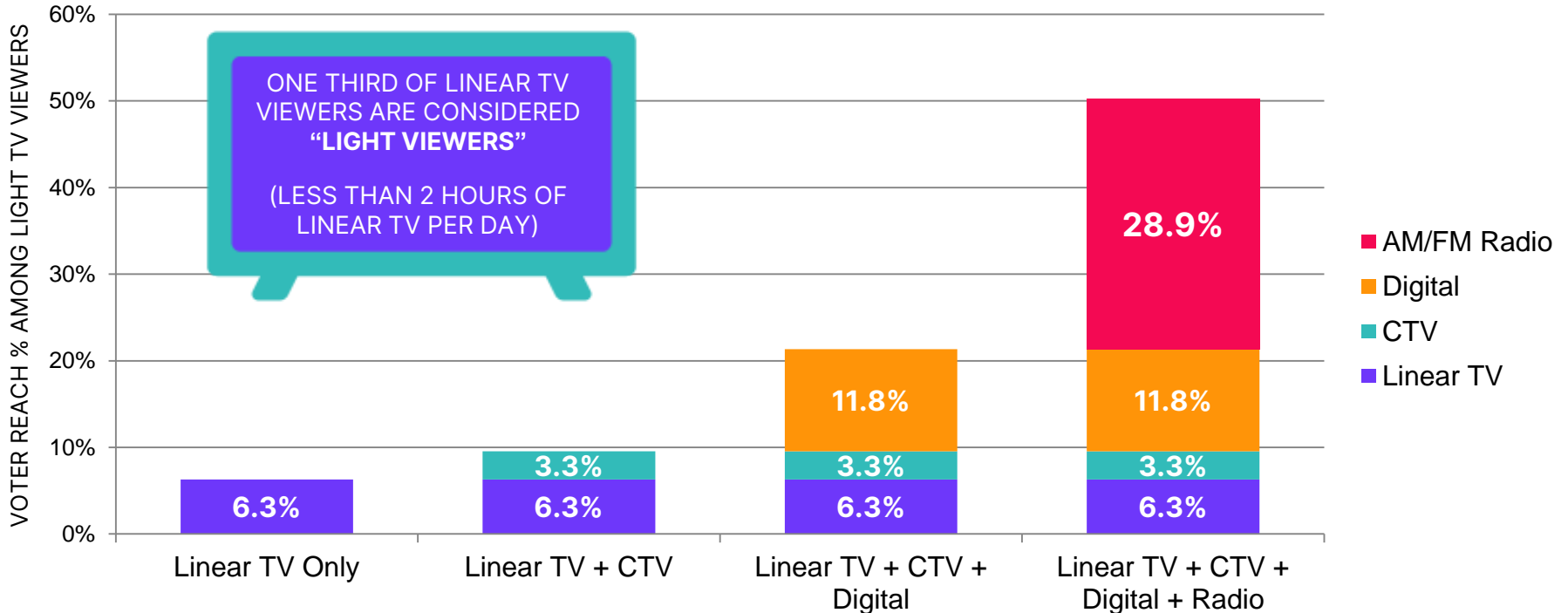
AM/FM Radio Boosts Campaign Reach

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!

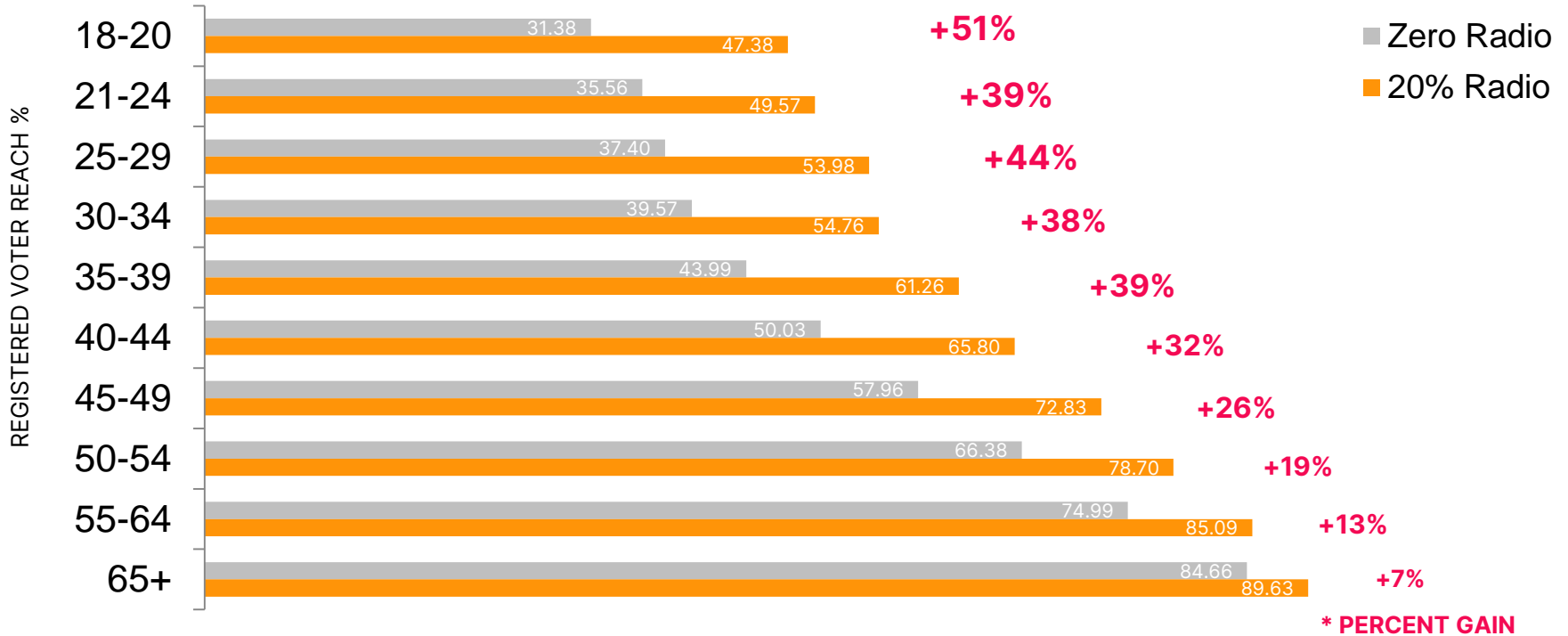
Among Light TV Viewers, AM/FM Radio Adds The Most Incremental Reach (not Digital or CTV)



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

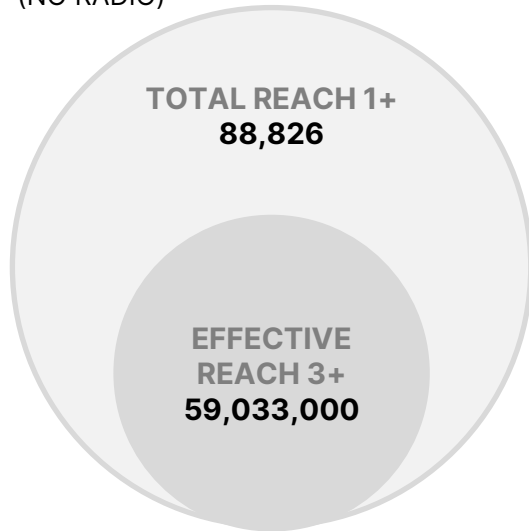


Source: Nielsen Media Impact, P18+ Registered Voters (Sept 2023 Fusion) CTV = Hulu, Netflix, Paramount+, Peacock, Pluto, Tubi, YouTube
Linear TV = Broadcast & Cable TV, Digital = Facebook, Instagram, Snapchat, Twitter, TikTok, AOL, Bing, Google, Yahoo!

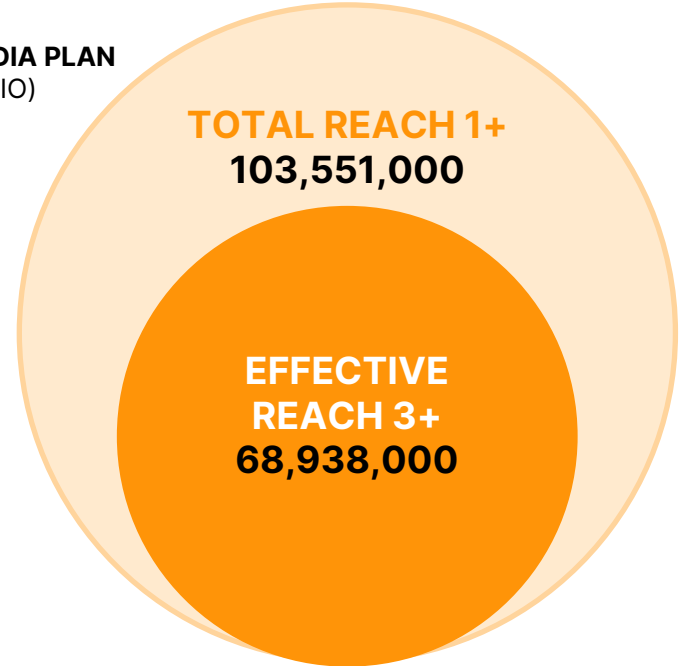
Radio Makes Your TV and Digital Buys Better

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%

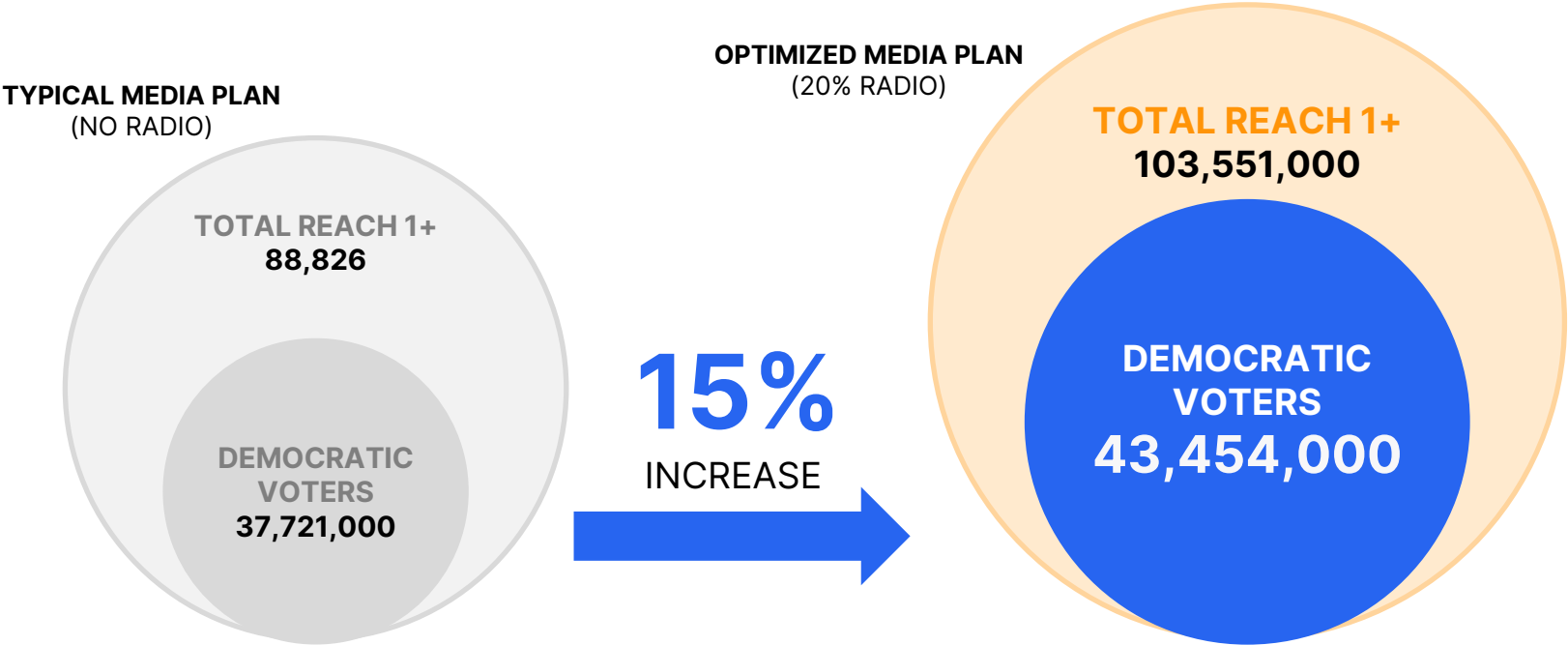
INCREASE



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

Radio Reaches 15% More Democratic Voters

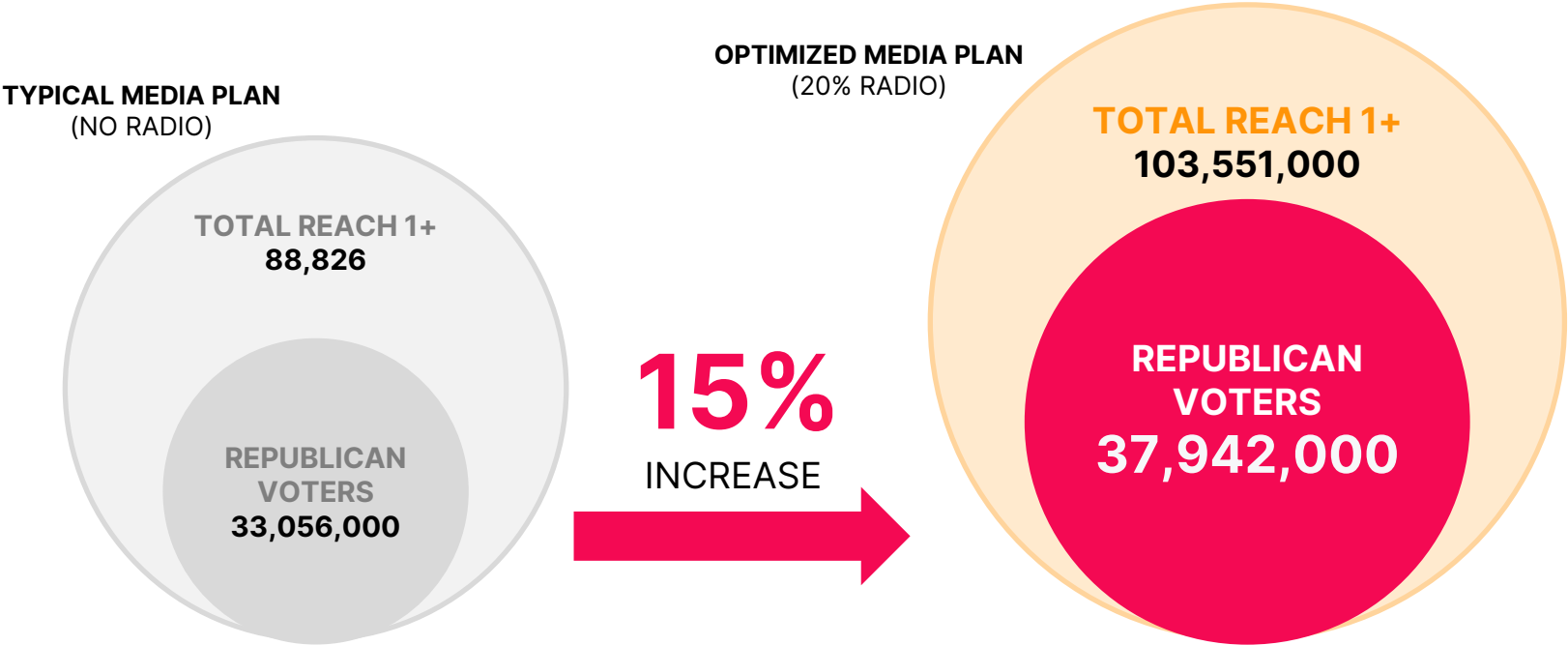
5.7 million more democratic voters reached by adding AM/FM Radio



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

Radio Reaches 15% More Republican Voters

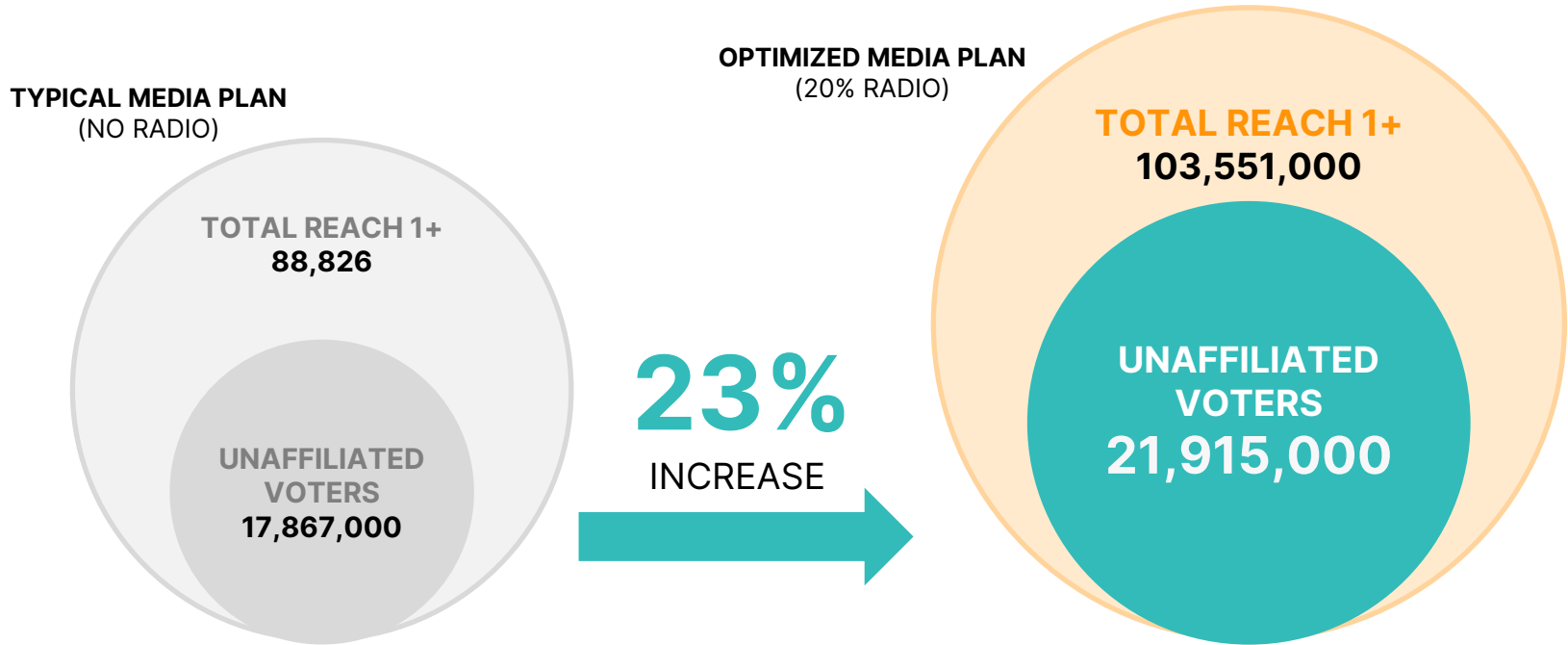
4.9 million more republican voters reached by adding AM/FM Radio



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

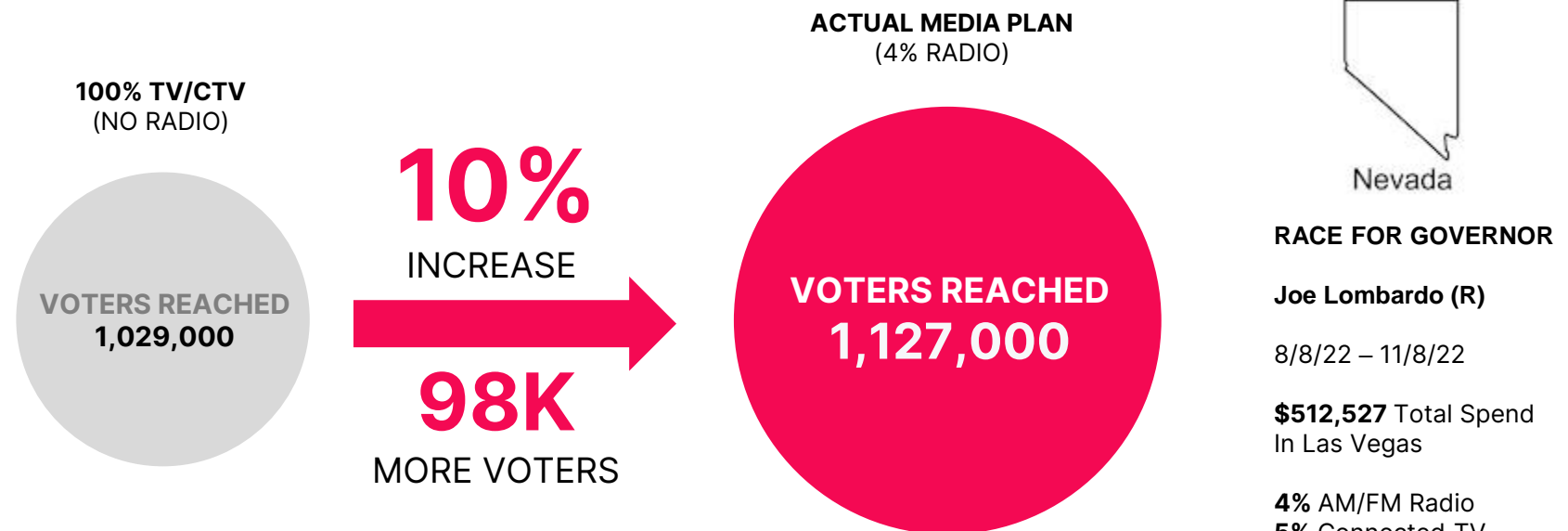
\$4,503,037 Total Spend
In Atlanta

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

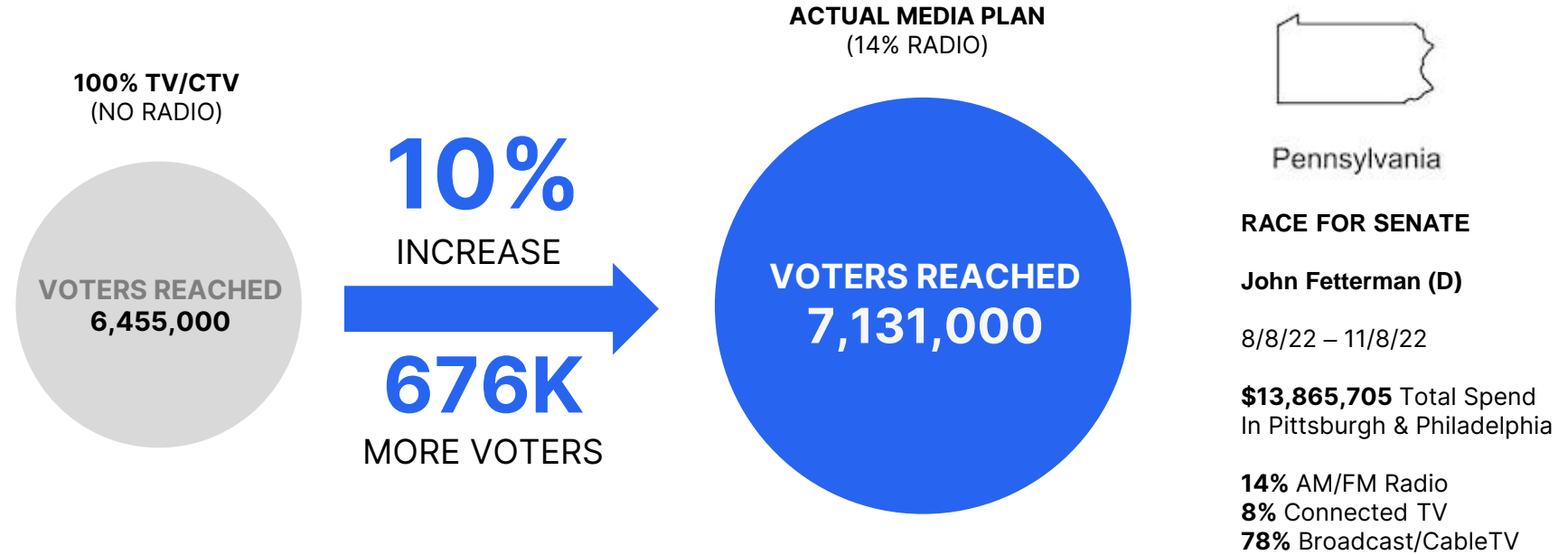


OUTCOME: Joe Lombardo defeats incumbent Steve Sisolak by **13,965** votes

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

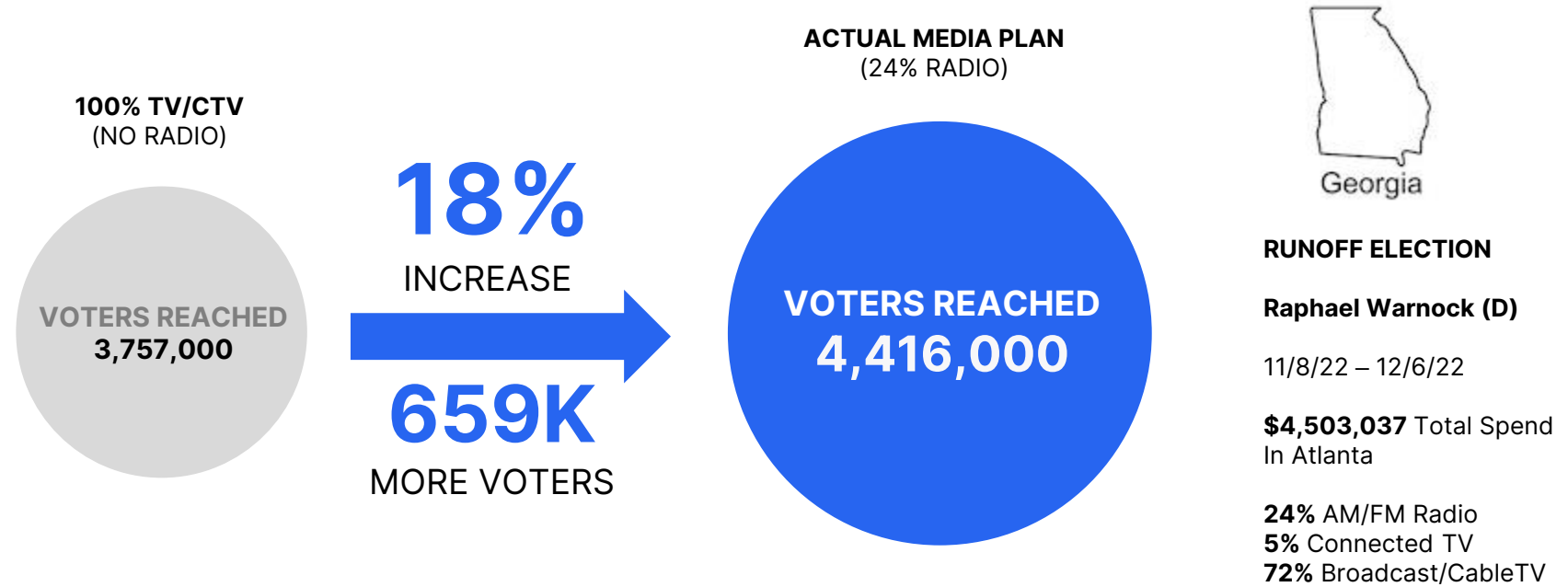


OUTCOME: John Fetterman defeats Mehmet Oz by 263,752 votes

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

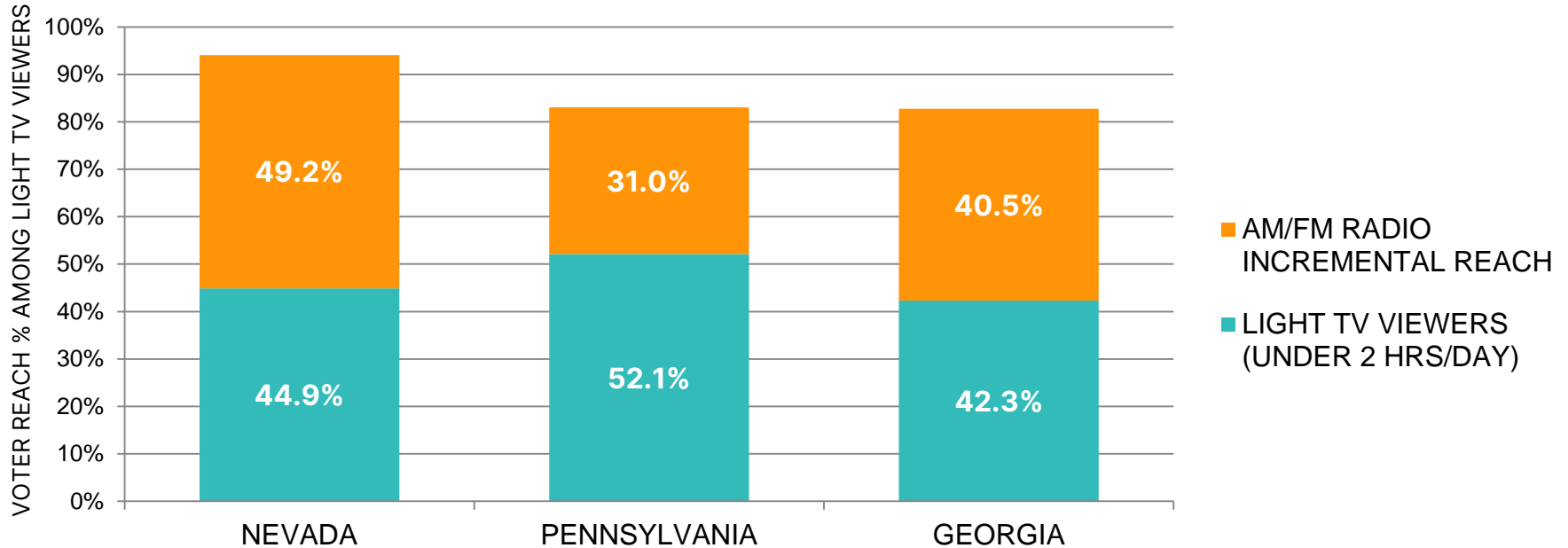


OUTCOME: Raphael Warnock defeats Herschel Walker by 96,613 votes

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



+



CTV

+



CABLE TV

+



B-CAST TV

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



13 WEEKS
87% REACH

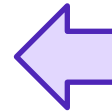
241,000 MORE VOTERS REACHED



ACTUAL

3 WEEKS
77% REACH

98,000 MORE VOTERS REACHED



1 WEEKS	0 WEEKS
71% REACH	70% REACH

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

