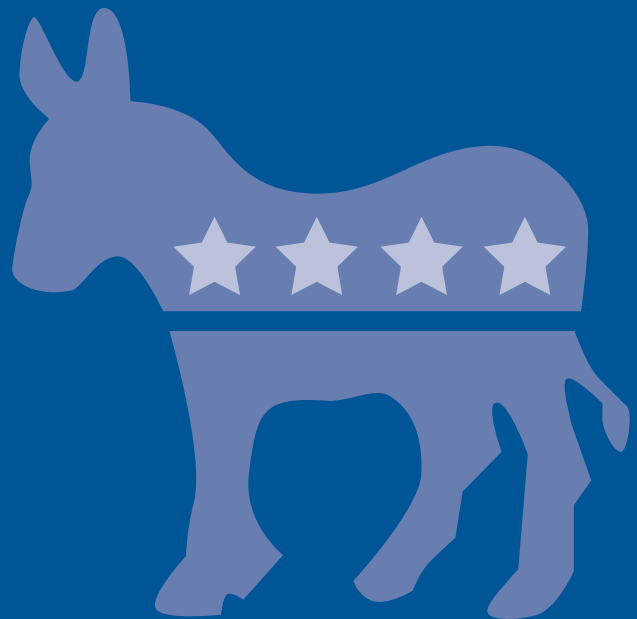
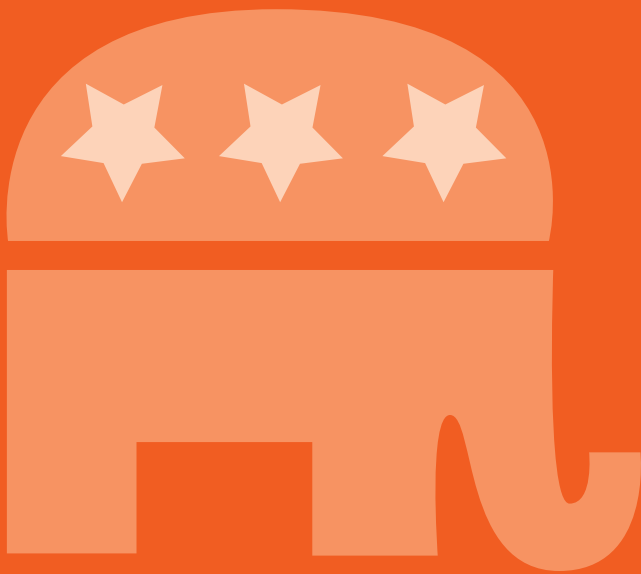


Nielsen
Examines
TV Viewers
to the Political
Conventions

September 2008



nielsen
.....



Nielsen Examines TV Viewers to the Political Conventions, September 2008

The 2008 presidential race has already proven itself an historic event with an African American candidate heading the Democratic presidential ticket and a woman running as Vice President on the Republican ticket. These historic circumstances seem to have had a strong influence on the record viewing of each party's national convention.

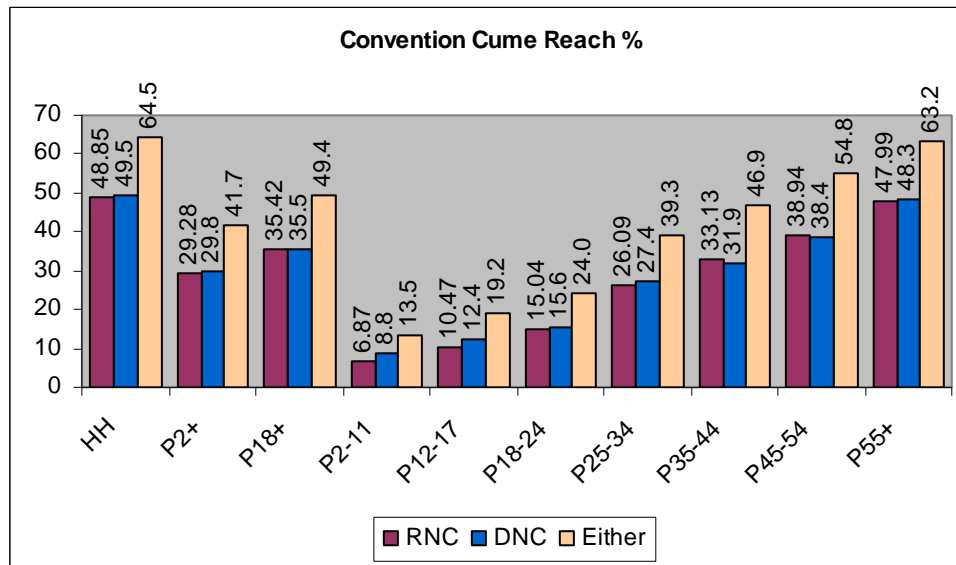
Nielsen's analysis looks at a cross section of television tuning to the Republican National Convention (RNC) and Democratic National Convention (DNC): who tuned to either convention or both, who tuned to one or more of the presidential and vice-presidential nomination acceptance speeches, and whether tuning was done more heavily on broadcast or cable nets. For a description of the methodology used in this analysis, see Appendix A. We focused on the final hour of coverage each evening on ad-supported broadcast and cable networks. Note that the Republican coverage was only three nights (Tuesday through Thursday) due to the effects of Hurricane Gustav.

Key Findings from The Nielsen Company:

- Nearly two thirds of all U.S. households (64.5% or 73.2 million homes) tuned into at least one of the 2008 political conventions (Graph 1). This equates to 120.1 million people ages 2+ watching a convention. Viewership levels for the two conventions were essentially tied, with about half of all households watching each one.
- 15.0% of all households tuned to just the RNC, and 15.7% tuned to just the DNC. Another 33.9% of all households tuned to both conventions.
- Homes that watched both conventions were more likely to be headed by someone 65 years or older. They also completed the most formal education: nearly one-third (32.3%) graduated from college. Those watching only one convention were fairly comparable on both education and HOH age, within a point or two.
- Homes that only tuned to the RNC were more likely to have higher incomes (\$100K+), to have a larger household size (4+), to be white, to own a DVR, and to have a head of household with higher education (4+ yrs college) and aged 35-54.
- Homes that only tuned in to the DNC were more likely to have a lower income (<20K), to have a smaller household size (2), to be African American, and to have a head of household who is younger (<35) and who has less education (1-3 Yrs College).
- About one-fifth (21.2%) of the DNC-only homes were headed by an African American. 83.5% of the RNC-only homes were headed by someone who is white.
- Over 70% of African American homes tuned to at least one of the conventions, including 35.7% that tuned into both, more than each of the other ethnic breaks. Meanwhile 27.4% tuned in only to the DNC and 8.1% tuned in only to the RNC.
- White homes had the second highest reach to both conventions (34.5%), and were the only ethnic break to have a higher percentage of partisan tuning to the RNC (16.2%) than the DNC (13.6%).

Convention Reach

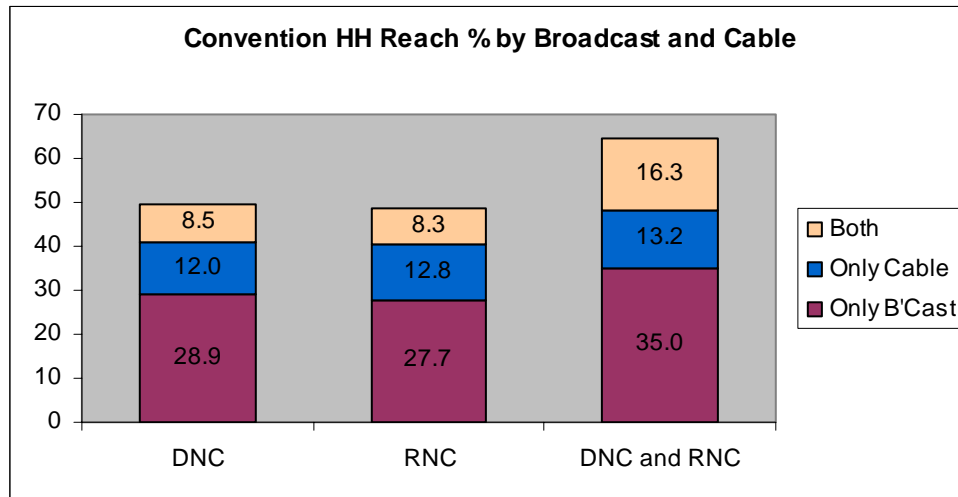
Graph 1



Nearly two thirds of all U.S. households (64.5%) tuned into at least one of the 2008 political conventions (Graph 1). This equates to 73.2 million homes and 120.1 million people ages 2+ watching either convention. Each convention alone had a reach of nearly 50% of U.S. households and the audience sizes were nearly identical for the DNC and RNC. The cumulative audiences showed a pattern typical for TV in general, where viewing increased concurrent with age. The youngest group of potential voters (18-24) had a substantially lower reach for either convention; 63.2% of persons 55+ watched at least one of the conventions, compared to just 24.0% of persons 18-24.

Cume percentages for the two conventions were very similar across all adult age breaks, which is notable given that the Republican gathering was shortened by one day due to Hurricane Gustav.

Graph 2



In Graph 2, the majority of viewers tuning to the final hour each night of both the DNC and RNC did so through one of the broadcast networks. For overall convention tuning, 35.0% of homes tuned only using broadcast networks, while 13.2% only used cable networks. Another 16.3% of U.S. homes watched both conventions and did so via both broadcast and cable network coverage.

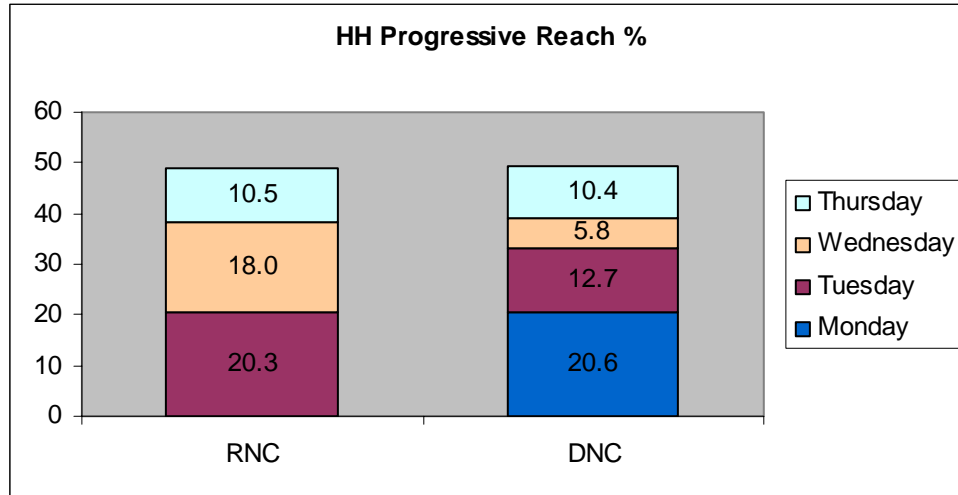
A comparable percentage of homes tuning to the DNC and RNC tuned only to broadcast networks (28.9% of DNC viewers, 27.7% of RNC viewers). Cable only viewers were also equally split among DNC and RNC viewers (12.0%, 12.8%).

Table 1

	Average Frequency		Average Minutes	
	RNC	DNC	RNC	DNC
HH	2.12	2.37	85.2	86.9
P2+	1.86	2.04	73.5	72.8
P18+	1.90	2.09	75.6	75.3
P2-11	1.25	1.39	40.1	42.1
P12-17	1.35	1.51	44.0	44.4
P18-24	1.42	1.56	49.4	49.9
P25-34	1.62	1.68	59.4	57.1
P35-44	1.72	1.79	63.7	61.7
P45-54	1.88	2.01	71.0	68.7
P55+	2.12	2.44	90.9	92.6

Table 1 details the number of nights and the total duration watched of each convention by a collection of age breaks. Even with an extra night of coverage, viewing—both frequency and duration—was fairly equal, with younger voters consistently tuning to fewer nights and minutes. Even with one less night (Monday) of RNC coverage, the two conventions tallied nearly identical viewing as measured by the average number of minutes.

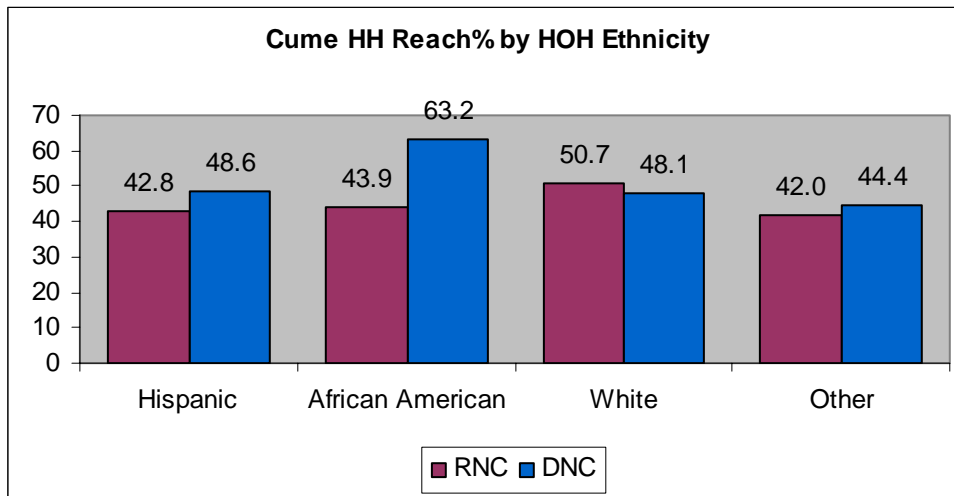
Graph 3



The incremental growth in reach for each convention can be seen in Graph 3. Due to Hurricane Gustav making landfall in Louisiana on Monday, September 1st, activities at the RNC were cut back and the day was not included in this report. For instance, 20.6% of all homes sampled opening night (Monday) of the DNC. Another 12.7% of different homes watched on Tuesday. Fewer new homes (5.8%) tuned Wednesday, the night of Joe Biden's speech, and another notable bump (10.4%) occurred on the final night, when Barack Obama addressed the convention. The RNC had a large jump in reach on Wednesday – likely attributable to Sarah Palin's address – that helped overall convention reach to nearly match that of the DNC. By the end of week, each convention pulled very similar cume ratings, 48.9% for the Republicans and 49.5% for the Democrats.

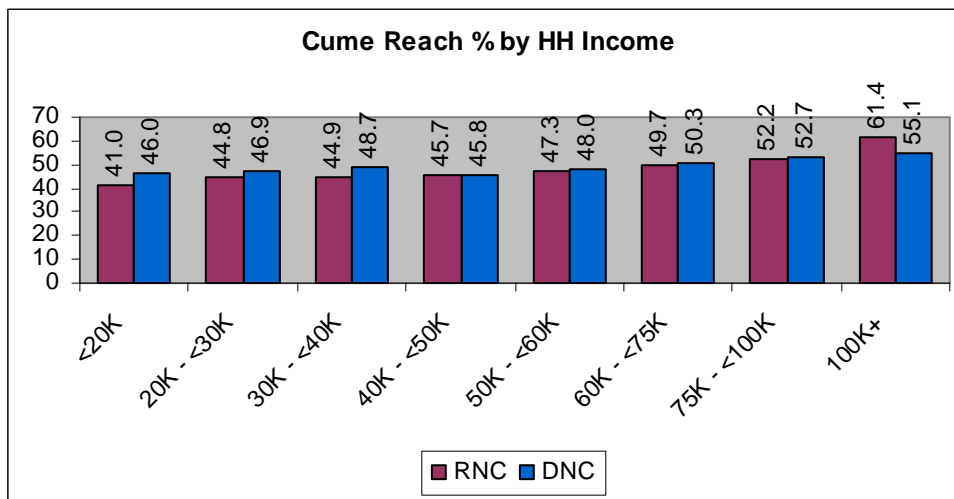
This next section analyzes the convention audiences by characteristics such as ethnicity and household income to reveal further differences.

Graph 4



The cumulative reach among African Americans was considerably higher for the DNC (63.2%) than for the RNC (43.9%). Reach within Hispanic and Other homes was slightly higher for the DNC than RNC, while the cumulative reach among White households was slightly higher for the RNC (50.7%) than DNC (48.1%).

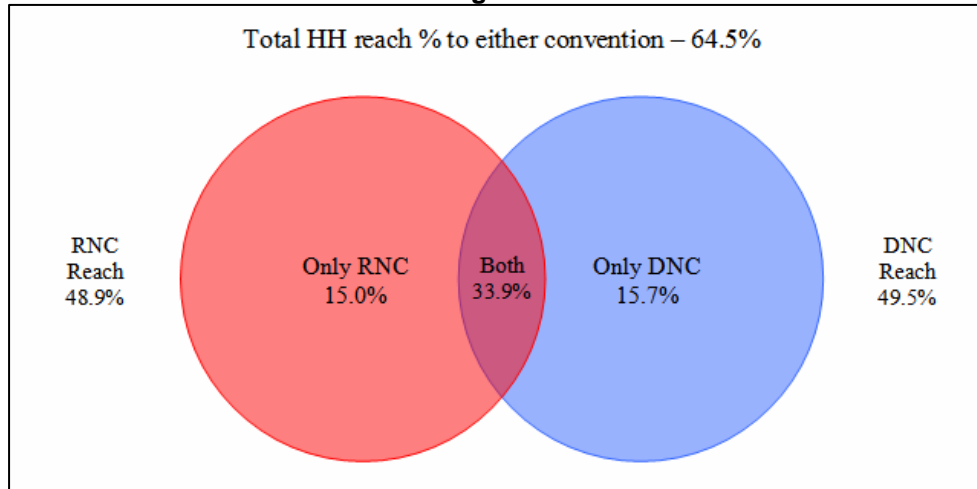
Graph 5



There are only a few notable differences in tuning to the conventions based on household income level. Homes with incomes of less than \$40K were slightly more likely to tune to the DNC, while homes with incomes of 100K+ were slightly more likely to tune to the RNC. There was little difference in tuning for those households with incomes of \$40K to \$100K. While not as the pattern where tuning correlated with age, there was a greater likelihood to watch either convention as HH income increased.

Only – Only – Both Reach

Figure 1



As previously stated, overall unduplicated household reach to either convention was 64.5%, meaning 35.5% of U.S. households did not tune to either convention. 48.9% of households tuned to the RNC, 49.5% of households tuned to the DNC, and 33.9% of households tuned to both. Figure 1 illustrates that 15.0% of households tuned to just the RNC, and 15.7% tuned to just the DNC. For the sake of this analysis, one could assume that homes which only tuned to one convention identify themselves with that particular party.

Table 2

Table 2 profiles homes that watched only one or both conventions. It shows the distribution of tuning homes within categories such as county size, household income and household size. For instance:

- Homes that only tuned to the RNC were more likely to have higher incomes (\$100K+), to have a larger household size (4+), to be white, to own a DVR, and to have a head of household with higher education (4+ yrs college) and aged 35-54.
- Homes that only tuned in to the DNC were more likely to have a lower income (<20K), to have a smaller household size (2), to be African American, and to have a head of household who is younger (<35) and who has less education (1-3 Yrs College).
- In terms of household size, of the homes that watched only the Democratic convention coverage, 27% have one person in the home, compared to 21.5% of the RNC-only audience. Homes tuning only to the RNC were more likely to have four or more persons than the DNC-only audience (28.6% vs. 23.4%).
- About one-fifth (21.2%) of the DNC-only homes were headed by an African American. 83.5% of the RNC-only homes were headed by someone who is white. Homes that watched both show a pattern that is more closely aligned with the population.
- Homes that watched both conventions were more likely to be headed by someone 65 years or older. They also completed the most formal education: nearly one-third (32.3%) graduated from college. Those watching only one convention were fairly comparable on both education and HOH age, within a point or two.

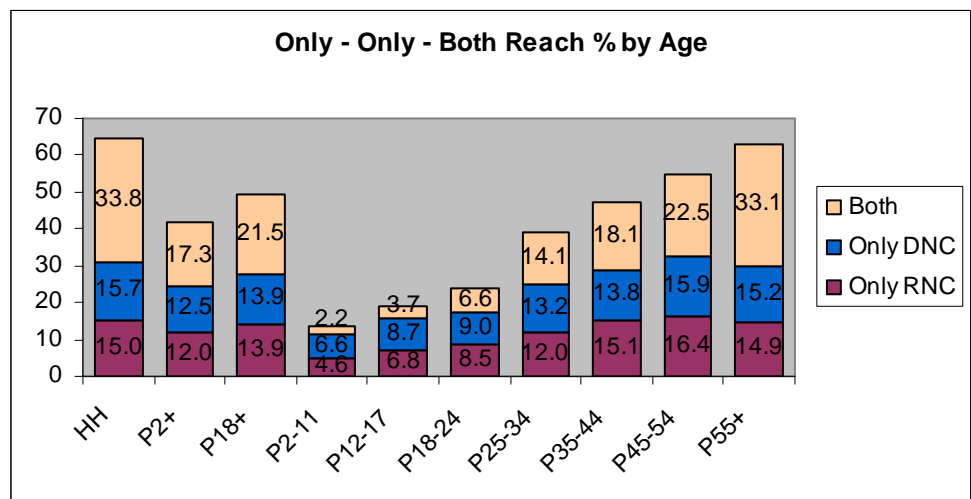
	RNC Only	DNC Only	Both
County Size A	38.1%	41.7%	41.4%
County Size B	32.3%	31.9%	30.8%
County Size C	15.3%	14.1%	14.0%
County Size D	14.3%	12.4%	13.8%
HH Income <20K	15.6%	21.1%	16.9%
HH Income 20K - <30K	9.8%	10.9%	10.9%
HH Income 30K - <40K	9.7%	11.9%	9.7%
HH Income 40K - <50K	9.9%	9.5%	8.4%
HH Income 50K - <60K	8.2%	8.2%	7.6%
HH Income 60K - <75K	11.3%	11.2%	9.8%
HH Income 75K - <100K	12.0%	11.9%	12.4%
HH Income 100K+	22.9%	14.3%	24.8%
HH Size 1	21.5%	27.0%	23.9%
HH Size 2	31.9%	32.1%	35.3%
HH Size 3	18.1%	17.7%	16.6%
HH Size 4+	28.6%	23.4%	24.3%
HOH ED 1-3 Yrs HS	6.4%	9.1%	7.2%
HOH ED 4 Yrs HS/Grad	30.4%	30.2%	28.0%
HOH ED 1-3 Yrs College	27.4%	28.5%	26.7%
HOH ED 4+ Yrs College	31.0%	26.5%	32.3%
HOH African American	6.6%	21.2%	12.8%
HOH Other	10.1%	11.3%	8.7%
HOH White	83.5%	67.1%	78.7%
HOH Hispanic	10.2%	13.7%	9.3%
Territory - East Central	12.8%	12.2%	12.3%
Territory - Northeast	19.3%	20.7%	20.4%
Territory - Pacific	18.9%	17.7%	17.9%
Territory - Southeast	20.1%	22.7%	20.5%
Territory - Southwest	13.3%	10.5%	12.0%
Territory - West Central	15.6%	16.2%	16.8%
DVR Household	28.2%	22.6%	25.0%
HOH Age < 35	19.9%	21.5%	13.0%
HOH Age 35-44	21.7%	18.6%	16.8%
HOH Age 45-54	22.8%	22.3%	20.9%
HOH Age 55-64	16.8%	17.1%	19.8%
HOH Age 65+	18.8%	20.4%	29.5%

The previous section analyzed the composition of the homes which tuned to one or both conventions. These next charts expand that analysis, looking at the actual viewing percentages (not just the distribution) within each characteristic.

The extent to which a person or household is likely to tune to one convention or the other, or both conventions, varies directly with age, household income, and head of household education level. In terms of “partisan tuning” (tuning to only one convention or the other), there was little difference for the various age groups. Partisan tuning across income and education groups was slightly more varied: homes with incomes of less than \$40K were more likely to tune only to the DNC, while homes with incomes of \$100K+ were more likely to only tune to the RNC; also, homes whose head of household only had one to three years of high school were more likely to only tune to the DNC, while homes whose head of household had 4+ years of college were more likely to tune only to the RNC.

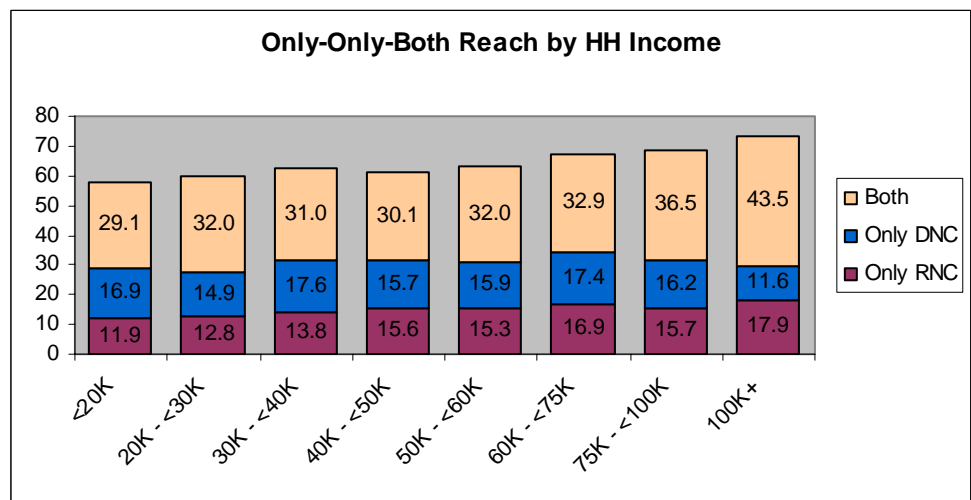
Graph 6

Not only were persons 55+ the most likely to do any convention tuning (63.2%), but they were also the most likely to tune to both conventions (33.1%).



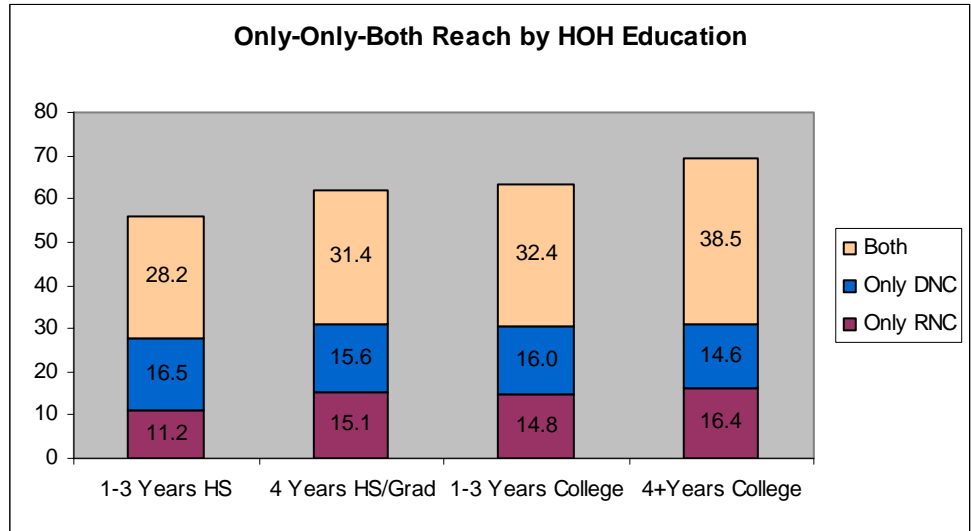
Graph 7

Similarly, homes with an income of \$100K+ were the most likely to do any convention tuning (73.0%) or tuning to both conventions (43.5%), while homes with incomes of <\$20K did the least of both.



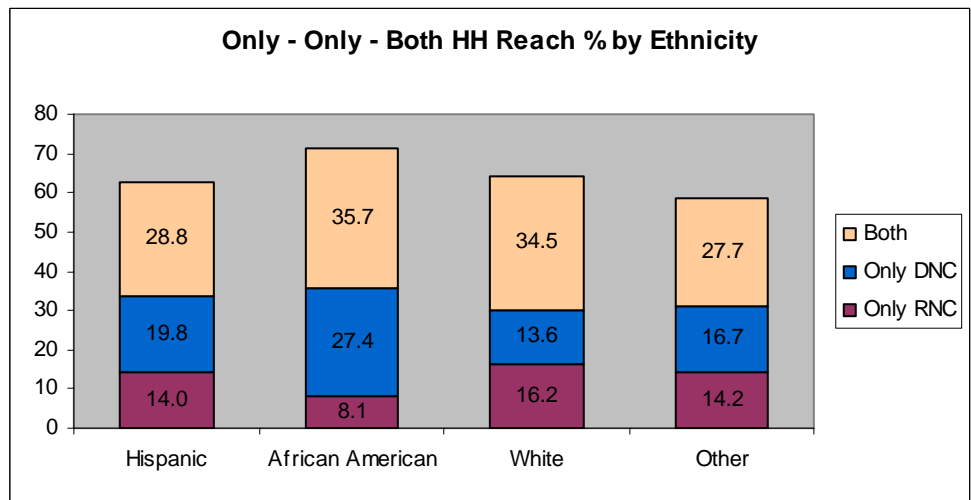
Graph 8

Education levels skewed similarly, meaning that higher education aligned with more convention tuning overall.



Graph 9

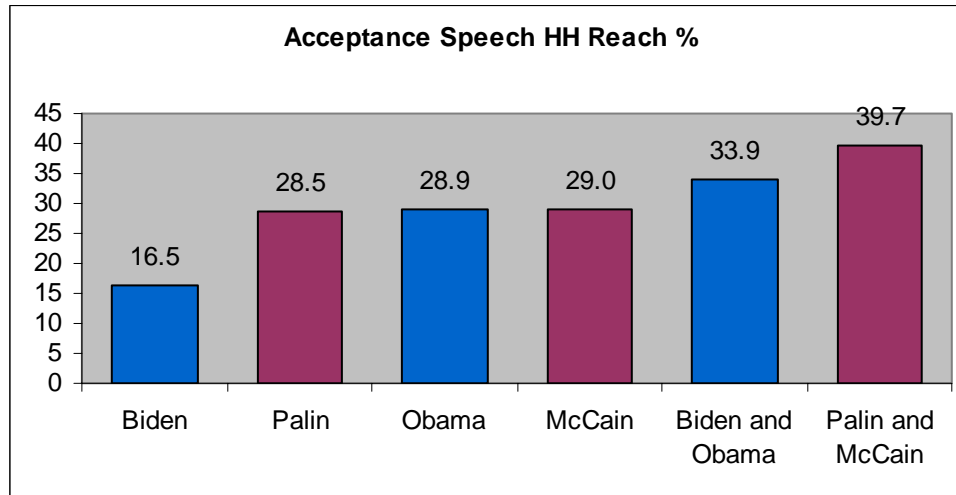
Over 70% of African American homes tuned to at least one of the conventions, including 35.7% that tuned into both, more than each of the other ethnic breaks. Meanwhile 27.4% only tuned in to the DNC. White homes had the second highest reach to both conventions (34.5%), and were the only ethnic break to have a higher percentage of partisan tuning to the RNC (16.2%) than the DNC (13.6%).



Nomination Acceptance Speeches

The following section looks specifically at the acceptance speeches given by each presidential and vice presidential nominees.

Graph 10



John McCain's and Barack Obama's acceptance speeches reached almost identical sized audiences, 29.0% and 28.9% respectively, of all homes. Meanwhile, Sarah Palin's address was seen in 28.5% of U.S. homes and far outreached Joe Biden's (16.5%). It is interesting to note that the variations in reach correspond to the speech durations (Table 4). Biden's speech was approximately 23 minutes long while Palin's lasted approximately 39 minutes. This may explain part of the disparity between Biden's and Palin's audience. Lastly, the pair of Republican speeches outdrew the Democrats, 39.7% (unduplicated) to 33.9%.

In all four cases, reach increased with age.

In terms of gender we found relatively equal male/female splits with the exception of 25-34s and 55+, where women were somewhat more likely to watch Obama and Palin.

Among voting-age females, Palin's speech (20.5%) virtually tied Obama's (20.4%), and for voting-age males McCain's speech (19.7%) had a higher reach than Palin (18.4%) and Obama (18.0%), perhaps because his address followed immediately after the season's first pro football game.

Palin's speech did draw more females than McCain's across most age breaks, and drew more females (31.0%) and males (29.6%) than all other speeches in the P55+ breaks. In breaks for females 44 and under, Obama had a higher reach. McCain had a slightly higher reach than Obama across most male breaks, and McCain and Palin had higher reaches across breaks for persons 45+.

Table 3

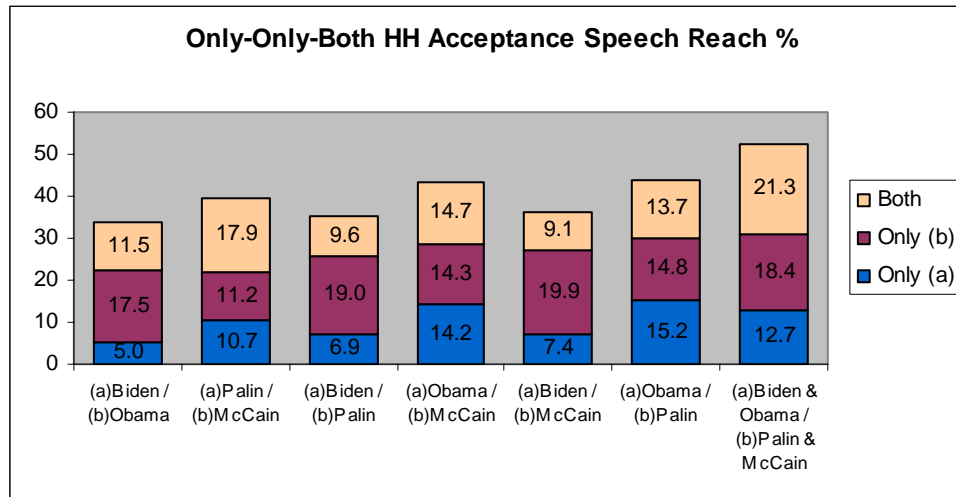
Reach %				
	Biden	Obama	Palin	McCain
HH	16.5	28.9	28.5	29.0
F2+	9.2	17.0	16.5	16.2
M2+	7.7	15.1	14.7	16.1
F18+	11.4	20.4	20.5	19.8
M18+	9.6	18.0	18.4	19.7
F12-17	1.4	5.2	2.5	3.6
M12-17	1.6	7.7	3.4	6.0
F18-24	3.0	7.9	6.7	6.1
M18-24	2.1	7.4	5.3	7.6
F25-34	6.0	16.2	13.4	12.9
M25-34	6.0	13.7	10.7	13.8
F35-44	7.4	17.4	16.3	15.7
M35-44	7.1	16.9	15.5	16.9
F45-54	11.5	19.3	21.3	21.8
M45-54	10.2	19.2	20.0	21.6
F55+	19.4	29.4	31.0	29.4
M55+	16.4	25.4	29.6	29.4

Table 4

Average Minutes				
	Biden	Obama	Palin	McCain
Speech Length	23min	45min	39min	49min
HH	20.8	37.8	32.5	39.7
P2+	20.3	35.7	31.0	37.5
P18+	20.3	36.2	31.2	37.8
P2-11	19.9	29.0	25.2	31.5
P12-17	19.3	31.2	28.2	32.1
P18-24	19.9	33.8	28.9	34.5
P25-34	20.4	33.9	29.5	34.8
P35-44	19.7	35.3	30.0	37.4
P45-54	20.4	35.1	31.0	35.5
P55+	20.5	37.8	32.2	39.9

Unlike overall tuning to the conventions, the length of time watching each of the four acceptance speeches did not vary much by age, at least not among voting-age viewers. McCain's address was the longest (49 mins) and netted slightly more tuning on a total household basis (39.7 mins, or 81% of the duration). Barack Obama's 45-minute speech averaged 37.8 minutes, or 84% of its total. Sarah Palin's speech averaged 32.5 minutes of tuning (83%), while Joe Biden's 20.8 minute average netted the highest percentage of minutes (90%) of all four addresses.

Graph 11



Over one-half of all U.S. homes (52.4%) tuned in to at least one of the four speeches, including 21.3% of homes that tuned in to all of them. Looking at viewing to multiple speeches:

- 34% of U.S. homes overall tuned to Biden and Obama combined, including 17.5% that only tuned to Obama's speech and 11.5% that tuned to both speeches.
- 39.8% of U.S. homes tuned to Palin and McCain, including 11.2% that only tuned to McCain's speech and 17.9% that tuned to both speeches.
- Among those that tuned to Biden and Palin's speeches, 6.9% only tuned to Biden's speech and 19.0% only tuned to Palin's speech.
- A total of 43.2% of U.S. households tuned to Obama's and McCain's speeches. The percentage of those who tuned only to Obama (14.2%) was comparable to those who only tuned to McCain (14.3%). The proportion who tuned to both was equally as large, 14.7%.

Conclusion

The close Presidential race will continue to draw viewers to the upcoming series of debates among the four candidates and The Nielsen Company will provide analyses of their audiences. In addition, we will track those viewers who watched the conventions and see whether they tune to any of the debates.

###

Appendix A Specifications of Networks and Durations Included in This Analysis

- 6 minute “cume qualifier,” meaning a home or person had to watch a minimum of six non-continuous minutes to qualify as a viewer
- Based on “Live + Same Day” rating, meaning DVR playback was included if done on the same night
- 75% Unification: 8/25/08 – 9/7/08, meaning homes had to be installed and providing usable tuning data for 75% of the convention days.

Democratic Convention

- Viewing Sources:
 - o ABC
 - o CBS
 - o NBC
 - o Telemundo (Thursday Only)
 - o Univision (Thursday Only)
 - o CNN
 - o FNC
 - o MSNBC
 - o BET
 - o TV1
- Dates/Times used:
 - o Monday, 8/25/08 – 10:00p – 11:00p
 - o Tuesday, 8/26/08 – 10:00p – 11:10p
 - o Wednesday, 8/27/08 – 10:00p – 11:00p
 - o Thursday, 8/28/08 – 10:00p – 11:02p

Republican Convention

- Viewing Sources:
 - o ABC
 - o CBS
 - o NBC
 - o Telemundo (Thursday Only)
 - o Univision (Thursday Only)
 - o CNN
 - o FNC
 - o MSNBC
- Dates/Times used:
 - o Tuesday, 9/2/08 – 10:00p – 11:00p
 - o Wednesday, 9/3/08 – 10:00p – 11:17p
 - o Thursday, 9/4/08 – 10:00p – 11:11p (NBC, 10:01p – 11:11p)

Individual Speech Dates/Times used:

- Biden – Wednesday, 8/27/08 – 10:31p – 10:54p
- Obama – Thursday, 8/28/08 – 10:11p – 10:56p
- Palin – Wednesday, 9/3/08 – 10:29p – 11:08p
- McCain – Thursday, 9/4/08 – 10:15p – 11:04p