



2010 MIDTERM CAMPAIGN MEDIA ANALYSIS **Week of October 4, 2010**

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**MEDIA ANALYSIS
CALIFORNIA GOVERNOR'S RACE
Jerry Brown (D) vs Meg Whitman (R)
Week of October 4, 2010**

Summary

Republican Meg Whitman continued her big advertising lead over Democrat Jerry Brown in the California gubernatorial campaign last week. As the campaign enters its final stretch, one misstep overtook another to shift both the on-air and online conversation.

TV Advertising

Both campaigns dramatically increased their advertising presence last week. Brown increased his number of ads almost 60% over last week, but Whitman's 51% increase contributed to another big lead in total ads across each of California's four major markets.

TV Advertising Activity, 10/4 to 10/10/10

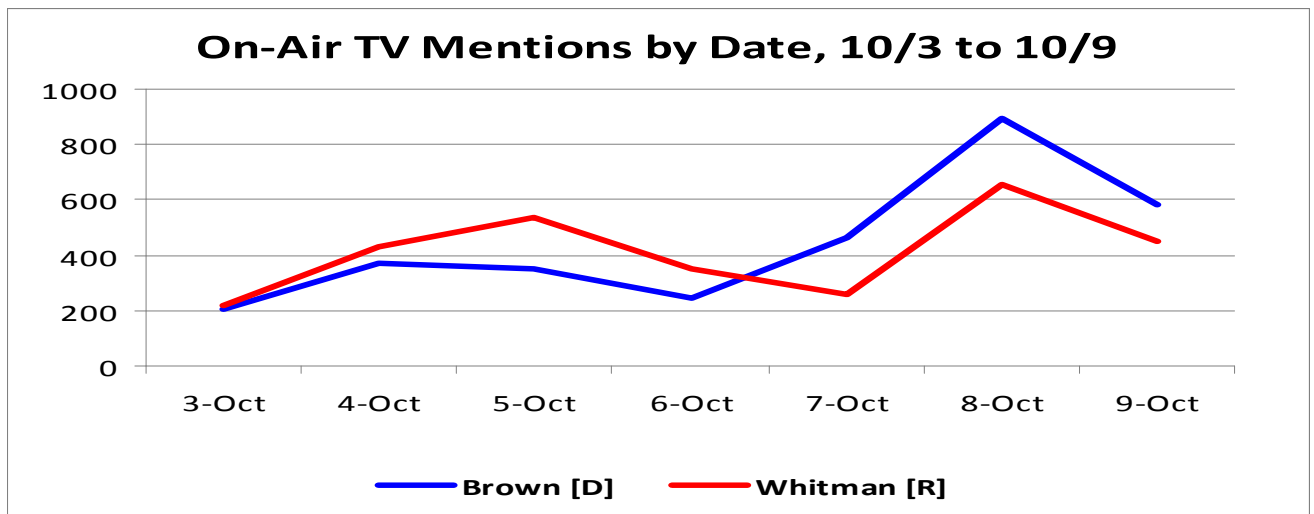
	Los Angeles DMA	Sacramento DMA	San Diego DMA	San Francisco DMA	TOTAL
Brown	1034	624	476	670	2804
Whitman	1140	877	670	1040	3727

Source: The Nielsen Company 2010

Note: Totals based on ads appearing in the Los Angeles, Sacramento, San Diego, and San Francisco DMAs

TV Presence

In an analysis of total TV exposure, including paid and free media mentions, Brown surpassed Whitman for the latter half of last week. The bounce, however, is partly due to coverage of a voicemail recording where Brown spoke disparagingly about Whitman.

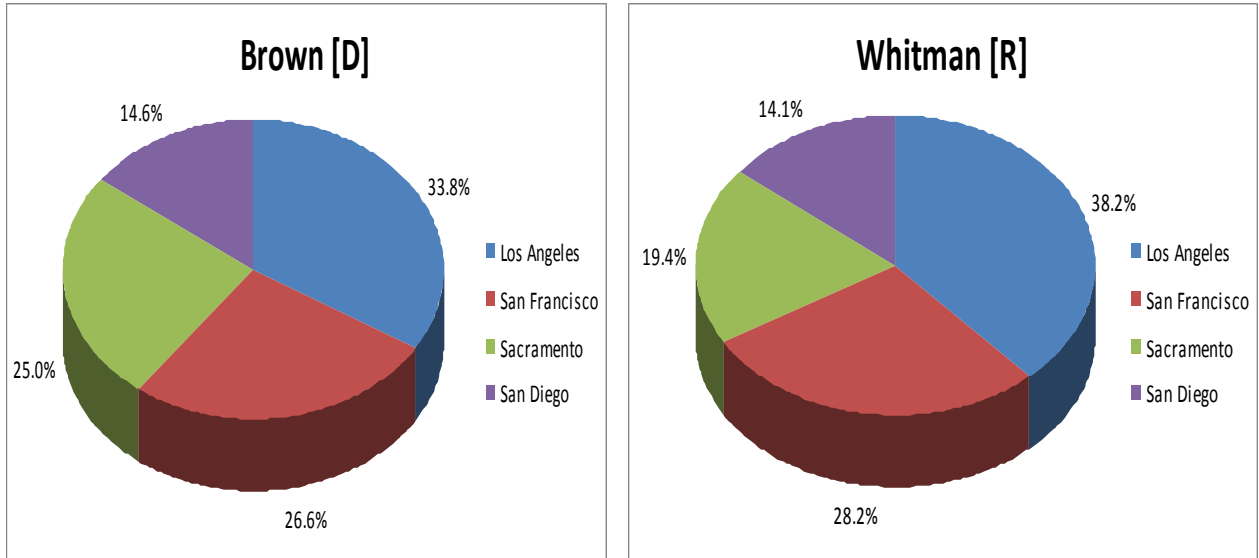


Source: The Nielsen Company 2010

Note: Totals based on all closed-captioned mentions of candidate names airing on 31 stations across California's top four DMAs

A market-by-market analysis of total on-air mentions shows that Whitman received slightly more exposure in Los Angeles last week, while Brown received a larger share from the Sacramento DMA.

TOTAL ON-AIR MENTIONS, BY MARKET
October 3 to October 9

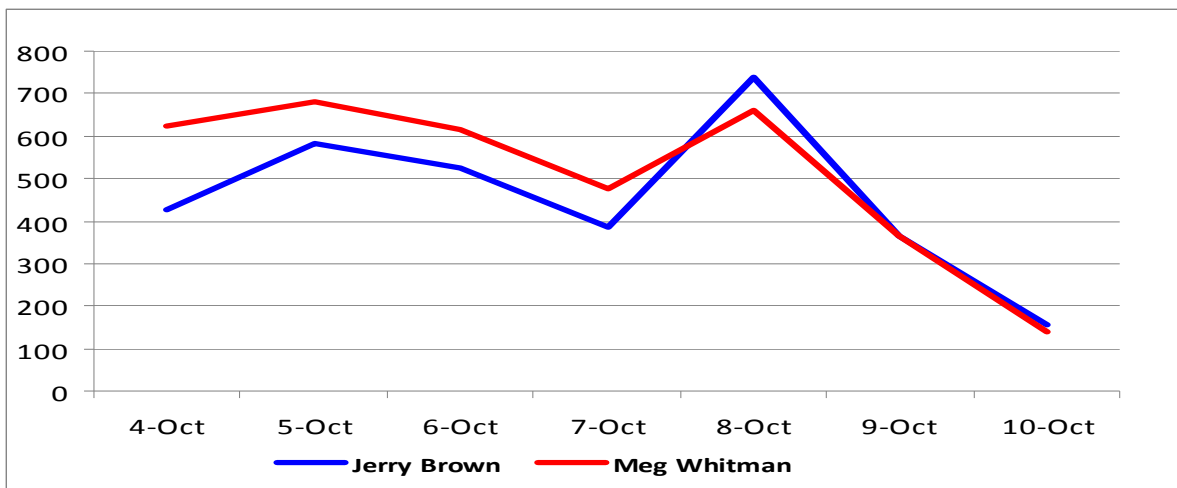


Source: The Nielsen Company 2010
 Note: Percentage based on market share of closed-captioned mentions among the four California DMAs studied for this analysis

Online Buzz

News reports related to Brown’s voicemail gaffe drove his big gain in national online buzz on October 8 as the story eclipsed Whitman’s defense of formerly employing an undocumented housekeeper.

TOTAL CALIFORNIA GOVERNOR’S RACE BUZZ, 10/4 to 10/10/10



Source: NM Incite 2010



**MEDIA ANALYSIS
CALIFORNIA SENATE RACE
Barbara Boxer (D) vs. Carly Fiorina (R)
Week of October 4, 2010**

Summary

While Republican Carly Fiorina made a serious move in the advertising battle last week, Democratic incumbent Barbara Boxer still ran more overall ads. Boxer continues to receive good news in polling results, driving positive online buzz.

TV Advertising

Fiorina more than tripled her week-over-week advertising output last week, making up a lot of ground against Boxer—including a lead in the San Diego market. Boxer’s steady fundraising, however, still allowed her to run over 400 more ads than Fiorina overall.

TV Advertising Activity, 9/27 to 10/3/10

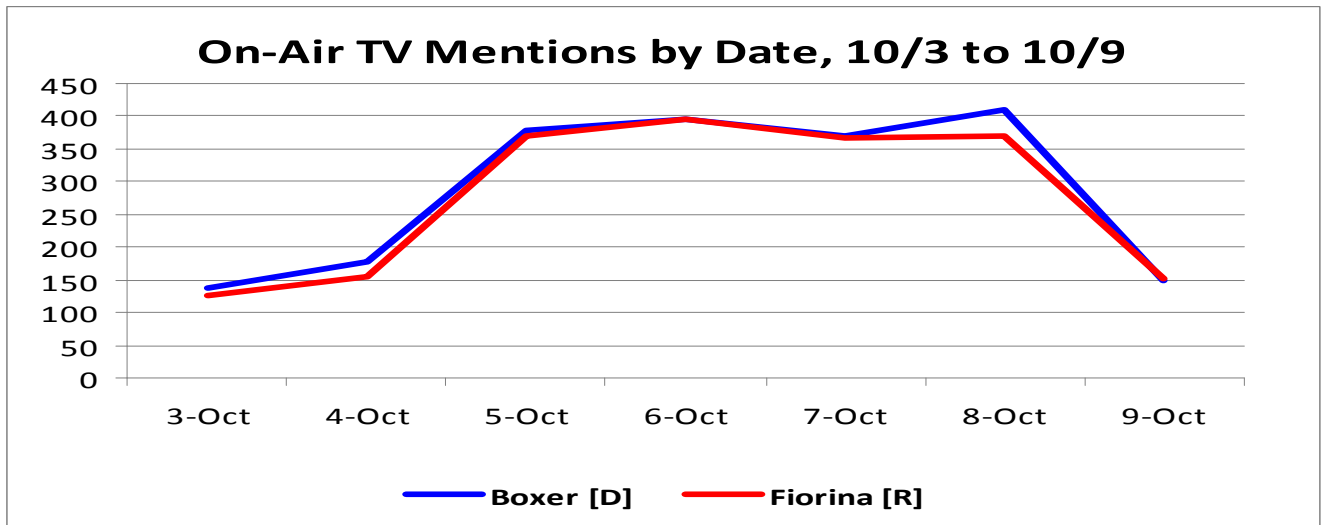
	Los Angeles DMA	Sacramento DMA	San Diego DMA	San Francisco DMA	TOTAL
Boxer	612	214	273	483	1582
Fiorina	418	211	326	223	1178

Source: The Nielsen Company 2010

Note: Totals based on ads appearing in the Los Angeles, Sacramento, San Diego, and San Francisco DMAs

TV Presence

In an analysis of overall television exposure, the candidates largely tracked each other in on-air mentions throughout the week. Much of the exposure came in the form of negative ads attacking each candidate.

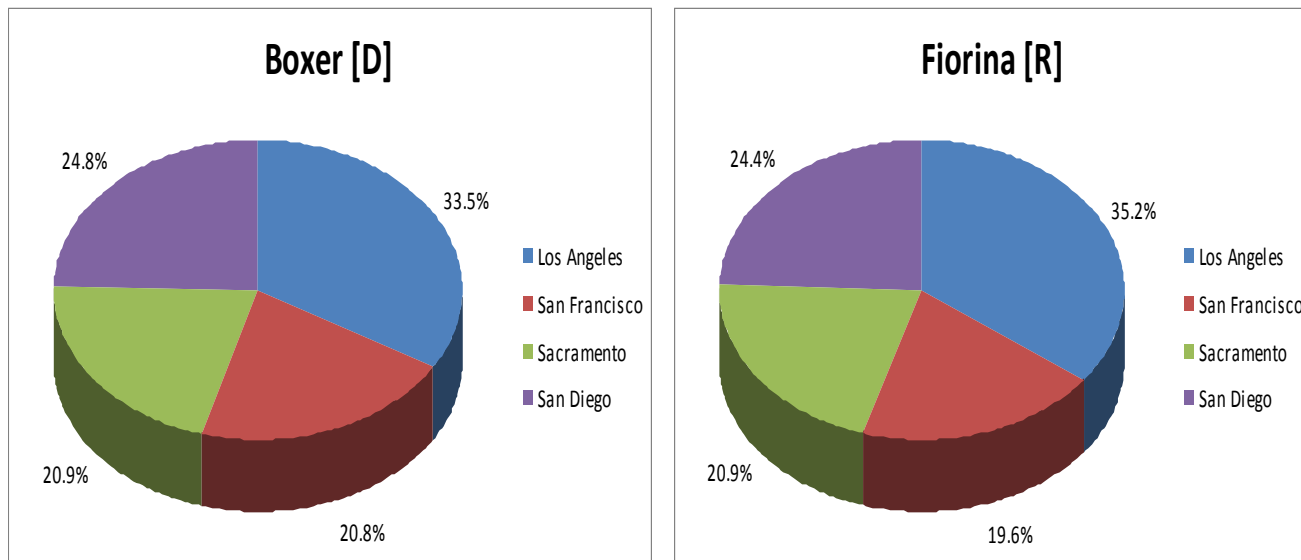


Source: The Nielsen Company 2010

Note: Totals based on all closed-captioned mentions of candidate names airing on 31 stations across California’s top four DMAs

A market-by-market analysis of TV exposure is dramatically equal for the campaigns. No one market represents more than a 2% difference in comparative share of TV mentions.

TOTAL ON-AIR MENTIONS, BY MARKET
October 3 to October 9



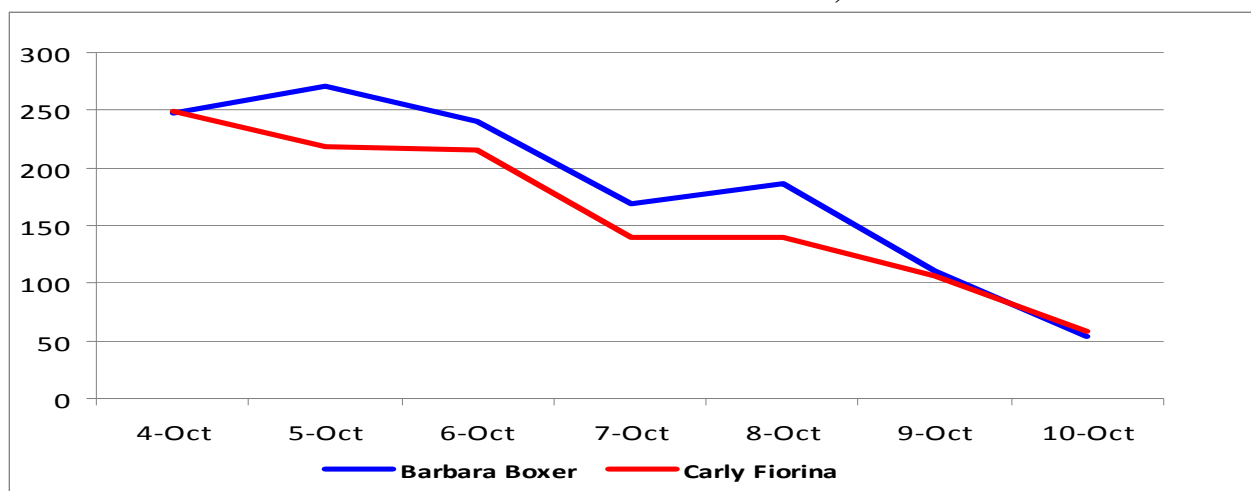
Source: The Nielsen Company 2010

Note: Percentage based on market share of closed-captioned on-air mentions on 31 stations across California's top four DMAs

Online Buzz

The release of polling results favorable to Boxer drove online buzz at the beginning of last week, and Boxer, for the most part, held onto a small lead as buzz dwindled for both campaigns towards the latter half of the week.

TOTAL CALIFORNIA SENATE RACE BUZZ, 10/4 to 10/10/10



Source: NM Incite 2010



**MEDIA ANALYSIS
FLORIDA SENATE RACE
Kendrick Meek (D) vs. Marco Rubio (R) vs. Charlie Crist (I)
Week of October 4, 2010**

Summary

In the three-way campaign to represent Florida in the US Senate, Governor Charlie Crist continues to lead the advertising battle across the board, despite a surge in activity from Republican Marco Rubio. Both Rubio and Crist continue to outpace Democrat Kendrick Meek in total on-air and online presence.

TV Advertising

Each of the three campaigns increased its advertising presence last week, with Rubio nearly doubling his ad quantity week-over-week. Crist, however, continued his ad dominance. He secured the overall lead with over 500 more ads than Rubio, and, with more than three times the number of ads running in Jacksonville compared to the previous week, Crist led the ad race in each of the five major markets.

**Florida TV Advertising Activity, By Market
10/4 to 10/10/10**

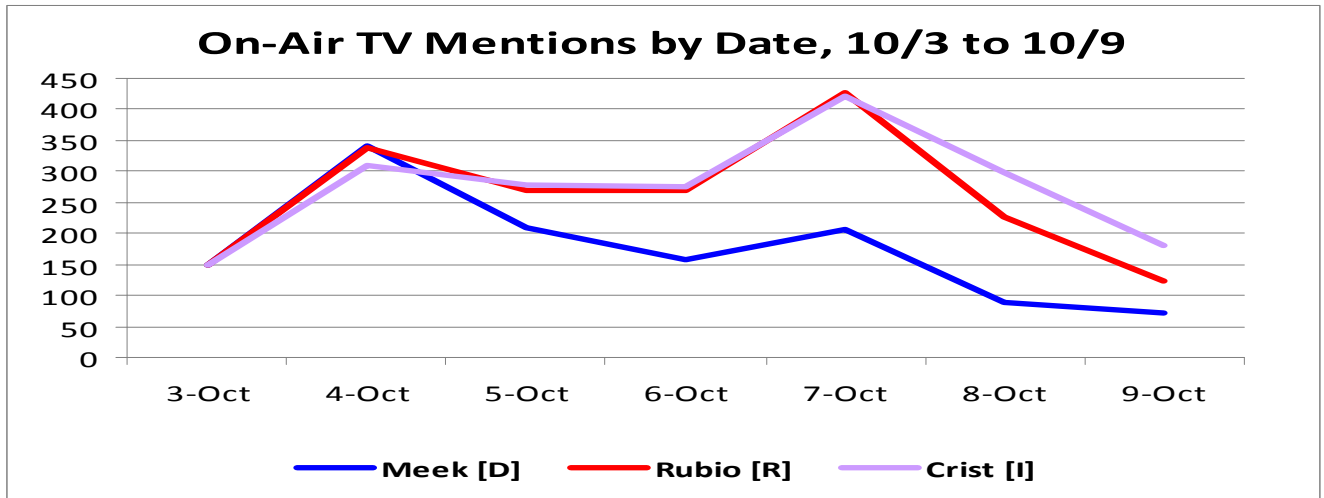
	Jacksonville	Miami	Orlando	Tampa-St. Pete	W Palm Beach	TOTAL
Meek	155	192	101	197	120	765
Rubio	118	207	248	281	184	1038
Crist	179	390	316	441	241	1567

Source: 2010 The Nielsen Company

Note: Totals based on ads appearing in the Jacksonville, Miami, Orlando, Tampa, and West Palm Beach DMAs

TV Presence

In an analysis of overall TV exposure - including paid and free media mentions - Meek trailed off in prominence as the week progressed. Meanwhile, Crist and Rubio battled for the most mentions throughout most of the week, even as much of it came through negative attack ads.

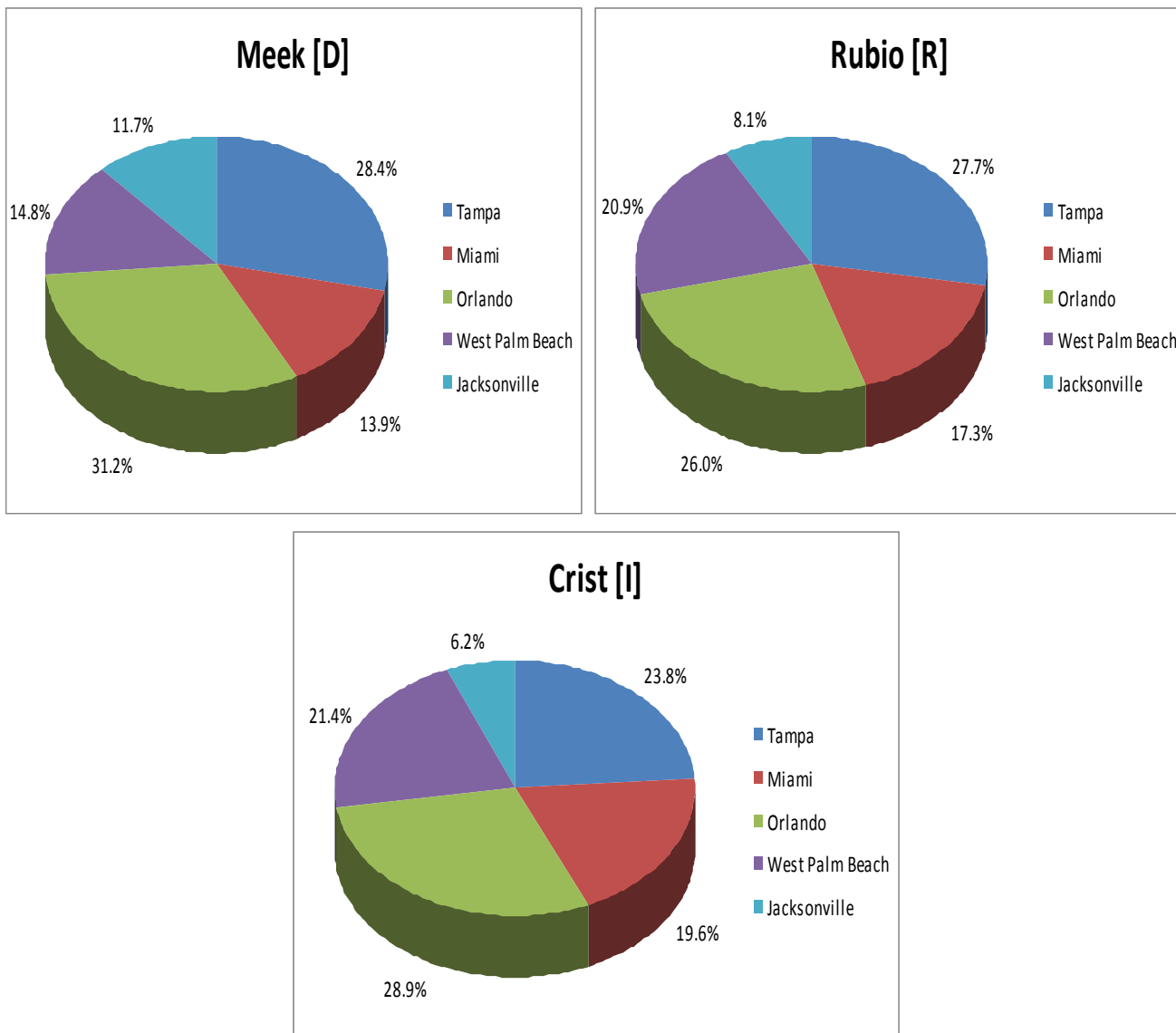


Source: 2010 The Nielsen Company

Note: Totals based on all closed-captioned mentions of candidate names airing on 34 stations across Florida's top five DMAs

The market-by-market analysis of total TV exposure once again showed how similarly spread the mentions are for each of the three candidates. Tampa and Orlando continue to represent the biggest shares of mentions across the board. Rubio and Crist received more attention than Meek in West Palm Beach last week, but Meek had the most on-air exposure in Jacksonville.

TOTAL ON-AIR MENTIONS, BY MARKET
October 3 to October 9



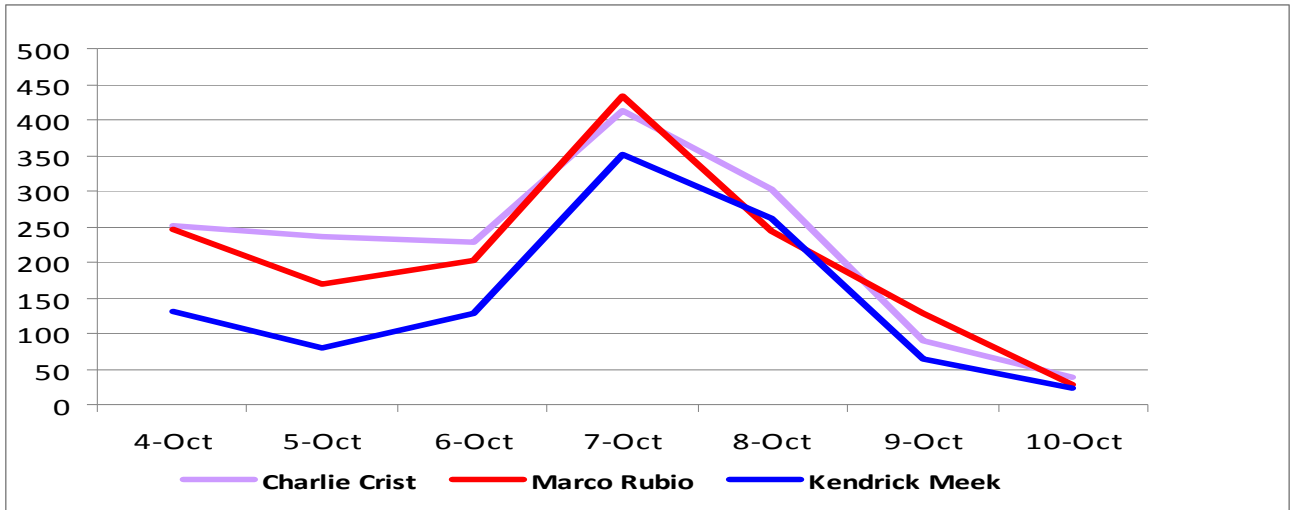
Source: The Nielsen Company 2010

Note: Percentages based on market share of closed-captioned on-air mentions in 34 stations in the five Florida DMAs studied for this analysis

Online Buzz

An NM Incite analysis of national online buzz shows Meek gained some ground in online attention after trailing by wide margins earlier in the month. The release of a poll on October 7 showing Rubio in the lead drove peaks for all candidates.

TOTAL FLORIDA SENATE RACE BUZZ, 10/4 to 10/10/10



Source: NM Incite 2010



**MEDIA ANALYSIS
FLORIDA GOVERNOR'S RACE
Alex Sink (D) vs. Rick Scott (R)
Week of October 4, 2010**

Summary

Republican Rick Scott continued to put his financial advantage to use against Democrat Alex Sink in last week's gubernatorial race. Scott's dominance in advertising and spending has become a major story of this campaign.

TV Advertising

On the surface, last week's ad race was a one-sided affair. The Sink campaign ran only five total ads in Jacksonville and was silent in Miami, Orlando, Tampa, and West Palm Beach. Scott, meanwhile, blanketed the airwaves with almost 1400 total ads. But ads bought and aired by the Florida Democratic Party helped to balance out Scott's message on the airwaves.

**Florida TV Advertising Activity, By Market
10/4 to 10/10/10**

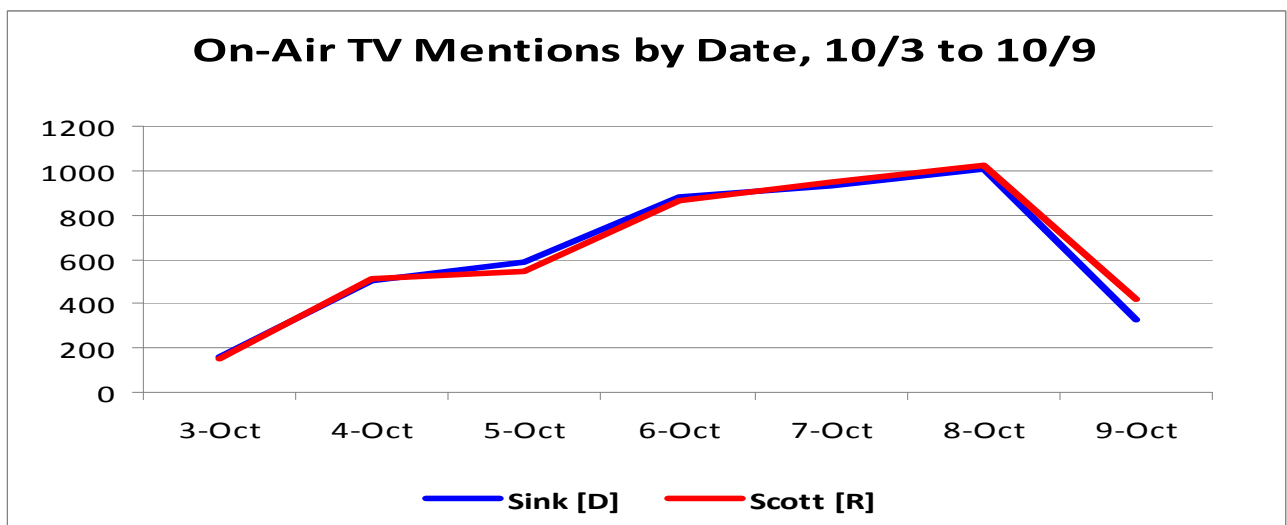
	Jacksonville	Miami	Orlando	Tampa-St. Pete	W Palm Beach	TOTAL
Sink	5	0	0	0	0	5
Scott	237	271	296	380	189	1373

Source: 2010 The Nielsen Company

Note: Totals based on ads appearing in the Jacksonville, Miami, Orlando, Tampa, and West Palm Beach DMAs

TV Presence

An analysis of total TV mentions, whether positive or negative in paid or free media, the candidates paced neck and neck. The mentions of both candidates were typically negative.

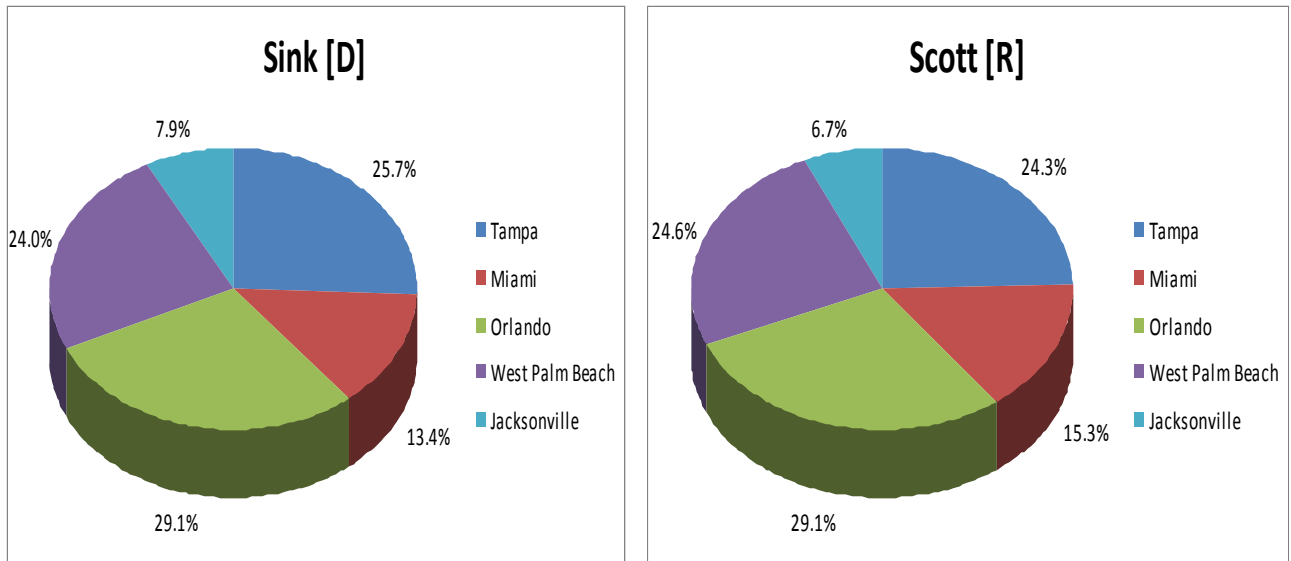


Source: 2010 The Nielsen Company

Note: Totals based on all closed-captioned mentions of candidate names airing on 34 stations across Florida's top five DMAs

A market-by-market analysis of total on-air mentions indicates both campaigns are relying on Tampa and Orlando for the bulk of their coverage. Overall, all markets account for very similar shares of exposure for both campaigns.

**TOTAL ON-AIR MENTIONS, BY MARKET
October 3 to October 9**



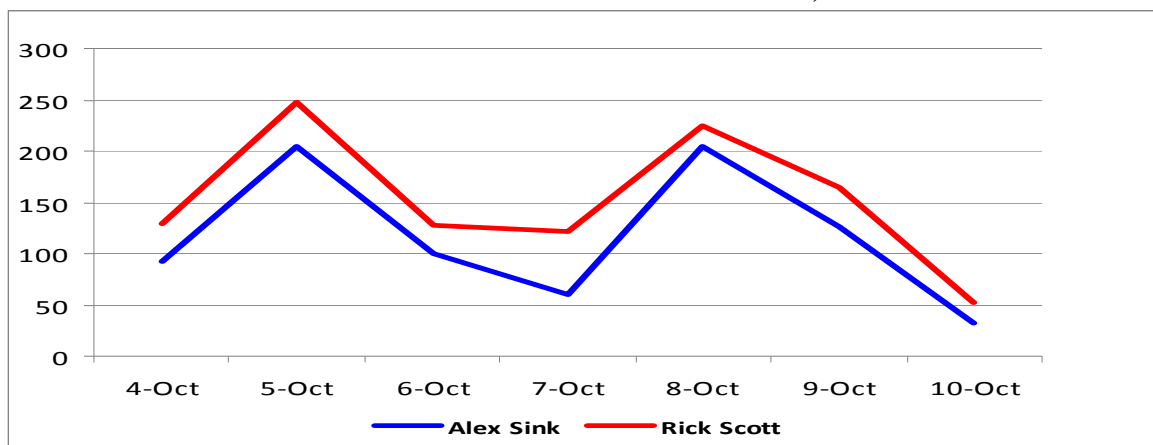
Source: The Nielsen Company 2010

Note: Percentages based on market share of closed-captioned on-air mentions in 34 stations in the five Florida DMAs studied for this analysis

Online Buzz

Poll results and a debate on October 8 drove respective peaks in online buzz last week, but Scott held a small and steady lead throughout it all.

TOTAL FLORIDA GOVERNOR'S RACE BUZZ, 10/4 to 10/10/10



Source: NM Incite 2010



MEDIA ANALYSIS
MARYLAND GOVERNOR'S RACE
Martin O'Malley (D) vs. Bob Ehrlich (R)
Week of October 4, 2010

Summary

While the latest public polls appear to be in Democratic Governor Martin O'Malley's favor, Republican Bob Ehrlich accelerated his advertising buy last week as the campaign enters its final stretch.

TV Advertising

Both campaigns significantly upped their advertising presence last week. While Ehrlich made his ad debut in the Washington, DC market and stayed competitive in Baltimore, O'Malley maintained his overall lead in total ad units. Both campaigns ran 10% of their spots in primetime.

Maryland Governor's Race TV Advertising Activity
10/4 to 10/10/10

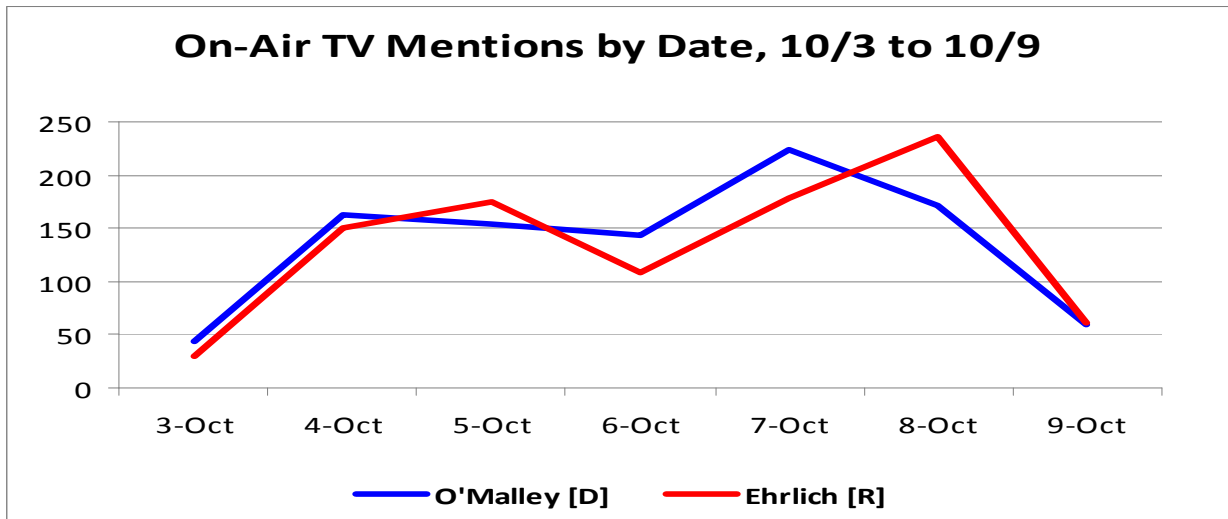
	Baltimore	Washington, DC	TOTAL
O'Malley	406	268	674
Ehrlich	366	183	549

Source: 2010 The Nielsen Company

Note: Totals based on ads appearing in the Baltimore and Washington DMAs

TV Presence

Bruising negative political ads from both sides gave the campaigns alternating leads in overall TV exposure throughout last week.

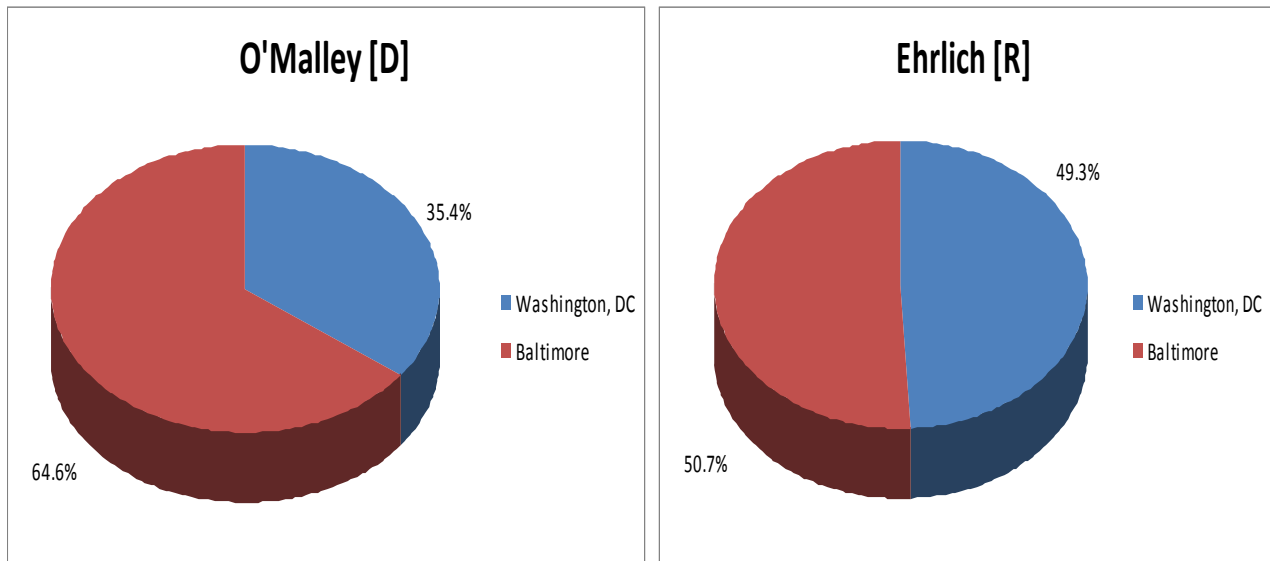


Source: 2010 The Nielsen Company

Note: Totals based on all closed-captioned mentions of candidate names airing on 12 stations across in the Baltimore and Washington DMAs

Ehrlich's advertising debut in Washington helped him even out his market-by-market share of TV presence, while O'Malley is still relying on Baltimore for the majority of his on-air mentions.

TOTAL ON-AIR MENTIONS, BY MARKET
October 3 to October 9



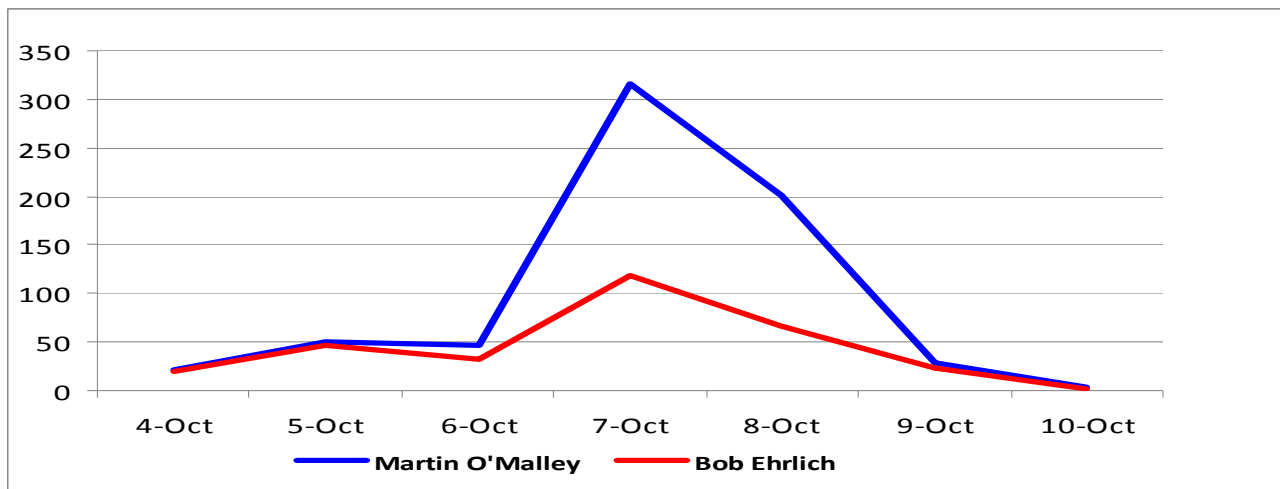
Source: The Nielsen Company 2010

Note: Percentages based on market share of closed-captioned mentions among 12 stations in the two Maryland DMAs studied for this analysis

Online Buzz

An NM Incite analysis shows that a string of favorable poll results for Governor O'Malley drove huge leads in online buzz share in the middle of last week.

TOTAL MARYLAND GOVERNOR'S RACE BUZZ, 10/4 to 10/10/10



Source: NM Incite 2010



**MEDIA ANALYSIS
OHIO SENATE RACE
Lee Fisher (D) vs. Rob Portman (R)
Week of October 4, 2010**

Summary

Republican Rob Portman’s advertising dominance is a major advantage to his campaign against Democrat Lee Fisher. A spirited debate and favorable polling also drove Portman’s lead in national online buzz prominence.

TV Advertising

While airing just two ads in Ohio’s biggest media markets two weeks ago, the Fisher campaign was entirely absent this week—ceding the airwaves to Portman. With a focus in Cleveland, Portman’s ad presence was large across the state.

**Ohio Senate Race - TV Advertising Activity
10/4 to 10/10/10**

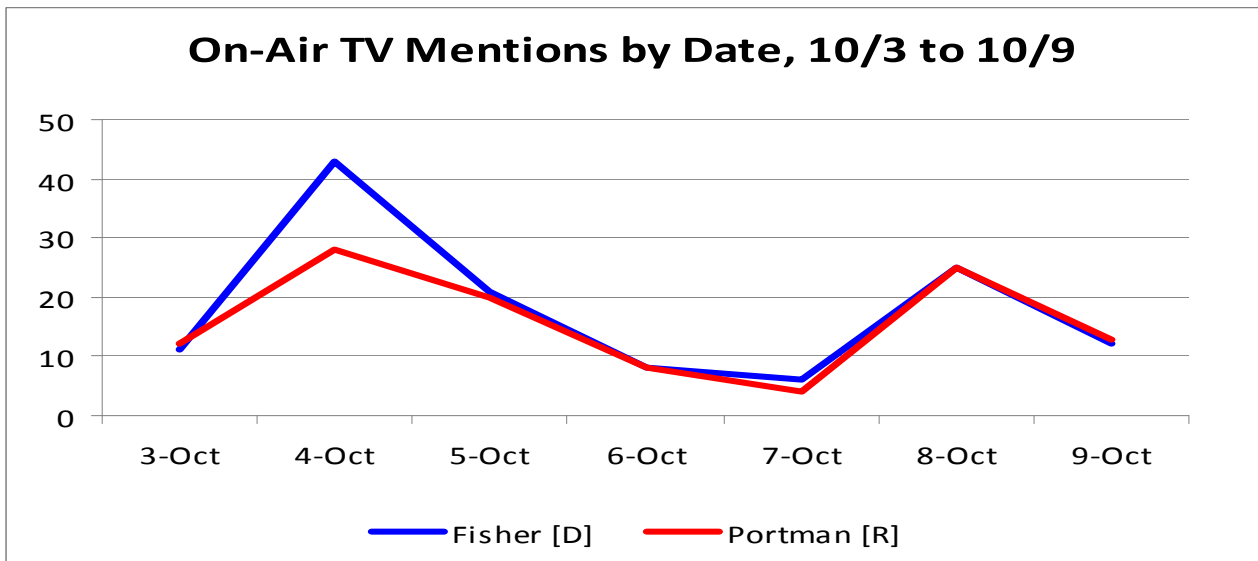
	Cincinnati	Cleveland	Columbus	TOTAL
Fisher	0	0	0	0
Portman	220	337	255	812

Source: 2010 The Nielsen Company

Note: Totals based on all TV ads appearing in the Cincinnati, Cleveland, and Columbus DMAs

TV Presence

Post debate analysis of their October 4 meeting was mostly equal in quantity for both candidates, as their dovetailing TV exposure index shows.

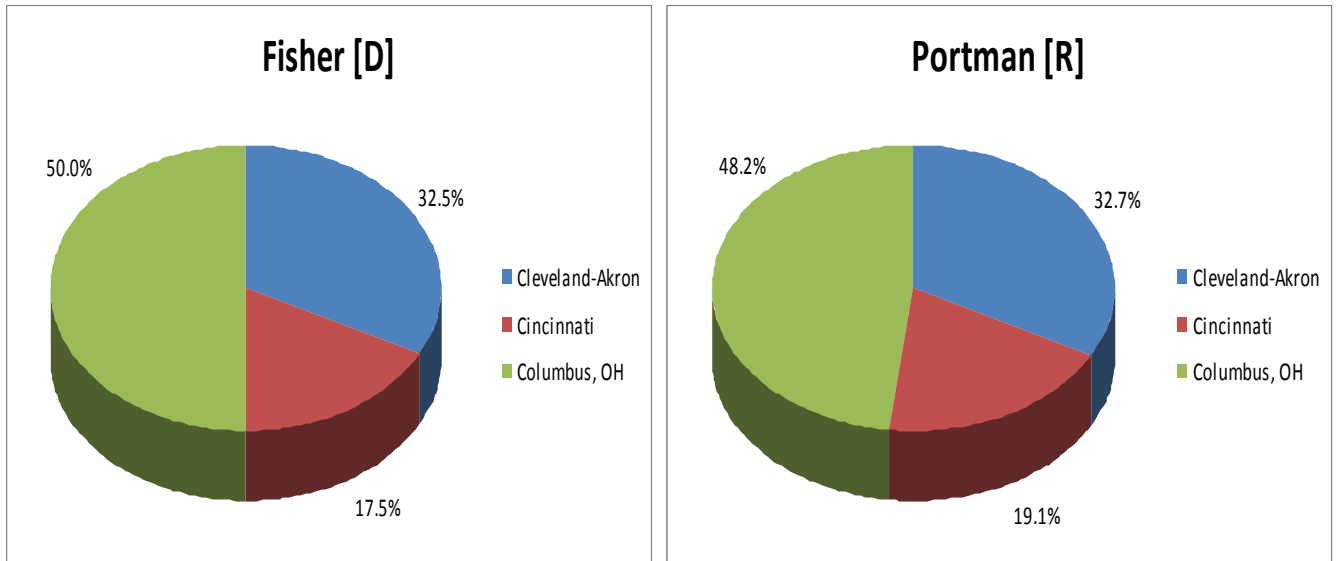


Source: 2010 The Nielsen Company

Note: Totals based on all closed-captioned mentions of candidate names airing on 17 stations across Ohio’s top three DMAs

Both campaigns received about half of their on-air exposure from Columbus, while Cleveland picked up about a third of the share across the top three markets. The Cincinnati market appears to account for less of the coverage than might be expected.

TOTAL ON-AIR MENTIONS, BY MARKET
October 3 to October 9

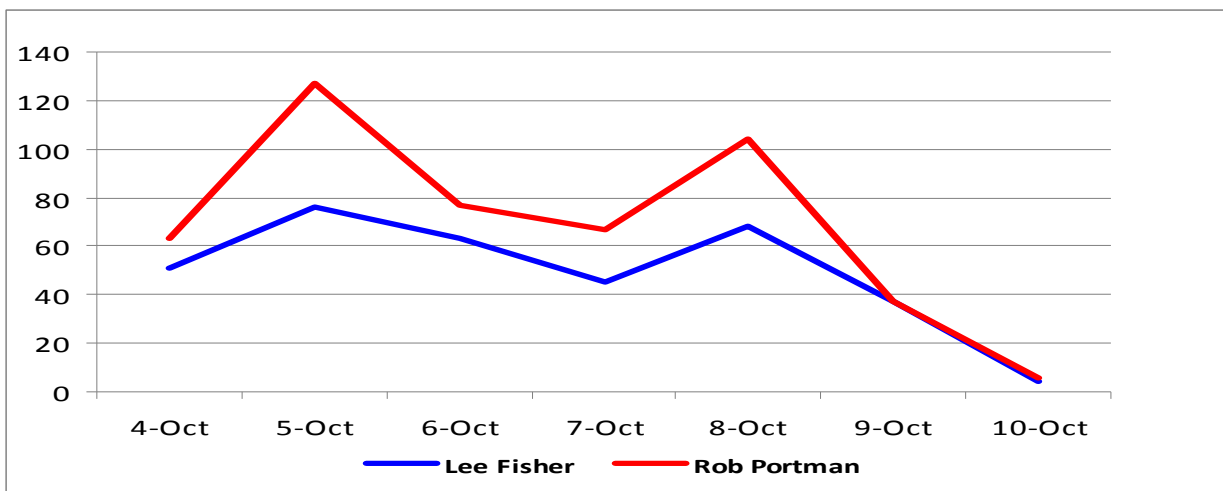


Source: The Nielsen Company 2010
 Note: Totals based on the market share of all closed-captioned mentions of candidate names airing on 17 stations across Ohio's top three DMAs

Online Buzz

Fallout from their October 4 debate drove online buzz in favor of the more nationally known Portman, and a poll result on October 8 also worked to his favor before both candidates dropped in online prominence as the week ended.

TOTAL OHIO SENATE RACE BUZZ, 10/4 to 10/9/10



Source: NM Incite 2010



**MEDIA ANALYSIS
OHIO GOVERNOR'S RACE
Ted Strickland (D) vs. John Kasich (R)
Week of October 4, 2010**

Summary

In his challenge to Democratic Governor Ted Strickland, Republican John Kasich narrowed his advertising deficit last week, but Strickland's steady stream of campaign ads continued to refute Kasich's characterizations of Strickland's record.

TV Advertising

The Kasich campaign almost doubled its week-over-week advertising output in Ohio's three largest media markets last week, even surpassing Strickland in Cincinnati. Strickland, however, managed an increase of his own, maintaining an overall lead.

**Ohio Governor Race - TV Advertising Activity
10/4 to 10/10/10**

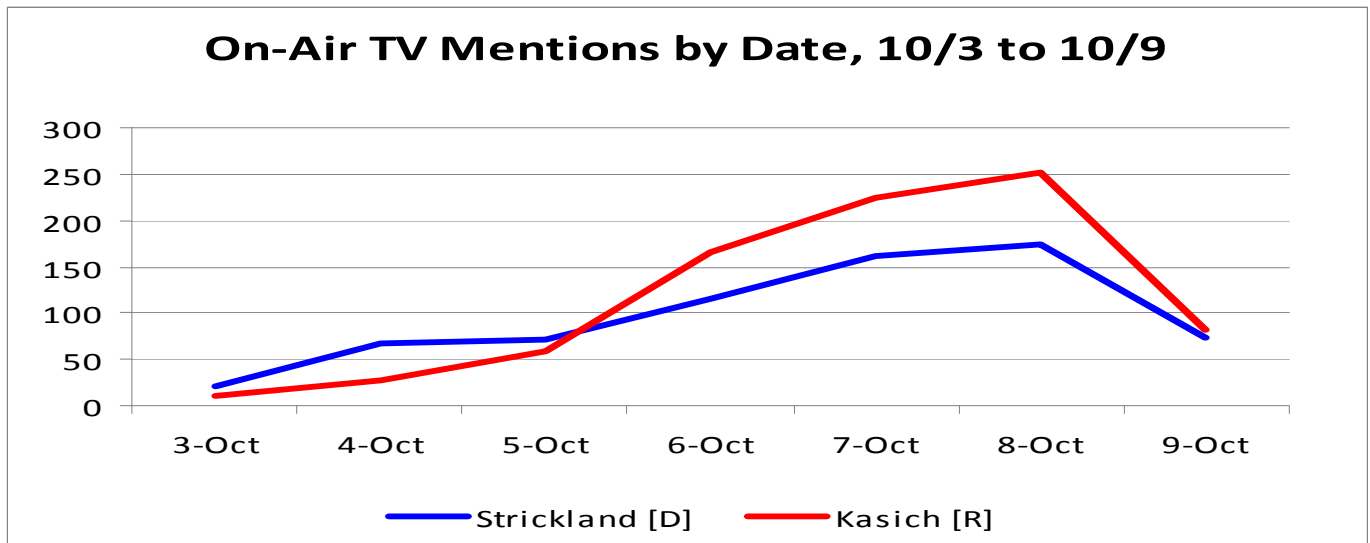
	Cincinnati	Cleveland	Columbus	TOTAL
Strickland	244	435	241	920
Kasich	328	274	215	817

Source: 2010 The Nielsen Company

Note: Totals based on all TV ads appearing in the Cincinnati, Cleveland, and Columbus DMAs

TV Presence

While Kasich's name was mentioned more on television than Strickland at the end of last week, much of his exposure was due to a spike in Strickland's ads that charge Kasich with not telling the truth in his campaign accusations.

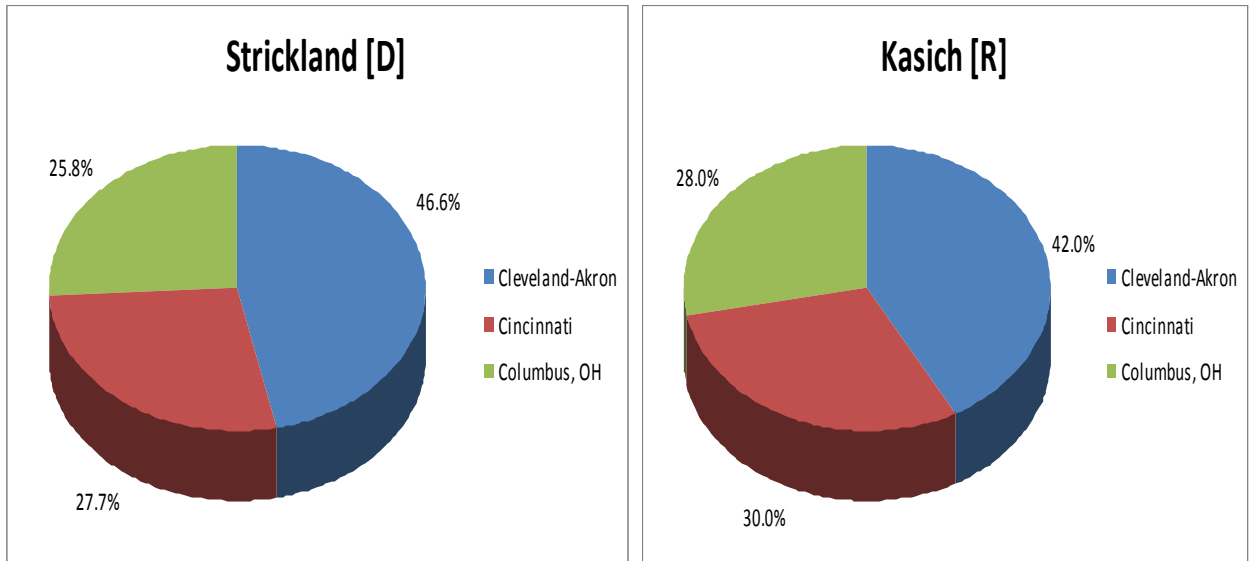


Source: 2010 The Nielsen Company

Note: Totals based on all closed-captioned mentions of candidate names airing on 17 stations across Ohio's top three DMAs

Both campaigns are relying on the Cleveland DMA for the largest chunk of their media exposure, and market shares of on-air mentions are mostly equal for the candidates.

TOTAL ON-AIR MENTIONS, BY MARKET
October 3 to October 9



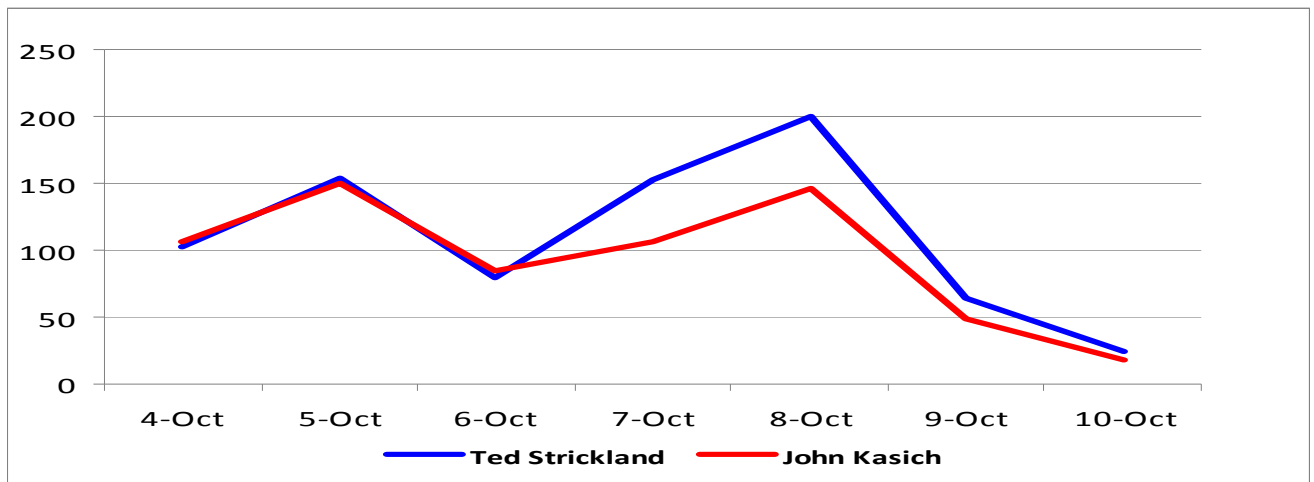
Source: The Nielsen Company 2010

Note: Totals based on the market share of all closed-captioned mentions of candidate names airing on 17 stations across Ohio's top three DMAs

Online Buzz

An NM Incite analysis of Internet buzz indicates that a debate drove a peak in interest for both campaigns on October 8, but Strickland appears to have received more scrutiny.

TOTAL OHIO GOVERNOR RACE BUZZ, 10/4to 10/10/10



Source: NM Incite 2010



**MEDIA ANALYSIS
PENNSYLVANIA SENATE RACE
Joe Sestak (D) vs. Pat Toomey (R)
Week of October 4, 2010**

Summary

In the Pennsylvania US Senate race, Republican Pat Toomey increased his advertising lead last week over Democrat Joe Sestak. But support from the DSCC is driving a lot of negative discussion about Toomey on-air, and help from the White House is propelling Sestak’s climb in online buzz.

TV Advertising

The big difference in last week’s advertising activity is in the Philadelphia media market. While Toomey increased his ad run week-over-week by almost 100 spots, Sestak significantly decreased his ad activity in the city’s DMA—dropping from 166 to 44. Almost 90% of the ads run by the two campaigns in Philadelphia belonged to Toomey.

**Pennsylvania Senate Race TV Advertising Activity
10/4 to 10/10/10**

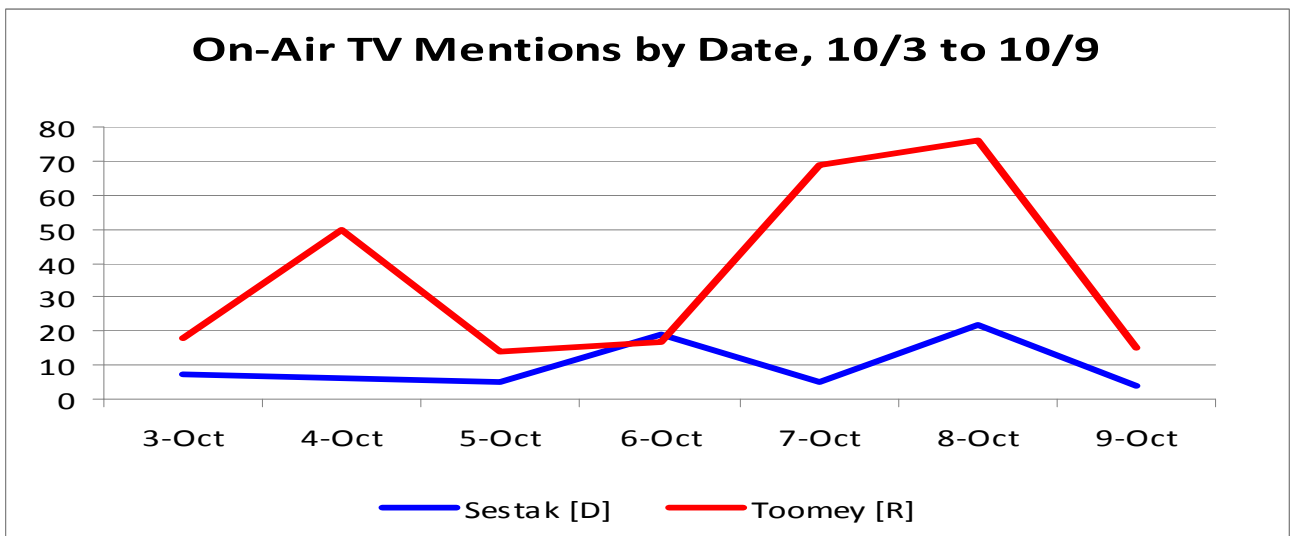
	Philadelphia	Pittsburgh	TOTAL
Sestak	44	216	260
Toomey	380	195	575

Source: 2010 The Nielsen Company

Note: Totals based on ads appearing in the Philadelphia and Pittsburgh DMAs

TV Presence

While Toomey outranked Sestak for most of the week in overall TV exposure, many of his on-air mentions came from negative ads funded by the Democratic Senatorial Campaign Committee. Meanwhile, the bulk of Sestak’s bounce on October 6 came from news about a future campaign event with President Obama.

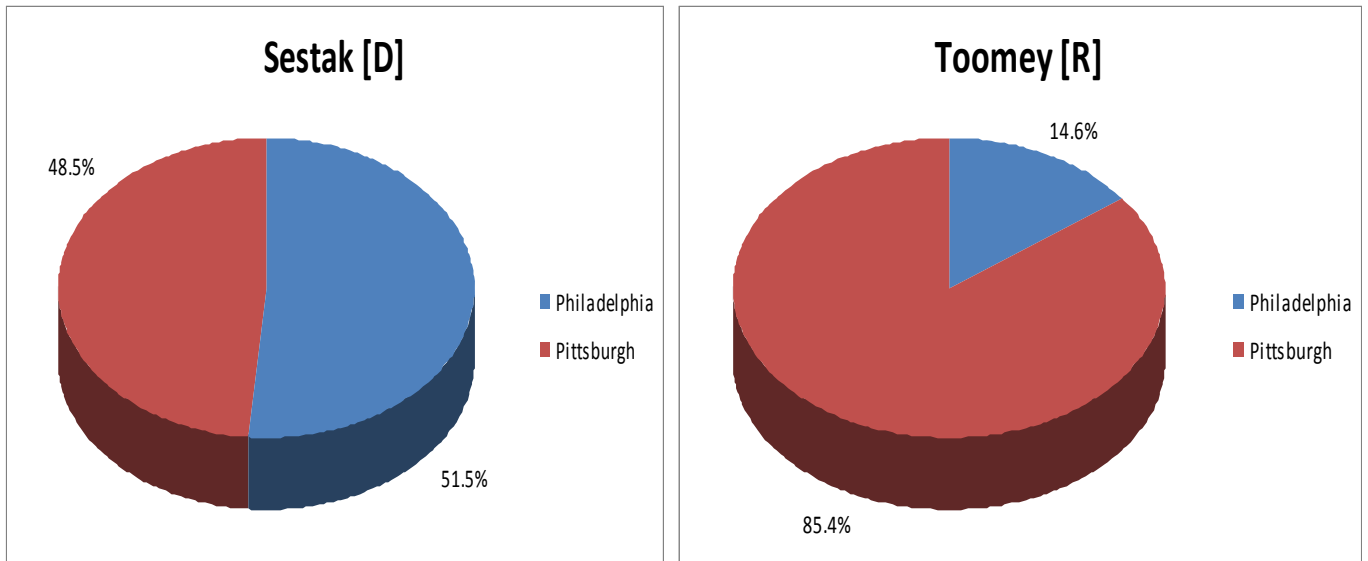


Source: 2010 The Nielsen Company

Note: Totals based on all closed-captioned mentions of candidate names airing on 12 stations across in the Philadelphia and Pittsburgh DMAs

A market-by-market analysis of total TV exposure indicates Toomey is still receiving an overwhelming majority of his on-air mentions in Pittsburgh. Sestak, conversely, has evened out his media presence between the two big markets.

**TOTAL ON-AIR MENTIONS, BY MARKET
October 3 to October 9**



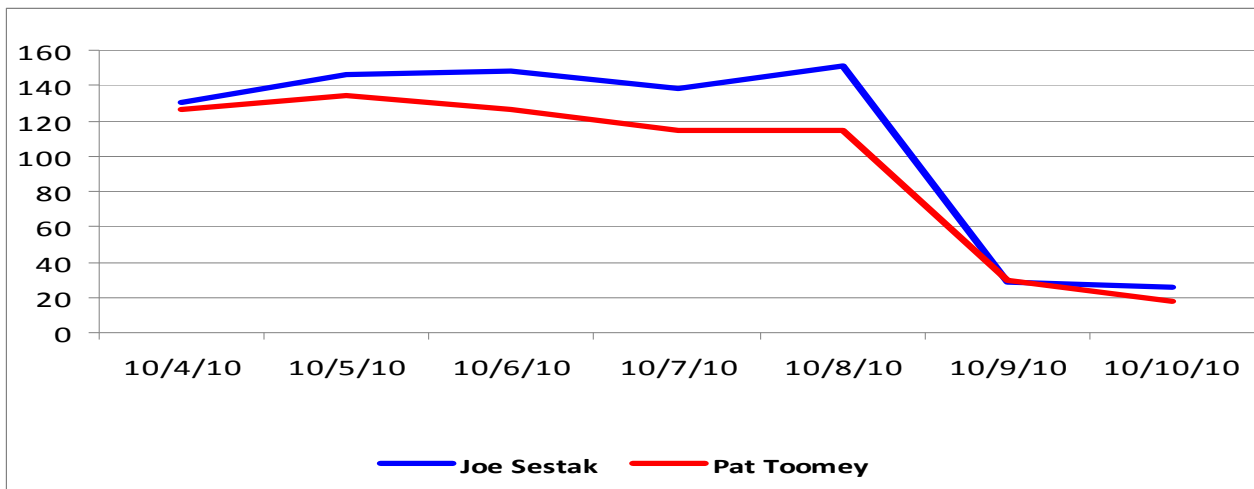
Source: The Nielsen Company 2010

Note: Percentages based on market share of closed-captioned mentions among 12 stations in the two Pennsylvania DMAs studied for this analysis

Online Buzz

According to an NM Incite analysis of national Internet conversations, the Sestak campaign benefitted from buzz surrounding White House support. Both campaigns, however, dropped in overall buzz quantity as the week ended.

TOTAL PENNSYLVANIA SENATE RACE BUZZ, 10/4 to 10/10/10



Source: NM Incite 2010