



MEDIA ANALYSIS
FLORIDA SENATE RACE
Kendrick Meek (D) vs. Marco Rubio (R) vs. Charlie Crist (I)
Week of September 27, 2010

Summary

In the competitive race to represent Florida in the US Senate, Governor Charlie Crist continues to blanket the airwaves with ads, far outpacing both Republican Marco Rubio and Democrat Kendrick Meek. Crist and Rubio continue to trade leads in online buzz, but all three candidates are keeping their names on-air as the race moves into the final stretch.

TV Advertising

The Crist campaign opened up a big lead in the television ad war last week, airing nearly 50% more ads than it ran the week before. While Meek and Rubio both moderately increased their ad buys, Crist’s 1296 total ads across the five major markets still outnumber the combined total from his two opponents. Overall, 7% of Crist’s ads and 10% of Rubio’s ads were in primetime slots, compared to just 1% for Meek.

Florida TV Advertising Activity, By Market
9/27 to 10/3/10

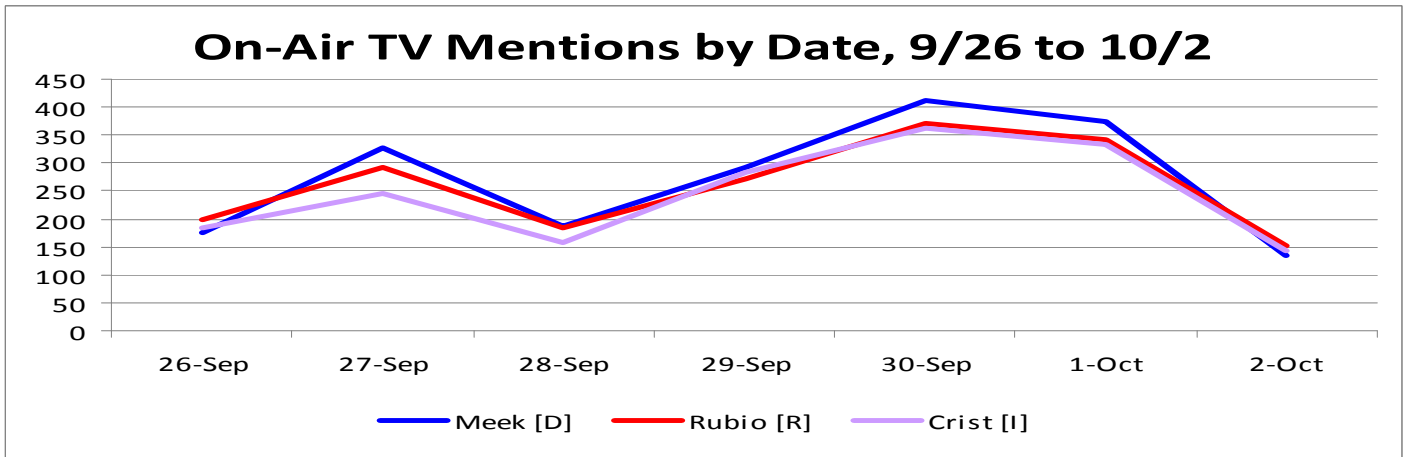
	Jacksonville	Miami	Orlando	Tampa-St. Pete	W Palm Beach	TOTAL
Meek	108	150	105	142	100	605
Rubio	69	6	137	216	113	541
Crist	63	295	316	398	224	1296

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 total television exposure based on total mentions—whether in paid or free media, positive or negative—all three candidates track very parallel paths in exposure. While Meek received slightly more mentions for several days last week, the lead tapered off as the week ended.

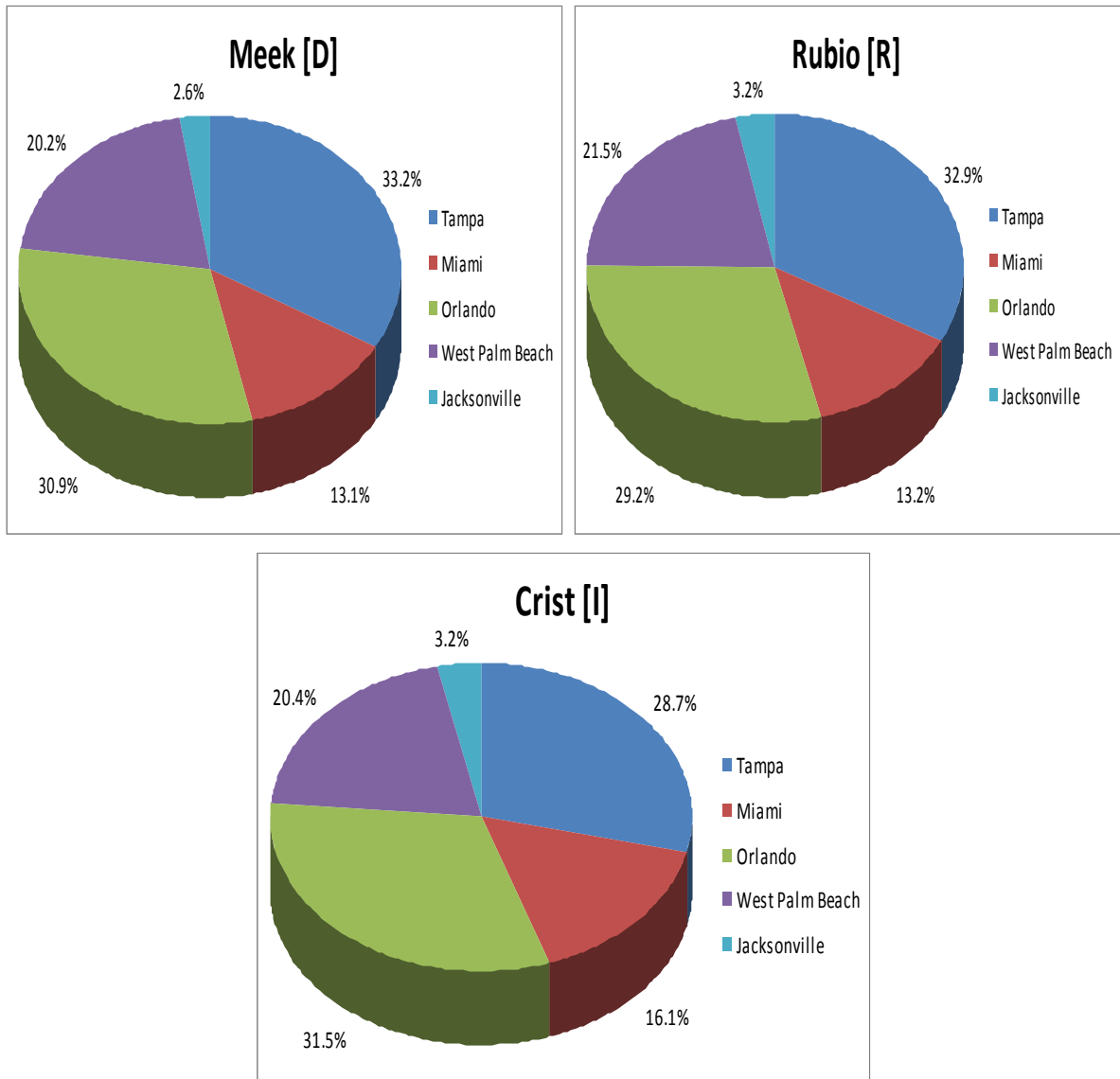


Source: 2010 The Nielsen Company

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

The three-way campaign proves very similar again in a market-by-market analysis of total TV exposure. No one market accounts for more than a 3% difference in market-share exposure for any one candidate.

TOTAL ON-AIR MENTIONS, BY MARKET
September 26 to October 2

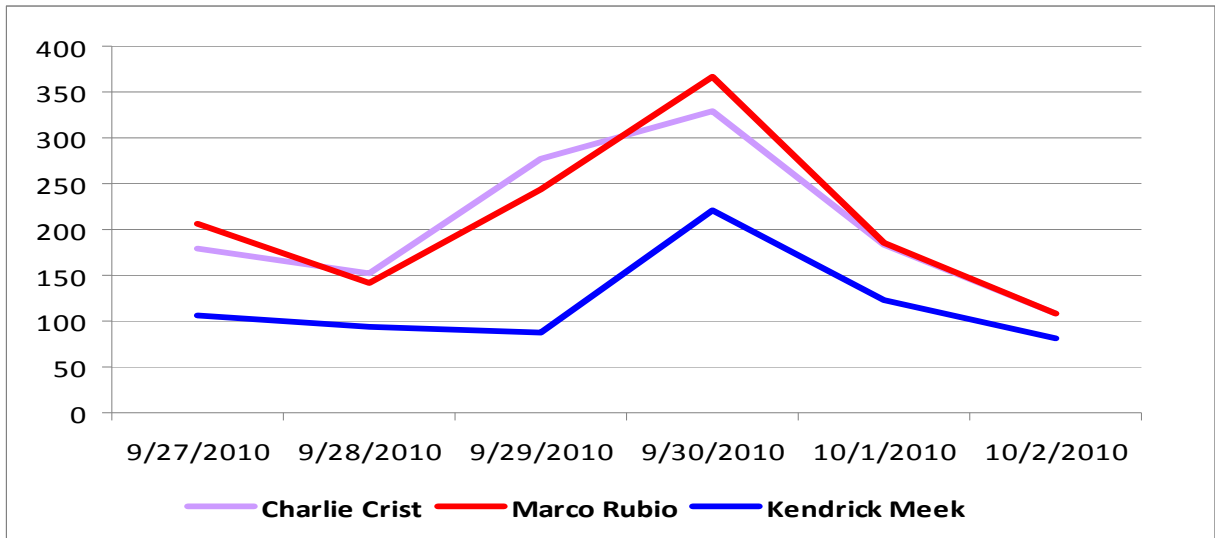


Source: The Nielsen Company 2010
 Note: Percentages based on market share of closed-captioned on-air mentions in 34 stations in the five Florida DMAs studied for this analysis

Online Buzz

Rubio and Crist continue to trade leads in national online buzz quantity, according to an analysis by NM Incite. Meek continues to trail far behind the more nationally known candidates.

TOTAL FLORIDA SENATE RACE BUZZ, 9/27 to 10/3/10



Source: NM Incite 2010

For more details on Nielsen's campaign media insights, please contact Aaron Lewis at Aaron.Lewis@nielsen.com.



**MEDIA ANALYSIS
FLORIDA GOVERNOR'S RACE
Alex Sink (D) vs. Rick Scott (R)
Week of September 27, 2010**

Summary

With Charlie Crist vacating the Governor's mansion to run for US Senate, the race to succeed him between Republican Rick Scott and Democrat Alex Sink is gaining a lot of attention. Scott, who is self-funding most of his campaign, is miles ahead of Sink in the ad war—including a considerable number of ads attacking Sink's record as state CFO. Meanwhile, poll results favoring Scott drove his lead in Internet chatter.

TV Advertising

While Sink ran fewer than half as many ads this week as the week before, Scott increased his ad buy, giving him a huge advantage. In fact, Scott's ads represented over 80% of the total number of spots run by the two campaigns. While Sink tried to focus her ads in the Tampa market, so did Scott—with 489 more than his opponent. Even as Sink was silent in Miami, Scott aired 344 spots.

**Florida TV Advertising Activity, By Market
9/27 to 10/3/10**

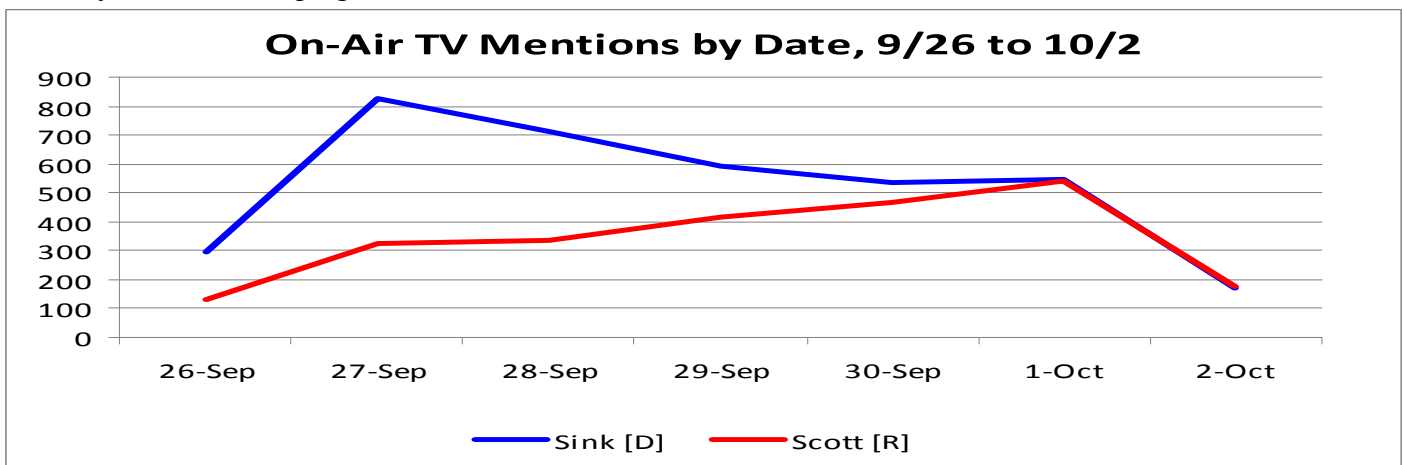
	Jacksonville	Miami	Orlando	Tampa-St. Pete	W Palm Beach	TOTAL
Sink	133	0	138	227	99	597
Scott	490	344	535	716	378	2463

Source: 2010 The Nielsen Company

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

TV Presence

While Sink received more TV exposure last week, the majority of her on-air mentions came in negative ads funded by the Scott campaign.

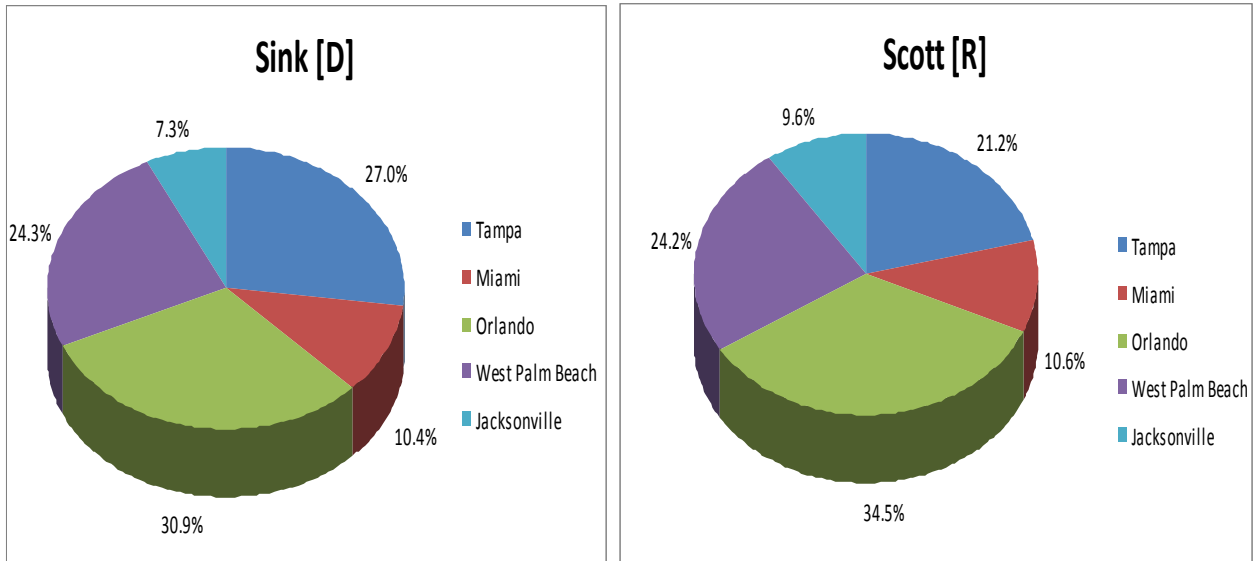


Source: 2010 The Nielsen Company

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

In a market-by-market analysis of total TV exposure, both candidates owe more of their on-air mentions to Orlando than any other market. Overall, both campaigns are receiving very similar proportion of their mentions from all five major Florida DMAs.

TOTAL ON-AIR MENTIONS, BY MARKET
September 26 to October 2



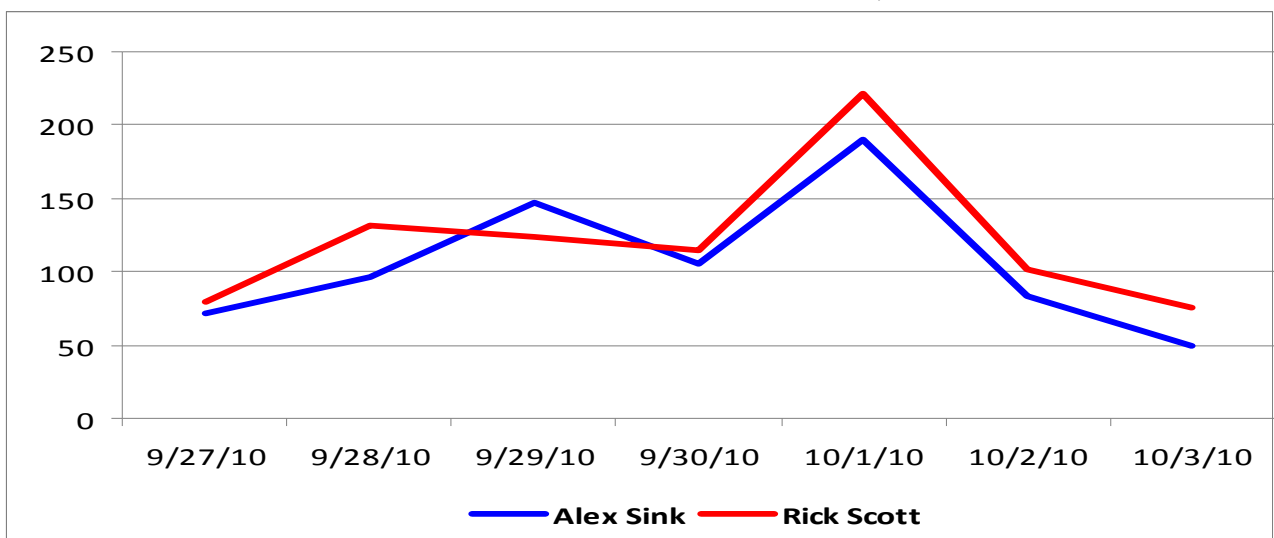
Source: The Nielsen Company 2010

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

In an NM Incite analysis of online buzz surrounding the race, political newcomer Scott held a small lead in 6 of 7 days last week. Both candidates peaked on 10/1 as the blogosphere reacted to the release of two new polls.

TOTAL FLORIDA GOVERNOR'S RACE BUZZ, 9/27 to 10/3/10



Source: NM Incite 2010

For more details on Nielsen's campaign media insights, please contact Aaron Lewis at Aaron.Lewis@nielsen.com.



**MEDIA ANALYSIS
CALIFORNIA GOVERNOR'S RACE
Jerry Brown (D) vs Meg Whitman (R)
Week of Sept. 27, 2010**

Summary

In the race for the Governor's office in California, Republican Meg Whitman's funding advantages continue to facilitate a large lead over Democrat Jerry Brown in the television advertising war. Yet, Brown is far from absent and likely benefited from negative on-air and online discussion of whether Whitman knowingly employed an illegal resident as a housekeeper.

TV Advertising

Whitman's campaign is still outpacing Brown in number of TV ads across California's four major media markets. Whitman increased her ad presence last week in LA, Sacramento, and San Francisco, but ran fewer ads in San Diego—where Brown continues to hold his only market lead. Overall, both candidates are targeting primetime slots: 13% of Whitman's ads ran during prime hours to 12% for Brown.

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

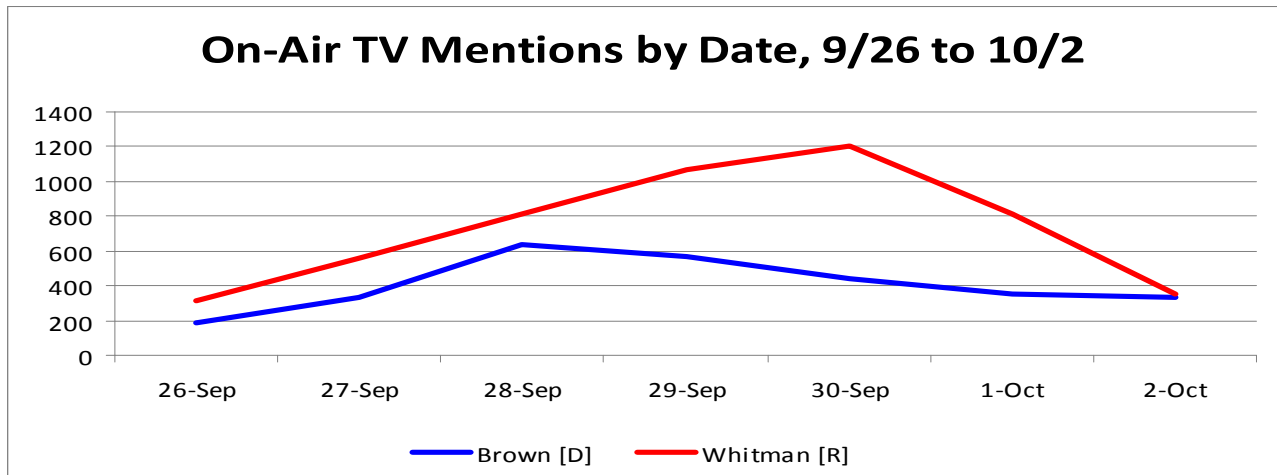
	Los Angeles DMA	Sacramento DMA	San Diego DMA	San Francisco DMA	TOTAL
Brown	616	305	471	373	1765
Whitman	827	592	361	691	2471

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, Whitman clearly outpaced Brown throughout last week. This, of course, may be a mixed blessing, as her spike in TV mentions is largely due to questions about the legal residency status of her former housekeeper.

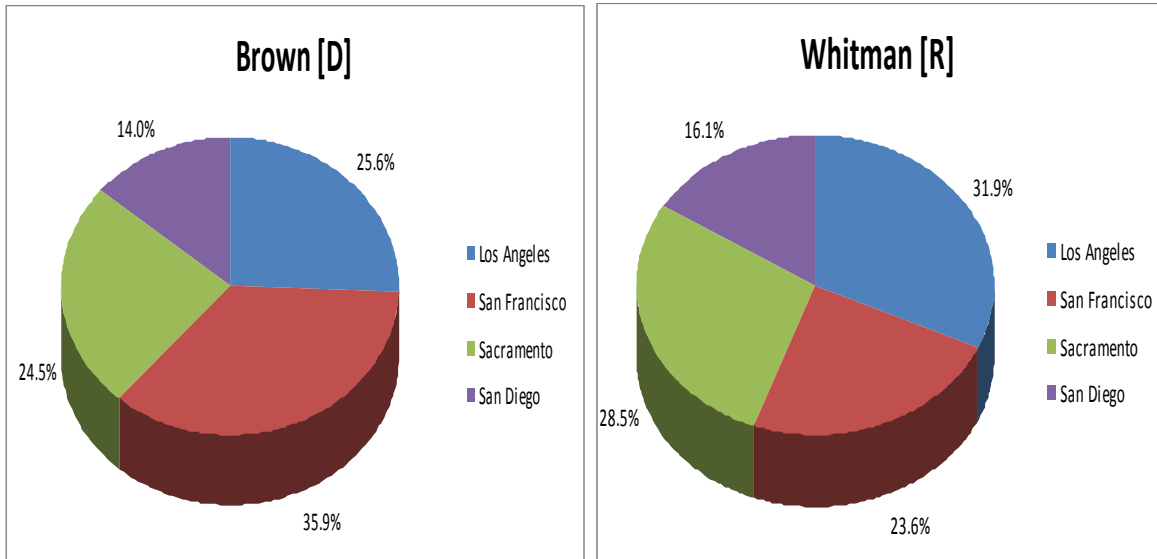


Source: The Nielsen Company 2010

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

In this week's look at market specific TV exposure, Brown's market-by-market footprint is largely the same as last week with San Francisco making up the bulk of his exposure. Whitman, meanwhile, received nearly 10% less of her TV mentions in Sacramento last week, owing to increased exposure in the San Francisco DMA.

TOTAL ON-AIR MENTIONS, BY MARKET
September 26 to October 2



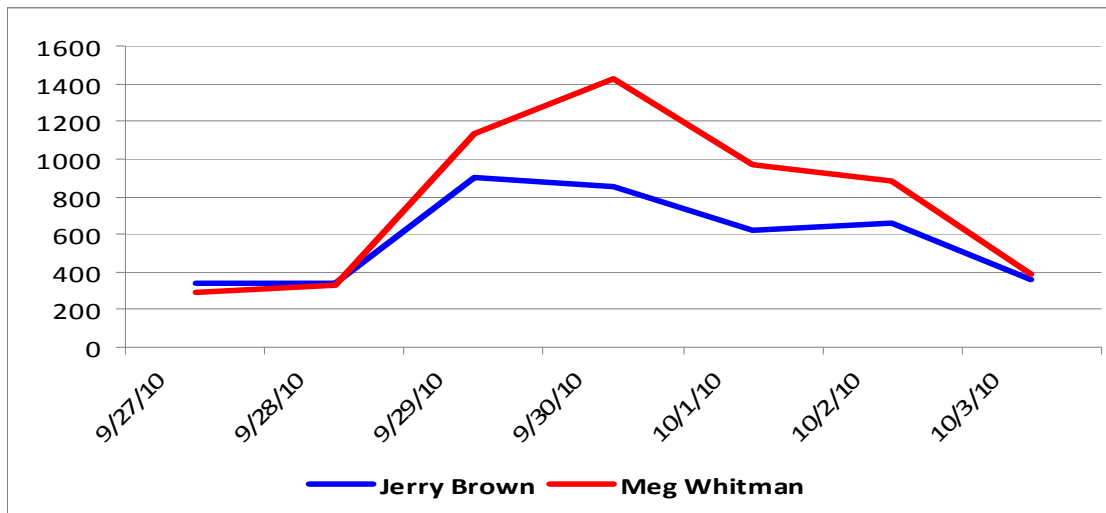
Source: The Nielsen Company 2010

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

Online Buzz

Not surprisingly, the national online buzz centered on the story about Whitman's former housekeeper. An NM Incite analysis shows that, as the story broke on 9/29 and 9/30, Whitman's share of the online conversation peaked.

TOTAL CALIFORNIA GOVERNOR'S RACE BUZZ, 9/27 to 10/3/10



Source: NM Incite 2010

For more details on Nielsen's campaign media insights, please contact Aaron Lewis at Aaron.Lewis@nielsen.com.



**MEDIA ANALYSIS
CALIFORNIA SENATE RACE
Barbara Boxer (D) vs. Carly Fiorina (R)
Week of September 27, 2010**

Summary

In her challenge to Democrat Barbara Boxer, Republican Carly Fiorina has, at last, managed to make a significant splash in the TV advertising battle. Still, it will take a lot more to dent Boxer’s ad lead. Fiorina can find some comfort that she is still generating a lot of buzz—both online and on-air.

TV Advertising

While Fiorina is finally starting to make up some ground on the air, Boxer’s advertising presence is still overwhelmingly dominant. Fiorina concentrated her buy last week in the Los Angeles media market with 66% of her ads running there, but her 250 spots were still just barely over half of Boxer’s 483 in that DMA. Overall, 11% of Fiorina’s ads ran in primetime, compared to 8% of Boxer’s.

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

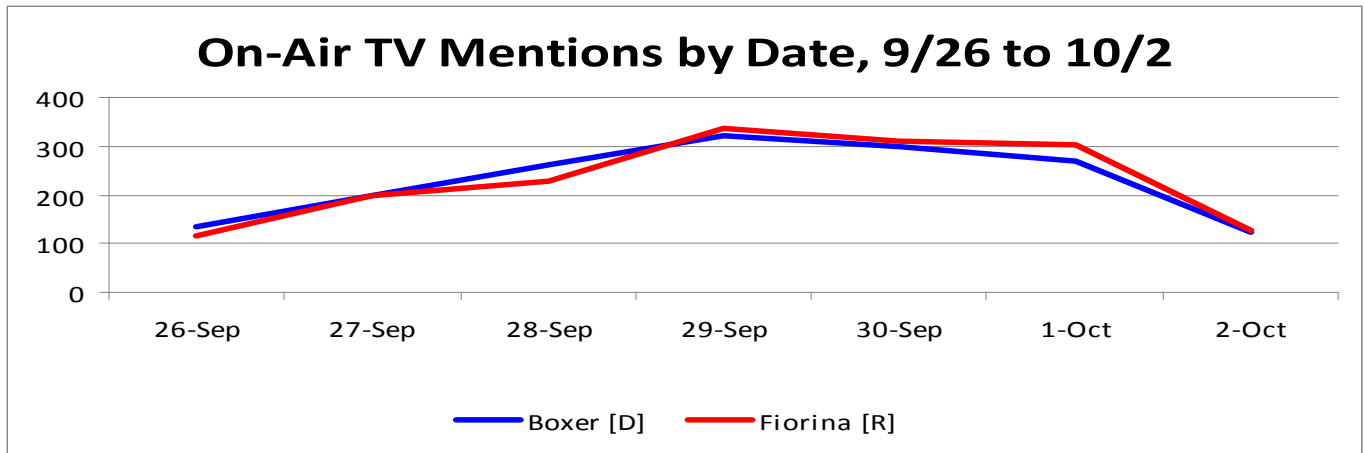
	Los Angeles DMA	Sacramento DMA	San Diego DMA	San Francisco DMA	TOTAL
Boxer	483	193	208	473	1357
Fiorina	250	37	92	0	379

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 television exposure, both paid and free mentions, the candidates tracked relatively equal last week.

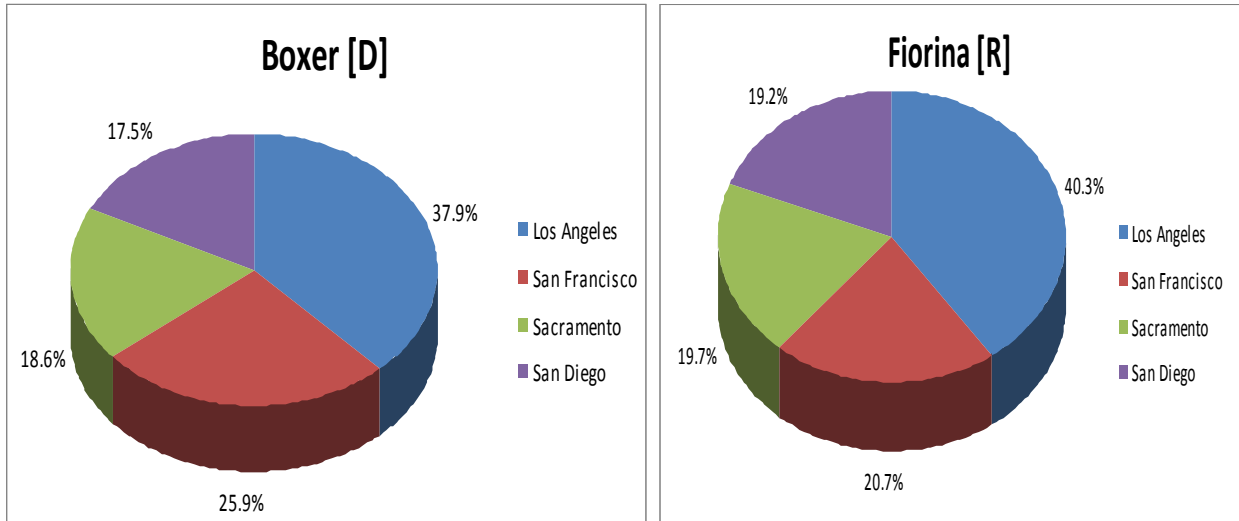


Source: The Nielsen Company 2010

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 look at total television exposure indicates that the Los Angeles DMA accounted for the largest share of on-air mentions for both campaigns last week. And while Boxer appears to get a higher rate of exposure in San Francisco, the market areas are generally showing similar distribution for both candidates.

TOTAL ON-AIR MENTIONS, BY MARKET
September 26 to October 2



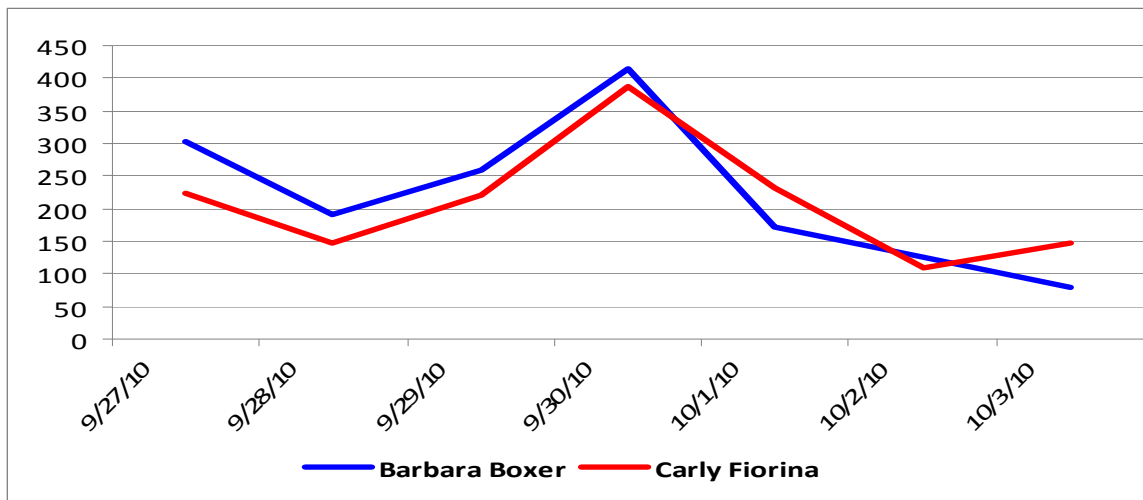
Source: The Nielsen Company 2010

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

Online Buzz

Commentary on an hour-long radio debate on 9/29 drove the online buzz to peak on the following day last week. And, while Boxer continues to rack up endorsements and leads in public polling, an NM Incite analysis shows Fiorina is still managing to gain leads in online buzz quantity—if only for a day or two.

TOTAL CALIFORNIA SENATE RACE BUZZ, 9/27 to 10/3/10



Source: NM Incite 2010

For more details on Nielsen's campaign media insights, please contact Aaron Lewis at Aaron.Lewis@nielsen.com.



**MEDIA ANALYSIS
MARYLAND GOVERNOR'S RACE
Martin O'Malley (D) vs. Bob Ehrlich (R)
Week of September 27, 2010**

Summary

In the rematch of the 2006 gubernatorial campaign, Democratic incumbent Martin O'Malley continues to outpace Republican Bob Ehrlich in the advertising race. Many of O'Malley's ads last week included negative mentions of Ehrlich, contributing to the challenger's lead in overall on-air exposure. Meanwhile, O'Malley's stature in the Democratic Party continues to drive his lead in Internet buzz.

TV Advertising

Overall, Governor O'Malley's campaign ran almost 100 more ads than Ehrlich last week. But, Ehrlich ignored the Washington DMA, allowing him to edge out O'Malley in the number of ads run in the Baltimore market.

**Maryland Governor's Race TV Advertising Activity
9/27 to 10/3/10**

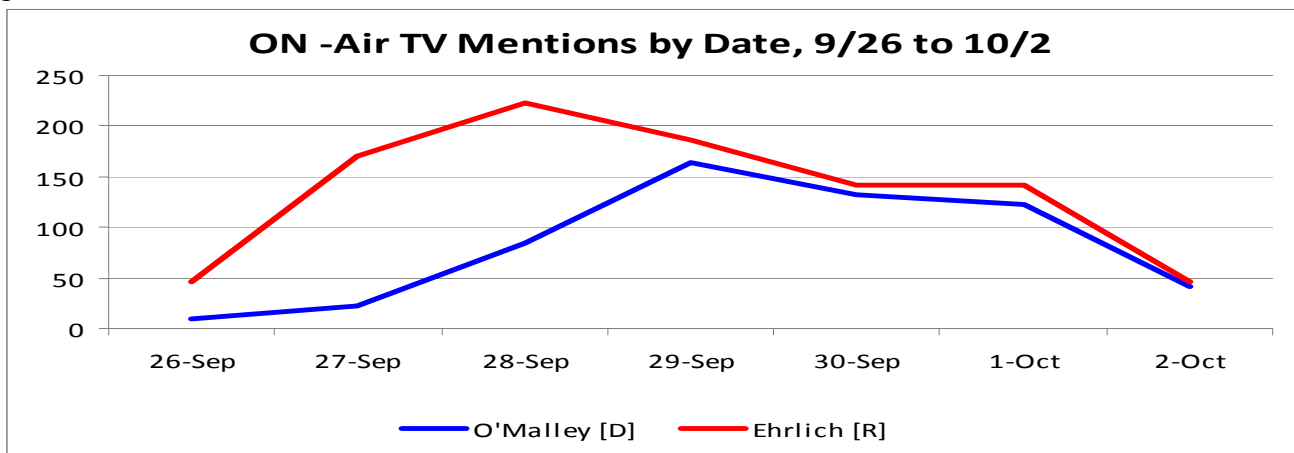
	Baltimore	Washington, DC	TOTAL
O'Malley	275	122	397
Ehrlich	298	0	298

Source: 2010 The Nielsen Company

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

TV Presence

In a measurement of total on-air mentions—paid or free, positive or negative—Ehrlich consistently led O'Malley throughout all of last week. But his bigger lead at the beginning of the week is largely due to negative ads.

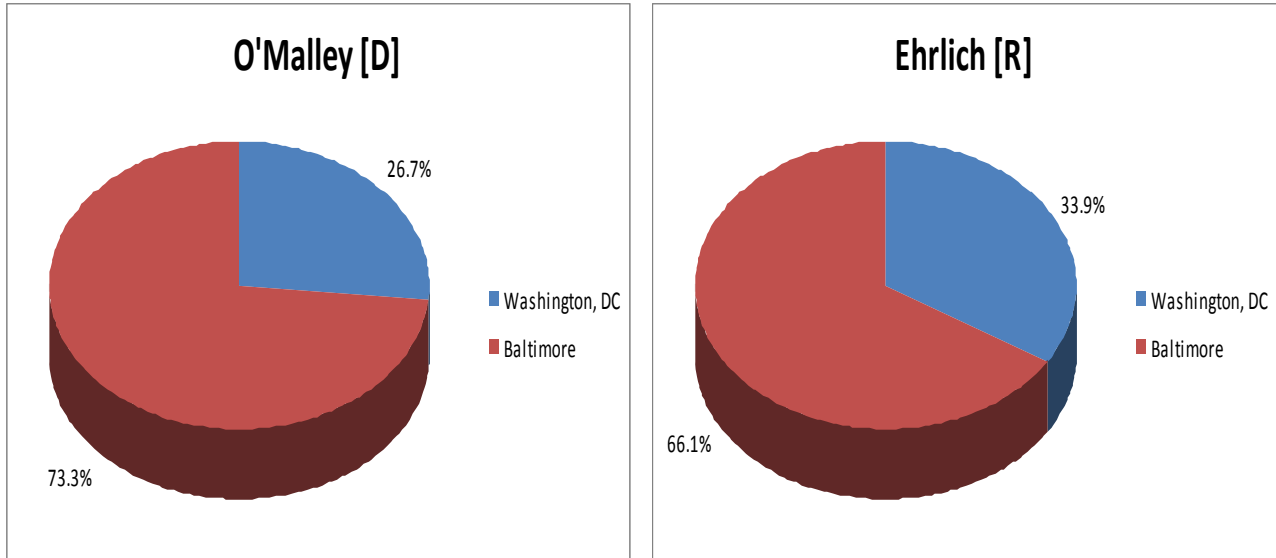


Source: 2010 The Nielsen Company

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

In a market-by-market analysis of total TV exposure, both campaigns find that Baltimore delivers the majority of their total on-air mentions.

TOTAL ON-AIR MENTIONS, BY MARKET
September 26 to October 2



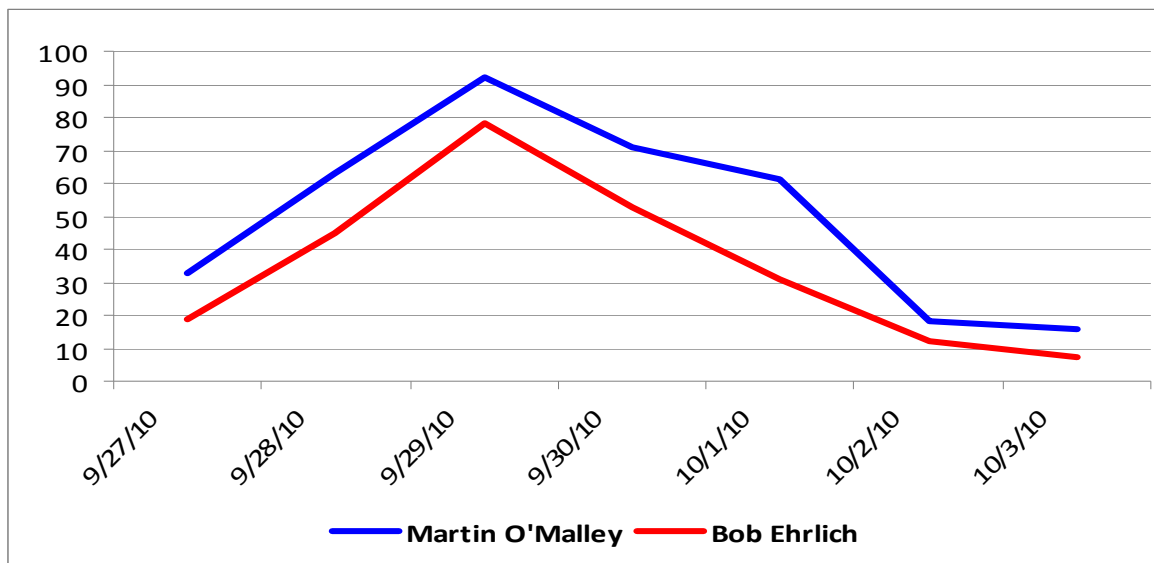
Source: The Nielsen Company 2010

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

Online Buzz

While an analysis by NM Incite shows the candidates' online buzz quantity mostly paralleled each other, O'Malley held a small lead throughout the week. The peak on 9/29 is largely due to two stories: (a) Rudy Giuliani's endorsement of Bob Ehrlich, and (b) news that national Democratic organizations were allocating additional funding to help the O'Malley campaign.

TOTAL MARYLAND GOVERNOR'S RACE BUZZ, 9/27 to 10/3/10



Source: NM Incite 2010

For more details on Nielsen's campaign media insights, please contact Aaron Lewis at Aaron.Lewis@nielsen.com.



**MEDIA ANALYSIS
PENNSYLVANIA SENATE RACE
Joe Sestak (D) vs. Pat Toomey (R)
Week of September 27, 2010**

Summary

In the campaign to represent Pennsylvania in the US Senate, Republican Pat Toomey continues to air more ads than Democrat Joe Sestak. But while Toomey may be getting the most on-air TV exposure, not all of it is positive.

TV Advertising

Toomey still leads the overall advertising battle in Pennsylvania's two biggest media markets. A bigger buy this week for Sestak, however, allowed him to close the gap in Pittsburgh. Toomey, who had been airing his ads in equal numbers across the two markets, boosted his presence in Philadelphia last week.

**Pennsylvania Senate Race TV Advertising Activity
9/27 to 10/3/10**

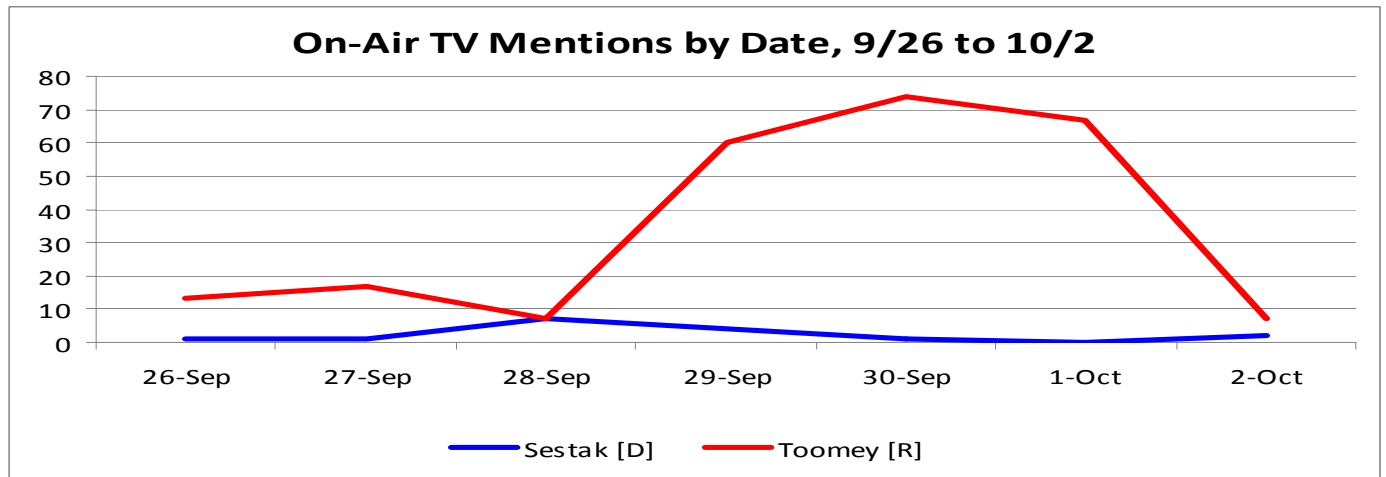
	Philadelphia	Pittsburgh	TOTAL
Sestak	166	148	314
Toomey	286	203	489

Source: 2010 The Nielsen Company

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

TV Presence

A big spike for Toomey in total TV exposure (including paid and free media, both positive or negative) on 9/29 through 10/1 is actually not great news for his campaign. The boost is due largely to a big negative ad campaign funded by the Democratic Senatorial Campaign Committee. The DSCC went heavy with ads linking Toomey to former President George W. Bush.

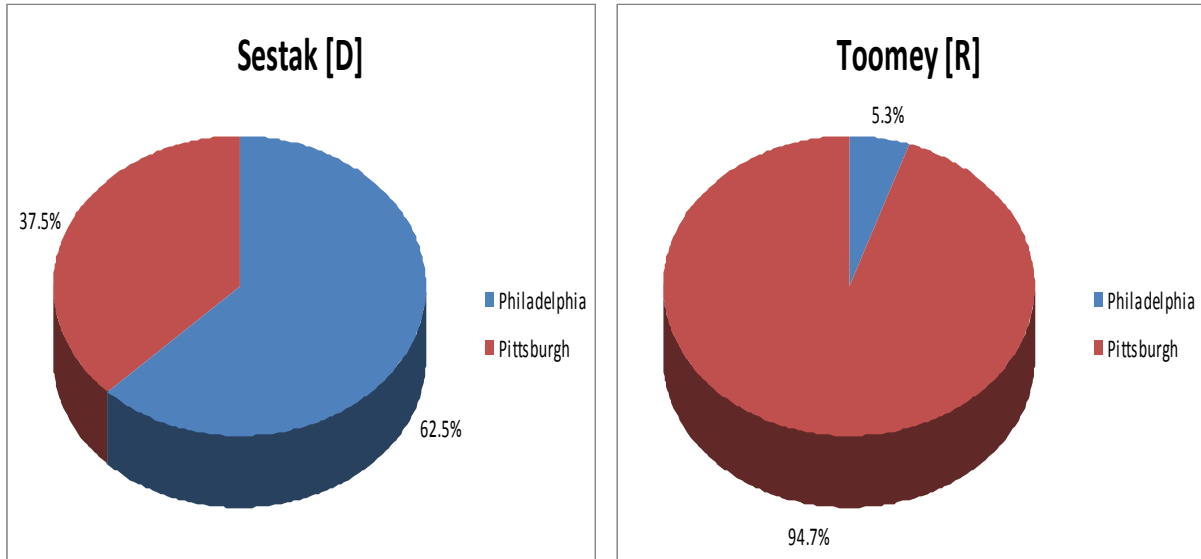


Source: 2010 The Nielsen Company

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 look at total TV exposure indicates a huge contrast for the campaigns. While 95% of Toomey's on-air mentions come from the Pittsburgh DMA, Sestak's mentions show a different story, with over 60% of his exposure coming from Philadelphia.

TOTAL ON-AIR MENTIONS, BY MARKET
September 26 to October 2

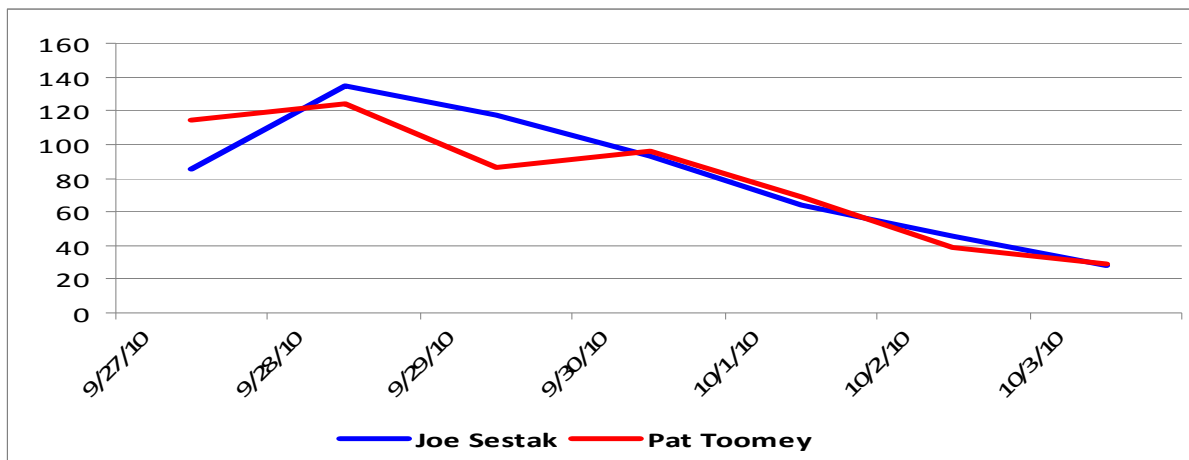


Source: The Nielsen Company 2010
Note: Percentages based on market share of closed-captioned mentions among 12 stations in the two Pennsylvania DMAs studied for this analysis

Online Buzz

While Sestak earned a lead in online buzz on 9/28 and 9/29, the candidates' share of national Internet conversation largely evened out while declining as last week came to an end.

TOTAL PENNSYLVANIA SENATE RACE BUZZ, 9/27 to 10/3/10



Source: NM Incite 2010

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**MEDIA ANALYSIS
OHIO GOVERNOR'S RACE
Ted Strickland (D) vs. John Kasich (R)
Week of September 27, 2010**

Summary

In his reelection bid, Democratic Governor Ted Strickland continued to outpace Republican challenger John Kasich on-air, both in television advertising and total television mentions. But, an endorsement from one of Ohio's biggest newspapers boosted Kasich's online buzz as the week ended.

TV Advertising

Both campaigns moderately boosted their advertising quantities last week, but Strickland continues to double Kasich across Ohio's three biggest media markets. The biggest discrepancy came in Cleveland, where Kasich's 136 ads were only 33% of Strickland's 415.

**Ohio Governor Race - TV Advertising Activity
9/27 to 10/3/10**

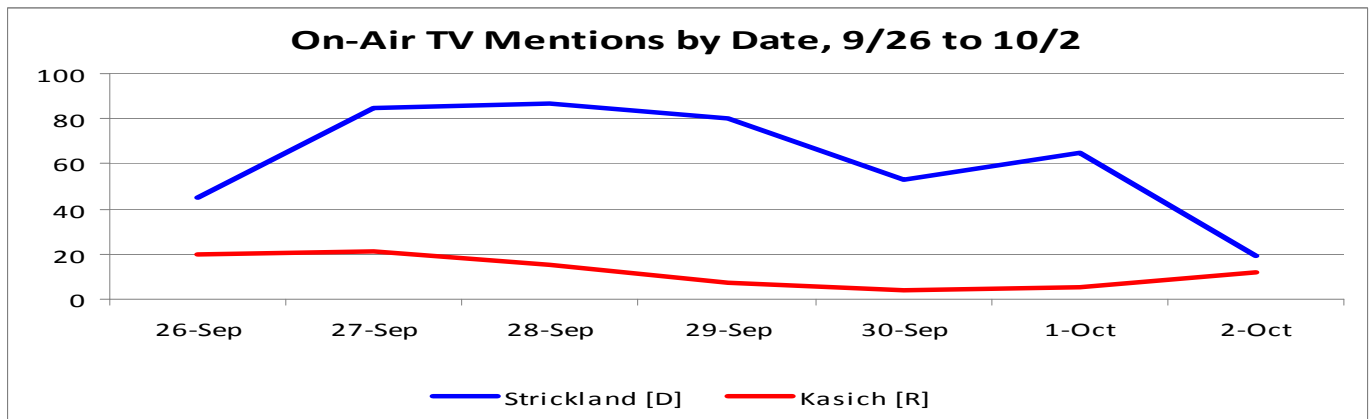
	Cincinnati	Cleveland	Columbus	TOTAL
Strickland	216	415	244	875
Kasich	175	136	99	410

Source: 2010 The Nielsen Company

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

TV Presence

Strickland's incumbency and his lead in the ad war gave him a steady and strong lead over Kasich in overall television exposure—an analysis of total TV mentions, whether paid or free, positive or negative.

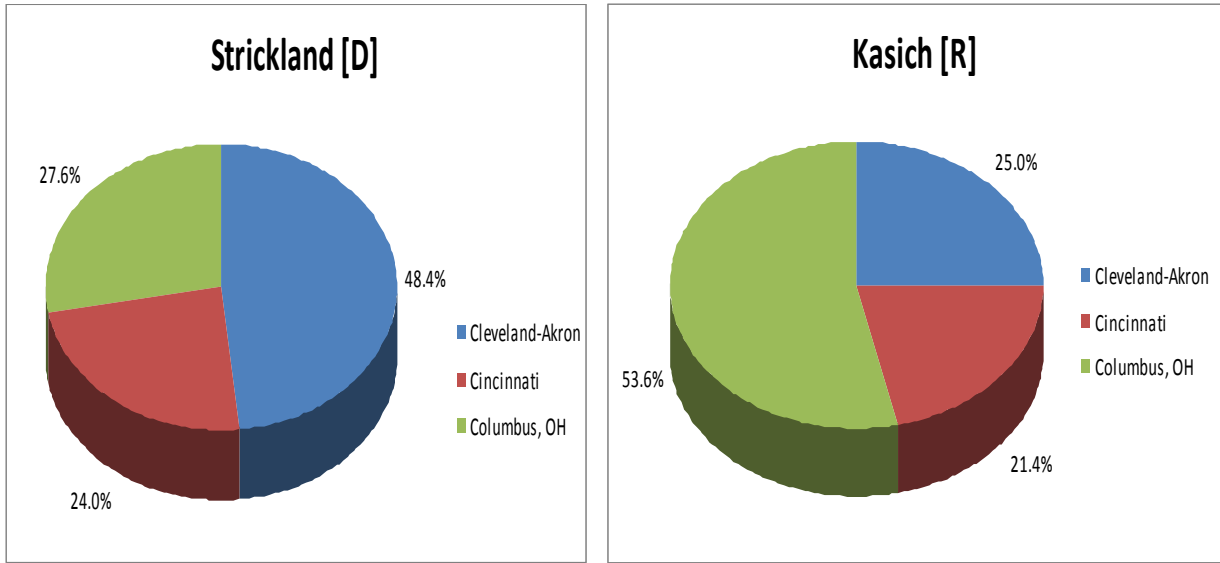


Source: 2010 The Nielsen Company

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

In a market-by-market analysis of on-air TV mentions, Strickland's advertising advantage in Cleveland is clearly visible. That DMA represented almost 50% of his total TV exposure last week, compared to 25% for Kasich. Kasich, meanwhile owes over half of his TV mentions to his home media market, Columbus.

TOTAL ON-AIR MENTIONS, BY MARKET
September 26 to October 2



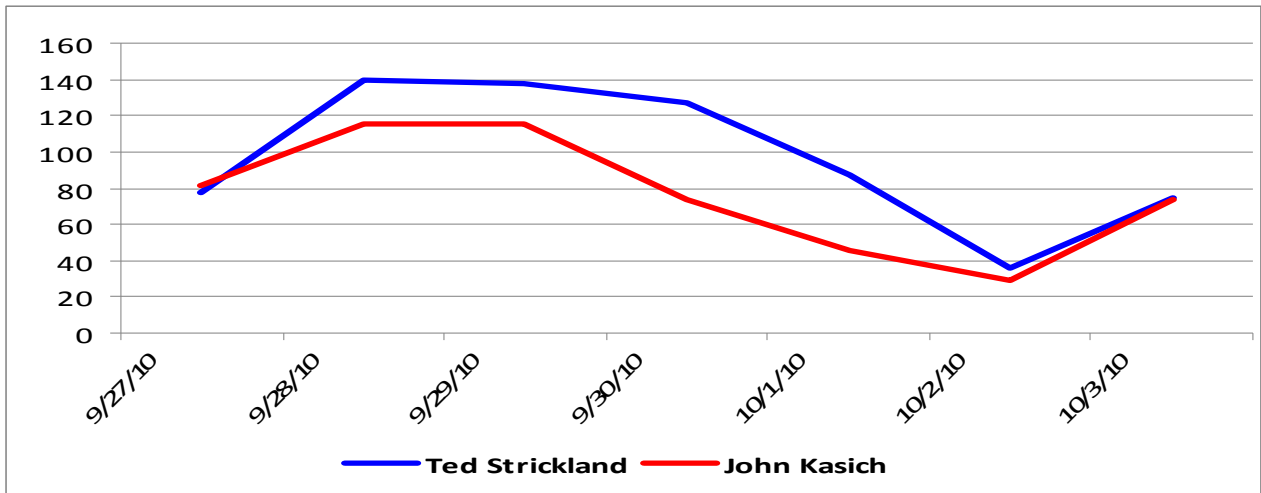
Source: The Nielsen Company 2010

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 study of national online buzz quantity gives Strickland a modest lead in Internet conversation share for most of last week. Kasich, however, did manage to close the gap on 10/3 as the online community reacted to him securing the endorsement of the Cleveland Plain Dealer.

TOTAL OHIO GOVERNOR RACE BUZZ, 9/27 to 10/3/10



Source: NM Incite 2010

For more details on Nielsen's campaign media insights, please contact Aaron Lewis at Aaron.Lewis@nielsen.com.



**MEDIA ANALYSIS
OHIO SENATE RACE
Lee Fisher (D) vs. Rob Portman (R)
Week of September 27, 2010**

Summary

Republican Rob Portman’s advertising advantage was the distinguishing feature last week of his US Senate campaign against Democrat Lee Fisher. His utter dominance on the air and his national profile are making things very tough for Fisher.

TV Advertising

It was a one-sided story in the advertising race last week, as the Fisher campaign only aired two ads in all of Ohio’s major media markets. Portman, on the other hand, maintained his steady course of spacing his 700+ ads across Cleveland, Columbus, and, to a slightly lesser degree, Cincinnati.

**Ohio Senate Race - TV Advertising Activity
9/27 to 10/3/10**

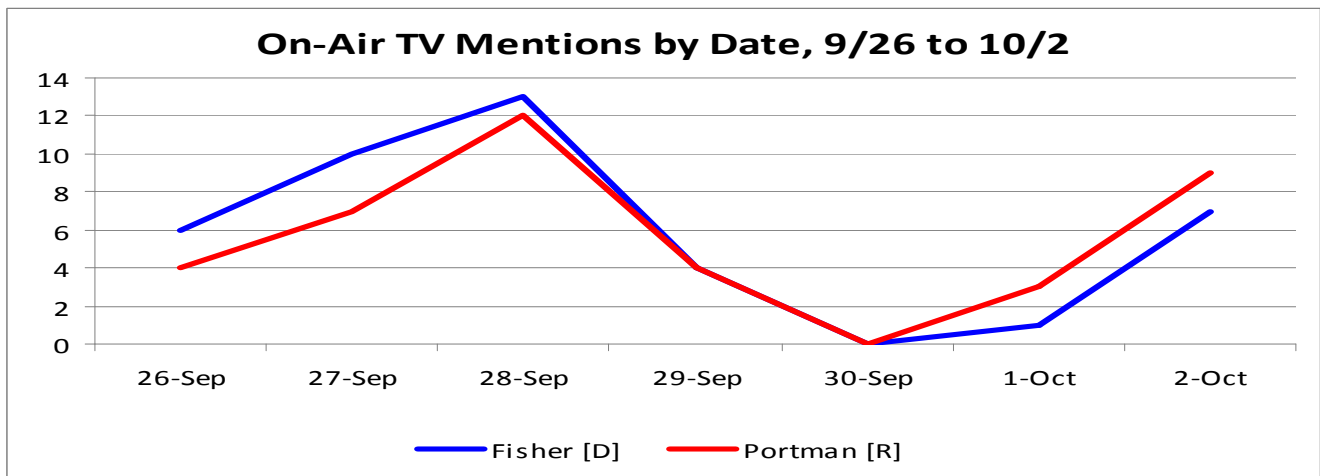
	Cincinnati	Cleveland	Columbus	TOTAL
Fisher	0	0	2	2
Portman	197	282	270	751

Source: 2010 The Nielsen Company

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

TV Presence

An analysis of total TV exposure, including both paid and free on-air mentions, Portman regains a small lead after Nielsen tracked no mentions of either candidate on 9/30.

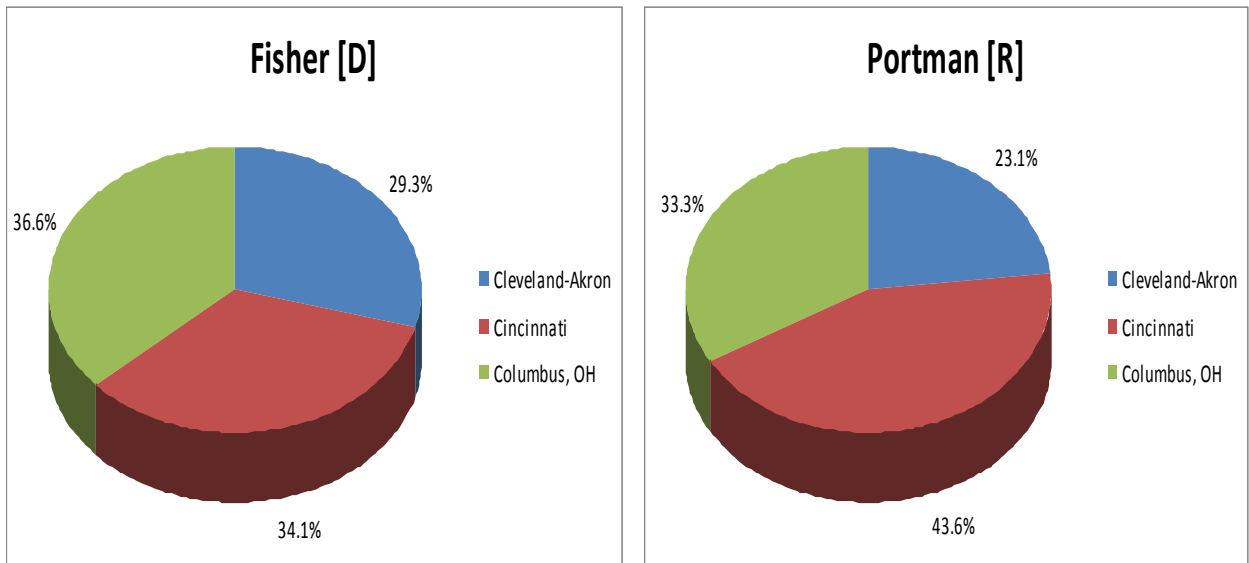


Source: 2010 The Nielsen Company

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

In a market-by-market analysis of on-air mentions, Portman relies on Cincinnati for a greater share of his exposure than Fisher. Fisher, meanwhile, gets his TV mentions in almost equal share from the three DMAs.

TOTAL ON-AIR MENTIONS, BY MARKET
September 26 to October 2

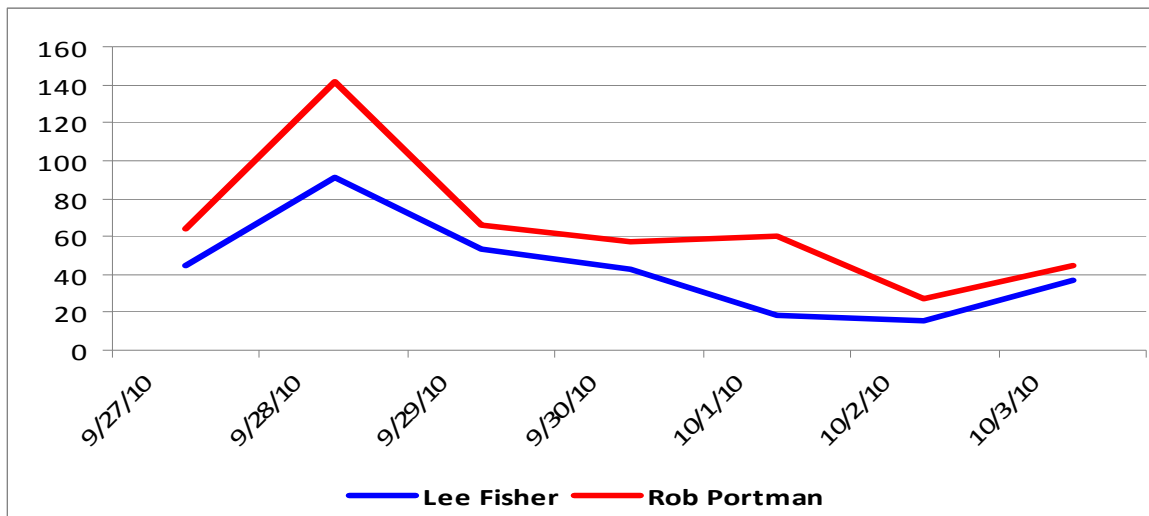


Source: The Nielsen Company 2010
Note: Totals based on the market share of all closed-captioned mentions of candidate names airing on 17 stations across Ohio's top three DMAs

Online Buzz

Portman rode into last week on the heels of two major editorial endorsements, and those reverberated in the online conversation as the week began. An analysis by NM Incite shows, however, that his lead in online buzz shrank as the week progressed.

TOTAL OHIO SENATE RACE BUZZ, 9/27 to 10/3/10



Source: NM Incite 2010

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