

The Media Audit

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Insights for Today's Changing Media and Consumer Marketplace

Election 2012:

Should Sports and Politics Mix?



The recent announcement that ESPN will sell a bigger portion of its ad time to political campaigns this fall begs the bigger question; do sports and politics go together? In

terms of reach, the argument could be made affirmative. According to findings in the recently released 2011 National Report, ESPN now ranks as the fourth highest reaching cable network in the U.S., with more than 49 million who tune in during a typical seven day period, and more than 26 million who tune in during a typical day. The seven day figure is slightly higher than the number that views CNN in a typical week. Furthermore, among those who have voted in a local, state, or national election in the past year, the cable network also ranks as the fourth highest reaching network. As a result, political advertisers would have the potential to reach nearly one-third of the U.S. population with a heavy blanketing of ads.

So who will political advertisers specifically target by placing ads on the popular sports network? According to the same study, 65.9% of ESPN's weekly viewers are male, with an above average household income of \$73,714. Analysis of ESPN viewer's political affiliation reveals that among viewers, 34.5% identify themselves as Democrat, while 25.1% identify themselves as Republican, and 33.8% identify themselves as Independent. Among viewers, 68.2% voted in a local, state, or national election in the past year; the figure is 10% higher when compared to the voting habits of the general U.S. population. Thus, one could predict that ESPN viewers will also be active in the coming general election.

Football fans, who will be potentially targeted by the political ads this fall, also bear resemblance to the ESPN viewer profile. The

same study reveals that among those who regularly follow professional football on TV, 55.5% are male, while 44.5% are female. Similarly, 58.6% of college football fans are male, while 41.4% are female.

While political affiliation does not necessarily translate to actual voting, the study reveals that among these sports enthusiasts, they are above average in voting activity. For example, voting activity for these sports fans is higher among Republican and Independent voters when compared to the general population. Among all adults, 16.4% have voted in an election in the past year and identify themselves as Republican. However, for ESPN viewers, 19.5% have voted in the past year and identify themselves as Republican. The figures are even greater for pro and college football fans (see chart below).

Similar activity can be seen with Independent voters. Among all U.S. adults, 18.7% voted in the past year and identify themselves as Independent. Among ESPN viewers, 20.8% have voted and are Independent, while 22.3% of college football fans have voted in the past year and identify themselves as Independent. Thus, college football fans are 20% more likely than the general population to have voted in the past year and also identify themselves as Independent.

	Percent of Audience who Voted in a Local, State or National Election Past Year AND...					
	Democrat		Republican		Independent	
Audience	Percent	Index	Percent	Index	Percent	Index
All Adults 18+	21.9	100	16.4	100	18.7	100
ESPN Viewers	23.1	105	19.5	119	20.8	111
Pro Football Fans*	23.7	108	19.8	121	21.2	114
College Football Fans*	23.4	107	22.1	135	22.3	120

*Regularly follow sport on TV. Source: The Media Audit 2011 National Report

Industry experts estimate that cable is winning more political ad dollars and is expected to draw about 14% of TV political ad spending this year. In 2008, cable received approximately 10%

In Brief

Automotive Trends:

Auto Website Visits Inch Higher



A new report from The Media Audit reveals that visits to automotive websites among U.S. consumers continues to inch higher.

According to the six year trend analysis, 22.4% of U.S.

consumers have

visited an automotive website regularly or occasionally in a typical month's period last year. The figure is up slightly from 2010, when 22% had done so. Furthermore, the figure has increased from 18.2% in 2006 and has risen each year since then. The findings bode well for the struggling automotive industry as a whole.

Among those consumers nationally who plan to buy a new or used vehicle in the next year, Craigslist reigns as the most visited with 17.3% of new or used auto buyers having regularly or occasionally visited the site in the past month.

Autotrader.com ranks second, with 9.2% of auto buyers having

visited the site, followed by Cars.com (5.5%), Carmax.com (3%) and Ebay.com (2.8%).

The same study reveals planned purchases for new or used vehicles had been in annual decline, dropping from a high of 18.3% who plan to buy in 2005 to 14.3% in 2010. However, in 2011, the data reveals a slight increase in planned vehicle purchases for the first time. The figure increased to 14.6, representing 21.6 million new and used automobile buyers. Among these buyers, 37.5% stated they intend to buy a new vehicle, while 19% stated they plan to buy a vehicle priced over \$30,000.

Among top markets for visits to Craigslist.org/autos is Eugene, Oregon, where 26.7% of the market's population has visited Craigslist.org for automobiles. The resulting figure is nearly three times higher when compared to the percent of the U.S. population who has visited Craigslist for automobiles. Spokane, Washington ranks second with 20.2% who have visited the site, followed by Boise, Idaho (19.8%), Grand Rapids, Michigan (17.3%) and Portland, Oregon (17.2%).

For more information, contact The Media Audit.

Lifestyle:

Five of Top Ten Cat Markets in Northwest



A new study on pet ownership reveals that five of the top ten markets for cat ownership are in the Northwest section of the country. According to the 81 market study, Eugene,

Oregon ranks as the

top market for cat ownership with nearly half the market (49.1%) who owns a cat. The figure is more than double when compared to the general U.S. population, in which 23.8% own a cat. The national figure represents more than 35 million people across The Media Audit's 81 measured markets who own a cat.

Rochester, New York ranks second with 38.2% of its local adult population who own a cat, followed by Southern New Hampshire (37.9%), Portland, Oregon (37.3%) and Spokane,

Washington (36.7%). The remaining top ten markets for cat ownership are Seattle-Tacoma, Washington, where 34.2% of the local population owns a cat, followed by Columbia-Jefferson City, Missouri (33.6%), Boise, Idaho (32.8%), Syracuse, New York (32.7%), and Akron, Ohio (32.5%).

It is estimated that nearly \$58 billion was spent by U.S. consumers on the pet industry in 2011, with advertising spending reaching historic heights in 2009 and 2010. The Media Audit Annual Consumer Buying Power provides valuable consumer intelligence that allows local media and media buyers to compare the amount spent annually on items such as pet food, pets, supplies, medicine, and pet services by different media audiences, thus allowing advertisers to identify which media can provide the best return on investment.

For more information on this study, or for more information on the Annual Consumer Buying Power Reports, contact The Media Audit.

Measuring the Market

Online Minute:

Pandora Leads the Internet Radio Pack



Internet radio company Pandora now reaches 11.3% of U.S. consumers in a typical week, more than any other streaming music service. The results are from a newly released National Report from The Media Audit. The figure

represents more than 16 million listeners 18 and over across 62 of The Media Audit's 81 measured markets.

Data from The Media Audit study also identifies key demographics in which Pandora listeners are different from the general population. According to the study, Pandora has a heavy concentration of affluent working women who listen. Among those who have listened to Pandora in the past 7 days, 14.6% are affluent working women. The term "affluent working women" is coined by The Media Audit and refers to those women who are employed and have a household income of greater than \$75,000 per year. Among all U.S. consumers, only 9.7% are considered "affluent working women", therefore Pandora listeners are 51% more likely to fall into this consumer segment.

Real Estate:

Las Vegas top Real Estate Market



Las Vegas, a market hit hard by the slumping economy, is the top market for planned home purchases, according to recently released report from The Media Audit. Among adults who live in Las Vegas, 14.8%

plan to buy a home in the next two years. The figure compares to 9.4% for the U.S. As a result, adults living in Las Vegas are 57% more likely than the general U.S. population to be planning a new home purchase.

Louisville, Kentucky ranks second in the national poll with 14.3% of the local population planning to purchase a new home in the next two years, and is tied with Tulsa, Oklahoma (14.3%). Following Tulsa is Riverside-San Bernardino, California, with

The popular streaming music service also indexes above average in reaching business owners as well as certain ethnic groups. Among Pandora's weekly audience, 6.7% are business owners, partners or corporate officers, compared to 5.4% for the general population, while 21.6% are proprietors or managers, compared to 15.6% for the general population. As a result, Pandora listeners are 23% more likely than the general population to be a business owner, partner or corporate officer and 38% more likely to be a proprietor or manager.

The study also found that Pandora listeners index above the market average in reaching African American, Hispanic, and Asian audiences. According to the same study, 13.5% of Pandora's listeners are African American (indexing at 9% more likely to be African American compared to the general population), while 21.7% who listen are Hispanic (23% more likely), and 8.9% are Asian (36% more likely).

Among those markets where Pandora is measured, Charleston, South Carolina ranks as the number one local market for listening with 27.9% of the market who reported having listened to Pandora online, followed by Albuquerque (26.9%), Spokane (26.8%), Allentown-Bethlehem (25.7%) and Madison (25.4%).

13.8% planning to buy a new home in the next two years. The market is tied with Reno, Nevada (also 13.8%).

Planned home purchases continue to decline nationally. According to the same study, 9.4% of U.S. consumers are planning the purchase of a home in the next two years. In the past six years, the figure has consistently declined from a high of 15.2% in 2005. However, some markets are doing better than others with regard to rebounding from the real estate declines.

Among other top markets for planned home purchases is Austin, Texas, where 13.4% plan to buy a home in the next two years, followed by New Orleans, Louisiana (12.5%), Houston, Texas (also 12.5%), Dallas-Ft. Worth, Texas (12.3%) and Norfolk-Virginia Beach-Newport News, Virginia (12.1%).

For more information on this report, or for more information on the newly released 2011 National Report, contact The Media Audit.

Facts 'n Stats

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of political ad spending. One of the benefits of cable advertising is its ability to target geographically, something not all media can offer. As a result, political advertisers may find cable an attractive medium in identifying and reaching out to different demographic groups that may share similar political ideologies.

The study also identifies other top-reaching cable networks when it comes to active voters. The Discovery Channel ranks highest among measured networks, reaching 43.2% of all adults who have voted in the past year. As a result, the network reaches more than 36 million active voters within The Media Audit's 81 measured markets. Fox News Channel ranks second in reaching active voters, with 40.2% who have viewed the network within the past week. Among the remaining top five cable networks for reaching active voters is The Weather Channel (37.1% reach), followed by ESPN (36.6%), and CNN (35%). The figures represent the total percent of voters who

viewed each network in a typical week.

The Media Audit provides qualitative ratings and audience profiles for more than forty cable channels across 81 measured markets. In addition to past 7 day viewing and viewed yesterday, the data enables users to ascertain whether the viewer is viewing via local cable or satellite connection.

Surveys were conducted in 81 U.S. cities among more than 104,000 respondents.

For more information on The Media Audit's newly released 2011 National Report, or for more information on political insights offered in The Media Audit local market reports, contact The Media Audit.

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10333 Richmond Avenue
Suite 200
Houston, TX 77042
800.324.9921

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