



# October 26, 2011

## Anzalone Liszt Research

### National Polling Summary

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Friends,

Below you will find the weekly Anzalone Liszt Research National Polling Summary, which provides a pollster's take on data and trends that affect political campaigns.

This week we take a look at how TV viewership has shifted away from the traditional model (people watching the big four network shows live), where those eyeballs have gone, and how campaigns have started to react.

Following our analysis are additional news items and data we thought you'd enjoy.

John Anzalone and Jeff Liszt

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#### **STORY THIS WEEK: Americans Leaving Live Broadcast TV--Can Campaigns Adapt?**

Broadcast television stations still remain the gold standard for paid voter communication efforts--there is still no way to reach so many people so quickly--but the advertising world is becoming fractured and splintered, and it will force political campaigners to keep adapting our voter contact strategies. Some of the trends we've seen in the last few years:

#### **Viewership of the Big Four Networks is Declining**

This is a long-term trend, much older than widespread digital media consumption. Network TV viewership has dropped steadily for decades--Pew was reporting on TV news' decline [in 1996](#), for example. This trend is ongoing; last TV season, the big four networks were [down](#) anywhere from 5.8% (Fox) to 15.5% (NBC) from the previous season. NBC has as recently as two years ago set [historic lows](#) in the [raw](#) number of weekly viewers it has--despite the fact that Nielsen started precisely measuring viewership in 1987, when there were about 20% fewer Americans (and TV watchers) than there are today.

For campaigns, this means they can no longer expect to reach every one of its voters by placing a network TV buy and forgetting about it. Traditionally, high-budget statewide campaigns (Governor, Senator, etc.) have spent more than half of their [total](#) campaign budget on network TV ads: more than other media, staff salaries, polling, and everything else combined. Clearly this shift has serious implications for political campaigns.

#### **Much of that Audience has Moved to Cable**

As has been [well documented](#), cable TV has grown substantially in the last 20-30 years. It has also started producing [more original content](#)--67% of cable's shows were produced for cable in 2008, compared to 59% in 2003--and the highest rated cable-only shows last week were not *that* far behind their network counterparts:

Top Broadcast Shows, week of [Oct 16](#):

Show	# of Viewers (millions)
NCIS	18.9
Dancing With The Stars	16.9
Sunday Night Football	16.6

Top Cable Shows, week of [Oct 16](#):

Show	# of Viewers (millions)
Monday Night Football	16.4
Walking Dead	7.3
Jersey Shore	6.4

While each cable program's viewership is lower than broadcast levels (Walking Dead would not have made the top 25 in broadcast viewership), the gap is closing. Political advertising has adapted to this trend-a couple decades ago very few consultants considered cable a serious campaign advertising venue, but now a cable buy is included in virtually all campaigns' budgets that buy TV time. It's no wonder cable advertising rates have seen a [double-digit price jump](#) in the last year as corporate advertisers have made the same decision.

### **Commercial-Skipping DVRs, Video On Demand are Mainstream and Growing**

Technology is threatening traditional TV advertising strategies beyond just the broadcast/cable mix that campaigns are currently using. The most immediate threat: a sizable percentage of Americans now use a DVR to record live TV shows and watch them later (often while fast-forwarding the commercials). Additionally, most TV owners use a video on demand (VOD) service like Comcast's On Demand. [Comcast finds](#) 62% of Americans have used VOD and 60% own a DVR, while a similar survey from the [Leichtman Research Group](#) last year found that 40% of households had a DVR last year (up from 32% in 2005) and 52% watched VOD in the last month. Other interesting facts about DVR and VOD:

- VOD and DVR users skew male, younger, white, and above-average income. For example:
  - Adults 25-49 watch more than 13 hours of VOD + DVR per week, compared with 7 and a half hours for adults 65 and older. This is despite those older voters watching about 60 hours of extra TV per week than their younger counterparts
  - Hispanics (6:27 per month), Asians (8:08 per week) and African-Americans (7:44 per month) all watch much less time-shifted TV than whites (11:35 per month)
- Entourage, a show that has an audience that skews to the DVR owning population, averages 1.78 million live viewers a week, 1.87 million DVR views a week, 1.66 million on-demand viewings, and 2.3 million viewings during the week after each episode's initial airing.

To be clear, Video On Demand and DVR aren't a substantial share of the TV-viewing market today on a per-hour basis-most people who have these technology continue to watch a lot of live TV. The same Leichtman Research Group study finds DVR and VOD combined for less than 10% of total TV viewing time in 2010, and [Nielsen finds](#) that the average TV viewer watched about 10 hours of time-shifted TV (DVR + VOD) in the spring of 2011, about 7% of the time the average American spent watching TV. However, political campaigns ignore these technologies at their own peril-Nielsen has seen more than a 30% increase in DVR/VOD access and usage in the last three years.

### **The Internet: Not Just a Fad Anymore**

For those of you still receiving our weekly newsletter via Pony Express or telegram, we are here to confidently inform you that the internet is here to stay and growing. People are also watching a lot of video online: As of last year, [53% of all Internet traffic](#) by volume was video uploads and downloads. Nielsen reports that 143 million Americans watched video on the Internet in the second quarter of 2011, up 19% from three years earlier. [ComScore finds](#) even higher viewership, with 182 million users watching an average of 19.5 hours per person (for a total of 39.8 billion video views). Nielsen also found 30 million people watched video on a mobile phone in the second quarter of 2011 (up 200% from 2008).

Again, total internet viewing time is low compared to TV: the average viewer only watched 4 hours and 26 minutes a month, roughly the TV an average American watches in one day. However, online video watching is

growing rapidly and is up from 2 hours 12 minutes in 2008.

Demographically, the Internet video group is different than the VOD + DVR group:

- Whites watch the least online video (3:50 per month), compared to Hispanics (6:15), African-Americans (5:58) and Asians (8:08). They also watch less video on a mobile phone per month than these two groups.
- While peak usage for VOD + DVR occurs among 35-49 year olds, peak usage for Internet video and cellphones occurs in the 18-24 year old age group

Like with cable viewership, we have seen [good campaigns](#) respond to this trend. Most campaigns are at the very least posting their TV ads on YouTube (and linking to them on Facebook and their websites), and many are creating web-only ads for fundraising and voter persuasion; the DNC, among other groups, has bought ad time on Hulu (which reported [800 million](#) monthly ad streams last November)

### **Univision Booms, Defies Broadcast Trend**

The one broadcast sector that has seen rapid growth recently is Spanish-language TV. During the week of October 10-16 Univision was [in fifth place](#) among 18-49 year olds with 3.24 million viewers for an average show (compared with 4<sup>th</sup>-place NBC at 6.24 million). This is not that far behind, though, and Univision was [second](#) in the 18-34 year old demographic, behind Fox but ahead of ABC, CBS, and NBC.

According to the above-linked Univision press release, Univision beat at least one of the big four networks among 18-34 year olds on every night of the week. Univision viewership also [went up](#) 6.2% between the 2010 and 2009 TV seasons while the big four networks all declined. A couple other key facts about Spanish language TV:

- Telemundo [also registered](#) double-digit growth in Q3 2011 and is the fastest growing network year over year
- Univision and Telemundo do not follow the typical Fall-Spring TV schedule and doesn't see the summer viewer drop-off. Spanish-language TV therefore becomes a more attractive option for summer advertising, something very common in political campaigns.
- Spanish-language media is heavily watched by English-speaking Hispanics. It's [not the only way](#) to reach Hispanics, but only 37% of Hispanics say they don't watch Spanish-language programming. [Pew finds](#) a 47% plurality of Hispanics get their news from both English and Spanish TV (compared to 27% who watch only English newscasts and 26% who watch only Spanish newscasts).

### **OTHER NEWS FROM THE POLLING AND POLITICAL WORLD**

**Ohioans will likely repeal anti-union law:** Ohioans, who will get a chance to repeal Gov. Kasich's anti-worker legislation SB5 in two weeks, [support its repeal](#) by a wide margin (57% repeal / 32% retain). Voters have also soured on the job Kasich is doing (36% approve / 52% disapprove). The least popular part of the anti-worker bill for Ohioans: a ban on public employee strikes (32% support / 61% oppose).

**Americans want to end the Electoral College:** Voters support [ending](#) the Electoral College and electing Presidents by popular vote (62% popular vote / 32% keep Electoral College). In related news, in the last five years states holding a combined 132 electoral votes have [passed laws](#) to de facto end the Electoral College. If this number reaches a combined 270 electoral votes it would go into effect, meaning presidents would be elected in effect by popular vote.

**Republicans don't like "9-9-9", do like flat tax:** Republicans [are unfavorable](#) to Herman Cain's 9-9-9 plan (41% favorable / 50% unfavorable), although they are less opposed to it than voters overall (36% favorable / 56% unfavorable). We would caution that voters are likely very uninformed on the specifics and effects of this plan, so this support level is highly susceptible to question wording and will likely prove volatile over time.

**I-Bankers: on the bright side, Americans think you are smart:** A [CNN poll](#) found that a majority of Americans think Wall Street bankers and brokers are greedy (80% say it applies), overpaid (77%), and dishonest (65%, up from 51% in 1994). 74% think they are not community minded (up from 60% in 1994), while 82% think they are intelligent (down from 89% in 1994). The group that trusts Wall Street bankers the most in the poll? Tea Party supporters (50% say Wall Street bankers and brokers are not dishonest).

**Missed a past newsletter?** They can be found on our website, [here](#).

## **PUBLIC POLLING**

<b>PRESIDENT OBAMA'S JOB RATING</b>				
<b>Polling Firm</b>	<b>Date</b>	<b>Sample</b>	<b>Approve</b>	<b>Disapprove</b>
CBS News/NY Times	10/19-24/11	Adults	46%	46%
AP-GfK	10/13-17/11	Adults	46%	52%
CNN/ORC	10/14-16/11	Adults	46%	50%
Time	10/9-10/11	Adults	44%	50%
Ipsos/Reuters	10/6-10/11	Adults	47%	50%
NBC/Wall Street Journal	10/6-10/11	Adults	44%	51%

<b>PARTY SELF ID</b>					
<b>Polling Firm</b>	<b>Date</b>	<b>Sample</b>	<b>Dem</b>	<b>Rep</b>	<b>Ind / other</b>
Pollster.com Trend	10/26/11	Adults	30.8%	22.7%	43.6%

<b>GOP NATIONWIDE PRIMARY</b>		
<b>Polling Firm</b>	<b>Date</b>	<b>Sample</b>
CBS News/New York Times	10/19-24/11	Republicans Primary Voters
Cain	25%	
Romney	21%	
Gingrich	10%	
Paul	8%	
Perry	6%	
Bachmann	2%	
Huntsman	1%	
Santorum	1%	

<b>GOP CAUCUSES AND PRIMARIES</b>			
	<b>Iowa</b>	<b>New Hampshire</b>	<b>South Carolina</b>
<b>Polling Firm</b>	University of Iowa	NBC News/Marist	NBC News/Marist
<b>Date</b>	10/12-19/2011	10/3-5/11	10/11-13/11
<b>Sample</b>	Likely GOP Caucus-goers	Likely GOP Primary Voters	Likely GOP Primary Voters
Cain	37%	13%	31%
Romney	27%	45%	28%
Paul	12%	13%	5%

Gingrich	8%	4%	7%
Perry	6%	7%	10%
Bachmann	4%	3%	5%
Santorum	3%	1%	2%
Huntsman	1%	5%	1%

### DIRECTION OF THE COUNTRY

Polling Firm	Date	Sample	Right Direction	Wrong Track
CBS News/NY Times	10/19-24/11	Adults	21%	74%
AP-GfK	10/13-17/11	Adults	24%	72%
Time	10/9-10/11	Adults	14%	81%
NBC/Wall Street Journal	10/6-10/11	Adults	17%	74%
Reuters/Ipsos	10/6-10/11	Adults	21%	74%

### GENERIC HOUSE BALLOT

Polling Firm	Date	Sample	Dem	Rep	Unsure
Democracy Corps	10/15-18/11	Likely Voters	46%	46%	7%
Reuters/Ipsos	10/6-10/11	Registered Voters	48%	40%	8%

### OBAMA POPULAR VOTE SHARE

Polling Firm	Date	Polly Vote	Polls	Iowa Electronic Markets	Econometric Models	Index Models
PollyVote	10/26/11	50.6%	49.0%	48.5%	50.2%	54.5%



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