

2020 media and advertising overview


An overview of media coverage, advertising trends, and social media usage of the 2020 presidential candidates

February 7, 2020

Producer

Yanelle Cruz Bonilla

Roadmap

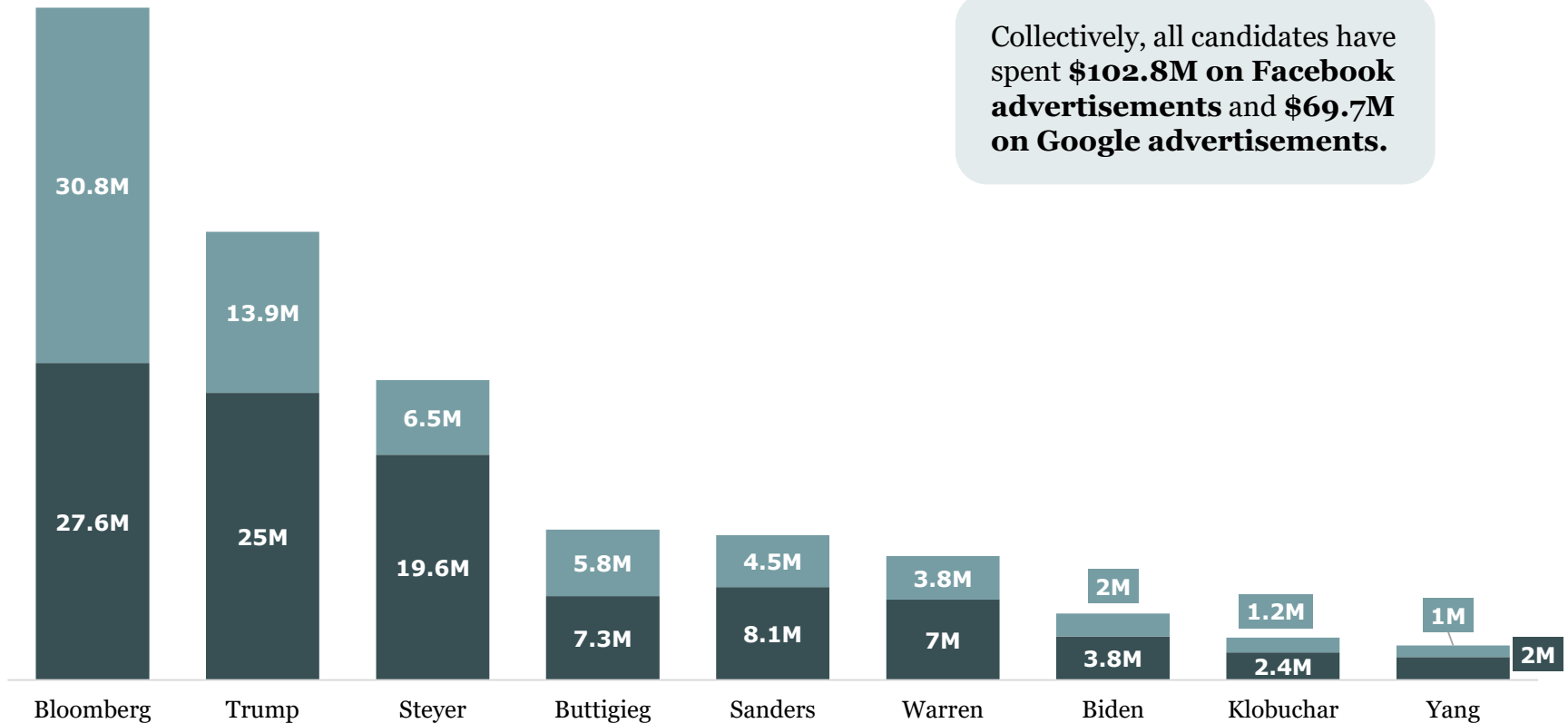
- 
- Advertising targeting and spending
 - Early primary states spending overview
 - Cable news and print media trends
 - Social media trends

Former New York City Mayor Bloomberg has outspent all other Democratic candidates in digital advertising expenses

Advertising spending between Jan. 5, 2019 and Feb. 1, 2020

OF TOP SPENDING 2020 CANDIDATES

■ Facebook advertisements ■ Google advertisements



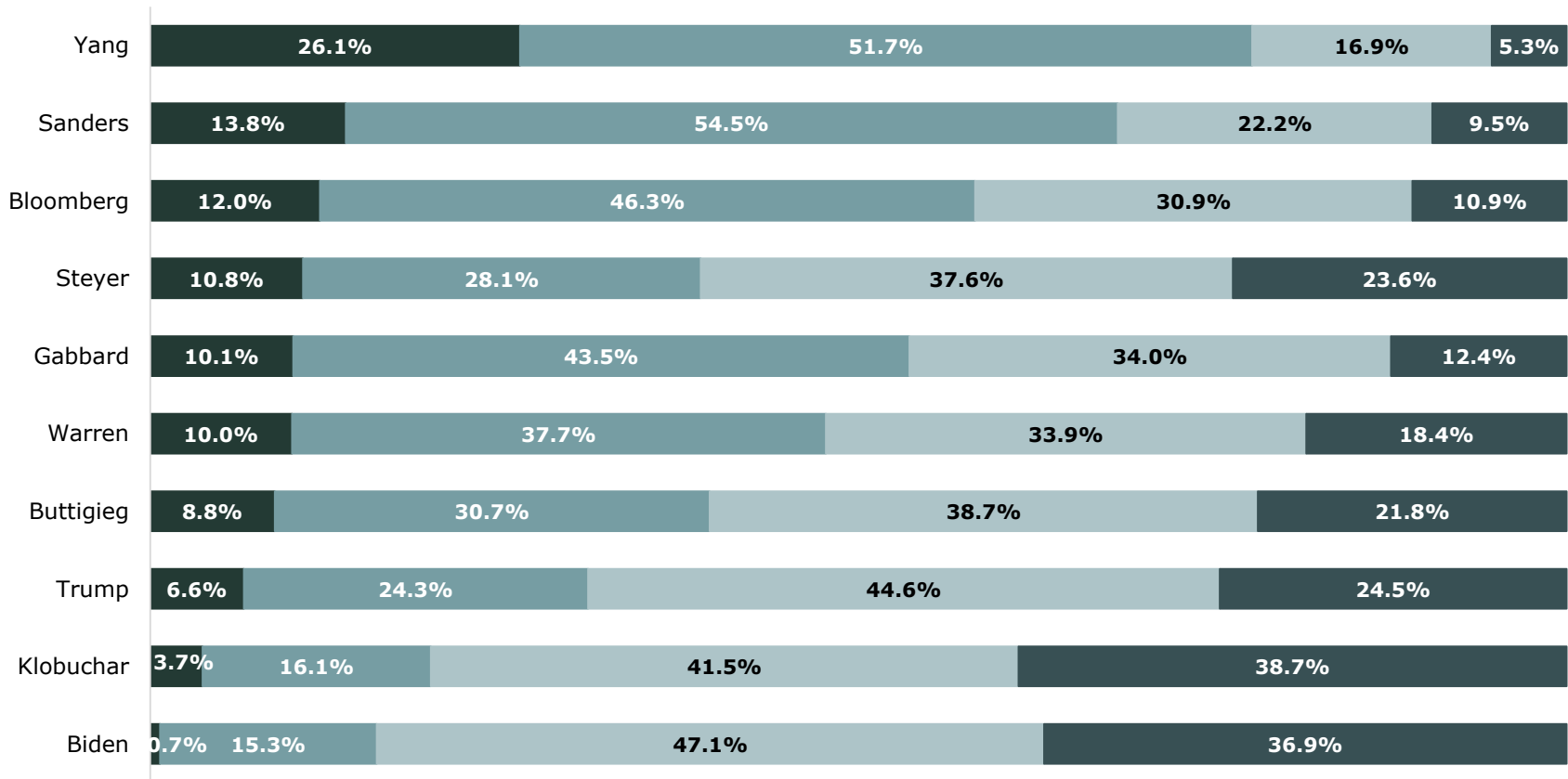
Sources: Bully Pulpit Interactive.

Sen. Sanders and Andrew Yang target younger voters, while former VP Biden and Sen. Klobuchar focus on older voters

Targeted spending on Facebook ads between March 23, 2020 and Feb. 1, 2020

OF TOP SPENDING 2020 CANDIDATES

■ 13 to 24 ■ 25 to 44 ■ 45 to 64 ■ 65+



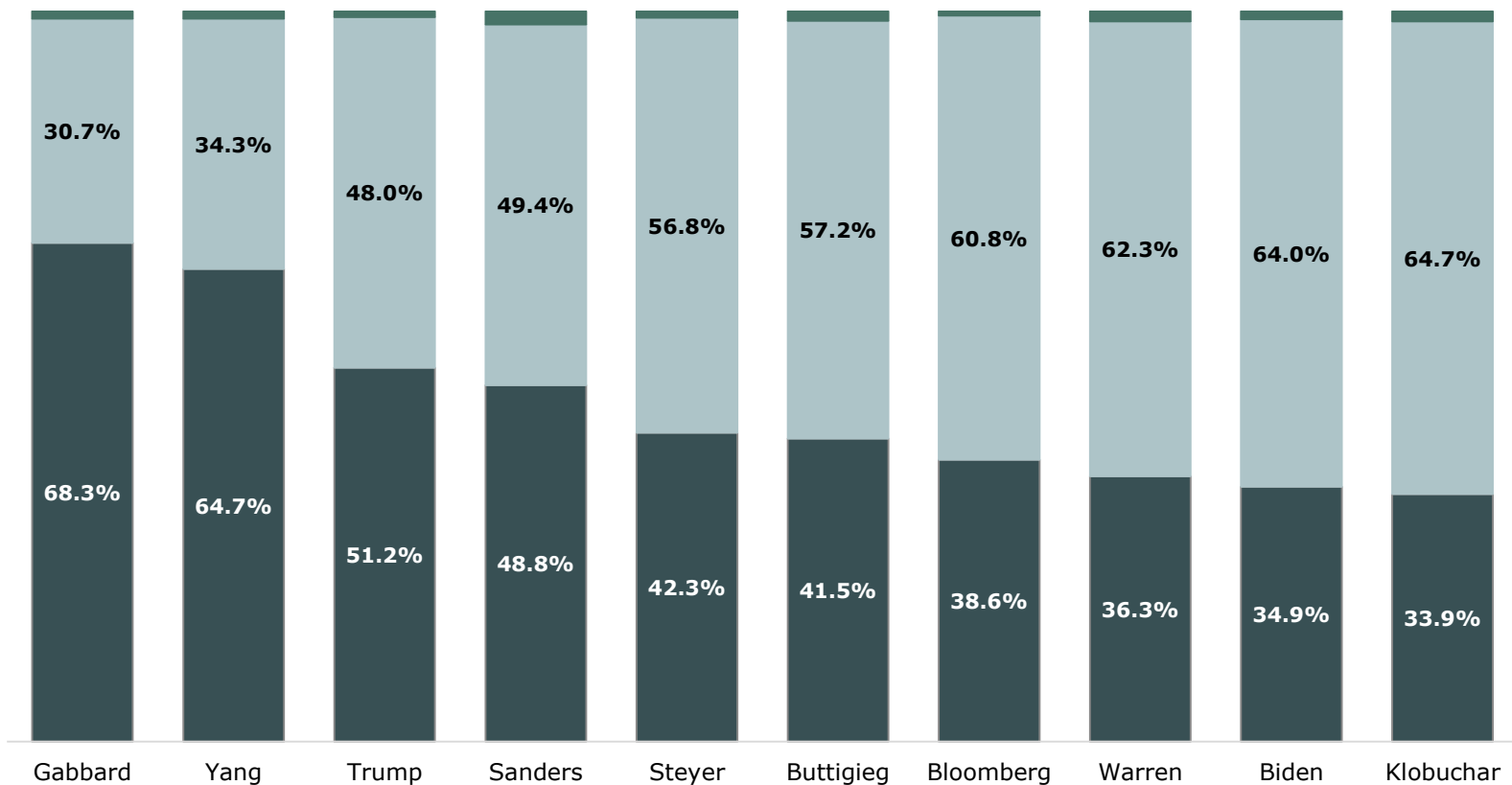
Sources: Bully Pulpit Interactive.

Rep. Gabbard and Andrew Yang are the two candidates that target males over females in ads

Targeted spending on Facebook ads between March 23, 2019 and Feb. 1, 2020

OF TOP SPENDING 2020 CANDIDATES

■ Male ■ Female ■ Unknown

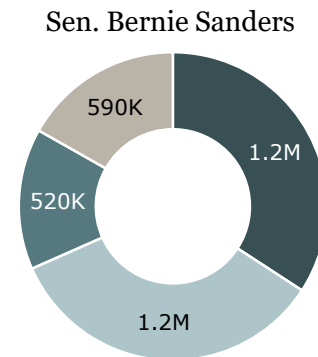
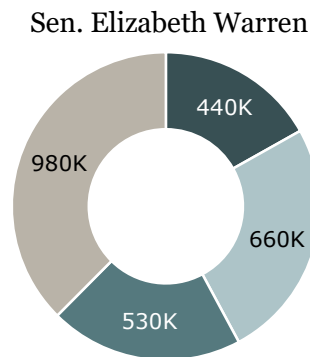
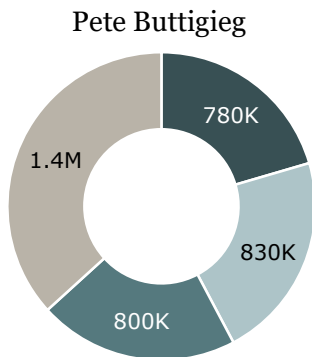
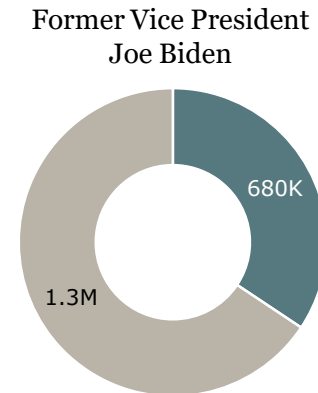
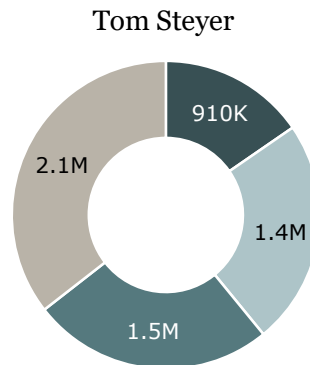
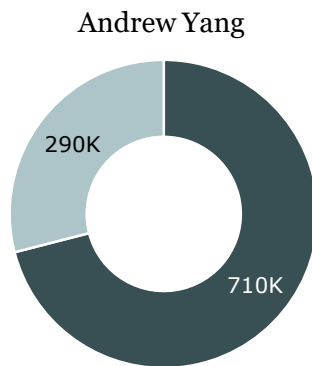


Sources: Bully Pulpit Interactive.

Andrew Yang has targeted young male voters in ads, while former VP Joe Biden is mostly targeting older female voters

Facebook ads targeted spending by age and gender, between March 24 and Oct. 5

■ Men 13 to 44 ■ Women 13 to 44 ■ Men 45+ ■ Women 45+

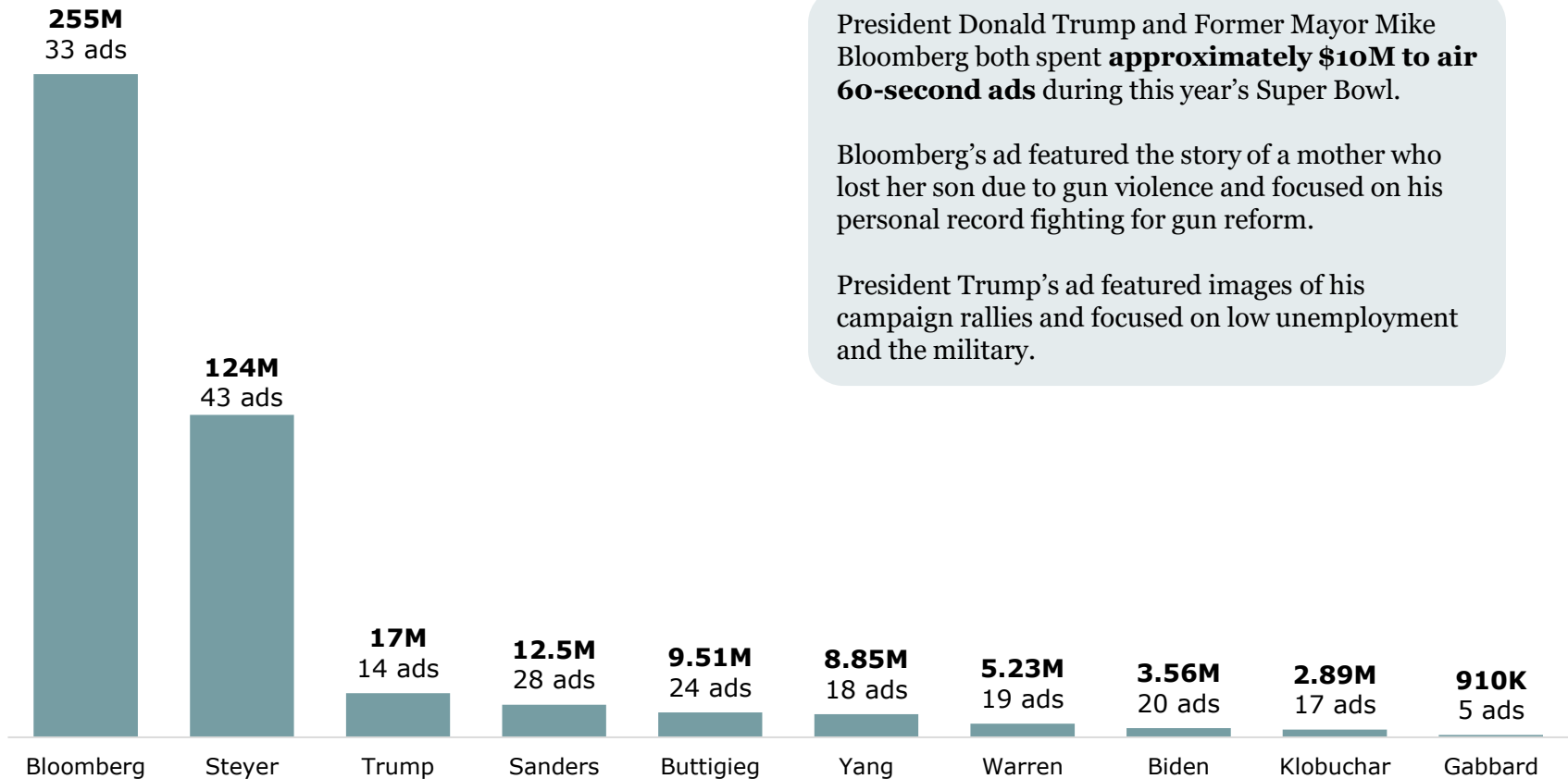


*Figures were not available for all categories for some candidates.

Source: The New York Times


Businessman Steyer and former Mayor Bloomberg are outspending all presidential candidates in television advertisements

Television advertisements spending, by candidate



Source: FiveThirtyEight, The New York Times.

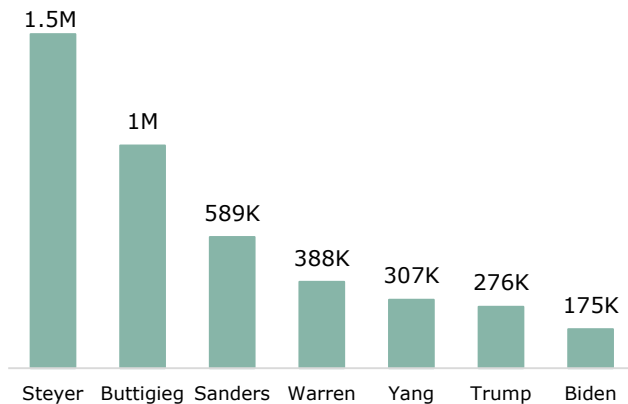
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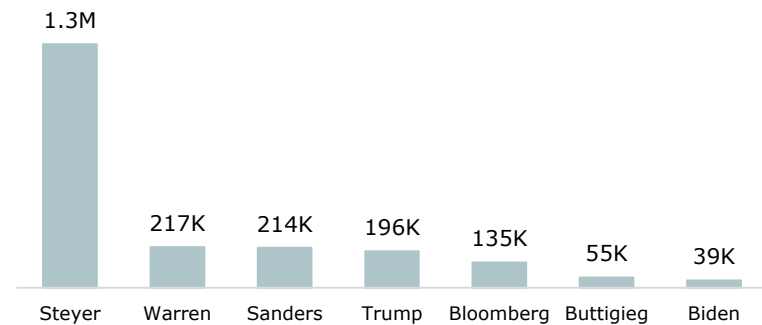
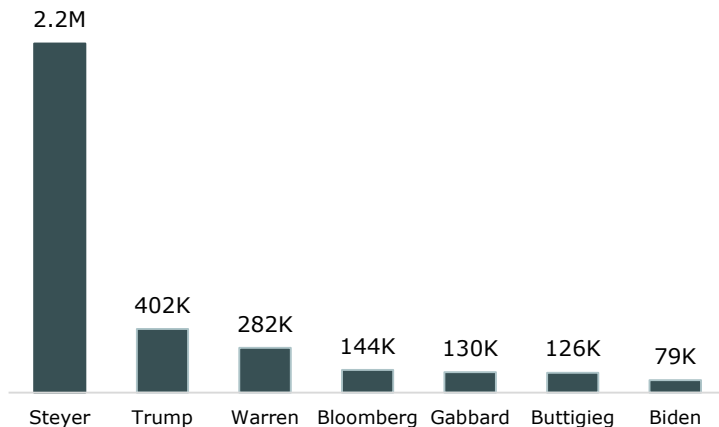
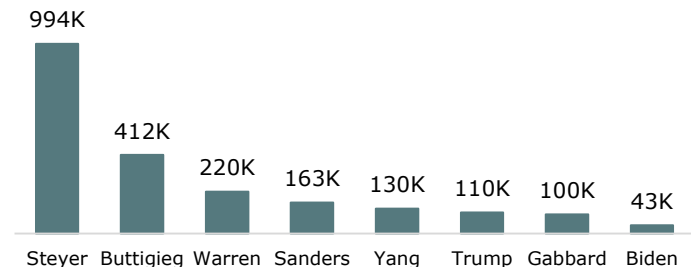
Businessman Tom Steyer leads advertising spending targeted at the first four voting states

Ads spending from Jan. 5, 2019 to Feb. 1, 2020, by candidate

Iowa New Hampshire South Carolina Nevada



In contrast, President Trump's highest spending has targeted four swing states: Michigan, Pennsylvania, Wisconsin, and Florida.

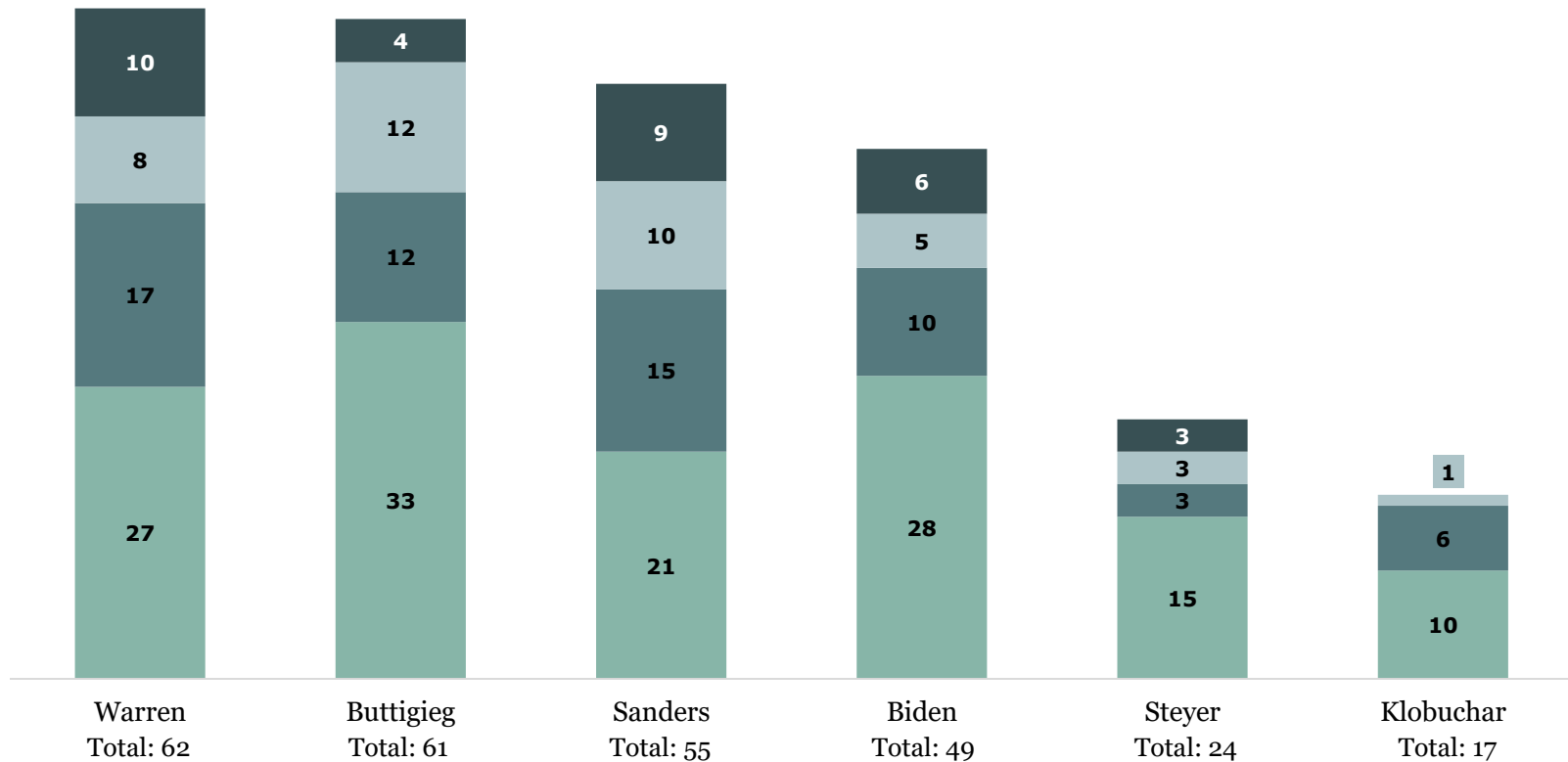


Source: The New York Times, Bully Pulpit Interactive

Senator Warren has the highest number of field offices in all four early primary states

Early primary states field offices as of Feb. 6, 2020, by candidate

Iowa New Hampshire South Carolina Nevada



Sources: CNN, New York Times, WMUR, Nevada Current, The Nevada Independent, Warren 2020, Biden 2020, Bernie 2020, Steyer 2020, FiveThirtyEight.

Andrew Yang spent the most days in Iowa, while former VP Biden has the highest number of field offices in the state

Former Vice President Joe Biden

58 days spent in Iowa	22% Iowa polling average
27 campaign offices in Iowa	27% National polling average
\$4.9 million spent on TV ads	

Senator Bernie Sanders

58 days spent in Iowa	22% Iowa polling average
21 campaign offices in Iowa	24% National polling average
\$10.1 million spent on TV ads	

Senator Elizabeth Warren

56 days spent in Iowa	15% Iowa polling average
26 campaign offices in Iowa	14% National polling average
\$6.14 million spent on TV ads	

Former Mayor Pete Buttigieg

62 days spent in Iowa	18% Iowa polling average
22 campaign offices in Iowa	7% National polling average
\$9.99 million spent on TV ads	

Senator Amy Klobuchar

67 days spent in Iowa	8% Iowa polling average
20 campaign offices in Iowa	5% National polling average
\$3.74 million spent on TV ads	


Tom Steyer

47 days spent in Iowa	3% Iowa polling average
15 campaign offices in Iowa	2% National polling average
\$14.27 million spent on TV ads	

Andrew Yang

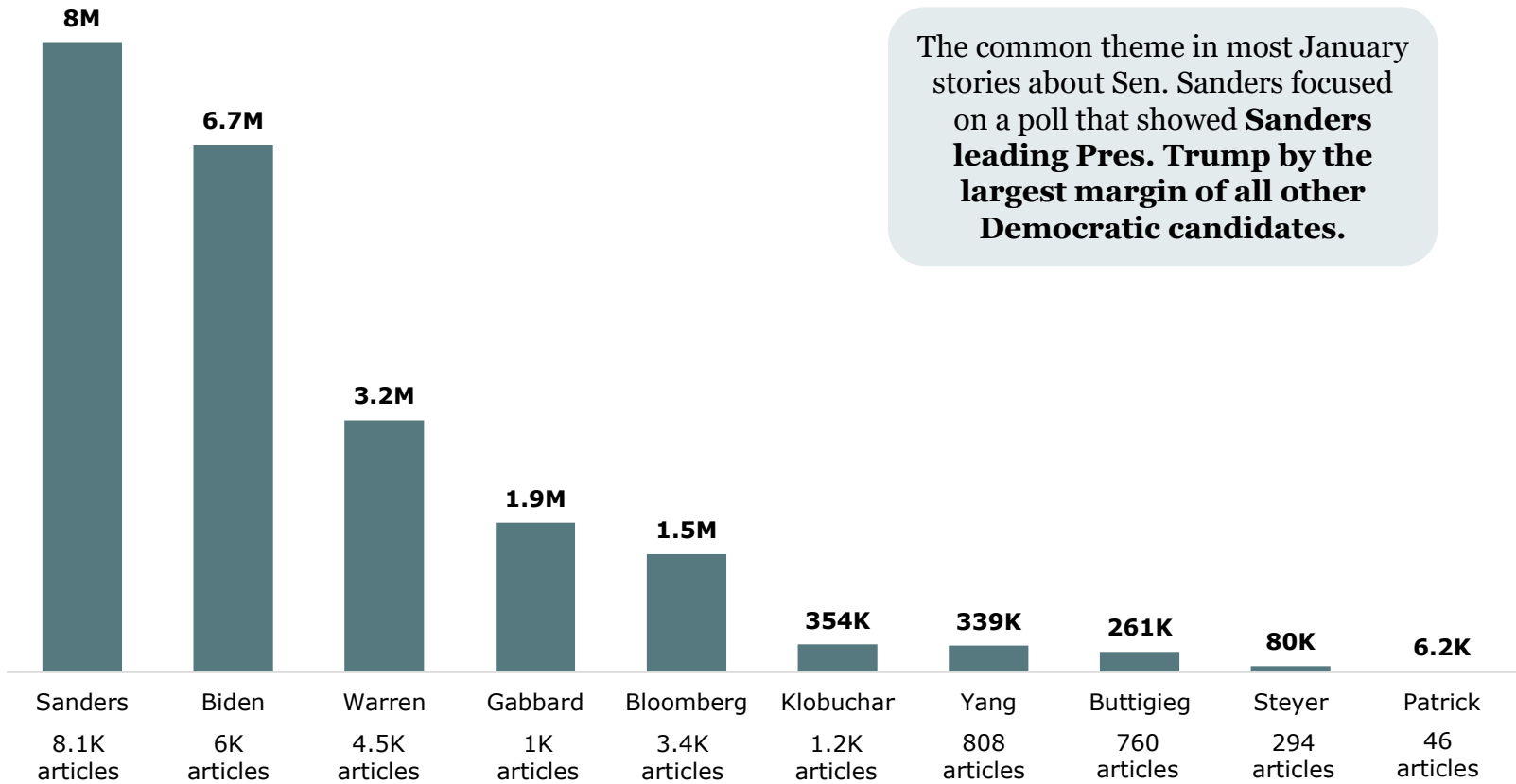
71 days spent in Iowa	3% Iowa polling average
Nearly two dozen campaign offices in Iowa	4% National polling average
\$6.52 million spent on TV ads	

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Sen. Sanders has received the highest number of interactions over the last three weeks

Total Facebook and Twitter interactions for week ending on Jan. 26, 2020

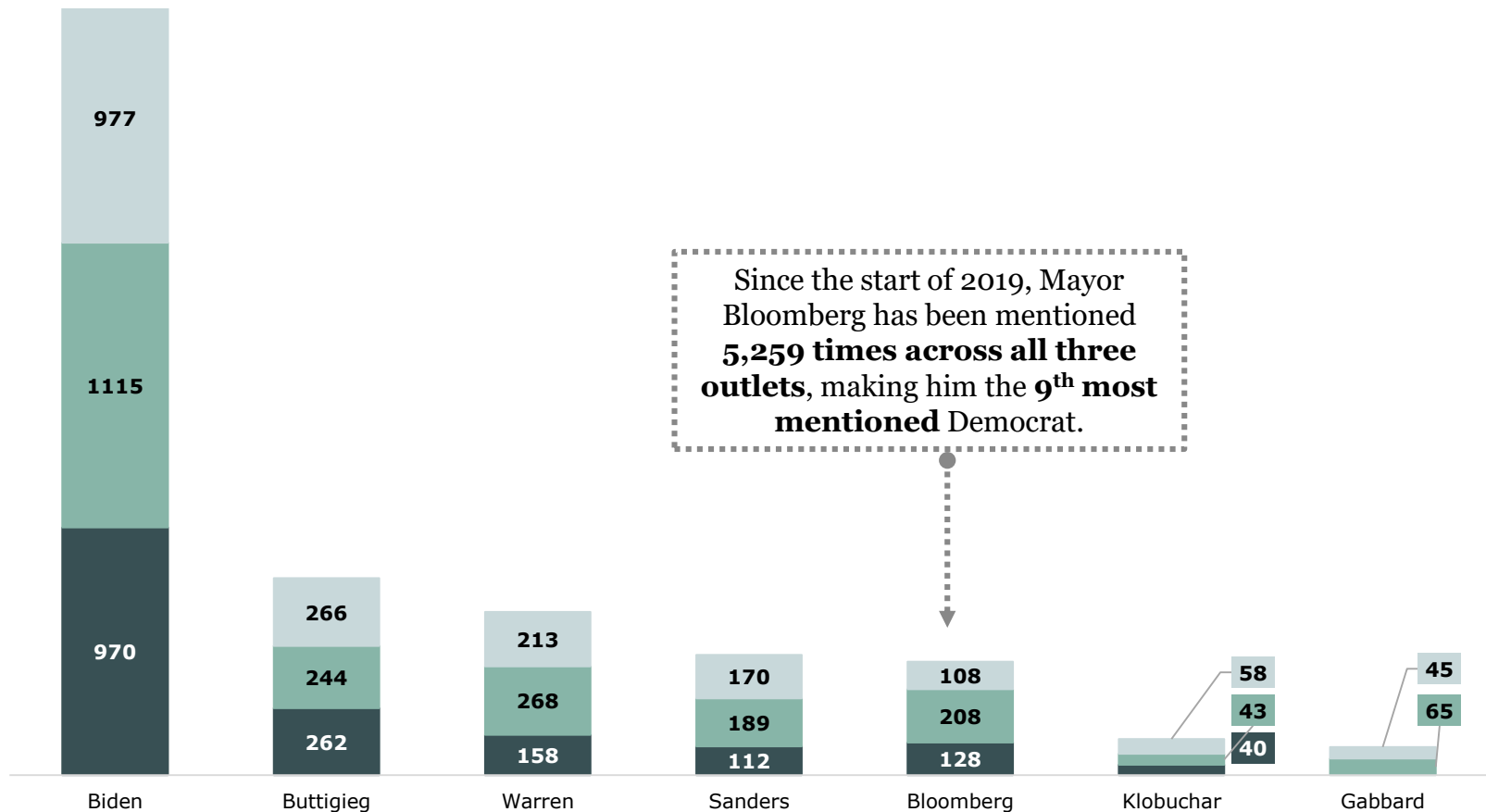


Source: Axios.

Of three major networks, former VP Joe Biden was mentioned most frequently on Fox News

Cable news mentions from the week of Nov. 26, by candidate

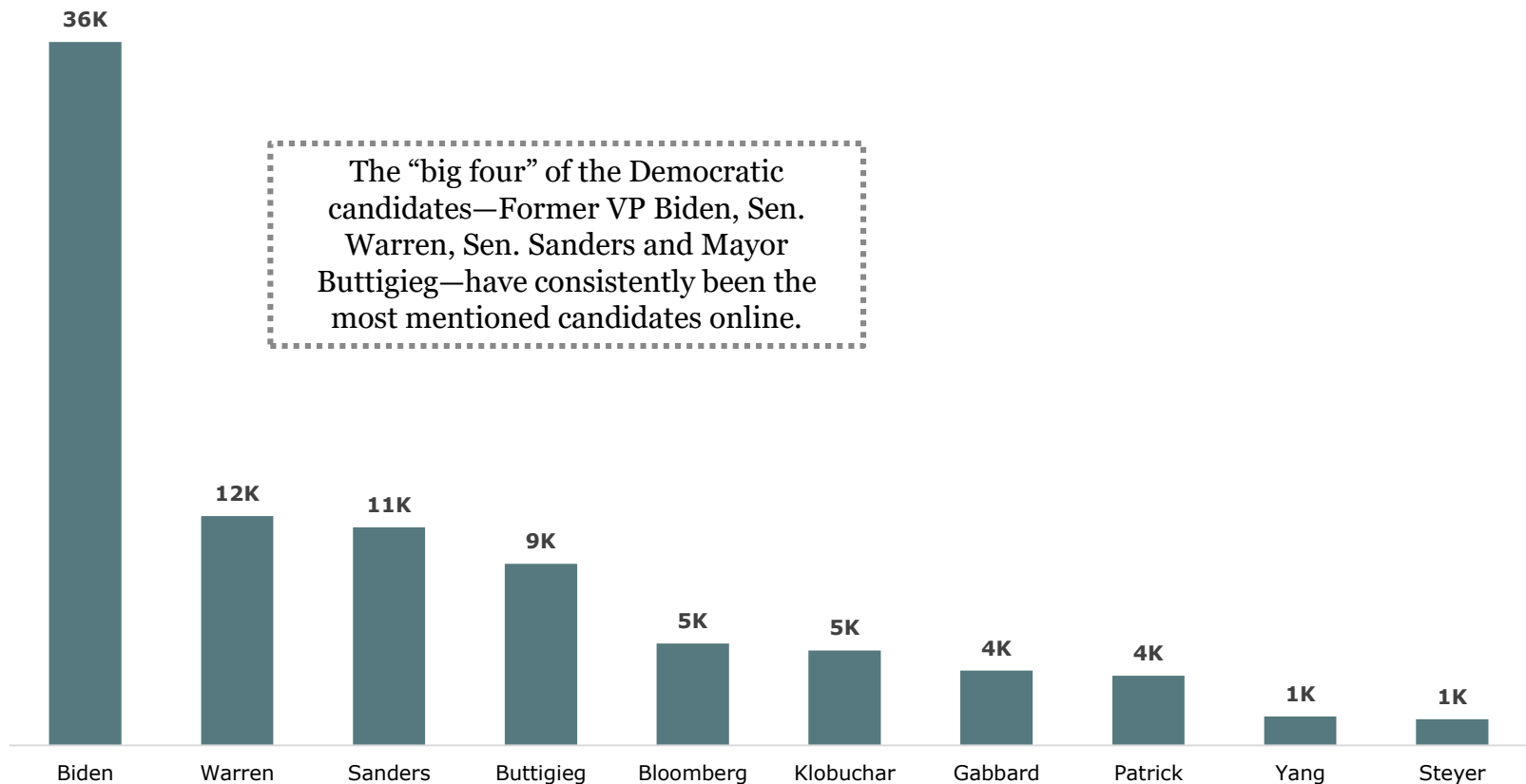
■ CNN ■ Fox News ■ MSNBC



Source: Real Clear Politics.


In online news, former VP Joe Biden is mentioned disproportionately more than all other candidates

Mentions from the week of Nov. 26, by candidate



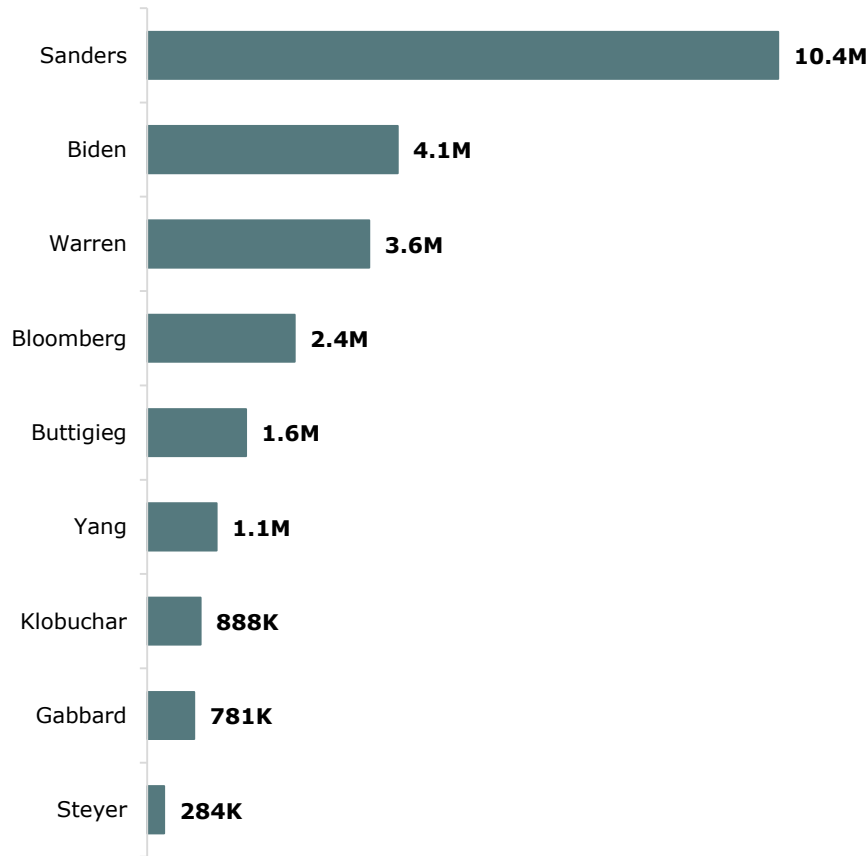
Source: Real Clear Politics.

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Since the 2016 election, Twitter has become an important aspect of political campaigns

Candidates' Twitter followers as of Feb.6, 2020



During the December debate, **former VP Joe Biden and Andrew Yang** were the most tweeted about.

Sen. Amy Klobuchar (D-MN) follows **around 140,000 accounts**, making her the candidate who follows the most Twitter users.

In the last month, Sen. Bernie Sanders (D-VT) gained over **195,000 followers**, making him the candidate that gained the most followers.

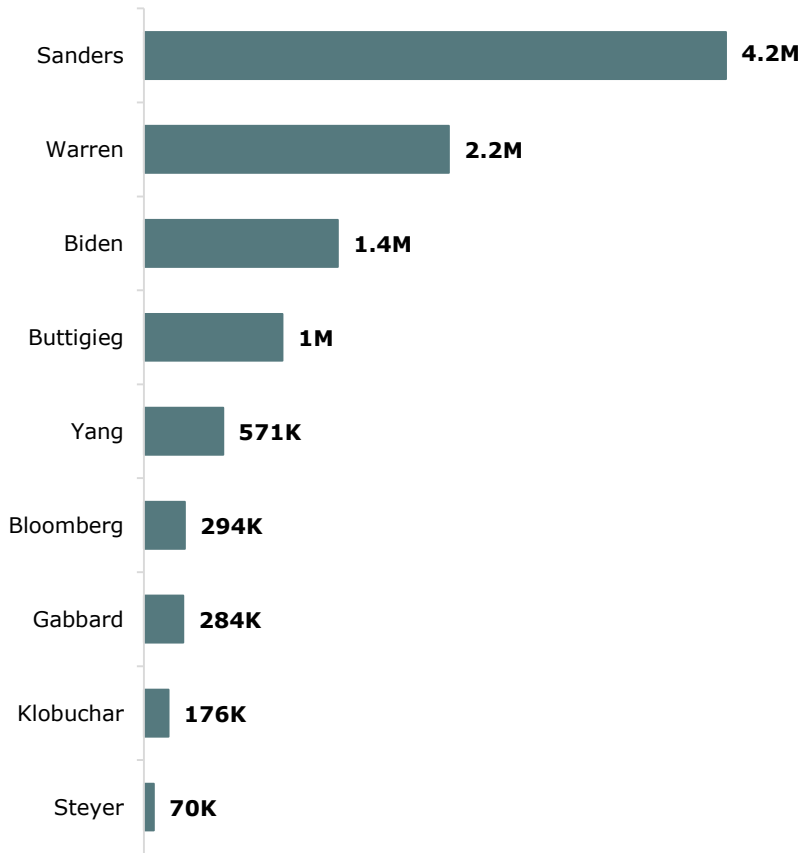
According to TwitterAudit, **Sens. Warren and Sanders** have the highest proportion of fake accounts following them of all 2020 Democratic candidates.

Andrew Yang, Mayor Buttigieg, and Rep. Gabbard have the highest engagement from their followers, based on likes and retweets.

According to one tweet analysis, **Andrew Yang** has the most positive tone and sentiment, followed by Mayor Buttigieg.

Instagram's stories and live videos have been used by some 2020 candidates, but the platform might pose future risks

Candidates' Instagram followers as of Feb.6, 2020



A Senate Intelligence Committee report found more engagement by Russian disinformation campaigns on Instagram than any other platform.

A recent NYU Stern study said that Instagram is at the biggest risk of disinformation campaigns during the 2020 election cycle.

In a Business Insider poll of respondents between 13 and 21 years old, **59%** listed social media as a top news source and **65%** said they check Instagram daily.

An August 2018 Pew Research study found that only **14%** of Americans said they changed their views on a specific issue thanks to social media.

Instagram stories and live videos have been used by 2020 Dems: **Sen. Warren** announced her exploratory committee via story.

Despite not having the largest following, **Mayor Buttigieg's** use of social media has led him to have the biggest Instagram follower growth of all 2020 Democrats.

Social media political advertising policies

The role of social media in spreading false political advertisements has been a concern among politicians and the public since Russians used Facebook during the 2016 cycle to spread inflammatory and divisive messages

FACEBOOK

Facebook has received backlash for its advertising policies, which allow for advertisements with false messages:



Fact-checking political speech: Politicians are exempt from Facebook's third-party fact-checking policy, which applies to photos and videos to prevent the spread of false information.

- Facebook officials have stated that the platform should not “referee political debates” or “prevent a politician’s speech from reaching its audience” and that content instead should be subject to scrutiny and interpretation by the public.
- However, if a politician posts previously “debunked” content, such content will be demoted and related factual information will be displayed; debunked content will not be allowed in advertisements.



Newsworthiness content exemption: Since 2016, Facebook has exempt statements or information that breaks its community standards if its deemed a public interest.

- Since Sept. 2019, this exemption applies to speech from politicians and as a general rule will not be removed.
- Political speech will continue to be subject to Facebook’s standards and evaluations of public interest value relative to risk of harm.



On Nov. 22, Twitter **banned all political advertisements** on its platform. New changes include:



A global ban on the promotion of political content and advertisements of any type from political figures, including candidates, parties, and government officials

- The ban includes advertisements appealing for votes or financial support, and ads that advocate for or against any of the political content that will be prohibited.
- The ban specifically prohibits advertisements of any types by candidates, political parties, government officials, PACs, Super PACs, and 501(c)(4) organizations.



Identification of “cause-based” ads, which will be restricted as targeted advertising and will require certification prior to publication

- This policy limits “micro-targeting,” whereby content is tailored and personalized to take advantage of audience vulnerabilities.
- Cause-based ads targeted by ZIP code, tailored to a specific audience, or associated with prohibited advertisers or political content will be prohibited.

Source: Facebook; New York Times; CNBC.