



For Immediate Release:

Clinton and Sanders Even in Ad War; Cruz and Rubio Gain on Bush in S. Carolina

Outside Group Ads Continue to Flood Airwaves in Record Numbers; Republican Ads Attack Rubio, Rubio Attacks Clinton

(MIDDLETOWN, CT) **February 18, 2016** – Endorsements and national poll numbers have favored Hillary Clinton in the race for the Democratic presidential nomination, but her advantage does not extend to political advertising. New research by the Wesleyan Media Project, in conjunction with the Center for Responsive Politics—and partially funded by a new grant from the Knight Foundation--shows that about 38,800 ads favoring Clinton have aired nationwide this cycle (from January 1, 2015 through February 14, 2016 at an estimated cost of \$20.8 million). This is almost the same as the 38,200 ads that have aired favoring Bernie Sanders (at an estimated cost of \$20.1 million).

“It would be hard to find two candidates more evenly matched in terms of the air war than Hillary Clinton and Bernie Sanders in 2016,” said Travis N. Ridout, co-director of the Wesleyan Media Project.

Table 1: Cost and Count of Ads Favoring Each Candidate Nationwide (including supportive outside groups)

Favored Candidate	Est. Cost (in millions)	Airings
Clinton	\$20.8	38,811
Sanders	20.1	38,244
Bush	61.9	35,871
Rubio	35.3	32,591
Cruz	10.6	14,529
Carson	4.3	12,115
Trump	6.6	11,459
Kasich	11.2	4,936

Figures are from Jan 1, 2015 to Feb 14, 2016. Numbers include broadcast television, national network and national cable television.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

On the Republican side, Jeb Bush holds a slight edge over Marco Rubio in the number of ads that have favored him, which is a big change from mid-December when Bush ads were more dominant on air. Almost 36,000 pro-Bush ads, at an estimated cost of \$61.9 million, have aired between January 1, 2015 and February 14, 2016, compared to about 32,600 pro-Rubio ads at an estimated cost of \$35.3 million.

Ted Cruz and Donald Trump, the leaders in most national polls, have benefited from far fewer advertisements, with 14,500 pro-Cruz ads having aired and 11,500 pro-Trump ads. A similar number of ads, a little over 12,000, have backed Ben Carson.

Looking at South Carolina, which holds its Republican primary this Saturday, we see that Right to Rise USA (Jeb Bush's super PAC) has aired over 12,400 ads this election cycle, over 2,000 more than the number of pro-Rubio ads on the air (Table 2). There were 10,347 airings of pro-Rubio spots (54 percent sponsored by outside groups). Pro-Cruz ads were third at 6,766 airings, 56 percent of which were sponsored by outside groups. Further down the list, 1,892 Carson ads and 1,515 Trump ads have aired. Pro-Kasich ads totaled 273 (nearly a quarter from his super PAC). Bush has been solely reliant on his super PAC in South Carolina markets, whereas the Trump and Carson campaigns have benefited entirely from their own campaign efforts.

The picture is somewhat different if one examines only the past two weeks since the Iowa caucuses. During that time period, pro-Cruz ads numbered 4,904; pro-Rubio ads numbered 3,882, and pro-Bush ads numbered 2,664. "Although Bush's super PAC has dominated the airwaves in South Carolina this election cycle, more Cruz and Rubio ads have been on South Carolina television screens since the beginning of February," said Michael Franz, co-director of the Wesleyan Media Project. "This may be an indicator of some sluggishness in the Bush camp. One might expect a final stand in South Carolina by pro-Bush efforts. Instead, they are being edged out."

Ad volumes in the Democratic race have been much lower, with Sanders airing 340 more ads than Clinton cycle to date in South Carolina. The Democrats have their primary there on February 27, and most polls put Hillary Clinton way ahead. Most of the Democrats' South Carolina advertising has occurred in the past two weeks.

Table 2: Advertising in the South Carolina Presidential Nomination Races

	Cycle to Date		Past Two Weeks	
	Airings	Est. Cost (in Ms)	Airings	Est. Cost (in Ms)
Right To Rise USA (Pro-Bush)	12,480	13.1	2,664	2.8
Rubio, Marco	4,803	2.7	2,058	0.9
Conservative Solutions PAC (Pro-Rubio)	3,545	3.9	1,824	2.1
Cruz, Ted	3,009	1.5	2,073	0.9
Stand For Truth, Inc (Pro-Cruz)	2,293	1.9	1,692	1.6
Conservative Solutions Project (Pro-Rubio)	1,999	2.4	-	0.0
Carson, Ben	1,892	0.6	-	0.0
Trump, Donald	1,515	0.9	1,189	0.6
Keep The Promise I (Pro-Cruz)	1,464	2.4	1,139	2.0
Sanders, Bernie	1,273	0.6	1,075	0.4
Clinton, Hillary	933	0.4	933	0.4
American Future Fund	381	0.3	381	0.3
Kasich, John	210	0.1	36	0.0
Club For Growth Action	135	0.1	92	0.1
New Day For America (Pro-Kasich)	63	0.1	63	0.1
Our Principles PAC (Anti-Trump)	24	0.0	24	0.0

Figures are from January 1, 2015 to February 14, 2016, and February 1 to February 14, 2016, and include the Greenville, Charleston, Columbia, Myrtle Beach, Charlotte, Savannah and Augusta media markets. Numbers include broadcast television.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

In Nevada, which holds Democratic caucuses Saturday, pro-Sanders ads have slightly outnumbered pro-Clinton ads, 4,650 to 4,156, but during the past two weeks there have been slightly more pro-Clinton ads on the air (Table 3). Clinton’s campaign has aired 2,227 ads in Nevada, compared to 2,120 for Sanders. In the Republican race, Rubio and the pro-Rubio outside group, Conservative Solutions PAC, have aired over 800 ads combined while Carson has put up 529 airings.

Table 3: Advertising in the Nevada Presidential Nomination Races

	Cycle to Date		Past Two Weeks	
	Airings	Est. Cost (in Ms)	Airings	Est. Cost (in Ms)
Sanders, Bernie	4,650	\$2.6	2,120	\$1.2
Clinton, Hillary	4,156	2.5	2,227	1.3
Rubio, Marco	508	0.3	364	0.2
Conservative Solutions PAC (Pro-Rubio)	296	0.3	296	0.3
Carson, Ben	529	0.2		
Foundation for a Secure & Prosperous America (Anti-Paul)	128	0.1		
Right to Rise USA (Pro-Bush)	41	0.1	41	0.1
Keep the Promise I (Pro-Cruz)	33	0.1	33	0
Cruz, Ted	29	0.1		
SEIU Cope (Anti-GOP)	38	0		
Latino Victory Project (Anti-GOP)	8	0		

Figures are from January 1, 2015, to February 14, 2016, and from February 1 to February 14, 2016, and include the Las Vegas and Reno media markets. Numbers include broadcast television.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

GOP Ad Volumes Up over 2012; Ad Spending Almost Triples

Table 4 shows that the volume of GOP presidential ads on the airwaves to date in the 2016 election cycle is up nearly 22 percent over this same time frame in the 2012 election cycle. Spending has also skyrocketed, increasing from \$58 million in the 2008 cycle and \$57 million in the 2012 cycle to an estimated \$156 million in the current election cycle.

Outside group-sponsored advertising dominates the airwaves. While outside groups sponsored less than 1 percent of airings to this point in 2008, their share of ad airings to this point in 2012 was just over 55 percent. Their share of ad airings has increased to 57.5 percent in the 2016 election cycle (a 26 percent increase in volume over 2012 and a 23,500 percent increase over 2008).

Table 4: Advertising in GOP Presidential Primaries

Year		Candidate sponsors	Outside Group sponsors	Total
2008	Ads Aired	75,982	325	76,307
	Row %	99.57%	0.43%	
	Cost	\$56M	\$144,435	\$56.2M
2012	Ads Aired	48,964	60,838	109,802
	Row %	44.59%	55.41%	
	Cost	\$18.6M	\$39M	\$57.7M
2016	Ads Aired	56,741	76,840	133,581
	Row %	42.48%	57.52%	
	Cost	\$34.3M	\$122.1M	\$156.4M
	% volume increase over 2012	15.88%	26.30%	21.66%
	% volume increase over 2008	-25%	23,543%	75.06%

Figures are from Jan 1, 2015 through Feb 14, 2016 (compared to Jan 1, 2007 through Feb 14, 2008 and Jan 1, 2011 through Feb 14, 2012).

Numbers include broadcast television, national network and national cable television.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

The battle for the GOP nomination continues to be more intense than the Democratic contest, both cycle-to-date and in the last two weeks (Table 5). Ads in the Democratic race have totaled about 78,600 (with 12,000 ads between February 1 and 14), compared to over 133,600 on the Republican side (with nearly 22,000 in the last two weeks).

Table 5: Ad Spending and Airings

	Since January 1, 2015		Past Two Weeks	
	Est. Cost	Airings	Est. Cost	Airings
Democratic	42.1M	78,591	6.4M	12,064
Republican	156.4M	133,607	24.5M	21,949
Total	198.6M	212,198	31.0M	34,013

Figures are from January 1, 2015, through February 14, 2016, and February 1 to February 14, 2016.

Numbers include broadcast television, national network and national cable television.

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Super PACs Dominate Advertising

Single-candidate super PACs continue to sponsor the bulk of outside group advertising (Table 6). At the top of the list is Right to Rise, which has spent an estimated \$58 million on ads supporting Jeb Bush. (Indeed, the Bush campaign directly has sponsored only about 3,500 ads total.) Conservative Solutions PAC, which backs Marco Rubio, was the second highest spender, at \$16.7 million. The only active single-candidate dark money group with more than 550 ad airings—a type of group that does not disclose donors—is Conservative Solutions Project, a 501c4 that backs Rubio. (As reported in our [December release](#), America Next which was also a c4 supporting Bobby Jindal was active earlier in the cycle with 539 airings).

Table 6: Outside Group Sponsors in GOP Presidential Race

Outside Group	Est. Cost (in Ms)	Ads	Advocates for...	Type
Right To Rise USA	\$57.6	32,367	Jeb Bush	super PAC
Conservative Solutions PAC	16.7	10,361	Marco Rubio	super PAC
America Leads	13.2	5,377	Chris Christie	super PAC
Conservative Solutions Project	7.1	4,882	Marco Rubio	c4
Stand for Truth	3.0	4,196	Ted Cruz	super PAC
Opportunity & Freedom PAC	1.1	3,441	Rick Perry	super PAC
New Day for America	9.0	3,010	John Kasich	super PAC
Believe Again	2.5	2,409	Bobby Jindal	super PAC
Keep The Promise I	3.4	2,304	Ted Cruz	super PAC
Pursuing America's Greatness	0.7	1,277	Mike Huckabee	super PAC
New Day Independent Media Committee, Inc	1.5	802	John Kasich	super PAC
Club For Growth	0.9	735	.	PAC
Foundation for a Secure & Prosperous America	0.3	699	.	c4
Security Is Strength PAC	0.9	588	Lindsay Graham	super PAC
American Future Fund	0.8	574	.	c4
Purple PAC	0.4	570	Rand Paul	super PAC
Our Principles PAC	0.3	565	Anti-Trump	super PAC

Figures are from January 1, 2015 to February 14, 2016. Outside groups that aired fewer than 550 ads are not included.

Numbers include broadcast television, national network and national cable television.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project. Group classification by the Center for Responsive Politics.

Table 7 shows that just over 90 percent of non-candidate sponsored advertising was paid for by super PACs, while 501c4 (“dark money”) organizations have sponsored about 9 percent of non-candidate advertising. 527 organizations account for the rest of outside group-sponsored spending.

Table 7: Outside Group Ads in GOP Presidential Primary by Type

Type	Disclose Donors?	Ad Volume	Est. Cost (in millions)	% of group volume
Super PAC	Yes	69,513	112.8	90.5
c4	No	6,861	9.1	8.9
527	Yes	465	0.2	0.6
		76,840	122.1	

Figures are from January 1, 2015 to February 14, 2016. Numbers include broadcast television, national network and national cable television.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

Outside group classification by the Center for Responsive Politics.

"The fact that so much money is coming from unlimited, and in many cases secret, pools of money raises important questions about who really has a say in our elections," said Sheila Krumholz, executive director of the Center for Responsive Politics. "Most Americans don't even contribute \$200 to political campaign, much less \$2 million or more to a super PAC or 501(c)(4)."

Attacks Ramp Up in GOP Race

While the Democratic candidates have aired an extremely positive ad campaign over the past two weeks (Table 8), the Republican race is turning negative. While two-thirds of ads sponsored by Republican candidates were positive, 24 percent were contrast (mentioning both a sponsor and an opponent), and 9 percent were pure attack ads. Attacks are even more prevalent when one examines ads sponsored by Republican outside groups: 45 percent of those ads were negative, and 29 percent were contrast.

Table 8: Tone of Race by Party and Sponsorship

	Positive	Negative	Contrast	Airings
Democratic candidates	99.6%	0%	0.4%	12,015
Republican candidates	67.5%	8.7%	23.9%	10,209
Democratic outside groups				0
Republican outside groups	26.3%	44.8%	28.9%	11,740
All groups and sponsors	21,938	6,144	5,882	33,964

Figures are from February 1 to 14, 2016. Numbers include broadcast television, national network and national cable television.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

Republicans Attacking Rubio, Rubio Attacking Clinton

Table 9 shows that, in the past two weeks, Rubio has been the most targeted candidate on the Republican side, being attacked in 5,348 ad airings, primarily from pro-Cruz and pro-Bush sponsors (with 3,708 and 1,535 attacks respectively), but pro-Kasich advertisers have also gone after him in roughly a fifth of their 515 airings (105 airings total). Cruz has been targeted in 2,718 airings, over half of which have come from Rubio with another 40 percent coming from Trump. Trump has been attacked primarily by both pro-Rubio airings and pro-Cruz airings (clocking in at 1,127 and 763 attacks respectively), but Right to Rise USA has also gone after Trump in 220 airings. The Trump campaign has attacked only Cruz, mentioning him in 1,081 airings.

Democratic candidate Hillary Clinton has been the target in 4,668 airings, 81 percent of which have come from the Rubio campaign or outside groups backing Rubio.

“While Rubio has been the primary target of attacks, taking heat from pro-Cruz, pro-Bush, and pro-Kasich ad sponsors, pro-Rubio ads have dished out more attacks on Clinton than Rubio himself has received from his fellow Republicans,” said Erika Franklin Fowler, co-director of the Wesleyan Media Project. “Rubio has attacked both Cruz and Trump, but his primary focus has been Hillary Clinton with an eye perhaps on the general election.”

Table 9: Candidate Attacks by Sponsoring Candidate and Supporting Outside Groups

Favored Candidate...	Airings Attacking...			
	Cruz	Clinton	Trump	Rubio
Bush	125	267	220	1,535
Carson	-	-	-	-
Cruz	-	596	763	3,708
Kasich	-	1	1	105
Rubio	1,512	3,804	1,127	-
Trump	1,081	-	-	-
Total Airings Attacking...	2,718	4,668	2,111	5,348

Data based on analysis of ads aired from February 1 to 14, 2016. Numbers include broadcast television, national network and national cable television.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

Democratic Ads Focus on Social and Economic Issues; GOP Ad Focus More Varied Across Candidates

The issue focus of pro-Republican airings varies widely by whom the ad favors, as Table 10 reveals. While pro-Bush airings focus on national security, immigration and foreign affairs, pro-Cruz ads have hammered on issues of immigration, foreign affairs and faith/religious values. (He has also aired a fair number of ads attacking the Affordable Care Act.) Pro-Kasich airings, by contrast, have focused primarily on economic issues. Rubio ads have discussed Benghazi, foreign affairs and healthcare (to include anti-ACA attacks), while Trump ads have focused on issues related to immigration, the economy and Wall Street. ACA attacks are featured in some Cruz and Rubio ads (with just a handful aired by Bush and Kasich) but did not dominate the conversation.

On the Democratic side, Clinton’s ads have focused primarily on social issues, including women’s rights, education and healthcare. Sanders has focused on two economic issues, Wall Street and the minimum wage, but has also given considerable attention to women’s issues, which are the second most mentioned issue in his advertising.

Table 10: Top Issue Mentions by Candidate and Supporting Outside Groups

Favored Candidate	Top Issue	2nd Issue	3rd Issue
Bush	National Security	Immigration	Foreign Affairs
Carson	Faith/Religious values		
Clinton	Women’s issues	Education	Healthcare
Cruz	Immigration	Foreign Affairs	Faith/Religious values
Kasich	Budget	Jobs	Taxes
Rubio	Benghazi	Foreign Affairs	Healthcare/Anti-ACA
Sanders	Wall Street	Women’s issues	Min. wage
Trump	Immigration	Economy	Wall Street

Data based on analysis of ads aired from February 1 to 14, 2016.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

Dark Money More Prominent in Early Senate Airings

Early advertising in Senate races has been dominated so far by dark money ads as shown in Table 11. 501c organizations have aired 16,752 ads to date, nearly 60 percent of all ads on air and 84 percent of outside group advertising.

Table 11: Early Senate Airings by Type

	Airings	Est. Cost (in Ms)	% of Volume
Candidate	8,911	\$7.0	30.9%
Outside groups			
PACs	271	\$0.3	0.9%
501c	16,789	\$29.1	58.2%
super PAC	2,898	\$3.7	10.0%
Total	28,869	\$40.1	

Figures are from Jan 1, 2015 through Feb 14, 2016.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

Outside group classification by the Center for Responsive Politics.

As shown in Table 12, 501c organizations have been particularly active in Ohio (4,713 airings), Wisconsin (3,492 airings) and Pennsylvania (2,674).

Table 12: Early Senate Advertising by Race and Sponsor

Race	Sponsor	Type	Airings	Est. Cost (in Ms)
Alabama	Shelby, Richard	Candidate	5,444	4.3
	Mcconnell, Jonathan	Candidate	1,619	0.5
	Citizens For A Sound Government	c4	105	0.1
	Citizen Super Pac	PAC	206	0.2
Arkansas	Boozman, John	Candidate	2	0.0
Arizona	U.S. Chamber Of Commerce	c6	429	0.5
Colorado	Blaha, Robert	Candidate	3	0.0
	Conservation Colorado	c4	383	0.7
	Center Forward	c4	440	0.4
	Crude Coalition	Corp.	10	0.0
Florida	Grayson, Alan	Candidate	14	0.0
	Crossroads Grassroots Policy Strategies	c4	30	0.0
Illinois	Kirk, Mark	Candidate	139	0.2
	Natural Resources Defense Council	c3	762	4.8
	U.S. Chamber Of Commerce	c6	295	1.1
Indiana	Stutzman, Marlin	Candidate	225	0.1
Maryland	Van Hollen, Chris	Candidate	1,092	1.2
	Women Vote	super PAC	1,109	1.1
Missouri	One Nation	c4	567	1.0
	American Chemistry Council	c6	449	0.6
New Hampshire	Senate Majority PAC	super PAC	316	0.3
	American Civil Liberties Union & Tea Party Patriots	c4s	37	0.0
	One Nation	c4	330	0.8
	Citizens For Responsible Energy Solutions	c4	12	0.0
	ESA Fund	super PAC	119	0.1
	Planned Parenthood Action Fund	c4	25	0.0
	Allied Progress	c3	1	0.0
	Citizens For A Strong New Hampshire	c4	5	0.0
	Americans For Prosperity	c4	272	0.3
	Impact America Action	c4	278	0.3

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Table 12 (con't)

Race	Sponsor	Type	Airings	Est. Cost (in Ms)
Nevada	U.S. Chamber Of Commerce	c6	667	0.5
	One Nation	c4	525	1.3
Ohio	Sierra Club	c4	856	1.5
	American Chemistry Council	c6	851	1.3
	One Nation	c4	748	1.5
	New Leadership For Ohio	PAC	65	0.1
	Planned Parenthood Action Fund	c4	44	0.0
	U.S. Chamber Of Commerce	c6	445	0.4
	Americans For Prosperity	c4	1,769	2.2
Pennsylvania	Toomey, Pat	Candidate	373	0.8
	Environmental Defense Action Fund	c4	577	1.9
	Natural Resources Defense Council Action Fund	c4	556	2.1
	American Chemistry Council	c6	348	0.5
	Planned Parenthood Action Fund	c4	73	0.2
	U.S. Chamber Of Commerce	c6	265	0.6
	Concerned Veterans For America	c4	855	1.3
	Center Forward	c4	288	0.4
	Wisconsin	League Of Conservation Voters	c4	1,930
Environmental Defense Action Fund		c4	999	0.7
Club For Growth Action		super PAC	458	0.7
Restoration PAC		super PAC	896	1.4
Planned Parenthood Action Fund		c4	49	0.0
Wisconsin Alliance For Reform		c4	514	0.6

Figures are from Jan 1, 2015 through Feb 14, 2016.

CITE SOURCE OF DATA AS: Kantar Media/CMAG with analysis by the Wesleyan Media Project.

Outside group classification by the Center for Responsive Politics.

About This Report

Data reported here do not cover local cable buys, only broadcast television, national network and national cable buys. All cost estimates are precisely that: estimates. Disclosure categorization information on outside groups comes from the Center for Responsive Politics.

The Wesleyan Media Project provides real-time tracking and analysis of all political television advertising in an effort to increase transparency in elections. Housed in Wesleyan's Quantitative Analysis Center – part of the Allbritton Center for the Study of Public Life – the Wesleyan Media Project is the successor to the Wisconsin Advertising Project, which disbanded in 2009. It is directed by Erika Franklin Fowler, assistant professor of government at Wesleyan University, Michael M. Franz, associate professor of government at Bowdoin College and Travis N. Ridout, professor of political science at Washington State University. Laura Baum is the Project Manager.

The Wesleyan Media Project is supported by grants from The John S. and James L. Knight Foundation and Wesleyan University. Data are provided by Kantar Media/CMAG with analysis by the Wesleyan Media Project using Academiclip, a web-based coding tool. The Wesleyan Media Project is partnering this year with both the Center for Responsive Politics, to provide added information on outside group disclosure, and Ace Metrix, to assess ad effectiveness.

The Center for Responsive Politics is the nation's premier research group tracking money in U.S. politics and its effect on elections and public policy. Nonpartisan, independent and nonprofit, the organization aims to create a more educated voter, an involved citizenry and a more transparent and responsive government. CRP's award-winning website, OpenSecrets.org, is the most comprehensive resource available anywhere for federal campaign contribution and lobbying data and analysis.

Periodic releases of data will be posted on the project's website and dispersed via Twitter @wesmediaproject. To be added to our email update list, click here.

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About Wesleyan University

Wesleyan University, in Middletown, Conn., is known for the excellence of its academic and co-curricular programs. With more than 2,900 undergraduates and 200 graduate students, Wesleyan is dedicated to providing a liberal arts education characterized by boldness, rigor and practical idealism. For more, visit www.wesleyan.edu.

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