MEMORANDUM

TO:	Interested Parties
FROM:	Deep Root Analytics
DATE:	July 2, 2019
RE:	Political Audience Viewership of First Democratic Debate

METHODOLOGY

Deep Root Analytics, an audience-powered analytics company that analyzes how key voter and consumer audiences consume media, partnered with **TiVo**, a global leader in entertainment technology and insights, to measure viewership of the debates. This analysis provides the first viewership metrics among Democratic primary voters, including the early states that campaigns care about most.

The analysis was conducted by anonymously matching Deep Root's in-house voter file, which includes dozens of political segments including Democratic primary voters, to TiVo's second-by-second set-top box data sourced from millions of households nationwide.

With this combined dataset, we were able to see exactly how this audience watched the debate. We calculated two primary statistics – the **reach** of each night of the debate, and the **combined reach of both nights.** The first tells us what percentage of the audience watched at least part of the debate, while the second is the percentage of the audience that watched at least part of either night.

In addition, we estimated the audience rating for Democratic primary voters on a minute-by-minute basis, starting one hour before the events and ending one hour afterwards. This analysis uncovers trends in viewership across the night, helping advertisers pinpoint the moments when their creatives are likely to make the biggest impact.

KEY FINDINGS

- **Viewership was extremely high among voters:** Deep Root's analysis of key political audiences matched into TiVo's second-by-second tuning data which is sourced from millions of households nationwide, reveals a high degree of interest across the political spectrum as nearly 1 out of every 4 voters watched at least some portion of the two Democratic debates last week.

- **As many Republicans and Swing voters watched the debates as Democrats:** 25% of Democratic primary voters watched at least some of the debate nights across NBC,

MSNBC and Telemundo, but they weren't the only ones watching, as 24% of Swing voters tuned in alongside 24% of GOP primary voters as well.

- **Iowa led among early states:** Viewership among key political audiences varied substantially across the country, with Iowa leading the pack of early states at 29% reach among Democratic primary voters. Nevada viewership hit 25%, while South Carolina and New Hampshire lagged behind at about 20% each.

- **California was tops among Super Tuesday states:** 29% of Democratic primary voters in the delegate rich Super Tuesday state of California tuned in, while other Super Tuesday states with large delegate counts such as North Carolina and Virginia registered significantly smaller audiences.

- **Viewership peaked in the first 20 minutes:** Tracking viewership by minute, we found that ratings hit their maximum in the first 20 and last 10 minutes of the debate. Viewers were likely to tune-in as early as 15 minutes before the event, and stay tuned into the same station for as long as 30 minutes after the debates ended.

- **More evidence for unique 2020 enthusiasm:** Broad viewership of the debate across partisan lines serves as yet another indicator that the 2020 election will be one of extremely high interest, with both "bases" engaged and ready to turn out, as well as attracting engagement among non-ideological voters.

KEY METRICS FOR POLITICAL AUDIENCES

Nationwide, we estimate that about 25% of Democratic primary voters watched at least some of the debates across both nights.

This compares to a reach of 24% among GOP primary voters and 24% among swing voters. The relative similarity in viewership is evidence of broad-based interest in the 2020 election, as well as the prime time slot and wide distribution of the debate.

The second night, featuring more candidates generally considered to be among the top tier, also had higher sustained ratings among Democratic primary viewers.

EARLY PRIMARY STATES

Among states with early primaries, we found sharp differences in viewership levels. 29% of Democratic primary voters in Iowa watched at least part of the debate, compared to 21% in New Hampshire and South Carolina.

DEEP ROOT	Night 1 reach[1]	Night 2 reach[2]	Combined reach[3]
Iowa	19.0	20.6	28.6
New Hampshire	14.8	13.2	20.7
Nevada	18.1	16.2	25.5
South Carolina	13.9	13.8	20.7

SUPER TUESDAY STATES

Among big Super Tuesday primaries, California led with 29% of Democratic primary voters watching at least part of the debate, compared to 25% of primary voters in North Carolina.

| DEEP ROOT	Night 1 reach	Night 2 reach	Combined reach
California	19.4	20.3	28.5
Texas	18.4	19.3	26.9
Virginia	17.5	16.3	25.0
North Carolina	16.7	16.6	24.9

[1] Margin of error: 1.1%
[2] Margin of error: 1.2%
[3] Margin of error: 1.4%

MINUTE-BY-MINUTE VIEWERSHIP

Among Democratic primary voters nationwide, we found the highest levels of viewership in the first 20 minutes of the debates, as well as the last 10 minutes. We found that the tune-in period for both debates began in earnest about 15 minutes prior to the first question. We also found that the tune-out period for both debates was relatively long, with many viewers still watching the same channel 30 minutes after the debates ended. For political advertisers, this implies that ads aired in the beginning and end of the event were most likely to reach a big audience, while ads aired immediately before and after the event were potentially good bargains.
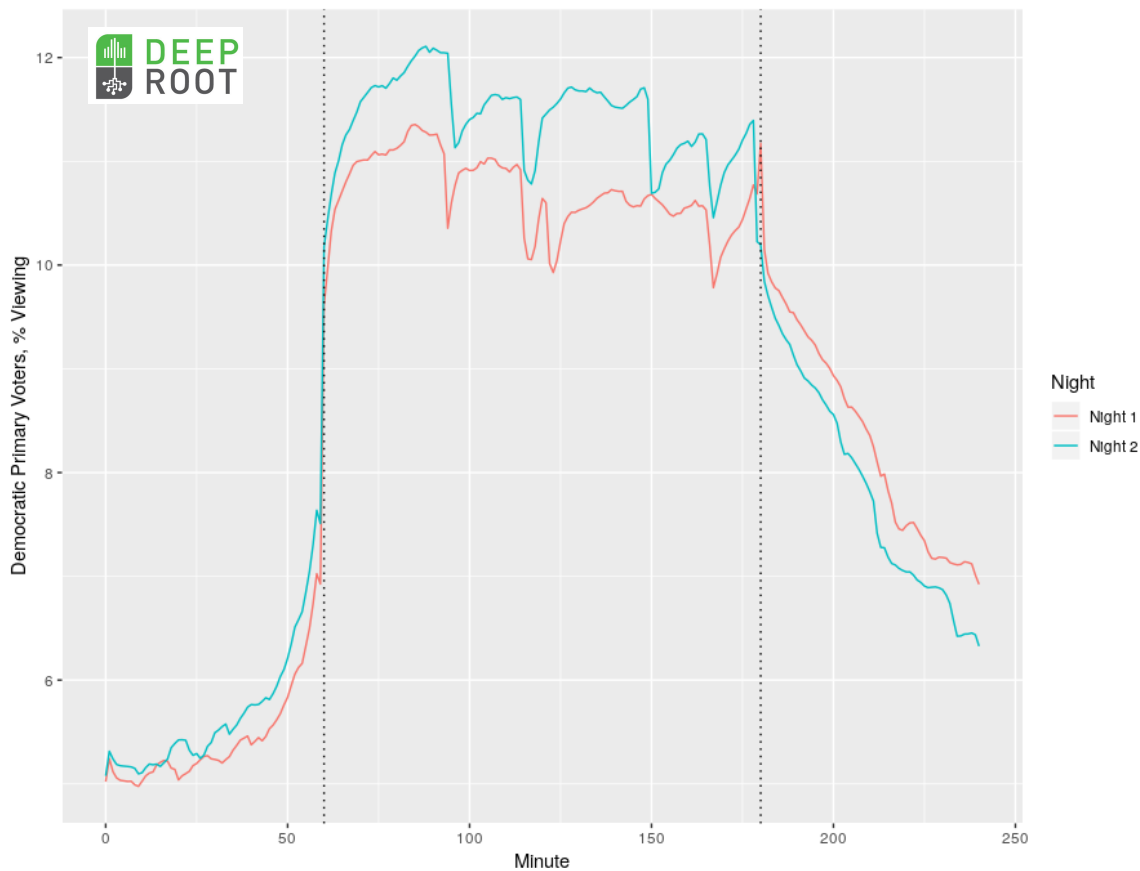
CONCLUSIONS

The Democratic debates this cycle are likely to be excellent buys for any policy issue or political campaign. They garner large audiences from across the political spectrum. This tracks with other polling indicating high interest in the election.

If you have the opportunity to choose when your ad will run during the program, aim for the first 30 minutes or so, when viewership reaches its peak, or for the last ad break, when viewership bounces back a bit from intra-program lows.

There are likely bargains available 15-20 minutes before and after debates end, and not only on networks with dedicated post-debate coverage. Late local news broadcasts that begin immediately after debates are particularly likely to be good buys.