TO: Interested Parties  
FROM: Elizabeth Wilner, Kantar Media’s Campaign Media Analysis Group  
DATE: November 13, 2012  
RE: Role of jobs, outsourcing and trade in select critical 2012 contests

Even in today’s service-and-dotcom economy, one of the most popular images in 2012 political advertising was the American factory. Depicted as desolate through chained gates or shot from a brightly lit, busy floor, the factory starred in an air war dominated by debate over the health of the American economy.

The factory owes its fame primarily to geopolitics. The presidential battleground ultimately comprised just a dozen states, making it the smallest in recent memory. Nearly half—Michigan, Minnesota, Ohio, Pennsylvania and Wisconsin—were located in the nation’s industrial core, putting their shared economic interests front-and-center in the cycle’s marquee race. Always a prominent player at the presidential level, Ohio achieved near-mythical status in 2012 as the linchpin for claiming the presidency. And in the battle for control of the Senate, hotly contested races in Indiana, Ohio and Wisconsin were seen as key to control of the chamber, while Pennsylvania’s Senate race emerged as a sleeper.

But the factory also owes its recent fame to the widespread view among voters of America as a country that makes and builds, and among the academic charts and business cable news graphics that increasingly are used to illustrate the nation’s economic circumstances in political advertising, the factory visual continues to strike a chord.

Despite some upward-ticking economic indicators, America’s airwaves in 2012 were jammed with 30- and 60-second ads about persisting joblessness, the government bailout of the automakers, and the impact in domestic employment of “shipping jobs to,” and importing products from China. The number of mentions of “jobs” nearly tripled in presidential TV advertising between 2008 and 2012 and the number of mentions of trade issues more than doubled.

At the request of the Alliance for American Manufacturing, Kantar Media’s Campaign Media Analysis Group assessed the role these issues played in broadcast TV advertising in the 2012 race for President and races for the US Senate in four Rust Belt states: Indiana, Ohio, Pennsylvania and Wisconsin.

Among our findings:

**Republicans outspent and out-aired Democrats on jobs.** In all five races, Republicans spent more money and achieved higher ad occurrence (i.e., spot count) rates than Democrats on advertising mentioning “jobs.” This likely was due to the Democratic candidate’s role as the “Washington lawmaker” in each of the five races—either as the incumbent or as a member of Congress—and Republican efforts to blame him/her for persisting unemployment and for an Obama stimulus package that allegedly failed to spur hiring or create jobs.

Democrats’ ads about jobs, meanwhile, focused on businesses sending jobs overseas and otherwise shedding workers and destroying livelihoods—which explains why the two sides’ spending and spot-count levels on jobs were closer to parity in the Presidential contest but much further apart in the Senate races. Bain Capital’s business practices became a major line of attack in advertising by
Democrats against Governor Mitt Romney in the race for the White House. Themes of outsourcing and “made in America” came up in the Senate races but not to the same degree.

Another job-related dynamic specific to the Presidential race was that, as the enclosed charts show, Republican mentions of “jobs” tended to increase and Democratic mentions tended to decrease around the release of the monthly jobs reports.

**Democrats’ messaging on jobs was more effective.** Jobs was the most-mentioned issue in 2012 advertising by far, not just in these five races but in federal races overall. The fact that Democrats won all five races despite being outspent and out-aired on the issue suggests their messages were sharper and more impactful.

In the four Senate races in particular, Republicans outspent and out-aired Democrats on jobs mentions by anywhere from $1 million and several thousand ad occurrences (in Indiana) to as much as 3:1 and 4:1 (in Ohio and Pennsylvania). The Democrats used their ads about outsourcing and firing workers to distance the Republican candidates from the voting blocs they needed to win, often punctuating them with taglines such as, “He’s not for us anymore,” and “If [he] wins, the middle class loses.”

**China dominated talk of outsourcing and trade overall.** In previous elections, China has sometimes been used in a national security context; in 2012, it was used in an economic one. In all five of the races examined by CMAG, the majority of TV advertising that focused on trade put the spotlight on China. Indeed, in the Indiana and Wisconsin Senate races, China was the focus of *all* the TV advertising containing references to trade. In the Pennsylvania race, it was the focus of all Republican advertising about trade. In Ohio, the vast majority of trade-related advertising focused on China—and all of it was aired by Democratic advertisers.

Looking more closely at the presidential race:

**Jobs and trade played exponentially bigger in 2012 than in 2008.** The increased emphasis on the economy and focus on both President Obama’s record and Governor Romney’s experience at Bain Capital all served to drive the use of jobs and trade in advertising steeply upward since the last presidential race. Mentions of jobs almost tripled in TV ad occurrences between 2008 and 2012, from 286,000 to 791,000, and mentions of trade more than doubled, from 35,000 airings to 83,000 airings.

On the one hand, the smaller battlefield put greater emphasis on the economic concerns of the states that remained, but at the same time, TV viewers in swing states simply saw far more ads in 2012 due to the proliferating number of advertisers trying to influence the outcome. Jobs and trade both took on added importance with voters and more sponsors existed to advertise about them.

**$57 million in anti-Bain ads…** Republicans nominated Governor Romney in the theory that his business and management credentials gave him special credibility to take on a President whose chief weaknesses were the economy and government spending. Disqualifying the Governor meant turning those credentials into liabilities, including through $57 million in TV advertising attacking his former firm, Bain Capital, for its alleged practices of shipping jobs overseas or eliminating them altogether.

The Obama campaign devoted substantial advertising to the outsourcing angle, including with an ad famously showing Romney singing “America the Beautiful,” while supporting super PAC Priorities USA Action produced a series of ads featuring manufacturing workers alleging that Bain under Romney laid them off and destroyed their livelihoods. One controversial TV ad produced by the group, which tried to tie Romney to the cancer death of an unemployed steelworker’s wife, dominated news coverage for
days even though it aired just twice. Another Priorities USA Action ad was found by nonpartisan ad-testing firm Ace Metrix to be the single most effective ad of the presidential race.

**...but $68 million in ads about trade.** While the anti-Bain ads received enormous media attention, more money—$68 million—actually was spent to advertise about trade. The two sides spent roughly the same amount on ads mentioning trade, about $34 million, but all the Republican ad spend went toward ads specifically mentioning China trade. The Romney campaign in particular used ads to accuse the President of not being tough enough on China trade and currency (to which the Obama campaign responded with an ad accusing Romney of sending jobs to China).

**Trade played everywhere.** Ads referencing trade issues aired in nearly every market that saw presidential advertising in 2012. The airings were concentrated in some more obvious states; for example, Cleveland saw the most at 5,138. However, of the 16 markets that saw 2,000 or more airings of ads mentioning trade, nine of the markets were outside Ohio: Charlotte, Colorado Springs, Denver, Grand Junction, Greensboro, Las Vegas, Norfolk, Orlando, Richmond, Tampa and Washington, DC.

**Ohio, Ohio, Ohio.** Worth noting is that Ohio markets in general and Cleveland in particular were dominant markets for both presidential ad spending and occurrences on all these issues. Across all markets seeing presidential advertising, Cleveland ranked second-highest for both spend and spot on mentions of jobs: $37 million and 33,877, respectively. For anti-Bain mentions, it ranked second-highest for spend and highest for spot: $4.8 million and 5,676. On trade, it ranked second-highest for spend and highest for spot: $5.8 million and 5,138. And on China trade, it ranked highest for both spend and spot: $4.6 million and 4,722.