

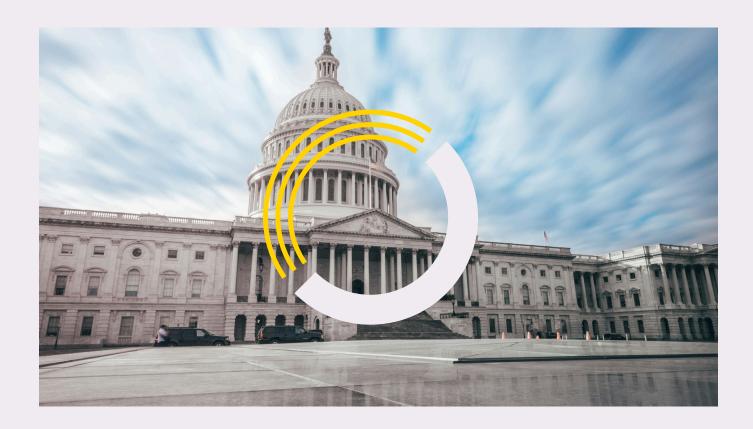
2024

US Presidential Election Media Impact Analysis

November 15, 2022 - March 31, 2024

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In the third edition of the 2024 US Presidential Election report, we examine how US media are reporting on the US presidential election between November 15, 2023, through March 31, 2024.

At Onclusive, our mission is to harness the power of our best-in-class data and products to meticulously analyze, comprehend, and extract valuable insights from the critical themes and discussions shaping the landscape of the 2024 Presidential Election cycle across both traditional and social media.

We are dedicated to providing unparalleled intelligence that empowers individuals, organizations, and society at large to make informed decisions and engage meaningfully in the democratic process.

In this report we examine:

- Topic Trends: We will identify and track the evolution of key election-related topics, including policy discussions and candidate narratives across the selected media channels.
- Geographical Variations: We will analyze how the election discourse varies among early primary and battleground states, comparing it to the national discourse.
- Media Influence: We will assess the influence of different media channels in shaping public perception and discourse related to the 2024 Presidential Election.
- Emerging Trends: Our analysis will include the identification of emerging trends and issues that may impact the election narrative.

<u>Data Collection:</u> We will employ Onclusive's tools and services, including Analyst, AP Planner, Critical Mention Broadcast and Digimind, to collect comprehensive data from a diverse range of media sources, ensuring a broad representation of public discourse regarding the 2024 Presidential Election.

<u>Media Channels:</u> Our analysis will encompass various media channels, including but not limited to:

- Online news articles and websites
- · Television broadcasts
- · Radio programs
- Podcast episodes
- · Print publications
- X (formerly Twitter) conversations, Facebook, Instagram, Pinterest, Weibo, forums, blogs, Tumblr, Reddit

<u>Geographical Focus:</u> We will specifically focus on early primary and general election battleground states to understand how election-related topics are discussed and perceived within these critical regions.

- Early Primary States: Iowa, New Hampshire, South Carolina, Nevada
- Battleground States: Wisconsin, North Carolina, Georgia, Arizona

<u>National Perspective</u>: In addition to regional analysis, we will maintain a national perspective by considering the overall political discourse in the United States.

 Centrist/Moderate, Right-leaning, Hard Right, Left-leaning, Hard Left

<u>Timeline:</u> The analysis will be conducted throughout the 2024 Presidential Election cycle, with periodic updates and a final comprehensive report delivered after the election.

<u>Key Stakeholders:</u> Our team of election experts will collaborate with Onclusive's tools and services to execute this analysis, ensuring the availability of actionable insights for decision-makers in the political landscape.







Media Mentions

436,016

Q1: 180,298

Avg. Impact Score

-1.1

Q1: -1.8

Amplification

199M

Q1: 45M

% Pos/Neg

19% / 56%

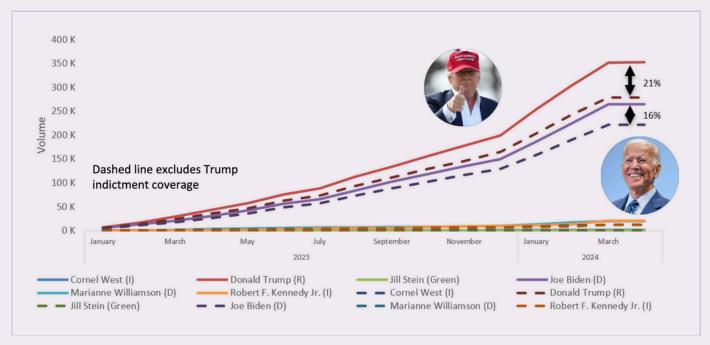
Q1: 24% / 63%

As the new year arrived, 2024 brought with it an increase in presidential campaign coverage as stumping tours escalated. Super Tuesday, primaries, caucuses, and the State of the Union address drove coverage throughout Q1.

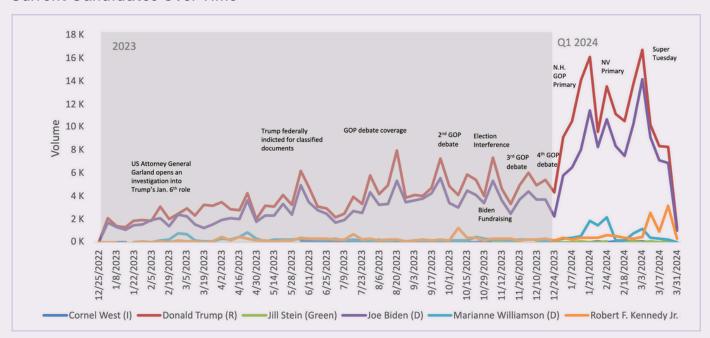
The candidate field narrowed considerably as Haley, DeSantis, Hutchinson, Ramaswamy, Christie, and Phillips dropped out

of the race. Williamson's campaign suspension and subsequent unsuspension temporarily lifted her coverage volume. Kennedy's volume also lifted temporarily in March as speculation swirled about potential VP running mates, eventually choosing Nicole Shanahan. This list included NFL quarterback Aaron Rodgers and former MN Gov. Jesse Ventura, a former professional wrestler.

Compounding Volume Over Time - Current Candidates



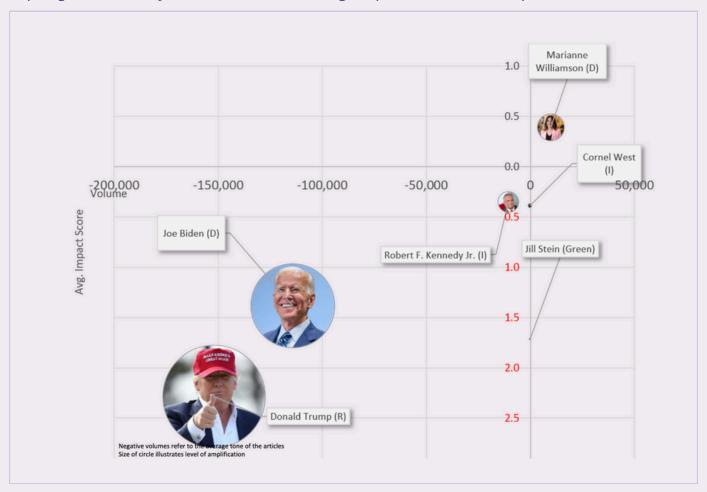
Current Candidates Over Time



^{*}Current Competitive Set as of April 2024

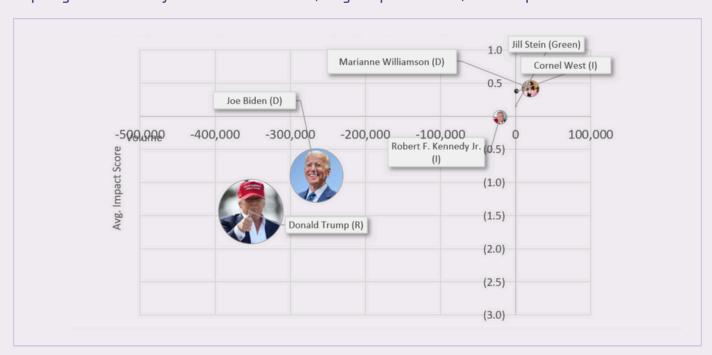
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Top Digital Media by Candidate Volume, Avg. Impact Score, and Amplification in Q1 2024



Q1 saw a slight shift with an increase in unfavorable candidate coverage, dropping Kennedy solidly into negative territory, along with Stein and West. Williamson is the only candidate to retain mostly neutral/positive traditional media coverage during the first quarter.

Top Digital Media by Candidate Volume, Avg. Impact Score, and Amplification Total



US Media: 2024 Presidential Election



Specific issues stayed fairly consistent over the past couple of quarters. Economy dropped off the top 10, with Israel / Palestine gaining traction (to 7th from 11th).

When Biden and Trump coverage mentions issues in the media, Trump sentiment tends to more negative than Biden. Right and Left publications are critical of both candidates.

Top 10 Issues



Biden v Trump and Issues in Traditional Media: Q1 2024



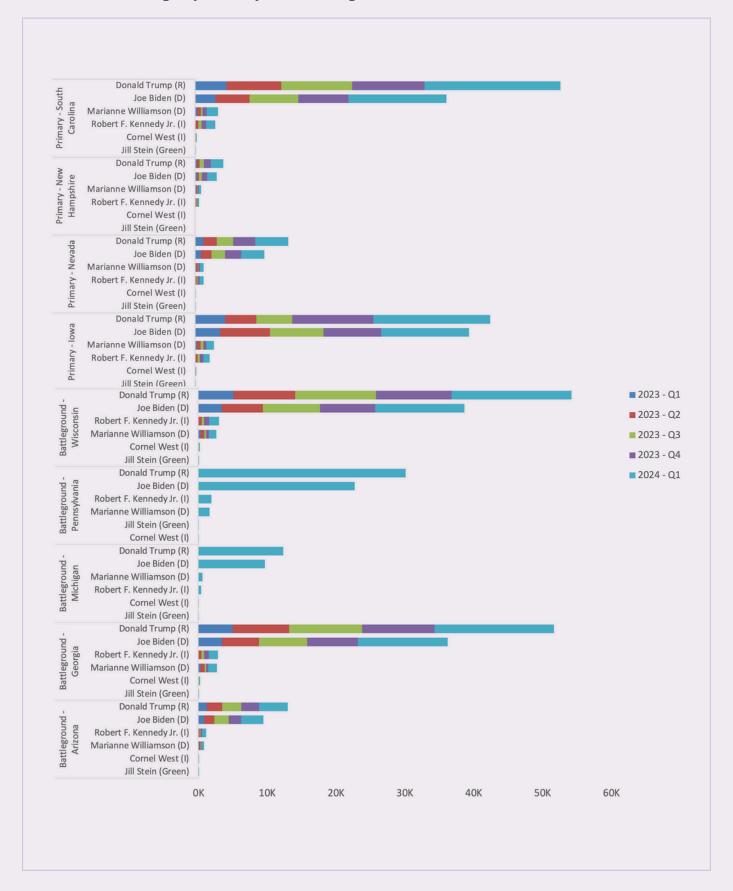
^{*}Net Neutrality Removed; Volume less than 10





Biden and Trump coverage dominate candidate stories in tracked primary and battleground states. Williamson and Kennedy swap between third and fourth, but far behind the two leading candidates.

Candidate Coverage by Primary and Battleground States

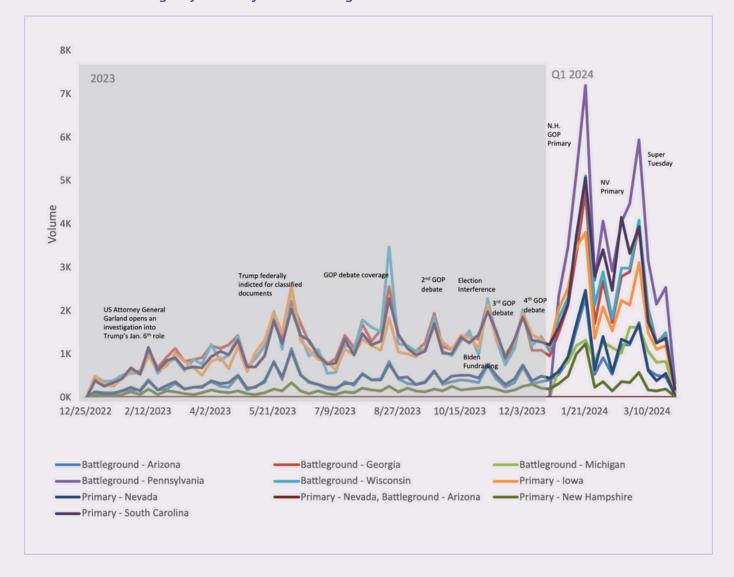




Primary and Battleground coverage trends were consistent with National as 2024 saw a massive uptick in coverage as election year officially got under way. While New Hampshire coverage increased as with other markets, the state's GOP Primary drove the coverage spike before dropping significantly.

New Hampshire's media does cover news that originates outside of the state, but at a much lower rate than other markets.

Volume of Coverage by Primary and Battleground States Over Time

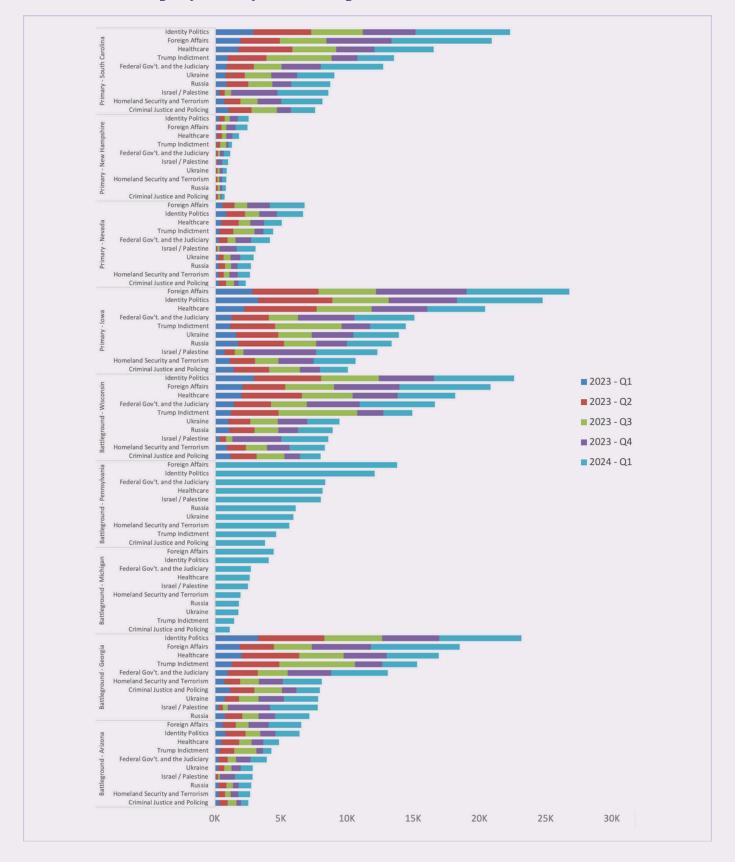




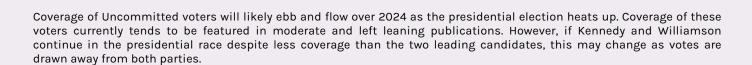
Pennsylvania is leading in coverage focusing on Foreign Affairs and Identity Politics by a large margin when compared to other markets.

Outside of the top 5 issues (identity politics, foreign affairs, healthcare, Trump indictment, and the Federal Government and the Judiciary), coverage drops off considerably.

Volume of Coverage by Primary and Battleground States Over Time



Topic: The Uncommitted

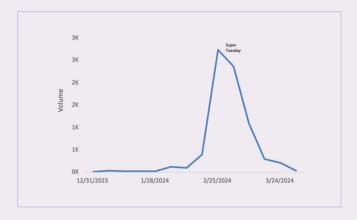


Media Mentions 7,449

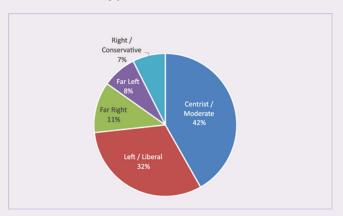
Avg. Impact Score

190K

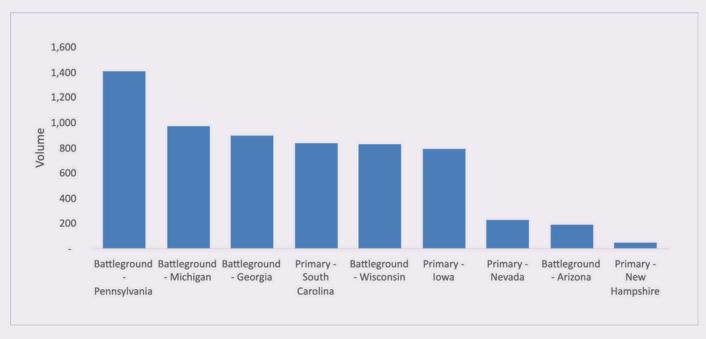
Volume Over Time

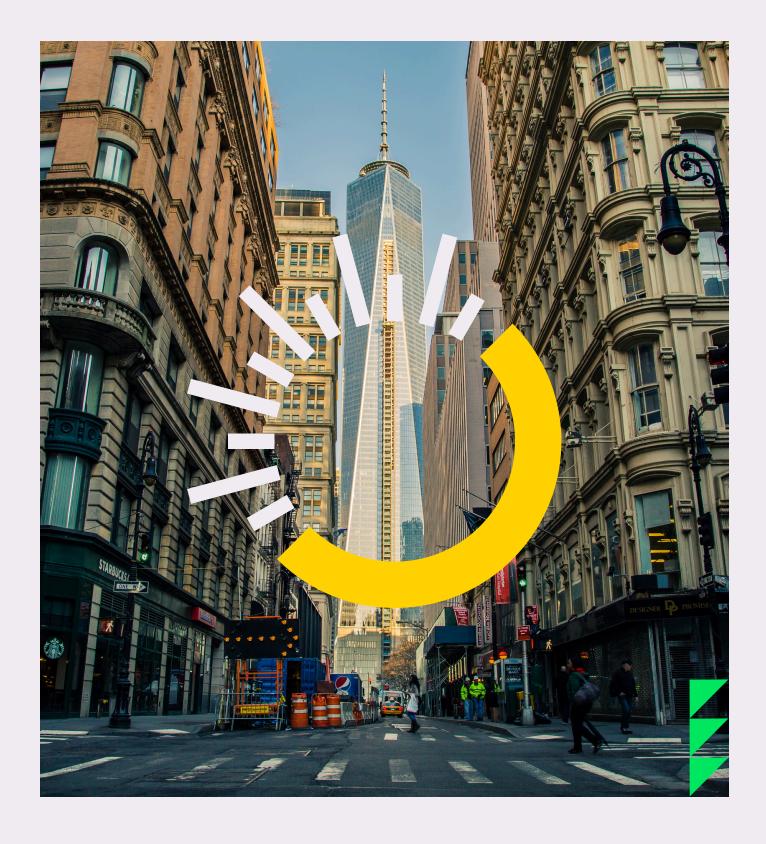


Publication Type SOV



Volume by Battleground / Primary Market





US Election 2024 Social Listening Insights



Q1 2024 Overview

US Elections +party Mentions

3.36M +13.1% / Q4 2023 **Candidates Mentions**

6.77M -0.1% / Q4 2023 People Talking about Elections + Candidates

1.8M

-5% / Q4 2023

During the specified period, there were more than 3.36 million online mentions relating to 'US elections', 'Republicans' and 'Democrats'. This is a **significant increase (+13%)** compared to the fourth quarter of 2023 (2.97 million mentions).

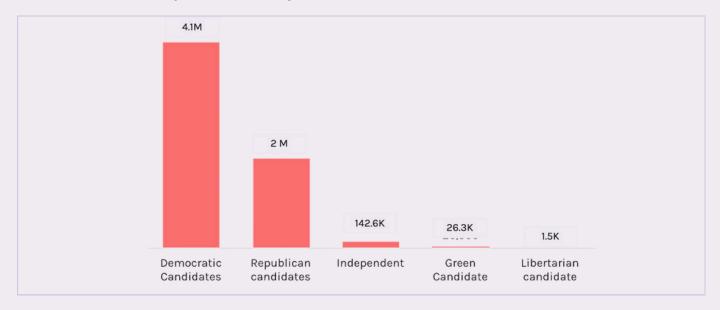
If all the conversations about each Republican, Democrat, Green, Libertarian, and Independent candidate are aggregated, the volume of conversations is **10.1 million mentions**, up 4.1% on Q4 2023.

As in Q4 2023, the 'Democrats' received more discussions than the 'Republicans', mainly due to Joe Biden's weight as President. Super Tuesday, the Supreme Court decisions, the State of the Union Address, and tensions at the Mexican border are the events that caused this increase in conversations.

Key topics driving these conversations in Q1 about 'Democrats' include **Border control and immigration**, Israel/Hamas conflict, Healthcare, Economy and Taxes. All these subjects were also discussed in the many comments on President Biden's State of the Union Address.

The topics are essentially the same on the 'Republicans' side, but with differences: the **Climate change** issue is absent from the Top 10 for discussions around the Republicans. Criticism of aid to Ukraine is also an important topic. The subject of Foreign Affairs is represented above all through criticism of its excessive importance for Biden in relation to his domestic policy.

Social Media Posts by Political Party



The topics that grew the most in terms of volume of mentions on social media compared to Q4 2023 are NATO (+83%), TikTok (+82%), Gun Legislation (+75%), Border Control and Immigration (+72%), the Age of the 2 main candidates (+68%). By contrast, topics that grew strongly in Q4 '23 given the international tensions are down: Foreign Affairs (-32%), Israel/Hamas (-45%), Iran (-46%).

The topics debated have shifted slightly towards politics and domestic security. But above all, it is the unusually high volume of conversations dedicated to foreign policy in Q4 2023 that has decreased.

Evolution / Q4 2023	NATO discussions	TikTok discussions	Gun Legislation discussions	Border Control discussions	Age of Candidates discussions
	+83%	+82%	+75%	+72%	+68%

US Election 2024: Social Listening Insights

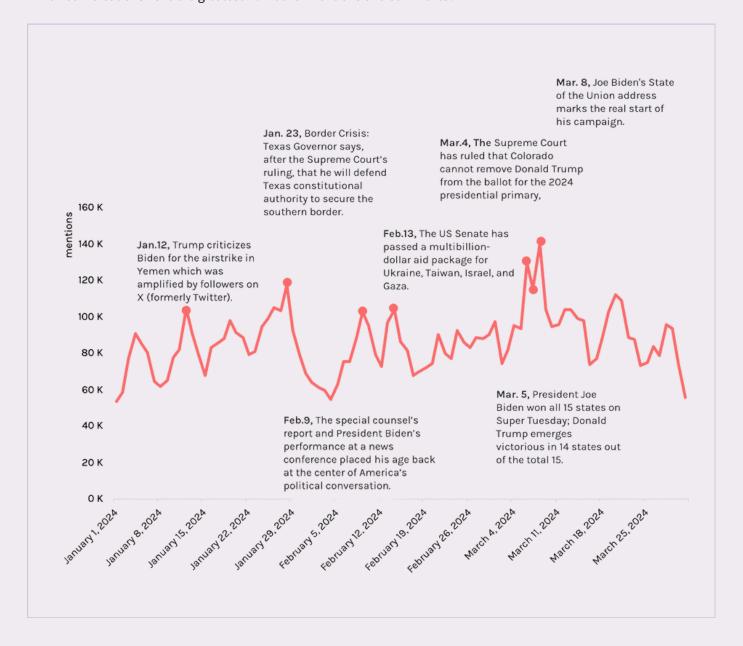


The three main peaks of conversations about the Presidential Election have to do with

- January 23: The 'border crisis' is in full swing. Texas Gov. Greg Abbott says he will defend Texas constitutional authority.
- March 5: The Supreme Court has ruled that Colorado cannot remove Donald Trump from the ballot for the 2024
 Presidential Primary, stating that it is the responsibility of Congress to decide who can hold federal offices,
 not states.
- March 8: Joe Biden's State of the Union address marks the real start of his campaign. Posts reflect mixed reactions to President's #SoTU Address, with some praising his performance and others criticizing it.

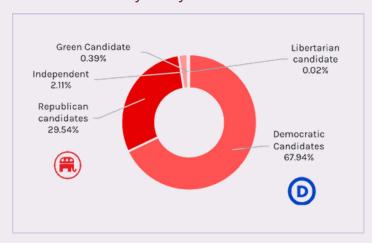
Q1 24 Timeline Highlights

Which conversations have the greatest number of mentions and comments?



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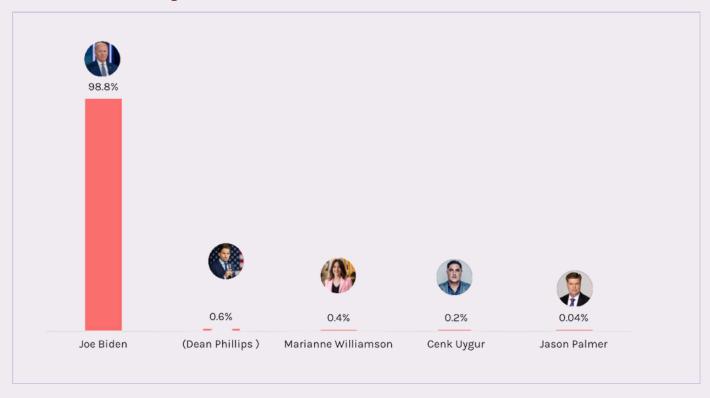
Share of Voice by Party and Candidates



During the Q1 period, more than 6.7M online mentions relate to the different presidential candidates, including more than 4.6M for Democratic candidates and 2M for Republican candidates.

Independent and green candidates gather twice as many mentions as in Q4 2023. 67% of the discussion about all presidential candidates centered on Joe Biden. And 23% of mentions relate to Donald Trump.

Share of Voice Among Democratic Candidates



Discussions about Democratic candidates increased by 3.2% compared to Q4 2023. Almost 99% of discussions about Democratic candidates are about **Joe Biden**. He receives the greatest number of mentions as President but since March 8 (State of the Union Address), he has been commented on as a candidate. He is distantly followed by **Dean Phillips** (withdrew from the race on March 6), who overtook **Marianne Williamson. Cenk Uygur** is the candidate who suffered the largest drop in mentions (-29% / Q4).

To find out how Onclusive can help you to measure the media impact of your brand and competitive landscape, get in touch with us today.





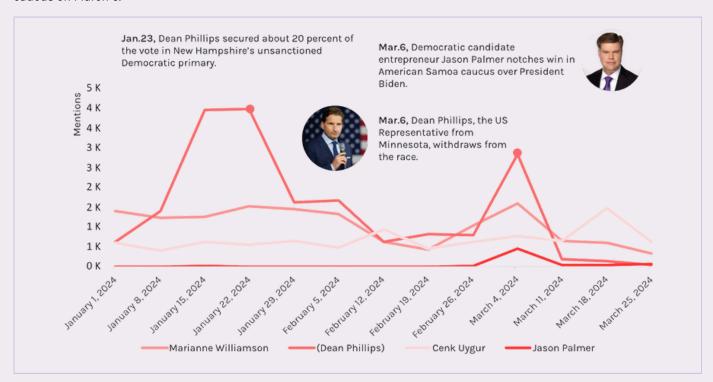
Conversation Trend for the Democratic Candidates

During this Q1 2024, Joe Biden really starts his campaign as a candidate during his State of the Union speech addressing taxes, legislation on weapons, abortion. However, his opponents accuse him of devoting too much to foreign policy to the detriment of domestic issues such as inflation, while others focus on his too advanced age.

Joe Biden timeline



During Q1 2024, **Dean Phillips** halts long-shot presidential bid while, **Marianne Williamson** withdrew from the race on February 7 and re-entered the race on February 28 . **Jason Palmer**, who announced his candidacy on November 10 , won a caucus on March 6.

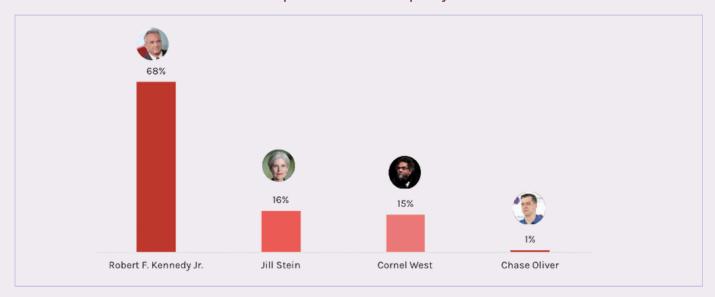




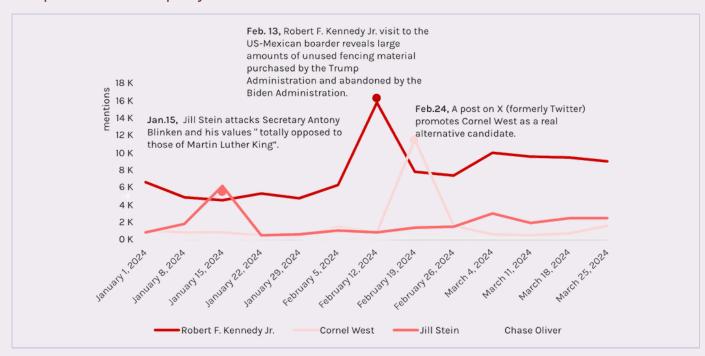
Third party or independent candidates

Robert F. Kennedy Jr. runs as an independent since October 9, 2023. He remains in Q1 2024, the Independent candidate who collects the most mentions (with a share of voice of 68%, up very slightly compared to Q4 2023). He is positioned far ahead of the other candidates, due to his choice of often controversial subjects. Green candidate Jill Stein is now ahead of Cornel West by progressing by more than 97% compared to Q4. Chase Oliver remains at a low rate of mentions on social media. Nevertheless, all these candidates have progressed compared to the end of 2023.

Social media discussion about Independent and 3rd party candidates: Share of Voice



Independent and 3rd party candidates Timelines

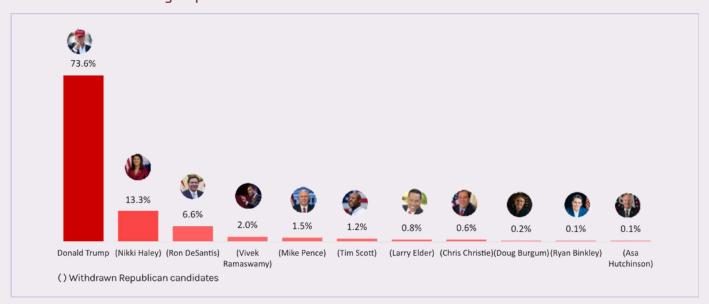


Robert F. Kennedy Jr. concentrates conversation peaks and perfectly masters the mechanics of social media by choosing controversial or sensitive subjects. He continues to disseminate many conspiracy or fanciful theories (vaccines, CIA, military-industrial lobbies, etc.) which allows him to benefit from very strong interactions on social media. Indeed, in Q1, he generated almost as much engagement as Joe Biden.

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Republican Candidates

Share of voice among Republican candidates



With 1.9M mentions in Q1, the volume of discussions on social media on Republican candidates decreased by 13% compared to Q4 2023, due in particular to:

- the withdrawal of all Trump's rivals (Vivek Ramaswamy, Nikki Haley, Ron DeSantis, Ryan Binkley, Chris Christie, and Asa Hutchinson)
- a drop in the number of messages about Election Fraud and Trump Indictments; but Trump's court cases continue to generate spikes in mentions.

Donald Trump alone has almost 74% of share of voice on social media, down 6 points. **Nikki Haley** was particularly visible in Q1, remaining Trump's only rival. She more than doubled her share of voice between Q4 2023 and Q1 2024.

Conversations about the Republican candidates mainly concerned events at the Mexican border, followed by the blocking of aid to Ukraine, their position on Gaza, Chinese imports, and the health of the US economy and its industries in particular. Criticism of "the Judges' relentlessness" towards Trump also featured strongly.

Donald Trump Timeline



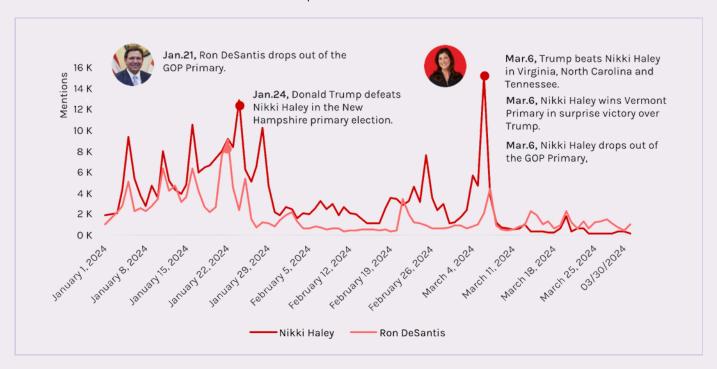


Republican Candidates

Timelines

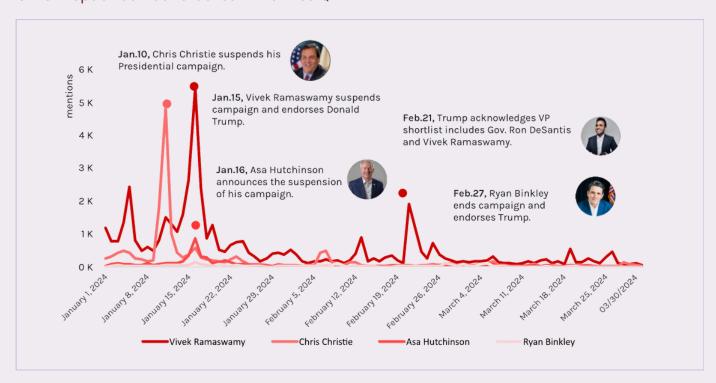
Between early January and Super Tuesday, all of Trump's remaining competitors dropped out of the race.

- Ron DeSantis dropped out on January 21, while Nikki Haley announced her withdrawal after Super Tuesday on March 6.
- While DeSantis reduced his visibility on social media by 14% between Q4 23 and Q1 24, Nikki Haley managed to multiply her share of voice by 2.1, representing an 81% increase in her volume of mentions. This makes her the 3rd most mentioned candidate on social media after Trump and Biden.



On social media, the other candidates were the talk of the town when they dropped out. With the exception of **Vivek Ramaswamy**, who had a high profile on social media (behind Haley and DeSantis), because of the TV debates and his stances on foreign policy and the climate.

Other Republican candidates' timelines Q4

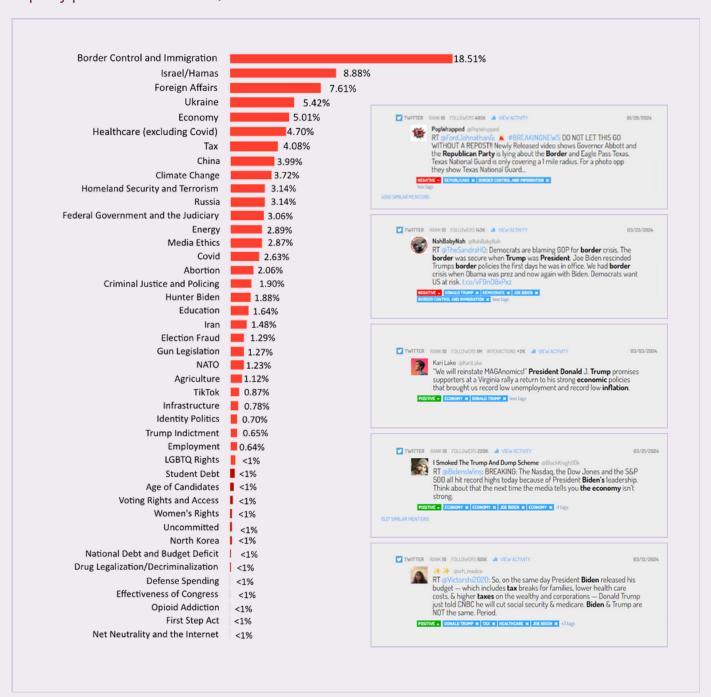




The hierarchy of the most discussed topics surrounding the elections has changed compared to Q4 2023:

- The share of discussions concerning Border Control and Immigration has risen from 10.7% to 18.51%. They reached their
 peak with the Mexican border crisis in January. There were many passionate discussions throughout the 1st quarter.
- Conversations on the Israel/Hamas war fell by 45% in volume, not because of any real lack of interest, but because the
 initial volume in Q4 2023 had reached a particularly high record level.
- However, Foreign Affairs in general has maintained a high ranking (3rd), while topics related to the Country's economic
 performance has gained 2 places. These 2 subjects often clash, with Republicans criticizing Biden for neglecting
 domestic issues in favor of foreign policy.
- The most notable progression in the Top 10 concerns conversations about Taxes, which move up from 14th to 5th place.
 Further down the ranking, we note the appearance of the theme linked to the 'Uncommitted' movement, which shows that the Israel/Hamas problem is an issue for some Democratic voters.
- NATO, TikTok, and gun legislation are the other topics of conversation that have progressed the most since Q4 2023.

Top key political issues in Q4



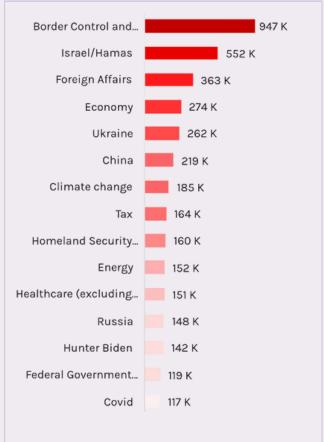




What are the key political issues being discussed about Presidential candidates Joe Biden and Donald Trump?



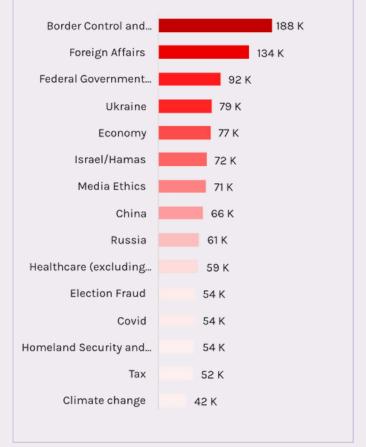
Most discussed issues about Joe Biden in number of mentions







Most discussed issues about Donald Trump in number of mentions





What sets Trump vs. Biden apart:

- Trump's judicial affairs are present in the top 15 through the topics Federal Government and the Judiciary (for Supreme Court decisions in particular) and Election Fraud.
- Another difference is with 'Media Ethics' in 7th position. The data shows the importance of criticizing the media and social media platforms as purveyors of disinformation and censors of Republican ideas from the point of view of the conversations of Trump supporters.
- Israel/Hamas is the 2nd most common subject associated with Biden even through the volume of conversations has dropped significantly.
- The **Economy** is now a major issue for both candidates which was not the case for Biden before he entered the campaign (11th place last year, 5th place in Q1).
- Climate Change is a campaign issue for Biden. On the side of Trump and his supporters, this is mainly expressed
 through attacks on environmental regulations and the development of electric cars and trucks, and on the preservation
 of the car industry to produce petrol cars.



'Uncommitted' Mentions

723K

From January

People Talking about 'Uncommitted' + Votes

423K

From January

The 'Uncommitted' movement is gaining momentum on social media since mid-February, in Michigan, which is a key battleground state and home to one of the largest Arab American populations in the country. The campaign is growing to vote "uncommitted" in the state's Democratic Primary, in protest of Biden's policies backing Israel. The peak of mentions was on polling day in Michigan, February 27 followed by two peaks around Super Tuesday.

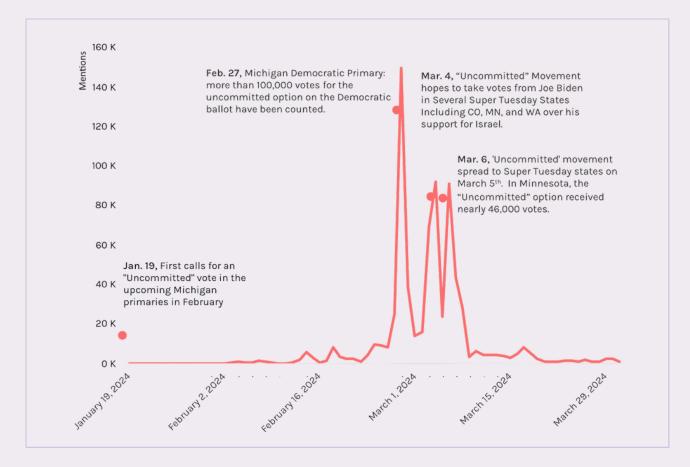
But the call for an 'Uncommitted' vote from Democrat voters goes back to January on X (formerly Twitter) in particular. The messages were posted and relayed well beyond the Arab-Muslim community, with politicians, actors, and ordinary citizens all taking part in the campaign.

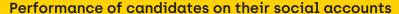














Here we examine Owned media, i.e., the performance of candidates on their campaign social accounts: X (formerly Twitter), TikTok, YouTube, Facebook, Instagram. We compare three candidates: Joe Biden (candidate accounts), Donald Trump, and Robert F. Kennedy Jr. over the period Q1 2024.

Community

Biden has the largest community on social media (67.8M) with 56% of his followers on X (formerly Twitter) followed by Instagram (25%).

Not far behind, Donald Trump has 63.7M subscribers and a majority of fans on Facebook (55%) then Instagram (38%). Robert Kennedy Jr. has a smaller community and does not benefit from the seniority and presidential reputation of the other two candidates. His fans are evenly split between X (formerly Twitter), Instagram, and TikTok. This social media gives him a good dynamic, enabling him to post strong growth of 25% compared with Q4 2023.

	Community Fans, Followers, Subscribers		interactions Like, Reposts, Comments		Publications Posts, Videos, Tweets	
	Total	Growth	Total	Growth	Total	Growth
Donald Trump	63.72M	1%	57.15M	90%	944	128%
Joe Biden	67.87M	1%	28.41M	100%	744	126%
Robert Kennedy Jr.	6.45M	25%	24.25M	115%	1.17K	37%

Interactions

With a community one-tenth the size of his two rivals, RFK Jr. has managed to generate a volume of interactions (likes, shares, comments, excluding views of YouTube videos, and TikTok) quite similar to that of Joe Biden. Two factors explain this:

- his TikTok and Instagram posts, which generate very good engagement
- the nature of his often polemical, even conspiracy-themed comments on the war in Ukraine, lockdowns, vaccines, and industrial lobbies.

Donald Trump, meanwhile, generates 92% of his engagement on Instagram mainly through posts making fun of Joe Biden. In Q1, he generated more than 52 million interactions on Instagram. Joe Biden's engagement is more evenly split between Instagram (55%) and X (formerly Twitter) with 39% of interactions. His non-polemical and never satirical publications engage less on average per post than those of Donald Trump, but more than those of RFK Jr.

RFK Jr. posted the most engaging post of the period of all candidates combined on TikTok, on March 8th "<u>How I see the State of Our Union. #SOTU #Kennedy24</u>" which generated over 1.7M interactions (likes, comments, and shares)

	Average # of Interactions Q1 2024
Donald Trump	60,540
Joe Biden	38,185
Robert Kennedy Jr.	20,726



AP Planner Events

These are a sampling of events directly from the AP Planner related to the candidates and issues covered in the 2024 US Presidential Election media stories.

Presidential El	ection media stories.
5/1/2024	 Florida six-week abortion ban takes effect. Lawmakers included the ban in a bill passed last year but required the state Supreme Court to overturn its previous precedent on abortion
5/7/2024	Indiana presidential primary election * Ahead of the 5 Nov presidential election
5/7/2024	 Final Mexican presidential race debate, with candidates Claudia Sheinbaum, Xóchitl Gálvez, and Jorge Álvarez Máynez participating face-to-face under the theme of 'Democracy and Governments: Construct Dialogues'. Topics include security and organized crime, migration and foreign affairs, democracy, pluralism, and the division of powers
5/14/2024	 Presidential primary elections held in Maryland, Nebraska, and West Virginia * Ahead of the 5 Nov presidential election
5/15/2024	 Protests expected on Nakba Day, aka Palestinian 'Day of the Catastrophe', observed annually by Palestinians to recognize the day after the Israeli Declaration of Independence in 1948
5/21/2024	• Presidential primary elections held in Kentucky and Oregon * Ahead of the 5 Nov presidential election
5/18/2024	 NRA-ILA Leadership Forum, held as part of NRA's annual meeting and exhibits. Past speakers include Republican presidential candidate former President Donald Trump
5/23/2024	 2024 Libertarian National Convention, to conduct Officer and Board elections, and select a presidential and vice- presidential candidate. This year's theme is 'Become UnGovernable'
6/2/2024	 Mexico presidential, senate and parliamentary elections. Presidential race sees former Mexico City Head of Government Claudia Sheinbaum - nominated by MORENA, the party of outgoing President Andrés Manuel López Obrador- face off against opposition candidate Xóchitl Gálvez
6/4/2024	 Presidential primary elections held in Washington, DC, Montana, New Jersey, New Mexico, and South Dakota * Ahead of the 5 Nov presidential election
6/13/2024	 G7 Summit begins, hosted by Italian Prime Minister Giorgia Meloni and attended by leaders of the other G7 member nations, including President Joe Biden
6/14/2024	 Turning Point Action Conference begins, titled 'The People's Convention' and bringing together conservative voices. Speakers include Republican presidential candidate former President Donald Trump
6/14/2024	Donald Trump's birthday (78)
6/24/2024	 2nd anniversary of U.S. Supreme Court issuing its opinion in 'Dobbs v. Jackson Women's Health Organization' and deciding that the right to an abortion is not constitutionally protected, thus overturning its previous decisions in 'Roe v. Wade' (1973) and also 'Planned Parenthood v. Casey' (1992)
6/27/2024	• CNN hosts first presidential debate between President Joe Biden and former President Donald Trump in Atlanta
6/28/2024	National Right to Life Convention
7/9/2024	NATO Heads of State and Government meeting begins. President Joe Biden hosts * This year's summit marks the alliance's 75th anniversary
7/11/2024	Green Party of the United States Annual National Meeting and Presidential Nominating Convention
7/15/2024	July quarterly campaign finance report filing deadline for presidential campaigns
7/15/2024	2024 Republican National Convention
8/8/2024	The Gathering 2024, hosted by talk radio host Erick Erickson
8/19/2024	2024 Democratic National Convention
9/10/2024	ABC hosts second presidential debate between President Joe Biden and former President Donald Trump
9/17/2024	National Voter Registration Day
10/24/2024	Pre-general election campaign finance report filing deadline for presidential campaigns
11/5/2024	Election day
11/20/2024	Joe Biden's birthday (82)







Brand Sentiment ♥

Company sentiment based on online news articles and/or blog posts contributed by or written about the company.

Impact Score 🕜

The Impact Score is a qualitative article metric that combines the "three Rs" (relevance, reputation, repetition) and sentiment into a single measurement that allows quick benchmarking for both competitive and non-competitive scenarios alike.

Amplification 4:

Social media shares of earned, owned and newswire coverage from Facebook, X (formerly Twitter) and Pinterest.

Share of Voice (Quantity) 4)

The volume of coverage that mentions each candidate or issue. SOV is to be used to compare articles by and about your company versus articles by and about your competitors.

Onclusive Prove and Improve Your Value



To find out how Onclusive can help you measure the media impact of your brand and competitive landscape, get in touch with us today

Get in Touch

About Onclusive

Onclusive is a world leader in media intelligence technology and services, dedicated to supporting PR, Communications and Marketing professionals. We deliver leading-edge innovation, human expertise, and unmatched media reach in a suite of media management, monitoring and analysis solutions that support every stage of the communications cycle. Our unified platform and services enable our customers to make fast, accurate, data-driven decisions about their communications and marketing strategies, allowing them to prove and improve their value.