

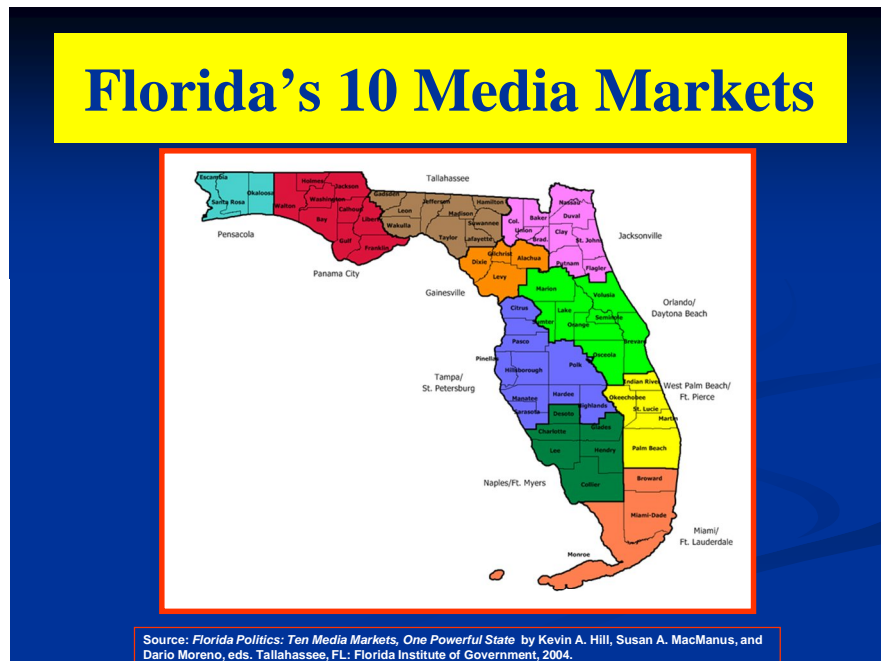
VOTER DEMOGRAPHICS: FLORIDA REGISTRATION AND VOTING PATTERNS BY MEDIA MARKET

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Candidates and political parties devise their overall advertising and candidate visit plans in Florida by media market. The number of registered voters in the state's 10 media markets varies considerably, as do party composition and past voting patterns.¹

Media market-based strategies have been a critical element of the 2008 presidential campaign, particularly since surveys show that more voters pay attention to (and trust) local coverage of candidates and campaigns than national coverage. Candidates have found it particularly advantageous to be interviewed by local news anchors and reporters in the state's key media markets.

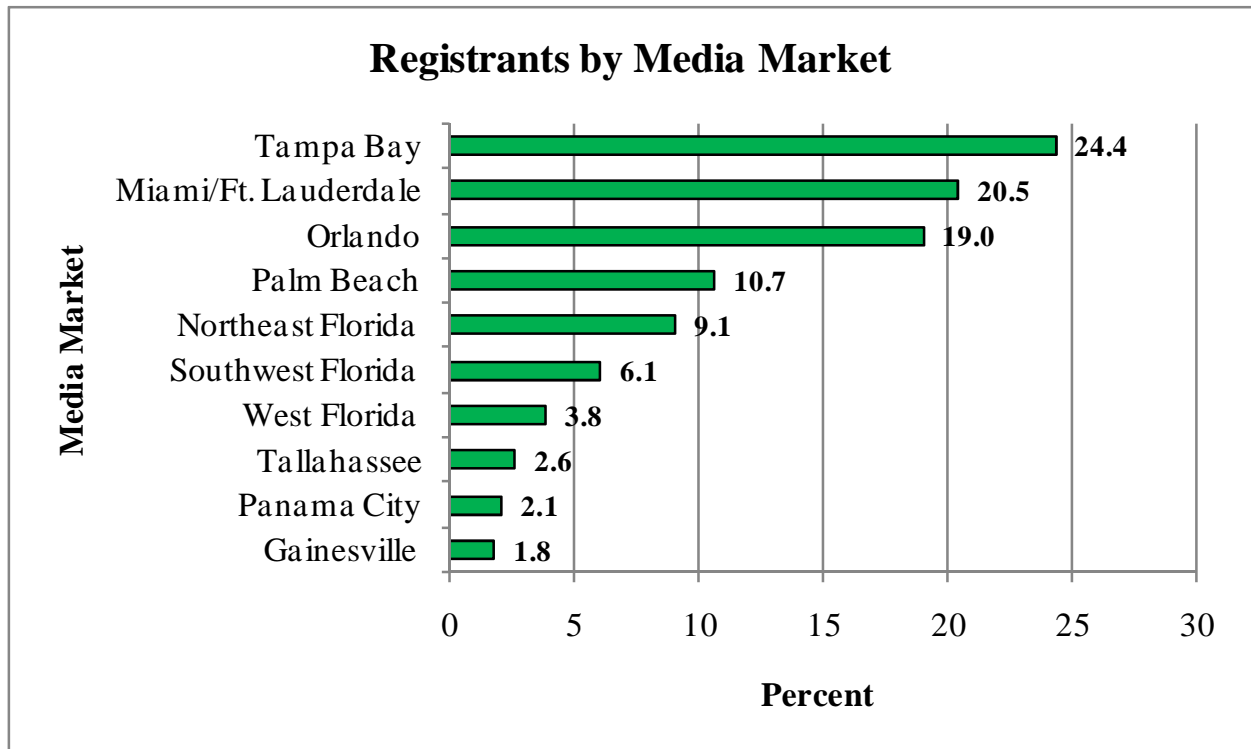


An Overview of Florida's Media Markets

¹ See Kevin A. Hill, Susan A. MacManus, and Dario Moreno, eds., Florida's Politics: Ten Media Markets, One Powerful State. Tallahassee, FL: Florida Institute of Government, 2004.

To political strategists, the most important statistic is the number of registered voters in each market. The Tampa Bay media market, the state’s largest, contains nearly one-fourth of all Florida’s registered voters (Figure 2). In the critical I-4 corridor—the Tampa Bay and Orlando markets combined—live over 43% of the state’s voters, making the state’s famous “highway to political heaven” a must area for television advertising and presidential candidate visits. What is surprising to many is that there are considerably more registered voters in the central Florida (Tampa Bay and Orlando) than in the combined southeast Florida (Miami/Ft. Lauderdale + Palm Beach) markets—43.4% v. 31.2%.

Figure 2. Registered Voters in Each Florida Media Market: 2008



Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date - October 6, 2008.

Media Market Voting Patterns: 2004 Presidential Election

Voting patterns differ considerably by media market (Table 1). The demographic makeup of some markets has undoubtedly changed since the 2004 presidential race. Nonetheless, it is informative to look at the areas where Democratic and Republican candidates fared best. Republicans Bush/Cheney garnered the most votes in the panhandle (West Florida, Panama City, Northeast Florida) and southwest Florida markets, while Democrats Kerry/Edwards were most successful in college-dominated markets (Gainesville, Tallahassee) and in south Florida (Palm Beach and

Miami/Ft. Lauderdale). The bellwether Orlando and Tampa markets swung toward the winner (Bush/Cheney).

Table 1. Presidential Vote by Media Market 2004

Media Market	Bush / Cheney (REP) (%)	Kerry / Edwards (DEM) (%)	All Other (%)
West Florida	71.7	27.4	0.9
Panama City	69.4	29.8	0.8
Northeast Florida	62.5	36.8	0.7
Southwest Florida	60.5	38.4	1.1
Orlando	54.2	45.1	0.7
Tampa Bay	53.7	45.4	0.9
Gainesville	47.8	51.3	0.9
Palm Beach	43.7	55.6	0.7
Tallahassee	43.2	56.2	0.7
Miami/Ft. Lauderdale	41.1	58.1	0.8
Florida At Large	52.1	47.1	0.8

Note: Media markets in descending order of percent received by the winner (Bush/Cheney).

Source: Calculated from data provided by the Florida Division of Elections.

The Bush/Cheney ticket drew 45% of all its votes from the I-4 corridor markets while Kerry/Edwards got 41.8% (Table 2). What is even more striking is that the difference in the share each ticket generated from the Tampa and Orlando markets respectively was identical—1.6%. Third party candidates also generated nearly half (44.4%) of their votes from the two I-4 Corridor markets.

Table 2. Percent of Each Presidential Candidate's Total Vote from Each Media Market, 2004

Media Market	Bush / Cheney (REP) (%)	Kerry / Edwards (DEM) (%)	All Other (%)
Tampa Bay	25.2	23.6	27.9
Orlando	19.8	18.2	16.5

Miami/Ft. Lauderdale	15.8	24.6	20.5
Northeast Florida	11.1	7.2	7.5
Palm Beach	8.7	12.3	8.7
Southwest Florida	7.2	5.1	8.2
West Florida	5.4	2.3	4.3
Panama City	2.8	1.3	2.0
Tallahassee	2.4	3.4	2.3
Gainesville	1.7	2.0	2.2
Florida At Large	100.0	100.0	100.0

Note: Media markets in descending order of percent received by the winner (Bush/Cheney).

Source: Calculated from data provided by the Florida Division of Elections.

Party Registration Breakdowns by Media Market: 2008

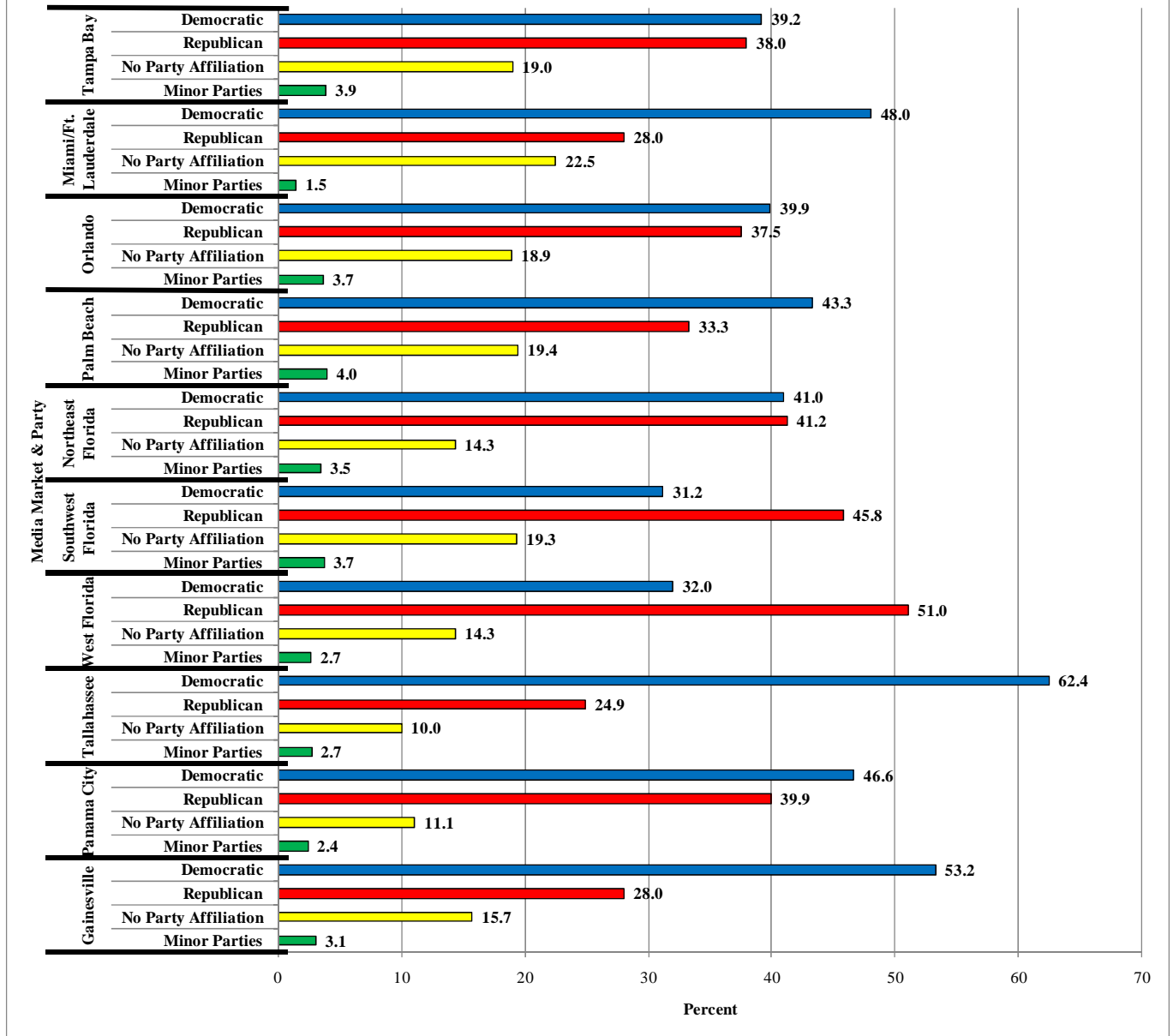
In 2008, Democrats make up the majority of registrants in the Tallahassee (62.4%) and Gainesville (53.2%) markets, Republicans in West Florida (51%). (See Figure 3.) Democrats comprise a large plurality of registrants in the Miami/Ft. Lauderdale (48% to 28%), Palm Beach (43.3% to 33.3%), and Panama City (46.6% to 39.9%) markets, Republicans in Southwest Florida (45.8% to 31.2%). The Northeast Florida, Tampa Bay, and Orlando media markets are the most evenly split between Democrats and Republicans.

The Miami/Ft. Lauderdale market has the highest percentage of independents (No Party Affiliation)—22.5%, followed by Palm Beach—19.4%, Southwest Florida—19.3%, Tampa Bay—19.0%, and Orlando—18.9%.

The Palm Beach (4.0%), Tampa Bay (3.9%), Orlando (3.7%), Southwest (3.7%), Northeast Florida (3.5%), Gainesville (3.1%) have the largest proportions of minor party registrants (Libertarian, Green, and others).

Figure 3. Political Party Composition of Each Media Market, 2008

Media Markets' Registrants by Party



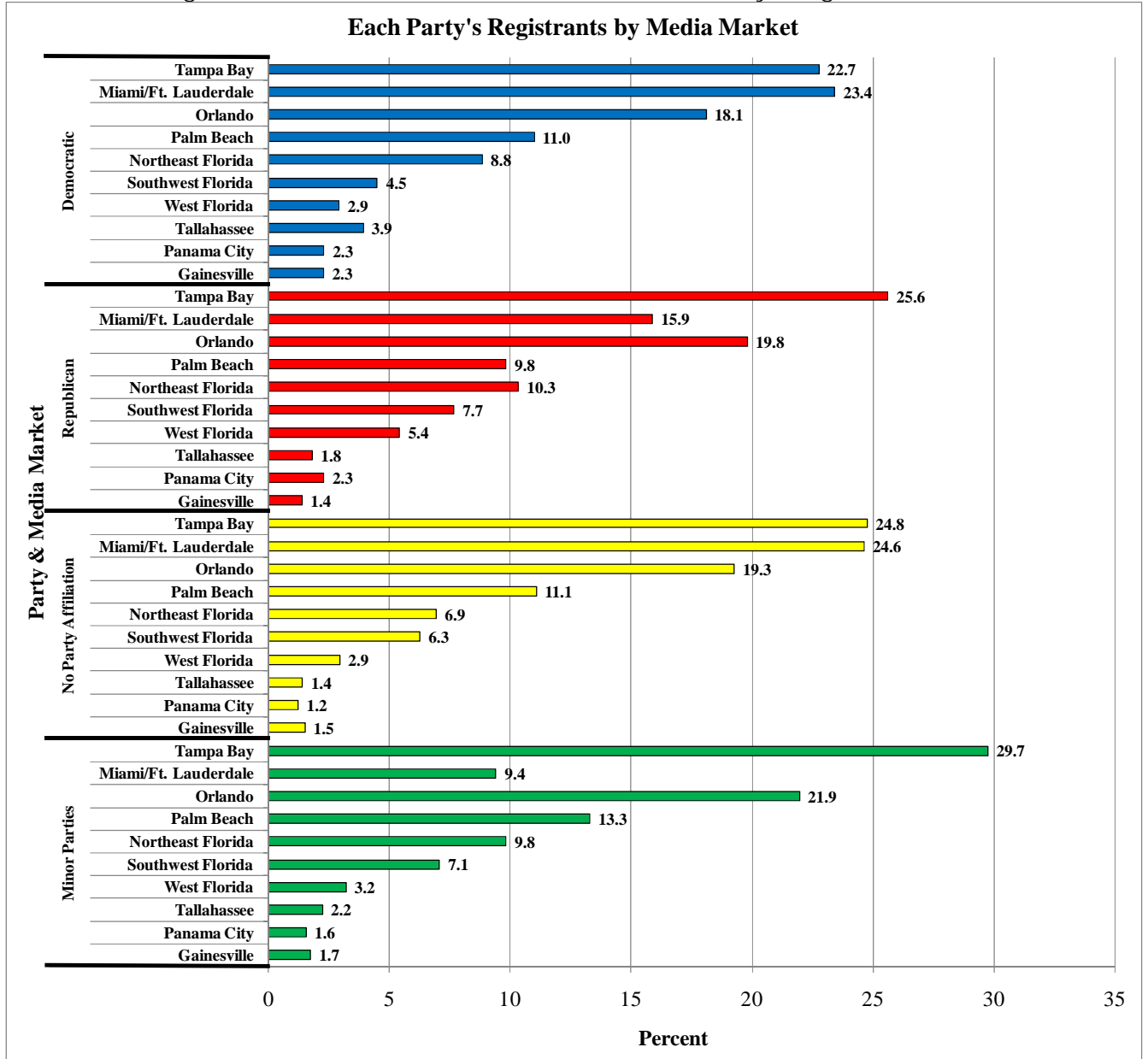
Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date - October 6, 2008.

The Florida Democratic Party draws nearly half (46.1%) of its registrants from the Tampa Bay and Miami/Ft. Lauderdale media markets (Figure 4.) Of the state's registered Republicans, 45.4% live in the Tampa Bay (25.6%) and Orlando (19.8%) media markets.

Nearly half (49.4%) of the state’s true independents (registered with No Party Affiliation) are concentrated in two large markets—Tampa Bay (24.8%) and Miami/Ft. Lauderdale (24.6%).

Over half (51.6%) of those registered with a minor political party reside in either the Tampa Bay (29.7%) or Orlando (21.9%) markets.

Figure 4. Media Market Location of Each Political Party's Registrants

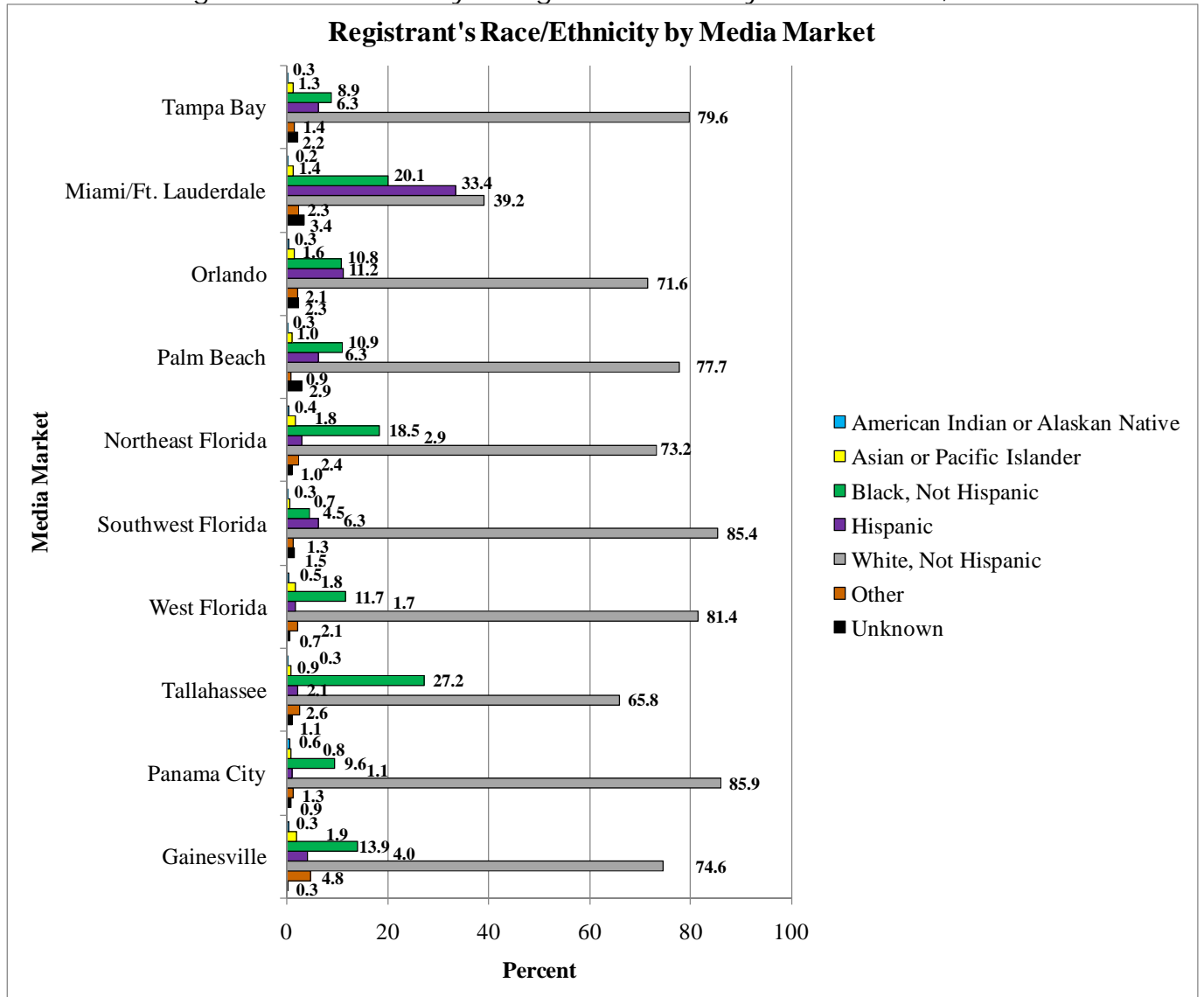


Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date, October 6, 2008.

Racial/Ethnic Makeup of Registrants in Each Media Market, 2008

Racial/ethnic composition data as of book closing (October 6, 2008) reveal significant differences in the makeup of Florida’s media markets (Figure 5). This information has been key to microtargeting efforts, especially in the use of electronic media—radio and cable television—and direct mail.

Figure 5. Race/Ethnicity of Registered Voters by Media Market, 2008



Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date – October 6, 2008.

As of the October 6, 2008 book closing, the racial/ethnic breakdown of Florida’s registered voters was white, not Hispanic—69.1%; black, not Hispanic—13.1%; Hispanic—12.0%; Asian—1.3%; American Indian/Alaskan Native—0.3%; Other— 1.9%, and Unknown—2.2%. With the Unknowns (not reported) removed, the breakdown is white,

not Hispanic—70.7%; black, not Hispanic—13.4%; Hispanic—12.3%; Asian—1.4%; American Indian/Alaskan Native—0.3%; and Other— 1.9%.

The Miami/Ft. Lauderdale market is by far the state’s most diverse (Figure 5). In that market, whites make up 39.2% of the registered voters, Hispanics—33.4%, blacks—20.1%, Asians—1.4%, and American Indians—0.2%.

The Panama City and Southwest Florida markets are the least diverse. Whites comprise 85.9% of the Panama City market’s registered voters, 85.4% of the Southwest Florida market.

The Orlando media market is the most representative of the state’s overall racial/ethnic composition: white (71.6%); black, not Hispanic (10.8%); Hispanic (11.2%); Asian (1.6%); and Native American (0.2%).

White (Not Hispanic) Registrants by Media Market

Whites make up a majority of all media markets except Miami/Ft. Lauderdale (Figure 6). They comprise over 80% of the Panama City, Southwest Florida, and West Florida markets. These markets are among the state’s most solidly Republican. A plurality of Florida’s white registrants (43%) are Republican, 35% are Democrats, 17% are no party affiliation, and 5% are affiliated with a minor party.²

Black (Not Hispanic) Registrants by Media Market

The Tallahassee and Miami/Ft. Lauderdale markets have the largest shares of African-American registrants (Figure 7): 27.2% and 20.1% respectively. The smallest pools of black registrants are in the Southwest Florida (4.5%), and Tampa Bay (8.9%) media markets. African American voters are heavily Democratic in their party affiliation (81%).³

Hispanic Registrants by Media Market

The two media markets with the largest share of Hispanic registrants are Miami/Ft. Lauderdale—33.4% and Orlando—11.2%. (See Figure 8.) The smallest shares are in the Panhandle media markets—Panama City, West Florida, Tallahassee, and Northeast Florida. Hispanics are nearly evenly divided in their party preferences between Democrats and Republicans, although Hispanic Democrats (37%) slightly outnumber Republican Hispanics (33%).⁴

Asian Registrants by Media Market

² September 19, 2008 data.

³ September 19, 2008 data.

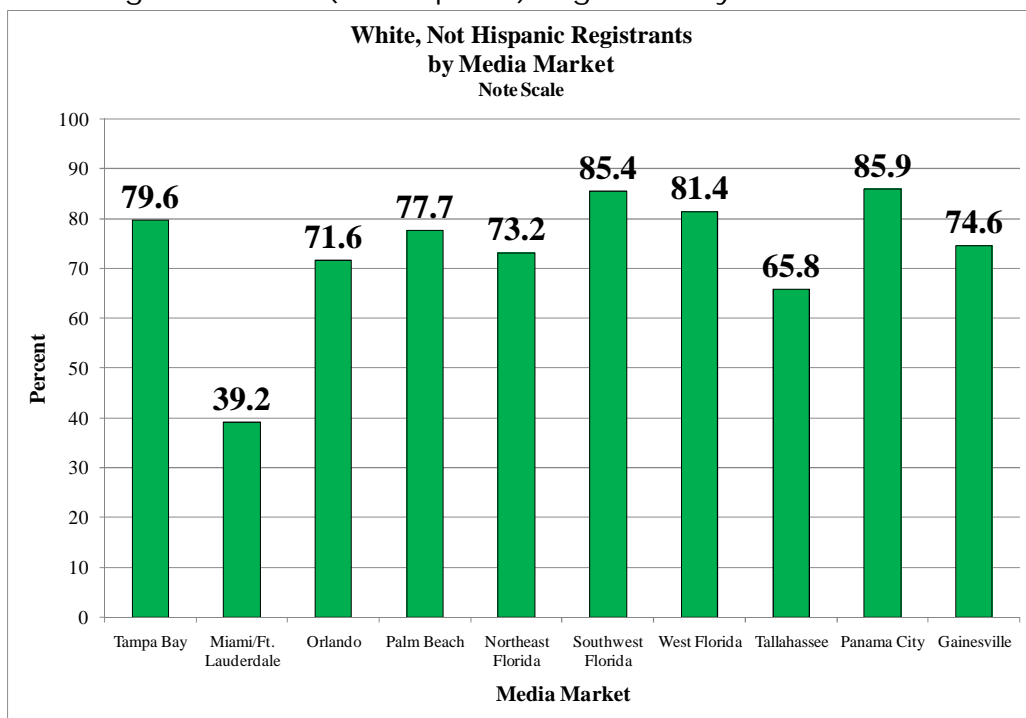
⁴ September 19, 2008 data.

There is less variation in the Asian makeup of each media market's registrants (Figure 9). However, the largest shares are found in the Gainesville (1.9%), Northeast (1.8%), and West Florida (1.8%) markets. (See Figure 9.) Asian Americans make up the smallest percent of the registrants in the Southwest Florida (0.7%), Panama City (0.8%), and Tallahassee (0.9%) markets. Asian Americans are more independent in their party preferences than other racial/ethnic groups. A plurality of Florida's Asian Americans are registered as having no party affiliation (33.6%), while 32% register as Democrats and 30.3% as Republicans.⁵

American Indian/Alaskan Native Registrants by Media Market

Native Americans make up less than 0.5% of each media market's registered voters with the exception of the Panama City (0.6%) and West Florida (0.5%) areas (Figure 10). Among Florida's American Indian (Native American) population, there are more Democrats (40.5%) than Republicans (32.5%), reflecting gains since 2006. But a sizable number of Native Americans are also independents (22.7%).⁶

Figure 6. White (Not Hispanic) Registrants by Media Market

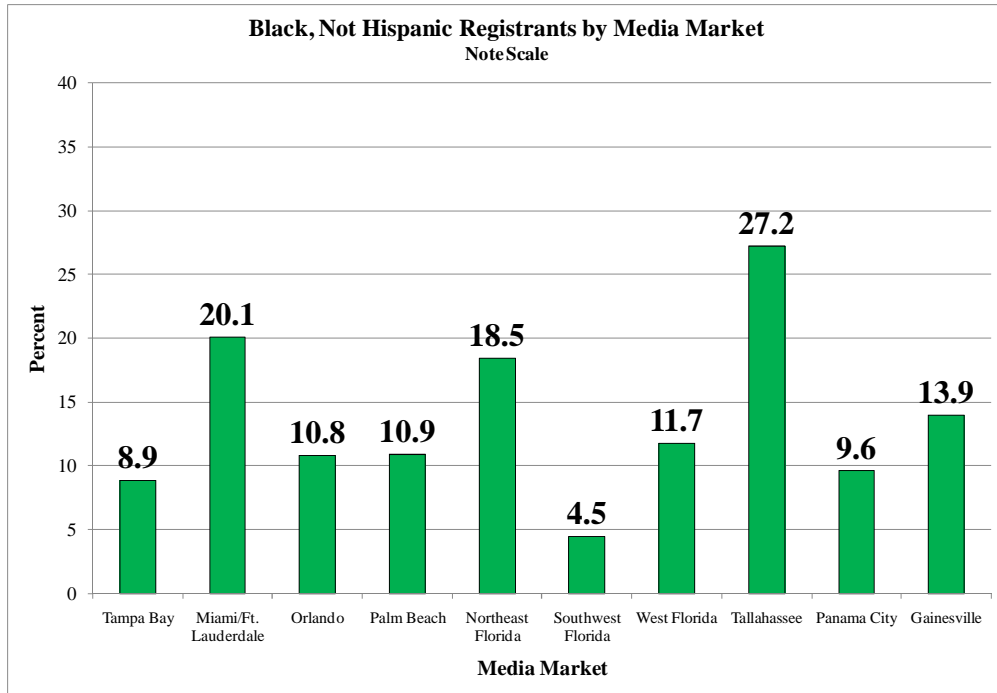


Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date - October 6, 2008.

⁵ September 19, 2008 data.

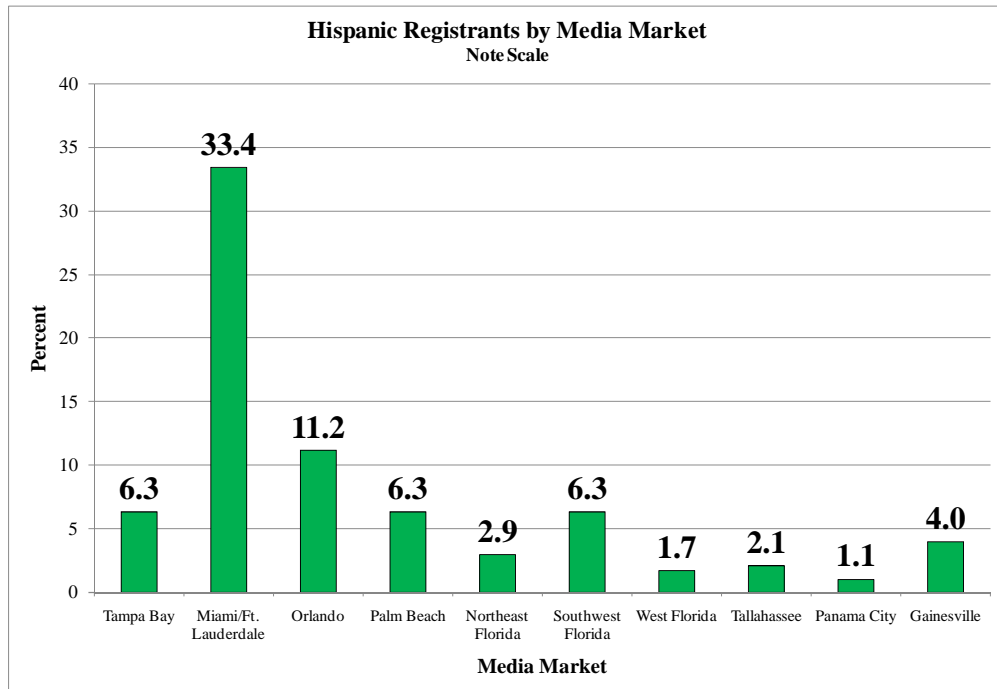
⁶ September 19, 2008 data.

Figure 7. Black (Not Hispanic) Registrants by Media Market



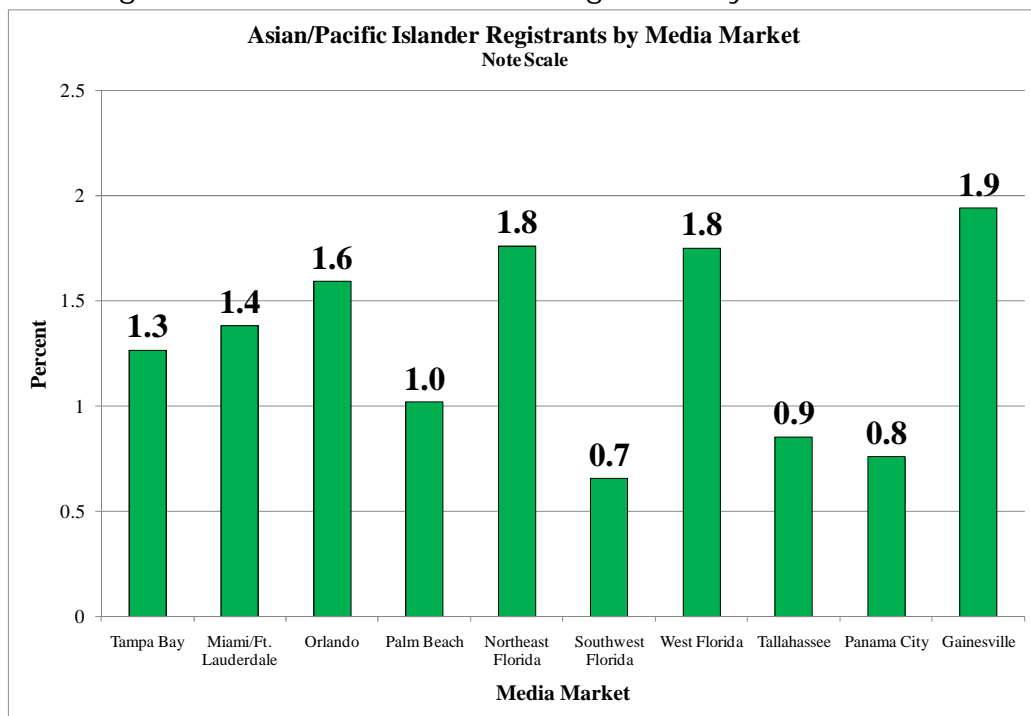
Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date – October 6, 2008.

Figure 8. Hispanic Registrants by Media Market



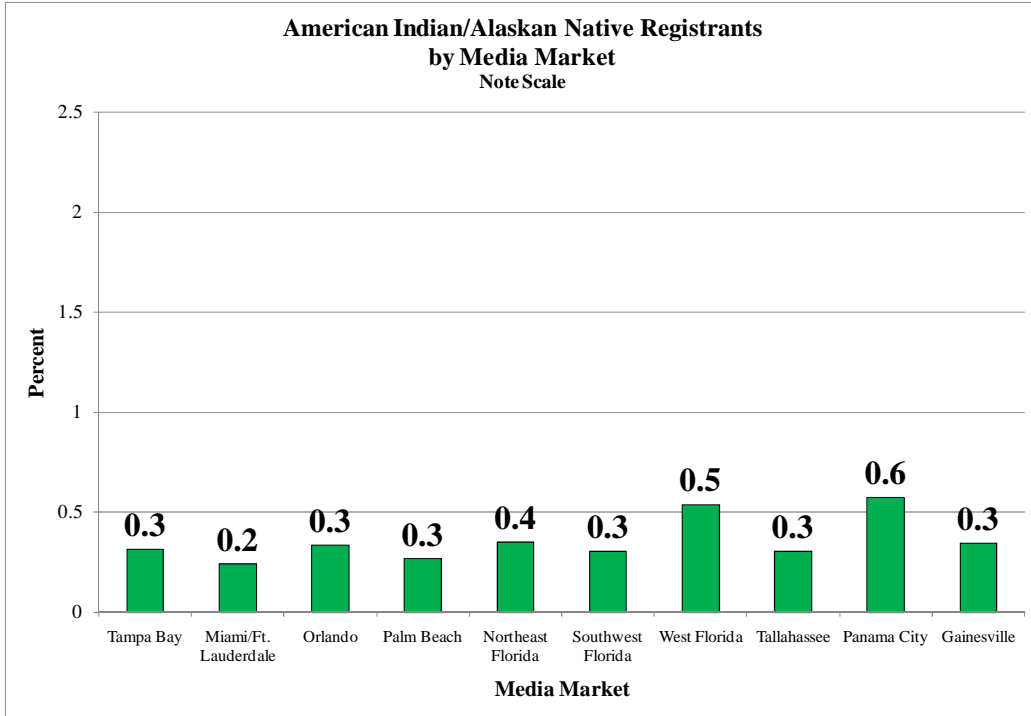
Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date – October 6, 2008.

Figure 9. Asian/Pacific Islander Registrants by Media Market



Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date – October 6, 2008.

Figure 10. American Indian/Alaskan Native Registrants by Media Market



Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date – October 6, 2008.

Looking at the data somewhat differently, a majority (59.8%) of Florida’s white registrants live in three media markets—Tampa Bay, Orlando, and Palm Beach (Table 2). Over 60% (63.8%) of the state’s black registrants live in three markets—Miami/Ft. Lauderdale, Tampa Bay, and Orlando. A large majority (87.2%) of all Hispanic registrants resides in the Miami/Ft. Lauderdale, Orlando, and Tampa Bay markets. Asian/Pacific Islander registrants (66.7%) are clustered in the state’s large metropolitan markets—Tampa Bay, Orlando, and Miami/Ft. Lauderdale. Likewise, a majority (60.2%) of Native American registrants reside in the Tampa Bay, Orlando, and Miami/Ft. Lauderdale markets.

Table 2. Percent of Each Racial/Ethnic Group’s Registrants in Specific Media Markets

Media Market	American Indian or Alaskan Native (%)	Asian or Pacific Islander (%)	Black, Not Hispanic (%)	Hispanic (%)	White, Not Hispanic (%)
Tampa Bay	24.3	23.0	16.5	12.8	28.1
Miami/Ft. Lauderdale	15.7	21.1	31.5	56.8	11.6
Orlando	20.2	22.6	15.8	17.6	19.7
Palm Beach	9.0	8.1	8.9	5.6	12.0
Northeast Florida	10.1	11.9	12.8	2.2	9.6
Southwest Florida	5.8	3.0	2.1	3.2	7.5

West Florida	6.6	5.0	3.5	0.6	4.5
Tallahassee	2.6	1.7	5.5	0.5	2.5
Panama City	3.8	1.2	1.5	0.2	2.6
Gainesville	2.0	2.6	1.9	0.6	1.9
Florida At Large	100.0	100.0	100.0	100.0	100.0

Source: All figures are calculated from data from the Florida Division of Elections, Book Closing Date – October 6, 2008.

Candidate Visits and Television Ads: Florida Gets Big Share

From September through October 31, 2008, Democrats Barack Obama, Joe Biden and their spouses made 22 visits to Florida, second only to the number of visits they made to Ohio. Republicans John McCain, Sarah Palin, and Cindy McCain traveled to the sunshine state 17 times, third behind Pennsylvania and Ohio.⁷ There has been more parity in campaign visits than in campaign advertising.

Obama has outspent McCain by more than 3 to 1 on television campaign ads. From October 21-28, the Obama campaign (candidate and party committee) spent \$4.6 million in Florida alone, compared to the McCain campaign's \$1.4 million.⁸ Indicative of Florida's status as one of the nation's premier battleground states, five of the twenty media markets in the U.S. receiving the most television advertising in the period closely preceding the election are in Florida: Tampa #1; Orlando #3; Miami/Ft. Lauderdale #5; West Palm Beach #7; and Jacksonville #12.⁹

The Tampa and Orlando media markets (I-4 Corridor) rank first and second nationally for the number of ads run by the McCain campaign; Jacksonville ranks sixth.

The Tampa media market ranks second nationally for the number of ads aired by Obama; the West Palm Beach market ranks seventh and the Miami/Ft. Lauderdale market, eighth.

In the final days before November 4, both presidential campaigns will spend millions on last minute television advertising in the sunshine state. Obama, Biden, McCain, and Palin will each appear in Florida, three of the four along the I-4 Corridor.¹⁰

⁷ "The Campaign Travels," The Wall Street Journal Online, November 1, 2008.

⁸ TNS Media Intelligence/CMAG with analysis by the University of Wisconsin Advertising Project.

⁹ The total number of airings by candidate, party, group, and coordinated ads for the October 21-28, 2008 period were: Tampa (2,485); Orlando (2,138); Miami/Ft. Lauderdale (2,035); West Palm Beach (1,693); Jacksonville (1,460).

¹⁰ McCain made his last Florida appearances in Miami on November 2 and in Tampa on Monday, November 3. His running mate, Sarah Palin, appeared in New Port Richey and Polk City (Tampa Bay media market) and Ocala (Orlando media market) on Saturday, November 1. Joe Biden appeared in Gainesville, Tallahassee, and Daytona Beach (Orlando market) on

The I-4 Corridor (the Tampa Bay and Orlando media markets combined) remains the most important piece of political real estate in this key battleground state.

Sources:

Kevin Hill, Susan A. MacManus, and Dario Moreno, eds. and contributors, *Florida Politics: Ten Media Markets, One Powerful State*. Tallahassee, FL: Florida Institute of Government, 2004.

Susan A. MacManus and Cal Everett, "Highway to Heaven: The Political Evolution of Florida's I-4 Corridor," paper presented at the 16th Biennial Citadel Symposium on Southern Politics, Charleston, SC, March 2-3, 2006.

Susan A. MacManus (with the assistance of David J. Bonanza), "Voter Demographics: Florida's Racial/Ethnic Mix Mirrors the Nation," featured column, *sayfiereview.com*, September 24, 2008.

Sunday, November 2. Obama made his final appearance in Florida in Jacksonville on Monday, November 3.