



THE LOCAL VOTE 2016

ISSUES IN FOCUS

ROAD TO THE
APRIL 26TH
CONTESTS



COURTING THE ISSUE VOTER

It seems like a lifetime ago when on the evening of the Iowa caucus, fifteen candidates made their formal bids to be the next President. That group now stands at five. As we turn our attention toward the final stretch of the 2016 primary season, one thing is abundantly clear: **voters are paying closer attention to where the remaining candidates stand on key issues.** Many will be casting their ballots based on how closely the candidate's views match their own. With a large chunk of the electorate still undecided on whom they are voting for in the upcoming primaries, a candidate's stance on an issue could mean the difference between winning and losing.

The Local Vote 2016 continues to unearth important insights to help candidates and political strategists effectively use media to engage local electorates. In this fourth report, we shine the spotlight on **Pennsylvania**. Many East Coast states are having primaries on April 26, as Connecticut, Maryland, Delaware and Rhode Island are all in contention. With delegates at a premium, the Keystone State will be the big prize.

MEDIA INSIGHTS BY KEY ISSUES

- Across the 10 states that Katz Radio Group has studied to date, the three most important issues that primary-goers say influence their choice of Presidential candidate are: **The Economy, Healthcare and National Security.** (38%, 37%, 35%)
- There are big differences in how issues rank depending on party affiliation: **Healthcare** is the most important issue among Democratic primary-goers, while **National Security** leads among Republicans.
- Radio is used by more primary-goers than any other media platform, regardless of what issues they deem important.
- Primary-goers that listen to **News/Talk/Sports** stations are more concerned about the issues of National Security (+9%), Immigration (+13%) and Government Spending (+10%) than the average primary-goer.
- Primary-goers that listen to **Urban** Radio stations are more likely to be influenced by the issues of Jobs and Race Relations when picking a Presidential candidate. (2 and 3 times more than the average primary-goer).
- Those who say the issue of **The Economy** impacts their vote have a higher propensity to listen to Rock (+8%), Contemporary Hits (+7%) and Hispanic Radio (+17%) formats than the average primary-goer.
- Those who say **Healthcare** impacts their vote are more likely to listen to Contemporary Hits (+10%), Classic Hits (+9%) and Urban (+26%) formats.

PENNSYLVANIA INSIGHTS

- 4 out of 10 eligible Pennsylvania voters are undecided about their choice of candidate or whether they will go to the polls on April 26. This large share of the electorate (called the “**Opportunity Vote**”) is primed for political messaging.
- Early polling in Pennsylvania shows Bernie Sanders and Donald Trump with small leads in their respective races, but 35% of likely primary-goers are still undecided on whom they will cast a ballot for. When prompted to make an immediate decision, these Undecideds are favoring Hillary Clinton and Donald Trump.
- Nearly every Opportunity Voter in Pennsylvania listens to Radio (95%), a greater percentage than Cable TV (89%) and Broadcast TV (86%).
- Opportunity Voters listen to Radio for 2 hours during the average day.

ABOUT THE LOCAL VOTE 2016 INITIATIVE

Katz Radio Group has commissioned Nielsen to survey a representative sample of registered voters across 10 states in the weeks leading up to their 2016 Presidential primary elections. Respondents had previously participated in a Scarborough study. Scarborough is a division of Nielsen that collects behavioral insights on U.S. consumers locally, regionally and nationally. Each year Scarborough surveys more than 200,000 consumers (80% of which are registered voters) using high quality samples that are reliably projectable to the U.S. Adult 18+ population.

The results of this re-contact study, which are specific to voters’ opinions on the 2016 Presidential election, are tied back to the respondents’ Scarborough data including their demographic profile and media consumption. Wave 1 data represents 1,007 registered voters across the states of Colorado (251), Texas (503) and Virginia (254) interviewed January 25 – February 5, 2016. Wave 2 data represents 2,000 registered voters across the states of Florida (500), Illinois (250), Missouri (250), North Carolina (500) and Ohio (499) interviewed February 11 – 22, 2016. Wave 3 data represents 350 registered voters in Wisconsin interviewed March 7 – 10, 2016. Wave 4 data represents 351 registered voters in Pennsylvania interviewed March 28 – April 5, 2016.

PULSE OF THE ELECTORATE



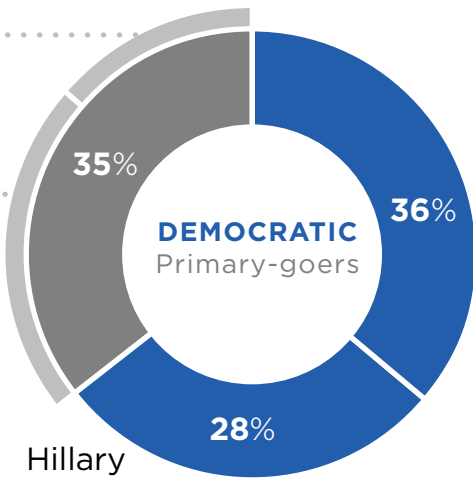
While Bernie Sanders and Donald Trump have small leads, 35% of primary-goers are still undecided on whom they are voting for. When prompted to make an immediate decision, these Undecideds are favoring Hillary Clinton and Donald Trump.

Undecided

but if they had to choose today

38%
Bernie Sanders

62%
Hillary Clinton



Bernie Sanders

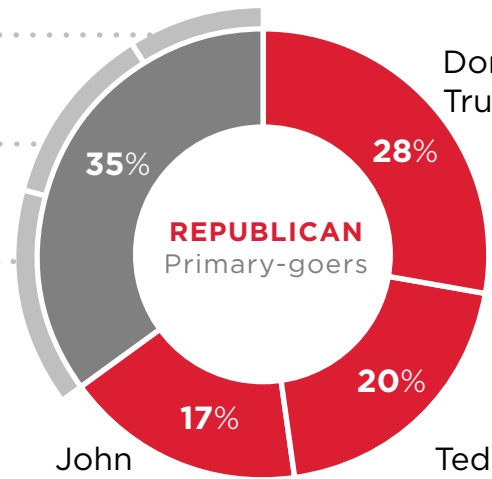
Undecided

but if they had to choose today

25%
Ted Cruz

34%
John Kasich

41%
Donald Trump



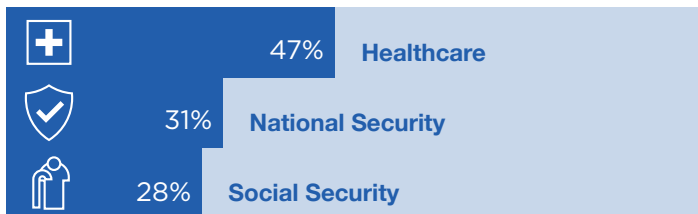
Donald Trump

John Kasich

Ted Cruz

Pennsylvania Democrats are keenly focused on Healthcare when picking a Presidential candidate, while Republicans are more likely to consider National Security.

Registered Democrats



Registered Republicans



Q: What candidate do you plan to vote for in the upcoming primary election?
Q: What candidate would you choose if you had to vote today? (if undecided)

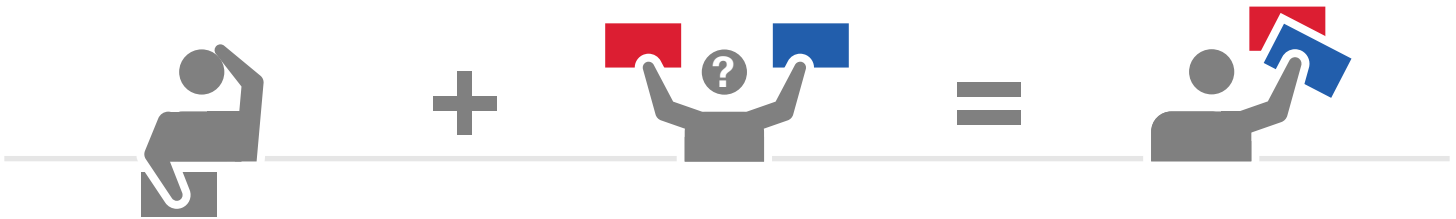
Q: Below is a list of issues facing our nation. Select the top 3 issues that would most influence who you vote for in the Presidential election.

Source: The Local Vote 2016. Katz Media Group/Nielsen study of 351 registered voters in Pennsylvania. Interviews conducted March 28 to April 5, 2016. Margins of error: +/- 8.3 percentage points for Democratic race and +/- 8.5 for Republican race.

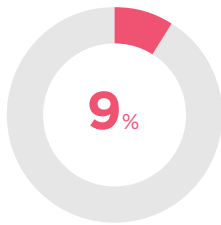
THE OPPORTUNITY VOTE



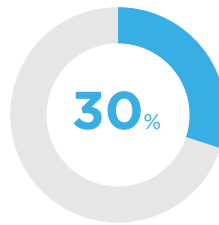
Getting Pennsylvania voters to turn out and influencing those who are undecided are critical goals for political campaigns



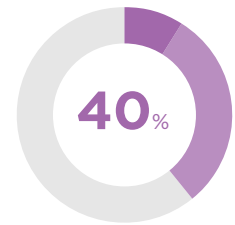
The **Turnout** Vote
Percentage of eligible voters who have yet to decide if they are voting in the primaries



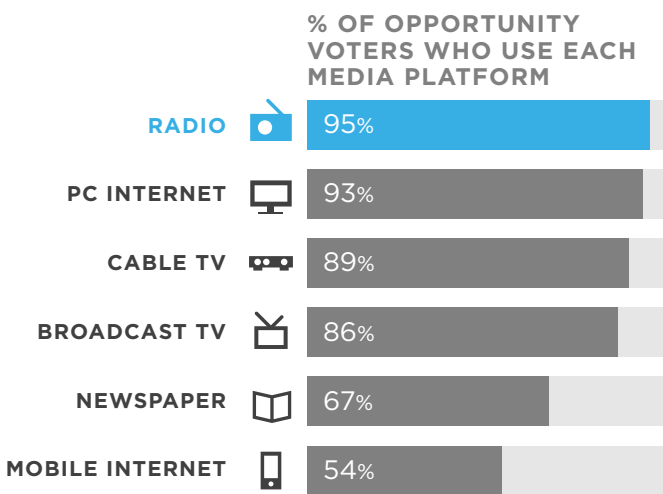
The **Undecided** Vote
Percentage of eligible voters who are attending the primaries, but are undecided on a candidate



The **Opportunity** Vote
Percentage of eligible voters who are unsure if they are going to vote -or- do plan to vote, but are undecided on a candidate



Radio is listened to by a **clear majority** of Pennsylvania Opportunity Voters



2 Hrs 5 Mins

Amount of time in the **average day** that Opportunity Voters **listen to Radio**

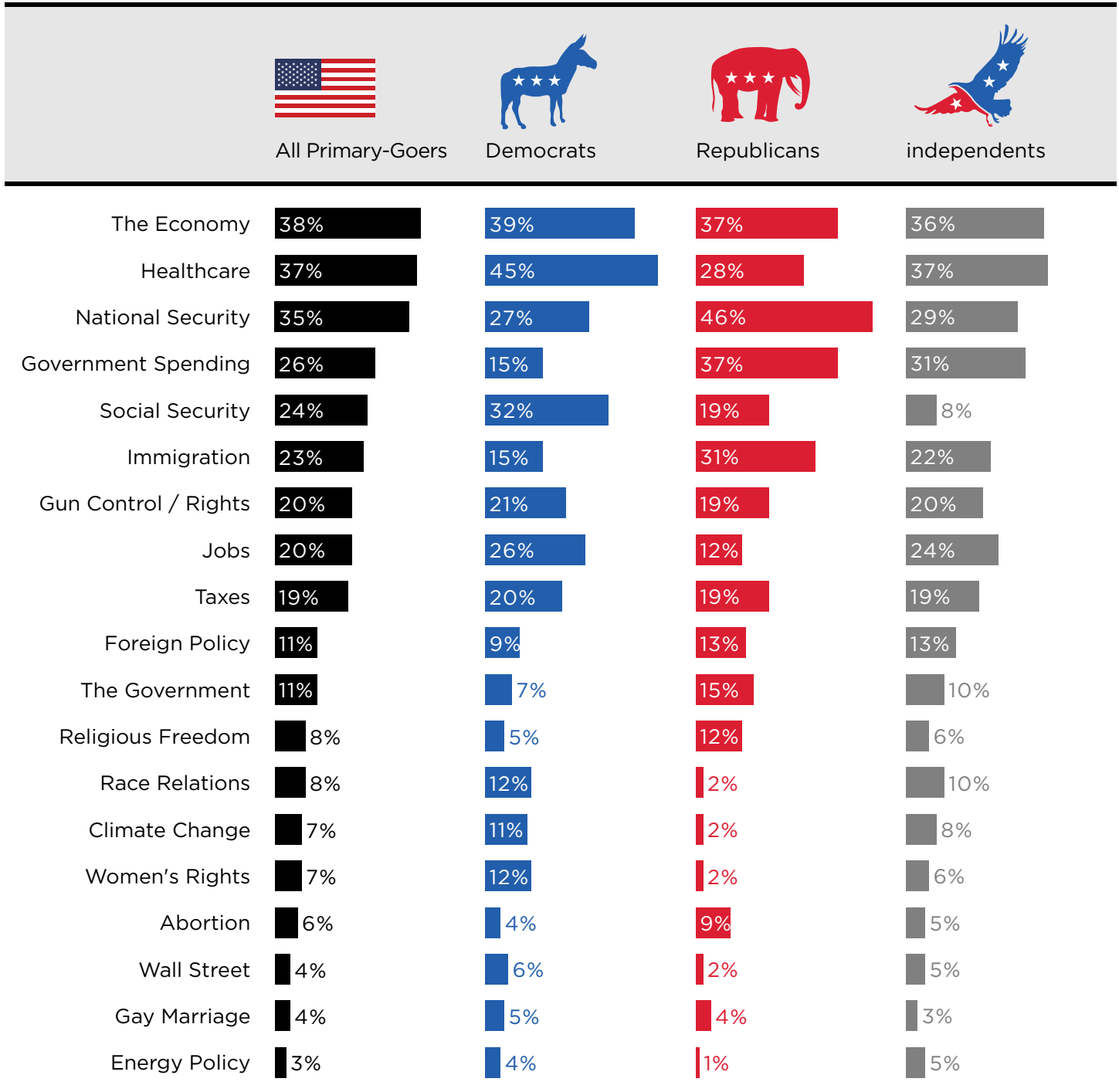


Source: The Local Vote 2016. Katz Media Group/Nielsen study of 351 registered voters in Pennsylvania. Interviews conducted March 28 to April 5, 2016.

IMPORTANCE OF ISSUES

BY PARTY AFFILIATION

% THAT SAY ISSUE IS A TOP FACTOR IMPACTING THEIR VOTE



Q: Below is a list of issues facing our nation. Select the top 3 issues that would most influence who you vote for in the Presidential election.
 Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio, Wisconsin and Pennsylvania. Analysis based on likely primary-goers: Registered Democrats (1,170), Registered Republicans (1,127) and Independents (441). Interviews conducted January 25 to April 5, 2016.

RADIO = TARGETABILITY

USING FORMATS TO TARGET VOTERS BY THE ISSUES THEY CARE MOST ABOUT

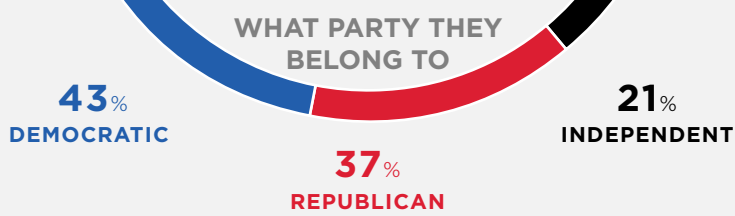
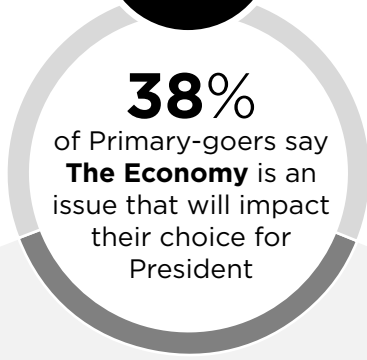
	Adult Contemporary	News/Talk/Sports	Classic Hits	Rock	Contemporary Hits	Country	Urban	Hispanic	Classical/Jazz
The Economy	104	100	108	108	107	97	88	117	85
Healthcare	98	95	109	103	110	102	126	91	94
National Security	102	109	109	97	80	111	72	97	106
Government Spending	100	110	98	105	75	112	54	69	108
Immigration	92	113	103	93	96	113	43	106	95
Gun Control/Rights	91	93	95	105	93	99	100	108	98
Jobs	92	81	99	93	122	87	195	168	63
Taxes	105	87	96	104	120	106	108	115	84
Foreign Policy	102	116	104	122	66	100	47	119	177
The Government	111	114	82	100	98	121	90	87	98
Religious Freedom	114	115	81	77	73	98	77	76	121
Race Relations	71	70	61	57	135	47	296	122	103
Climate Change	106	107	96	109	88	83	66	49	161
Women's Rights	105	79	104	94	141	90	160	57	122
Abortion	119	118	91	75	75	102	65	56	87
Wall Street	98	126	112	155	120	74	53	44	139
Gay Marriage	130	103	97	101	101	96	135	54	65
Energy Policy	91	115	120	116	95	112	92	69	176

POLITICAL LEANING
 Democrat Republican Skews equally across political parties
INDEX is based on a 100 average. Segments with lower indices

To be read: Primary-goers who say National Security impacts their candidate choice are 9% more likely to listen to News/Talk/Sports stations than the typical primary-goer. Primary-goers who say National Security impacts their candidate choice and listen to News/Talk/Sports stations tend to lean Republican.

Q: Below is a list of issues facing our nation. Select the top 3 issues that would most influence who you vote for in the Presidential election.
 Source: Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio, Wisconsin and Pennsylvania. Analysis based on 3,004 likely primary-goers. Interviews conducted January 25 to April 5, 2016.

IN THE INTEREST OF THE ECONOMY

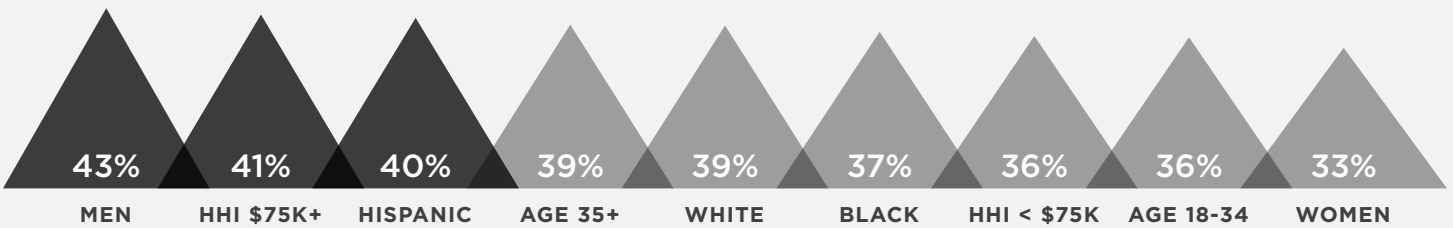


WHO THEY ARE VOTING FOR

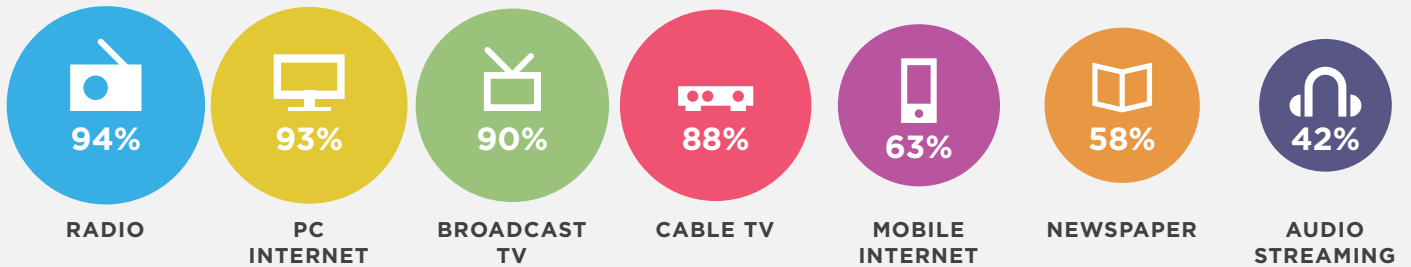


HOW THEY SKEW DEMOGRAPHICALLY

More Important ← → Less Important



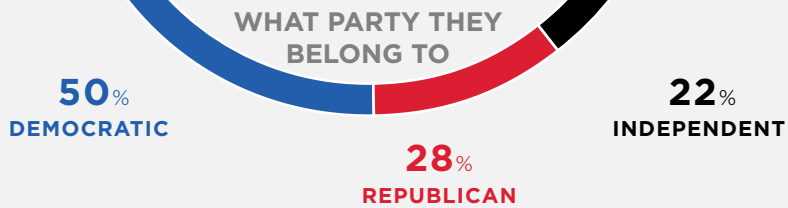
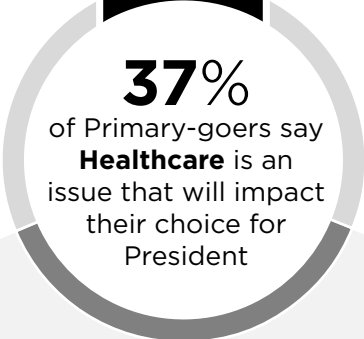
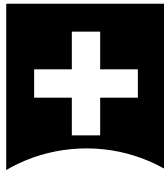
WHAT MEDIA PLATFORMS THEY USE



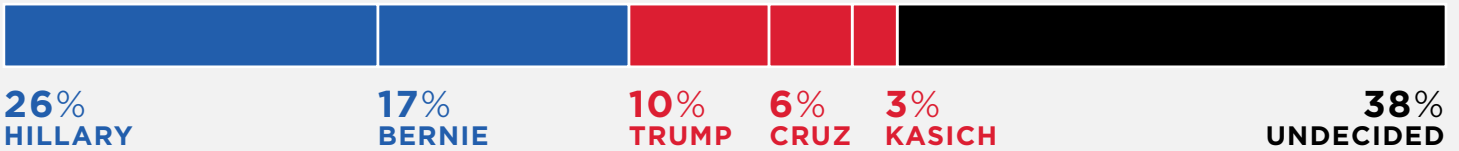
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. Audio Streaming = Local Radio, Pureplays and Music Streaming Services.

Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio, Wisconsin and Pennsylvania. Analysis based on 1,190 primary-goers who are influenced by the issue of The Economy. Interviews conducted January 25 to April 5, 2016.

IN THE INTEREST OF HEALTHCARE

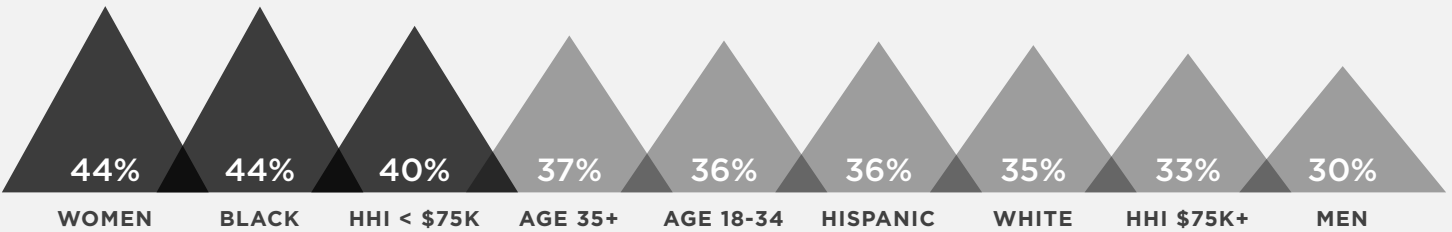


WHO THEY ARE VOTING FOR

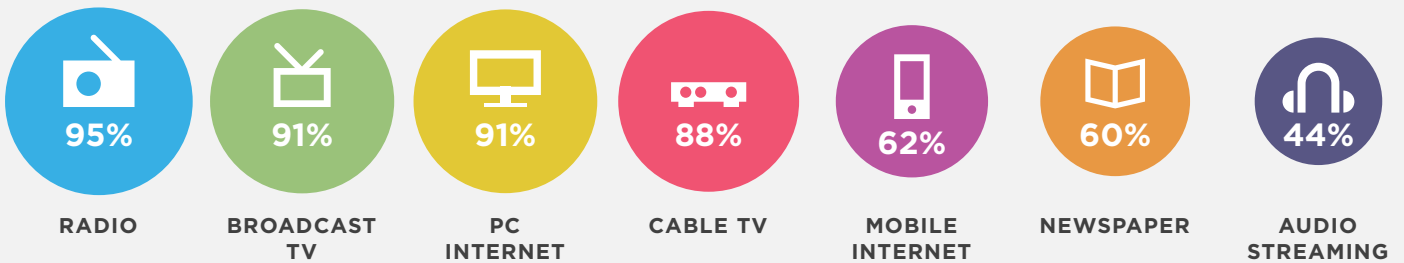


HOW THEY SKEW DEMOGRAPHICALLY

More Important ← → Less Important



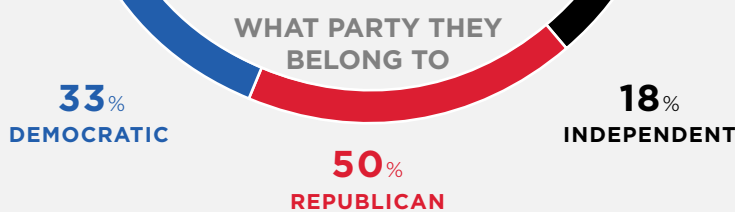
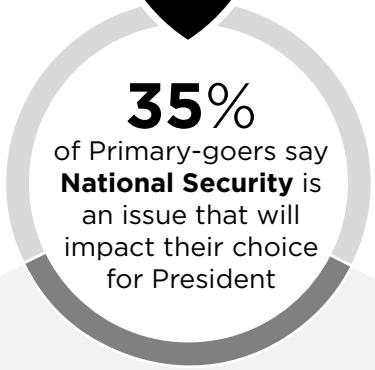
WHAT MEDIA PLATFORMS THEY USE



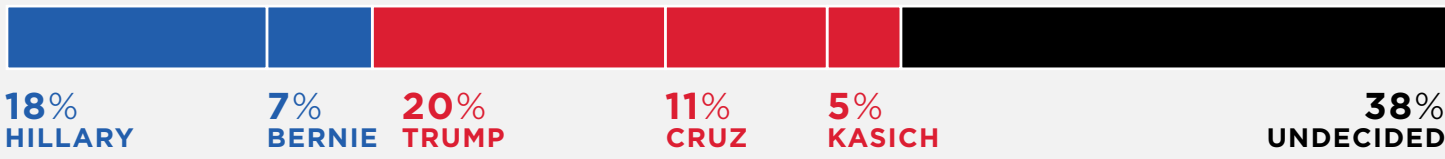
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. Audio Streaming = Local Radio, Pureplays and Music Streaming Services.

Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio, Wisconsin and Pennsylvania. Analysis based on 1,068 primary-goers who are influenced by the issue of Healthcare. Interviews conducted January 25 to April 5, 2016.

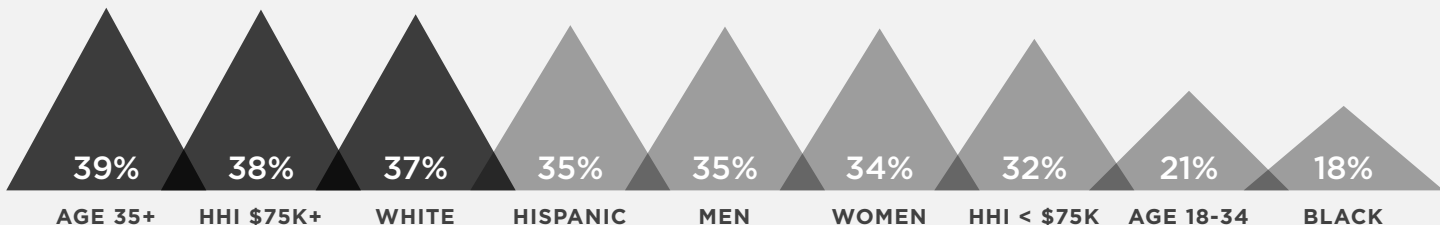
IN THE INTEREST OF
NATIONAL SECURITY



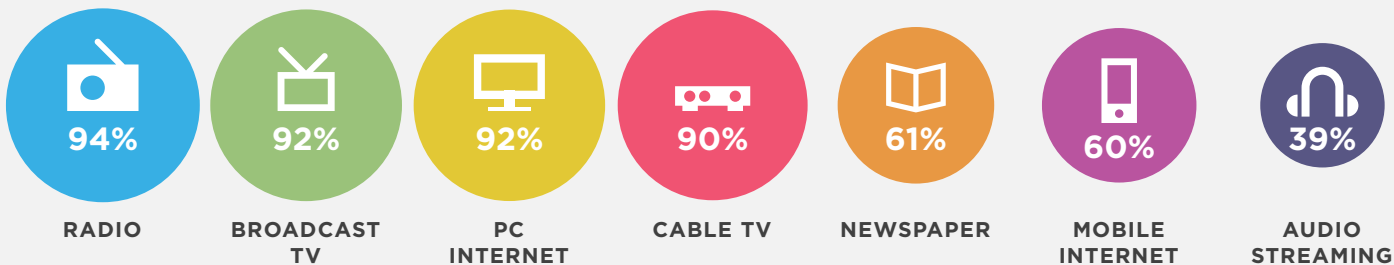
WHO THEY ARE VOTING FOR



More Important ← **HOW THEY SKEW DEMOGRAPHICALLY** → Less Important



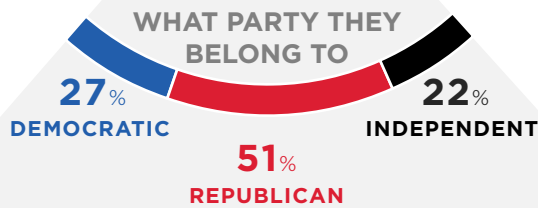
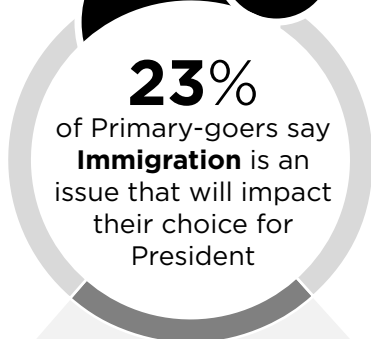
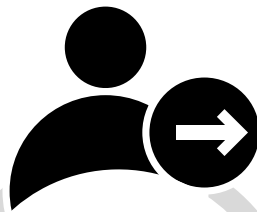
WHAT MEDIA PLATFORMS THEY USE



Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. Audio Streaming = Local Radio, Pureplays and Music Streaming Services.

Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio, Wisconsin and Pennsylvania. Analysis based on 1,025 primary-goers who are influenced by the issue of National Security. Interviews conducted January 25 to April 5, 2016.

IN THE INTEREST OF IMMIGRATION

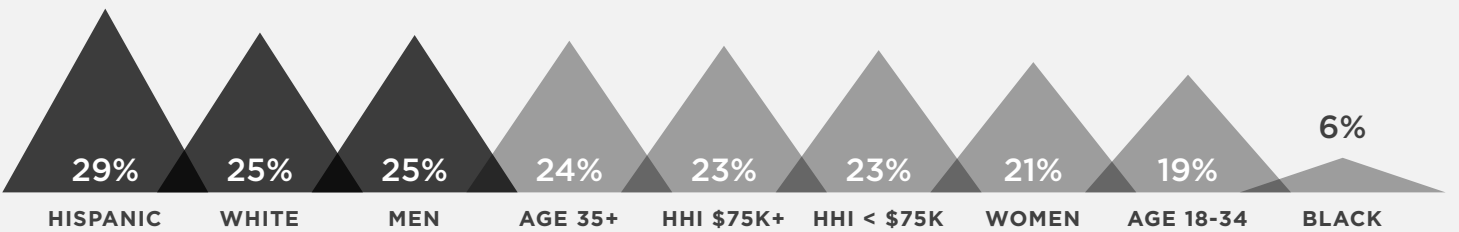


WHO THEY ARE VOTING FOR

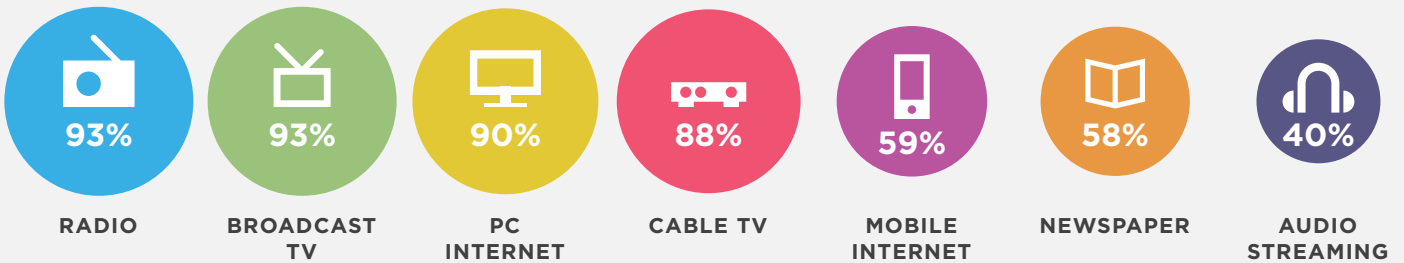


HOW THEY SKEW DEMOGRAPHICALLY

More Important ← → Less Important



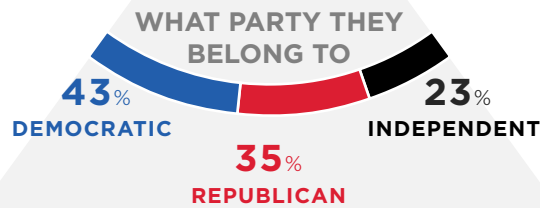
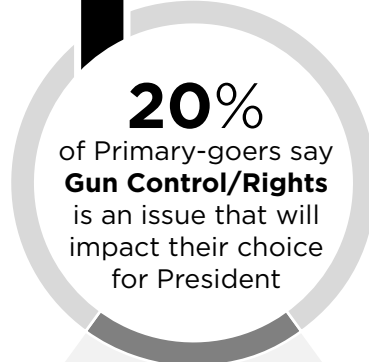
WHAT MEDIA PLATFORMS THEY USE



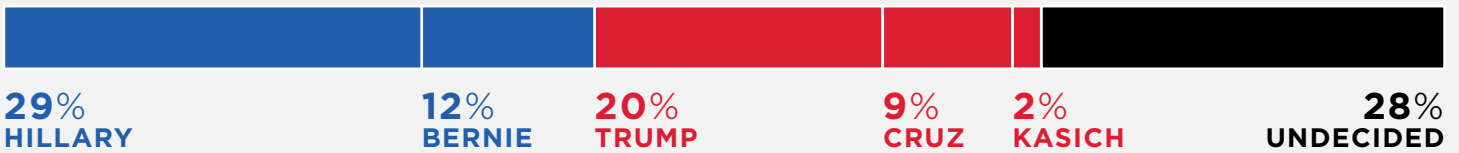
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. Audio Streaming = Local Radio, Pureplays and Music Streaming Services.

Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio, Wisconsin and Pennsylvania. Analysis based on 640 primary-goers who are influenced by the issue of Immigration. Interviews conducted January 25 to April 5, 2016.

IN THE INTEREST OF
**GUN CONTROL/
RIGHTS**



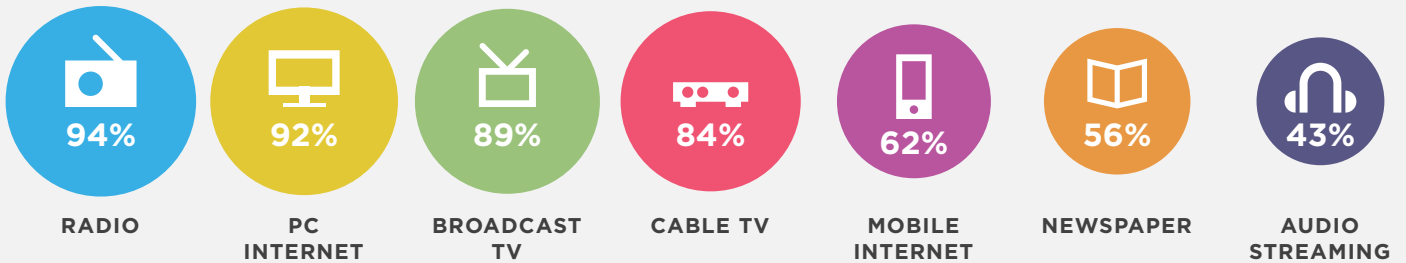
WHO THEY ARE VOTING FOR



More Important ← HOW THEY SKEW DEMOGRAPHICALLY → Less Important



WHAT MEDIA PLATFORMS THEY USE






Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. Audio Streaming = Local Radio, Pureplays and Music Streaming Services.

Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio, Wisconsin and Pennsylvania. Analysis based on 565 primary-goers who are influenced by the issue of Gun Control/Rights. Interviews conducted January 25 to April 5, 2016.

TARGETABILITY OF LOCAL RADIO

POLITICAL LEANING

-  DEMOCRAT
-  REPUBLICAN
-  INDEPENDENT

PITTSBURGH



PHILADELPHIA



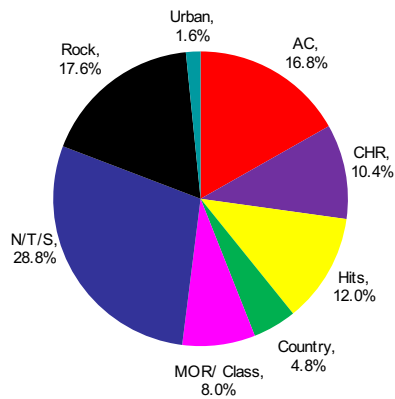
When it comes to targeting voters, local broadcast has powerful new tools to segment your audience and deliver MASSively. Here are snapshots of differences that we see in Philadelphia and Pittsburgh. Multiple radio formats offer a high density, political target audience for campaigns.

Finding the Perfect Radio Formats to Reach Republican, Democrat and Independent Voters in Philadelphia



REPUBLICANS

Top 3 Format Preferences for Republicans are N/T/S, Rock, & AC



News/Talk/Sports

1. WIP-F (Sports)
2. KYW-A (News)
3. WPEN-F (Sports)

Rock

1. WMMR-F (Album Or. Rock)
2. WMGK-F (Classic Rock)
3. -

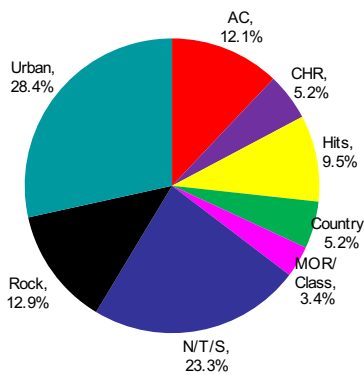
Adult Contemporary

1. WBEB-F (AC)
2. WISX-F (Hot AC)
3. WJBR-F (AC)



DEMOCRATS

Top 3 Format Preferences for Democrats are Urban, N/T/S, & Rock



Urban

1. WDAS-F (Urban AC)
2. WRNB-F (Urban Oldies)
3. WPPZ-F (Urban Inspirational)

News/Talk/Sports

1. KYW-A (News)
2. WIP-F (Sports)
3. WPHT-A (Talk)

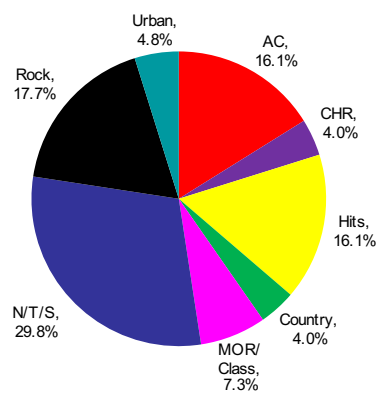
Rock

1. WMGK-F (Classic Rock)
2. WMMR-F (Album Or. Rock)
3. -



INDEPENDENTS

Top 3 Format Preferences for Independents are N/T/S, Rock, & Hits



News/Talk/Sports

1. KYW-A (News)
2. WIP-F (Sports)
3. WPEN-F (Sports)

Rock

1. WMGK-F (Classic Rock)
2. WMMR-F (Album Or. Rock)
3. -

Hits

1. WOGL-F (Classic Hits)
2. WEBN-F (Adult Hits)
3. -

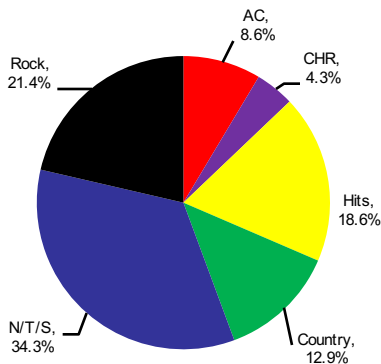
Source: Nielsen Political Ratings FA15, Adults 35+, AQH Ratings Rank and AQH Share, M-F 6a-7p, Nielsen Non-Subscribers excluded

Finding the Perfect Radio Formats to Reach Republican, Democrat and Independent Voters in Pittsburgh



REPUBLICANS

Top 3 Format Preferences for Republicans are N/T/S, Rock and Hits



News/Talk/Sports

- 1t. KDKA-A (News Talk)
- 1t. KDKA-F (Sports)
3. WBGG-A (Sports)

Rock

1. WDVE-F (AOR)
2. WXDX-F (Alternative)
3. -

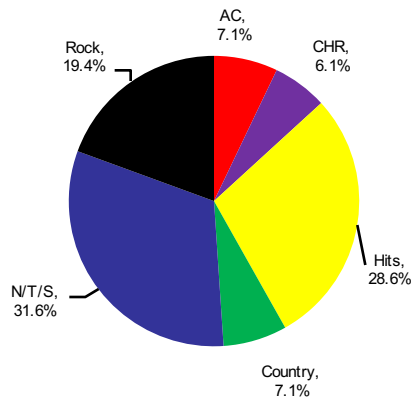
Hits

1. WWSW-F (Classic Hits)
2. WRRK-F (Adult Hits)
3. -



DEMOCRATS

Top 3 Format Preferences for Democrats are N/T/S, Hits and Rock



News/Talk/Sports

1. KDKA-A (News Talk)
2. KDKA-F (Sports)
3. WBGG-A (Sports)

Hits

1. WWSW-F (Classic Hits)
2. WRRK-F (Adult Hits)
3. -

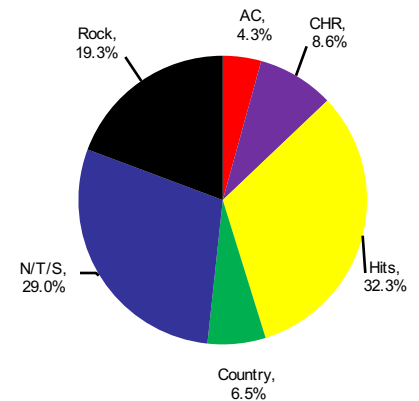
Rock

1. WDVE-F (AOR)
2. WXDX-F (Alternative)
3. -



INDEPENDENTS

Top 3 Format Preferences for Independents are Hits, N/T/S and Rock



Hits

1. WWSW-F (Classic Hits)
2. WRRK-F (Adult Hits)
3. -

News/Talk/Sports

1. KDKA-A (News Talk)
2. KDKA-F (Sports)
3. -

Rock

1. WDVE-F (AOR)
2. WXDX-F (Alternative)
3. -

Source: Nielsen Political Ratings FA15, Adults 35+, AQH Ratings Rank and AQH Share, M-F 6a-7p, Nielsen Non-Subscribers excluded

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