



THE LOCAL VOTE 2016

# INDEPENDENTS IN FOCUS

ROAD TO THE  
APRIL  
CONTESTS



# COURTING THE INDEPENDENT VOTE

**M**arch comes in like a lion and goes out like a lamb. Although we've all heard the adage, it in no way applies to this 2016 political season. As we turn our attention toward the April contests, Democrat and Republican candidates continue to fight, scratch and claw for state victories and delegates. The Philadelphia and Cleveland conventions are still a long way away.



The Local Vote 2016 continues to unearth important insights to help candidates, political strategists and interested parties effectively use media to engage the local electorates. In this third report, we shine a spotlight on **Wisconsin**. Because the Badger State is holding an “open primary” on April 5, citizens are free to vote regardless of party affiliation. This places great importance on courting Independent voters who could make the difference between winning or losing.

Independents have already been a major factor in the primaries, particularly for the Trump and Sanders campaigns. But as we look toward the November general election, **Independents will play an even more pivotal role - as no candidate can win the Presidency without their support.**

## KEY INSIGHTS

- Across all states that Katz Media Group has polled, Local TV News consistently dominates other news outlets among the electorate. Local TV News viewership ranges from 67% of voters in Ohio to 73% in Illinois.
- Local News is entrenched in the daily lives of **Independent** voters. 2 out of 3 **Independents** watch their Local newscasts on a regular basis. This percentage is significantly higher than Newspapers (55%) and national Cable News channels (40%)
- In Wisconsin, nearly 4 out of 10 eligible voters (38%) are undecided about their choice of candidate or whether they will go to the polls. This large share of the electorate (called the “Opportunity Vote”) is primed for political messaging.
- 9 in 10 Opportunity Voters in Wisconsin watch Broadcast TV which outpaces other TV alternatives.
- Early polling in Wisconsin shows Bernie Sanders with a modest lead over Hillary Clinton (41% vs. 32%), but 27% of Democratic primary-goers are still undecided on whom to cast a ballot for. Meanwhile, the Republican race is hotly contested with no clear front-runner. Among Wisconsin Republican primary-goers, a whopping 41% are still undecided on whom they are voting for.

## 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.

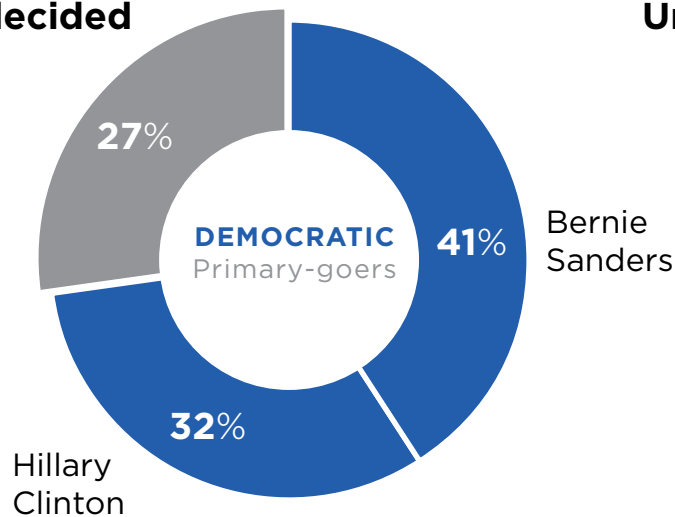
The results of this re-contact study, which are specific to voters' opinions on the 2016 Presidential election, are tied back to the respondents' Scarborough data including their demographic profile and media consumption. Wave 1 data represents 1,007 registered voters across the states of Colorado (251), 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.

# PULSE OF THE ELECTORATE

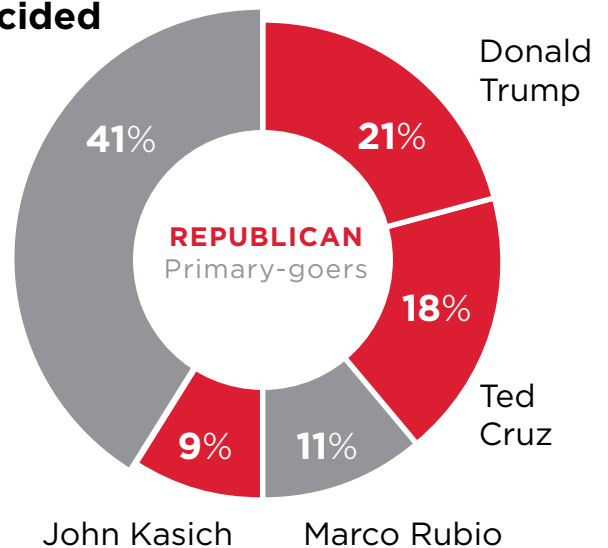


Both races are hotly contested in Wisconsin. While Bernie has small lead over Hillary, 27% of primary-goers are still undecided. Meanwhile, a whopping 41% of Republican primary-goers are undecided on who they are voting for.

## Undecided

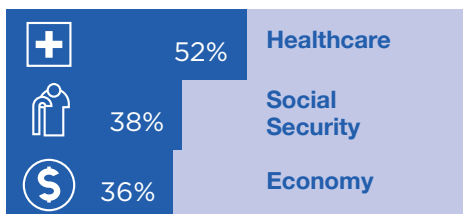


## Undecided

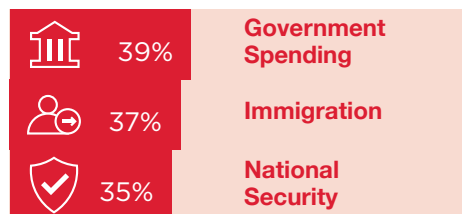


Wisconsin Democrats and Independents are keenly focused on Healthcare when picking a Presidential candidate, while Republicans tend to consider Government Spending, Immigration and National Security.

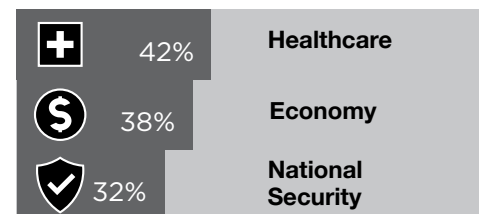
### Registered Democrats



### Registered Republicans



### Independents

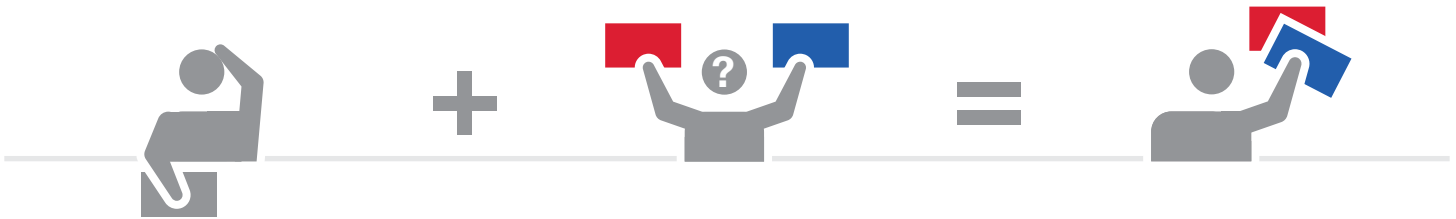


Q: What candidate do you plan to vote for in the upcoming primary election?  
 Q: Below is a list of issues facing our nation. Select the top 3 issues that would most influence who you vote for in the Presidential election.  
 Source: The Local Vote 2016. Katz Media Group/Nielsen study of 350 registered voters in Wisconsin. Interviews conducted March 7-10, 2016.

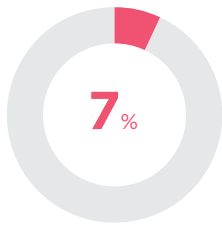
# THE OPPORTUNITY VOTE



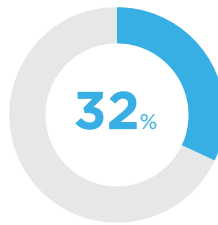
Getting Wisconsin voters to turn out and influencing those who are undecided are critical goals for political campaigns



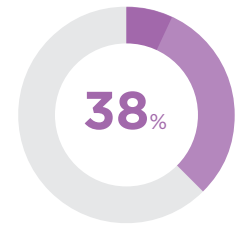
The **Turnout** Vote  
Percentage of eligible voters who have yet to decide if they are voting in the primaries



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

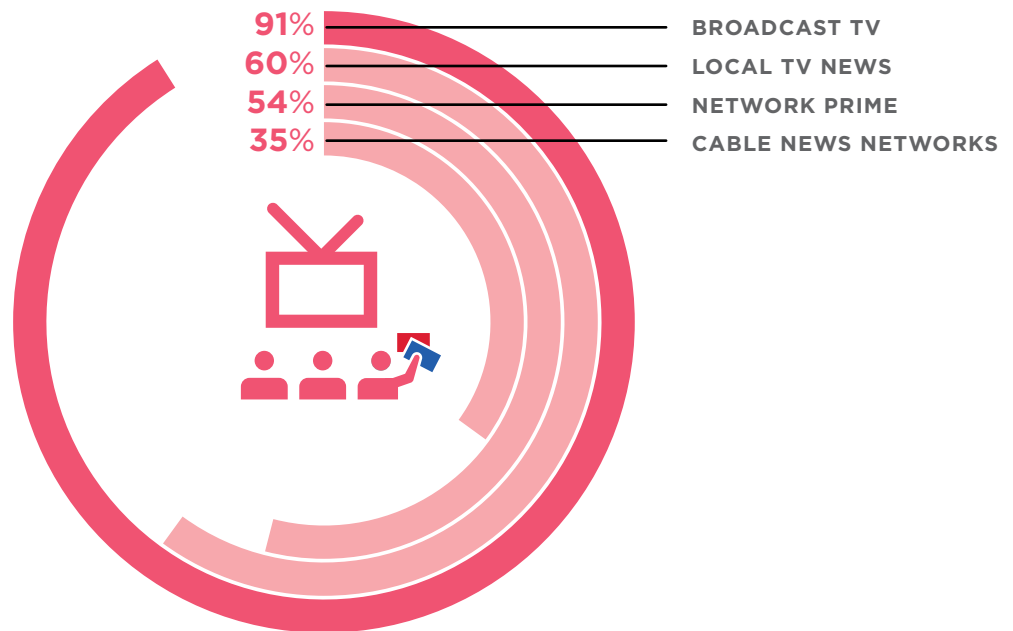


The **Opportunity** Vote  
Percentage of eligible voters who are unsure if they are going to vote -or- do plan to vote, but are undecided on a candidate



## The Power of Local Television

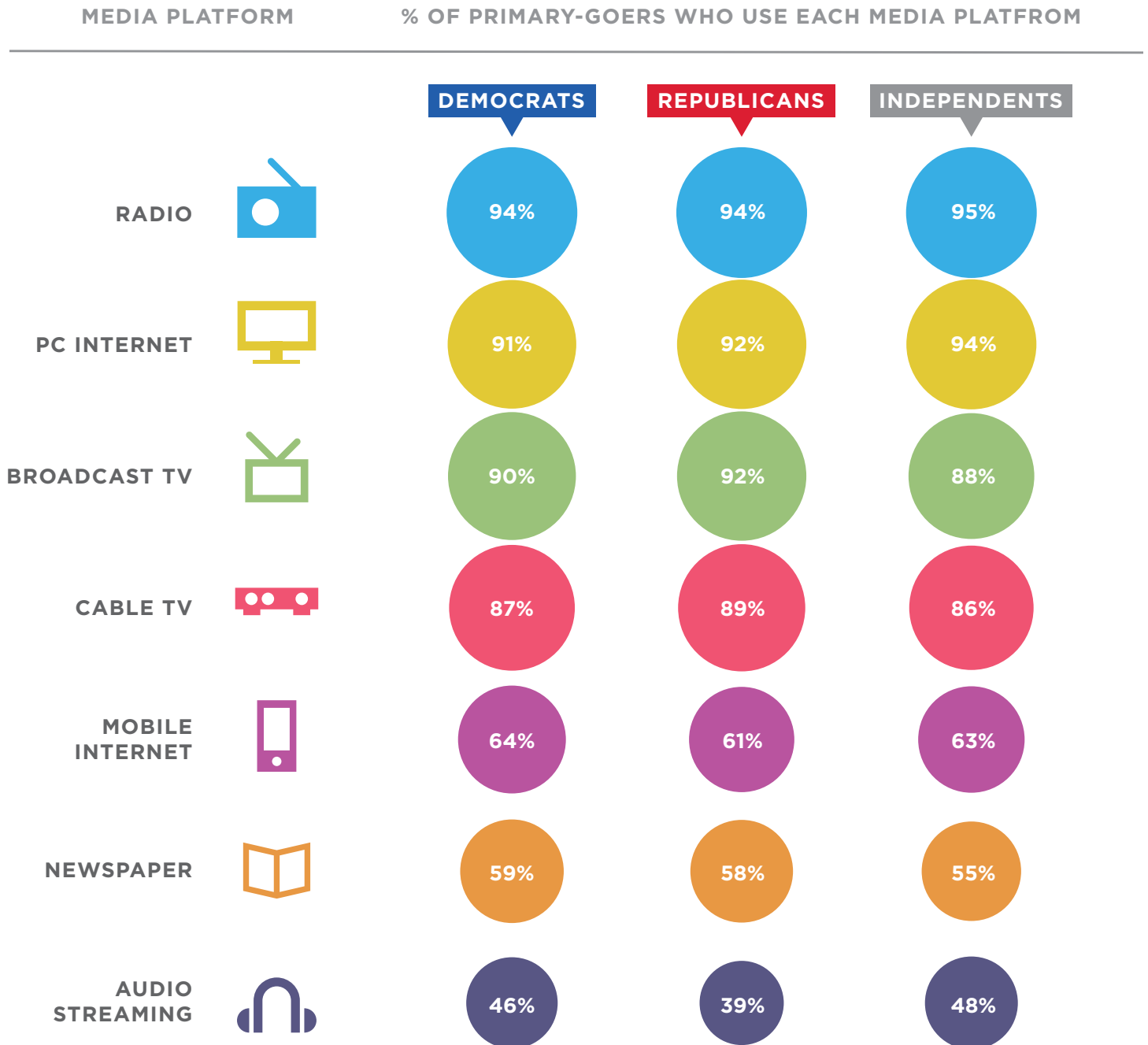
**Local Broadcast** and **TV News** outpace other TV alternatives in reaching Opportunity Voters in Wisconsin



Source: The Local Vote 2016. Katz Media Group/Nielsen study of 350 registered voters in Wisconsin. Interviews conducted March 7-10, 2016.

# PARTY VOTERS THROUGH THE MEDIA LENS

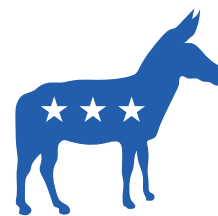
## Mainstream Media – Where Candidates Engage the Electorate



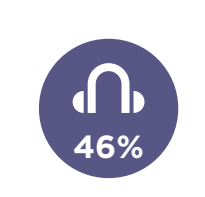
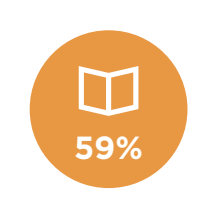
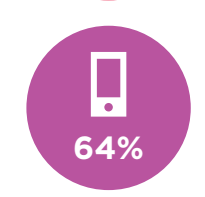
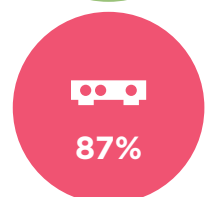
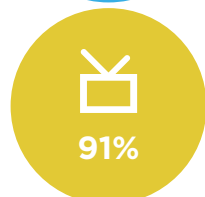
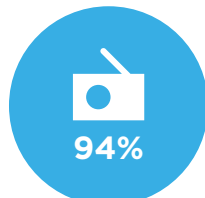
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month.  
Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio and Wisconsin. Analysis based on likely primary-goers: Registered Democrats (1,031), Registered Republicans (993) and Independents (431). Interviews conducted January 25 to March 10, 2016.

# DEMOCRATS

## THROUGH THE MEDIA LENS

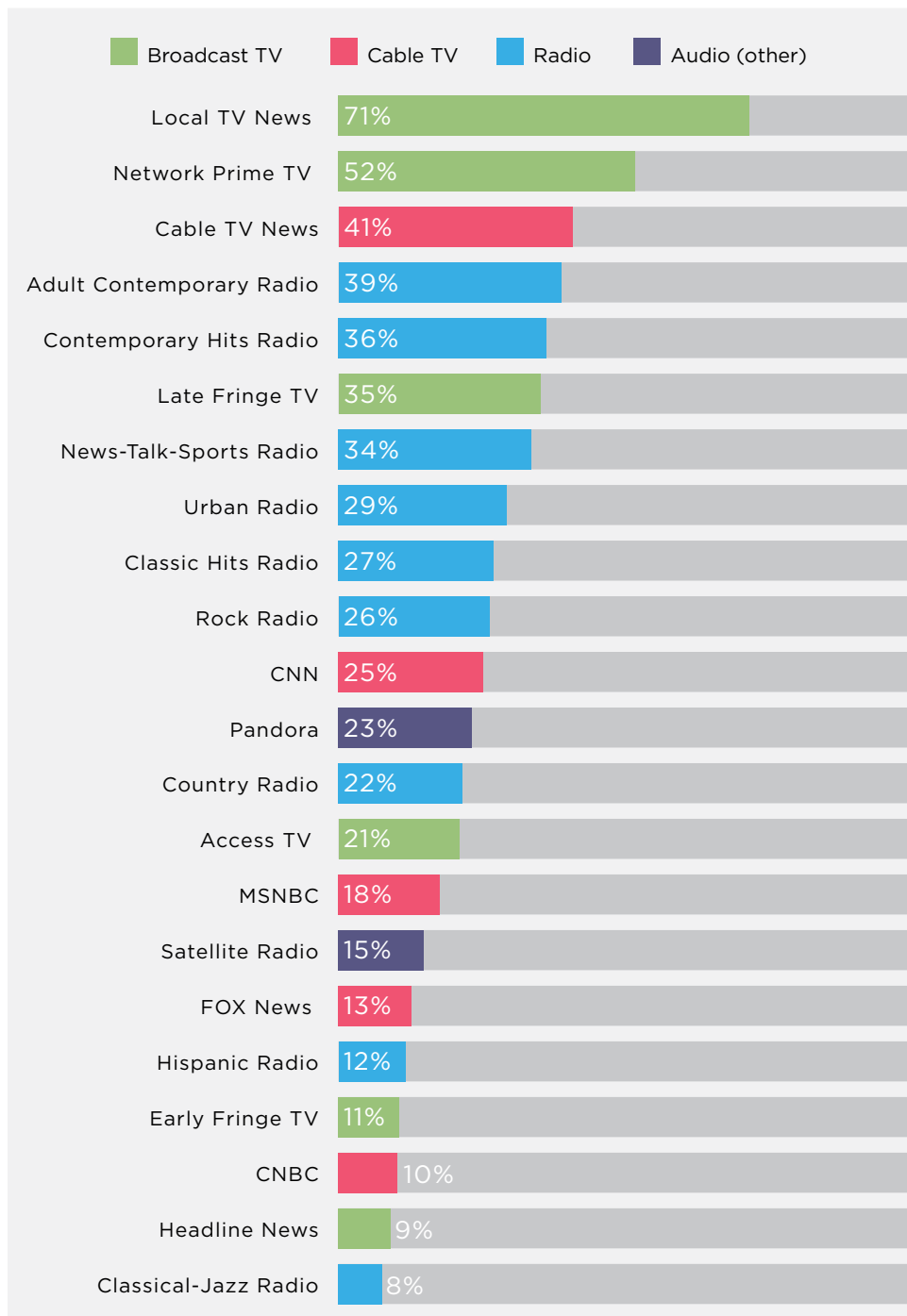


### MEDIA PLATFORM



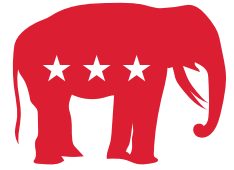
### THE DOMINANCE OF LOCAL TV NEWS

#### Where to Talk to Democratic Primary-Goers

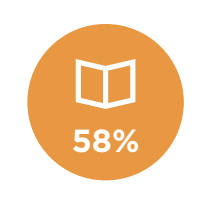
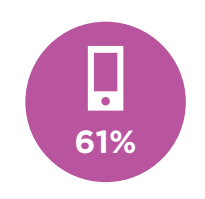
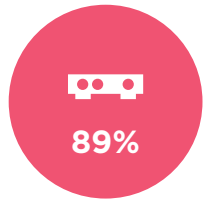
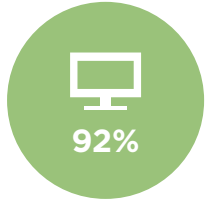
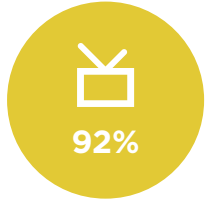
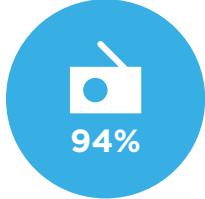


Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. TV dayparts are based on 5-Net broadcast. Cable TV News includes CNN, MSNBC, FOX News, CNBC and Headline News. Audio Streaming = Local Radio, Pureplays and Music 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 and Wisconsin. Analysis based on likely primary-goers who are registered Democrats (1,031). Interviews conducted January 25 to March 10, 2016.

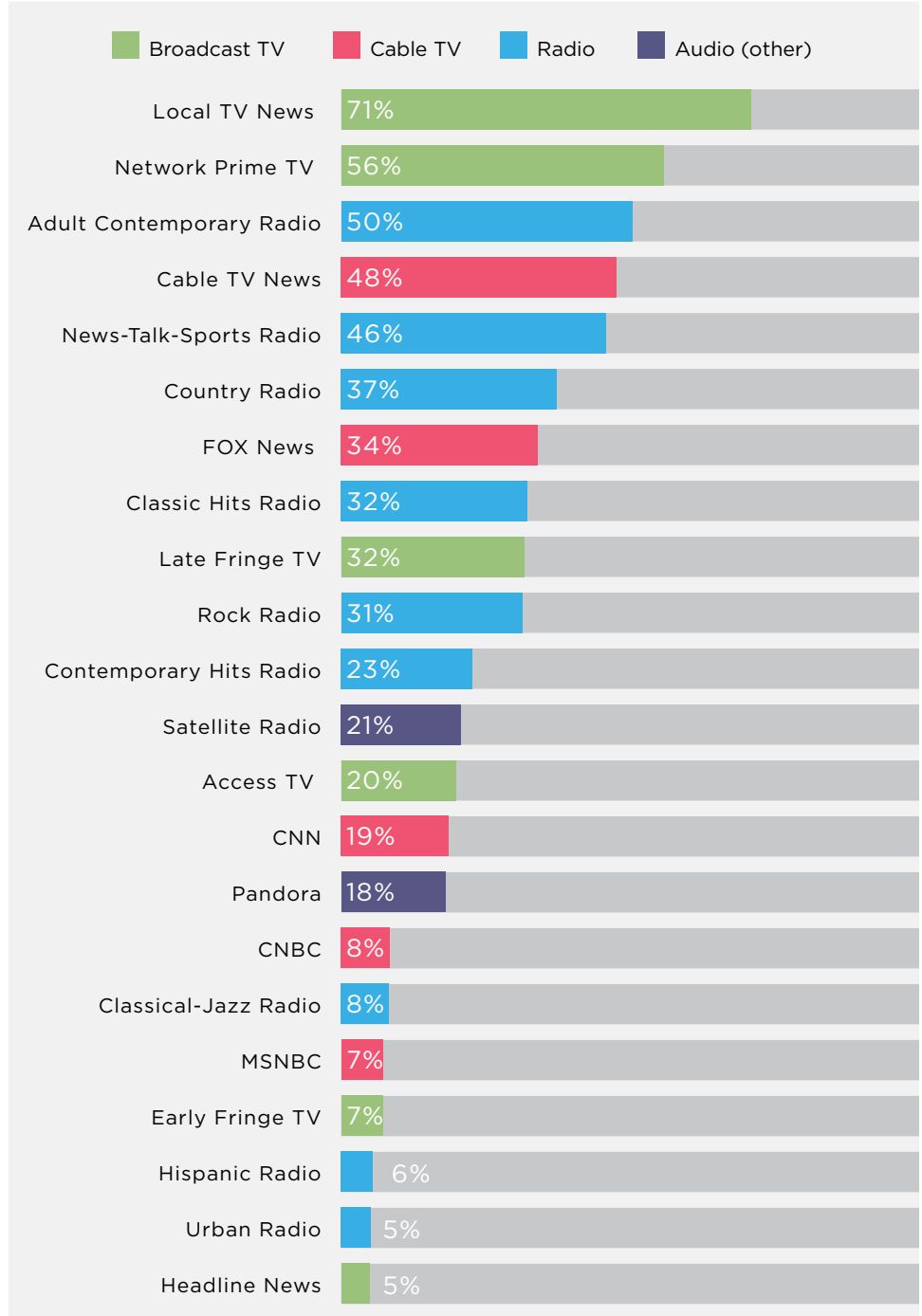
# REPUBLICANS THROUGH THE MEDIA LENS



## MEDIA PLATFORM



## THE DOMINANCE OF LOCAL TV NEWS Where to Talk to Republican Primary-Goers



Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. TV dayparts are based on 5-Net broadcast. Cable TV News includes CNN, MSNBC, FOX News, CNBC and Headline News. 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 and Wisconsin. Analysis based on likely primary-goers who are registered Republicans (993). Interviews conducted January 25 to March 10, 2016.

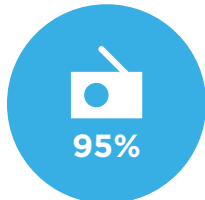


# INDEPENDENTS

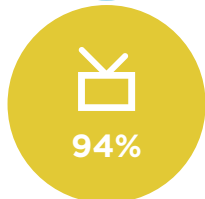
## THROUGH THE MEDIA LENS



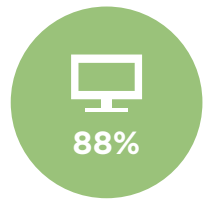
### MEDIA PLATFORM



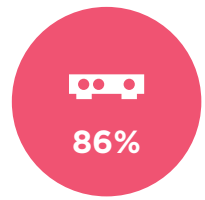
**RADIO**



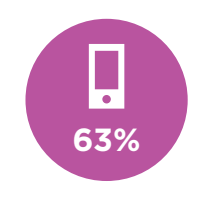
**PC INTERNET**



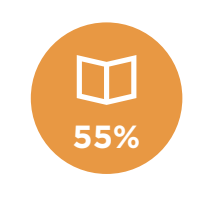
**BROADCAST TV**



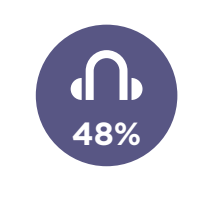
**CABLE TV**



**MOBILE INTERNET**



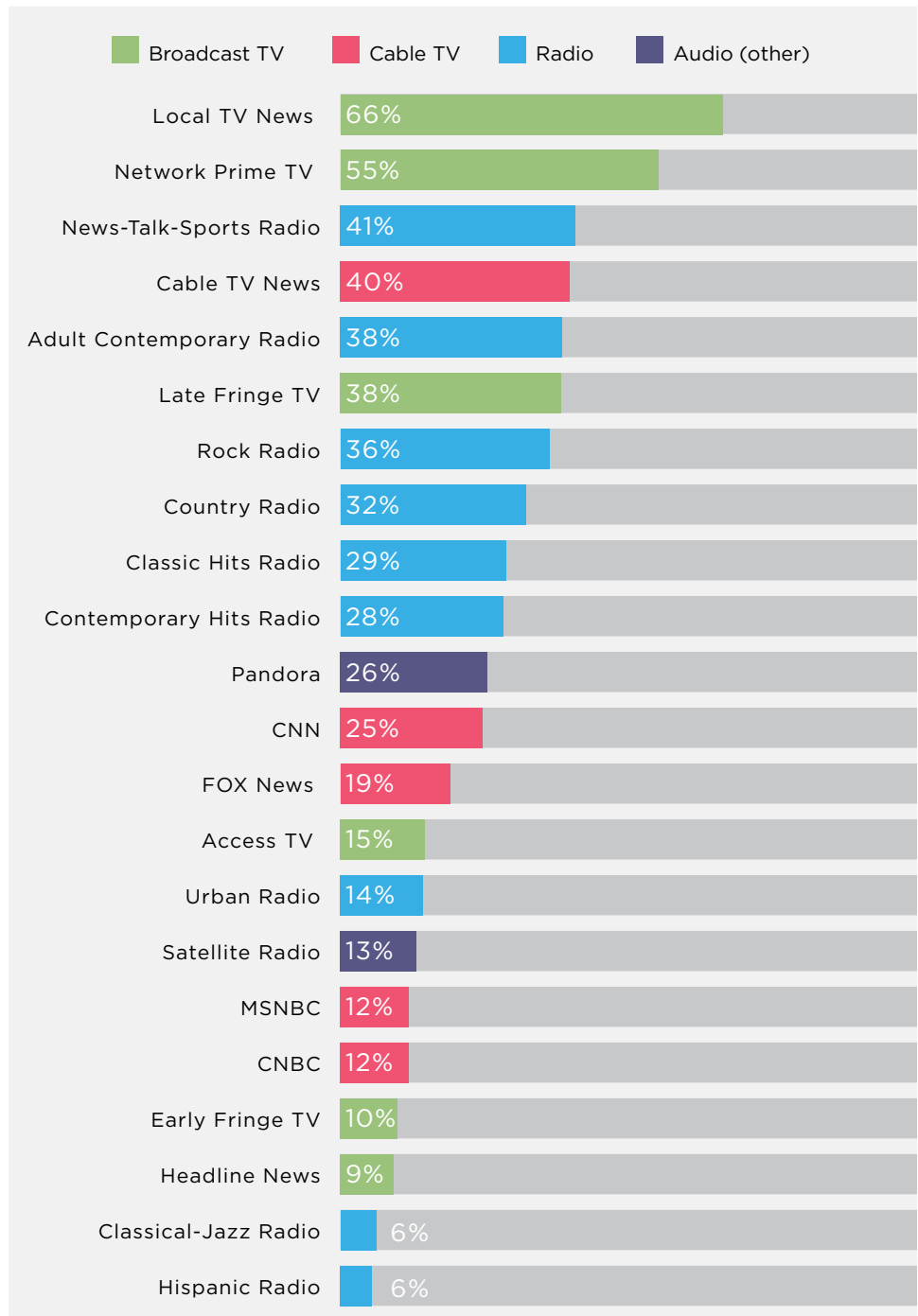
**NEWSPAPER**



**AUDIO STREAMING**

### THE DOMINANCE OF LOCAL TV NEWS

#### Where to Talk to Independent Primary-Goers



Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. TV dayparts are based on 5-Net broadcast. Cable TV News includes CNN, MSNBC, FOX News, CNBC and Headline News. 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 and Wisconsin. Analysis based on likely primary-goers who are Independents (431). Interviews conducted January 25 to March 10, 2016.



# TARGETABILITY OF LOCAL TV

## POLITICAL LEANING



DEMOCRAT



REPUBLICAN



INDEPENDENT

GREEN BAY



MADISON



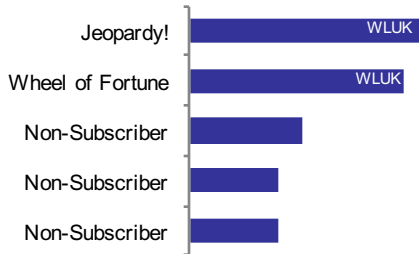
**W**hen it comes to targeting voters, local broadcast has powerful new tools to segment your audience and deliver MASSively. Here's a snapshot of the differences we see across key markets in Wisconsin: Green Bay and Madison. **TV offers a high density, political target audience for campaigns.**

# Reach your Primary Election Voters in Green Bay by Utilizing TV Dayparts throughout the day!

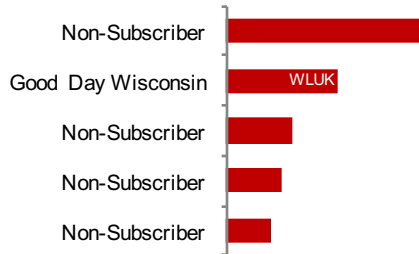
Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	96	112	110
Daytime	109	104	115
Early Fringe	108	108	118
Prime Access	137	110	119
Prime	116	105	114
Late Fringe	114	108	114

## Top TV Programs to reach Green Bay's Primary Election Voters in their Strongest Daypart

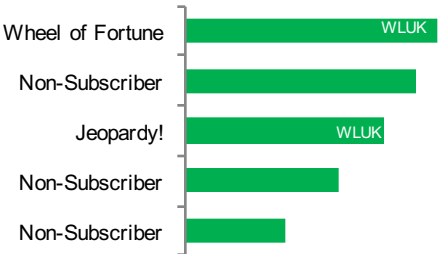
Democrat Primary Prime Access Shows:



Republican Primary Early Morning Shows:

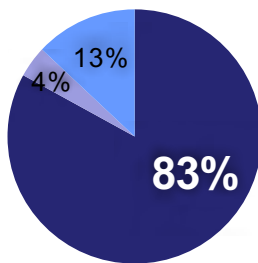


Independent Primary Prime Access Shows:

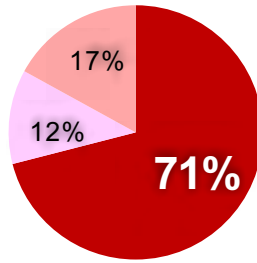


## Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:

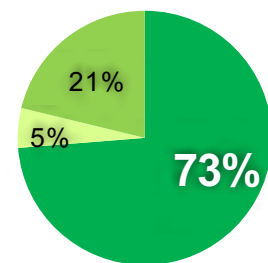
Democrat Primary Election Voter in Prime Access\*



Republican Primary Election Voter in Early Morning



Independent Primary Election Voter in Prime Access



■ Broadcast ■ Cable News ■ Cable Entertainment ■ Broadcast ■ Cable News ■ Cable Entertainment ■ Broadcast ■ Cable News ■ Cable Entertainment

\*Of the HH with Democrat Primary Election Voters Viewing Prime Access, 83% view Broadcast, 4% view cable news nets, 13% view entertainment nets. Broadcast (ABC, CBS, NBC, FOX, CW, MyNet); Cable News Nets (CNN, FXNC, HLN, MSNBC) Entertainment Nets are all other reported cable nets. Total displayed may not equal 100% due to rounding.

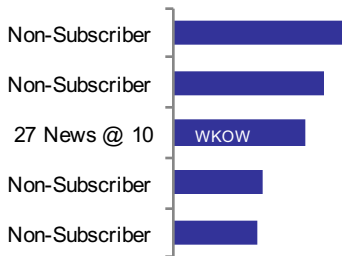
Source: comScore Local Nov '15 Green Bay Political; HH Ratings with Political Personas; Time Periods: Early Morning (M-F 5a-8a), Daytime (M-F 8a-3p), Early Fringe (M-F 3p-6p), Prime Access (M-F 6p-7p), Prime (M-Su 7p-10p), Late Fringe (M-F 10p-1a); Index = Political Persona Rating vs HH Rating, HH Rating for Programming and Genre. Non-subscribers to comScore Local data depicted but not identified.

# Reach your Primary Election Voters in Madison by Utilizing TV Dayparts throughout the day!

Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	99	63	120
Daytime	94	74	117
Early Fringe	101	87	123
Prime Access	101	73	119
Prime	103	83	114
Late Fringe	111	72	115

## Top TV Programs to reach Madison's Primary Election Voters in their Strongest Daypart

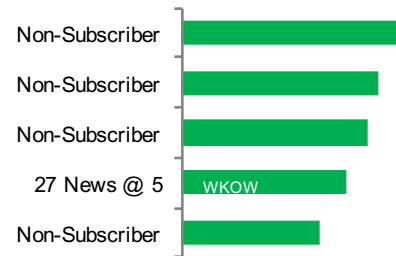
Democrat Primary Late Fringe Shows:



Republican Primary Early Fringe Shows:

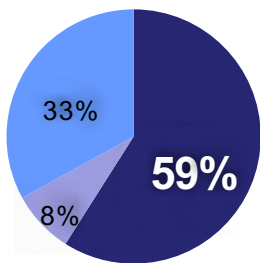


Independent Primary Early Fringe Shows:

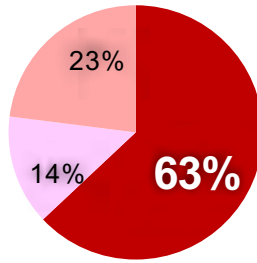


## Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:

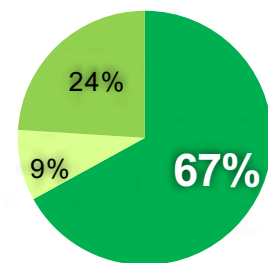
Democrat Primary Election Voter in Late Fringe\*



Republican Primary Election Voter in Early Fringe



Independent Primary Election Voter in Early Fringe



■ Broadcast ■ Cable News ■ Cable Entertainment ■ Broadcast ■ Cable News ■ Cable Entertainment ■ Broadcast ■ Cable News ■ Cable Entertainment

\*Of the HH with Democrat Primary Election Voters Viewing Prime Access, 59% view Broadcast, 8% view cable news nets, 33% view entertainment nets. Broadcast (ABC, CBS, NBC, FOX, CW, MyNet); Cable News Nets (CNN, FXNC, HLN, MSNBC) EntertainmentNets are all other reported cable nets. Total displayed may not equal 100% due to rounding.

Source: comScore Local Nov '15 Madison Political; HH Ratings with Political Personas; Time Periods: Early Morning (M-F 5a-8a), Daytime (M-F 8a-3p), Early Fringe (M-F 3p-6p), Prime Access (M-F 6p-7p), Prime (M-Su 7p-10p), Late Fringe (M-F 10p-1a); Index = Political Persona Rating vs HH Rating, HH Rating for Programming and Genre. Non-subscribers to comScore Local data depicted but not identified.