KATZ MEDIA GROUP

THE LOCAL VOTE 2016

THE LOCAL VOTE 2016

THE ROAD TO SUPER TUESDAY

COURTING "THE OPPORTUNITY VOTE"

Success on the national political stage is built from a capacity to understand and address the interests of local constituencies. Katz Media Group's political insight initiative, "The Local Vote 2016", is aimed at understanding the political concerns that voters are voicing in advance of their state primaries, unearthing critical differences between states and markets within. With robust state-level data linked to media behavior, the Katz study has unearthed important insights to help candidates, political strategists and interested parties effectively use media to engage the local electorates.

Getting registered voters to turn out and influencing those who are still undecided are critical goals at this point in the Primary season. Katz Media Group took a close look at these important voter segments and their media preferences and behaviors across three important states in the March 1st Super Tuesday lineup – Colorado, Texas and Virginia. With two weeks left before the Primary, here's what we've learned:

KEY INSIGHTS

- One out of three voters is still undecided about either their candidate choice or whether to even go to the polls on Super Tuesday.

- Seven key issues are driving the most influence on candidate selection, but are prioritized differently for voters according to state and party lines. These issues are: Healthcare, the Economy, Gun Control/Gun Rights, Jobs, National Security, Government Spending and Immigration.

- Local Broadcast and TV News outpace other TV alternatives (cable news and entertainment) in reaching Opportunity Voters

- The majority of voters agree that Local TV News is more appropriate for political advertising than all other potential sources of video, including the Internet. Social and Mobile.

- Multiple television dayparts (not just News) offer a high density, political target audience for campaigns.
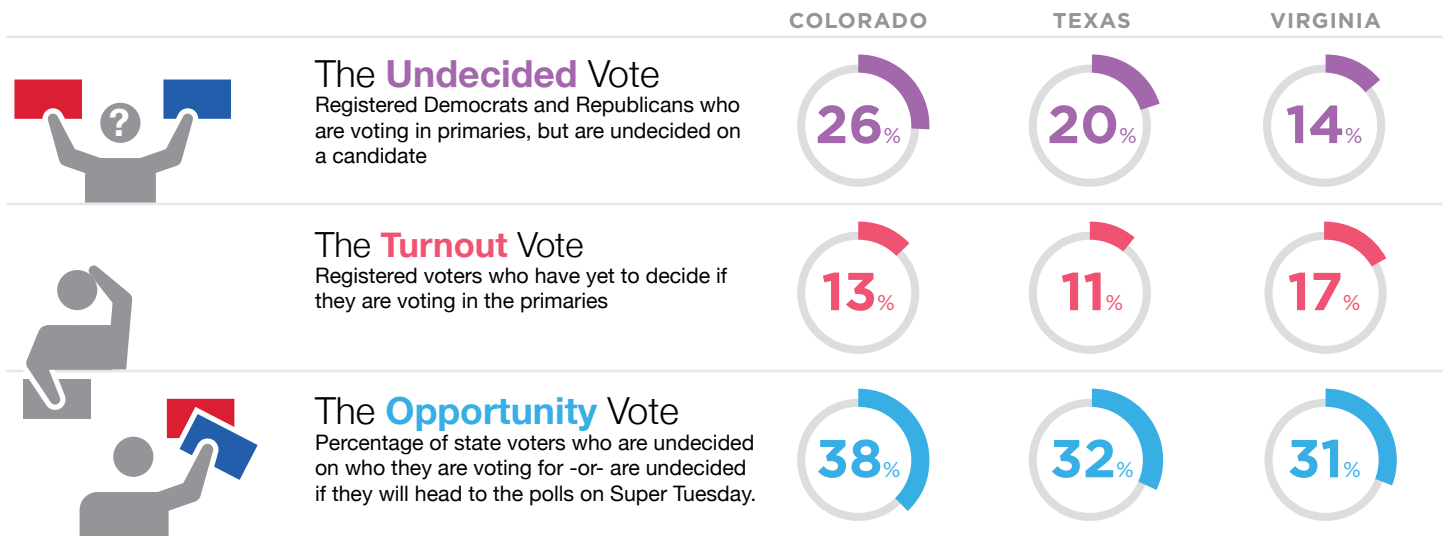
ABOUT THE LOCAL VOTE 2016 INITIATIVE

Katz Media Group has commissioned Nielsen to survey a representative sample of registered voters across 10 states in the weeks leading up to their Presidential primary elections in February, March and April 2016. The registered respondents had previously participated in a Scarborough study. Scarborough is a division of Nielsen that offers media, agency and advertiser clients behavioral insights on the US consumer 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 US. Adult 18+ population. The results of this re-contact study, which is specific to voters' opinions on the 2016 Presidential election, are tied back to the respondents' Scarborough data about their demographic profile and media consumption. Wave 1 data represents 1,007 registered voters across the states of Colorado (250), Texas (503) and Virginia (254) interviewed January 25 – February 5, 2016.
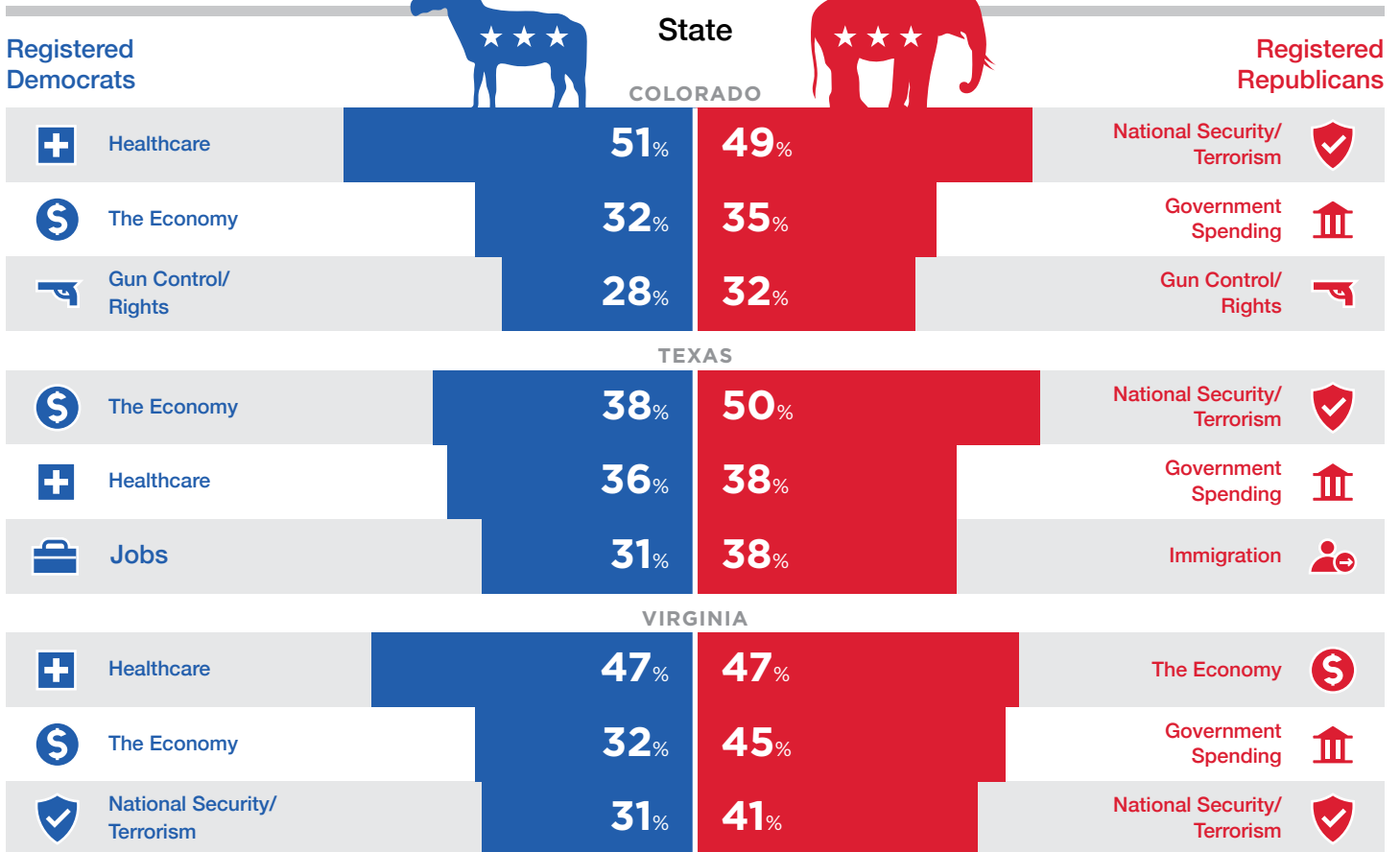
Katz Media Group will be reporting on this initiative throughout the 2016 Presidential primary season.

PULSE OF THE ELECTORATE

THE OPPORTUNITY VOTE

	COLORADO	TEXAS	VIRGINIA
The Undecided Vote Registered Democrats and Republicans who are voting in primaries, but are undecided on a candidate	26%	20%	14%
The Turnout Vote Registered voters who have yet to decide if they are voting in the primaries	13%	11%	17%
The Opportunity Vote Percentage of state voters who are undecided on who they are voting for -or- are undecided if they will head to the polls on Super Tuesday.	38%	32%	31%

ISSUES BY STATE & PARTY LINES

State

Registered Democrats			Registered Republicans
COLORADO			
Healthcare	51%	49%	National Security/Terrorism
The Economy	32%	35%	Government Spending
Gun Control/Rights	28%	32%	Gun Control/Rights
TEXAS			
The Economy	38%	50%	National Security/Terrorism
Healthcare	36%	38%	Government Spending
Jobs	31%	38%	Immigration
VIRGINIA			
Healthcare	47%	47%	The Economy
The Economy	32%	45%	Government Spending
National Security/Terrorism	31%	41%	National Security/Terrorism

KATZ MEDIA GROUP THE LOCAL VOTE 2016
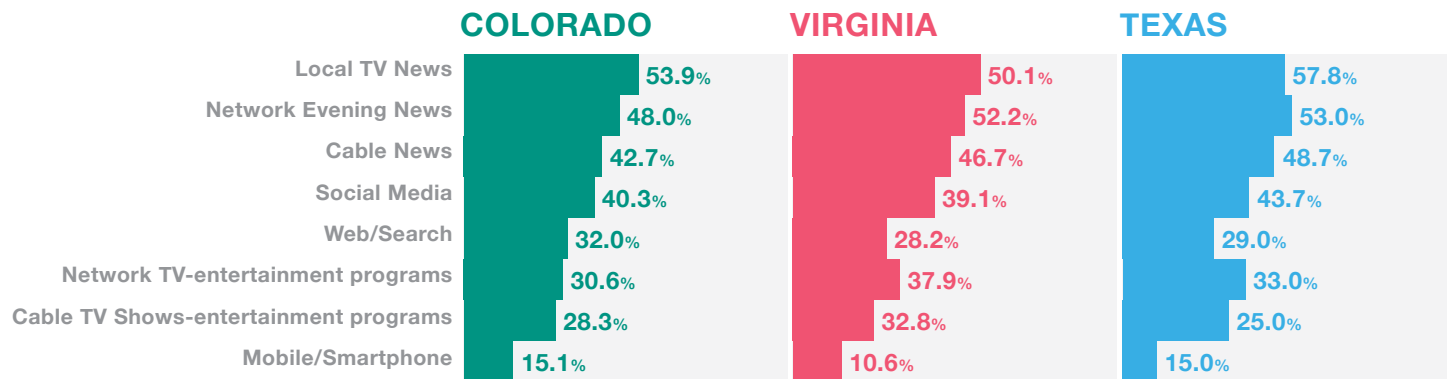
THE POWER OF LOCAL TELEVISION

Local Broadcast and TV News outpace other TV alternatives in reaching opportunity Voters.

%

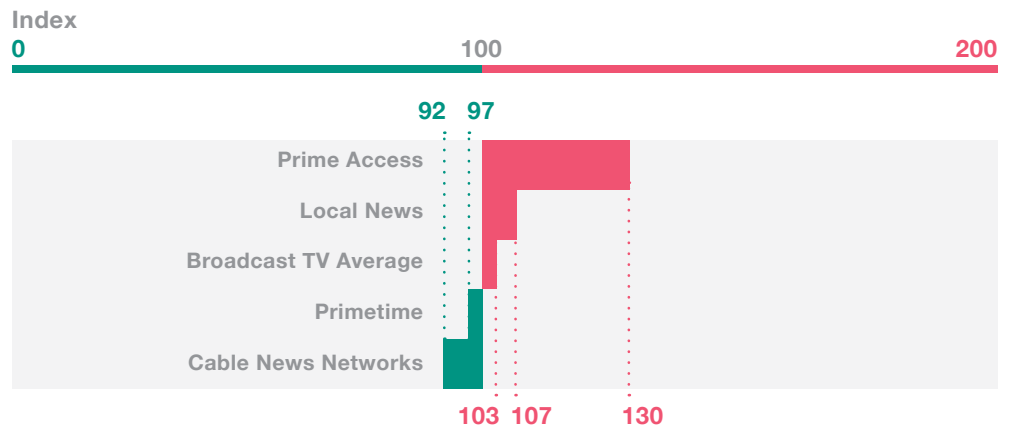|	
89.9	BROADCAST TV
73.5	LOCAL TV NEWS
48.8	NETWORK PRIMETIME
34.6	CABLE NEWS NETWORKS
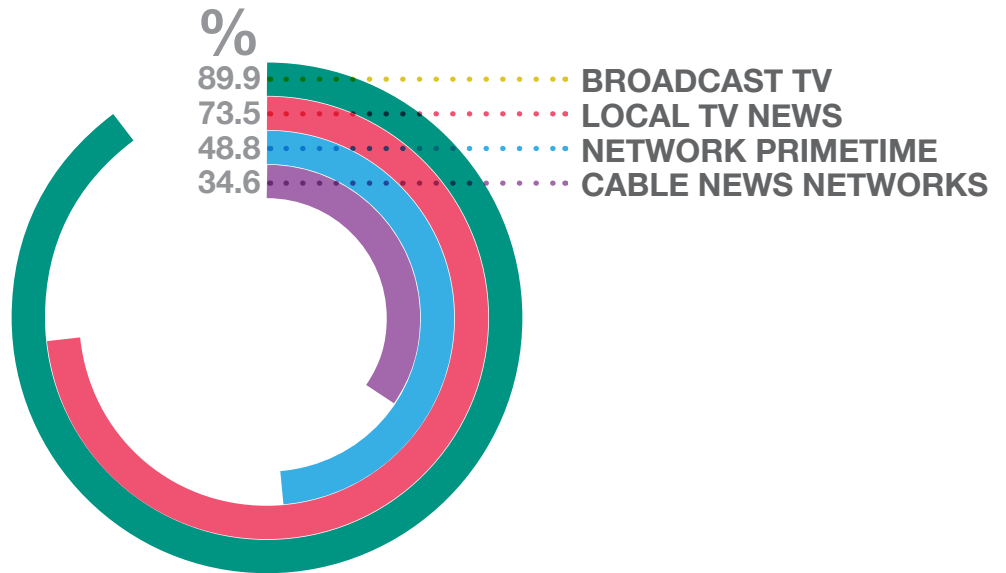
Majority of Voters recommend local TV news for political advertising over all other potential sources of video.

	COLORADO	VIRGINIA	TEXAS
Local TV News	53.9%	50.1%	57.8%
Network Evening News	48.0%	52.2%	53.0%
Cable News	42.7%	46.7%	48.7%
Social Media	40.3%	39.1%	43.7%
Web/Search	32.0%	28.2%	29.0%
Network TV-entertainment programs	30.6%	37.9%	33.0%
Cable TV Shows-entertainment programs	28.3%	32.8%	25.0%
Mobile/Smartphone	15.1%	10.6%	15.0%

Which TV Dayparts Deliver Opportunity Voters? Access & Local News!

Survey Question: In your opinion, which of these are good places for political candidates to run ads that get their message out to people like yourself?

Index

0   100   200

	Index
Prime Access	130
Local News	107
Broadcast TV Average	103
Primetime	97
Cable News Networks	92

TARGETABILITY OF LOCAL TELEVISION

When it comes to targeting voters, local broadcast has powerful new tools to segment your audience and deliver MASS-ively. Here's a snapshot of the differences we see across key markets in Colorado, Texas and Virginia. The pages that follow detail how a variety of Television dayparts (not just News) offer a high density, political target audience for campaigns.

EL PASO
Democrats & Republicans strongest in Prime Access

SAN ANGELO
Democrats & Republicans strong throughout day

ABILENE
Democrats & Republicans strong throughout day

BEAUMONT
Democrats strong throughout the day Republicans strong after 6pm

SAN ANTONIO
Democrat—Daytime Republican—Prime Access

TEXAS

D.C.
Democrats & Republicans strongest in Prime Access

NORFOLK
Democrats strong throughout day Republicans Prime Access

RICHMOND
Democrats strongest in every daypart

ROANOKE
Democrats—Late Night Talk Republicans—Jeopardy/ Wheel of Fortune

VIRGINIA & WASHINGTON, D.C.

TEXAS

ABILENE

BEAUMONT

EL PASO

SAN ANGELO

SAN ANTONIO

Reach your Primary Election Voters in Abilene-Sweetwater by Utilizing TV Dayparts throughout the day!

Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	123	103	124
Daytime	131	106	124
Early Fringe	127	108	127
Prime Access	125	118	127
Prime	120	109	117
Late Fringe	122	113	127

Top TV Programs to reach Abilene-Sweetwater's Primary Election Voters in their Strongest Daypart

Democrat Primary Daytime Shows:

- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber

Republican Primary Prime Access Shows:

- Non-Subscriber
- Non-Subscriber
- Extra (KTXS)
- Non-Subscriber
- Non-Subscriber

Independent Primary Early Fringe:

- Non-Subscriber
- KTXS News 12 @ Five (KTXS)
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
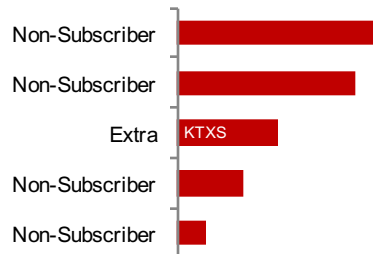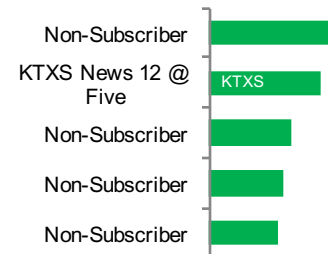
Top 5 Genres of TV Programming to reach Primary Election Voters in Abilene-Sweetwater

Democrat Primary Election Voter:
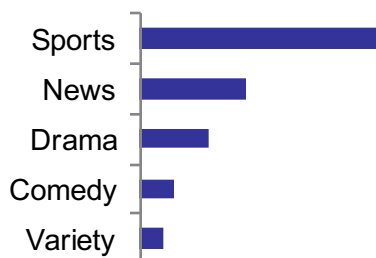
- Sports
- News
- Drama
- Comedy
- Variety

Republican Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Variety

Independent Primary Election Voter:

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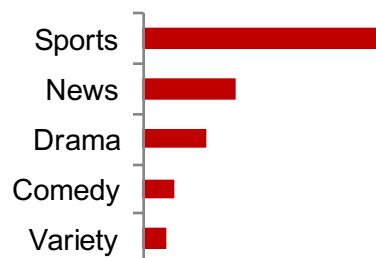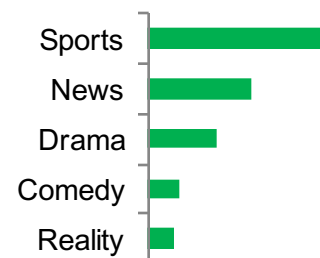
Source: comScore Local Nov'15 Abilene-Sweetwater Political; HH Ratings with Political Personas; Time Periods: Early Morning (M-F 5a-8a), Daytime (M-F 8a-3p), Early Fringe (M-F 3p-6p), Prime Access (M-F 6p-7p), Prime (M-Su 7p-10p), Late Fringe (M-F 10p-1a); Index = Political Persona Rating vs HH Rating,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

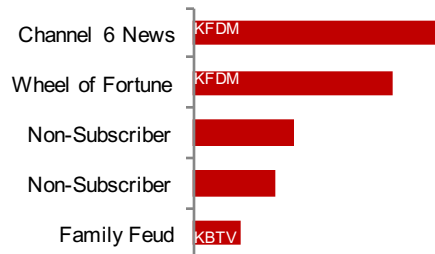# Reach your Primary Election Voters in Beaumont by Utilizing TV Dayparts throughout the day!

Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	131	99	120
Daytime	129	88	103
Early Fringe	132	98	109
Prime Access	129	112	117
Prime	120	110	115
Late Fringe	122	105	92

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

Democrat Primary Early Fringe Shows:
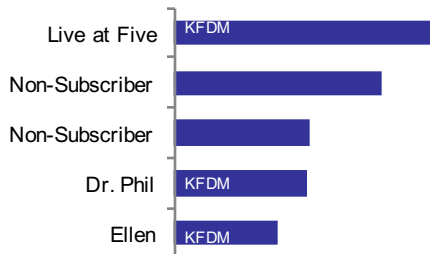
Live at Five	KFDM
Non-Subscriber	
Non-Subscriber	
Dr. Phil	KFDM
Ellen	KFDM

Republican Primary Prime Access Shows:

Channel 6 News	KFDM
Wheel of Fortune	KFDM
Non-Subscriber	
Non-Subscriber	
Family Feud	KBTV

Independent Primary Early Morning Shows:

Non-Subscriber	
Non-Subscriber	
CBS This Morning	KFDM
Non-Subscriber	
Non-Subscriber	
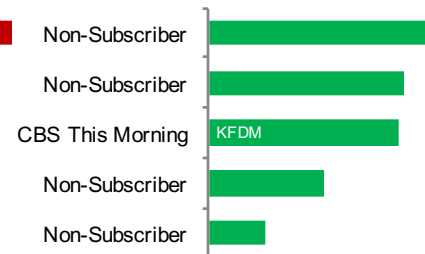
Top 5 Genres of TV Programming to reach Primary Election Voters in Beaumont

Democrat Primary Election Voter:
- Sports
- News
- Drama
- Comedy
- Reality
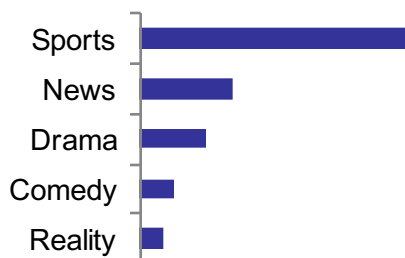
Republican Primary Election Voter:
- Sports
- News
- Drama
- Comedy
- Reality

Independent Primary Election Voter:
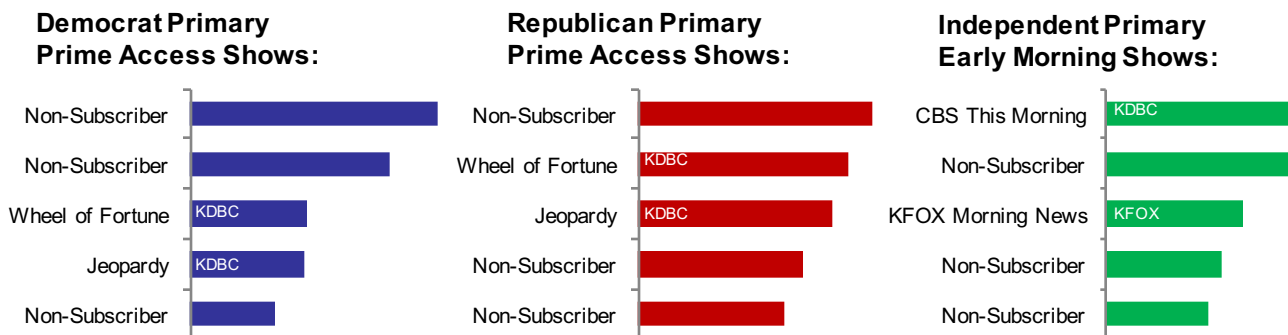- Sports
- News
- Drama
- Comedy
- Variety
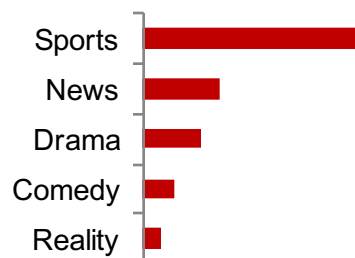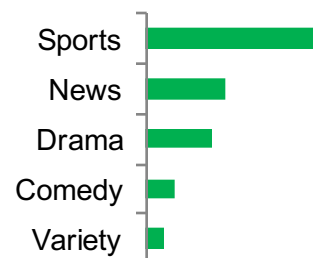
Source: comScore Local Nov'15 Beaumont Political; HH Ratings with Political Personas; Time Periods: Early Morning (M-F 5a-8a), Daytime (M-F 8a-3p), Early Fringe (M-F 3p-6p), Prime Access (M-F 6p-7p), Prime (M-Su 7p-10p), Late Fringe (M-F 10p-1a); Index = Political Persona Rating vs HH Rating, HH Rating for Programming and Genre. Non-subscribers to comScore Local data depicted but not identified.
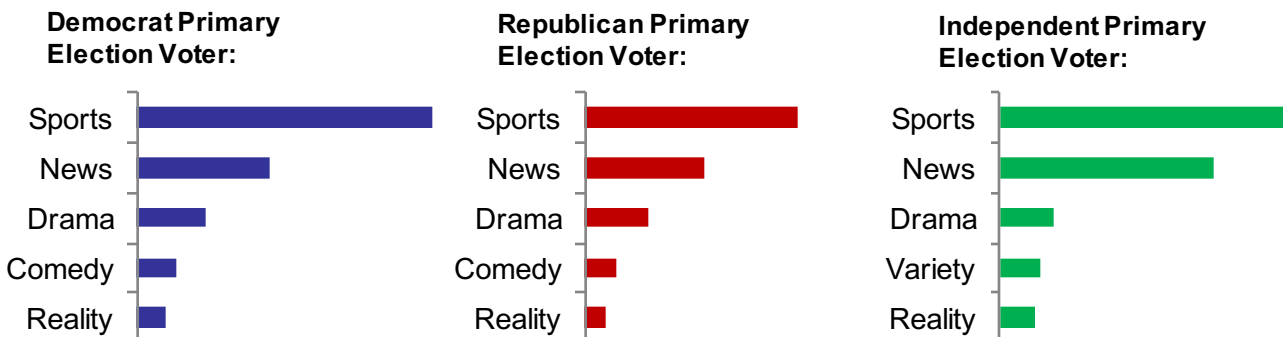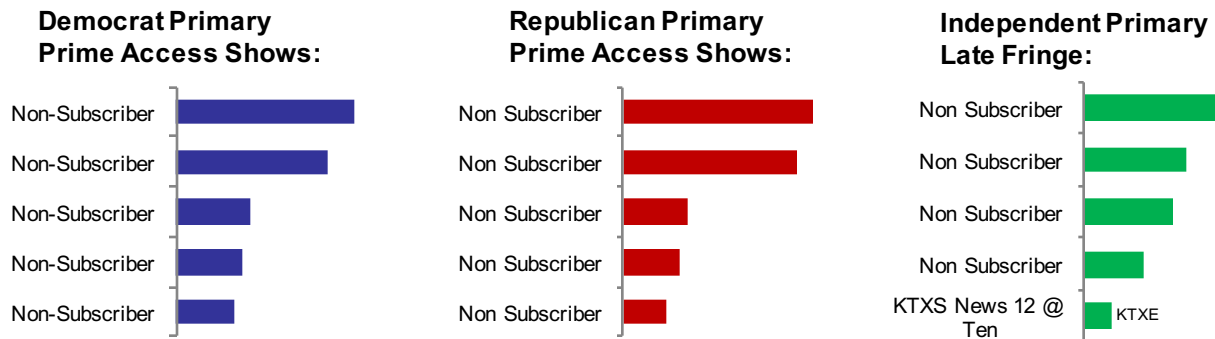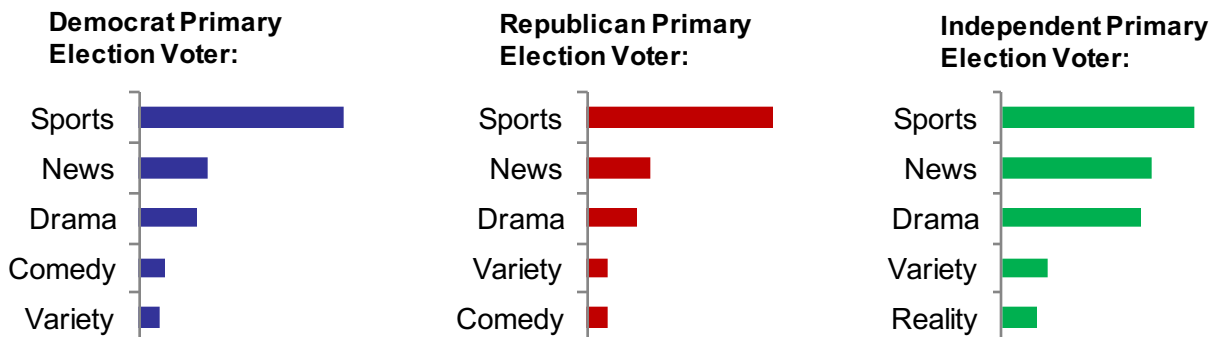
Reach your Primary Election Voters in El Paso by Utilizing TV Dayparts throughout the day!

Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	126	102	121
Daytime	126	95	112
Early Fringe	130	102	107
Prime Access	133	112	86
Prime	122	102	101
Late Fringe	121	101	94

Top TV Programs to reach El Paso's Primary Election Voters in their Strongest Daypart

Democrat Primary Prime Access Shows:

Non-Subscriber	
Non-Subscriber	
Wheel of Fortune	KDBC
Jeopardy	KDBC
Non-Subscriber	

Republican Primary Prime Access Shows:

Non-Subscriber	
Wheel of Fortune	KDBC
Jeopardy	KDBC
Non-Subscriber	
Non-Subscriber	

Independent Primary Early Morning Shows:

CBS This Morning	KDBC
Non-Subscriber	
KFOX Morning News	KFOX
Non-Subscriber	
Non-Subscriber	

Top 5 Genres of TV Programming to reach Primary Election Voters in El Paso

Democrat Primary Election Voter:
- Sports
- News
- Drama
- Comedy
- Reality

Republican Primary Election Voter:
- Sports
- News
- Drama
- Comedy
- Reality

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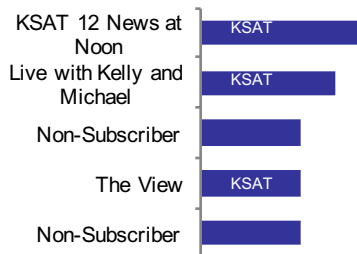
Source: comScore Local Nov'15 El Paso Political; HH Ratings with Political Personas; Time Periods: Early Morning (M-F 5a-8a), Daytime (M-F 8a-3p), Early Fringe (M-F 3p-6p), Prime Access (M-F 6p-7p), Prime (M-Su 7p-10p), Late Fringe (M-F 10p-1a); Index = Political Persona Rating vs HH Rating, HH Rating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

Reach your Primary Election Voters in San Angelo, TX by Utilizing TV Dayparts throughout the day!
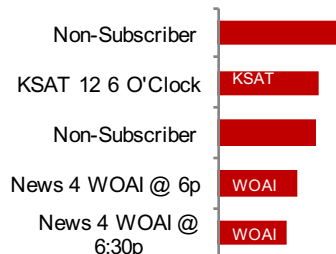
Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	114	118	137
Daytime	124	114	132
Early Fringe	129	106	125
Prime Access	131	121	139
Prime	129	116	136
Late Fringe	126	118	143

Top TV Programs to reach San Angelo's Primary Election Voters in their Strongest Daypart

Democrat Primary Prime Access Shows:

Non-Subscriber	
Non-Subscriber	
Non-Subscriber	
Non-Subscriber	
Non-Subscriber	

Republican Primary Prime Access Shows:

Non Subscriber	
Non Subscriber	
Non Subscriber	
Non Subscriber	
Non Subscriber	

Independent Primary Late Fringe:

Non Subscriber	
Non Subscriber	
Non Subscriber	
Non Subscriber	
KTXS News 12 @ Ten	KTXE

Top 5 Genres of TV Programming to reach Primary Election Voters in San Angelo

Democrat Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Variety

Republican Primary Election Voter:

- Sports
- News
- Drama
- Variety
- Comedy

Independent Primary Election Voter:

- Sports
- News
- Drama
- Variety
- Reality

KATZ MEDIA GROUP   THE LOCAL VOTE 2016

Reach your Primary Election Voters in San Antonio by Utilizing TV Dayparts throughout the day!

Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	123	103	133
Daytime	133	100	113
Early Fringe	132	102	110
Prime Access	129	111	123
Prime	123	104	112
Late Fringe	125	102	107

Top TV Programs to reach San Antonio's Primary Election Voters in their Strongest Daypart

Democrat Primary Daytime Shows:

- KSAT 12 News at Noon — KSAT
- Live with Kelly and Michael — KSAT
- Non-Subscriber
- The View — KSAT
- Non-Subscriber

Republican Primary Prime Access Shows:

- Non-Subscriber
- KSAT 12 6 O'Clock — KSAT
- Non-Subscriber
- News 4 WOAI @ 6p — WOAI
- News 4 WOAI @ 6:30p — WOAI

Independent Primary Early Morning Shows:

- Good Morning San Antonio — KSAT
- Good Morning America — KSAT
- News 4 WOAI @ 6a — WOAI
- Non-Subscriber
- Today — WOAI
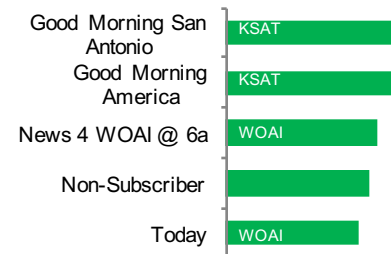
Top 5 Genres of TV Programming to reach Primary Election Voters in San Antonio

Democrat Primary Election Voter:
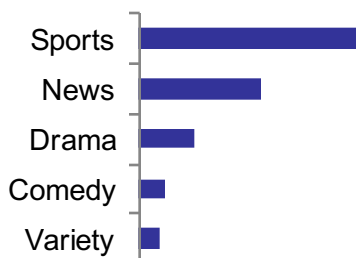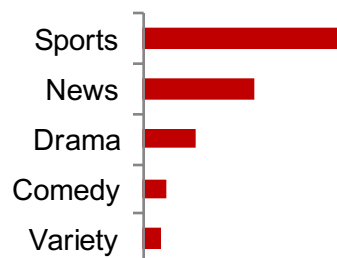
- Sports
- News
- Drama
- Comedy
- Variety

Republican Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Variety

Independent Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Variety

VIRGINIA

NORFOLK

RICHMOND

ROANOKE

WASHINGTON, DC

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

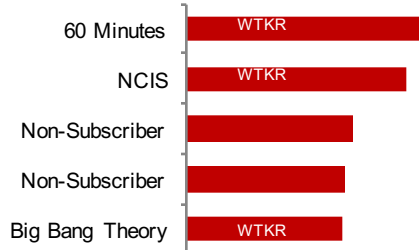| Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	122	86	109
Daytime	133	80	100
Early Fringe	131	92	109
Prime Access	129	104	121
Prime	121	107	118
Late Fringe	127	99	112

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

Democrat Primary Daytime Shows:

- News Ch 3 @ Noon — WTKR
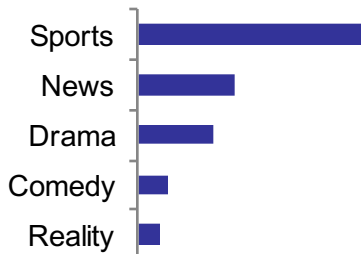- Young & the Restless — WTKR
- Price is Right — WTKR
- Bold & Beautiful — WTKR
- Non-Subscriber

Republican Primary Prime Shows:

- 60 Minutes — WTKR
- NCIS — WTKR
- Non-Subscriber
- Non-Subscriber
- Big Bang Theory — WTKR

Independent Primary Prime Access Shows:

- Non-Subscriber
- Inside Edition — WTKR
- The Insider — WTKR
- WGNT News — WGNT
- Modern Family — WTVZ
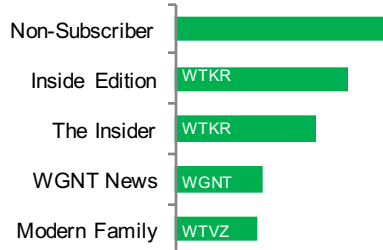
Top 5 Genres of TV Programming to reach Primary Election Voters in Norfolk

Democrat Primary Election Voter:
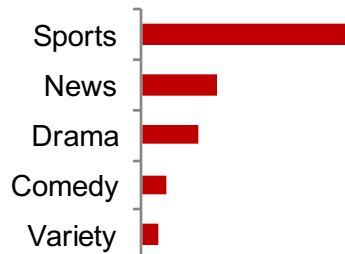
- Sports
- News
- Drama
- Comedy
- Reality

Republican Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Variety

Independent Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Variety

KATZ MEDIA GROUP — THE LOCAL VOTE 2016

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

Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	128	101	130
Daytime	141	96	116
Early Fringe	139	105	122
Prime Access	138	113	136
Prime	128	108	129
Late Fringe	132	101	119

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

Democrat Primary Daytime Shows:

- CBS 6 News @ Noon — WTVR
- Young & Restless — WTVR
- Non-Subscriber
- Price is Right — WTVR
- Today Show 2 — WWBT

Republican Primary Prime Access Shows:

- Non-Subscriber
- Non-Subscriber
- Ent. Tonight — WWBT
- Inside Edition — WWBT
- CBS 6 News @ 7p — WTVR

Independent Primary Prime Access Shows:

- Non-Subscriber
- Non-Subscriber
- Ent. Tonight — WWBT
- Inside Edition — WWBT
- CBS 6 News @ 7 — WTVR

Top 5 Genres of TV Programming to reach Primary Election Voters in Richmond

Democrat Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Reality

Republican Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Variety

Independent Primary Election Voter:

- News
- Sports
- Drama
- Variety
- Game

Source: comScore Local Nov'15 Richmond Political; HH Ratings with Political Personas; Time Periods: Early Morning (M-F 6a-9a), Daytime (M-F 9a-4p), Early Fringe (M-F 4p-7p), Prime Access (M-F 7p-8p), Prime (M-Su 8p-11p), Late Fringe (M-F 11p-2a); Index = Political Persona Rating vs HH Rating, HH Rating for Programming and Genre. Non-subscribers to comScore Local data depicted but not identified.
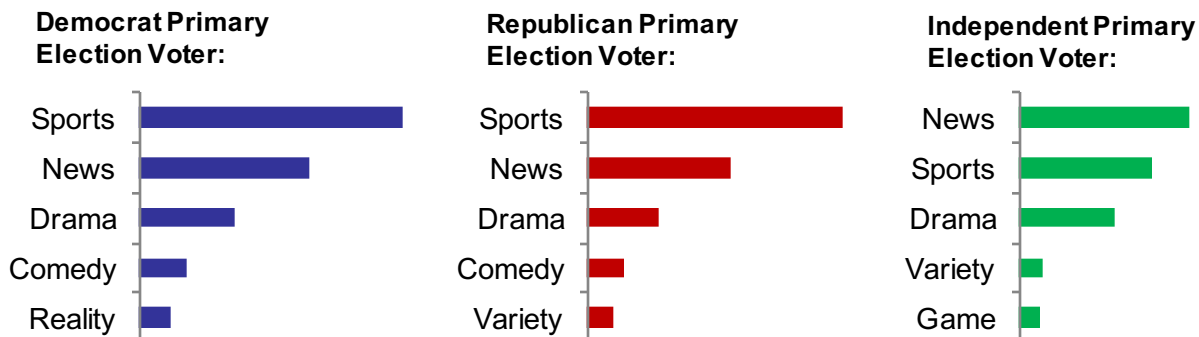
Reach your Primary Election Voters in Roanoke by Utilizing TV Dayparts throughout the day!
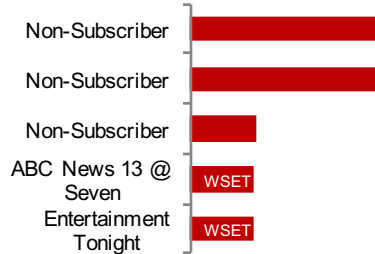
Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	109	95	103
Daytime	115	89	100
Early Fringe	118	100	108
Prime Access	115	106	118
Prime	115	104	114
Late Fringe	118	101	113

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

Democrat Primary Late Fringe Shows:

- ABC 13 News @ 11 — WSET
- Non-Subscriber
- Non-Subscriber
- Jimmy Kimmel Live — WSET
- Nightline — WSET

Republican Primary Prime Access Shows:

- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- ABC News 13 @ Seven — WSET
- Entertainment Tonight — WSET

Independent Primary Prime Access Shows:

- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
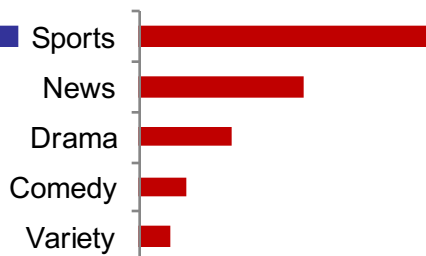- Entertainment Tonight — WSET
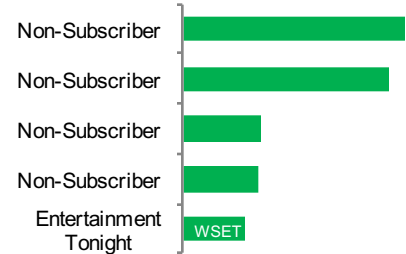
Top 5 Genres of TV Programming to reach Primary Election Voters in Roanoke

Democrat Primary Election Voter:
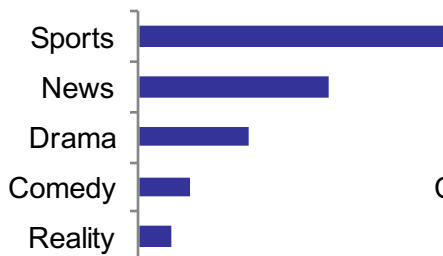
- Sports
- News
- Drama
- Comedy
- Reality

Republican Primary Election Voter:

- Sports
- News
- Drama
- Comedy
- Variety

Independent Primary Election Voter:
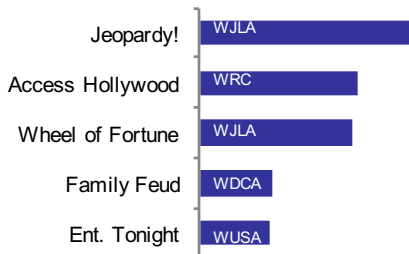

- Sports
- News
- Drama
- Comedy
- Reality
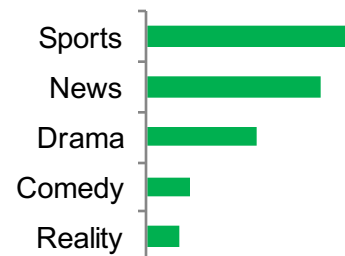
Source: comScore Local Nov'15 Roanoke Political; HH Ratings with Political Personas; Time Periods: Early Morning (M-F 6a-9a), Daytime (M-F 9a-4p), Early Fringe (M-F 4p-7p), Prime Access (M-F 7p-8p), Prime (M-Su 8p-11p), Late Fringe (M-F 11p-2a); Index = Political Persona Rating vs HH Rating, HH Rating for Programming and Genre. Non-subscribers to comScore local data depicted but not identified.

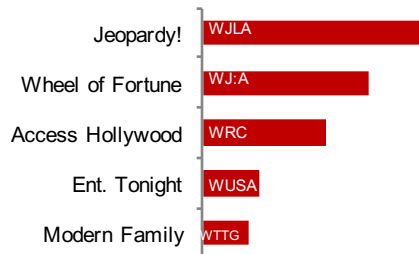# Reach your Primary Election Voters in Washington, DC by Utilizing TV Dayparts throughout the day!

Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	107	91	109
Daytime	110	86	101
Early Fringe	113	96	111
Prime Access	121	106	116
Prime	114	105	110
Late Fringe	118	99	105

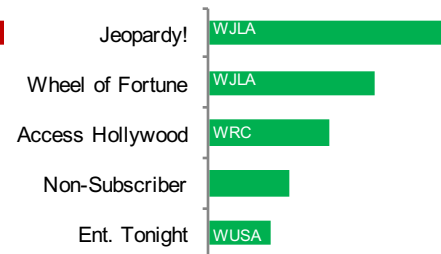## Top TV Programs to reach Washington DC's Primary Election Voters in their Strongest Daypart

Democrat Primary Prime Access Shows:

Show	Station
Jeopardy!	WJLA
Access Hollywood	WRC
Wheel of Fortune	WJLA
Family Feud	WDCA
Ent. Tonight	WUSA

Republican Primary Prime Access Shows:

Show	Station
Jeopardy!	WJLA
Wheel of Fortune	WJ:A
Access Hollywood	WRC
Ent. Tonight	WUSA
Modern Family	WTTG

Independent Primary Prime Access Shows:

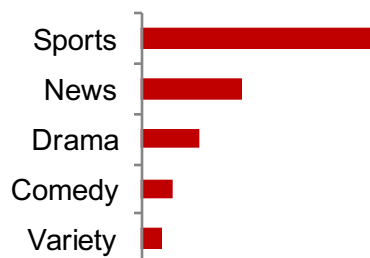| Show	Station
Jeopardy!	WJLA
Wheel of Fortune	WJLA
Access Hollywood	WRC
Non-Subscriber	
Ent. Tonight	WUSA

Top 5 Genres of TV Programming to reach Primary Election Voters in Washington, DC

Democrat Primary Election Voter:
- Sports
- News
- Drama
- Comedy
- Variety
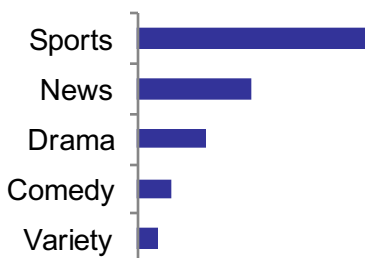
Republican Primary Election Voter:
- Sports
- News
- Drama
- Comedy
- Variety

Independent Primary Election Voter:
- News
- Sports
- Drama
- Comedy
- Variety
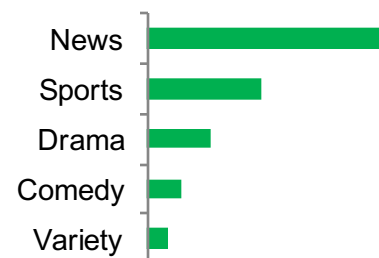
Source: comScore Local Nov'15 Washington, DC Political; HH Ratings with Political Personas; Time Periods: Early Morning (M-F 6a-9a), Daytime (M-F 9a-4p), Early Fringe (M-F 4p-7p), Prime Access (M-F 7p-8p), Prime (M-Su 8p-11p), Late Fringe (M-F 11p-2a); Index = Political Persona Rating vs HH Rating, HH Rating for Programming and Genre. Non-subscribers to comScore Local data depicted but not identified.