



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.

KEY INSIGHTS

- Across the 10 states that Katz Media 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.
- **Local News** is entrenched in the daily lives of voters, regardless of the specific issues they care about. 7 out of 10 primary-goers watch their Local newscasts on a regular basis (69%). This percentage is higher than other news-related content such as Newspaper (58%) and National Cable News (42%).
- Weekly viewership of Local TV News is highest among primary-goers who say **Social Security** is a top issue that influences their vote (77%), followed by Jobs (73%) and National Security (72%).
- In the state of Pennsylvania, 4 out of 10 eligible 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.
- 9 in 10 Opportunity Voters in Pennsylvania watch **Broadcast TV** which outpaces other TV alternatives.
- 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.

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 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



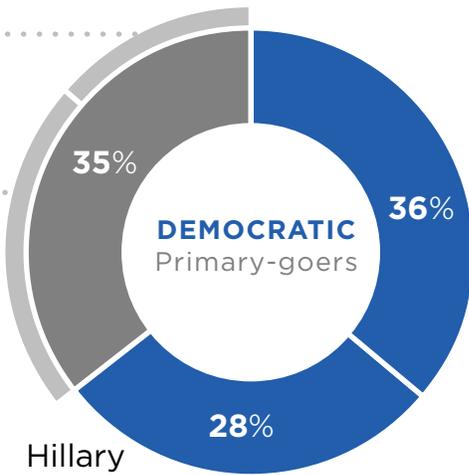
While Bernie Sanders and Donald Trump have small leads, 35% of primary-goers are still undecided on whom they are voting for. When prompted to make an immediate decision, these Undecideds are favoring Hillary Clinton and Donald Trump.

Undecided

but if they had to choose today

38%
Bernie Sanders

62%
Hillary Clinton



Bernie Sanders

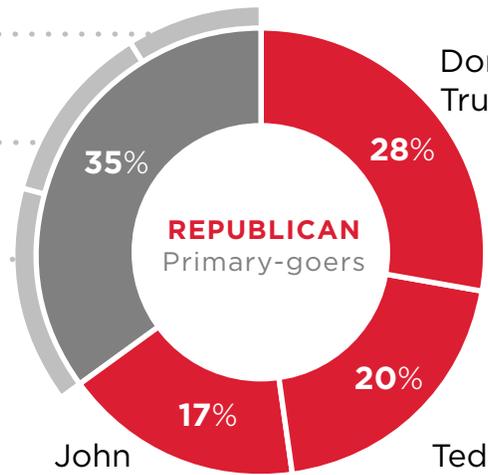
Undecided

but if they had to choose today

25%
Ted Cruz

34%
John Kasich

41%
Donald Trump



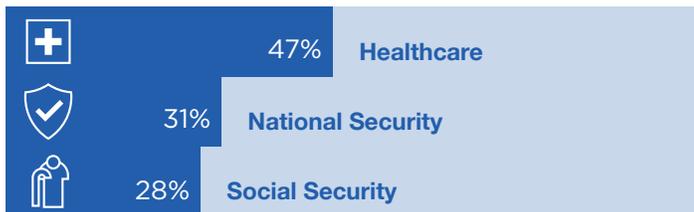
Donald Trump

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)

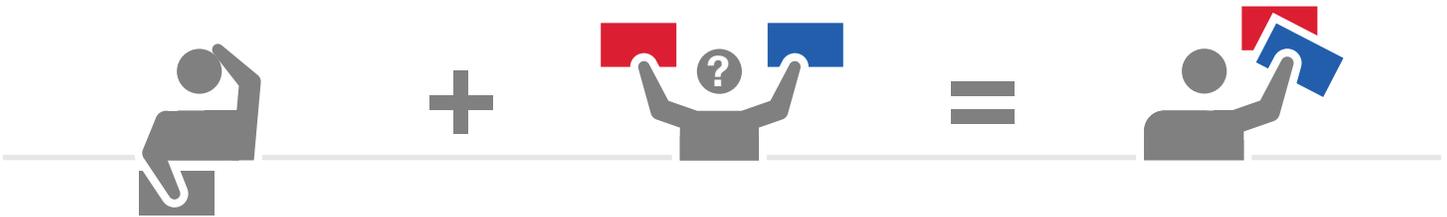
Q: Below is a list of issues facing our nation. Select the top 3 issues that would most influence who you vote for in the Presidential election.

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.

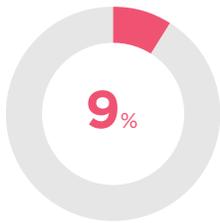
THE OPPORTUNITY VOTE



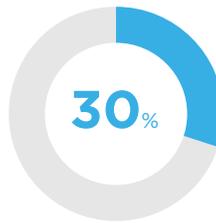
Getting Pennsylvania voters to turn out and influencing those who are undecided are critical goals for political campaigns



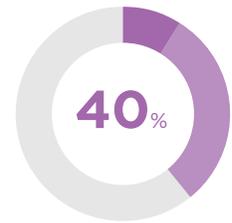
The **Turnout** Vote
Percentage of eligible voters who have yet to decide if they are voting in the primaries



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

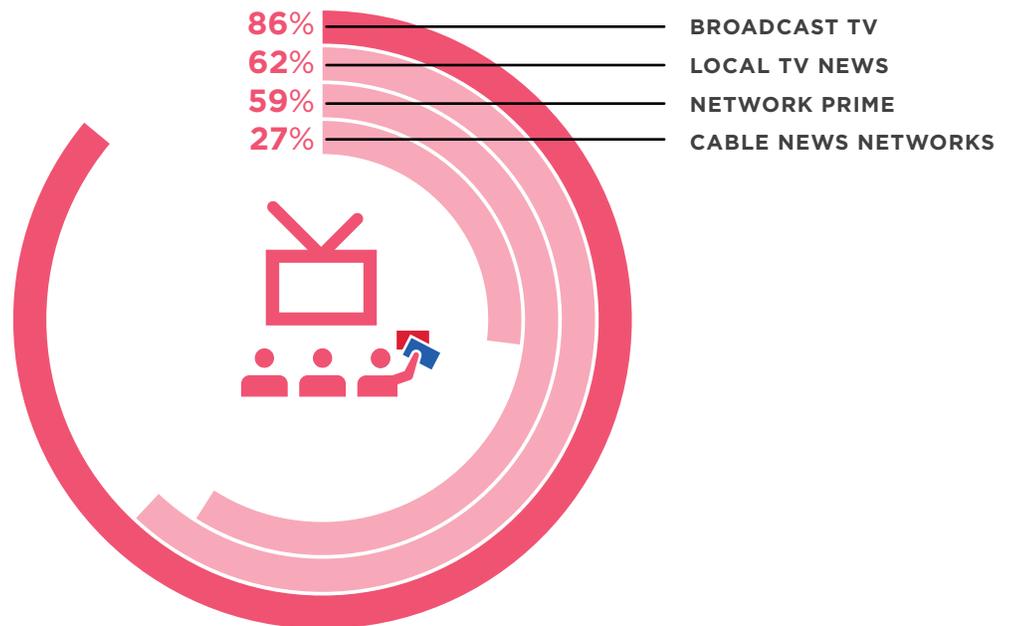


The **Opportunity** Vote
Percentage of eligible voters who are unsure if they are going to vote -or- do plan to vote, but are undecided on a candidate



The Power of Local Television

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

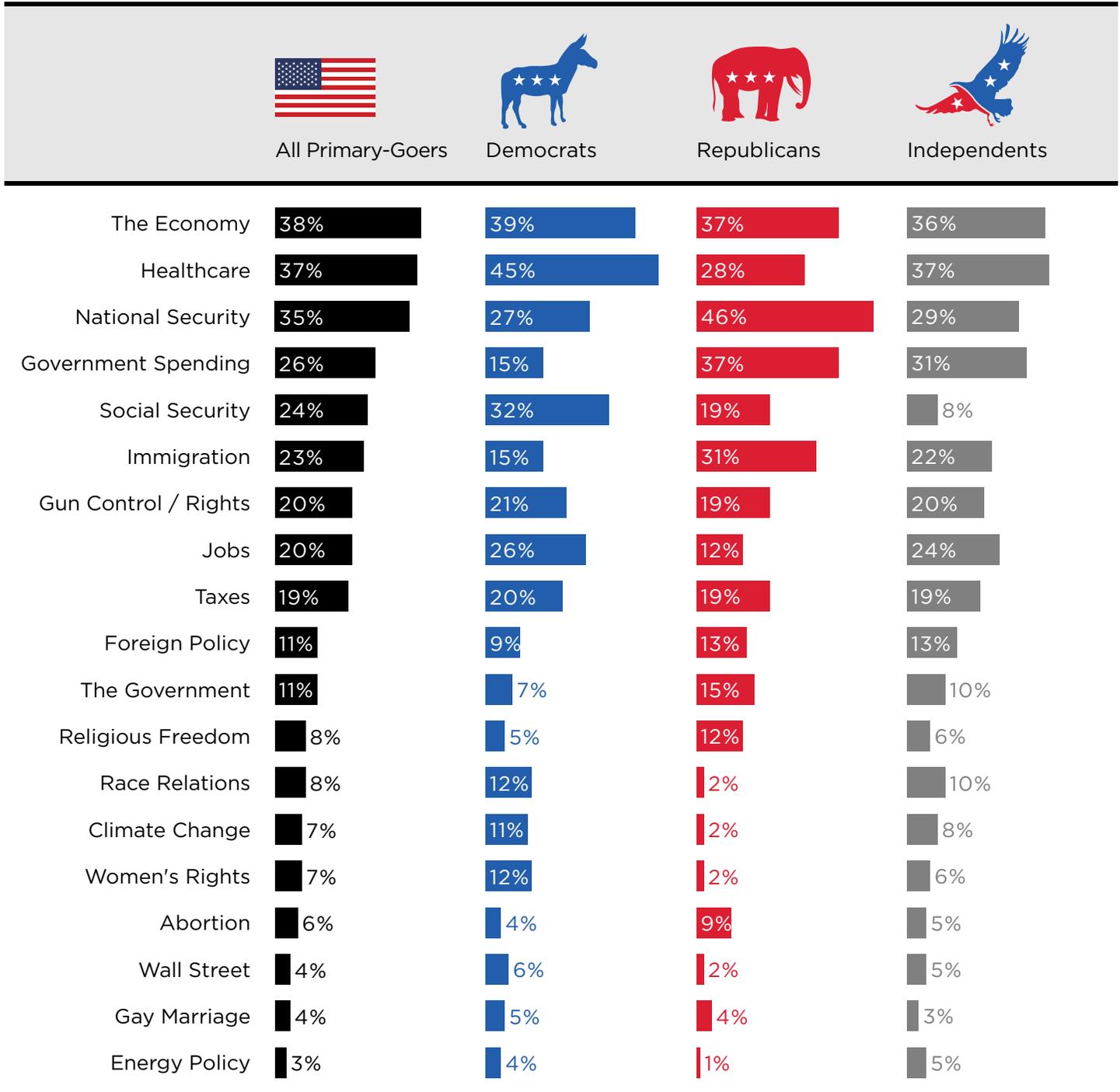


Source: The Local Vote 2016. Katz Media Group/Nielsen study of 351 registered voters in Pennsylvania. Interviews conducted March 28 to April 5, 2016.

IMPORTANCE OF ISSUES

BY PARTY AFFILIATION

% THAT SAY ISSUE IS A TOP FACTOR IMPACTING THEIR VOTE

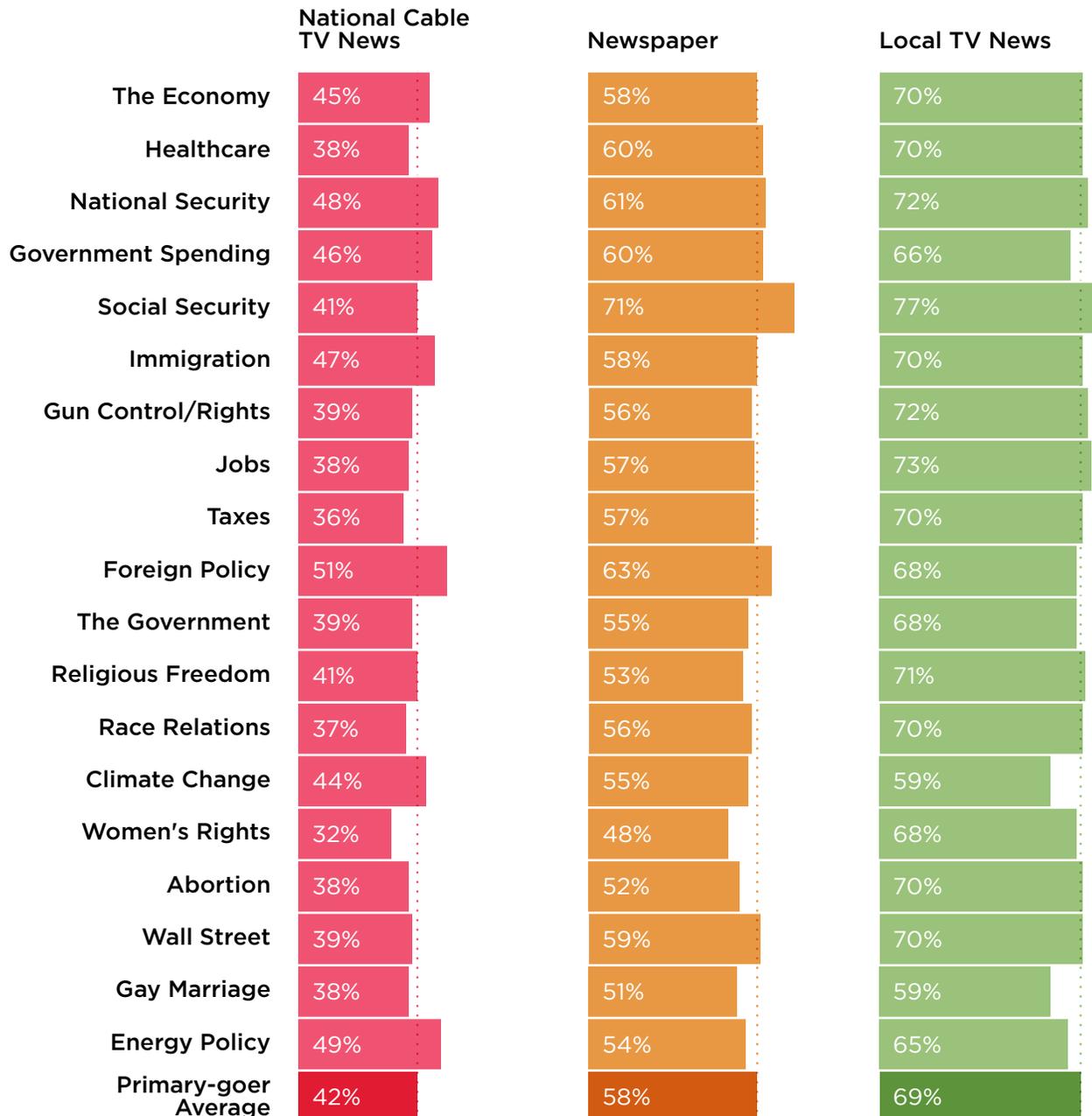


Q: Below is a list of issues facing our nation. Select the top 3 issues that would most influence who you vote for in the Presidential election.
 Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, 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.

THE DOMINANCE OF LOCAL TV NEWS

Where to speak to voters about the issues they care about

WEEKLY USAGE AMONG PRIMARY-GOERS WHO SAY A PARTICULAR ISSUE IMPACTS THEIR VOTE

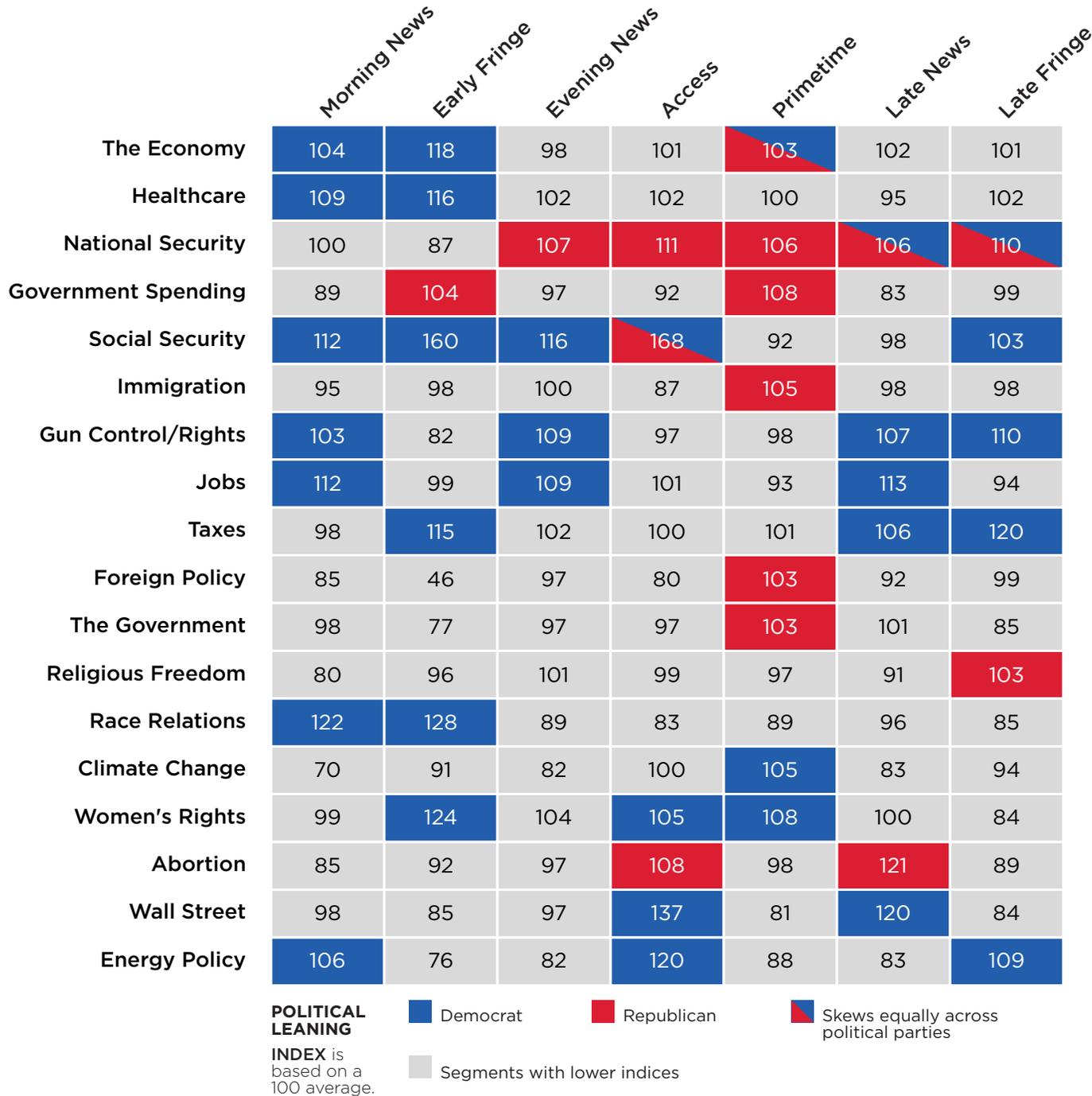


To be read: Of primary-goers who say National Security impacts their candidate choice, 72% are viewers of their Local TV News, 61% read Newspapers and 48% watch national Cable News channels.

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 primary-goers. Interviews conducted January 25 to April 5, 2016.

LOCAL TV = TARGETABILITY

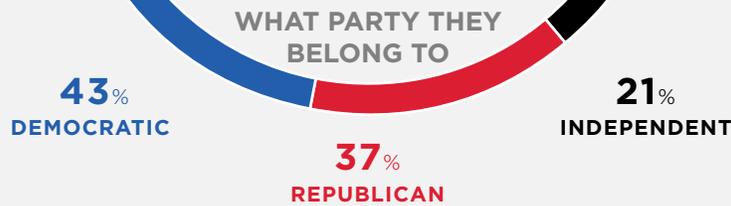
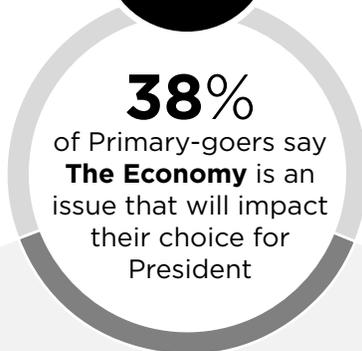
USING LOCAL DAYPARTS TO TARGET VOTERS BY THE ISSUES THEY CARE ABOUT



To be read: Primary-goers who say National Security impacts their candidate choice are 7% more likely to watch their Local Evening News than the typical primary-goer. Primary-goers who say National Security impacts their candidate choice and watch their Local Evening News 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: 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



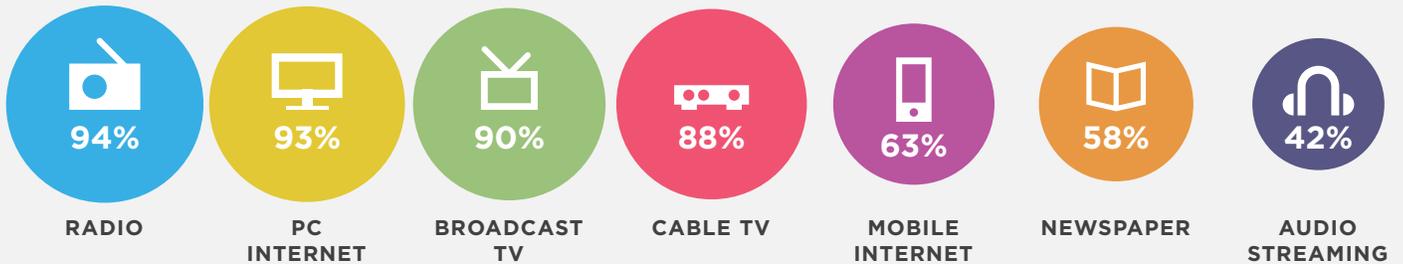
WHO THEY ARE VOTING FOR



More Important ← HOW THEY SKEW DEMOGRAPHICALLY → Less Important



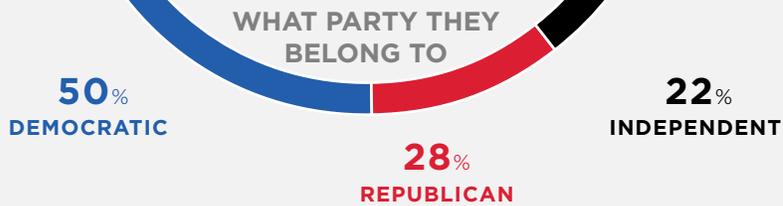
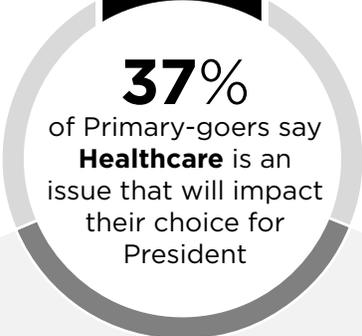
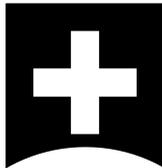
WHAT MEDIA PLATFORMS THEY USE



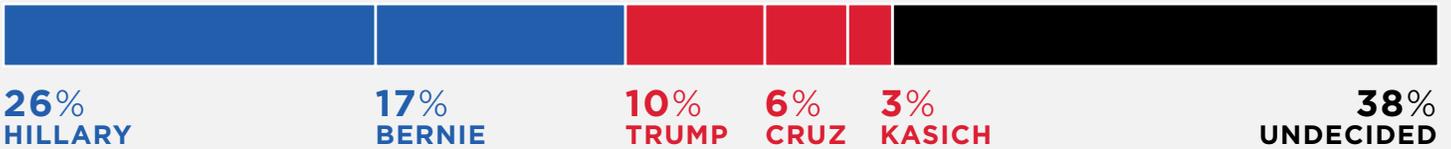
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. Audio Streaming = Local Radio, Pureplays and Music Streaming Services.

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 1,190 primary-goers who are influenced by the issue of The Economy. Interviews conducted January 25 to April 5, 2016.

IN THE INTEREST OF HEALTHCARE

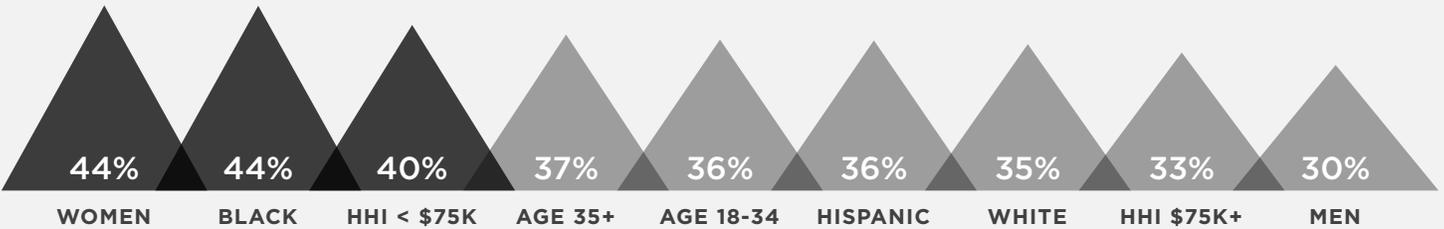


WHO THEY ARE VOTING FOR

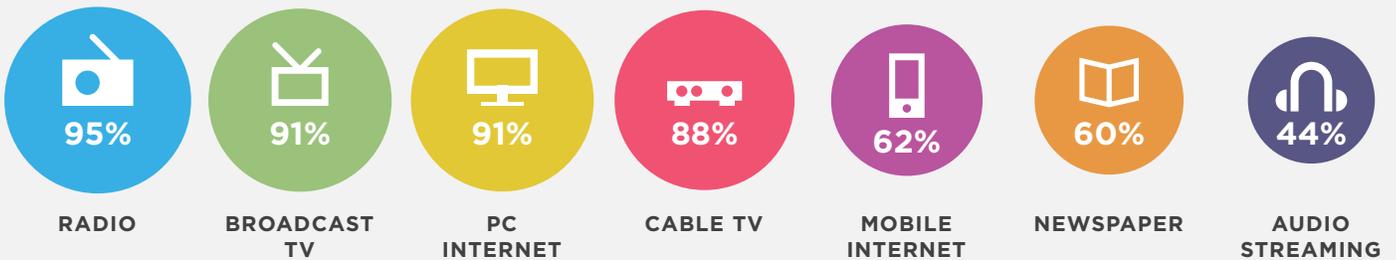


HOW THEY SKEW DEMOGRAPHICALLY

More Important ← → Less Important



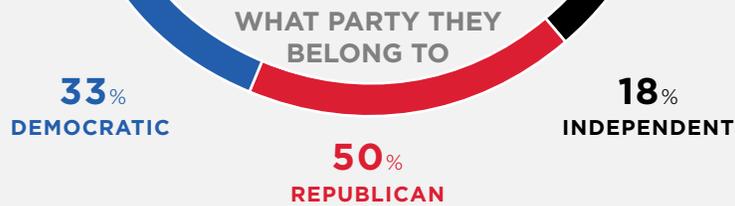
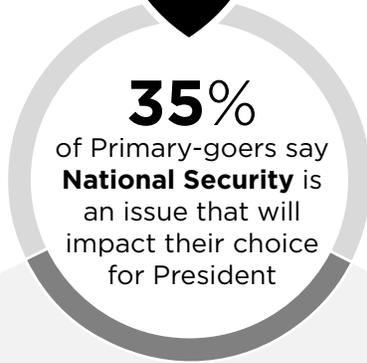
WHAT MEDIA PLATFORMS THEY USE



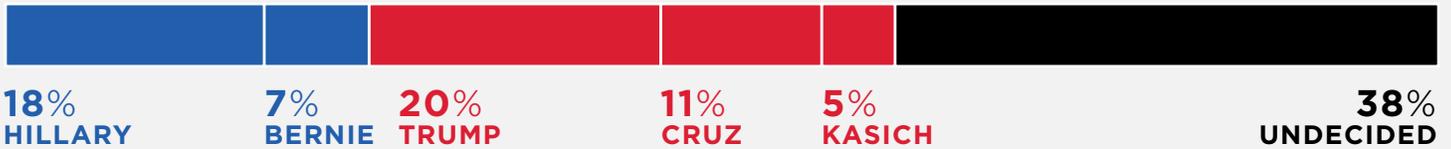
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. Audio Streaming = Local Radio, Pureplays and Music Streaming Services.

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.

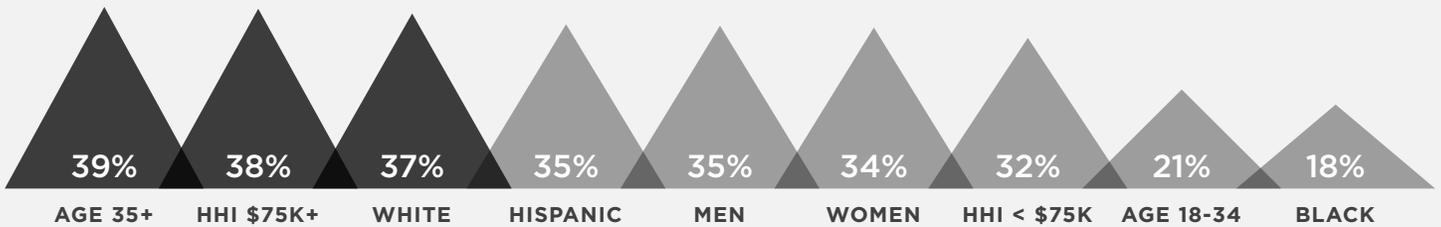
IN THE INTEREST OF
NATIONAL SECURITY



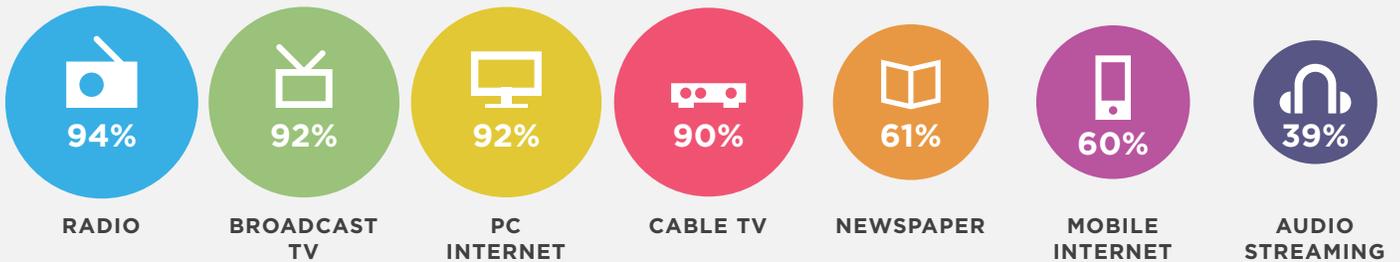
WHO THEY ARE VOTING FOR



More Important ← HOW THEY SKEW DEMOGRAPHICALLY → Less Important



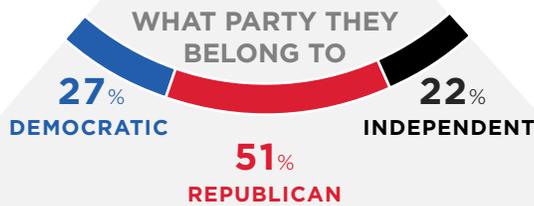
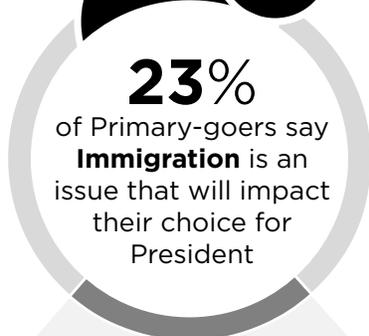
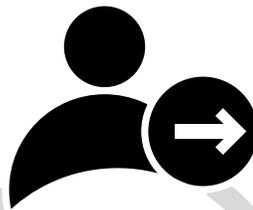
WHAT MEDIA PLATFORMS THEY USE



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

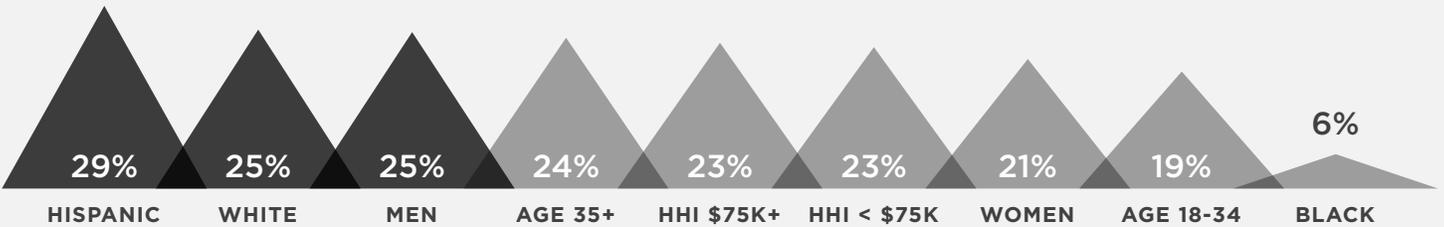


WHO THEY ARE VOTING FOR

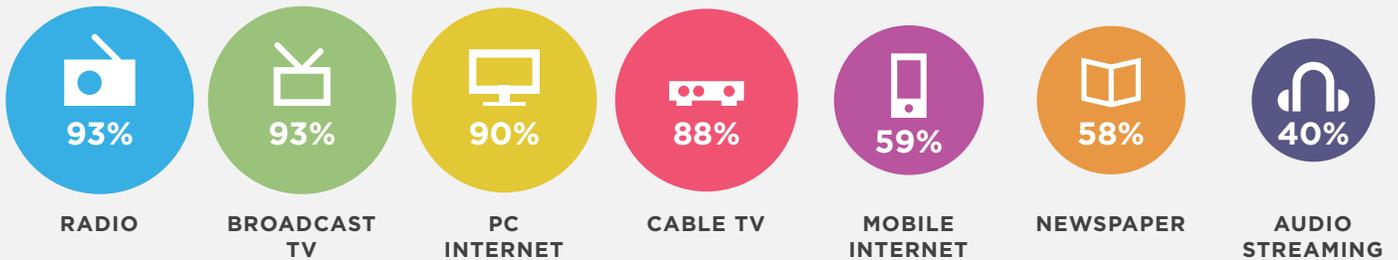


HOW THEY SKEW DEMOGRAPHICALLY

More Important ← → Less Important



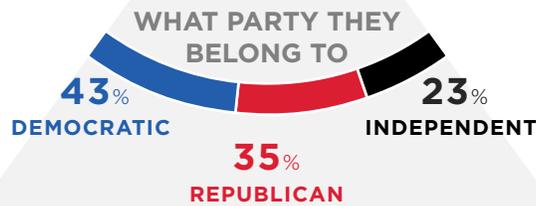
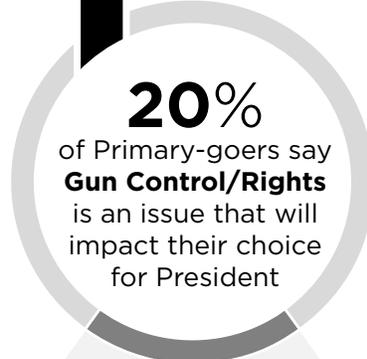
WHAT MEDIA PLATFORMS THEY USE



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**



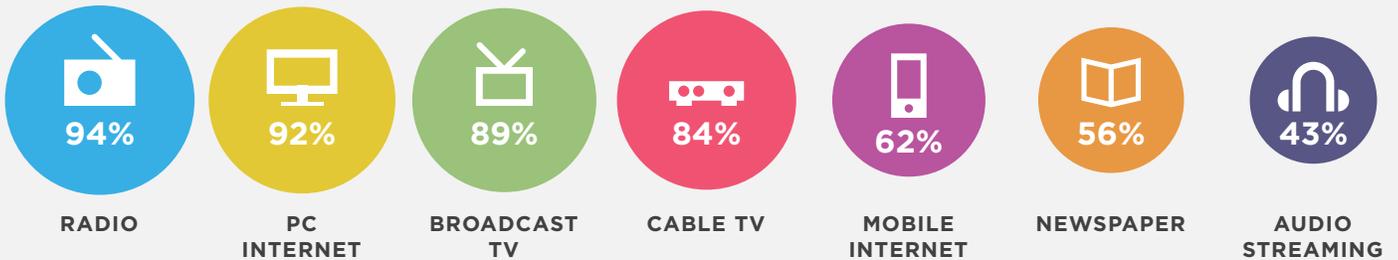
WHO THEY ARE VOTING FOR



More Important ← HOW THEY SKEW DEMOGRAPHICALLY → Less Important



WHAT MEDIA PLATFORMS THEY USE



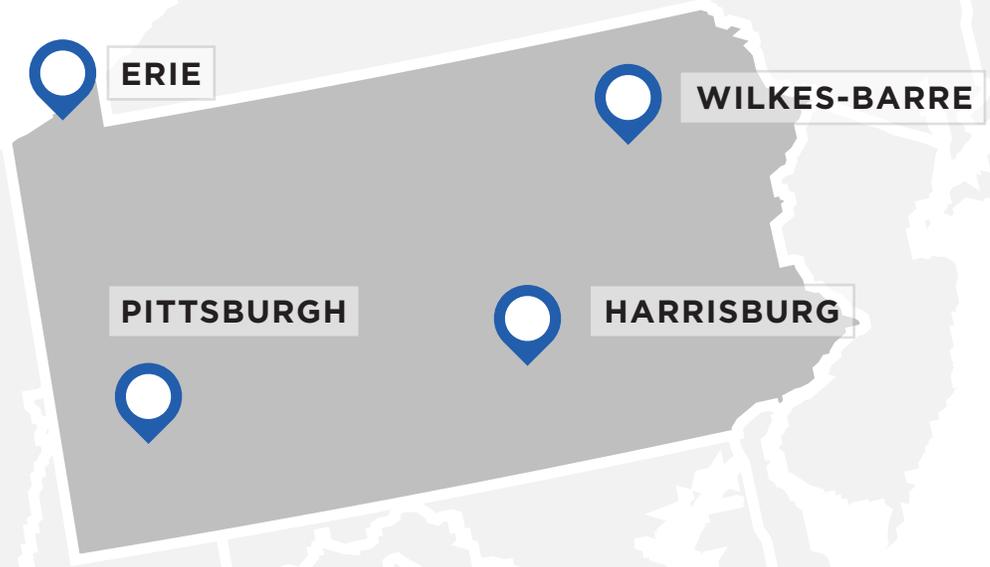
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. Audio Streaming = Local Radio, Pureplays and Music Streaming Services.

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 TV

POLITICAL LEANING

-  DEMOCRAT
-  REPUBLICAN
-  INDEPENDENT



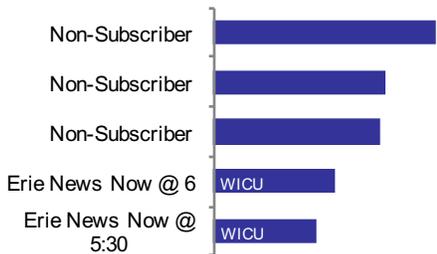
When it comes to targeting voters, local broadcast has powerful new tools to segment your audience and deliver MASSively. Here's a snapshot of the differences we see across key markets in Pennsylvania. **TV offers a high density, political target audience for campaigns.**

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

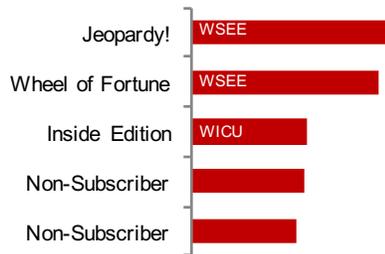
Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	123	103	84
Daytime	120	97	81
Early Fringe	126	104	95
Prime Access	123	106	100
Prime	119	105	96
Late Fringe	120	100	74

Top TV Programs to Reach Erie's Primary Election Voters in their Strongest Daypart

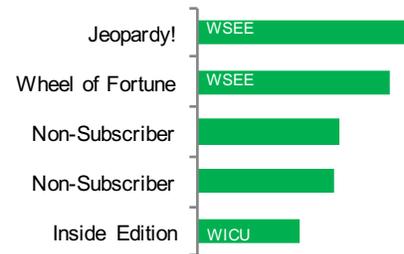
**Democrat Primary
Early Fringe Shows:**



**Republican Primary
Prime Access Shows:**

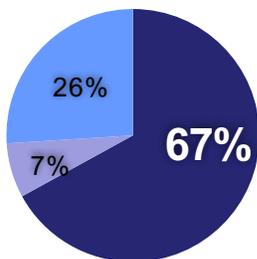


**Independent Primary
Prime Access Shows:**

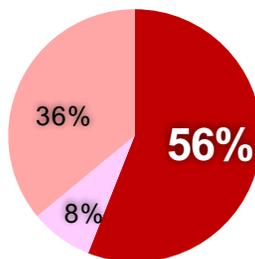


Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:

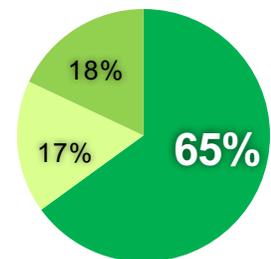
**Democrat Primary Election
Voter in Early Fringe*:**



**Republican Primary Election
Voter in Prime Access:**



**Independent Primary Election
Voter in Prime Access:**



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

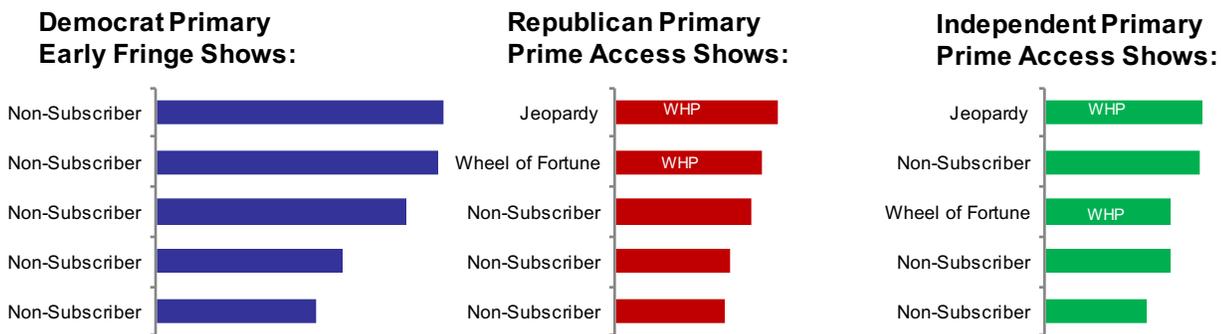
*Of the HH with Democrat Primary Election Voters Viewing Daytime, 67% view Broadcast, 7% view cable news nets, 26% view entertainment nets. Broadcast (ABC, CBS, NBC, FOX, CW, MyNet, ION); Cable News Nets (CNN, FXNC, HLN, MSNBC); Entertainment Nets are all other reported cable nets. Total displayed may not equal 100% due to rounding.

Source: comScore Local Feb '16 Erie 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 **Harrisburg** by Utilizing TV Dayparts throughout the day!

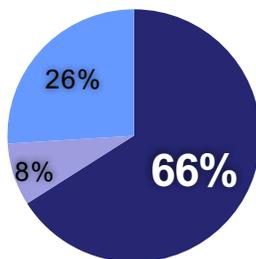
Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	125	114	82
Daytime	129	111	86
Early Fringe	134	115	100
Prime Access	132	117	118
Prime	127	115	109
Late Fringe	129	109	95

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

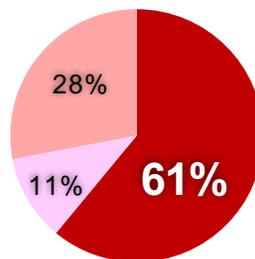


Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:

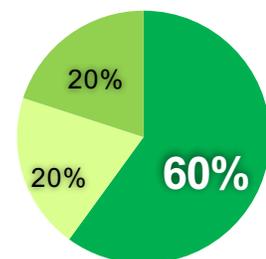
**Democrat Primary Election
Voter in Early Fringe*:**



**Republican Primary Election
Voter in Prime Access:**



**Independent Primary Election
Voter in Prime Access:**



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

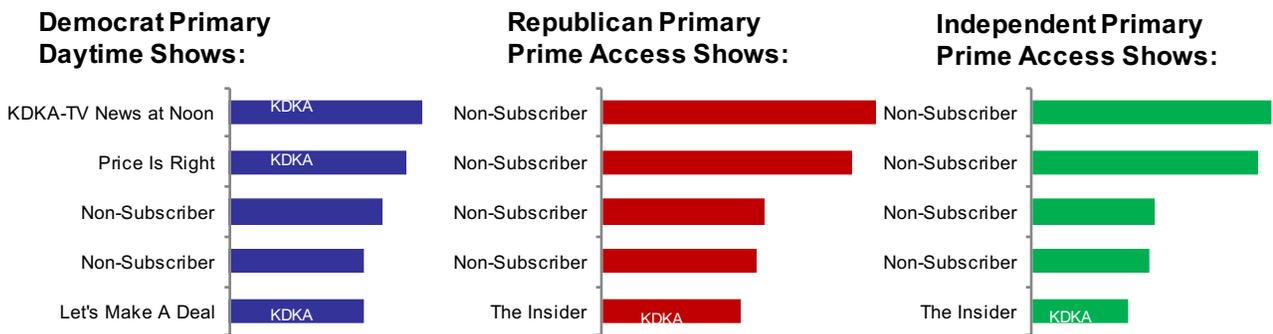
*Of the HH with Democrat Primary Election Voters Viewing Early Fringe, 66% view Broadcast, 8% view cable newsnets, 26% view entertainmentnets. Broadcast(ABC, CBS, NBC, FOX, CW); Cable News Nets (CNN, FXNC, HLN, MSNBC) EntertainmentNets are all other reported cable nets. Total displayed may not equal 100% due to rounding.

Source: comScore Local Feb'16 Harrisburg 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 **Pittsburgh** by Utilizing TV Dayparts throughout the day!

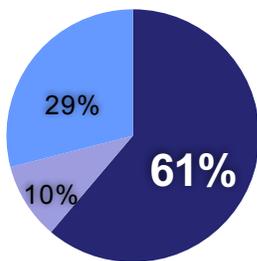
Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	122	103	84
Daytime	134	102	80
Early Fringe	132	108	80
Prime Access	131	111	89
Prime	125	107	85
Late Fringe	126	103	87

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

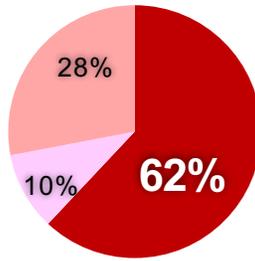


Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:

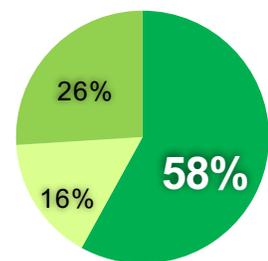
Democrat Primary Election Voter in Daytime*:



Republican Primary Election Voter in Prime Access:



Independent Primary Election Voter in Prime Access:



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

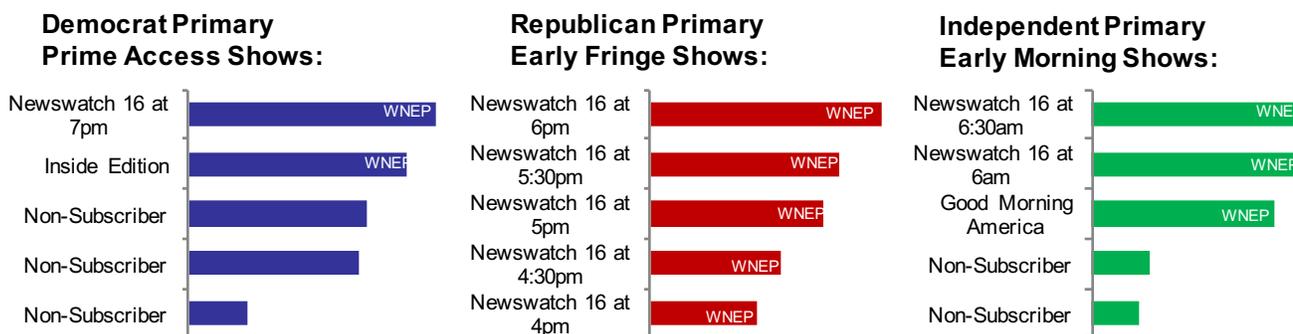
*Of the HH with Democrat Primary Election Voters Viewing Daytime, 61% view Broadcast, 29% view cablenews nets, 10% view entertainment nets. Broadcast (ABC, CBS, NBC, FOX, CW); Cable News Nets (CNN, FXNC, HLN, MSNBC) Entertainment Nets are all other reported cable nets. Total displayed may not equal 100% due to rounding.

Source: comScore Local Feb '16 Pittsburgh 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 **Wilkes Barre - Scranton** by Utilizing TV Dayparts throughout the day!

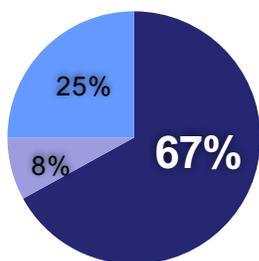
Time Period	Democrat Primary Election Index	Republican Primary Election Index	Independent Primary Election Index
Early Morning	120	108	124
Daytime	125	102	84
Early Fringe	127	110	86
Prime Access	129	110	106
Prime	122	109	88
Late Fringe	125	103	88

Top TV Programs to reach Wilkes Barre - Scranton's Primary Election Voters in their Strongest Daypart

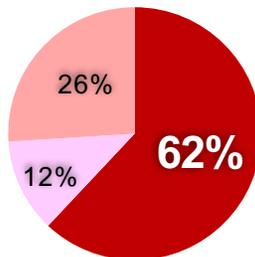


Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:

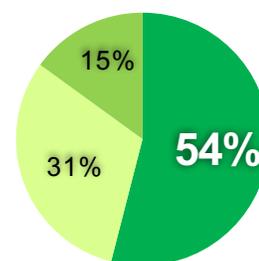
Democrat Primary Election Voter in Prime Access*



Republican Primary Election Voter in Early Fringe



Independent Primary Election Voter in Early Morning



■ 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, 67% view Broadcast, 8% view cable news nets, 25% view entertainment nets. Broadcast (ABC, CBS, NBC, FOX, CW, MyNet, ION); 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 Feb '16 Wilkes Barre - Scranton 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.

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