

BATTLEGROUND STATES IN FOCUS

COURTING THE INDEPENDENT VOTE

BATTLEGROUND FOR THE PRESIDENCY



ovember 8 is just around the corner. Although this is a national election, the reality is most of the country's attention will fall

on a few key states such as Ohio and Florida. These Battleground States (aka Swing States) will receive a large share of focus, as well as advertising dollars, since winning these states provides the best opportunity for Hillary Clinton and Donald Trump to pick up critical electoral votes.

The Local Vote 2016 continues to unearth important insights to help candidates and political strategists effectively use media to engage the local electorates. In this issue, we shine a spotlight on a vital voting segment within these crucial Battleground States – the Independent Vote, those who don't affiliate themselves with the Democratic or Republican Parties. Because the races are tight in many Swing States, **Battleground Independents will likely play a pivotal role in this election**.

MEDIA INSIGHTS BATTLEGROUND INDEPENDENTS

- Katz Media Group analyzed data from Independent voters across 7 key states: Ohio, Florida, Pennsylvania, North Carolina, Virginia, Wisconsin and Colorado.
- **One in four voters** in Battleground States are Independents, having no affiliation with the Democratic or Republican parties.
- Radio is the #1 reaching media platform among Battleground Independents. Radio is used by a larger percentage of Independents each week (94%) than Broadcast TV (88%), Cable TV (85%) or Mobile Internet (62%).
- Radio moves youth! Radio is the media platform used by the most **Millennial** and **Generation X** Independents in Battleground States, above all other media (94%, 97%).
- On a weekly basis, more Millennial Independents listen to Contemporary Hit Radio (54%) and Rock stations (52%) than watch major TV properties such as Broadcast Prime (45%), Local TV News (44%) and Cable News channels (26%).
- One in three Battleground Independents spend **more time listening to Radio** than watching Television. On average, these voters listen to over 2 hours of Radio daily, while watching less than 1 hour of TV.
- Battleground Independents engage with a diverse set of Radio formats, many of which are used more than national Cable News options. On a weekly basis, more Independents will listen to News/Talk/ Sports Radio stations (33%) and music formats such as Adult Contemporary (43%), Rock (40%) and Country (35%) than watch Cable News channels CNN (23%), Fox News (15%) or MSNBC (10%).



LOCAL RADIO INSIGHTS TARGETABILITY WITHIN BATTLEGROUND STATES

Political campaigns need to account for the unique listening habits of Independents within Battleground States. One size does not fit all! Independents tend to rally around a different set of Radio stations depending on the community they live in. The Katz Media Group analyzed Nielsen Voter Ratings data from 17 markets across 7 Battleground States.

OHIO - Adult/Classic Hits has the highest share of listening with Cleveland Independents; Adult Contemporary garners the highest share in Columbus; and News/Talk/Sports and Country are the strongest formats in Cincinnati.

FLORIDA - **Adult Contemporary** draws a consistently strong audience of Independents across the state, but is the decisive favorite in **Tampa** and **West Palm Beach**. In neighboring **Miami**, Independents engage most with **Spanish Language** Radio. In **Orlando** and **Jacksonville**, the **News/Talk/Sports** format performs well with Independents.

PENNSYLVANIA - Both the **Rock** and **News/Talk/Sports** formats have the largest share of listening among Independents in **Philadelphia**. While in the **Pittsburgh** market, **Country**, **Adult/Classic Hits** and **Rock** perform well with Independents.

ABOUT THE LOCAL VOTE 2016 INITIATIVE

Katz Radio Group 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, were 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



Overall, one in four voters in Battleground States don't affiliate themselves with either the Republican or Democratic Party. Candidates need to engage these Independents, as they can swing the election.



Source: The Local Vote 2016 from Katz Media Group. Analysis based 2,704 registered voters from the states of Colorado, Florida, North Carolina, Ohio, Pennsylvania, Virginia and Wisconsin. Interviews conducted by Nielsen from January 25 to April 5, 2016.



COURTING THE BATTLEGROUND INDEPENDENT RADIO IS YOUR POLITICAL POWER PLAYER



In Battleground States where every vote counts, Radio leads all other media in reaching the critical Independent Vote.



% MEDIA PLATFORM USAGE

One in three Independent voters spend more time with Radio than TV. On average, these voters listen over 2 hours a day, while watching for less than 1 hour.



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 from Katz Media Group. Analysis based 783 Independent voters from the states of Colorado, Florida, North Carolina, Ohio, Pennsylvania, Virginia and Wisconsin. Interviews conducted by Nielsen from January 25 to April 5, 2016.



BATTLEGROUND INDEPENDENTS THROUGH THE MEDIA LENS



Political campaigns have the opportunity to engage with Independents through a variety of radio formats, many of which are used more than national Cable News options.



Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. TV dayparts 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 from Katz Media Group. Analysis based 783 Independent voters from the states of Colorado, Florida, North Carolina, Ohio, Pennsylvania, Virginia and Wisconsin. Interviews conducted by Nielsen from January 25 to April 5, 2016.



BATTLEGROUND INDEPENDENTS BY GENERATION



Virtually every Independent voter listens to Radio in a given week. In fact, Radio is the #1 platform, used by more Millennial and Generation X Independents than any other media.



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 from Katz Media Group. Analysis based 783 Independent voters from the states of Colorado, Florida, North Carolina, Ohio, Pennsylvania, Virginia and Wisconsin. Adults 18-34 (251), Adults 35-49 (175), Adults 50-69 (283). Interviews conducted by Nielsen from January 25 to April 5, 2016.



MILLENNIAL INDEPENDENTS THROUGH THE MEDIA LENS



Millennials engage heavily with a diverse set of Radio formats. In fact, they are more likely to be found listening to their local Contemporary Hit and Rock Radio stations than watching Broadcast Prime, Local TV News and national Cable News.



Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. TV dayparts 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 from Katz Media Group. Analysis based on 251 Independent voters (A18-34) from the states of Colorado, Florida, North Carolina, Ohio, Pennsylvania, Virginia and Wisconsin. Interviews conducted by Nielsen from January 25 to April 5, 2016.



LOCAL RADIO = TARGETABILITY DELIVERING THE RIGHT MESSAGE TO THE RIGHT VOTER IN THE RIGHT MARKET





Share of Radio USING LOCAL RADIO TO Listening By Format TARGET INDEPENDENTS IN Adult Contemporary News/Talk/Sports OHIO Contemporary Hits Rock Country Adult/Classic Hits Political campaigns need to account for the unique listening Urban habits of Independents in markets across Ohio. Hispanic Other Adult/Classic Hits has the highest share of listening with Cleveland Independents; Adult Contemporary garners the highest share in Columbus; and News/Talk/Sports and Country are the strongest formats in Cincinnati. 50% 8 **CLEVELAND** 26% 26% COLUMBUS 20 14 CINCINNATI 18 Note: Not all Radio stations have reportable ratings in a market. 20 Nielsen non-subscribers excluded from analysis.

To be read: 26% of all Radio listening done by Columbus Independents is to Adult Contemporary stations. Source: Nielsen Political Ratings. Spring 2016, Independents 18+, AQH Share, M-F 6a-7p.





To be read: 36% of all Radio listening done by Tampa Independents is to Adult Contemporary followed by News/ Talk/Sports at 14%.



USING LOCAL RADIO TO TARGET INDEPENDENTS IN PENNSYLVANIA

Political campaigns need to account for the unique listening habits of Independents in markets across Pennsylvania.

Both the **Rock** and **News/Talk/Sports** formats have the largest share of listening among Independents in **Philadelphia**. Meanwhile in the **Pittsburgh** market, **Country**, **Adult/Classic Hits** and **Rock** perform well with Independents.

Share of Radio Listening By Format

- Adult Contemporary
 News/Talk/Sports
 Contemporary Hits
 Rock
 Country
 Adult/Classic Hits
 Urban
- HispanicOther
- Note: Not all Radio stations have reportable nitigs in a market. Nielsen non-subscribers ocluded from analysis.

To be read: 31% of all Radio listening done by Philadelphia Independents is to Rock stations followed by News/Talk/ Sports at 27%.



USING LOCAL RADIO TO TARGET INDEPENDENTS IN **N. CAROLINA**

Political campaigns need to account for the unique listening habits of Independents in markets across North Carolina.

While **Adult Contemporary** is the most listened to format among **Greensboro** Independents, **News/Talk/Sports** stations draw big audiences in **Raleigh** and **Charlotte**.



- Adult Contemporary
 News/Talk/Sports
 Contemporary Hits
 Rock
 Country
 Adult/Classic Hits
 - Urban
- HispanicOther



To be read: 23% of all Radio listening done by Greensboro Independents is to Country stations.



USING LOCAL RADIO TO TARGET INDEPENDENTS IN VIRGINIA

Political campaigns need to account for the unique listening habits of Independents in markets across Virginia.

News/Talk/Sports stations draw the biggest audiences among Independents in **Washington D.C.**, while **Urban** is heavily listened to in **Norfolk**.



Adult Contemporary
News/Talk/Sports
Contemporary Hits
Rock
Country
Adult/Classic Hits
Urban
Hispanic
Other



To be read: 45% of all Radio listening done by Washington D.C. Independents is to News/Talk/Sports. Source: Nielsen Political Ratings. Spring 2016, Independents 18+, AQH Share, M-F 6a-7p.



USING LOCAL RADIO TO TARGET INDEPENDENTS IN COLORADO & WISCONSIN

Share of Radio Listening By Format

Adult Contemporary
 News/Talk/Sports
 Contemporary Hits
 Rock
 Country
 Adult/Classic Hits
 Urban
 Hispanic
 Other





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