



THE LOCAL VOTE 2016

INDEPENDENTS IN FOCUS

ROAD TO THE
APRIL
CONTESTS



COURTING THE INDEPENDENT VOTE

March comes in like a lion and goes out like a lamb. Although we've all heard this adage, it in no way applies to the 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.**

MEDIA INSIGHTS BY PARTY LINE

- Across the 9 states that Katz Radio Group has studied to date, Radio is consistently the #1 reaching media platform with primary-goers regardless of their party affiliation: Democrats (94%), Republicans (94%) and **Independents** (95%).
- Among **Independents**, Radio is used by a larger percentage each week (95%) than Broadcast TV (88%) or Cable TV (86%).
- **Independents** engage with a diverse set of Radio formats, many of which are used more than national Cable News options. More **Independents** listen to News/Talk/Sports radio stations (41%) and music formats such as Adult Contemporary (38%), Rock (36%) and Country (32%) than watch Cable News channels CNN (25%), Fox News (19%) and MSNBC (12%).
- Democrats are far more likely to listen to a broad set of radio formats such as Adult Contemporary (39%), Contemporary Hits (36%), News/Talk/Sports (34%), Urban (29%), Classic Hits (29%) and Rock (26%) than watch news outlets like CNN (25%) and MSNBC (18%).
- More Republicans listen to Adult Contemporary (50%), News/Talk/Sports (46%) and Country (37%) radio stations than watch FOX News (34%) or CNN (19%) in a given week.

WISCONSIN INSIGHTS

- Nearly 4 out of 10 eligible Wisconsin 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.
- 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.
- Nearly every Opportunity Voter in Wisconsin listens to Radio (94%), a greater percentage than Broadcast TV (91%), Cable TV (83%) and Mobile Internet (58%).
- 7 out of 10 Opportunity Voters believe Radio advertising is a good way for political candidates to connect with them.

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.

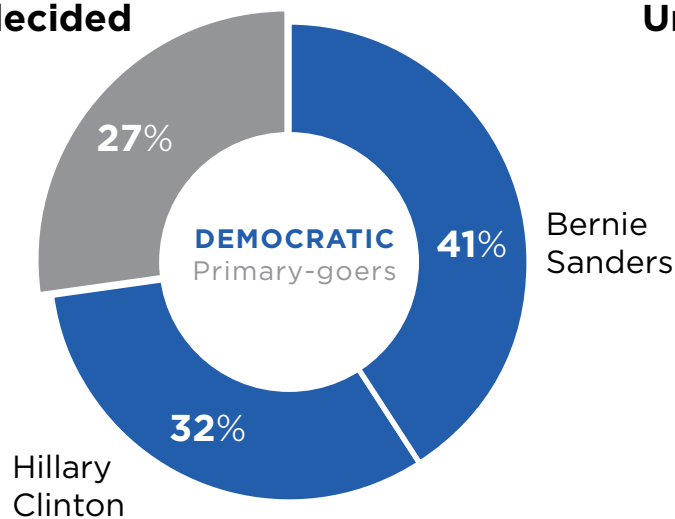
The results of this re-contact study, which are specific to voters’ opinions on the 2016 Presidential election, are tied back to the respondents’ Scarborough data including their demographic profile and media consumption. Wave 1 data represents 1,007 registered voters across the states of Colorado (251),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

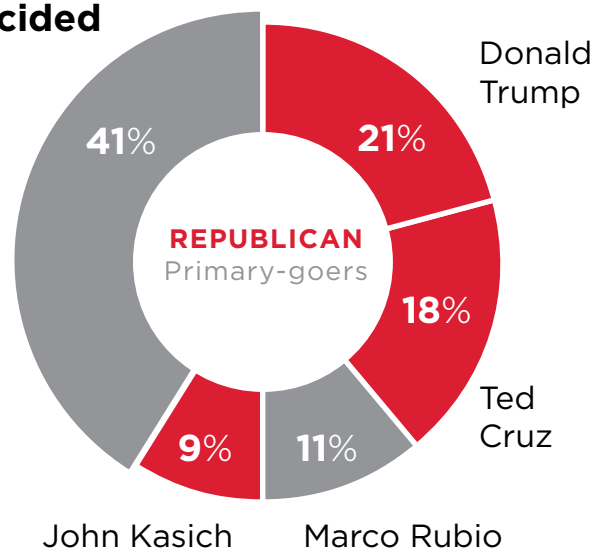


Both races are hotly contested in Wisconsin. While Bernie has a modest lead over Hillary, 27% of Democratic primary-goers are still undecided. Meanwhile, a whopping 41% of Republican primary-goers are undecided on whom they are voting for.

Undecided

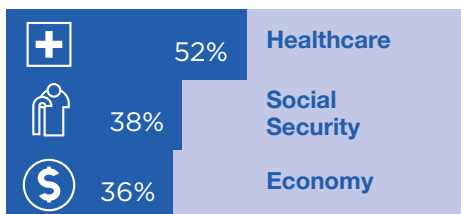


Undecided

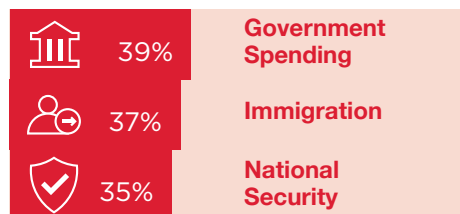


Wisconsin Democrats and Independents are keenly focused on Healthcare when picking a Presidential candidate, while Republicans tend to consider Government Spending, Immigration and National Security.

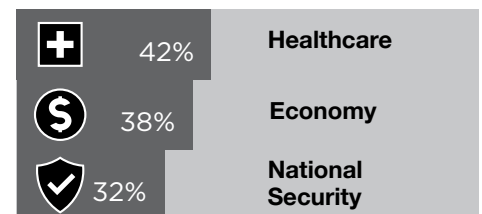
Registered Democrats



Registered Republicans



Independents



Q: What candidate do you plan to vote for in the upcoming primary election?

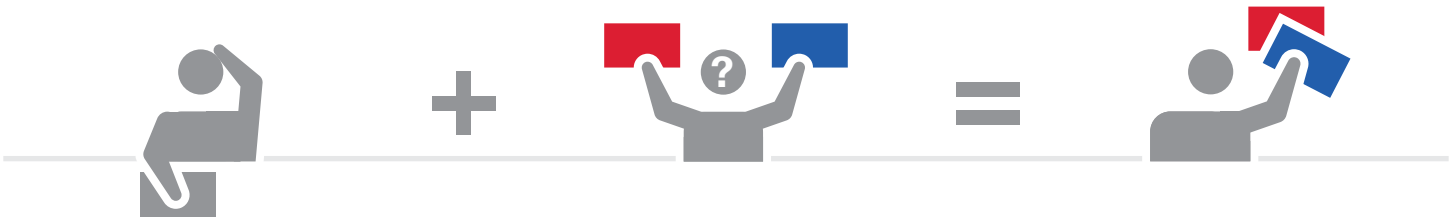
Q: Below is a list of issues facing our nation. Select the top 3 issues that would most influence who you vote for in the Presidential election.

Source: The Local Vote 2016. Katz Media Group/Nielsen study of 350 registered voters in Wisconsin. Interviews conducted March 7-10, 2016. Margins of error: +/- 8.2 percentage points for Democratic race and +/- 7.6 for Republican race.

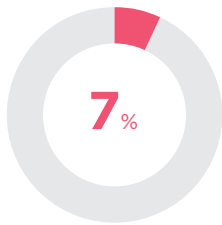
THE OPPORTUNITY VOTE



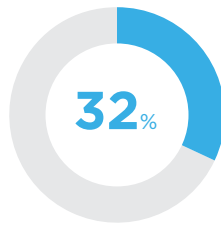
Getting Wisconsin voters to turn out and influencing those who are undecided are critical goals for political campaigns



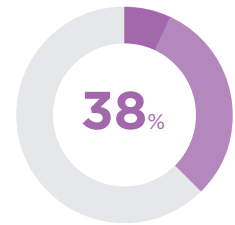
The **Turnout** Vote
Percentage of eligible voters who have yet to decide if they are voting in the primaries



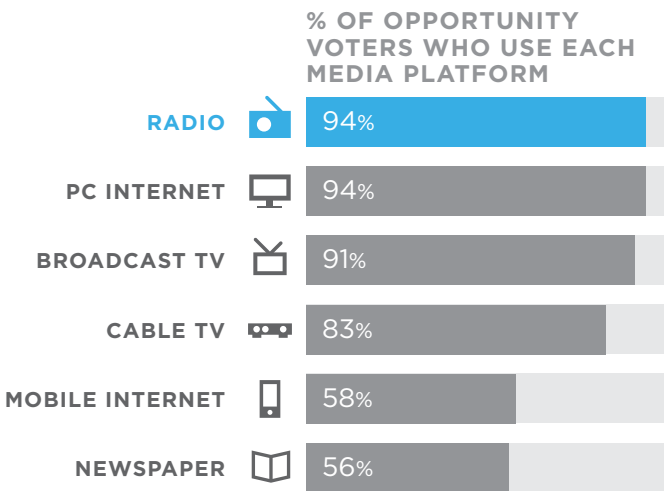
The **Undecided** Vote
Percentage of eligible voters who are attending the primaries, but are undecided on a candidate



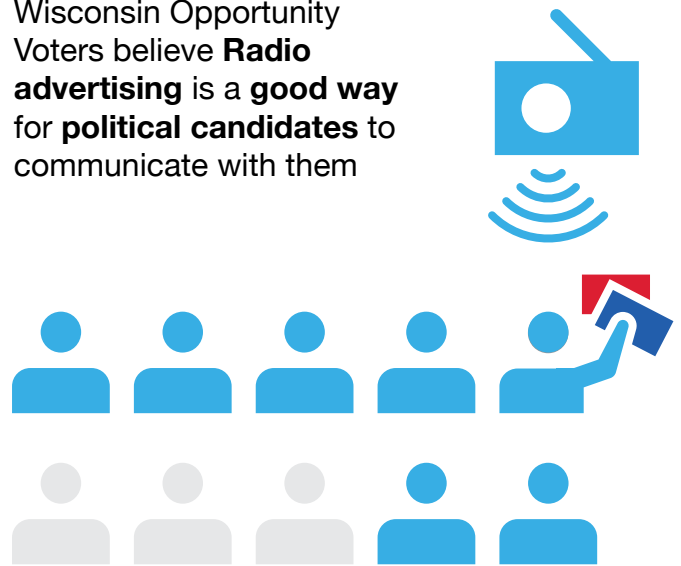
The **Opportunity** Vote
Percentage of eligible voters who are unsure if they are going to vote -or- do plan to vote, but are undecided on a candidate



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



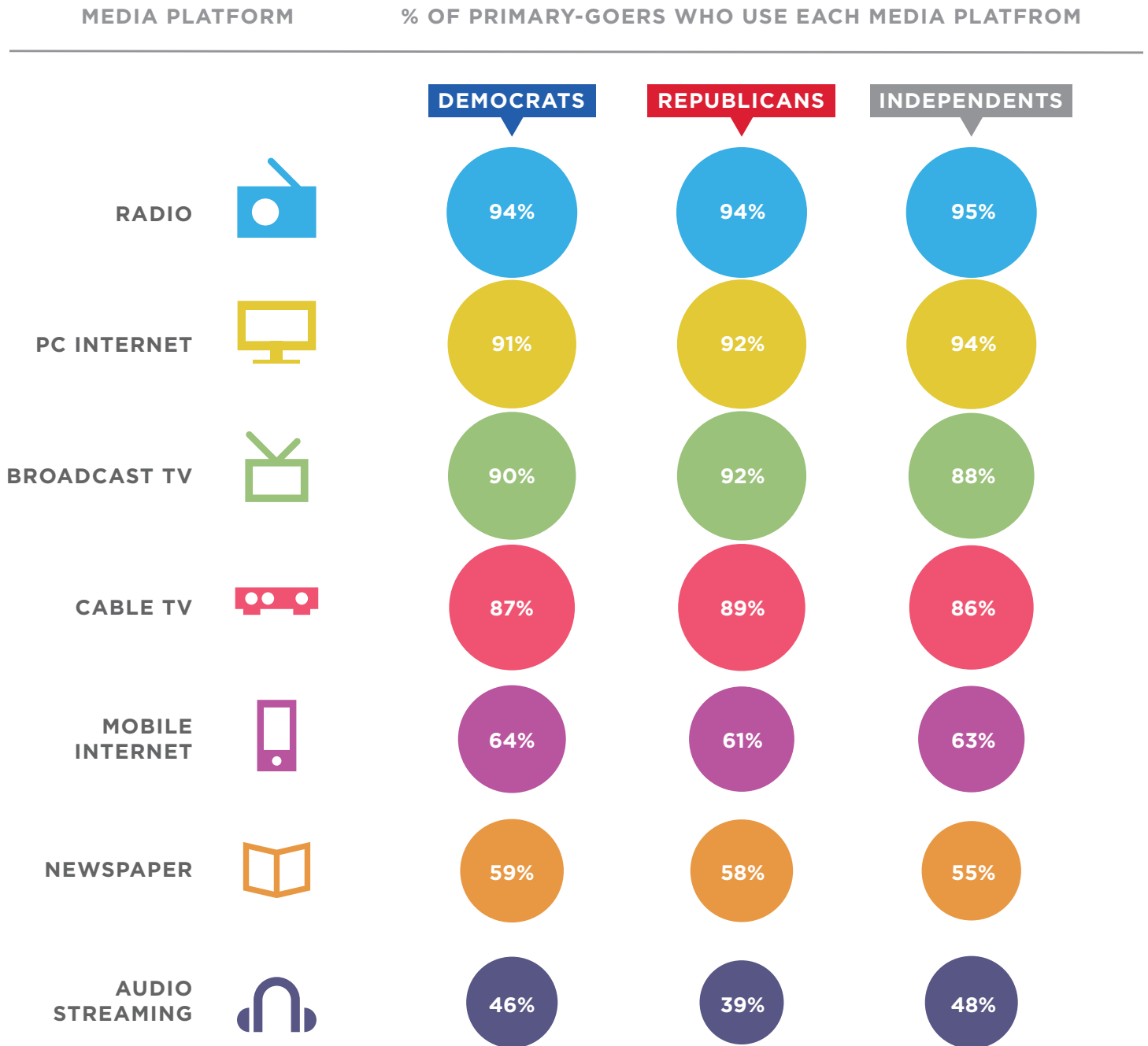
7 out of 10 Wisconsin Opportunity Voters believe **Radio advertising** is a **good way** for **political candidates** to communicate with them



Q: How much do you believe that radio ads are a good way for political candidates to get their message to people like yourself?
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

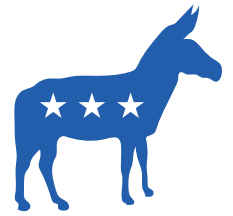
Mainstream Media – Where Candidates Engage the Electorate



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.

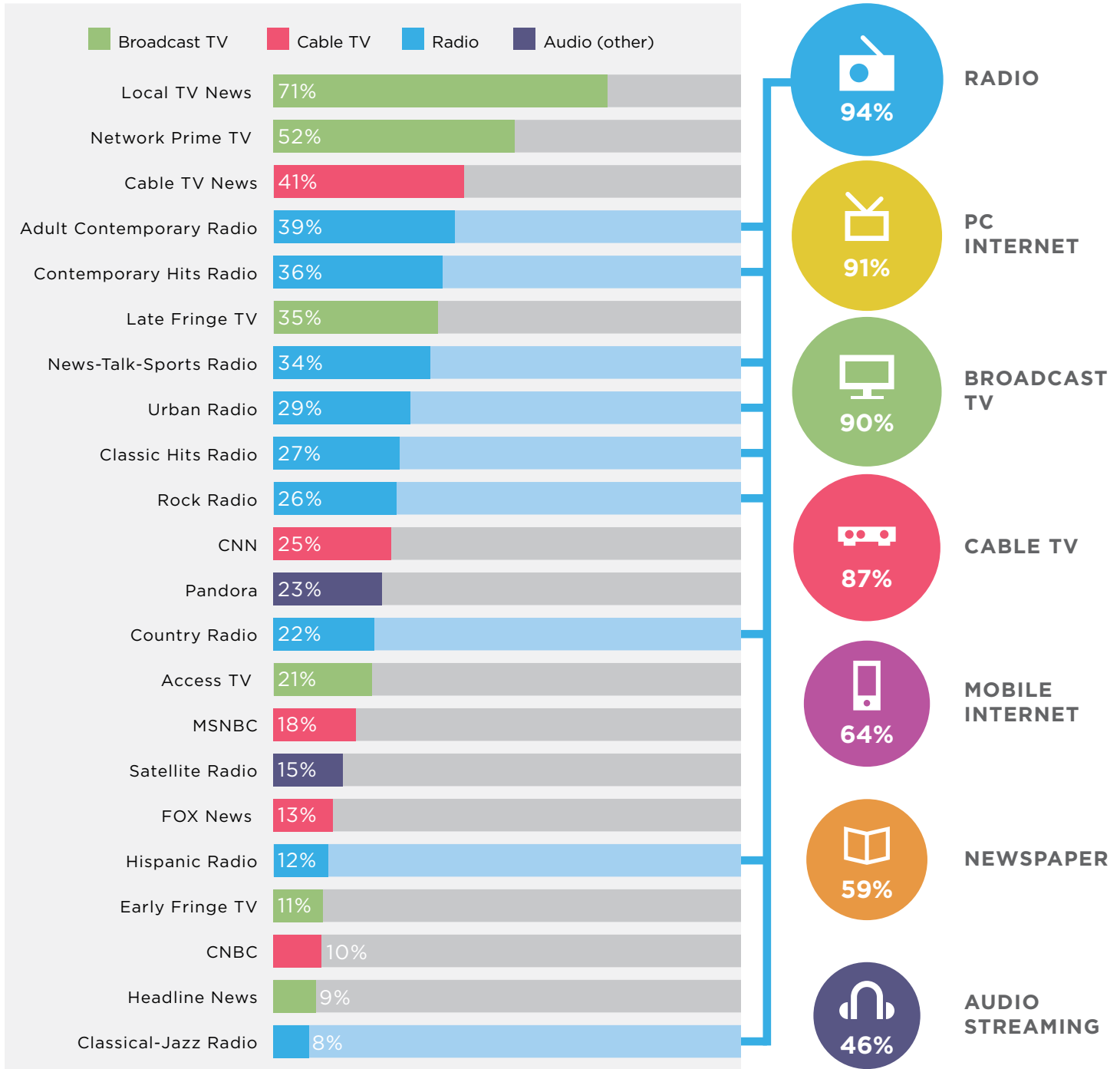
DEMOCRATS

THROUGH THE MEDIA LENS



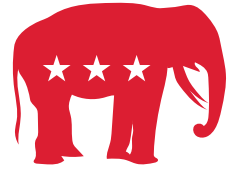
BEYOND NEWS Where to Talk to Democratic Primary-Goers

MEDIA PLATFORM



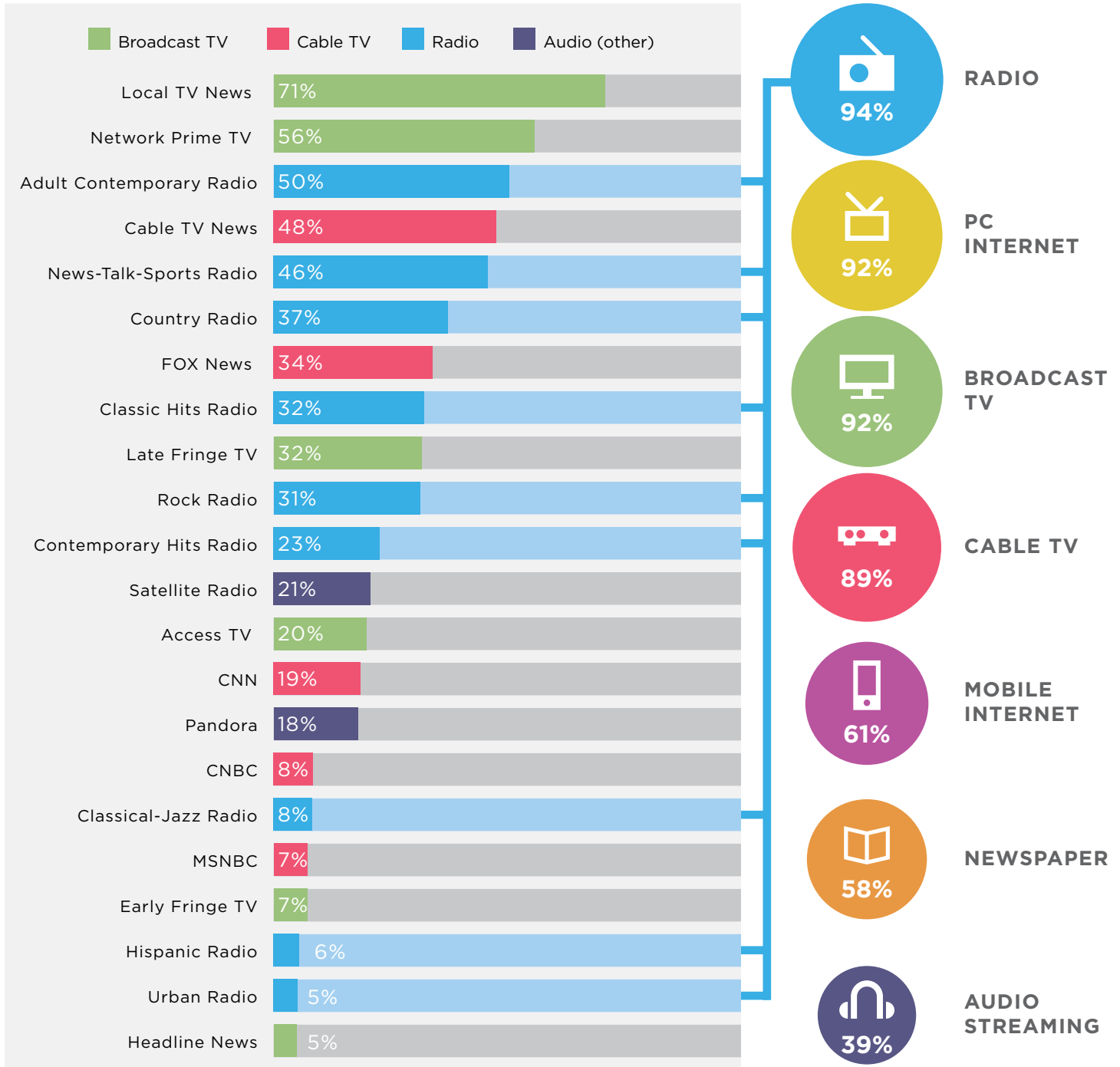
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. TV dayparts are based on 5-Net broadcast. Cable TV News includes CNN, MSNBC, FOX News, CNBC and Headline News. Audio Streaming = Local Radio, Pureplays and Music 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



BEYOND NEWS Where to Talk to Republican Primary-Goers

MEDIA PLATFORM



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

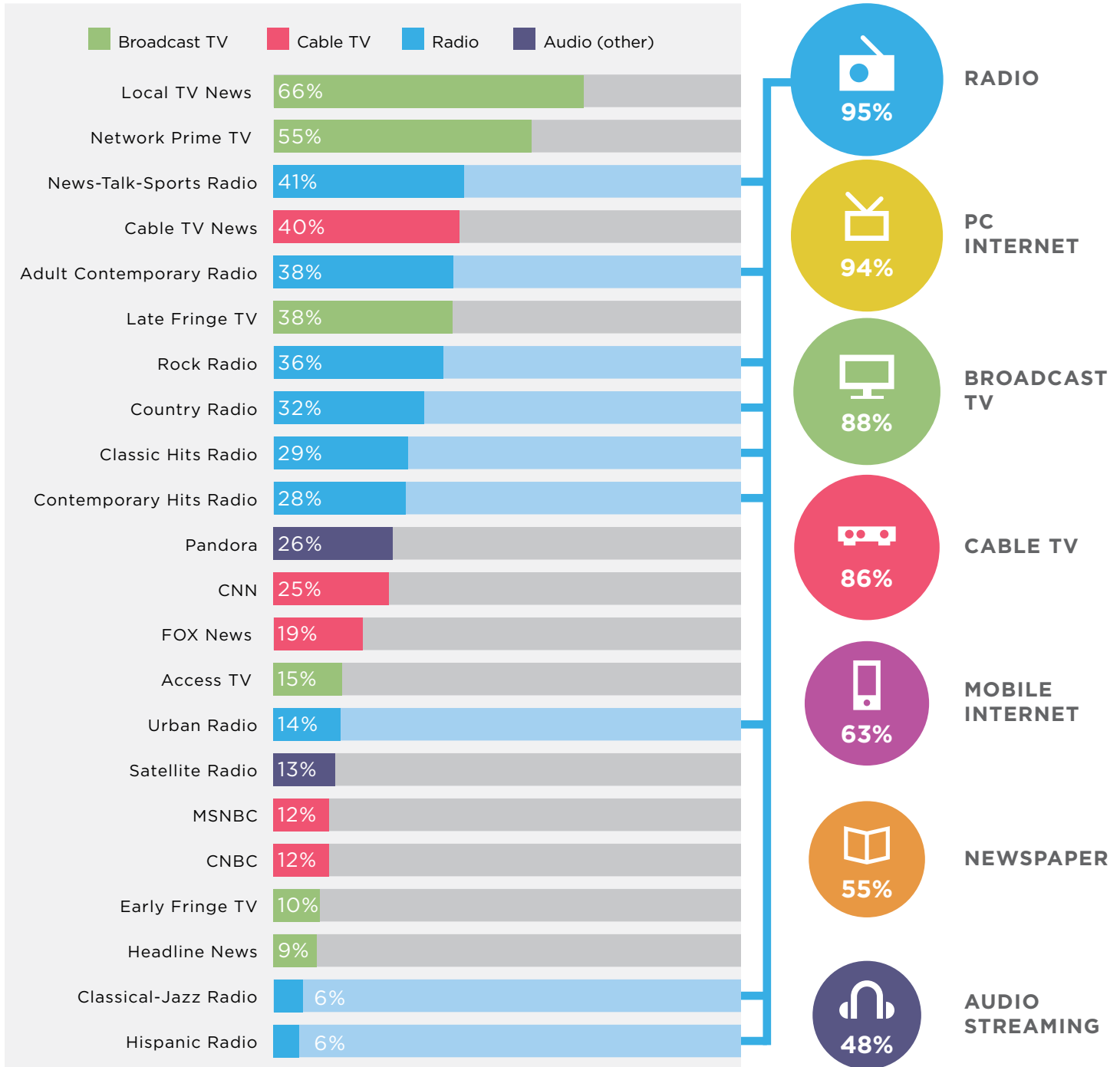
THROUGH THE MEDIA LENS



BEYOND NEWS

Where to Talk to Independent Primary-Goers

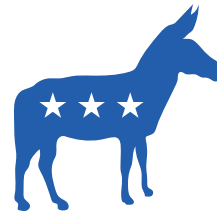
MEDIA PLATFORM



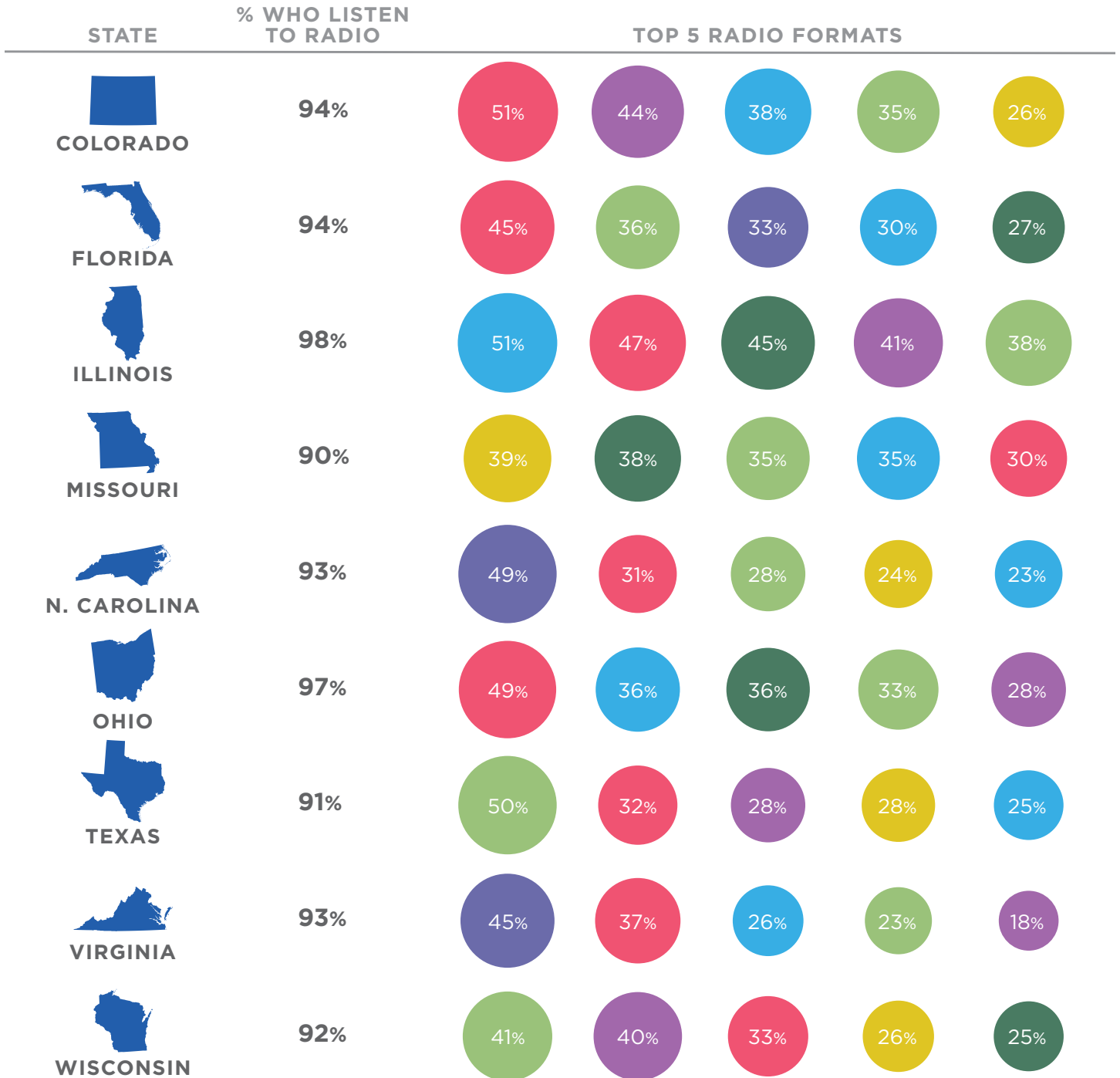
Note: Radio, TV and Newspaper percentages based on usage in average week. Internet and Audio Streaming percentages based on average month. TV dayparts are based on 5-Net broadcast. Cable TV News includes CNN, MSNBC, FOX News, CNBC and Headline News. Audio Streaming = Local Radio, Pureplays and Music 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.

RADIO FORMATS

DIVERSE GENRES
THAT APPEAL TO
DEMOCRATIC VOTERS



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

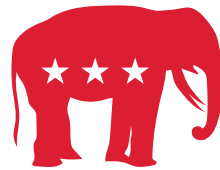


To be read: Statewide in North Carolina, 93% of registered Democrats listen to Radio. During the average week, 49% of registered Democrats listen to Urban stations and 31% listen to Adult Contemporary stations.

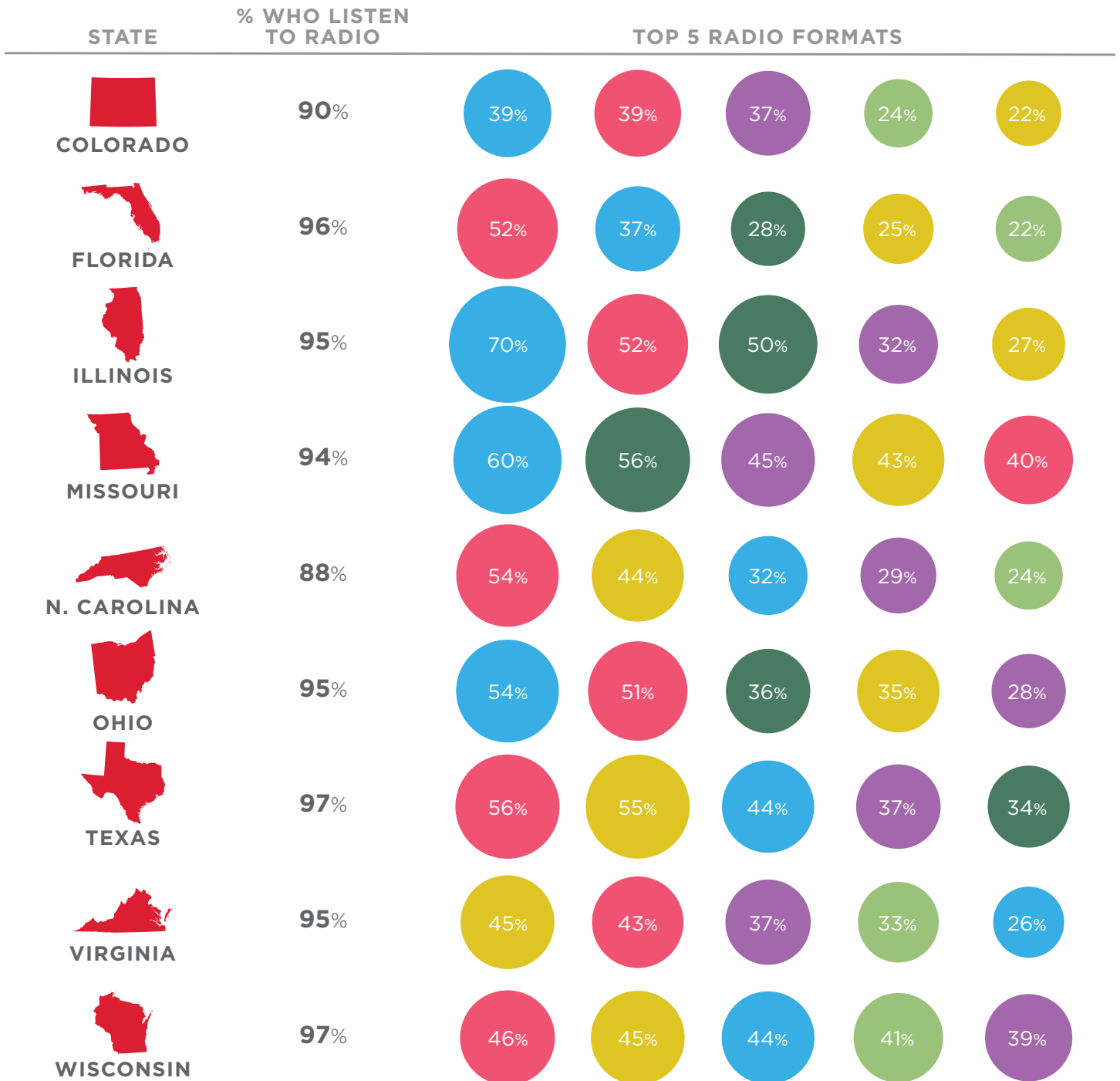
Source: The Local Vote 2016. Katz Media Group/Nielsen study of registered voters in the primary states of Texas, Colorado, Virginia, Florida, Illinois, Missouri, North Carolina, Ohio and Wisconsin. Analysis based on likely primary-goers who are registered Democrats (1,031). Interviews conducted January 25 to March 10, 2016.

RADIO FORMATS

DIVERSE GENRES
THAT APPEAL TO
REPUBLICAN VOTERS



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



To be read: Statewide in Florida, 96% of registered Republicans listen to Radio. During the average week, 52% of registered Republicans listen to Adult Contemporary stations and 37% listen to News-Talk-Sports stations.

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.

TARGETABILITY OF LOCAL RADIO

POLITICAL LEANING



DEMOCRAT



REPUBLICAN



INDEPENDENT

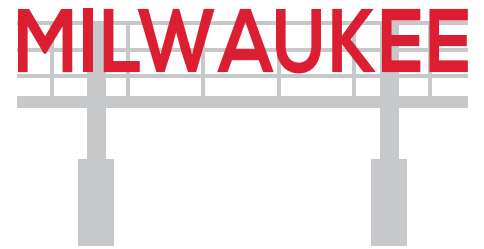
MILWAUKEE



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 that we see in Milwaukee. Multiple radio formats (not just News-Talk-Sports) offer a high density, political target audience for campaigns.

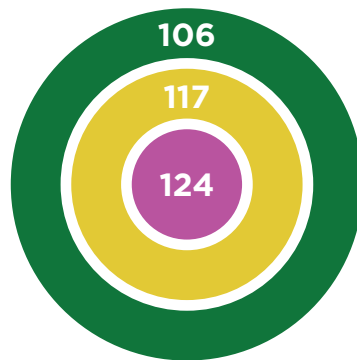
TARGETING VOTER SEGMENTS

DELIVERING THE RIGHT MESSAGE TO THE RIGHT VOTERS

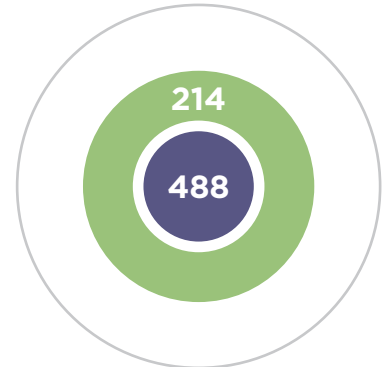


- Adult Contemporary
- News/Talk/Sports
- Contemporary Hits
- Rock
- Country
- Classic Hits
- Urban

RADIO FORMAT INDICES BY VOTER GROUP



SUPER DEMOCRATS

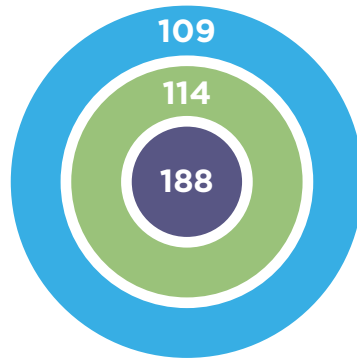


LEFT OUT DEMOCRATS

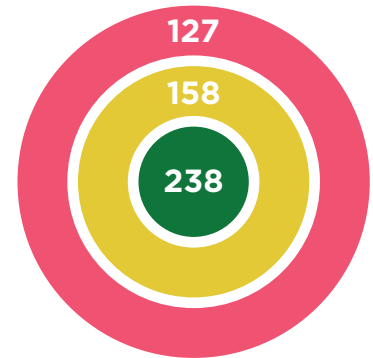
Milwaukee Radio stations appeal to voters from all political persuasions.

But one size does not fit all! Voters tend to rally around a unique set of Radio stations depending on their political leanings.

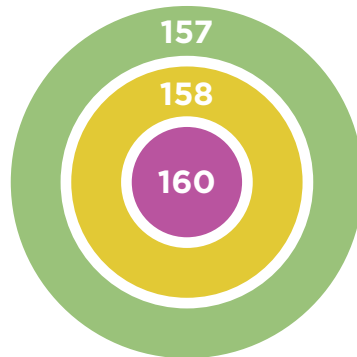
Local Radio offers a high density, targeted audience for any campaign.



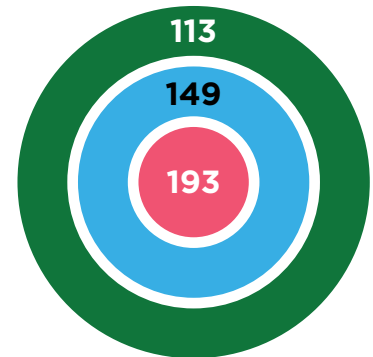
ON-THE-FENCE LIBERALS



GREEN TRADITIONALISTS



MILD REPUBLICANS



ULTRA CONSERVATIVES

To be read: Super Democrats are 24% more likely to be found listening to Rock Radio stations than the general population of Milwaukee, and 17% more likely to be found listening to Country stations.

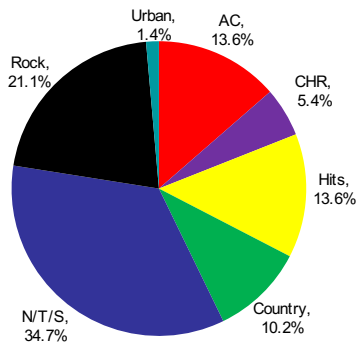
Source: Nielsen Political Ratings, Fall 2015. Adults 35+; AQH Ratings; M-F 6a-7p. Reported data are indices based on a 100 that compare average rating sizes of voter segments to A35+.

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



REPUBLICANS

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



News/Talk/Sports

1. WISN-A (News/Talk)
2. WTMJ-A (News/Talk)
3. WSSP-A (Sports)

Rock

1. WHQG-F (Mainstream Rock)
2. WKLH-F (Classic Rock)
3. WLUM-F (Alternative Rock)

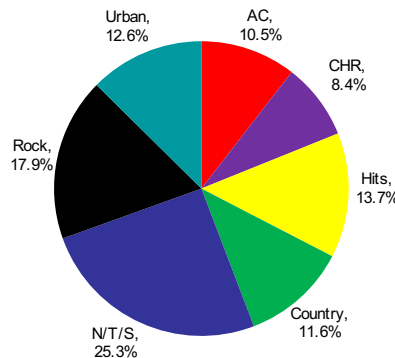
Adult Contemporary

1. WMYX-F (Hot AC)
2. WLDB-F (Hot AC)



DEMOCRATS

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



News/Talk/Sports

1. WTMJ-A (News/Talk)
2. WISN-A (News/Talk)
3. WSSP-A (Sports)

Rock

1. WKLH-F (Classic Rock)
2. WHQG-F (Mainstream Rock)
3. WLUM-F (Alternative Rock)

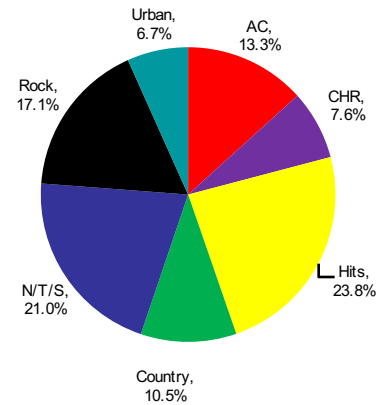
Hits/Oldies

1. WRIT-F (Classic Hits)
2. WZTI-A (Rhythmic Oldies)



INDEPENDENTS

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



Hits/Oldies

1. WRIT-F (Classic Hits)
2. WZTI-A (Rhythmic Oldies)

News/Talk/Sports

1. WISN-A (News/Talk)
2. WTMJ-A (News/Talk)
3. WGN-A (News/Talk)

Rock

- 1t. WLUM-F (Alternative Rock)
- 1t. WHQG-F (Mainstream Rock)
3. WKLH-F (Classic Rock)

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