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.

MEDIA INSIGHTS
BY KEY ISSUES

- Across the 10 states that Katz Radio 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.

- Radio is used by more primary-goers than any other media platform, regardless of what issues they deem important.

- Primary-goers that listen to News/Talk/Sports stations are more concerned about the issues of National Security (+9%), Immigration (+13%) and Government Spending (+10%) than the average primary-goer.

- Primary-goers that listen to Urban Radio stations are more likely to be influenced by the issues of Jobs and Race Relations when picking a Presidential candidate. (2 and 3 times more than the average primary-goer).

- Those who say the issue of The Economy impacts their vote have a higher propensity to listen to Rock (+8%), Contemporary Hits (+7%) and Hispanic Radio (+17%) formats than the average primary-goer.

- Those who say Healthcare impacts their vote are more likely to listen to Contemporary Hits (+10%), Classic Hits (+9%) and Urban (+26%) formats.
PENNSYLVANIA INSIGHTS

• 4 out of 10 eligible Pennsylvania 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.

• 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.

• Nearly every Opportunity Voter in Pennsylvania listens to Radio (95%), a greater percentage than Cable TV (89%) and Broadcast TV (86%).

• Opportunity Voters listen to Radio for 2 hours during the average day.

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. Wave 4 data represents 351 registered voters in Pennsylvania interviewed March 28 – April 5, 2016.
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.

Pennsylvania Democrats are keenly focused on Healthcare when picking a Presidential candidate, while Republicans are more likely to consider National Security.

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.

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.

Radio is listened to by a clear majority of Pennsylvania Opportunity Voters.

<table>
<thead>
<tr>
<th>Media Platform</th>
<th>Percentage of Opportunity Voters Using Each Platform</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>95%</td>
</tr>
<tr>
<td>PC Internet</td>
<td>93%</td>
</tr>
<tr>
<td>Cable TV</td>
<td>89%</td>
</tr>
<tr>
<td>Broadcast TV</td>
<td>86%</td>
</tr>
<tr>
<td>Newspaper</td>
<td>67%</td>
</tr>
<tr>
<td>Mobile Internet</td>
<td>54%</td>
</tr>
</tbody>
</table>

2 Hrs 5 Mins
Amount of time in the average day that Opportunity Voters listen to Radio.

<table>
<thead>
<tr>
<th>Issue</th>
<th>All Primary-Goers</th>
<th>Democrats</th>
<th>Republicans</th>
<th>independents</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Economy</td>
<td>38%</td>
<td>39%</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>37%</td>
<td>45%</td>
<td>28%</td>
<td>37%</td>
</tr>
<tr>
<td>National Security</td>
<td>35%</td>
<td>27%</td>
<td>46%</td>
<td>29%</td>
</tr>
<tr>
<td>Government Spending</td>
<td>26%</td>
<td>15%</td>
<td>37%</td>
<td>31%</td>
</tr>
<tr>
<td>Social Security</td>
<td>24%</td>
<td>32%</td>
<td>19%</td>
<td>8%</td>
</tr>
<tr>
<td>Immigration</td>
<td>23%</td>
<td>15%</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Gun Control / Rights</td>
<td>20%</td>
<td>21%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Jobs</td>
<td>20%</td>
<td>26%</td>
<td>12%</td>
<td>24%</td>
</tr>
<tr>
<td>Taxes</td>
<td>19%</td>
<td>20%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Foreign Policy</td>
<td>11%</td>
<td>9%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>The Government</td>
<td>11%</td>
<td>7%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Religious Freedom</td>
<td>8%</td>
<td>5%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>Race Relations</td>
<td>8%</td>
<td>12%</td>
<td>2%</td>
<td>10%</td>
</tr>
<tr>
<td>Climate Change</td>
<td>7%</td>
<td>11%</td>
<td>2%</td>
<td>8%</td>
</tr>
<tr>
<td>Women’s Rights</td>
<td>7%</td>
<td>12%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Abortion</td>
<td>6%</td>
<td>4%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Wall Street</td>
<td>4%</td>
<td>6%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Gay Marriage</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Energy Policy</td>
<td>3%</td>
<td>4%</td>
<td>1%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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.

RADIO = TARGETABILITY
USING FORMATS TO TARGET VOTERS BY THE ISSUES THEY CARE MOST ABOUT

<table>
<thead>
<tr>
<th>Issue</th>
<th>Adult Contemporary</th>
<th>News/Talk/Sports</th>
<th>Classic Hits</th>
<th>Rock</th>
<th>Contemporary Hits</th>
<th>Country</th>
<th>Urban</th>
<th>Hispanic</th>
<th>Classical/Jazz</th>
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<tbody>
<tr>
<td>The Economy</td>
<td>104</td>
<td>100</td>
<td>108</td>
<td>108</td>
<td>107</td>
<td>97</td>
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<td>Healthcare</td>
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<td>95</td>
<td>109</td>
<td>103</td>
<td>110</td>
<td>102</td>
<td>126</td>
<td>91</td>
<td>94</td>
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<tr>
<td>National Security</td>
<td>102</td>
<td>109</td>
<td>109</td>
<td>97</td>
<td>80</td>
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<td>72</td>
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<td>Gun Control/Rights</td>
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<td>93</td>
<td>95</td>
<td>105</td>
<td>93</td>
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<td>Jobs</td>
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<td>120</td>
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<td>108</td>
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<td>84</td>
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<tr>
<td>Foreign Policy</td>
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<td>122</td>
<td>66</td>
<td>100</td>
<td>47</td>
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<td>The Government</td>
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<td>114</td>
<td>82</td>
<td>100</td>
<td>98</td>
<td>121</td>
<td>90</td>
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<tr>
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<td>115</td>
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<td>Climate Change</td>
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<td>120</td>
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<td>44</td>
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<tr>
<td>Gay Marriage</td>
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<td>97</td>
<td>101</td>
<td>101</td>
<td>96</td>
<td>135</td>
<td>54</td>
<td>65</td>
</tr>
<tr>
<td>Energy Policy</td>
<td>91</td>
<td>115</td>
<td>120</td>
<td>116</td>
<td>95</td>
<td>112</td>
<td>92</td>
<td>69</td>
<td>176</td>
</tr>
</tbody>
</table>

To be read: Primary-goers who say National Security impacts their candidate choice are 9% more likely to listen to News/Talk/Sports stations than the typical primary-goer. Primary-goers who say National Security impacts their candidate choice and listen to News/Talk/Sports stations 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.
38% of Primary-goers say The Economy is an issue that will impact their choice for President.

43% Democratic

21% Independent

37% Republican

WHO THEY ARE VOTING FOR

23% HILLARY
14% BERNIE
16% TRUMP
7% CRUZ
5% KASICH
35% UNDECIDED

HOW THEY SKEW DEMOGRAPHICALLY

More Important

Less Important

WHAT MEDIA PLATFORMS THEY USE

RADIO
94%

PC INTERNET
93%

BROADCAST TV
90%

CABLE TV
88%

MOBILE INTERNET
63%

NEWSPAPER
58%

AUDIO STREAMING
42%

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.

IN THE INTEREST OF HEALTHCARE

37% of Primary-goers say Healthcare is an issue that will impact their choice for President.

WHAT PARTY THEY BELONG TO

50% DEMOCRATIC
22% INDEPENDENT
28% REPUBLICAN

WHO THEY ARE VOTING FOR

26% HILLARY
17% BERNIE
10% TRUMP
6% CRUZ
3% KASICH
38% UNDECIDED

HOW THEY SKEW DEMOGRAPHICALLY

More Important  Less Important

44% WOMEN
44% BLACK
40% HHI < $75K
37% AGE 35+
36% AGE 18-34
36% HISPANIC
35% WHITE
33% HHI $75K+
30% MEN

WHAT MEDIA PLATFORMS THEY USE

95% RADIO
91% BROADCAST TV
91% PC INTERNET
88% CABLE TV
62% MOBILE INTERNET
60% NEWSPAPER
44% AUDIO STREAMING

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.

35% of Primary-goers say National Security is an issue that will impact their choice for President.

WHAT PARTY THEY BELONG TO
- 33% Democratic
- 18% Independent
- 50% Republican

WHO THEY ARE VOTING FOR
- 18% Hillary
- 7% Bernie
- 20% Trump
- 11% Cruz
- 5% Kasich
- 38% Undecided

HOW THEY SKEW DEMOGRAPHICALLY

What media platforms they use:
- Radio: 94%
- Broadcast TV: 92%
- PC Internet: 92%
- Cable TV: 90%
- Newspaper: 61%
- Mobile Internet: 60%
- Audio Streaming: 39%

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.

23% of Primary-goers say **Immigration** is an issue that will impact their choice for President.

**WHAT PARTY THEY BELONG TO**
- 27% Democratic
- 22% Independent
- 51% Republican

**WHO THEY ARE VOTING FOR**
- 13% Hillary
- 8% Bernie
- 31% Trump
- 10% Cruz
- 4% Kasich
- 34% Undecided

**HOW THEY SKEW DEMOGRAPHICALLY**

<table>
<thead>
<tr>
<th>More Important</th>
<th>Less Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>29% Hispanic</td>
<td>6% Black</td>
</tr>
<tr>
<td>25% White</td>
<td></td>
</tr>
<tr>
<td>25% Men</td>
<td></td>
</tr>
<tr>
<td>24% Age 35+</td>
<td></td>
</tr>
<tr>
<td>23% HHI $75K+</td>
<td></td>
</tr>
<tr>
<td>23% HHI &lt; $75K</td>
<td></td>
</tr>
<tr>
<td>21% Women</td>
<td></td>
</tr>
<tr>
<td>19% Age 18-34</td>
<td></td>
</tr>
</tbody>
</table>

**WHAT MEDIA PLATFORMS THEY USE**
- 93% Radio
- 93% Broadcast TV
- 90% PC Internet
- 88% Cable TV
- 59% Mobile Internet
- 58% Newspaper
- 40% Audio Streaming

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.

IN THE INTEREST OF GUN CONTROL/RIGHTS

20% of Primary-goers say Gun Control/Rights is an issue that will impact their choice for President.

WHAT PARTY THEY BELONG TO

- 43% DEMOCRATIC
- 23% INDEPENDENT
- 35% REPUBLICAN

WHO THEY ARE VOTING FOR

- 29% HILLARY
- 12% BERNIE
- 20% TRUMP
- 9% CRUZ
- 2% KASICH
- 28% UNDECIDED

HOW THEY SKEW DEMOGRAPHICALLY

- MEN
- HISPANIC
- BLACK
- AGE 35+
- WHITE
- HHI < $75K
- HHI $75K+
- WOMEN
- AGE 18-34

WHAT MEDIA PLATFORMS THEY USE

- RADIO 94%
- PC INTERNET 92%
- BROADCAST TV 89%
- CABLE TV 84%
- MOBILE INTERNET 62%
- NEWSPAPER 56%
- AUDIO STREAMING 43%

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.

When it comes to targeting voters, local broadcast has powerful new tools to segment your audience and deliver MASSively. Here are snapshots of differences that we see in Philadelphia and Pittsburgh. Multiple radio formats offer a high density, political target audience for campaigns.
Finding the Perfect Radio Formats to Reach Republican, Democrat and Independent Voters in Philadelphia

**REPUBLICANS**

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

<table>
<thead>
<tr>
<th>Format</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>News/Talk/Sports</td>
<td>1. WIP-F (Sports)</td>
</tr>
<tr>
<td>News/Talk/Sports</td>
<td>2. KYW-A (News)</td>
</tr>
<tr>
<td>News/Talk/Sports</td>
<td>3. WPEN-F (Sports)</td>
</tr>
<tr>
<td>Rock</td>
<td>1. WMMR-F (Album Or. Rock)</td>
</tr>
<tr>
<td>Rock</td>
<td>2. WMGK-F (Classic Rock)</td>
</tr>
<tr>
<td>Hits</td>
<td>1. WOGL-F (Classic Hits)</td>
</tr>
</tbody>
</table>

**DEMOCRATS**

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

<table>
<thead>
<tr>
<th>Format</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>News/Talk/Sports</td>
<td>1. KDAS-F (Urban AC)</td>
</tr>
<tr>
<td>News/Talk/Sports</td>
<td>2. WRNB-F (Urban Oldies)</td>
</tr>
<tr>
<td>News/Talk/Sports</td>
<td>3. WPPZ-F (Urban Inspirational)</td>
</tr>
<tr>
<td>Rock</td>
<td>1. WMGK-F (Classic Rock)</td>
</tr>
<tr>
<td>Rock</td>
<td>2. WMMR-F (Album Or. Rock)</td>
</tr>
<tr>
<td>Hits</td>
<td>1. WOGL-F (Classic Hits)</td>
</tr>
</tbody>
</table>

**INDEPENDENTS**

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

<table>
<thead>
<tr>
<th>Format</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>News/Talk/Sports</td>
<td>1. KYW-A (News)</td>
</tr>
<tr>
<td>News/Talk/Sports</td>
<td>2. WIP-F (Sports)</td>
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<tr>
<td>News/Talk/Sports</td>
<td>3. WPEN-F (Sports)</td>
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<tr>
<td>Rock</td>
<td>1. WMGK-F (Classic Rock)</td>
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<tr>
<td>Rock</td>
<td>2. WMMR-F (Album Or. Rock)</td>
</tr>
<tr>
<td>Hits</td>
<td>1. WOGL-F (Classic Hits)</td>
</tr>
</tbody>
</table>

**Source:** Nielsen Political Ratings FA15, Adults 35+, AQH Ratings Rank and AQH Share, M-F 6a-7p, Nielsen Non-Subscribers excluded
Finding the Perfect Radio Formats to Reach Republican, Democrat and Independent Voters in Pittsburgh

**REPUBLICANS**

Top 3 Format Preferences for Republicans are N/T/S, Rock and Hits

- **News/Talk/Sports**
  1. KDKA-A (News Talk)
  2. KDKA-F (Sports)
  3. WBGG-A (Sports)

- **Rock**
  1. WDVE-F (AOR)
  2. WXDX-F (Alternative)
  3. -

- **Hits**
  1. WWSW-F (Classic Hits)
  2. WRRK-F (Adult Hits)
  3. -

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

**DEMOCRATS**

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

- **News/Talk/Sports**
  1. KDKA-A (News Talk)
  2. KDKA-F (Sports)
  3. -

- **Hits**
  1. WWSW-F (Classic Hits)
  2. WRRK-F (Adult Hits)
  3. -

- **Rock**
  1. WDVE-F (AOR)
  2. WXDX-F (Alternative)
  3. -

**INDEPENDENTS**

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

- **News/Talk/Sports**
  1. KDKA-A (News Talk)
  2. KDKA-F (Sports)
  3. -

- ** Hits**
  1. WWSW-F (Classic Hits)
  2. WRRK-F (Adult Hits)
  3. -

- **Rock**
  1. WDVE-F (AOR)
  2. WXDX-F (Alternative)
  3. -

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