



THE LOCAL VOTE 2016

# THE LOCAL VOTE 2016

THE ROAD TO  
SUPER  
TUESDAY



## COURTING “THE OPPORTUNITY VOTE”

**S**uccess on the national political stage is built from a capacity to understand and address the interests of local constituencies. Katz Radio 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 Radio 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.
- Radio leads all other media in reaching the critical “Opportunity Vote” (93.2% Reach), followed by Broadcast Television (89.9%), Cable TV (89.8%), the Internet via computer (87.8%), and Mobile Internet (64.4%).
- One out of three “Opportunity Voters” spend more time listening to Radio than watching Television. On average, these voters listen to nearly 2 hours of Radio daily (1:52), while watching less than 1 hour of TV (:52).
- Opportunity Voters are 5X more likely to agree that Radio is an appropriate place for political advertising than Pandora (32% agreement v 7%).
- Multiple Radio formats (not just News/Talk/Sports) offer a high density, political target audience for campaigns.

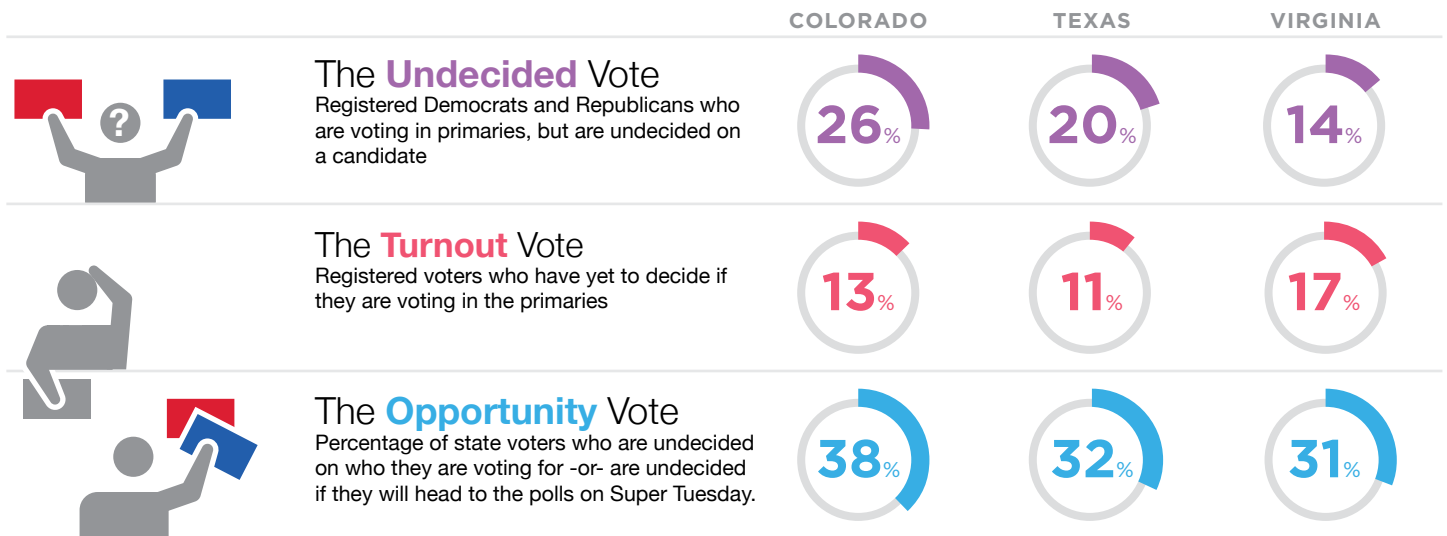
### ABOUT THE LOCAL VOTE 2016 INITIATIVE

**K**atz Radio 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.

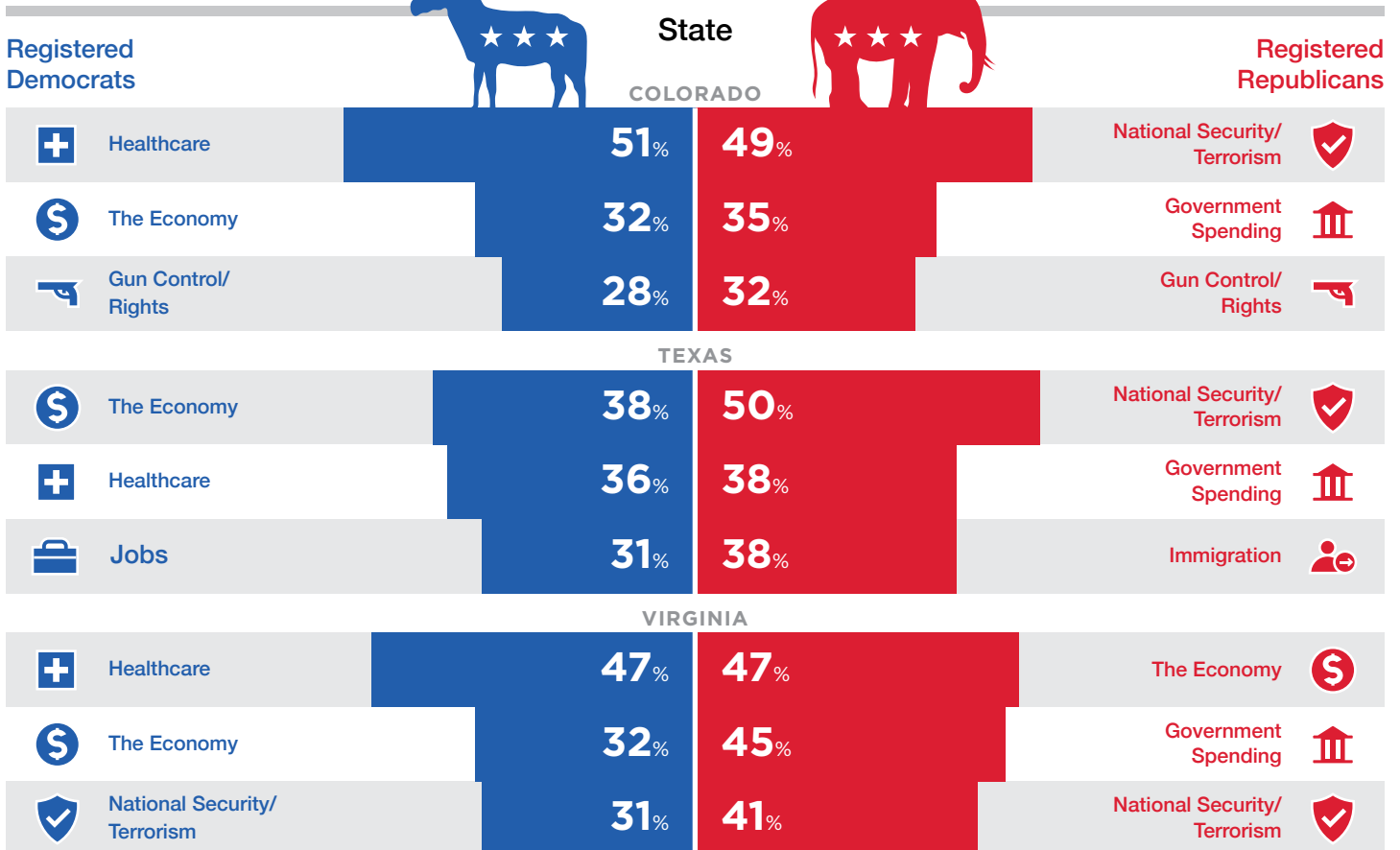
Katz Radio Group will be reporting on this initiative throughout the 2016 Presidential primary season.

# PULSE OF THE ELECTORATE

## THE OPPORTUNITY VOTE



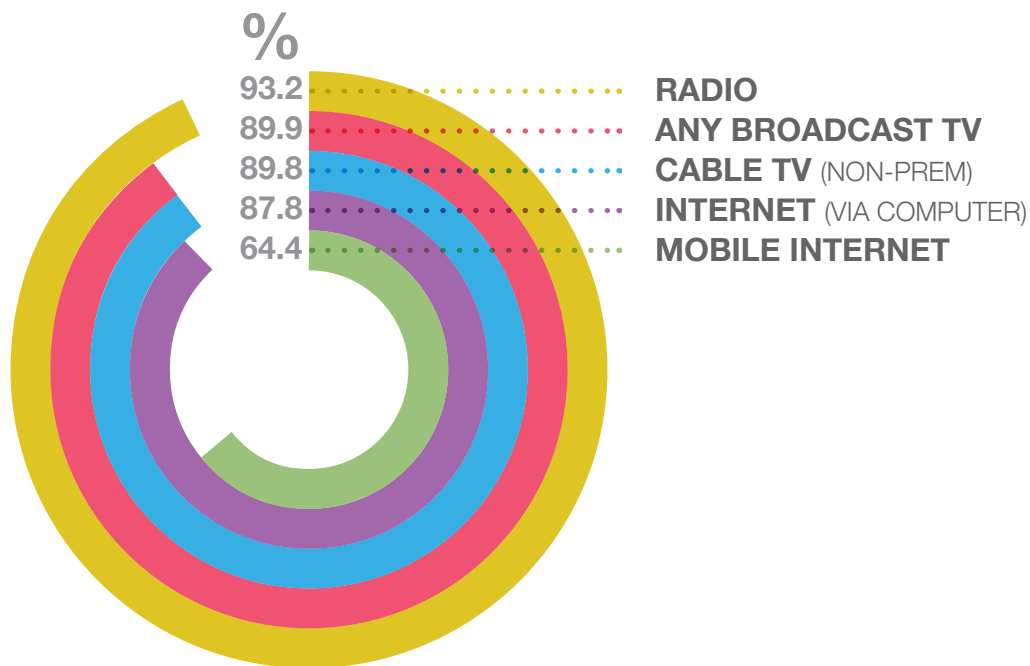
## ISSUES BY STATE & PARTY LINES



# RADIO

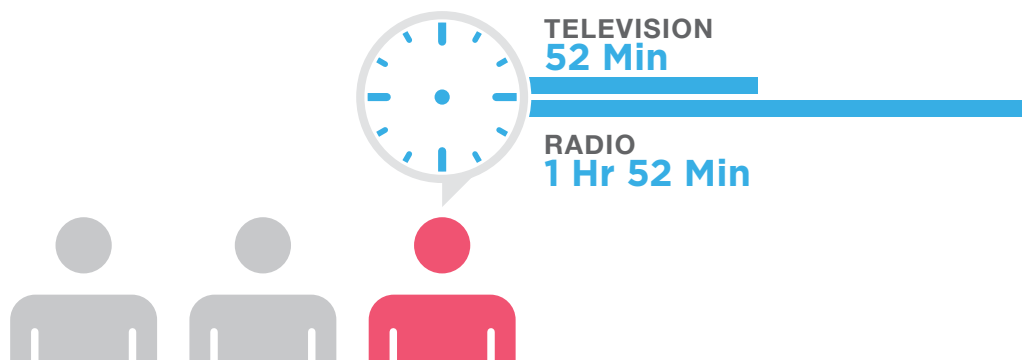
## IS YOUR POLITICAL POWER PLAYER

Radio leads all other media in reaching the critical “Opportunity Vote”, followed by Broadcast Television, Cable TV, the Internet via computer, and Mobile Internet.

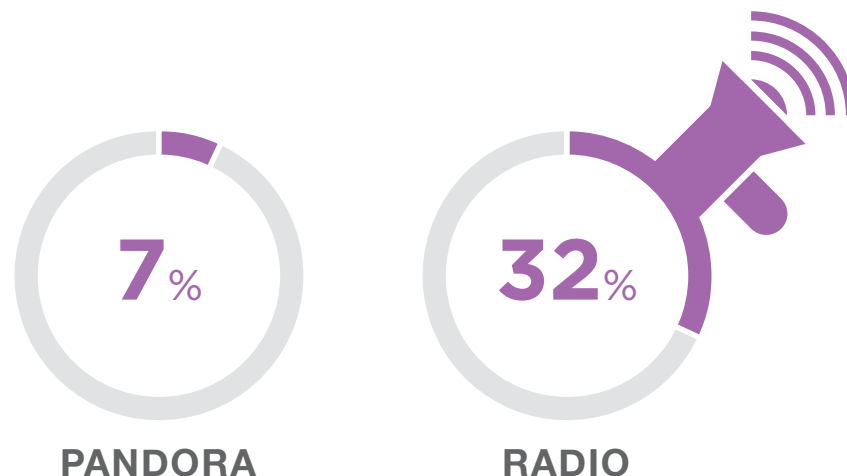


One out of three “Opportunity Voters” spend more time listening to Radio than watching Television.

On average, these voters listen to nearly 2 hours of Radio daily, while watching less than 1 hour of TV.

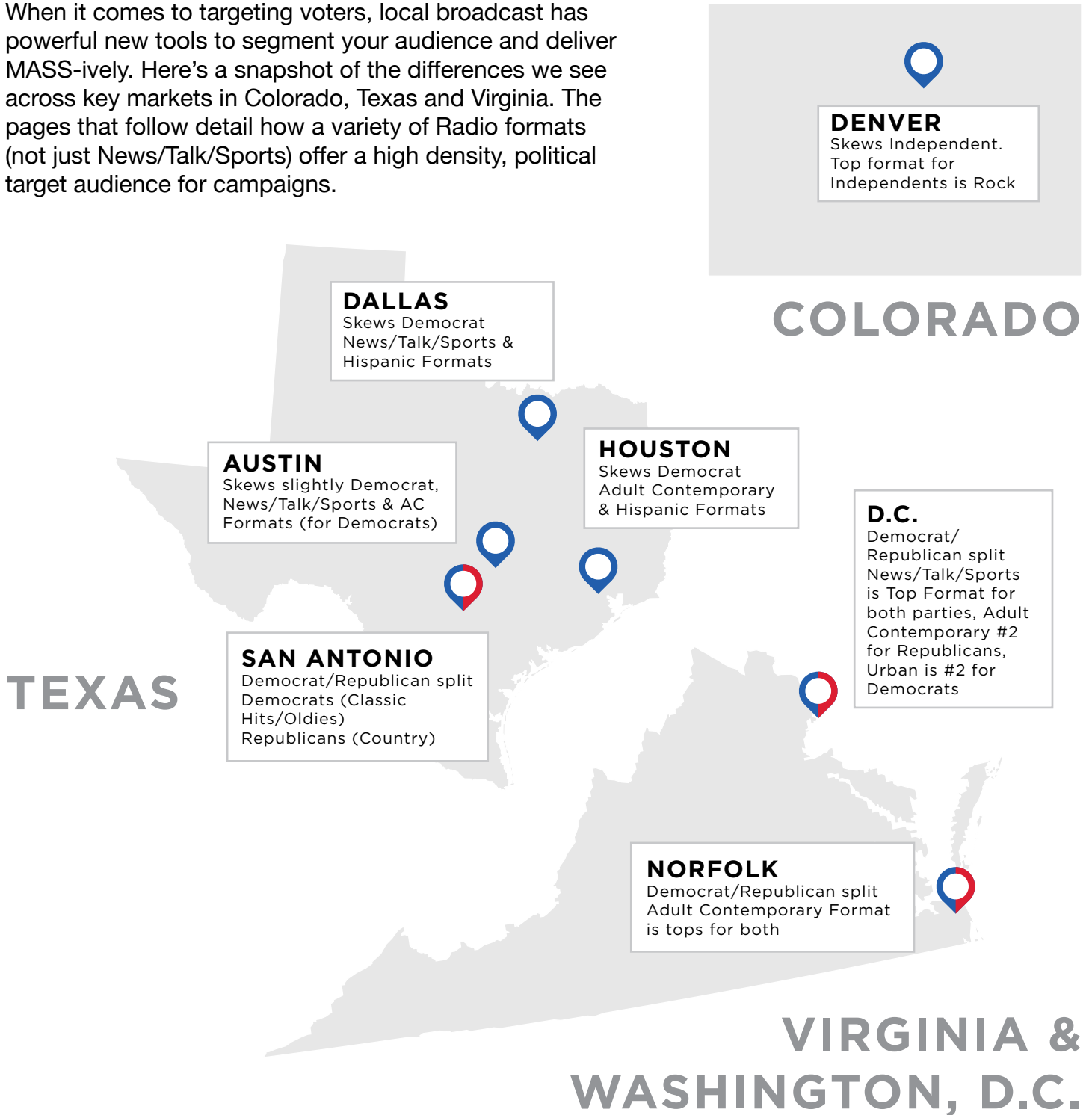


Opportunity Voters are 5X more likely to agree that Radio is an appropriate place for political advertising than Pandora.



# IN FOCUS: TARGETABILITY OF LOCAL RADIO

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 Radio formats (not just News/Talk/Sports) offer a high density, political target audience for campaigns.



# COLORADO

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DENVER

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



## REPUBLICANS

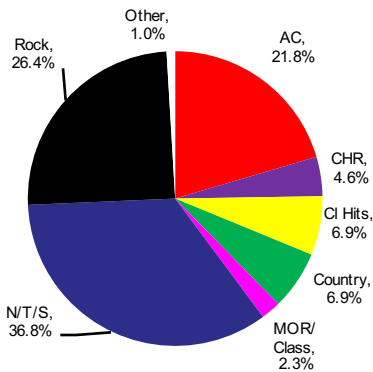


## DEMOCRATS



## INDEPENDENTS

**Top 3 Format Preferences for Republicans are News/Talk, Rock and AC**



### News/Talk/Sports

1. KOA-A (News/Talk)
2. KKFN-F (Sports)
3. KHOW-A (Talk)

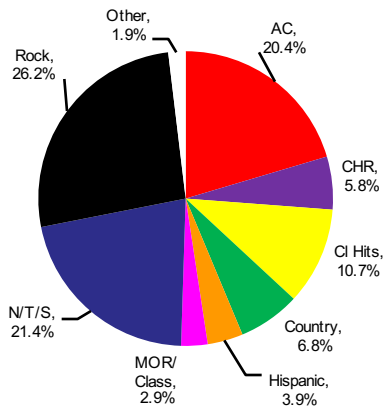
### Rock

1. KQMT-F (Classic Rock)
2. KBCO-F (Adult Alternative)
3. KRFX-F (Classic Rock)

### Adult Contemporary

- 1t. KALC-F (Modern AC)
- 1t. KIMN-F (Hot AC)
3. KOSI-F (Adult Contemporary)

**Top 3 Format Preferences for Democrats are Rock, News/Talk and AC**



### Rock

1. KQMT-F (Classic Rock)
2. KBCO-F (Adult Alternative)
3. KRFX-F (Classic Rock)

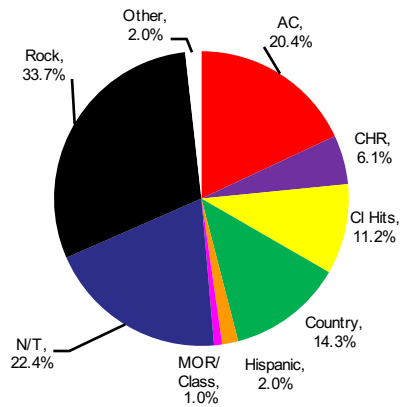
### News/Talk/Sports

1. KKFN-F (Sports)
2. KOA-A (News/Talk)
3. KJAC-F (Sports)

### Adult Contemporary

1. KOSI-F (Adult Contemporary)
2. KALC-F (Modern AC)
3. KIMN-F (Hot AC)

**Top 3 Format Preferences for Independents are Rock, News/Talk and AC**



### Rock

1. KQMT-F (Classic Rock)
2. KRFX-F (Classic Rock)
3. KBCO-F (Adult Alternative)

### News/Talk/Sports

1. KOA-A (News/Talk)
2. KKFN-F (Sports)
3. KHOW-A (Talk)

### Adult Contemporary

1. KALC-F (Modern AC)
2. KOSI-F (Adult Contemporary)
3. KIMN-F (Hot AC)

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

# TEXAS

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AUSTIN

DALLAS

HOUSTON

SAN ANTONIO



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



## REPUBLICANS

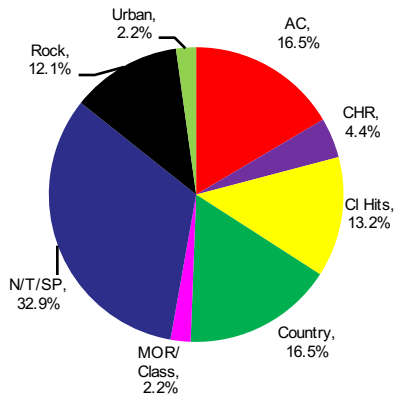


## DEMOCRATS



## INDEPENDENTS

**Top 3 Format Preferences for Republicans are News/Talk, Country and AC**



### News/Talk/Sports

1. KLBJ-A (News/Talk)
2. KTXF-F (Sports)
3. WOAI-A (News Talk)

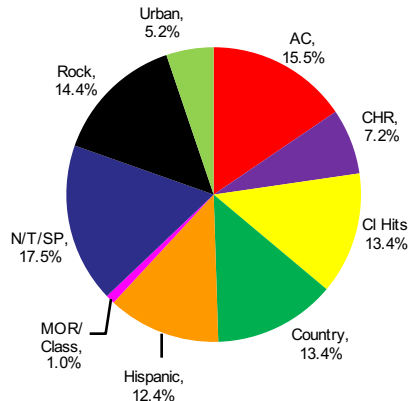
### Country

1. KVET-F (Country)
2. KOKE-F (Country)
3. KASE-F (Country)

### Adult Contemporary

1. KFMR-F (Christian AC)
2. KKMJ-F (Adult Contemporary)
3. KAMX-F (Hot AC)

**Top 3 Format Preferences for Democrats are News/Talk, AC and Rock**



### News/Talk/Sports

1. KLBJ-A (News/Talk)
2. KTXF-F (Sports)
3. KVET-A (Sports)

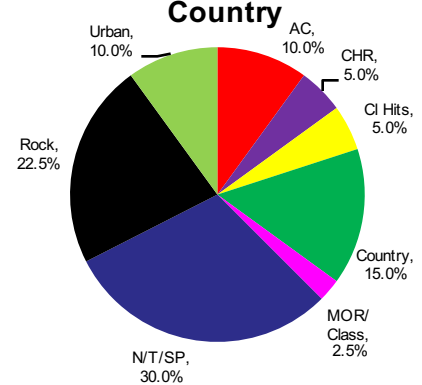
### Adult Contemporary

1. KKMJ-F (Adult Contemporary)
2. KFMR-F (Christian AC)
3. KAMX-F (Hot AC)

### Rock

1. KLBJ-F (Classic Rock)
2. KROX-F (Alternative)
3. KGSR-F (Adult Alternative)

**Top 3 Format Preferences for Independents are News/Talk, Rock and Country**



### News/Talk/Sports

1. KTXF-F (Sports)
2. KVET-A (Sports)
3. KLBJ-A (News/Talk)

### Rock

1. KLBJ-F (Classic Rock)
2. KGSR-F (Adult Alternative)
3. KTKX-F (Classic Rock)

### Country

1. KOKE-F (Country)
2. KVET-F (Country)
3. KASE-F (Country)

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

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



## REPUBLICANS

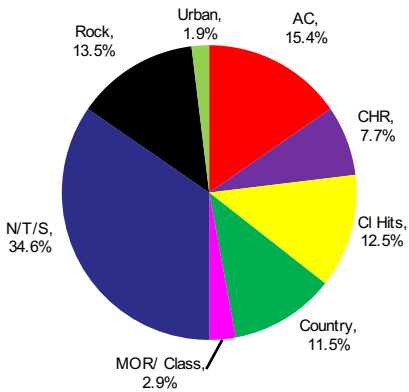


## DEMOCRATS



## INDEPENDENTS

**Top 3 Format Preferences for Republicans are News/Talk, AC, and Rock**



### News/Talk/Sports

1. WBAP-A (News/Talk)
2. KRLD-F (Sports)
3. KRLD-A (News/Talk)

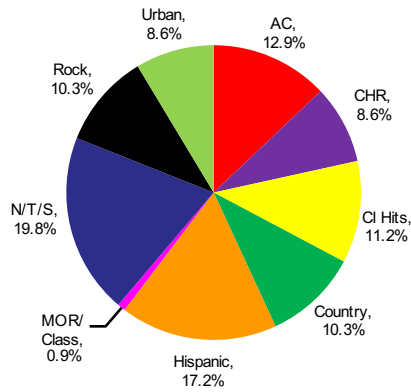
### Adult Contemporary

1. KLTY-F (AC)
2. KDMX-F (Hot AC)
3. KVIL-F (Hot AC)

### Rock

1. KZPS-F (Classic Rock)
2. KEGL-F (Active Rock)
3. KDGE-F (Alternative)

**Top 3 Format Preferences for Democrats are News/Talk, Hispanic, and AC**



### News/Talk/Sports

1. KTCK-A (Sports)
2. WBAP-A (News/Talk)
3. KRLD-F (Sports)

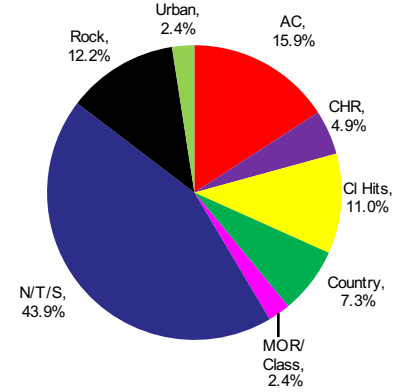
### Hispanic

1. KLNO-F (Mexican Regional)
2. KZZA-F (Spanish Adult Hits)
3. KMVK-F (Mexican Regional)

### Adult Contemporary

1. KLTY-F (AC)
2. KDMX-F (Hot AC)
3. KVIL-F (Hot AC)

**Top 3 Format Preferences for Independents are News/Talk, AC, and Rock**



### News/Talk/Sports

1. KTCK-A (Sports)
2. WBAP-A (News/Talk)
3. KRLD-F (Sports)

### Adult Contemporary

1. KLTY-F (AC)
2. KDMX-F (Hot AC)
3. KVIL-F (Hot AC)

### Rock

1. KZPS-F (Classic Rock)
2. KDGE-F (Alternative)
3. KEGL-F (Active Rock)

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

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



## REPUBLICANS

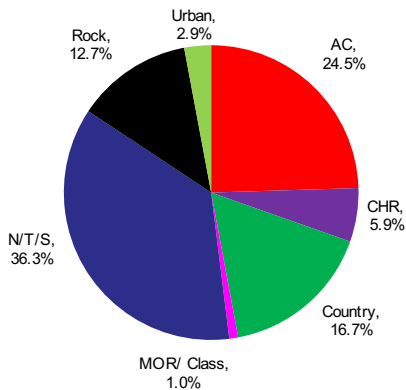


## DEMOCRATS

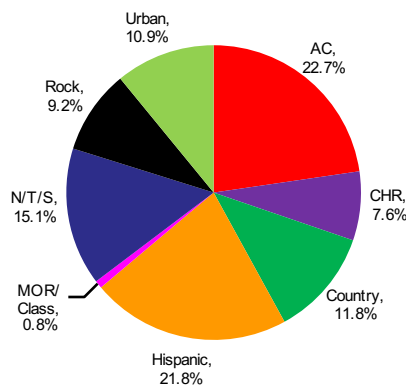


## INDEPENDENTS

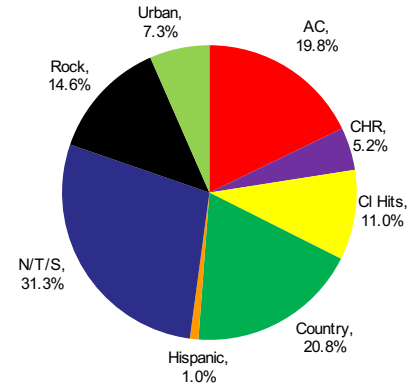
**Top 3 Format Preferences for Republicans are News/Talk, AC, and Country**



**Top 3 Format Preferences for Democrats are AC, Hispanic, and News/Talk**



**Top 3 Format Preferences for Independents are News/Talk, Country, and AC**



### News/Talk/Sports

1. KTRH-A (News/Talk)
2. KILT-A (Sports)
3. KBME-F (Sports)

### Adult Contemporary

1. KODA-F (AC)
2. KHMx-F (Hot AC)
3. KROI-F (Rhythmic AC)

### News/Talk/Sports

1. KILT-A (Sports)
2. KTRH-A (News/Talk)
3. KFNC-F (Sports)

### Adult Contemporary

1. KODA-F (AC)
2. KHMx-F (Hot AC)
3. KROI-F (Rhythmic AC)

### Hispanic

1. KLTN-F (Mexican Regional)
2. KOVE-F (Spanish Adult Hits)
3. KLOL-F (Spanish Cont.)

### Country

1. KKbQ-F (Country)
2. KTHT-F (Classic Country)
3. KILT-F (New Country)

### Country

1. KILT-F (New Country)
2. KKbQ-F (Country)
3. KTHT-F (Classic Country)

### News/Talk/Sports

1. KTRH-A (News/Talk)
2. KILT-A (Sports)
3. KBME-F (Sports)

### Adult Contemporary

1. KODA-F (AC)
2. KHMx-F (Hot AC)
3. KROI-F (Rhythmic AC)

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

# Finding the Perfect Radio Formats to Reach Republican, Democrat and Independent Voters in San Antonio



## REPUBLICANS

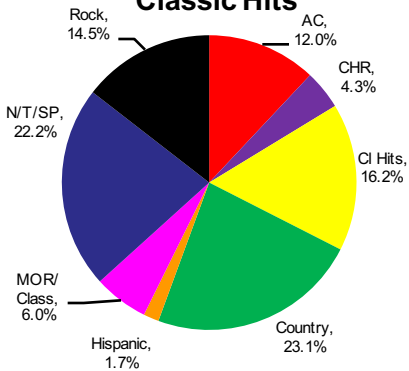


## DEMOCRATS



## INDEPENDENTS

**Top 3 Format Preferences for Republicans are Country, News/Talk and Classic Hits**



### Country

1. KAJA-F (Country)
2. KCYF-F (Country)
3. KKYX-A (Classic Country)

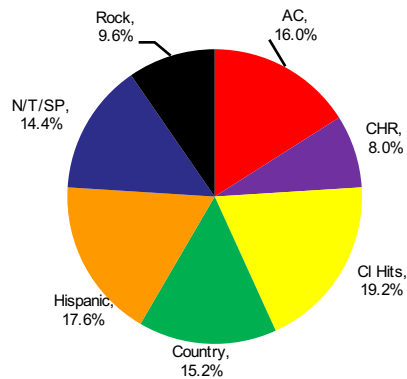
### News/Talk/Sports

1. WOAI-A (News/Talk)
2. KSTA-A (News/Talk)
3. KTKR-A (Sports)

### Classic Hits

1. KONO-F (Classic Hits)
2. KJXK-F (Adult Hits)
3. --

**Top 3 Format Preferences for Democrats are Classic Hits, Hispanic and AC**



### Classic Hits

1. KONO-F (Classic Hits)
2. KJXK-F (Adult Hits)
3. --

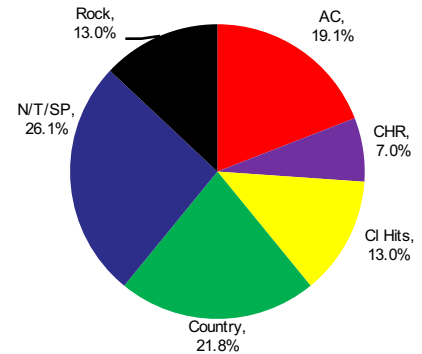
### Hispanic

1. KXTN-F (Tejano)
2. KROM-F (Mexican Regional)
3. KSAH-F (Mexican Regional)

### Adult Contemporary

1. KQXT-F (Adult Contemporary)
2. KSMG-F (Hot AC)
3. KZEP-F (Rhythmic AC)

**Top 3 Format Preferences for Independents are News/Talk, Country and AC**



### News/Talk/Sports

1. KSTA-A (News/Talk)
2. WOAI-A (News/Talk)
3. KZDC-A (Sports)

### Country

1. KAJA-F (Country)
2. KCYF-F (Country)
3. --

### Adult Contemporary

1. KSMG-F (Hot AC)
2. KQXT-F (Adult Contemporary)
3. --

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

# VIRGINIA

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NORFOLK

WASHINGTON, DC

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



## REPUBLICANS

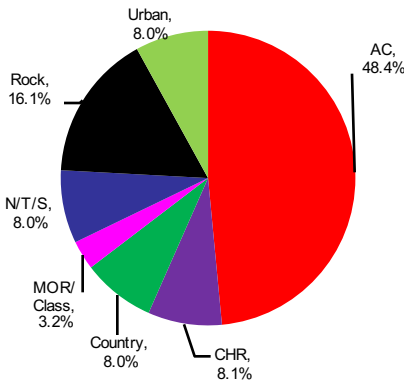


## DEMOCRATS

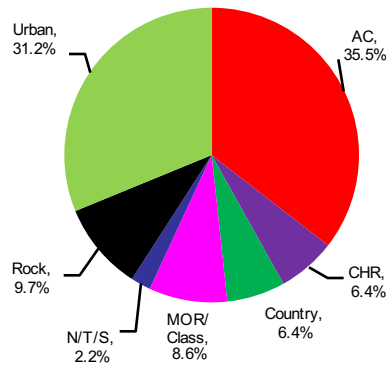


## INDEPENDENTS

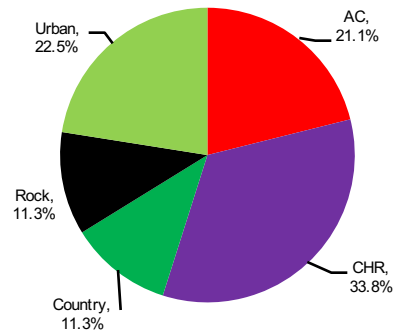
**Top 3 Format Preferences for Republicans are AC, Rock and CHR**



**Top 3 Format Preferences for Democrats are AC, Urban and Rock**



**Top 3 Format Preferences for Independents are CHR, Urban and AC**



### Adult Contemporary

1. WWDE-F (Adult Contemporary)
2. WWBW-F (Adult Contemporary)
3. WPTE-F (Modern AC)

### Adult Contemporary

1. WWBW-F (Adult Contemporary)
2. WWDE-F (Adult Contemporary)
3. WPTE-F (Modern AC)

### Contemporary Hit Radio

- 1t WNVZ-F (Rhythmic CHR)
- 1t WVHT-F (CHR)
3. WNOH-F (CHR)

### Rock

1. WAFX-F (Classic Rock)
2. WNOR-F (Active Rock)
3. -

### Urban

1. WVKL-F (Urban AC)
2. WGH-A (Inspirational)
3. WOWI-F (Urban CHR)

### Urban

1. WVKL-F (Urban AC)
2. WOWI-F (Urban CHR)
3. -

### Contemporary Hit Radio

1. WVHT-F (CHR)
2. WNOH-F (CHR)
3. WNVZ-F (Rhythmic CHR)

### Rock

1. WAFX-F (Classic Rock)
2. WNOR-F (Active Rock)
3. -

### Adult Contemporary

1. WPTE-F (Modern AC)
2. -
3. -

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

# Finding the Perfect Radio Formats to Reach Republican, Democrat and Independent Voters in Washington, DC



## REPUBLICANS

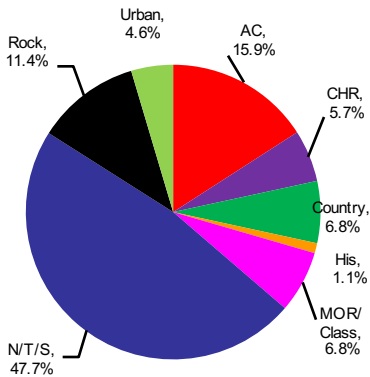


## DEMOCRATS



## INDEPENDENTS

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



### News/Talk/Sports

1. WTOP-F (All News)
2. WMAL-F (News Talk)
3. WJFK-F (Sports)

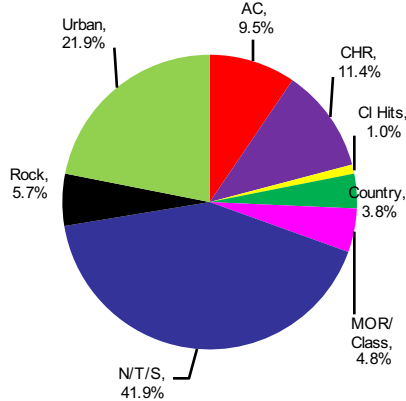
### Adult Contemporary

1. WASH-F (Adult Contemporary)
2. WIAD-F (Hot AC)
3. WAFY-F (Hot AC)

### Rock

1. WBIG-F (Classic Rock)
2. WWDC-F (Alternative)
3. -

**Top 3 Format Preferences for Democrats are N/T/S, Urban and CHR**



### News/Talk/Sports

1. WTOP-F (All News)
2. WMAL-F (News Talk)
3. WJFK-F (Sports)

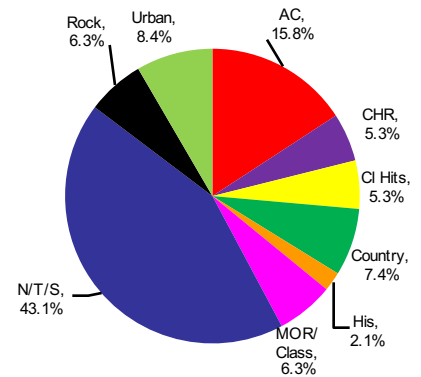
### Urban

1. WHUR-F (Urban AC)
2. WMMJ-F (Urban AC)
3. WPRS-F (Inspirational)

### Contemporary Hit Radio

1. WPGC-F (Rhythmic CHR)
2. WIHT-F (CHR)
3. WRQX-F (CHR)

**Top 3 Format Preferences for Independents are N/T/S, AC and Urban**



### News/Talk/Sports

1. WTOP-F (All News)
2. WMAL-F (News Talk)
3. WTEM-A (Sports)

### Adult Contemporary

1. WASH-F (Adult Contemporary)
2. WIAD-F (Hot AC)
3. WAFY-F (Hot AC)

### Urban

1. WKYS-F (Urban CHR)
2. WMMJ-F (Urban AC)
3. WHUR-F (Urban AC)

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