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.
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.
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.
  - 9%

- **The Undecided Vote**: Percentage of eligible voters who are attending the primaries, but are undecided on a candidate.
  - 30%

- **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.
  - 40%

### The Power of Local Television

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

- **Broadcast TV**: 86%
- **Local TV News**: 62%
- **Network Prime**: 59%
- **Cable News Networks**: 27%

### IMPORTANCE OF ISSUES
#### BY PARTY AFFILIATION

<table>
<thead>
<tr>
<th>Issue</th>
<th>All Primary-Goers</th>
<th>Democrats</th>
<th>Republicans</th>
<th>Independents</th>
</tr>
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<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>
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<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>
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<tr>
<td>Immigration</td>
<td>23%</td>
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<td>Gun Control / Rights</td>
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</tr>
<tr>
<td>Jobs</td>
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<tr>
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<tr>
<td>Foreign Policy</td>
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<td>9%</td>
<td>13%</td>
<td>13%</td>
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<tr>
<td>The Government</td>
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<td>7%</td>
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<td>2%</td>
<td>8%</td>
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<tr>
<td>Women’s Rights</td>
<td>7%</td>
<td>12%</td>
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<td>6%</td>
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<tr>
<td>Abortion</td>
<td>6%</td>
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<td>Wall Street</td>
<td>4%</td>
<td>6%</td>
<td>2%</td>
<td>5%</td>
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<tr>
<td>Gay Marriage</td>
<td>4%</td>
<td>5%</td>
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<tr>
<td>Energy Policy</td>
<td>3%</td>
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<td>1%</td>
<td>5%</td>
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</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.

## 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

<table>
<thead>
<tr>
<th>Issue</th>
<th>National Cable TV News</th>
<th>Newspaper</th>
<th>Local TV News</th>
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<tr>
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<td>Healthcare</td>
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<td>72%</td>
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<td>Gun Control/Rights</td>
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<td>51%</td>
<td>59%</td>
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<tr>
<td>Energy Policy</td>
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<td>54%</td>
<td>65%</td>
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<tr>
<td>Primary-goer Average</td>
<td>42%</td>
<td>58%</td>
<td>69%</td>
</tr>
</tbody>
</table>

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.

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.

IN THE INTEREST OF THE ECONOMY

38% of Primary-goers say The Economy is an issue that will impact their choice for President.

WHAT PARTY THEY BELONG TO

- 43% Democratic
- 37% Republican
- 21% Independent

WHO THEY ARE VOTING FOR

- 23% Hillary
- 14% Bernie
- 16% Trump
- 7% Cruz
- 5% Kasich
- 35% Undecided

HOW THEY SKEW DEMOGRAPHICALLY

- 43% Men
- 41% HHI $75K+
- 40% Hispanic
- 39% Age 35+
- 39% White
- 37% Black
- 36% HHI < $75K
- 36% Age 18-34
- 33% Women

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
- 28% Republican
- 22% Independent

WHO THEY ARE VOTING FOR
- 26% Hillary
- 17% Bernie
- 10% Trump
- 6% Cruz
- 3% Kasich
- 38% Undecided

HOW THEY SKEW DEMOGRAPHICALLY

WHAT MEDIA PLATFORMS THEY USE
- Radio 95%
- Broadcast TV 91%
- PC Internet 91%
- Cable TV 88%
- Mobile Internet 62%
- Newspaper 60%
- Audio Streaming 44%

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 NATIONAL SECURITY

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

WHAT PARTY THEY BELONG TO

- 33% Democratic
- 50% Republican
- 18% Independent

WHO THEY ARE VOTING FOR

- 18% Hillary
- 7% Bernie
- 20% Trump
- 11% Cruz
- 5% Kasich
- 38% Undecided

HOW THEY SKEW DEMOGRAPHICALLY

- More Important
- Less Important

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.

IN THE INTEREST OF IMMIGRATION

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

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

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

WHAT MEDIA PLATFORMS THEY USE

94% RADIO

92% PC

89% BROADCAST TV

84% CABLE TV

62% MOBILE INTERNET

56% NEWSPAPER

43% 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.

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!

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Democrat Primary Election Index</th>
<th>Republican Primary Election Index</th>
<th>Independent Primary Election Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early Morning</td>
<td>123</td>
<td>103</td>
<td>84</td>
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<tr>
<td>Daytime</td>
<td>120</td>
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<td>Prime Access</td>
<td>123</td>
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<td>Prime</td>
<td>119</td>
<td>105</td>
<td>96</td>
</tr>
<tr>
<td>Late Fringe</td>
<td>120</td>
<td>100</td>
<td>74</td>
</tr>
</tbody>
</table>

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

**Democrat Primary Early Fringe Shows:**
- Non-Subscriber
- Erie News Now @ 6
- Erie News Now @ 5:30
- WICU

**Republican Primary Prime Access Shows:**
- Jeopardy! (WSEE)
- Wheel of Fortune (WSEE)
- Inside Edition (WICU)
- Non-Subscriber

**Independent Primary Prime Access Shows:**
- Jeopardy! (WSEE)
- Wheel of Fortune (WSEE)
- Non-Subscriber
- Inside Edition (WICU)
- WICU

**Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:**

**Democrat Primary Election Voter in Early Fringe***:
- Broadcast: 67%
- Cable News: 26%
- Cable Entertainment: 7%

**Republican Primary Election Voter in Prime Access**:
- Broadcast: 56%
- Cable News: 36%
- Cable Entertainment: 8%

**Independent Primary Election Voter in Prime Access**:
- Broadcast: 65%
- Cable News: 18%
- Cable Entertainment: 17%

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*Of the HH with Democrat Primary Election Voters Viewing Daytime, 67% view Broadcast, 26% view cable news nets, 7% view entertainment nets. Broadcast (ABC, CBS, NBC, FOX, CW, MyNet, ION); Cable News Nets (CNN, FOXNC, 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!

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</tr>
<tr>
<td>Late Fringe</td>
<td>129</td>
<td>109</td>
<td>95</td>
</tr>
</tbody>
</table>

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

Democrat Primary Early Fringe Shows:
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Jeopardy (WHP)
- Wheel of Fortune (WHP)

Republican Primary Prime Access Shows:
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Jeopardy (WHP)
- Wheel of Fortune (WHP)

Independent Primary Prime Access Shows:
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber

Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:

Democrat Primary Election Voter in Early Fringe*:
- 66%
- 26%
- 8%

Republican Primary Election Voter in Prime Access:
- 61%
- 28%
- 11%

Independent Primary Election Voter in Prime Access:
- 60%
- 20%
- 20%

*Of the HH with Democrat Primary Election Voters Viewing Early Fringe, 66% view Broadcast, 26% view cable news nets, 8% view entertainment nets. Broadcast (ABC, CBS, NBC, FOX, CW); Cable News Nets (CNN, FNC, HLN, MSNIBC); Entertainment Nets 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!

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<tr>
<td>Late Fringe</td>
<td>126</td>
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<td>87</td>
</tr>
</tbody>
</table>

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

**Democrat Primary Daytime Shows:**
- KDKA-TV News at Noon
- Price Is Right
- Non-Subscriber
- Non-Subscriber
- Let’s Make A Deal

**Republican Primary Prime Access Shows:**
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- The Insider

**Independent Primary Prime Access Shows:**
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- Non-Subscriber
- The Insider

**Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:**

- **Democrat Primary Election Voter in Daytime**: 61% Broadcast, 29% Cable News, 10% Cable Entertainment
- **Republican Primary Election Voter in Prime Access**: 62% Broadcast, 28% Cable News, 10% Cable Entertainment
- **Independent Primary Election Voter in Prime Access**: 58% Broadcast, 16% Cable News, 26% Cable Entertainment

*Of the HH with Democrat Primary Election Voters Viewing Daytime, 61% view Broadcast, 29% view cable news nets, 10% view entertainment nets. Broadcast (ABC, CBS, NBC, FOX, CW); Cable News Nets (CNN, Fox News, 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!

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</tr>
<tr>
<td>Late Fringe</td>
<td>125</td>
<td>103</td>
<td>88</td>
</tr>
</tbody>
</table>

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

- **Democrat Primary Prime Access Shows:**
  - Newswatch 16 at 7pm
  - Inside Edition
  - Non-Subscriber

- **Republican Primary Early Fringe Shows:**
  - Newswatch 16 at 6pm
  - Newswatch 16 at 5:30pm
  - Newswatch 16 at 5pm
  - Newswatch 16 at 4:30pm
  - Newswatch 16 at 4pm

- **Independent Primary Early Morning Shows:**
  - Newswatch 16 at 6:30am
  - Newswatch 16 at 6am
  - Good Morning America
  - Non-Subscriber

**Broadcast Dominates Cable News & Entertainment Among Primary Election Voters:**

- **Democrat Primary Election Voter in Prime Access***
  - 67% Broadcast
  - 25% Cable News
  - 8% Cable Entertainment

- **Republican Primary Election Voter in Early Fringe**
  - 62% Broadcast
  - 26% Cable News
  - 12% Cable Entertainment

- **Independent Primary Election Voter in Early Morning**
  - 54% Broadcast
  - 31% Cable News
  - 15% Cable Entertainment

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*Of the HH with Democrat Primary Election Voters Viewing Prime Access, 67% view Broadcast, 25% view Cable News, 8% view Cable Entertainment. 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.