nextradio®

Political Fatigue:

How Radio Can Wake Up Voters In An Election Season

*NextRadio Listeners Make their Voices
Heard in In-App Political Survey
October, 2016*

Contents

Introduction

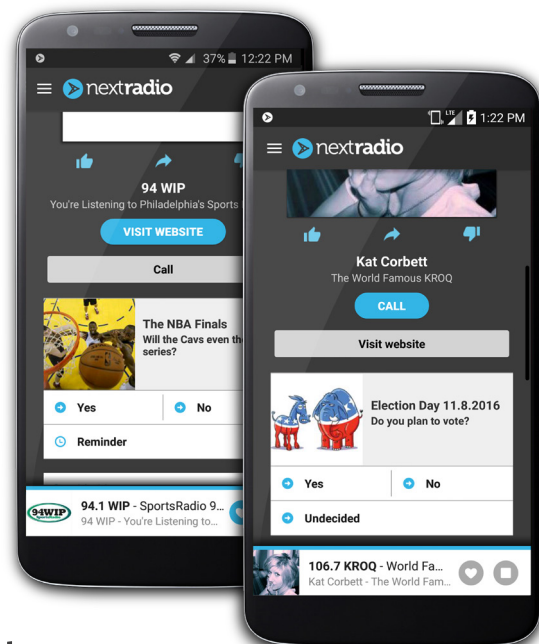
About the NextRadio Voter Survey

Despite the colorful rhetoric, the glitzy conventions, the near-constant pings of Tweets and hashtags, the abundance of memes, and the fact that everyone has something to say about the upcoming election, voters are unenthusiastic.

Recently, NextRadio, the smartphone app that provides free, portable FM radio listening, conducted an in-app survey that asked one simple question:
Election Day 11.8.2016: Do you plan to vote?

As you'll see in the coming pages, the answer to this question pointed to an unenthusiastic sentiment about the pending election. But, now is the time for campaigns to grow voter enthusiasm and to leverage media in new ways. After all, local and national broadcasters traditionally enjoy an infusion of campaign ad spending during election seasons. This year is no different. A widely cited report from market research firm Borrell Associates says we're in the midst of a record year for political advertising, with an anticipated $916 Million being spent on radio[1].

It's our hope that our simple survey will offer campaigns some fresh ideas on how they can leverage radio and mobile media to further their candidates – both nationally and down-ballot.

That's a lot of money in play, but campaigns must maximize their spend.
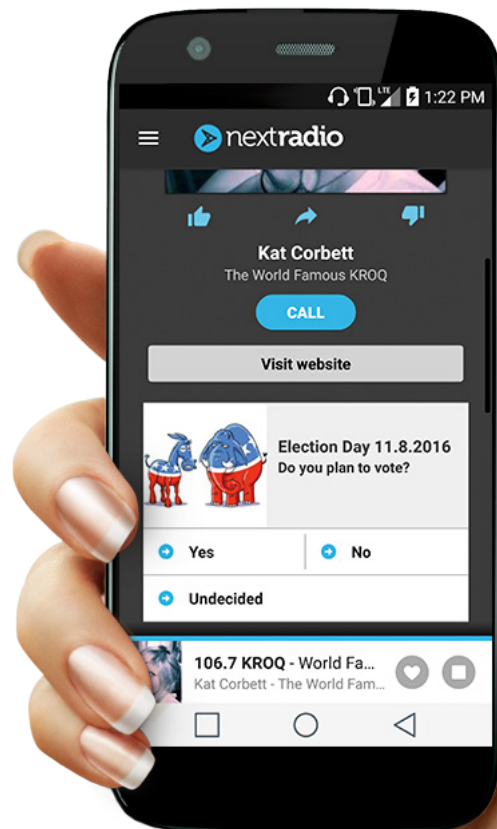
NextRadio Voter Survey

The Results

NextRadio polled its user base with the question:
"Election Day 11.8.2016: Do you plan to vote?"

Survey Overview:

✓   40,000 NextRadio users

✓   Listeners in 50 states viewed the poll

✓   Campaign aired June 19 to July 6, 2016

✓   10% response rate- 3,700

This section examines survey respondents in greater depth, illustrates their interest in voting, breaks out how voting varies by radio media metrics such as format and daypart, and examines survey results on the local level.

Unenthusiastic Voters Weigh Heavily on the Election

The NextRadio survey finds that more than half (58%) of respondents either do not plan to vote on Election Day, or are undecided about doing so.

Of those polled, 35% said "No" they do not plan to vote, and 23% said they are "Undecided" about voting. There could be a myriad of reasons why respondents lack enthusiasm: perhaps they are not registered to vote, do not have an interest in supporting a candidate, or something else. Whatever the case may be, respondents of the NextRadio survey need an electoral energy boost.

Campaigns Can Target the Unenthusiastic via Country and Spanish Music Formats

NextRadio examined voter results across radio format[2]. Country and Spanish Music are among the top three radio formats for both "Undecided" survey respondents and "No" survey respondents. Among Country radio listeners, 25% stated that they were "Undecided," and 41% said "No" they do not intend to vote in November. A similar sentiment was expressed by Spanish Music listeners with 24% undecided and 39% stating they are not planning to vote.

Examining radio formats by voter group, the analysis finds that Rock and Country listener respondents are the most undecided about showing up to vote in November, while Top 40 and Country are the top formats for those who do not plan to vote. Alternately, News/Talk/Info and R&B reign for respondents who said they intend to show up on November 8.

Election Day 11.8.2016: Do you plan to vote?
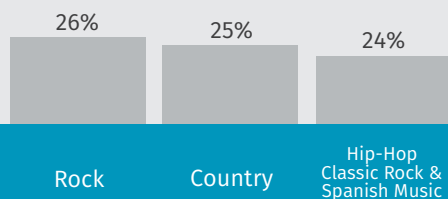*(% survey respondents)*

58% of survey respondents are unenthusiastic about voting

23%

42%

35%

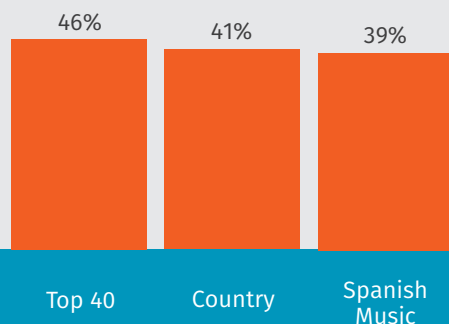Undecided   No   Yes
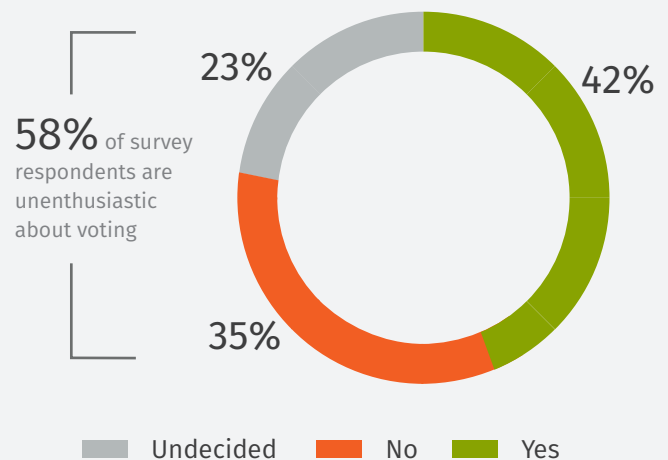
Source: NextRadio Voting Survey 2016

Top Radio Formats for Voter Respondents

Election Day 11.8.2016: Do you plan to vote? (% survey of respondents)
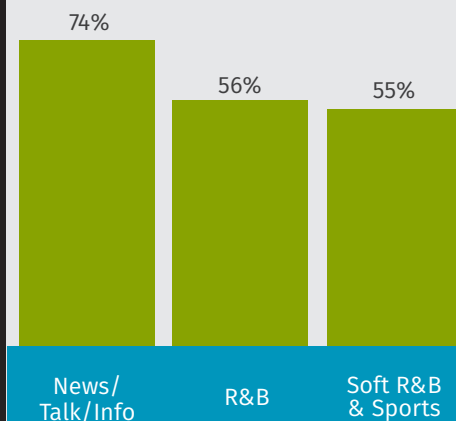
"Undecided" Respondents

Rock	Country	Hip-Hop Classic Rock & Spanish Music
26%	25%	24%

"No" Respondents

Top 40	Country	Spanish Music
46%	41%	39%

"Yes" Respondents

News/Talk/Info	R&B	Soft R&B & Sports
74%	56%	55%

	YES	NO	UNDECIDED
Spanish Music	37%	39%	24%
Hip Hop	39%	37%	24%
Top 40	31%	46%	23%
R&B	56%	26%	18%
Adult Hits	42%	37%	21%
Country	34%	41%	25%
Sports	56 %	23%	21%
Classic Rock	46%	30%	24%
Rock	49%	25%	26%
News/Talk	74%	18%	8%
Oldies	49%	30%	21%
Soft R&B	55%	25%	20%

37% of survey respondents who listen to the Spanish Music form indicate they will vote on Election Day 11.8.16; **39%** do not intend to vote and **24%** are Undecided

Daypart and Day of Week Data Reveal Best Times to Reach Voter Groups

NextRadio examined when different respondent groups were tuning in to FM broadcasts on the app – viewing the question about voting and answering it.

Overall, the highest numbers of viewing appeared on Wednesdays and Tuesdays. Morning weekday drive time garnered the highest percentage of "Yes" responses. Smart campaign money, however, might buy weekend radio schedules to help get out the vote.

✓ More people listening on the weekends claimed to be "Undecided" or said "No" to the question of voting in November.

✓ Those "Undecideds" and "Nos" accounted for a full 62% of Sunday responses to the question and 60% of Saturday responses.

Campaign Tip:

The best opportunity for reaching those who say they are still unsure or intend not to vote is a weekend radio buy.

The Local Vote: A State-By-State Look at Voting Enthusiasm by Party

Top 15 States Represent a Cross-Section of Political Parties

NextRadio zeroed in on the 15 states with the highest level of participation in its survey to examine their political party leanings, utilizing the Electoral College map from 270towin.com. These leading survey states represent a cross-section of political party interest.
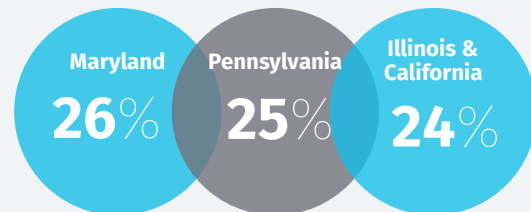
✓ 6 of the top survey states[3] are Democratic (Washington D.C., New York, Illinois, Maryland, Michigan, and California)

✓ 4 have at times been categorized as neutral/swing states (Pennsylvania, Ohio, North Carolina, and Florida)

✓ 5 are Republican (Missouri, Indiana, Arizona, Georgia, and Texas)

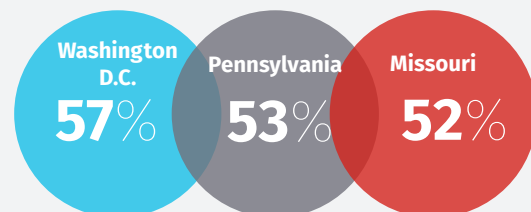## Maryland and Pennsylvania are the Top States for Undecided Voters

Twenty-six percent of respondents in Maryland and 25% in Pennsylvania said they are undecided about turning out to vote at the polls on November 8.

% survey respondents who responded to the question "Election Day 11.8.16: Do you plan to vote?"

Undecided about Voting

Maryland **26**%	Pennsylvania **25**%	Illinois & California **24**%

Plan to Vote

Washington D.C. **57**%	Pennsylvania **53**%	Missouri **52**%

Do Not Plan to Vote

California **42**%	Florida **39**%	Texas & Georgia **38**%
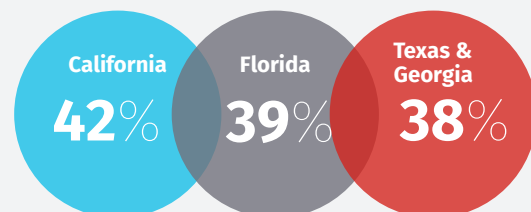
Source: NextRadio Voting Survey, 2016, Top 15 States by survey participation only. Party affiliation by state according to 270towin.com

Zeroing In on the Swing States

Many sources from all corners of the political world – such as Politico.com and 270towin.com – include Pennsylvania, Ohio, and Florida on their list of Swing States.

NextRadio examined its voter survey data on these Swing States, uncovering that half of survey respondents in Pennsylvania and Ohio plan to vote in November.

Pennsylvania has the highest percentage of "Undecideds" – 25%. Florida is split with 42% intending to vote, but the state also has the highest percentage of respondents who do not plan to vote at 39%.

Survey respondents from these Swing States represent a cross-section of ages. Eleven percent of respondents in Pennsylvania are ages 18-24, and, together with Florida, this state also had the highest percentage of 65+ respondents (19%).
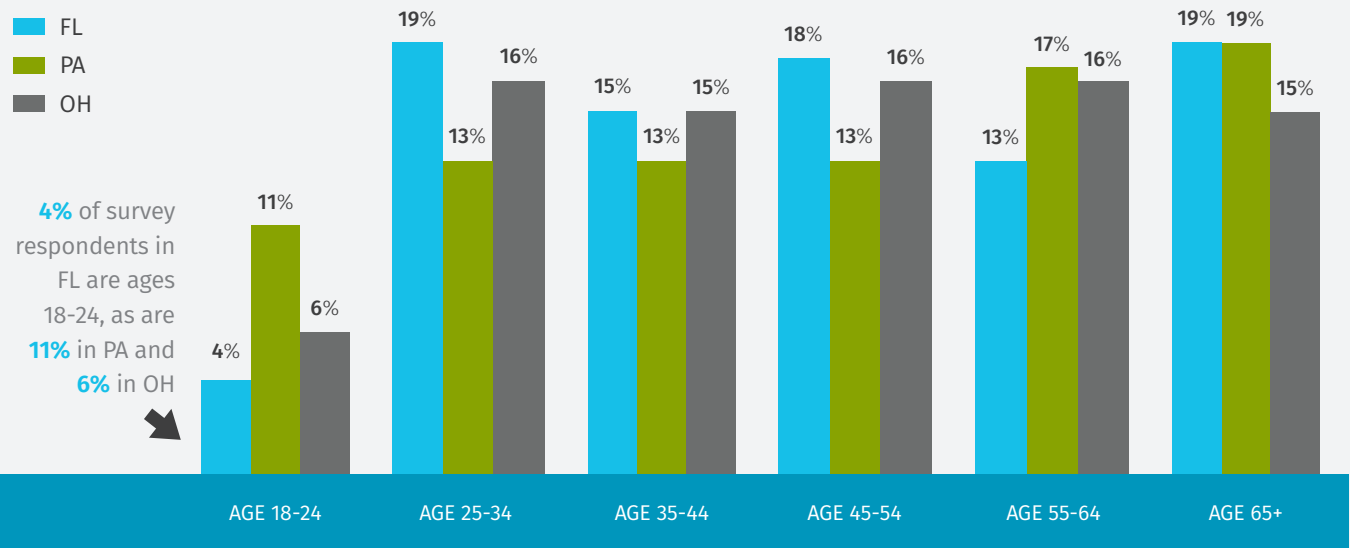
Voter Enthusiasm in Swing States

Election Day 11.8.2016: Do you plan to vote?
(% of survey respondents)

	Yes	No	Undecided
Pennsylvania	**53%**	**22%**	25%
Florida	**42%**	**39%**	19%
Ohio	**50%**	**36%**	14%
NextRadio Voting Survey Average	**42%**	**35%**	23%

53% of survey respondents in PA said they plan to vote on 11.8.16, **22%** in this state said they would not, and **25%** are undecided

Voter Survey Respondent Ages by State

Election Day 11.8.2016: Do you plan to vote?
(% of survey respondents)

Legend:
- FL
- PA
- OH

4% of survey respondents in FL are ages 18-24, as are **11%** in PA and **6%** in OH

	AGE 18-24	AGE 25-34	AGE 35-44	AGE 45-54	AGE 55-64	AGE 65+
FL	4%	19%	15%	18%	13%	19%
PA	11%	13%	13%	13%	17%	19%
OH	6%	16%	15%	16%	16%	15%

Source: NextRadio Survey, Election Day 11.8.2016: Do you plan to vote?
(May not add to 100 due to nonresponse)

The Value of Radio and FM on the Smartphone in Targeting Voters

NextRadio FM broadcasts on the smartphone are unique in their ability to capture information about distinct voter groups. They also provide opportunities to interact with campaigns – either through in-app CTAs, enhanced visuals, or customized messaging.

Combining the reach and frequency power of radio that leading national and local brands have always enjoyed with the ability to build more interactive components gives political campaigns more ways to reach and target voters.

FM on the Smartphone Connects Candidates with Locals and their Diversity

A recent study conducted by NextRadio and Edison Research[4] cited radio's unique, traditional position as a center of communities across the country. As candidates seek to make local connections, utilizing radio becomes essential. According to the NextRadio/Edison Research Survey, 50% of respondents who listen to FM radio said it was for community news. Over one-third (35%) of respondents frequently or sometimes attend local events hosted by an FM station.

Among the states with the highest level of survey participation[2], Arizona had the highest percentage of respondents who were Millennials – ages 18-34 – at 40%. Illinois (32%) and North Carolina (30%) round out the top three states for Millennial respondents.

Interest in participating in politics among Hispanics was apparent in our NextRadio in-app survey. One-quarter (25%) of those who participated were Hispanic. Among the states with the highest levels of survey participation, California, Texas, and Florida led for Hispanic respondents. More than half (52%) of respondents in California were Hispanic, as were 47% in Texas and 38% in Florida. We would note that the demographic data in our voting survey isn't surprising, and is reflective of the U.S. population.

Campaigns Can Further Activate Audiences with Visually-Appealing Radio Content

FM broadcasts on smartphones are unique because they enable the listener to interact with the radio broadcast.

An analysis of NextRadio listening hours this past spring revealed that when broadcasts add visually-appealing content to the app, they garner better overall media success metrics, including:

3x
more tune ins
year-over-year

+2
hours more listening,
per listener, per month

1.6x
growth in the time spent
listening year-to-year

What does this mean for campaigns? NextRadio research data suggests that in-app visual displays go a long way in enhancing the engagement of a message. Leveraging in-app displays could create unique ways to interact with voter groups and measure those interactions.

Ideas for Campaigns

With more than half (58%) of voters telling us that they are unenthusiastic about voting, it's very clear that campaigns need to get voters excited about the election.

Nothing is stopping the diversification of media and tech consumption of the American voter. An equally diverse arsenal of tactics, technologies, and data is required to connect with voters and get them to the polls.

Campaigns can amp up their radio plans through considering digital broadcasts as an essential extension of over-the-air FM. In addition to building on the already expansive reach of radio, digital broadcasts collect data that are essential in informing a campaign's success in reaching voters and getting them to take action. NextRadio continuously collects data on its listeners, and these insights cover:

Radio usage: What was playing when they were listening, station information on reach/frequency, and other radio media metrics

Digital media interactions: How many times an in-app ad was viewed, then clicked or shared; ad messaging that had the best success in driving actions

Location: Where the user was when the ad played, and determining if that prompted them to take immediate local action, such as shopping at a store or attending a neighborhood event

Audience details so you know where you can make an impact: Whether it's Swing States or "Undecided" voters, target the audiences you need to reach using first-party, attributable data

This digital journey information is key in informing a wide array of campaign insights, so candidates can understand better how to spark action among key constituencies. And, as we know from our NextRadio poll, building that enthusiasm will be key for getting out the vote in this and future election seasons.

Source and Appendix

About the NextRadio Voter Survey

VOTING SURVEY METHODOLOGY:

NextRadio listeners were presented an in-app visual located below the artwork of the station they were tuned into. The visual said "Election Day 11.8.16: Do you plan to vote?" and the user could click Yes, No, or Undecided. Over 40,000 unique NextRadio app users in all 50 states viewed the poll during a campaign airing June 19 to July 6, 2016, and 10% (about 3,700 app users) answered the poll.

NOTES

[1] Only radio formats with a response rate of 50 or higher are included in the format rankings.

[2] The state analysis includes only the 15 states with the highest levels of participation in the survey.

[3] The data is derived from a NextRadio-Edison online survey of 2,094 adult smartphone users recruited through NextRadio's database. Survey dates: April 22 to June 2, 2016. Sample base is made up of people who signed up for information about NextRadio.

[4] NextRadio/ Edison Research study April 2016, base of FM radio listeners

Interested in activating voters in your market?

Contact NextRadio to find out how your campaign can make an impact. Email Tom Doran, VP of Sales for NextRadio, tdoran@nextradioapp.com

Questions about this report? Contact Maura Kautsky, mkautsky@nextradioapp.com

About NextRadio

TagStation, LLC is a wholly owned subsidiary of Emmis Communications Corporation. TagStation, LLC has developed the TagStation® service to provide radio stations with artist and title information and unique interactivity with listeners.

With partial funding from NAB Labs, TagStation also developed the NextRadio® hybrid radio smartphone app which uses TagStation cloud services to provide a rich FM radio listening experience on smartphones and tablets by combining the devices' built-in FM tuner and the internet. NextRadio, LLC is a wholly-owned subsidiary of TagStation, LLC and serves as the principle distributor of the NextRadio App. Dating to 2013, TagStation, LLC and NextRadio, LLC are headquartered in Indianapolis, IN with offices in Indianapolis and Chicago, IL. For more information about TagStation, visit TagStation.com. For more information about NextRadio, visit NextRadioApp.com.