

IT'S A MATTER OF TRUST

Winning Over The Undecided Voter



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Our Platform

In our first report stemming from our 2018 Midterm Election Survey entitled ***It's A Matter Of Trust: Media's Influence On Voters***, we talked about the prevalence of "fake news" on some platforms, especially social media, and the potential impact it has on key voting constituents across age, gender, ethnicity, occupation and political party affiliation.

Because of the dissemination of "fake news" we also discussed the importance of media that voters can trust; media that widely reports accurate information so that people can make informed decisions on political candidates and key issues facing the country. It's trusted media, and its advertising by extension, that has the ability to create a bond with voters which helps guide them in their decision-making process through the election cycle.

As a companion piece to that first report, we have taken an in-depth look at another subset of survey respondents: The "Undecided Voter."

Not surprisingly, the same concerns and desires exist for the "undecided voter" as they do for other key voting constituents. "Fake news" is a major concern for them during the election; therefore, they too desire trusted, accurate media sources to get their information.

Much like other voting constituents, it's also no surprise that multi-screen TV brands are the most trusted source for undecided voters. This trust to deliver the most accurate, professional political information heightens their attentiveness level and makes it the most influential platform, from both a content and advertising perspective, to win over the undecided voter right up to election day.

Methodology

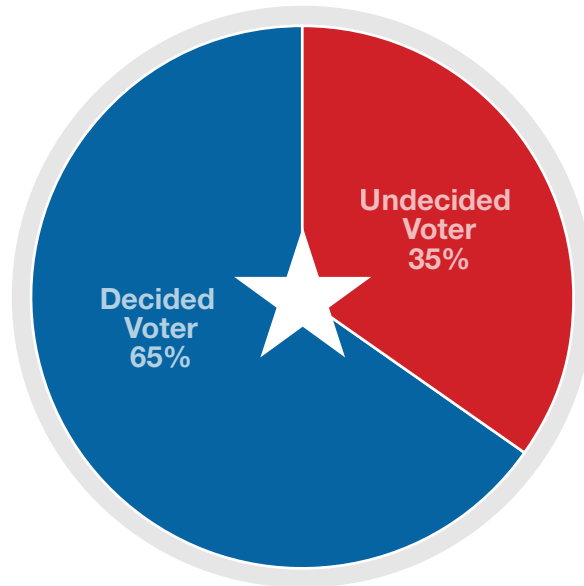
The VAB commissioned Research Now to conduct the **2018 Mid-Term Election Survey** fielded between May-June 2018. The study is based on 1,000 respondents from a randomly selected national internet panel whose demographics are representative of the U.S. Census. All respondents are registered adult 18+ voters or people that plan on voting in the 2018 mid-term local elections.

As a supplement to our first report on the mid-term elections released over the summer – ***It's A Matter Of Trust: Media's Influence On Voters*** – our mission here was to understand better how 12 different media platforms impact the decision-making process for the nearly 25% of survey respondents identified as *“undecided voters who expect to make their decision one week or less before election day.”*

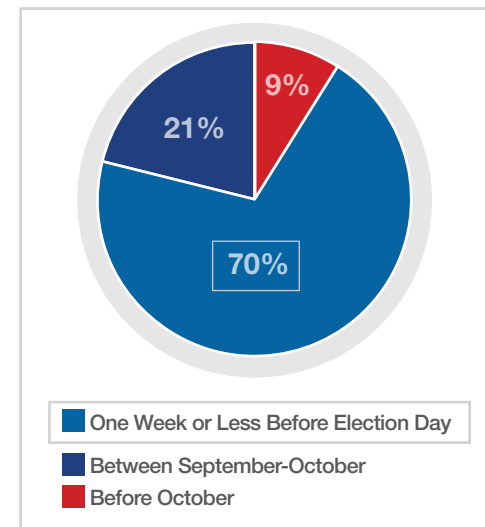
Who Are The Undecided Voters?

Almost One-Quarter Of Total Respondents Are Undecided Voters Who Expect To Make Their Decision Very Close To Election Day

What Is Your Current Status Regarding Who You're Going To Vote For In The 2018 Elections?



When Do You Typically Make Your Final Decision?

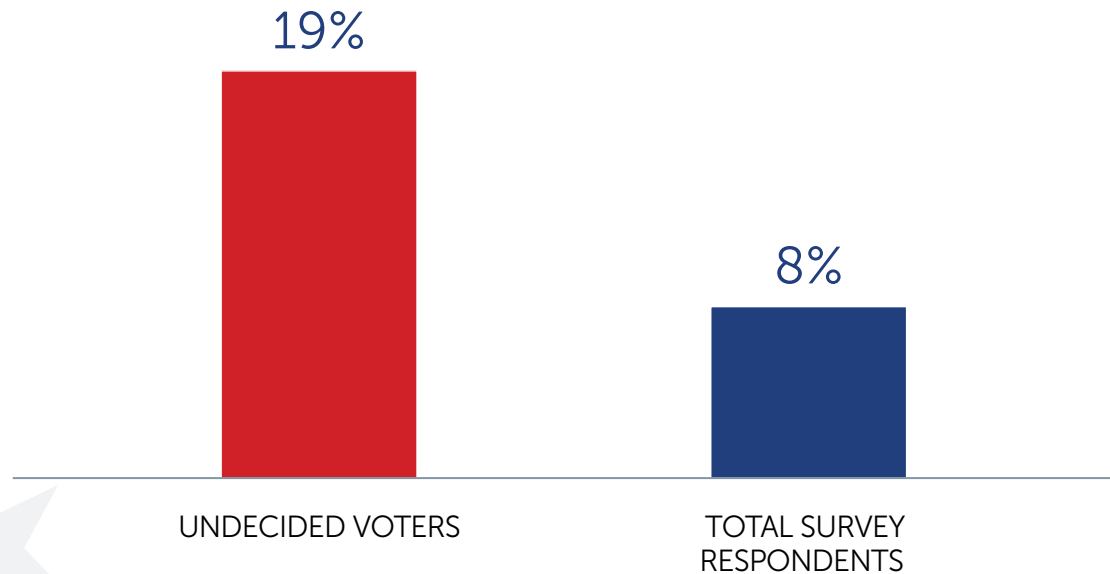


The following analysis will specifically focus on the undecided voters who expect to make their voting decision one week or less before election day

Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q13: I am currently undecided regarding who I am going to vote for in the 2018 midterm election. Q26: When do you typically make your final decision regarding who you are going to vote for in November's mid-term/local elections? Total Survey Respondents: 1,003. Voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election = 243.

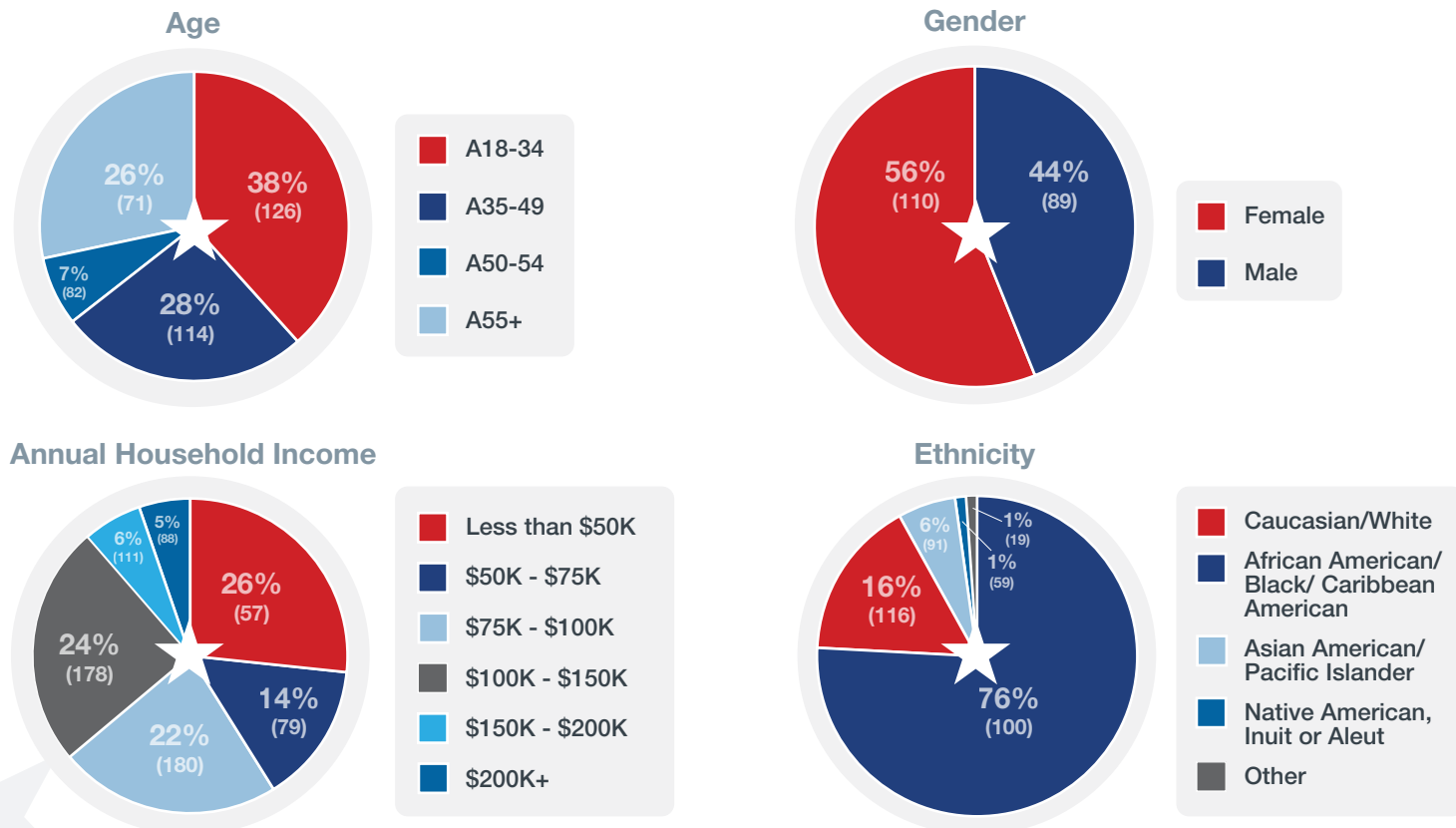
Undecided Voters Are More Than Twice As Likely To Be First-Time Voters Than Total Survey Respondents

“I plan on voting for the first time in the 2018 midterm elections”



Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q13: Which of the following statements are true for you: I plan on voting for the first time. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

Undecided Voters Are More Likely To Be Affluent Adults 18-49, With A Slight Skew Towards Females 18-34



(Index) = Survey Respondents / U.S. Population

Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003. Within ethnicity, 17% of undecided voters are Hispanic, a 98 index against the US population.



Today's Hot Button Issue: "Fake News" And Who Can You Trust?

3 Out of 4 Undecided Voters Are Concerned About Fake News On Social Media And The Influence It May Have On Elections

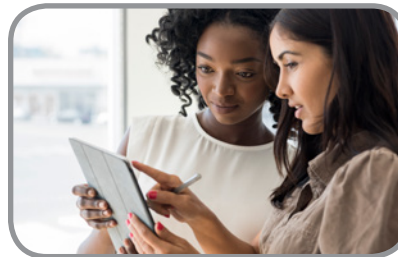
% Undecided Voters Who Agree

"I AM CONCERNED BY THE AMOUNT OF FAKE NEWS ON SOCIAL MEDIA"

75%

"I AM CONCERNED ABOUT THE INFLUENCE FAKE NEWS MAY HAVE ON VOTERS AND/OR ELECTION"

75%

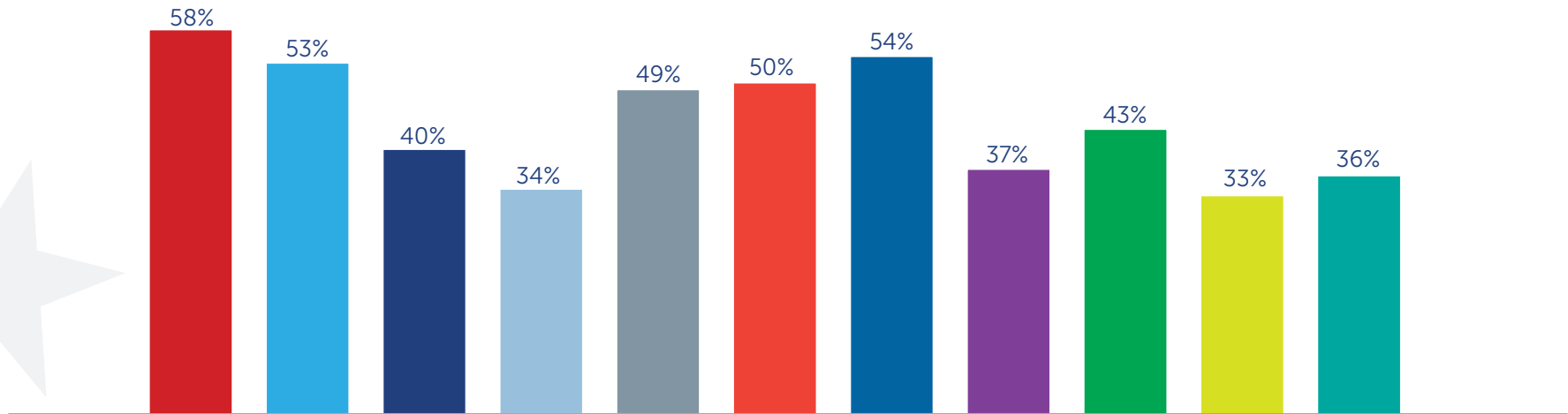


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q19.1: How much do you agree or disagree with the following statements? I am concerned about the influence fake news may have on voters/election. Q23: How much do you agree or disagree with the following statements? I am concerned by the amount of fake news on social media. Respondents who answered Agree or Strongly Agree. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

Conversely, TV Is The Most Trusted Media Source For Providing Undecided Voters With Accurate Political Information

More undecided voters rely on Television networks and their online properties over non-TV related news sites and social media because they know and trust the professional content these brands deliver

Which Source Do You Trust For The Most Accurate Political Information?



Undecided Voters

- TELEVISION
- TV NEWS WEBSITES/APPS
- NON-TV RELATED NEWS WEBSITES/APPS
- SOCIAL MEDIA
- SEARCH RESULTS
- ONLINE NEWSPAPERS
- NEWSPAPERS
- ONLINE RADIO/PODCASTS
- TERRESTRIAL RADIO
- EMAIL MARKETING
- DIRECT MAIL

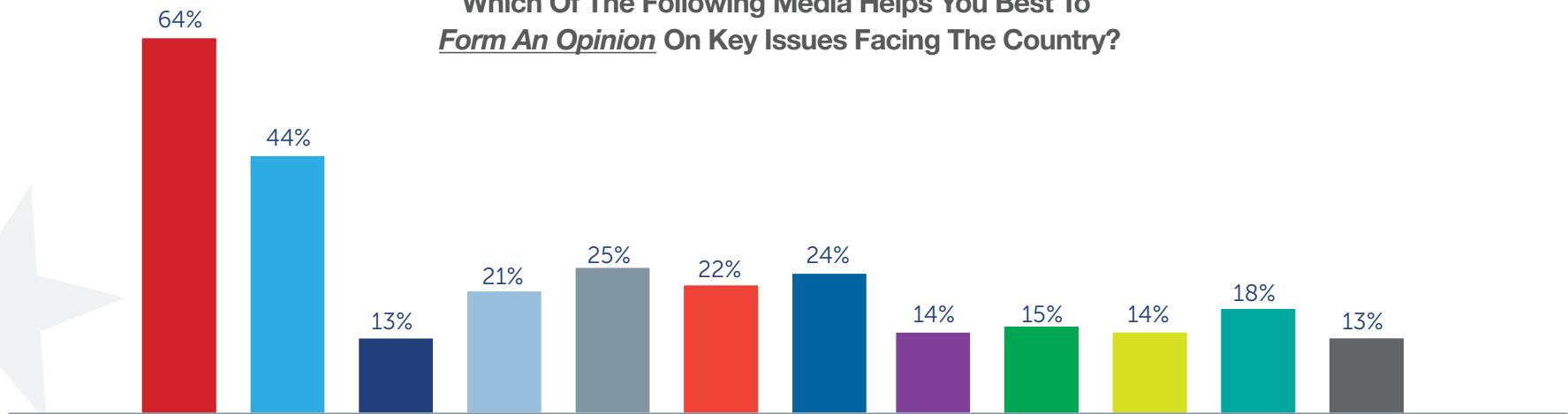
Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q22: There has been a lot of discussion recently about 'fake news'. Which source do you trust to provide the most accurate political information? Respondents who answered Agree or Strongly Agree. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

This Trust Has Established TV As The Primary Medium To Help Undecided Voters Form Their Opinion On Key Issues

TV's ability to disseminate accurate information at scale, and provide live personality-driven coverage through the continuous news cycle, has enabled TV brands to build trust with people across screens.

This trusted reporting helps people form their opinions, much more than any other media.

Which Of The Following Media Helps You Best To Form An Opinion On Key Issues Facing The Country?



Undecided Voters

- TELEVISION
- TV NEWS WEBSITES/APPS
- NON-TV RELATED NEWS WEBSITES/APPS
- SOCIAL MEDIA
- SEARCH RESULTS
- ONLINE NEWSPAPERS
- NEWSPAPERS
- ONLINE RADIO/PODCASTS
- TERRESTRIAL RADIO
- EMAIL MARKETING
- DIRECT MAIL
- BILLBOARDS

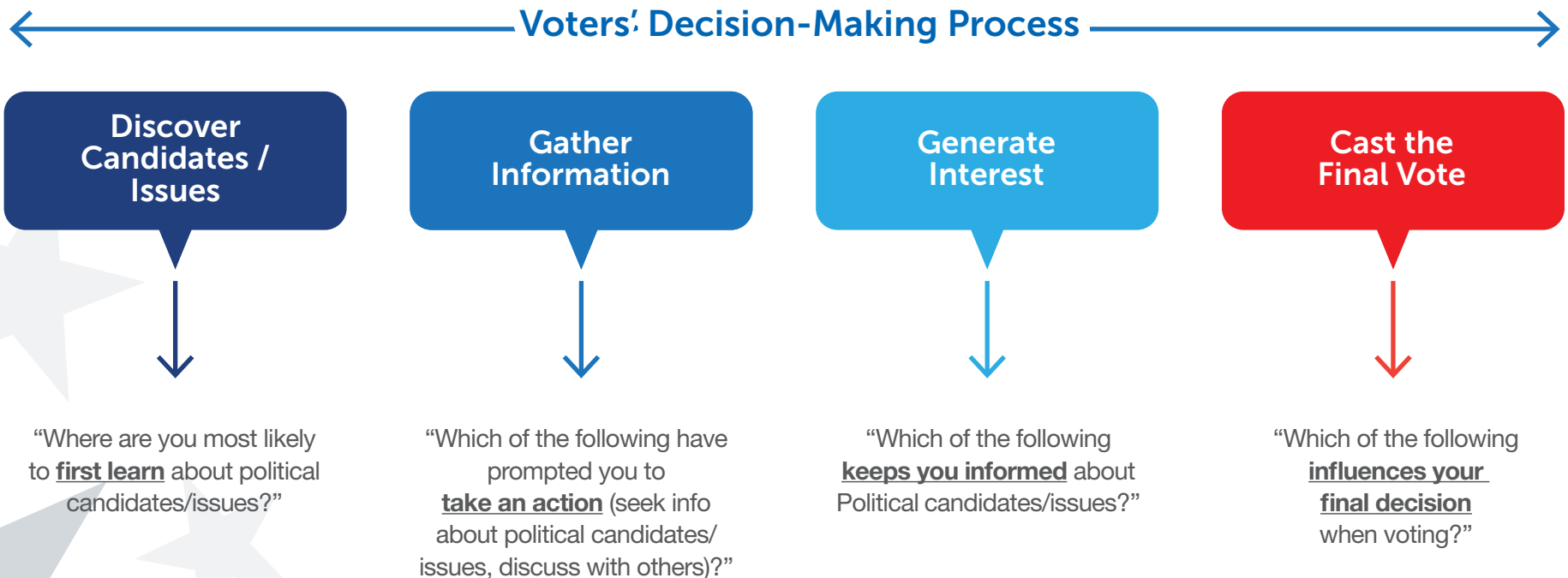
Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q21: Which of the following media helps you best to form an opinion on key issues facing the country, such as gun control, health care, economy, global warming, immigration, etc...? Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.



Trust In The Process: The Driving Force Behind Voter Decision Making

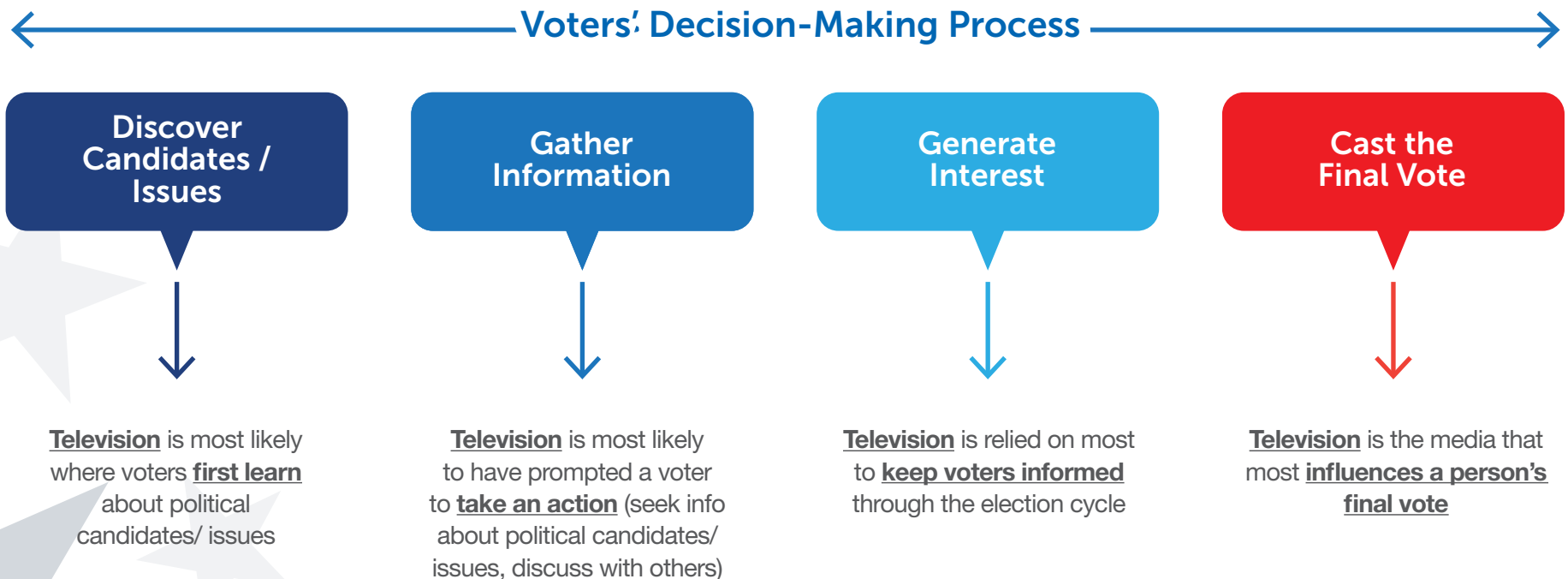
Trusted Media Can Influence Each Step In The Undecided Voter's Decision-Making Process Leading Up To Election Day

Voters, even undecided voters, have an on-going relationship with many different media platforms and these platforms, coupled with the never-ending news cycle, can help shape opinions long before a candidate even announces they are running for office



Much Like The Total Respondents, Undecided Voters Are Also Most Influenced By TV Brands Throughout The Election Cycle

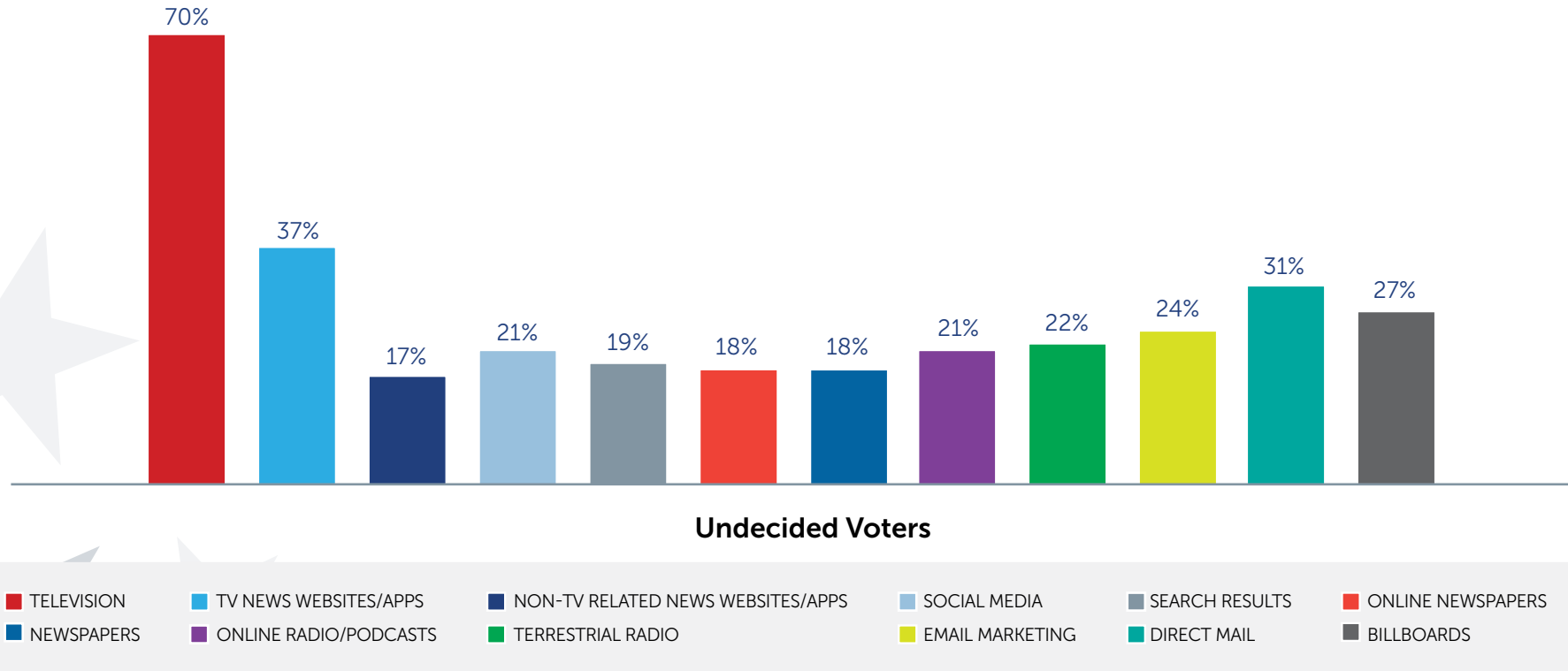
With each step of the decision making process, undecided voters prefer the trusted media of television, and TV brands on the whole, as their top political news source



The Trust That Exists With TV Brands Extends To Advertising As It's The Ad Platform Most Likely To Get Voters' Attention

Survey Fun Fact: 66% of undecided voters try to actively avoid online political ads on Facebook and YouTube

Which Of The Following Types Of Political Advertising Is Most Likely To Get Your Attention?

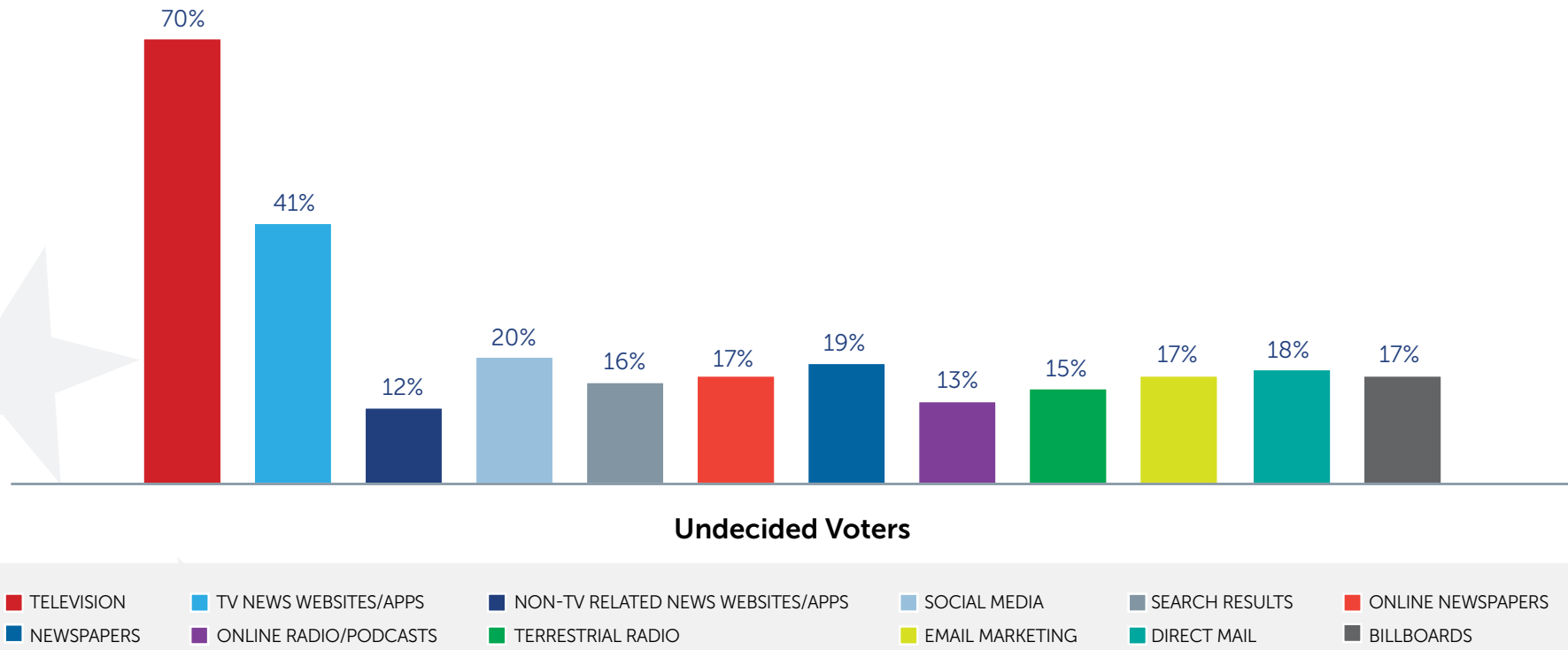


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q14: Which of the following types of political advertising is most likely to get your attention? Q23: How much do you agree or disagree with the following statements? I tend to skip, minimize the page/screen or turn off the sound when an online political ad plays on YouTube/Facebook. Respondents who answered Agree or Strongly Agree. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

Because Of This Attentiveness, It's No Surprise That TV Is How Most Undecided Voters First Learn About Candidates And Issues

Survey Fun Fact: Emails from political candidates aren't even opened by 59% of undecided voters

Where Are You Most Likely To First Learn About Political Candidates And Issues?

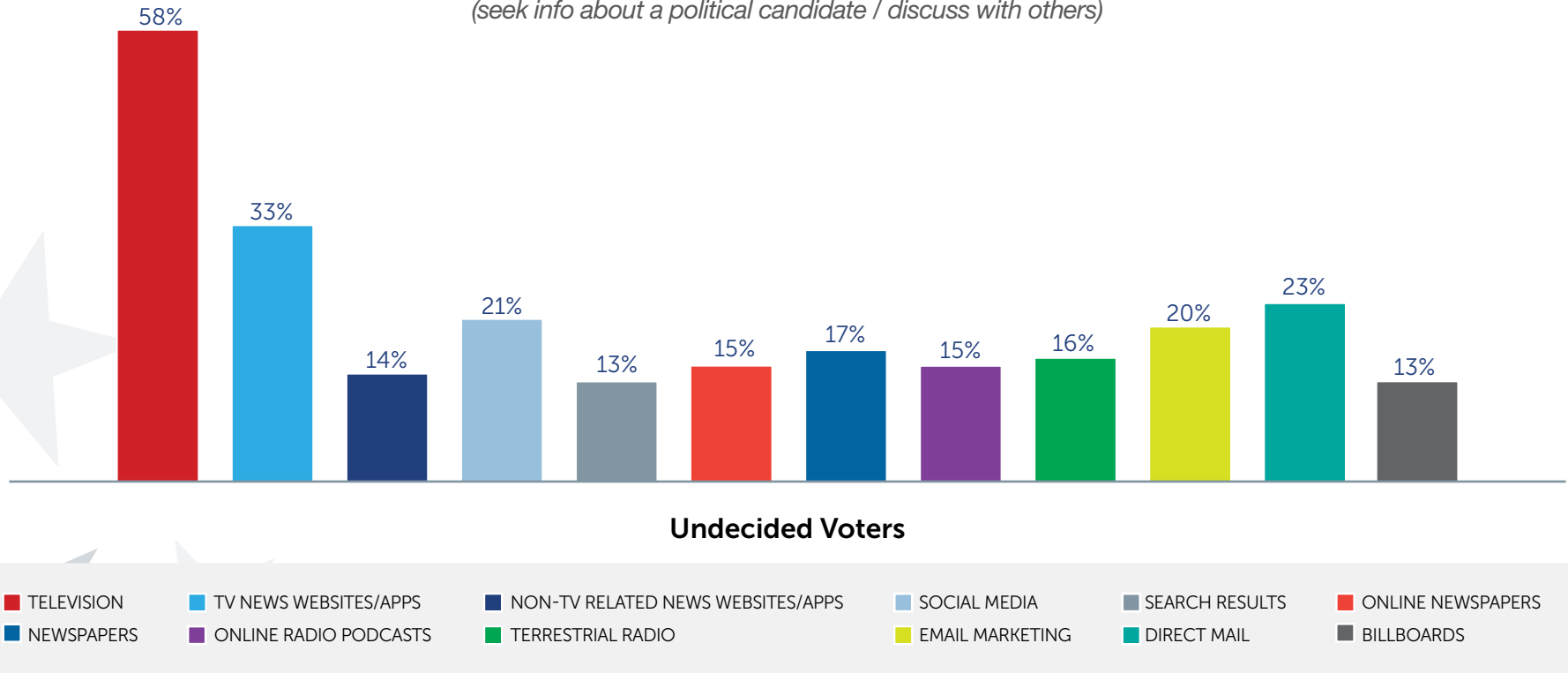


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q15: Where are you most likely to first learn about Political candidates and issues...? Q24: How much do you agree or disagree with the following statements? I delete emails from political candidates without opening them. Respondents who answered Agree or Strongly Agree. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

Political TV Ads Are Also Much More Likely Than Any Other Media Ads To Spur Undecided Voters To Take An Action After Seeing An Ad

Against undecided voters, TV ads are almost **3x** more likely than social media ads, and over **3.5x** more likely than radio ads, to prompt a voter to take an action

Which Of The Following Types Of Political Advertisements Have Prompted You To Take An Action?
(seek info about a political candidate / discuss with others)

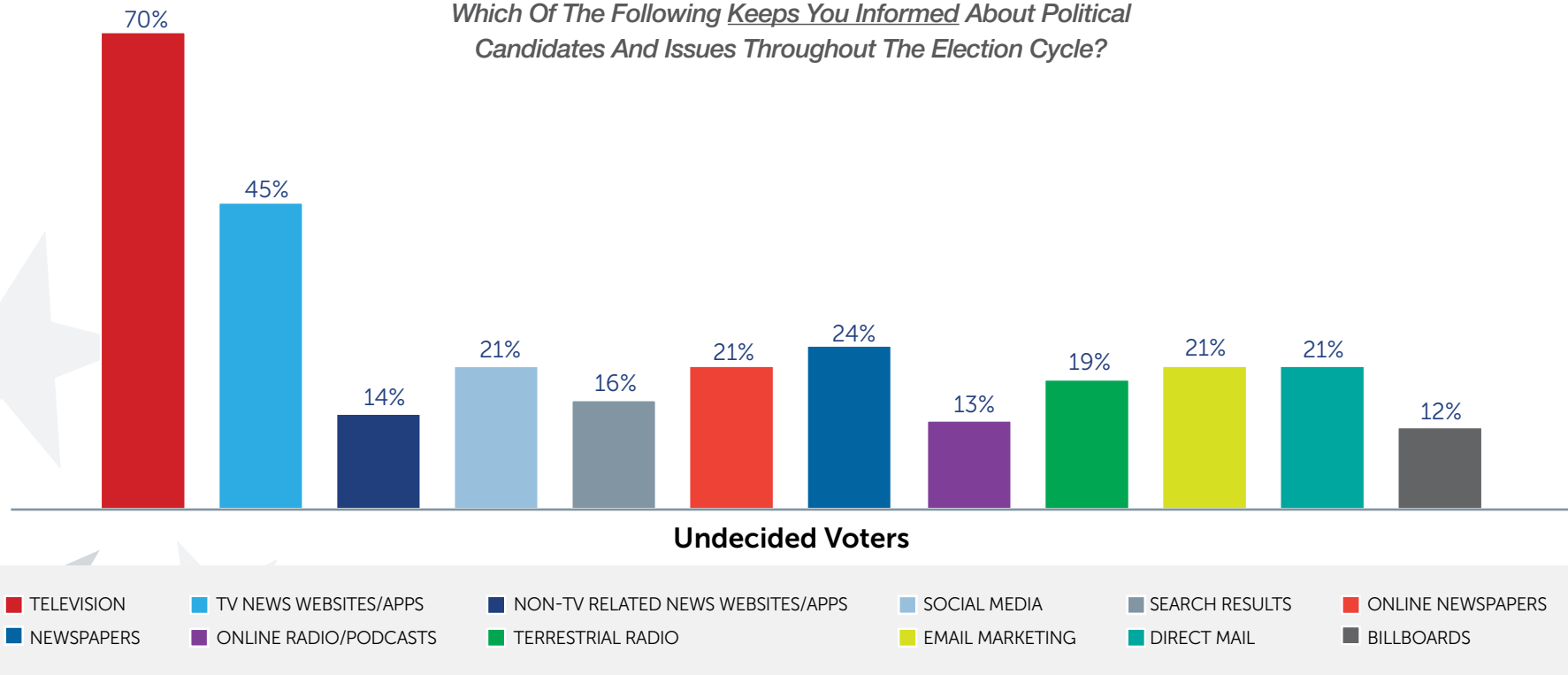


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q18: Which of the following types of political advertisements have prompted you to take an action (i.e. seek information about a political candidate/ issue, discuss with family/friends/co-workers)? Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

Due To On-Going Trust, Undecided Voters Are Likely To Rely On TV To Keep Them Informed Throughout The Election Cycle

Survey Fun Fact: 63% of undecided voters believe that Cable TV news websites and apps are a good source for political information

Which Of The Following Keeps You Informed About Political Candidates And Issues Throughout The Election Cycle?

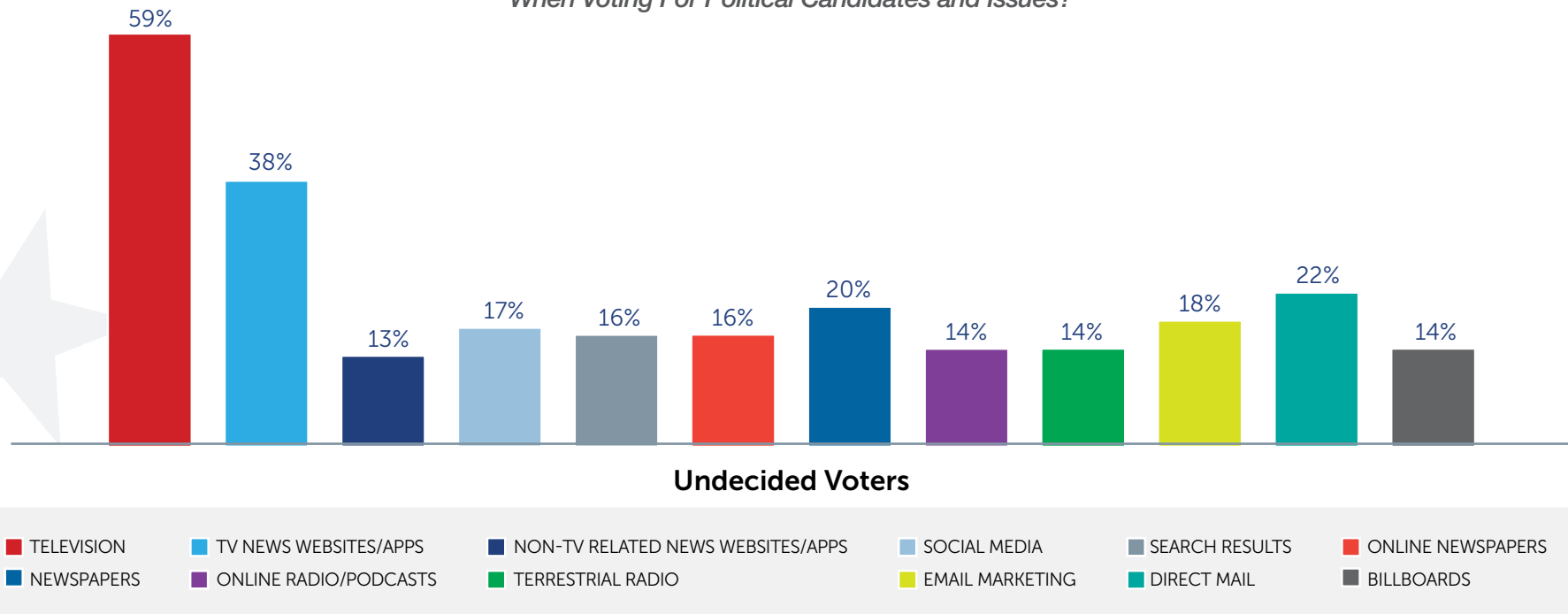


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q16: Which of the following keeps you informed about Political candidates and issues...? Q20: How much do you agree or disagree with the following statements? Cable TV news websites/apps (CNN.com, MSNBC.com, etc.) are a good source for political information. Respondents who answered Agree or Strongly Agree. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

Trust Translates Into Influence As Multi-Screen TV Is Much More Likely To Influence Voters' Final Decision Than Other Media

Survey Fun Fact: 59% of undecided voters feel that political ads on the radio all seem the same to them

Which Of The Following Influences Your Final Decision When Voting For Political Candidates and Issues?

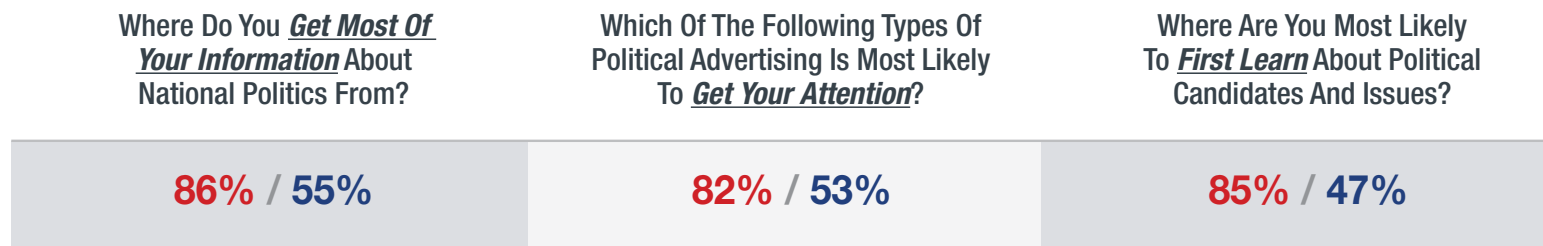


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q17: Which of the following influences your final decision when voting for political candidates and issues...? Q24: How much do you agree or disagree with the following statements? Political ads on the radio all seem the same to me. Respondents who answered Agree or Strongly Agree. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

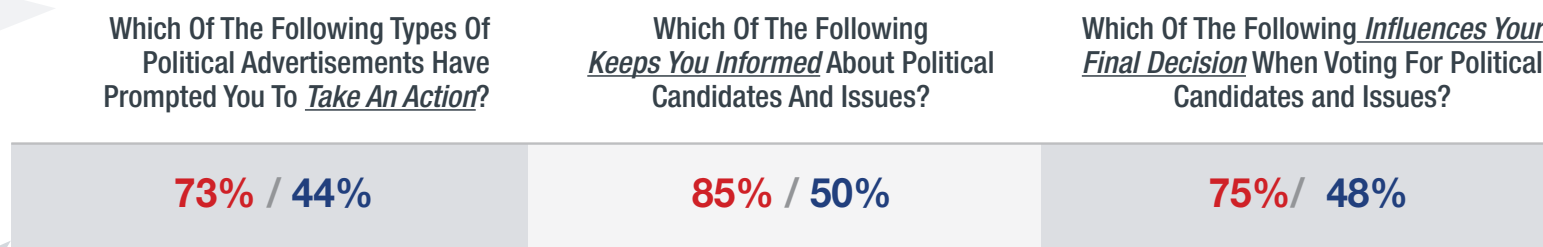
In Fact, Multi-Screen TV Has A Clear Scale Advantage Over All Online Platforms Throughout The Decision Making Process

Undecided voters rely on multi-screen TV early on and continue to turn to it more so than online platforms

Initial Stages of Decision Making Process



Advantages of Decision Making Process



■ Multi-Screen TV ■ Total Internet (excluding TV news sites)

Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Multi-Screen TV Figure (TV and TV News Websites/Apps); Total internet excluding TV-news websites (online radio/online newspapers/non-TV-related news websites/online search/social media). Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

And From A Community Perspective, Local Cable TV News Channels Are A Go-To Political Source For Undecided Voters

Survey Fun Fact: 61% of undecided voters say that local cable TV news channels are a good source of political information

Community, Quality, Character & Concise Coverage are the hallmarks of local cable news

	<u>Undecided Voters</u> % Who Agree
Local Cable provides an informative local perspective on national issues	63%
Local Cable provides extensive news coverage and political information	61%
I rely upon local cable news to cover local issues that affect my community	60%
Local Cable has quality news programs	56%
I watch more Local Cable news now than in the past	49%

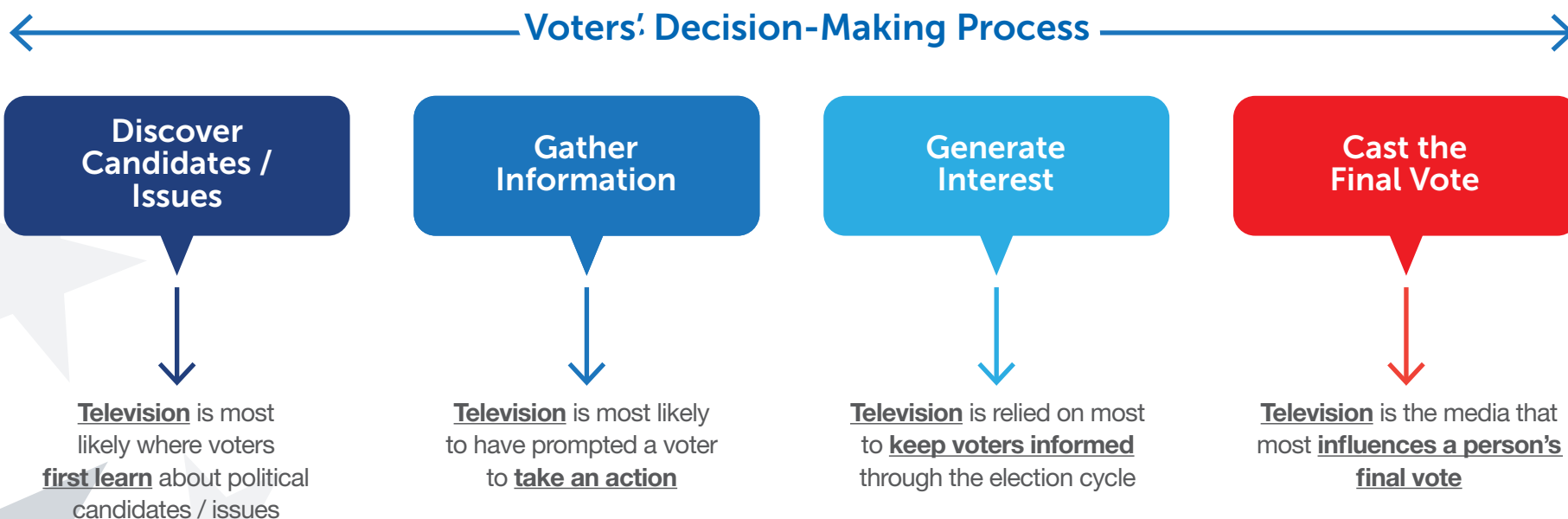
Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q27: Thinking about Local Cable News, please rate the following statements (Respondents who answered Agree or Strongly Agree). Q23: How much do you agree or disagree with the following statements? Local cable TV news channels are a good source for political information. Respondents who answered Agree or Strongly Agree. Undecided voters = voters that are currently undecided on who they are going to vote for and who expect to make their decision one week or less before the election. Undecided Voter Respondents = 243. Total Survey Respondents: 1,003.

Closing Remarks

Much as we saw with total respondents in our first report - *It's A Matter Of Trust: Media's Influence On Voters*; even though politics has the ability to divide the country, the desire for trustworthy and accurate news sources is what unites voters, even the undecided voters.

As some platforms unintentionally allow the dissemination of unverified news stories and political ads, Television is trusted because it provides an environment that features 100% professionally produced news.

This is why television is the most influential media throughout the election cycle and candidates that effectively use the platform can win over the undecided voter.



The combined power of multi-screen TV further strengthens the influence that TV brands have among voters of all ages, genders, demographics, occupations and political party affiliations; while local cable news delivers extensive and authentic news and political coverage from a local community perspective.

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Sean Cunningham
President & CEO
212-508-1223
seanc@thevab.com

Danielle DeLauro
Executive Vice President
212-508-1239
danielled@thevab.com

Jason Wiese
SVP, Director of Strategic Insights
212-508-1219
jasonw@thevab.com

Marianne Vita
VP Strategic Insights
212-508-1211
mariannev@thevab.com

Evelyn Skurkovich
VP Strategic Research & Insights
212-508-1220
evelyns@thevab.com

Lauren Leff
VP Marketing & Communications
212-508-1222
laurenl@thevab.com