

IT'S A MATTER OF TRUST

Media's Influence On Voters



| | |
|-------------------------------------------------------------------------|-------|
| 1. Our Platform | 3 |
| 2. Methodology | 4 |
| 3. Who Are The Survey Respondents? | 5-9 |
| 4. Today's Hot Button Issue: "Fake News" And Who Can You Trust? | 10-18 |
| 5. Trust In The Process: The Driving Force Behind Voter Decision-Making | 19-31 |
| 6. The Influence Advantage: Multi-Screen TV vs. Total Online Platforms | 32-36 |
| 7. Local Cable News: A Leader In The Community | 37-39 |
| 8. Final Thoughts | 40 |
| 9. Contact Information | 41 |

Our Platform

One of the biggest cultural catchphrases to emerge during the last election cycle was “Fake News.” This oft-used phrase has continued to permeate every corner of American society over the last two years. The concept has been even further amplified by recent scandals on some media platforms involving foreign meddling through unverified content sharing and targeted advertising as well as the unintentional sharing of user data with more than dubious partners.

While politics is usually thought of as the “great divide,” voters of all ages, genders, ethnicities, occupations and political affiliation agree that what matters most is having a form of media that they can trust, media that disseminates accurate information, so that they can make informed decisions on political candidates and key issues facing the country.

In fact, trusted media is able to create a bond with voters which, in turn, helps guide them in their decision-making process throughout the election cycle. As we get closer to election day, there’s no doubt that “fake news” will continue to be disseminated in one form or another. So, who do voters trust?

With its around-the-clock, 100% professionally produced content and controlled practices for news reporting, it’s no surprise that multi-screen TV brands are the most trusted source for almost all segments. The trust voters have with TV brands to deliver the most accurate political information heightens their attentiveness level and makes it the most influential platform throughout the election process – from initial discovery of candidates and information gathering to the casting of their final vote.

Methodology

The VAB commissioned Research Now to conduct the **2018 Mid-Term Election Survey** fielded between May-June 2018. The information is based on 1,000 respondents from a randomly selected national internet panel whose demographics are representative to the U.S. Census.

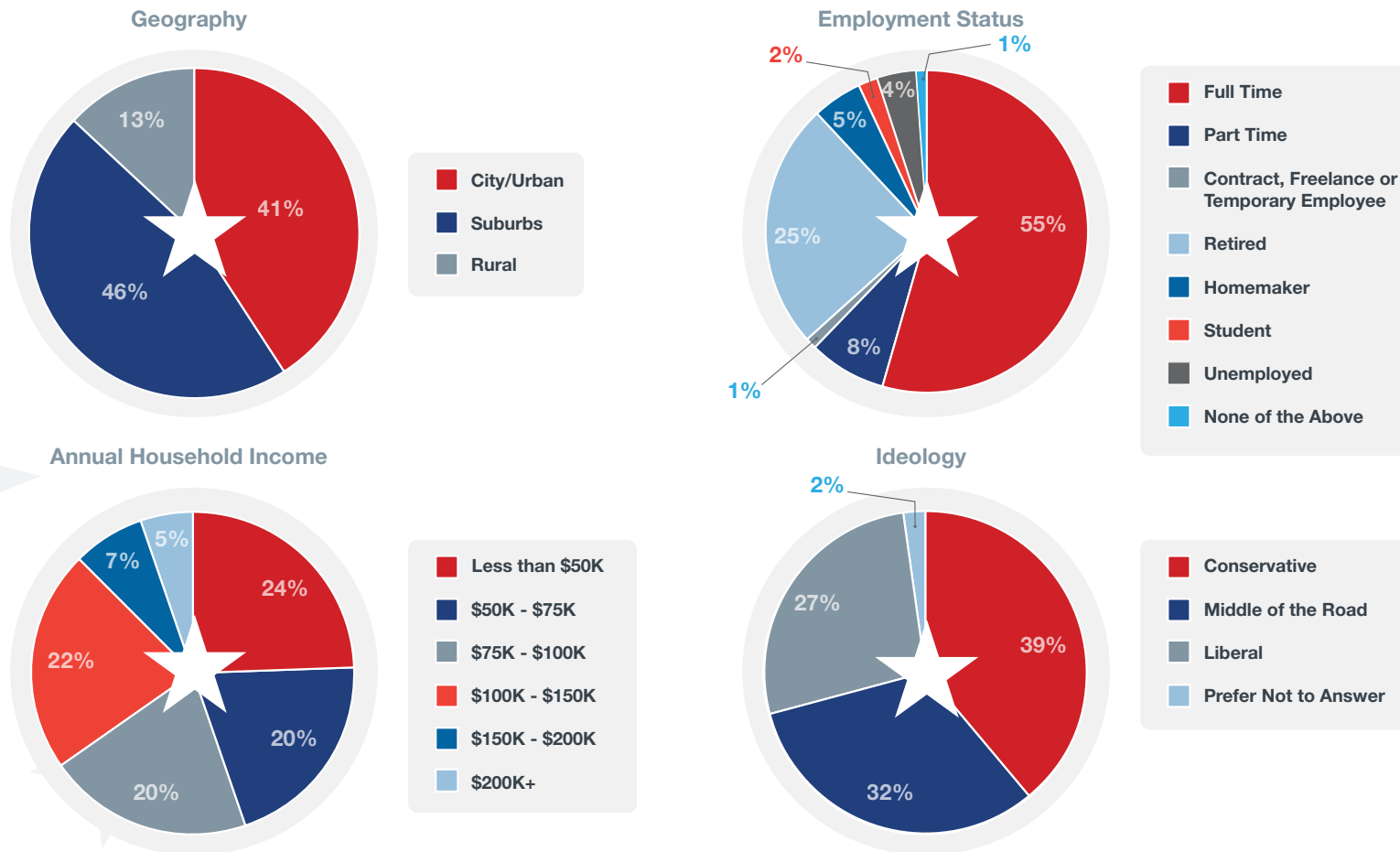
Our mission was to better understand the effect of “fake news” and trust among voters as well as the power that media and advertising have in a voter’s decision-making process throughout the election cycle.

This poll of registered adult 18+ voters or people that plan on voting in the 2018 mid-term local elections takes an in-depth look at how 12 different media platforms influence key voting constituents such as *age, gender, ethnicity, occupation and political party affiliation*.

Who Are The Survey Respondents?




Survey Respondents Represent A Mix Of Geographies, Employment Status, Incomes & Ideologies

General demographics like age, gender, and ethnicity closely align with the U.S. Census



Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Total Respondents=1,003.

Respondents Represent A Proportionate Blend Of Political Affiliations

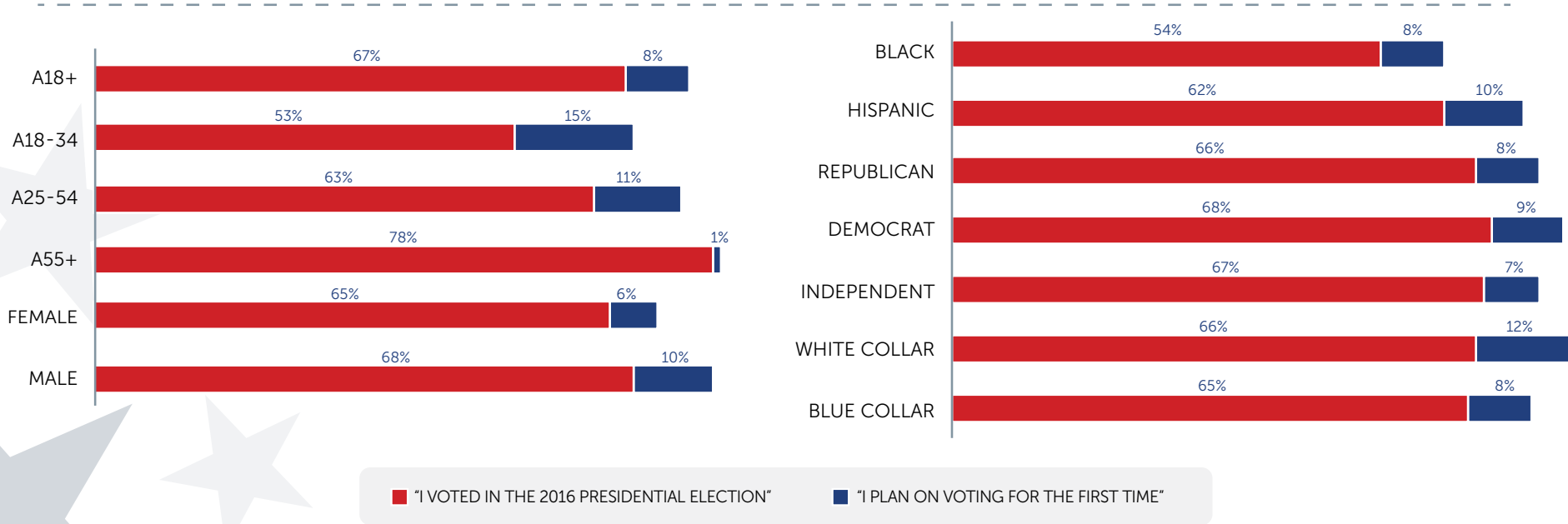
| | A18+ | A18-34 | A25-54 | A55+ | Black | Hispanic | Female | Male | White Collar | Blue Collar |
|---------------------------------------------------------------------------------------------------------|------|--------|--------|------|-------|----------|--------|------|--------------|-------------|
|  Republican | 33% | 31% | 32% | 36% | 9% | 23% | 31% | 35% | 33% | 30% |
|  Democrat | 44% | 46% | 46% | 39% | 69% | 56% | 48% | 39% | 43% | 50% |
|  Independent / Other | 23% | 23% | 23% | 25% | 22% | 21% | 21% | 26% | 24% | 20% |

Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q10: What political affiliation would you say you are most closely affiliated with? Total Respondents=1,003.

Most Are Experienced Voters Since A Majority Also Voted In The 2016 Presidential Election

"I VOTED IN THE 2016 PRESIDENTIAL ELECTION"

"I PLAN ON VOTING FOR THE FIRST TIME"

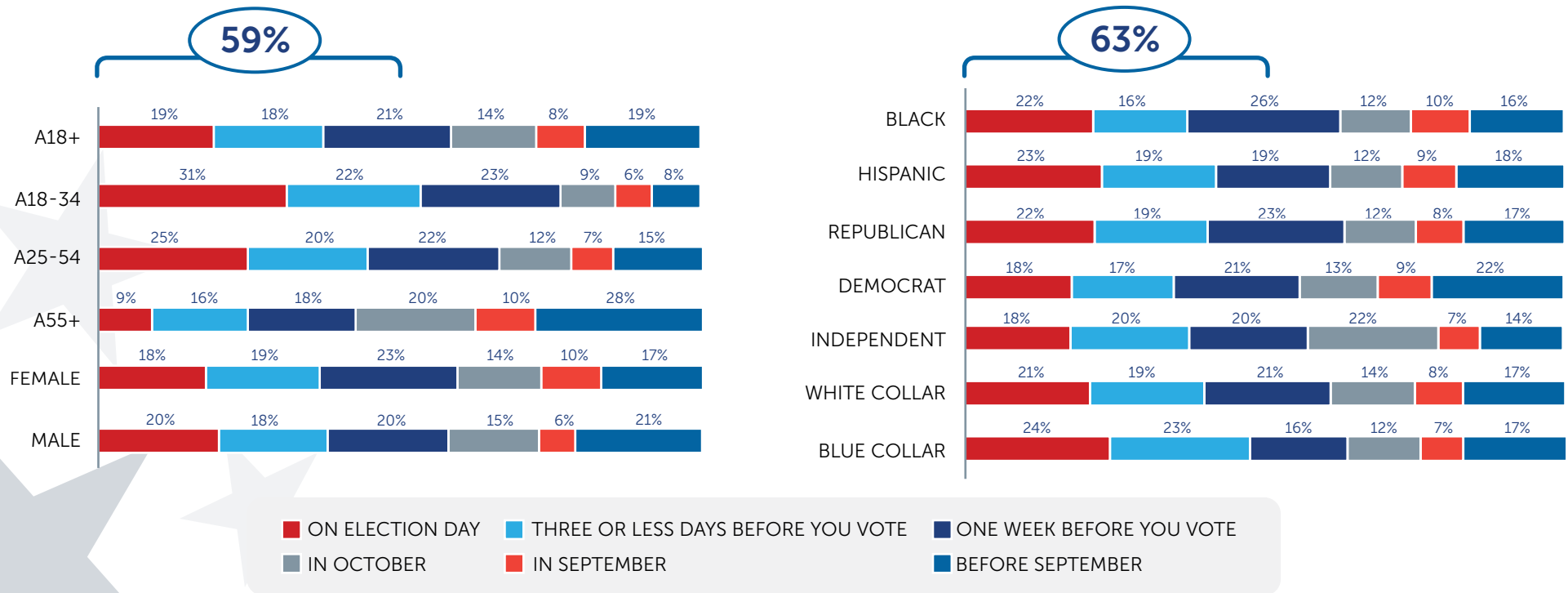


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q13: Which of the following statements are true for you? Total Respondents=1,003.

Even Though They're Experienced Voters Most Still Make Their Final Voting Decision Less Than A Week Before An Election

76% of adults 18-34 don't make their final decision until the week leading up to the election

When Do You Typically Make Your Final Decision Regarding Who You Are Going To Vote For In November's Mid-term/Local Elections?



Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. 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 Respondents=1,003.

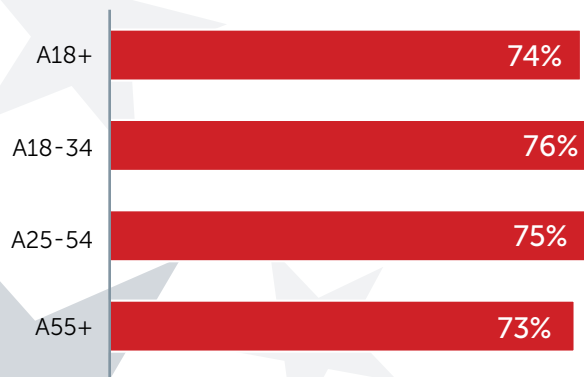
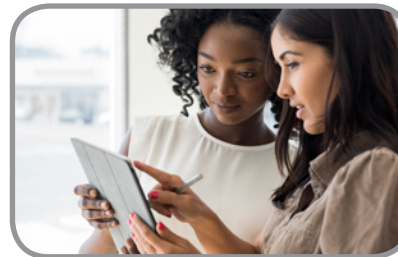


Today's Hot Button Issue: "Fake News" And Who Can You Trust?

Voters Of All Demographics Are Deeply Concerned Over The Influence That "Fake News" May Have On Elections

"I Am Concerned About The Influence Fake News May Have On Voters and/or Elections"

% Who Agree



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. Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

The Issue Of "Fake News" Transcends Party Lines As The Concern Is Pervasive Among Both Republicans & Democrats

"I Am Concerned About The Influence Fake News May Have On Voters and/or Elections"

% Who Agree

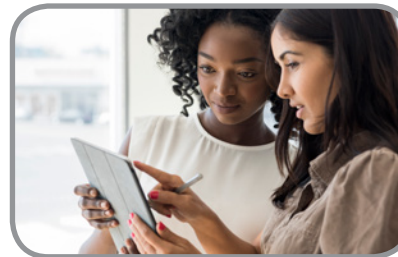


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q19.1: How much do you agree or disagree with the following statements? I am concerned about the influence fake news may have on voters/election. Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

Social Media, Which Is Often Unregulated And Unhinged, Remains Especially Problematic When It Comes To "Fake News"

*"I Am Concerned By The Amount Of Fake News On **Social Media**"*

% Who Agree



Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. 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. Total Respondents=1,003.

All Sides Are Very Concerned With The Role That Social Media Plays In The Dissemination Of "Fake News"

*"I Am Concerned By The Amount Of Fake News On **Social Media**"*

% Who Agree

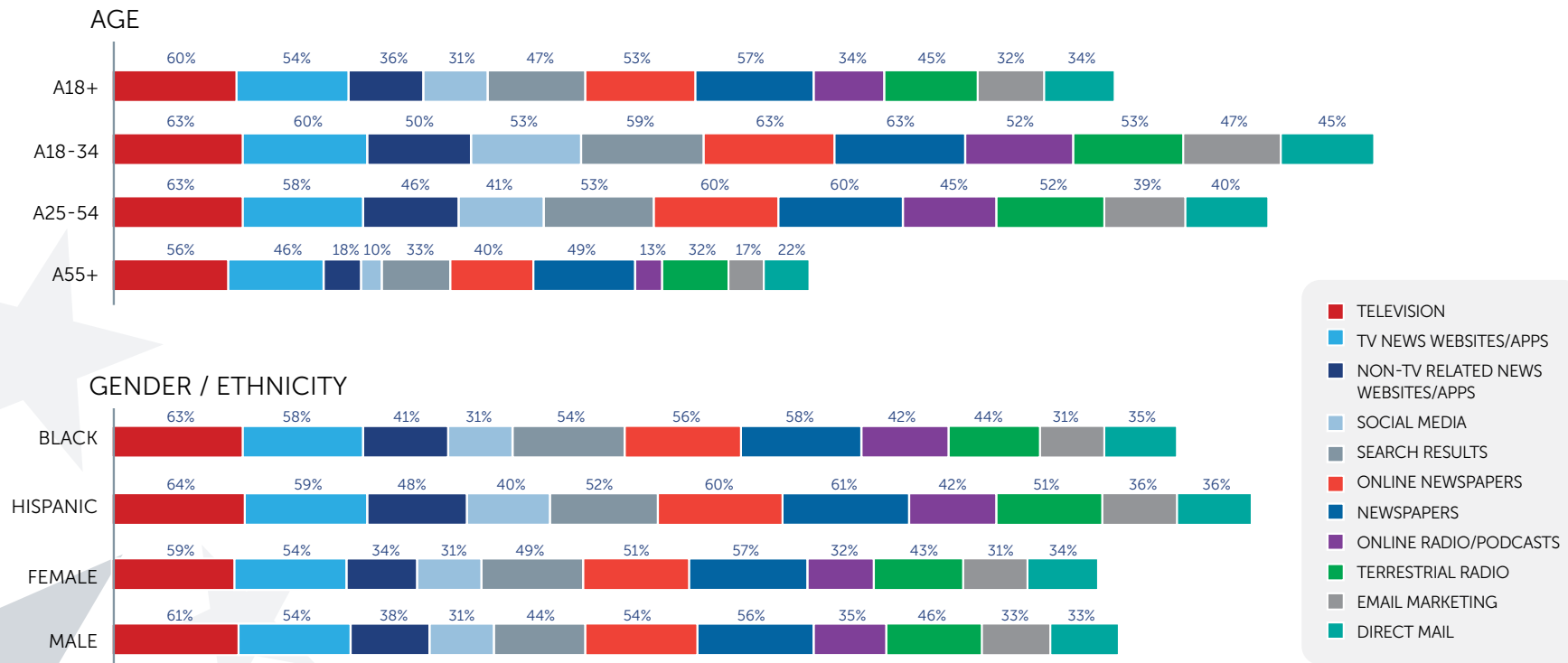


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q23: How much do you agree or disagree with the following statements? I am concerned by the amount of fake news on social media. Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

TV Is The Most Trusted Source For Providing Accurate Political Information & Far More Trustworthy Than Social Media Or Radio

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

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

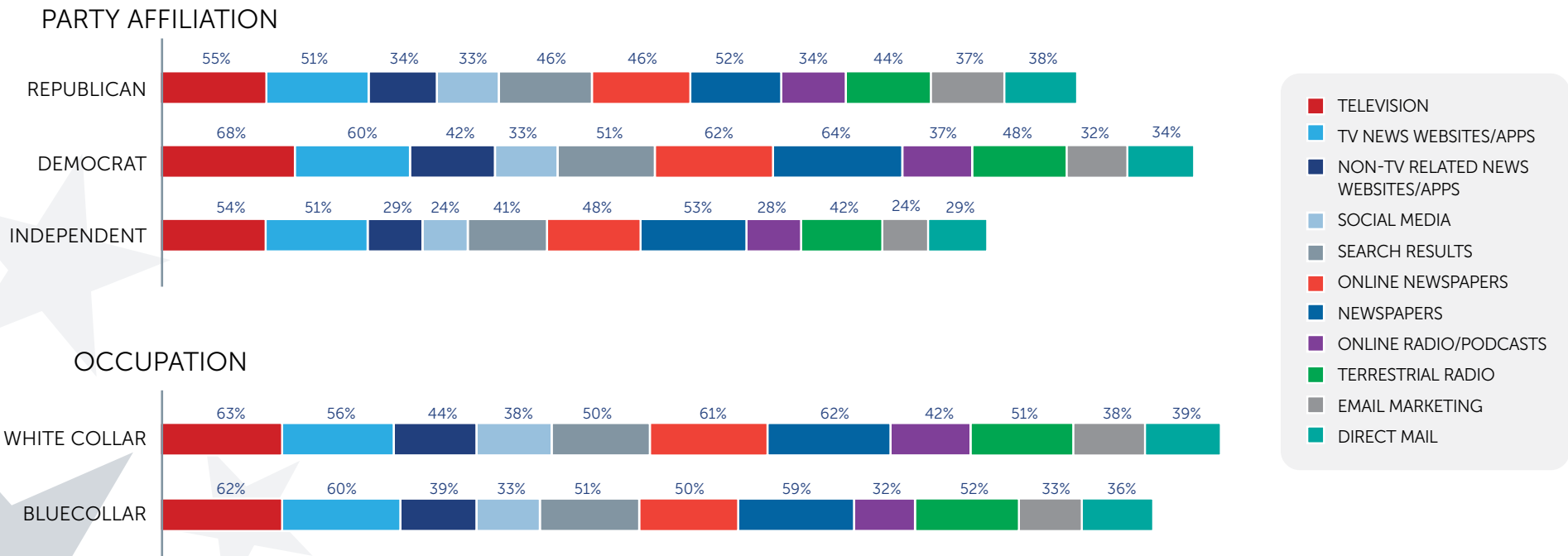


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q22: There has been a lot of discussion recently about 'fake news'. Which source do you trust to provide the most accurate political information? Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

TV Is Also The Most Trusted Source For Information Across Party Affiliation As Well As Both Blue And White Collars

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

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

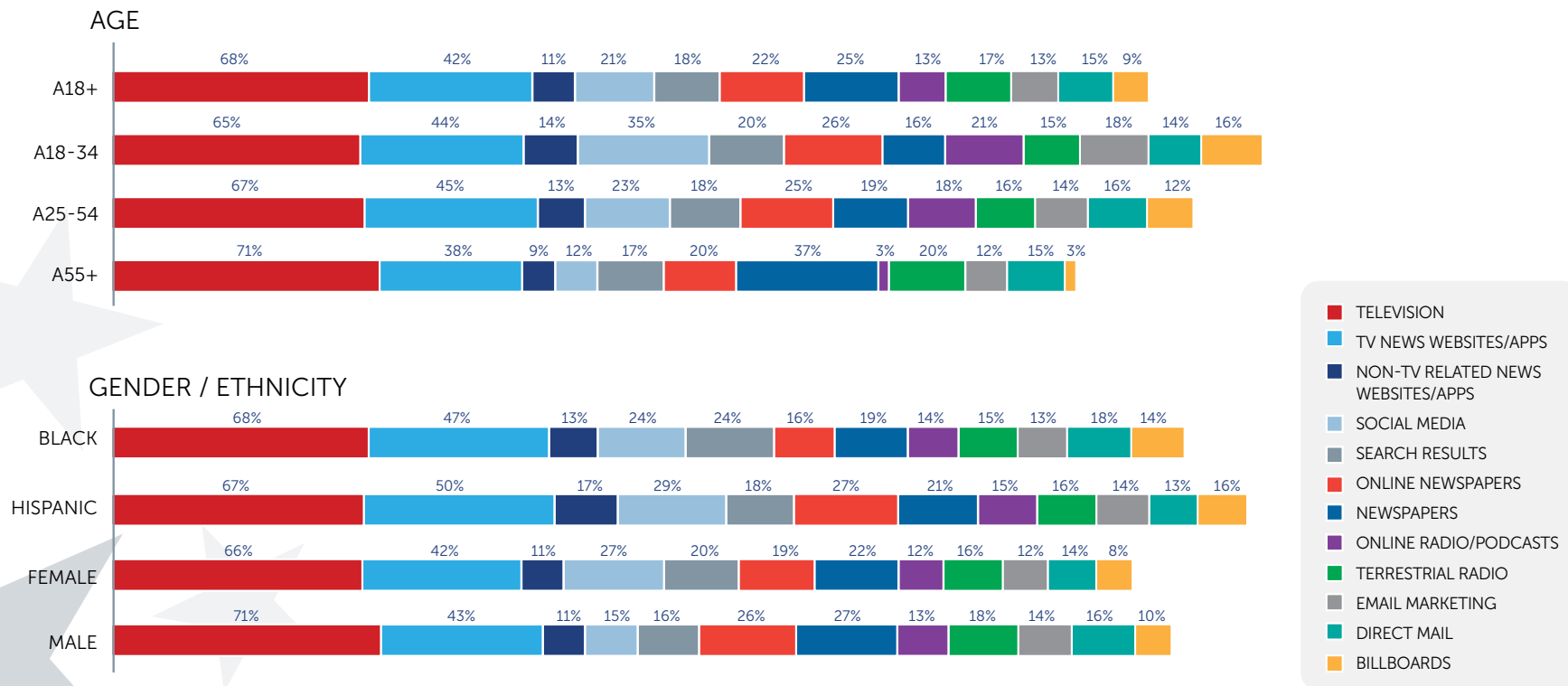


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This Trust Has Established TV As The Main Medium That Most People Rely On To Help Them Form Their Opinion On Key Issues

Television's ability to disseminate accurate information has enabled TV brands to build trust with people across screens. This information helps people to form their opinions on key issues, much more than any other media.

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

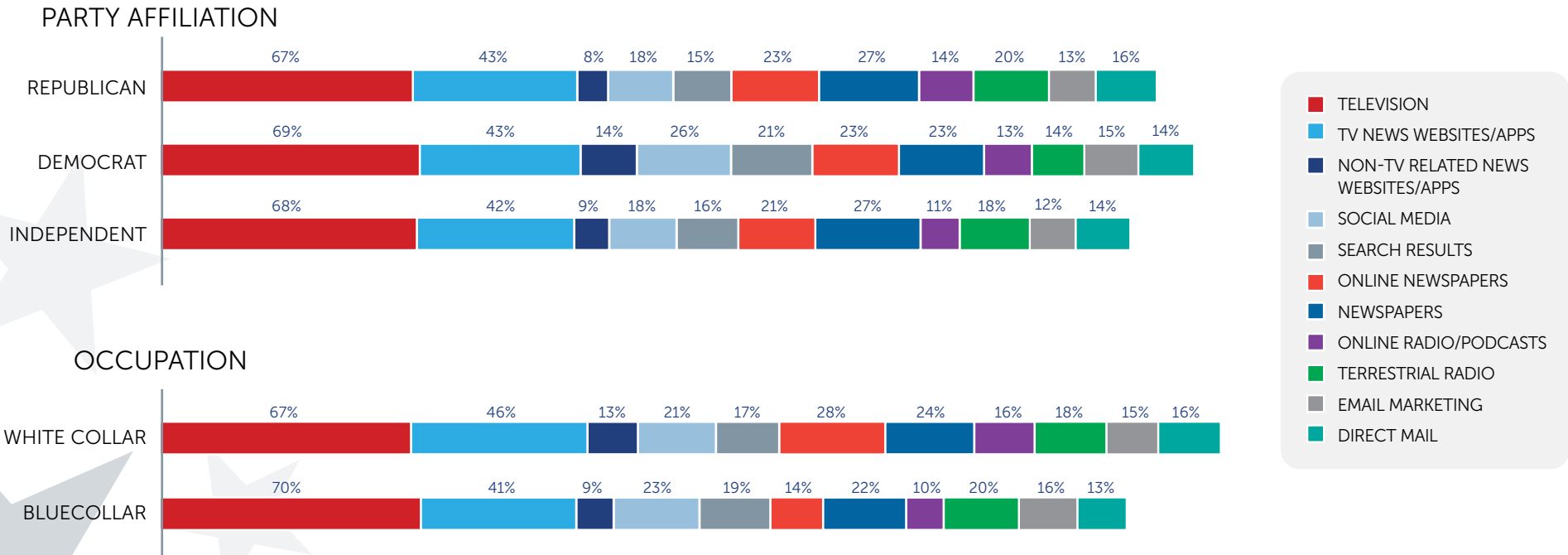


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q21: Which of the following media helps you best to form an opinion on key issues facing the country, such as gun control, health care, economy, global warming, immigration, etc...? Total Respondents=1,003.

A Majority Of Democrats & Republicans, Blue & White Collars, All Turn To TV For Help In Forming Their Opinion On Key Issues

Multiscreen TV's (TV + online) percentages are virtually the same across party affiliations and occupations and no other media comes anywhere close to their level of influence

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

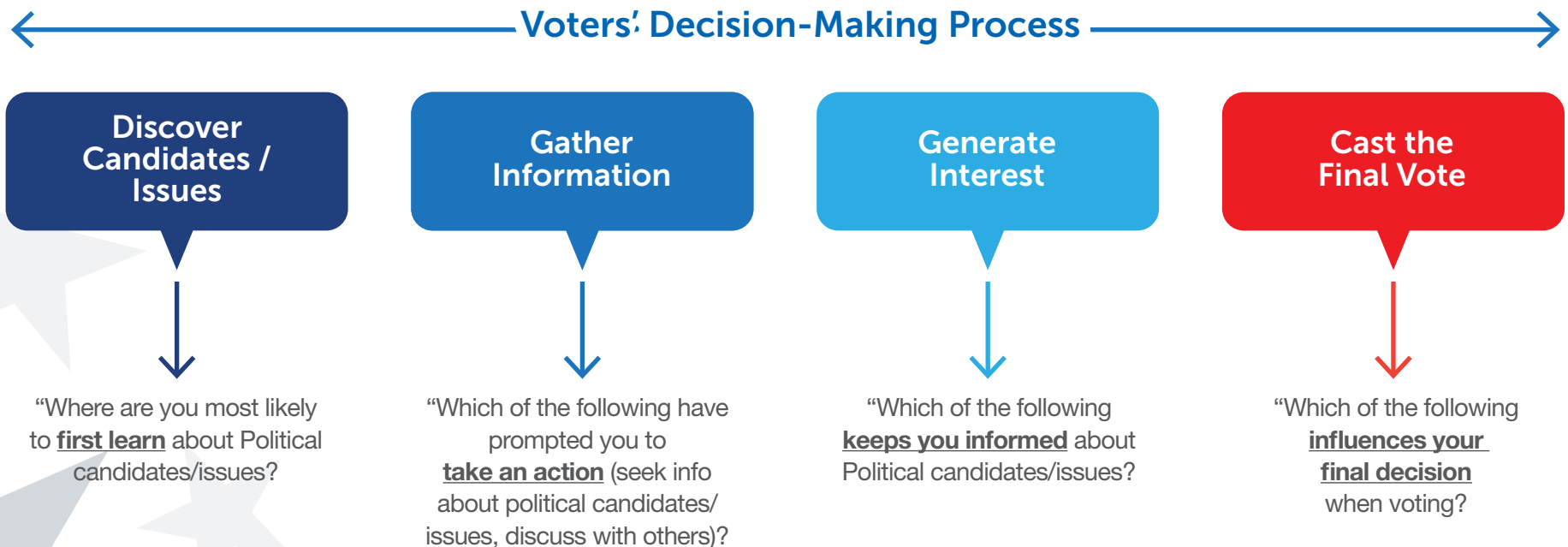


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q21: Which of the following media helps you best to form an opinion on key issues facing the country, such as gun control, health care, economy, global warming, immigration, etc...? Total Respondents=1,003.

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

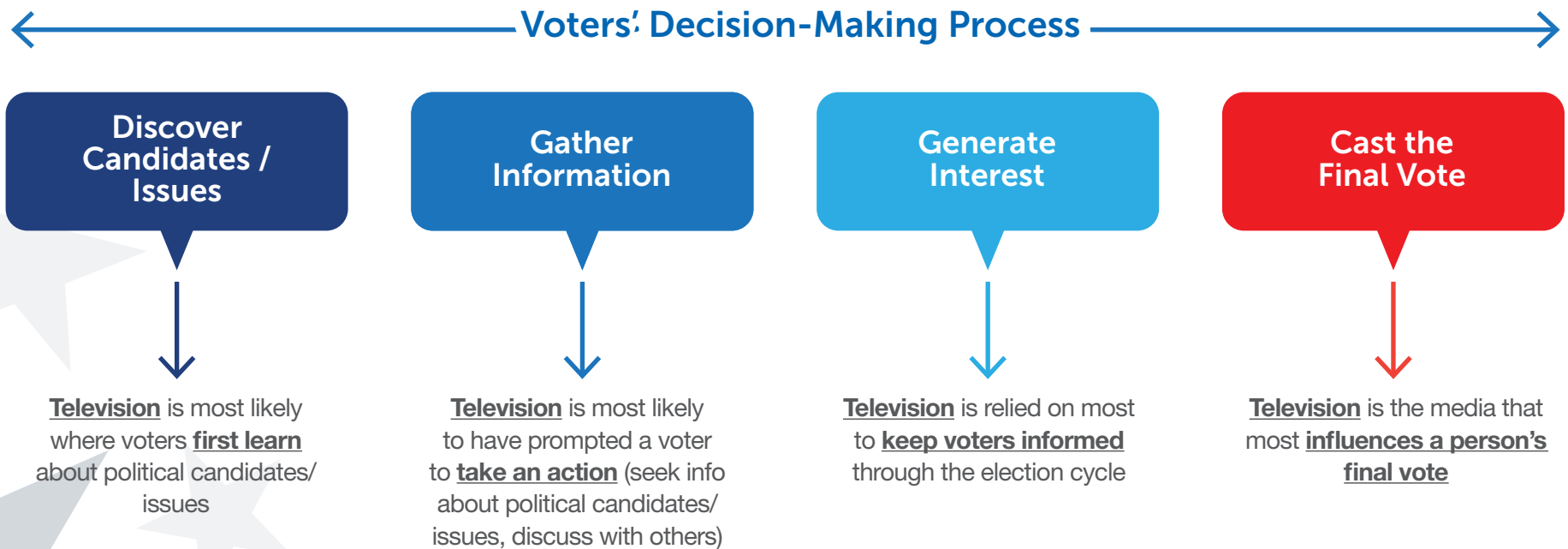
Trusted Media Can Influence Each Step In A Voter's Decision Making Process Leading Up To Election Day

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



Regardless Of Demographic, Affiliation Or Occupation, Voters Are Most Influenced By TV Brands Throughout The Election Cycle

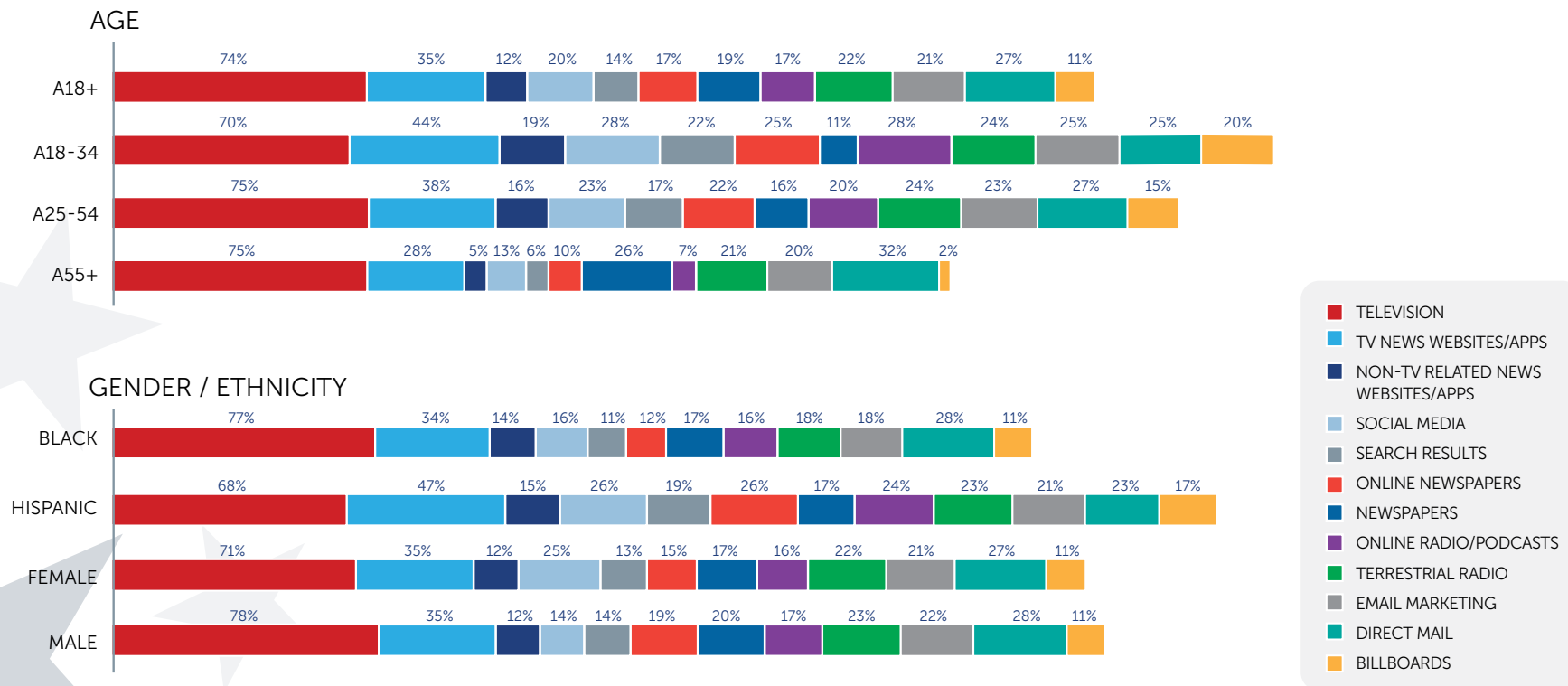
With each step of the decision-making process, voters prefer the trusted media of Television, and TV Brands on the whole, as their top political news source



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: 61% of Adults 18+ and 65% of adults 18-34 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?

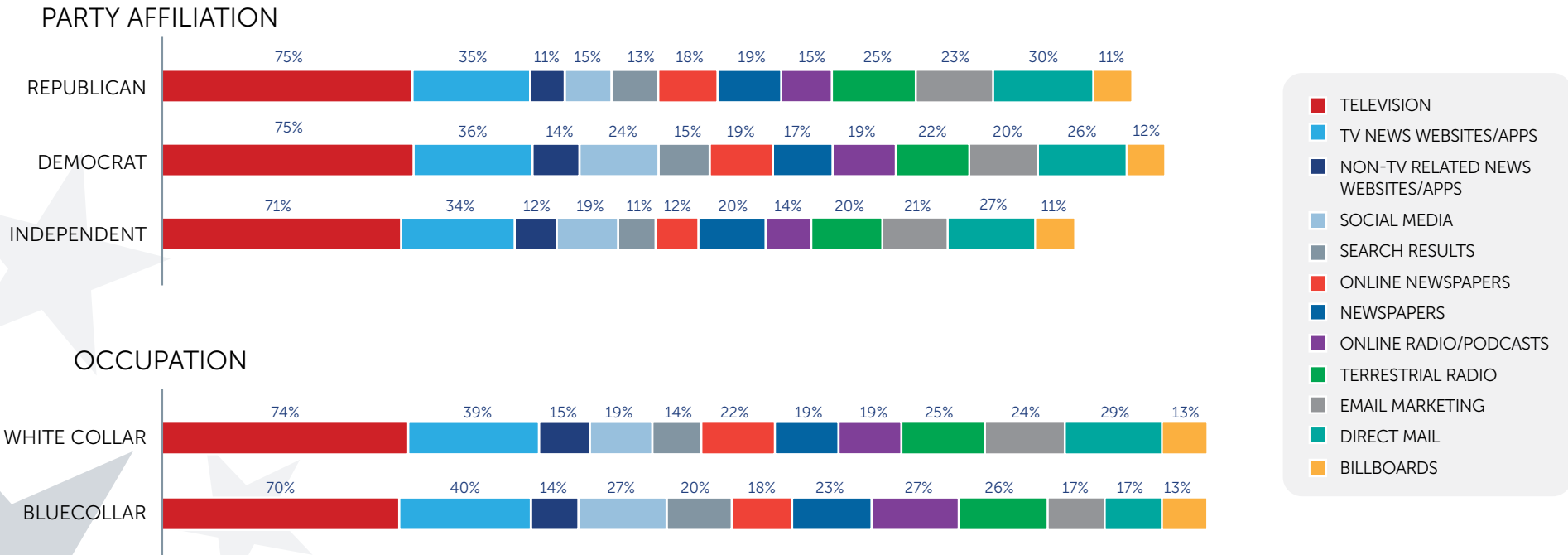


Source: Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q14: Which of the following types of political advertising is most likely to get your attention? Q23: How much do you agree or disagree with the following 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. Total Respondents=1,003.

75% of Democrats & Republicans Say That Political Advertising On TV Is The Media Most Likely To Get Their Attention

Survey Fun Fact: 64% of Independents and 67% of white collars 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?

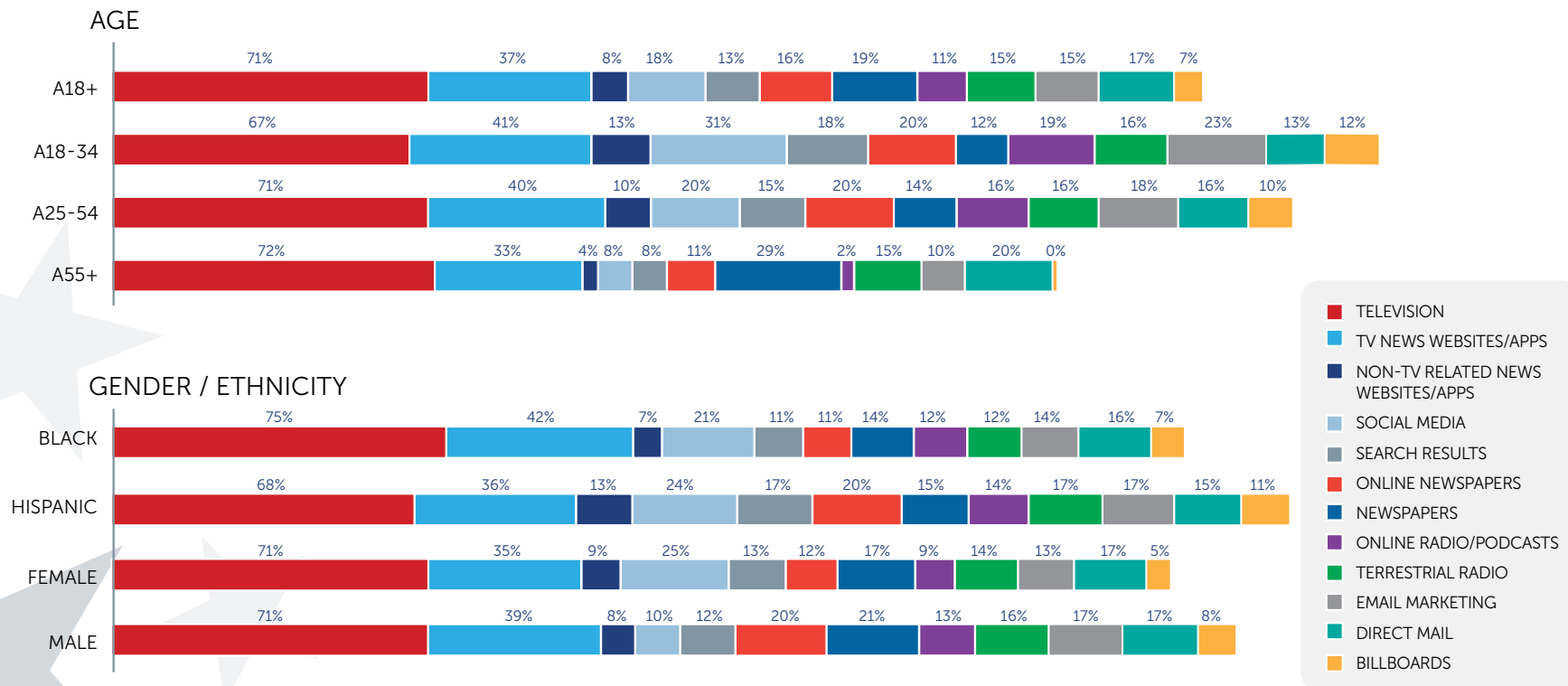


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Because Of This Attentiveness, It's No Surprise That TV Is How Most Voters Are Likely To First Learn About Candidates And Issues

Survey Fun Fact: Emails from political candidates aren't even opened by 56% of adults 18+ and 61% of adults 18-34

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

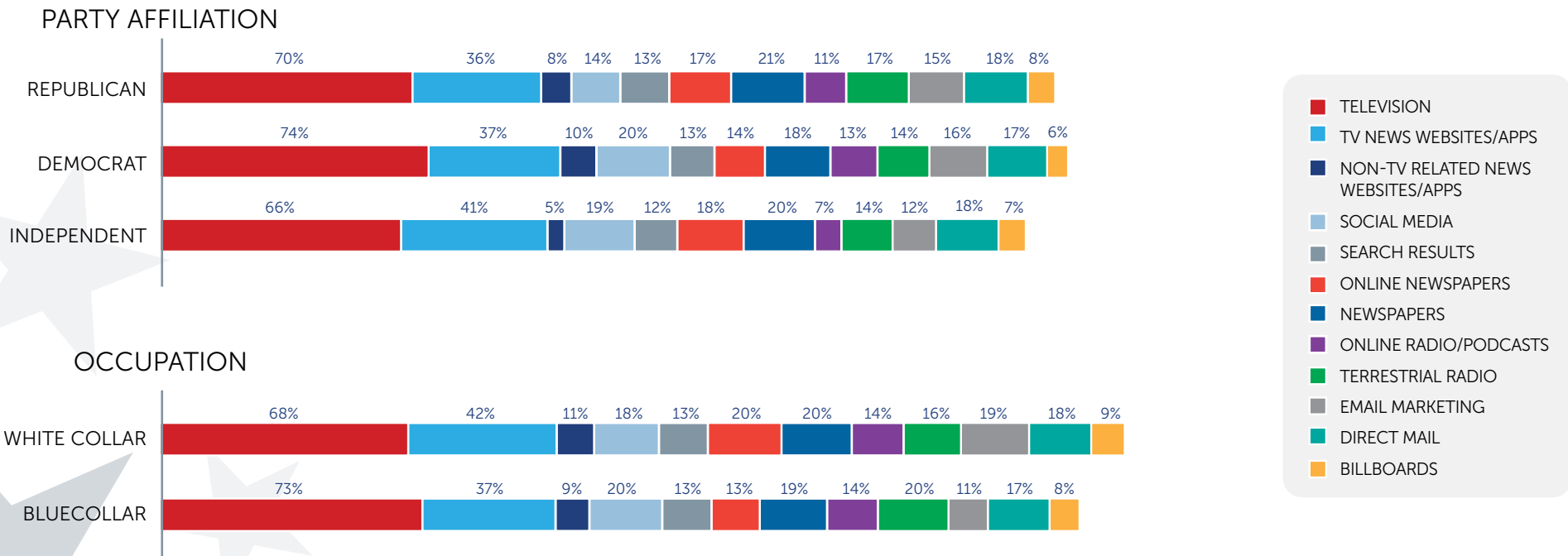


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q15: Where are you most likely to first learn about Political candidates and issues...? Q24: How much do you agree or disagree with the following statements? I delete emails from political candidates without opening them. Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

Over 70% of Democrats & Republicans Are Most Likely To First Learn About Candidates And Issues From TV

Survey Fun Fact: Emails from political candidates aren't even opened by 60% of Independents and 59% of white collars

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

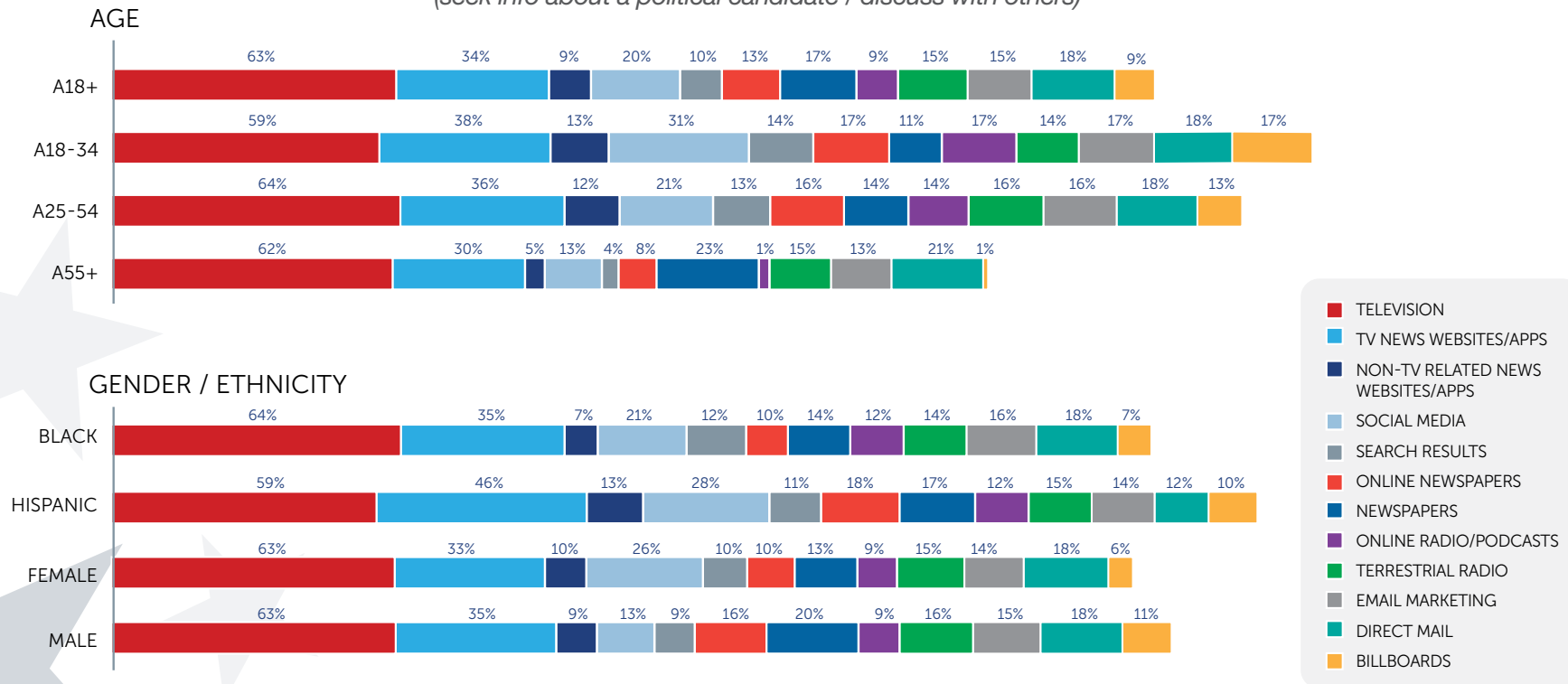


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Political TV Ads Are Also Much More Likely Than Any Other Media To Spur Voters To Take An Action After Seeing An Ad

Against adults 18+, TV ads are **3x** more likely than social media, and **4x** 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)

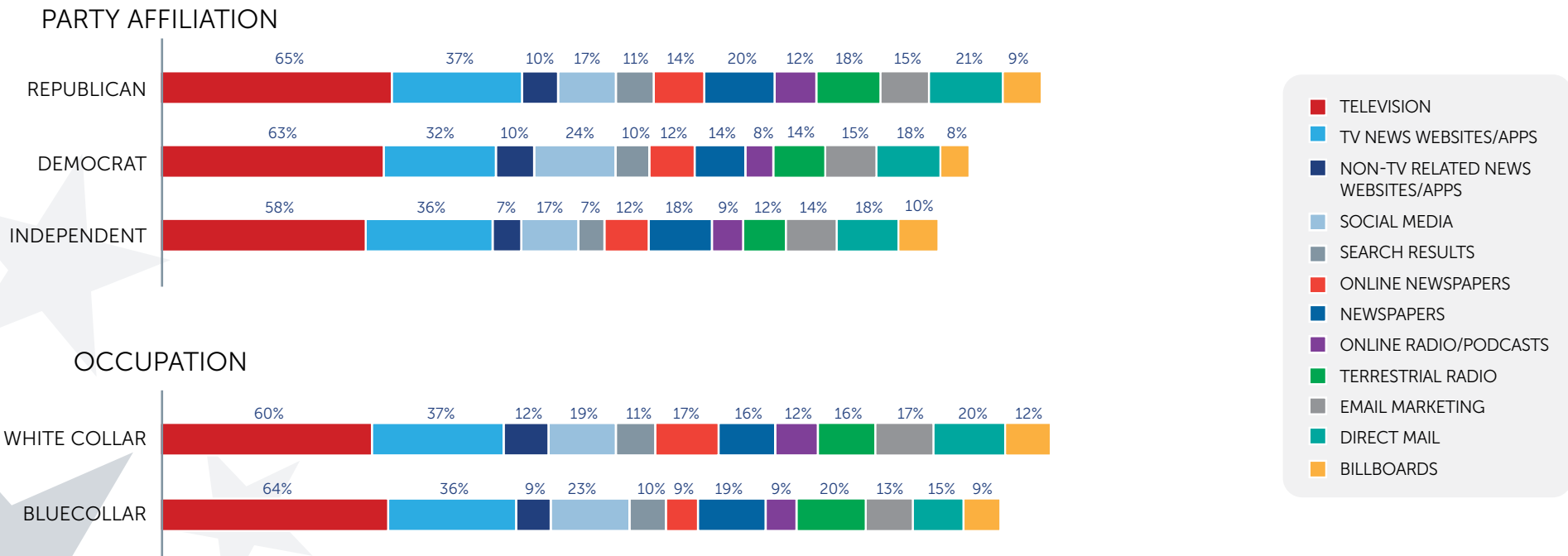


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q18: Which of the following types of political advertisements have prompted you to take an action (i.e. seek information about a political candidate/ issue, discuss with family/friends/co-workers)? Total Respondents=1,003.

Almost Two-Thirds of Democrats & Republicans Are Likely To Take An Action After Seeing A Political Ad On TV

Against Independents, TV ads are over **3x** more likely than social media, and almost **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?
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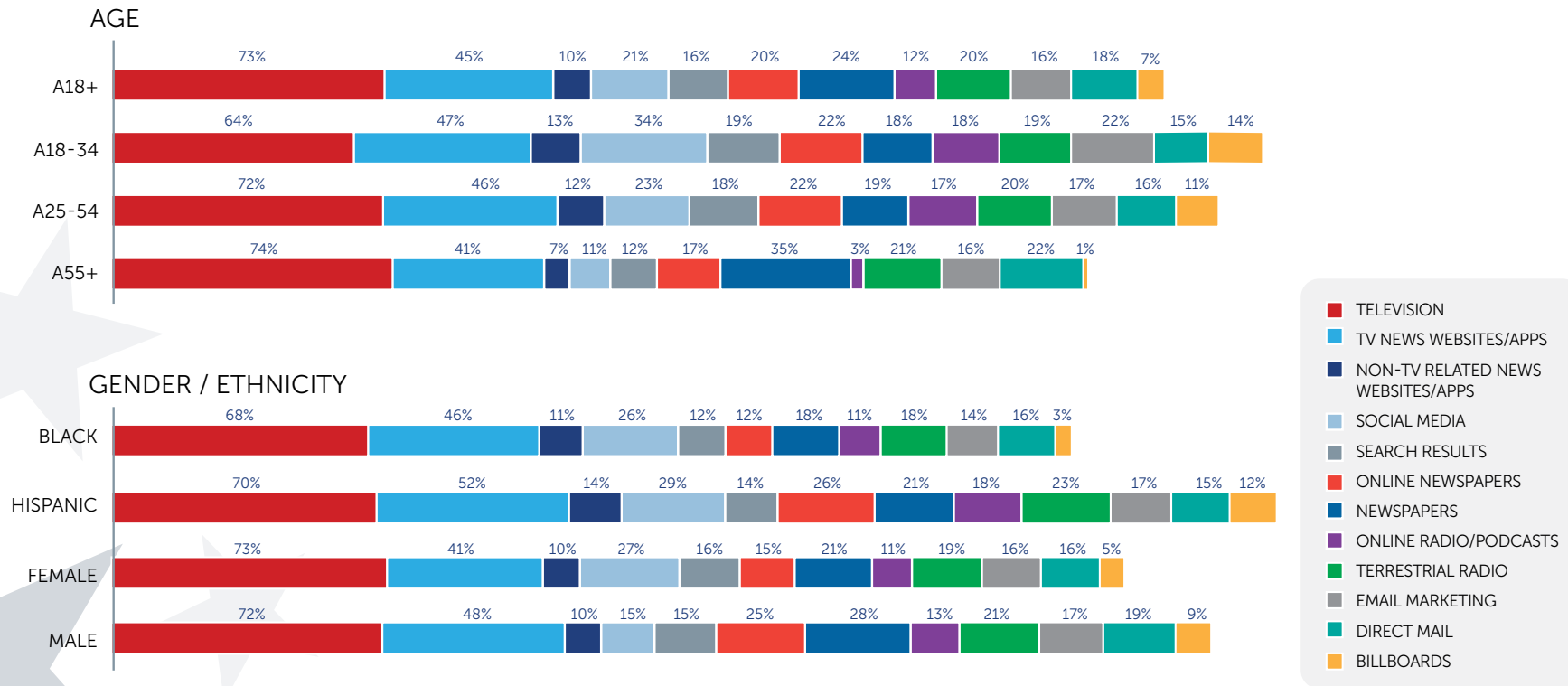


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q18: Which of the following types of political advertisements have prompted you to take an action (i.e. seek information about a political candidate/ issue, discuss with family/friends/co-workers)? Total Respondents=1,003.

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

Survey Fun Fact: 58% of adults 18+ and 67% of adults 18-34 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?

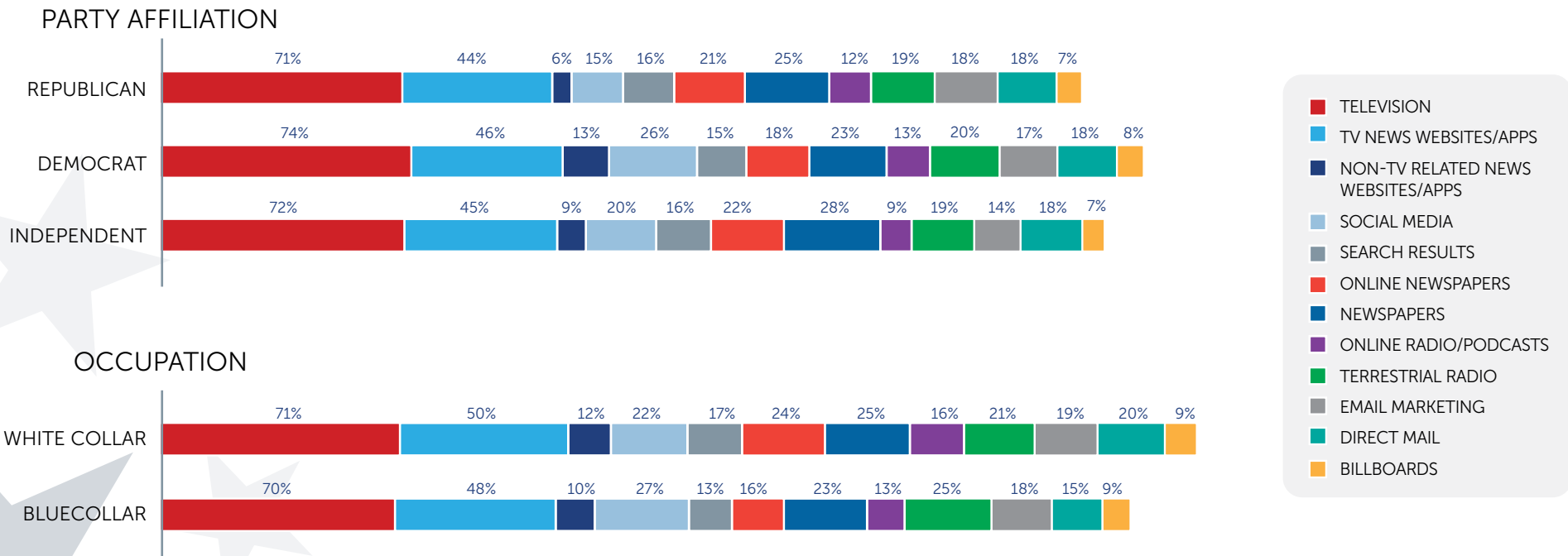


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q16: Which of the following keeps you informed about Political candidates and issues...? Q20: How much do you agree or disagree with the following statements? Cable TV news websites/apps (CNN.com, MSNBC.com, etc.) are a good source for political information. Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

Over 70% Of Each Party & Occupation Are Likely To Rely On TV To Keep Them Informed Throughout The Election Cycle

Survey Fun Fact: 66% of Democrats and 66% of blue collars 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?

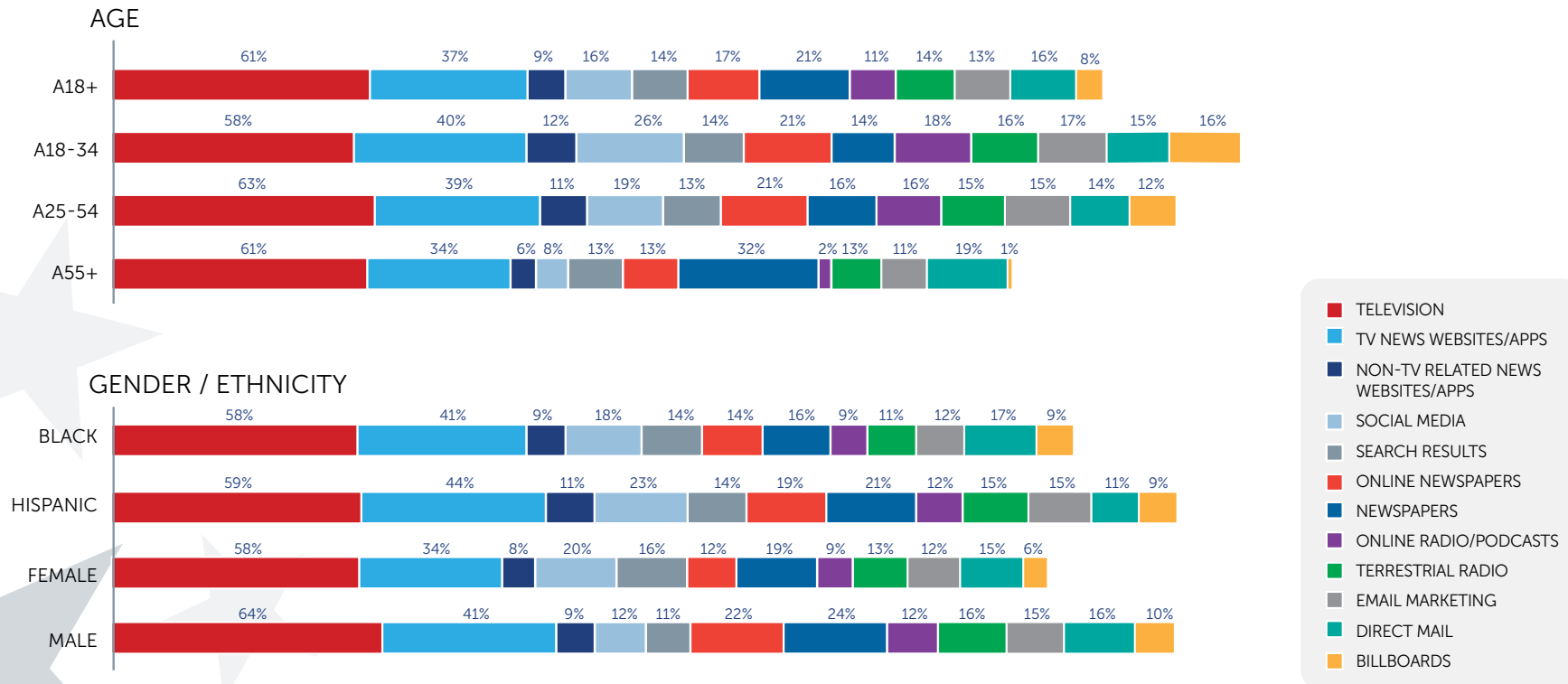


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q16: Which of the following keeps you informed about Political candidates and issues...? Q20: How much do you agree or disagree with the following statements? Cable TV news websites/apps (CNN.com, MSNBC.com, etc.) are a good source for political information. Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

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

Survey Fun Fact: 55% of adults 18+ and 65% of adults 18-34 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?

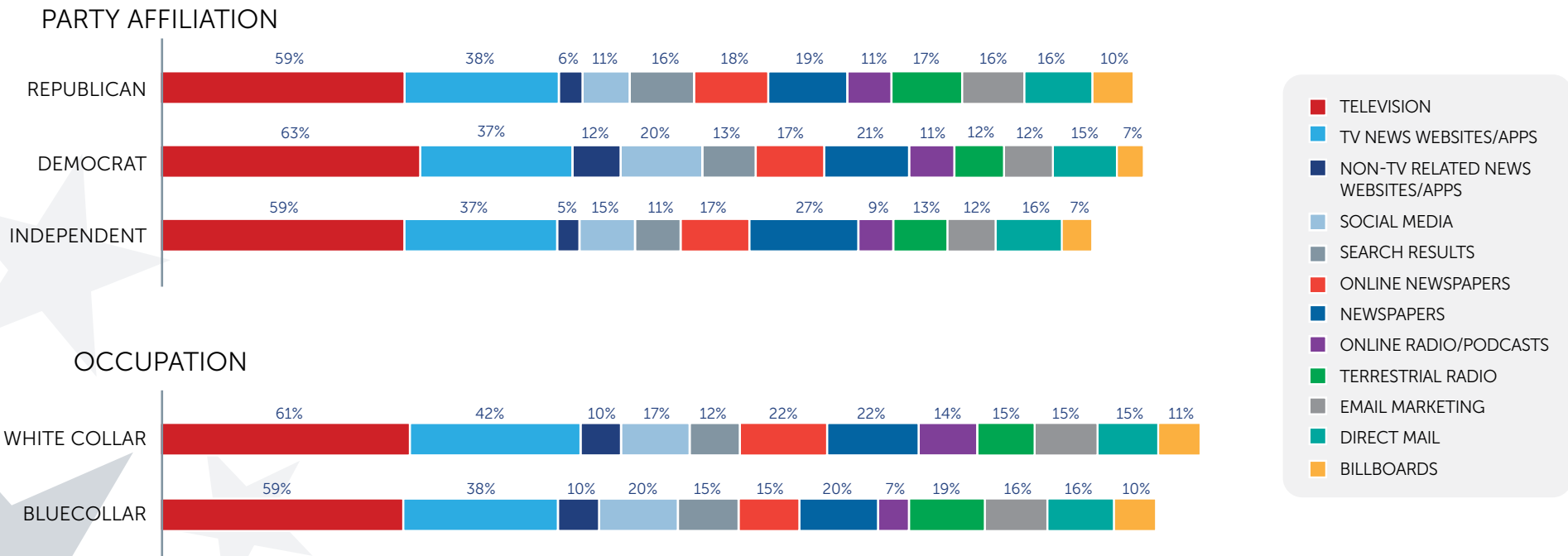


Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Numbers do not equal 100% as multiple selections were allowed. Q17: Which of the following influences your final decision when voting for political candidates and issues...? Q24: How much do you agree or disagree with the following statements? Political ads on the radio all seem the same to me. Respondents who answered Agree or Strongly Agree. Total Respondents=1,003.

A Majority Of Republicans, Democrats And Independents Say That TV Influences Their Final Voting Decisions

Survey Fun Fact: 58% of Republicans and 60% of white collars 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. Total Respondents=1,003.



The Influence Advantage: Multi-Screen TV vs. Total Online Platforms

The Collective Influence Of Multi-Screen TV Is Much Greater Than The Aggregate Of All Online Platforms Across Demos

Television reels in voters right from the start as they begin to gather information on upcoming elections

← Initial Stages of Decision Making Process →

| | Where Do You <i>Get Most Of Your Information</i> About National Politics From? | Which Of The Following Types Of Political Advertising Is Most Likely To <i>Get Your Attention</i> ? | Where Are You Most Likely To <i>First Learn</i> About Political Candidates And Issues? |
|----------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| A18+ | 85% / 48% | 84% / 44% | 82% / 41% |
| A18-34 | 81% / 67% | 81% / 66% | 79% / 61% |
| A25-54 | 83% / 53% | 85% / 51% | 83% / 48% |
| A55+ | 89% / 35% | 83% / 27% | 84% / 24% |
| Black | 85% / 47% | 83% / 38% | 88% / 36% |
| Hispanic | 84% / 56% | 85% / 57% | 79% / 48% |
| Female | 85% / 48% | 81% / 46% | 81% / 42% |
| Male | 85% / 48% | 86% / 42% | 83% / 39% |

■ 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). Total Respondents=1,003

The Collective Influence Of Multi-Screen TV Is Much Greater Than The Aggregate Of All Online Platforms Across Affiliation

Television reels in voters right from the start as they begin to gather information on upcoming elections

← Initial Stages of Decision Making Process →

| | Where Do You <i>Get Most Of Your Information</i> About National Politics From? | Which Of The Following Types Of Political Advertising Is Most Likely To <i>Get Your Attention</i> ? | Where Are You Most Likely To <i>First Learn</i> About Political Candidates And Issues? |
|--------------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| Republican | 84% / 45% | 84% / 38% | 83% / 37% |
| Democrat | 87% / 51% | 85% / 51% | 84% / 43% |
| Independent | 82% / 48% | 81% / 40% | 80% / 42% |
| White Collar | 85% / 55% | 85% / 49% | 81% / 47% |
| Blue Collar | 81% / 41% | 84% / 52% | 84% / 40% |

■ 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). Total Respondents=1,003

Multi-Screen TV's Influence Over Online Platforms Continues Through The Decision Making Process Up To Election Day

Voters start to rely on multi-screen TV early on and continue to turn to it much more so than online platforms

← **Advanced Stages of Decision Making Process** →

| | Which Of The Following Types Of Political Advertisements Have Prompted You To Take An Action? | Which Of The Following Keeps You Informed About Political Candidates And Issues? | Which Of The Following Influences Your Final Decision When Voting For Political Candidates And Issues? |
|----------|------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| A18+ | 76% / 44% | 85% / 48% | 76% / 44% |
| A18-34 | 75% / 59% | 82% / 64% | 75% / 59% |
| A25-54 | 76% / 50% | 85% / 53% | 76% / 50% |
| A55+ | 76% / 32% | 86% / 35% | 76% / 32% |
| Black | 78% / 41% | 86% / 48% | 75% / 48% |
| Hispanic | 80% / 47% | 84% / 56% | 76% / 46% |
| Female | 77% / 42% | 85% / 50% | 74% / 47% |
| Male | 77% / 34% | 85% / 45% | 78% / 42% |

■ 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). Total Respondents=1,003

Multi-Screen TV's Influence Over Online Platforms Continues Through The Decision Making Process Up To Election Day

Voters start to rely on multi-screen TV early on and continue to turn to it much more so than online platforms

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|---------------------|------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| Republican | 79% / 38% | 86% / 41% | 76% / 41% |
| Democrat | 76% / 41% | 87% / 52% | 77% / 49% |
| Independent | 75% / 34% | 82% / 49% | 73% / 41% |
| White Collar | 76% / 44% | 86% / 55% | 77% / 49% |
| Blue Collar | 77% / 38% | 82% / 46% | 75% / 48% |

■ 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). Total Respondents=1,003



Local Cable News: A Leader In The Community

Community, Quality, Character & Concise Coverage Are The Hallmarks Of Local Cable News

Survey Fun Fact: 65% of adult 25-54 voters say that local cable TV news channels are a good source of political information

| % Who Agree | A18+ | A18-34 | A25-54 | A55+ | Black | Hispanic | Female | Male |
|-----------------------------------------------------------------------------|------|--------|--------|------|-------|----------|--------|------|
| Local Cable provides extensive news coverage and political information | 60% | 67% | 67% | 48% | 64% | 65% | 61% | 60% |
| Local Cable has quality news programs | 58% | 67% | 65% | 47% | 67% | 59% | 60% | 57% |
| Local Cable provides an informative local perspective on national issues | 60% | 71% | 67% | 47% | 71% | 61% | 60% | 60% |
| I rely upon local cable news to cover local issues that affect my community | 61% | 70% | 65% | 51% | 65% | 65% | 61% | 61% |
| I watch more Local Cable news now than in the past | 47% | 64% | 55% | 32% | 49% | 57% | 50% | 45% |

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. Total Respondents=1,003.

This Authentic, Community-Driven Approach Works Well Across Party Affiliation As Well As Both Blue & White Collars

| % Who Agree | Republican | Democrat | Independent | White Collar | Blue Collar |
|-----------------------------------------------------------------------------|------------|----------|-------------|--------------|-------------|
| Local Cable provides extensive news coverage and political information | 59% | 64% | 55% | 65% | 66% |
| Local Cable has quality news programs | 58% | 63% | 51% | 62% | 66% |
| Local Cable provides an informative local perspective on national issues | 59% | 62% | 57% | 64% | 73% |
| I rely upon local cable news to cover local issues that affect my community | 59% | 65% | 56% | 64% | 67% |
| I watch more Local Cable news now than in the past | 47% | 51% | 42% | 52% | 59% |

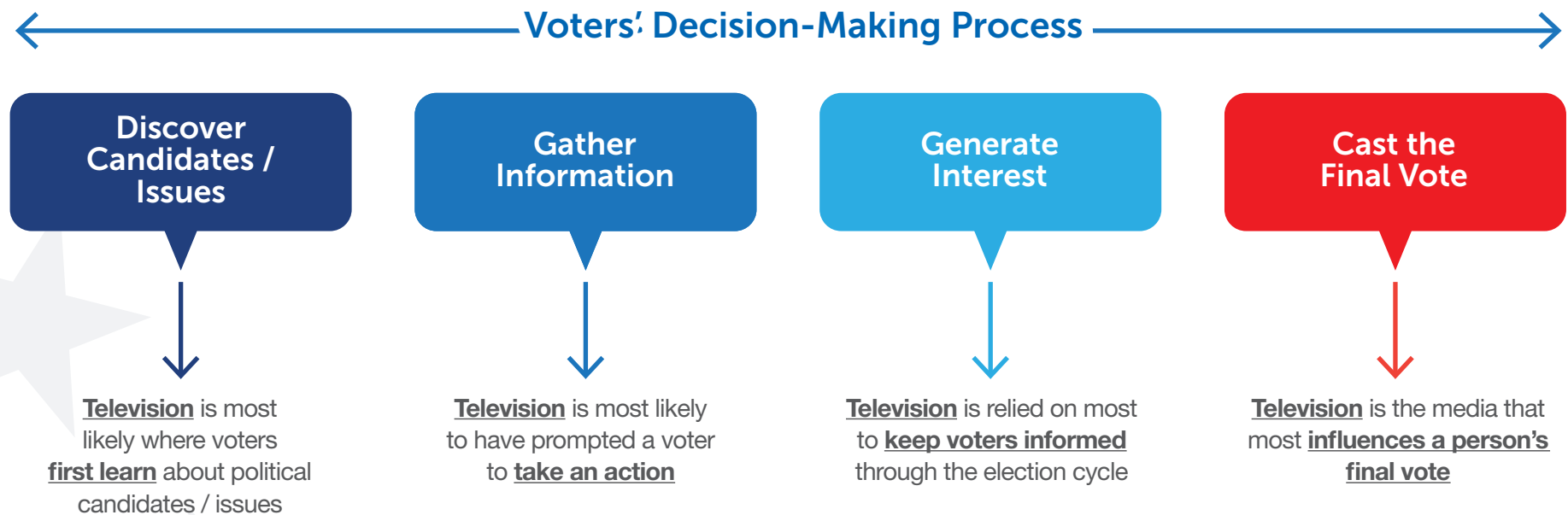
Source: VAB / Research Now Poll of Registered or Likely Voters A18+; June 2018. Q27: Thinking about Local Cable News, please rate the following statements (Respondents who answered Agree or Strongly Agree). Total Respondents=1,003.

Final Thoughts

While politics has the ability to divide the country, the desire for trustworthy and accurate news sources is what unites 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.



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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