CSPI Compelling Research (Proof)

**PBS Audience: Broad Reach and Viewership**
- PBS reaches 94% of all U.S. households.
- Over the course of a year, 82% of U.S. TV households and 198 million people watch PBS.
- PBS’ primetime household audience is larger than many commercial channels, including Bravo (PBS’ audience is 133% larger), TLC (116%), HBO (79%), Discovery Channel (51%), HGTV (48%), and A&E (120%). In addition, PBS’ primetime rating for news and public affairs programming is 109% higher than CNN’s primetime audience.
- PBS is a top 5 network for adults 55+ in primetime.

**2016 PBS Public Opinion Survey**
For 13 consecutive years, a nationwide public opinion survey has confirmed that PBS is rated **#1 in trust** among nationally known institutions, including commercial TV networks, and are called an “excellent” use of tax dollars”. Through the yearly study, the American public called PBS the most “fair” source for news coverage and ranked PBS **#1 in importance** compared to commercial broadcast and cable TV.

**Source:** CARAVAN ORC International, January 2016

**PBS Audience: Unduplicated**
PBS viewers are selective and loyal – most count on PBS to be their source for news, education, and entertainment. Of viewers who tune-in to PBS:
- 82% do not watch A&E
- 84% do not watch CNN
- 89% do not watch MSNBC
- 92% do not watch BBC America
- 79% do not watch Discovery
- 73% do not watch History
- 79% do not watch AMC


**PBS Audience: Affluent**
The 2015 Ipsos Affluent Survey USA shows PBS to have strong reach with high net worth viewers:
- When compared to most cable news networks, PBS provides strong reach with high net worth viewers (i.e. adults 18+, HHI $100K+).
- PBS’ total brand footprint reaches over 24 million Affluents.
- Of the 15,267 Affluents surveyed, PBS viewers on average had higher median incomes, net worth, and liquid assets.
- 40% of PBS Affluent viewers have post-graduate degrees.
- PBS Affluents rank #1 in visiting Europe in the past 3 years.
- PBS viewers, more often than CBS, NBC, ABC, FOX, USA, TNT, History and FOX News Channel affluent viewers, use full-service brokers, financial planners and CPAs.

**PBS Audience: Opinion Leaders**
The 2015 Erdos & Morgan national study of opinion leaders verified that PBS News and Public Affairs programming continues to be a trusted source for news and information that opinion leaders turn to on a regular basis:
- Five out of the top 10 most “credible” television sources that reach most opinion leaders were PBS programs. PBS NewsHour was #1 among all series with a 68.9 rating.
- Four out of the top 10 most “objective” television sources that reach most opinion leaders were PBS programs. Nightly Business Report and PBS NewsHour ranked #1 and #2 respectively.
- PBS NewsHour and BBC WORLD NEWS were among the top 10 TV programs watched by opinion leaders.
- PBS was fourth among the top 10 TV networks watched by opinion leaders in the last week.

**PBS KIDS Highlights**
- **Broad Reach/Co-Viewing:** 77% of kids 2-8 & 80% of moms of kids under 12 watch PBS KIDS.
- **Diverse:** PBS KIDS attracts a higher proportion of viewers from Hispanic, African American and Low-Income households compared to their representation in the U.S. population.
- **Halo Effect:** 80% of moms agree that companies that support PBS KIDS programs and services are trustworthy and exceptional.
- **Recall:** more than ½ of parents say they pay attention to the sponsor messages on PBS KIDS.
- **Results:** kids who watched SESAME STREET in preschool spent more time reading for fun in high school and obtain higher grades.
- **Impact:** 74% of parents say their child exhibits more positive behavior after engaging with PBS KIDS, compared to Disney Jr (60%), and Nick Jr (55%).
- **Brand Trust:** PBS KIDS is the most educational media brand for children. 88% agree that PBS is a trusted and safe place for children to watch television.

**Sources:**
**PBS Audience: Qualitative Research**

**Educated:** PBS Viewers value education and make lifelong learning a priority:
- PBS viewers are 18% more likely to have a post-graduate degree
- PBS viewers are 25% more likely to attend adult education courses
- Viewers of PBS History/Biography are 26% more likely to agree with the statement “I am often interested in theories.”
- Viewers of PBS Drama are 25% more likely to agree with the statement “I like to learn about art, culture, and history.”
- Viewers of PBS Drama are 31% more likely to agree with the statement “I would like to spend a year or more in a foreign country.”
- Viewers of PBS Science/Nature are 28% more likely to agree with the statement “I would like to understand more about how the universe works.”

**Influential:** PBS viewers drive trends through word of mouth and influence corporate and social networks:
- Viewers of MASTERPIECE are 83% more likely to be a member of a group that tries to influence public policy or government
- PBS contributors are 43% more likely to hold the job title of President

**Culturally Minded:** PBS viewers are passionate about the arts:
- Viewers of PBS Drama are 367% more likely to attend classical music/opera performances
- Viewers of PBS Arts & Performance are 111% more likely to attend art galleries/shows
- Viewers of CHARLIE ROSE are 136% more likely to visit Museums

**Community-minded:** PBS viewers care about the future of their community, participate in local initiatives, and are highly active in the community:
- Viewers of NOVA are 108% more likely to participate in Environmental Groups/Causes
- Viewers of PBS News & Public Affairs are 75% more likely to be affiliated with a charitable organization
- Viewers of PBS Drama are 52% more likely to have served on a committee for some local organization
- PBS contributors are 45% more likely to have attended a public meeting on town or school affairs

**Clutter Stats**

<table>
<thead>
<tr>
<th>Clutter Stats</th>
<th>Primetime Non-Programming Minutes:</th>
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<tbody>
<tr>
<td>Commercial TV: 3 minutes, 15 seconds</td>
<td></td>
</tr>
<tr>
<td>Cable TV: 14 minutes, 33 seconds</td>
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**Halo Effect and Sponsorship Perceptions**

**PBS Sponsorship Drives Positive Perceptions:**
- 76% of PBS viewers say that companies that advertise on PBS have a commitment to quality and excellence, and a commitment to education
- 74% say PBS sponsors provide a valuable public service
- 70% say PBS sponsors are high quality brands
- 62% say they are industry leaders

**PBS Sponsorship Enhances Quality Perception:**
- 68% of PBS viewers surveyed expect advertising on PBS to look and sound better than advertising on other networks

**PBS Sponsorship Increases Recall:**
- PBS viewers are 38% more likely to watch shows that air on PBS with their full attention than they are to watch shows that air on the other networks they watch most often.
- 64% say the advertising on PBS is more trustworthy than on other networks

**PBS Sponsorship Drives Action and Purchase Preference:**
- 36% of PBS viewers research more information on a company, product or service advertised on PBS
- 18% actually bought a product or service advertised on PBS
- 19% of those motivated to purchase bought a car

**2013 Cone Communications Social Impact Study**

- 89% consumers are likely to switch from one brand to another, about the same price/quality, if other brand is associated with a good cause
- Consumers consider a company’s social and environmental commitment before making important decisions:
  - 85% say it is very/somewhat important as to which companies they want to see doing business in their communities
  - 82% say it is very/somewhat important when deciding what to buy or where to shop
  - 71% say it is very/somewhat important when deciding where to work
  - 54% report they have bought a product with a social and/or environmental benefit in the past twelve months

Source: Doublebase Mediamark Research, Inc., 2015

Source: Nielsen, Oct 2015

Source: PBS Sponsorship Study: Audience Attitudes & Behaviors, City Square Associates, March 2015

Source: Cone Communications Social Impact Study, 2013