

PBS Audience: Broad Reach and Viewership

- PBS reaches 94% of all U.S. households¹
- Over the course of a year, 82% of U.S. TV households and 198 million people watch PBS²
- 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 audience²
- PBS is a top 5 network for adults 55+ in primetime³

Sources: 1. Nielsen, 2015 2. Nielsen NPower, 9/22/2014-9/20/2015 3. NTI NPower Top 50 9/22/2014 - 9/20/2015.

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

Source: Nielsen NPower, May 2014, 6 minute qualifier

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.

Source: 2015 IPSOS Affluent Survey USA

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: 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.

Source: Erdos & Morgan Opinion Leaders Study, 2015

PBS KIDS Highlights

- **Broad Reach/Co-Viewing:** 77% of kids 2-8 & 80% of moms of kids under 12 watch PBS KIDS¹
- **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. population²
- **Halo Effect:** 80% of moms agree that companies that support PBS KIDS programs and services are trustworthy and exceptional³
- **Recall:** more than ½ of parents say they pay attention to the sponsor messages on PBS KIDS³
- **Results:** kids who watched SESAME STREET in preschool spent more time reading for fun in high school and obtain higher grades⁴
- **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%),⁵
- **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 television⁶

Sources: 1. Nielsen NPOWER, NTI 13-14 season 2. Nielsen NPower, all PBS KIDS programs, 4Q cume 2013 3. ORC Parent Caravan, Apr 2014 4. “G” is for “Growing:” 30 years of research on Sesame Street 5. SmartyPants LLC, School Readiness Study, Jan 2014. 6. CARAVAN ORC International, Jan 2016

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

Source: Doublebase Mediamark Research, Inc., 2015

Clutter Stats

Primetime Non-Programming Minutes:
PBS: 3 minutes, 15 seconds
Commercial TV: 14 minutes, 33 seconds
Cable TV: 14 minutes, 40 seconds

Source: Nielsen, Oct 2015

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

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

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: Cone Communications Social Impact Study, 2013