



PBS

*Accessible*      *Influential*

**Compassionate**      **Diverse**

**Global in Perspective**

**Intelligent**      **Dynamic**

*Witty and Clever*

**Local Impact**      **Educated**

**Inspiring**      *Engaging*



PBS

It's true... For over 35 years, PBS has been delivering award-winning, critically acclaimed programming...

**But, we weren't talking about our programs...**



# Those are Our Viewers...

- PBS viewers are a lot like our programs, so it's not surprising that you might have thought we were describing our programming.
- In fact, PBS is the number one place to reach viewers who are tuned in to the world around them – engaged in stimulating programming, and engaged in their communities.

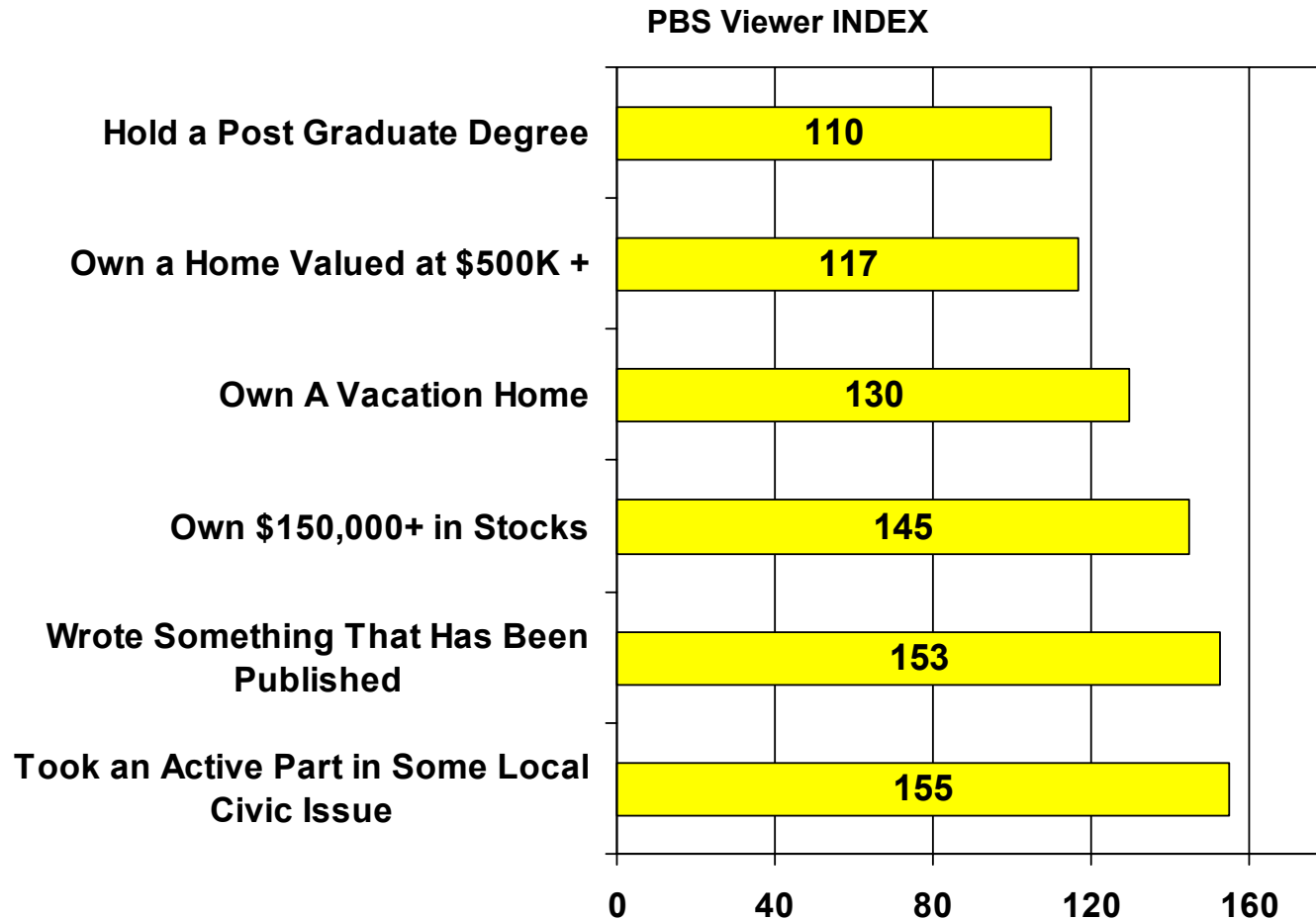


# Take a Closer Look

- PBS viewers aren't only a desirable demographic in terms of features...
- PBS viewers also reflect America.
- And... PBS is America's first choice provider for factual and literary-based content.
  - More viewers tune to PBS than to any other provider of similar programming.
  - Ratings for PBS genres consistently exceed those of providers of similar content.



# PBS Audiences: Affluent, Educated, Influential



Source: 2004 Doublebase,  
Mediamark Research Inc.

**Index 100 = Average U.S. Adult**



# PBS Audiences Also Reflect America

<i>Full Day Profile</i>	<b>% Total U.S. TV Households</b>	<b>% PBS Audience</b>
<b><i>Race/Ethnicity of Household</i></b>		
Black	12.1	11.4
Spanish Origin	10.2	10.2
<b><i>Education of Household</i></b>		
<4 Yrs. High School	14.4	14.6
High School Grad.	29.9	28.2
Some College	27.3	26.7
College Graduate+	28.3	30.0
<b><i>Household Income</i></b>		
Less than \$20,000	22.1	20.7
\$20,000-\$39,999	23.1	23.7
\$40,000-\$59,999	17.6	17.1
\$60,000+	37.2	38.4
<b><i>Gender</i></b>		
Men	37.0	37.2
Women	39.9	42.2

NTI, average of persons 2+ cumes for one week each in Oct. & Nov. 2004 and Jan., Feb., April, May, July & Sept. 2005.

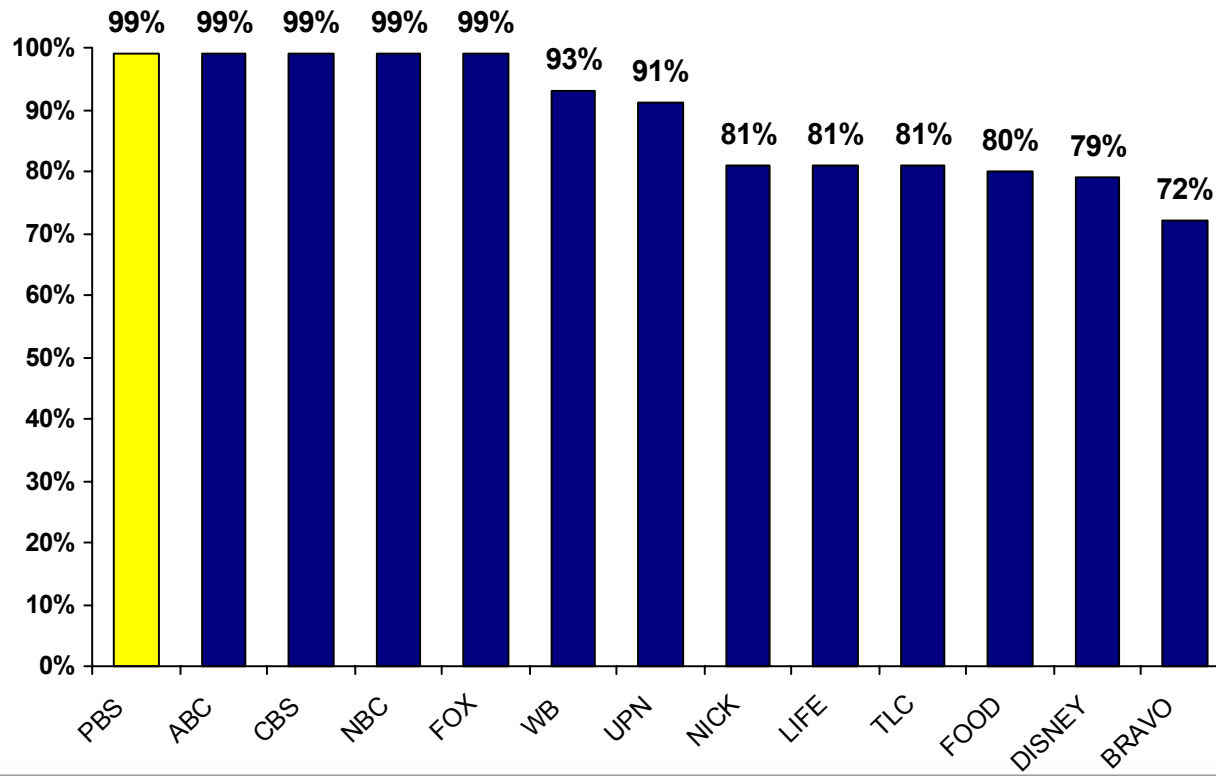


# PBS Reaches America

## PBS HAS 99% COVERAGE

PBS is available in nearly every household in America—matched only by ABC, CBS, NBC, and FOX.<sup>1</sup> That's right...our coverage surpasses WB, UPN, and all cable networks!

National TV Coverage  
Percentage of Households with Reception



<sup>1</sup>NTI, average of HH, persons 2+ cumes, one week each in Oct., Nov. 2004 and Jan., Feb., April, May, July, Sept. 2005. <sup>2</sup>NTI Pocketpiece, NHI NTAR (Oct. 2005).



PBS

# **PBS is America's first choice provider for factual and literary-based content.**

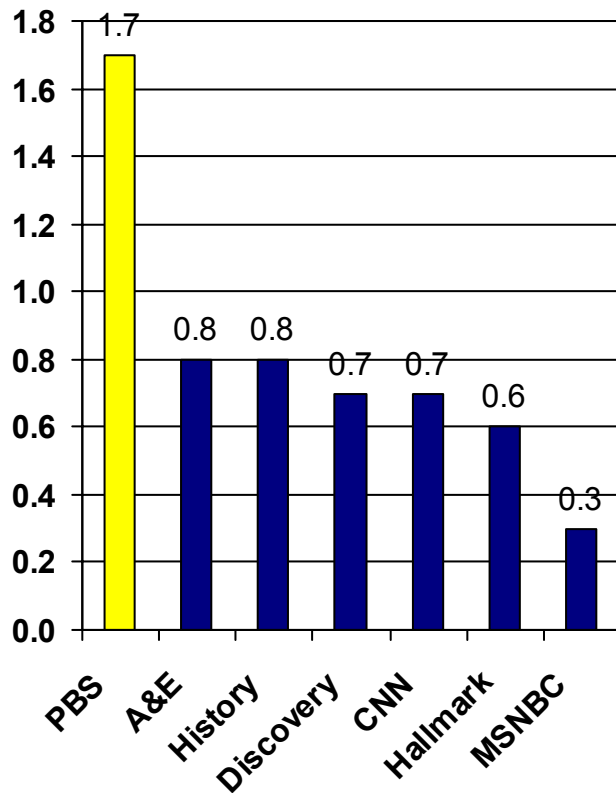
Not only does PBS attract desirable viewers and have access to virtually every household in the country, but more households and adults watch PBS than providers of similar content.

And, when ratings for PBS programming genres are compared to those of providers of similar content, PBS comes out ahead time and time again.

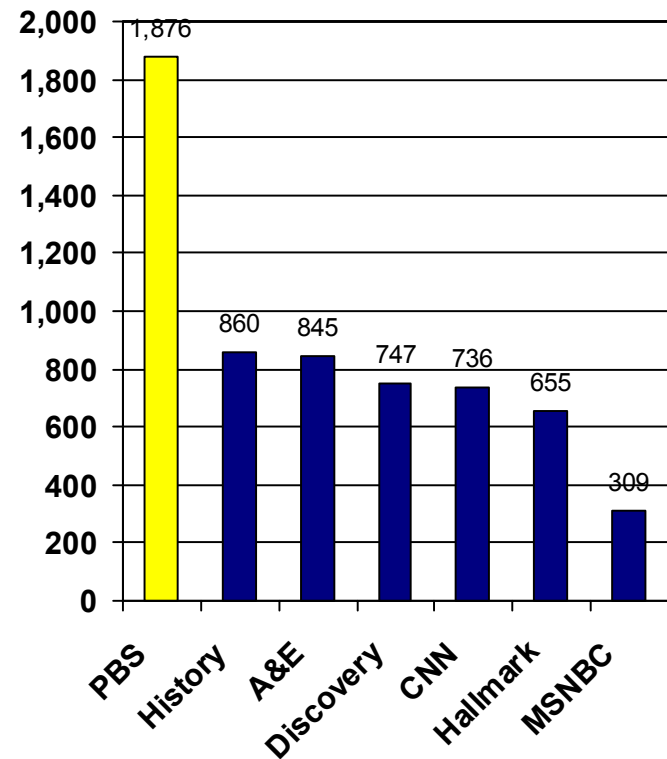


# PBS Primetime Programming Reaches More Households

### 2004-05 Primetime Household AA Ratings



### 2004-05 Primetime Household AA (000)

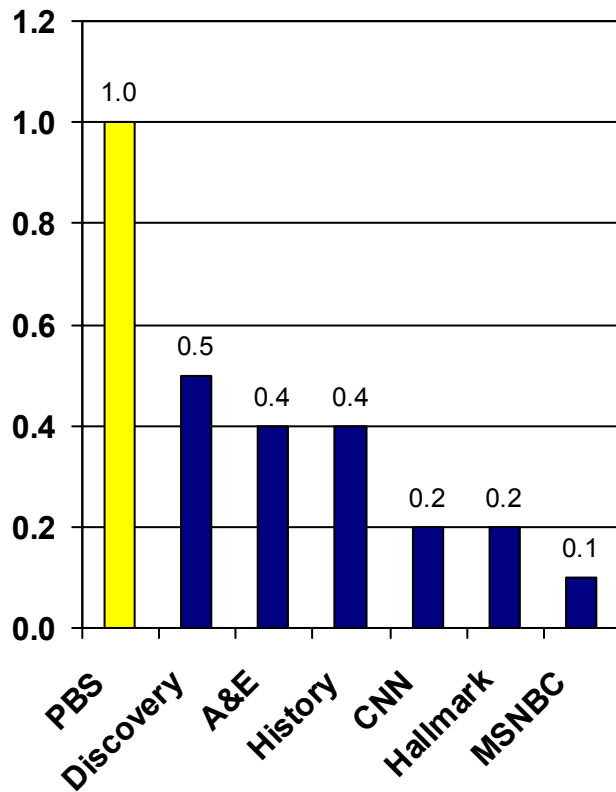


Source: NTI Galaxy Explorer, October 2004 – September 2005. Includes select cable channels

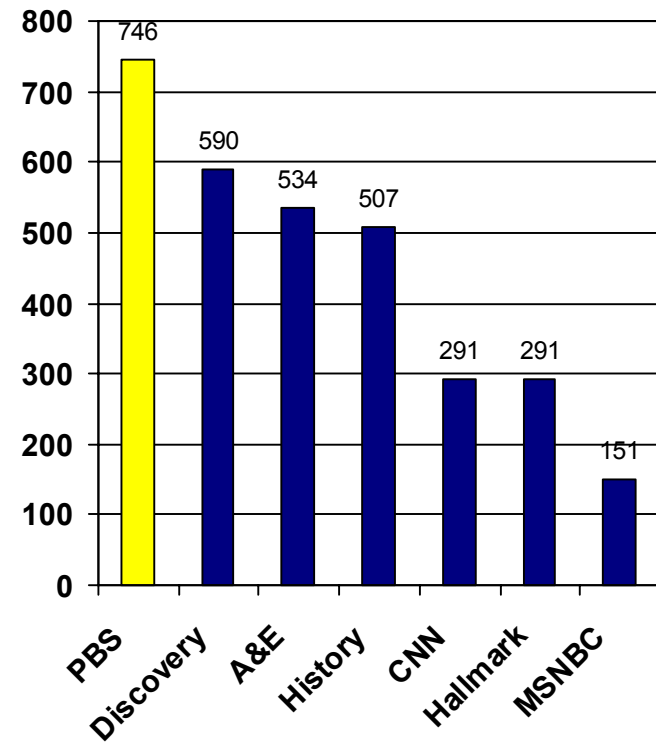


# PBS Primetime Programming Reaches More Adults 25-54

2004-05 Primetime Adults 25-54 AA Ratings



2004-05 Primetime Adults 25-54 AA (000)

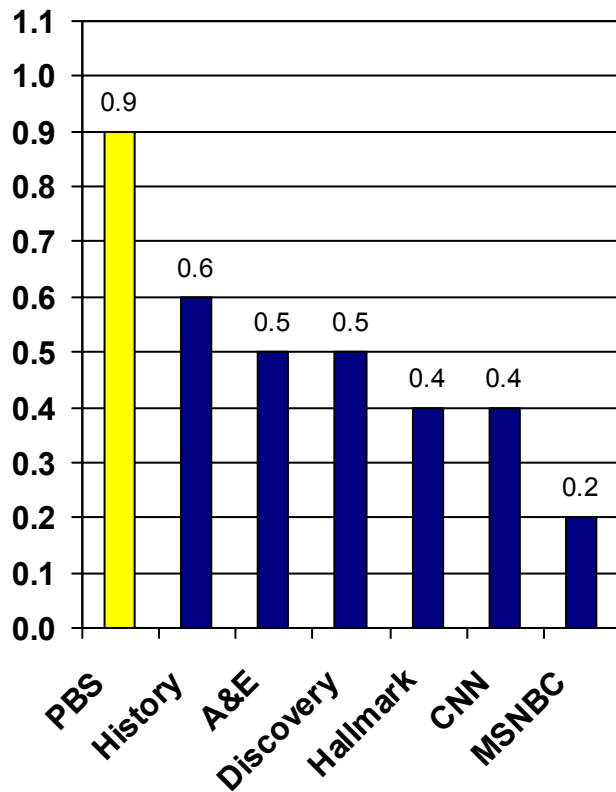


Source: NTI Galaxy Explorer, October 2004 – September 2005. Includes select cable channels

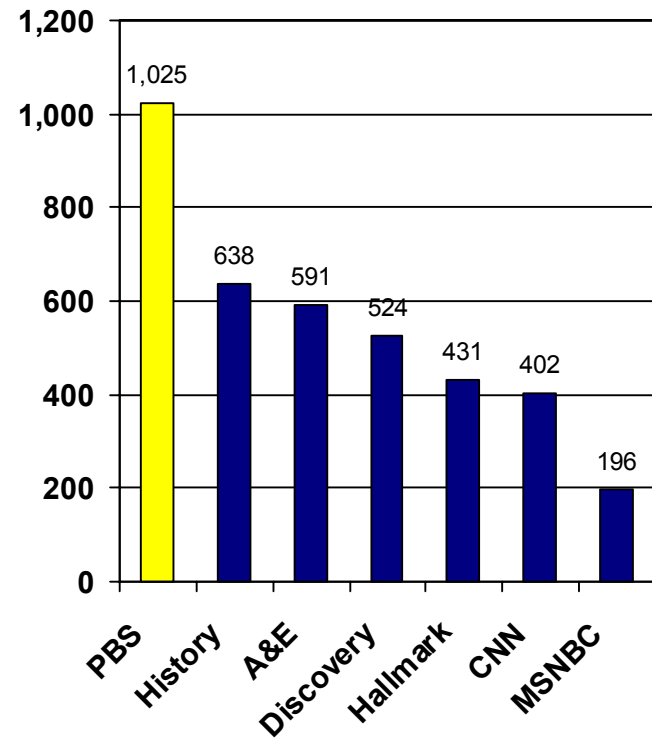


# PBS Primetime Programming Reaches More Adults 35-64

2004-05 Primetime Adults 35-64 AA Ratings



2004-05 Primetime Adults 35-64 AA (000)



Source: NTI Galaxy Explorer, October 2004 – September 2005. Includes select cable channels



# ... And those viewers are not always tuning in to other channels...

Total Day Viewing Among Cable Households

- 74% of cable households that watch PBS do not tune into The History Channel
- 71% of cable households that watch PBS do not tune into CNN
- 73% of cable households that watch PBS do not tune into The Discovery Channel
- 69% of cable households that watch PBS do not tune into A&E



# Unduplicated Audiences

Primetime Viewing Among Cable Households w/HHI \$75K+

**87%** of cable households that watch PBS **do not** tune into Bravo during Primetime.

**85%** of cable households that watch PBS **do not** tune into Discovery during Primetime

**82%** of cable households that watch PBS **do not** tune into A&E during Primetime.

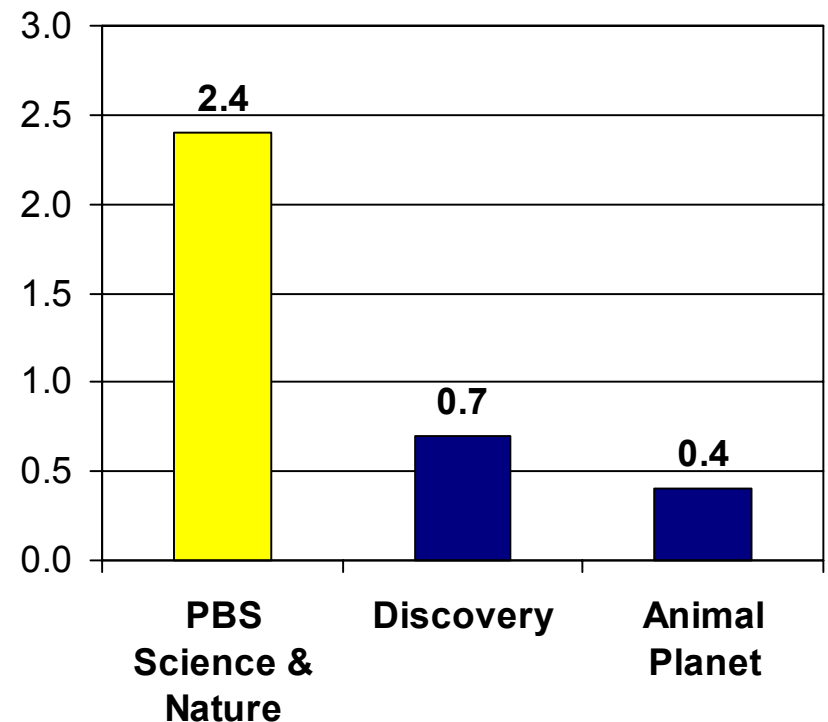
**80%** of cable households that watch PBS **do not** tune into CNN during Primetime.



# PBS Science & Nature Programming

- *NOVA, Nature* – For over 35 years PBS has been the leading provider of science and nature programming, and PBS continues to achieve higher ratings than providers of similar content.
- Additionally, PBS continues to provide the public with meaningful investigations into environmental and health issues such as the recent series of specials, *Rx For Survival: A Global Health Challenge*.

2004-05  
Average Household Ratings



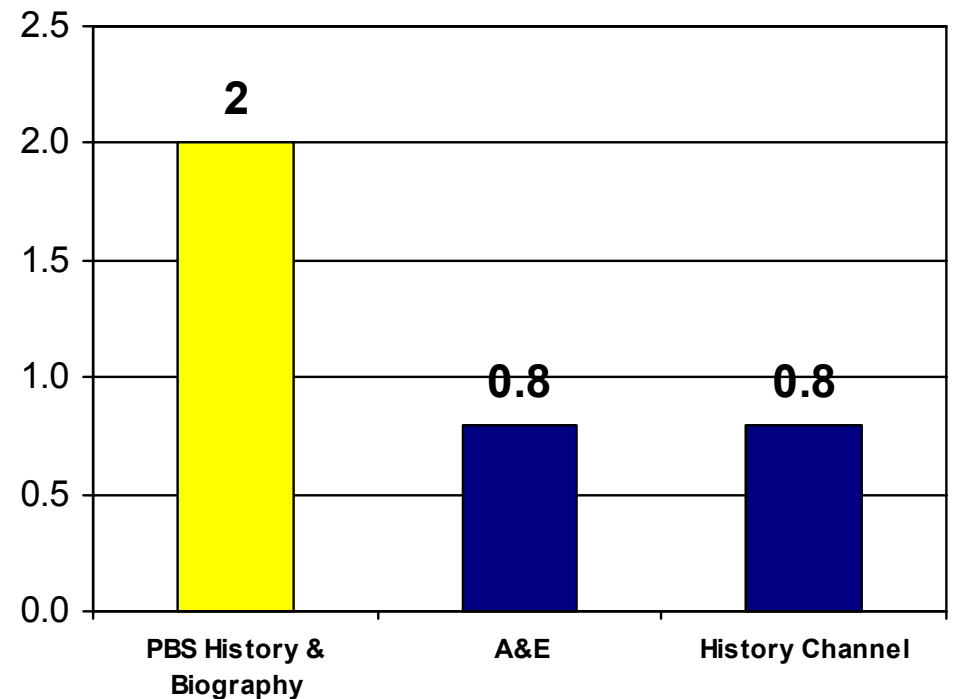
For PBS: NTI, 2004-2005 season average. Includes prime-time science and nature programs including a combination of series, mini-series and specials. For cable: Nielsen Galaxy Explorer (prime time only)



# PBS History & Biography Programming

- Marquee history & biography series such as *American Experience*, *History Detectives*, and *American Masters* attract more viewers than providers of similar content.
- PBS also features unparalleled historical and historically based programming including the upcoming *Texas Ranch House*, and the Emmy®-nominated documentary film, *Unforgivable Blackness: The Rise and Fall of Jack Johnson*.

2004-05  
Average Household Ratings



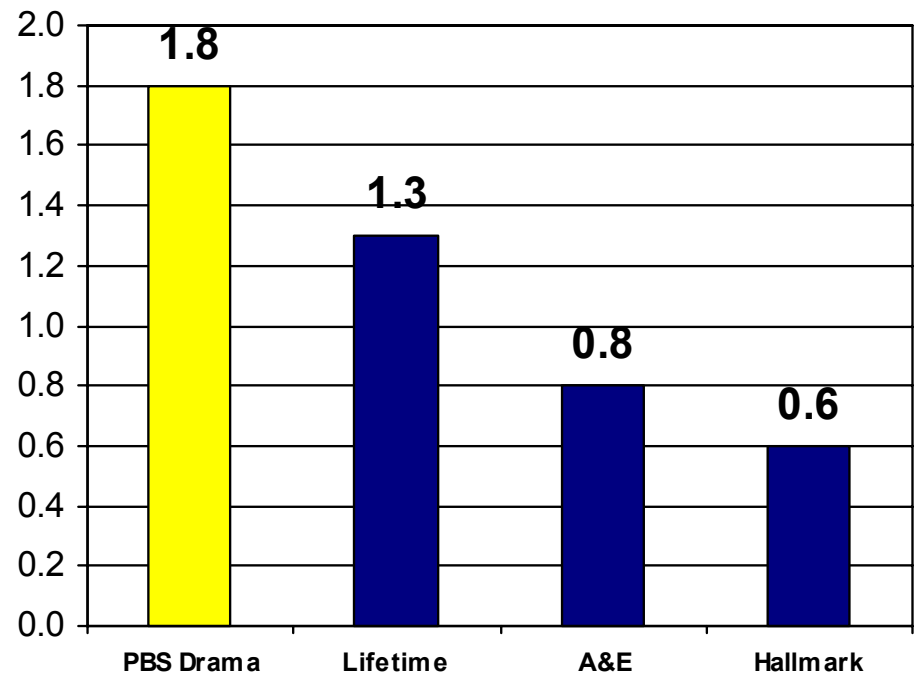
For PBS: NTI, 2003-2004 season average. Includes history and biography including a combination of series, mini-series and specials. For cable: Nielsen Galaxy Explorer (prime time only)



# PBS Drama Programming

- Award-winning, and much loved, drama and performance programs such as *Masterpiece Theatre*, and *Mystery!* attract more viewers than many comparable cable providers.
- Now, with new programming, such as the recent American *Mystery!* specials by Tony Hillerman, collaborations with partners such as HBO, and in-depth specials like *Broadway: The American Musical*, PBS brings new viewers and perspectives to this cornerstone of PBS programming.

2005-05  
Average Household Ratings



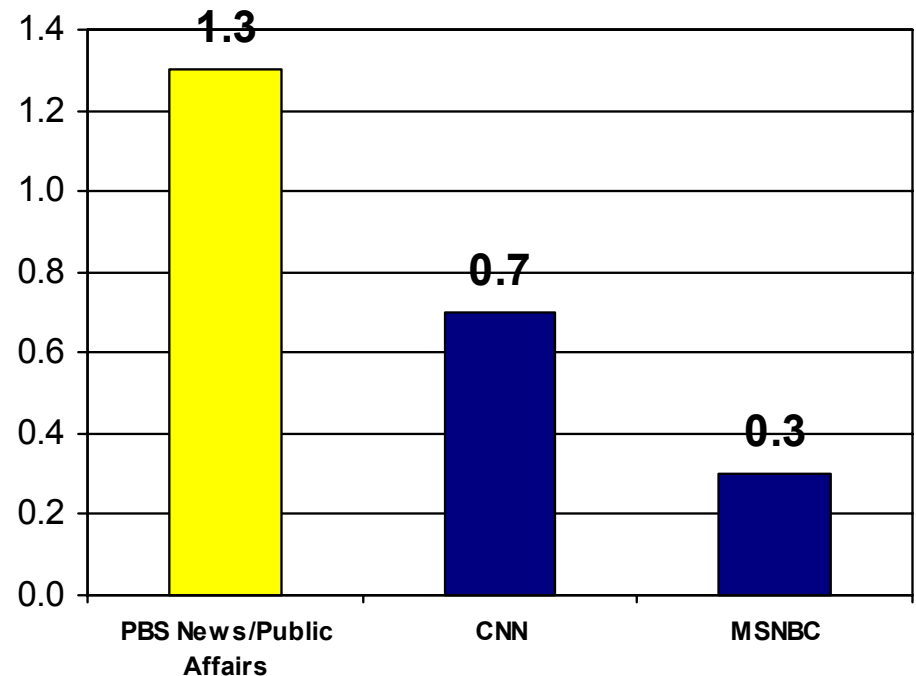
For PBS: NTI, 2004-2005 season average. Includes prime-time drama programs including a combination of series. For cable: Nielsen Galaxy Explorer (prime time only)



# PBS News and Public Affairs Programming

- News and Public Affairs Programming such as *The Newshour with Jim Lehrer*, *Washington Week*, *Frontline* and others continue to attract competitive, loyal audiences.
- PBS continues to expand program offerings in the areas of news and public affairs with the newly re-formatted *NOW*, the *Nightly Business Report* and *Tavis Smiley*.

2004-05  
Average Household Ratings



For PBS: NTI, 2004-2005 season average. Includes news and public affairs programs including a combination of series. For cable: Nielsen Galaxy Explorer (prime time only)



PBS

# Association with PBS Also Enhances Your Brand Image



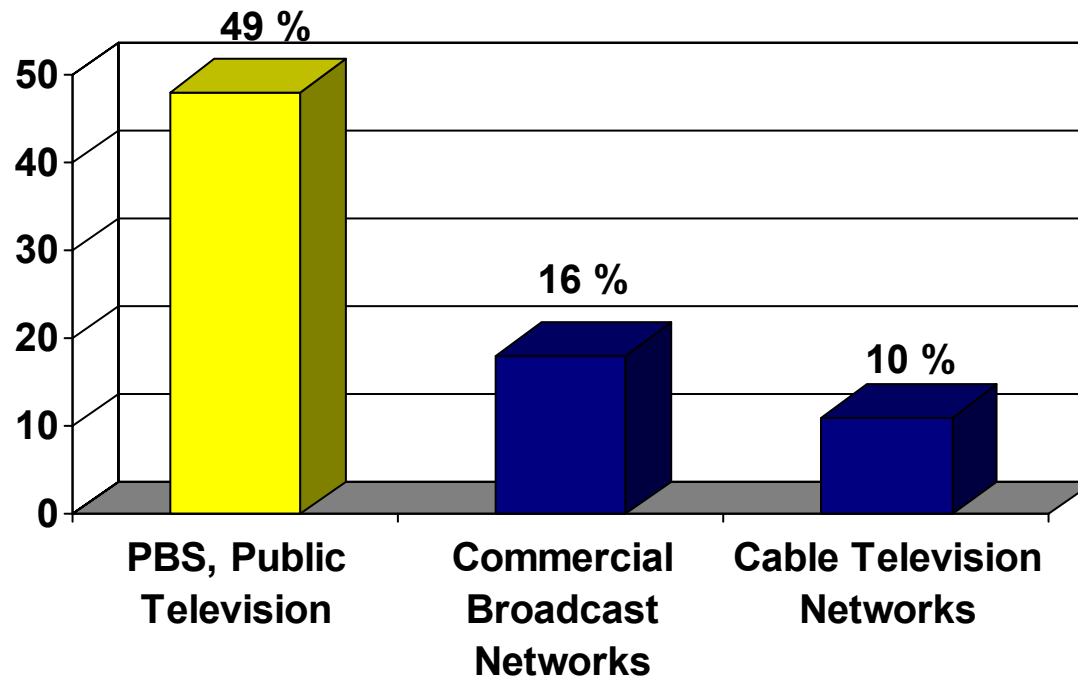
# Sponsoring PBS Programming Does Your Brand Good

- PBS and PBS KIDS enjoy public trust and high brand equity.
- Recent research by Total Research Corporation shows that companies recognized as PBS sponsors are seen by viewers as higher quality.
- This halo effect crosses over multiple categories: financial, energy, technology and children's goods.



# PBS – A Trusted Media Source

**Percentage of Respondents Who Answered "Trust A Great Deal" On a Four-point Scale**





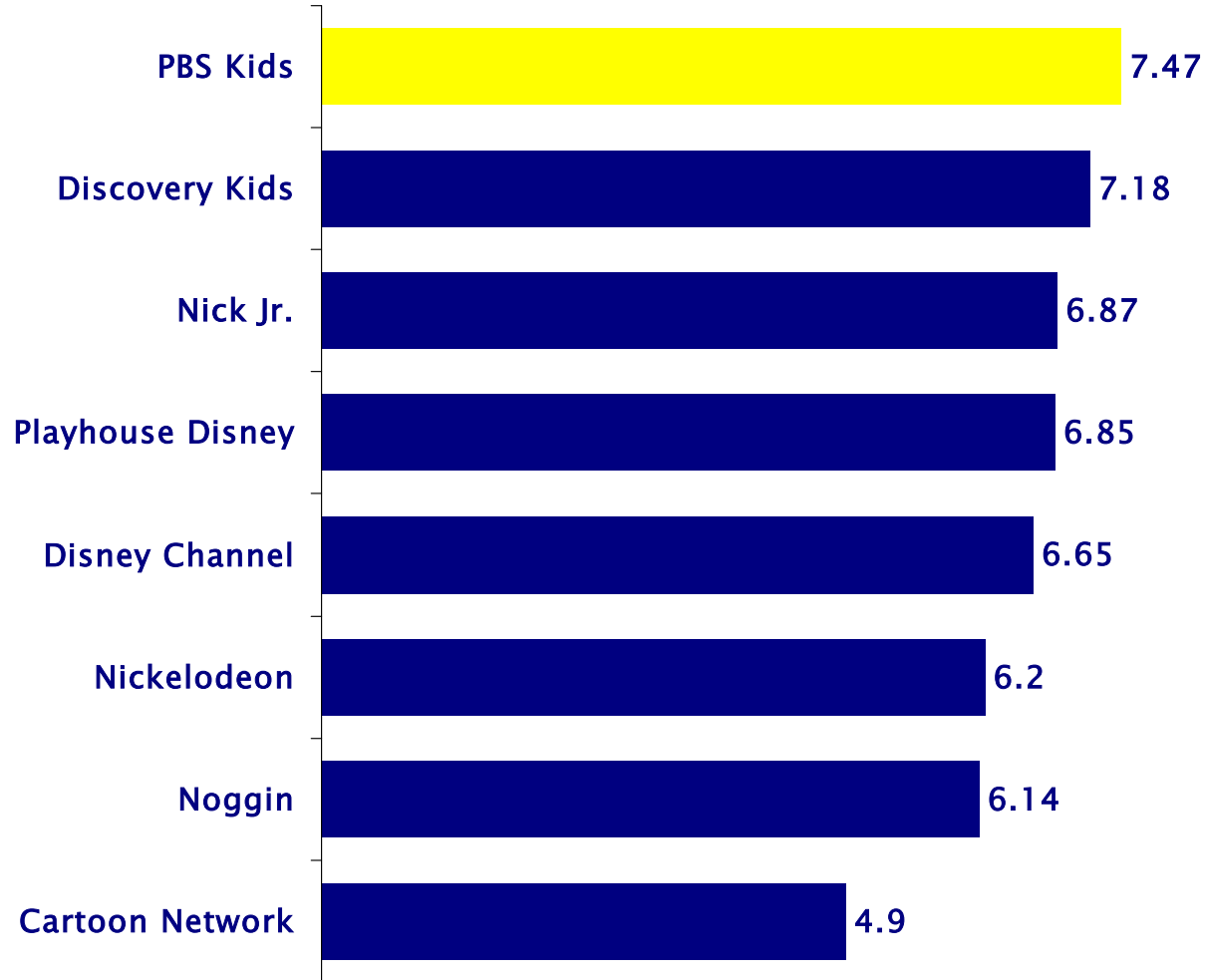
# This Trust and Brand Equity Transfers to Sponsors – And We've Got the Data to Prove It!

In 2002 and 2005, PBS commissioned Harris Interactive and Total Research to conduct a survey to explore the impact of the PBS Brand on sponsors.

The results show that association with PBS had a measurable, positive impact on a sponsors brand image as reflected in quality perceptions.



# PBS KIDS: Most Highly Rated Among Parents



PBS KIDS Image Tracking Survey, Harris Interactive Market Research, August 2005, among parents with children ages 2-11.

\* Average rating on an 11-point scale where 10 = outstanding/extraordinary, 5 = quite acceptable, and 0 = poor/unacceptable

# PBS Helps Build Sponsors' Brands

## Quality Lift Results by Industry\*

Industry	AVG Quality Score Among All Respondents in Study	AVG Quality Score <b>Did Not Identify</b> Company as Sponsor on PBS	AVG Quality Score <b>Identified</b> Company as Sponsor on PBS	AVG Quality Lift	AVG % Lift
<b>Financial (5)</b>	<b>5.52</b>	<b>5.15</b>	<b>6.56</b>	<b>1.41</b>	<b>27%</b>
<b>Technology (4)</b>	<b>5.99</b>	<b>5.85</b>	<b>6.55</b>	<b>.70</b>	<b>12%</b>
<b>Energy (3)</b>	<b>5.69</b>	<b>5.52</b>	<b>6.16</b>	<b>.64</b>	<b>12%</b>
<b>Kids Targeted Goods (6)</b>	<b>6.41</b>	<b>6.23</b>	<b>7.43</b>	<b>1.20</b>	<b>19%</b>
<b>TOTAL AVG</b>	<b>5.90</b>	<b>5.69</b>	<b>6.68</b>	<b>.99</b>	<b>17%</b>

**PBS's quality score: 7.63**

\*Quality lift=quality score difference between those who have seen the corporation/brand sponsoring programs on PBS and those who have not (column 3 - column 2)



# In Other Words...

## You Can Do Well by Doing Good

The average quality score among companies that respondents identified as a PBS sponsor was **17%** higher than quality scores among those who were not recognized.

**...27%** higher for financial services companies identified as a PBS sponsor

**...12%** higher for technology companies identified as a PBS sponsor

**...12%** higher for energy companies identified as a PBS sponsor

**...19%** higher for kids targeted goods companies identified as a PBS sponsor