

LOCAL WATCH

PBS EDITION

MAY 2014

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

SUPPORT FROM VIEWERS LIKE YOU

WHERE WE LIVE IMPACTS HOW WE WATCH

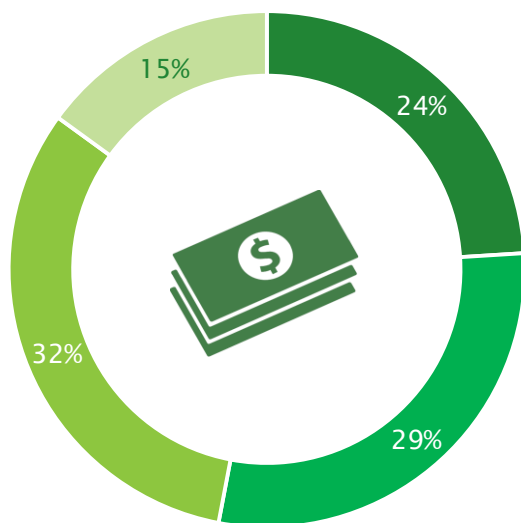
In today's world of seemingly endless ways to consume content, it is more important than ever to understand trends in media consumption from a local market perspective.

PBS has a unique position in the marketplace as a valued resource for educational material and entertainment. Like many other media outlets, PBS content can be accessed almost anywhere at any time. It is critical to better understand consumer behavior regarding where people are most likely connecting with PBS.

The Local Watch Report (PBS Edition) is designed to do just that. We hope you enjoy the cross platform insights we have compiled especially for our PBS clients and look forward to joining you at the conference!

The Nielsen Team

WHO ARE THE PBS MEMBERS?



● MILLENNIALS 18-29
 ● GEN X 30-49
 ● BOOMERS 50-69
 ● SILENT GENERATION 70 or older



INDEX

COMPARED TO U.S. ADULTS PBS MEMBERS ARE



25% MORE LIKELY TO BE AFRICAN AMERICAN

14% MORE LIKELY TO BE HISPANIC

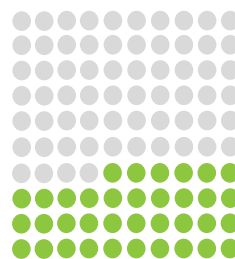
50%

PBS MEMBERS ARE MARRIED



HOWEVER....

SINGLES ARE **14%** MORE LIKELY TO HAVE DONATED \$35 DOLLARS OR MORE



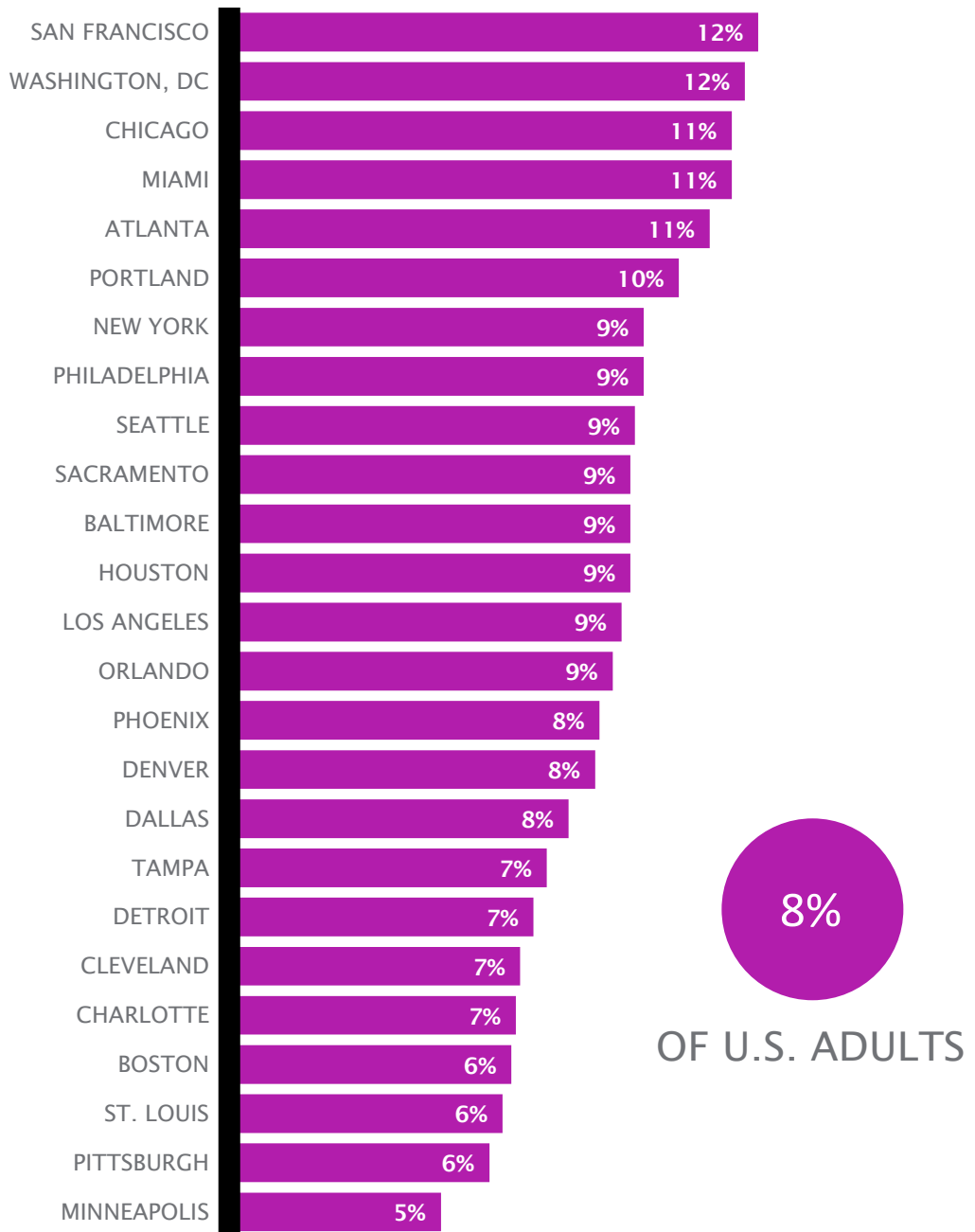
36%

PBS MEMBERS LIVE IN HOUSEHOLDS WITH CHILDREN

Source: Nielsen Scarborough USA+ R 2, 2013 (Aug 2012 – Sep 2013)

PBS MEMBERS = U.S. households who contributed \$35 or more to PBS TV in past year (Resp: 20,379)

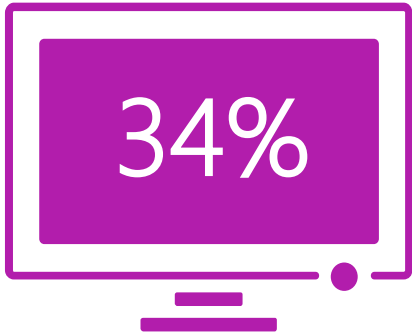
PERCENT OF DMA FOR MOBILE PBS MEMBERS



How to read: 12% of San Francisco are PBS Members who have a mobile device (Smartphone or Tablet)

Source: Nielsen Scarborough USA+ R 2, 2013 (Aug 2012 – Sep 2013)

U.S. households who contributed \$35 or more to PBS TV in past year AND own a Smartphone or tablet (Resp: 15,010)* Ranker based on top 25 LPM DMAs



PBS MEMBERS WHO OWN A MOBILE DEVICE REPRESENT 34% OF ALL WEEKLY PUBLIC TELEVISION VIEWERS

TRENDS AMONG PBS MEMBERS

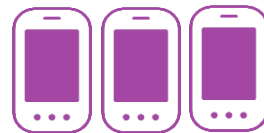


Smartphone ownership in PBS member households has almost tripled in the past three years allowing for the ability of instant access to content and messaging. This accessibility allows for current members to quickly and easily contribute whether that be from the wallet or by helping to create a growing social community of support.

MOBILITY AND SOCIAL NETWORKING SINCE 2010

SMARTPHONE OWNERSHIP

+190%



INTERNET SITES VISITED/APPS USED PAST 30 DAYS

+160%



TWITTER

+65%



FACEBOOK

+32%

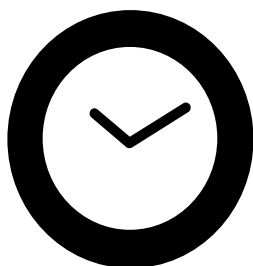
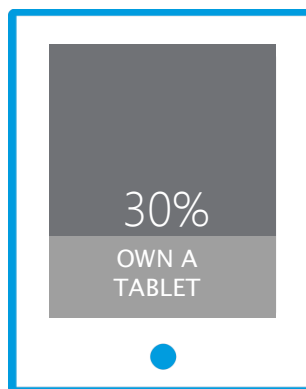
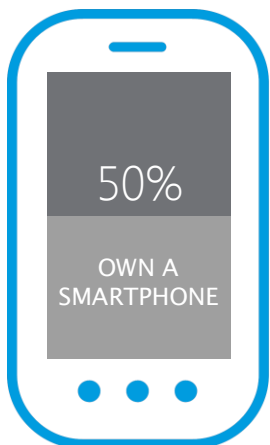


YOUTUBE

Source: Nielsen Scarborough USA+ R 2, 2013 (Aug 2012 – Sep 2013) AND Scarborough USA+ R2 2010 (Aug 2009- Sep 2010)

PBS MEMBERS: U.S households who contributed \$35 or more to PBS TV in past year (Resp: 15,010) Mobile Device = Smartphone or tablet

PBS MEMBERS MOBILE AND ONLINE ACTIVITY



30% OF PBS MEMBERS
SPEND 1+ HOURS SOCIAL
NETWORKING IN AN
AVERAGE DAY

INTERNET SITES VISITED/APPS USED PAST 30 DAYS BY PBS MEMBERS



FACEBOOK



YOUTUBE



21% MORE LIKELY TO
USE TWITTER



ONLINE PURCHASING
PAST YEAR

41% MORE LIKELY THAN THE AVERAGE
U.S. ADULT TO BUY CULTURAL
EVENT TICKETS ONLINE

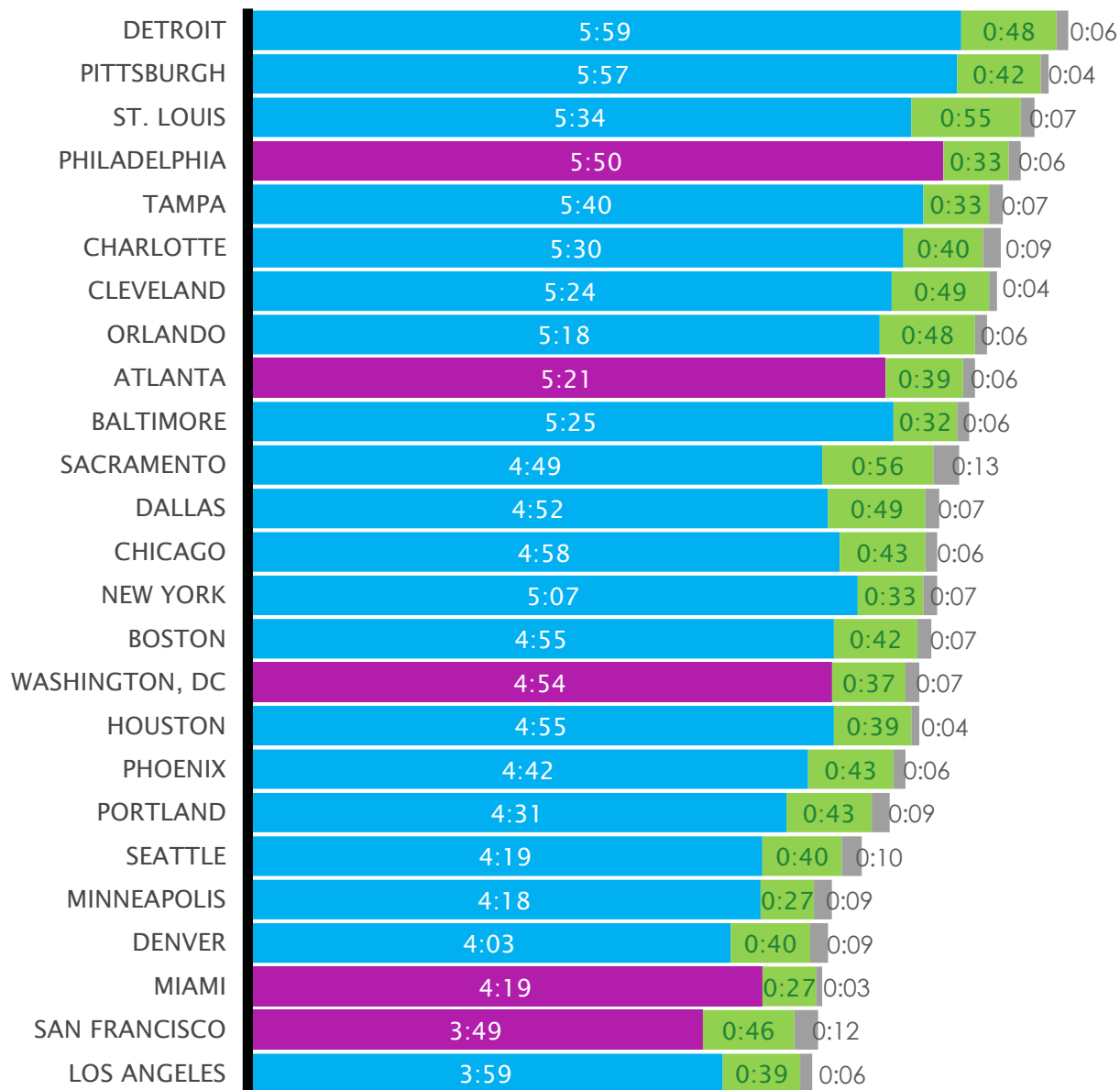
BOOKS



AVERAGE TIME SPENT PER DAY (HH:MM)

WHILE VIEWING IS INCREASINGLY FRAGMENTED, WE STILL MOSTLY WATCH LIVE TELEVISION

● LIVE TV ● DVR PLAYBACK ● OVER THE TOP STREAMING

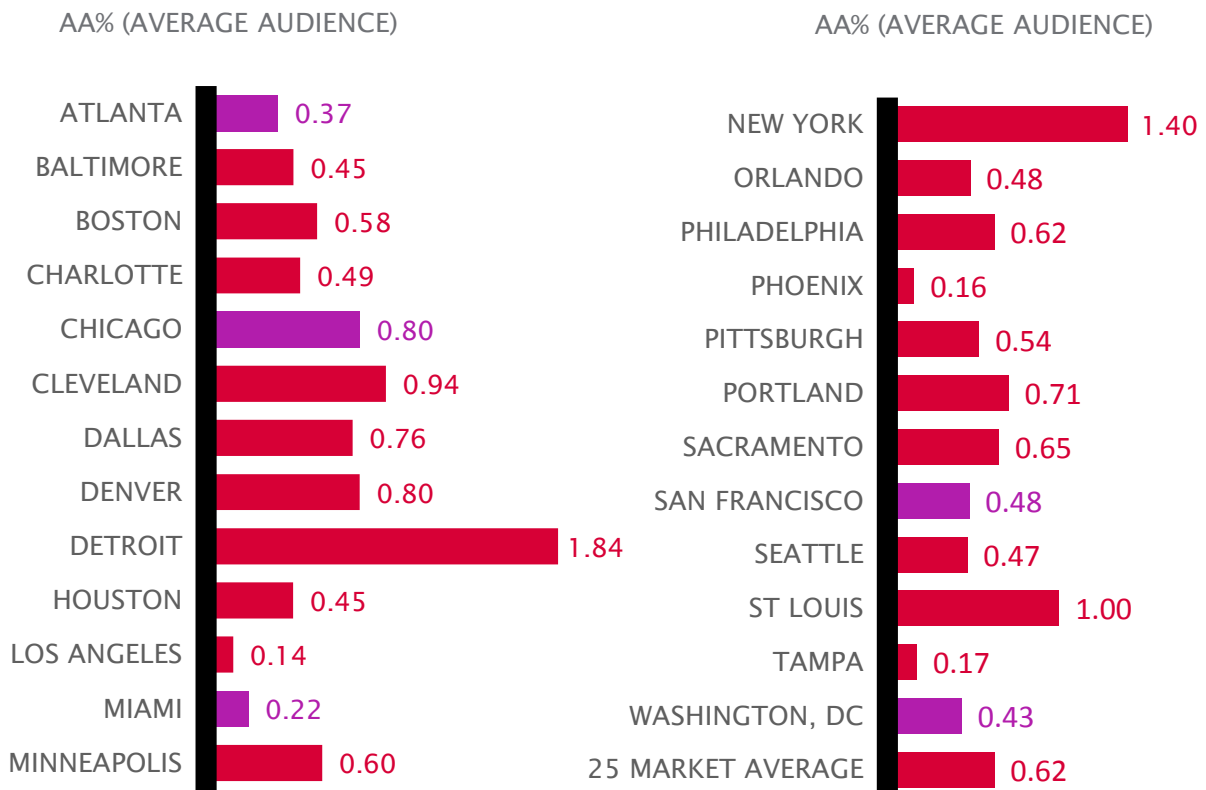


TOP 5 MOBILE PBS MARKETS SHADED PURPLE

TIMESHIFTING IN NON-DVR HOMES

As consumers become more aware of their on-demand options and media companies and distributors make more content available, timeshifting beyond the DVR continues to grow and becomes an opportunity.

TIMESHIFTING IS OCCURRING WITHOUT A DVR



TOP 5 MOBILE PBS MARKETS SHADED PURPLE

SMARTPHONE AND TABLET PENETRATION BY LPM MARKET

SMARTPHONE

77%	Los Angeles
77%	Dallas
77%	Houston
75%	Sacramento
75%	Miami
75%	Seattle
74%	Phoenix
73%	Atlanta
73%	Washington, DC
72%	Denver
71%	Boston
71%	Charlotte
71%	Chicago
71%	New York
71%	Philadelphia
70%	Baltimore
69%	Orlando
69%	Minneapolis
67%	St. Louis
67%	Tampa
66%	San Francisco
66%	Portland
65%	Detroit
61%	Pittsburgh
59%	Cleveland

TABLET

51%	San Francisco
50%	Washington, DC
49%	Atlanta
49%	Boston
44%	New York
43%	Chicago
43%	Sacramento
42%	Denver
41%	Portland
41%	Baltimore
40%	Detroit
40%	Orlando
39%	Tampa
39%	Los Angeles
38%	Philadelphia
37%	Cleveland
37%	Seattle
36%	Houston
35%	Minneapolis
34%	Dallas
33%	Miami
33%	Pittsburgh
32%	Charlotte
29%	St. Louis
29%	Phoenix

TOP 5 MOBILE PBS MARKETS SHADED PURPLE



ABOUT NIELSEN

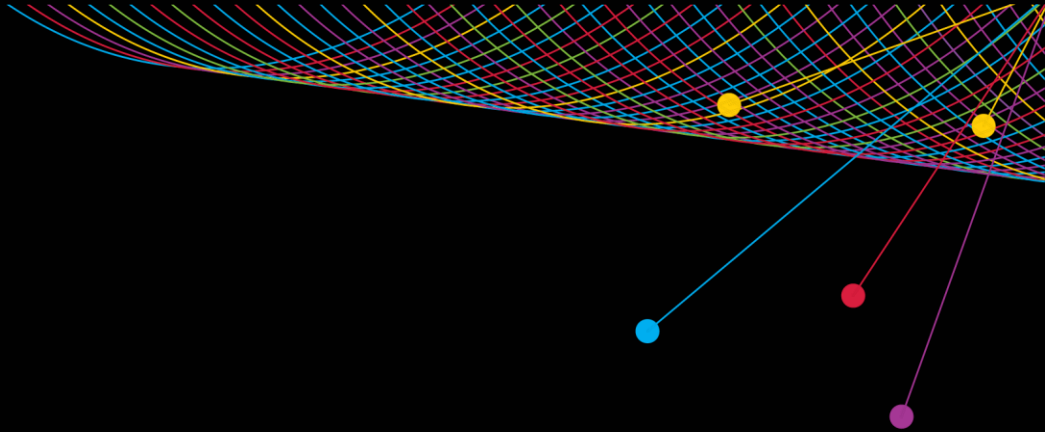
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