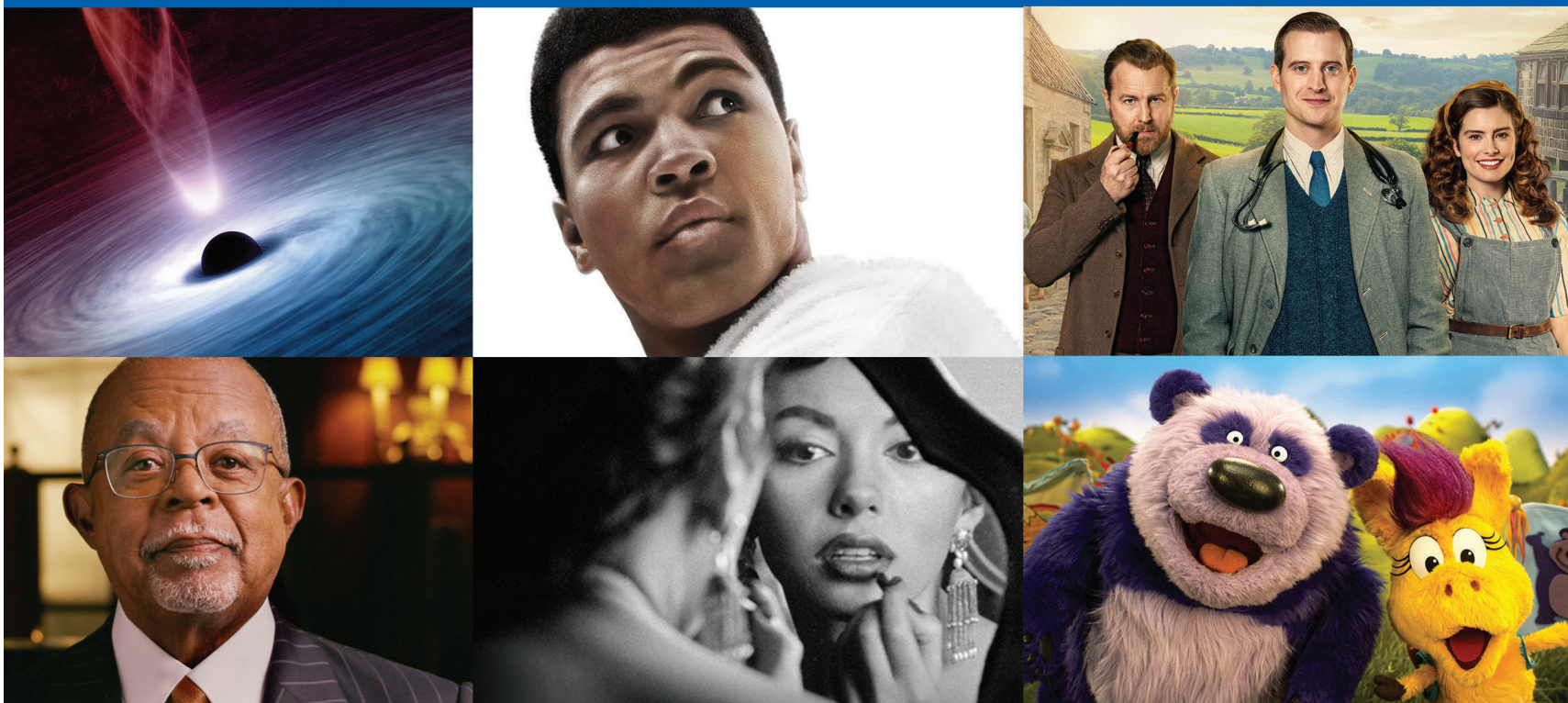




# Audience Insight 2021 Annual Report



AUDIENCE PROFILE  
SEPTEMBER 21, 2020 – SEPTEMBER 19, 2021

# OUR TEAM

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## A SPECIAL NOTE ON THIS EDITION

This edition of the Audience Insight book differs from prior editions, as it only contains PBS TV program data through February 2021. There are **no full-season program averages** due to an incident with the Nielsen national measurement system mid-season. Therefore, TV program ratings and reach on the following pages cannot be compared to prior full seasons. All included PBS and competitive **network-level (Time Period) data were accurately reported** based on the full 20-21 broadcast season and can be compared with historical data. Note: *Program data refer to actual program/episode averages, and time period data represent averages of anyone tuning to PBS in a particular daypart.*

Beginning with Daylight Savings Time, PBS began to notice an issue that impacted national program ratings. PBS and Nielsen worked diligently to uncover the root cause of the issue. It was determined there was an incorrect setting on the encoder clocks. The settings misaligned PBS programs with the audience data Nielsen was reporting. The issue was corrected on August 16, 2021, and all ratings from that date forward have been reported accurately. It is important to note that this issue only impacted program ratings, and time period and local ratings were never affected.

Since the error was corrected, PBS has been working closely with Nielsen to have the affected program ratings updated to accurately reflect program viewership. Unfortunately, this process has been more complicated than PBS or Nielsen could have predicted. As of this writing, we are still in the process of testing a method that most accurately reflects PBS viewership during this period. This incident has again highlighted the complexity that comes from PBS being measured as a syndicator. PBS cannot be measured by Nielsen like a traditional broadcast network or cable provider due to the freedom local stations have in determining their schedules. This incident has provided an opportunity for PBS to develop an even deeper understanding of the complexities of this unique measurement method and implement procedures and software to ensure it never happens again.

For more information, please feel free to contact Dan Haggerty ([ddhaggerty@pbs.org](mailto:ddhaggerty@pbs.org)).

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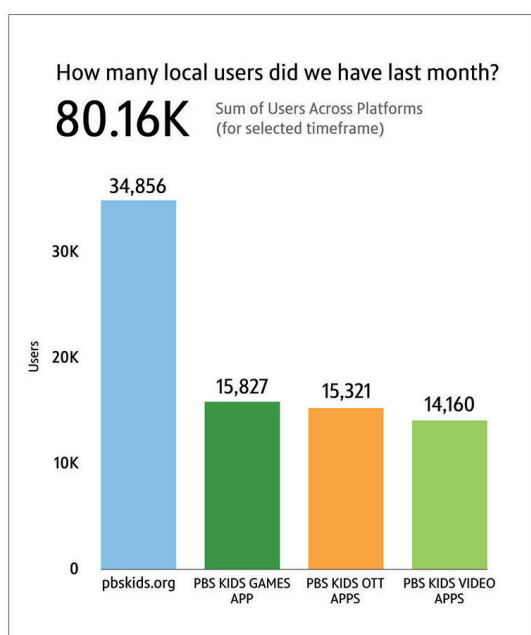


A repository of data, insights, reports and webinars can be found on The Hub:

<https://hub.pbs.org/business-intelligence/homepage>

with sections specifically featuring:

- General Audience
- Children's Media & Education
- Passport
- Sponsorship & Fundraising
- An archive of previous Audience Insight editions
- Domo resources, including previously recorded webinars and trainings



Discover in-depth information about your local General Audience, PBS KIDS, LearningMedia and Passport digital audiences with the Local Analytics Dashboards, powered by Domo ([pbs-org.domo.com](https://pbs-org.domo.com)), including consistently updated, interactive cross-platform data about:

- Users
- Video streams
- Engagement
- Trends
- Geographic insights
- Station comparisons
- And more



# A MESSAGE FROM AMY SAMPLE

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PBS Business Intelligence is pleased to present you with the 10th annual Audience Insight report. The broader media landscape has shifted in a multitude of ways since that first publication, some expected and some very unexpected. In this year's edition, we examine where audiences are today and where they may be tomorrow (pg. 7-9), developments in the SVOD and AVOD spaces (pg. 10-11), the state of PBS KIDS (pg. 35-43), as well as PBS's impact on diverse audiences (pg. 20).

COVID-19 continued to shape the media landscape during the 2020-21 season. Changes in media consumption habits, already shifting at a rapid pace pre-pandemic, have accelerated even faster over the past two years, and these changes appear to be here to stay. The initial upward trend in live linear TV consumption during the first few months of the pandemic abated, and the steady erosion we've seen in recent seasons resumed. Broadcast and cable ratings have continued to decline; news consumption, one of the bright spots in 2020, has fallen by a third over the past year as many seek an escape from constant tumult. This overall drop for live television has been mitigated by the return of sports and other live events.

Digital streaming continues to be a bright spot as domestic viewers continue to flock to various streaming services. As the number of services available grew, so did the average number of subscriptions per household, climbing to nearly nine by the end of the year. This contributed to a 22% increase in total hours of OTT content watched in 2021. Interestingly, smaller services are experiencing the most growth as the rapid expansion by the streaming behemoths in the space (Netflix, Hulu, Disney+, YouTube, Amazon Prime, HBO Max) begins to settle.

PBS finished the season ranked 8th in Primetime among all broadcast and cable networks, swapping places with CNN, which continued to benefit from heightened interest in political commentary in recent seasons. But most networks felt the sand shifting under their feet, as the linear audience sought out more ways of viewing. Among the top 30 networks, household ratings declined by an average of 10%. PBS's Primetime rating fell 15%, and monthly linear reach fell below 50 million for the first time. PBS digital users accounted for an average of 18 million per month, steady year-over-year. This represents a challenge, and Business Intelligence is committed to providing the insights necessary to bring PBS into the future.

Passport continues to grow, bolstered by the strength of *All Creatures Great and Small*. All Creatures also helped propel "Become a Member" clicks across platforms. *The Black Church* proved to be a cross-platform success, setting new PBS YouTube streaming records. Elsewhere, the PBS KIDS Livestream experienced its highest streaming levels during this past year. The PBS Livestream continues to grow since the service debuted and new distribution options became available on both connected TVs and DIRECTV.

We hope that you will use this book as one part of your decision-making toolkit and as a helpful guide to understanding the behaviors of the PBS audience. As always, we welcome your feedback and look forward to working with you in the coming year.

Amy Sample

Vice President, Business Intelligence

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# 01

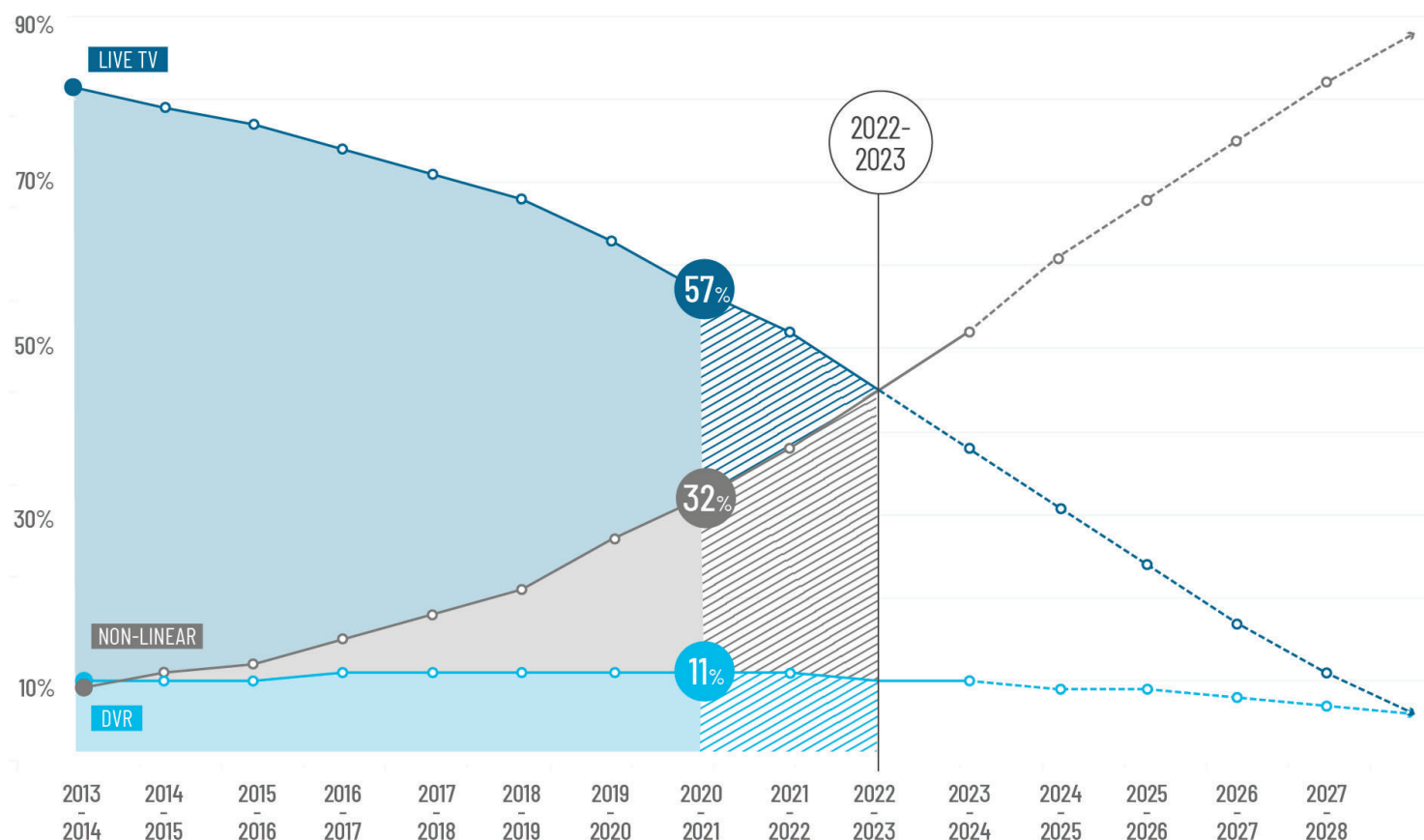
## THE MEDIA LANDSCAPE

The television industry continued to put forth an increasingly large menu of ways for viewers to watch programming in 2020-21, placing more and more power in the hands of consumers and continuing to push traditional, linear TV to the side. As the number of services that the average US TV household subscribes to grew over the past season, so did the total hours spent with those services. In 2021, 75% of consumers watched their favorite show using an online source. And throughout the year, consumers on average spent over three hours watching traditional, linear TV each day, whereas they watched nearly 2.5 hours of digital video. By 2023, those numbers are projected to be nearly equal, with linear expected to only have an 8 minute advantage over digital.

PBS's traditionally slow to adopt audience seems to be catching up to the rest of the TV universe's appetite for streaming. Viewers under 50 are tuning in to linear content less and less, and PBS is losing value in this cohort's consideration set. This leaves an older, less diverse demographic group that prefers a more narrow concentration of programming that will consume more than 75% of PBS's Primetime linear minutes.

Maintaining PBS's position as a valued resource for all will require imagination and innovation as we strive to meet all our audiences with the content they enjoy and on the platforms they prefer..

### CONTRIBUTION OF SOURCES TO OVERALL PRIMETIME VIEWING



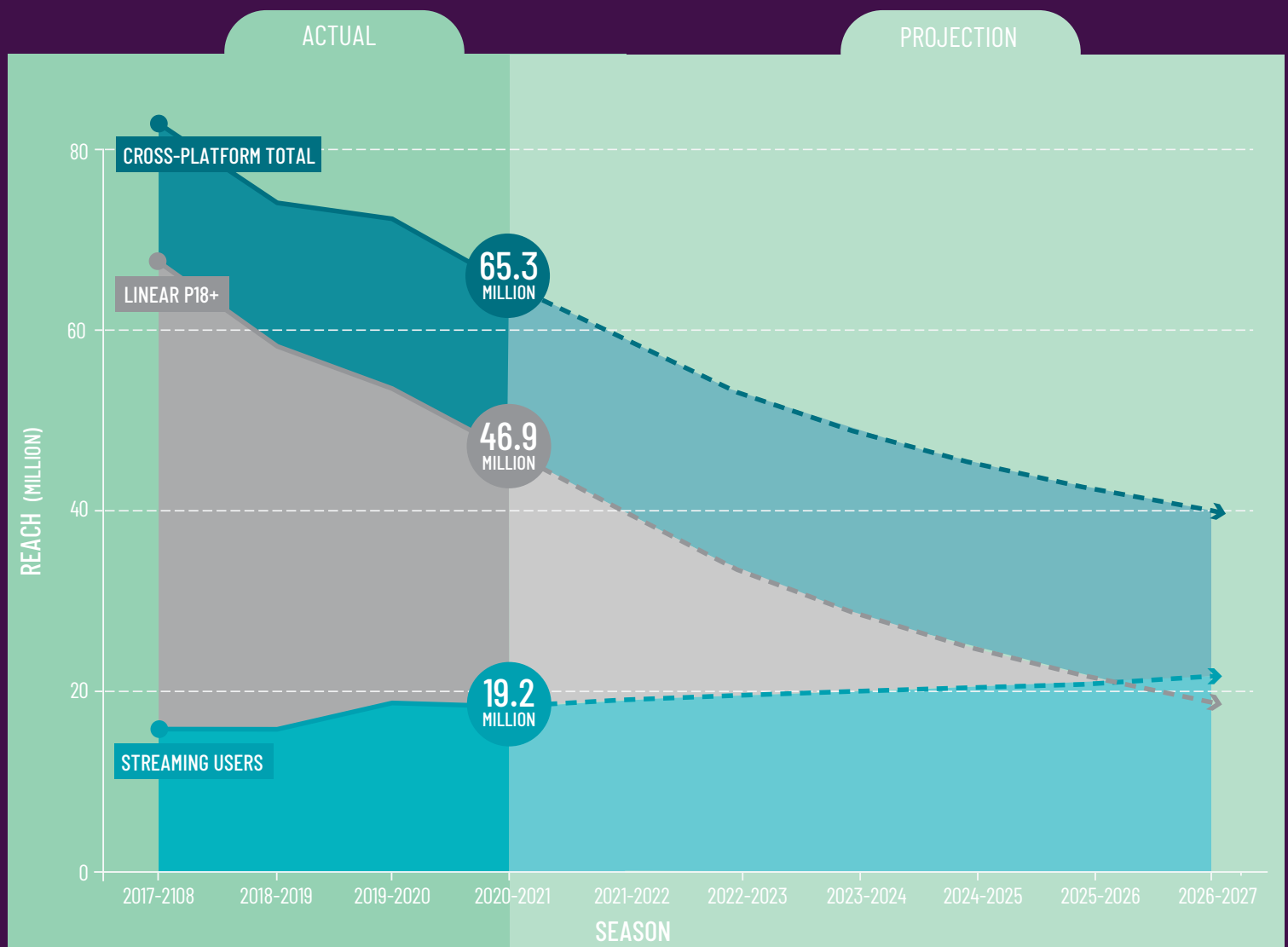


# THE EVOLUTION OF TV

The concept of “watching TV” has changed, and PBS is beginning to feel the impact that the media industry has felt for nearly a decade. Viewers are watching less programmed linear TV and increasingly streaming what they want and when they want to view.

## PBS MONTHLY REACH PROJECTION

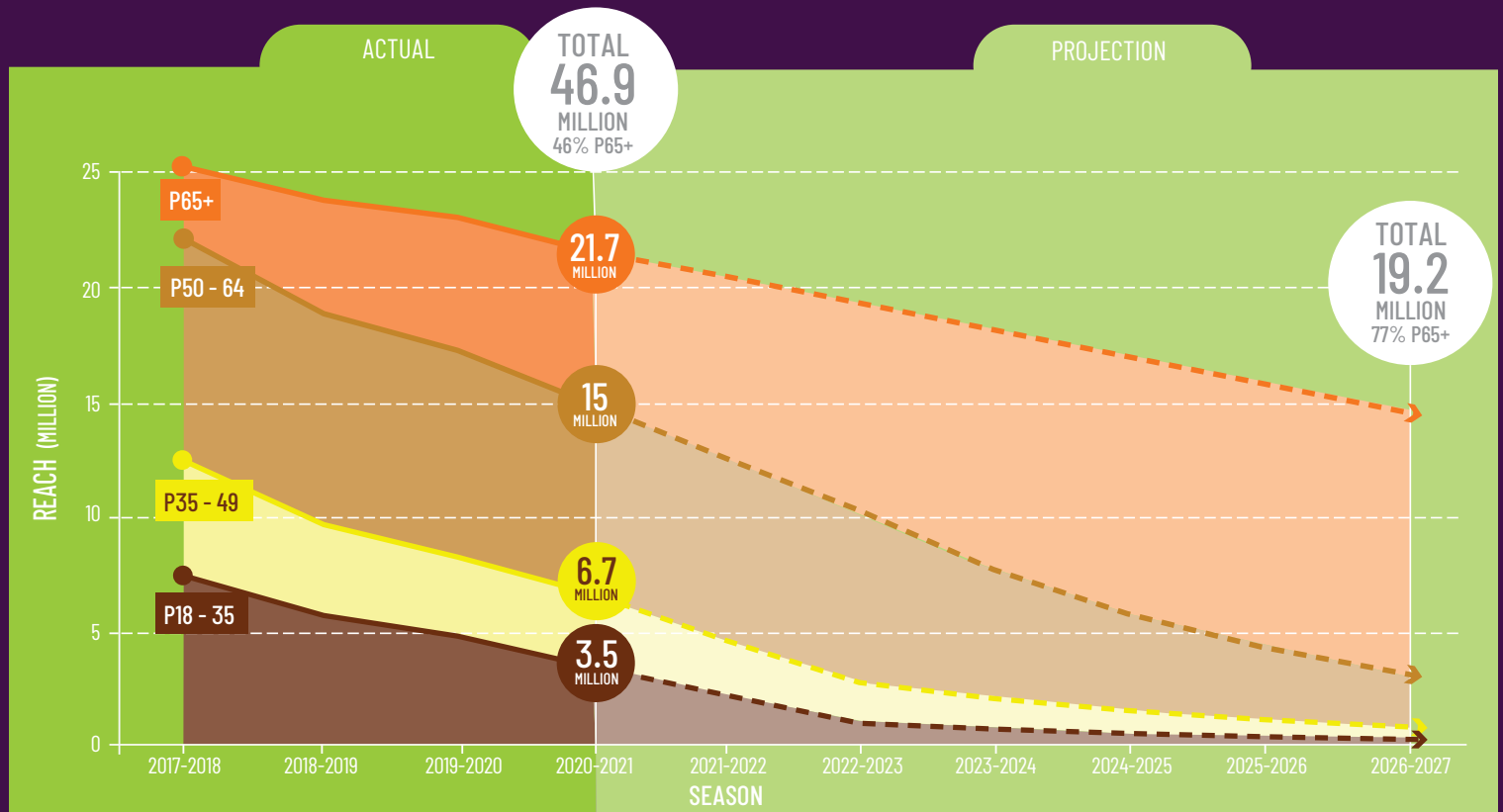
PBS’s reach on traditional television is falling rapidly. Though our digital user base on our current platforms continues to grow, these gains will not offset linear declines.





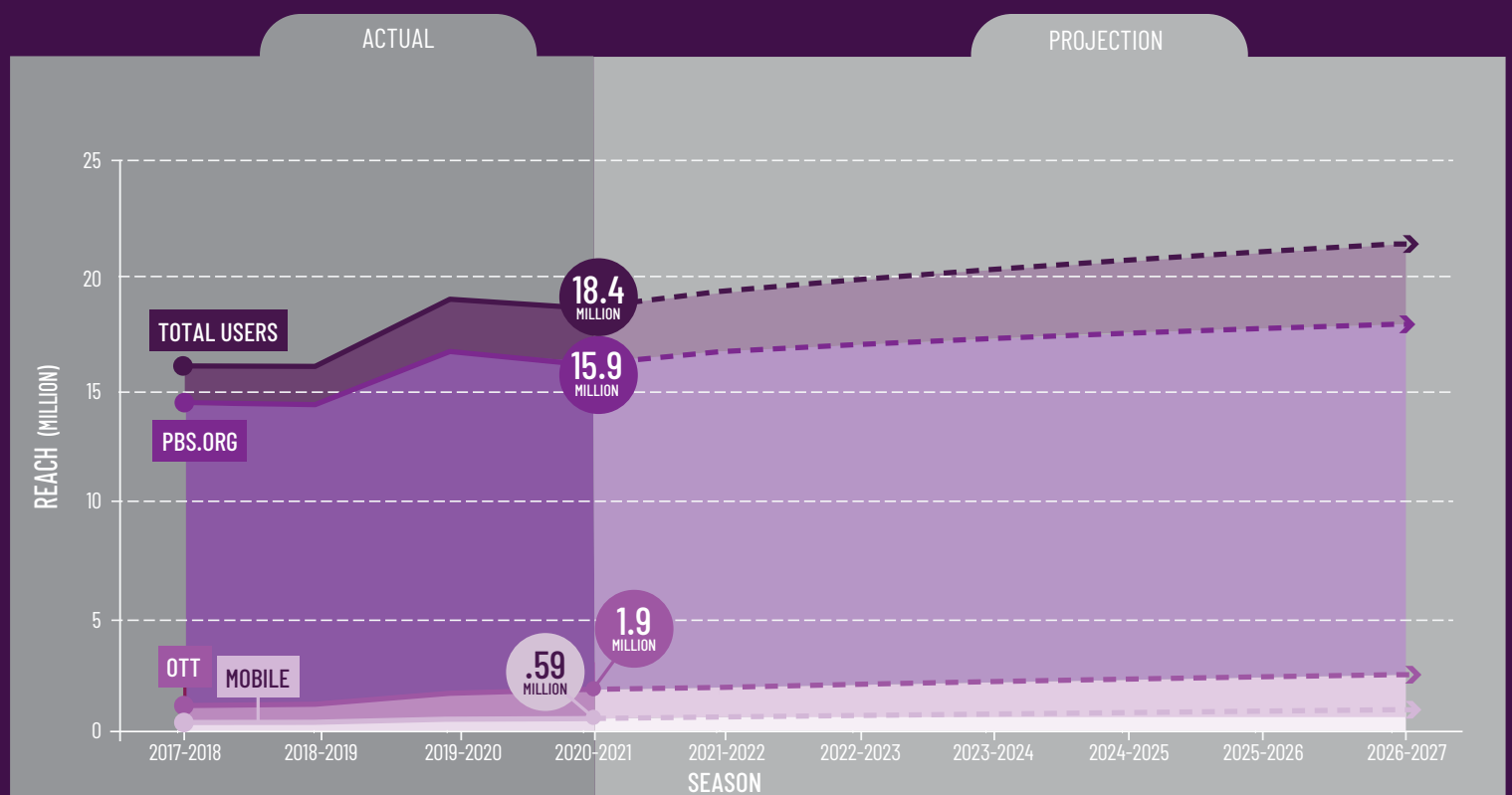
# PBS LINEAR REACH PROJECTION BY AGE

Viewers under the age of 50 are leaving PBS's linear service the fastest, such that, at the current trajectory, by 2026 the vast majority of our viewers will be over 50.



# PBS DIGITAL REACH PROJECTION BY PLATFORM

Over the next five years, streaming users on our owned platforms are projected to grow by a modest three million users.

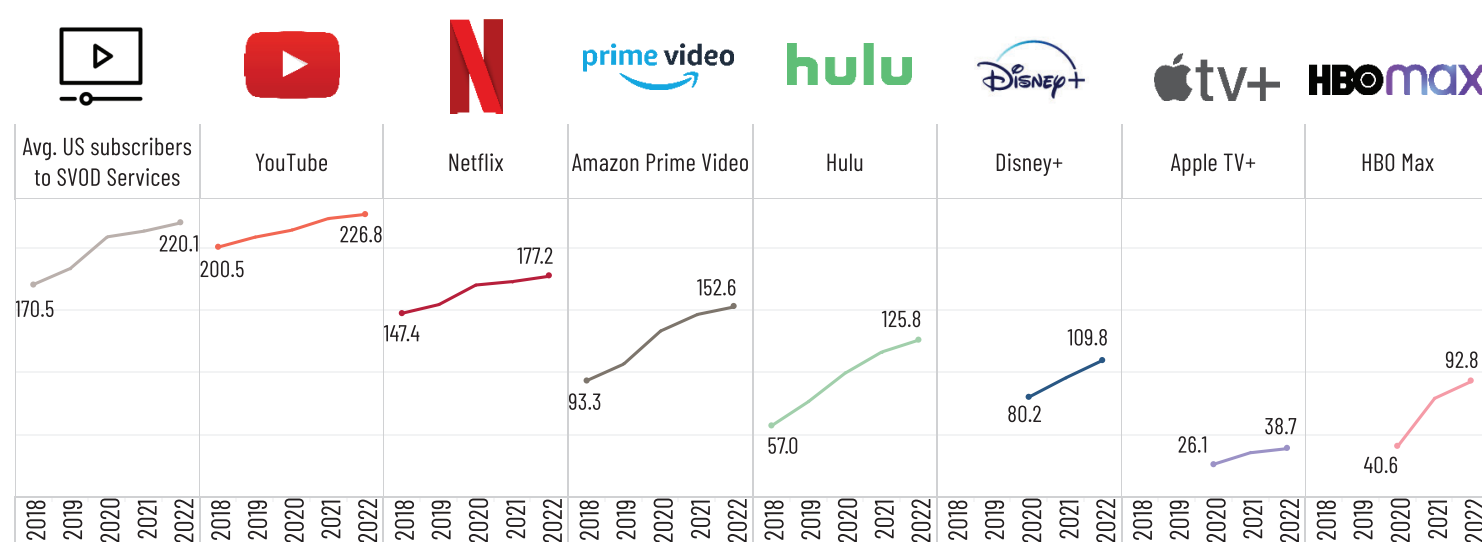


# SUBSCRIPTION VIDEO SERVICES

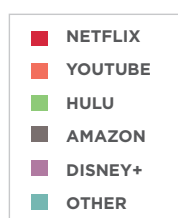
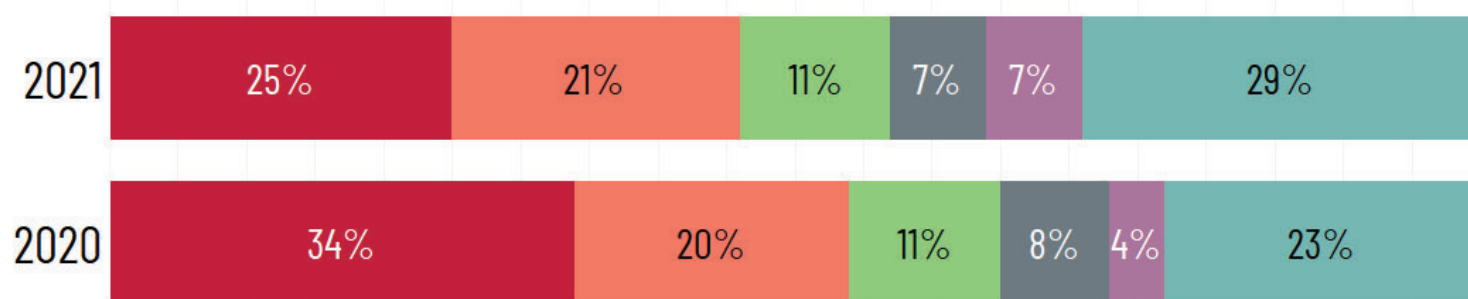
Two years into the pandemic, the average consumer watched over 81 minutes of Subscription Video on Demand (SVOD) content per day, up +10% compared to 2020. These gains were largely driven by the strong growth of HBO Max during its first full year of service. The platform garnered over 79M viewers in 2021, nearly double from the prior year. With more paid TV subscription choices than ever, 59% of consumers watched content on at least two SVOD services..

## STREAMING VIEWER TREND AND FORECAST

US OTT VIDEO VIEWERS BY PROVIDER, IN MILLIONS

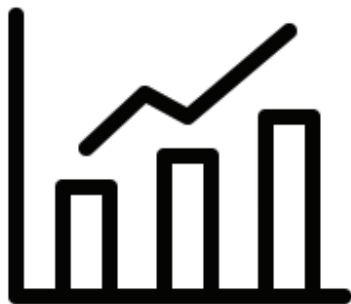
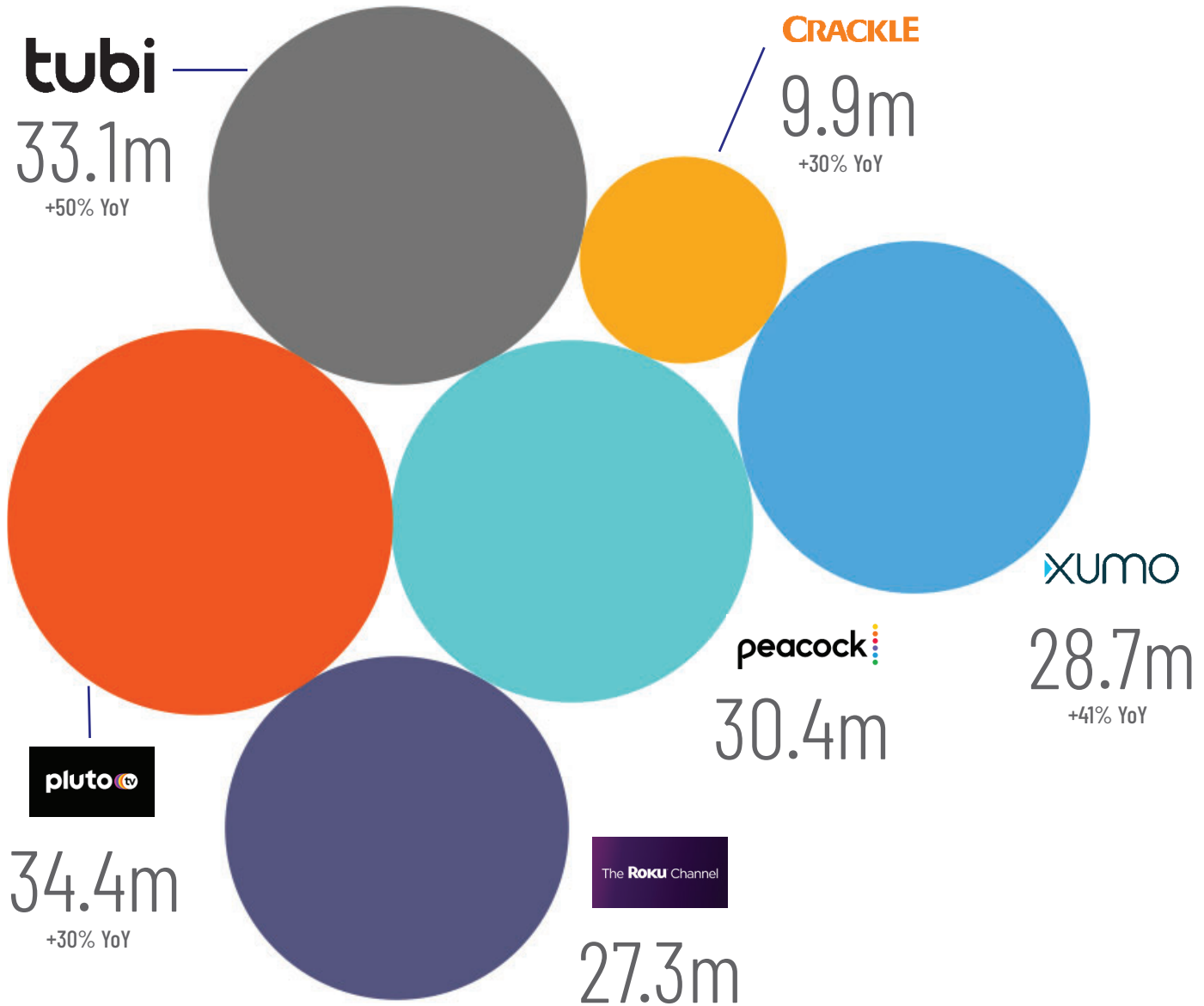


## VIEWER STREAMING BY BRAND



For the first time, the 'Other' bucket is the top streaming category, driven by substantial growth from Ad-supported Video on Demand (AVOD) and Free Ad-supported Television (FAST). Despite these gains, YouTube also grew year-over-year and now accounts for over one-fifth of viewer streaming, trailing Netflix by only four percentage points.

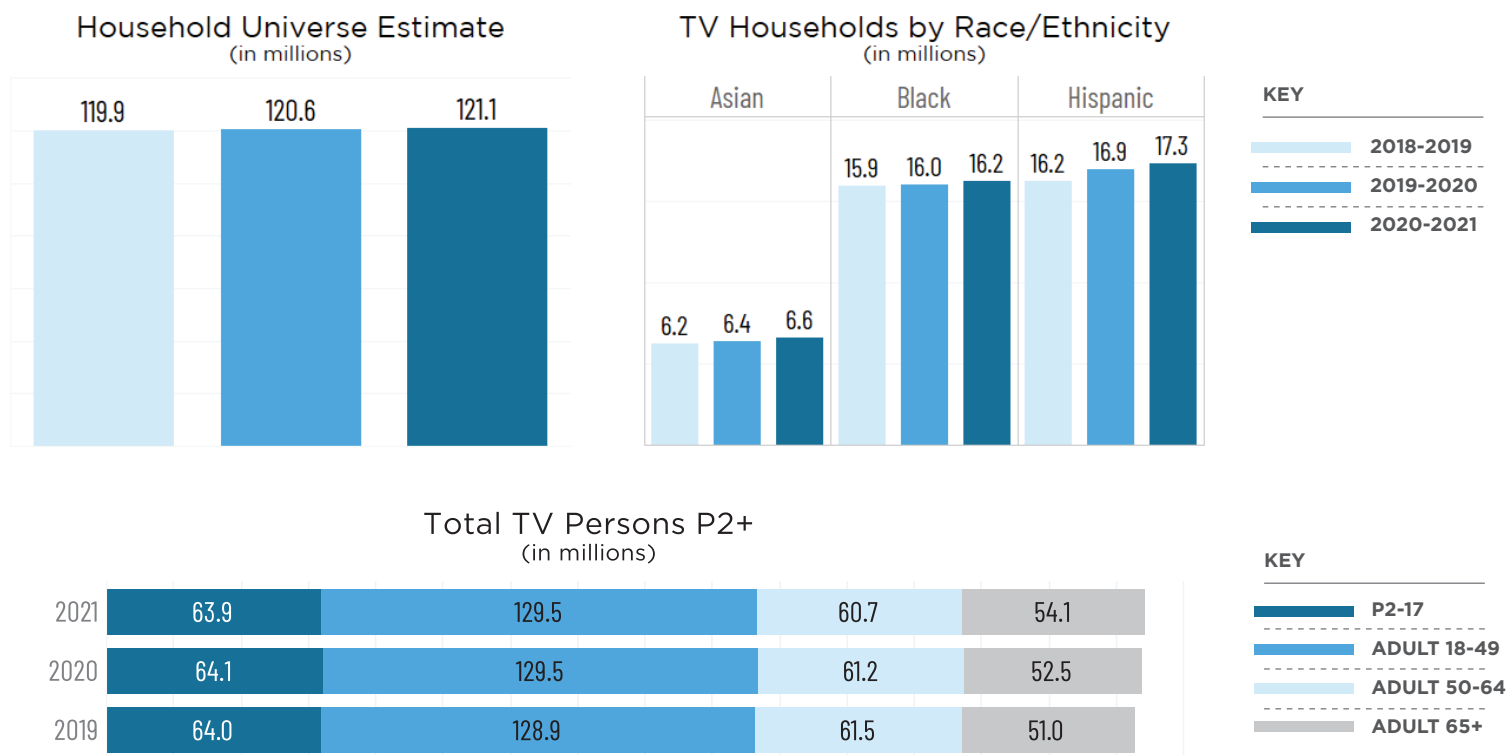
# AVOD USERS IN 2021



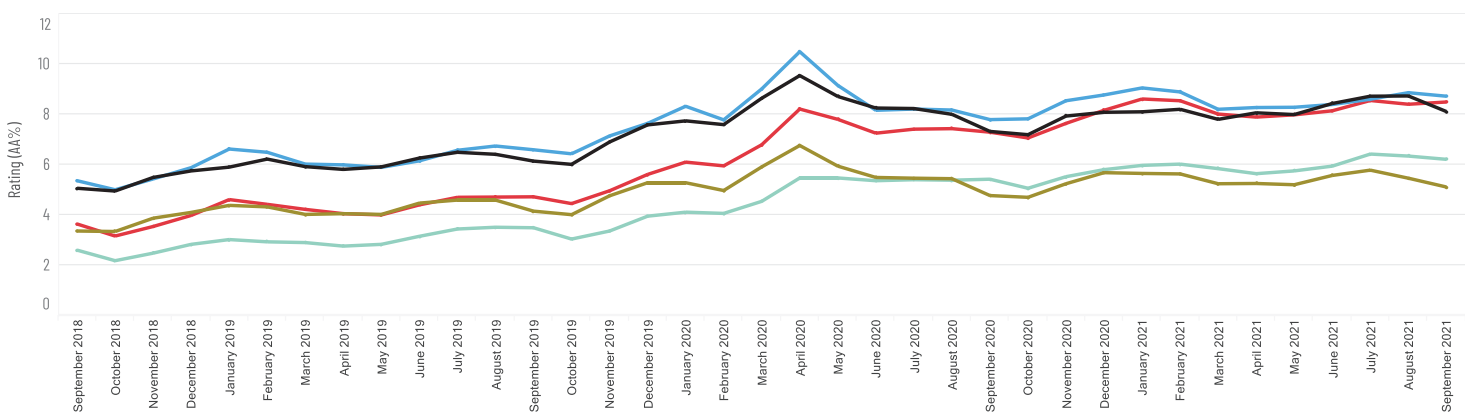
Ad-supported Video on Demand (AVOD) has continued growing and is projected to have nearly 128M viewers by the end of 2021. While annual gains are expected to slow in the coming years, more than half of US digital viewers already use AVOD.

# MEDIA LANDSCAPE

## US POPULATION TRENDS



## PRIMETIME TUNING TO OTT DEVICES



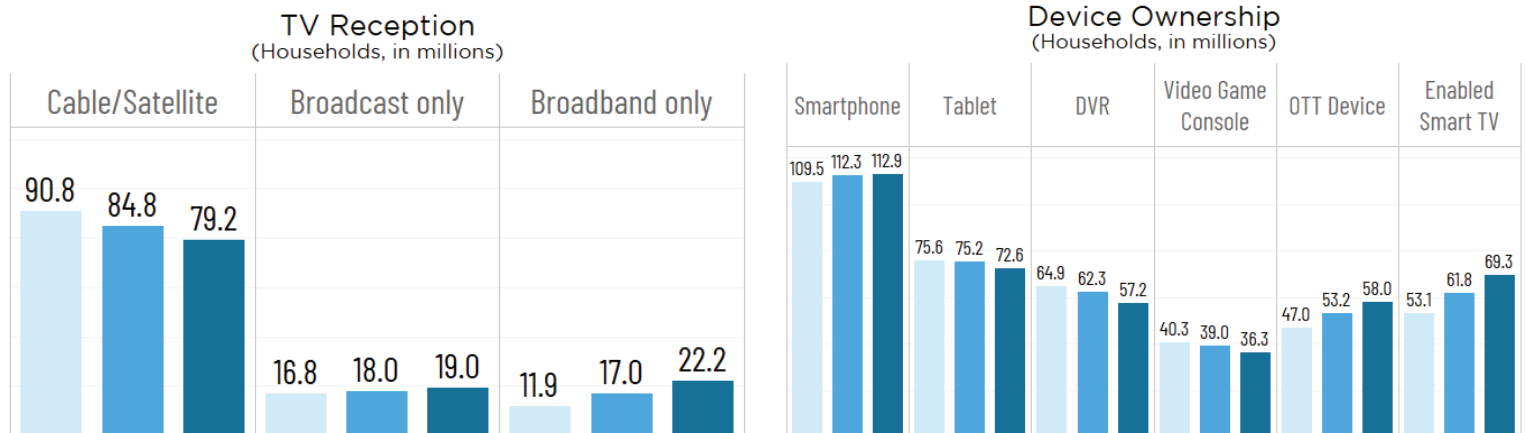
The number of TV households increased year-over-year, with increases across each Hispanic, Black, and Asian homes. While the number of homes increased, the total number of TV viewers 2+ dipped, with the largest decline among Adults 65+ (-3%).

Following the spike in OTT streaming in the spring of 2020, due to the onset of the pandemic, the slow and steady gains in streaming have continued at pre-pandemic rates for most demographics. However, the March 2020 bump in streaming among Adults 65+ persisted, with streaming among this demographic now outpacing Teens.

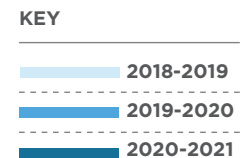


# MEDIA LANDSCAPE

## TECHNOLOGY TRENDS

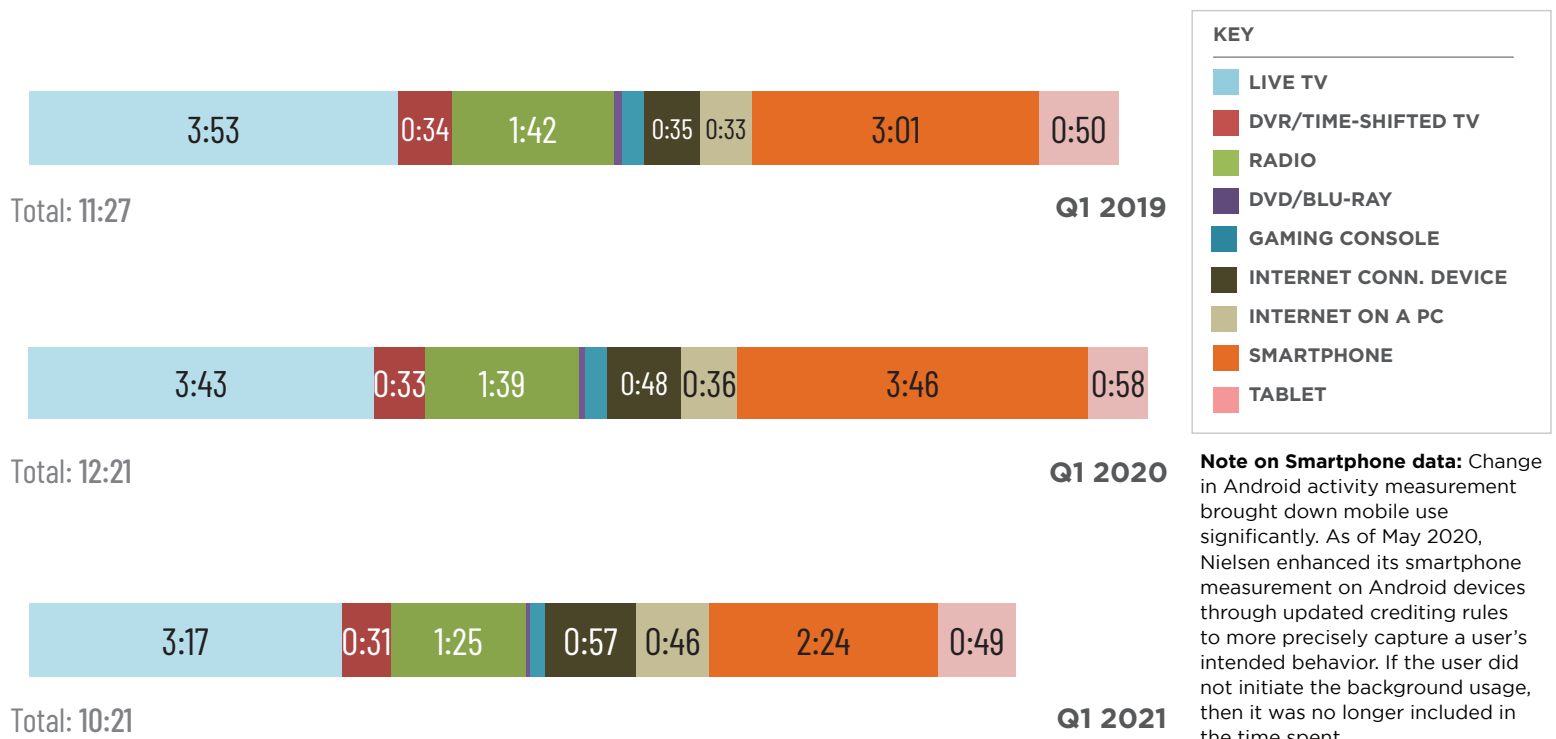


“Broadband Only” homes, or homes that have a TV but no antenna or cable subscription, jumped 31% from last season. The continued growth of this contingent, which watches TV content exclusively via streaming, underscores the importance of expanded digital distribution for PBS programming. Overall media usage continued to increase, driven by time spent on mobile devices (which surpassed live linear TV last season).



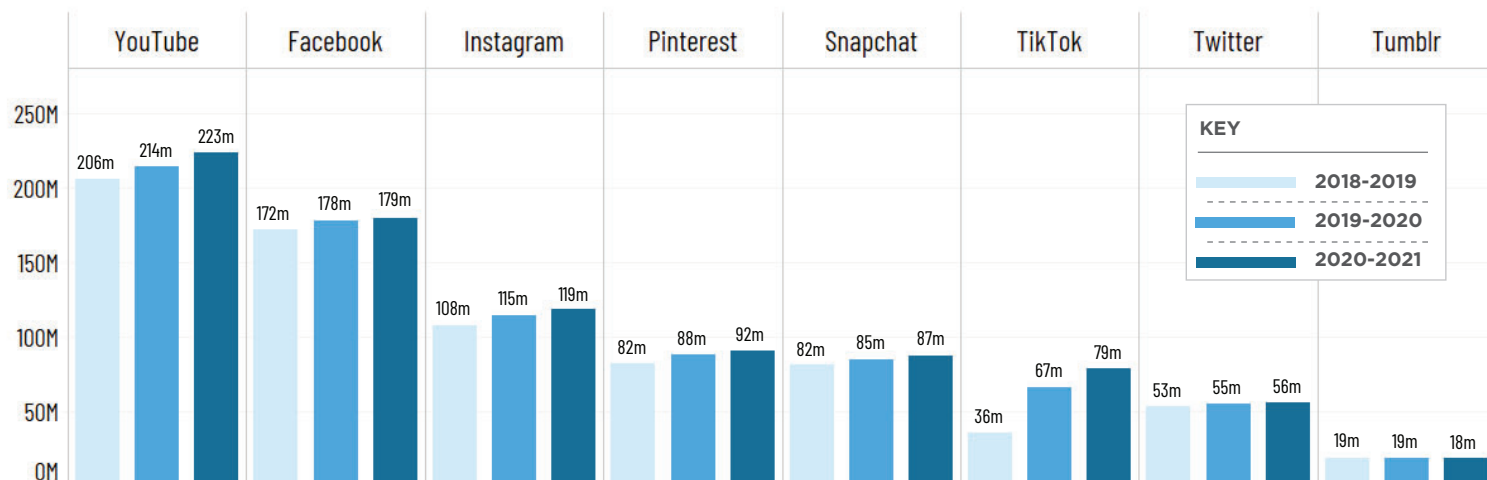
## DAILY TIME SPENT USING MEDIA

PERSONS 18+, HOURS:MINUTES



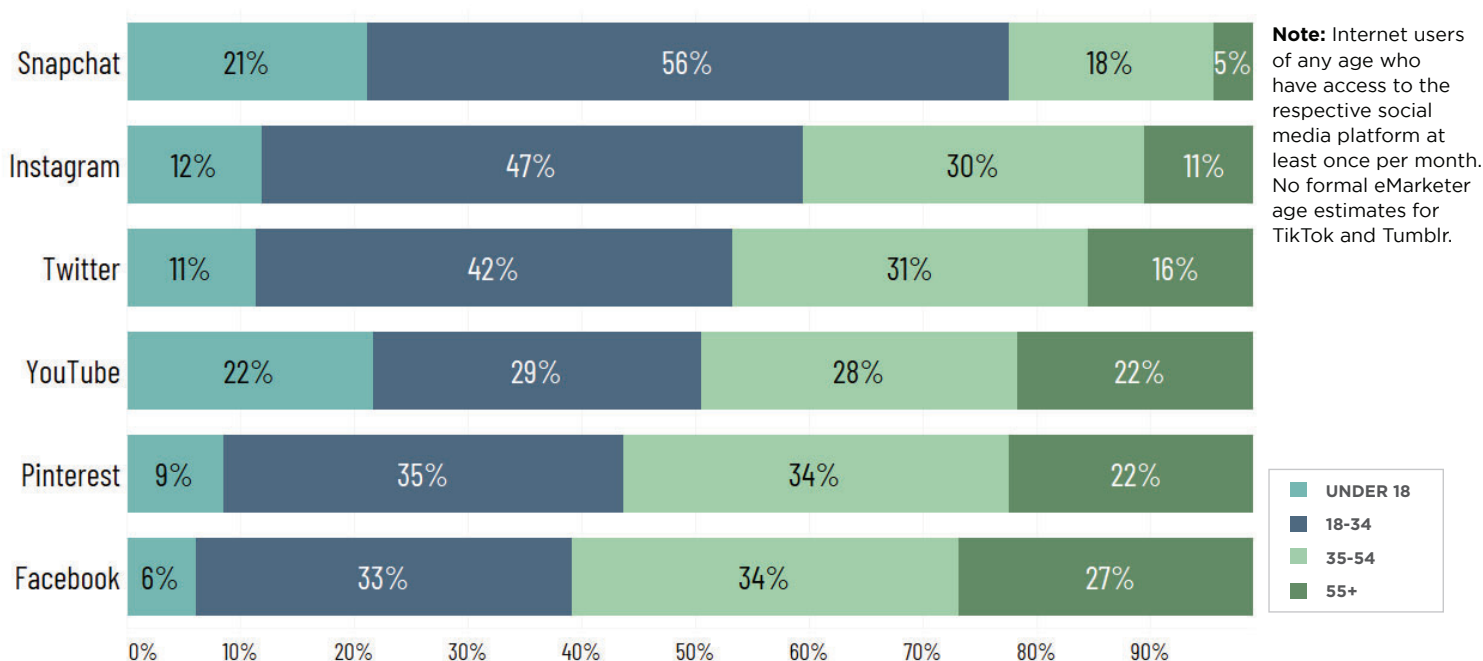
# SOCIAL MEDIA TRENDS

## US SOCIAL NETWORK USERS BY PLATFORM, THREE-YEAR TREND



The number of US social media users increased throughout 2020, but this growth slowed during the second year of the pandemic. However, there were still over 217M users in 2021, covering nearly 74% of the country's internet base. These gains were driven by older age groups, with users aged 65+ up nearly 5% year-over-year. Younger generations were driven to new platforms like TikTok, which is expected to surpass 100M monthly users by 2025.

## US SOCIAL NETWORK AGE DISTRIBUTION BY PLATFORM











PBS NEWSHOUR

NATURE



MASTERPIECE



FRONTLINE

NOVA



ANTIQUES  
ROADSHOW





# 02

## GENERAL AUDIENCE OVERVIEW

PBS reached an average of 65 million cross-platform viewers per month in 2020-21, down from 72.5 million just a year prior, a drop of 10% which was entirely among linear viewers. Digital users hovered around 18 million per month, on par with 2019-20 levels. Big 4 broadcast network-sized reach has always been a hallmark of PBS. However, with rapidly declining linear viewership, and slow to modest growth in digital viewing, holding on to that reach will be a major challenge.

PBS's Primetime household rating fell below a 1.0 for the first time this season, landing at a 0.98, down 15%, and ranked 8th among all broadcast and cable networks. This was down one place from last season, as CNN jumped up a notch on 3% year-over-year growth, one of a very few networks that were able to find more linear viewers. NBC landed on top once again, on the seemingly insatiable appetite for NFL football. CBS ran second, ABC third. Fox News was the highest rated cable network, followed by MSNBC, though both experienced greater than average declines during the season, as fatigue of political discourse, post-election, seemed to be setting in.

While PBS's average Primetime audience is less culturally diverse than the US overall, targeted programming like *The Black Church* or *Muhammad Ali* proved to be very successful at attracting a broader set of viewers. February's *The Black Church* was PBS's second-highest rated telecast among Black adults ever and became Skip Gates' most-streamed series to date. September's four-part *Muhammad Ali* reached more Black viewers than any previous Ken Burns series. The challenge remains in finding a way to serve the interests of these audiences on a continuous basis. Compounding this challenge is that multicultural viewers, particularly younger ones, are leaving linear TV even faster than viewers overall. Looking beyond our current boundaries will be crucial to maintaining the strong connection PBS has always had with all of our viewers.

As stated in the "Special Note," Primetime ratings for the season were only available through February 2021, which is why full season averages are not available. Nevertheless, the return of beloved legacy series *All Creatures Great and Small* in January 2021 was the blockbuster that everyone hoped for, posting the season's highest ratings. But Primetime wasn't the only place the series shined.



Passport, PBS's member benefit streaming service, found new heights in 2020-21, driven by new and returning dramas. The premiere season of *All Creatures Great and Small* set new records for Passport membership and viewing, generating the most per-episode streams of any Passport series up to date. Furthermore, July 2021's return of *Unforgotten* and new sleeper hit *Professor T* helped that month eclipse January as the top month for Passport streams and users over the past three years, garnering more than 6.3M video plays and nearly 811K users.

# PBS CROSS-PLATFORM VIEWING

## GENERAL AUDIENCE





OWNED PLATFORMS

PLATFORM	AVERAGE MONTHLY USERS	ROLE	INSIGHTS
 <b>LINEAR PRIMETIME</b>	<b>48.8</b> MILLION	 <b>BROADCAST REACH</b>	Linear broadcast television remains the largest source of PBS general audience viewers, despite a 13% decline in average monthly reach year-over-year as audiences shift to digital platforms.

 <b>PBS.ORG</b>	<b>15.9</b> MILLION	 <b>DIGITAL FLAGSHIP</b>	PBS.org continues to lead PBS's owned digital platforms in average monthly users, which were down 3% year-over-year after growing 16% during the first year of the pandemic (2019-20). Despite the small annual declines, PBS.org's users are still up 12% compared to the last pre-pandemic season (2018-19).
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 <b>PBS VIDEO APP</b> <b>VIDEO APP: OTT</b>	<b>1.8</b> MILLION	 <b>MAXIMIZING STREAMING ENGAGEMENT</b>	While PBS's owned OTT user base is relatively small, it's a highly engaged platform, garnering the majority of Passport and non-Passport streaming among PBS's owned platforms. Its users were up 10% season-over-season, the highest annual gains among PBS's owned platforms.
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 <b>PBS VIDEO APP</b> <b>VIDEO APP: MOBILE</b>	<b>595</b> THOUSAND	 <b>MEETING AUDIENCES WHERE THEY ARE</b>	While the mobile app garners the least amount of users among PBS-owned platforms, its users grew slightly season-over-season (+4%). This was driven by streaming gains of +56% compared to last year.
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 <b>GENERAL AUDIENCE: YOUTUBE</b>	<b>18.1</b> MILLION	 <b>EXPERIMENTING WITH NPS CONTENT</b>	PBS's General Audience (non-KIDS, non-Digital Studios) accounts on YouTube experienced modest season-over-season monthly user declines (-11%). However, the accounts proved to be a reliable way to garner large amounts of views relatively quickly (see Ali special page). Despite falloff in average monthly users, these accounts had gains in both engagement (+25%) and views (+15%) from last year.
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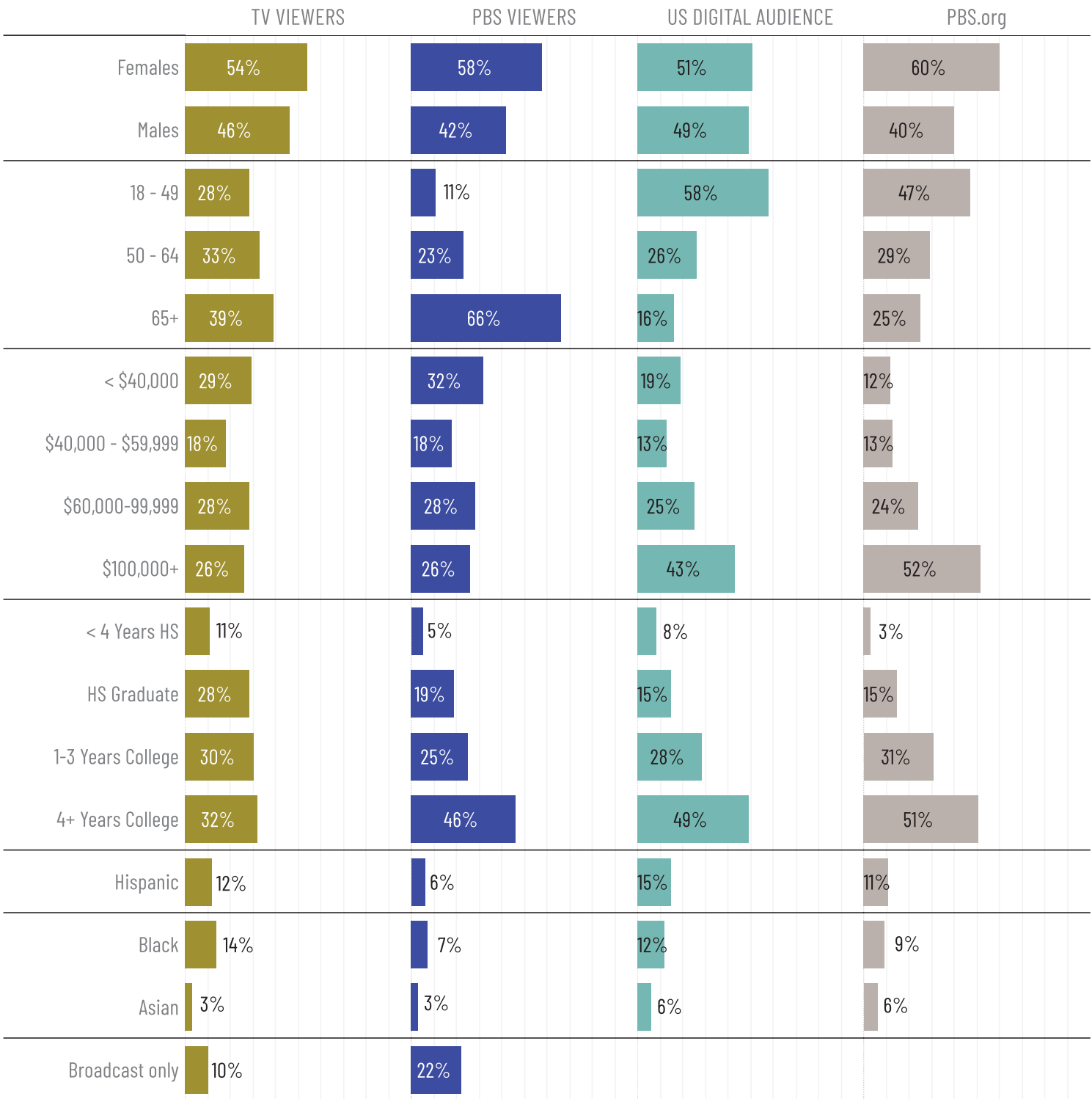
NON-OWNED PLATFORMS

 <b>DIGITAL STUDIOS</b>	<b>14.9</b> MILLION	 <b>CULTIVATING A NEW FAN BASE</b>	Average monthly YouTube Digital Studios users fell significantly season-over-season (-35%), driven by declines in followers (-17%) and views (-5%). Despite these declines, average monthly engagements were up 5% compared to last year.
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 <b>GENERAL AUDIENCE: FACEBOOK</b>	<b>7.2</b> MILLION	 <b>AMPLIFYING THE BRAND</b>	PBS Facebook users fell 26% compared to last season. Across the industry, Facebook is becoming a less preferred choice of social platform, even among Baby Boomers. Priority should be given to Instagram and TikTok, as both are expected to outpace growth of users on Facebook, Snapchat, and Twitter.
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# PBS AUDIENCE COMPOSITION

On-air and online, the PBS audience skews older, more female, and less diverse than the typical broadcast TV and digital media consumers. PBS's digital users are younger, more upscale, and more diverse than its broadcast viewers.



All Primetime TV viewers, regardless of which networks they watched.

Viewers who tuned to PBS Primetime within the 2020-2021 season.

All US internet users, regardless of which sites they visited.

Monthly visitors to PBS.org



# SERVING A MULTICULTURAL AUDIENCE

## A BALANCED APPROACH

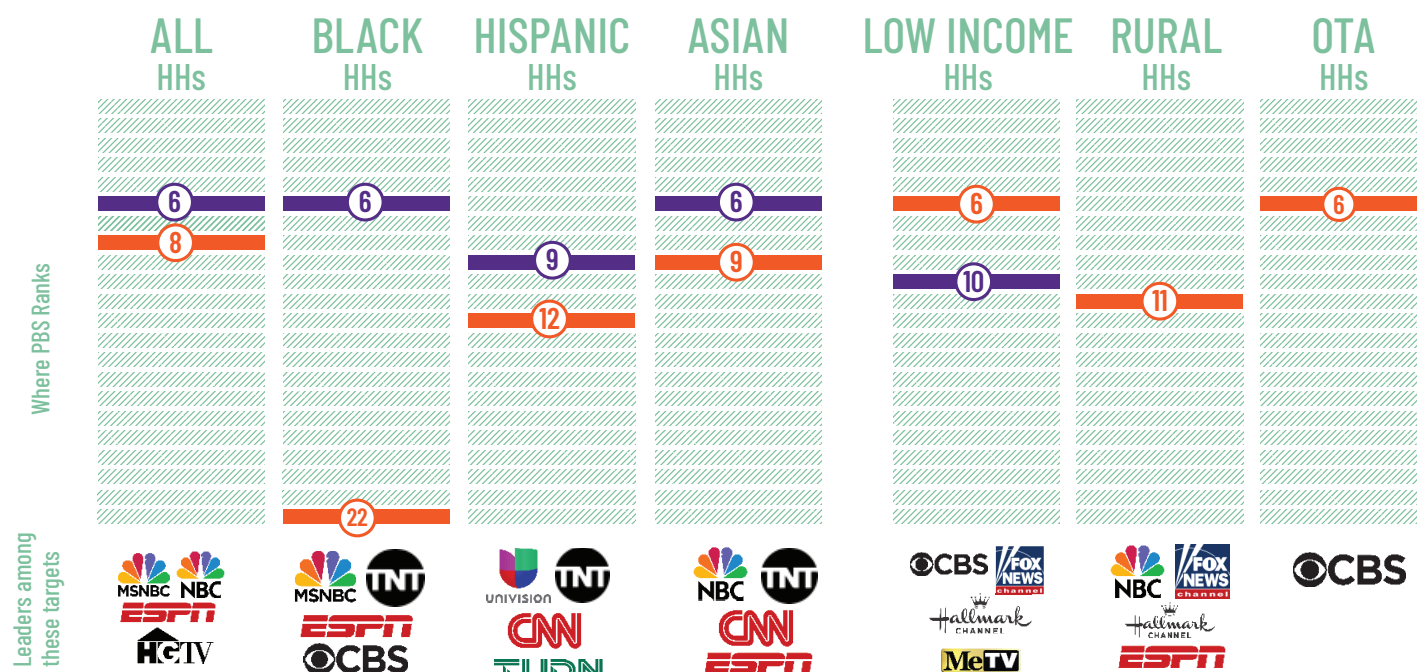
Season after season it has been demonstrated that broadly appealing, wisely scheduled and thoughtfully promoted programming serves up not only the biggest audiences, but finds the most multicultural ones as well. *Finding Your Roots* is perhaps the best example of a program that only increases its overall reach when its subjects are diverse. Additionally, long standing non-fiction series such as *Nature* and *NOVA* both have long track records of attracting diverse viewers in large numbers. Complementary to these series are special telecasts like this season's *The Black Church* and *Muhammad Ali*, which both excelled at finding high proportions of multicultural viewers through targeted content and marketing. It is important to note that diverse audiences are embracing digital streaming at a rapid pace. Finding and serving them where they are will be a challenge for PBS going forward.

## PBS RANK AMONG DIVERSE AUDIENCES

PBS ranks highly among many under-represented populations compared to its broadcast and cable network peers. Low Income and Over the Air households value PBS more highly than the general population. Hispanic and Asian American/Pacific Islander (AAPI) households rank PBS highly among their linear and digital choices. Black households visit less often and for fewer minutes, ranking PBS a relatively low #22 based on their Primetime viewing.

● PBS TV Rank  
● PBS.org Rank

PBS.org rank not available for Rural and OTA households.

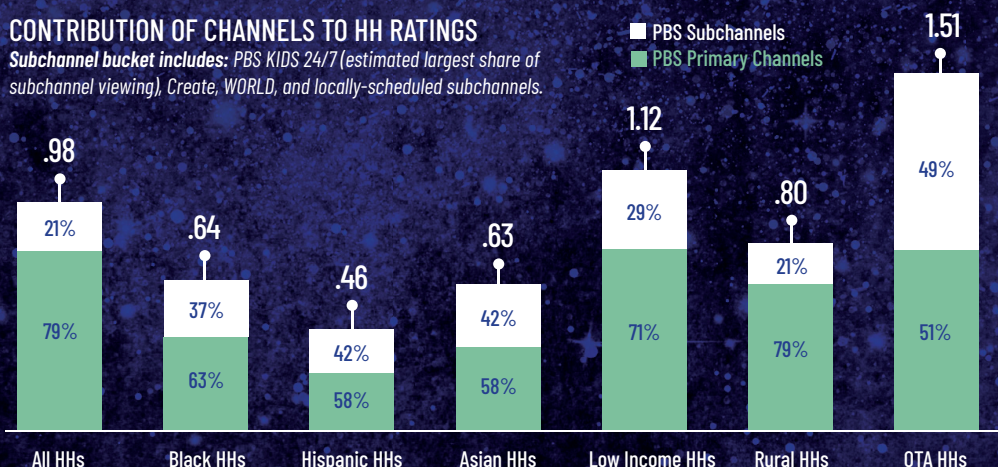


## HOW PBS ATTRACTS DIVERSE AUDIENCES

Subchannels nearly always attract greater proportions of PBS viewing among diverse populations. Though the surge of KIDS 24/7 viewing has waned substantially, WORLD, Create, and locally-fed subchannel content still draw considerable audiences. Black Households spend 37% of their time with subchannels, and Hispanic and AAPI watch even more. Subchannels are key when it comes to fulfilling PBS's mission.

### CONTRIBUTION OF CHANNELS TO HH RATINGS

Subchannel bucket includes: PBS KIDS 24/7 (estimated largest share of subchannel viewing), Create, WORLD, and locally-scheduled subchannels.



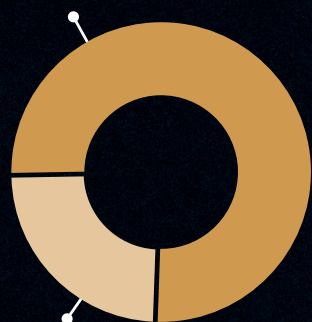




September 2021 brought the premiere of *Muhammad Ali*, the latest mini-series from celebrated filmmaker and long-time PBS collaborator Ken Burns. Over four telecasts, *Ali* reached over 15 million viewers on traditional television and digital streaming platforms. The series reached an average of 500,000 Black persons 18+ in any one minute, the most for any PBS program since November 2016's *Black America Since MLK*.

## VIEWING SUMMARY

74% | RECENT VIEWERS



26% | NON-RECENT VIEWERS



**10.5**  
MILLION  
HH Reach



**13.9**  
MILLION  
P2+ Reach



**2.6**  
MILLION  
Total Streams

## AUDIENCE COMPOSITION



**59%** | MALE

**41%** | FEMALE

60% | 65+

10% | 18-49

30% | 50-64

AGE

37% | \$100k+

26% | < \$40k

INCOME

17% | \$40k - \$59k

20% | \$60k - \$99k

5% | < 4 Yrs HS

20% | HS Graduate

EDUCATION

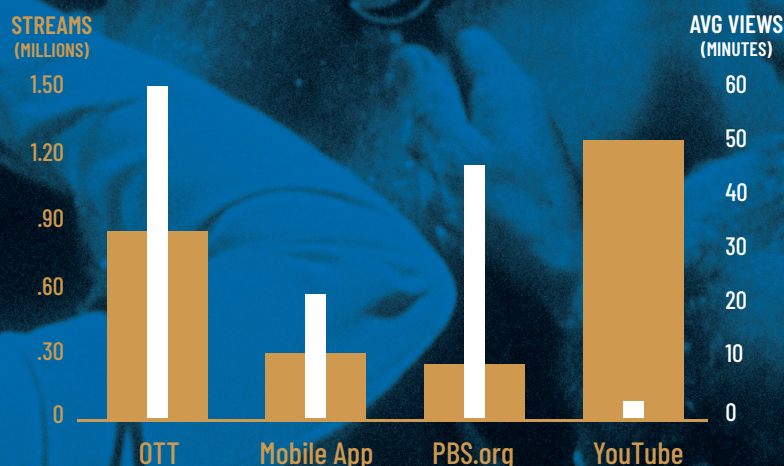
49% | 4+ Years College

26% | 1-3 Years College

**22%** | BLACK  
**2%** | AAPI  
**5%** | HISPANIC

## ALI ON PBS-OWNED PLATFORMS VS. YOUTUBE

While YouTube can quickly garner large amounts of views, PBS-owned platforms drove 90% of total streaming engagement by way of time spent viewing.

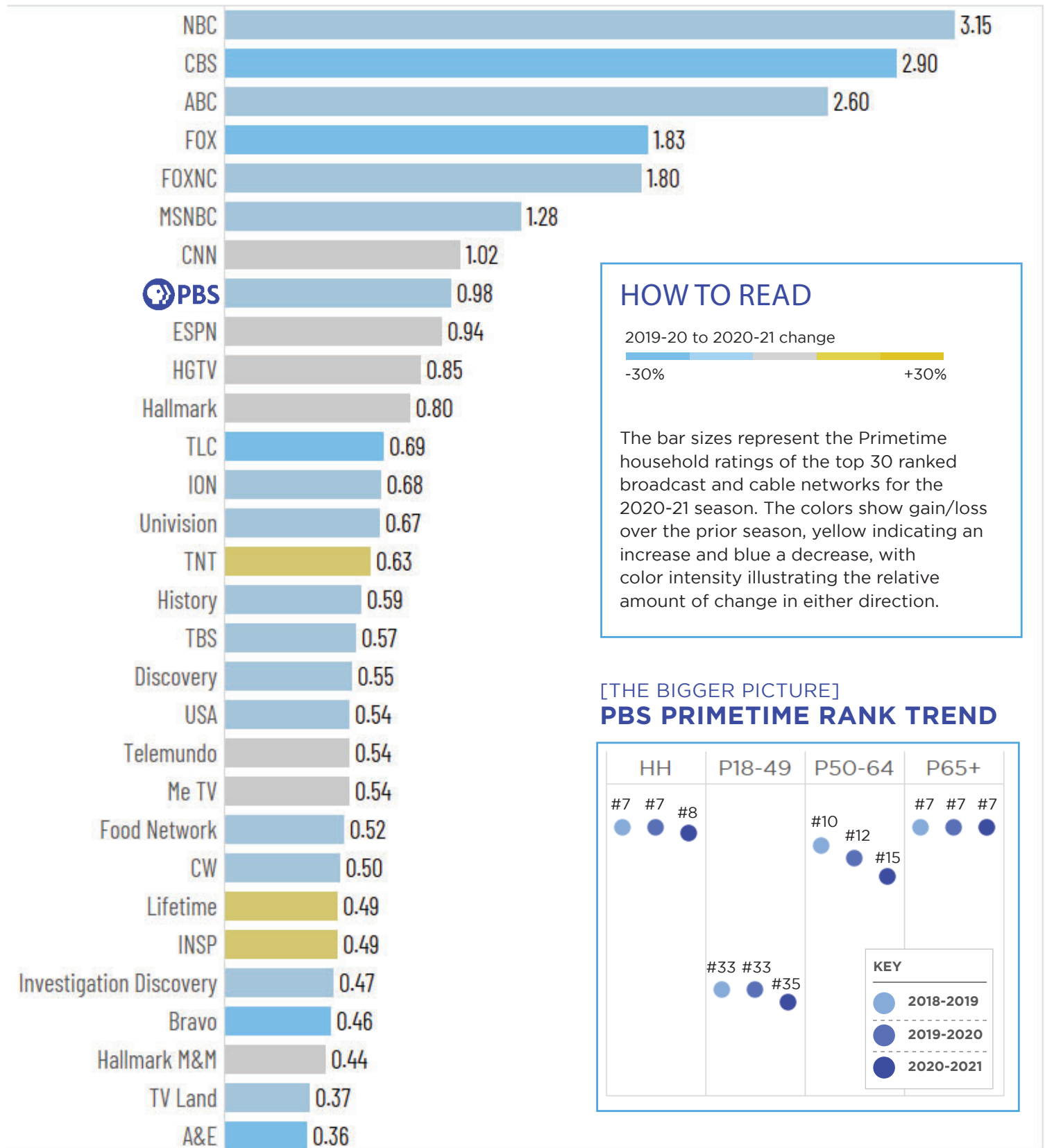




# TOP 30 NETWORKS

## RANKED BY PRIMETIME HH RATING

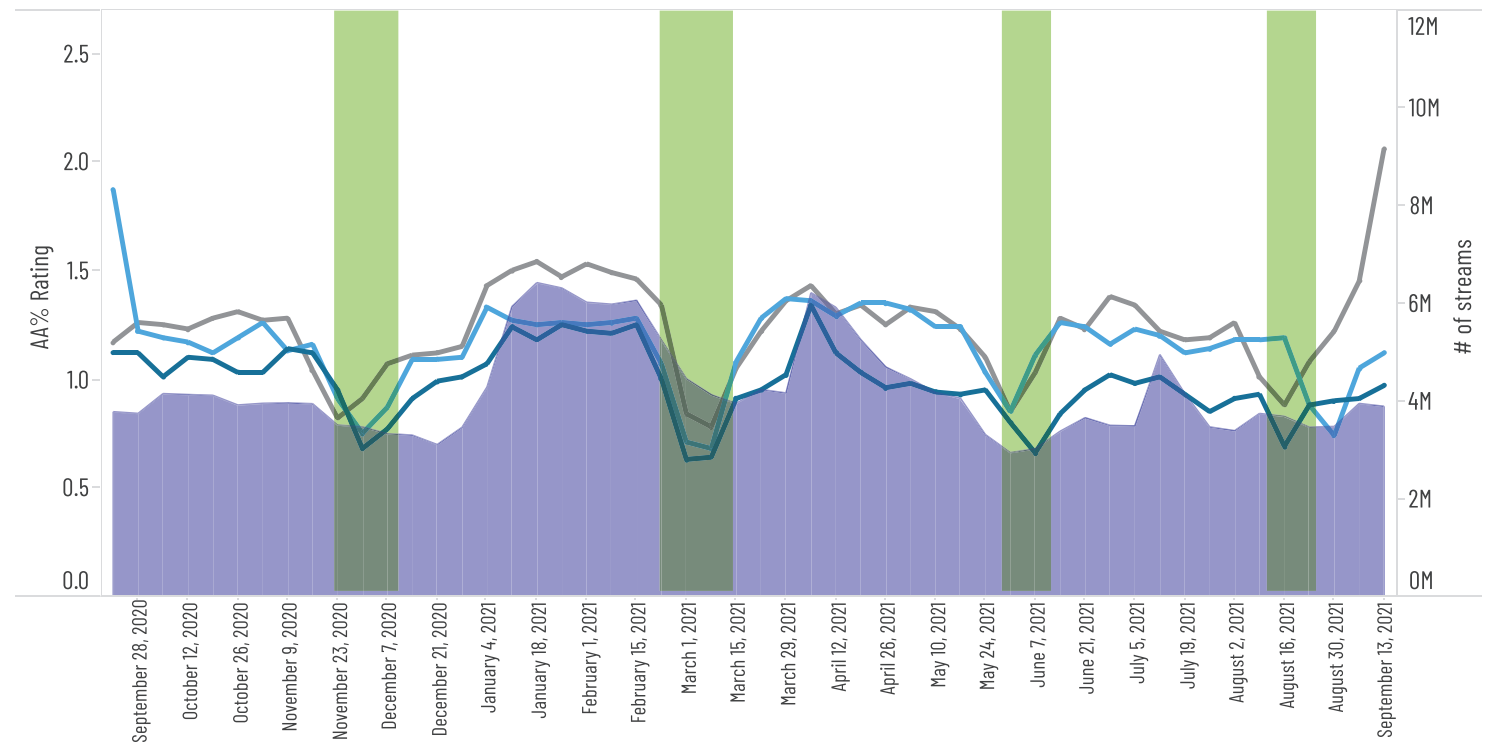
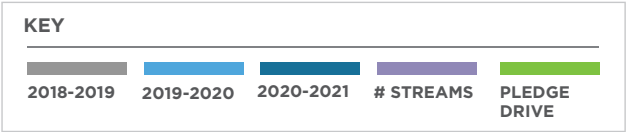
PBS slipped to 8th place this season among TV households, as CNN took over the 7th spot due in part to the ongoing heightened news cycle. Among younger adult demographics, PBS dipped in the rankings, however it maintained its number seven ranking among the core PBS audience aged 65+. TNT indirectly benefited from the pandemic when the 2020 NBA playoffs were pushed back into the 20-21 TV season, bolstering the network's ratings with two sets of NBA playoffs.



# PBS PRIMETIME HH RATINGS

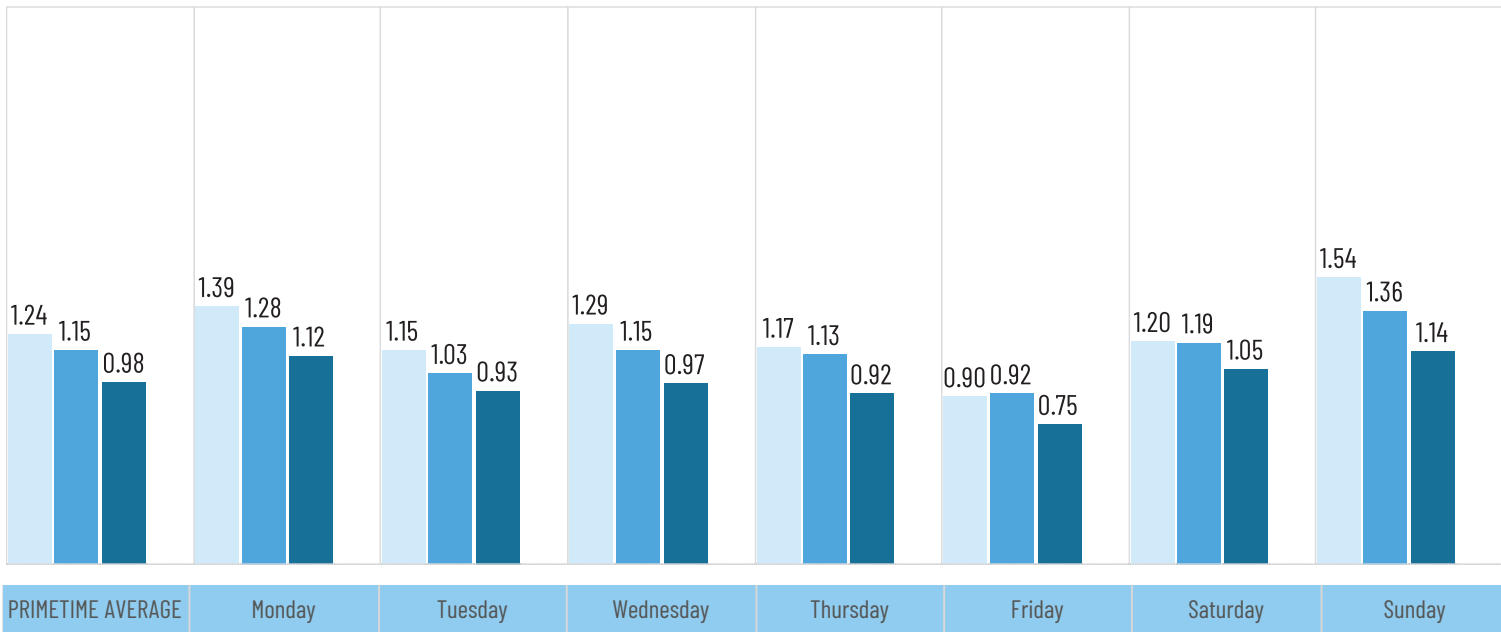
## TREND BY WEEK

Following the 19-20 season in which COVID kept viewers home and tuned to their TVs, the shifting landscape was once again clear during the 20-21 season as ratings dipped below prior years' norms during most weeks. One clear exception was the peak in early April 2021 thanks to the debut of Ken Burn's Hemingway.



## TREND BY NIGHT

PBS felt the impact of shifting landscape during the 20-21 TV season, with ratings dipping throughout the week. Locally-programmed Thursdays and Saturdays were not immune to the declines this year.



# PBS PRIMETIME AUDIENCE COMPOSITION BY SERIES



Amanpour & Co.

AMERICAN EXPERIENCE



FIRING LINE  
with MARGARET ROSSER












Men	42%	41%	43%	36%	38%	44%	36%	45%	48%
Women	58%	59%	57%	64%	62%	56%	64%	55%	52%
18 - 49	11%	15%	9%	10%	12%	8%	10%	8%	12%
50 - 64	23%	30%	30%	28%	31%	28%	27%	26%	35%
65+	66%	55%	61%	63%	57%	64%	63%	66%	53%
<\$40,000	32%	37%	30%	31%	32%	35%	28%	35%	32%
\$40,000 - 59,999	18%	19%	20%	18%	22%	18%	19%	18%	18%
\$60,000 - 99,999	28%	19%	22%	21%	23%	21%	23%	21%	21%
\$100,000+	26%	27%	31%	34%	22%	27%	31%	26%	31%
< 4 Yrs High School	5%	7%	4%	5%	5%	6%	3%	5%	5%
HS Graduate	19%	16%	16%	15%	21%	22%	17%	16%	18%
1-3 Ys College	25%	24%	24%	27%	29%	30%	27%	24%	26%
4+ Yrs College	46%	51%	53%	51%	44%	40%	50%	52%	49%
Asian	3%	8%	2%	2%	3%	2%	2%	3%	5%
Black	7%	15%	11%	12%	14%	5%	13%	9%	12%
Hispanic	6%	7%	4%	5%	6%	5%	5%	6%	7%
Over The Air (OTA)	22%	30%	19%	19%	18%	15%	13%	27%	24%
Median Age	69	66	68	69	67	69	68	71	65
Median Income (\$)	57,800	54,600	65,100	65,400	55,800	57,500	65,600	58,600	63,700

## HOW TO READ

Programs can be compared horizontally for each demographic. For example, 47% of viewers of *Independent Lens* are under age 65, compared to 26% of viewers of *Masterpiece*.

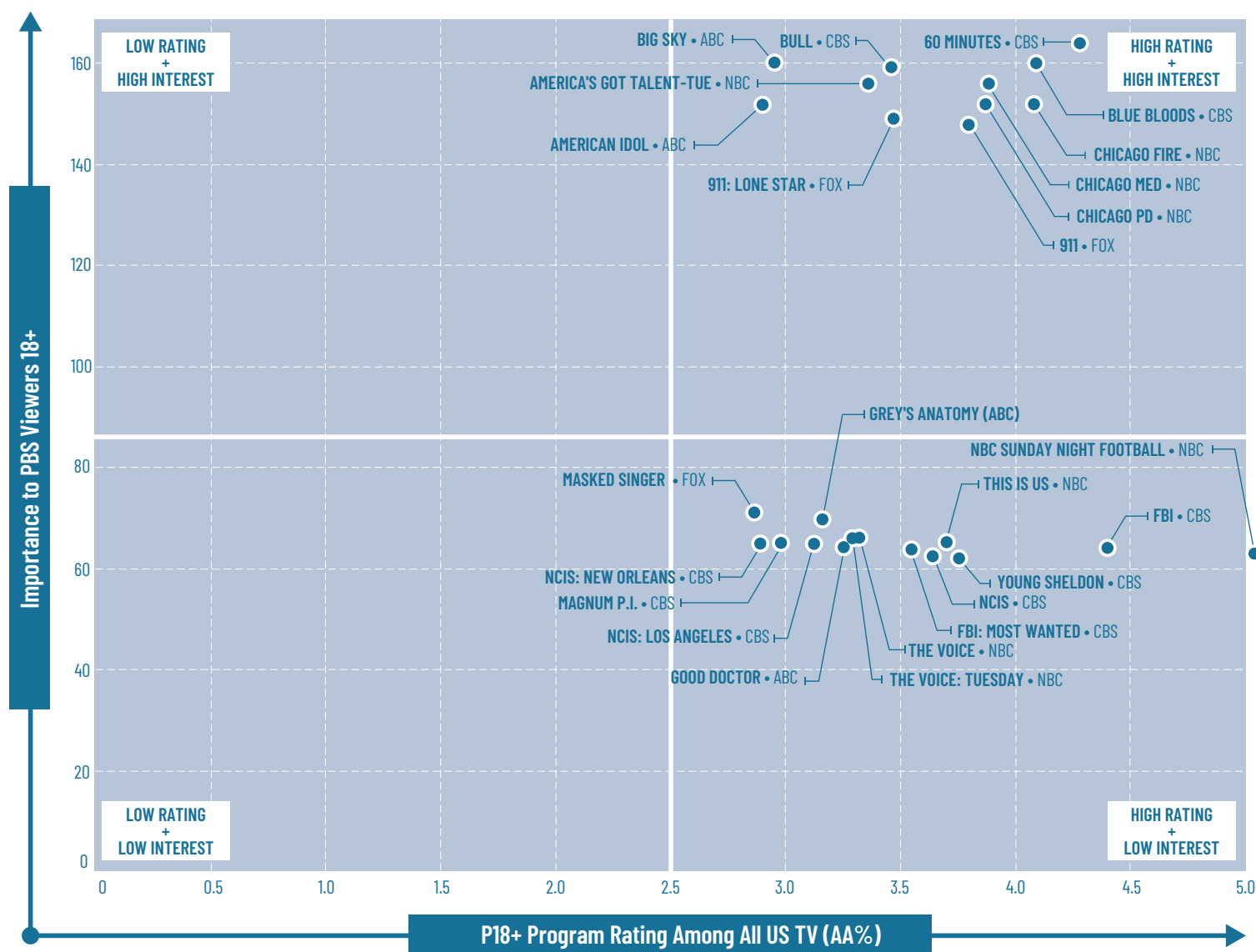
Note: This data covers the time period from 9/28/2020 - 2/28/2021

									
Men	42%	37%	42%	33%	50%	55%	47%	40%	43%
Women	58%	63%	58%	67%	50%	45%	53%	61%	57%
18 - 49	11%	9%	12%	8%	11%	12%	10%	14%	7%
50 - 64	23%	19%	35%	18%	26%	30%	24%	31%	23%
65+	66%	72%	53%	74%	63%	57%	67%	56%	71%
<\$40,000	32%	31%	40%	26%	34%	33%	22%	43%	31%
\$40,000 - 59,999	18%	17%	18%	19%	20%	19%	16%	17%	17%
\$60,000 - 99,999	28%	21%	19%	23%	22%	21%	26%	19%	23%
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< 4 Yrs High School	5%	4%	7%	2%	6%	5%	3%	10%	6%
HS Graduate	19%	17%	23%	14%	23%	19%	11%	24%	12%
1-3 Ys College	25%	22%	27%	24%	27%	27%	17%	27%	23%
4+ Yrs College	46%	55%	42%	56%	43%	46%	65%	40%	56%
Asian	3%	5%	4%	2%	4%	4%	6%	3%	5%
Black	7%	8%	14%	6%	9%	7%	7%	13%	8%
Hispanic	6%	6%	8%	4%	7%	7%	5%	9%	5%
Over The Air (OTA)	22%	15%	26%	11%	21%	24%	22%	31%	25%
Median Age	69	72	65	72	69	67	70	67	71
Median Income (\$)	57,800	67,900	54,000	68,267	59,700	62,300	75,000	51,500	65,000

# PBS VIEWER BROADCAST FAVORITES

## TOP 25 BROADCAST SERIES, 2020-21

PBS VIEWER **BROADCAST FAVORITES** 2020-2021



### HOW TO READ

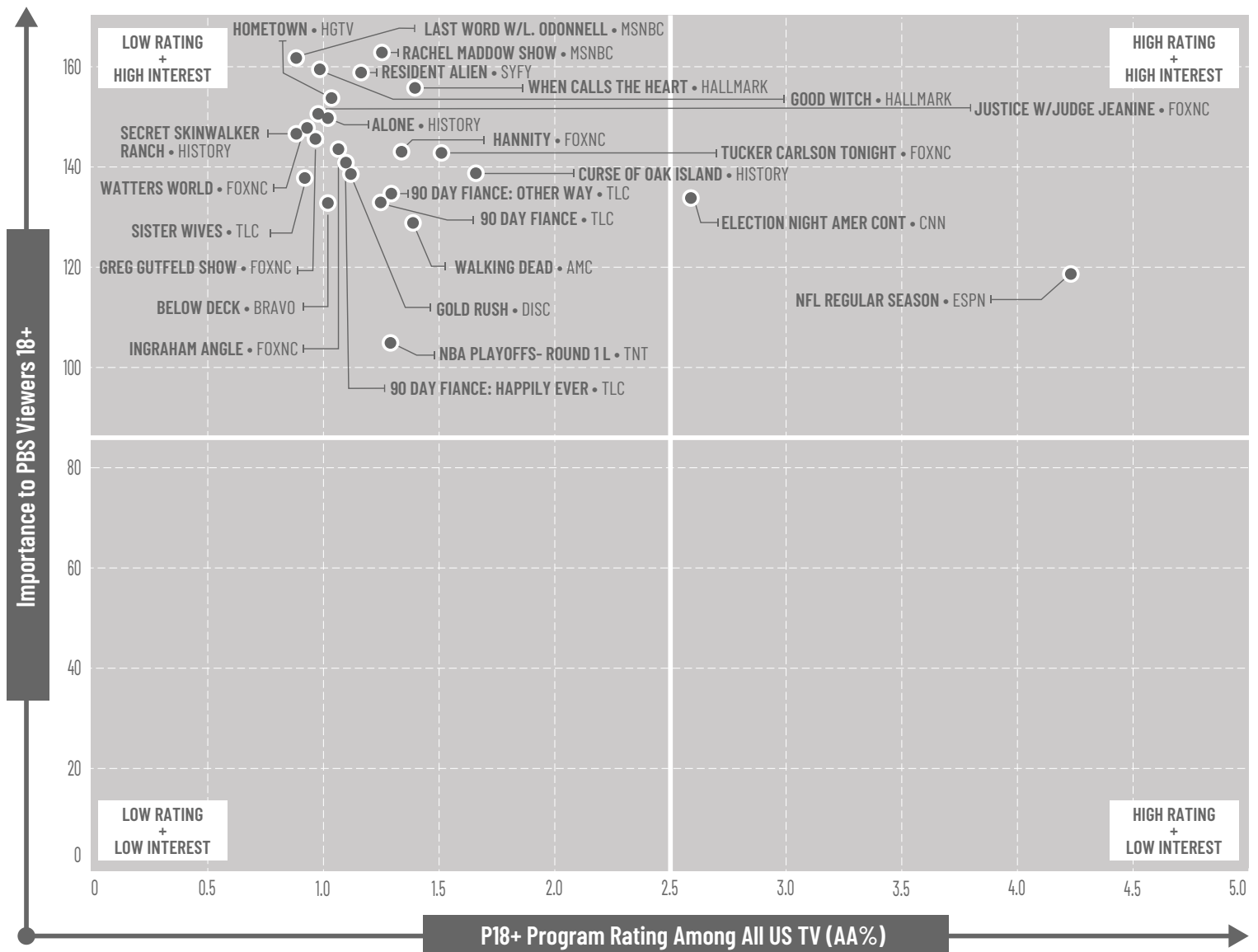
The horizontal axes show P18+ ratings for the top 30 programs on linear broadcast and cable TV this season. The vertical axes show the PBS Viewer Index, which is a calculation of the rating among PBS-viewing households for the top broadcast and cable programs relative to the rating among total US TV households. Programs that cluster in the top right quadrant indicate high interest among PBS viewers, for relatively high-rated shows.



# PBS VIEWER CABLE FAVORITES

## TOP 25 CABLE SERIES, 2020-21

PBS VIEWERS **CABLE FAVORITES** 2020-2021



### HOW TO USE

Programs that are highly rated among both viewers overall and PBS viewers could be considered competitive threats. MSNBC's and Fox News' opinion lineup are good examples. But even though NFL games on NBC and ESPN, and NBA games on TNT continue to be the most-viewed of any programs on TV, PBS viewers are less interested, and the time slots represent opportunities to counter-program.

# PBS DIGITAL PERFORMANCE

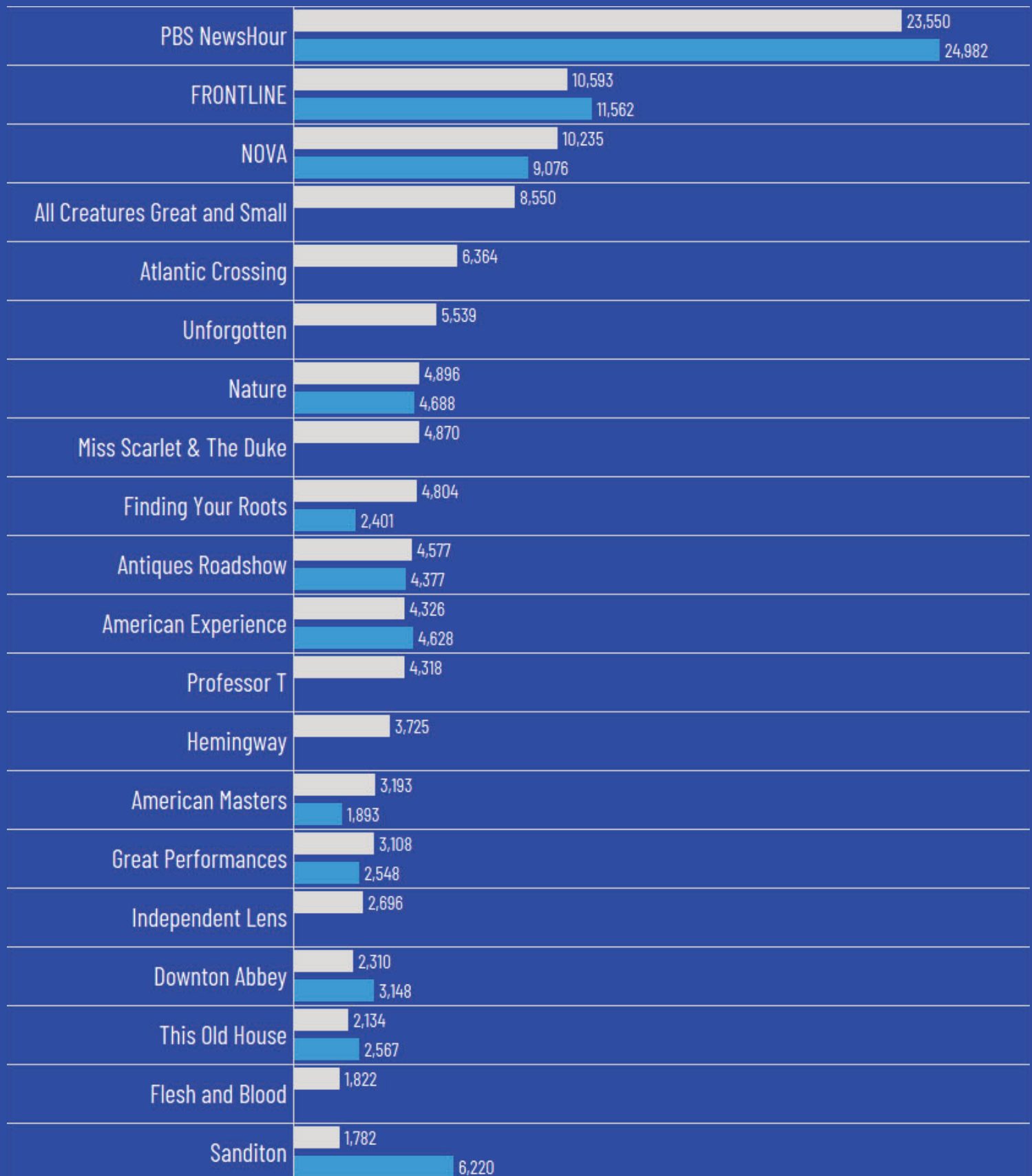
## DIGITAL SERIES RANKER, TOP 20 PROGRAMS

TOTAL STREAMS (000)

### KEY

2020 - 2021

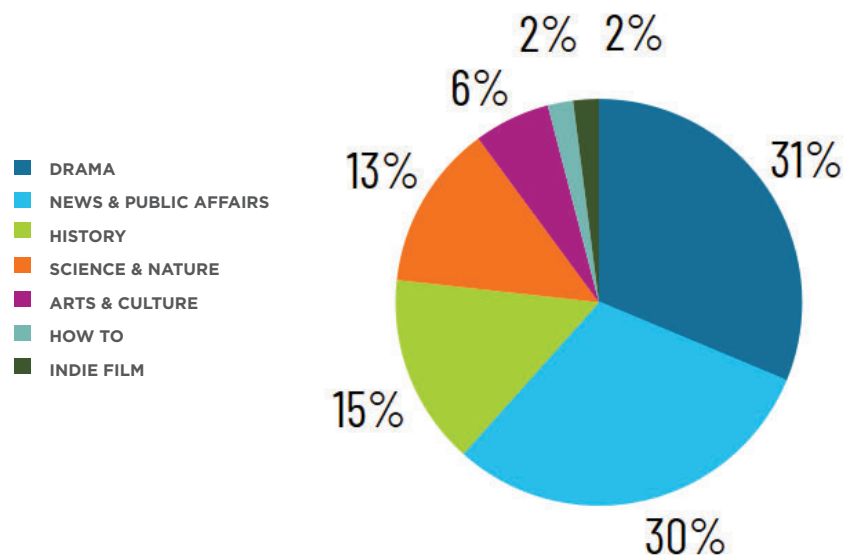
2019 - 2020



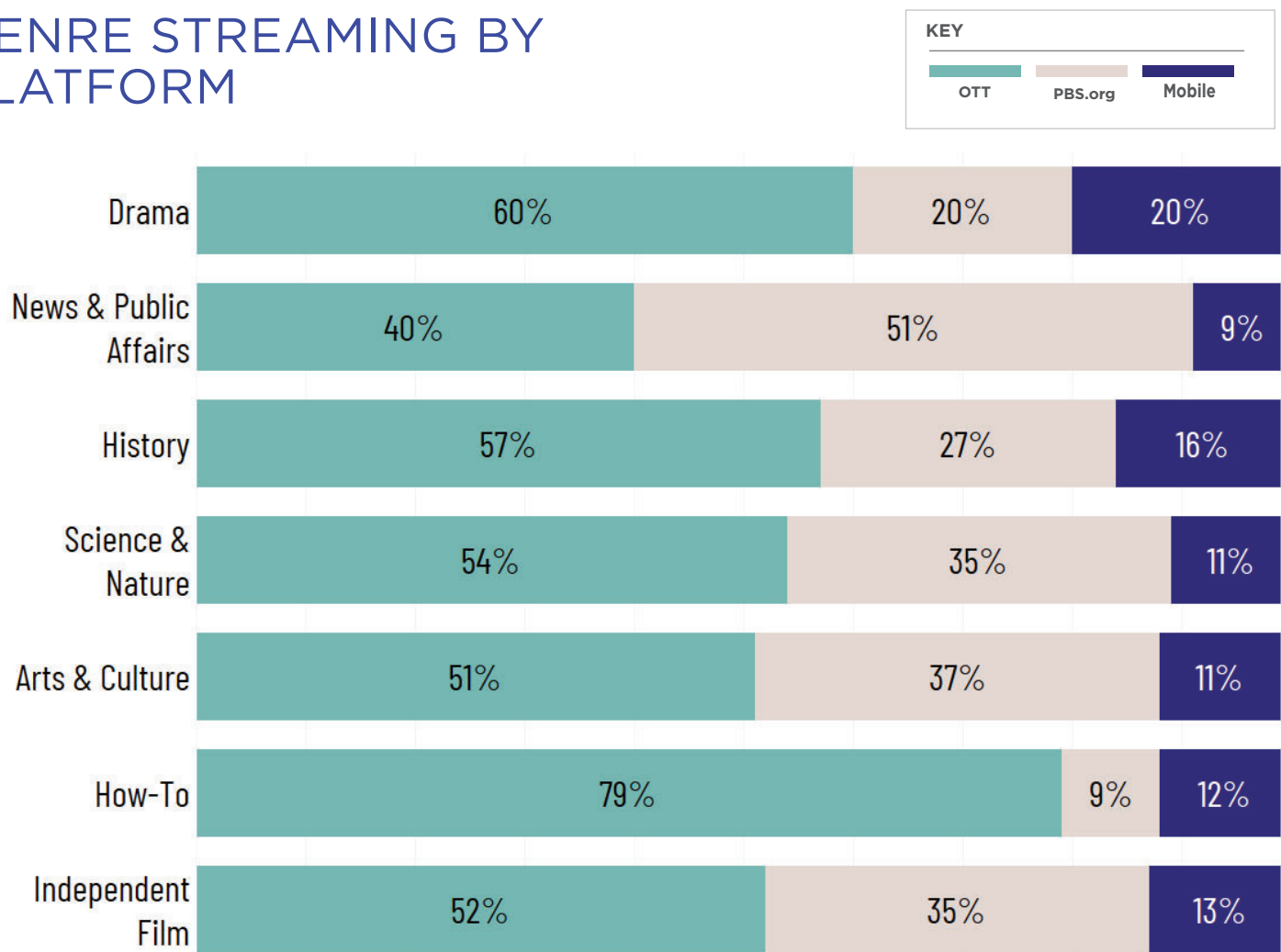
# PBS DIGITAL PERFORMANCE

## GENRE CONTRIBUTION TO TOTAL STREAMS

Drama and non-fiction titles drove overall PBS-owned digital streams in the 2020-21 season. Of the top 20 titles, Drama and News + Public Affairs accounted for more than 60% of streams. *PBS Newshour* had over 23.5M video plays, the most among all titles and more than double *Frontline's* streams, which ranked second.



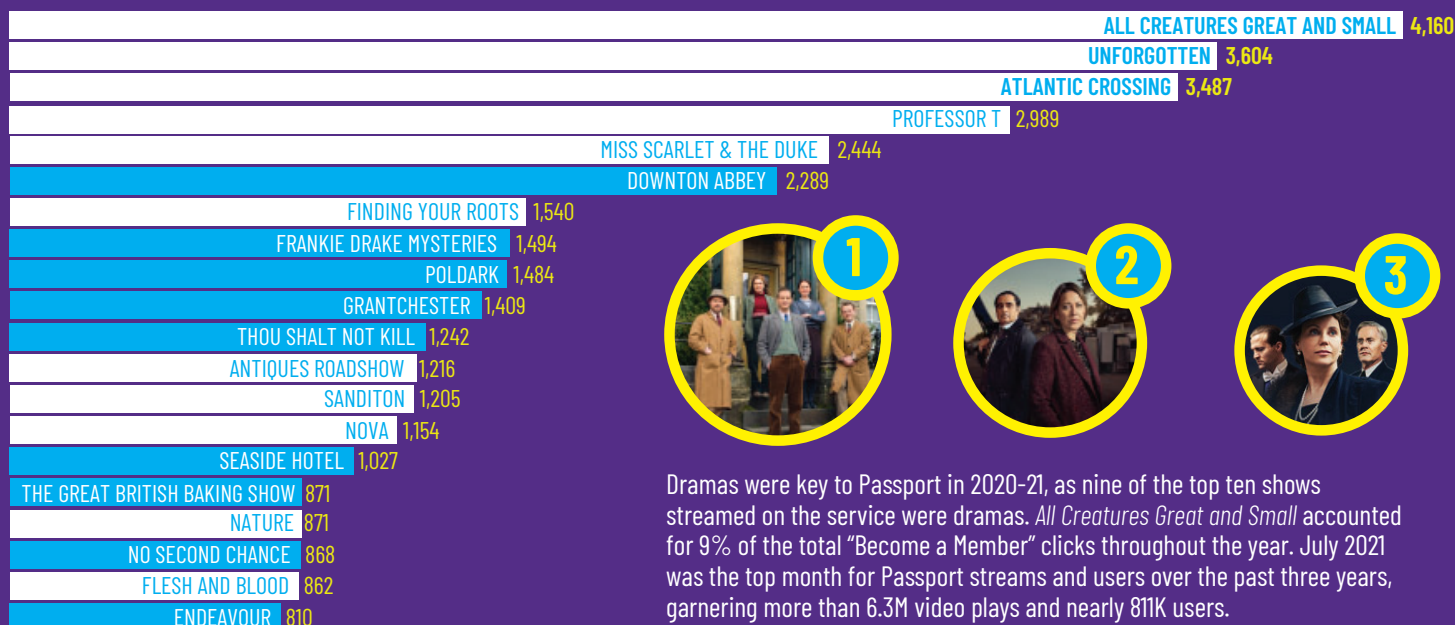
## GENRE STREAMING BY PLATFORM



Passport is a member streaming benefit that was first launched in December 2015. Spurred by a combination of special Passport promotions (advance availability and exclusives), the implementation of up-next and autoplay on OTT, and elevated streaming usage due to the pandemic, 2020-21 marked a record year for Passport activations, streams, and users.

## TOP 20 PROGRAMS BY STREAMS (000)

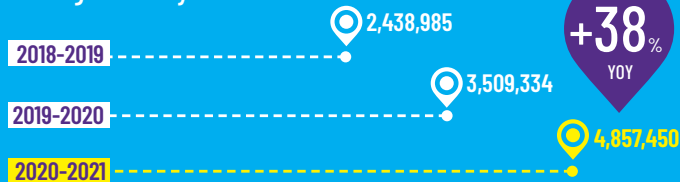
(Blue bars represent Passport Exclusives)



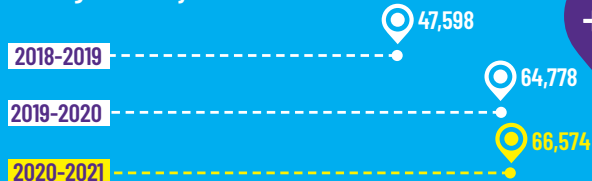
Dramas were key to Passport in 2020-21, as nine of the top ten shows streamed on the service were dramas. *All Creatures Great and Small* accounted for 9% of the total "Become a Member" clicks throughout the year. July 2021 was the top month for Passport streams and users over the past three years, garnering more than 6.3M video plays and nearly 811K users.

## THREE-YEAR TRENDS

### Average Monthly Streams



### Average Monthly Activations

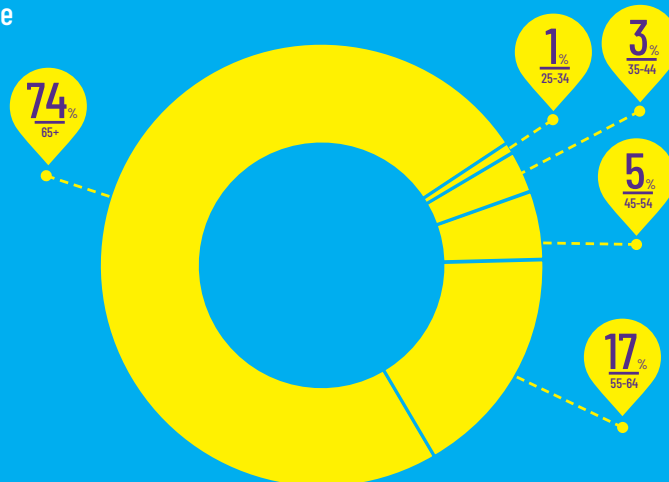


### Average Monthly Users

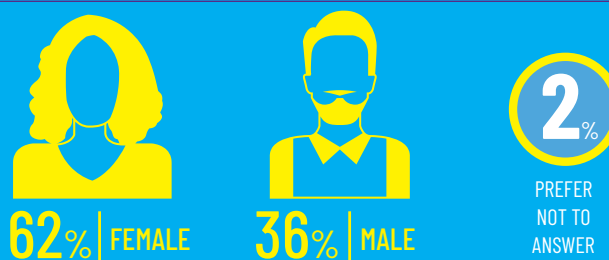


## DEMOGRAPHICS

### Age



### Gender





# YOUTUBE TV AND LIVESTREAM

As on-demand content choices proliferate and consumers grow accustomed to a tailored viewing experience, PBS and its member stations are committed to reaching audiences where they are. In its first full year since launch, local livestreaming on YouTube TV and the General Audience Local Livestream kept us competitive in a rapidly evolving digital landscape. In an effort to increase distribution across platforms and services, the PBS app debuted as a pre-installed app on VIZIO SmartCast TVs in 2021. “With people continuing to turn to online platforms for content, it remains important for PBS and our local stations to expand our digital footprint. The launch of Local Livestreaming on YouTube TV and PBS digital platforms was a true local/national effort and represents a major milestone in providing quality programming to the greatest number of people, regardless of how they choose to consume it,” says Ira Rubenstein, PBS’s Chief Digital & Marketing Officer. Additionally, we launched our first group of stations on DIRECTV Stream in November 2021, with more rolling out in 2022.



## Local Livestream



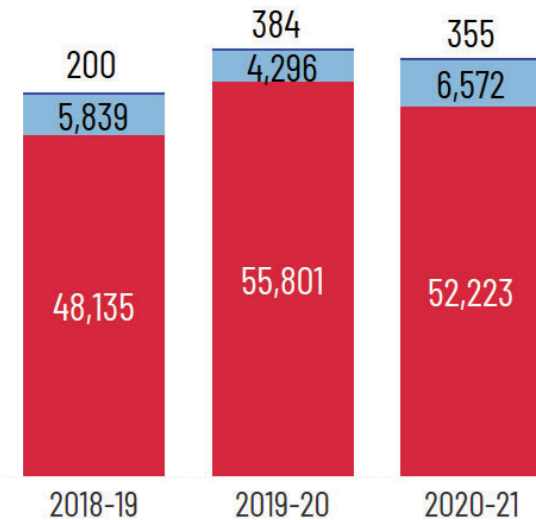
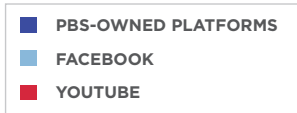
- Launched December 17, 2019.
- **90% of stations** now live with their primary broadcast (most are full local); 76% of stations also live with KIDS Channel.
- Content that is viewed is being credited to national Nielsen ratings when necessary measurement criteria are met.
- Each participating station has their own reporting dashboard, available from Google.
- Launched on June 24, 2020.
- There are currently **142 stations livestreaming**: 7 national, 135 local.
- Currently available across all PBS-owned platforms, with Samsung TV/Tizen launch TBD.
- Data for Local Livestream performance is available in the Local Analytics Dashboards in Domo – [pbs-org.domo.com](https://pbs-org.domo.com).
- First group of stations launched on November 8th, 2021
- We will have **80 stations** live on the service by the end of the 2021, with more rolling out through 2022.
- Each participating station receives viewership data monthly via excel report, from DIRECTV.



Streams from Digital Studios remained relatively steady, with small year-over-year gains on Facebook offsetting slight losses from YouTube and PBS-owned platforms.

## Average Monthly Streams (000)

Three-year trend



Top 3 Videos, 2020-21

## YouTube

1. This Killer Fungus Turns Flies Into Zombies
2. How We Domesticated Cats (Twice)
3. A Tsetse Fly Births One Enormous Milk-Fed Baby

Top 3 Videos, 2020-21

## Facebook

1. How Well Do Masks Work To Stop COVID-19?
2. The Origin of Race in the USA
3. What This Chart Actually Means For COVID-19

Top 3 Videos, 2020-21

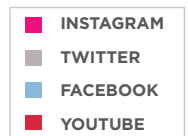
## Owned PBS Platforms

1. What Was Jesus' Real Name?
2. How Intelligent Are Dogs, Really?
3. Inside The Lab That Invented the COVID-19 Vaccine

## PBS ON SOCIAL MEDIA

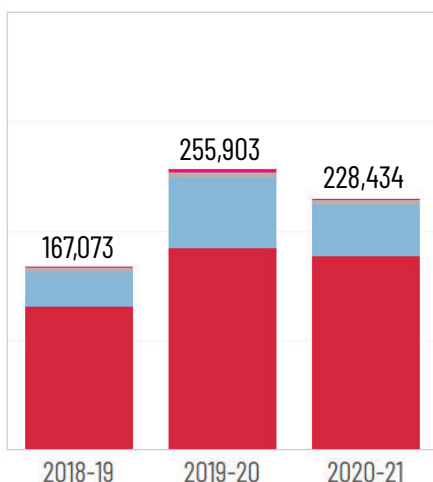


Views and engagements across PBS's social accounts fell slightly year-over-year, driven by fewer uploads and less people at home in the second year of the pandemic.



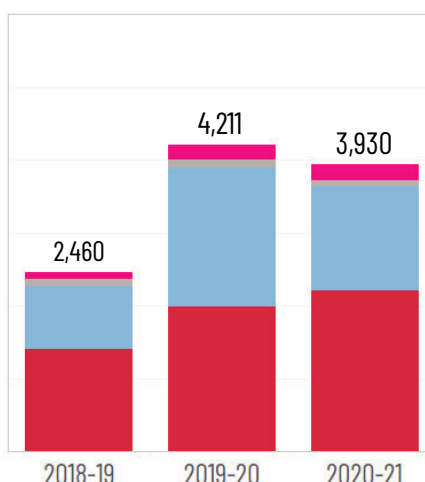
## Views (000)

Average Monthly # of Views by Platform  
Three-year trend



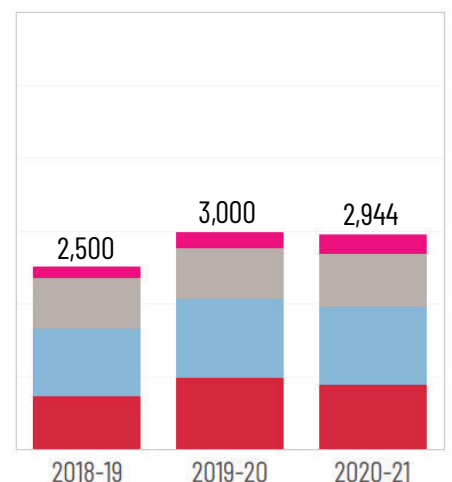
## Engagements (000)

Average Monthly # of Engagements by Platform  
Three-year trend



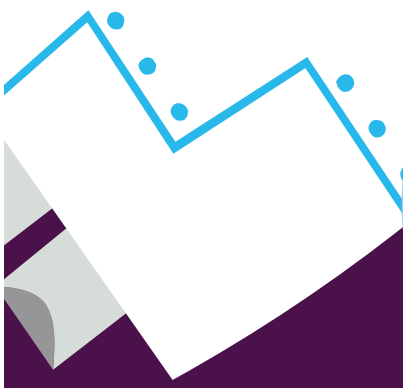
## Uploads

Average Monthly # of Uploads of PBS Content by Platform  
Three-year trend











# 03

## PBS KIDS SEASON OVERVIEW

Children are learning from an early age to watch videos and play games on digital devices or stream shows on the TV screen. They are not watching linear TV in the same way that previous generations, or even their older siblings, may have done. Over the past year, children spent less time (-16%) in front of the TV, with the growth rate of OTT streaming slowing (+3%) and no longer offsetting the linear TV declines. While we don't believe overall screentime is declining, children are increasingly consuming more content on other devices. The pandemic cemented this shift to digital content, and we anticipate that trend to continue.

For PBS KIDS specifically, this year marked the second year in a row of notable growth across digital platforms, which include station-branding and localization. On average each month, pbskids.org users (+16%), streaming (+41%), and Games app users (+9%) have all increased. As of November 2021, PBS KIDS apps have been downloaded more than 100 million times.

As children shift to digital media, linear viewing of PBS stations continues to wane. Among Kids 2-8, reach of the weekday National Program Service (NPS) schedule dipped by 37% and the KIDS 24/7 channel reach declined 22% from last season. The notable decline for the KIDS 24/7 channel is due in part to the prevalence of TV streaming (OTT) capabilities among children in homes receiving their linear TV content Over The Air (OTA); the more streaming options children have, the less they watch linear TV, including PBS KIDS. Nearly 90% of Kids 2-8 in OTA homes now have OTT capabilities. Nationally, 97% of children 2-8 are in homes with OTT streaming capabilities.







Over the past year, PBS KIDS continued to implement its “New Voices, New Approaches” strategy, designed to bring new voices to public television and to offer educational media that represents our diverse audience through an increasingly broad array of formats and devices. Both *Elinor Wonders Why* and *Donkey Hodie* successfully launched on-air and across PBS KIDS digital platforms during the 2020-21 season, reaching children on whichever platform they choose. Additionally, *Alma's Way* launched in October 2021. All three series ranked among the top five for PBS KIDS in terms of streaming during their initial launch windows.

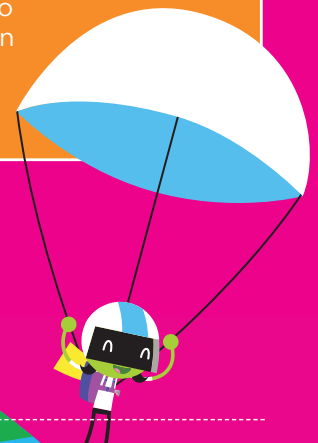
# PBS KIDS CROSS-PLATFORM VIEWING



OWNED PLATFORMS

NON-OWNED PLATFORMS

PLATFORM	AVERAGE MONTHLY USERS	AVERAGE MONTHLY ENGAGEMENT PER PERSON (HRS:MIN)	INSIGHTS
 PBS.ORG	8.2 MILLION	0:45	The pandemic driven influx of technology use by educators since March of 2020 has contributed to students turning to pbskids.org in larger numbers than ever.
 VIDEO AND OTT APPS	5.6 MILLION	4:40	PBS KIDS digital content is available on both OTT and mobile video apps, providing content to children on whichever platform they choose. The time spent viewing on video apps is rivaling that of the NPS schedule on primary PBS stations for the first time.
 PBS KIDS 24/7 KIDS 2-8	2.7 MILLION	7:15	The TV audience in OTA homes remains the most loyal, engaged viewer base of PBS KIDS 24/7 linear TV channels. However, these children increasingly have access to digital content and many more viewing options than in the past. On average, they watched nearly four hours less of the PBS KIDS 24/7 channel, on average, than they did one year ago.
 PRIMARY CHANNEL WEEKDAY KIDS 2-8	2.4 MILLION	4:41	Viewing to the NPS has mirrored TV usage in general, though those who tune in are more engaged than those tuning to most other digital sources; the largest screens still retain a devoted audience.
 PBS KIDS GAMES APP	2.4 MILLION	1:33	The PBS KIDS Games app continues to grow in reach, yet there is less engagement, on average, than longer form video content on TV or the PBS KIDS video apps.
	6.4 MILLION	3:36 (mm:ss)	Increasing in popularity, PBS KIDS' YouTube user count is second only to pbskids.org, but triples the website in terms of time spent viewing per person.



# PBS KIDS AUDIENCE COMPOSITION BY SEGMENT



Daytime  
TV Usage



PBS NPS  
Weekday Viewing



KIDS 24/7  
Viewing



Digital

Reach	Kids 2-8	19,038	2,438	2,719	
	Kids 2-11	27,135	3,061	3,581	
	Viewers 2+	235,104	28,854	33,852	8,247
Age and Income	Median Age (K2-11)	5	4	4	
	Median HH Income (\$)	62,500	58,000	41,900	
Gender	Female 2-8	47%	39%	45%	61%
	Male 2-8	53%	61%	55%	39%
Age	Kids 2-5	53%	71%	63%	
	Kids 6-8	24%	20%	24%	
	Kids 9-11	23%	9%	13%	
Income	<\$40,000	26%	36%	45%	14%
	\$40,000-\$59,000	20%	14%	18%	12%
	\$60,000-\$74,999	10%	7%	6%	12%
	\$75,000-\$99,999	14%	17%	9%	16%
	\$100,000+	33%	29%	21%	45%
Education	< 4 Years HS	15%	19%	18%	7%
	HS Graduate	26%	25%	33%	25%
	1-3 Years College	32%	29%	27%	26%
	4+ Years College	29%	29%	24%	43%
Race and ethnicity	Hispanic	27%	34%	24%	15%
	Black	17%	12%	18%	11%
	Asian	4%	5%	9%	3%
	White	59%	54%	48%	78%
Media	Cable or Satellite	82%	63%	24%	
	OTT Capable HH	90%	81%	70%	76%
	Over the air	11%	36%	70%	

All linear TV viewing  
M-F 7AM-6PM

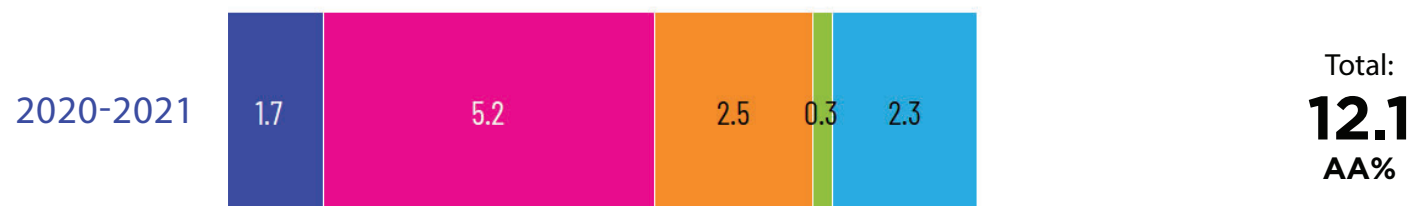
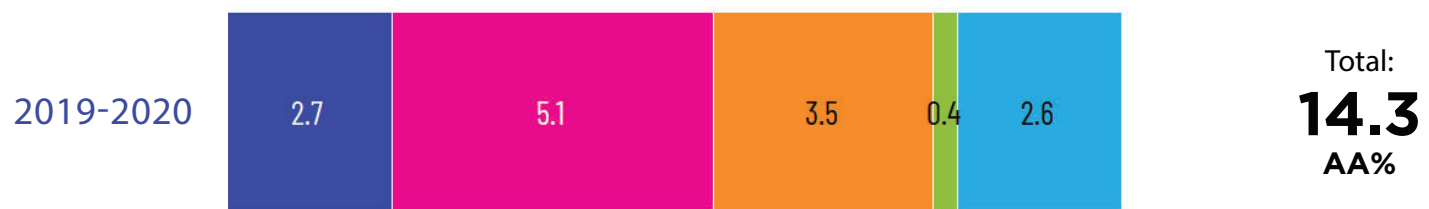
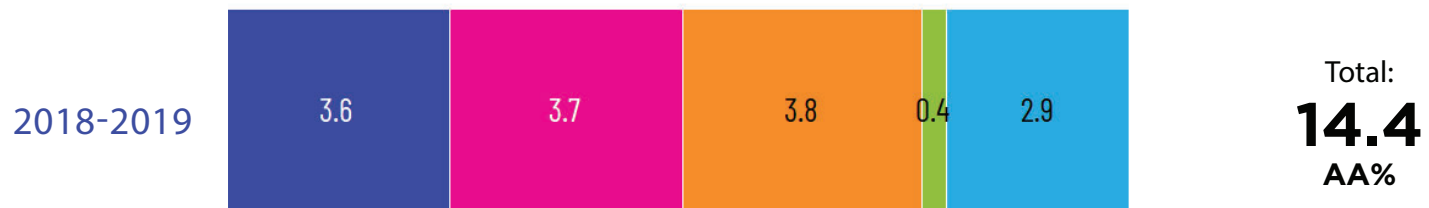
Viewing to primary PBS  
stations M-F 7AM-6PM

PBS Subchannels  
M-Su 6AM-6AM

pbskids.org, mobile  
and games app users



# TOTAL KIDS 2-8 RATINGS BY VIEWING SOURCE



■ PBS & KIDS CABLE NETWORKS
 ■ STREAMING
 ■ ENGLISH BROADCAST & CABLE
 ■ SPANISH BROADCAST & CABLE
 ■ OTHER TV USAGE

Children are not watching linear TV in the same way that previous generations, or even their older siblings, may have done. Over the past year, children spent less time (-16%) in front of the TV, with the growth rate of OTT streaming slowing (+3%) and no longer offsetting the linear TV declines. While we don't believe overall screentime is declining, children are increasingly consuming more content on other devices. The pandemic cemented this shift to digital content, and we anticipate the shift away from the TV screen to continue.

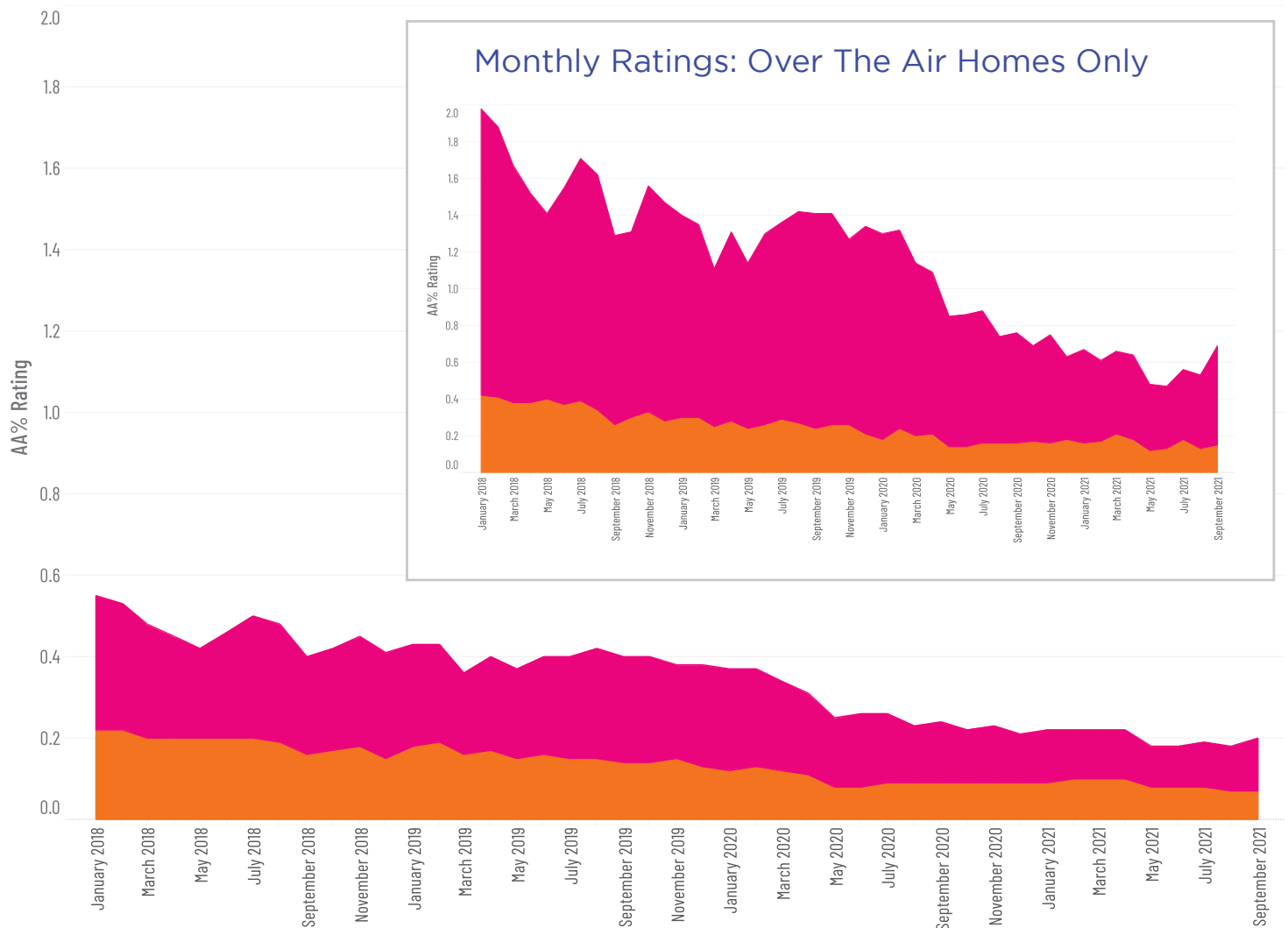
# PBS KIDS RATINGS BY VIEWING SOURCE

## TOTAL US KIDS MONTHLY RATINGS: KIDS 2-8

Three-Year Trend

Includes Cable/Satellite, Over The Air, and Broadband Only

KIDS 24/7  
PRIMARY STATIONS



Once bolstered by children in OTA homes, the PBS KIDS 24/7 channel ratings have experienced a sharp decline beginning in the spring of 2020. Children are increasingly streaming content to their TVs or looking to digital devices, lowering ratings not just to PBS KIDS, but to all of the children's cable networks as well. As a result, PBS KIDS linear TV ratings are half of what they were two years ago among Kids 2-8.

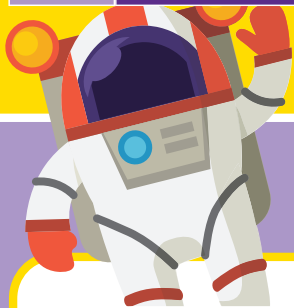
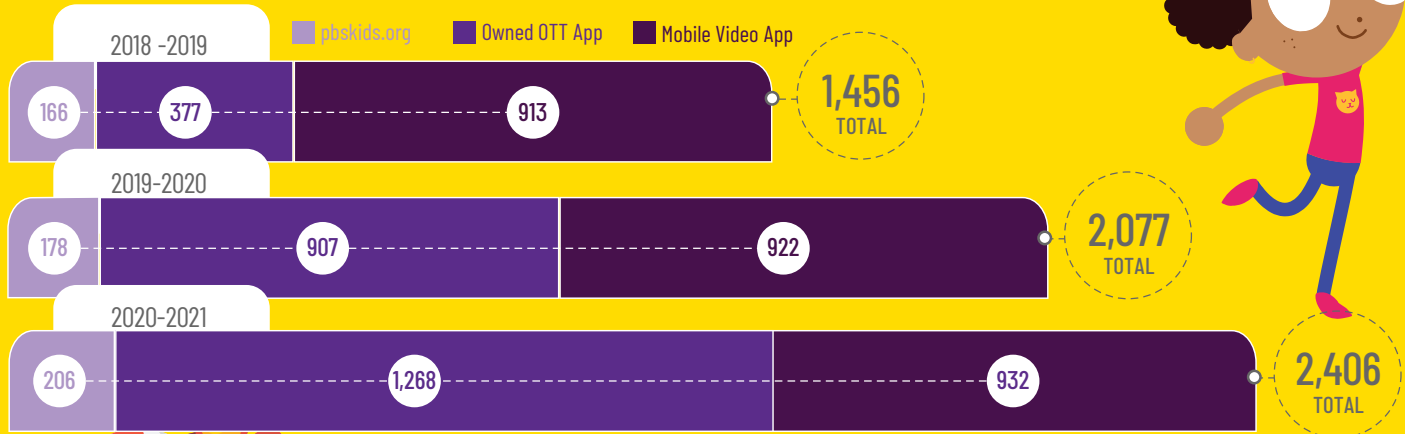


# A CLOSER LOOK AT THE PBS KIDS AUDIENCE

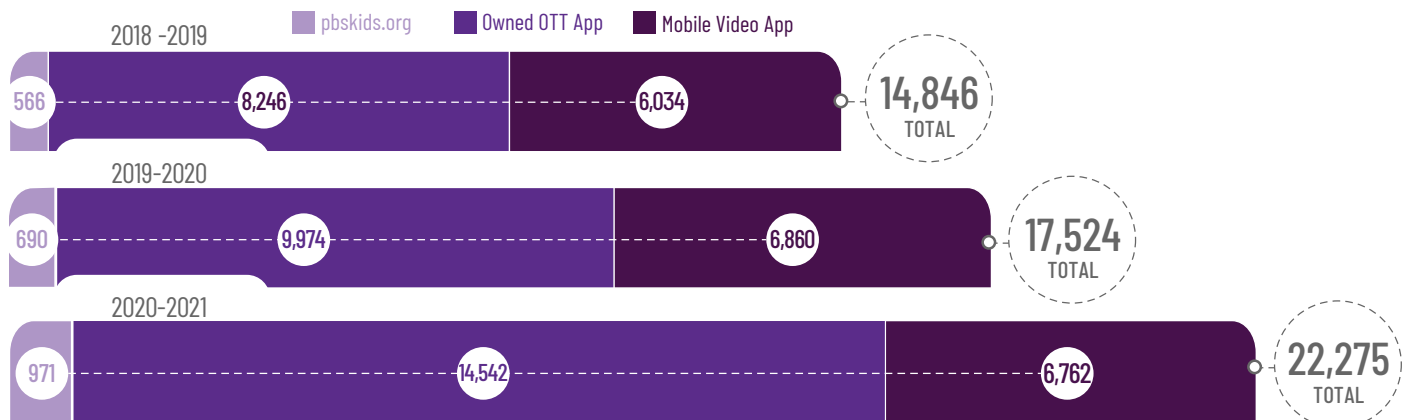
## KIDS DIGITAL LIVESTREAM:

As the PBS KIDS Livestream audience continues to grow, much of that growth can be attributed to users discovering the services on OTT platforms where users tripled from two seasons ago. The PBS KIDS Video app and OTT audience now reach nearly the same number of average monthly users. OTT users stream more than double the amount of videos than mobile and pbskids.org combined.

### CROSS-PLATFORM AVERAGE MONTHLY USERS (000)



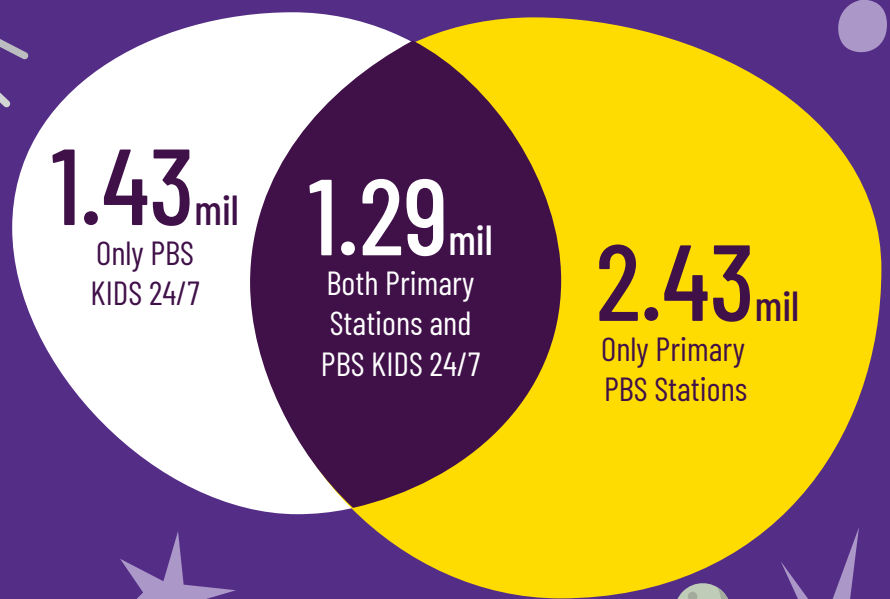
### CROSS-PLATFORM AVERAGE MONTHLY STREAMS (000)





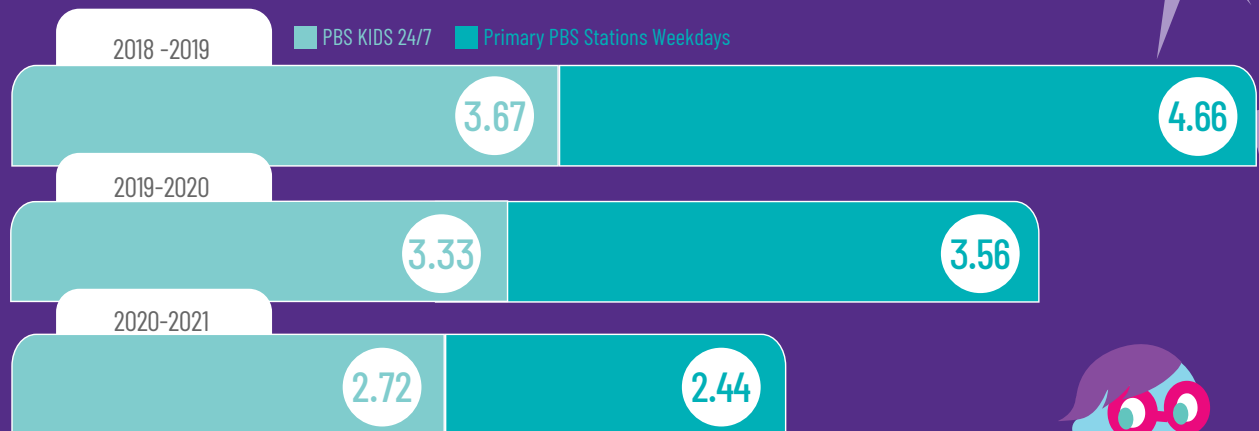
## PBS KIDS TV AUDIENCE DUPLICATION

The NPS and PBS KIDS 24/7 channels together reach an average of 5.15 million Kids 2-8 each month. Primary stations have the broadest reach, while the PBS KIDS 24/7 channels have a highly engaged audience comprised primarily of children viewing in Over The Air homes.



## PBS KIDS 24/7 LINEAR REACH TREND (IN MILLIONS)

Kids 2-8 reach on the NPS has declined by almost half from two years ago, with its most pronounced decline coming in the last year. The Kids 2-8 decline on the subchannels is less prominent.



## NEW SERIES ON PBS KIDS

**Elinor  
Wonders Why**

Ranks in the  
**TOP FIVE**  
PBS KIDS series  
each month  
among kids 2-5.

Averages  
**500,000**  
monthly users on  
pbskids.org

**Donkey  
Hodie**

Averages  
**1.3 million**  
kids 2-8  
on PBS stations  
monthly

Averages  
**560,000**  
monthly users on  
pbskids.org

**Alma's  
Way**

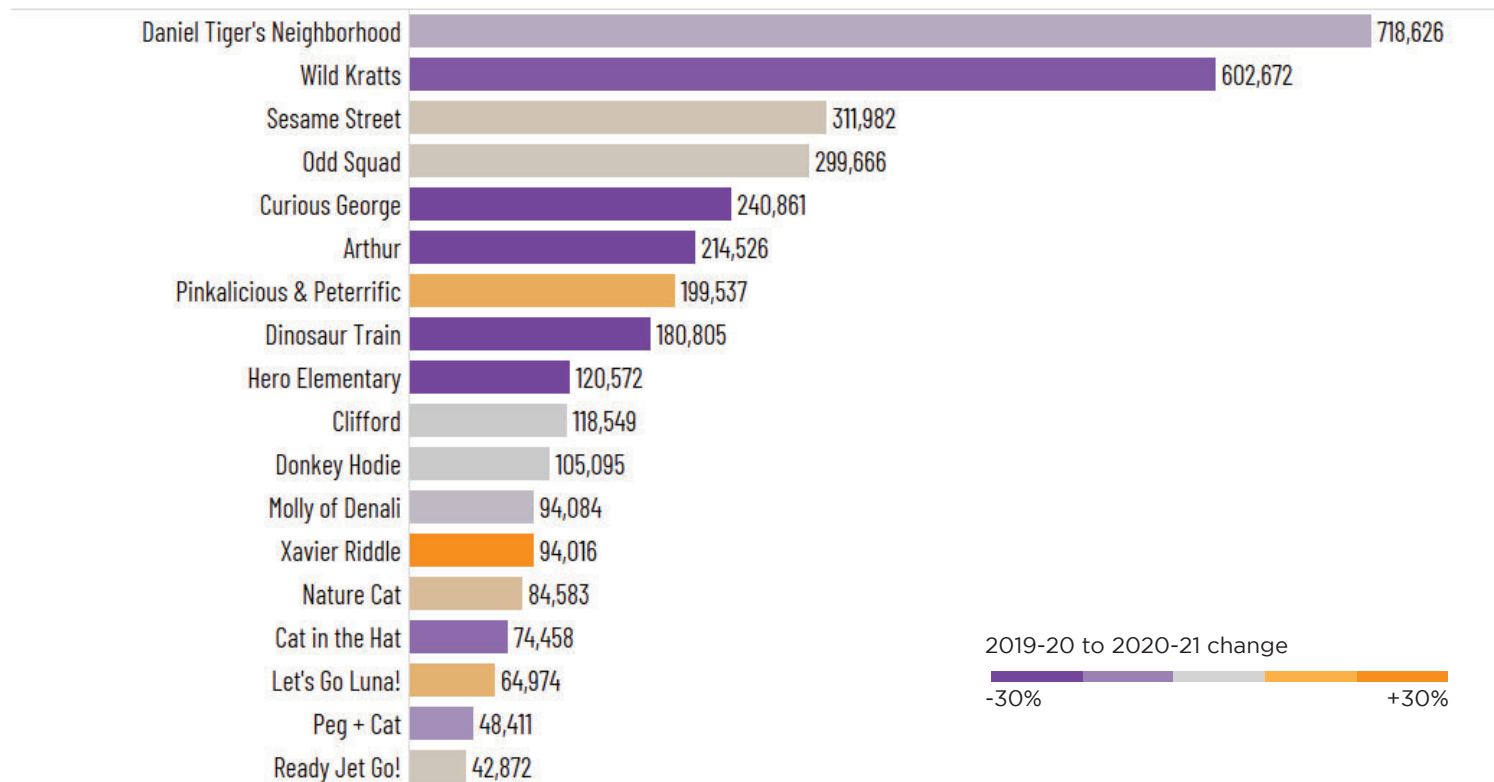
Above-average  
reach on-air with  
**1.3 million**  
kids 2-8 monthly

Averages  
**760,000**  
monthly users on  
pbskids.org

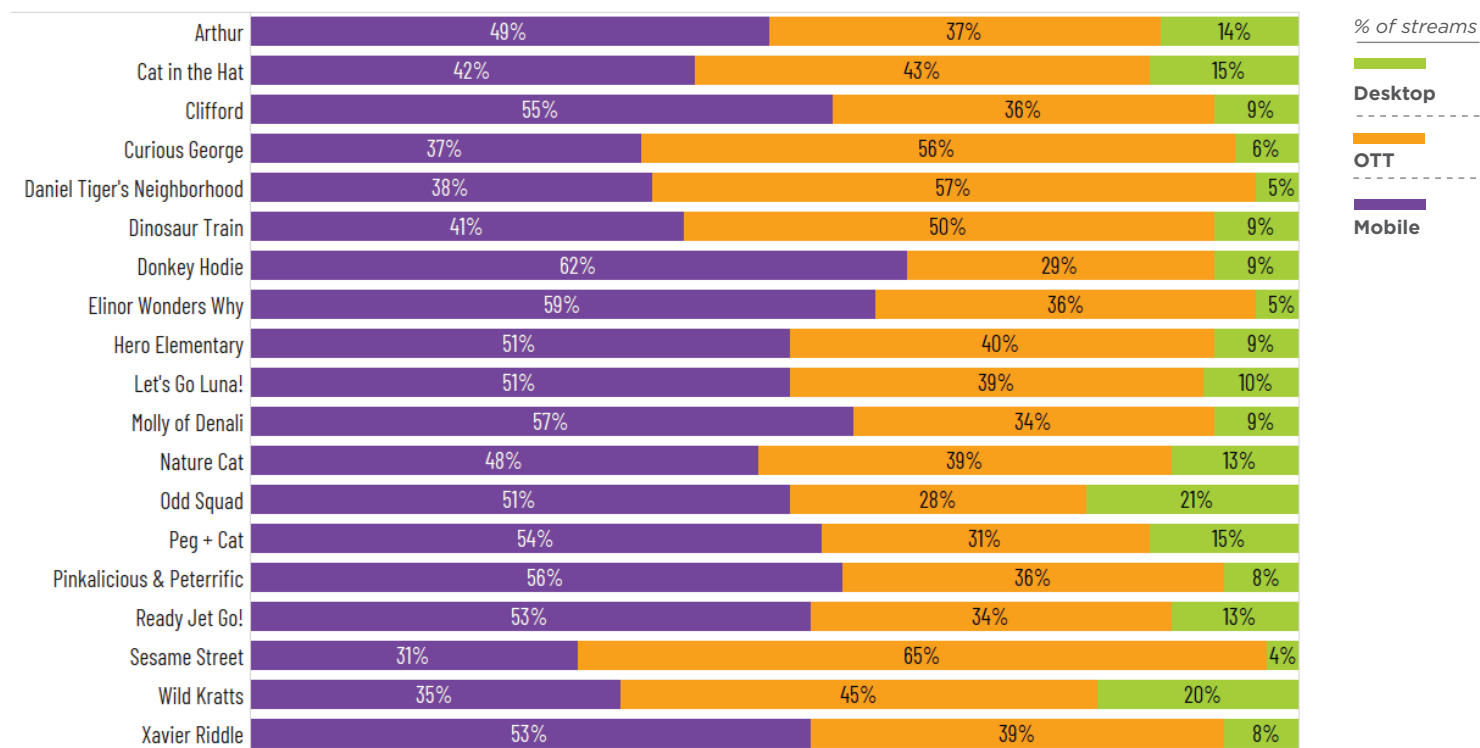


# PBS KIDS SERIES PERFORMANCE STREAMING

## RANKED BY STREAMS (000)

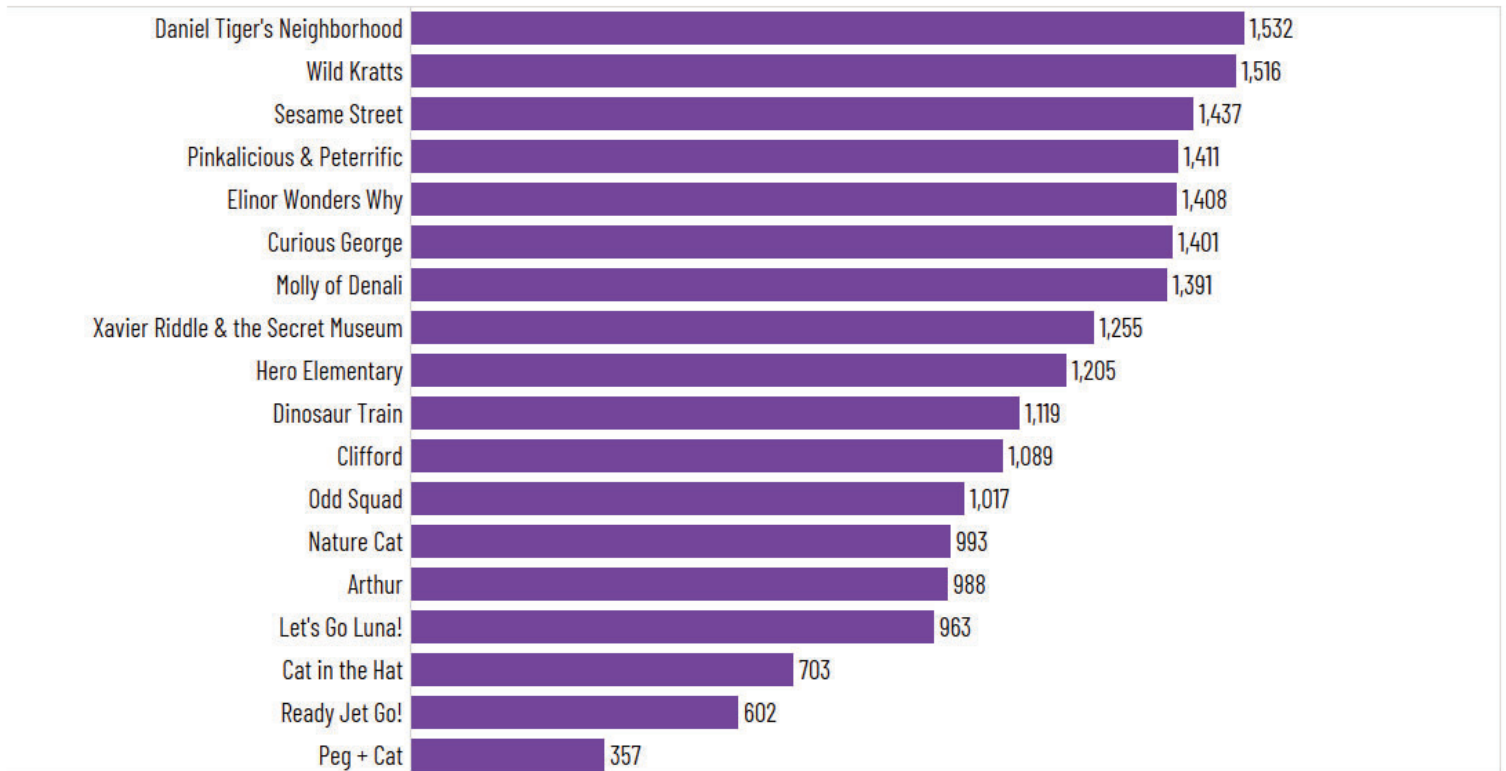


## STREAMING BY PLATFORM

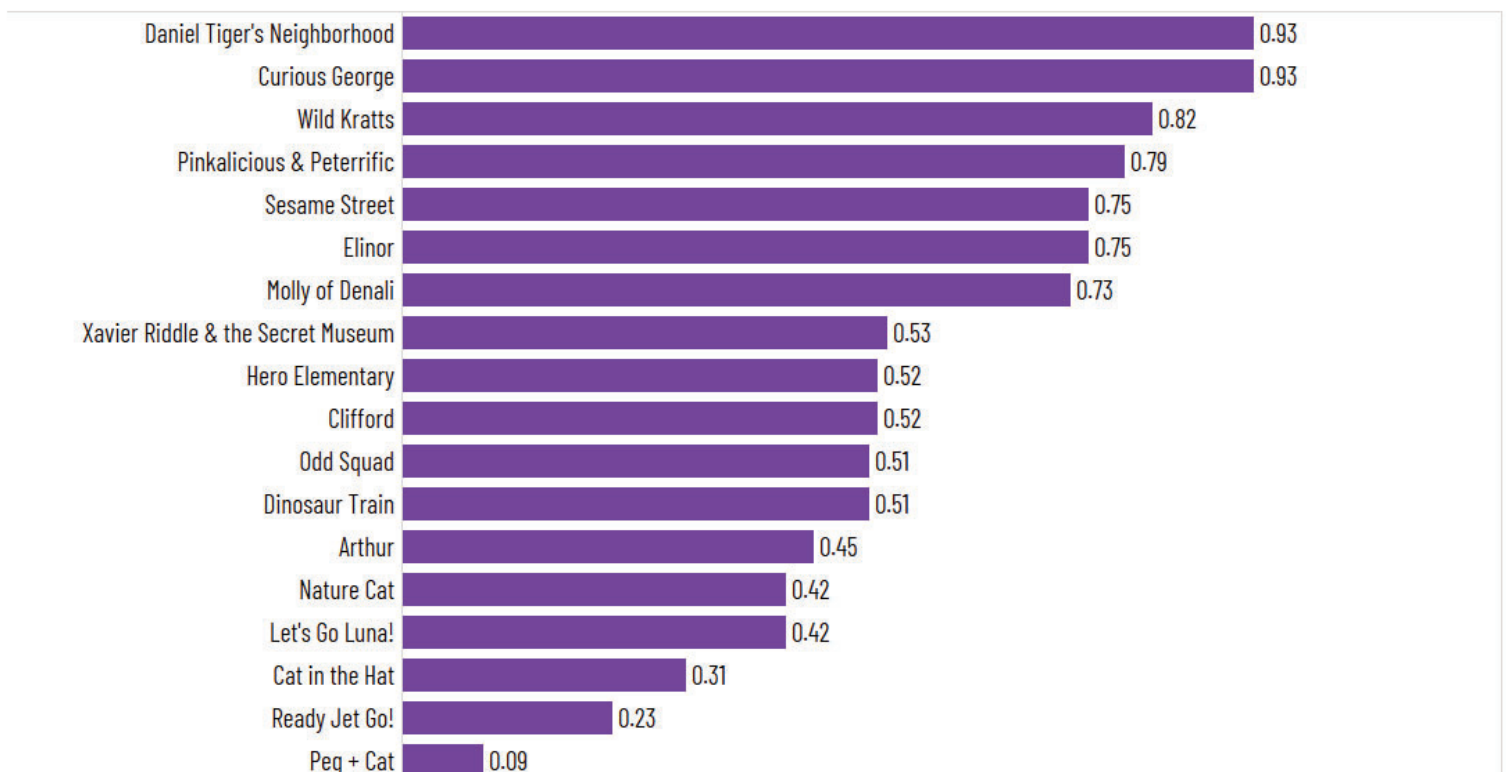


# PBS KIDS SERIES PERFORMANCE BROADCAST

## KIDS 2-8 REACH (000)



## KIDS 2-8 TV SERIES RATINGS





# SOURCES AND NOTES

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## **The Nielsen Company (pgs. 7, 8, 9, 12, 13, 18 - 27, 36 - 39, 41, 43)**

All Nielsen data come from Nielsen's national PeopleMeter sample for Live+7. Nielsen NPOWER program data 9/28/2020 - 2/28/2021; Broadcast season dates: 9/28/2020 - 9/26/21, 9/23/19 - 9/20/20, 9/24/18 - 9/22/19.

For cume data, a 50% unification was used with a 1-minute qualifier for persons aged 2+ (unless noted otherwise).

PBS KIDS analysis (pages 34-43): Live+7 Linear TV data Kids 2-8: Nielsen NPOWER program data 9/28/2020 - 2/28/2021; Time period data and average monthly ratings and reach 9/28/2020 - 9/26/21, 9/30/19 - 9/27/20, 9/28/18 - 9/29/19.

For population and technology trends (pages 10-11), data are taken from the Nielsen Company "Universe Estimate Report" (September 2019 - August 2020).

For Primetime tuning to OTT devices (page 10), data are from the Nielsen Company NPower Live +7 M-Su 8PM-11PM, viewing source = Internet Connected Devices.

For Daily Time Spent Using Media (page 11), data are from the Nielsen Total Audience Report, Q1 2020.

## **Social Media (pgs. 14, 18, 32)**

General social media data from Insider Intelligence US Social Network Users 2022 report. PBS social media metrics (users, views, engagements, and uploads) gathered from YouTube Studio, Facebook Insights, Instagram Insights, Twitter Analytics, and/or Tubular Labs.

## **Google Analytics (pgs. 9, 18 - 21, 28 - 30, 36, 40, 42)**

All streaming information reported from PBS owned and managed digital experiences on pbs.org, pbskids.org, PBS Video for iOS and Android, PBS KIDS Video for iOS and Android, PBS Video app on Roku, PBS KIDS Video app on Roku, PBS Video app on Apple TV, PBS KIDS Video app on Apple TV, PBS Video app on Fire TV, PBS KIDS Video app on Fire TV, PBS Video App on Android TV, PBS KIDS Video app on Android TV, Google Chromecast, Samsung Tizen and VIZIO. Streams are reported via Google Analytics events (e.g., MediaStart event) to PBS owned and managed Google Analytics 360 properties. A stream is recorded at the first second a video is viewed, after pre-roll is complete. Data is shown for programs that aired and were available to stream on the above digital experiences during the Nielsen broadcast season. Unless otherwise noted, all Google Analytics data is from October 2020 - September 2021. For KIDS cross-platform average monthly time period data by device generated from Google Analytics Monthly Users Oct 20-Sep 21 for owned platforms (users), Tubular Audience Ratings Oct 20-Sep 21 for General Audience on Facebook and YouTube, and YouTube Digital Studios (these are Unique Viewers), YouTube Analytics Avg Monthly unique viewers Oct 20-Sept 21.

## **comScore (pg. 37)**

Data rely on comScore PlanMetrix Audience Profile October 2020 - September 2021. PBS KIDS digital audience composition (page 37) generated from comScore Plan Metrix Average Oct 20, Jan 21, Apr 21, Jul 21.

## **Comparisons with metrics found in previous editions of book:**

Reach-based metrics contained in this year's edition of Audience Insight are not comparable to similar metrics published in the book prior to 2017-18. This includes cumulative reach numbers for genres and individual programs as well as program audience affinities. With the 2017-18 book, PBS formally switched from a 6-minute qualifier to a 1-minute qualifier for broadcast reach and duplication statistics.

## **MRI-Simmons**

Survey of the American Consumer, 2020, Doublebase 18+ data.

## **SVOD Summary (pg. 10)**

81 Minutes per day stat is from Insider Intelligence's Time Spent with Subscription OTT Video; HBO Max subscribers are from Insider Intelligence's HBO Max Viewers; 59% of consumers stat is from Hub Research: The Best Bundle 2021 Report Excerpt. Viewer streaming by brand callout adapted from: <https://www.nielsen.com/us/en/insights/article/2021/sports-stillloom-large-and-streaming-content-drives-viewing-growth/>

## **AVOD Summary (pg. 11)**

Parks Associates 2Q21 report, 2020 and 2019 numbers are from Q2 of those years; overall industry AVOD stats from Insider Intelligence's AVOD Viewers report.

## **General Audience Cross-Platform Summary**

Industry stats about social media from Insider Intelligence's US Social Network Users 2022 report.

## **Section 1 Introduction (pg. 7)**

Time spent with media stats from Insider Intelligence's *Time Spent with Media 2021* report; watching favorite show stat from Hub Research's 2021 *The Best Bundle* report.



## HOW TO READ

For the quickest idea of what is in this year's edition of the Audience Insight book, look no further than the Table of Contents (pg. 3). To get the broadest overview of the predominant stories from this past season, begin with the summary pages (pg. 7 for Media Landscape; pg. 17 for General Audience; pg. 35 for PBS KIDS).

General Managers should read the media landscape section (pgs. 7-15) for both cross-platform audience trends as well as a glimpse at what trends may lie ahead. For the programmers and marketers, the audience composition (pg. 19, 24-25) pages may hold specific insights for questions you may have. Those in development may want to spend time with the Passport specific page (pg. 32) for help understanding particular audiences.

## GLOSSARY OF TERMS

**Rating or AA (Average Audience)** - Percent of all TV households (or persons) watching during an average minute of a program or time period.

- For the 2019-20 season, each 1.0 household rating point translates into 1,206,000 households watching in an average minute.
- The Primetime rating includes tuning to all PBS stations, including multi-casts, during an average minute from Monday - Sunday, 8PM-11PM, plus all DVR playback within seven days.

**Cume or Cumulative Audience** - The unduplicated viewers (typically P2+) to a program, series, or genre.

**Percent of Primetime Viewers that Watch** - Of everyone aged 2+ that PBS reached in Primetime, this represents the percentage of that audience that tuned in at least once to the designated program/genre. Percent Viewers That Watch is a measure of program/genre exposure amongst our viewing base, rather than a contribution to the overall PBS Primetime cume.

**Stream** - Any time a video starts playing. If the video includes a pre-roll, a stream is counted only after the pre-roll finishes.

**Livestream** - streaming of PBS digital content at the same time as the linear broadcast

**Episode Stream** - Episode streams are for original broadcasts only and include views for a four-week period after the broadcast TV air date.

**Live+7** - Includes all playback on a DVR within 7 days of the program feed or original time period.

**AVOD** - Ad supported Video On Demand; users can stream video for free but are required to watch ads (e.g., YouTube, Tubi).

**FAST** - Free Ad Supported Television; free online live-streaming TV organized by channel and on a set schedule (Ex: PlutoTV, The Roku Channel).

**SVOD** - Subscription Video On Demand; users pay a recurring fee to access an entire library of content (Ex: Netflix, Hulu).

**TVOD** - Transactional Video on Demand; users can rent/purchase individual pieces of content (Ex: Amazon Prime, Google Play).

**Live+7** - Includes all playback on a DVR within 7 days of the program feed or original time period.

**CTV** - Connected TV; usually the on board operating system of a television that allows for access to streaming services without any additional devices (Ex: a TCL television set with a Roku branded operating system or a Samsung television set with a Tizen operating system).

**VMVPD** - Virtual Multichannel Video Programming Distributor; platforms that deliver live, linear television over the internet (Ex: YouTube TV, Sling TV).

**Cross-Platform Average Minute Delivery (AMD)** - A proprietary PBS metric that aggregates the number of viewers watching a particular program - across both linear and digital platforms - during any given minute. For those familiar with AA delivery as a standard Nielsen measure, AMD is simply an extension of this concept that includes all available sources of viewing.

**Time Spent Viewing Per User** - The sum of all viewing minutes divided by the number of users contributing to that viewing total

# Audience Insight 2021 Annual Report

This is the 10th edition of the Audience Insight annual report, designed to provide Public Television leaders—from programmers and general managers to marketers and development professionals—a detailed overview of how PBS's National Program Service performed in the most recently completed television season across both linear television and digital platforms.

This book covers a 52-week period beginning September 21, 2020, and ending September 19, 2021. This edition also provides information about the broader media landscape, consumer trends, and emerging cross-platform media usage among the US population.

Featured in this year's edition:

- A spotlight on diverse audiences
- Special pages for *Ali*, Passport, and PBS KIDS programming
- Forecasts and emerging trends
- A note on Nielsen measurement

For a downloadable PDF of the book, please login to the Hub:

<https://hub.pbs.org/business-intelligence/homepage>

For additional copies or more information about PBS Business Intelligence, contact Gale Malloy at [gmalloy@pbs.org](mailto:gmalloy@pbs.org)



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