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2005 Consumer Insight Research on Primetime Public Television

**The Changing Viewing Landscape and
the Role of Documentary and Performance
Programming in the NPS**

January 2006

A Summary of Research Commissioned by



Corporation
for Public
Broadcasting

Research Designed and Implemented by:



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Two distinct but similar qualitative consumer insight studies were fielded during Spring 2005. They were commissioned in connection with the 2005 Framework for a Public Television Primetime Strategy, which made it a priority to fill important learning gaps pertaining to public television programs traditionally thought of as falling within the “performance” and “history” genres.

As it turns out, the research produced strategically-relevant information not only about how viewers use programming within these genres specifically, but also about the continually evolving state of the primetime television viewing landscape.

The research consisted of 36 focus groups in 9 different markets (Austin, Baltimore, Boston, Denver, Los Angeles, New York, Raleigh, San Diego, and the Twin Cities) Nearly 300 adult primetime viewers participated in the study. The digital recordings of the actual groups, full transcripts of each discussion, and tabulations of the responses that participants committed to paper during the research were thoroughly analyzed and played an important part in the updating of the Strategic Framework for 2006.

This palm card contains highlights of the learning.

1. How Viewers Map the Viewing Landscape. “Performance” and “history” do not exist as such as viewer categories for programs watched and enjoyed. Programs that public television insiders might consider to be “performance” showed up as “music,” “arts,” or “specials” rather than as “performance.” And programs that might be considered “history” show up in viewer sorting as “documentaries” or “learning.”

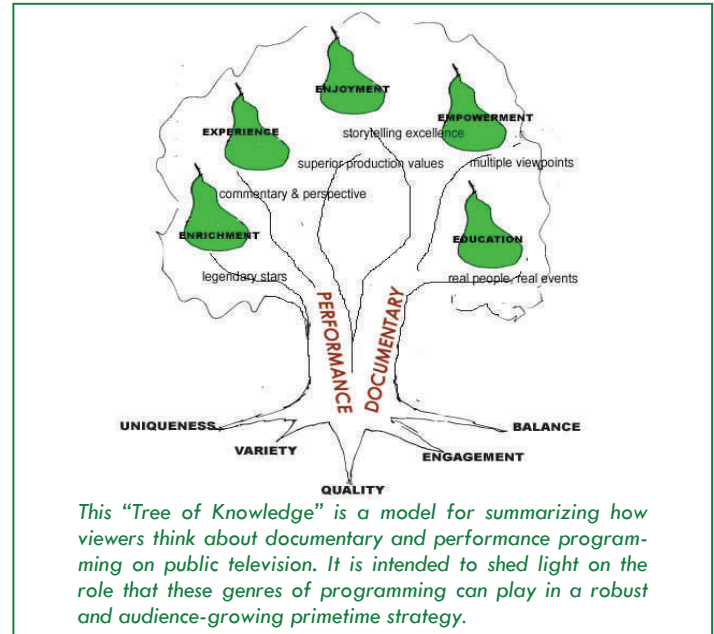
2. Technology’s Role in Shaping the Landscape. There was ample evidence in this research that access to the multiplicity of digital services continues to expand, and along with it, new modes of navigation, especially the Interactive Program Guide (IPG). The impact is especially strong in the genres this research was designed to investigate. Much of the viewing of documentaries and performance appears to be occurring more by chance than by design, and viewers with digital cable and/or satellite are increasingly uncertain about where they actually saw something and how to find it again. Moreover, channel surfing is increasingly focused on specific neighborhoods of digital service (e.g., “the 300s where all those learning programs are”). A deep understanding of viewer navigation and search strategies will be essential for reaching target audiences.

3. Dissatisfaction and Appetite. Though digitally-equipped viewers have more options than they ever had, few seemed entirely satisfied with what’s available. The evidence suggests that there is less appointment viewing now than there was even two years ago, with virtually no mentions of any “must-see” night of television and fewer mentions of specific series which claim weekly allegiance. Many perceive the quality of what is on the major networks—and even some of the commercial cable services—to be deteriorating, and report an appetite “for something more,” “for television that I can learn from.”

4. “Events” not “Programs;” “Experiences” not “Brands.” Although all viewers in these groups pre-qualified as having a credible interest in the genres in question, ongoing series and program brands within these genres did not emerge strongly in the unaided recall exercise which began every group. Viewers who had definitely seen a PBS program often misidentified it with another program service, and many expressed disappointment that they had missed several PBS programs they would have enjoyed watching. Although they see PBS as a premier provider of this sort of programming, something about the way the service is structured in these genres specifically has made it difficult for them to develop durable viewing habits.

5. Opportunity in the Current Landscape. The research suggests that the opportunity for public television is as great as it’s ever been: Less appointment viewing on the networks, an increasing desire for programming from which viewers can learn something, and diminishing faith that the cable services previously once relied upon to provide good alternatives will continue to do so. In this setting, the continuing relevance of public television’s core mission cannot be ignored. Careful strategic thinking about the programming that public television does in the “documentary” category can serve not just to halt a decline but to stimulate growth.

6. But, not all Opportunity is Created Equal. Heavier users of public television (i.e., the viewer/member base) are more aware of PTV’s programs in the documentary and performance genres and more actively engaged with them than viewers in the other segments. There’s clearly more leverage in the base than in an effort to recruit the disengaged.



ROOTS

Five of the ten viewer principles established in the 2004 NPS research have particular relevance for these specific categories of programming. **Quality** serves as the non-negotiable taproot for both. **Uniqueness** and **Variety** anchor the service in the performance area, as **Engagement** and **Balance** are the source of PTV’s excellence on the documentary side.

BRANCHES

The one tree of knowledge and life that represents public television branches in several directions, two of which are illustrated here. In terms of performance programming, value is delivered to viewers by means of access to **Legendary Stars**, whom viewers might not be able to experience any other way. But viewers also value the **Commentary and Perspective** which enriches their appreciation of a work of art—something of a “performance plus.” And they also prize the **Superior Production Values** by which they distinguish that which is up to PTV’s quality standard from what they often see elsewhere.

In terms of documentary programming, viewers are gratified by the access public television provides to compelling narratives of **Real People and Real Events**. The fact that these narratives are delivered from **Multiple Viewpoints** gives them a credibility and dimension they wouldn’t otherwise have and delivers on the principle of Balance. Most of all, it is the **Storytelling Excellence** they experience in PTV’s best documentary programs that fulfills their quality expectations and makes this material fully engaging and relevant.

FRUITS

Consistent with the oft-stated fact that viewers look specifically to public television to provide them rich, nutritious food (as distinct from the junk food they find elsewhere on television), it’s useful to think of this PTV tree as yielding a harvest for viewers. From the performance programming especially, they derive **Enrichment** and have an **Experience** they might not have any other way. From documentary fare they get **Education** and **Empowerment**. And from both genres they derive **Enjoyment**—not just mindless entertainment, but a pleasurable, satisfying, life-giving experience.