

**Framework for a Public Television Primetime Strategy  
2007 Edition**

**Final**

**The Outcome of a Consultative Process Led by:**

**The Corporation for Public Broadcasting**

**May 11, 2007**

## PROLOGUE

More and more, viewers are searching for television programs that they can learn from.<sup>1</sup> The perceived value of non-commercial, locally-owned, educational television is as great as it's ever been.<sup>2</sup> Viewing levels for the icon series have stabilized after years of free-fall.<sup>3</sup> And the leadership of PBS, NPR, APTS, and CPB are aligned to meet the challenge of the digital age.

Public television appears to be on the eve of a renaissance, and it is leveraging this rare moment of opportunity through a collaborative approach to primetime program strategy informed by quality research.<sup>4</sup>

This 2007 Edition of the Framework for a Public Television Primetime Strategy represents a commitment on the part of the Public Broadcasting Service [PBS], the Corporation for Public Broadcasting [CPB], the producing entities responsible for the content of the National Program Service [NPS], and leaders in the local station community to do the following:

- See current strategic initiatives through to their completion.
- Launch a limited and realistic number of new strategic initiatives.
- Measure and monitor the impact of these strategic activities into the foreseeable future.

**The Process.** Since May 2006, when the findings of the most recent Awareness, Attitudes, and Usage [AAU] study became available,<sup>5</sup> a group of system leaders representing a wide range of disciplines has been meeting on a regular basis. At these gatherings, the advisory group studied the findings from the most recent strategic research, reviewed progress reports of initiatives called for by previous editions of the Framework, and considered feedback gathered from public television professionals at a number of open meetings over the course of the year.<sup>6</sup>

**The Priorities.** As a result of this process, five strategic priorities have been defined for the coming year. These priorities will help guide the investment of resources and the direction of activities related to the NPS on both the national and local level:

1. Fulfill commitments made to launching the new science series and strengthening the core branded offerings.
2. Continue and extend efforts to make public television programs more accessible for audiences navigating a complex digital landscape.
3. Make the historical documentary and natural history genres the next areas for special investment consideration.
4. Complement the current focus on the Innovating & Inclined with parallel efforts to build frequency and loyalty among the audience segment known as the Enthusiastic & Open.
5. Create a sustainable model for continuing strategic audience research and measuring performance.

**The Context.** The designation of these five—as opposed to the numerous other priorities that competed with them for consideration—was not undertaken lightly. Literally thousands of pages of statistical data, hundreds of hours of qualitative viewer input, and the experience of the strategists opened up a broad field of possibilities. It was not always clear where to begin, given the profound impact that digital technologies are having on the way viewers access television content.

The strategists relied on certain compass points to find their course in largely uncharted territory.

**NORTH.** First and foremost are the ten core audience principles, as valid today as when they were first identified in 2003. “True North” for program strategy is the realization that viewers trust public television to deliver content of the highest quality: a varied, unique and engaging mix of programming that respects their intelligence and is balanced in its approach.

**SOUTH.** The strategists were also oriented by the main objectives which give purpose to the framework: expanding public television’s reach, increasing the frequency with which those already reached are actually watching public television, and building the loyalty of public television’s viewers—especially in terms of financial support for their local PTV stations.

**EAST.** Thinking of the national primetime audience in terms of distinct audience segments—each with its own profile and a strategic goal appropriate to it—also helped the strategists to maintain direction and focus. In the case of those segments of the audience where attitudes toward and usage of public television are strong, the goal is to stem erosion and eventually to expand this viewer-member base. In the case of those segments of the audience where attitudes are positive, but behavior (both viewing and membership) is inconsistent, the goal is to increase time spent viewing and the level of financial support. And for those viewers who currently have no meaningful connection with public television, the goal is to make it a welcoming place, so that as their needs or interests develop, they will be able to find a home in their local PBS station.

**WEST.** Finally, the strategists were profoundly aware that they were not beginning from scratch. Numerous initiatives driven by previous editions of the strategic framework are already underway, not to mention the other independently-originated activities designed to meet the same goals. There is strong agreement that any new priorities or activities need to complement rather than replace the work in progress.<sup>7</sup>

With this compass, the strategists were able to find their way through vast and sometimes confusing territory, arriving at the five priorities that the following pages describe in detail.

## PRIORITY ONE

### **Fulfill commitments made to launching the new science series and strengthening the core branded offerings in the primetime NPS.**

#### **The Activities**

- a. Apply newly-acquired viewer insight to the production and promotion of *Wired Science* for a successful launch.<sup>8</sup> Develop and apply concrete and specific benchmarks for program success and diagnostic tools to optimize performance over time.
- b. Continue and complete implementation of Opportunity Grant-funded initiatives relating to *Masterpiece Theatre*, *NATURE*, and *NOVA*. Measure and report to the system the effectiveness of each initiative relative to their respective aims and determine appropriate next steps for each. Begin implementation of the Opportunity Grant-funded initiatives relating to the *NewsHour*.
- c. Utilize existing models for program-specific primary research<sup>9</sup> to launch parallel initiatives for other icon offerings that have not recently fielded substantial, high quality, viewer-centric audience research.

**The Background.** Among the initiatives derived from the strategic research of the past three years, none have inspired as much anticipation across the system as the launch of a new science series on PBS. By giving science-interested viewers a second weekly opportunity to check into the primetime NPS, public television has a chance over time to make measurable gains in both reach and frequency. When *Wired Science* premieres in the Fall of 2007, it will be the first new ongoing series to be launched on PBS since *History Detectives* launched in 2002.

At the same time, additional investments made in several of the icon series—titles that have proved durable for public television’s viewer-member base—are making it possible for these assets to maintain freshness and relevance for future audiences. Early indications are that March’s *Masterpiece Theatre* retrospective was a strong pledge offering, and the series is now in the process of collaborating with PBS in a re-branding that will make it easier for viewers to find and remember the kinds of *Masterpiece Theatre* and *MYSTERY!* that they enjoy most. *NOVA* and *NATURE* are also in the process of launching their own strategic initiatives underwritten by joint PBS-CPB Opportunity Grants.<sup>10</sup>

Even those icon series not originally identified for special attention in previous Frameworks have been inspired to undertake their own efforts to improve their relevance and satisfaction among viewers. *American Experience* is preparing to launch a thoroughgoing assessment of its own brand and assets to identify specific ways in which it can be more effective in satisfying the audience’s strong appetite for the historical documentaries which are its stock in trade.<sup>11</sup> *Washington Week* too has just completed a thorough qualitative and quantitative audience research initiative that will result in a planned renovation of the series marking its 40th anniversary.

## PRIORITY TWO

### **Continue and extend efforts to make public television programs more accessible for audiences navigating a complex digital landscape.**

#### **The Activities**

- a. Complete implementation of the Navigation Best Practices process.<sup>12</sup> Monitor and report to the system the effectiveness of the best practices as implemented.
- b. Allocate Opportunity Funds to continue the icon series promotion initiative. This would make it possible to build on momentum already achieved, without compromising the NPS-funded promotion required to support the launch of *Wired Science* and other pop-outs in the 2008 schedule. The continuation of this initiative would be accompanied by ongoing and careful measurement of its impact over time and serious exploration of other promotional options, informed by a thoroughgoing knowledge of industry best practices.
- c. Launch a coordinated effort—involving PBS, CPB, and local development leaders—to integrate knowledge about member acquisition, retention, and renewal with knowledge about PTV primetime audience segments. Field additional primary research as necessary.<sup>13</sup>

**The Background.** As viewers' options continue to expand—both in terms of the numbers of channels of available programming and the variety of methods for consuming content—the task of removing the obstacles that get in the way of viewers finding and remembering the PTV programs that match their appetites becomes more urgent than ever. The analog-digital transition complicates the situation, particularly in those broadcast-only households where some of PTV's most avid viewers currently reside.<sup>14</sup> Accessibility sits near the top of the priority list for a third year in a row not because no progress has been made, but because the need to cultivate durable PTV viewing habits continues to be great.<sup>15</sup>

Thanks to CPB-funded research, we know a great deal about the television and mobile technology that viewers have and use, as well as some of the tactics they have developed to navigate their way through the crowded digital landscape.<sup>16</sup> A process that will result in a set of Best Practices to guide the way in which PTV programming is listed and featured in electronic program grids is now underway and, it is hoped, will result in a set of concrete steps that can be taken on both the national and local level by early 2008.

At the same time, on a trial basis, the PBS Brand Strategy and Promotion team launched its Icon Series Campaign focusing on the most consistent parts of the primetime schedule. The goal was to make sure that PBS stations remain among the options that viewers consider when they're deciding what to watch. Phase one began in September 2006 and ran through November 2006. Because of the outstanding success of the effort—a combined series average increase of fifteen percent over last year for the six series promoted—a second and third phase were rolled out in January and April of 2007.<sup>17</sup>

On top of all this, there is a growing awareness across the system that some standard pledge practices are complicating the accessibility challenge: presenting a fundamentally different brand image during major portions of the year and making it more difficult for viewers to master the core schedule. Although there are no easy answers, and insuring the financial stability of local stations is fundamental, there is now widespread agreement that the time has come to take at least one prudent step forward (see Activity C) in aligning pledge programming and messaging with the overall NPS strategy. Such a step will serve not only to stem erosion in primetime viewing but lend support to public television's precious assets, its loyal members and its highly-regarded and deeply-trusted brand.

### PRIORITY THREE

#### Focus on historical documentaries and natural history as the next genres for special investment consideration.

##### The Activities

- a. Undertake a complete audit of history assets in the public television system. The audit would cover the two most recent seasons, review assets by the number of hours dedicated to specific titles and topics, encompass local productions and acquisitions as well as the NPS, and include both ongoing and limited series. It would be complemented by a thorough competitive assessment of what other content providers are offering in the same category.
- b. Undertake a comprehensive analysis of recent scheduling and promotion practices relating to these assets to determine what correlations exist between specific practices and the performance of specific titles and formats (e.g., stand-alones, mini-series, anthologies).
- c. Determine, on the basis of the analyses and initiatives listed above, how better to manage the current assets and whether and how specifically to expand the history footprint in the NPS. Better management of current assets includes, though is not limited to, developing strategic initiatives to optimize the performance of ongoing historical documentary titles already within the schedule: *American Experience* and *American Masters*. It also includes examining more closely the role of *History Detectives* within the schedule, with a view to determining what audiences it can reasonably be expected to reach and what appetites it can reasonably be expected to meet in the future.
- d. Launch, as resources permit, a parallel analysis relative to the natural history genre.

**Background.** Two of the three audience segments most closely aligned with public television heavily use historical documentaries and express a strong appetite for more on PBS. The Measured & Engaged in particular express as strong an appetite for more historical documentaries and biographical programs on PBS as the Innovating & Inclined have expressed for additional science programming.<sup>18</sup>

In spite of the fact that the NPS already delivers a sizeable amount of historical documentary content, the performance of programs within this genre—especially among the ongoing series—doesn't seem to square with the expressed appetite for more history on PBS.<sup>19</sup> And some recent historical content that has performed relatively well appears not to satisfy viewers' appetite for historical documentaries specifically.<sup>20</sup> Although the time may be ripe for a new ongoing series in the historical documentary category, there is evidence that the way existing assets are managed may be as critical a factor as the size of the history footprint in the overall schedule.

Similarly, the usage of the nature genre among the Measured & Engaged and the Enthusiastic & Open is well above average, with the latter expressing as strong an appetite for more nature programming on PBS as the Innovating & Inclined have for science.<sup>21</sup> However, the issues surrounding natural history are subtly different from those surrounding historical documentaries. In the case of nature, an Opportunity Fund grant has already been awarded to the series *NATURE*, and the system awaits the results of efforts now underway to refresh and revitalize that brand. Moreover, alert to the strong appetite among viewers for high quality *NATURE* programs, system programmers have already begun to make acquisitions of their own. While additional investment in the nature genre is not out of the question, the priority for the near-term is history.

## PRIORITY FOUR

**Complement the current emphasis on the Innovating & Inclined with parallel efforts to build loyalty and viewing frequency among the audience segment known as the Enthusiastic & Open.**

### The Activities

- a. Focus efforts to understand viewers' approach to TV technology and navigation specifically on the Enthusiastic & Open so as to ensure that their local PBS stations are among the channels they consider regularly when searching for something to watch.
- b. Focus efforts to strengthen the performance of history and nature assets on this segment specifically, with the aim of halting erosion and restoring their perception of PBS as a unique program service.
- c. Conduct qualitative research that would obtain for public television the same kind of deep understanding of the lifestyles and values of the Enthusiastic & Open that recent research with the Innovating & Inclined achieved.<sup>22</sup> This research initiative could potentially be coupled with research designed to identify concrete and specific ways of improving membership levels in this and other segments.

**The Background.** Although there is strong evidence that the Innovating & Inclined<sup>23</sup> continue to be a prime target of opportunity for increasing time spent viewing primetime public television and local station loyalty, there is now evidence that another audience segment is also in need of special strategic consideration: the Enthusiastic & Open.<sup>24</sup>

Whatever erosion has occurred since 2004 in time spent viewing, local station membership, and PBS brand standing appears to have taken place primarily among these viewers specifically.<sup>25</sup> The reason is not a diminished appreciation for public television's quality or for its educational or entertainment value, but the simple fact that—as the number of channels of programming available to these viewers has increased—the likelihood of public television getting lost in the shuffle has grown along with it.

Because the Enthusiastic & Open represent 17% of the primetime audience as a whole and half of public television's viewer base, what happens within this segment cannot be ignored without peril to public television's future. Moreover, the gravitational pull of high definition television is very strong in this segment. Taken together with the fact that they are "TV Influentials" (i.e., viewers so enthusiastic about what they like on television that they're likely to tell others about it), it becomes clear just how important these viewers are.

Fortunately, primary research has revealed certain characteristics of the Enthusiastic & Open that can be utilized in the crafting of a stratagem for reaching them. For example, since their diminished usage of public television and declining conviction about public television's uniqueness are most likely a function of the increase in the number of channels they can receive, an improved understanding of how viewers navigate their program choices will be particularly useful in reaching them (Priority Two).<sup>26</sup> The fact that their affinity toward nature and history are high suggests that the resources applied to Priority Four can be especially impactful among them.<sup>27</sup> And efforts to align research relating to membership, pledge, and development with the strategic research designed to inform program strategy (addressed in Priorities Two and Five) ought to be of particular value in this segment, where there is a measurable opportunity to grow membership.<sup>28</sup>

## PRIORITY FIVE

### **Create a sustainable model for continuing strategic audience research and measuring performance against strategic benchmarks.**

#### **The Activities**

- a. Continue to fund and support the audience research initiatives necessary to the ongoing refinement of the NPS strategy. This includes, though is not necessarily limited to (i) the biennial primetime Awareness, Attitudes, and Usage and Segment Tracking study,<sup>29</sup> (ii) ad hoc qualitative research initiatives to inform consideration of new strategic questions,<sup>30</sup> and (iii) public television's participation in the annual home technology survey and other special technology-related surveys as warranted.<sup>31</sup>
- b. Continue to fund and promote systemwide participation in the facilitated consultative process whereby audience research is translated into “working knowledge,” and working knowledge is used to inform NPS Strategy.<sup>32</sup>
- c. Launch a prototype research collaboration between PBS and CPB designed to understand the impact of current pledge practices on giving and viewing, drawing both on the strategic audience segments that have shaped the NPS strategy and on the data currently stored in typical member databases. This research would be used to inform a plan for better aligning pledge programming, scheduling and messaging with the regular primetime NPS.<sup>33</sup>
- d. Create, under the auspices of CPB and PBS jointly, a PTV Research Advisory Board<sup>34</sup> to undertake a comprehensive audit of resources currently dedicated to audience research at both the national and local levels. The ultimate goal would be (i) recommending a model for ensuring the consistency and sustainability of strategic audience research into the future and (ii) facilitating a greater degree of information-sharing and collaboration among those currently fielding the research used by PTV.

**The Background.** It is widely acknowledged that a major reason for the support that recent strategic initiatives have received is the extent to which they have been informed by high quality audience research. With a substantial body of reliable evidence as a common reference point, the otherwise difficult work of building consensus and achieving buy-in has been greatly facilitated.

Moreover, the power of the research to inform and guide the strategic planning process has been a function of the way in which the data has been communicated. By translating the information into user-friendly formats and exploring the potential implications in a carefully-facilitated group process that ensures that all voices are heard, it has been possible to achieve outcomes that reflect values and commitments held throughout the public television system. Together with the grants that CPB has provided to support the acquisition and installation of new Nielsen encoders at the local level, these research initiatives have helped to improve the quality of data used to make both tactical and strategic decisions.

Successful as these research initiatives have been, no model or structure currently exists to ensure their continuation into the future. Moreover, the important task of synching up the methods and models used in the primary research that supports this framework with other forms of research taking place across the PTV system has only just begun. An explicit commitment to the continuation of strategic audience research and the development of a mechanism for insuring the sustainability and relevance of that research into the foreseeable future can help to address these needs.

## IMPLEMENTATION

The agenda represented by these five priorities is ambitious. If the various organizations and individuals responsible for the activities suggested by the framework clearly understand their roles, and are willing to commit their human and financial resources to the tasks for which they are responsible, this agenda is also realistic.

It falls to leaders at every level—general managers and programmers, producers and program executives, professionals involved in the full range of disciplines from pledge to promotion—to determine exactly how to staff and fund the several initiatives laid out here. However, broadly considered, the roles and responsibilities of the various partners in public television can be delineated as follows:

**Local Stations.** Insofar as there would be no PBS without the local stations who constitute it, local participation in the implementation of these priorities is foundational. That participation begins with continued financial support for the NPS in the measure that these strategic initiatives result in measurable improvements.<sup>35</sup> Local participation also includes reasonable efforts to implement at the local level the core principles and goals of public television that under-gird this framework. This pertains especially to the accessibility challenge—i.e., removing the obstacles standing in the way of viewers building durable viewing habits around public television programming. General managers, programmers, and others who work daily at the local station level will participate in

- the process to develop and implement Navigation Best Practices,
- the Research Advisory Board to ensure the sustainability and consistency of PTV research into the future,
- the efforts designed to put program strategy, development strategy, and pledge practices on mutually-supportive footing.

**PBS.** As the national organization established to serve local stations with high quality programming and a portfolio of other resources to support their mission, PBS is expected to implement on a national level the core principles and goals outlined in this document. This begins with evolving a content strategy that is consistent with the Framework, but it also includes aligning national scheduling, promotion, and development practices with what has been learned about audience attitudes and behaviors. This year, in particular, PBS will assume responsibility for

- the successful launch of the new science series,
- collaboration with icon series producers in the various initiatives to strengthen the core series,
- all activities designed to improve the performance—and possibly the expansion—of PTV's assets in history and nature.

**CPB.** As steward for the hard-earned dollars of taxpayers across the United States, CPB exists because it is in the public interest that television viewers continue to enjoy an educational and enlightening alternative to commercial media. By continuing to convene and manage the process that generates the annual Strategic Framework and providing leadership and staffing for the major primary research that informs it, CPB does its part to ensure the continued vitality and relevance of public television in America. This year in particular, CPB will

- lead the Navigation Best Practices process to successful completion,
- launch primary qualitative research to inform strategy relative to the Enthusiastic & Open,
- begin laying the groundwork for the 2008 Awareness, Attitudes, and Usage and Segment Tracking Study.
- CPB will also take the lead in the establishment of a PTV Research Advisory Board under its auspices and that of PBS.

**PBS and CPB Jointly.** Together, CPB and PBS will continue to collaborate in the administration of Opportunity Fund and NPS Strategic Growth Fund grants, not only seeing current projects to completion but also finding a way to dedicate additional resources to efforts in promotion that would help to maximize and magnify the impact of strategic programming efforts. In addition, both organizations will pool resources and collaborate in the effort to find a way of aligning current knowledge about members and membership with knowledge about the strategic audience segments, so that program strategy and strategies associated with pledge and membership can become more mutually supportive.

Finally, the producing community, whose artistry and resourcefulness are responsible for the superior content for which public television is known, own the pivotal role of translating strategic vision into television. By incorporating the viewer's perspective in their efforts to maintain the freshness and relevance of their programs and participating in efforts to make it easier for viewers to find and enjoy their work through development and implementation of Best Practices, PTV's primetime producers will do their part to ensure that public television will continue to fulfill its core mission of enriching the lives of Americans with content that informs, inspires, and delights.

## ENDNOTES

<sup>1</sup> This strong appetite for “programming that I can learn from” originally surfaced in Summer 2005 through qualitative research into the usage of history and performance programming on public television. The 2006 Awareness, Attitudes, and Usage [AAU] study, using a national probability sample of 1,509 adult primetime television viewers, confirmed the finding. Among all adults, the desire “to learn something new” ranked second among seven possible reasons for watching television in primetime. Among public television’s core audience and members, it was the top reason for viewing. (The qualitative study was designed and fielded by City Square Associates [CSA]. The quantitative study was designed and fielded by Knowledge Networks/Statistical Research [KN/SRI]. Information on these two studies are available from CPB; go to [www.cpb.org/stations/npsresearch](http://www.cpb.org/stations/npsresearch).)

<sup>2</sup> In the recently-released results of the GfK Roper Public Affairs & Media poll, PBS ranked first for trustworthiness and first in tax value among 20 federally funded services and institutions. This is consistent with the findings of CPB’s 2006 AAU where 64% who named a PBS station that they watch agreed strongly that they “trust it to present programs that place viewers’ interests first.” This compares with only 31% who strongly agreed to the same statement relative to the broadcast network they watch most often.

<sup>3</sup> On a self-reported basis in the CPB AAU Studies, past-month viewing of six out of ten ongoing series titles was either level or increased from 2004 to 2006. NSI data (Nielsen Station Index, an unweighted average of the rating on the primary PBS station in each of the 55 metered markets) parallels the self-reported data closely. The primetime average has held steady at approximately 1.7 over the period corresponding to the CPB research. Three of ten icon series titles improved performance by anywhere from 15 to 39 percent in January-February 2006 over the same period in 2004: *Frontline*, *Great Performances*, and *American Experience*. Of the remaining titles, most were unchanged over the same period, with only the series *NOVA*, *Antiques Roadshow*, and *NOW* posting statistically significant declines.

<sup>4</sup> The first Framework for a Public Television Primetime Strategy was published in Spring 2005 as an outcome of a process that began late in 2003. The second edition of the Framework was published in Spring 2006. A detailed description of the history and structure of the process follows these notes.

<sup>5</sup> This study was commissioned by CPB as one part of its ongoing effort to support the development of a primetime program strategy for public television. The study was a telephone survey conducted by KN/SRI in January and February of 2006 among a national probability sample of 1,509 adult primetime television viewers. It was modeled on a similar study fielded in 2004, making it possible to identify trends in viewer’s attitudes toward television—especially public television—and their viewing behavior. The 2006 version of the study was enhanced through a refined set of questions relating to television genres and motivations for watching television. A copy of the survey instrument is available from CPB and summaries of the findings are contained in a series of booklets downloadable from CPB’s website (go to [www.cpb.org/stations/npsresearch](http://www.cpb.org/stations/npsresearch)).

<sup>6</sup> The two consultative groups responsible for the Strategic Framework—the Station Advisory Group and the Strategy Group—began their work on the current edition in December 2005, contributing feedback to the process whereby the questionnaire for the 2006 AAU study was developed. Once the findings from that study became available, these groups participated in a series of on-site meeting in Washington, DC and conference calls during which they reviewed findings, identified zones of potentially impactful strategic activity, and established the strategic priorities outlined in this document. Major meetings of these two groups took place on May 9, June 23, September 12, and October 10 of 2006 and February 9 of 2007. Feedback on the research and the emerging strategic implications was obtained in a series of workshops and meetings with programmers, general managers, producers, and other PTV professions including the following: the PBS Development Conference (October 4, 2006, Baltimore), the combined PBS-CPB Round Robin Meetings (October-November 2006), the Public Television Programmers’ Association Meeting (November 8, 2006, Amelia Island), the PBS Content Summit (January 16, 2007, San Francisco), and the NETA Conference (January 27, 2007, Norfolk). A first draft of the 2007 Framework was distributed to members of the Station Advisory Group and Strategy Group for review and comment on March 9, 2007. A second draft, revised on the basis of the feedback gathered from those two groups, was distributed to Affinity Group Coalition members for review on April 11, 2007. The final draft reflects their input.

<sup>7</sup> A chart summarizing the specific activities and initiatives driven by the NPS Strategic process since Spring 2005 appears at the end of this booklet.

<sup>8</sup> In connection with the process for selecting and developing a new weekly science series for PBS, CPB funded a comprehensive audience research process consisting of three major components: (a) A qualitative research project consisting of a combination of in-depth interviews and focus groups across the country to obtain a deeper insight into the profile of the target audience for the series (i.e., the Innovating & Inclined) and a better understanding of the science appetite, (b) a quantitative recruit-to-view test of the three pilots that were competing for the PBS contract, and (c) a consultative process with the producers of those science pilots designed to ensure that their questions and interests were addressed in the research and to provide them with consumer insight that they could apply in their work as science producers. Preliminary results from the research have been shared with the science pilot team at PBS, and at various gatherings of PTV professionals; a final video presentation of the learning will be released by CPB later this Spring. (The quantitative component of this process was designed and fielded by KN/SRI. The qualitative component and the consultative process around the research were designed and implemented by CSA.)

<sup>9</sup> *Washington Week* was the first of the ongoing series to commission a comprehensive program of primary audience research directly in response to the Strategic Framework. This research consisted of viewer in-depth interviews in Tampa and Philadelphia, focus groups in Minneapolis-St. Paul and San Diego, and a quantitative survey among TV viewers either familiar with or currently viewing *Washington Week*. A collaborative process, which has included the moderator and managing editor of the show Gwen Ifill, the show's production team, and department heads from the producing station WETA, will yield a concrete and specific plan to rejuvenate the icon series in conjunction with its 40th birthday. Details of this research are available from WETA.

<sup>10</sup> The *NOVA* strategic initiative is designed to build viewership and maintain the prestige of the series through high-quality event programming, increased web presence and by reinforcing the relationship between the *NOVA* series and local public television stations. *NATURE* seeks to strengthen and distinguish the series brand on air as well as on the web, extend the series into the community through educational outreach, and reinforce the relationship between the series and local public television stations.

<sup>11</sup> *American Experience* applied to the NPS Strategic Growth Fund for resources to support this initiative prior to the drafting of the 2007 Framework, but its efforts will be integral to Priority 3 which focuses on strengthening the performance of the NPS in the historical documentary genre. See page 6.

<sup>12</sup> More and more viewers are finding their way to programs through interactive program guides [IPGs] rather than traditional channel surfing. With that in mind, in Fall 2006, CPB commissioned a quantitative survey of primetime viewers nationwide in order to obtain a better understanding of the methods that they use to find the programs they watch, with a special focus on the role that IPGs, digital video recording devices (DVR or TiVo), and video-on-demand play in viewer navigation. This is to be complemented by a business process audit to trace the typical path of program information from the production unit to the viewer's set, taking account of the various gatekeepers and diverse electronic interfaces that make up this complicated system. Beginning later this Spring, the results of both the primary research and the process audit will be shared with a working group who will be responsible for drafting a set of Best Practices to be implemented at both the local and national level. The ultimate goal is to increase the likelihood that viewers will be able to find on PBS the kinds of programming they like, through electronic program titling and descriptions that are more clear, current, consistent, and appealing.

<sup>13</sup> This Summer, PBS will launch a qualitative research initiative designed to find out how various audience groupings are affected by the use of virtual pledge breaks. Priority Five of this Framework calls for a collaboration between PBS and CPB to integrate what has been learned about the public television audience segments in the CPB-funded strategic research with data about PTV members that is typically maintained in station databases. See page 8.

<sup>14</sup> As of the 2006 AAU study, 14% of adult primetime viewers resided in broadcast-only households. However, nearly 80% of the heaviest PTV-viewing audience segment (the Measured & Engaged, making up 8% of the adult primetime audience) reside in broadcast-only households, and few of these have any plans to switch to cable or satellite within the next year.

<sup>15</sup> Ultimately, efforts to maximize accessibility will also have to address the opportunities and challenges associated with multiple platforms, multicasting, and high-definition television. As viewer behaviors relative to these new technologies evolve and a clearer picture of audience attitudes toward them begins to emerge from ongoing research, it will become possible for strategists to address these issues more specifically in future editions of the Strategic Framework.

<sup>16</sup> Since Spring 2005, CPB has participated on an annual basis in the KN/SRI Home Technology Monitor, one of the longest-running and most-trusted surveys of technology ownership and usage in the United States. In Spring 2006,

CPB also participated in KN/SRI's How People Use Mobile Video study. Together with what it has learned from the biennial AAU study—which includes a full battery of technology-related questions—and from its more recent Viewer Navigation Study (see Note 11), CPB has made a commitment to gathering and disseminating throughout the PTV community current, reliable, and accurate data on the rapidly changing technology landscape.

<sup>17</sup>The Icon Series Campaign focused on three nights and six titles (*NATURE*, *Masterpiece Theatre*, *Antiques Roadshow*, *American Experience*, *NOVA*, and *Frontline*) under the rubric: Save your Sundays! (Mondays!, Tuesdays!). Although other factors may also be at work, the combined ratings average for the titles promoted was up 15% over the same period the previous year, and the primetime average overall was up 13%. In several cases, encore presentations of past titles outperformed their original broadcast by significant margins. An *Antiques Roadshow* from Bismark had a 3.8 rating on November 13, 2006 as compared with a 3.0 on its original broadcast date in April of the same year. An episode of *NATURE* entitled “Violent Hawaii” scored 3.1 on October 29, 2006 as compared with the 2.6 it earned in January 2005. In addition, several of the series websites reported corresponding increases in site traffic, an average of 22% in the number of unique visitors from November '05 to November '06. The first phase of the Icon Series Campaign ran for six weeks, supported by \$5.5 million of paid media including national print, online, spot cable, and spot broadcast. Subsequent three-week phases were budgeted at \$2 million each. Additional information and supporting data on the initiative are available from PBS Brand Strategy and Promotion.

<sup>18</sup> In the 2006 AAU Study, “documentaries about historical places and events” ranked highest for two of the three core audience segments (Enthusiastic & Open, Measured & Engaged) in terms of overall usage. Measured & Engaged in particular express nearly as strong an appetite for more historical documentaries and biographical programs on PBS as they and the Innovating & Inclined have expressed for additional science programming. And in that same study, viewers appear to distinguish “biographical programs” and “documentaries about historical events and places” sharply from “documentaries about contemporary issues or social trends.” This latter genre has the lowest self-reported usage of any of the eight genres in which the NPS offers programming.

<sup>19</sup> In the Spring 2006 AAU, *American Experience*, ranked among the top six PTV titles for past-month viewing for three out of four strategically relevant segments. However, it ranked closer to the bottom among viewers among the history-interested and heavy-primetime-using Enthusiastic & Open. It was named as a favorite (unaided) by less than 4% of any core audience segment. And, for known members, only *NOW* and *American Masters* had lower past month viewing and title awareness levels.

<sup>20</sup>In the Summer 2005 qualitative consumer insight research on history programming, of 17 different clips shown, ones from programs on the building of the Hoover Dam, Emmett Till, Auschwitz, and Jack Johnson consistently generated the highest levels of interest. By contrast, selections from *Colonial House* and *History Detectives* consistently generated the least interest. Respondents did not reject them outright, but they did not see them as satisfactory for meeting their appetite for documentary programming about historical events and places. And *Antiques Roadshow*, while beloved by many, was not normally categorized by viewers as “history programming.”

<sup>21</sup>In the 2006 AAU, Enthusiastic & Open and Measured & Engaged report using nature programming 50-100 percent more than the average primetime viewer. Enthusiastic & Open viewers, in particular, express as great an appetite for more nature programming on PBS as Measured & Engaged and Innovating & Inclined have expressed for science programming. The series *NATURE* ranks in the top three titles for past month viewing (on a combined aided and unaided basis) in six of eight audience segments and in all four strategically relevant segments. Moreover, it ranks first for past month viewing among the member rich Discerning & Dedicated and the heavy-primetime-using Enthusiastic & Open. *NATURE* also surfaces as a favorite PTV show (on an unaided basis) in four of eight segments. Among the Enthusiastic & Open, only *Antiques Roadshow* and *NOVA* are named a favorite more frequently. In the 2006 AAU Study, viewers clearly distinguish science programming from nature programming—both generically and by program title. Self-reported usage of and appetite for each genre differs markedly by audience segment, with Innovating & Inclined leaning heavily in the direction of science and watching nature shows infrequently, while Enthusiastic & Open express a very strong appetite for more nature programs on PBS and a much weaker appetite for additional science programming.

<sup>22</sup>In December 2006, a series of 33 hour-long, in-depth interviews were conducted in Boston, Charlotte, Houston, Des Moines, and San Francisco with Innovating & Inclined television viewers as part of the larger curriculum of research designed to inform the selection and development of a new science series. (See Note 8 above.) The research added depth to the profile of this audience segment that had emerged from previous quantitative research. For example, the research revealed that these viewers reside in child-centric households with a strong orientation toward

social responsibility. And, while it had been known prior to the December study that these were households rich in TV technology, what became clear in the qualitative follow-up was that these are not necessarily “early-adopters,” but technologically-savvy consumers who are cost-conscious and price-sensitive when it comes to obtaining new technologies.

<sup>23</sup> The Innovating & Inclined were originally identified in the 2004 AAU study as a prime target of opportunity because of their strongly positive attitudes toward public television and their expressed desire to watch more public television in the future. In the 2006 AAU, where they made up 13% of all primetime viewing adults, they continued to show an appetite for more PBS, with 44% saying they’d “like to be spending more time watching PBS during primetime”—more than any other audience segment. Because their current viewing and membership levels are moderate, relative to the other PTV-inclined audience segments, there is plenty of room for increased viewing frequency and financial support in this segment.

<sup>24</sup> Among eight audience segments, the PTV-inclined Enthusiastic & Open are second only to the Conventional & Unconcerned in their overall primetime viewing, at 12+ hours per week. Enthusiastic & Open report the highest levels of identification with five of seven possible reasons for watching television—more by far than any other audience segment. (The seven possible reasons, or viewing gratifications, offered were: to find an engaging story that holds your attention, to see a touching story that will move you, to learn something new, to make you laugh, to see an outstanding performance by a great artist or entertainer, to take your mind off everything, to keep up with the programs your colleagues and friends are talking about.) Among DVR owners, only Innovating & Inclined and Conventional & Unconcerned are more likely to record any programs on a typical night. And Enthusiastic & Open are more likely than any other viewer to record multiple programs on a typical evening. In all eight genres in which the NPS offers programming, the Enthusiastic & Open show significantly higher levels of self-reported primetime PTV usage than the average adult viewer; in four of eight genres, they show higher levels of usage than any other audience segment.

<sup>25</sup> Although all three core PTV segments (Discerning & Dedicated, Measured & Engaged, Enthusiastic & Open) show some increase in time spent viewing cable from '04 to '06, only viewers in the Enthusiastic & Open segment show a corresponding drop in time spent watching PBS during primetime. With the exception of *Frontline*, *NewsHour*, and *Washington Week*, self-reported past-month viewing of every PTV primetime series has dropped for this segment since 2006. Enthusiastic & Open is also the only one of the three core segments not to show any meaningful increase in self-reported PTV station membership since 2004. And, among these same viewers, the rank of PBS among channels turned to first dropped from fifth to seventh since 2004, with Discovery and History more likely to be named as a first choice than PBS. Among all segments, they show the steepest decline in percentage of those agreeing strongly that PTV programming is unique (from 52% to 34%) or uniquely engaging (from 38% to 31%).

<sup>26</sup> Based on the 2006 AAU Study, the Enthusiastic & Open are the most likely of the strategically relevant audience segments to rely on flipping and surfing to find primetime PBS programs. And flippers and surfers are five times more likely than users of any other navigation method to have difficulty getting to the PBS shows they want.

<sup>27</sup> Enthusiastic & Open viewers express as great an appetite for more nature programming on PBS as Measured & Engaged and Innovating & Inclined have expressed for science programming. In addition, the series *NATURE* ranks first for past month viewing among the Enthusiastic & Open, who name it their favorite PTV program more frequently than any other ongoing series except *Antiques Roadshow* and *NOVA*. Their usage of and appetite for more historical documentaries and biographical programs is also relatively high. Only the Measured & Engaged show more interest in history than the Enthusiastic & Open do.

<sup>28</sup> Although they watch nearly as much public television (on a self-reported basis) as the member-rich Discerning & Dedicated, only 6% of the Enthusiastic & Open report current membership in their local PBS station (vs. 45% for the Discerning & Dedicated). If only a modest percentage of these avid PTV viewers were converted to members, the outcome could be remarkable for local stations.

<sup>29</sup> Much of the data informing the Strategic Framework has come from two major national surveys of television awareness, attitudes, and usage funded by CPB—one in 2004 and one in 2006. (See Note 5.) This has, in effect, become a biennial study, with the next version of it to be conducted in January and February of 2008. By continuing to track viewer behavior over time, as well as the size and attributes of the public television audience segments, it will be possible to measure the impact of strategic activities underway and fine-tune the strategic direction into the future.

<sup>30</sup>Since 2004, there have also been two ad hoc qualitative studies funded by CPB in connection with program strategy: the research into viewer attitudes toward history and performance programming (conducted in Summer 2005 by CSA) and the research to inform the development of a new science series (conducted Q4 2006 and Q1 2007 also by CSA). These studies have not only provided answers to specific research questions but have aided in the design of subsequent quantitative studies. The profile of Enthusiastic & Open and viewer behavior and attitudes relative to pledge are among the areas suitable for future qualitative research in the near future.

<sup>31</sup>As noted in Note 14 above, CPB has participated for two years running in KN/SRI's Home Technology Monitor. This has yielded a wealth of information on everything from the penetration of DVRs and HD sets to the amount of time viewers spend online while watching television. The system has expressed a strong desire for a steady stream of the most reliable and up-to-date information on these technological issues well into the future. The use of mobile video and other new media platforms for consuming PTV content also suggest themselves as a focus for ongoing measurement.

<sup>32</sup>See Notes on the Process for a detailed description of the history and structure of the process.

<sup>33</sup>See Priority 2 on page 10 for the relationship of this topic to the challenge of improving the accessibility of PTV programming.

<sup>34</sup> It is anticipated that this PTV Research Advisory Board would include a full range of disciplines—e.g., general managers, programmers, local station researchers, producers, and representatives from the relevant national organizations. (These would not be the same individuals who participate in the annual Strategic Framework process, the goals of which are distinct from that of the envisioned Advisory Board.) The Board would also draw on the expertise of marketing and media professionals from outside of the public television community in order to benefit from a deeper knowledge of the best practices in use in the industry at large.

<sup>35</sup>Performance indicators would include, though not be limited to: audience rating trends, the tracking of strategic audience segments over time, self-reported viewing (aided+unaided) of ongoing series titles in the biannual AAU, as well as the outcomes of evaluation modules specific to Opportunity Fund initiatives.

### Notes on the Process

**The Context.** In the Fall of 2002, the Corporation for Public Broadcasting [CPB] launched an effort to stabilize public television and plan for its future. As a consequence of declining viewership, higher costs, and a shrinking member base, CPB—working with McKinsey and Company and a 14-member steering committee comprised of key stakeholders throughout the public broadcasting system—directed a system-wide analysis designed to determine the scope and scale of the current pressures on the system and to identify the most promising opportunities for improvement and lasting change.

It was in the context of this larger effort that an initiative focusing on the National Program Service [NPS] Strategy was born. While improving the health of the system would entail a number of projects including the development of strong major and planned giving programs at the station level, it was clear that public television’s approach to national programming needed re-examination.

In order to surface concerns and generate ideas, CPB consulted extensively with representatives from 110 stations, the Association of Public Television Stations [APTS], the National Educational Telecommunications Association [NETA], and the staff and management of the Public Broadcasting Service [PBS]. It was this process that led to the launch of the major research effort which was designed to inform the NPS primetime strategy.

**The Research.** The research plan was developed with extensive input from PBS, the local station community, and recognized authorities in audience research and media measurement. CPB conducted an open search for premier research suppliers with three attributes: authoritative expertise in audience research, skill at state-of-the-art research methods, and alignment with the mission and ethos of public broadcasting. The result was a three-phase, nine-month research plan, beginning in Fall 2003 and ending the following Spring. The research yielded three important outcomes that have determined the basic contours and dimensions of this Framework.

- A set of core principles – These represent the basic perspective of the viewer on public television: how they define it, why they value it, what it needs to be in order for them to use and support it.
- A comprehensive set of data about audience awareness, attitudes, and usage – Covering a wide range of issues, from home technology to network preferences, these data help the strategist to understand the dynamics driving the viewing—and the non-viewing—of public television in primetime.
- A state-of-the-art audience segmentation – Utilizing the same data set referenced above, statistical analysis yielded a comprehensive map of the national adult primetime viewing audience, providing for the first time ever deep insight into who specifically is and is not watching public television and why, and serving to identify both the greatest opportunities for improvement and the possible strategic directions that would effect positive change.

The research on which the Strategic Framework is based is not the first or only audience research to be conducted in the public television system. Local stations, program producers, PBS, and CPB have all sponsored and continue to sponsor valuable learning initiatives. Moreover, what was learned in the NPS Research cannot be taken apart from what local stations know from their own members’ feedback and from the data purchased from Nielsen Media Research. Still, as a foundation for a strategic framework, the NPS Research has pride of place—by virtue of its

methodological integrity, its comprehensiveness, and the fact that it is the only research commissioned to date designed specifically to address the strategic question.

**The Development of the First Framework.** As the original research plan was being completed, CPB devised a process for transforming the research findings into a strategic framework. Although the learning from the NPS research has been shared widely throughout the public television system, three bodies in particular participated in the development of the strategy: An NPS Strategy Group consisting of the heads of programming from PBS, CPB, WNET, WGBH, and a station representative; a Station Advisory group consisting of general managers and programmers; and the station community at large represented by the more than 100 general managers who took part in CPB's October 2004 Round Robins.

During the collaborative process leading up to the presentation of the first (2005) edition of the Strategic Framework, dozens of ideas were generated in structured discussions conducted on the basis of the research findings. Some of these ideas were clearly more tactical in nature and, while they may have implied a strategic perspective, they were not themselves or strictly speaking strategic and were simply recorded for later reference. Other ideas, while interesting and provocative, were either contradicted by the data and/or found such little resonance in the wider stakeholder group, that they too were noted, but not highlighted for subsequent incorporation into the Framework. What remained was a somewhat smaller set of strategic considerations which formed the basis for the Framework itself.

To rise to the level of a “strategic consideration,” an idea had to be supported by the data, and its relevance to the strategic objectives needed to be recognized by a critical mass of stakeholders participating in the consultative process. This means, of course, that individuals in the process may not see their particular idea represented in the framework or they may see the influence of ideas which they themselves rejected. Nonetheless, the overall level of support that the remaining considerations found in the Station Community, the Station Advisory Group, and the Strategy Group is such as to give us a high level of confidence in the framework that emerged from the process.

The first edition of the Framework was published in April 2005. In light of the new learning that came from the Spring 2005 history and performance research and the initial experience of implementing the initiative, it was determined that the Framework be refined and updated. These refinements were reflected in the 2006 edition that emerged from extensive discussions during the fourth quarter of 2005 and first quarter of 2006 among the same stakeholders who developed the original version.

**The Origins of the 2007 Edition.** No sooner had these consultative groups completed the 2006 edition, they began working on the present edition, contributing feedback to the process whereby the questionnaire for the 2006 AAU study was developed. Once the findings from that study became available, these groups participated in a series of on-site meetings in Washington, DC and conference calls during which they reviewed findings, identified zones of potentially impactful strategic activity, and established the strategic priorities outlined in the 2007 edition of the Framework.

Major meetings of these two groups took place on May 9, June 23, September 12, and October 10 of 2006 and February 9 of 2007. Feedback on the research and the emerging strategic implications was obtained in a series of workshops and meetings with programmers, general managers, producers, and other PTV professions including the following: the PBS Development

Conference (October 4, 2006, Baltimore), the combined PBS-CPB Round Robin Meetings (October-November 2006), the Public Television Programmers' Association Meeting (November 8, 2006, Amelia Island), the PBS Content Summit (January 16, 2007, San Francisco), and the National Educational Telecommunications Association Conference (January 27, 2007, Norfolk). A first draft of the 2007 Framework was distributed to members of the Station Advisory Group and Strategy Group for review and comment on March 9, 2007. A second draft, revised on the basis of the feedback gathered from those two groups, was distributed to Affinity Group Coalition members for review on April 11, 2007. The final draft reflects their input.

Although the new edition reflects some realignment of priorities as a result of recent learning and developments, the main focus and direction of the original strategy remains unchanged: to increase the reach of public television, the frequency with which its programming is viewed, and the loyalty of those watching.

For more information, go to:  
[www.cpb.org/stations/npsresearch](http://www.cpb.org/stations/npsresearch)

Or contact Terry Bryant:  
[tbryant@cpb.org](mailto:tbryant@cpb.org)  
(202) 897-9830