

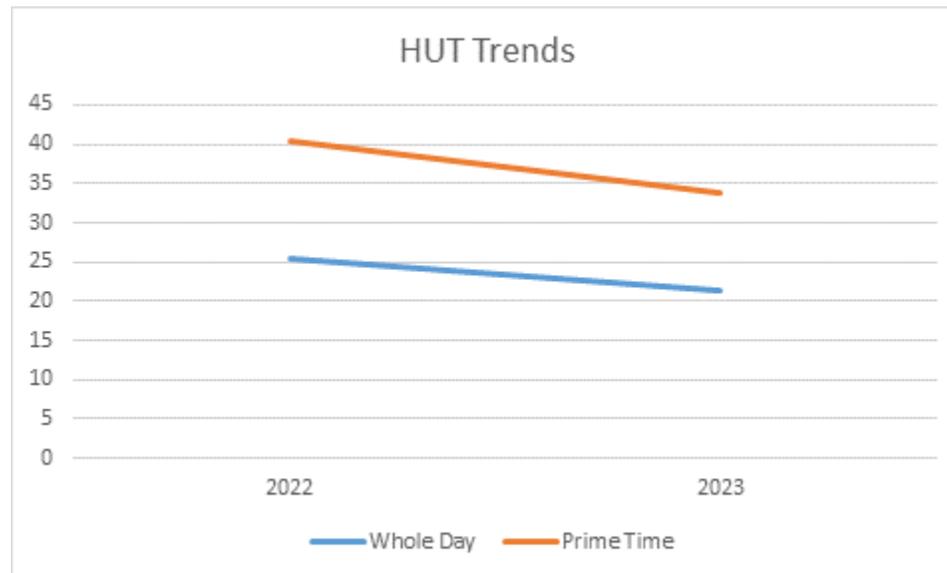
PLEDGE POSTCARD

March 2023, vol. 1

The information contained in this email is intended for use only by clients of The Programming Service.

IS THERE A PULSE?

The question we are getting from many of you is, “Is anybody still out there?” With very few exceptions, as expected, dollars are down and so are broadcast audiences. **HUTs (Households Using Television) are down again (minus more than 15% for both)**, as you can see from the chart below. Fewer homes are tuning in and they are watching less. The first few days of pledge saw **Prime Time Gross Rating Points off 6.5% and Whole Day down 15.54%**. Looking at the weekend daytime totals, it makes sense that we are down more than 20% in those dayparts that usually do so well.



One bright spot may be weekday mid-afternoons where our “prime time on your time” blocks are running – GRPS are up slightly and it is an added location for member support.



STICK OUT YOUR TONGUE AND SAY “AAAH!”

We cannot do a full check-up on the audience without looking at where we are on our non-linear platforms. One trend we are seeing is the older, loyal audience moving from your broadcast schedule to Passport as soon as pledge starts – quite the opposite from broadcast – there are more people giving and streaming in the first few days of the drive nationally.

Total Passport Streams

1.5 Million

+58% from 2022

Total Become a Member Clicks

38,600

+18.6% from 2022

Total Users

321,100

+37.7% from 2022

In fact, the only streaming decline is the General (FVOD) total, which is down 8.5% from last year at the same time. Knowing the synergy between a linear broadcast and a potential stream, it makes sense that we would shed the casual user first. During the drive thus far, the top five Passport titles are *All Creatures*, *Call the Midwife*, *Vienna Blood*, *Miss Scarlet* and *Seaside Hotel*—based on what we know about this audience, that is a lot of older, female viewers potentially lifted out of linear, which could definitely impact on-air success. When we throw in the FVOD, *All Creatures*, *PBS NewsHour*, *NOVA*, *Livestream* and *Call the Midwife* make up the top five – none of which should be impacting on-air pledge significantly.

As we discuss the impact of sustainers, the increase in streaming and losses in our broadcast audiences, remember the importance of a healthy body. As we have mentioned many times, we have to adjust our expectations and keep in mind the overall value of all our fundraising efforts.

YOUR PERSONAL TREATMENT PLAN

One of the benefits of starting March pledge in February is delivering powerful Black History Month content worthy of support during a time of increased interest and promotional opportunities. Would a regular Broadway program get featured on *The Today Show*? *Black Broadway: A Proud History, A Limitless Future* had a wonderful feature because it was on point with the program’s Black History Month celebration. We hope everyone built on the synergy around BHM, the online Block Party and all the DEI content in February to build success for these efforts.

Like the rest of the drive, we have seen varied results for *The Magic of Spirituals*, *African Americans: Many Rivers* and *Black Broadway*, but for many, the results have been solid. *Black Broadway* was the #1 show with the requested common carriage – which helped *The Today Show* gig, too!