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# Brand Safety

## Consumer Attitudes and Actions by Age Demographic



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## EXECUTIVE SUMMARY

Brand safety has been a growing concern for marketers for some time, led by digital marketers who found their brands in unfavorable environments as a result of programmatic buys. But now the same challenges are faced by television buyers, who must develop strategies to avoid association with content that runs counter to their brand's image or messaging.

Linear TV has traditionally been considered a safer environment when compared to the digital advertising world. It is an easier medium to monitor, and has typically been absent of immediate commentary from the audience. This relatively safe haven for brands, however, is increasingly becoming a thing of the past.

In the current highly-charged environment, with heightened sensitivities on a broad range of issues, viewers are reacting to content they find objectionable, and are now willing to hold both media platforms and the advertisers who support those platforms responsible. And, they are making their voices heard.

While this behavior is evident across all demographic age segments, our research identified some clear differences on attitudes and actions by age. While older demographics take offense to content at a higher rate, Gen-Z and Millennial consumers, 18-34 year olds who grew up with the internet, are the most willing to act on their convictions. As online and offline lives continue to blur, advertising activism will continue to thrive, and finding a brand safe environment will be more and more of a concern for media buyers of linear television.

### Our Research Study

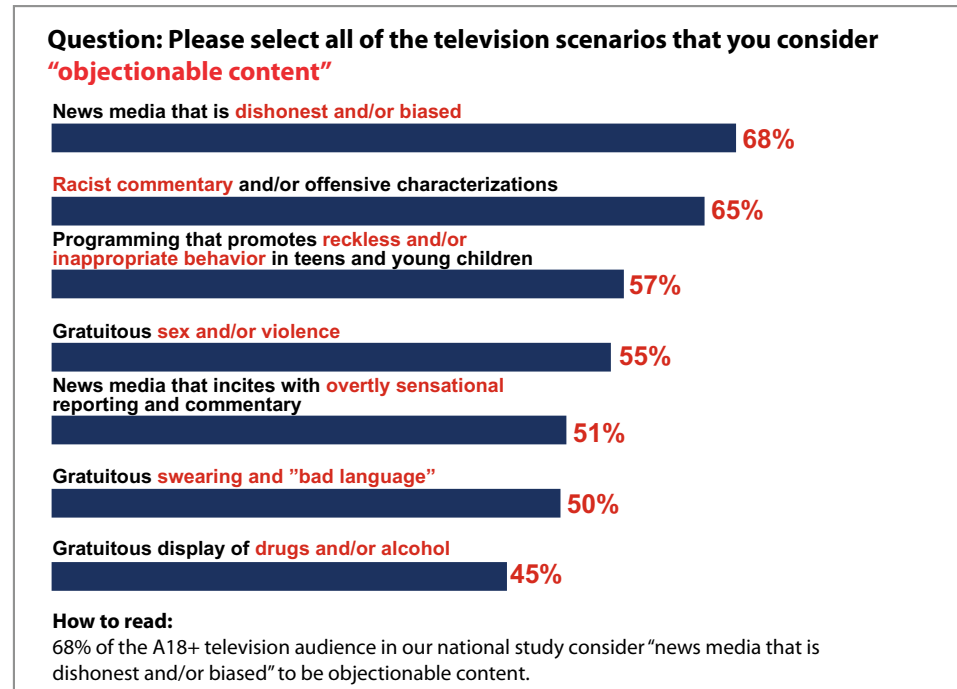
To understand the attitudes and behaviors of the national television audience, the Sponsorship Group for Public Television partnered with Lightspeed Research to field a comprehensive study to gain insight into attitudes and behavior as they pertain to television viewing. Please see Appendix for more information.



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## Content Identified As Objectionable

Viewers identified a broad range of content as “objectionable,” defined as any television programming the viewer finds unpleasant to the point of being offensive.



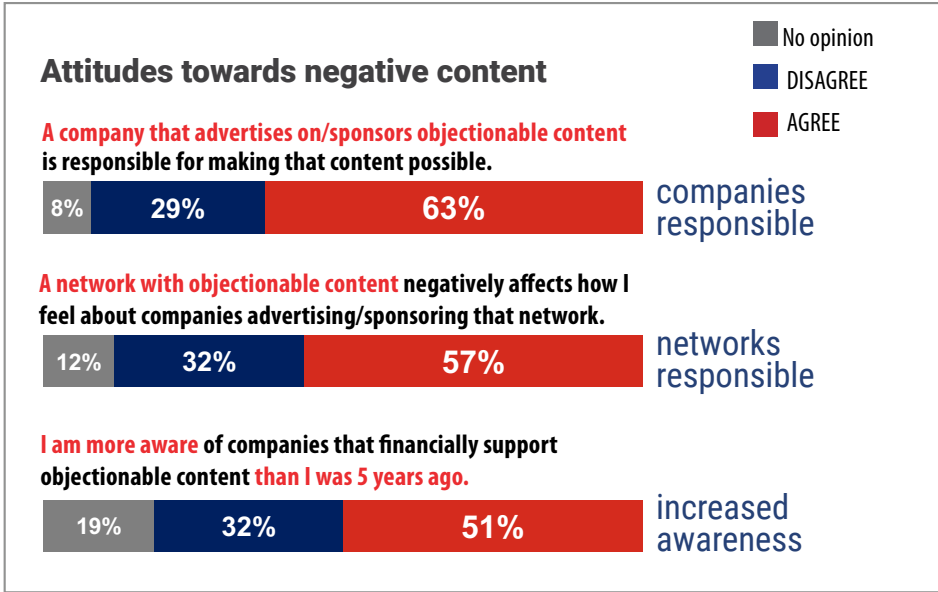
Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

It is not surprising that “news media that is dishonest/biased” is the number one concern for viewers, and for marketers. The polarized political environment, and an unusually high distrust of the news media, has resulted in increased concern among marketers buying television news. Brands have faced backlash from consumers via robust activism campaigns for supporting — what they deem as — objectionable content. Using social media as the main distribution tactic, these campaigns reach millions of like-minded consumers, delivering negative press and threatening nationwide boycotts. This has caused major advertisers to pull spots from some news programs and networks.

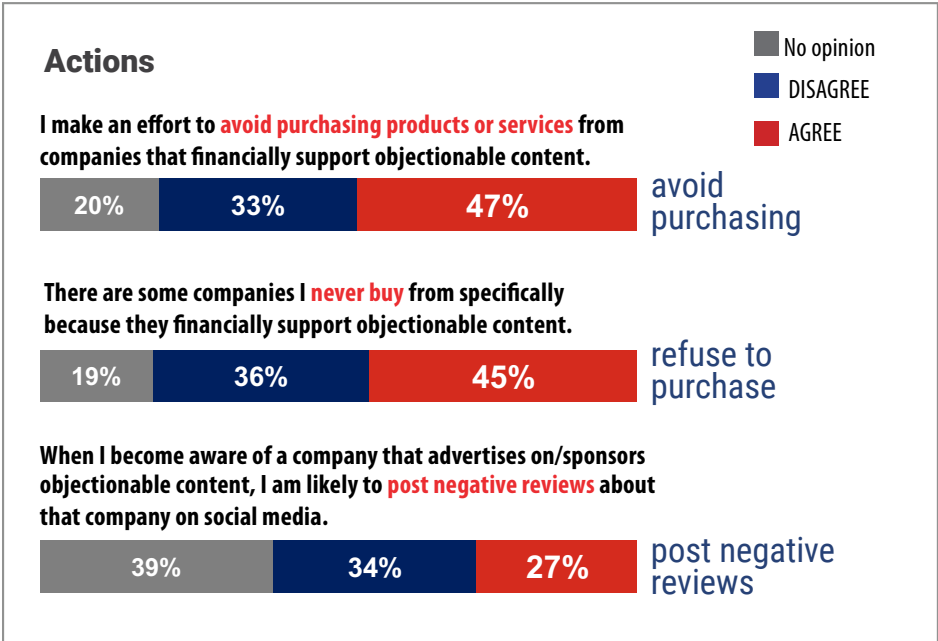
## Consumer Brand Safety Attitudes and Actions

Not only are consumers increasingly aware of brand safety issues, they are prepared to hold the media platform, and the advertisers that support the content, responsible.

68% of adult television viewers consider news media that is dishonest and/or biased to be “objectionable.”



■ ■ ■ ■ ■  
 The majority of respondents agree that brands that advertise on objectionable content are responsible for making that content possible, leading to negative opinions about the company.



Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

The majority of respondents agree that brands that advertise on objectionable content are responsible for making that content possible, leading them to have negative opinions about the company. They are more aware of that relationship now than 5 years ago. Nearly half of the respondents will avoid doing business with these advertisers, and 27% will actively take to social media to voice their opinion.

## Sensitivity to Objectionable Content by Age Segments

When this data is segmented by age, we are able to identify generational differences in the way consumers approach objectionable content, and the likelihood that the consumer will take meaningful action against the advertisers that support objectionable content.

The data was analyzed by three core groups: Adults 18–34, Adult 35–54, Adults 55+.

Question: Please select all of the television scenarios that you consider “objectionable content”	A18-34	A35-54	A55+
News media that is <b>dishonest and/or biased</b>	56%	59%	79%
<b>Racist commentary</b> and/or offensive characterizations	55%	58%	73%
Programming that promotes <b>reckless and/or inappropriate behavior</b> in teens and young children	42%	51%	67%
Gratuitous <b>sex and/or violence</b>	42%	52%	64%
News media that incites with overtly <b>sensational reporting and commentary</b>	38%	43%	62%
Gratuitous swearing and <b>“bad language”</b>	36%	45%	60%
Gratuitous displays of <b>drugs and/or alcohol</b>	34%	42%	52%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

All age segments identified content as objectionable, although the A18–34 segment was less likely to be offended than the A55+ demo. The A18–34 demo was offended by bad language and displays of drugs/ alcohol at the lowest rate, which may be reflective of this internet-raised generation. The A55+ demo was most offended by dishonest news and racist/offensive characterizations, a reflection of a demographic for whom this current more free-wheeling environment is a departure from what they have known in the past.



The A55+ segment is the most sensitive to objectionable content.

## Making a Connection Between Objectionable Content and the Advertiser by Age Segment

Unlike our analysis on consumer sensitivity to objectionable content, these results did not show any obvious differences between age. The connection of advertiser to content was strong across all age groups.

I agree that...	A18-34	A35-54	A55+
A company that advertises on/sponsors objectionable content is <b>responsible</b> for making that content possible.	65%	58%	65%
A television network with objectionable content <b>negatively affects how I feel</b> about the companies advertising on/sponsoring that network.	60%	55%	57%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018



All segments connect advertisers to content they find objectionable.

## Taking Action Against the Advertiser by Age Segment

The A18–34 demographic is significantly more likely to have identified companies that they hold responsible for supporting objectionable content, and are willing to take action.

Your attitudes for purchasing	A18-34	A35-54	A55+
There are some companies that I <b>never buy</b> from specifically because they financially support objectionable content via advertising/sponsorship.	54%	45%	41%
I make an effort to <b>avoid purchasing products</b> or services from companies that financially support objectionable content through advertising.	55%	46%	44%
Objectionable content has no bearing on <b>where I spend my money</b> .	39%	52%	55%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

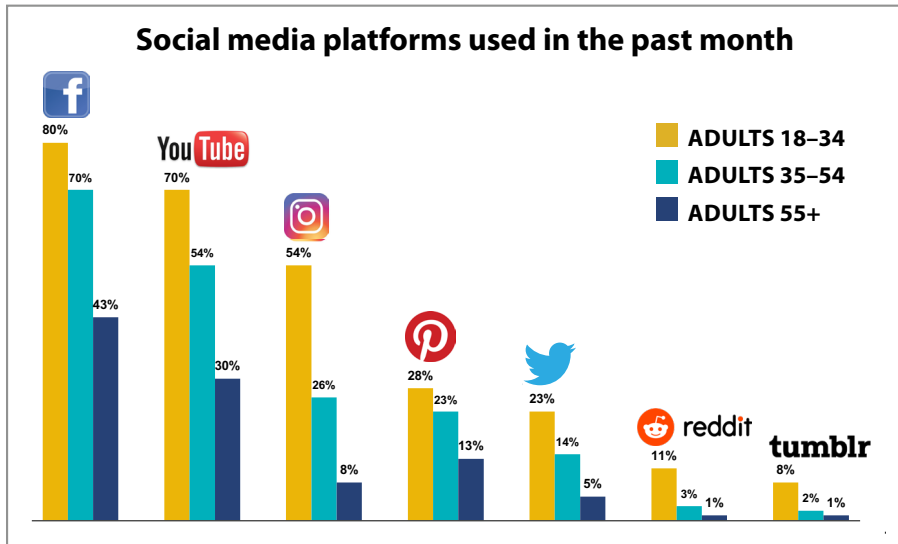


The A18–34 segment is more likely to refuse to do business with a company because of support of objectionable content.

## Social Media and Advertising Activism

Social media is the most effective tool for activists to hold corporations accountable. Organizations such as Sleeping Giants exist purely for the purpose of persuading companies to remove ads from media platforms, using social media.

While sites such as Facebook, YouTube and Twitter are used by consumers of all ages, the A18–34 segment is still the dominant user of social media.



Source: MRI/GfK 2018, Doublebase

Not only is the A18–34 segment more likely to use social media, young demos are far more likely to be using a second screen while watching TV.

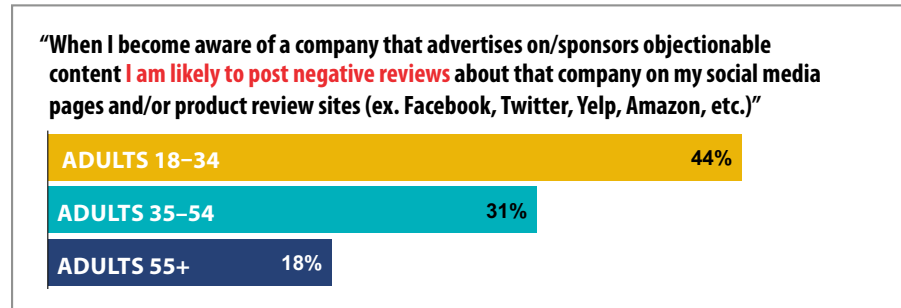
	A18-34	A35-54	A55+
Second screen viewing while watching TV by age segment	84%	76%	41%

Source: eMarketer, October 2018

With a second screen experience, television becomes interactive. In real time, a consumer can spot objectionable content, identify the advertisers, broadcast concern to thousands of online connections, and be instantly connected to consumers across the country who share their discontent — movement started.

Social media drives advertising activism, led by the A18–34 segment.

Given these media habits, it follows that the A18–34 segment is significantly more likely than the A55+ segment to “post negative reviews online about a company that advertises on/sponsors objectionable content.”



Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

44% of A18–34 agreed they are likely to post negative reviews online about companies that advertise on/sponsor objectionable content.

## Finding a Brand Safe Environment

Given the possible repercussions of brand association with objectionable content, marketers are looking for a safe haven.

PBS has long been considered a safe media environment for sponsors, not only because of its content, but because of the unique relationship that viewers have with PBS. We asked our survey respondents a battery of attitude questions to better understand how audiences feel about the programming offered by the stations they watch.



I agree that the station I watch....	PBS	Cable	Broadcast
Has family friendly content	84%	68%	66%
Provides programming that respects my intelligence	83%	63%	56%
Provides content I cannot find anywhere else on television	80%	57%	43%
Sets the standard for quality and excellence that sets it apart from other TV programs/networks	77%	52%	45%
Is thorough and in-depth	74%	61%	51%
Strikes the perfect balance between educational and entertainment programming	74%	52%	43%
Provides information/content that I trust	73%	67%	58%
Addresses important issues	69%	56%	59%
Provides programs that make me smarter	66%	50%	37%
Is objective	58%	47%	43%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

PBS ranks the highest in quality and trust attributes.





The positive associations for PBS for quality, safety and trust far exceed the commercial cable and broadcast networks.

Inversely, respondents were asked to rate the networks they watch on negative qualitative criteria. Again, PBS outperformed all other broadcast and cable networks.

I agree that the station I watch...	PBS	Cable	Broadcast
Has programs that might be <b>inappropriate</b> for some	26%	34%	40%
Provides <b>mindless entertainment</b>	25%	36%	39%
Has <b>too many commercials</b> that interrupt my viewing experience	21%	36%	42%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

## Viewer Appreciation for PBS

The appreciation the PBS audience has for its programming stems from multiple factors.

- **PBS’s emphasis on mission-based, educational programming.**

74% of PBS viewers agree that “PBS strikes the perfect balance between educational and entertainment programming.” The PBS audience is highly educated when compared to the average broadcast or cable television viewer. This emphasis on educational content is a valued resource to the PBS viewer, who is 26% more likely to possess an advanced degree and 44% more likely to have a doctorate degree.\*

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

\*Source: MRI/GfK 2018, Doublebase, includes PBS prime and news programming

- **PBS’s family-friendly programming.** PBS content is structured around the whole family. 84% of the PBS audience agrees that PBS has family friendly content. Furthermore, 94% of parents with children that watch PBS KIDS agree that “PBS KIDS is a trusted and safe place for children to watch television.” Creating content with the whole family in mind helps PBS avoid many of the objectionable content pitfalls that affect other broadcast and cable television networks.

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018



Negative attributes are least associated with PBS.



PBS content connects with viewers because of its mission-based, educational, and brand safe content, and unique viewer membership model.



- **PBS's member-based donation model.** PBS's local station membership model allows for the audience to take partial ownership of programming by donating directly to the station to keep their favorite programs on the air. This connection between the audience and the network is an advantage not shared by any other major broadcast station or the cable platform.

## The PBS Halo Effect

If objectionable content causes viewers to feel negatively about advertisers or sponsors, does exceptional high-quality content lead to viewers feeling positive about the sponsor or advertiser?

For PBS, the answer is yes. Our study showed that 62% of PBS viewers agree that they “feel more positive about companies that sponsor PBS.” This is almost double the next closest network (Fox at 34%).

I feel more positive about companies that advertise on...			
<b>PBS</b>	<b>62%</b>	<b>ABC</b>	20%
<b>FOX</b>	34%	<b>NBC</b>	18%
<b>Cable</b>	33%	<b>CBS</b>	17%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018

Does this positive feeling towards PBS sponsors result in a positive action? Just as objectionable content negatively impacts sales, exceptional content positively impacts purchase preference.

Do you agree?	<b>PBS</b>	Cable	Broadcast
I would consider buying a product or service from a company <b>because they sponsor/advertise on...</b>	<b>50%</b>	29%	23%
All else being equal, I would prefer to <b>purchase</b> a product from a company that sponsor/advertises on...	<b>49%</b>	28%	20%
All else being equal, I would be <b>willing to pay a little more</b> to purchase a product or service from a company that sponsors/advertises on...	<b>35%</b>	19%	15%

Source: Lightspeed Research/SGPTV Viewer Attitudes & Behaviors Study | March 2018


## Contact us

Visit our website [SGPTV.org](http://SGPTV.org) for more information about PBS Corporate Sponsorships. And **contact us** today to connect with a sales representative, call 800.886.9364 or email us at [sgptv@wgbh.org](mailto:sgptv@wgbh.org).

Viewers feel more positive about brands that sponsor PBS.



PBS viewers are 2X more likely to purchase from PBS sponsors, as compared to intent to purchase from advertisers of cable or broadcast.



## RESEARCH METHODOLOGY AND OVERVIEW

This study was designed and implemented by SGPTV in partnership with Lightspeed Media. It is the latest in a series of studies commissioned by SGPTV to understand viewer opinions and attitudes about TV programming content, and advertisers/sponsors that support that content. (2006, 2009, 2013, 2015, 2018)



LIGHTSPEED

### The 2018 study was fielded March 19 – March 29, 2018.

- Respondents screened: Adults 18 years or older, reside in the U.S.
- Viewers of any of the following networks (past 30 days) were invited to take the survey.
  - ABC, CBS, FOX, NBC, CNBC, CNN, Discovery, ESPN, HGTV, History, Lifetime, MSNBC, National Geographic, TBS, TNT, USA
- Total respondents: 5,105
- Nationally representative
- Age cells mirror U.S. population

### LIGHTSPEED

- Leader in digital data collection
- Online research since 1996
- 5 million+ panel members in 45+ countries
- Delivered 30 million completed interviews to 4,000 customers