

# TVB

Local Media  
Marketing Solutions

## Back to School & College Report

2025

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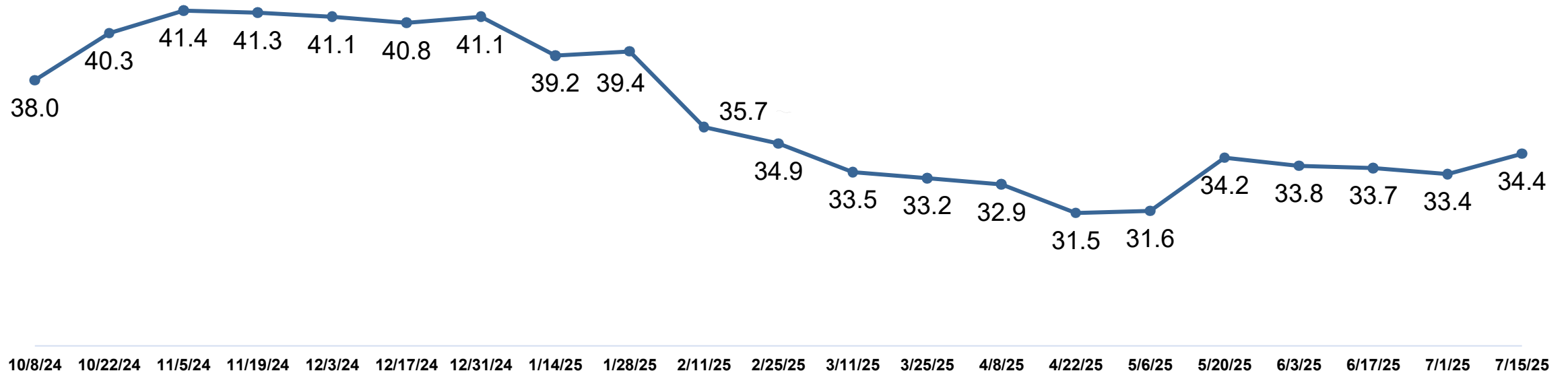
# Back-to-School Season Spending & Attitudes



# Slight Pick Up in Economic Sentiment After Three Consecutive Drops

## Economic Sentiment Index Biweekly %

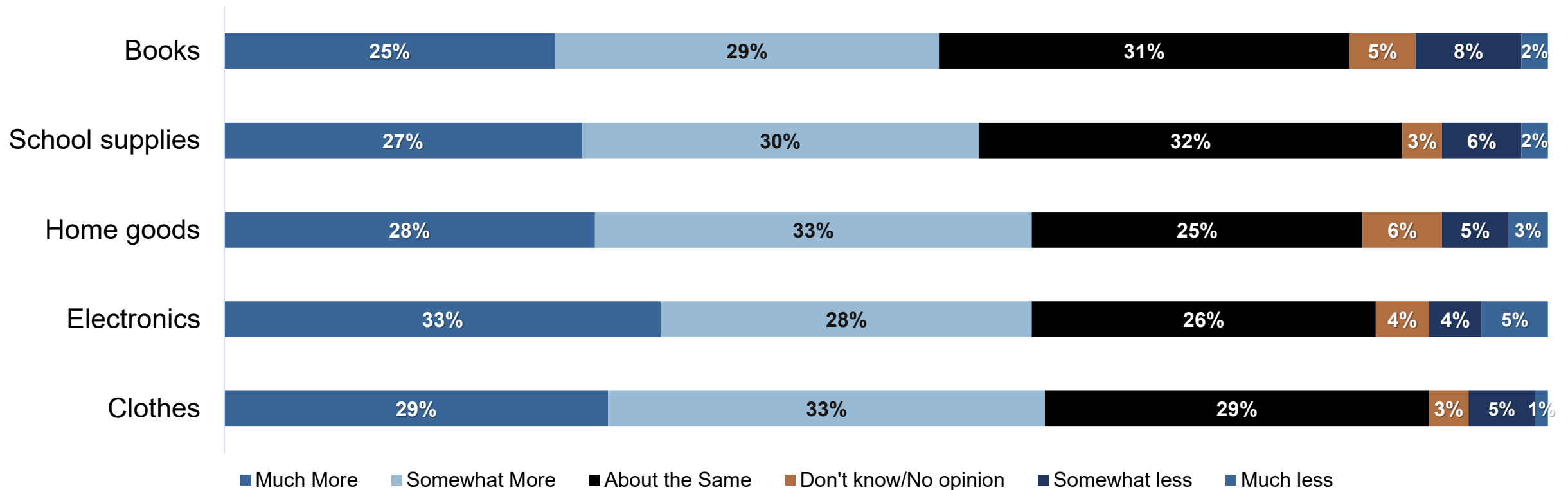
(The ESI is a “living” index that measures U.S. adults’ expectations for the economy going forward, as well as their feelings about current conditions for major purchases)



Source: Penta-CivicScience Economic Sentiment Index (n = 3,000) | Looking ahead six months, do you think the U.S. economy will get better, stay the same, or get worse? Over the next six months, do you think it will become easier or more difficult to find a new job? Over the next six months, do you expect your personal financial situation to get better, stay the same, or get worse? Given the current state of the economy, is now a good time or a bad time to make a major purchase like a new car or home improvements? Given the current state of your local market, is now a good or bad time to purchase a new home?

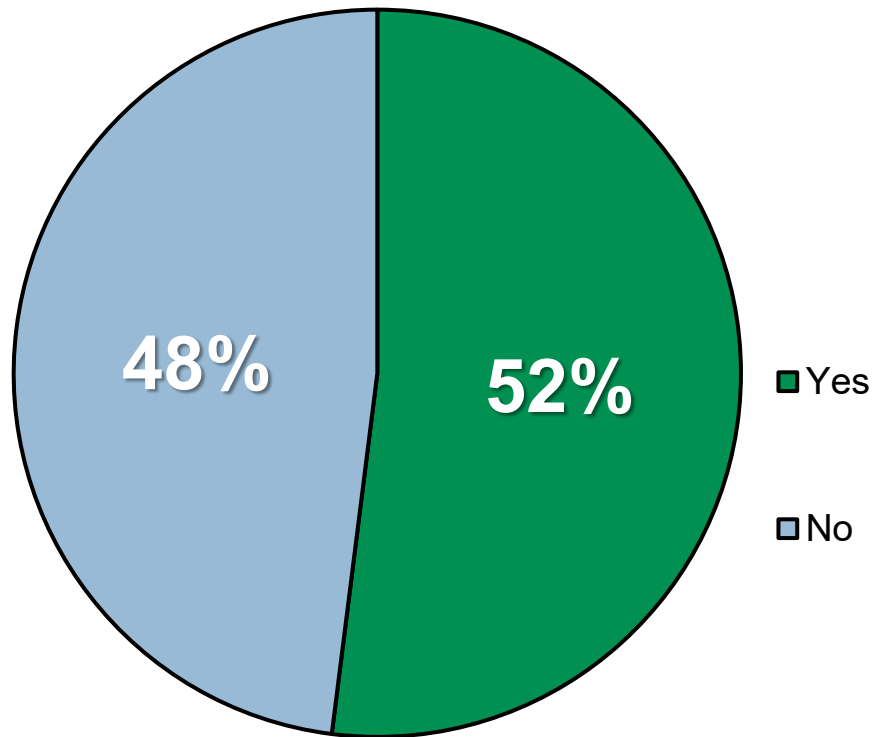
# Back-to-School Shoppers Are Already Noticing Higher Costs

Share of respondents who think the following back-to-school categories cost more or less than last year, based on the shopping they've already done

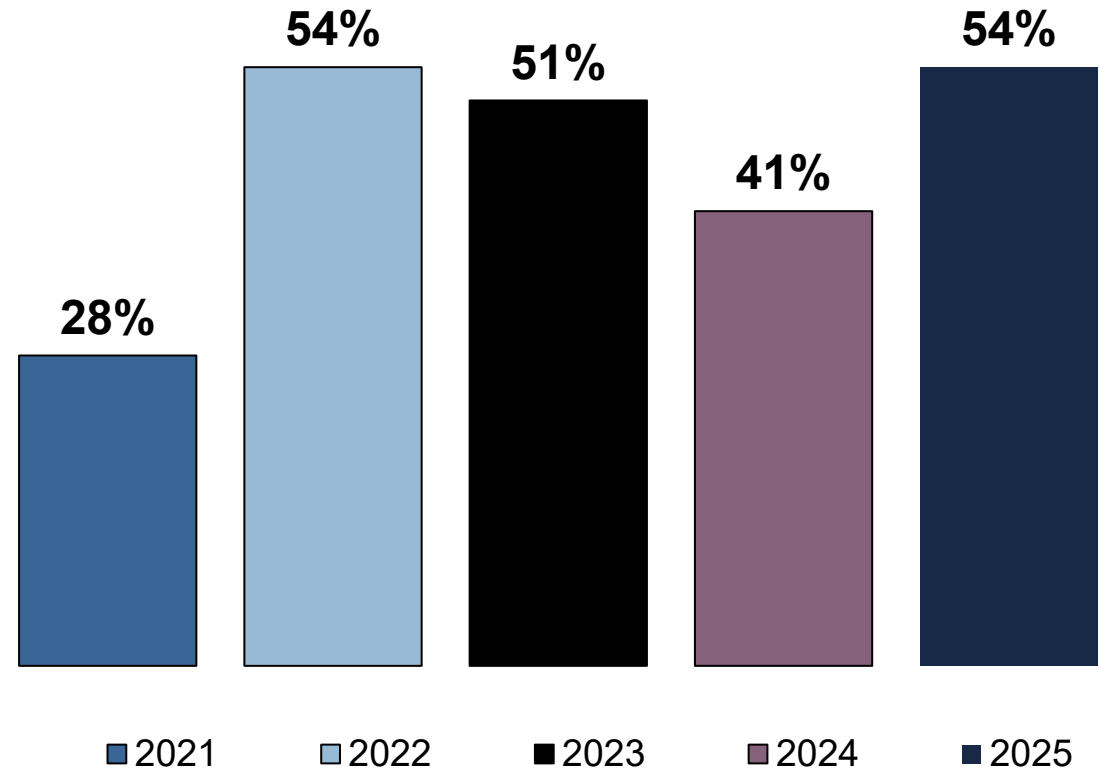


# Back-to-School Shoppers Anxious

**% of Parents Anxious About Potentially Higher Prices on BTS Items**



**% of Parents Who Expect Economy to Weaken in Next 6 Months**



# Despite Low Consumer Sentiment, the NRF Predicts Strong Retail Year



Any way you look at it, a lot is riding on the consumer. While we do expect slower growth, consumer fundamentals remain intact, supported by low unemployment, slower but steady income growth, and solid household finances. Consumer spending is not unraveling... it's the hard data on employment, income and tariff-induced inflation — not consumer sentiment — that supports our view of a slower trajectory for consumer spending.

- NRF Chief Economist Jack Kleinhenz



## 2024

3.6% retail sales growth

Annual sales growth of \$5.29 trillion

8.1% sales growth in non-store and online sales

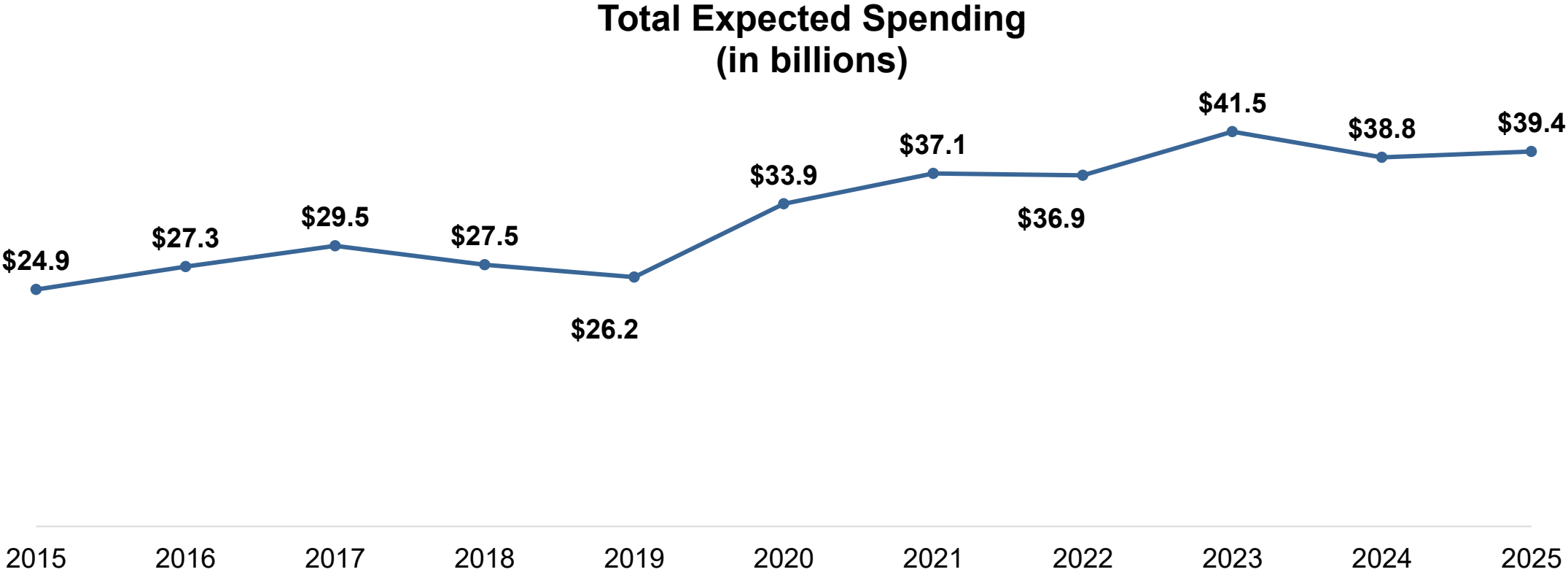
## 2025

2.7% - 3.7% forecasted retail sales growth

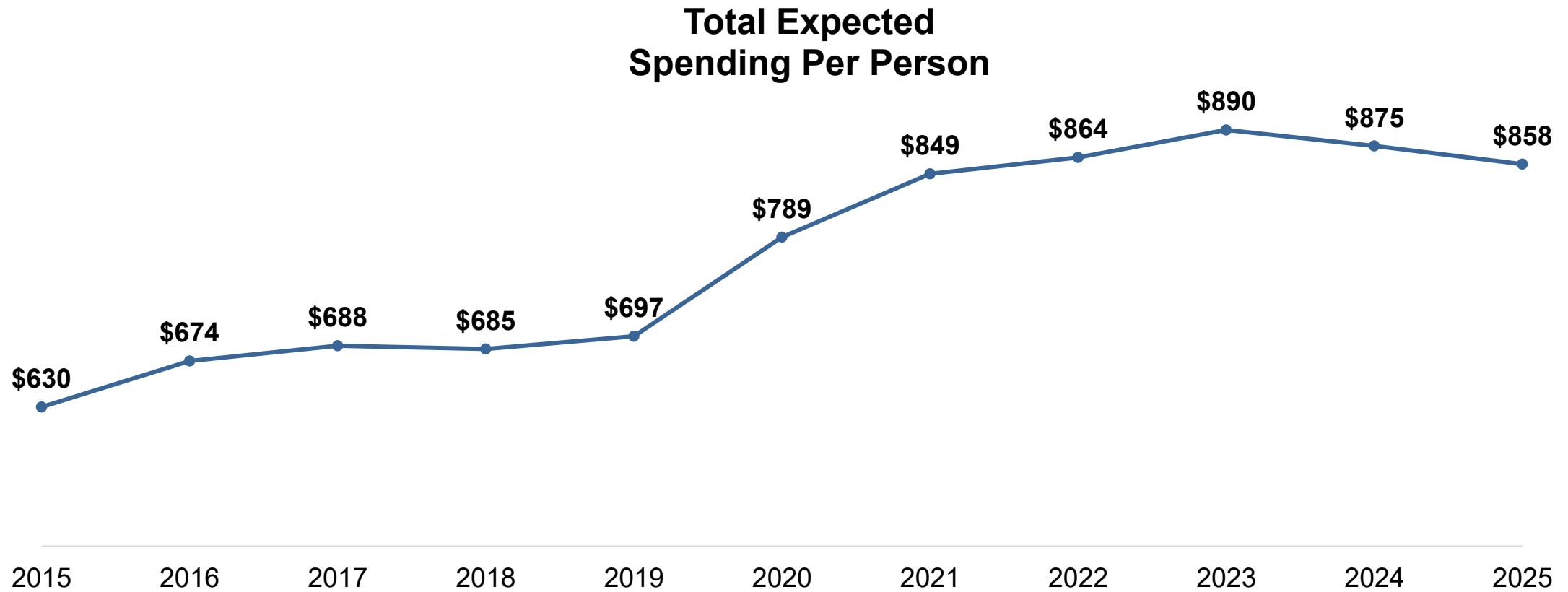
Annual Sales Growth forecasted between \$5.42 trillion and \$5.48 trillion

7%-9% sales growth forecasted in non-store and online sales

# Expected Spending for 2025 Reaches Second Highest Record in Survey's History



# Per Person Spending Set to Reach Third Highest Record in 2025



# Only a Quarter of Back-to-School Shoppers Intend to Spend Less than Last Year

**3/4**

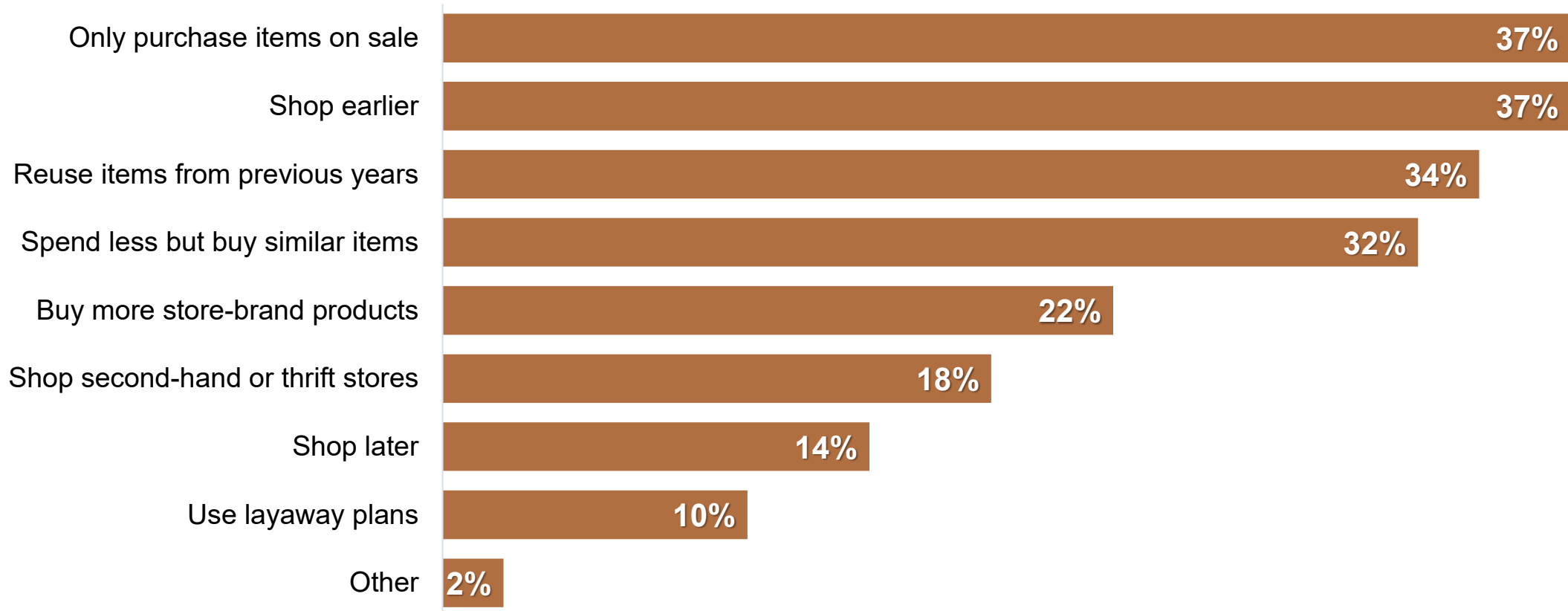
of Back-to-School Shoppers expect to spend the **SAME** or **MORE** this season, compared to 2024.

**1/4**

of Back-to-School Shoppers anticipate to spend **MORE** in comparison to 2024.

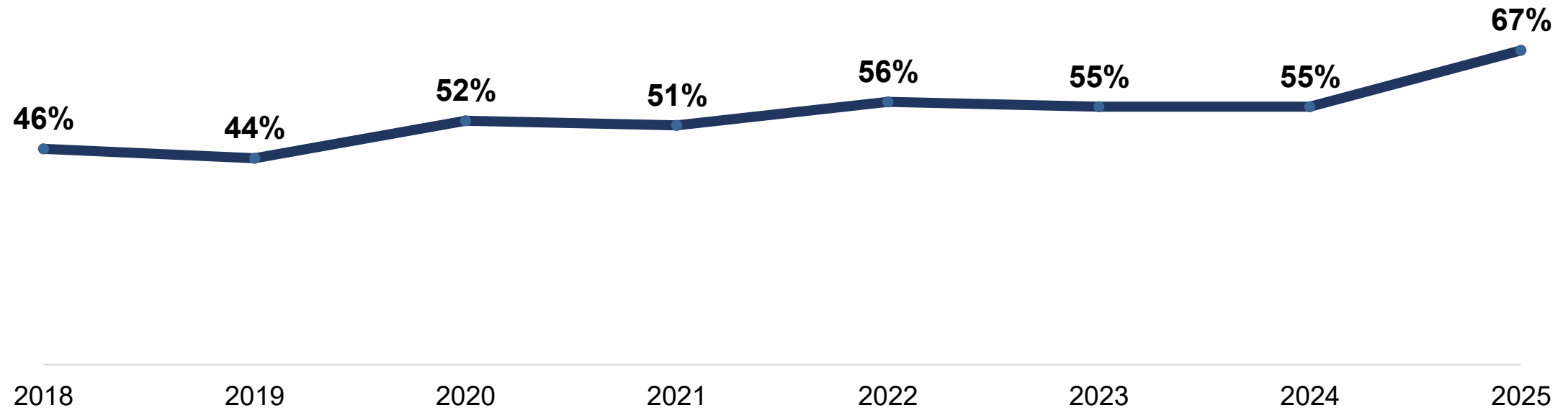
# Strategies Back-to-School Shoppers Intend to Apply to Save Money

“How are you planning to save money this year on back-to-school shopping?”



# Consumers Are Shopping Earlier Than Previous Years for Back-to-School

% of consumers who started their back-to-school shopping as of early July  
(by year)



# However, Majority of Shoppers Still Have At Least Half of Their Purchases Left to Complete

## Top reasons why shoppers are waiting

47%

Waiting for the best deals

84%

of shoppers still have at least HALF of their purchases left to complete

39%

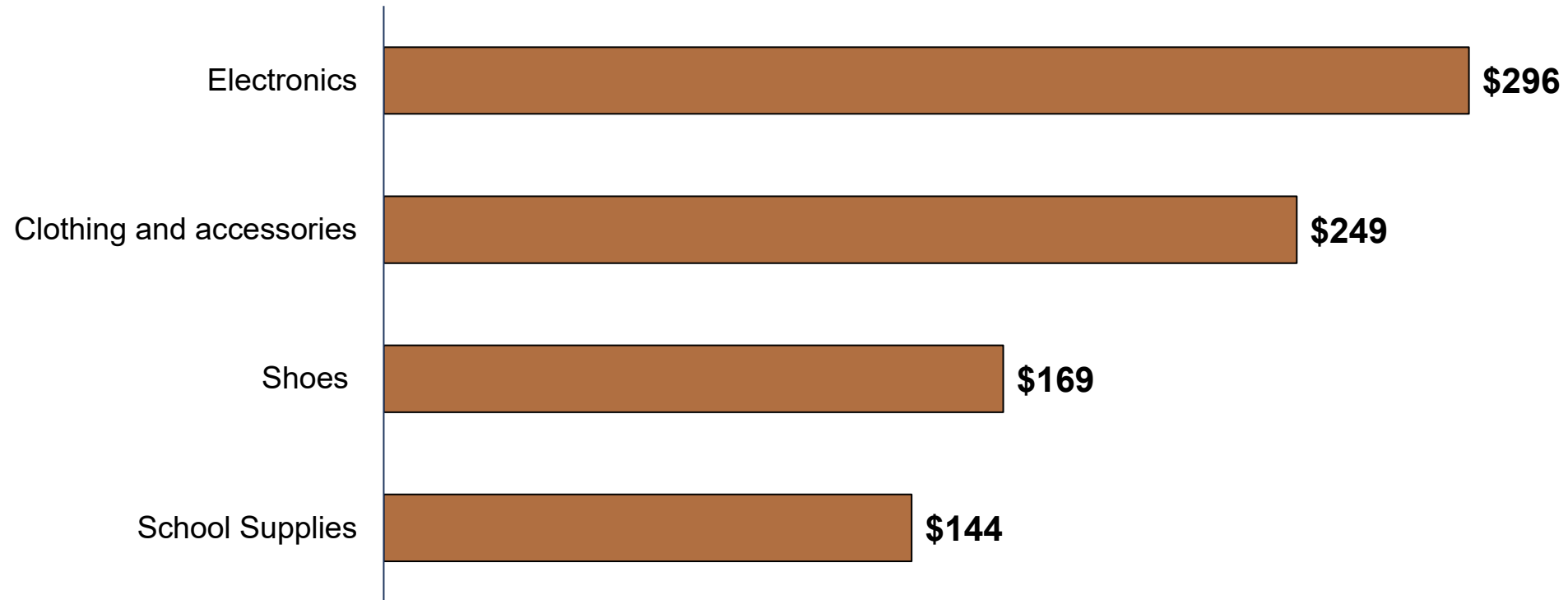
Don't know yet what's needed

24%

Planning to spread out their budgets

# Back-to-School Households Set to Spend the Most Money on Electronics in 2025

Estimated Spending by Category

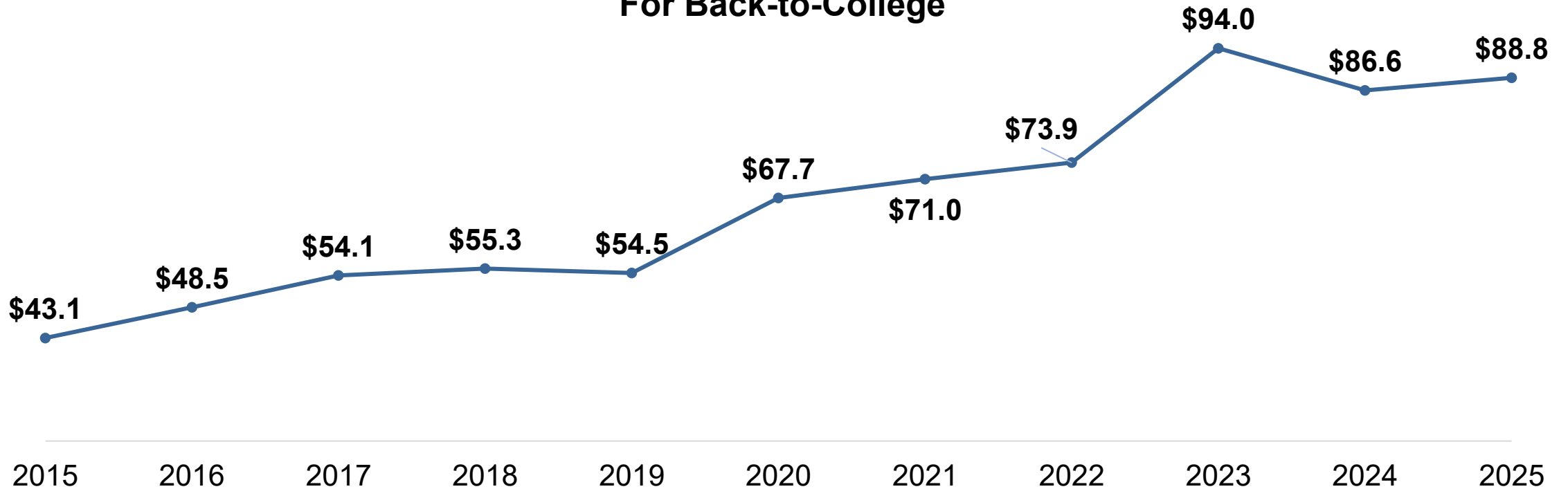


# Back-To-College Season Spending



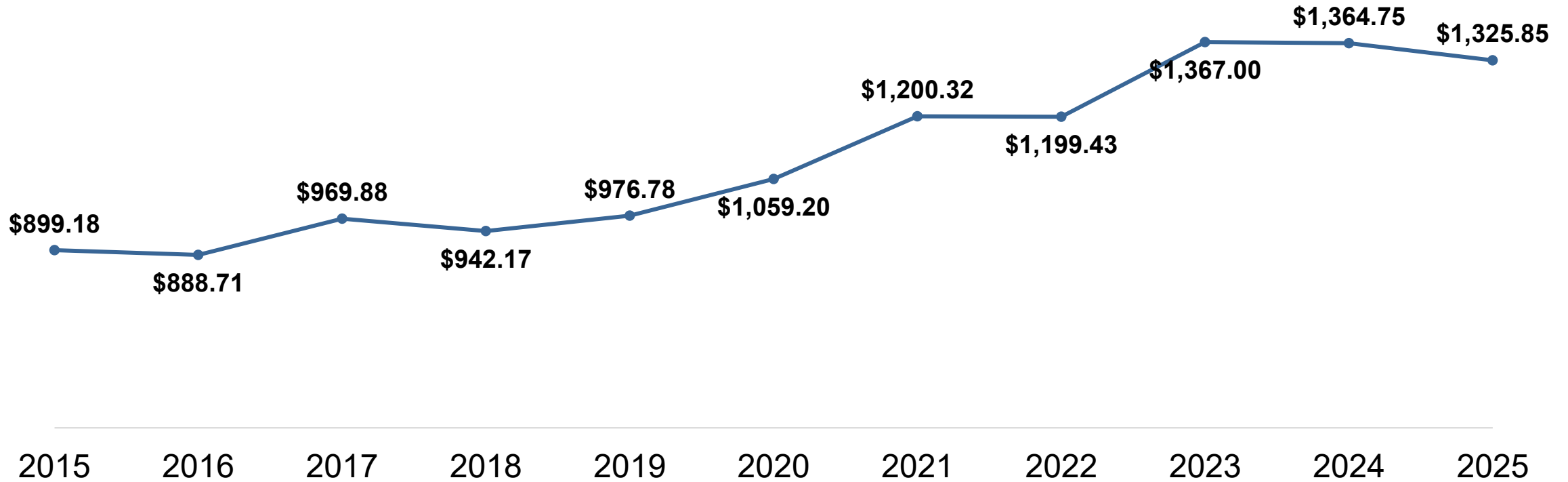
# 2025's Back-to-College Season Expected to Exceed 2024's \$86.6B

Total Expected Spending In Billions For Back-to-College



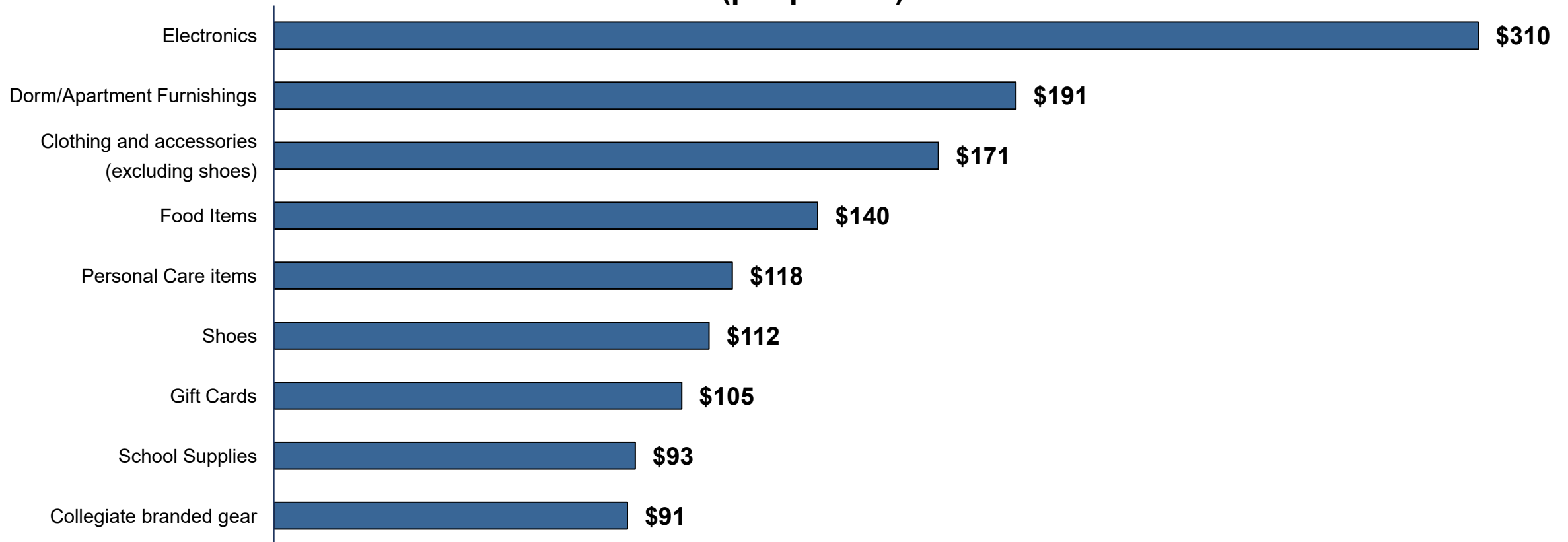
# Per Person Spending for Back-To-College is Set to Reach Third Highest Record in 2025

Total Expected Per Person Spending for Back-to-College



# The Top Categories for Back-to-College Shopping are...

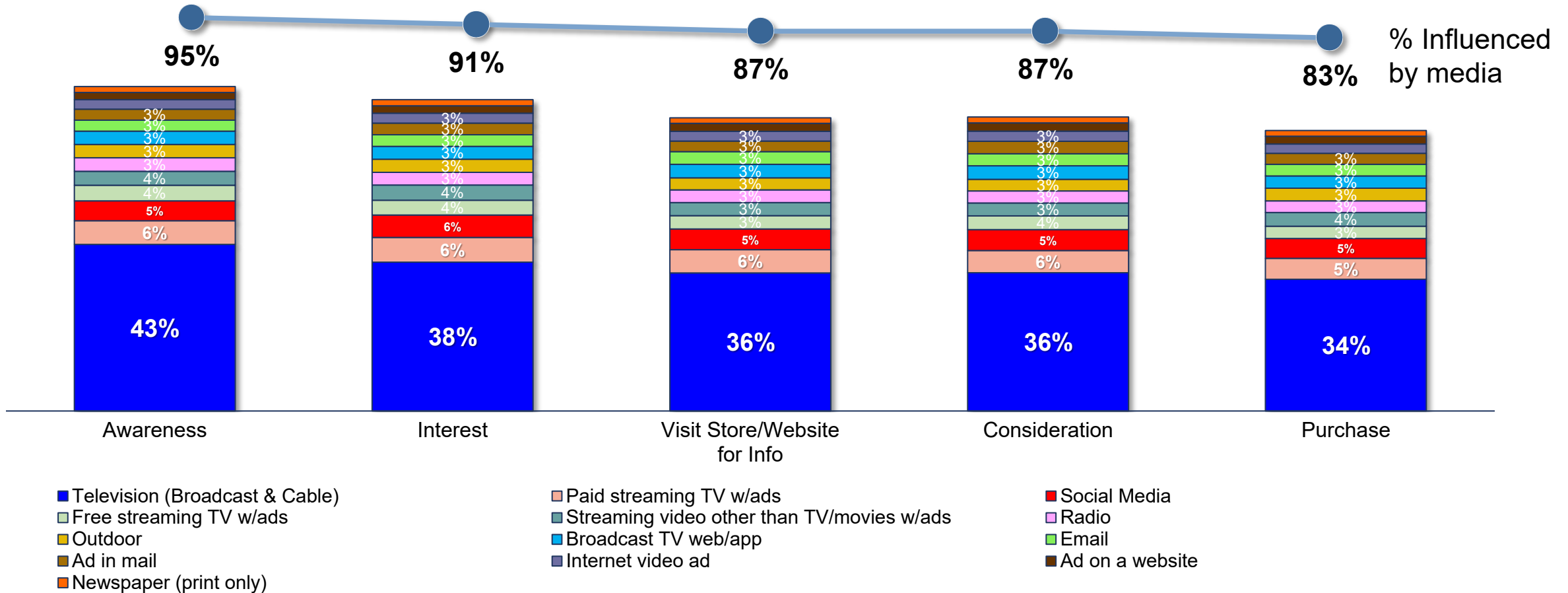
**Estimated Spending by Category  
(per person)**



**TV Advertising is  
Imperative to Influence  
Back-to-School Shoppers**



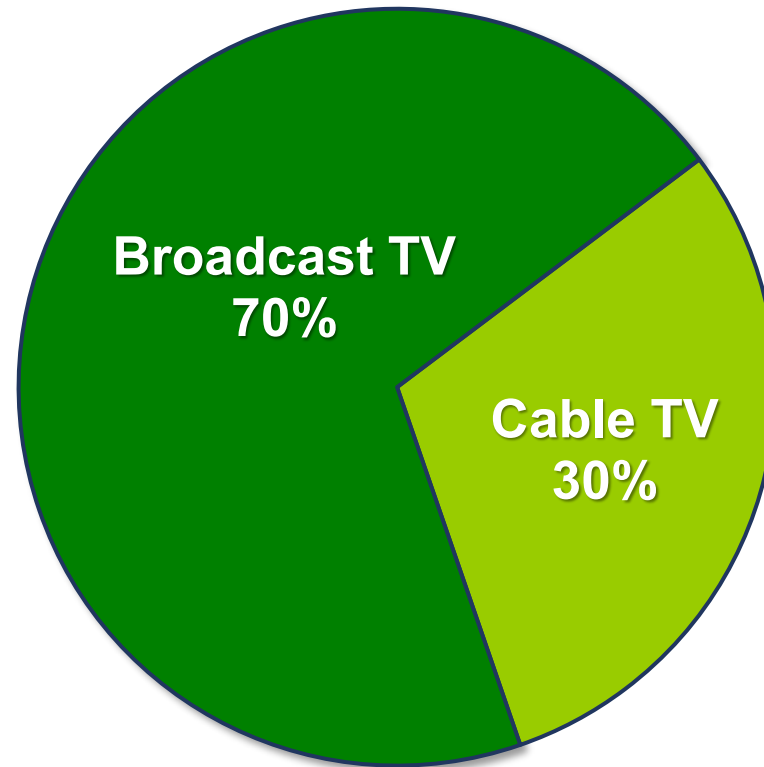
# What Influenced Consumers Most: Television



Source: GfK/NIQ TVB Purchase Funnel 2025 A18+  
 QA4/QA5/QA6/QA7/QA8 Most important for media with at least 1 funnel stage at 2%+ shown; 2%, 1%, & 0% not shown/labeled

# Of Those that Cited TV as the Most Important in Awareness Phase, 7 Out of 10 Picked Broadcast TV

All 6 Categories:



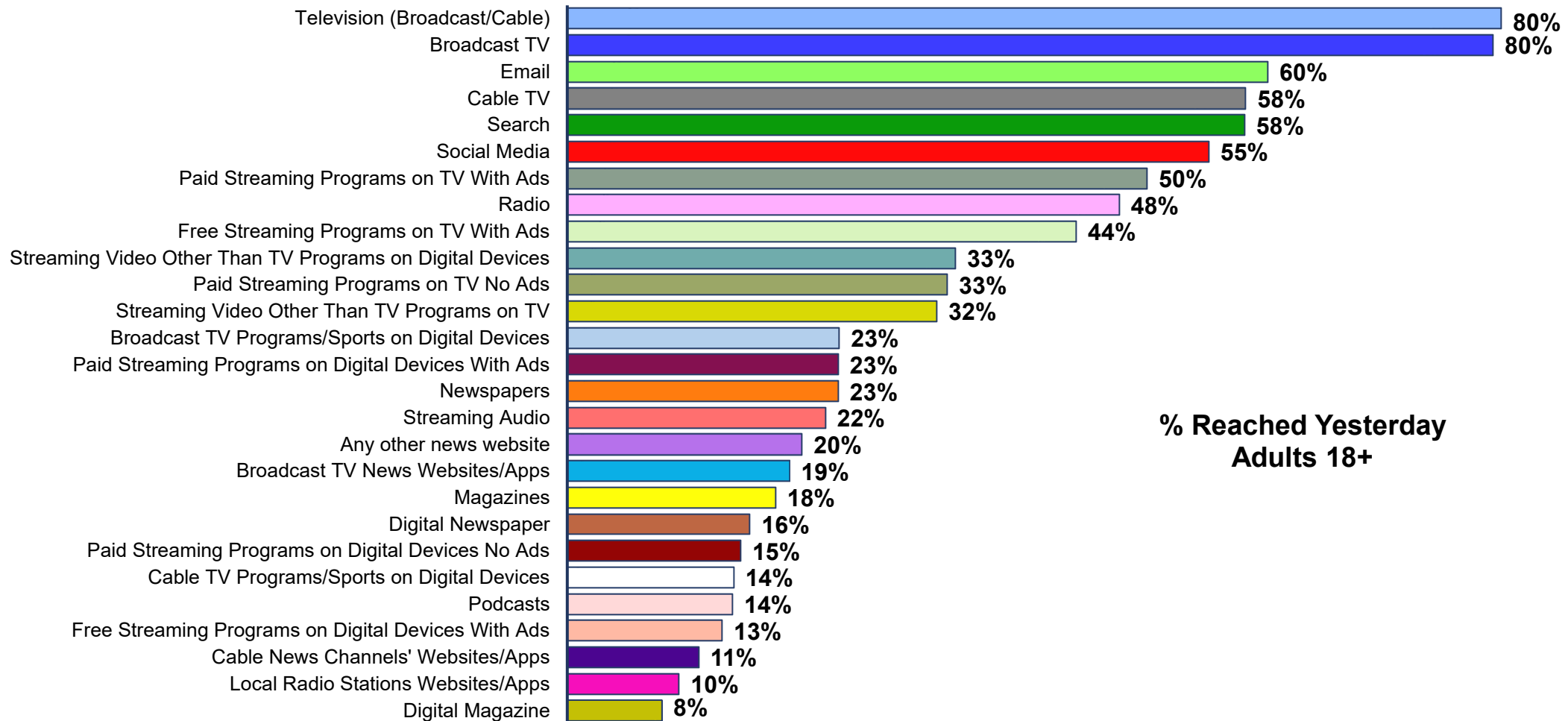
Source: GfK/NIQ TVB Purchase Funnel 2025 A18+

QA4 "Thinking about the ads you saw/heard for the categories, which advertising media made you most aware of the category?"

How to read: Of the 43% who chose television as most important, 70% chose broadcast TV

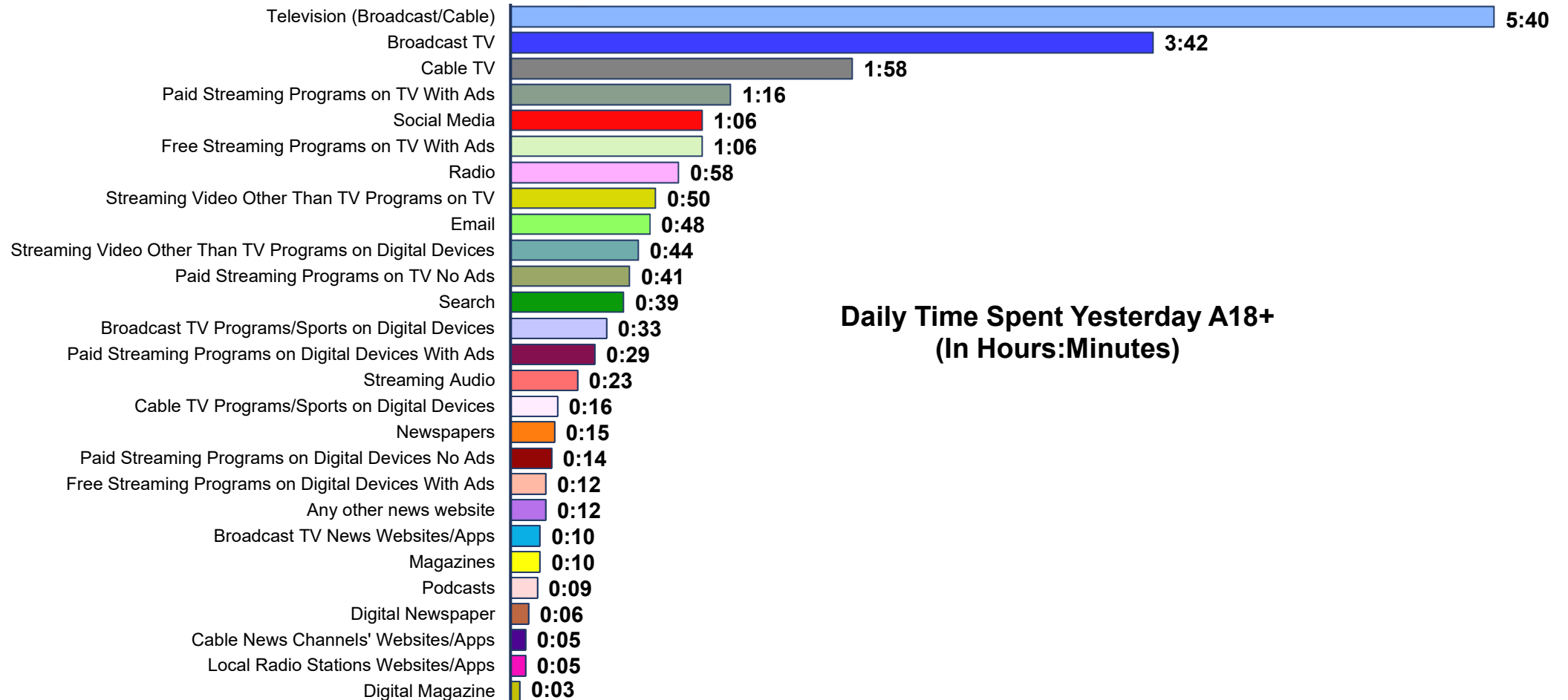
# TV Has Highest Reach of All Platforms

## Measured Broadcast Leads the Way



**% Reached Yesterday  
Adults 18+**

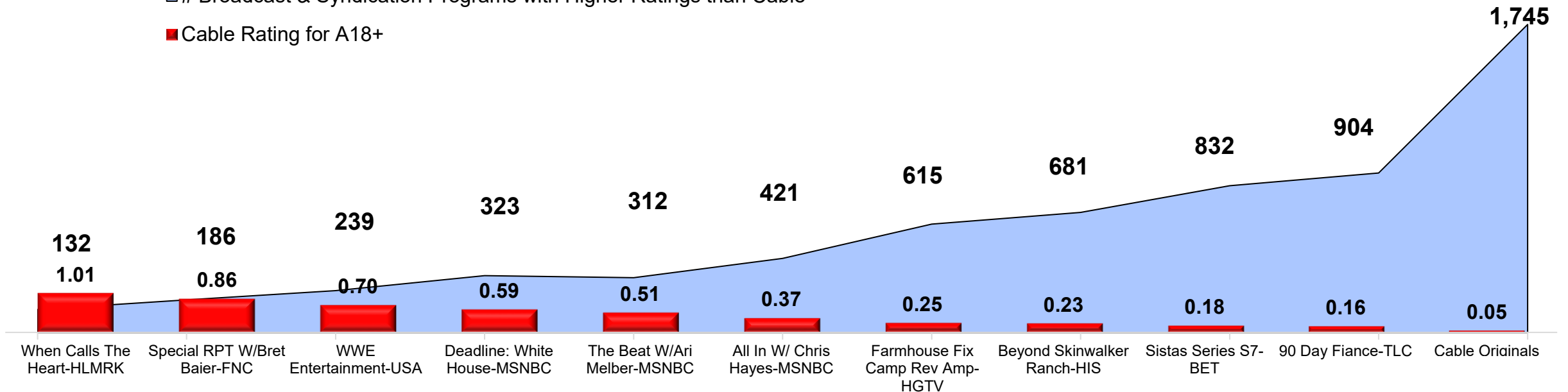
# People Spend the Most Time with Television



# Broadcast Programs During the Summer Outstrip Even Cable Originals

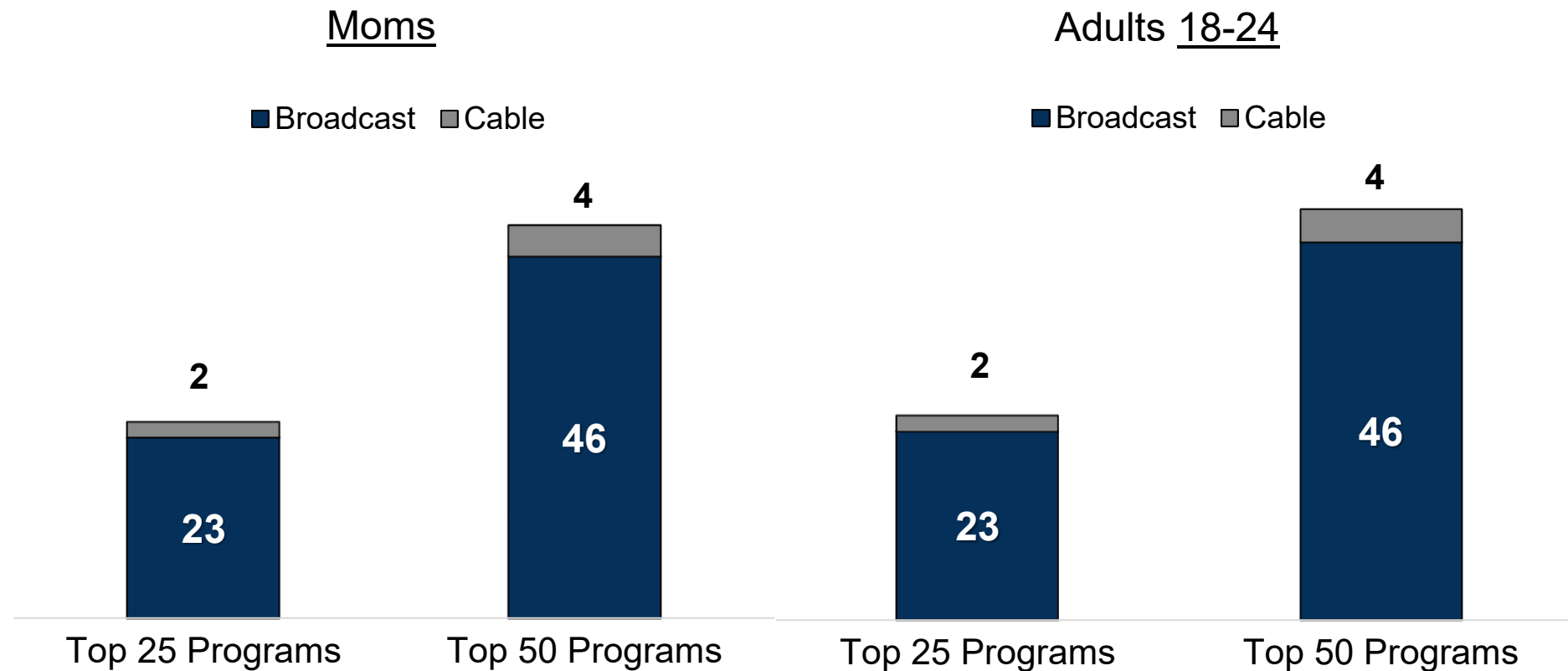
**To be read:** Hallmark's "When Calls The Heart" had a 1.01 average A18+ rating in June 2024. During the same time period, there were 132 Broadcast & Syndication programs that had higher average ratings.

■ # Broadcast & Syndication Programs with Higher Ratings than Cable  
 ■ Cable Rating for A18+



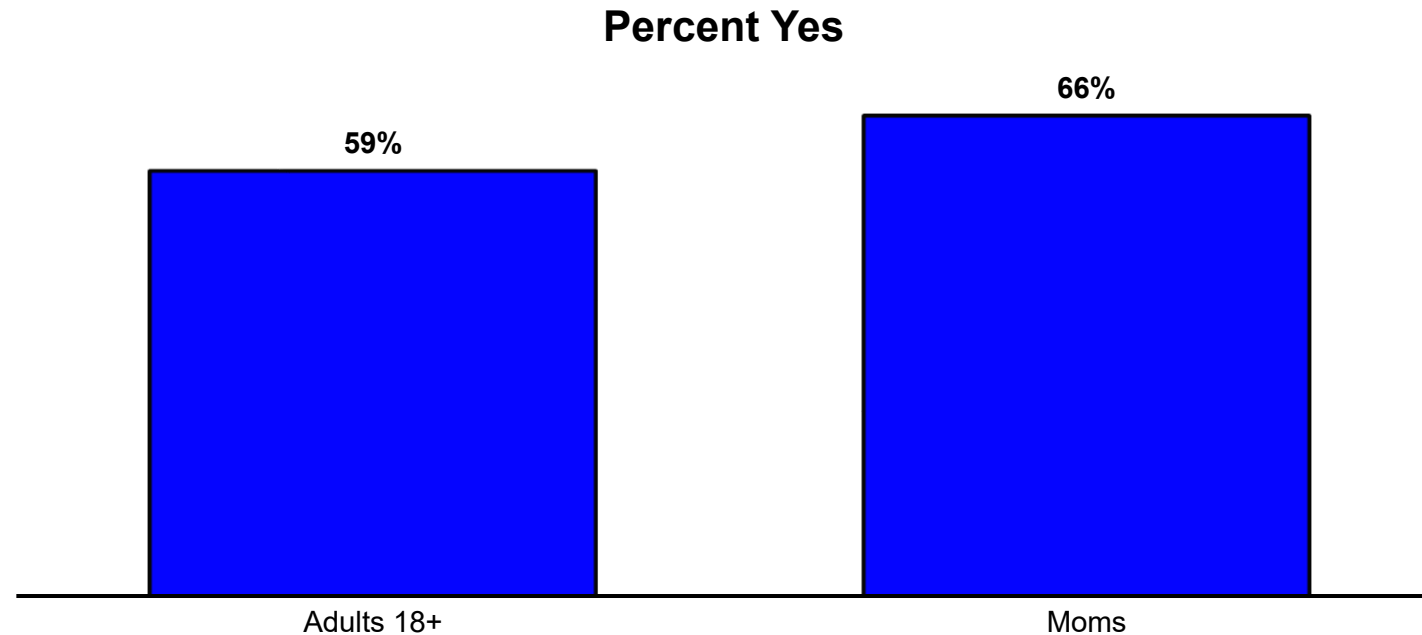
# Broadcast TV Tops in Summer Ratings

## Top Rated Programs



# TV Ads Are Motivation To Do Further Research Online For Moms

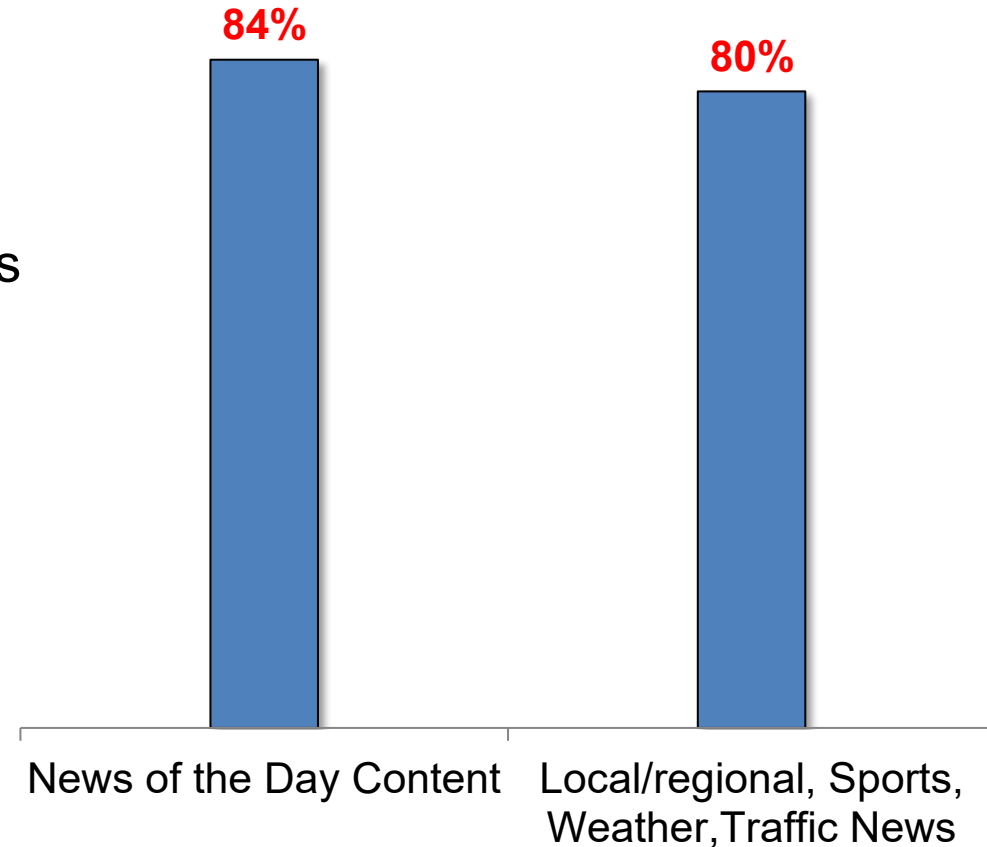
Has an advertisement on television motivated you to go to the Internet to find out more information about that product or service?



# 8 Out of 10 Retail Consumers Are Having Conversations About Topics That Local Station TV News Covers

## News of the Day

- Local/regional news
- National/international news
- Sports
- Weather
- Traffic/transit
- Politics

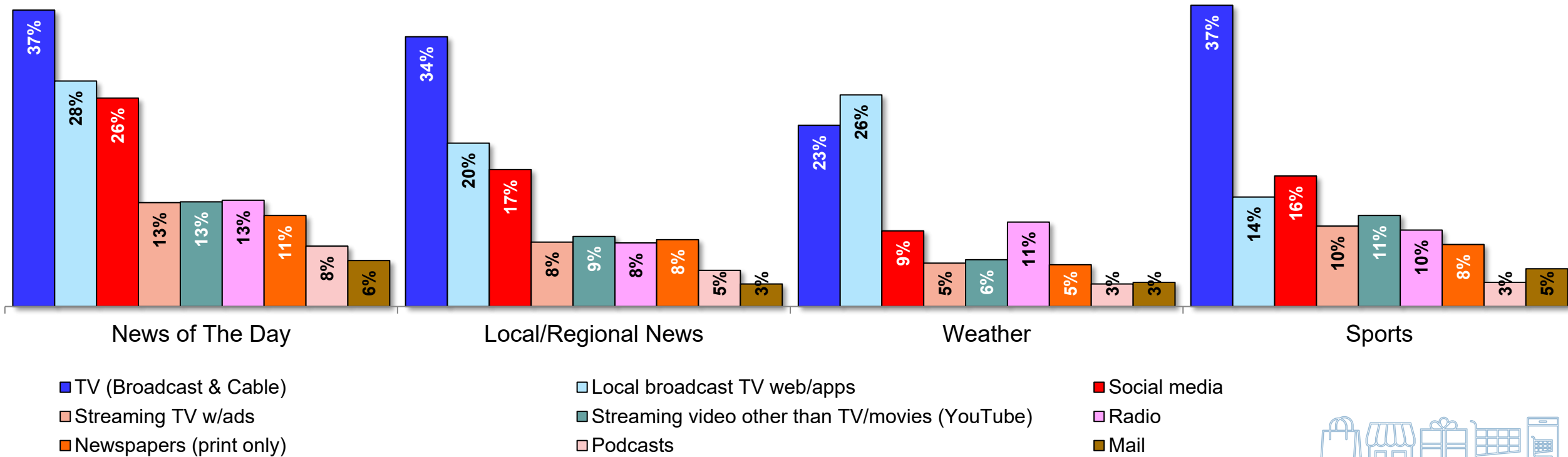


Source: GfK/NIQ TVB Media & Conversations Study 2025 A18+ Plan to purchase at a retail store (in-person or online) in the next year.

Q1 Please enter the approximate number of conversations you had in the past 24 hours. The conversations could have been face to face, on the phone, via email, on text, on social media or any other way you may have communicated with someone.

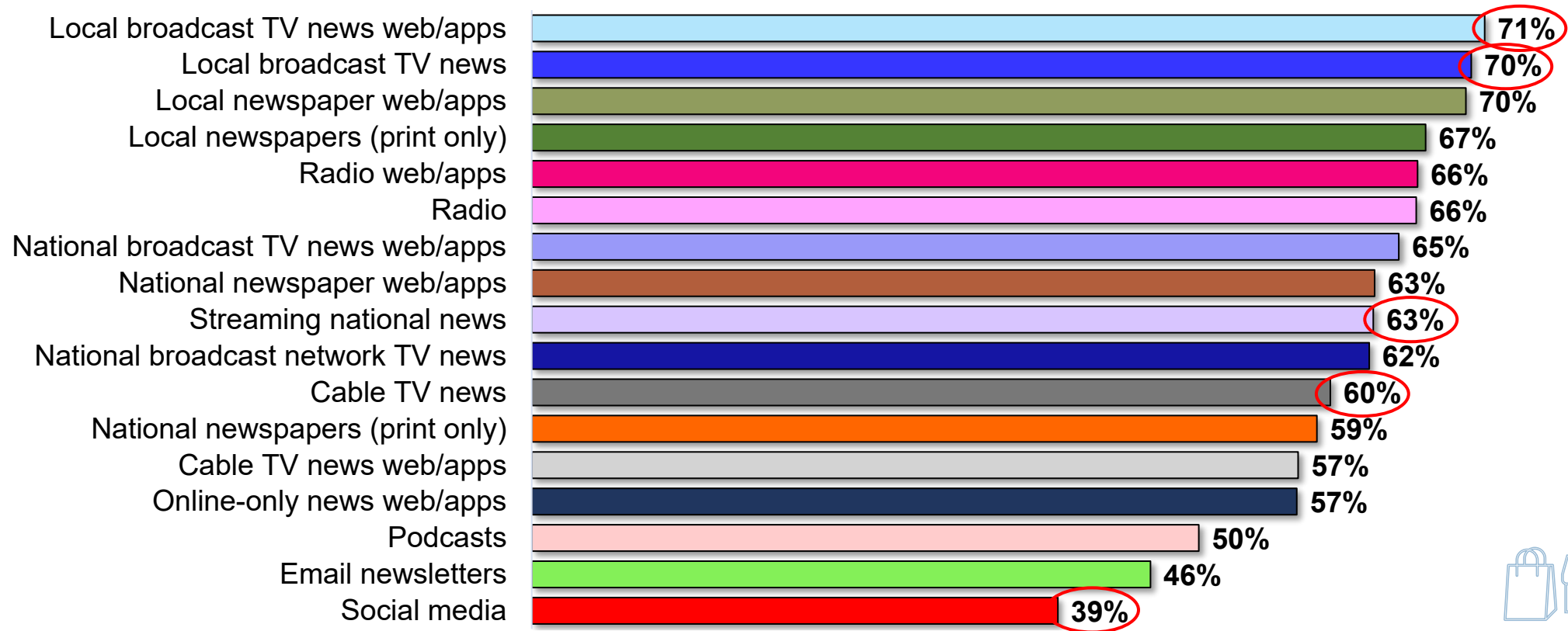
# Retail Consumers: Television Significantly Impacts Conversations About News

**% A18+ Retail Consumers**  
**Conversations Affected By External Factors, either as a conversation spark or through being referenced in conversation.**



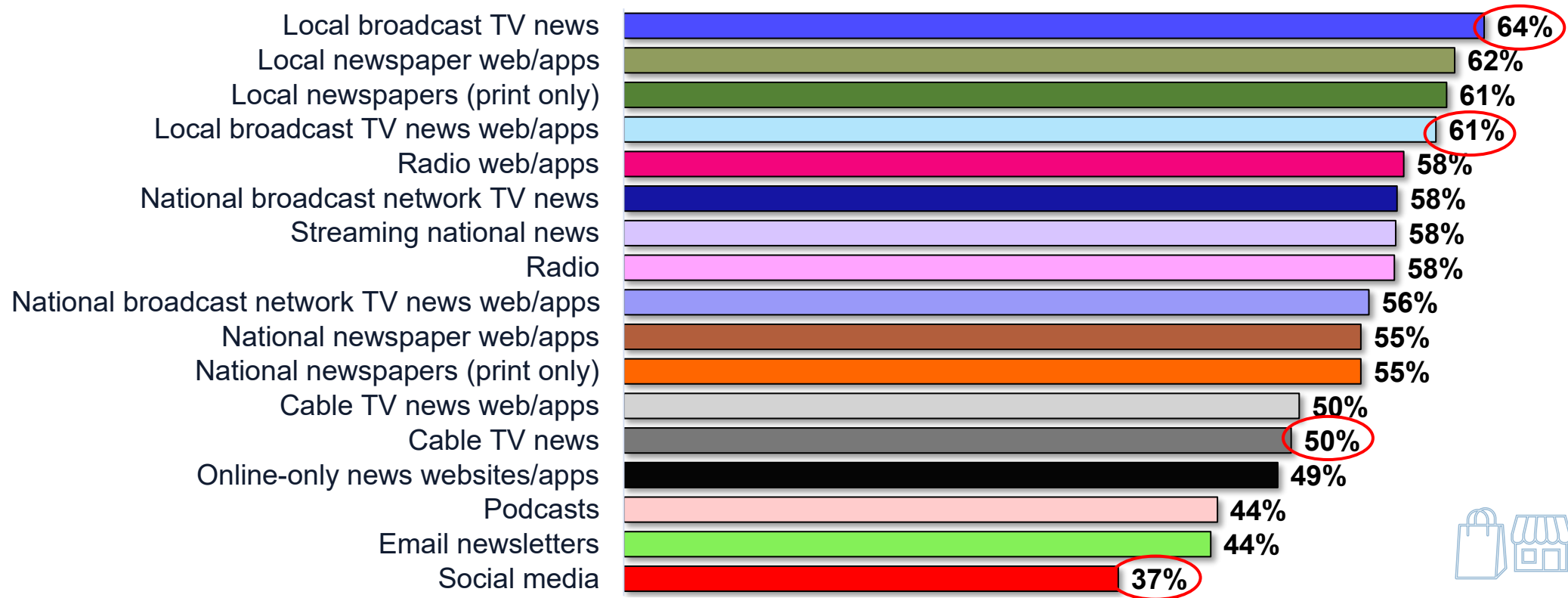
# Local Broadcast TV Assets Are #1 For Trust, Far More Than Cable, Streaming, and Social Media

**% A18+ Retail Consumers Agreeing  
"I trust the news that I see/hear on..."**



# “How likely are you to believe what somebody tells you if they say they heard about it from this source?”

**% A18+ Retail Consumers  
Likely to Believe What They See/Hear From This Source...**



**Recognize Each Market's  
Seasonal Timing &  
Strength with Local TV**



# Availability of Brand/Product

Not all retailers are **fully distributed** in the U.S.

**Product usage** is different by state or market

Brands, Retail Stores, Restaurants, and Automotive Dealers have varied **concentrations** in different regions of the U.S.

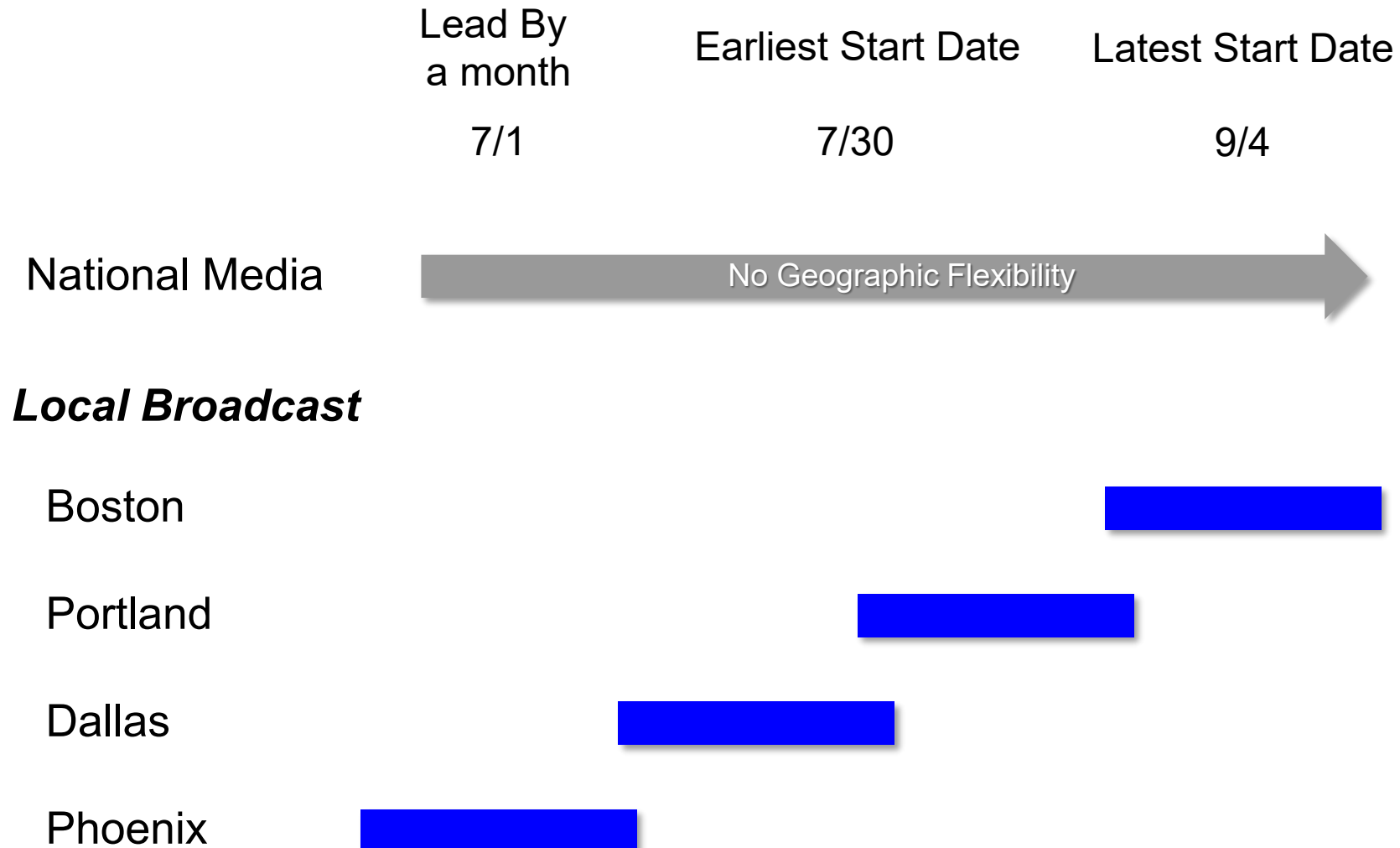
# Capitalize on Local Sales Strength

Every brand has **geographic areas of opportunity** – where advertising is most likely to produce sales

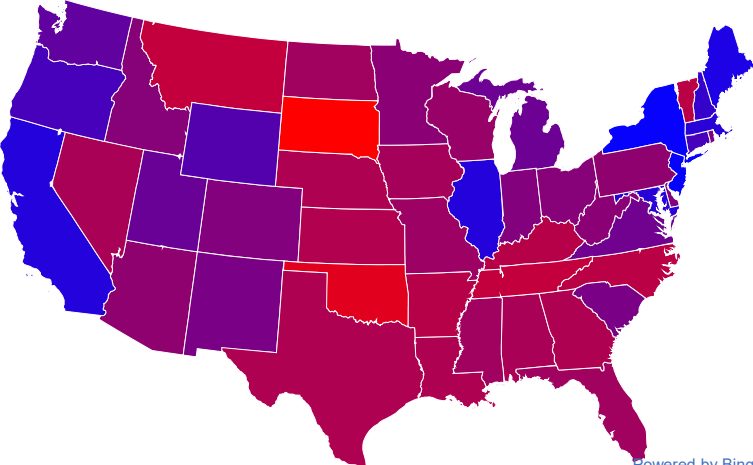
Geographic targeting with local TV focuses on **high response areas** and delivers **high-potential customers**



# Start Advertising When it's Right for Your Market with Spot TV



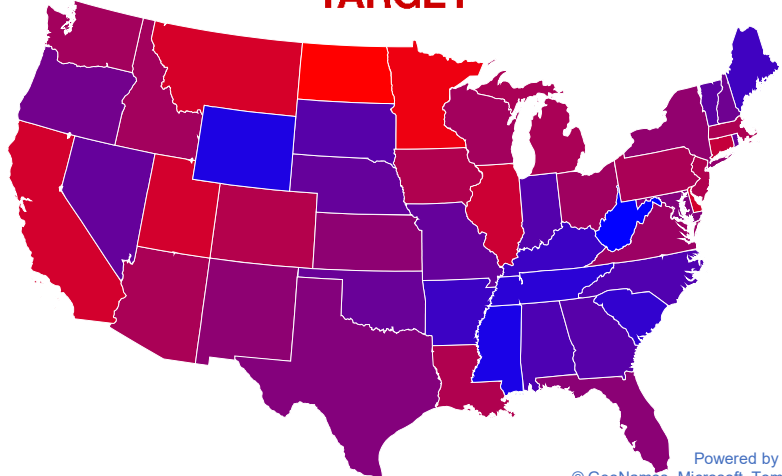
# Different Markets Have Different Needs. One Size Fits All Approach does NOT work.



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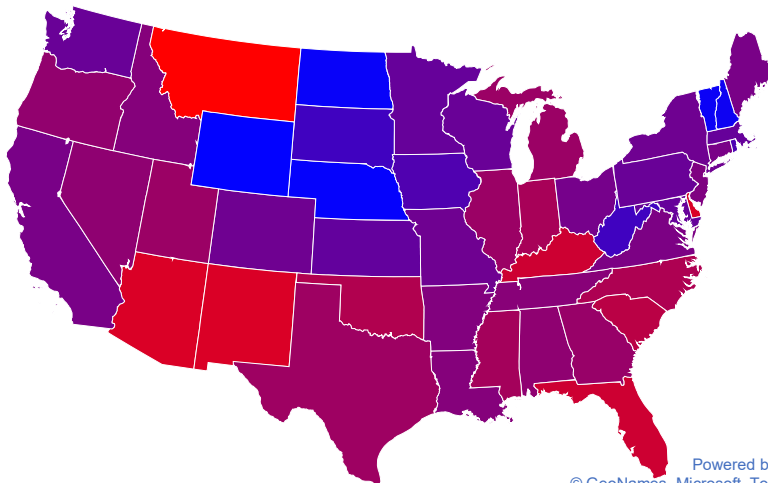
TARGET



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DOLLAR TREE

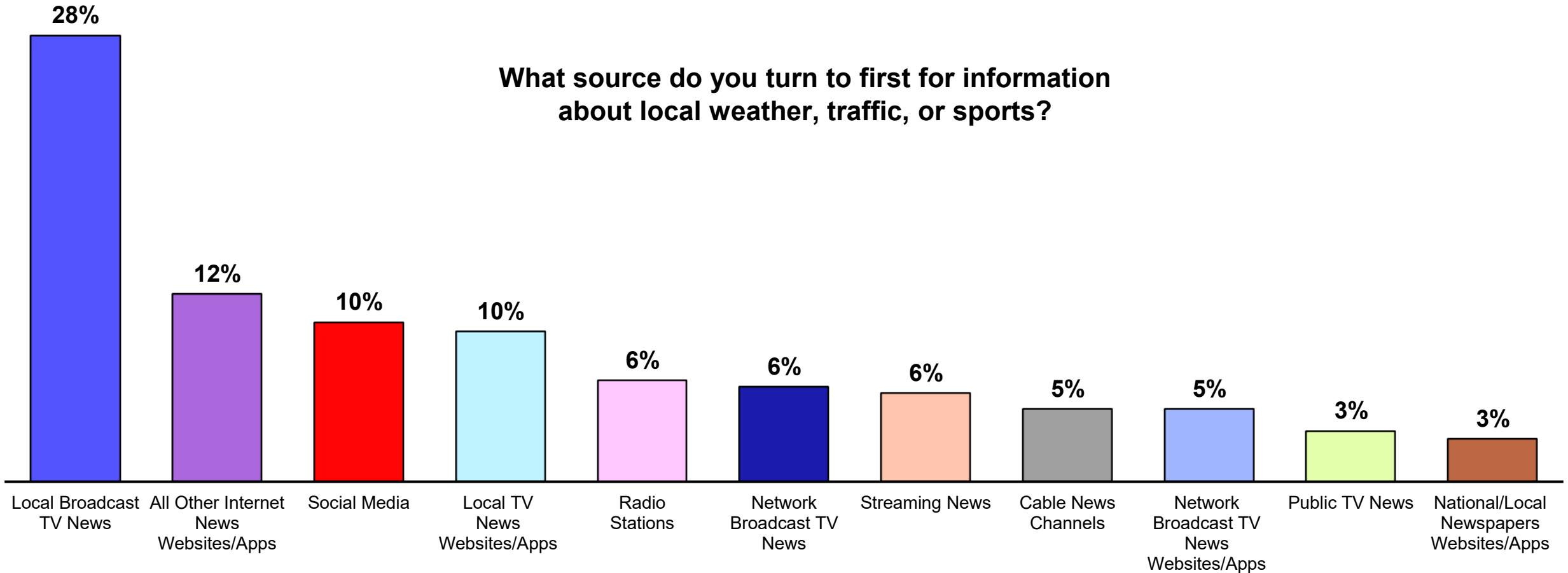


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 The Redder, The Better - The Higher The Sales Index



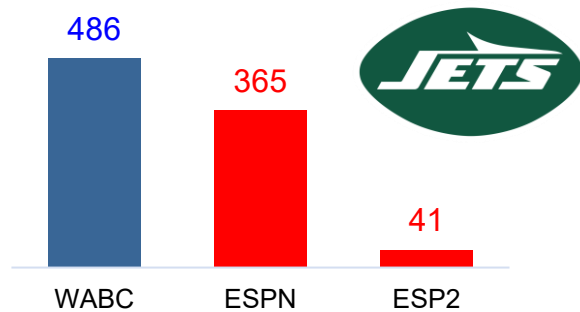
# The Primary Source For Local Traffic, Weather & Sports: Local Broadcast Television News



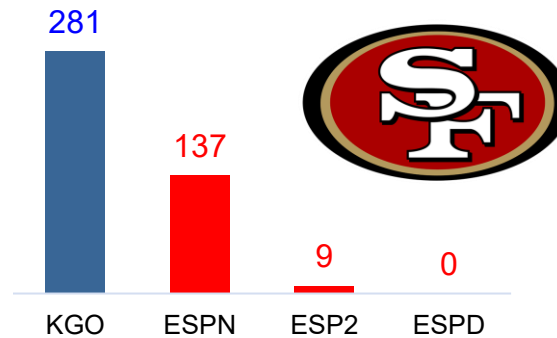
Source: GfK/NIQ TVB Media Comparisons Study 2025. Persons 18+. Includes only those who chose a media. Q06 - What source do you turn to first for information about local weather, traffic, or sports? Cable News Websites/apps, National Newspapers, Streaming Radio & Podcasts were under 2% each. Streaming news includes programs like ABC News Live, NBC News Now, Live Now from Fox on Roku, Tubi, etc.

# Games Simulcast on Both Broadcast & Cable do Better on Broadcast

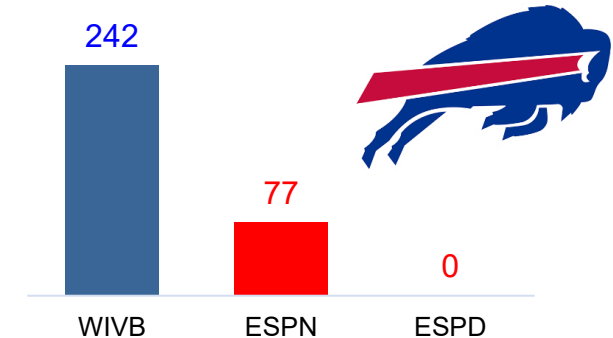
New York 9/9/24  
HH 000's



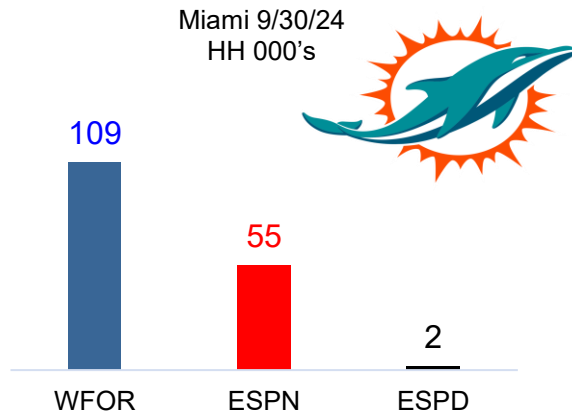
San Francisco 9/9/24  
HH 000's



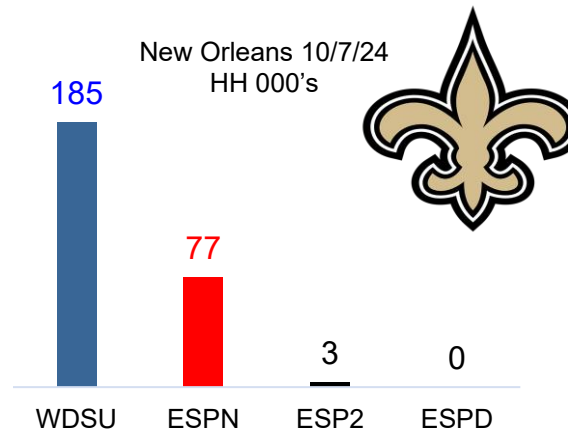
Buffalo 9/23/24  
HH 000's



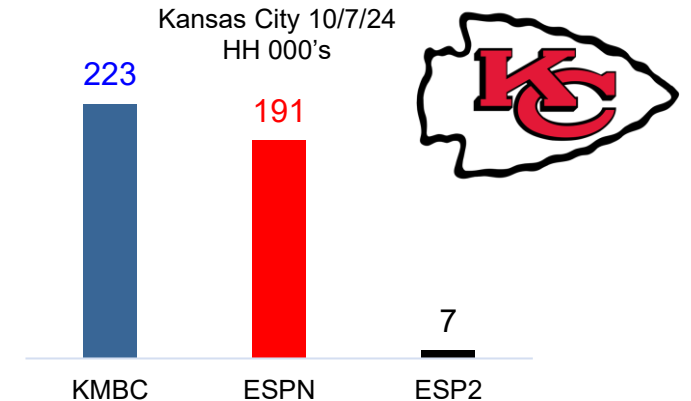
Miami 9/30/24  
HH 000's



New Orleans 10/7/24  
HH 000's

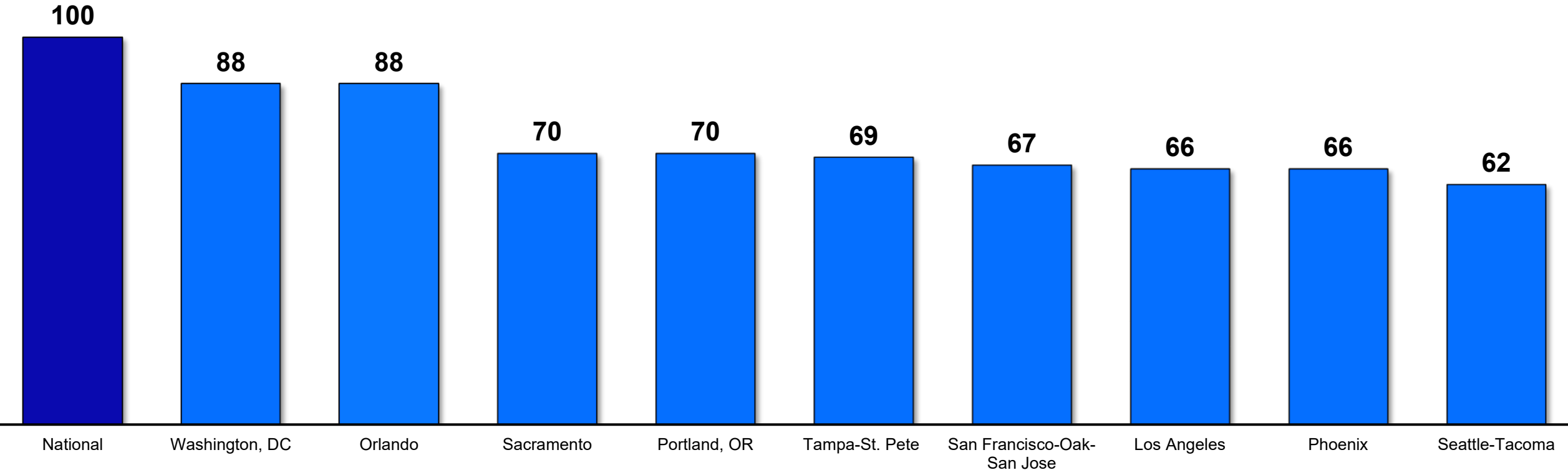


Kansas City 10/7/24  
HH 000's

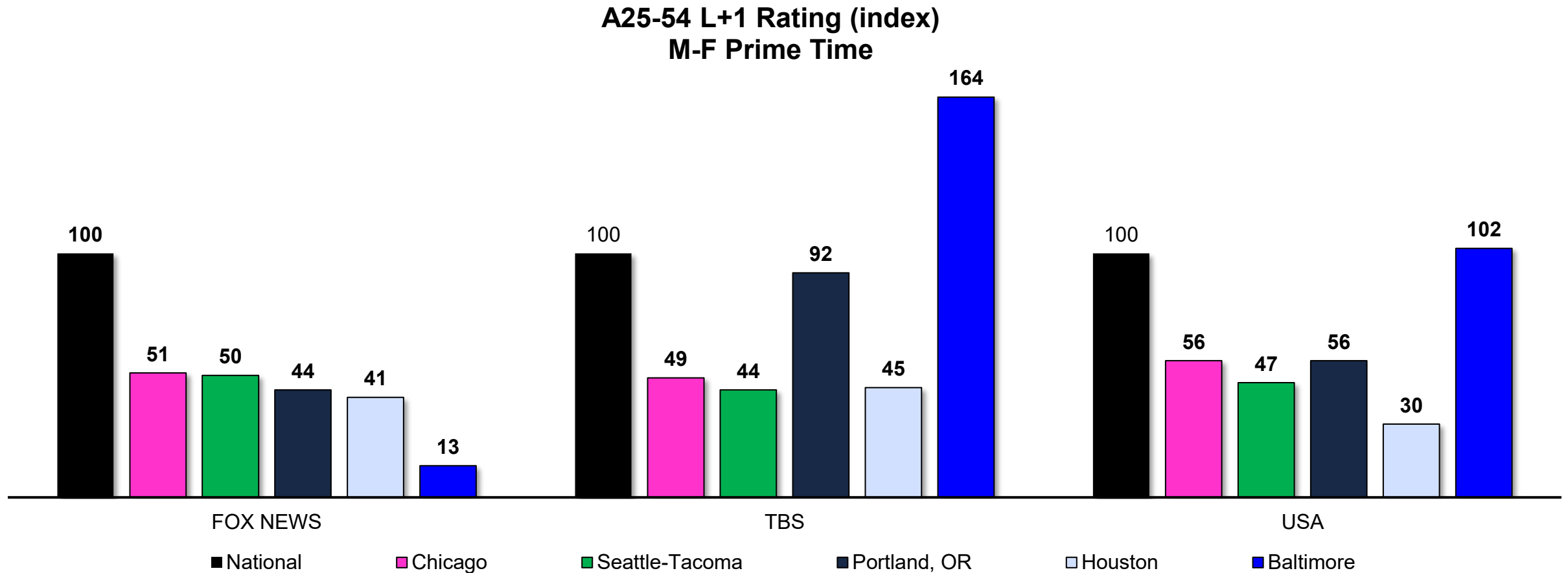


# Buying Network TV Only, Can Significantly Underdeliver Key Markets

Low Indexing LPM Markets Compared to National Delivery  
A25-54 L+1 Rating (index)  
Prime Time



# National Cable Delivery Fluctuates Widely Locally and Can Result in Dramatic Under Delivery in Key Markets

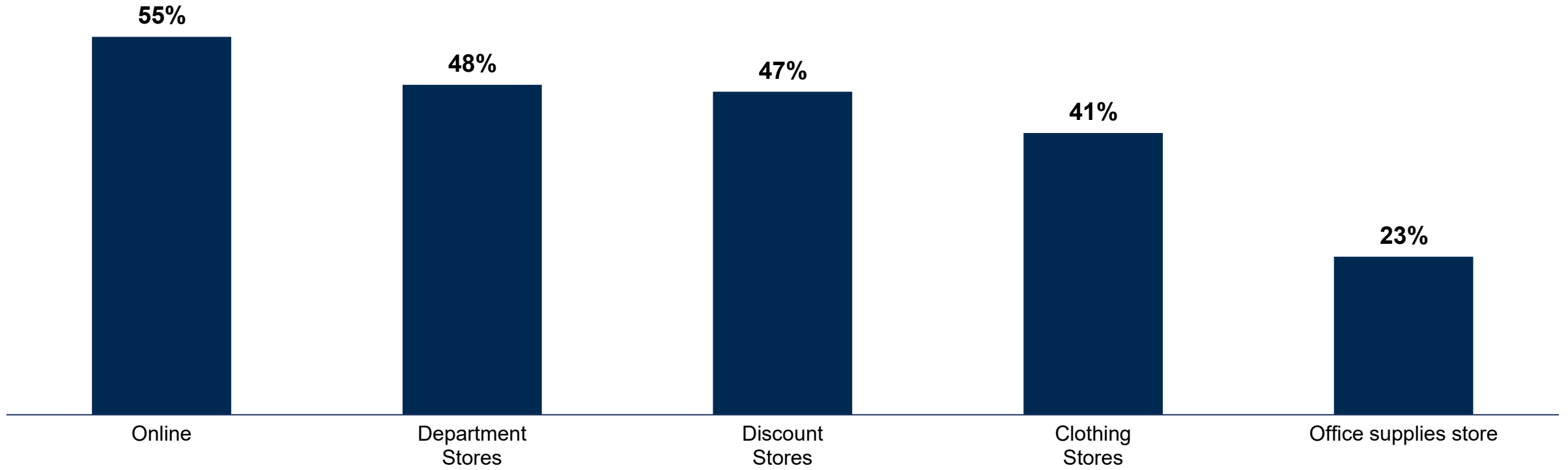


**Regardless of How  
Consumers Shop,  
Local TV Assets Are Key**



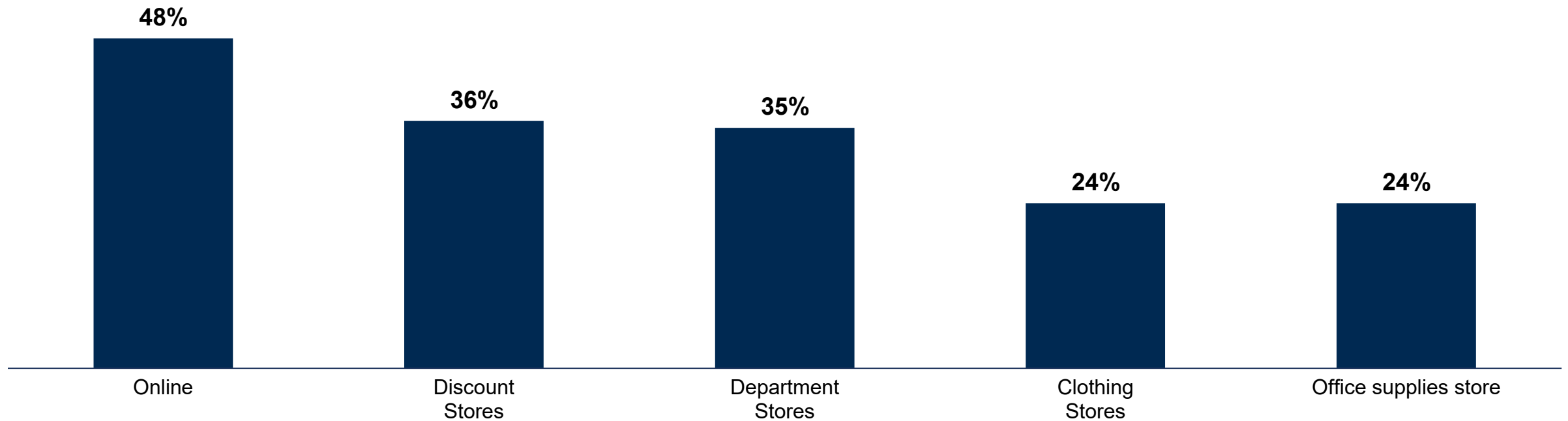
# 55% of Back-to-School Shoppers Plan on Shopping Online in 2025

Top 5 most popular shopping destinations  
(% of shoppers)



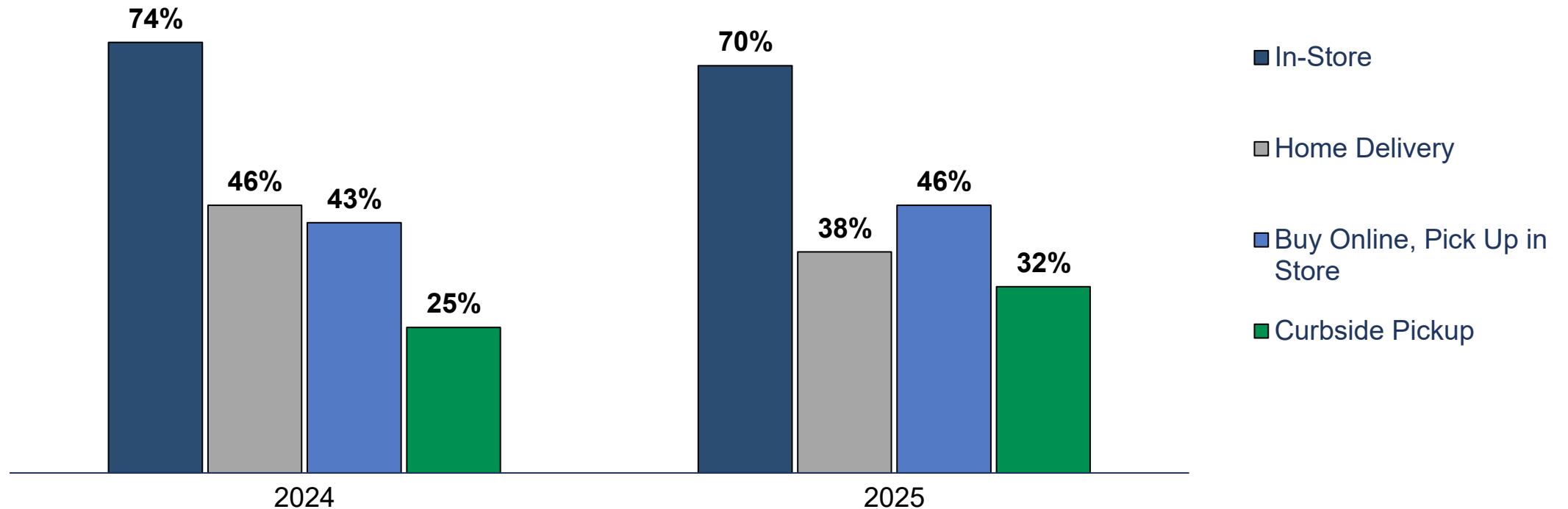
# Half of Back-to-College Shoppers Plan on Shopping Online in 2025

Top 5 most popular shopping destinations  
(% of shoppers)



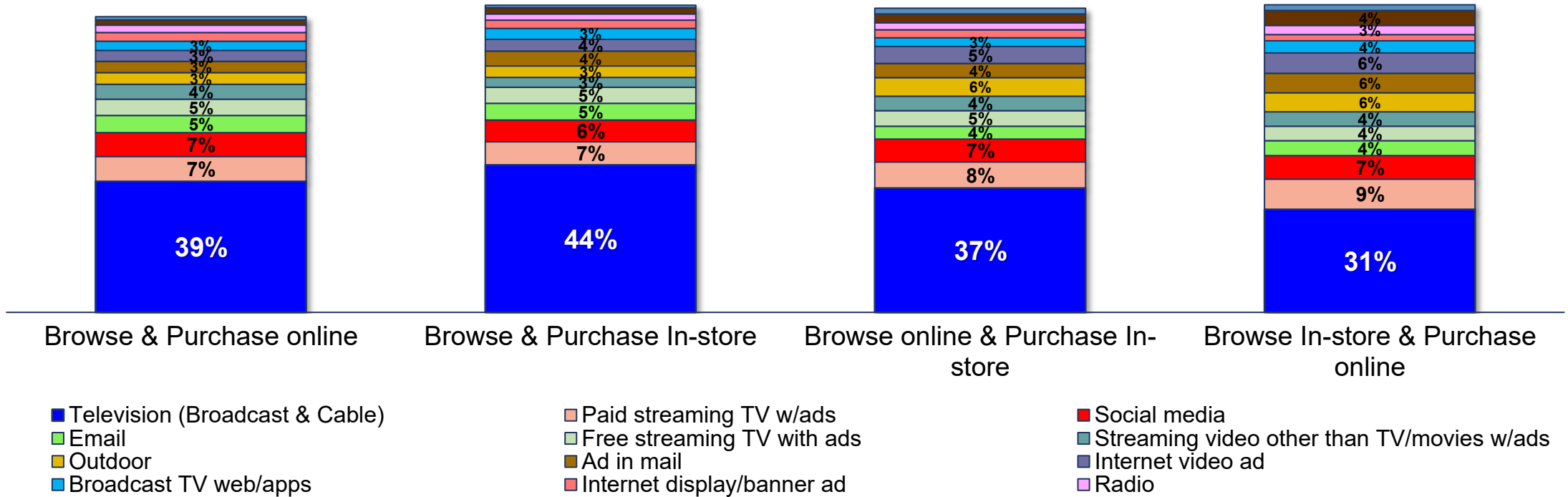
# The Percentage of Online Shoppers Opting to Pick Up at Store or Curbside Has Grown

“How do you plan to shop for back-to-school this year?”



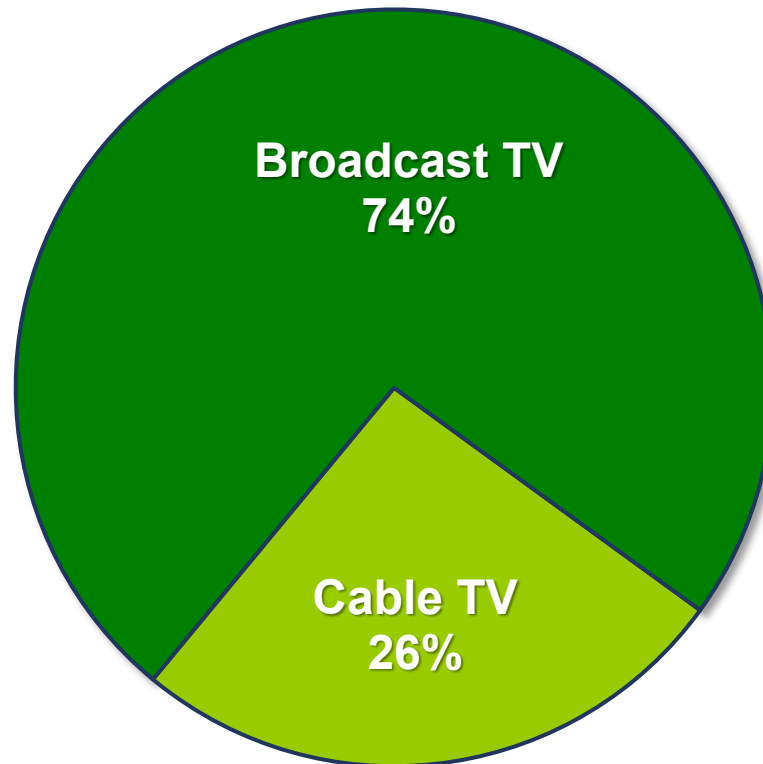
# What Influenced Consumers Most For Retail: Awareness

% A18+ Retail (In-store & online)



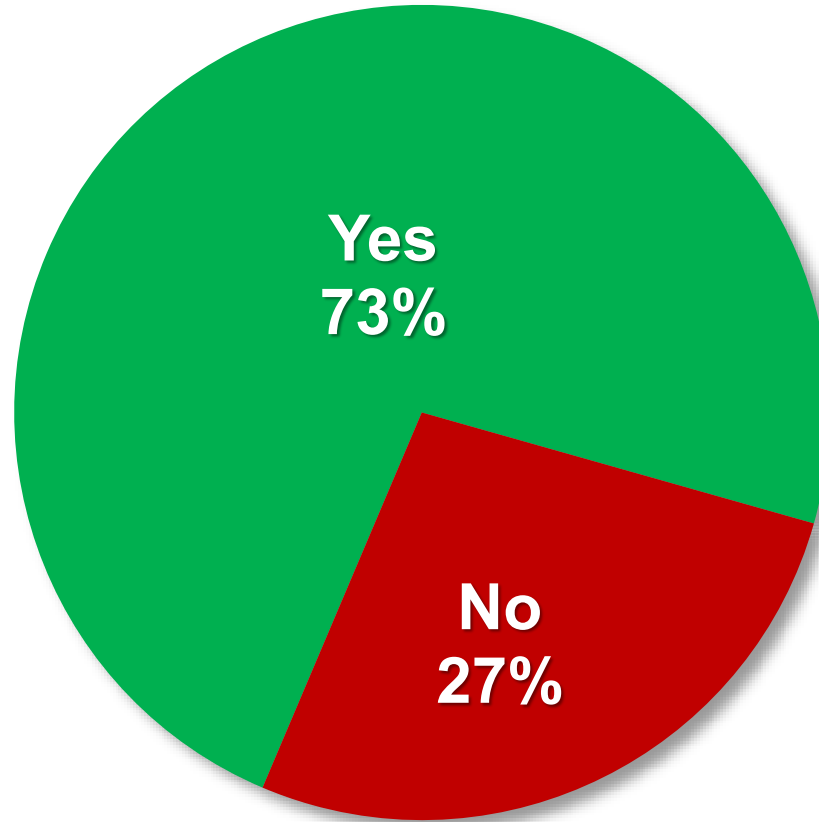
# Of Those that Cited TV as the Most Important in the Awareness Phase, 74% Picked Broadcast TV

**% A18+ Retail (In-store & online)**

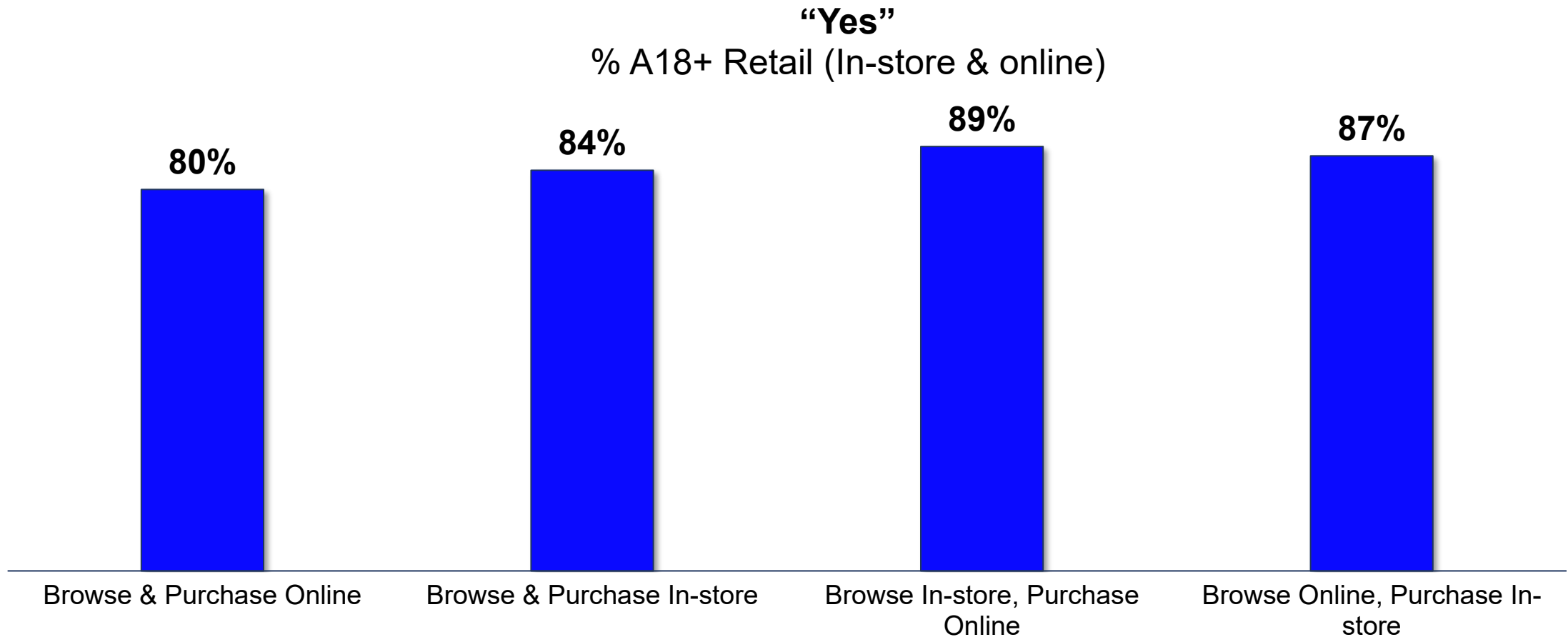


# “When Visiting a Television Station’s Website or App, do you View the Ads?”

% A18+ Retail (In-store & online)



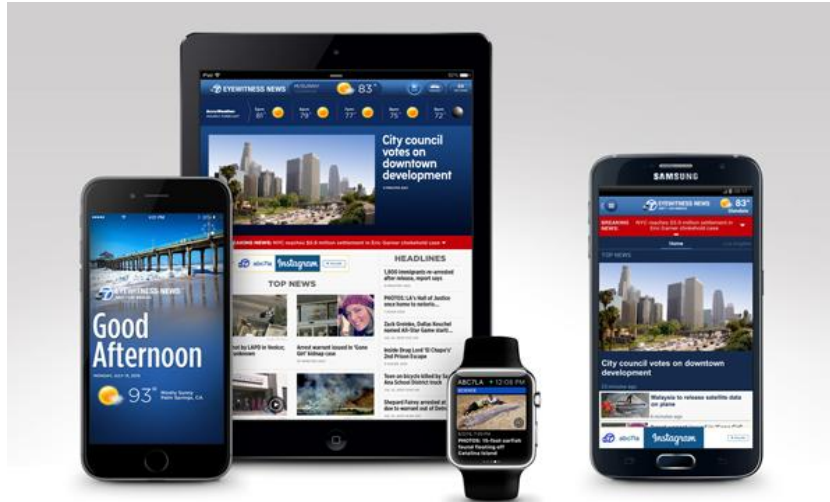
# “Have TV ads influenced your search selections?”



Source: GfK/NIQ TVB Purchase Funnel 2025 Retail Category A18+

QA10 “When doing an online search, how often, if at all, have TV ads you have seen in this Category influenced you in some ways in your search?” (Yes = combination of Every time, Most of the time & Sometimes) Among those who do online searches.

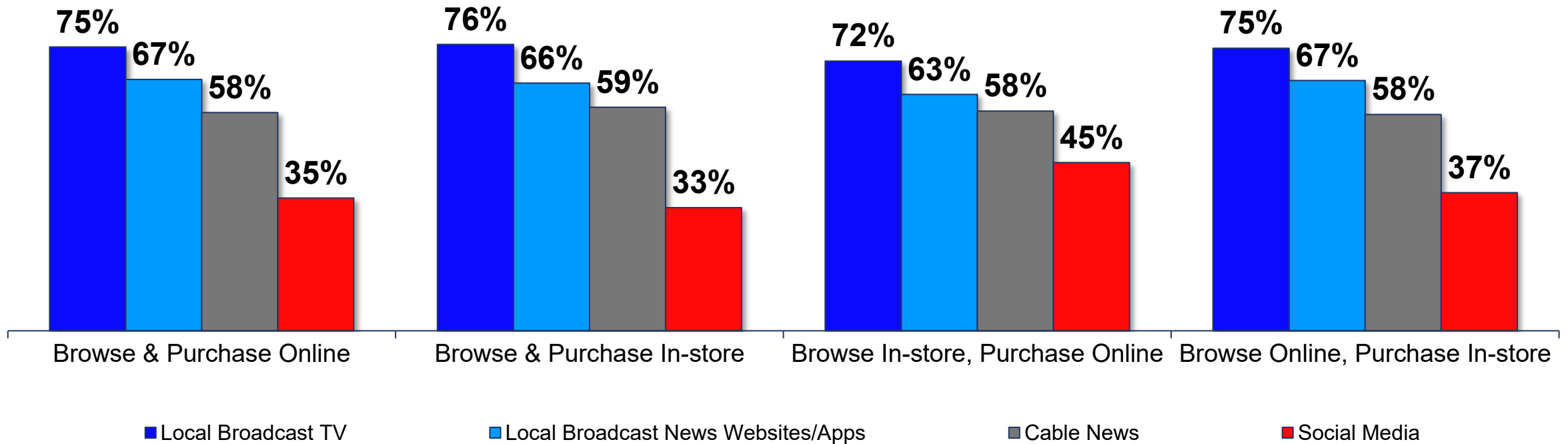
# Broadcast TV Websites/Apps Provide Multi-platform Opportunities



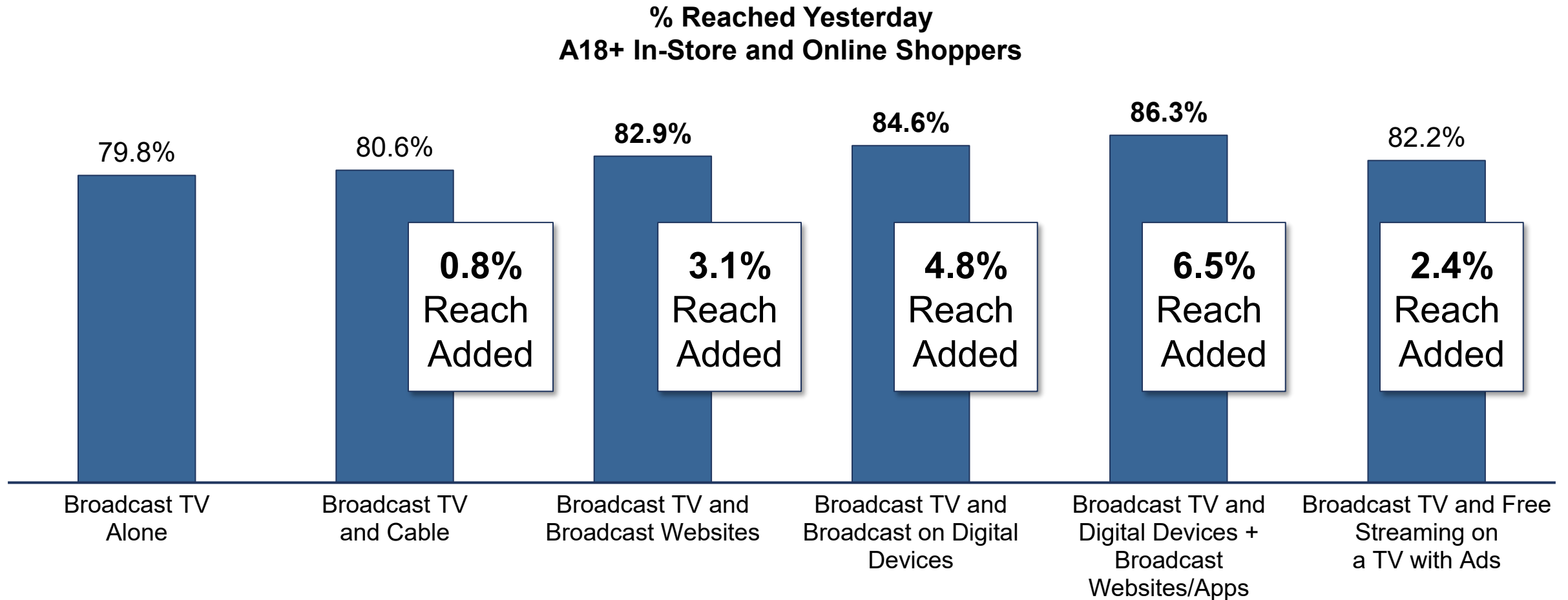
# Regardless of Physical Retail Methods, Shoppers Highly Trust Local TV Assets

**“I trust the news I see/hear on this media source.”**

Retail (In-store & online)  
% A18+ Agreeing

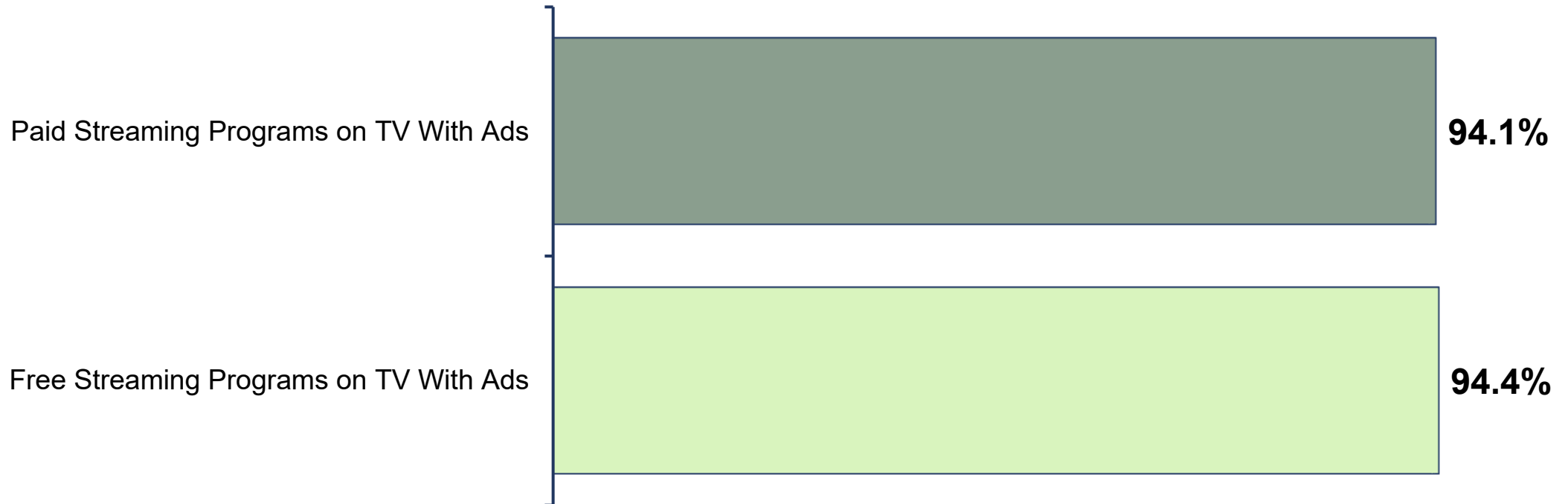


# Broadcast Websites & Broadcast TV on A Digital Device Added More Reach to Broadcast TV Than Cable for In-Store and Online Shoppers



# If They Are Streaming with Ads, They Are Reached by Broadcast as Well

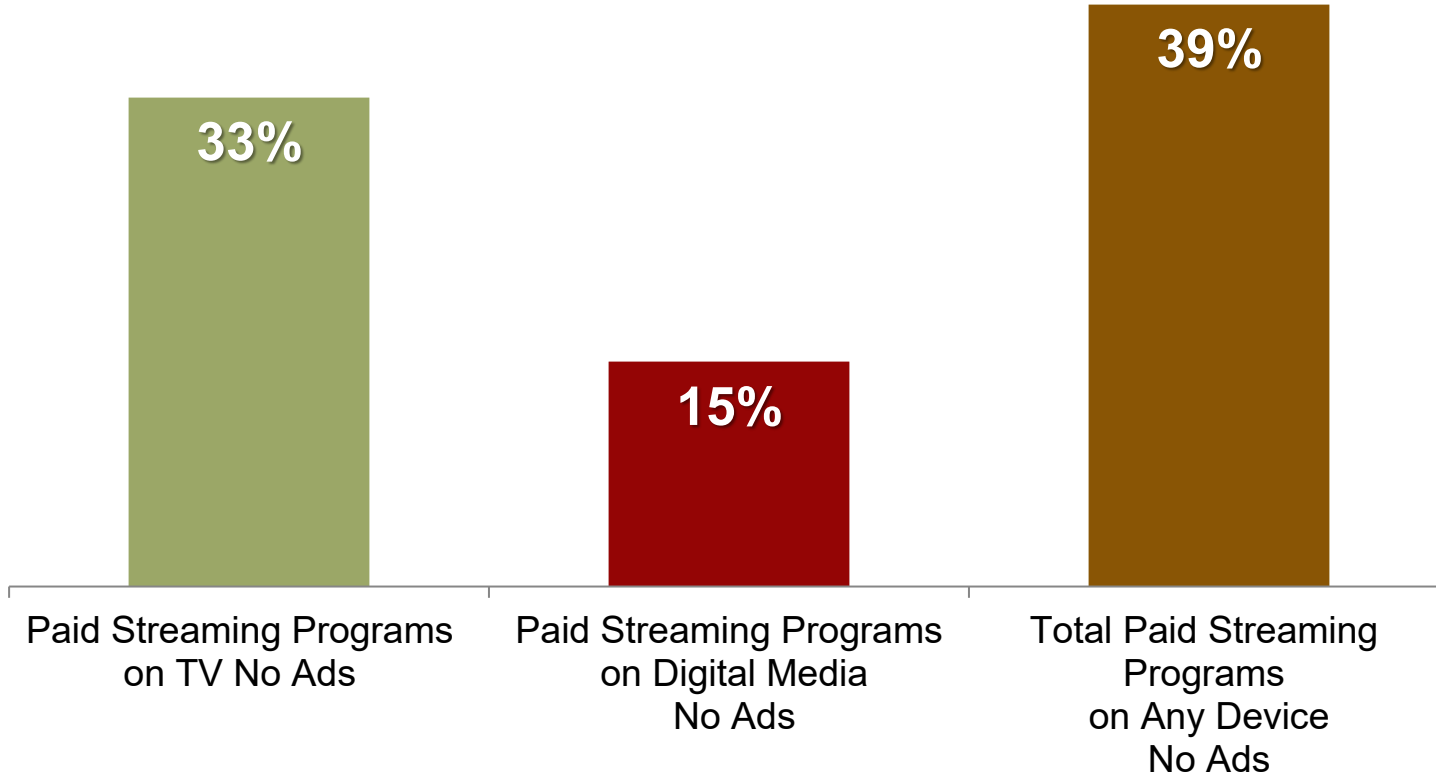
## A18+ In-Store and Online Shoppers Percent of Each That Are Reached by Broadcast TV



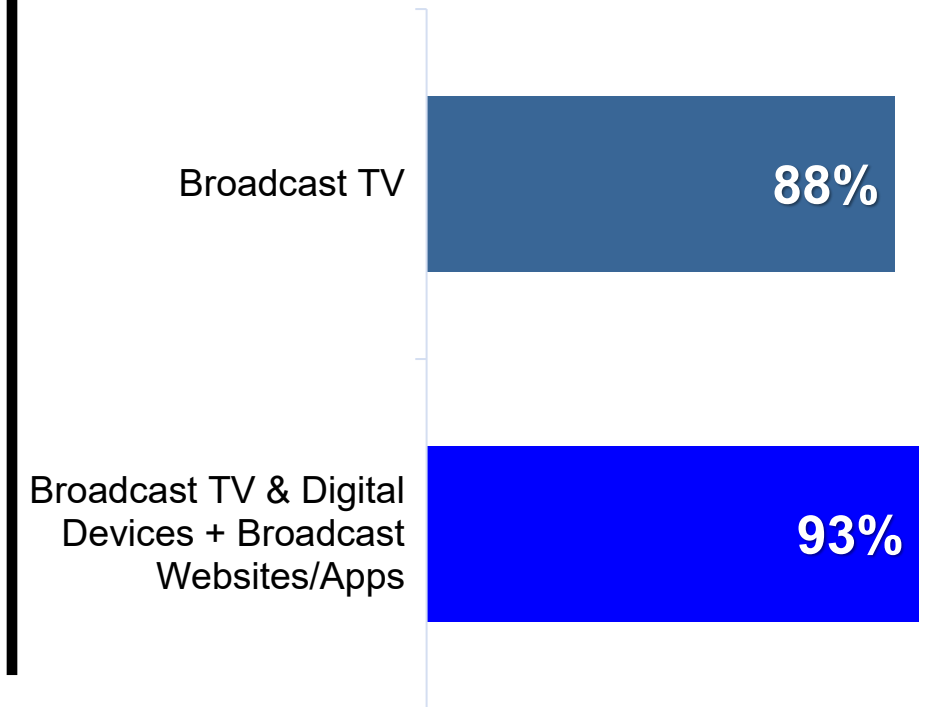
**To be read as:** Broadcast reaches 94% of those that view free ad-supported streaming programs on TV.

# Streaming with NO Advertising: Advertisers Cannot Reach these Viewers But Broadcast Assets Can Reach Almost All of Them

**In-Store + Online Shoppers  
% Reached Yesterday**



**In-Store + Online Shoppers  
% Reach of Streamers with  
No Advertising**



# Key Back-To-School Takeaways

- Back-to-School shoppers are shopping earlier than ever and the NRF predicts expected spending for the season will be near record breaking.
- TV advertising is imperative to influence Back-to-School shoppers.
- 8 out of 10 respondents said television influenced their search selections.
- Broadcast TV delivers top ratings and reach, especially during the summer months.
- Local TV allows advertisers to target their message in a trusted environment.
- Broadcast TV delivers both in-store and online shoppers.
- Online shoppers and in-store shoppers selected television as the most important influence.
- Broadcast TV assets can reach those who stream programming with ads and those who stream on ad-free platforms.

