



# BACK TO SCHOOL 2023

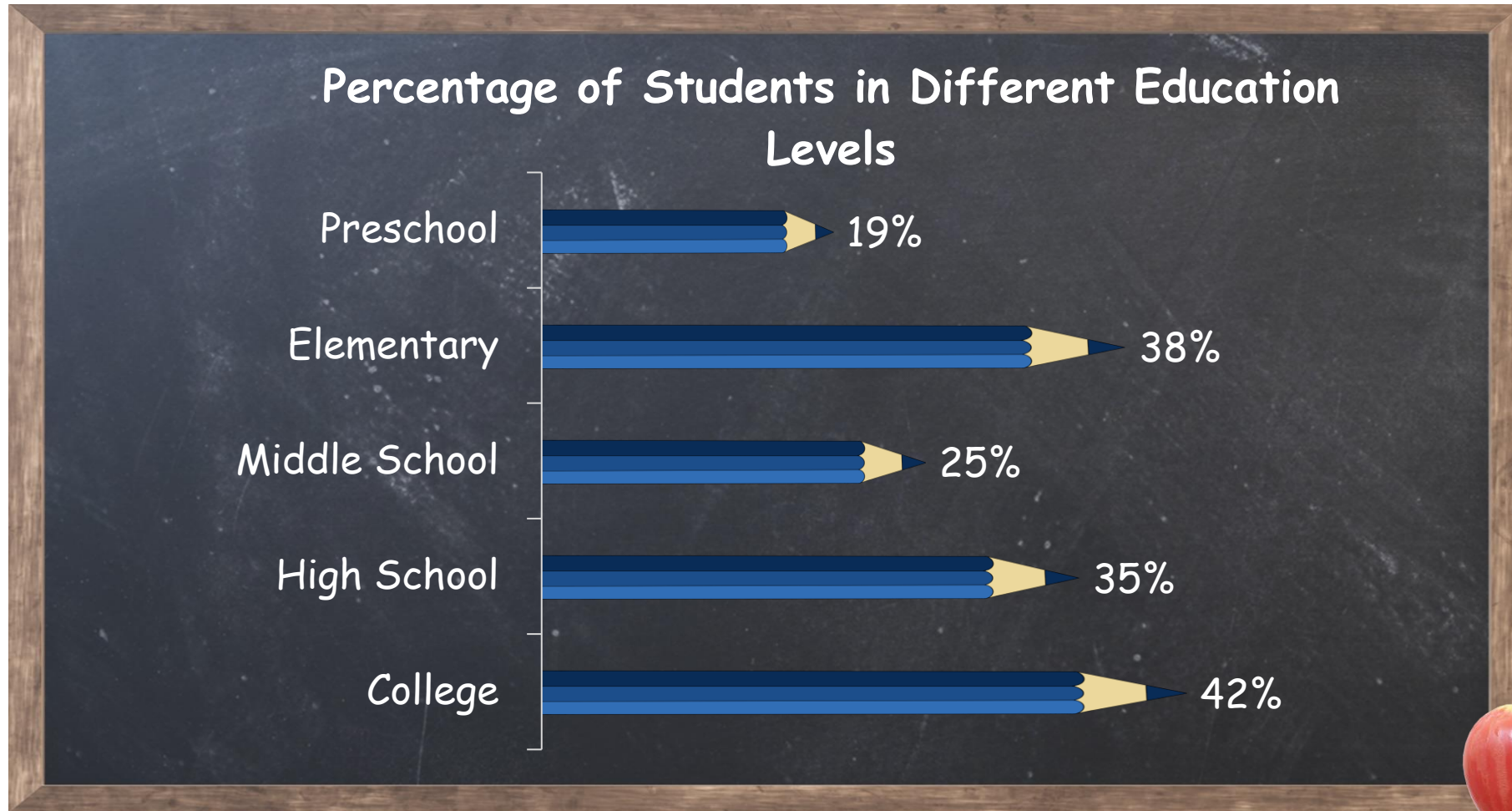


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- Local TV Allows Advertisers to Target their Message in a Trusted Environment ([Slides 30-37](#))
- However Consumers Shop, TV Advertising is Key ([Slides 38-57](#))

# Back-to-Class 2023 Marketing Data/Projections

# There Is A Mix of Education Levels in Households with Students

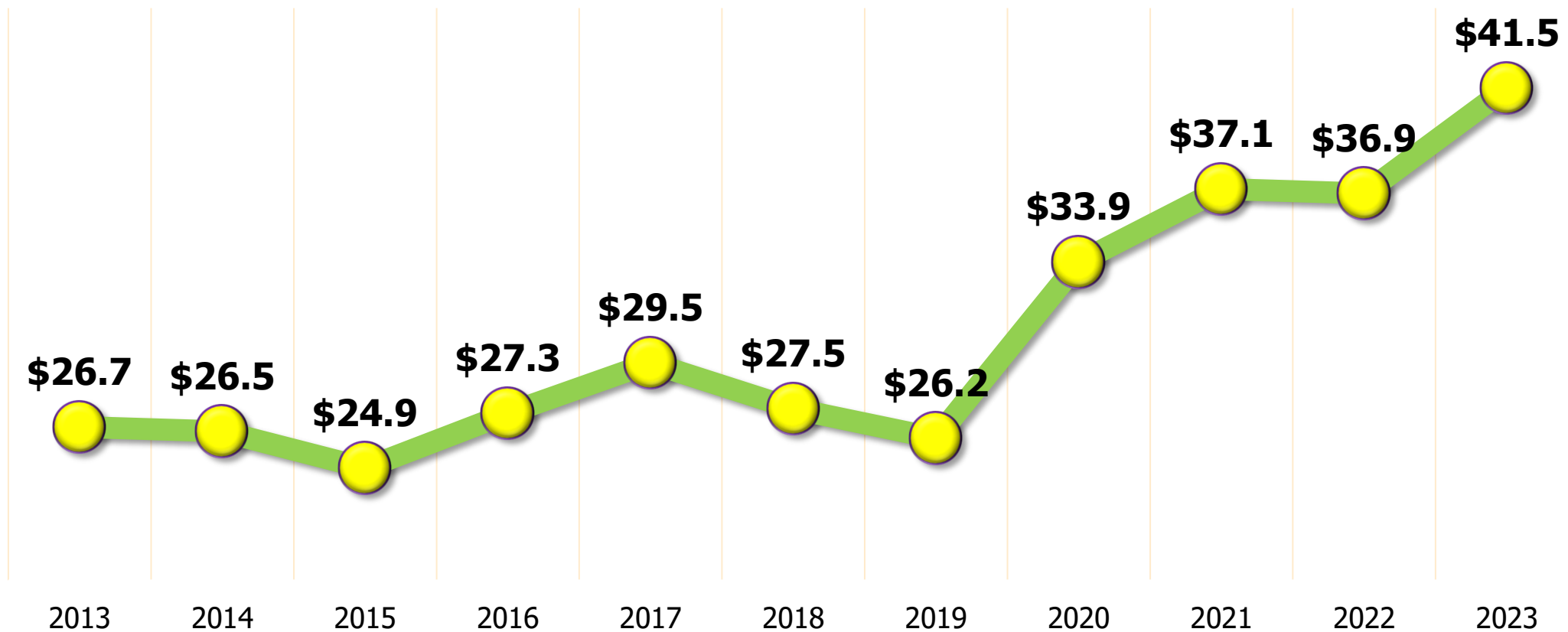


Source: KPMG Consumer Pulse Survey, fielded June 6, 2023–June 13, 2023. “How many children under the age of 18 live in your household?”, “For the upcoming school year (2023-2024), how many of the children (under 18) in your household will be in each of the following academic age groups?”, “How many people in your household are currently enrolled in or starting college this upcoming school year (2023-2024)?”

# Back-To-School

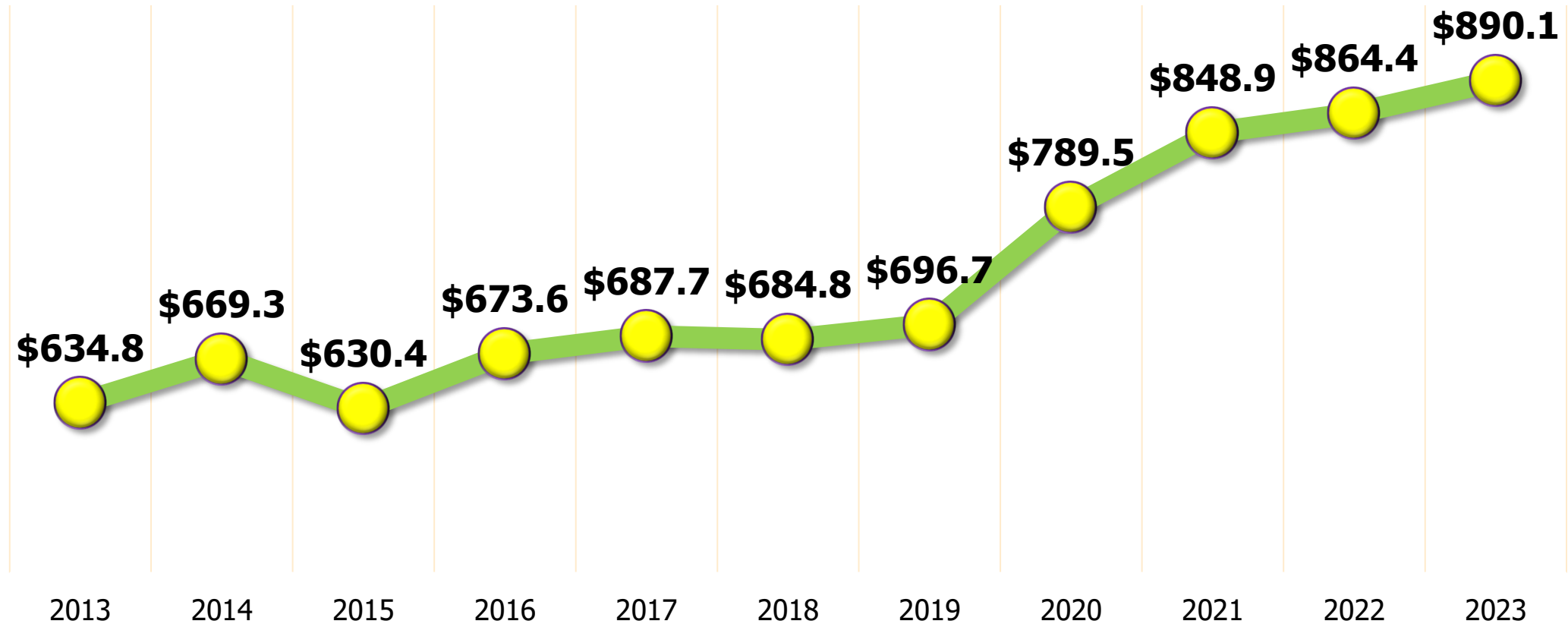
# Back-to-School Spending Is Expected to Be A Record High In 2023

Total Spending In Billions



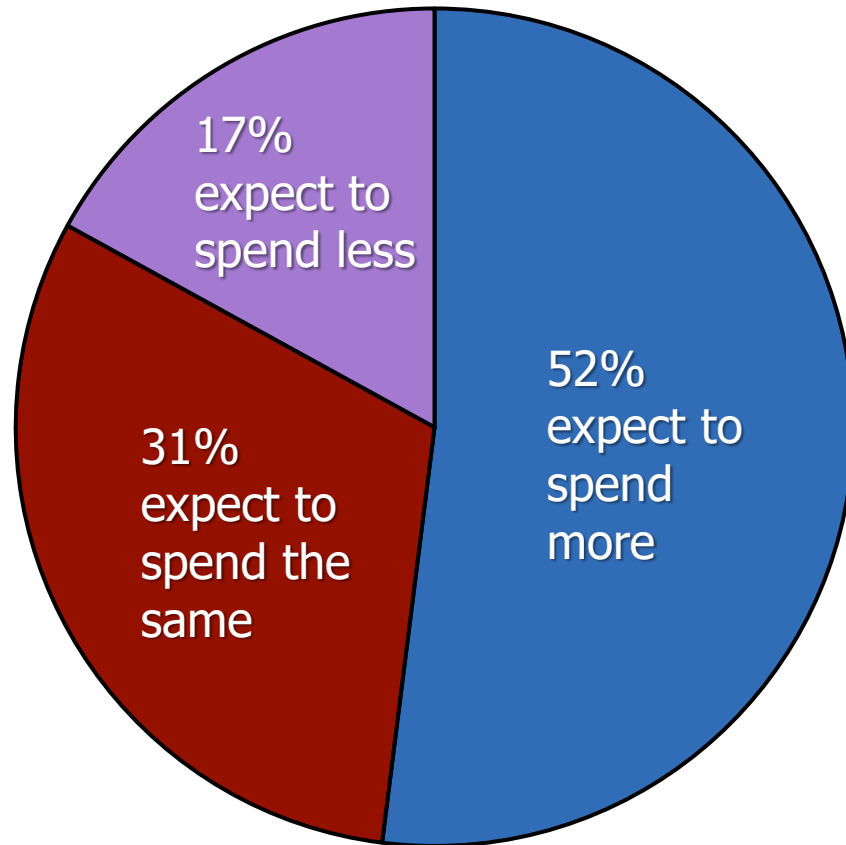
# Per Household Spending Is Expected to Reach An All-Time High In 2023

Total Per Household Average Spending for Back-to-School

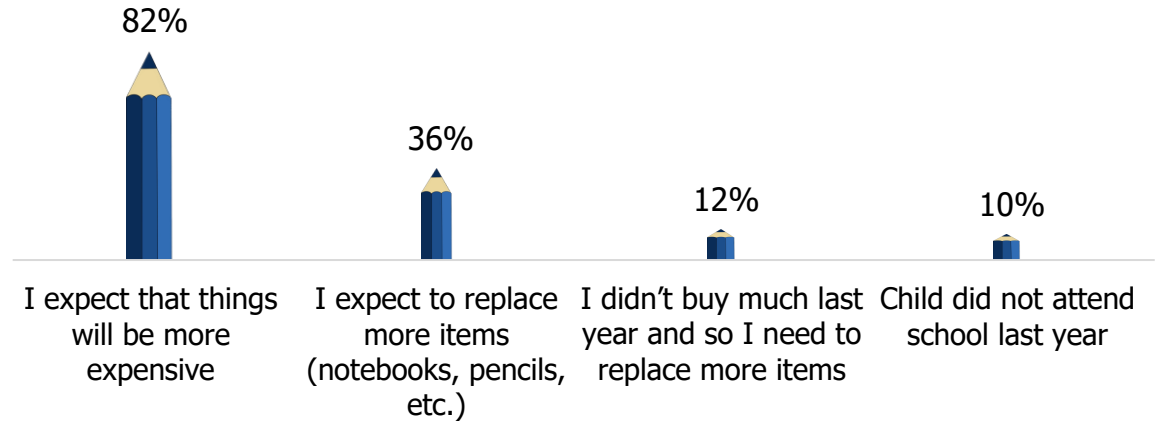


# 52% of Back-to-School Shoppers Plan To Spend More Per Child

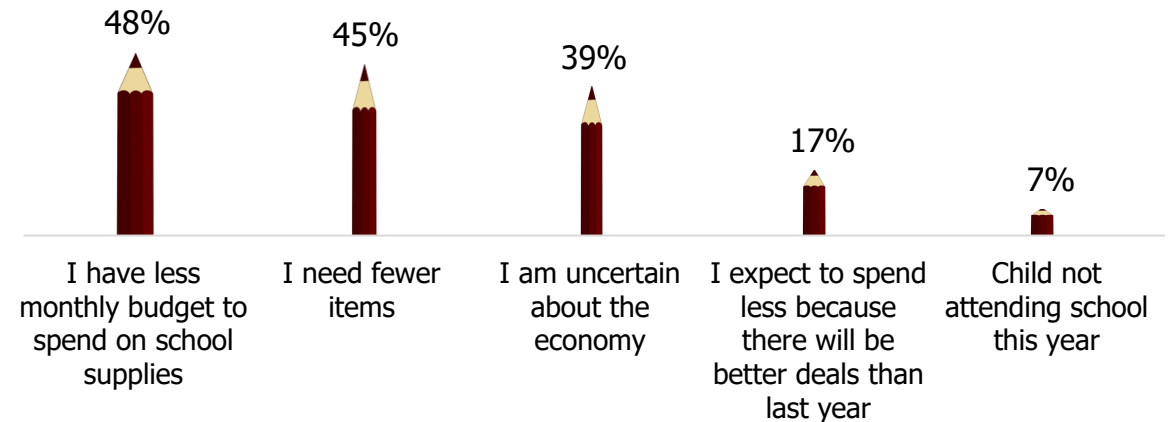
Expected change in spend per child



Reasons for spending more



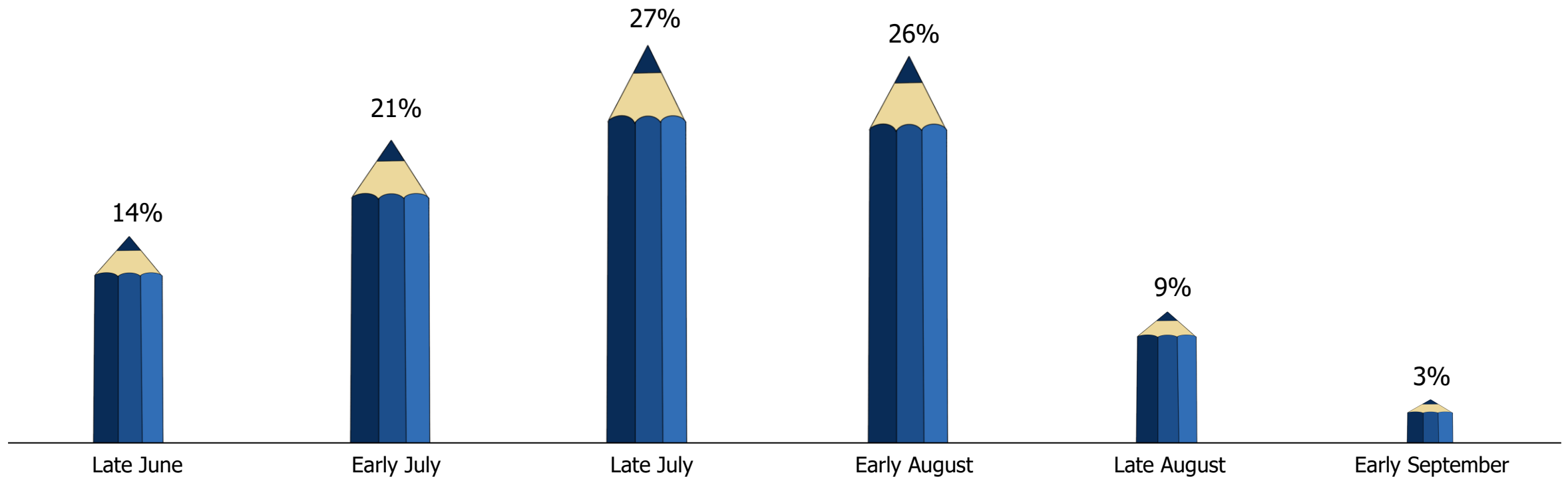
Reasons for spending less



Source: KPMG Consumer Pulse Survey, fielded June 6, 2023–June 13, 2023. "On average, how much did you spend on back-to-school supplies per child in each of the following academic age groups last year (2022)?, On average, how much do you plan on spending on back-to-school supplies per child in each of the following academic age groups this year (2023)? Please include apparel/uniforms spend.", "Why do you plan to spend less per child?", "Why do you plan to spend more per child?"

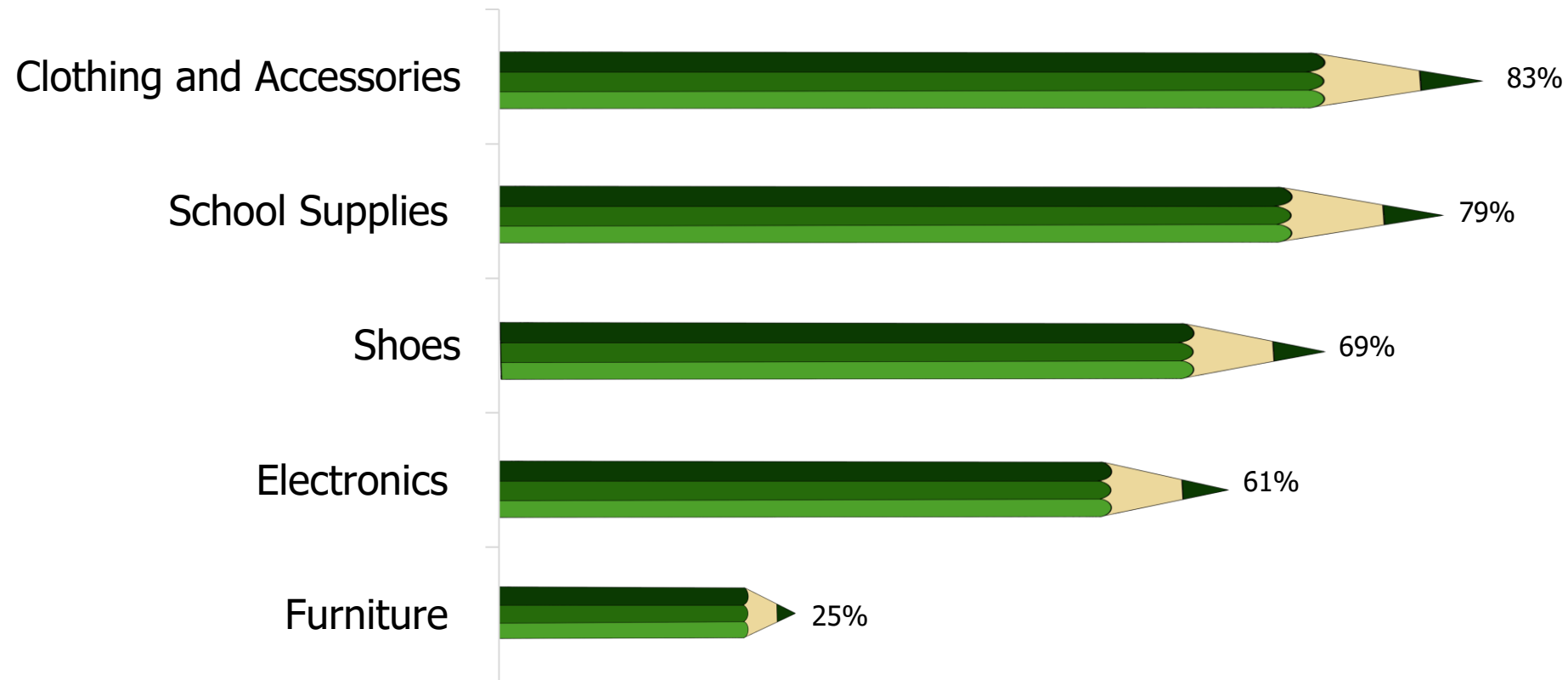


# Most Back-to-School Shopping Happens Late July and Early August



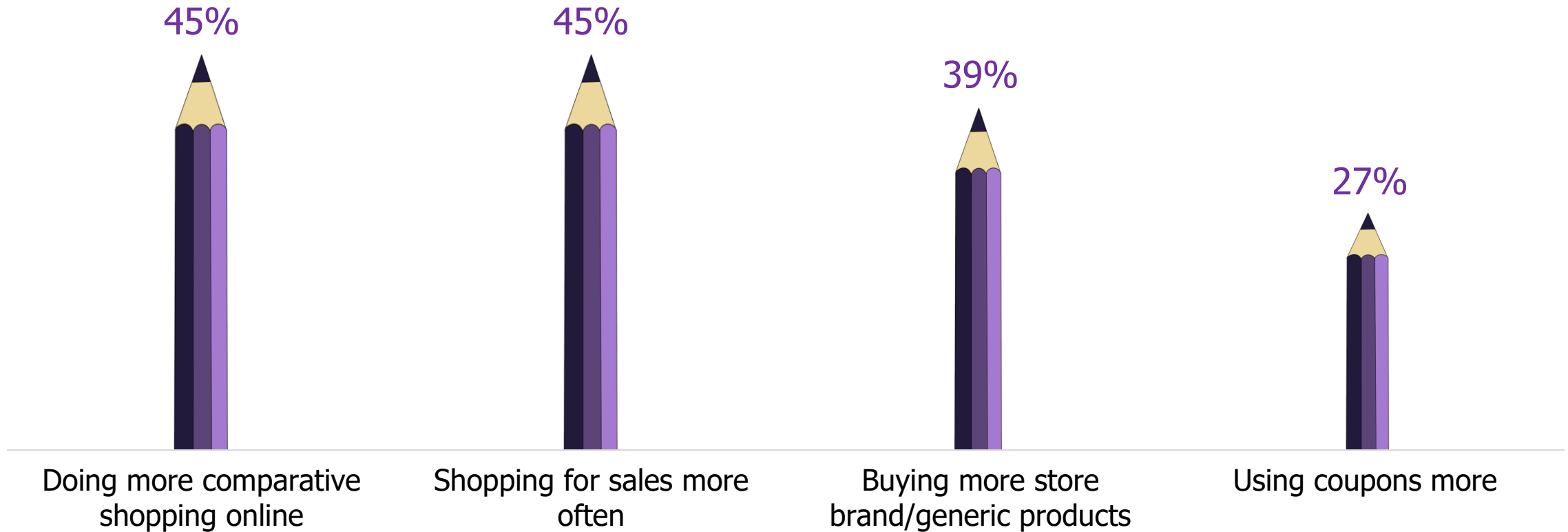
# 83% of Shoppers Expect to See Higher Prices when Back-to-School and Back-to-College Shopping this Year

**For which items do you expect to see higher prices?**



# Back-to-School Shoppers are Implementing Saving-Focused Shopping Behaviors

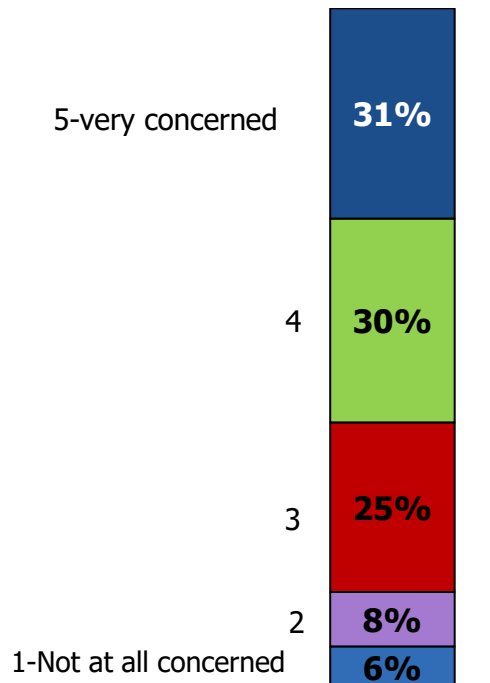
**How will the state of the U.S. economy impact your back-to-class purchases?**



# BTS Shoppers Are Concerned With Inflation, 70% of Whom Will Look Out For Early Discounts To Mitigate Rising Prices.

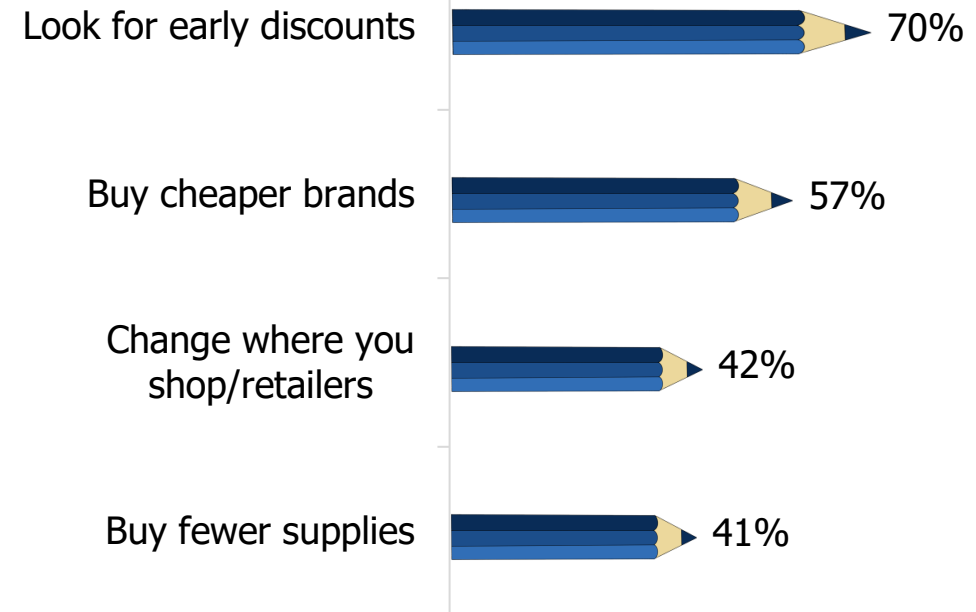
## Levels of Concern with Rising Prices and Actions to Tackle Inflation

### Overall



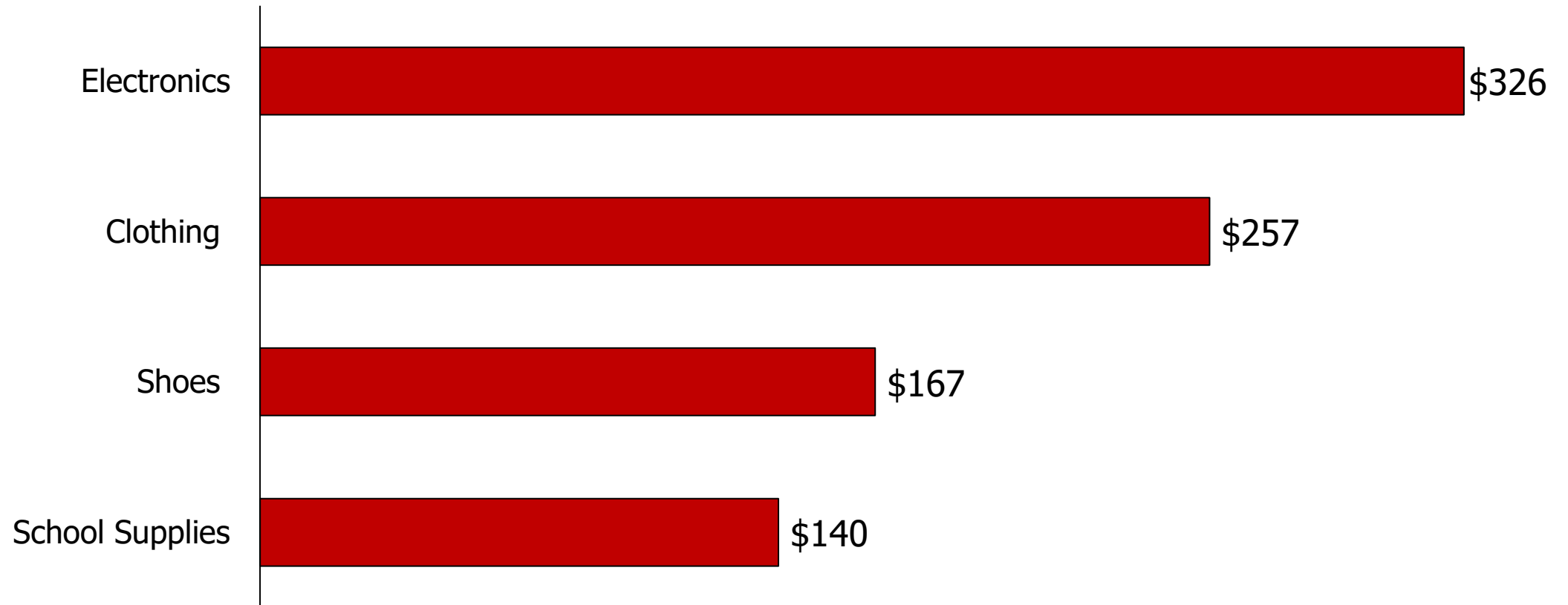
BTS Shoppers

### Actions to tackle inflation (of those concerned)



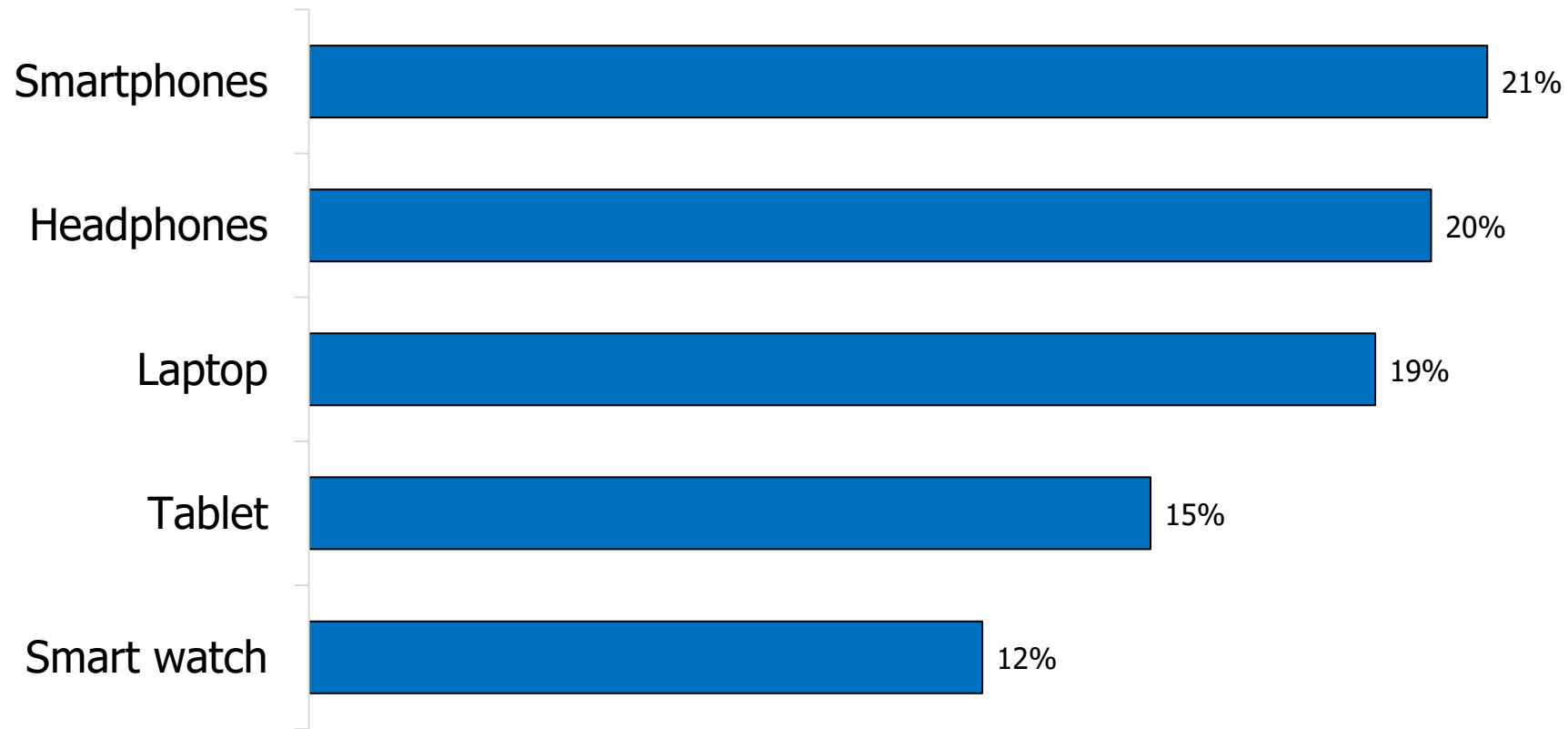
# Back-to-School Households Spend The Most Money On Electronics

## Per Household Spending



# Smartphones, Headphones, and Laptops are The Top Electronics Being Purchased For Children

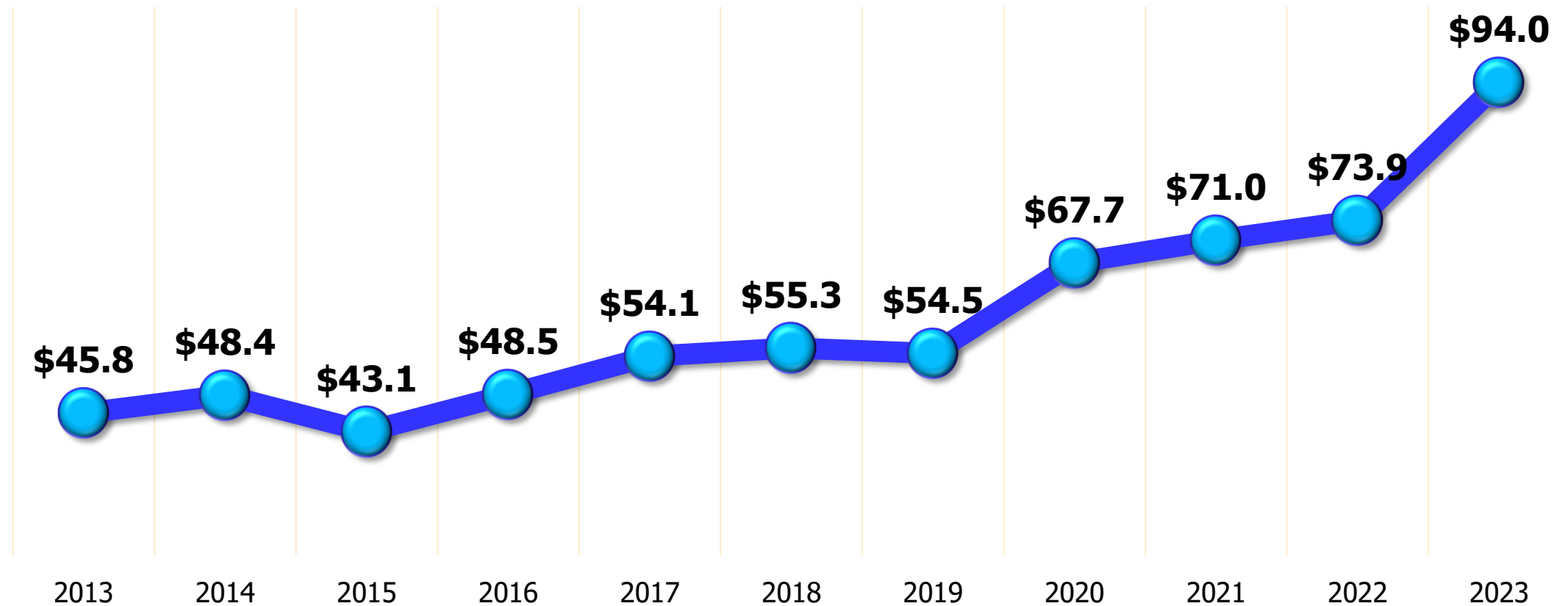
**Which of the following devices do you plan to purchase for your school-aged children in the next 6 months?**



# Back-To-College

# Back-to-College Spending Is Expected to Reach An All Time-High In 2023

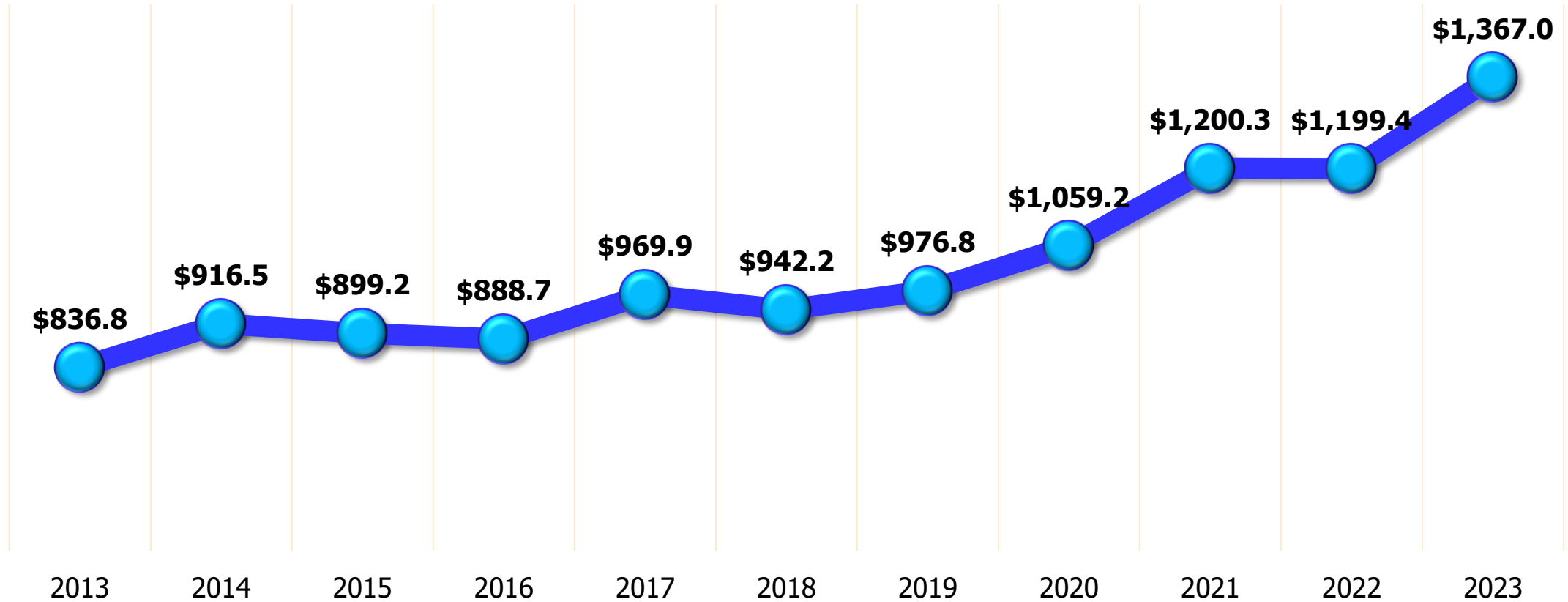
Total Spending In Billions





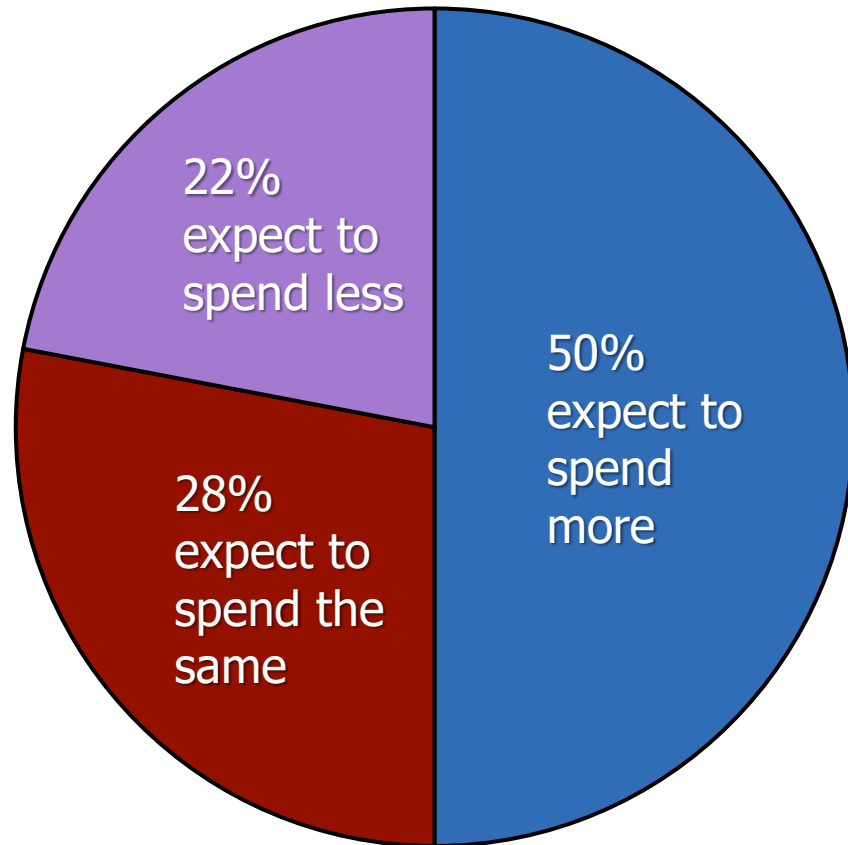
# Per Household Spending For Back-To-College Is Expected to Be Record High In 2023

Total Per Household Average Spending for Back-to-College

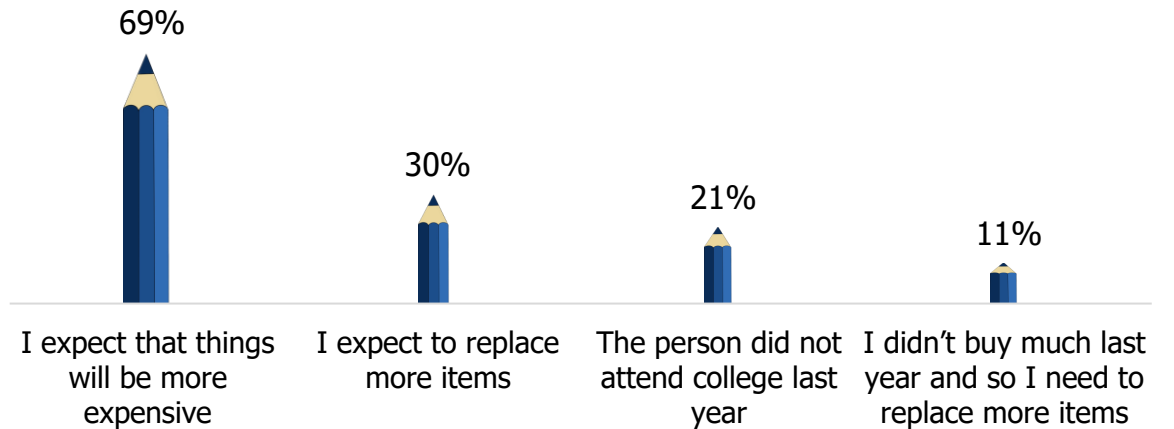


# 50% of Back-to-College Shoppers Plan To Spend More Per Student

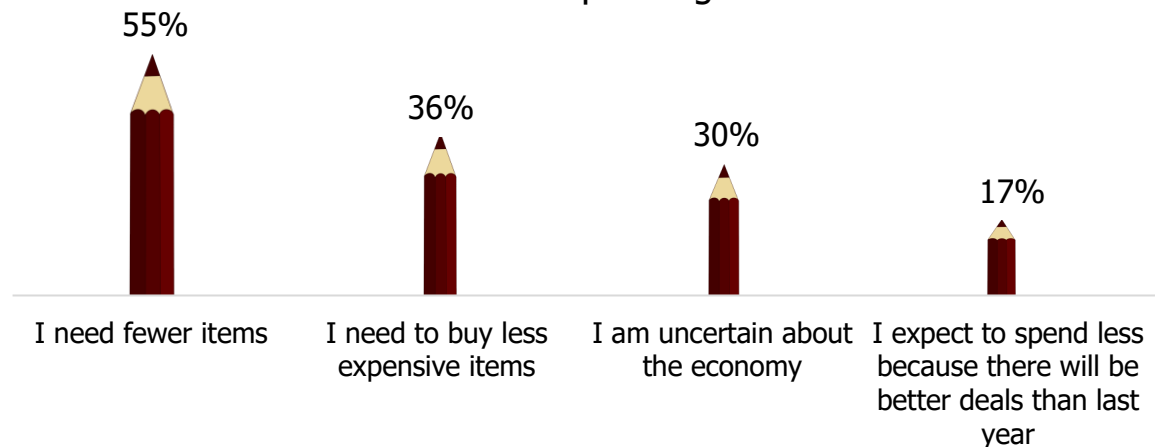
Expected change in spend per college student



Reasons for spending more



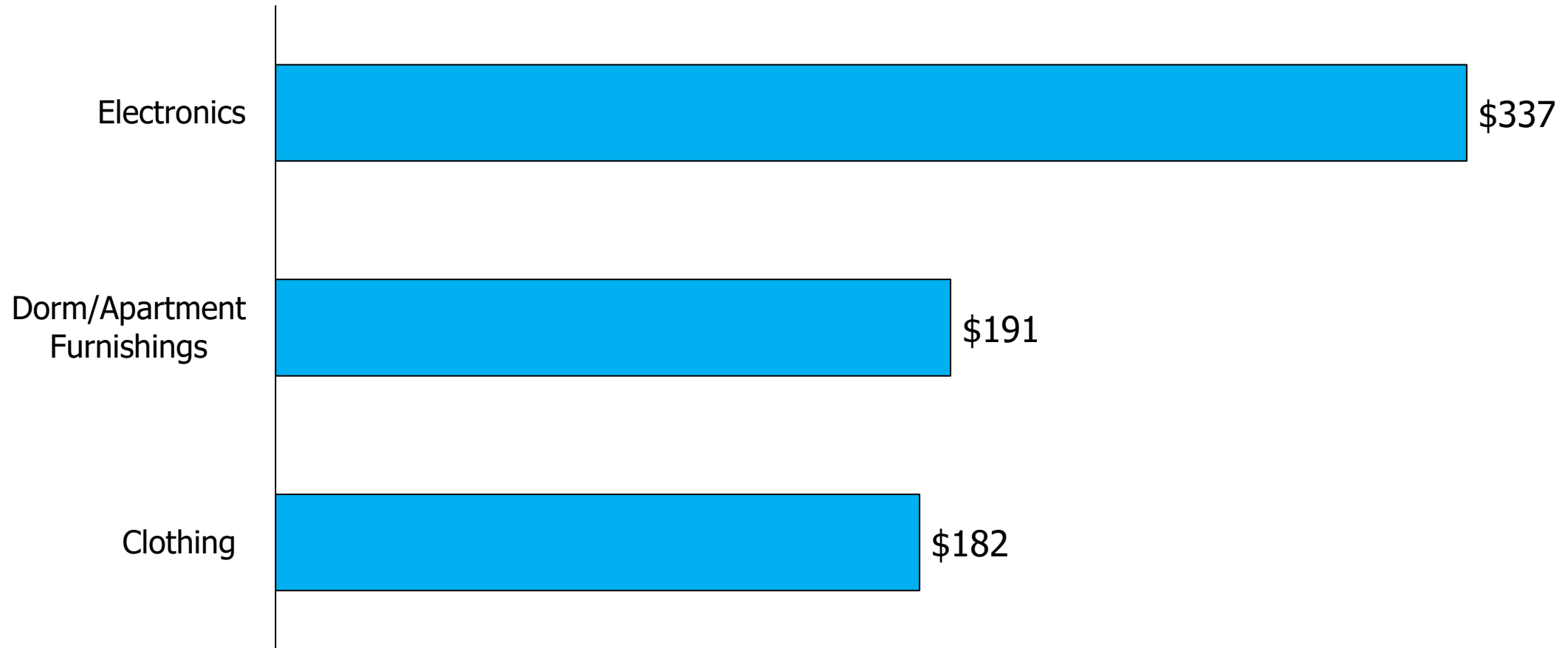
Reasons for spending less



Source: KPMG Consumer Pulse Survey, fielded June 6, 2023–June 13, 2023. "You indicated that you have at least one college student in your household. On average, how much did you spend on back-to-school supplies per college student last year (2022)?, On average, how much do you plan on spending on back-to-school supplies per college student this year (2023)? Please include apparel/uniforms, footwear and dorm furnishings.", "Why do you plan to spend less per college student?", "Why do you plan to spend more per college student?"

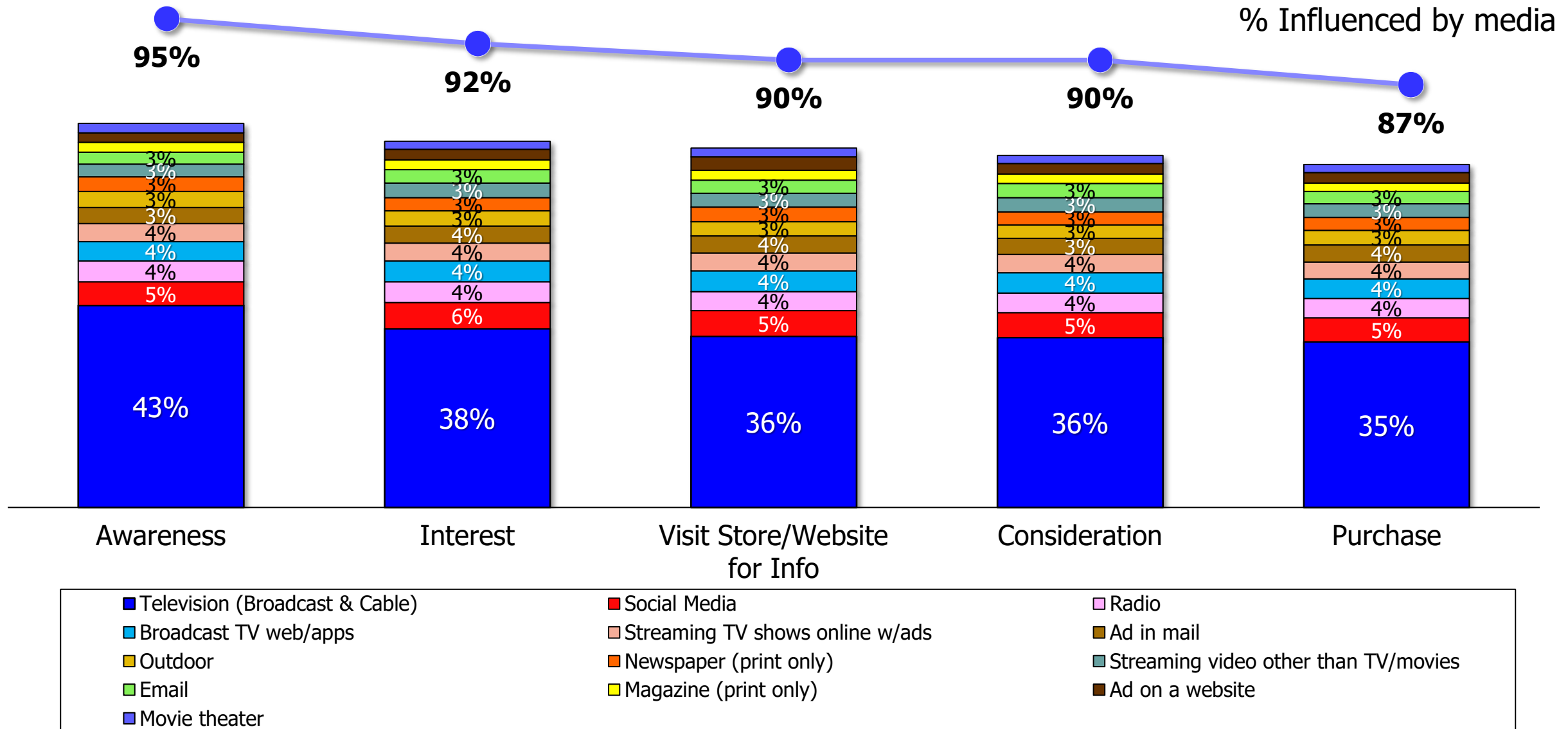
# The Top Categories for Back-to-College Shopping are...

## Per Household Spending



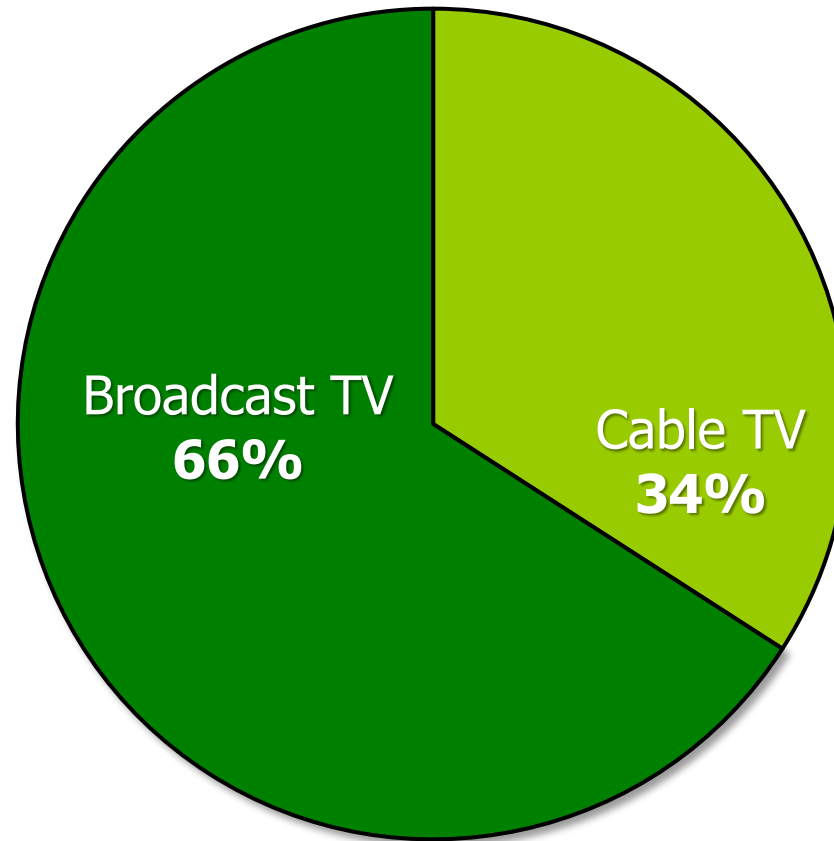
# TV Advertising Is Imperative To Influence Back-To-Class Shoppers

# What Influenced Consumers Most: Television



# Of Those that Cited TV as the Most Important in Awareness Phase, Two-Thirds Picked Broadcast TV

All 8 Categories:



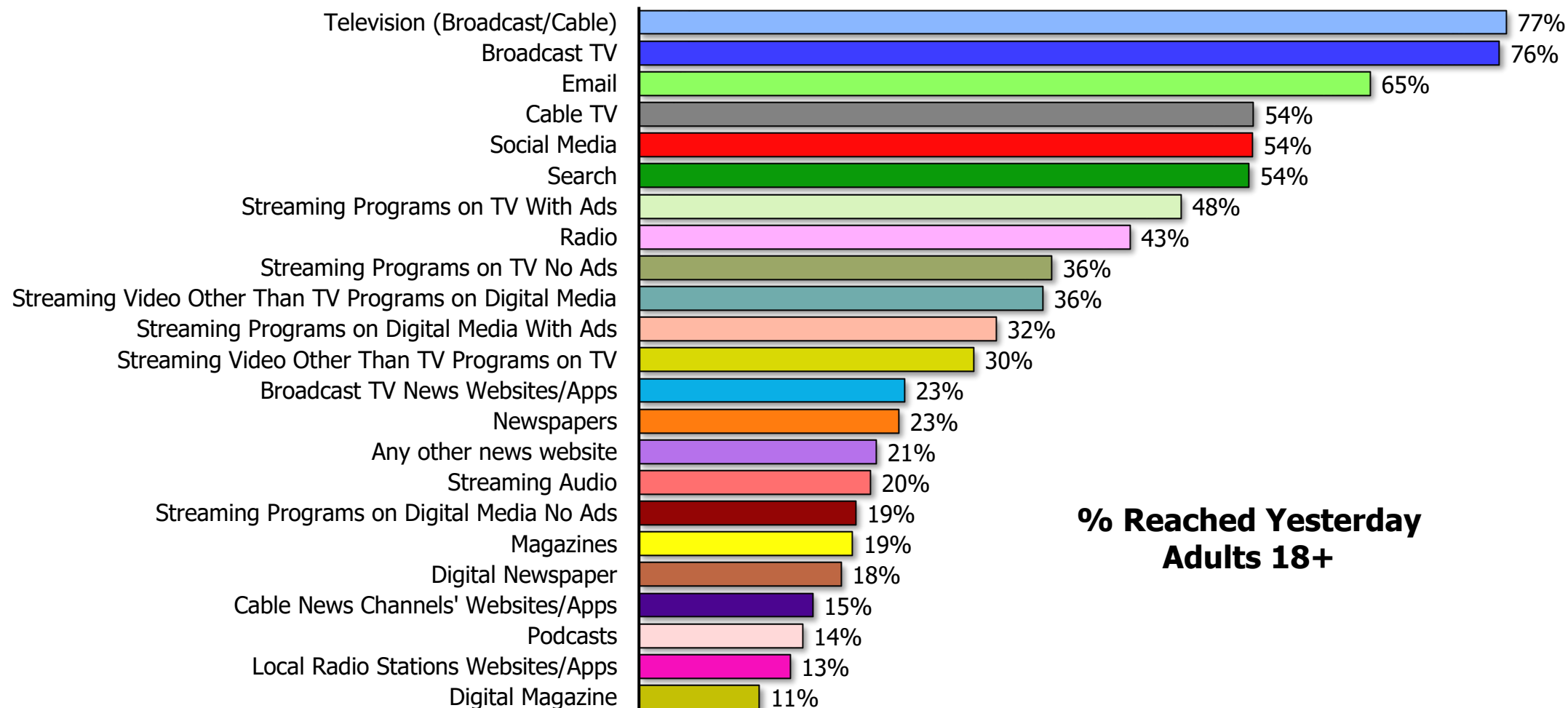
Source: GfK TVB Purchase Funnel 2023 A18+

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 49% who chose television, 66% chose broadcast TV

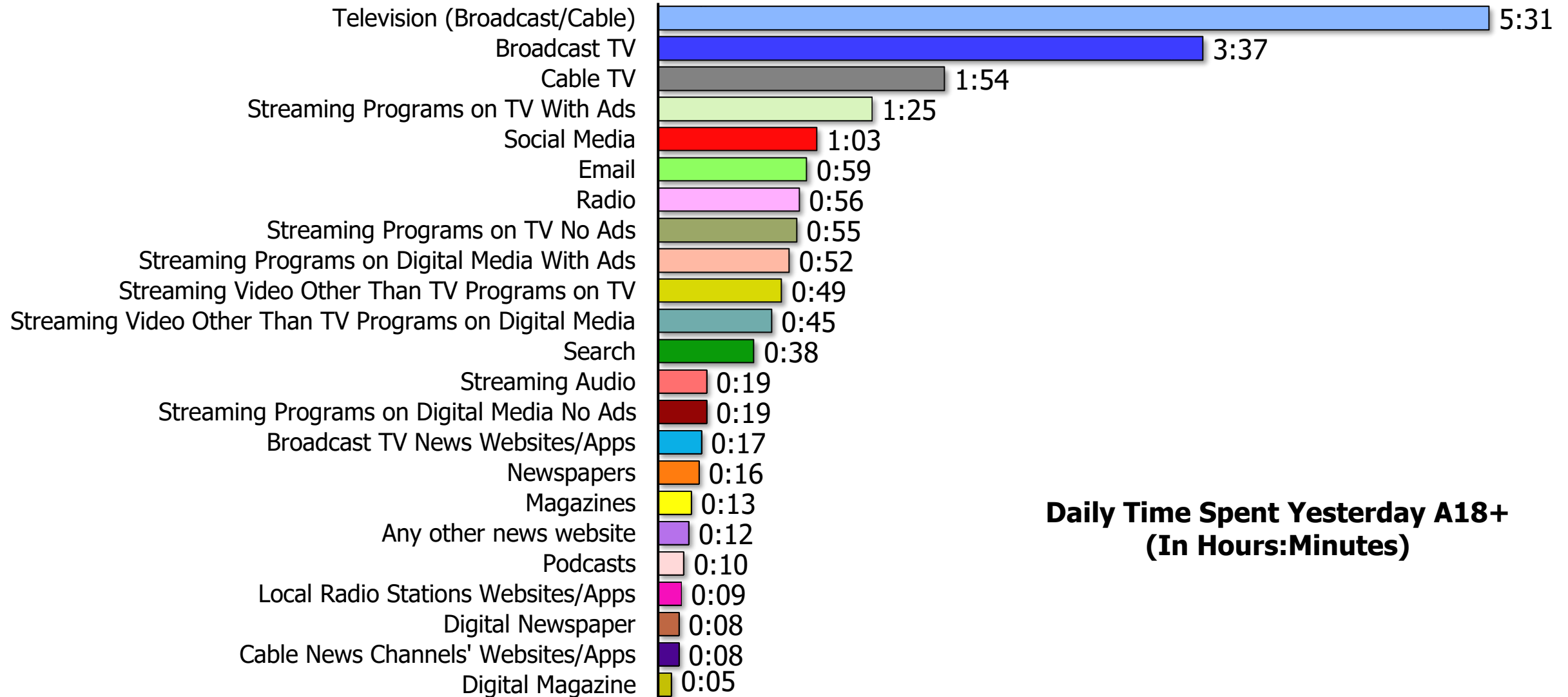
# TV Has Highest Reach of Platforms

## Broadcast Leads the Way



Source: GfK TVB Media Comparisons Study 2023. M-S 4A-2A. Persons 18+. Online/internet platforms such as email, social media, internet radio and websites, are totaled for any online device-PC, Smartphone and Tablets. Broadcast TV News Websites/Apps includes local TV station & network websites/apps for news/weather/sports.

# People Spend the Most Time with Television

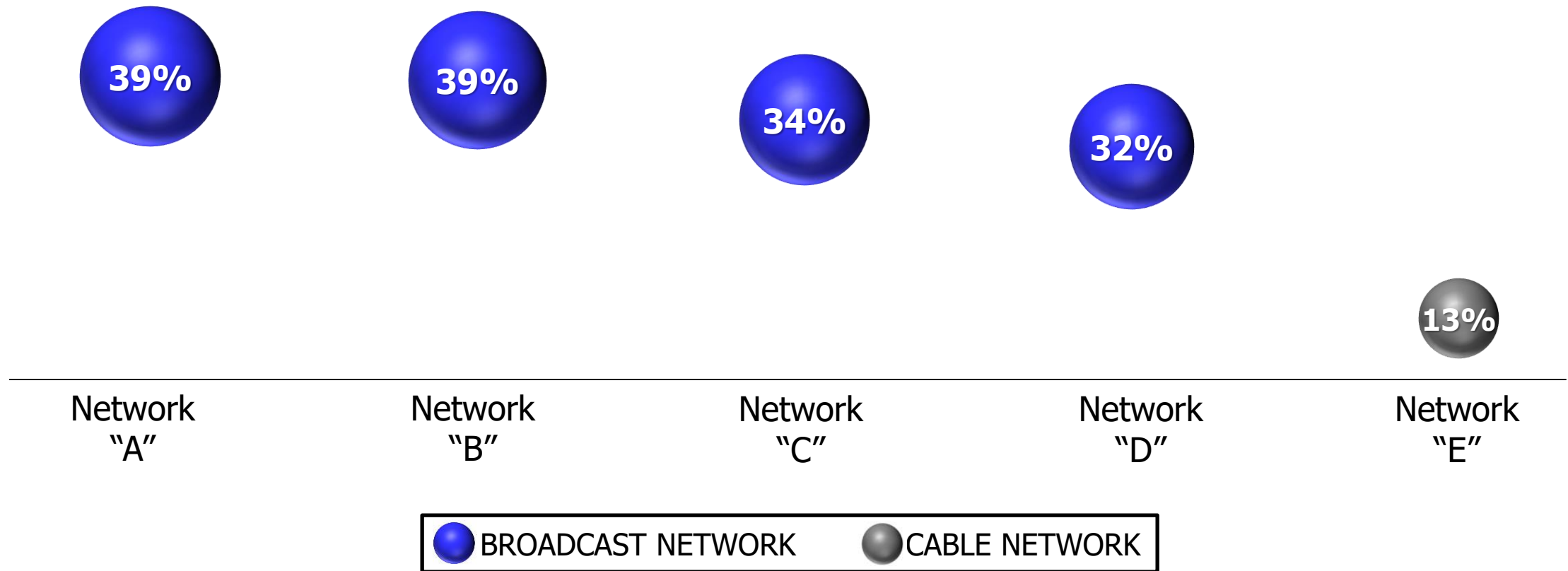




# Out of 5 choices, the top 4 were Broadcast Networks

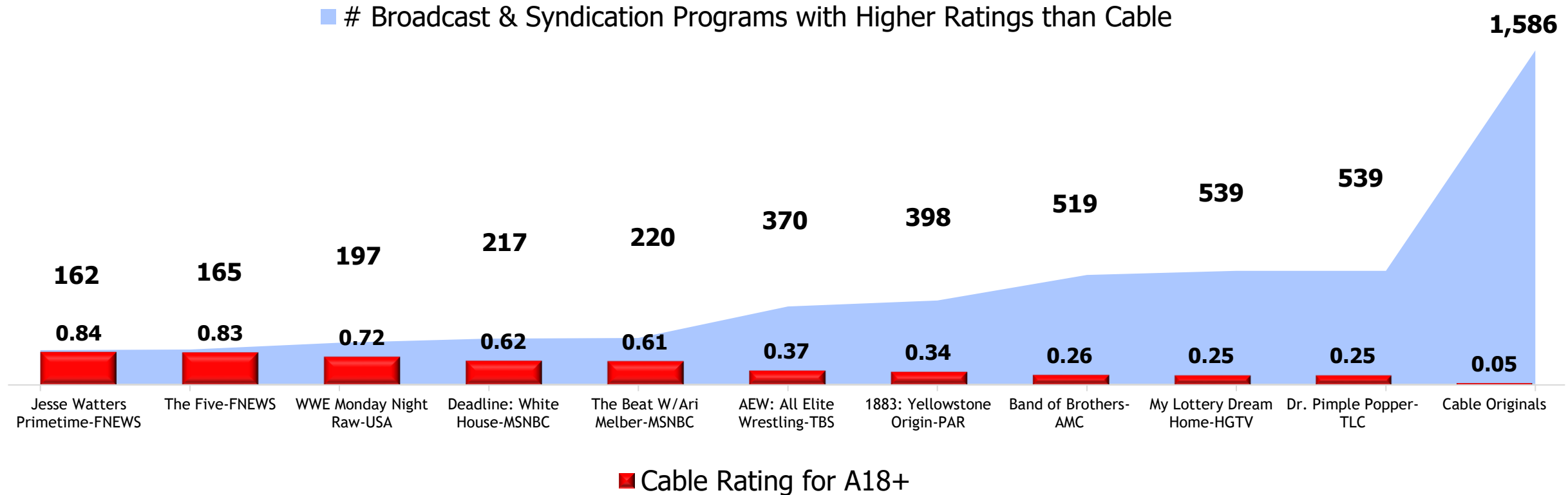
If you could choose only **five** networks, which five would you choose?

Adults 18+  
% Choose Network



Source: GfK TVB Media Comparisons Study 2023. QTV4 – "Now think about all the television networks you watch, either regularly or occasionally. If you could choose only five networks, which five would you choose?" Respondents were given 50 choices of Broadcast and Cable Networks with an option to write in a network.

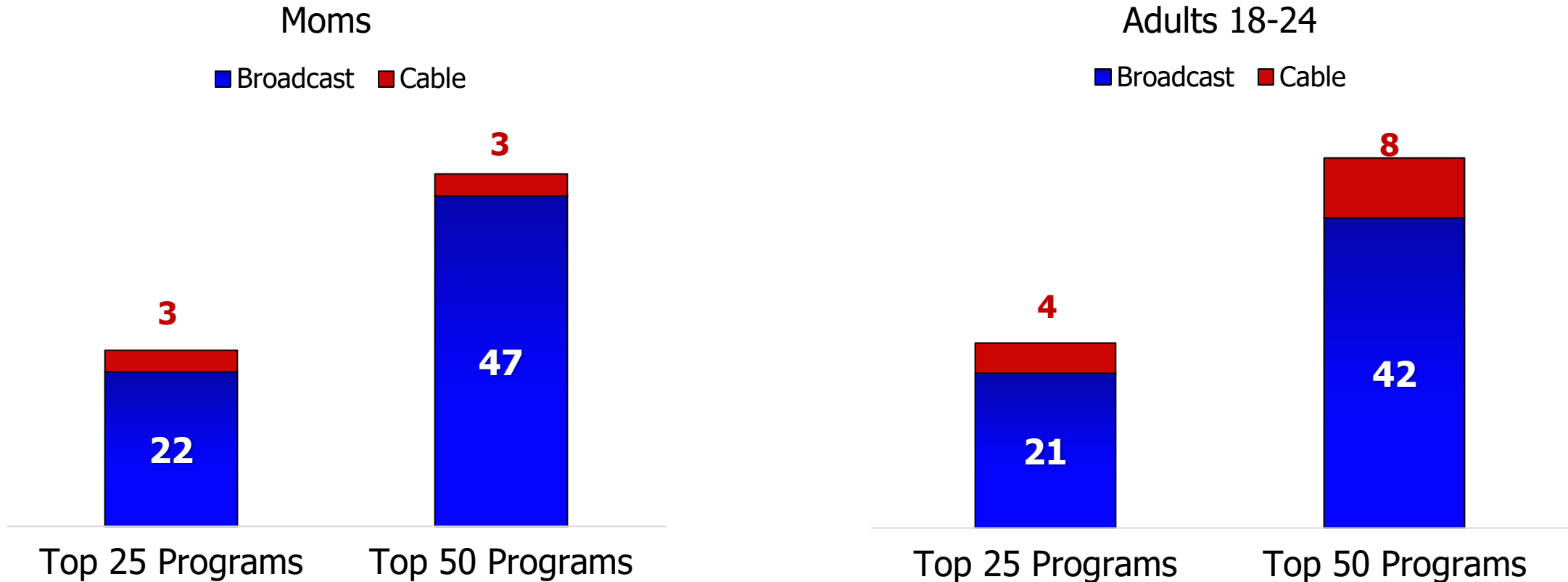
# Broadcast Programs During the Summer Far Outstrip Even Cable Originals



To be read: Fox News Channel's "Jesse Watters Primetime" had a 0.84 average A18+ rating in June 2023. During the same time period, there were 162 Broadcast & Syndication programs that had higher average ratings.

# Broadcast TV: Tops in Summer Ratings

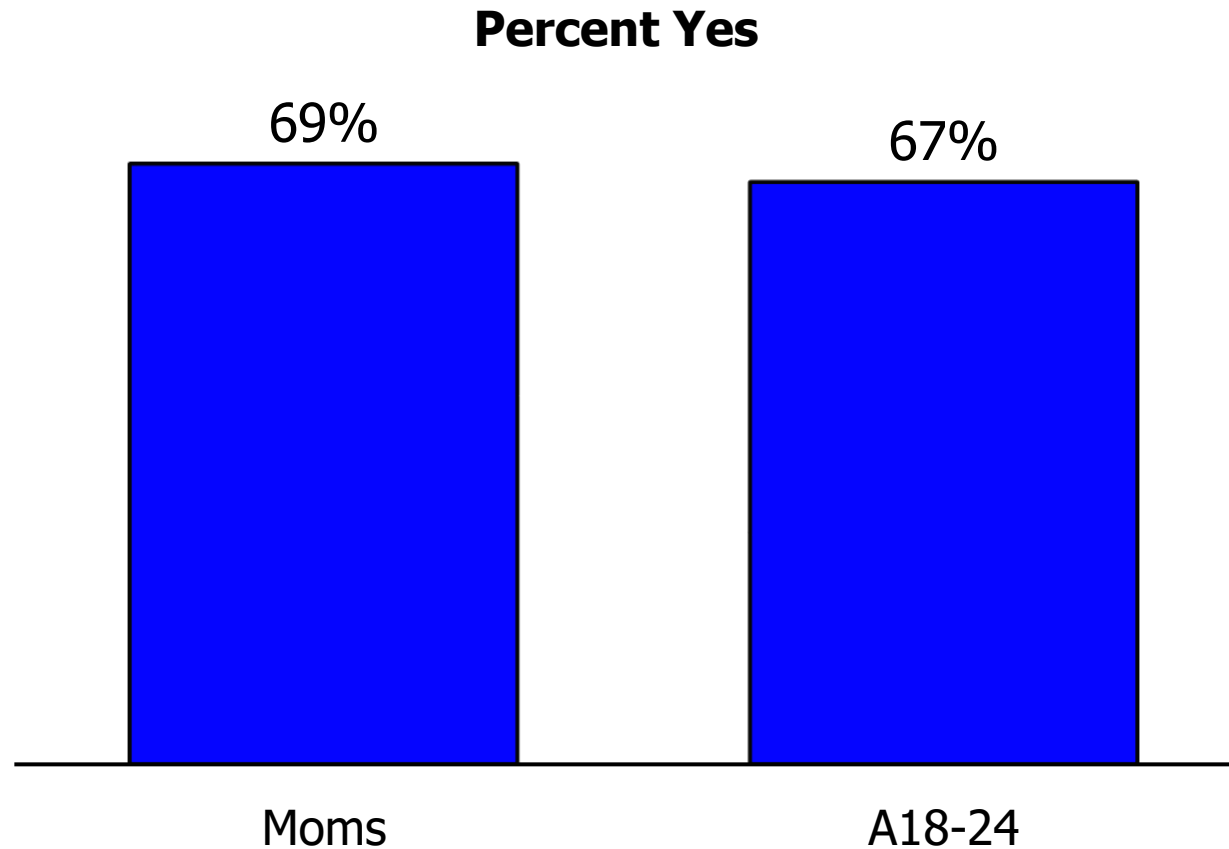
# Of Top-Rated Programs



**Broadcast delivered 47 of the top 50 programs for Moms  
and 42 of the top 50 for A18-24**

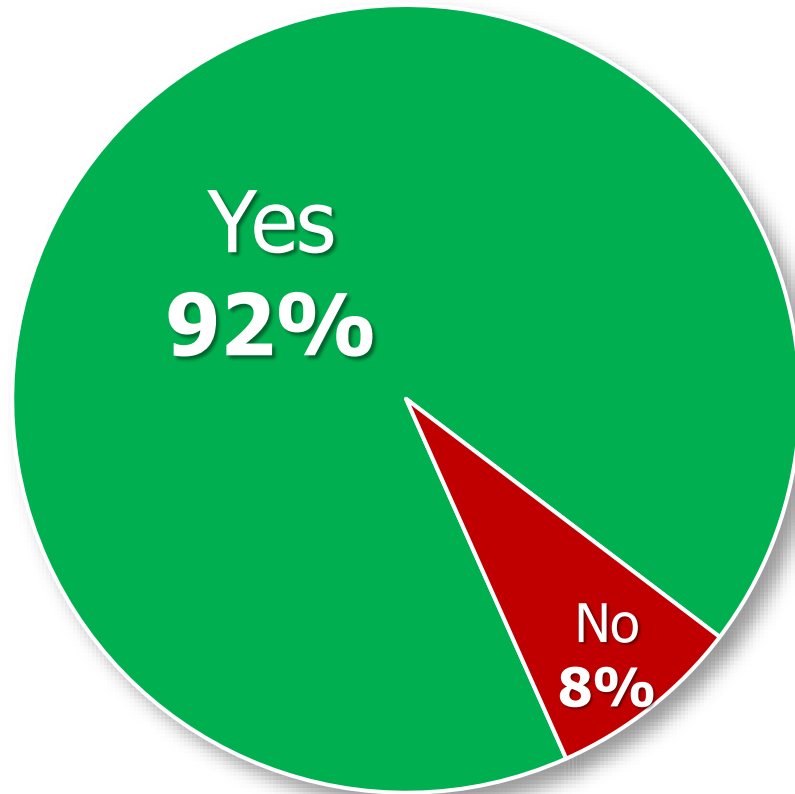
# For Moms and A18-24, Television Ads Are Motivation To Do Further Research Online

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

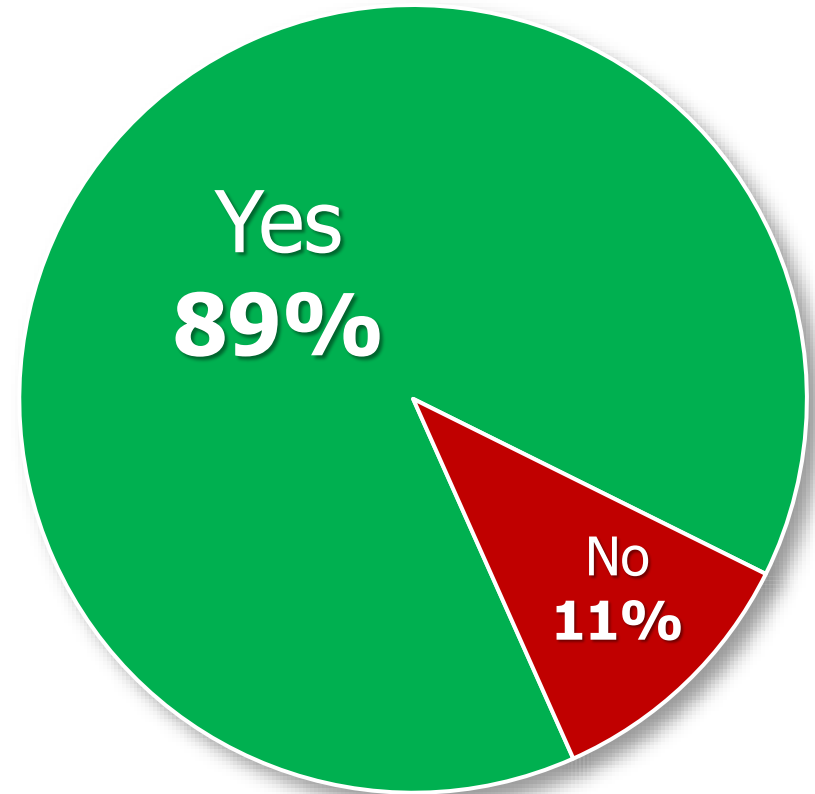


# "Have TV ads influenced your search selections?"

**% Moms**



**% A18-24**



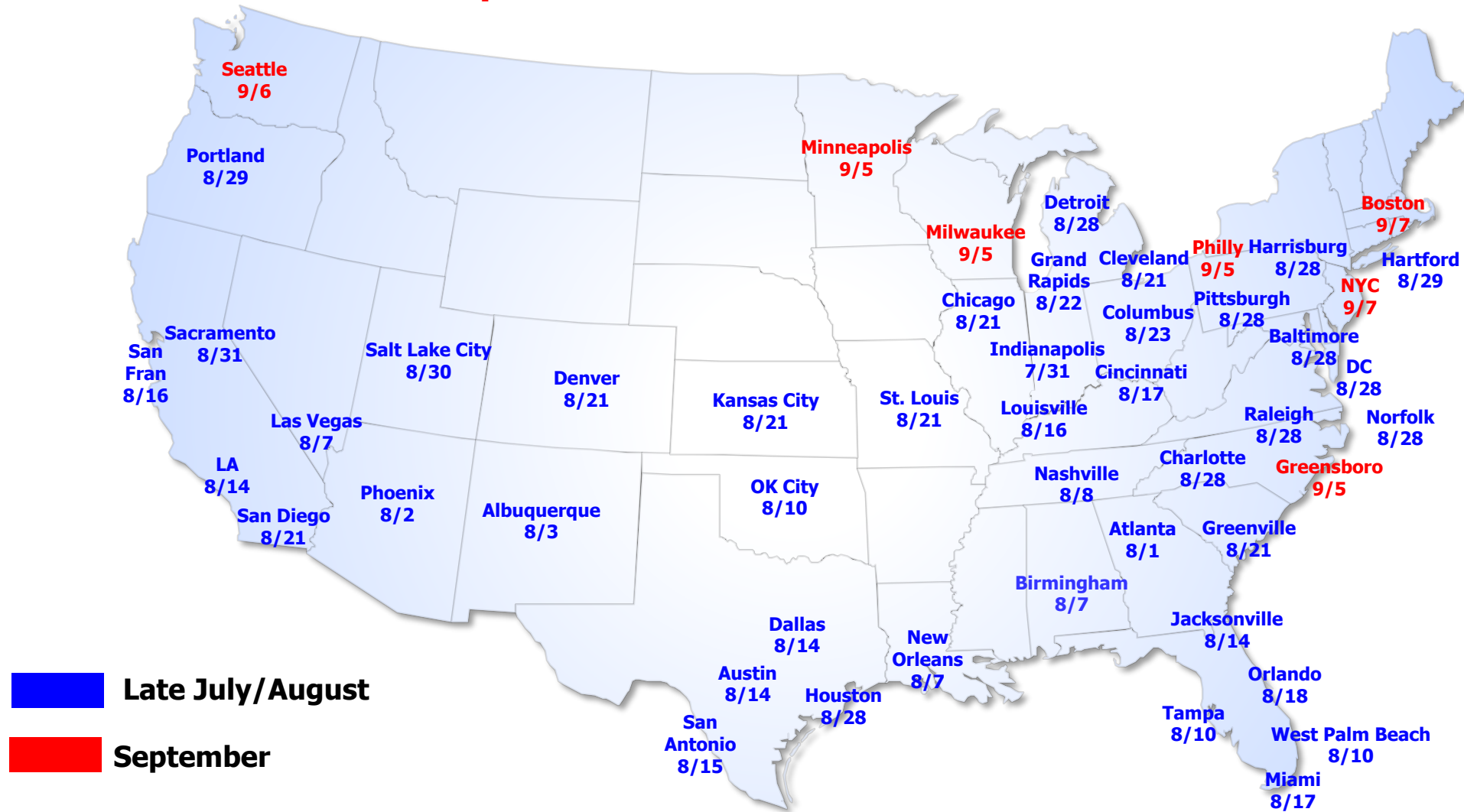
Source: GfK TVB Purchase Funnel 2023 Moms (Women 18+ parent/legal guardian). A18-24 (n=860)

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

# Local TV Allows Advertisers to Target their Message in a Trusted Environment

# School Start Dates Vary from City to City

## Top 50 DMAs: 20 Different Start Dates



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

	Lead By a month	Earliest Start Date	Latest Start Date
	7/1	7/31	9/7
National Media	No Geographic Flexibility		

## ***Local Broadcast***

Boston



Portland



Dallas



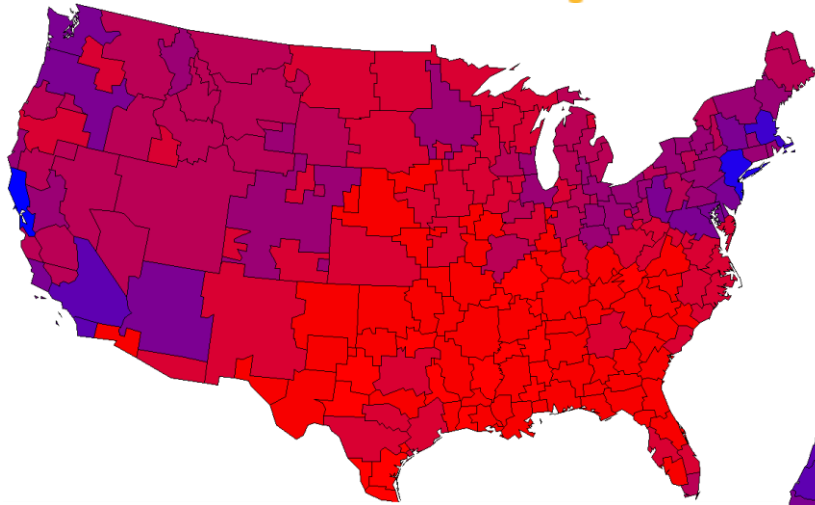
Indianapolis



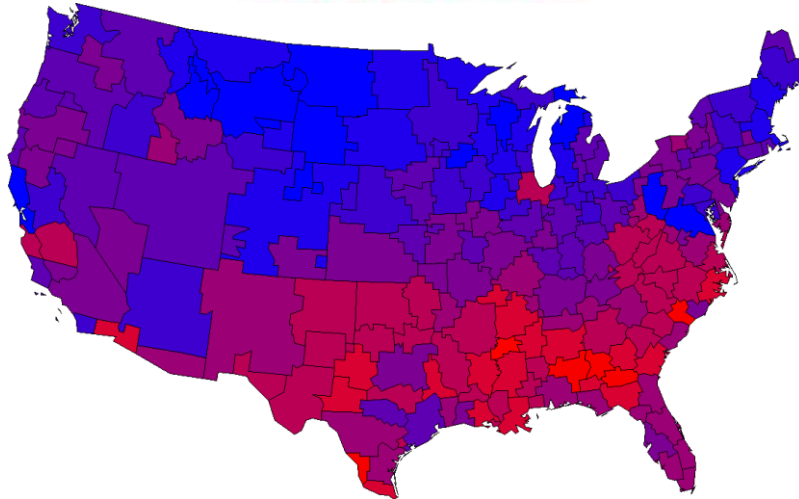


# Cover Each Company's Strong Markets with Local Broadcast

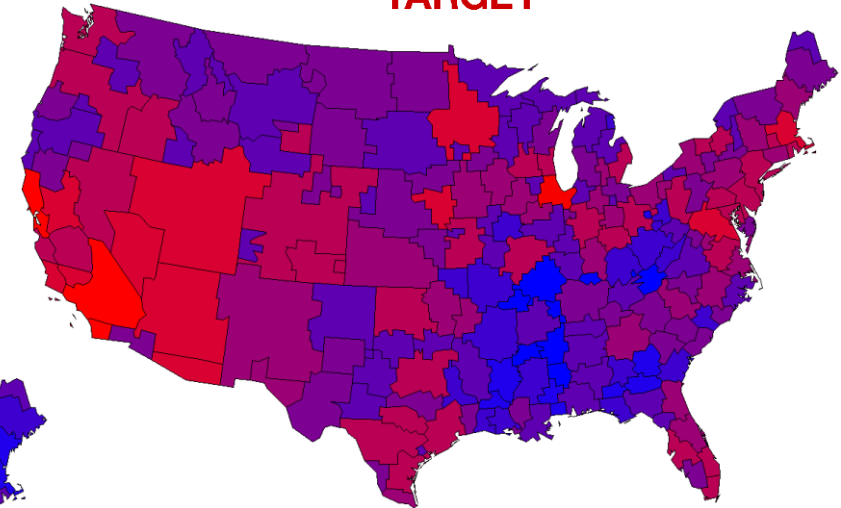
Walmart 



  
DOLLAR TREE

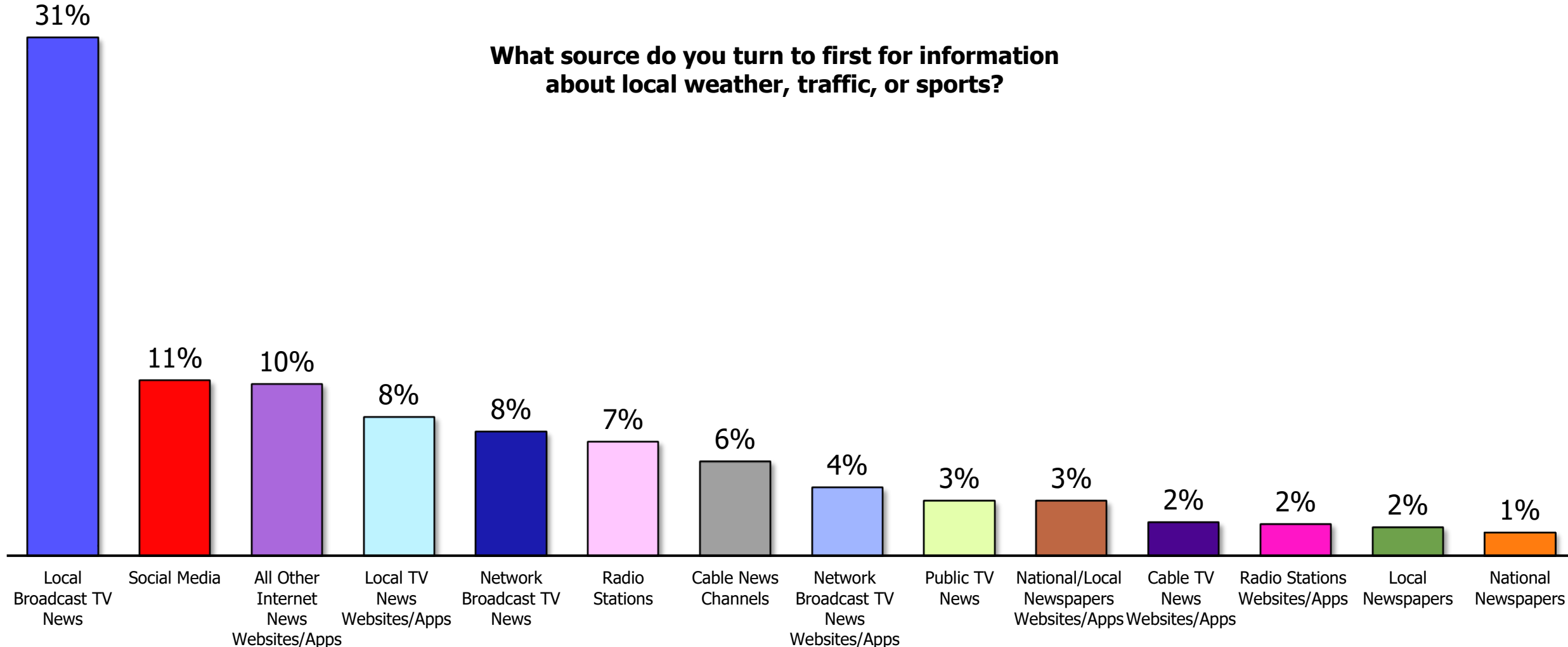


TARGET



 The Redder the better- High Index

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

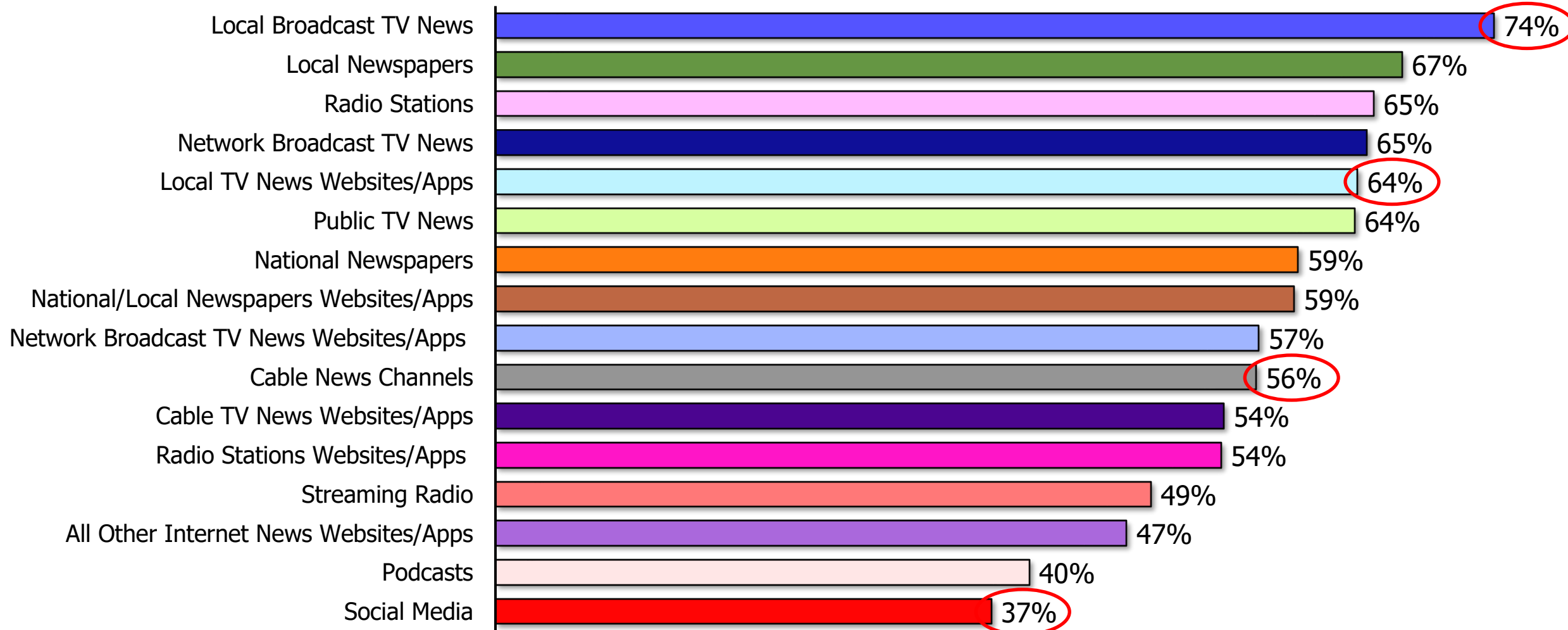


Source: GfK TVB Media Comparisons Study 2023. Persons 18+. Includes only those who chose a media.

Q06 - What source do you turn to first for information about local weather, traffic, or sports? Streaming Radio & Podcasts were under 1% each.

# Local Broadcast Television News: #1 For Trust

I trust the News that I see/hear on this media source:  
Percent Agree

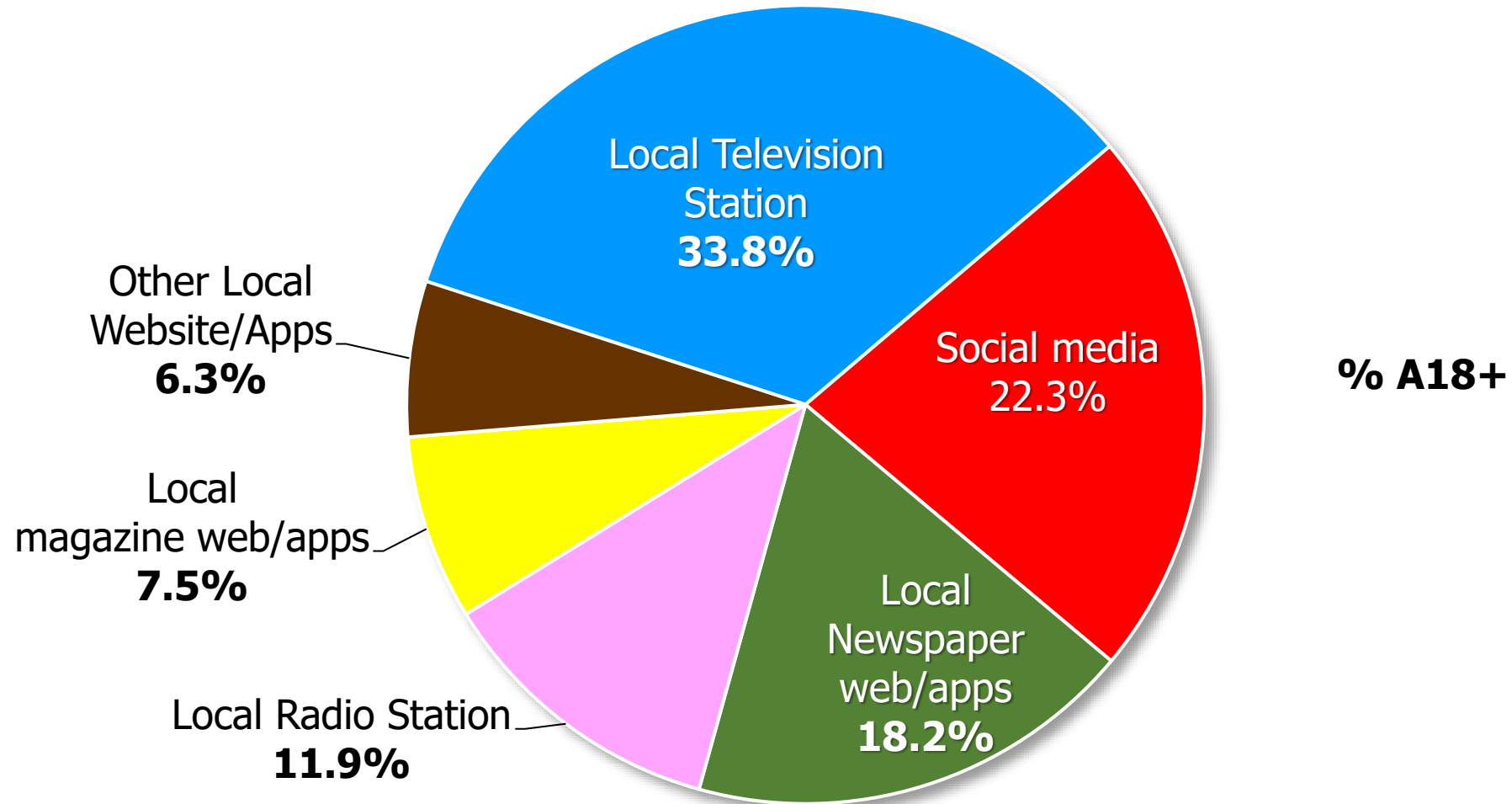


Source: GfK TVB Media Comparisons Study 2023. Persons 18+. Agree Strongly or Agree Somewhat.

Q09 - For each source, please indicate the extent to which you agree or disagree with the following statement: I trust the News that I see/hear on this media source.

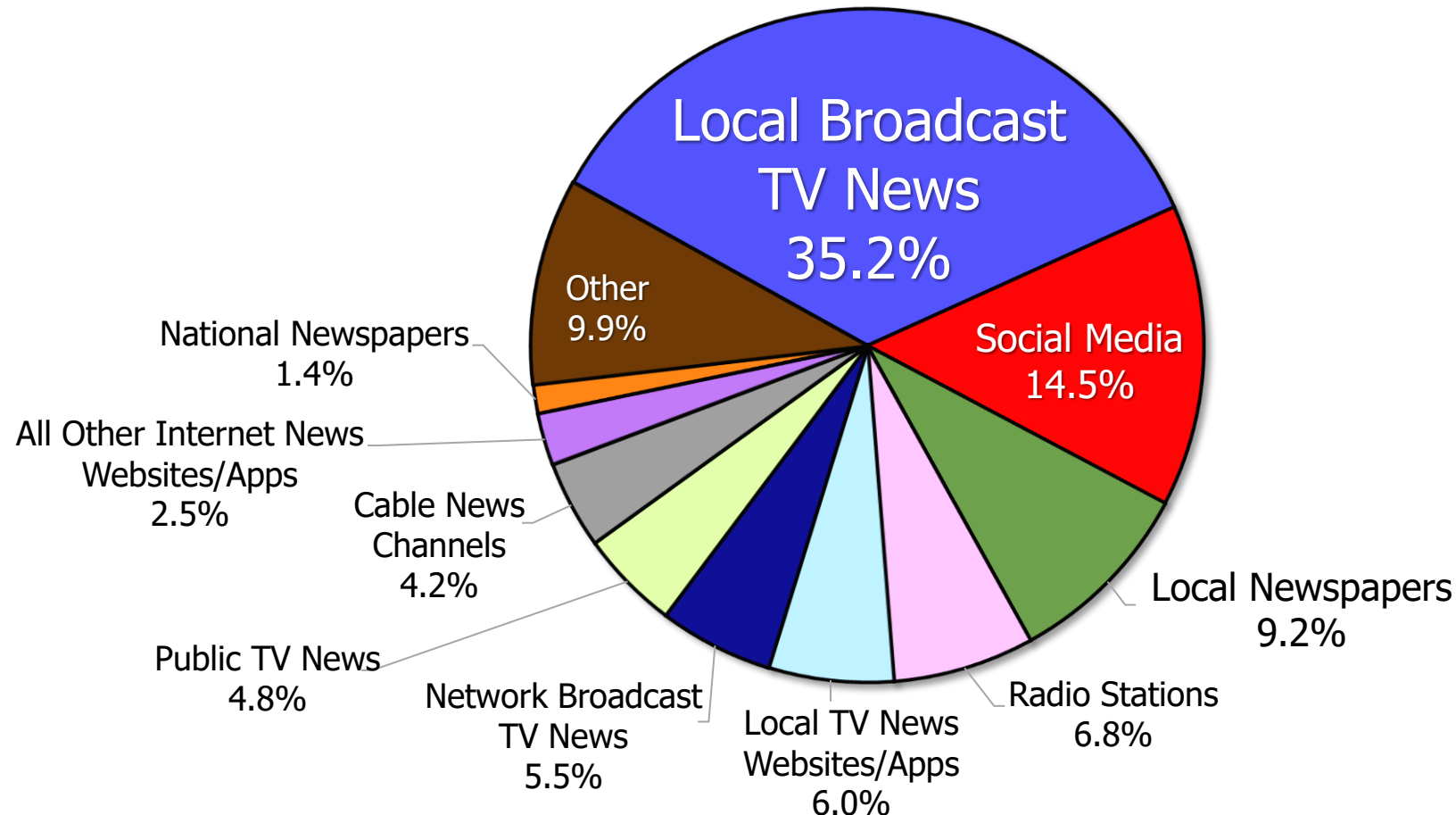
# Local Television Websites/Apps Most Preferred

Which of the following **websites or apps** are you most likely to turn to when you need information about local news or events?



# Local Broadcast Television News: Most Involved In Your Community

**Which source of news do you feel is the most involved in your community?**

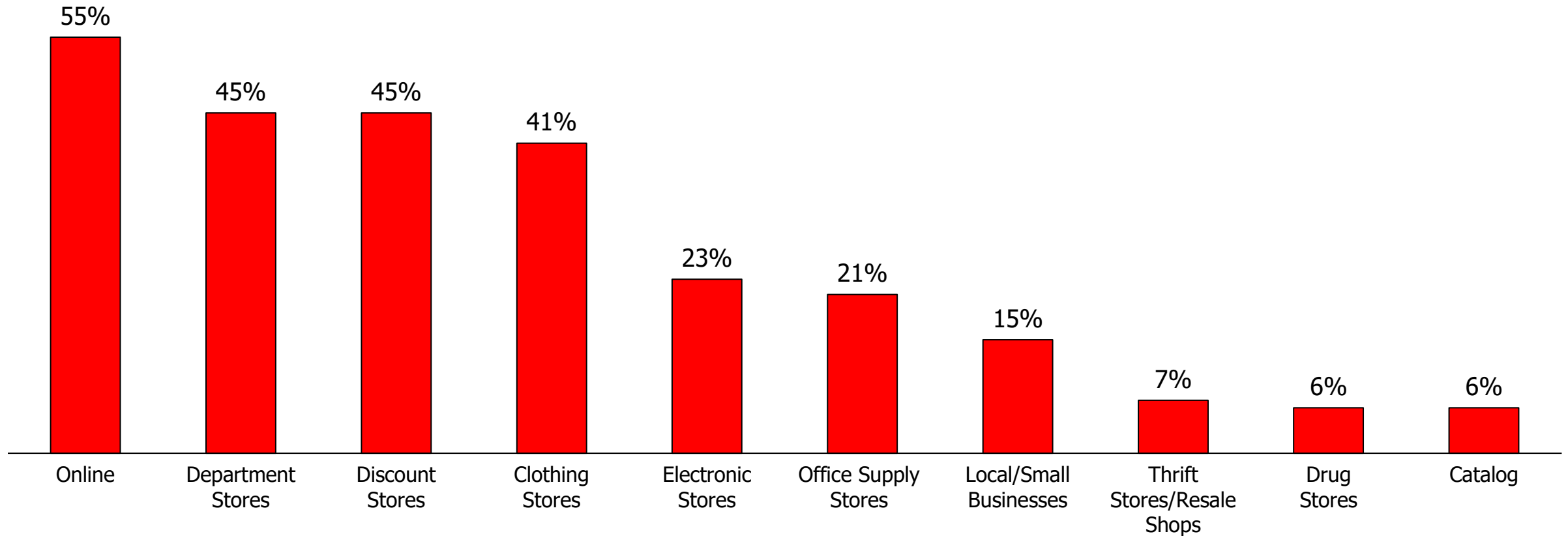


Source: GfK TVB Media Comparisons Study 2023. Persons 18+. Includes only those who chose a media.  
Q08 - And, which source of news do you feel is the most involved in your community?

However Consumers Shop,  
TV Advertising is Key

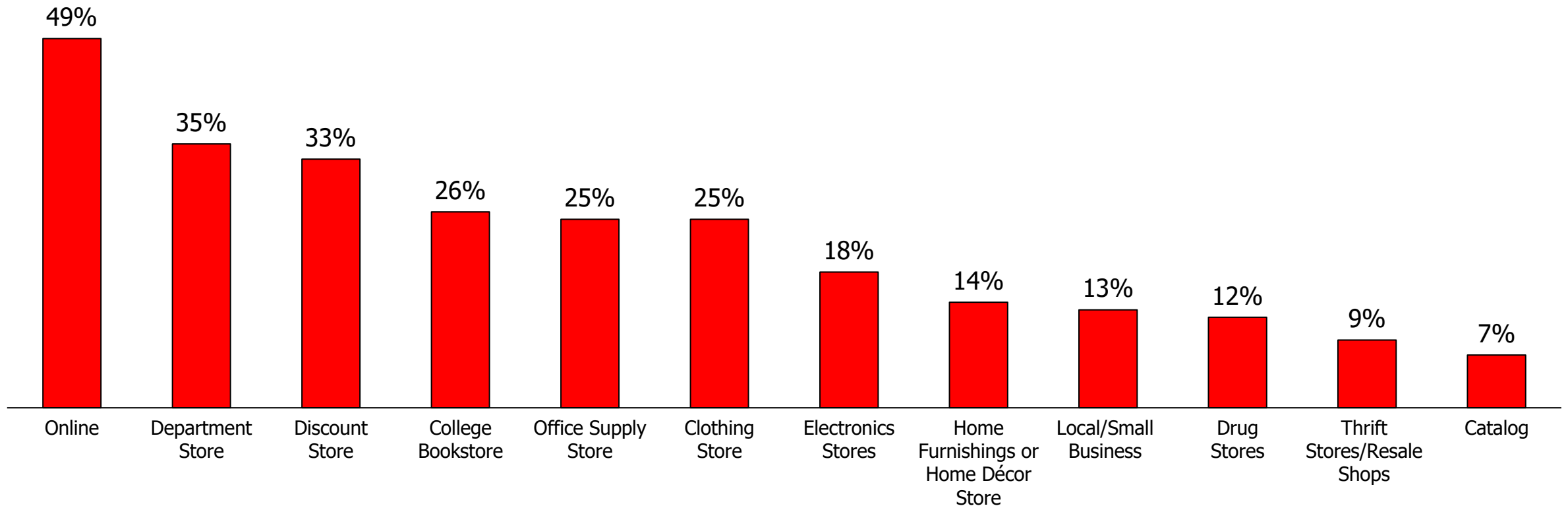
# When Shopping for **Back-to-School**, 55% Will Shop Online This Season

## Where Consumers Plan to Shop



# When Shopping for **Back-to-College**, 49% Will Shop Online This Season

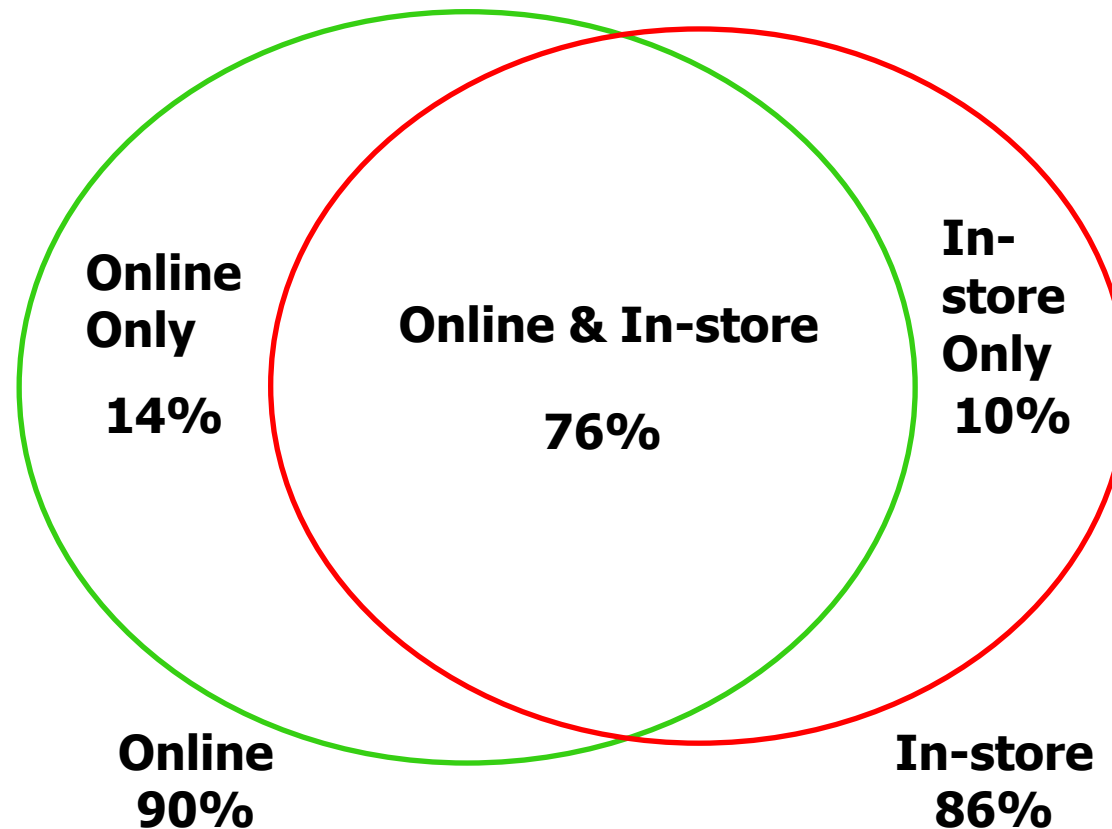
## Where Consumers Plan to Shop





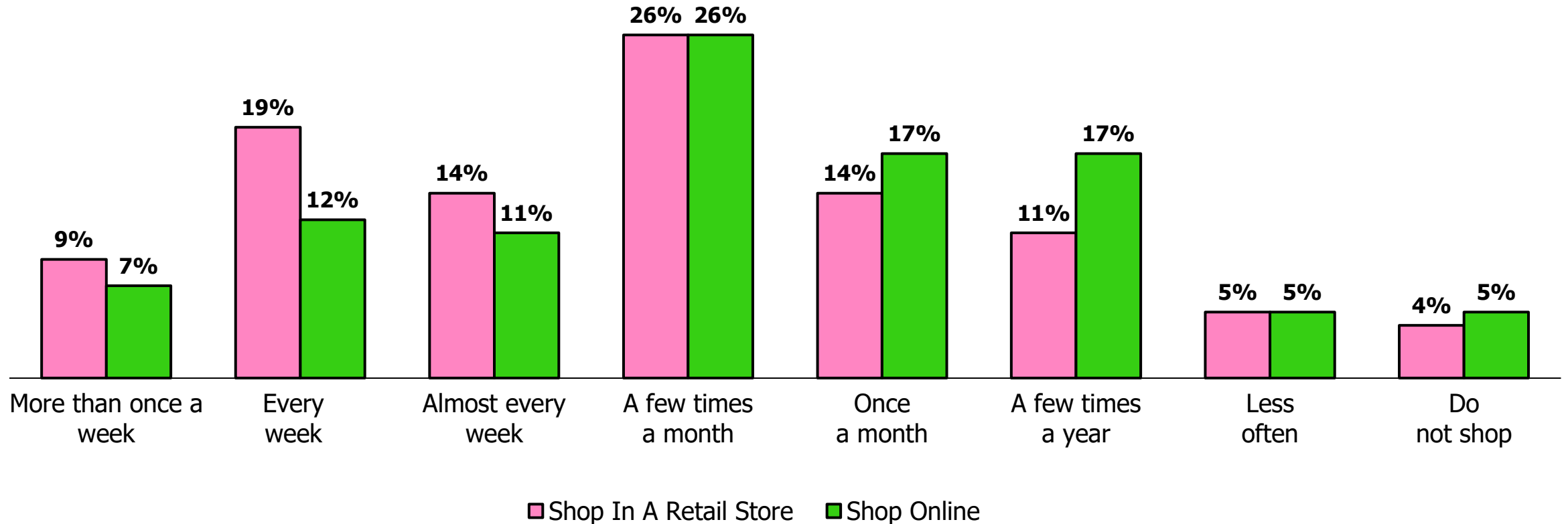
# Nearly 8 In 10 Retail Consumers Shopped Both In-Store & Online

Retail Online = Online Only + Online & In-store  
Retail In-Store = In-Store Only + Online & In-store

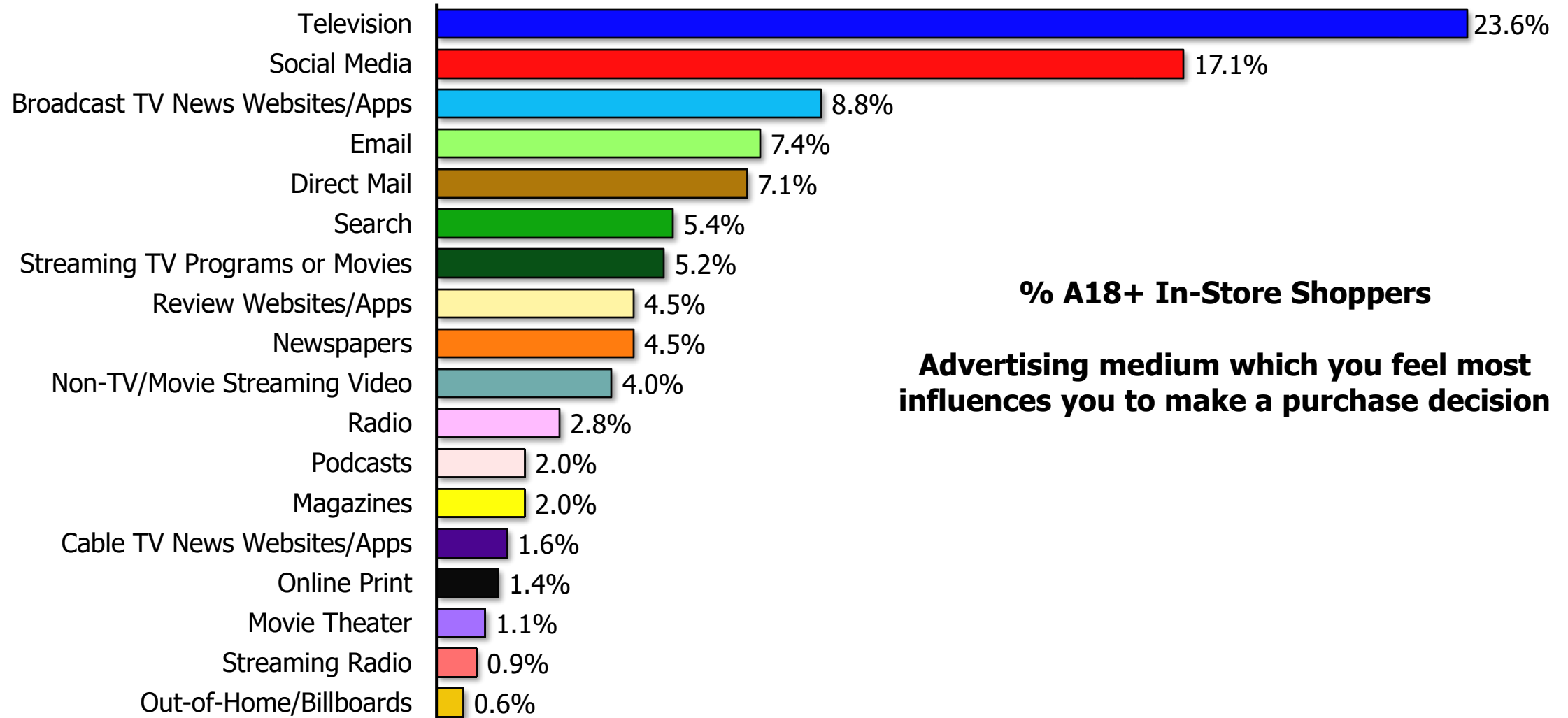


# 82% of Consumers Shop In a Retail Store, 73% Shop Online At Least Once A Month

How often, if at all, do you shop in a retail store/online?  
Adults 18+

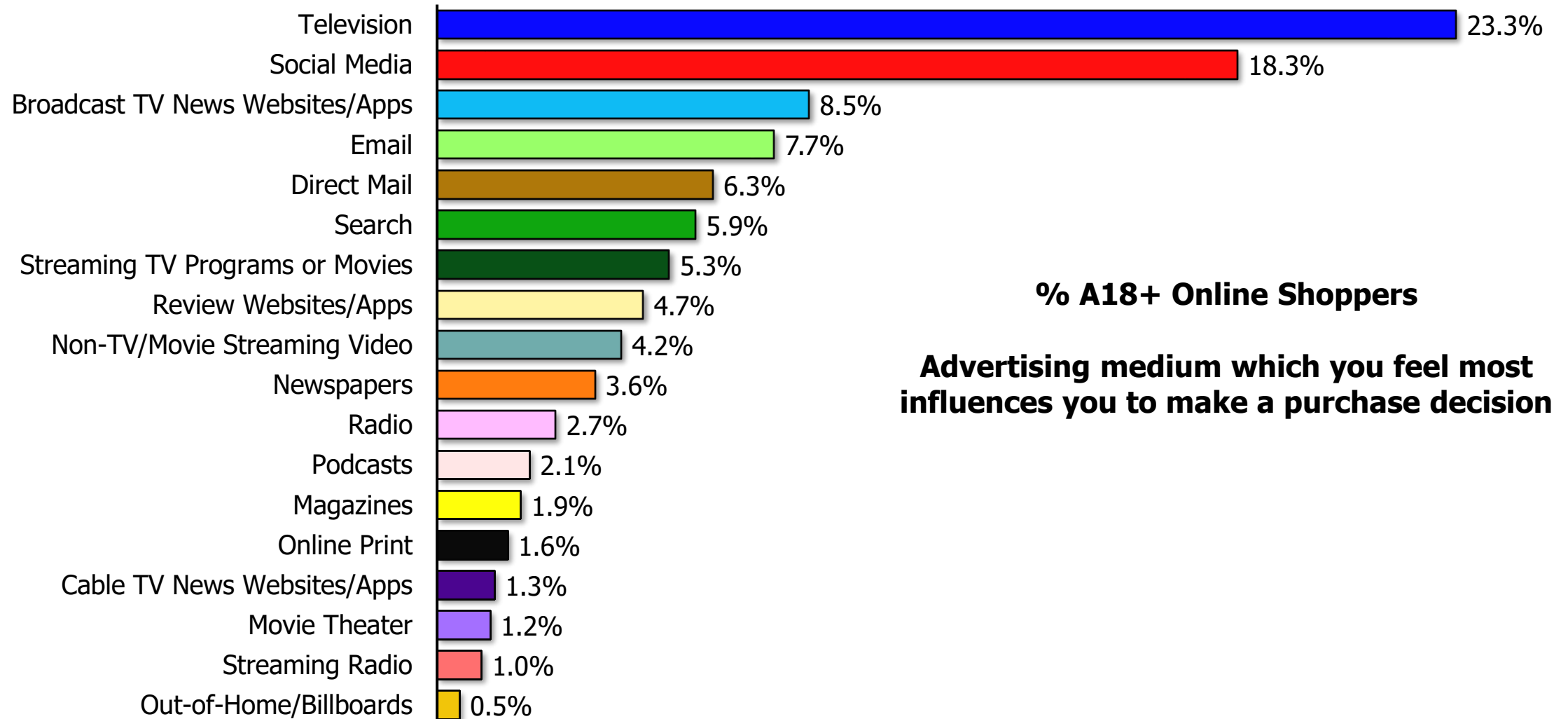


# Television is The Top Advertising Medium That Influences Purchase Decisions For In-Store Shoppers



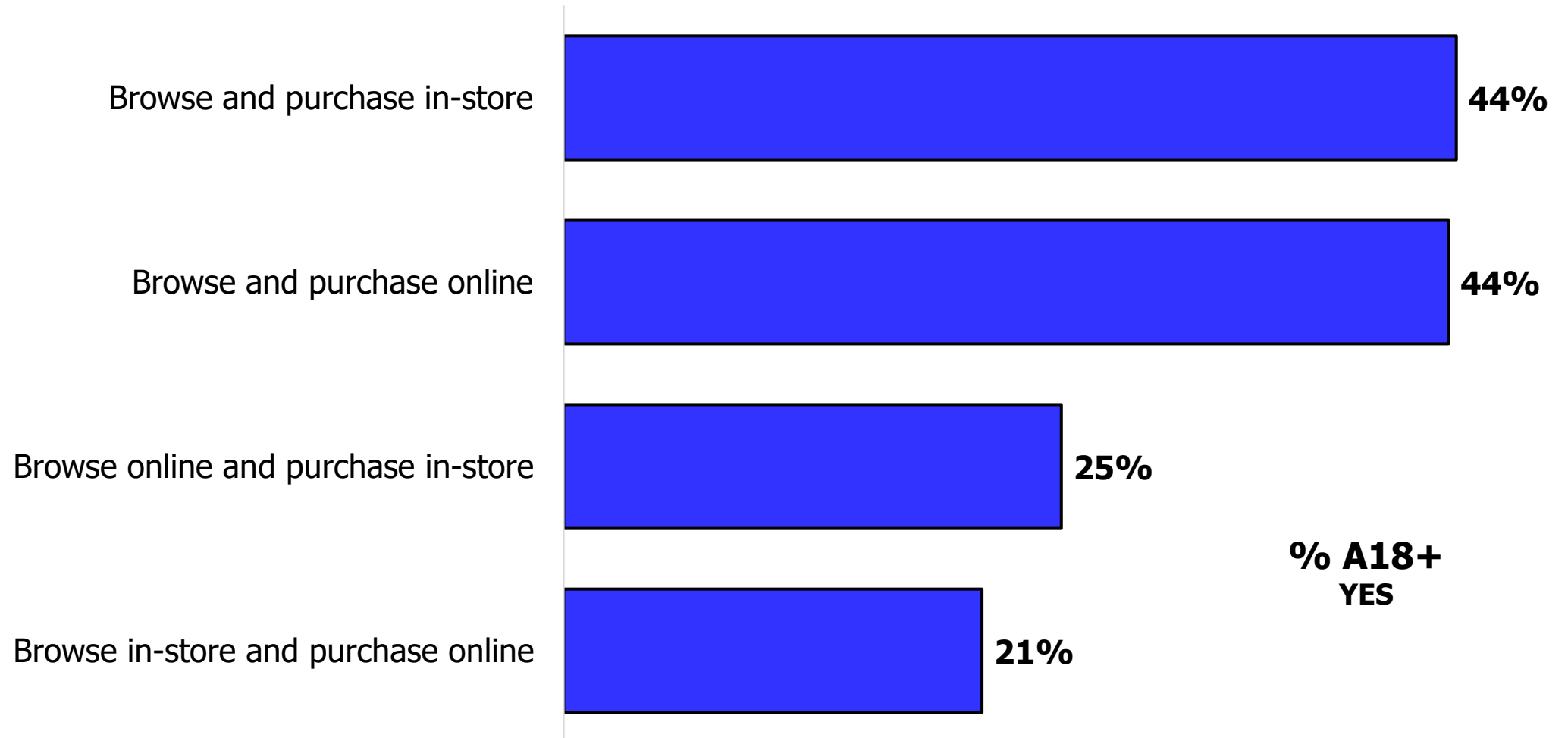
Source: GfK TVB Media Comparisons Study 2023. Persons 18+ Have you recently or do you plan in the next month, to do any shopping in a retail store: Yes. Includes only those who chose a media. Q01 - Please select the one type of advertising medium which, you feel, most influences you to make a purchase decision? Broadcast TV News Websites/Apps includes local TV station & network websites/apps for news/weather/sports.

# Television is The Top Advertising Medium That Influences Purchase Decisions For Online Shoppers



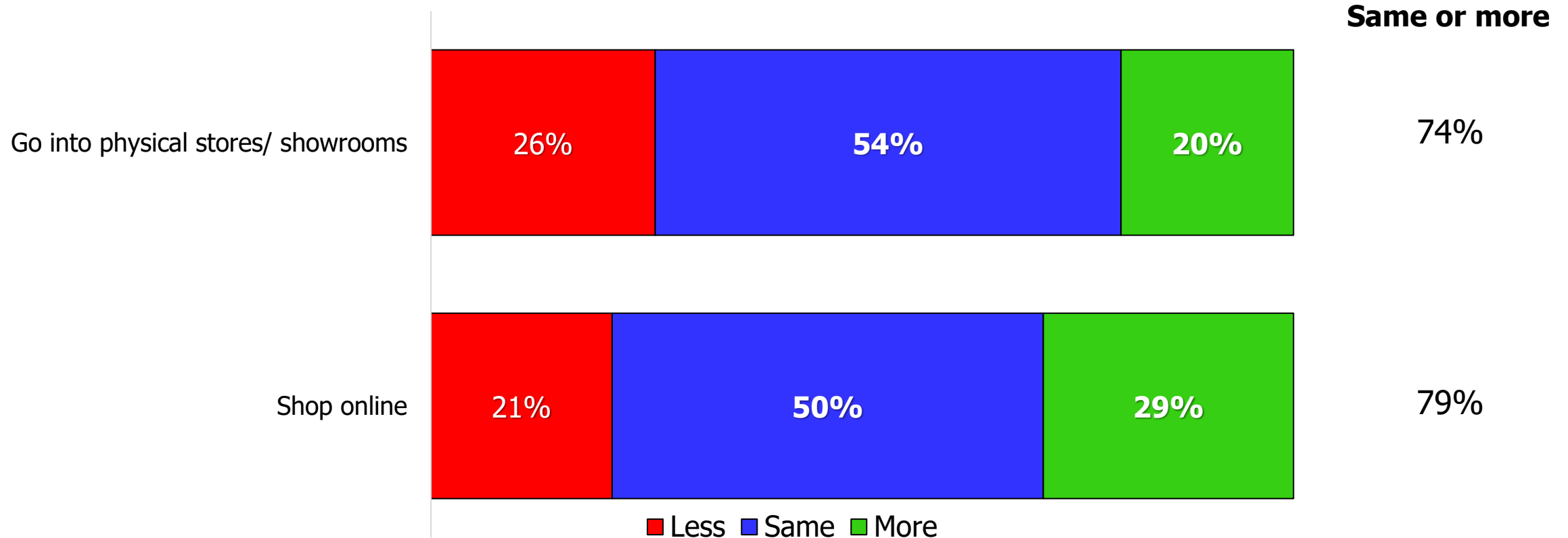
Source: GfK TVB Media Comparisons Study 2023. Persons 18+ Have you recently, or do you plan in the next month, to do any shopping online: Yes. Includes only those who chose a media. Q01 - Please select the one type of advertising medium which, you feel, most influences you to make a purchase decision? Broadcast TV News Websites/Apps includes local TV station & network websites/apps for news/weather/sports.

# Have You Purchased, or Do you Plan To Purchase From the Following?



# Are You Currently, Or Planning to Do More, Less, or The Same?

**In-store retail**  
**% A18+ compared to last year**

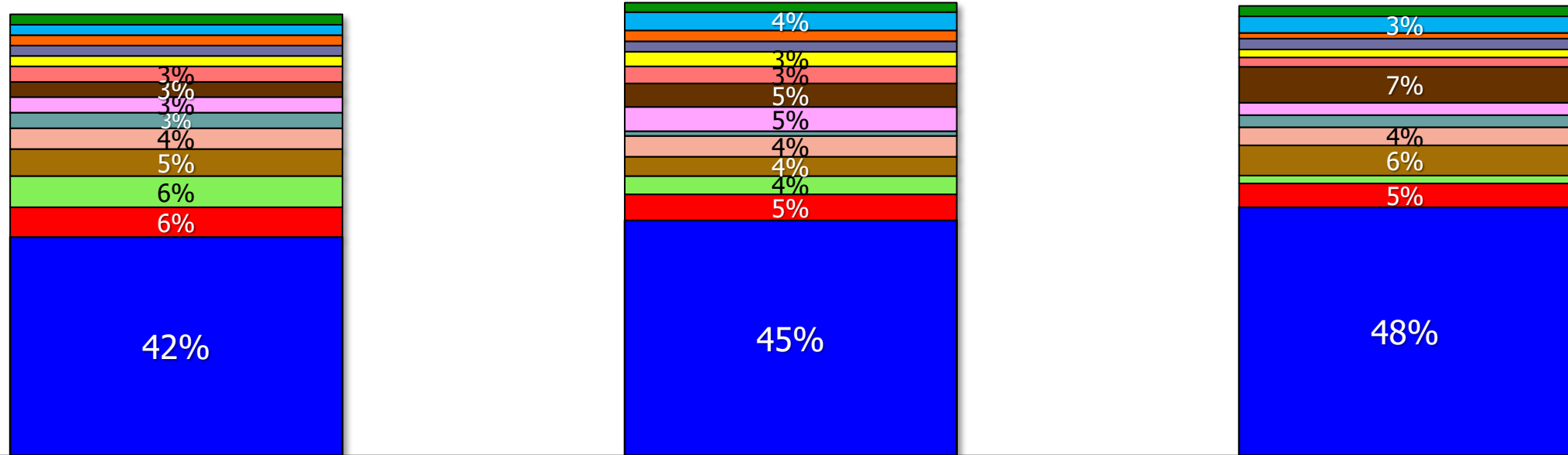


Source: GfK TVB Purchase Funnel 2023 In-store retail category, A18+

CI-1: "For each of the following, are you currently or planning to do more, less or the same compared to what you did a year ago?" Among those for whom the questions were applicable.

# What Influenced Consumers Most For Online Retail: Awareness

% A18+ Online Retail



Browse & Purchase Online

Browse Online,  
Purchase In-store

Browse in-store,  
Purchase Online

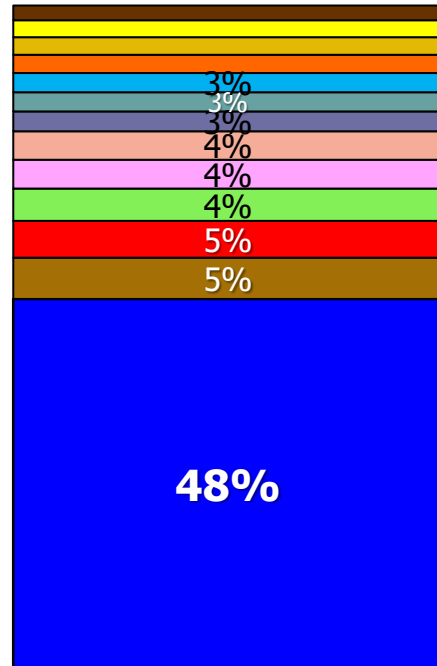
- Television (Broadcast & Cable)
- Ad in mail
- Radio
- Magazine (print only)
- Broadcast TV web/apps

- Social media
- Streaming TV shows online w/ads
- Ad on a website
- Internet video ad
- Internet search

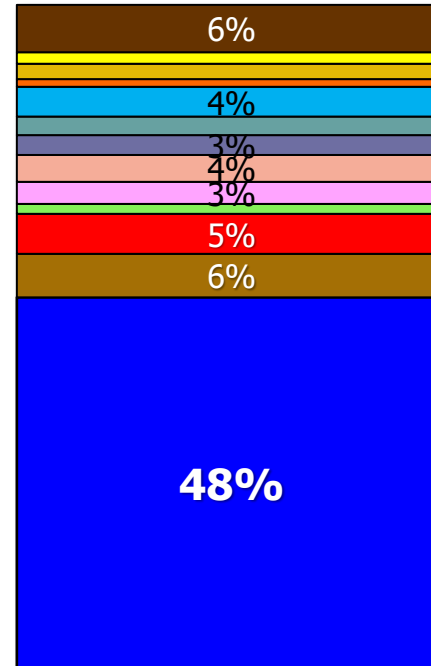
- Email
- Streaming video other than TV/Movies
- Internet display/banner ad
- Newspaper (print only)

# What Influenced Consumers Most For In-Store Retail: Awareness

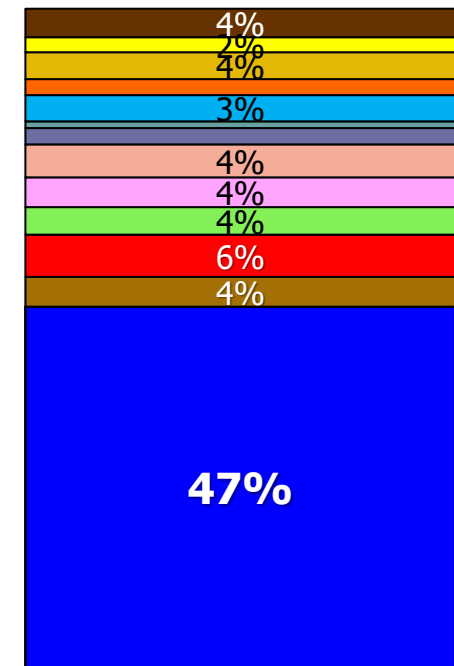
In-store Retail % A18+



Browse & Purchase In-store



Browse In-store,  
Purchase Online



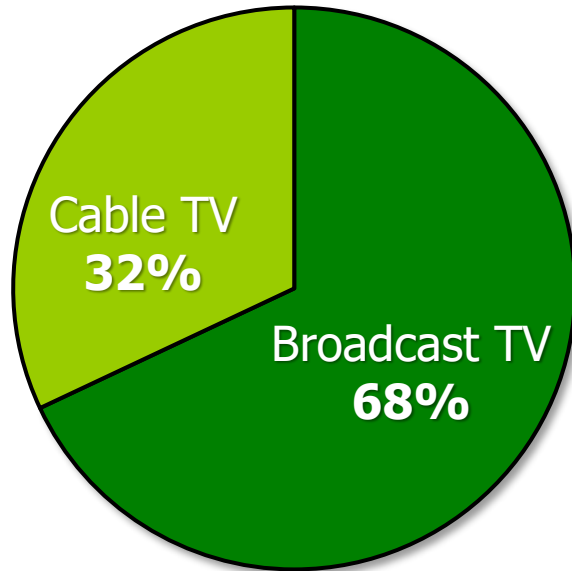
Browse Online,  
Purchase In-store



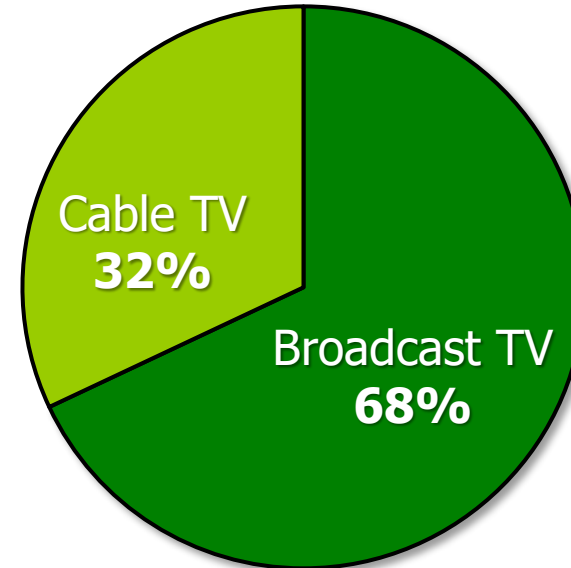


# Of Those that Cited TV as the Most Important in Awareness Phase, 7 out of 10 Picked Broadcast TV

In-Store Retail

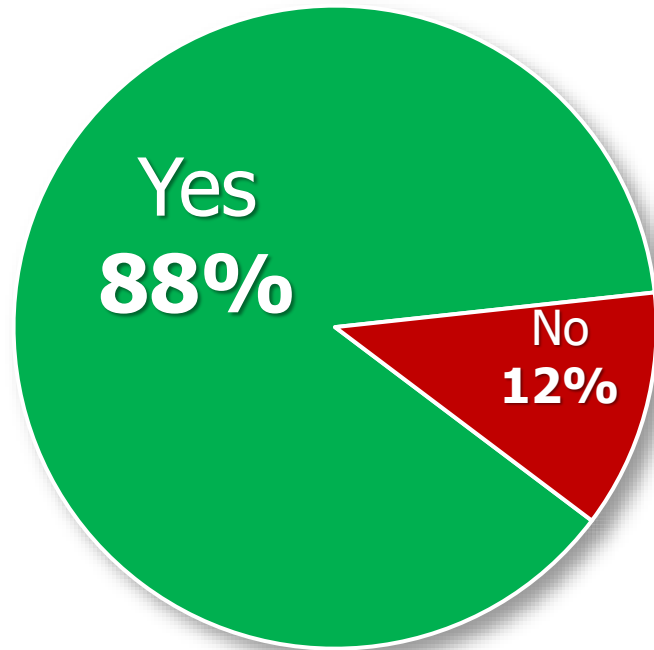


Online Retail

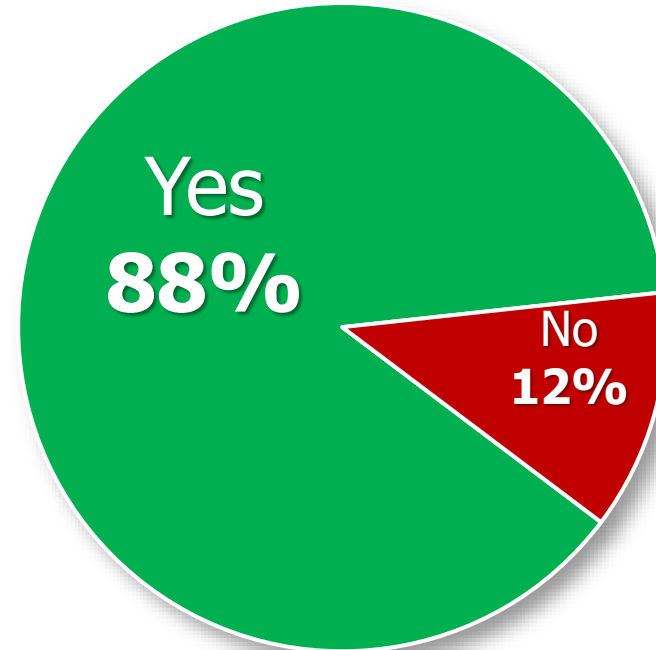


# "Have TV ads influenced your search selections?"

**In-store Retail**  
% A18+ Who do online searches



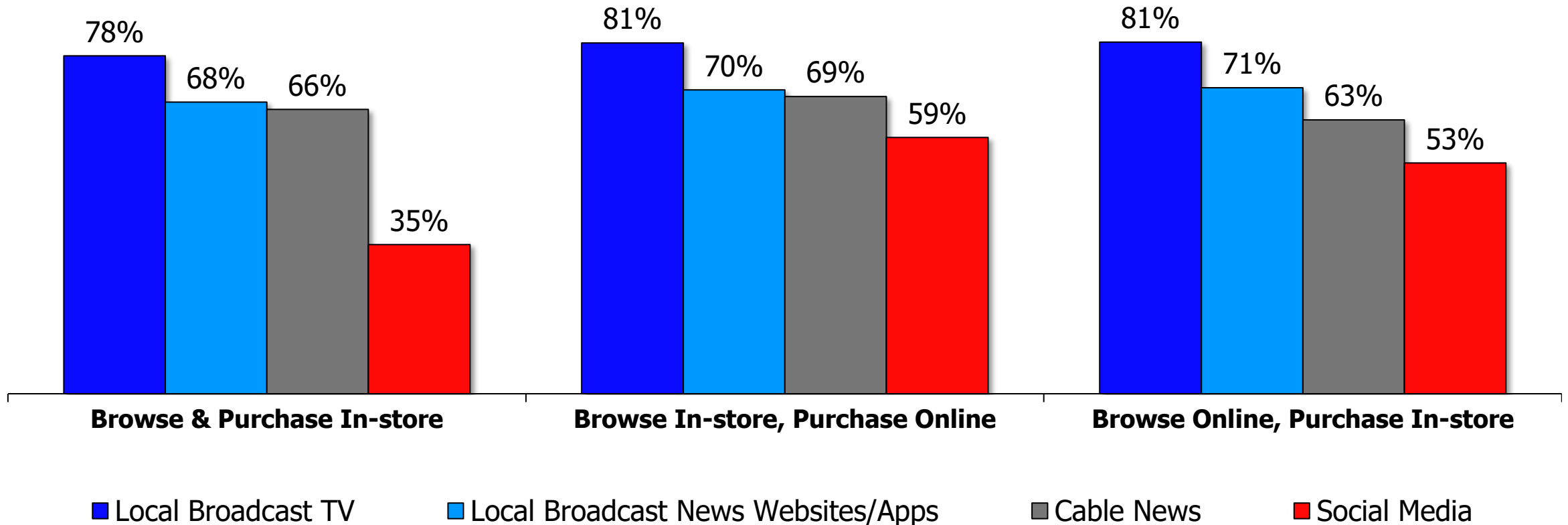
**Online Retail**  
% A18+ Who do online searches



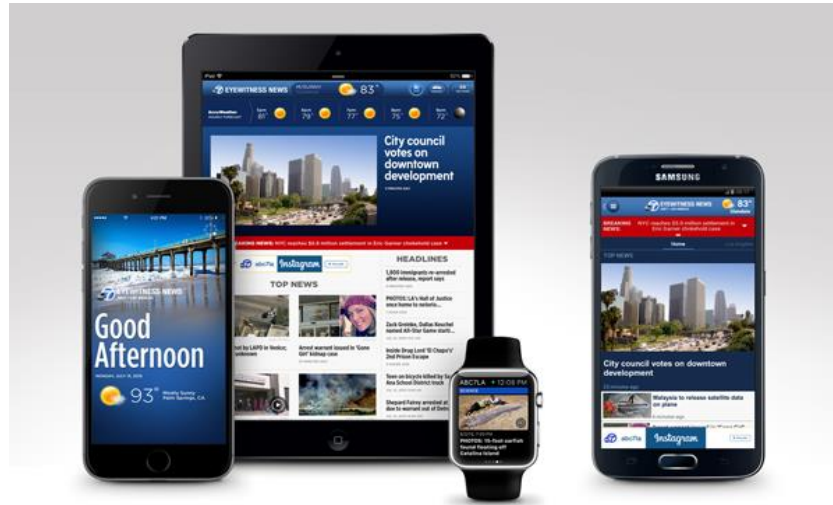
Source: GfK TVB Purchase Funnel 2023 In-store/online retail category A18+  
QA10 "When doing an online search, how often, if at all, have TV ads you have seen influenced you in some ways in your search?" (Yes = combination of Every time, Most of the time & Sometimes)

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

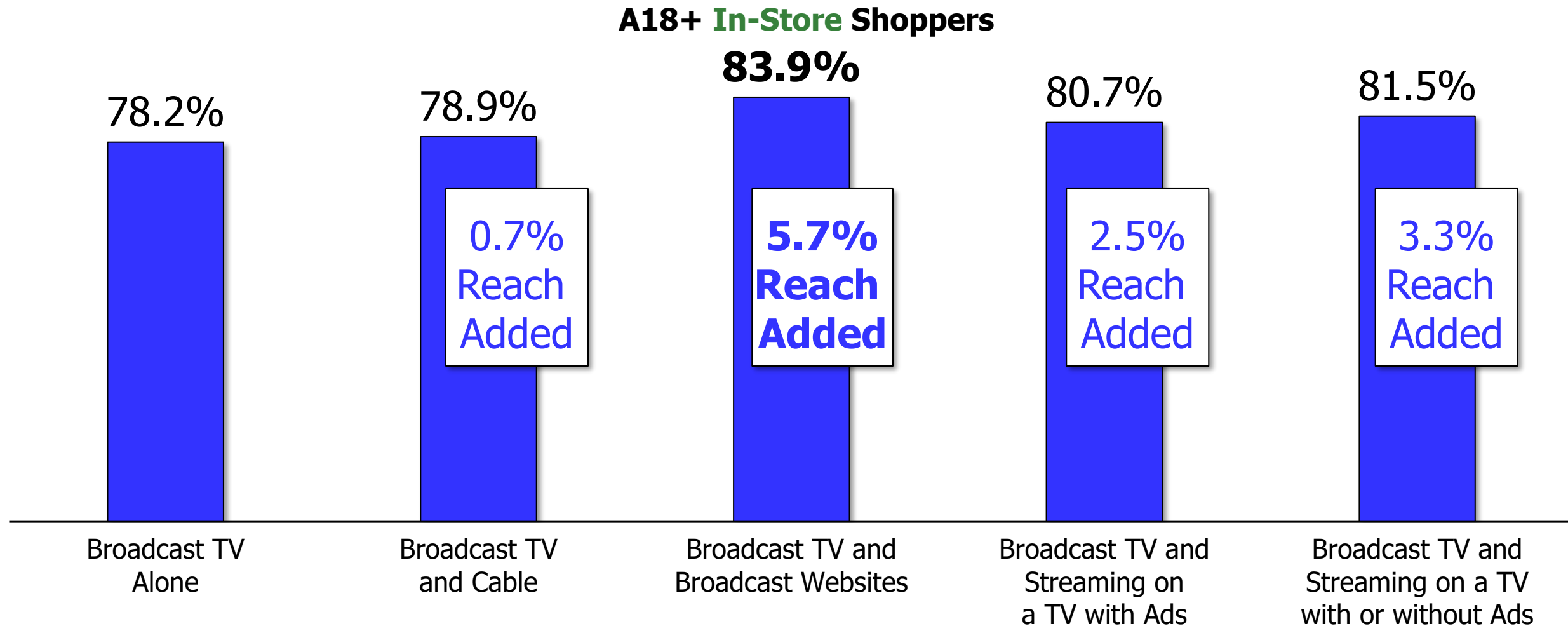
**In-store retail  
% A18+ Agreeing**



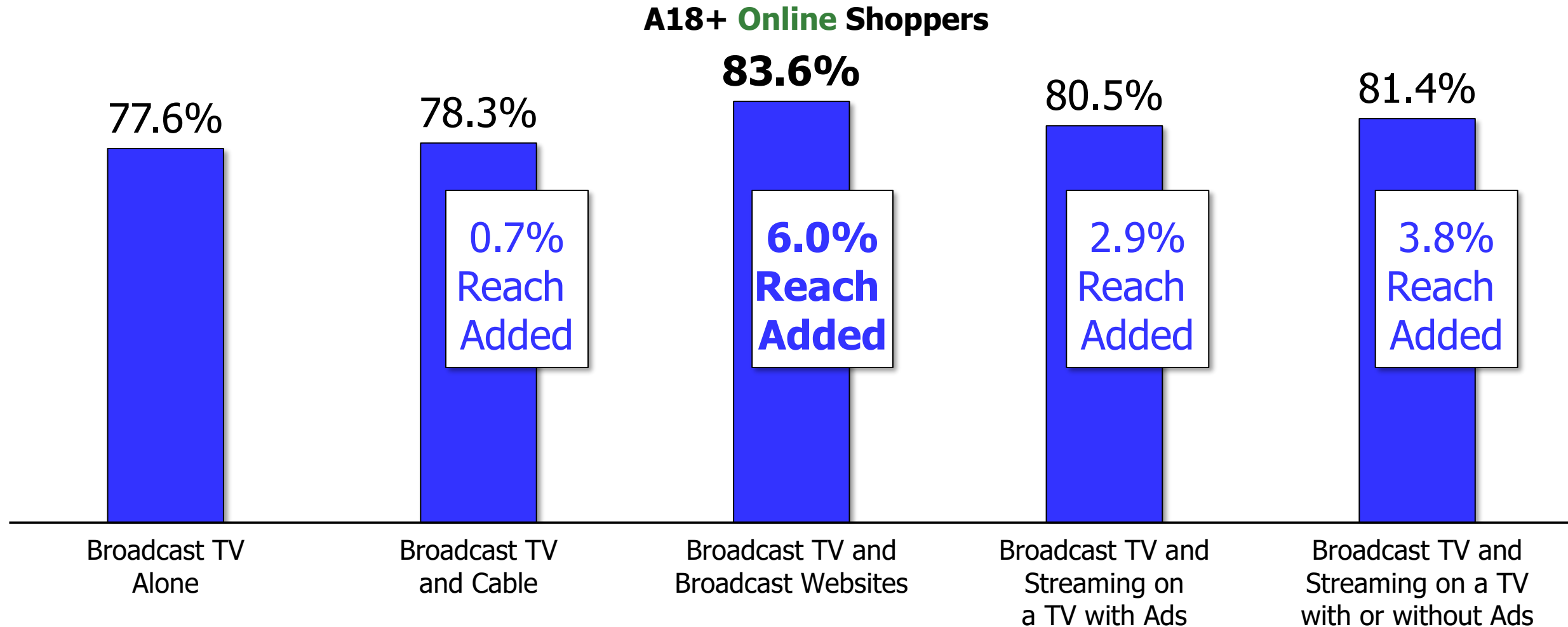
# Broadcast TV Websites/Apps Provide Multi-platform Opportunities



# Broadcast Websites Added More Reach to Broadcast TV than Cable or Streaming For In-Store Shoppers



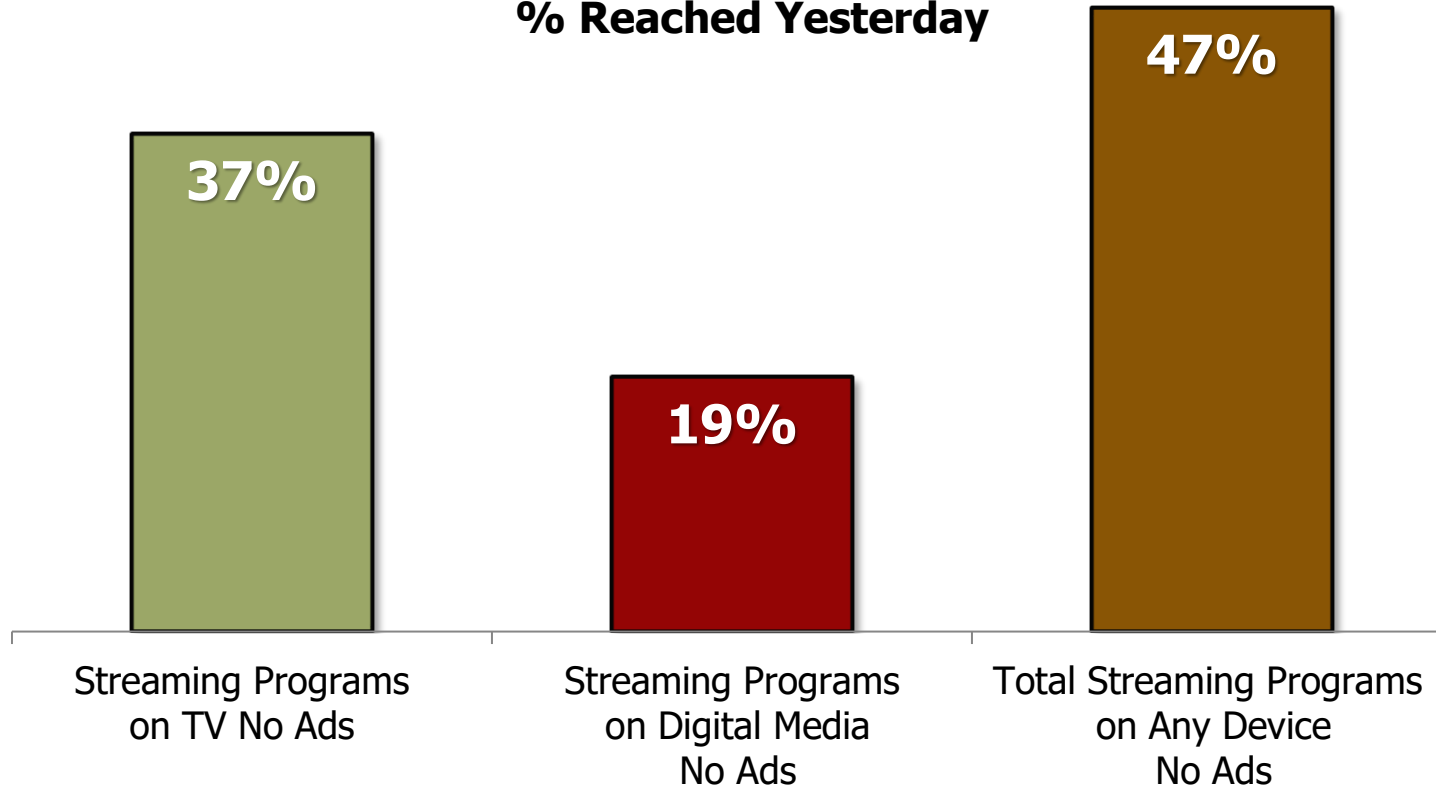
# Broadcast Websites Added More Reach to Broadcast TV than Cable or Streaming For **Online** Shoppers



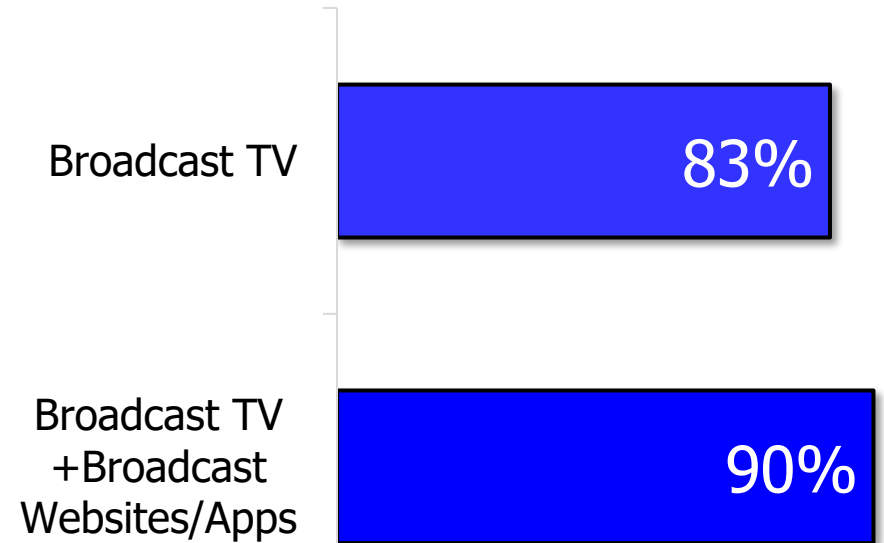
# Broadcast TV Assets Can Reach Those Who Stream Programming on Ad-Free Platforms

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

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



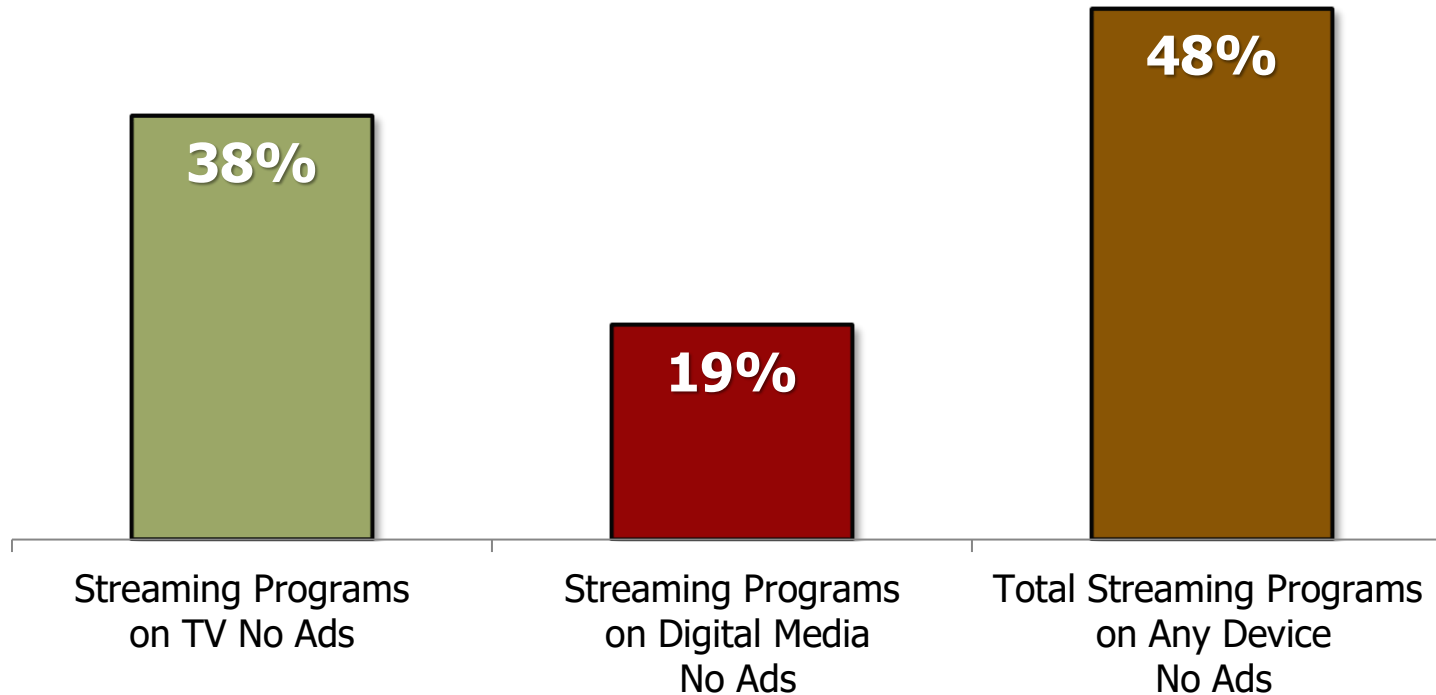
**In-Store Shoppers**  
**% Reach of Streamers with No Advertising**



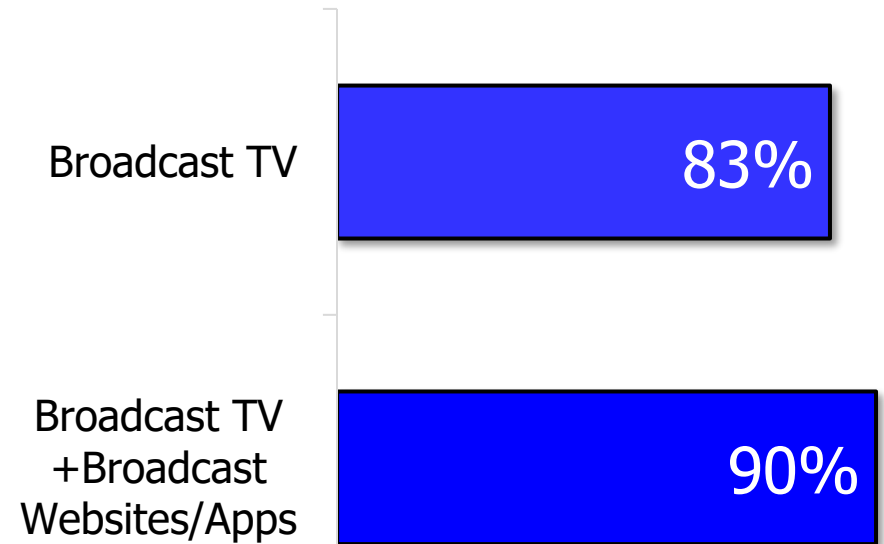


# Streaming with NO Advertising: Advertisers Cannot Reach these Viewers But Broadcast Assets **Can** Reach Most of Them

**Online Shoppers**  
**% Reached Yesterday**



**Online Shoppers**  
**% Reach of Streamers with No Advertising**



# Key Back-to-School Takeaways

- Back-to-class spending is projected to be at an all-time high in 2023.
- Parents are expected to spend more for back-to-school per child this year than last year.
- Most back-to-school shopping happens in late July and early August.
- TV advertising is imperative to influence back-to-class shoppers.
  - 9 out of 10 respondents said television influenced their search selections.
  - Broadcast TV delivers top back-to-class ratings.
  - 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 on ad-free platforms.

THANK YOU!

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