

# BACK TO SCHOOL

## 2024

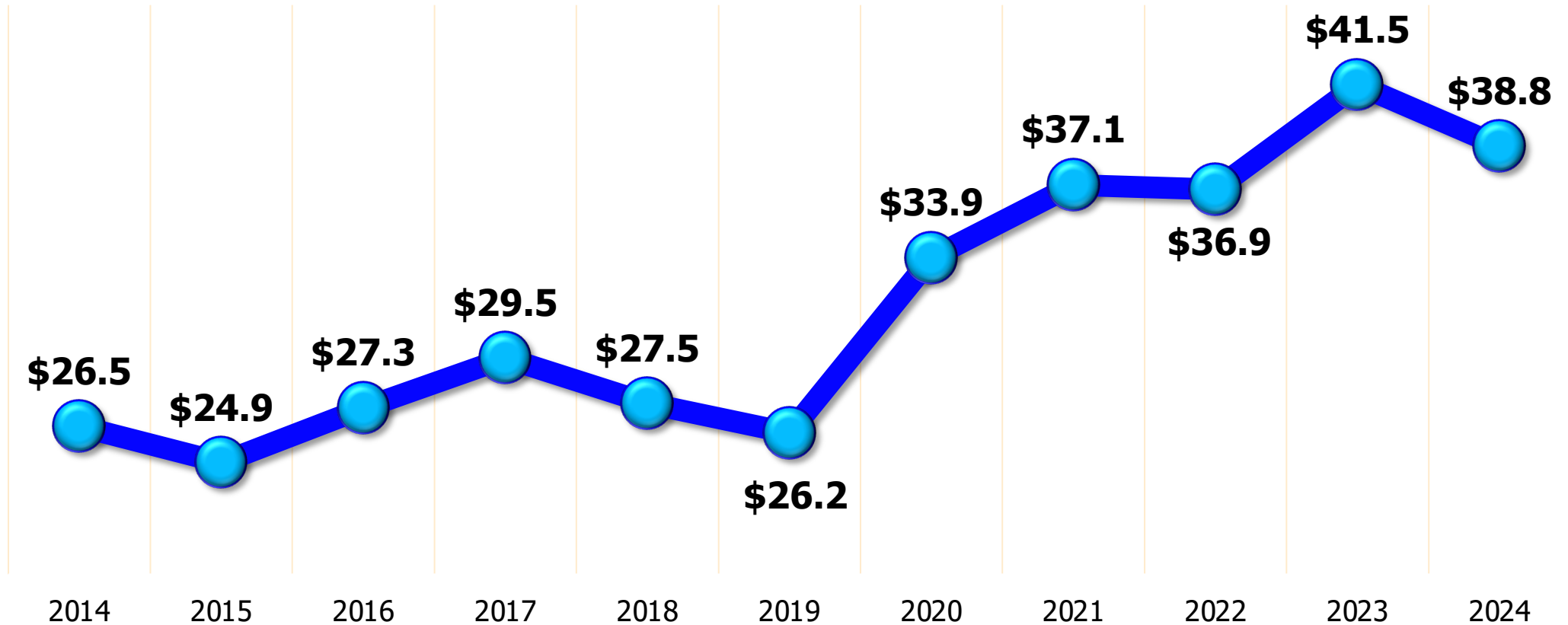
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- However Consumers Shop, TV Advertising is Key ([Slides 31-44](#))
- Broadcast TV Assets Can Reach Those Who Stream Programming on Ad-Free Platforms ([Slides 45-47](#))

# Back-to-School 2024 Marketing Data/Projections

# Back-to-School Spending is Expected to Be Lower than Last Year but Still Higher Than Previous Years

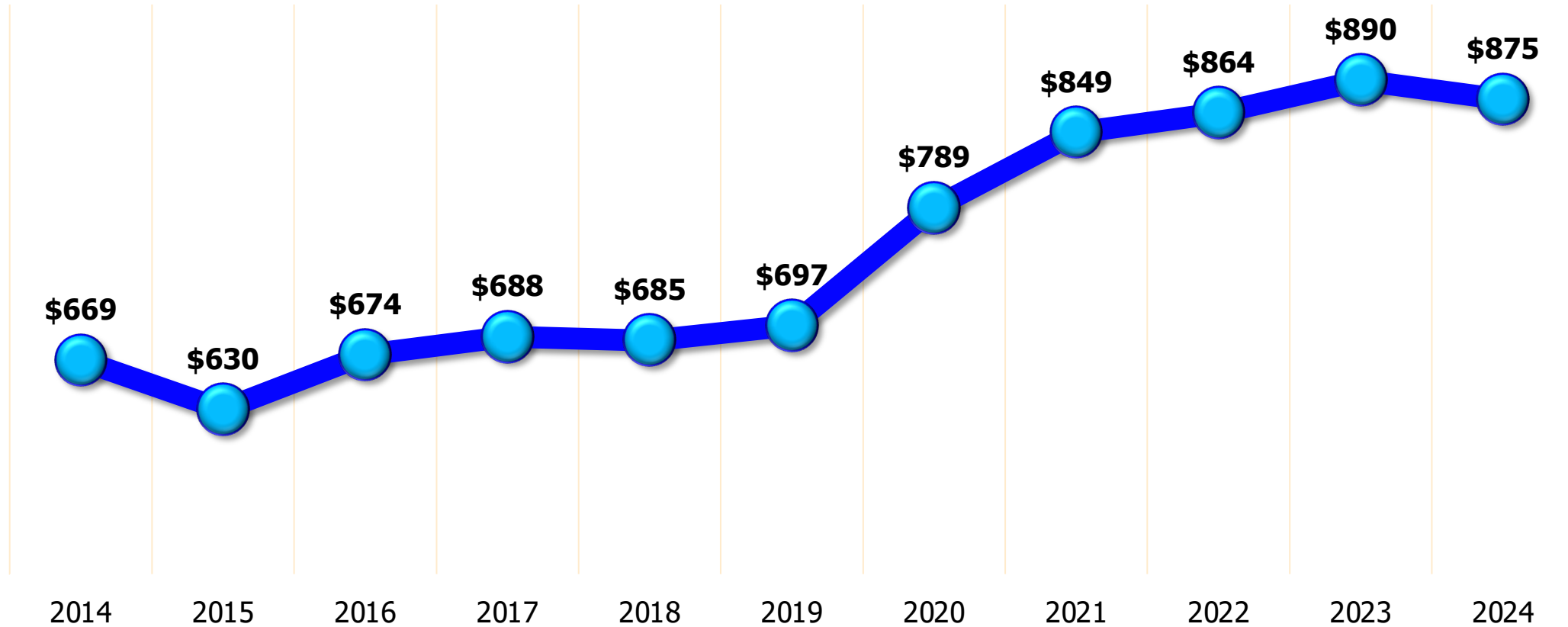
Total Spending In Billions





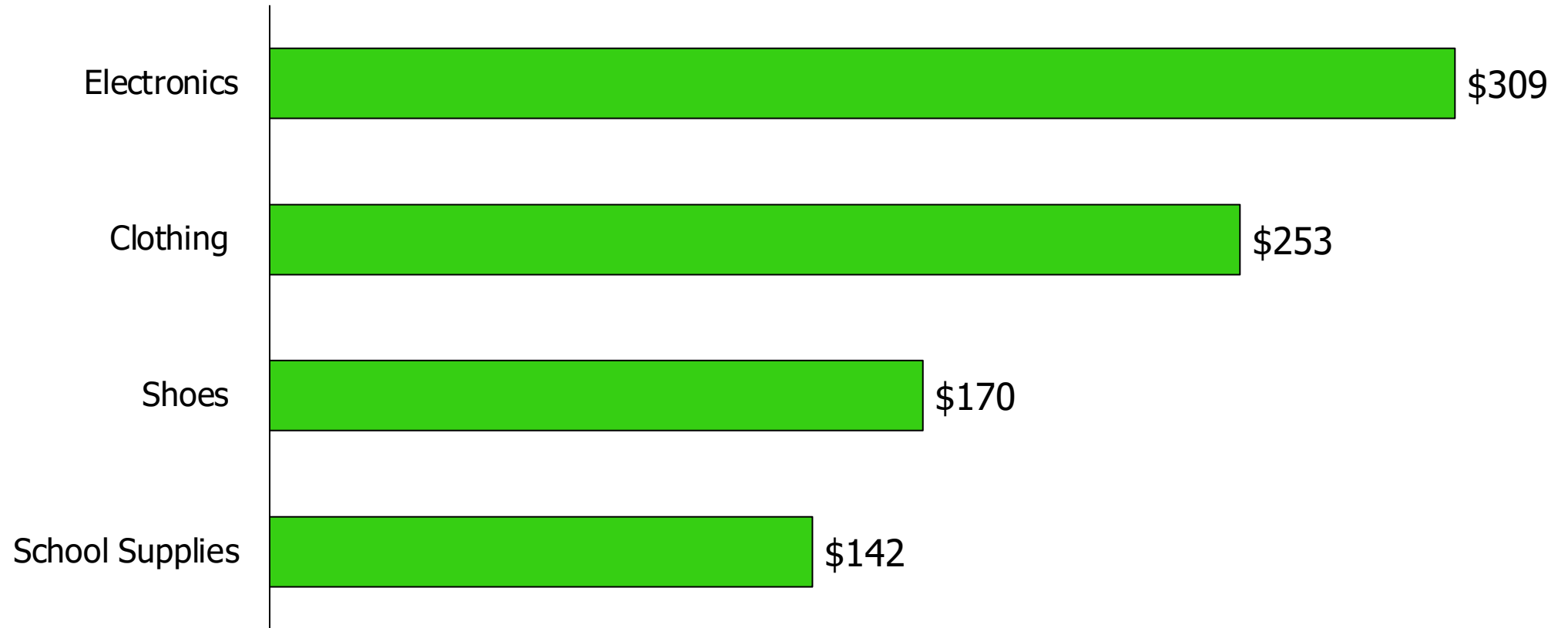
# Per Household Spending is Expected to Reach Second Highest Record in 2024

Total Per Household Average Spending for Back-to-School

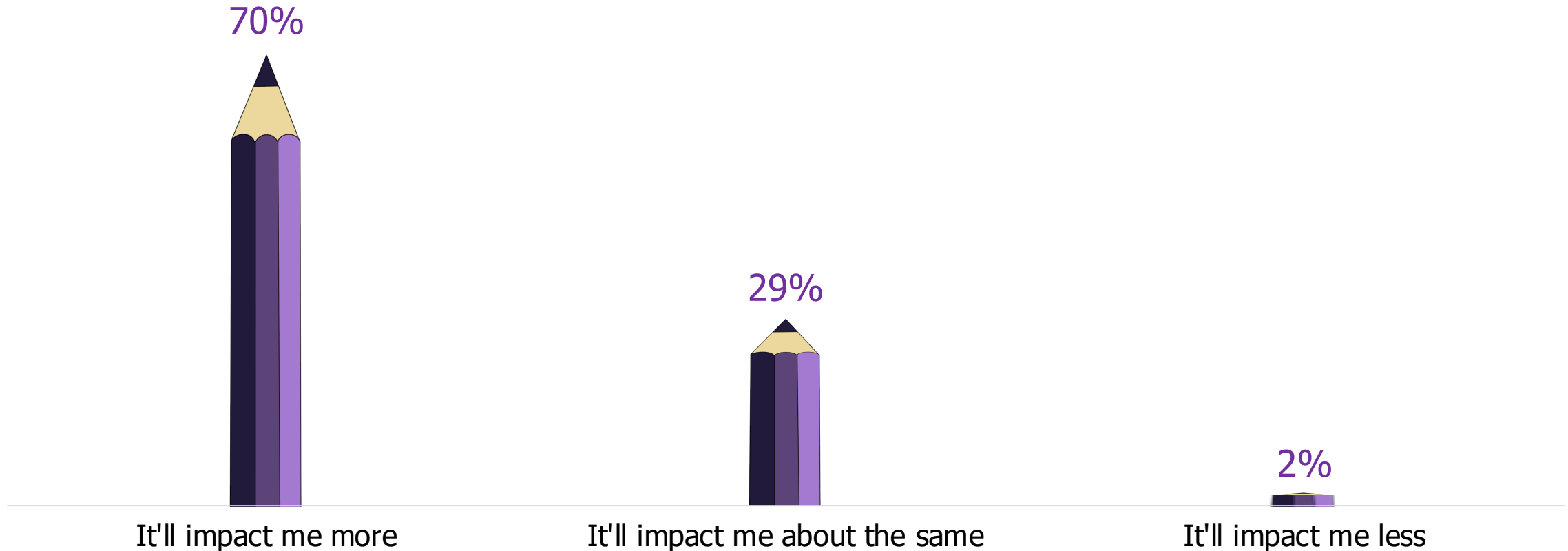


# Back-to-School Households Spend the Most Money on Electronics

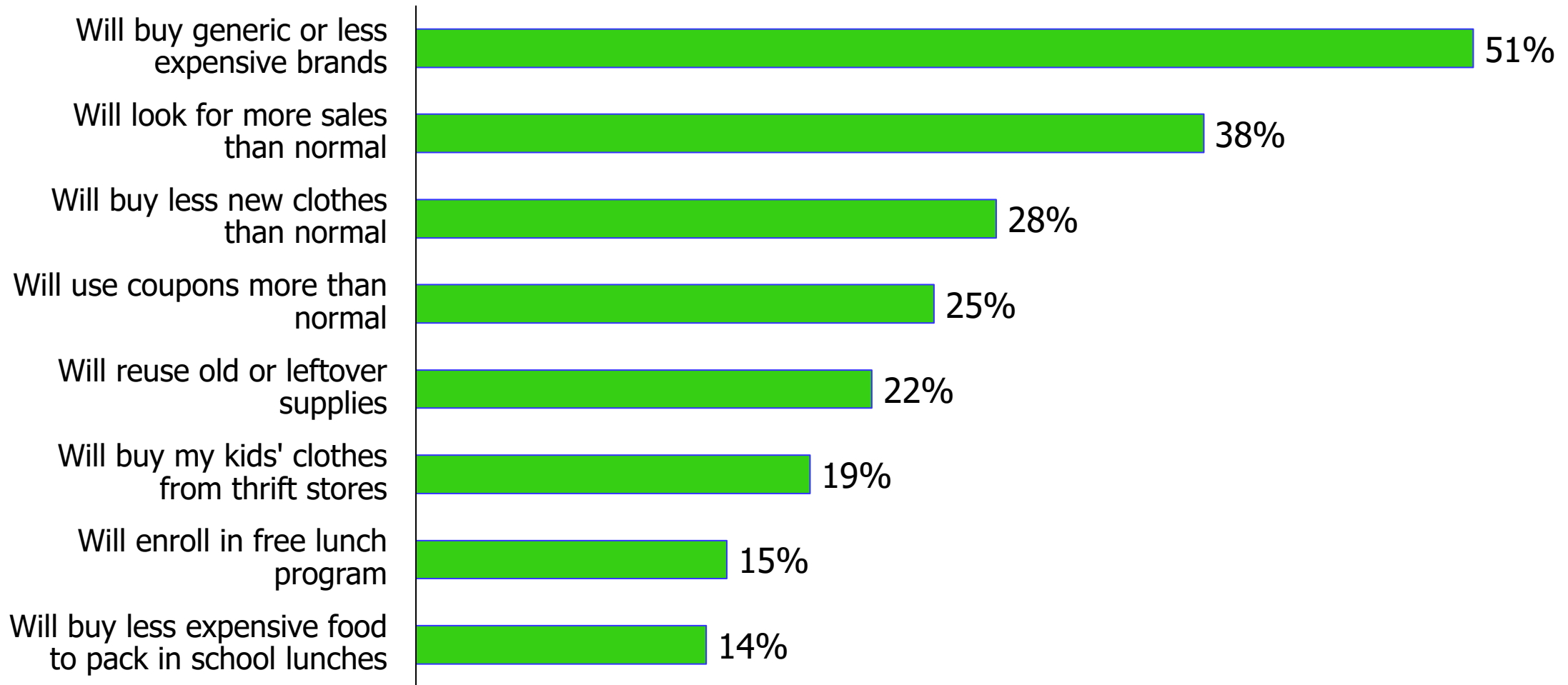
## Per Household Spending



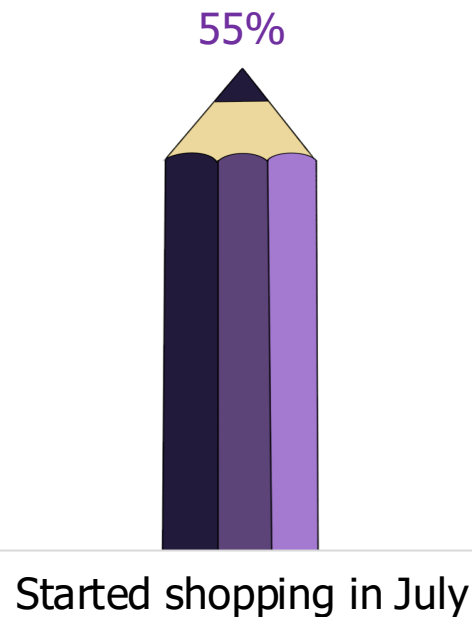
# Compared to Last Year, How Much Impact Will Inflation Have on Your Back-To-School Shopping?



# How Will Inflation Affect Your Back-To-School Shopping?



# Consumers Start Their Shopping Early, but the Majority 86% Still Wait for Deals and School Instructions

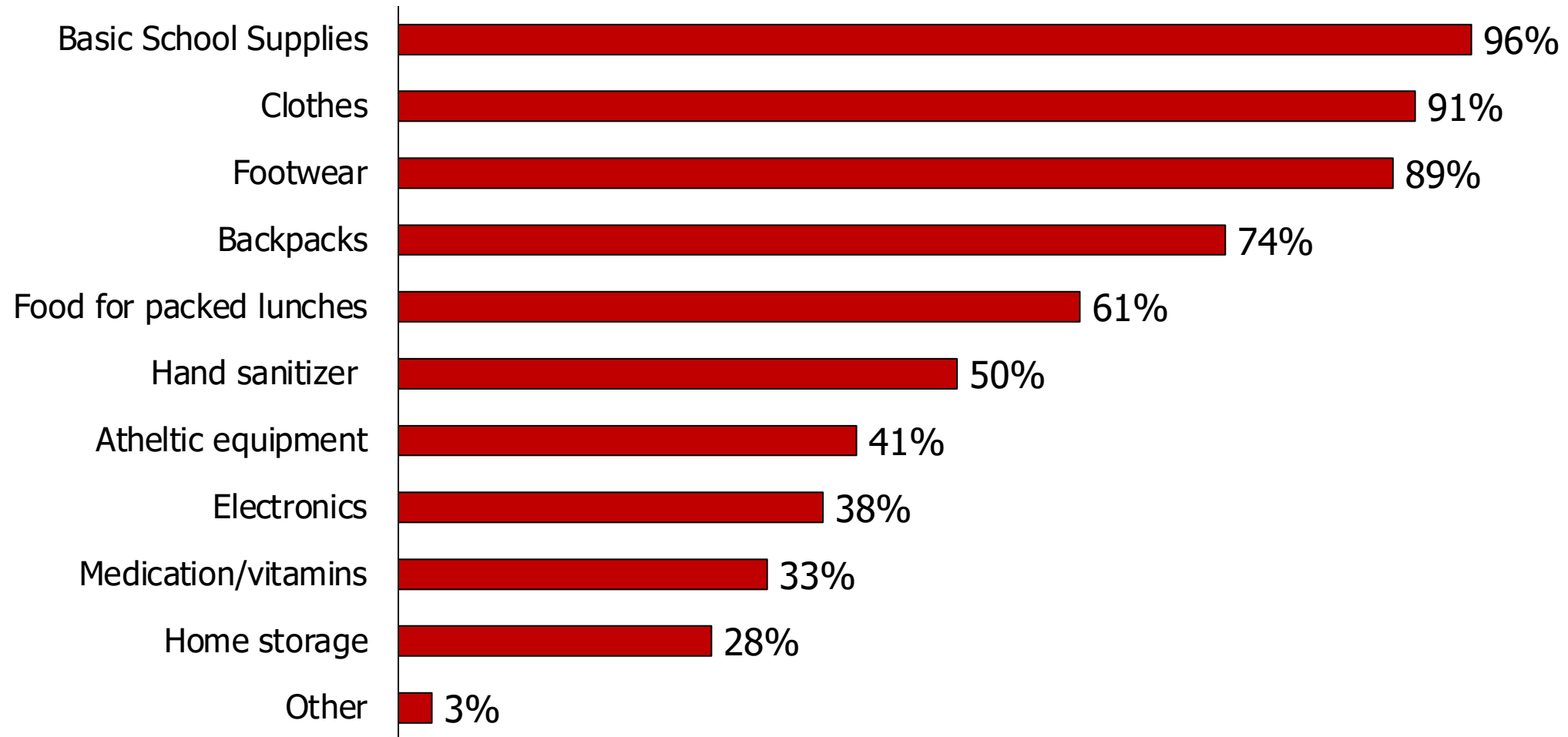


86% of consumers still have AT LEAST half of their purchases left to make

- Top 2 Reasons Why:
1. Waiting for the best deals
  2. Not sure what is needed yet

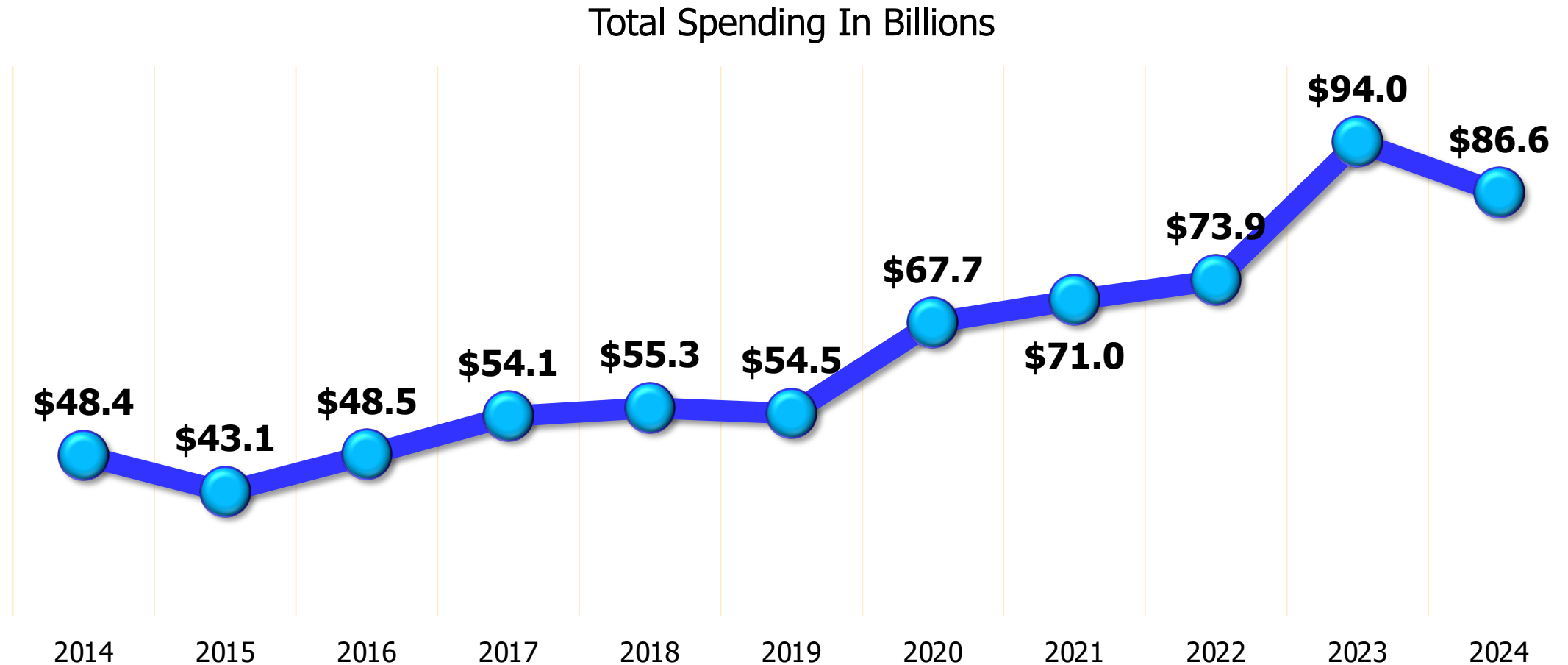


# Which of the Following do you Plan to Purchase for the Upcoming School Year?



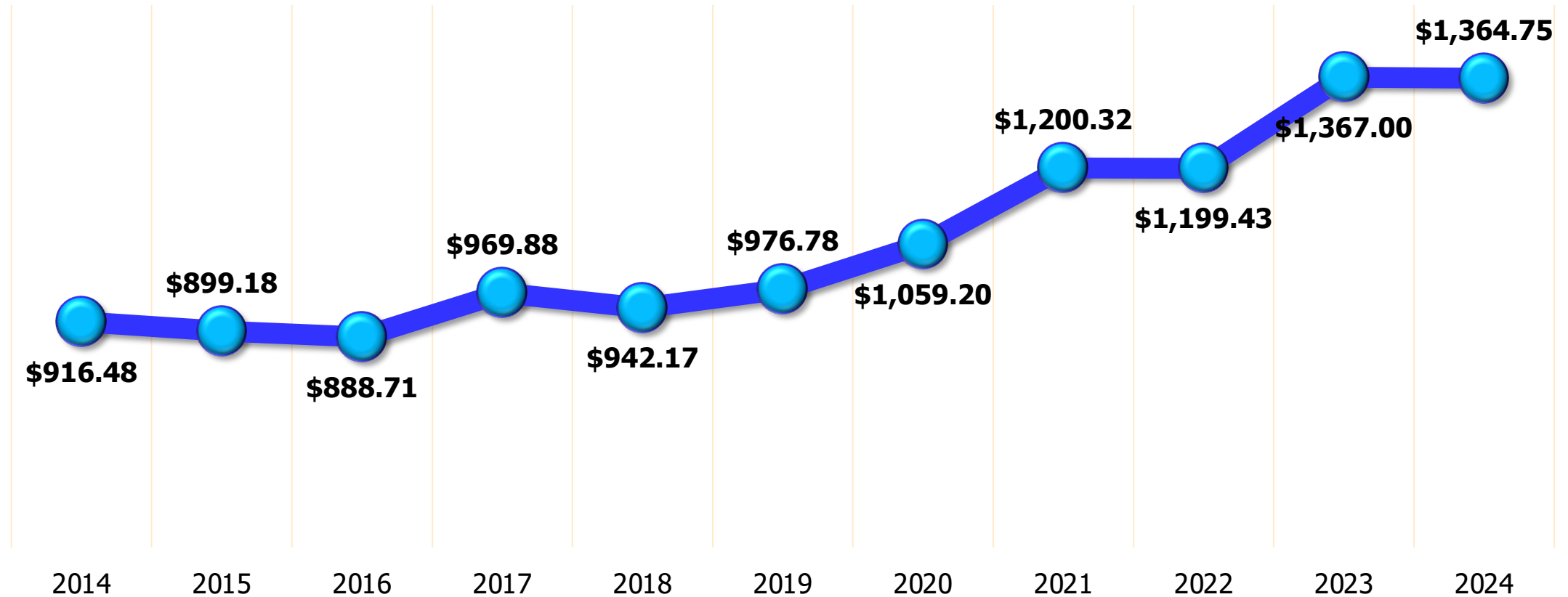
# Back-To-College

# Back-to-College Spending is Expected to Be Lower than Last Year but Still Higher than Previous Years



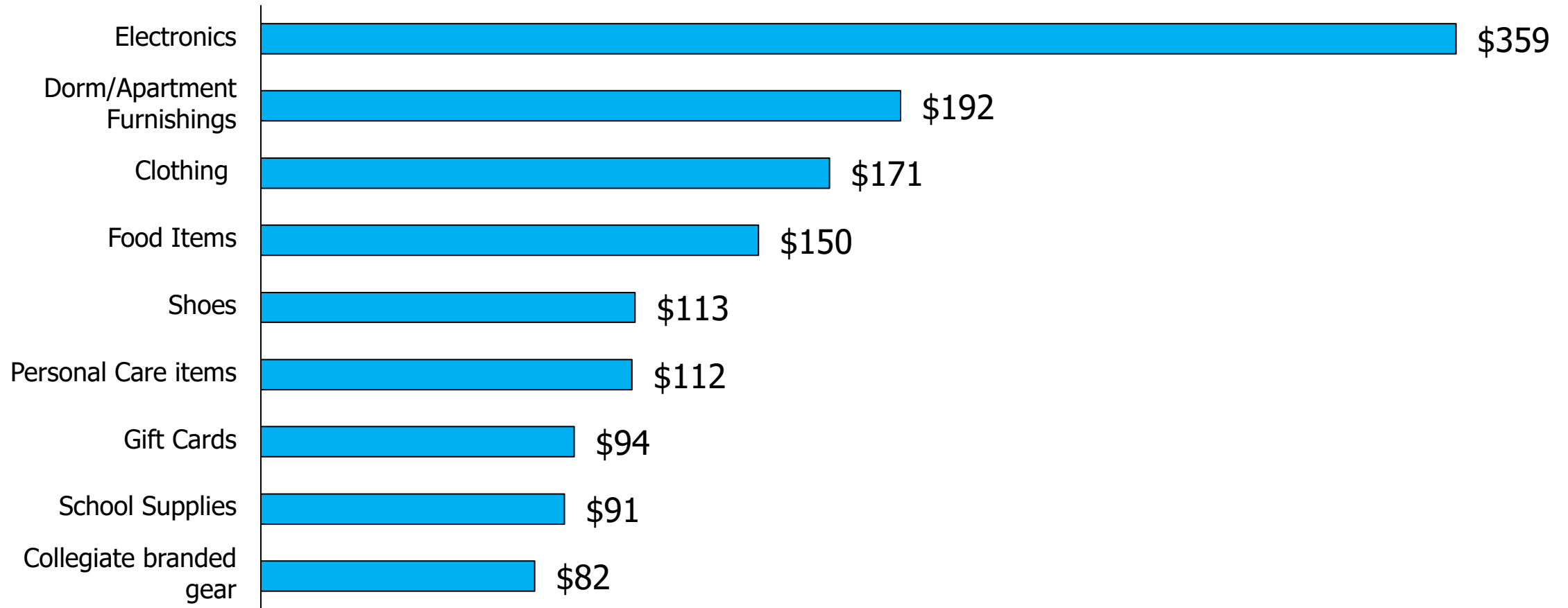
# Per Household Spending for Back-To-College is Expected to Reach Second Highest Record in 2024

Total Per Household Average Spending for Back-to-College



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

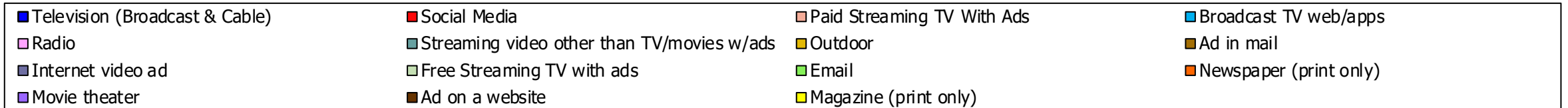
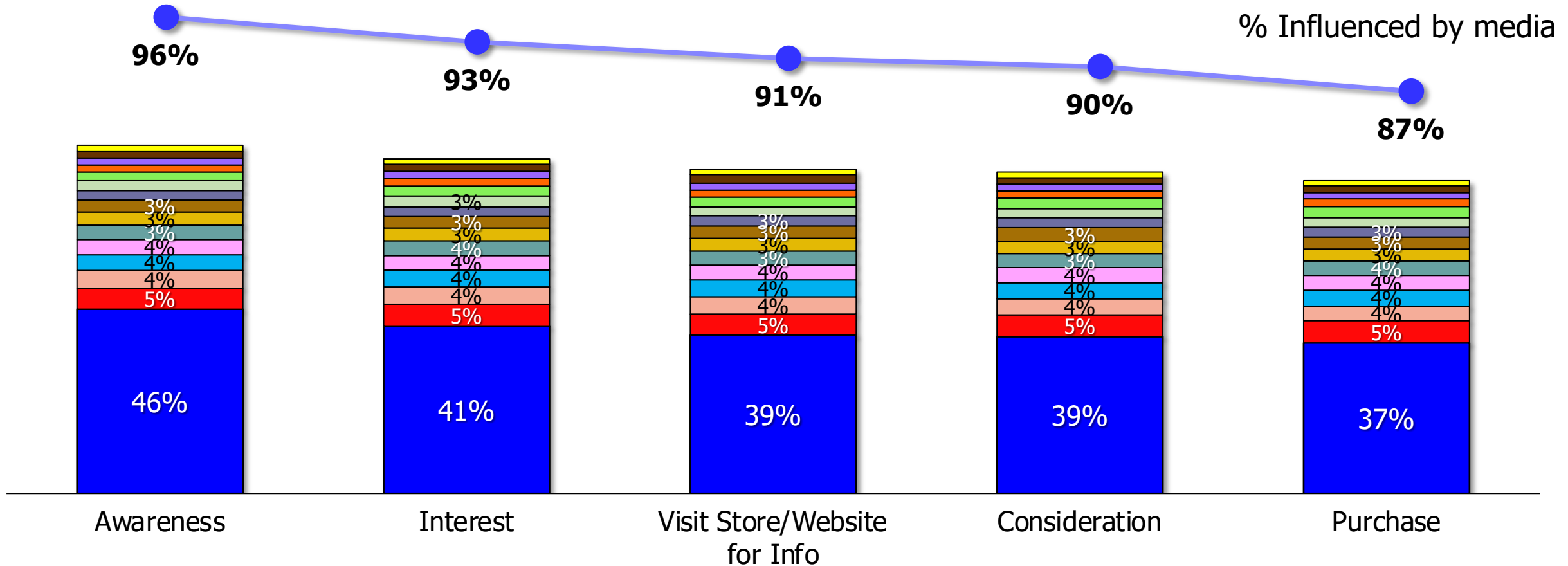
## Per Household Spending





# TV Advertising is Imperative to Influence Back-To-School Shoppers

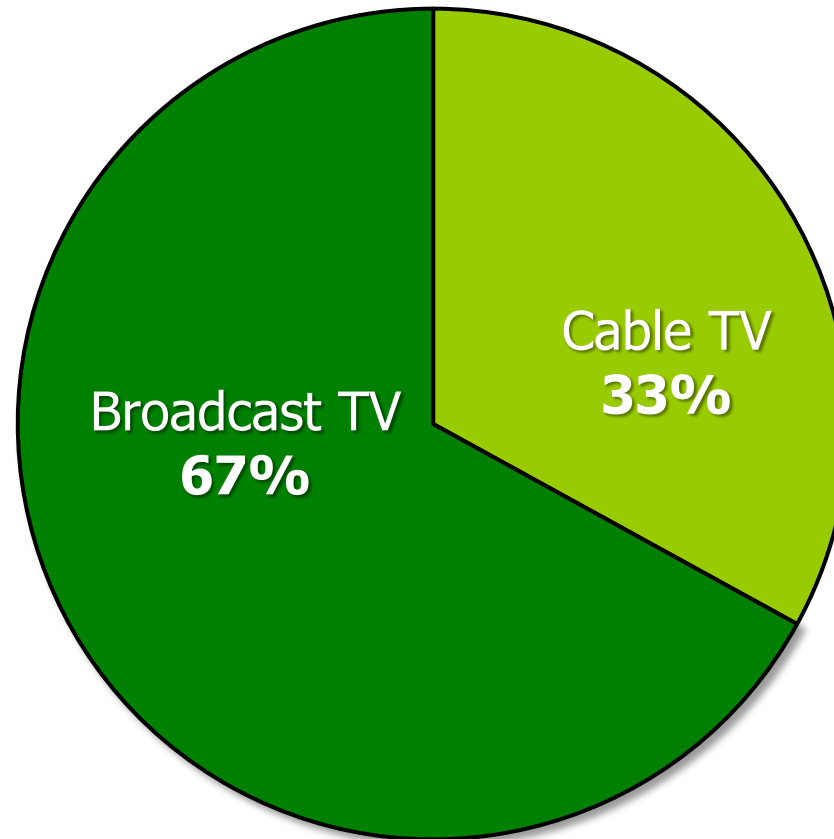
# What Influenced Consumers Most: Television



Source: GfK TVB Purchase Funnel 2024 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, Two-Thirds Picked Broadcast TV

All 8 Categories:



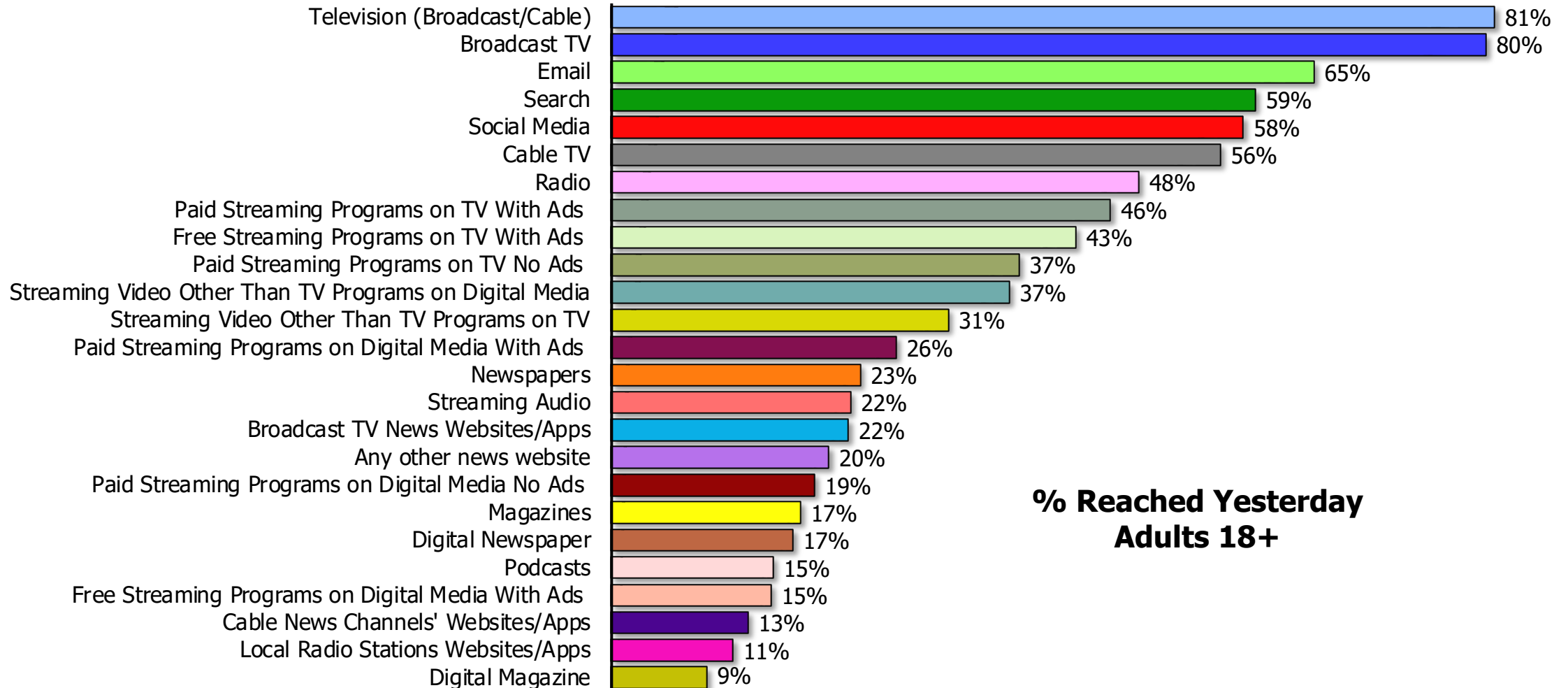
Source: GfK TVB Purchase Funnel 2024 A18+

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 46% who chose television as most important, 67% chose broadcast TV.

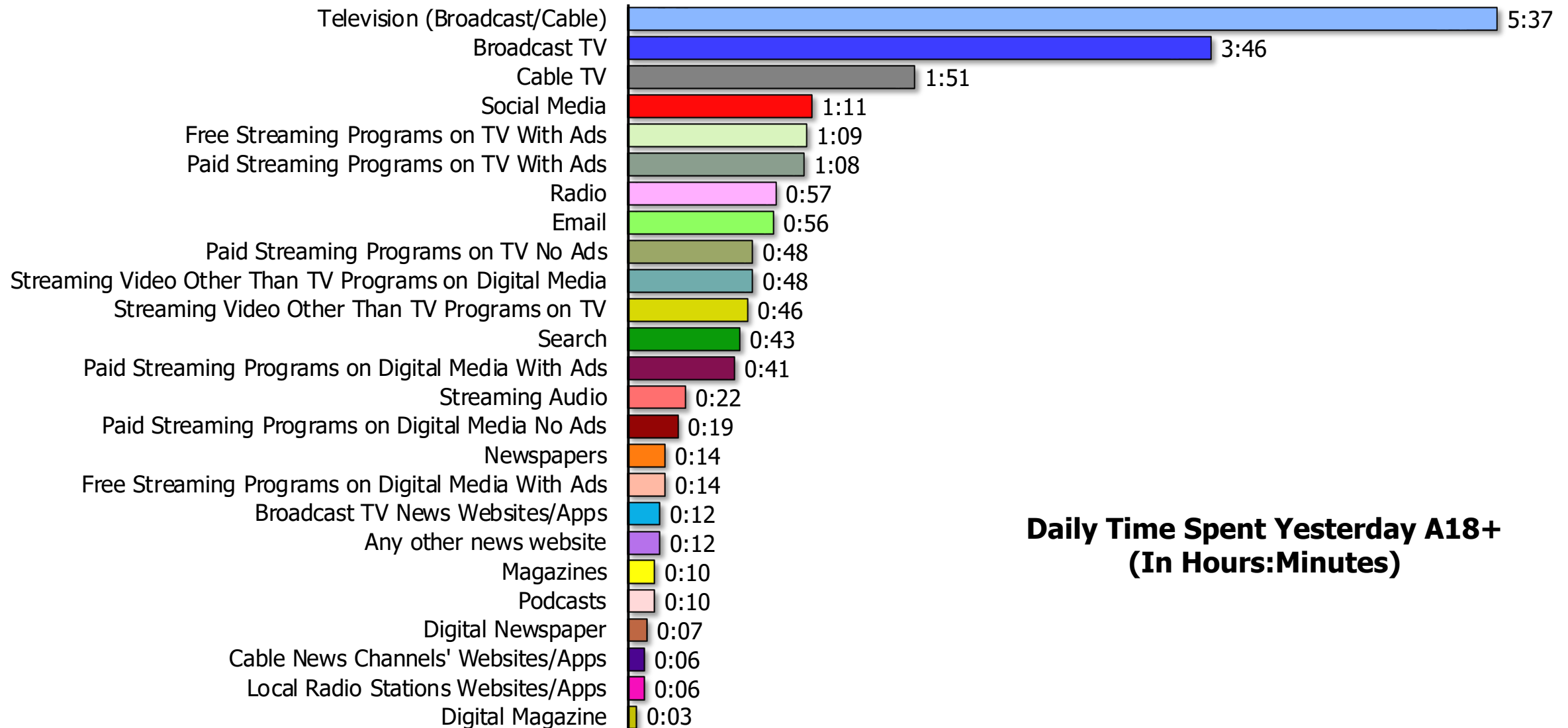
# TV Has Highest Reach of All Platforms Measured

## Broadcast Leads the Way



Source: GfK TVB Media Comparisons Study 2024. 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.

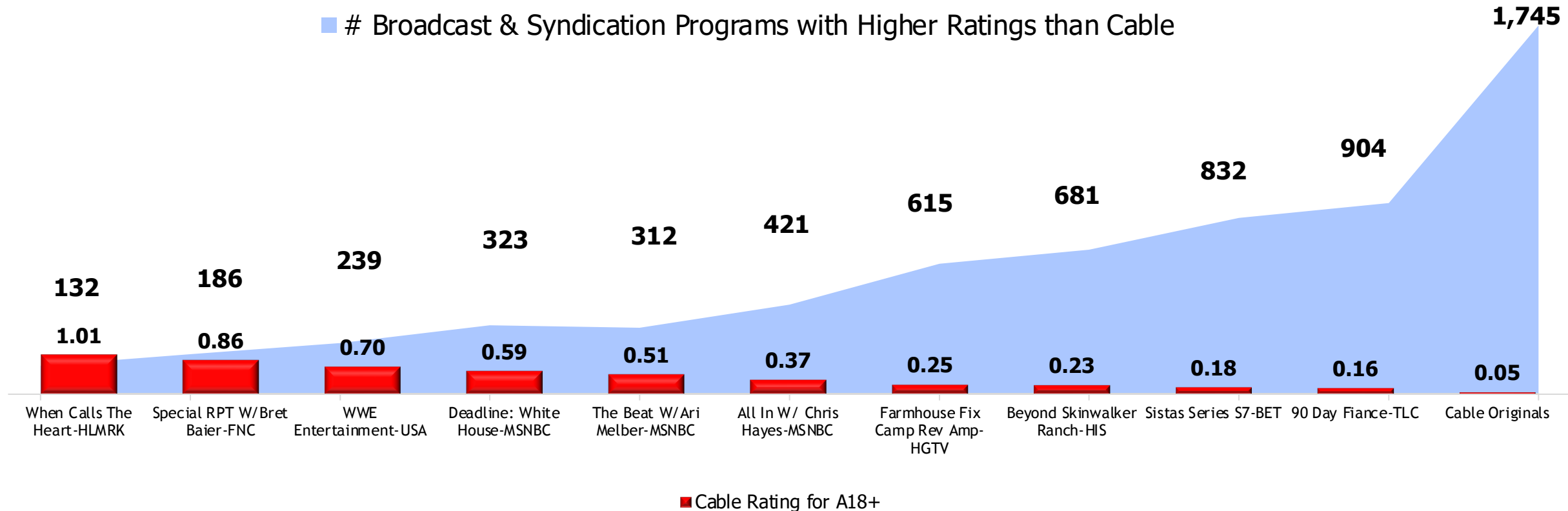
# People Spend the Most Time with Television



**Daily Time Spent Yesterday A18+  
(In Hours:Minutes)**



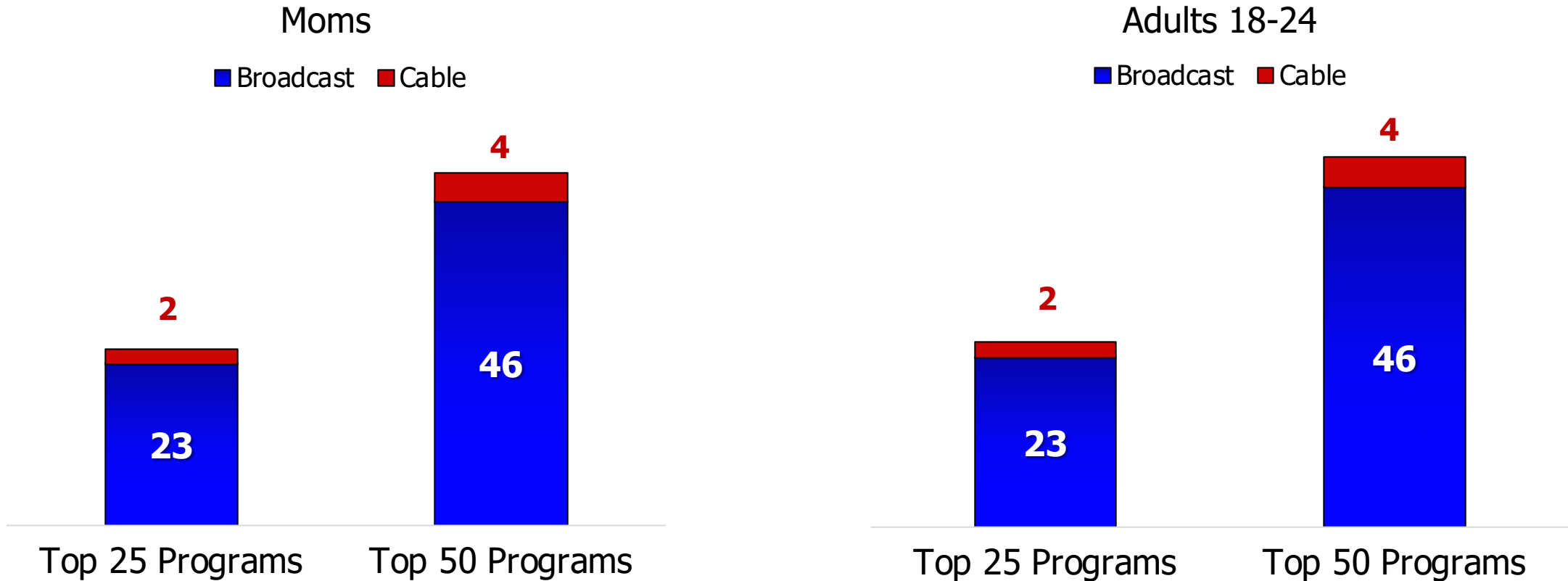
# Broadcast Programs During the Summer Far Outstrip Even Cable Originals



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 TV: Tops in Summer Ratings

# Of Top-Rated Programs

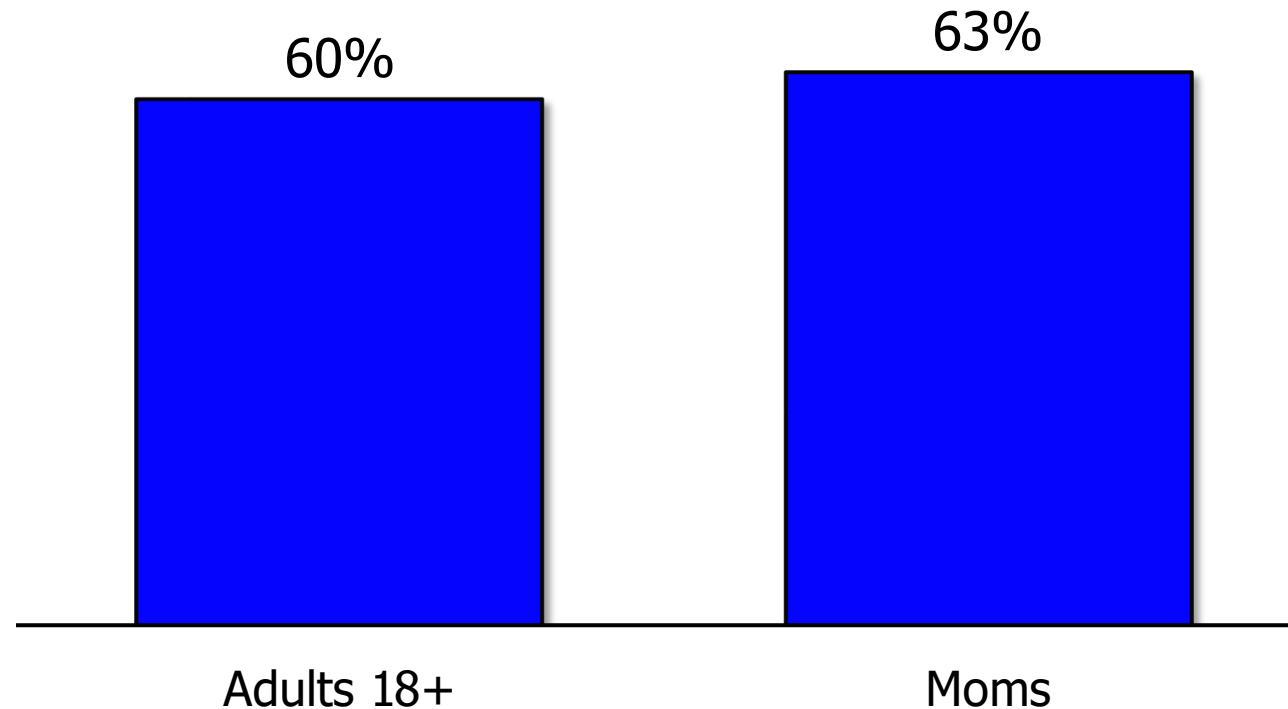


**Broadcast delivered 46 of the top 50 programs for Moms  
and 46 of the top 50 for A18-24**

# For Moms, Television Ads are Motivation to do Further Research Online

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

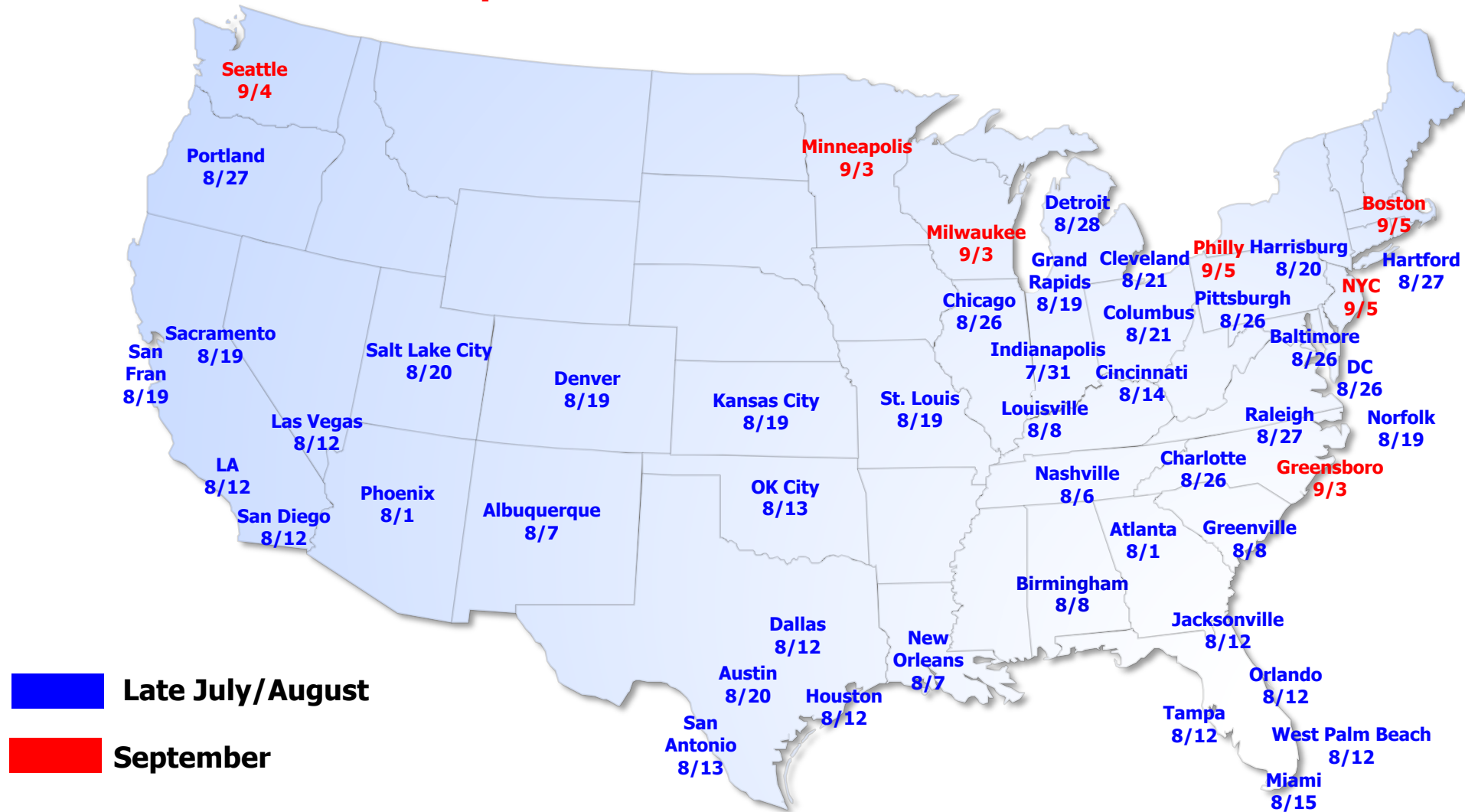
**Percent Yes**



# 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	9/5
National Media	No Geographic Flexibility		

## ***Local Broadcast***

Boston



Portland



Dallas

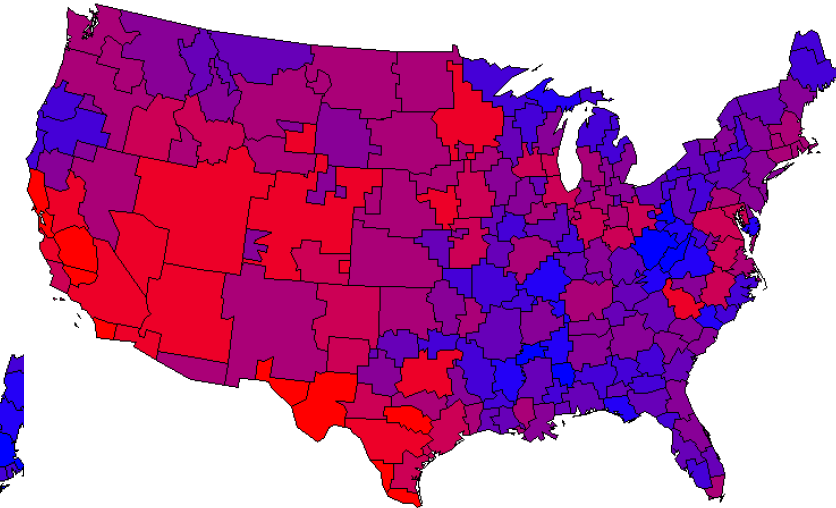
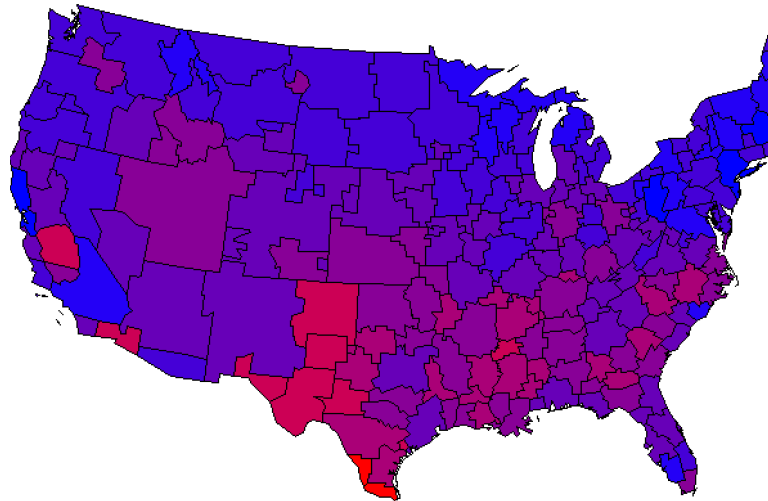
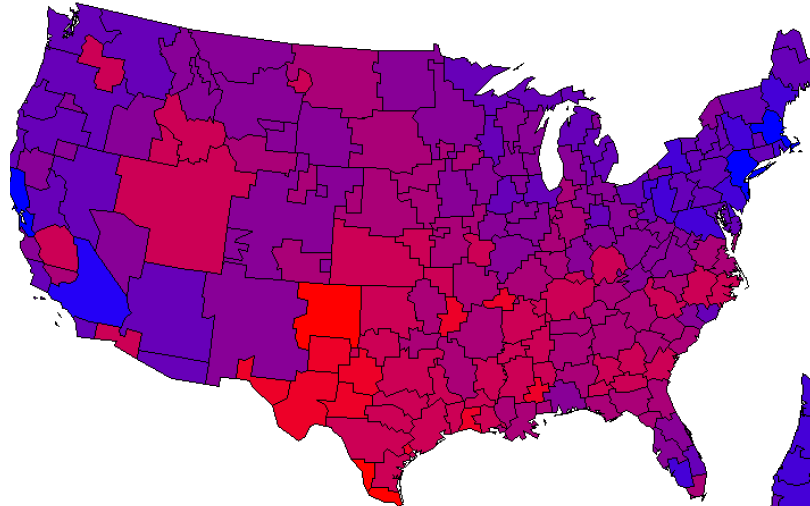


Indianapolis



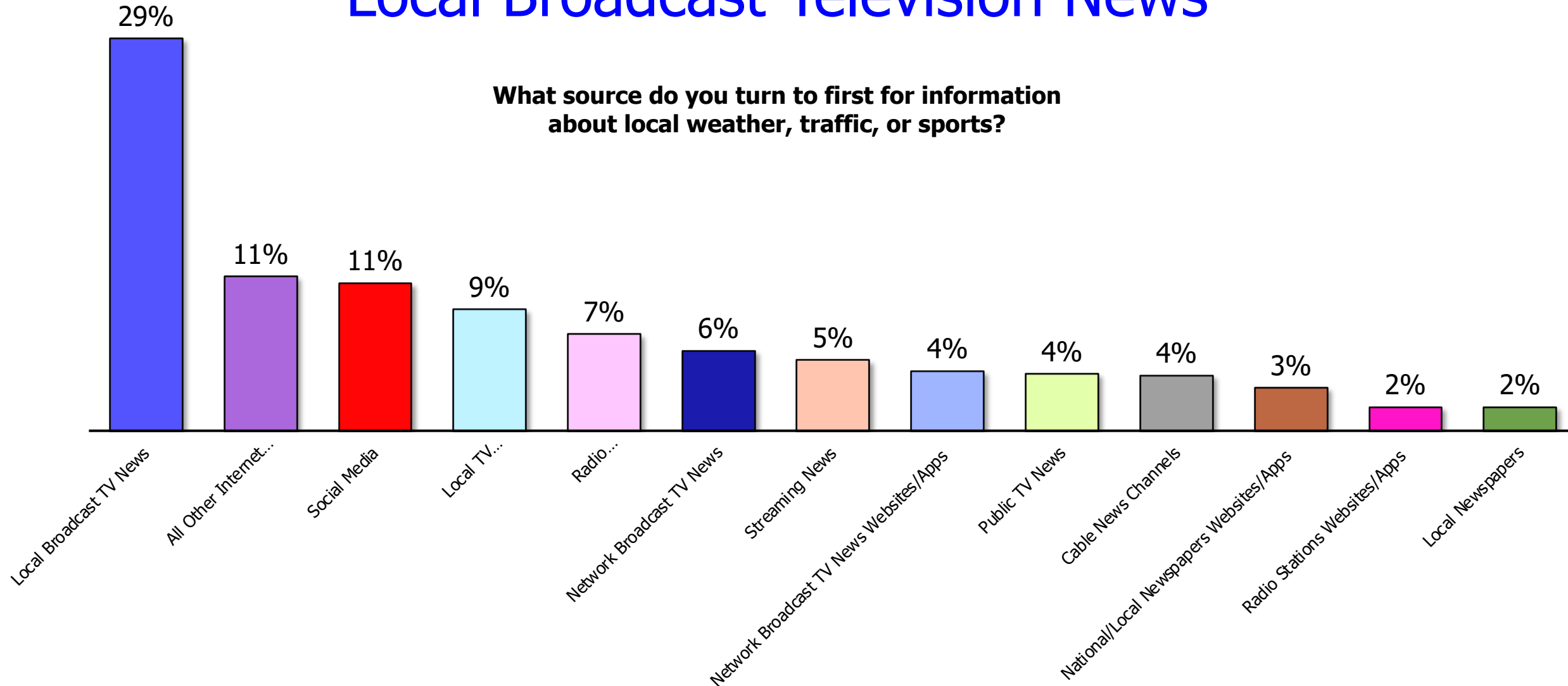
# Cover Each Company's Strong Markets with Local Broadcast

Walmart 



 The Redder the better- High Index

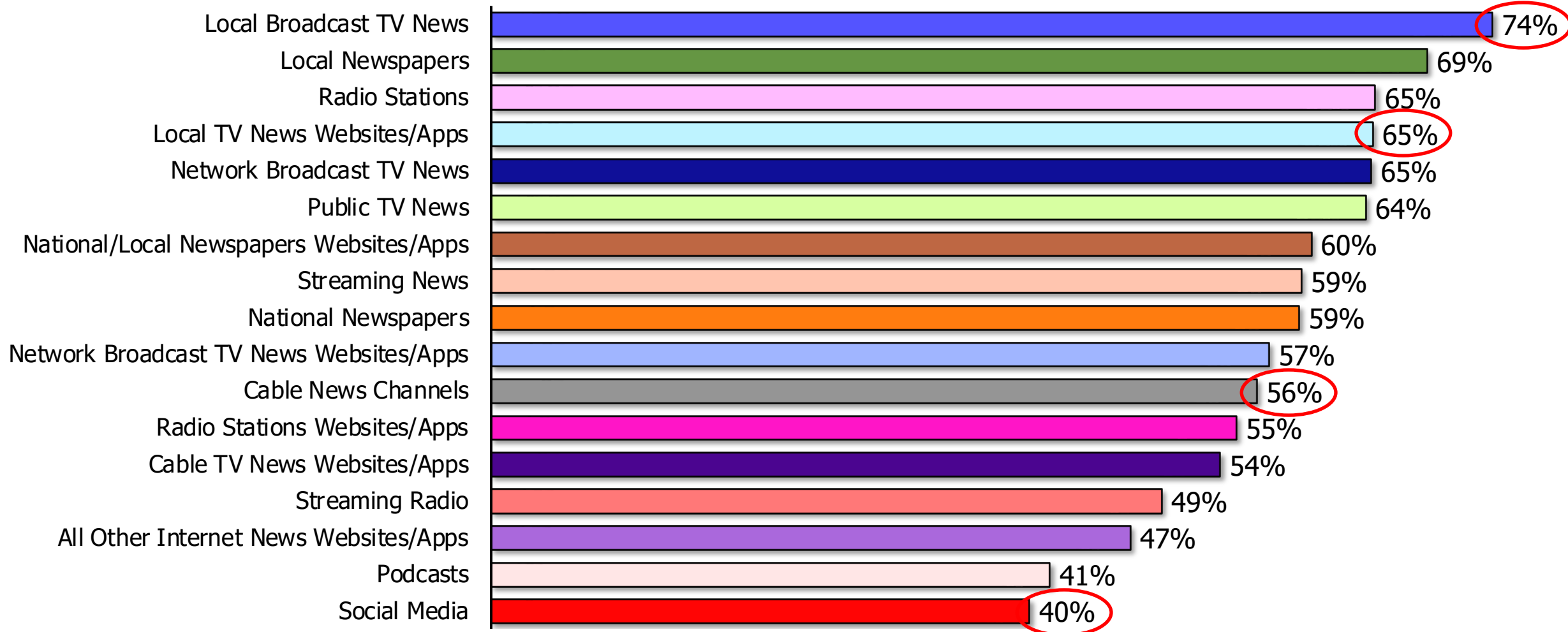
# The Primary Source for Local Traffic, Weather & Sports: Local Broadcast Television News



Source: GfK TVB Media Comparisons Study 2024. 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.

# Local Broadcast Television News: #1 For Trust

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



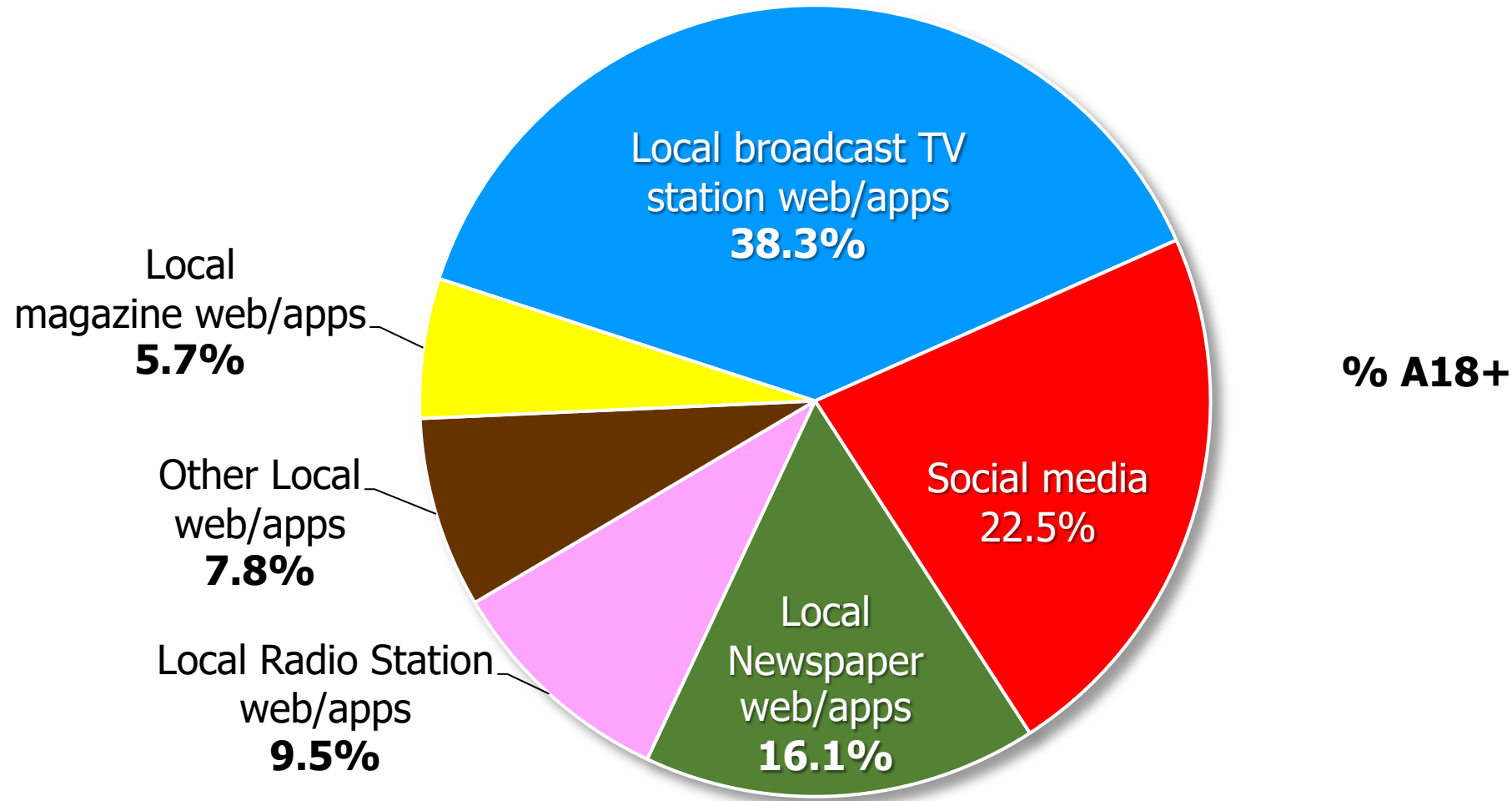
Source: GfK TVB Media Comparisons Study 2024. Persons 18+. Agree Strongly or Agree Somewhat.

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.

Streaming news includes programs like ABC News Live, NBC News Now, Live Now from Fox on Roku, Tubi, etc.

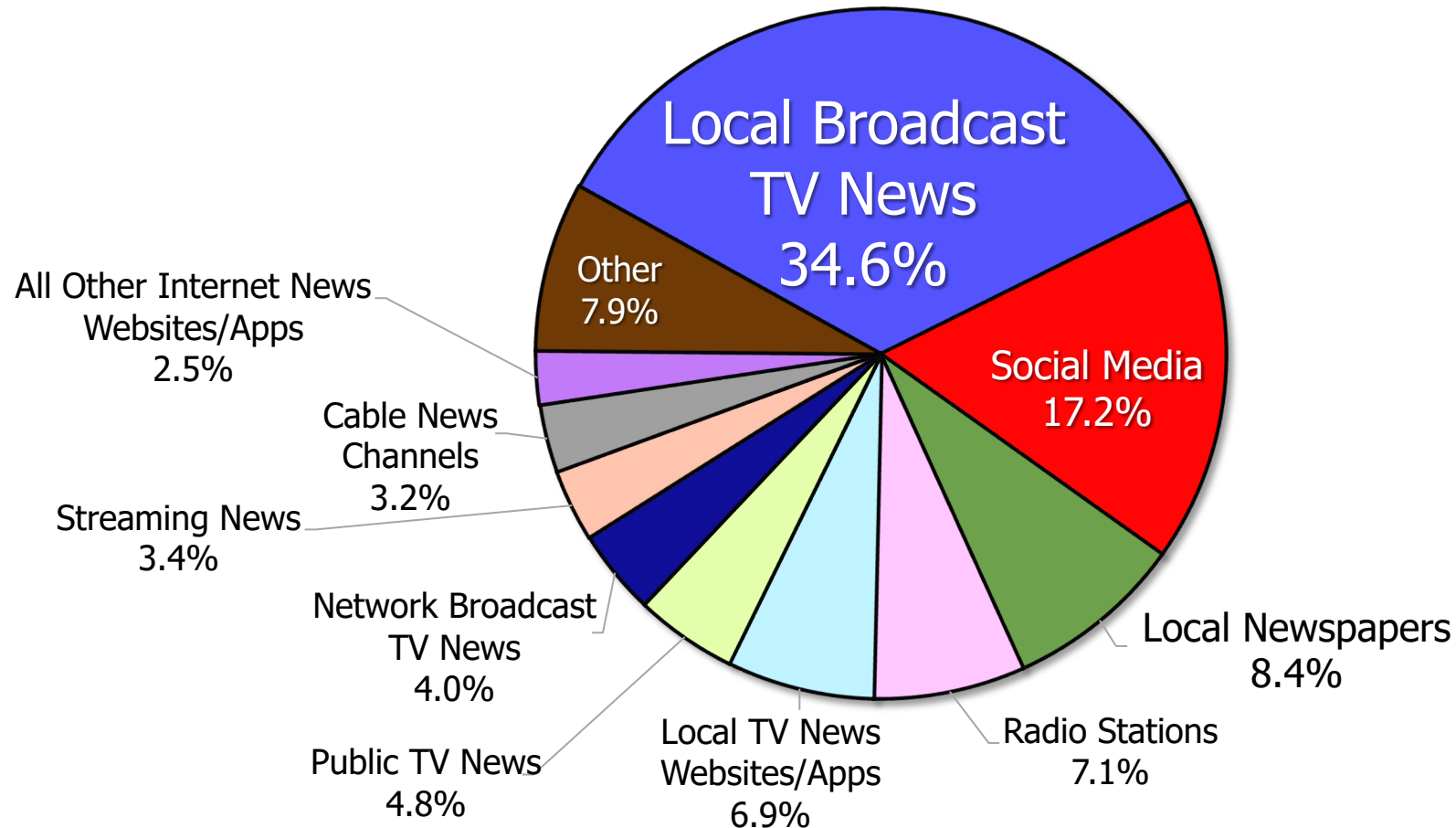
# Local Television Websites/Apps Most Preferred

**“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?**

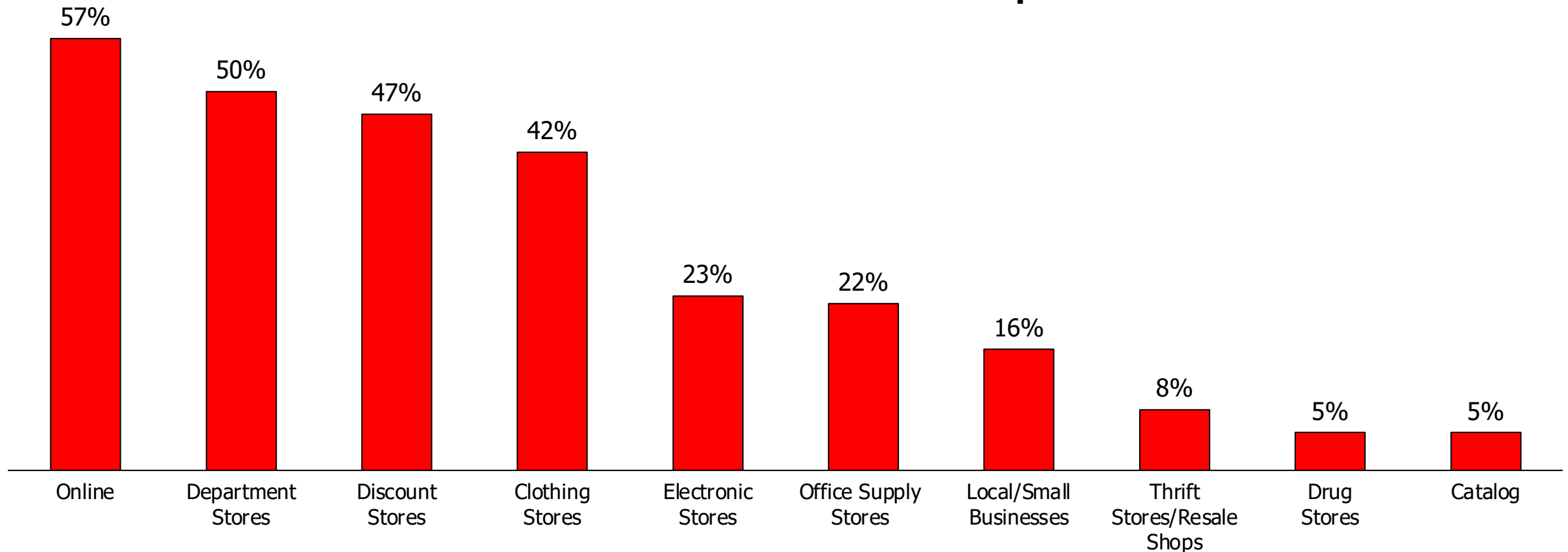


Source: GfK TVB Media Comparisons Study 2024. Persons 18+. Includes only those who chose a media.  
Q08 - And, which source of news do you feel is the most involved in your community?  
Streaming news includes programs like ABC News Live, NBC News Now, Live Now from Fox on Roku, Tubi, etc.

However Consumers Shop,  
TV Advertising is Key

# When Shopping for **Back-to-School**, 57% Will Shop Online This Season

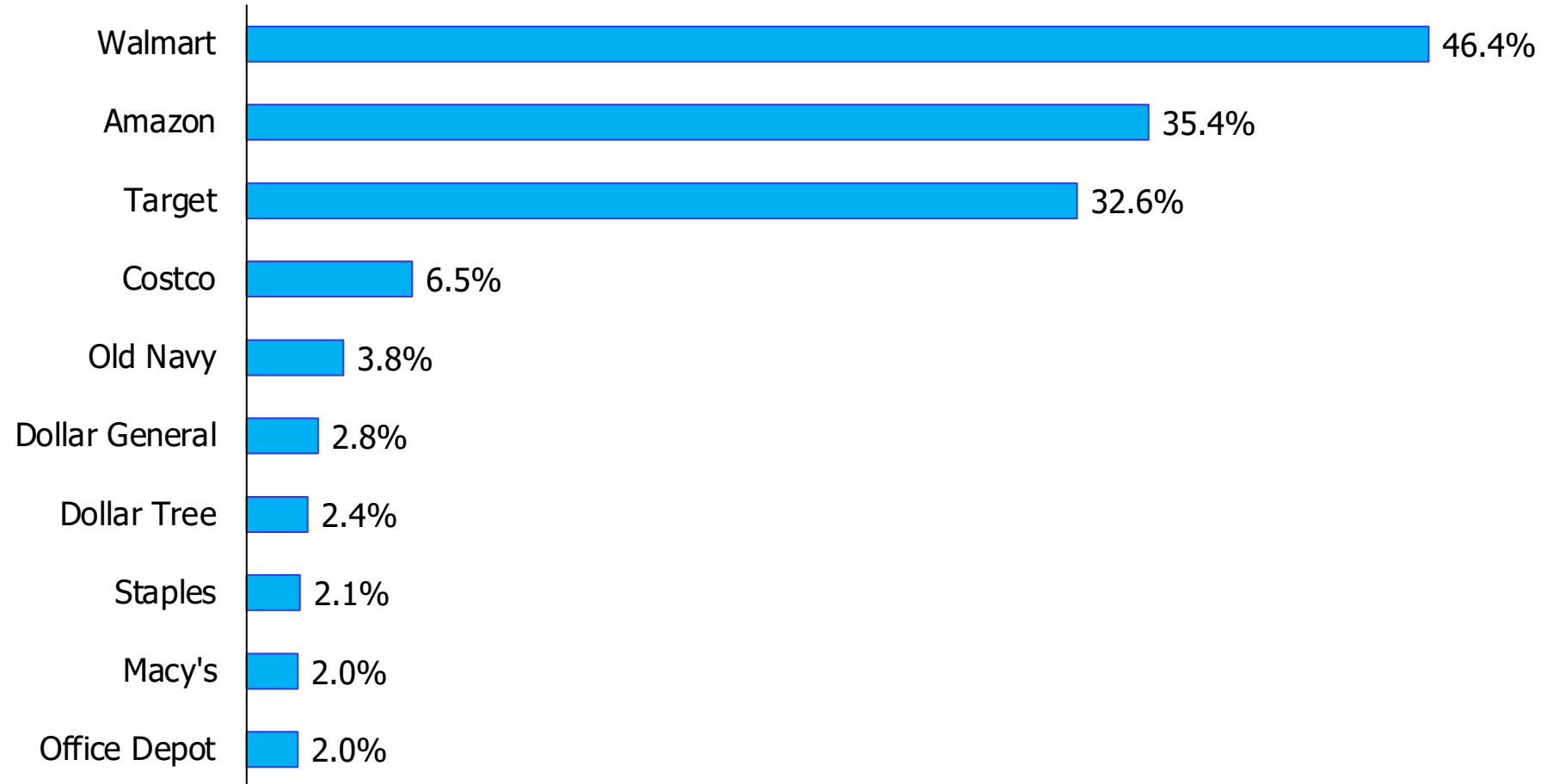
## Where Consumers Plan to Shop





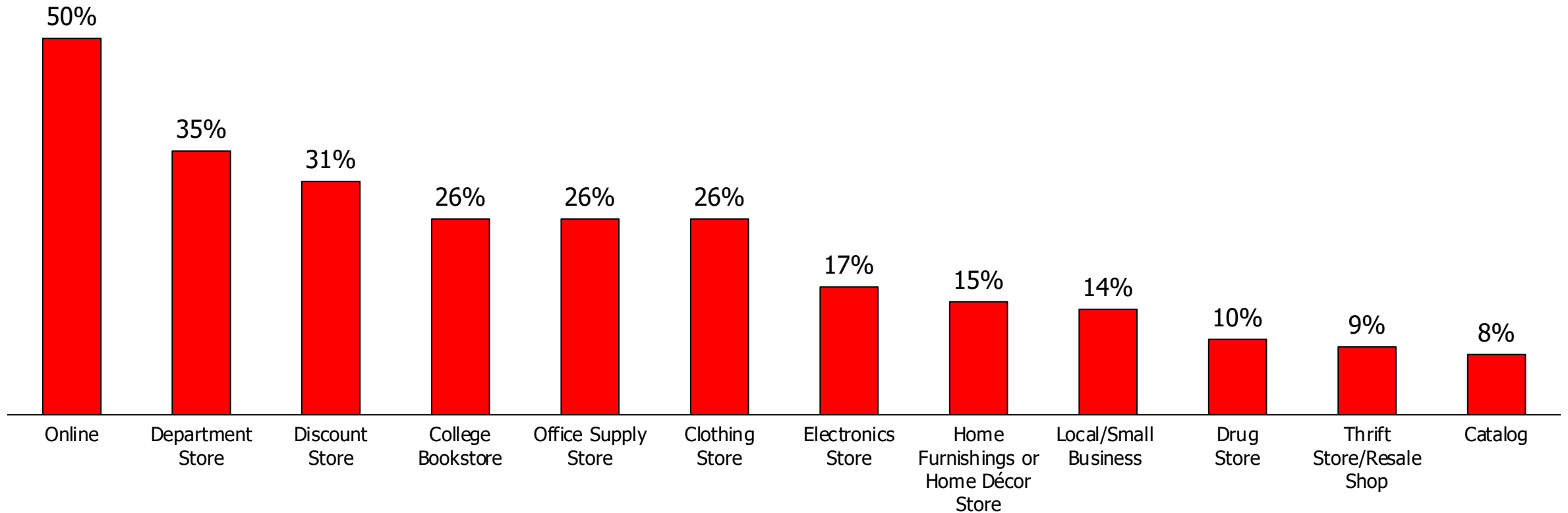
# Walmart, Amazon, and Target Retain Their Spots as Parent Favorites

% of respondents who selected retailer in their top 3 favorites



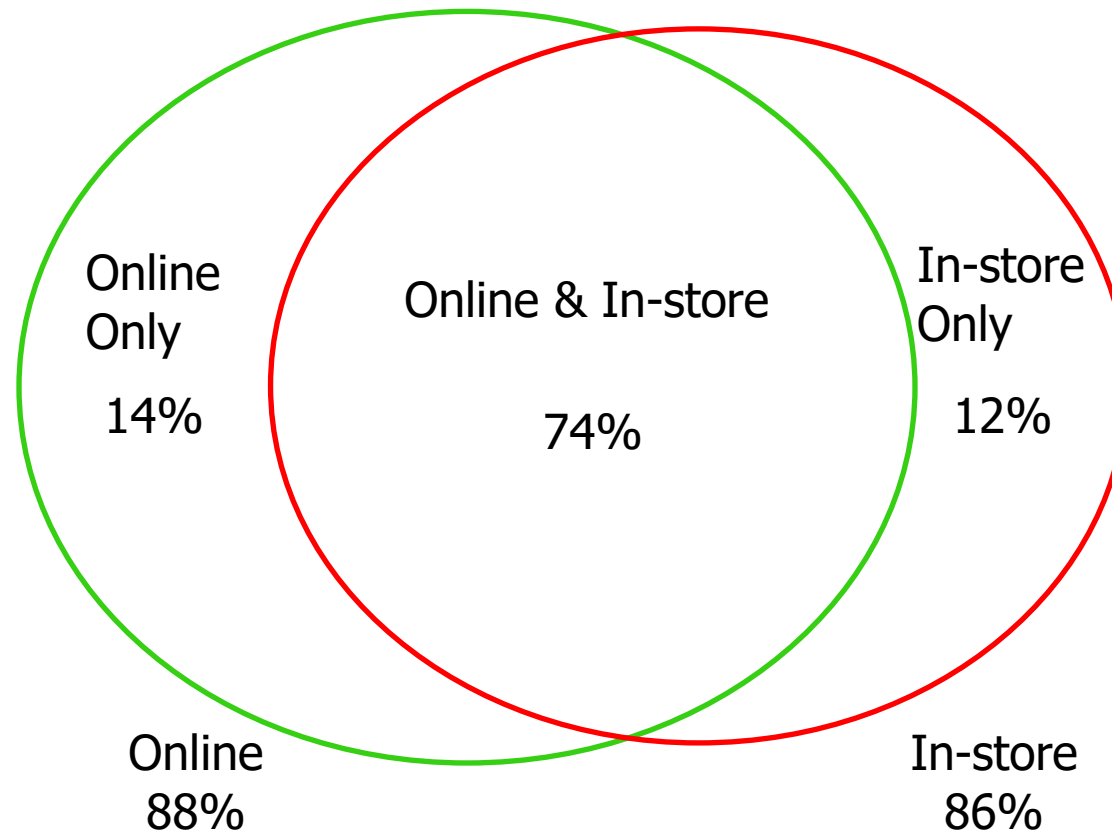
# When Shopping for **Back-to-College**, 50% Will Shop Online This Season

## Where Consumers Plan to Shop



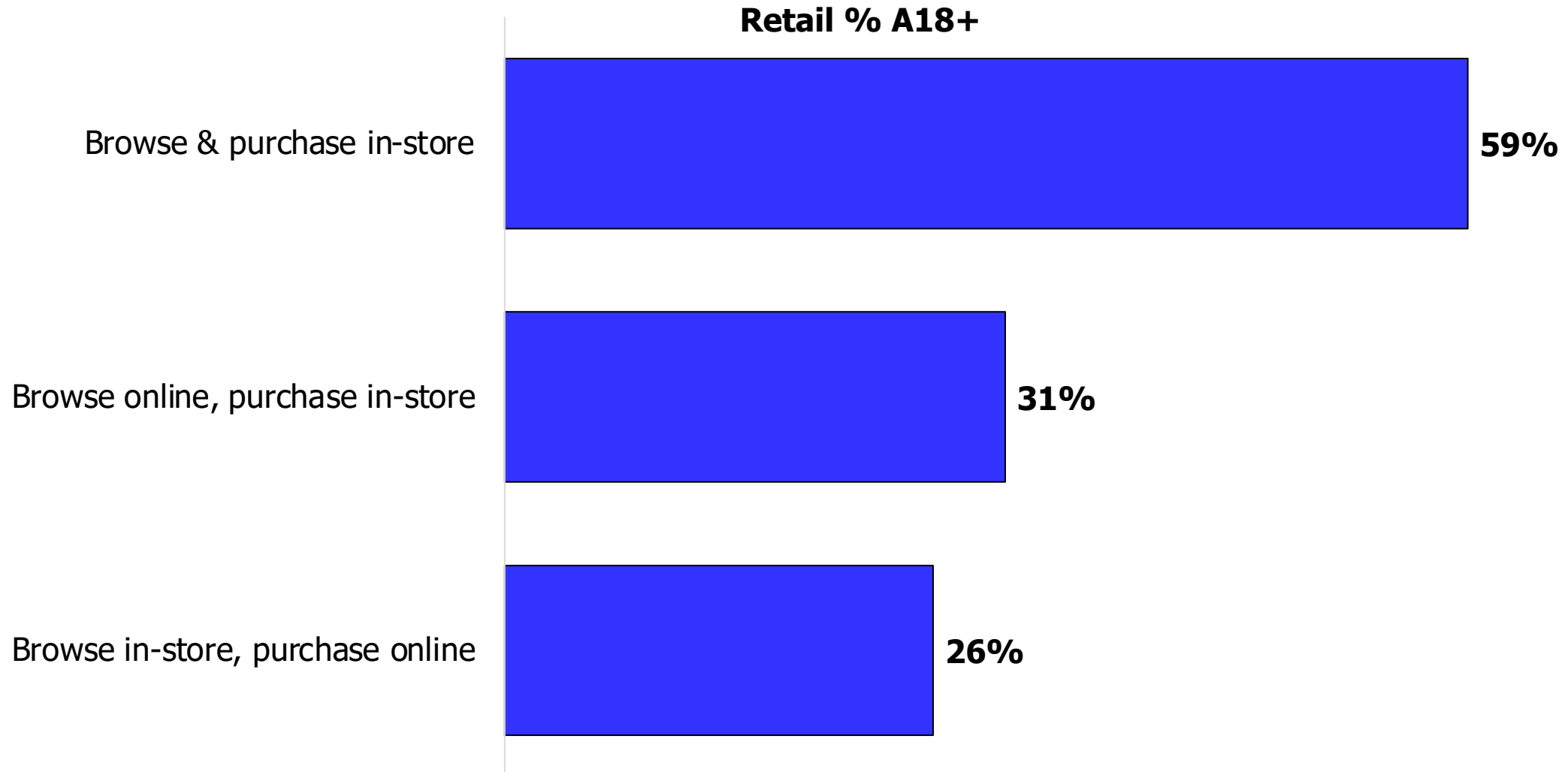
# 74% of Retail Consumers Shopped Both In-Store & Online During the Holiday Season

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



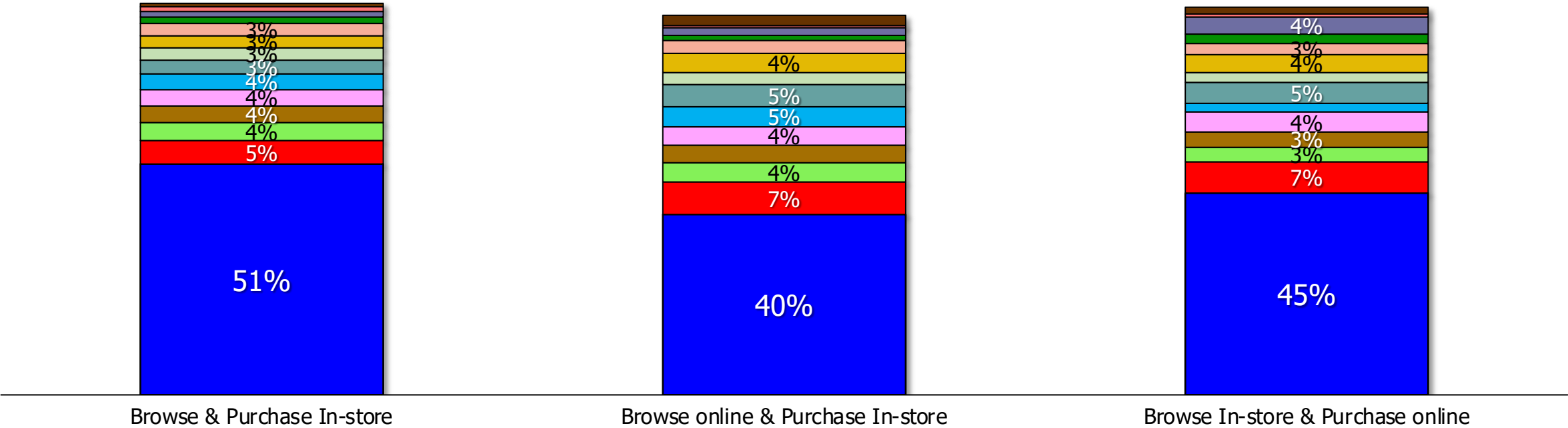
# Holiday Season: Shopping Activity at Retail Locations

**6 out of 10 respondents browsed AND purchased in-store.**



# What Influenced Consumers Most For **In-store** Retail: Awareness

% A18+ Retail



- Television (Broadcast & Cable)

■ Ad in mail

■ Streaming video other than TV/movies w/ads

■ Paid streaming TV w/ads

■ Internet display/banner ad
- Social media

■ Radio

■ Free streaming TV with ads

■ Internet search

■ Ad on a website
- Email

■ Broadcast TV web/apps

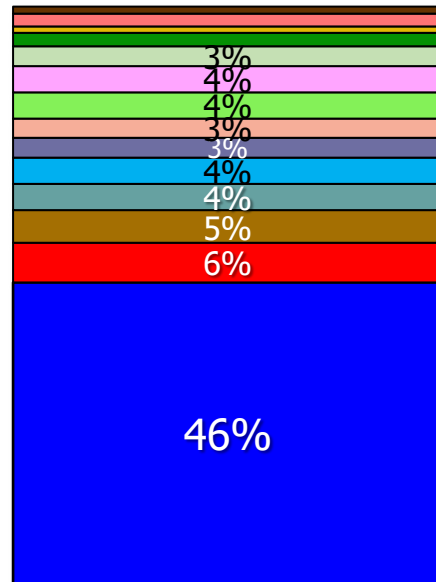
■ Outdoor

■ Internet video ad

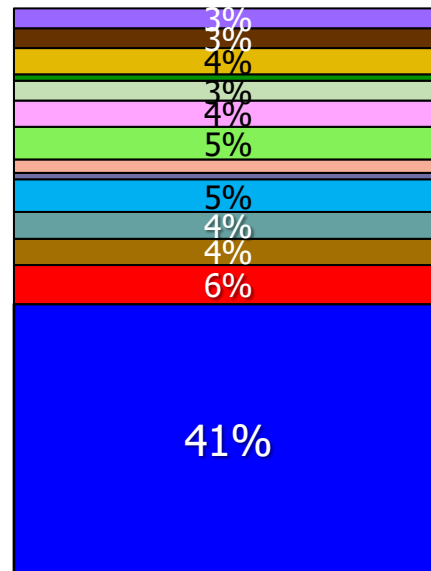
Source: GfK TVB Purchase Funnel 2024 Retail Category;  
QA4 Most important for media with at least 1 funnel stage at 2%+ shown; 2%, 1%, & 0% not shown/labeled.

# What Influenced Consumers Most For **Online** Retail: Awareness

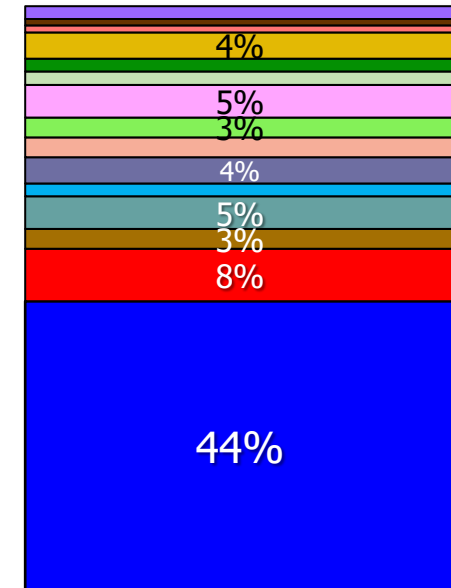
% A18+ Retail



Browse & Purchase Online



Browse Online,  
Purchase In-store

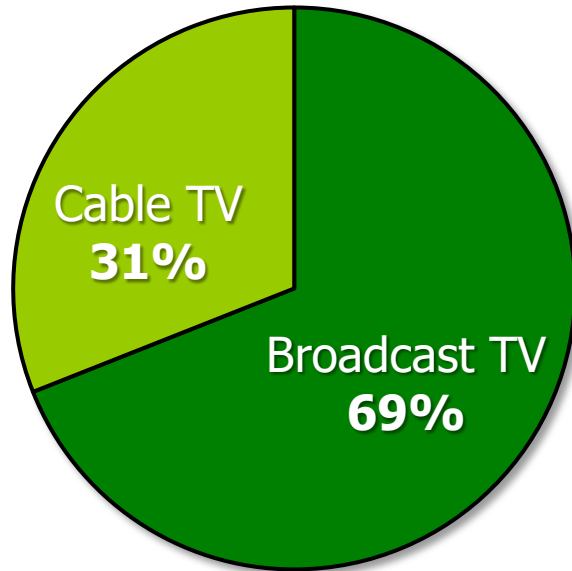


Browse in-store,  
Purchase Online

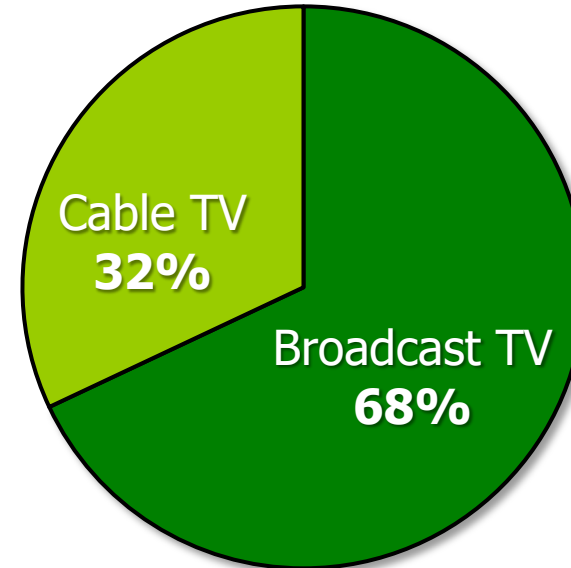
- |  |                         |                     |
|--|-------------------------|---------------------|
| ■ Television (Broadcast & Cable)             | ■ Social media          | ■ Ad in mail        |
| ■ Streaming video other than TV/movies w/ads | ■ Broadcast TV web/apps | ■ Internet video ad |
| ■ Paid streaming TV w/ads                    | ■ Email                 | ■ Radio             |
| ■ Free streaming TV w/ads                    | ■ Internet search       | ■ Outdoor           |
| ■ Internet display/banner ad                 | ■ Ad on a website       | ■ Movie theater     |

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

In-Store Retail



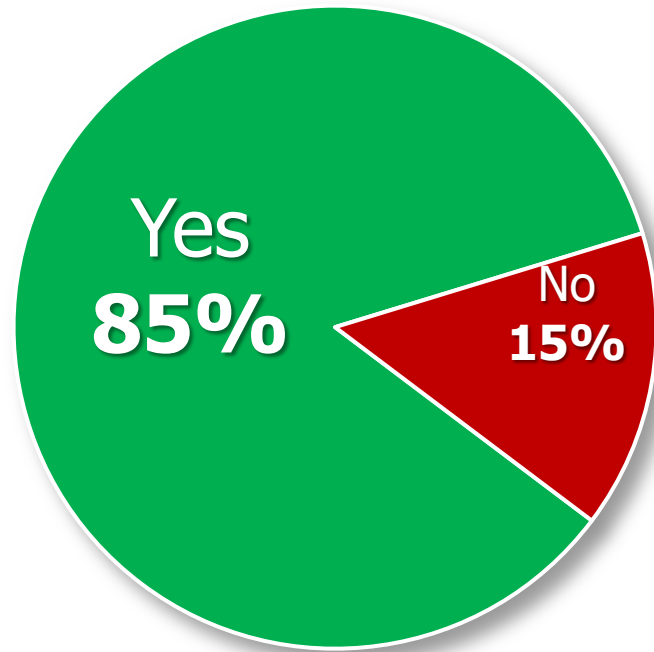
Online Retail



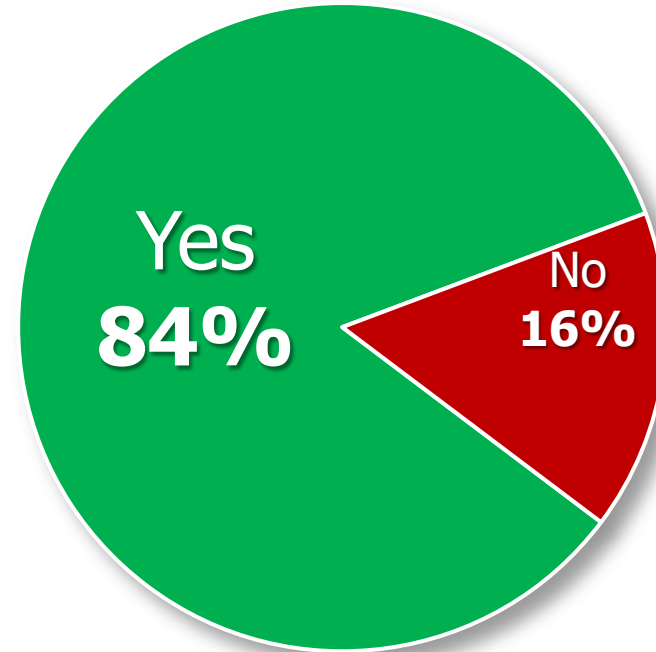
Source: GfK TVB Purchase Funnel 2024 In-store & Online retail category A18+  
QA4 "Thinking about the ads you saw/heard for the categories, which advertising media made you most aware of the category?"  
How to read: Of those who chose television as most important for awareness, 68% chose broadcast TV.

# "Have TV ads influenced your search selections?"

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



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

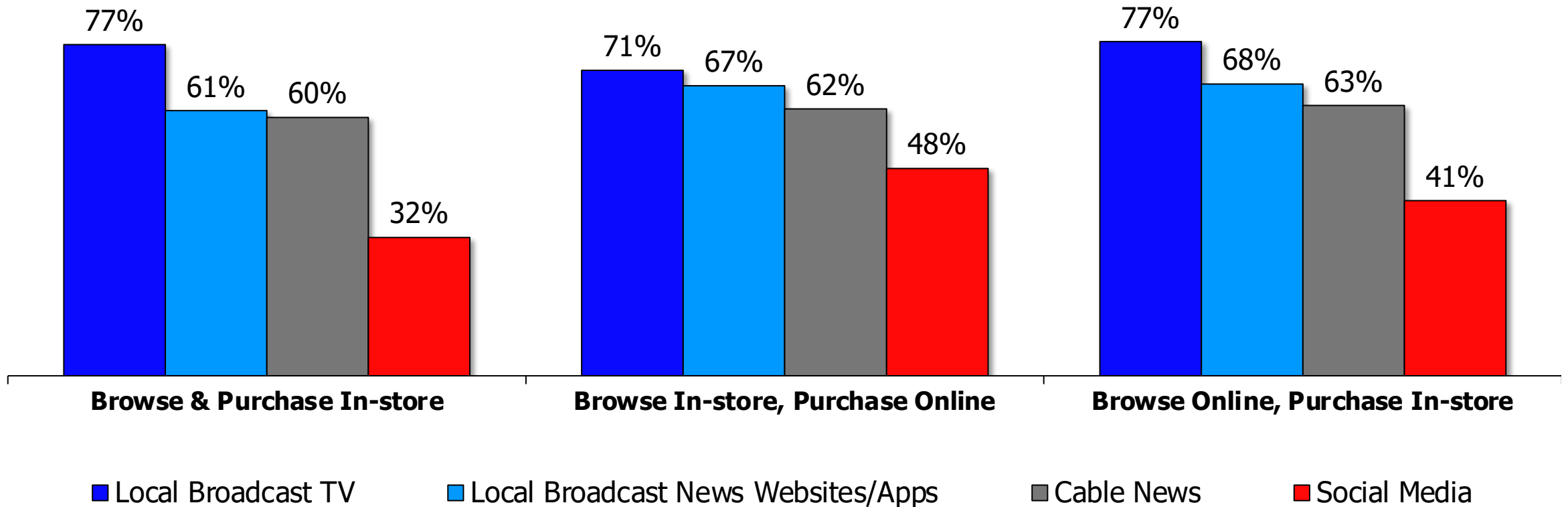


Source: GfK TVB Purchase Funnel 2024 In-store/online retail category A18+  
QA10 "When doing an online search, how often, if at all, have TV ads you have seen influenced you in some ways in your search?" (Yes = combination of Every time, Most of the time & Sometimes).



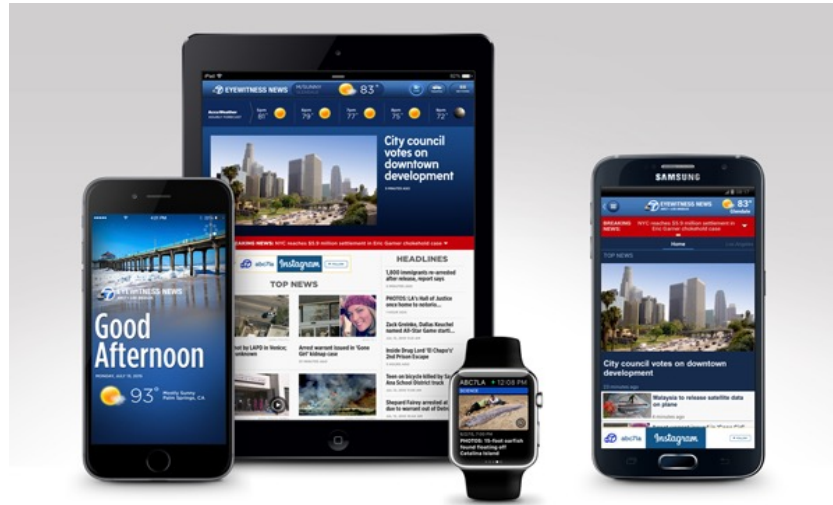
# Regardless of Physical Retail Methods, Shoppers Highly Trust Local TV Assets

**Retail  
% A18+ Agreeing**



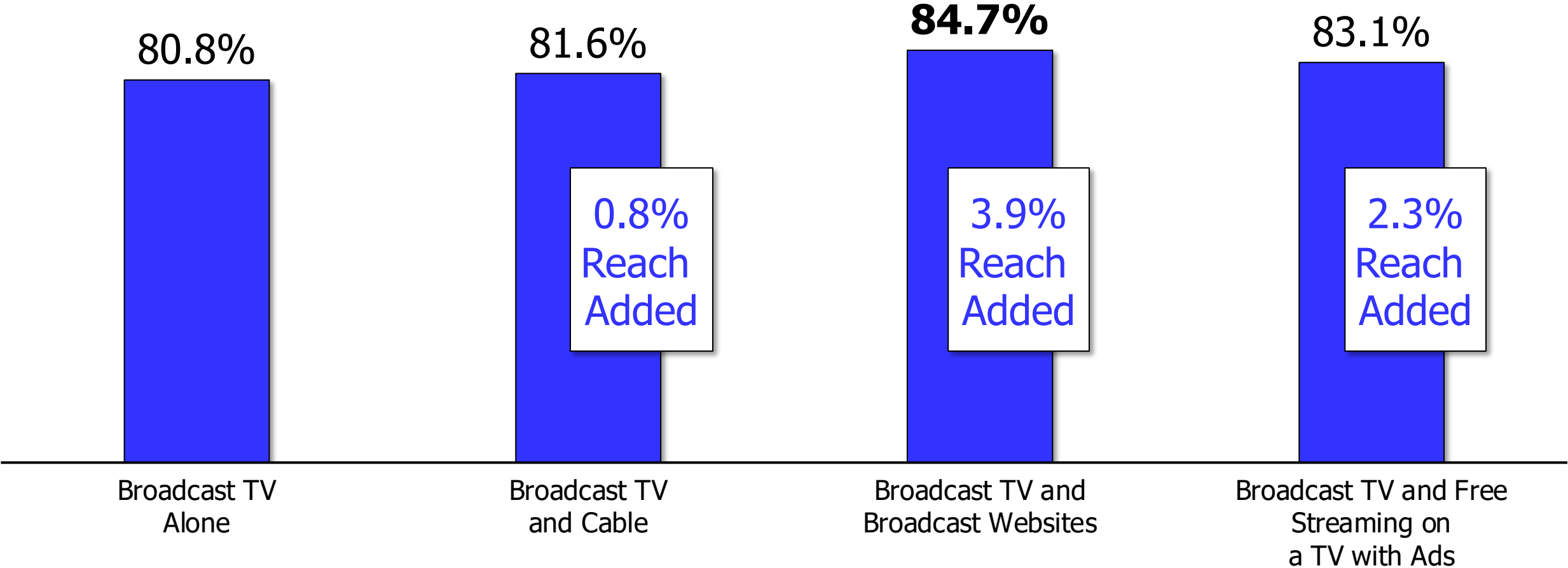
Source: GfK TVB Purchase Funnel 2024 In-store retail category, A18+  
B2 "I trust the news I see/hear on this media source." (Agree Strongly + Agree Somewhat).

# Broadcast TV Websites/Apps Provide Multi-platform Opportunities



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

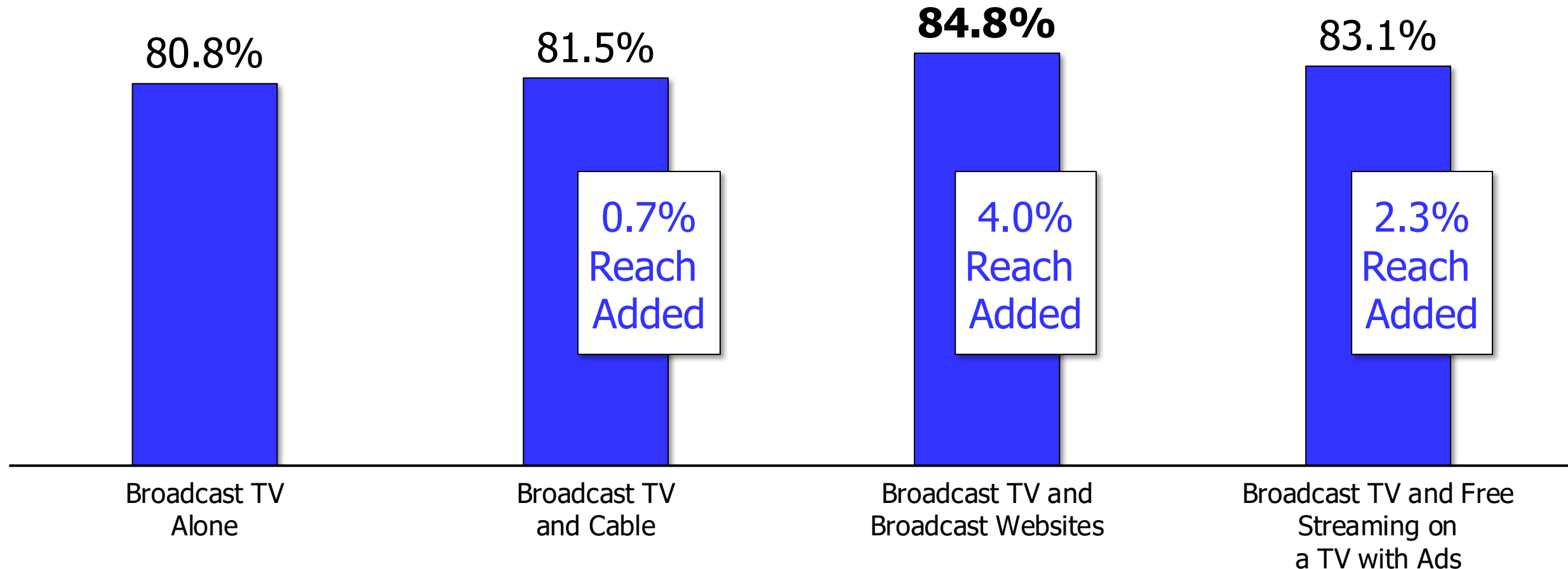
A18+ Shopped **in-store** in the past year



Source: GfK TVB Media Comparisons Study 2024. M-S 4A-2A. Persons 18+ Shopped in-store in the past year.

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

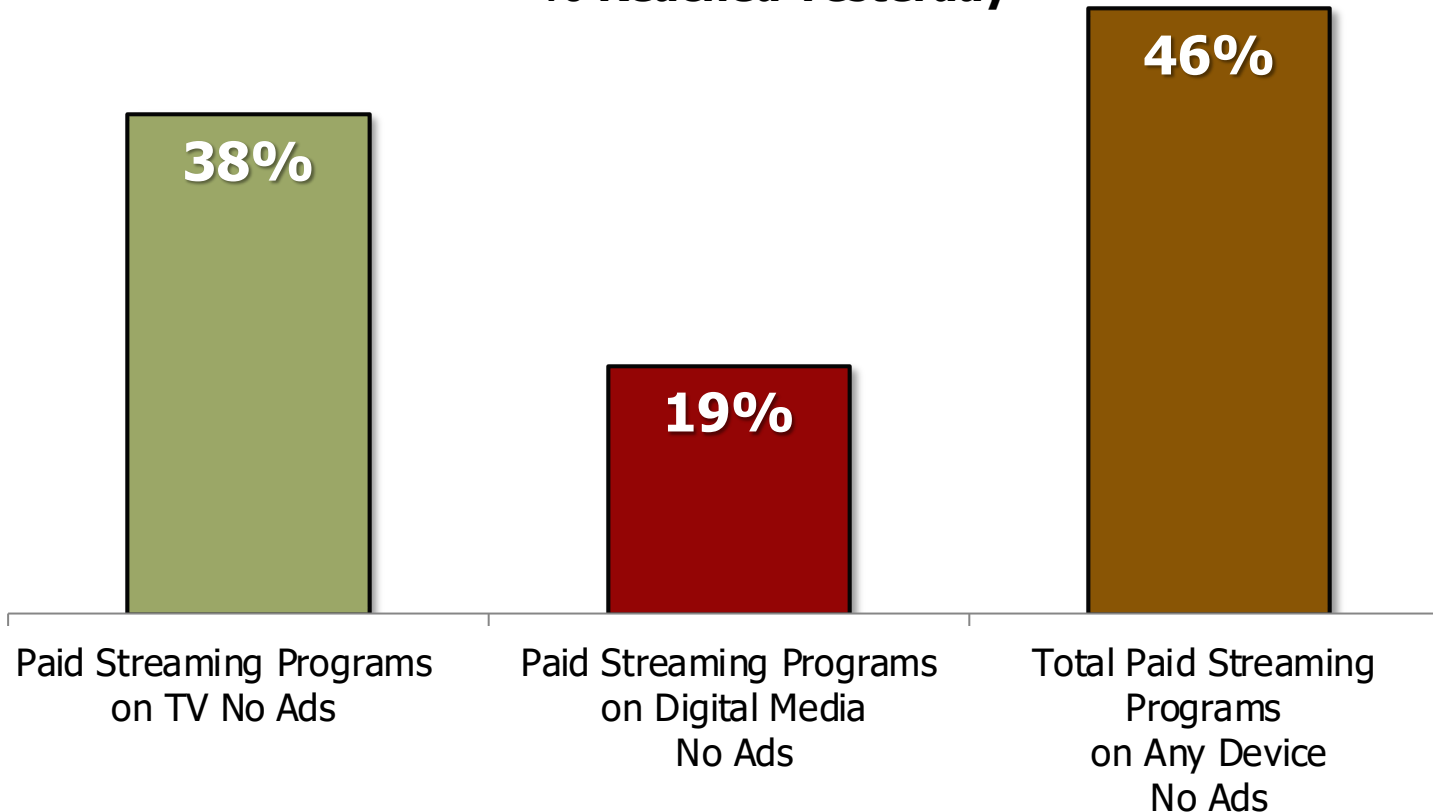
**A18+ Shopped online in the past year**



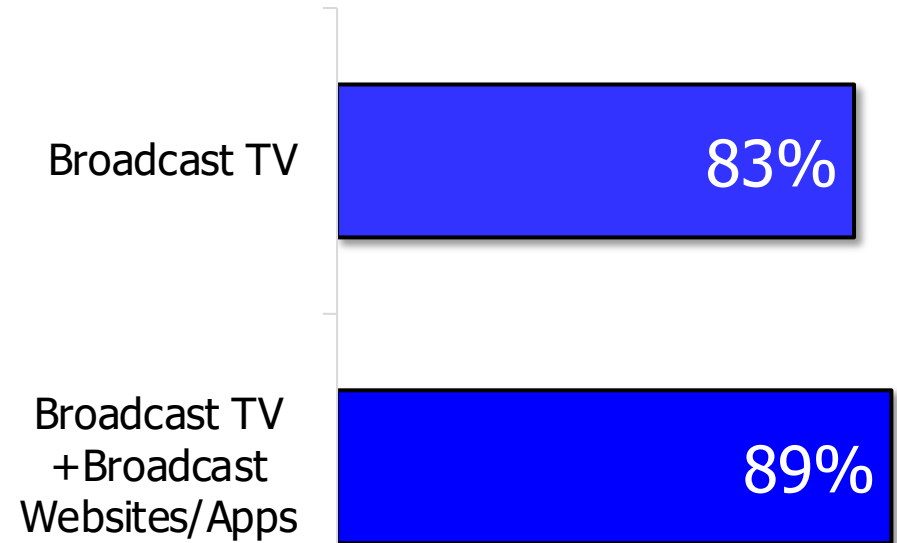
# Broadcast TV Assets Can Reach Those Who Stream Programming on Ad-Free Platforms

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

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

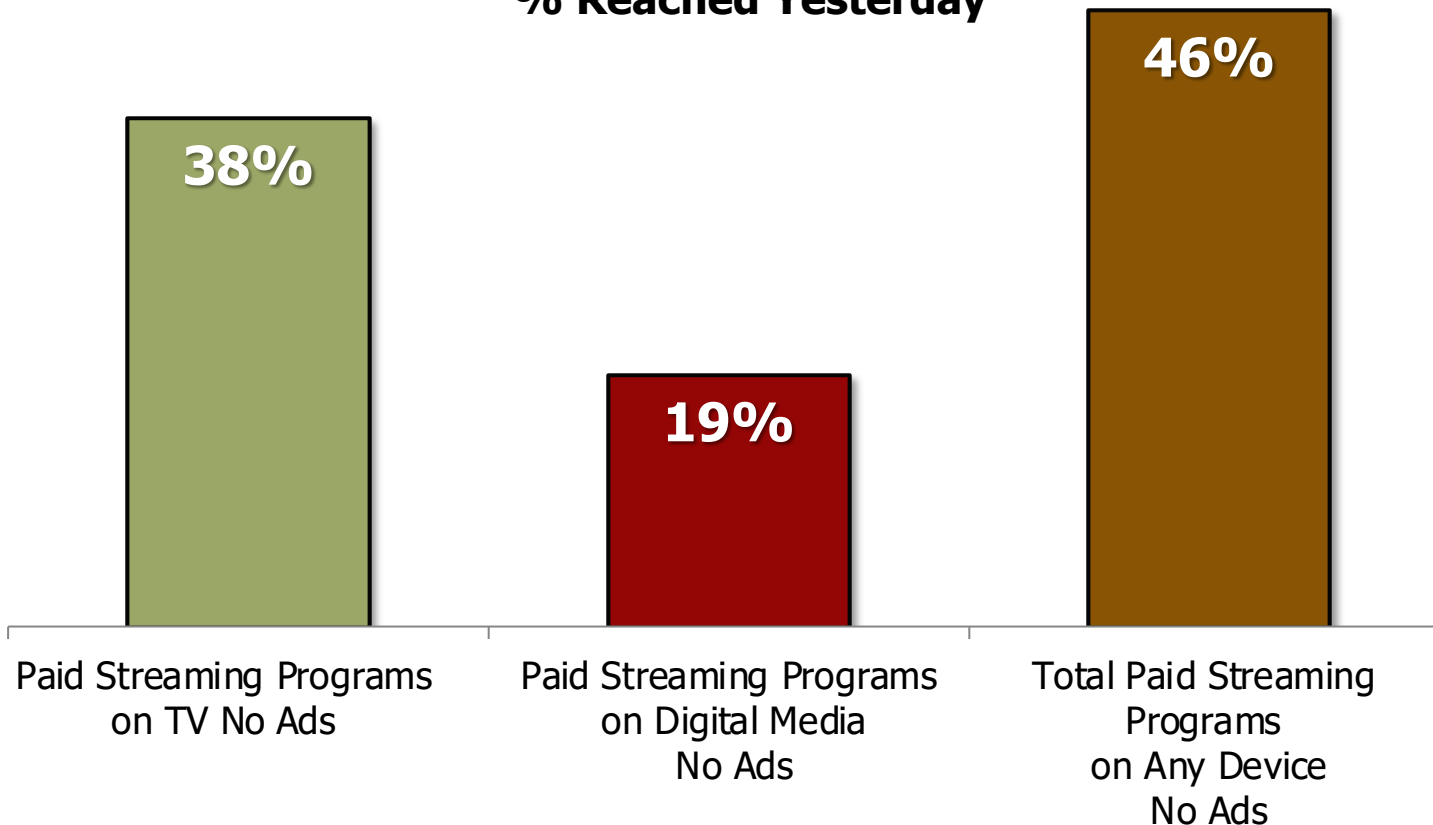


**In-Store Retail Shoppers  
% Reach of Streamers with No Advertising**

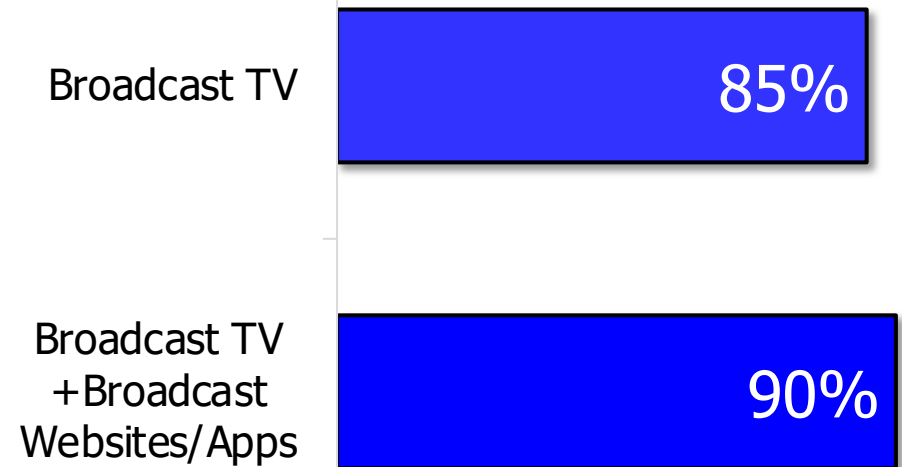


# Streaming with NO Advertising: Advertisers Cannot Reach these Viewers But Broadcast Assets **Can** Reach Most of Them

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



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



# Key Back-to-School Takeaways

- Back-to-School spending is projected to reach a second all-time high in 2024.
- Over half of back-to-school shoppers began shopping by early July, and majority of shoppers still have at least half of their purchases left to make.
- TV advertising is imperative to influence back-to-School shoppers.
  - 9 out of 10 respondents said television influenced their search selections.
  - Broadcast TV delivers top back-to-School 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!**

