

Back to School and College Report 2026

A photograph of school supplies on a dark surface. On the left, a black and white patterned cup holds several colorful pencils. On the right, a red apple sits on a spiral-bound notebook. A yellow pencil and a pink eraser are also on the notebook.

TVB

Local Media
Marketing Solutions

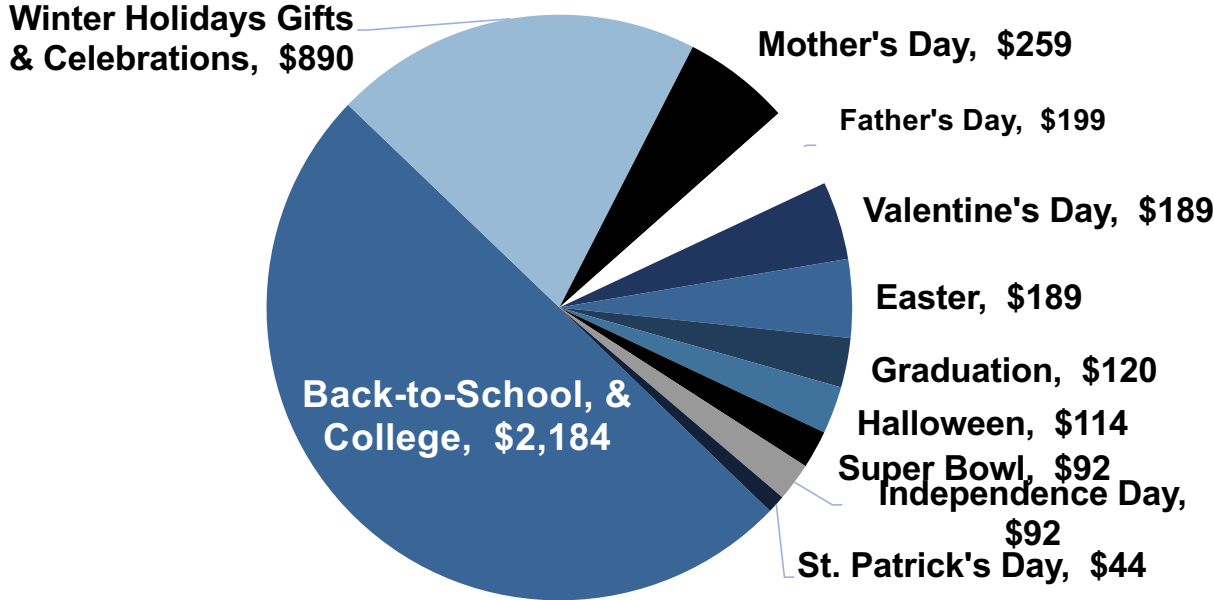
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Consumer Spending Events Observed in 2025

Average Spend Per Person
By Event



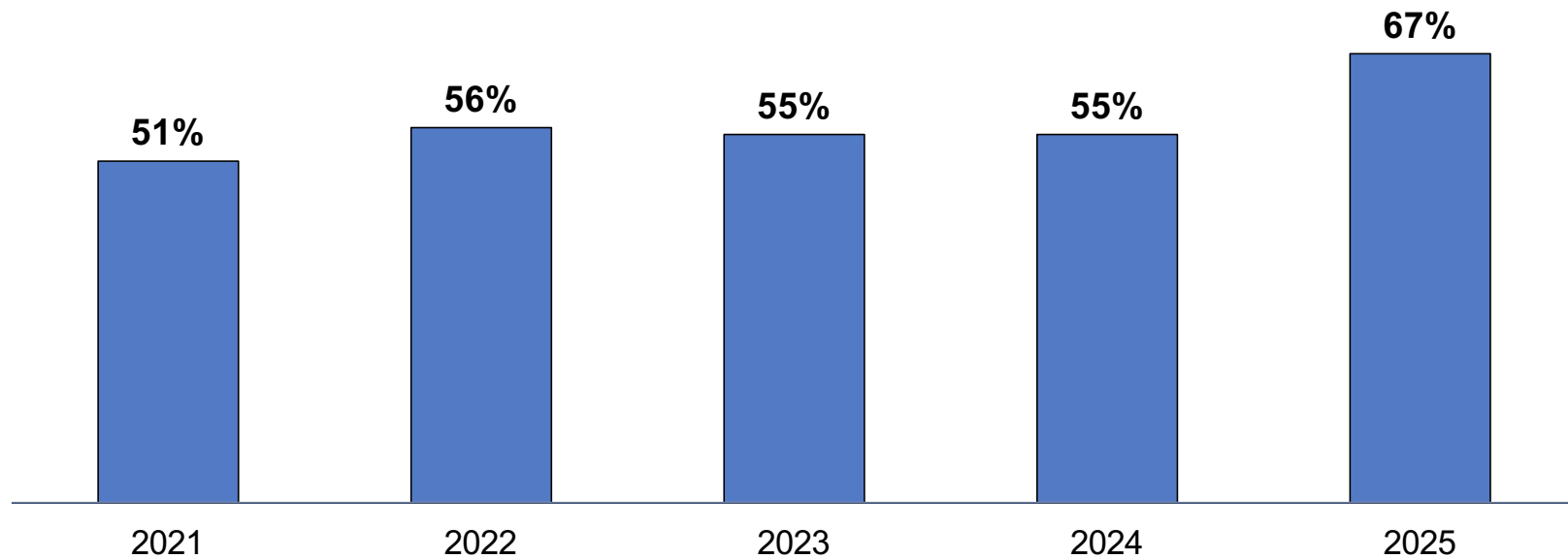
Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

Back-to-School Season Spending and Attitudes



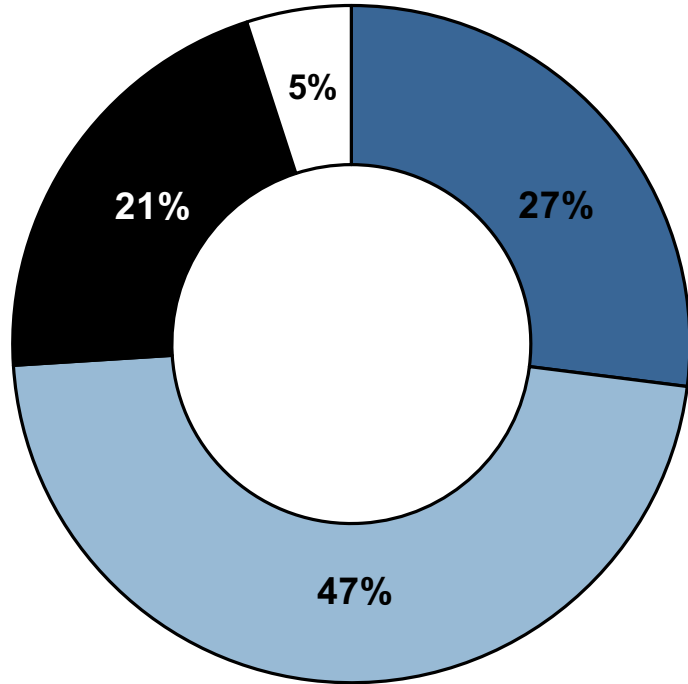
Historically, By Early July Over Half of Back-to-School Shoppers Have Begun Their Shopping

% of BTS Shoppers Who Started Their Shopping by Early July (K-12 & College)



Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

When Consumers Shopped for Back-to-School in 2025



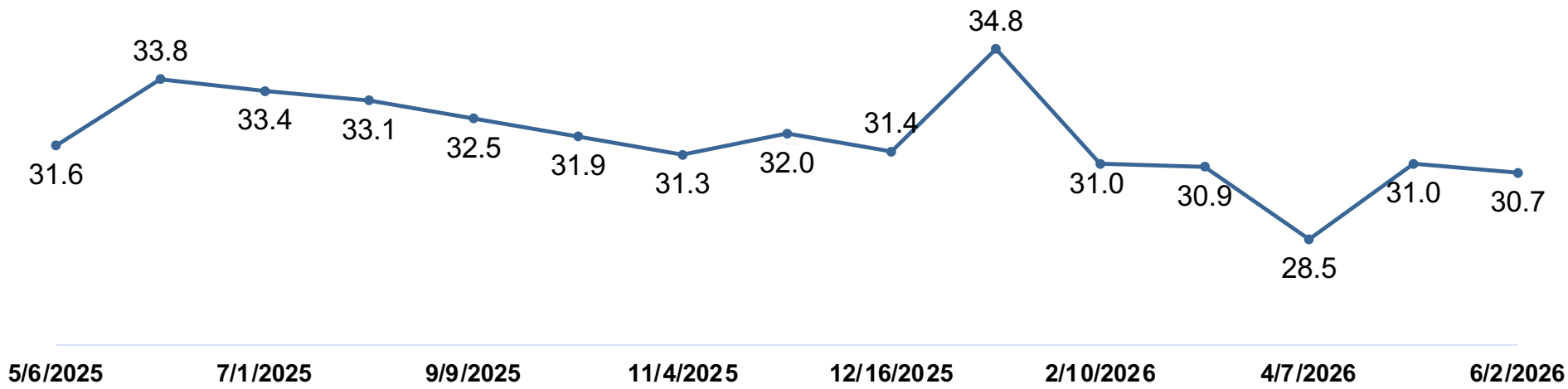
- At least 2 months before school starts
- 3 weeks to 1 month before school starts
- 1-2 weeks before school starts
- The week school starts or later

Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

Consumers Are Currently Struggling to Feel Confident in U.S. Economy

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?

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



Although consumer sentiment is not expected to improve significantly, NRF notes that sentiment has remained historically disconnected from actual spending patterns. Solid underlying fundamentals, particularly income growth, household balance sheets and labor market stability, are expected to support continued consumer activity in 2026...NRF's forecast is presented in nominal terms, and while inflation is expected to remain above the Federal Reserve's target, goods inflation is likely to stay within a lower band. As a result, a meaningful portion of the projected sales growth is anticipated to reflect real gains rather than inflation-driven increases.



- NRF President and CEO,
Matthew Shay

2025

2.7% - 3.7%
forecasted retail
sales growth

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

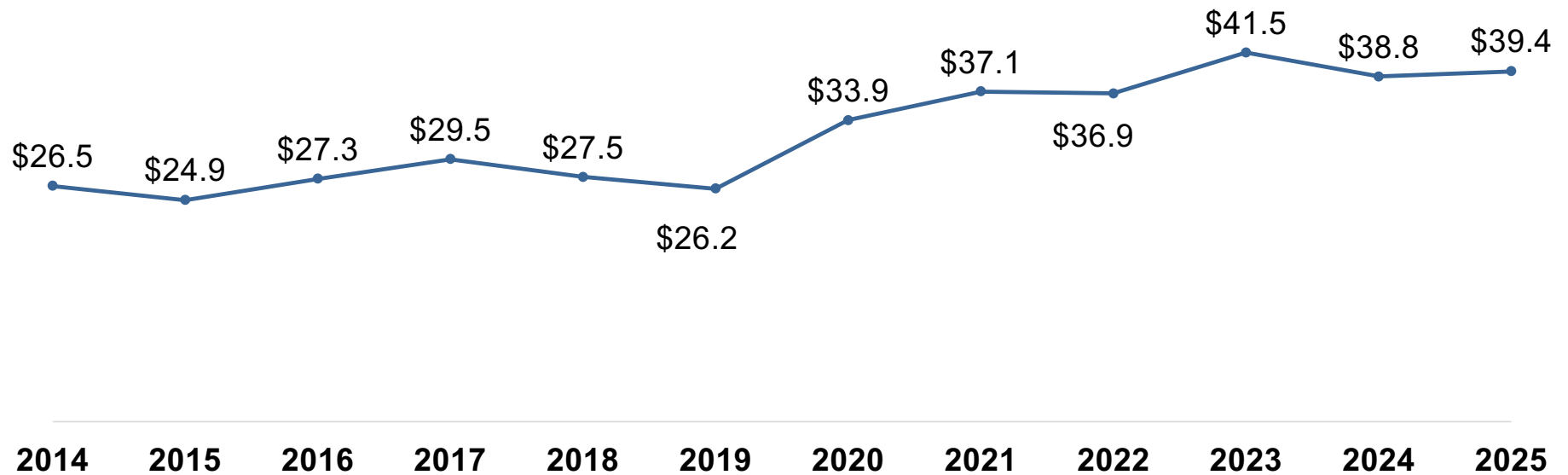
2026

4.4% forecasted
retail sales growth

Annual Sales
Growth forecasted
to \$5.6 trillion

2025 Saw Near Record Breaking Spending for the Back-to-School Season

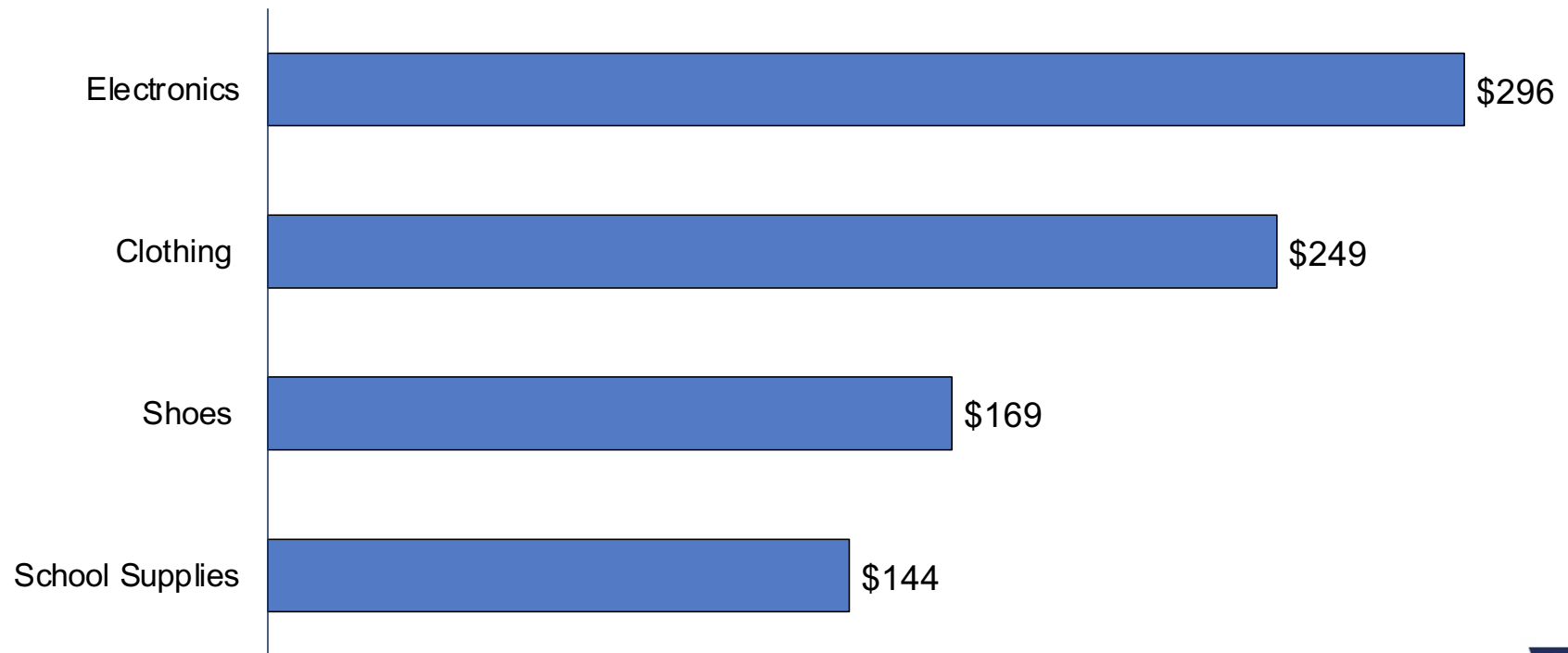
Total Spending
(in billions)



Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

Back-to-School Shoppers Spent the Most Money on Electronics in 2025

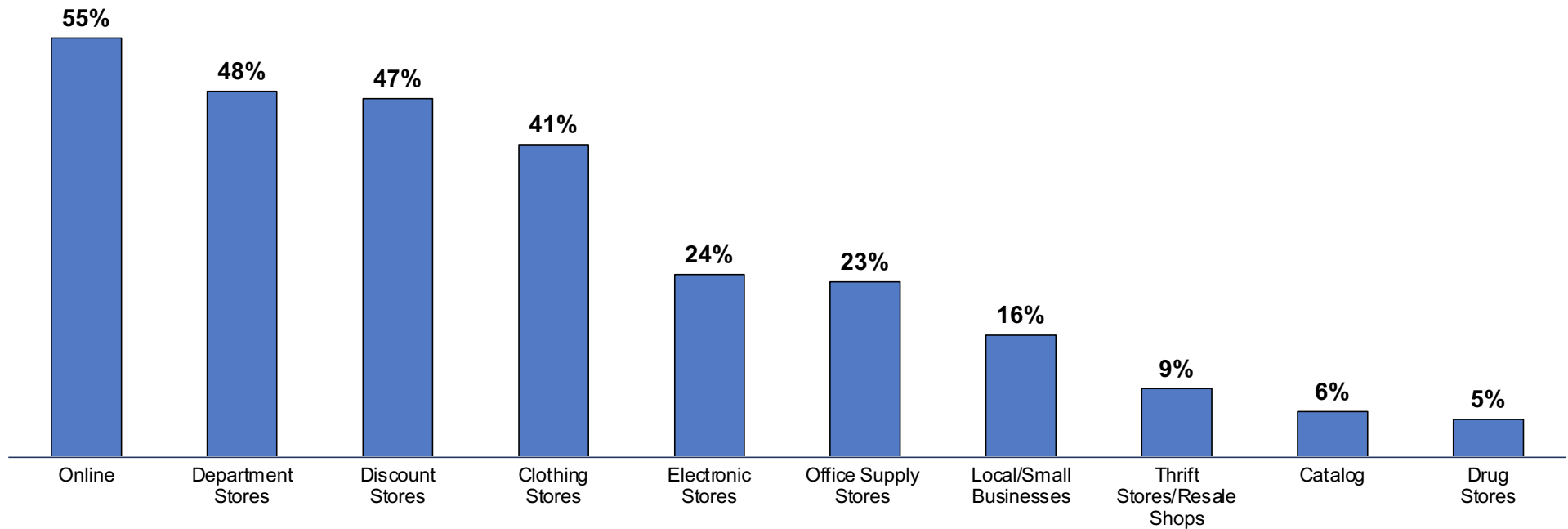
Per Person Spending



Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

55% of Back-to-School Shoppers Shopped Online

Where Consumers Shopped in 2025

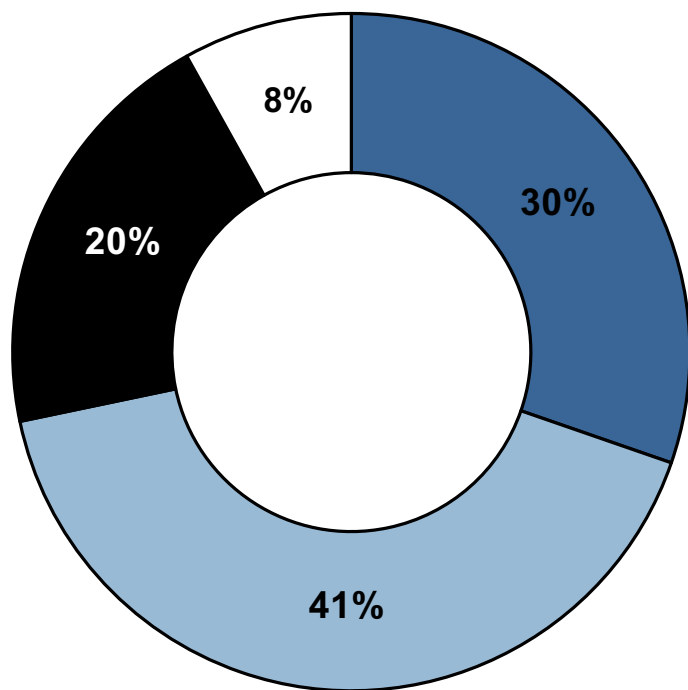


Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

Back-To-College Season Spending



When Consumers Shopped for Back-to-College in 2025

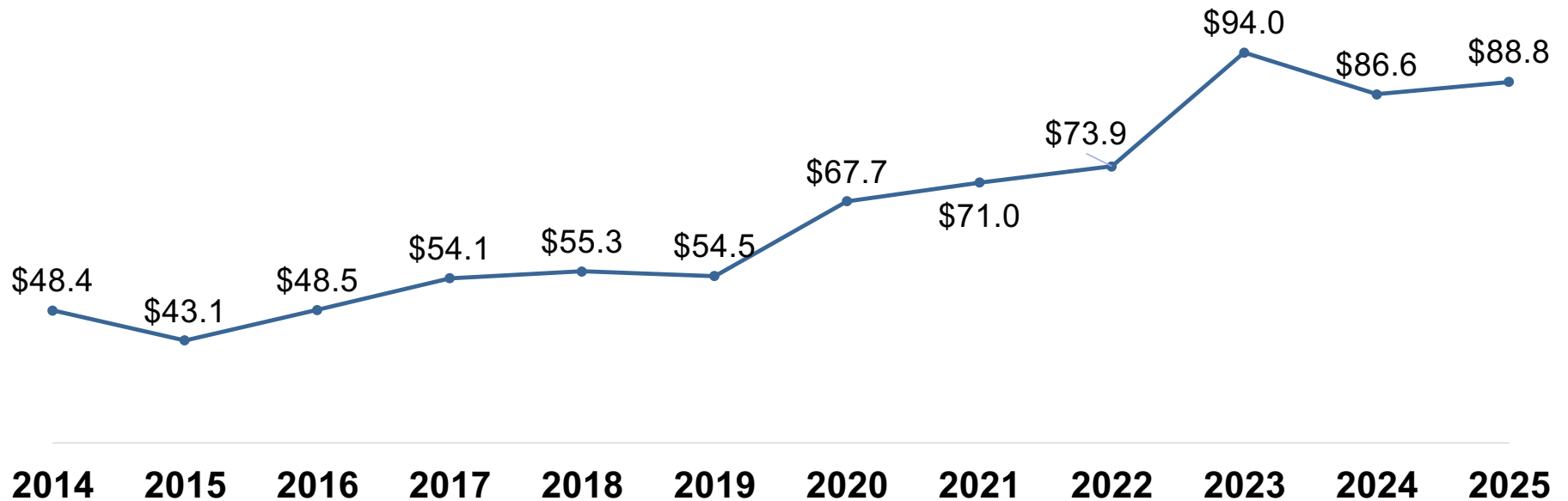


- At least 2 months before school starts
- 3 weeks to 1 month before school starts
- 1-2 weeks before school starts
- The week school starts or later

Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

2025 Saw Near Record Breaking Back-to-College Spending

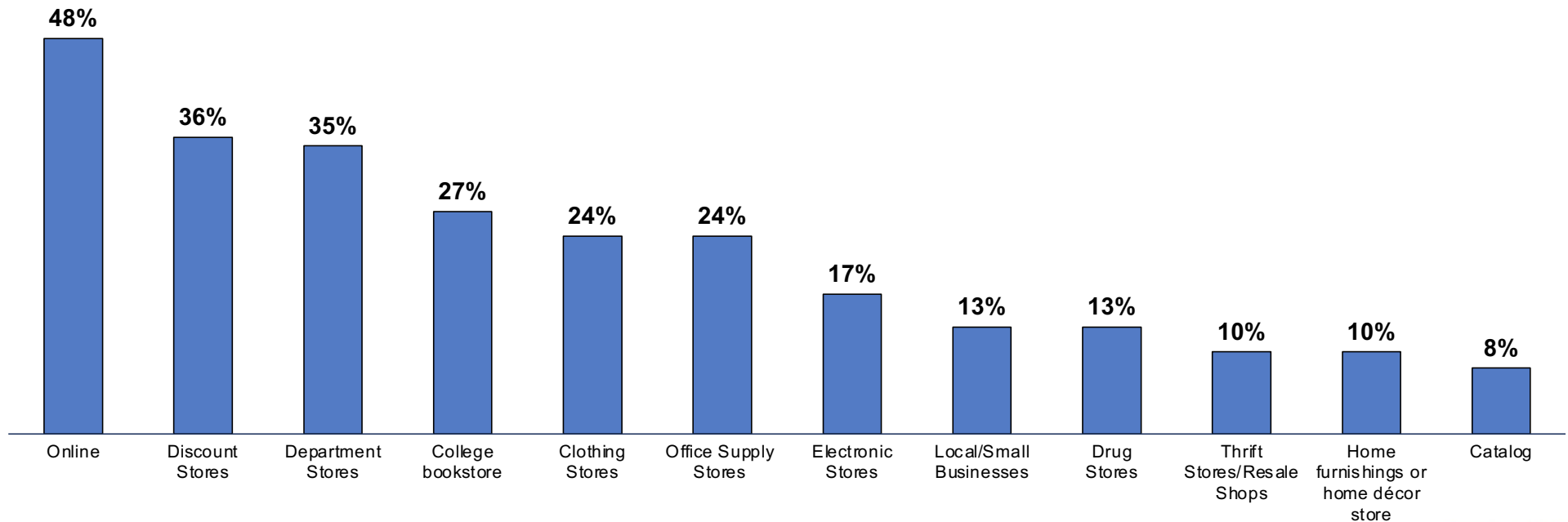
Total Spending In Billions



Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

When Shopping for Back-to-College, 48% of Consumers Shopped Online

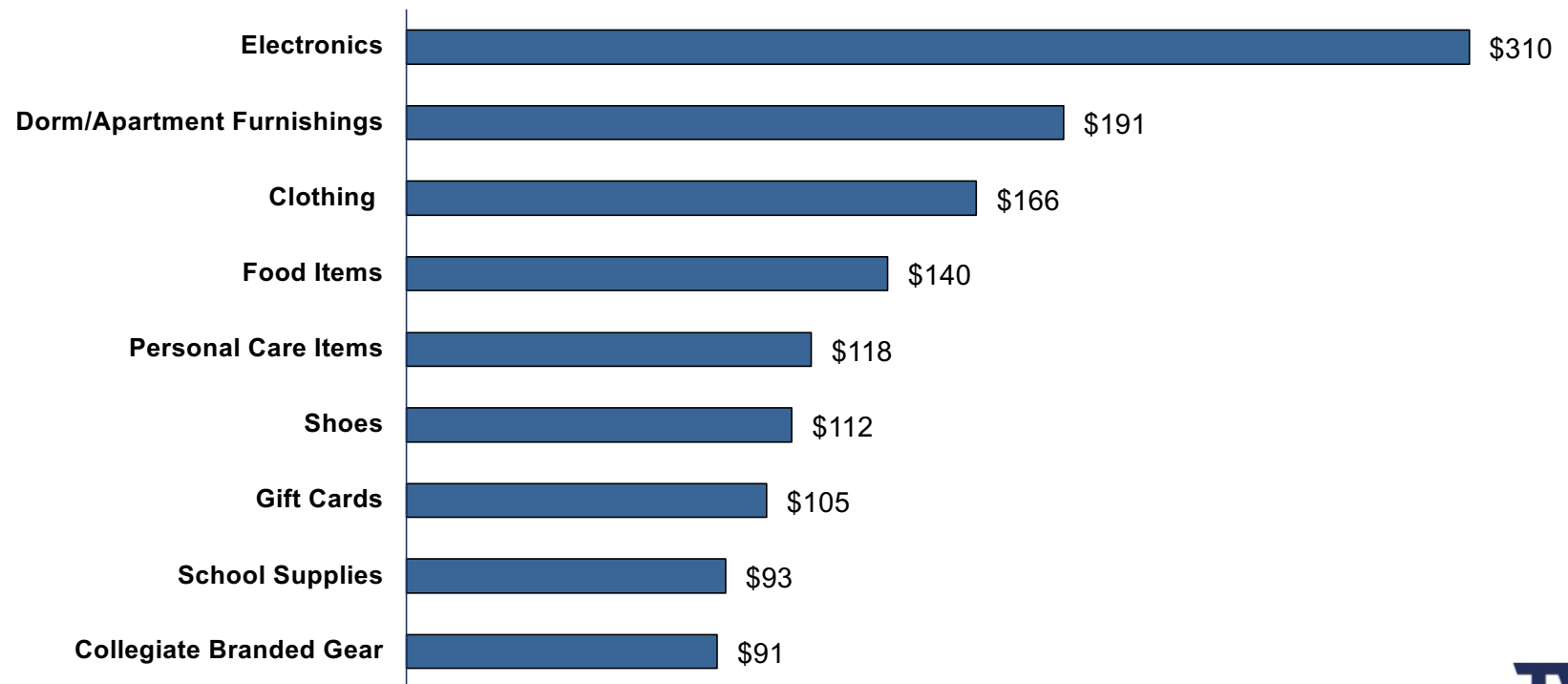
Where Consumers Shopped in 2025



Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

Top Categories for Back-to-College Shopping in 2025

Per Person Spend By Category



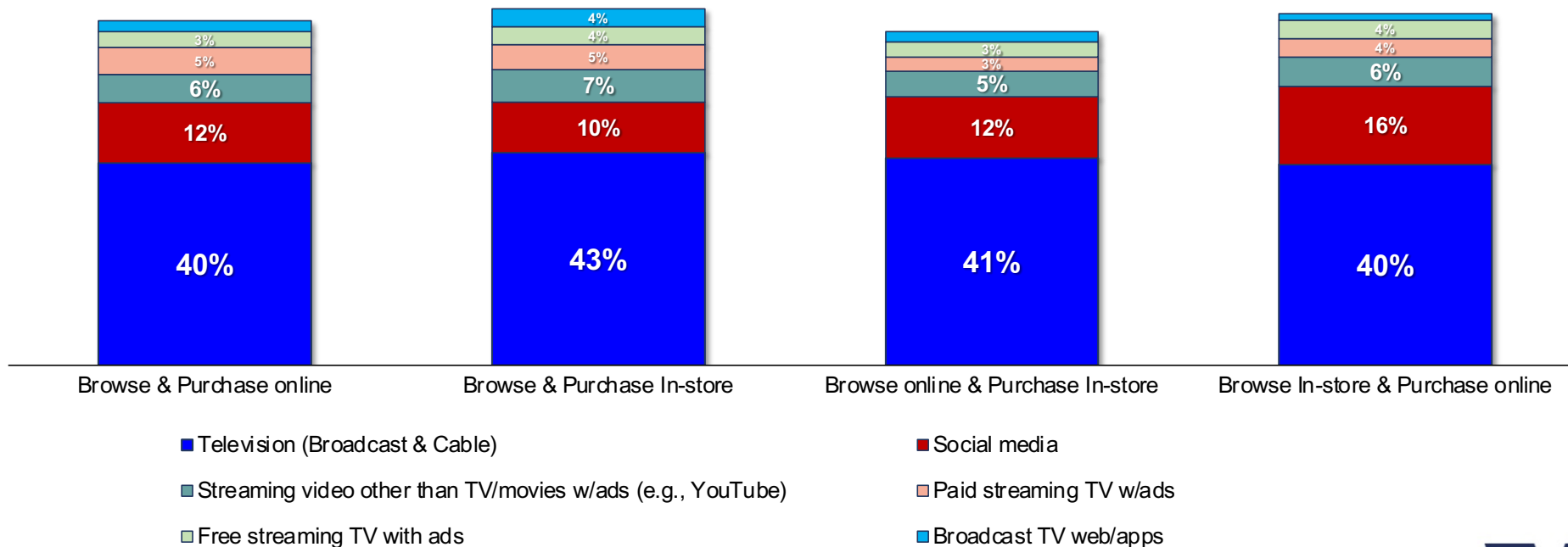
Source: NRF's Annual 2025 Back-to-School Spending Survey, conducted by Prosper Insights & Analytics

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



What Influenced Retail Consumers Most

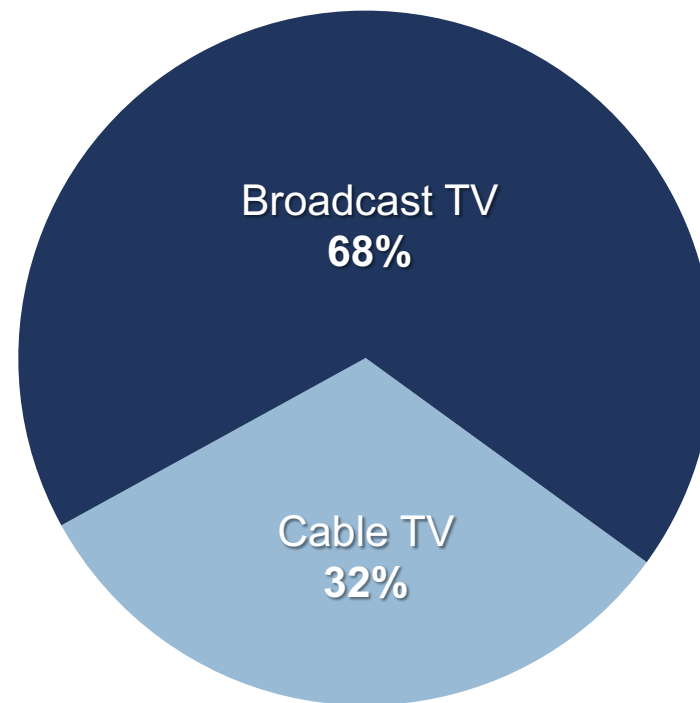
**% A18+ Retail Shoppers
Most Important Influence for Awareness**



Source: GfK/NIQ TVB Purchase Funnel 2026 Retail Category A18+; QA4 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 the Awareness Phase, 7 out of 10 Picked Broadcast TV

% A18+ Retail (In-store & Online)



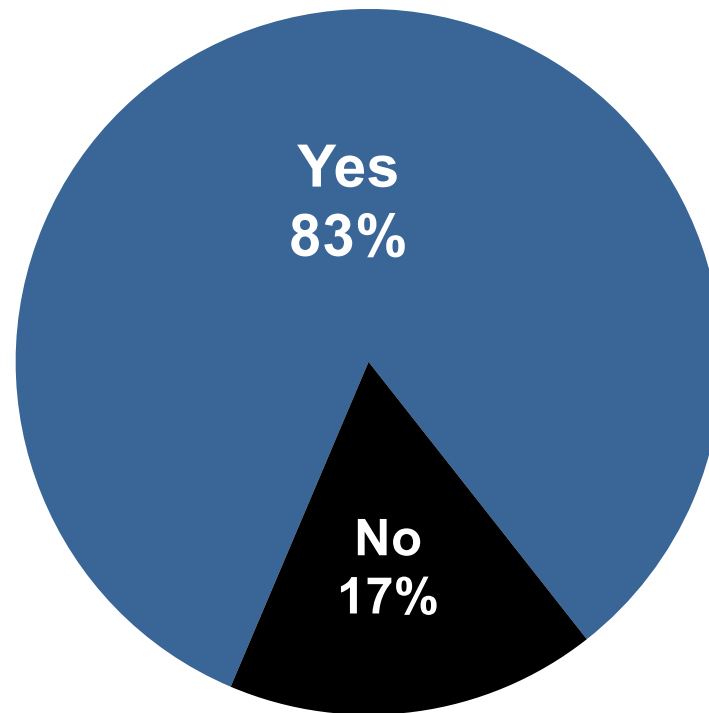
Source: GfK/NIQ TVB Purchase Funnel 2026 Retail Category A18+

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 the 40% who chose television as most important for awareness, 68% chose broadcast TV.

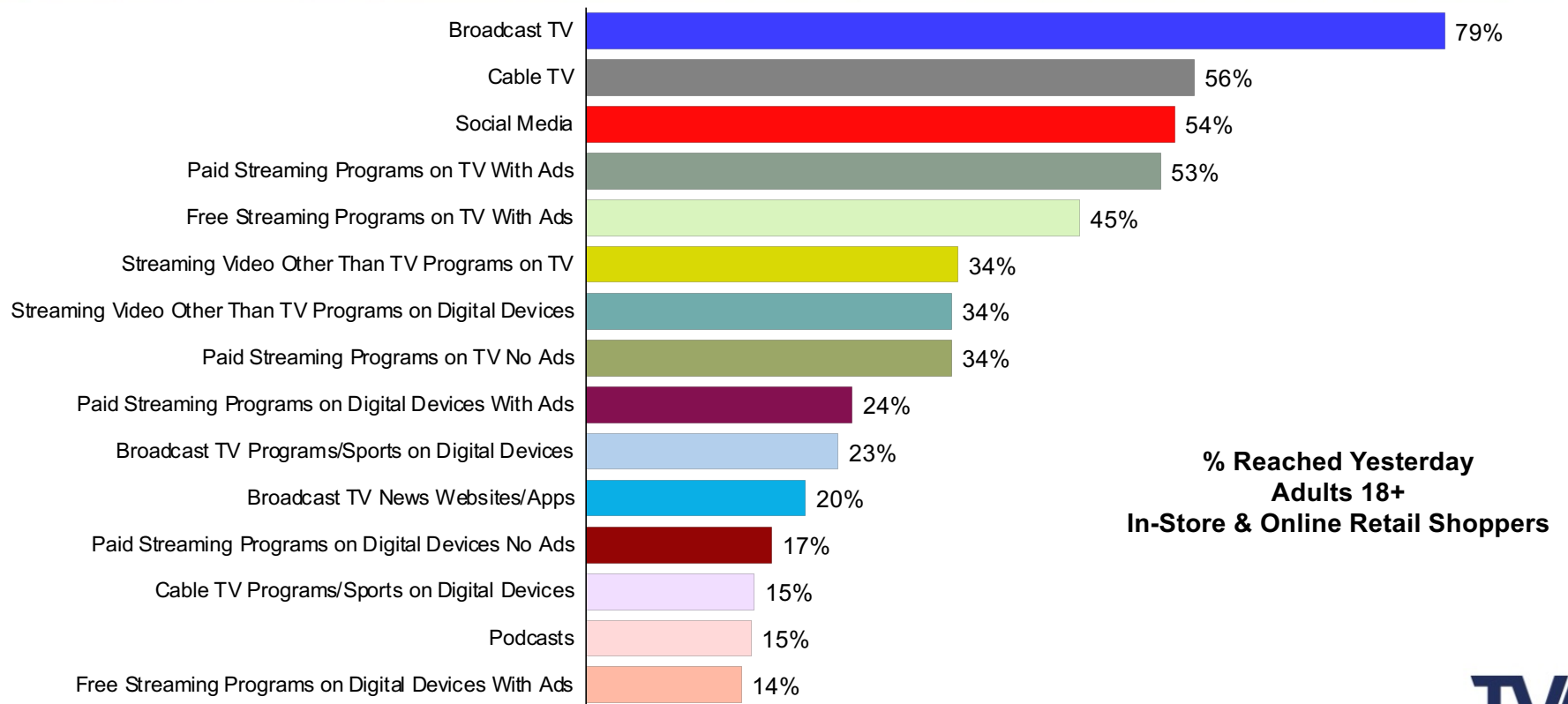
“When Visiting a Television Station’s Website or App, do you View the Ads?”

% A18+ Retail (In-store & Online)



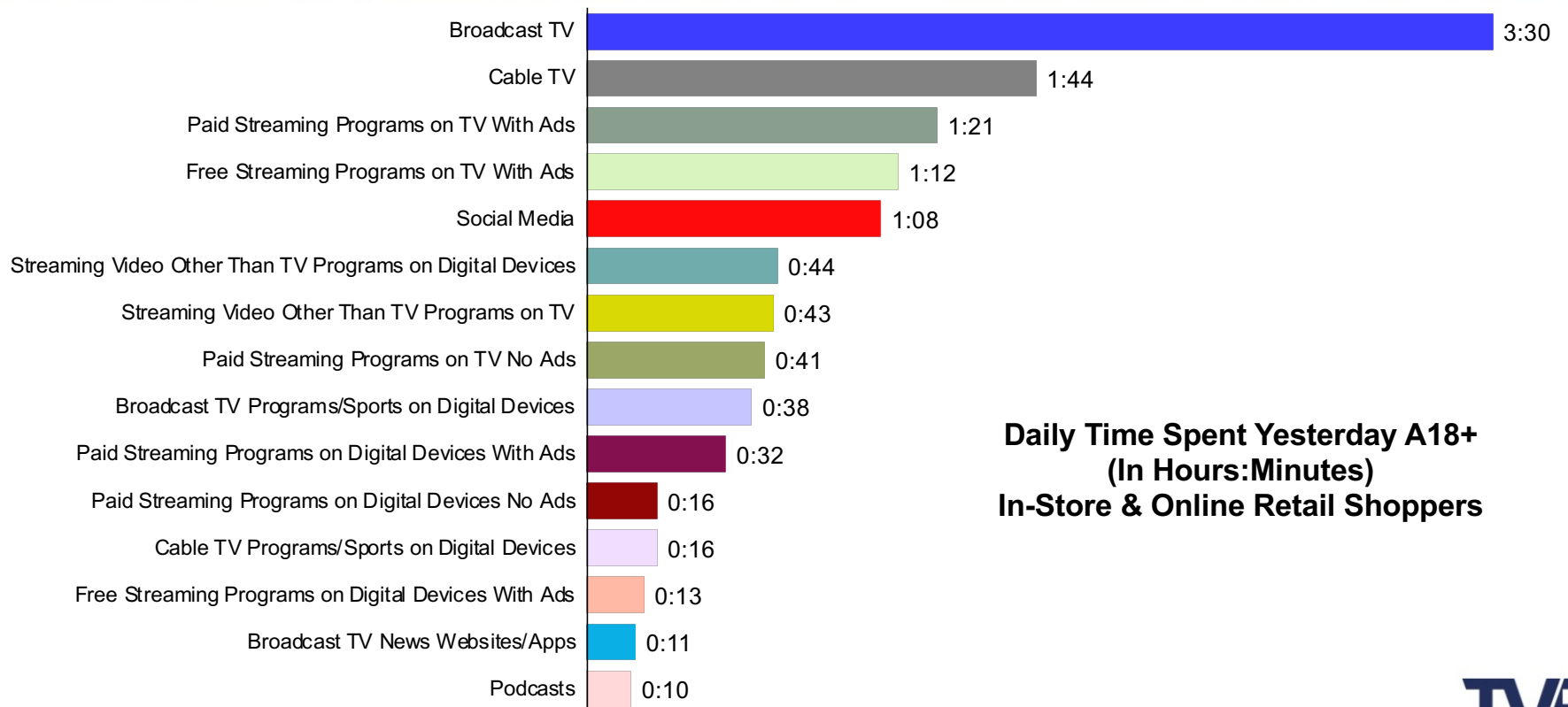
Source: GfK/NIQ TVB Purchase Funnel 2026 Retail Category A18+ C2 “How often do you look at the video ads on that local television station’s website or app?” (Yes = combination of Every time, Most of the time & Sometimes).

Broadcast TV Has the Highest Reach for Retail Consumers



Source: 2026 GfK/NIQ TVB Media Comparisons Study. M-S 4A-2A. Persons 18+. Shopped in-store in the past year. Shopped Online in the past year. Digital 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.

Retail Consumers Spend the Most Time With Television



**Daily Time Spent Yesterday A18+
(In Hours:Minutes)
In-Store & Online Retail Shoppers**

Source: 2026 GfK/NIQ TVB Media Comparisons Study. M-S 4A-2A. Persons 18+. Shopped in-store in the past year. Shopped Online in the past year. Digital 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.



Majority of Retail Consumers Are Having Conversations About Topics That Local Station TV News Covers

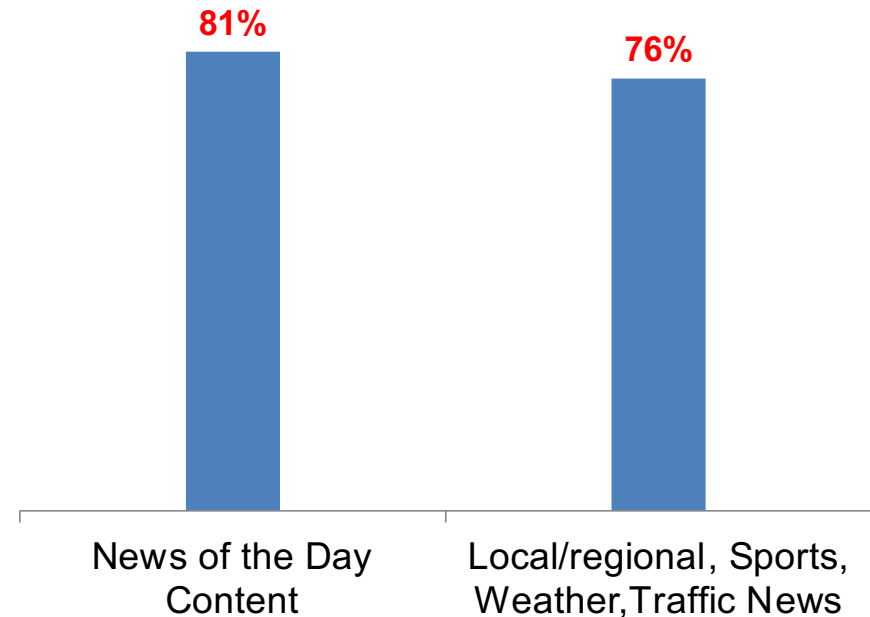
News of the Day

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



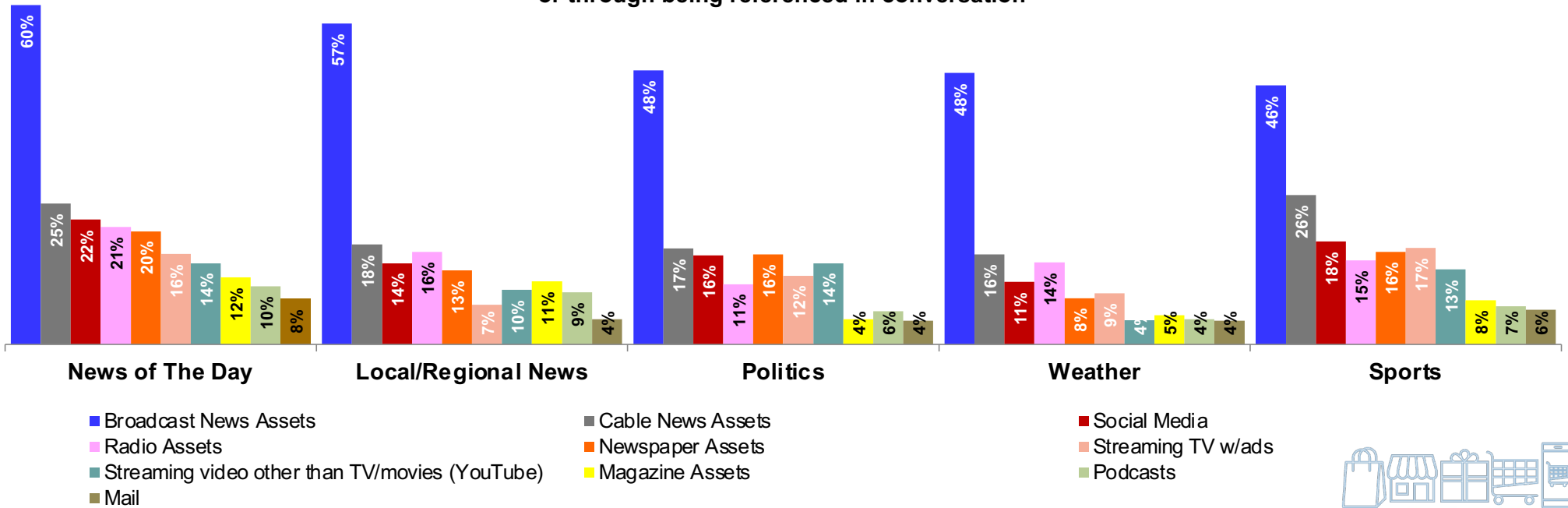
Source: GfK/NIQ TVB Media & Conversations Study 2026 A18+ Retail Category. Plan to purchase at a retail store (in-person or online) in the next year.
Q1 Please enter the approximate number of conversations you had in the past 24 hours. The conversations could have been face to face, on the phone, via email, on text, on social media or any other way you may have communicated with someone.

% A18+ Retail Consumers



Retail Consumers: Conversations About News Are Significantly Affected By Broadcast News Assets

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



Source: GfK/NIQ TVB Media & Conversations Study 2026 A18+ Retail Category. Plan to purchase at a retail store (in-person or online) in the next year.Q8/9 “Which one of the following comes closest to describing what prompted or “sparked” or referenced the conversation about the topic?” Broadcast News Assets include local and national broadcast TV news, websites/apps, and streaming (dedicated streaming app and on a streaming platform). Cable News, Radio, Newspaper, and Magazines Assets include website and apps.



TVB

Retail Consumers: Local Broadcast TV News is #1 For Trust, Far More Than Cable, Streaming, and Social Media

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



TVB

Source: GfK/NIQ TVB Media & Conversations Study 2026 A18+ Retail Category. Plan to purchase at a retail store (in-person or online) in the next year.

Q15 “Please indicate the extent to which you agree or disagree with the following statement, ‘I trust the news that I see/hear on...’” Top two boxes shown (agree strongly & agree somewhat).

“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...



TVB

Source: GfK/NIQ TVB Media & Conversations Study 2026 A18+ Retail Category. Plan to purchase at a retail store (in-person or online) in the next year.
 Q14 “How likely are you believe what somebody tells you if they say they heard about it from this source...?” Top two boxes shown (Very/somewhat likely).

Recognize Each Market's Seasonal Timing and Strength



Availability of Brand/Product

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

Product usage is different by state or market

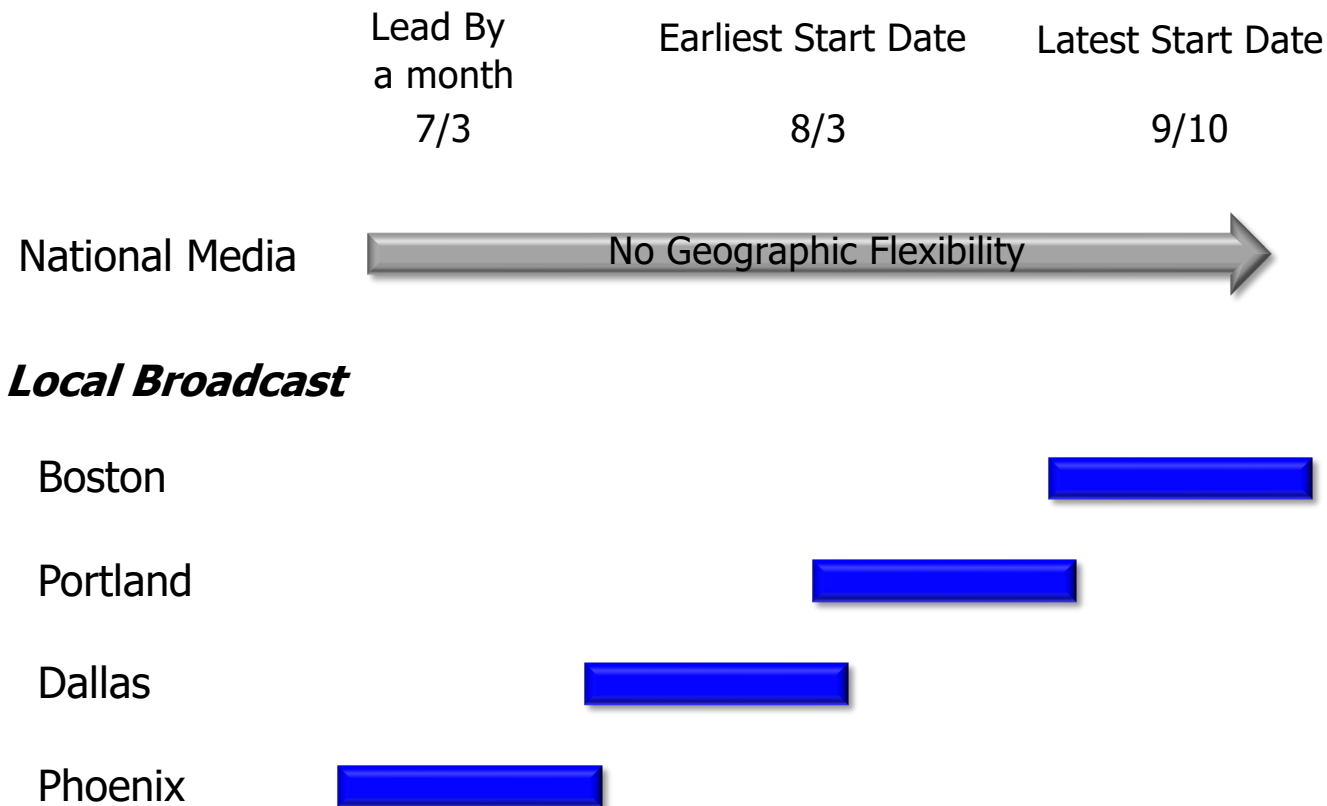
Brands, Retail Stores, Restaurants, and Automotive Dealers have varied **concentrations** in different regions of the U.S.

Capitalize on Local Sales Strength

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

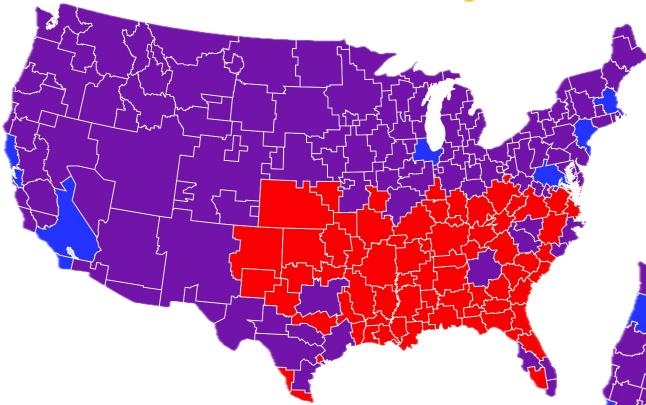
Geographic targeting with local TV focuses on **high response areas** and delivers **high-potential customers**

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



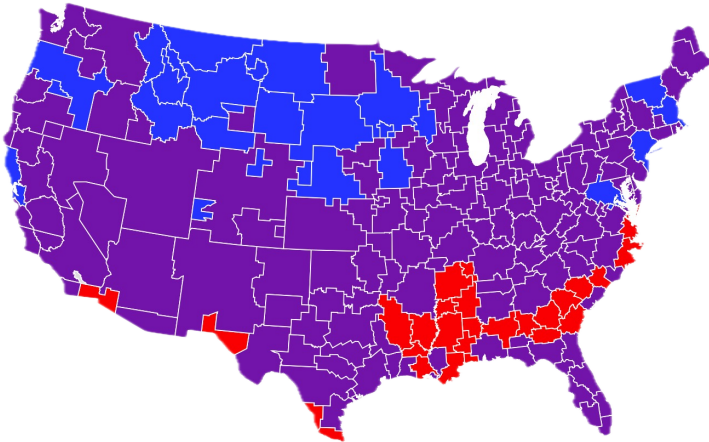
Different Markets Have Different Needs. One Size Fits All Approach does NOT work.

Walmart 

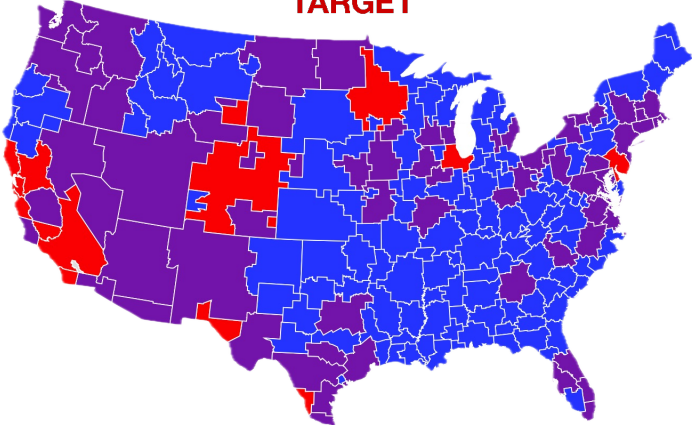



Parents


DOLLAR TREE




TARGET

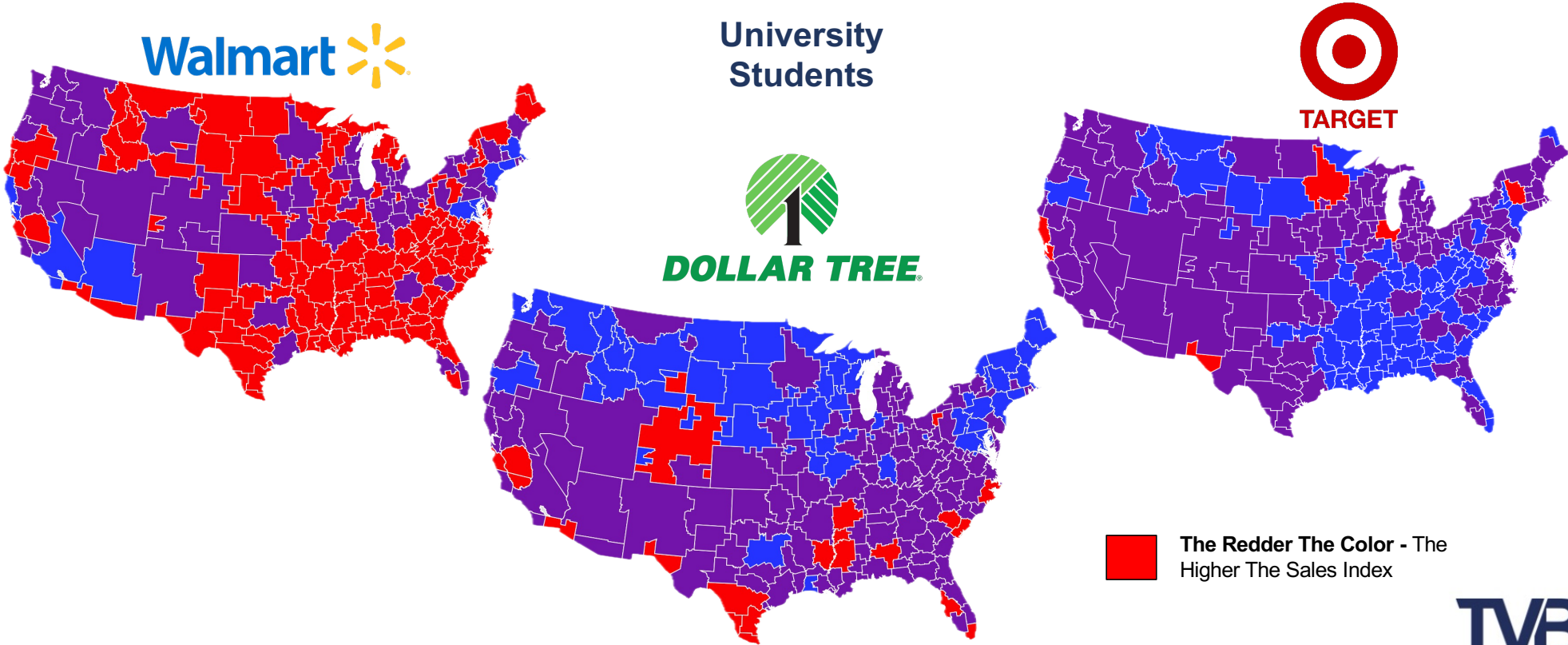


 The Redder The Color - The Higher The Sales Index

TVB

Source: MRI-Simmons Fall 2025 Market-by-Market Study weighted by A18+ Parents. Shopped at Target, Walmart or Dollar Tree in the last 3 Months.

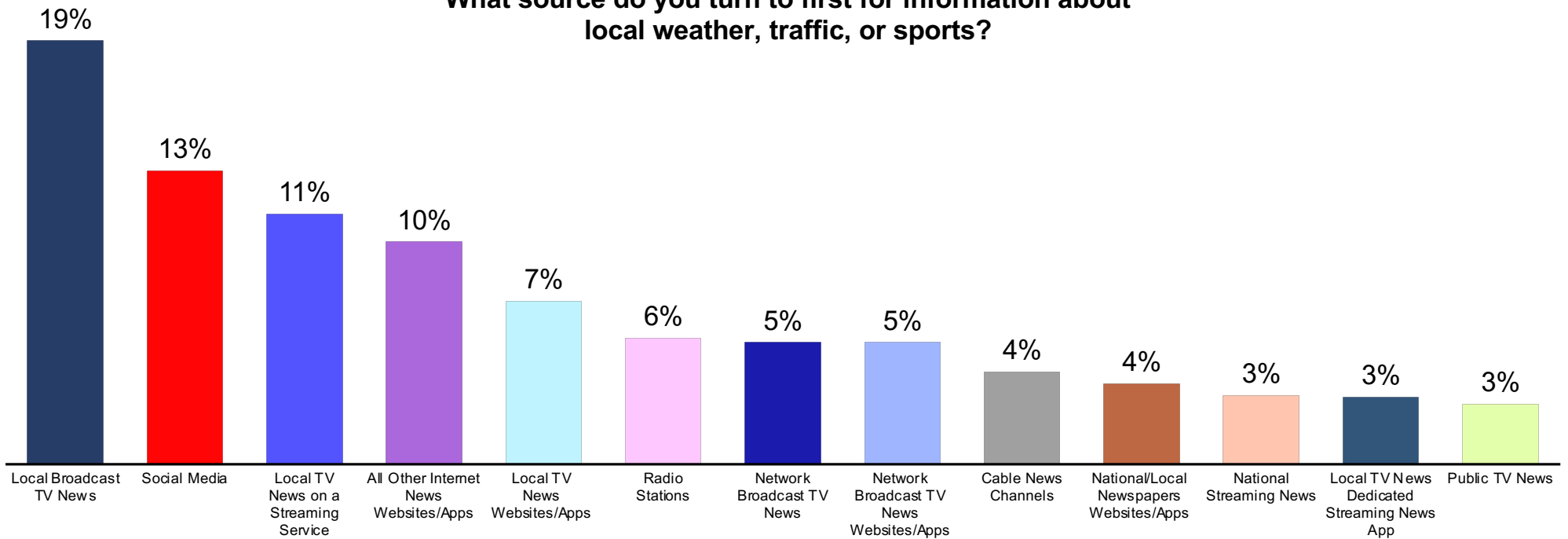
Different Markets Have Different Needs. One Size Fits All Approach does NOT work.



Source: MRI-Simmons Fall 2025 Market-by-Market Study weighted by A18+ University Students. Shopped at Target, Walmart or Dollar Tree in the last 3 Months.

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

What source do you turn to first for information about local weather, traffic, or sports?

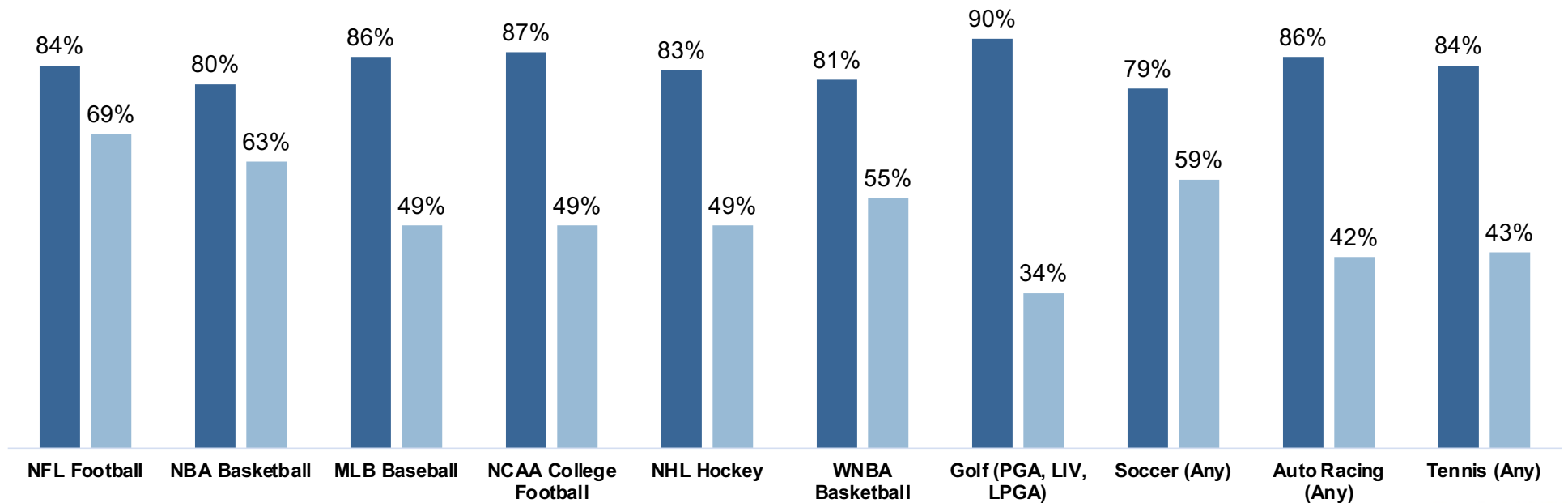


Source: 2026 GfK/NIQ TVB Media Comparisons Study. Persons 18+. Includes only those who chose a media.
QO6 - What source do you turn to first for information about local weather, traffic, or sports? Under 3% not shown.

For Sports Enthusiasts, Linear Television Is The Preferred Way To View Their Favorite Sports!

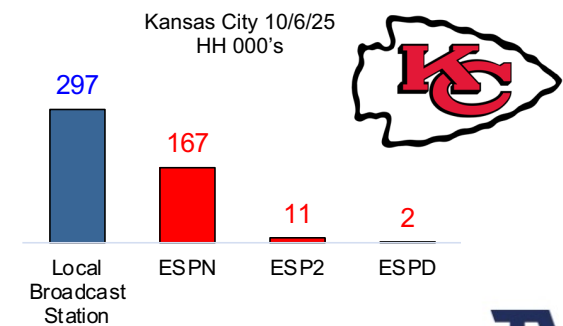
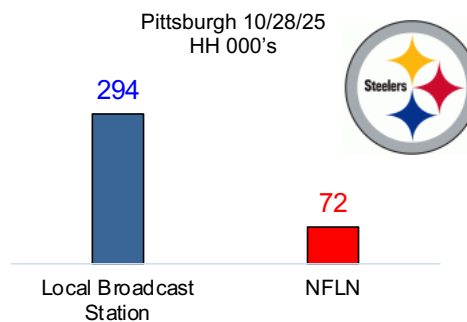
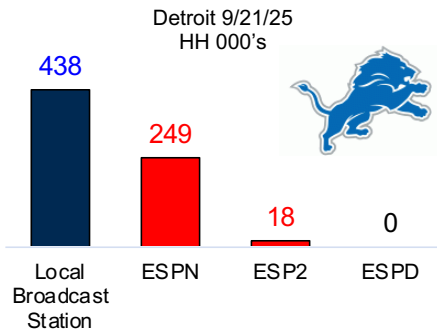
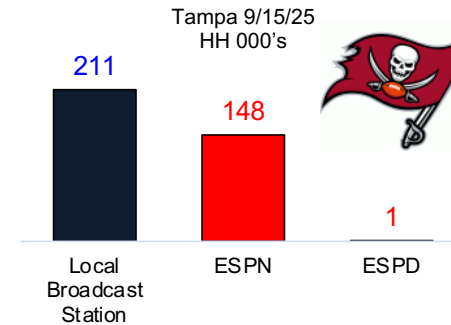
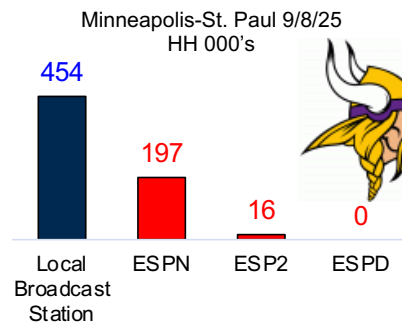
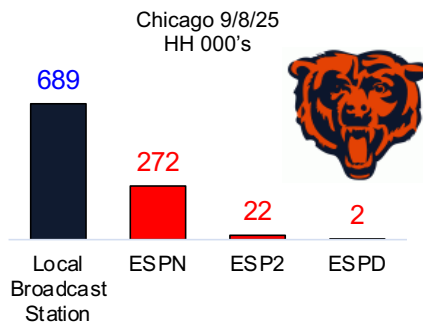
How do you watch the following sports?

■ Linear Television ■ Streaming Services/Networks



Source: Dynata / TVB 2026 Sports Survey. How do you watch the following sports?

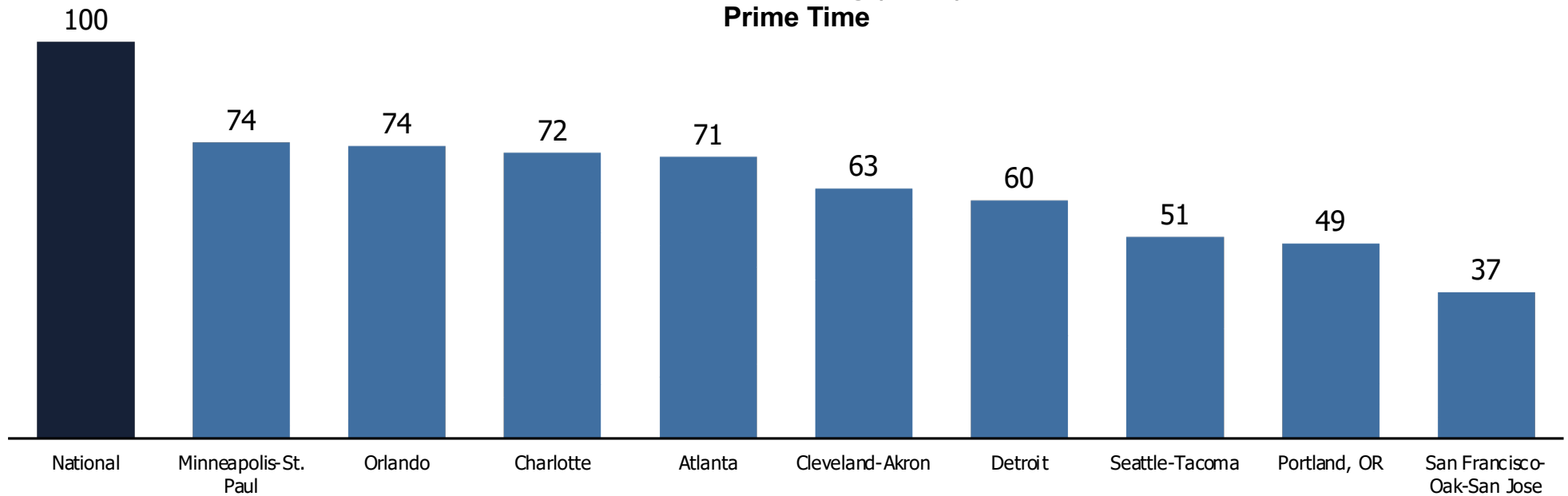
Games Simulcast on Both Broadcast & Cable do Better on Broadcast



Source: Nielsen Arianna; HH Live+1 000'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

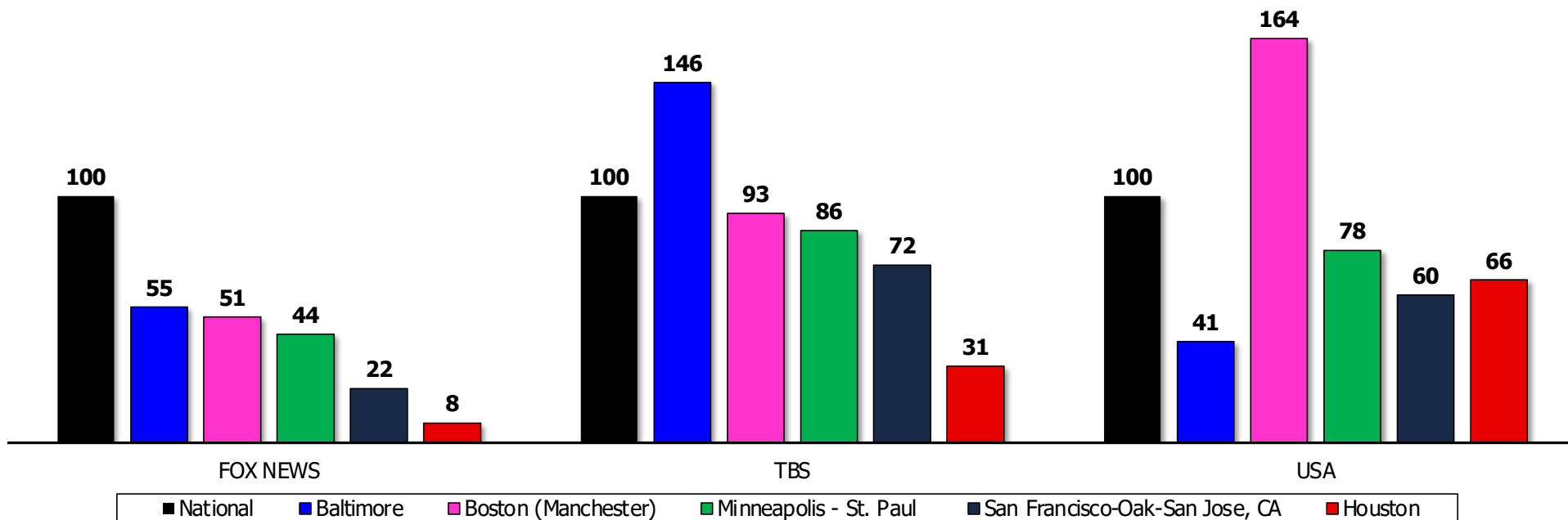


Source: Nielsen NPOWER July 2025 ABC, NBC, CBS, FOX, UNI, TEL; Prime Time Viewing; LPM Markets vs National only.



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

**A25-54 L+1 Rating (index)
M-F Prime Time**

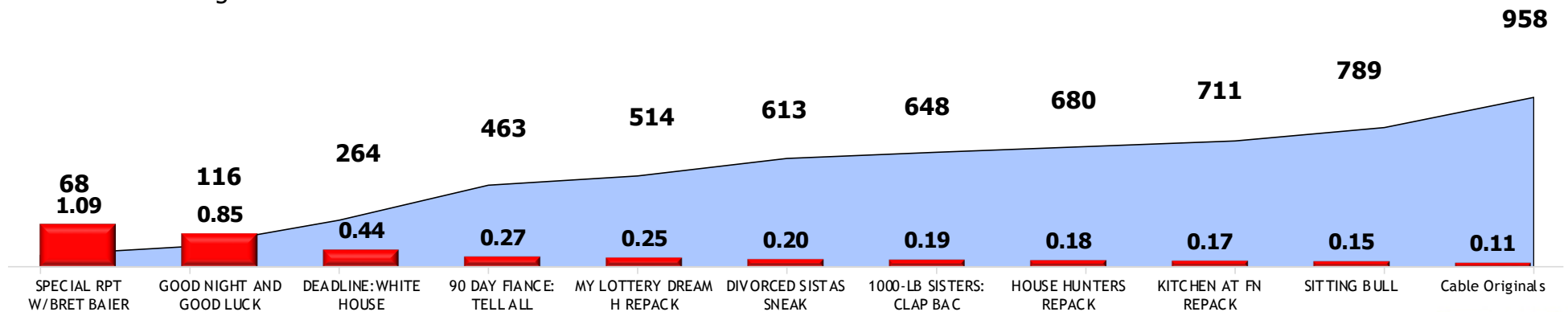


Source: Nielsen NPower, July 2025. LPM Markets vs National only.

Broadcast Programs During the Summer Outstrip Even Cable Originals

To be read as: Fox News Channel's "Special Report With Bret Baier" had a 1.09 average A18+ rating in June 2025. During the same time-period, there were 68 Broadcast & Syndication programs that had higher average ratings.

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

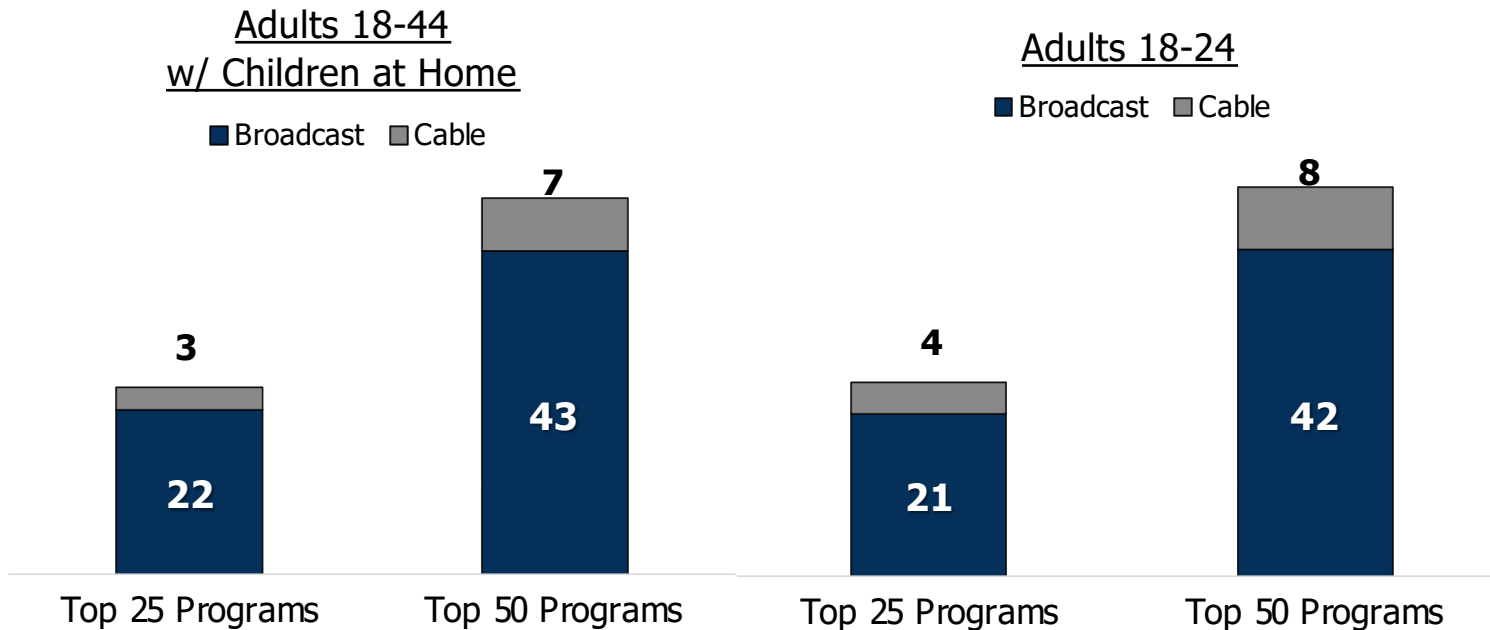


Source: Nielsen NPower 05/26/2025-06/29/2025. Adults 18+. Live+1 Ratings.



Broadcast TV Tops in Summer Ratings

Top Rated Programs

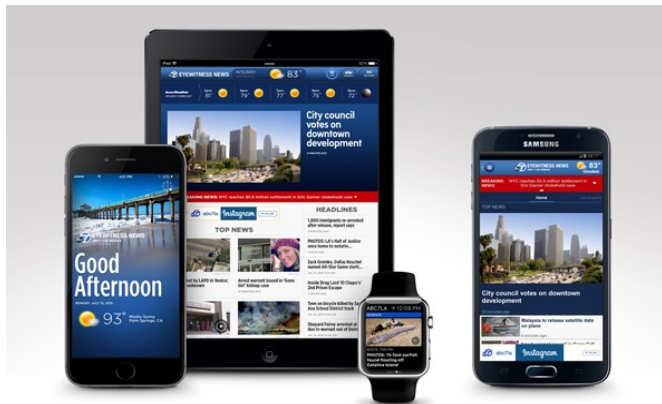


Source: Nielsen NPower 06/30/2025 - 08/31/2025. Broadcast (Includes Syndication) & Cable Live+1 Ratings.

Regardless of How Consumers Shop, Local TV Assets Are Key



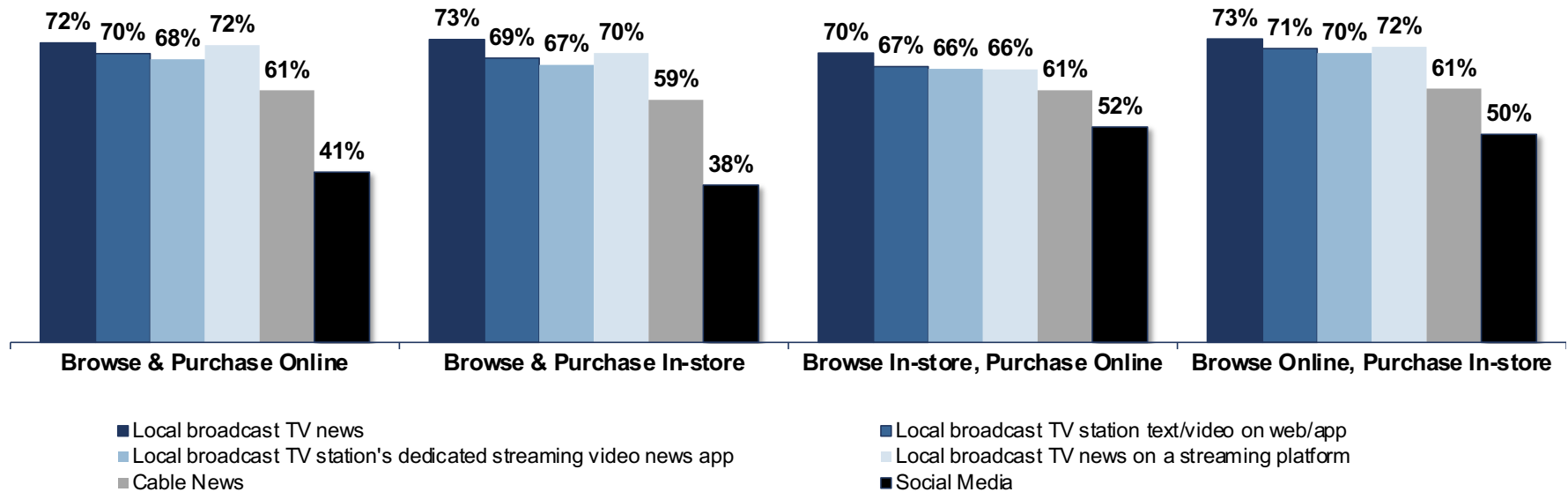
Broadcast TV Websites/Apps Provide Multi-platform Opportunities



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

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

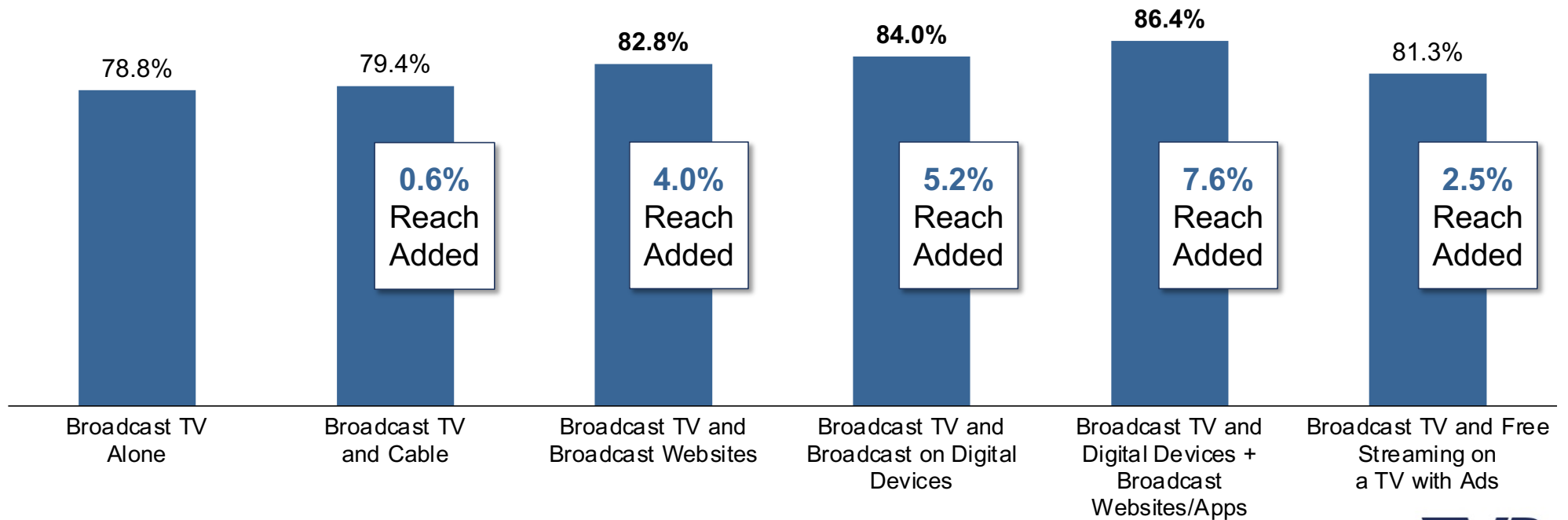
Retail (In-store & Online)
% A18+ Agreeing



Source: GfK/NIQ TVB Purchase Funnel 2026 Retail Category A18+
B2 “I trust the news I see/hear on this media source.” (Agree Strongly + Agree Somewhat).

Broadcast Digital Assets Added Significantly More Reach to Broadcast TV Than Cable or AVOD for In-Store and Online Retail Shoppers

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



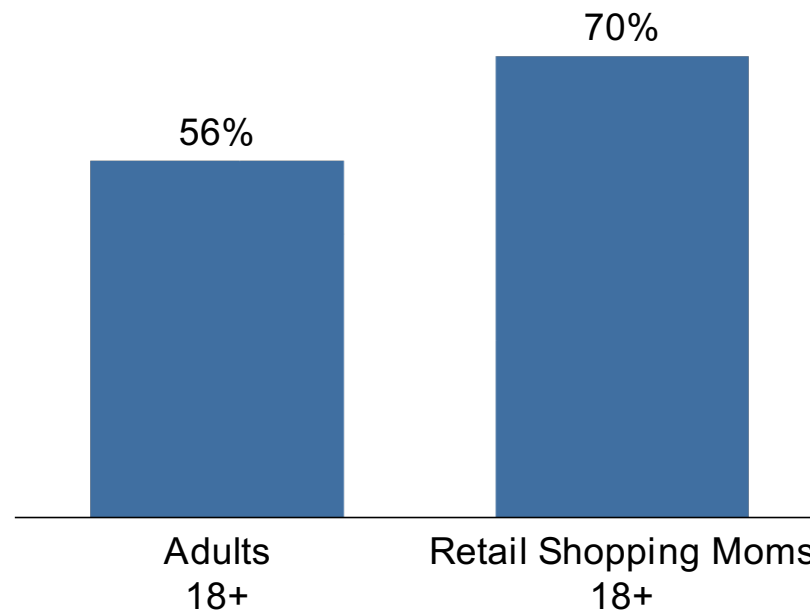
Source: 2026 GfK/NIQ TVB Media Comparisons Study. M-S 4A-2A. Persons 18+. Shopped in-store in the past year. Shopped Online in the past year.



Television Ads Are Motivation to Do Further Research Online for In-Store & Online Retail Shopping Moms

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

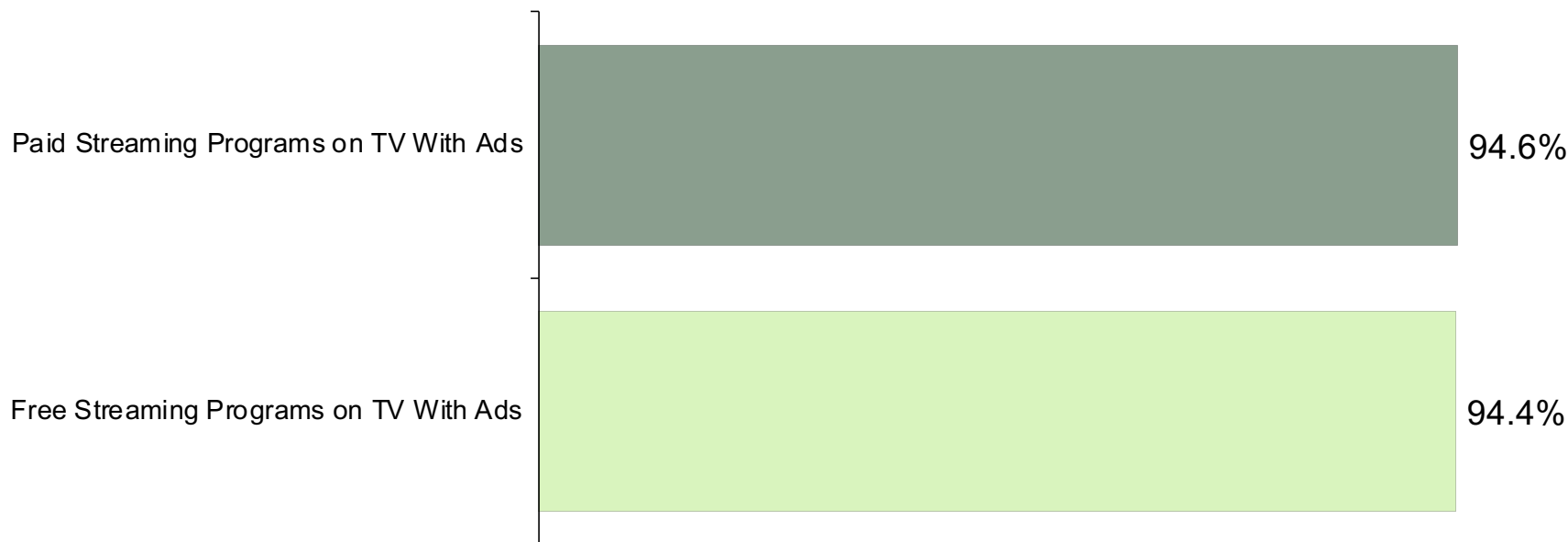
% Yes



Source: 2026 GfK/NIQ TVB Media Comparisons Study. Persons 18+, Women 18+: parent or legal guardian of any children in the household. Shopped in-store in the past year. Shopped Online in the past year. Q03 - Has an advertisement on television motivated you to go to the Internet to find out more information about that product or service?

In-Store and Online Retail Shoppers That Stream With Ads Are Reached by Broadcast as Well

**% of Each That Are Reached by Broadcast TV
In-Store and Online Retail Shoppers**



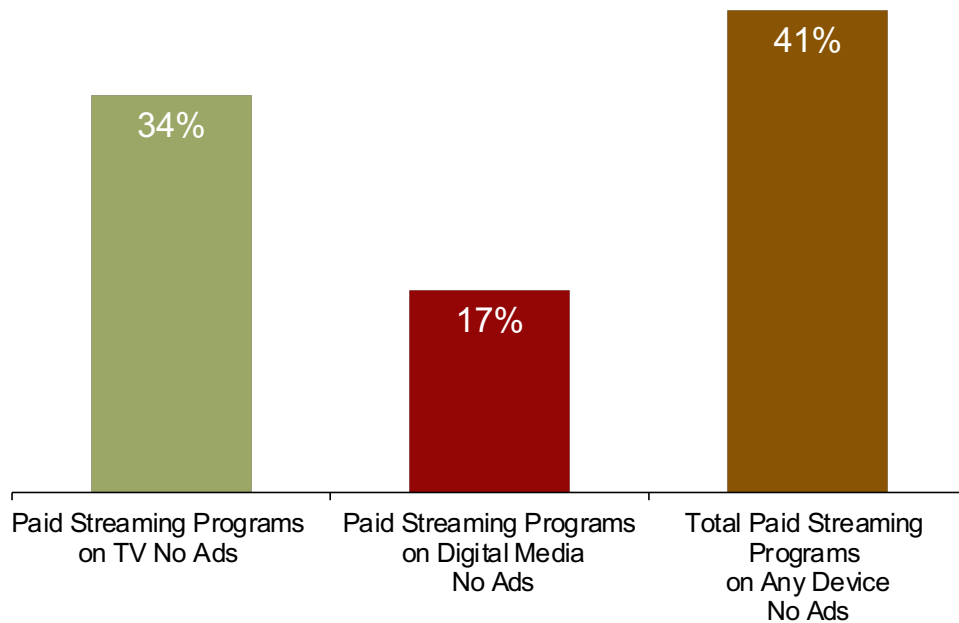
To be read as:

Broadcast reaches 94% of those that view free ad-supported streaming programs on TV.

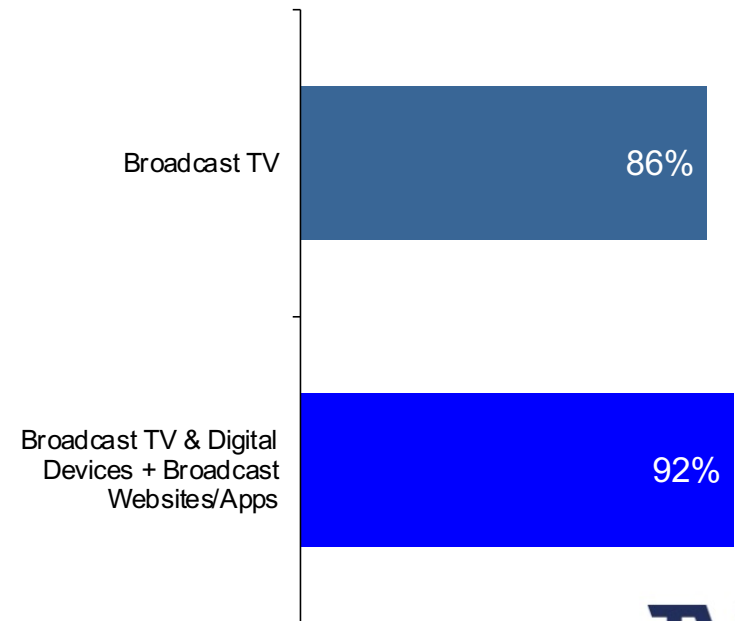
Source: 2026 GfK/NIQ TVB Media Comparisons Study. M-S 4A-2A. Persons 18+. Shopped in-store in the past year. Shopped Online in the past year.

Streaming With No Advertising: Advertisers Cannot Reach These In-Store and Online Retail Shoppers But Broadcast Assets Can Reach Most of Them

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



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



Source: 2026 GfK/NIQ TVB Media Comparisons Study. M-S 4A-2A. Persons 18+. Shopped in-store in the past year. Shopped Online in the past year.

Key Back-To-School Takeaways

- The NRF saw near record spending for Back-to-School in 2025. Despite low consumer sentiment, the NRF predicts strong retail year ahead.
- 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.



**THANK
YOU!**



TVB