

Back to School & College 2020



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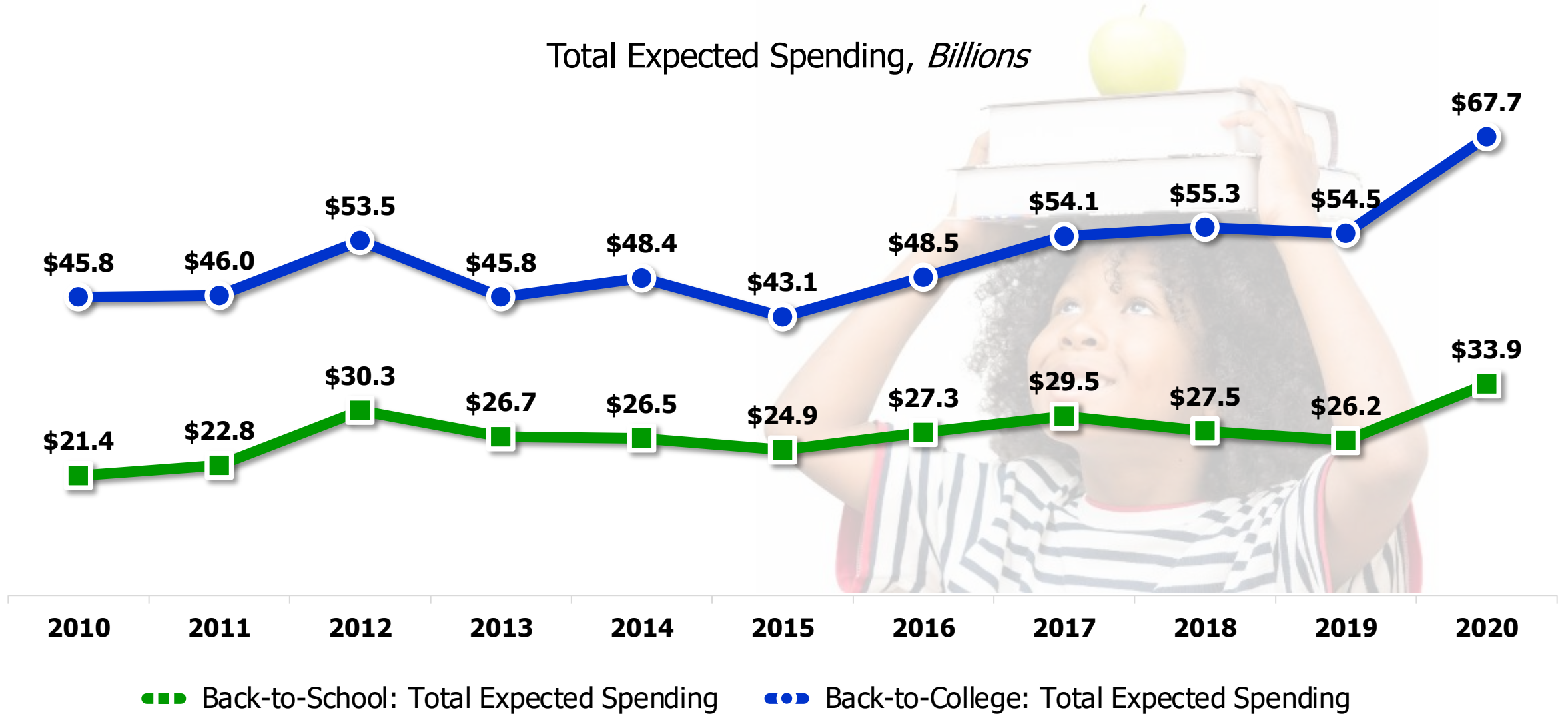
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88% of back-to-class consumers say the Coronavirus will **affect their shopping** in some form this year



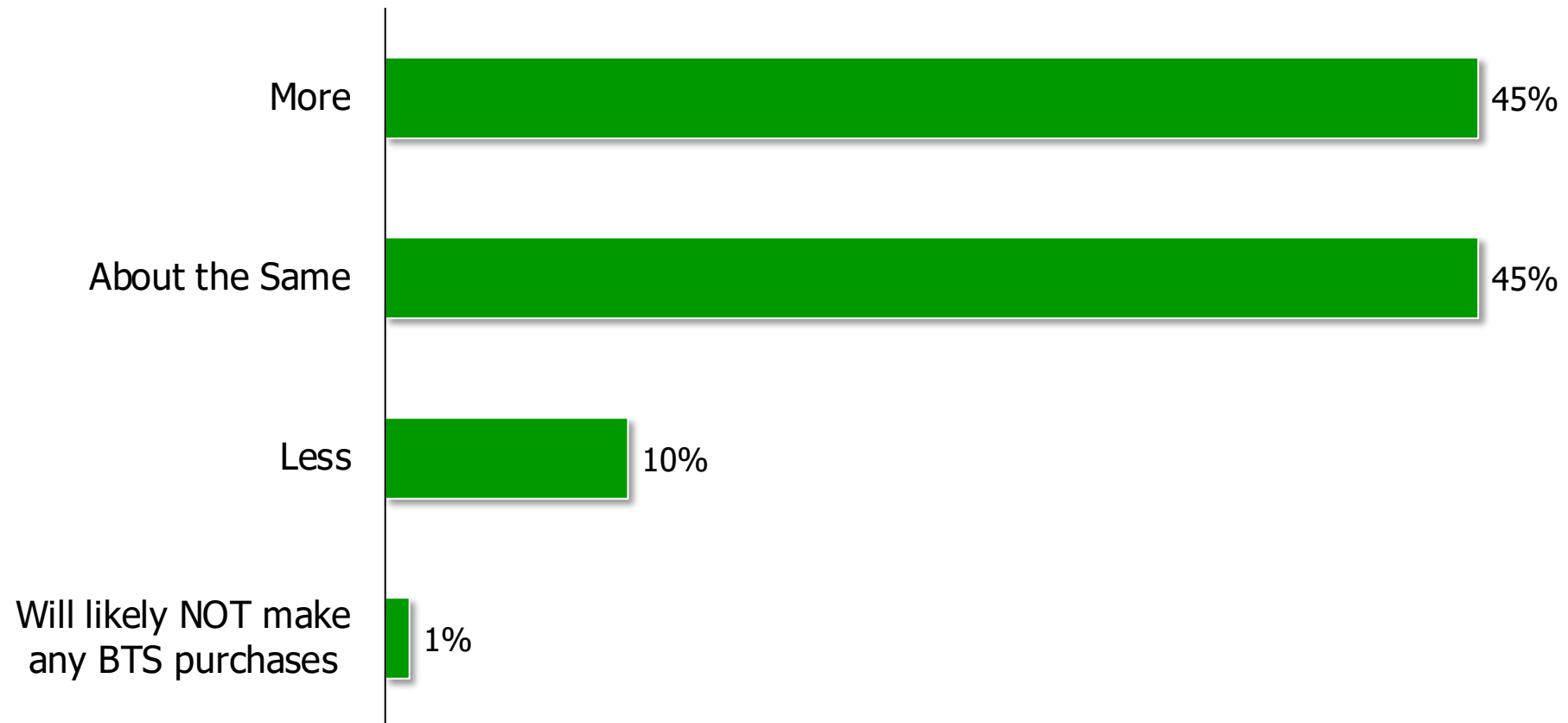
Back-to-Class Spending is Expected to Hit Record High

Total Expected Spending, *Billions*



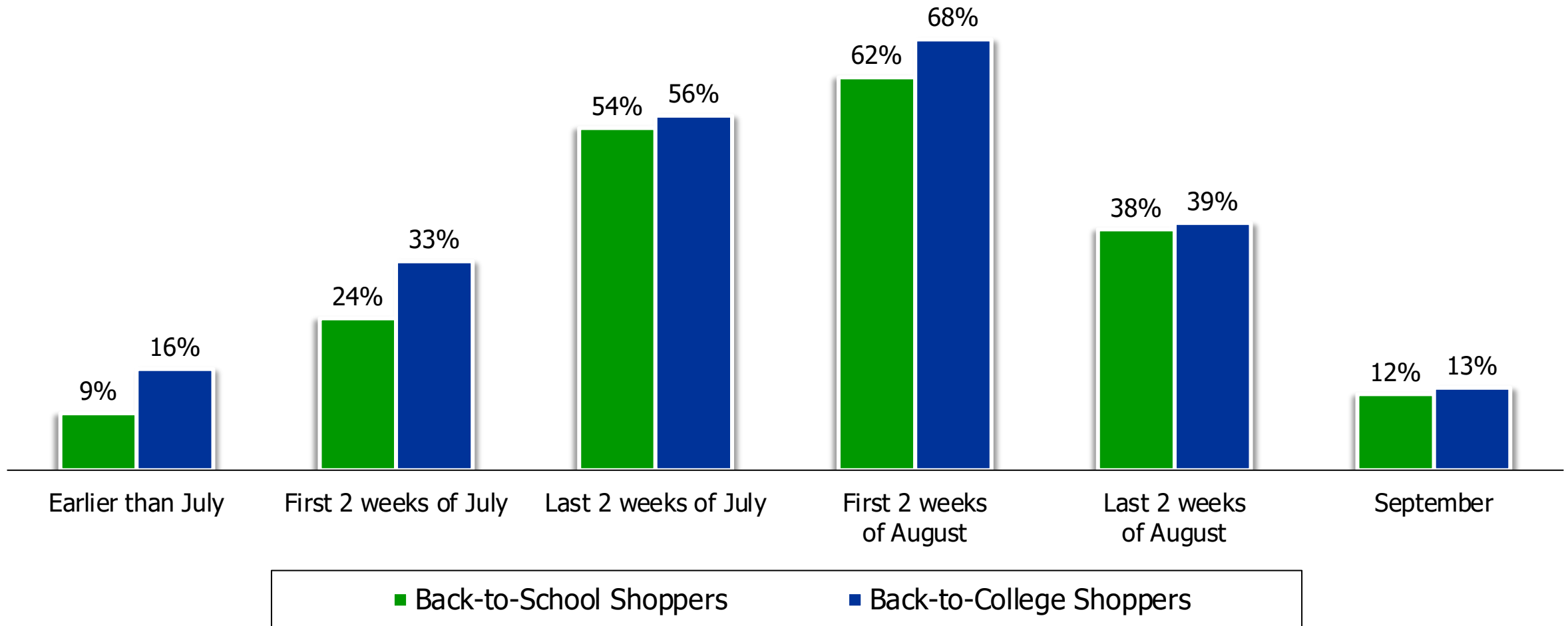
90% of Moms Will Spend the Same or More This BTS Season

Compared to last year, do you expect to spend more or less on BTS shopping in 2020?



Back-to-School/College Shopping Starts in Advance

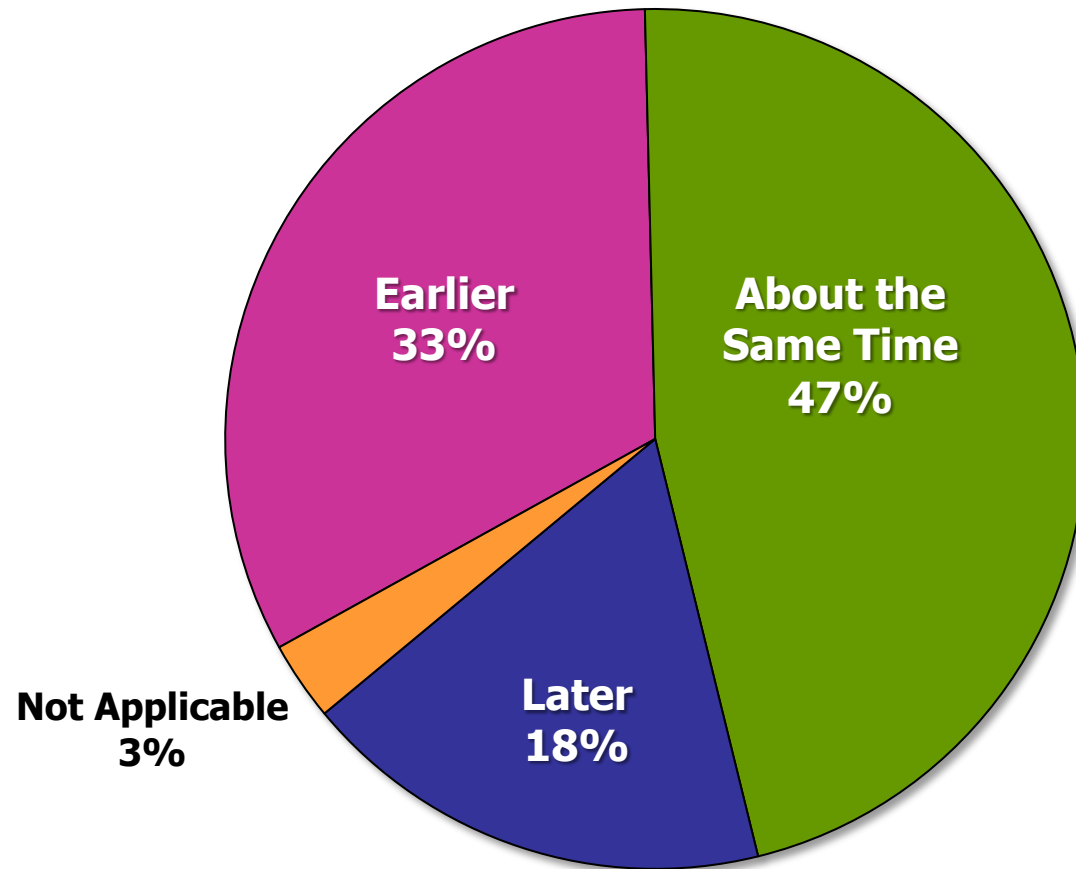
% of Shoppers Shopping During Each Time Period



Source: 2020 Deloitte – “Back to College Market Study” report; “Back-to-School Shopping” report. % of active BTS/BTC shoppers during noted period. “Out of \$__ you plan to spend on back-to-school/college shopping, how much do you plan to spend during the following periods?”

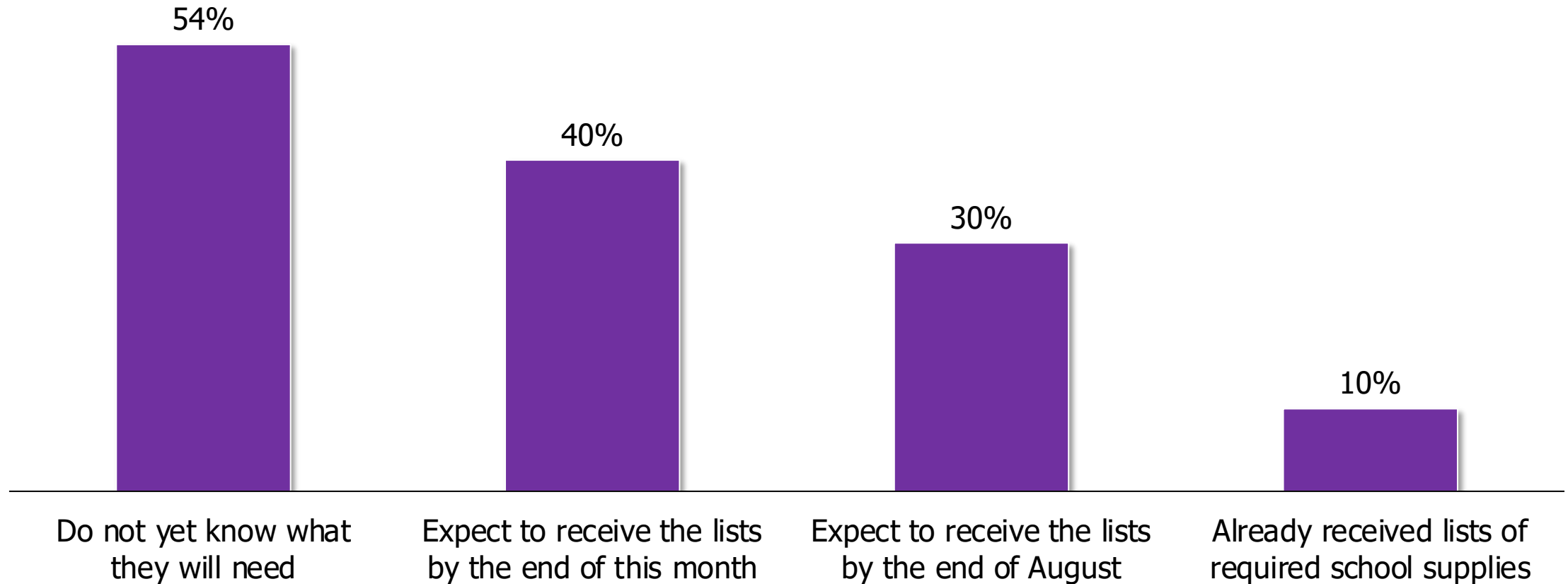
1/3 of Moms Plan to Shop Earlier Than Last Year

Compared to last year, when do you expect to shop for school supplies and/or attire for the 2020 BTS season?



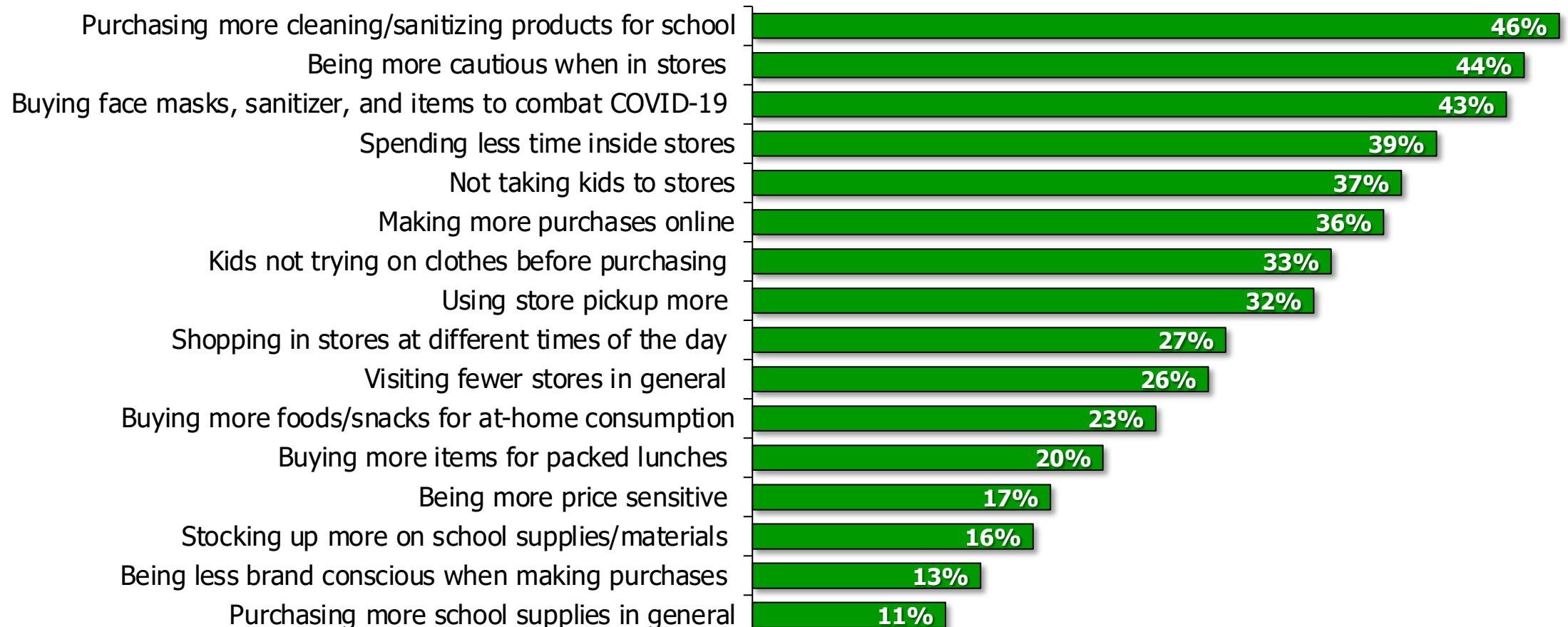
Unknown Reopening Plans Impact Consumer Spending

Back-to-school & college consumers with most of their shopping still left to do said it was because they...



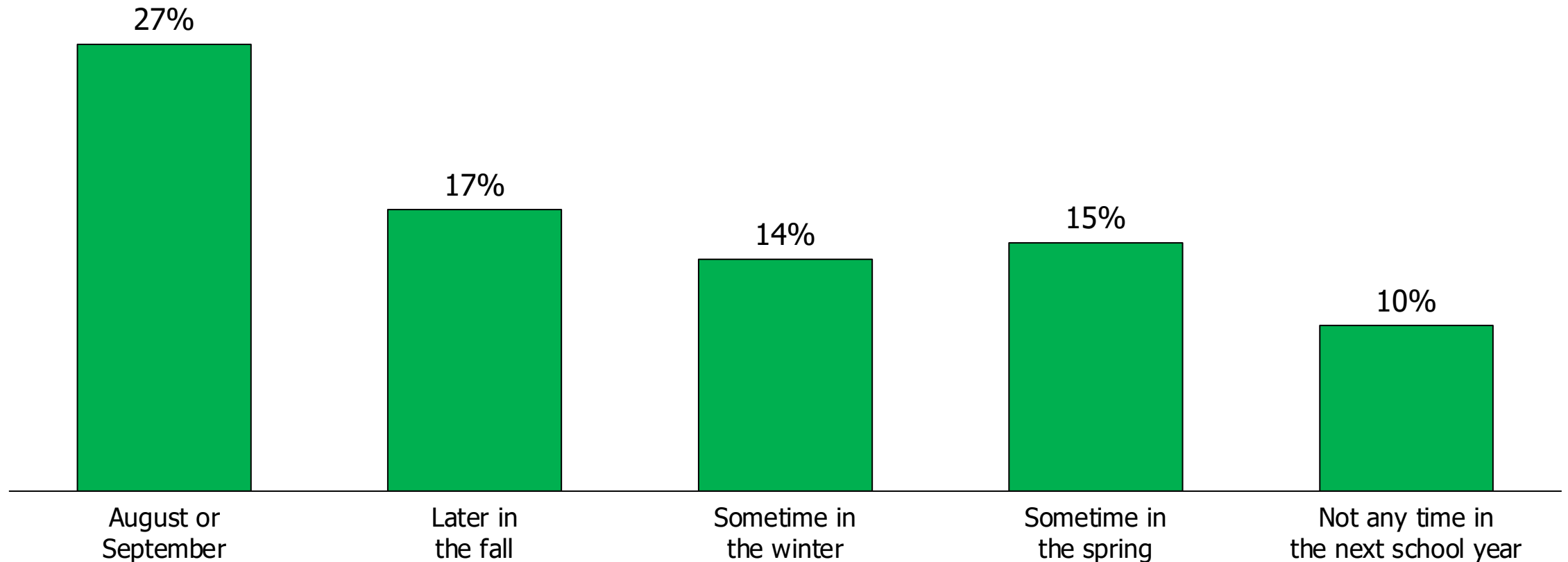
Moms of K-12 Students are Changing the Way They Shop Due to the Pandemic

How do you expect your BTS shopping to differ from last year?



Only 27% of Parents Feel Safe Sending Their Kids Back in August or September

When you think you will personally feel safe sending your children back to school for in-person classes next school year?



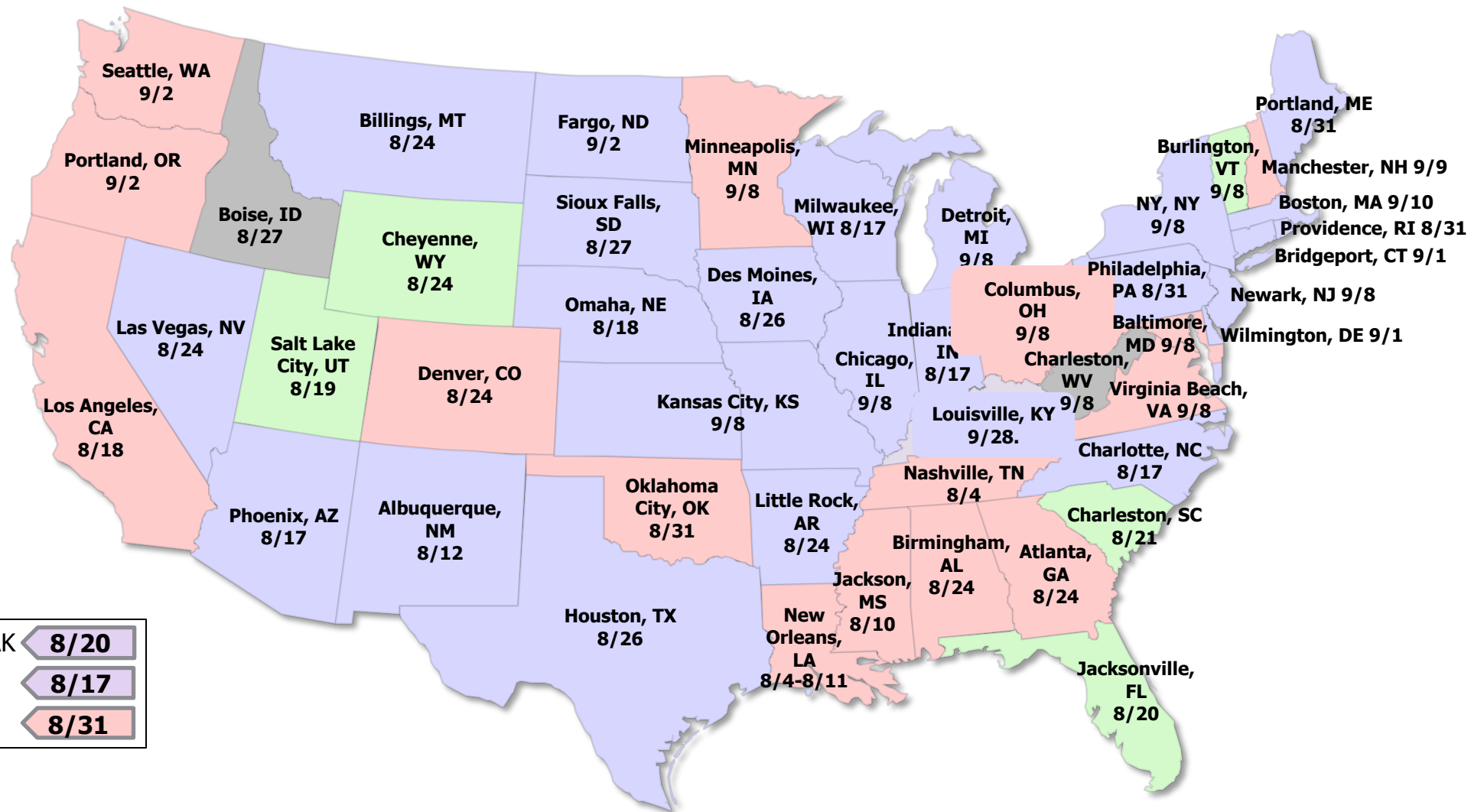
Source: Echelon Insights, a polling and survey firm, conducted weekly surveys of N = 500 parents of public school students in grades K-12. The surveys lasted roughly two months, from April 27 until June 18.

School Start Dates Vary from City to City

State's Most Populous City 2020 School Start Date & Learning Plan

**State's Most Populous City
Public School Fall 2020
Plan to Start the School Year**


- In-Person Learning
- Hybrid Learning
- Online Learning
- TBD



Anchorage, AK	8/20
Honolulu, HI	8/17
D.C.	8/31

School Start Dates & Guidelines Vary by City & State

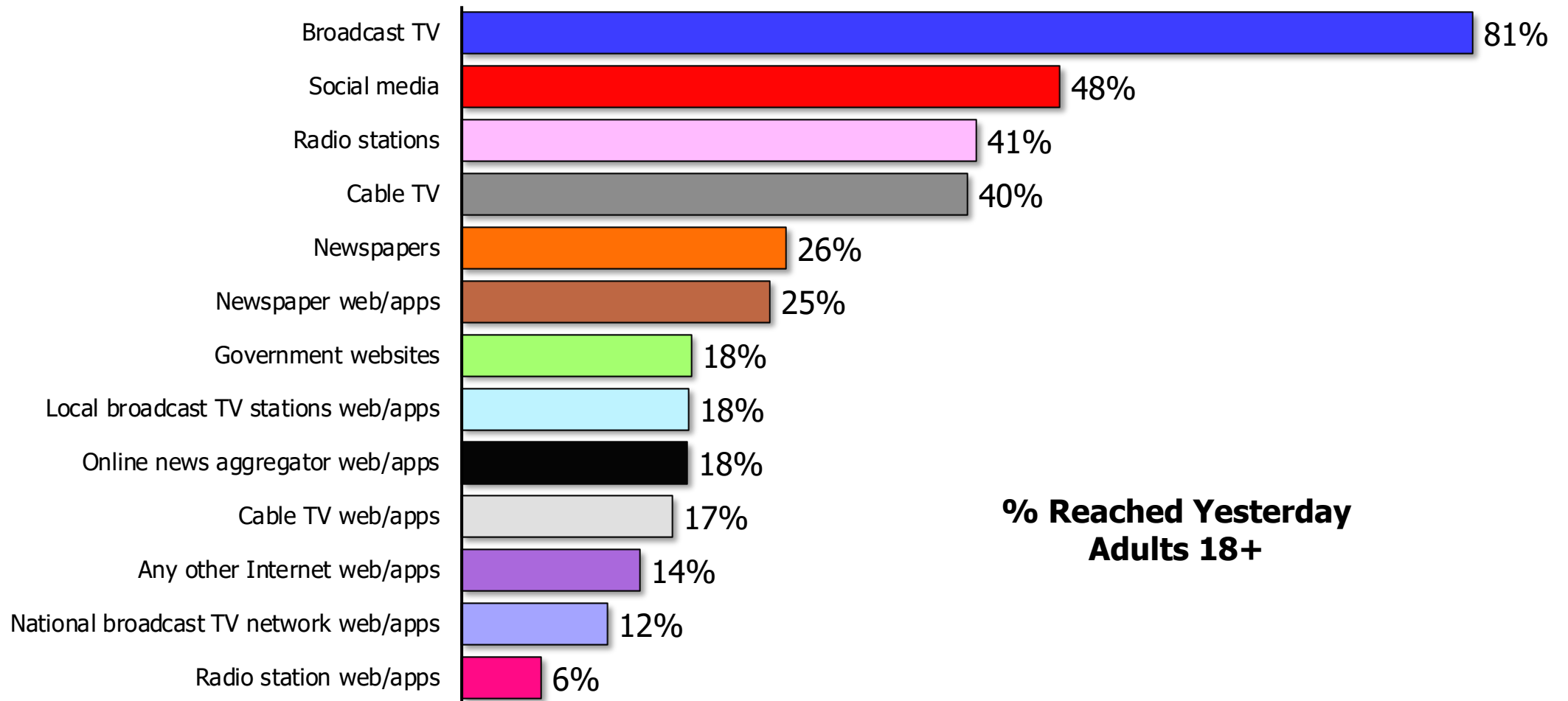
[Click Here to Get to the TVB's COVID-19 States School Fall Reopening State-by-State Summary](#)

 COVID-19 States School Fall 2020 Reopening Summary								
This excel sheet summarizes each state's guidelines as well as how the most populous city in each state are reopening their schools.								
Note: In almost all cases, state reopening guidelines are only guidelines and are not mandated by the state. It is up to each individual school district within a state to make a determination on how to open their schools.								
Updated August 11th, 2020								
State	Abr.	State's Most Populous City	State's Most Populous City Public School Original Fall 2020 School Start Date	Populous City Public School New Fall 2020 School Start Date If Delayed Due to COVID-19	City Public School Plan To Start The School Year (In-Person, Online Learning, Hybrid of in-person and online)	Does the State's Guidelines include In-Person Learning?	Does the State's Guidelines include Online Learning?	State's Guidelines for Fall 2020 School Year
Alabama	AL	Birmingham	8/24/2020	8/24/2020	Online learning	Y	Y	Birmingham City Schools will use online learning for the first 9 weeks of the school year starting on 8/24. At the end of the 9 weeks, the Birmingham City School District will reevaluate conditions as to whether to move forward with additional remote learning plans or to pivot to in-person/in-school learning. The rest of the state's local school districts will make their own determinations on how students will return to school in the fall. The state has issued guidelines/a roadmap that includes 3 options (in-person, online, and a hybrid). For each scenario, the state has documented a set of guidelines for educators to follow for best practices.
Alaska	AK	Anchorage	8/18/2020	8/20/2020	Hybrid of in-person and online	Y	Y	Alaska has issued guidelines for the reopening of schools which is scheduled for 8/20/20. There are three risk assessment classifications (Low, Medium, High) that should be used to determine which method or combination of methods should be used for K-12 schooling in Alaska. High risk includes more remote learning, social distancing, and other capacity restrictions for in-person learning. Medium and low risk prioritize safe in-person learning methods with less dependence or no provision for online learning.
Arizona	AZ	Phoenix	8/17/2020	8/17/2020	Hybrid of in-person and online	Y	Y	The Arizona Department of Education released guidance for reopening schools for the 2020-2021 school year. The guidance includes screening students before entry, face covering requirements, smaller class sizes, and the elimination of communal dining halls. Gov. Doug Ducey (R) ordered public schools to reopen for on-site learning on August 17 for students who have nowhere else to go. Superintendent Kathy Hoffman clarified that the order meant each school district must open at least one site for students to go, but did not have to open every school or require every teacher to work in-person. The superintendent recently said in a letter that "Arizona is not currently in a place to resume traditional in-person learning. Every indicator shows there is high community spread across the state. As school leaders, we should prepare our families and teachers for the reality that it is unlikely that any school community will be able to reopen safely for traditional in-person or hybrid instruction by August 17th." However, the governor hasn't changed the trajectory of the previously announced school reopening plan.
Arkansas	AR	Little Rock	8/13/2020	8/24/2020	Hybrid of in-person and online	Y	Y	For 2020-2021, Arkansas schools will implement a blended learning system that delivers curriculum, instructions and assessment through multiple methods with flexibility built into the framework. Depending on the course of the virus, the state has established levels of response that examine different factors including absentee trends and virus spread within communities to determine a response level. These levels include: Limited, Moderate, and Critical. Each response level focuses on communication and tracing, considerations for school closure and recommendations for continued on-site school operations.

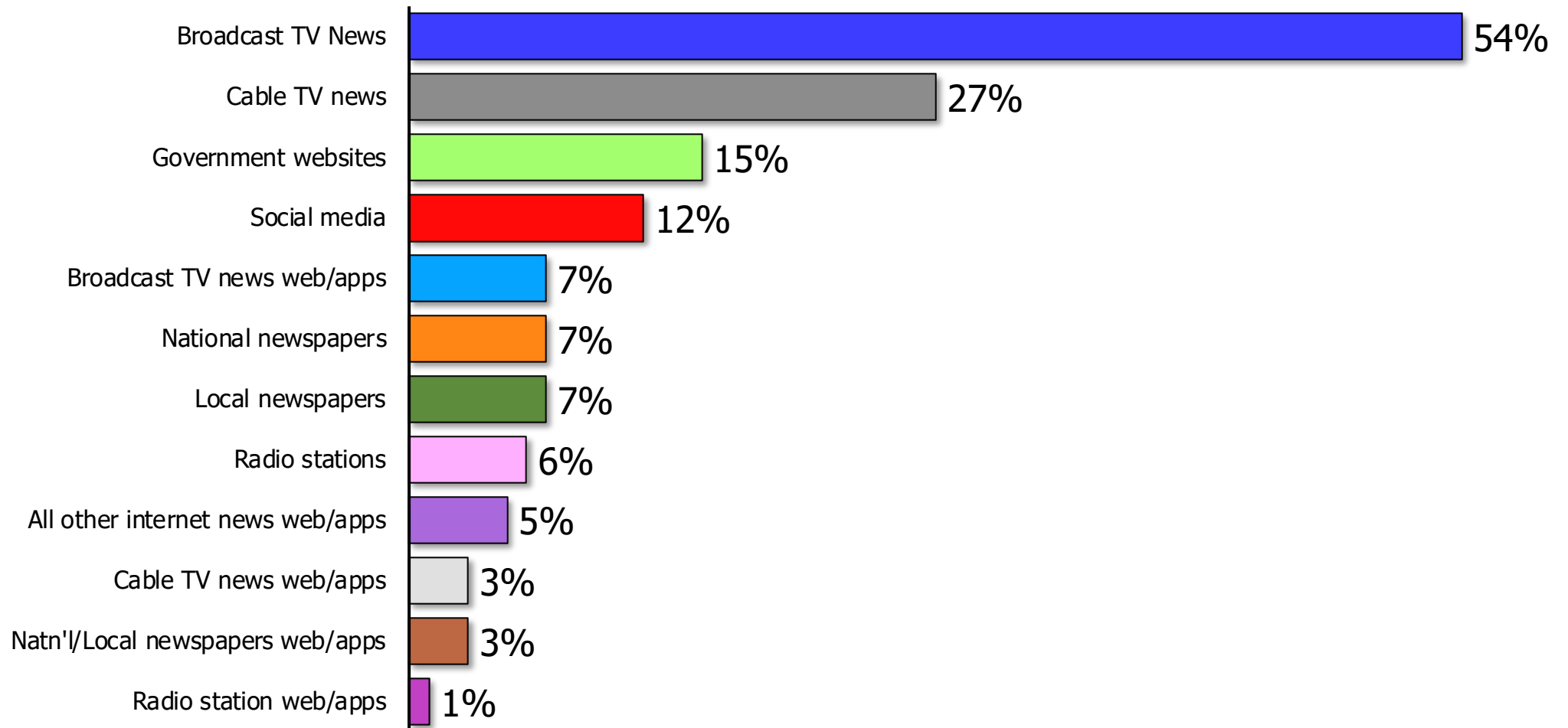
Broadcast Television is the Go-To Source For COVID-19 Information



Coronavirus Study: Broadcast TV Had The Highest Reach Among These Platforms



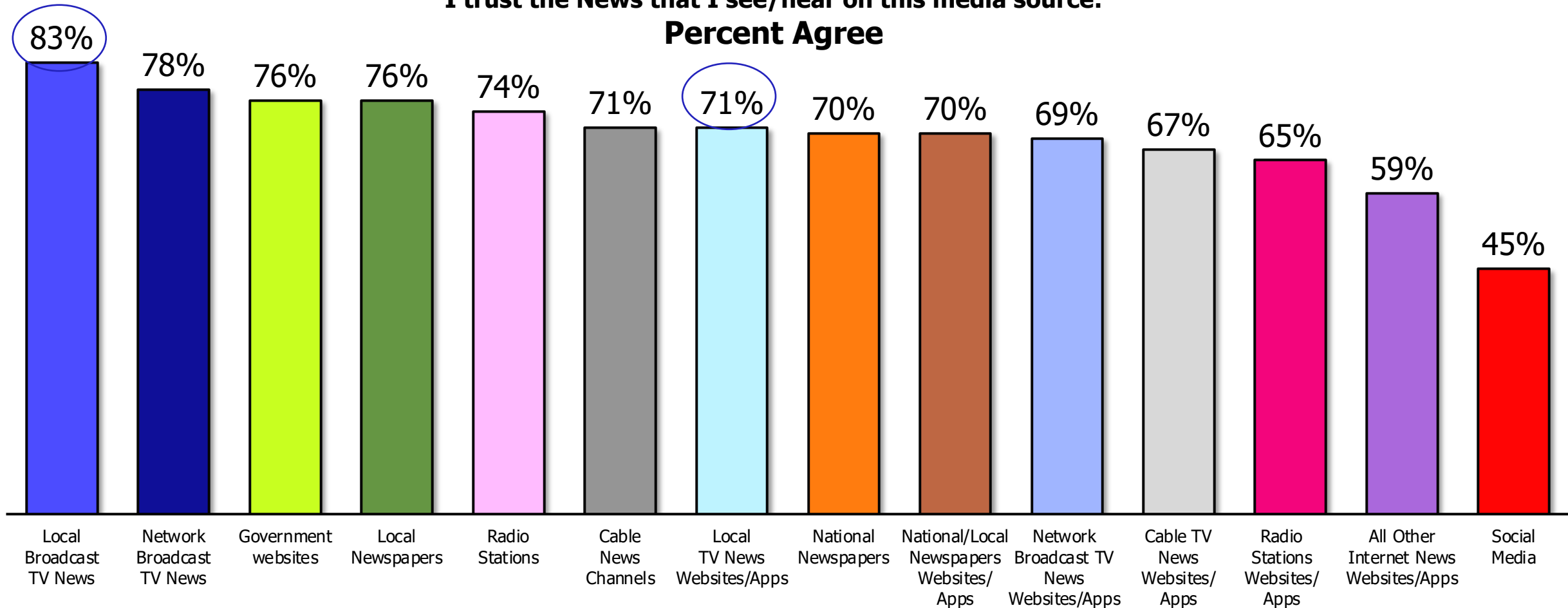
Which Source Do You Feel Gives You The Best Information & Updates On The Coronavirus?



Source: TVB/Dynata Coronavirus Media Usage Study April 2020 Total P18+ N = 10,042 (10 states: California, Florida, Georgia, Illinois, Louisiana, Michigan, New Jersey, New York, Texas, Washington)Q8: Which source do you feel gives you the best information & updates on the Coronavirus as it pertains to preventive procedures, closures, cancellations, and local regulations? Respondents could select up to two choices.

Local Broadcast TV News: #1 Trusted Source, Local TV Websites/Apps: #1 Trusted Digital Source

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



Source: TVB/Dynata Coronavirus Media Usage Study April 2020 Total P18+ N = 10,042 (10 states: California, Florida, Georgia, Illinois, Louisiana, Michigan, New Jersey, New York, Texas, Washington)Q9: For each source, please indicate the extent to which you agree or disagree with the following statement: I trust the news I see/hear on this media source; Top 2 boxes shown

What Are Your Reasons For Watching Local Broadcast TV News As It Relates To The Coronavirus?

Reasons	% P18+
I want information that pertains to the area I live in	67%
I trust the news from my local broadcast station	45%
I want to know the status of public/medical services, curfews, school closings, business closings, traffic conditions, public transit, local regulations	45%
I feel my local broadcast station is looking out for what I need to know and will keep me safe	31%
I like that they are constantly updating and giving me the latest information	31%
I like that they are reporting from different neighborhoods affected	25%
I share information I get from my station with friends/family	20%
I like that they visually show areas affected	18%
I want to know how I can help	10%

Broadcast Websites Provide Multi-platform Opportunities



What Are Your Reasons for Using Local Broadcast TV Websites/Apps as it Relates to the Coronavirus Pandemic?

Reasons	% P18+
I trust the news from my local broadcast stations' website/app	53%
I want to know the status of public/medical services, curfews, school closings, business closings, traffic conditions, public transit, local regulations	50%
I like that I can get at the information I need on my timetable	46%
I like that they are constantly updating and giving me the latest information	40%
I share information I get from my broadcast station's website/app with friends/family	31%
I like that I can access it wherever I am	28%
I downloaded the app from my local broadcast TV station specifically for situations like this	25%
I like getting the alerts	25%
I want to know how I can help	9%

Source: TVB/Dynata Coronavirus Media Usage Study April 2020 P18+ N = 10,042

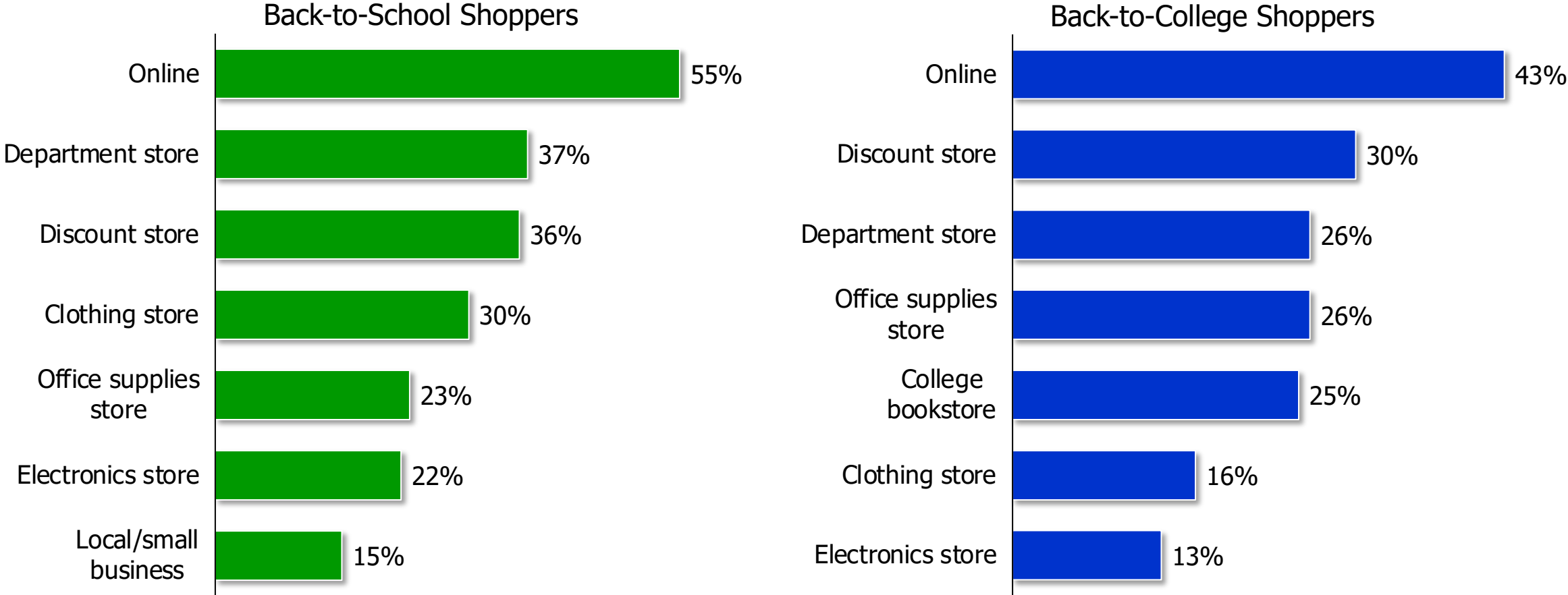
Q11: What are your reasons for using local broadcast TV news websites/apps as it relates to the Coronavirus?

43% of Back-to-School &
College Consumers are
Planning to Shop
More Online



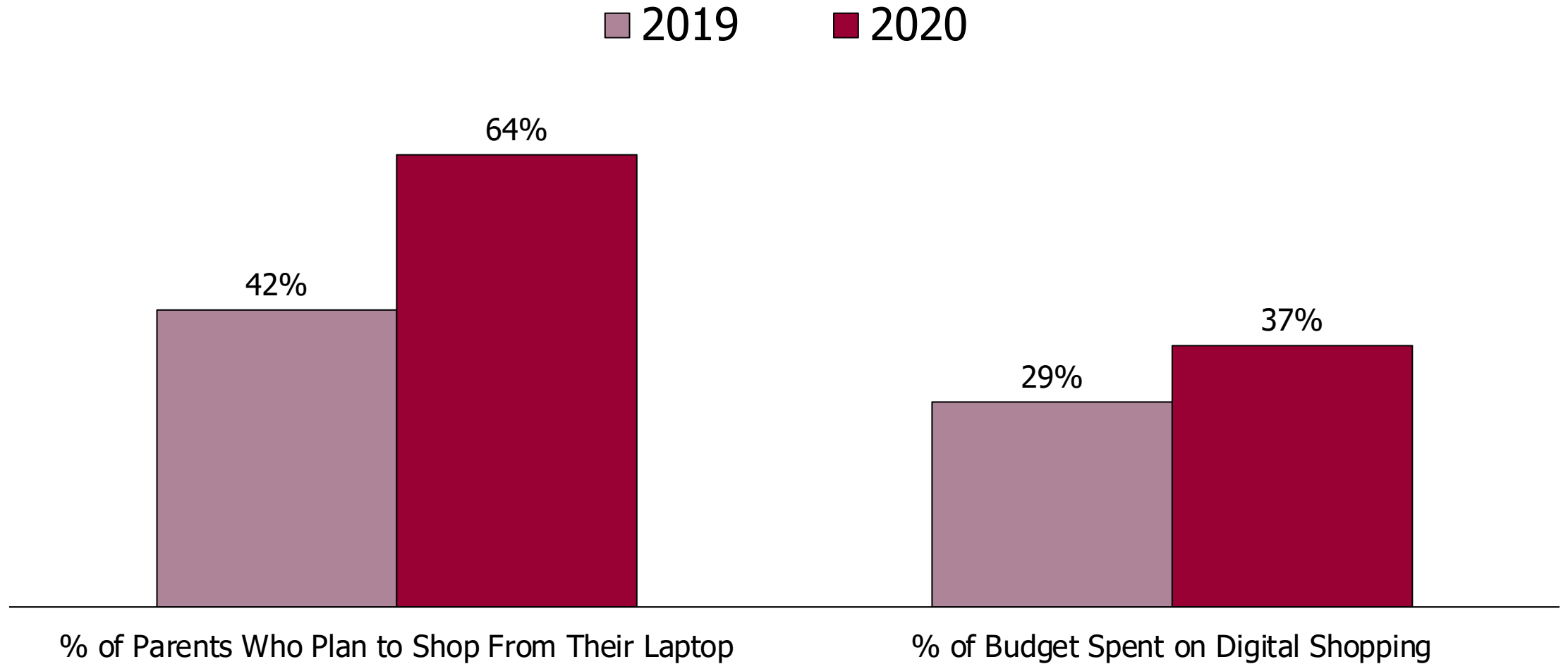
Back-to-Class Consumers Will Look to Shop Online More than Anywhere Else This Year

Where Consumers Plan to Shop



Source: NRF 2020 Back-to-School/College Spending Survey

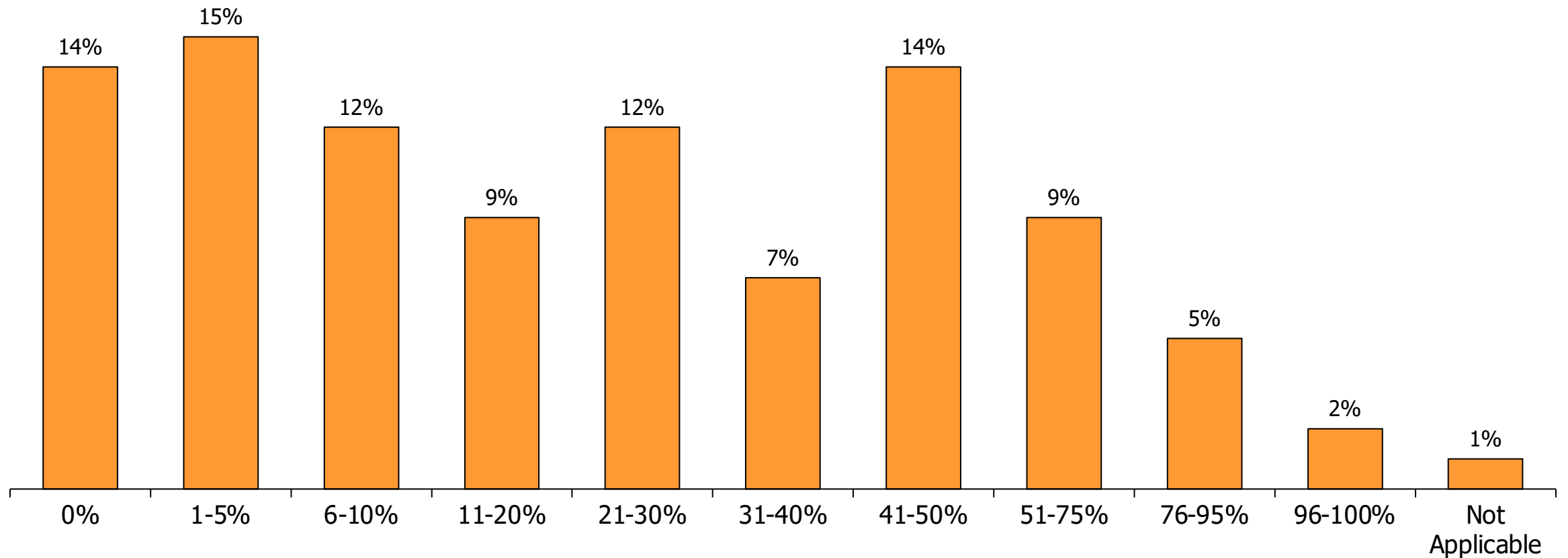
Online Will See More of Parent's Time and Budget



Source: 2020 Deloitte – “Back-to-School Shopping” report. % of active BTS shoppers during noted period.

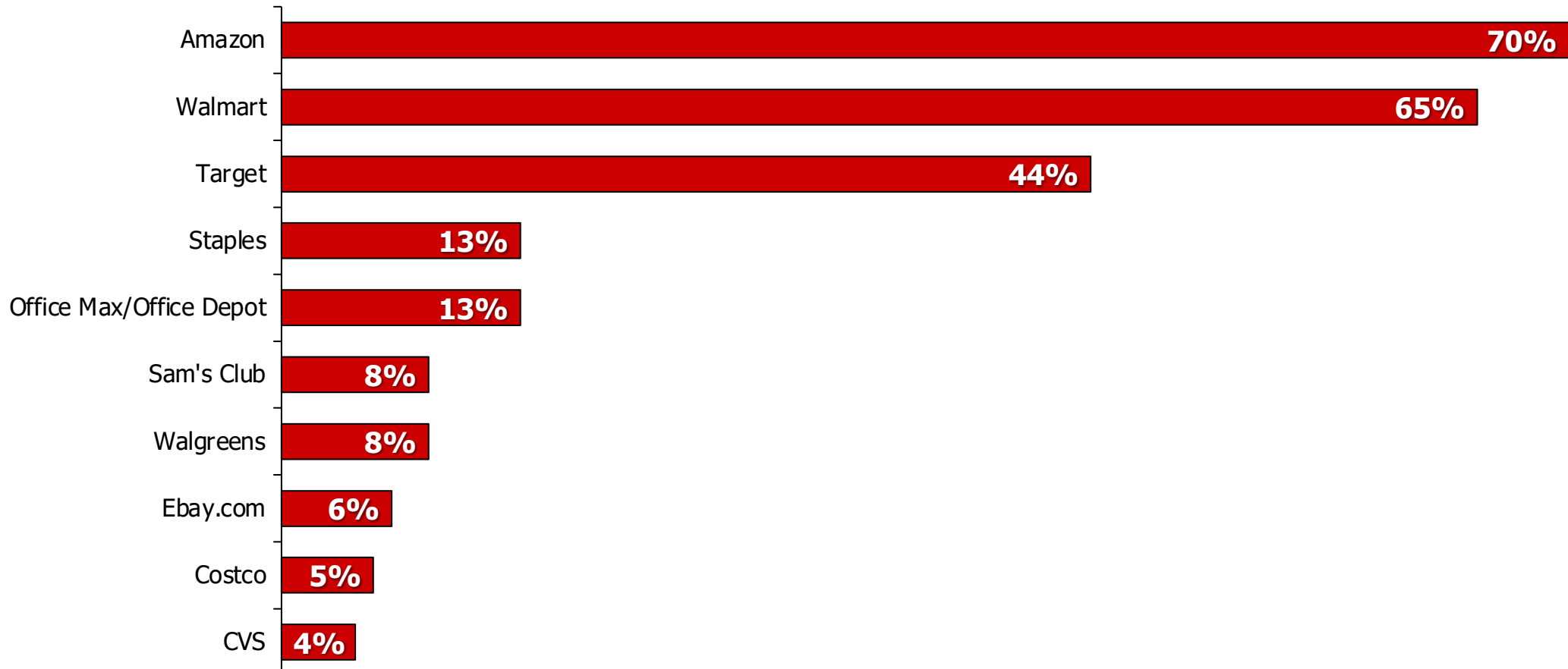
Moms Anticipate to Shop Online This Year

Approximately what percentage of school supplies do you estimate your household will purchase ONLINE for BTS 2020?



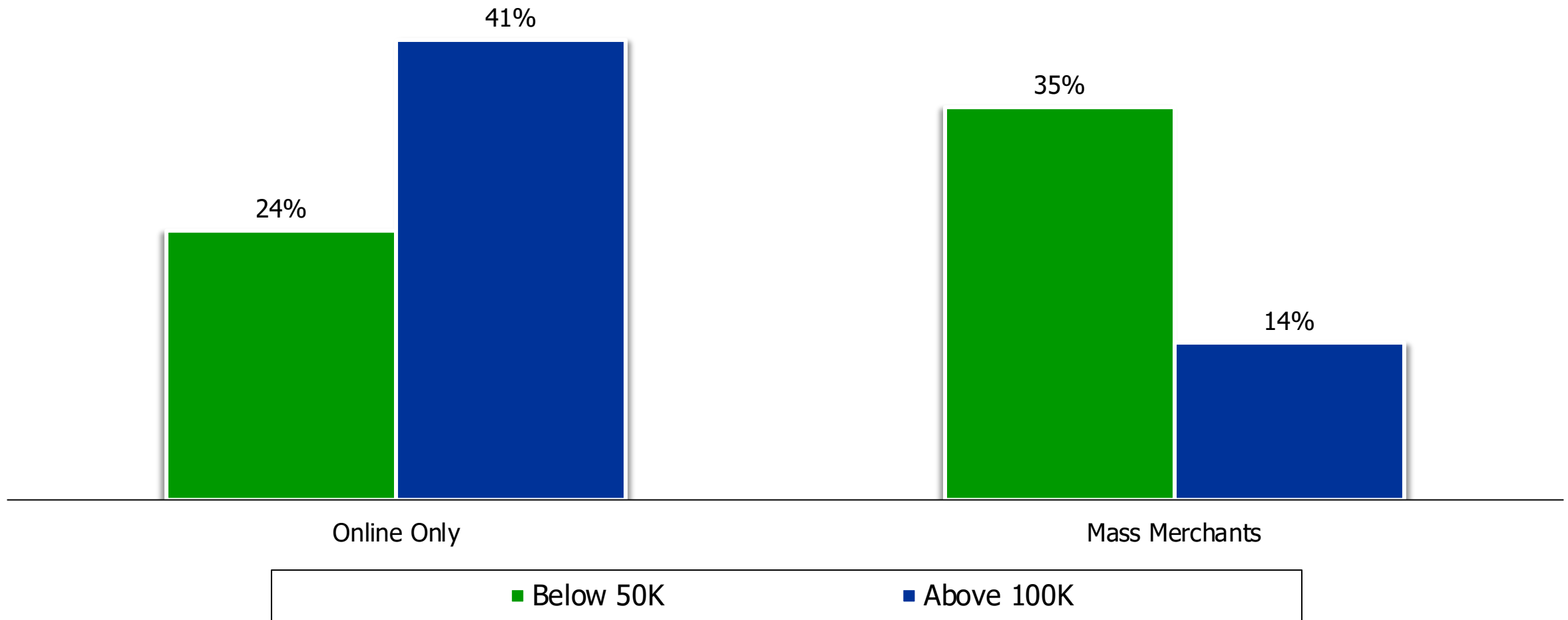
Moms Chose Amazon as the 2020 Top Online Retailer for School Supplies

Which ONLINE RETAILERS do you expect to purchase school supplies from for the 2020 BTS season?



Online Shopping Appeals to Higher Income Shoppers

% of Income-level's Preferred Retail Format



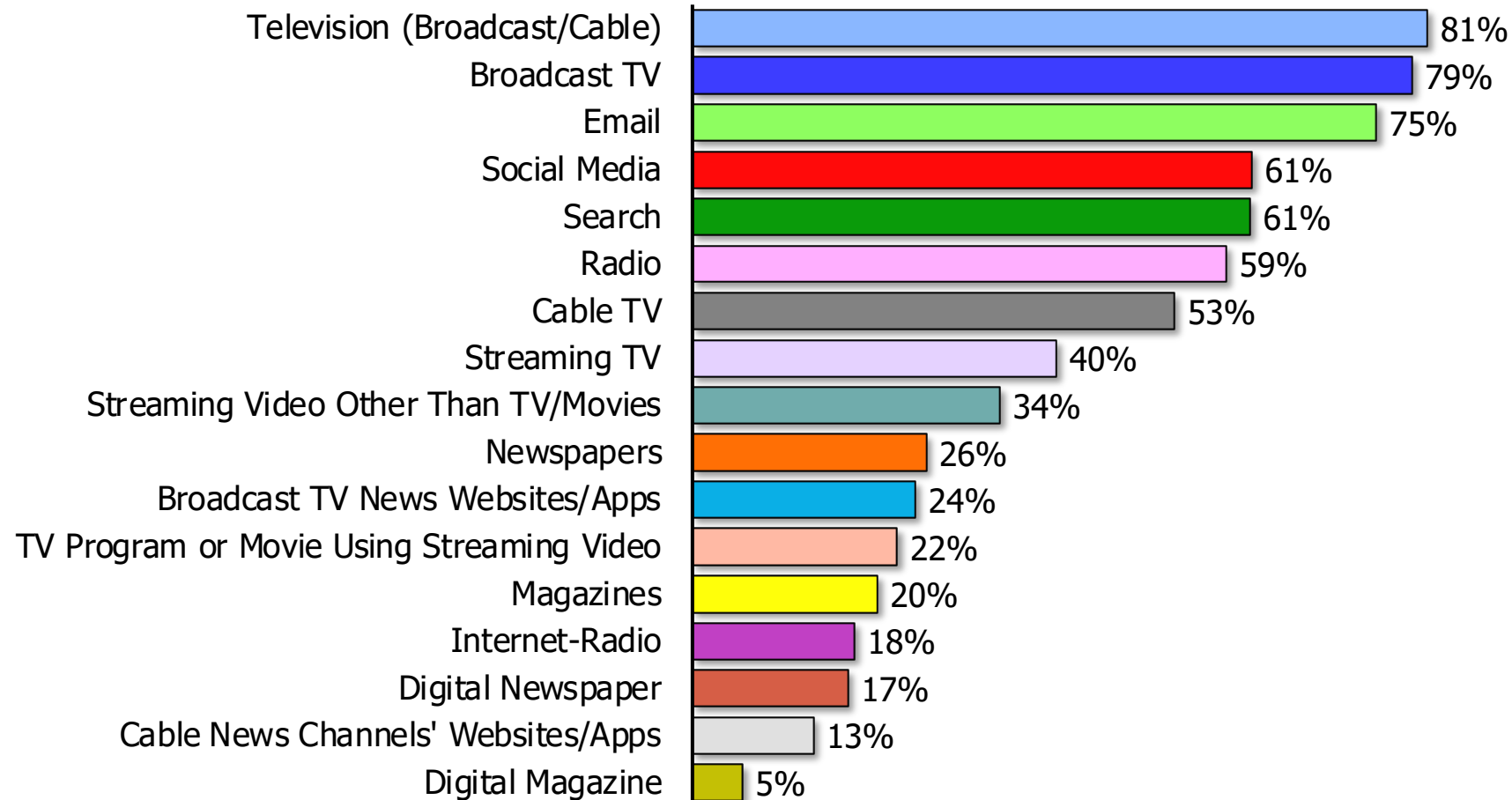
Source: 2020 Deloitte –“Back-to-School Shopping” report. “Which type of retailer will you shop the most electronic gadgets at during this BTS season?”

Broadcast Television Delivers Online Shoppers



Among Online Shoppers, TV Has Highest Reach of Ad Supported Platforms – Broadcast Leads the Way

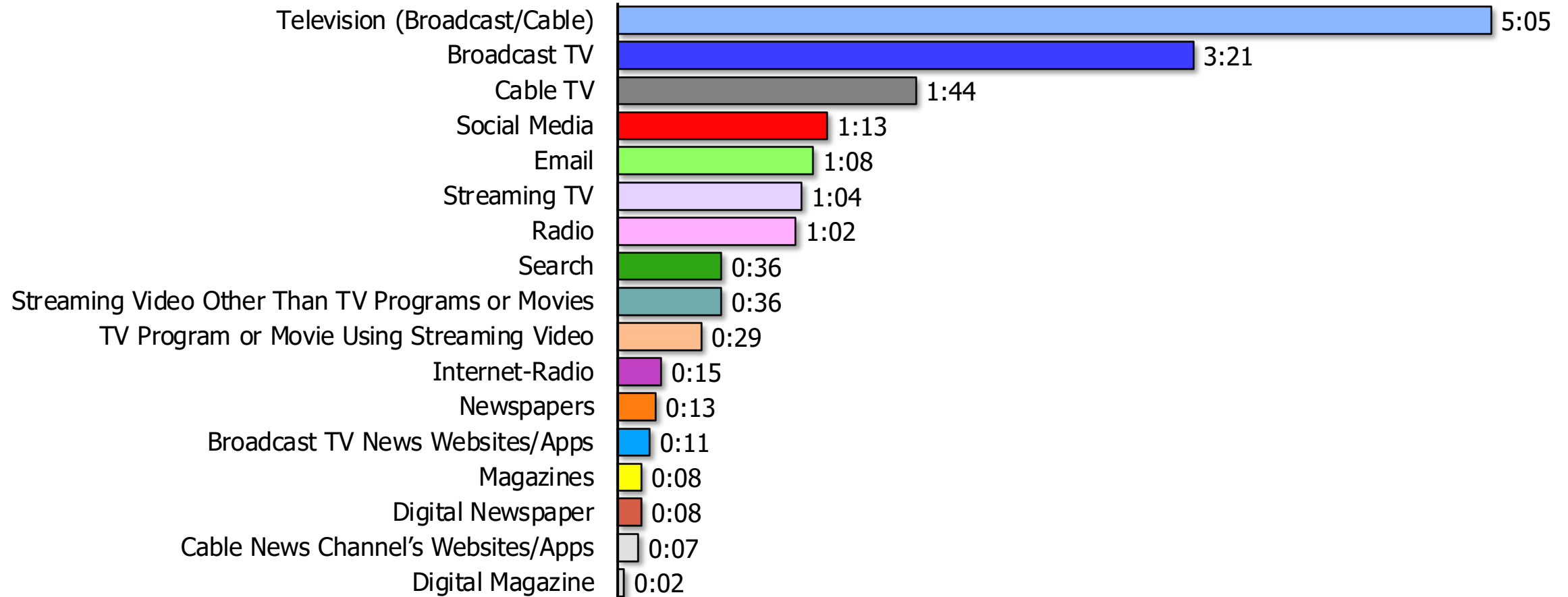
**% Reached Yesterday
Adults 18+ Online Shoppers**



Source: GfK TVB Media Comparisons Study 2020. M-S 5A-1A. Persons 18+ Plan in the next month, to do any shopping online (n=1,602): Yes. 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.

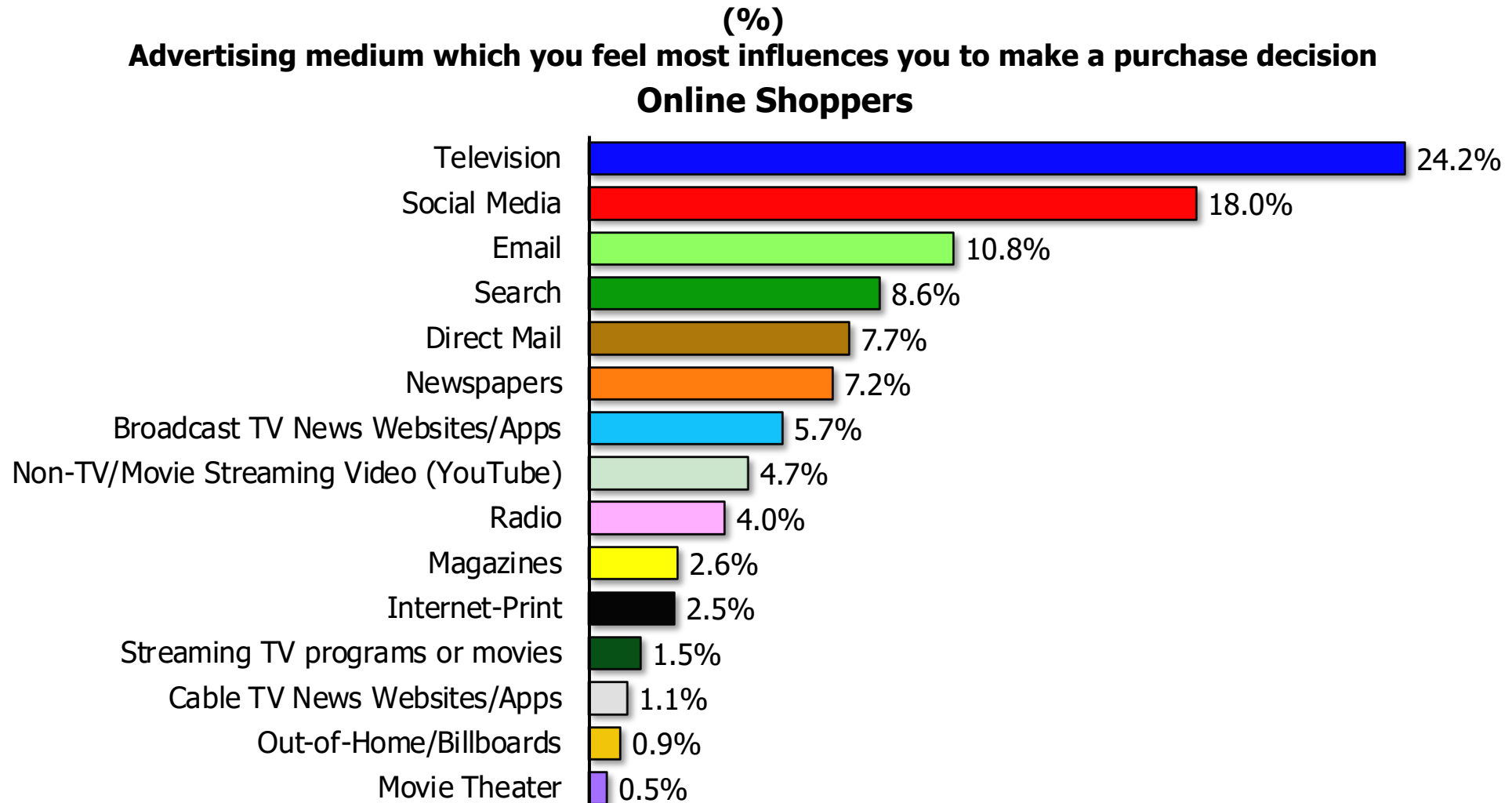
Online Shoppers Spend the Most Time with Television of All Ad Supported Platforms

Daily Time Spent Yesterday (In Hours:Minutes)
Online Shoppers



Source: GfK TVB Media Comparisons Study 2020. M-S 5A-1A. Persons 18+ Plan in the next month, to do any shopping online (n=1,602): Yes. 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.

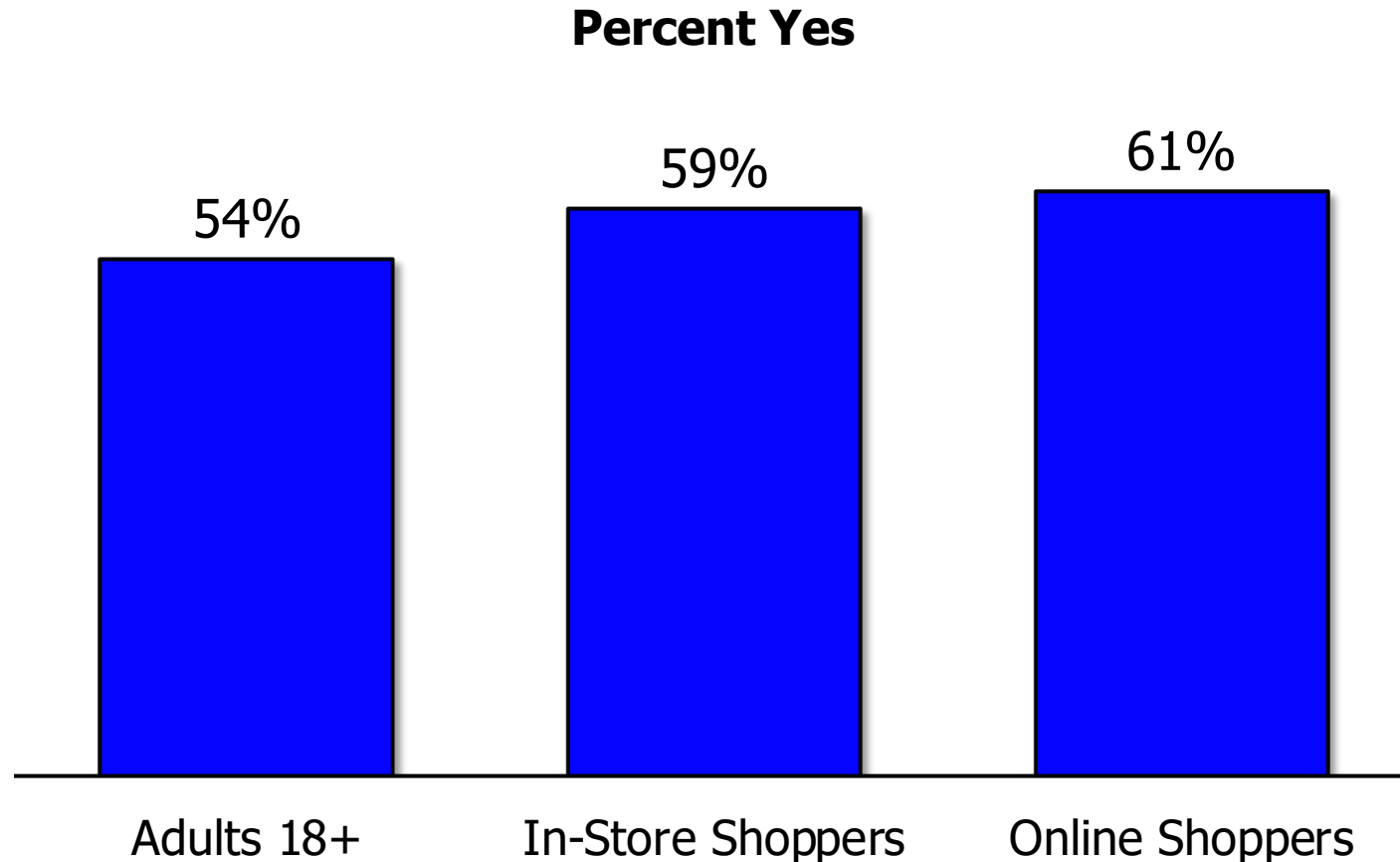
Television Ads Are The Top Medium That Influences Purchase Decisions For Online Shoppers



Source: GfK TVB Media Comparisons Study 2020. Persons 18 + Plan in the next month, to do any shopping online (n=1,602): Yes. Includes only those who chose a media. Q1 - 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.

For Online and In-Store Shoppers, Television Ads Are Motivation To Do Further Research Online

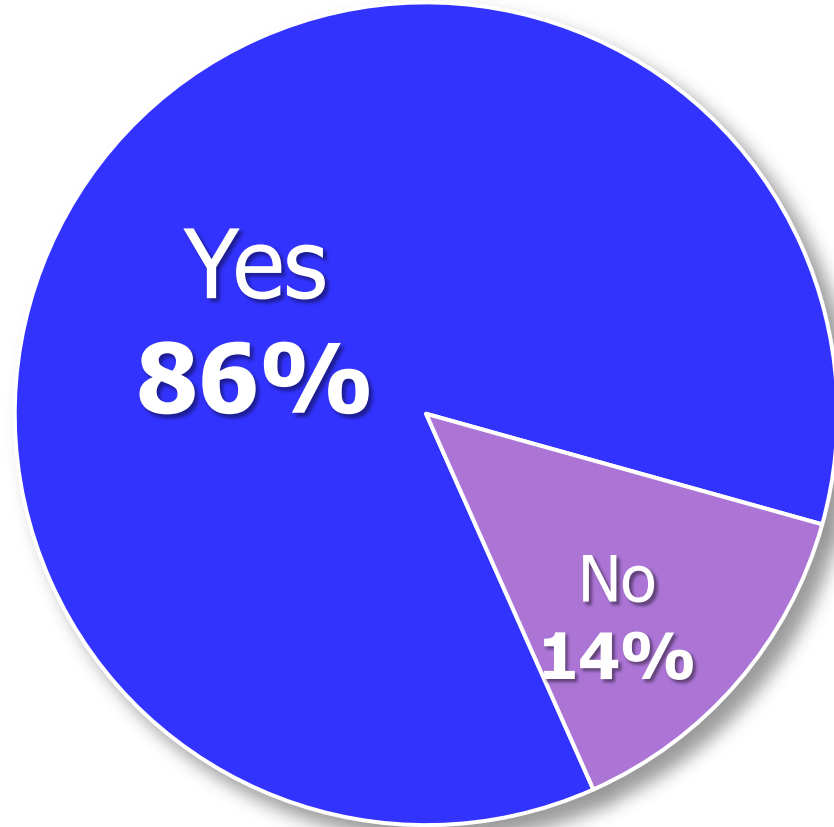
Has an advertisement on television motivated you to go the Internet to find out more information about that product or service?



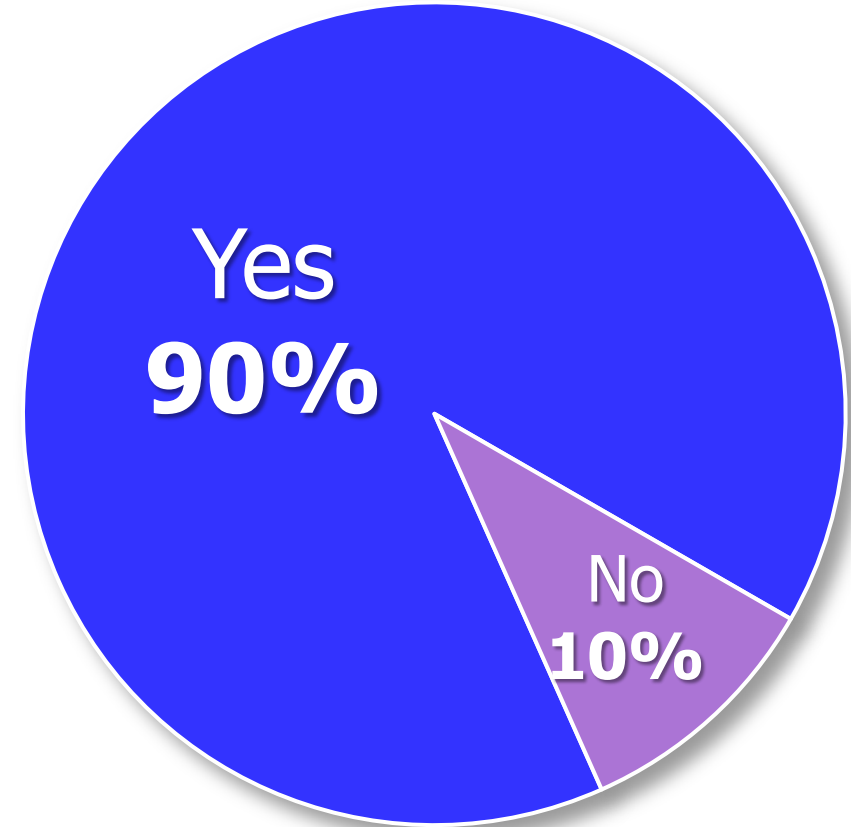
Source: GfK TVB Media Comparisons Study 2020. Persons 18+ Plan in the next month, to do any shopping in a retail store (n=1,625) or online (n=1,602): Yes. Includes only those who answered. Q3 - Has an advertisement on television motivated you to go the Internet to find out more information about that product or service?

“Have TV ads influenced your search selections?”

Moms



A18-24



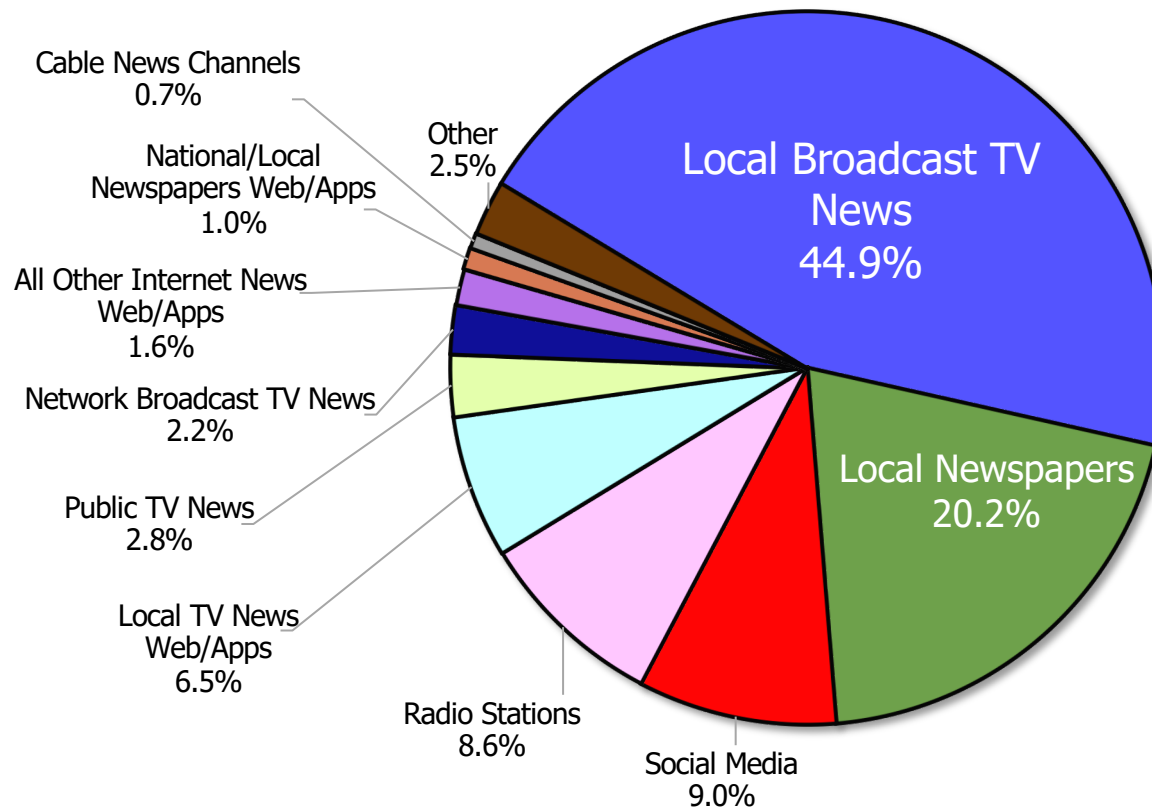
Source: GfK TVB Purchase Funnel 2019. A18-24, N = 619; Moms (Women 18+ with presence of any children), N= 1,362.

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.

Online Shoppers say Local Broadcast Television News Is Most Involved In The Community

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

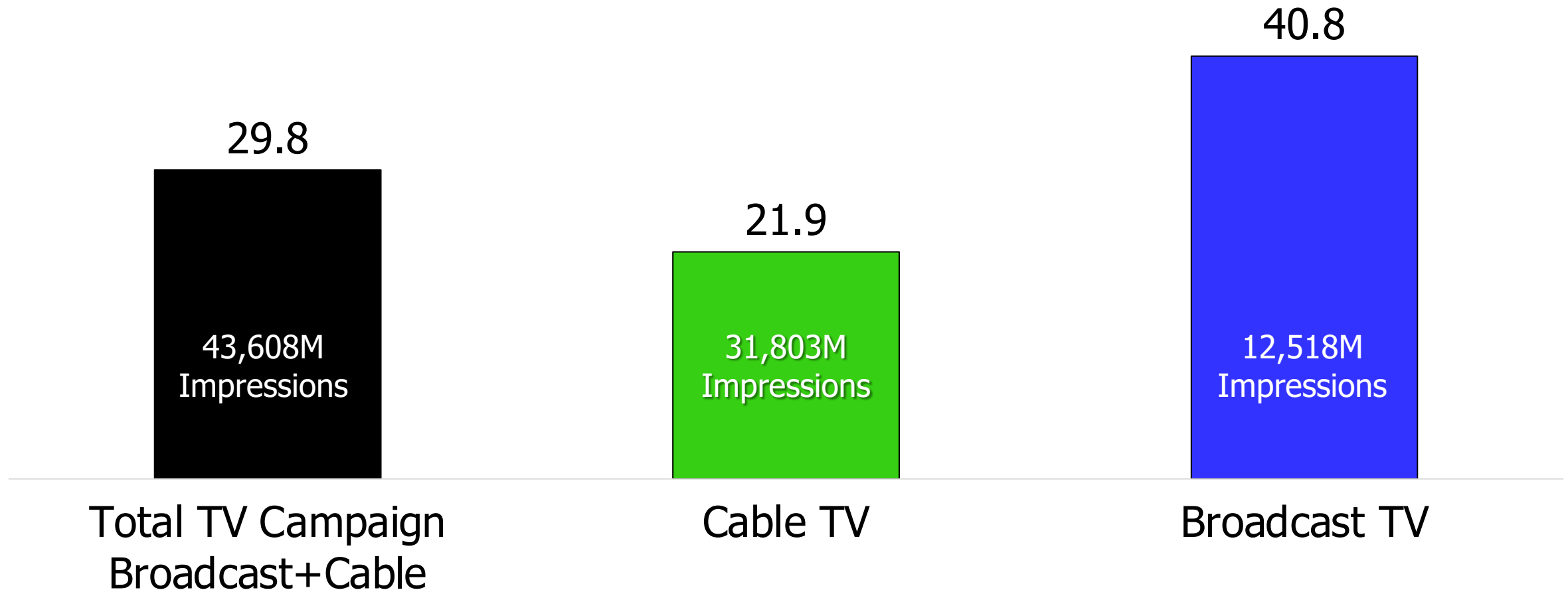
Online Shoppers



Source: GfK TVB Media Comparisons Study 2020. Persons 18+ Plan in the next month, to do any shopping online (n=1,602): Yes. Includes only those who chose a media. Q8 - And, which source of news do you feel is the most involved in your community?

Retailer: Broadcast had about Double Cable's Lift Rate in Website Traffic

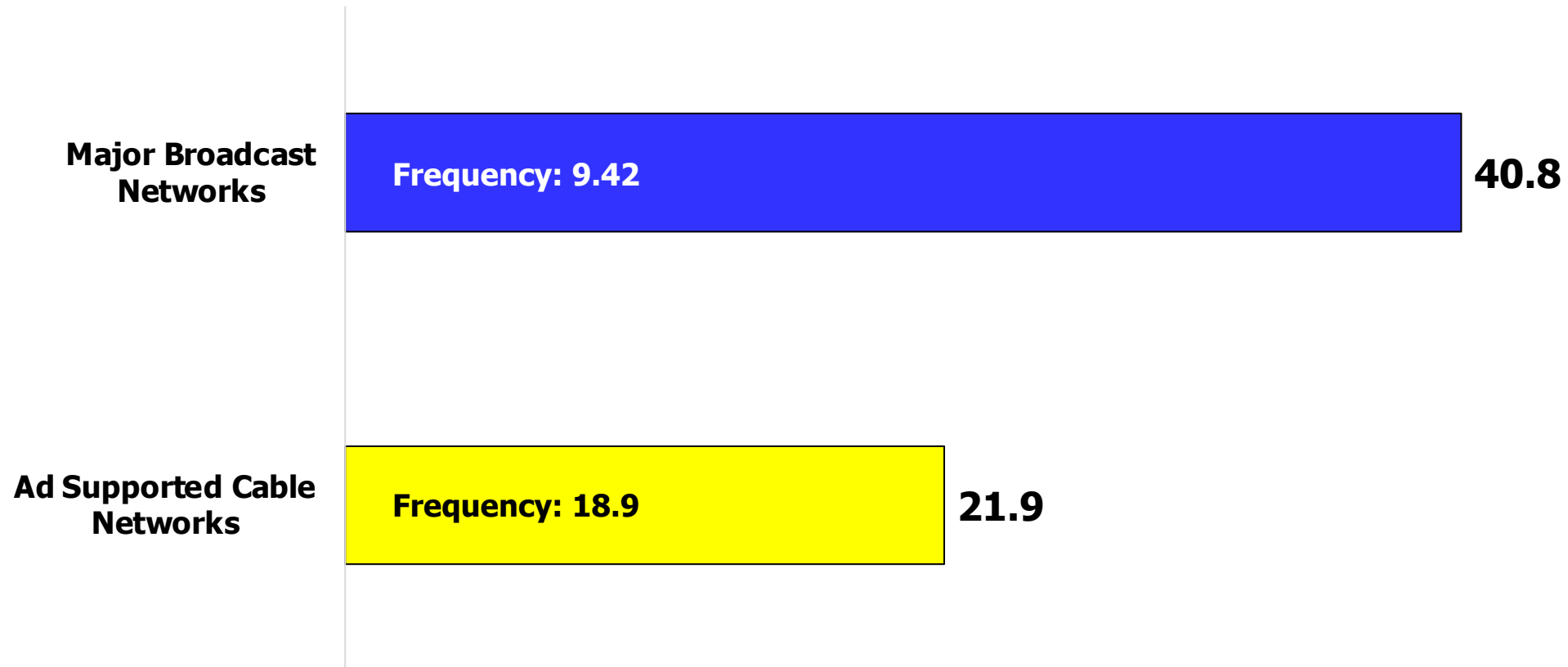
Conversion Lift Rate to Website



Source: TVB Data Plus Math Attribution Study 2020, Measured 4 months July-October

Broadcast Delivered About Double The Web Conversion Rate With Half Frequency of Cable

Retailer TV Campaign Frequency Vs. Conversion Lift Rate

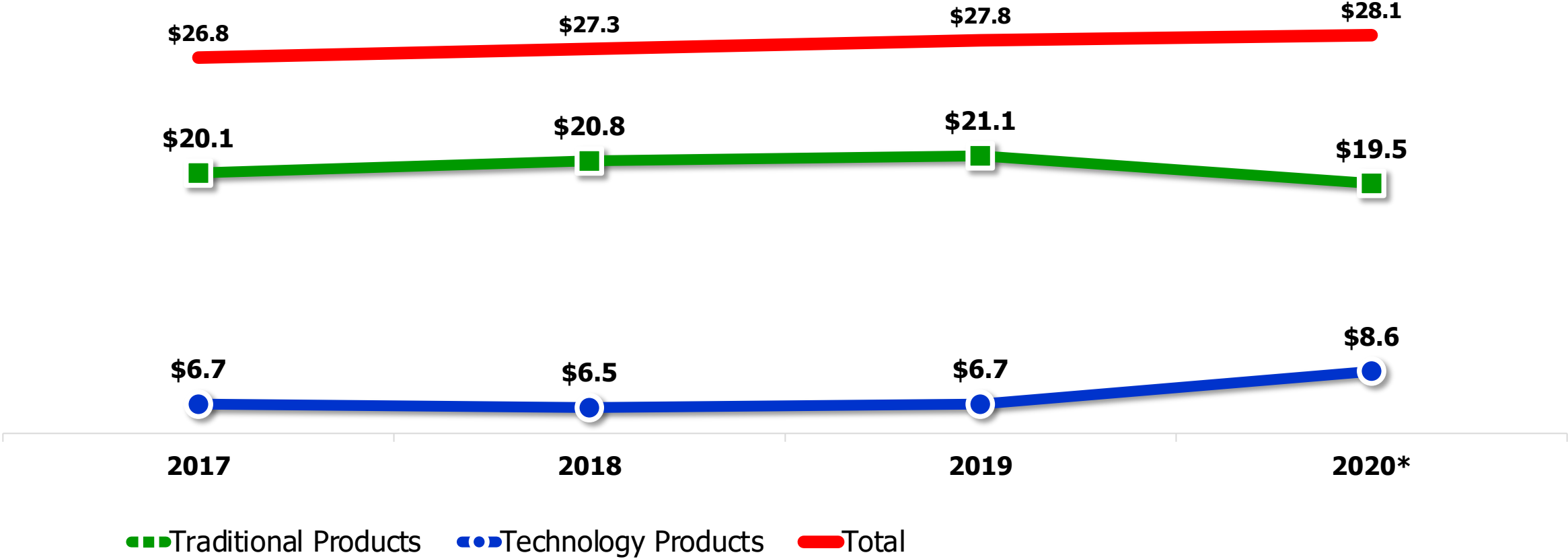


The Pandemic has an Effect on **What's Being Purchased**



Technology Purchases Increase While Traditional Products Fall

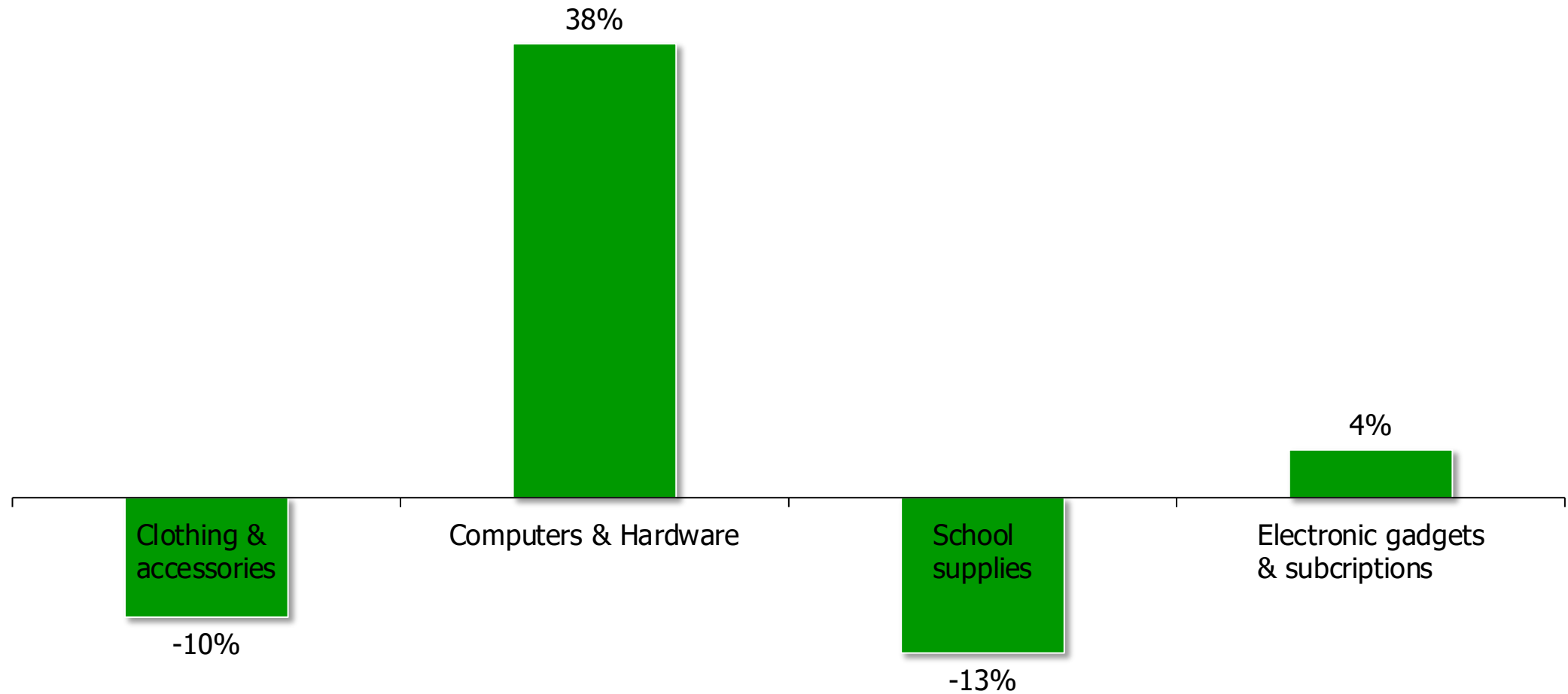
Total Expected Spending, *Billions*



Source: 2020 Deloitte –“Back-to-School Shopping” report. *Personal hygiene products and desk/tables were newly added in 2020, which is counted in the “traditional products” and “total” calculations.

Major Shifts in Spending Between Purchases

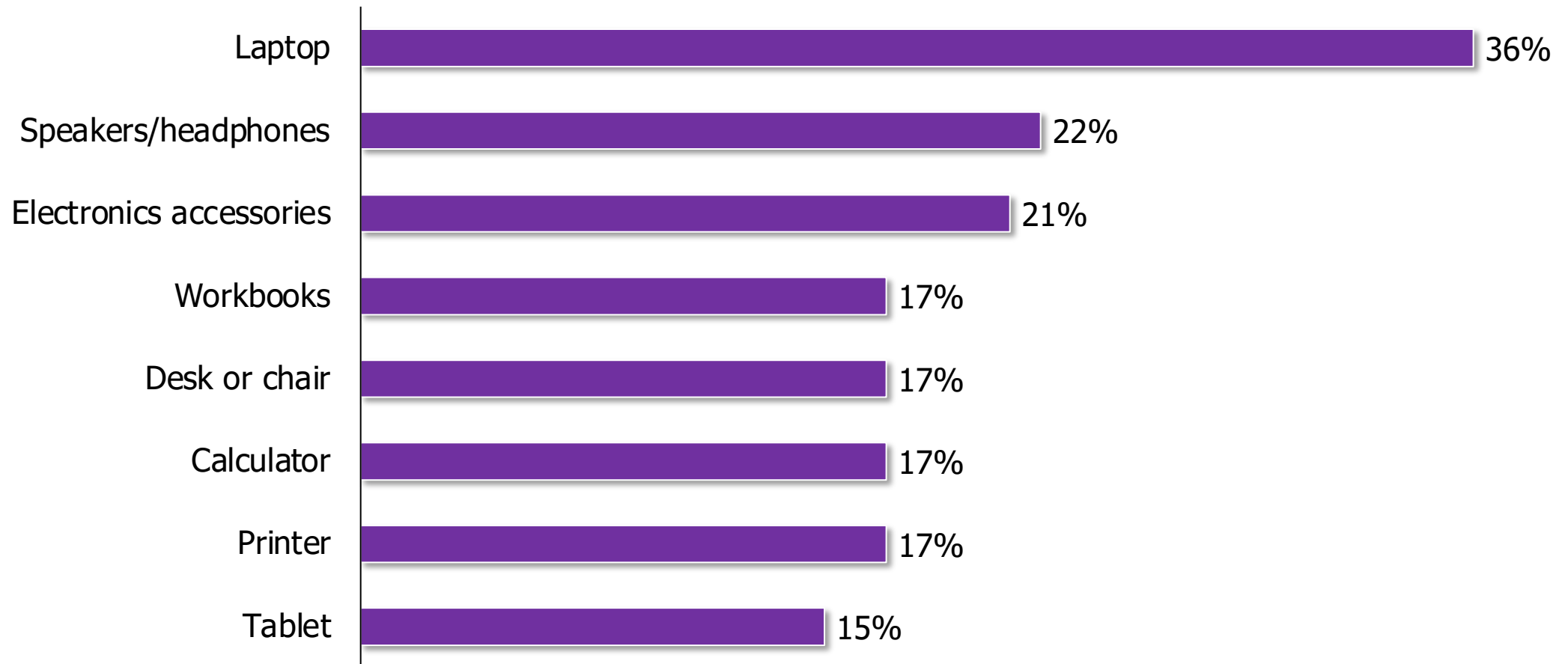
% Change in Average Spending from 2019 to 2020



Source: 2020 Deloitte – “Back-to-School Shopping” report. Average spend includes only respondents who will purchase the above-mentioned category or item. All currency values are in US dollar.

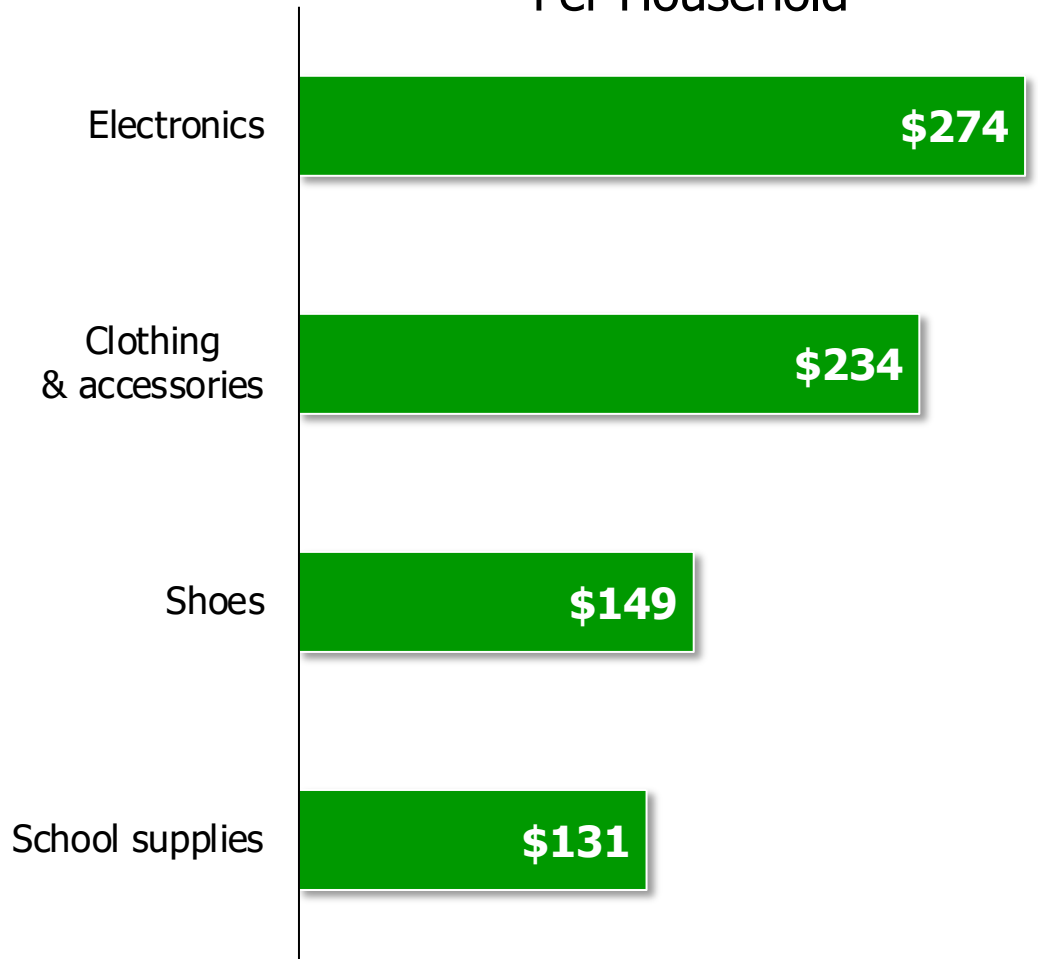
Consumers Will Buy Electronics Specifically to Accommodate E-Learning

Items Consumers Plan to Buy Specifically Due to e-learning

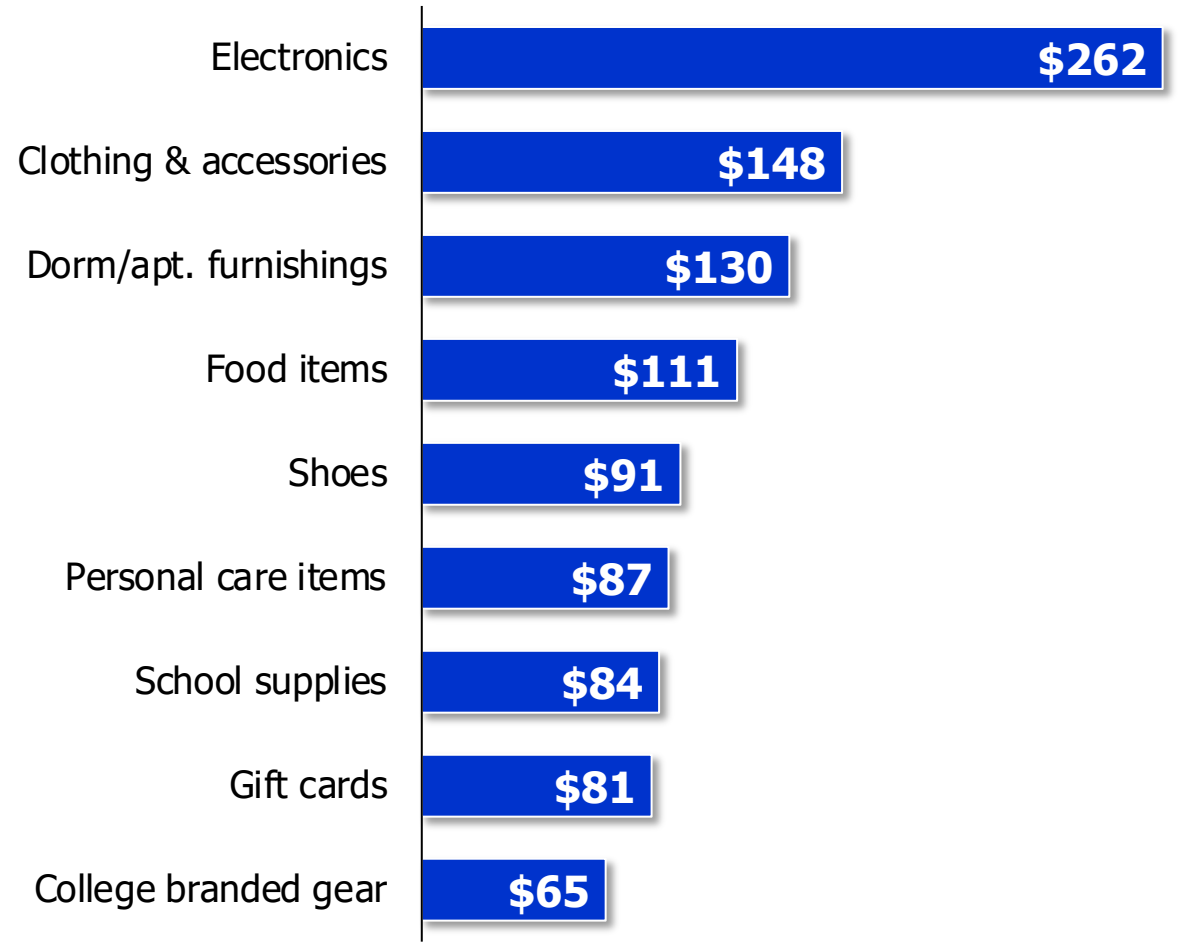


Planned Household Spend by Category

Back-to-School Planned Spending Per Household

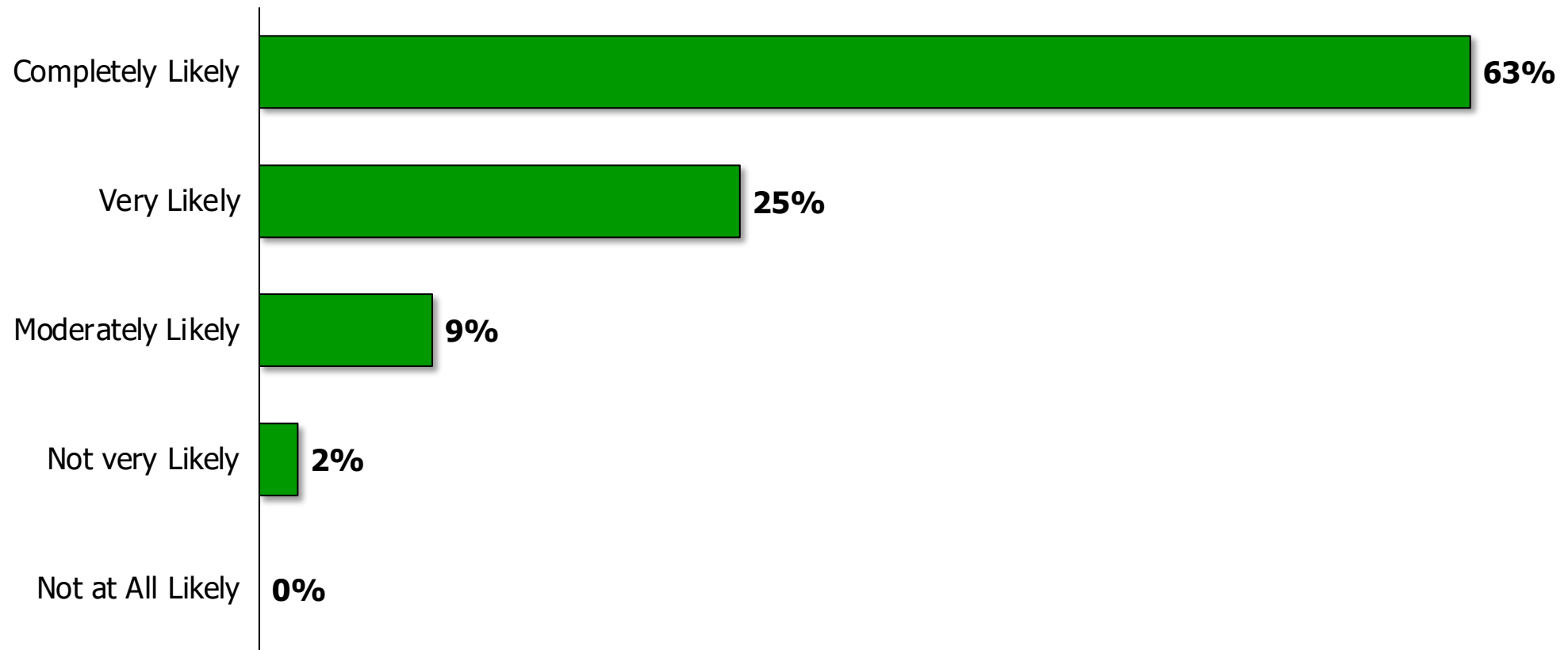


Back-to-College Planned Spending Per Household



Coronavirus Will Not Stop Moms From Purchasing New Clothes/Attire for the BTS Season

How likely are you to purchase clothes and/or footwear for your kids during the 2020 BTS shopping season?

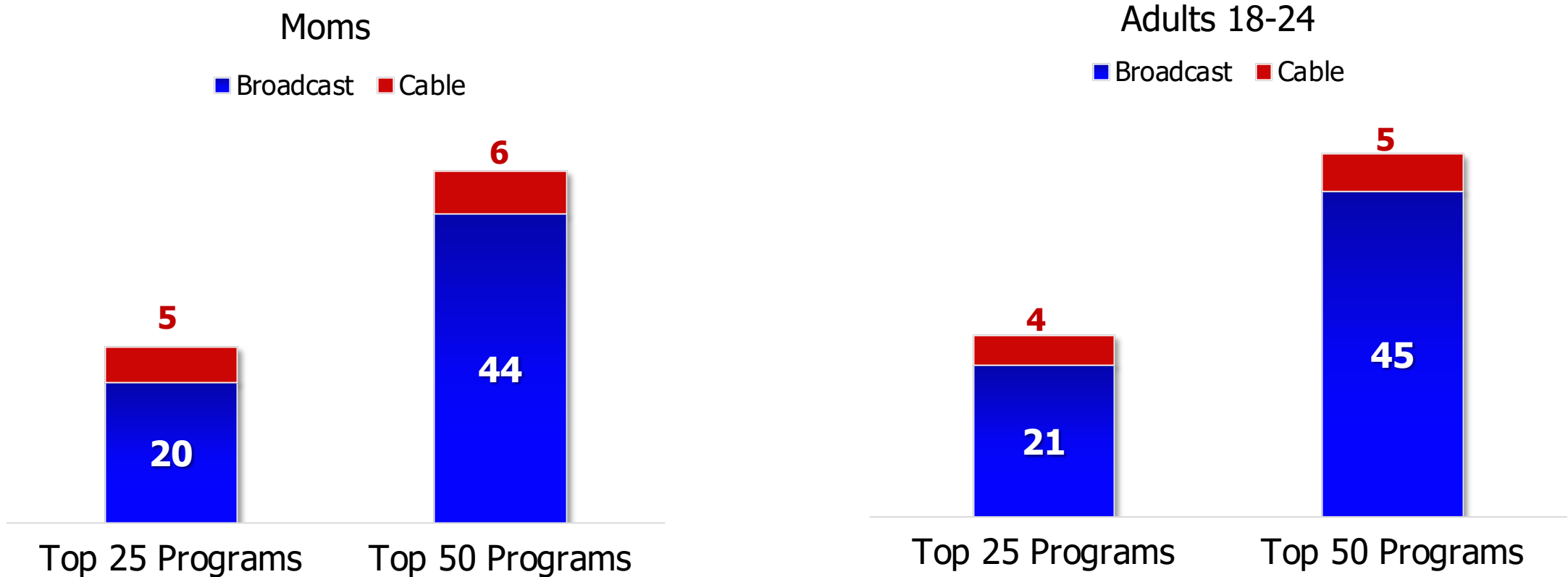


However They're Shopping &
Whatever They're Shopping For,
Broadcast TV Delivers
Larger Audiences More Quickly



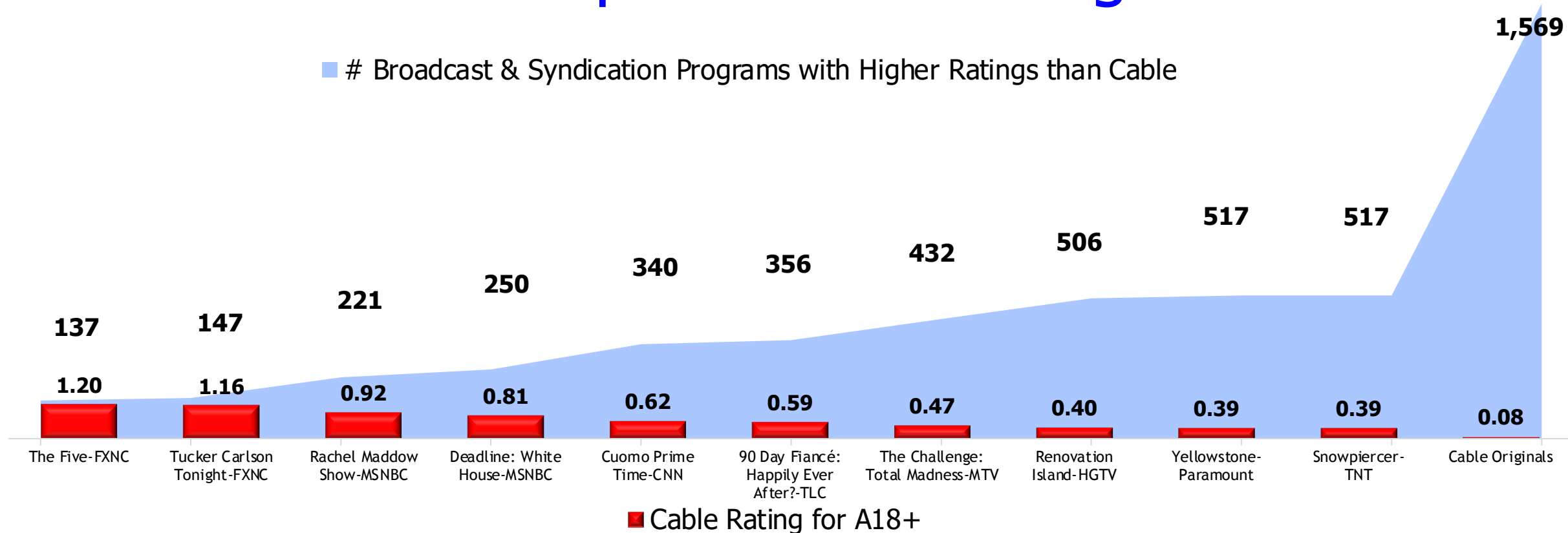
Broadcast TV: Tops in Summer Ratings

Of Top Rated Programs



**Broadcast delivered 44 of the top 50 programs for for Moms
and 45 of the top 50 for A18-24**

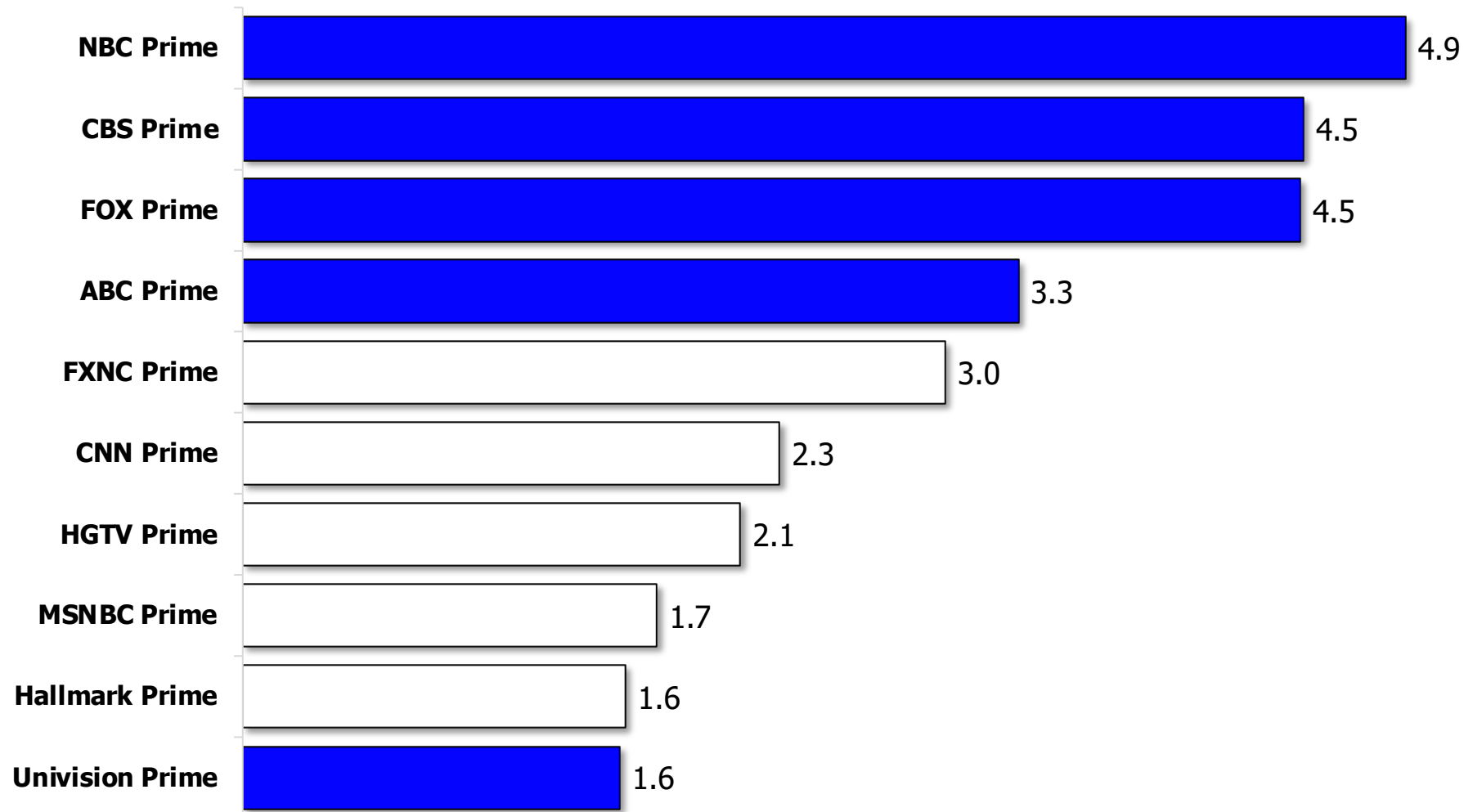
Broadcast Programs During the Summer Far Outstrip Even Cable originals



To be read: Fox News Channel's "The Five" had a 1.20 average A18+ rating in Summer 2020. During the same time period, there were 137 Broadcast & Syndication programs that had higher average ratings

Broadcast TV's Reach: Significantly Higher Than Cable

A18+ One Day Prime Reach

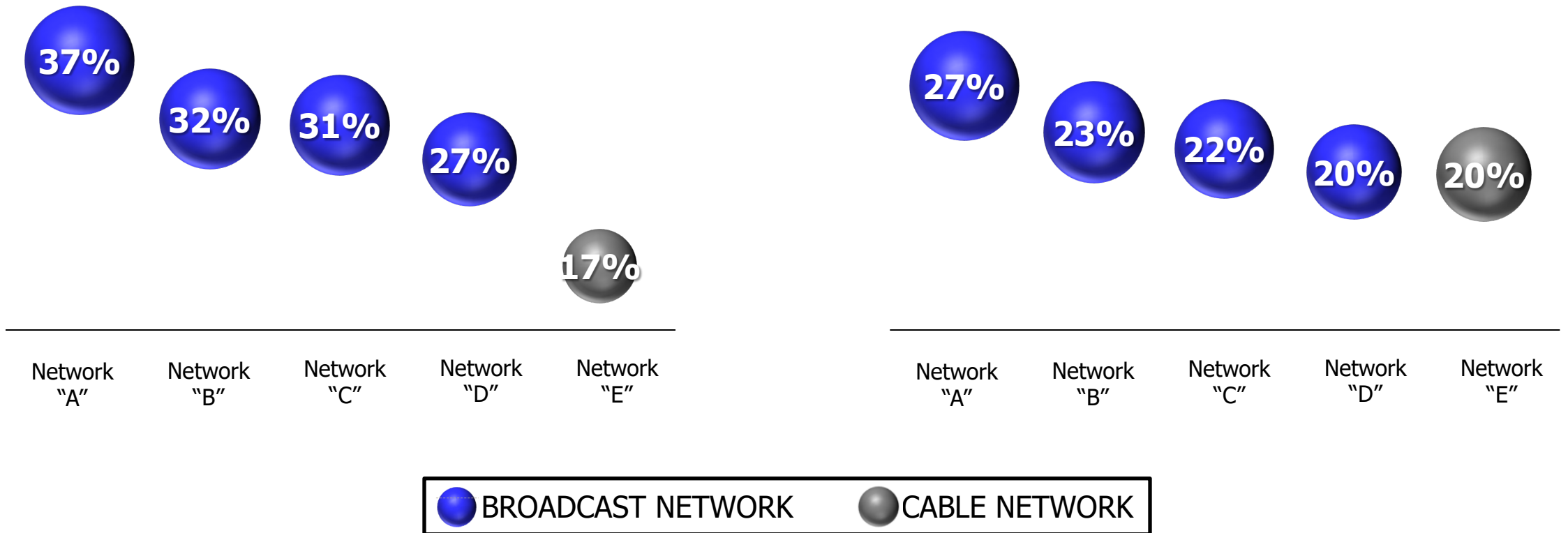


"If you could choose only **five** networks, which five would you choose?"

Out of 5 choices, the top 4 were Broadcast Networks

Moms 18+
% Choose Network

A18-24
% Choose Network



Build Reach Quickly with Broadcast TV

Broadcast TV Reaches the Same Amount of Adults in 1 Day,
as Social Media does in a Month



A18+
59,506,000 Unduplicated Viewers



1						

Time Frame
Days

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29						

75 Programs on 7 Networks
Nielsen 60 second viewer requirement

6.1 Billion Videos
ComScore 3 second viewer requirement

Broadcast Television Reaches the Same Amount of Adults in 6 Days than YouTube Reaches in a Month



7 Networks

1	2	3	4	5	6	

Time Frame
Days



20,451 Channels

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29						

Summary

- The 2020-21 school year still has many uncertainties in light of COVID-19 regarding reopening plans, shopping timelines, purchase trends and more.
- Even with so much left unknown, back-to-class spending is expected to be a record high of \$101.6 billion; with back-to-school spending expected to be \$33.9 billion and back-to-college \$67.7 billion.
- Back-to-class consumers are planning to shop more online – Broadcast TV delivers these key shoppers.
 - Online shoppers spend the most time with TV of all ad supported platforms
 - TV ads influence search selections and are motivation to do further research online. It is the top advertising medium for purchase influence
- Among adults 18+ during this pandemic:
 - Broadcast TV has the highest reach (81%) among the different platforms measured including cable TV, social media, and government websites
 - Respondents claimed Broadcast TV provides the best information & updates on the coronavirus
 - Local broadcast television news was the #1 trusted source, and its websites/apps were the highest trusted digital source

Thank You

