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2015 Back-to-School Survey
Reading, writing, and retail

Conducted July 5-8, 2015
1,015 responses

About the survey

The survey was commissioned by Deloitte and conducted online by an independent research company between July 5 and 8, 2015. The survey polled a sample of 1,015 parents of school-aged children and has a margin of error for the entire sample of plus or minus three percentage points.

All respondents had at least one child attending school in grades K – 12 this fall.

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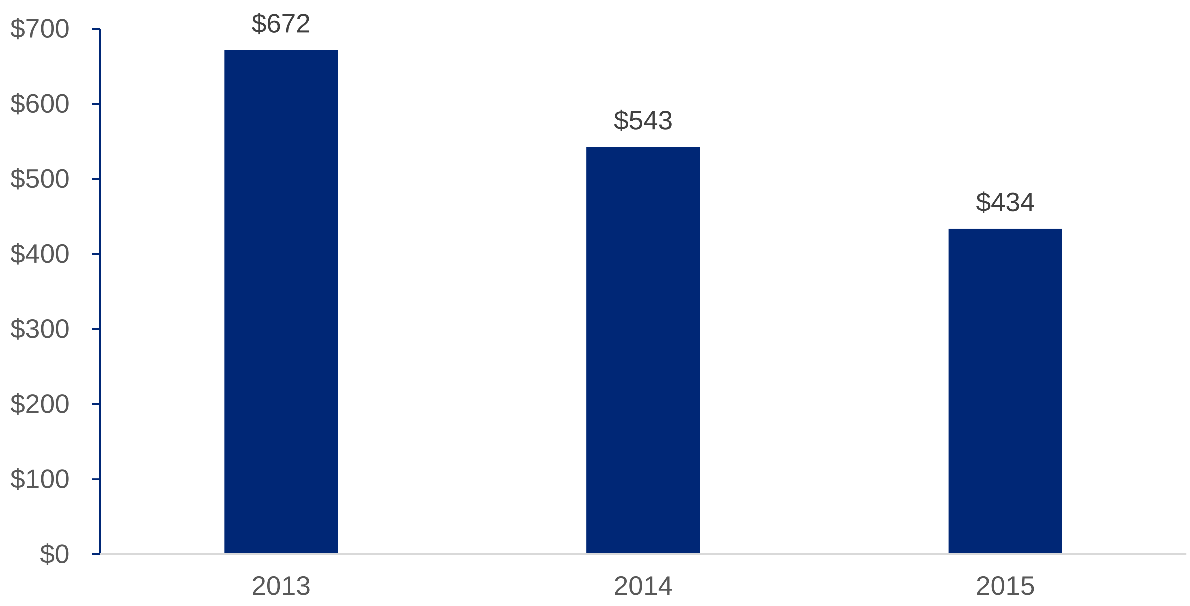
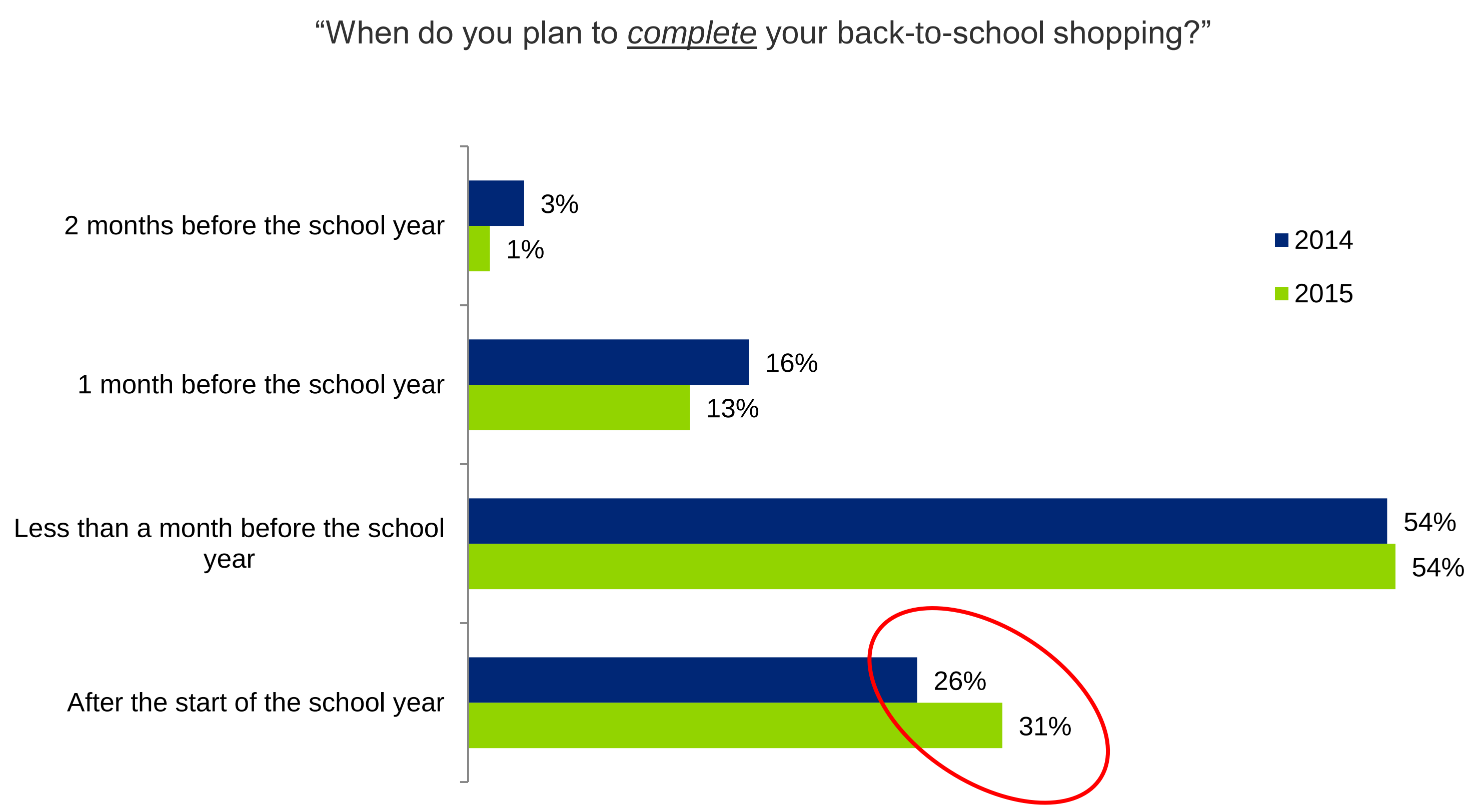
Total household spending (including children) this back-to-school season

"What is the total amount **you [parent] and your children** expect to spend on back-to-school items this season?"



- Only **11%** of parents intend to make cash purchases – down from a high of 26% in 2010

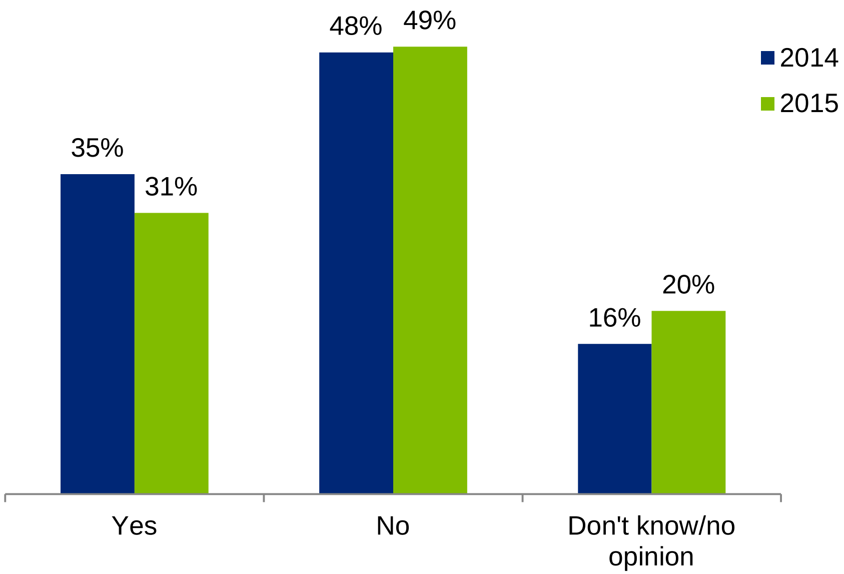
31% of respondents will *complete* their back-to-school shopping after the school year starts



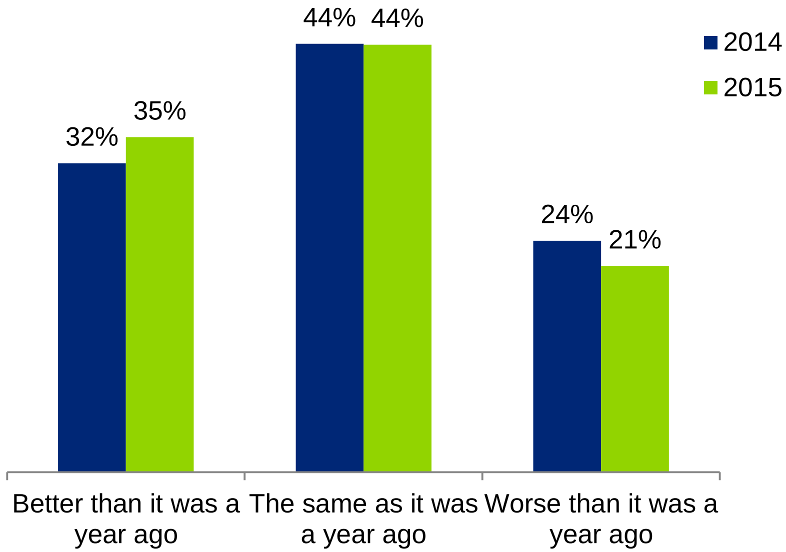
Consumer sentiment toward economy is unchanged

79% of respondents say their financial situation is “better” or the “same” today

“Are you more confident about the U.S. economy’s prospects now (July 2015), than you were at the end of 2014?”

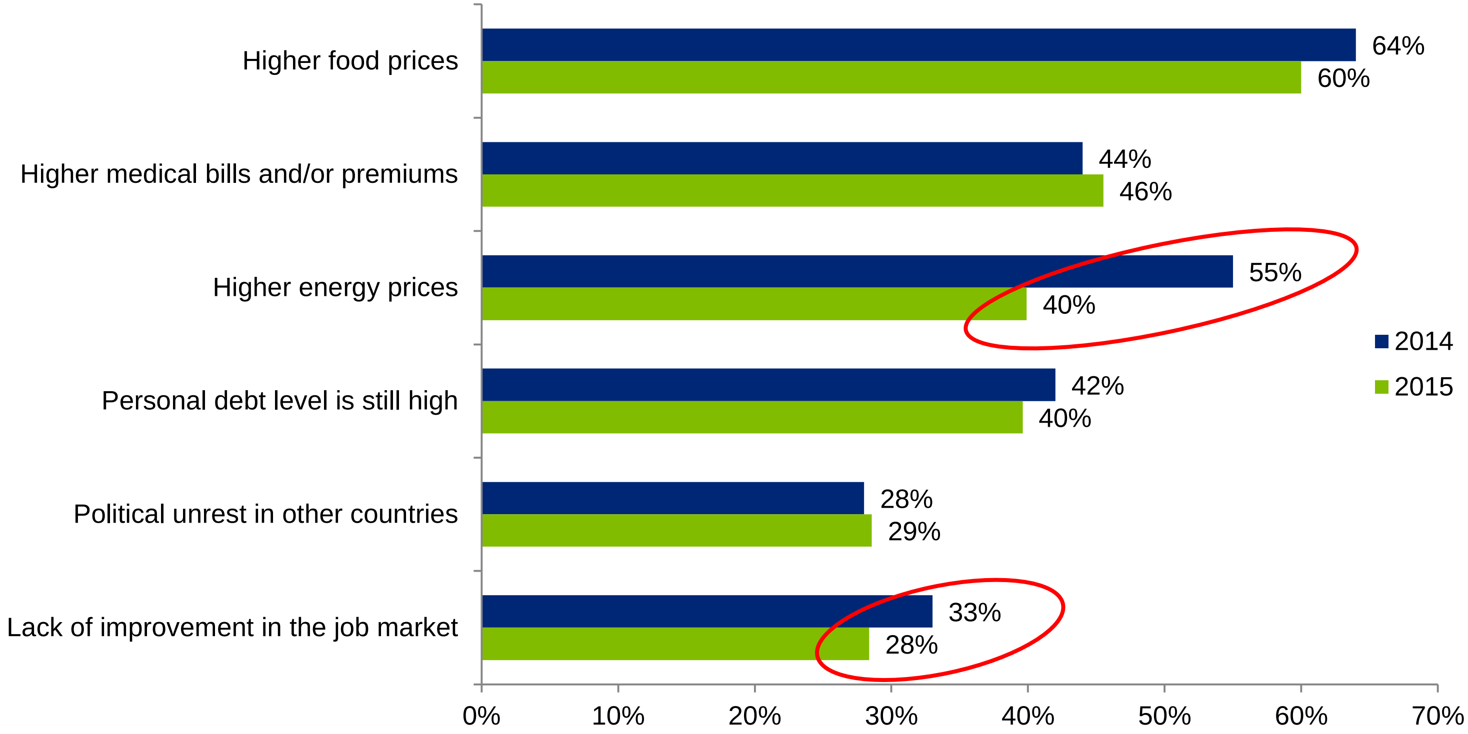


“Thinking about your household's assets (home, cash, car, etc.) and your liabilities (credit card bills, mortgage, etc.), is your household's financial situation today …”



Top 5 concerns respondents have about the U.S. economy or their household's finances that could impact their back-to-school shopping

"Which of the following concerns do you have about the U.S. economy or your household's finances that could hold back your back-to-school spending?"

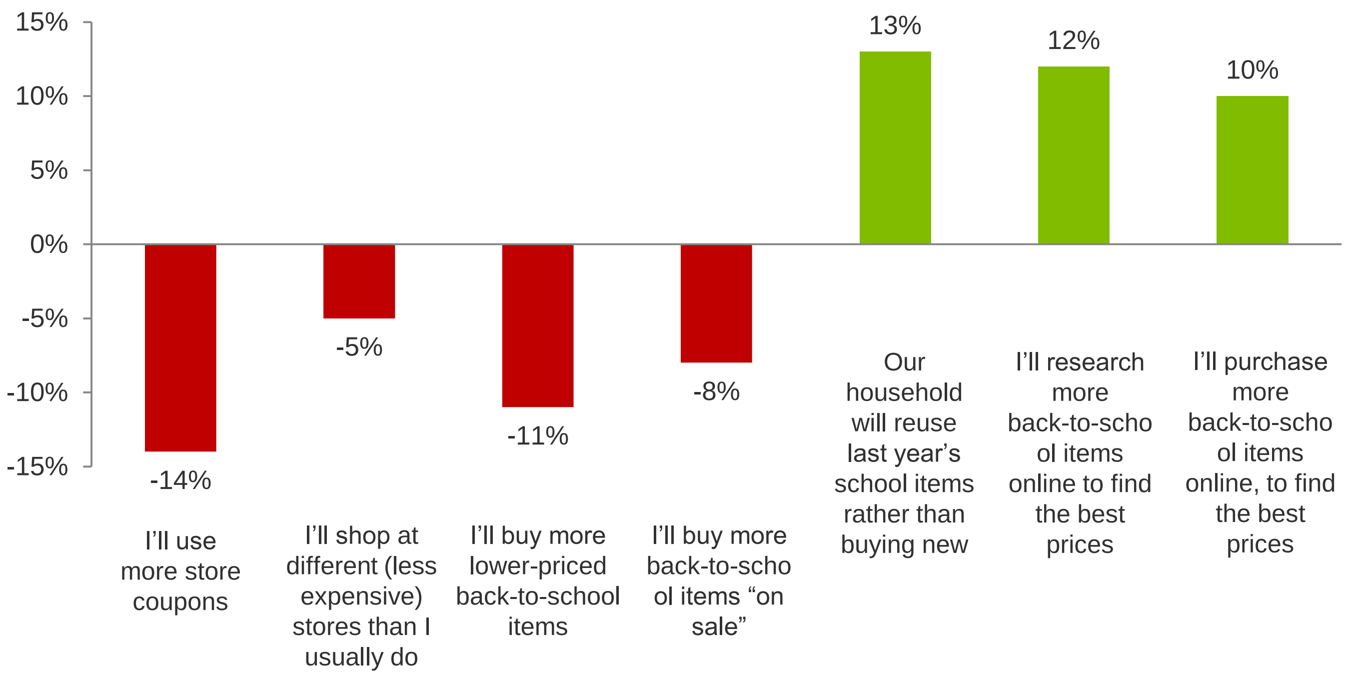


Respondents are modifying their back-to-school shopping behaviors

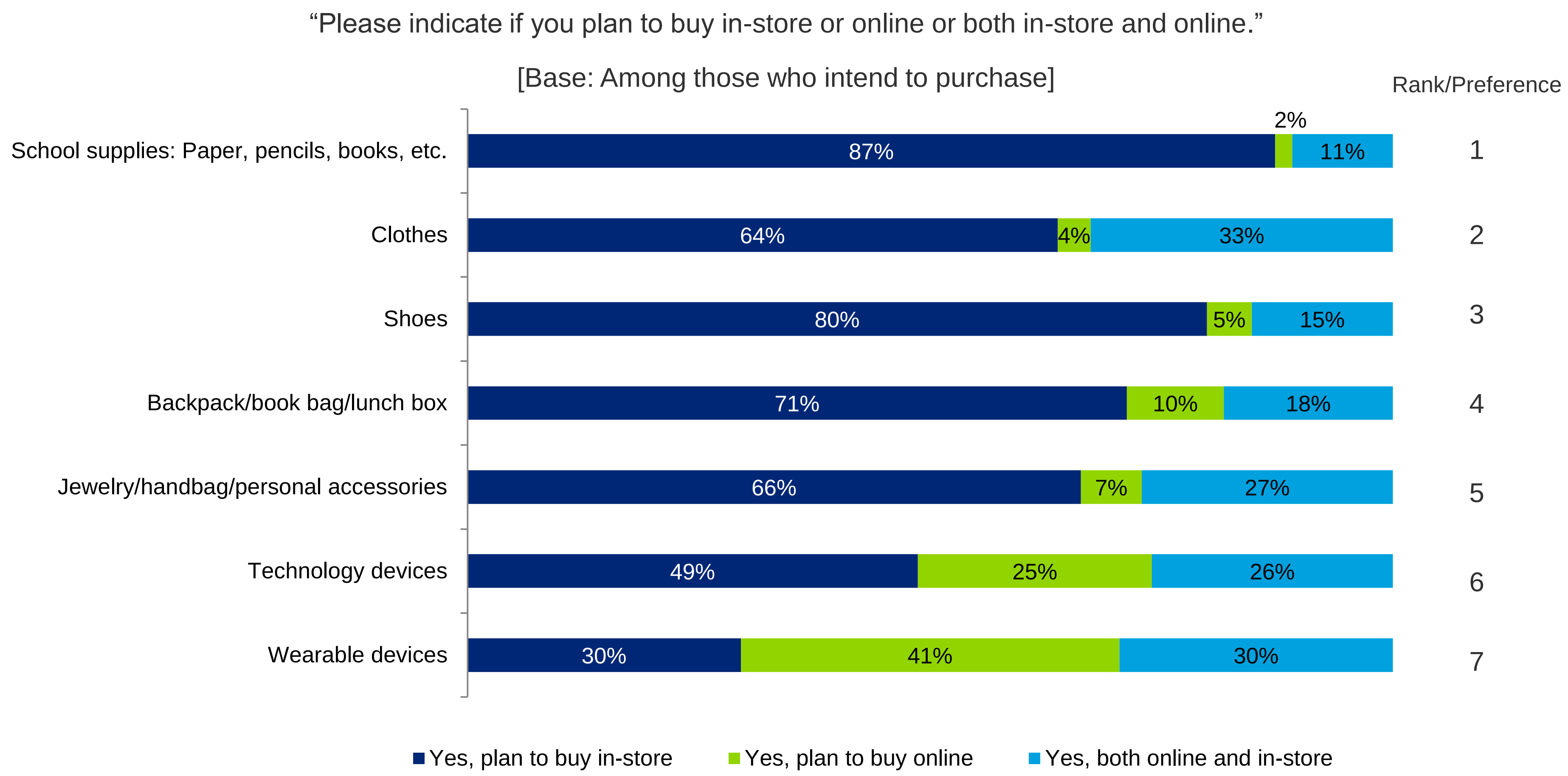
"How are you likely to change the way you shop for back-to-school items this season because of your concerns about the U.S. economy or your household's finances?"

(Percentage point change over the five-year period from 2011-present)

(Among total)



Among the top school items respondents plan to purchase, the brick-and-mortar store ranks higher than online as the channel where they intend to buy

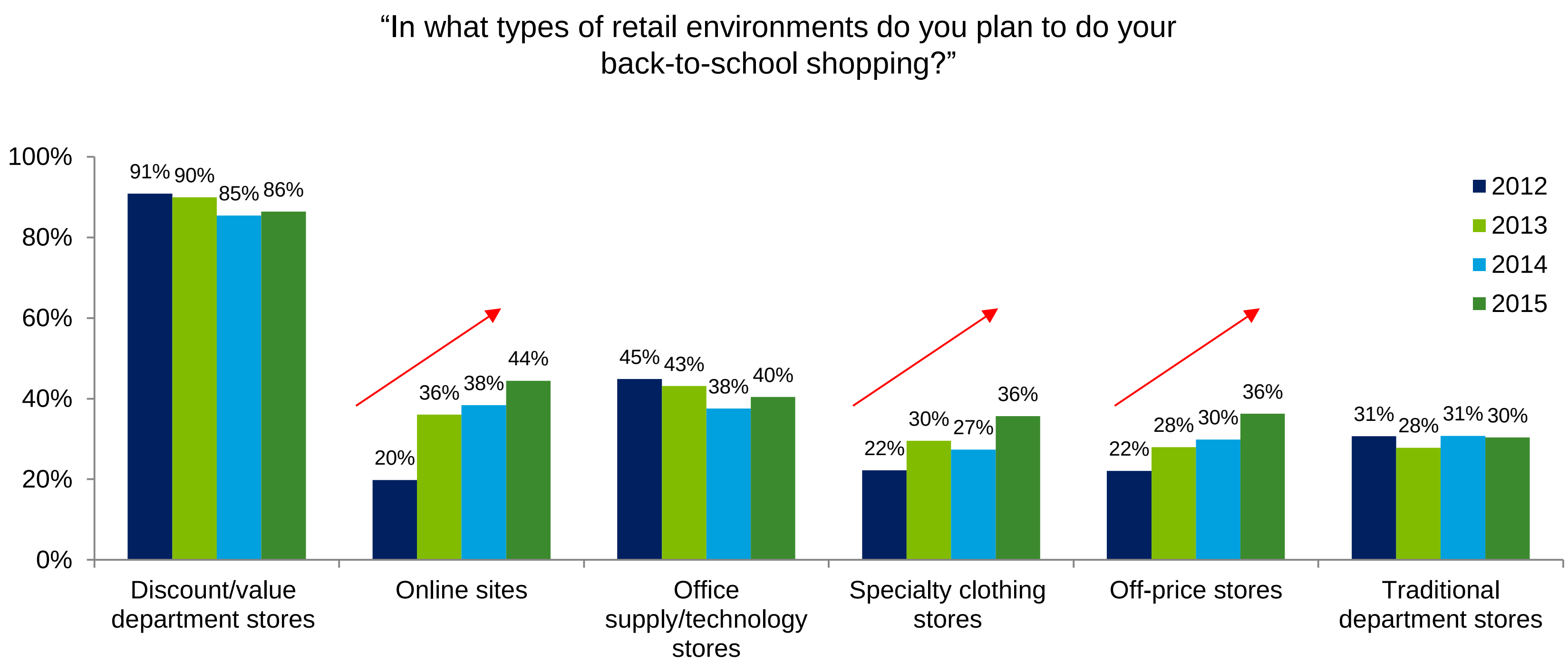


Sorted in order of rank/preference

"Technology devices" category includes the average of: computer software/small accessories; notebook or tablet; cell phone/smart phone; computer - desktop/laptop; printer or other computer hardware; and other personal technology product

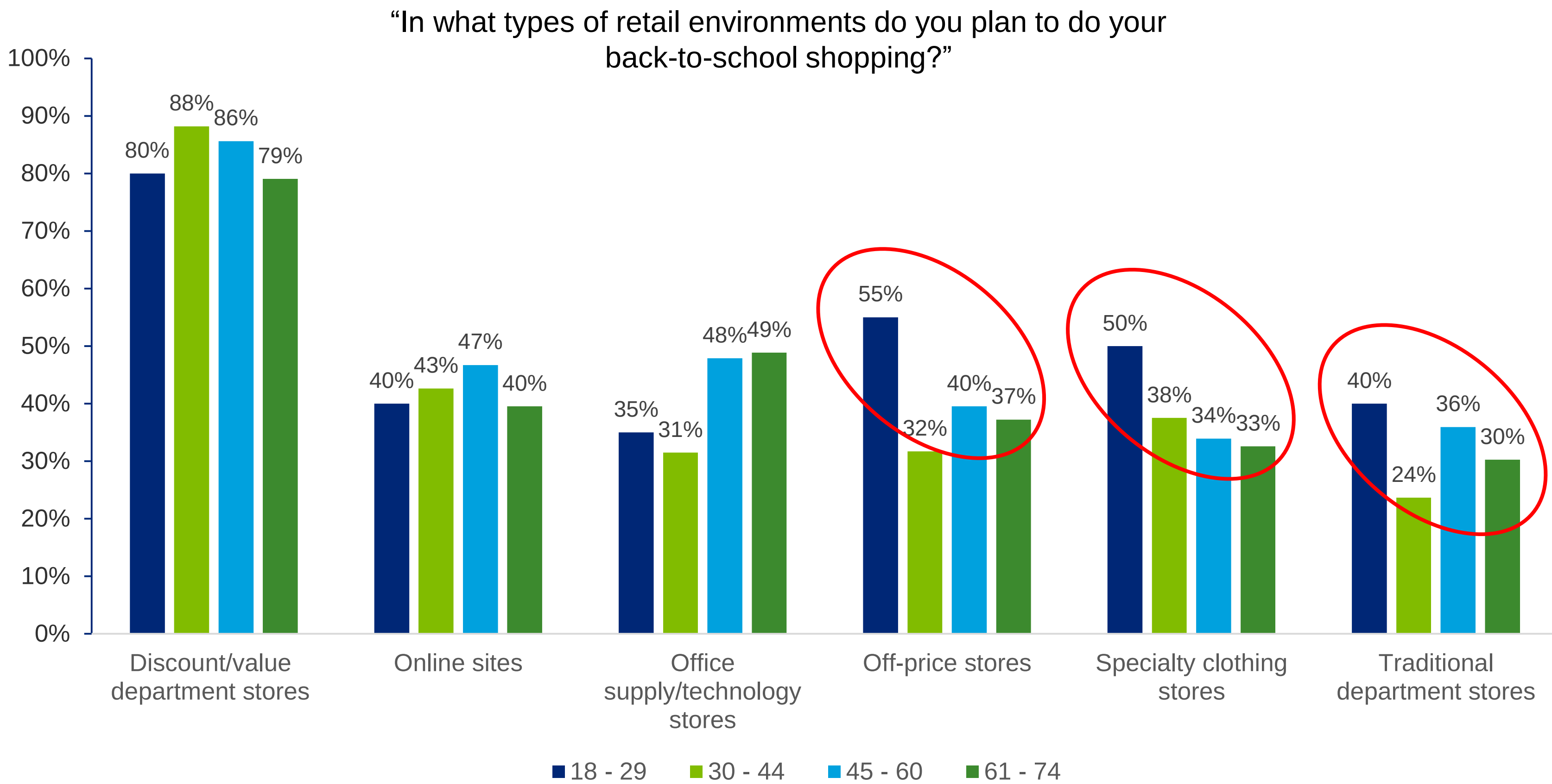
Top 5 shopping destinations this school season

“Online” takes sole possession of second place for first time in survey history



Retail environments to be shopped by age cohort

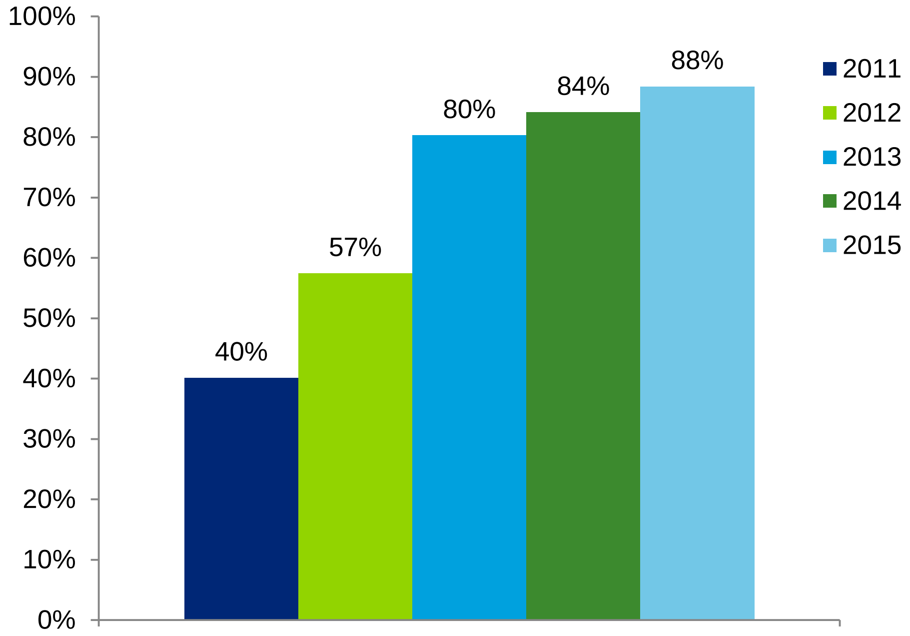
Younger generations (18-29 year olds) are planning to shop “specialty clothing,” “off-price,” and “traditional department stores” more frequency than other age groups this back-to-school season



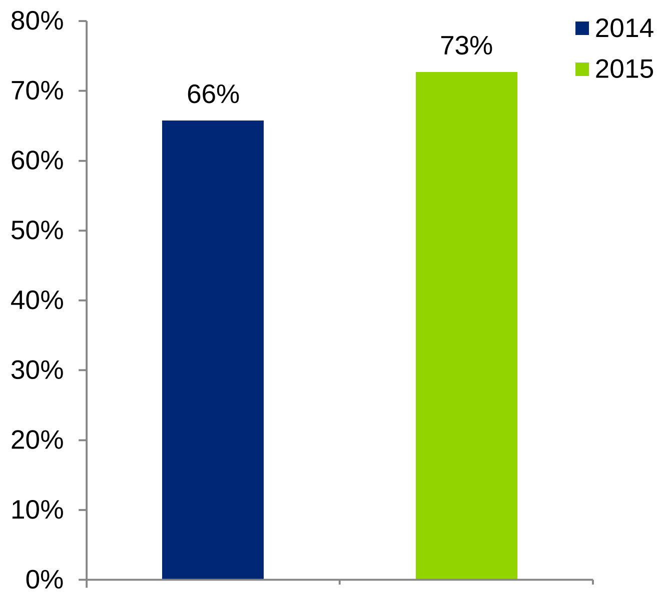
Smart phone and tablet ownership is rising

Exponential growth in technology is creating an "always connected" consumer in a 24/7 shopping environment

"Do you own a **smart phone**?"



"Do you own a **tablet**?"

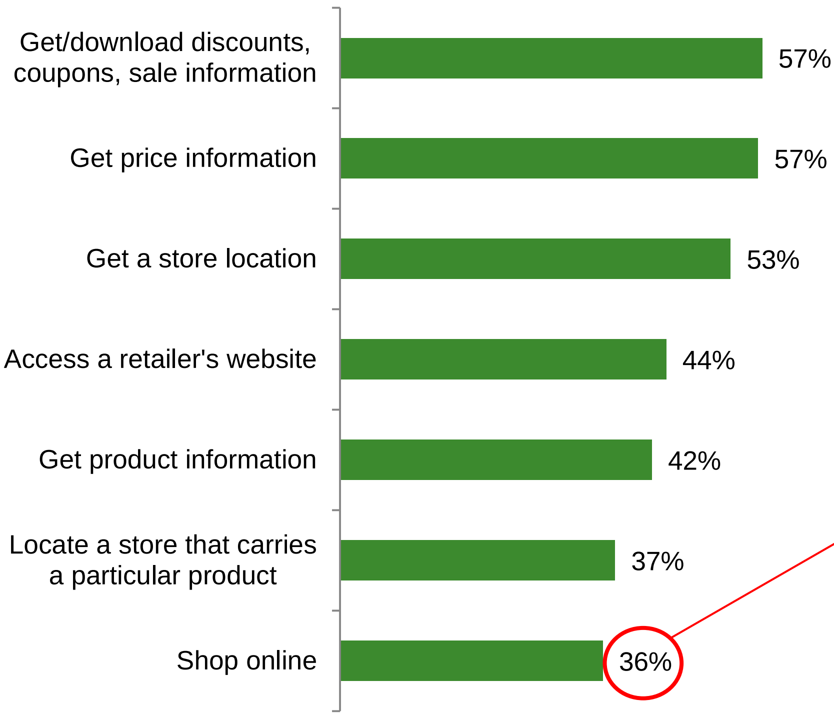


Among survey respondents, two in 10 (**20%**) own wearable devices

Smart phone and tablet owners will use their devices in multiple and varied ways to engage with retailers

"With regard to your back-to-school shopping, for what purposes would you likely use a **smart phone**?"

[Base: Among **80%** of smart phone owners who plan to use them for back-to-school shopping] +6 vs. 2014



Answer choices below 36% not represented for 2015

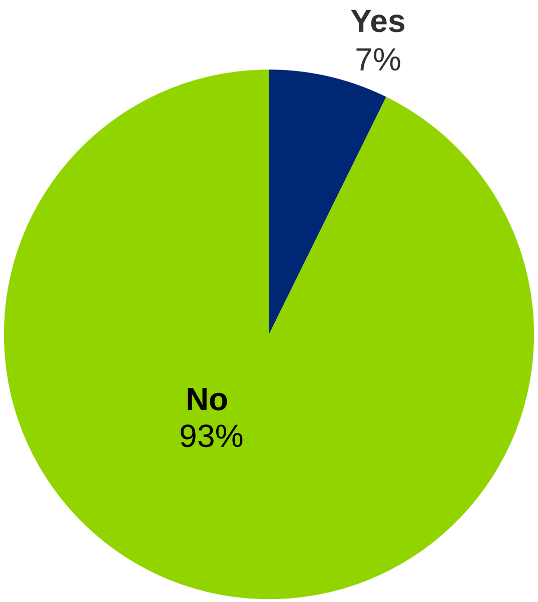
"With regard to your back-to-school shopping, for what purposes would you likely use a **tablet**?"

[Base: Among **53%** of tablet owners who plan to use them for back-to-school shopping]

Answer choices below 46% not represented for 2015

Mobile payment and in-store beacons are still an emerging technology and expect to be used by a small percentage of respondents this back-to-school season

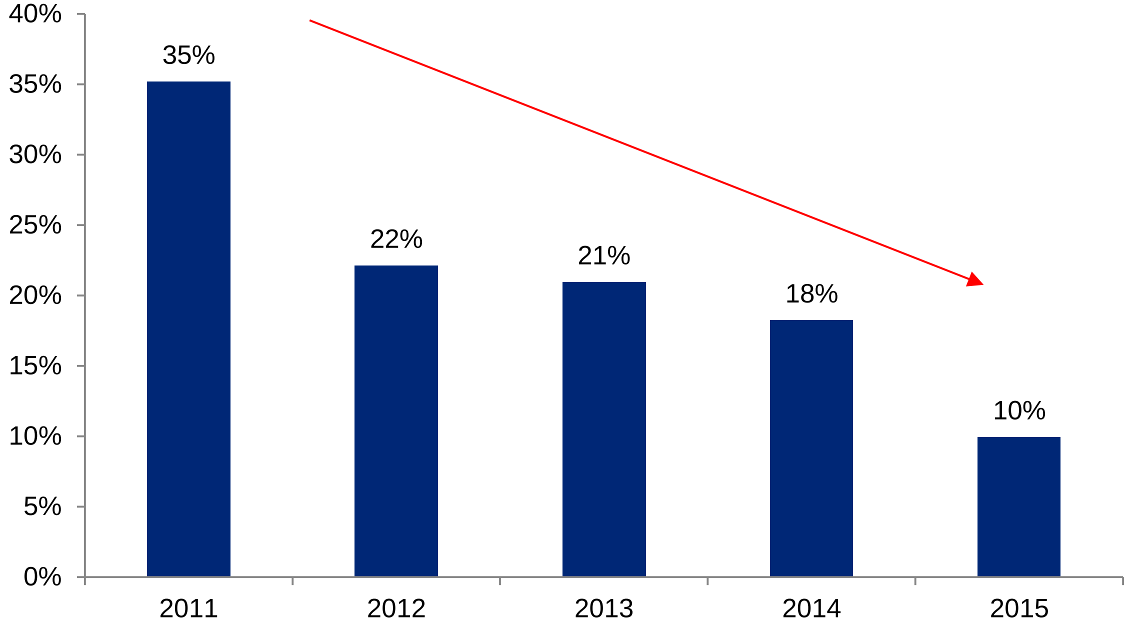
"Do you plan to use a mobile payment or digital wallet service to complete a purchase this back-to-school season?"



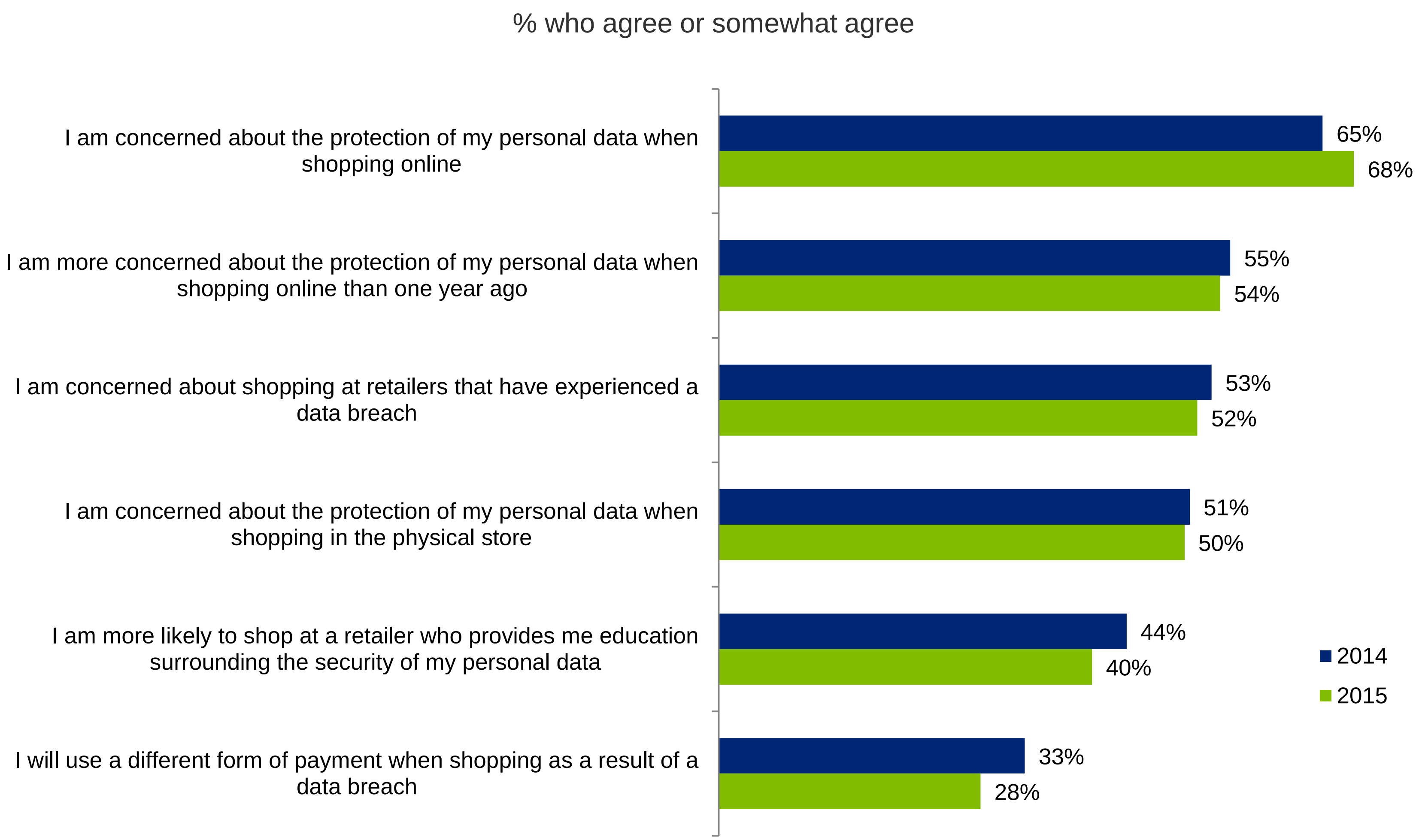
16% of respondents will engage with in-store beacon technology this back-to-school season

Social media is of declining importance to back-to-school shoppers

“Do you plan to use social media sites to assist in your back-to-school shopping?”



Respondents are concerned about the protection of their personal data



Trends impacting school buying: From school lists to free shipping, and “buy online, pick up in store”

% who agree or somewhat agree

69%	My back-to-school shopping is influenced more by the school’s recommended product list than my children’s requests
66%	I am more likely to purchase from online retailers who offer free shipping during the back-to-school shopping season
38%	The back-to-school shopping season is less important to my family because we replenish school supplies throughout the year and feel less need to stock up
32%	I’m buying fewer traditional school supplies (i.e., pencils, crayons, notebooks) because my children are using more digital technologies like tablets/computers in and out of the classroom
17%	I will shop physical stores less this back-to-school season because the option to “buy online, pick up in store” is more convenient

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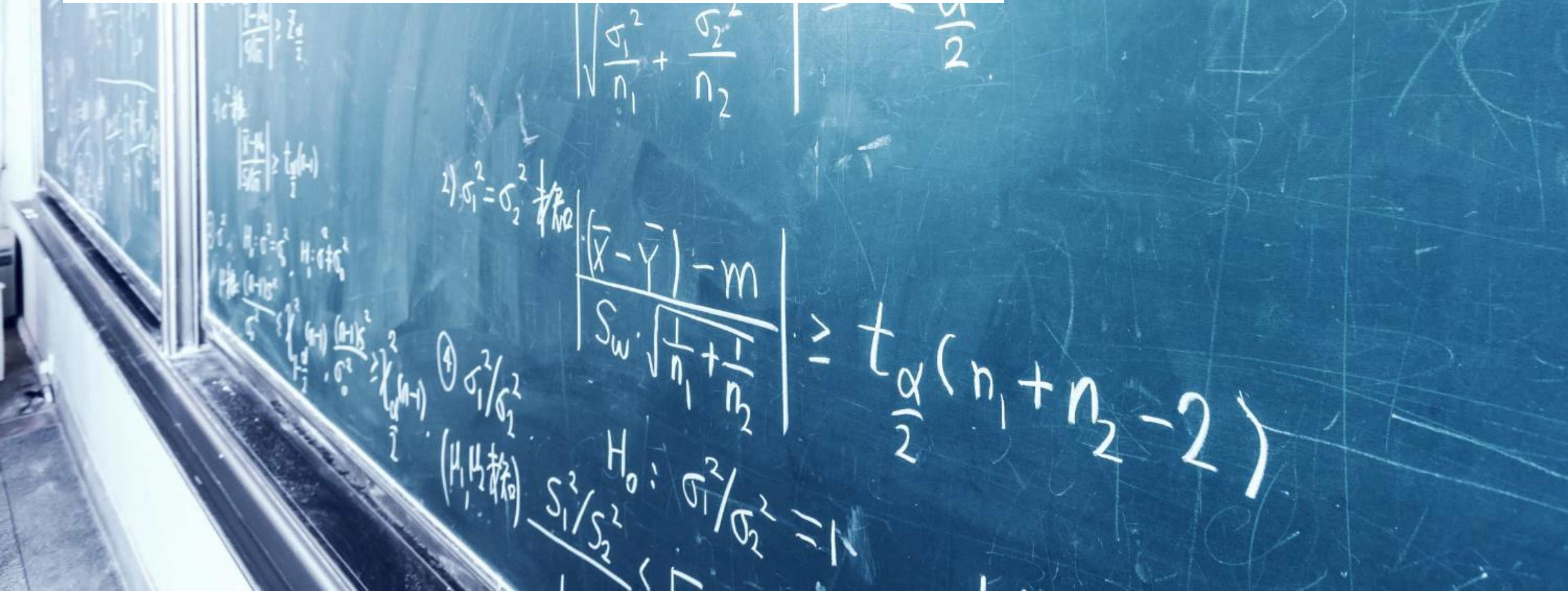
2015 Back-to-College Survey
Reading, writing, and retail

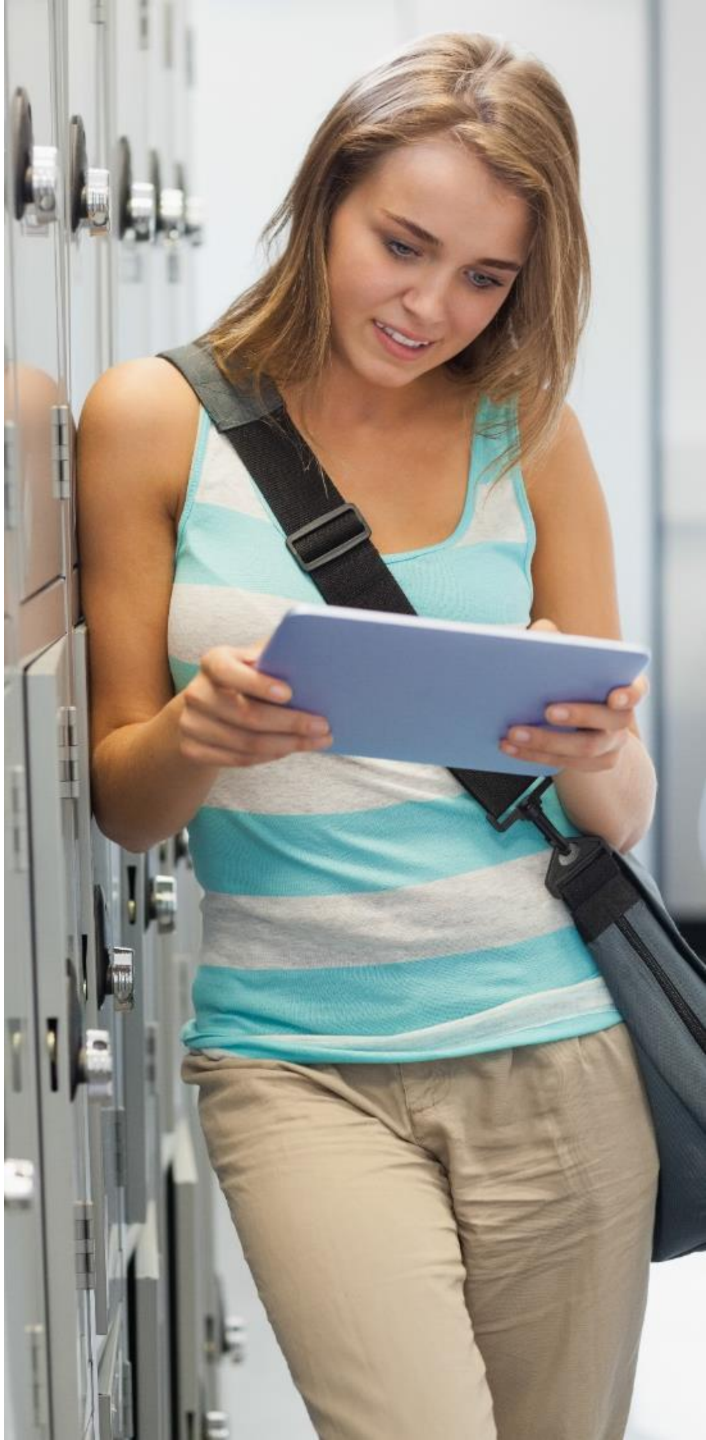
Conducted July 5-13, 2015
450 responses



About the survey

The survey was commissioned by Deloitte and conducted online by an independent research company between July 5 and 13, 2015. The survey polled a sample of 450 parents of college children and has a margin of error for the entire sample of plus or minus five percentage points.

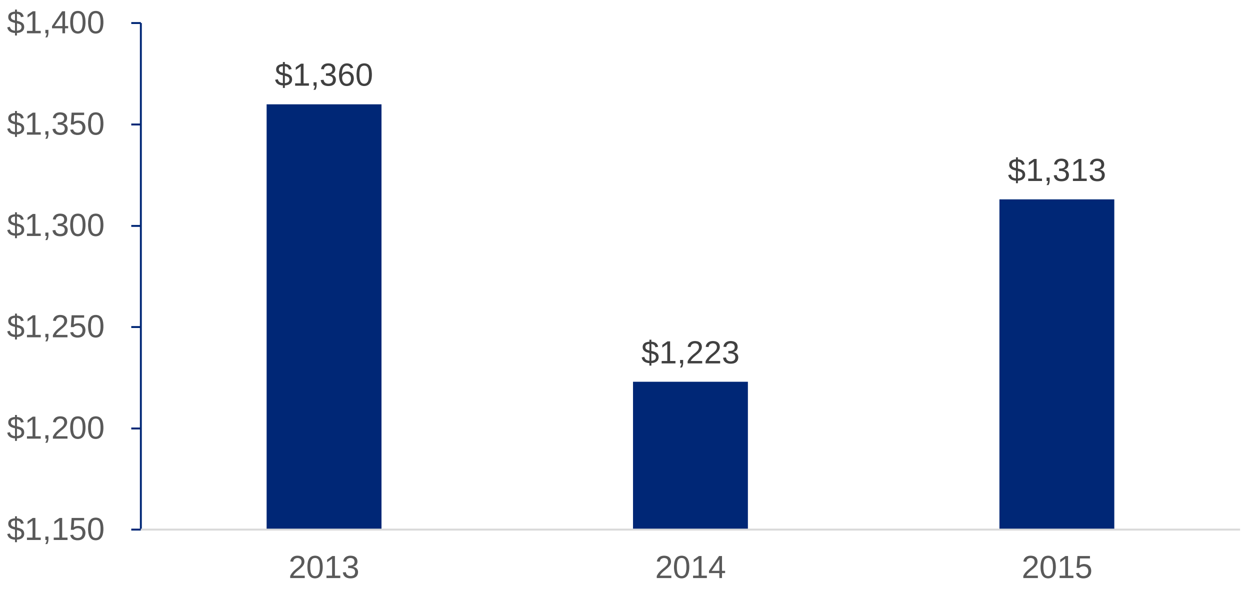
All respondents had at least one child attending college this fall.



College families' average combined spending

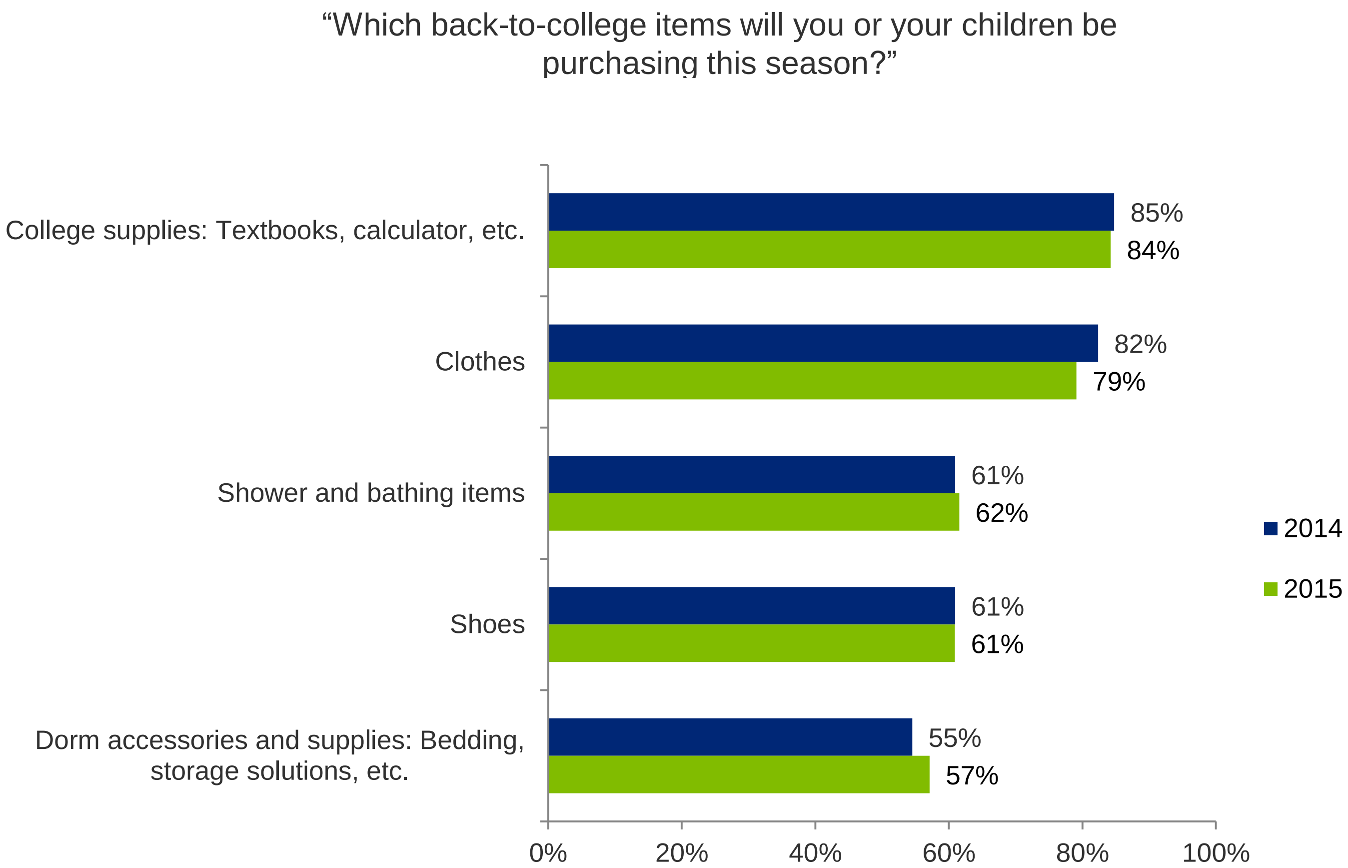
Families (including children) will spend on average $1,313 this back-to-college season – an increase of $90 from 2014

"What is the total amount **you [parent] and your children** expect to spend on back-to-college items this season?"



Top 5 college items most in demand

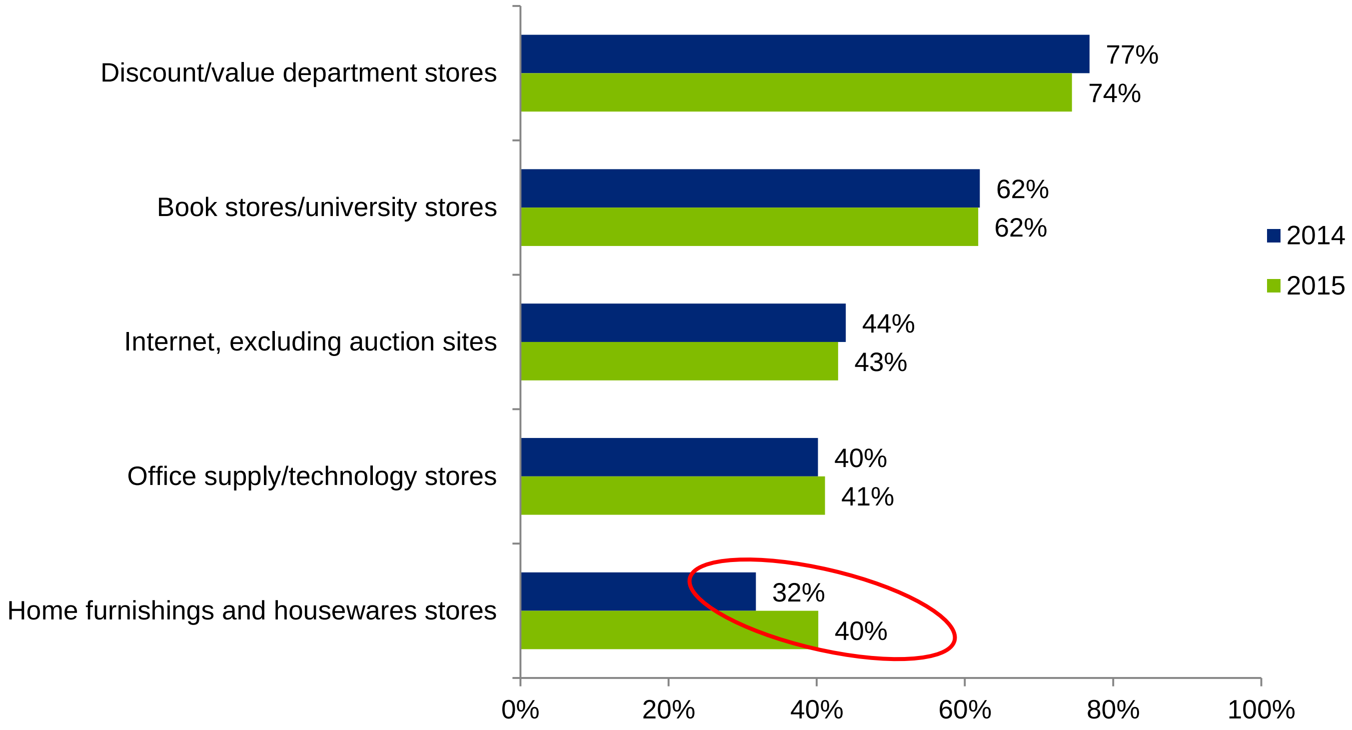
College supplies, clothes and shower and bathing items rank 1-2-3, respectively



Items below 57% not presented in this chart for 2015

Top 5 retail environments where consumers plan to do their back-to-college shopping

"In what type(s) of retail environment(s) do you plan to do your back-to-college shopping?"

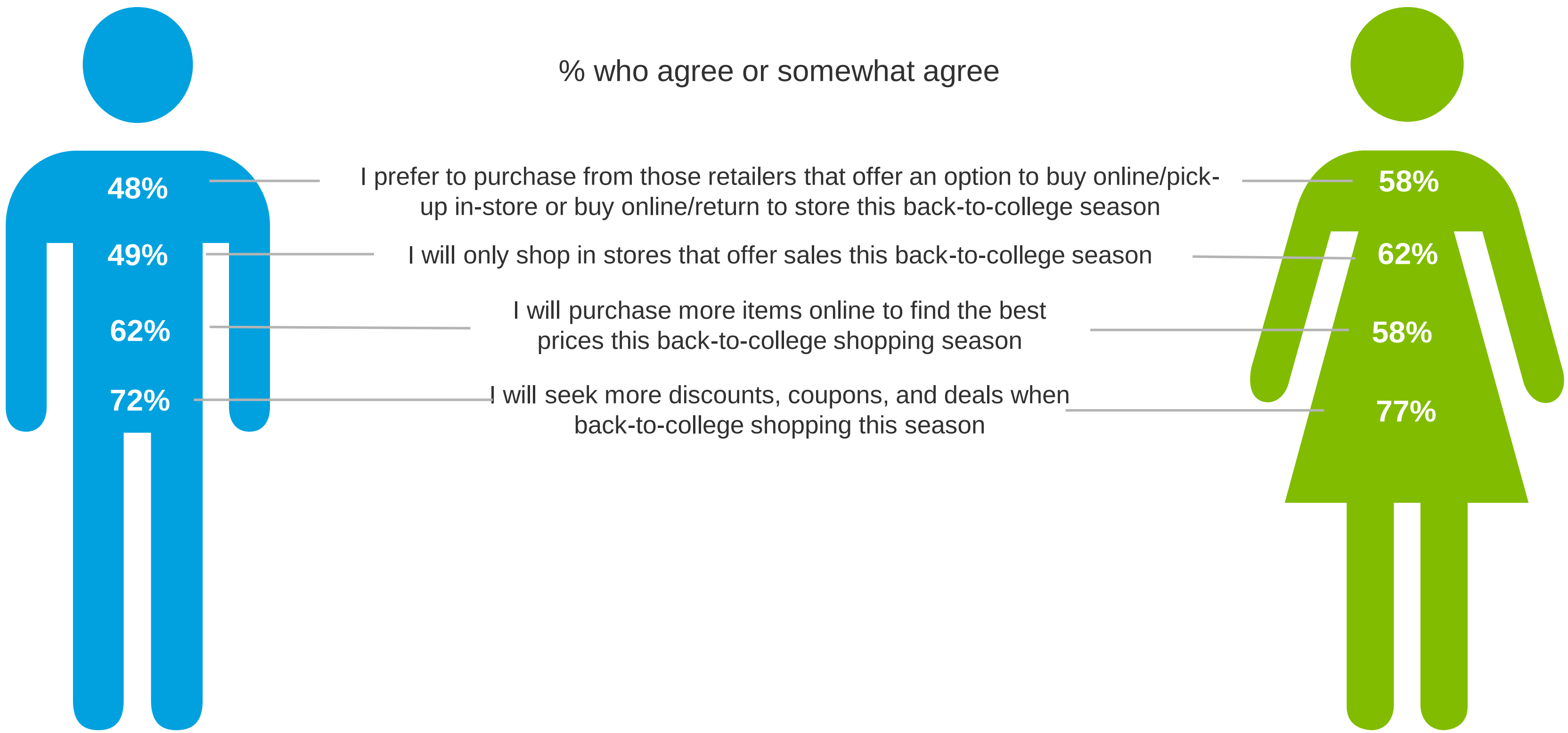


Respondents expect to take on average **5 shopping trips** when purchasing back-to-college items

Retail environment below 40% not presented in this chart for 2015

Gender differences in college buying behaviors

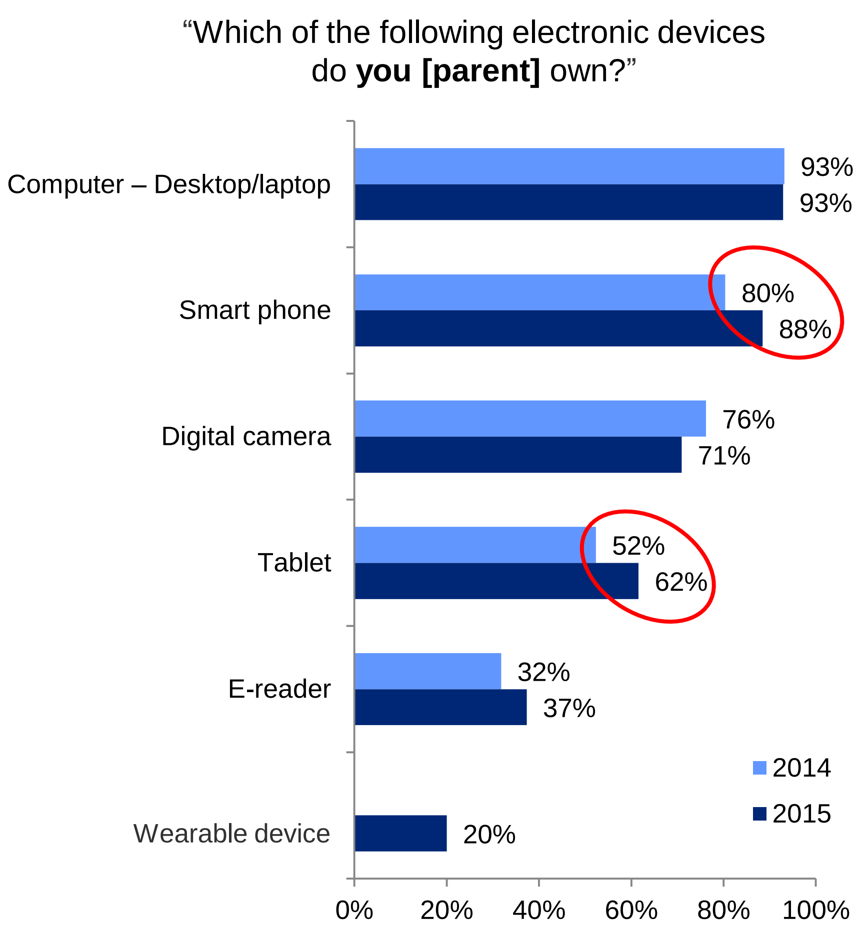
Female respondents plan to be more price/budget conscious, prefer more flexible shopping options; male respondents will purchase more online to find best prices

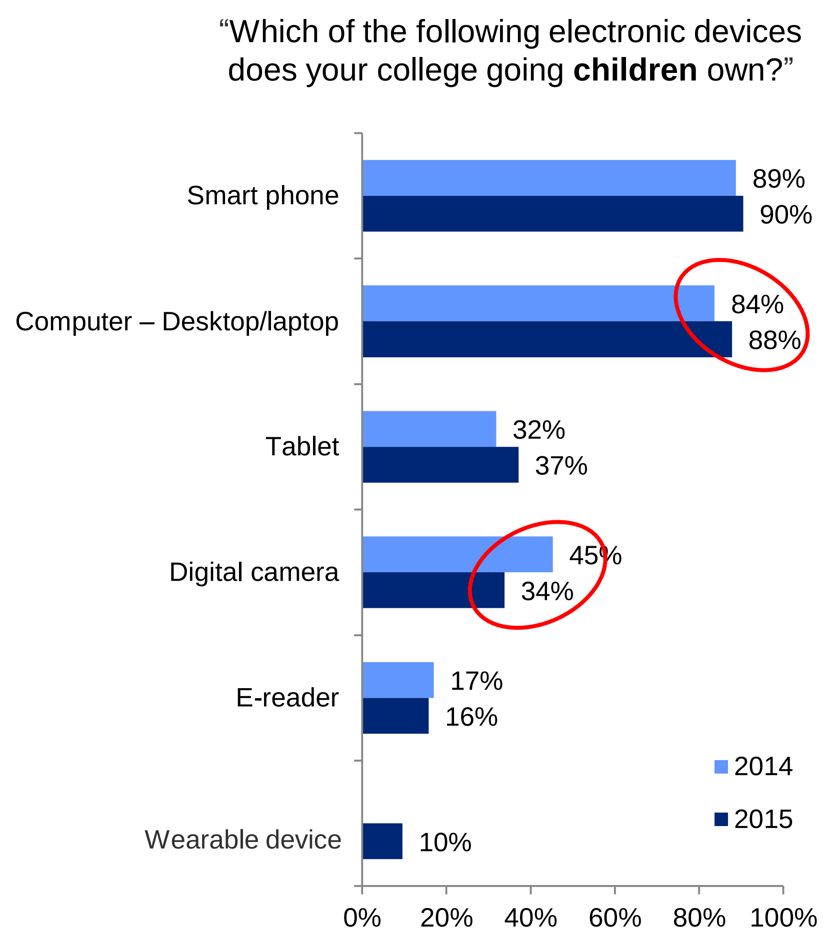


86% of college students will likely buy more used textbooks or textbook rentals to help stretch their back-to-college spending budget

Electronic devices owned by parent and children

"Smart phone" and "tablet" users have increased in parent group, however, "digital camera" users have decreased in children category

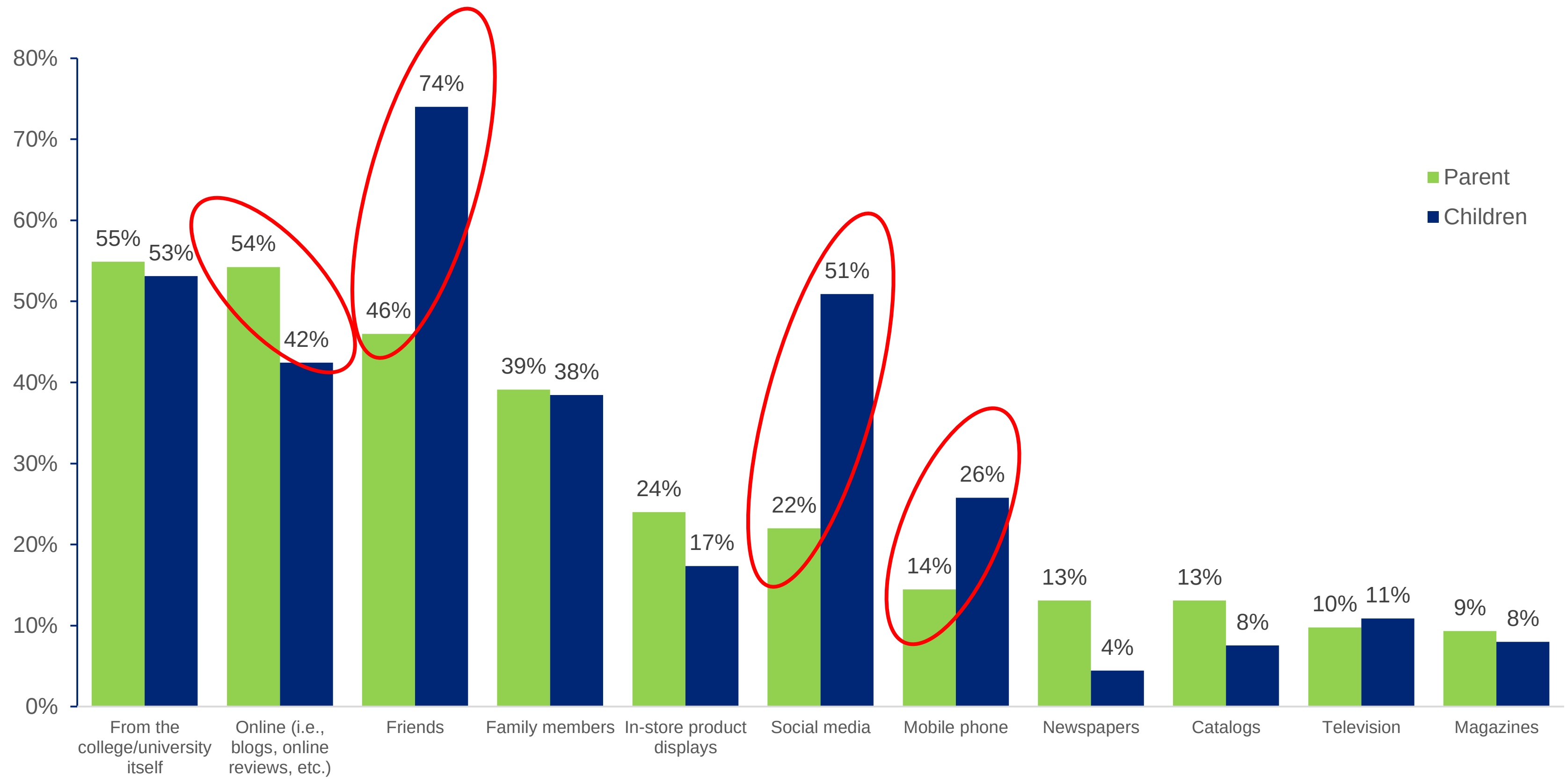




Wearable device data not available for 2014

Sources of college shopping advice for parents and children this back-to-college season

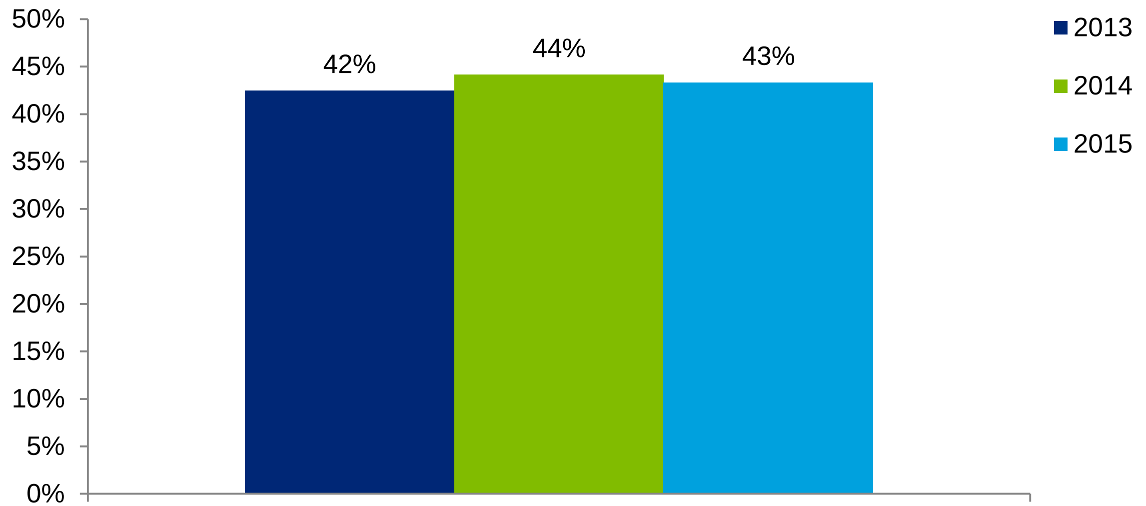
"In general, where are you [parent] and your children most likely to get back-to-college shopping advice?"



Sorted in order of parents; options below 9% for parents not presented

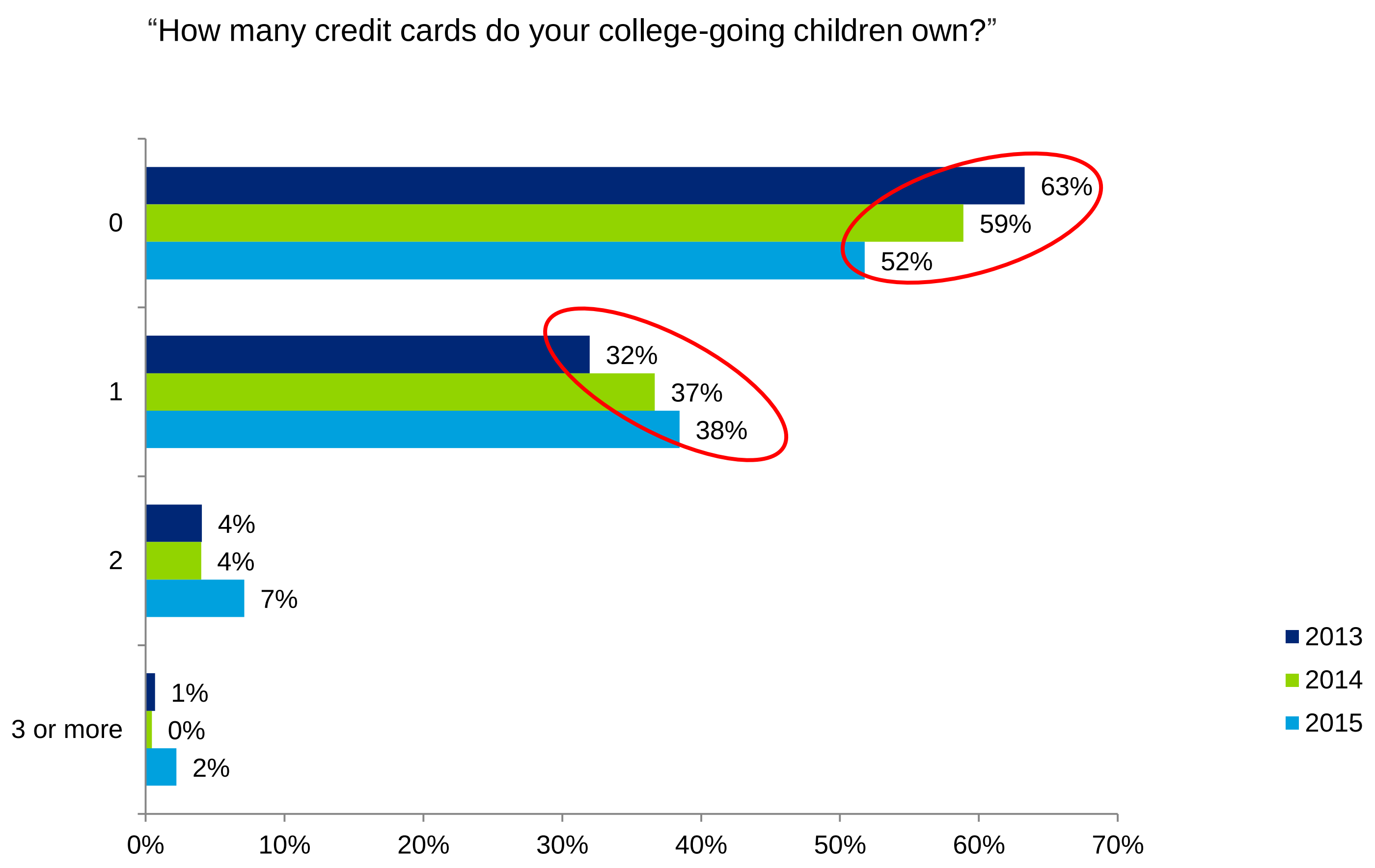
2 in 5 (43%) families plan to use social media sites in their back-to-college shopping

“Do you or your children plan to use social media sites to assist in your back-to-college shopping?”



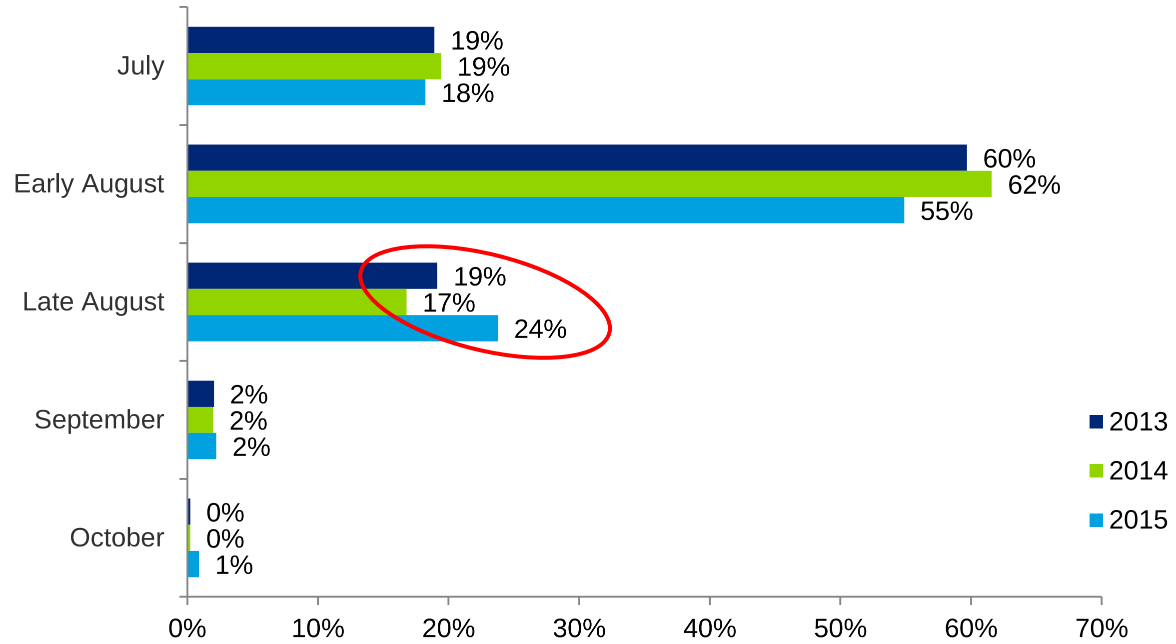
Trend for the use of social media remains the same compared to last two years

Almost half (47%) of respondents indicated that their college-going child owns at least one credit card



Shopping time has shifted to "late August" in small proportion as compared with last two years

"When are you likely to do the majority of your back-to-college shopping?"



51% of parents will complete their college shopping less than a month before the college year starts www.deloitte.com/us/2015Back2School

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