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2014 Back-to-School Survey

Rising to the head of the class

Conducted July 5-10, 2014
1,063 responses

About the survey

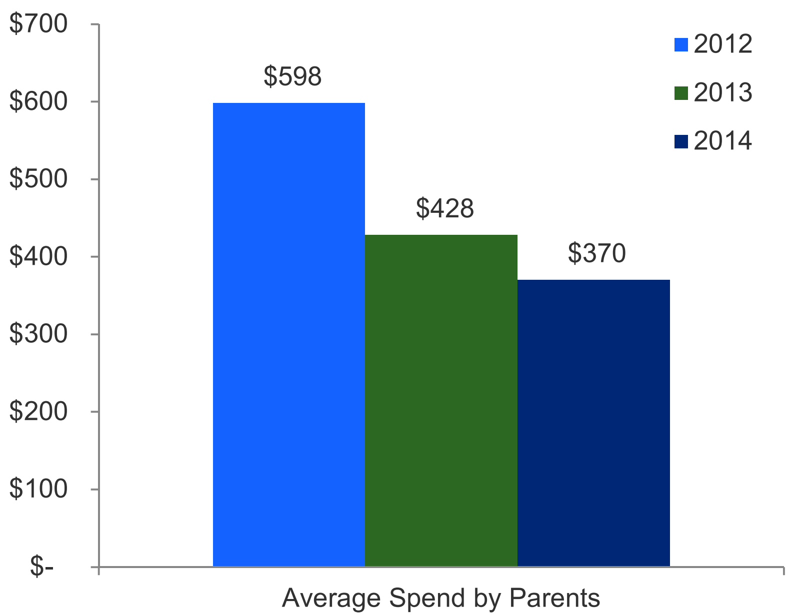
The survey was commissioned by Deloitte and conducted online by an independent research company between July 5 and 10, 2014. The survey polled a sample of 1,063 parents of school-aged children and has a margin of error for the entire sample of plus or minus three percentage points.

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

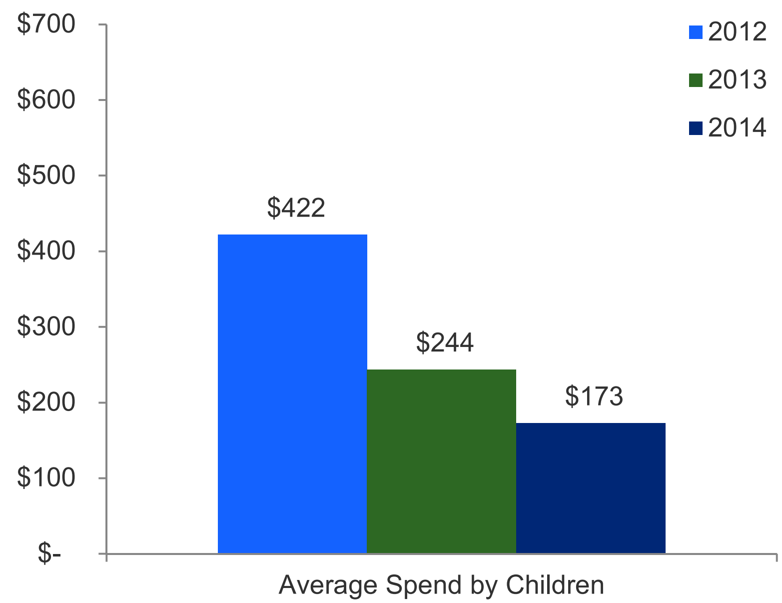
Expected spending by parents, children is declining

Average spending on back-to-school shopping has dropped since 2012

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



"What is the estimated total amount you expect your children will spend on back-to-school items for grades K - 12 this season?"

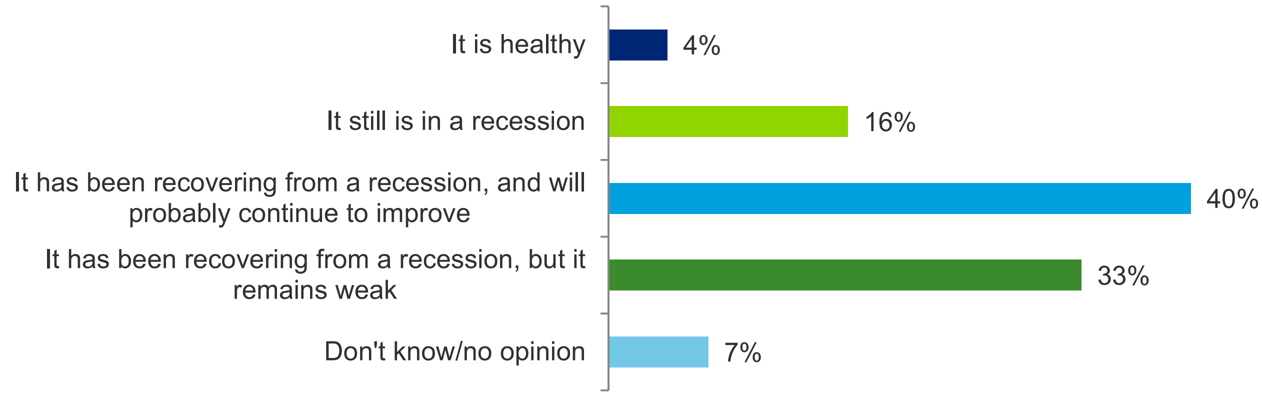


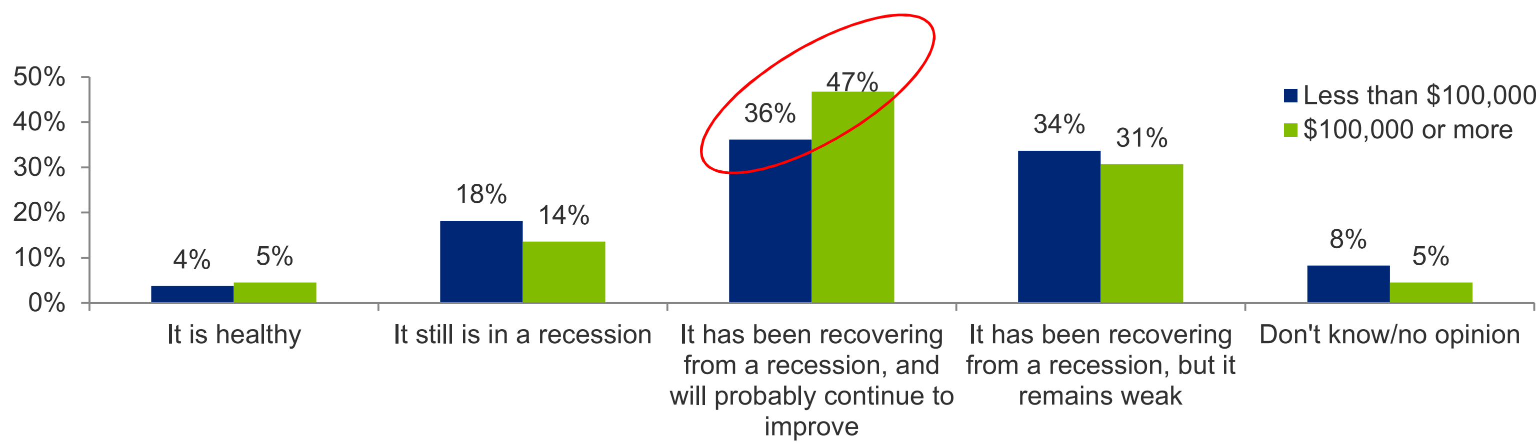
Families (including children) will spend on average $543 this back-to-school season

Consumer sentiment toward economy is optimistic

2 in 5 respondents (40%) believe the economy will continue to improve and sentiment is even stronger among higher income groups

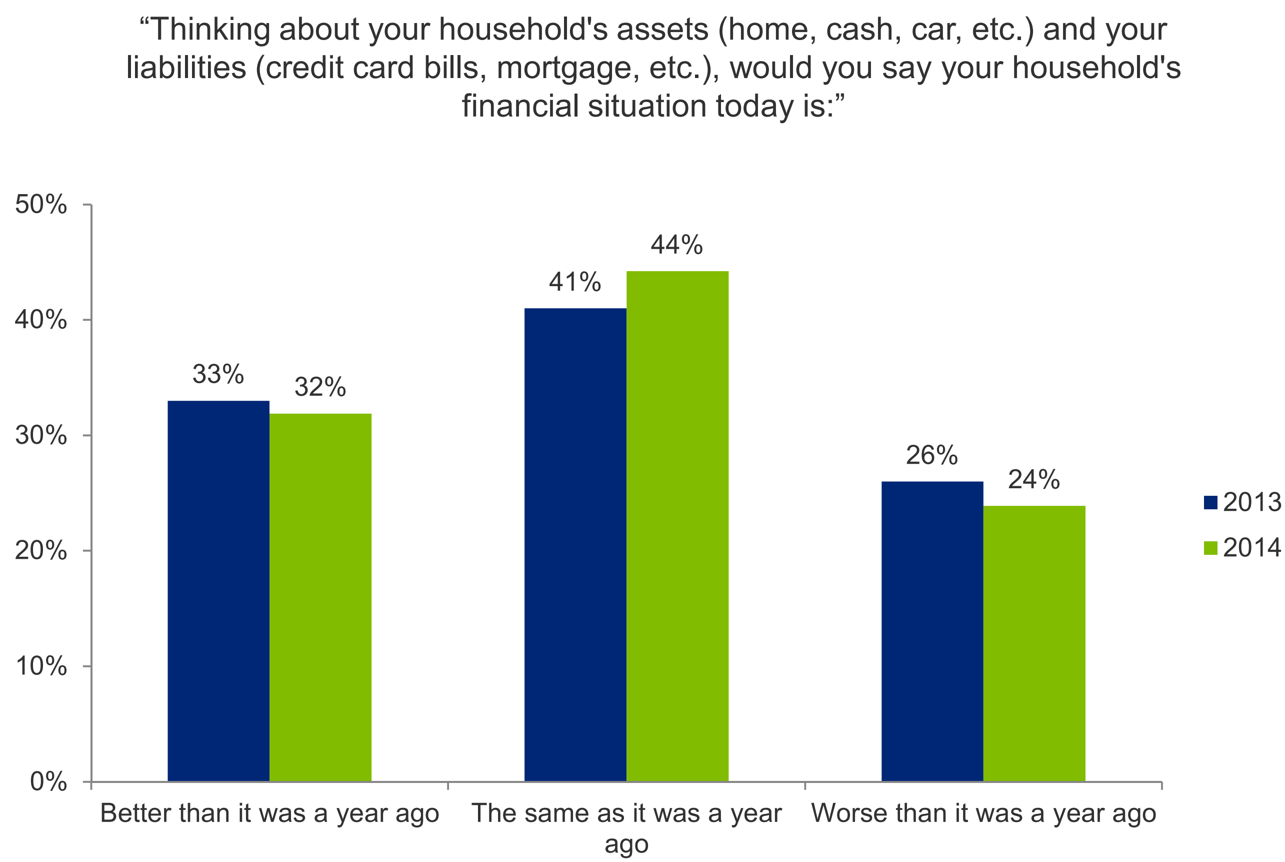
“How do you think the U.S. economy is performing today?”



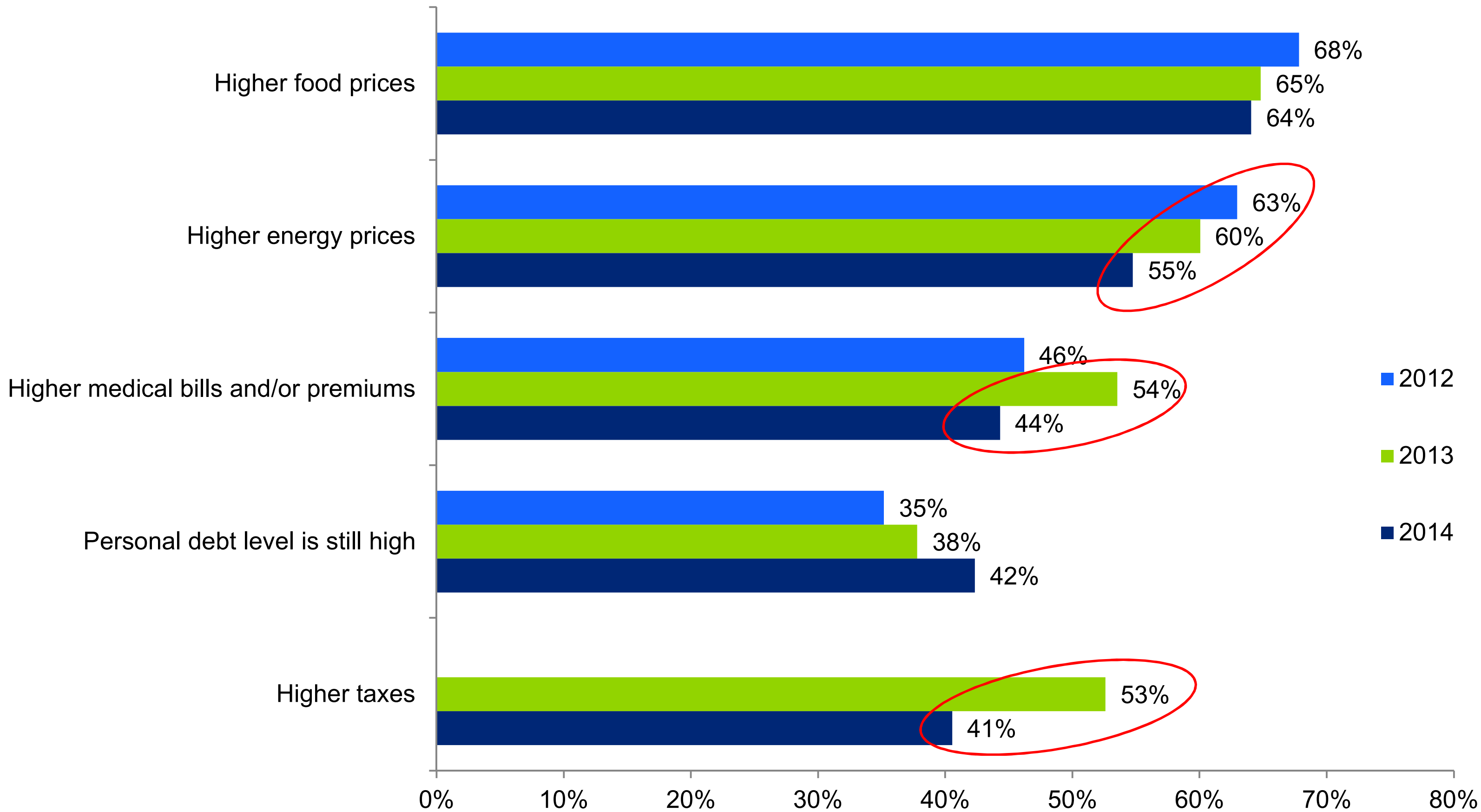


Consumers' financial situation remains unchanged

76% of respondents say their financial situation is "better" or the "same" today



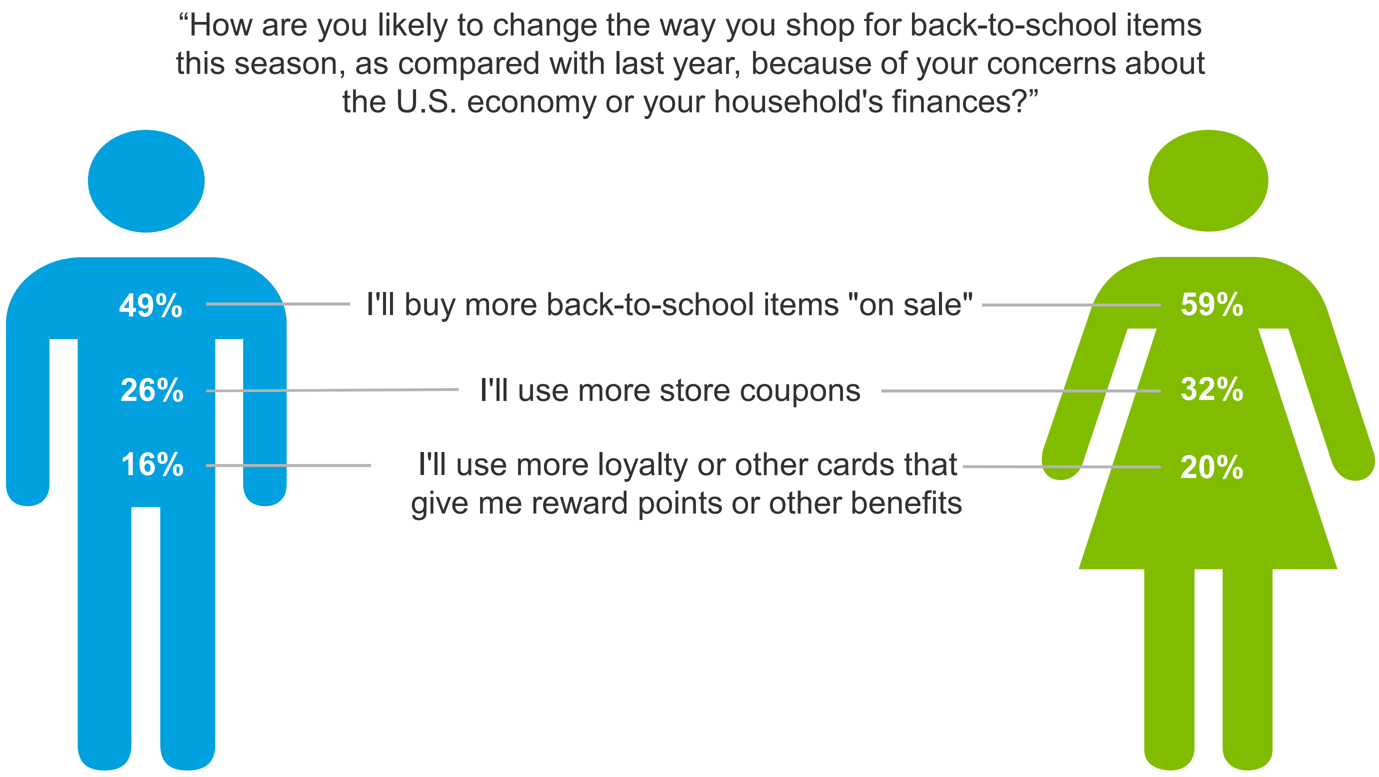
Top 5 concerns respondents have about the U.S. economy or their household's finances that could impact their back-to-school shopping



*No 2012 data available for "higher taxes" answer choice
** Answer choices below 41% not represented

Differences in intended shopping behaviors

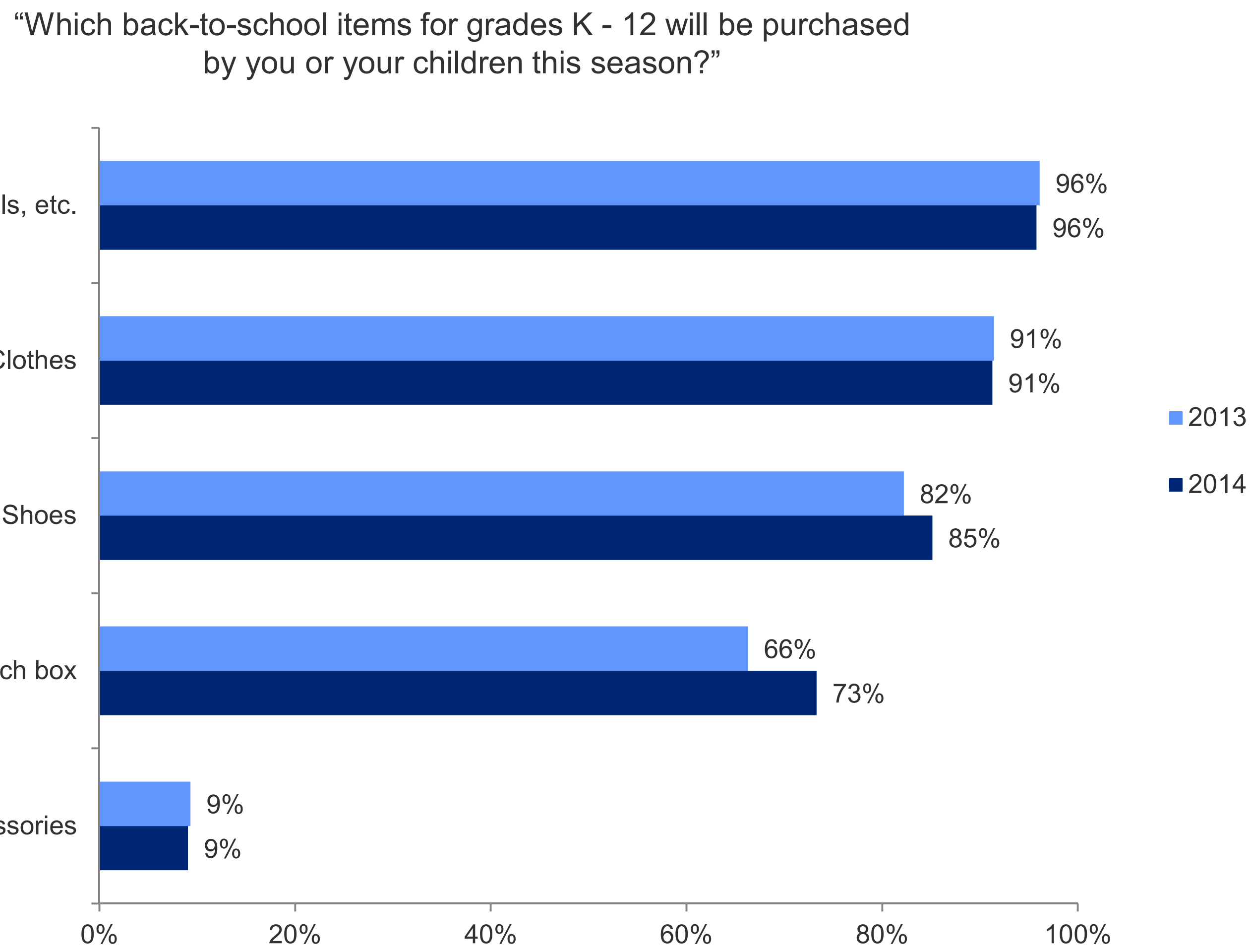
Female respondents plan to be more price and budget conscious when shopping for back-to-school items



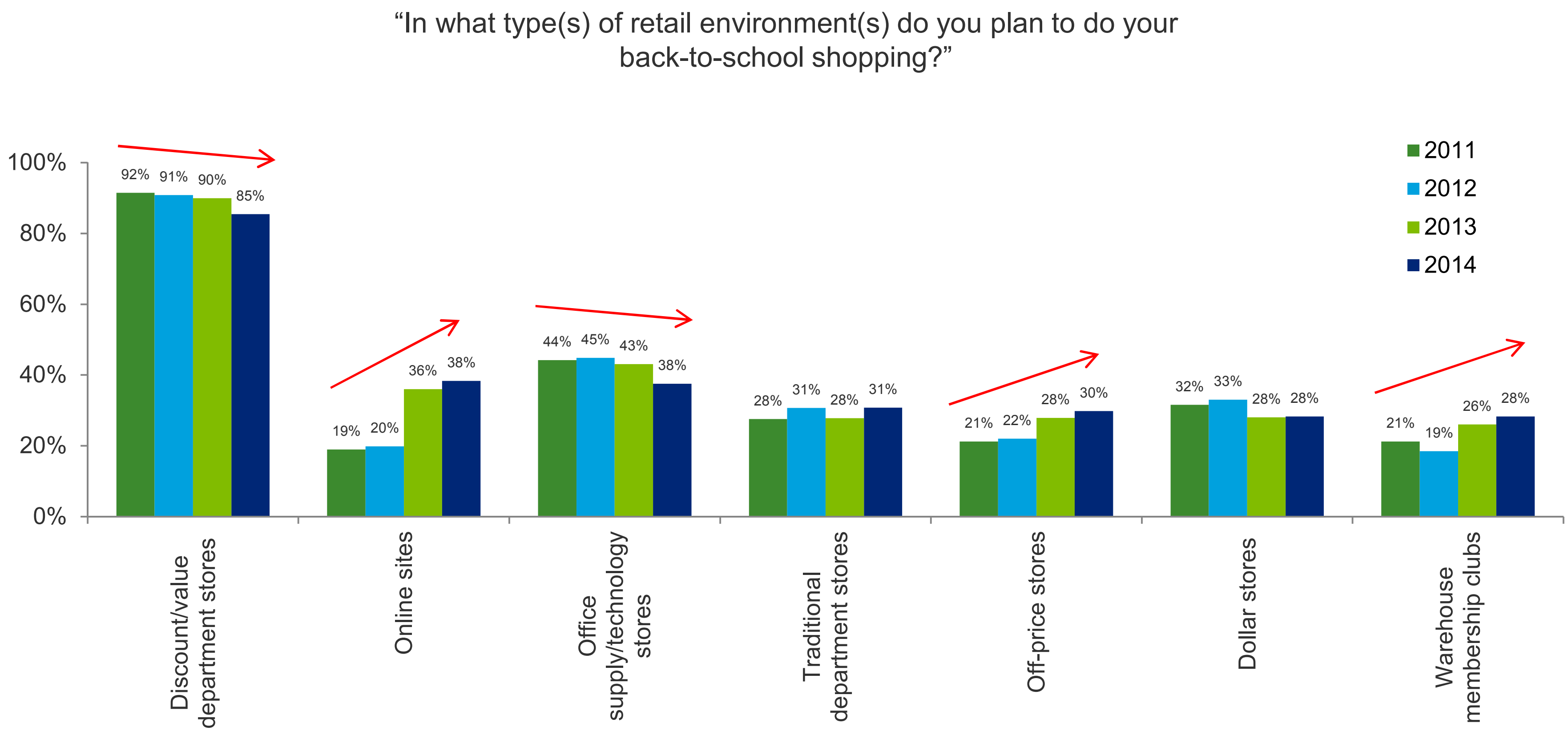
58% of female shoppers have a budget in mind when shopping this back-to-school season, as compared to 47% of male shoppers

Items most in demand this back-to-school season

Percent of respondents who expect to purchase …



Top 5 retail environments consumers plan to shop



% of respondents who will shop at "online sites" increased from 19% in 2011 to 38% in 2014

*Retail environments below 28% not presented in this chart

Ranking of store types since 2012

"Online sites" moves into the No. 2 spot for the first time in survey's history

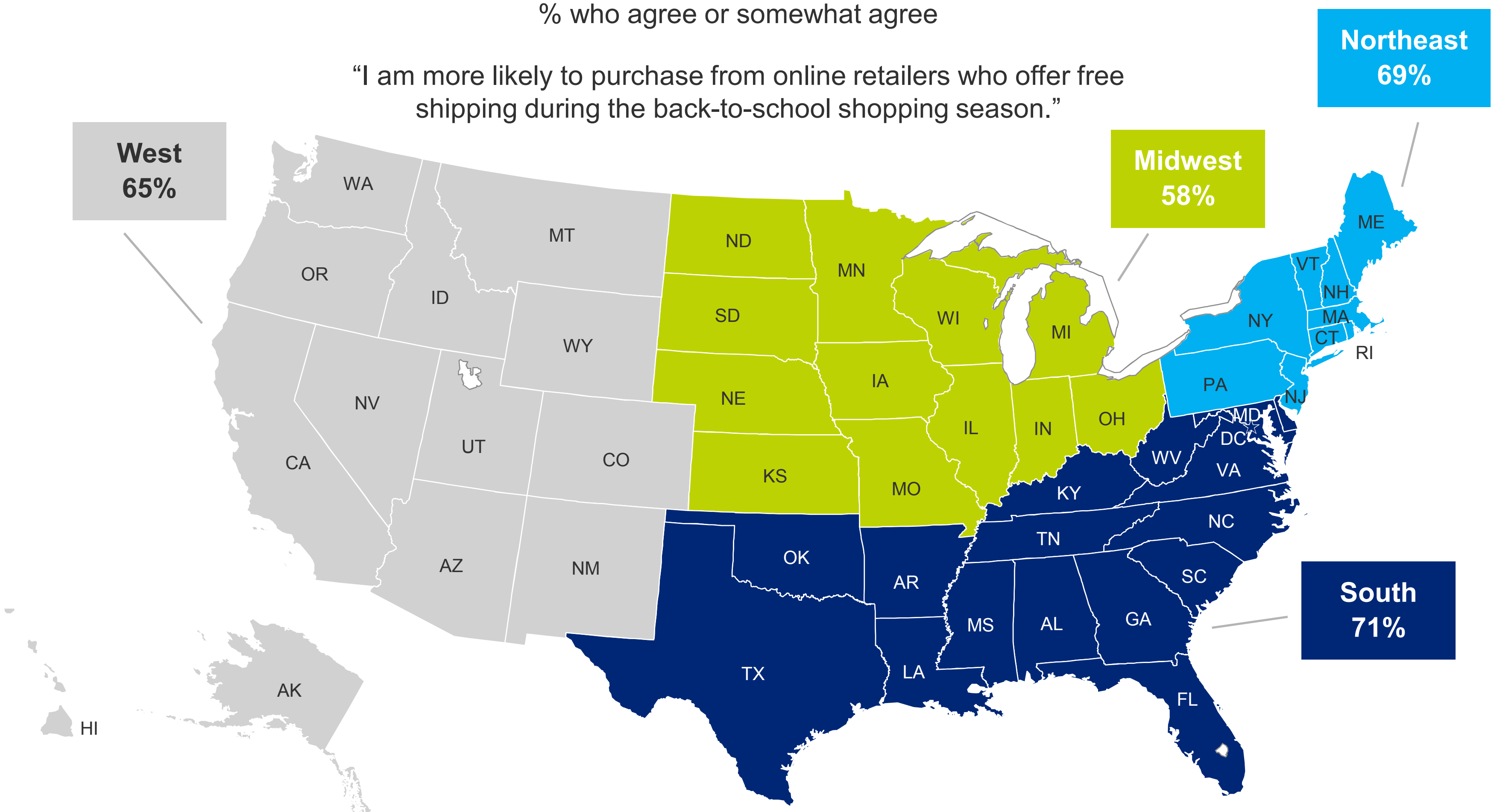
2012	**2013**	**2014**
1. Discount/value department stores	1. Discount/value department stores	1. Discount/value department stores
2. Office supply/technology stores	2. Office supply/technology stores	T2. Online sites
3. Dollar stores	3. Online sites	T2. Office supply/technology stores
4. Traditional department stores	4. Specialty clothing stores	3. Traditional department stores
5. Specialty clothing stores	5. Dollar stores	4. Off-price stores
6. Off-price stores	6. Off-price stores	T5. Dollar stores
7. Drug stores	7. Traditional department stores	T5. Warehouse membership clubs
8. Online sites	8. Warehouse membership clubs	6. Specialty clothing stores
9. Warehouse membership clubs	9. Drug stores	7. Drug stores
T10. Consignment shops/thrift stores	10. Consignment shops/thrift stores	8. Consignment shops/thrift stores
T10. Supermarkets		9. Fast fashion apparel stores
		10. Supermarkets

Respondents find value in free shipping

Shoppers in the south are more likely than others to prioritize free shipping

% who agree or somewhat agree

"I am more likely to purchase from online retailers who offer free shipping during the back-to-school shopping season."

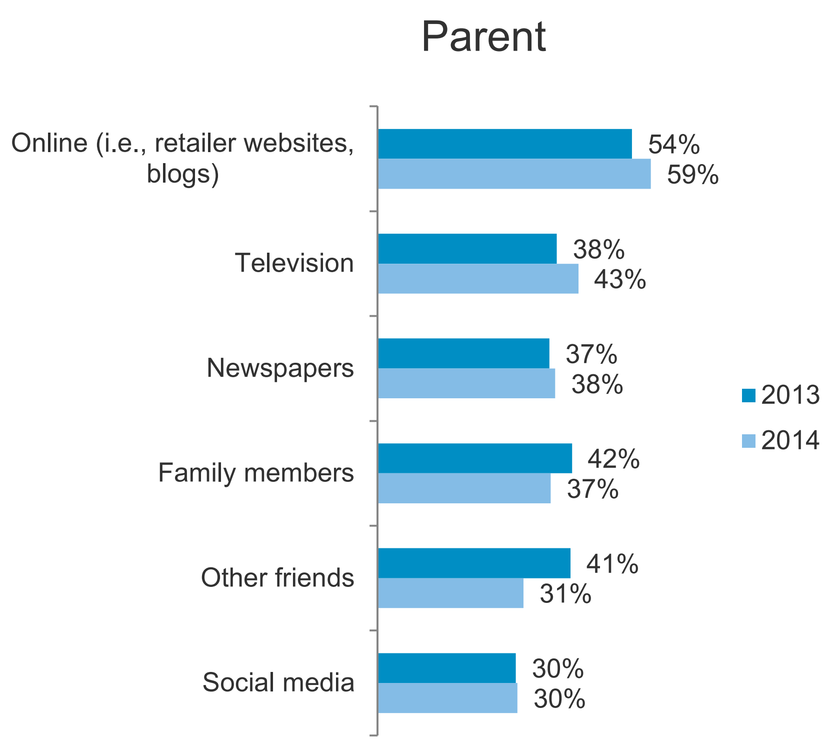


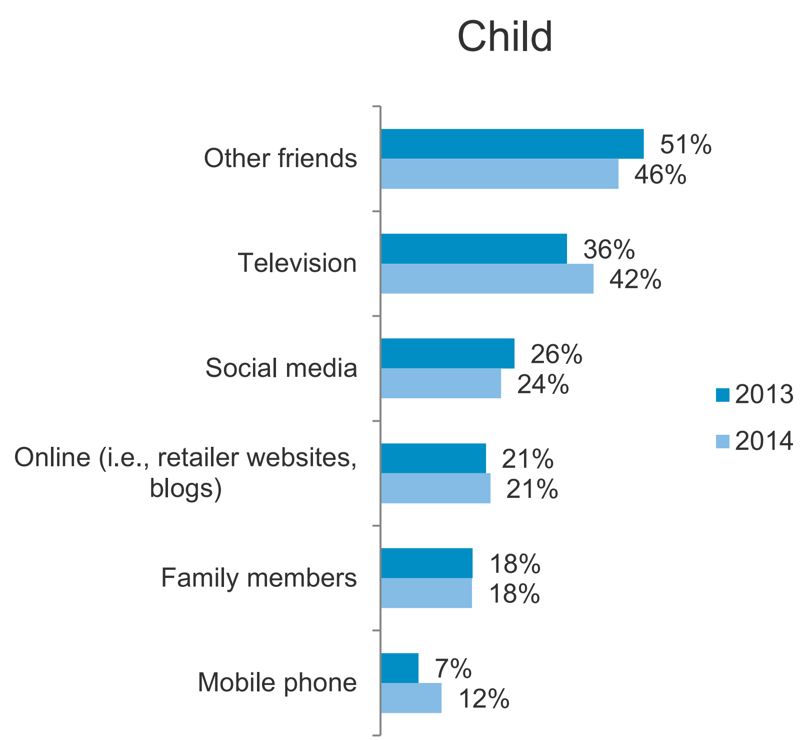
Two-thirds (66%) of all respondents are likely to purchase from online retailers who offer free shipping

Sources of information on back-to-school items

"Online" trumps traditional sources among parents; children still looking to friends

"Where are you and your children most likely to hear about the items that you intend to purchase this back-to-school shopping season?"

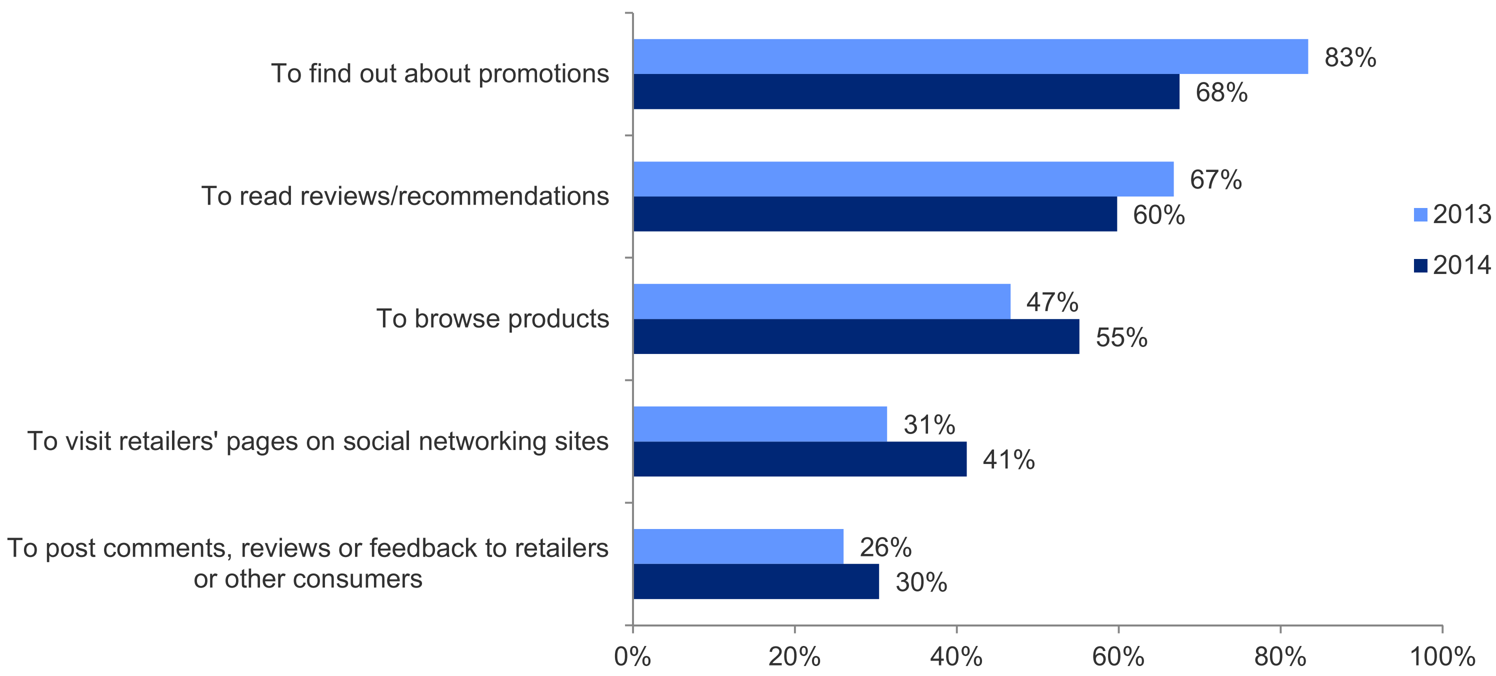




Nearly 1 in 5 (18%) respondents plans to use social media sites in their back-to-school shopping

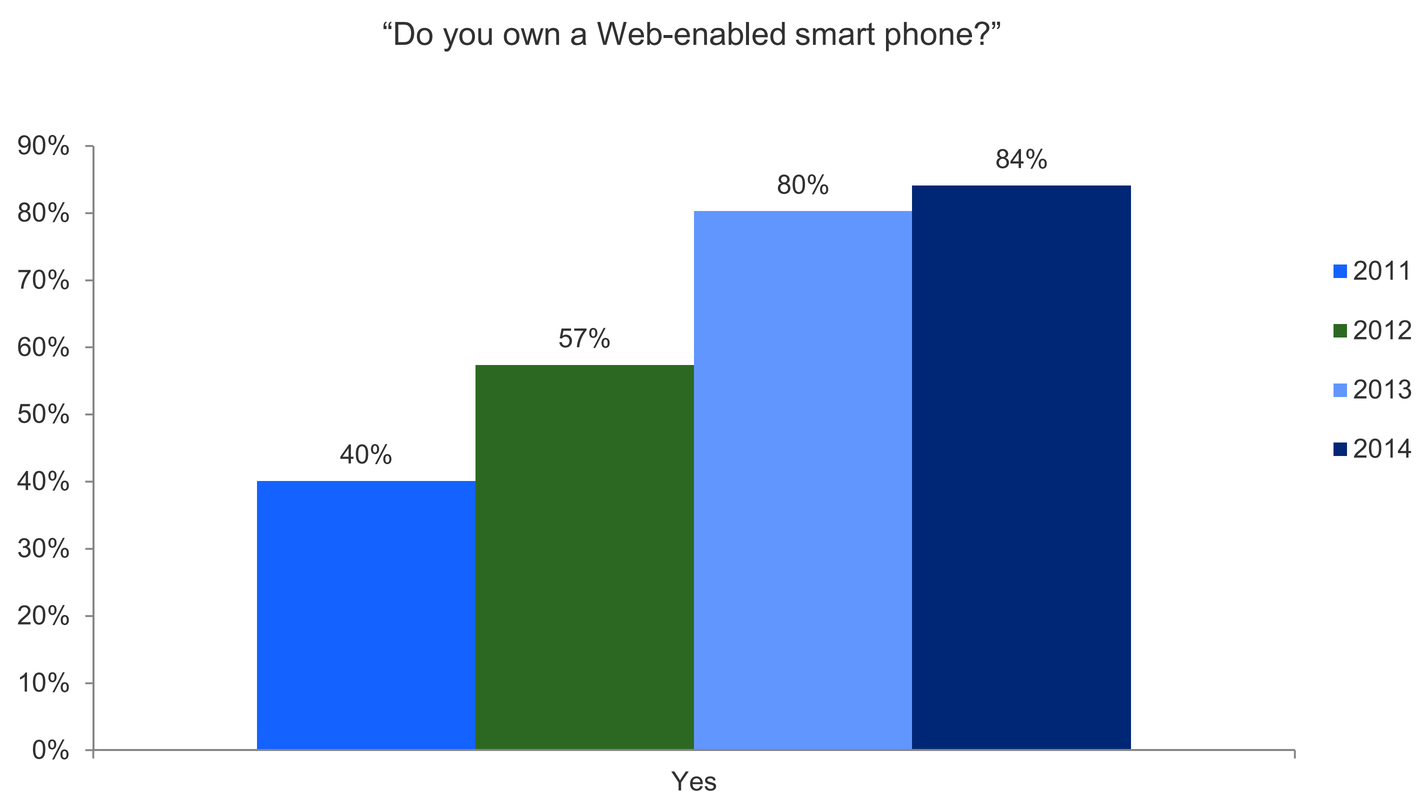
“With regard to your back-to-school shopping, how do you plan to use social media sites?”

[Base: Among those planning to use social media]



Smart phone ownership continues to rise

More than 8 in 10 (84%) respondents own a smart phone today



Among smart phone owners, nearly 3 in 4 (74%) respondents plan to use their device to assist with back-to-shopping – an increase of 10 percentage points since 2011

Uses of smart phones for back-to-school shopping

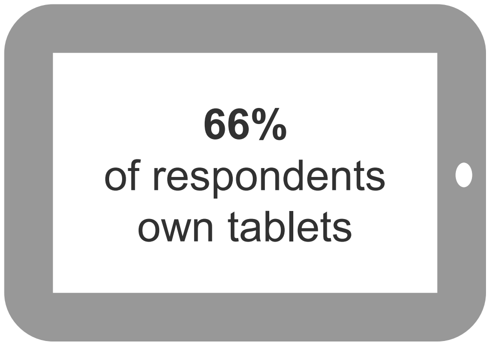
"With regard to your back-to-school shopping, for what purposes would you be using/would you likely use a smart phone?"

[Base: Among those who will use a smart phone to assist in back-to-school shopping]

2012	2013	2014
1. Get price information (62%)	1. Get price information (66%)	1. Get/download discounts, coupons, sale information (57%)
2. Get/download discounts, coupons, sale information (45%)	2. Get/download discounts, coupons, sale information (60%)	2. Get a store location (55%)
3. View a retailer's ad (44%)	3. Get store location (55%)	3. Get price information (53%)
4. Get a store location (38%)	4. Locate a store that carries a particular product (50%)	4. Access a retailer's website (46%)
5. Get product information (35%)	5. Access a retailer's website (44%)	5. Locate a store that carries a particular product (41%)

Two-thirds of respondents own tablets

Among tablet owners, 6 in 10 (60%) will use them to shop for back-to-school items



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

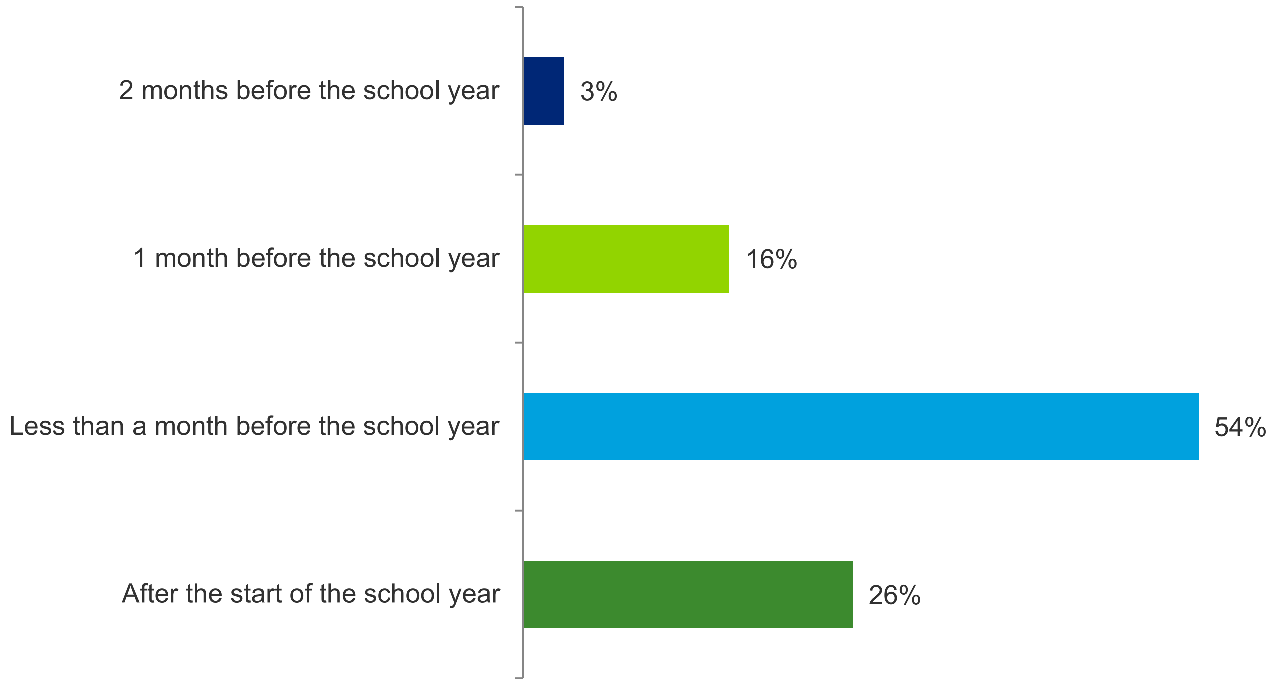
[Base: Among those who will use a tablet to assist in back-to-school shopping]

Respondents are concerned about the protection of their personal data

Respondents will likely wait to shop

More than half of respondents (54%) expect to complete their back-to-school shopping less than a month before the school year

"When do you plan to *complete* your back-to-school shopping?"



Additional shopping behaviors and influences

68%	My back-to-school shopping is influenced more by the school's recommended product list than my child's requests
57%	I'll do research online first before purchasing back-to-school products in the physical store
53%	I will take advantage of tax-free shopping weekends in my state or another state if offered
40% (33% in 2013)	I prefer to purchase from those retailers that offer an option to buy online/pick-up in-store or buy online/return to store

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