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?”

- 2013: $672
- 2014: $543
- 2015: $434

• 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

“When do you plan to complete your back-to-school shopping?”

- 2 months before the school year: 3% (2014), 1% (2015)
- 1 month before the school year: 16% (2014), 13% (2015)
- Less than a month before the school year: 54% (2014), 54% (2015)
- After the start of the school year: 26% (2014), 31% (2015)
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?”

- Yes: 35% (2014) vs. 31% (2015)
- No: 48% (2014) vs. 49% (2015)
- Don’t know/no opinion: 16% (2014) vs. 20% (2015)

“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 …”

- Better than it was a year ago: 32% (2014) vs. 35% (2015)
- The same as it was a year ago: 44% (2014) vs. 44% (2015)
- Worse than it was a year ago: 24% (2014) vs. 21% (2015)
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?”

- Higher food prices: 64% (2014), 60% (2015)
- Higher medical bills and/or premiums: 44% (2014), 46% (2015)
- Personal debt level is still high: 42% (2014), 40% (2015)
- Political unrest in other countries: 28% (2014), 29% (2015)
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)

-15%  -10%  -5%  0%  5%  10%  15%

-14%  I'll use more store coupons
-11%  I'll buy more lower-priced back-to-school items
-8%   I'll buy more back-to-school items “on sale”
13%   Our household will reuse last year’s school items rather than buying new
12%   I'll research more back-to-school items online to find the best prices
10%   I'll purchase more back-to-school items online, to find the best prices
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

“Please indicate if you plan to buy in-store or online or both in-store and online.”

| School supplies: Paper, pencils, books, etc. | 87% | 11% | 2% | 1 |
| Clothes | 64% | 4% | 33% | 2 |
| Shoes | 80% | 5% | 15% | 3 |
| Backpack/book bag/lunch box | 71% | 10% | 18% | 4 |
| Jewelry/handbag/personal accessories | 66% | 7% | 27% | 5 |
| Technology devices | 49% | 25% | 26% | 6 |
| Wearable devices | 30% | 41% | 30% | 7 |

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

“In what types of retail environments do you plan to do your back-to-school shopping?”

- Discount/value department stores
  - 2012: 91%
  - 2013: 90%
  - 2014: 85%
  - 2015: 86%

- Online sites
  - 2012: 20%
  - 2013: 36%
  - 2014: 38%
  - 2015: 44%

- Office supply/technology stores
  - 2012: 45%
  - 2013: 43%
  - 2014: 38%
  - 2015: 40%

- Specialty clothing stores
  - 2012: 30%
  - 2013: 27%
  - 2014: 36%
  - 2015: 22%

- Off-price stores
  - 2012: 22%
  - 2013: 28%
  - 2014: 30%
  - 2015: 36%

- Traditional department stores
  - 2012: 31%
  - 2013: 28%
  - 2014: 31%
  - 2015: 30%
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.

### Retail environments to be shopped by age cohort

<table>
<thead>
<tr>
<th>Retail Environment</th>
<th>18 - 29%</th>
<th>30 - 44%</th>
<th>45 - 60%</th>
<th>61 - 74%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount/value department stores</td>
<td>80%</td>
<td>88%</td>
<td>86%</td>
<td>79%</td>
</tr>
<tr>
<td>Online sites</td>
<td>40%</td>
<td>43%</td>
<td>47%</td>
<td>40%</td>
</tr>
<tr>
<td>Office supply/technology stores</td>
<td>35%</td>
<td>31%</td>
<td>32%</td>
<td>38%</td>
</tr>
<tr>
<td>Off-price stores</td>
<td>55%</td>
<td>34%</td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>Specialty clothing stores</td>
<td>50%</td>
<td>34%</td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>Traditional department stores</td>
<td>40%</td>
<td>24%</td>
<td>36%</td>
<td>30%</td>
</tr>
</tbody>
</table>
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**?”

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

<table>
<thead>
<tr>
<th>Purpose</th>
<th>2015 Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get/download discounts, coupons, sale information</td>
<td>57%</td>
</tr>
<tr>
<td>Get price information</td>
<td>57%</td>
</tr>
<tr>
<td>Get a store location</td>
<td>53%</td>
</tr>
<tr>
<td>Access a retailer’s website</td>
<td>44%</td>
</tr>
<tr>
<td>Get product information</td>
<td>42%</td>
</tr>
<tr>
<td>Locate a store that carries a particular product</td>
<td>37%</td>
</tr>
<tr>
<td>Shop online</td>
<td>36%</td>
</tr>
</tbody>
</table>

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]

<table>
<thead>
<tr>
<th>Purpose</th>
<th>2015 Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shop online</td>
<td>65%</td>
</tr>
<tr>
<td>Get price information</td>
<td>64%</td>
</tr>
<tr>
<td>Access a retailer’s website</td>
<td>59%</td>
</tr>
<tr>
<td>Get product information</td>
<td>56%</td>
</tr>
<tr>
<td>Make a purchase</td>
<td>53%</td>
</tr>
<tr>
<td>Read product/retailer reviews</td>
<td>48%</td>
</tr>
<tr>
<td>View a retailer’s ad</td>
<td>46%</td>
</tr>
</tbody>
</table>

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?”

- Yes: 7%
- No: 93%

Among smart phone owners, 9% plan to engage with in-store beacon technology to a greater extent than last year while back-to-school shopping.

Only half (49%) of respondents know what in-store beacon technology is.

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?”

<table>
<thead>
<tr>
<th>Year</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>35%</td>
</tr>
<tr>
<td>2012</td>
<td>22%</td>
</tr>
<tr>
<td>2013</td>
<td>21%</td>
</tr>
<tr>
<td>2014</td>
<td>18%</td>
</tr>
<tr>
<td>2015</td>
<td>10%</td>
</tr>
</tbody>
</table>
Respondents are concerned about the protection of their personal data

% who agree or somewhat agree

- I am concerned about the protection of my personal data when shopping online: 65% (2014) and 68% (2015)
- I am more concerned about the protection of my personal data when shopping online than one year ago: 55% (2014) and 54% (2015)
- I am concerned about shopping at retailers that have experienced a data breach: 53% (2014) and 52% (2015)
- I am concerned about the protection of my personal data when shopping in the physical store: 51% (2014) and 50% (2015)
- I am more likely to shop at a retailer who provides me education surrounding the security of my personal data: 44% (2014) and 40% (2015)
- I will use a different form of payment when shopping as a result of a data breach: 33% (2014) and 28% (2015)
# Trends impacting school buying: From school lists to free shipping, and “buy online, pick up in store”

<table>
<thead>
<tr>
<th>% who agree or somewhat agree</th>
<th>Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>69%</td>
<td>My back-to-school shopping is influenced more by the school’s recommended product list than my children’s requests</td>
</tr>
<tr>
<td>66%</td>
<td>I am more likely to purchase from online retailers who offer free shipping during the back-to-school shopping season</td>
</tr>
<tr>
<td>38%</td>
<td>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</td>
</tr>
<tr>
<td>32%</td>
<td>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</td>
</tr>
<tr>
<td>17%</td>
<td>I will shop physical stores less this back-to-school season because the option to “buy online, pick up in store” is more convenient</td>
</tr>
</tbody>
</table>
2015 Back-to-College Survey
Reading, writing, and retail

Conducted July 5-13, 2015
450 responses
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?”

<table>
<thead>
<tr>
<th>Year</th>
<th>Expected Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>$1,360</td>
</tr>
<tr>
<td>2014</td>
<td>$1,223</td>
</tr>
<tr>
<td>2015</td>
<td>$1,313</td>
</tr>
</tbody>
</table>
Top 5 college items most in demand

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

“Which back-to-college items will you or your children be purchasing this season?”

- **College supplies: Textbooks, calculator, etc.**
  - 2014: 85%
  - 2015: 84%

- **Clothes**
  - 2014: 82%
  - 2015: 79%

- **Shower and bathing items**
  - 2014: 61%
  - 2015: 62%

- **Shoes**
  - 2014: 61%
  - 2015: 61%

- **Dorm accessories and supplies: Bedding, storage solutions, etc.**
  - 2014: 55%
  - 2015: 57%

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?”

- Discount/value department stores: 77% (2014), 74% (2015)
- Internet, excluding auction sites: 44% (2014), 43% (2015)
- Office supply/technology stores: 40% (2014), 41% (2015)

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

% who agree or somewhat agree

- I prefer to purchase from those retailers that offer an option to buy online/pick-up in-store or buy online/return to store this back-to-college season: 48% (men), 58% (women)
- I will only shop in stores that offer sales this back-to-college season: 49% (men), 62% (women)
- I will purchase more items online to find the best prices this back-to-college shopping season: 62% (men), 58% (women)
- I will seek more discounts, coupons, and deals when back-to-college shopping this season: 72% (men), 77% (women)

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.

“Which of the following electronic devices do you [parent] own?”

- Smart phone: 80% (2014), 88% (2015)

“Which of the following electronic devices does your college going children own?”

- Smart phone: 89% (2014), 90% (2015)
- Tablet: 32% (2014), 37% (2015)
- Digital camera: 34% (2014), 45% (2015)
- Wearable device: 10% (2014), 10% (2015)

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?”

- From the college/university itself: 55% (Parent), 53% (Children)
- Online (i.e., blogs, online reviews, etc.): 54% (Parent), 42% (Children)
- Friends: 74% (Parent), 46% (Children)
- Family members: 39% (Parent), 38% (Children)
- In-store product displays: 24% (Parent), 17% (Children)
- Social media: 51% (Parent), 22% (Children)
- Mobile phone: 14% (Parent), 26% (Children)
- Newspapers: 13% (Parent), 4% (Children)
- Catalogs: 13% (Parent), 8% (Children)
- Television: 10% (Parent), 11% (Children)
- Magazines: 9% (Parent), 8% (Children)

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?”

- **July**: 19% (2013), 19% (2014), 18% (2015)
- **Early August**: 60% (2013), 62% (2014), 55% (2015)
- **Late August**: 19% (2013), 17% (2014), 24% (2015)
- **September**: 2% (2013), 2% (2014), 2% (2015)
- **October**: 0% (2013), 0% (2014), 1% (2015)

51% of parents will complete their college shopping less than a month before the college year starts