2017 back-to-college survey
Insights from both parents and students
Deloitte’s 2017 back-to-college survey

Key insights

**Back-to-college spend is nearly twice that of K-12 back-to-school spend; shifts in venue preference are similar**

- B2C spend in absolute dollars (~$46B) remains flat to last year
- Mass merchants, off-price, and fast fashion are big winners; traditional department stores and specialty plunge
- College supplies and clothing still top shopping lists but technology products command the largest budgets
- Parents report higher spend than students, yet two-thirds are highly influenced by student preferences
- Parents believe in budget collaboration (67%); students think they drive shopping decisions (49%)

**In-store prevails, especially among parents, but shoppers seize digital opportunities**

- Parents are most likely to shop in store for all categories; students lean online except for clothing and housewares
- ~25% of shoppers are undecided as to whether they will shop online or in store and might be influenced
- Social media plays a particularly significant role in shopping by students—40% of whom rely on it for guidance
- Use of digital payments among both parents and students is up 40% since 2016
- 45% of students would take advantage of scan-as-you-shop mobile apps to avoid lengthy checkout

**Students prioritize experiences and look for savvy ways to save on purchases**

- Freshmen incur college startup costs that prompt them to spend more than students in other class years
- Experiences, like socializing and attending cultural and sporting events, are a budget priority for the majority of students, three quarters of whom will look for ways to economize on other purchases
- Students are budget savvy and tend to shop later in the season than their parents
Back-to-college (B2C) shopping season to reach $46B and account for 60% of annual college-related purchases in 2017

B2C shopping season touches...

7K+ Educational institutions*

60% of annual college purchases

19 Million college students

$46 Billion

* Post-secondary Title IV educational institutions
Note: Parent survey sample size (N) = 1,025; Student survey sample size (N) = 1,025.
While back-to-college spending is expected to remain flat to last year, it is massive at nearly two-thirds of seasonal spend.

Back-to-college vs. back-to-school (K-12) spend

- **2016**
  - Back-to-school spend: $46.5 B
  - Back-to-college spend: $26.0 B
  - Total: $72.5 B

- **2017**
  - Back-to-school spend: $45.8 B
  - Back-to-college spend: $26.8 B
  - Total: $72.6 B
Spend by parents is expected to remain flat at $1,347 in 2017 compared to $1,345 in 2016.

National average B2C spend by parents:

- National average: $1,347
- Northeast: 20% of total B2C spend by parents, $1,326
- West: 21% of total B2C spend by parents, $1,501
- Midwest: 20% of total B2C spend by parents, $1,195
- South: 39% of total B2C spend by parents, $1,373

Source: Deloitte survey
Note: Average spend based on shoppers from each region – South (n = 394), Northeast (n = 211), Midwest (n = 229), and West (n = 191).
Spend by **students** is also expected to remain almost flat at $1,051 in 2017 compared to $1,082 in 2016.

National average B2C spend by students:

- **$1,051**
- **Northeast** (20%): $994
- **West** (22%): $1,059
- **Midwest** (20%): $1,041
- **South** (39%): $1,083

**Source:** Deloitte survey

**Note:** Average spend based on shoppers from each region – South (n = 383), Northeast (n = 212), Midwest (n = 211), and West (n = 219).
While college supplies and clothing top most parents’ shopping lists, those who purchase computers spend most on that category.

Average spend planned by parents (2017): $1,347

By category

- **88%** plan to buy College supplies
  - Avg. spend $505

- **79%** plan to buy Clothing & accessories
  - Avg. spend $291

- **72%** plan to buy Household appliances
  - Avg. spend $205

- **48%** plan to buy Dorm furniture
  - Avg. spend $312

- **41%** plan to buy Computers & hardware
  - Avg. spend $648

- **34%** plan to buy Electronic gadgets & digital subscriptions
  - Avg. spend $314

Source: Deloitte survey
Note: Parent survey sample size (N) = 1,025.
Average spend is calculated only for the respondents who plan to purchase at least one item from the above mentioned category.
Students too are most likely to seek basic supplies but they report lower average spend in every category than parents.

Average spend planned by students (2017): $1,051

By category

- **College supplies**: 93% plan to buy, avg. spend $379
- **Clothing & accessories**: 78% plan to buy, avg. spend $192
- **Household appliances**: 71% plan to buy, avg. spend $173
- **Electronic gadgets & digital subscriptions**: 47% plan to buy, avg. spend $290
- **Computers & hardware**: 43% plan to buy, avg. spend $437
- **Dorm furniture**: 40% plan to buy, avg. spend $250

Source: Deloitte survey
Note: Student survey sample size (N) = 1,025.
Average spend is calculated only for the respondents who plan to purchase at least one item from the above mentioned category.
Mass merchants are most preferred, department stores plummet, and off-price stores gain traction with both parents and students

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

Parents

<table>
<thead>
<tr>
<th>Retail Environment</th>
<th>% Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass merchants</td>
<td>73%</td>
</tr>
<tr>
<td>Mass merchants (On-campus)</td>
<td>64%</td>
</tr>
<tr>
<td>Traditional department stores</td>
<td>34%</td>
</tr>
<tr>
<td>Office supply/technology stores</td>
<td>34%</td>
</tr>
<tr>
<td>Home electronics stores</td>
<td>33%</td>
</tr>
<tr>
<td>Bookstores (On-campus)</td>
<td>33%</td>
</tr>
<tr>
<td>Bookstores (Off-campus)</td>
<td>32%</td>
</tr>
<tr>
<td>Warehouse membership clubs</td>
<td>31%</td>
</tr>
<tr>
<td>Off-price stores</td>
<td>31%</td>
</tr>
<tr>
<td>Dollar stores</td>
<td>29%</td>
</tr>
<tr>
<td>Drug stores</td>
<td>28%</td>
</tr>
<tr>
<td>Fast fashion apparel retailers</td>
<td>27%</td>
</tr>
<tr>
<td>Supermarkets</td>
<td>27%</td>
</tr>
<tr>
<td>Retailer’s websites</td>
<td>22%</td>
</tr>
<tr>
<td>Consignment shops/thrift stores</td>
<td>18%</td>
</tr>
<tr>
<td>Home furnishings and housewares</td>
<td>15%</td>
</tr>
<tr>
<td>Specialty clothing stores</td>
<td>9%</td>
</tr>
<tr>
<td>Catalogs</td>
<td>8%</td>
</tr>
<tr>
<td>Retailer’s mobile apps</td>
<td>6%</td>
</tr>
</tbody>
</table>

Students

<table>
<thead>
<tr>
<th>Retail Environment</th>
<th>% Preference</th>
</tr>
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<td>Catalogs</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Deloitte survey
Parents sample (N) = 1,025; Students sample (N) = 1,025.
# Multi-select question; * 2017 vs. 2016 (YoY) % change in shoppers format preference

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Parents heed student preferences when they shop

Two out of three say that more than half of their B2C spending is influenced by the student

Parents: “What percentage of your back-to-college spending is influenced by your student?”

- 2% None
- 7% 1-25%
- 22% 26-50%
- 35% 51-75%
- 33% 76-100%

~68%
Students claim they will contribute more to the back-to-college shopping budget than parents expect they will cover.

Parent vs. student opinion: “Student contribution to total back-to-college shopping budget”

- 57% of students plan to contribute more than half of budget
- 21% of parents expect their kids to contribute more than half of budget

Source: Deloitte survey
Note: Students survey sample size (N) = 1,025; Parent survey sample size (N) = 1,025. Respondents who selected ‘Uncertain’ is not shown on this slide.

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Parents and students have different perceptions about who holds the purse strings, but both point to heavy student involvement.

Which of the following best describes your approach for back-to-college shopping?

### Parents

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I discuss budgeting and shop with my student(s)</td>
<td>67%</td>
</tr>
<tr>
<td>My student(s) set the budget and we shop together</td>
<td>10%</td>
</tr>
<tr>
<td>My student(s) set the budget and shop on their own</td>
<td>8%</td>
</tr>
<tr>
<td>I decide on the budget, my student shops alone</td>
<td>7%</td>
</tr>
<tr>
<td>I decide on the budget and shop on my own</td>
<td>3%</td>
</tr>
<tr>
<td>I discuss budgeting with my student(s), but shop alone</td>
<td>3%</td>
</tr>
</tbody>
</table>

### Students

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I decide on a budget and shop myself</td>
<td>49%</td>
</tr>
<tr>
<td>I discuss budgeting and shop with my parent(s)</td>
<td>26%</td>
</tr>
<tr>
<td>I discuss budgeting with my parent(s), but shop alone</td>
<td>20%</td>
</tr>
<tr>
<td>My parents set the budget and shop with me</td>
<td>4%</td>
</tr>
<tr>
<td>I decide on a budget, my parent(s) shop alone</td>
<td>1%</td>
</tr>
<tr>
<td>My parents set the budget and shop for me</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: Deloitte survey  
Parent sample (N) = 1,025; Student sample (N) = 1,025.
# Multi-select question
In-store remains the preferred shopping channel, but students are more likely than parents to shop online.

<table>
<thead>
<tr>
<th>Parents</th>
<th>Spending by channel</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Average spend</td>
<td>Share of spend</td>
</tr>
<tr>
<td></td>
<td>$657</td>
<td>49%</td>
</tr>
<tr>
<td></td>
<td>$338</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>$353</td>
<td>26%</td>
</tr>
</tbody>
</table>

Source: Deloitte survey
Parent sample (N) = 1,025; Student sample (N) = 1,025.

*Undecided (In-store/Online)
For parents, in-store remains the preferred channel across all categories, but many are still undecided about how they will shop.

Average expected B2C spend by parents is **$1,347**

### Overall B2C spending by channel

<table>
<thead>
<tr>
<th>Channel</th>
<th>In-store</th>
<th>Online</th>
<th>Undecided*</th>
<th>Total Suggested Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$657</strong></td>
<td></td>
<td></td>
<td></td>
<td>$1,347</td>
</tr>
<tr>
<td><strong>$338</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>$353</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Undecided (In-store/Online)

### Category spending by channel (%)

<table>
<thead>
<tr>
<th>Category</th>
<th>In-store</th>
<th>Online</th>
<th>Undecided (In-store/Online)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computers &amp; hardware</td>
<td>27%</td>
<td>32%</td>
<td>40%</td>
<td>$648</td>
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<td>29%</td>
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<tr>
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<td>17%</td>
<td>59%</td>
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</tr>
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<td>Household appliances</td>
<td>23%</td>
<td>12%</td>
<td>65%</td>
<td>$205</td>
</tr>
</tbody>
</table>

Source: Deloitte survey

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Students are more likely than their parents to shop online but still prefer physical stores when purchasing clothing or housewares.

Average expected B2C spend by students is $1,051.

### Overall B2C spending by channel

- **In-store**
  - $431
- **Online**
  - $365
- **Undecided***(In-store/Online)*
  - $254

### Category spend by channel (%)

<table>
<thead>
<tr>
<th>Category</th>
<th>In-store</th>
<th>Online</th>
<th>Undecided (In-store/Online)</th>
</tr>
</thead>
<tbody>
<tr>
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<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>Dorm furniture</td>
<td>47%</td>
<td></td>
<td>27%</td>
</tr>
<tr>
<td>Clothing &amp; accessories</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Household appliances</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Deloitte survey

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Shoppers are likely to shift spend from traditional supplies to digital alternatives

<table>
<thead>
<tr>
<th>Statement</th>
<th>Students</th>
<th>Parents</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am more likely to purchase from online retailers who offer free shipping during the back-to-college shopping season</td>
<td>81%</td>
<td>78%</td>
</tr>
<tr>
<td>Do research online first before purchasing back-to-college products in a physical store</td>
<td>75%</td>
<td>68%</td>
</tr>
<tr>
<td>Shop at different points throughout the Summer to take advantage of deals</td>
<td>65%</td>
<td>75%</td>
</tr>
<tr>
<td>I prefer to purchase from those retailers that offer an option to buy online and return to store this back-to-college season</td>
<td>52%</td>
<td>53%</td>
</tr>
<tr>
<td>I buy fewer traditional college supplies because student uses digital technologies more often in and out of the classroom</td>
<td>47%</td>
<td>63%</td>
</tr>
<tr>
<td>With online shopping, I prefer loyalty programs that provide faster or cheaper shipping more than product discounts</td>
<td>46%</td>
<td>42%</td>
</tr>
<tr>
<td>I prefer to purchase from those retailers that offer an option to buy online and pick-up in-store this back-to-college season</td>
<td>42%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Source: Deloitte survey
Note: Parent sample size (N) = 1,025; Student survey sample size (N) = 1,025.
* Percent represents respondent who agreed or somewhat agreed with statements.
Students use their smartphones more for B2C shopping

B2C shoppers from both groups are more likely to purchase using a desktop/laptop than a mobile device.

### Top 5 uses of devices

**Parents**

- **Desktop/laptop**
  - Access a retailer’s website: 77%
  - Make a purchase: 69%
  - Get price information: 68%
  - Compare products to...: 55%
  - Get product information: 55%

**Students**

- **Desktop/laptop**
  - Get price information: 74%
  - Access a retailer’s website: 72%
  - Make a purchase: 65%
  - Get product information: 63%
  - Compare products to...

- **Smartphones**
  - Get price information: 69%
  - Access a retailer’s website: 65%
  - Collect discounts, coupons,...: 56%
  - Find a store location: 56%
  - Access a mobile shopping app: 49%

- **Tablet**
  - Access a retailer’s website: 75%
  - Get price information: 66%
  - Make a purchase: 60%
  - Get product information: 60%
  - Compare products to...: 57%
Use of social media is high among students who are more likely to post/view virtual image boards and watch video than parents.

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

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

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

<table>
<thead>
<tr>
<th>Social media use</th>
<th>Students (n=401)</th>
<th>Parents (n=164)</th>
</tr>
</thead>
<tbody>
<tr>
<td>To read reviews/recommendations</td>
<td>65%</td>
<td>60%</td>
</tr>
<tr>
<td>To browse products</td>
<td>64%</td>
<td>57%</td>
</tr>
<tr>
<td>To find information on promotions/view ads</td>
<td>64%</td>
<td>66%</td>
</tr>
<tr>
<td>To receive a coupon</td>
<td>63%</td>
<td>59%</td>
</tr>
<tr>
<td>To visit retailers’ pages on social networking sites</td>
<td>29% (34%)</td>
<td></td>
</tr>
<tr>
<td>To post to or view virtual image boards</td>
<td>26%</td>
<td>13%</td>
</tr>
<tr>
<td>To watch a retail/product video</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>To post comments, reviews or feedback to retailers or other...</td>
<td>12% (17%)</td>
<td></td>
</tr>
</tbody>
</table>

Source: Deloitte survey

Note: Student survey sample size (respondents who use at least one digital device for shopping) = 994; Parents = 164; Multi select question

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Parents most often shop with credit cards, whereas students favor debit cards; use of digital payments increased 40%.

"Which of the following payment methods will you likely use for your back-to-college purchases?"

Parents:
- Debit card: 53%
- Credit card: 66%
- Cash/check: 42%
- Gift card: 8%
- Digital payments: 11%
- Other: 1%

Students:
- Debit card: 72%
- Credit card: 53%
- Cash/check: 56%
- Gift card: 17%
- Digital payments: 12%
- Other: 1%

Source: Deloitte survey
Parent sample (N) = 1,025; Student sample (N) = 1,025.

2016 Digital payments: weighted average for both students/parents 6.8%
2017 2016 Digital payments: weighted average for both students/parents 11.5%
# Multi-select question
Student shoppers will use in-store technologies that provide value and convenience

### In-store technologies

<table>
<thead>
<tr>
<th>Technology</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scan-as-you-shop mobile apps to avoid lengthy check-out time</td>
<td>45%</td>
</tr>
<tr>
<td>QR codes to check for product information and reviews</td>
<td>38%</td>
</tr>
<tr>
<td>Location check-in platforms (ex. social media apps) to avail personalized deals and promotions</td>
<td>29%</td>
</tr>
<tr>
<td>Augmented Reality (AR) enabled platforms (ex. virtual reality fitting rooms for apparel) for product experience</td>
<td>25%</td>
</tr>
<tr>
<td>I don’t plan to use any in-store technology</td>
<td>29%</td>
</tr>
</tbody>
</table>

"If the following in-store technologies were available, are you likely to use it for the back-to-college shopping?"

Source: Deloitte survey
Note: Student survey sample size (N) = 719; multi-select
A majority of shoppers would increase their B2C spending across channels if offered a sales tax reduction/holiday.

Parents are more likely to take affirmative actions to avail sales tax reductions.

### Impact of sales tax reduction/holiday on increase in spending

<table>
<thead>
<tr>
<th></th>
<th>Parents</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase online spending</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>Increase in-store spending</td>
<td>54%</td>
<td>53%</td>
</tr>
</tbody>
</table>

- I would **increase my online spending** due to a sales tax reduction/holiday.
- I would **increase my in-store spending** due to a sales tax reduction/holiday.

### If sales tax reduction/holiday is not automatically included

<table>
<thead>
<tr>
<th></th>
<th>Parents</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not complete shopping and check out*</td>
<td>51%</td>
<td>43%</td>
</tr>
<tr>
<td>Demand to speak to a supervisor/manager**</td>
<td>44%</td>
<td>33%</td>
</tr>
</tbody>
</table>

- I would **NOT complete my shopping and check out**.
- I would **demand to speak to a supervisor/manager**.

* "If an online purchase did NOT automatically include the sales tax reduction/holiday, I would NOT complete shopping cart checkout”
** "If an in-store purchase did NOT automatically include the sales tax reduction/holiday, I would demand to speak to a supervisor/manager”

Source: Deloitte survey

% -- who agree or somewhat agree
Early shoppers are expected to spend more than those who wait
Parents are likely to spend more and start shopping earlier than students

B2C shopper by shopping start
Parents vs. students

Earlier than July: 21% Parents, 13% Students
Early in July: 21% Parents, 16% Students
Later in July: 27% Parents, 26% Students
Early in August: 24% Parents, 33% Students
Later in August: 5% Parents, 10% Students
September: 1% Parents, 2% Students
October: (no data)

Avg. spend of shoppers (Parents)
- Earlier than July: $1,605
- Early in July: $1,407
- Later in July: $1,374
- Early in August: $1,048
- Later in August: $905
- September: $963
- October: (no data)

Avg. spend of shoppers (Students)
- Earlier than July: $1,533
- Early in July: $1,374
- Later in July: $1,048
- Early in August: $838
- Later in August: $805
- September: $730
- October: (no data)
A majority of students are likely to account for experiences in their college budget planning

“Will college budget planning include these events as part of your university-level experiences?”

- Socializing with friends / classmates at restaurants, bistros or bars: 82%
- Cultural events such as concerts, theater, movies: 58%
- Socializing with friends / classmates at sporting events: 50%
- Independent movies, documentaries or other visual experiences: 26%
- Travel experiences such as backpacking during spring or summer breaks: 24%
- Travel experiences such as a semester abroad: 16%

Source: Deloitte survey
Note: Student survey sample size (N) = 1,025

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Budget-conscious students will buy used books and seek free shipping options to stretch their back-to-college funds

"Please indicate your level of agreement with the following statements (% who agree or somewhat agree)?”

- I am more likely to purchase from online retailers who offer free shipping during the back-to-college shopping season: 81%
- I will buy more used textbooks to help stretch my budget: 76%
- I will rent more textbooks to help stretch my budget: 66%
- I’m buying fewer traditional college supplies (ex. writing utensils, notebooks, etc.) because I am using more digital technologies (tablets/computers) in and out of the classroom: 47%

Source: Deloitte survey
Note: Student survey sample size (N) = 1,025
* Percent represents respondent who agreed or somewhat agreed with statements.
Freshmen spend most on college start up, but students make annual investments across all categories

College supplies and computers & hardware will account for more than half of student spending regardless of class year

**Spend distribution (%) by B2C category**

- **Household appliances**
  - Freshmen: 11%
  - Sophomore: 12%
  - Junior: 13%
  - Senior: 11%
  - Graduate: 13%

- **Electronic gadgets & digital subscriptions**
  - Freshmen: 11%
  - Sophomore: 12%
  - Junior: 14%
  - Senior: 16%
  - Graduate: 12%

- **Dorm furniture**
  - Freshmen: 24%
  - Sophomore: 19%
  - Junior: 15%
  - Senior: 16%
  - Graduate: 15%

- **Computers & hardware**
  - Freshmen: 32%
  - Sophomore: 33%
  - Junior: 34%
  - Senior: 36%
  - Graduate: 32%

- **College supplies**
  - Freshmen: 32%
  - Sophomore: 33%
  - Junior: 34%
  - Senior: 36%
  - Graduate: 32%

- **Clothing & accessories**
  - Freshmen: 12%
  - Sophomore: 14%
  - Junior: 13%
  - Senior: 16%
  - Graduate: 18%

**Avg. Spend**

- Freshmen: $1,452
- Sophomore: $955
- Junior: $1,074
- Senior: $838
- Graduate: $1,091

Source: Deloitte survey
Note: Freshmen (n) = 150; Sophomore (n) = 249; Junior (n) = 247; Senior (n) = 227; Graduate (n) = 152

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About the survey

This annual Deloitte survey was conducted online using an independent research panel between May 31 - June 13, 2017. The study involved two surveys, polling a sample of 1,025 parents with college-going children and 1,025 college-going students, and has a margin of error for the entire sample of plus or minus three percentage points.

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