

**Deloitte.**

# 2013 Back-to-School Survey

## Making the grade

**Conducted July 5-10, 2013**

**1,074 responses**

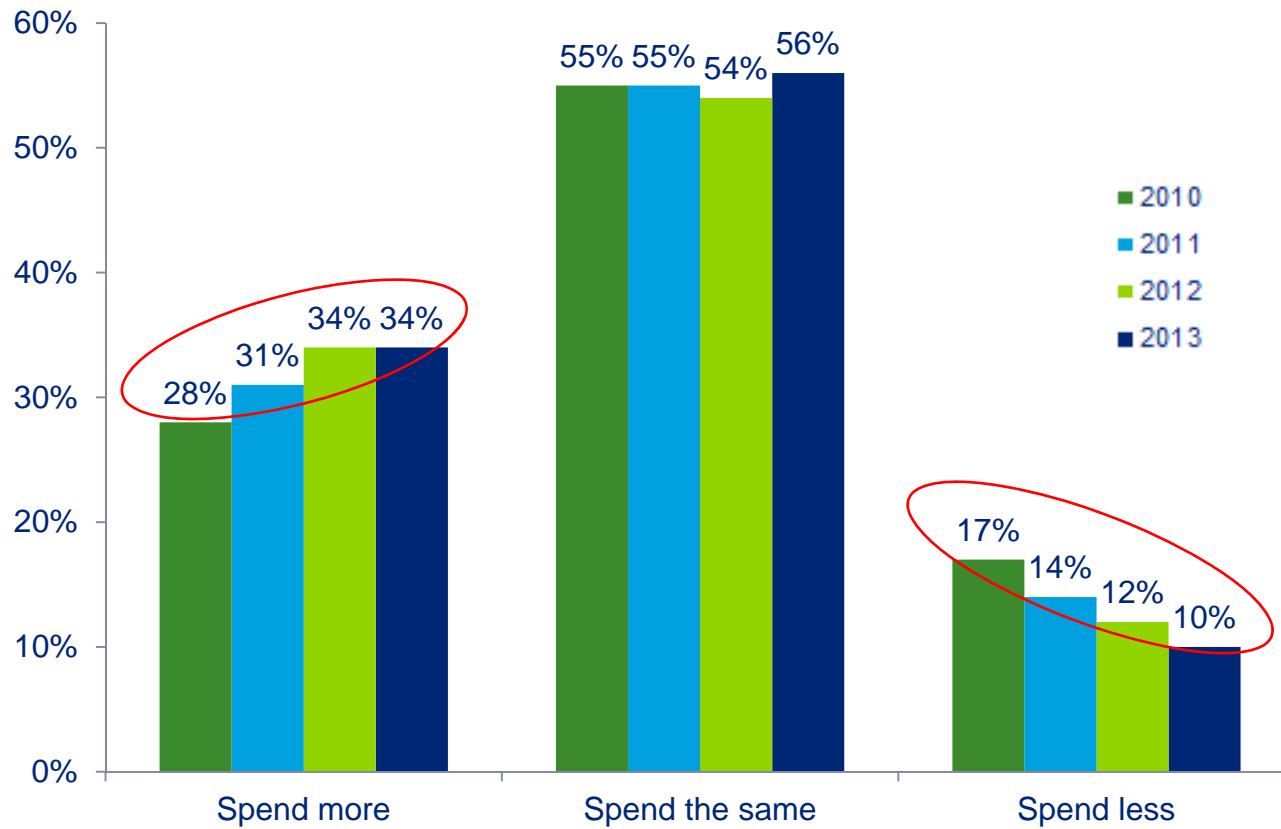


## About the survey

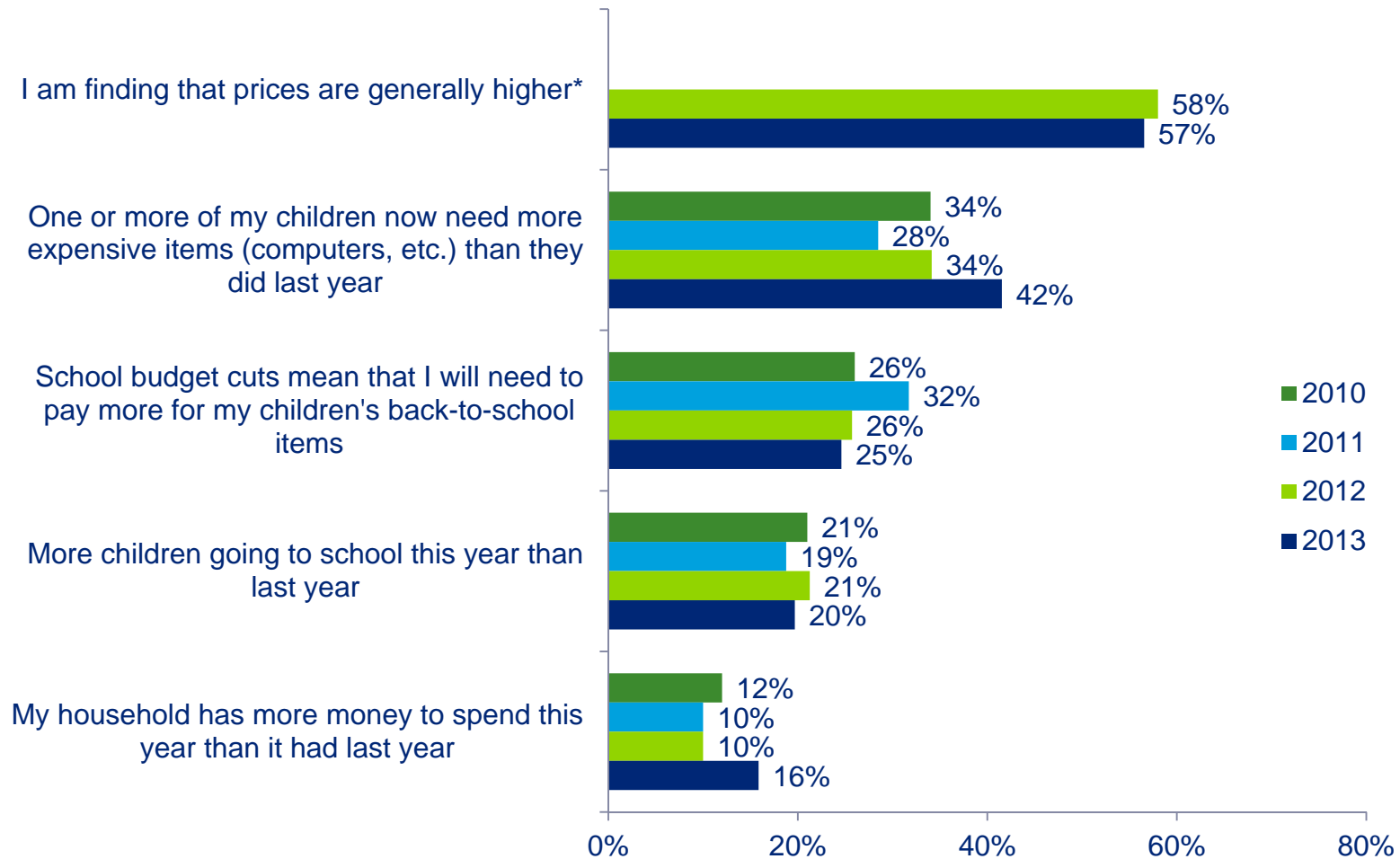
The survey was commissioned by Deloitte and conducted online by an independent research company between July 5 and 10, 2013. The survey polled a sample of 1,074 parents of school-aged children and has a margin of error for the entire sample of plus or minus three percentage points.

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

# Majority (90%) of respondents indicated they expect to spend more or the same on back-to-school items when compared to last year



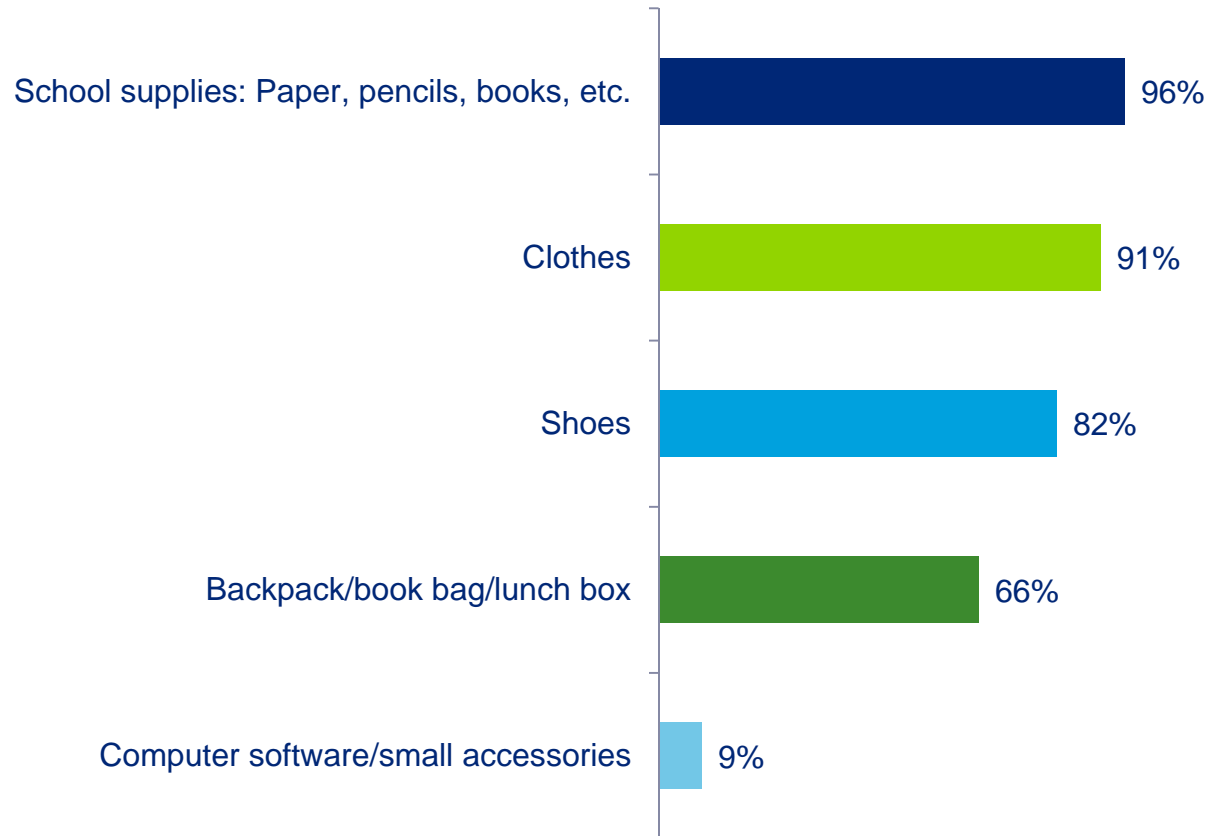
# Survey respondents' top 5 reasons for spending more



\*Data not available for 2010 and 2011

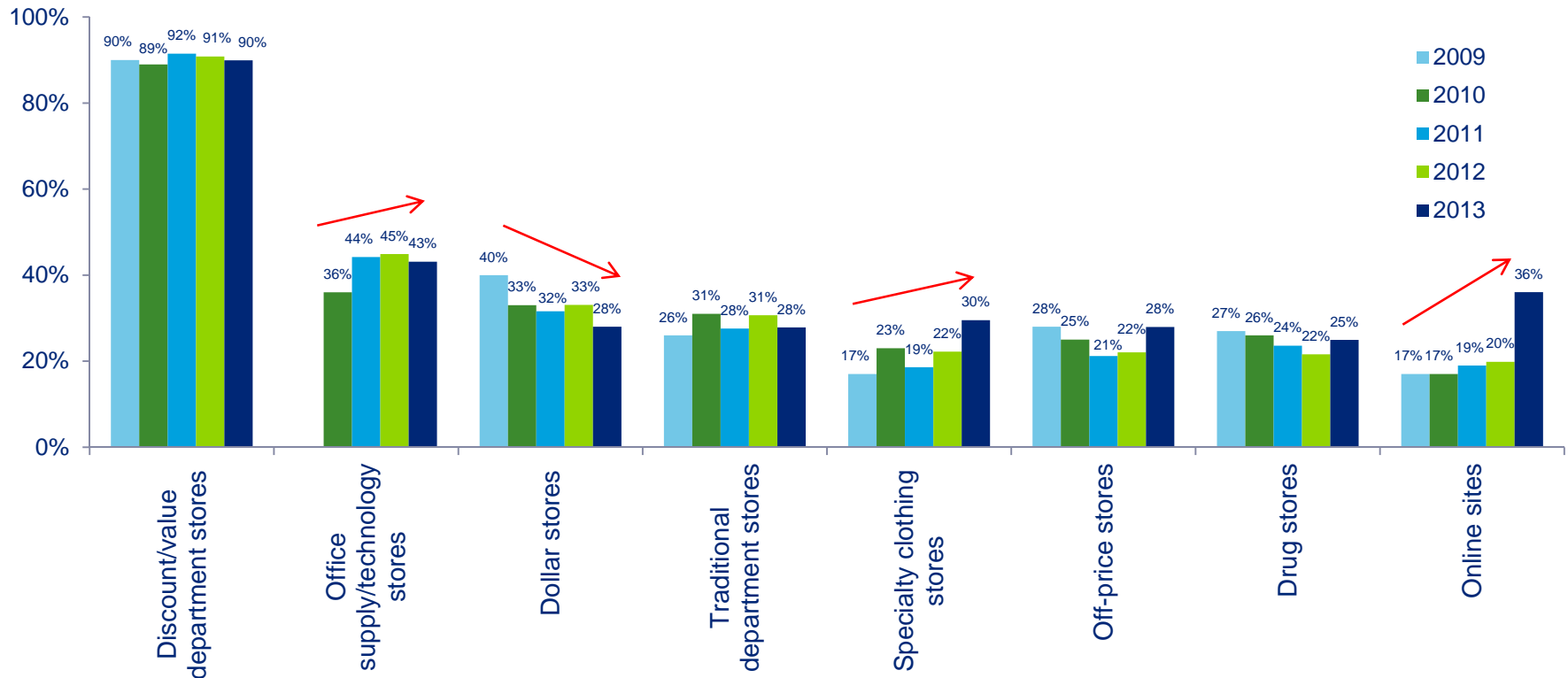
# Items most in demand, according to survey respondents

% who expect to purchase



# Retail environments where respondents plan to do their back-to-school shopping

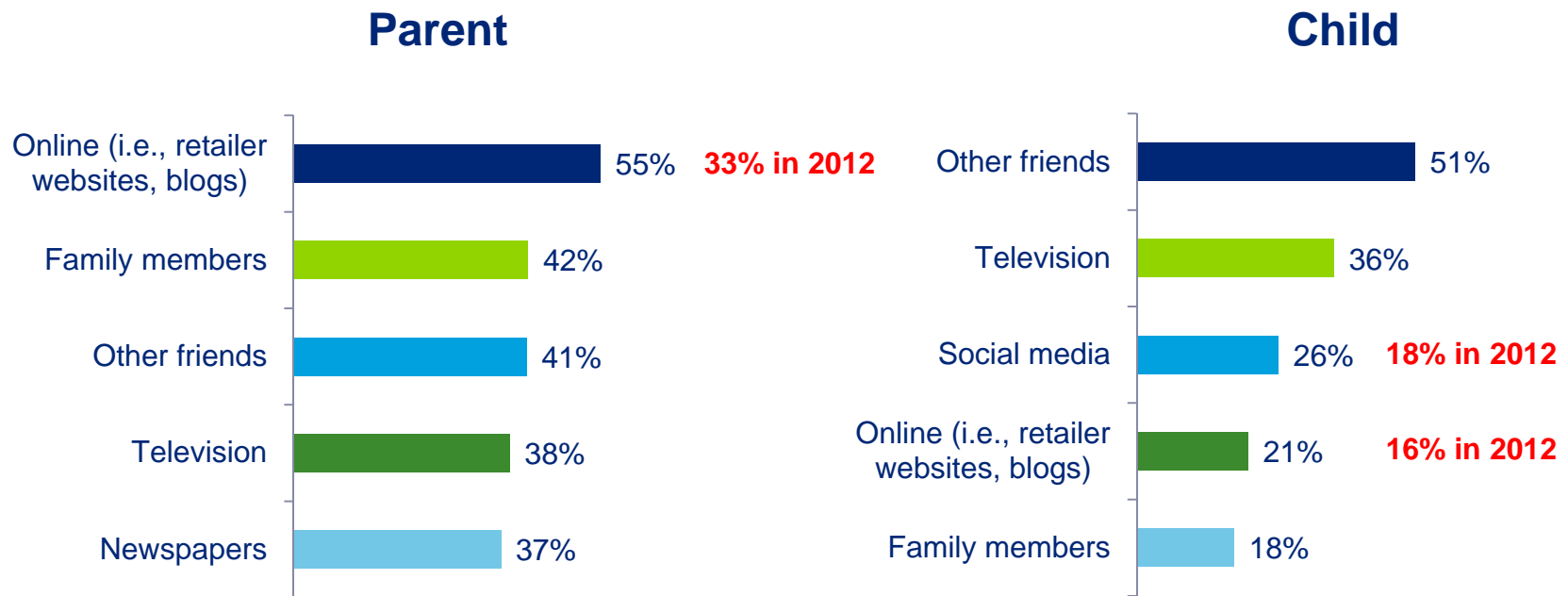
Most significant changes from 2009 are for “office supply/technology stores,” “dollar stores,” “specialty clothing stores” and “online sites.” All others had similar percentages in all four years.



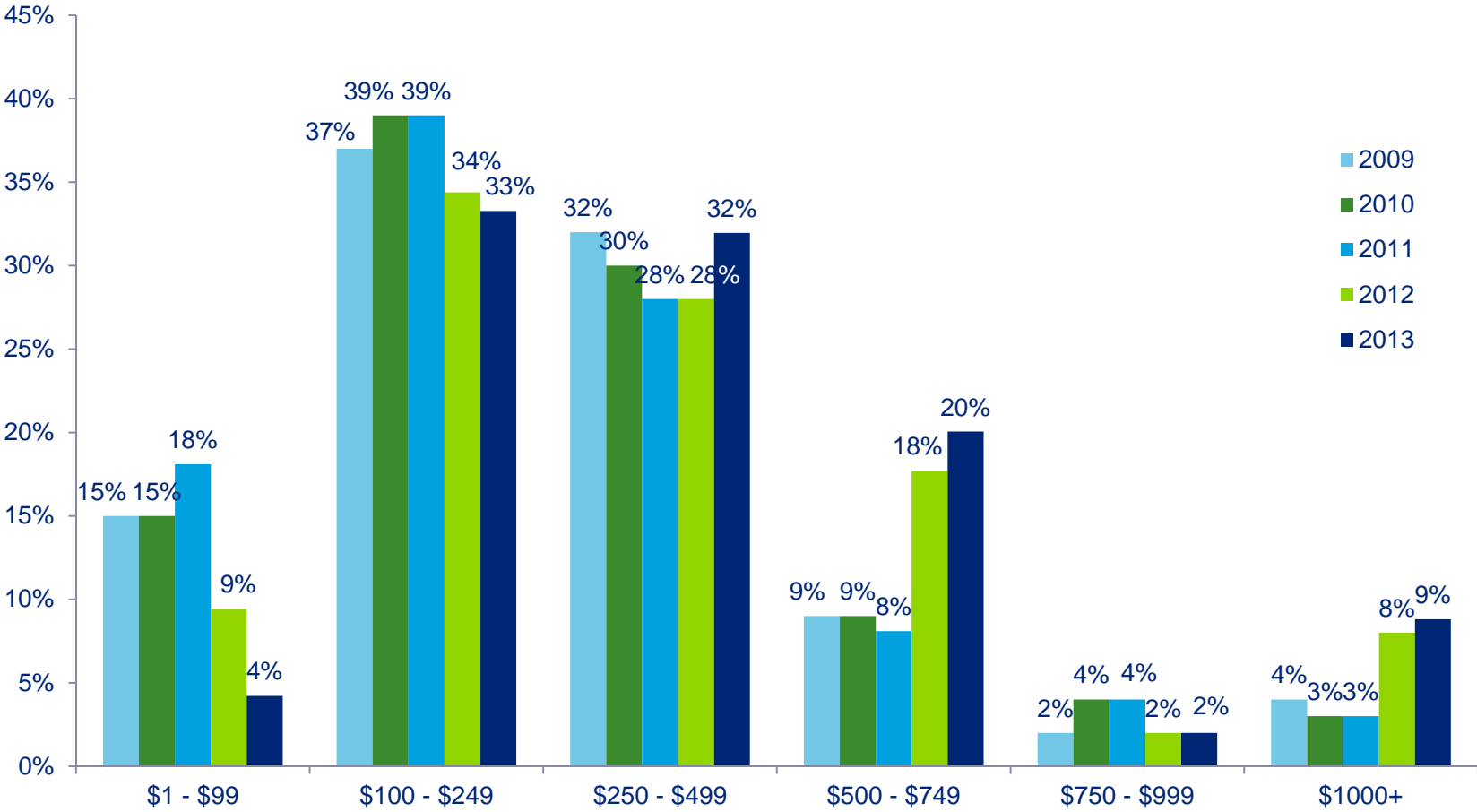
\*No 2009 data available for the “Office supply/technology stores” category

# Top 5 sources of information on back-to-school items; online takes over 'traditional' sources among parents

“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 3 respondents (31%) expect to spend \$500+ on back-to-school items

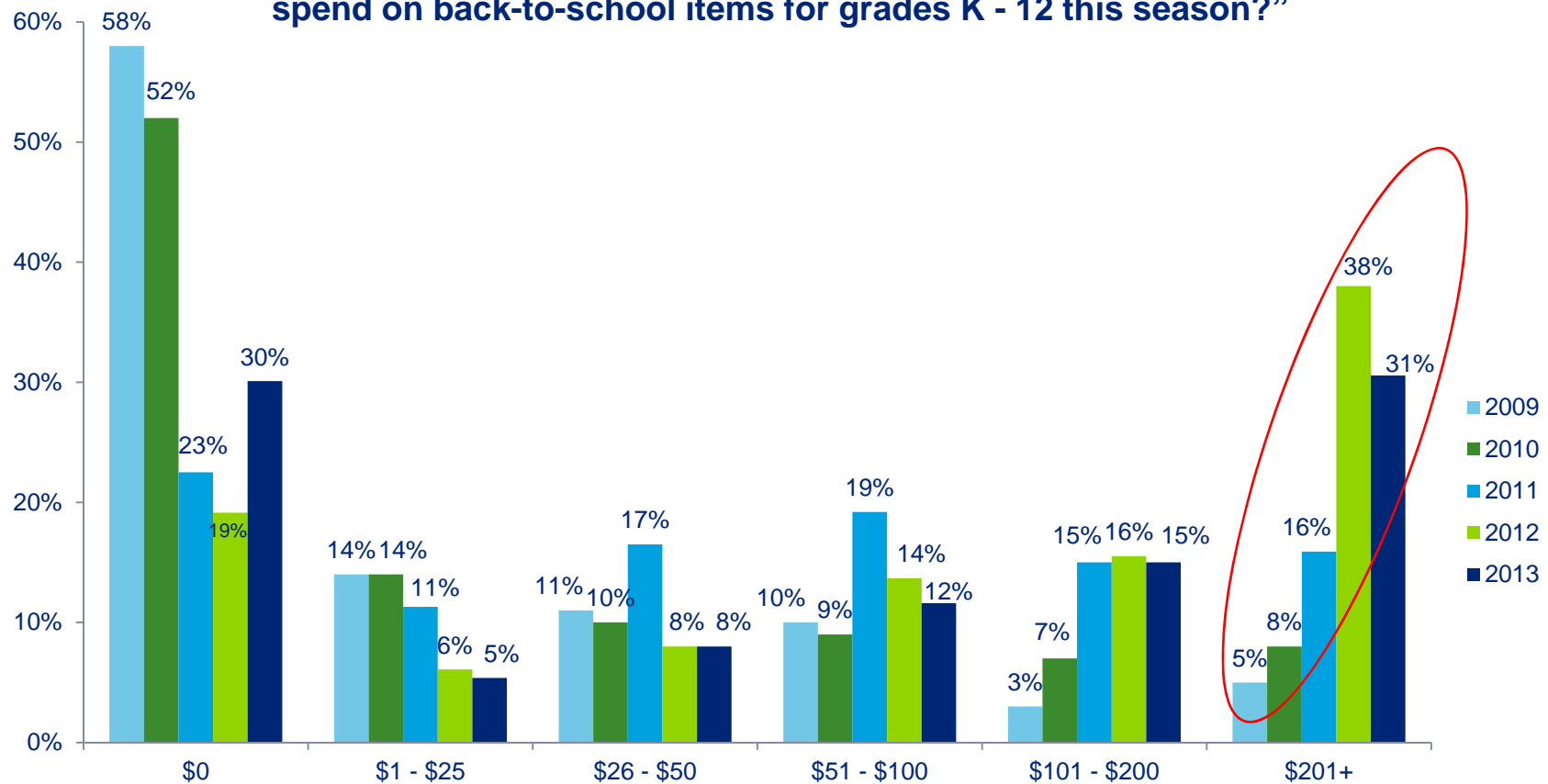


**Respondents expect to spend on average \$428 this back-to-school season**



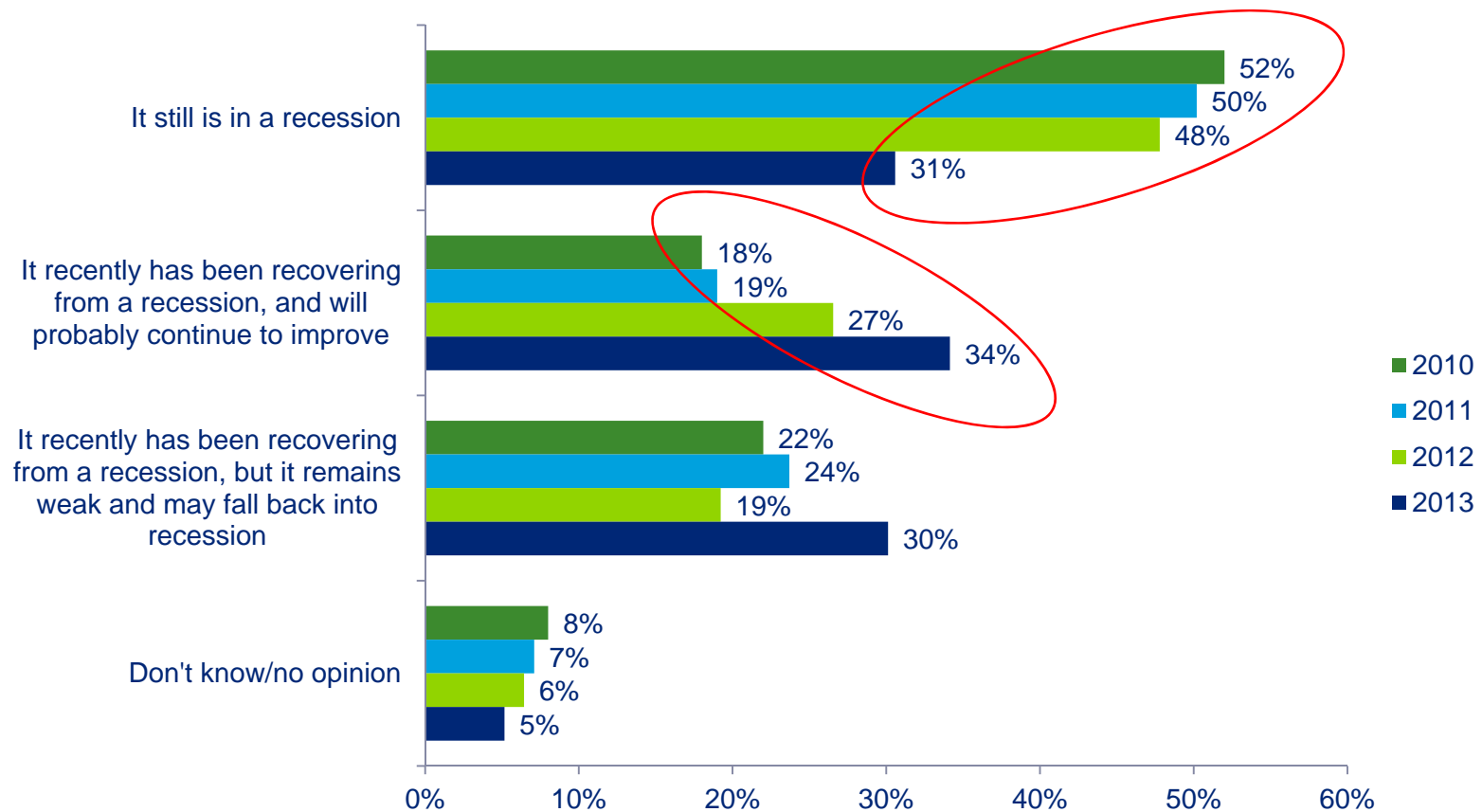
# Nearly 1 in 3 respondents (31%) indicated that their children plan to spend \$201+ on back-to-school items

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



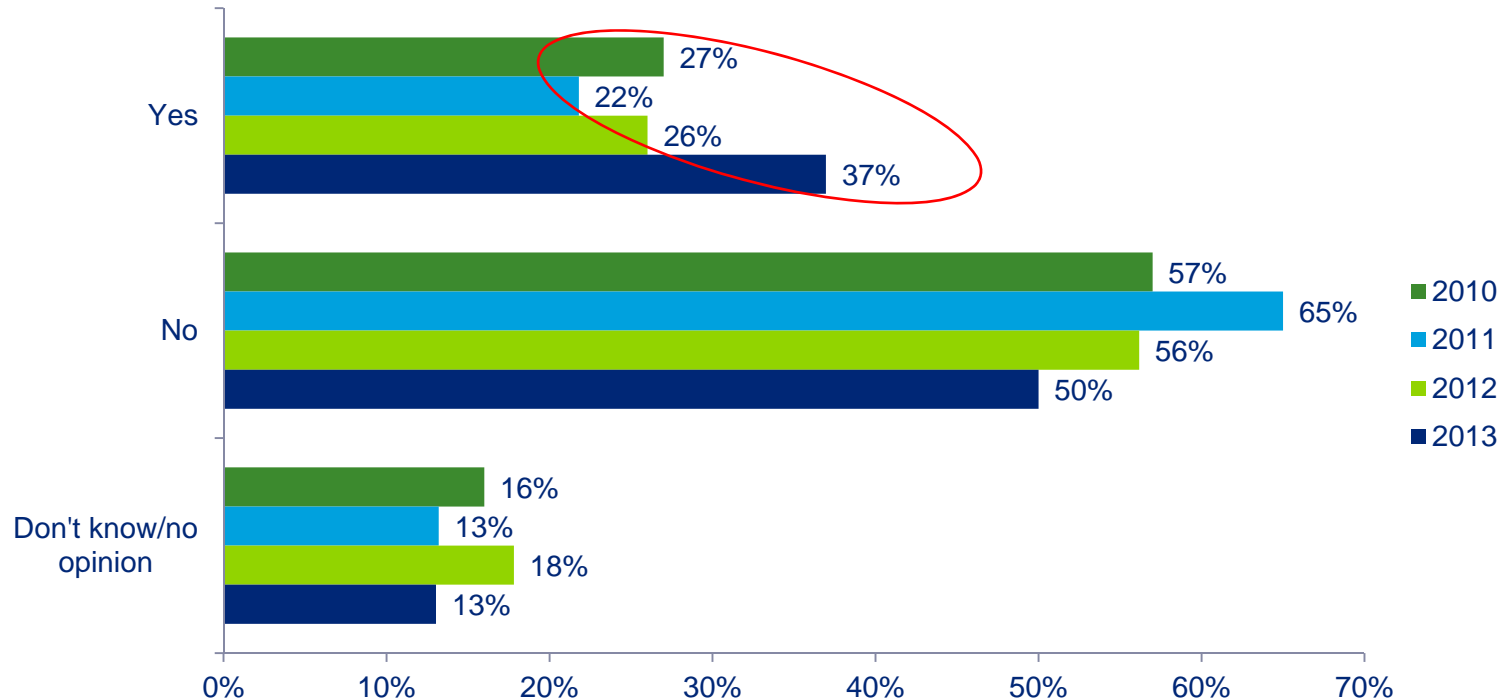
# 1 in 3 respondents (34%) think the U.S. economy is recovering from a recession and will continue to improve

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

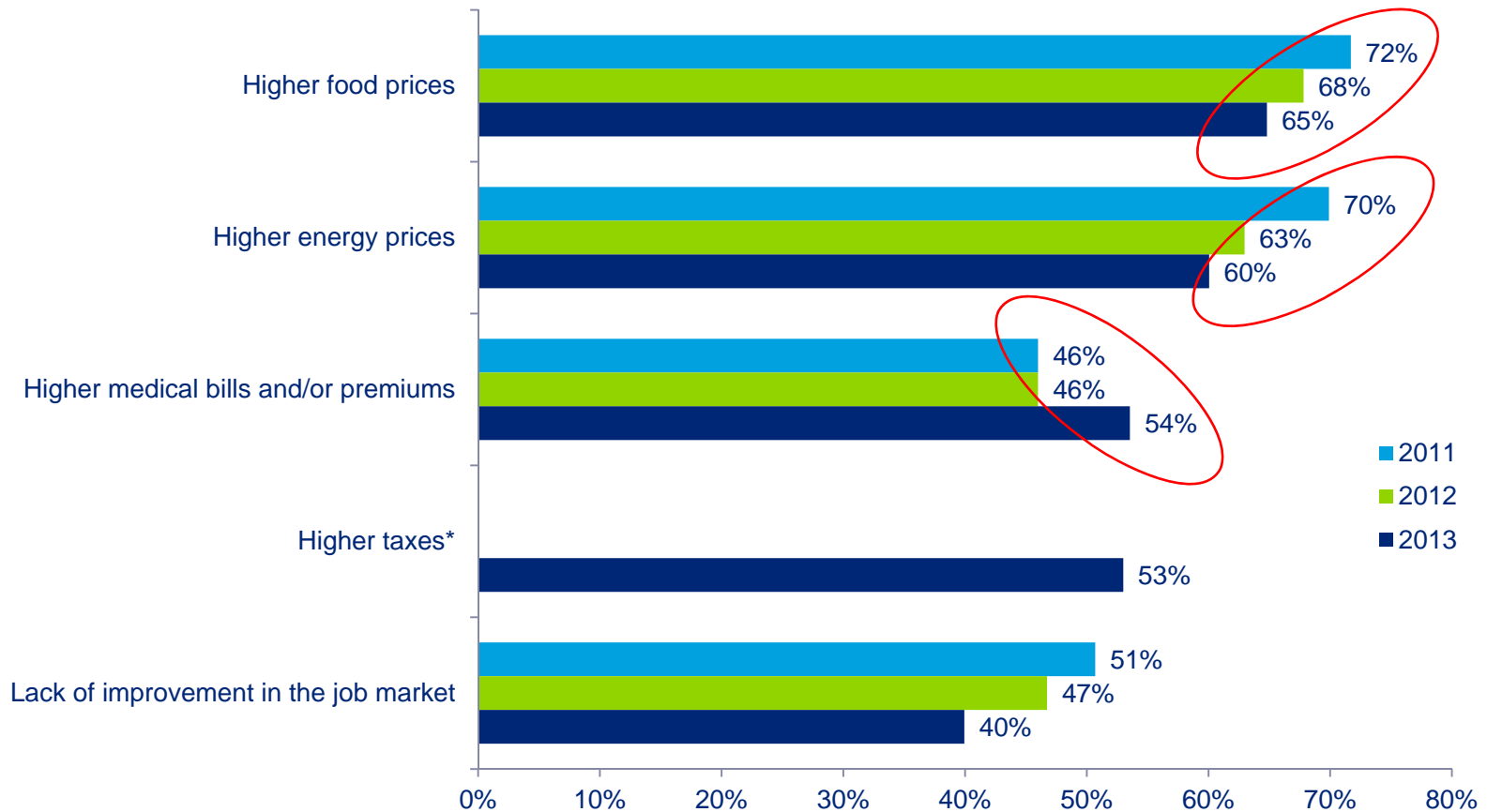


# Respondents are more optimistic about the U.S. economy in 2013 than in the previous years.

“Are you more confident about the U.S. economy’s prospects now (July 2013), than you were at the end of 2012?”



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



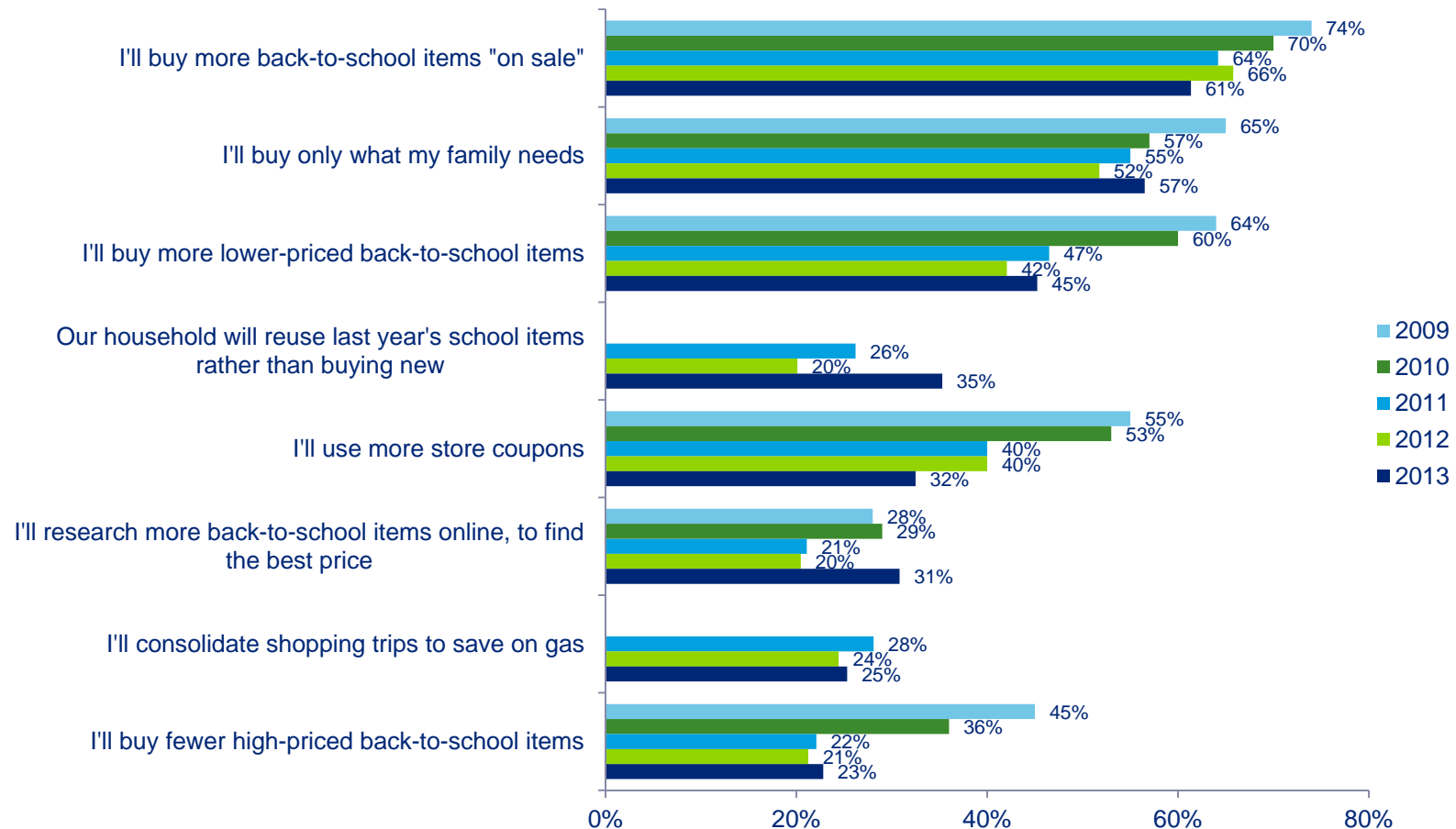
\*No 2011 or 2012 data available for the "Higher taxes" category

Source: Deloitte's 2013 Back-to-School Survey

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# Ways that respondents think their shopping behavior will change as compared with last year

“How are you likely to change the way you shop for back-to-school items this season, as compared with last year because of concerns about the U.S. economy?”



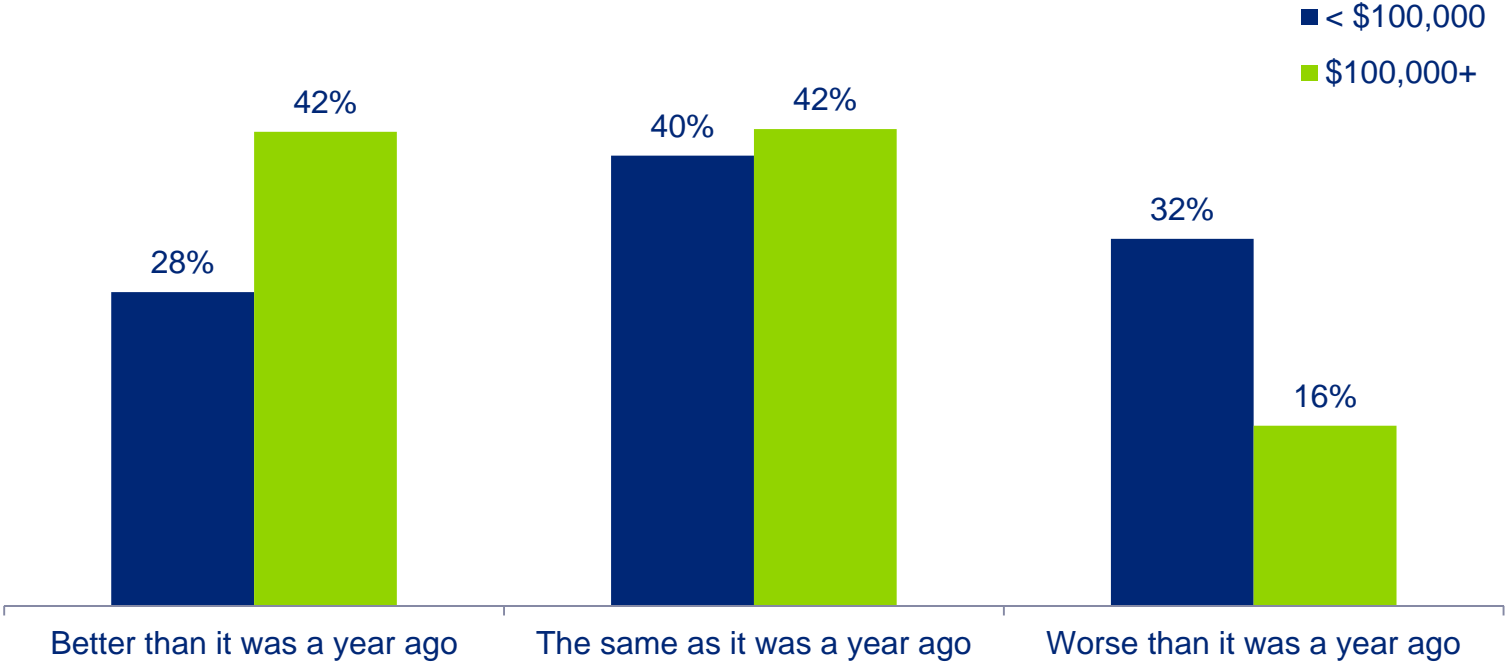
\* Only top 8 behavioral responses are shown in the chart

Source: Deloitte's 2013 Back-to-School Survey

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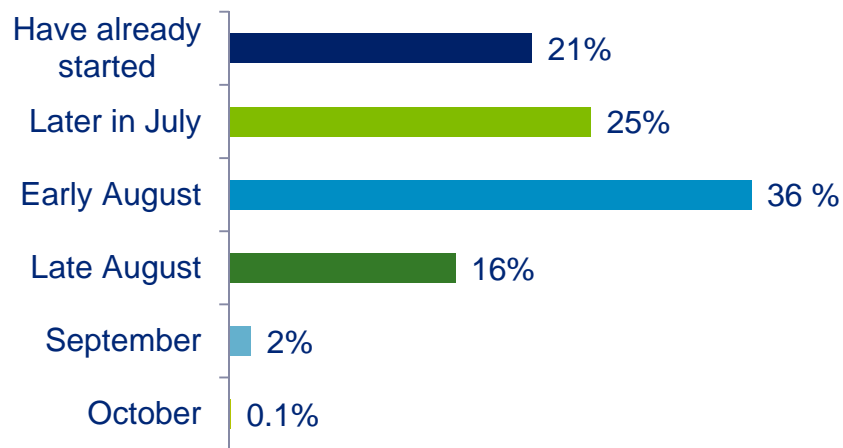
# 84% of respondents earning \$100,000+ say their financial situation is the same or better than last year at this time

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

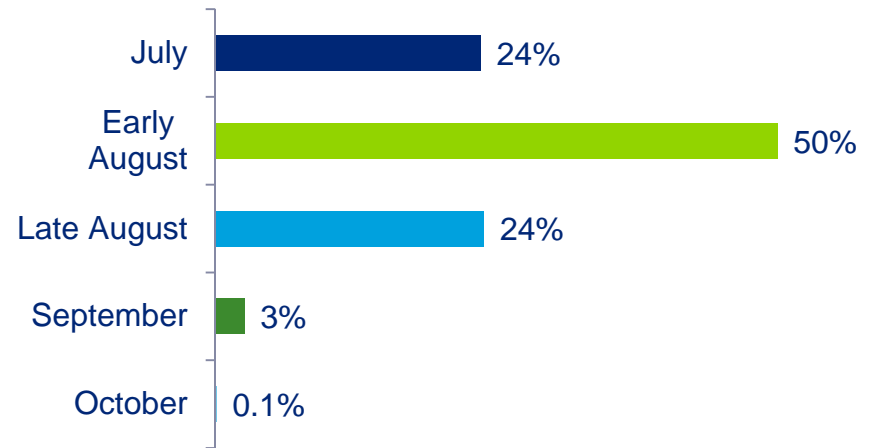


# Respondents indicate that early August is when back-to-school shopping is most likely to start and when most of it is likely to get done

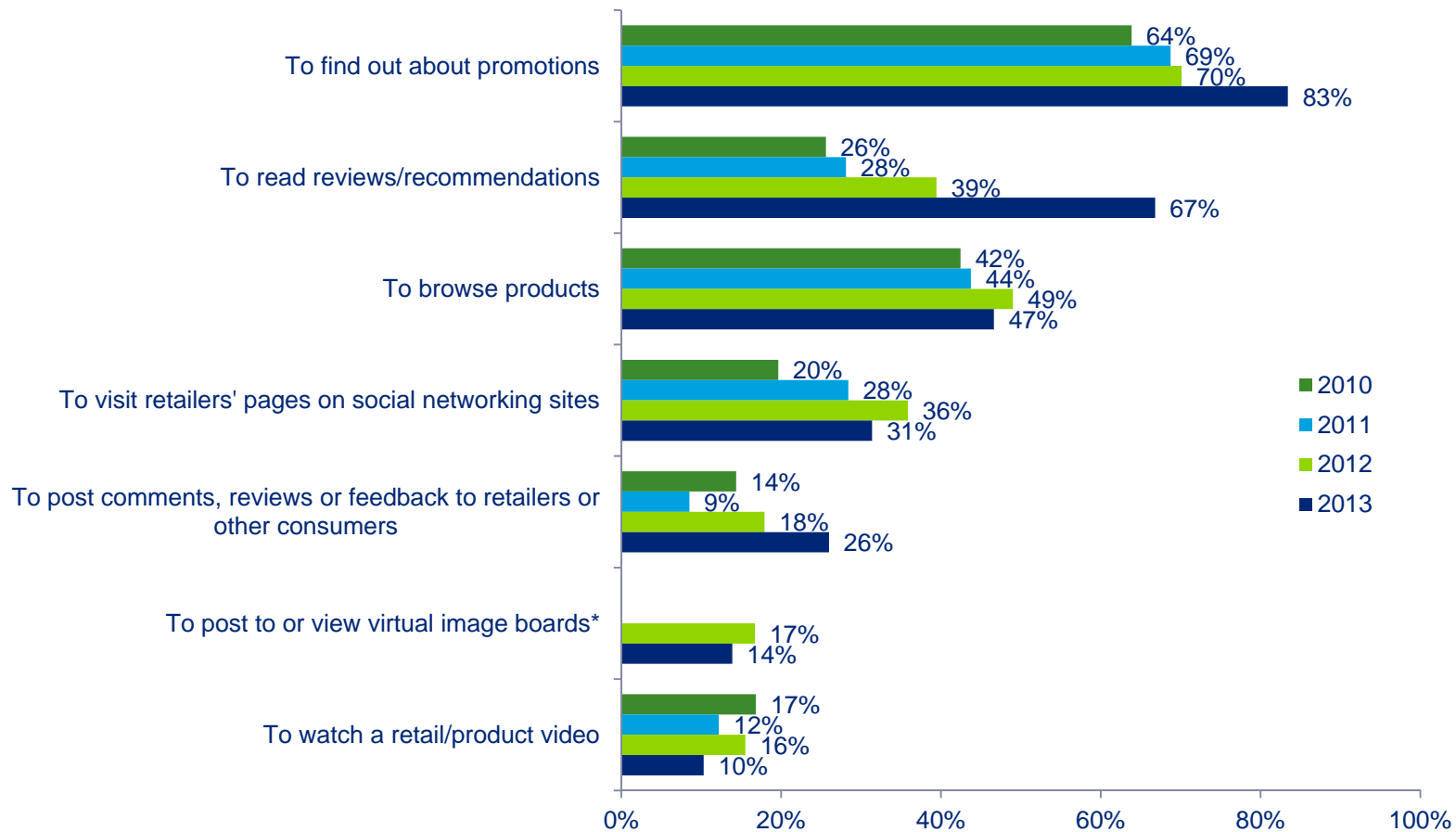
“When will you likely begin your back-to-school shopping?”



“When are you likely to do the majority of your back-to-school shopping?”



# 1 in 5 (21%) respondents plans to use social media sites in their back-to-school shopping. Among those respondents, they'll use them to ...



\*New answer choice in 2012; no data available for prior years

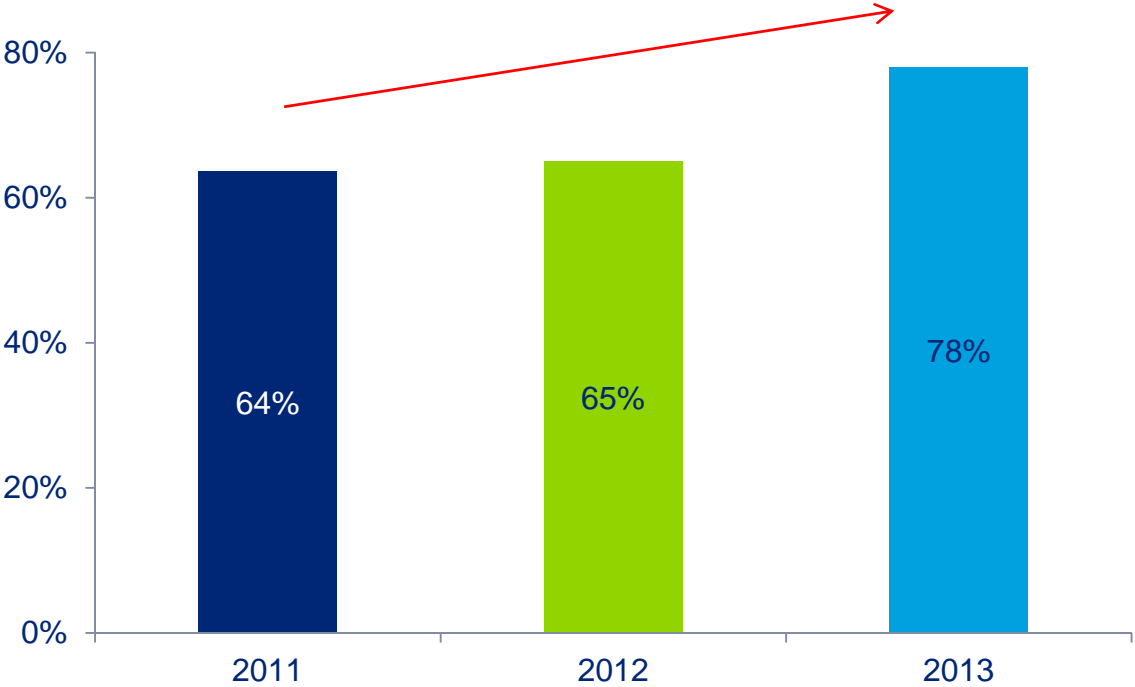
Source: Deloitte's 2013 Back-to-School Survey

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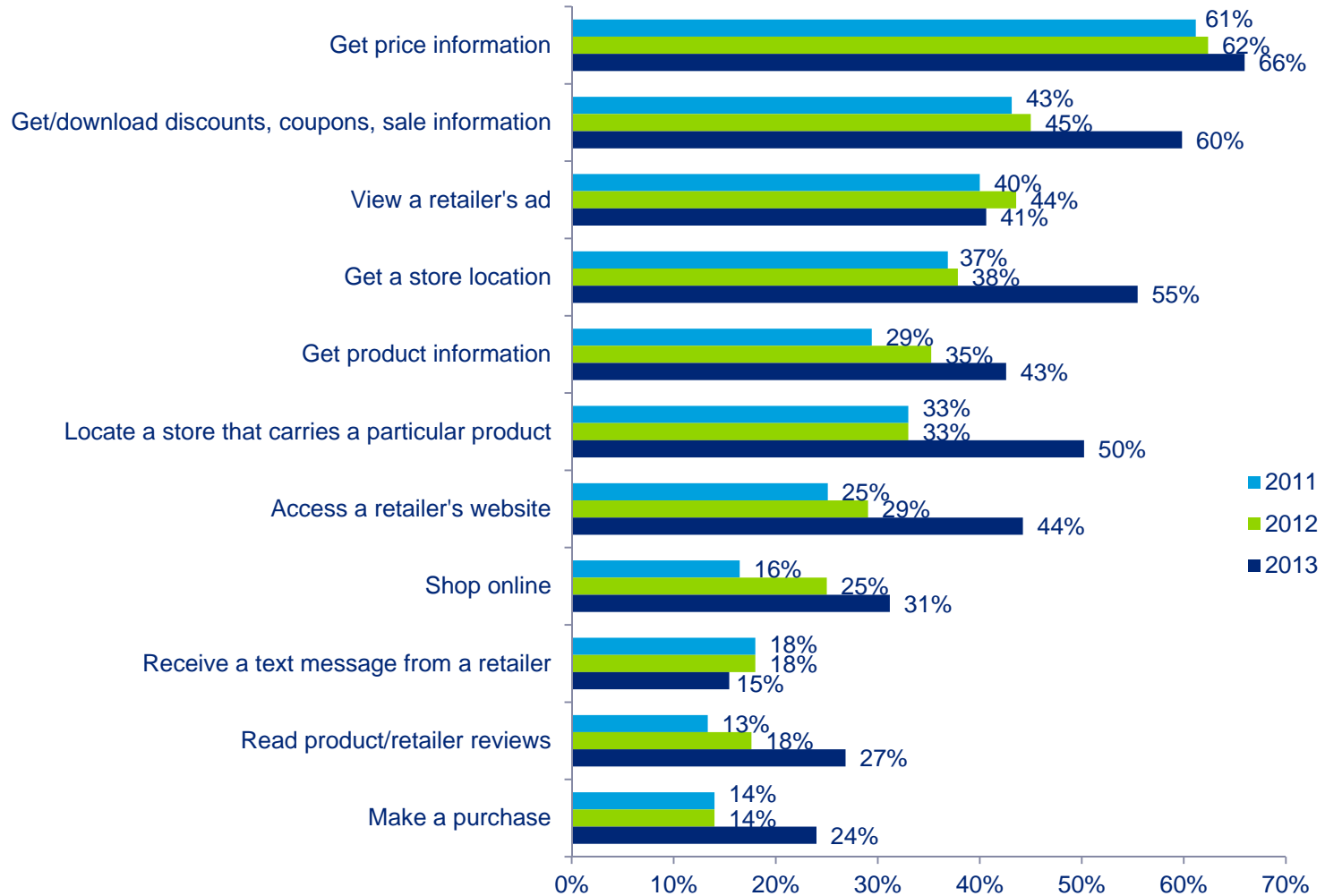
# Among smartphone owners, nearly 4 in 5 respondents (78%) plan to use their device to assist with back-to-school shopping

% who plan to use Web-enabled smart phones to assist in back-to-school shopping



Base: Only those who own Web-enabled smart phones

# Of those respondents planning to use Web-enabled smart phones to assist in their back-to-school shopping, they'll use them to:



# 2013 Back-to-College Survey

**Conducted July 5-10, 2013**

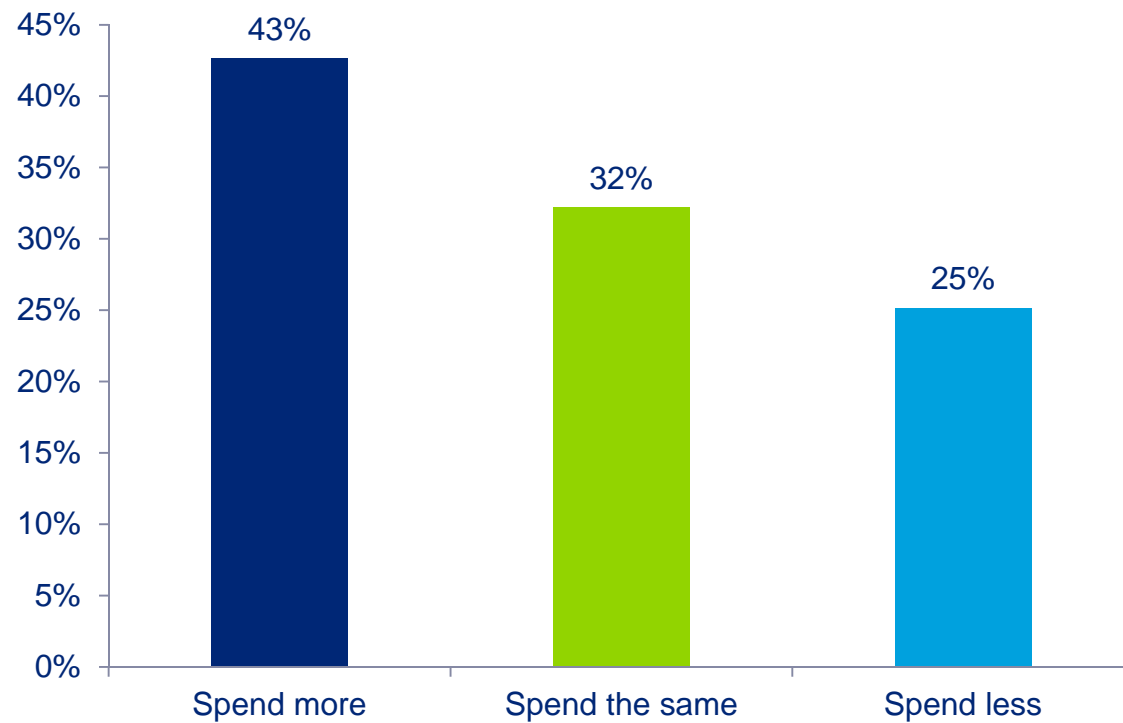
**450 responses**

## About the survey

The survey was commissioned by Deloitte and conducted online by an independent research company between July 5 and 10, 2013. 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.

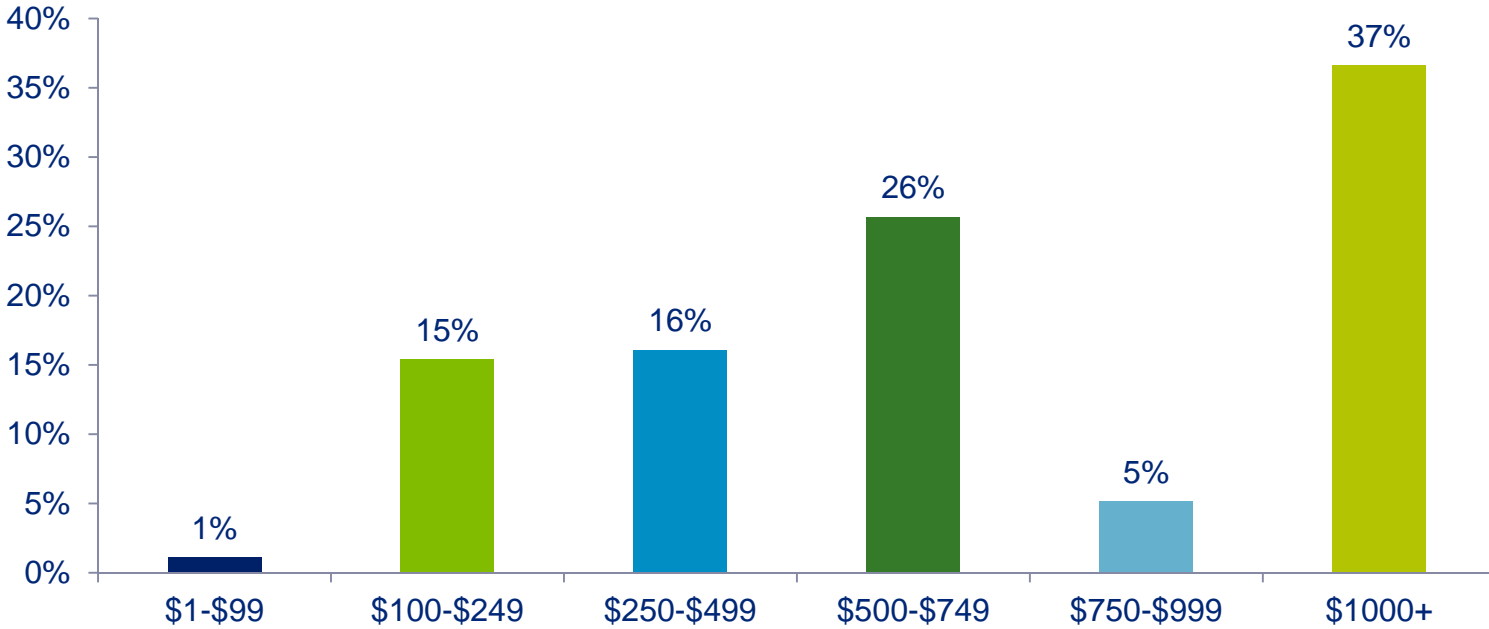
All respondents had at least one child attending college this fall.

## 3 in 4 respondents (75%) indicated they expect to spend more or the same on back-to-college items when compared to last year



# Nearly 2 in 5 respondents (37%) expect to spend \$1,000+ on back-to-college items

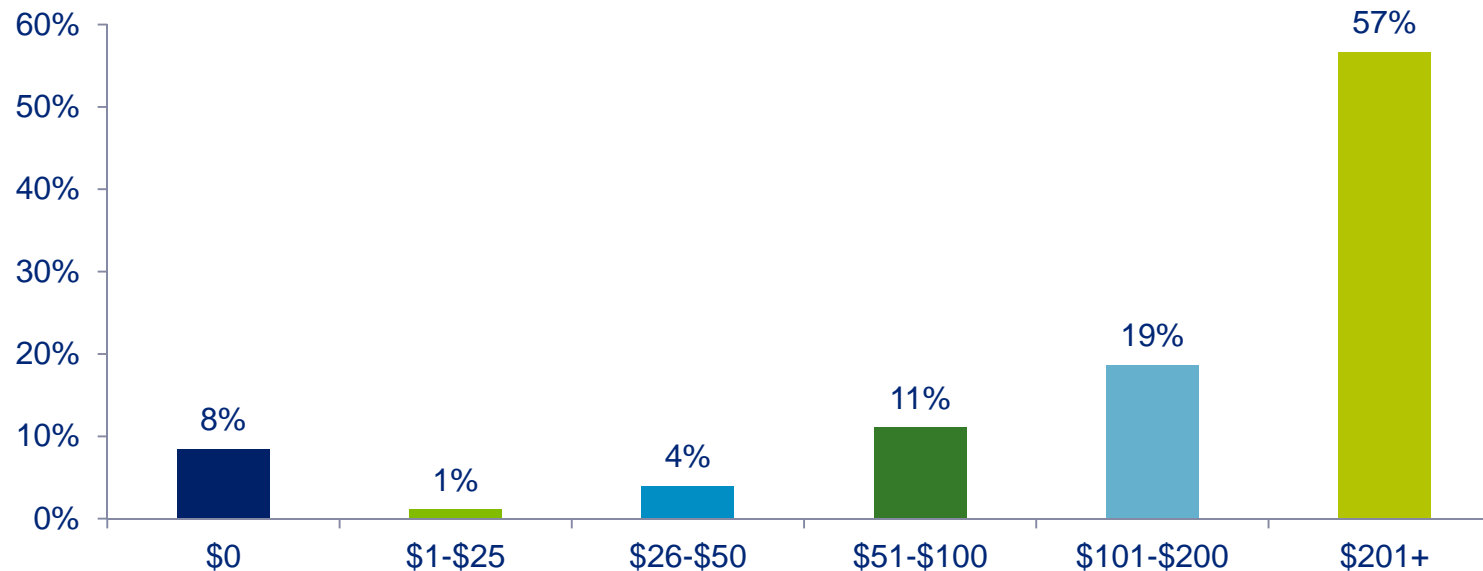
“What is the total amount you expect to spend on back-to-college items this season?”



**Parents expect to spend on average \$907 on back-to-college items this season**

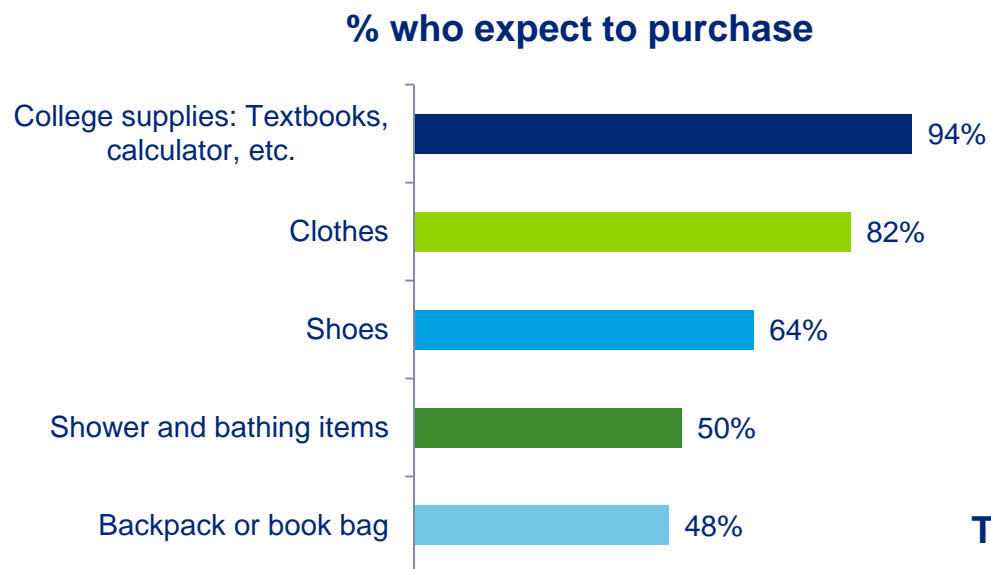
## Nearly 3 in 5 respondents (57%) indicated that their children plan to spend \$201+ on back-to-college items

“What is the total amount you expect your children will spend on back-to-college items this season?”

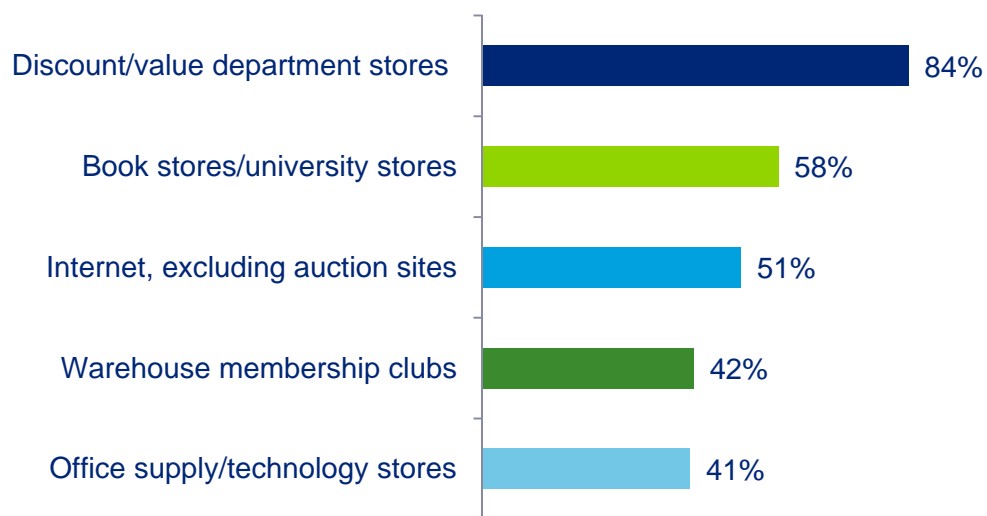


**Parents expect their children to spend on average \$453 on back-to-college items this season**

# Top items most in demand and top shopping destinations this back-to-college season



## Top retail shopping environments



\* Top 5 rankings are listed for both charts

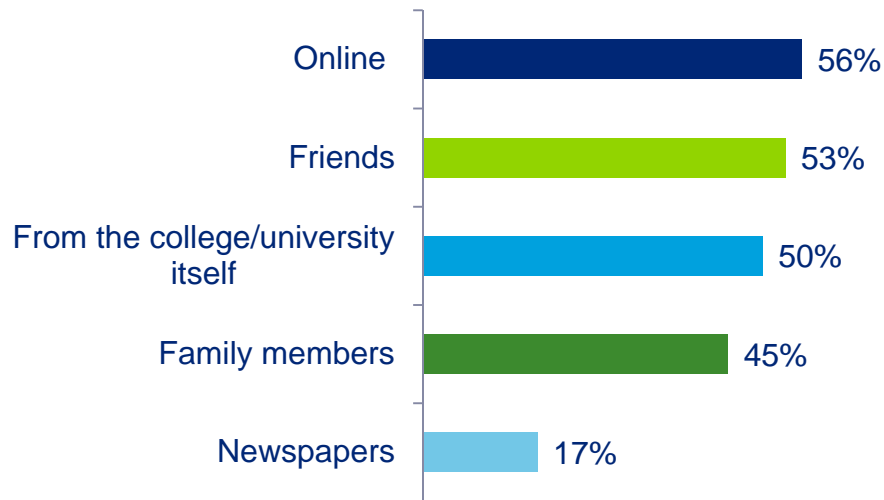
Source: Deloitte's 2013 Back-to-College Survey



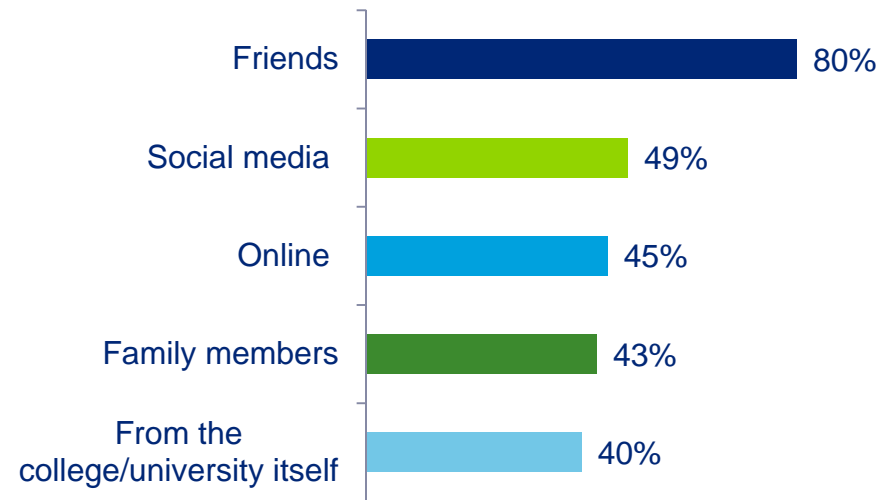
# Top 5 sources of back-to-college shopping advice

Where are you and your children most likely to get back-to-college shopping advice?

## Parent

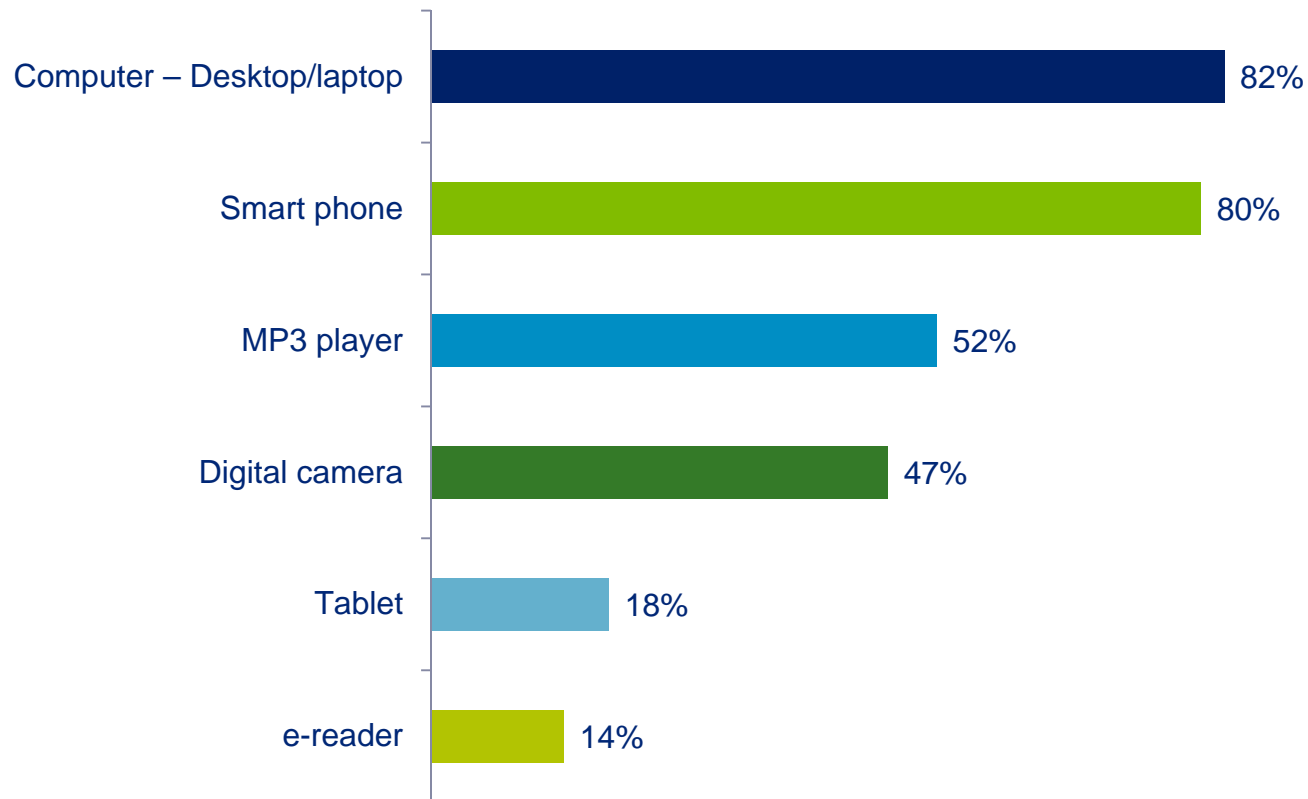


## Child

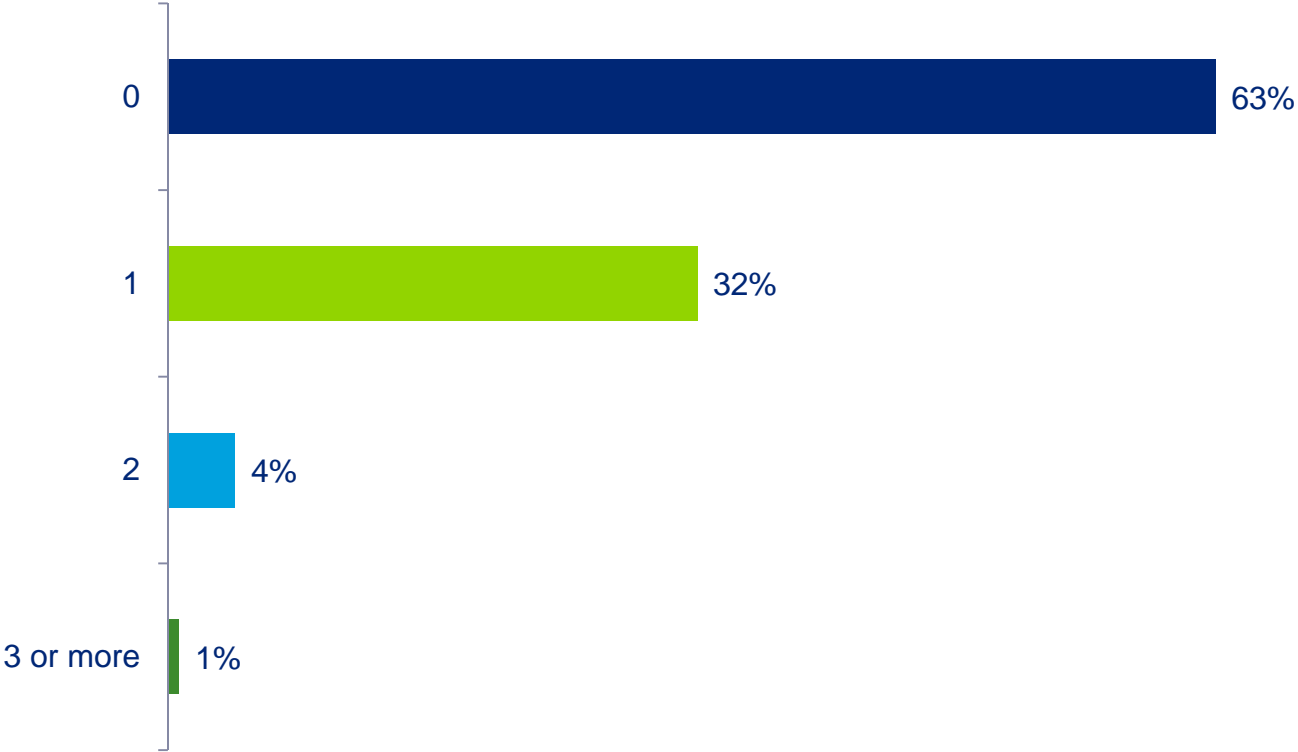


# Computers, smart phones, and MP3 players rank as the most popular electronic devices owned by college students

Electronic device ownership by college students

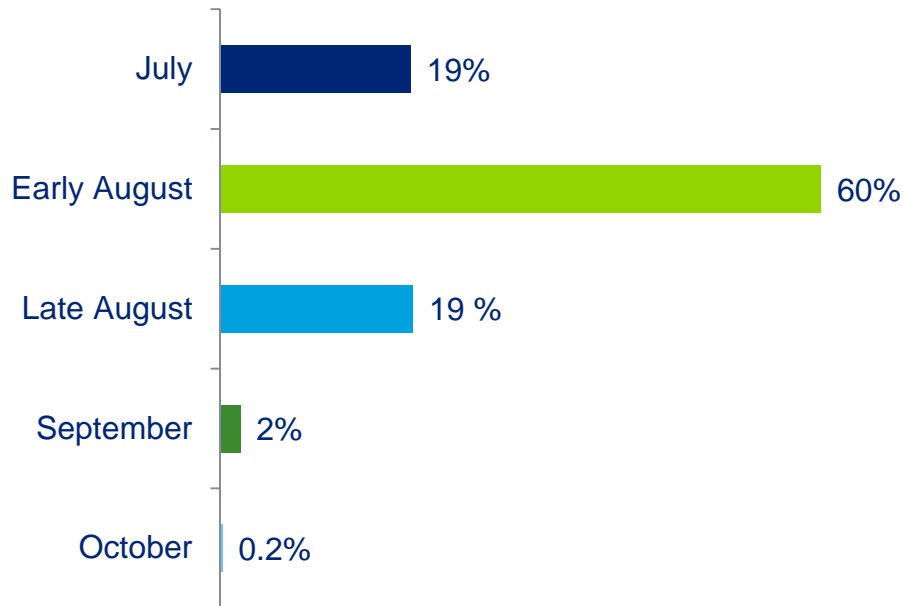


# Nearly 2 in 5 respondents (37%) indicated that their college student owns at least 1 or more credit cards

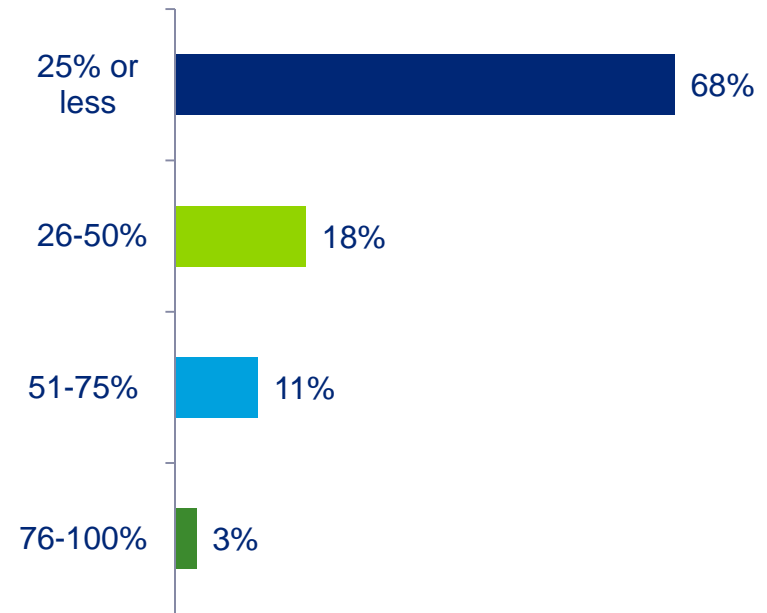


# Respondents intend to do most of their shopping in early August; more than two-thirds (68%) have only completed 25% or less of their shopping

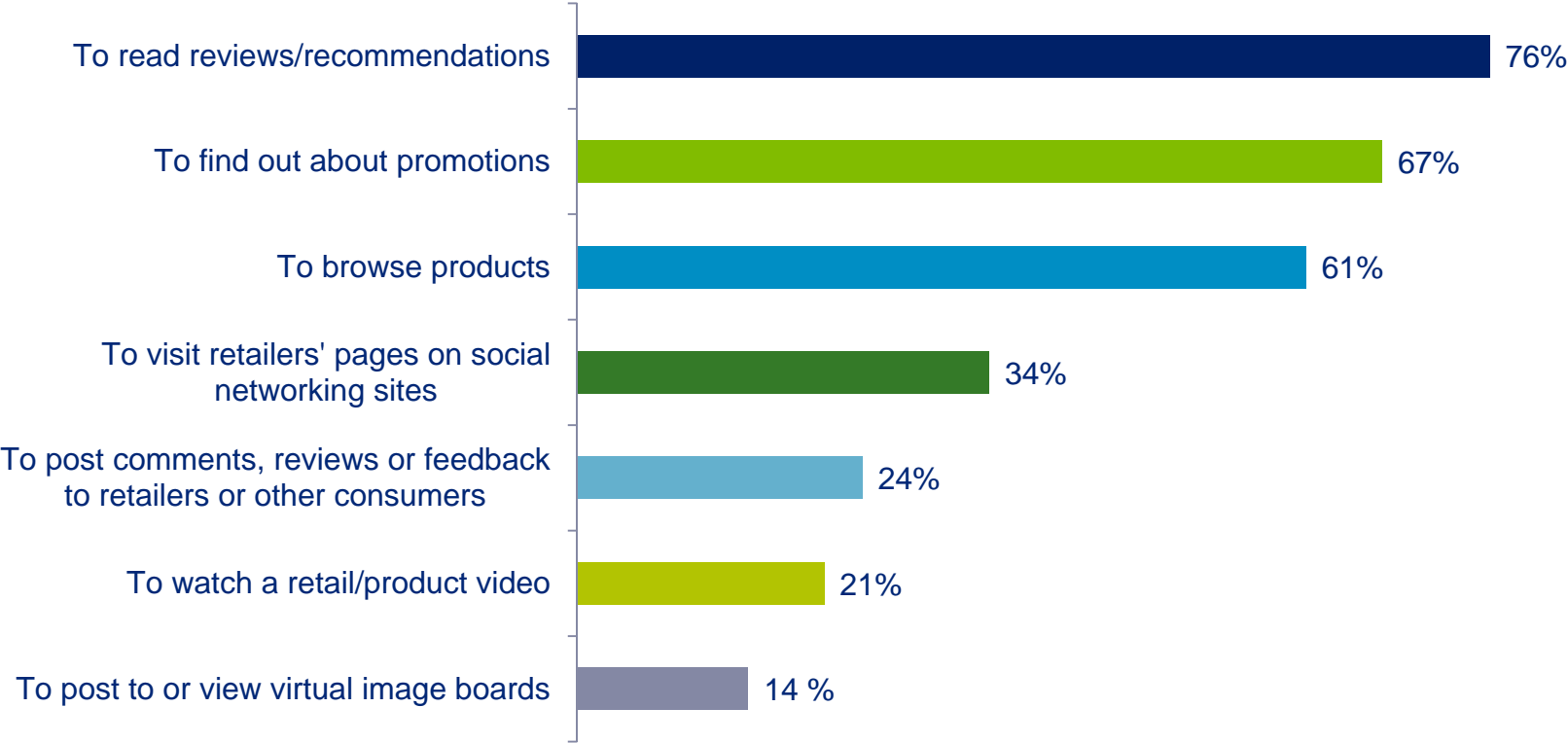
“When are you likely to do the majority of your back-to-college shopping?”



“How much of your back-to-college shopping have you completed?”



# More than 2 in 5 (43%) households plan to use social media sites in their back-to-college shopping. Among those respondents, they'll use them to ...



## Survey respondents are using many different strategies to save money when back-to-college shopping

**88%**

**My college student will buy more used textbooks or textbook rentals to help stretch his/her back-to-college spending budget**

**81%**

**I will seek more discounts, coupons, and deals when back-to-college shopping this season**

**73%**

**I will purchase more items online to find the best prices this back-to-college shopping season**

**52%**

**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**

**47%**

**I will use my mobile or smart phone device while in the store to comparison shop and find the best prices this back-to-college season**

\* Percentages indicate respondents that selected both “agree” and “somewhat agree” to the statements provided



The statements in this report reflect our analysis of survey respondents and are not intended to reflect facts or opinions of any other entities. All survey data and statistics referenced and presented, as well as the representations made and opinions expressed, unless specifically described otherwise, pertain only to participants and their responses to the Deloitte survey.

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