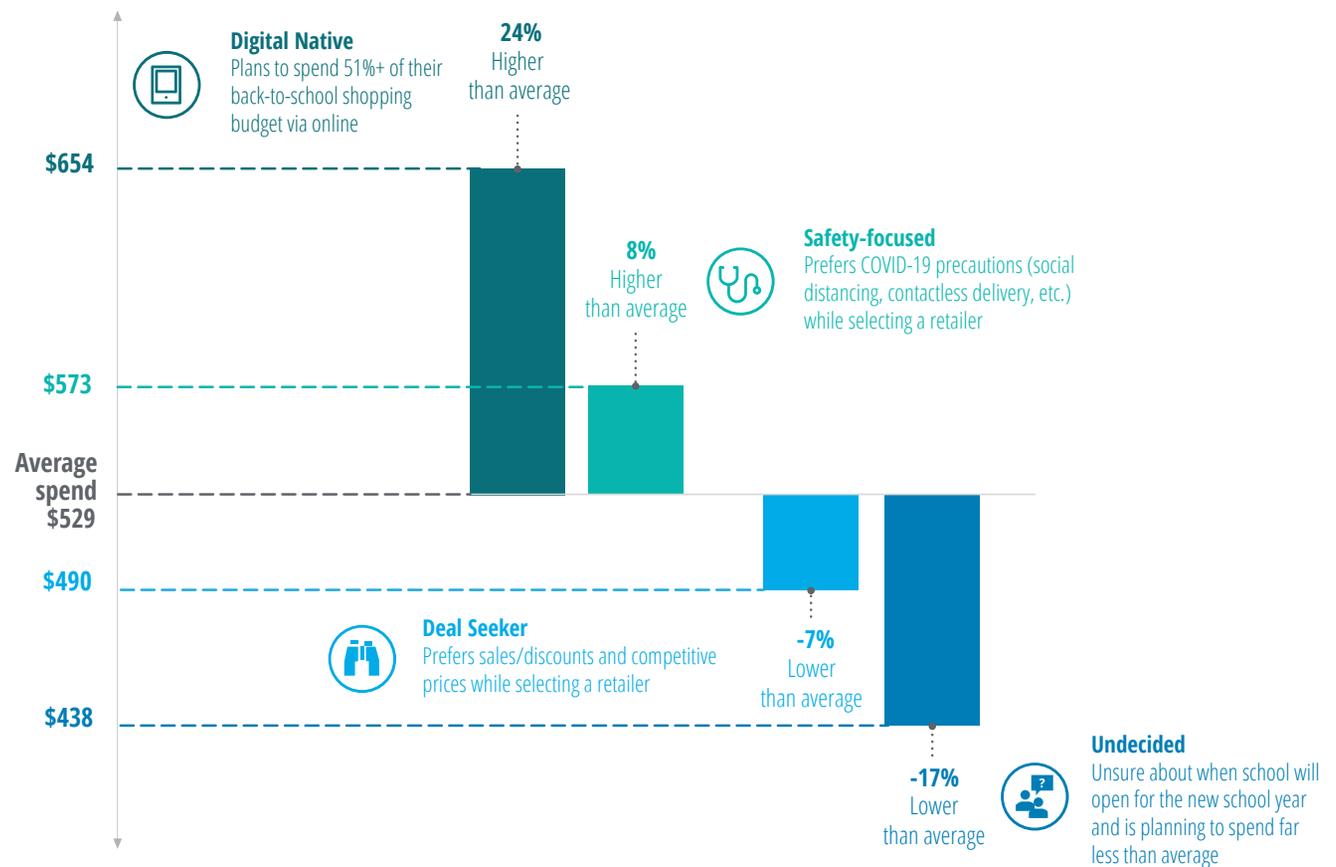


DELOITTE'S RECENT SURVEY of 1,200 back-to-school shoppers in the United States confirms they are uncertain and anxious, and have fairly low satisfaction levels with the education their kids received this spring. Analysis reveals four types of shoppers are approaching the season—the Digital Native, the Safety-focused, the Undecided, and the Deal Seeker (see figure). Understanding these shoppers' approaches can help retailers identify what matters most and what drives hundreds of dollars of spend per family. By acting on this knowledge, retailers can optimize digital platforms, implement strong COVID-19 precautions, and address the nuances of each type of shopper.

The Digital Native, you had them at free shipping

Retailers that can offer convenience platforms can gain ground with this group, as **68%** prefer the **buy-online-return-in-store** format (vs. 48% average). Interestingly, this group doesn't want to pay up for

Expected back-to-school spend: The Digital Native leads the pack, but opportunities are to be had with other shoppers too



Note: All amounts are given in US dollars.

Source: Analysis of the 2020 Deloitte back-to-school survey data.

Know your back-to-school consumer

delivery—**56%** prefer retailers that offer **free shipping** (vs. 39% average). This segment is also more comfortable with using virtual and online learning resources for their children, with **59%** planning to spend the same or more than last year (vs. 49% average) to help supplement children's educations.

The Safety-focused, the social-distancing shopper

Concerns for health drive **51% to visit an online-only retailer** for back-to-school shopping (vs. 40% average) and **57%** prefer retailers that offer **buy-online-pick-up-in-store or curbside pickup** (vs. 42% average). Furthermore, their children's safety is also top of mind with **69%** planning to buy personal hygiene products, such as hand sanitizer and wipes (vs. 54% average). To tap into this group's higher-than-average budget, retailers should focus on COVID-19 safety precautions and contactless platforms.

The Deal Seeker, bargain hunting all summer long

Given their value-seeking trait, 43% of Deal Seekers plan to visit **off-price retailers** for back-to-school shopping (vs. 30% average). Retailers should consider frequent promotions to entice this group, as **66%** plan **to shop at different points in the summer for the best deals** (vs. 56% average).

The Undecided, waiting to see when and how school will open

This group has yet to decide on their shopping plans and **29%** of their back-to-school **budget is not aligned to any retail channel** (vs. 17% average). They are also **late shoppers**, with **52%** planning to start shopping in August or later (vs. 37% average). Retailers that can avoid stock-outs late in the season will likely have an opportunity to engage with these consumers.

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