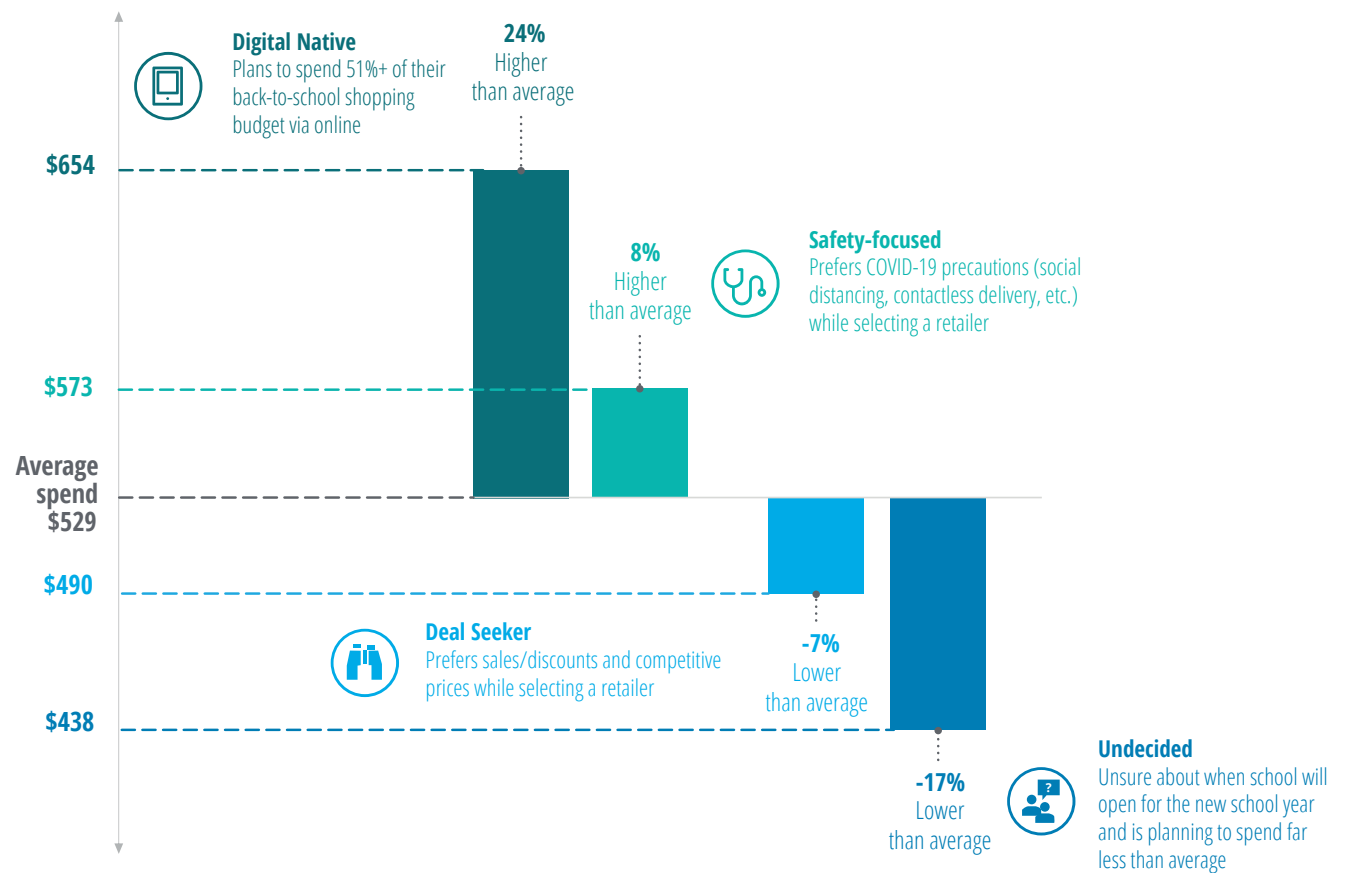


**D**ELOITTE'S RECENT SURVEY of 1,200 back-to-school shoppers in the United States confirms they are uncertain and anxious, and have fairly low satisfaction levels with the education their kids received this spring. Analysis reveals four types of shoppers are approaching the season—the Digital Native, 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.

## Acknowledgments

The authors would like to thank **Bryan Furman, Arun Tom, and Venkata Sangadi** for their contributions to this article.

## About the authors

**RODNEY R. SIDES** is vice-chairman with Deloitte LLP and leads the US Retail & Distribution practice. He is responsible for driving key sector initiatives that include original research, talent development, and strategies that guide retailers as they navigate uncertainty, compete globally, and improve performance and profitability. Sides has more than 25 years of experience in store operations, supply chain, procurement, back-office operations, and IT.

**LUPINE SKELLY** is a manager at Deloitte Services LP’s Consumer Industry Center and leads research for the Retail, Wholesale & Distribution sector. With more than 15 years of retail market research experience, Skelly uses her expertise to uncover actionable insights around emerging trends across the retail industry. In addition, her research focuses on consumer behavior and how it relates to key retail events, such as back to school and holiday.

## About the Deloitte Center for Industry Insights

The Deloitte Center for Industry Insights provides premiere insights based on primary research on the most prevalent issues facing the consumer business and manufacturing industries—ranging from aerospace to retail—to help your business run effectively and achieve superior business results.

## Contacts

### Industry leadership

#### **Rodney R. Sides**

Vice-chairman and US leader | Retail & Distribution  
Principal | Deloitte Consulting LLP  
+1 704 887 1505  
rsides@deloitte.com

#### **Lupine Skelly**

Retail, Wholesale & Distribution Research leader  
Manager | Deloitte Services LP  
+1 206 716 7187  
lskelly@deloitte.com

### The Deloitte Consumer Industry Center

#### **Stephen Rogers**

Executive director | Consumer Industry center | Deloitte Services LP  
+1 203 563 2378 | stephenrogers@deloitte.com

# Deloitte.

## Insights

Sign up for Deloitte Insights updates at [www.deloitte.com/insights](http://www.deloitte.com/insights).

 Follow @DeloitteInsight

### Contributors

**Editorial:** Kavita Saini, Preetha Devan, and Nairita Gangopadhyay

**Creative:** Sanaa Saifi

**Promotion:** Nikita Garia

### About Deloitte Insights

Deloitte Insights publishes original articles, reports and periodicals that provide insights for businesses, the public sector and NGOs. Our goal is to draw upon research and experience from throughout our professional services organization, and that of coauthors in academia and business, to advance the conversation on a broad spectrum of topics of interest to executives and government leaders.

Deloitte Insights is an imprint of Deloitte Development LLC.

### About this publication

This publication contains general information only, and none of Deloitte Touche Tohmatsu Limited, its member firms, or its and their affiliates are, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your finances or your business. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

None of Deloitte Touche Tohmatsu Limited, its member firms, or its and their respective affiliates shall be responsible for any loss whatsoever sustained by any person who relies on this publication.

### About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as “Deloitte Global”) does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the “Deloitte” name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more about our global network of member firms.