

Accenture Back-to-School Shopping Survey 2014

Key Findings



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Survey Methodology and Demographics

Accenture conducted an online survey among a representative sample of 500 U.S. parents of children entering kindergarten through college (undergraduate degrees). The survey was conducted between June 25 and June 30, 2014.

Gender of Parents	n=500
Male	173
Female	327

Age of Parents	n=500
18-34	161
35-44	160
45-54	124
55+	55

Number of Children Per Parent	n=500 (parents)
1 Child	230
2 Children	180
3 Children	61
4 Children	21
5 or More Children	8

Number of Children Per Grade	n=897 (students)
Kindergarten - 5th Grades	292
6th - 8th Grades	194
9th - 12th Grades	257
College	154

Executive Summary

The 2014 Accenture Back-to-School Shopping Survey surveyed parents of children entering kindergarten through college (undergraduate degrees) to understand their spending plans:

- Two-thirds of parents (67 percent) plan to spend between \$100 and \$500 and 41 percent plan to spend \$500 or more for back-to-school shopping this year.
- Compared to last year, just over half of the parents (52 percent) said they will spend more on back-to-school shopping than last year, 37 percent plan to spend the same and only 11 percent expect to spend less.
- One-third (33 percent) of parents spending more plan to increase their spending by \$250 or more. Among the reasons given for the spending increase were higher prices and increased school requirements. Nearly one in five parents (19 percent) said they will spend more in order to help their children “keep up with their friends.”
- While 89 percent of parents plan to do “most” of their back-to-school shopping in a physical store, the survey results demonstrate the growing importance of the seamless shopping experience. Nearly eight out of 10 (79 percent) plan to participate in “webrooming” – browsing online and then going to a store to make their purchase.
- The top reasons respondents cited for webrooming were: to check if an item is in stock before going to a store to make a purchase (47 percent); to touch and feel the product before buying (43 percent); to avoid shipping costs (43 percent); and to ask the store to match a better price found online (33 percent).
- The survey also shows that while parents carry the wallet, their children carry purchasing power: more than half of parents (54 percent) said their children influence 50 percent or more of the back-to-school shopping decisions.
- At the same time, survey results indicate that 33 percent of children will be spending some of their own money for back-to-school shopping – \$266 on average for college students and \$128 on average for K-12 students.

Executive Summary (continued)

Spending on College Students Driving Increase

- The parents of college children expect their spending increases to be higher than the parents of younger children: 28 percent of parents of college students believe they will spend \$500 or more than last year compared to only six percent of parents of K-5 students.
- Among parents expecting to spend less this year, 58 percent plan to decrease spending by \$100 or less than last year. More than half (55 percent) of these parents said they will reduce their spending because they have less discretionary income and 28 percent say they will reduce spending because of higher living costs.

Discount Retailers Rule Back-to-School

- Discount / mass retailers are the number-one shopping destination by far for back-to-school shopping (90 percent), followed by office supply stores (63 percent) and department stores (49 percent).
- Pricing, quality of items and a broad selection to get all or most items at one store are the most important factors for parents when choosing a retailer for back-to-school. Offerings such as loyalty programs, flexible returns and price-matching ranked much lower on the back-to-school shopping priority list.

The Back-to-School Shopping List

- The top items on back-to-school shopping lists this year are: general school supplies (88 percent), clothing and shoes (87 percent), accessories such as backpacks (71 percent) and computers, tablets, phones, gadgets and electronics (60 percent). Food and grocery spending also rang in at 41 percent and big-ticket furniture, mainly for college students, at 13 percent.

Executive Summary (continued)

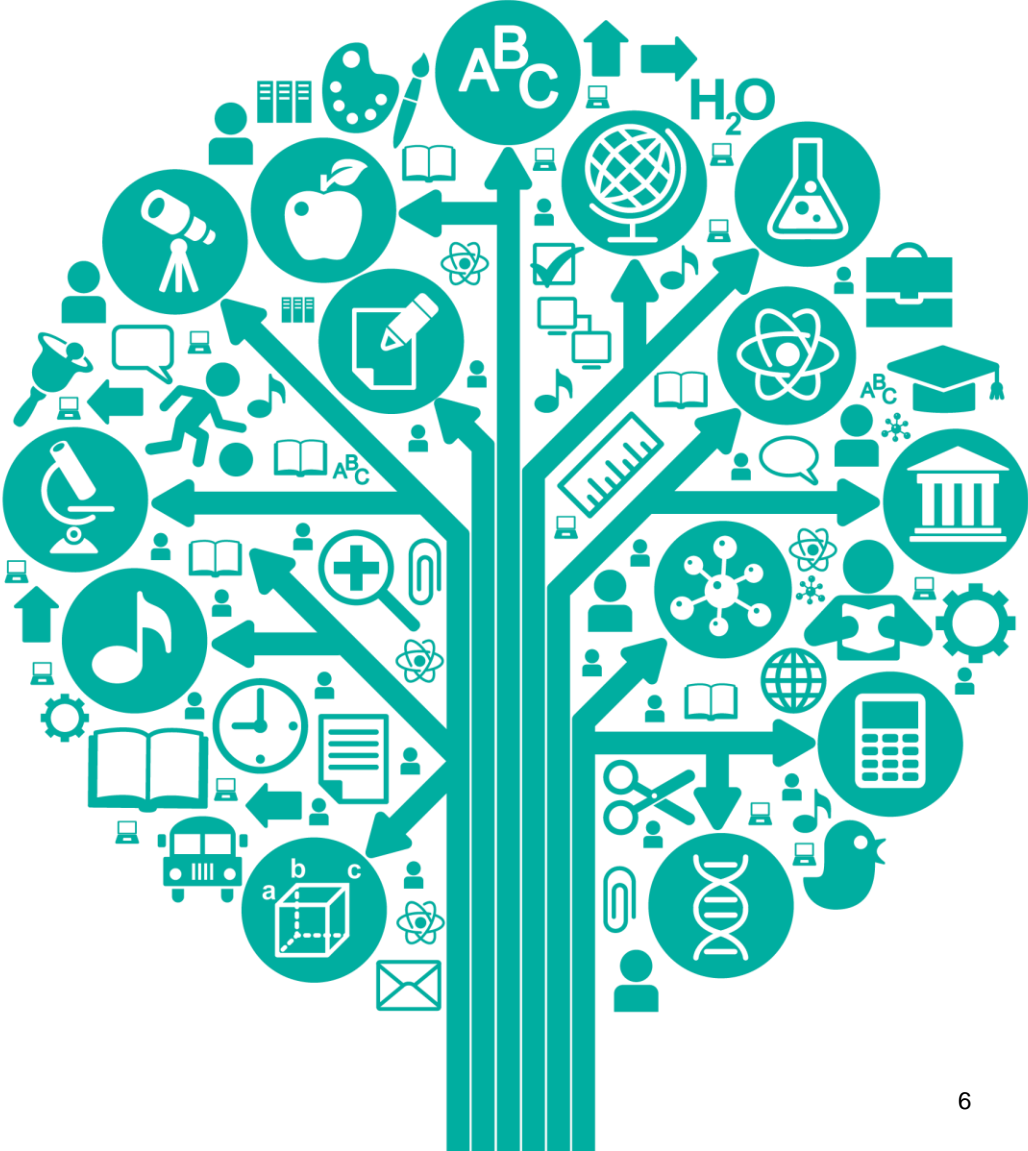
Retailers' Advertisements Influencing When to Shop

- Nearly one-quarter of parents (23 percent) had already done most of their back-to-school shopping by the end of June and 58 percent of parents plan to do most of their back-to-school shopping between July 16 and August 15. A large majority (81 percent) of parents will be finished with the bulk of their back-to-school shopping by mid-August.
- Four out of ten parents said that retailers' advertisements and commercials influence their decision-making on when to do their back-to-school shopping.
- However, they had mixed opinions about the best time to shop for the best deals: 40 percent spread out their shopping throughout the summer and school-year; 35 percent shop early in the season; and 23 percent shop late in the season to get the best discounts.

Pricing and Deals Drive Online Shopping

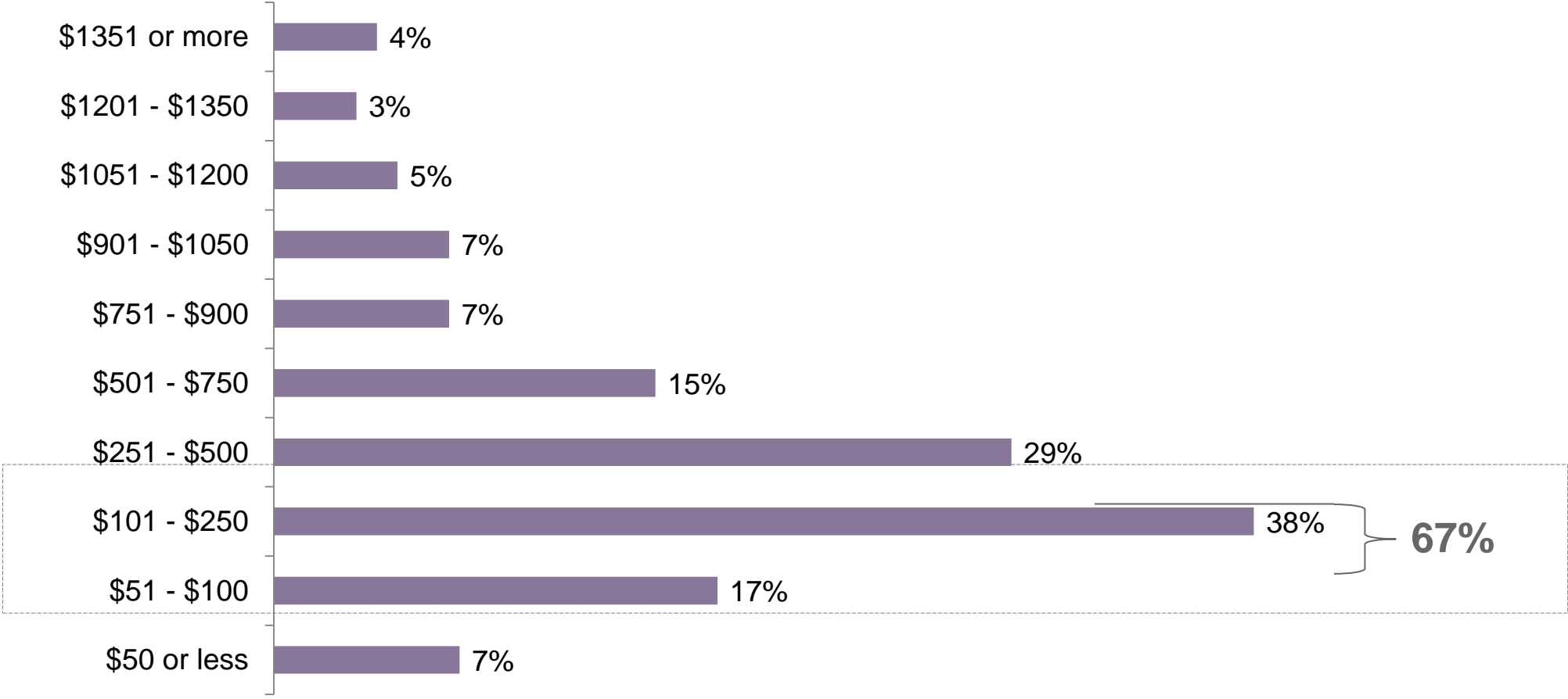
- For those parents planning to shop online, most will use their home computer (89 percent), but nearly one-third (30 percent) will use a smartphone or tablet (31 percent).
- When asked why they choose to shop online, searching for deals and the best price are the top reasons, above convenience: 65 percent expect to save money or find better discounts by shopping online; 59 percent want to spend more time researching the best prices; 44 percent prefer the convenience of having everything they need shipped to their doorstep; and 22 percent hope to avoid a boring shopping trip for the children.
- Half of respondents (51 percent) said they are likely to use a subscription service from a retailer for school-related purchases.

Key Findings



67 percent of parents plan to spend between \$100 and \$500 and 41 percent plan to spend \$500 or more for back-to-school shopping this year

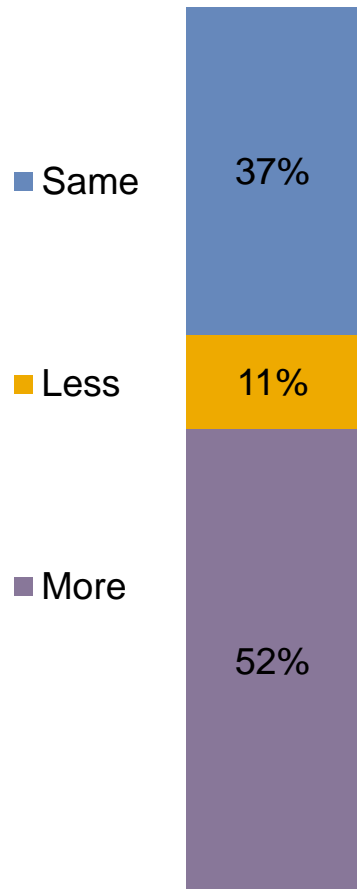
How much do you expect to spend on your back-to-school shopping this year in total?



*The percentages are based on the spending categories that each respondent (parent) may select for each of their children, and therefore the total exceeds 100 percent. There were 897 children amongst the 500 parents.

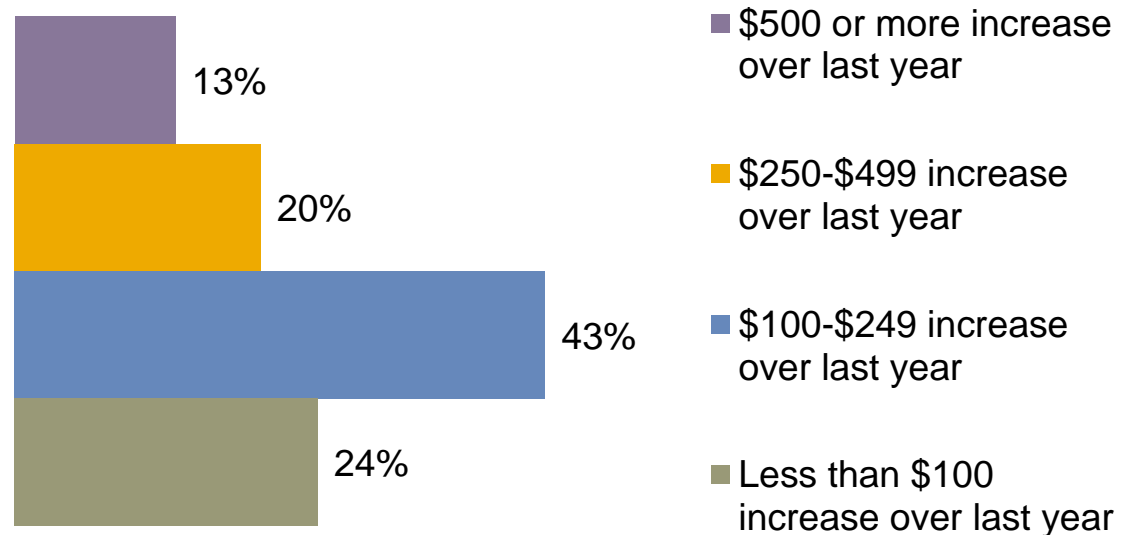
52 percent of parents plan to spend more on back-to-school shopping than last year; of those 33 percent plan to increase their spending by \$250 or more

Will you be spending more, the same, or less on back-to-school shopping this year compared to last year?



Base=Total; n=500

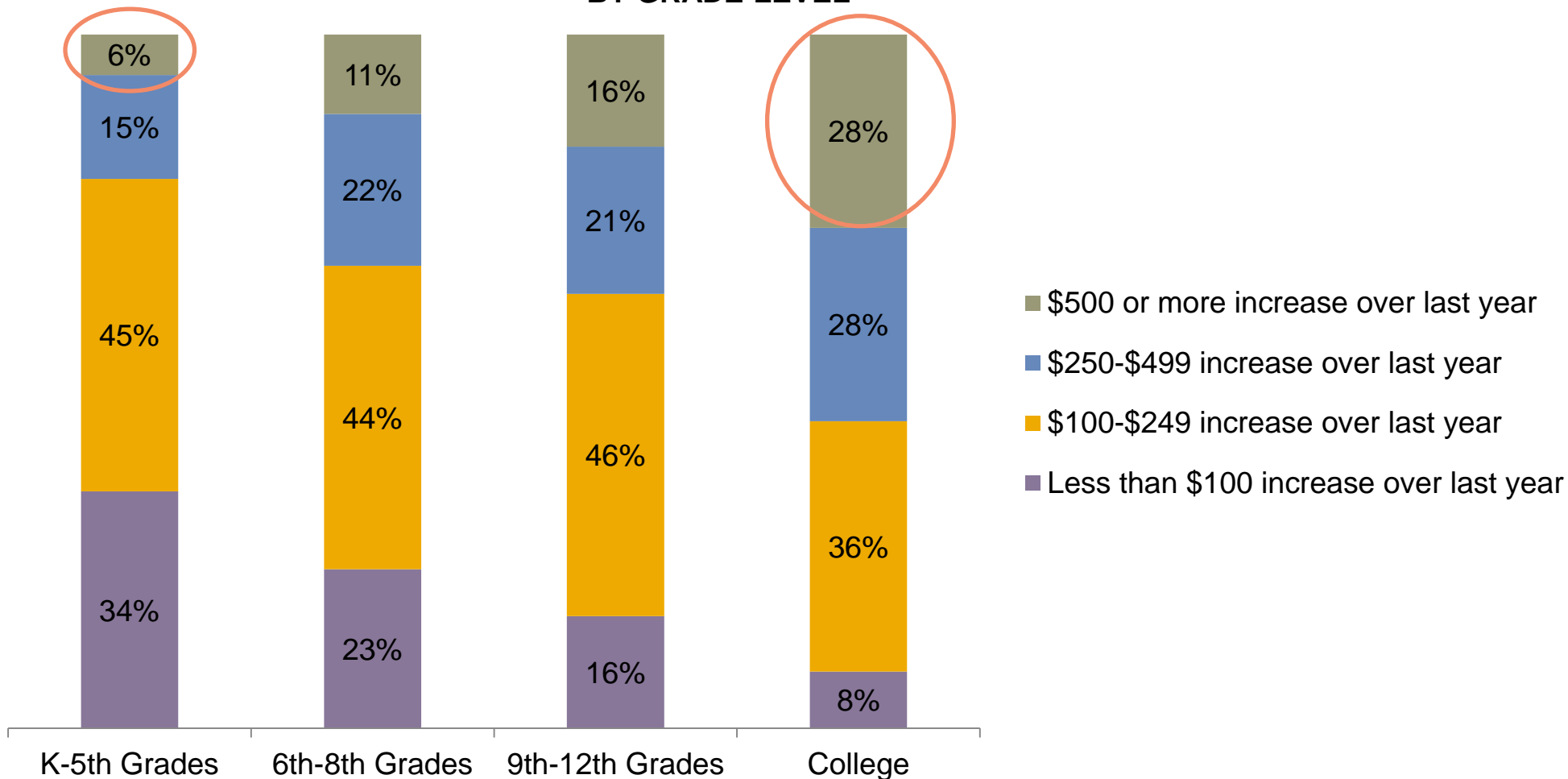
How much more do you estimate you will spend on your back-to-school shopping this year compared to last year?



Base=Spending more than last year; n=262

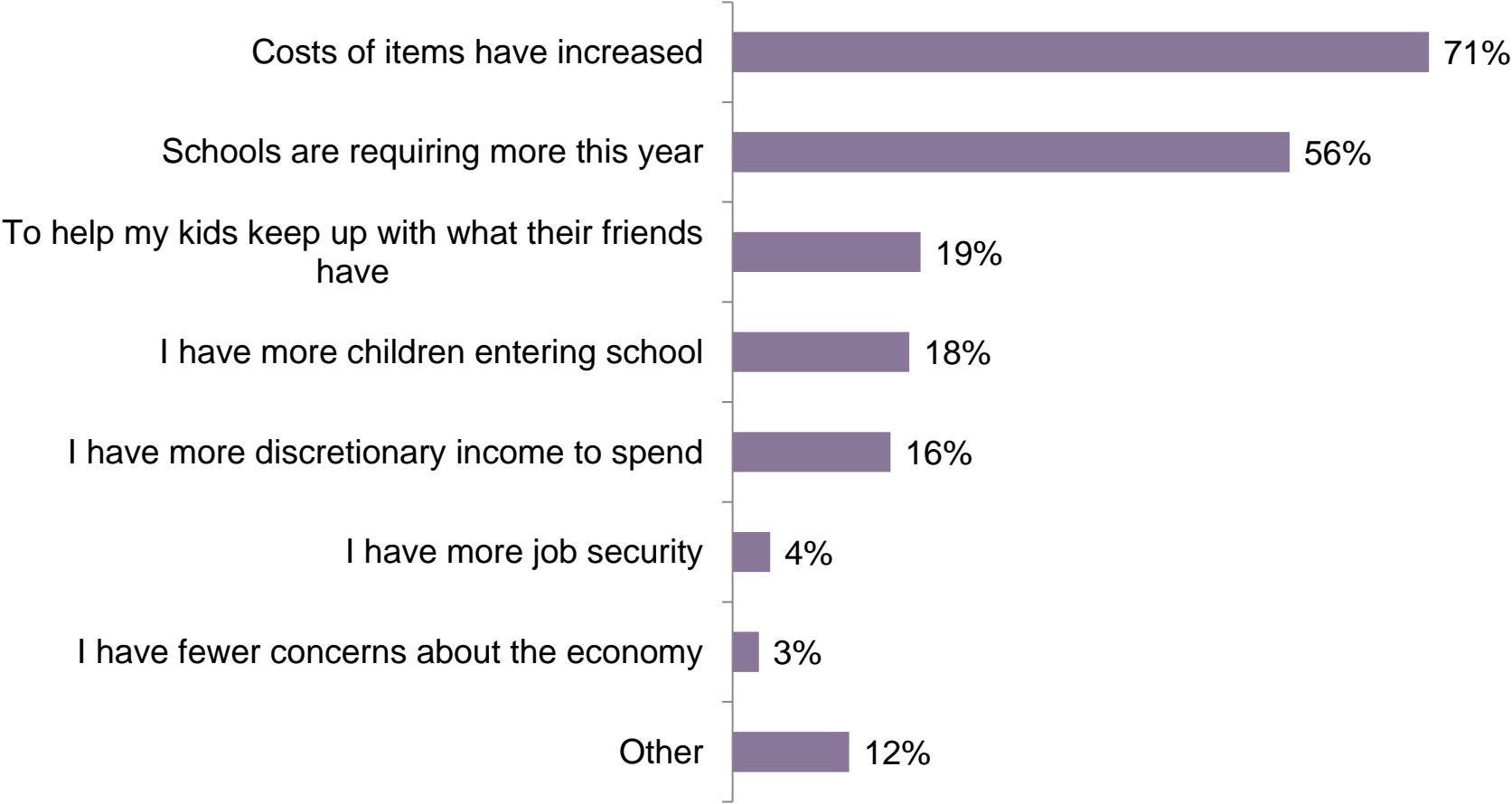
Spending on older children is driving the increase: 28 percent of parents of college students expect to spend \$500 or more than last year, compared to only six percent of K-5 parents

**How much more do you estimate you will spend on your back-to-school shopping this year compared to last year?
BY GRADE LEVEL**



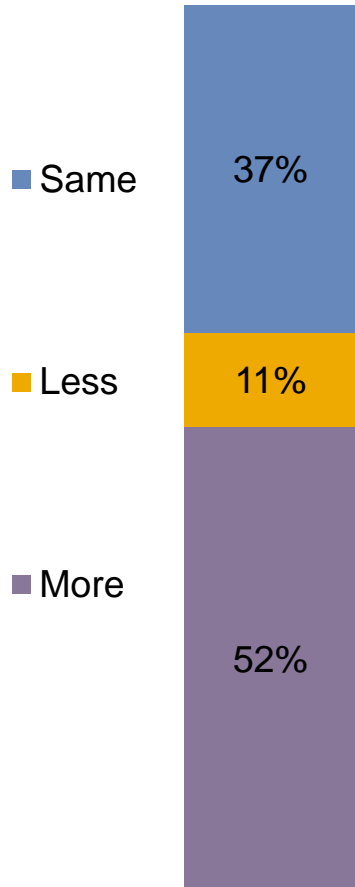
According to parents, rising costs and increased school requirements are driving a necessity to spend more this year

Why are you spending more this year?



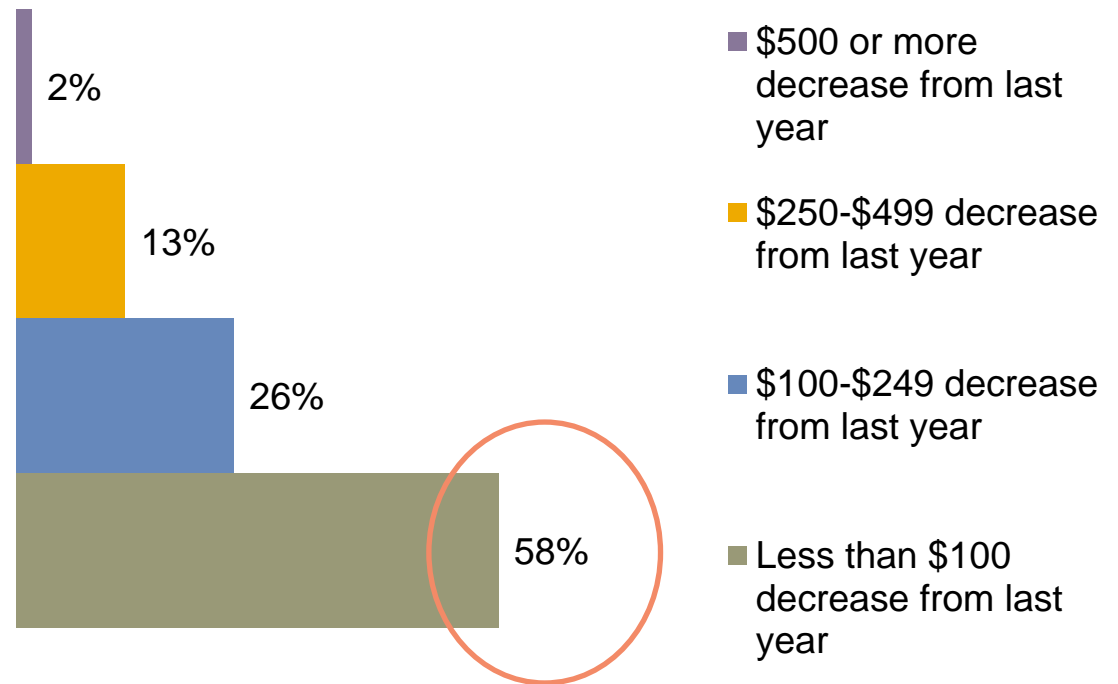
Of the only 11 percent of parents expecting to spend less than last year, 58 percent plan to decrease spending by \$100 or less

Will you be spending more, the same, or less on back-to-school shopping this year compared to last year?



Base=Total; n=500

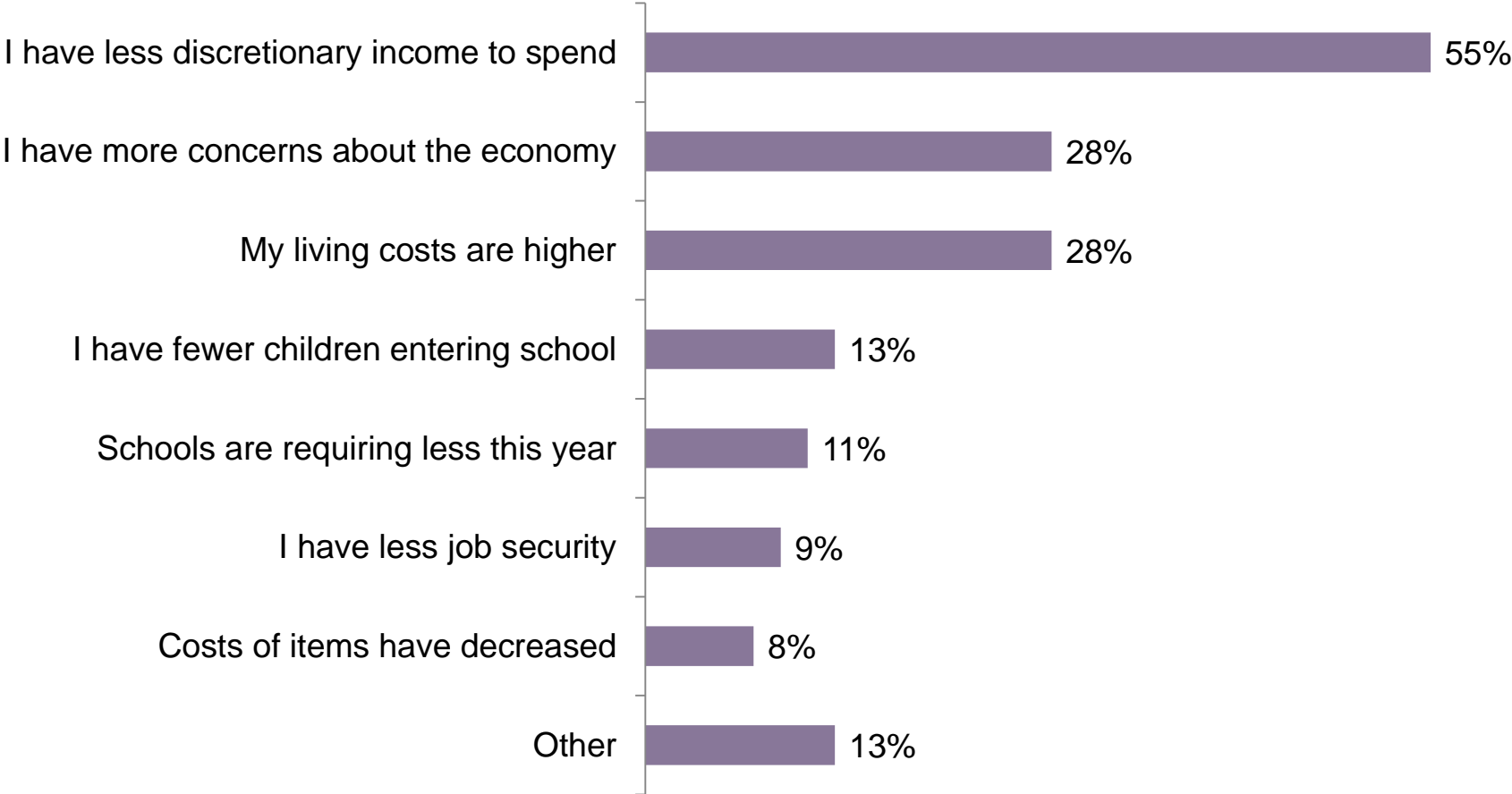
How much less do you estimate you will spend on your back-to-school shopping this year compared to last year?



Base=Spending less than last year; n=53

Parents planning to spend less than last year cited less discretionary income, higher living costs and economic concerns at the top reasons

Why are you spending less this year?



Base=Spending less than last year; n=53

89 percent of parents plan to do “most” of their back-to-school shopping in a physical store

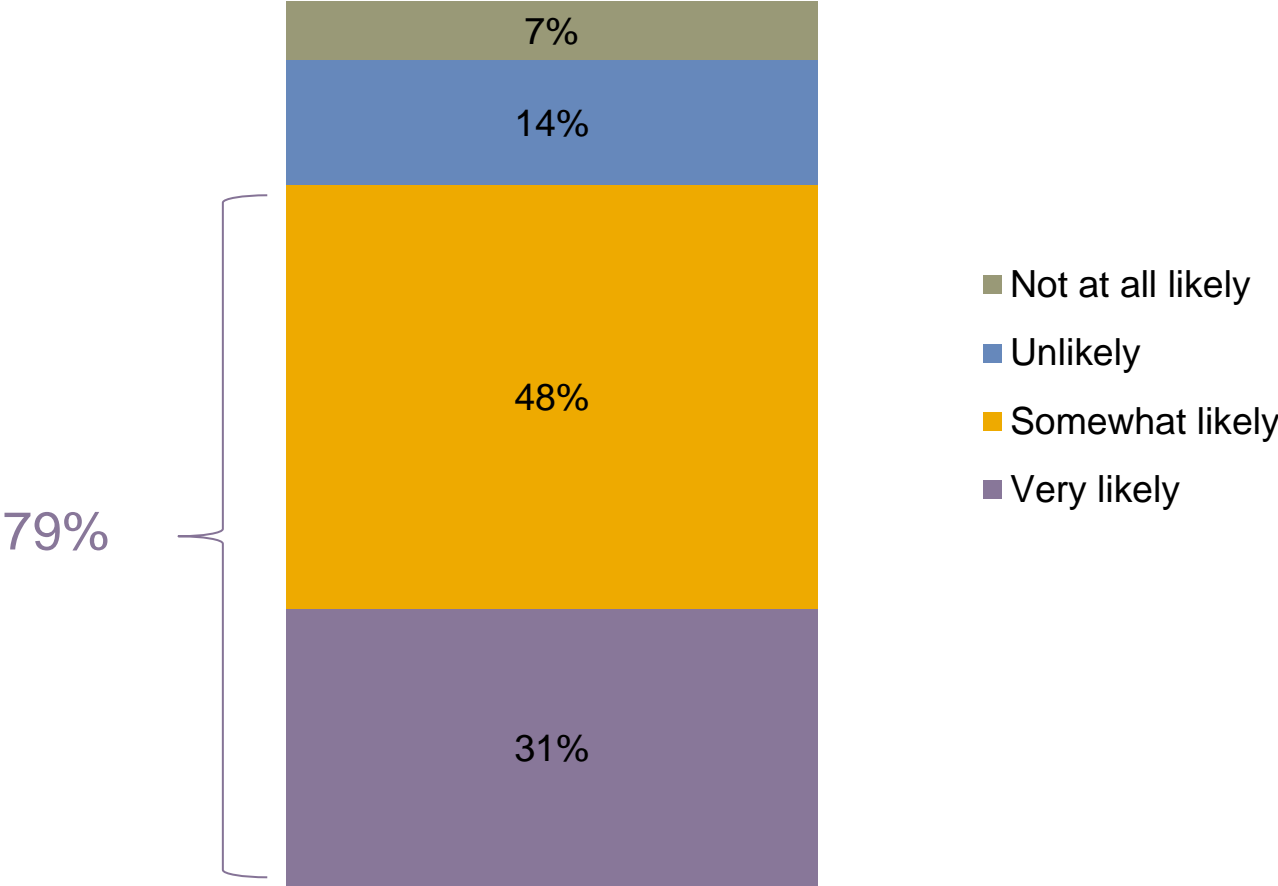
Will you do “most” of your back-to-school shopping online or in a physical store?



Base=Total; n=500

79 percent of parents are likely to participate in “webrooming” – browsing online and then going to a store to make their purchase, highlighting the growing importance of seamless retailing

**How likely are you to look at items online, then go to a store to make your purchase?
(Plan to participate in “webrooming”)**



Base=Total; n=500

The top reasons for webrooming are to check stock online before going to the store, to touch and feel the product they searched for and to avoid shipping costs

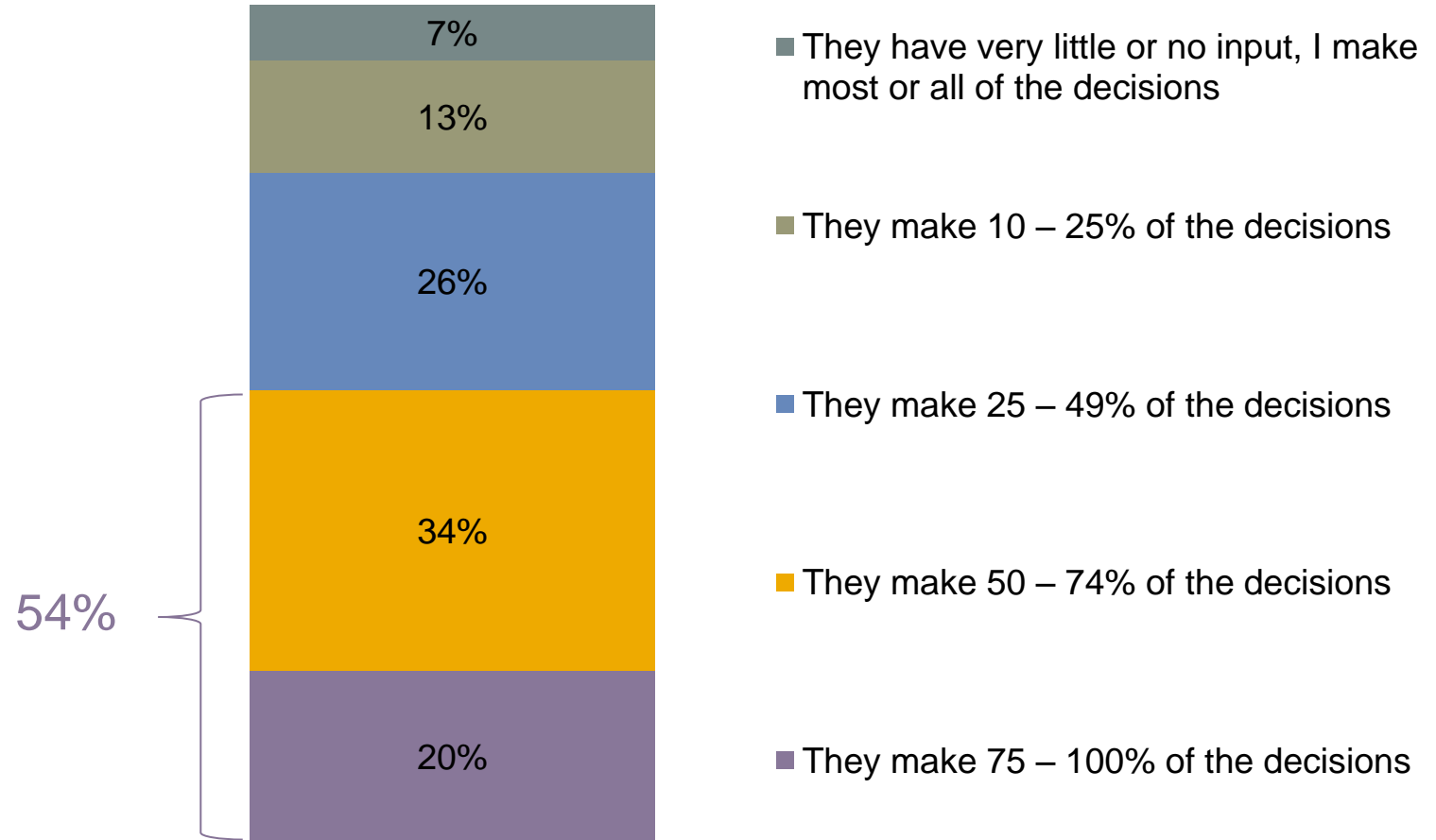
Why would you (webroom) look online for an item before going to the physical store to make a purchase?



Base=Likely to participate in webrooming; n=396

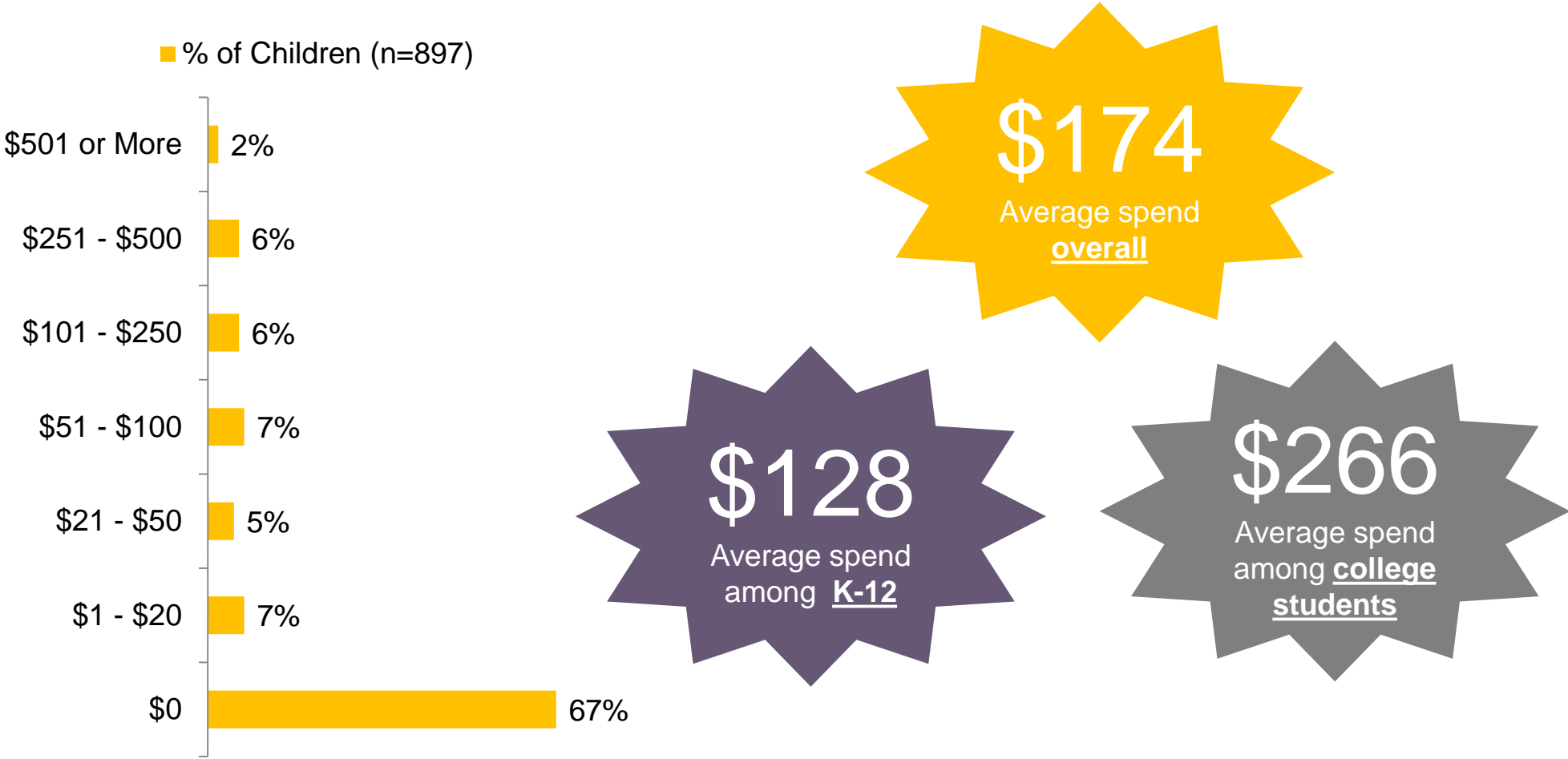
Children are key influencers of back to school spending; 54 percent of parents say their children make more than half the decisions

How much influence do your children have when it comes to back-to-school shopping?



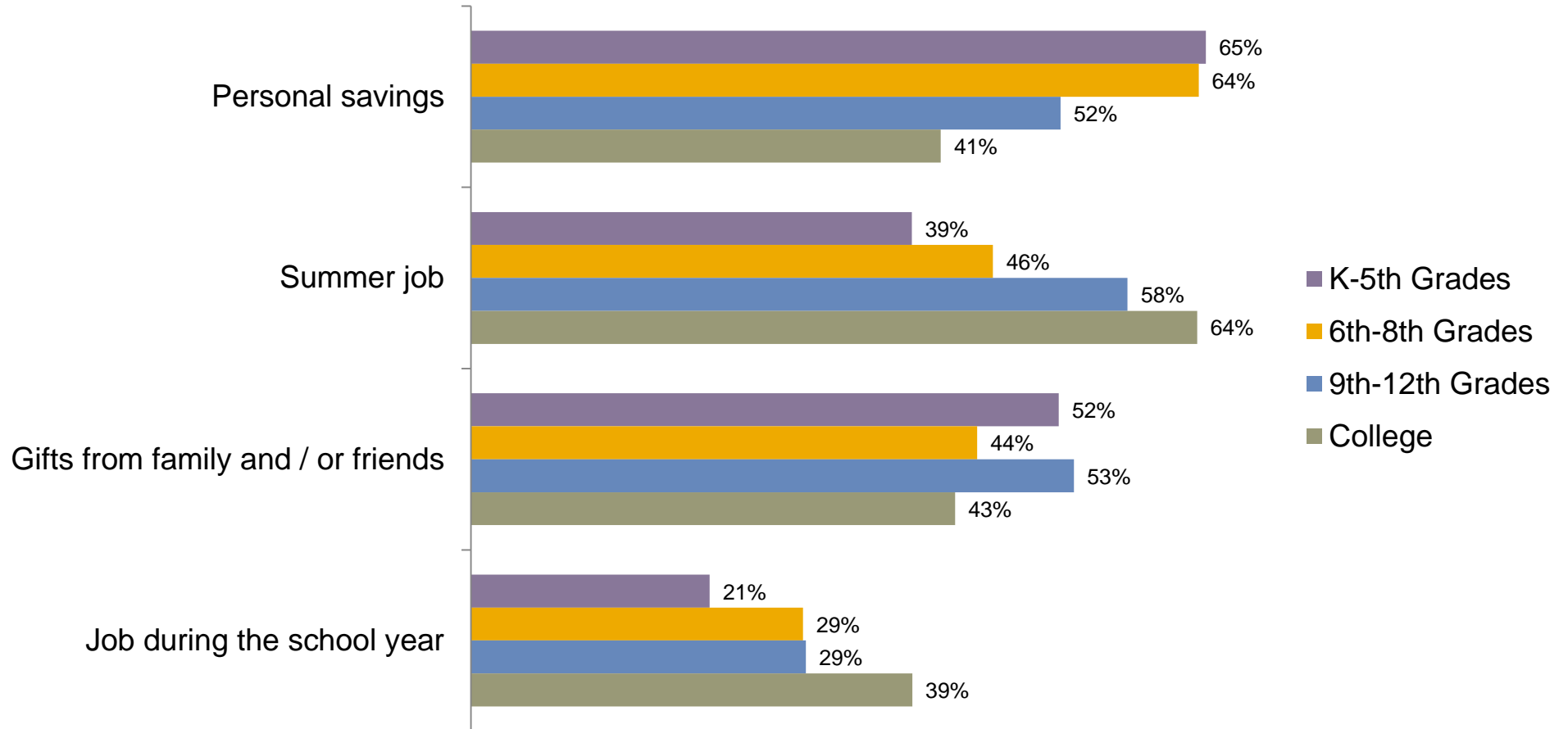
One-third of children are expected to spend their own money on back-to-school shopping – \$266 on average for college students and \$128 on average for K-12 students

How much of their own money will your kid(s) be spending on back-to-school shopping?



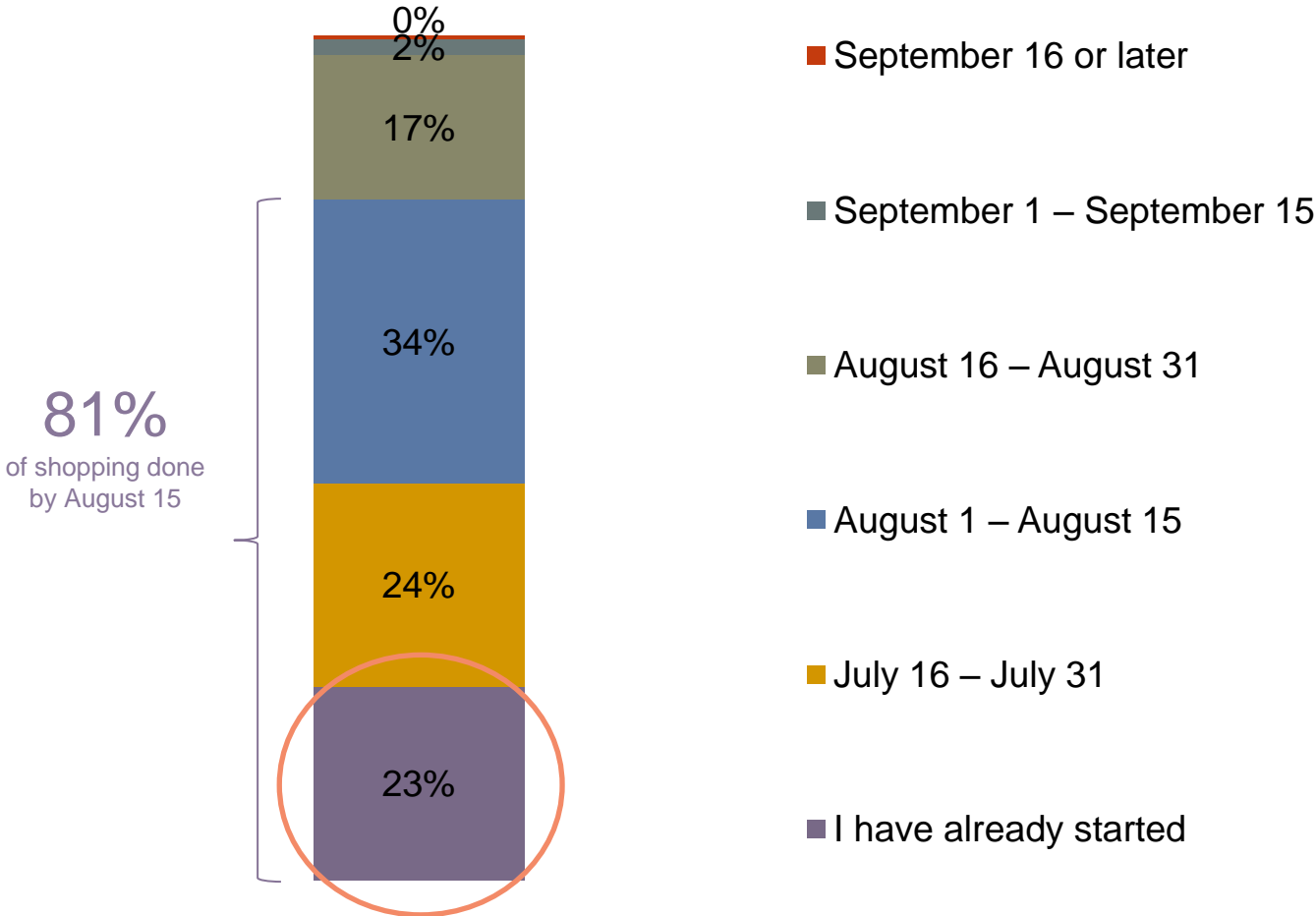
Children who will be spending their own money will use saving and gifts with older children using more money earned from jobs

Where did your kid(s) acquire the money to spend on their back-to-school shopping?



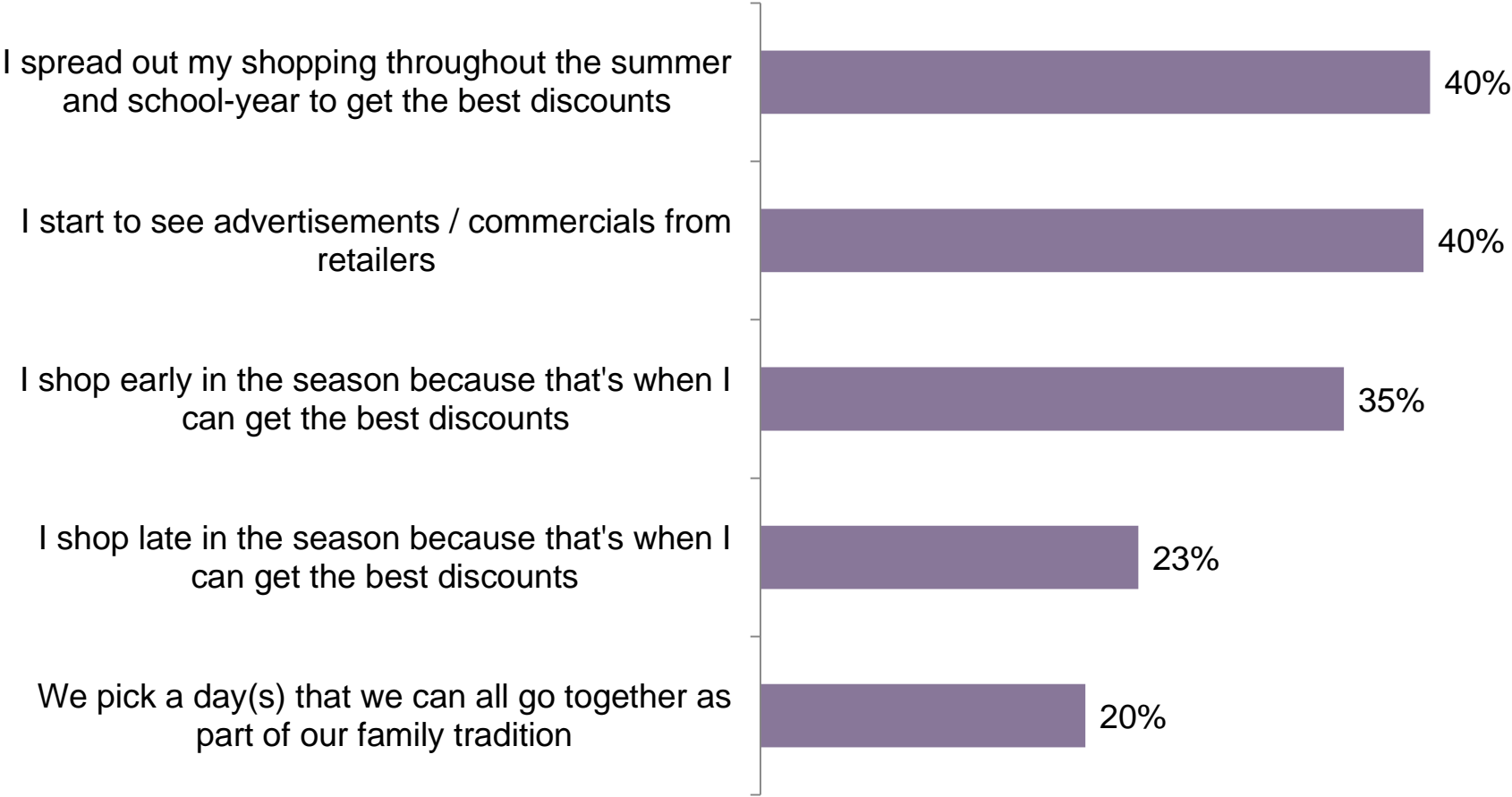
Nearly one-quarter of parents (23 percent) had finished most of their back-to-school shopping by late June and a large majority (81 percent) of parents will be finished with most shopping by mid-August

When do you plan to do most of your back-to-school shopping?



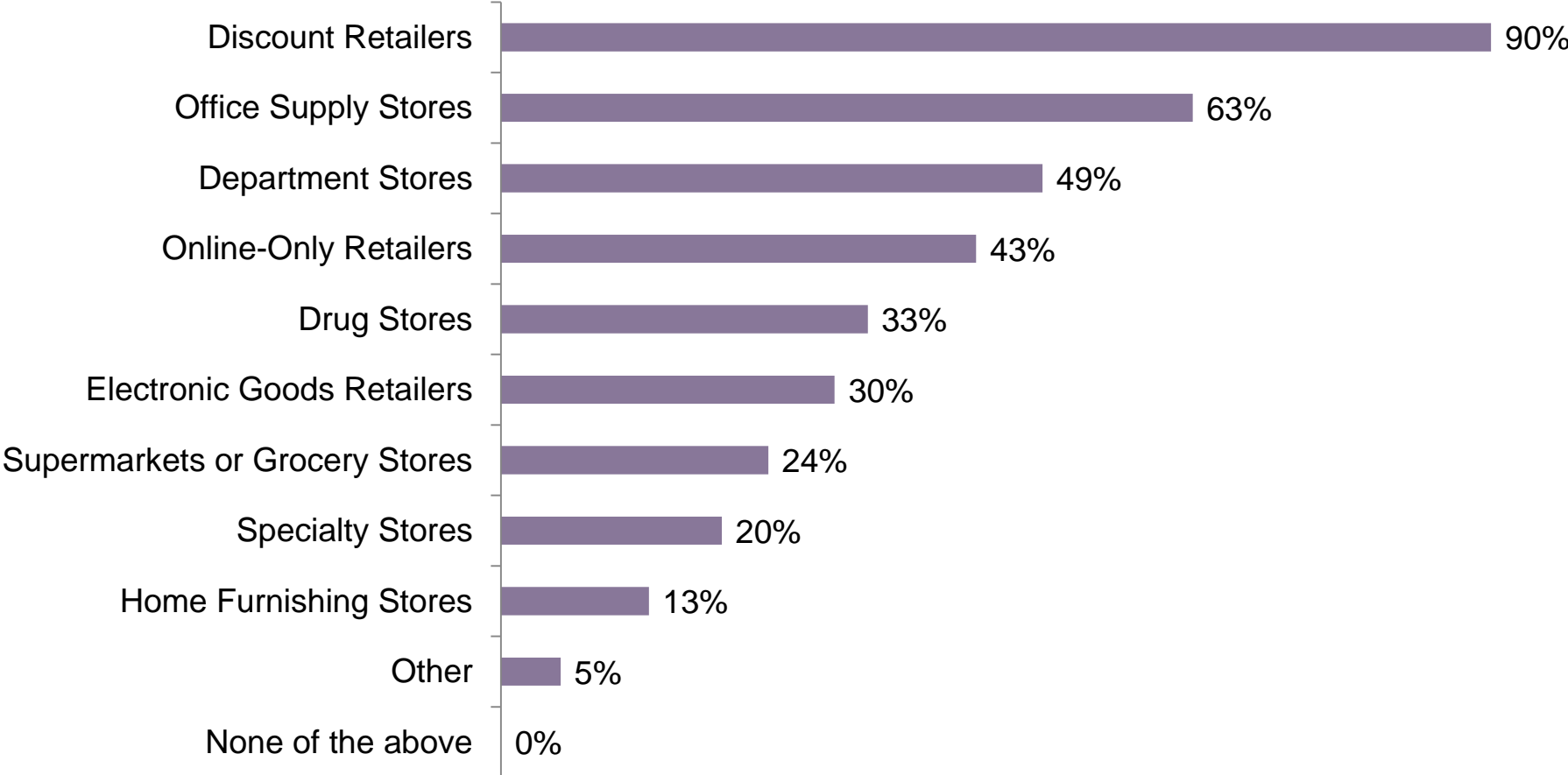
Retailers' advertisements are influencing the timing of back-to-school shopping; however, parents had mixed opinions about the best time to shop for the best deals

What influences the timing of your back-to-school shopping?



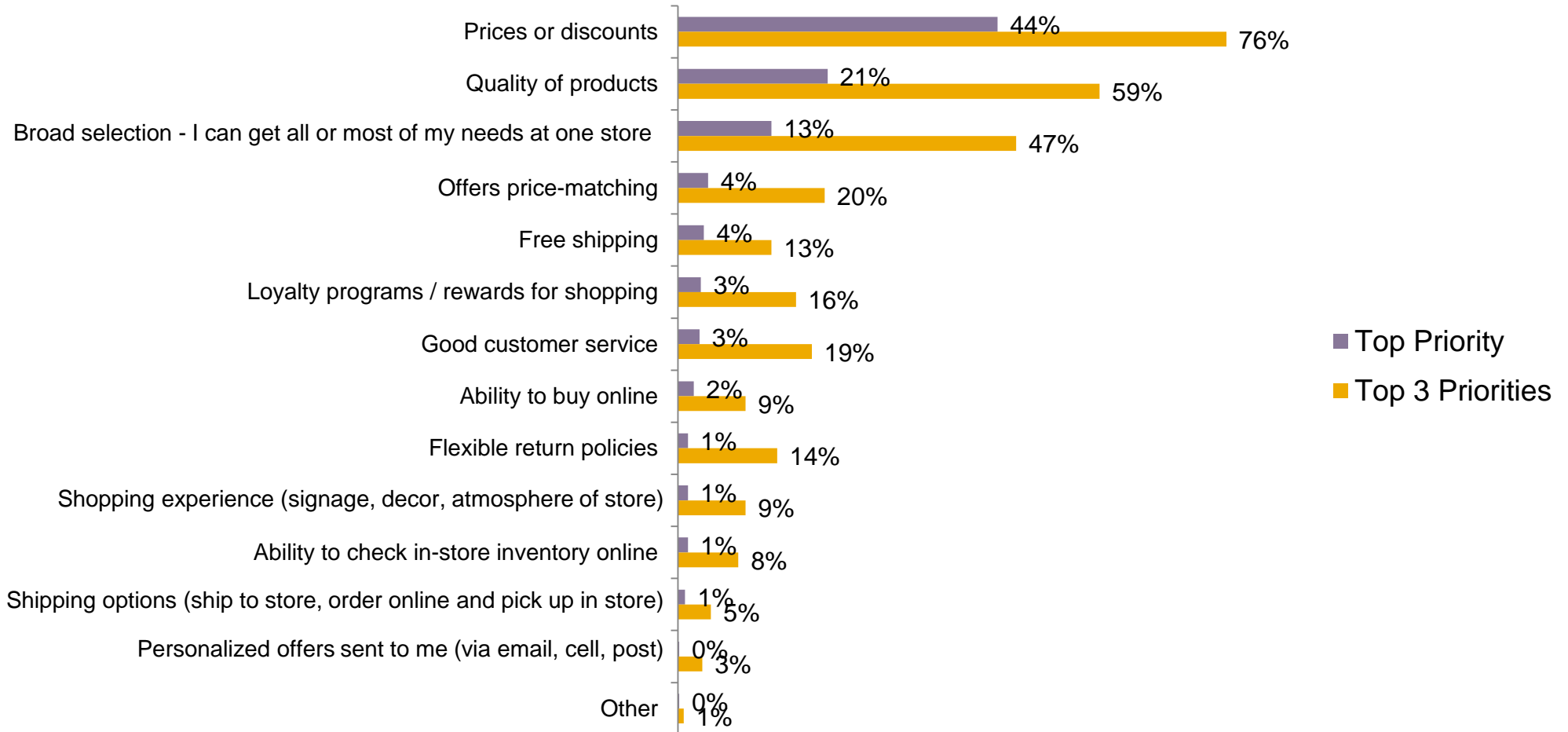
Discount retailers are the number-one shopping destination by far for back-to-school shopping, followed by office supply stores, department stores and then online-only retailers

In what type(s) of stores will you be doing your back-to-school shopping this year?



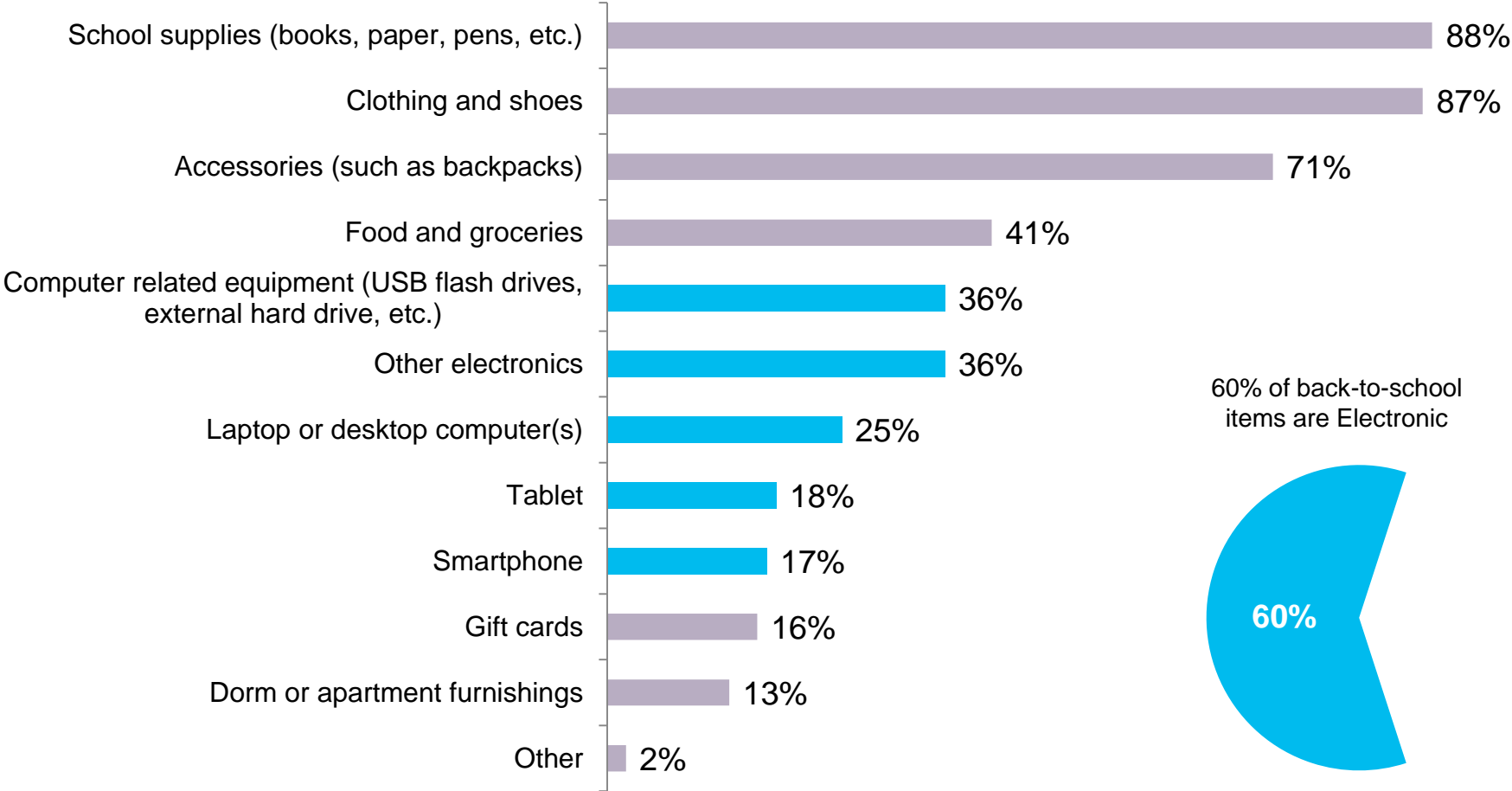
Pricing, quality and a broad selection are the most important factors for parents when choosing a retailer for back-to-school

Please rank your top 3 priorities from the following list in order of importance when choosing a retailer for back-to-school products.



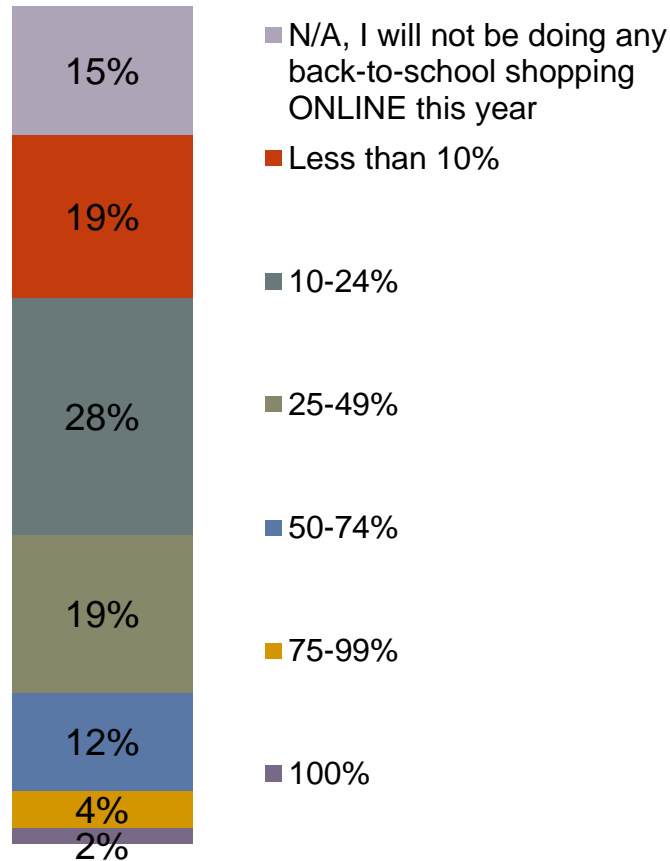
The top items on back-to-school shopping lists this year are school supplies (88 percent), clothing and shoes (87 percent), accessories (71 percent) and electronics (60 percent)

What type of back-to-school items are on your shopping list this year?



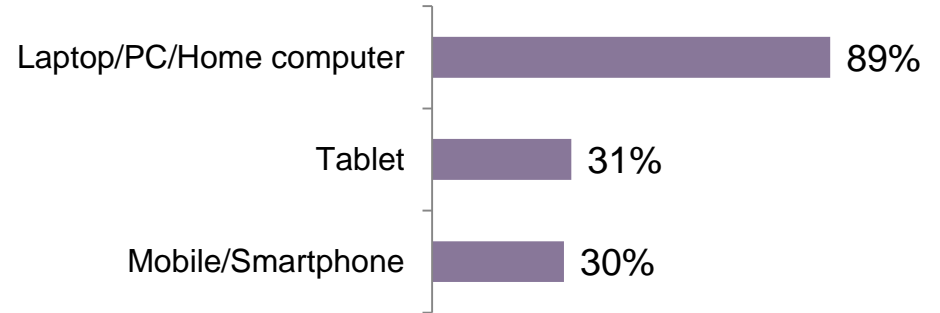
Of those shopping online, nearly one-third will use a smartphone (30 percent) or tablet (31 percent); searching for deals and the best prices are the top reasons for online shopping

How much of your back-to-school shopping do you plan to do online?

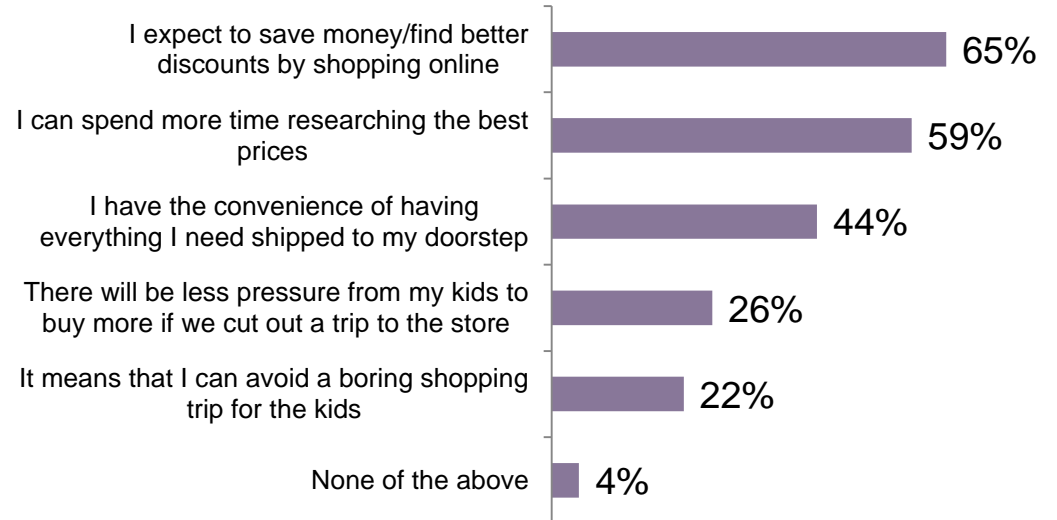


Base=Total; n=500

Which of the following devices will you use for your online back-to-school shopping?



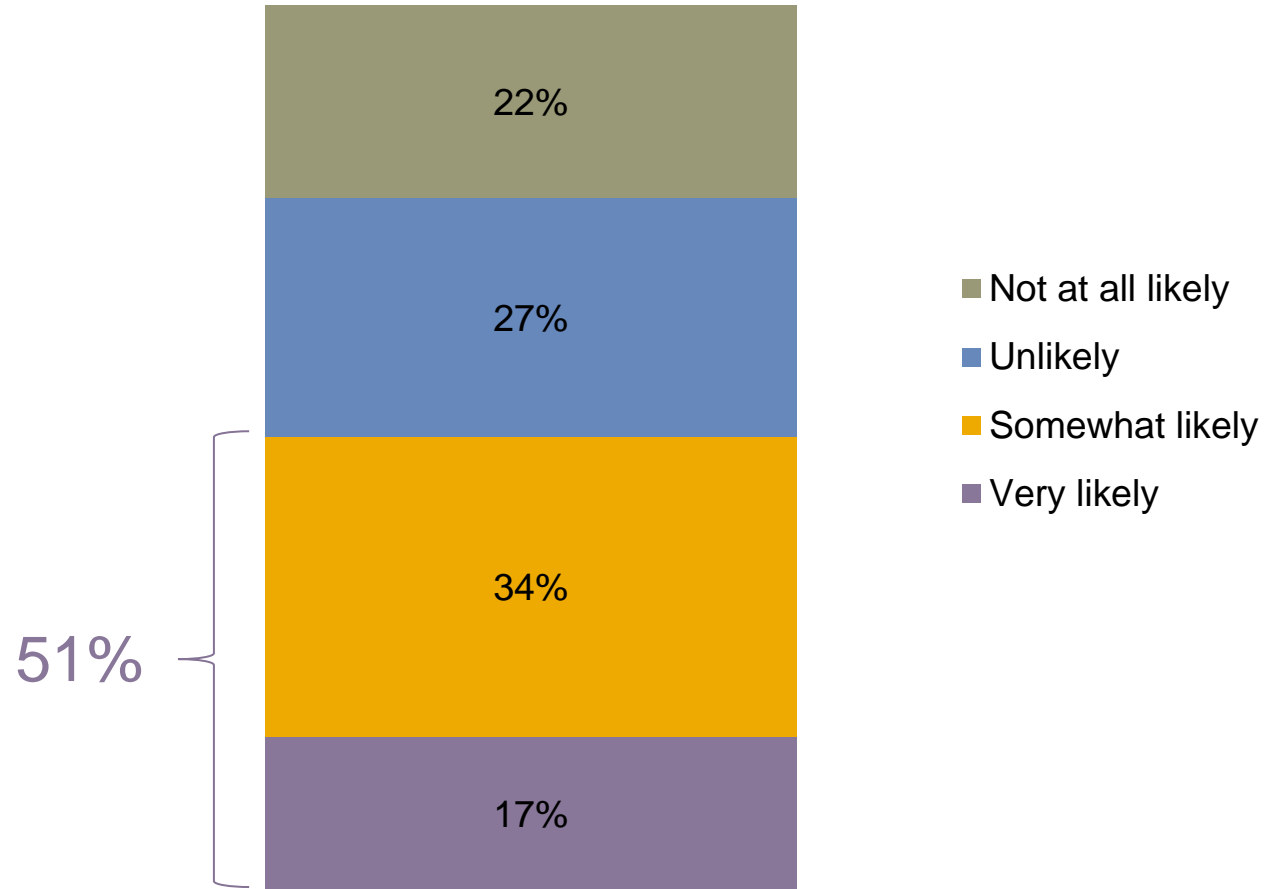
Please select the following statements with which you agree with regards to your online back-to-school shopping.



Base=Plan to shop online; n=423

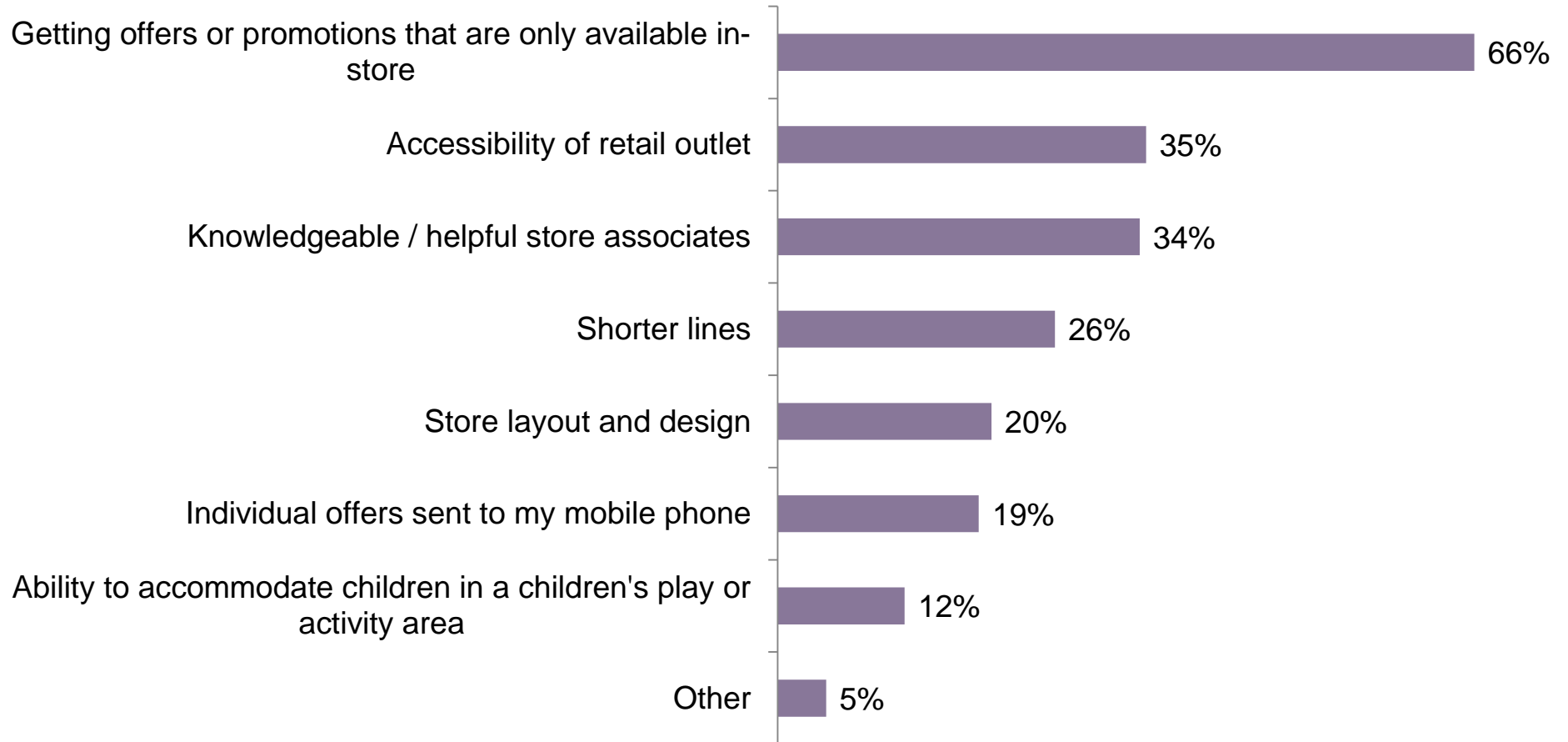
Half of parents (51 percent) said they are likely to use a subscription service from a retailer for school-related purchases

Some retailers are starting to offer subscription services that allow consumers to order products from their website on a recurring schedule and have them delivered to their home. How likely are you to use such a service for school or college related purchases?



Parents would be willing to do more back-to-school shopping in a physical store if they get offers or promotions that are only available in-store

What would influence you to do more of your back to school shopping in-store?



Base=Total; n=500