

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"With many retailers expanding the scope of their price matching policies, differentiating based on low prices is becoming increasingly difficult. However, shoppers' trust is an increasingly important currency that can be exchanged for engagement."

- Bryant Harland, Technology and Media Analyst

This report looks at the following areas:

- · Back-to-school shopping participation
- · Differentiation in back-to-school sales: Beyond discounts
- In-store and online back-to-school shopping

Anticipated back-to-school shopping spending has remained steady since 2010. In 2014, consumers reported they planned to spend just under \$75 billion on back-to-school in total (including both kindergarten through grade 12 and college spending), marking a slight increase from 2013. However, retailers face a growing challenge in the heightened demand for multichannel experiences across all retail categories.

This report explores what consumers want out of the retail experience when back-to-school shopping as well as the prominence of online and in-store purchasing. Other topics explored in this report include the types of information used on path to purchase, back-to-school shopping opinions, and both college and shopping for grades kindergarten through 12.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Scope and Themes

What you need to know

Definition

Data sources

Market overview

Market drivers

Consumer qualitative research

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Executive Summary

Overview

The market

Figure 1: Consumers' planned back-to-school spending (billions) - College and K-12, 2007-14

Key players

The consumer

Only 11% of back-to-school shoppers plan to spend less in 2015

Figure 2: Planned back-to-school spending, October 2014

Information used on path to purchase

Figure 3: Information used on path to purchase, October 2014

Online and in-store back-to-school shopping

Figure 4: Retailers visited for back-to-school shopping, October 2014

What we think

Issues and Insights

Back-to-school shopping participation

The issues

The implications

Differentiation in back-to-school sales: Beyond discounts

The issues

The implications

In-store and online back-to-school shopping

The issues

The implications

Trend Applications

Trend: Extend My Brand



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Trend: Life Hacking
Trend: Experience is All

Market Overview

Key points

Planned back-to-school spending for grades K-12

Figure 5: Consumers' planned back-to-school spending (billions) - K-12, 2007-14

Planned back-to-school spending for college

Figure 6: Consumers' planned back-to-school spending (billions) - college, 2007-14

Market Drivers

Key points

Education budgets fall between 2008 and 2014

Modest growth in education enrollment, driven primarily by increased college attendance

Figure 7: US population aged 3 and older enrolled in school, by grade level, 2000-13

Figure 8: US population aged 3 and older enrolled in school, by grade level, 2000-13 (cont.)

Students starting to go digital

Marketing Strategies and Innovations

Bed Bath & Beyond

Back-to-school shopping starts giving back to schools

Social Media

Key findings

Market overview

Key social media metrics

Figure 9: Key social media metrics for select back-to-school retailers, December 2014

Brand usage and awareness

Figure 10: Brand usage and awareness for select back-to-school retailers, October 2014

Interactions with select back-to-school retailers

Figure 11: Levels of interaction for select back-to-school retailers, October 2014

Leading online campaigns

Online tools

Charitable initiatives

Video

What we think

Online conversations

Figure 12: Online mentions for select back-to-school retailers, by week, Dec. 15, 2013-Dec. 14, 2014

Where are people talking about BTS retailers online?

Figure 13: Online mentions for select back-to-school retailers, by page type, Dec. 15, 2013-Dec. 14, 2014

What are people talking about?

Figure 14: Topics of conversation for select back-to-school retailers, Dec. 15, 2013-Dec. 14, 2014

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Participation in Back-to-school Shopping

Key points

Nearly half of consumers went back-to-school shopping in 2014

Figure 15: Back-to-school shopping participation, by age, October 2014

BTS Shoppers: Who are they shopping for?

Figure 16: Target audience for back-to-school products, by gender and age, October 2014

More than one third of college shoppers are earning Bachelor's degrees

Figure 17: Degree being earned by college back-to-school shoppers, October 2014

Retailers Visited for Back-to-school Products

Key points

Online makes less frequented BTS destinations more competitive

Figure 18: Retailers visited for back-to-school shopping, October 2014

25-34s visit the largest range of retailers

Figure 19: Retailers visited for back-to-school shopping - Any shopping, by age, October 2014

Fathers more likely to buy BTS items online

Figure 20: Retailers visited for back-to-school shopping – purchased products online, by parental status by gender and presence of children in household, October 2014

College BTS shoppers turn to Amazon

Figure 21: Retailers visited for back-to-school shopping – Purchased products online, by target audience for back-to-school products,

Planned Back-to-school Shopping Spending in 2015

Key points

More than half of 25-34s planning to spend more on BTS shopping in 2015

Figure 22: Planned back-to-school spending, by age, October 2014

Men show elevated interest in BTS electronics

Figure 23: Planned back-to-school spending for product categories, by gender and age, October 2014

Planned electronics spending increases slightly after grade six

Figure 24: Planned back-to-school spending, by target audience for back-to-school products, October 2014

Consumers' Back-to-school Shopping Behavior

Key points

One in five BTS shoppers see shopping late as a good way to save money

Figure 25: Back-to-school shopping experience opinions, by gender, October 2014

Quality versus price in back-to-school shopping

Figure 26: Back-to-school shopping experience opinions, by household income, October 2014

Nearly 40% of parents say they would spend more on their children than on themselves

Figure 27: Back-to-school shopping experience opinions, by age, October 2014

Information Used on Path to Purchase

Key points

Brand familiarity becomes more important with age

Figure 28: Information used on path to purchase - Any rank, by age, October 2014

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Fathers more receptive to TV ads

Figure 29: Information used on path to purchase - Any rank, by parental status by gender with children in household, October 2014

Back-to-school shoppers and retailers' expertise

Figure 30: Information used on path to purchase - Any rank, by back-to-school shopping experience opinions, October 2014

Desired Improvements to the Back-to-school Shopping Experience

Key points

Discounts lead desired retail improvements

Figure 31: Improvements for the back-to-school shopping experience - Any rank, by gender and age, October 2014

Back-to-school shoppers seek faster checkout, larger product selections

Figure 32: Improvements for the back-to-school shopping experience – Any rank, by household income, October 2014

Fathers interested in product/service bundles

Figure 33: Improvements for the back-to-school shopping experience – Any rank, by parental status by gender with children in household, October 2014

Opinions and Attitudes Regarding Back-to-school Shopping

Key points

Creating positive in-store experiences among young back-to-school shoppers

Figure 34: Overall opinions regarding back-to-school shopping - Any agree, by gender and age, October 2014

The influence of children on BTS shoppers

Figure 35: Overall opinions regarding back-to-school shopping – Any agree, by parental status by gender with children in household, October 2014

Kids' Opinions about School and Advertising

Key points

Kids' freedom to select back-to-school brands

Figure 36: Kids' school supplies, by age, April 2013-June 2014

Are there enough children-focused media?

Figure 37: Kids' attitudes regarding media, by age, April 2013-June 2014

Impact of Hispanic Origin

Key points

Nearly half of Hispanics plan to spend more on back-to-school in 2015

Figure 38: Planned back-to-school spending, by race/Hispanic origin, October 2014

Hispanics less interested in coupons, show elevated interest in price comparison tools

Figure 39: Information used on path to purchase - Any rank, by race/Hispanic origin, October 2014

Hispanics face conflicting demands when shopping for back-to-school

Figure 40: Overall opinions regarding back-to-school shopping - Any agree, by race/Hispanic origin, October 2014

Qualitative Research

Key points

Back-to-school planning and research habits

Technology and BTS shopping

Consumers' path to purchase: deciding what and where to buy

Influence of others on back-to-school shoppers

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Back-to-school shopping frustrations

The ideal back-to-school shopping day

Cluster Analysis

Figure 41: Target clusters, October, 2014

Impassioned shoppers

Demographics

Characteristics

Opportunities

Productivity-focused shoppers

Demographics

Characteristics

Opportunities

Indifferent shoppers

Demographics

Characteristics

Opportunities

Cluster characteristic tables

Figure 42: Target clusters, October 2014

Figure 43: Target audience for back-to-school products, by target clusters, October 2014

Figure 44: Retailers visited for back-to-school shopping – Any shopping, by target clusters, October 2014

Figure 45: Planned back-to-school spending, by target clusters, October 2014

Figure 46: Planned back-to-school spending for product categories, by target clusters, October 2014

Figure 47: Back-to-school shopping experience opinions, by target clusters, October 2014

Figure 48: Improvements for the back-to-school shopping experience – Any rank, by target clusters, October 2014

Figure 49: Overall opinions regarding back-to-school shopping - Any agree, by target clusters, October 2014

Cluster demographic tables

Figure 50: Target clusters, by demographics, October 2014

Cluster methodology

Appendix – Other Useful Consumer Tables

2014 Back-to-school shopping participation

Figure 51: Back-to-school shopping participation, by gender and age, October 2014

Figure 52: Back-to-school shopping participation, by race/Hispanic origin, October 2014

Who consumers purchased back-to-school items for

Figure 53: Target audience for back-to-school products, by age, October 2014

Figure 54: Target audience for back-to-school products, by household income, October 2014

Figure 55: Target audience for back-to-school products, by parental status by gender with children in household, October 2014

Retailers visited for back-to-school shopping

Figure 56: Retailers visited for back-to-school shopping – Any shopping, by gender and age, October 2014

Figure 57: Retailers visited for back-to-school shopping – Any shopping, by household income

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 58: Retailers visited for back-to-school shopping - Any shopping, by race/Hispanic origin, October 2014

Retailers shopped for back-to-school - Online

- Figure 59: Retailers visited for back-to-school shopping Purchased products online, by age, October 2014
- Figure 60: Retailers visited for back-to-school shopping Purchased products online, by household income, October 2014

Retailers shopped for back-to-school – In-store

Figure 61: Retailers visited for back-to-school shopping – Purchased products in-store, by age, October 2014

Planned back-to-school spending in 2015

- Figure 62: Planned back-to-school spending, by gender and age, October 2014
- Figure 63: Planned back-to-school spending, by household income, October 2014
- Figure 64: Planned back-to-school spending, by parental status with children in household, October 2014
- Figure 65: Planned back-to-school spending, by parental status by gender with children in household, October 2014
- Figure 66: Planned back-to-school spending, by type of back-to-school shopper, October 2014

Back-to-school shoppers' path to purchase

- Figure 67: Information used on path to purchase Any rank, by gender and age, October 2014
- Figure 68: Information used on path to purchase, by target audience for BTS products, October 2014

Back-to-school shopping behaviors

- Figure 69: Back-to-school shopping experience opinions, by age, October 2014
- Figure 70: Back-to-school shopping experience opinions, by race/Hispanic origin, October 2014
- Figure 71: Back-to-school shopping experience opinions, by parental status by gender with children in household, October 2014
- Figure 72: Back-to-school shopping experience opinions, by type of back-to-school shopper, October 2014

Desired improvements for the back-to-school shopping experience

- Figure 73: Improvements for the back-to-school shopping experience Any rank, by age, October 2014
- Figure 74: Improvements for the back-to-school shopping experience Any rank, by parental status with children in household, October 2014
- Figure 75: Improvements for the back-to-school shopping experience Any rank, by type of back-to-school shopper, October 2014
- Figure 76: Improvements for the back-to-school shopping experience Any rank, by race/Hispanic origin, October 2014

Back-to-school shopping opinions

- Figure 77: Overall opinions regarding back-to-school shopping Any agree, by age, October 2014
- Figure 78: Overall opinions regarding back-to-school shopping Any agree, by household income, October 2014
- Figure 79: Overall opinions regarding back-to-school shopping Any agree, by parental status with children in household, October 2014
- Figure 80: Overall opinions regarding back-to-school shopping Any agree, by type of back-to-school shopper, October 2014

Kids' opinions about school and computer use

- Figure 81: Kids' opinions regarding school, by age, April 2013-June 2014
- Figure 82: Kids' computer software and game usage, by age, April 2013-June 2014
- Figure 83: Kids' computer usage, by age, April 2013-June 2014

Appendix - Social Media

Key social media metrics

Figure 84: Key social media metrics for select back-to-school retailers, December 2014

Online conversations

Figure 85: Online mentions for select back-to-school retailers, by week, Dec. 15, 2013-Dec. 14, 2014

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brand usage or awareness

- Figure 86: Brand usage or awareness, October 2014
- Figure 87: Walmart usage or awareness, by demographics, October 2014
- Figure 88: Kmart usage or awareness, by demographics, October 2014
- Figure 89: Target usage or awareness, by demographics, October 2014
- Figure 90: Amazon.com usage or awareness, by demographics, October 2014
- Figure 91: Staples usage or awareness, by demographics, October 2014
- Figure 92: Macy's usage or awareness, by demographics, October 2014

Activities done

Figure 93: Activities done, October 2014

Figure 94: Walmart - Activities done - I have looked up/talked about this brand online on social media..., by demographics, October

Egure 95: Walmart – Activities done – I have contacted/interacted with the brand online on social media to..., by demographics,

Figure 96: Walmart – Activities done – I follow/like the brand on social media because...., by demographics, October 2014

Figure 97: Walmart – Activities done – I have researched the brand on social media to...., by demographics, October 2014

Figure 98: Kmart - Activities done - I have looked up/talked about this brand online on social media..., by demographics, October 2014

Figure 99: Kmart - Activities done - I have contacted/interacted with the brand online on social media to..., by demographics, October

Figure 100: Kmart – Activities done – I follow/like the brand on social media because...., by demographics, October 2014

Figure 101: Kmart – Activities done – I have researched the brand on social media to...., by demographics, October 2014

Figure 102: Target - Activities done - I have looked up/talked about this brand online on social media..., by demographics, October 2014
Figure 103: Target – Activities done – I have contacted/interacted with the brand online on social media to..., by demographics,

Figure 104: Target – Activities done – I follow/like the brand on social media because...., by demographics, October 2014

Figure 105: Target – Activities done – I have researched the brand on social media to...., by demographics, October 2014

Figure 106: Amazon.com - Activities done - I have looked up/talked about this brand online on social media..., by demographics,

October 2014

Figure 107: Amazon.com – Activities done – I have contacted/interacted with the brand online on social media to..., by demographics,

Figure 108: Amazon.com - Activities done - I follow/like the brand on social media because...., by demographics, October 2014

Figure 109: Amazon.com - Activities done - I have researched the brand on social media to...., by demographics, October 2014

Figure 110: Staples – Activities done – I have looked up/talked about this brand online on social media..., by demographics,

October 2014
Figure 111: Staples – Activities done – I have contacted/interacted with the brand online on social media to..., by demographics,

October 2014
Figure 112: Staples – Activities done – I follow/like the brand on social media because...., by demographics, October 2014

Figure 113: Staples - Activities done - I have researched the brand on social media to...., by demographics, October 2014

Figure 114: Macy's - Activities done - I have looked up/talked about this brand online on social media..., by demographics, October 2014
Figure 115: Macy's – Activities done – I have contacted/interacted with the brand online on social media to..., by demographics,

Figure 116: Macy's – Activities done – I follow/like the brand on social media because...., by demographics, October 2014

Figure 117: Macy's - Activities done - I have researched the brand on social media to...., by demographics, October 2014

Appendix - Trade Associations