

## Back to School Shopping - US - January 2017

Report Price: £3239.54 | \$3995.00 | €3796.74

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



With planned BTS (back-to-school) shopping reaching almost \$76 billion in 2016, the season is a vital opportunity for retailers to connect with young shoppers, build relationships, and introduce new products.

This report looks at the following areas:

- Market tends to be cyclical and consumers uncertain in post-election landscape
- Little growth in school-age population and stagnant enrollment challenges market

While challenges to the BTS market include limited growth in family household incomes and stagnant school enrollment, the vast majority of college students and parents with school-age kids participate in back-to-school shopping. Digitally savvy shoppers have been embracing BTS omni-channel retailing and using a range of traditional and online tools to shape their purchasing choices. Opportunities lie in meeting consumer interest in innovations that can make BTS shopping easier, more efficient, more customized, and more fun.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto: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

# Back to School Shopping - US - January 2017

Report Price: £3239.54 | \$3995.00 | €3796.74

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

## Table of Contents

### Overview

What you need to know  
Definition

### Executive Summary

The issues  
Market tends to be cyclical and consumers uncertain in post-election landscape  
Figure 1: Total planned US back-to-school (K-12 and college) spending, at current prices, 2011-16  
Little growth in school-age population and stagnant enrollment challenges market  
The opportunities  
Digitally savvy BTS shoppers fuel growth for omnichannel and online retailers  
Figure 2: Select retailers used for back-to-school shopping, in-store and online – Parents, October 2016  
Figure 3: Select retailers used for back-to-school shopping, online and in-store, college students, October 2016  
Many points of entry, as BTS shoppers take into account multiple influencers  
Figure 4: Select back-to-school shopping influencers, parents and college students, October 2016  
BTS shoppers eager for time-saving innovations, omnichannel features, free shipping  
Figure 5: Desired improvements to back-to-school shopping – Parents, October 2016  
Figure 6: Desired improvements to back-to-school shopping – College students, October 2016  
What it means

### The Market – What You Need to Know

2016 BTS market shows strong growth, but this is largely cyclical  
BTS shoppers and their kids are increasingly diverse  
Digitally engaged generations make up the core of BTS shoppers

### Market Size

Planned back-to-school spending grows in 2016, a “stock up” year  
Figure 7: Planned back-to-school (K-12) spending, in current dollars, 2011-16  
Back-to-college planned spending reaches \$48.5 billion in 2016  
Figure 8: Planned back-to-college spending, in current dollars, 2011-16

### Market Factors

Macroeconomic factors show stronger outlook  
Figure 9: Consumer confidence and unemployment, 2000-September 2016  
Slow rise in household income and high expenses still squeeze families  
Figure 10: Median household income, in inflation-adjusted dollars, 2005-15  
Rising costs associated with raising kids also squeeze families  
Figure 11: Cost to raise a child from birth to age 18 for middle-income families, by share of expense, 1993 vs 2013  
Tight school budgets can mean more is demanded of families  
Tax-free holidays support BTS, can shape timing of promotional activity

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Back to School Shopping - US - January 2017

Report Price: £3239.54 | \$3995.00 | €3796.74

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

Population growth among kids, teens, and young adults stagnates

Figure 12: US population under age 24, by age, 2012-22

School enrollment is essentially flat, college enrollment in decline

Figure 13: US school enrollment, 2011-15

More kids, parents, and college students are racially diverse

Figure 14: Population by race and Hispanic origin, 2012-22

## Market Perspective

Digitally engaged generations represent growing share of population

Changes and opportunities as schools integrate more technology

Figure 15: Desktop and laptop computer ownership (household), April 2015-June 2016

Online courses may transform landscape of higher education

## Key Players – What You Need to Know

Walmart and Target are lead players, building omnichannel presence

Marketing showcases new trends, low prices, and education's value

Traditional department stores struggle to stay relevant

Amazon is the leading online retailer, and a force of innovation

Customization, "kids for kids" product lines, and easy list fulfilment

## What's Working?

Mass merchants lead with one-stop, high-value, omnichannel appeal

Low prices underpin Walmart's lead position, while 2016 ads also evoke other themes

Promoting clothing via "cool" looks for kids and deals for "moms"

Figure 16: Macy's, back-to-school ad featuring dancing in halls, august 2016

Figure 17: Macy's, back-to-school ad for high school students, august 2016

Parents still want to get it "right" and prize school's serious purpose

Figure 18: Office Depot OfficeMax, Get Back to Great project TV ad, July 2016

## What's Struggling?

Traditional department stores struggle to stay relevant

Efforts to reinvigorate include partnerships, one-on-one service, and refreshed merchandising

Value-oriented department stores doing comparatively well

Online commerce is a key bright spot for department stores

## What's Next?

Ongoing innovation and growth in online and in omnichannel retail

Optimizing use of individual and aggregate data

Taking a lead from Amazon's strengths, and innovations

Empowering kids via personalization and "kids for kids" products

Figure 19: Target, Back to School 2016: The Project TV ad, July 2016

Online tools and new apps to make shopping even easier

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Back to School Shopping - US - January 2017

Report Price: £3239.54 | \$3995.00 | €3796.74

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

## The Consumer – What You Need to Know

- Vast majority of parents and college students engage in BTS shopping
- Walmart, Target, and Amazon stand out as top retailers
- Clothing leads for K-12 shoppers, supplies for college shoppers
- Parents seek balance of price and quality, weigh range of influencers
- Free shipping and more time-saving measures widely sought

## Participation in Back-to-School Shopping – K-12

- Almost all parents do at least some back-to-school shopping  
Figure 20: Participation in back-to-school shopping, October 2016
- Parents aged 35+ more likely to participate in back-to-school shopping  
Figure 21: Participation in back-to-school shopping, by gender and age, October 2016
- Participation is fairly high across household income brackets  
Figure 22: Participation in back-to-school shopping, by household income, October 2016
- Hispanic parents lead BTS shopping for 2016-17 school year  
Figure 23: Participation in back-to-school shopping, by race and Hispanic origin, October 2016

## Participation in Back-to-School Shopping – College

- Virtually all college students make back-to-school purchases  
Figure 24: Participation in back-to-school shopping – College students, October 2016
- Living situation shifts as students advance through school  
Figure 25: Participation in back-to-school shopping, 2016-17 school year – College students, by current living situation, October 2016
- Lower-income college students less likely to participate  
Figure 26: Participation in back-to-school shopping, 2016-17 school year – College students, by household income, October 2016

## Retailers Shopped for Back-to-School Shopping – K-12

- Virtually all shop for BTS in stores, three quarters also go online  
Figure 27: Retailers shopped for BTS items – K-12, October 2016
- Younger parents favor mass merchandisers; dads choose electronics stores  
Figure 28: Retailers shopped in-store for BTS items, by gender and age, October 2016
- Younger parents, especially dads aged 18-34, favor online shopping  
Figure 29: Retailers shopped online for BTS items, by gender and age, October 2016
- Less affluent stick to Walmart and dollar stores; wealthier visit a wider range  
Figure 30: Retailers shopped in-store for BTS items, by household income, October 2016
- Affluent shoppers embrace online retailers  
Figure 31: Retailers shopped online for BTS items, by household income, October 2016
- Race and Hispanic origin impacts retailer choice for BTS shopping  
Figure 32: Retailers shopped in-store for BTS items, by household income, October 2016  
Figure 33: Retailers shopped online for BTS items, by race/Hispanic origin, October 2016

## Retailers Shopped for Back-to-School Shopping – College

- College students show high usage of Target and Amazon

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Back to School Shopping - US - January 2017

Report Price: £3239.54 | \$3995.00 | €3796.74

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

Figure 34: Retailers shopped for BTS items – College students, October 2016

Female college students favor Target, males look to electronics stores

Figure 35: Retailers shopped in-store for college BTS items, by gender, October 2016

Figure 36: Retailers shopped online for college BTS items, by gender, October 2016

Less-affluent college students turn to Walmart; wealthier ones to Target

Figure 37: Retailers shopped in-store for college BTS items, by household income, October 2016

### Anticipated Spend by Category – K-12

Clothing is top category for back-to-school spending

Figure 38: Anticipated spend by category – Parents, October 2016

Moms expect to spend on clothes, young dads spend on shoes, gadgets, bags

Figure 39: Anticipated spend by category – K-12, by age and gender, October 2016

Less-affluent parents prioritize clothing and basic supplies

Figure 40: Anticipated spend by category – K-12, by household income, October 2016

Blacks anticipate spending on clothing, footwear; Asians on electronics

Figure 41: Anticipated spend by category – K-12, by race/Hispanic origin, October 2016

### Anticipated Spend by Category – College

Supplies, clothing, food, and electronics are priorities for college BTS shopping

Figure 42: Anticipated spend by category – College students, October 2016

Females spend on a wide category range; males focus on electronics

Figure 43: Anticipated spend by category – College students, by gender, October 2016

Less-affluent students spend less on supplies and electronics

Figure 44: Anticipated spend by category – College students, by household income, October 2016

### Attitudes toward Back-to-School Shopping

Parents seek to do it "right," but also to please kids and have fun

Figure 45: Attitudes toward back-to-school shopping – Parents, October 2016

Less-affluent shoppers are more attentive to price, but still want BTS to be fun

Figure 46: Attitudes toward back-to-school shopping – Parents, by household income, October 2016

Older kids have bigger impact on BTS choices

Figure 47: Attitudes toward back-to-school shopping – Parents, by age of child, October 2016

College shoppers reuse items, prioritize price, and set budgets

Figure 48: Attitudes toward back-to-school shopping – College students, October 2016

### Back-to-School Shopping Influencers – K-12

School recommendations and brand familiarity are top influencers

Figure 49: Back-to-school shopping influencers – Parents, October 2016

Gender and age impact influencers that guide BTS choices

Figure 50: Back-to-school shopping influencers, part 1 – Parents, by gender and age, October 2016

Figure 51: Back-to-school shopping influencers, part 2 – Parents, by gender and age, October 2016

Household income shapes influencers for BTS shopping

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Back to School Shopping - US - January 2017

Report Price: £3239.54 | \$3995.00 | €3796.74

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

Figure 52: Select influencers on back-to-school shopping (any rank), by household income, October 2016

Online influencers important to Hispanics

Figure 53: Back-to-school shopping influencers – Parents, by race and Hispanic origin, October 2016

## Back-to-School Shopping Influencers – College

Brand familiarity and coupons are top influencers in college BTS

Figure 54: Back-to-school shopping influencers – College students, October 2016

Deals motivate college-age women; online influencers shape men

Figure 55: Back-to-school shopping influencers – College students, by gender, October 2016

## Desired Improvements to Back-to-School Shopping

Free shipping is widely sought, with time-saving measures also wanted

Figure 56: Desired improvements to back-to-school shopping – Parents, October 2016

Free shipping wanted by over 70% of college BTS shoppers

Figure 57: Desired improvements to back-to-school shopping – College students, October 2016

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

## Appendix – Market

Figure 58: Average household size, by race and Hispanic origin, 2016

Figure 59: Distribution of generations by race and Hispanic origin, 2017

Figure 60: Median household income, by race and Hispanic origin of householder, 2015

Figure 61: Population by generations, 2012-22

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)