



Back-to-School Consumer Pulse Poll
07.07.2015

Methodology

Rubicon Project engaged global polling firm Penn Schoen Berland to conduct 1000 online interviews (MOE $\pm 3.1\%$) among parents of children in grades K-12 and in college in the US between June 12 and 15, 2015.

Key Findings

- **WHAT THEY ARE BUYING:**
 - **The average parent plans to spend an average of \$873 on their grade school child this back-to-school season – for college students, they plan to spend an average of \$1,124. 56% of parents say that’s more than last year.**
 - Parents plan on buying technology (72%) the most during back-to-school shopping, followed by apparel/retail items (61%) and school supplies (50%)
 - But even in a technology-driven world, some things don’t change. While parents are most concerned with buying the basics like school supplies (46%), parents believe children are more focused on obtaining apparel/retail items (47%)
 - Nearly 2 in 5 parents say they will be purchasing technology this back-to-school season specifically to meet classroom needs/requirements
 - The average parent estimates **close to \$400 worth** (\$390) on technology alone – followed by apparel/retail (\$278) and mobile devices (\$242)
 - Even though 50% of K-8 children currently have a tablet, 44% of parents plan to purchase one for their K-8 child in preparation for the upcoming school year
 - More parents in the South are buying tablets this year (58%); fewer in the Midwest (29%)
 - One quarter of all parents with school age children plan to re-evaluate their mobile plan during the back-to-school period – 44% of families with college students will re-evaluate theirs

- **HOW THEY ARE BUYING:**
 - **Parents are the ultimate decision makers when it comes to where to shop**
 - Parents control *where* they shop, with 4 in 5 parents making that choice, but most (73%) take their child along with them for in-store decisions on *what* to purchase
 - Moms take the lead on most back-to-school decision making, with over half saying mom leads across all categories

- **While in-person shopping is still the most popular option, online-only shopping is popular for technology and telecommunications**
 - 31% of parents plan on shopping for technology both online and in-person, while 26% of parents plan to do the same for telecommunications
 - Just over one third of parents (31%) plan on purchasing back-to-school supplies both online and in person
 - 3 in 4 parents would rather shop at large chain stores if it means better deals- Walmart is the top place to buy apparel, technology, and school supplies; Target is second after Walmart for apparel and a distant second for school supplies, while Amazon is a top destination for technology
 - 75% of parents make online purchases monthly - half of college parents making them at least weekly
- **Discounts are driving parents' back-to-school shopping and nearly a quarter have already begun**
 - Most parents (61%) say store sales and promotions are the top determinate of when they conduct their back to school shopping
- **Despite efforts to save, 56% of parents plan on spending more money per child on back-to-school shopping this year than last**
 - Parents plan to spend more money this year mostly on technology (72%) and mobile devices (72%)
 - Although parents plan to spend more money this year in every category (72% on technology; 72% on mobile devices; 70% on telecommunications; 61% on apparel/retail; 50% on school supplies; 50% on food and beverage)
 - The average K-12 parent spends \$873 on back-to-school shopping per child
 - Parents in the South are spending an average of \$1,028 per grade school child – the highest regional spend, which is potentially driven by their tablet purchased
- **College parents estimate a higher cost for back-to-school supplies, the majority of which will be spent by them**
 - The average college parent will spend \$1,124 per child this back-to-school shopping season
 - Most parents of college age children pay for back to school shopping (72%), but a little over a quarter of college students (28%) are paying for their own supplies
 - Laptops are the most popular technology purchase for college parents with 52% planning on getting their college student a new one during back-to-school shopping – tablets are the second most popular (46%)
- **HOW TO REACH THEM:**
 - **Parents are best reached through the internet during their mid-morning or evening browsing times**
 - 40% of all parents do their overall online shopping in the early to late evening (8pm-12am), while 20% do their shopping in the mid-morning (9am-11am)
 - **Nearly half (47%) of parents spend more time online than watching TV**
 - **They love video content** - more than half (51%) of all parents watch multiple online videos weekly – nearly one quarter (24%) of college parents watch multiple online videos daily
 - 21% of parents watch videos via online streaming services a few times a week

- 29% of parents watch streaming video (Netflix) and online video (YouTube) daily
- **Digital ads can shape their purchasing decisions** - One quarter have clicked on a digital ad in the past week – and nearly 2 out of 10 parents have made a purchase in the past week based on the ad
 - More than a quarter (26%) of college parents have clicked on an ad within the past day - 24% of college parents have made a purchase in the past 24 hours based on a mobile ad
- **And many are purchasing on-the-go** - 36% of all parents say they've made purchases directly from their mobile device more than once in the past month – while more than one in ten parents of college students make mobile purchases daily

Data

When back-to-school shopping this year, how much money do you plan to spend in total on each child who is entering the following grade(s)? Showing Mean \$ Amount	All n= 1000	Northeast N=277	South N=236	Midwest N=274	West N=213
Kindergarten – 12th grade	\$873	\$932	\$1,029	\$612	\$959
College Student	\$1,124	\$1,063	\$1,581	\$565	\$1,264

How much money do you plan to spend this year on your child who is entering ## INSERT QGRADE ## when back-to-school shopping in each of the following categories? Showing Mean \$ Amount

	All	K-8 Parent	9-12 Parent
Technology (tablets, laptops, desktops, music player, etc.)	390	371	407
Apparel/Retail (clothes, shoes, etc.)	278	253	304
Mobile devices (cell phones)	242	242	241
Telecommunications (phone plans, internet package, etc.)	206	201	211
School supplies (pens, paper, binders, notebooks, backpacks, calculators, etc.)	127	135	118

This year, do you plan to spend more or less money on your child who is entering {#QGRADE} than you did last year when back-to-school shopping in each of the following categories?

	All			K-8 Parent			9-12 Parent		
	I plan to spend more	I plan to spend less	Don't know	I plan to spend more	I plan to spend less	Don't know	I plan to spend more	I plan to spend less	Don't know
Technology (tablets, laptops, desktops, music player, etc.)	72	13	15	75	15	10	69	12	19
Mobile devices (cell phones)	72	17	11	82	13	5	65	20	15
Telecommunications (phone plans, internet package, etc.)	70	15	14	76	13	11	65	18	18
Apparel/Retail (clothes, shoes, etc.)	61	17	23	68	14	18	53	19	28
School supplies (pens, paper, binders, notebooks, backpacks, calculators, etc.)	50	22	27	57	20	23	43	24	32
Food and Beverage (school lunch materials, breakfast materials, etc.)	50	22	28	55	19	25	42	26	32

When back to school shopping this year, will you need to buy technology for your child who is entering {#QGRADE} specifically to meet in-class needs or requirements?

	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495
Yes	38	36	41
No	62	64	59

When back-to-school shopping this year, how much money do you plan to spend in total on each child who is entering the following grade(s)? Showing Mean \$ amount

	All
Kindergarten	495

1st grade	379
2nd grade	292
3rd grade	752
4th grade	464
5th grade	457
6th grade	495
7th grade	470
8th grade	562
9th grade	753
10th grade	673
11th grade	586
12th grade	553
College Freshman	778
College Sophomore	1011
College Junior	1344
College Senior	1305
College 5th year or beyond	237

<i>In total, do you plan to spend more or less money per child than you did last year when back-to-school shopping?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495	College Parent n= 199
I plan to spend more	56	64	48	62
I plan to spend less	17	14	20	14

Which of the following technology items and plans does your child who is entering {#QGRADE} already have? Please select all that apply.	All	K-8 Parent	9-12 Parent
Headphones	51	42	60
Tablet	45	50	40
Mobile phone	44	26	63
Laptop	38	23	54
Music device	31	26	37
Mobile phone plan	30	16	44
Internet plan	23	14	33
Desktop	22	16	27
Camera	20	15	25
None of the above	12	18	6
Other	1	1	1

<i>Which technology items do you plan to purchase when back-to-school shopping this year for your children who are in college or entering {QGRADE}? Please select all that apply. [AMONG THOSE WHO PLAN TO PURCHASE TECHNOLOGY, TELECOMMUNICATIONS OR MOBILE DEVICES]</i>	All n=442	K-8 Parent n=212	9-12 Parent n=230
Tablet	41	44	38
Laptop	37	29	43
Mobile phone	31	28	33
Headphones	25	29	21
Mobile phone plan	24	24	24
Internet plan	17	15	18
Desktop	16	17	15
Music device	14	17	12
Camera	12	14	11
Other	4	2	6

<i>Which technology items do you plan to purchase when back-to-school shopping this year for your children who are in college or entering {QGRADE}? Please select all that apply. [AMONG THOSE WHO PLAN TO PURCHASE TECHNOLOGY, TELECOMMUNICATIONS OR MOBILE DEVICES]</i>	Northeast n=131	South n=105	Midwest n=111	West n=95
Tablet	44	58	29	32
Laptop	37	30	36	44
Mobile phone	32	27	28	36
Headphones	27	26	24	23
Mobile phone plan	29	23	22	20
Internet plan	21	17	15	13
Desktop	16	15	9	23
Music device	19	12	14	12
Camera	11	12	10	18
Other	5	3	6	2

<i>Which of the following best describes you?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495	College Parent n= 199
Our family mobile plan is not typically adjusted during the back-to-school shopping season.	75	74	75	56
I typically reevaluate our family mobile plan during the back-to-school shopping period.	25	26	25	44

<i>In which of the following categories is it most important to YOU to get new items for your child who is entering {#QGRADE} when back-to-school shopping?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495
School supplies (Pens, paper, binders, notebooks, backpacks, calculators, etc.)	46	48	43
Apparel/Retail (clothes, shoes, etc.)	38	37	39
Technology (tablets, laptops, desktops, music player, etc.)	9	7	11

Food and Beverage (school lunch materials, breakfast materials, etc.)	4	5	4
Telecommunications (phone plans, internet package, etc.)	2	1	2
Mobile devices (cell phones)	1	2	1

<i>In which of the following categories is it most important to YOUR CHILD who is entering {#QGRADE} to get new items when back-to-school shopping?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495
Apparel/Retail (clothes, shoes, etc.)	47	46	48
School supplies (Pens, paper, binders, notebooks, backpacks, calculators, etc.)	29	34	24
Technology (tablets, laptops, desktops, music player, etc.)	13	11	15
Telecommunications (phone plans, internet package, etc.)	4	2	7
Mobile devices (cell phones)	4	3	4
Food and Beverage (school lunch materials, breakfast materials, etc.)	3	4	2

<i>Which of the following best describes you?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495	College Parent n= 199
I decide where to go back-to-school shopping	83	91	74	72
My child decides where to shop to back-to-school shopping	17	9	26	28

<i>Which of the following best describes you?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495	College Parent n= 199
I do the majority of back-to-school shopping with my child(ren).	73	69	78	71
I do the majority of back-to-school shopping without my child(ren).	27	31	22	29

Who leads the back-to-school shopping for each of the following categories?	All												College Parent			
	K-8 Parent				9-12 Parent											
	Mom	Dad	Child	Someone else	Mom	Dad	Child	Someone else	Mom	Dad	Child	Someone else	Mom	Dad	Child	Someone else
Apparel/Retail (clothes, shoes, etc.)	67	12	21	1	77	11	12	1	57	12	31	1	55	20	25	0
Technology (tablets, laptops, desktops, music player, etc.)	56	34	8	2	60	34	4	2	51	35	12	2	47	40	14	0
Telecommunications (phone plans, internet package, etc.)	57	36	5	2	61	34	3	2	53	37	7	2	48	43	9	0
Mobile devices (cell phones)	57	33	8	3	61	33	4	2	53	32	12	3	52	38	10	0
School supplies (pens, paper, binders, notebooks, backpacks, calculators, etc.)	69	14	16	1	76	15	9	1	62	14	24	1	63	21	16	0
Food and Beverage (school lunch materials, breakfast materials, etc.)	74	15	10	1	77	16	6	1	70	14	15	1	64	24	12	1

Do you plan to purchase back-to-school supplies in each of the following categories online, or in person at brick & mortar stores? By brick & mortar, we mean the physical location of a store.	All									K-8 Parent			9-12 Parent			College Parent		
	Online			In person			Both			Online			In person			Both		
	Online	In person	Both	Online	In person	Both	Online	In person	Both	Online	In person	Both	Online	In person	Both	Online	In person	Both
Telecommunications (phone plans, internet package, etc.)	17	57	26	20	51	29	14	63	23	23	44	33						
Technology (tablets, laptops, desktops, music player, etc.)	16	53	31	20	47	33	12	59	29	22	44	35						
Mobile devices (cell phones)	14	60	26	16	56	28	12	63	25	19	50	32						
Apparel/Retail (clothes, shoes, etc.)	6	56	38	8	48	45	5	65	30	15	48	37						
School supplies (pens, paper, binders, notebooks, backpacks, calculators, etc.)	6	71	23	7	67	26	5	75	20	15	56	29						
Food and Beverage (school lunch materials, breakfast materials, etc.)	6	80	14	7	77	16	4	83	12	13	65	22						

<i>Which of the following best describes you?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495	College Parent n= 199
I would rather shop at big box or large chain stores if it means I'll get better back-to-school shopping deals.	74	75	73	61
I am willing to spend more money on back-to-school shopping if it means I'm contributing to a small business.	26	25	27	39

<i>This year, do you plan to purchase back-to-school apparel/retail items from any of the following retailers, either online, or in person? Please select all that apply.</i>	All n= 905	K-8 Parent n= 463	9-12 Parent n= 442	College Parent n= 170
Walmart	67	72	61	69
Target	54	59	48	55
Kohls	48	47	48	48
Amazon	47	54	40	52
Old Navy	47	53	40	52
JC Penney	36	34	37	44
Macys	23	20	25	34
Sears	18	17	19	26
Gap	17	20	14	23
Forever 21	15	11	19	24
Abercrombie and Fitch	9	8	9	17
Nordstrom	8	8	7	16
Banana Republic	7	6	8	17
Other	12	13	12	9
Don't know	2	1	3	1

<i>Do you plan to purchase back-to-school technology items at any of the following stores or from any of the following brands? Please select all that apply.</i>	All n= 442	K-8 Parent n= 212	9-12 Parent n= 230	College Parent n= 133
Walmart	61	64	59	56
Amazon	58	65	52	53
Best Buy	51	50	51	49
Target	33	38	30	34
Apple	23	23	22	28
AT&T	22	24	20	32
HP	13	13	13	21
Verizon	12	12	12	18
Sprint	11	10	12	21
Macy's	11	13	9	18
Other	8	7	9	5
Don't know	3	2	5	3

<i>Do you plan to purchase back-to-school supplies from any of the following stores, either online or in-person? Please select all that apply.</i>	All n= 953	K-8 Parent n= 484	9-12 Parent n= 469	College Parent n= 180
Walmart	80	83	76	78

Target	52	57	48	55
Staples	39	36	43	47
Amazon	38	44	31	44
Office Depot	30	29	30	33
Other	8	8	9	8
Don't know	1	1	2	1

<i>What is the top determinant of when you will begin your back-to-school shopping?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495	College Parent n= 199
Store sales and promotions	61	60	62	56
Date of the first day of school	12	13	11	14
When you receive your paycheck	12	12	12	8
Release dates of new/updated products	7	7	6	9
Start date of fall season sports	4	4	4	11
Other	2	2	2	1
None of the above	2	2	3	1

<i>When do you plan to begin back-to-school shopping for your child who is entering QGRADE?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495
One month before school starts	44	44	45
I've already started and will be shopping throughout the summer	23	26	19
Two months before school starts	17	17	16
A week before school starts	12	11	13
Days before school starts	2	1	3
During the first week of school	1	1	2
During the first month of school	1	0	2

<i>Who pays for the majority of back-to-school items for your child or children who are college students?</i>	College Parent n= 199
I pay for the majority	72
My child or children pay for the majority	28

<i>Which technology items do you plan to purchase when back-to-school shopping this year for your children who are in college or entering college? Please select all that apply. [AMONG THOSE WHO PLAN TO PURCHASE TECHNOLOGY, TELECOMMUNICATIONS OR MOBILE DEVICES]</i>	College Parent n=133
Laptop	52
Tablet	46
Mobile phone plan	35
Mobile phone	33
Internet plan	32
Headphones	29
Desktop	20
Camera	20
Music device	17
Other	1
None of the above	7

<i>During what time of day do you typically spend the most time online shopping or conducting online shopping research?</i>	All n=1000	K-8 Parent n=505	9-12 Parent n=495	College Parent n=199
Early morning (5am-9am)	9	11	7	7
Mid-morning (9-11am)	20	24	16	18
Lunchtime/early afternoon (11am-2pm)	14	15	13	20
Late afternoon (2pm-5pm)	16	14	18	16
Evening (5pm-8pm)	23	19	27	26
Late evening (8pm-midnight)	16	15	17	12
Late night (midnight-5am)	2	2	2	1

<i>When was the last time you...?</i>	All n=1000			K-8 Parent n=505			9-12 Parent n=495			College Parent n=199		
	Within the past day	Within the past week	Within the past month	Within the past day	Within the past week	Within the past month	Within the past day	Within the past week	Within the past month	Within the past day	Within the past week	Within the past month
Clicked on an online ad	16	25	16	19	29	15	12	22	18	26	24	20
Clicked on a mobile ad	12	17	12	15	20	12	9	15	13	27	21	12
Made a purchase based on a mobile ad	7	10	14	8	12	16	5	8	12	24	17	11
Made a purchase based on an online ad	7	14	18	9	17	20	6	12	15	21	21	14

<i>How often do you make purchases online?</i>	All n= 1000	K-8 Parent n= 505	9-12 Parent n= 495	College Parent n= 199
Daily	5	6	4	15
Weekly	27	30	23	35
Monthly	43	45	42	35
A few times a year	22	17	28	15
Never	3	2	3	0

<i>How often do you watch online video in each of the following categories? Showing: Through other channels/websites (including YouTube, online news stories, etc.)</i>	All n=1000	K-8 Parent n=505	9-12 Parent n=495	College Parent n=199
A few times a day	15	20	11	24
Once daily	14	17	12	18
A few times a week	22	23	22	20
Once a week	9	8	10	9
A few times a month	11	10	10	14
Monthly	5	4	4	3
Less often than monthly	24	18	31	12

<i>How often do you watch online video in each of the following categories? Showing: Through a streaming service (including Netflix, Amazon Prime, HBOGO, etc.)</i>	All n=100	K-8 Parent n=505	9-12 Parent n=495	College Parent n=199
A few times a day	16	19	14	25
Once daily	13	16	10	17
A few times a week	21	21	21	21
Once a week	7	7	7	7
A few times a month	7	7	7	7
Monthly	3	2	3	3
Less often than monthly	33	29	38	21

<i>On a typical day, do you spend more time online or watching TV?</i>	All n=1000	K-8 Parent n=505	9-12 Parent n=495	College Parent n=199
--	---------------	---------------------	----------------------	-------------------------

I spend more time online than I spend watching TV	47	53	41	52
I spend more time watching TV than I do online	23	19	26	23
I spend equal amounts of time online and watching TV	25	24	26	20
I don't spend significant amounts of time online or watching TV	5	4	6	6

<i>How often do you make purchases online directly from your mobile device (smartphone or tablet)?</i>	All n=1000	K-8 Parent n=505	9-12 Parent n=495	College Parent n=199
Daily	3	4	2	12
Weekly	14	15	13	26
Monthly	19	25	13	16
A few times a year	23	25	21	17
Never	41	31	51	29