



BACK-TO-SCHOOL

1,001 MOMS TALK
BT'S SHOPPING

— 2017 —

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IN-STORE AUDITS



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Back-to-School 2017: Making the Grade

For retailers and brands, back-to-school success hinges in large part on understanding:

1. BTS shoppers and
2. BTS in-store conditions

It takes sufficient knowledge of the market *and* the retail environment to excel during the critical, make-or-break BTS shopping season.

Field Agent's 2017 Back-to-School Report was designed around these two specific needs. Over the next many pages, we offer retail and branded-goods professionals an assortment of insights on BTS shoppers as well as guidance on how to optimize their company's BTS retail execution.

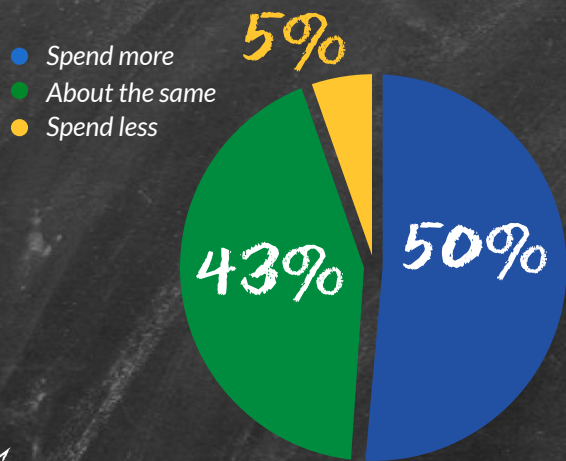
We trust this resource will help prepare your team for the billions in BTS spending about to ensue.



Spending on
BACK-TO-SCHOOL

Compared to last year, will your household likely spend more or less on BTS shopping this year?

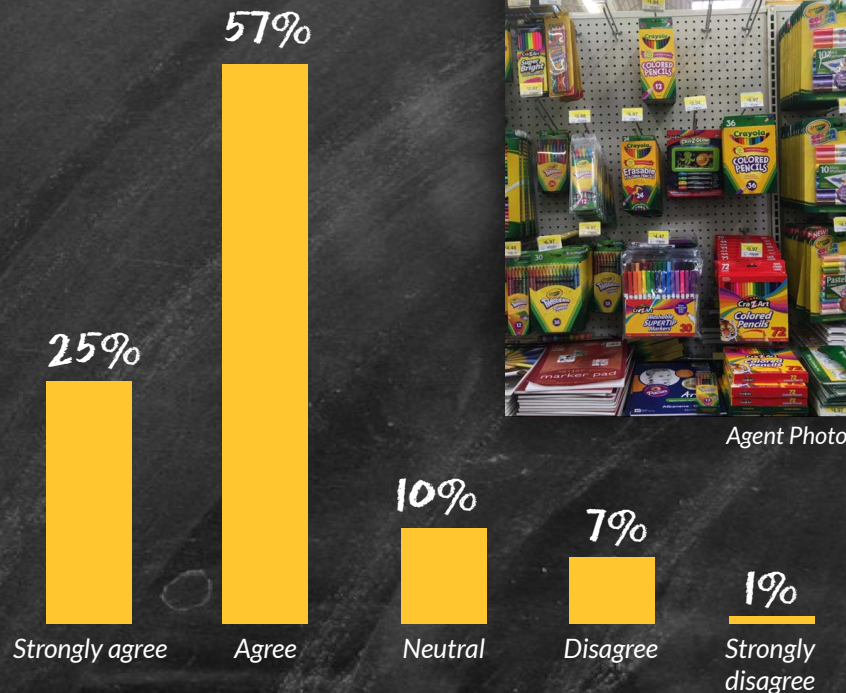
Of those who made BTS purchases last year and plan to again this year (n = 984)



★

 Last Year: **44%** of Moms said their households would spend more on BTS (2016)

To what extent do you agree with the statement, "The back-to-school shopping season is a strain on my personal budget?"



IN-STORE AUDIT

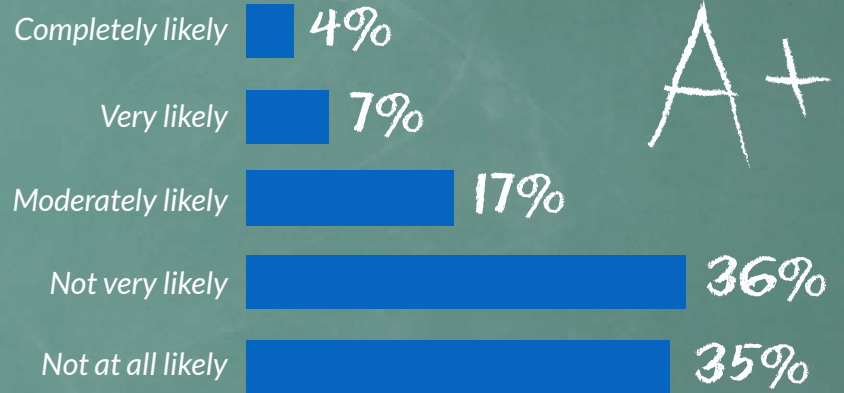


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How closely do you plan to follow a school-provided shopping list when buying school supplies for the 2017-18 school year?



How likely is your family to purchase a pre-packaged school supply KIT for the 2017-18 BTS season?



IN-STORE AUDIT



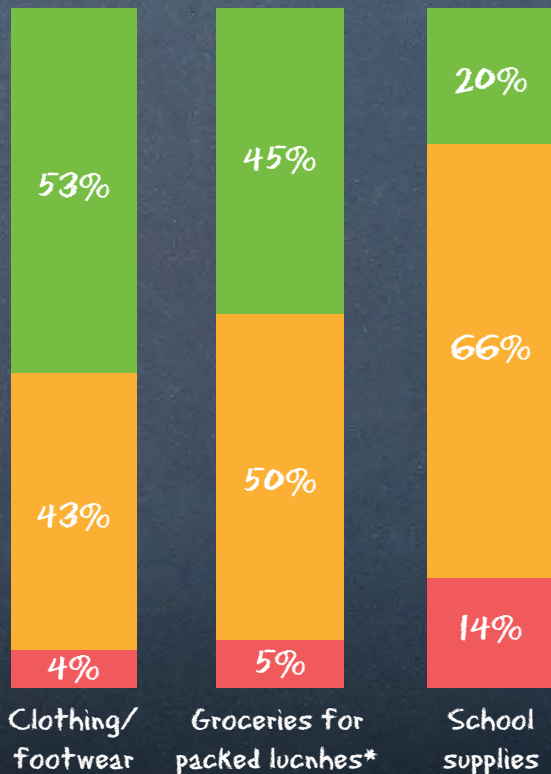
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To what extent do your CHILDREN influence BTS purchases in the following categories?

- Strongly influence
- Somewhat influence
- Do not influence



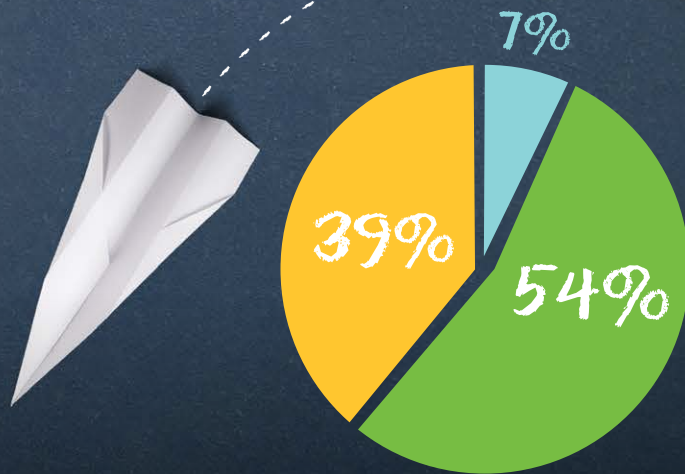
*Among households that pack lunches. (n = 771)



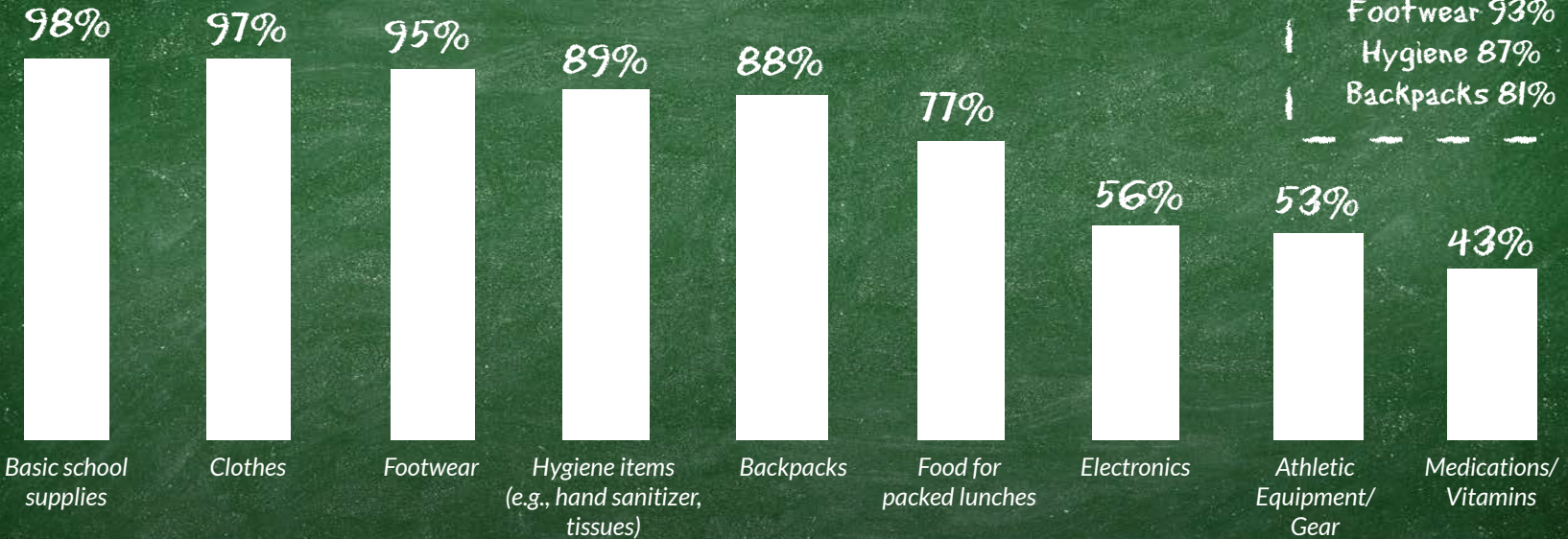
How much of your 2017-18 back-to-school shopping will be done during the sales tax holiday offered by your state or another state?

Among those who live in a state (or have access to a state) that offers tax-free BTS shopping on one or more days (n = 637)

- Will make SOME BTS purchases during tax holiday
- Tax holiday will NOT influence purchases
- Will make all BTS purchases during tax holiday



Which of the following are you likely to purchase for the upcoming new school year?



Last year (2016):
Clothes 96%
Supplies 95%
Footwear 93%
Hygiene 87%
Backpacks 81%





In your own words, what's the most inconvenient or frustrating part of back-to-school shopping?

The themes below were the most prominent among moms' remarks

Low inventory/out of stocks

"Retailers never have enough supplies available. The products shouldn't run out 5 days before school starts. They should run out 5 days after school starts."

Crowds/Lines

"The annoying part is dealing with the crowds. It's always so crowded at stores...the weeks before and after school starts."

Making trips to MULTIPLE stores

"Getting everything I need at good prices at the same time. You really need to shop around."

High Cost

"My children's school list includes brand names. It gets very expensive and I don't have a choice."

ARE YOUR PRODUCTS IN-STOCK THIS BTS SEASON?

Rely on Field Agent OOS Audits

[LEARN MORE](#)



In your own words, what could stores and/or brands do to make back-to-school shopping easier for you?



The themes below were the most prominent among moms' remarks

Keep inventory in-stock

"Have plenty of stock to accommodate the high demand of school supplies."

Bundle supplies by grade/school

"Our stores provide the school list for us but it would be great if they pre-packaged all of those items in one bag for purchase."

More sales/better prices

"Have better sales and try more to compete with competitors to get low prices all in one place."

Keep BTS section organized and clean

"Keep back to school area picked up and restock quickly when an item is out of stock."



Supplying
BACK-TO-SCHOOL

Identify all the RETAILERS from which you'll likely purchase SCHOOL SUPPLIES for Back-to-School 2017-18

IN-STORE AUDIT



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Last year (2016):

Walmart 84%

Target 68%

Dollar Tree 36%

Amazon 33%

Staples 32%

88%
Walmart

65%
Target

36%
Dollar
Tree

32%
Amazon

26%
Dollar
General

24%
Walgreens

23%
Staples

OMNICHANNEL methods moms are moderately likely to use for buying school supplies

In-store pickup 42%

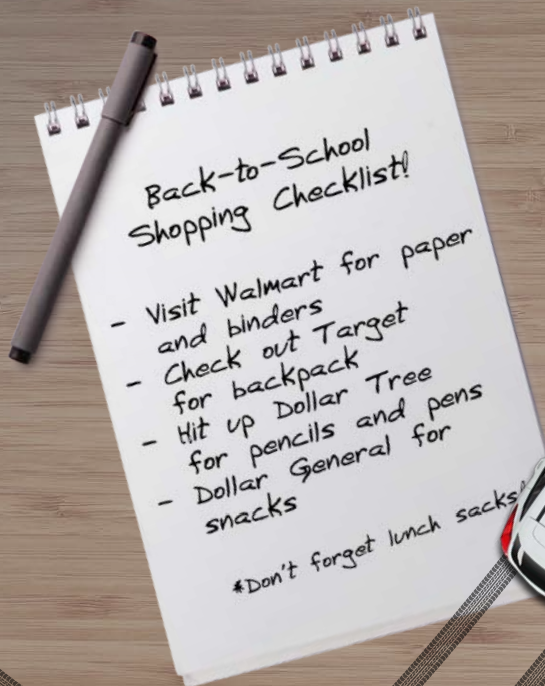
App-based ordering on smartphone 39%

Curbside Pickup 18%

Voice-activated ordering on IPA (e.g., Amazon Echo/Google Home) 11%

Office Depot - 20%, Family Dollar - 17%,
Office Max - 15%, Sam's Club - 14%,
Costco - 14%, CVS - 12%, Kroger 12%,
Other - 7%, Ride Aid - 5%, Publix - 4%,
Meijer - 2%, Albertsons - 2%, Safeway - 1%

How many STORES will your household probably visit to purchase SCHOOL SUPPLIES for Back-to-School 2017-18?



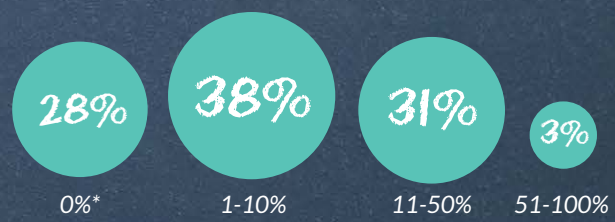
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Approximately what % of school supplies do you estimate your household will purchase ONLINE for Back-to-School 2017-18?

Among those who expect to purchase school supplies (n = 963)

64% Purchased school supplies ONLINE last year (2016);
72% plan to this year (2017)



*Will purchase school supplies but none online

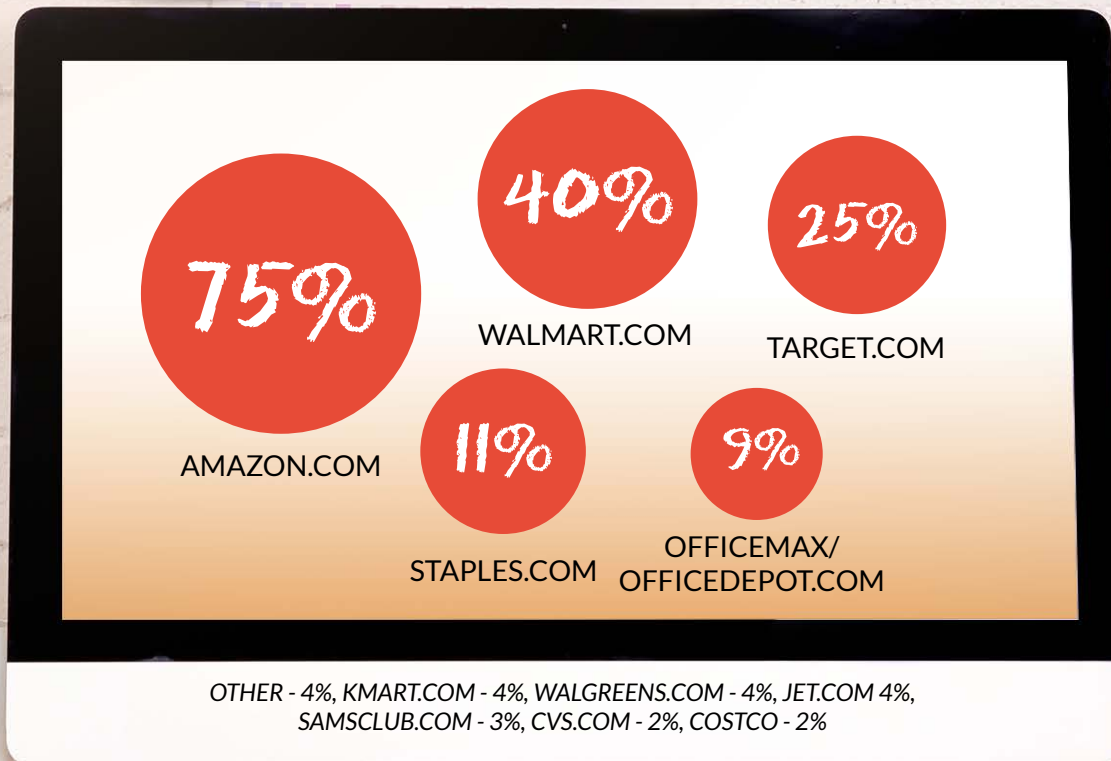
Why don't you and your household purchase school supplies ONLINE?

Among those who do NOT shop for school supplies online (n = 265)

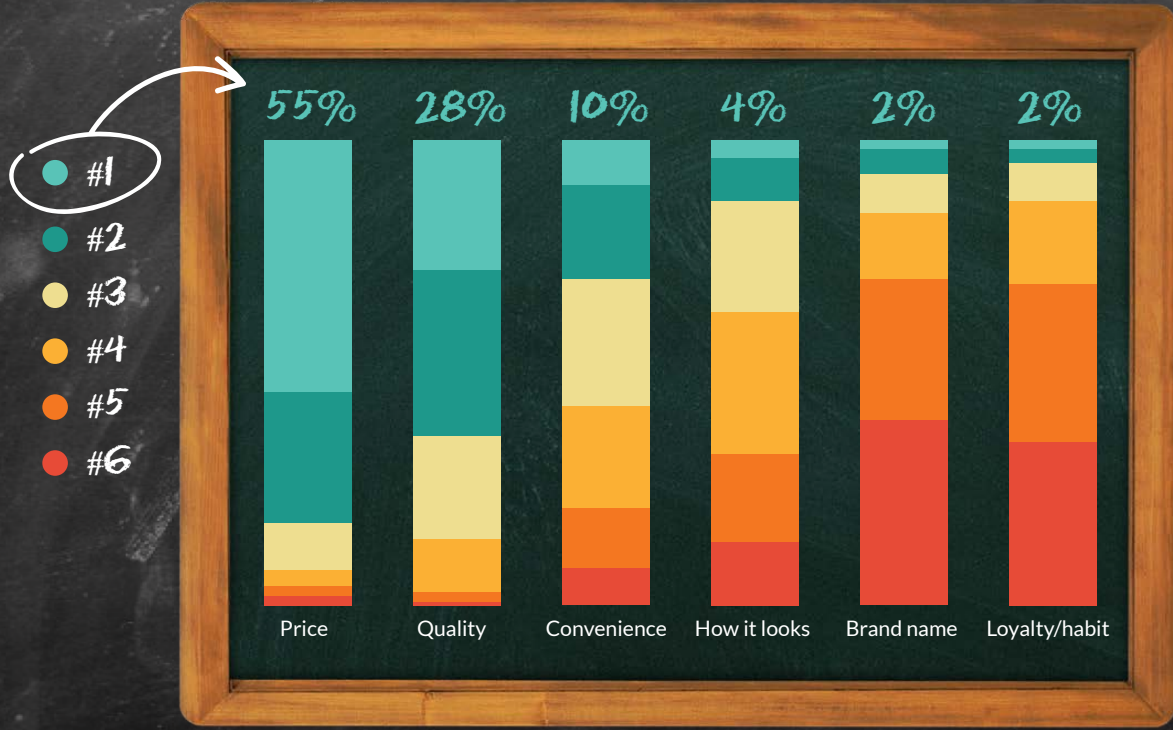


Which ONLINE retailers do you expect to purchase SCHOOL SUPPLIES from for the 2017-18 BTS season?

Among those who buy school supplies online (n = 698)



Where 1 is your highest priority and 6 your lowest, rank what matters most to you when shopping SCHOOL SUPPLIES for your children.



IN-STORE AUDIT



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[SPECIAL SECTION]

BTS Study Guide for
COMPANIES

7 Questions to Help Companies Make an A+ with Back-to-School Shoppers

#1: Are your products actually available in stores?

I know, obvious, right?

Maybe not. According to RIS News, retailers lose a staggering \$93 billion a year to out-of-stocks.

In fact, our own research at Field Agent shows shoppers consider untimely out-of-stocks among their greatest frustrations with shopping for school supplies, clothes, and the like.

At BTS, shoppers are in stores looking for your products.

Are your products actually there? actually available in stores?

#2: Are your products and product displays where they're supposed to be in stores?

Or maybe your products (and product displays) are available, but they're misplaced inside stores. One study found that only 41% of store displays fully complied with company specifications.

Not something you want to overlook during the lucrative BTS shopping season.

#3: Can your would-be customers find your products in stores?

In other words, are your products where shoppers expect them to be? They head to, say, electronics to find that calculator, but it's actually to be found among the other school supplies.

A scary thought: Purchase-ready BTS shoppers can't find your product and, consequently, settle for a rival brand or substitutable product category.

#4: Can shoppers see your products on shelves?

Products are in stores? Check.

Products are in their proper places? Check.

Products can be found? Check.

But can shoppers see them?

Perhaps they're situated too high or low, too far right or left on store shelves. They're in a blind spot, at the worst possible time.

IN-STORE AUDIT



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7 Questions to Help Companies Make an A+ with Back-to-School Shoppers

#5: Is your in-store marketing being properly executed?

You pay a lot for your in-store displays, signs, advertisements, demos, kiosks, and other forms of shopper marketing. Indeed, one source suggests brands spend as much as \$1 trillion shaping the “in-store customer experience” through advertising and other efforts.

So, with BTS around the corner, it’s critical to make sure your POP marketing isn’t just spending money, but that it’s being properly executed by retail partners so it can also make money.

#6: Are BTS shoppers seeing the correct prices on your products?

Shoppers, of course, are incredibly price sensitive. Our own research at Field Agent shows price to be the single most important determinant of BTS purchases—more influential than quality, brand name, or convenience.

Which raises a critical question: Are your products properly priced in stores? A mispriced product can cost you sales now (because shoppers aren’t ready to pay the price they see) and well into the future (because shoppers have the wrong idea about your product).

#7: Do you have a better in-store strategy and execution than your rivals?

Or are competing products simply doing it better?

In short, your products may not be selling because theirs are.

BTS is won by companies with the best retail strategies and, just as important, execution.

Did you answer “No” to Any Questions?



See how Mobile Audits can help you make the grade this BTS season

[DOWNLOAD FREE INFOGRAPHIC](#)

Feeding

BACK-TO-SCHOOL

Which statements describe your children's MEAL/SNACK PLANS for the upcoming school year?



IN-HOME AUDIT

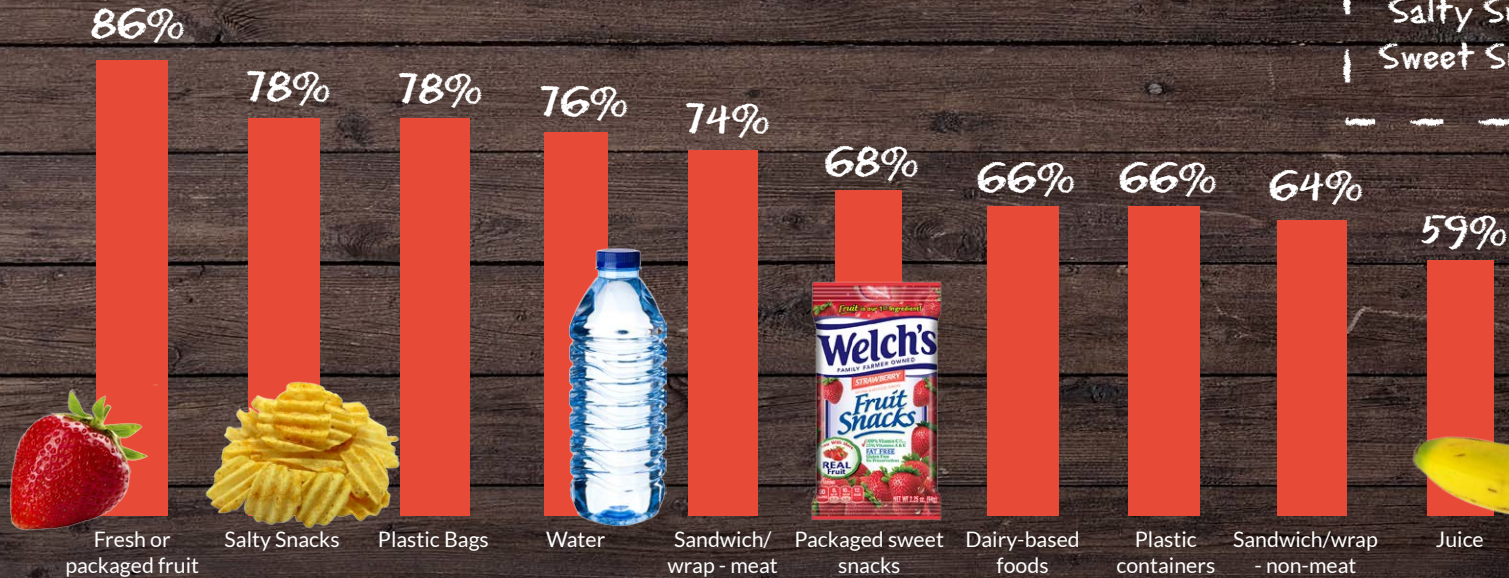


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What will your children's packed lunches most likely contain?

Among those whose kid(s) pack a lunch (n = 667)

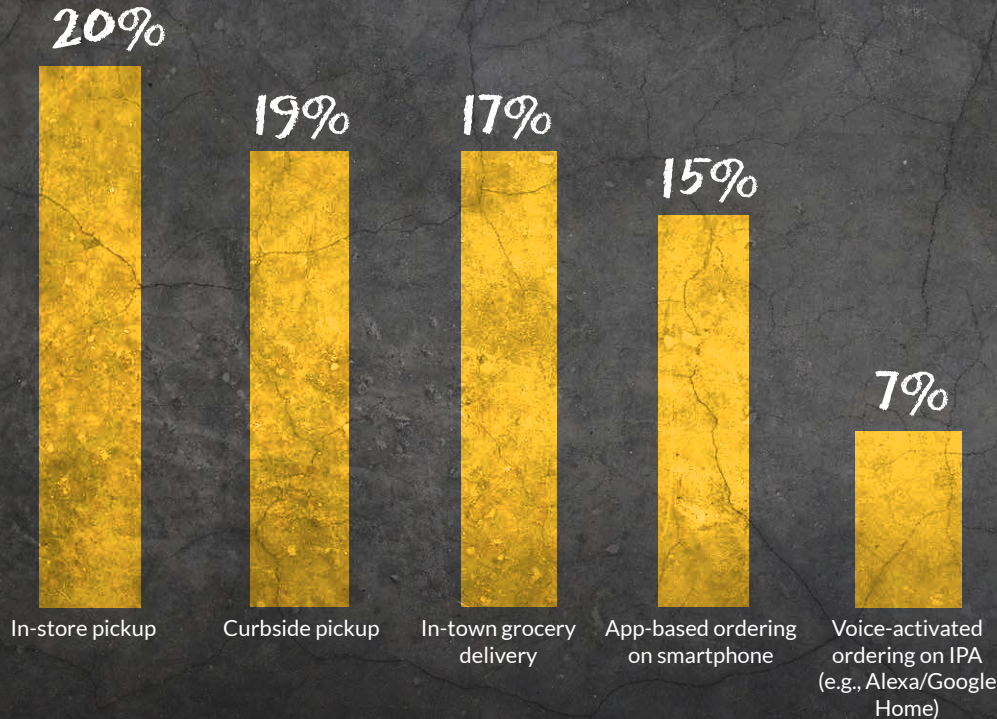


Last year (2016):
 Fruit 89%
 Meat Sandwich 77%
 Water 77%
 Salty Snacks 74%
 Sweet Snacks 68%

Fresh or packaged vegetables - 55%, Nuts or nut-based foods - 48%, Candy or chocolate - 24%, Plastic wrap - 23%, Milk - 17%, Other - 7%, Glass containers - 6%, Soda - 6%

Which of the following methods are you at least MODERATELY LIKELY to use to obtain foods/beverages for your kids' PACKED LUNCHES this new school year?

Among those whose kid(s) pack a lunch (n = 667)



IN-HOME AUDIT

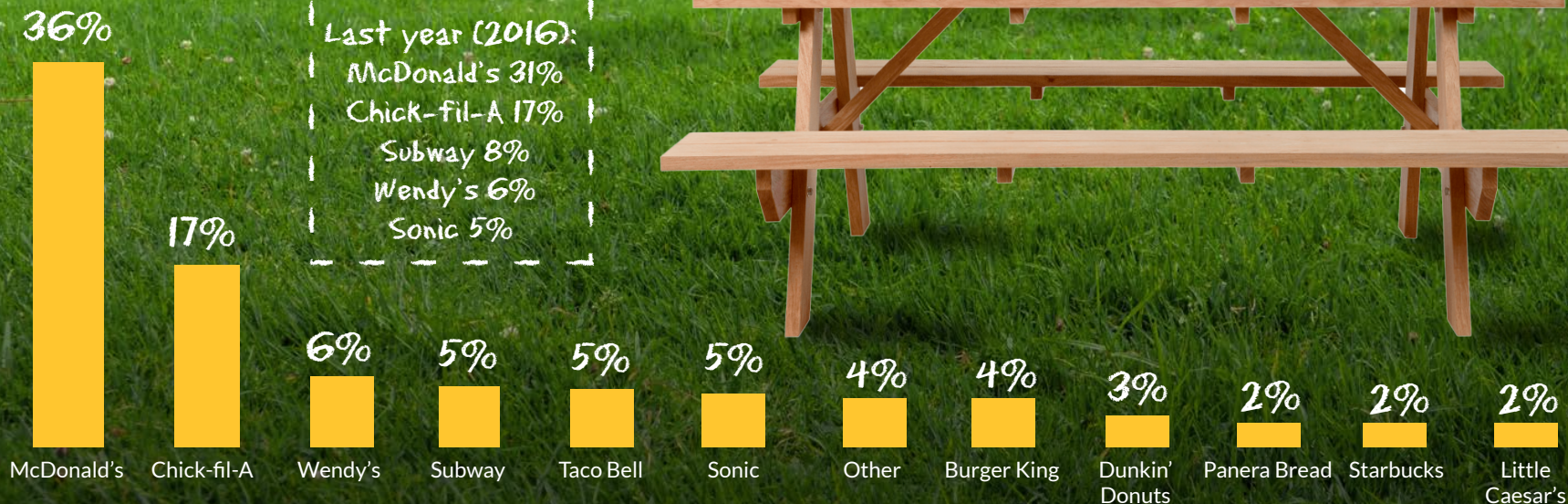


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**PICKUP
HERE**

When you need a quick before-school and/or after-school meal or snack for your kids, which ONE fast food restaurant BEST serves your needs?

Among those who felt the question applied to their household (n = 909)



Jack in the Box - 1%, KFC - 1%, Arby's - 1%, In-and-Out - 1%, Domino's - 1%, Pizza Hut - 1%, Whataburger - 1%, Dairy Queen - 1%, Zaxby's - 1%, Carl's Jr./Hardee's - 1%, Jimmy John's - 1%, Panda Express - 1%, Pappa John's - 1%



Clothing
BACK-TO-SCHOOL

Select all the retailers you will likely purchase CLOTHING from for Back-to-School 2017-18.

Among those who expect to purchase BTS clothing this year (n = 966)



Consignment Stores - 16%, American Eagle Outfitter - 16%, Forever 21 - 16%, Foot Locker - 15%, GAP - 15%, Aeropostale - 14%, Rue 21 - 12%, Costco - 10%, Abercrombie & Fitch - 7%, Dillard's - 7%, Sam's Club - 6%, PacSun - 5%, Polo Ralph Lauren - 4%, Urban Outfitters - 4%, Express - 4%, Lands' End - 3%, Nordstrom - 3%, J. Crew - 3%, The Wet Seal - 2%, American Apparel - 2%, Banana Republic - 2%, Eddie Bauer - 1%, NY&C - 1%

IN-STORE AUDIT



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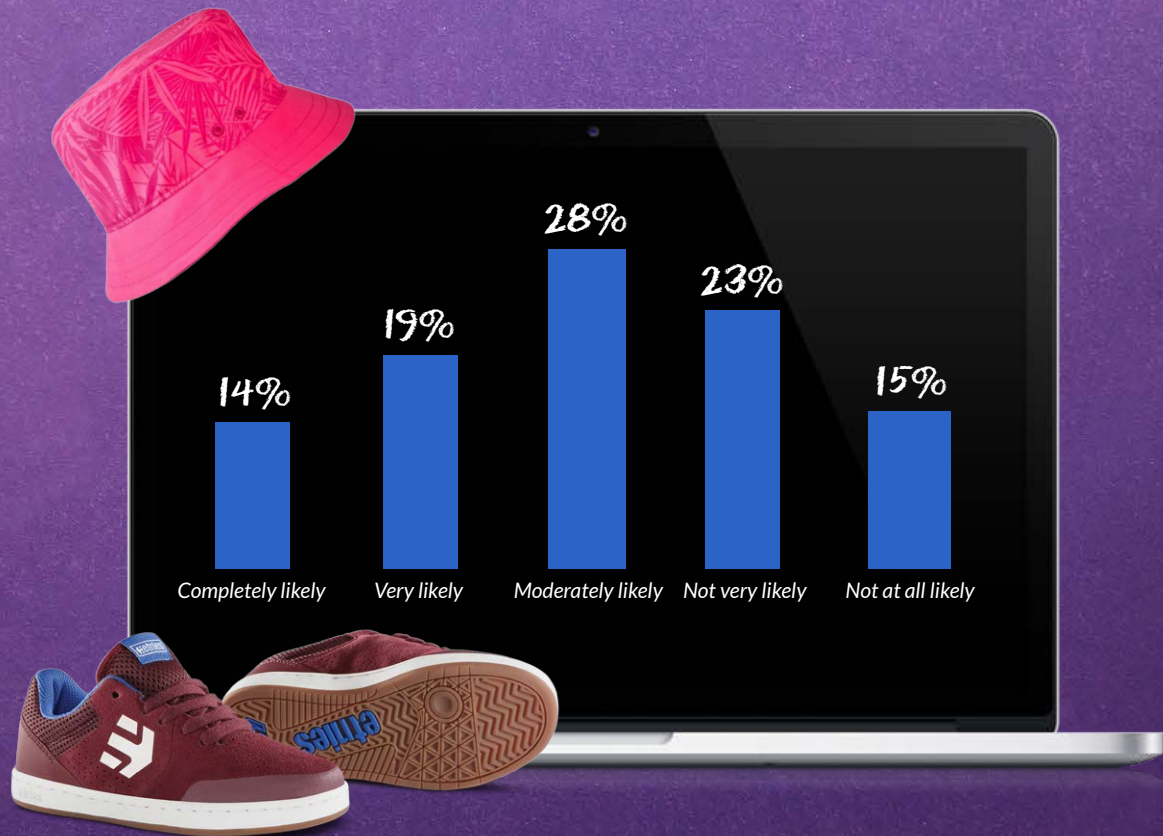
What is the LIKELIHOOD you will purchase clothing/footwear ONLINE for Back-to-School 2017-18?

Among those who expect to purchase BTS clothing this year (n = 966)

IN-STORE AUDIT



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Demographics

Moms of K-12 Children - 100%

Respondent Ages:

- 25-34 - 25%
- 35-44 - 52%
- 45-54 - 20%
- 55-64 - 3%

N = 1,001

Note: All respondents are U.S. residents

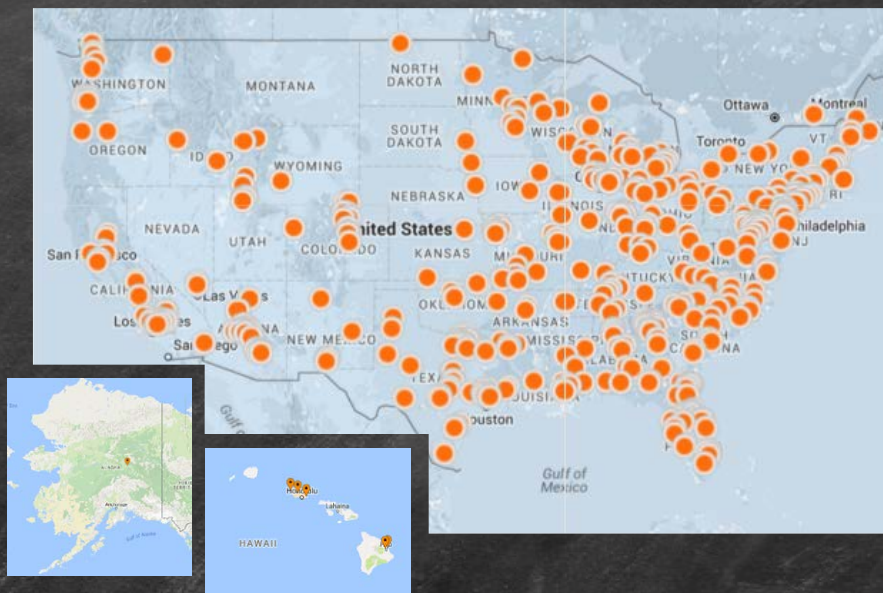
Identify the gender/grade of all the children in your household.

BOYS (Entering into)

- K-2ND GRADES 21%
- 3-5 GRADES 21%
- 6-8 GRADE 19%
- 9-12 GRADES 22%

GIRLS (Entering into)

- K-2ND GRADES 21%
- 3-5 GRADES 20%
- 6-8 GRADES 17%
- 9-12 GRADES 24%



Will at least one of your children attend school OUTSIDE the home for the 2017-18 school year?

Yes - 94%

No - 6%

Note: Field Agent surveyed 501 moms of K-12 children for its 2016 BTS study (cited at various places in this report).

Ask a BTS Question... Get an Instant Answer

“What’s the lowest price of #2 pencils at Dollar General?”

“What does the 3-ring binder section look like at Walmart?”

“Are the Bic pens in-stock at Staples?”

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