

FIELD AGENT

# Back to School

Moms Talk All Things BTS

May 2019



# Studying Up on Back-to-School Shoppers

Quick, which shopping season trails *only* the holidays in terms of gross consumer spending?

That's right. Back to school. The second biggest selling and marketing event of the year. In fact, last year, the National Retail Federation pegged total back-to-school and back-to-college spending at a whopping \$82.8 billion.

Yep, for retailers and brands alike, BTS is *huge*.

With each new school year, Field Agent helps companies make-ready for purchase-minded BTS shoppers by surveying over a thousand mothers of K-12 students. After all, who can forecast a household's BTS spending better than good ol' mom?

The pages to follow document the BTS-shopping attitudes, expectations, behaviors, and even frustrations of 1,349 BTS households—from where moms plan to buy BTS supplies in 2019 to what groceries they intend to include in their kids' packed lunches this year. With over 40 pages of insights, we think you'll find it's a real education.

**Best wishes to you and your company during the 2019 back-to-school shopping season.**

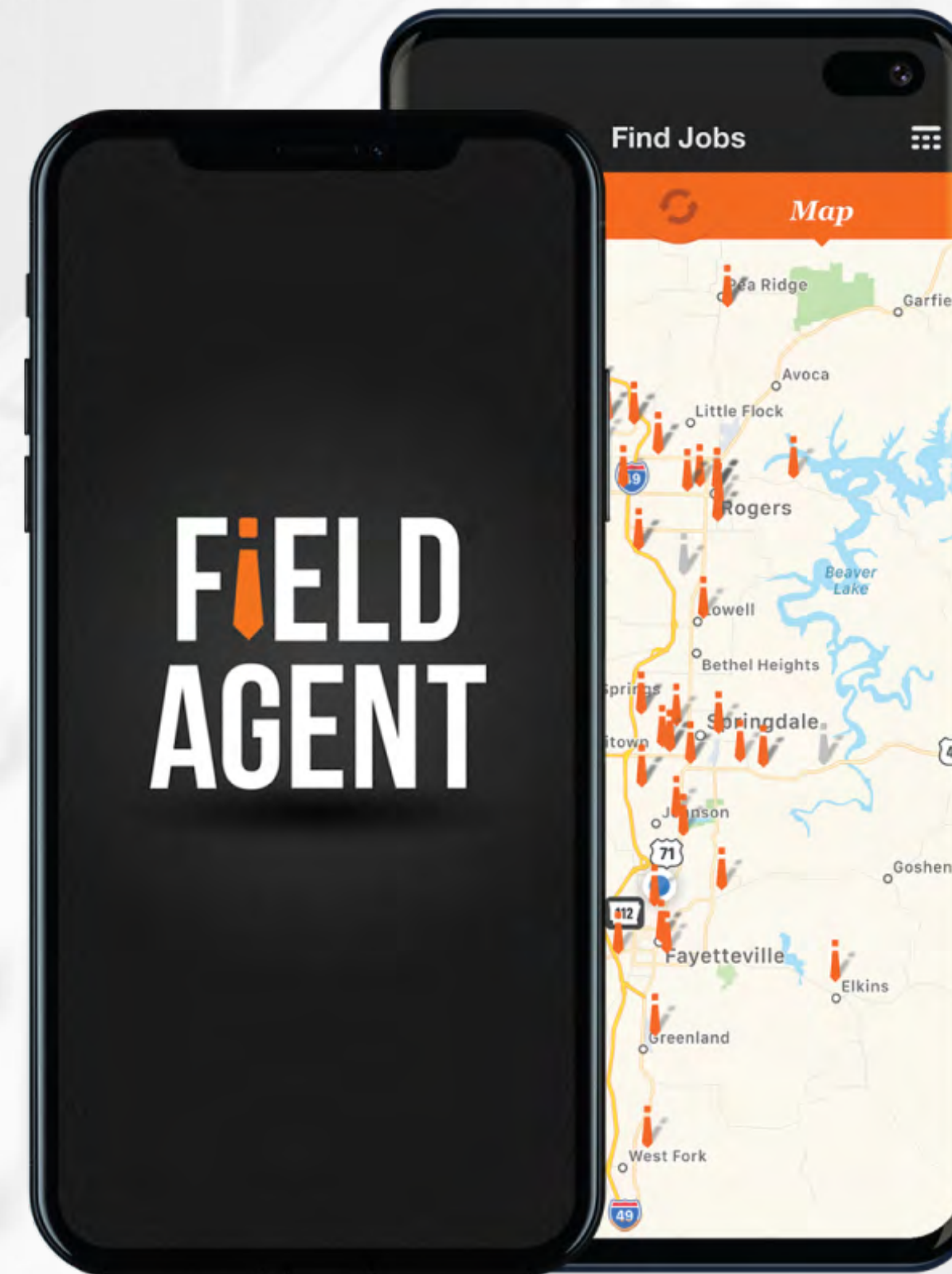




# About Field Agent

Field Agent crowdsources the smartphones of “everyday” shoppers across the United States and six other countries to equip brands, retailers, and other businesses with fast, affordable retail information, shopper insights, and digital product demonstrations.

Our best-in-class retail-auditing, mystery shopping, market research, and influencer-marketing services combine crowdsourcing efficiency with cutting-edge technology to help companies succeed in business.



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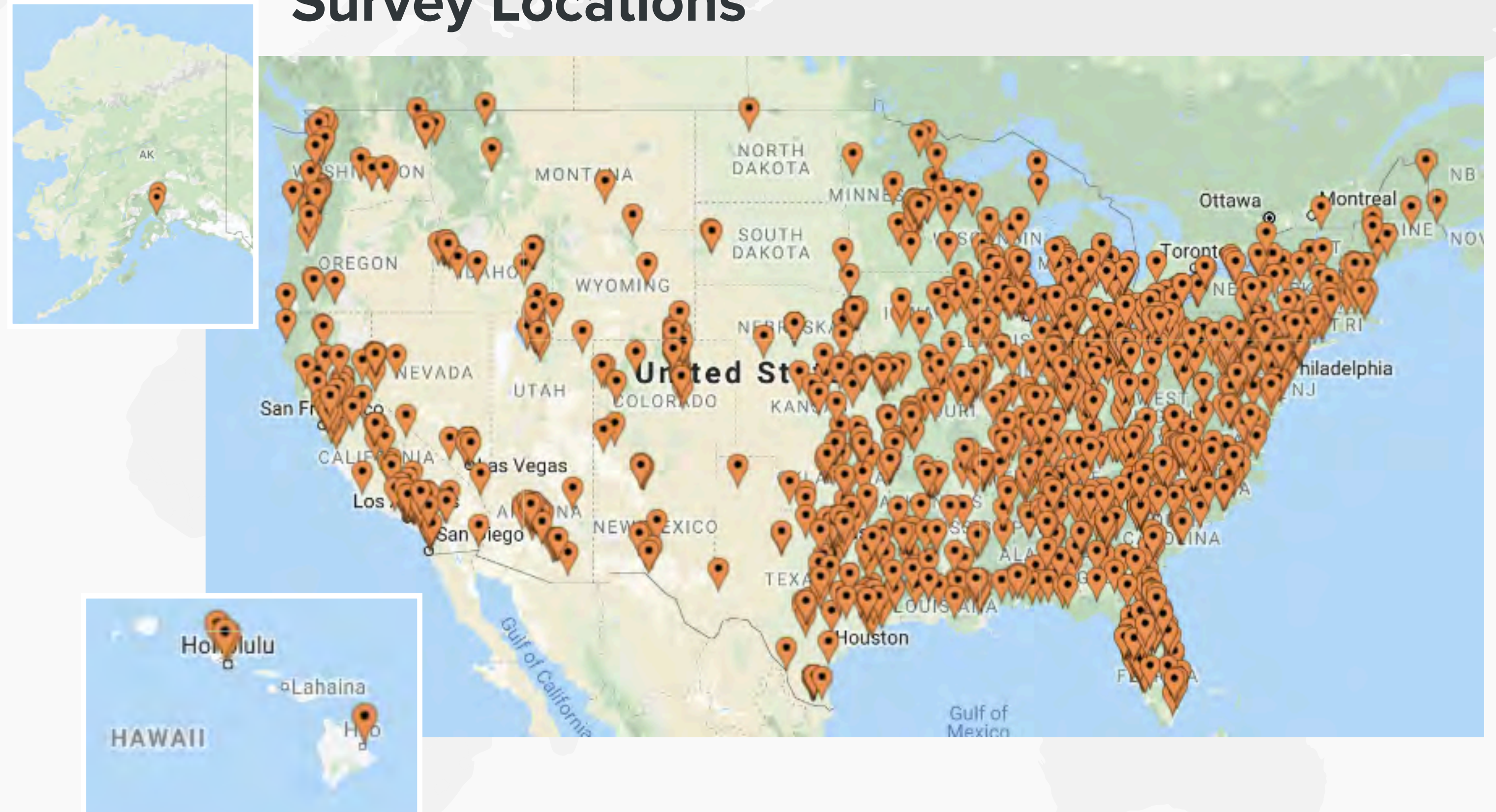


# What We Did

Field Agent surveyed 1,349 moms of children entering K-12 in the fall of 2019. All respondents were U.S. smartphone owners at least 18 years of age. The survey was completed entirely through the Field Agent mobile app, May 6-12, 2019.

**N = 1,349 K-12 MOMS**

## Survey Locations







# Spending on BTS





## **Moms agree:**

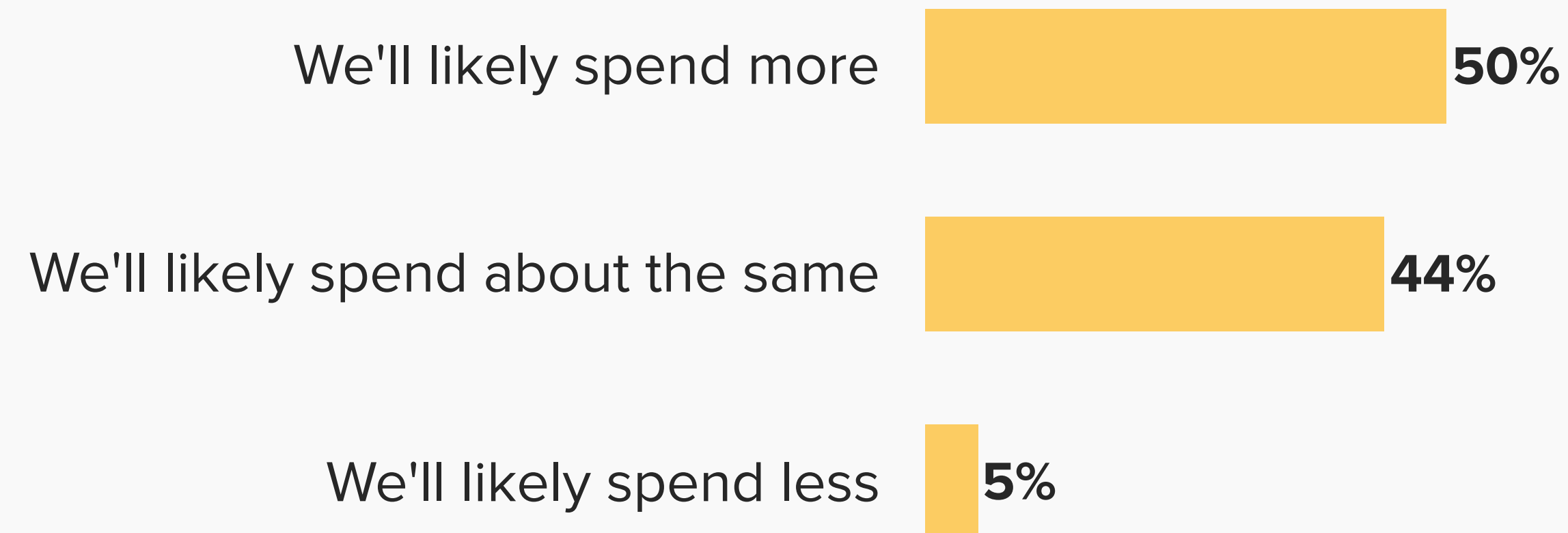
Back-to-School is *hard*. Hard on their budgets, hard on their schedules, hard on their patience.



# Spending, More or Less?

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

Among K-12 Moms who made BTS purchases last year (2018-19) and will again this year (2019-20), n = 1,336



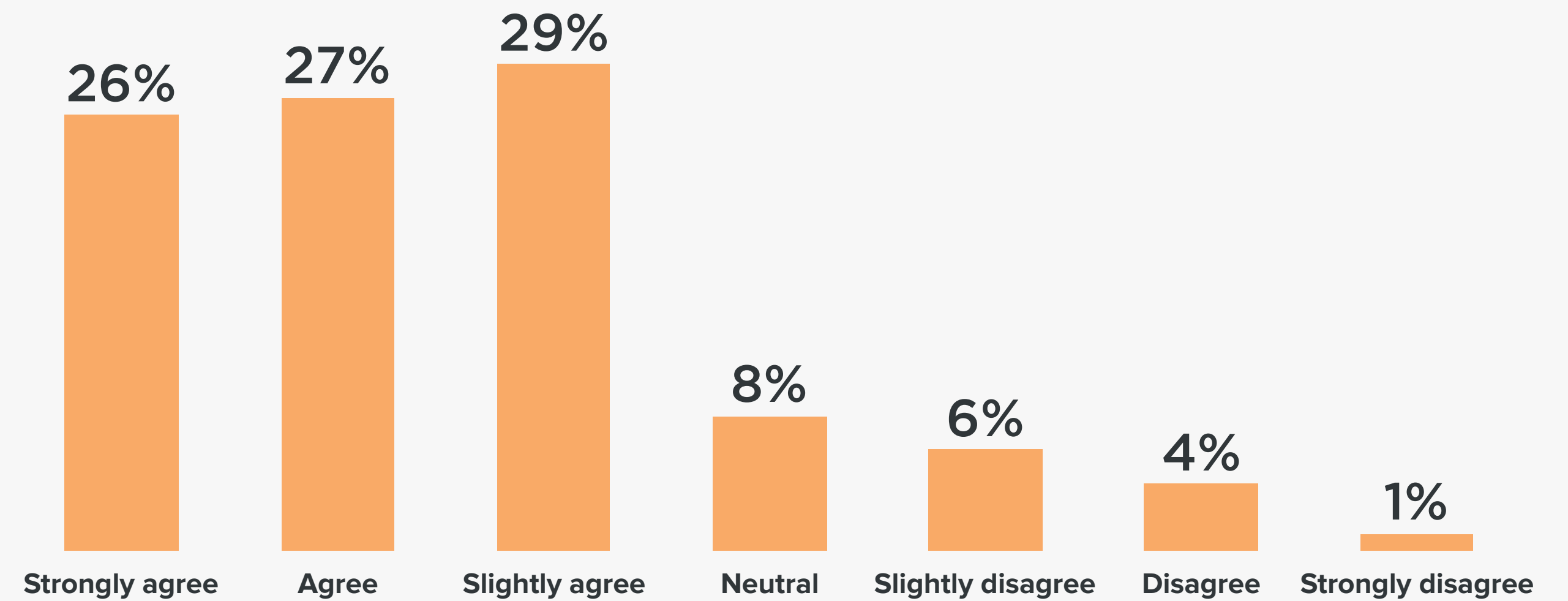
**“We are spending a big chunk of money...”** - Mom Quote





# Budget Strain

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

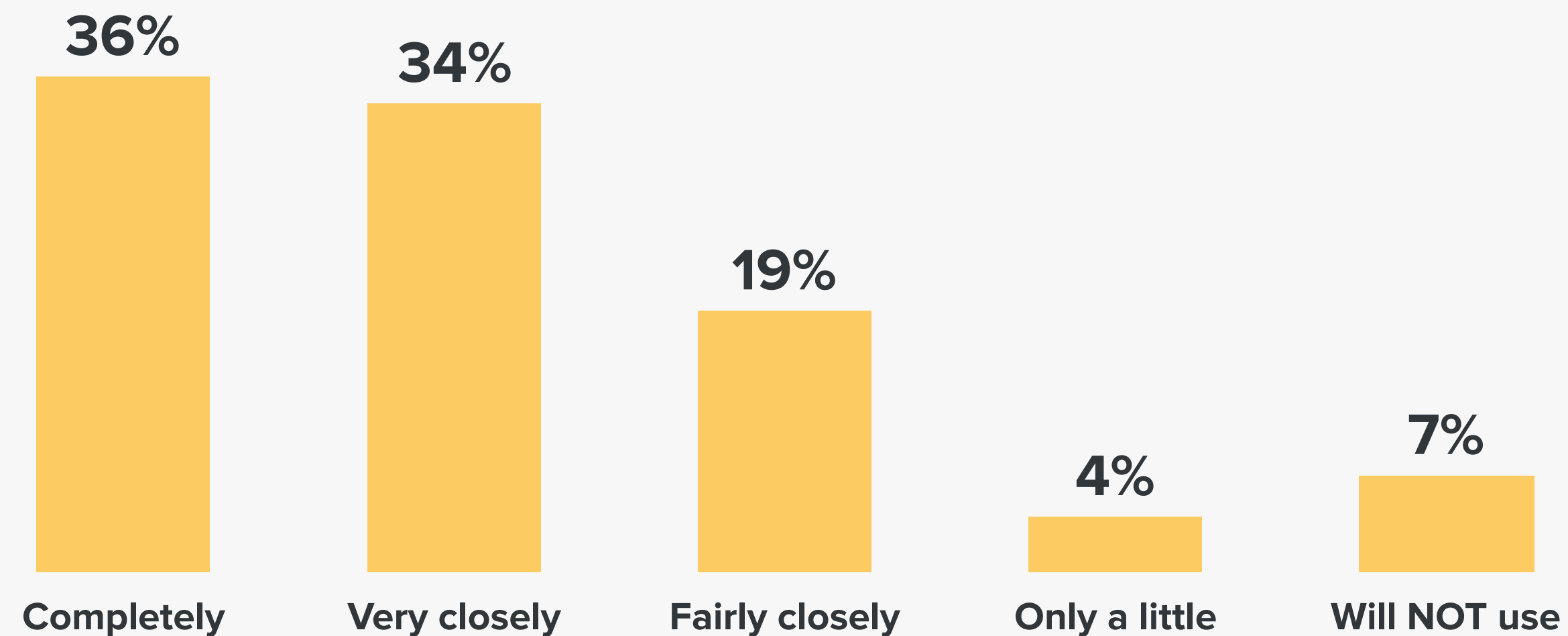


N = 1,349 K-12 Moms



# School Lists

How closely do you plan to follow a school-provided shopping list when buying school supplies for the 2019-20 school year?



N = 1,349 K-12 Moms



*“I have four kids. One is going to Kindergarten, the twins are going to 2nd Grade, and my 11-year-old is going into 6th Grade. I have so many lists...it can be very stressful.” - Mom Quote*

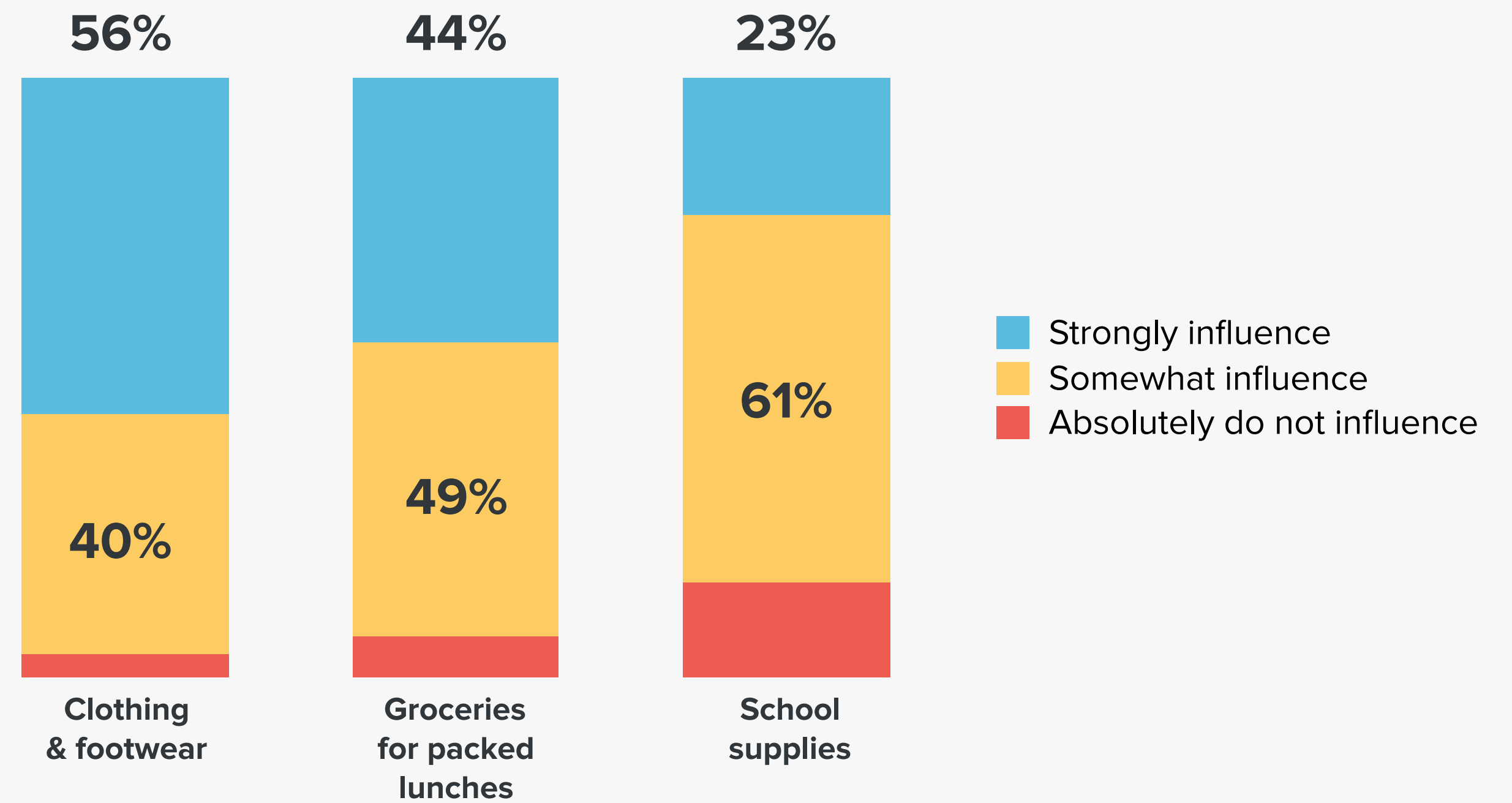




“Getting my kid to decide on a backpack...that is the hard part [about BTS shopping].” - Mom Quote

# Kids’ Influence

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

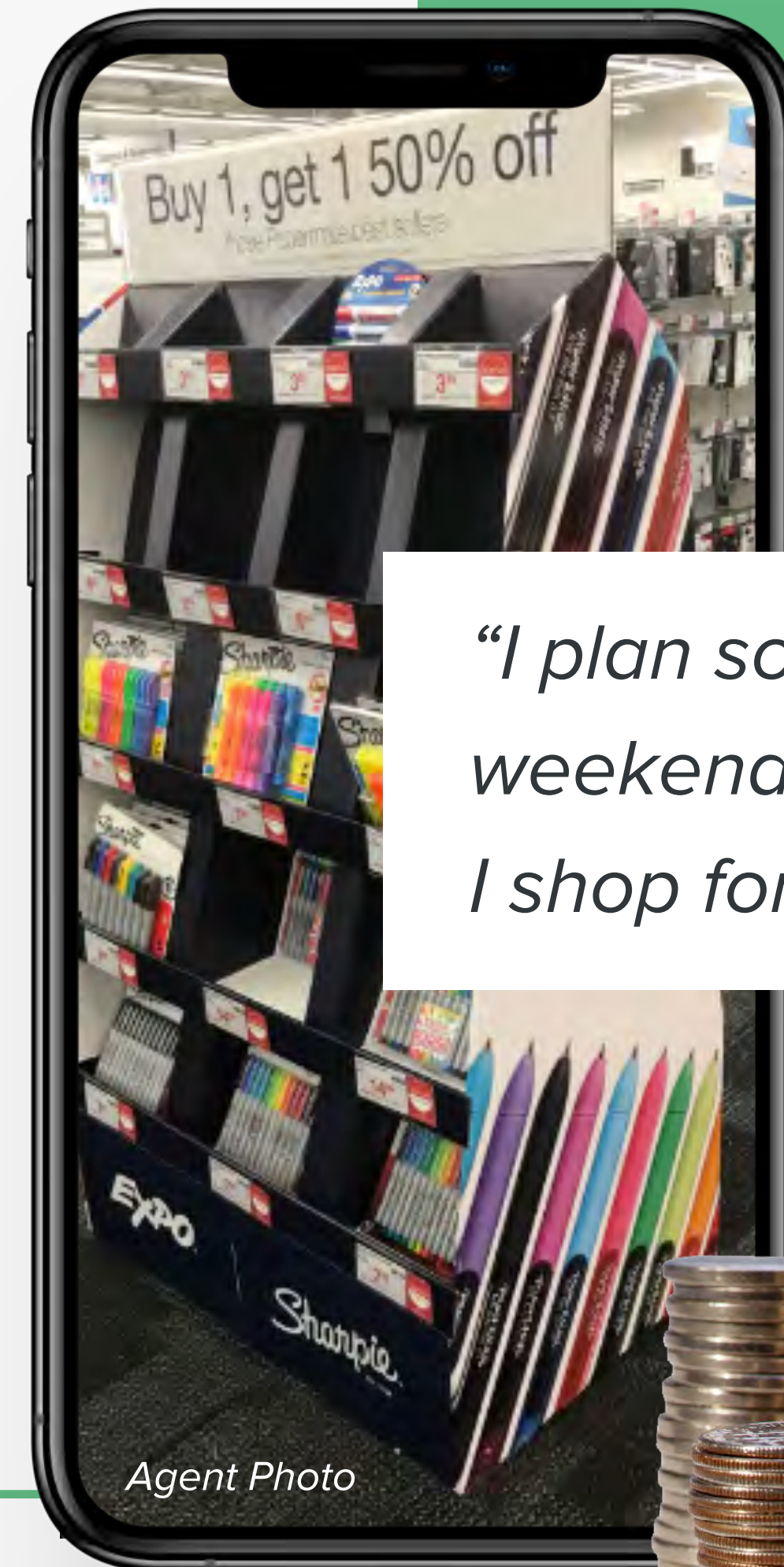
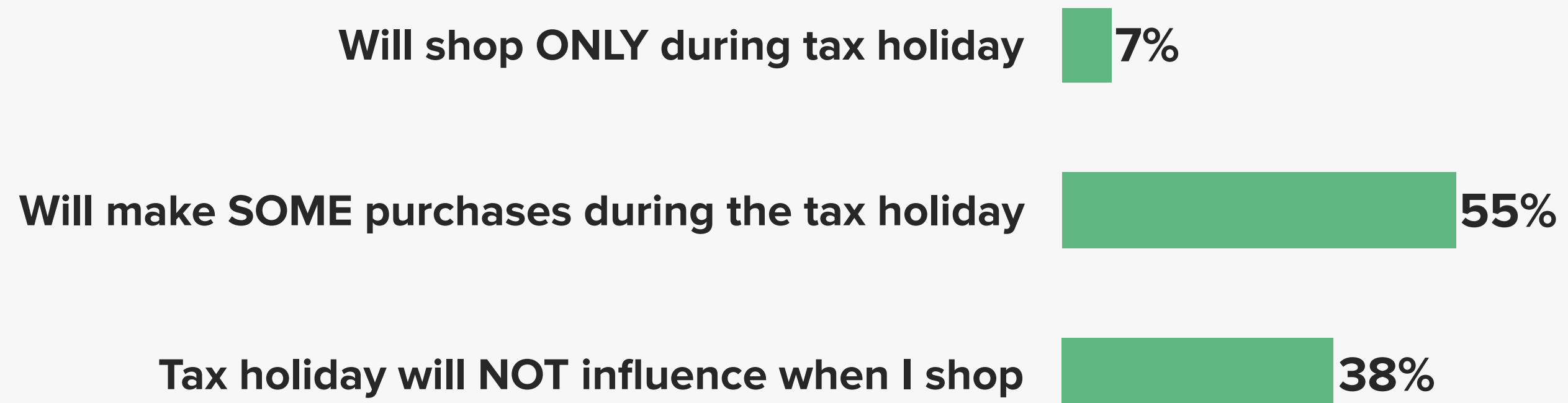


\*Sample size N = 1,349 K-12 Moms except “groceries for packed lunches” (n = 1,250), which some households didn’t feel was applicable.



# Tax-Free Weekend

How much of your 2019-20 back-to-school shopping will be done during the sales tax holiday offered by your state or another state?



*“I plan so that tax-free weekend is the last time I shop for supplies.” - Mom Quote*



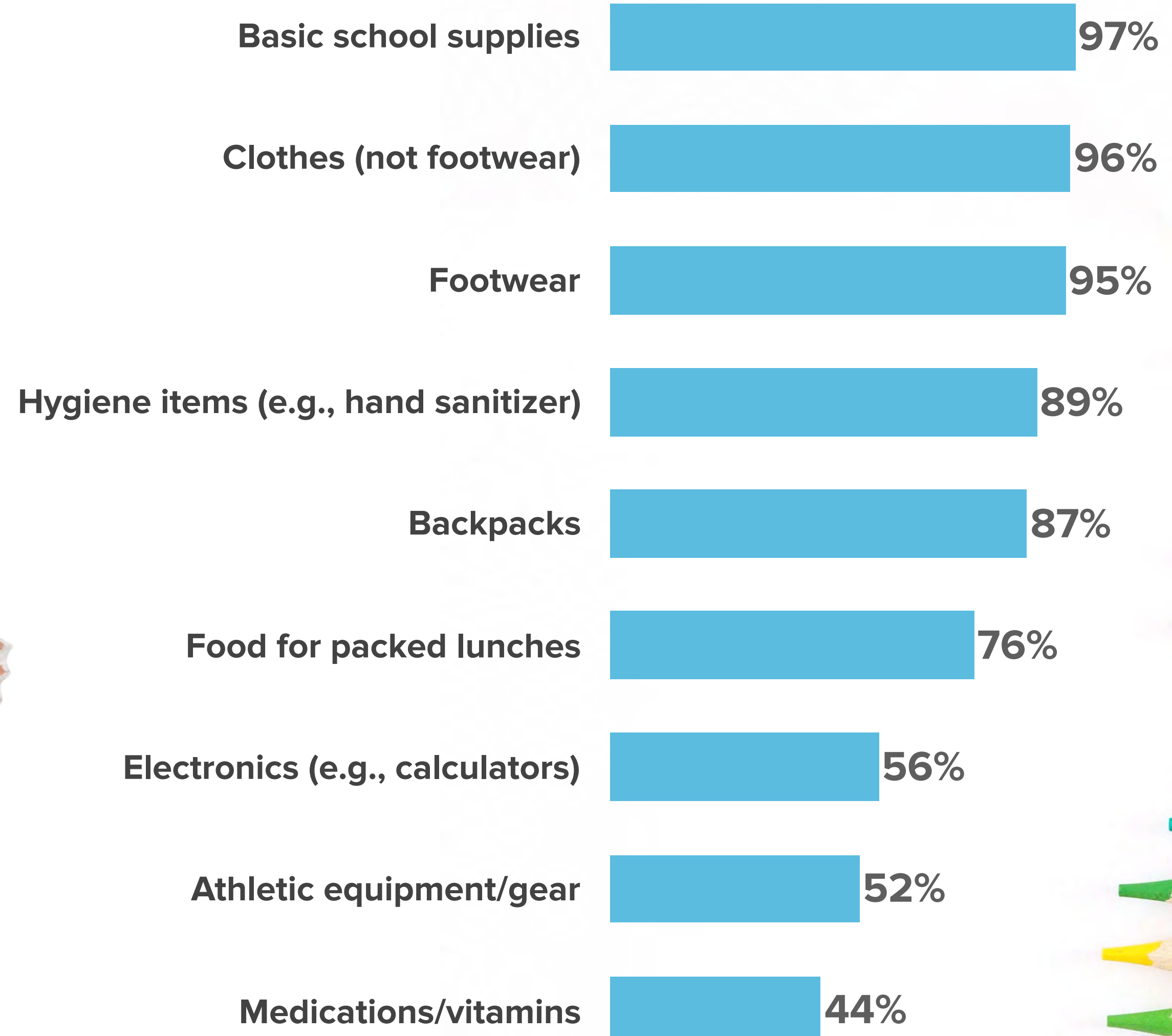
Among K-12 Moms who know they live in a state (or have access to a state) that offers tax-free BTS shopping one or more days (n = 901)



# Probable Purchases

Which of the following are you likely to purchase for the 2019-20 school year?

“I am a homeschooler, but we participate in a co-op and need supplies for home.” - Mom Quote



N = 1,349 K-12 Moms, selecting all options that apply to at least one of their children





# What's In-Store this BTS Season?

Mobile Audits can show you

[Learn More](#)



# Back-to-School Shopping Frustrations

Here are the top responses among 1,349 moms to the question, "What is the most frustrating part of BTS shopping?"

## Out of Stocks

"[Promoted deals] are often out-of-stock making it very frustrating and a waste of my time."

## Multiple store trips

"Finding everything each of my children needs without making 20 trips to stores."

## Crowds/lines

"The large crowds and long lines really kill my mood."

## Disorganization in stores

"The supplies end up unorganized and messy."

## Unnecessary purchases

"I find it frustrating that there are often a few items that I buy from the school-supplied list that aren't used."



## **Time-consuming**

“I don’t mind back to school shopping but sometimes finding the time to do it is challenging.”

## **Kids’ indecisiveness/ attitudes**

“Having to make the kids happy while adhering to school guidelines.”

## **Not finding items**

“Getting everything on the school supply list...because some of the things are tricky.”

## **The expense**

“Having to come up with money to buy three kids’ supplies all at the same time.”

## **Shopping for clothes**

“Finding the right sizes in the right styles.”

## **Insufficient notice from schools/teachers**

“Not knowing what items are needed far enough in advance.”





## 2019 Back-to-School Success Checklist ✓

### 1. Pricing

- Products are accurately priced
- Competitively priced
- Prices appeal to shoppers

### 2. On-Shelf Availability

- Products are carried by retail partners
- Sufficiently stocked on shelves

### 3. Shelf-Positioning/Planograms

- Products are accurately positioned on store shelves
- Competitively positioned on shelves
- Products are found by shoppers

### 5. Signage/Pop Materials

- Signage/POP materials arrived in-store
- Accurately positioned in stores
- Properly assembled in stores
- Visible to shoppers
- Appealing to shoppers
- Excels competitors' POP

### 6. Product Demos

- Product demos are in-store and properly executed
- Appealing to shoppers

### 7. Retail Intel

- Knowledgeable of competitors' retail strategies
- Aware of target customer's shopping attitudes and behaviors

### General

I would like to audit my brand's BTS

I would like to audit my brand's inventory

# Is Your *Brand* Ready to Go Back-to-School?

How will your brand perform with BTS shoppers in 2019? Download Field Agent's "***BTS Success Checklist***" to get a quick gauge.

[Download Free Checklist](#)



# Supplying BTS







Virtually all moms expect to visit stores for BTS supplies this year, yet about **three-quarters** think they'll also **purchase at least some supplies online.**

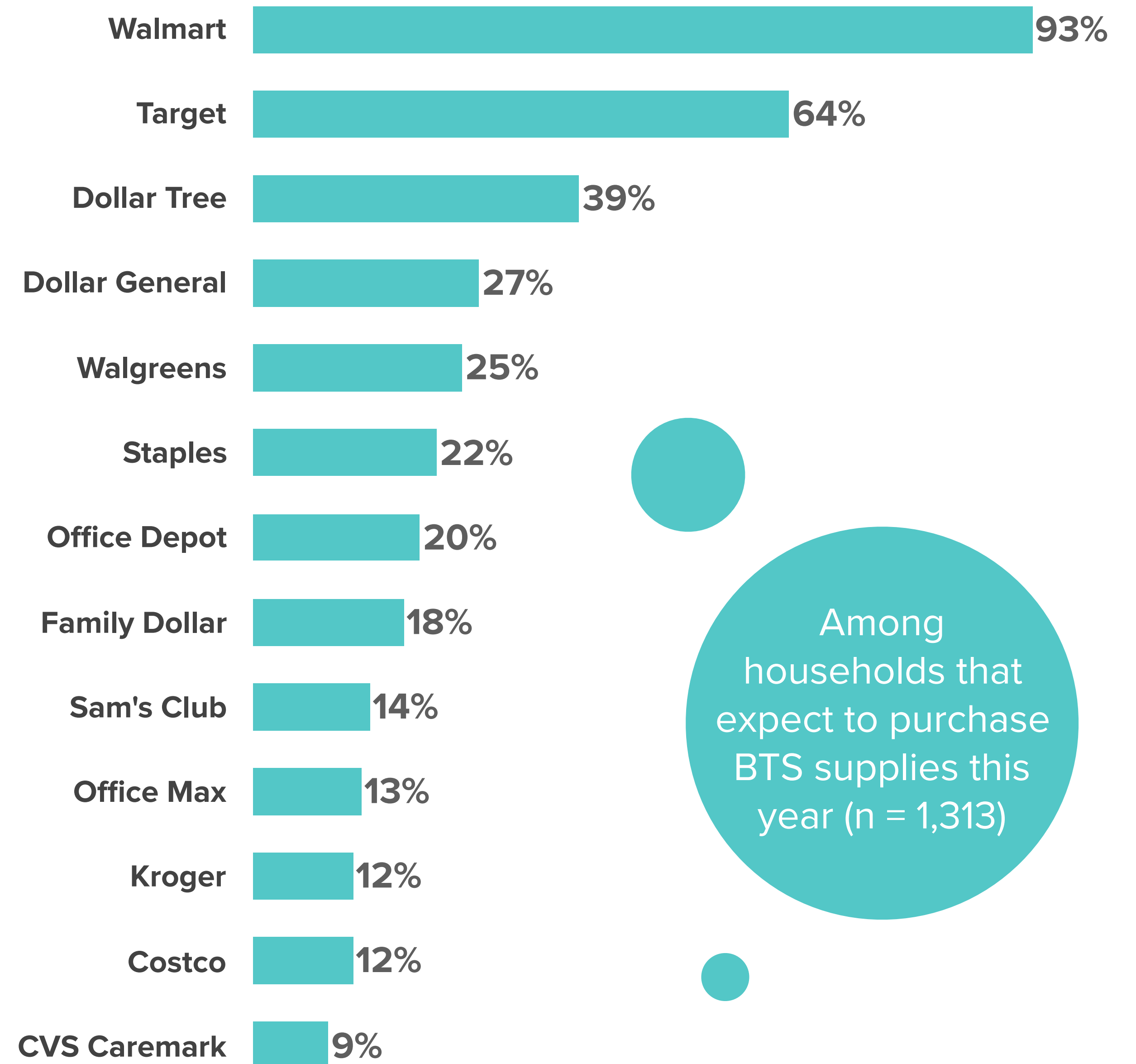


# Top Stores

Identify all the brick-and-mortar stores from which you'll likely purchase school supplies for Back-to-School 2019-20.

“Luckily Walmart makes [BTS shopping] easier on parents by knowing what the lists are for nearby schools.”

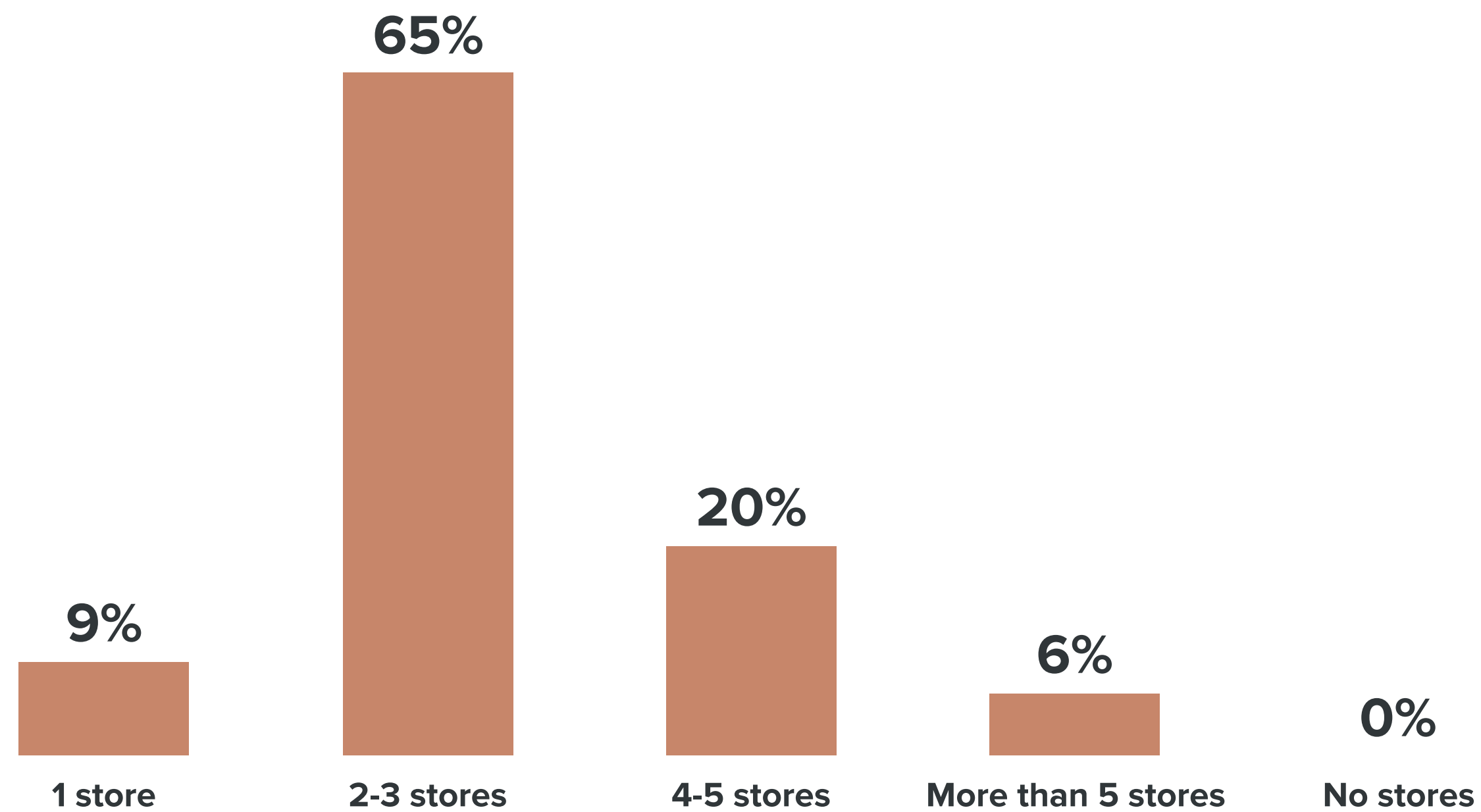
- Mom Quote





# Store Trips

How many brick-and-mortar stores will your household probably visit to purchase school supplies for Back-to-School 2019-20?



Among households that expect to purchase BTS supplies this year (n = 1,313)

*“[It’s frustrating] finding everything each of my children needs without making 20 trips to stores.”*

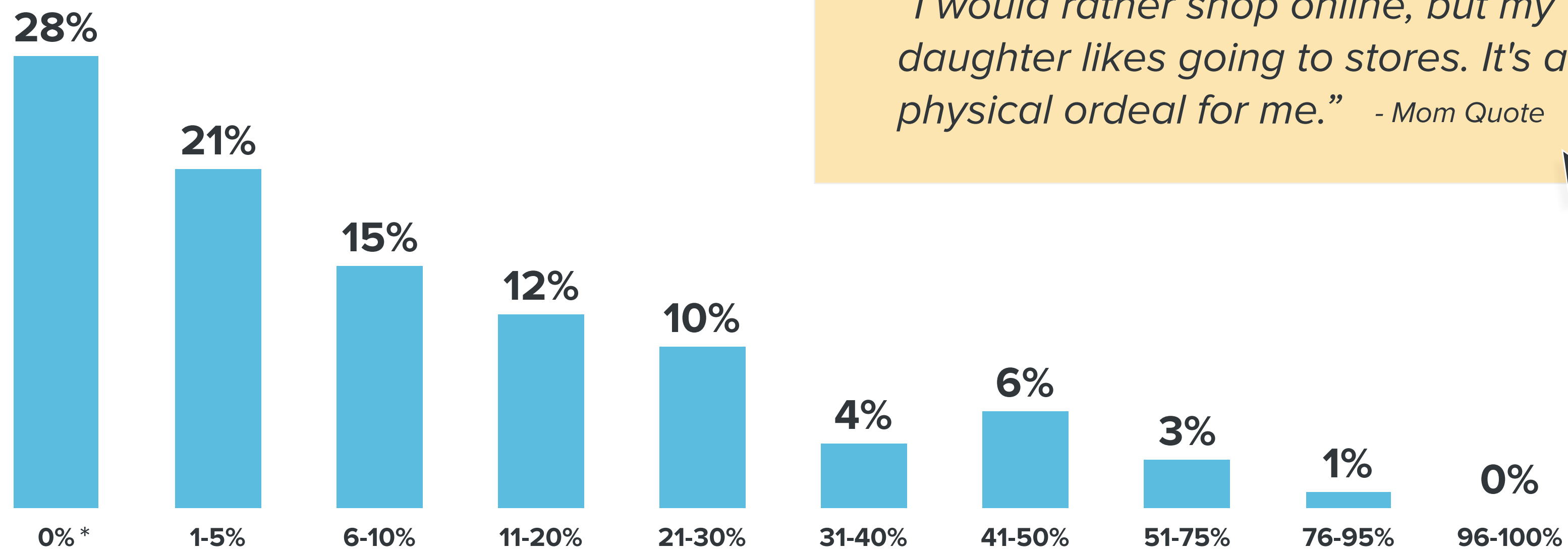
- Mom Quote



# Online Shopping

Approximately what % of school supplies do you estimate your household will purchase online for Back-to-School 2019-20?

Among households that expect to purchase BTS supplies this year (n = 1,313)



*"I would rather shop online, but my daughter likes going to stores. It's a physical ordeal for me." - Mom Quote*

\*Will purchase school supplies but not online

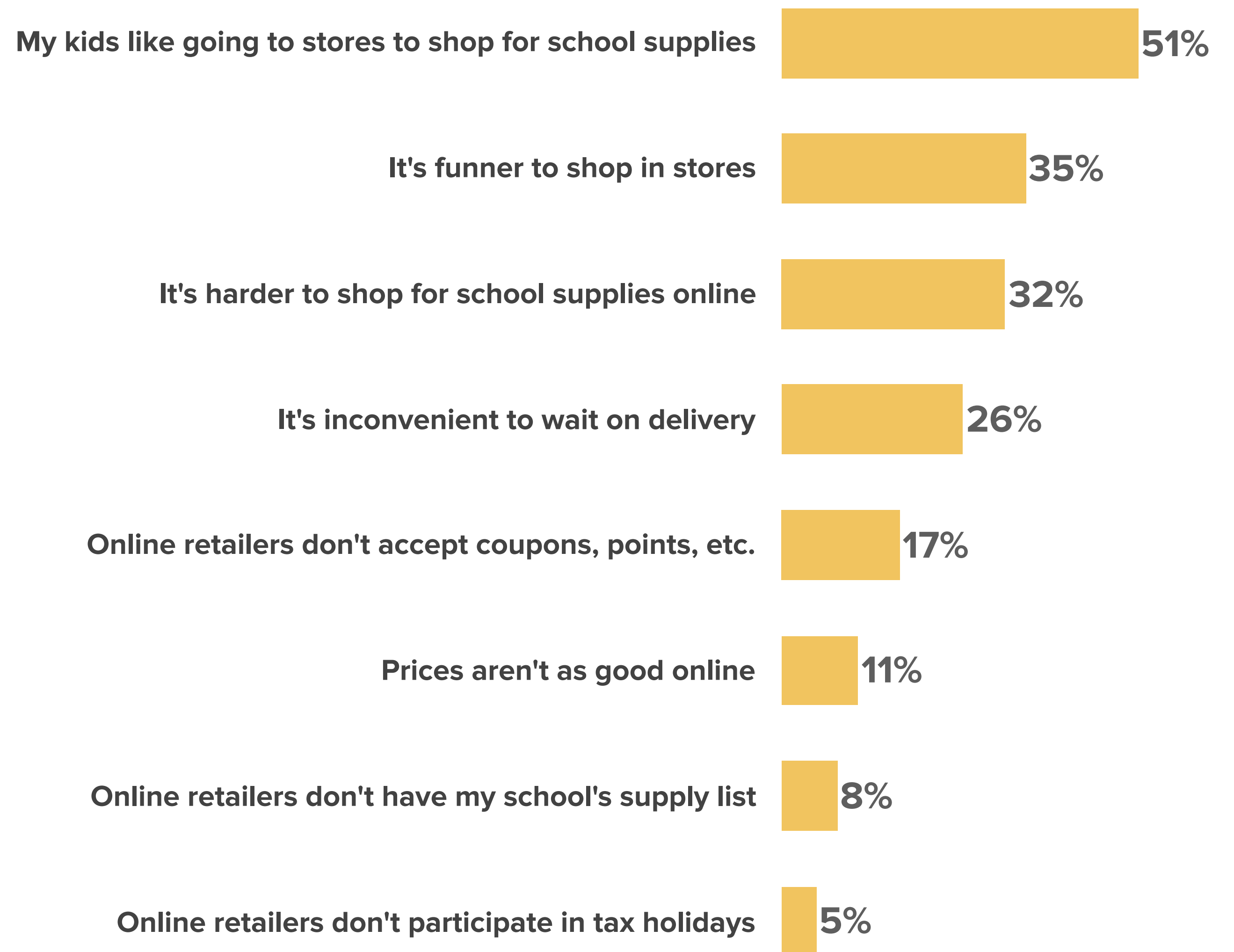


# In-Store Only

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

Among respondents who do not shop online for school supplies (n = 351)

“I enjoy school shopping for my kids because it gets them excited about school!”  
- Mom Quote





# Online Retailers



From which online retailers do you expect to purchase school supplies for the 2019-20 BTS season?

Only among respondents who plan to shop online for school supplies (n = 947)



## The Digital Shopper

Insights into Today's Most 'Connected' Shoppers

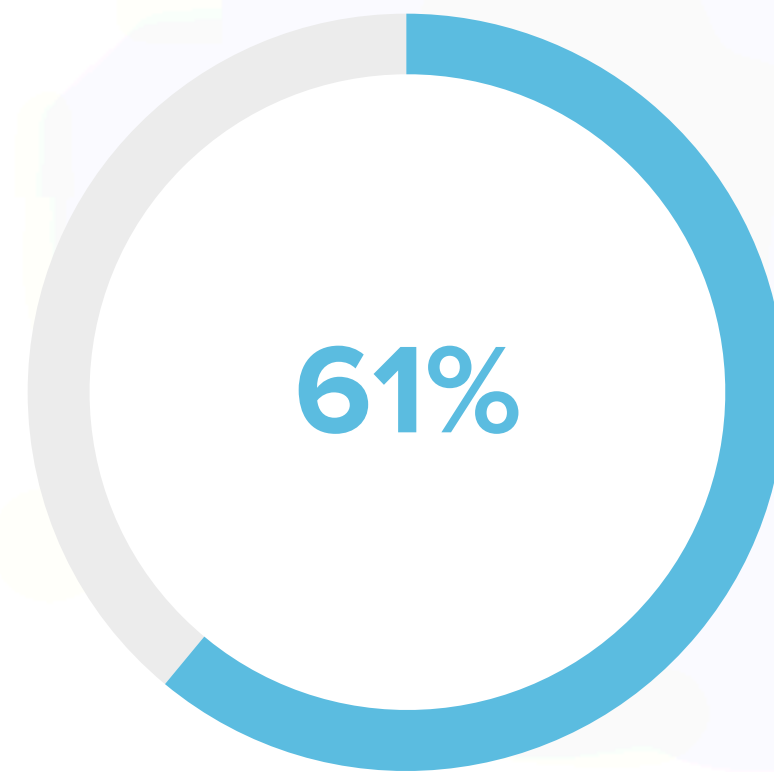
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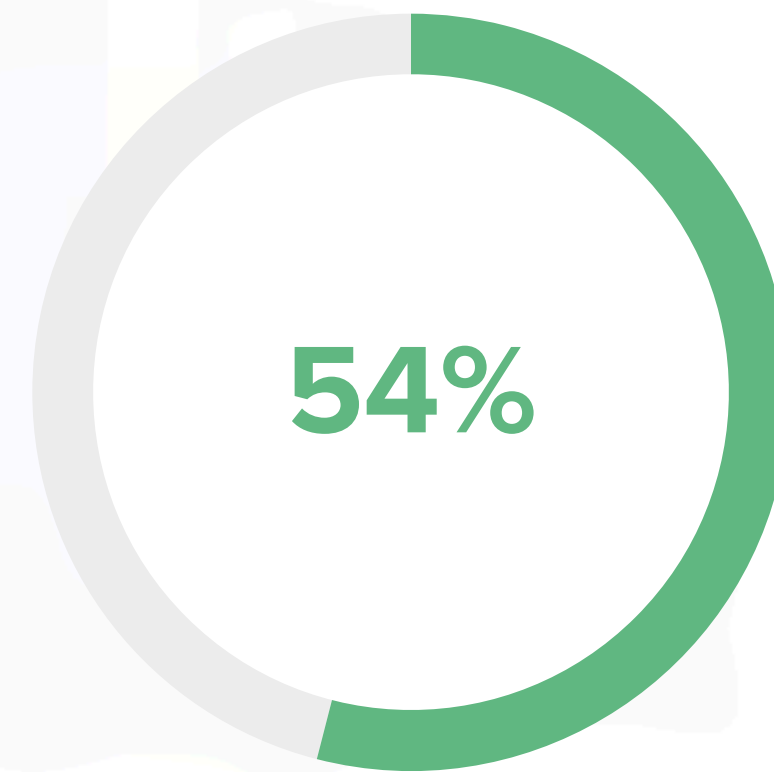
# Delivery or Pickup?

Which methods are you moderately likely to use for buying school supplies?

Only among respondents who plan to shop online for school supplies (n = 947)



Online ordering for package delivery to your home



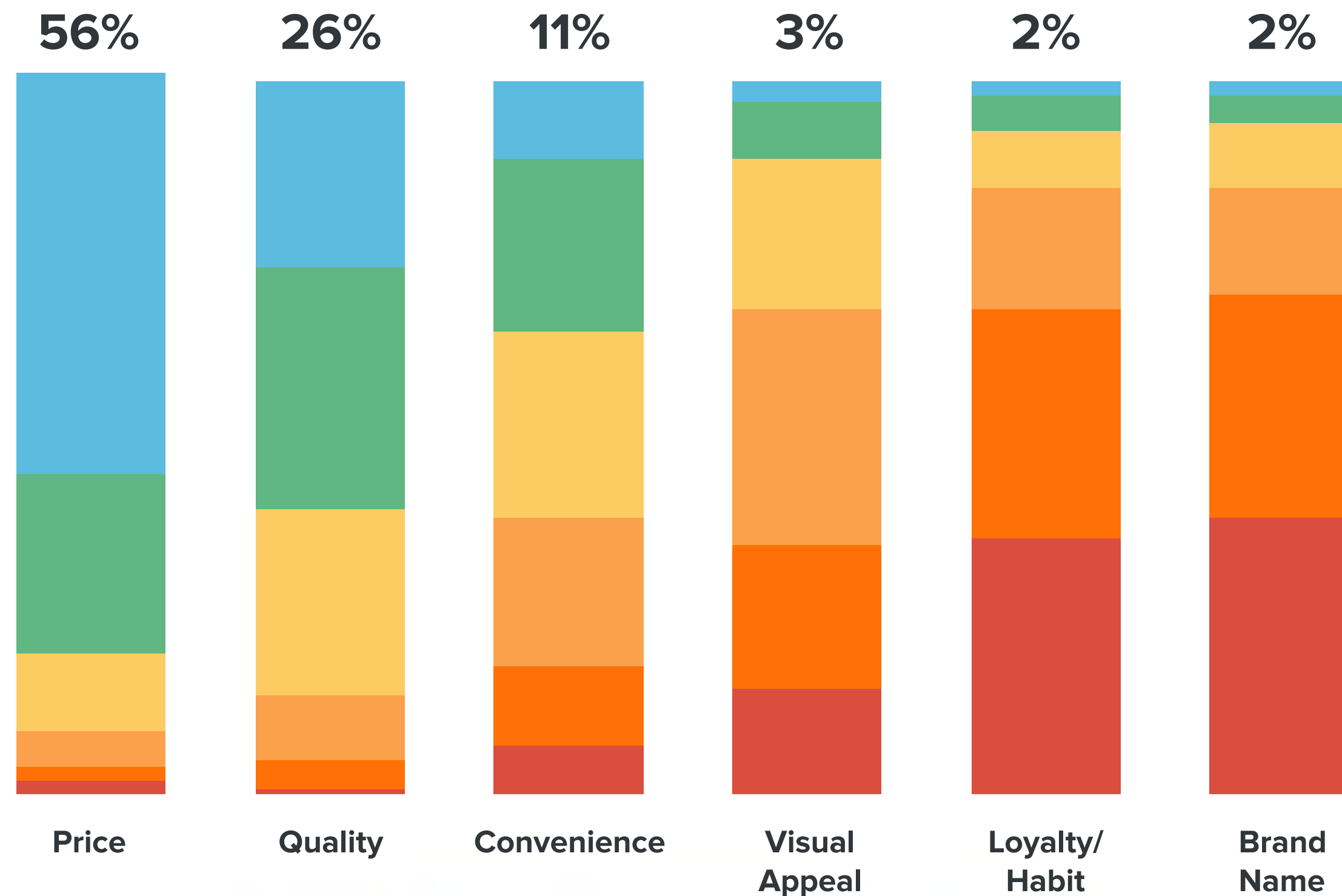
Online ordering for pickup at a store

“With online ordering and store pickup becoming a trend, it’s easier to shop [for BTS].” - Mom Quote



# What Really Matters

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



- #1
- #2
- #3
- #4
- #5
- #6



N = 1,349 K-12 Moms





# Feeding BTS





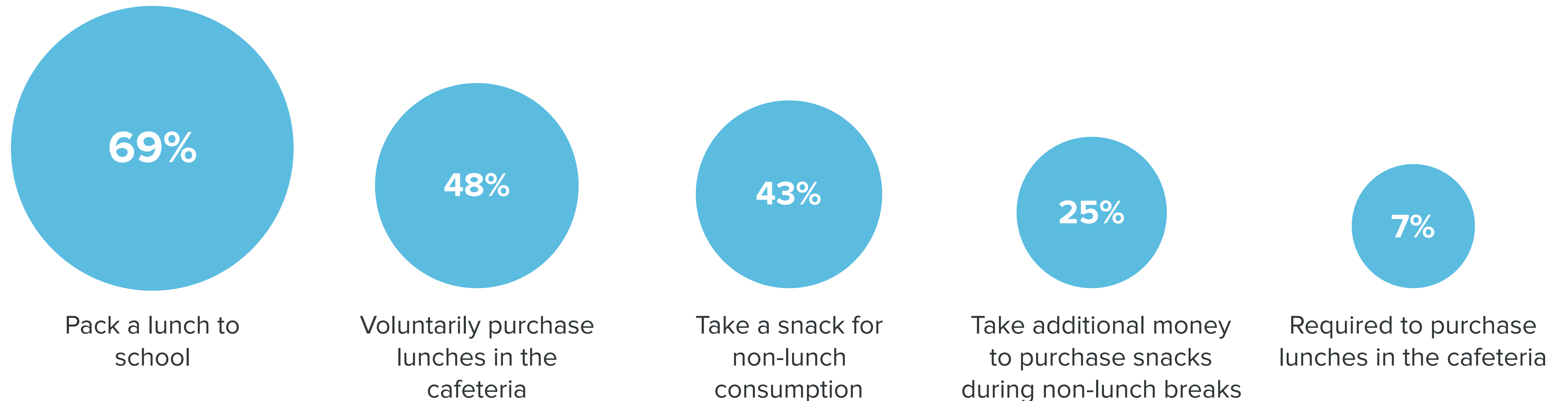
School-day lunches, snacks, and breakfasts are big business. And sellers of **salty snacks, lunch meat, and breakfast cereal** should come out the real winners.



# Meal/Snack Plans

Which statements describe your children's meal/snack plans for the upcoming school year?

“My homeschooled children attend a one-day per week co-op where a sack lunch is needed.” - Mom Quote

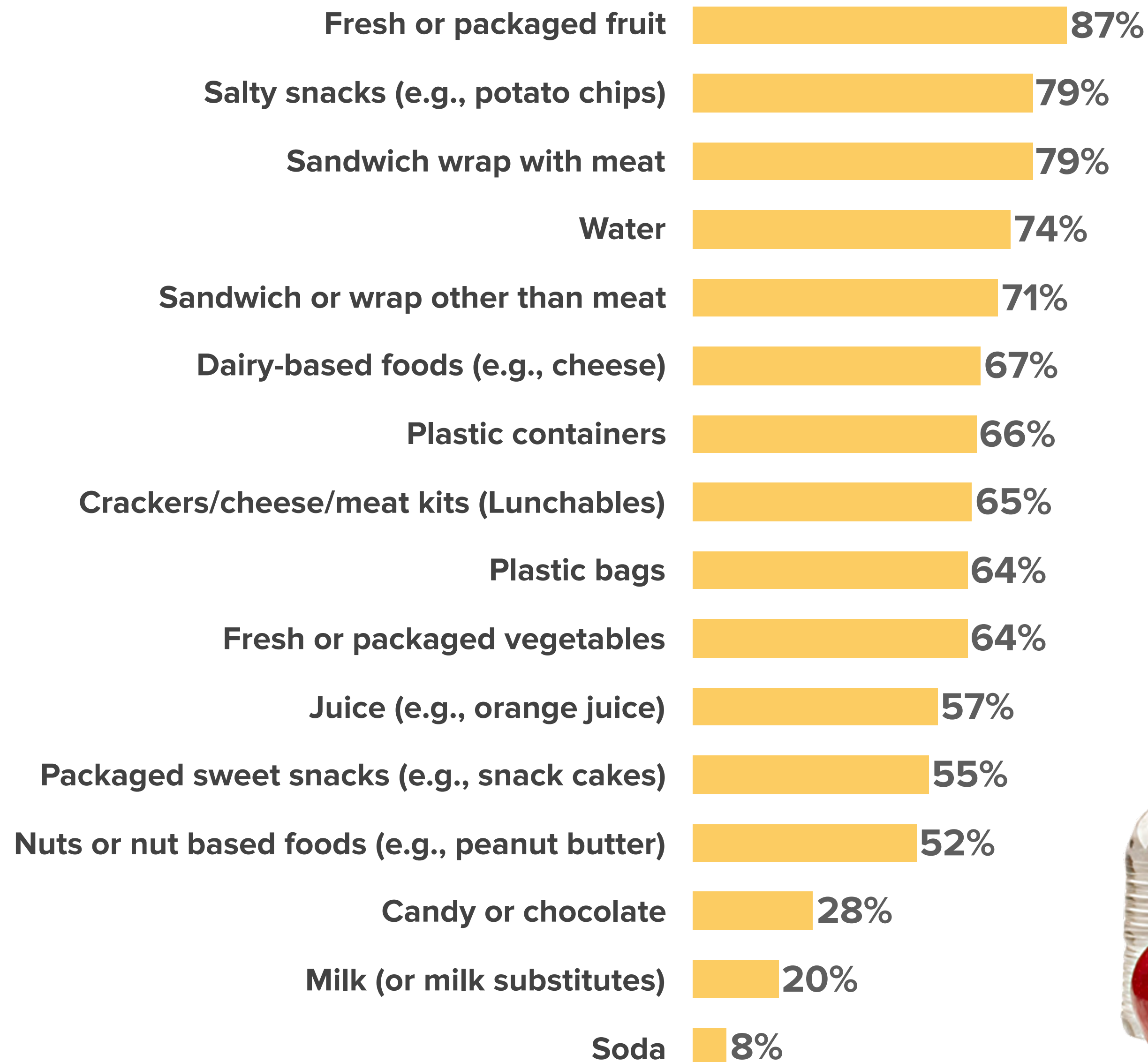




# Packed Lunches

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

Among households who pack lunches for school (n = 961).  
Moms selected all options that apply to at least one of their children



“My child is unable to warm any food up, so I have to be creative with cold meals. We do not eat processed food, except for sandwich meat.”

- Mom Quote



FIELD AGENT<sup>®</sup> PRESENTS

GROCERY SHOPPING WITH GEN



INSIGHTS ON THE  
NEXT GENERATION

March 2019

# Speaking of Young'uns

Download Field Agent's Special Report:

***GROCERY SHOPPING WITH GEN Z***

Field Agent surveyed 775 18-22 year olds to understand how the next generation of shoppers could impact grocery-retail.

[Download Free Report](#)



# Lunch Retailers

From which retailers will you likely purchase groceries for your kids' packed lunches?

Among households who pack lunches for school (n = 961)

#1



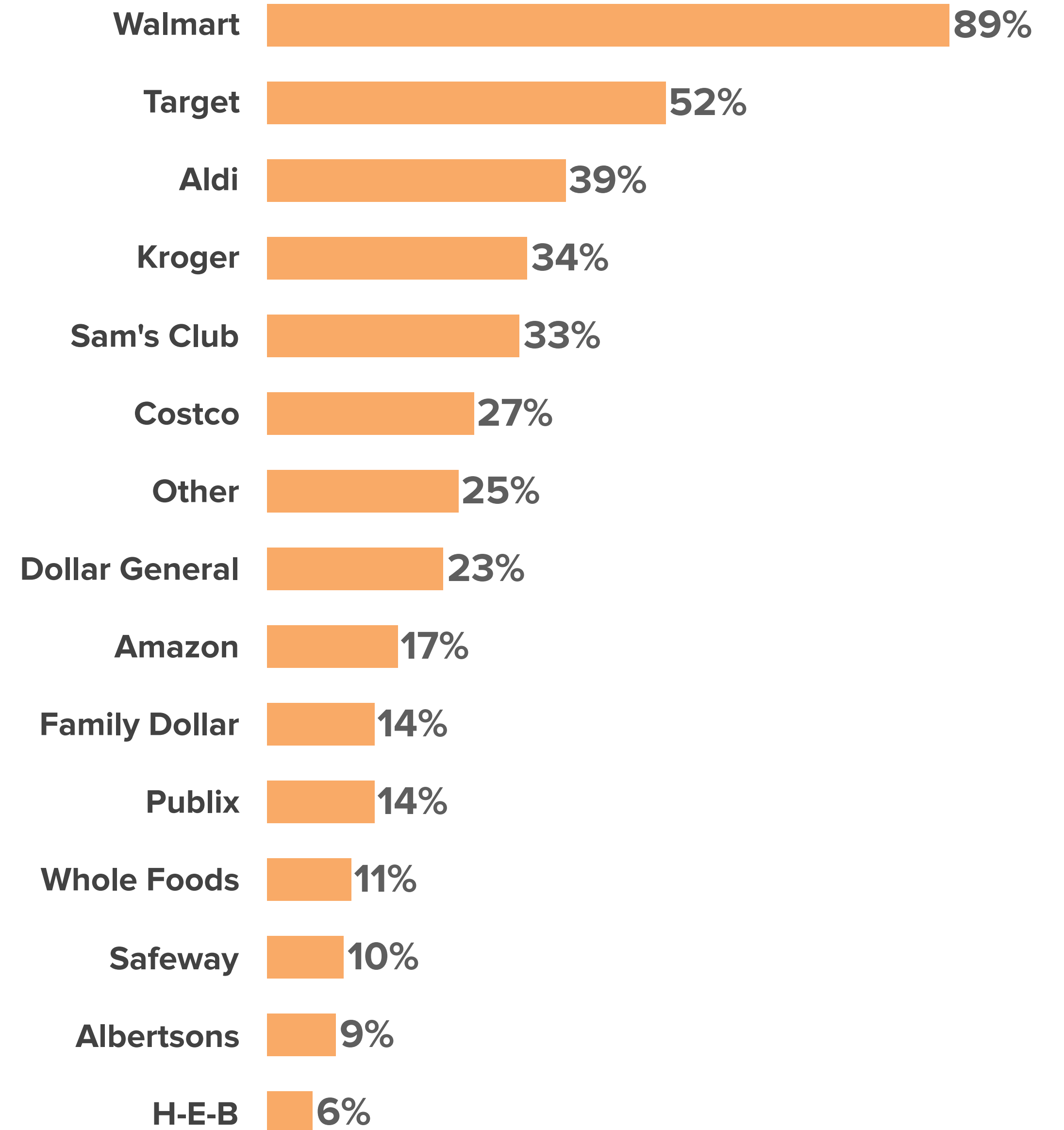
#2



#3



#4

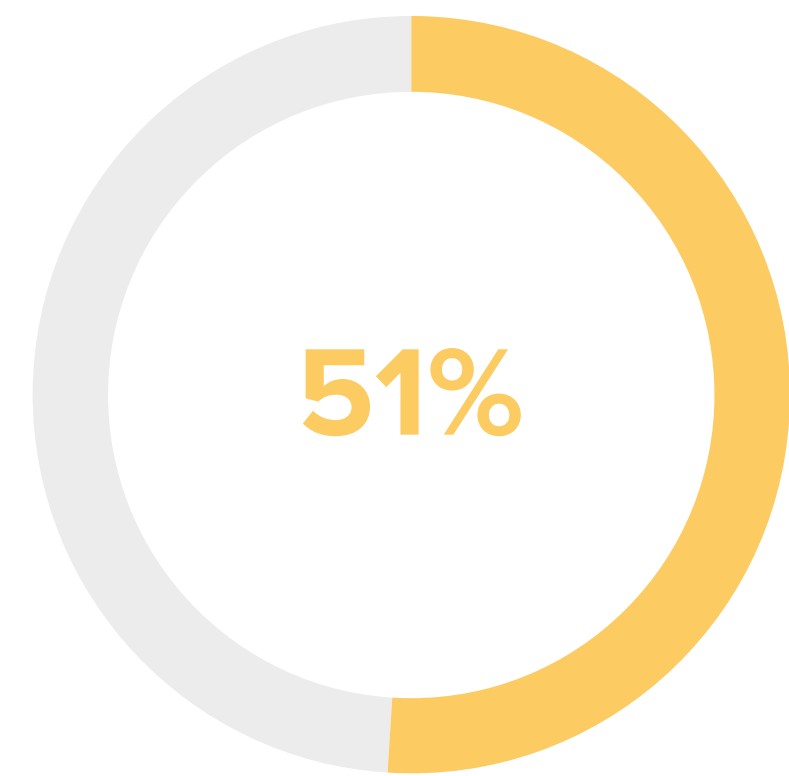




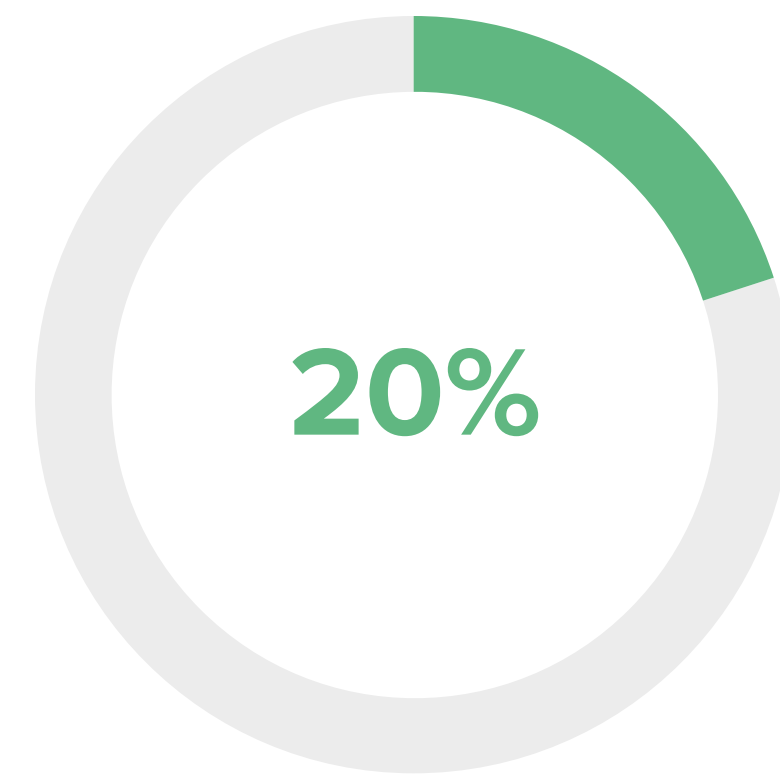
# Omnichannel Methods

Which methods are you at least moderately likely to use to obtain foods/beverages/supplies for your kids' packed lunches?

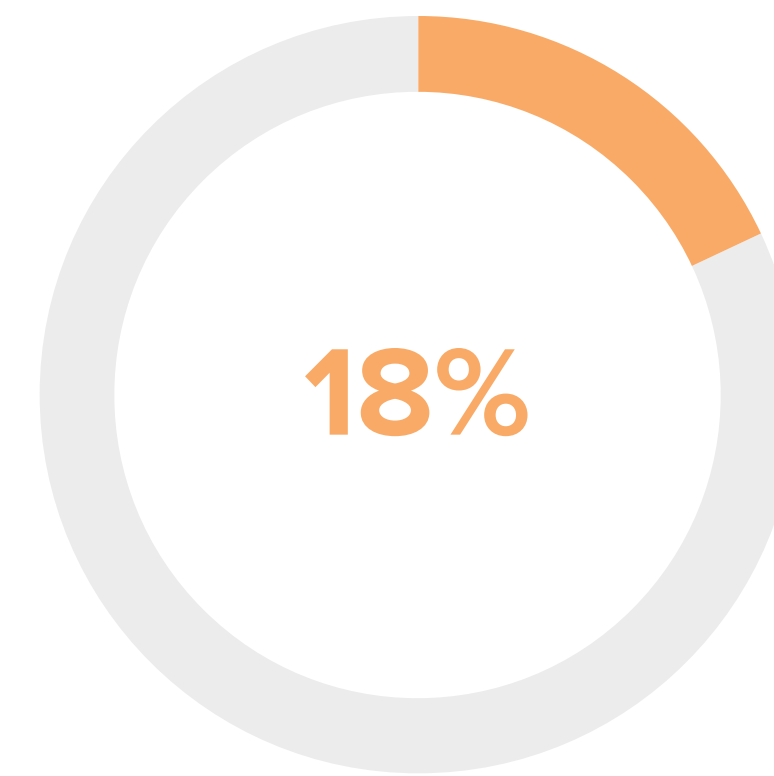
Among households who pack lunches for school (n = 961)



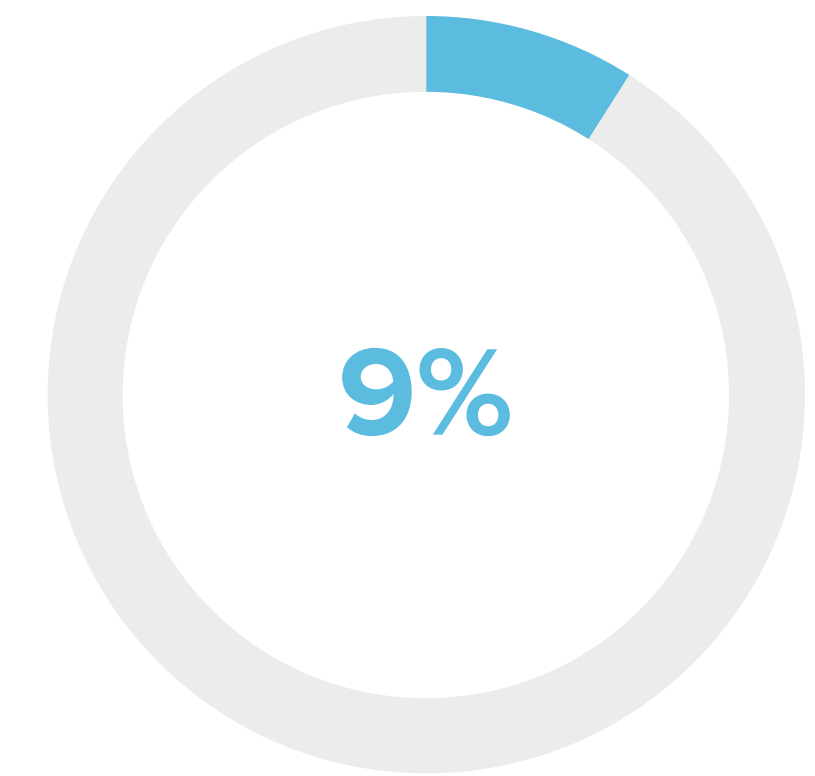
Online ordering for pickup at the store



Online ordering for package delivery to your home



Online ordering for local, 'fresh' grocery delivery to your home (e.g., Instacart)



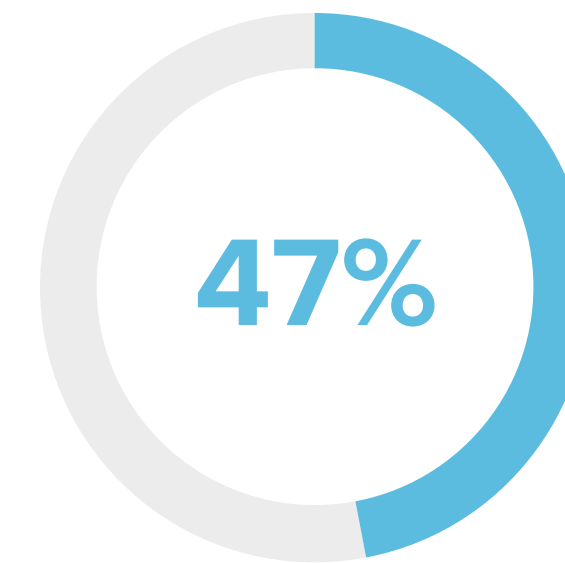
Voice ordering through a 'smart speaker' (e.g., Amazon Echo/Google Home)



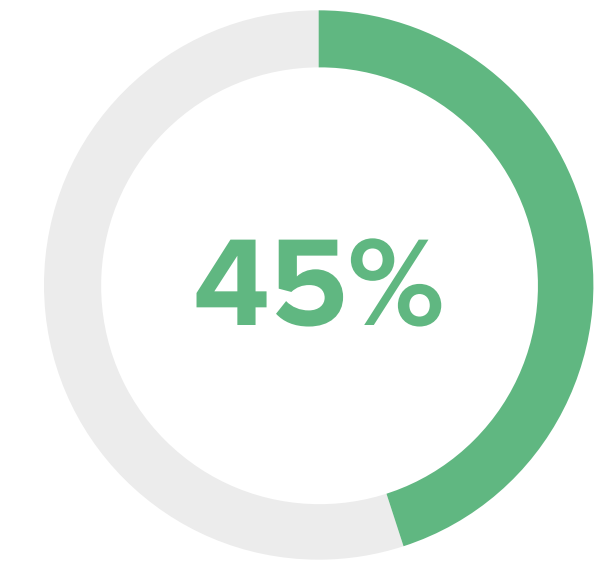
# Breakfast Routines

How will your children mostly eat breakfast prior to attending classes in 2019-20?

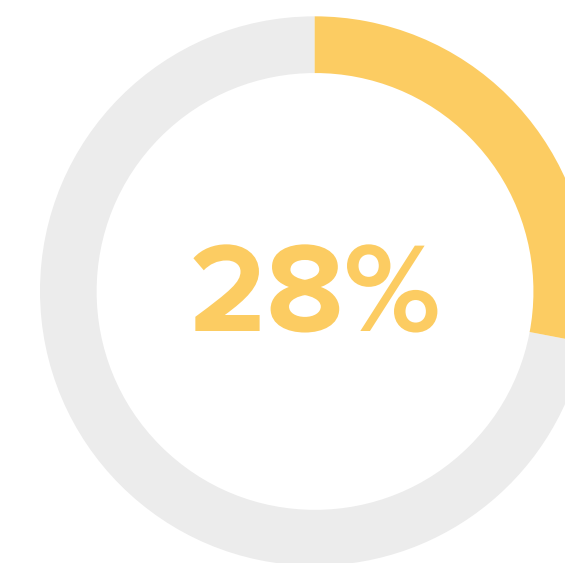
N = 1,349 K-12 Moms, selecting all options that apply to at least one of their children



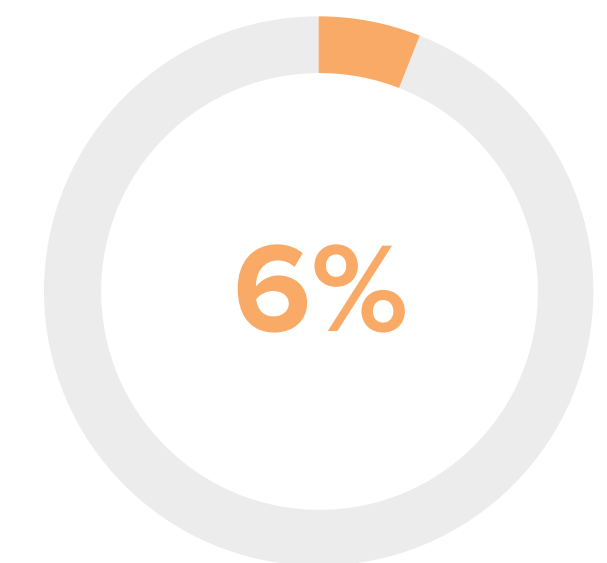
Will mostly eat freshly-prepared breakfast at home before attending school (e.g., eggs, bacon)



Will mostly eat packaged breakfast items before attending school (e.g., cereal, protein bars)



Will mostly eat breakfast prepared by the school (e.g., served in the school cafeteria)



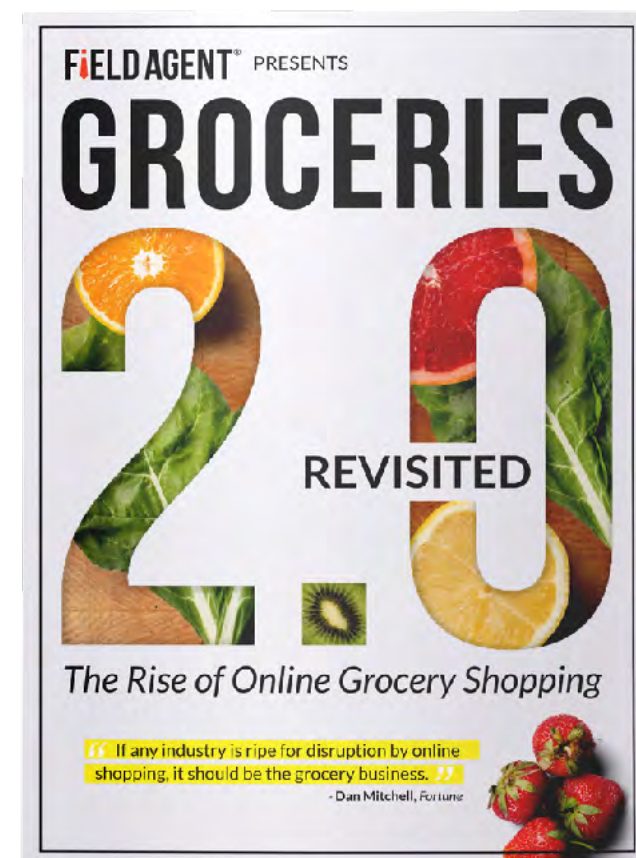
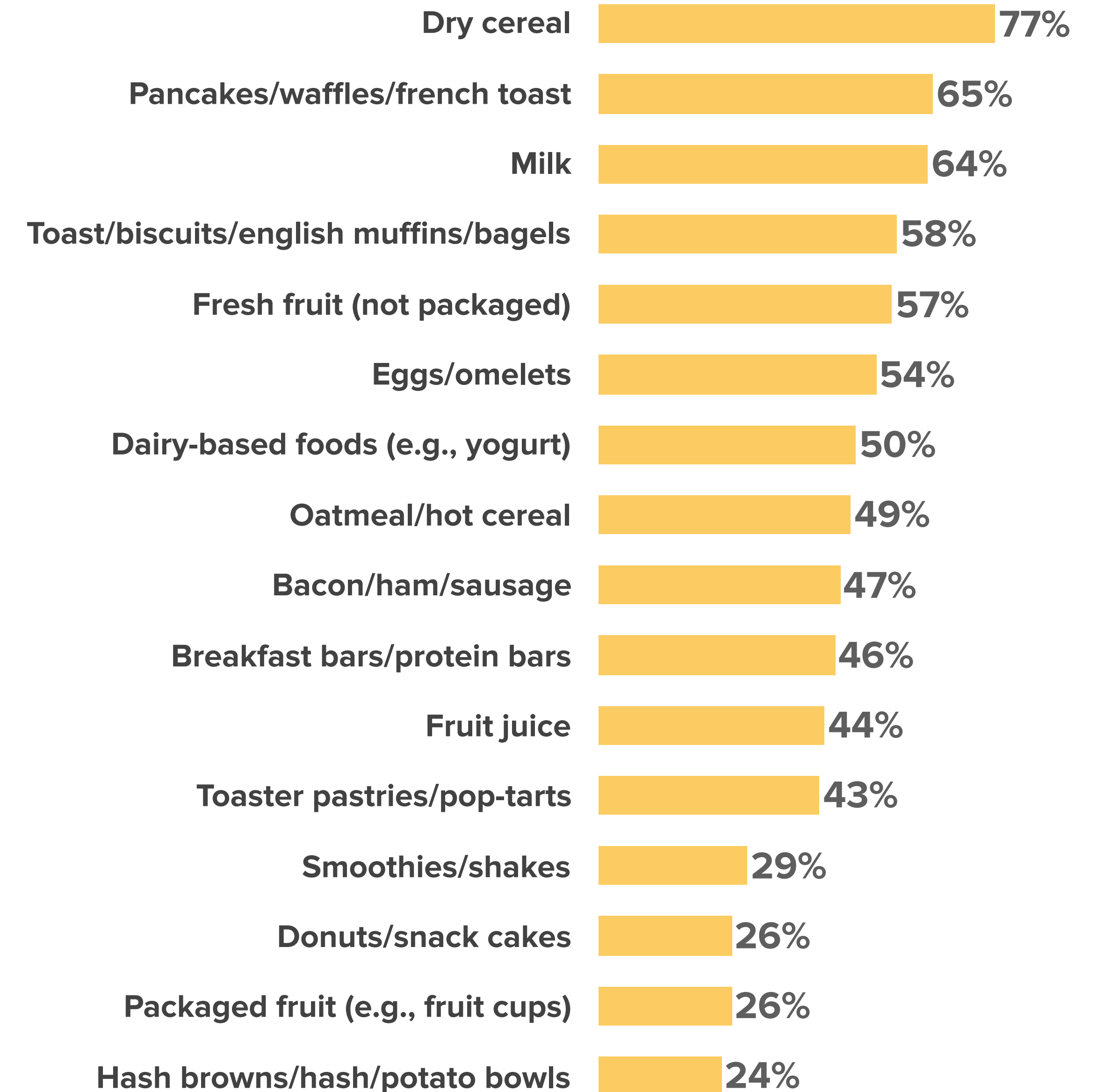
Mostly will not eat breakfast before attending school



# Breakfast Foods

What will your kids most likely eat/drink for breakfast before attending school during the 2019-20 school year?

Among households that will serve breakfast at home prior to school (n = 1,047)



## Groceries 2.0

The Rise of Online Grocery Shopping

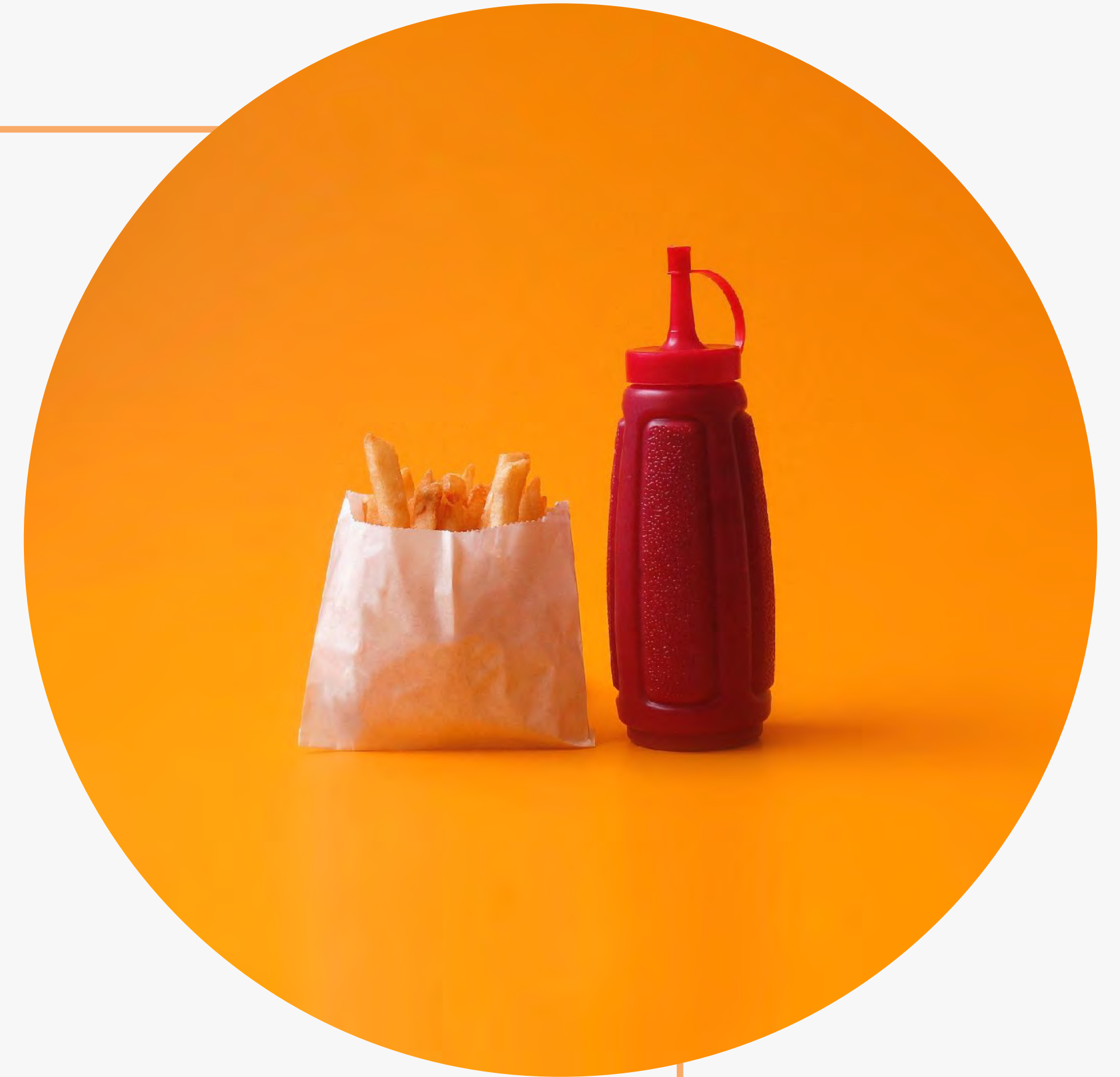
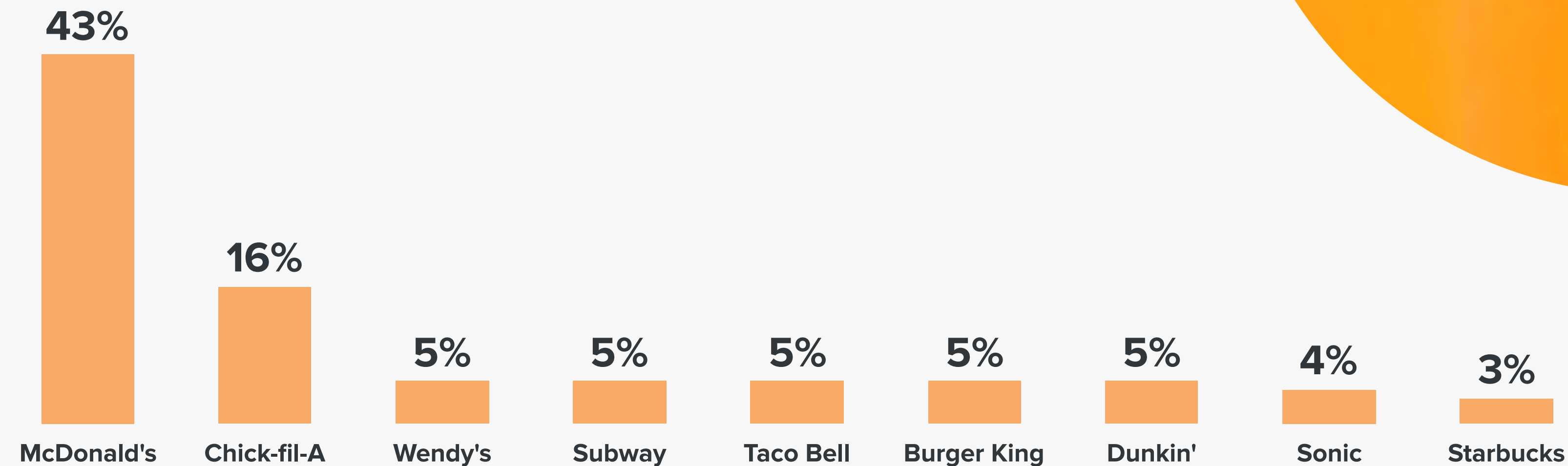
[Get the Report](#)



# Fast Foods

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 households who feel the question applies (n = 1,218)

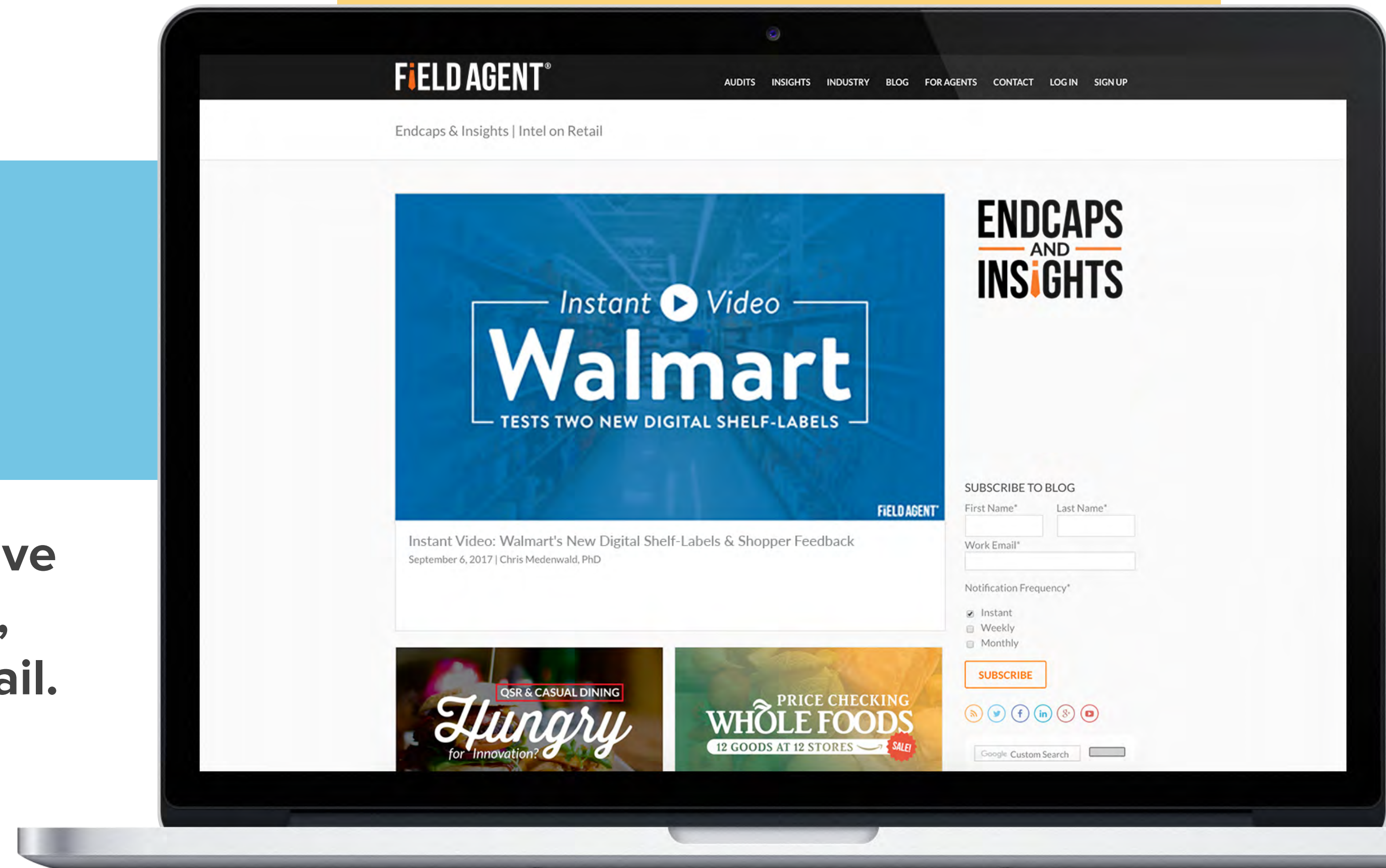




# Want More Insight into Today's Shoppers?

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# Clothing BTS







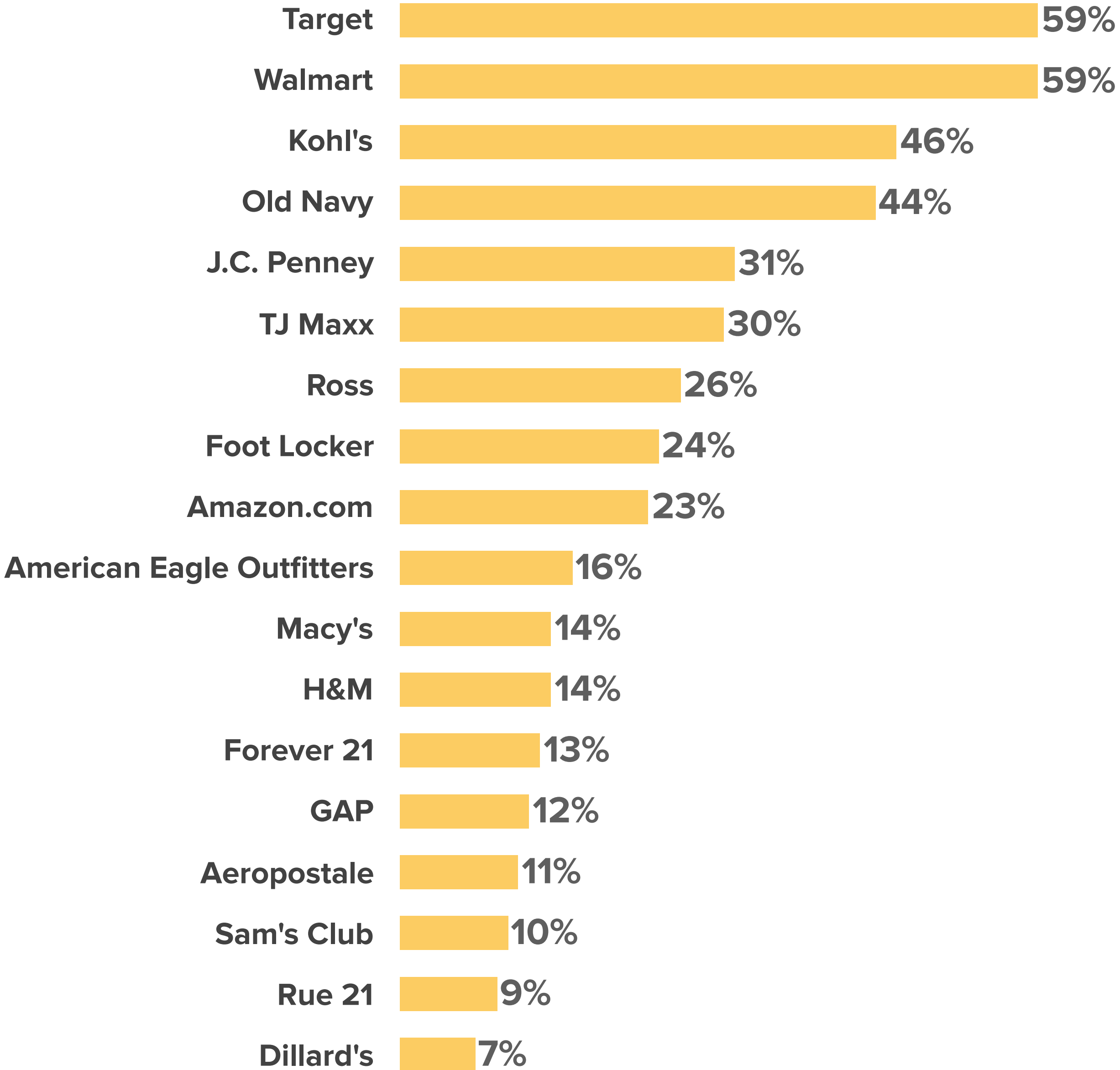
**Walmart** and **Target** are not only popular for school-supply purchases, but they're also popular for BTS clothing and footwear.



# Attire Retailers

From which retailers (brick-and-mortar and/or online) will you likely purchase attire and/or footwear for Back-to-School 2019-20?

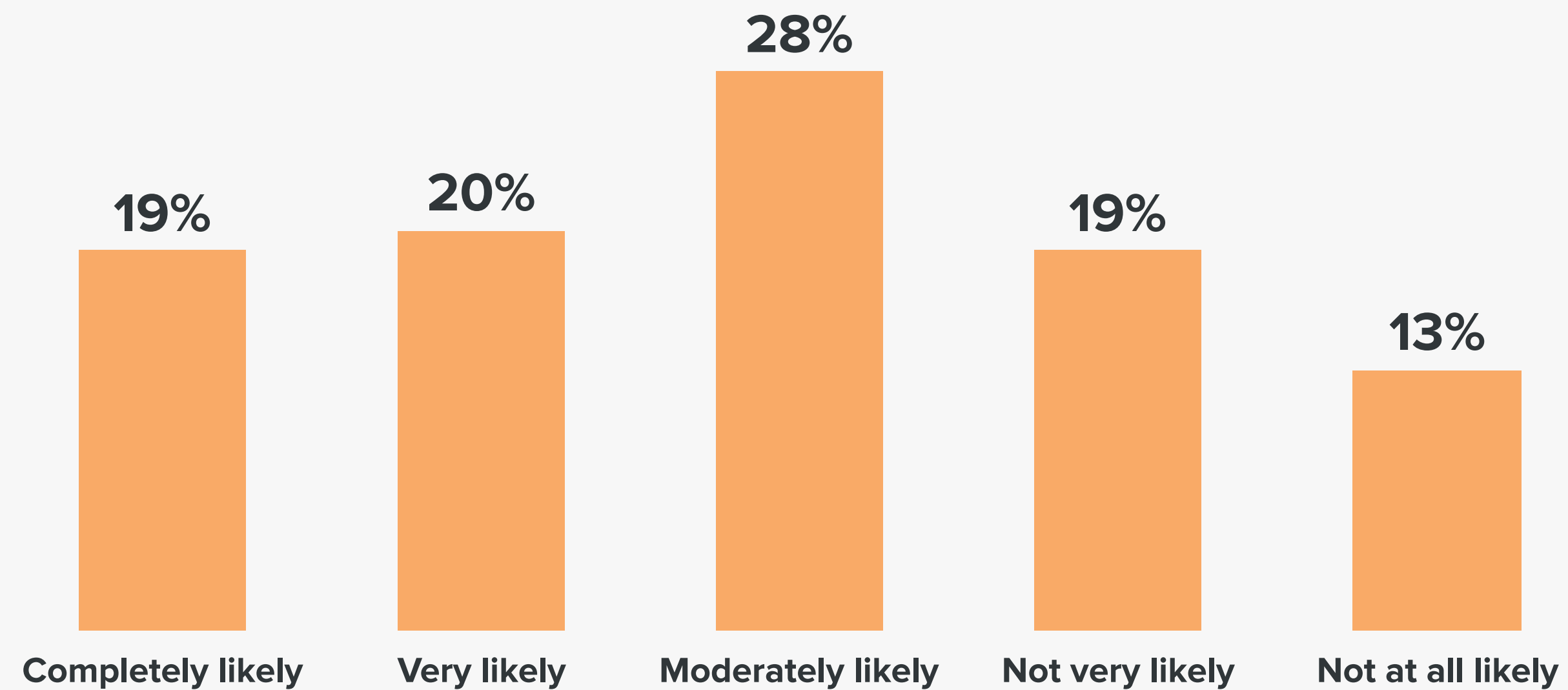
Among households that expect to purchase clothes and/or footwear for the coming school year (n = 1,319)





# Online Clothing

What is the likelihood you will purchase clothing/ footwear online for Back-to-School 2019-20?



*“My son wears a youth XXL and I can usually only order those online.”*



Among households that expect to purchase clothes and/or footwear for the coming school year (n = 1,319)



# Demos & Details

## Respondent ethnicity:\*

Caucasian or White	<b>63%</b>
Latino or Hispanic	<b>17%</b>
African American or Black	<b>14%</b>
Other	<b>6%</b>

## Respondent age:

18-34	<b>26%</b>
35-44	<b>53%</b>
45+	<b>22%</b>

## Household income:

Under \$35K	<b>22%</b>
\$35-49K	<b>19%</b>
\$50-99K	<b>40%</b>
\$100K+	<b>19%</b>

## Respondents identified the age/gender of all K-12 children in their household, as follows:

Boy(s) entering Kindergarten-2nd grade	<b>23%</b>
Boy(s) entering 3rd grade-5th grade	<b>20%</b>
Boy(s) entering 6th grade-8th grade	<b>22%</b>
Boy(s) entering 9th grade-12th grade	<b>24%</b>
Girl(s) entering Kindergarten-2nd grade	<b>20%</b>
Girl(s) entering 3rd grade-5th grade	<b>19%</b>
Girl(s) entering 6th grade-8th grade	<b>18%</b>
Girl(s) entering 9th grade-12th grade	<b>23%</b>

92% of respondents reported that at least one of their children will attend school outside the home for the 2019-20 school year. The remaining respondents will homeschool all their children in 2019-20.

\*Data were weighted to reflect the ethnic distribution of the general U.S. population. No other demographic categories were weighted.



# Make the Grade with BTS Shoppers

Field Agent serves companies with an assortment of fast, affordable services...so you can make the grade with BTS shoppers this year

- ✓ Retail-Auditing
- ✓ Market Research
- ✓ Mystery Shopping
- ✓ Influencer-Marketing

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