

FIELD AGENT

# Back to School 2020

Coronavirus Insights

June 2020





# Back to School?

Normally, Back to School (BTS) is the second largest shopping season of the year. Normally, BTS is a red-letter event for retailers and brands selling school supplies, attire, and groceries. Normally, BTS is when families make a variety of purchases to send kids back to classrooms, playgrounds, gyms, and cafeterias. *Normally*. But 2020 is *not* normal.

As COVID-19 continues making the rounds, and communities, school districts, and families everywhere take precautions, much about the upcoming BTS shopping season is cloaked in uncertainty.

- Will families even *send* kids back to school this year?
- How will school districts alter programming?
- And what will be the impact of all this on BTS shopping?

One thing's for sure: BTS 2020-21 will be unprecedented, and it's simply not possible to answer questions like those above with complete certainty. *But*, we can get a pulse on BTS shoppers and their concerns, intentions, and suggestions as they look ahead to the coming BTS season.

Field Agent's 2020-21 BTS Report, based on surveys with 1,443 moms of K-12 students, offers a glimpse into the thoughts, needs, and expectations of this year's BTS shoppers—as *crazy* as the year is turning out to be. The pages to come entertain several questions that have appeared in our BTS report year after year, yet you'll also find some new questions intended to help retailers, brands, and other companies understand BTS shoppers in the brave new world of COVID-19.

We trust you'll find this report useful as you make ready for BTS shoppers this year. It'll be a year to remember. That's for sure.

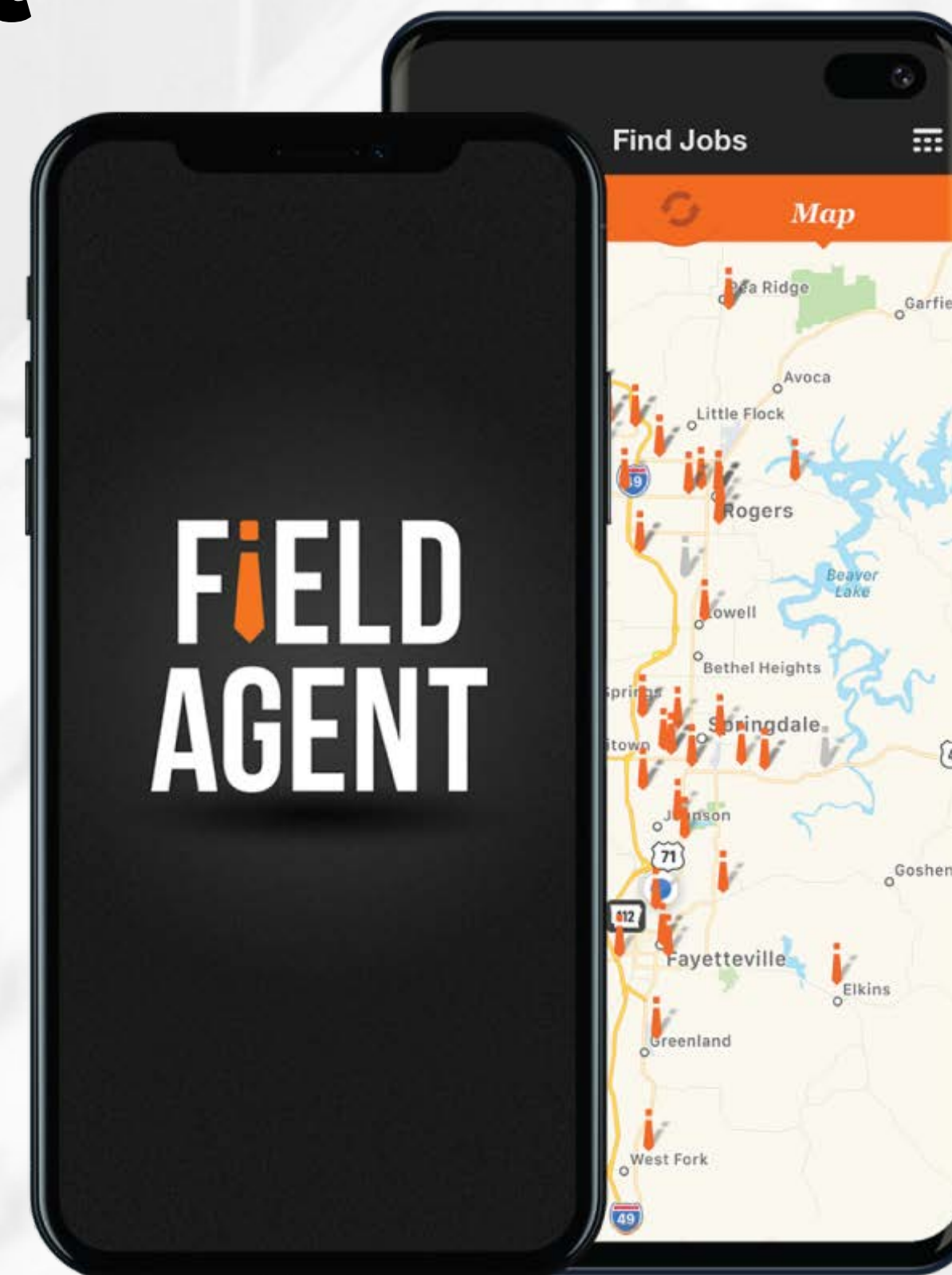




# About Field Agent

Field Agent is an on-demand platform that crowdsources the smartphones of over two million app-users across the United States and around the globe to furnish brands, retailers, and other businesses with fast, affordable retail audits, mystery shops, shopper insights, ratings and reviews, and digital product demos.

**We help companies win at retail,  
entirely on-demand.**



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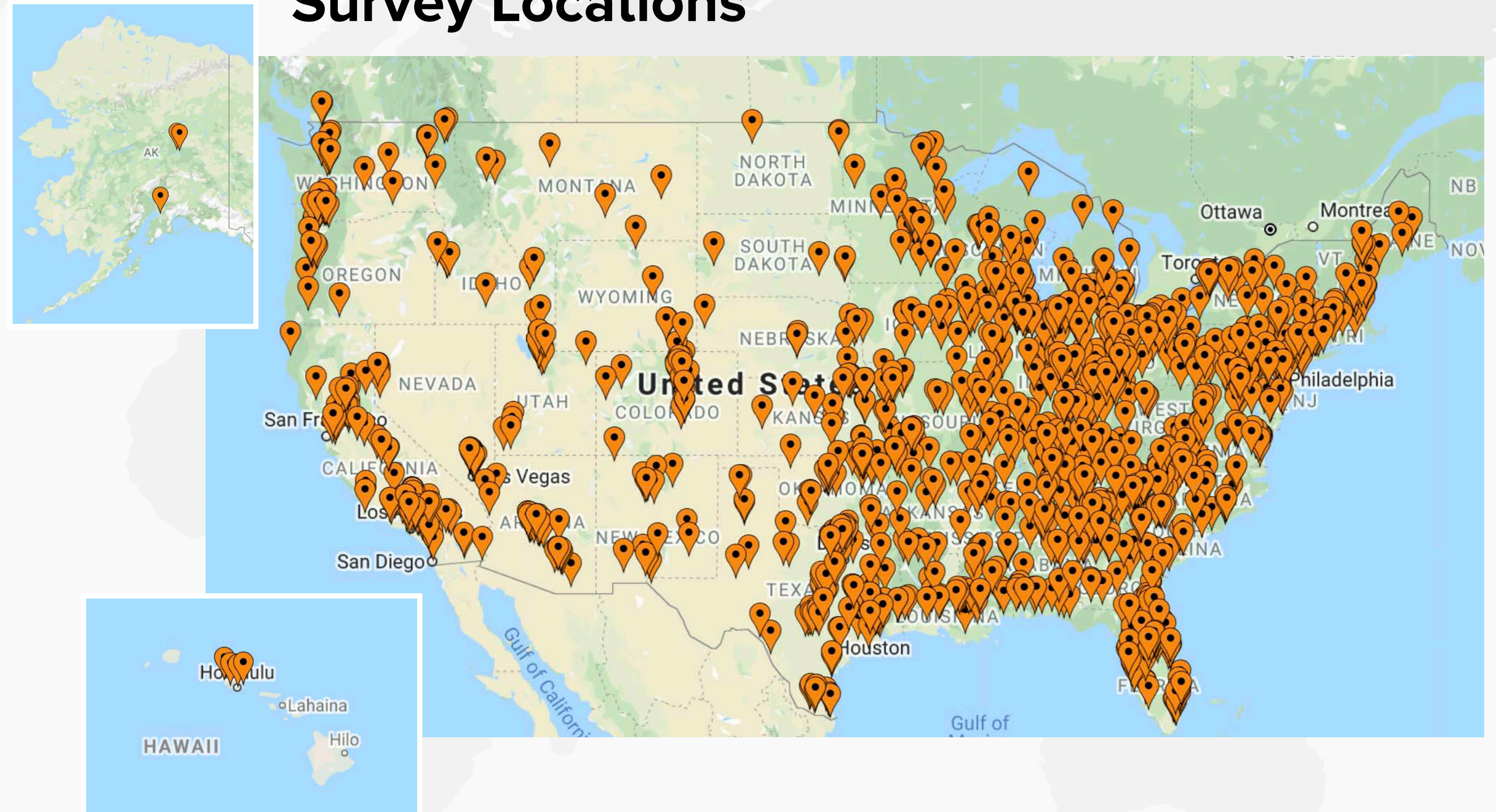


# What We Did

Field Agent surveyed 1,443 moms of children entering K-12 in the fall of 2020. All respondents were U.S. smartphone owners at least 18 years of age. The survey was completed entirely through the Field Agent mobile app, June 9, 2020.

See “**Demos & Details**”  
at the end of this report

## Survey Locations



**N = 1,443 K-12 Moms**





Agent Photos



## Back to School Displays

During the 2019 BTS season, Field Agent dispatched agents to 200 stores across 50 different retail chains to capture photos of remarkable BTS-themed product displays. Enjoy this look back at some of the A+ displays from last year's BTS season.

[See Full BTS Display Gallery](#)





Agent Photos





### COVID-19 Insight:

87% of moms surveyed about their 2020 BTS shopping said they felt completely or very confident in the answers they provided, even in this environment of comparatively high uncertainty

## COVID-19: Surveying in Uncertain Times

On the pages to come, we present the results of a 20-question survey with moms about their expected 2020 BTS shopping. The coronavirus pandemic, of course, made it more challenging for moms to look ahead and predict how they'll shop for BTS this year.

**Yet, it remains a worthwhile exercise to ask households about their BTS expectations and intentions.**

Indeed, after the survey, we asked all 1,443 respondents, “In general, how confident are you about the answers you provided in this survey?” Despite the upheaval caused by COVID-19, and the precautions retailers, schools, and communities are taking against it, half (49%) said they were “completely confident” in their responses, while another 38% said they were “very confident.”

Thus, the moms themselves seem to think they can gauge, with some certainty, their 2020 BTS shopping behavior, even in a comparatively uncertain environment.





# Spending on BTS



# BTS Spending: More or Less?

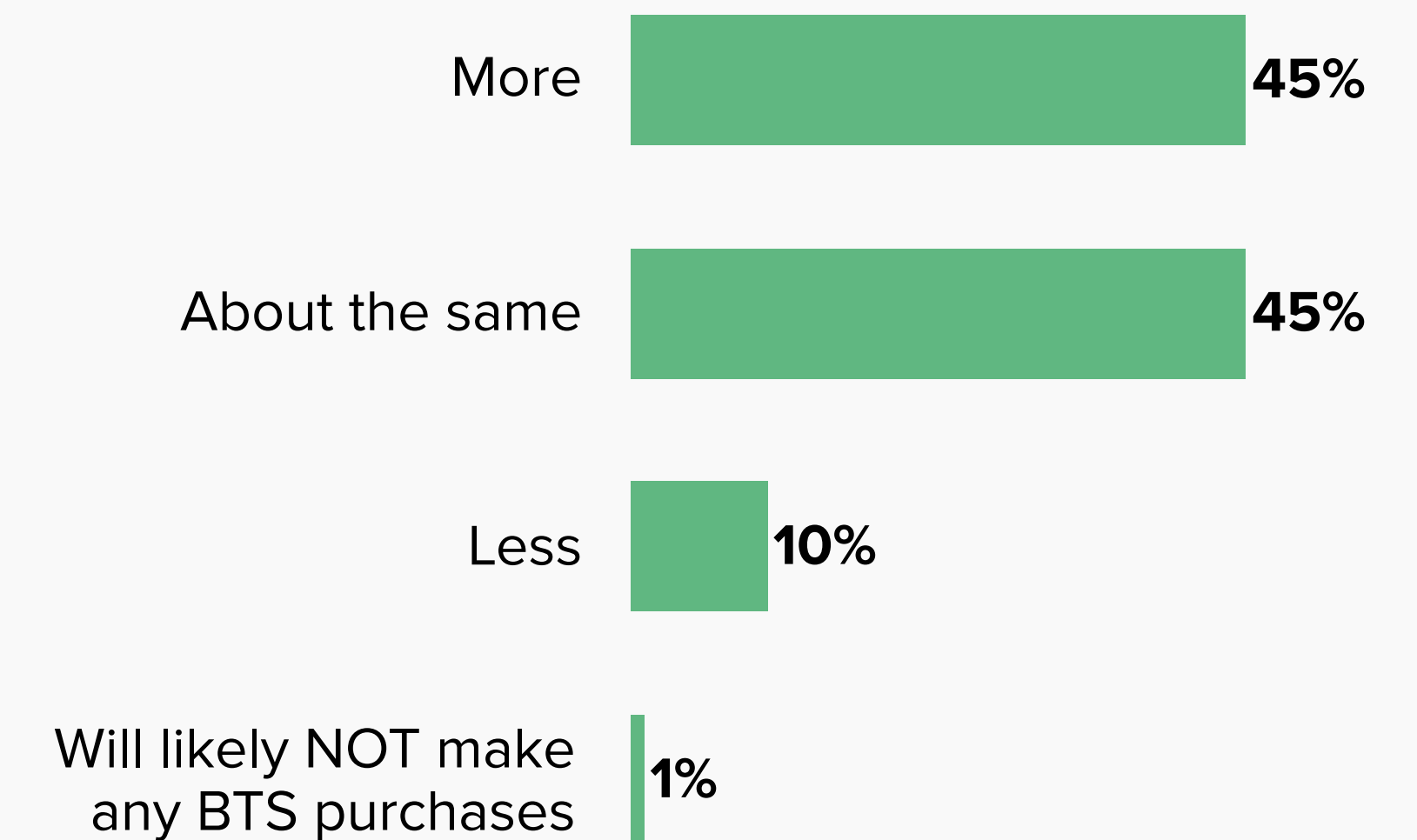
With every new BTS survey and report, we ask moms whether they expect to spend more or less on BTS purchases compared to the previous year. Consistently, year after year, moms report they expect to spend *more*. Though caution should be exercised in drawing comparisons year over year, 50% of moms said they would likely spend more in 2019, compared to 53% in 2018 and 50% in 2017. **This year, 45% of moms say they expect to spend more on BTS purchases.** Moreover, 5% of moms said they expected to spend *less* on BTS for each of the last *three* surveys. This year, 10% say they'll likely spend less. Seemingly healthy numbers for 2020, though, due to the pandemic and all it brings, the figures this year might reflect a slight dip in consumer confidence among moms.

## COVID-19 Insight:

Based on the information they have now and their best guesses about the coming school year, 45% of moms believe they'll spend more on BTS in 2020 compared to 50% in 2019



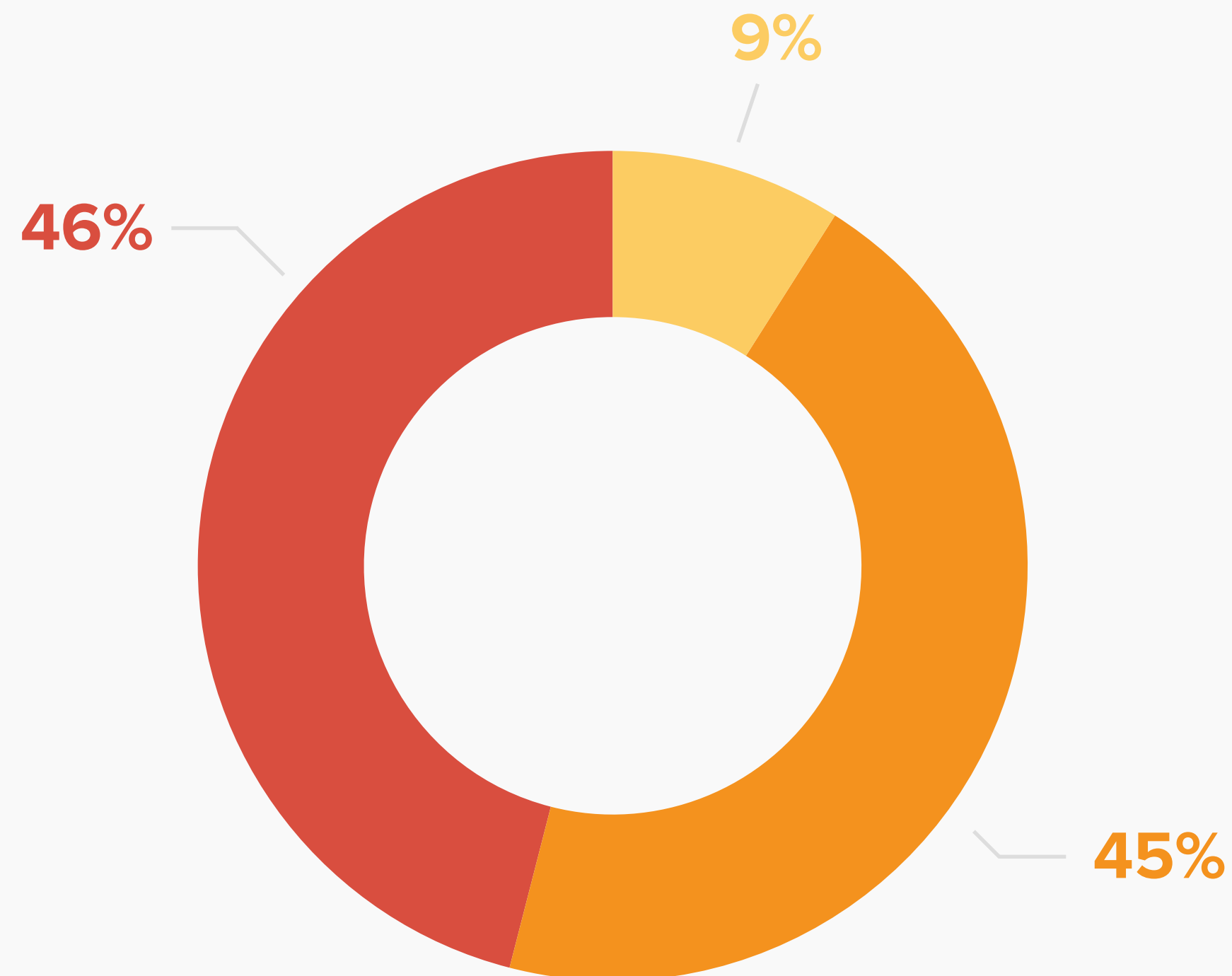
Compared to last year, do you expect to spend more or less on BTS shopping in 2020?



N = 1,443 moms; effective N = 1,210 moms



How much of your 2020 BTS shopping do you currently expect to complete during the sales tax holiday offered by your state (if applicable) or another state?



- I plan to shop BTS **ONLY** during the tax holiday
- I will make **SOME** school purchases during the tax holiday
- The tax holiday will **NOT** influence when I shop for BTS

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 = 986; effective N = 837)

## BTS Tax-Free Holiday

Another question we ask with each new BTS report: How will tax-free weekends or holidays influence households' BTS shopping? Results have been largely consistent over the years. For instance, 7% said they'd shop *only* during the BTS tax holiday in 2019, 2018, *and* 2017. Likewise, in 2019, 38% of moms answered that the tax-free holiday would not influence their BTS shopping at all, compared to 37% and 39% in 2018 and 2017, respectively. This year, in the wake of the pandemic, **9% say they'll shop only during the tax holiday**, and, significantly, **46% say tax-free shopping will *not* influence their BTS shopping**. With COVID-19 going around, maybe moms plan to avoid the crowds and lines that go along with tax-free weekends? **Again, it should be stressed, moms are basing their answers on the information they have right now and their best guesses about the coming school year. After all, states may not even offer tax-free holidays this year.**

### COVID-19 Insight:

For the past three BTS surveys (2017-19), between 37-39% of moms said tax-free holidays would not influence their BTS shopping, compared to 46% this year. Will moms bypass tax-free shopping during the COVID-19 outbreak?



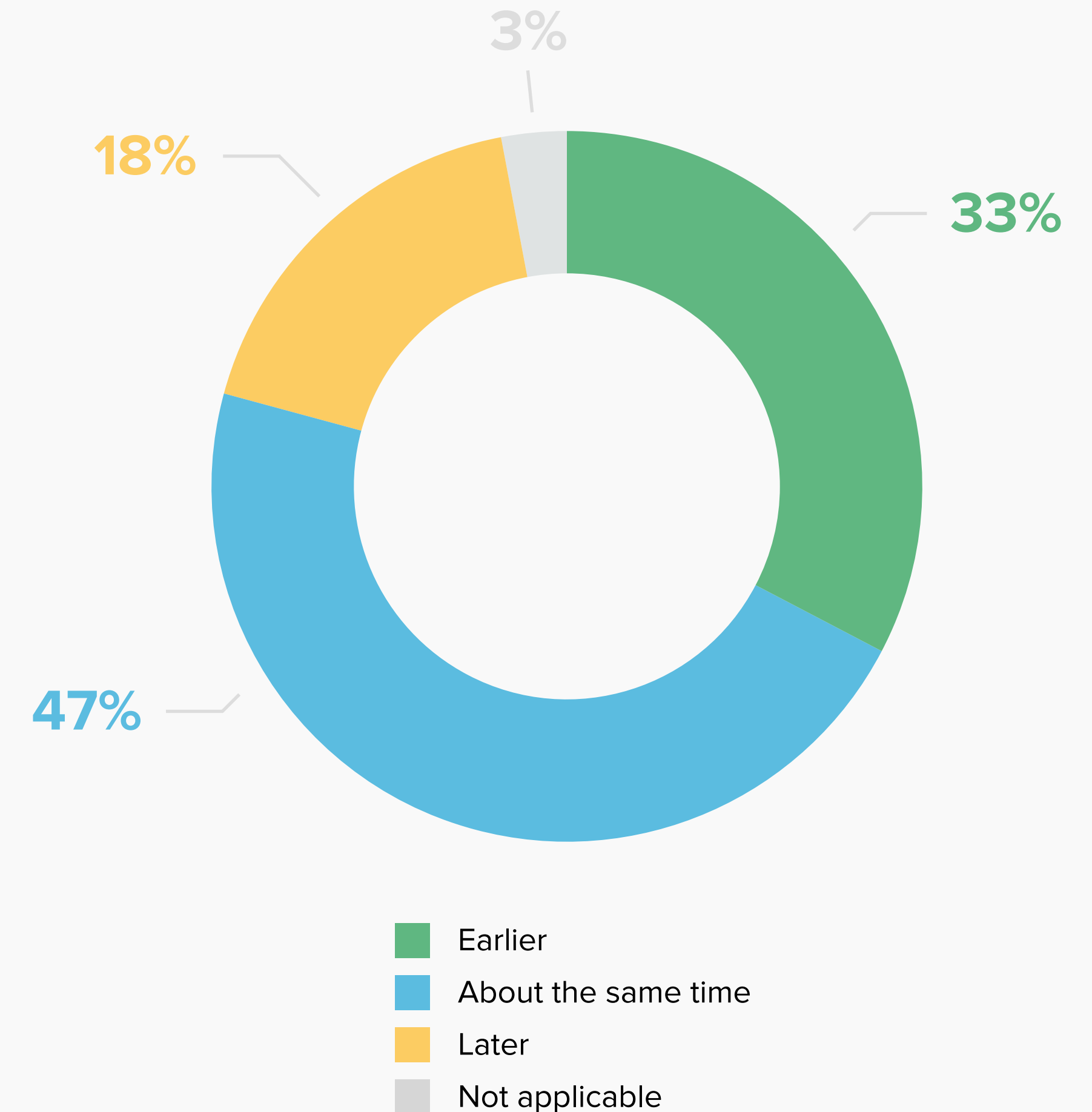
## BTS Shopping: Earlier or Later?

Let's stay on the "when" of BTS shopping. Amid the pandemic, and the palpable uncertainty surrounding the approaching school year, we wondered if moms would feel inclined to shop earlier or later this year for BTS supplies and attire. Close to half expect to shop BTS about the same time as last year, though 33% think they'll shop earlier (to avoid crowds and out-of-stocks) and 18% later (to ensure they know exactly what to buy and don't make needless purchases).

### COVID-19 Insight:

One-third of moms expect to shop for BTS supplies and attire earlier than last year. Based on their comments, this is most likely to avoid crowds and out-of-stocks

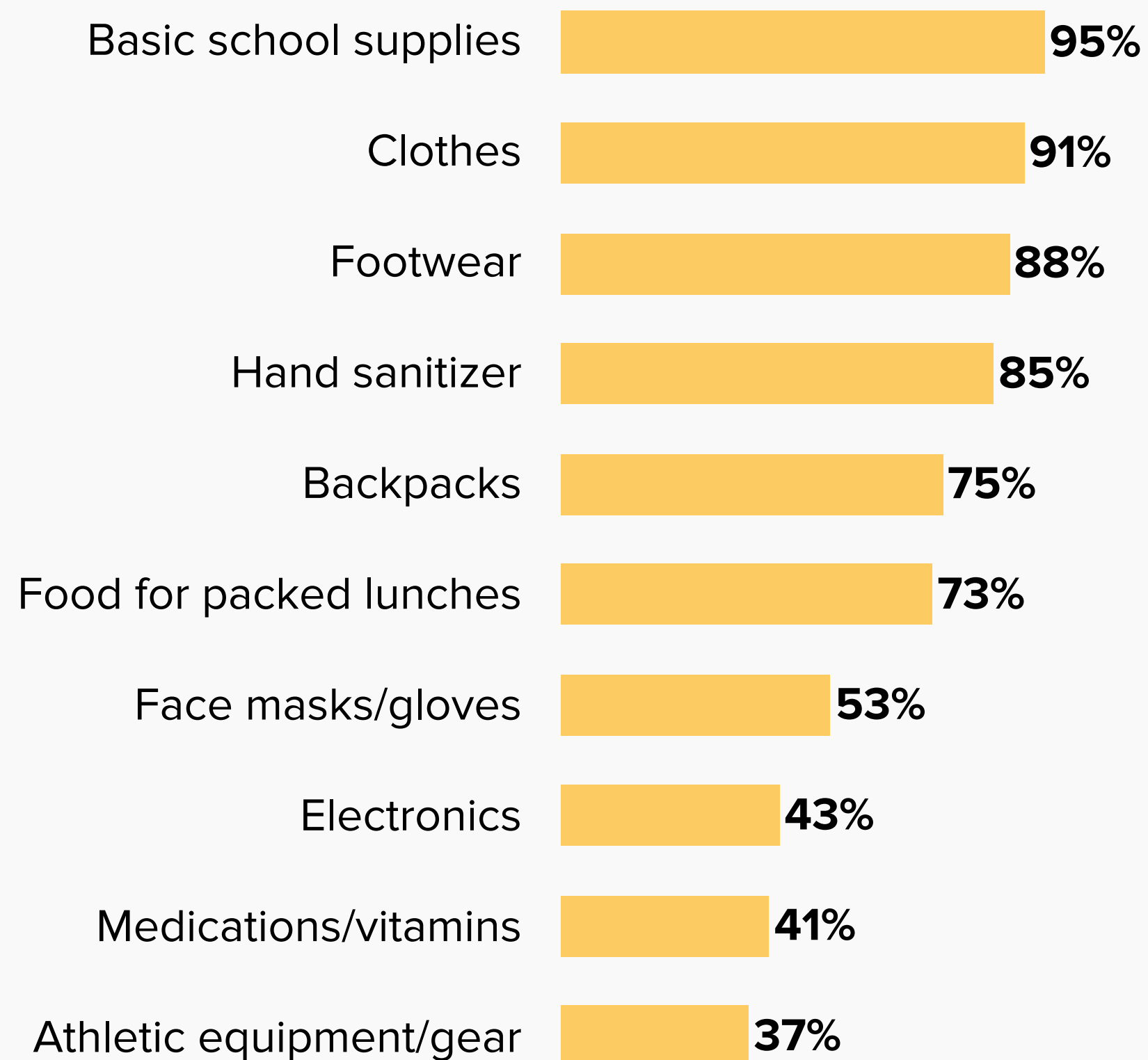
Compared to last year, when do you expect to shop for school supplies and/or attire for the 2020 BTS season?



N = 1,443 moms; effective N = 1,208 moms



Which of the following items do you currently expect to purchase for the upcoming school year?



N = 1,443 moms; effective N = 1,231 moms

## BTS Shopping: Probable Purchases

What exactly shoppers will buy for BTS 2020 is surrounded by question marks. That'll ultimately be based on decisions made in the coming weeks by school districts and communities. But, we can at least ask households what they *expect* to purchase, based on information currently available. As you can see, moms expect to make many of the same purchases this year. But, after comparing the results to past BTS reports, it seems COVID-19 could be affecting what BTS purchases moms expect to make. This year, 91% and 88% of moms anticipate making purchases of clothes and footwear, respectively, compared to 96% and 95% last year. In 2019, 87% of respondents said they expected to purchase backpacks (compared to 75% in 2020), 56% to purchase electronics (2020 = 43%), and 52% to purchase athletic gear (2020 = 37%). So, in certain categories, moms think forthcoming decisions by school districts could discourage them from making common, even annual, BTS purchases in particular categories.

### COVID-19 Insight:

85% of moms anticipate buying hand sanitizer, and 53% face masks/gloves, while shopping for BTS in 2020



# Supplying BTS





**How many stores will your household probably visit to purchase school supplies for BTS 2020?**



N = 1,443 moms; effective N = 1,207 moms

# Store Trips for BTS Supplies

Despite concerns about the spread of the coronavirus, some 99% of moms still plan to visit at least one brick-and-mortar store to purchase school supplies for BTS 2020. Of course, this is based on what they know now. The numbers closely resemble the results in our 2019 and 2018 BTS reports. Only 1% said they wouldn't visit any stores for supplies this year, compared to 0% the last two years.

**COVID-19 Insight:**

At this point, moms don't expect COVID-19 to deter them from hitting stores for BTS school supplies. 99% expect to visit at least one B&M retailer



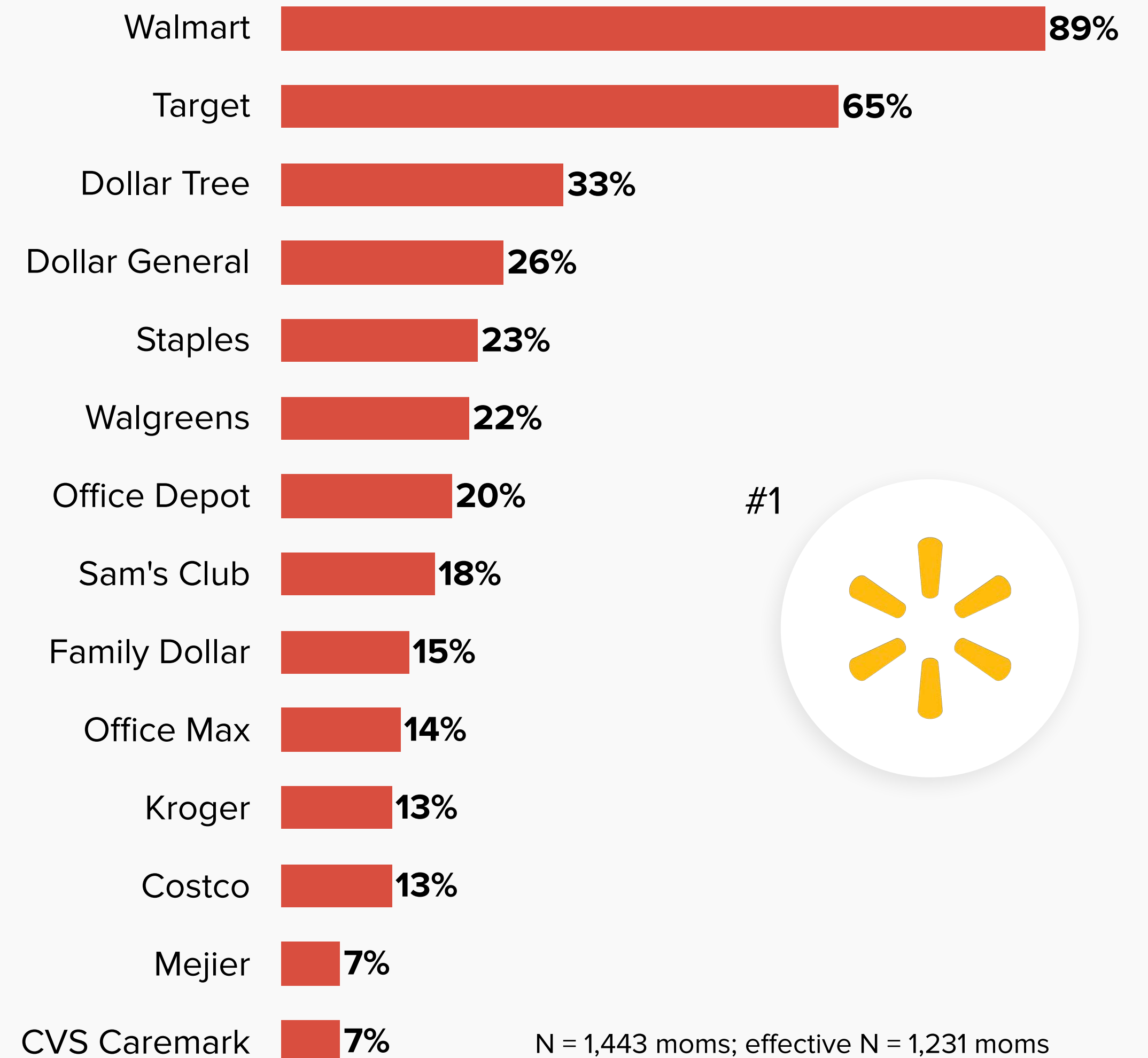
# Top Stores for BTS Supplies

Walmart perennially is the most popular brick-and-mortar retailer for BTS supply purchases. Walmart took a slight hit in this year's survey, perhaps due to the coronavirus and the aversion some have toward large crowds right now. **In 2019, 93% of moms surveyed said they'd visit Walmart for school supplies, compared to 89% this year.** But, clearly, Walmart remains the undisputed king of BTS supplies. Target, in second place, remained largely steady between our 2019 and 2020 surveys.

## COVID-19 Insight:

Pandemic or not, barring a major unforeseeable event, Walmart should once again fare very well with BTS shoppers purchasing school supplies

Identify all the brick-and-mortar STORES from which you'll likely purchase SCHOOL SUPPLIES for BTS 2020?

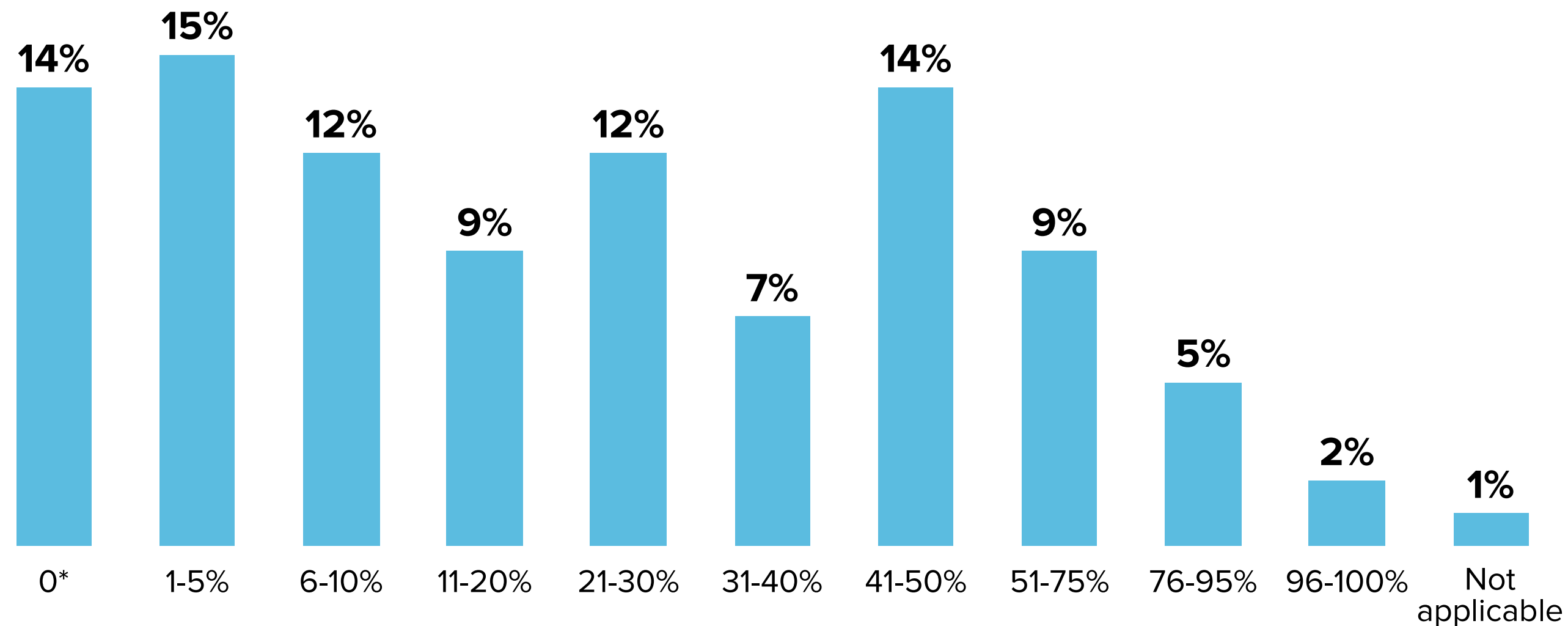




# Online Shopping for BTS Supplies

Now this is interesting. In 2018, 26% of moms said they'd purchase absolutely none of their BTS school supplies online. In 2019, that number ticked up to 28%. But this year, with the outbreak on everyone's minds, the number fell 100% YOY to 14%. At the same time, **the number of moms planning to purchase half or more of their kids' supplies online went from just 4% in 2019 to 16% this year.** Though they still intend to visit stores for BTS supplies, moms also anticipate shopping online somewhat more, perhaps to spend less time in stores.

Approximately what percentage of school supplies do you estimate your household will purchase **ONLINE** for BTS 2020?



\*Will buy supplies but none online N = 1,443 moms; effective N = 1,229 moms

## COVID-19 Insight:

Expect more moms to shop online for school supplies in 2020. This year, 86% said they expect to purchase at least some supplies online, compared to 72% last year



# Top Online Retailers for BTS Supplies

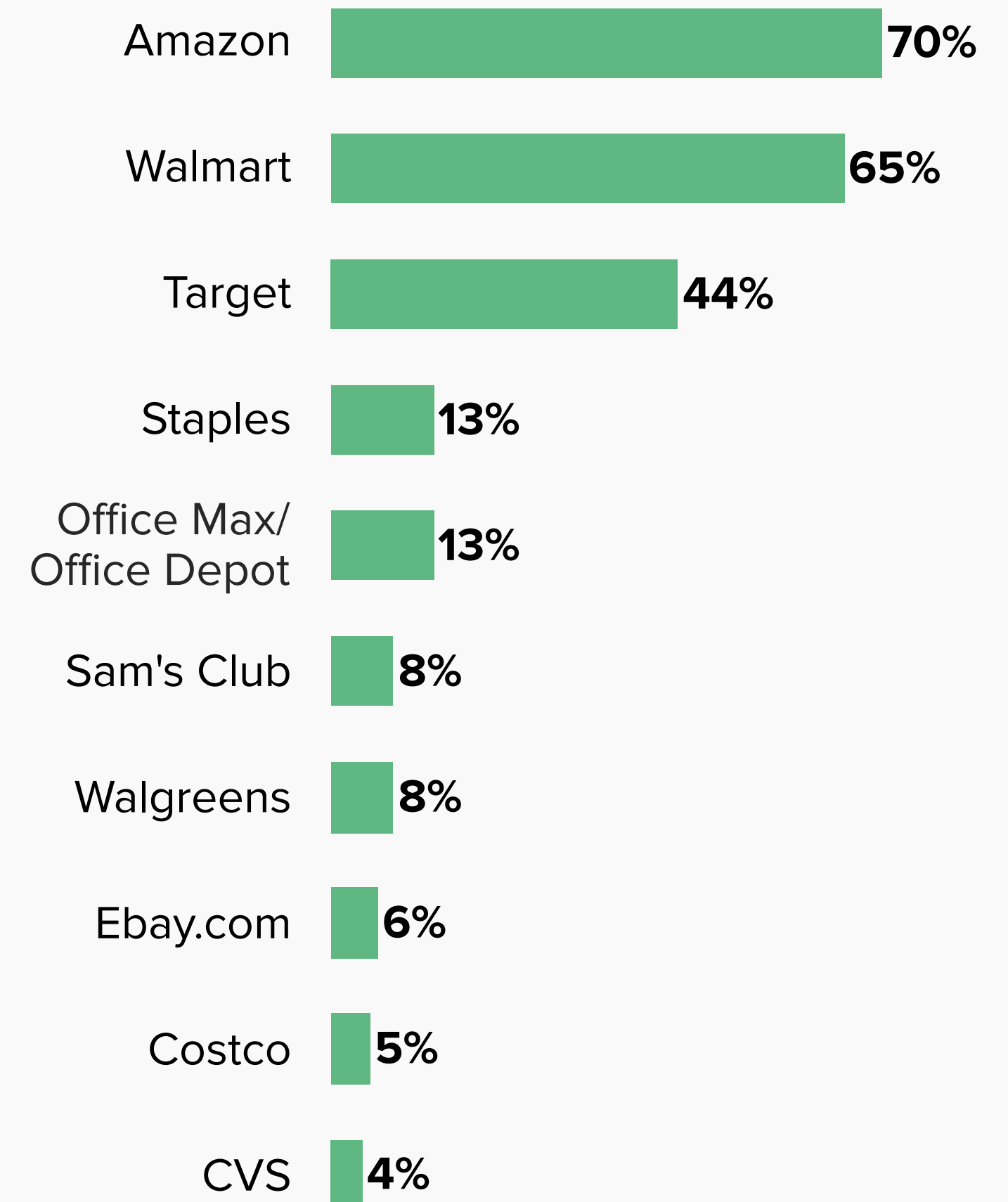
Amazon is regularly the top online destination for school supplies. This year, 70% of moms said they'd purchase school supplies from Amazon, compared to 79% in 2018 and 74% in 2019. Walmart went from 52% in 2018 to 59% in 2019 to, this year, 65%, or almost neck and neck with Amazon. Maybe this reflects Walmart's growing ecommerce and pickup prowess. Whatever it is, Walmart may be gaining ground on Amazon as an online destination for school supplies. Next year's results will be interesting.



## COVID-19 Insight:

Like most years, Amazon will likely be the top online destination for school supplies this year, but Walmart is closing the gap by flexing its ecommerce and pickup muscles

## Which ONLINE RETAILERS do you expect to purchase SCHOOL SUPPLIES from for the 2020 BTS season?



N = 1,240 moms who plan to purchase supplies online;  
effective N = 1,006 moms



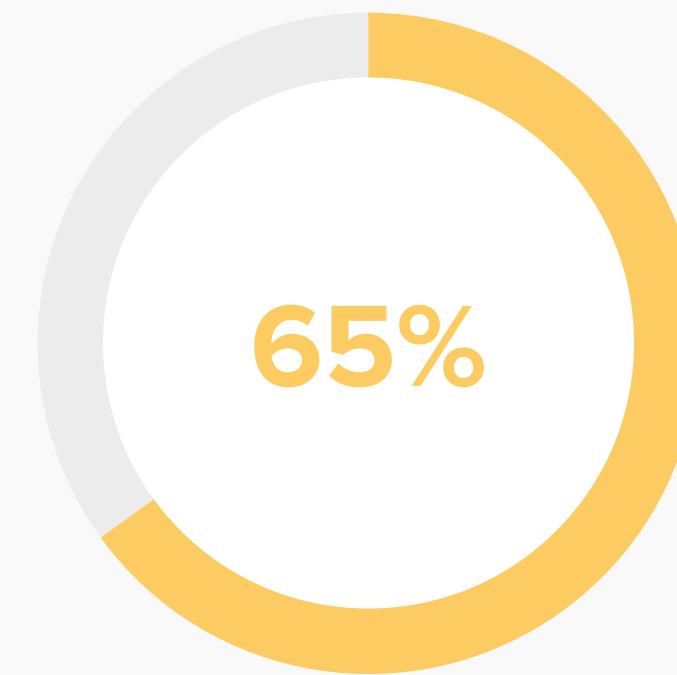
# Delivery or Pickup?

For households that expect to purchase school supplies online this BTS season, both package delivery and store pickup ticked up a few points over last year. The survey did not reveal a major boost for pickup amid the coronavirus outbreak. Last year, 54% of respondents said they were at least moderately likely to use pickup to obtain school supplies, compared to 56% this year.

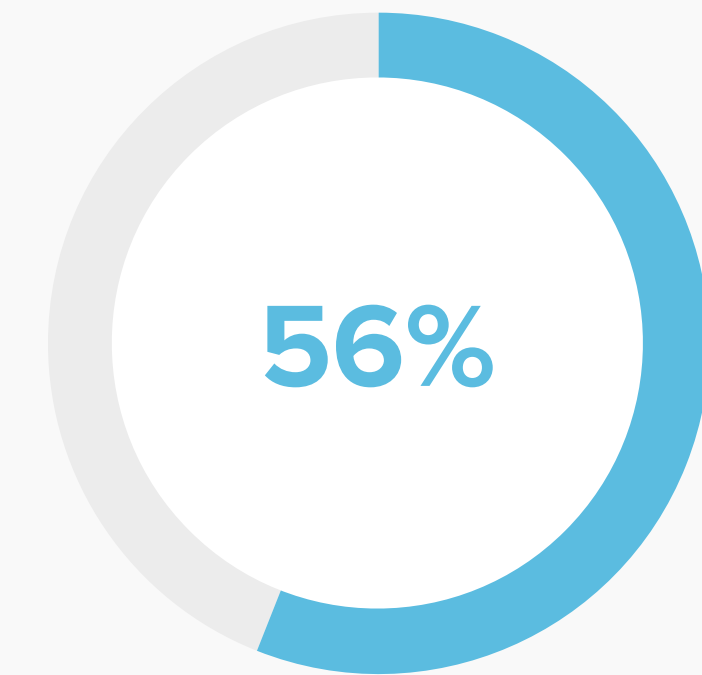
## COVID-19 Insight:

Even in the age of coronavirus, moms purchasing school supplies online still seem to prefer package delivery over store pickup

Which of the following methods are you at least moderately likely to use to obtain SCHOOL SUPPLIES for the 2020 BTS season?



Online/in-app ordering for package delivery to your home



Online/in-app ordering for in-store or curbside pickup at a store

N = 1,240 moms who plan to purchase supplies online; effective N = 1,058 moms



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# Feeding BTS



# Meal/Snack Plans

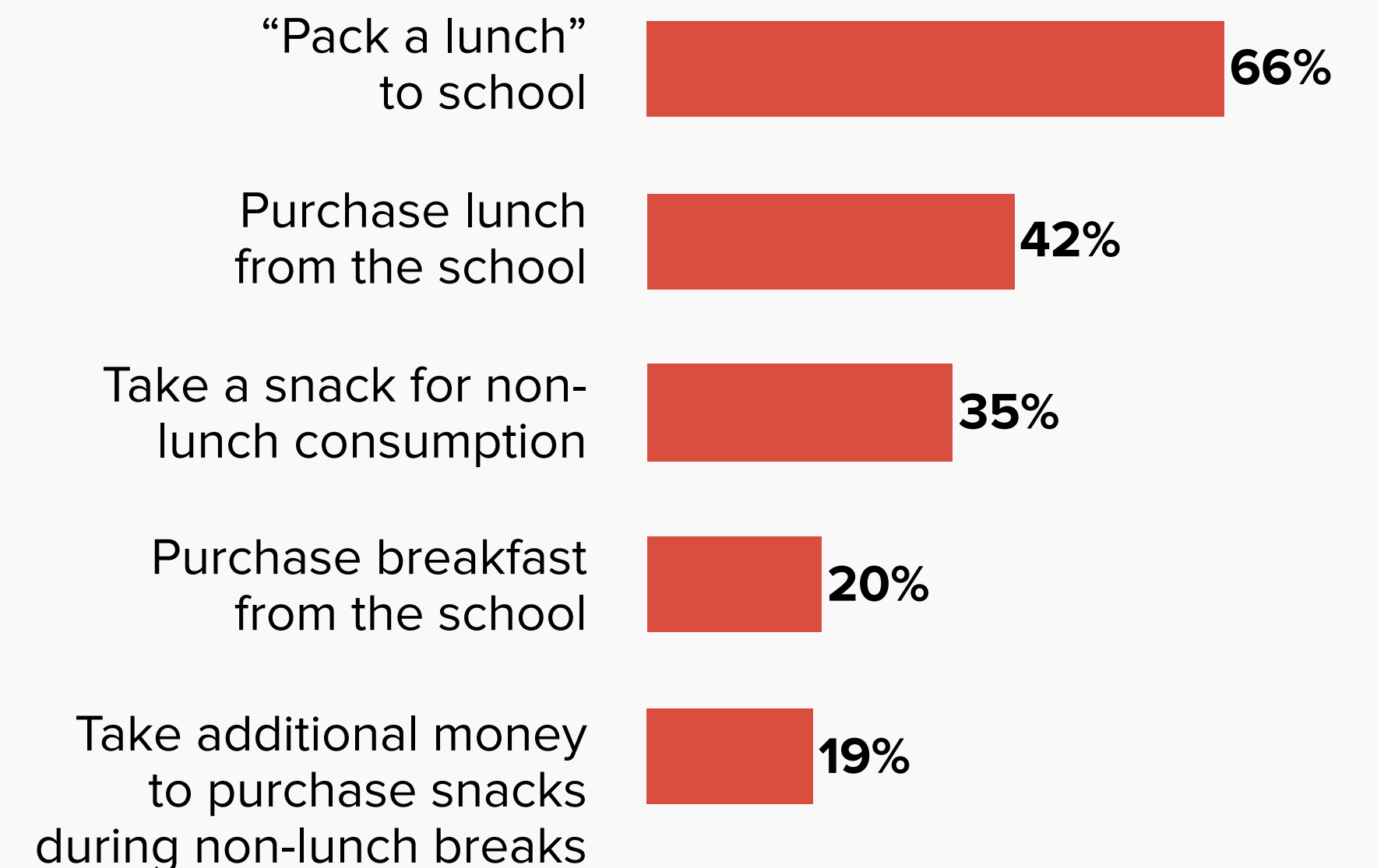
Questions about meal/snack plans are particularly difficult to answer right now. After all, many parents don't even know if their kids will be returning to campus. So, when we asked moms to identify their kids' meal/snack plans for the upcoming school year, we also asked them to **“assume students will be allowed to return to school campuses in the fall and will be permitted to purchase lunches at school.”** This year, 66% of moms say they expect to “pack a lunch” when sending kids to school, compared 69% last year.



## COVID-19 Insight:

66% of moms say their kids will pack a lunch to school this year, assuming they return to campus and have the option to purchase lunch from the school

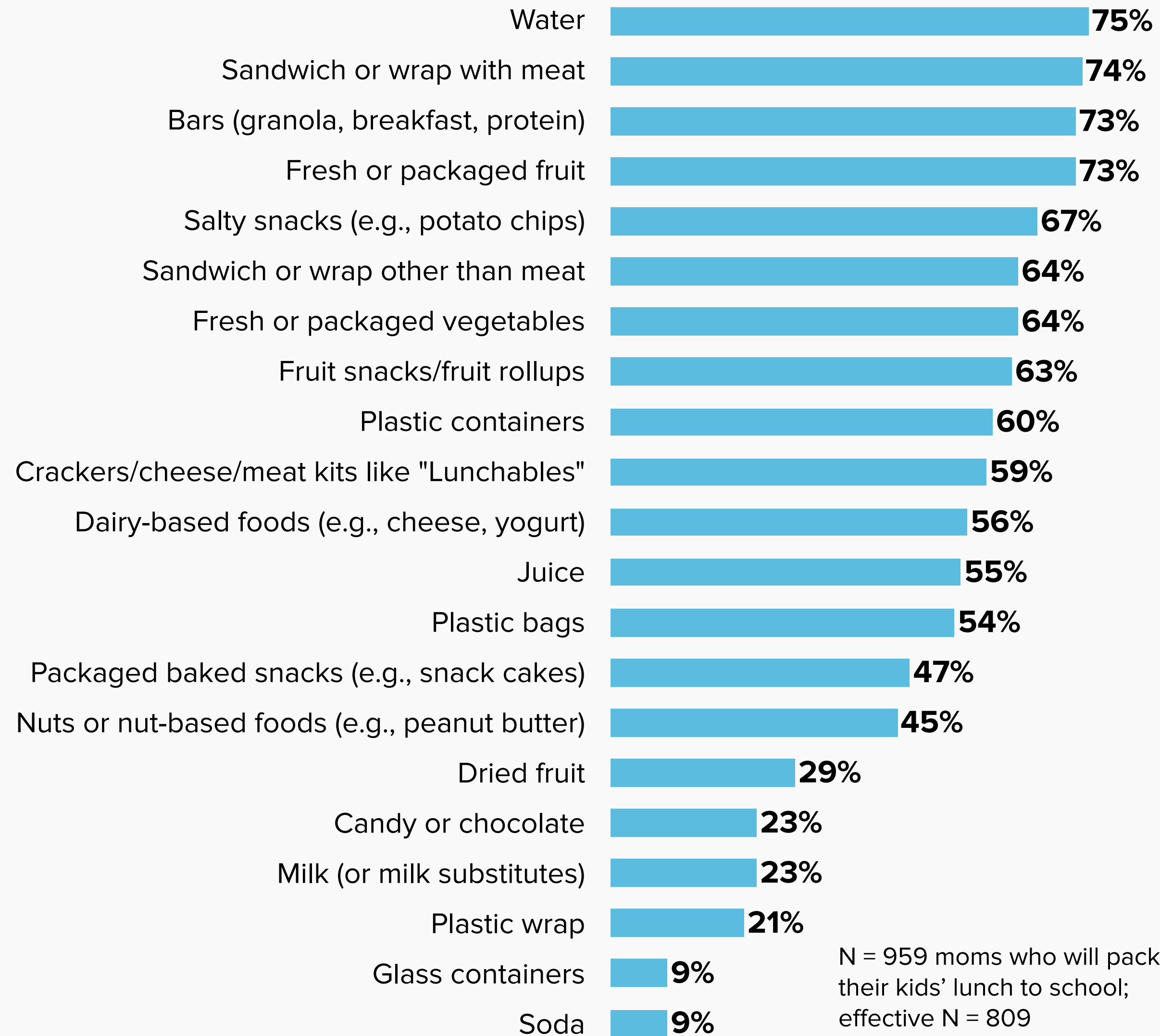
**Assuming students will return to campus in the fall and be permitted to purchase school lunches, which statement best describes your children's MEAL/SNACK PLANS for the upcoming school year?**



N = 1,443 moms; effective N = 1,225 moms



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



# Packed Lunches

So what will be in all those packed lunches? As you can see, water, meat sandwiches/wraps, granola/breakfast/protein bars, and fruit are all very popular for packed lunches.



## COVID-19 Insight:

IF kids are back on campus in the fall, expect packed lunches to commonly contain water, meat sandwiches, snack bars, and fruit



## Demo Cancelled for BTS Season? Demo Anyway.

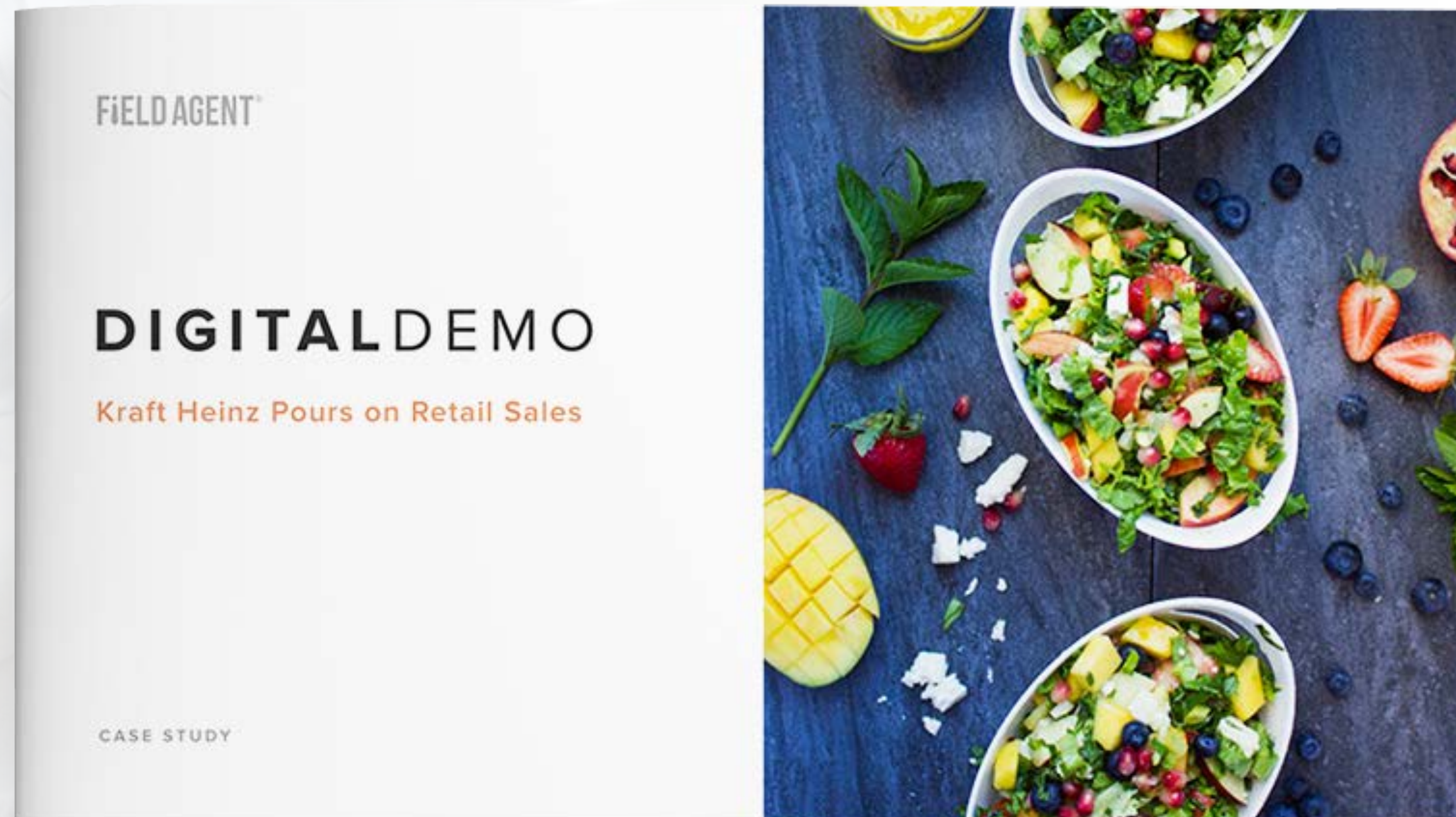
Back to School is a crucial, make-or-break season for many companies. This year, some brands are wondering how to elicit trial of their products, in an environment with no demos or free samples.

Wonder no longer.

Digital Demos by Field Agent enlist real shoppers to purchase, try, and even provide feedback about groceries, school supplies, or practically any other product sold through stores, websites, or apps.

They're a fast, affordable, innovative way to drive first purchase of products...even when demos and samples aren't an option.

[Download Case Study](#)



[See How Kraft-Heinz Poured on Retail Sales with Digital Demo](#)



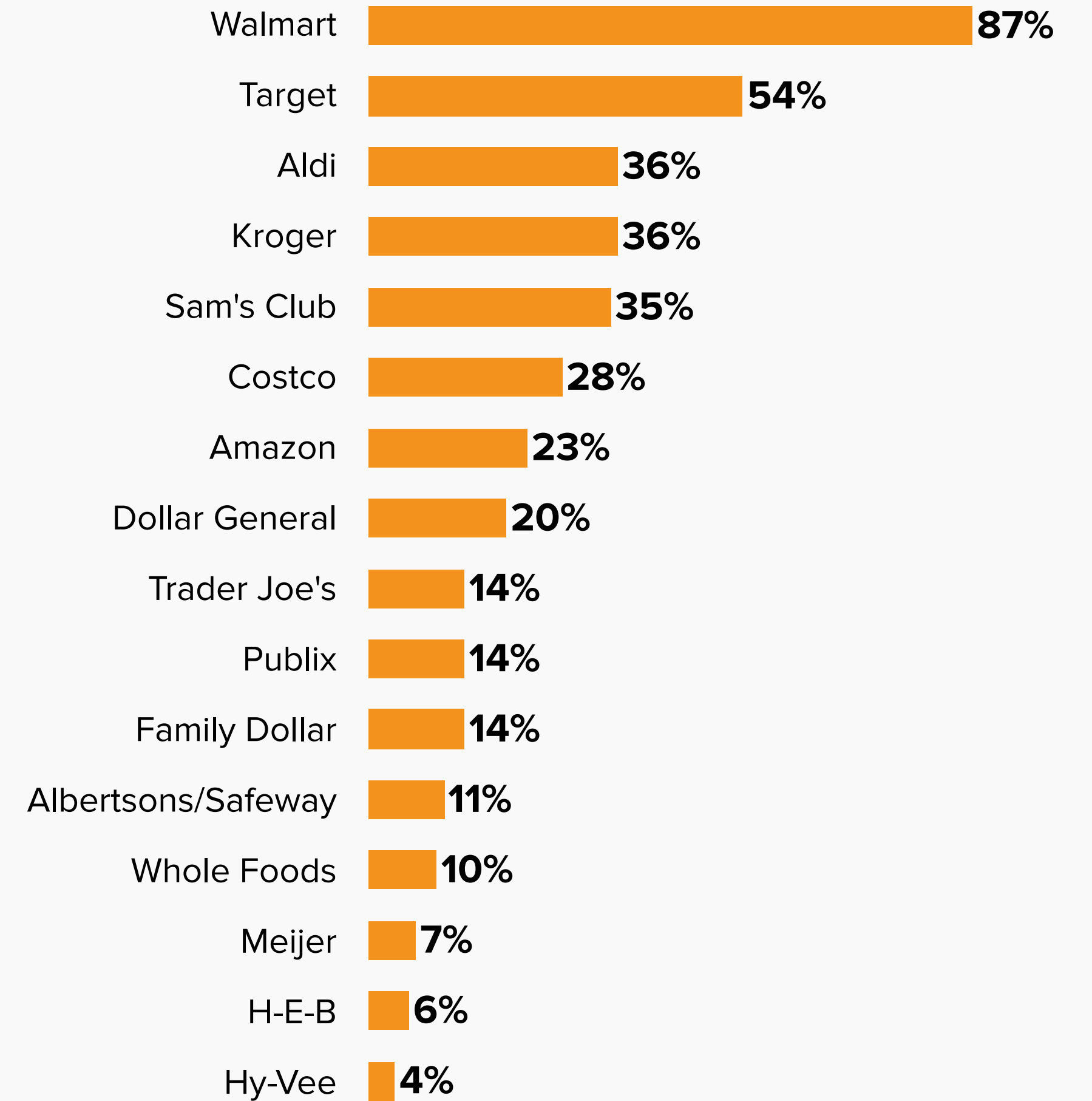
# Lunch Retailers

Where households will get their groceries for packed lunches, well, that hasn't changed much from last year. With perhaps one exception. The pecking order this year, like last year, is Walmart, Target, Aldi, and Kroger. Amazon showed the biggest change YOY, up 6 percentage points from 2019. Maybe this reflects the desire of some moms to reduce their store time amid the outbreak?



**COVID-19 Insight:**  
 23% of moms say they'll purchase groceries/supplies for packed lunches from Amazon, up from 17% last year

## From which retailers will you likely purchase groceries for your kids' packed lunches during the 2020-21 school year?



N = 959 moms who will pack their kids' lunch to school;  
 effective N = 822



# Clothing BTS





# Buying Clothes/Footwear?

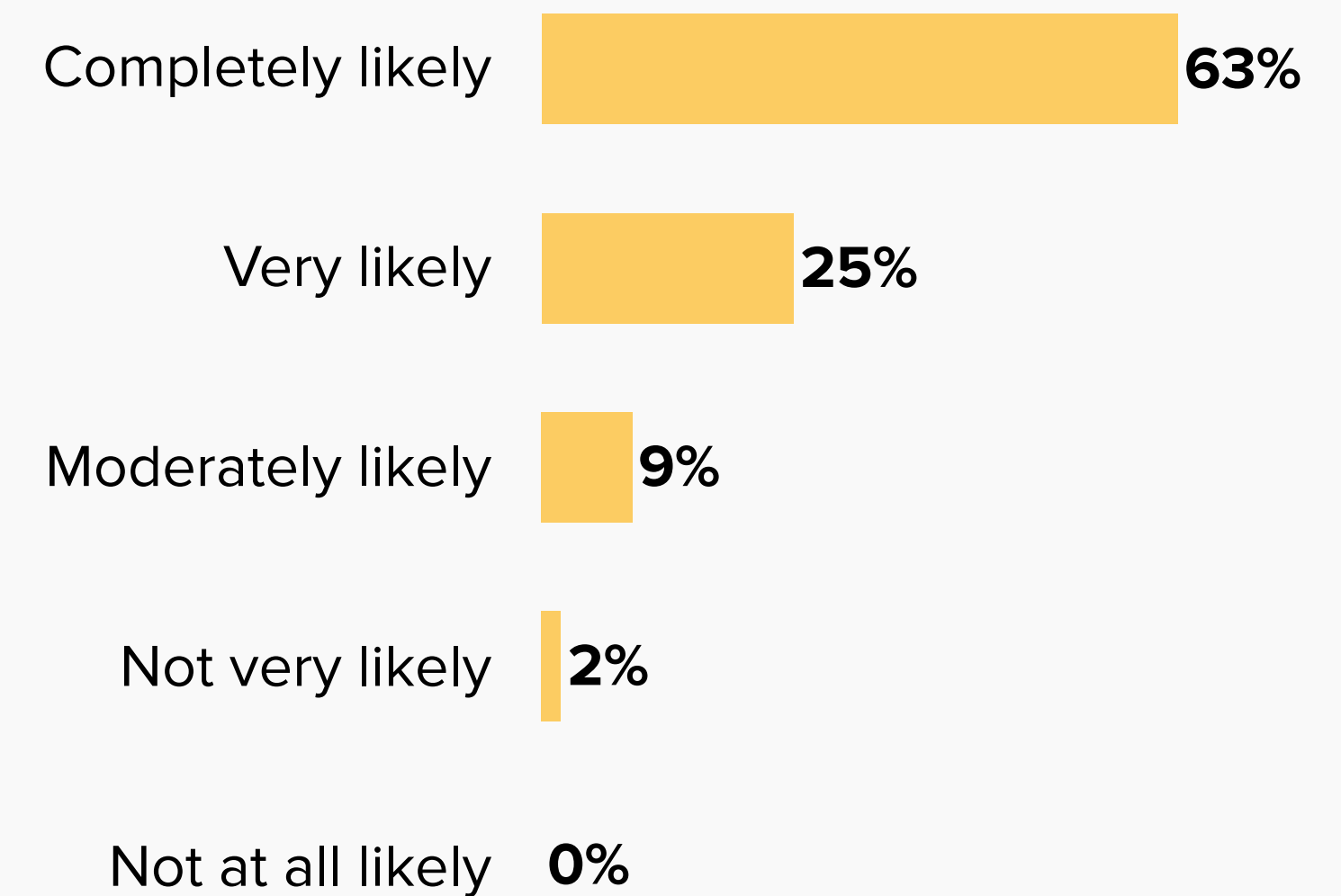
Here's a pressing question: Are households planning to purchase new clothes and footwear during the upcoming BTS season? BTS and attire purchases *usually* go hand-in-hand. But with campus closures and widespread homeschooling still a real possibility, perhaps parents will be inclined to hold off on purchases of new clothes and/or footwear?

**Based on the information they have right now and their best guesses about the coming school year**, the majority of moms in our survey do *not* expect to break precedence from previous BTS seasons. Fully 63% say they're completely likely, and another 25% very likely, to make attire purchases this year. Notably, 0% say they're not at all likely.

## COVID-19 Insight:

Based on the information they have right now, 88% of moms expect to purchase BTS clothes/attire this year, pandemic or not

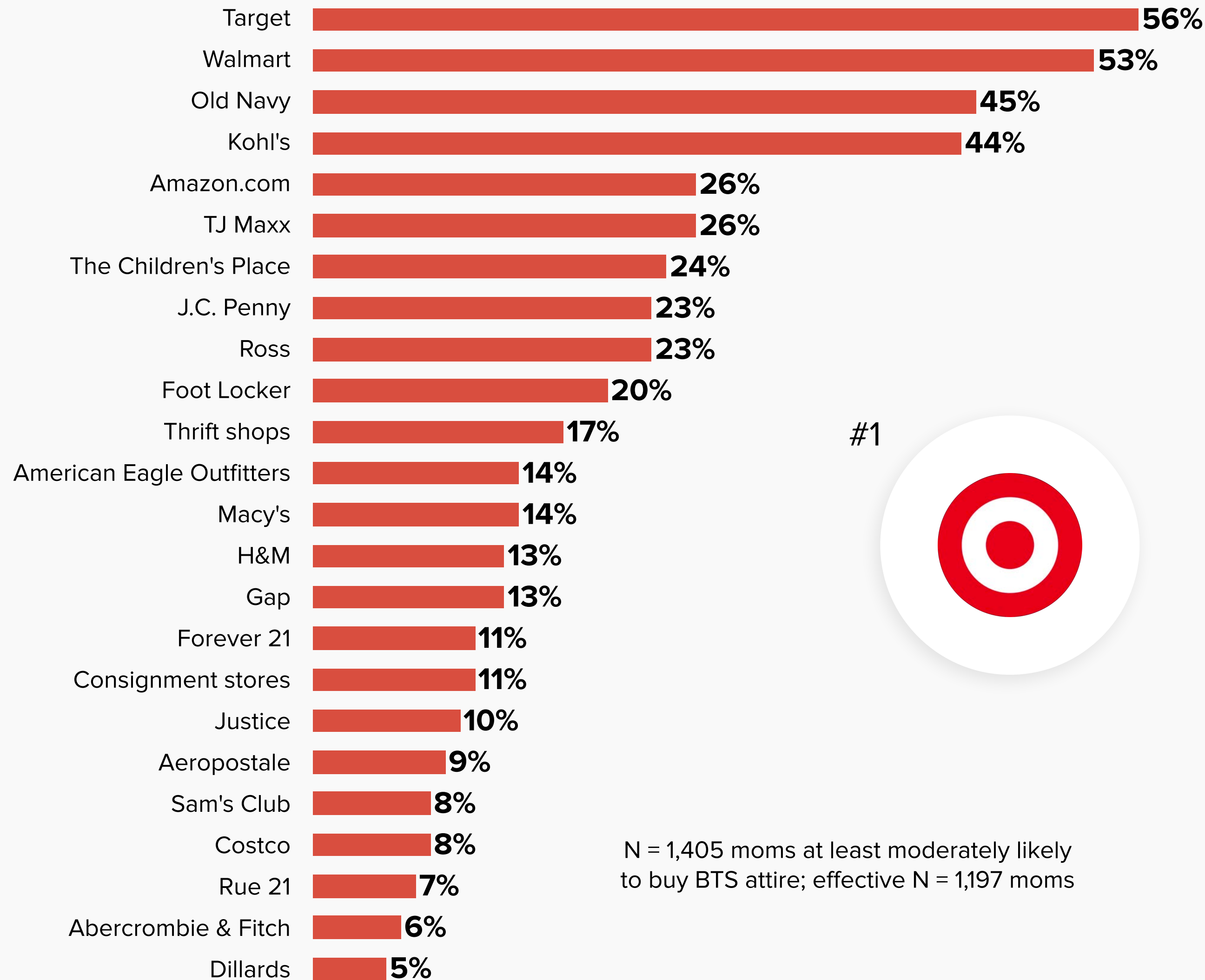
**How likely are you to purchase clothes and/or footwear for your kids during the 2020 BTS shopping season?**



N = 1,443 moms; effective N = 1,233 moms



**Which retailers (brick-and-mortar and/or online) will you likely purchase clothing/footwear from for BTS 2020?**



N = 1,405 moms at least moderately likely to buy BTS attire; effective N = 1,197 moms

# BTS Attire Retailers

Like last year, Target, Walmart, Old Navy, and Kohl's top the list for purchases of BTS clothes and footwear. Amazon's popularity as a destination for BTS attire rose three percentage points over 2019, good enough for a top five showing.

### COVID-19 Insight:

The more things change, the more they stay the same. Moms expect to once again make Target the top destination for BTS attire



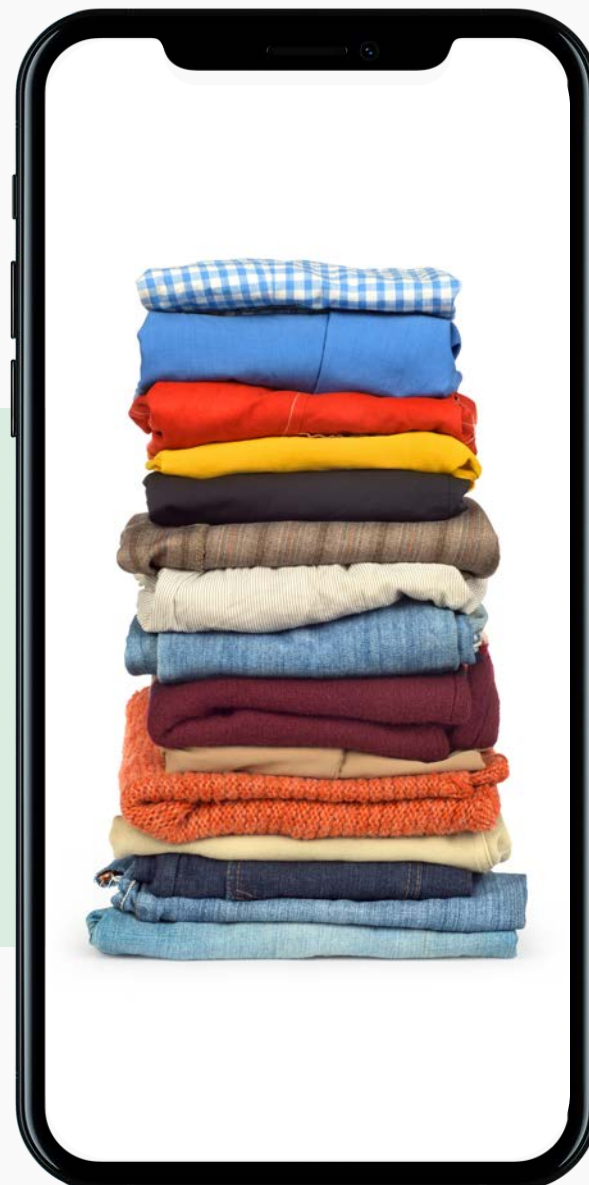
See inside the CX at Target and Walmart



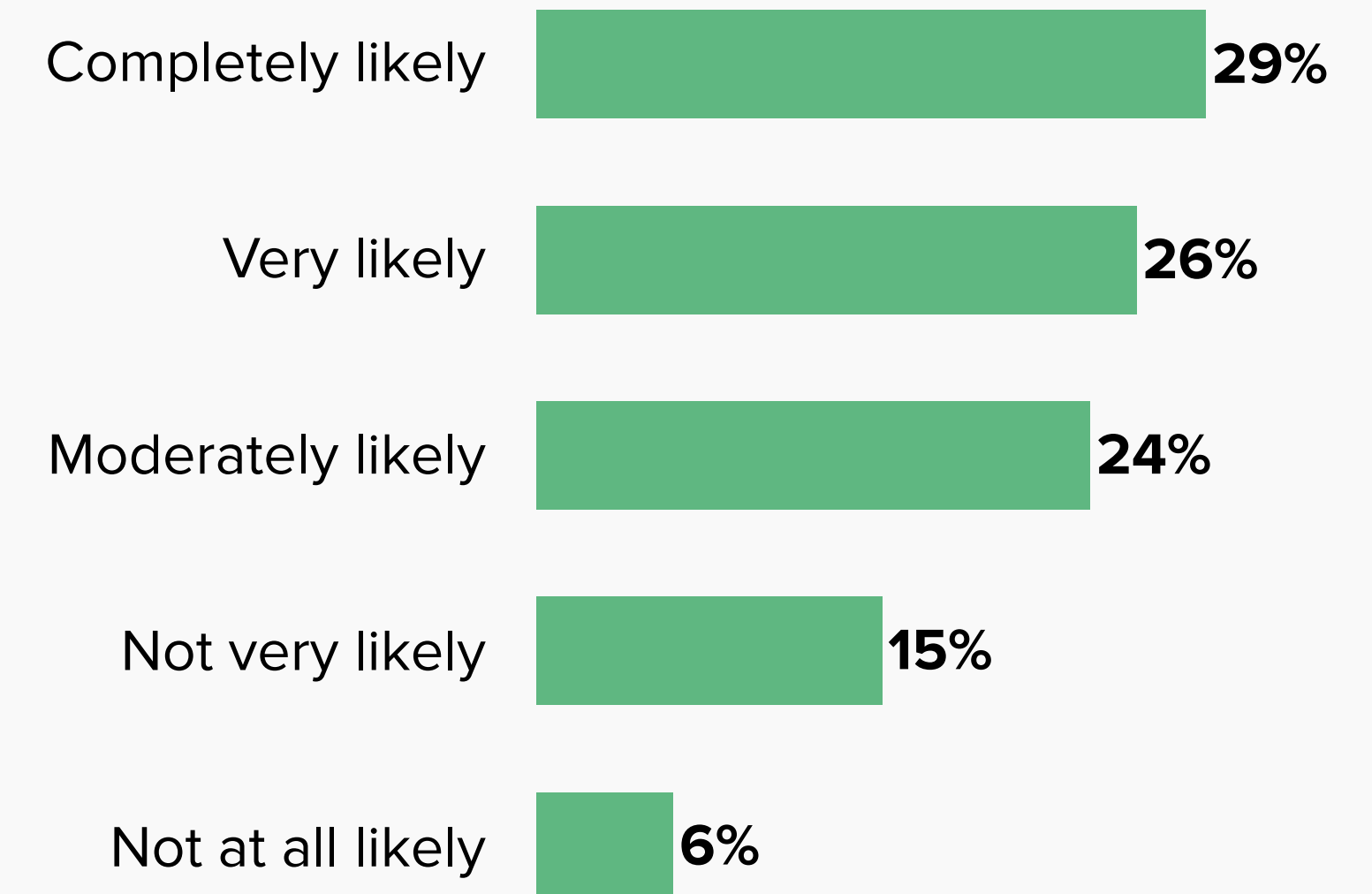
# Online Clothing?

Amid the outbreak, one has to wonder, “Will households purchase more attire online this BTS season?” Based on their current predictions, moms do appear to be more likely this year to buy BTS clothes/footwear online. This year, more than half of moms, 55%, say they’re completely or very likely to shop for BTS attire online, compared to 39% last year. Moreover, in 2020, just 21% said they’re not very or not all likely to buy BTS clothes/footwear online, which is down 11 points from 32% in 2019.

**COVID-19 Insight:**  
55% of moms say they’re completely or very likely to buy BTS attire online this year, compared to 39% last year



## What is the likelihood you will purchase clothing/ footwear online for BTS 2020?



N = 1,405 moms at least moderately likely to buy BTS attire; effective N = 1,197 moms





# **BTS & COVID-19**



# COVID-19: Questions about BTS Shopping

Prior to our survey of 1,443 moms, Field Agent first administered a free form, qualitative survey to 100 moms of K-12 kids. It was an opportunity to understand moms' questions, expectations, concerns, and suggestions about the upcoming BTS season before crafting the questions and choice options for the larger survey. We learned a lot.

From the results of this unstructured survey, it's clear that a lot of uncertainty surrounds the approaching 2020 BTS shopping season. Moms were full of questions.

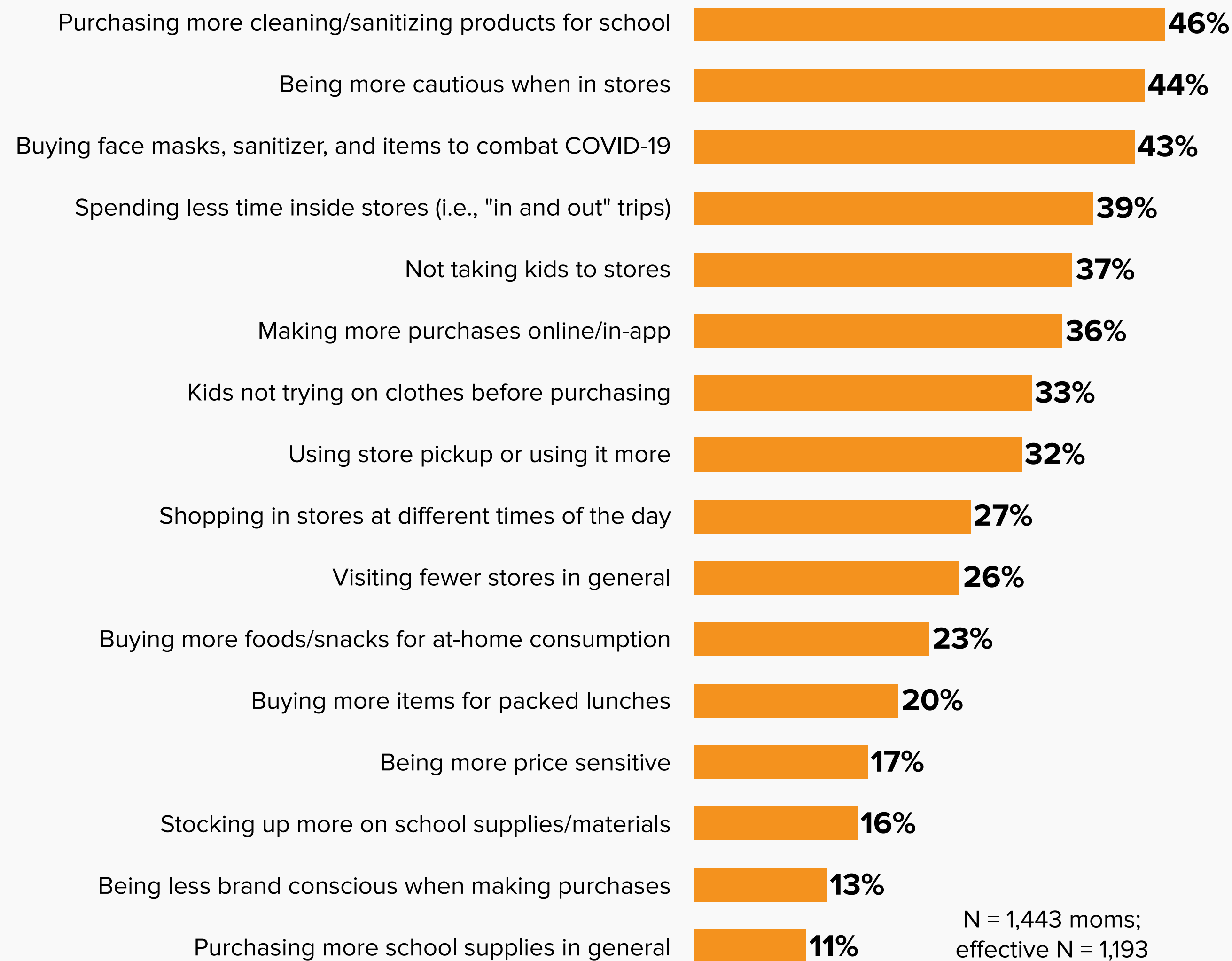
Here are just some of the questions and uncertainties moms expressed during the initial, qualitative survey. As you can see, BTS shoppers are entering the second biggest shopping season of the year—traditionally—with many apprehensions.

## Questions Mom is Asking about BTS Shopping...

- Will students be back on-campus in the fall?
- Will my kids be able to try on clothes in stores?
- Will we be required to purchase sanitizer/face masks/gloves?
- Will other shoppers hoard essential BTS supplies?
- Will there be a tax holiday?
- Will my kids be required to pack a lunch to school?
- Will products be more expensive due to high demand?
- Will I need to purchase electronics for virtual learning?
- Will my kids need a new backpack?
- Will BTS sales be available online?
- Will my kids be sharing supplies with others?
- Will I be able to take my kids to stores?
- Will I need to shop earlier/later than normal?
- Will schools have before/after school programs?
- Will I be preparing lunch at home?
- Will all the typical stores be open for BTS?
- Will large crowds/lines be unsafe?
- Will we need to buy athletic/gym gear?
- Will I have a job to afford BTS expenditures?



### How do you expect your BTS shopping to differ from last year?



## COVID-19: Changes to BTS Shopping

In all, 71% of moms surveyed said the coronavirus pandemic will force them to change at least one thing about the way they shop for BTS this year. We asked moms to identify how their 2020 BTS shopping will differ from last year. The chart shows all the choices selected by at least 10% of respondents.

### COVID-19 Insight:

Due to COVID-19, 71% of moms say their 2020 BTS shopping will differ from last year



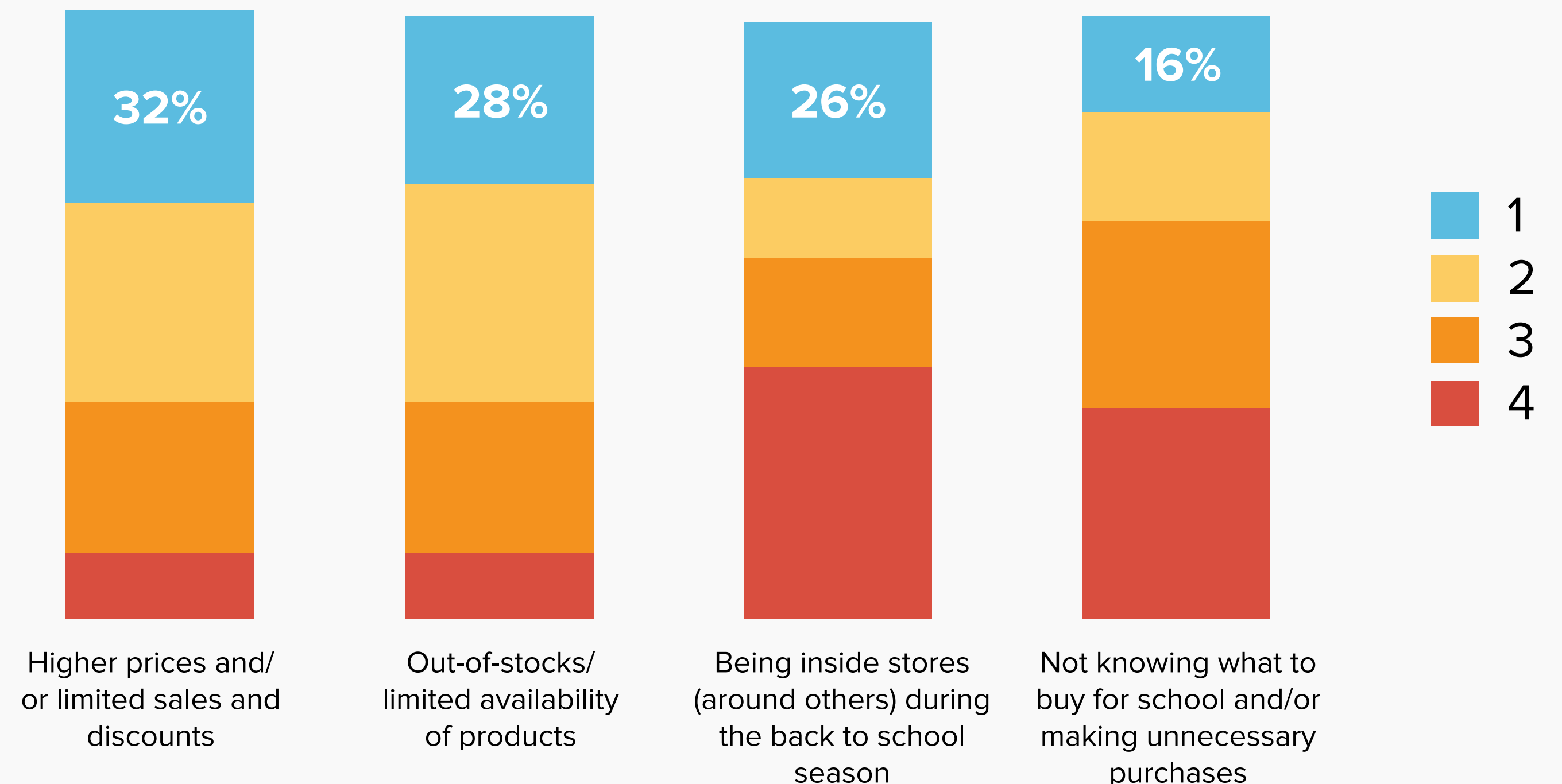
# COVID-19: BTS Shopping Concerns

In the pre-survey of 100 moms, we identified several concerns respondents are feeling about the approaching BTS shopping season. We took the four most common concerns and then presented them to the larger sample of 1,443 moms. These moms ranked each concern by their salience. As you can see, the specter of high prices/limited sales is most concerning to many moms, followed closely by out-of-stocks.

## COVID-19 Insight:

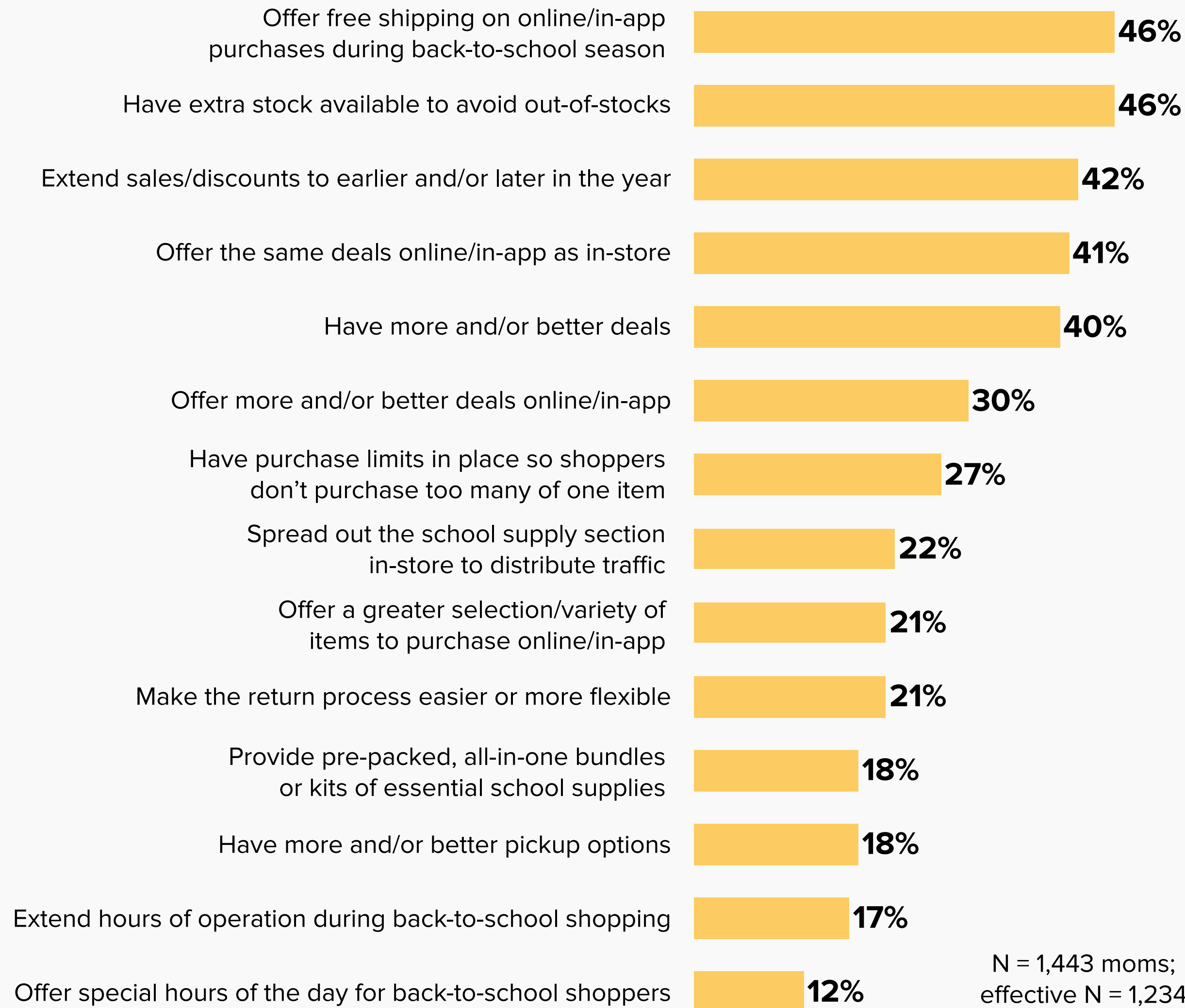
Higher prices and out-of-stocks are big concerns for BTS moms this year

Rank the following by how much they concern you entering the 2020 BTS season, where 1 is your greatest concern





**Choose up to 5 suggestions you'd most like retailers to implement for BTS 2020**



## COVID-19: BTS Suggestions for Retailers

In the qualitative survey of 100 moms, we asked moms to offer suggestions to retailers about 2020 BTS shopping. We then presented many of these suggestions to the full sample of 1,443 moms and asked them to identify their top 1-5 suggestions, or the suggestions they most wish retailers would implement to make BTS shopping better this year. Here are the suggestions selected by at least 10% of respondents.

### COVID-19 Insight:

More than anything, moms are hoping for free shipping and few out-of-stocks this BTS season





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

How will your brand perform with BTS shoppers in 2020? Download Field Agent's "***BTS Success Checklist***" to get a quick gauge.

[Download Free Checklist](#)



# 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>30%</b>
35-44	<b>50%</b>
45+	<b>20%</b>

## Household income:

Under \$35K	<b>20%</b>
\$35-49K	<b>17%</b>
\$50-74K	<b>24%</b>
\$75-99K	<b>17%</b>
\$100K+	<b>21%</b>

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

Boy(s) entering Kindergarten-2nd grade	<b>27%</b>
Boy(s) entering 3rd grade-5th grade	<b>20%</b>
Boy(s) entering 6th grade-8th grade	<b>17%</b>
Boy(s) entering 9th grade-12th grade	<b>20%</b>
Girl(s) entering Kindergarten-2nd grade	<b>24%</b>
Girl(s) entering 3rd grade-5th grade	<b>18%</b>
Girl(s) entering 6th grade-8th grade	<b>16%</b>
Girl(s) entering 9th grade-12th grade	<b>21%</b>

We asked moms to assume their kids will be allowed to return to school campuses in the fall for in-person classes. If this is the case, **88% of respondents reported that at least one of their children will attend school OUTSIDE THE HOME for the 2020-21 school year.**

\*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

The Field Agent on-demand platform offers the tools to help brands, retailers, and other companies win during BTS season and beyond. From retail-auditing to digital product demos, shopper insights to mystery shops, we have a full suite of products to make the grade with BTS shoppers.

## Everything you need for BTS success

- ✓ Audits
- ✓ Digital Demos
- ✓ Ratings & Reviews
- ✓ Insights
- ✓ Mystery Shops

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