



BACK-TO-SCHOOL | 20

*Insights Into the Spending, Shopping,
& Attitudes of American Families*

16

A LETTER FROM RICK WEST, *CEO & Co-Founder, Field Agent*



Back-to-school generated roughly \$25 billion in consumer spending last year. Make that \$68 billion if you include back-to-college (source: National Retail Federation).

Brands and retailers have the BTS shopping season circled in red on their calendars. It's a make-or-break moment for many companies.

And like so many walks of life, success during BTS is a function of at least two things: preparation and execution.

For any key retail event or initiative, top-performing brands do their homework—persistently, doggedly. Among other things, they prepare by ensuring retail plans are rooted in an accurate and adequate understanding of shoppers and in-store conditions.

Of course, plans are only as good as their execution and, for that reason, top brands also make sure in-store realities—prices, on-shelf availability, displays, signage—consistently align with their plans and expectations. They follow-through.

This report, “Back-to-School 2016: Insights Into the Spending, Shopping, and Attitudes of American Families,” was designed to help companies prepare and execute BTS strategies.

To help you *prepare*, we surveyed over 500 moms of K-12 students about their families' BTS shopping attitudes and behaviors—gleaning, as you will see, some pivotal insights.

And to help you *execute* your retail plans, this report demonstrates methods for monitoring your in-store BTS execution.

Ultimately, my hope is that this resource helps you make the grade with BTS shoppers in 2016.

Do I hear the bell ringing?

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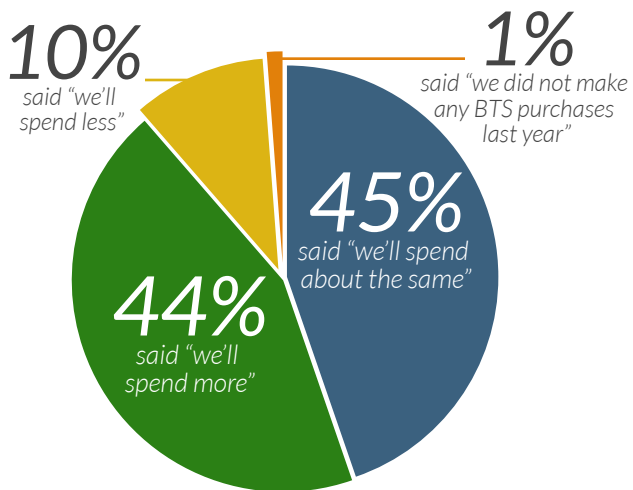
The background of the image is a soft-focus collection of school supplies. In the foreground, several crayons are visible, including a prominent orange one with black bands and a yellow one. Below them, there are white markers with black and yellow accents. The overall scene is brightly lit, creating a clean and organized aesthetic. The text is centered over this background.

BACK-TO-SCHOOL SPENDING

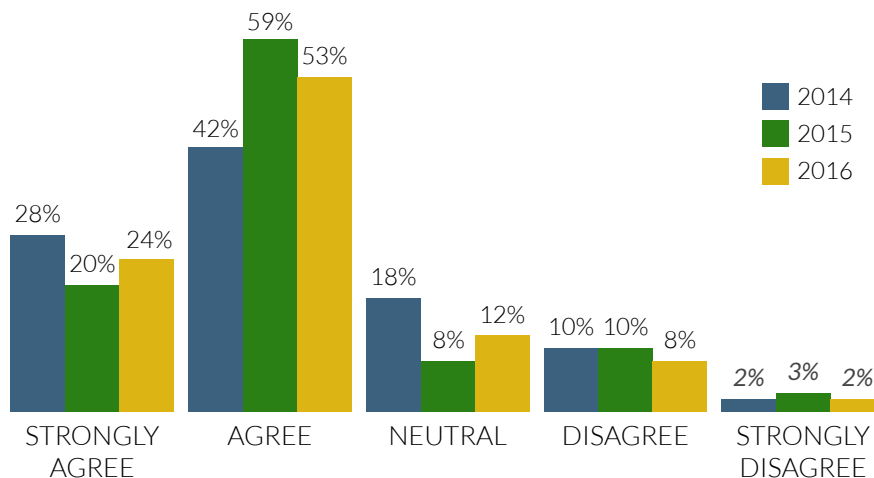
READING, WRITING, AND HOME FINANCE | Consumer spending for BTS 2016

Our survey of 500 households suggests most families are anticipating spending more (44%) or about the same (45%) on back-to-school in 2016. Only 10% will spend less. This year's findings don't depart greatly from last year, when 48% said they'd spend about the same compared to the previous year, 38% said they'd spend more, and only 12% said they'd spend less. For the last three years, the majority of moms surveyed agreed BTS is a strain on their personal budgets.

Will your household likely spend more, less, or about the same on back-to-school shopping for the 2016-17 school year when compared to the year now ending?



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



STOCKING UP FOR BACK-TO-SCHOOL | General BTS Merchandise Purchases

Predictably, clothes (96%), basic school supplies (95%), and footwear (93%) top the list of general BTS merchandise purchases. However, half (or more) of all households surveyed said they're planning on making purchases in all nine categories presented, suggesting BTS has important implications for brands across many industries. Some categories—athletic equipment, electronics—are more vulnerable to the influence of age (i.e., grade-level) than others.

Which of the following are you likely to purchase for the upcoming school year? Choose all that apply.

	K-2nd <i>n</i> =235	3rd-5th <i>n</i> =192	6th-8th <i>n</i> =159	9th-12th <i>n</i> =187	Combined <i>n</i> =501
CLOTHES	94%	97%	98%	98%	96%
BASIC SCHOOL SUPPLIES	97%	96%	96%	92%	95%
FOOTWEAR	91%	96%	95%	93%	93%
HYGIENE ITEMS	87%	91%	92%	85%	87%
BACKPACKS	80%	83%	89%	81%	81%
FOOD FOR PACKED LUNCHESES	83%	82%	79%	73%	80%
ATHLETIC EQUIPMENT/GEAR	48%	54%	70%	63%	54%
ELECTRONICS	41%	54%	69%	65%	52%
MEDICATIONS/VITAMINS	50%	45%	52%	48%	48%

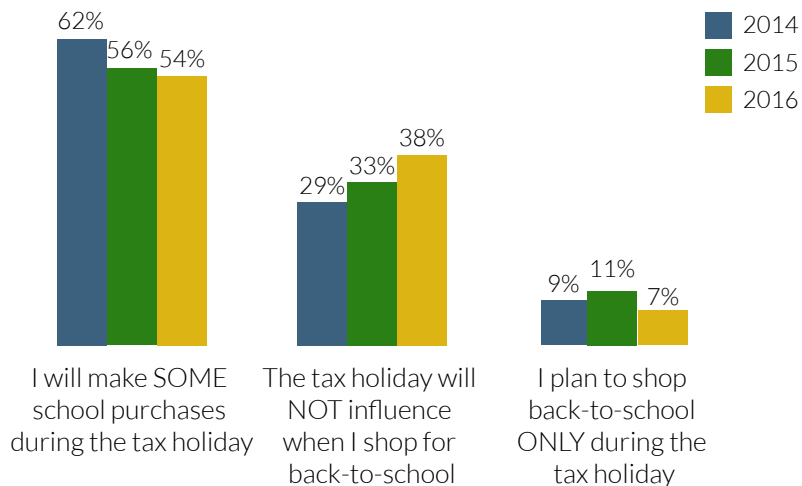
A group of diverse children in a classroom, smiling and cheering enthusiastically. The children are wearing school uniforms, and the scene is brightly lit, suggesting a positive and energetic atmosphere.

INFLUENCES ON BACK-TO-SCHOOL

GETTING WHILE THE GETTING IS GOOD | Influence of Sales Tax Holidays on BTS Spending

For the last three years, the majority of moms in our survey said they expected to make some—but not all—back-to-school purchases during their state’s sales tax holiday. These numbers represent only those respondents (n = 356) who live in states with sales tax holidays and are aware of it.

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



MOBILE AUDITS – EXECUTE BTS LIKE A PRO

Plans are only as good as their execution. Before and during the BTS rush, many companies utilize Mobile Audits to monitor in-store operations. Mobile Audits combine crowdsourcing and smartphone technology to answer questions like:

- Are displays, signage, and other point-of-purchase materials being properly executed at retail?
- Are shelves and displays adequately stocked with our merchandise?
- Are shoppers seeing the correct prices on our goods?

Photos from an Actual Mobile Audit:



PRICE CHECK



OUT OF STOCK



PLANOGRAM



DISPLAY

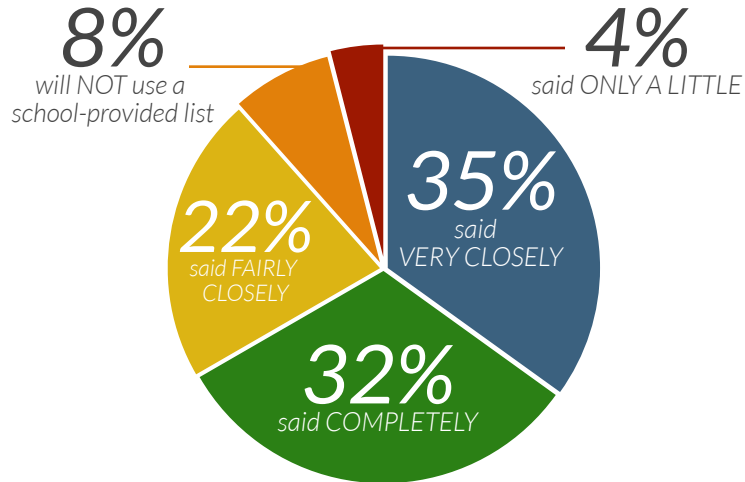
See how they work:

[DOWNLOAD THE MOBILE AUDIT INFOGRAPHIC](#)

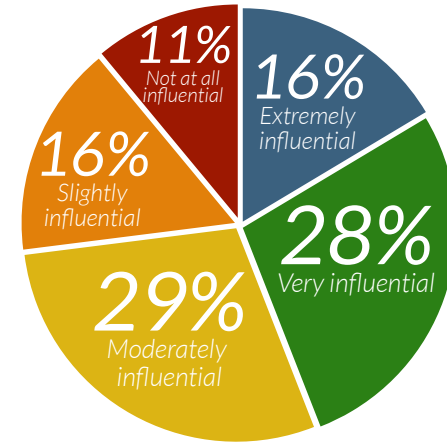
MAKE THE LIST, MAKE A SALE | Influence of School-Provided List on BTS Purchases

Most households, the results suggest, follow a school-furnished list either “completely” (32%) or “very closely” (35%) when shopping for BTS school supplies. In all, 92% will follow their school’s list at least a little, compared to 86% in 2015. Specific brand name mentions have some influence over shoppers’ choices, with 44% calling them “extremely” or “very” influential.

How closely do you plan to follow a **SCHOOL-PROVIDED SHOPPING LIST** in buying school supplies for the 2016-17 school year?

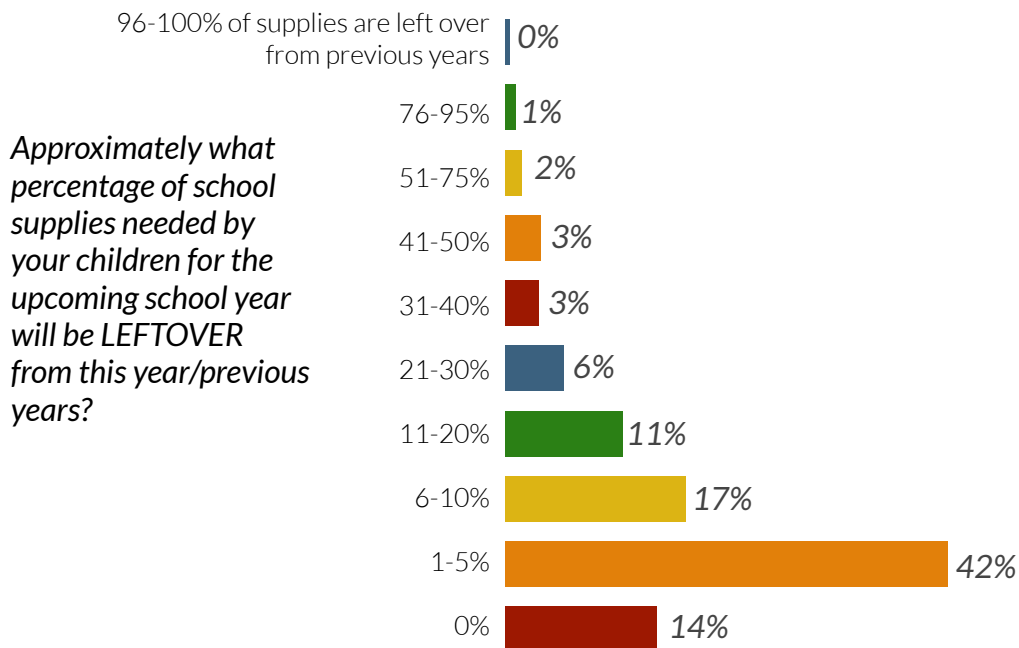


If the school-provided supply list suggested **SPECIFIC BRAND NAMES**, how influential would those suggestions be to your school supply purchases?



WHO WANTS LEFTOVERS? | Role of Leftover School Supplies on BTS Spending

For this question, we specifically asked mothers to estimate the amount of school supplies left over from previous years that they will not buy for the 2016 BTS shopping season. Clearly, many households—more than half answered 0-5%—are running low after a long year, or they just like to start from scratch in the fall.



INSIGHTFUL PHOTOS: LEFTOVER SUPPLIES

Mobile Research goes directly into stores, homes, or even school/office supply containers to capture in-the-moment images, information, and insights.

As the images depict, we asked moms to take pictures of leftover school supplies inside their homes:

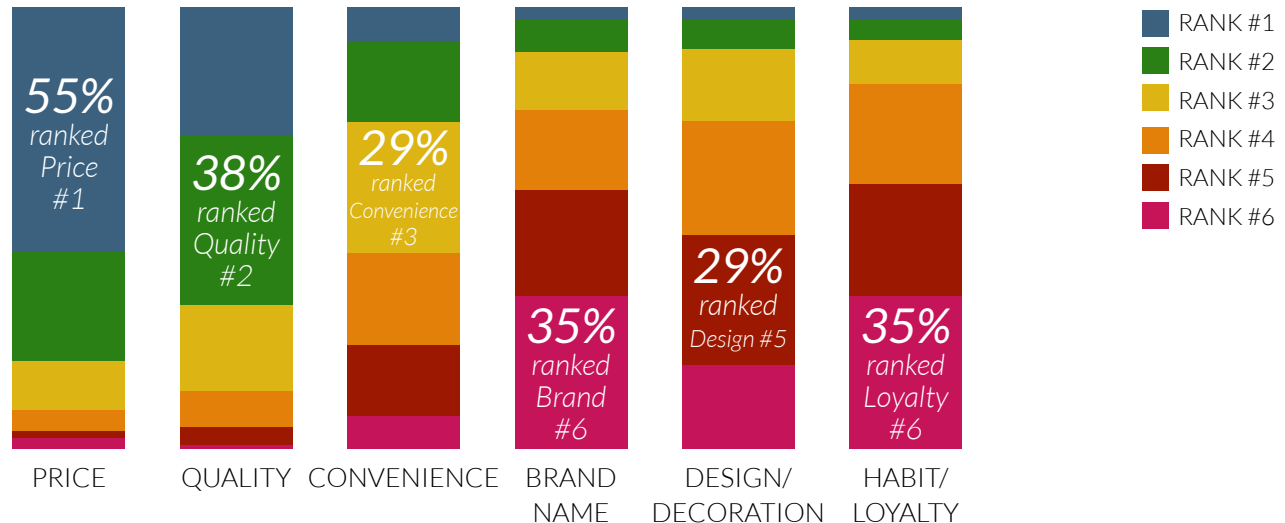


Download [“How it Works: Mobile Research”](#) to learn how mobile research captures rich, in-the-moment insights

HOW BRANDS CAN MAKE THE GRADE | Top Shopping Priorities among BTS Moms

What really matters when shopping inside stores for BTS supplies? For the second year in a row, price and quality dominated all other priorities. This year, 80% made price a #1 or #2 priority (2015: 86%) while quality was #1 or #2 for 68% (2015: 72%). And, yet, factors such as in-store convenience are also important influences on shopper decisions.

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

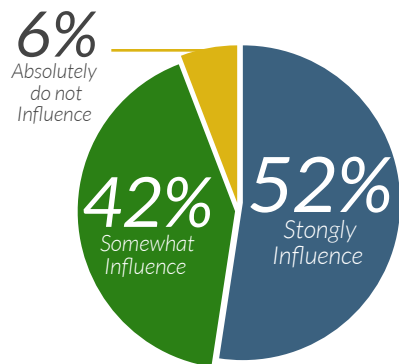


KIDS CALL THE SHOTS | Influence of Children on BTS Purchases

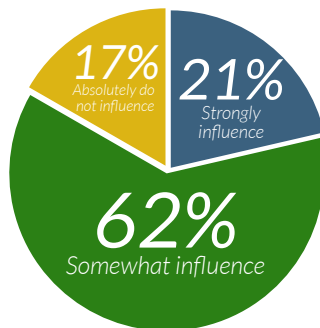
But MOM! You can hear the kids' cries already. To what extent do the users of BTS purchases, the kids, influence the purchasers, moms and dads? Kids wield considerable influence, moms told us, over clothing/footwear and even the contents of packed lunches. Their influence over attire purchases, as you can see, becomes even more pronounced as they get older, while their influence over supplies and foods remains largely stable.

Percentage of Children Who Strongly Influence Purchases				
	K-2nd	3rd-5th	6th-8th	9th-12th
Clothing and footwear	38%	50%	62%	71%
School supplies	14%	22%	22%	27%
Groceries for packed lunches	46%	45%	44%	45%

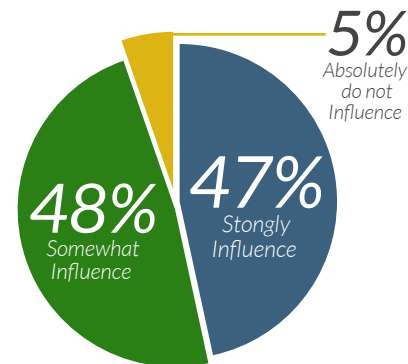
To what degree do your children influence your back-to-school buying decisions in the following categories?



CLOTHING & FOOTWEAR



SCHOOL SUPPLIES



GROCERIES FOR PACKED LUNCHES

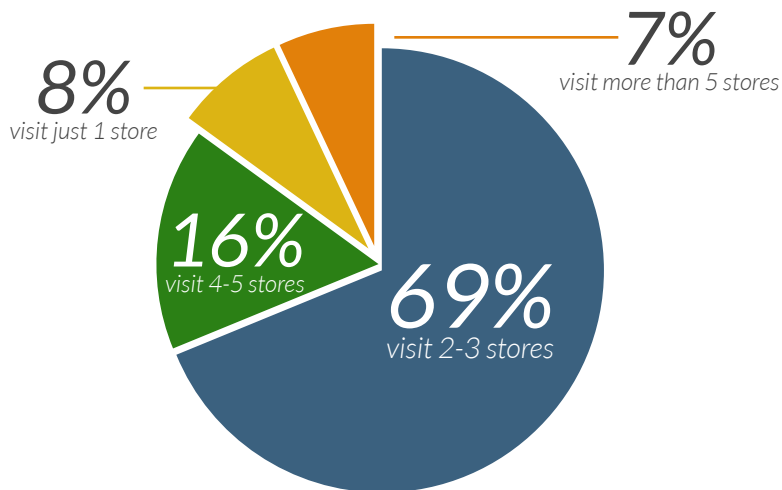


**BACK-TO-SCHOOL
SHOPPING
DESTINATIONS**

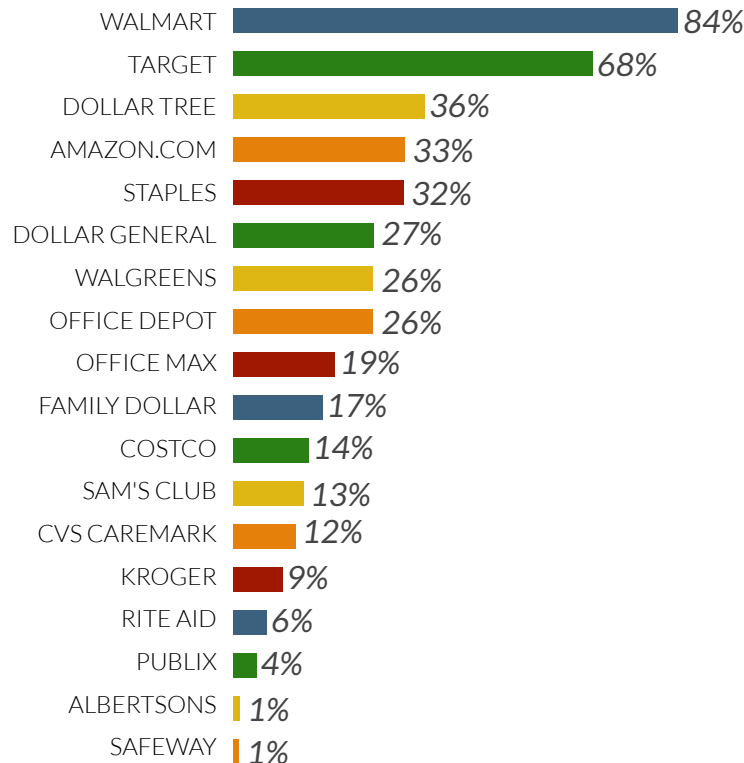
END DESTINATIONS | Preferred Retailers for BTS Supplies

At 84%, Walmart sits high atop the retail mountain for selling school supplies. On the question of who sells the most back-to-school clothing, however, there's a reversal at the top (read on). Of course, BTS is a big pie and many retailers enjoy a slice. Almost 7 out of 10 moms told us they visit 2-3 stores to purchase school supplies.

How many stores will you probably visit to purchase your SCHOOL SUPPLIES for Back-to-School 2016-17?



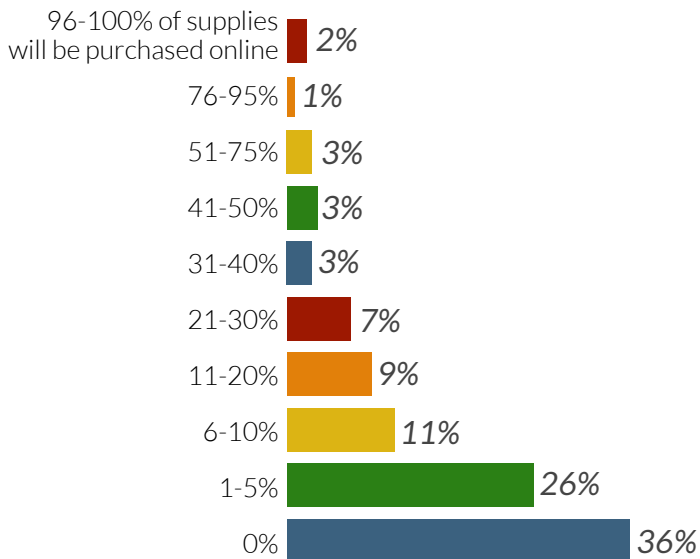
Identify all the retailers from which you'll purchase SCHOOL SUPPLIES for Back-to-School 2016-17. Choose all that apply.



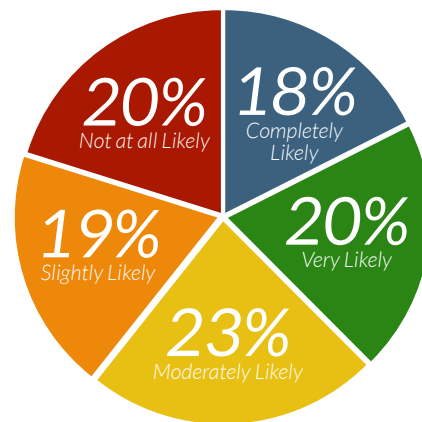
BIG BUCKS ON THE LINE FOR ONLINE RETAILERS | Role of Online BTS Shopping

Households shop online for BTS supplies; they just don't shop online a great deal. Fully 64% say they are likely to purchase some school supplies off the Internet. Yet only 38% will purchase more than 5% of their basic school supplies online, and only a meager 6% will purchase more than half. As for the threads, 38% surveyed say they are "completely" or "very" likely to purchase BTS clothing and footwear online.

Approximately what percentage of school supplies do you estimate your household will purchase **ONLINE** for Back-to-School 2016-17?



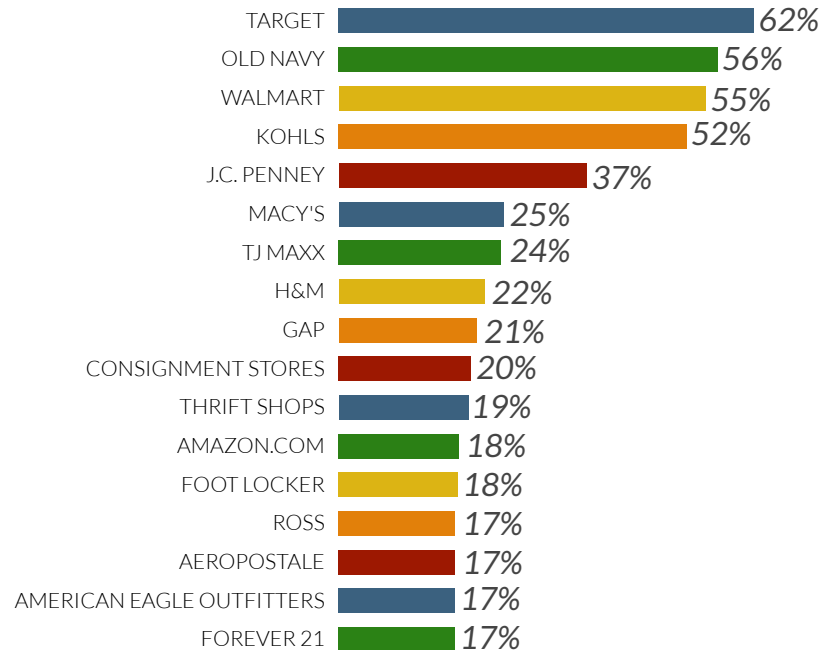
What is the **LIKELIHOOD** you will purchase clothing/footwear **ONLINE** for Back-to-School 2016-17?



DRESSING FOR SUCCESS | Top Retailers for Buying BTS Clothes, Footwear

Walmart was the top destination for school supplies in our survey, but Target rose to top spot on the question of back-to-school clothing. In all, 62% of moms said they're likely to visit Target to shop for back-to-school clothes. For mass merchandisers, department stores, and specialty stores catering to kids of practically all ages (e.g., Old Navy), grade level naturally exerted less influence on the results than for age-defined specialty chains like American Eagle. 32% of 9th-12th Grade families will shop at American Eagle for BTS clothes, compared to only 8% of K-2nd Grade families.

Select all the retailers you will likely purchase CLOTHING from for Back-to-School 2016-17. Choose all that apply



RUE 21 11%, ABERCOMBIE & FITCH 10%, COSTCO 9%, DILLARDS 9%, POLO RALPH LAUREN 7%, SAM'S CLUB 6%, PACSUN 5%, LANDS' END 5%, CHILDREN'S PLACE 5%, NORDSTROM 5%, EXPRESS 4%, J. CREW 3%, AMERICAN APPAREL 3%, THE WET SEAL 3%, URBAN OUTFITTERS 3%, BANANA REPUBLIC 2%, EDDIE BAUER 1%, NY&C 1%, CHICO'S 1%

BRIDGE THE GAP | Between Headquarters & Stores

Mobile Audits effectively reduce the distance between brand headquarters and stores across the country. They ensure products and point-of-purchase marketing are never out of sight, and they do so:

- **Affordably:** Crowdsourcing and smartphone technology are super efficient, meaning companies can have eyes and ears anywhere...for less.
- **Quickly:** Mobile Audits often produce results in hours or days, not weeks or months. They help companies spot problems quickly.
- **Easily:** Companies can commission Mobile Audits with very little effort...and then watch as real-time results stream onto a live dashboard
- **Broadly:** With 700,000 auditors across the country, companies can have eyes and ears in practically any store, anywhere.

Witness the Behind-the-Scenes Capabilities of Mobile Audits:

[DOWNLOAD "HOW IT WORKS: MOBILE AUDITS"](#)



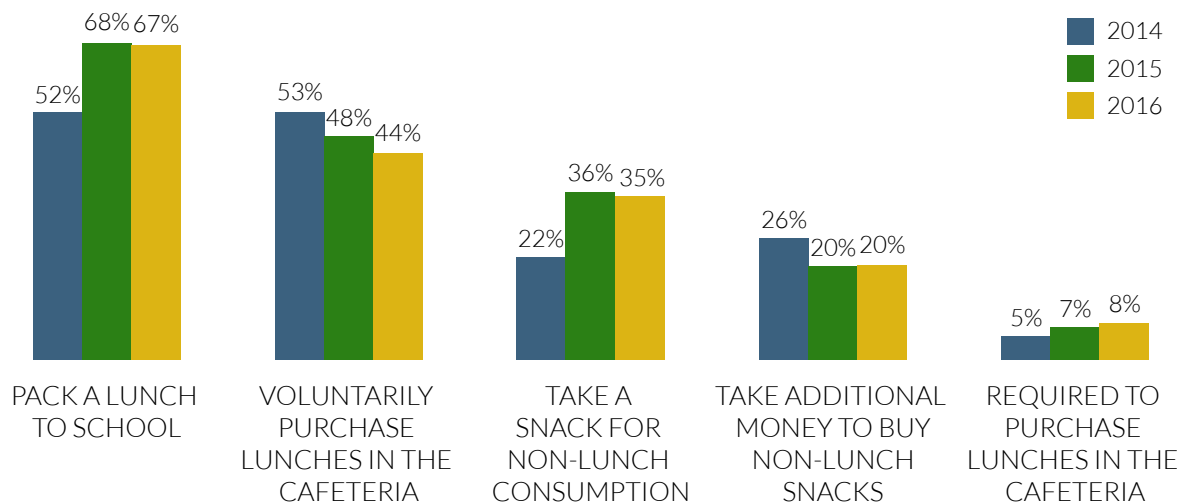
A bowl of fresh fruit, including strawberries, blueberries, and kiwi slices, is shown in a soft-focus background. The text is overlaid on the center of the image.

FEEDING BACK-TO-SCHOOL

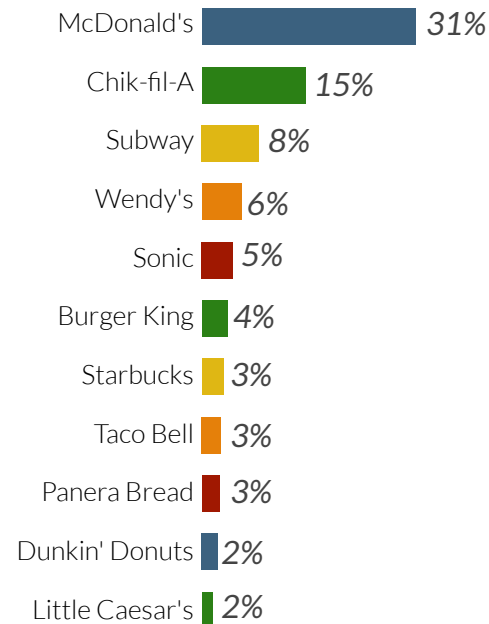
BAG OR TRAY? | Student Meal Plans

As in 2015, the majority of moms in our 2016 survey (67%) said their kids will pack a lunch when attending school in the fall, compared to 52% who will either voluntarily or involuntarily purchase meals in the school cafeteria. And for those quick before- and after-school meals, moms in our survey said McDonald's (31%) and Chick-fil-A (15%) best serve their families' needs.

Of these statements, which describe the meal/snack plan for your children this upcoming year? Choose all that apply to at least ONE of your children.



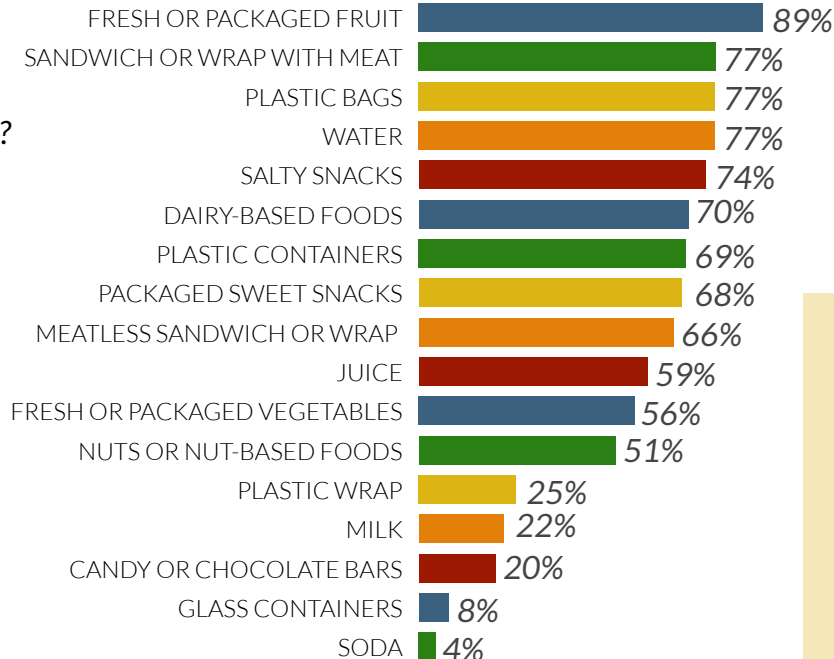
When you need a quick before-school and/or after-school meal or snack for your kids, which ONE fast food restaurant BEST serves your needs?



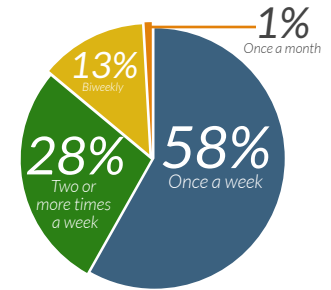
INSIDE THAT BROWN BAG | Content of Packed Lunches

Here's an important question for food and beverage companies: What's in that brown bag (aka packed lunch)? We asked only those respondents whose kids pack lunches (n = 338). For more than half of mothers surveyed (58%), shopping for packed lunch contents is a weekly affair, while almost 3 out of 10 visit stores two or more times a week to supply their kids' packed lunches.

What will your children's packed lunches contain?



How often will you likely go to the store to purchase food for packed lunches?



INSIGHTFUL PHOTOS - KIDS' FOOD STASHES

As illustrated, moms were asked to take pictures of the food supplies inside their homes from which they feed their kids most often.

Mobile Research captures images and/or video where you need it, when you need it. Mobile Research takes you in stores, in homes and practically anywhere.

[Download the eBook, "Mobile Research: How Smartphones Connect Companies with Their Customers."](#)



MOMS SPEAK OUT ABOUT BACK-TO-SCHOOL



IN THEIR OWN WORDS | Top BTS Frustrations among Moms

Moms were given a podium to share their top frustrations about BTS shopping. We analyzed their free form responses, and their top 3 complaints mirror the top 3 complaints from last year: high prices, out-of-stocks, and crowded stores/aisles. [See the blog post: What Really Frustrates Back-to-School Shoppers? 500 Moms Speak Out](#)

This year, each of the three criticisms was voiced by approximately a quarter of women surveyed.

HIGH PRICES

"The most frustrating part is how much things cost. For example, the three ring hard binders are very expensive and I have three kids who will need between 4 and 6 EACH. It would be nice to buy them in bulk for a better price."

43, Middleburg, FL, mother of 6th-8th grader and 9th-12th grader

OUT-OF-STOCKS

"When stores do not carry sufficient quantities of sales items and they are sold out. I will travel far for a good sale. So it's very frustrating to make a trip only to find out it's not there."

43, Lawrenceville, GA, mother of 6th-8th grader and 9th-12th grader



CROWDS

"The most inconvenient part of back to school shopping is the crowds on tax free days, which [is] why I prefer not to go during that time."

39, Dothan, AL, mother of 6th-8th grader and 9th-12th grader

IN THEIR OWN WORDS | Top Suggestions Moms Offer Companies

This year, we asked moms to offer suggestions for companies—specifically, what would make shopping for BTS easier on them? Perhaps unsurprisingly, the top suggestions reflect the top frustrations. Moms ask companies to make their lives easier by: keeping merchandise in stock, better organizing merchandise/aisles, and offering more sales/better prices. Respondents are also asking for better coordination between stores and schools, particularly aligning merchandise on-hand with the supply lists of local schools.

Here, again, in their own words:

OFFER MORE SALES/ BETTER PRICES

"Run the sales through Labor Day to ensure everyone has started school with the right items at reduced prices"

26, Lake St. Louis, MO, mother of K-2nd grader

BETTER ORGANIZATION

"Have all merchandise located in one place and please have extra in stock! Offer coupons and discounts."

46, Jacksonville, FL, mother of K-2nd grader

BETTER COORDINATION BETWEEN STORES AND SCHOOLS

"Have or check with local school's required lists and make sure to have all the supplies stocked accordingly."

35, Garland, TX, mother of 6th-8th grader and 9th-12th grader

KEEP MERCHANDISE IN STOCK

"Have plenty of stock for [what] they have on sale that week. It's very frustrating to head to a store for something advertised, and then have it be out of stock."

21, Salt Lake City, UT, mother of K-2nd grader

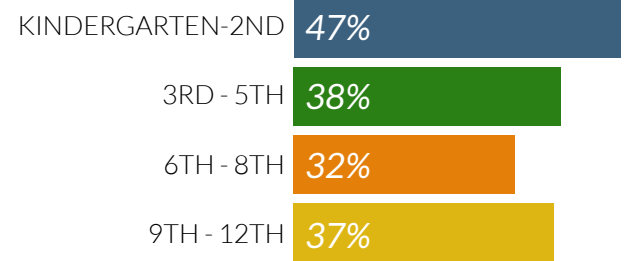
DEMOGRAPHICS

Field Agent surveyed 501 mothers of children Kindergarten-12th Grade, as of the start of the 2016-17 school year.

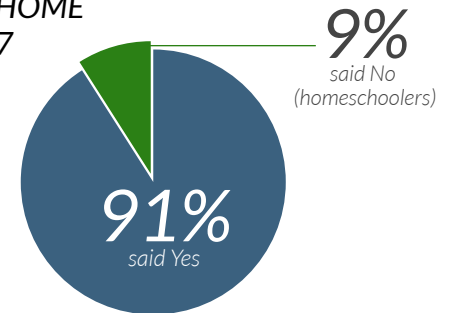


Respondents were located in 47 of the 50 states.

Identify the grades of all your children as they enter the 2016-17 school year.



Will at least one of your children attend school OUTSIDE THE HOME for the 2016-17 school year?





BONUS INSIGHTS
BACK-TO-COLLEGE

Powered by
FIELD AGENT[®]



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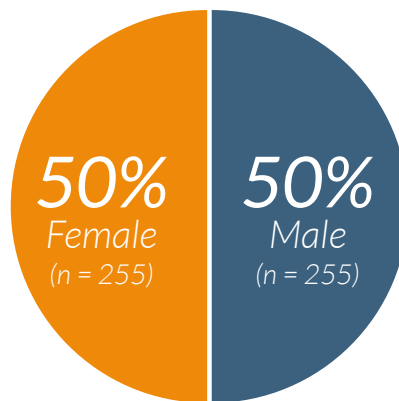
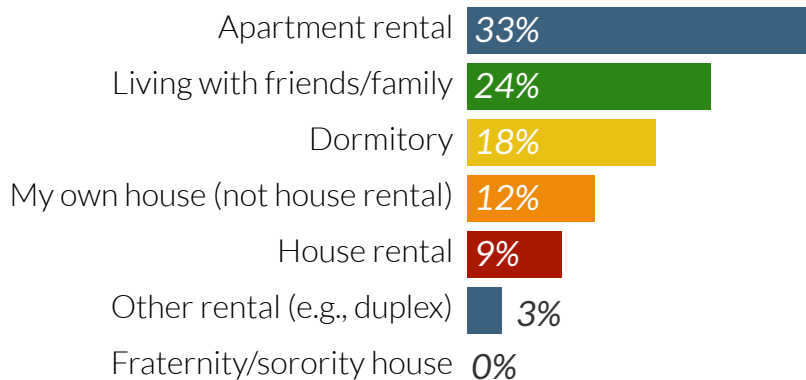


ABOUT THE SAMPLE | A Look at BTC Shoppers

Field Agent surveyed over 500 college students about their shopping plans and attitudes as they prepare to return to campuses this fall. We addressed a wide range of topics, from preferred retail destinations for BTC attire to favorite alcoholic beverages during the school year.

Over the next several pages we present the results from this timely study of BTC shoppers.

Where will you be living for the fall semester?

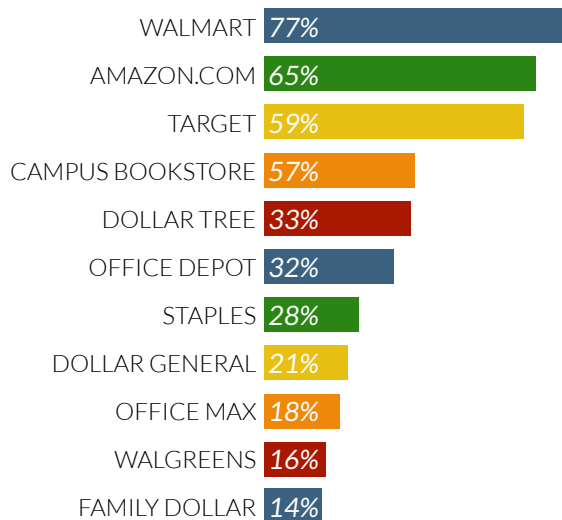


AGE RANGE: 18-24

RETAILERS OF CHOICE | BTC Shopping Destinations

One objective of our BTC survey was to understand the retailers college students visit to purchase school supplies, attire, and even alcoholic beverages. Walmart took top prize as retailer of choice for purchasing school supplies, while rival Target won the day for BTC clothing and footwear.

Identify all the retailers from which you'll likely purchase SCHOOL SUPPLIES to start fall classes.



COSTCO 11%, CVS CAREMARK 11%, SAM'S CLUB 10%, KROGER 9%, RITE AID 5%, PUBLIX 4%, SAFEWAY 3%, ALBERTSONS 2%

Select all the retailers you will likely purchase CLOTHING and/or FOOTWEAR from to begin the upcoming school year.

	Male	Female	Overall
TARGET	26%	57%	41%
AMAZON.COM	43%	33%	38%
H&M	24%	46%	35%
WALMART	29%	41%	35%
FOREVER 21	10%	59%	35%
KOHL'S	25%	40%	33%
OLD NAVY	24%	37%	31%
J.C. PENNEY	25%	33%	29%
TJ MAXX	16%	39%	28%
AMERICAN EAGLE OUTFITTERS	21%	33%	27%
MACY'S	22%	30%	26%
NIKE (OUTLET)	22%	24%	23%
CONSIGNMENT STORES (E.G., PLATO'S CLOSET)	11%	29%	20%
CHARLOTTE RUSSE	1%	39%	20%

OTHER POPULAR RETAILERS AMONG FEMALES:
THRIFT SHOPS 24%, MARSHALL'S 19%, ROSS 25%,
RUE 21 26%, PAYLESS SHOES 24%.

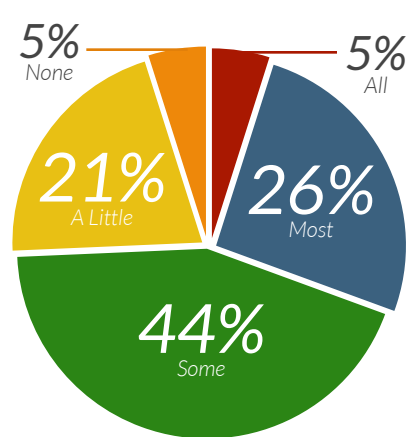
RETAILERS OF CHOICE | BTC Shopping Destinations

As the results suggest, campus bookstores aren't highly popular among college students, though campus restaurants and cafes fare somewhat better. Three of four college students will transact a least some of their BTC shopping online in 2016. Apparently, retailers offering student discounts may be rewarded with higher BTC sales, as 73% of survey respondents say such discounts are extremely or very influential to their purchases during the school year.

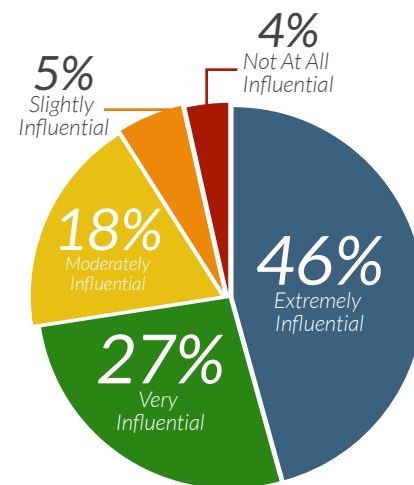
How often throughout a typical school year do you make (or plan to make) purchases/eat meals at the following places on YOUR OWN COLLEGE CAMPUS?

	Bookstore	Cafeteria	Restaurants/ Cafes	Vending Machines
Extremely often	3%	19%	12%	10%
Often	12%	22%	29%	16%
Sometimes	29%	20%	35%	26%
Rarely	34%	20%	17%	32%
Never	21%	19%	7%	15%

How much of your total BTC shopping (including school supplies, clothes, electronics, and decorations/supplies for your living space) do you expect to do ONLINE this year?



How influential are college student DISCOUNTS to your purchase decisions throughout the school year?



THE COLLEGIATE APPETITE | BTC Food & Beverages

Field Agent set out to understand the foods and non-alcoholic beverages college students keep stocked in their living spaces through the school year. Yet another indication of the growing health-consciousness of young Americans, bottled water (74%) and fresh fruit (71%) topped the list, while some traditional dorm room mainstays (like soda, 41%) lagged behind. Not surprisingly, some foods—bread and milk, for instance—fare much better among renters and home owners than dormitory residents.

Which of the following food and beverage items will you likely keep in your living space (e.g., dorm room, home) on a REGULAR BASIS through the school year?

	Apartment Renters (n=166)	Dorm Residents (n=92)	House Renters (n=46)	House Owners (n=62)	Overall (n=510)
BOTTLED WATER	74%	74%	70%	79%	74%
FRESH FRUIT	75%	63%	72%	68%	71%
MILK	74%	49%	78%	76%	69%
BREAKFAST CEREAL	75%	60%	67%	69%	69%
BREAD	73%	45%	72%	74%	67%
JUICE	66%	47%	59%	71%	61%
GRANOLA BARS	63%	62%	61%	60%	61%
PEANUT BUTTER	65%	52%	72%	56%	61%
CHEESE	65%	37%	78%	63%	58%
POTATO CHIPS	57%	52%	61%	56%	58%
FRESH VEGETABLES	61%	29%	65%	50%	52%
COFFEE	52%	46%	52%	48%	52%
FRESH MEAT	57%	21%	67%	60%	50%

OTHER POPULAR OVERALL FOOD/BEVERAGES:
 CHEWING GUM 49%, BREAKFAST BARS/PASTRIES 49%,
 PROTEIN BARS 48%, NUTS (OF ALL KINDS) 46%,
 FROZEN CHICKEN 46%, CRACKERS 45%, ICE CREAM 45%,
 CANDY 45%, CHEESY CHIPS/SNACKS 43%, SODA 42%

THE COLLEGIATE APPETITE | BTC Food & Beverages

We also looked into the fast food/fast casual preferences of college students, who identified McDonald's as their go-to place for a quick bite to eat. It's interesting to note how—in our survey at least—geography plays a role in the popularity of certain chains (e.g., Chick-fil-a, Taco Bell).

Which of the following fast food/fast casual restaurants will you AT LEAST OCCASIONALLY eat at during the upcoming school year?

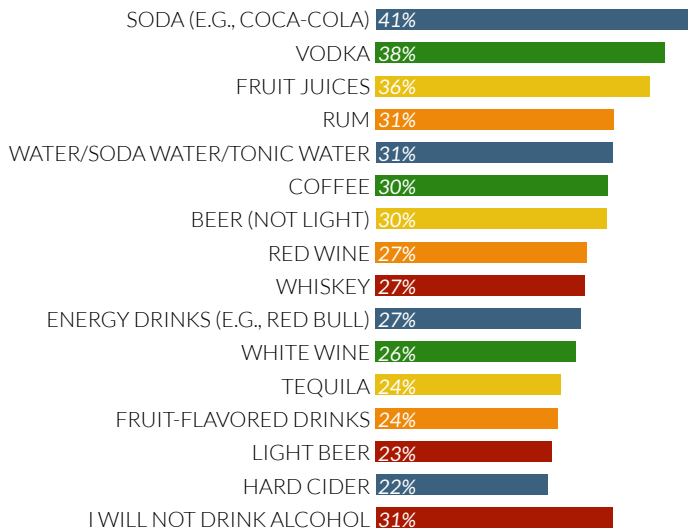
	West (n=90)	Northeast (n=88)	South (n=182)	Midwest (n=141)	Overall (n=510)
MCDONALD'S	56%	55%	58%	60%	58%
CHICK-FIL-A	32%	41%	76%	47%	54%
TACO BELL	49%	33%	52%	56%	49%
SUBWAY	51%	48%	51%	46%	49%
STARBUCKS	59%	47%	47%	44%	48%
CHIPOTLE	50%	52%	39%	48%	45%
BURGER KING	33%	50%	44%	44%	43%
DOMINO'S	37%	45%	42%	37%	40%
WENDY'S	33%	34%	42%	35%	37%
PANERA BREAD	24%	35%	32%	35%	32%
LITTLE CAESARS	32%	20%	36%	32%	31%
PANDA EXPRESS	43%	10%	31%	31%	30%
DUNKIN' DONUTS	14%	52%	26%	25%	28%
PIZZA HUT	32%	25%	27%	25%	27%
PAPA JOHN'S	12%	20%	35%	28%	27%
FIVE GUYS	22%	28%	24%	25%	25%
KFC	20%	30%	22%	26%	24%

COLLEGE SPIRIT(S) | Alcoholic Beverages

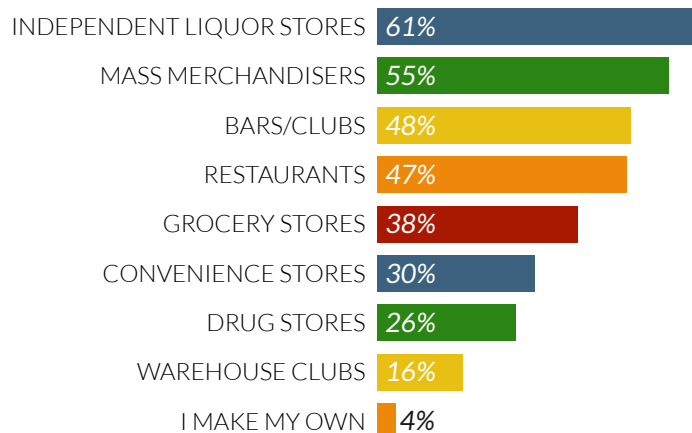
Field Agent explored college students' favorite alcoholic beverages—and beverages for mixing alcoholic beverages—during the school year. As results show, the most popular alcoholic beverage among college students isn't alcoholic at all: 41% said they mix soda with one or more alcoholic drinks.

At 38%, vodka was the most frequently identified alcoholic drink in our survey, followed by rum (31%) and beer (30%). And for buying alcohol, independent liquor stores (61%) received higher marks from college students than even mass merchandisers (55%) or restaurants/clubs (48%).

Which ALCOHOLIC beverages (or beverages for mixing alcoholic drinks) will you consume during the school year?



From which of these retailer types do you expect to purchase ALCOHOL for the upcoming school year?



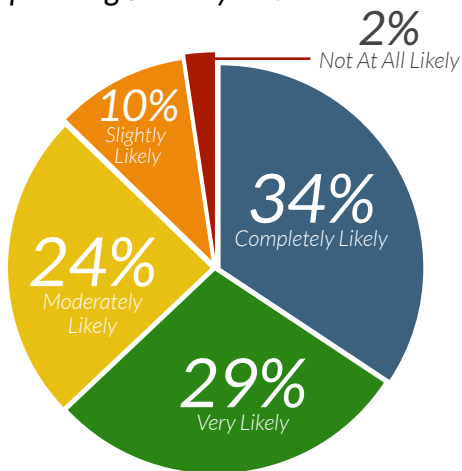
FASHION DESIGN 101 | BTC Attire & Hygiene

Inquiring minds want to know: What clothing, footwear, hygiene, etc. purchases will BTC shoppers make for the upcoming semester?

Oral and breath care products (69%) towered above all other product categories, while haircuts (56%), underwear (56%), backpacks (56%), and hair care products (55%) are also on many BTC shopping lists.”

It’s interesting to note differences between men and women, with the latter being more likely to make purchases in almost all categories.

How likely are you to purchase CLOTHES to begin the upcoming school year?



Of the following attire and appearance products/services, which will you likely purchase to start fall classes this year? (Showing top 12.)

	Male (n=255)	Female (n=255)	Overall
ORAL/BREATH CARE PRODUCTS	59%	78%	69%
HAIRCUT/HAIR-STYLING SERVICES	51%	61%	56%
UNDERWEAR	45%	67%	56%
BACKPACK	58%	54%	56%
HAIRCARE PRODUCTS	38%	72%	55%
SOCKS	50%	58%	54%
DRESS/CASUAL SHOES	39%	67%	53%
SHAVING EQUIPMENT	38%	64%	51%
BLUE JEANS	40%	62%	51%
SKINCARE PRODUCTS	31%	69%	50%
SHORTS	41%	49%	45%
TENNIS SHOES	38%	40%	39%

OTHER POPULAR OVERALL ATTIRE & HYGIENE:
 FLIP FLOPS/SANDALS 36%, JACKET/COAT 36%, BRAS 35%,
 SUNGLASSES 33%, DRESSES 31%, BELT 29%,
 PURSE OR PERSONAL BAG/TOTE 25%, MANICURE/
 PEDICURE SERVICES 25%, SKIRTS 23%, HEADWEAR 23%,
 WATCH 22%, JEWELRY 21%, TROUSERS/SLACKS 19%

POWER ON | BTC Electronics & Appliances

It should come as no shock: Many college students load up on electronics, appliances, batteries, and the like when preparing to return to campus.

Batteries are a very common purchase among BTC shoppers. In all, 65% of survey respondents—including 73% of dorm residents—said they'll buy AAs, AAAs, and other batteries when gearing up for the fall.

Not surprisingly, headphones/earphones (50%), chargers (46%), and cords/cables (35%) are also prominent purchases among many college students.

And as far as larger, more expensive purchases go: laptop PCs (24%) bested even smartphones (23%) in our survey.

What ELECTRONICS/APPLIANCES are you likely to purchase for the upcoming school year? Choose all that apply.

	Apartment renters	Dorm residents	House renters	House owners	Overall
BATTERIES	66%	73%	63%	58%	65%
HEADPHONES/EARPHONES	45%	47%	52%	42%	50%
CHARGERS (ELECTRIC)	45%	57%	46%	42%	46%
CORDS/CABLES	35%	41%	28%	29%	35%
PC - LAPTOP	22%	16%	17%	31%	24%
SMARTPHONE	25%	14%	22%	31%	23%
TV	25%	25%	15%	23%	23%
SPEAKERS - PORTABLE	20%	29%	24%	23%	23%
TABLET	20%	11%	11%	26%	20%
STREAMING DEVICE	19%	13%	20%	23%	18%
VACUUM CLEANER	25%	18%	26%	10%	18%
MICROWAVE	21%	18%	15%	16%	16%

HOME SWEET HOME | BTC Home Décor & Furnishings

Field Agent also asked college students a few questions about shopping for and purchasing bedding materials. We learned, for instance, that Amazon and Bed, Bath & Beyond are tops with college students for buying sheets, pillows, comforters, and so on. We also found that college students differ greatly in terms of how often they purchase bedding materials, and that, when it comes to comforters, style, color, warmth, and fabric are actually more important than price.

Where are you likely to purchase BEDDING products (e.g., sheets, comforters, pillows) for the upcoming school year?

	Apartment Renters (n=166)	Dorm Residents (n=92)	House Renters (n=46)	House Owners (n=62)	Overall (n=510)
AMAZON.COM	46%	50%	43%	45%	45.5%
BED, BATH AND BEYOND	45%	50%	41%	52%	45.1%
TARGET	41%	32%	48%	29%	35%
WALMART	40%	23%	35%	26%	33%
KOHL'S	17%	15%	15%	15%	16%
T.J. MAXX	20%	13%	9%	18%	15%
MACY'S	9%	12%	13%	15%	12%
J.C. PENNEY	12%	9%	13%	10%	11%
ROSS2	11%	8%	7%	13%	11%
BIG LOTS	11%	8%	7%	11%	10%
MARSHALLS	7%	7%	11%	18%	9%
COSTCO	7%	10%	13%	10%	8%
SAM'S CLUB	4%	4%	2%	6%	6%
EBAY.COM	6%	5%	4%	3%	5%
THRIFT STORE (E.G., GOODWILL)	4%	5%	4%	2%	5%

HOME SWEET HOME | BTC Home Décor & Furnishings

Primarily we wished to understand where college students go for guidance and inspiration in decorating their living spaces.

Among females especially, Pinterest is a highly popular source for such information. More than half in the survey (51%) said they use the social media platform for decoration ideas/suggestions, including 77% of women. Pinterest even exceeded the advice/living spaces of friends and other students in terms of influence over home décor decisions.

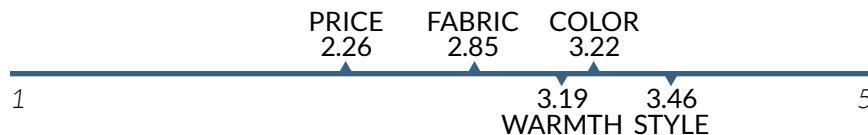
Which of the following will likely provide inspiration and/or guide you in DECORATING YOUR LIVING SPACE in the fall?

	Male	Female	Overall
PINTEREST	24%	77%	51%
FRIENDS' ADVICE	43%	42%	43%
INSTAGRAM	31%	48%	39%
FACEBOOK	28%	30%	29%
IN-STORE DISPLAYS	20%	29%	24%
WEBSITES	22%	25%	24%
TV SHOWS	22%	25%	23%
ETSY	10%	30%	20%
SMARTPHONE APPS	18%	17%	17%
TUMBLER	10%	23%	16%
BLOGS	13%	17%	15%
MAGAZINE	9%	19%	14%
TWITTER	14%	10%	12%
CATALOGS	8%	15%	12%

Which BEST describes how OFTEN you'll likely purchase the following items during the FULL COURSE of your college education?

	Comforter	Bed Sheets	Decorative Pillow
Somewhere in between "every new school year" and "once for the entire course of my college education"	39%	37%	33%
Once for the entire course of my college education	33%	20%	38%
With every new school year	22%	31%	22%
With every new semester	6%	13%	7%

Where 1 is most important and 5 least important, rank the following priorities by how important they are as you shop for and purchase a COMFORTER for your bed.



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