



Back to College in a Shifting Retail Environment

SHOPPING EVENT REVIEW





We asked parent and student shoppers about their back-to-college purchases.

Numerator's Back-to-College Report provides insight into consumer behavior and attitudes surrounding the 2023 back-to-college shopping season. Based on a survey of 915 parent & student shoppers fielded 8/7/23, the report outlines back-to-college shopping plans and highlights key differences in the back-to-college purchase behaviors of parent versus student shoppers and new versus returning students.

EXECUTIVE SUMMARY

Back to College (BTC) shoppers didn't cut back on spending but looked to save wherever possible.



There were key differences between students shopping for themselves and parents shopping for their students.

Parents tended to make decisions on purchases jointly with the student, while students shopping for themselves were solely responsible. Student shoppers also had smaller budgets—50% spent under \$50 **while almost 40% of parents spent over \$300.**



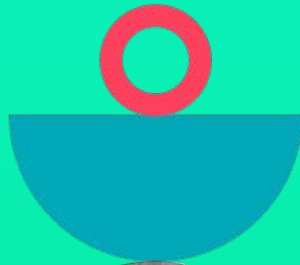
Shoppers spent similar amounts this year versus last but sought out deals.

Over half of households spent the same or more on back-to-college items this year. **Quality of promotions + competitive prices were the most important factors for retailer selection**, especially among parent shoppers. Student shoppers took advantage of Prime Day and Target Circle Week.



New students were more likely to shop early, but all groups continued to make BTC purchases in August.

Nearly one-third of shoppers started shopping during July deal weeks, and three-fourths of them were still completing BTC shopping in August. Although online was important, the majority of **back-to-college shopping took place in-store.**



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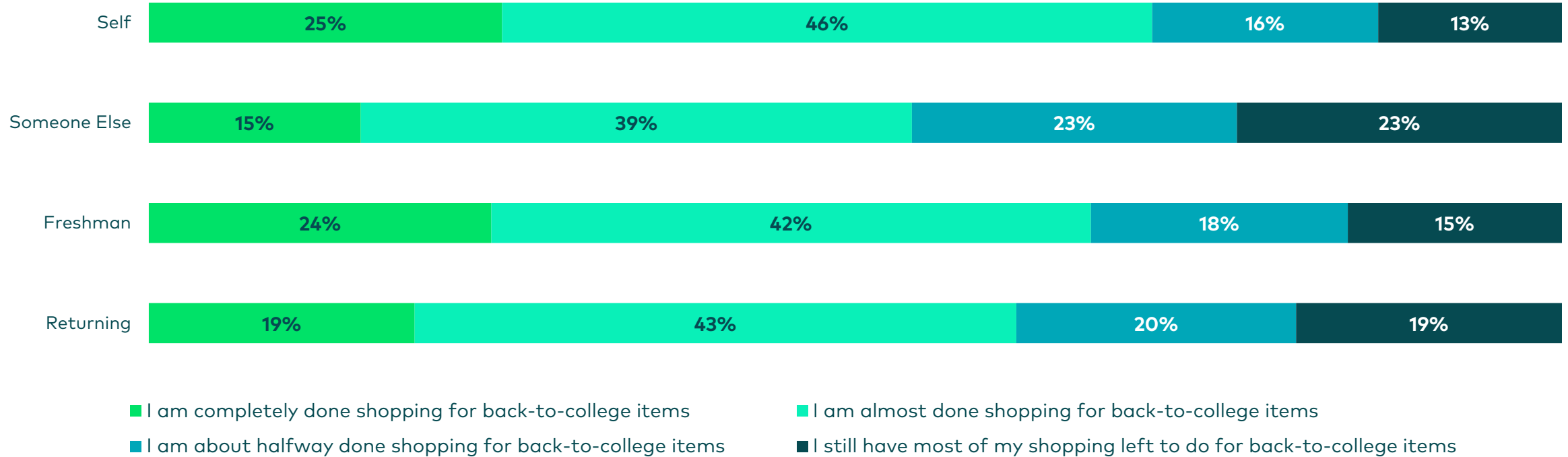
Timing of Back-to-College Shopping



Students tended to finish BTC shopping earlier than their parents.

LEVEL OF SHOPPING COMPLETENESS

% of back-to-college shoppers

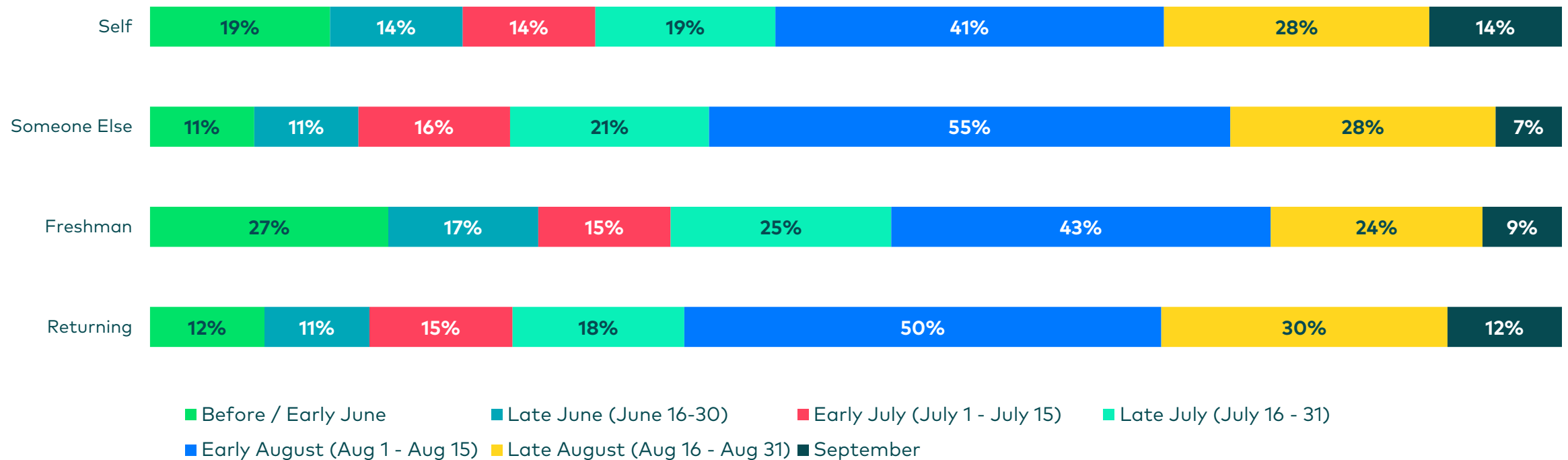


Source: Numerator Insights Back to College Survey August 2023 | "How would you describe your current situation as it relates to back-to-college items purchases?" | Self n=473, Someone Else n=442 | Freshman n=241, Returning n=674

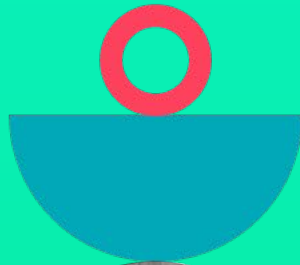
Freshmen were most likely to get a head-start on their back-to-college shopping, while early August was the most popular time overall.

PLANNED SHOPPING TIME

% of back-to-college shoppers



Source: Numerator Insights Back to College Survey August 2023 | "When did/do you plan to do your back-to-college shopping?" | Self n=473, Someone Else n=442 | Freshman n=241, Returning n=674



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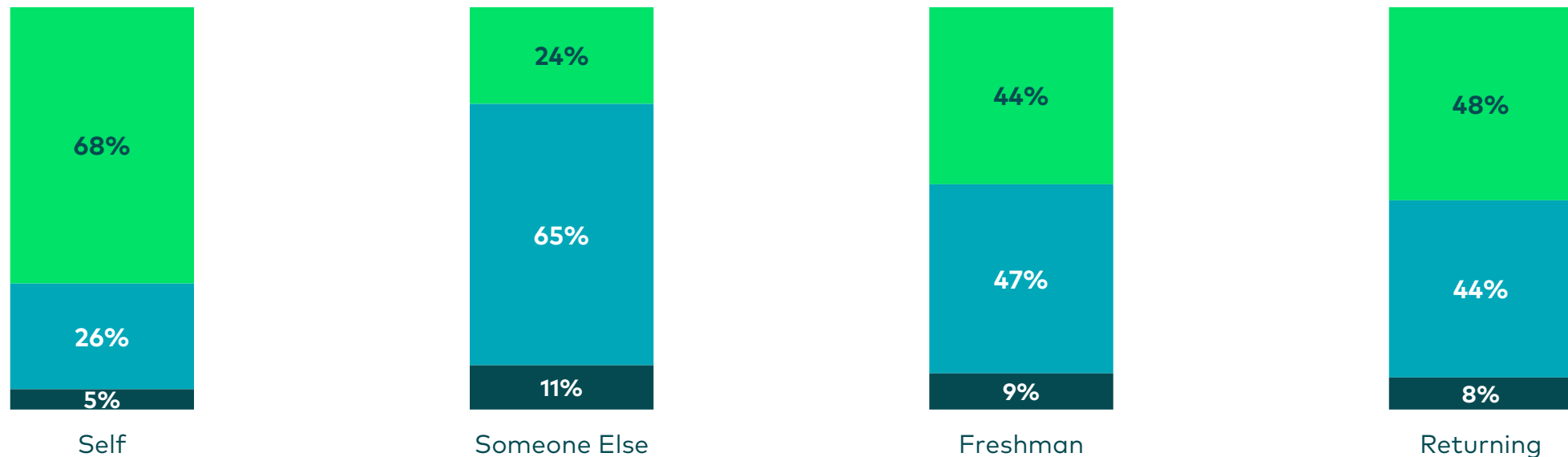
Back-to-College Purchase Preferences



Two-thirds of parents shared the decision-making with their students, while a quarter made the final purchase decision themselves.

LEVEL OF RESPONSIBILITY – PURCHASE DECISIONS

% of back-to-college shoppers

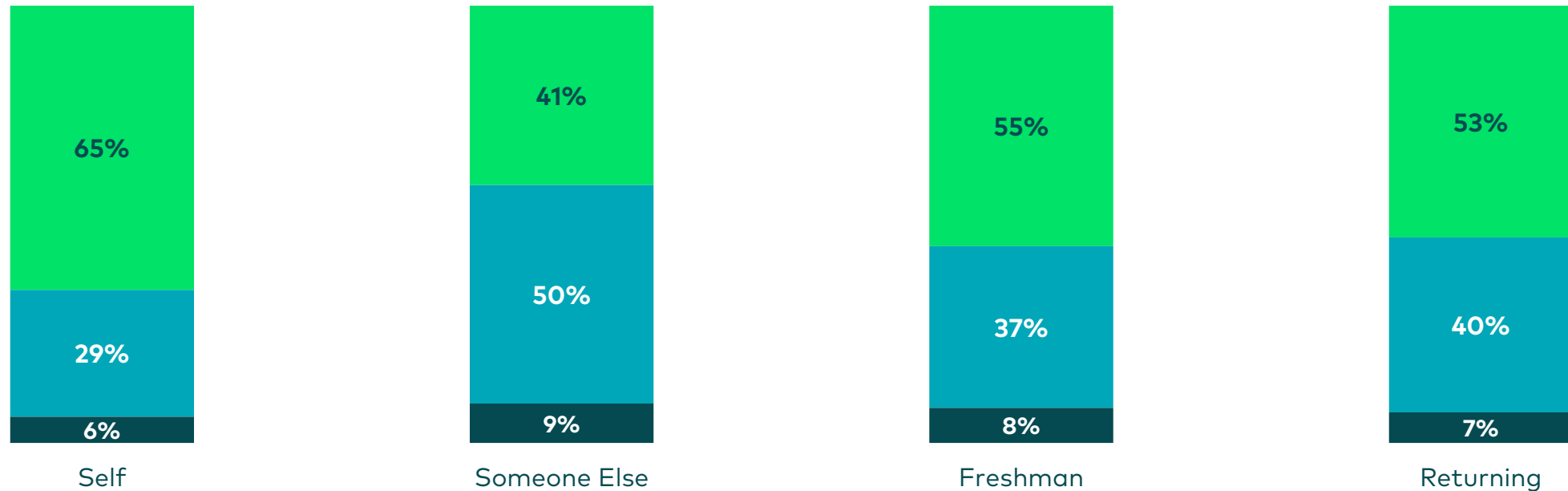


■ I am solely responsible for these decisions ■ I am making these decisions with someone else ■ I have little/no contribution when deciding what to purchase

Students shopping for their own back-to-college supplies were more likely to have sole payment responsibility.

LEVEL OF RESPONSIBILITY – PAYMENT

% of back-to-college shoppers

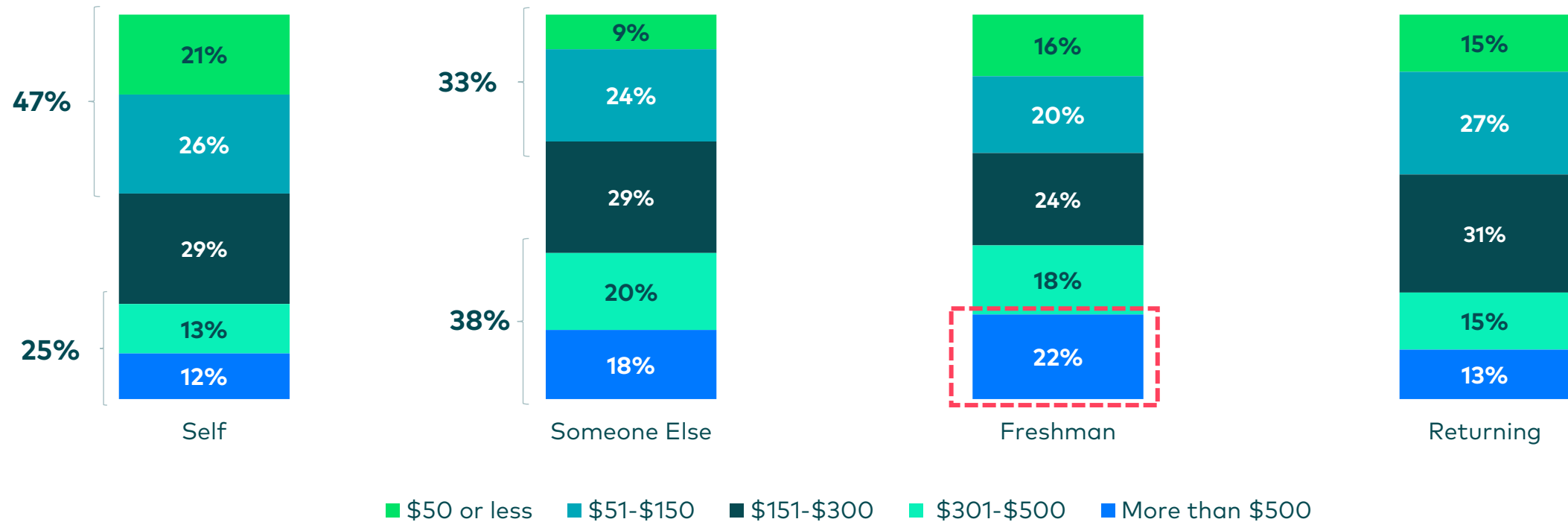


■ I am the only one making these purchases ■ I share responsibilities for purchase with someone else ■ I am only purchasing 1-2 items

Parents had larger back-to-college budgets, and Freshmen were the most likely to make heavy investments in BTC, with a fifth spending over \$500.

PLANNED SPEND FOR BTC ITEMS

% of back-to-college shoppers

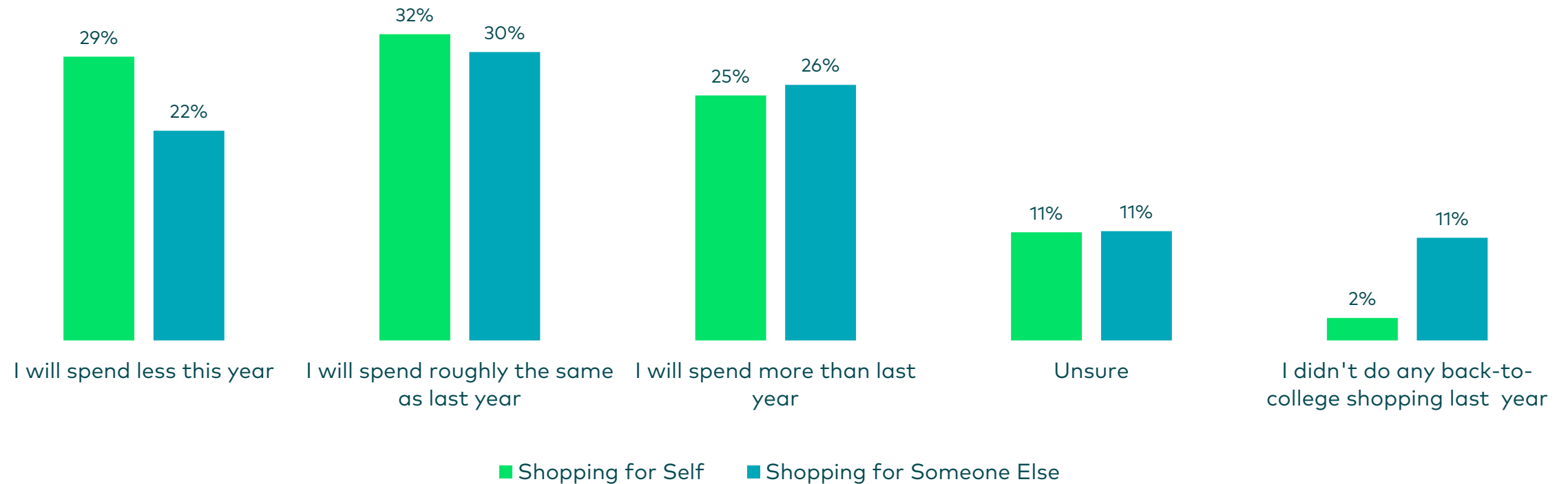


Source: Numerator Insights Back to College Survey August 2023 | "In total for this upcoming school year, approximately how much are you planning to spend/have you spent on back-to-college items?" | Self n=473, Someone Else n=442 | Freshman n=241, Returning n=674

Over half of households spent the same or more on BTC this year versus last.

SPEND VS LAST YEAR

% of back to college shoppers



Back-to-college shoppers were most enticed by "% off" offer types.

PREFERRED OFFER TYPES

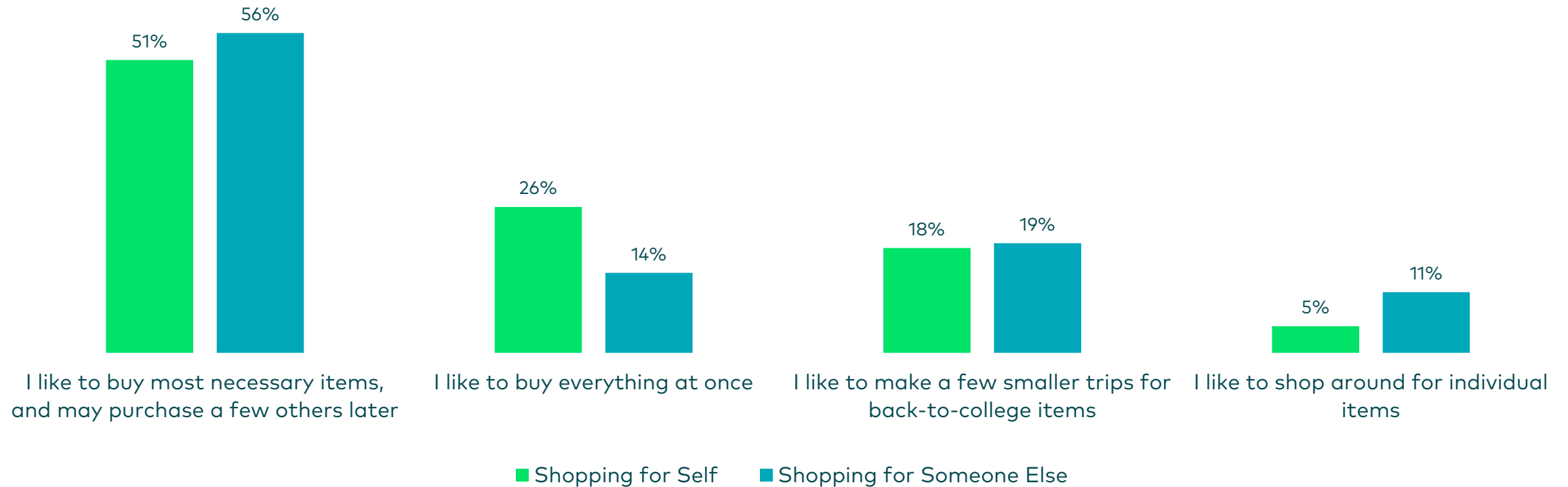
% of back-to-college shoppers



Students shopping for themselves were more likely to buy everything at once, while parents were willing to make multiple trips.

PURCHASING PREFERENCES

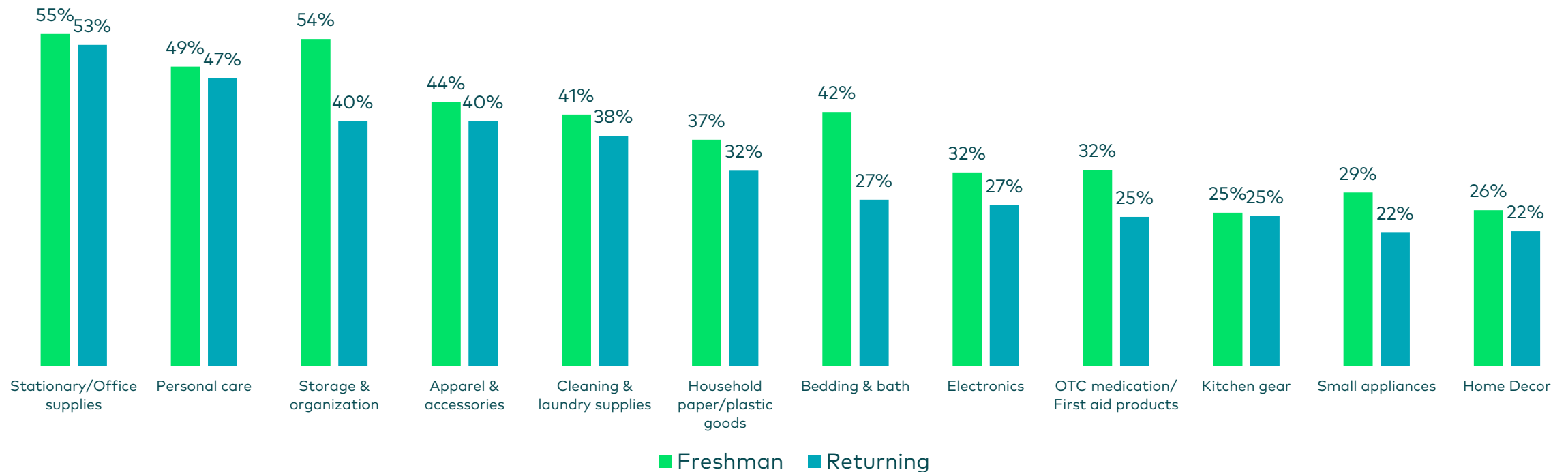
% of back-to-college shoppers



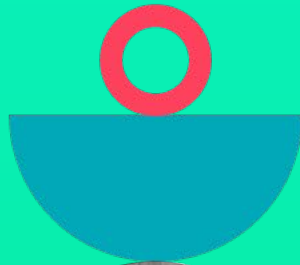
Freshmen were more likely to purchase a variety of supplies including storage, bedding, electronic items and OTC products.

PLANNED BACK-TO-COLLEGE PURCHASES

% of back-to-college shoppers



Source: Numerator Insights Back to College Survey August 2023 | "Which of the following types of items have you purchased/are you planning to purchase for back-to-college needs this year?" | Freshman n=241, Returning n=674



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Back-to-College Retailer Preferences



Price and selection were most important for those shopping on behalf of someone else, while self-shoppers were more concerned about selection and the quality of promotions and deals.

RETAILER SELECTION CRITERIA

% of back-to-college shoppers



Amazon was the top destination for BTC shoppers across groups— student shoppers also favored home improvement & home goods stores.

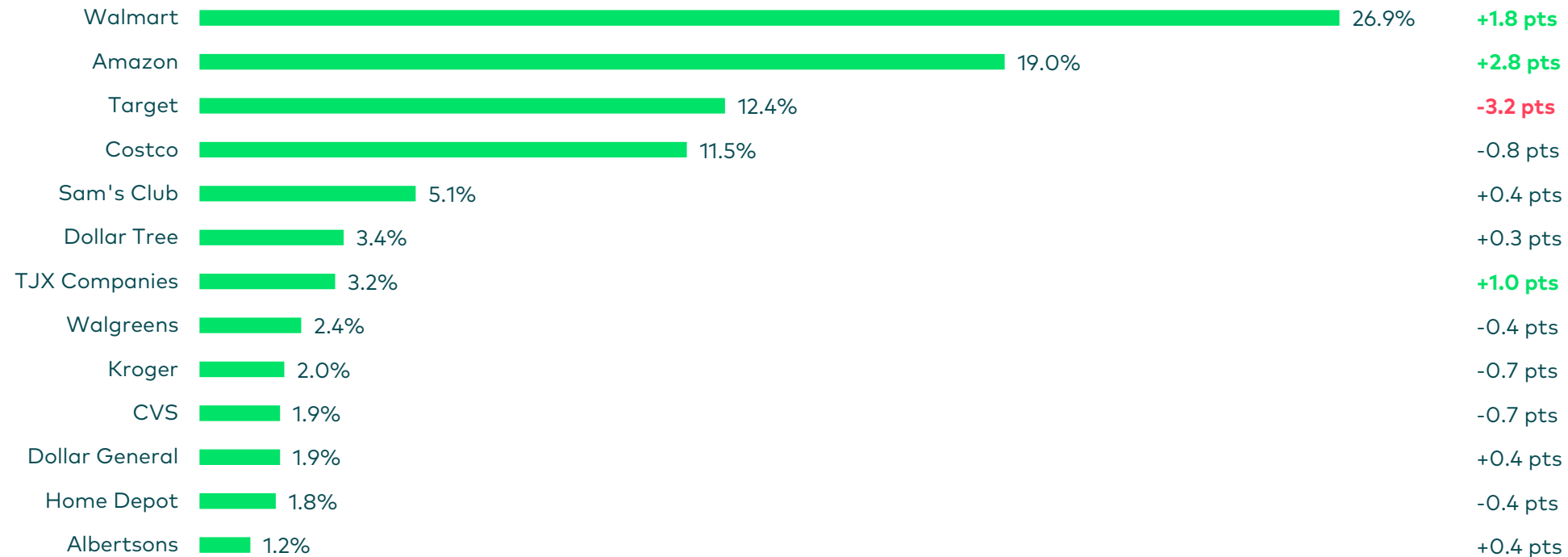
	SHOPPING FOR SELF	SHOPPING FOR SOMEONE ELSE	FRESHMAN	RETURNING
Amazon	70%	68%	75%	68%
Walmart	54%	67%	66%	58%
Target	49%	55%	52%	52%
Costco	27%	25%	23%	27%
Best Buy	24%	18%	22%	21%
Home Goods	19%	13%	15%	16%
Kohl's	13%	18%	18%	14%
Local grocery store	12%	9%	11%	11%
National grocery	10%	12%	8%	12%
Ikea	12%	11%	12%	11%
The Home Depot	12%	8%	7%	11%
Lowe's	8%	4%	5%	6%
Macy's	7%	5%	6%	6%

Index to total over 110 bolded in **green** | Index to total below 90 bolded in **red**

Amazon and Walmart have gained the largest share of back-to-college spending while Target has lost share in BTC categories.

RETAILER SHARE OF BACK-TO-COLLEGE SPEND

SHARE OF SPEND CHANGE TO LY



Students shopping for themselves took advantage of summer sale events, especially Amazon Prime Day and Target Circle Week.

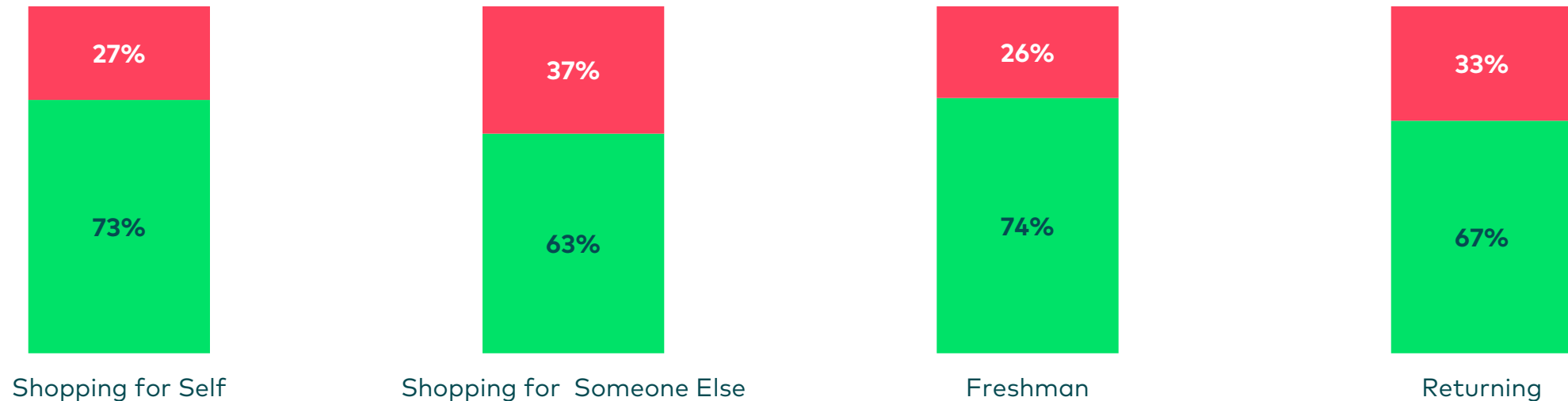
	SHOPPING FOR SELF	INDEX TO TOTAL	SHOPPING FOR SOMEONE ELSE	INDEX TO TOTAL	FRESHMAN	INDEX TO TOTAL	RETURNING	INDEX TO TOTAL
Amazon Prime Day	51%	114	38%	74	53%	139	42%	79
Target Circle Week	36%	114	27%	75	28%	104	33%	117
Walmart+ Week	25%	107	22%	87	23%	107	23%	101

Index to total over 110 bolded in **green** | Index to total below 90 bolded in **red**

Most households shopping Target Circle Week had already planned to start shopping at that time.

IMPACT OF TARGET CIRCLE WEEK ON SHOPPING TIMING

% of back-to-college shoppers



- No, I did not plan to start that early, but an item I needed was on sale
- Yes, I planned to shop for back-to-college around the time of the deal day

Shopping in-store was the most popular BTC shopping method, but at least half of all shopper groups purchased college items online, as well.

SHOPPING METHOD PREFERENCES

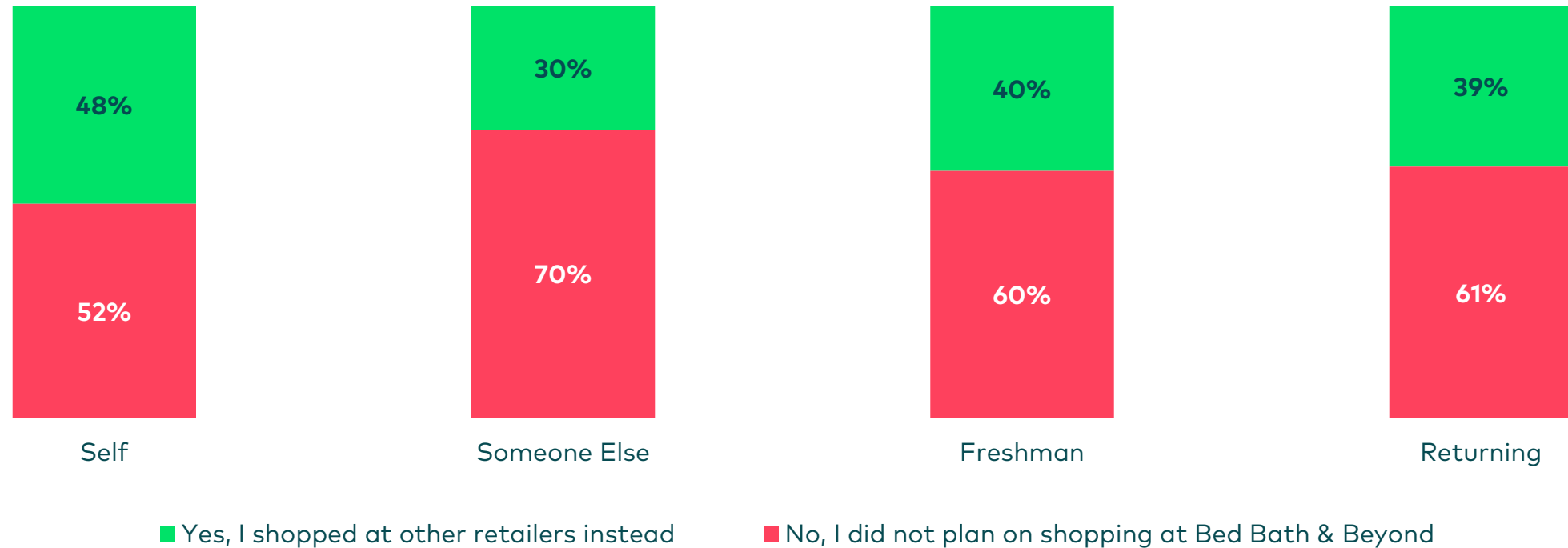
% of back-to-college shoppers



Almost half of students shopping for themselves had planned to shop at Bed Bath & Beyond and shopped elsewhere due to closures

IMPACT OF BED BATH & BEYOND CLOSURE

% of back-to-college shoppers





Let Numerator help with your back-to-college insights.

To dive deeper into the data outlined in this report, reach out to your Numerator representative or contact us at hello@numerator.com.

