The 2020 back-to-school year is proving to be anything but normal for both retailers and consumers alike. So, what’s in store for brands as shoppers look to head back to classrooms this fall and how will today’s current environment impact the second largest shopping season?

RetailMeNot and Kelton Global surveyed 1,000+ American shoppers and 200+ senior retail marketing leaders to gain key insights on back-to-school shopping expectations, investment shifts, timing and more.

For media inquiries:
PR@retailmenot.com
WHEN DO YOU PLAN TO START BACK-TO-SCHOOL SHOPPING?

$532
Average planned back-to-school spend in 2020 vs. $507 in 2019.

64% wait to make a purchase until they find a deal.

59% of parents say price is the biggest determining purchase factor.

52% of parents are also shopping for themselves while back-to-school shopping.

Parents are nearly twice as likely as last year to begin shopping for back-to-school items before July, though the majority prioritize late summer.

WHAT WILL CONSUMERS SPEND THE MOST ON?

Clothing
- 2020: $209
- 2019: $212
- 2018: $189

Electronics
- 2020: $192
- 2019: $209
- 2018: $186

Shoes
- 2020: $111
- 2019: $104
- 2018: $95

Backpacks
- 2020: $47
- 2019: $54
- 2018: $60

Americans are relying more on online and omnichannel options this back-to-school season.

56% say they will be more inclined to shop online this year because of pandemic concerns.

46% are most excited about shopping for clothes and accessories in physical stores again.

73% OF CONSUMERS SEARCH 2+ SOURCES

59% Retailer Sites and Apps
37% Social Media
35% Deal Sites and Apps
34% Browser Extensions
33% Newspaper Circulants
31% Cash Back Websites and Apps
Retailers make shifts to meet business and economic needs

When do retailers plan to start promotions?

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>May</td>
<td>10%</td>
</tr>
<tr>
<td>Jun</td>
<td>26%</td>
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<tr>
<td>Jul</td>
<td>34%</td>
</tr>
<tr>
<td>Aug</td>
<td>22%</td>
</tr>
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<td>Sep</td>
<td>5%</td>
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Retailers are 21% less likely to begin promotions in July in 2020, with more brands opting to push to August. Over 1 in 4 will make their biggest back-to-school sales push during the first weekend of August. Another 26% plan to pulse promotions evenly throughout the season.

Retailers are 16% less likely to say they are ready for the shopping season this year. Which may account for the later promotional period in 2020. 65% of brands will offer more promotions during back-to-school shopping in 2020.

80% of retailers agree Amazon remains top competition for back-to-school season.

70% worry that their organization will struggle to meet financial goals with Prime week being pushed outside of the Back-to-School season this year.
CONTACTLESS OPTIONS TAKE OFF AMIDST IN-STORE SHOPPING CONCERNS

Perhaps in response to the outbreak of Coronavirus, parents shopping back-to-school are opting for fewer in-store interactions than last year.

Parents who plan to use curbside pick up:

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>2019</td>
<td>36%</td>
</tr>
<tr>
<td>2020</td>
<td>52%</td>
</tr>
</tbody>
</table>

Retailers are 74% more likely to provide curbside pick-up in 2020, boosting contactless shopping practices.

40% of brands say they are offering more FREE SHIPPING options than ever before to compete with Amazon.

Retailers will also be more focused on PRICE MATCHING across channels with consumer preferences shifting to shopping online more often than going in-store.

NEARLY 1/2 of brands (47%) will offer price match guarantee across channels.

Retailers are 38% more likely to focus their promotional efforts on driving consumers in-store this season.

NEARLY 52% of consumers also agree that buy online, pick-up in-store is a convenient way to receive their back-to-school items.

METHODOLOGY

A 10-minute online survey was fielded between Monday, April 27, 2020 and Friday, May 1, 2020. During this time, 1,041 interviews were captured among American consumers. Key groups of interest were examined in this analysis, including those with and without children.

Additionally, a 15-minute online survey was fielded between Thursday, April 16, 2020 and Thursday, April 23, 2020 to key groups of interest, including Senior Managers/Directors+ and retailers who have/have not partnered with RetailMeNot in the past twelve months. During this time, 206 interviews were captured.

For more information, visit: insights.retailmenot.com