



Marketing to Moms Coalition

Back to School *2008 Highlights*

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Marketing to Moms Coalition Back to School 2008

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I. INTRODUCTION AND PURPOSE

The *Back to School 2008* Report was prepared by the Marketing to Moms Coalition.

The Marketing to Moms Coalition is an independent organization dedicated to supporting and promoting an understanding of mothers as the most powerful consumer group in the U.S.

A resource for industry professionals, the coalition is dedicated to providing insights, identifying trends and connecting members. The coalition will deliver on its mission by:

- Sharing Best Practices
- Disseminating proprietary research
- Awarding the HER seal to companies and brands that honor, empower and respect mothers
- Offering networking opportunities for like-minded marketing professionals
- Hosting events and symposia

The purpose of the *Back to School 2008* Report is:

1. To fulfill the mission of the Marketing to Moms Coalition
2. To provide actionable data and insights on how American Moms are approaching Back to School for retailers, manufacturers and other professionals who market to Moms
3. To establish a benchmark for ongoing tracking and as a point of comparison for other studies

Founding members of the Marketing to Moms Coalition (www.marketingtomomscoalition.org) include:

- Maria Bailey, CEO BSM Media
- Bridget Brennan, CEO Female Factor
- Michal Clements, Managing Partner, Insight to Action
- Teri Lucie Thompson, VP Marketing, Safeco Corporation



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II. METHODOLOGY

A nationally representative sample of American Moms completed the survey in the Third Quarter of 2008. This sample was balanced on region, household size, population density, income and ethnicity

An ending sample of 1,033 English-Speaking Moms with kids under 18 living at home completed the online questionnaire. All Moms were recruited online through mail panel provider, Market Tools

A Spanish-Speaking sample of 204 Moms also completed the study and can be analyzed as a distinct group.

In addition to the total sample, we also looked at Back to School Moms with a focus on elementary and middle school age children.

In order to qualify as a “School Age Mom”, the Moms needed to have at least one child ages 7 to 12 in the household. Looking at this specific group of over 400 Moms yielded specific back to school insights.

Results were analyzed by Insight to Action, Inc.

III. BACK TO SCHOOL IMPACT ON MOMS’ BEHAVIOR

Since 2007, the percent of Moms agreeing that “Back to School” causes a major reevaluation of the family’s priorities and spending behavior has dramatically increased. In 2008, over 70% of Moms plan routines, spending and set resolutions around Back to School.

School Age Moms

“Please indicate whether you personally agree or disagree with the followings statement”

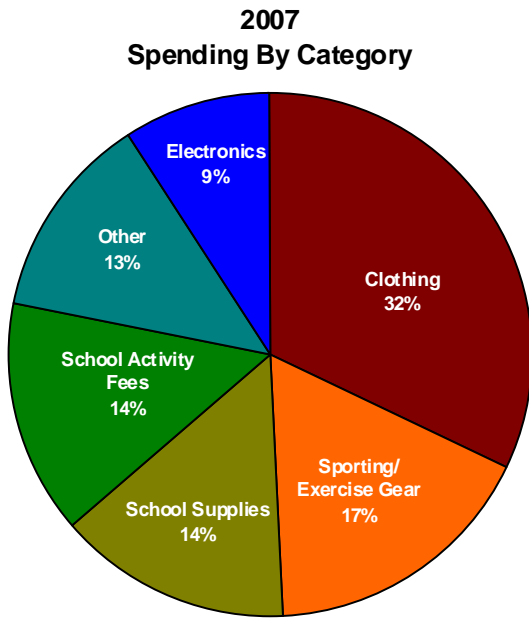
| | 2007 | 2008 |
|---|-------------|-------------|
| I plan my routines and spending for the year as part of Back to School | 51% | 70% |
| I set my new resolutions and priorities for the school year with Back to School | 44% | 75% |
| I plan to pack more healthy lunches for any child(ren) this year | 63% | 68% |



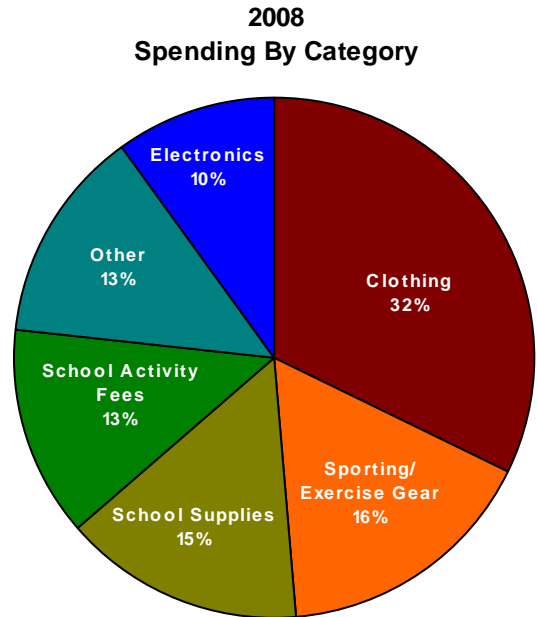
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IV. BACK TO SCHOOL SPENDING TOTAL \$ AND BY CATEGORY

Among School Age Moms, expected 'Back to School' spending for 2008 is modestly higher (a 8% increase). In particular, moms are planning to spend more this year on clothing, electronics and school supplies.

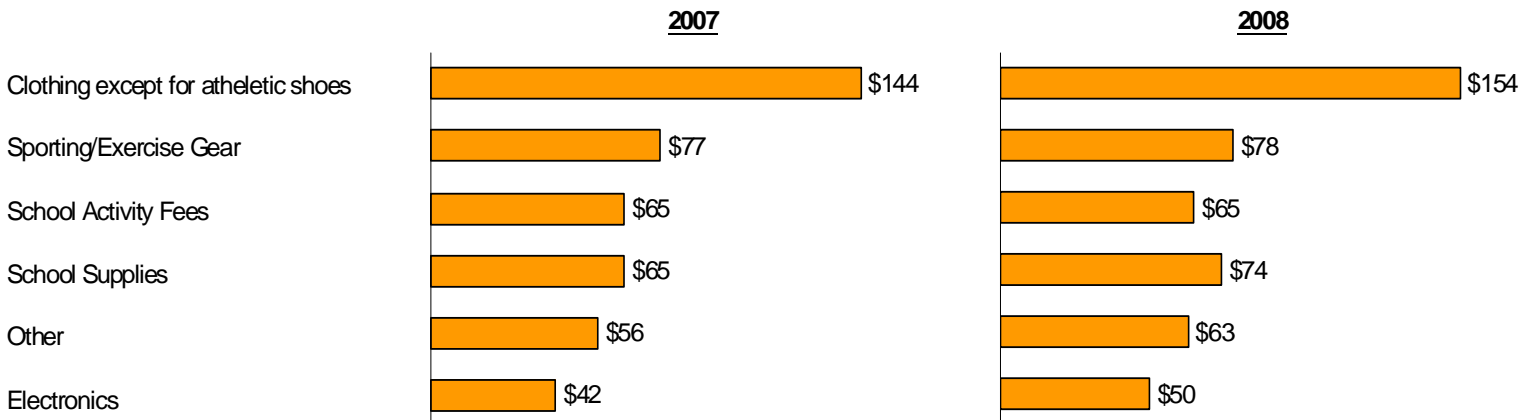


Average Amount
per Household
\$449



Average Amount
per Household
\$484

Back to School Moms 2007 Mean Spending By Category

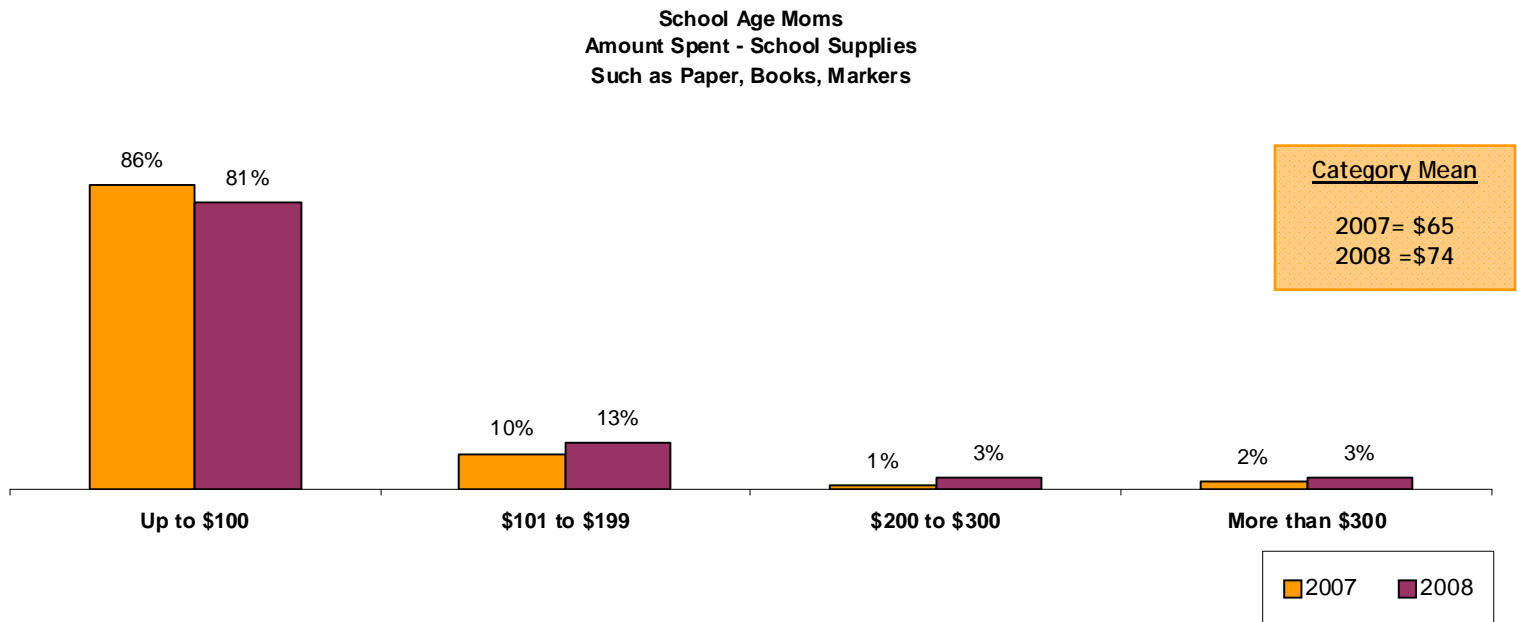
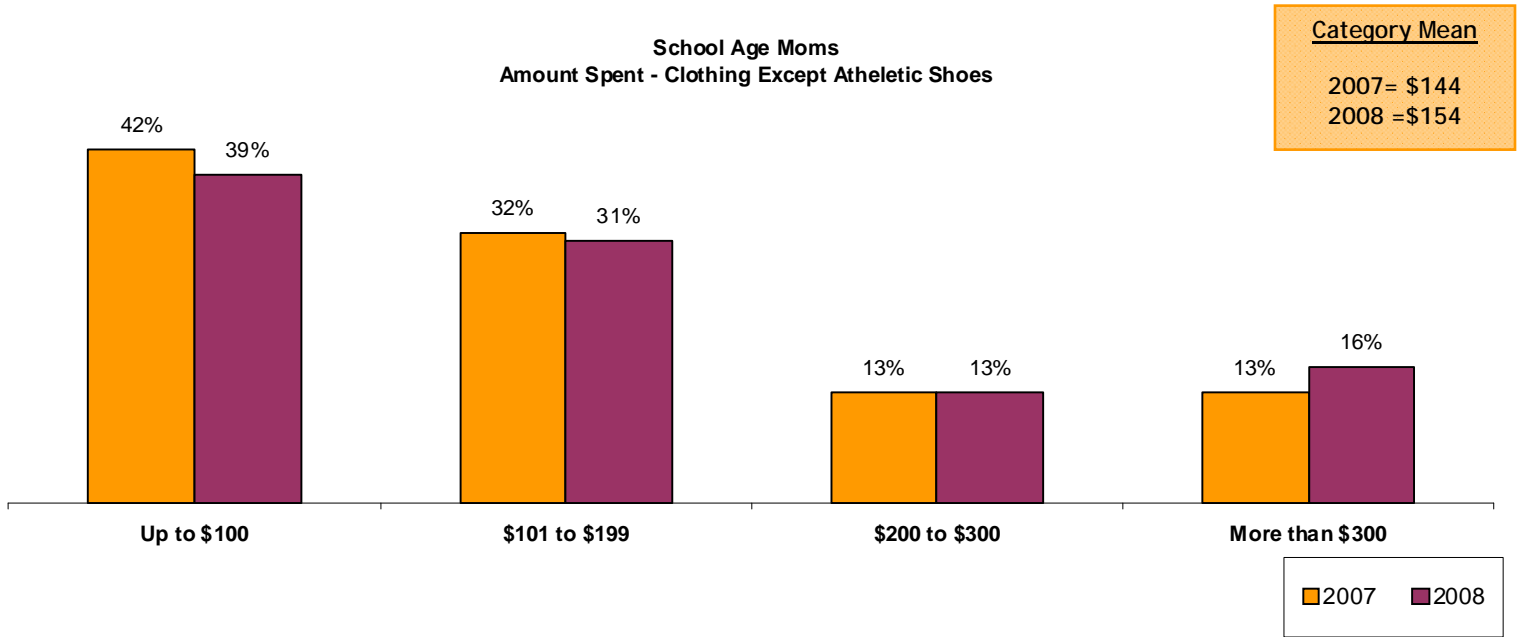




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IV. BACK TO SCHOOL SPENDING TOTAL \$ AND BY CATEGORY (CONT.)

The clothing category still has the highest Back to School spending (\$154 average), with slightly more of moms planning to spend over \$300 in 2008. Projected average spending on School Supplies has also increased from \$65 in 2007 to \$74 in 2008.

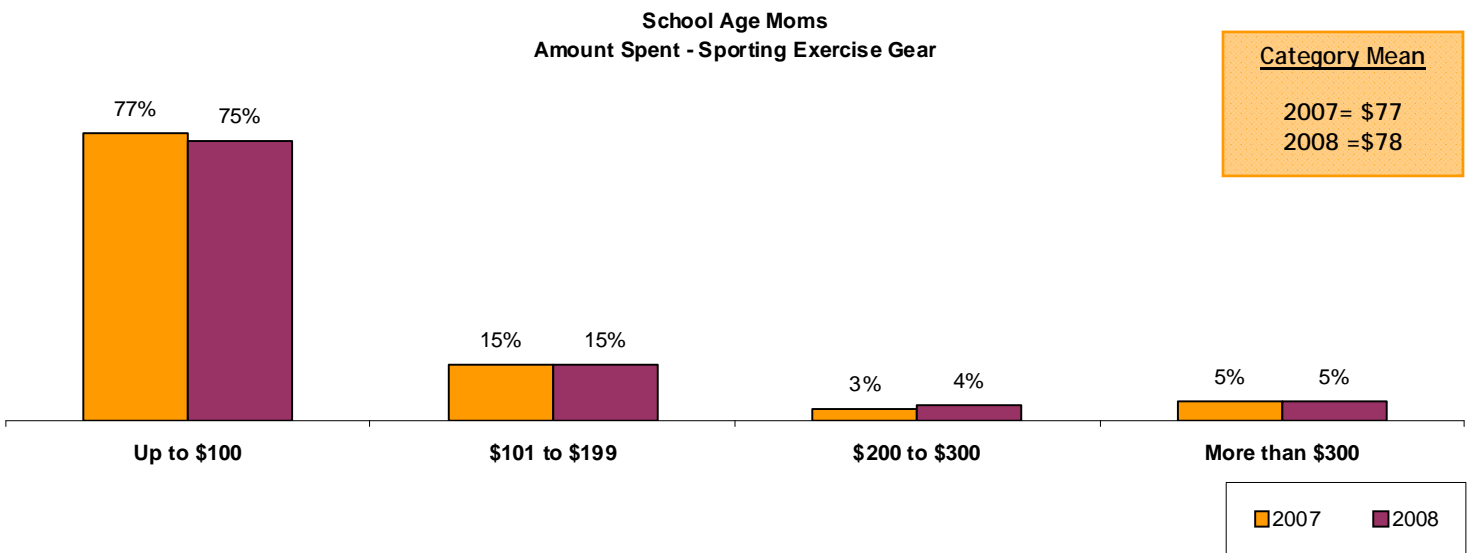
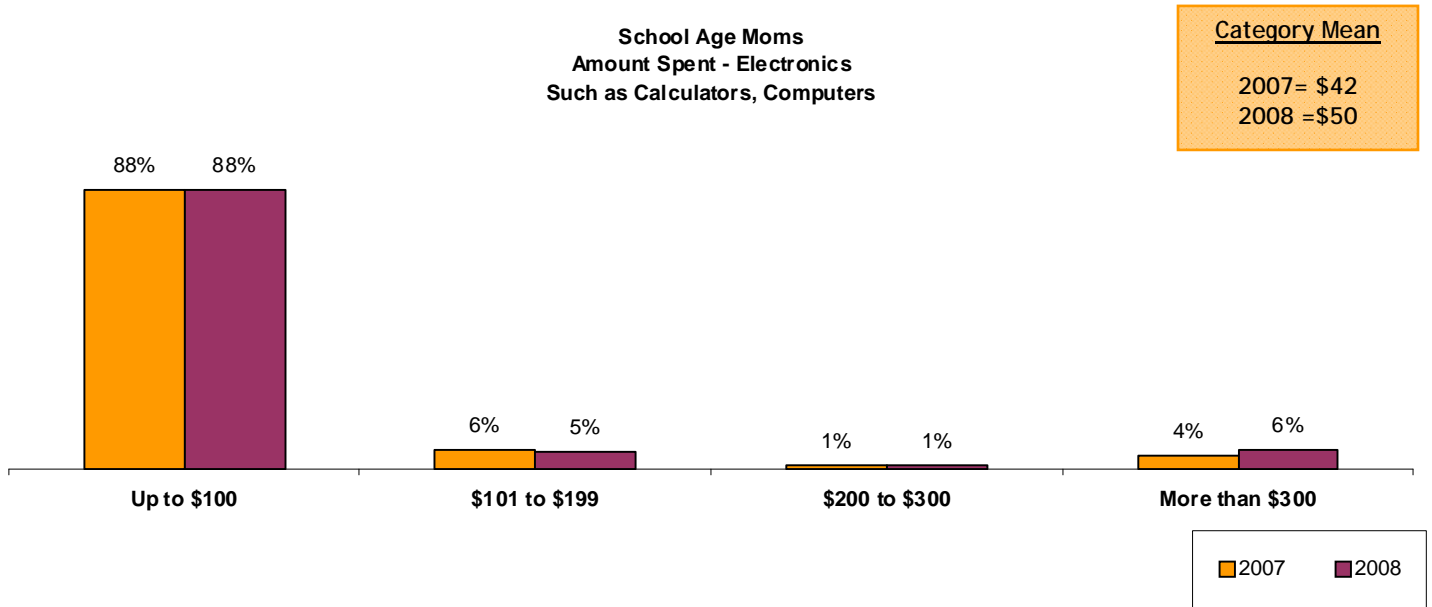




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IV. BACK TO SCHOOL SPENDING TOTAL \$ AND BY CATEGORY (CONT.)

While estimated spending on Sporting/exercise gear including uniforms, shoes and equipment has remained the same, projected spending on Electronics has increased to an average of \$50.

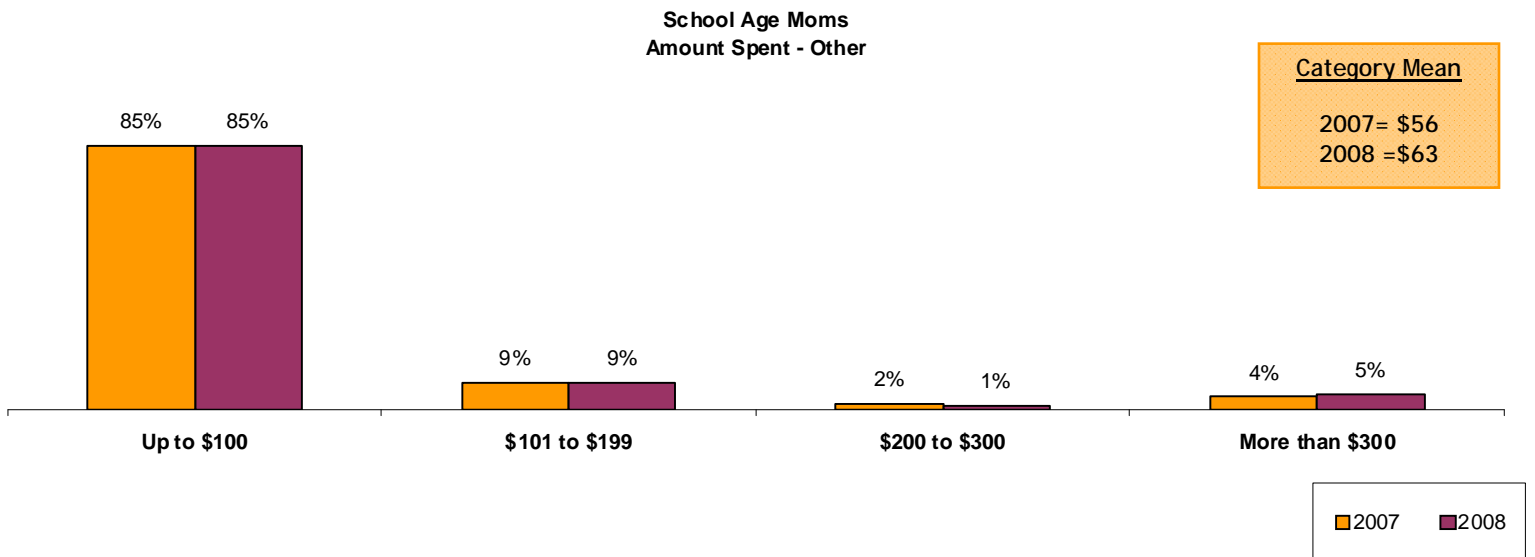
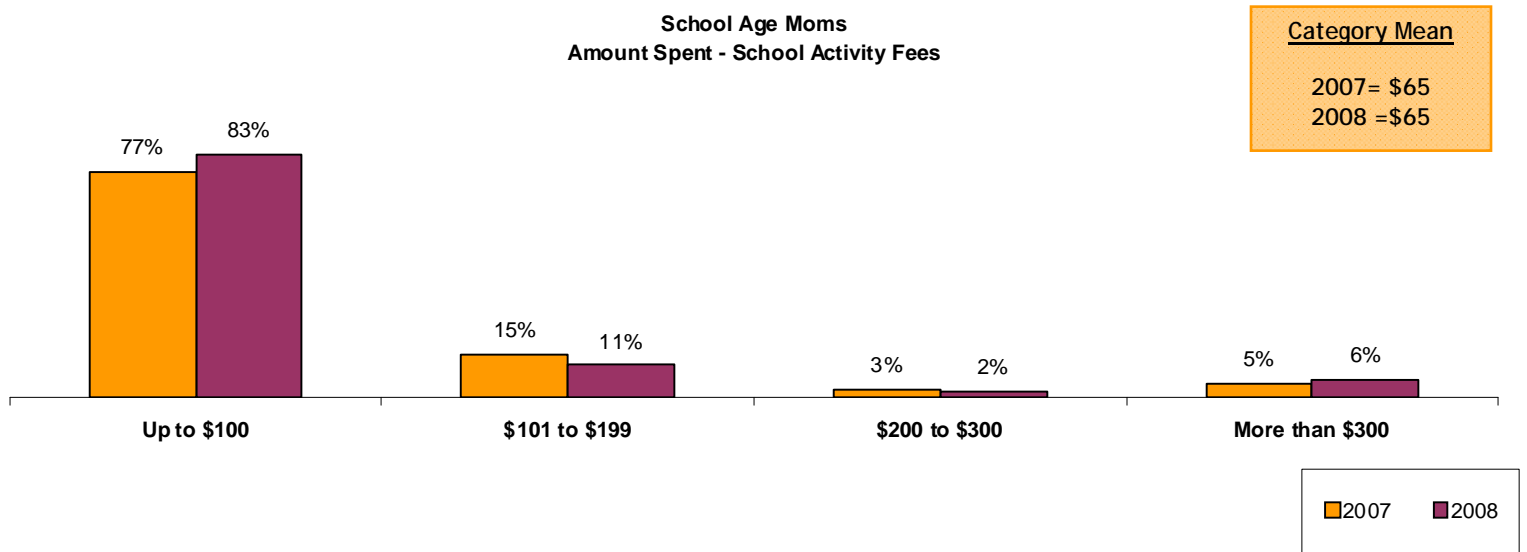




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IV. BACK TO SCHOOL SPENDING TOTAL \$ AND BY CATEGORY (CONT.)

School Activity Fees continue at \$65 average cost. However, School Age Moms do foresee a slight increase in other miscellaneous items (\$63 average).



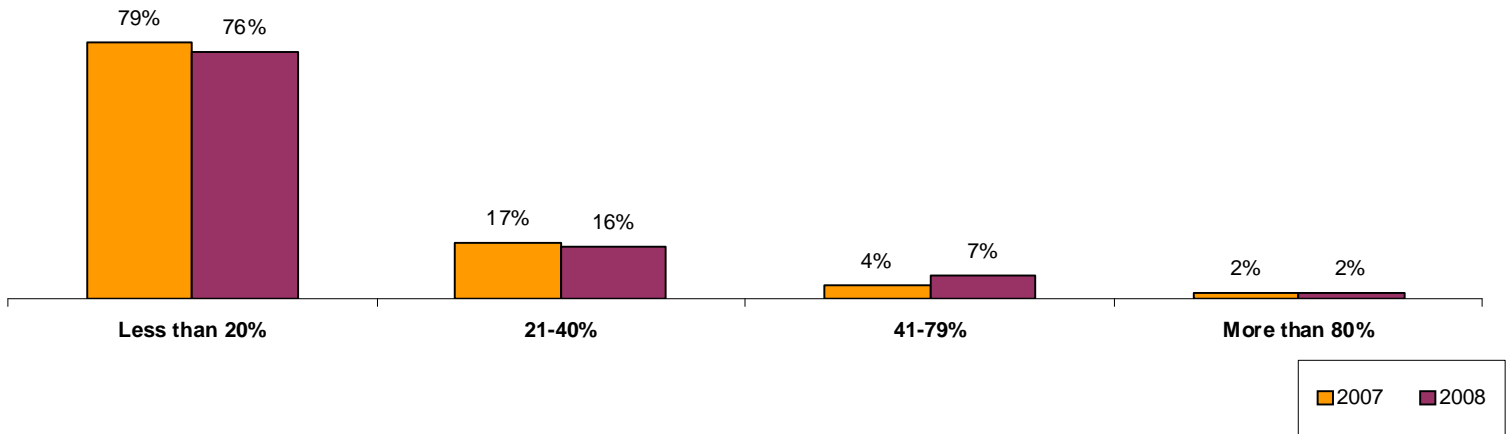


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IV. BACK TO SCHOOL SPENDING – ONLINE

25% of Moms plan on doing more than 20% of their Back to School Shopping online – essentially the same as 2007 (which was 23%). Online spending increases are much greater at 21% than offline spending

School Age Moms
"How Much of Your Total 'Back to School' Spending Will Be Online?"



School Age Moms

| <u>2007</u> | |
|---------------|--------------------------|
| | Average \$ Per Household |
| Online – 17% | \$76 |
| Offline – 83% | \$373 |

| <u>2008</u> | |
|---------------|--------------------------|
| | Average \$ Per Household |
| Online – 19% | \$92 |
| Offline – 81% | \$392 |

| <u>2007-2008</u> | |
|------------------|------------|
| Online Increase | 21% |
| Offline Increase | 6% |

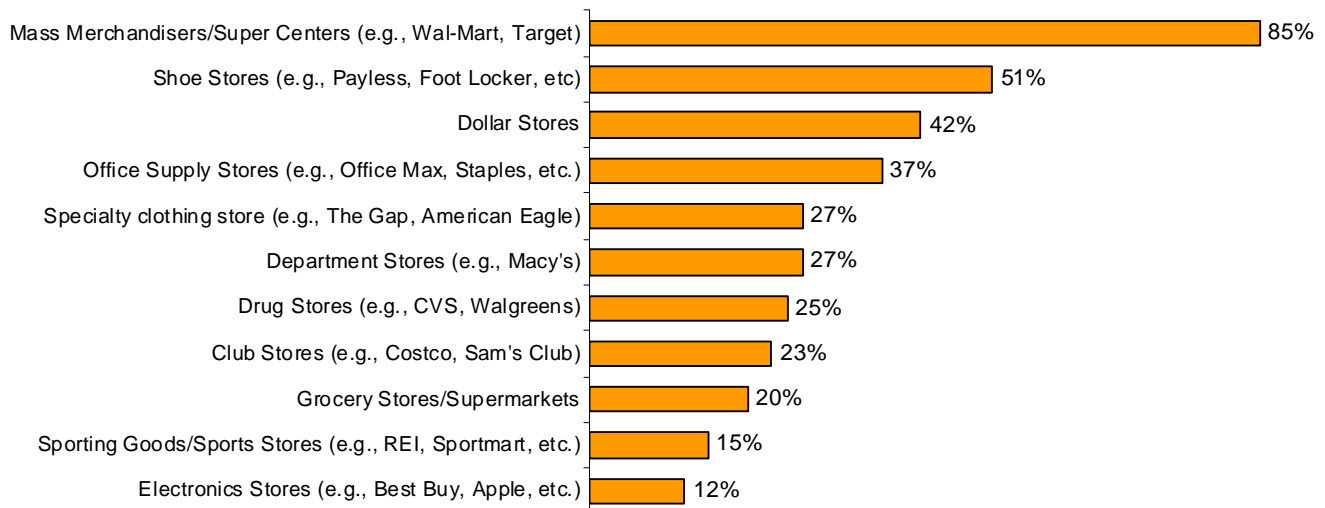
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IV. BACK TO SCHOOL SPENDING – KEY RETAILERS

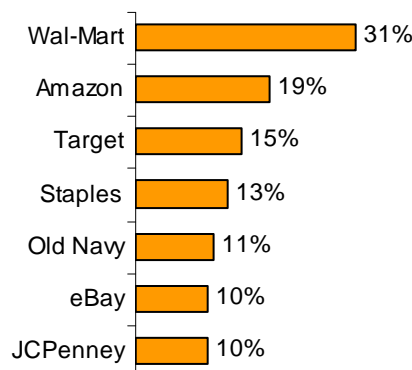
Mass merchandisers/supercenters are the most popular for 2008 Back to School shopping; 85% of Moms claim they plan to shop places such as Wal-Mart and Target, followed by more specialized channels, including Shoe Stores at 51%, Dollar Stores at 42% and Office Supply stores at 37%.

School Age Moms
Which of the following types of stores, if any, do you plan to shop at for Back to School?



Wal-Mart.com also tops the list as the most popular website for online Back to School shopping, followed by Amazon.com and Target.com.

2008
Top Websites for Online Back to School Shopping
(% of School Age Moms listed website(s)*)



Note*: Excludes School Age Moms answered None, N/A

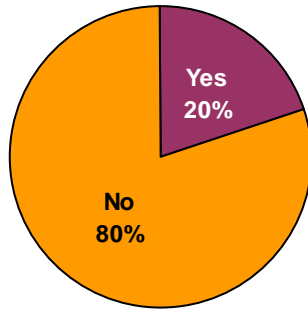


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Interestingly, 20% of moms also claim their child's school offers a service with an outside company, allowing them to buy some school supplies through the school vs. going to stores.

2008 School Age Moms

Does Oldest Child's School Offer a Service with an Outside Company That Allows you to Buy School Supplies or Textbooks through the School?



V. ADDITIONAL INSIGHTS – SCHOOL PHYSICALS

In addition to impacting household schedules, yearly resolutions and spending, 42% of Moms will also have to factor in getting their children ready for the school year by scheduling a physical exam for their child.

School Age Moms

Did you have to get a physical exam for your child this year for Back to School?

