

Back-to-School Purchase Study

Conversation export • September 14–15, 2026

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User

I want to do a 15 minute survey about the drivers behind intent to purchase for back-to-school items among the drivers to test I want to include excitement about back-to-school anticipation about back-to-school the enjoyment of office supplies, prices of office supplies and school supplies, and brand recognition.

Suggest other drivers to be tested. I want to be able to generate data that can then be analyzed using factor analysis and regression analysis to truly determine what drives intent to purchase for back to school items.

A

Assistant

To identify what truly drives back-to-school purchase intent, test both positive motivations and friction/barrier variables. Your current drivers cover emotion, enjoyment, price, and brand recognition. I'd add the following constructs.

Recommended drivers

Driver	What it captures
Perceived value	Whether shoppers believe the products are worth the money
Product quality	Durability, performance, and reliability
Variety and selection	Ability to find the right styles, sizes, colors, and products
Convenience	Ease of finding, comparing, and purchasing items
Availability/in-stock status	Confidence that desired products will be available
One-stop shopping	Ability to buy most back-to-school items in one place
Promotions and discounts	Influence of sales, coupons, bundles, and deals
Budget pressure	Financial constraints and sensitivity to total basket cost
Need urgency	How necessary or time-sensitive the purchases feel
Planning/readiness	Whether the shopper has a list, plan, or established shopping routine
Child/student influence	Preferences or requests from the child or student
Parent control/self-efficacy	Confidence in choosing appropriate products
Social norms	Influence of peers, other parents, teachers, or school expectations
Self-expression/style	Desire for items that reflect personality or identity
Novelty/trends	Appeal of new, fashionable, or currently popular products
Sustainability	Importance of recycled, reusable, ethical, or low-waste products
Trust	Confidence in the retailer, product claims, and return policies
Retailer experience	Store atmosphere, website usability, service, and checkout experience
Omnichannel convenience	Value of pickup, delivery, mobile shopping, and online browsing

Driver	What it captures
School requirements	Impact of required lists, specifications, or teacher recommendations
Perceived risk	Concern about buying the wrong item, poor quality, or wasted money
Seasonal ritual	Back-to-school shopping as a family tradition or milestone

Especially important additions

If survey length is limited, I would prioritize:

1. Perceived value
2. Product quality
3. Promotions and discounts
4. Convenience and one-stop shopping
5. Availability
6. Child/student influence
7. School requirements
8. Budget pressure
9. Planning/readiness
10. Retailer trust

These are likely to explain purchase intent more effectively than brand recognition alone. Brand recognition should ideally be separated from unaided brand awareness, aided brand awareness, brand familiarity, brand trust, brand consideration, and brand preference.

Suggested survey structure

- Screening and purchase context: 1–2 minutes
- Back-to-school shopping behavior: 2 minutes
- Driver measurement: 7–8 minutes
- Purchase intent and outcomes: 2 minutes
- Demographics and segmentation: 2 minutes

Use approximately 4–5 statements per driver, measured on a consistent 5- or 7-point agreement scale. Avoid asking only one question per driver. Factor analysis needs multiple observed items to determine whether items reliably form underlying constructs.

Outcome variables

- Likelihood to purchase back-to-school items in the next 30 days
- Likelihood to purchase from the specific retailer or brand
- Expected spending

- Expected number of items purchased
- Likelihood of switching brands or retailers
- Likelihood of recommending the retailer or brand

Analysis design

1. Conduct exploratory factor analysis to identify the underlying driver dimensions.
2. Assess reliability using Cronbach's alpha or preferably omega.
3. Remove items with weak loadings, high cross-loadings, or poor conceptual fit.
4. Create factor scores or construct averages.
5. Run regression with purchase intent as the dependent variable.
6. Include controls such as age, income, number of children, student age, shopping frequency, prior brand use, and expected spending.
7. Test interactions where relevant.
8. Validate the factor structure with confirmatory factor analysis or a holdout sample if the sample size permits.

A useful regression model might be: Purchase intent = emotional excitement + anticipation + value + price sensitivity + quality + convenience + availability + promotions + brand familiarity + child influence + school requirements + controls.

Measure both positive drivers and negative barriers. Otherwise, the analysis may identify what encourages shopping without revealing what prevents it. Aim for at least 300 respondents, with 500+ preferable if you expect multiple shopper segments or many driver constructs.

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User

What is the dependent variable for this particular study?

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Assistant

The primary dependent variable is **intent to purchase back-to-school items**.

Use a multi-item purchase-intent scale rather than a single question:

- Likelihood of purchasing back-to-school items
- Likelihood of purchasing school or office supplies
- Likelihood of purchasing from the preferred retailer
- Likelihood of purchasing additional, non-required items

You can average these into a **purchase-intent index**, provided they demonstrate acceptable reliability.

Secondary dependent variables could include expected back-to-school spending, expected number of items purchased, likelihood of switching brands or retailers, and likelihood of recommending the retailer.

The independent variables are the tested drivers—such as excitement, anticipation, enjoyment, price perceptions, quality, convenience, promotions, brand familiarity, and student influence.

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User

How would you change this if the dependent variable was likelihood to buy premium or branded over private label and audience of parents buying for K-12 kids?

A

Assistant

I would reposition the study from "Will parents buy?" to:

"Under what conditions do parents choose premium or national brands instead of private-label alternatives for K–12 back-to-school items?"

The dependent variable should measure **premium/branded purchase preference**, not general purchase intent.

Revised dependent variable**DV1. Brand-choice preference**

"For back-to-school purchases, which would you usually prefer?"

1. Lowest-priced private label
2. Private label unless a national brand is on sale
3. No preference
4. National brand unless private label offers better value
5. Premium or national brand, even at a higher price

DV2. Willingness to pay a premium

"How much more would you be willing to pay for a premium or national brand compared with a similar private-label product?"

1. Nothing more
2. Up to 5% more
3. 6–10% more
4. 11–20% more
5. More than 20%
6. It depends on the product

DV3. Purchase likelihood under price conditions

"How likely would you be to choose the premium or national brand if it cost..." The same as private label, 10% more, 20% more, 30% more, or 50% more. Use a 7-point likelihood scale.

DV4. Actual or intended premium purchasing

"Which statement best describes your expected back-to-school purchases?" Almost entirely private label; mostly private label; a mix leaning private label; an even mix; a mix leaning national or premium brands; mostly national or premium brands; almost entirely national or premium brands.

Important change: use product-specific choices

Category	Expected preference
Pencils and writing instruments	Private label / no preference / national or premium
Notebooks and paper	Private label / no preference / national or premium
Binders and folders	Private label / no preference / national or premium
Backpack	Private label / no preference / national or premium
Lunchbox or water bottle	Private label / no preference / national or premium
Calculator or electronics	Private label / no preference / national or premium
Clothing or shoes	Private label / no preference / national or premium

Revised driver battery

Keep excitement, anticipation, and enjoyment, but treat them as broader shopping attitudes rather than the central explanatory variables.

- **Perceived quality:** Premium brands are more durable; national brands perform more reliably; a higher price often signals better quality; I want products that will last through the school year.
- **Functional risk:** I worry that a cheaper product may fail or need to be replaced; some products are too important to buy based on price alone; I prefer a proven product when the consequences of failure are high; replacing a poor-quality item would be inconvenient.
- **Brand trust and familiarity:** I trust brands I have used before; familiar brands make me more confident; I know what to expect from established brands; I am willing to pay more for a brand I trust.
- **Child preference and influence:** My child requests specific brands; my child can distinguish between brands; my child’s preferences influence my willingness to pay more; I want my child to be happy with the products selected.
- **Perceived value:** Premium brands provide better value over time; a more expensive product can be worthwhile if it lasts longer; private-label products often offer better value; I compare expected performance, not just purchase price.
- **Price and budget constraints:** My budget limits how often I choose premium brands; I choose private label when the quality difference is unclear; I buy premium brands only when discounted; I am willing to pay more for certain categories but not others.
- **School and product importance:** School requirements influence the brand I choose; I am more likely to choose premium brands for products used every day; I am more likely to choose premium brands for products difficult to replace; brand matters more for some categories than others.

- **Promotions:** A sale makes premium brands more attractive; coupons increase my likelihood of choosing a national brand; I look for premium brands when the price gap is small; bundles or multipacks can justify choosing a branded product.
- **Social and identity factors:** My child cares about recognizable brands; brand choice can affect how my child feels about using the product; I prefer products that reflect my child's personality or style; other parents' choices influence my perceptions.

For K–12 parents, social and identity factors may matter more for older children than for elementary-age children.

Recommended regression model

Premium/branded preference = quality expectations + functional risk + brand trust + child influence + perceived value + price sensitivity + promotions + school requirements + product importance + parent/child controls.

Use ordered logistic regression for the 1–7 premium-preference scale, ordinary least squares only if the scale behaves approximately continuously and assumptions are acceptable, logistic regression for binary category-level choices, and multilevel logistic regression for repeated product-category observations.

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User

Rewrite the study with this in the mix of audiences, parents of K-12 children, and dependent variable is likelihood to buy premium or branded over private label.

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Assistant

Back-to-School Premium and Branded Purchase Study

Study objective

Identify the emotional, functional, financial, and social drivers that influence whether shoppers choose premium or national-brand back-to-school products over comparable private-label products.

Target audiences

1. Parents or legal guardians of at least one child in grades K–12 who expect to purchase back-to-school items.
2. Adults purchasing back-to-school items for themselves.
3. Other adults purchasing for a K–12 student, such as relatives or guardians.

Analyze parents of K–12 children as a distinct primary segment.

Recommended sample

Aim for at least 400 respondents, including at least 250 parents of K–12 children. For stronger subgroup analysis, target approximately 500–600 total respondents.

Screening

S1. Are you involved in purchasing back-to-school products for yourself or another student?

1. Yes
2. No — terminate

S2. Which best describes the person you are purchasing for?

1. Myself
2. My child or children in grades K–12
3. Another K–12 student
4. A college or university student
5. Other — terminate

S3. What grade or grades will the student(s) enter? Select all that apply: Kindergarten; Grades 1–2; Grades 3–5; Grades 6–8; Grades 9–10; Grades 11–12; Not applicable — purchasing for myself.

S4. How involved are you in deciding which brands or products are purchased?

1. I make nearly all decisions
2. I make decisions jointly with the student
3. The student makes most decisions
4. Someone else makes most decisions

S5. Which types of back-to-school products do you expect to purchase? Select all that apply: Writing instruments; Notebooks or paper; Binders or folders; Art or classroom supplies; Backpack or bag; Lunchbox or water bottle; Clothing or shoes; Calculator or electronics; Dorm or room items; Other.

Shopping context

Q1. When do you expect to begin back-to-school shopping? More than two months before school starts; one to two months before; two to four weeks before; within one week; after school starts; not sure.

Q2. Approximately how much do you expect to spend? Less than \$25; \$25–\$49; \$50–\$99; \$100–\$199; \$200–\$399; \$400 or more; not sure.

Q3. How much planning have you done? None; a little; some; a lot; everything is already planned or purchased.

Q4. Who typically pays? I pay; the student pays; we share the cost; someone else pays; it varies.

Q5. Which shopping channels do you expect to use? Physical retail store; retailer website; retailer mobile app; online marketplace; school or organization; social media or live shopping; other.

Main driver battery

Thinking about your upcoming back-to-school shopping, indicate how much you agree or disagree with each statement.

1 Strongly disagree · 2 Disagree · 3 Somewhat disagree · 4 Neither agree nor disagree · 5 Somewhat agree · 6 Agree · 7 Strongly agree

Randomize the sections and items.

Construct	Items
Excitement	I feel excited about back-to-school shopping; back-to-school shopping is something I look forward to; the back-to-school season creates positive energy for me; shopping for these products feels fun and engaging.
Anticipation and preparation	I am looking forward to the start of the school year; back-to-school shopping makes the upcoming school year feel more real; I enjoy preparing for a new school year; back-to-school shopping feels like an important seasonal milestone.
Enjoyment of school and office supplies	I enjoy browsing school and office supplies; I like comparing different product options; new stationery and school supplies are appealing to me; I enjoy selecting the specific products I will buy.

Construct	Items
Perceived quality and durability	Premium or national brands generally offer better quality; I want products that will last through the school year; branded products are more likely to perform reliably; I am willing to pay more for better-quality products.
Functional risk	I worry that a cheaper product may fail or need to be replaced; some products are too important to buy based on price alone; I prefer a proven product when poor performance would cause problems; replacing a poor-quality product would be inconvenient.
Brand familiarity and recognition	I recognize many brands available; familiar brands make me more confident; I am more likely to consider brands I have used before; brand name is important for some products.
Brand trust	I trust brands I have used previously; established brands provide more consistent quality; I know what to expect from familiar brands; I am willing to pay more for a brand I trust.
Perceived value	A premium product can be a better value if it lasts longer; I consider expected performance, not just purchase price; premium brands are worth the extra cost in some categories; private-label products often provide better value.
Price sensitivity and budget pressure	My budget limits how often I choose premium brands; I choose private label when the quality difference is unclear; I compare prices before deciding; I am concerned about total cost.
Promotions and discounts	A sale makes premium brands more attractive; coupons increase my likelihood of choosing a national brand; I look for premium brands when the price gap is small; bundles or multipacks can justify choosing a branded product.
Product importance and school requirements	School requirements influence the brands I choose; I am more likely to choose premium brands for products used every day; I am more likely to choose premium brands for products difficult to replace; I make different choices for required and optional products.
Child or student influence	The student requests specific brands; the student has strong preferences; the student's preferences influence my willingness to pay more; I want the student to be happy with the products selected.
Social influence and self-expression	I pay attention to what other students or families are buying; recommendations influence me; recognizable brands matter to the student's identity or style; trends influence some purchases.
Sustainability	I prefer reusable products; environmentally responsible products are important; I look for recycled or sustainable materials; I would consider paying more for a sustainable product.

Construct	Items
Convenience and availability	I prefer to purchase most items in one place; convenience influences where I shop; I expect desired products to be in stock; limited availability would cause me to choose another brand or retailer.

Primary dependent variable: premium or branded purchase likelihood

For each question, think about a comparable private-label product that meets the same basic need.

1 Very unlikely · 2 Unlikely · 3 Somewhat unlikely · 4 Neither likely nor unlikely · 5 Somewhat likely · 6 Likely · 7 Very likely

- 1. How likely are you to choose a premium or national-brand product instead of private label?
- 2. How likely are you to pay more for a premium or national-brand product?
- 3. How likely are you to choose a familiar brand when a similar private-label product is available?
- 4. How likely are you to choose a premium or national brand for products used every day?
- 5. How likely are you to choose a premium or national brand for products where durability matters?
- 6. How likely are you to choose a premium or national brand for products selected by the student?
- 7. How likely are you to buy premium or branded products even when they are not on sale?
- 8. How likely are you to recommend premium or national brands to another parent or shopper?

Create a primary **Premium/Branded Purchase Likelihood Index** by averaging items 1–7 if acceptable reliability is demonstrated. Item 8 is a secondary outcome.

Price tradeoff module

PT1. How much more would you be willing to pay for a premium or national-brand product compared with a similar private-label product? Nothing more; up to 5% more; 6–10% more; 11–20% more; 21–30% more; more than 30%; it depends on the product.

PT2–PT4. How likely would you be to choose the premium or national brand if it cost 10%, 20%, or 30% more? Use the 1–7 likelihood scale.

Product-category choice module

For each category, ask: “Which would you be more likely to purchase?” Private label; no preference; national or premium brand.

Categories	Follow-up
Pencils and writing instruments; notebooks and paper; binders and folders; art or classroom supplies; backpack or bag; lunchbox or water bottle; calculator or electronics; clothing or shoes	How important is brand when purchasing this category? 1 Not at all important to 5 Extremely important.

Brand recognition module

Use a category-appropriate randomized list containing national brands, premium brands, private-label brands, and at least one fictitious brand for quality control.

1. Which brands have you heard of?
2. Which brands have you purchased in the past two years?
3. Which brand would you be most likely to purchase for back-to-school items?
4. Which brand do you consider best overall for back-to-school products?

Respondent profile

Collect age, gender identity, annual household income, number of children in grades K–12, grade of the primary child, school type (public, private, charter, homeschool, other), region, school-supply shopping frequency, and general price sensitivity.

Data-quality check

Ask respondents to select “Agree” on the standard 1–7 agreement scale.

Analysis plan

Primary dependent variable: Premium/Branded Purchase Likelihood Index based on items 1–7 above.

Secondary dependent variables: willingness to pay a premium; premium choice at 10%, 20%, and 30% price premiums; category-level branded choice; brand importance by product category; and brand recommendation likelihood.

Run exploratory factor analysis on the driver battery. Evaluate item loadings, communalities, cross-loadings, and reliability. Create factor scores or averaged construct scores. Regress the Premium/Branded Purchase Likelihood Index on the resulting factors, controlling for household income, number of K–12 children, grade level, school type, expected spending, planning stage, parent versus non-parent status, decision-making involvement, and general price sensitivity.

For the 1–7 index, ordinary least squares may be used if assumptions are acceptable, with ordered logistic regression as a robustness check. Category-level choices should

use logistic regression, with multilevel modeling when each respondent evaluates multiple product categories.

The central research question is: Which factors most strongly increase the likelihood that a shopper will choose a premium or national brand over a comparable private-label product, and how does that relationship vary across K–12 parents, grade levels, income groups, and product categories?

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export this chat verbatim, including the versions of the study and the tables of constructs and drivers - the conversation export should look exactly like the chat screen