

# BACK to SCHOOL 2021 OVERVIEW



**PUBLICIS  
COMMERCE**



# 2021 Back to School Landscape

Return to school this year takes on a whole new meaning. Not only are kids and university student stocking up on pens, pencils and school gear, many of us are also preparing for a return to something – whether that be school, work or travel.

Publicis Commerce compiled our 2021 Back to School overview by taking a look at some of the biggest trends we're seeing and offering insight from what our partners have said on the subject.

This report is underpinned by a deep dive analysis we conducted using our proprietary technology tool **Commerce Intelligence**, which offers insights and analysis into what's happening on the digital shelf and offers brands prioritized actions and optimizations for winning across commerce retailers. We analyzed the top Back to School related categories – from electronics to office & school supplies to teaching materials – to uncover the top brands that played in each category, identify sales strategies and provide tips for brands looking to understand how to win during a shopping event like Back To School.

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# Back to School By the Numbers

After declining by 4.6% last year, total back to school sales will grow by 9.3% in 2021 to reach \$95.83B.

eMarketer

US parents are increasing their shopping digitally YOY by ~28%.

eMarketer

According to Google, 1 in 4 college students and 1 in 5 K-12 students already started their back to school shopping by April 2021.

53% of consumers plan on purchasing denim for Back To school and Females are 58% more likely to purchase jeans!

Google Consumer Surveys,  
Back to School Clothing

In 2021, half of US back to School Shoppers plan to spend more this year vs last year.

Google Consumer Surveys

Snapchatters are 2X as likely to be influenced by friends and family than influencers for BTS purchases.

2021 Crowd DNA Research

32% of Target guests state they will be investing in their at home learning set up.

Roundel

46% of Target shoppers plan on spending \$100-\$200 per child.

Crowd DNA, commissioned by Snap

Over 50% of students on Snapchat say their friends rely on them for recommendations when deciding to buy.

Snap Inc

68% of parents purchased their back to school items online.

Crowd DNA research, Back to School,  
commissioned by Snap

46% of students told their friends and family about their back to school purchases.

Crowd DNA, commissioned  
by Snap

# Commerce Intelligence's View of Top Sellers

Using our proprietary tool **Commerce Intelligence**, the technology backbone of Publicis Commerce's practice, we wanted to understand which categories and which brands within those categories were owning the Back-to-School space. Additionally, we took a look at whether or not consumers were looking for deals or if Back to School is more about necessity buying habits. Here's what we found:

## Top Categories

We analyzed some of the most relevant back to school categories including Desktop Computers, Inkjet Printers, Laptops, Office & School Supplies, as well as Teaching Materials to see how they were performing and which brands and products were gaining the most attention in the lead up to kids returning to school.

For most of these categories, the data showed that only one or two brands were leading the way. HP led the way across the main electronics categories including printers, laptops and desktops, likely due to general affordability, extensive and optimized econtent, and well-directed copy supporting the various intents of shoppers' needs. The exception here was around the Office & School supplies category which saw a diverse grouping of brands, likely due to the wide range of products that fall into that group. Interestingly though, this is the only category that Amazon Basics has a strong presence.

| Category                 | Top Brand     | No. of Products |
|--------------------------|---------------|-----------------|
| Desktops                 | HP            | 28              |
| Inkjet                   | HP            | 43              |
| Laptops                  | HP            | 31              |
| Office & School Supplies | Amazon Basics | 10              |
| Teaching Materials       | Quartet       | 8               |

## Amazon's Play For Back To School

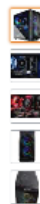
As we saw on the last page, Amazon made a play for the Office & School Supplies category, perhaps due to these products being necessities throughout the calendar year, so consumers are already used to buying them. Our data showed that for those products that are shopped year-round, in order to see a big spike around back to school, it is necessary to offer discounts to stay competitive. Consumers are now starting to expect discounts and we see off brand alternatives like AmazonBasics pop up in the space for less.

## Back To School Is About Necessity, Not Deals

Office & School Supplies saw some of the biggest discounts across the categories we analyzed, with discounts of more than a third of the original cost. This could likely be attributed to the already low price point of items within this category, such as notebooks, pens and pencils, compared to the higher priced categories we analyzed like desktops, laptops and printers.

| Category                 | Average discount percent |
|--------------------------|--------------------------|
| Desktops                 | 10.6%                    |
| Inkjet                   | 12.5%                    |
| Laptops                  | 14.6%                    |
| Office & School Supplies | 34.8%                    |
| Teaching Materials       | 27.6%                    |

Electronics > Computers & Accessories > Computers & Tablets > Desktops > Towers



Roll over image to zoom in

**Skytech Chronos Mini Gaming PC Desktop** - AMD Ryzen 5 3600 3.6GHz, GTX 1660 Super 6G, 16GB DDR4 3000, 500GB SSD, AC WiFi, Windows 10 Home 64-bit, Black  
 Visit the Skytech Gaming Store  
 ★★★★★ 36 ratings  
 | 52 answered questions

List Price: \$1,299.99 Details  
 Price: **\$1,049.99** ✓prime & FREE Returns  
 You Save: \$250.00 (19%)  
 Get \$25 off instantly when you add a debit card.  
 Click to add. Terms Apply  
 Size: RS 3600 | 1660 Super  
 Specific Uses For Product: Multimedia, Personal, Gaming

In the electronics department, we did see that laptop computers offered a higher discount compared to desktops. However, there were opportunities to purchase some niche desktop computers during back to school. For example, the Skytech Chronos Mini Gaming PC Desktop (ASIN: B0946451DV) offered \$250 off its original list price, resulting in the product shooting up the sales rank once the discount went into effect in July.

Additionally, due to Amazon's marketplace capabilities, we were able to see peer created resources in the teaching materials pop indicating that there is room for indie or niche products to make an appearance during back to school because consumers are more interested in utility around back to school needs versus brand name products themselves.

## Key Takeaways For Brands Looking To Win During Back To School

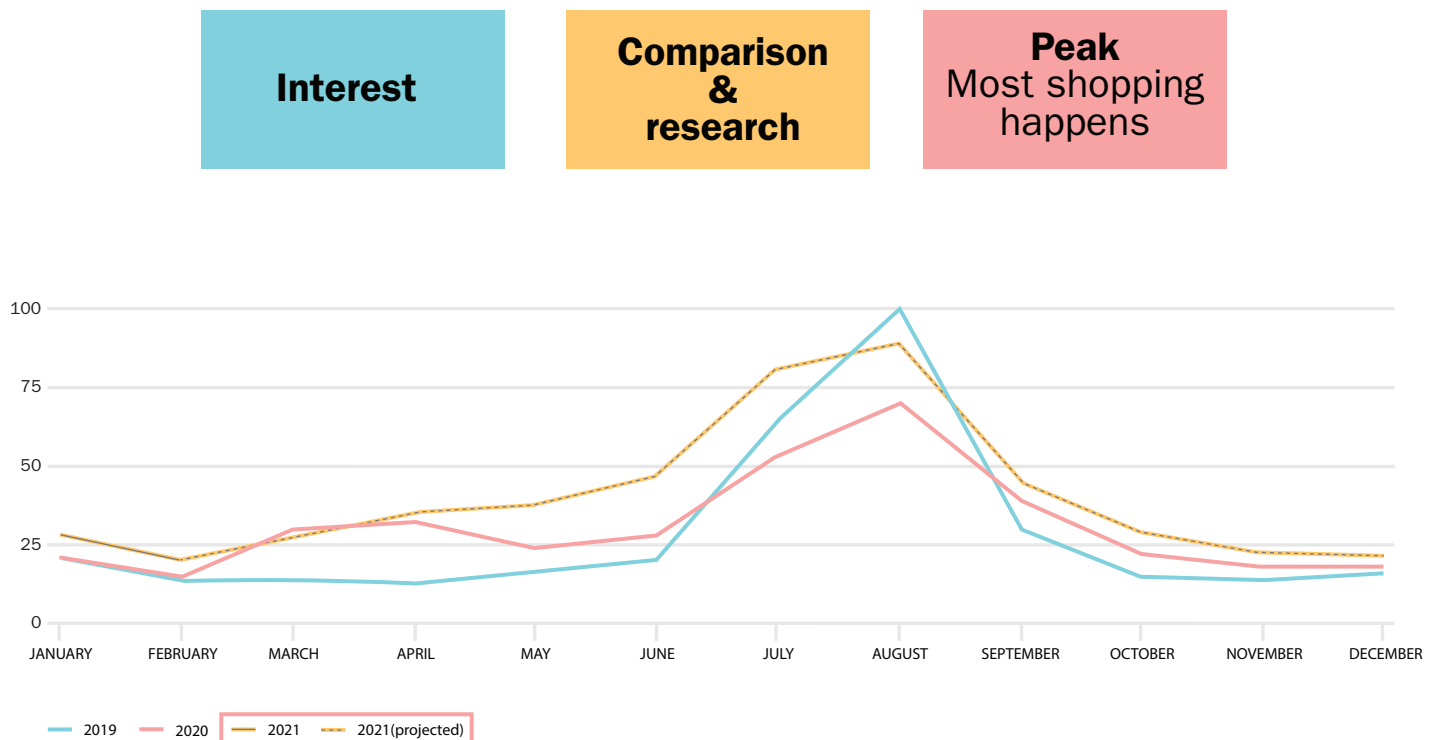
- 1. Keep your pricing competitive:** If your product is something that is purchased throughout the year, it is necessary to offer discounts to stand out during back to school. Additionally, keeping an eye on competitors' pricing strategies and inventories is critical in ensuring successful, tactical performance in marketing and advertising your products across retailers.
- 2. Make sure your brand tops the search ranks:** Our data showed that consumers are searching for electronics so brands in this space should not be afraid to spend more to find your target audience as we know they are willing to buy right now.
- 3. Lesser known brands have a chance to win:** Back to school is a time when shoppers are purchasing based on need, so lesser known brands have an opportunity to enter the best sellers list, when they normally wouldn't have had the chance if they can offer something that brand-names can't.

# How Has Shopping Shifted for Back to School?

Many of our partners ran analysis leading to the Back-to-school time frame to understand and predict how consumers would be shopping this year. When it comes to how Covid has impacted consumers' spending habits, research from Google showed that consumers were looking for information earlier than usual. While the peak of search was the same for the last three years, there was more search results as far back as April at higher number than the previous two years.

## Consumers are increasingly asking for more information earlier

"Back to School" searches are on the rise earlier each year



Source: Google Search Trends for "Back to School" terms (KG)

Our partners at Roundel were interested in understanding if certain categories were going to be purchased in different ways. They found that 59% of consumers were planning to purchase clothing, shoes and accessories online while 49% were planning to purchase general school supplies online. In-store did still remain high.

## How do you plan to shop the following categories for back to school?

**59%**

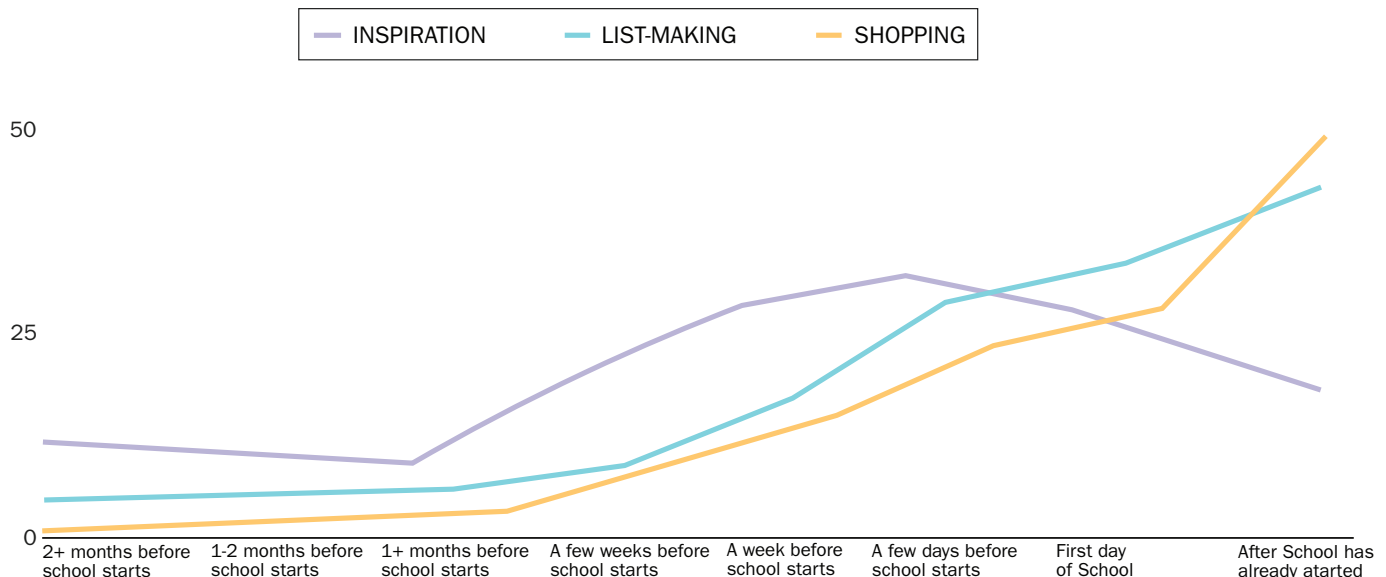
purchasing, clothing, shoes & accessories online

**49%**

purchasing general school supplies online

Snapchat found that parents on their platform are list-makers and continue to make a large bulk of their purchases once the school year begins.

## Parents on Snapchat are list-makers, but they make majority of their purchases as the school year begins.



2021 Crowd DNA, Back to School, research commissioned by Snap Inc.



# What Are They Shopping For?

In terms of what consumers are shopping for, traditional back-to-school material continue to remain at the top of the list. According to Google's back to school research, 75% of shoppers had planned to spend the same or more in each category this year. While Roundel found that 32% of consumers were planning to purchase more general school supplies than they had last year. In addition to classics like clothing and tech, Snap also found that furniture, hand sanitizer, and cleaning supplies were on people's back to school lists, an obvious reflection of Covid's continued impact on our daily lives.

## How much do you plan to shop the following categories for back to school compared to last year?

**33%**

state they are purchasing more clothing, shoes, accessories than last year

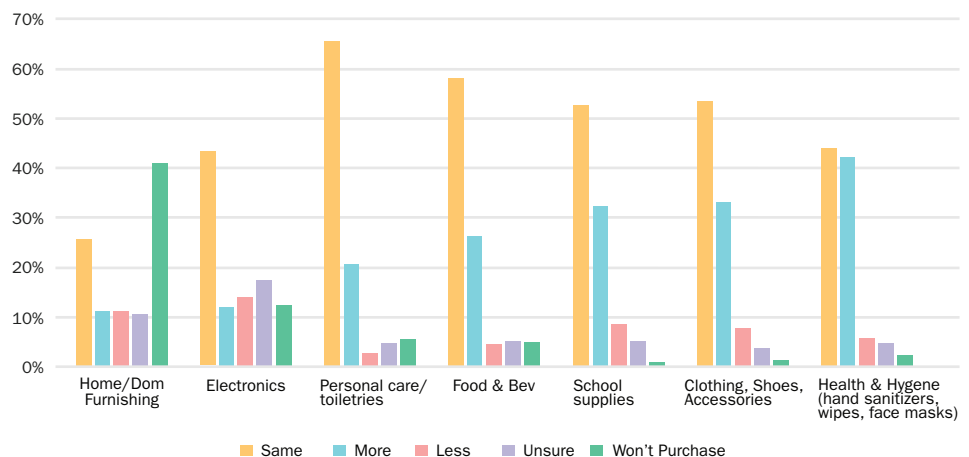
**42%**

state they are purchasing more health & hygiene products than last year

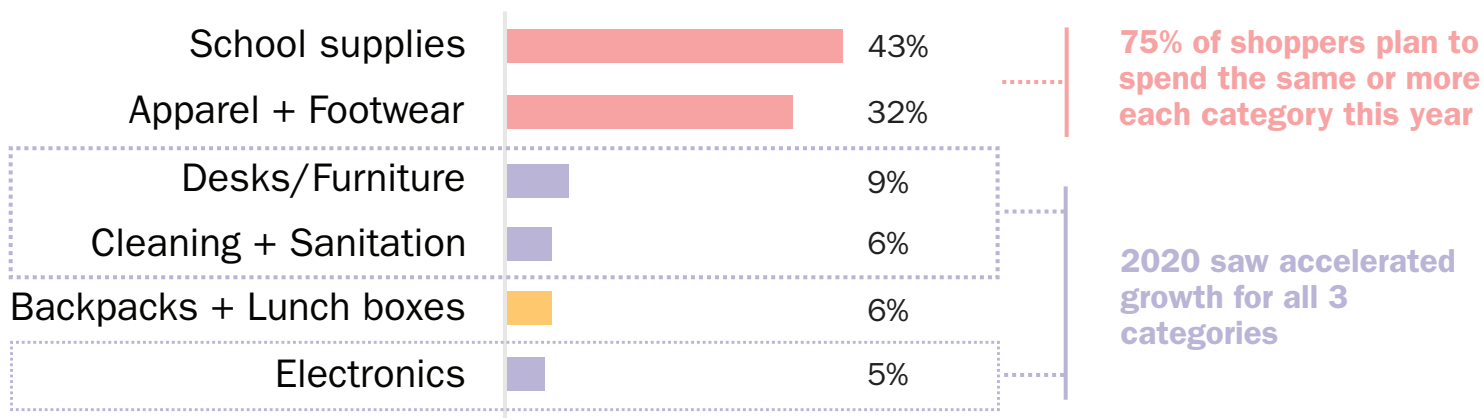
**32%**

state they are purchasing more general school supplies than last year

How much do you plan to shop the following categories for back to school compared to last year?



## Search demand shifts as past purchases influence Categories that are most in need by shoppers in 2021



Source: Google Consumer Surveys. Back to School. April 2021.

## Back-to-school lists are stacked with essentials.

**83%**  
**Clothing**  
Face mask  
Informal footwear  
Informal clothing  
Underwear  
Jacket

**71%**  
**Tech**  
Headphones  
Smartphone  
Laptop  
Device Charger  
Memory and Storage devices

**66%**  
**CPG**  
School supplies/  
stationery  
Cleaning supplies  
Hand Sanitizer  
Beverages  
Toiletries

**50%**  
**Equipment**  
Soft Furniture  
Sports equipment  
Furniture  
Kitchen appliances  
Beds/bedding

2021 Crowd DNA research, Back to School, commissioned by Snap Inc. V2a/b/c/d. Please let us know whether you have bought any of the following packaged goods/technological products/clothing/apparel/equipment, in the past 6 months. Please keep in mind that we are only interested in terms that were specifically bought for back to school. Base: all student (n=1070)

# How To Target Your Consumer Around BTS

EPSILON®

You can read Epsilon's full analysis [here](#).

Epsilon's CORE ID is the industry's most accurate, stable and scalable identity solution. With 200 million transaction-verified profiles founded on people-based IDs (not devices or cookies) you can connect with 2-3x more verified consumers online and offline – including those from 3rd-party data sets.

## With a Deeper Understanding, You Can Speak Each Consumer's Language

Let's say, for example, you have three potential customers in your target demographic: all female, age 35 with two kids between the ages of 6 and 10. Their household incomes are about \$120,000 and they all live in Shaker Heights, Ohio. It may be tempting to broadly target this group with a single piece of creative, but your program will drive more sales lift if you can identify exactly which individuals are most likely to buy your product, and send them a more personalized message.

When you have a best-in-class ID, you can build more robust profiles to segment more granularly, yet still have the scale to serve enough media for successful and measurable campaigns.

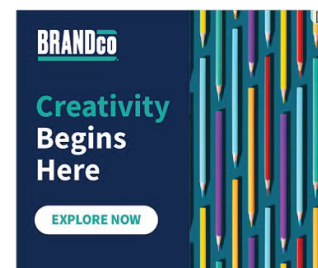
In our example, it might play out like this:



**Woman 1** - She increased spend in school supplies and lunch items in Q1 '21, indicating that her family was ramping up to get back in-person. Knowing that she's more likely than the average family to need new in-person supplies, we serve her an ad for a product bundle that includes staples like a backpack.



**Woman 2** - She is a frequent Walmart shopper (based on our Marketview data set), and she's in the IRI Proscors audience of vaccinated individuals. We know to target her with ads promoting sales at Walmart, and because vaccinated individuals are more likely to shop in-person than unvaccinated individuals, the creative should drive in-store sales. A Walmart audience of unvaccinated individuals may perform better leveraging creative with an "add to cart" or "shop online" CTA.



**Woman 3** - She recently watched a video on her iPhone about healthy school lunches, which puts her in our Epsilon audience for "interest in back-to-school content." Plus, she's in IRI's verified Returning to Brands audience because she's been decreasing her spend on private label products, which spiked during out-of-stock panic buying. Now is the right time to remind her about your values and drive brand consideration with inspiring craft ideas on your site.

# 5 Trends Sure To Land Retailers And Brand An A+ In The Back-To-School Efforts

By Amy Lanzi

*This piece originally appeared in **The Drum** on August 11, 2021.*



**On the cusp of a back-to-school season unlike any other, brands and retailers can capture more consumer dollars and expand their audiences by homing in on a few key trends – including powerful partnerships, social commerce and fluid omnichannel experiences. Amy Lanzi, executive vice-president and North America practice lead at Publicis Commerce, spells out what you need to know.**

This year's back-to-school season is unlike anything we've ever seen before. Last year was exceptionally challenging as we grappled with the onset of a global pandemic and the majority of schools offering remote or hybrid options. This year, the lead-up to back-to-school had many hoping we could go 'back to normal', with Covid-19 vaccines more readily available in the US and restrictions being loosened, but as the Delta variant looms large, we're again filled with confusion, fear and uncertainty regarding what's ahead.

Despite this uncertainty, back-to-school shopping is poised to grow this year. After a 4.6% decline in 2020, eMarketer has projected that total back-to-school sales will grow by 9.3% to reach \$95.83bn. Back-to-school spending per child is also up 9%, with the highest spending happening across preschool and college students, with increases of 32% and 13%, respectively.

As we see this resurgence of back-to-school spend, we're also seeing brands and retailers offer innovative ways for people to discover new products and complete their shopping lists. Here are a few trends we're seeing this year and how marketers can maximize the back-to-school experience:

## New Ways To Buy

Shoppers have mastered the art of omnichannel over the last 18 months. With the world feeling more comfortable with in-store shopping, there is also a need for the continued convenience of online shopping. For example, big-box and specialty retailers are offering customers the option to buy online and pick up in person near their respective colleges. This is a compelling way to fend off the e-commerce pure-plays and also allow for parental involvement for first-time dorm room decorators.



As people are testing the waters and returning to physical locations – while also maintaining steady spending across e-commerce platforms – brands need to ensure they are creating seamless shopping experiences. Most consumers toggle between online and offline during their shopping journeys, so it's critical to leverage the importance of the physical experience.

## **New Brands To Try Out**

Athleisure is out and fashion is in this fall. From head to toe, consumers are reshaping 'back to you' looks while retailers are ramping up back-to-school specials and launching new lines to position themselves as a partner in redefining shoppers' next looks. For instance, Macy's recently launched its And Now This line for young millennial and gen Z consumers.

Recent data from Snapchat suggests that among kids returning to school this fall, new clothes and a new sports season generated the most excitement. According to survey results, more than half of users plan to buy new clothes in the coming months, and "shoes, sports apparel and [sports] equipment are at the top of their shopping lists."

As more consumers are in the discovery phase, marketers using a multichannel approach will be able to easily move consumers from discovery to purchase at a time when they are in spending mode and eager to try new brands.

## **New Duos On The Scene**

Retailers are looking for new ways to steal attention and traffic from both direct-to-consumer (DTC) and other specialty retail brands during this moment. Retailers are partnering up – including Walmart and Justice and Ulta and Target, respectively – to bring in new consumers and gain their share of the back-to-school wallet.

Powerful collaborations are a strategic imperative for brands and retailers to create relevant connections and bolster their understanding of their core shopper. Plus they create opportunities to expand a brand's audiences now and moving into the holiday season. Not only are shoppers fluidly moving between online and offline, they are also easily swayed to try something new when powerful partnerships catch their attention.

## Social Commerce: Shopping Is a Team Sport

Shopping directly from social media platforms is becoming increasingly popular, particularly as e-commerce becomes the preferred method of shopping. But it isn't just shopping directly from the app that makes social media platforms so appealing during back-to-school.

Snapchat, for instance, offers a checklist that brands should review when planning their back-to-school social campaigns, including offering ways for users to share excitement about being back in school and communicate their purchases and recommendations to Snapchat friends and followers.

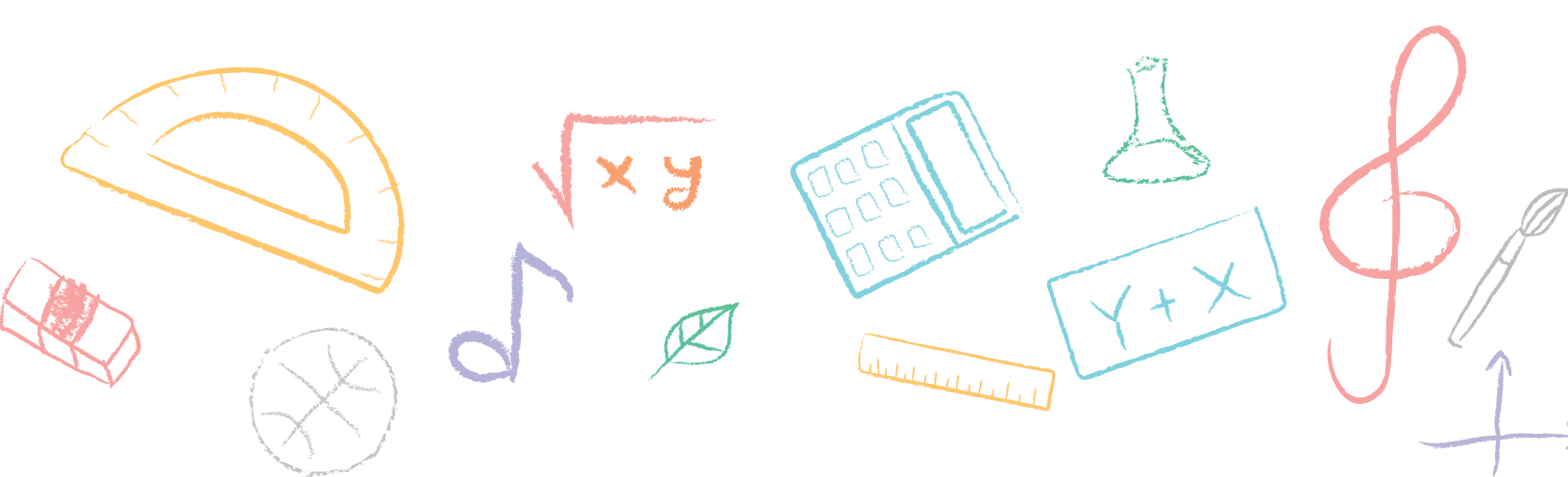
Shopping via social media is as much about creating engagement and building the brand as it is about driving conversions. Social commerce is critical to creating demand moments for today's brands.

## Capture Consumers In 'Back-To-Life' Moments

While there is still much uncertainty surrounding the coming academic year, many consumers are hoping to see the promise of 'back to life'. This promise, coupled with delayed fashion spending in 2020, is creating a dynamic back-to-school season for brands to capitalize on. Leading brands will help consumers get back to life with a surround-sound, 'omnicommerce' approach to back-to-school. Brands will need to pull all levers – commerce, community and collaboration – to recruit and retain shoppers.



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**Thank you to all our partners**

