



# BACK-TO-SCHOOL TRENDS & INSIGHTS: OFFICE & SCHOOL SUPPLIES

# Agenda

Extension of Season

Ecommerce Season & Growth

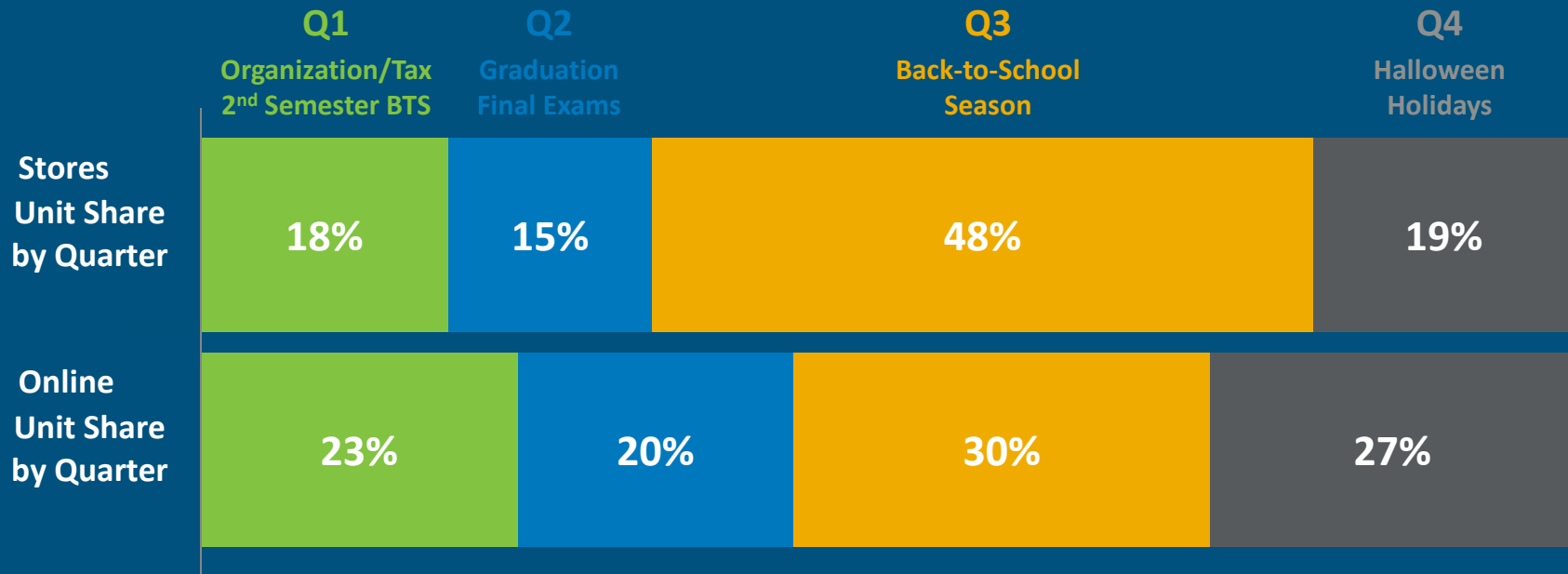
Tax Free Holidays & School Starts

Private Label Penetration

Convenience

# Back-to-School Accounts for 48% of Yearly Traditional Supplies Unit Store Sales

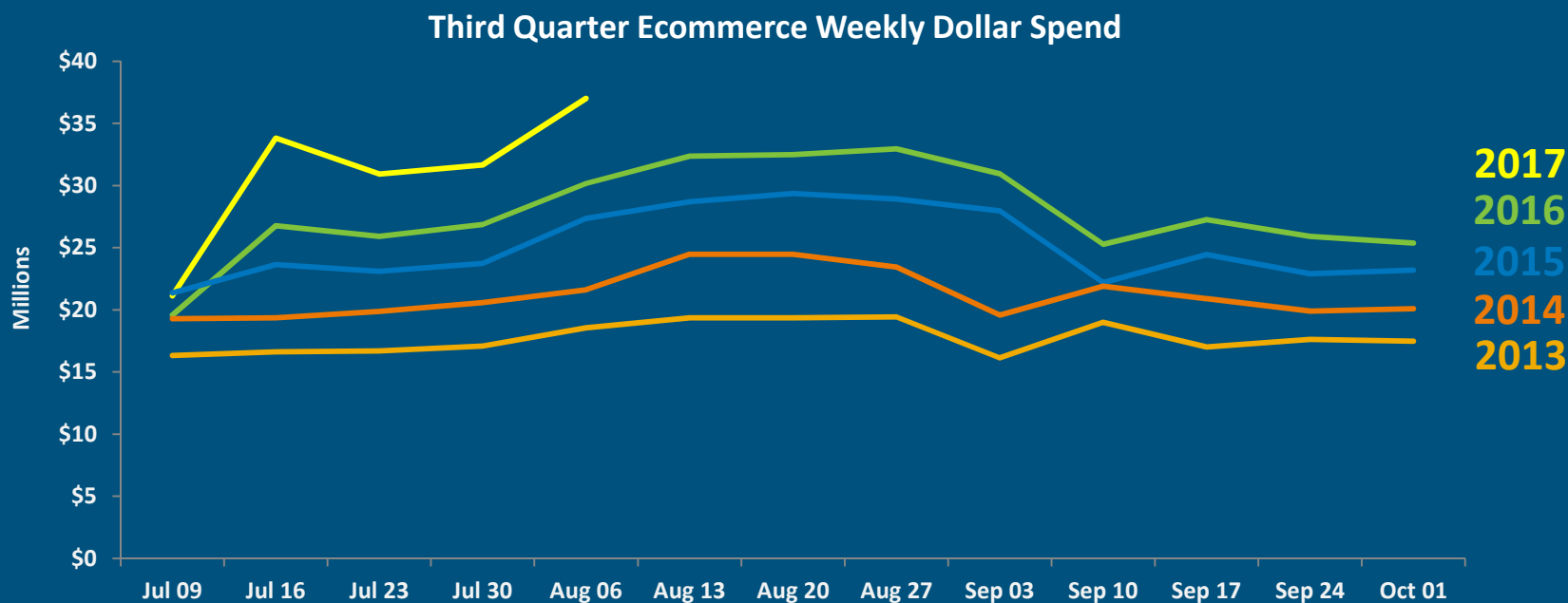
## Unit Share by Quarter – Traditional Supplies



Source: The NPD Group/ Weekly Tracking Service/52 WE January 02 2016/Excluding Janitorial and Breakroom.

# Birth Of A Season Online

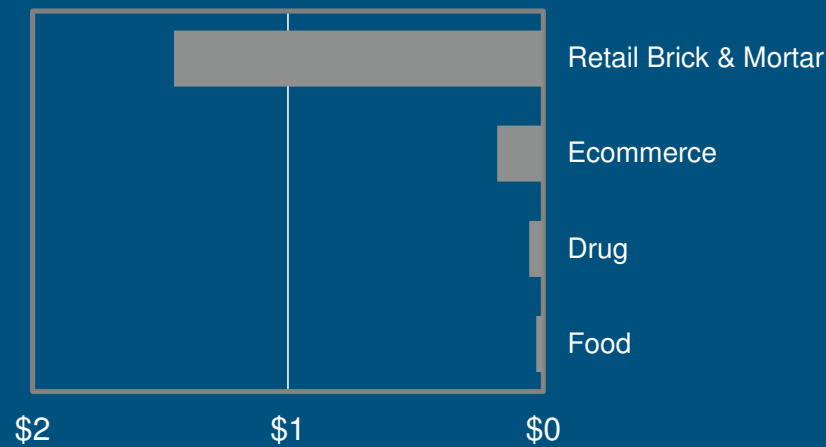
Back-to-school ecommerce spend is taking shape; a more prominent seasonal arc is forming from the first week of August and lasting through mid-September.



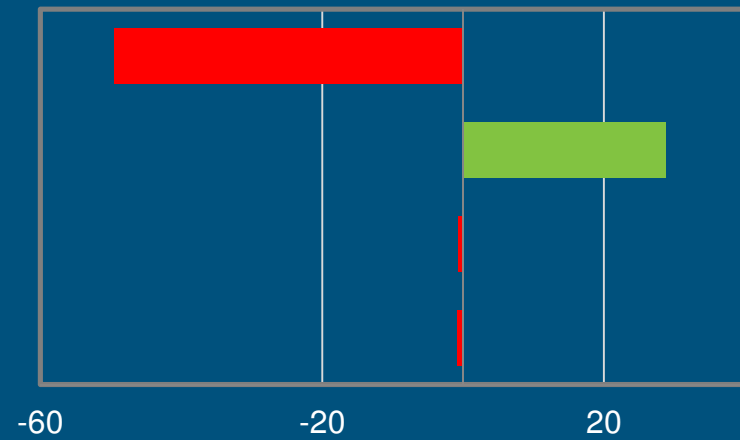
Source: The NPD Group/ Weekly Tracking Service/Excluding Janitorial and Breakroom.

# Back-To-School Season to Date Channel Dollar Spend

For six weeks end August 5, \$1.7B has been generated in Office Supplies, down -1.3% vs PY. As season progresses clear distinction between Brick & Mortar and Ecommerce trends continue.



2017 BTS Season to Date Dollar Sales (\$B)



2017 Season to Date Growth (\$MM)

Source: The NPD Group/ Weekly Tracking Service/Excluding Janitorial and Breakroom/ 4WE July 22 2017

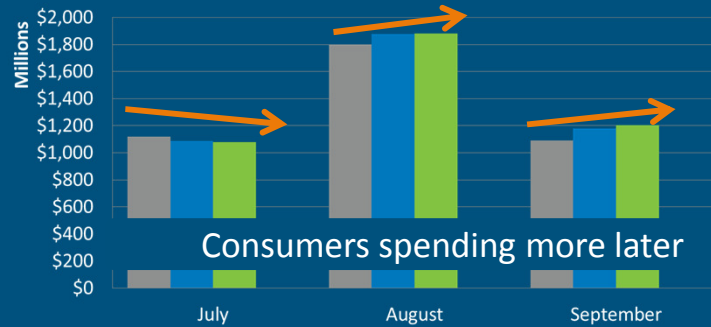
# Back-To-School Season Retail Dollar Sales

2014

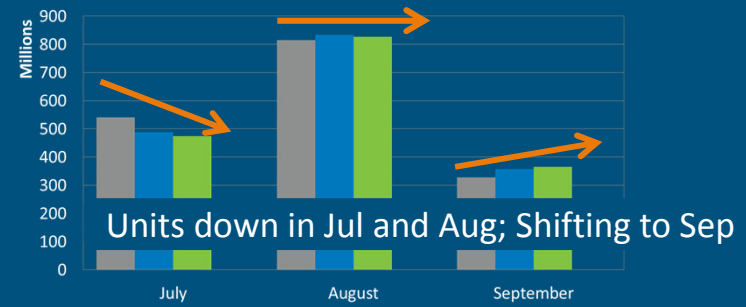
2015

2016

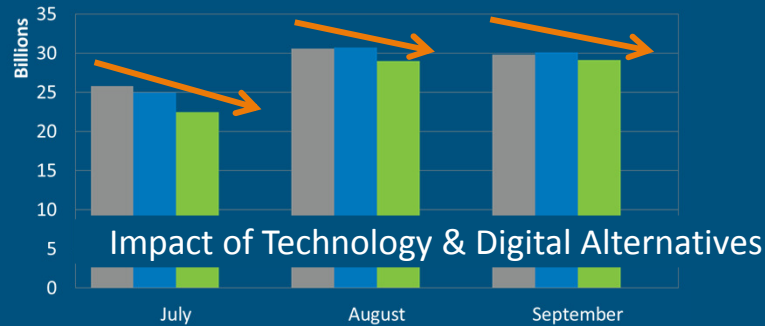
## Dollars



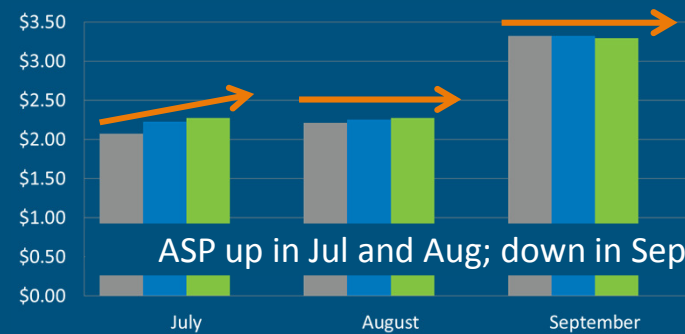
## Units



## Actual Units



## ASP

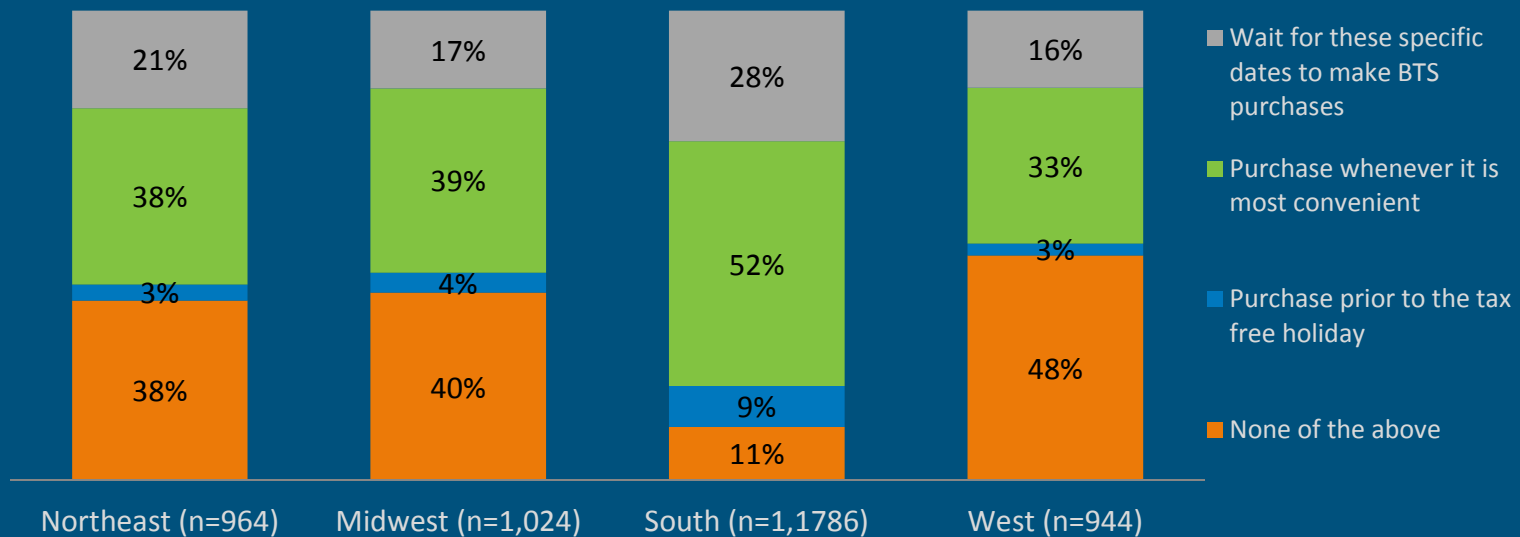


Source: The NPD Group/ Weekly Tracking Service/13WE Sep 2016/Excluding Janitorial and Breakroom.

# The South Most Impacted by Tax-Free Incentives

Those who live in the South are significantly more likely than their counterparts to shop on tax free shopping weeks when shopping for BTS, driven by fact that majority of states in this region offer tax-free shopping.

% Who Purchase During Tax Free Shopping Weeks

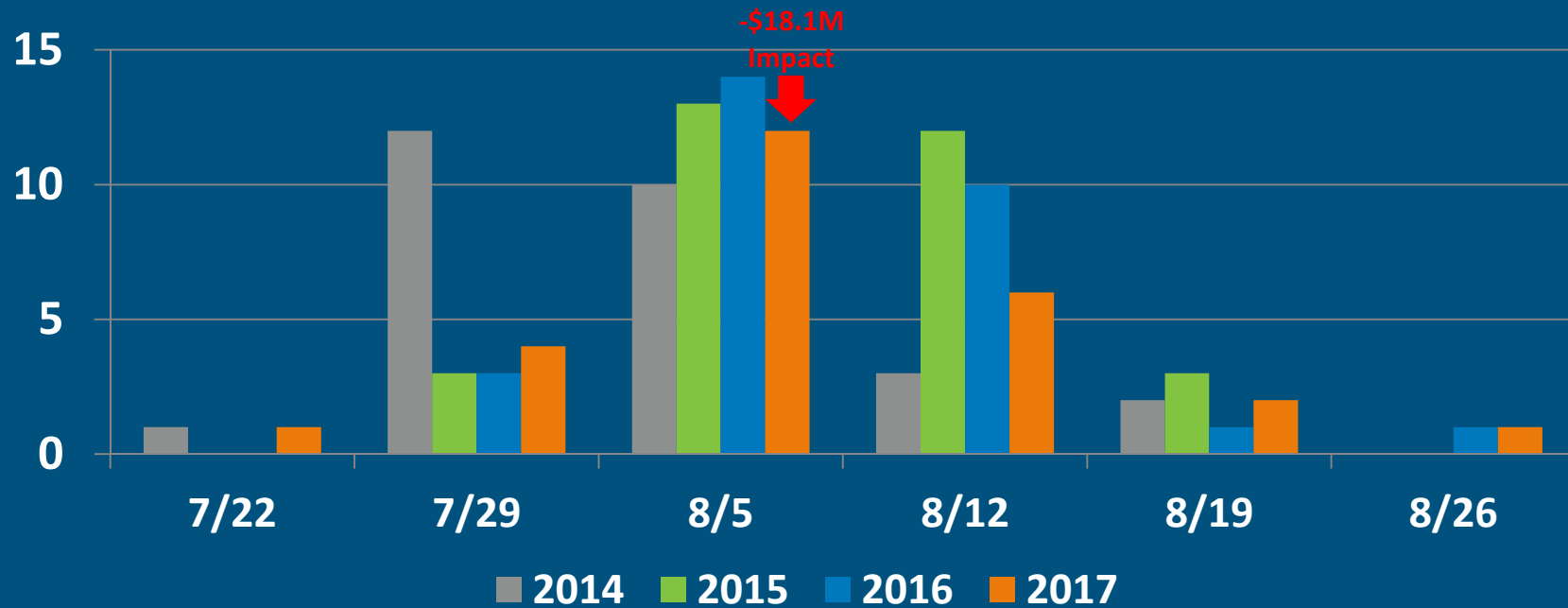


Q. Which one of the following statements best describes you as it relates to back-to-school shopping?

Source: The NPD Group/ LAB Series: Back to School May 2017

# Back-To-School Tax Free Dates Shifting & Decreasing

2017 date shifts for Alabama (earlier) and Texas (later). Ecommerce sites can comply with tax-free offerings.

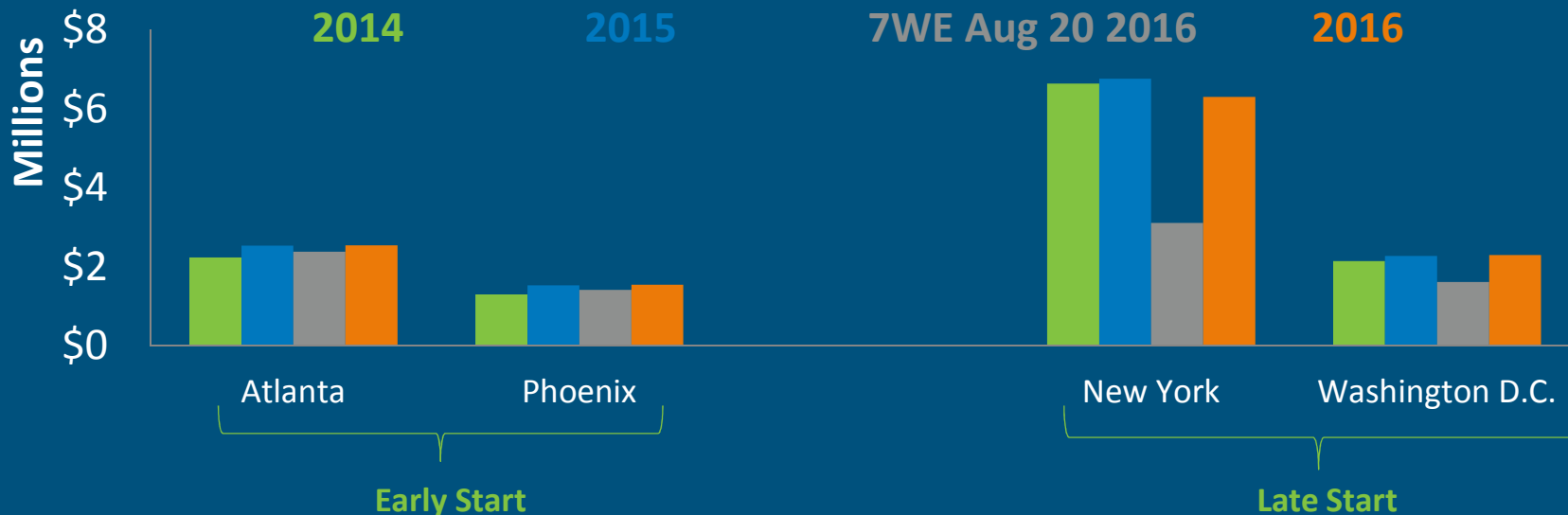




# Early and Late School Start DMA Differences

Early and late school starts influence when consumers are purchasing supplies and can drive total industry sales trends.

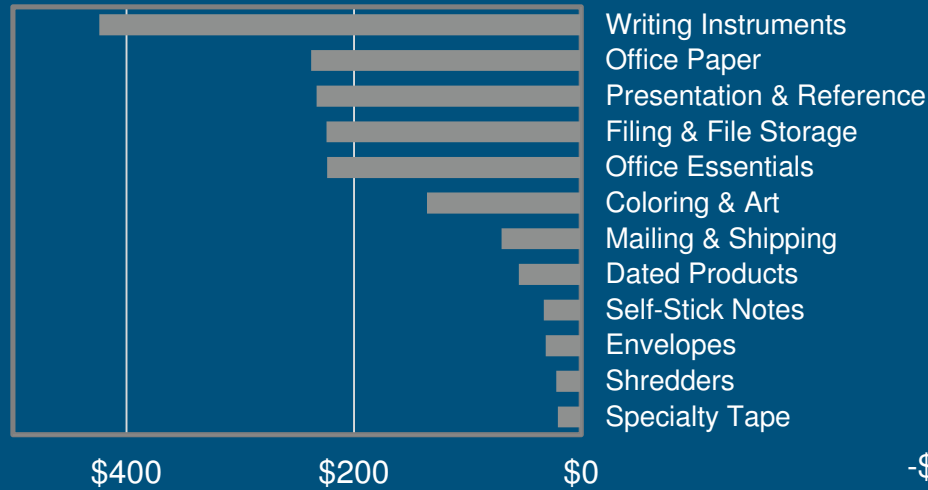
### Encased Pencil Store Sales by an Early & Late Start DMA



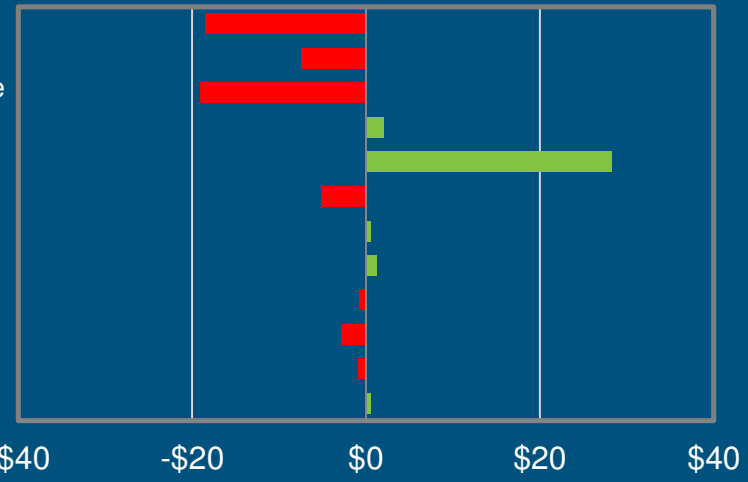
Source: The NPD Group/ Weekly Tracking Service/Excluding Janitorial and Breakroom

# Back-To-School Season Category Dollar Spend

Writing, coloring/art, and office essentials did not grow at the same level in 2016 as 2015. 2017 Season to Date office essentials driving growth, colored pencils in decline.



2017 BTS Season to Date Dollar Sales (\$MM)

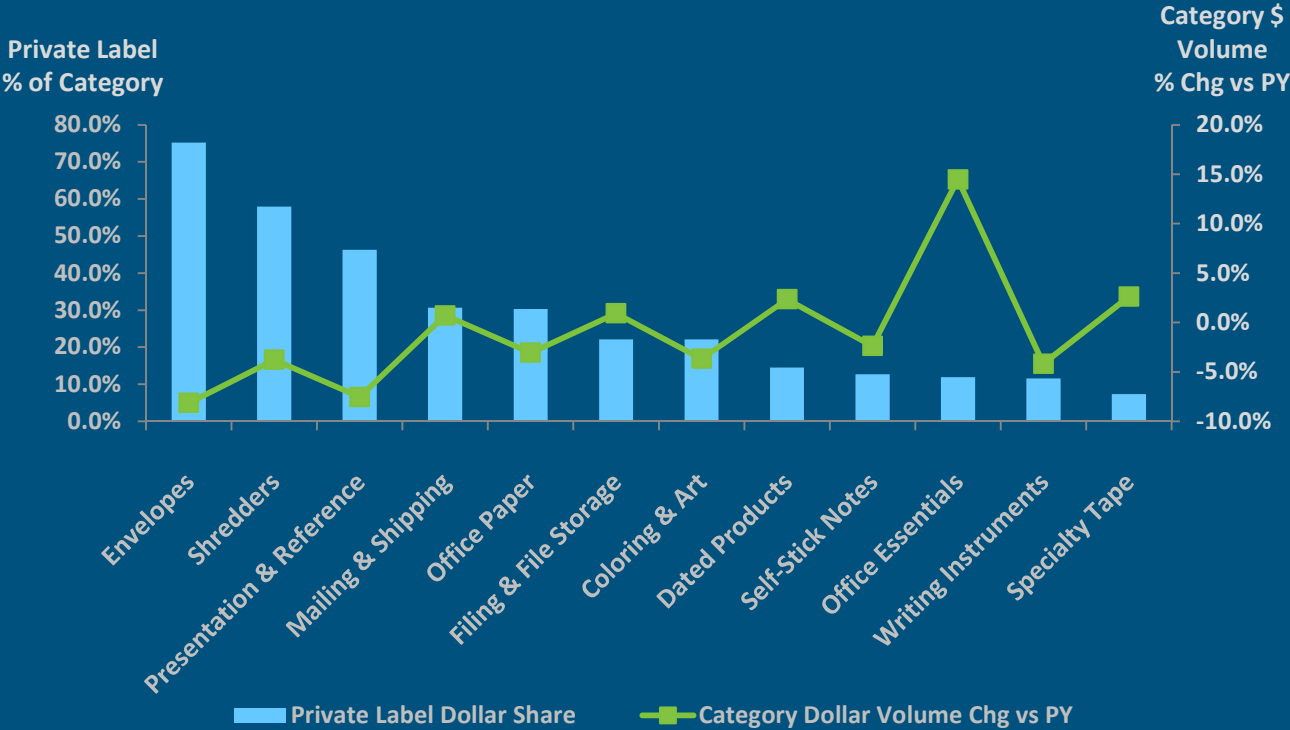


2017 Season to Date Growth (\$MM)

Source: The NPD Group/ Weekly Tracking Service/Excluding Janitorial and Breakroom/ 6 WE Aug 5 2017

# Less Private Label in Higher Growth Categories

Categories with the strongest growth tend to have less penetration of Private Label products.



Source: The NPD Group/ Weekly Tracking Service/Excluding Janitorial and Breakroom/ 6 WE Aug 5 2017

# Consumers Are Seeking Convenience...



**Back to  
School Kits**



**Online List  
Fulfillment**



**...but what  
about  
impulse?**

# Thank you

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