



Back-to-School Insights



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Class is back in session

The Back-to-School opportunity.

The Back-to-School season always arrives faster than expected, and this year will be no different. As parents and students prepare for the upcoming academic year, it's essential to be ready to connect with shoppers during this key retail moment.

Canada's Back-to-School season represents a \$4 billion dollar retail opportunity. With the average spend per child averaging anywhere between \$600–\$750 and most anticipating to shop 2–3 times to complete their shopping lists, there's no shortage of opportunities to engage with shoppers.¹

75%

of Canadian parents said that they planned to spend the same or more for Back to School ahead of last year's season²

79%

of those shopping for Back to School expect to buy items online¹

99%

of those shopping for Back to School expect to buy items in-store¹

¹ Caddle & RCC, Back-to-School Shopper Journey 2025, May 2025.

² Field Agent, Back to School 2025 Canadian Shopper Insights, August 2025.

Walmart plays a key role for Back-to-School shoppers

Back to School shoppers are turning to mass merchandise retailers to check off items on their lists, with price remaining a top consideration. Over half of shoppers say that finding good prices and deals is a challenge, and more than one third say staying on budget is difficult.¹

54%

of Back-to-School shoppers said they plan to do most of their shopping at mass retailers like Walmart¹

94%

of shoppers shared that they were likely to visit Walmart in person to purchase school supplies²

¹Caddle & RCC, Back-to-School Shopper Journey 2025, May 2025.

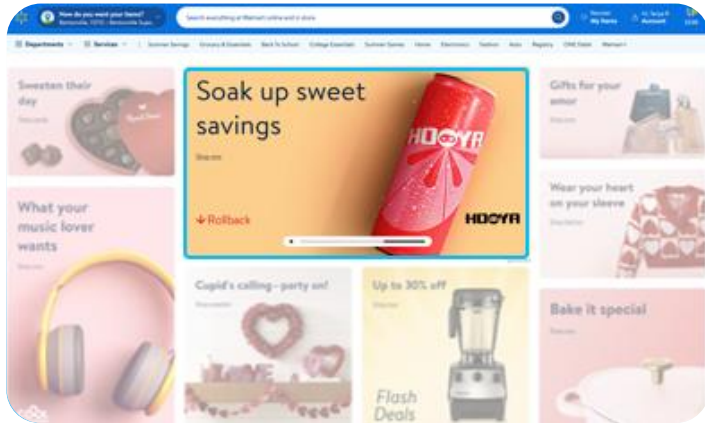
²Field Agent, Back to School 2025 Canadian Shopper Insights, August 2025.





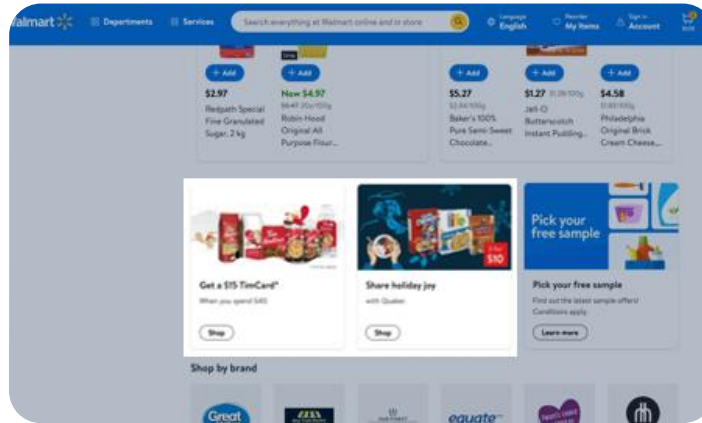
Your Back-to-School checklist

Front-and-centre impact



Stand out across online channels with a high-impact **Category Hero Banner** or **Homepage Feature Tile** to showcase your brand as shoppers explore categories online.

Influence spend through discovery



As shoppers seek inspiration, leverage onsite placements to capture their attention and guide purchase decisions. Use **Sponsored Search** and **Onsite Display** to keep your brand front and center throughout the Back-to-School season.

Reach shoppers in store



Capture shoppers' attention in stores with impactful in-store placements like **Blades**, **Wobblers**, and **Shrouds**. With shoppers checking items off their list throughout the summer months, ensure your brand is visible from the start of the season right until the end to capture attention and drive consideration.



School Supplies



The Walmart School Supplies shopper

Back-to-School

- School Supplies saw **growth both in-store and online** last year. In-store saw moderate, single-digit growth year over year, while online saw double-digit growth.
- The **majority of the growth activity is seen in July for online, while in-store sees the most growth in August**, likely due to a more immediate need for purchases ahead of the first day of classes.
- Across channels, the **average order values are nearly on par**, separated by roughly 5%, with online seeing the slightly elevated AOV.
- 98% of school supplies shoppers online are repeat customers.
- These trends **signal a need for a true omnichannel approach** to capture the attention — and spend — of Back-to-School shoppers in this category.

Top in-store categories by sales

- | | |
|---------------|----------------------|
| 1. Backpacks | 6. Computer paper |
| 2. Pens | 7. Markers |
| 3. Notebooks | 8. Calculator |
| 4. Pencils | 9. Binders |
| 5. Lunch bags | 10. Coloured pencils |

Top online categories by sales

- | | |
|---------------------|----------------------|
| 1. Markers | 6. Pens |
| 2. Computer paper | 7. Glue |
| 3. Coloured pencils | 8. Dry erase markers |
| 4. Notebooks | 9. Backpacks |
| 5. Pencils | 10. Binders |

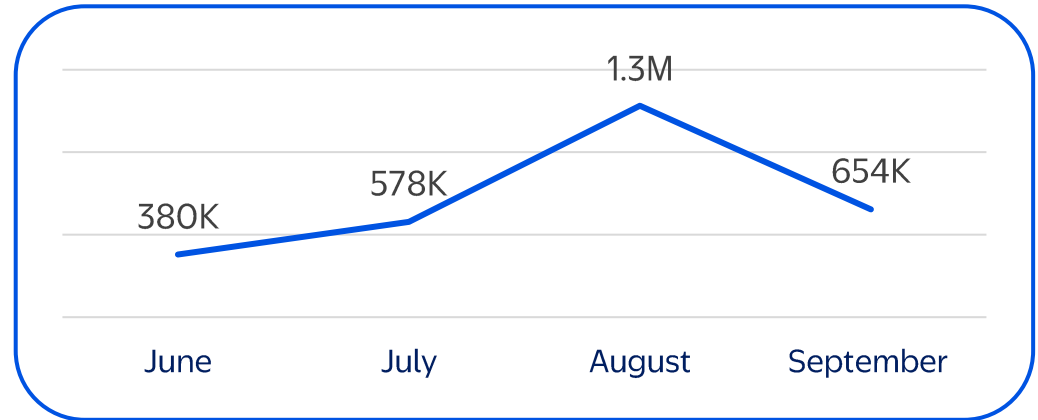


School Supplies searches and page visits

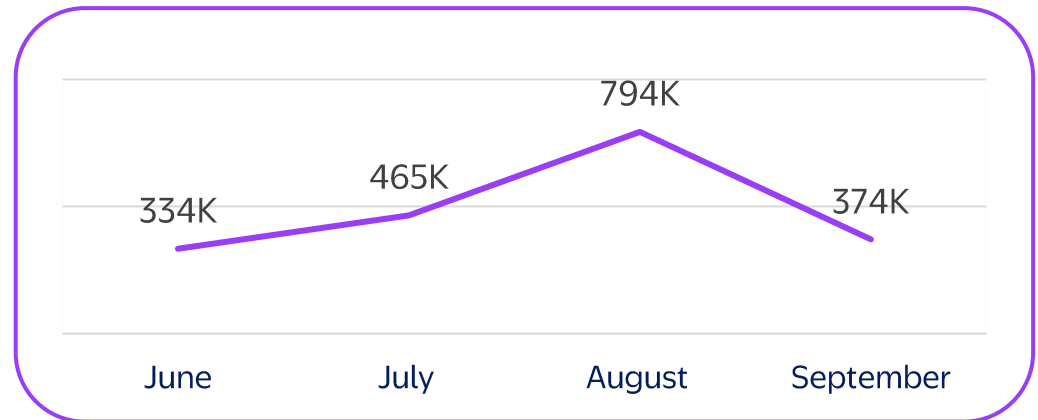
Back-to-School

- Both **search and page visit activity peak in August** as the first day of school quickly approaches. **Search remains elevated into September**, likely to represent those both researching and purchasing for last minute needs once children are back in class.
- From June to September, the category saw **roughly 2.9M total searches**, averaging roughly 6K per day, and a total of **1.3M unique visitors**.

School Supplies searches June – September 2025



School Supplies visits June – September 2025



Q Top Search Terms

- | | |
|-------------|-------------------|
| Binders | School bag |
| Highlighter | Duotang |
| Notebook | Pens |
| Calculator | Backpack for kids |
| Eraser | Sac à dos |

Walmart first-party data, June – September 2025.

Eye-catching ways to capture Back-to-School shoppers

Stay visible with a strong omnichannel approach to engage with shoppers, drive consideration, and boost sales.

Engage in-store shoppers



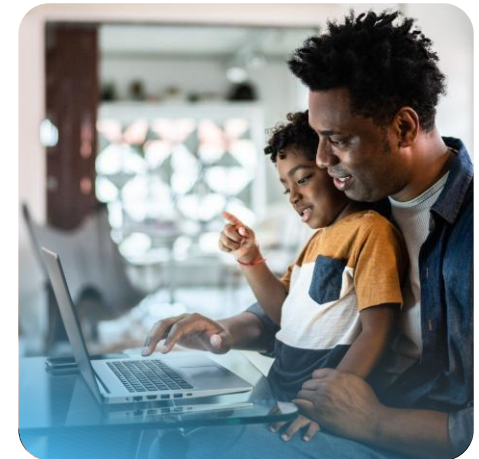
Take advantage of signage opportunities to engage with shoppers at the shelf, while they're making purchase decisions. With placements such as **Blades**, **Wobblers**, and **Side Gables** you can showcase your brand and products across stores to connect with shoppers.

Connect with online shoppers



Sponsored Search brings visibility to your brand and products, ensuring you're capturing attention as shoppers browse. Ensure your search placements start early, in May or June, and carry throughout the Back-to-School shopping season. Keep in mind that many in-store shoppers will research online too!

Stand out from the crowd



Own the category with **Category Takeover** placements on relevant pages, capturing shoppers as they browse across our site and app. Drive awareness and consideration by being visible throughout the shopping journey — from exploratory scroll to time of purchases — during this key shopping season.



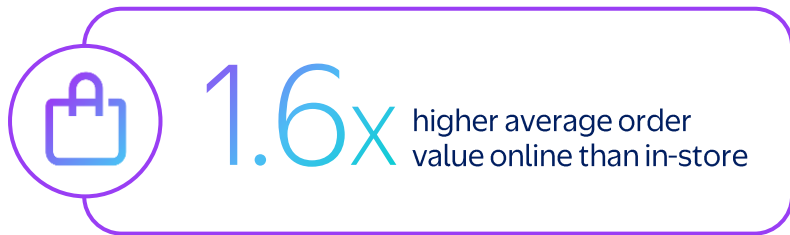
Apparel



The Walmart Apparel shopper

Back-to-School

- The Apparel category saw slight **sales growth across both in-store and online channels** last year.
- Those shopping online are **nearly all returning shoppers**, signaling Walmart is **a trusted destination** for those shopping for their Back-to-School clothing needs.
- The **category sees the bulk of activity in July**, followed by August both in-store and online, meaning early visibility is key to connect with shoppers as they research, browse, and ultimately choose to buy.



Top in-store categories by sales

- | | |
|----------------------------------|-----------------------|
| 1. Knit Tops (boys & girls) | 6. Boys' active tops |
| 2. No Boundaries athleisure* | 7. Boys' shorts |
| 3. Active bottoms (boys & girls) | 8. Girls' sleep sets |
| 4. Dresses | 9. Girls' active tops |
| 5. Boys' sleep sets | 10. Girls' leggings |

Top online categories by sales

- | | |
|-----------------------|------------------------------|
| 1. Girls' brief | 6. Boys' crew socks |
| 2. Boys' boxer briefs | 7. No Boundaries athleisure* |
| 3. Girls' leggings | 8. Boys' briefs |
| 4. Boys' sleep sets | 9. Boys' active bottoms |
| 5. Boys' knit tops | 10. Girls' sleep sets |

*Branded term



Apparel searches and page visits

Back-to-School

- **Activity across our online channels peaks in August**, dropping a bit in September, though still seeing elevated visits and searches when compared to the beginning of summer.
- With elevated activity seen in June, it's important to **be visible early** to capture those who are starting to browse and research amongst the category.
- From June to September, the category saw **roughly 2.8M total searches**, averaging around 6K per day, and a total of **1.3M unique visitors**.

Q Top Search Terms

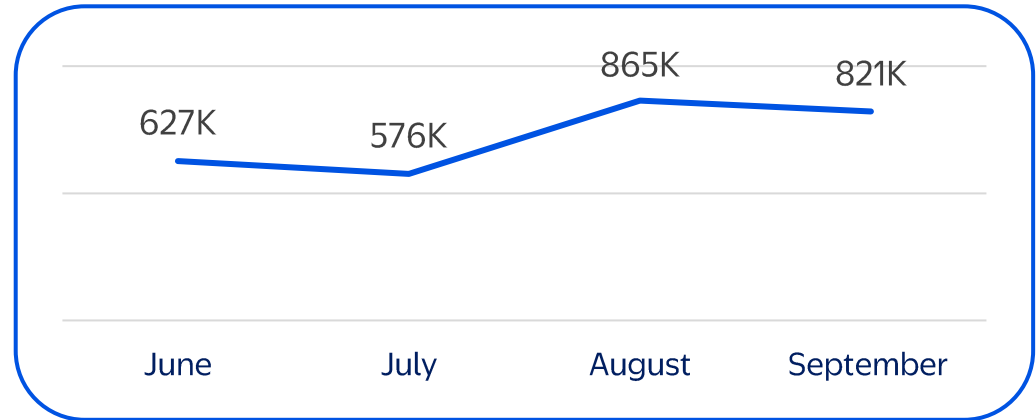
- Lilo and Stitch*
- Minecraft*
- Boys' shoes
- Justice*
- Girls' clothing George 4-16*

- Toddler shoes
- Shoes for girls
- Fortnite*
- Super Mario*

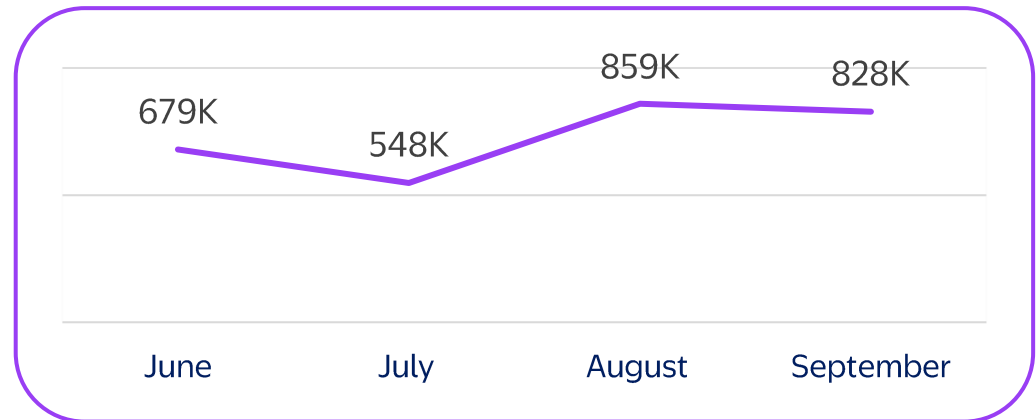
*Branded term

Walmart first-party data, June – September 2025.

Apparel searches June – September 2025



Apparel visits June – September 2025



Eye-catching ways to capture attention in the clothing category

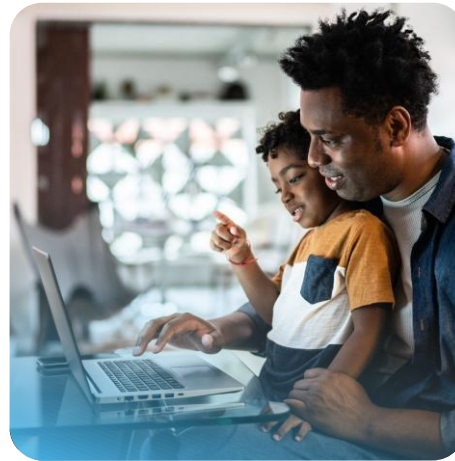
Stay visible with a strong omnichannel approach to engage with shoppers, drive consideration, and boost sales.

Stand out from the digital crowd



Reach in-market customers as they actively browse the apparel category online using a **Category Takeover** to extend your reach with contextually relevant placements. Highlight the items you know Back-to-School shoppers are looking for to increase visibility and boost consideration.

Capture attention at every shopping stage



Leverage **Sponsored Search** and **Onsite Display** to build awareness and capture shoppers as they are actively researching, discovering, and buying their Back-to-School clothing and accessories.

Engage in-store shoppers



Connect with shoppers as they browse our stores through exclusive apparel signage. Leverage impactful placements — such as **Apparel Tags, Apparel Toppers, or Blades** — to highlight your brand and products directly where purchase decisions happen.



Electronics



The Walmart Electronics shopper

Back-to-School

- The **category remained consistent year over year**, seeing minimal shifts in sales growth during the Back-to-School season.
- **July through September are key months for the online channel**, where year-over-year double-digit sales growth was seen.
In-store, activity is at its peak in July when looking at sales year over year.
- The category sees very **strong loyalty, with 99.4% being repeat customers**, marking Walmart as a tried, true, and trusted shopping destination.
- Subcategories are similar across channels — an **omnichannel strategy will be key to capture shoppers at every stage of the shopping journey** both in-store and online.



Walmart first-party data, June – September 2025.

PROPRIETARY AND CONFIDENTIAL

Top in-store categories by sales

- | | |
|-----------------------|--------------------------------|
| 1. Ink | 6. Tablets |
| 2. Apple iPad* | 7. Portable audio |
| 3. True Wireless | 8. Apple headphones* |
| 4. Laptop | 9. Printers |
| 5. Office Accessories | 10. Apple wearable technology* |

Top online categories by sales

- | | |
|-------------------------------|------------------------------|
| 1. Apple iPad* | 6. True Wireless |
| 2. Apple wearable technology* | 7. Apple tablet accessories* |
| 3. Apple headphones* | 8. LCD monitors |
| 4. Ink | 9. Office Accessories |
| 5. Printers | 10. Portable audio |

*Branded term



Electronics searches and page visits

Back-to-School

- Both search and page visits begin to **climb heading into July, reaching a peak in August**, and resuming similar levels to pre-Back-to-School shopping season in September.
- With elevated activity seen in June, it's important to **be visible early** to capture those who are starting to browse and research amongst the category.
- From June to September, the category saw **roughly 5.4M total searches**, averaging approximately 12K per day, and a total of **roughly 2.5K unique visitors**.

Q Top Search Terms

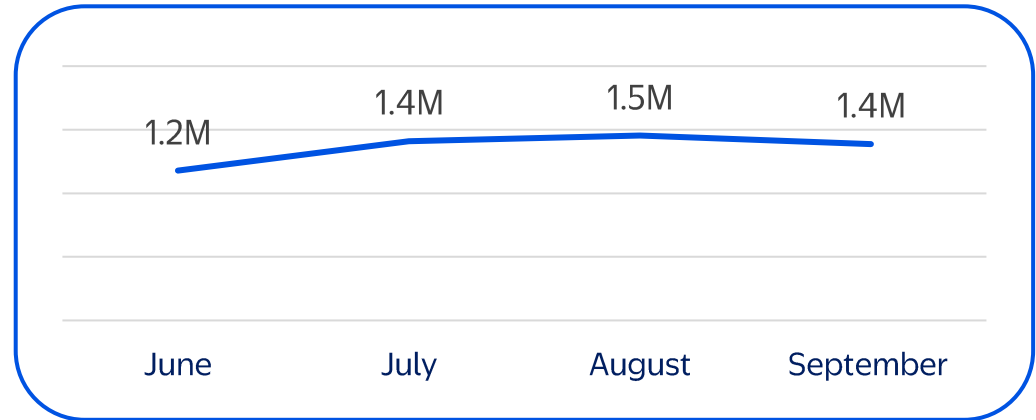
- | | |
|---------------|------------|
| AirPod Pro 2* | Earbuds |
| iPad* | Tablet |
| iPad Air* | Headphones |
| Smart watch | Monitor |
| Apple watch* | Chromebook |

*Branded term

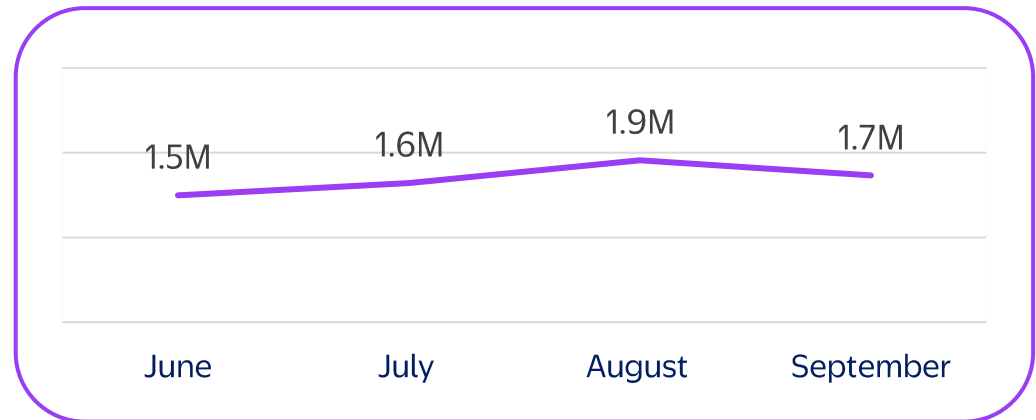
Walmart first-party data, June – September 2025.

PROPRIETARY AND CONFIDENTIAL

Electronics searches June – September 2025



Electronics visits June – September 2025

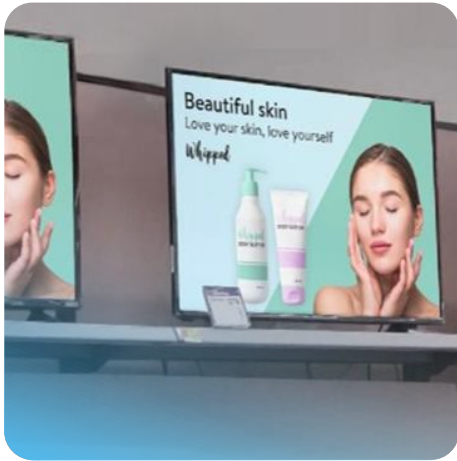


Approximate values

Strategic placements to capture attention

Stay visible with a strong omnichannel approach to engage with shoppers, drive consideration, and boost sales.

Engage in-store shoppers



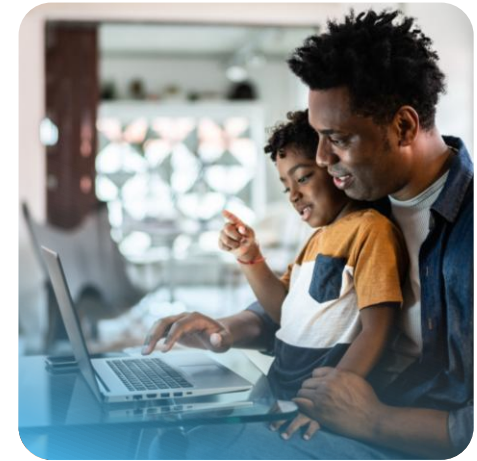
Draw shoppers in with content on **TV Walls**. This cinematic advertising platform uses high-quality video content and eye-catching animations to create memorable brand presence and influence purchasing decisions as shoppers explore products in-store.

Seasonal placements that resonate



With seasonality influencing shopper activity, leverage our **Back-to-School Digest** to showcase your brand and drive awareness and conversions. With various placement sizes and seasonal context baked in, this can be a great opportunity for your brand to show up differently.

Capture attention at the discovery phase



Sponsored Search and **Onsite Display** can capture the attention of shoppers as they search. Explore opportunities to upsell with accessories and add-ons or look to influence purchase decisions by strategically positioning your electronics products.



Grocery





The Walmart Grocery shopper

Back-to-School

- The category continues to be a **dependable Back-to-School destination** for shoppers, with **steady year-over-year sales growth**, driven by particularly strong online performance.
- Momentum builds through the core Back-to-School months of July and August both online and in-store, reinforcing the **importance of early visibility as routines take shape and pantry stocking begins**.
- Shoppers are returning to this category at a high rate — nearly 99% — highlighting an opportunity to reinforce habitual, high-frequency purchasing that will last through the year.
- With similar subcategories across in-store and online channels, an **omnichannel strategy will be key to capture shoppers at every stage of the shopping journey**.



Walmart first-party data, June – September 2025.

PROPRIETARY AND CONFIDENTIAL

Top in-store categories by sales

- | | |
|-------------------------|------------------------|
| 1. Canned soft drinks | 6. Water |
| 2. Potato chips | 7. Bottled soft drinks |
| 3. Crackers | 8. Isotonics |
| 4. Cookies | 9. Tortilla chips |
| 5. Pizza & pizza snacks | 10. Juice |

Top online categories by sales

- | | |
|-------------------------|------------------------|
| 1. Canned soft drinks | 6. Tortilla chips |
| 2. Pizza & pizza snacks | 7. Bottled soft drinks |
| 3. Crackers | 8. Water |
| 4. Cookies | 9. Isotonics |
| 5. Potato chips | 10. Sparkling water |

*Branded term

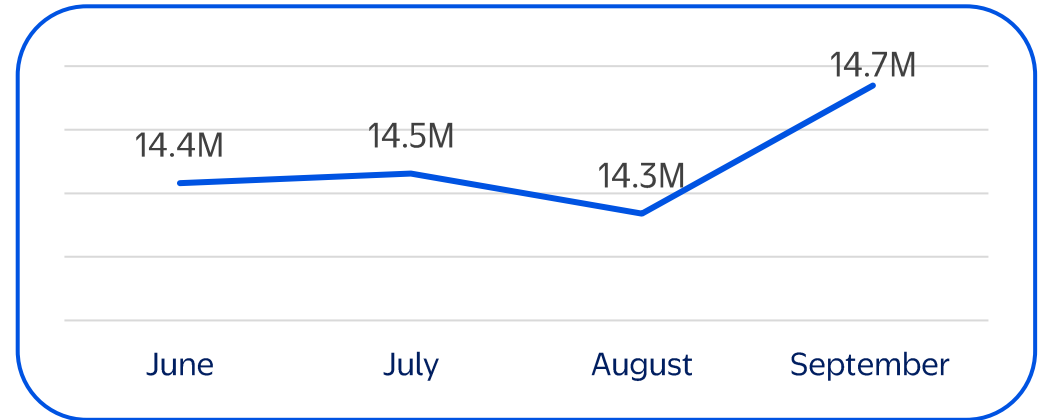


Grocery searches and page visits

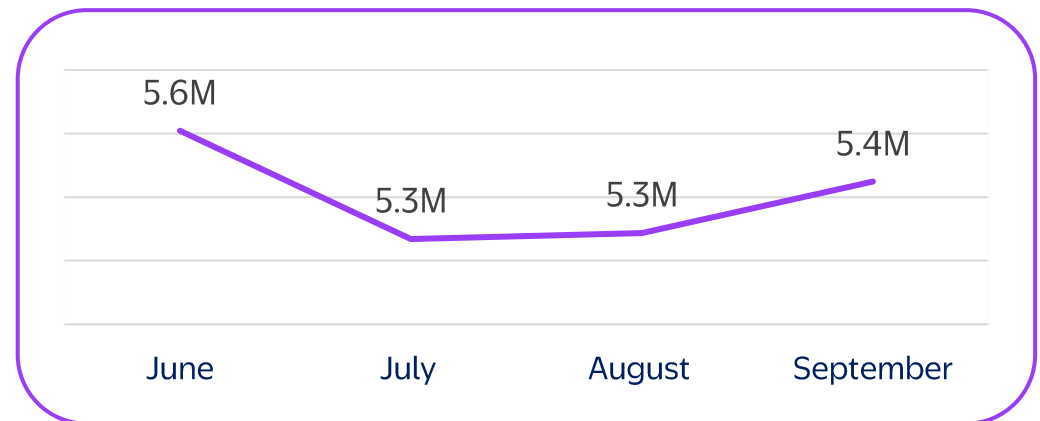
Back-to-School

- **Search** sees consistent activity in June and July, with a dip occurring in August. **Come September, we see increased search activity** in the category, likely reflecting the beginning of classes and the **more immediate need to stock up on essentials**.
- Page visits soften over the summer as routines fluctuate, then **pick up in late August and September as back-to-school brings structure back**.
- From June to September, the category saw approximately **58M total searches**, averaging roughly 129K per day, and a total of **roughly 26.3K unique visitors**.

Grocery searches June – September 2025



Grocery visits June – September 2025



Q Top Search Terms

- | | |
|----------------------------|--------------|
| Doritos* | Popcorn |
| Frozen vegetables | Fries |
| Chocolate bars & chocolate | Cookies |
| Frozen fruit | Pizza |
| Salsa | Granola bars |

*Branded term

Walmart first-party data, June – September 2025.

Strategic placements to capture attention

With 95% of Back-to-School shoppers saying that they plan to have their children eat packed lunches and snacks from home, ensure you're connecting with customers across channels to influence purchase decisions.

Engage in-store shoppers



As shoppers explore aisles, **Blades** and **Wobblers** can drive awareness and consideration for your brand, capturing the attention of those hunting for items to fill lunch boxes this Back-to-School season.

Be visible during scroll



Onsite Display placements target shoppers across the funnel to help you build brand loyalty, promote products, gain incremental revenue, and boost sales.

Create an experience



Designed to engage shoppers at the point of purchase, **In-store Sampling** delivers impactful experiences that allow shoppers to discover your product in real time. Craft an experience that shows shoppers how your products fit into their Back-to-School routines to drive trial and adoption.

¹Field Agent, Back to School 2025 Canadian Shopper Insights, August 2025.



Home



The Walmart Home shopper

Back-to-School

- Back-to-School season brings dorm refreshes and new apartment needs. The Home category experienced **steady demand as shoppers relied on Walmart for their home and dorm essentials** during this key season.
- **July and August are key months for the category.** In-store sees the most growth in August, where online activity centred on July — these **shoppers are planning ahead and gathering their essentials throughout the summer months.**
- Subcategories are similar across channels, with bedding being top of mind amongst our shoppers. **Consider ways to drive larger, bundled purchases** in the bedding department through strategic placements and messaging or tapping into their other needs to **drive shoppers across aisles.**



Walmart first-party data, June – September 2025.

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Top in-store categories by sales

- | | |
|-----------------------|----------------------------|
| 1. Sheets | 6. Comforter sets |
| 2. Bedding protection | 7. Multipiece bedding sets |
| 3. Pillows | 8. Premium foam |
| 4. Towels | 9. Mattress |
| 5. Accent rugs & mats | 10. Bath rugs |

Top online categories by sales

- | | |
|----------------------------|------------------------------|
| 1. Multipiece bedding sets | 6. Folding tables |
| 2. Pillows | 7. Scents |
| 3. Bedding protection | 8. Office chairs |
| 4. Mattress | 9. Sheets |
| 5. Futons & sofa beds | 10. Bookcases & cube storage |



Home searches and page visits

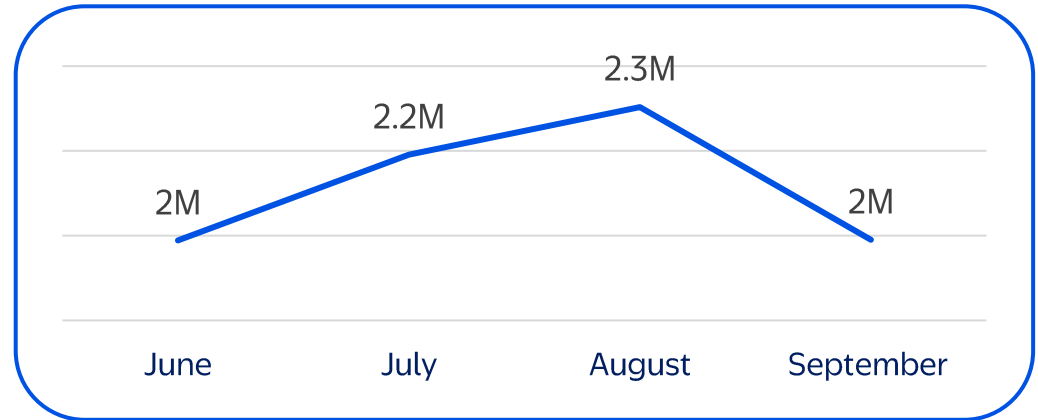
Back-to-School

- **Search activity** only increases as the Back-to-School season gets underway, **peaking in August** and returning to pre-season levels come September. **Page visits experience a similar August peak in activity**, though a slower, more consistent June and July.
- To ensure you're engaging with shoppers throughout the season and at every point of their shopping journey, **ensure your online tactics start early in the season.**
- From June to September, the category saw approximately **8.4M total searches**, averaging roughly 19K per day, and a total of **roughly 3.9M unique visitors.**

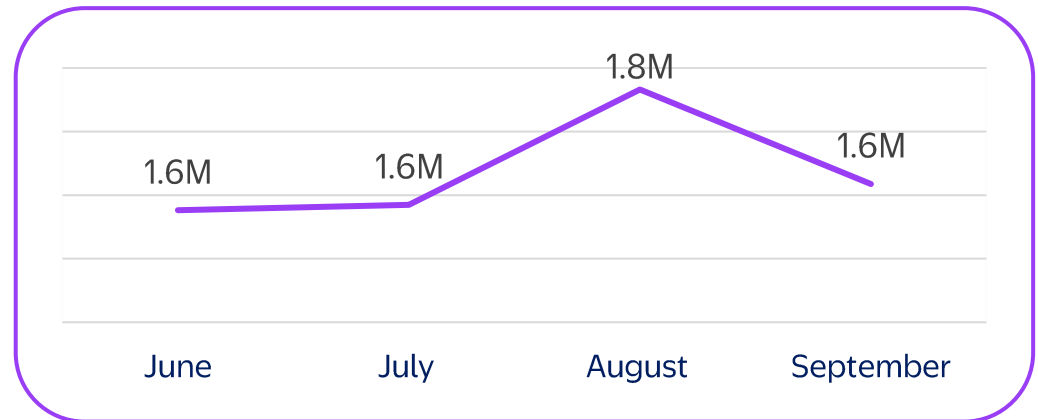
Q Top Search Terms

- | | |
|----------------|-------------|
| Comforter | Bed sheets |
| Towels | Pillow |
| Blanket | Garbage bin |
| Laundry basket | Hangers |
| Bath mat | Shoe rack |

Home searches June – September 2025



Home visits June – September 2025



Walmart first-party data, June – September 2025.



Strategic placements to capture attention

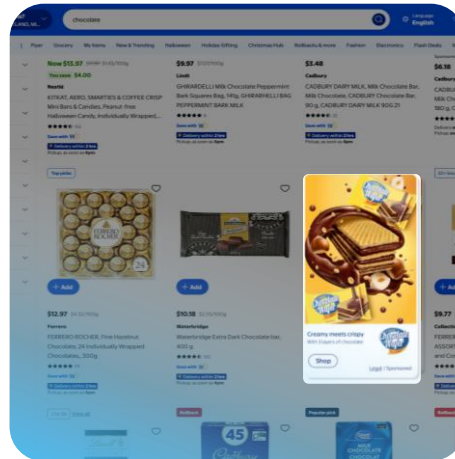
Stay visible with a strong omnichannel approach to engage with shoppers, drive consideration, and boost sales.

Connect with online shoppers



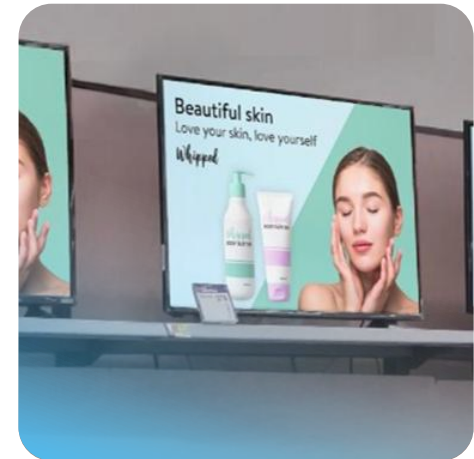
Capture shoppers as they search by using **Sponsored Search** to stand out online and meet shoppers where they are in their shopping journey, whether it be researching, browsing, or making their purchase decisions.

Increase your online presence



Onsite Display placements across our site and app can help increase visibility to drive consideration and boost sales throughout this key shopping period.

Reach in-store shoppers



Draw shoppers in with content on **TV Walls**. This cinematic advertising platform uses high-quality video content and eye-catching animations to create memorable brand presence and influence purchasing decisions.



Let's spark sales.