



Class is back in session at Walmart!

Check off those lists and help shoppers fill their backpacks this Back-to-School season with our A+ blend of awareness and precision your brand needs to stand out.

Walmart Connect has the right mix of capabilities and the omnichannel presence to help brands connect meaningfully with shoppers during this key moment. Let's get studying as we share our insights and best practices for the start of the school year.

FY26
Back-to-School





2025 Back-to-School is projected to reach

\$6.2 Billion in revenue¹



Walmart is the #1 omnichannel retailer for BTS!³

70% of respondents planned to do their Back-to-School shopping both in-store and online²

Up from \$5.9 billion in 2024, revenue is expected to continue at a **5.9%** CAGR through 2030, led by large segments like clothing and fast-growing segments like electronics.¹

¹ Canada Back To School Market Size & Outlook, 2024-2030. Grand View Research, 2024

² 2024 Deloitte Back-to-School Survey. Deloitte, May 2024

³ Household Penetration Nielsen/Q Homescan, 2024





Canadians choose Walmart for Back-to-School shopping



Mindful spending is the key to success

Over 7 in 10 Canadians planned to take advantage of in-store or online discounts, promotions, and sales to keep expenses in check.⁴



Canadians have come to appreciate the everyday low prices they rely on at Walmart, along with the added bonus of seasonal rollbacks.

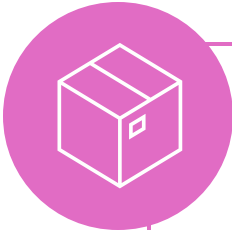


Rising costs challenge brand loyalty

Over 6 in 10 shoppers said they'd buy a different brand if their preferred brand was too expensive.⁴



Over 90% of searches in key Back-to-School categories are generic, giving advertisers the opportunity to defend or grow their brand.⁶



Convenience is king

7 in 10 shoppers said that convenient locations, returns, and delivery are the top drivers for choosing where to shop.⁵



Walmart offers over 400 store locations so they can shop whenever or wherever they choose. **Walmart Canada's Delivery Pass** offers customers access to unlimited, free same-day delivery on thousands of items for less than \$2 per week!⁶

⁴ Back-to-School 2024: More Expensive than ever? Abacus Data, August 2024

⁵ 2024 Deloitte Back-to-School Survey. Deloitte, May 2024

⁶ Walmart 1P data from Jun. 2024 to Sep. 2024



Canadians choose Walmart for Back-to-School shopping



In 2024, **92%** of Canadian parents planned to go Back-to-School shopping.⁷ Over **9 in 10 respondents** planned to do their Back-to-School shopping in-store at Walmart - the highest of all retailers.⁸ Essential categories like Grocery and Apparel continue to see high demand during the Back-to-School season.

FY25 Top Back to School Category Sales in-store and online at Walmart⁹

TOP CATEGORIES BY SALES



Grocery



Apparel



Beauty



Electronics



Stationery



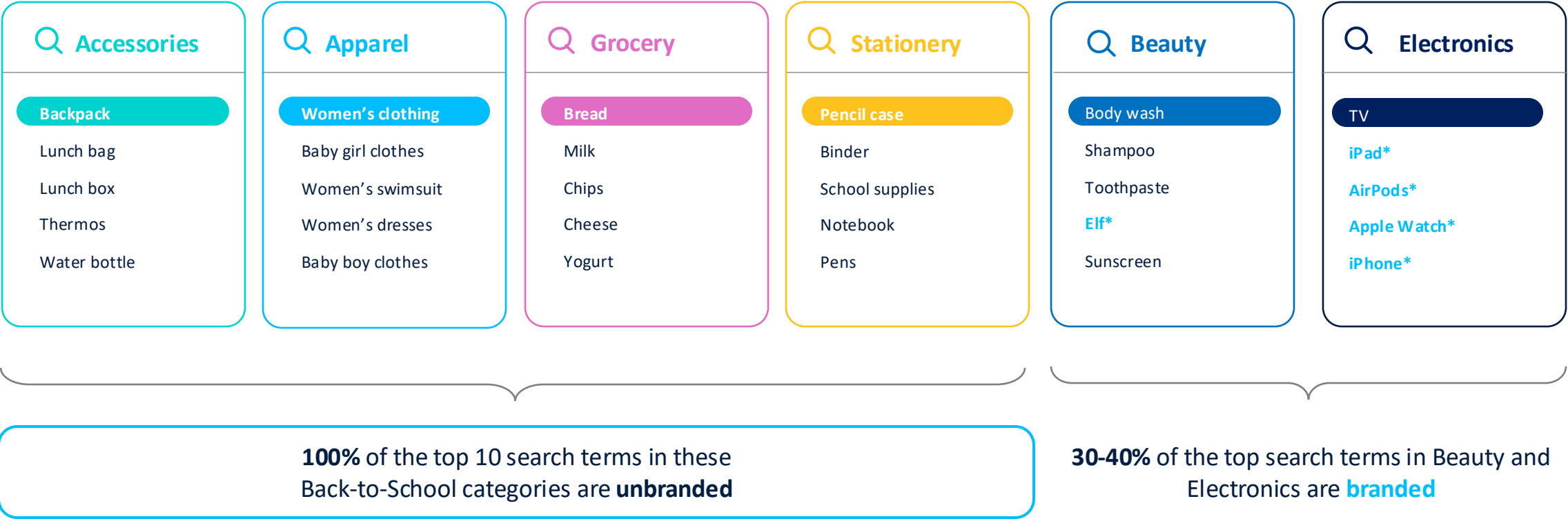
Accessories

⁷ Harris Poll / Nerdwallet Canada, 2024
⁸ Back to School Report, Field Agent Canada, 2024
⁹ Walmart 1P Data Jun – Sep 2024



Personalized Messaging based on Intent

The majority of Back-to-School searches at Walmart are unbranded and in categories such as Accessories, Apparel, Grocery, and Stationery. Shoppers in these categories are highly influenced by price and deals, rather than just brand names. However, almost half of the Back-to-School searches for electronics and beauty are brand-focused. Consumer messaging for this category should highlight the value proposition, key brand features and competitive advantage.¹⁰



¹⁰ Walmart 1P data from Jun. 2024 to Sep. 2024



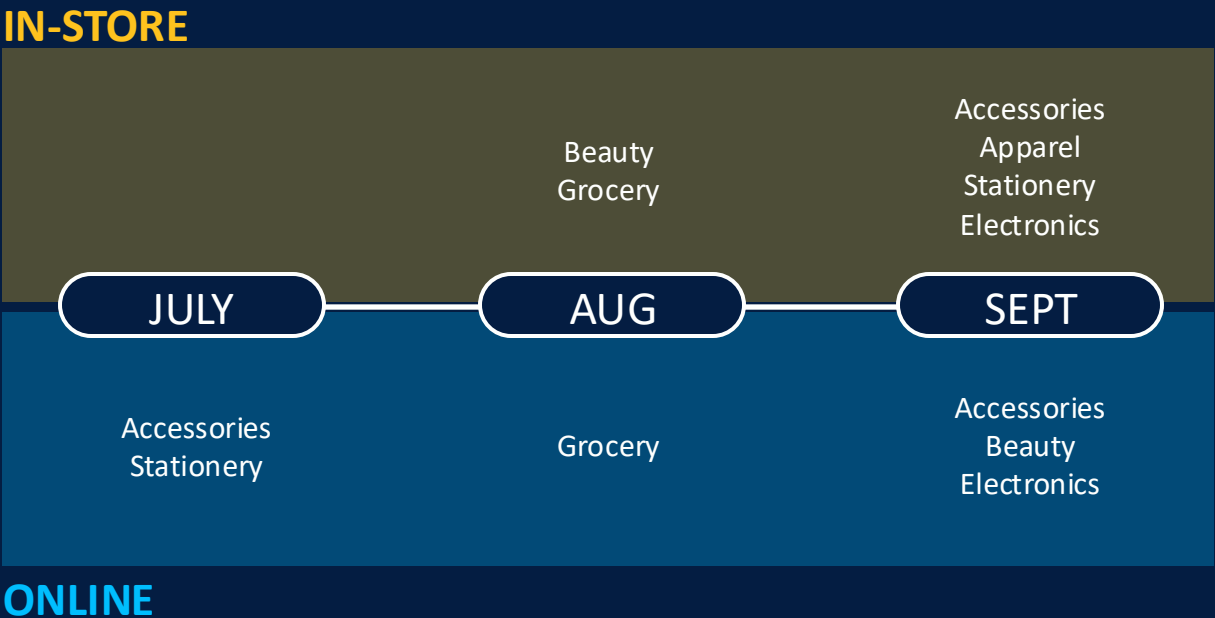
Back-to-School shoppers research and purchase in waves

Back-to-School shopping starts early! Shoppers go to Walmart to research and shop throughout the summer.

Search volume jumps in July and remains steady through to the end of summer for categories like Apparel, Beauty, Electronics, and Grocery. The Accessories and Stationery categories see steady increases in search before peaking in late August and early September, as last-minute shoppers are purchasing school essentials.

While in-store shoppers tend to do their Back-to-School shopping at the end of the summer, online shoppers start as early as July. Apparel and Stationery saw significant YoY sales growth around Walmart Deals in 2024.

Month of peak YoY sales growth in 2024 for key categories¹¹



¹¹ Walmart 1P data from Jun. 2024 to Sep. 2024
PROPRIETARY & CONFIDENTIAL



Walmart Connect



Accessories



Apparel



Beauty



Grocery



Stationery



Electronics





Accessories



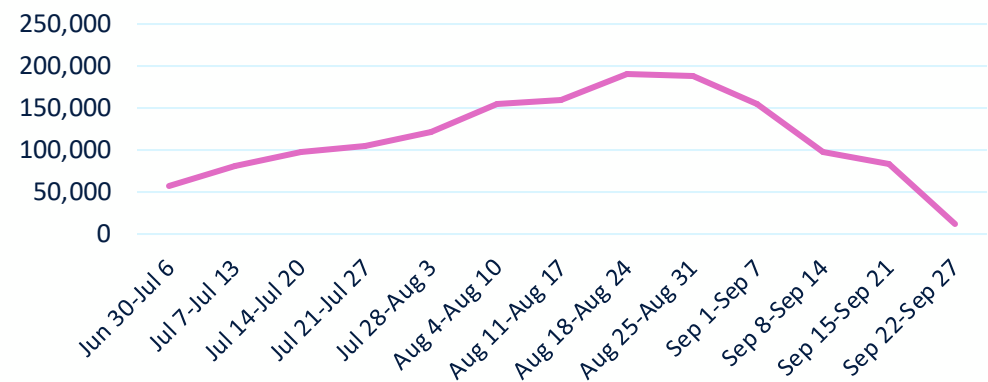


Accessories Shopping Intent¹²

Accessories search intent increased throughout the summer before peaking in the last two weeks of August, as last-minute shoppers searched for backpacks and water bottles.

FY25 Search Volume

Accessories, by week



Top Search Terms



Accessories

- | | |
|--------------------|----------------------|
| Backpack | Water bottle |
| Backpacks for kids | Backpacks |
| Lunch bag | Kids' water bottle |
| Lunch box | School bag |
| Thermos | Thermos water bottle |

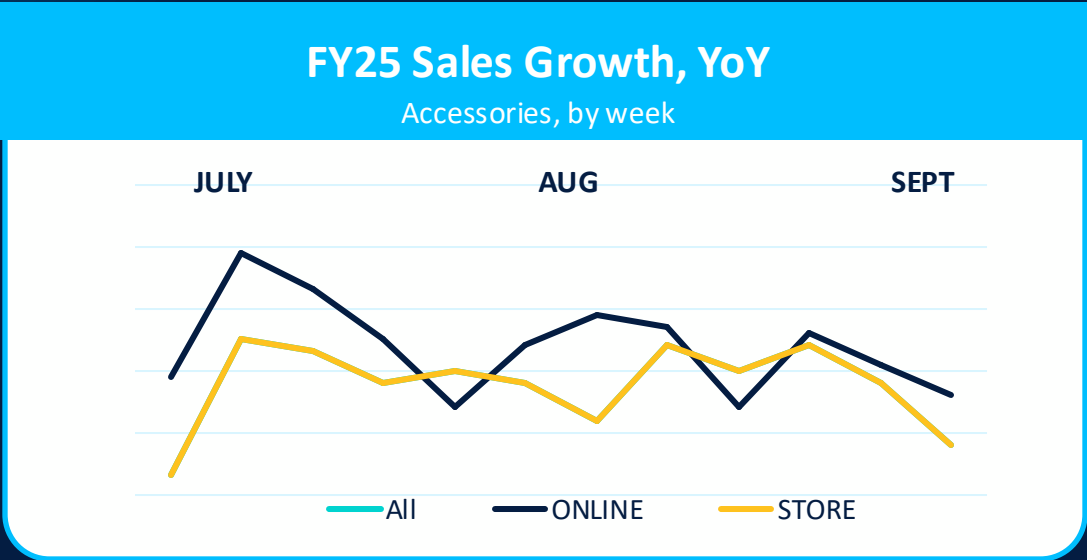
¹² Walmart 1P data from Jun. 2024 to Sep. 2024



Accessories Shopping Purchases¹³

YoY Sales

The online Accessories category saw double-digit sales growth YoY, with a **spike in online sales** starting in week 30 to 34 and a **spike in in-store sales** from week 32 to 34.



The top cross-shopped category online was Grocery, and in-store was Apparel.

AOV

Online AOV is **2x higher** than in-store AOV

Top Sub-Categories

Online



In Store

Water bottles

RANK 1

Kid's bags

Kids' backpacks

RANK 2

Backpacks

Kids' lunch boxes & bags

RANK 3

Lunch bags

¹³ Walmart 1P data from Jun. 2024 to Sep. 2024



Supply Checklist

Accessories Strategy

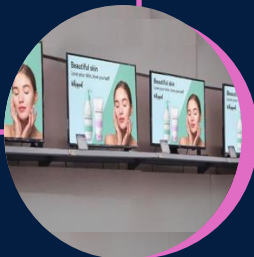
Build Brand Awareness

The majority of Walmart searches for Accessories are unbranded. Use **Sponsored Search** to increase brand awareness, sending your products to the top of relevant search results to build brand affinity and interest.



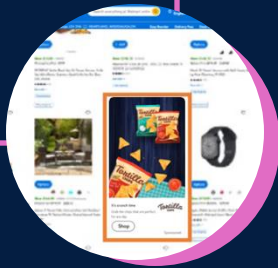
Drive Interest In-Store

Accessory sales tend to peak in-store late in the BTS season, around weeks 32 to 34. Utilize in-store placements such as **TV Wall**, and **In-store Audio** to capture the attention of the in-store shopper and help drive them to purchase.



Reach In-Market Shoppers

Reach in-market customers as they actively browse and search online for their supply needs. Capture your shoppers' attention with a **Tile Takeover** in the category, during this key shopping moment.





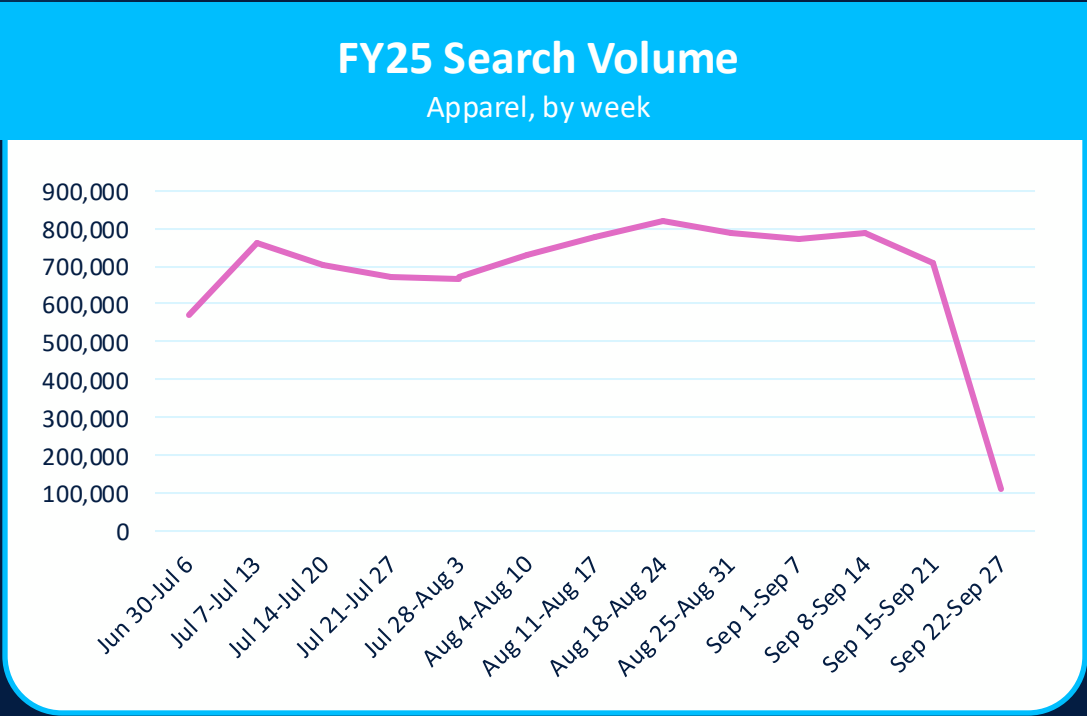
Apparel





Apparel Shopping Intent¹⁴

Apparel searches remain consistent throughout the BTS season as shoppers continued to search for essentials like women’s clothing, baby clothes and socks.



Top Search Terms



Apparel

- | | |
|-------------------|-----------------|
| Women’s clothing | Shoes for women |
| Baby girl clothes | Socks |
| Women’s swimsuits | Scrubs |
| Women’s dresses | Bra |
| Baby boy clothes | Men’s shorts |

¹² Walmart 1P data from Jun. 2024 to Sep. 2024



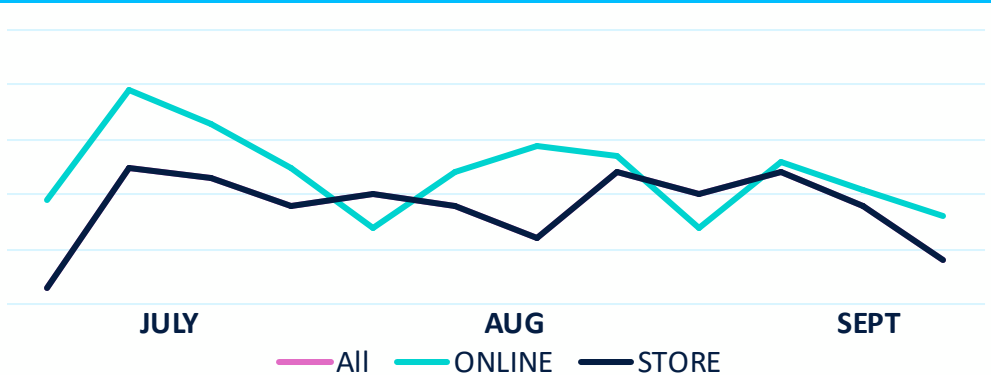
Apparel Shopping Purchases¹⁵

YoY Sales

Apparel saw **double-digit sales growth online in weeks 24 & 25.**

FY25 Sales Growth, YoY

Apparel, by week



The top cross-shopped category online and in-store was Grocery.

AOV

Online AOV is **1.2x higher** than in-store AOV

Top Sub-Categories

Online		In Store
Women's bras	RANK 1	Men's denim
Toddler shoes	RANK 2	Men's tees
Boys' shoes	RANK 3	Boys' knit tops

¹³ Walmart 1P data from Jun. 2024 to Sep. 2024



Supply Checklist

Apparel Strategy

Build Brand Awareness

Increase brand awareness and inspire product discovery while shoppers browse on Walmart.ca with **Sponsored Search, Tile Takeovers and Hero Banners.**



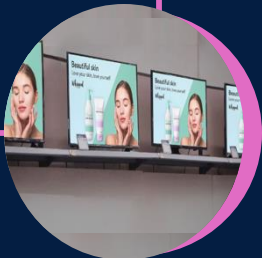
Drive Interest In-Store

Reach shoppers on their favourite social channels with **Influencers** to inspire shoppers of new fashion trends at Walmart.



Reach In-Market Shoppers

Utilize in-store placements such as **TV Wall**, and **In-store Audio** to capture the attention of in-store shoppers and help drive them to purchase.





Beauty



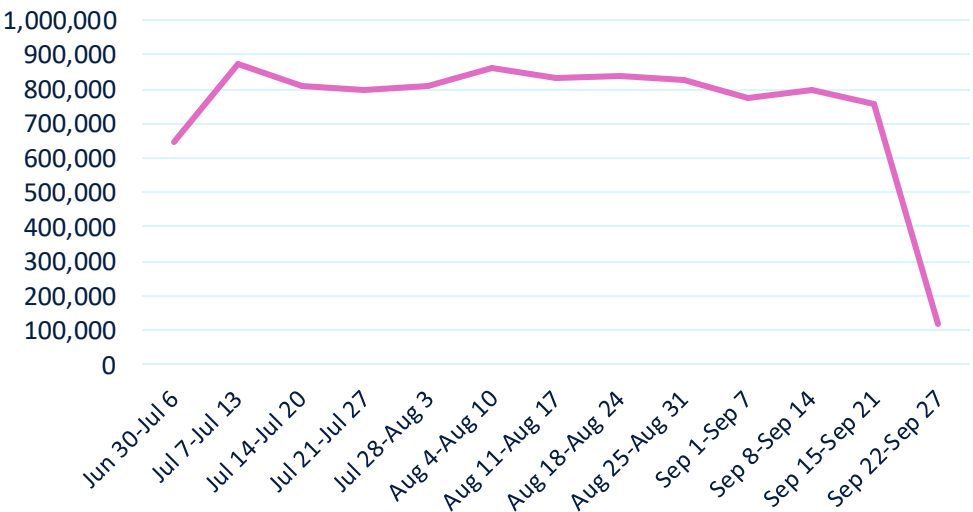


Beauty Shopping Intent¹⁶

Beauty searches remained consistent throughout the BTS season as shoppers continued to search for essentials like body wash, shampoo and toothpaste.

FY25 Search Volume

Beauty, by week



Top Search Terms

Beauty

- Body wash
- Shampoo
- Toothpaste
- Elf*
- Sunscreen
- Hand soap
- Hair dryer
- Bubble skincare*
- Dove bond strength
- Deodorant

*Branded

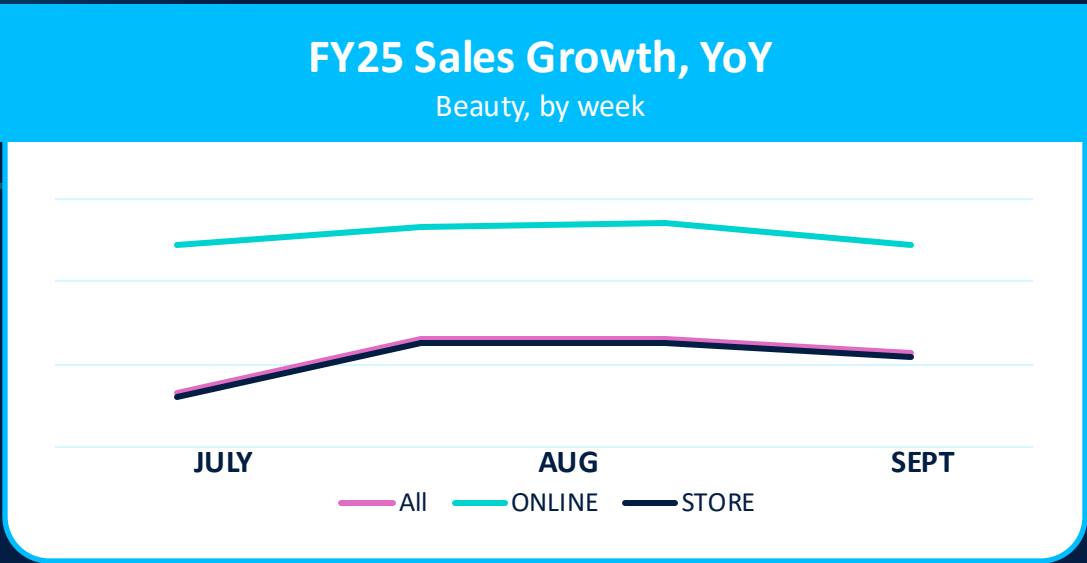
¹⁶ Walmart 1P data from Jun. 2024 to Sep. 2024



Beauty Shopping Purchases¹⁷

YoY Sales

Beauty saw **double-digit sales growth online** YoY, with sales remaining steady throughout the BTS season.



The top cross-shopped category online and in-store was Grocery.

AOV

Online AOV is **1.1x higher** than in-store AOV

Top Sub-Categories

Online



In Store

Body wash & shower gel

RANK 1

Men's wet shave

Shampoo

RANK 2

Shampoo

Disposable underwear

RANK 3

Body wash

¹⁷ Walmart 1P data from Jun. 2024 to Sep. 2024



Supply Checklist

Beauty Strategy

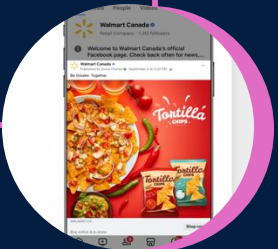
Build Brand Awareness & Drive Trial

Couple **In-store Sampling** with **Sponsored Search** by sending your products to the top of relevant search results to inspire product discovery and bring shoppers in-store to drive trial.



Reach Shoppers Offsite

Reach shoppers on their favourite social channels with **Influencers** to inspire shoppers of new fashion trends at Walmart.



Reach In-Store Shoppers

Utilize in-store placements such as **TV Wall**, and **In-store Audio** to capture the attention of in-store shoppers and help drive them to purchase.





Grocery



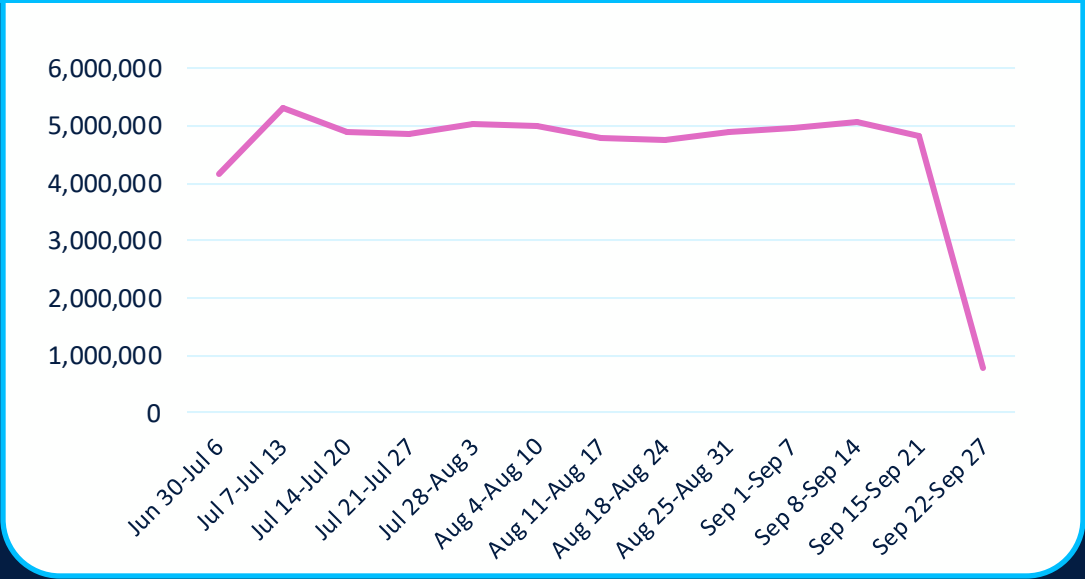


Grocery Shopping Intent¹⁸

Grocery searches remained consistent throughout the BTS season as shoppers continued to search for essentials like bread, milk and eggs.

FY25 Search Volume

Grocery, by week



Top Search Terms



Grocery

- | | |
|--------|-----------|
| Bread | Eggs |
| Milk | Chicken |
| Chips | Ice cream |
| Cheese | Cereal |
| Yogurt | Snacks |

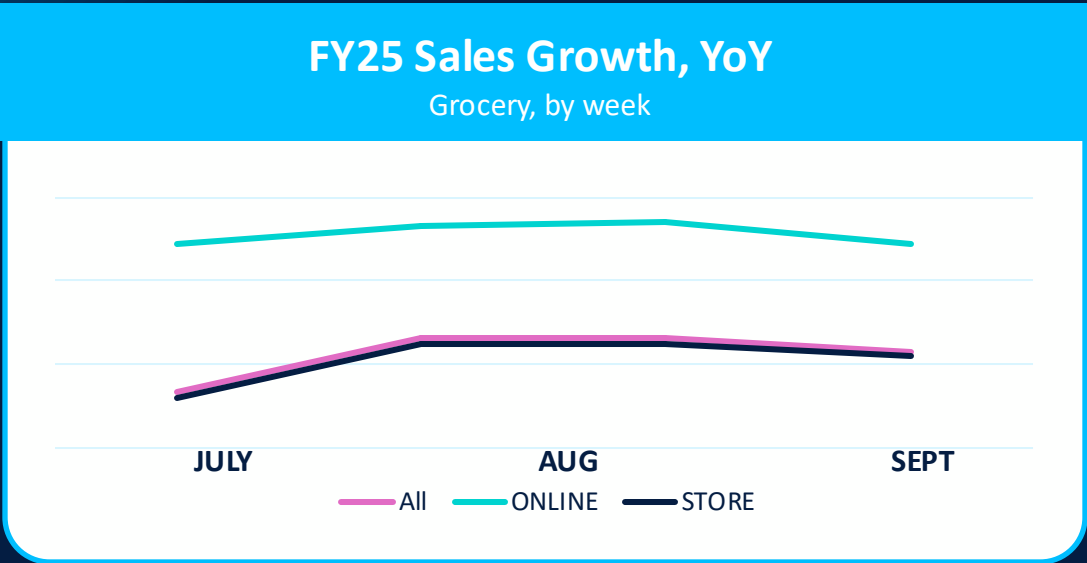
¹⁸ Walmart 1P data from Jun. 2024 to Sep. 2024



Grocery Shopping Intent¹⁹

YoY Sales

The online Grocery category saw **double-digit sales growth YoY**, with sales remaining consistent throughout the Back-to-School season.



The top cross-shopped categories online and in-store were personal care and consumables.

AOV

Online AOV is **2.7x higher** than in-store AOV

Top Sub-Categories

Online



In Store

Chicken & turkey breasts

RANK 1

White milk

Egg cartons

RANK 2

Air chilled chicken

2% milk

RANK 3

Coffee

¹⁹ Walmart 1P data from Jun. 2024 to Sep. 2024



Supply Checklist

Grocery Strategy



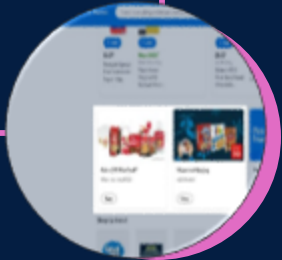
Build Brand Awareness & Affinity

Couple **In-store Sampling** with **Sponsored Search** by sending your products to the top of relevant search results to inspire product discovery and bring shoppers in-store to drive trial.



Reach In-Market Shoppers

Capture your shoppers' attention with a **Grocery Tile** as they actively browse and search online for grocery items.



Reach In-Store Shoppers

Combine **Blades** and Grocery exclusive **Wobblers** to drive awareness and consideration at the point-of-purchase, while shoppers are in aisle.





Stationery



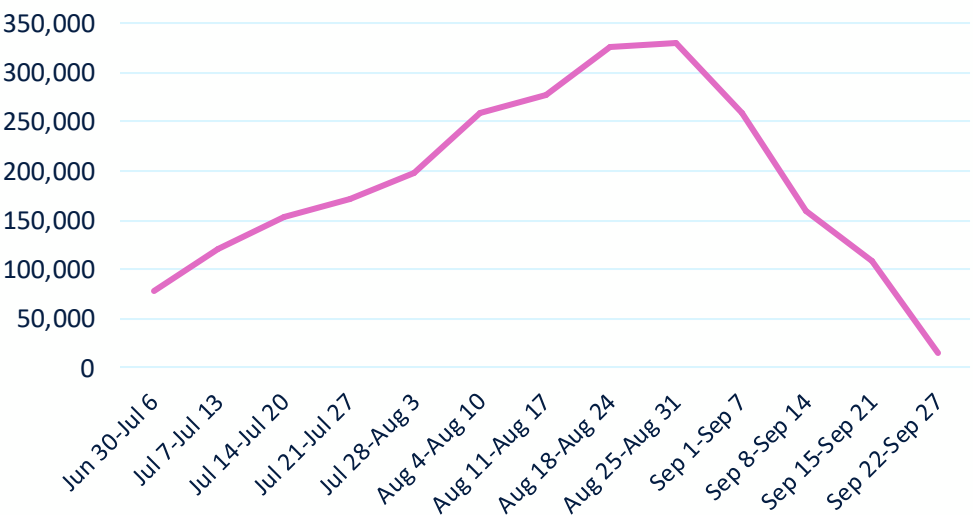


Stationery Shopping Intent²⁰

Stationery search intent increased throughout the summer before peaking in the last two weeks of August, as last-minute shoppers searched for pencils, pens and notebooks.

FY25 Search Volume

Stationery, by week



Top Search Terms



Stationery

Pencil case

Binder

School supplies

Notebook

Pens

Pencils

Markers

Duo-tang

Glue stick

Calculator

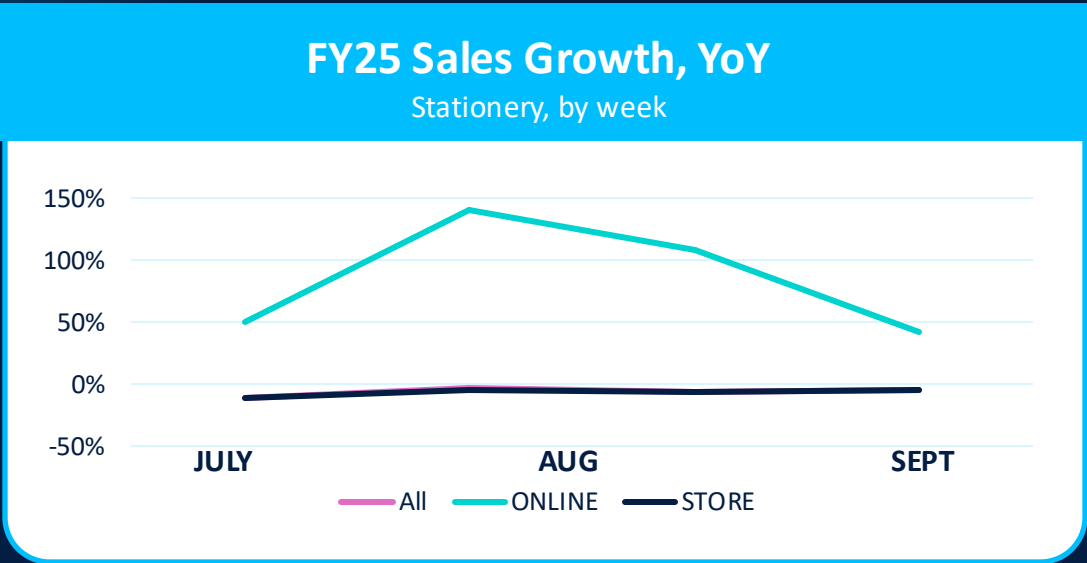
²⁰ Walmart 1P data from Jun. 2024 to Sep. 2024



Stationery Shopping²¹

YoY Sales

The online Stationery category saw **double-digit sales growth YoY**, with sales spiking in weeks 24 & 25 with **triple-digit sales growth**.



The top cross-shopped category online and in-store was Grocery.

AOV

Online AOV is **1.2x higher** than in-store AOV

Top Sub-Categories

Online



In Store

Markers & colouring sets

RANK 1

Everyday counter cards

Binders

RANK 2

School notebooks

Crayons

RANK 3

Pens

¹⁹ Walmart 1P data from Jun. 2024 to Sep. 2024



Supply Checklist

Stationery Strategy

Build Brand Awareness

Keep your brand top of mind throughout the BTS season by increasing your **Sponsored Search** spend.



Reach In-Market Shoppers

Reach in-market customers as they actively browse and search online for their essential BTS items. Capture your shoppers' attention with a **Hero Banner** in the Office, Crafts and Party Supplies category, during this key shopping moment.



Reach In-Store Shoppers

Utilize in-store placements such as **TV Wall**, and **In-store Audio** to capture the attention of in-store shoppers and help drive them to purchase.





Electronics



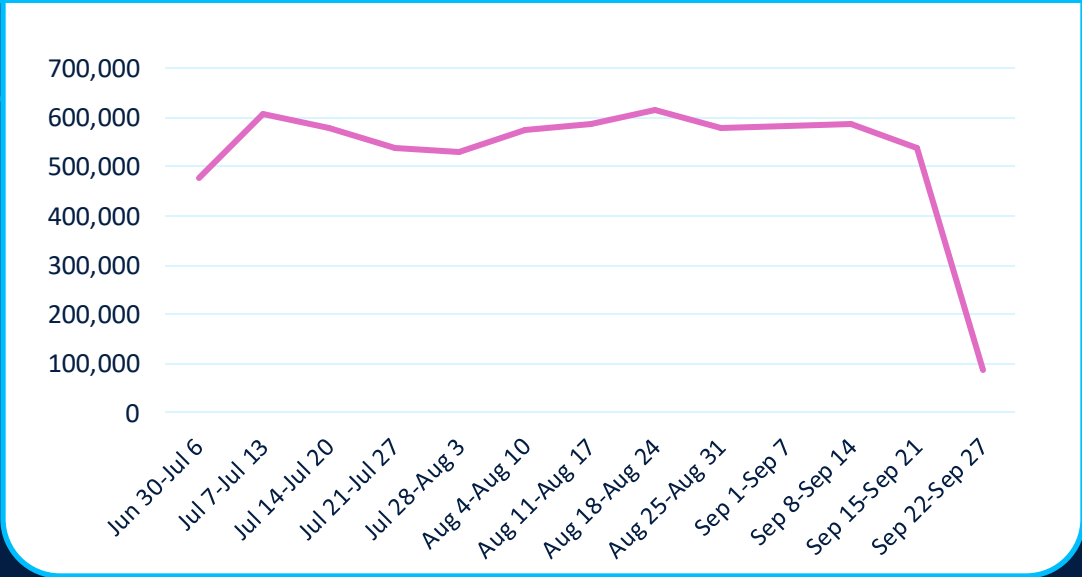


Electronics Shopping Intent²²

Electronics searches remained consistent throughout the BTS season as shoppers continued to search for TV's, iPads and laptops.

FY25 Search Volume

Electronics, by week



Top Search Terms



Electronics

- | | |
|--------------|------------|
| TV | Laptop |
| iPad* | Smart TV |
| AirPods* | TV's smart |
| Apple Watch* | Printer |
| iPhone* | Headphones |

*Branded

²² Walmart 1P data from Jun. 2024 to Sep. 2024



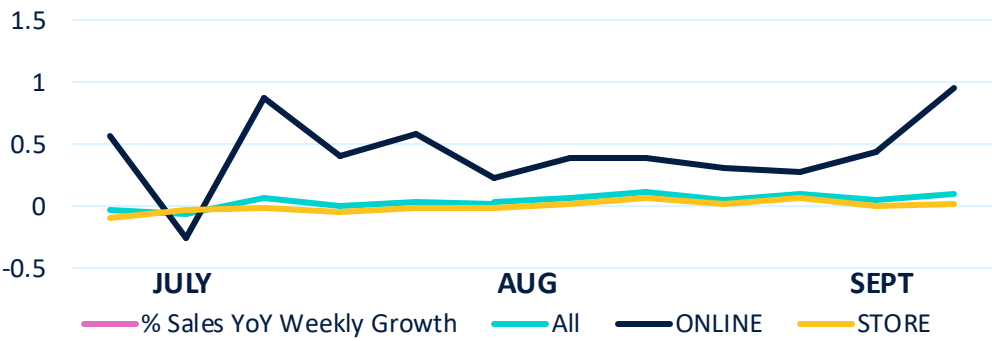
Electronics Shopping²³

YoY Sales

The online Electronics category saw **double-digit sales growth YoY**, with online sales spiking significantly in weeks 25 and 34.

FY25 Sales Growth, YoY

Electronics, by week



The top cross-shopped categories online and in-store were personal care and consumables.

AOV

Online AOV is **3.7x higher** than in-store AOV

Top Sub-Categories

Online



In Store

Tablet Brand

RANK 1

39" to 45" TV's

Unlocked phones

RANK 2

65" TV

Wireless earbuds

RANK 3

Laptop

²³ Walmart 1P data from Jun. 2024 to Sep. 2024



Supply Checklist

Electronics Strategy



Build Brand Awareness

Almost half of shoppers are searching for a specific brand during the BTS season. Increase **Sponsored Search** spend sending your products to the top of relevant search results.



BTS Digest

Participate in Walmart’s multi-vendor **Back-to-School Digest**, showcasing your brand’s newest products with a mix of onsite and in-store placements building awareness and driving consideration.



Reach Shoppers Offsite

Capture shoppers’ attention offsite with **Google Shopping Ads** to inspire product discovery and bring shoppers to Walmart.ca. Continue through mid September, as Walmart sees an increase in sales due to new product announcements.





Thank you

