



A REPORT CARD ON BACK TO SCHOOL: The Season's Trends and What They Mean for Holiday

WRITTEN BY
Allison Mooney
Jordan Rost

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THE **RUNDOWN**

As summer draws to a close, we took a look at back-to-school shopping trends across Google and YouTube to see how this year compared to past years. Not only have searches grown over last year, but the season is lasting longer than ever, becoming the unofficial start to holiday shopping. It's also the start of potentially lifelong brand affinities for millennials. As the college-bound leave the nest for the first time, they're making all-important purchases that will set the tone for years to come. They have more choices than ever and are turning to the web—especially video and mobile—to discover and shop. This year, they sought out products that save them time, space and money. And if they can't find exactly what they want, they'll make it (hello, washi tape). Study up on the trends—they'll help you this holiday season.

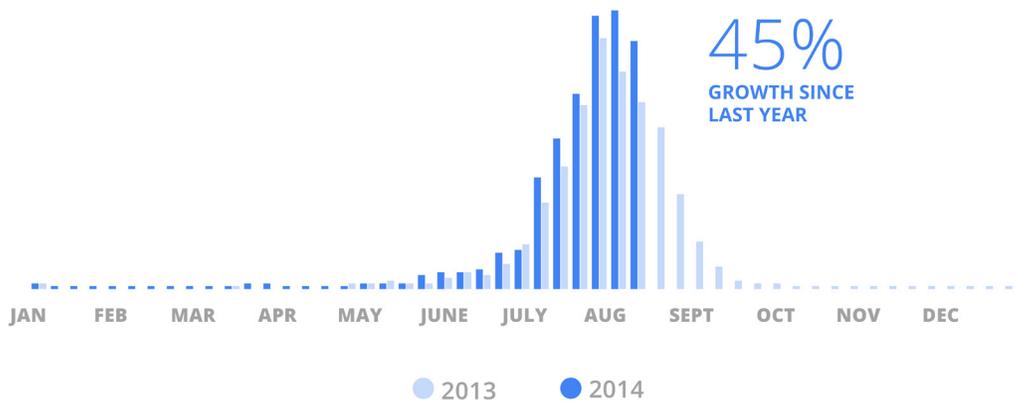
think with **Google**

Back-to-school season is longer than ever

Taking a look at searches on Google, we found that the start of summer is actually the start of the back to school shopping season. Back-to-school is the second-largest retail event of the year, and it's growing.

- Almost as soon as school's out, back-to-school shopping begins. Searches started as early as May and peaked in August (chart 1).
- That peak lasted 1-2 weeks longer than it did last year, and interest is still high, indicating that shoppers are still in the market (chart 1).
- Back-to-school searches on Google are higher than ever. Overall, searches grew 45% YoY (through August 15) (chart 1).

Searches for "Back to School"



Source: Google Data, January 2013–August 2014, Indexed Search Query Volume, United States

Retailers are likely spurring this early interest with mid-summer deals like those offered by [Walmart and Staples](#). Indeed, [searches for "back to school sales"](#) also spiked sooner and are trending higher than they did in previous years.

Another big factor: the web. According to [Deloitte Vice Chairman Alison Paul](#), "24/7 online convenience allows parents—and students—to shop any time, not just during the traditional mid- to late-summer back-to-school period. Consumers are more precise about what they buy and may no longer feel the need to stock up as they did in the days before the internet."

Not only is the web open 24/7, but people are using it to shop throughout the day (and even more at night) on smartphones. According to Google data, so far this month, 40% of back-to-school searches were done on mobile. That's a 25% increase from last year.

As back to school stretches into fall, it's being met by early holiday demand. Fifteen percent of consumers have already started shopping for the holiday season and 5% more will start before Labor Day, according to a July Google consumer survey. Looking at last year's Google Search trends, we see that apparel searches started rising in July and continued an upward climb through December (chart 2). Marketers now have an earlier look at what consumers might be interested in this holiday season, and that means more chances to capture interest with ads, promotions, discounts and more.

Apparel Category Searches



Source: Google Data, January 2012–August 2014, Indexed Search Query Volume, United States

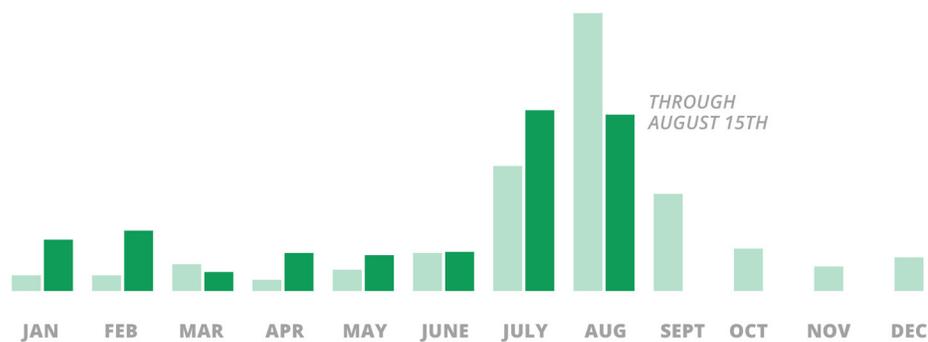
YouTube creators are the new influencers for college-bound millennials

More marketers are focusing specific back-to-school efforts on the college set, and for good reason. These students and their parents [drive the biggest back-to-school spending](#), and the [NRF](#) found that it's up 10% from last year. Young adults headed off to college are about to make a lot of purchasing decisions that they've never made before—these are big opportunities for brands to win new and loyal customers.

To decide what to bring, college students are turning to haul videos on YouTube. These videos, featuring shoppers with their latest finds, started trending a few years back and are gaining in popularity. According to Google/YouTube data:

- [Searches for “back to school haul”](#) on YouTube are up 70% this year.
- [Searches for “dorm hauls”](#) on YouTube increase more than 2x in the first 10 days of August YoY.
- YouTube creators are getting ahead of the game. Compared to 2013, twice as many back-to-school haul videos were posted in the first seven months of the year (chart 3).

“Dorm Haul” Video Uploads to YouTube by Month



Source: YouTube Data, January 2013–August 2014, Indexed Video Uploads, United States

Another source of inspiration for students is dorm tour videos. In these, students show how they turned a small, impersonal space into a place they're proud to call home.

- [“Dorm tour” searches](#) on YouTube are rapidly trending with searches up 1.7x this August as compared to last year (chart 4).
- “Dorm tour” has some interesting [correlations](#) that hint at consumer interests, including brand affinities (“covergirl and olay”), beauty tips (“eyeliner on top lid”) and evasion techniques (“ways to look sick”).

“Dorm Tour” Searches on YouTube

JULY 27 - AUGUST 2



AUGUST 3-9



AUGUST 10-15



Source: YouTube Data, August 2013 and August 2014, Indexed Search Query Volume, United States

Brands are getting in on this action, too. Target launched a YouTube video series called *Best Year Ever* that gives tips for designing dorm or off-campus spaces. Hosted by four YouTube stars, [Todrick Hall](#), [Mikey Bolts](#), [Tiffany Garcia](#) and [Ann Le](#), it's running on both [Target's YouTube channel](#) and the stars' own pages. So far, there have been over 3.2M views combined.

Aeropostale recently worked with another YouTube creator, Bethany Mota, on a [room design line](#). Smart move. Mota is an influencer for millennials—her YouTube fans often ask about her style—and her back-to-school videos are among her most popular. Three of her 15 most-watched videos of all time cover back to school (totalling 15.7M views), and her [latest](#) got 2.5x more likes per view than the average for her regular August videos.

Young DIYers are looking for cheap, clever ways to decorate their dorms

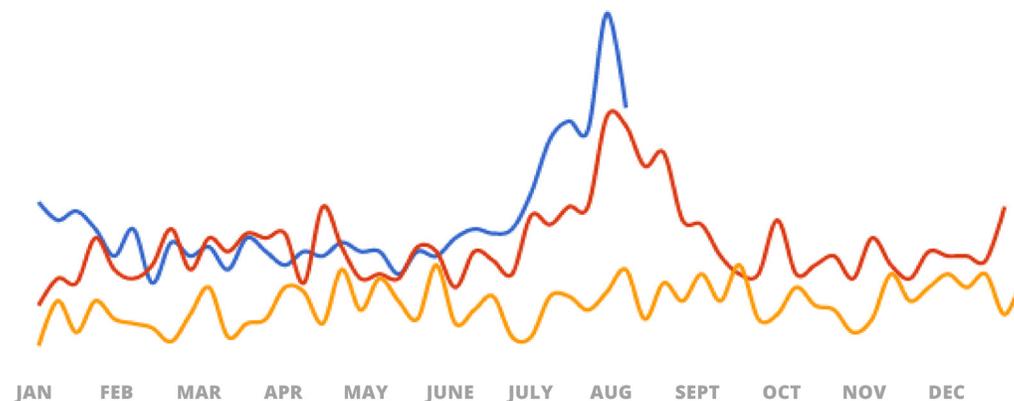
No longer do students need to have the same futon and mini fridge as everyone else. The web offers infinite ideas and options for one-of-a-kind dorm decor, and people are using Search to find them.

- [“Dorm decor” searches](#) on Google are up 37% YoY.
- We've seen a 30% YoY growth in dorm-related Google searches for Dormify, Apartment Therapy, BuzzFeed, HGTV, Seventeen and Pinterest.

Products that help provide customization are on the rise. For example, dorm dwellers are looking for cheap, easy-to-use items, such as washi tape and wall decals, to “hack” mass market items.

- [Washi tape](#) is a growing trend in general, and it’s becoming more popular around back-to-school time (chart 5).
- Consumers searching for dorm room-related topics are about 100x more likely to be searching for washi tape than the average Google user and about 150x more likely to be searching for wall decals (Google Data).
- Publishers like HGTV, DazzleDIY and AwesomenessTV are sharing washi tape decorating ideas to capture this interest.

Searches for "Washi Tape"



Source: Google Data, January 2012–August 2014, Indexed Search Query Volume, United States

On campus, smartphones are more essential than TVs

The period when students are heading to college is a critical time for brands to earn loyalty, and no one knows this more than consumer electronics manufacturers. “When shopping for electronics, students decide what they want before searching for the lowest price,” comments Jamie Gutfreund, chief strategy officer of The Intelligence Group, in [eMarketer](#). Even if millennials are not spending their own money (though [many are](#)), they have a lot of influence over the purchase. “A parent is not going to buy their kid a Samsung if they’re saying, ‘I want an Apple,’” Gutfreund says.

The must-have tech for students? Smartphones. They're as essential to college kids as the snooze button.

- Smartphones rank as the most popular electronic device owned by college students ([Deloitte](#)).
- People searching for “dorm” are also searching for “mobile” more than either “computer” or “tablet.” This is a big shift from four years ago (Google Data).
- Back-to-school searches in the mobile and wireless category are up 32% (Google Data).

Mobile devices are even becoming the new TVs on college campuses. According to a Google Consumer Survey conducted in August, college students are 30x more likely to list a phone as their favorite device than a TV. Looking to save space and money, students are using their mobile phones for networked gaming, streaming videos and more. We can see this trend in views of those dorm haul videos on YouTube.

- So far in August, 43% of views of haul videos on YouTube happened on mobile devices. That's 1.5x the mobile share of views in January (Google Data).
- Mobile trails only TV as the platform that has the longest view time per view of haul videos, exceeding computer totals by 15% (Google Data).

Students are looking for products that save space, time and money

Going to college is a very different experience for today's constantly connected millennials than it was for previous generations. But one thing hasn't changed much: the size (or lack thereof) of dorm rooms. When it comes to tech products they're looking for those that save space as well as time and money. For example:

- Wireless chargers for smartphones and laptops prevent tangled messes and—worst of all—missed texts. They've been trending over the past months—up 72% since June, and 14% YoY (Google Data).
- Individual coffee makers provide quick caffeine hits. Keurig released a [college-branded product line](#) late last year, and “Keurig college” searches were up 48% YoY in August (Google Data).

Now that we've gone back to school, here's a cheat sheet for the holiday season

As the season gets longer, back to school can be seen as the unofficial start to the holidays and a great bellwether of trends.

- To capture interest throughout this time, keep your campaigns going strong.
- Adapt your holiday plans based on what you've learned from back-to-school campaigns.
- Make sure you're thinking about mobile constantly (take a page from our [playbook](#)).
- See what's big on YouTube and look to popular creators as potential spokespeople.
- Position your products for the DIYer. Share tips and tricks on using your products in creative ways.
- Gear promotions and sales to capture interest in products that save space, time and money.



Allison Mooney
Editor-in-Chief, Think with Google and Head of Trends & Insights



Jordan Rost
Analytical Insights Marketing, Google