

2017 Back to School Retail Opportunities in MENA

MENA's retail industry accounts for \$450 bn, with substantial economic potential during different seasonal retail moments throughout the year. Back-to-School season is the 2nd largest moment for retail in MENA. Google's powerful cross-platform solutions can help your brand capitalize on this seasonal opportunity.



What is Back to School (BTS)?

75M+

students in MENA start their academic year in the first ten days of September 2017

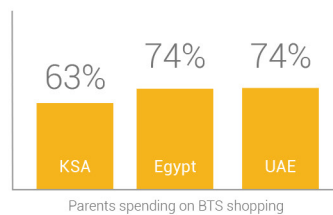


\$30 bn

BTS opportunities in MENA

1/3

of BTS shopping will be driven by promotions



parents will spend 10% more on BTS in 2017 compared to last year



Google can help you capture BTS purchase intent, increase awareness and drive sales.

Top of Mind BTS Shopping Categories for Parents in MENA^(*)

- School uniforms
- Stationery
- Tech/gadgets
- Clothes
- Sports kits



- Lunchbox shopping
- Hygiene items
- Furniture
- Tutoring
- Music instruments

Search Interest Peaks Especially on Mobile

12X

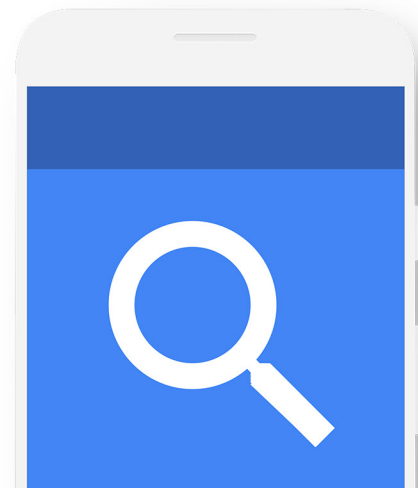
Growth of BTS searches
on Mobile Vs. Desktop

22%

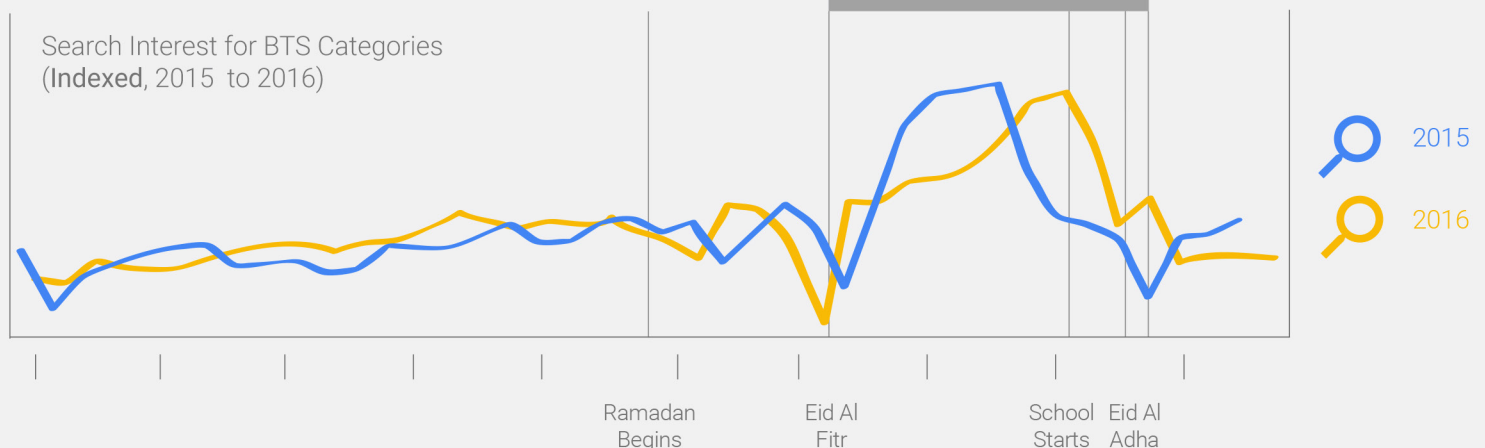
Jump in BTS searches
from July to August 2016

52%

YOY increase in BTS
searches in August 2016



Back to School Seasonality Trends



People Have Varying Mindsets at Different Stages

Pre-Peak

Upto 1 month before BTS

Interest starts growing
as families return from
summer vacations.

Peak

1 - 2 weeks leading upto BTS

The start of the school term is
imminent, getting the kids ready
for the new academic year is top
of mind. Parents actively
shopping for BTS supplies.

Post-Peak

1 - 2 weeks after BTS

Kids are now in school.
Many parents are late on
BTS shopping, additionally
more shopping is induced by
seeing what other kids/
parents bought.

Which Categories are Impacted?

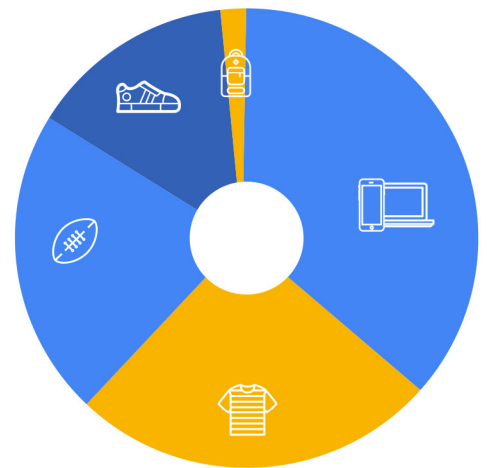
Electronics

Mobile is driving growth
19% growth in query volumes on mobile; desktop relatively flat

Clothing

Robust growth in search interest
6% growth in query volume; UAE at 10%+

CTR growth strong; led by mobile
CTR rose YOY at 55% ;62%+ on mobiles in KSA



Categories by Query Volume
(BTS period, 2016)

Sporting Goods

Query volumes growing, driven by mobile
13% growth in query volume both in UAE and KSA; mobile queries growing at 21% YOY

Increased engagement with ads
CTR increased by ~50% vs. last year for sporting goods related queries

Footwear

Both query volumes and engagement increasing
10% growth in query volume; CTR 50%+ higher vs. last year

Supply is high, especially in UAE
~3 advertisers appearing per user query

Bags

Mobile auction intensity increasing, especially in UAE
3 or more advertisers appearing per user query in both UAE and KSA

Significant growth in both CTR and click volumes
Both the number of clicks and the CTR increased by ~30% vs. last year

Who Are Back to School Shoppers?

Savers



Look for the best deals within a specific budget, prone to collecting coupons, and are willing to visit competing stores to get the most cost-effective prices. Start shopping as early as possible.

Planners



Stick to a specific list of purchases, they know which store they are visiting and what they are buying.

Students



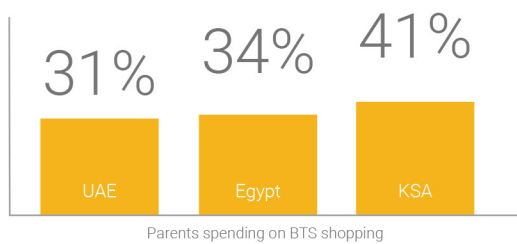
Either about to start their university life or are current university students. They are excited about the new start and their shopping patterns are largely effected by peers and trends.

Convenience Shoppers



Have a busy schedule and no time to hunt for bargains, they need to finish all the BTS shopping as fast as possible and within one trip. They are most likely to shop online.

It Is Critical to Be Top of Mind and to Promote



parents say sales promotions are key drivers for BTS spend

50%

parents in MENA buy known brands that are discounted when making new school purchases

How Can Google Help You Capture this Opportunity?



Target Back to School shoppers and select your audience



Reach your target audience for Back-to-School with the best keywords with Google AdWords



Ensure that you are mobile ready with TestMySite and mobile opt-in



Announce your promotions using YouTube bumper Ad



Engage potential customers with Google's remarketing solutions



Measure impact and track results with Google Analytics



AdWords



AdSense



Analytics



Google My Business



YouTube



Google Play



Maps

For more information visit us at www.google.ae/adwords
or call us on 8000-444-8706

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Source: YouGov, Back to School Survey, MENA, 2016. N=5,490
YouGov, Omnibus Study, Egypt, KSA, UAE, 2015. N=729; BTS shopping to increase by 10% for 74% parents in UAE and Egypt, 64% in KSA
eMarketer, Back-to-School Shopping Preview 2017: Strong Overall Sales Hide Weakness in Key Sectors, US 2017
©Based on search queries
Google Insights
CISION, Back to School Social Insights Report, 2016: Consumer Segmentation

