



BACK TO SCHOOL 2015 MARKET RESEARCH REPORT

PART ONE – RETAIL REVIEW

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This is a comprehensive qualitative market research report on the 2015 Back to School Stationery market in the retail sector.

PART ONE firstly looks at the current macro environment for the stationery industry and the assessment criteria for the report.

Secondly it will cover individual retailers looking at product ranges, placement in store, pricing and promotions, visual merchandising, secondary space and marketing.

PART TWO will look at the online back to school offer and also contains the report conclusion.

PART THREE will look at fashion trends and new products.

APPENDIX There is a spreadsheet appendix available reviewing retail pricing on 50 market leading products in August 2015.

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PART ONE – THE RETAIL CLIMATE

There's something about going back to school, which marks a very special time of year. For parents it's the passing of time and the nostalgia of remembering their own school days. For children it's the excitement and anticipation of starting a new school year and having a whole new school kit to go with it.

As a stationery industry it's our big event of the year which can either make or break our sales targets. For most of us the planning for next year's back to school season has usually started before we have even finished trading the current year.

Before we get into the detail let's stop for a minute to review the back drop of the back to school 2015 promotion and look at the general retail climate in the UK at the moment.

Which? report

In April 2015 Which? launched a super complaint to the competition and markets authority entitled 'misleading and opaque pricing practices in the grocery market'. The report details that the practices of concern are as follows:

- *Confusing and misleading special offers that make extensive use of price framing including reference pricing, volume offers and free offers;*
- *A lack of easily comparable prices because of the limitations of unit pricing;*
- *Reductions in pack size without any corresponding price change.*

To quote the report, *'We are concerned about pricing practices both individually and because they interact to complicate consumer choices when many people have little time to carefully assess how accurate or meaningful the prices or savings that are being offered actually are.*

The complexity of pricing, with many inconsistent units used for similar products makes it difficult even for very diligent consumers to effectively make comparisons.' www.which.co.uk (Report title Which? Super-Complaint to the Competition and Markets Authority. Misleading and opaque pricing practices in the grocery market. 21 April 2015).

This complaint has been brewing for some time and negative press led some retailers to take action last year to sign up to a code of conduct around promotional pricing. Although the complaint is about grocers specifically the problem is market wide with retailers usually sticking to the letter of the law around price establishment for events such as Back to School i.e pricing establishing in 10% of stores for 28 days before applying discounts.

The code of conduct has led some retailers to take action around their pricing policies and establish everyday fairer pricing rather than high low pricing. As you read through the report you will notice which retailers are now making this claim. However, if a retailer adopts this pricing strategy rather than discounted offers, could it be perceived to put them at a competitive disadvantage during an event such as Back to School, which has previously been price and promotion led?

It's always interesting to look at the start pricing and question how much volume could actually be sold at that price before an item was discounted. Promotions often act as a smoke screen, providing larger sales uplifts as research has shown that customers see the red tickets and think they are getting a great deal. Sometimes they are, sometimes they aren't. As you read the research and compare pricing in the appendix you will be able to make up your own mind.

Economic Climate

As a nation we are emerging from over 6 years of economic recession, which has made people review their shopping habits. Stagnant wages, falling living standards and a squeeze on disposable incomes has turned us into a nation of savvy shoppers. The economic climate has now picked up and with lower unemployment and almost flat inflation figures, people have more money in their pockets. In a report released on 25th August 2015 Conlumino forecast that, *'total retail spending on Back to School is forecast to reach £1.45 billion in 2015, 1.4% more than last year (£1.43 billion) and 2.7% more than 2013 (£1.41 billion). Last year saw £842 million spent on school uniforms, £225 million spent on sportswear and sports equipment, £148 million spent on stationery, £130 million on school accessories and £83 million spent on school books.'* www.conlumino.com/?p=2107

Some key trends have emerged over the past six years:

Growth of pound shops and discounters

Aggressive store opening programs and larger store networks have made discount stores accessible to everyone.

Aldi and Lidl have targeted the big 4 grocers with their focus on price and simplicity. Aldi claim *'we will not let competitors compete on price,'* with a minimum 15% basket discount. On food they have also recognised the importance of high quality fresh product meaning UK shoppers can save money without compromise. They have been very clever to target all demographics including ABC1s in terms of store locations. This means there is a wider acceptance amongst more affluent customers when it comes to discount shopping.

Pound shops have also reinvented themselves to offer a more comprehensive and varied range of goods. They are also selling more brands than ever before. In a recession people cut back on spending and are more likely to be attracted by bargains. Shops that were previously considered downmarket now appeal to the masses and there is little sign of shopping habits changing now the economy is improving.

Growth of convenience stores

IGD have forecast that the convenience market is set to expand by a further 13% between now and 2020. Top up shopping is becoming the norm, and both Tesco and Sainsburys now have more convenience stores in their portfolios than supermarkets. The same people are shopping in supermarkets and convenience stores. What differs is their approach to shopping in terms of their behaviour and expectations. They have a shorter amount of time in the store, spend less and focus on top up shopping. Retailers are tailoring their convenience store formats to appeal to local shoppers such as city centre, student or neighbourhood formats. The local store format is perhaps the most traditional in terms of the way people shop and it's here to stay.

Growth of online

According to E-consultancy online retail sales are predicted to reach £52.25bn in the UK this year, a 16.2% increase on 2014. This equates to 15.2% of all retail sales in the UK.

(<https://econsultancy.com/blog/66007-uk-online-retail-sales-to-reach-52-25bn-in-2015-report/>).

The internet makes almost any product available at the click of a button and with new services such as Amazon Prime offering same day delivery customers now have the power to shop when and how they want.

So how does all of this affect our industry, surely it's just about how people buy their food? Believe this at your peril....

I first started doing reports on the Back to School Market back in 2007. At that point I reviewed the Back to School offers in Paperchase, WHSmith, Woolworths, Tesco, Sainsburys, John Lewis, Ryman and M&S.

For this report I have reviewed Tesco, Sainsburys, Asda, Morrisons, Waitrose, John Lewis, Paperchase, Smiggle, Tinc, WHSmith, WHSmith travel, Wilkinsons, Ryman, Staples, B&M Retail, the Works, Aldi, Lidl, Poundland, 99p stores, and the Range. Woolworths has gone but the amount of retailers now selling stationery has more than tripled. This has huge consequences for the industry in terms of which customers to target, distribution channels and pricing. Deflationary retail pricing is not just something that affects the food markets. What astounded me when I was overhearing the conversations of back to school shoppers was how many of them were comparing prices and asking 'how much was it in X shop, shall we go back there?' Consumers are applying the same savvy shopping rules to stationery as they do to food and increasingly shopping around.

They also expect to be able to find what they want, when they want it. With the larger percentage of people still leaving their back to school shop to the week before children go back to school, convenience stores can pick up on last minute stationery sales.

As for online it is growing but it hasn't taken off in such a big way in the back to school stationery retail markets as in the B2B sector for various reasons. Partly it's to do with the low cost of goods and post and packaging being such a big percentage of the price. Partly it's to do with some grocers having their clothing and stationery on different websites so they are missing opportunities to cross sell product. Stationery also isn't the easiest product to shop online as there are so many products you need to know exactly what you are shopping for and ideally you want to find it all in one place, otherwise it makes delivery costs expensive.

At back to school time it's also often a shopping trip that parents want to do with their children. School uniform is often the lead purchase at back to school time which often involves trying on of said uniform. Often half the fun of buying things is the shopping experience and selecting what products to buy, which is why we all love retail theatre. It will be interesting to see if this year consumers do spend that extra bit of money they have in their pockets on their kids for Back to School or whether they save it up for Christmas.

However, in spite of the above online shouldn't be overlooked. It is a key part of all retail growth strategies, John Lewis for example is investing 37% of its capex in IT in coming years with the end goal of becoming omnichannel. According to research done by UCAS the younger the audience the more influenced they are by peer to peer reviews particularly social media

and according to research done by Henkel young people spend on average 8 hours a day in front of a screen of some type.

Online retailers such as Very are already selling some stationery and other retailers such as Smiggle are using their website to create interactive relationships with their customers.

Online should not be underestimated as a way to build your brand and communicate with your end consumers. Savvy brands should be using digital media to build relationships with the people who are buying and using their products. In the future we will all be omnichannel.

Assessment criteria – What makes a good Back to School campaign?

Before the retailers and ranges were reviewed, the criteria for what makes a good Back to School trading campaign were determined. Of course meeting sales and profit targets are the two key measures of success for any retailer. However, what are the key ingredients that need to go into a Back to School campaign to get these results?

Strategy

Back to School is the Christmas of the stationery industry and of course it's not just about kids going back to school. It's also the time when adults and offices will stock up on stationery. Children are on summer holidays, which brings about different shopping dynamics and behaviours. A successful retailer will need to decide, dependant on space, who they are going to target. The school shopper, students, the office worker, the bargain hunter, the teacher, the stationery addict, the frazzled parent desperate for anything to occupy their kids for ten minutes over the summer! Who is targeted will also depend on overall business and corporate strategy. For example a retailer whose cooperate strategy is to target families with school age children may not range so much traditional office stationery.

Product

Product should be at the heart of any retail campaign.

In terms of our personas above: The **school shopper** will be children or parents shopping from a specific back to school list, which the majority of local authorities will give out. I would expect all retailers to at least feature the items on a schools list if they are marketing their stationery offer as a Back to School offer.

The list will vary from school to school but usually includes the following product:

Scientific calculator (sometimes Casio fx85GT or fx83GT is stipulated)

Ruler

Maths set including Protractor/ Compasses/ Set square (sometimes Oxford Maths set is stipulated)

Pencil case

Coloured pencils

HB pencils

Eraser

Sharpener

Glue stick

Scissors

Ballpoint pens

Handwriting pen (sometimes Berol handwriting pen or specific fountain pen brands are stipulated dependent on the school)

Students may be targeted over the Back to College period which starts at the beginning of September. However some retailers will combine the two events and then extend the Back To School promotion to run later into September. A student promotion would rely more heavily on filing, A4 project books and study aids such as page flags and markers.

A student shopping list would usually include the products below in addition to the school list above:

A4 refill pad or notebook
A4 ring binder
A4 lever arch file
A4 document wallet
A4 display files
A4 subject dividers
A4 Punch pockets
Highlighters
Sticky notes/ page flags
Stapler plus staples

The office worker will take the opportunity of an increased range in store and an improved value proposition to stock up on stationery. This is likely to be small or home offices as larger offices will use commercial office product suppliers. Copier paper, filing and writing instruments would be popular products.

The bargain hunter: this is the customer who loves a bargain and will see Back to School as a big stationery sale. Retailers will sell high volumes of sellotape for example over the Back to School period. People will stock up, as they see it as a household staple, if they see it is on offer.

The teacher: most schools usually have a stationery budget but a lot of teachers will want to buy their own. Folders, plastic wallets, sticky notes, reward stickers, stars and sticky dots, diaries and planners and coloured pens for marking are all popular purchases.

The stationery addict: it's all about the detail for this customer, quality and having a beautifully designed product are of key importance. They will trade up and shop around to get a beautiful product, which is often driven by a want rather than a need. They will also buy on impulse.

The parent: it's all about crafting, colouring, and activity kits to entertain the kids over the summer holidays. Many a parent is accompanied by a small child and pester power is evident. There is an increasing amount of product on the market targeting busy mums – organisers, family calendars, to do list pads and journals.

Own label product v brands

The use of brands is key in our industry. However, all retailers reviewed also sold own label product. The report will review how retailers use own label and brands as part of their campaigns. Branded price points of over 50 market leading products are listed in the Appendix.

Price and Promotion

The market is extremely competitive at this time of year and price perception is key. The report will highlight pricing and promotional strategies in each retailer.

Operational implementation

Successful implementation in store is a key factor to a successful campaign. If you get it wrong operationally and your launch doesn't go well then it is hard to recover. The sales campaign has to be well communicated to store colleagues, planograms need to be clear and displays need to be easy to replenish otherwise you will end up with empty shelves.

Space and Visual Merchandising

Using space well is key in a sku intensive category such as stationery and making the most of secondary space. Supermarkets will often use seasonal space often termed as 'the power aisle' or seasonal aisle. Specialist stationery retailers will draw customers in with front of store promotions. This report will mainly cover seasonal space and where relevant stationery category range space.

In store theatre and marketing

Choosing your Back to School stationery is a really exciting time of year. With so much competition in the market, retailers have to compete to get their customer's attention and entice customers in. The report will review what tactics retailers are using to get people in to shop with them and the marketing messages behind the POS (point of sale).

Timing

Retailers now time the launch of their Back To School campaigns to coincide with the end of the school summer term. There is usually an initial frenzy of activity where some parents buy stationery for the following school year during the last week of July. This often coincides with parents themselves having time off work and so having the time to go shopping with the children. What products they need replacing is also fresh in the minds of children and parents. Of course some parents will actually be away on holiday during this period or just not that organised. The sales curve usually tends to drop off by the first week of August then ramps up again towards the end of August, peaking during the first week of September. For those customers who are prepared to wait until the end of the promotion they will often get the best bargains at this point in time as retailers mark stock down to clear it through knowing they may lose promotional space in September. Keeping the best sellers in stock up until the end of the promotion and clearing through the tail of the product is always one of the biggest challenges for any retailer. The weather can have an enormous affect on trading at this time of year. When it rains people buy stationery!

Point of difference

It's fair to say that everyone in the market has upped their game over the past 5 years. The quality of product now sold in the supermarkets is now as good as on the high street. It's no longer enough to just have a good Back to School range. The real way to gain advantage over competitors is to have a campaign that ticks all the boxes then to have a point of difference and go one better! This report will analyse who has the USP and point of difference in 2015.

RETAIL REVIEW

The following retailers have been visited and reviewed between Monday 27th July and Monday 1st September 2015:

27/7/15 The Works Leamington Spa
27/7/15 Paperchase Leamington Spa
27/7/15 Tesco Metro Leamington Spa
29/7/15 Tesco Warwick
29/7/15 Asda Leamington Spa
06/7/15 Poundland Stratford Upon Avon
06/7/15 The Works Stratford Upon Avon
06/7/15 Waterstones Stratford Upon Avon
06/07/15 B&M Retail Stratford Upon Avon
06/07/15 Staples Stratford Upon Avon
06/07/15 Asda Living Stratford Upon Avon
06/07/15 Poundstretcher Stratford Upon Avon
06/07/15 WHSmith Leamington Spa
07/07/15 Sainsburys Leamington Spa
07/07/15 Aldi Leamington Spa
08/07/15 WHSmith Priory Square Birmingham
08/07/15 Paperchase Selfridges Birmingham
08/07/15 Smiggle the Bullring Birmingham
08/07/15 Ryman New Street Birmingham
08/07/15 WHSmith Travel New Street Station
10/07/15 Morrisons Leamington Spa
10/07/2015 Waitrose Kenilworth
10/07/2015 Wilkinsons Kenilworth
12/08/2015 Paperchase Victoria Station London
12/08/2015 WHSmith Travel Victoria Station
12/08/2015 M&S Oxford Street London
12/08/2015 John Lewis Oxford Street London
12/08/2015 Paperchase Tottenham Court Road
12/08/2015 Ryman Tottenham Court Road
12/08/2015 Paper and Script Charing Cross Station
17/08/2015 Waterstones Leamington Spa
17/08/2015 WHSmith Leamington Spa
20/08/2015 Lidl Coventry
20/08/2015 Tesco Extra Ricoh Arena
20/08/2015 The Range Rugby
23/08/2015 Sainsburys Local Stratford Upon Avon
26/08/2015 Wilkinsons Rugby
26/08/2015 Poundland Rugby
26/08/2015 99p stores Rugby
26/08/2015 Ryman Rugby
26/08/2015 Asda Rugby
27/08/2015 Sainsburys Leamington Spa
28/08/2015 Aldi Stratford Upon Avon
28/08/2015 Tesco Extra Stratford Upon Avon
29/08/2015 Waitrose Lymington

31/08/2015 99p stores Lymington

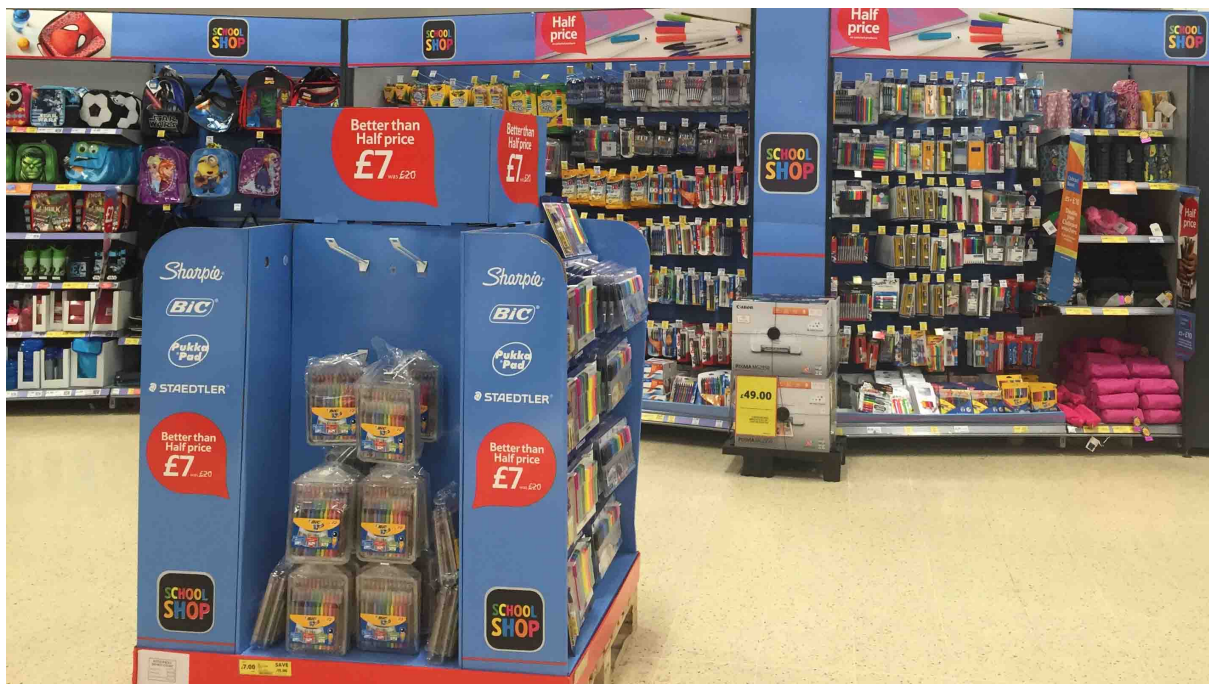
01/09/2015 Tesco Warwick

The report will give detail about the ranges and brands stocked in individual stores based on research carried out in store visits and prior market knowledge. Where certain products are not recorded as being listed please bear in mind this could be due to store compliance or availability.

TESCO

Tesco have over 3500 stores in the UK and research shows they are front of mind, second only to WHSmith when people are considering stationery brands. Their website states their corporate strategy as follows: *'We have strengthened the foundations of the UK business and we are now accelerating plans to deliver the most compelling offer for customers with sharper prices, improved quality, stronger ranges and better service.'*

The largest Tesco store visited was their Tesco Extra Coventry Arena store. 13.5 bays of space were given to Back to School product in the power aisle. In my opinion Tesco had one of the strongest Back to School campaigns this year. The product offer was strong and innovative with a good use of brands and nice own label product. The POS which in previous years has been dull and lacked impact was this year bright and bold with a strong 'School Shop' theme. They had a strong 'up to half price' promotional message and theatre was created in larger stores with the use of pallets and cardboard fixtures. The Back to School offer was being heavily shopped and there was a genuine air of excitement amongst children and adults as they shopped for their stationery.



Use of Space and Visual Merchandising

Space in the power aisle was split as follows:

- Bay 1 Assortment of pens/ accessories/ Pukka notebooks
- Bay 2 Headphones and electricals
- Bay 3 Headphones and electricals
- Bay 4 Lunch bags and bottles
- Bay 5 School bags
- Bay 6 Kids craft and Colouring: Crayola and Tesco Go Create brands

Bay 7	Writing
Bay 8	Writing ½ bay pencil cases
Bay 9	Accessories
Bay 10	Notebooks/ planners/ mid year diaries
Bay 11	Notebooks
Bay 12	Notebooks
Bay 13	Accessories and notebooks

Product was merchandised in the clearly defined sections above. There were lots of opportunities to trade up from Tesco own brand to branded product as all product was merchandised together.

Writing, colouring and accessories were displayed hanging. Notebooks, diaries and filing were displayed in cardboard trays. The majority of lunch bags and bottles were displayed directly onto shelves.

The only negative point was that some notebooks and filing were difficult to shop as they were displayed in cardboard trays. The advantage of this was that you could fit more product out onto the shelves, the disadvantage was that the product slipped down in the shippers and looked untidy and some product was completely hidden.

In addition to the space above there were 3 stationery pallets used for branded pens, colouring and accessories; 1 cardboard fixture for branded filing and 1 quarter pallet stack for paper. The use of pallets created a shop within a shop feel even though product was merchandised in the power aisle.

In addition to the power aisle there were 28 bays of stationery in range space split as follows: (please note the fixtures in this store were wide probably 1.5m)

Filing	2 bays
Paper	2 bays
Fashion	5 bays
Go Create craft	4 bays
Go Create Colouring	1 bay
Crayola branded bay	1 bay
Kids colouring/stickers including 2 rows of Bic kids	1 bay
Colouring/ Activity Books/ Licensed stationery	1 bay
Writing	4 bays
Accessories	3 bays
Post	1 bay
Notebooks	2 bays

Point of Sale

This year's Back to School POS colour was a warm blue colour with school shop branding in rainbow colours on a black 'blackboard' background. The blue POS was used for all backboards, shelf edge strips, fins and cardboard fixtures including pallets.

Supplier logos were used on pallet POS in white text on the blue background from Bic, Sharpie, Staedtler, Oxford, Pritt, Sellotape, and Scotch. Pricing messages including 'up to half price' stood out as they were white text on a red background. Half price red shelf strips were also used. Price tickets were white for full price items and yellow for discounted items. Photographic POS was used on fins and header boards. Clubcard boost was also advertised on the bottom of some fins.

Promotions

The main promotional message was 'up to half price.'

The focus was on trading people up to larger pack sizes or bundles rather than multibuy. The exception to this was a 2 for £6 deal on HP Everyday Printer Paper.

The following bundle packs were on sale:



Pukka notebook and filing collection Was £20 now £7 (containing A4 and A5 jotta pad, reporters notebook, lever arch file, presentation display book and 25 punched pockets).

Tesco Handy x4 lever arch files
Half price £8 to £4.

Oxford Campus essentials bundle £20 (containing A4 wiros notebook, 300page refill pad, A5 wiros notebook, A4 ringbinder, 30 punched pockets, 10 part dividers).

Staedtler stationery set Was £20 now £7 (containing 8 Noris pencils, colouring pencils, 2 erasers, sharpener, ruler, coloured ballpoint pens and 4 highlighters)

Sharpie 28 permanent markers Was £20 now £7

Bic Kids bumper pack Was £20 now £7 (containing 2 x 12 Kids couleur, 2 x12 Evolution, 2 x 12 Plastidecor).

Bic mixed mega pot Cristal pens £10

Pilot Frixion 3 pack with notebook £8

Pilot Frixion filled pencil case Save £2, now £8 (containing 2 Frixion rollerballs, 3 refills, 1 Frixion highlighter)

Scotch essentials bumper pack £5

Oxford filled pencil case Half price Was £10 now £5.

Pentel essentials collection (stationery set) Half Price Was £8 now £4

Staedtler Noris pencil set (10 pencils, Eraser and Sharpener) Half Price Was £3 now £1.50

Product

The Tesco product offer definitely had a strong emphasis on bundles and multipacks as already detailed. The amount of multipacks and the discounts offered did mean that they stood out from competitors both in terms of a value offer but also on product offer. They had some exclusive product such as the Pukka notebooks and filing collection and were first to market amongst supermarkets for new products such as the Oxford Campus new filing range.

Paper

The main paper brand promoted in the power aisle for Back to School was the HP Everyday printer paper which was priced at £4 individually or 2 for £6.

Writing

Out of 14 rows of writing product across two bays three rows were given to Tesco own label product. The remainder of the space was used for writing brands with product being blocked by brand. Generally, ballpoints were zoned on the left of the fixture and rollerballs on the right in the first bay. Bic was the most prominent brand. In the second bay of pencils, markers and highlighters Staedtler was the most prominent brand. The general trend across pens and pencils was towards larger pack sizes in both own label and branded product.

Colouring

Crayola was the main brand supported in the Power Aisle with three shelves of product, merchandised in a bay with Go Create craft and licensed kid's stationery. There were also Bic Kids Visa felt tip pens and Staedtler Noris colour pencils in the range in addition to Bundle packs. There was very little Tesco Go Create colouring in the Back to School range although they do give it a lot of space in core range space.

Accessories

Accessories were merchandised by type then brand. There was generally a good mix of Tesco own label and branded product across all areas. The following best selling back to school

products were dual sided: Casio fx 85GT calculator, Helix Oxford Math set, Pritt stick 3 x22g pack.

There was half a bay of pencil cases - 15 options. 3 options were licensed (x2 Frozen, x1 Despicable Me) and the others were all Tesco own label, all priced under £4. Designs included donuts, tetras, floral, melon, butterfly, unicorns, skulls, monster trucks and pirates as well as plain coloured black and pink nylon barrel shapes.

There were no stickers on display in the Back to School range.

Filing

There was a limited range of filing located in the Power Aisle in this store with the offer focusing on branded ringbinders and lever arch files from Pukka and Oxford Campus.

More filing was on display in the Tesco Warwick store I visited and the range included essentials from the Tesco File range: black Tesco ringbinders and lever arch files, Tesco file dividers, Tesco punch pockets, Tesco polypro popper wallets and expanding files. Handy branded brightly coloured document wallets, display books and expanding files were also being sold. Considering the volume indexes, dividers and punch pockets will generate at this time of year I thought the filing range was under spaced in Tesco.

Notebooks and Pads

There were four types of notebooks in Tesco's Back to School Range. A selection of Tesco own label products from their Notebook range including black soft touch notebooks, bright pink and black plain coloured polypro wiwi notebooks and project books. Secondly there were own label brightly coloured books and pads in purple, black and pink colours strongly branded as Handy range. Thirdly there were brightly coloured exclusive Pukka Pad notebooks in pink, black, green and blue with matching filing. There were also Pukka scratch and sniff scented products. Finally, there was Oxford Campus product.

Diaries and Planners

Tesco had a really nice range of mid year diaries and family planners targeting mums. There was a range of product ranging in price from £1.25 to £14. The range included week to view black diaries, polypro designs which matched back to Tesco fashion ranges, an Oxford Campus Diary and 16 month family planner calendars. There was also a top tier mum's school year diary priced at £14 - a great product marketed as the essential family diary that fits in your handbag.

Lunch bags/ School bags and Licensed Stationery

The lunch bag and bottle range was mainly made up of licensed product. There were two shelves of Polar Gear plain coloured blue and pink snack boxes, bags and bottles.

Licensed lunch bags and bottles were across four shelves and featured the following brands: Disney Princess, Tesco Owl, Star Wars, Tesco football, Minions, Spiderman, Hulk, Tesco monster, Frozen, Olaf, Avengers. There were 11 options of design lunchbag and 8 options of design bottles. There were 16 options of school bags. 7 of these featuring designs - Star Wars, Marvel Frozen and Minions brands. The remainder were plain coloured ruck sacks and gym bags, 1 is Nike branded and 1 is Dunlop branded.

Lunch bag licensed price points were between £4 and £10.

Licensed school bags were priced under £9.

There was one shelf of licensed stationery featuring Frozen, Despicable Me and Star Wars product (notebooks, pencil cases, and pens) all priced under £3.

Brands

The following brands were stocked in the Back to School range at Tesco in addition to Tesco own label:

Paper	HP Everyday Printer Paper
Writing	Sharpie fine/ Neon/ Electro pop/ Whiteboard Markers/ Laundry pen/ Sharpie Flu XL/ Fabric markers Papermate Inkjoy Papermate Flexigrip Papermate Mates pencils Papermate Non-stop mechanical pencils Berol handwriting pen Replay Zebra Zgrip/ Zgrip funky/ Zgrip selection pack Pilot Frixion Pentel Energel, Pentel n850 marker Pentel essentials collection Bic Cristal Bic Cristal Grip Bic soft feel clic grip Bic 4 colour original Bic retro collection Bic Cristal 50 pack Bic Brite liner Uniball TSI Uniball Eye Staedtler Triplus fineliner/ Triplus roller Staedtler Textsurfer Staedtler Noris pencils Staedtler stationery sets Staedtler Ergo soft coloured pencils
Colouring	Crayola Bic Kids Staedtler
Accessories	Pritt – rainbow/ pink/white Blu tack standard/ pink Blu tack glu pen Blu tack glu dots Scotch

	Sellotape
	Tipp ex
	Casio calculators
	Helix Oxford maths set
	Helix Oxford erasers and sharpeners
	Maped erasers and sharpeners
	Rexel staplers
	Post it notes
Filing	Pukka
	Oxford Campus
Books and Pads	Pukka
	Oxford Campus

Fashion Stationery

Only one shelf of design fashion product was actually merchandised in the power aisle. However, Tesco have 5 bays of fashion ranges in their core range with the following themes: Cats/ Hearts/ Crazy bird/ Vintage Rococo/ 50s Geo/ Spots/ Little rain cloud. These ranges predominantly featured notebooks and filing.

Novelty Stationery

There was very little novelty stationery featured as part of the stationery range either for Back to School or in core range. There were some brightly coloured Tesco push pins, magnets and oversized paperclips.

One final thing that Tesco did which reinforced the message of the campaign was to have a Back to School Checklist in store. There were also leaflets featuring the Back to School checklist on one side and the 'Better than half price – was £20, now £7,' Bundle deals on the back. This leaflet also included a voucher to 'Spend £5 or more on Stationery in store at Tesco and get £1 off between October and December 2015.'

ASDA

Asda now has over 525 stores and their website states that, *'Our aim is to offer Britain's best value weekly shop with prices that are independently shown to be lower than our main competitors, and with an excellent mix of fresh food, grocery, clothing, home, leisure and entertainment goods.'* They have struggled in the current market conditions, where they are competing not only with the other 3 of the 'big 4' but also with Aldi, Lidl and other high street discounters who share a similar demographic to Asda.

Asda are known in the market for having some exciting Back to School displays and going all out on creating theatre. Their core strategy is focused on the family and so this is an important time of year for them and they run a large marketing campaign including in store licensed POS, banners and floor stickers, Asda in store and local radio advertising, local leaflet drops and car park banners.

This year's POS scheme was similar to last years with the use of bright colours – both on product and POS.



Use of Space and Visual Merchandising

I visited three Asda stores over the back to school period and they all had a slightly different approach. The first store in Leamington had a seasonal aisle which was very hard to find, was cramped to shop and very untidy. The second store was an Asda Living store in Stratford Upon Avon, which had a better Back to School display, which will be detailed in this report. Lastly I visited their Rugby store which had a traditional power aisle set up, with lots of hanging POS displaying Back to School Offers. Supermarket stores had full height product displays and the Asda Living Store had mid-tier fixtures, this equated to 14 bays of Back to School product in the Asda Living store and 10 bays in the supermarket stores visited. Generally, I found the visual merchandising confusing with product largely merchandised by colour or offer rather

than similar product being together. Some of the fixtures felt cluttered and difficult to shop. It was sometimes difficult to find the essential back to school items from the Back to School list as there was so much going on and so many own label products. For some products it would have been necessary to visit the store's stationery range space as well to get a full range of product.

Space was split in the Asda Rugby Store as follows:

- Bay 1 Writing and Bic kids colouring 2 for £3 promotion
- Bay 2 Writing/ Accessories/ Colouring
- Bay 3 £1 bay - Asda stationery set, highlighters, pens, kids colouring and pick n mix
- Bay 4 Filing/ diaries/ pencil cases
- Bay 5 Filing/ notebooks (Asda/ Nu/ Pukka)
- Bay 6 Nu coloured filing and notebooks/ Lunchboxes
- Bay 7 Nu coloured filing and notebooks/ Lunchboxes
- Bay 8 Sistema Bottles and snack boxes
- Bay 9 Schoolbags
- Bay 10 Schoolbags

In addition there were additional fstdus sited for Casio fx83GT calculator, 2 for £3 Papermate pens, Minions licensed stationery and games, and Bic pens. There was a whole stand in the Rugby store dedicated to kids' personalised stationery sets, bags and bottles in prime selling space at the front of the store.

Point of Sale

The key message of the Asda POS this year was 'One stop School Shop.' The main logo of the campaign featured a school crest with a white background, yellow outline and coloured writing. The surrounding graphics were black with coloured geometric shapes. Promotions were highlighted in the crest shape with a red background, yellow outline and yellow text.

Promotions

There was a 2 for £3 promotion on branded writing products, an Asda own label £1 bay and some rollback pricing on individual items.

Product

Overall in addition to the POS it was the colour of the product that created the impact in this campaign, with a colourful product statement created by Nu notebooks and filing in pink, green and blue as you walked into store.

Paper

Paper was sold from range space and the most amount of space was given to Asda own label copier paper.

Writing

Writing was merchandised hanging in Back to School space and displayed by brand, which did create impact. Because some items were included in the 2 for £3 promotion and some weren't the display was however a little confusing and disjointed. In addition some brands were only displayed in stationery range space. There was a mixture of pack sizes but no

branded writing bundle packs. There was a large selection of Asda own label writing and colouring products in large pack sizes and bright colours, all priced under £5.

Colouring

There were 6 items of Bic Kids product, ranged as part of the 2 for £3 promotion. There were 5 Crayola colouring products displayed underneath accessories, not on promotion.

Accessories

There was a small range of branded accessories in the Back to School space from Helix and Casio, Westcott scissors and Pritt stick. However, most accessories in this range were own label focussing on the cheaper pick and mix items. The range was quite difficult to shop as it was low down and the shelves were close together. Product was merchandised in either cardboard or acetate fsdus or acrylic tubs.

There was a nice range of pencil case designs for both boys and girls, mainly from fashionstationery.com.

A larger range of glues, tapes and other accessories was available in range space.

Filing

The filing offer focused on Asda own label and Nuco branded files which had matching notebooks. Subject dividers, popper wallets, expanding files, punch pockets were mainly Asda branded with two options from Elba range in the BTS space. Own label filing was among the cheapest in the market with Asda ringbinders for 50p and Subject dividers for 30p.

Notebooks and Pads

Pukka designs were navy and a new neon coloured design available in pink, purple, blue and orange colours.

Nuco Era had a nice range of matching notebooks and rollbound ringbinders and lever arch files. The notebooks were both block coloured polypro in pink/green and blue colours or casebound striped notebooks. There was a matching Asda silicone notebook and accessories range merchandised on the shelf underneath.

Nu Craze A4 striped notebooks were part of the 2 for £3 deal.

Diaries and Planners

There was one shelf of Collins casebound diaries – a mixture of black and patterned designs.

Lunch bags/ School bags and Licensed stationery

A whole bay of space was given to Sistema snack boxes, water bottles and lunch boxes in pink, purple, blue, green and black colours.

The following licenses were sold in the school bags and lunch bags category:

Avengers, Ultimate Spiderman, Angry Birds, Jurassic World, Star Wars, Teenage Mutant Ninja Turtles, Minions, Olaf, Frozen, Cinderella, Disney Princess, My Little Pony, Hello Kitty.

The Asda living range also had a nice range of George satchels and school bags. Price points on George product started at £3 for a swim bag up to £10 for a pu satchel.

There was a small range of 10 options of licensed stationery focused on stationery sets, pencil cases and A5 notebooks, which included Avengers, Minions and Frozen licenses.

Fashion Stationery

Apart from a few Asda coloured notebooks fashion stationery did not form part of this offer.

Novelty Stationery

Novelty stationery formed part of the £1 bay, which included small accessories including animal, puzzle and football erasers, mini calculators and mini heart sticky notes.

There were more craft items and Scentos products in range space, along with large sheets of stickers.

Brands

In addition to Asda own label the following brands were sold in Asda:

Paper	In stationery range space: HP Everyday printer paper, Xerox Premier, Asda Logic paper
Writing	In BTS space: Papermate – Inkjoy (100, minis, 300RT)/ Flexigrip/ Nonstop mechanical pencils/ Mates Sharpie permanent markers and Fluo XL Stabilo Boss minis Pilot Frixion Uniball Eye 157, Uniball Eye micro, Uniball Signo, Uniball Signo 207, Uniball TSI
	In range space: Parker Stabilo Boss, Boss mini heroes, Flash highlighters Staedtler triplus colour/ Noris/ Woodless pencils
Colouring	Bic Kids, Crayola
Accessories	In BTS space: Casio/ Pritt white/ Tipp-ex Helix Oxford maths sets, erasers, rulers
	In stationery range space: Loctite Bostik all purpose glue/ Blu tac/ Blu tac glu dots Pritt tube/ power/ rainbow Sellotape Scotch magic tape/ double sided tape Post it notes
Filing	Nu and Pukka in BTS space Elba punch pockets and display books.
Books and Pads	In BTS space: Nu and Pukka In stationery range space: Oxford Campus

SAINSBURYS

The biggest change in promotional campaign this year has been at Sainsburys. Sainsburys now has over 1200 supermarkets and convenience stores and has reacted strongly both to the Which? pricing report and customer research. They now price match to just Asda not Tesco and their new approach to pricing is stated as follows on their website:

'For our customers, quality and price are both important in the value proposition. Our new pricing strategy of regular lower prices reassures customers that they can always get a good price at Sainsbury's. Customers have responded positively to clearer, simpler pricing as we continue to adopt lower base prices for products not on promotion.'



Use of Space

This year's Back to School stationery offer is smaller than in previous years with a reduction in space for stationery from 8 bays to 5 bays in the largest stores. This has given more space to school uniforms.

The space breakdown in Seasonal space is therefore as follows:

Bay 1	School Uniform
Bay 2	School Uniform
Bay 3	School Uniform
Bay 4	School Uniform
Bay 5	School Bags
Bay 6	Lunch bags
Bay 7	Lunch bags
Bay 8	Stationery – Writing
Bay 9	Stationery – Accessories
Bay 10	Stationery – Books and Pads

Bay 11	Stationery – Fashion notebooks and diaries
Bay 12	Stationery – Filing
Bay 13	Technological accessories
Bay 14	Books and Learning

In addition to the space above, another summer holidays campaign runs from July to 19th August. This campaign featured three bays of kids' art and craft product but obviously missed the peak Back to School selling weeks. The promotions were continued in range space. Space in the Summer Sorted campaign was split between toys, books and stationery. The three bays of stationery were split as follows:

Bay 1	Stickers and Paints
Bay 2	Get Creative
Bay 3	Colouring and Craft Papers

In addition there was a colouring and activity book fsdu, a Bic bus, Papermate pens and an Oxford Campus fsdu.

In addition to the Seasonal Aisle displays there was a large stationery range where the space was split as follows:

Paper	1.5 bays
Writing	2 bays
Kids art/ craft and colouring	6 bays
Accessories	1 bay
Filing	2 bays
Books and Pads	2 bays
Licensed	1 bay
Fashion	3 bays
Post	1.5 bays

Visual Merchandising

Product is displayed in clear product statements. Across the range notebooks, filing and accessories were displayed in cdus. Writing was displayed hanging – a first for the Sainsburys seasonal aisle. Lunch bags and bottles were displayed directly onto shelf and school bags were displayed hanging. The majority of craft products were displayed in cdus. Cdus were either by Sainsburys, Get Creative or supplier branded.

Point of Sale

Sainsburys went for a dark green POS colour scheme this year with white writing. There was no branded POS in the stores I visited and the emphasis was very much on photographic POS of kids wearing Sainsburys' school uniforms. A hanging cloud shaped piece of POS said 'Made to Last' reinforcing the quality message. There was only general navigational POS eg. Stationery/ PC accessories and the range would have benefitted from more specific POS or photographic POS in each bay.

Overall the POS was a little serious and did not really help to create any theatre.

Promotions

Up until the 19th August the Back to School range did not feature a promotion. From the 19th August the majority of product was discounted with a 25% off promotion across stationery, lunch bags and school bags. This fits with Sainsburys' strategy to have lower everyday prices and less aggressive promotions.

Product

There was a somewhat safe Back to School range on sale in Sainsburys this year, which in my opinion lacked impact.

Paper

HP Everyday printer paper was backed again this year as the key Back to School copier paper line but was displayed in Seasonal space with technology product.

In range Xerox and Pukka copier paper are also sold along with Sainsburys' Basics and Multipurpose paper and other HP paper formats.

Writing

The Sainsburys' Back to School writing offer focused on best selling own label product, the top GFK sellers from 2014 plus new product to market such as Staedtler coloured ball pens and Uniball TSI erasable pens. As such there was some duplication of product as product is displayed in various pack sizes eg. Bic Cristal 4 pack and 10 packs. Own label writing product provided either an entry price point or the same price point but bigger pack size to its branded alternative.

Colouring

A row of kids colouring (2 options Get Creative and 8 options Crayola) was merchandised at the bottom of the writing display. More Get Creative kids colouring was ranged in the Summer Sorted space but this came off sale on the 19th August.

A whole bay of Crayola product and a shelf of Maped colouring product was also displayed in range space. Most of the Crayola bay was also part of the 25% off promotion. Three Maped items Mini Colorpeps, Colorpeps smoothy and Maped Plasticlean were reduced to clear in range space.

Accessories

The Accessories range featured a good split of own label and branded products and a good overall mix of stationery products. Everything on a school list but also extras such as sticky stars and reward stickers. A shelf of mainly licensed stickers was displayed in the Summer Sorted craft range.

There were two shelves of pencil cases with price points varying from £1.50 for a clear pencil case to £4 for a licensed pencil case. Most pencil cases were own label featuring a range of designs including dinosaurs, skulls, stars, butterflies, bicycles, owls, florals and puppy dog. Two options were licensed – Minions and Marvel.

Filing

With the exception of one Pukka filing bundle pack (featuring a lever arch file, refill pad and file dividers) all of the filing ranged in seasonal space was Sainsburys' own label. There was a

mixture of plain black coloured filing paper on board ringbinders and lever arch files and pp document wallets, popper files and expanding files in navy/lilac and mint colours. There was also matching fashion design filing and notebooks.

Core filing products such as punch pockets, file dividers, and manila wallets were displayed at the base of the fixture. Initial non promotional pricing for filing was priced at round price points £1/ £1.50/ £2 or £3.

Within range Sainsburys stock other filing brands including Pukka, Elba, Snopake and Exacompta. The Elba product was on promotion towards the end of August at 25% off.

Notebooks and Pads

This year Sainsburys have backed Pukka navy design with 2.5 shelves and Nu Varsity range with a shelf of product. The Nu product is a new brand for Sainsburys and has been located straight away in premium selling space. Sainsburys have also increased their range of own label notebooks in Seasonal space as all Sainsburys' product has been relaunched in new *by Sainsbury's* packaging this year.

Within range Oxford Campus notebooks were also promoted with 25% off.

Diaries and Planners

There was one shelf of mid year diaries branded as by Sainsburys. The range was a mix of plain black, block coloured pp and printed paper designs to match fashion notebooks. Non promotional price points ranged from £3 to £6.

Lunch bags/ School bags and Licensed Stationery

Compared to other retailers a large proportion of Back to School space was given to lunch bags and bottles. However, Sainsburys did have one of the best lunch bag ranges with some cool brands and innovative products. What I liked about this range was the variety of product from plain coloured Nude food branded snack boxes, sandwich boxes and lunch bags, to simple Sainsburys' designs featuring stripes, stars and floral designs. There was a large licensed range featuring Disney Princess, Frozen, Olaf, Minions, Avengers, Jurassic Park, Spiderman and Star Wars brands. Then there were some cool top tier Satchels and Smash branded lunch bag and bottle combinations. Before the promotion own label design lunch bags were £4, licensed lunch bags were £8-£10 and top tier satchels and Smash products were £10-£12 so more expensive than other supermarkets but the range was of a higher specification. The school bag range wasn't quite so impressive and featured 14 options. There were licensed backpacks priced at £7.99 and £9.99 for younger kids Thomas, Minnie, Frozen, Avengers and Spiderman licenses. For older girls there were coloured satchels and for older boys Gola and Dunlop branded bags all priced at £19.99. Overall the school bag offer was a little disappointing especially for older children.

Apart from two pencil cases this year licensed stationery was omitted from the Sainsburys' Back to School range. There is a full licensed stationery bay in range which supports the following licenses: Star Wars/ Marvel/ Despicable Me/ One Direction/ Frozen/ Disney Princess.

Fashion Stationery

This year's Back to School fashion offer was focused on notebooks and filing. It featured the following designs: stars, stripes, floral, bicycles, butterflies, block colour polypro. Overall the offer was quite grown up and not as targeted at tweens and teens as it has been in previous years.

A further three fashion ranges were featured in range space.

Go Stationery fashion product was displayed on a concept store table in the Leamington store including their Give a Hoot range which although more expensive (all items were between £2 and £6) filled the gap of a more fun character range for Back to School.

Novelty Stationery

There was a distinct lack of fun and novelty product in the Sainsburys' Back to School range.

Brands

The following brands were ranged in the Back to School seasonal aisle:

Paper Writing	HP Everyday printer paper
	Sharpie fine markers
	Berol coloured markers
	Berol handwriting pens
	Stabilo boss
	Stabilo neon markers
	Stabilo point 88 fineliners and point 88 minis
	Staedtler coloured ballpens
	Bic Cristal original
	Bic Cristal Grip
	Bic Cristal Colour
	Bic Cristal Original
	Bic 4 colour Grip
	Zebra ZGrip
	Zebra Funky
	Zebra rapid dry
	Papermate flexigrip
	Papermate Inkjoy
	Pilot Vpen
	Pilot FriXion
	Pentel energel
	Uniball Eye 157
	Uniball Eye Needle
	Uniball super ink marker
	Uniball TSI
	Staedtler Noris pencils
	Bic Ecolution pencils
Colouring	Crayola
Accessories	Tippex
	Pritt – rainbow/ white/ pink
	Sellotape

	Blu tack
	Casio calculator
	Post it
	Maped stapler
	Maped hole punch
	Maped Zenoa scissors
	Maped compass/ protractors/ flexi rulers/ Kids grip ruler/ Zenoa
	erasers/ Duo sharpeners/ twist and flex geometry sets
	Helix Oxford geometry sets and maths sets/ sharpeners
Filing	Pukka Pad Bundle pack
Books and Pads	Pukka Pad, Nu Varsity

MORRISONS

Morrisons now have 500 stores and 150 Morrison locals. Their website states the following about their strategy: *'We have developed a strategy based on our view of how the market has changed and how it will continue to evolve; of what appeals to our customers now and what will be important to them in the future.... With competitive, permanently low prices and our price matching facility, we are committed to helping our customers save money every day.'*

I visited one of Morrisons' biggest and newest stores in Leamington Spa. The Back to School offer was hard to find situated towards the back of the store, it could easily have been missed.

Use of Space and Visual Merchandising

The store visited had 4 bays of stationery in range space and 5 bays were given to stationery in the seasonal aisle next to 7 bays of school uniform. Unfortunately, a clearance bay was situated between school uniform and stationery, which spoilt the adjacency. All product in the range was merchandised in cdus either supplier branded or Morrisons' branded.

Space was split as follows:

- Bay 1 Licensed Stationery
- Bay 2 Writing – 4 shelves
 - 1 shelf pencil cases and accessories
 - 1 shelf kids colouring
- Bay 3 Filing and notebooks
- Bay 4 Notebooks and filing
- Bay 5 Accessories, paper and printers



Point of Sale and Promotions

Morrisons had quirky Back to School signage featuring a pink and blue Back to School crest on a white background and a photographic image of a girl with a pencil in her hair and a pencil as a moustache. They also used photographic POS to highlight offers such as ½ price Bic Cristal pens for £1.50 and a Sharpie laundry pen for £1.50. Unfortunately positioning of the fins covered the actual product. Where product was discounted some red and white save shelf

edge labels were used and some red and white reduced to clear labels. There was not an overarching promotional message, just selected reductions. Morrisons is generally however very competitive on pricing and usually has some of the cheapest own label stationery in the market.

Product

There was lots of duplication in the Back to School range from the main range of stationery. However overall it was a solid core offer if a little dull. Morrisons did use the space a little differently to other retailers giving a lot of space to licensed stationery.

Paper

The only paper in the range was Morrisons' own label multipurpose paper and there was no branded alternative.

Writing

Branded pens were displayed across 3 shelves and were blocked by brand with the most space – 1 shelf being given to Bic. Half a shelf was given to Zebra, half a shelf to Papermate, with the remaining space split between Berol, Stabilo, Helix, Sharpie and Pilot. A full shelf was given to Morrisons' branded writing instruments. In range space Staedtler and Parker brands were also backed.

Colouring

The main brand backed was Crayola with one option from Maped.

Accessories

Two thirds of the accessory range was Morrisons' own label product, the other third was made up of branded glues and school product from Helix Maped.

Filing

Three shelves were given to Morrisons' core filing product which included: polypro expanding files, ringbinders, popper wallets, clip files and display books all sold in single units, packs of subject dividers, punch pockets, report files and plastic wallets and manila document wallets. Black elasticated wallets and paper over board black and red ringbinders.

The only branded filing item was a Nu filing bundle pack.

Notebooks and Pads

The notebook range was made up of plain black Morrisons' branded notebooks at entry price points, Nu multipacks (twin pack Nu Era and 3 pack Nu Craze exercise books) and Nu Era polypro study books. The range also featured Pukka Navy wire notebooks and project books.

Diaries and Planners

There was one black Morrisons branded Academic Diary on sale.

Lunch bags/ School bags and Licensed stationery

Out of all the retailers Morrisons gave the most Back to School space to licensed stationery and the most space proportionally of their range to licensed stationery.

They split the space as follows between the licenses:

Shelf 1 – Star Wars – notebooks, coloured pencils, novelty pens and stationery sets. Three items on this shelf had reduced to clear POS against it.

Shelf 2 – Avengers – notebooks, eraser set, pen set, pencil case and filled pencil case.

Shelf 3 – Frozen – lunch bag, notebook, pencil case, multi-coloured pen, stationery set.

Shelf 4 – Despicable Me – lunch bag, notebook, pen set, multi-coloured pen, stationery set, pencil case.

Shelf 5 – School bags – Morrisons' own back pack – black and pink options, Despicable Me mini backpack, Frozen mini backpack priced at £8.

There was also a separate stand of Sistema sandwich boxes in another aisle.

Fashion Stationery

There was a small selection of Morrisons' own label spots and teardrop designs available on ringbinders, A5 wire notebooks and A4 project books.

Novelty Stationery

There was no novelty stationery on sale in the Morrisons store visited.

Brands

Paper	Morrisons' multipurpose paper
Writing	Berol handwriting, Sharpie laundry, Sharpie permanent markers Papermate non stop mechanical pencils, Flexigrip, Inkjoy Helix whiteboard markers Stabilo Boss, Point 88, Sensor, Write all Pilot V5, Frixion Bic Cristal, Cristal Fun, 4 colour, Soft feel Clic Grip, Zebra flight, Funky, Z-Grip, Zebra selection pack
Colouring	Crayola, Maped Colorpeps
Accessories	Tippex, Casio, Pritt, Blu tack, Bostik all purpose glue, Loctite super glue, Maped study compass, Helix Oxford Maths Set, Maped boogy sharpener, Maped Eraser.
Filing	Nu Filing Bundle pack: Lever arch, refill pad, 10 part dividers.
Books and Pads	Nu Craze Nu Era

WAITROSE

Waitrose now has over 322 stores in the UK, making it the sixth largest grocer. It has fared well in the recession, differentiating itself on product quality and service, investing in price cuts and bringing out a range of Waitrose Essential items. They price match to Tesco on 8000 branded products and last year lowered prices on over 1600 own label products. Mark Price, Managing Director of Waitrose describes current market conditions as 'brutal' on the johnlewispartnership.co.uk website.

Waitrose are not a big player in the Back to School Market. They have two bays of stationery in the store I visited in Lymington, some of which was promoted on a 25% off promotion.



Product

There was a concise range of stationery, a good mix of product for the target Waitrose customer split as follows:

Social Stationery – half a bay, made up of notecards, list pads, and licensed notebooks – National Trust and Hello Kitty.

Notebooks – 2 shelves, mainly made up of Essential Waitrose notebooks. However there were also some Pukka black polypro business notebooks.

Fashion – one shelf of notebooks and filing in a red and white polka dot design.

Writing and Accessories – half a bay, all branded focusing on essential stationery.

Kids stationery – One shelf of Gant colouring and a Peppa Pig notebook, pencil case and stationery set.

Brands

Paper	Xerox Performer
Writing	Zebra Z Grip, Zebra Cadoodles pencils, Metallic Gel Pen Uniball Eye 157, Signo gel grip, Signo 307, Super Ink Marker, Uniball Eye Needle, Uniball TSI, Uniball Insight Pilot V5 Papermate flexigrip Staedtler Noris pencils Stabilo Boss highlighters Helix Oxford Stationery Set
Colouring	Galt colouring
Accessories	Texet calculator, Rapesco stapler and staples, Maped hole punch, Maped Zenoa scissors, Maped folding ruler, Maped Technic erasers, Maped double pencil sharpener Tippex, Scotch tape, Scotch glue sticks, Scotch super glue, Loctite glue, Sellotac, Helix pencil case
Filing	No branded filing
Books and Pads	Pukka black polypro business

JOHN LEWIS

John Lewis have 44 department stores across the UK. Their website states: *'Our Commitment on quality, price and service remains the lynchpin of John Lewis promise.'*

I visited their Oxford Street Store in London. The Papershop department is located in the basement of the store and has a lovely eclectic feel to it.

The main advertising of their Back to School campaign was *'we've got everything on the list.'* This campaign was primarily focused on school uniform, however window displays featured both school uniform and stationery so I was interested to see if this claim was also true for stationery.



Use of Space and Visual Merchandising

The Papershop department in the Oxford Street Store feels like a shop within a shop. Tables and metal fixtures with stylish wooden tops create an upmarket feel to the department. Customers are enticed in with colourful displays of product. Essential stationery is displayed at the back of the store. Generally, the essential stationery was not as well merchandised as the fashion stationery, with gaps in the accessories range and prices missing in the writing category. A specific Back to School pens and accessories unit was pulled together with POS above saying 'Back to School, We've got Everything on Your List.'

Point of Sale

The Back to School POS was in very simple type on a blue background. Window displays and store menus featured images of children in John Lewis school uniform carrying books and notebooks.

Promotions

Most product was not on promotion.

POS stated that some products from the following pen brands were on a 20% off promotion: Stabilo, Parker, Berol, Sharpie and Uniball. However, it was not clear which products were and were not included in the promotion.

Product

The John Lewis stationery offer is primarily focused on gift stationery with large range of social stationery and fashion stationery – both own label and licensed collections.

Writing, Accessories and Colouring

The writing and accessories offer was very brand heavy, however there were a limited number of brands. Bic was not stocked and there was very little Papermate product, which meant they were under optioned on ballpoint pens versus the rest of the market and over optioned on rollerball pens. Almost a whole bay was given to a wide range of Stabilo product including colouring. A range of Maped and Staedtler colouring product was also sold but the market leaders Crayola and Bic Kids were not on sale.

Notebooks and Filing

Standard notebooks were mainly John Lewis branded, with a few business notebooks from Pukka. They had a disappointing range of core filing.

Diaries and Planners

There was a big display of family calendars, organisers, mid year diaries and aspirational notebooks. There was also a large display of correspondence social stationery, photo albums, and Filofax.

Fashion and Licensed Stationery

Much of the product offer was focused on fashion and licensed stationery. The following were own label John Lewis designs: Monsters, Owls' Tea Party, a blue range with red and white spots and flowers.

Branded fashion stationery was as follows:

Kate Spade, Tinc, House of Holland, Caroline Gardner, Orla Kiely, Happy Jackson, Mr Men and Little Miss, Peanuts, Gruffalo, Knock Knock, Abigail Warner, Emma Bridgewater Blue Collection, Hello Kitty, Cath Kidston, Rachel Ellen, the Art File, Busy Bee, Sloane Stationery, Paperblanks, Castelli, Go Stationery.

Novelty

There was a whole table dedicated to novelty products and single pens. Product was from NPW, Mustard, the Art file, Talking Tables, Caroline Gardner, Knock and Knock and Suck UK.

Brands

Paper	Copier paper was not on sale in this store
Writing	Stabilo (range included pencils, colouring, point 88, Boss, Festival, Smartball) Uniball Eye micro, Gel impact, Eye Designer, Eye Needle, Vision Elite, TSI, Kuru Toga, Signo gel grip, Super Ink Marker. Pilot Frixion, Frixion highlighters, drawing pen, G2, V5, laundry marker, Begreen Rollerball, G-tec Maica, Pilot MR Zebra Sarasa Metallic, Z Grip Berol handwriting Maped fluo highlighters Staedtler Triplus ball, Triplus fineliner, Neon pencils, 430M ballpoints.

	Underglass writing brands included: Parker, Waterman, Sheaffer, Diplomat, Caran d'Arche, Yard O'led, and Cross.
Colouring	Stabilo, Berol, Maped – Color Peps, Duo Colorpeps, Smoothy, Staedtler - Noris Lumocolor, Noris Club, Ergo soft,
Accessories	Maped – erasers, sharpeners, staplers, hole punch, rulers, maths set, scissors, Helix pencil case, maths set, elastic bands, Pritt, Sellotape, Casio calculator, Papermate correction fluid, Pukka page markers
Filing	No branded filing
Books and Pads	Pukka black polypro business notebooks

PAPERCHASE

Paperchase now have 130 stores in the UK (including concessions) and have built up a reputation for exciting and innovative design-led stationery. Their back to school offer always focuses on new fashion stationery collections and this year is no different with 4 new fashion stationery ranges: Pony Party, Monster Mash up, Hashtag and Wild Aztec. In addition to fashion stationery they run a 3 for 2 mix and match promotion across branded and essential stationery.

Use of Space and Visual Merchandising

The newest fashion collections and the 3 for 2 offer are always displayed on tables at the front of the store. An acrylic small accessories and single pens unit and extended height fixture are used over the Back to School period to enable a variety of 3 for 2 product to be merchandised together.

Point of Sale

Paperchase do a great job of combining photographic retro images and graphics or characters from their ranges to create humorous and eye catching window displays. This year's windows featured unicorn toys and cartoon monsters at old fashioned school desks. Back to School branding was in orange. The POS for the mix and match 3 for 2 promotion was orange with black text. This colour scheme was also carried through to their website.

Promotions

This year's 3 for 2 promotion was the biggest yet and included a wider range of essential stationery product from around the store. The 3 for 2 promotion included the following product:

Post it super sticky notes, Helix Oxford Pencil sharpener, erasers, pencils, compass, ruler, math sets and calculator, Maped Duo Colorpeps, Pritt pink, Pritt white 3 pack, Milan erasers, Maped Ergologic stapler, Maped 3d Sensoft stickers, Uni Inkview whiteboard markers, Sharpie fine 4 pack, Pilot Frixion refills, Single pens in various colours: Pilot Frixion clicker, Pilot 4 colour pen, Pilot Frixion pens, Frixion highlighter, Pilot Vball, Uniball Eye 157, Unigel Impact, Uni Super Ink marker, Berol handwriting pen, Paperchase own label packs of pens and accessories, coloured filing and notebooks.

Product

The majority of product in Paperchase is Paperchase branded. They do not sell licensed stationery and are selective in the brands of pens and accessories that they sell.

Stationery essentials collections focus on kraft, polypro and brightly coloured ringbinders, plastic filing and project books.

Most product in the store is trend led and is either part of a fashion collection or core category. A fashion collection may include a wide range of stationery, gifts and novelties in the same design. An example of a core category would be diaries, polypro notebooks, design pens or school bags, where an assortment of designs are used across one product type.



For the purposes of this report I am going to look at the Paperchase fashion collections this year and other key trends that were on sale in their flagship Tottenham Court Road Store.

The majority of retailers have played it safe this year opting for either no fashion stationery or large block colour statements. It was therefore refreshing to see some original design stories coming through in Paperchase.

The first fashion collection was Pony Party aimed at tweens it featured unicorns, graduated colour and little stars.



Products included: Reward sticker book, lockable journal, gelly pencil case, personal organiser, HB pencils, padfolio, stationery box, A4 exercise book, A5 exercise book, mini backpack, lever arch, triple pencil case, horse usb, multi list book, trolley backpack, glitter notebook, scrapbook, list and clipboard, glasses case, scented pens, calculator, cup and straw.

The second kids range was Monster Mash Up. A super cute and cheeky range combining monster faces, with a camouflage background.



Products included: backpack, trolley backpack, gym bag, colour changing pens, large desk pad, ringbinder, ideas book, cutlery set, water bottle with cup, triple pencil case, whiteboard, gadget case, lunch bag, mini backpack, hinged box, scrapbook, sticker pack, HB pencils, drinking cup with straw, lunch box set.

The third range, targeted at teens was Wild Aztec. This cleverly combined 4 designs into one range. Unicorns: a galloping black and white unicorn on a purple background, Crazy hearts: a psychedelic heart pattern, Safari: safari animals on a graduated colour background, and the Aztec pattern.



Products included: pass case, zipper wallet, snack boxes, backpack, purse, A5 subject notebook, tin sharpener, maths set, 2 hole punch, cork board, agenda planner book, sticky notes, lunch bag, hearts backpack, unicorn backpack, large exercise book, glitter ziplock notebook, padfolio, stationery box, glasses case, fabric personal organiser, A5 slim flexi

notebook, 8 GB USB stick, flat pencil case, 36 colouring pencils in tin, multi list book, large list book, 5 mini gel pens, iphone 5 case, iphone 6 case, A4 subject notebook, pass case.

The final back to school range again targeted at teens was Hashtag. This was a crazy mix up of 3 designs: Gold Aztec: a sophisticated black and white pattern with foiled gold detailing, Chips: photographic chips and burgers and Hashtag slogans: Chic, What?, Selfie in black and white with gold detailing. Playing on Instagram trends and slogans of posting the mundane and banal with the beautiful, this range was a clever mash up of current trends.



Products included: Backpack, ringbinder, chips 8GB USB, sticker pack, sticky notes, list pad and clipboard, list book, A4 slim exercise book, mechanical pencil, sticky notes, elastic folder, A4 wire notebook, A5 notebook, 2 ball pens, memo notes, sandwich box, snack boxes, water bottle, iphone 6 case, backpack, pass case, small photo album, 5 pencils, popper wallet, zipper wallet, A5 plastic notebook, stickers, sets of A6 and A5 exercise books, flat pencil case, ziplock notebook desktop notepad, iphone 5 case.

Product trends

There were a few new trends in Paperchase that I wanted to pick out. Firstly, there was a whole table dedicated to list books, which seems to be an emerging trend in the market. Secondly, there was an increased amount of colour changing and scented pens and shaped highlighter pens – bears, cats and pandas.

Finally, they had a whole table of Japanese novelty collectable erasers, branded Iwako puzzle erasers. Priced at either £1 each or £6.75 for a pack of 7. Themes were school supplies, fast food, zoo animals and in the forest.

Brands

Paper	The majority of Paperchase stores do not sell copier paper.
Writing	Sharpie, Pilot, Uniball, Bic cristal, Maped markers, Berol italic and writing, Stabilo point 88, Staedtler Noris pencils, Lamy
Colouring	NPW Pirate and Fairytale crayons, Maped Duo Color Peps
Accessories	Sellotape, Scotch, UHU, Pritt, Tipp-ex, Blu tack, Maped scissors, Helix Oxford maths set, rulers, erasers and compass, Post it notes.
Filing	No branded filing
Books and Pads	Rhodia, Miguel Rius

SMIGGLE

I first came across Smiggle in Sydney in 2010 and was interested to see how the brand would translate to the UK market, which already had Paperchase, Blott and Tinc, when Smiggle opened their first store in the UK in February 2014. Described on the Smiggle website as *'a bold, bright and unique stationery retail brand that continues to grow and expand,'* I was highly impressed with the store I visited in Birmingham's Bullring centre.

To their credit Smiggle have moved the brand on from mainly coloured notebooks and accessories to be an original retail concept with highly innovative product.

Part of the Australian Just Group, they have 180 Smiggle stores across Australia, New Zealand, Singapore and the UK. Smiggle has 20 stores currently in the UK and is growing rapidly. They and have plans to open up to 300 stores in the UK in the next 5 years.

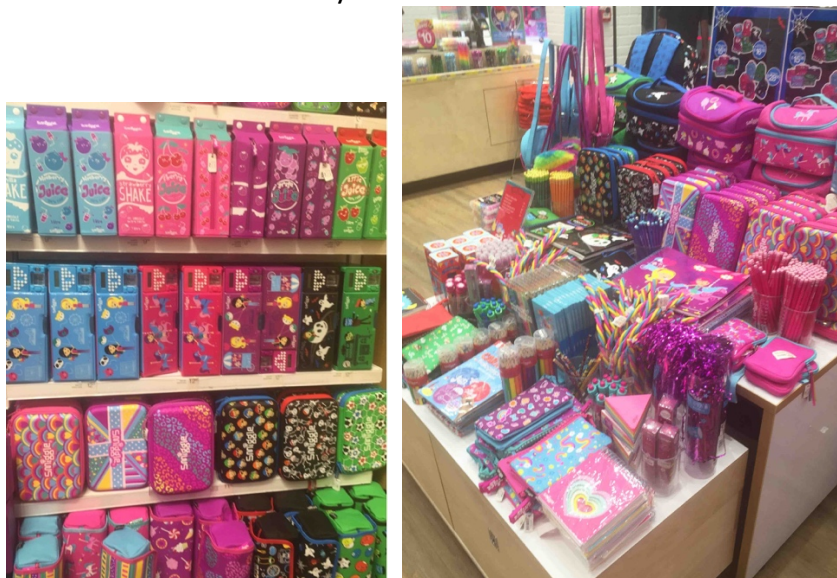
It is very rare to get a truly original retail experience but I can only describe the Smiggle store I visited as an assault on the senses. The colour, lighting and excitement of the store was literally stopping people in their tracks as they walked through the Bullring centre.

The product offer is focused on fun novelty and fashion stationery. Smiggle products are bold, bright and fun. Smiggle describe their mission as to *'Make kids smile and giggle!'*

Everything is merchandised by colour story and targeted at tweens. The whole of the back wall of the store is given over to 'pocket money faves.' You can pick a pencil case and fill it with 5 goodies for £18. Goodies included glitter keyrings, novelty collectable erasers, spy pens, felt pencils, scented pencils and pencils that change colour.

A large part of the product offer is focused on pencil cases and school bags. These products are well designed with high specifications using top quality materials. For example, rubberized pencil cases with chunky zips which look like juice cartons. They also come with high price tags – the backpacks are priced between £15- £28. Pencil case price points start at £7 and go up to £16.50. However, the impressive thing about Smiggle is that the pricing is so discreet that you are already in love with the product before you even notice the price tag.

It will be interesting to see if they can continue to innovate as they increase their store numbers over the next 5 years.



STAPLES

Staples have 136 stores in the UK and their website defines their mission as *'Staples is your partner for office supplies, office furniture and office machines. With us you'll find a wide range of branded items and cost-effective alternatives. For every need, every budget, at any time.'*

They certainly have one of the largest stationery ranges in the market but sometimes struggle with back to school as an event as they are more geared up for the office products market. Their largest challenge is to try and create theatre in effectively a large shed. Last year they had a huge display of school uniform at the front of their back to school offer. They have continued to sell school uniform this year but the scale of the promotion has been toned down and put at the back of the stationery offer. The school uniform has been replaced with a huge cardboard structure from Papermate, which can only be described as an arched tunnel. As a structure and a piece of branded POS it was impressive. However there was one issue that you probably had to be under 12 to shop the product inside the tunnel due to its height. There was a huge amount of Papermate product merchandised on this unit, which had 24 bays of product around it in total. (See part 3 for images)

In general the breadth of product sold in Staples is immense.



Use of Space and Visual Merchandising

The Back to School area was framed by 11 bays of writing and accessories on the left, school uniform at the back and 11 bays of school bags, calculators and coloured stationery on the right. In the centre of the area were cardboard fixtures, smaller metal fixtures and tables merchandising a range of Back to School Product. This did create a shop within a shop feel. However, there were some key items missing from this promotional area which meant you had to browse the rest of the shop to get everything on the Back to School list, examples

being branded notebooks, rulers, erasers and sharpeners. In addition to the promotional area there were a large number of products scattered around the store as follows:

Oxford Campus – New Filing range

Bic Bus

Stabilo Point 88 Pick and Mix Fixture

Oxford Refill pad 300 page quarter pallet stack

Casio Calculators

Staedtler Colouring and Pencils

Crayola Colouring

Letts educational product

Uniball Eye pens

Pilot Frixion pens

Pritt and Sellotape Stick and Switch

Scotch, Post-it, Command

They also made the most of the ends of each run to showcase product that was relevant to Back to School as follows:

SpongeBob Squarepants

Minions and Frozen licensed bay

Pukka Black polypro neon range

Point of Sale

The campaign point of sale was 'Back to School, Release the Talent.' It was understated in dark blue on a white cartoon background. There was generally a lot less Staples advertising than last year both inside and outside of the store. Lots of supplier branded POS was used throughout the store which generally dominated.

Promotions

A number of items were on promotion, however there were fewer promotions than last year. The main promotion was 3 for 2 across Papermate, Berol and Sharpie brands. There was half price Pilot Frixion pens, save 30% on school uniforms, save 30% on academic diaries and half price on Oxford Campus products.

Product

Writing and Colouring

Writing and Colouring is well navigated and split out into sections with coloured shelf edge strips. In each section product is mainly blocked by brand with packs of pens at the top of the display, single pens in the centre of the display and larger office packs at the bottom of the display. As well as branded product Staples stocks its own label writing product, which is packaged in green, blue or orange backing cards depending on the product type. In the back to school space they also had bumper packs of Staples pencils and colouring pencils stacked high. Staples stocked most pen brands but Zebra was notably missing.

Accessories

Accessories are navigated in a similar way to pens with coloured shelf edge labels. Similar product is grouped into bays and these are often supplier branded with POS. For example in

the Back to School space there was a Post it branded bay. Cardboard displays containing maths and geometry sets and clear pencil cases were sited in the seasonal area. For a larger display of rulers and small accessories and pencil cases it was necessary to shop the next aisle.

Filing

Staples have a huge range of filing product – 26 bays in total in the store visited. While there was some product dual merchandised in the back to school area such as subject dividers, for a wider range of product it was necessary to shop the other aisles. As well as Staples own brand there are a wide range of other filing brands on sale in Staples, probably the best filing range in the market. Ten bays were given to ringbinders and lever arch files with price points ranging from 89p for a basic Staples black ringbinder to £16.29 for a Leitz Bepop plastic lever arch file.

The remaining space was split as follows: Plastic pockets (3 bays), report covers (1 bay), display books and folders (4 bays), clipboards (1 bay), manila document wallets (2 bays), plastic wallets (1 bay), expanding files (1 bay), index and dividers (3 bays).

There was a large cardboard unit from Oxford Campus featuring their new Oxford Campus filing range. This range was designed to match the Oxford Campus notebooks and in my opinion is extremely commercial for the retail market. This range included paper over board ringbinders, curved spine lever arch files (shape as per Elba lever arch files), polypropylene document box, 10 part dividers and punched pockets. The product comes with a 4 year guarantee.

Notebooks and Pads

Notebooks were under spaced in the Back to School area with an absence of any branded notebooks. In range space 9 bays were given to notebooks, which were primarily focused on business notebooks with the exception of Oxford Campus and Pukka Navy ranges and new Pukka black polypropylene neon range.

Diaries and Planners

There was a whole table of Collins branded academic diaries both plain coloured and designs all on a save 30% promotion. Prices ranged from £6.25 to £11.75. There were two Collins diaries bays in range.

Lunch bags/ School bags and Licensed stationery

There was a small range of Staples branded lunch boxes in plain, bright colours priced at £6.39.

There was a really nice range of high quality schoolbags including girls fashion designs, girls and boys licensed products and classic black schoolbags and laptop bags. Prices ranged from £8.19 to £39.99.

Licenses sold were Frozen, Minions, Monsters University, Teenage Mutant Ninja Turtles, Skylanders, Marvel Amazing Spiderman and Avengers, Aviator, Monster High, Hello Kitty, Winx Club, Imagine and Billabong.

Licensed lunch bag brands were as follows: Winx, Skylanders, Me to you, Hello Kitty,

Licensed stationery included Despicable me, Frozen, Ultimate Spiderman and SpongeBob Squarepants.

In addition licensed pencil cases were on sale: Spider-Man, Me to you, Hello Kitty, Skylanders, Monsters University.

Fashion Stationery

There was very little fashion design stationery sold as part of the Back to School Offer. There was one Krang design, which featured a collage of tattoo and graffiti imagery.

There was a large range of bright stationery, displayed in yellow, blue, green and pink product statements. This included polypro filing, notebooks neoprene and soft touch pencil cases and photographic tins.

There was a selection of glitter product including lever arch files, pencil cases, and glitter calculators.

Within range Emma Bridgewater spots and Laura Ashley home ranges were sold.

Novelty Stationery

There was very little novelty stationery on sale in Staples.

There was a Purple Peach Stickers spinner.

Brands

Paper	HP Office HP premium choice Bright white Multipurpose Mondi colour copy HP recycled
Writing	Pencils - Staedtler Noris, Faber-Castell, Jaytech, Mechanical pencils- Bic, Rotring, Staedtler, Uniball Kuru Toga, Papermate Markers - Sharpie, Edding, Bic, Stabilo, Staedtler, Highlighters - Stabilo, Sharpie, Pilot, Frixion, Fine writing - Parker, Cross, Franklin Covey, Rollerball - Pilot V5, Frixion, G1, Acroball Uniball gel impact, Signo, TSI, Uniball eye 150 & 157, Vision Elite, Uniball Needle, Power Tank, Signo 207, Jet Stream Handwriting- Berol, Stabilo Fine liners - Staedtler triplus, Stabilo point 88, Sharpie fine liner, Papermate Flair, Ballpoint - Bic Cristal, Soft Feel Grip, Atlantis, Cristal Grip, Cristal pocket scented, Round stick eco solutions, 4 colour - grip Papermate - Ink joy: mini, 100RT, 300RT, 700RT, quarto, 500RT, 550RT, 300 RT 25 piece gift pack, Papermate Comfort, Comfort ultra, Flexigrip - ultra and elite, Replay Aveo
Colouring	Staedtler Bic Kids

Accessories	Faber Castell
	Berol
	Crayola
	Post it
	Sellotape
	Loctite
	Pritt
	Uni bond
	UHU
	Scotch
	Rexel JOY
	Helix rulers, maths sets, angle measure
	Rotring - compass
	Westcott rulers
	Linex ruler
Filing	Casio calculator
	Ring binders and lever arch - Esselte, Leitz, Elba, Black n Red, Pukka filing, Concord, Exacompta.
	Plastic pockets - mainly Staples and Rexel - Rexel, Elba, Excompta, Sec.
	Report covers - mainly Durable
	Display books and folders - Pentel, Sec, Black n Red, Rexel, Exacompta, Europa
	Portfolios - Exacompta, Collins
	Clipboard- Exacompta
	Manila document wallets - Exacompta, Europa, Guildhall
	Plastic wallets - Rexel
	Expanding files - Rexel, Sec, Cathedral,
	Index and dividers - Avery, Leitz, Elba
Books and Pads	Professional notebooks - Avery Notizio, Oxford International, Black n Red, Pukka Metallic.
	General office/ student notebooks - Pukka black polypro neon, Pukka Navy, Pukka Metallic, Pukka Stripe, Pukka Tartan, Oxford office, Oxford Signature, Oxford campus, Avery Notizio, Leitz Wow, Cambridge jotter, Npad, Leitz Complete.
	Arc customisable notebook system.

RYMAN

Ryman now have over 220 stores and an online shop. Their website states:

'...with our business accounts and special discounts for students, our unrivalled product knowledge, range and service, and our commitment to giving you the very best products, we're still just as passionate about stationery as Henry was on that very first day. You can rely on Ryman...'

In reality Ryman may not be the most exciting shop in which to buy your Back to School stationery if you are looking for retail theatre but they are incredibly reliable, they have every product you could need on your back to school list, lots of choice and a strong promotional offer with their 3 for 2 Mix and Match promotion.



Use of Space and Visual Merchandising

Considering the majority of Ryman's stores are quite small they use their space well over the Back to School period. Promotions such as the Mix and Match 3 for 2 are highlighted at the front of store. They also use additional fstds for example the store I visited had fstds for branded pen and accessory offers, Casio calculators, and a Minions licensed stationery fstd. Some of the pen fstds had space for single and packs of pens eg. from Pilot pens. They use shelf shippers for promotional stock to enable them to merchandise packs of pens and accessories in trays as well as hanging.

Point of Sale

Ryman's Back to School colour scheme was neon pink and blue writing on a black background. Promotions were highlighted in neon green on the black background. They did use supplier brands on fstds where there were 3 for 2 or half price offers.

Promotions

The main promotion was a 3 for 2 mix and match promotion across a wide range of pens, accessories, notebooks and filing products, including branded and Ryman's own label

product. Among the products included were: Staedtler Noris pencils, Staedtler ballpoint pens and Staedtler Triplus fineliners and Lumocolor whiteboard markers, Papermate non stop pencils and flexigrip pens, Stabilo point 88 fineliners and Boss highlighters, Bic Cristal Grip pens, Bic 4 colour pen packs, Maped 3d Sensoft scissors, Maped and Milan erasers, post-it notes, Pukka Pad. All product included in the 3 for 2 mix and match was stickered with large round green stickers.

Other special offers included the following:

Staedtler Triplus fineliners pack of 30. Half price Was £25.99, now £12.99

Bic Cristal 10 pack. Half price now £1.79

Sharpie 24 pack. Half price now £8.99

Helix Oxford Maths Set. Half price now £2.19

Product

A good, comprehensive and specialist Back to School range.

Paper

All paper reams were on a 5 for £4 deal. Stacks of Ryman copier paper were piled high near the front of the store visited.

Writing

Ryman have an extensive and specialist writing category, merchandised clearly by product type. To give you an example, in the erasables category alone they had 21 options - 10 options of Pilot FriXion, 5 Options of Uniball TSI and 6 options Papermate Replay. They have a large display of single pens and pen packs.

Colouring

Colouring was a little difficult to find as it was merchandised near to the window, right at the front of store. Ryman aren't targeting kids, more students but with the current trend for adult colouring I thought they could have made this display more prominent.

Accessories

There was a good range of accessory product with all of the essentials covered, focusing more on student accessories rather than novelties as you would expect.

Notebooks, Pads and Filing

The Back to School offer focused on the items included in the 3 for 2 – Pukka branded notebooks in bright colours exclusive to Ryman and Ryman block coloured rollbound ringbinders and lever arch files with matching brightly coloured Ryman polypro notebooks and filing (display books, elastic folders and popper wallets).

Larger ranges of specialist filing and notebook ranges were available at the back of the store.

Diaries and Planners

Mid year diaries were on sale from both Letts and Collins.

Lunch bags/ School bags and Licensed stationery

Larger Ryman stores sold the following brands of school bags: Despicable Me, O'Neill, Star Wars, Minions, Animal, Frozen, Converse, Dunlop, Football, Paul Frank, Accessorize.

The following brands of licensed stationery were sold in larger stores: Avengers, Minions, One Direction, Marvel, Angry Birds, Union J, Little Miss, Gruffalo.

Fashion Stationery

There was a limited amount of Fashion stationery sold in smaller Ryman stores with the product offer focused on core stationery. Larger stores stock the following up market fashion brands of stationery: Accessorize, Coca Cola, Cath Kidston, Go Stationery and Caroline Gardner.

In addition, larger stores had a larger selection of fashion branded pencil cases and pencil cases from fashionstationery.com.

Novelty Stationery

Novelty Stationery was not sold in the stores visited.

Brands

In addition to Ryman's own label the following brands were stocked:

Writing	Ballpoints - Zebra, Bic, Staedtler, Schneider, Lamy, Papermate, Rollerballs - Pentel, Pilot, Uniball, Stabilo Erasable pens – Pilot Frixion, Uniball TSI, Papermate Replay Stylus - Monteverde, Bic, Papermate Highlighters – Stabilo, Maped, Pilot Frixion Handwriting pens – Berol, Stabilo Easyball, Pilot V pen, Zebra Fluente, Bic Easy Clic Markers – mainly Sharpie, some Staedtler Mechanical pencils – Papermate, Pilot, Zebra, Uniball Kuru Toga, Staedtler, Pentel Fineliners – Staedtler, Papermate Flair, Stabilo, Uniball Fineline Pencils – mainly Staedtler, Faber Castel, Stabilo
Colouring	Staedtler, Berol, Bic Kids, Maped, Crayola
Accessories	Helix, Maped, Fiskors, Rexel, Posit, Trodat date stamps, Pritt, Loctite, Sellotape, Scotch, Blu tack Erasers – Helix Oxford, Staedtler, Maped, Milan Geometry sets – Helix Oxford, Rotring, Linex
Filing	Avery, Elba, Snopake, Durable, Europa, Exacompta, Tiger, Rexel, Goldline,
Books and Pads	Oxford NOTE, Black n red, Rhodia, Pukka Pad, Nu, Nu Elite, Europa, Leuchtturm, Paperblanks, Moleskine,

WHSMITH

WHSmith's website states the following as its mission: *'WHSmith intends to build on its position as the UK's most popular bookseller, stationer and newsagent by continuing to grow its strongly performing Travel business and delivering its High Street plan. We aim to improve the Company's profitability and cash flow generation, delivering sustainable returns to shareholders.'*

The largest High Street store I visited over the Back to School period was their city centre store in Birmingham. Stationery is on the first floor in this store alongside books, greetings cards and games.

The store was visited on a Saturday morning and was fairly busy. Staff were attentive and customer service was good.

Windows

For the past 5 years WHSmith window displays at this time of year have featured an up to 75% off stationery promotional message. This year the Sharpie deal of save £10 on a Sharpie 24 pack (was £16.99 now £6.99) when you buy any stationery was repeated from last year and was the most prominent promotional message featured in WHSmith window displays nationwide. The window features a display of Sharpie highlighters then photography of both own label WHSmith product and branded product (Pukka project book, Stabilo Boss highlighters and Staedtler Noris set) in the advert. The window displays shout both a value message (save £10) and a product message showing an array of bright products, a quality message is reinforced with the use of the brands.

Use of Space

WHSmith use front of store space and promotional units in secondary space to highlight Back to School stationery offers. Promotional offers are also scattered throughout the store and they do a good job of getting customers into the store to shop all areas rather than just offers at the front. Effectively secondary space and range space merge to form the Back to School offer. The amount of space WHSmith has to fill means they can be a specialist and stock a wide range of product and brands. The advantage of this means you can be guaranteed to get everything on your Back to School list in one store.

The amount of space given to Stationery in this store was over 100 bays! Some categories were clearly defined as is detailed below.

A breakdown of how WHSmith split range space between categories is below:

Category	Total Space split	Space breakdown by bay
Writing	Total 11 bays	1. Rollerball 2. Rollerballs and erasables 3. Ballpens and fineliners 4. Ballpens 5. Premium and Fountain pens 6. Refills and handwriting pens

		7. Highlighters and pencils 8. Marker pens 9. Loose pens, mainly WHS own label 10. Stabilo branded bay 11. Loose pens, mainly branded
Accessories	9 bays	1. Tapes and Adhesives 2. Tapes and Adhesives 3. Tapes and Adhesives 4. Labels 5. Small accessories and tippex 6. Scissors and Staplers 7. Maths sets and sharpeners 8. Erasers 9. Rulers
Filing	17 bays	1. WHS Brights range 2. WHS Brights range 3. WHS Brights range / File pockets 4. WHS Brights range / WHS Subject dividers 5. WHS Brights range/ Branded Subject dividers 6. WHS Simple style/ WHS and branded elasticated folders 7. Snopake branded bay 8. Branded display and presentation files 9. WHS clipboards and document wallets 10. WHS Brights and Rollbound filing 11. WHS Brights and Rollbound filing 12. WHS Kraft range, Branded filing, Europa. 13. Foolscap home files, filing drawers and magazine files. 14. Exacompta forever document wallets, WHS square cut folders/ Cathedral Metal box files. 15. WHS wallet files/ Snopake polyfiles 16. Display and presentation/ Snopake and WHS organisers. 17. Clipboards/ Index cards and boxes/ WHS and Elba Foolscap suspension files.
Books and Pads	6 bays	1. Pads and notepads – Oxford Campus/ Pukka Stripe/ Oxford Signature/ Pukka Dot. 2. Moleskine/ Black n Red/ WHS Brightbooks 3. WHS Brights polypro notebooks/ WHS own label black and red notebooks. 4. WHS refill pads. 5. Pukka Pad bay: Pukka neon/ Pukka metallic/ Pukka stripe/ Pukka navy. 6. Nuco bay: Nu elite/ Nu craze/ Nu era.
Pencil cases	6 bays	

School bags and 5 bays
lunch boxes
Arts and craft 15 bays

2 of these bays were kids colouring – 1 WHS branded, 1 Crayola branded, the remainder was specialist art products. Kids colouring was dual merchandised throughout the store and as part of the WHS offer.

Visual Merchandising

A lot of product was cross merchandised to form back to school statements and offers. Some product statements were clear for example a neon coloured bay/ a 3 for 2 on writing/ A Papermate branded bay.

Other product statements were confused by random product adjacencies such as home files next to small accessories. This is an example of where colour was used to create product statements but did not really work as the products weren't naturally linked.

WHSmith use metal shelving for notebooks, filing and dated product. Tiered acrylic waterfall fixtures are used for some notebooks and filing.

Writing instruments, pencil cases, colouring and most accessories are displayed hanging. Fashion ranges were displayed on tiered shelving or display tables. Lunch bags and bottles are displayed on shelves; school bags were displayed hanging. Some additional metal fixtures were used for writing promotions. For example, a whole side was given to Staedtler product, a whole side to Bic product and a whole side to Parker product and this unit included branded Point of Sale.

Cardboard fixtures were used in centre aisle walkways for specific back to school product such as adhesive film, WHSmith pack of 15 ballpoint pens, WHSmith erasers, WHSmith 30cm ruler, Helix nano curves maths set, WHSmith 30 fineliners, Staedtler Noris HB pencils with eraser and sharpener, Scotch stationery essentials pack, WHSmith 4 assorted highlighters, WHSmith maths set. A cardboard stack featured WHSmith coloured refill pads.

Point of Sale

On the whole WHSmith use clear **headers** around the store to navigate their ranges so it easy to find different categories.

Range POS is blue with white writing. Various colours are used in the writing category to highlight different subcategories, where navigation can be difficult.

Price edge labels are white for non promotional pricing and yellow and red for promotions. The red part highlights the promotion and the yellow part the price.

Some offers are also highlighted using pink POS with white writing, blue POS with white writing, or red POS with white writing. It is not clear as a customer what the different POS colours are for but adds to the general brightly coloured feel of the store.

Back to School POS is black with yellow and rainbow coloured writing. Shelf strips are black with rainbow coloured dots in the promotional areas. These are quite fun and enhance the product particularly on the brighter WHSmith ranges. This year WHSmith had Evian water sponsoring their Back to School point of sale, which seems an unusual choice for a stationery promotion.

Branded POS is used throughout the store – sometimes in a subtle way featuring a white outline of a supplier logo on a blue background and sometimes in much prominent ways. Blue and white branded POS was used for the following brands: Pukka, Oxford.

Branded bays were given over to Snopake, Casio, Stabilo, Papermate, Crayola and Nu.

Branded sides of metal secondary space units were allocated to Staedtler, Bic and Parker.

Permanent heavily branded secondary units were on display from Lamy and Sellotape.

Temporary branded cardboard displays were on display from Stabilo, NPW get creative, Crayola colour alive sets.

Writing POS: Writing is a heavily branded area and WHSmith support writing brands by highlighting branded logos and also highlighting new writing products on A4 strut cards which are displayed amongst the merchandise.

Promotional messages

WHSmith do a brilliant job of bombarding customers with promotional messages in store over the Back to School period so that you think you are getting a great deal. I remember a friend once telling me one summer 'look at all this stationery I've bought at WHSmith, they've got a sale on.' The leading promotional message is always up to 75% off stationery, however very few products seem to fall into this category when you are actually in store.

The following promotional mechanics are used in store: up to 75% off, 60% off, half price, 3 for 2, 4 for 3, 3 for £X, 25 % off, 20% off, 40% off, £1 off, save £X, 2 for £X, half price X if you buy Y, buy one get one free. The whole promotion ends up being rather confusing to shop, particularly as product often ends up being dual sighted. For example a branded pen display can look impactful with an offer such as 3 for 2 but when those pens are then displayed in range amongst lots of other pen brands with a tiny 3 for 2 price ticket it can get confusing. On the writing category it's also difficult to identify what is and isn't included in a promotion, is it a mix and match promotion or just across selected brands for example.

Often it is really difficult to see how much a product costs if you just want to buy a single unit. Perhaps a deliberate strategy to encourage customers to buy into multi buy promotions of which there are many in WHSmith.

Specific branded promotions noted in WHSmith were as follows:

Sharpie 24 pack only £6.99 (save £10) when you buy ANY stationery.

3 for 2 mix and match on:

Pilot Frixion triple packs, V5 bonus packs (3+2),

Zebra Zgrip 10 pack

Selected Bic lines including Bic cristal.

Selected Papermate lines including Flexigrip and Inkjoy and Berol handwriting pens twin pack and selected Papermate Relay lines, Papermate non stop 10 mechanical pencils.

Selected Uniball eye and Vision Elite lines

Stabilo fineliners and Boss highlighter pens

Staedtler stationery sets and Noris pencils

Faber Castell stationery sets.

Selected Parker and Lamy fountain pens, jotters and refills.

3 for 2 mix and match bay given to Papermate product including branded POS.

3 for 2 on loose Staedtler pens and pencils

Stabilo 3 for 2 on selected lines (fsdu)

Buy one get one half price on Pilot Frixion twin packs

4 for 3 on student erasers (includes rulers, erasers, sharpeners, selected maths and geometry sets including some Helix and Maped products)

Save 20% on Casio fx85GT now £9.99.

Save £5 on Casio JW200 White Desk Calculator now £9.99, was £14.99.

3 for 2 on selected Sellotape lines including Sellotape original gold.

Save 30% on Tippex Rapid.

3 for 2 on Pritt stick 11g and 22g.

4 for 3 on Pritt value triple pack.

Half price Helix Oxford executive stationery set was £5.99 now £2.99

Save 60% on Helix Nano Curves stationery set was £4.99 now £1.99.

Buy 1 get 1 half price on all Snowpake.

3 for 2 on all Nu notebooks.

25% off Pukka A4 metallic jotta now £3.74, was £4.99.

Save £2 on Pukka A4 stripe project book was £6.99 now £4.99.

20% off Pukka A4 polypro jotta was £5.99 now £4.79.

3 for 2 on Oxford Campus notebooks.

Half price on Black n Red A5 casebound notebooks.

3 for 2 on Pukka neon jottas and project books.

3 for 2 on Pukka navy jottas and project books.

3 for 2 on Bic kids.

Crayola – up to half price message – dual sided on promotional metal display unit

Crayola 12 Supertips save 25% was £3.99, now £2.99

Crayola 36 coloured pencils save 30% was £6.99, now £4.89.

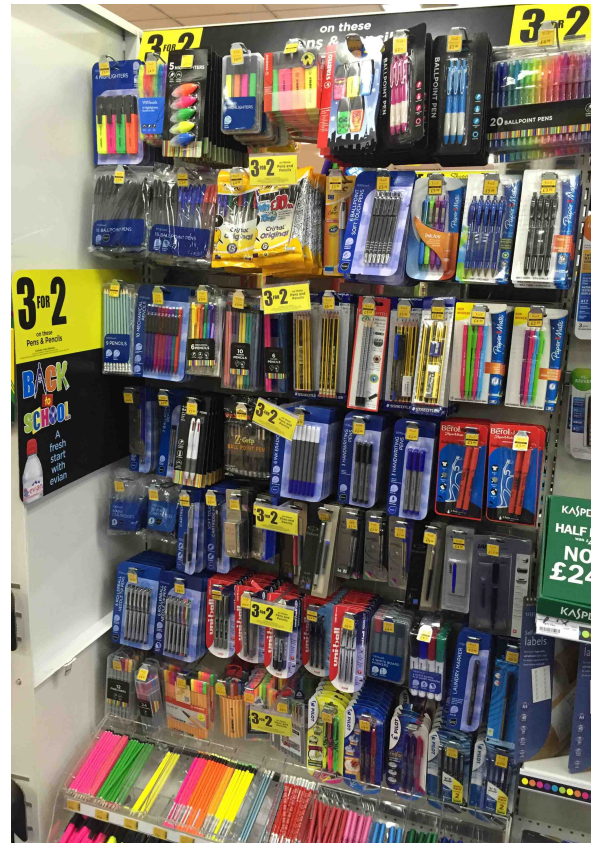
Crayola 24 coloured pencils save 25% was £4.79, now £3.59.

Crayola 14 Pip Squeaks mini markers save £1.50 was £4.49, now £2.99.

Crayola 24 Crayons save 70p was £2.69, now £1.99.

Maped 12 Colorpeps Jungle was £5.99 now £2.99

3 for 2 mix and match brights/ neon bay including Pukka neon product.



Promotional bundle packs:

Uniball Signo TSI 12 pack save £12, was £18.99, now £7.99.

Bic Cristal Colour Collection 15 pack save £6, was £9.99, now £3.99.

Papermate Inkjoy 300RT 25 pack save £11, was £19.99, now £8.99.

Scotch stationery Essentials half price set save £5.

WHSmith 30 Assorted Gel and Ball pens only £4.99 when you buy ANY pencil case.

Crayola 65+ piece set coloured pencils half price was £14.99 now £7.49

Crayola 65+ piece set Supertip pens half price was £14.99 now £7.49

Crayola 65+ piece set Twistables half price was £14.99 now £7.49

Crayola 65+ piece set washable markers half price was £14.99 now £7.49

Product

A huge specialist product range with everything you could need from a Back to School list.

Writing

WHSmith have a very comprehensive writing category with a good mix of single pens and pencils and pen packs. Pen packs are displayed hanging and single pens in acrylic trays at the base of the fixtures. The majority of the range is made up of writing brands with a small amount of own label product in each category. They merchandise product firstly by type eg. rollerballs, ballpoint then by brand. Brands are block merchandised by type, which can look very impactful. WHSmith branded product is usually displayed lower down in the fixture with premium selling space given to best selling branded product.

Colouring

WHSmith have a large selection of branded and own label colouring. There was a specific Crayola bay and a large selection of Let's Create WHSmith branded product. They also have a specialist arts and craft section. Other colouring brands such as Maped and Bic Kids are dotted throughout the store in promotional Back to School bays.

Accessories

In their accessories range WHSmith strike a good balance between office product and school product, showing they know their target customer. The erasers and sharpeners bay for example had pick and mix acrylic trays encouraging multi buys. Product in this area was generally more fun and brightly coloured, targeted at children. Whereas the staplers and hole punch section is made up of mainly black and grey more industrial product.

Notebooks and Pads

WHSmith split out WHSmith own label and branded products in their stores. The WHSmith ranges seem to have the following hierarchy:

Entry level books and pads are in WHSmith blue packaging

Coloured books and pads are mid tier and are split by substrate or colour: Coloured polypro wirow notebooks and project books / Black and red paper over board WHSmith notebooks, mainly casebound, neon coloured wirow notebooks and refill pads/ PU casebound notebooks under the sub brand Bright Books.

Branded notebooks were merchandised by brand then type:

Pads and wirow notebooks – Oxford branded bay featuring Oxford Campus and Oxford Signature ranges.

Black n Red branded product was given 3 shelves. Moleskine was given 2 shelves. Pukka was given a whole bay and Pukka neon product is also cross merchandised with WHSmith neon product.

Nu product had a whole bay end in another part of the store.

Design notebooks were featured within fashion collections.

Mid Year Diaries

There was a good range of mid year diaries with some interesting fashion designs and substrates.

Filing

WHSmith have a large range of filing products which seem to be targeted into 3 sections:

Student/ General filing – a large selection of WHSmith branded brightly coloured files available in 8 rainbow colours. The range includes own label ringbinders, lever arch files, rollbound files and box files, document wallets, folios.

This area is obviously where the volume is due to the space it is given by WHSmith. It is mainly WHSmith branded with a small amount (two shelves) of branded product (Pukka neon ringbinders, Elba ringbinders, Exacompta coloured manila document files, Concord Contrast ringbinders). It will be interesting to see if any brand will be able to break into this area with a top tier branded filing product.

Polypro document wallets either feature a design such as a spot or stripe or are in a plain coloured multipack format. Eg. 5 coloured foolscap popper wallets, 2 design popper wallets.

Punch pockets were split into packs of 20/ 50 or 100 with an opening price point of £1.19 for 20 WHSmith punch pockets. Top tier product was from Rexel's twinlock range with a top price point of £5.99 for 25 heavy duty punch pockets.

Indexes and Dividers are mainly WHSmith branded with some top tier product from Rexel and Elba.

Clipboards were available in a range of block colours and designs such as hearts and spots.

Index and revision cards are available in white and neon coloured packs.

Home Office – mainly black paper on board, kraft, or white polypro product sometimes branded as Simple Style. There was also some block coloured product. Product included ringbinders, lever arch, magazine files, stationery boxes, foolscap home files, expanding files. There was also a small range of clear acrylic and silver mesh filing products and Cathedral metal home files.

Specialised executive products – presentation files, document boxes and trapper files.

WHSmith own label product included black polypro and white frosted polypro filing. More sophisticated branded products include Snopake (polypro filing and black pu file cases and executive organisers), Black n Red (black polypro range), Rexel trapper files and Durable clip files. Price points vary dramatically in this area with Black n Red being the most expensive brand.

Own label product

WHSmith have a strong brand and this carries through to their own label product, which is amongst some of the best quality in the market. The majority of own label products in the store are WHSmith branded but they also use sub brands such as *Let's Create* on colouring and *Simple Style* on Filing and *Moderno* and *Bright Books* on notebooks. WHSmith own label packaging is blue with white text which sets the colour standard for the stationery market. There is a large amount of bright and neon product in the store and the packaging in these areas is black with coloured text. Own label product is used as an entry price point with the branded equivalent used as a trade up. For example WHS black or red A4 notebooks are priced at £3.99 and the Black n Red version is priced at £5.99. In the writing category often you will get double the number of units in a pack for the same price point. For example 6 WHSmith Needlepoint rollerball pens are price at £6.99 and 3 Uniball Needle rollerball pens are also priced at £6.99.

Brands

The following brands are sold in WHSmith in addition to WHSmith own label:

Paper	HP Everyday Printer Paper
	HP Printing Paper
	HP Colour laser
	Xerox

Writing	Uniball – TSI/ Vision RT/ Jetstream/ Eye/ Signo 207/ Click BP/ Kuru Toga/ Shalaku/ Inkview/ Signo Gelstick
	Pilot – V5/ V7/ Frixion/ G-2/ Acroball/ VPen/ Drawing pen/ Frixion highlighters/ Laundry tec
	Bic – Cristal Original/ Cristal Fun/ Cristal Grip/ 4 colour original/ grip/ fun/ Stylist/ Softgrip/ Briteliners/ Bic matic mechanical pencils/ Eco pencils/
	Papermate – Replay/ Inkjoy/ Berol coloured pens/ Berol handwriting pens
	Sharpie – highlighters – Fluo XL/ pocket/ mini, markers, laundry pen/ fabric markers/ W10/ fineliners/ Electropop/ whiteboard markers/ Stylo grip
	Pentel – Energel/ Hybrid gel grip/ Ball Pentel/ Sterling/ P200 mechanical pencil/ ESharp/ Easyflo whiteboard marker/
	Zebra – Jimnie/ Marathon/ J-Roller RX/ G-301/ ZGrip/ ZGrip Flight/ Daisies/ Funky/ ZGrip mechanical pencils/ Cadoozles
	Staedtler – Triplus fineliner/ Neon fineliner/ Triplus Fibre Tip pens/ Triplus highlighters/ Noris pencils/ Neon pencils/ Woodless pencils/ Lumicolour/ Wopex/ Stick 430/
	Stabilo – Point 88/ Point 88 Zebra/ Boss highlighters/ Mini Heroes/ Festival highlighters/ Navigator/ Be Wild/ Pen 68/ Stabilo Power Fibre Tips/ Trio Scribbi/ Cappi/ Smartball/ Fineliner
	Faber Castell – highlighters/ pencils/ neon pencils/
	Parker
	Lamy
	Platignum
	Cross
	Waterman
	Shaeffer
	Rotring
	Schneider
Kids colouring	Crayola
	Bic Kids
	Maped jungle peps
	Stabilo
	Let's Create – WHS own label
Accessories	Rulers – Maped/ Helix
	Erasers – Maped/ Staedtler/ Milan/ Swordfish/ Faber Castell
	Pencil Sharpeners – Maped/ Helix Oxford/ Swordfish/ Faber Castell
	Maths and Geometry sets – Helix Oxford/ Maped
	Scissors – Maped
	Hole punches – Maped/ Rapesco
	Staplers – Rexel/ Maped
	Calculators – Casio
	Post it
	Blu tack
	Tippex

Filing	Tapes – Scotch/ Sellotape
	Glues – Loctite, Bostik, Scotch, Pritt white/green/pink/power/tube
	Rexel
	Elba
	Snopake
	Pentel Recycology
	Durable
	Concord Contrast
	Europa
	Exacompta Forever
	Cathedral
	Black n Red
	Pukka Pad
	Oxford Campus and Signature
Books and Pads	Black n Red
	Nu
Licensed products	Moleskine
	The majority of brands featured in the lunch bags and pencil case area as below. There was a complete lack of licensed stationery in this store with the exception of Hello Kitty.
	Hello Kitty
	Disney Princess
	Minnie
	Avengers
	Star Wars
	Ultimate Spiderman
	One Direction
	Animal
	Moshi Monster
	Bart
	Angry Bird
	Minions
	Targus and gadget shop laptop bags
	Filled pencil cases: Hello Kitty/ Skylanders/ Minions/ Frozen/ Family Guy/ Angry Birds
Fashion stationery	WHSmith fashion stationery ranges:
	Lexi (zigzags and stripes)
	Carnival Stripe
	Bramble Wood (Owls)
	Face friends (animal faces)
	Tartan clash
	Yolo glitter
	Camo Cool
	Polka
	Amelie
	Melodie
	Katarina

Olivia
Maisey Daisy
Hello Kitty
Kiyomi
Oilily

Fashion Stationery

WHSmith had 15 fashion stationery ranges on sale in this store. The majority of these ranges were targeted at girls. Designs included owls, tartan, polka dots, animals, florals, butterflies and birds, doodles, camouflage, zigzags and stripes. WHSmith have upped their game when it comes to fashion stationery and are now competing more closely with Paperchase. They have put more interesting formats into their ranges such as glitter notebooks and scrapbooks, fashion design popper wallets and matching snack boxes and satchels. Some of this product could be seen as gift stationery.

Novelty Stationery and Accessories

The current craze for novelty erasers meant that a whole table was given over to erasers in all shapes and sizes in WHSmith as well as a whole bay of range product including Iwako erasers from Japan.

Although there were definitely other novelty products scattered throughout the store such as oversized pencils and penguin shaped mechanical pencil sharpeners these were mainly scattered in with the fashion ranges. For example Face Friends featured shaped earphones, flashdrive, push pins and paper clips. Bramble Woods featured novelty pushpins, a flexi ruler, reward stickers and shaped sticky notes.

The lunchbag selection featured shaped eva 3d character heads for Spiderman, a Lion and a Owl.

Arts and crafts products with a twist were featured in an NPW branded fsdu.

There was one bay of novelty accessories ranged with the Back to School product. This featured Bright Stuff branded coloured elastic bands, paperclips, pins, bulldog clips, novelty pushpins, lanyards, fluorescent laces, iron on letters and novelty calculators.

Perhaps the most interesting pens stocked in WHSmith were from Stabilo who have some interesting shaped moulds and funky designs.

There was a spinner for reward stickers and a spinner for novelty stickers branded heart stickers featuring hearts, numbers, letters, cats, elephants, moustache, dogs, owls, cupcakes, cakes, stars, flowers, monsters and woodland animals with both holographic and gel effects.

Pencil cases/ lunch bags and school bags

WHSmith always have one of the largest and best pencil case ranges when it comes to Back to School and this year is no exception. They have over 80 options of pencil case, 15 filled pencil cases. There was a good selection for both boys and girls with a variety of shapes and

designs. Also a good selection of price points with the majority of items priced between £4.99 and £7.99.

There was a half price 30 coloured gel and ball pen pack for £4.99 with the purchase of any pencil case. A clever way to get customers to cross purchase across categories and use WHSmith own brand pens.

The lunch bag and bottle offer was made up of licensed and WHSmith fashion designs. Most items were on a save 20% or save 30% promotion priced at £6.99 up to £16.99 as part of the promotion. Brands included Hello Kitty, Disney Princess, Minnie Mouse, Bart, Avengers, Angry Birds, Minions, Star Wars, Spiderman, Zoom Lunchgear, One Direction, Animal and top tier Beau Elliot. There were also a selection of plain coloured entry price point bottles, lunch bags and rucksacks.

School bags were split between a range of coloured satchels and 5 rucksacks featuring fashion designs, 1 black pu rucksack, 1 black nylon rucksack with a yellow neon trim. Satchels were priced between £17.99 and £19.99. Rucksacks were priced between £2.99 for an entry level red nylon rucksack up to £14.99 or £19.99 for design rucksacks.

WHSMITH TRAVEL

The largest WHSmith travel store visited was in Victoria Station in London. The stationery department is situated on the first floor. The ground floor was dominated by magazines, confectionery and food to go and is a busy thorough fare. In this respect WHSmith fulfil their travel goal – *‘to be the leading retailer in convenience, books and news for the world’s travelling customer.’*

The upstairs of the store has a completely different feel with a light, well stocked and well merchandised stationery and card department. It was remarkably quiet considering it was before ten on a weekday morning. Signage and use of POS was very clear in this store and very brand heavy. Product was well merchandised on a variety of fixtures. For example, pens and accessories were hanging, filing and notebooks were on waterfall acrylic fixtures. Branded and fashion notebooks were displayed on white tables.

The product offer was split between essential stationery, business stationery and gift stationery, with much more emphasis on business products and top tier brands than WHSmith High Street.

Overall I was impressed with the range of stationery in this store. The main negative point would be the high price points, which did put customers off. While I was in the store two customers commented on the price points to the cashier. One actually put the product she was going to buy back saying she would wait to buy it locally rather than paying central London price points.



There were 4 bays of targeted Back to School stationery and here there was a lot of crossover with the High Street offer with a large emphasis on brightly coloured product. The POS above the display read ‘Love Colour, Mix it up.’ There was nothing in the way of POS to highlight that this was a specific Back to School offer apart from the product mix – WHS coloured filing, WHS polypro notebooks, WHS Bright books, Pukka Pad Neon notebooks, Fabriano notebooks, WHS fashion filing, packs of coloured pens, loose coloured pens and bright accessories (light

up pens, patterned scissors, bendy erasers, fluoro highlighters, iron-on letters) and post-it notes. The following WHSmith fashion ranges were also in this display: Amelie, Lexi, Katarina, Olivia, Kiyomi.

The product was not on promotion at the beginning of August.

There was little licensed product sold in the store with the exception of some pencil cases which featured Barbie, Peppa Pig, Mike the Knight and Hot Wheels brands. Some colouring and sticker books were sold under the Crayola and Galt brands.

Space in the whole stationery department was split in the following way:

- 2 bays paper
- 1 bay photo albums
- 2 bays manager's special offers
- 4 bays art and craft (1 bay of this was Crayola)
- 2 bays social stationery (included correspondence and diaries)
- 2 bays post
- 2 bays adhesives
- 1 bay Snopake filing
- 4 bays filing
- 3 bays notebooks and pads
- 6 bays office essentials (accessories)
- 1 bay Black n Red branded notebooks
- 1 bay Nu branded notebooks
- 5 bays of pens
- 1 bay Stabilo branded – pens and colouring
- 1 bay laminating pouches
- Moleskine branded stand – 4 sides
- Table 1 – Rhodia
- Table 2 – Happy Jackson
- Table 3 – Go Stationery
- Table 4 – The Art File and Ohh deer.

- 1 Rhodia spinner
- 1 spinner for Book Related Gifts
- 1 Filofax unit
- 1 Leuchtturm stand

Brands and Space were split as follows:

Paper	Pukka Paper
	HP A4 90gsm
	Xerox Strong tints
	Xerox Symphony
Writing	Stabilo branded bay
	Cross branded bay
	Parker jotter
	Papermate Flexigrip/ Inkjoy/ Replay max/ Flexigrip elite
	Bic Cristal original/ fun/grip

Bic 4 colours
 Bic Atlantis soft and Atlantis Stic
 Bic 2 in 1 stylus
 Pentel P200 series mechanical pencil
 Staedtler stick 430
 Pilot G2
 Zebra RX rollerball
 Zebra G-301
 Zebra Z-Grip
 Zebra Funky
 Zebra Flight
 Zebra Daisies
 Uni Signo gel grip
 Uniball Eye
 Uniball Eye needle
 Uniball Vision Elite
 Lamy al-star
 Pentel Energel
 Pentel Recycology
 Pilot V5
 Pilot G2 retractable
 Pilot Vball grip
 Pilot Vball grip bonus pack
 Pilot V7
 Uniball Jetstream 101
 Uniball Fathom
 Pilot Frixion
 Waterman/ Lamy/ Frixion/ Parker/ Cross refills
 Uni Chalk marker
 Sharpie marker
 Pentel marker
 Staedtler lumacolor marker
 Pilot laundry pen
 Schneider marker
 Zebra fluent fountain pen
 Parker fountain pen
 Papermate non stop mechanical pencils
 Uniball Shaluku mechanical pencil
 Zebra mechanical pencil
 Pentel e-sharp mechanical pencil
 Staedtler Noris loose pencils, student set, traditional HB, Eco.
 Staedtler triplus fineliners
 Berol fineliners/ handwriting pens, Berol colours.
 Kids Colouring Crayola

Accessories	Brother and Dymo labelling machines
	Maped letter openers and knives
	Helix magnifiers
	Maped, Helix and Milan branded erasers
	Maped and Helix rulers
	Casio calculators
	Helix and Maped maths and geometry sets
	Pritt glue sticks
	Loctite superglue
	Unibond no more nails
	Bostik all purpose glues
	Sellotape
	Scotch
	Blu Tack
	Post it notes
	Tippex
	Maped scissors
	Helix cash boxes
	Maped staplers
	Rexel staplers
	Maped hole punch
	Rapesco hole punch
Filing	Snopake branded bay featuring Platignum pens, Noteguard notebooks, Electra display books, Executive 2 and 4 ring presentation binders and 6 part organisers.
	Acco heavy duty presentation pockets
	Duraclip files and report files.
	Nu era 3 part organisers (coloured manila)
Notebooks	Black n red filing – binders and executive folders – 1 shelf in branded bay
	Moleskine 4 sided unit – featuring full range of Moleskine notebooks, laptop bags and travel accessories.
	Rhodia – 4 sided Rhodia spinner and table featuring Rhodia orange and black stationery and Rhodia coloured notebooks.
	Black n Red bay of product
	Nu bay of product featuring Nu Elite, Nu Era, Nu business, Nu pop journals
	Pukka pad – 4 shelves
	Oxford Campus and Signature – 2 shelves
	Leuchtturm notebook spinner
	Fabriano – 2 shelves
	Castelli - 2 shelves
	Paperblanks – 1 shelf
	WHS moderno – 3 shelves
	WHS books and refills – 1 bay
	Go Stationery notebooks – 1 table
	Art file notebooks – ½ table
	Ohh deer notebooks – ½ table

Happy Jackson notebooks – ½ table

WILKINSONS

Wilkinsons now have 375 stores in the UK. Their website states their strategy is as follows: *'We're all about helping our customers getting those to dos done, so when you're on a mission to get stuff done, where there's a Wilko, there's a way.'*

In 2015 they have introduced a new pricing strategy of year round *stay low* pricing to compete with discounters. Customers have a great value price perception of Wilkos and as a value trader this is of great importance to them particularly around entry price points. Their ranges have clear product hierarchy with Wilko functional at entry level, Wilko at mid tier and branded product as a top tier. The pricing analysis in the appendix shows them to be the cheapest stationer on the high street while continuing to ensure that product quality continues to be high. This message is reinforced in store with radio messages saying '100s of products £1 or less or check us out online when you really want to get stuff done, where there's a Wilko there's a way.'

Use of Space and Visual Merchandising

Wilkos typically promotes from range for Back to School, however there were also two additional pallet sized fsdus used in the store visited and full use was made of secondary space on island ends to dual face back to school product. In addition, there were branded fsdus from Bic, Zebra and Blueprint (Hello Kitty and Coca Cola stationery).

Range space was split as follows in the store I visited:

- Bay 1 Pens and Accessories
- Bay 2 Pens and Accessories
- Bay 3 Post
- Bay 4 Filing
- Bay 5 Filing
- Bay 6 Filing
- Bay 7 Filing
- Bay 8 Scrapbooks/ Photo Albums/ Social Stationery
- Bay 9 Ink Cartridges and Printer Paper
- Bay 10 Fashion Stationery
- Bay 11 Fashion Stationery
- Bay 12 Novelty and kids stationery
- Bay 13 Kids colouring
- Bay 14 Craft and Colouring Books
- Bay 15 Kids craft
- Bay 16 Paper and adult craft

Generally, the product statements were very clear and uncluttered and fixtures had been well thought out according to product type for example, specific metal towers for merchandising fashion stationery. Writing was displayed hanging, with acrylic units for smaller accessories underneath. Notebooks were displayed in waterfall acrylic fixtures, filing was blocked by colour into pink, blue and black product statements. The only negative comment I would make re visual merchandising was sometimes pricing was missing on individual items and

with waterfall fixtures it was sometimes difficult to see which prices corresponded to which items.

Point of Sale

The key marketing messages throughout the store were:

Get School Stuff Sorted

Keep the Kids busy

Get Student life sorted

Stay low price

Wilko's had a comprehensive POS suite with cardboard wraps over security gates, hanging POS throughout the store labelled 'Get School stuff sorted', wraps around mesh dumpbins labelled 'Stay Low Price', shelf edge strips and bus stops labelled 'Stay Low Price'. Their Back to School pallets were in my opinion the best in the market. They had eye catching cardboard yellow pencils on each corner. There were branded logos in black on the yellow background from Berol, Papermate, Staedtler, Sharpie, Helix Oxford, Casio and Wilko. There was a royal blue background where the corresponding product was actually displayed with colourful 'Get School Stuff Sorted' branding at the top. A ½ price message or save message was in a large roundel next to the branding.



Promotions

Due to their Stay Low Pricing Policy there was very little stationery product on promotion.

The exception to this was the following products, which were on offer until 27th August:

Berol handwriting pens. Half Price. Was £1.50, now £0.75.

Berol cartridge pen Was £2.80, now £1.80.

Berol 12 fibre tipped pens. Was £5.50, now £3.50.
Stabilo Point 88 fineliners. Was £5, now £2.50.
Stabilo Boss highlighters. Was £3.25, now £2.25.
Stabilo Boss mini heros. Was £3.15, now £2.15.
Stabilo Easy Start. Was £4.75, now £3.75.
Stabilo Graphite timetables pencils. Was £1.35, now £1.
Papermate Non Stop Mechanical pencils. Was £2, now £1.
Papermate Ink Joy 300RT. Was £4, now £3.
Papermate 100. Was £2, now £1.50.

Product

A comprehensive range strong on core, fashion and kids' stationery.

Paper

Most of the paper that was backed with additional space was Wilkos copier paper. Xerox was also sold in range.

Writing

Generally, a comprehensive range of writing products displayed in range featuring best selling branded product and a small amount of Wilkos own label product. This was complemented by promotional deals on Wilkos pallet fsdus and supplier branded fsdus from Bic and Zebra.

Colouring

In range slightly more space was given to Bic Kids product than Crayola. However, there was an additional fixture for Crayola on a ladder rack in another part of the store. Colouring was displayed hanging, 3 out of 5 shelves were for Wilkos' branded colouring. In addition, an island end was given over to Wilkos colouring products and colouring books.

Accessories

Accessories were displayed partly hanging with pens, with smaller items in acrylic fixtures underneath. They had all the essential accessory items you would need for this time of year and a large own label selection. However, there was a limited choice of branded pencil sharpeners and erasers in the store visited and the pencil case range was disappointing.

Filing

All filing product at Wilkos is currently own label. They have become quite a specialist in their larger stores with a wide range of well priced filing with items such as zip wallets sold individually as well as in packs of 5. Product is displayed by colour.

Notebooks and Pads

Wilkos had a well structured notebook range with understated Wilko branded refill pads and project books in white and grey packaging as their entry range. Their mid tier range was made up of Wilko branded coloured polypro notebooks in pink or navy and black gloss paper over board notebooks. They use brands as their top tier and stock Pukka Navy, Nu Era, Nu Pop Journal and Fabriano journals in their larger stores.

The range was suitable for students and a home office customer and is partly targeted at mums who need to organise busy lives.

Diaries and Planners

There was very small range of diaries merchandised with social stationery. There was also a nice range of meal planners and weekly planners targeted at busy mums.

Lunch bags/ School bags and Licensed stationery

The following licenses were sold on lunch bags:

Frozen, One Direction, Lunch Gear, Inside Out, Dragons, Avengers, Hello Kitty all priced at £5. There were no school bags on sale in the store visited.

The following licensed stationery was sold in the store visited: Frozen, My Little Pony, Angry Birds, Marvel, Coca Cola, Hello Kitty. The offer was focussed on notebooks, stationery sets, pencil cases and novelty multi-coloured pens.

Fashion Stationery

Wilkos fashion stationery has really come on over recent years with the recruitment of new graduate designers, tapping into the latest fashion trends.

They had four fashion ranges on display in the store visited:

Varsity, a blue and pink floral and tartan range with an American twist.

Fable, a black and red ditsy floral range with a folk/ woodland twist.

Forget me not, a pale blue, cream and lilac vintage inspired range featuring 50s ladies and sewing machines, hearts and flowers.

Selfie, a pink and lilac tween range featuring cartoon girls taking selfies on a stripy pink background.

In larger stores there was a larger selection of tween fashion stationery a boys *Happy Campers* outdoor adventure range on a green background, products included a catapult pencil and toppers set. A hot air balloon range in pale pink and mini colours. There was also a photographic *Sweet Summer* range featuring a pineapple with sunglasses on an Instagram style filtered background.

There is a wide variety of product within these ranges from notebooks and filing, to mugs and novelty accessories and stationery sets.

Novelty Stationery

There was a range of pocket money pick and mix stationery priced at 18p, 35p or 50p. Products included novelty eraser packs, mini felt tip pens and crayons, and mini pencils with eraser toppers. There was a small range of stickers merchandised with craft product.

Brands

Paper	Xerox Performer
Writing	Bic Cristal, Cristal fun, Bic 4 colour pen, Miss Bic, Bic Cristal Grip, Bic Villeda markers, Bic Evolution pencils, Bic mechanical pencils
	Zebra Z-Grip, Z-Grip Smooth, Z-Grip Funky
	Papermate Inkjoy 100, Inkoy 300RT, Papermate flexigrip, PM 300, Non-stop mechanical pencils
	Berol handwriting pen, cartridge pen, fibre tipped pens
	Sharpie fine markers, Sharpie laundry pen

	Parker jotter
	Uniball eye 157, Uniball eye micro, Uniball Signo gel grip
	Stabilo Boss, Stabilo fineliners
	Staedtler Norris,
Colouring	Bic Kids
	Crayola
Accessories	Sellotape, Loctite, Pukka sticky notes, Pritt stick, Tippex,
	Maped Compass, Moondo sharpener and eraser, Boogy sharpener
	Casio calculator
	Helix ruler and maths set
	Staedtler eraser and sharpener set
Filing	No branded filing
Books and Pads	Pukka Navy
	Nu Pop Journals

B&M RETAIL

B&M is a fast growing discount retailer with over 450 stores in the UK. Their website states: *'We believe that everyone loves a bargain! Our aim is to provide customers with a fun and exciting shopping experience, offering them great products and fantastic value so that they return again and again to a B&M store. B&M offers customers a great alternative to specialist and general retailers. We sell a broad range of product categories...However, within these categories we don't over complicate things. We focus on the key best-selling products within a category, at the very best prices.'*

The store I visited in Stratford Upon Avon has been open less than a year. It was bright and colourful, had good lighting and clear product sections and displays. Unlike the pound stores, B&M are a discount retailer with ultimate flexibility on the products they can sell, with no upper price limit. Their shops are also inviting and their B&M product ranges on stationery are actually very commercial. This store had a limited range of stationery and if you wanted more choice of brands you would need to go to a specialist.



Use of Space and Visual Merchandising

There were 6 bays of stationery and 5 bays of craft in the store.

Space was split as follows:

- | | |
|-------|---|
| Bay 1 | Notebooks |
| Bay 2 | Accessories |
| Bay 3 | Writing |
| Bay 4 | Licensed pencil cases, stationery and craft sets. |
| Bay 5 | Books, sticker books |
| Bay 6 | Licensed pencil cases, stationery sets |
| Bay 7 | Canvas and artists materials |
| Bay 8 | Artist Materials |
| Bay 9 | Colouring |

Bay 10	Hobby world craft
Bay 11	Hobby world craft

In addition, there were 4 bays of Back to School Product towards the front of the store – 2 bays of stationery and 2 bays of school uniform. Smaller product such as writing and colouring was displayed hanging and larger product such as notebooks and filing was displayed directly onto shelves.

Point of Sale

There was no specific back to school POS. General B&M POS said 'Big Brands, Big Savings.'

Pricing and Promotions

There were no specific promotions on stationery product. Price tickets were in yellow with recommended retails, highlighted in the corner on some products. Generally, this store offered very good value for money and on some products such as a pack of 12 Sharpie Marker pens they were the cheapest in the market.

Product

Overall the stationery range in B&M was comprehensive and inviting. There was a good mix of best selling products and brightly coloured own label products. Perhaps due to the size of the store the breadth of the offer was limited.

Within the two bays of Back to School stationery the offer was focused on the following: Nibb pens, Sharpie 12 pack, Bumper packs of sticky notes, pencil and stationery sets, fashion pencil cases priced at £2.49, academic diaries, fashion and coloured notebooks priced between 99p and £2.99, fashion and coloured display wallets, ringbinders and lever arch files priced between 89p and £1.49.

The following was in stationery range space:

Writing

Although the writing range was quite small it did offer most of the best selling brands for Back to School, however not necessarily in the format you may want. For example Staedtler pencils were sold as part of a stationery set and Berol handwriting pens as part of a writing set. The range was weaker in the rollerball and gel category with an absence of Uniball pens and very few Pilot rollerballs. There was a lack of variety in terms of pack sizes. B&M had their own range of pens under the Nibb sub brand.

Colouring

There was a huge display of Crayola product and some product under the Hobby World sub brand.

Accessories

A small range of accessories focusing on the essentials.

Filing

All filing was B&M own label. There was a good selection of brightly coloured ringbinders (priced at 89p), lever arch files and box files. There was also a range of coloured pp filing. Some filing was merchandised quite high up so was difficult to shop but it did bring attention to the range from across the store.

Notebooks and Pads

There was a clear product hierarchy in the notebook category and a good mix of products. There were value products (refill pad for 99p), coloured notebooks (exercise books and wiro notebooks) and coloured pads (400 page refill pad for £2.49), then Nu Craze A4 wiro notebooks and B&M Retail design notebooks.

Diaries and Planners

Academic diaries were on sale at the front of the store. There was a nice range of weekly planners and list pads displayed with the notebooks.

Licensed stationery

There was a bay of licensed stationery which focused on Minions, Frozen and My Little Pony brands. Product included large sticker sheets, stationery sets and pencil cases. I did not see any licensed school bags or lunch bags on sale in this store.

Fashion Stationery

Generally, a very commercial range of filing and notebooks featuring the following fashion designs:

Keep me organised – coloured text on a black background

Owls,

Stripes and Spots

Ditsy Floral

In the Owl design there were also matching ball pens and multi-coloured pens in the writing range and matching stationery sets

Novelty Stationery

There was a limited amount of novelty stationery on offer, some pencils with animal toppers and multi-coloured pens.

Stickers were largely sold in book format.

Brands

Paper	Xerox Performer
Writing	Papermate Inkjoy 100, 300RT, Papermate ballpoints
	Berol handwriting set
	Sharpie markers
	Bic Cristal, mini 4 colour pen
	Stabilo point 88, Stabilo Flash highlighters
	Staedtler stationery set
	Pentel markers
	Pilot Frixion
	Zebra Z-Grip, mini coloured ballpoints

Colouring	Crayola
Accessories	Pritt, UHU, Blu tac, Tipp Ex, Sellotape, Oxford Maths Set and Compact maths set, Milan eraser, Textet calculator
Filing	All filing was B&M own label
Books and Pads	Nu Craze

THE RANGE

The Range currently has 40 stores and a large stationery and specialist arts and crafts section. Their website states, *'The Ranges' ethos is to present mid-price home, leisure and garden products, drawing together everything that could be needed for a stylish home, all at affordable prices.'* I visited their Rugby store where stationery was located on the first floor. The first challenge was finding the stationery department, the second was navigating the range. There were 6 specific school shop bays, however in addition to this there was a huge specialist arts and crafts department, probably second only to Hobbycraft in the market. Although there was a wide range of product I found shopping for stationery in the range to be an unpleasant shopping experience. The lighting in the store was poor and there was so much product that I felt completely overwhelmed. Product was not easy to shop or look at as the shelves were so tightly crammed with stock.



Use of Space and Visual Merchandising

Product was spread throughout the store, however here is a rough breakdown of space in the Range:

- 6 bays of specific school shop product.
- 3 bays of colouring books.
- 5 bays of licensed arts and crafts and stationery sets
- 2 Frozen merchandise bays containing an assortment of product including stationery
- 3 bays of notebooks
- 3 bays of writing
- 1 bay of accessories
- 4 bays of filing
- 1 bay of post
- 6 sticker spinners

Point of Sale

There was specific school shop POS which was white writing on a blackboard background with doodles of school items on it.

Price and Promotions

Stationery product was not on promotion in the Range. Lunch bags and bottles were on a 25% off promotion. The Range do not market themselves as a discounter and the pricing generally was on a level to supermarket pricing with branded product carrying a premium.

Product

The advantage of the Range was that there was a lot of product and once you got past the poor lighting and fixtures there was actually some really good product.

Paper

Paper was sold under the Impulse International Paper brand.

Writing

Within the school shop area there were a small amount of branded pens displayed in a mixture of ways – hanging, in cdis and shelf shippers. There was a much more extensive display in the stationery area. The Range carried a good range of brands and product, although Bic was a notable omission from the selection and there were very few Papermate products, which meant they were probably over optioned on rollerball pens and under optioned on ballpoints. Anker International filled the gap of own label writing product with their core range of product covering everything from handwriting pens, gel pens, markers, retractable ballpoints, fineliners to mini scented glitter pens. Range own label writing and accessory product seemed to focus more on arts and crafts product.

Colouring

There was quite a range of colouring brands and products on sale, some of them came under the licensed category. Again the big omissions were the two market leaders Crayola and Bic Kids product.

Accessories

There was a good range of core accessories although some of the product was hidden on dark base shelves. Some basics from Anker international and then branded product from Helix and Maped. More fun novelty product was on sale in the school shop section of the shop.

Filing

There was a comprehensive range of core filing product sold in this store. Overall there was a good choice of file dividers, organisers, wallets, punch pockets and clipboards. There was a whole bay of ringbinders and lever arch files available in different colours. However, the product was really badly merchandised and therefore difficult to shop.

Books and Pads

A large range of formats and sizes, both wiro and casebound in a large range of different designs.

Diaries and Planners

I did not see any dated product in the store visited. However, there was a large amount of kids' secret diaries.

Lunch bags/ School bags and Licensed stationery

There was a huge amount of licensed product in this store, second only to the Disney store. On licensed stationery the offer focused on filing, notebooks and small accessories in the following brands: Minions, Frozen, Jurassic World, Big Hero, Star Wars.

There was a bay of licensed school bags – mainly backpacks in the following licenses: Jurassic World, Minions, Frozen, Avengers, Disney planes, Hi-Tec.

Downstairs in the store there were 3 bays of lunch bags and bottles all on a 25% off promotion featuring the following brands:

Sistema, Speakmark insulated product, Frozen, Minions, Ultimate Spiderman, One Direction, Vintage Football, Avengers, Captain America, Polar Gear, Peppa Pig, Doc McStuffins, Jurassic World, Thomas, Disney Junior, Coca Cola.

Fashion Stationery

There were two specific fashion design ranges, merchandised in the school shop area. A brightly coloured zigzag design and a spots range featuring a white spot on a bright pink and purple background. Products in this range included ringbinders and lever arch files, notebooks – casebound and polypro, stationery set, memo block, pencil case, ballpoint pens, matching colour clips and pins and letter push pins.

Novelty Stationery

Shaped animal pushpins, paperclips, tape dispensers, erasers and sharpeners were on sale in the school shop section. All priced at £1 but the product quality was better than seen in some of the pick and mix sections of other stores. Tins containing pins and paperclips with novelty photographic designs were also on sale.

Sticker displays were from Panini (Disney), Paper Projects and Do crafts.

Brands

Writing	Stabilo easy start, S-move, Boss single, Swing cool, Neon pencils, marker pen, Neon highlighters, timetable pencils Staedtler Triplus fineliners, ballpoints Uniball needle, Uniball eye 157 and micro, Pin fineline, Signo 207, TSI, gelstick, Vision Elite Pilot Frixion, Frixion highlighters, V5 Bonus pack, Vpen, V5 colours, Zebra selection pack, Daisies, Funky colour Pentel quick dry, dual tip marker, EnerGel, ballpoints, breast cancer pink pen, Maped 4 colour pens – black and pink, Maped biros Papermate Inkjoy 100, Papermate non stop. Anker – wide range covering most genres
Colouring	Stabilo coloured pencils and felt tips

	Staedtler Ergo soft
	Lakeland coloured pencils
	Giotto
	Grafix
	Manuscript coloured pens
	Kids create – Anker International
Accessories	Blu tack original and pink
	Pritt white and rainbow,
	Pentel correction fluid,
	Maped geometry sets, erasers, sharpeners, compass, Kidygrip ruler,
	Helix Oxford maths set, Helix rulers, drawing set, eraser and sharpener,
	calculator, rubber band pack
	Staedtler eraser
	Tiger Scissors
	Rexel stapler
	Fashion stationery pencil cases
Filing	File dividers: Rexel, Exacompta, Tiger
	Plastic filing: Tiger and Anker International
	Paper over board filing: Brights by Concord, B Original, Anker International
Books and Pads	Oxford Campus, Pukka Americano, Pukka dots, Nu Craze multi pack,
	Europa notemaker, Unipad, B original, Anker refill pads and notebooks

THE WORKS

The Works has over 300 stores in the UK and their website states their mission as *'To be the customer's first choice for good quality, great value Gifts, Arts, Craft, Hobbies, Stationery, Toys and Books.'*

The Works sell both brands and own-brand products, all at discounted prices from RRP.

Use of Space and Visual Merchandising

There were 4.5 bays of Back to School Stationery and 3 bays of Craft in the store visited. The back to school bays were split as follows:

- Bay 1 Core filing, notebooks and diaries
- Bay 2 Fashion notebooks
- Bay 3 Fashion notebooks
- Bay 4 Writing and Accessories
- Bay 4.5 Licensed stationery

There was also a table piled high with filing products and diaries and an acrylic unit containing toys and pencil cases.

Pens and accessories were displayed hanging. Filing, notebooks and diaries were displayed on shelving or on tables.

Point of Sale

The Works had specific back to school POS – both headers and shelf edge strips – containing coloured Back to School writing on a black background and a logo saying 'Be Smart & Pay Less.'



Promotions

Although the main promotional marketing message of the Works is up to 80% off RRP this discount has already been applied to pricing and most prices were round price points rather than promotional prices.

Product

An interesting mix of product but a little patchy in certain categories such as writing and accessories.

Paper

Xerox paper was on a 2 for £6 deal or £3.49 when purchased individually.

Writing

The majority of the writing range in the Works was own label, focussing on packs of pens and pencils for £1 and larger packs of marker pens for £4. Overall it didn't look like a very commercial range with more marker pens than ballpoint pens for example and lots of duplication.

Colouring

There was a small colouring range in the store visited mainly focused on own label colouring.

Accessories

The accessory range had quite a few gaps to make it a balanced range. It contained 6 options of calculator and 3 options of coloured sticky note. However, it was lacking in fun pencil sharpeners and erasers. The pencil case range contained licensed, design and furry pencil cases priced at £2 and under.

Filing

The filing range was split into two. Firstly, a neon coloured expanding files and ringbinders in pink, orange and green colours.

Secondly, more serious core stationery items such as black, red and blue ringbinders, A4 30 pocket display books, A4 dividers (2x10part), 30 punch pockets and document wallets from Just Stationery. Most Items were priced at £1. Centurion box files were on sale for £3 and stacked on tables.

Notebooks and Pads

There was a large range of notebooks in the Works the large majority of which were hardcover notebooks in A5 and A4 sizes with a design on the front priced at £2 or £3. Some of the designs were quite unusual and one customer did comment, 'that's nice, I've never seen them anywhere before.' There were also some pu textured notebooks priced at £2 and £3. There was a small range of branded Nu product – Nu era 120 page orange wiro notebook and a Nu Era A5 casebound notebook both priced at £1.50.

Diaries and Planners

There was a large range of black, red and navy professional 2016 diaries. Also 2015-16 academic diaries and school year planners for mums both plain and with designs.

There was also a small cardboard fsdu containing wall planners.

Licensed Stationery

There was a wide range of licensed stationery as follows:

Minions A4 ringbinder, A5 notebook, filled pencil case,
Disney Princess 10 colour pen, A5 notebook,
Doc McStuffins 8 colouring pencils, 8 marker pencils,
Disney Cars 8 felt tip pens,
Despicable Me 2 ball pens, 4 gel pens, 5 piece stationery set,
Star Wars rebels 3 pencils with toppers, 2 ball pens, 4 gel pens, 5 piece stationery set, pu
barrel pencil case, filled pencil case,
Furby notebook set, 3 erasers, 3 pencils, Secrets Book,
Frozen A5 notebook

Fashion Stationery

There was a small range of Owl design fashion stationery on a purple background. There were also fashion ball pens in various designs.

Novelty Stationery

There was a large stand of Fun Stickers 2 for £1. There were also a range of bendy pens, which were on a 2 for £1.50 offer.

Brands

Paper	Xerox Performer
Writing	Zebra Sarasa
	Helix duo tip pen
	Helix ballpoint pens
Colouring	Helix colouring pencils
Accessories	Helix Oxford ruler, Eraser and Sharpener set, Stationery set, Compact maths set, Clear Pencil case.
	Blu tack
	Bostik all purpose glue, Glu and fix super glu
	Snopake glue stick
	Tippex
	Pentel correction pen
	Pritt Stick
	Texet calculator
Filing	Centurion
Books and Pads	Nu Era notebooks

POUNDLAND

Poundland now have over 590 stores in the UK. According to their website, *'Poundland's retailing concept is extremely simple: a range of more than 3,000 items – representing AMAZING VALUE for money.'* I visited their Stratford Upon Avon Store early on in the promotion, even then the store was buzzing, full of customers looking for a bargain and interested to see what Poundland had to offer in the way of stationery. The craft department was very busy with customers shopping for kids' summer holiday activities. Even though they were shopping in a pound shop one customer did comment when looking at craft packs, 'I'm not going to buy that for a £1, it's going to fall apart pretty quickly.'

Use of Space and Visual Merchandising

There were 9 bays of stationery and 4 bays of craft split in the following way:

Bay 1	Post and Adhesives
Bay 2	Post and Accessories
Bay 3	Writing
Bay 4	Filing
Bay 5	Notebooks, mainly Nu.
Bay 6	Craft
Bay 7	Craft
Bay 8	Neon filing
Bay 9	Dated calendars and 2016 diaries
Craft bay 1	Crossword puzzles
Craft bay 2	Licensed product
Craft bay 3	Colouring
Craft bay 4	Kids craft accessories

Point of Sale

All of the POS in Poundland reinforced the *'Amazing Value'* message. The Back to School POS emphasised branded items on sale with photographic images of Papermate, Bic, Zebra, Helix Oxford and Nu product with branded logos above this. To the left of this was a black school crest with white text on a red ribbon saying 'Poundland, School of Amazing Value, £1, Poundus Victorious'. The advertisements over the store's radio also emphasised the big stationery brands that you could buy for a £1.



Promotions

Obviously everything in Poundland is £1. However, there were some items on promotion such as Fun sticker packs where you could buy 2 for £1.

Product

A large proportion of the stationery offer is non branded some labelled as Home Office in red and white packaging. The majority of the craft and colouring product is sold under the Great Expressions brand trademarked to Poundland.

Paper

A4 multipurpose paper was available from Nu in a 150 sheet format. Packs of 120 Pastel Paper were also available non branded.

Writing

There was a range of branded products from Bic, Pilot, Papermate and Zebra merchandised at the top of the writing fixture which gave the writing range more authority than in previous years. There was also a Bic fsdu. More than half the range was made up of non branded pen packs ranging from 6 to 20 units in a pack – ballpoints, gel pens, permanent markers, glitter pens, coloured pens, coloured fineliners, mechanical pencils. The challenge that Pound shops in general are always going to have when putting together a credible back to school display is that the writing category is a key part of the campaign. When looking at the average price point across writing products in the appendix it came out at £3.62. Even if Pound shops entice brands to sell them market leading product they only have two routes to go down; sell single units of branded pens or sell branded product that has a lower specification in order to hit a £1 price point, which is effectively what Poundland have started to do this year.

Colouring

There was a large range of colouring product sold under the Great Expressions brand. The colouring products did represent great value for money - 48 wax crayons, 10 washable markers, 6 jumbo markers, 12 colouring pencils, 8 triangular markers, 30 colouring pencils. Colouring is an area which is incredibly price sensitive in the market and as they give craft and colouring such a large amount of space I should imagine it's a category that sells very well in a Poundshop.

Accessories

The accessories range mainly focused on core stationery – packs of tape, adhesives labels, glue, scissors, elastic bands, calculators, rulers, memo blocks. There were a few brightly coloured filled pencil cases, coloured pins, clips and elastic bands. There was very little branded stationery and very little choice in the way of fun school accessories that you might put in your pencil case for school in the stores I visited.

Filing

Filing product was non branded. There was good core range as follows: 50 punch pockets, 5 pack popper wallets, 20 A4 dividers, 20 holder files, coloured display books, expanding files, desk trays, clipboards, A4 ringbinders and A4 ringbinders with dividers and ruled paper inside. There was also a neon range of filing products in bright pink, orange, blue and green products.

Notebooks and Pads

There was a good assortment of notebooks and considering they were all priced at £1 there was a lot of choice. Half a bay was given to Nu Vibe product. There was also a Nu Varsity twin pack reporters pad. The remaining product was a mixture of wire notebooks and refill pads (300 pages, 60gsm paper), coloured hardback casebound notebooks (A6 options available in twin packs) and project books in fashion designs (70gsm paper).

Diaries and Planners

There was a whole shelf of 2016 diaries and 4 options of academic calendars.

Licensed Stationery

There was almost a whole bay of licensed product, including the following:

Ultimate Spiderman and Avengers stationery sets and sticker books

Bin Weevils stationery sets, notebooks, pencil cases.

Minions mini art case and pencil case.

Sticker sets and sticker books in the following licenses: Disney Princess, Sofia the First, Teenage Mutant Ninja Turtles, Doc McStuffins.

Fashion Stationery

There was very little fashion stationery apart from a few design notebooks. There was a lot of focus on brightly coloured and neon coloured stationery and bringing product together into brightly coloured bays.

Novelty Stationery

There was a small amount of novelty stationery – snail pencil sharpeners, flower pen and highlighter pens, maze pens and fluffy pens.

Brands

Paper	Nu
Writing	Bic mini 4 colour, Bic Grip 4 pack, Bic Briteliner highlighters 2 pack, Bic round Stic 8 pack, Bic Matic mechanical pencils 3 pack, Pilot Soda range – all sold as singles, Pilot G1 single Papermate PM300 2pack, Papermate Inkjoy 100 5 pack, Papermate coloured biro 7+3 pack, Sharpie fine single Zebra Daisies twin pack, Zebra Funky Brights twin pack
Colouring	Crayola dual colour marker. Crayola 4 Extreme markers
Accessories	UHU glu, Blu tack original Tippex, Bic correction fluid, Oxford stationery set, Oxford 12 pencils, Helix ultraflex geometry set
Filing	There was no branded filing
Books and Pads	Nu Vibe

99p STORES

According to their website '99p Stores is the UK's second largest single price point retailer, with over 250 stores nationwide and 2 million customers every week.' I visited two 99p stores over the course of the promotion. They were not as busy as Poundland stores and were really lacking in atmosphere and theatre. There was no specific Back to School point of sale or marketing campaign and shelf edge strips simply said 'Everyday great VALUE 99p.'

Use of Space and Visual Merchandising

There were 6 bays of stationery and art and craft product split as follows:

- | | |
|-------|---|
| Bay 1 | Colouring and activity books |
| Bay 2 | Craft and Colouring sets |
| Bay 3 | Craft and pencil cases |
| Bay 4 | Craft, notebooks, diaries and ringbinders |
| Bay 5 | Writing sets, tape, refill pads and carry folders |
| Bay 6 | Glue sticks, filing, notebooks, envelopes |

There was also a spinner of 2 for 99p stickers from Fun Stickers.



Product

The product offer was focused on core stationery and kids' art and craft product.

Art and Craft, Colouring and Novelty Stationery

The first part of the 99p stores offer was focused on arts and crafts/ novelty product – colouring books, a whole bay of craft sets including craft glues, make your own kits, neon paints, shaped mini highlighters, tattoo pens, glitter glue sets, sparkly glitter, spinning top pens, jumbo crayons, scented markers, neon paints, oversized pipecleaners, novelty erasers and butterfly laptop stickers all under the Kids Stuff brand, and craft kits under the sequin fun

and creative crafts brand. The third bay of the range contained more adult artist products such as artists' brushes and sketching pencils. Also drawing and sketching pads, canvases and bumper packs of reward stickers. There were two shelves of pencil cases, all barrel shape, with spots, skulls and geometric designs.

Licensed Stationery

There was half a bay of licensed stationery made up of stationery sets, activity sets and sticker packs mainly from Anker International stationery. The following licenses were sold:

Disney planes 2 activity sets,
Peppa Pig roller stamper pens,
Disney cars and One Direction stationery sets,
Skylanders giants and Minions sticker packs,
Minnie mouse pencils and pencil cases,
Justin Bieber pencils with toppers.

Core Stationery

There were two and a half bays of core stationery mostly in blue and red packaging. The offer focused on bumper packs of product: 5 handwriting pens, 6 highlighters, 8 ballpoint pens, 10 markers, 30 pencils, 4 rolls of tape, 4 balls of string, 6 glue sticks, 15 pack of plastic file dividers, 5 zip seal bags, 3 ruler sets, 35 C5 envelopes, 65 DL envelopes, 70 sheets of copier paper. Notebooks, refill pads, 2016 diaries, ringbinders and lever arch files were all sold as single units. There was a small collection of design product within these categories but most of it was plain coloured.

Brands

There was only one mass market branded product on sale which was Blu tack original.

There were however other subbrands used as follows:

Kids Stuff

Creative Craft (HTI Group)

Study Office School (99p stores brand)

Just Stationery (Tallon international)

ALDI

Aldi's website claims '*Spend a little. Live a lot. If you want amazing value, but don't want to compromise on quality, come on in.*'

Aldi launched their school uniform in store on 23rd July 2015. The Back to School offer was primarily focused on clothing with a small display of licensed school bags and lunch bags. Branded pens and own label refill pads and filing appeared at the beginning of August. The stationery range was small and focused on licensed product.



Use of Space and Visual Merchandising

Product is displayed in metal fixtures in the centre aisles of the store.

Point of Sale

Aldi school shop POS featured coloured school shop branding on a blackboard background and photographic POS of children wearing Aldi school uniform.

Promotions

Product was not on promotion and was sold at set price points.

Product

The range was very simple this year and although the price points showed good value for money the product quality was average, comparable to other discount retailers.

Writing

The only pen brand stocked was Papermate Inkjoy packs of 5, both coloured, black and blue options priced at 99p.

Script 8 highlighter pens and Script 8 permanent markers were sold for 89p.

Colouring

There were no colouring pens on sale. However there were a range of kids' colouring books.

Accessories

All accessories were licensed – see below.

Filing

There were Script branded packs of pp files and folders as follows:

5 pack carry folders (popper wallet) £0.89

20 pack cut flush folders £0.89

5 pack management files (reporters files) £0.89

Later in the month a Script metal storage box was on sale for £9.99.

Notebooks and Pads

Script branded books and pads were on sale at the following price points:

A4 hardback wiro notebook 80gsm 100 sheets £1.79

A4 script project book 80gsm, 80 sheets £1.79

A4 refill pad 80gsm, 150 sheets £1.79

Diaries and Planners

There were no diaries on sale.

Fashion Stationery

There was no fashion stationery on sale.

Novelty Stationery

There was no novelty stationery on sale.

Lunch bags/ School bags and Licensed stationery

Licensed barrel pencil cases were available in Disney Princess, Star Wars and Frozen brands priced between 99p and £1.99

Licensed lunch bag and bottle sets were available from Minnie and Star Wars priced at £6.99.

Licensed notebooks were available for £1.79 in Frozen, Minions, Star Wars and Disney Princess.

A bumper pack of 575 stickers was available in Disney Princess, Frozen, Minnie Mouse and Ultimate Spiderman brands priced at £2.99.

LIDL

I only found one Back to School product display in Lidl and it was a Bic fsdu double sided with all items priced at £1.79 each or 2 for £3.





BACK TO SCHOOL 2015 MARKET RESEARCH REPORT

PART TWO – ONLINE

ALEXANDRA MILES
BRIGHT DISPOSITION LTD

BACK TO SCHOOL WEB SEARCHES

Online retailers were reviewed at the beginning (31st July 2015) and end (4th September 2015) of the Back to School promotion.

On the 31st July 2015 I carried out a google search on 'Back to school' and the results are listed below. Companies spend a lot of money on search engine optimisation so I was interested to see who would appear on the all important first page of searches.

1) Tesco

F&F clothing comes first in google and takes you to the Florence and Fred website www.clothingattesco.com.

2) River Island

Focus of the marketing is on school uniforms and school bags under the banner 'Back to Cool'.

3) Very

Focus on school uniforms but also a large section on kids stationery and teens stationery.

4) Matalan (Made for Modern Families)

Focus on school uniforms.

5) Aldi

Focus on school uniforms in special buy section.

6) Sports Direct

Range of character and licensed stationery and schoolbags

The second search on 31st July 2015 was on Back to School Stationery and brought up the following search results on the first page of Google:

1) The Works

Buy great value school stationery ready for the new term. Discover a range of Back to School Stationery at fantastic prices.

2) Wilko.com

Browse stationery and office supplies at Wilko. We have a huge selection of low priced stationery and supplies for your home and office.

3) John Lewis

Shop for Back to School Stationery from our Baby and Child Range at John Lewis.

4) Tesco.com

Tesco direct: Back to School – Kids school essentials – school uniforms, bags, backpacks, stationery, books, laptops and other back to school items.

5) Asda.com

Back to School. Study Essentials. Check out our great range of notebooks, pens and calculators and everything else they need for their first day back.

6) Ryman.co.uk

Find everything you need for the start of the school year.

7) Pound World Plus

Buy Back to School Stationery online at Poundworld plus. Your pound shop favourites from Poundworld now available to buy online.

8) School Stationery

Great value back to school stationery for boys and girls of all ages, we supply parents and teachers at amazing value, plus free delivery on orders over £40.

These searches were repeated on 4th September 2015. Firstly, the Back to School Search brought up the following results on the first page of Google:

1) Sports Direct.com

Get the kids kitted out and ready to go back to school. Take a look through our fantastic collection of bags, water bottles, clothes, footwear, stationery and more.

2) Matalan

*Back to school boys and girls school shop
Fit your kids out for less with Matalan's autumn back to school range.*

3) River Island

Back to School girls school Clothes. From everyday bags to smart boots, we've got everything she needs to head back to school in style.

4) Very

View all Back to School at very.co.uk. Discover our huge range and get outstanding deals in the latest View all Back to School from Very.co.uk.

5) Tesco

Back to School essentials. Tesco direct: Back to School – kids school essentials – school uniforms, bags, backpacks, lunchboxes, stationery, books, laptops.

6) Florence and Fred

*www.clothingattesco.com/ school-uniform.
Send your little ones back to school in style with the school uniform range from F&F.*

7) BHS

All school uniform. Back to School. Our Generous Fit school uniform is comfortable and perfect for any classroom.

Secondly, Back to School Stationery was searched on 4th September 2015 and the following websites appeared on the first page of google:

1. Tesco.com

Tesco direct: Back to School – kids school essentials, school uniforms, bags, backpacks, lunchboxes, stationery, books, laptops.

2. Wilko.com

If you're after new stationery you've come to the write place! Get top marks when its time for the new term with our range of school essentials.

3. The Works

Buy Back to School Stationery from the Works. We offer huge savings of up to 80% on a great range of Back to School products.

4. WHSmith

We couldn't be more excited to introduce our Back to School stationery collections full of fun and fashionable designs, colours and textures.

5. John Lewis

Shop for Back to School Stationery from our Baby and Child range at John Lewis. Free delivery on orders over £50.

6. Asda

Whether they need hardwearing uniforms, reams of stationery or that must have backpack, you'll find everything you need to get them...

7. Ryman

Find everything you'll need for the start of the school year from the essentials, to the thing you didn't think you'd need, along with a handy stationery checklist.

8. Amazon.co.uk

Shop our selection of Back to School stationery and school supplies at everyday low prices.

9. Paperchase

Back to School 3 for 2 Stationery at Paperchase. 3 for 2 Stationery shop now...Shop the Back to School Catalogue at Paperchase.

10. Sports Direct

School stationery is a must have for any kid in the classroom so make sure yours are heading back to school with a full pencil case.

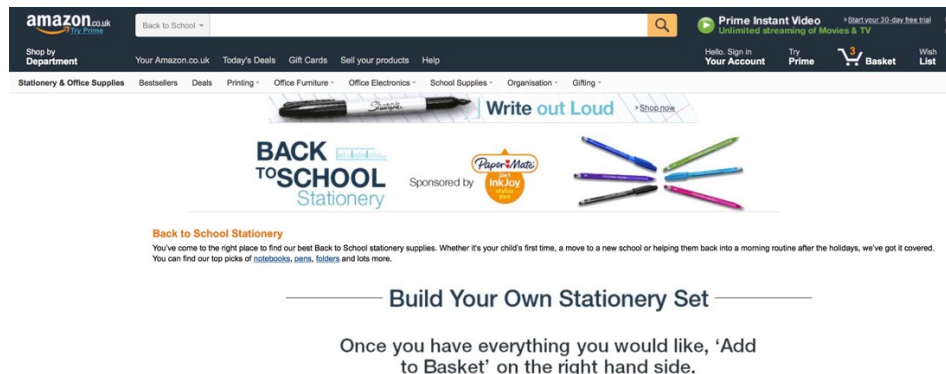
So what can we conclude from this information? Firstly, the biggest market for Back to School is still clothing seen by the focus on school uniforms in the first general search. Secondly retailers who sell both clothing and stationery such as Tesco and Sainsburys aren't always very good at linking the purchases online or even the associations in their SEO. Sometimes it is because they have different websites, often I suspect it's because the products are bought by different buying teams. The potential for cross selling stationery to consumers shopping for uniforms and vice versa is huge and often under potentialised. Finally, the searches show the amount of online retailers who are very active at this time of year and who wouldn't necessarily be front of mind for stationery and school product – Very and Sports Direct being two examples.

There were also quite a few paid advertisements which came up in the searches. These were from Sainsburys, Clarks, Boots and Tesco but also from smaller companies mainly for personalised stationery. For example personalised pencil tins from www.totalmerchandise.co.uk. Personalised pencils, pencil cases, bags and lunchboxes marketed as 'the perfect back to school gift' from www.ijustloveit.co.uk.

2015 ONLINE SUMMARY BY RETAILER

A full summary by retailer of their 2015 online highlights is below:

AMAZON



Amazon is great if you are a savvy shopper and know exactly what stationery products you are looking for. They did have a Back to School page (sponsored by Paper Mate) with an edited range but I didn't find it particularly useful and it was really slow to load. If you have a large family and are likely to reach the £20 threshold for free delivery in the UK then you can save money by doing your back to school shop on Amazon. Part of Amazon's strategy is to sell every product possible whether it is stocked by Amazon or a reseller. There are thousands of stationery products on Amazon and the offer is focused on brands. Often products are in larger pack sizes so you do have to multibuy, for example Oxford Campus notebooks are available in packs of 3 and 5. There is a large presence of office product brands (such as Tiger/ QConnect/ Rexel Joy/ 5Star) which are not necessarily geared up for the back to school market and are more likely to sell in bulk. Searching for a typical own label product such as one black ringbinder, the cheapest one I could find was £2.30 so I would have got a better deal offline. However they did come out cheapest on quite a few branded products (see appendix for price comparison). There are two other drawbacks with Amazon. Firstly, you don't always get the most trend led product – their selection of Pukka notebooks for example, sold through Vow, is dated and targeted at the office products market rather than the trend led retail market. Secondly, not all product is available through Amazon, for example HP Everyday Printer Paper is sold by resellers therefore another delivery would be necessary.

eBAY

ebay ran an email marketing campaign at the end of July about school uniforms putting them front of mind early on in the promotion. They had 63231 stationery items listed and the majority of these were Buy it now items rather than auctions. Products were mainly multipacks and bundles. As with Amazon you need to know exactly what product you are looking for with so many products listed. You also have to shop around a little more to make sure you are getting the best deal on ebay as it's a large online market place. Buying from an assortment of resellers on ebay you don't necessarily get the reassurance of one delivery that you are more likely to get buying from a brand such as Amazon.

MATALAN

The focus on the Matalan website was on school uniforms. There were 59 products in the lunch bags and school stationery section mainly focused on licensed and fashion stationery. The range was focused on notebooks, pencil cases, scrapbooks, stickers, stationery sets and pens, pencils and erasers. Licensed brands sold were Disney Frozen, Polar Gear and Minions. Own label fashion stationery ranges included Monster, Woodland animals and Vintage designs.

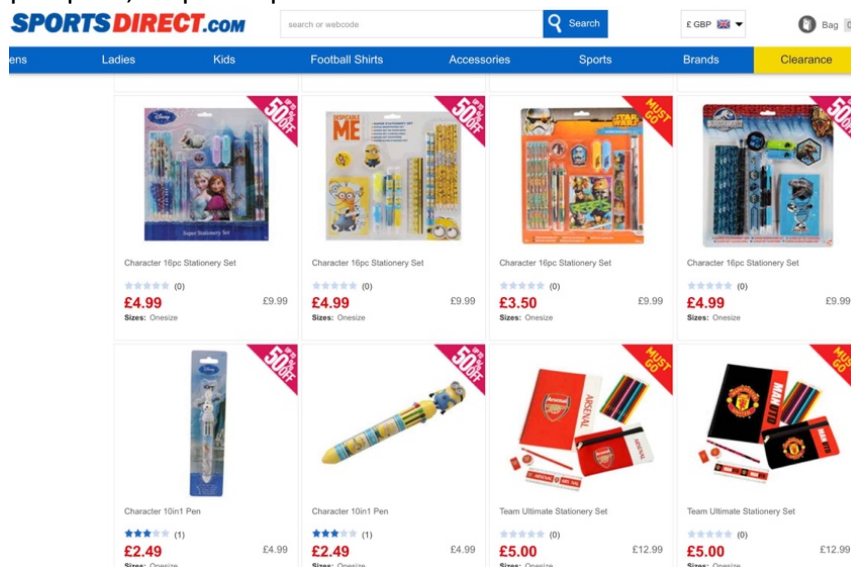
ASOS

Somewhat surprisingly Asos had a tiny online stationery offering of 62 products focusing on gift stationery. They stock the following brands: Cath Kidston, Undercover, NPW, James and friends, Little Miss, Peanuts, House of Holland, Ohh Deer, Kelloggs, Vintage 50s, Katie Leamon, Mi-Pac, Happy Jackson and a small amount of Paperchase product.

They had a large range of 324 upmarket branded school bags, mainly backpacks with price points between £5 and £199. If you want to buy a high quality fashion rucksack this is the place to shop. They stock the following brands: Diesel, Vans, Asos, Milk it, Fila, Lacoste, Sandqvist, Hype, River Island, Oasis, Mi-Pac, Herschel, Eastpak, Matt & Nat, New Look, New Balance, Aldo, Vans, Ted Baker, Jack and Jones, Converse, Fred Perry, Royal RepubliQ, Fred Perry, Hype, Adidas, Nike, Superdry, Element, Barbour.

SPORTS DIRECT

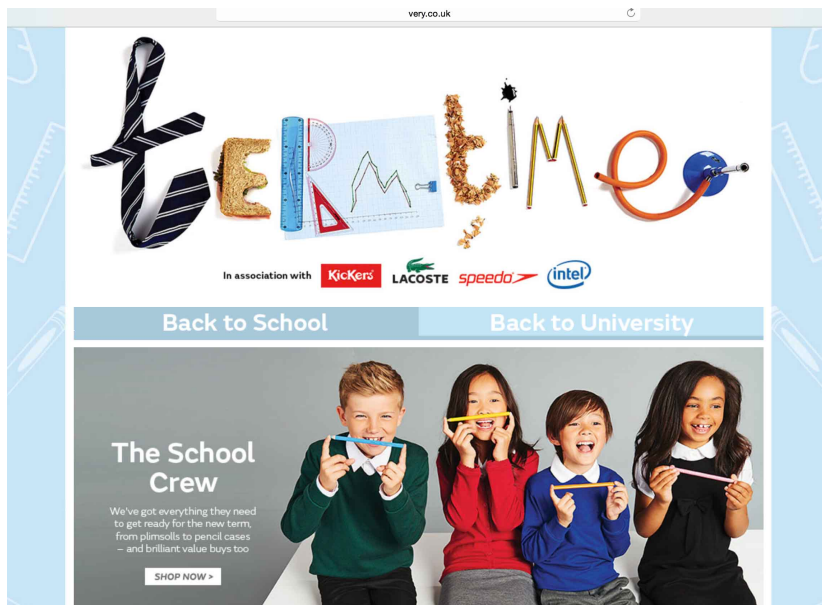
The Sports Direct website featured 166 stationery products. Most of the product had a sports theme often football team specific. They also stocked a range of other licensed and character stationery mainly stationery sets and character pens under the following brands: Despicable Me, Star Wars, Jurassic World, Frozen and Disney Princess. There was a small range of essential stationery items priced at 90p and branded as 'Signature'. This included a ballpoint pen pack, 50 punch pockets and an A4 wiros notebook.



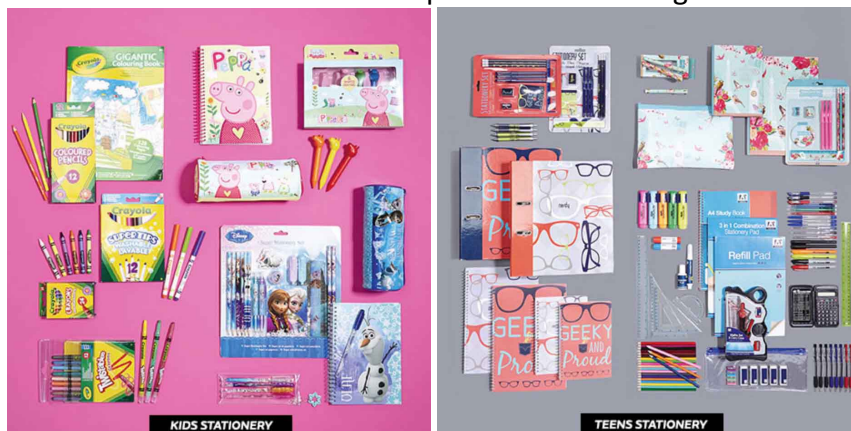
The School bag range was larger and featured 199 products. Again the range featured a wide selection of merchandise from branded football teams. In addition, there was product from Nike, Puma, Karrimor, Disney, Mini, Frozen, Firetrap, Slazenger, Adidas, No Fear, Lonsdale,

Soulcal. The range included back packs, daysacks, rucksacks and gym bags. Prices started at £2.99 for a Moshi Monster infant backpack to £29.99 for Nike YA Max Air B Pack 54.

VERY



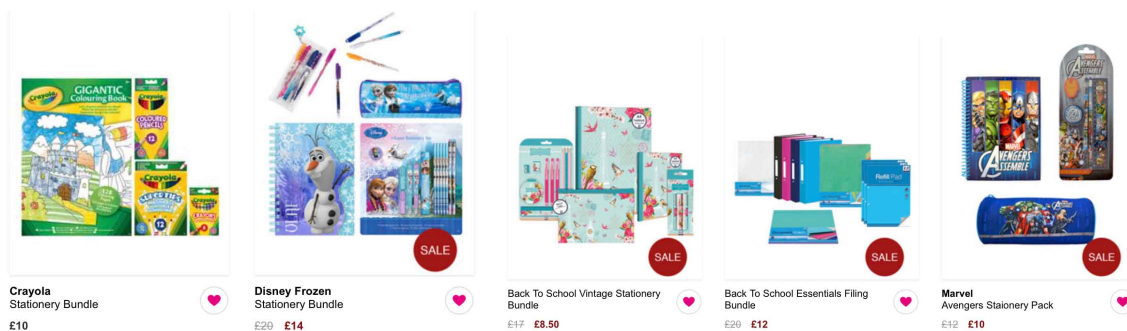
There was a large focus on Back to School both on school uniforms and on kids and teens stationery. There were 90 items in the kids' stationery section, 52 items in the teen stationery section and 85 items in the backpacks and lunch bags section.



The Kids section mainly focused on licensed stationery including stationery bundles and larger pack sizes of art cases and colouring. Brands stocked were as follows: One Direction, Union J, Minnie Mouse, Doc McStuffins, Crayola, Hello Kitty, Me to You, Peppa Pig, Thomas and Friends, Disney Princess, Disney Cars, Disney Frozen, Star Wars, Sofia the First, Minions, Mickey Mouse Clubhouse, Marvel, Paw Patrol, the Avengers, the Gruffalo.

Most bundle packs contained between 3 and 5 licensed products (including notebooks, pencil cases, and stationery sets for example) and were priced between £6 and £15.

There were 18 Crayola bundles priced between £8 and £30.



In the teen section there was a large selection of themed bundle packs from Anker International. Both stationery essential packs Maths Bundle/ Accessories Bundle/ Filing Bundle/ and themed fashion stationery bundles Neon Bundle/ Vintage Bundle. All bundles were priced between £17 and £20 at the beginning of the promotion but were all reduced by £8 at the end of the promotion. There were also themed bundles from football clubs such as Manchester United, Arsenal and Chelsea. They also sold personalised pencil cases and pencils.

Very had the largest and most impressive selection of licensed lunch bags and backpacks in the market ranging in price from £6 for a book bag to £25 for a 4 piece Peppa Pig luggage set. The following brands were stocked: Paw Patrol, Batman, Marvel, Disney Frozen, Minions, The Avengers, Jurassic World, Spiderman, Disney Princess, Disney Cars, Union J, Manchester City, Star Wars, Disney Planes, Manchester United, Teenage Mutant Ninja Turtles, Furby, Doc McStuffins, Sofia the First, Jurassic World, Peppa Pig, Transformers, Care Bears, Shaun of Sheep, Superman, Hello Kitty, Spongebob Squarepants, In the Night Garden, Paw Patrol.

TESCO

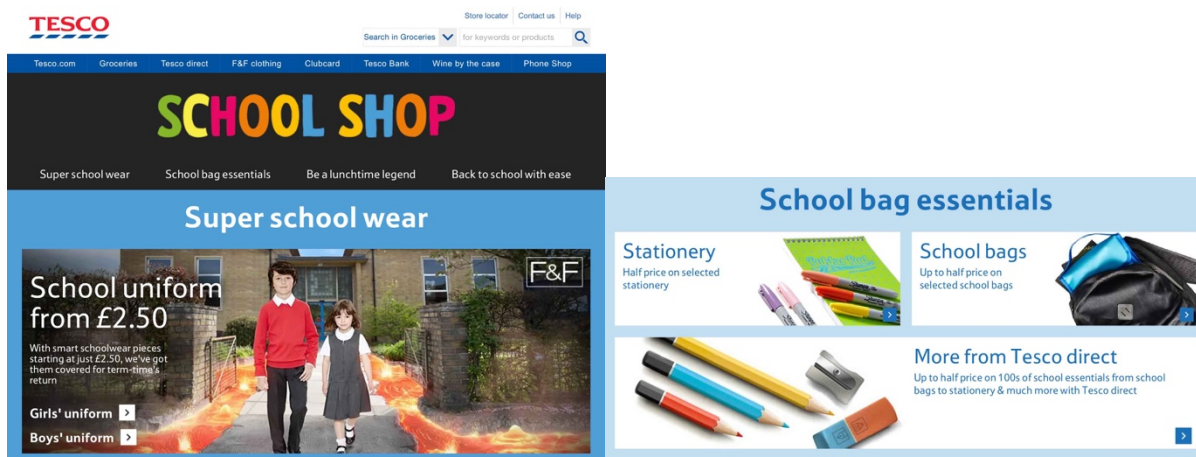
Impressively Tesco School Shop came up straight away on Tesco's homepage on 4th September 2015. There was then a click through to a School shop page where you can either click through to the Florence and Fred School uniform site or browse other back to school products on the Tesco direct site.

There was a fantastic 30 second video on the Florence and Fred website featuring two children as super heros putting their school uniform to the test. This certainly created online theatre!



The links from the Tesco direct site back to the F&F site were great. Unfortunately, there was no link back to the Tesco direct site from the F&F site and when I searched stationery on the F&F site it came up with zero results, which was a missed opportunity for Tesco.

Back to the Tesco Direct site the Schoolshop page was strong with continued use of the blue and black colours that had been used in store.



The Stationery page was focused entirely on the up to half price product deals, mainly from top selling brands. There were only 56 stationery products displayed and 20 of these were out of stock.

There were 26 school bags of which 3 were out of stock. There were some additional school bags available online through the Entertainer and included the following licenses: Skylanders, Sofia, Doc McStuffins, Spider-Man, Disney Pixar Cars. Coca Cola school bag was available online from Tesco.

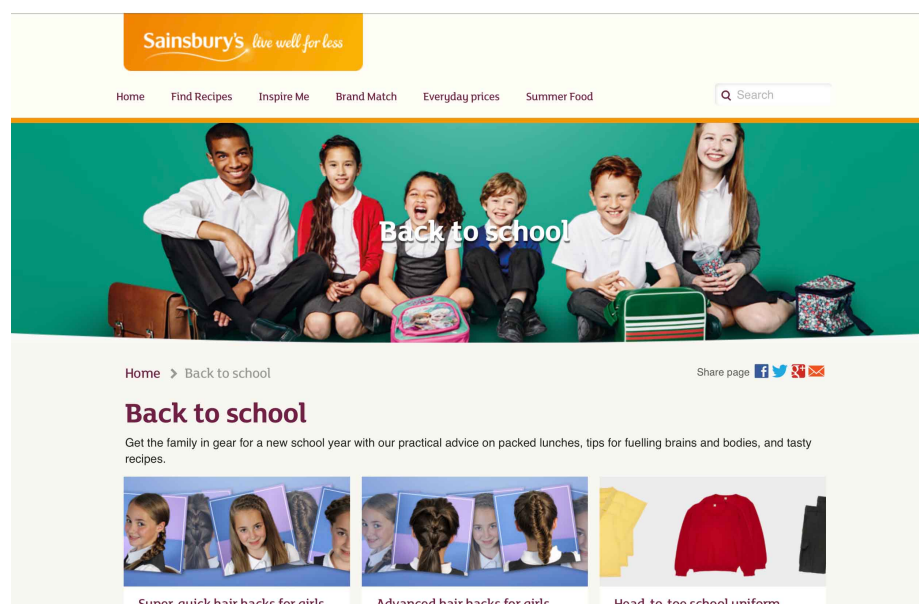
Pricing online was consistent with in store pricing. HP Everyday paper had been discounted on September 4th by a further 75p to £3.25. I did a further search on stationery which came up with a full range of stationery that wasn't in the original search and a stationery clearance section. Overall I thought the marketing was good and they had a large product selection in all stationery categories. The navigation from the Back to School pages to the main stationery pages could be improved with a click through button to the main stationery range.

SAINSBURYS

Sainsburys didn't have any reference to Back to School on their homepage. I did a search on Back to School which brought up 131 stationery products. The offer focused on items that were part of the Back to School range, mainly pens, accessories and colouring. Many branded items had been further reduced to clear up to half price or 70% off. There was also a Go Stationery fashion stationery range. A further search on stationery brought up 365 products containing a good range of core stationery items.

Sainsburys school uniform was available on the Tu website but there were no links back to the rest of the back to school range.

A further google search revealed the Live well for less website with a full page about back to school. However once again the offer was focused on clothing and groceries and didn't connect stationery. Overall conclusions were the Sainsburys' online stationery product offer was good but the marketing and navigation of the Back to School message was poor.

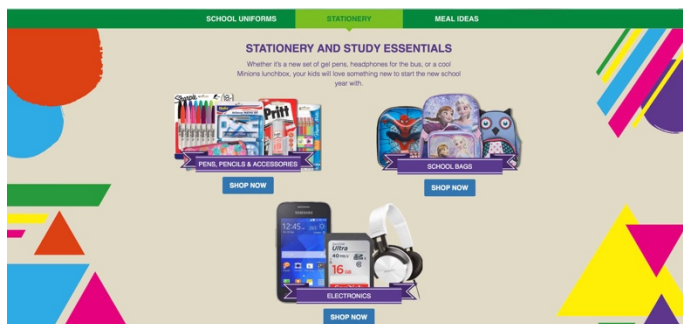


MORRISONS

Morrisons had 125 stationery products on their website. As in store they had a condensed range of best selling branded products and Morrisons own label product. There was also a small amount of licensed product. Their online offer and pricing mirrored their in store offer.

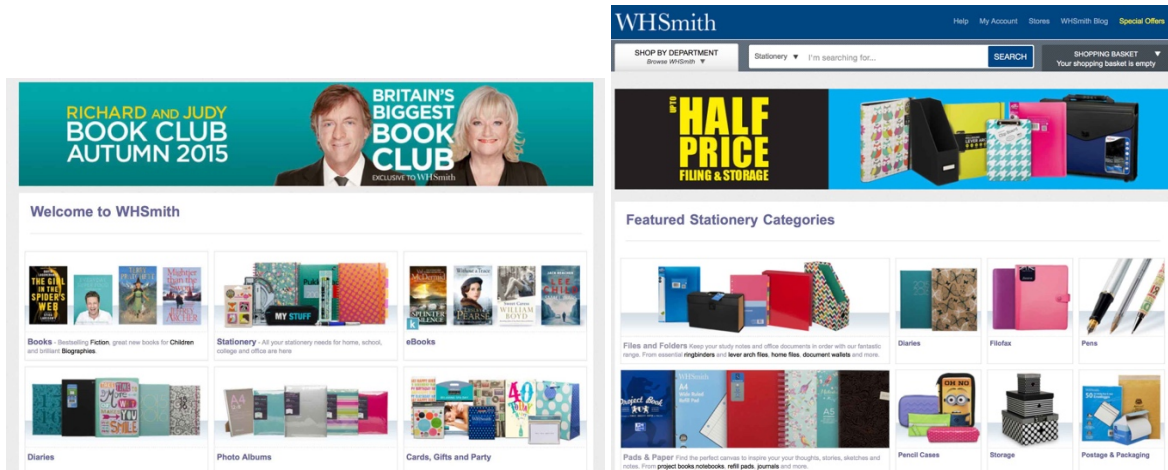
ASDA

Overall the Asda online graphics for their back to school campaign were bright, colourful and enticing. Asda's online back to school shop was clearly sectioned into school uniforms, stationery and meal ideas. Clicking onto stationery then gave a menu of pens, pencils and accessories, school bags and electronics. The Stationery menu then went into a further page where you could choose from pens, pencils and accessories, pads, printer paper and ink and electronics. What I liked about this was that it continually cross referenced to other product categories, even on the uniform page, the same menu was available to click back to another category. The price points and offers were very clear and consistent within store. You could also filter on 2 for £3 deals. The overall stationery product offer was comprehensive. There did seem to be two pages for school bags and lunch boxes, which was a little confusing. One was on the George website and one on the Asda website.



WHSMITH

The WHSmith home page on 4th September 2015 was surprisingly understated with very little mention of back to school apart from an advert for its polka dot range at the bottom of the page. I expected to find something more exciting when I clicked through to the stationery page but that was also very understated with only a tiny Back to School icon in the bottom right hand corner of the page. Free delivery over £20.



They did have a very nice blog page, with some good lifestyle photography of their fashion ranges:



Stationery	(9386)
Bags and Backpacks	(71)
Calculators	(27)
Calendars	(946)
Cash Boxes	(3)
Diaries	(592)
Erasers and Correction	(54)
Files and Folders	(558)
Filofax	(233)
Glue, Tape and Adhesives	(70)
Legal Forms	(220)
Lunchbags and Bottles	(148)
Maths Sets and Measuring	(86)
Pads and Paper	(989)
Pencil Cases	(142)
Pencils	(196)
Pens	(996)
Postage and Packaging	(78)
Punches and Fasteners	(67)
Scissors and Cutting	(2)
Stickers and Labels	(175)

In terms of product selection there is a disclaimer on the website saying 'Prices and availability in WHSmith stores may vary significantly.' The range is certainly bigger online and 9386 items came up when searching for stationery. There were definitely additional licensed collections online that were not in the stores I visited such as Emma Bridgewater Rose and Bee collection, Caroline Gardner stationery, Mr Men, Marvel, Coke Americana, Peanuts and Henry Holland.

WILKINSONS

Wilko's website was colourful and fun. On the homepage a banner advertisement flashed up with their campaign message 'Get Student Life Sorted'. You could then click through to stationery, then to a Wilko Stationery page featuring a menu of Back to School products. The online stationery range is bigger than in the majority of stores and the prices looked consistent with store pricing. The website was very strongly branded both with the Wilko brand and the 'Stay low price' marketing campaign. The site also featured a back to school checklist of product to buy.

The website also featured a blog about their fashion stationery trends. Free delivery over £50.

The screenshot displays the Wilko.com homepage. At the top, the Wilko logo is prominent, followed by a navigation bar with links to various departments: Garden, Outdoor Living, Home, Kitchen, Decorating, DIY, Housewares, Storage, Pets, Stationery, Health & Beauty, Toys, and Offers. A search bar is also present.

The main banner features the 'GET STUDENT LIFE sorted' campaign message. Below this, a 'Student essentials checklist' is provided, organized into three columns:

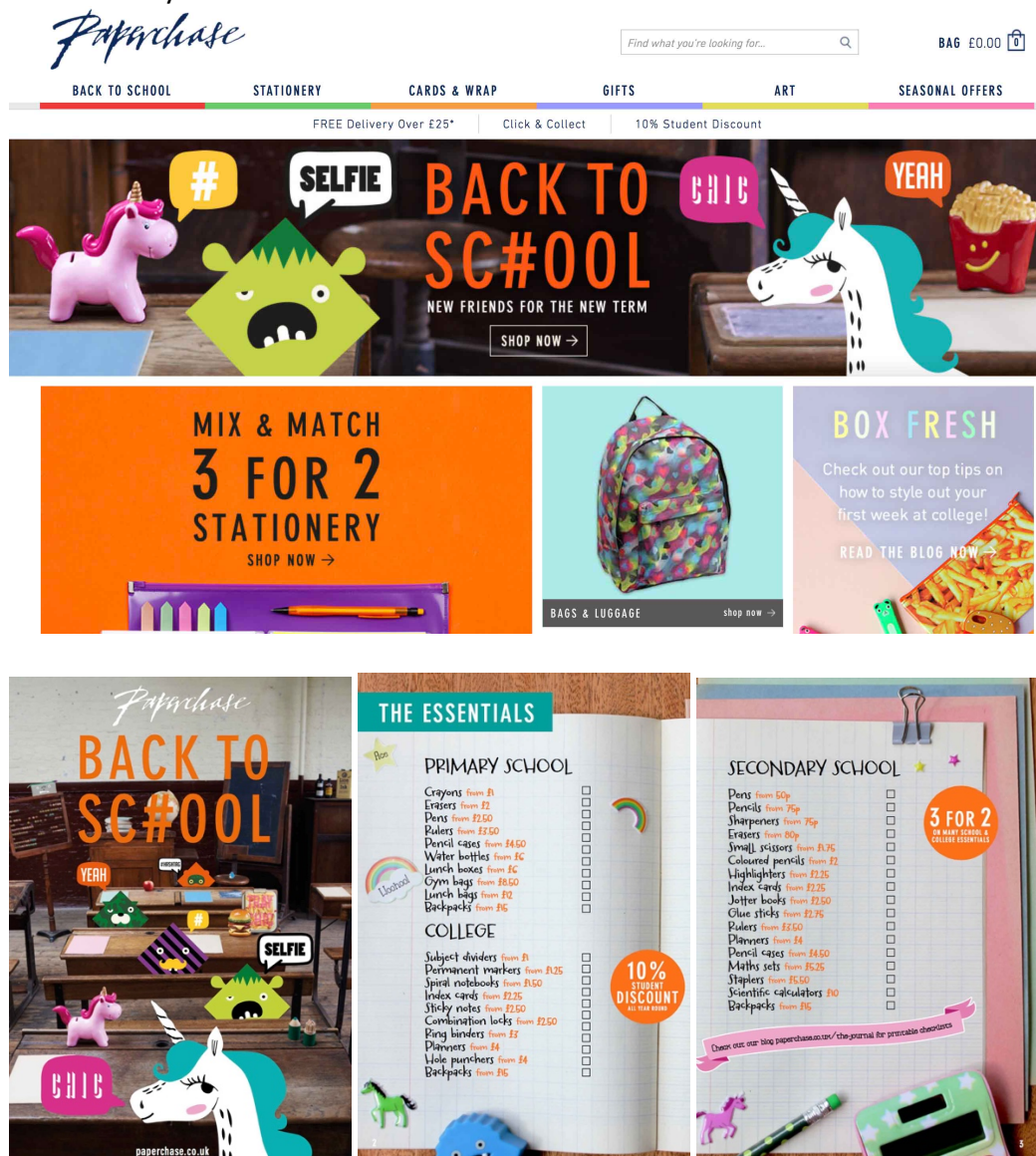
Stationery	Cleaning	Kitchen
☐ Pens & pencils	☐ Iron & ironing board	☐ Kettle
☐ Highlighters	☐ Clothes alier	☐ Toaster
☐ Rubber & ruler	☐ Pegs	☐ Microwave
☐ Folders & files	☐ Laundry basket	☐ Dinner set
☐ Notebook & pads	☐ Mop	☐ Mugs & glasses
☐ Stapler & hole punch	☐ Brush	☐ Cutlery
☐ Blu-tak	☐ Kitchen bin	☐ Scissors
☐ Diary	☐ Washing up bowl	☐ Can opener
☐ Calendar	☐ Washing up liquid	☐ Chopping board
☐ Dictionary/Thesaurus	☐ All-purpose cleaner	☐ Saucepan set
☐ Calculator	☐ Toilet cleaner/bleach	☐ Wok & frying pan
☐ Printer & paper	☐ Laundry detergent	☐ Kitchen tool set
☐ Shredder	☐ Cloths	☐ Tea towels
☐ Memory stick	☐ Bin bags	☐ Oven glove
☐ Notice board	☐ Kitchen & toilet roll	☐ Food storage

Below the checklist, a section titled 'Wilko Stationery' showcases various calculators with 'play low price' tags:

- Casio Calculator Scientific FX-83GT Plus**: £6.00, 10 reviews, 'add to basket'
- Wilko Calculator Scientific**: £3.00, 2 reviews, 'add to basket'
- Wilko Desktop Calculator**: £2.00, 2 reviews, 'add to basket'
- Wilko Calculator Pocket**: £1.95, 1 review, 'add to basket'

PAPERCHASE

The Paperchase website is always a joy to shop – sometimes I even prefer it to their stores! The homepage features a link to their new stationery collections and is well navigated for back to school with a black banner with orange text at the top. There was a click through button to all Back to School product or you could click through to individual categories which were navigated with beautiful lifestyle photography on the homepage: Back to School Collections/ Mix and Match 3 for 2 Stationery/ Bags and Luggage/ Pencil Cases/ Lunch accessories/ Scrapbooks/ Notebooks. There was also a link to a Paperchase inspirational blog. Pricing and promotions are consistent in store and online. There was also a fantastic catalogue featuring their back to school collections and a schools list, available both in store and online. Free delivery over £25.



SMIGGLE

Just like their store, Smiggle's website is a really exciting place to shop. As soon as you click on their homepage you know this is going to be different with moving banner ads featuring cool kids. The homepage also highlighted promotional offers such as 40% off write packs when you spend £15, pop classic bottles £5 and get a free back to school pack when you spend £50 or more. New products were highlighted at the bottom of the homepage. The Australian personality of the brand is kept throughout the website through the language they use describing offers as hot and awesome. Everything about this website is interactive from flashing ads, to games you can play, to online videos showing you how to use novelty product. There was even a form you can fill in to tell Smiggle what new products you want or a wishlist form to tell your friends what Smiggle goodies you want. There was also a catalogue you can download to select your favourite products. You also have a choice as to how you shop your product. You can shop by new arrivals/ catalogue/ collection/ best sellers or colour. Or there are more conventional drop down menus as follows: latest offers/ writing & desktop/ pencil cases/ books/ bags/ food & drink/ time & tech/ fun & games/ gift shop/ sale. The only downside is standard delivery is £4.50 in the UK and unlike most other websites which have free delivery over a certain amount Smiggle doesn't have an upper limit. Definitely the most exciting and interactive Back to School website.

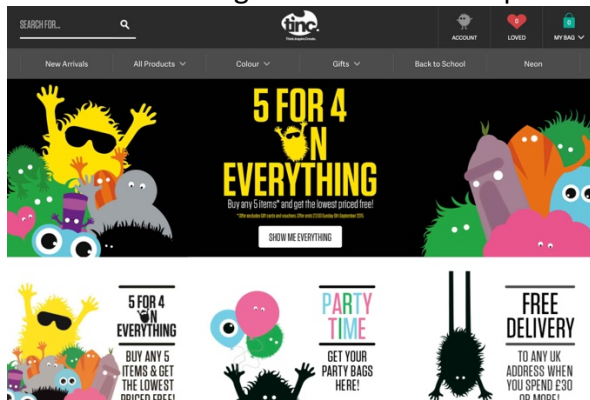


TINC

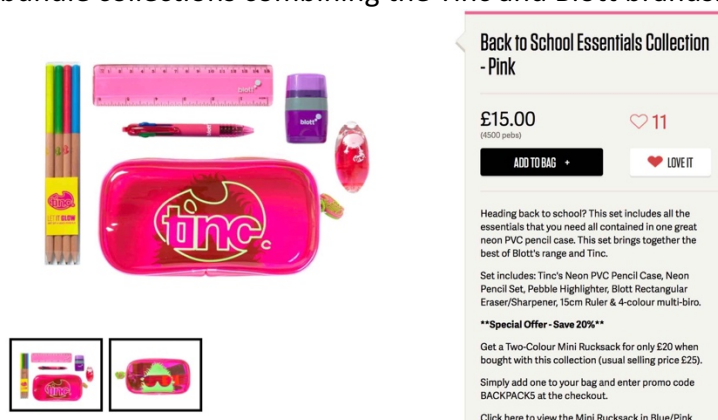
Tinc has 21 stores in the UK and product is also sold in John Lewis. They sell erasers, notebooks, pencil cases, pens, pencils, accessories, party bags and invites, home and lifestyle products, gadgets, travel, bags and luggage, desk and school stationery. Online they describe themselves as... 'A colourful, creative world of extraordinary stationery, gadgets, clothing and accessories. Tinc is an inspiring place where kids of all ages, whether 4 or 44, can come to feed their imagination and re-discover the joy of making, learning and doing. It's up to you. Tinc – Think. Inspire. Create.'

Earlier in the year Tinc acquired the business and assets of competitor Blott.

All product on the Tinc website was Tinc or Blott branded. Tinc product was available in five primary colours: pink, blue, green, black and white. In store product is merchandised in these colour stories. Pricing was top end but product is good quality. They were running a 5 for 4 on all items during the Back to School period.



They had a clearly navigated Back to School section on their website with an edited selection of products from Tinc and Blott on their back to school page. The full range of product was available in drop down product menus. They have put together new neon collections and bundle collections combining the Tinc and Blott brands.



Overall it's a nice website and very easy to shop. It doesn't have the wow impact of Smiggle but I suspect it's targeted at a slightly wider target audience. One to watch now they have combined their product offer with Blott.

JOHN LEWIS

There was a tiny Back to School link on the John Lewis homepage which took you through to a page selling school shoes. Stationery was really hard to find but was eventually located under School Accessories. There were 199 products ranged under stationery a mix of John Lewis essentials, branded writing and accessories and licensed/ novelty. Brands stocked online were as follows: Stabilo, Maped, Uniball, Parker, Pukka filing, Staedtler, Helix, Sharpie, Lamy, Crayola, Berol, Pritt, Faber Castell, Casio, Sellotape, Paper Mate, Peanuts, Mi-Pac pencil cases, /tinc, Rachel ellen, Cath Kidston, Mr Men, Gruffalo, Osco, NPW, Hoot tea party, Suck UK, Art File, Navigate, Happy Jackson, Little Joule, Animal, Mustard, Art Attack, House of Holland. They had an eclectic mix of product but I'm not convinced that I could get everything on a Back to School stationery list online at John Lewis. For example, the Casio calculator and Berol handwriting pens were out of stock. Pricing was consistent with in store pricing. A save 20% promotion had been applied to writing branded product running until 6th September 2015.



Under school bags the following brands were sold: John Lewis, Adidas, Converse, Mi-Pac, Eastpak, Nike, Tinc, Herschel, Fred Perry, Disney Frozen, Cath Kidston, Lelli Kelly, Babymel, Hello Kitty, Cambridge Satchel Company, Spiral. Prices ranged from £8 for a John Lewis gym bag to £85 for a Herschel backpack.

WAITROSE

There were 46 stationery products on the Waitrose website, 27 products were on offer. The range and pricing was consistent with the store range with a mixture of Waitrose essential product, Waitrose farmer's market floral range, Gant colouring product and branded pens and accessories.

The screenshot shows the Waitrose website interface. At the top, there's a navigation bar with categories like Groceries, Offers, Favourites, Fruit & Veg, Fresh, Dairy & Eggs, Bread & Cakes, Food Cupboard, Frozen, Wine & Drinks, Household & Pet, Beauty, Baby, and Summer Eating. Below this, there's a search bar and a 'New to Waitrose.com?' section with a postcode checker. The main content area displays a grid of stationery products on offer. Each product card includes an 'OFFER' badge, a product image, the product name, a brief description, the current price, the original price (crossed out), and a 'Be first to review' prompt. The products shown are:

- Xerox performer A4 copier paper, pack of 500 sheets. 25% OFF. Now £4.12 (8.2p per 10 sheets). Was £5.50.
- essential Waitrose reporter's lined notebook, pack of 150 sheets. 15% OFF. Now 75p (5p per 10 sheets). Was £1.00.
- essential Waitrose A4 ruled refill pad, pack of 80 sheets. 10% OFF. Now 94p (1.2p each). Was £1.05.
- essential Waitrose 162x229mm C5 white envelopes, pack of 25. 20% OFF. Now £1.87 (7.5p each). Was £2.30.
- essential Waitrose A4 ruled notebook, pack of 80 sheets. 20% OFF. Now £2.00. Was £2.50.
- Uni-ball fine eye rollerball pen, pack of 2. 2s. save £1.20. Was £4.00.
- essential Waitrose C6 white envelopes, pack of 50. 20% OFF. Now £3.00. Was £3.75.
- essential Waitrose A5 plain writing pad, pack of 50 sheets. 20% OFF. Now £2.50. Was £3.13.

STAPLES

The Staples student offer was highlighted on their homepage banner and you can click through to see all deals. From this point on things got a little confusing and hard to navigate with products and deals grouped into slightly random categories such as study aids.

The range was easier to shop by going into individual drop down menus, which then showed a large selection of products within each category. Within each menu banner ads highlighted leading brands. Pricing did differ to in store and there were some web only deals.


[My Orders](#) | [My Lists](#) | [New to Staples.co.uk?](#) | [Order by item no.](#)

Spend only £36.00 more to get

FREE DELIVERY

WELCOME, PLEASE SIGN-IN

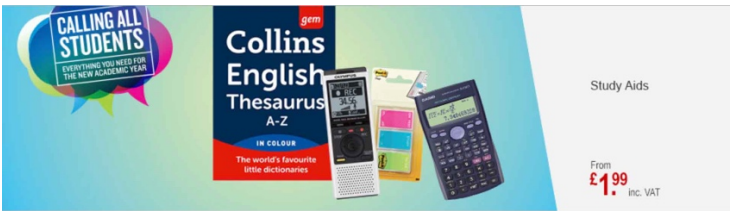
[My Account](#) ▼

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[OFFICE SUPPLIES](#) ▼ | [TECHNOLOGY](#) ▼ | [INK & TONER](#) ▼ | [COPY & PRINT](#) ▼ | [FEATURED BRANDS](#) ▼ | [SPECIAL OFFERS](#) ▼

DEALS OF THE WEEK SAVE 10% CANON MG2450 3-IN-1 INKJET PRINTER, PRINT, COPY, SCAN [SEE DEAL](#) →





Post-it® Super Sticky Lined Inc VAT £1.99 Each Item # WW-403859 Buy	Olympus VN-415PC White Voice Recorder Inc VAT £39.98 Each Item # WW-426151 Buy	Casio FX-85GTPUS Scientific Calculator Inc VAT £10.00 Each Item # WW-381002 Buy	Collins Thesaurus A-Z Inc VAT £3.49 Each Was £9.40 You Save: £6.00 (63%) Item # WW-419463 Buy
Olympus VN-732 PC (4GB) + Micro SD Inc VAT £59.99 each Item # WW-424204 Buy	Stabilo Boss Highlighters Wallet Inc VAT £2.00 package 4 each Item # WW-117739 Buy WEB EXCLUSIVE		



RYMAN

Ryman had a really strong Back to School homepage with a neon banner clicking through to a Back to School shop where categories were clearly navigated using bright images. Prices and promotions were consistent with instore. A really good website.



B&M RETAIL

B&M Retails homepage emphasised a summer sale, university offers, and a 2 for £20 toy sale. There was however a click through to 'View Back to School' under a school uniform banner. This then clicked through onto a school uniform and stationery page, which was clearly navigated into stationery categories using product images both of branded and B&M product. Price points were also highlighted in orange. The range is an edited version of what is in store and price points are consistent. New product is highlighted with a blue roundel. There is a good mix of fashion, essential and branded stationery product.



THE WORKS

A well navigated range with a clear 'Back to College from £1' banner on the home page clicking through to a back to school checklist and stationery range.

The screenshot shows the 'Stationery' section of The Works website. On the left is a vertical navigation menu with categories like Academic Diaries, Batteries, Binding & Laminating, Calendars, Computer Accessories, Desk Accessories, Diaries, First Aid Supplies, Files & Folders, Gift Wrap, Greetings Cards, Kids Stationery, Notepads, Office Stationery, Packaging & Adhesive, Paper Shredders, Pens & Pencils, Printer Ink Cartridges, Printer Paper, School Stationery, Stationery Supplies, Sticky Notes, Storage Boxes, and USB Sticks. The main content area features a large 'BACK To COLLEGE' banner with a 'FROM £1' tag and a 'SHOP NOW >>' button. Below the banner are four category tiles: 'Back to College', '2016 Diaries', 'Storage Boxes', and 'New & Trending'. At the bottom, there are two more promotional tiles: 'NOTEBOOKS FROM 99p SHOP ALL >>' and 'PAPER SHREDDERS FROM £15 SHOP ALL >>'.

ALDI

The Aldi website is really used to market their product and special buys and is non transactional. The Back to School campaign on the website was about school uniforms and did not feature any stationery. A two minute video entitled, 'see what our little experts really think of our uniform range' reinforced the value message of Aldi. To quote 'When I saw the price of the uniform I was absolutely shocked, you get so much more for your money at Aldi.' The Back to College campaign launched on 28th August 2015 and also didn't feature any stationery online.

LIDL

There was no information about Back to School or stationery on the Lidl website.

POUNDWORLD PLUS

Poundworld Plus featured 67 items in their Back to School stationery section. Most of the range was essential stationery product such as refill pads, bumper backs of ballpoint pens, handwriting pens and glue sticks. There were some design notebooks. There was no branded product, however there was some licensed product – Frozen and Minions stationery sets, notebooks and multi coloured pens. Most items were priced at £1, but there were two backpacks – Frozen and Minions priced at £3.99 and some home expanding files priced at £4.99.

POUNDLAND

Poundland launched online deliveries on 3rd September for a cost of £4, unless you spend £50 or more! The Stationery section was well navigated. There was an edited range of product online compared to in store and the brands that they do sell are highlighted both in photography and at the top of each product page with a value message being reinforced.

Stationery



Amazing Value

99p STORES

There was no mention of Back to School on the 99p stores website. However, there was a clear menu for stationery, which then led into three sub categories: Artist Colouring and Craft, which contained 20 products; Mail Packing and Office, 18 products; Everyday Stationery and Paper Pads, 28 products. The website is non transactional and encourages you to search for your nearest store.

REPORT CONCLUSION

In part one of this report I outlined the details of what makes a good Back to School Campaign as being:

- Knowing your target market
- Price and Promotional tactics
- Use of brands v Own label
- Operational Implementation
- Using Space well and Visual Merchandising
- In store theatre and Marketing
- Timing
- Point of difference

Hopefully by this point in time you will have your own opinion on which retailer had a good campaign and you will have seen hard sales facts to back this up. My own personal view is that when considering all of the above criteria two retailers came out on top: Tesco and Wilkinsons. Both retailers had clear and competitive pricing strategies; a targeted offer at the school shopper but with enough range that other personas would also buy into deals; a good mix of own label product with branded trade ups; clear enough product statements that operational implementation across stores seemed consistent; good use of secondary space and cardboard fixtures; a commercial POS and marketing campaign that ran across all channels including their website. Tesco stood out as having the point of difference with their large variety of bundle deals creating a buzz in store.

Key trends and new product are highlighted visually in part three of the report. 2015 was definitely the year of the neon/bright colour statement with retailers such as Tesco, Asda and WHSmith going for big and bold, brightly coloured product in key selling space, rather than fashion designs. Bundle packs and deals were another common theme – a trend started by the WHSmith Sharpie deal a few years ago. Generally, retail theatre was lacking and there seemed less POS in some stores than in previous years. However, some brands such as Papermate made up for this with large displays of branded POS. In terms of kids trends 2015 was definitely the year of the novelty eraser. Interestingly, as we will see in part three 2015 has also been the year of the adult colouring book.

The big question everyone was asking at the beginning of the campaign is what will be the impact of discounters? Well undoubtedly people are now shopping around more but it's still not possible to buy everything from a school's list in a discount shop, particularly if you need branded product. Product quality also varies. Likewise, with online – the offer hasn't been completely refined yet so you need to shop around.

It's been an exciting year in retail with changing market conditions. As we begin to plan next year's campaign, engaging and attracting increasingly disloyal customers will become the main challenge for retailers in 2016.

One final thought as my facebook page fills with kids' first day of school photos this week, (who in years to come will be buying your product!), what are we doing as an industry to

become omnichannel? In my experience there is a tendency to sometimes see technology as the enemy of the stationery industry. There is an increasing consumer trend to research purchases online before actually buying; how many stationery brands are set up for this? Many of the stationery brands I researched are set up for trade, not consumer enquiries. In the future, smart brands will need to reinvent themselves digitally to engage with future generations of end consumers, who could be buying from a wide variety of sources.

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PLEASE CONTACT [INFO@BRIGHTDISPOSITION.COM](mailto:info@brightdisposition.com) FOR MORE INFORMATION.



Back To School 2015

NEW Product



NEW electro colours added to the Sharpie range. NEW Inkjoy mini pens. Customise your pencil with Papermate clearpoint.



NEW Erasables writing products to challenge Pilot Frixion's market share. Replay by Papermate and Signo TSI by Uniball



NEW signage in WHSmith



NEW Festival design range from Stabilo



NEW Rabbit sharpener from Maped



NEW Stick & Switch tape dispenser from Henkel

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Back To School 2015 NEW Product and Packaging



NEW product and packaging from Staedtler on this FSDU in Staples.



Stabilo branded bay featuring NEW product in WHSmith.



ADULT COLOURING

It's a craze that is taking the nation by storm, known for relieving stress and its cross over with mindfulness. Three out of Amazon's current top ten books are adult colouring books. Although adult colouring books were mainly sold from secondary space such as fsdus and tables and not back to school space, the sales of associated colouring pens are sure to have seen a massive uplift as a result of this trend.

Back To School 2015 NEW Notebooks & Filing



ENTER HERE

There's a different question every month and you can enter as many times as you like. At the end of the month we'll choose the most creative responses to win the cash prize (or prizes).

You can also enter on Twitter or Instagram. Upload your pic with #LoveYourThinking and @OxfordNotebooks and we'll send you a link to

NEW Filing range from Oxford Campus on sale in Staples. They also have NEW Durable Cover polypro notebooks. Marketing inside their NEW ringbinders highlighted the whole range and the 4 year guarantee on their filing products. They are running their cinema ticket competition again on social media and in addition are giving away money in their 'love your thinking' competition.

Nu Craze stripes range available in Asda and Nu Varsity range in Sainsburys.

Nu continue to promote their free app, which converts your notes to digital files. You can choose a Nu pad cover design for each file. A great example of using stationery and technology together.



Back To School 2015 NEW Notebooks & Filing



NEW Pukka Pad Neon range in Tesco
(available in pink, blue, green and black colours).



NEW Pukka Pad Neon Notebooks in Asda
(available in pink, purple, blue and orange colours).

NEW Pukka Pad black polypro neon range in Staples.



NEW Pukka Pad
Scented cover
strawberry scratch
and sniff notebooks
available exclusively in
Tesco.



Back To School 2015 Notebook and Filing Bundle Packs



Pukka Pad
Neon bundle
was £20 / now £7
366-1360

Also available
in neon blue,
244-6630

**Better than half price –
was £20, now £7***

STAEDTLER
Staedtler stationery collection
was £20 / now £7
390-0604

BIC
Bic Kids colouring pack
was £20 / now £7
632-7856

Sharpie
Sharpie 28-piece set
was £20 / now £7
415-4244

*valid from 29/07/2015 to 04/09/2015. Selected stores.
Products subject to availability - while stocks last.



It was the year of the Bundle Pack with Tesco, Sainsburys and Morrisons all backing branded Bundle packs.

Left: Tesco leaflet highlighting better than half price Bundle deals. Wall of Pukka Pad bundle packs in Tesco.

Below Nu Craze bundle deal in Morrisons. Pukka Pad navy bundle in Sainsburys.



Back To School 2015

Innovative POS and Display Solutions



Bic Bus repeated from last year.

Papermate tunnel in Staples and POS in WHSmith.

Back To School 2015 Novelty Eraser Trend



Novelty Eraser
sets from
Smiggle sold at
£4.50 for a set.



Eraser table in Paperchase



Small Accessories in WHSmith

Back To School 2015 NEW Product and Packaging



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Back To School 2015 Colour and Design Trends

TREND: Brights/ Neon/ Block Colour



Clockwise from top: WHSmith, B&M Retail, Poundland, Asda Living, Tesco, Milan erasers in WHS, the Works, WHSmith filing, centre WHSmith refill pads.

Back To School 2015 Colour and Design Trends

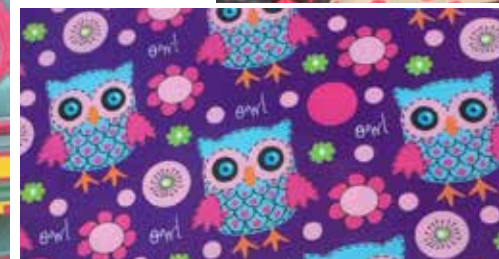
TREND: Spots/ Stripes/ Zigzags and Stars



Clockwise from top: Tesco, John Lewis backpack, John Lewis lunch bag, Paperchase notebooks, George satchel, House of Holland in JL, WHSmith, Staples, B&M Retail, WHSmith, Paperchase.

Back To School 2015 Colour and Design Trends

TREND: Owls



Clockwise from top: B&M Retail, Asda pencil case, WHSmith lunchbag, George rucksack, Tesco, WHSmith Bramble Wood, the Works, Go Stationery in Sainsburys, ijustloveit, B&M Retail, Smiggle.

Back To School 2015 Colour and Design Trends

TREND: Monsters and Camouflage

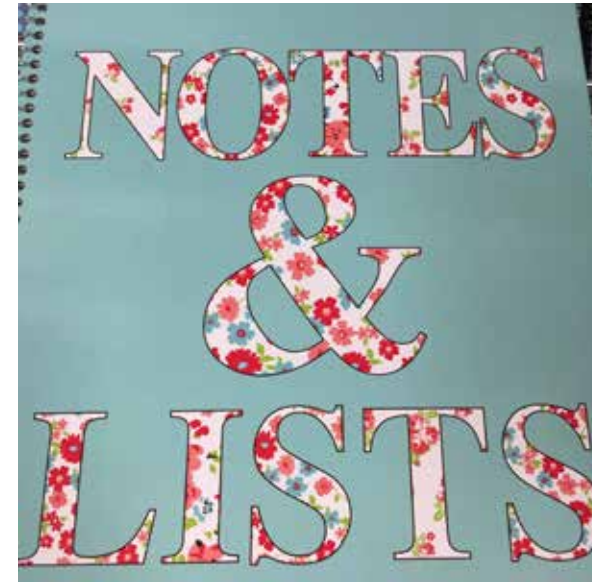


Clockwise from top: Matalan, Paperchase snack boxes and monster window display, the Range, Gola gym bag in Sainsburys, Tesco lunchbag, Matalan lunchbag, WHSmith, Smiggle.

Back To School 2015 Colour and Design Trends



TREND: Vintage Florals



Clockwise from top: Caroline Gardner in John Lewis, B&M Retail, Sainsburys fashion ranges, John Lewis bag, Tesco ditsy floral, Waitrose wild rose, Sainsburys, Tesco, centre Asda and Tesco

BACK TO SCHOOL 2015 Branded Price Points

All prices shown are single unit prices and do not include multibuy promotions such as 3 for 2
With the exception of Amazon all prices shown were recorded in store not online during August 2015

Most expensive price per item

Cheapest price per item



Category	Brand	Product	Colour	Pack size	Price Points by retailer																							
					Tesco	Sainsbury's before 18th August	Sainsbury's	Aldi	Morrisons	Waitrose	John Lewis	Pencaresha	Wmthn	WHS Travel	Ryman	Staples	Wilkinson	B&M Retail	The Range	The Works	Poundland	99p store	Amazon	Aldi	Lidl			
Writing	Sharpie	Sharpie permanent marker fine	black	1			from 19th August																					
	Sharpie	Sharpie permanent markers fine	mixed	4			£4.00		£2.00		£3.00						£2.99	£1.99	£3.98	£0.99			£1.00					
	Sharpie	Sharpie permanent markers fine	mixed	12	£5.00	£10.00	£7.50																		£3.41			
	Papermate	Papermate flexigrip	black	2		£2.00	£1.50	£2.00	£2.00			£10.60	£12.75	£13.99				£3.29	£3.49	£5.00	£4.99							
	Papermate	Papermate flexigrip	black	5		£2.50	£4.00	£3.00	£3.00									£5.99	£7.99						£2.50			
	Papermate	Papermate inkjoy stick	mixed	5																								
	Papermate	Papermate inkjoy stick	mixed	10																								
	Bic	Bic Cristal Ballpen	black	4	£1.00		£1.50											£4.99	£3.99	£0.50	£1.50	£1.49	£1.99	£1.00	£2.00	£0.99		
	Bic	Bic Cristal Ballpen	black	4			£1.50											£3.99	£4.99									
	Bic	Bic Cristal Ballpen	mixed	4			£1.12	£1.50										£3.99	£4.99									
Writing	Bic	Bic Cristal Ballpen	black	10	£1.50		£2.00	£2.00	£1.50									£4.99	£4.99	£1.79	£1.99	£1.50				£1.50		
	Bic	Bic Cristal Ballpen	blue	10	£1.50		£2.00	£2.00	£1.50									£4.99	£4.99									
	Bic	Bic Cristal multi colour fun	mixed	10	£2.00		£2.50	£1.87	£2.00									£4.99	£4.99		£1.99	£1.50						
	Bic	Bic Cristal Grip	black/ mixed	10	£2.00		£2.00	£1.50	£2.50									£3.99	£1.49	£4.99	£1.99	£1.25						
	Bic	Bic 4 colour clicker original	mixed	1			£1.00	£1.50										£1.49	£4.99									
	Zebra	Zebra 2-Grip	black/ mixed	1			£2.00			£2.00	£2.50	£3.00						£3.99	£4.99						£2.50			
	Uniball	Uniball eye UB157	black/ blue	1		£3.00						£2.50	£2.50					£4.99	£2.99		£1.25							
	Uniball	Uniball eye UB157	black/ blue	2						£2.80											£2.75							
	Uniball	Uniball eye UB157	black/ blue	3			£4.00	£3.00	£4.00			£5.20						£6.99	£6.99									
	Uniball	Uniball eye needle	black/ assorted	3	£4.00		£4.00	£4.50										£6.49	£16.99						£4.00			
Writing	Pilot	Pilot VS	black	1	£5.00		£4.00					£5.50						£7.99	£9.49							£4.30		
	Pilot Frixion Stick		black	1								£3.75	£3.50							£3.99								
	Pilot Frixion Stick		assorted/ blue/ black	3																								
	Berol	Berol handwriting pens	blue	1	£3.50	£6.00	£4.50	£4.50				£9.25		£2.00				£8.99	£5.99			£5.99				£3.50		
	Berol	Berol handwriting pens	black	2	£1.75	£2.00	£1.50	£1.50	£2.00									£3.99	£4.99	£3.99	£0.75					£1.75		
	Berol	Berol handwriting pens	blue	2	£1.75	£2.00	£1.50	£1.50	£2.00									£3.99	£4.99	£3.99	£0.75							
	Staedler	Staedler blue highlighters	black/ mixed	4		£3.00	£1.00	£1.00	£2.00		£3.74	£3.25						£4.99	£4.99	£4.99	£0.75							
	Staedler	Staedler Noris pencils HB		5		£1.50	£1.12	£1.80				£3.00	£1.60					£3.49	£4.99	£3.99	£4.99	£1.60	£1.59			£2.00		
	Staedler	Staedler Noris Stationery Set																							£1.60			
	Staedler	Staedler Noris Stationery Set			10 pencils, eraser and sharpener		£1.50																					
Colouring	Crayola	Crayola coloured pencils	mixed	12			£2.00	£1.50										£2.99										
	Crayola	Crayola wax crayons	mixed	12														£2.99	£2.99		£1.99	£1.80	£0.99					
	Crayola	Crayola wax crayons	mixed	24	£2.00	£2.00	£1.87	£1.87	£2.00									£1.99	£2.99			£0.95	£1.00					
	Crayola	Crayola Twistables crayons	mixed	12	£2.00	£2.00	£1.87	£1.87	£2.00		£3.00							£1.99	£2.99	£3.49		£2.00	£1.99					
	Crayola	Crayola supersmiles washable	mixed	12			£1.87	£1.87	£1.99									£2.99	£5.99	£3.99	£2.00							
	Toppen	Toppen rapid		1	£0.75	£1.50	£1.12	£1.60	£1.00		£1.60							£2.51	£1.99	£2.59		£1.00	£1.49					
	Casio	Casio B-855T PLUS		1	£4.50	£10.00	£7.50	£5.00	£5.00			£8.95						£7.99	£14.99		£7.99					£4.50		
	Casio	Casio B-855T PLUS		1				£8.00										£9.99	£12.99	£8.99	£9.99							
	Pritt	Pritt 2gkg stick		1	£3.00	£2.00	£1.50	£2.00	£2.50			£3.45	£3.00		£2.40	£3.40		£2.99	£1.00	£1.50		£1.00						
	Pritt	Pritt 8kgkg stick		1					£2.00												£1.80							
Accessories	Blu Tack	Blu Tack original		1	£0.95			£0.75										£2.49	£2.99	£1.99	£1.00	£0.89	£1.00	£1.00		£0.99		
	Blu Tack	Blu Tack economy		1		£1.00		£0.75										£2.99	£2.29				£1.00					
	Hella Oelford	Hella Oelford mats set in tin		1	£1.50		£1.50	£2.50	£3.00									£2.19	£2.99		£1.99					£2.45		
	Selfotape	Selfotape Original Gold		1	£1.50		£1.00	£1.00	£1.50	£1.00		£2.15	£2.00	£2.60	£3.99	£2.79	£1.49	£1.00							£2.29			
	Paper	HP Everyday Paper 70gsm	white	500 sheets		£4.00	£4.00	£3.00	£2.00																			
	Paper	Xerox Xerience copier paper	white	500 sheets								£4.12																
	Notebooks	Pukka Pad A5 jetta		200 sheets/ Tesco product 160 sheets				£2.25	£2.25		£3.50							£3.99	£5.99	£3.99	£1.99							
	Notebooks	Pukka Pad A5 project book		200 sheets	£3.00		£4.00	£3.00										£4.99	£7.00	£3.99	£2.99							
	Notebooks	Pukka Pad A4 jetta		200 sheets/ Tesco product 160 sheets	£2.50		£4.00	£3.00	£2.00									£5.99	£7.99	£4.99	£2.99							
	Notebooks	Pukka Pad A4 project book		200 sheets	£2.50		£5.00	£3.75	£4.00									£6.99	£9.99	£4.99	£4.99							
Notebooks	Oxford Campus A5 notebook		140 pages				£2.99	£3.50												£2.99					£1.38			
Notebooks	Oxford Campus A4 notebook		200 pages				£3.74	£2.00												£4.99								
Notebooks	Oxford Campus A4 Project book		200 pages				£4.49	£3.50												£5.98								
Notebooks	Oxford Campus refill pad		140 pages				£2.99	£2.00												£2.49								