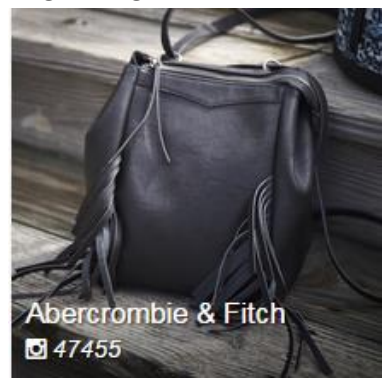


spotlight on: BACK TO SCHOOL

The buzz started around The Row's \$40,000 backpack in 2011 and the trend is still going strong!

Students are shifting away from the messenger bag (search volume -23% to LY), in favor for the increasingly popular **backpack** (search volume +15% to LY), no longer just a school staple but a fashion must-have!

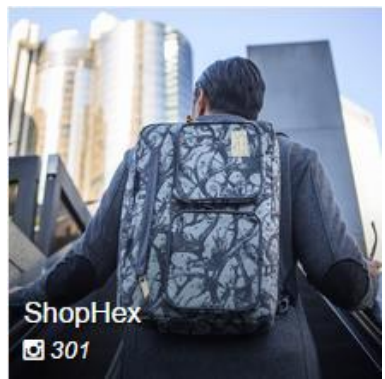
With double digit search volume growth, these **growing** micro trends have emerged within the backpack trend:
Laptop/Tech, Mini, Fringe, Leather



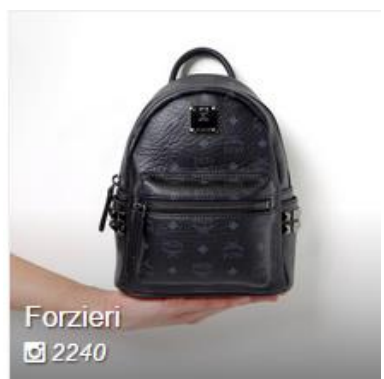
Fringe
Search +27% to LY



Leather
Search +27% to LY

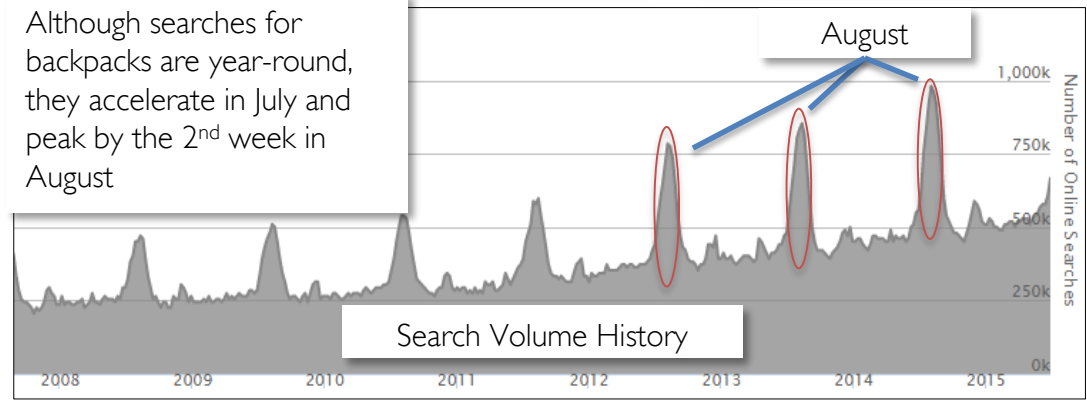


Laptop/Tech
Search +23% to LY



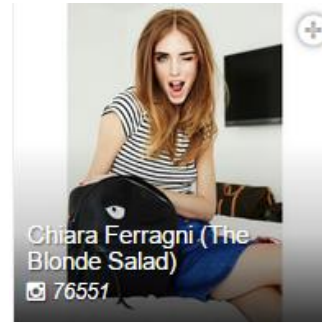
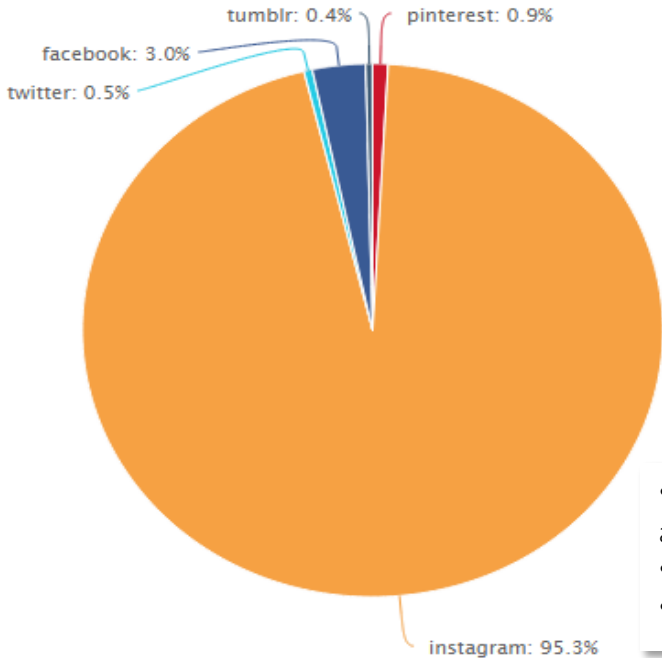
Mini
Search +22% to LY

Although searches for backpacks are year-round, they accelerate in July and peak by the 2nd week in August

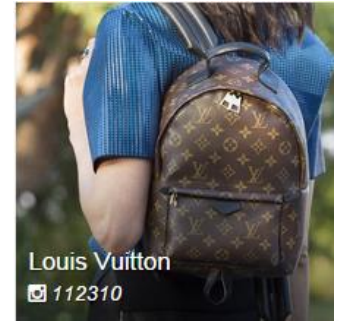


1. WHO is buzzing?!

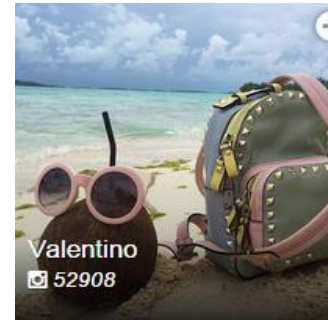
Since backpacks have evolved into a huge fashion trend, we are seeing a shift in the content and influencers driving the social buzz. Currently, the **Fashion Community** is driving the highest social engagement for backpacks, from **Fashion Bloggers** to **Luxury Labels**. Last year, retailers such as Topshop, Urban Outfitters and PacSun that typically target Millennials, drove the most social actions.



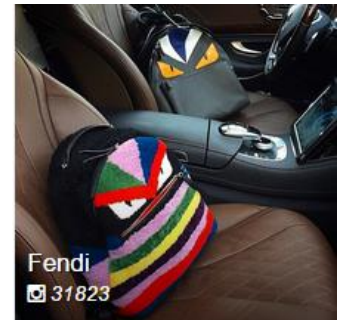
Chiara Ferragni
(The Blonde Salad)



Louis Vuitton



Valentino



Fendi

- 95% of post engagement for backpacks in the last 90 days was driven by Instagram with an average of over 4950 social actions per post vs. 400 per Facebook post
- TY 95% of post engagement for backpacks was driven by Instagram vs. 84% LY
- Total social actions per post for backpacks increased by 111% to LY

Designer brands with the largest market penetration in backpacks:



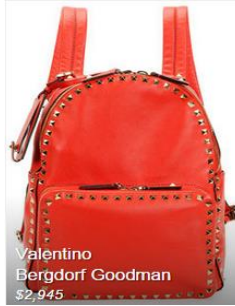
Stella McCartney



Moschino



Proenza Schouler



Valentino



The Row

The designer backpack trend is directly influencing brands across the backpack market, even the traditional backpack brands. We can see the influence within aesthetic and design elements: leather, fringe, mini, minimal/clean lines, studs, drawstrings, flap closures, and bucket bag influences.

2. Market Opportunity

Backpacks aren't just for school or the outdoors anymore! Over 40% of backpacks in the market are from designer and contemporary brands.

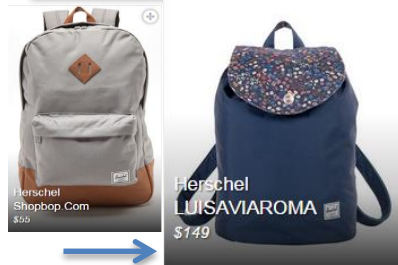
Backpacks in the Market:

- 13% carried by traditional brands (Jansport, Herschel Supply Co., Dakine)
- 17% carried by designer brands
- 25% carried by contemporary brands

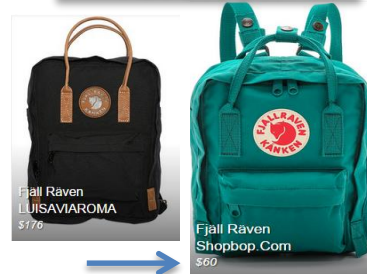
JanSport Minimal/Clean Lines



Herschel Supply Co. Drawstring/Flap Closure



Fjällräven Mini Backpack



Social Actions Increase to LY:

Herschel Backpack	+39%
Vans Backpack	+37%
JanSport Backpack	+24%
Ogio Backpack	+16%
Dakine Backpack	+7%

These are the highest searched terms associated with backpack brands



Call to Action

Merchandising & Marketing Departments Next Steps:

- Ensure that promotional activity and deliveries are focused around peak time- July through the beginning of August as this is when search volume is highest for “Back to School”
- Consider featuring fashion forward backpacks on landing pages, as well as in navigation points to increase click through & conversion
- Focus marketing efforts on Instagram where the highest number of social actions are taking place for these trends
- Consider increasing inventory within these backpack micro trends to maximize sales and decrease inventory in messenger bags to reduce liability

