

BBDO KNOWS

CONSUMER

BACK TO SCHOOL, BACK TO WORK

2021

What you need to know – Executive summary

This year, back to school represents much more than an annual retail occasion or the end of the summer holidays, it marks the return to a much missed aspect of pre-pandemic life. After 18 months of schools being intermittently closed across the world, children go back into the classroom.

And this year back to school coincides with back to work. Children and adults are sharing the experience of a physical return and both are having to psychologically adjust to change, yet again. Rituals and routines are upended again and excitement is mixed with apprehension.

This year, back to school and back to work represents an opportunity for brands to help people navigate new and find new rituals.

TIP: You can read our papers largely through the main text slides and just the slide headings. The material provided on the slides is evidence and texture for the point made on the slide heading.

NOTE: We always try to use global data where possible, we would ask you to compare your local market data, if you struggle to locate the same data point for your market, please reach out to the Knows team.

This year, back to school is not simply an annual marker in the diary or a retail occasion -

it signals a return to a much missed aspect of pre-pandemic life... and this year, for perhaps the first time ever, we are also seeing a return to work, or at least a return to the office.

Restrictions implemented to stop the disease spreading



The internet is awash with the pains of home-schooling and working from home



As vaccination roll outs continue, and restrictions and lockdowns lift, the world is slowly re-opening...

But the last eighteen months have had a significant impact on students and workers -

The impact of lost schooling is concerning – and discriminating

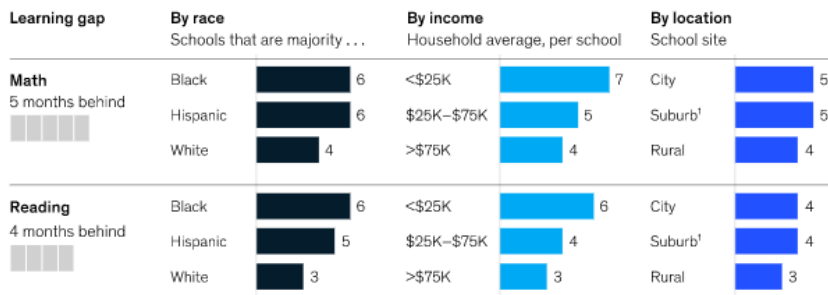
Predictions about the long-term effect of school closures on students are at best sobering, and at worst, represent a tragedy for future generations; today's students may earn \$49,000 to \$61,000 less over their lifetime. The crisis also widened inequality gaps:

A year into the COVID-19 pandemic, children across the world have **lost an average of 74 days of education** each due to school closures and a lack of access to remote learning, Save the Children said today – more than a third of the standard global 190-day school year. In total, an estimated 112 billion days of education[i] have been lost altogether, **with the world's poorest children disproportionately affected.**"

– Save the children, March 2021, [link](#)

By the end of the 2020–21 school year, students were on average five months behind in math and four months behind in reading.

Cumulative months of unfinished learning due to the pandemic by type of school, grades 1 through 6



¹Town or suburb.
Source: Curriculum Associates I-Ready assessment data

Around flexibility, rest and positive impact

Eighteen months of working from home (part-time or full-time) have left many office workers with heightened expectations of their colleagues, employees and workplaces. Most significantly, workers are prioritising their newfound flexibility going forwards:

38%

of people who work remotely say it's easier to balance work with family responsibilities & 19% have more flexibility to choose when they put in their hours ([LINK](#))

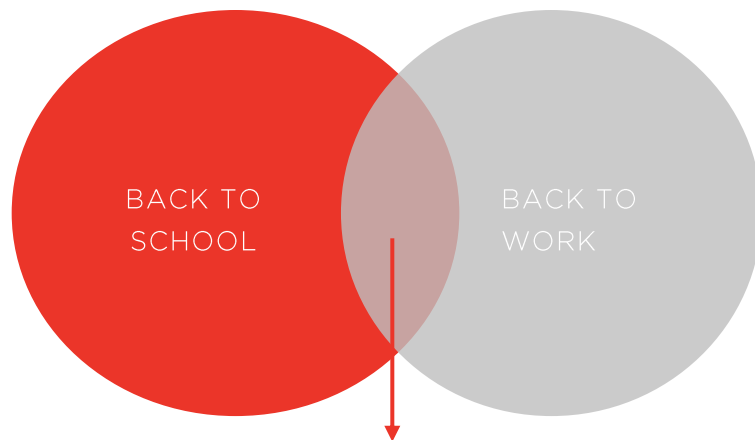
FLEXIBILITY

45%

of Americans feel less mentally healthy while working from home - 97% are trying to prioritize vacation days to 'recharge' ([LINK](#))

REST & RECHARGE

Children and adults navigating change



After an extended period of uncertainty, changing circumstances and being at home, adults and children alike share the experience of returning to new physical environments

As we navigate a return to school and work, we
navigate great change.

Routines and rituals are upended... again

As we go back to school & work we evaluate the cost of what was lost in the form of missed classes and skills...

and **inevitably we have to relearn certain etiquette and behaviours.**

Back to school in 2021 remains an opportunity for a new start, and this year workers in certain regions can share this sense of new.

The **role and opportunity for brands is to participate in the return by helping reassure in the face of change and facilitate or flex in the context of new rituals.**

BACK-TO-SCHOOL

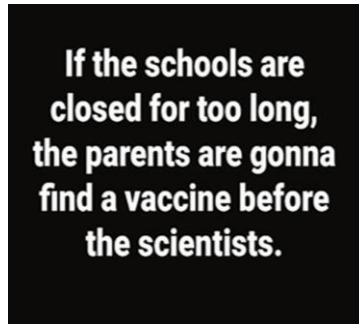
(if needed) # The return to the classroom



“ Although **the 2020-21 academic year ended on a high note**—with rising vaccination rates, outdoor in-person graduations, and access to at least some in-person learning for 98 percent of students—it was as a whole perhaps one of **the most challenging for educators and students in our nation’s history(US).**”

- McKinsey, July 2021

Parents documented the horrors and humour of home schooling online



Quarantine Schedule
@psychedmommy

Some moms:	Other moms:
7am Breakfast	Schedules
8am Free play	Stress
9am Chores	Me
10am Snack	Out
11am Reading	We
12pm Lunch	Will
1pm Nap/Quiet Time	Survive
3pm Snack	One
4pm Outdoor activity	Minute
5pm Craft	At
6pm Dinner	A
	Time



Education lost will have long term costs

As we navigate a return to the classroom, parents are concerned at what has been lost in previous months, and what the long term impact might be.

35%

of parents are very or extremely concerned about their children's mental health in the aftermath of them missing large periods of school over the last 18 months.

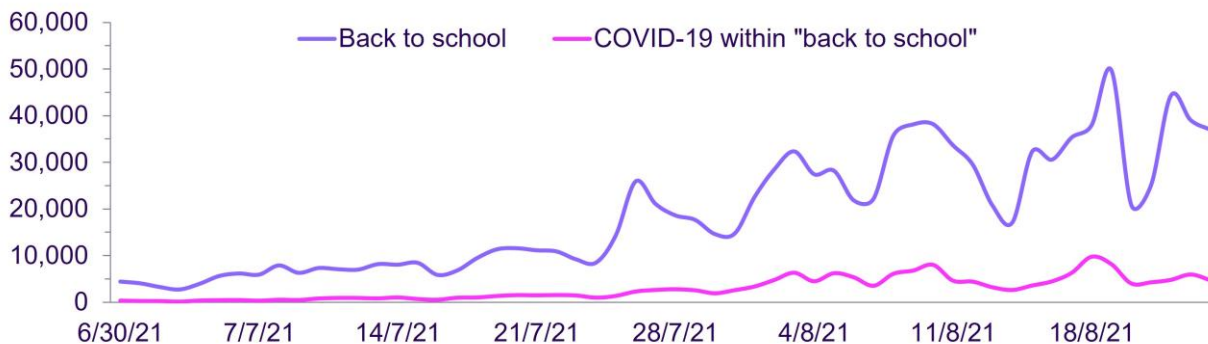
SCHOOL BOOSTS
MENTAL HEALTH

“reflecting substantially lower covid-19 cases and the ongoing vaccine rollout, the majority of survey respondents say their children will be returning either to a full-time in-person or hybrid learning model. **56% expect their children to return to the classroom.**”

PARENTS EXPECT
THE RETURN

Back to school more challenging than ever

The subject of going back to school (and returning to the office) is on many consumers' minds, globally. As seen in the chart below, conversation started to grow on Twitter from the beginning of July, but the final week of the month is when conversation really increased. And within this conversation, COVID-19 is the biggest theme – suggesting a nervous mood as schools reopen. Tweets express fears of children catching COVID at school and becoming unwell, bemoan a lack of clear guidance from governments, and explore the idea of kids being given vaccines at school without parental consent.



After having kids at home for over a year

Excitement meets worry as European kids head back to school

By JILL LAWLESS September 3, 2021

● 49%

“I’m anxious about sending my child or children back to school”

4 Ways Parents Can Calm Their Back-to-School Fears

A psychiatrist offers these tools to her patients who worry that Delta will disrupt the school year.



Kicia Gabriela

By Pooja Lalshmin, M.D.

Published Aug. 20, 2021 Updated Sept. 3, 2021

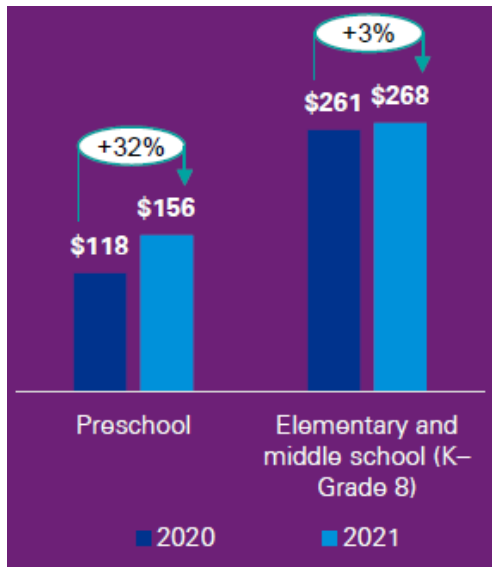
As a psychiatrist specializing in women's mental health, I have spent the past few months celebrating alongside my patients as they planned family reunions and sent kids off to summer camp. But with the arrival of the Delta variant, old questions and a familiar despair have begun to resurface in our sessions: Patients find themselves yo-yoing between “The kids will be all right” and “What if they’re not?”

With vaccination rates still low in pockets of the country, a [rise](#) in pediatric Covid-19 cases, and [battles being waged](#) in schools about mask mandates, parents are understandably disappointed and fearful about sending their children back to school.

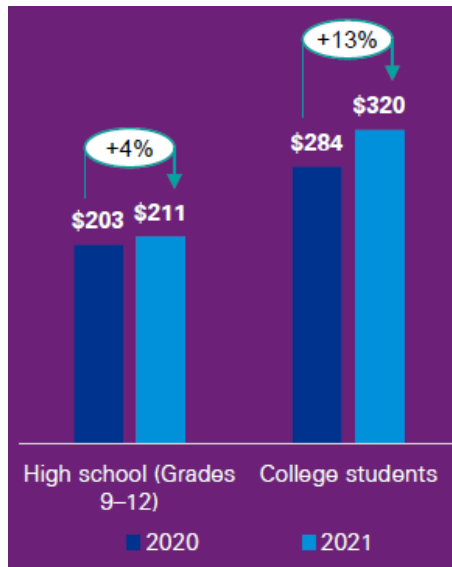
Because costs are rising



Predicted increase in back to school spend YoY. Spend on supplies per pupil:



BACK TO SCHOOL COSTS RISING

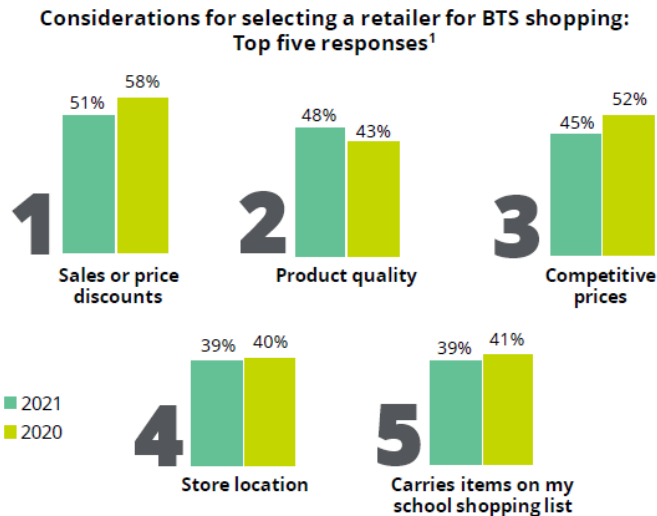


In Australia, back to school takes place in January, post Christmas - According to BIG W's Annual Back To School Report, which was conducted by YouGov, Australian families were spending on average \$592 per child on back to school costs for 2021, an increase of 10 percent on 2020, a figure which has increased again after a [rise of 13 percent](#) from 2019.

The report also revealed that technology played a large role in the increase this year with parents spending an average of \$284 on tech.

[LINK](#)

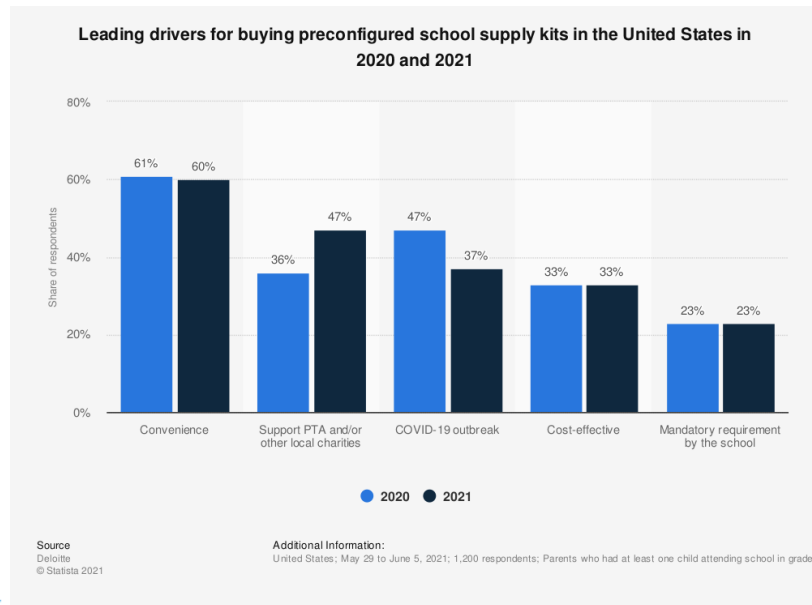
Consistent with last year's priorities



Question: What are the most important considerations when selecting a retailer for BTS shopping? – Multi-response question; hence, the total may not equal 100% (N=1,200)

PRICE A DRIVER:

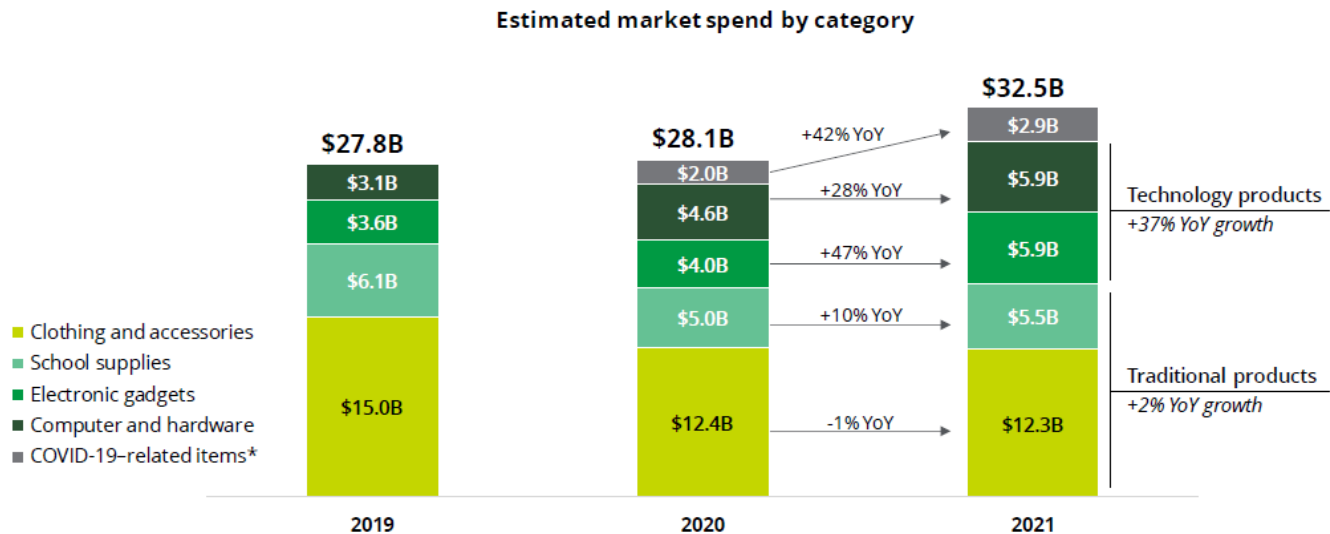
Price remains the top consideration in retailer choice for back to school spend



CONVENIENCE/CURATION A DRIVER:

More than usual parents are buying preconfigured school kits for convenience

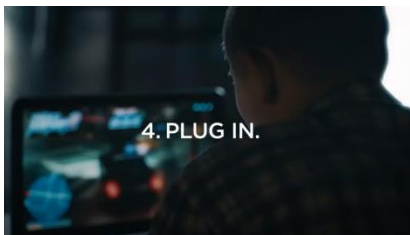
Spend increases on electronic gadgets, computers & hardware



SPEND SHIFTS TO TECH suggesting technology related rituals developed during covid will remain prevalent and a key part of the learning experience

While parents undertake the back-to-school shop...

brands can consider their role during this significant and highly emotional occasion, and think about the **support, reassurance and convenience they can offer and how to meaningfully contribute to, or introduce, new rituals.**

Best of back to school ads**SANDY HOOK
PROMISE**

Non-profit Sandy Hook Promise has created a campaign called 'The kids are not alright', which has three key iterations: How to overload a circuit; How to make a homemade bomb; and How to perform a disappearing act. Each one illustrates the effects of the pressure cooker children have been living in during covid – with more screen time, less human contact and more opportunity for stress, anxiety and isolation.

[LINK](#) & [LINK](#) & [LINK](#)

**SUPRA - AN OPEN
LETTER**

Stationary company Supra pens has made an ad with animation students, which shows what kids have missed most about school. The spot ends in a plea to people to act responsibly in order to end restrictions. "The absence of a normal childhood, missing face-to-face interaction with teachers and fellow students is impacting their studies and hampering their psychological growth."

[LINK](#)

TAKEAWAYS

- The impact and cost of missed education is still being counted. Far reaching consequences are inevitable.
- Brands need to raise awareness around wellbeing and mental health, and help support and reassure parents, children and teachers.

Best of back to school ads



VERY - THE THRONE

Very acknowledge how big this return to school is and playfully acknowledge the rituals and codes of the journey to school. Very ensure your kids are prepared for everything

[LINK](#)



SPORTS DIRECT - SCHOOL STARTS HERE

This year's Sports Direct ad celebrates the return to school sport – showing kids playing a number of different games while re-connecting around the pitch/court. TikTok stars Ollie Ball and Jacob Pasquill feature, providing occasional commentary.

[LINK](#)

TAKEAWAYS

- In amongst the apprehension, there is also excitement. There is no substitute to the physical classroom. Playtimes, time with friends, sports return with force.
- Brands can acknowledge the excitement around back to school – and underline what we've been missing.

Best of back to school ads**STONYFIELD YOGHURT
- YOU GOT THIS**

Parents searching for advice on back-to-school stress will uniformly find this tip: Increase your self-care. Stonyfield yogurt have therefore created the Breakbox Collection, 3 lunchbox-style packages that supply "what parents really need to get through their day." With names like "You Got This," the boxes are geared to adults who are readjusting their kids to in-person learning while juggling their own myriad job and home duties and keeping an eye on the latest Covid-19 surges.

[LINK](#)**KOHL'S - HAVE A
GREAT FIRST DAY**

An amusing spot from Kohls acknowledges that a child's first day back in the classroom, is also a parents first day of freedom. A child wishes his Dad a great first day too and he heads off.

[LINK](#)**TAKEAWAYS**

- Back to school is always a big event for parents, but this year there is a greater sense of occasion and apprehension. First day nerves will play out for children and parents and carers alike.
- Brands can call out the good and the bad, the hopes and the fears...

Best of back to school ads



TARGET - YOUR FIRST STOP

Target illustrate how the return to school will see lots of firsts. First day, first expression, first gear, first bite, first look. Target illustrate these new rituals and their part within them whilst also dialling up price. "With lower prices and great deals, make Target your first stop"

[LINK](#)



MACY'S - DUST YOURSELF OFF

American retailer Macy's back-to-school sport is a celebration of everything that kids have missed being apart from each other – selfies sports, sleepovers – and encourages kids to find excitement in putting on new clothes to mark the start of a new year.

[LINK](#)

TAKEAWAYS

- Back to school truths and rituals will play the most important role in helping the return to class.
- This year, self expression will play out in old and new school kit. Brands that understand and can participate in back to rituals will be appreciated and applauded.

—

BACK TO WORK

(if needed) # The return to the office



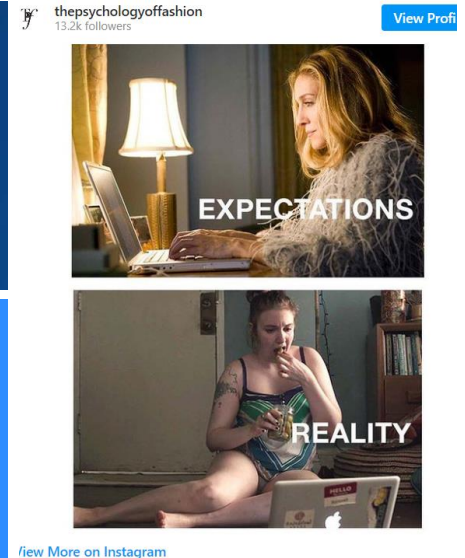
“ The **surge in search terms related to back-to-work purchases** suggests that the trend could rival back-to-school shopping as the academic year approaches. Searches for makeup, office attire, on-the-go snacks and pet cameras have skyrocketed, some by several thousand percent compared to last year at this time.”

- *AdWeek*

This year, it's not just the kids who are going back.

Across the world, adults are returning to the office.
But 18 months of change have led to a shift in
employee priorities and expectations...

Requiring them to adapt to remote ways of working



+67% growth in user base January-March 2020. [Reuters](#)

Which brings new challenges

MANAGING CROWDS AGAIN



Rush-hour traffic in London touched on pre-pandemic levels this morning (see graphs, top right; traffic on the A102 into London, left; London Bridge, main; and a rail commuter, inset) as hundreds of thousands of staff headed back to their desks after bosses called time on working from home. TomTom traffic data put 9am congestion in London at 61% - compared to 63% in 2019. Birmingham and Liverpool were also close to the 2019 average - but other cities, including Leeds, Newcastle, Manchester and Sheffield were still well below. After 18 months of employees working at home, some of the UK's biggest employers have told staff they are now expected to turn up for work - even if it is just for one day a week. But there was dismay as civil service chiefs and the Bank of England again delayed plans to require their staff to return to the workplace. The drive to bring Britain back to the office came amid growing frustration among ministers that the Civil Service has failed to take the lead. Official 'work from home' Whitehall guidance was removed on July 19 and businesses have been told that the Government 'expects and recommends a gradual return over the summer'. But insiders said Whitehall had only seen a slight increase in staff back at their desks, with the numbers in the office still 'pretty low'.

LinkedIn, Daily Mail

NAVIGATING OFFICE SMALL TALK

You've asked them if they did anything nice at the weekend and made a general comment about the weather (hot, isn't it?)... now what?

If the return to the office has brought with it intense awkwardness and a struggle to chat, you're certainly not alone.

Months of working from home and social distancing has made many of us forget how to do the basics of office interaction, from speaking up in meetings to the oh-so-tricky by-the-kettle banter.

New research from LinkedIn has found that 84% of young professionals feel 'out of practice' when it comes to office life, and 57% of those asked to return to the workplace feel their ability to make conversation has taken a nosedive.



How to sort out your office small talk skills if you're feeling out of practice

metro.co.uk • 5 min read

TO COME IN OR NOT TO COME IN



Is Thursday the new black?

By Jessica Hartogs, Editor at LinkedIn News

Updated 1 day ago

Which day is the best day to come into the office on a hybrid schedule may be the new watercooler topic of conversation. Thursdays could be the answer. Tuesdays, Wednesdays and Thursdays seem to be the most popular days to come in for face time with your boss, or you could simply "follow this basic rule: 'Your boss's schedule is your schedule,'" Wharton School professor Peter Cappelli tells [The Wall Street Journal](#).

Will you be working a hybrid schedule? Which days do you think are best for face time? Tell us in the comments below.

About how they will return – such as how much time will be spend in the office

EMPLOYERS

Globally, more than 75% of C-suite executives expect the typical “core” employee to be **back in the office three or more days a week.**

**EMPLOYEES**

Globally, more than 50% want to **work remotely at least three days per week.** Nearly 75% would like to work from home for two or more days per week.

Just as we navigate change and uncertainty in going back to school, the same can be said of back to work.

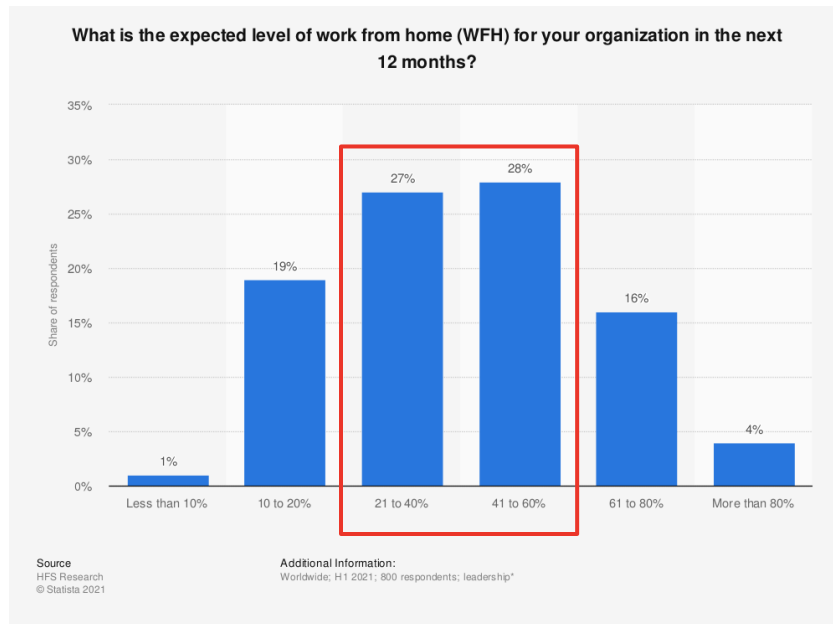
There is no one size fits all approach.

The majority will work from home and the office

39%

Globally are working from home at least sometimes, versus 24% before the pandemic.

HYBRID



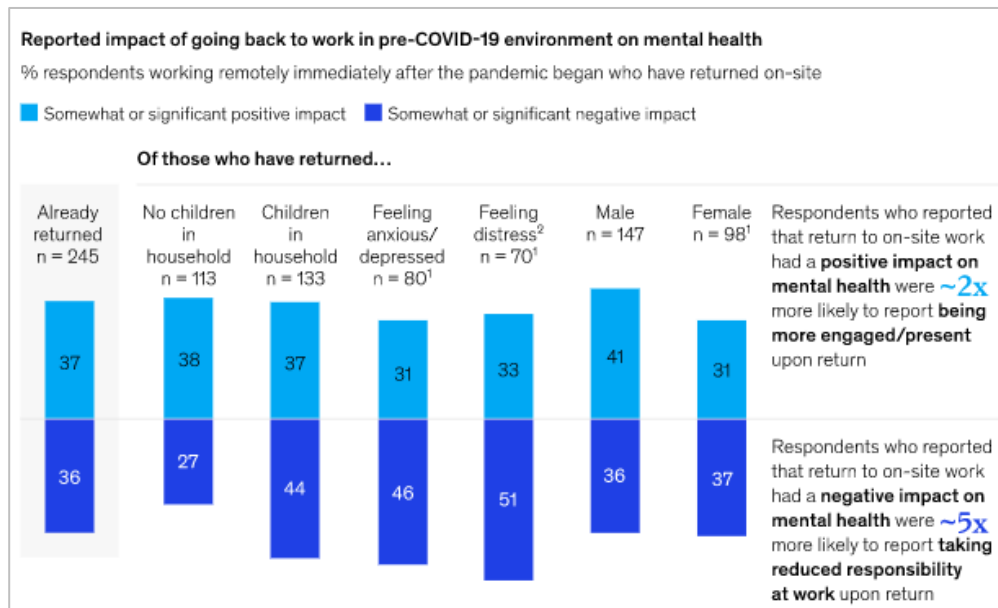
68%

of businesses are implementing a hybrid model but their biggest concerns are around hybrid models are maintaining culture (32%) and maintaining high performance (26%).

HYBRID IMPACT

NOW - WE WILL CONTINUE TO HAVE MIXED FEELINGS

For example, parents are more likely to anticipate a negative impact of return



49%

anticipate going back will have somewhat/significant negative impact.

44%

with children reported negative mental health impact, vs. 27% of those with no children in the home.

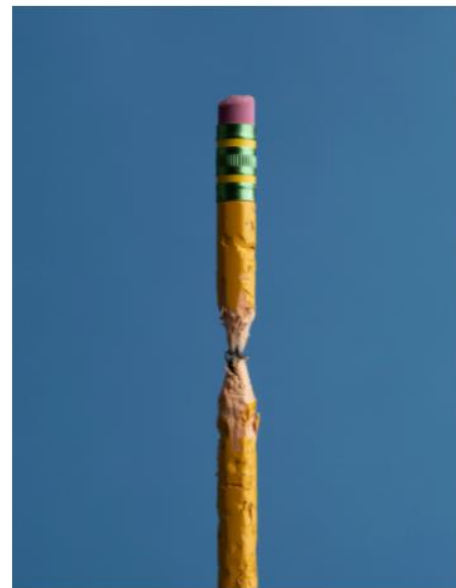
As a result of the last 18 months

● 9 in 10

Globally want flexibility where and when they work

Feeling Anxious About Returning to the Office? Here's What You Can Do.

Experts offer tools for re-entering the world of commutes and co-workers.



Although travel, technology and safety are top of the list (global)



67% want to **travel** for business moderately/extensively post-pandemic (vs. 49% in 2020)



64% want better **technology** in the office (e.g. faster internet and videoconferencing)



61% want their company to make **vaccination** a pre-requisite for working from the office



54% would choose **flexibility** in *when* they work (& 40% where they work) given the choice



48% want companies to upgrade at-home **hardware** (e.g. extra monitors and headsets)



48% say their organisational **culture** has improved during the pandemic

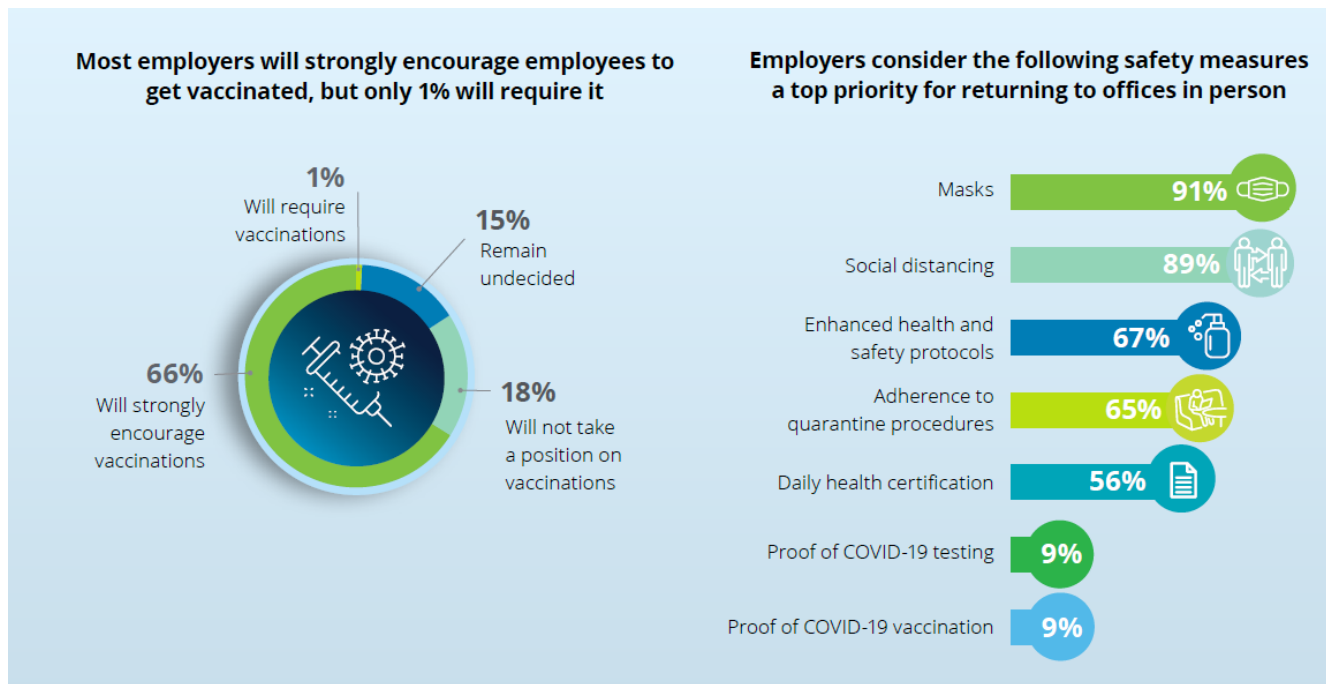


47% would like **re-imbursement** for high-speed internet/phone expenses.



33% want a **shorter working week**

In the aftermath of the pandemic



For the future of employees' happiness at work

Millennials and Gen Z report high levels of stress – particularly with regard to their personal finances and families' safety. They have taken time off to manage their mental health and don't believe employees have done enough to support them. As they become the majority of the workforce, businesses must take note.

40%

Of millennials and Gen Zs feel their employees have done a poor job of supporting their mental well-being during the pandemic.

LACK OF SUPPORT

31%

Of millennials and 35% of Gen Z have taken time off due to stress and anxiety caused by the pandemic.

IMPACTS WORKING
ABILITY

41%

Of millennials and 46% of Gen Z say they are stressed all or most of the time.

ONGOING STRESS

NOW – OTHER SECTORS RELY ON OUR RETURN TO THE OFFICE

Out of home spend is vast when we are in the office

The rise and fall of Pret a Manger

Pret cashed in as office workers spent thousands on coffees, baguettes and fruit pots. As shops stand empty, what comes next might be worse



PRET A MANGER

“

I used to spend around £5 a day on coffees, lunches, drinks and so on, plus the odd drink after work – around £100 a month.

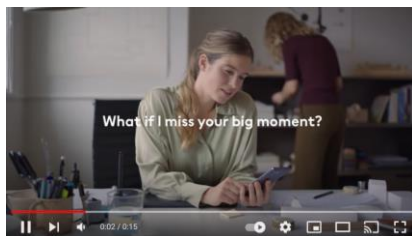
I'm not quite sure how I made it work before!

”

As we contemplate back to work after 18 months, we are seeking reassurance, flexibility and also to see our values reflected back at us.

Yet again, **brands have a meaningful role to play in helping consumers navigate change, find new rituals and routines that comfort and reassure.**

Going back to the office means leaving what we love behind



H & M - WHAT IF I MISS ...

H&M acknowledge the challenge of leaving our children after such a long period working from home. A series of ads ask "what if it's hard to say goodbye?" "What if I miss your big moments?" and attempt to reassure parents that going to work will be ok

[LINK](#)



MEDVET - BACK TO ...

Medvet viewed back to work and school from the pet perspective, offering advice to pet owners as they contemplate leaving their new animals and return to the office.

[LINK](#)

TAKEAWAYS

- Working from home had benefits in the form of our home comforts and more time spent with loved ones.
- Brands can acknowledge the challenge of leaving those we love again.

Best of back to work initiatives – BBDO Network examples**SERVICE NOW**

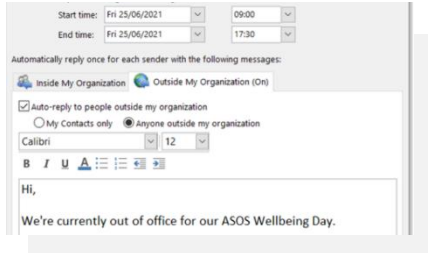
BBDO San Francisco's most recent ad for Service Now's, Let's Work Flow It, is a fantastical Charlie and the Chocolate Factory parody. The spot shows how the company's ways of working programs has managed to improve even the most chaotic places of work – so why not yours?

[LINK](#)**SNICKERS**

Snickers stays true to its master brand positioning with a new ad for Snickers ice cream by BBDO New York. Directed at office worker-holiday makers, the ad makes fun of the extent to which people struggle to switch off on holiday. It acknowledges the fact that for many of us home and work have become inextricably linked.

[LINK](#)**TAKEAWAYS**

- During the pandemic office work has become more fraught for many – with more digital communication, altered work streams and shifting expectations.
- Brands can consider how they can ease the transition back, and help participate in old or create new rituals.

Best of back to work initiatives**ASOS - DAY OFF**

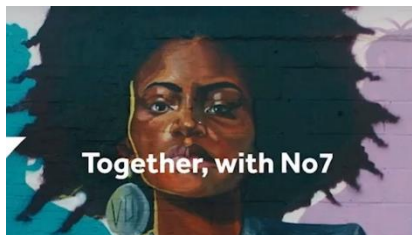
ASOS gave its employees a Friday off of work, which it dubbed Wellbeing Day, and explained on Twitter that it was "a thank you for their hard work & dedication over the past year". They then published a series of photos of what employees did with the time off, which included activities ranging "from getting back in touch with nature to exploring their creative sides".

[LINK](#)**MOODBEAM - WEARABLES**

Moonbeam wearable technology tracks emotions. The watch has two buttons: "you press the yellow one if you are feeling happy, and the blue one if you are sad. Aimed at companies who wish to monitor the wellbeing of staff who are working from home... employees are encouraged to wear the wristband and press the relevant button as they see fit. Managers can then view an online dashboard to see how workers are feeling and coping."

[LINK](#)**TAKEAWAYS**

- During covid, stress and anxiety sky-rocketed, especially among Millennials and Gen Z - who were worried about their jobs, health, families, and the environment.
- Brands can help encourage employees to look after themselves, and occasionally pause or reset.

Best of back to work initiatives**NO7 - UNSTOPPABLE TOGETHER**

No7's new ad 'Unstoppable Together' is in support of working women who have given up their jobs and left the workforce to be caregivers during the pandemic. The campaign is raising awareness for the "SHEcession", a term coined to reflect women's disproportionate job losses during the pandemic.

[LINK](#)**MCDONALD'S**

"McDonald's announced that executive vice presidents' compensation will be measured not only on financial performance but also on their ability to "champion our core values, improve representation within leadership roles for both women and historically underrepresented groups, and create a strong culture of inclusion" ... to improve representation within leadership roles."

[LINK](#)**TAKEAWAYS**

- The growing expectation for businesses to make responsible and ethical decisions is increasing among young generations – especially in regard to sustainability and equality.
- Brands need to make it possible for more people to navigate the workplace with confidence and success.

This year back to school and back to work coincide. Concern, caution, fear, excitement, apprehension and hope are all prevalent emotions.

Brands have a meaningful role to play in **helping consumers navigate change, find new rituals and routines that comfort and reassure.**

As we continue to navigate covid, certain occasions take on new meaning, this will remain the case.

Brands will need to continue to try to anticipate shifts and the heightened significance of certain events and ensure they show up and show up with meaning.

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[Brief the team](#)



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