Alison.Ai

CREATIVE INTELLIGENCE · 2026

Back-to-School Starts in July. So Does the CPM Bloodbath.

Shoppers start early and decide fast. By mid-July, the CPMs to reach them are the highest of the year.

The bargain window is early July, while shoppers are still building their lists. From mid-July through late August the auction peaks and CPMs climb 25 to 40% in our data. A field guide to winning the most expensive, most front-loaded season of the summer.

Alison.ai first-party data · 1,400+ campaigns · 3.1B impressions · June–August 2025

Back-to-School 2026 · Creative Intelligence Report

67%
of shoppers have started by early July, forming decisions before they buy (NRF)

+40%
peak-window CPM lift in our campaign data, mid-July to late August (Alison.ai)

8d
median days-to-fatigue for back-to-school creative in saturated feeds (Alison.ai)

EXECUTIVE SUMMARY

The season everyone plans late and pays for.

Back-to-school is no longer an August event. The decision window opens in July, and the calendar has quietly inverted the economics of the whole season.

About two-thirds of back-to-school shoppers have **started by early July** (NRF), pulled forward by Prime-season deal events and early-planning parents. Most purchases still land later, but the decisions form now, and so do the advertisers chasing them. From mid-July through late August the auction is at its most crowded and, in our campaign data, average CPMs rise **25 to 40%**. You pay the year's highest rates to reach a shopper whose shortlist is, in many cases, already taking shape.

In that window, media efficiency is decided almost entirely by creative. Targeting is automated and commoditized; **Nielsen attributes roughly half of advertising's sales effect to the creative itself, and up to 56% for digital**. When every impression costs more, a weak or fatigued creative is not a brand problem. It is a budget leak, paid for at peak rates. This report maps where the spend goes, what wins, and how to be ready before the meter starts running.

METHODOLOGY

What's behind the numbers.

Date range	June 1 to August 31, 2025, benchmarked against full-year 2025 norms.
Sample	1,400+ campaigns · 9,200 unique video creatives · 3.1B impressions.
Platforms	Meta (44%), TikTok (27%), YouTube (18%), Amazon (11%).
Verticals	Apparel & footwear, consumer electronics, school supplies, food & snacks, edtech & learning apps.
Definitions	"Days-to-fatigue" = days until an asset's CTR falls below 75% of its first-72-hour peak, measured on each vertical's dominant platform. The platform "surge/decay %" on page 4 is a different scale: CTR change across day-windows, not a threshold. CPM figures are blended auction costs across the sampled Alison.ai accounts.

Externally sourced figures: back-to-school shopping timing (NRF), creative's share of sales effect (Nielsen / NCS), and UGC-versus-studio engagement (published industry studies). CPM movement, days-to-fatigue, dollar-waste, recovery rates, and all per-vertical and per-platform figures are Alison.ai first-party data and are not independently verifiable against external sources.

FINDING 01 · THE WINDOW

The deciding happens in July. So you have to.

The reflex to launch back-to-school in August is now a full month late. With about two-thirds of shoppers already browsing by early July (NRF) and deal-event shopping pulling decisions earlier still, the brands that wait are bidding for shoppers who are already narrowing their choices. They also bid into the most crowded auction of the summer: as every advertiser piles into the same weeks, **our campaign data shows CPMs climbing 25 to 40% from mid-July through late August**, peaking around the Prime-season-to-early-August stretch.

This creates a brutal asymmetry. Early-July impressions are cheaper and land while choices are still open; the later ones cost more and reach shoppers who have largely decided. Spending the same budget a month late can mean paying a premium to influence a decision that is already mostly made.

> **Case snapshot.** A mid-size apparel brand shifted 45% of its back-to-school budget from August into the first three weeks of July, holding creative spend flat. Blended CPM fell 22% versus the prior year's August-heavy plan, and cost-per-add-to-cart dropped by nearly a third, simply by reaching planners before the auction peaked.

THE MONEY MATH

Four numbers that decide the budget.

56%
of digital ad sales impact comes from the creative itself (Nielsen)

2.3–2.4×
engagement for authentic UGC vs. polished studio ads (industry studies)

$124K
wasted per $1M for each week a refresh is delayed at peak (Alison.ai)

87%
of lost CTR recovered by a 48-hour refresh (Alison.ai)

FINDING 02 · THE COST OF WEAK CREATIVE

When impressions cost more, weak creative costs the most.

A CPM premium multiplies every creative weakness. In a normal month, a fatigued ad wastes cheap impressions. In the back-to-school crush, it wastes the most expensive impressions of the year, and it does so faster. In saturated feeds, novelty decays quicker: back-to-school creative reaches our **fatigue threshold in a median of 8 days** (Alison.ai), against a 10-day full-year norm.

The money math is unforgiving. In our campaign data, delaying a creative refresh by a single week cost roughly **$124K in wasted spend per $1M deployed** during the peak window. Speed pays back two different ways: a light micro-iteration of a tiring asset recovered **+39% CTR** on average, while a full refresh within 48 hours recovered **up to 87% of the loss**, both Alison.ai first-party measures.

> **"In a +40% CPM auction, a fatigued creative isn't a brand problem. It's a budget leak, billed at the year's highest rate."**

FINDING 03 · WHAT ACTUALLY CONVERTS

Students scroll past ads. They stop for people.

The audience that defines this season, students and the parents shopping with them, is the most ad-literate on the internet. The more a creative looks like an ad, the worse it does: polished studio content can see **40 to 60% lower engagement** than authentic, native-feeling UGC (industry studies). Real students, founders to camera, messy desk setups: these outperform polished spots by roughly **2.3 to 2.4×** on engagement and downstream ROAS.

× NOT THIS

A glossy, studio-lit hero spot with a logo sting and a "Back to School Sale" end card. It looks like every other brand's ad, reads as an interruption, and fatigues fast in a crowded feed. By the end of week one the platform has deprioritized it, and every impression after that is bought at peak CPM for almost nothing.

→ Engagement index: 1.0×

✓ DO THIS

A real student or creator, shot on a phone, leading with the single most useful thing in the first 3 seconds. Native, specific, and built in modular variants for fast rotation. When it starts to tire, you swap one element and relaunch the same day, holding CTR through the most expensive weeks of the season.

→ Engagement index: 2.3–2.4×

PLATFORM BREAKDOWN

Where the season is won, channel by channel.

Surge, decay, and refresh cadence differ sharply by platform. Plan the rotation to each one's clock, not a single calendar.

Meta · Reach engine, fastest decay

- **Top hook:** real-student UGC and founder-to-camera; benefit stated in frame within 3 seconds.
- **Winning format:** 9:16 Reels, 9–15s, captions burned in; modular variants over polished one-offs.
- **Must-test:** 3 hooks × 3 opening visuals; let Advantage+ find the audience while you supply the difference.
- **Fatigue timing:** surge +23% (days 1–3), decay −19% (days 8–14). **Refresh weekly.**

> **Case study:** A school-supplies brand rotated five new Reels hooks every Monday through July; CPA held flat while category CPMs rose 28%.

TikTok · Highest surge, needs the most fuel

- **Top hook:** "get ready with me" / haul / first-day-fit formats from creators, not the brand account.
- **Winning format:** 15–21s, trend-aware audio, an unmistakably native first frame.
- **Must-test:** creator-led vs. brand-led cuts of the same offer; the gap is usually large.
- **Fatigue timing:** surge +31% but decay −26% (days 8–14). **Refresh twice weekly.**

> **Case study:** A footwear brand fed TikTok eight creator cuts per week; the twice-weekly cadence sustained the +31% surge into mid-August instead of letting it collapse by week two.

YouTube · Slower burn, longer runway

- **Top hook:** a clear, useful promise in the first 5 seconds before the skip button.
- **Winning format:** Shorts for discovery; 15–30s skippable in-stream for consideration.
- **Must-test:** the opening 5 seconds, the single biggest lever on view-through.
- **Fatigue timing:** surge +15%, decay −11% (days 15–21). **Refresh bi-weekly.**

> **Case study:** An electronics brand A/B-tested only the first five seconds across a dozen Shorts; the winning opener lifted view-through 34% and carried the cohort through August.

Amazon · Conversion-proximate, slowest decay

- **Top hook:** product-forward clarity; benefit and price-value legible without sound.
- **Winning format:** Sponsored Brands video, 15–30s, the product working in the first frame.
- **Must-test:** the lead frame and the value claim placed near the buy decision.
- **Fatigue timing:** flat surge, decay −18% (days 18–28). **Refresh every 3 weeks.**

> **Case study:** A CPG snack brand refreshed its Sponsored Brands video every three weeks; CTR held within 6% of launch through late August while rivals' static ads decayed 18%.

Surge/decay percentages and the case studies on this page are Alison.ai first-party data, on a different scale from the days-to-fatigue thresholds used elsewhere in this report.

THE COST OF DELAY

$124K

wasted per $1M for every week a refresh slips at peak (Alison.ai)

BENCHMARKS

Back-to-school by vertical.

Peak-window CPM pressure, fatigue speed, and the refresh cadence required to hold efficiency, by category. All figures are Alison.ai first-party data.

Vertical	Peak CPM lift	Days-to-fatigue	Recommended refresh
Apparel & footwear	+38%	7 days	Twice weekly
Consumer electronics	+34%	9 days	Weekly
School supplies	+40%	6 days	Twice weekly
Food & snacks	+27%	9 days	Weekly
EdTech & learning apps	+31%	8 days	Weekly

Days-to-fatigue is measured on each vertical's dominant platform, so these medians differ from the per-platform decay windows on the previous page (e.g., YouTube days 15–21, Amazon days 18–28), which mark when decay sets in on that specific channel.

ACTION FRAMEWORK

The four-phase July cadence.

PHASE 1 · LATE JUNE

Pre-flight before you pay

Validate every hero creative for structural readiness before a dollar of peak-window spend. Kill the variants that read as ads now, while impressions are still cheap.

PHASE 2 · EARLY JULY

Launch into the planners

Go live while CPMs are still climbing and shoppers are still listing. Front-load budget here: these impressions are cheaper and more decisive than anything you'll buy in August.

PHASE 3 · MID-JULY TO EARLY AUGUST

Rotate on the platform's clock

Hold the peak with cadence: Meta weekly, TikTok twice weekly, YouTube bi-weekly, Amazon every three weeks. Refresh any fatiguing asset within 48 hours to recover up to 87% of its CTR.

PHASE 4 · MID-TO-LATE AUGUST

Harvest and hand off

Shift to last-minute and "forgotten items" messaging, then prep the college and early-fall follow-on. Bank the winning hooks as next season's starting line.

BACK-TO-SCHOOL · CREATIVE FATIGUE

8d

median days-to-fatigue for back-to-school creative in saturated feeds (Alison.ai)

KEY TAKEAWAYS

Five things to do before mid-July.

1. **Treat July as the season, not the warm-up.**
Most shoppers have started and are deciding before August, even if they buy later. Launch into the planners and front-load budget while early-July impressions are still cheap and still decisive.

2. **Assume a 25–40% CPM tax from mid-July.**
In our campaign data, peak-window CPMs run 25–40% above baseline. The premium is unavoidable; wasting it on weak creative is not.

3. **Make velocity the plan.**
In our data, a one-week refresh delay cost ~$124K per $1M at peak, while a 48-hour refresh recovered up to 87% of lost CTR (Alison.ai). Rotate on each platform's clock.

4. **Look like a person, not an ad.**
Native, specific UGC beat polished studio spots by 2.3–2.4× with the student-and-parent audience. Lead with the benefit in three seconds.

5. **Pre-flight before peak.**
With creative driving up to 56% of digital sales impact (Nielsen), the cheapest efficiency gain is killing the weak variants before they ever run at peak rates.