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Insights

# 2025 Deloitte Back-to-School Survey

Sharpening pencils and budgets

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# Executive summary

Note: All figures are in US$.

Sources: (1) US Chamber of Commerce; (2) Deloitte calculations of BTS spend based on annual consumer survey projections (n = 1,203) and K-12 enrollment figures from the US Census Bureau's current population survey—school enrollment supplement.

In our 18th annual Back-to-School (BTS) Survey, families are sharpening pencils and their budgets. They're approaching their second-largest annual spending event[1] with a note of restraint, given current economic and household financial positions. Despite the uncertainty, parents appear confident they can replace clothing and refill backpacks by leaning on savvy shopping habits they've honed during the past few years of high prices. Expected spending per child ($570) is flat year over year (YoY), as parents expect to focus on just the essentials. Retailers that can appeal to the value-seeking consumer will likely be best positioned to capture part of the $30.9 billion[2] in potential sales (flat YoY) up for grabs.

Our recent ConsumerSignals work indicates that 4 in 10 consumers are showing signs of value seeking: making more cost-conscious choices, deal-driven purchases, and convenience sacrifices. This trend has been on an upward trajectory since the fall of 2024 and the behavior is showing up in our BTS findings as well. Parents surveyed plan to focus BTS purchases around big promotional events in July, spread out expenses over a longer period of time, trade down to more affordable brands and retailers, and even scale back on speedy delivery for more affordable slow shipping.

As younger generations navigate ways to value-seek, they're turning to technology to find the best deals and compare prices. Specifically, they're using social media and artificial intelligence at much higher rates than older parents, potentially reshaping how retailers can entice younger cohorts. For retailers that can appeal to the tech savvy, there could be real rewards, as respondents that plan to use social media in their shopping journey spend 1.8x compared to non-social-media shoppers.

There will be other opportunities for retailers as well. Nine in 10 shoppers surveyed say their child has a must-have BTS item in mind and 62% say they are often influenced by their child to spend more. In addition, over half mentioned they'd be willing to splurge on a first-day-of-school outfit for their child.

So, what does this value-seeking environment mean for the year ahead and the holiday season? Time will tell, but retailers may be wise to use BTS to test promotions and messaging, shore up loyalty programs, and confirm they are reaching younger generations through the proper tech channels.

# Executive perspectives

### Sharpening pencils and budgets

Families are taking a cautious approach to the BTS season as economic expectations and household financial positions dip to the lowest level in the past five years. They're pulling back in all categories except clothing and accessories and plan to spend an average of $570 per child, similar to last year.

### Value seekers get savvy

With economic concerns on their mind, parents are honing their value-seeking skills to keep budgets in check—nearly half plan to spend the most at mass merchant retailers (46%, versus 40% in 2024). They're also planning to jump on mid-July promotions (46%), spread out expenses over a longer period of time (61% of spending will occur by the end of July, versus 66% in 2024), and switch brands if their preferred brand is too expensive (75%, versus 67% in 2024).

### Generation Z rewires shopping norms

Younger generations' tech-first shopping approaches are contributing to new expectations around engagement. Nearly half of millennial and 75% of Gen Z parents surveyed are expecting to use social media in their BTS shopping journey.

# Cheat sheet

## Spending trends

Parents surveyed plan to spend **$570 per child on BTS items** this season (flat YoY). The cautious spending comes as economic expectations and financial situations dip to the lowest level in the past five years.

The **overall BTS market spend holds relatively steady at $30.9 billion** (flat YoY). **Clothing and accessories is up** (+6%)**, while school supplies** (–3% YoY), **tech products (**–8% YoY), and **home, health, and other are down** (–12% YoY).

**Lower-income parents (+10% YoY)** are expecting to spend more because of **higher prices**, while **middle-income (–7% YoY) and higher-income (–9% YoY) parents pull back spending** given economic and financial concerns.

**90% of surveyed parents plan to enroll their children in extracurricular activities** (versus 86% in 2024) and plan to spend $532 (versus $582 in 2024) on fees and equipment.

**62% say their children often influence them to spend more** (same YoY) and **57% can be enticed to splurge on a first-day-of-school outfit**.

## Shopping journey

In 2025, **61% of planned spending is expected to occur by the end of July**, down from 66% in 2024.

**46% plan to shop during the Amazon Prime Day sales** for BTS products, similar to 2024.

Parents plan to shop across **five retail formats on average**, similar to 2024.

**Mass merchants (83%** versus 77% in 2024**) and online retailers (68%** versus 65% in 2024**) are top destinations** for those surveyed, as consumers continue to value-seek.

**32% plan to spend most of their budget in-store** with an **average spend of $501**, while **24% plan to spend mostly online** with an average spend of **$601.**

**41% of BTS shoppers surveyed plan to use social media** in their shopping journey and typically **spend 1.8x** compared to those who do not use social media.

Consumers are becoming more **comfortable using AI than six months ago (40%)** and **33% plan to use it for BTS shopping**, with Gen Z embracing it at an even higher rate (67%).

## Consumer preferences.

Consumers are value-seeking, with **75%** (versus 67% in 2024) **willing to switch to more affordable brands**, while **65%** (versus 62% in 2024) **will shop at more affordable retailers** over preferred ones.

**Private label remains a top way to save money,** with 51% planning to purchase (same as 2024).

**Cashback websites** will be used by **26%** of surveyed parents.

**Consumers (71%) are willing to wait longer for delivery** if it's free or more affordable.

**88% don't feel guilty about** sending their children to school with **pre-owned items** (versus 74% in 2024), but **only 33%** plan to do so.

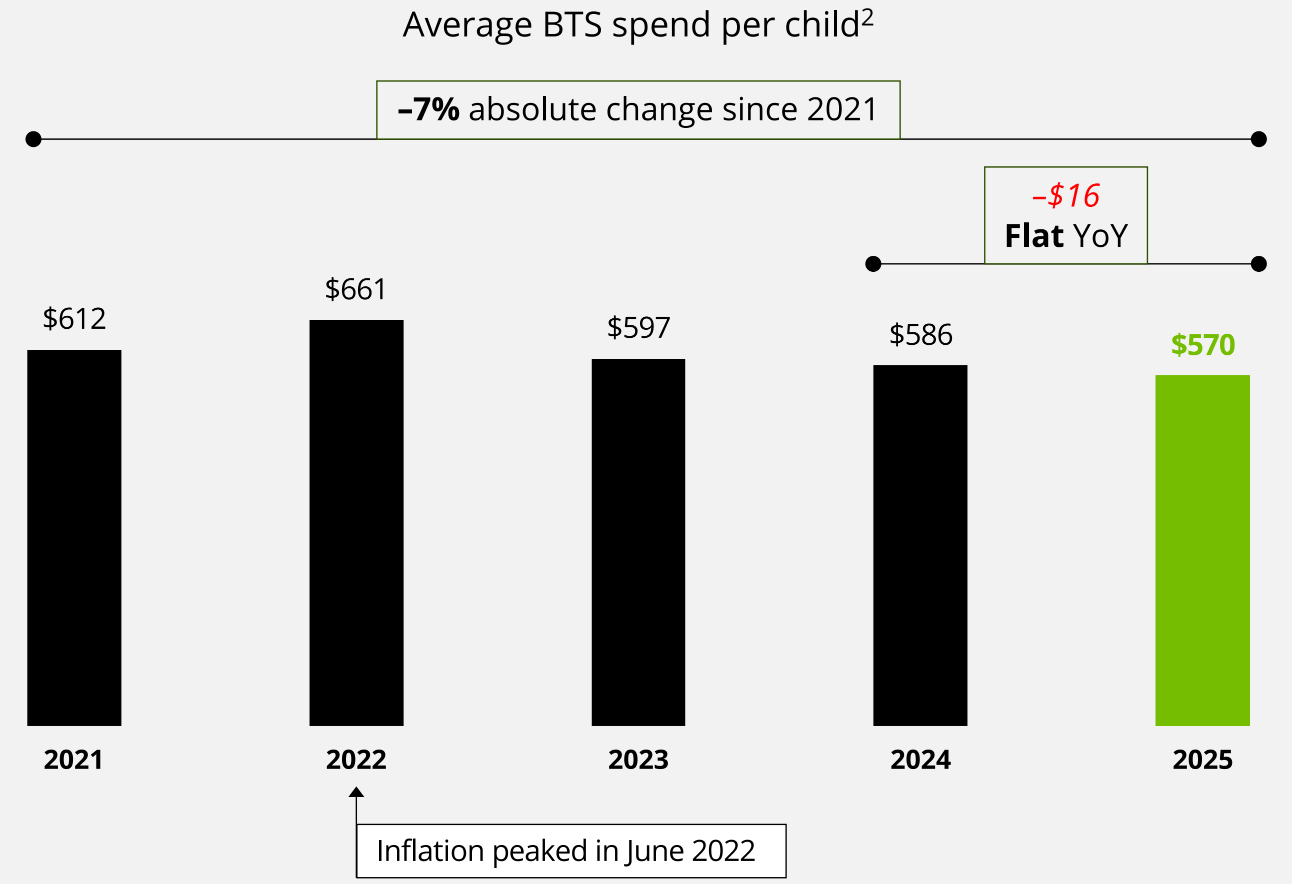
# Spending trends

# Families look to keep BTS budgets tight and spend on par with last year

**Consumer price index, percentage change (May 2021 to May 2025):**[1]

| | |
|---|---|
| Stationery/stationery supplies/gift wrap | **+30%** |
| Boys' apparel | **+14%** |
| Girls' apparel | **+4%** |
| Boys' and girls' footwear | **+4%** |
| Personal computers and peripheral equipment | **–11%** |

**Expected BTS spending is 7% below 2021 levels, despite higher prices in nearly all categories**




Notes: Deloitte calculations on BTS spend based on annual consumer survey projections (n = 1,203).
Sources: (1) Consumer price index, Bureau of Labor Statistics; (2) 2025 Deloitte Back-to-School Survey.

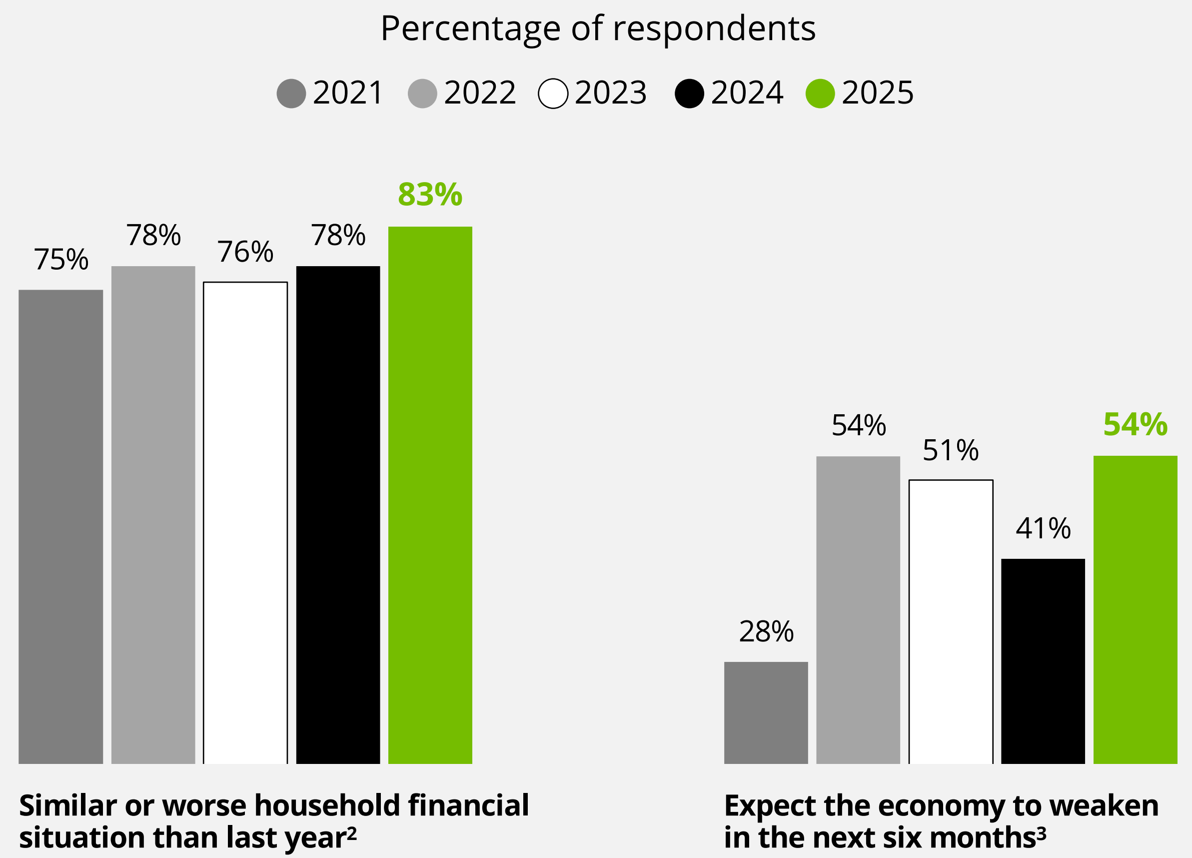
# Economic uncertainty and household financial situations are weighing on parents ...

# 52%

of parents are anxious about the potential for higher prices on BTS items[1]

Note: n = 1,203.
Questions: (1) To what extent do you agree or disagree with the following statements? – % agree/strongly agree; (2) Thinking about your household's assets (home, cash, car, etc.) and your liabilities (credit card bills, mortgage, etc.), would you say your household's financial situation today is ...?; (3) In your opinion, what is your overall outlook for the US economy in the next six months in 2025 compared with today? Would you say it will likely ...?
Source: 2025 Deloitte Back-to-School Survey.

## Household financial conditions and the economic outlook have reached their lowest levels in five years



# ... as parents cut back on other expenses to make room for BTS

# 52%

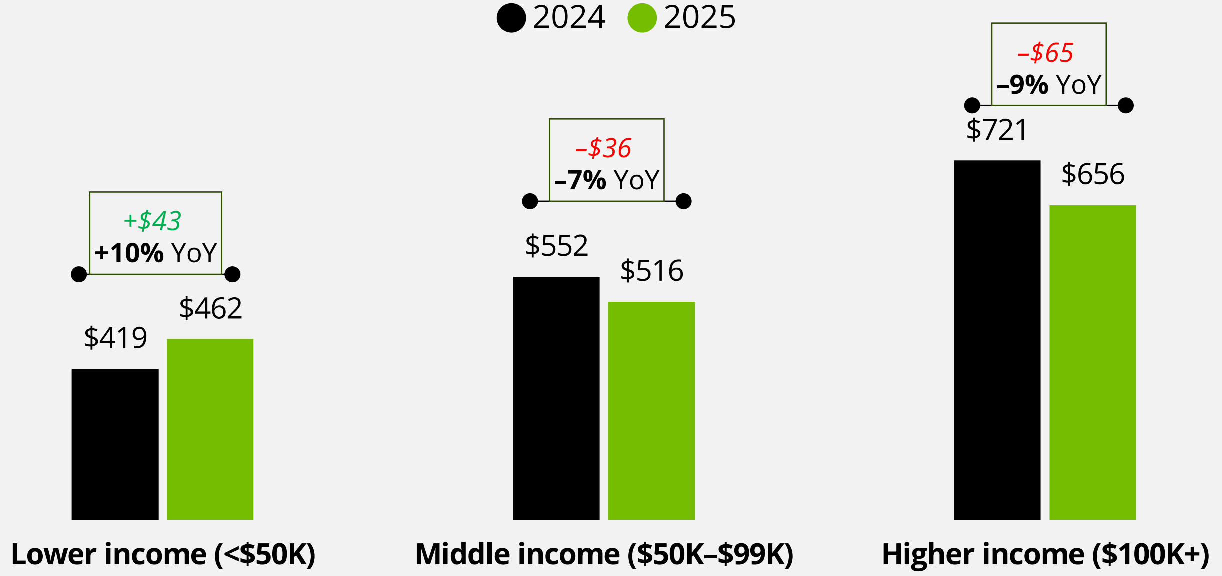
of parents plan to cut back on other areas (eating out, entertainment, etc.) to budget for BTS shopping,[1] *same as 2024*

By household income:

| 2024 | 2025 | |
|---|---|---|
| 64% | 72% | <$50K |
| 57% | 63% | $50K–$99K |
| 39% | 35% | $100K+ |

## With little wiggle room to pull back, lower-income parents expect to have to spend more, while middle- and higher-income groups plan to make cuts

Average BTS spend per child, by household income*




| Top reason for spending less/ more YoY[2] | **68% are spending more** due to higher prices | **51% have less money** to spend this year | **60%** are worried **about the economy** |
|---|---|---|---|

Note: *Deloitte calculations on BTS spend based on annual consumer survey projections.
Questions: (1) To what extent do you agree or disagree with the following statements? – % agree/strongly agree (n = 1,203); (2) Why will you likely spend less/more on back-to-school items this year? (n = 424 spending more, 173 spending less).
Source: 2025 Deloitte Back-to-School Survey.

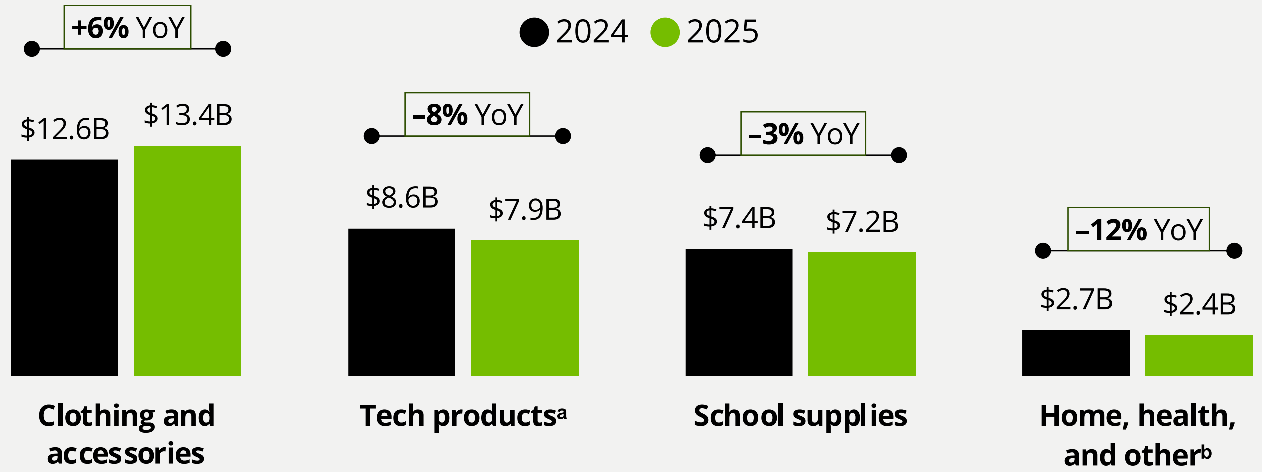
# BTS estimated market spend likely to hold steady

**Spending on clothing and accessories rises, while parents plan to pull back across all other categories**

**$30.9B**

Estimated market spend
**flat YoY** *versus $31.3B in 2024*

Share of total spend on BTS, by category




| | Clothing and accessories 2024 | Clothing and accessories 2025 | Tech products[a] 2024 | Tech products[a] 2025 | School supplies 2024 | School supplies 2025 | Home, health, and other[b] 2024 | Home, health, and other[b] 2025 |
|---|---|---|---|---|---|---|---|---|
| **% shopping the category** | 90% | **93%** | 37% | **29%** | 97% | **98%** | 63% | **63%** |
| **Share of spend** | 40% | **43%** | 27% | **26%** | 24% | **23%** | 9% | **8%** |

Notes: Deloitte calculations on BTS spend based on annual consumer survey projections (n = 1,203) and K-12 enrollment figures from the US Census Bureau’s current population survey—school enrollment supplement; (a) tech products include computers and hardware, electronic gadgets, and digital subscriptions; (b) other includes personal hygiene items like sanitizers, face masks, and furniture for home (desks, chairs, etc.).
Source: 2025 Deloitte Back-to-School Survey.

# Consumers show their value-seeking savviness possibly at the expense of loyalty

## Shoring up loyalty programs and emphasizing value for money could entice price-conscious customers

**75%**
will shift brands if the preferred brand is expensive,[1]
*versus 67% in 2024*

**65%**
will shop at affordable retailers over preferred ones,[1]
*versus 62% in 2024*

**51%**
will shop for private labels over name brands,[1]
*same as 2024*

**71%**
are willing to wait longer for delivery if it means lower/no shipping costs[1]

Demand for standard (2+ days) shipping is up (76% versus 63% in 2024)[2]

**26%**
will buy BTS items using cashback websites[1]

Questions: (1) To what extent do you agree or disagree with the following statements? – % agree/strongly agree (n = 1,203); (2) Are you likely to use any of the following services during the upcoming back-to-school season? (n = 1,038).
Source: 2025 Deloitte Back-to-School Survey.

# Extracurricular activities remain a priority, but parents surveyed look to trim costs

## Parents plan to spend a sizeable amount on extracurricular activities

**90%**

parents plan to enroll their children in extracurricular activities,*
*versus 86% in 2024*

A higher share of lower-income parents (81%, versus 71% in 2024) plan to enroll their children in these activities this year, even though half of them (47%) say it strains their budget.*

**Of these, 70%** plan to spend on retail items for extracurricular activities (sports equipment, art supplies, etc.),[1]
*versus 72% in 2024*

**$532**

average spend on extracurricular activities per child[2]
*versus $582 in 2024, –$50 YoY*

**71%** plan to spend same or less than last year,[3]
*versus 59% in 2024*

**Respondents say that extracurricular activities are important for ...**[1]

- **87%** A child's mental health
- **83%** Developing skills that artificial intelligence can't compete with
- **55%** Keeping children engaged while the parents are at work

Note: *Deloitte calculations (n = 1,203).
Questions: (1) To what extent do you agree or disagree with the following statements? – % agree/strongly agree (n = 1,081); (2) How much do you plan to spend on extracurricular activities (e.g., dance, art, sports, etc.), including sign-up fees and equipment, this academic year? (n = 1,081); (3) How will your spending change on extracurricular activities (e.g., dance, art, sports, etc.), including the cost for sign-up fees and equipment? (n = 1,081).
Source: 2025 Deloitte Back-to-School Survey.

# Parents are considering tradeoffs as they contemplate the cost of a packed lunch

**42%**

of parents say their children bring lunch from home on most school days[1]

**$164** is the average amount respondents feel is reasonable to spend for daily lunch per month[2]

Questions: (1) What will your child/student most often do for lunch on a school day? (n = 1,153); (2) What do you feel is a reasonable amount of money to spend for a child's/student's daily lunch? (daily amount * 22 average school days a month; n = 479); (3) "Relative to last year, the prices we will pay for lunch on school days will likely be ..." – % higher/a lot higher (n = 479); (4) To manage higher lunch prices on days my child/student would normally bring a lunch to school, we may need to take the following actions in the year ahead: #multi-select (n = 229); (5) What type of meal planning assistance would be most helpful to you for school lunches? (n = 479); (6) To what extent do you agree or disagree with the following statements? – % agree/strongly agree (n = 479).
Source: 2025 Deloitte Back-to-School Survey.

## Retailers may have an opportunity to appeal to price-conscious customers looking for convenient lunch solutions

**48%** **of parents say that prices for lunch on school days will be relatively higher this year than last year[3]**

Of those who expect higher prices:[4]

**31%** will switch from name brands to more store brands/private labels
**27%** will switch to a lower-cost main lunch item
**22%** will buy less fresh and more shelf-stable food that won't spoil quickly

**Meal assistance plans that respondents say will be most helpful to them for school lunches[5]**


45% of parents say "What are we making for school lunch?" is a top pain point for their family[6]

# Shopping journey

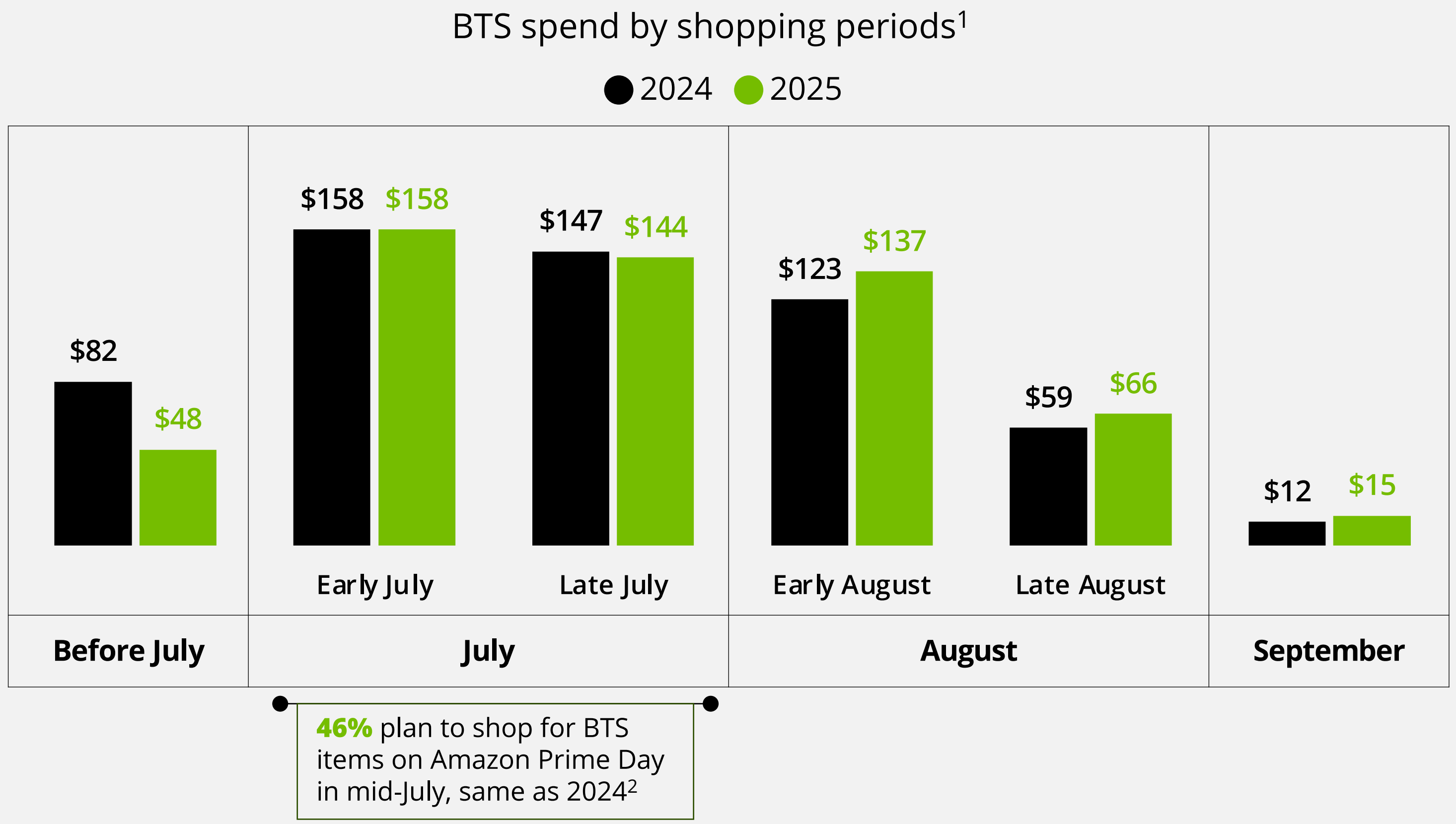
# Planned BTS spending is less front-loaded than last year

**61%**

of the planned BTS spend is expected to occur by the end of July,[1]
*versus 66% in 2024*

**49%** of parents are planning to spread out BTS purchases over time to manage the budget[1]

## Parents plan to jump on mid-July promotions




***Retail extra credit:*** *Shoppers have become accustomed to seeking out bargains during Prime Day in mid-July, so retailers can offer deals around the same period.*

Questions: (1) Out of the total you plan to spend on back-to-school shopping, how much do you plan to spend during the following periods? (n = 1,203); (2) Do you plan to shop for BTS items during Amazon's Prime Day sales event in July 2025? (n = 1,038).
Source: 2025 Deloitte Back-to-School Survey.

# Nearly half surveyed plan to spend the most at mass merchants

● 2024 ● 2025

## Top five retail formats where parents plan to spend the most:[1]

| 2024 | 2025 | |
|---|---|---|
| 40% | 46% | Mass merchant retailers |
| 21% | 20% | Online retailers |
| 7% | 7% | Specialty clothing retailers |
| 5% | 7% | Off-price retailers |
| 7% | 4% | Department stores |

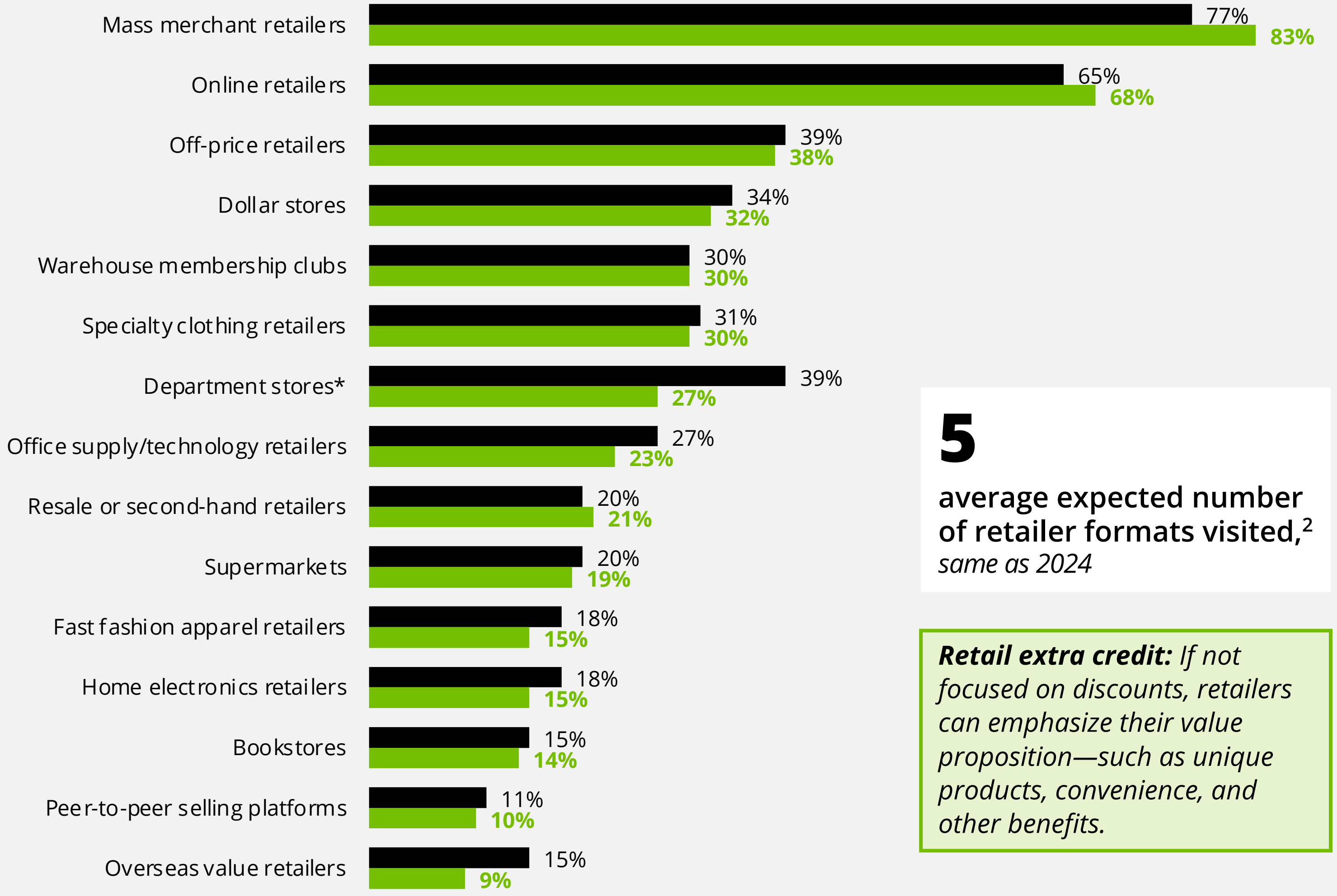
**Top three reasons for spending the most at that retailer:**

**#1** Value for money (54%)
**#2** One-stop shopping (39%)
**#3** Product availability (31%)

Notes: n = 1,203; *includes luxury department stores, which were added in 2025.
Questions: (1) At which type of retailer do you anticipate spending the most money this back-to-school shopping season?; (2) Which type of retailer(s) do you plan to visit for your back-to-school shopping? #multi-select.
Source: 2025 Deloitte Back-to-School Survey.

## Discount formats dominate top five preferred shopping destinations

Preferred retailer formats for BTS shopping[2]



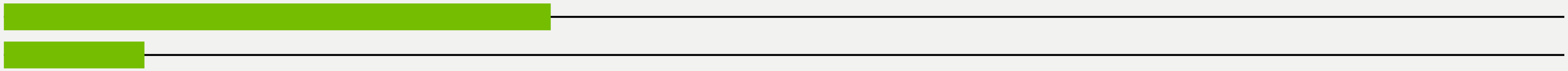

**5**
**average expected number of retailer formats visited,[2]**
*same as 2024*

***Retail extra credit:*** *If not focused on discounts, retailers can emphasize their value proposition—such as unique products, convenience, and other benefits.*

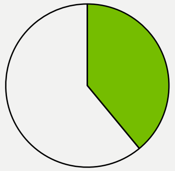
# Overseas value platforms losing luster as prices rise

## Very few plan to turn to these retailers for BTS shopping

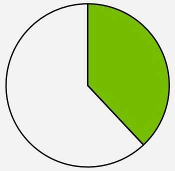
**35%** of parents have shopped with overseas value retailers in the past three months[1]



**BUT ONLY 9%** plan to shop for BTS products at these retailers[2]



**39%** have noticed **higher prices** at these retailers compared to six months ago[1]



**38%** have seen **fewer ads** for these retailers on social media in the past month[1]

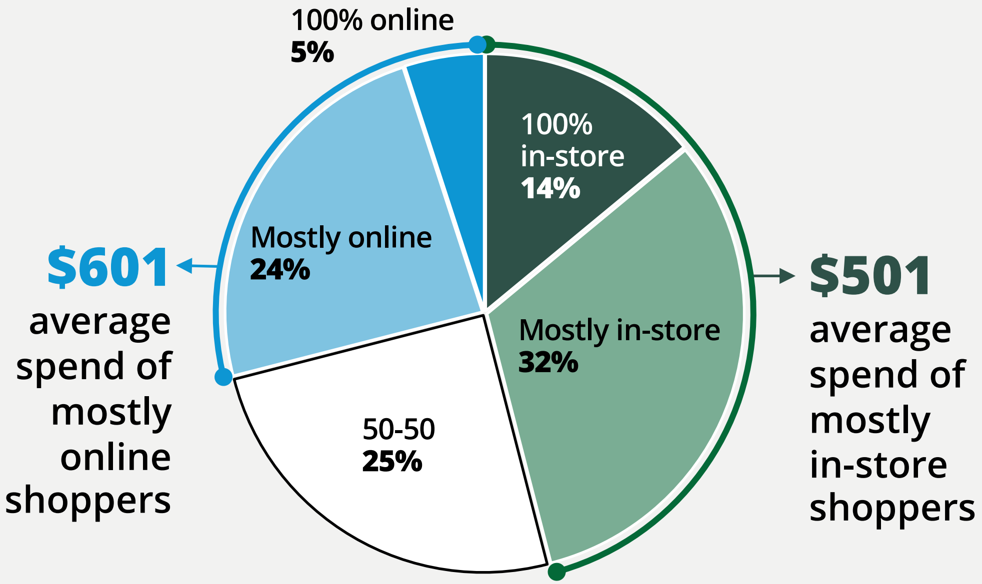
**19%** plan to use these retailers' websites to **research/discover BTS products[1]**

Note: n = 1,203.
Question: (1) To what extent do you agree or disagree with the following statements? – % agree/strongly agree; (2) Which type of retailer(s) do you plan to visit for your back-to-school shopping? #multi-select.
Source: 2025 Deloitte Back-to-School Survey.

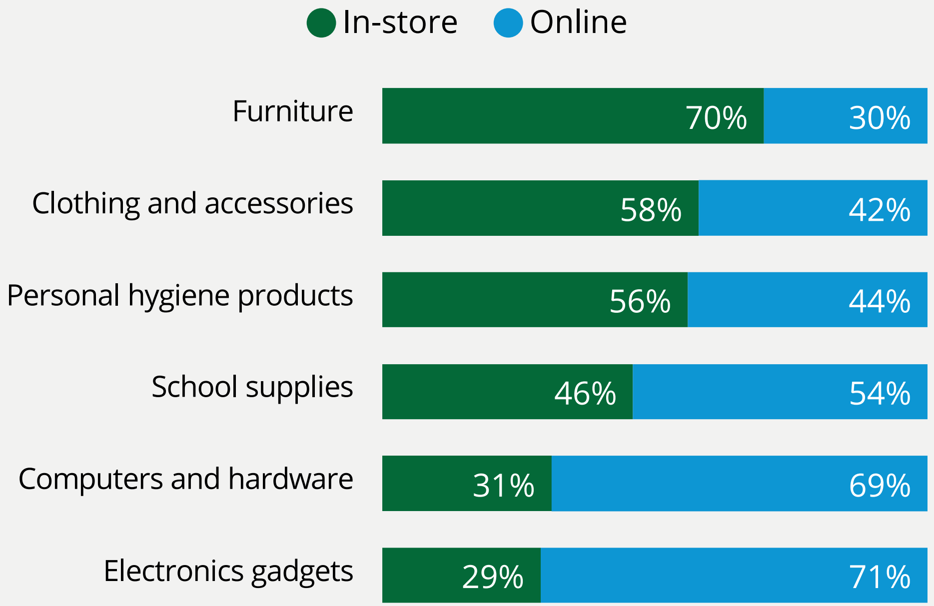
# In-store shopping is still a main draw, but parents plan to spend more online

## Parents are more inclined to purchase items like furniture and clothing in-store rather than online

Channel preference of parents for BTS[1]




Percentage of parents who would prefer to shop for these items **in-store** versus **online**[2]




Note: n = 1,203.
Questions: (1) What percentage of your total back-to-school spend do you expect to purchase in-store/online?; (2) I would rather purchase the following items online than in-store ... #multi-select.
Source: 2025 Deloitte Back-to-School Survey.

# Parents influenced by social media represent an opportunity as they spend more

# 41%

of parents plan to use social media for BTS shopping,[1]
*similar across income groups*

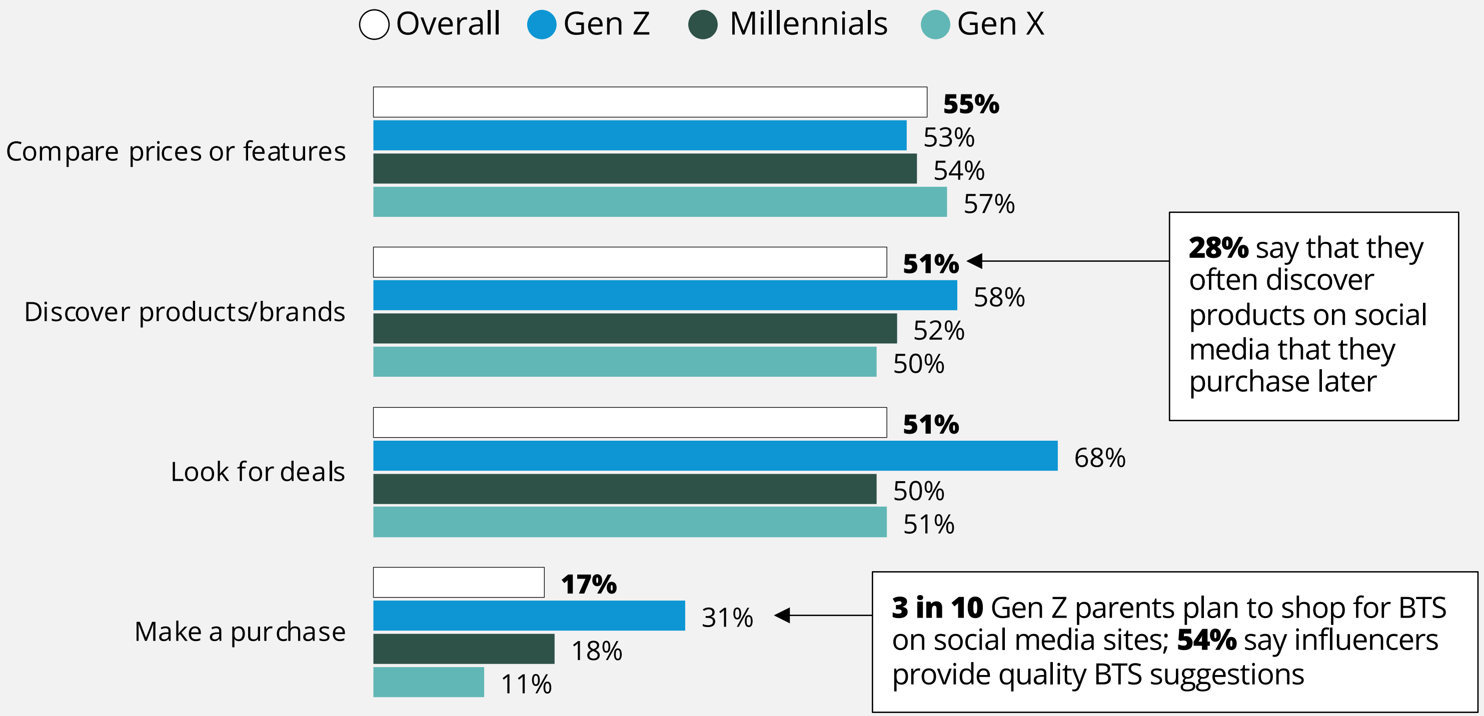
By generation:
**75%** Gen Z
**46%** Millennials
**31%** Gen X

Social media users are likely to spend **1.8x** compared to others

Notes: n = 1,203; Gen Z are born between 1997 and 2007, millennials between 1981 and 1996, and Gen X between 1965 and 1980 ; *Deloitte calculations (n = 492).
Questions: (1) How do you plan to use social media platforms for your back-to-school shopping? (n = 1,203); (2) To what extent do you agree or disagree with the following statements? – % agree/strongly agree (n = 1,203).
Source: 2025 Deloitte Back-to-School Survey.

## Younger parents are more likely than others to use social media sites to complete BTS purchases

Parents plan to use social media for ...*
(percentage of social media users)




**32%** of parents say influencer content is more trustworthy than brand content, but that number climbs to 59% for Gen Z[2]

# Generative AI for shopping is being embraced by younger parents

**33%**

of parents plan to use gen AI for BTS shopping,[1] although only **22%** trust it*

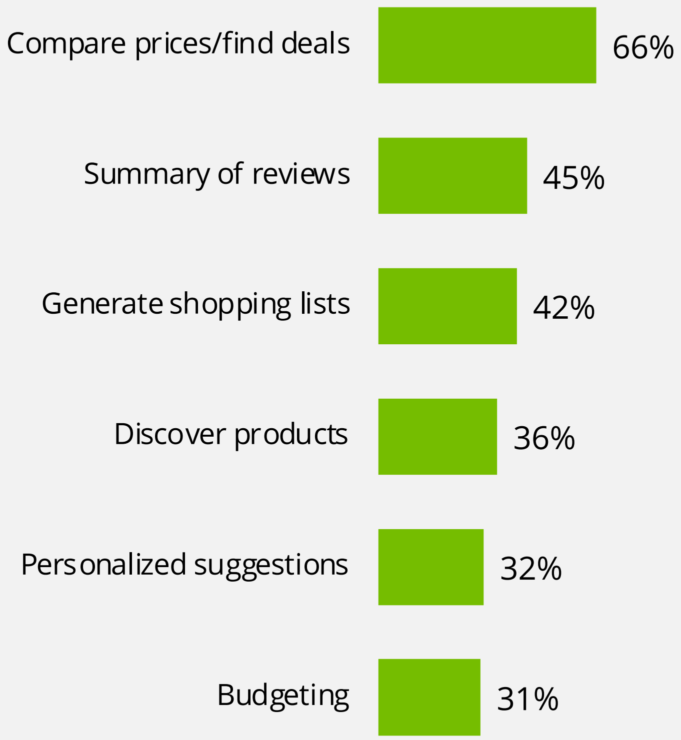
By generation:
**67%** Gen Z
**34%** Millennials
**29%** Gen X

Trust in AI for shopping is higher among younger parents
**54%** Gen Z
**24%** Millennials
**17%** Gen X

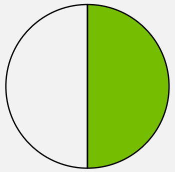
Notes: Gen Z are born between 1997 and 2007, millennials between 1981 and 1996, and Gen X between 1965 and 1980; *Deloitte calculations (n = 400).
Questions: (1) How do you plan to use generative AI for your back-to-school shopping needs?; (2) To what extent do you agree or disagree with the following statements? – % agree/strongly agree (n = 1,203).
Source: 2025 Deloitte Back-to-School Survey.

## Comfort in using AI is growing, but few use it actively

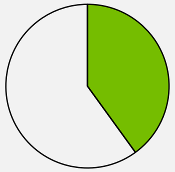
How are parents using gen AI?*
(percentage of gen AI users)




Percentage of surveyed parents[2]



**50%**
are aware of AI assistants on retailer websites, but only **17%** often use them



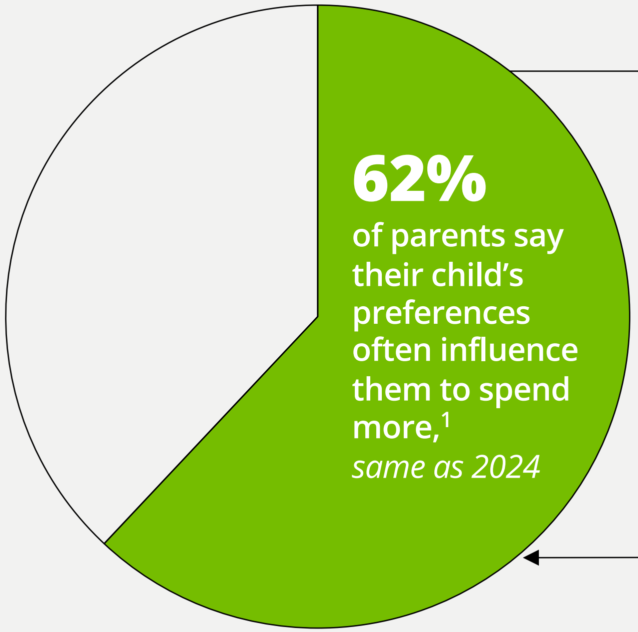
**40%**
feel more comfortable using AI now compared to six months ago

By generation:
**57%** Gen Z
**40%** Millennials
**38%** Gen X

# Consumer preferences

# Many parents are influenced to splurge on a “hot” BTS item or first-day outfit

## Most kids have a must-have item they want for BTS and most are influenced by their friends/family




**By household income:**

55% <$50K
65% $50K–$99K
65% $100K+

**By generation:**

63% Gen Z
63% Millennials
61% Gen X

**57%** are willing to spend a little extra on their child’s first-day outfit[1]

# 9 in 10

**parents say their children have a must-have item they want for BTS[2]**

Top three sources of discovery for these must-have BTS items:[3]

38% Friends/family
21% Retailer’s websites/stores
11% Social media

***Retail extra credit:*** *Retailers can adopt a marketing approach that emphasizes nostalgia and the thrill of the first day*

Notes: n = 1,203; Gen Z are born between 1997 and 2007, millennials between 1981 and 1996, and Gen X between 1965 and 1980.
Questions: (1) To what extent do you agree or disagree with the following statements? – % agree/strongly agree; (2) What is the one must-have product and/or brand that your child wants for back-to-school this fall?; (3) Where did your child discover their must-have item?
Source: 2025 Deloitte Back-to-School Survey.

# What could retailers expect going forward?

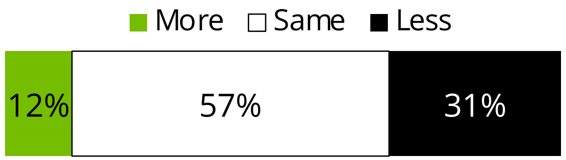
## Surveyed parents plan to approach the holidays with caution and a continued focus on promotions

### Consumers may continue to exhibit a conscious spending approach

**96%**

**of surveyed parents plan to shop for holiday gifts this year[1]**

Change in holiday spending YoY[1]
(among those who plan to shop)




### Deals and promotions are expected to play a role in driving traffic

**40%**

**of surveyed parents plan to shop for holiday gifts during the mid-July Amazon Prime Day sales[2]**

76% of surveyed retail executives say consumers will make discretionary purchases only during promotional periods this year*

### There maybe renewed interest in American-made products

**48%**

**of surveyed parents plan to buy American-made products as much as possible[3]**

**By generation:**

**62%** Gen Z
**47%** Millennials
**48%** Gen X

Note: Gen Z are born between 1997 and 2007, millennials between 1981 and 1996, and Gen X between 1965 and 1980.
Questions: (1) How will your 2025 holiday gift spending (for yourself or others) compare to last year? (n = 1,203); (2) Do you plan to shop for any of the following items during Amazon's Prime Day sales event in July 2025? (n = 1,038); (3) To what extent do you agree or disagree with the following statements? – % agree/strongly agree (n = 1,203).
Sources: 2025 Deloitte Back-to-School Survey; *2025 Deloitte Retail Buyers Executive Survey.

# About the survey

## Survey timing

May 21 to May 30, 2025

## Sample

The survey polled a sample of 1,203 parents of school-aged children, with respondents having at least one child attending school in grades K to 12 this fall. Generations are defined as: Gen Z (1997 to 2006), millennials (1981 to 1996), and Gen X (1965 to 1980). The survey has a margin of error of plus or minus 3 percentage points for the entire sample.

## Methodology

The survey was conducted online using an independent research panel.

## Thank you

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Insights

## Deloitte Consumer Industry Center

The Deloitte Consumer Industry Center provides premiere insights based on primary research on the most prevalent issues facing the consumer industry to help our clients run effectively and achieve superior business results. The center is your trusted source for information on leading trends and research that connect insights, issues, and solutions for Deloitte's four consumer sectors: automotive; consumer products; retail, wholesale, and distribution; and transportation, hospitality, and services.

## About the Deloitte Retail practice

The retail industry is transforming at lightning speed, and retailers are being forced to find ways to grow profitably while also meeting rising consumer expectations. Today's customers don't just expect the retail industry to operate efficiently, but empathetically too. They are buying into better and are demanding that brands share their values around purpose, inclusion, trust, transparency, and innovation.

Leaders in this rapidly shifting industry should have better insight, better innovation, and a better connection to their customers. That's why they turn to Deloitte. Driven by a relentless pursuit of innovation and the pulse of the consumer, Deloitte helps many of the world's leading brands in the retail sector align with their customers' values, create lasting competitive advantages, build enduring customer relationships, and shape the future of the industry. https://www.deloitte.com/us/en/Industries/retail/about.html