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Insights

# 2026 Deloitte Back-to-School Survey

Rewriting the value equation



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# Executive summary

In our 19th annual Back-to-School (BTS) Survey, families are approaching the season with the same disciplined caution that has defined the post-pandemic years. Expected spending per child holds flat at \$557, with an estimated BTS market of \$30.4 billion.<sup>1</sup> Inflation reached 4.2% in May,<sup>2</sup> and consumer sentiment remains weak: 57% expect the economy to worsen in the year ahead, the highest level reported in the survey since 2020. Parents are, however, taking it in stride, as value-seeking has become their default mode. Most BTS shoppers use at least one cost-saving tactic, while one-third employ four or more. Notably, these hyper-value seekers spend 14% more on average, offering opportunities for retailers to earn incremental dollars.

The promotional calendar is a main strategic lever for savvy value seekers: 68% of parents plan to shop for BTS goods during summer sales events that large retailers have conditioned consumers to look for in mid-July. This year, those promotions are shifting into June\* when some schools haven't even finished the academic year. It's yet to be seen if the early deals can tempt BTS shoppers, as our findings indicate that families are trying to spread out expenses, shifting a large chunk of expected spending into early August.

While budgets are flat, a shift is evident in what parents are purchasing. They plan to spend 22% more on clothing and accessories this year as they replace worn items and allow selective splurges; tech spending is expected to decrease by 16% as device upgrades get deferred. Spending on school supplies is expected to be flat as parents look to stick to what's on the list.

Digital tools are reshaping the BTS shopping landscape in ways retailers may not be able to afford to overlook. Planned spend is consistently higher among parents across all income groups who use a broader set of digital tools in their shopping journey. Non-tech users (20%) plan to spend \$381, while those planning to use search engines (30%) plan to spend \$494 on average. As respondents add additional tech tools, their spend goes up: Those using search and social media (21%) spend an average of \$539, and those who use search, social media, and gen AI (29%) have the highest planned spend at \$737. The implication is clear: The more digitally engaged the shopper, the greater the spending potential.

For retailers, an opportunity lies in going beyond just discounting to meet disciplined shoppers with sharper relevance. Parents are still spending, but they are making clearer trade-offs: prioritizing replacement items, using digital tools to plan, and timing purchases around value moments. Retailers that can make those decisions easier, more personalized, and more rewarding have room to capture growth even in a constrained season.

Notes: \*The survey was conducted before promotional dates were announced; All figures are in US\$.

Sources: <sup>1</sup>Deloitte calculations of BTS spend based on annual consumer survey projections (n = 1,207) and K-12 enrollment figures from the US Census Bureau's current population survey, school enrollment supplement; <sup>2</sup>Bureau of Labor Statistics, consumer price index.

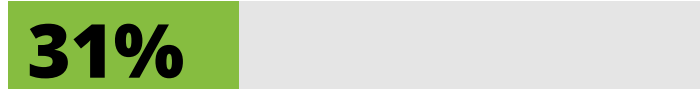
# Top takeaways

## Parents are doing the math

**\$557**

average expected BTS spend per child, versus \$570 in 2025, flat year over year

## The savviest shoppers spend big



of BTS shoppers are hyper-value seekers, adopting 4+ cost-saving behaviors yet spending 14% more

## Digital engagement spurs spending



respondents plan to use three tech tools in their BTS journey (search/social media/gen AI); they tend to spend more, with an average of \$737 per child

Notes: n = 1,207 (945 = search engine users; 575 = social media users; 400 = gen AI users); Questions: (1) "How much do you plan to spend on these categories during this back-to-school shopping season (June-September)?" (2) "To what extent do you agree or disagree with the following statements?" (percentage agree/strongly agree); (3) "Which of the following tools do you plan to use during your back-to-school shopping journey?" Source: 2026 Deloitte Back-to-School Survey.

# Cheat sheet

## Spending trends

Parents surveyed plan to spend an average **\$557 per child on BTS items this season (flat YoY)**. Spending caution persists as 57% expect economic conditions to worsen over the next six months.

The overall BTS market spend is estimated at \$30.4 billion (flat YoY). **Average spending on clothing and accessories is up (+22% YoY)**, while spending on **tech products (-16% YoY)**, **school supplies (-2% YoY)**, and **home, health, and other items (-6% YoY)** is all down.

**Lower-income (+10% YoY) and lower-middle-income (+12% YoY) parents surveyed expect to spend more due to higher prices**, while **upper-middle-income (-9% YoY) and higher-income (-20% YoY) parents are pulling back** given economic and financial concerns.

**50% of parents are cutting back on other expenses** to make room for BTS spending.

**59% say their child's preferences influence them to spend more** (versus 62% in 2025), and 45% say their child has a specific must-have item in mind, of which 57% say they will splurge on it.

Notes: Lower income (under \$50K); lower middle income (\$50K to \$99K); upper-middle income (\$100K to \$199K); higher income (more than \$200K).

## Shopping journey

**Forty-eight percent of planned BTS spend is expected to occur by the end of July** (versus 61% in 2025), as families push purchases closer to the school start date. **Early August average spend has risen to \$173 per child** (versus \$137 in 2025).

**Sixty-eight percent of parents surveyed plan to shop during summer promotional events for BTS items**, with clothing and school supplies topping their lists. **Fifty-four percent say discounts and promotions often lead them to make unplanned purchases.**

**Parents plan to shop across four retail formats on average**, down from five in 2025. Mass merchants and online retailers remain the top destinations, with value for money, one-stop shopping, and convenience as the top three drivers of retailer choice.

**Forty-nine percent of those surveyed plan to spend most of their budget in-store**, with an average spend of \$521, while **27% plan to spend mostly online**, with an average spend of \$614.

Across income groups, respondents using digital tools tend to spend more on BTS shopping: Non-tech users plan to spend \$381, while those using search engines spend an average of \$494, search and social media users spend \$539 and **those using search, social media, and gen AI have the highest average spend at \$737.**

## Consumer preferences

Parents are approaching BTS with intention rather than restraint. **Seventy-one percent of respondents are willing to switch brands and 60% plan to shop at more affordable retailers**, not necessarily to spend less, but to maximize value. **Private-label adoption remains steady at 51%**, while **25%** plan to use cashback websites.

**Thirty-one percent** of parents qualify as **hyper-value seekers**, adopting four or more cost-saving behaviors. Despite their deal-seeking mindset, they **spend an average of about \$610 per child, 14% more** than other shoppers, underscoring that value-seeking is more about selectivity than austerity.

Looking ahead, **58% of parents surveyed expect to purchase holiday gifts during summer BTS promotional events. Promotion-driven shopping** is also the most commonly cited change expected in holiday shopping behavior.

# Spending trends



# Respondents continue to approach back-to-school spend cautiously amid economic uncertainty

## BTS market spend flattens as inflation hangover lingers

Reasons for cautious spending

**57%**

parents expect the economy to worsen in next six months<sup>1</sup>  
*highest since 2020*

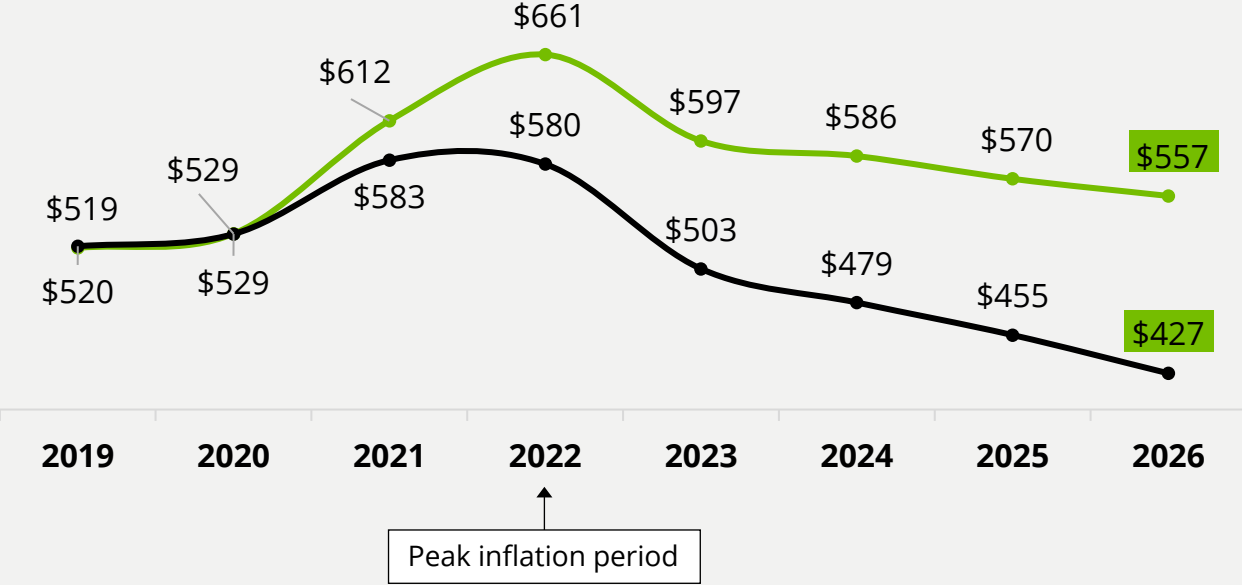
**24%**

parents are concerned about making upcoming payments<sup>2</sup>

Notes: n = 1,207; Questions: (1) "In your opinion, what is your overall outlook for the US economy in the next six months in 2026 compared with today?"; (2) "To what extent do you agree or disagree with the following statements?"; (3) "How much do you plan to spend on these categories during this back-to-school shopping season (June–September)?"; \*Adjustment uses CPI-U (BLS) May values for each year vs. May 2020 CPI of 256,394; 2020 nominal ≈ adjusted by definition; 2026 values are based on projected CPI.  
Sources: 2026 Deloitte Back-to-School Survey; <sup>a</sup>Bureau of Labor Statistics, consumer price index; <sup>b</sup>Ibid.

## Average BTS spend per child<sup>3</sup>

● Nominal (reported) ● Inflation adjusted (May 2020)\*



**4.2%** US consumer price index, percentage change (May'25–May'26)<sup>a</sup>

**3.4%** US nominal average hourly earnings, percentage change (May'25–May'26)<sup>b</sup>

# Back-to-school spend remains constrained

**+26.3%**

Nominal wage growth\*  
(2020 → 2026)

**+30.6%**

Cumulative CPI inflation\*  
(2020 → 2026)

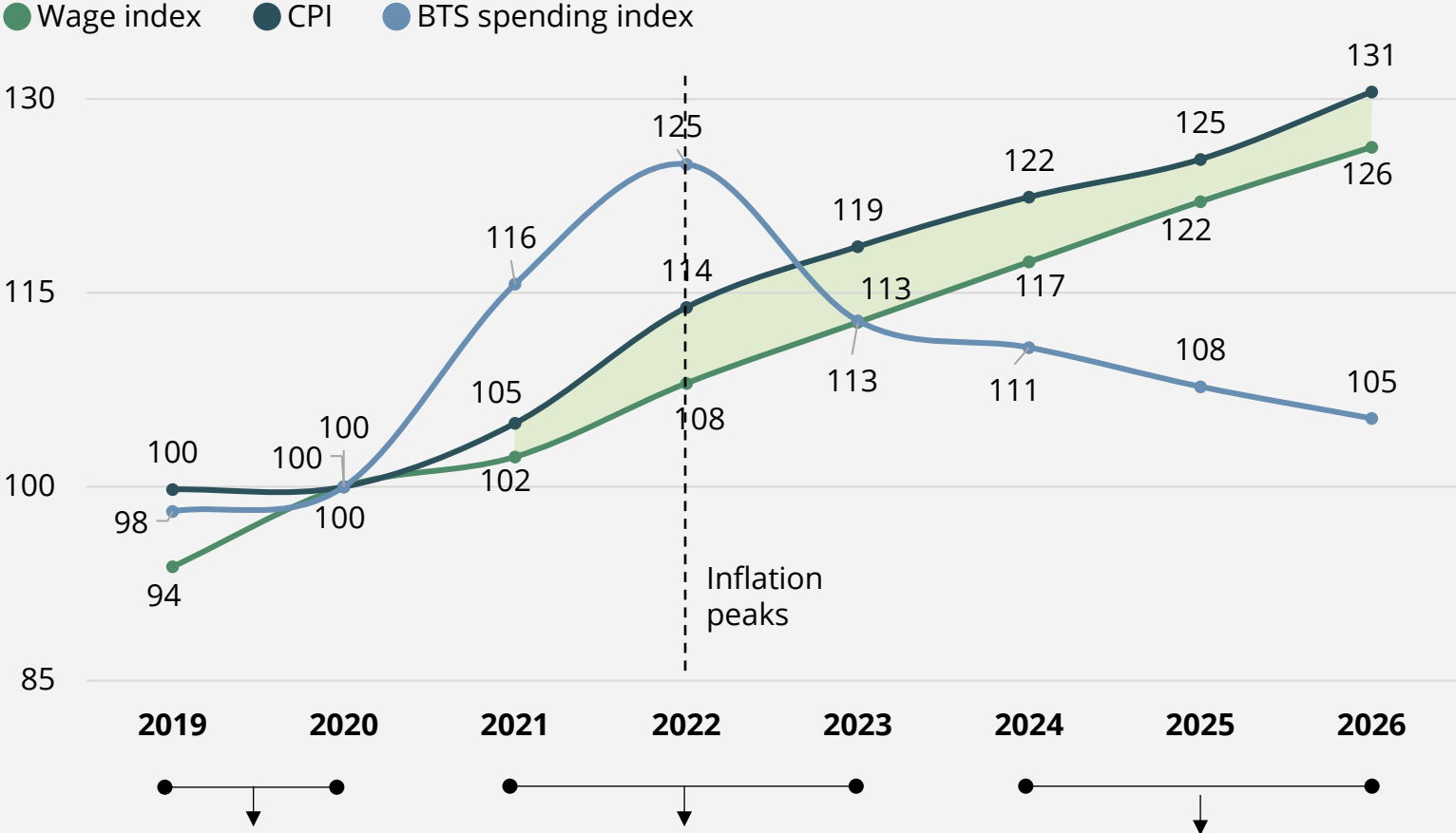
**+5.3%**

Nominal BTS spend growth\*  
(2020 → 2026)

Notes: \*Nominal wage index: BLS average hourly earnings, all private employees (CES0500000003) via FRED, May values, seasonally adjusted; CPI: BLS CPI-U (CPIAUCSL) via FRED, May values, seasonally adjusted; Both indices: May 2020 = 100. Sources: <sup>a</sup>US Bureau of Labor Statistics; <sup>b</sup>2026 Deloitte Back-to-School Survey.

## Real purchasing power has not recovered, and back-to-school spending reflects it

Nominal wage index, CPI,<sup>a</sup> and BTS spend index,<sup>b</sup> May 2020 = 100



**Pre-squeeze**  
Wages and CPI track closely—BTS budgets remain stable

**Inflation overtakes wages**  
CPI pulls ahead—real BTS purchasing power peaks then erodes sharply

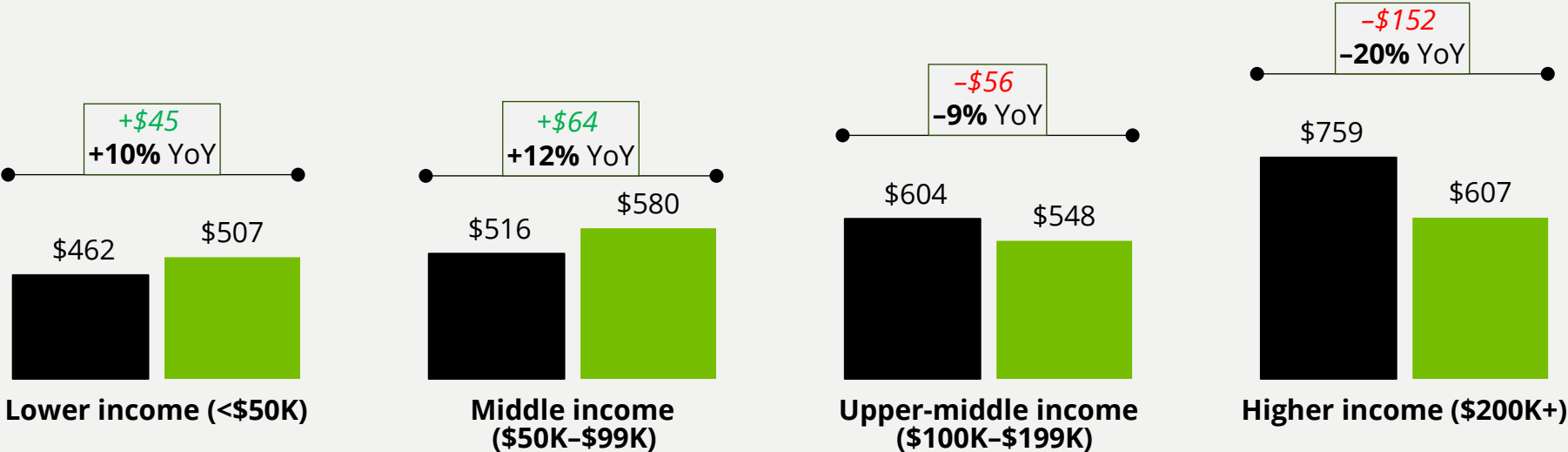
**Hangover persists**  
Gap remains—families trade off elsewhere

# Parents surveyed are protecting back-to-school spend by making trade-offs elsewhere

Lower- and lower-middle-income households are expected to increase back-to-school spending, while upper-middle and higher-income households surveyed expect to pull back

Average BTS spend per child, by household income<sup>1</sup>

● 2025 ● 2026



Top reason for spending less or more YoY<sup>2</sup>

80% cited higher prices for spending more

71% said prices are generally high for spending more

67% are concerned about the economy and thus spend less

63% have less money to spend this year and are spending less

Cut back on other expenses<sup>3</sup>

62% versus 72% in 2025

54% versus 63% in 2025

48% versus 44% in 2025

33% versus 18% in 2025

Notes: Questions: (1) "How much do you plan to spend during this BTS shopping season (June to September)?" (n = 1,207); (2) "Why do you expect to spend more/less on back-to-school items this year?" (n = 1,207 [452 = spending more; 166 = spending less; 574 = spending same; 15 = did not shop last year]); (3) "To what extent do you agree or disagree with the following statements?" (percentage agree/strongly agree) (n = 1,207). Source: 2026 Deloitte Back-to-School Survey.

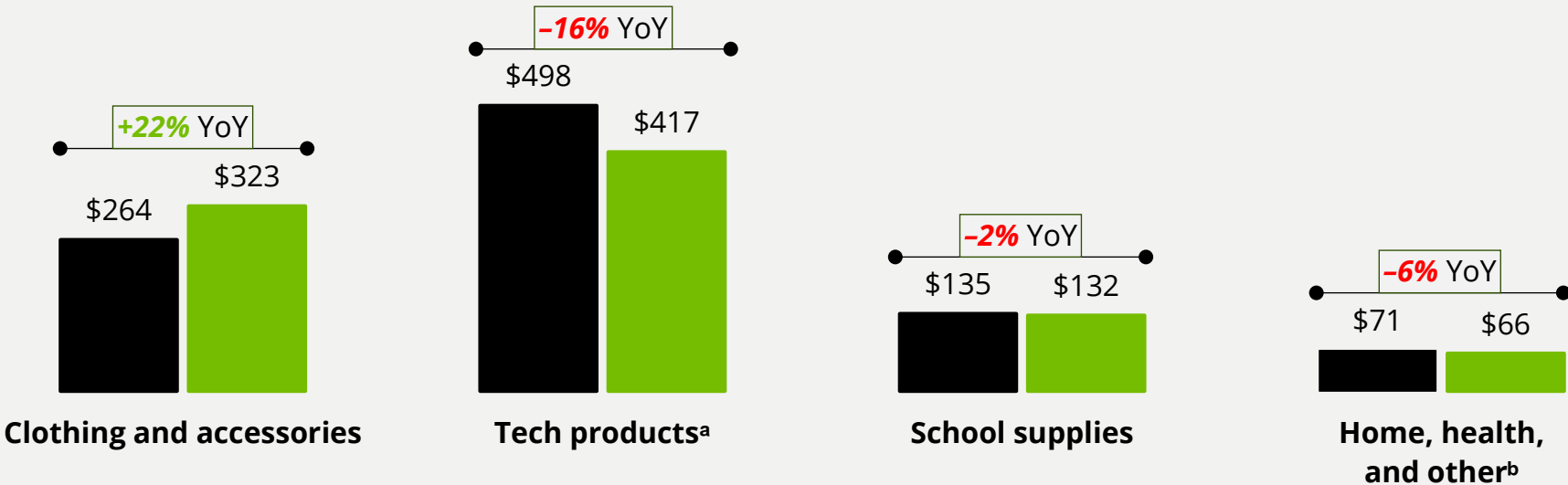
# Budgets hold, but respondents plan to shift dollars from tech to clothing

Despite wanting to spend more on clothing and accessories, it's the #1 category people would cut if budgets get too tight<sup>1</sup>

Average spend on BTS, by category<sup>2</sup>

● 2025 ● 2026

**\$30.4B**  
 Estimated market spend,  
 flat YoY, versus \$30.9B in 2025\*



Category	2025	2026
Percentage shopping the category*	93%	93%
Share of spend*	43%	54%
	29%	22%
	26%	16%
	98%	96%
	23%	23%
	63%	56%
	8%	7%

Notes: n = 1,207; Questions: (1) "If your budget becomes too tight, which of the following categories are you likely to switch to a lower-priced option or private/label?"; (2) "How much do you plan to spend on these categories during this back-to-school shopping season (June to September)?"; \*Deloitte calculations on BTS spend based on annual consumer survey projections (n = 1,207); (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: 2026 Deloitte Back-to-School Survey.

# Promotional events are becoming a critical back-to-school shopping moment

**68%**

of parents surveyed plan to shop for BTS items during summer promotional events<sup>1</sup>

Clothing and school supplies top parents' summer promotional shopping lists<sup>2</sup>

**54%**

of parents surveyed cited discounts or promotions often lead them to make unplanned purchases<sup>3</sup>

## Summer promotional events anchor the BTS journey and are even kickstarting the holiday season for some

Percentage of parents planning to shop during summer promotional events, by occasion<sup>1</sup>

	Online-only merchant promotional event	Mass merchant promotional event	Other promotional events	Not sure
<b>BTS items</b>	41%	57%	7%	17%
<b>Holiday gifts</b>	48%	41%	7%	19%

**Retail extra credit** Summer promotional events could be used to bundle core BTS categories with impulse-friendly add-ons, as discounts can encourage unplanned purchases.

Notes: Questions: (1) "Please indicate what type of products you plan to purchase during summer promotional events?" (n = 1,207); (2) "Which of the following back-to-school items do you plan to purchase during these summer promotional events?" (n = 872); (3) "To what extent do you agree or disagree with the following statements?" (percentage agree/strongly agree) (n = 1,207). Source: 2026 Deloitte Back-to-School Survey.

# Hyper-value seekers: The more they hunt for deals, the more they spend

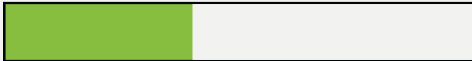
Hyper-value seekers\* plan earlier, respond more to promotions, and spend 14% more

**31%** of parents are "hyper-value seekers"

**14%** higher spend than other shoppers; ~\$610 per child

How are "hyper-value seekers" different?

Start shopping earlier



**40%** begin by end of July vs. **30%** of others

Respond strongly to discounts



**73%** say discounts trigger unplanned purchases vs. **47%** of others

Are influenced by children



**69%** say kids can influence them to splurge vs. **50%** of others

**Actively pursue deals**  
~**1.5x** more likely to shop at major summer promotional events

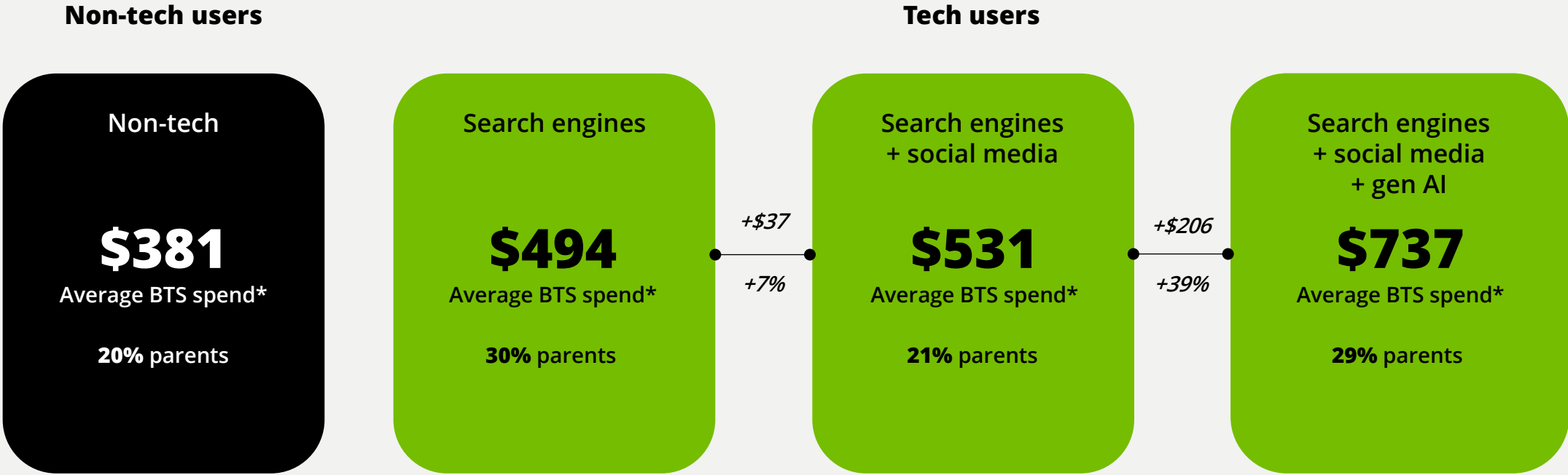
**Shop across more formats**  
Higher use of big box, warehouse clubs, online, and specialty retailers

**Retail extra credit**  
Retailers can target hyper-value seekers with early deals and add-on offers, since they chase promotions but still spend more.

Notes: n = 1,207; Question: "To what extent do you agree or disagree with the following statements?" (percentage agree/strongly agree); \*Hyper-value seekers are parents who adopt four or more of the following five money-saving behaviors: switching to a cheaper brand, choosing private label over name brands, shopping at more affordable retailers, buying in bulk, and using cashback websites. Source: 2026 Deloitte Back-to-School Survey.

# Respondents across income groups using digital tools tend to spend more on back-to-school shopping

Planned spend is consistently higher among parents who use a broader set of digital tools in their shopping journey



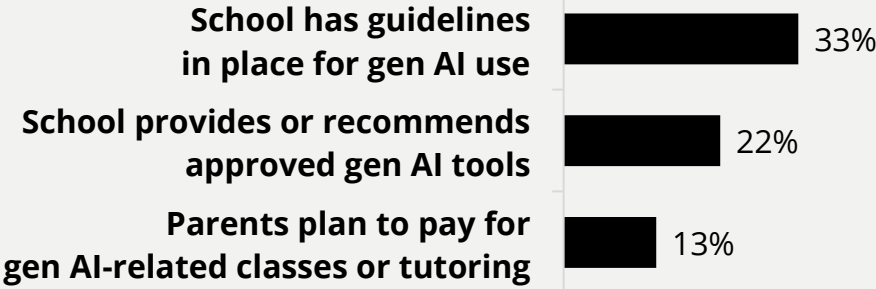
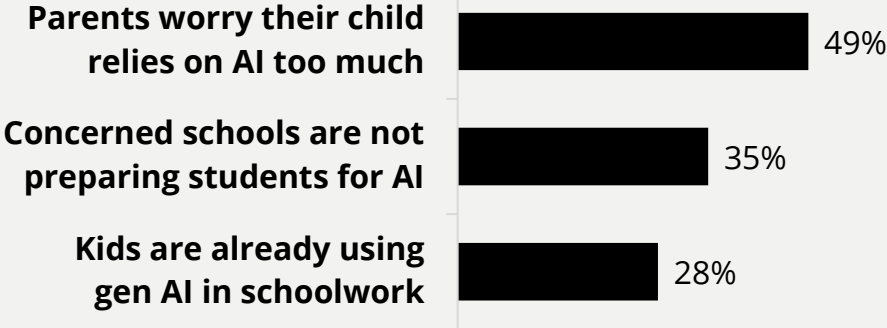
Notes: n = 1,207 (225 = non-tech users; 982 = tech users); 107 respondents who used social media or gen AI without search engines are excluded from this tiered framework; Question: "Which of the following tools do you plan to use during your back-to-school shopping journey?"; \*Deloitte calculations. Source: 2026 Deloitte Back-to-School Survey.

# Meanwhile, students are using AI faster than schools are adapting

Concerns about reliance and readiness are emerging as many parents surveyed remain unsure about school guidance

Reality: Rapid adoption

Gap: Slow formalization



## Why it matters

**49%**

worry their child relies on AI too much, while only 33% say their school has AI guidelines

**38%**

do not know if their kid's school has AI guidelines, signaling a communication as well as a policy gap

**13%**

of parents plan to pay for AI tutoring or camps, a potential market signal for edtech and retailers alike

Notes: n = 1,151; Question: "How would you answer the following when it comes to using generative AI tools in schools?"  
Source: 2026 Deloitte Back-to-School Survey.

# Shopping journey



# Families are pushing back-to-school purchases closer to the start of school

**48%**

of the planned BTS spend among respondents is expected to occur by the end of July

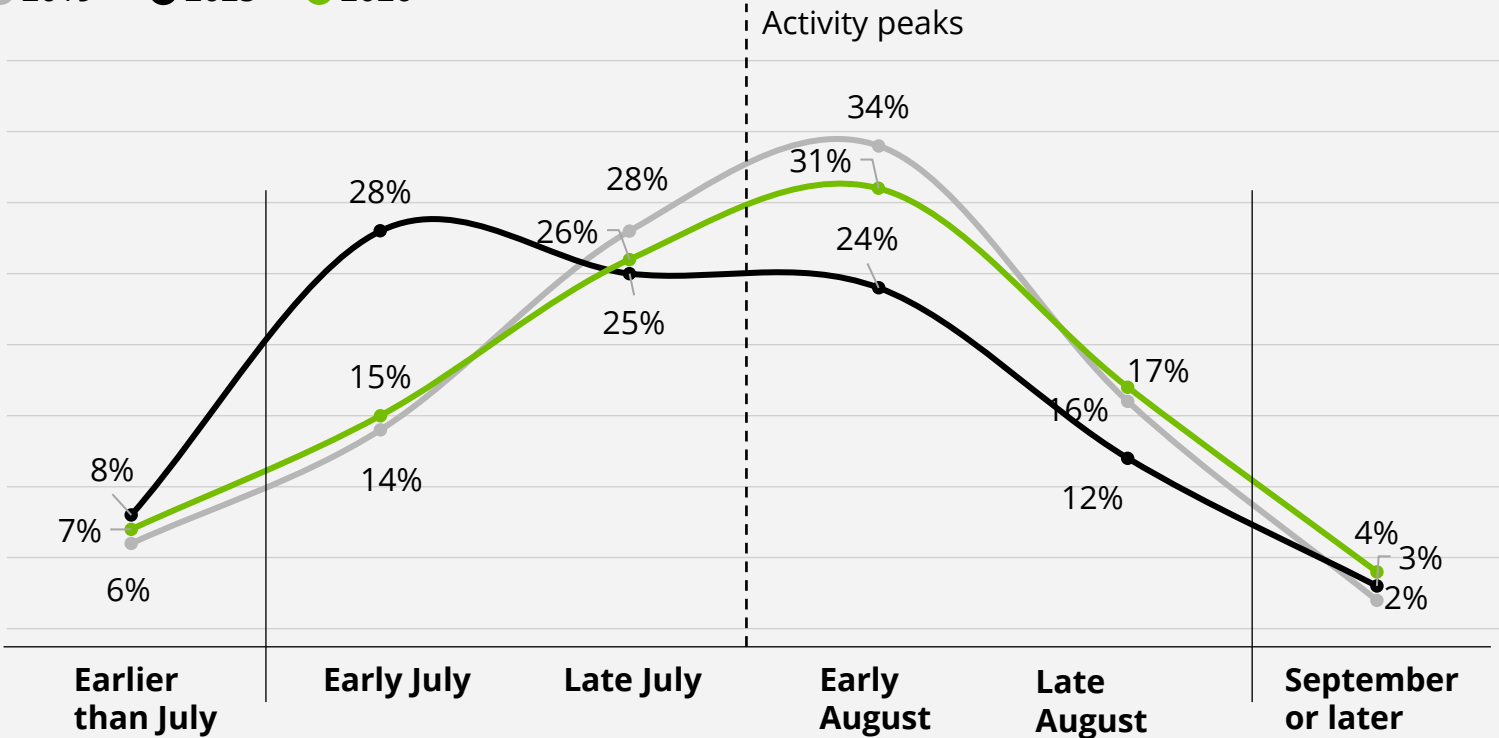
**\$173** is the average expected spend for BTS items in early August\*\* versus \$137 in 2025, +25%

Notes: n = 1,207; Question: "Out of the total you plan to spend on back-to-school shopping, how much do you plan to spend during the following periods?"; \*Advancement of major promotions may lead to shift in shopping period trends; \*\*Deloitte calculations. Source: 2026 Deloitte Back-to-School Survey.

## Shoppers are less concentrated in the early season, with planned activity peaking in late July and early August, reverting to pre-COVID-19 trends\*

BTS spend by shopping periods

● 2019 ● 2025 ● 2026



**Retail extra credit**

Retailers may need to plan for a longer selling season rather than a single June or July peak.

# Mass merchants remain parents' top back-to-school shopping destination

## Retail formats where respondents expect to spend the most:<sup>1</sup>

2025	2026	
46%	46%	Mass merchant retailers
20%	20%	Online retailers
4%	6%	Department stores
7%	5%	Specialty clothing stores
7%	5%	Off-price stores

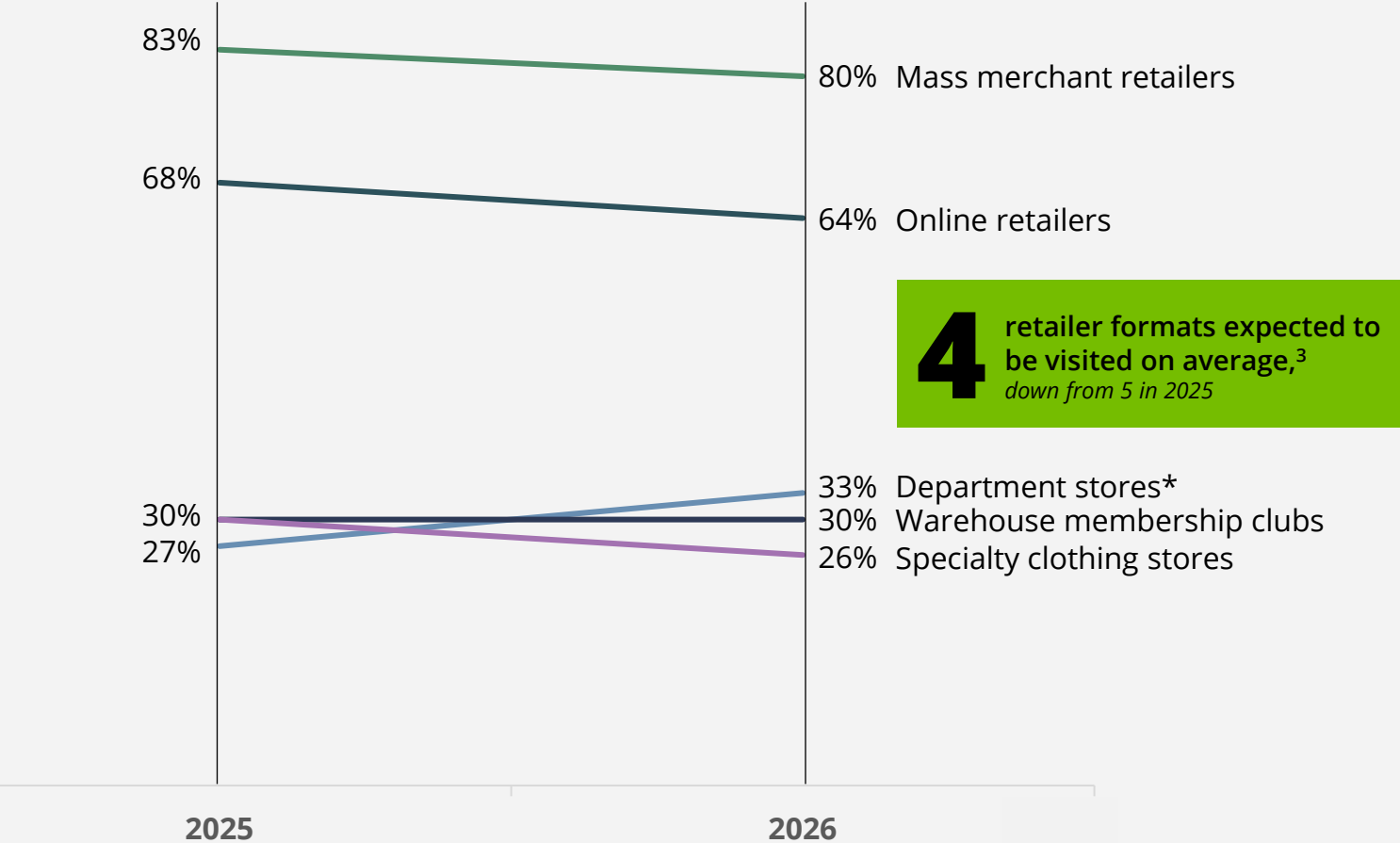
## Key drivers of top retailer choice:<sup>2</sup>

- #1 Value for money
- #2 One-stop shopping
- #3 Convenience

Notes: Questions: (1) "At which type of retailer do you anticipate spending the most money this back-to-school shopping season?" (n = 1,207); (2) "Why are you likely to spend the most at your preferred retailer for back-to-school products?" (n = 980); (3) "Which type of retailer(s) do you plan to visit for your back-to-school shopping?" (multi-select) (n = 1,207); \*Includes luxury department stores, which were added in 2025. Source: 2026 Deloitte Back-to-School Survey.

## Retailers may need to prioritize basket-building strategies as shoppers reduce the number of planned shopping formats

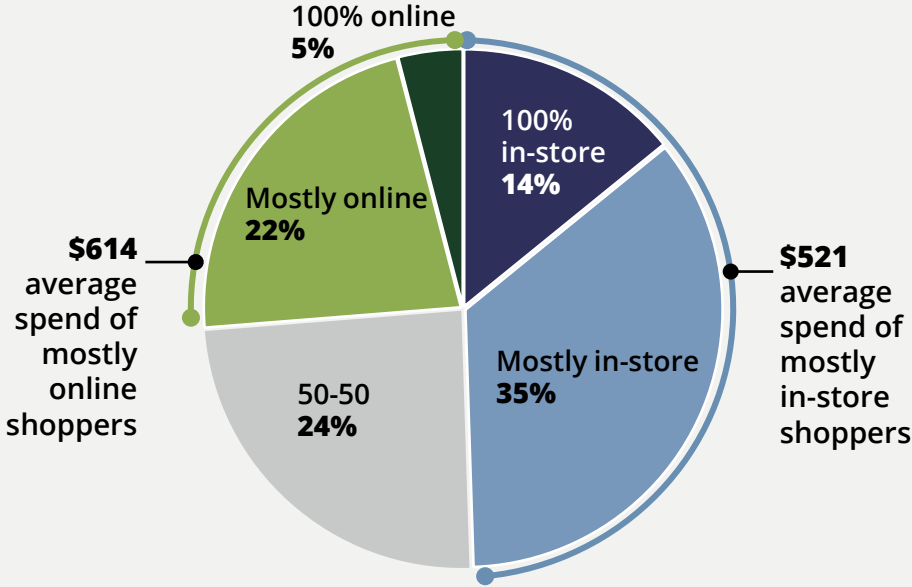
Top five retailer formats parents plan to visit for BTS shopping<sup>3</sup>



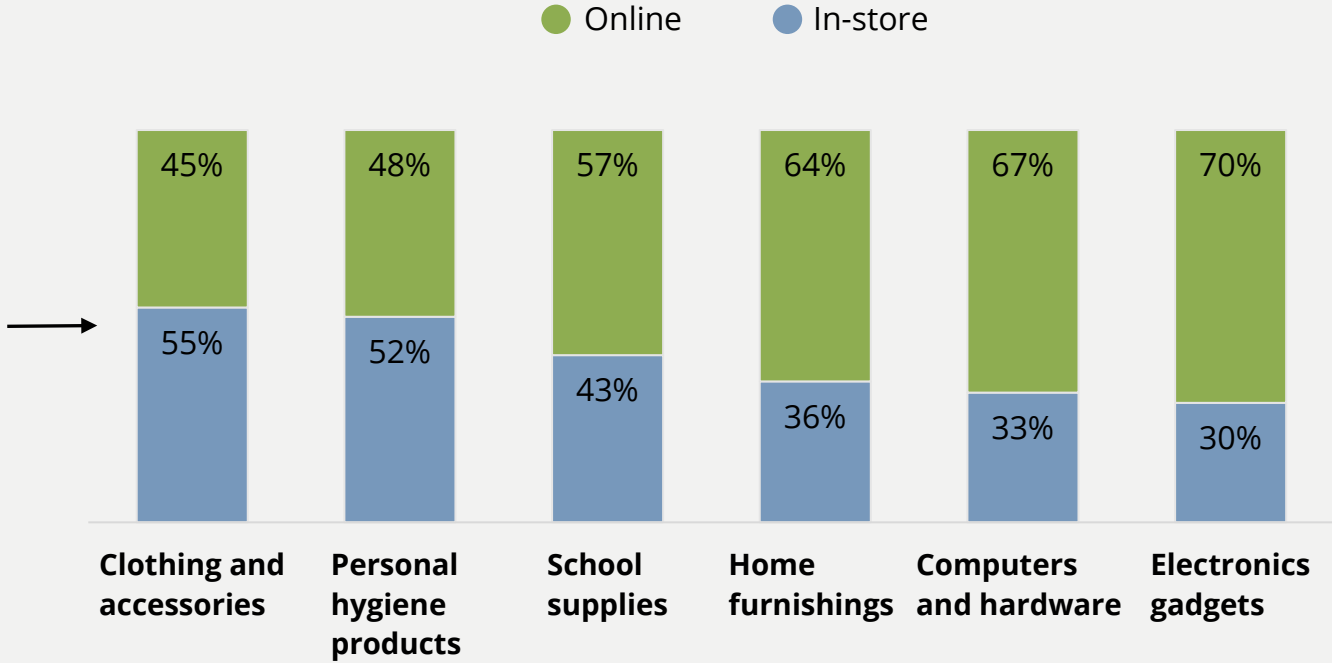
# Back-to-school spending largely skews in-store, while online leads in select categories

**Purchases are expected to mostly occur in store, but online offers retailers an opportunity to boost average spending**

Expected BTS spend allocation: Online vs. in-store<sup>1</sup>



Percentage of parents who would prefer to shop for these items in-store versus online<sup>2</sup>



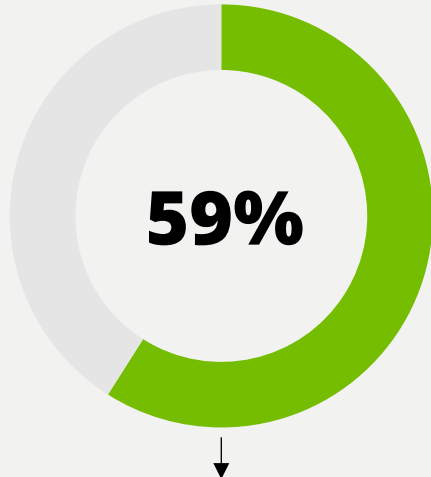
Notes: n = 1,207; Questions: (1) "What percentage of your total back-to-school spend do you expect to purchase in-store/online?"; (2) "I would rather purchase the following items online than in-store ..." (multi-select).  
Source: 2026 Deloitte Back-to-School Survey.

# Consumer preferences



# Children's must-have items are creating back-to-school splurge moments

Parents surveyed say children's preferences shape spending decisions, with must-have items often tied to splurging during the back-to-school season



of parents say their child's preferences often influence them to spend more<sup>1</sup>

*versus 62% in 2025*

By household income:

52%	Under \$50K
60%	\$50K to \$99K
59%	\$100K to \$199K
66%	More than \$200K



**45%** parents say their child has a specific must-have item for BTS,<sup>2</sup> and of these ...



**57%** say their child influences them to splurge on those items<sup>3</sup>

Top 3 must-have item categories<sup>2</sup>

- #1 Footwear
- #2 Backpacks
- #3 Electronic gadgets

**Retail extra credit**

Retailers can place hot BTS items near value bundles to help turn splurge moments into larger baskets.

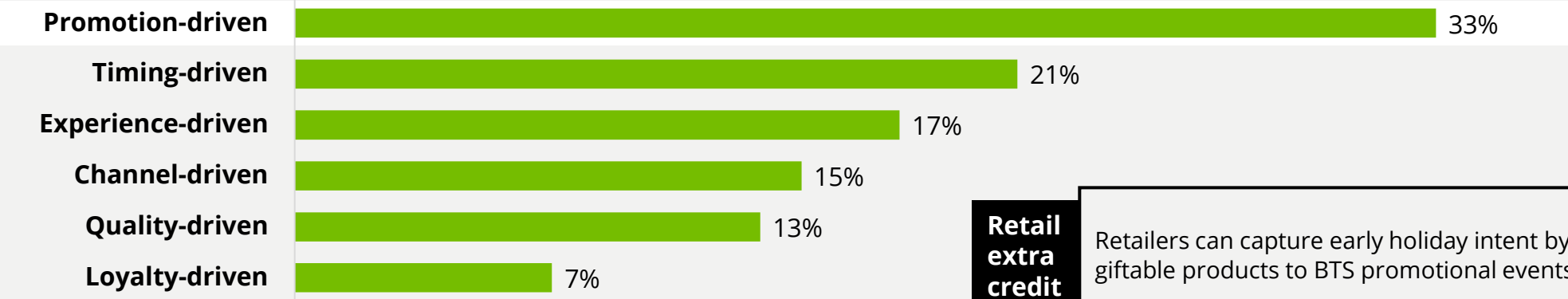
Notes: Questions: (1) "To what extent do you agree or disagree with the following statements?" (percentage agree/strongly agree) (n = 1,207); (2) "What is the one must-have product and/or brand that your child wants for back-to-school this fall?" (n = 1,207); (3) "Can your child/children influence you to splurge on the must-have product and/or brand?" (n = 541).  
Source: 2026 Deloitte Back-to-School Survey.

# Looking ahead: Retailers can leverage back-to-school promotional events to engage holiday shoppers early

Holiday gift purchase intent is strong, with respondents already considering summer promotional events and shopping occasions ahead of the holiday season

**58%** of parents plan to shop for holiday gifts during summer promotional events<sup>1</sup>

Expected change in holiday shopping behavior<sup>2</sup>



**Retail extra credit** Retailers can capture early holiday intent by adding giftable products to BTS promotional events.

Notes: Questions: (1) "Please indicate what type of products you plan to purchase during summer promotional events?" (n = 1,207) (spending comparisons are between respondents planning to shop summer promotional events and those not planning to shop any summer promotional events; respondents who were unsure are excluded); (2) "Which of the following best describes the biggest change you expect in your holiday shopping behavior this year?" (multi-select) (n = 1,148).  
Source: 2026 Deloitte Back-to-School Survey.

# About the survey

## Survey timing

May 22 to May 29, 2026

## Sample

The survey polled a sample of 1,207 parents of school-aged children, with respondents having at least one child attending school in grades K to 12 this fall. The survey has a margin of error of plus or minus three percentage points for the entire sample.

## Methodology

The survey was conducted online using an independent research panel.

## Thank you

The authors would like to thank **Sanjay Mallik Vadrevu, Anup Raju, Rithu Mariam Thomas, and Kianna Sanchez** for their contributions to this survey.

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