

INSIGHTS REPORT

Back-to-College 2026

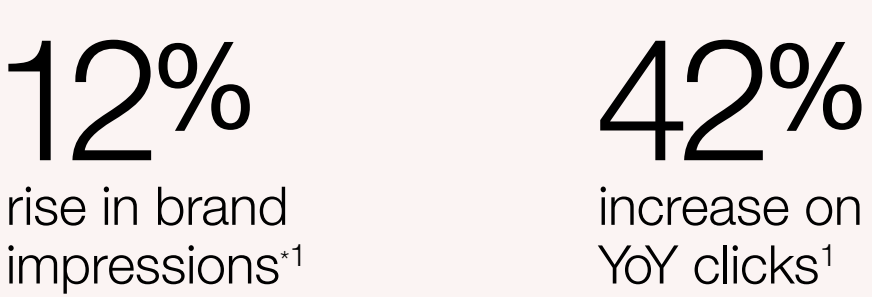
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Shopping for college starts long before the first class

Months ahead of move-in day, college students are preparing for a new chapter defined by independence, self-expression, and first-time purchasing decisions. Backed by first-party data from 100M+¹ Target guests, Roundel helps brands show up across every moment along the way.

Target’s top-performing campaign in 2025.



¹Well above benchmark and unmatched through Q3 '25

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Through this report, we’ll reference our audience in a shorthand way. Here’s a cheat sheet.

BTC —→ Back-to-college

Discovery shapes dorm décor decisions

Before students ever arrive on campus, creators and social content are influencing the products, brands, and dorm essentials that make it into the cart and help define college life.



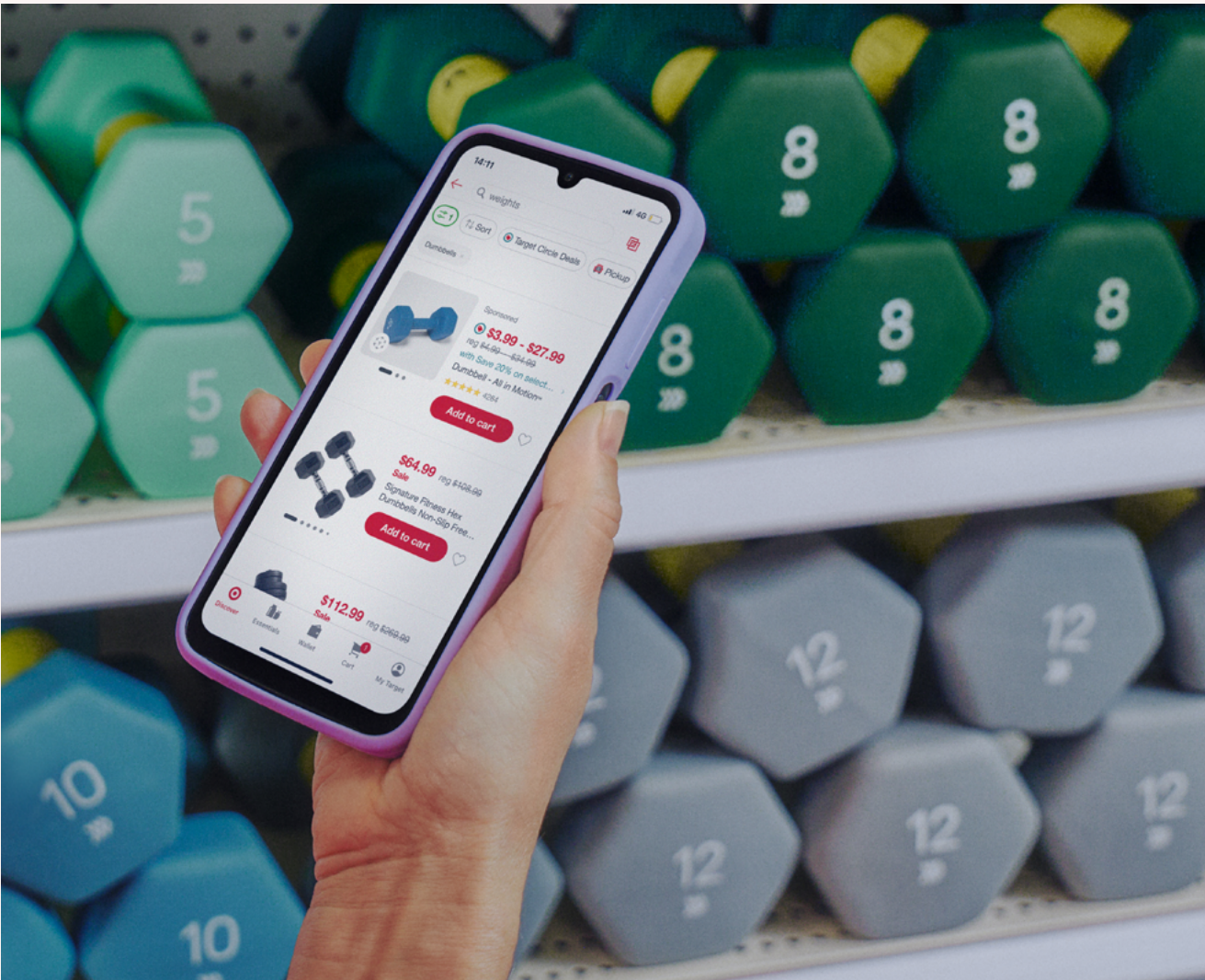
50%

of students **expect to use social media** during their BTC journey²



77%

of Gen Z **use TikTok to find new products**³



Online discovery leads to in-store carts

97%

of Gen Z shoppers **still shop in-store**⁴

76%

of Target guests **browse online while shopping in-store**¹



Value drives the cart. Convenience drives the choice

77%

shop sales events like Target Circle™ Week to maximize savings⁴

Solutions for the modern college journey

Connect with college students where it counts with our suite of omni-channel solutions.

Discover

Influence what makes the list by showing up during moments of inspiration and exploration.

- Social by Roundel™
- Influencers by Roundel™
- Display by Roundel™
- In-Store Activations

Planning

Turn consideration into intent as guests research products and prepare to buy.

- Search Ads by Roundel™
- Target Product Ads by Roundel™



Connect with Roundel to explore and curate the right solutions for your brand.

Convenience

Reduce friction throughout the journey, moving guests seamlessly from discovery to purchase.

- Search Ads by Roundel™
- Target Product Ads by Roundel™
- In-Store Service Hubs by Roundel™

Value Seeking

Build confidence in purchase decisions by reinforcing value when it matters most.

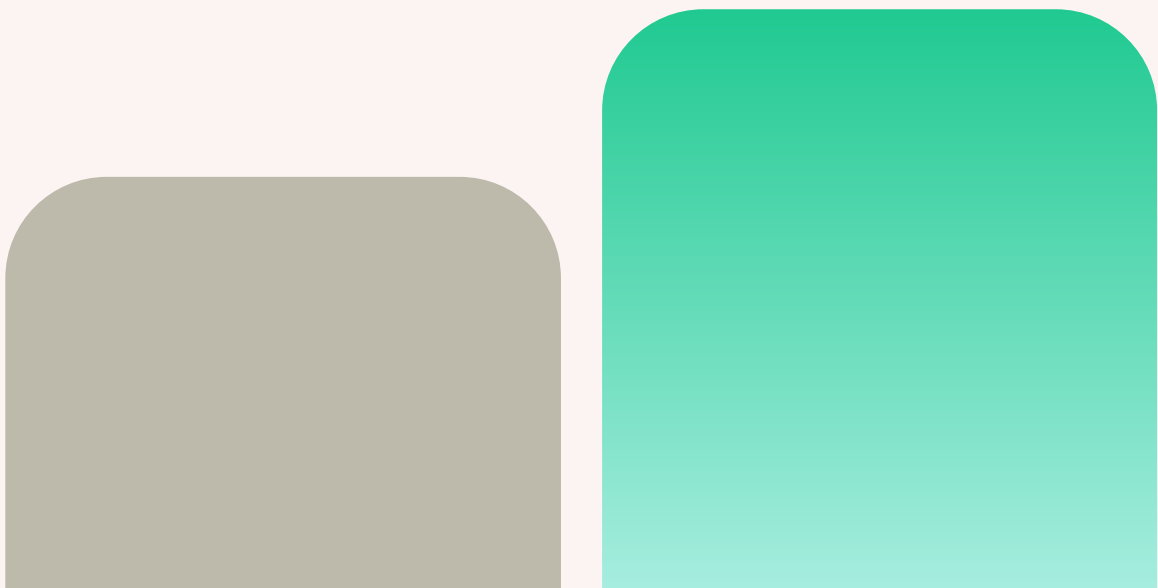
- Display by Roundel™
- Target Product Ads by Roundel™



Essentials & Beauty

As students prepare to live on their own, everyday essentials become everyday responsibilities. Beauty, personal care, and cleaning products help students establish new routines and feel confident away from home.

● 2024
● 2025



41%

YoY increase in of ROAS for Search in Beauty as students stocked up for everyday campus life¹

TOP BEAUTY SEARCH TERMS:

- body wash
- shampoo
- sunscreen
- mascara
- lotion

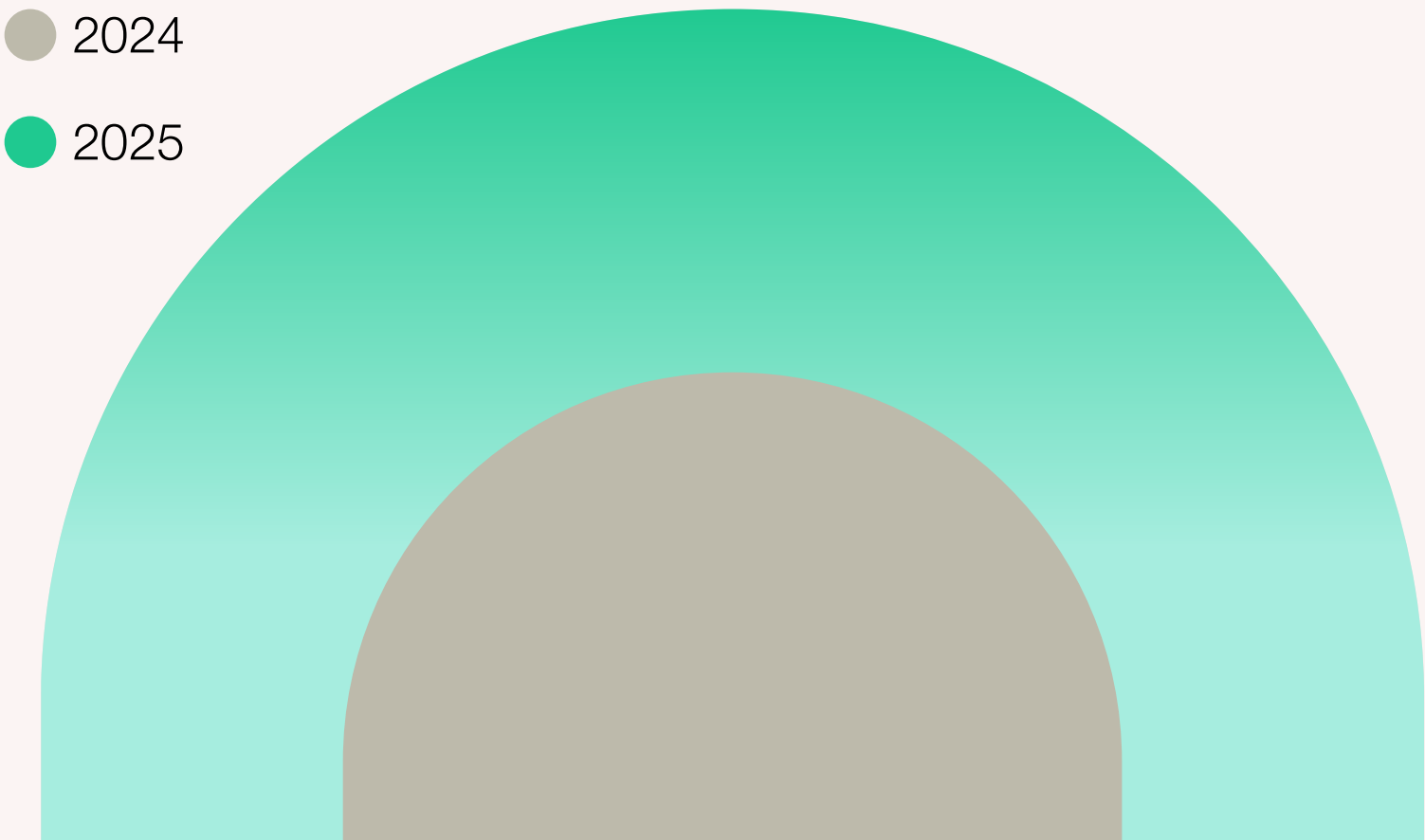
TOP HEALTH & PERSONAL CARE SEARCH TERMS:

- toothpaste
- deodorant
- hand sanitizer
- hand soap
- tampons



Apparel & Accessories

BTC shopping is as much about self-expression as it is preparation. Students are building wardrobes that reflect who they are and how they want to show up on campus, from first-day fits to game-day looks.



2x

YoY ROAS growth as students searched for campus staples and looks to show up in style¹

TOP A&A SEARCH TERMS:

- dress
- sandals
- socks
- shorts
- shoes

 A new semester often means a new sense of self, making apparel and accessories key self-expression purchases.



Food, Beverage & Snacks

Students are shopping for the snacks, drinks and simple meals to prep that keep pace with their busy school schedules and social lives.

● 2024
● 2025



72%

YoY increase in ROAS for food and beverage¹

TOP GROCERY SEARCH TERMS:

- coffee
- milk
- eggs
- water
- bread

TOP SNACKS SEARCH TERMS:

- snacks
- chips
- candy



Convenience fuels campus life, making food, beverage, and snack purchases an important part of their daily routines.



Dorm Décor & Tech

This is when the move-in checklist becomes reality. Students bring together décor, organization, and tech essentials to create a space that feels like their own and supports life on campus from day one.



89%

YoY increase in clicks during BTC with students searching for ways to personalize and power their spaces¹



3x

more Pinterest impressions in 2025 leading to more discovery with inspo-led planning¹

TOP HOME SEARCH TERMS:

🔍 shower curtain

🔍 hangers

🔍 basket / laundry basket

🔍 pillows

🔍 storage bins

🔍 bedding

TOP TECH SEARCH TERMS:

🔍 headphones

🔍 earbuds

🔍 laptop

🔍 batteries

🔍 tv



Case study



Roku

A+ entertainment strategy

Roku saw opportunity with Roundel to connect with students as they planned and personalized their dorm room setups. Through a full-funnel strategy spanning social, search, and Target app experiences, Roku stayed top of mind throughout the path to purchase.

TAKEAWAY

By showing up early in the journey, Roku stayed connected to the inspiration and consideration moments influencing dorm purchases, helping turn discovery into action.

SOLUTIONS

Display by Roundel™

Search Ads by Roundel™

Influencers by Roundel™

Social by Roundel™

PARTERSHIP RESULTS

2x

ROAS vs. category benchmark¹

3x

higher attributed sales from the Target app¹

School's out, shopping for college is on

Students are scrolling, saving and shopping their way toward move-in day, with discovery and purchase moments happening in waves.



MAY | Discovery and inspiration phases begin

Dorm aesthetics, wishlist building and creator-led browsing start gaining momentum.

Social by Roundel™ Influencers by Roundel™

JUNE-JULY | Planning drives cart building

Students begin shopping for décor, apparel, beauty and tech ahead of move-in season.

Display by Roundel™ Search Ads by Roundel™

LATE JULY-AUGUST | Move-in purchases peak

Students shift from inspiration to action for their everyday essentials, storage, snacks and more.

Target Product Ads by Roundel™ In-Store Activations

In-Store Service Hubs by Roundel™

SEPTEMBER | Last-minute finds and restocks continue

The “I forgot” and restock purchases keep momentum going after move-in day.

Target Product Ads by Roundel™ Search Ads by Roundel™

How to show up for the season



Show up before the shopping cart fills up

50% of guests plan to use social for their BTC journey. Show up early with social,² influencers, and full-funnel media strategies that connect discovery to purchase moments.



4 in 10 guests begin thinking about BTC shopping⁴ **at least a month in advance.**



Build creative around the college routine

97% of Gen Z³ shop in-store. Use an omnichannel approach to build creative that connects to their daily routines, from game-day prep to everyday essentials.



Make value part of the vibe

Students are actively comparing options for the best deal, with 77% planning to shop sales events.⁴ Reinforce value with clear pricing, promotions, and “save messaging”, especially during Target Circle™ Week.



Their next chapter. Your next **opportunity to connect.**

With Roundel's data-fueled solutions helping brands show up across every step of the journey, your brand can connect with students across touchpoints as they build routines, define their spaces, and create a life of their own on campus.

Sources:

1. Target Internal Data
2. Target Back to School Insights Report
3. ICSC Report
4. Target Holiday Survey