

Back-to-School 2026

Roundel™
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Back-to-school means balancing budgets and big lists

Families are balancing budgets, students are preparing for milestone moments, and teachers are investing in classrooms designed to help students succeed.

With first-party insights from Target guests, Roundel helps brands show up across every back-to-school (BTS) moment.

100M+

Target Circle™ members¹

50M+

weekly digital visitors¹

30M+

weekly in-store shoppers¹



Table of contents

Guest behavior	3
Solutions	6
Category & shopping insights	7
Key timing & recommendations	11

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

BTS —→ Back-to-school

Every cart tells a different story

Behind every back-to-school cart is a balance of student excitement, parent planning, and teacher preparation. Understanding how those motivations work together is key to understanding the season.

Students

BTS season is a chance for kids to express who they are, show up confidently, and feel like they belong. From first-day outfits to must-have supplies, kids are bringing their personalities to the cart.

57% of parents can be persuaded to splurge on a first-day outfit, driven by their child's desire for self-expression and excitement.²

Parents

For parents, BTS shopping is both practical and emotional. It's an opportunity to spend one-on-one time with their kids before busy routines return, while helping them feel prepared for the year ahead.

72% of parents view back-to-school shopping as a time to bond with their children.³

Teachers

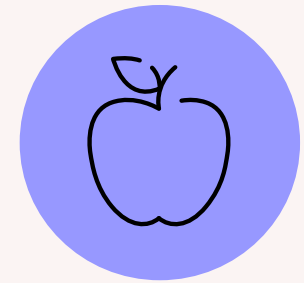
Teachers are focused on creating classrooms where everyone can succeed. Even with budgets top of mind, many are willing to invest their own money to ensure students are set up for success from day one.

81% of educators purchase supplies so every student has equal access to necessary materials.⁴



One of the year's biggest spending moments

Families and teachers are navigating significant seasonal expenses, making value, planning, and classroom readiness central to every purchase.



\$85.4B

projected 2026 back-to-school retail spending⁵



51%

of parents are shopping earlier due to concerns about rising prices⁶

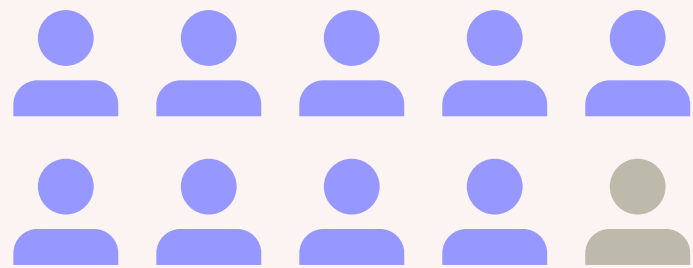




Social is shaping the list

Through social browsing and creator inspiration, parents and students are discovering the products and must-haves they feel most confident adding to their school shopping lists.

50% expect to **use social media** during their shopping journey⁷



9 in 10 children have a **must-have back-to-school item**⁷



Technology is simplifying the journey

Everyone is shopping smarter to make a stressful season easier. With balancing busy schedules, long supply lists, and multiple shopping trips at once, there's greater demand for a more connected shopping experience across digital and in-store channels.

70% of parents are open to **using AI to simplify shopping**³

 DISCOVERY IS EVOLVING

ChatGPT traffic to Target is up **40% MoM**, with Roundel's pilot putting brands directly into AI-driven discovery moments.³

Check off the list on every channel

From first searches to final stock-up trips, Roundel’s omni-channel solutions help your brand stay connected to guests.

Discovery

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

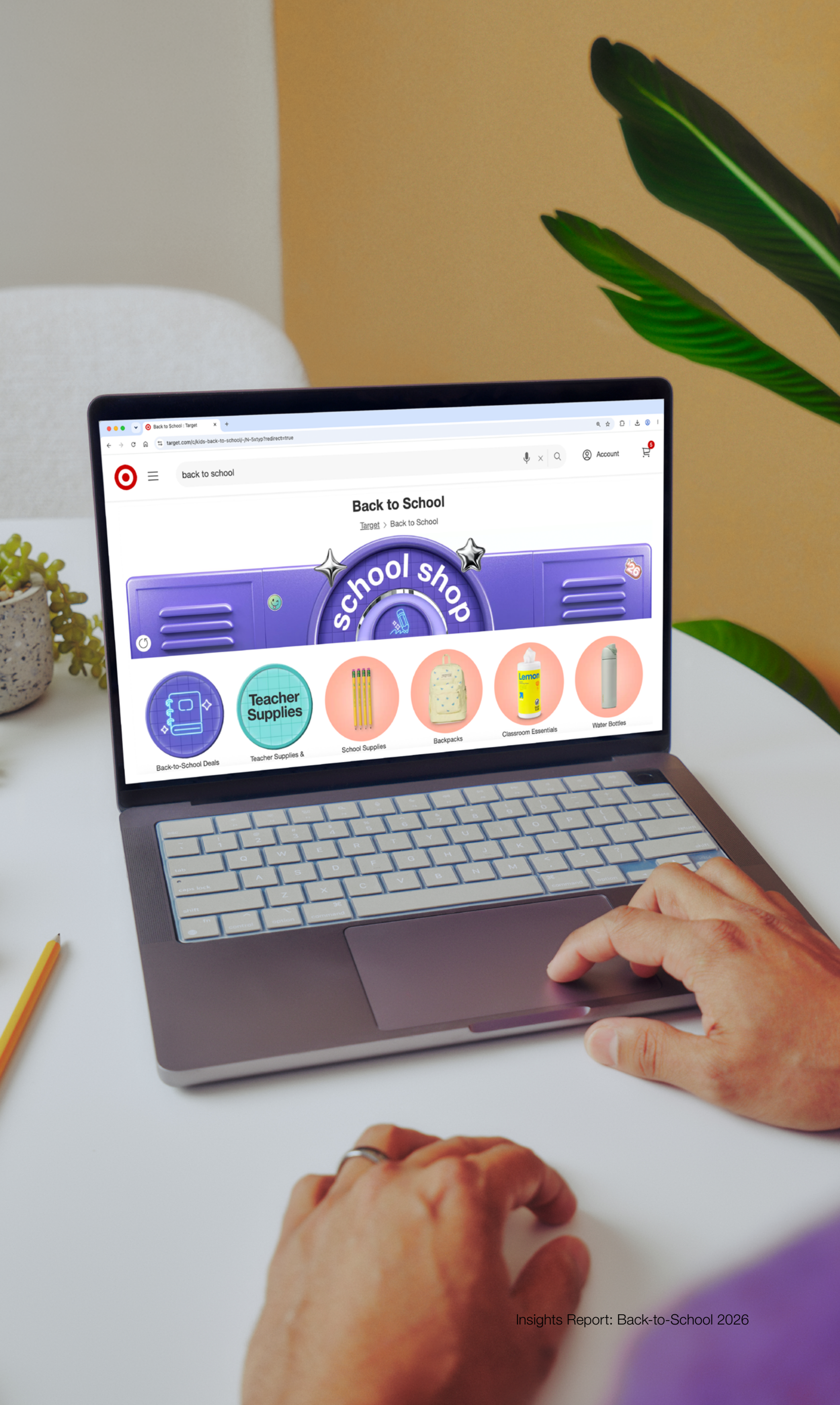
Reduce friction throughout the journey, moving guests seamlessly from discovery to purchase.

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

Value Seeking

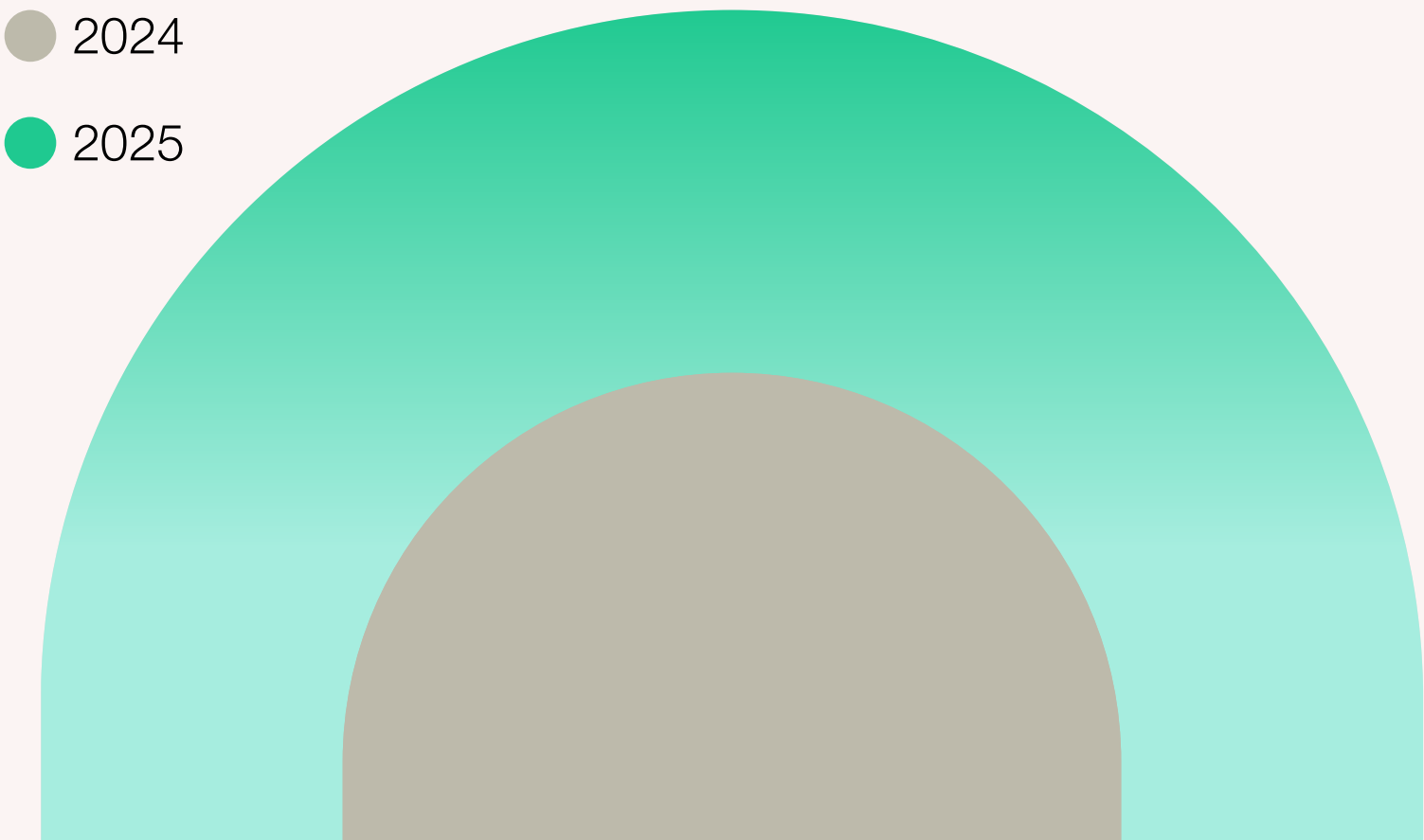
Build confidence in purchase decisions by reinforcing value when it matters most.

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



Apparel & Accessories

New shoes. Fresh backpacks. Outfits picked out weeks in advance. BTS shopping is as much about first impressions as it is classroom essentials, making apparel an early-season driver of more discovery and purchase decisions.



2x

increase YoY in ROAS for Apparel Search as students and parents searched for confident styles¹

TOP A&A SEARCH TERMS:

- dress

sandals

socks

shoes

shorts

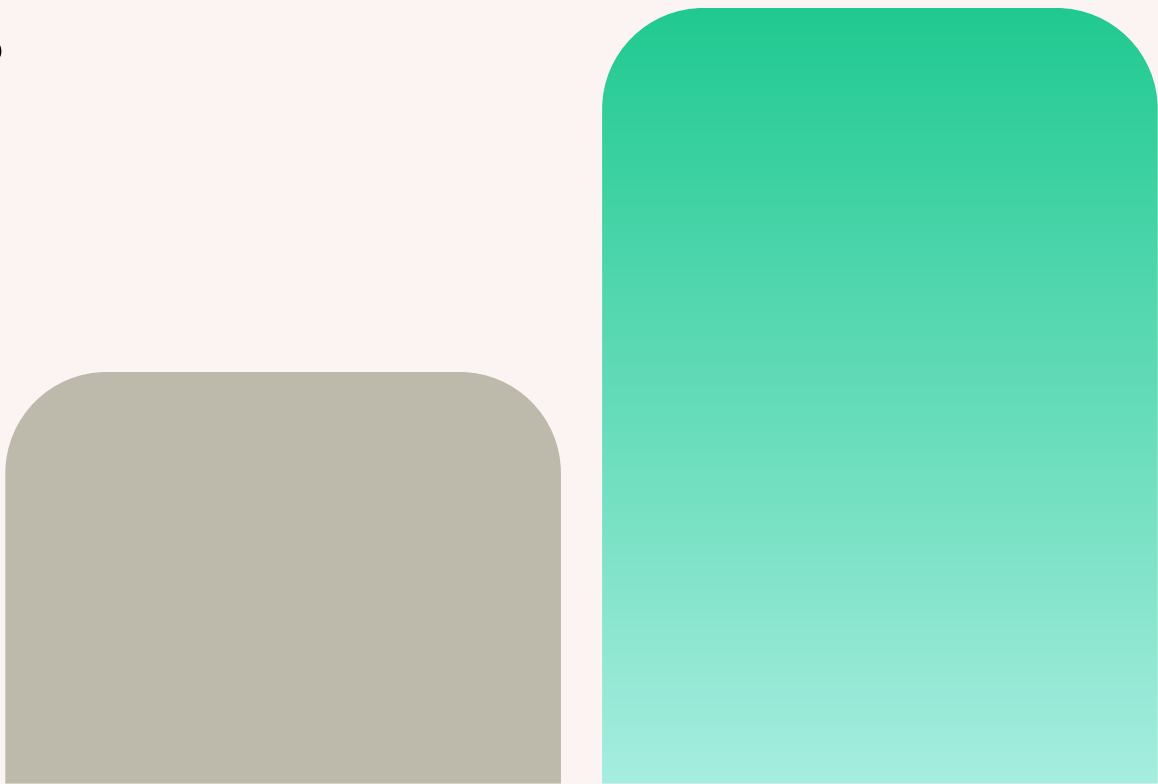
First impressions start before the first bell, making apparel one of the season's earliest purchase drivers.



Home, Essentials & Tech

While teachers are refreshing classrooms, parents are busy organizing homework spaces, upgrading tech, and stocking up on everyday essentials.

● 2024
● 2025



89%

YoY increase in home category clicks during back-to-school, signaling stronger engagement¹

TOP HOME & ESSENTIALS SEARCH TERMS:

- lunch box
- storage bins
- sanitizer
- hand soap

TOP TECH SEARCH TERMS:

- headphones
- TV
- earbuds
- laptop



Back-to-school doesn't stop at backpacks. This is a time for a whole-home reset.

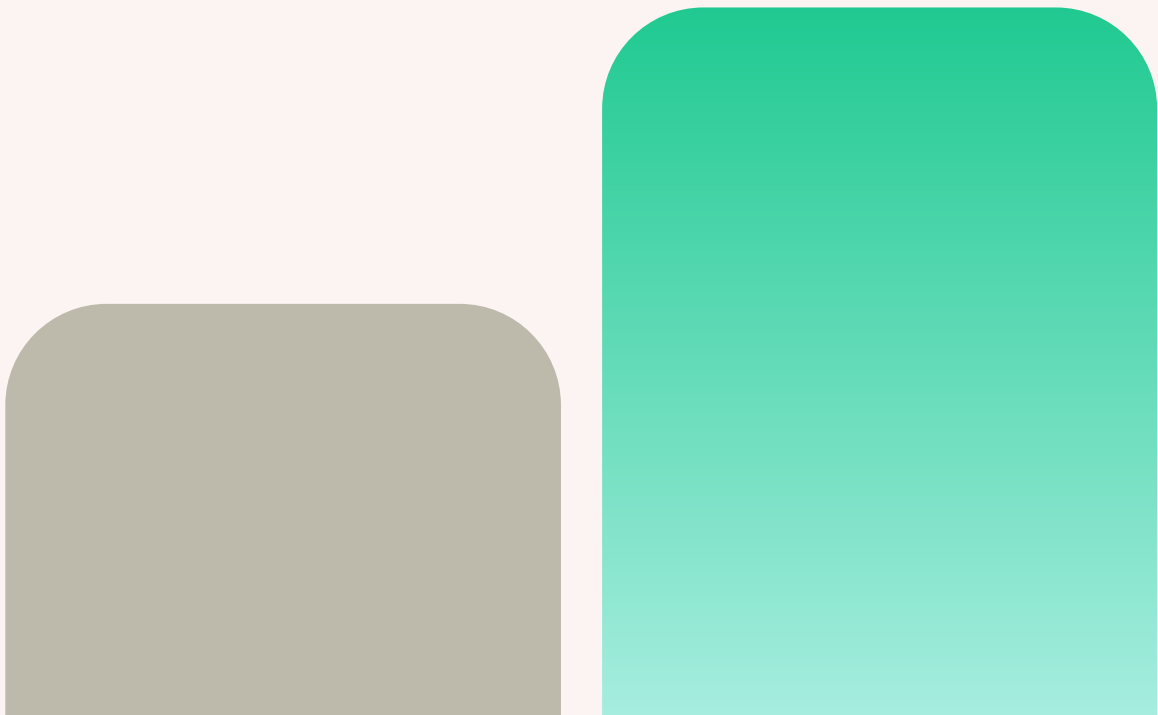


Food, Beverage & Snacks

Healthy snacks and grab-and-go essentials make hectic mornings, weeknight dinners, and after-school activities easier for busy families.

2024

2025



72%

YoY increase in total campaign ROAS as snack runs are BTS staples¹

TOP GROCERY SEARCH TERMS:

- milk
- eggs
- yogurt
- bread
- bananas

TOP SNACKS AND BEVERAGE SEARCH TERMS:

- water
- chips
- popcorn
- snacks
- candy



Busy school days make convenient food and snack solutions part of everyday routines, not just one-time purchase lists.



Case study



Packing a better BTS for parents

General Mills recognized the opportunity to connect with parents at every stage of the BTS journey. With Roundel, they delivered a full-funnel campaign designed to reach guests across their path to purchase.

TAKEAWAY

By meeting parents in the moments shaping their purchase decisions, from digital discovery to in-store sampling, General Mills’ strategy turned inspiration into action and drove sales across their categories.

SOLUTIONS

- Display by Roundel™
- Search Ads by Roundel™
- In-Store Activations

PARTERSHIP RESULTS

\$11+
ROAS from digital campaign¹

19%
new guest acquisition for General Mills portfolio¹

The back-to-school rush builds all summer long

Parents and teachers begin planning, budgeting, and building shopping lists way before school is in session. Here’s how shopping behaviors shift as we get closer to the first day of school.



MAY-JUNE | Planning and list-building begin

Parents start budgeting while teachers begin preparing classrooms for the year ahead.

Social by Roundel™

Influencers by Roundel™

JULY | Shopping momentum builds

Comparing options and weighing budgets for stocking supplies, apparel and lunchbox essentials.

84% of guests say they had half their list left to buy as of July⁷

Display by Roundel™

Search Ads by Roundel™

AUGUST | Peak purchase season

BTS shopping accelerates as the first day nears.

Target Product Ads by Roundel™

In-Store Activations

In-Store Service Hubs by Roundel™

SEPTEMBER | Last-minute purchases continue

Families and teachers continue to pick up final classroom needs.

Target Product Ads by Roundel™

Search Ads by Roundel™

How to show up for the season



Get on the list early

Show up before guests' supply lists turn into stock-up trip with Social by Roundel™, Influencers by Roundel™ and full-funnel media strategies designed to drive discovery early in the season.



Turn guests' routines into relatable creative

Pair creative storytelling with Roundel's suite of solutions, connecting to the routines shaping the season for families and teachers, from packing lunch to classroom cleaning essentials.



Make value part of the vibe

Guests are shopping more intentionally than ever, making "save" messaging, Target Circle™ Week deals and value-led creative especially important throughout the season.



4 in 10 guests are making **more cost-conscious** choices.⁷

Class dismissed! **Time to turn discovery into a spot in the cart.**

→ Brands who show up early are the ones that make the list. Roundel helps you connect with families and teachers in key moments to drive impact throughout the BTS journey.

Sources:

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|---|--|
| 1. Target Internal Data 2026 | 5. eMarketer Back to School Forecast 2026 |
| 2. Deloitte Back-to-School Survey | 6. eMarketer FAQ on Back-to-School Marketing |
| 3. Mintel US back-to-school Report 2026 | 7. Target Holiday Survey 2026 |
| 4. Adopt a Classroom Teacher Survey | |