



Consumer pulse survey

Back-to-school 2025



Executive summary

KPMG surveyed ~2,000 consumers across the United States to understand back-to-school (BTS) and fall spending trends

Household financial trends are mixed



- Among all respondents, 39% reported a worse financial situation this year—while 29% said it was better
- However, among BTS shoppers, 39% said their financial situation is better while 34% said worse
- Younger demographics, who are more likely to have children, report better financial situations than older demographics

Spending is up—but mainly for essentials



- Overall fall spending is expected to rise across essential categories—led by year-over-year increases in groceries (+25%) and gas & car maintenance (+11%)
- However, discretionary categories see decreases—especially in sporting goods (-14%) and toys (-17%)

Anticipated BTS spending rises amid higher costs



- BTS spending is expected to rise 10% year-over-year
- Among BTS shoppers spending more, 74% say its due to higher prices
- 75% say tariffs will drive higher prices
- Core school supplies, apparel, and footwear comprise nearly half of school spending
- Over the past two years, online BTS spending has increased from 39% to 45%

Sports, beauty, and tech trends

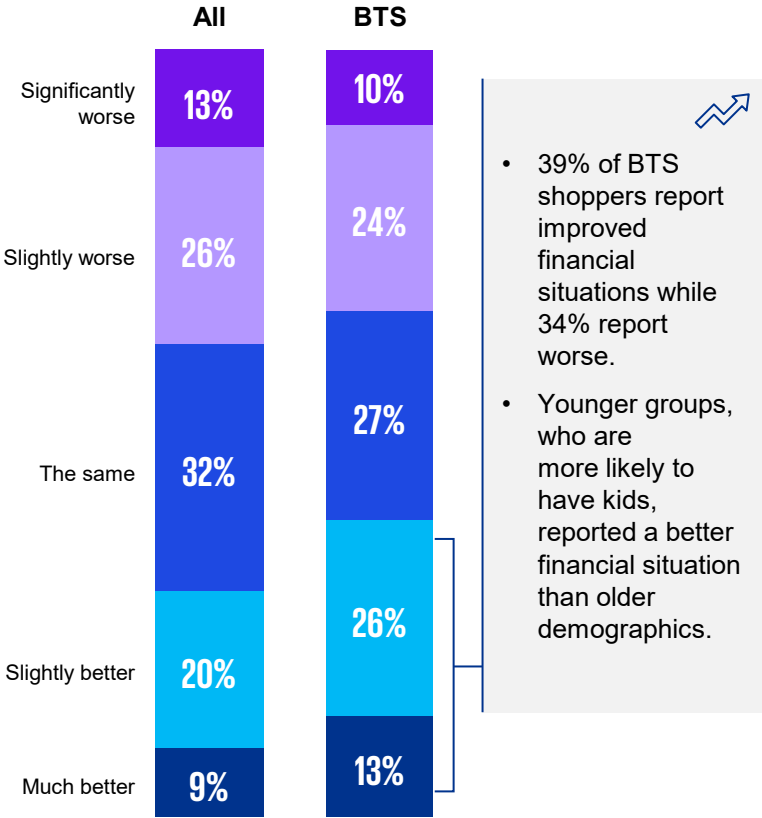


- Outdoor sports are the top school activity—followed by music and indoor sports—which will influence apparel spending, such as uniforms
- 66% say teen beauty purchases are primarily influenced by peers and friends—exceeding the influence of social media and advertising
- 57% say GenAI is used extensively or moderately in their child's education

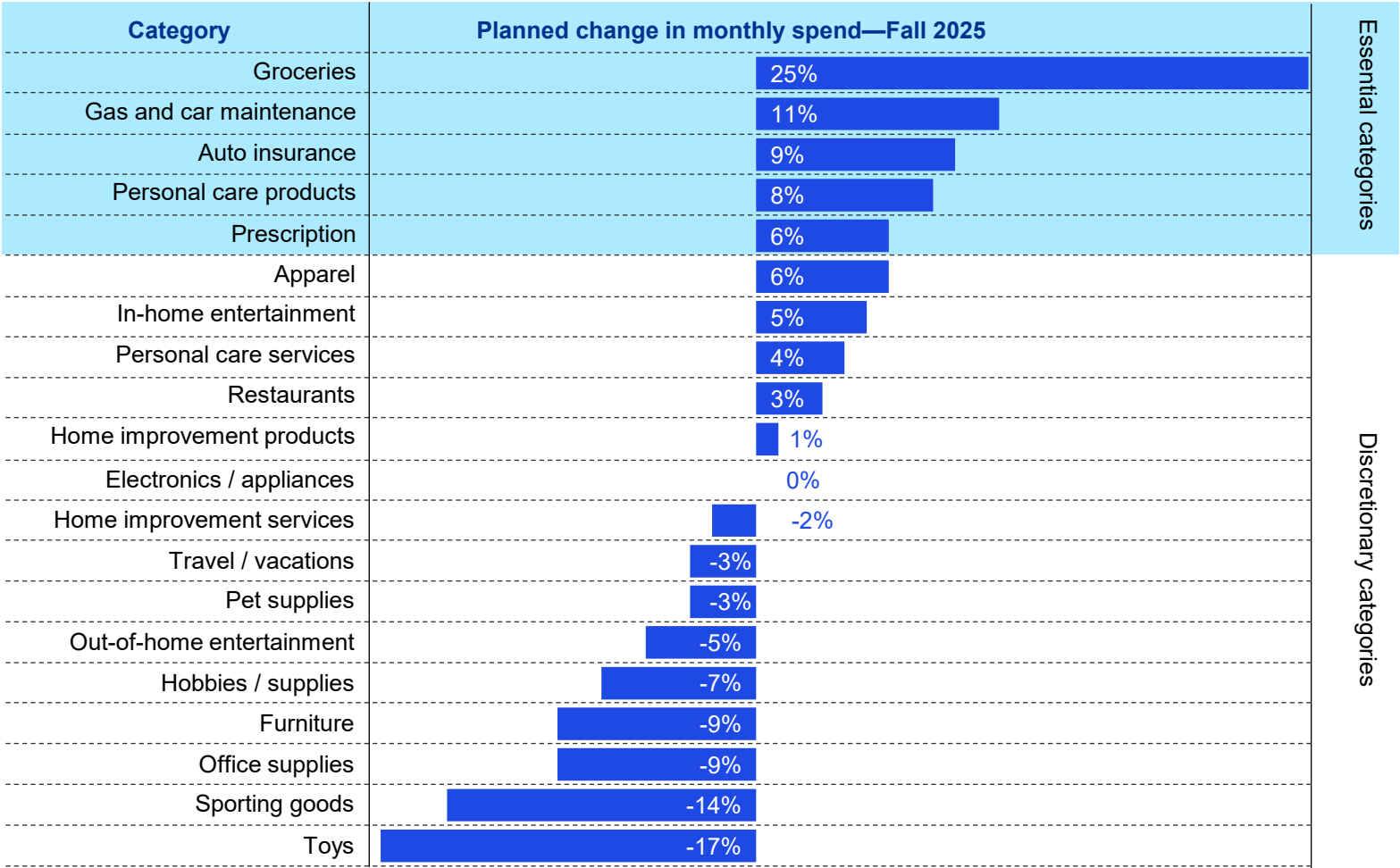
Household financial situation and fall spending trends

Household financial outlooks are mixed

39% of all respondents said their financial situation got worse this year and 29% said better—but BTS shoppers are more optimistic

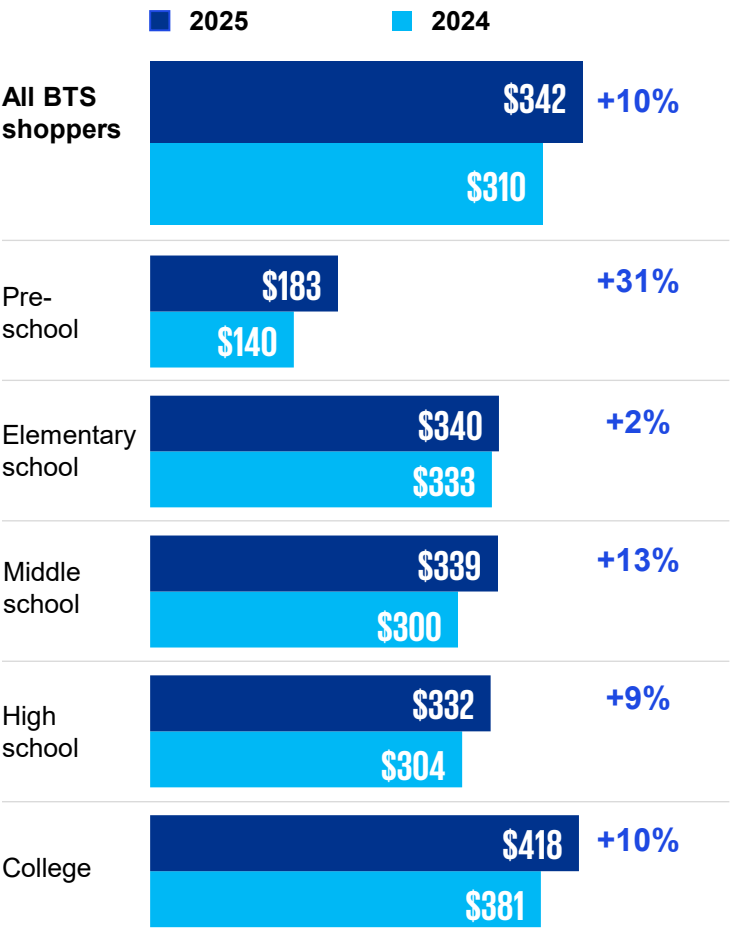


Consumers are prioritizing—with spending up in essential categories and down in others

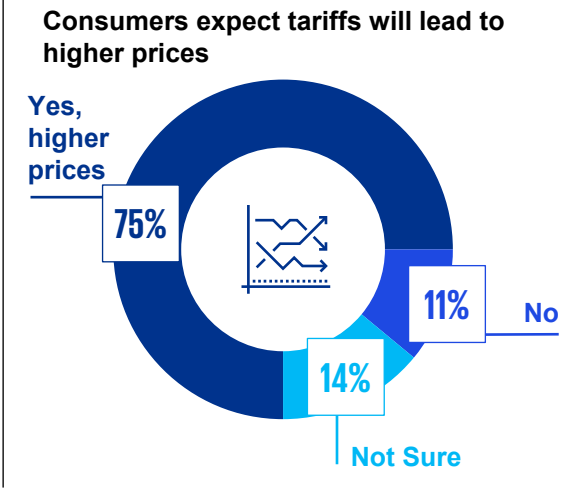
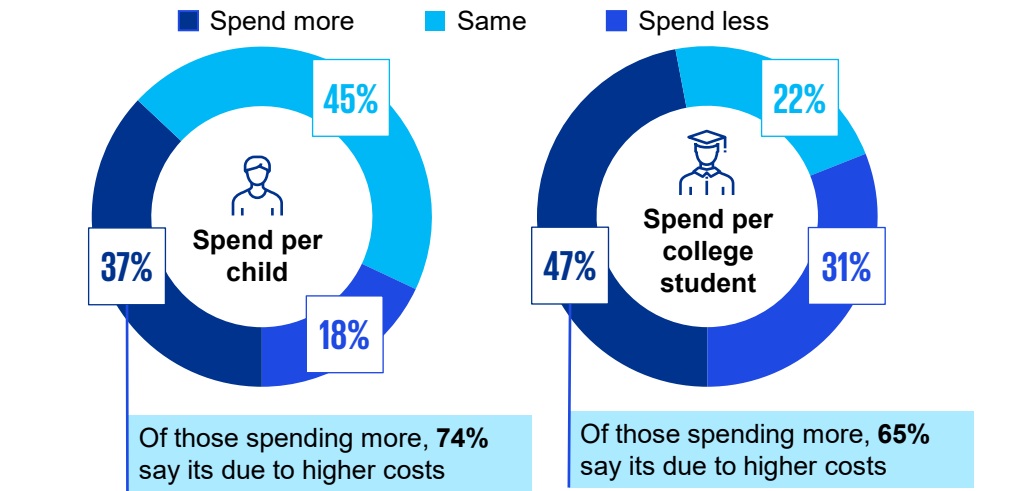


BTS spending rises—but mostly to cover higher costs

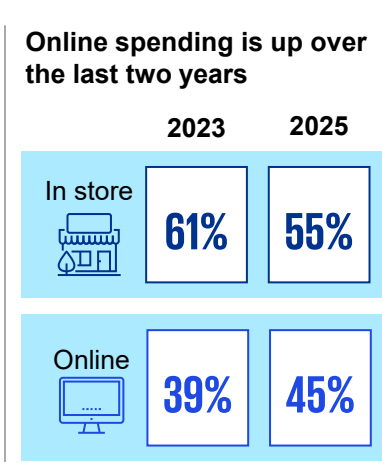
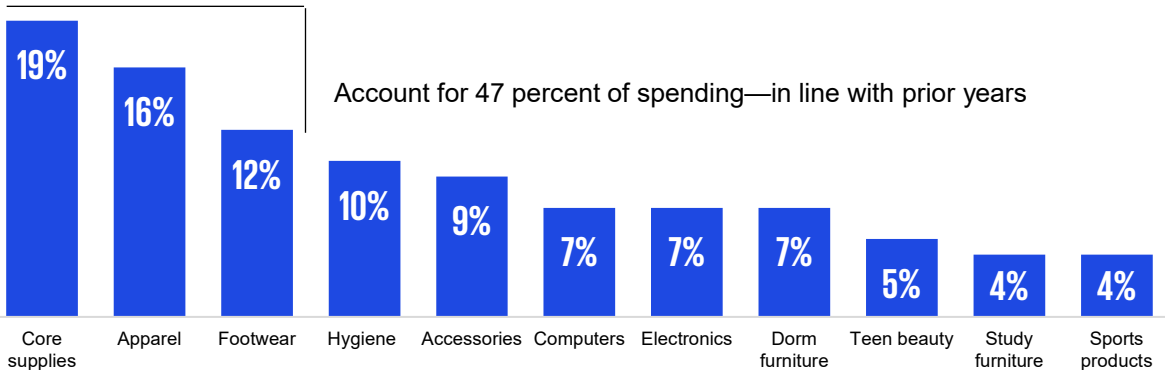
BTS spending up 10% year-over-year



Higher spending is mainly driven by expectations of higher costs



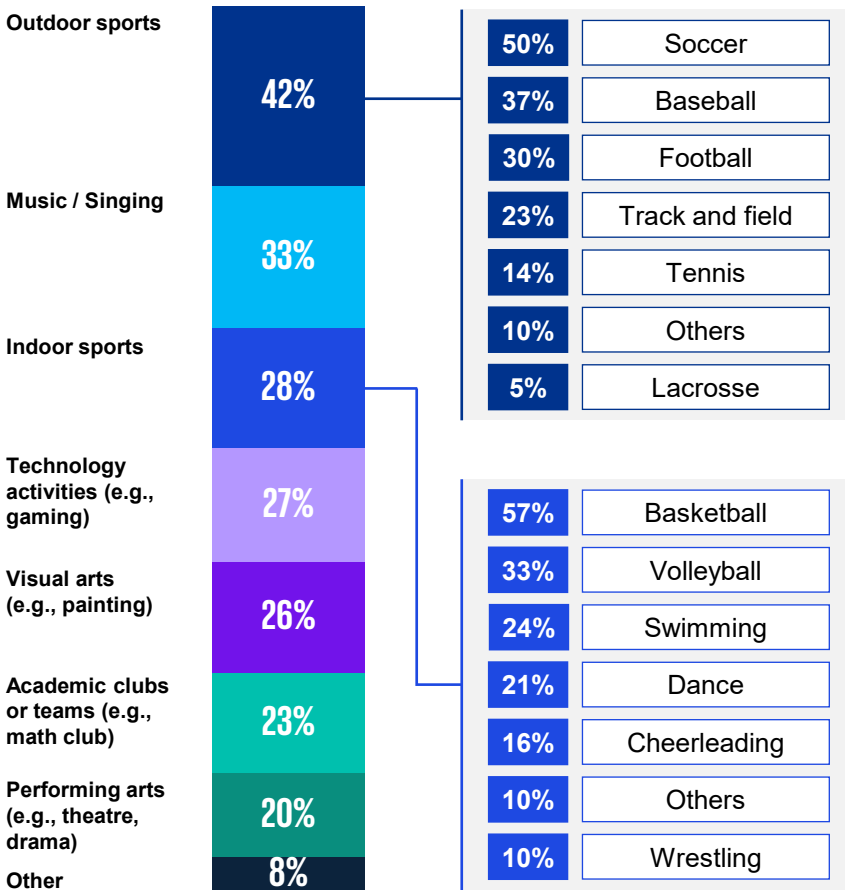
Core supplies, apparel, and footwear comprise nearly half of BTS spending



Sports, beauty, and technology trends

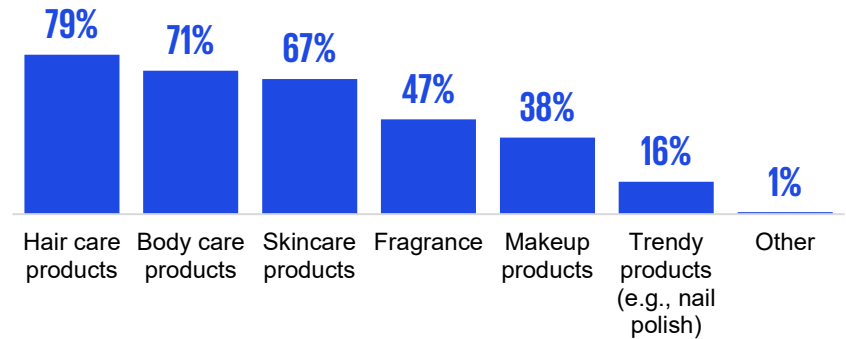
Top activities for children: Outdoor sports and music

Sports and other activities will require purchases of uniforms and accessories

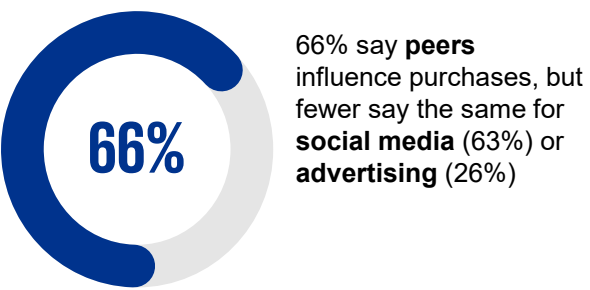


Teen beauty purchases focus on hair and body care products

Hair care products are the top purchase in teen beauty

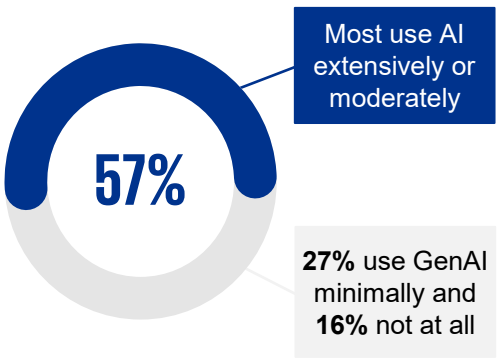


Peer recommendations have the most influence on teen product choices

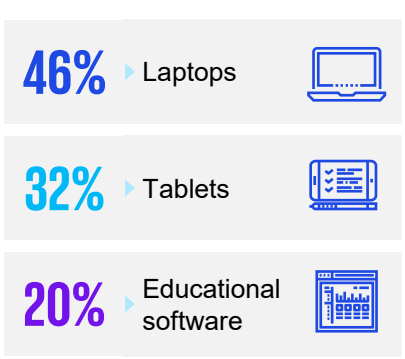


Child technology use shows widespread adoption of GenAI

AI / GenAI widely used in children's learning



Laptops are the primary BTS technology purchase



Online retailers are the primary channel for tech purchases





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