



Back-to-School US Consumer Behaviors

July 2026



Verve's Insights: Back to School 2026 Key Findings

01

Parents ask AI about readiness but search for safety and savings

Safety and academic readiness lead family concerns when using AI for support, while traditional search is more heavily focused on safety and cost. Academic readiness under-indexes in search, suggesting families turn to AI for broader advice.

02

Back-to-school spending is shifting from supplies to style

Clothing is the fastest-growing purchase category for both K–12 and college shoppers, while school supplies and books decline. Back-to-school is increasingly shaped by identity, campus life and the wider student experience.

03

Amazon dominates back-to-school retailer attention

Amazon accounts for nearly two-thirds of named-retailer searches, almost four times Walmart's share and roughly seven times Target's. Challenger retailers have a stronger opportunity to compete through category expertise.

04

AI remains ed-tech's growth engine, but interest is narrowing

AI for education continues to lead ed-tech growth, even as online learning programs and digital literacy lose momentum. Consumers appear to be moving beyond broad experimentation and toward practical AI tools.

05

Career-focused education paths are gaining momentum

Search interest in trade schools and professional learning is rising sharply, while graduate and online learning decline. The shift points to growing demand for faster, skills-based routes that connect education to employment.



Safety & Savings: AI Conversations vs. Immediate Search Needs



AI Conversations

Dominated by Safety and Academic Readiness concerns.



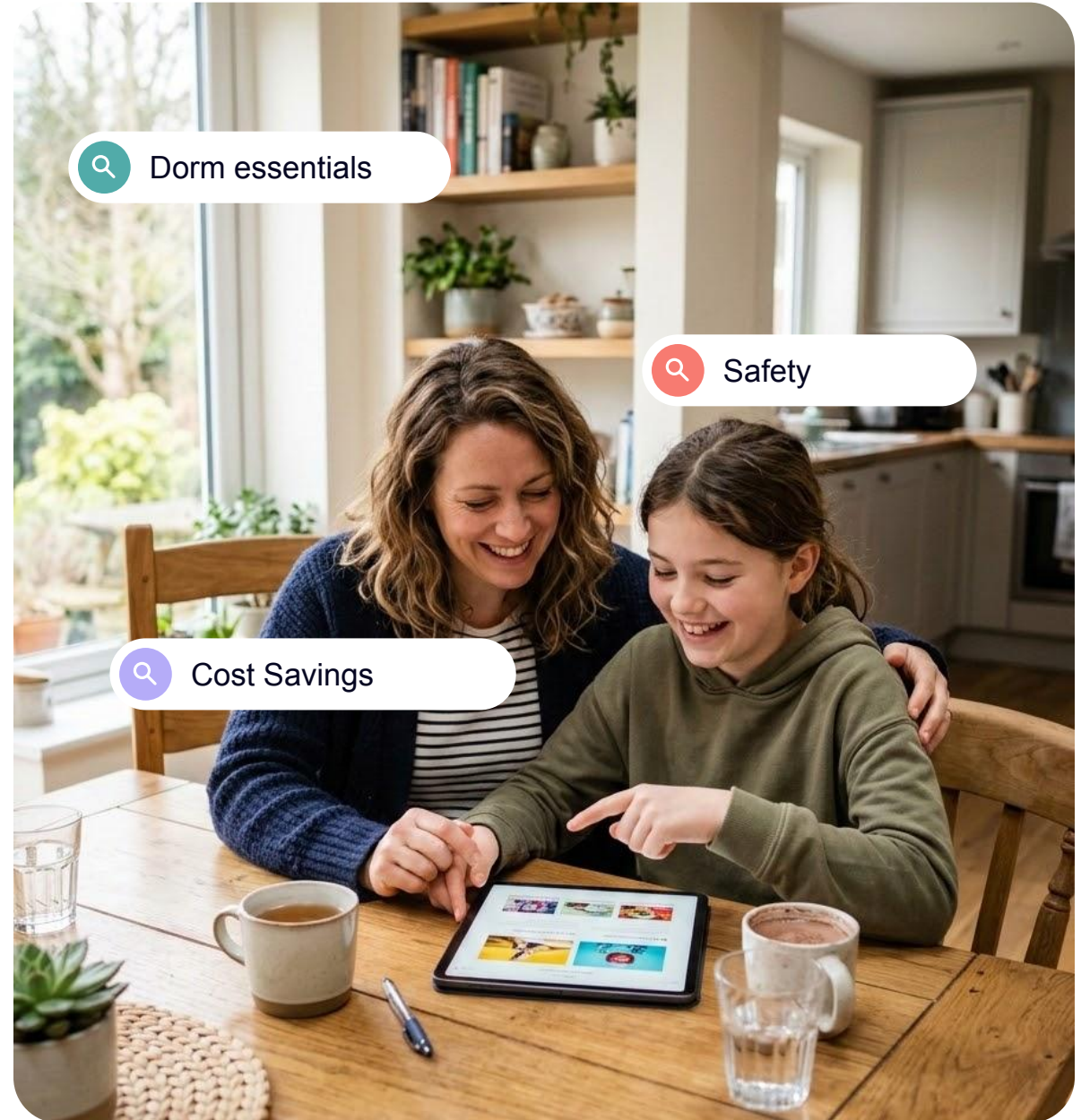
Web Search

Driven strongly by Safety and Cost.



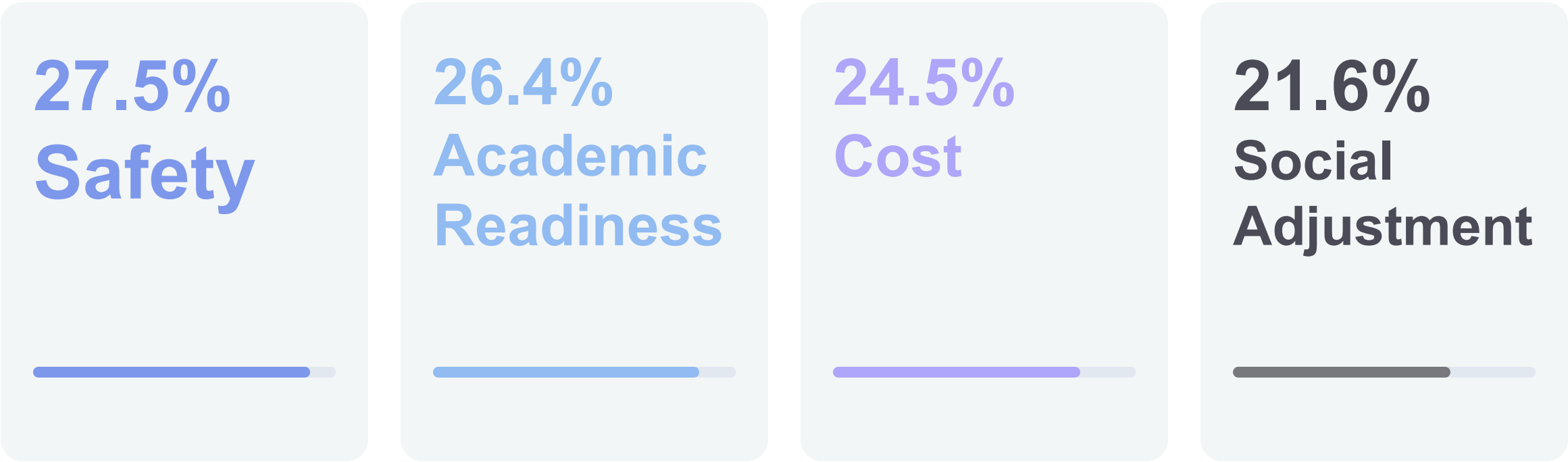
Key Takeaway

Families use AI for broad academic guidance, but rely on traditional search for immediate, cost-saving solutions.



Families' AI Concerns For Students

What Families Are Asking AI About Their Students



Share of AI conversations mentioning back-to-school concerns

Time Period: May 01 – July 15, 2026



Family Online Search Concerns

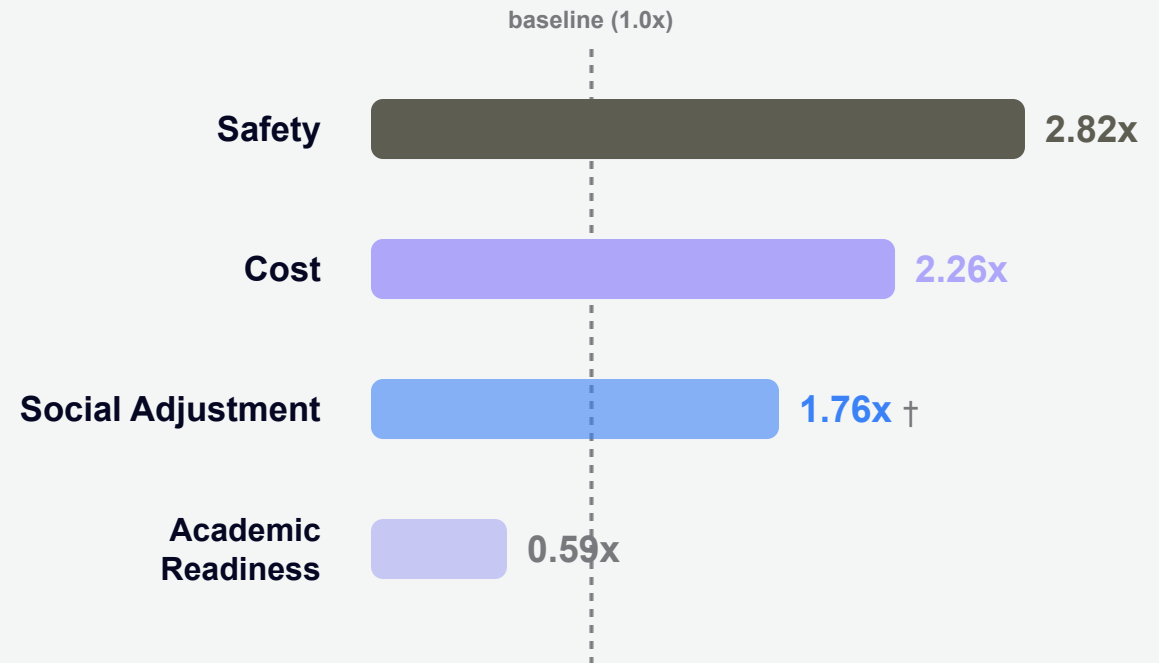
For Students

This index reveals how much more or less likely families are to search for key back-to-school concerns compared with the average searcher.

Time Period: May 01 – July 15, 2026

Search Over-Index of Family Searchers vs. Average

Index = 1.0 represents the average US searcher baseline



† limited sample — directional

Source: Verve



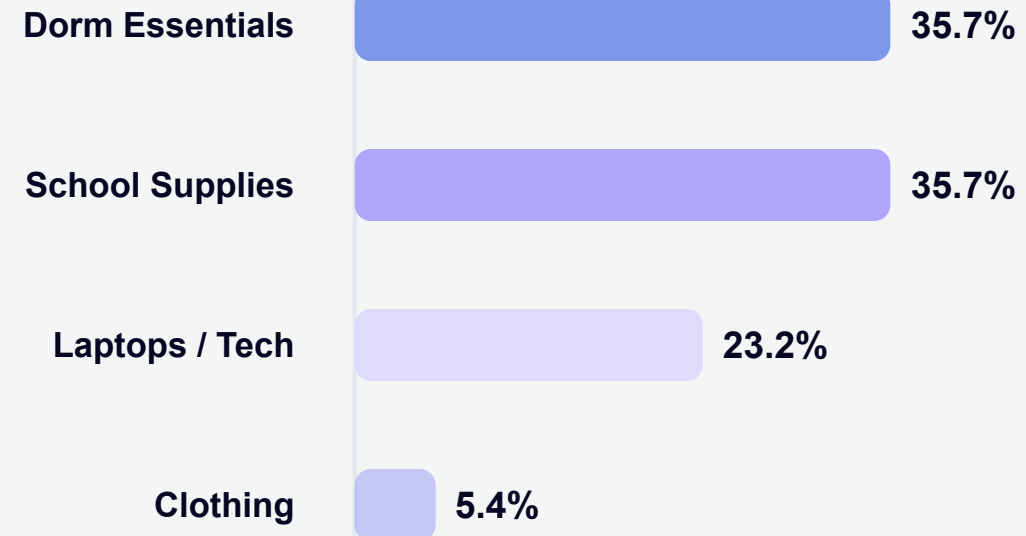
Source: Verve

AI-Assisted Back-to-school Planning Focuses on Essentials.

Share of product-category mentions across
back-to-school AI conversations.

AI conversations by category

Share of category mentions across back-to-school AI conversations



Back-to-School Signals: June – mid-July 2026 | Source: Verve



Retailer Attention: Amazon's Dominance and Challenger Opportunities

Amazon's Lead: Captures nearly two-thirds of named-retailer back-to-school searches.

Competitor Gap: Amazon has almost 4x Walmart's share and 7x Target's.

Challenger Strategy: Compete through exclusive products and differentiated value, not broad messaging.



Back-to-school Search Intent by Category

Varying Windows of Intent

2025 search trends reveal that the window of intent varies significantly across back-to-school categories, ranging from as few as 5 weeks to as many as 18.

Longest Runway for Tech & Food

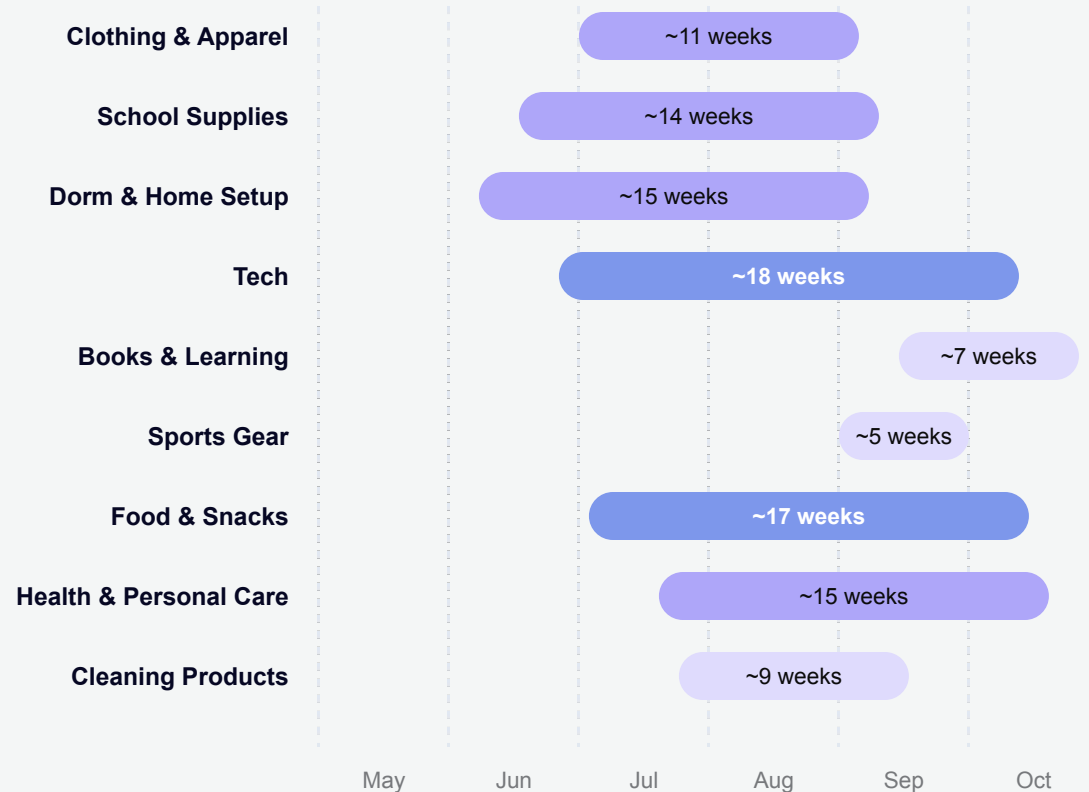
Categories like Tech and Food & Snacks command the longest runway, driven by needs that extend well beyond the initial back-to-school period.

Early Demand in Apparel

Clothing & Apparel, by contrast, signals strong early demand as students refresh their wardrobe before the semester begins.

Active Search Intent Windows

Average duration and timing of search runway by product category



Back-to-school Brand Strength by Search Intent

Search intent reveals how back-to-school brands perform across key product categories—highlighting critical competitive advantages.

Key Strength Leaders:

Target dominates Clothing and School Supplies. Best Buy leads in Tech, while Costco secures Grocery dominance. Walmart leads in Dorm Supplies.

Brand Strength Heatmap

Ranked performance by category search volume (1 is strongest)

	TECH	CLOTHING & APPAREL	SCHOOL SUPPLIES	DORM SUPPLIES	GROCERY & BULK
TARGET	4	1	1	3	4
BEST BUY	1	5	5	5	5
COSTCO	5	4	4	4	1
WALMART	3	2	2	1	2
AMAZON	2	3	3	2	3

Back-to-School Signals: June – mid-July 2026 | Source: Verve

Future of Education: AI Normalization and Vocational Momentum

Vocational Surge: Trade School (+49% YoY) and Professional Learning (+47% YoY) lead post-secondary growth.

Ed-Tech: AI for Education grows (+21% YoY), but overall market consolidates.

Key Takeaway: Consumers prioritize fast, skills-based routes and practical AI tools.

YoY Growth by Educational Sector

Comparing vocational surge vs. AI educational tools

Trade School

+49% YoY



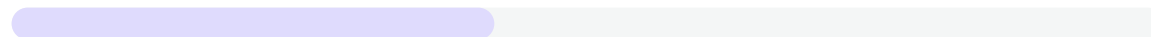
Professional Learning

+47% YoY



AI for Education

+21% YoY

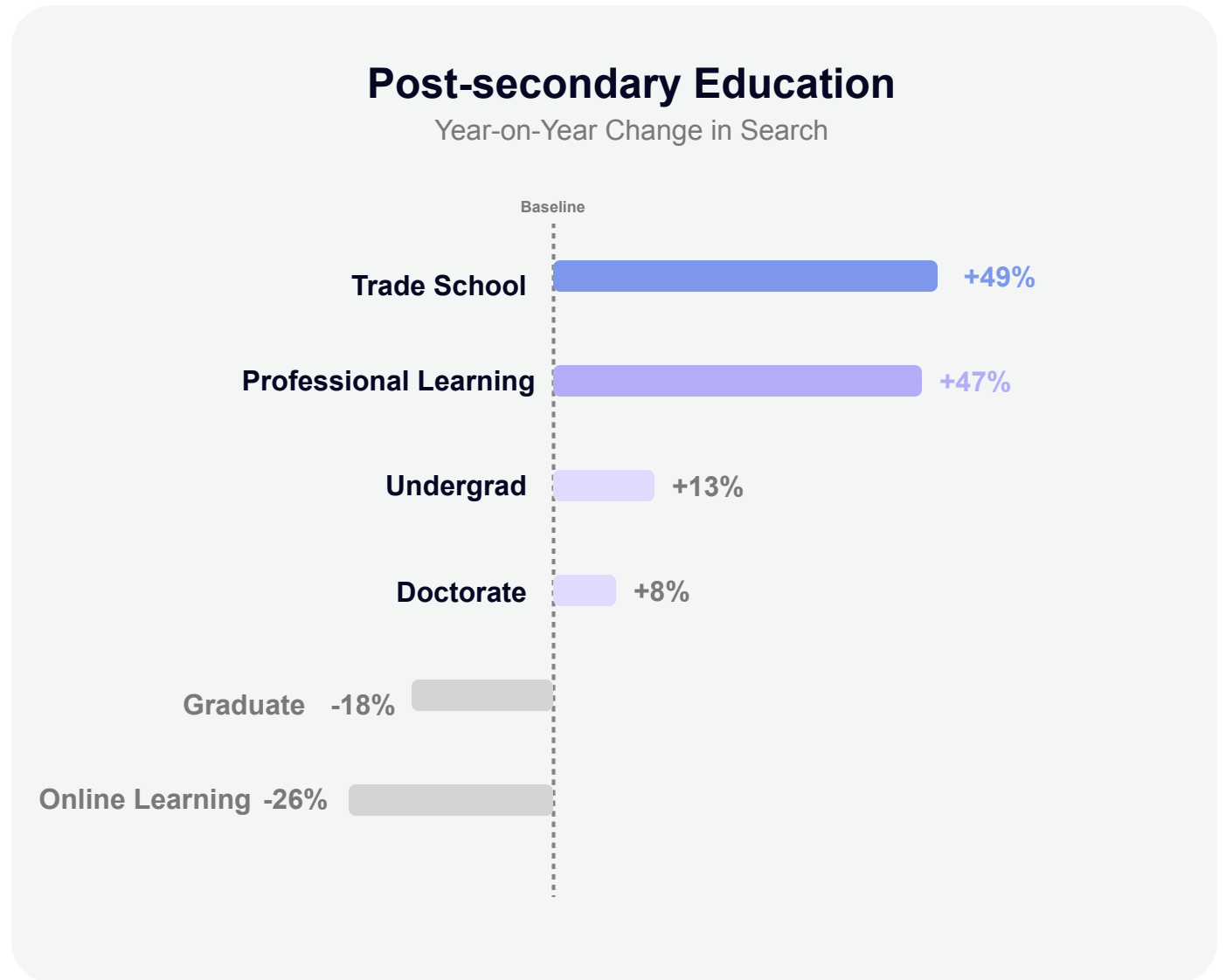


Back-to-School Signals: June – mid-July 2026 | Source: Verve

Post-secondary Demand Rotates Toward Vocational and Professional Paths

Trade School and Professional Learning are surging while Graduate and Online Learning search retreats — signaling consumers are prioritizing faster, career-oriented routes alongside traditional degrees.

Vocational surge is led by Trade School (+49% YoY) and Professional Learning (+47% YoY).



AI still leads Ed-Tech, but the surge is cooling

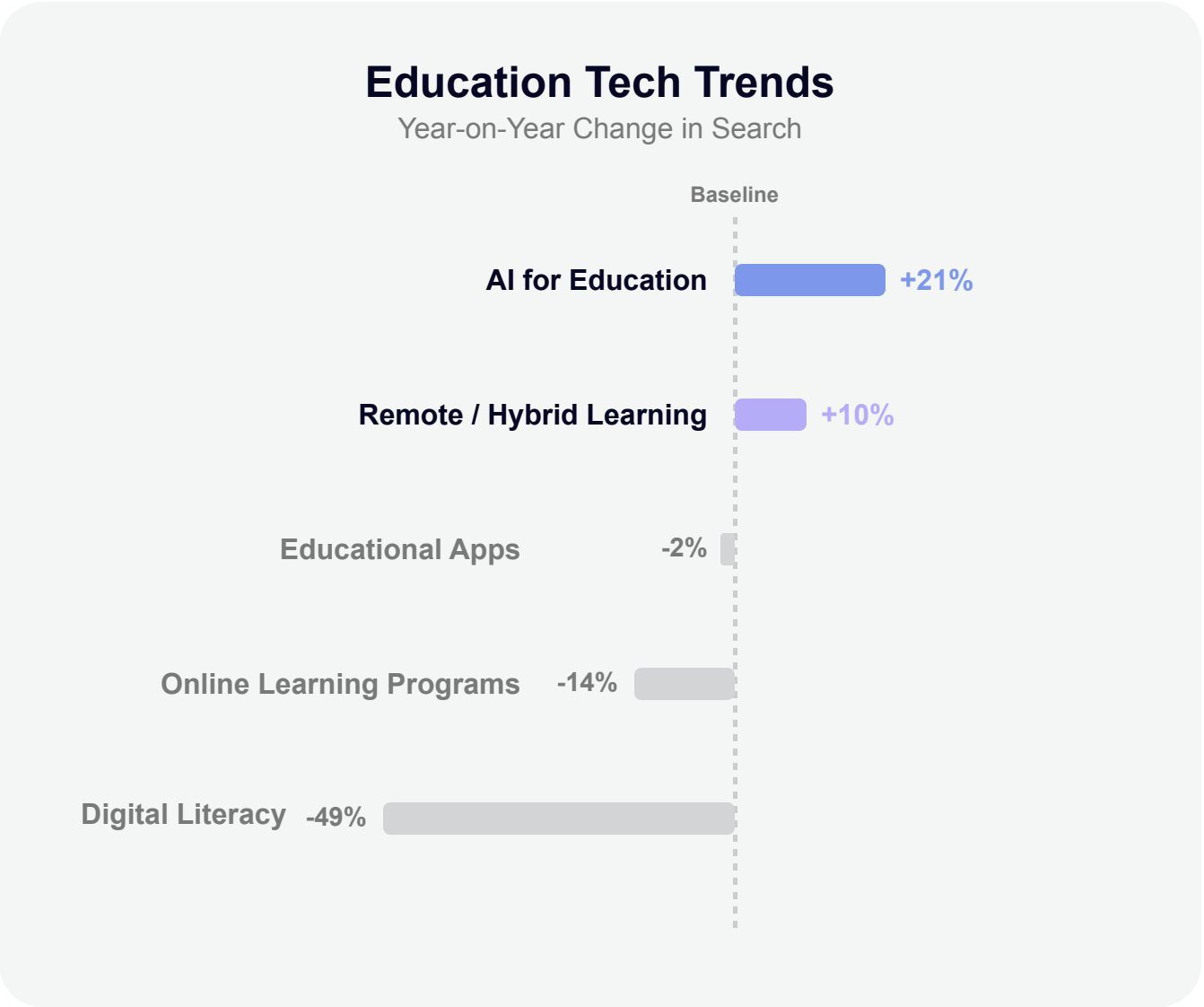
AI remains the category’s growth engine, but its expansion is normalizing. The rest of ed-tech search is flat to sharply down as the market consolidates around proven use cases.

AI-Powered Learning

+21% YoY growth in demand

Remote & Hybrid Learning

+10% YoY growth in demand



Style Over Supplies: The Lifestyle-Oriented Spending Shift

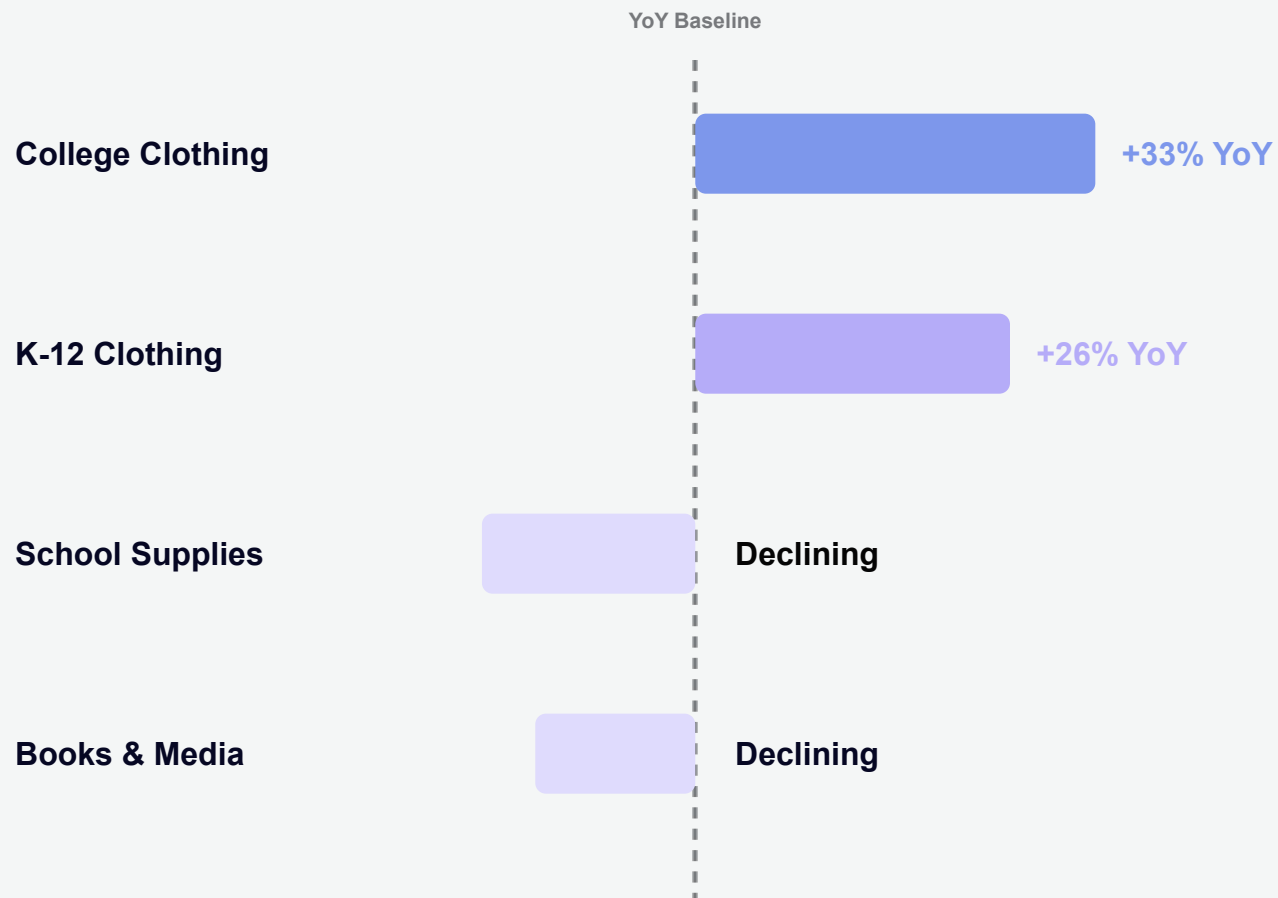
Key Takeaway: Back-to-school spending now prioritizes identity, style, and campus life over basic academic necessities.

Key Highlights:

- **Clothing Growth:** +26% YoY for K-12; +33% YoY for College.
- **Declining Categories:** School supplies and books are losing search momentum.

Back-to-School Search Momentum

YoY search activity growth vs. declining categories

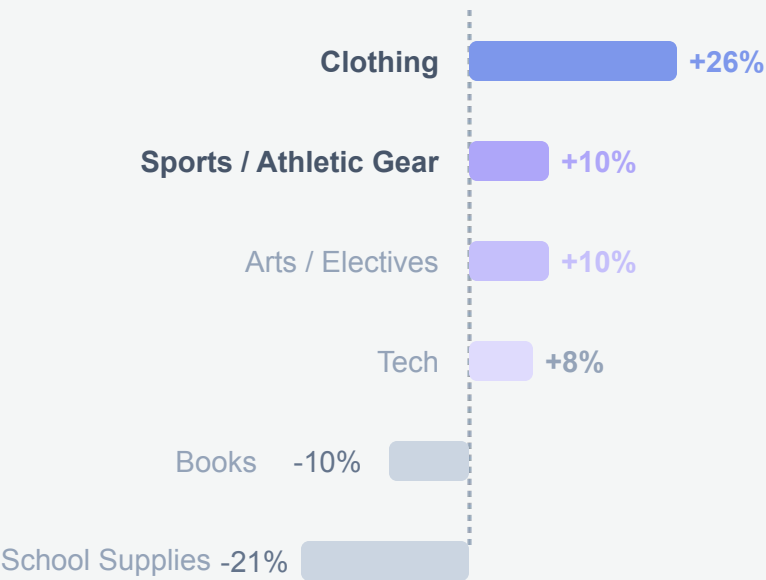


Lifestyle & enrichment drive K-12 education priorities

K-12 students and parents prioritize lifestyle-driven purchases like **Clothing** and **Athletic Gear**, while valuing **Family Involvement** and **Extracurricular Enrichment** over traditional academic metrics.

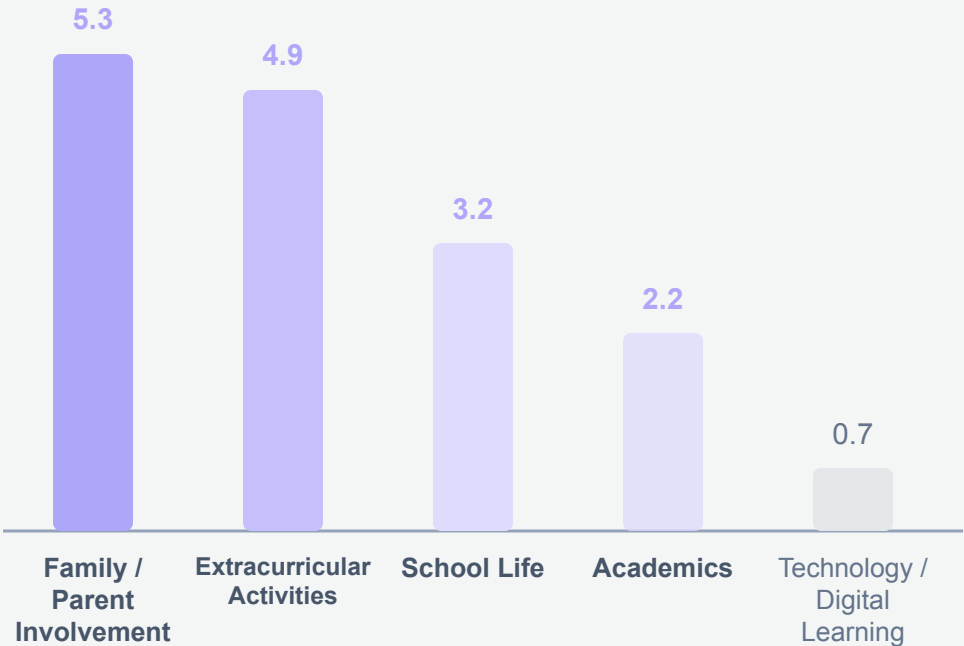
Back-to-School Products K-12

Year-on-Year Change in Search



Student Considerations K-12

Attributes & Priorities



K-12 Audiences

Key audience segments and trending search intent multipliers



Back-to-School Refreshers

- Back to School **2.17x**
- Children's Apparel **2.11x**
- Family Shopper **1.43x**



After-School Sports

- Cheerleading **2.07x**
- Gymnastics **1.58x**
- Sporting Gear **1.52x**



Tech-Enabled Families

- Smart Home **1.83x**
- Wearables **1.80x**
- Smart Phones **1.53x**



Learning Enablement

- Science **1.32x**
- Brain Teasers **1.23x**
- Children's Lit. **1.19x**



Budget-Conscious Parents

- Wholesalers **2.34x**
- Family Shopper **1.43x**
- Vouchers & Disc. **1.36x**



Daily Family Readiness

- Childcare Services **1.82x**
- Laundry **1.54x**
- Grocery Retailers **1.15x**

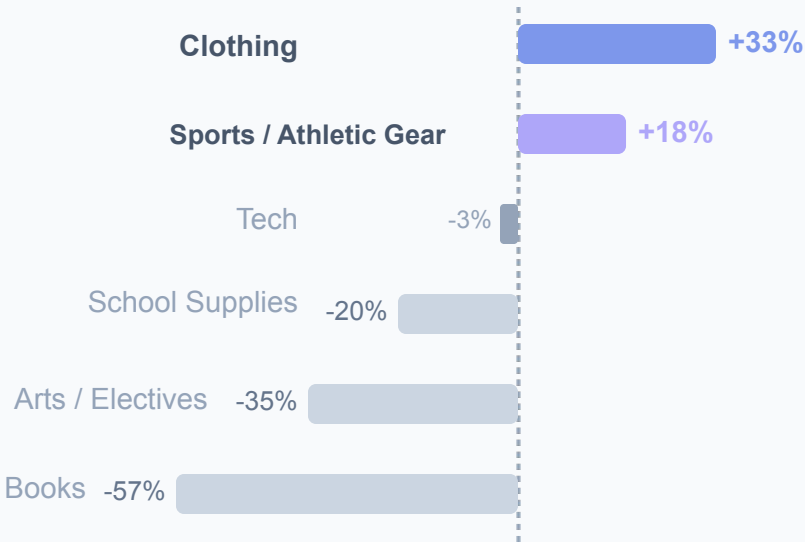


College audiences prioritize style, experience, and value

College audiences lean toward lifestyle-oriented spending — with **Clothing** ranking as the top purchase category — while taking a pragmatic approach to education, weighing **Campus Life**, **Academics**, and **Cost** in pursuit of a well-rounded college experience.

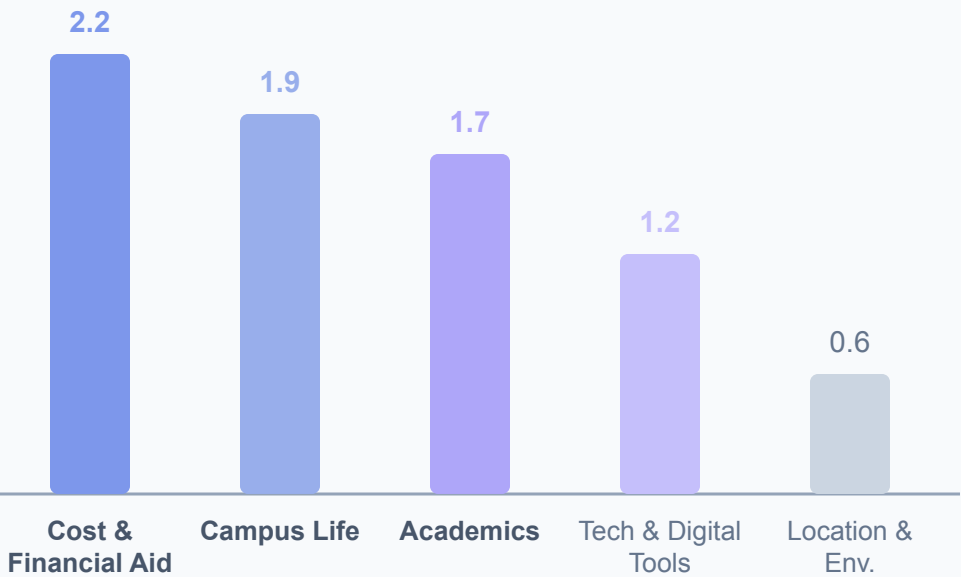
Back-to-School Products - College

Year-on-Year Change in Search



Student Considerations - College

Attributes



College Audiences

Key audience segments and trending search intent multipliers



Fashion-Forward Shoppers

- Outerwear **1.98x**
- Women's Apparel **1.79x**
- Designer Apparel **1.72x**



Active Campus Lifestyle

- Weightlifting **2.77x**
- Yoga & Pilates **2.37x**
- Gym Workouts **2.25x**



Tech Savvy Students

- Operating Systems **1.91x**
- AI **1.57x**
- Wearables **1.25x**



Dorm & Move-In Setup

- Laundry **1.49x**
- Bed & Bath **1.36x**
- Moving Homes **1.18x**



Budget-Conscious Students

- Wholesalers & Liq. **2.42x**
- Student Loans **1.74x**
- Deal Hunter **1.18x**



Professionals-in-Training

- Recruitment **2.06x**
- Job Hunting **1.69x**
- Graduate Student **1.54x**



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