

The Back-to-School Shopping Behavior Playbook

What Validated, In-Store Behavior Reveals About Winning This Year's High-Stakes Season

Back-to-School 2025 is more than a seasonal sales window. It's a high-pressure, family-driven shopping mission that compresses thousands of purchase decisions into a few short weeks. Shoppers come armed with lists, kids in tow, and evolving expectations from the brands and retailers they trust.

At the same time, macroeconomic pressure is building. According to CNBC, newly reintroduced Trump-era tariffs are raising costs on imported goods, including backpacks, apparel, and school supplies. Combined with inflation concerns, these pricing pressures are driving many families to shop earlier, budget more tightly, and be less forgiving when brands or retailers miss the mark.

In our latest in-store study, we captured Point of Emotion®, real-world feedback from 236 back-to-school shoppers at Walmart and Target using our location-triggered Surveys On The Go® platform. The result: a data-rich picture of what shoppers plan, what derails their trips, and how brands can do more to influence decisions before, during, and after the store visit.



Back-to-School Starts Earlier, Happens in Waves, and Involves the Whole Family

Back-to-school isn't one big shopping trip. It's a structured, emotional series of micro-decisions that begin well before school starts.

Key Shopper Behaviors:

78%

of BTS shoppers planned their trip ahead of time

72%

were shopping more than a month before school starts

65%

make two to three separate BTS shopping trips

47%

set a budget before they shop, but in-the-moment flexibility leaves room for unplanned purchases

Many families are also shopping earlier to get ahead of rising costs. CNBC reports that two-thirds of parents began their BTS shopping earlier than usual, hoping to avoid price increases caused by tariffs on goods imported from China, Mexico, and Canada. These tariffs are increasing prices on everyday items like pencils, notebooks, and lunchboxes, making planning and timing more crucial than ever.



Strategic Insight

Reach shoppers before they enter the store. With economic pressure rising, early influence is critical to win wallet share.



What's in the Cart and Who's Driving It

This year's BTS shopper is balancing practicality with emotion. Lists drive what's required. Kids drive what's added. And price drives what makes it into the cart — or doesn't.

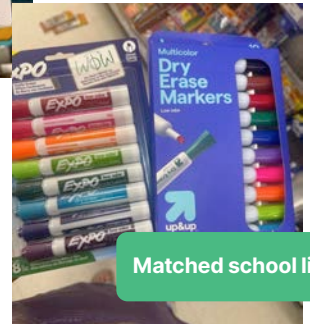
What shoppers are buying:

- **69% follow school-supplied lists**, but often purchase beyond them
- Most trips include both supplies and non-supplies, from snacks to apparel
- **61% say the school list is a top decision driver**
- **58% say price** is a top decision driver

This year, the pricing pressure is even more acute. As CNBC highlights, import duties are increasing the price of many back-to-school staples. Consumers are noticing. Many are sticking to their lists more rigidly, and price sensitivity is shaping what goes in the cart and what gets left out.

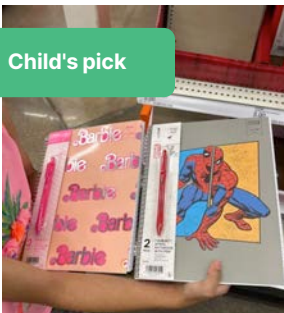


Chosen for price



Matched school list

Parents shared real-time comparisons of two BTS items they considered. These images reveal how packaging, price tags, and list alignment all factored into purchase decisions.



Child's pick



Strategic Insight:

Design product packaging and shelf signage that speaks to both audiences: the list-checking parent and the preference-driven child. Bonus points if it also signals value.

Who's making the call:

Shoppers

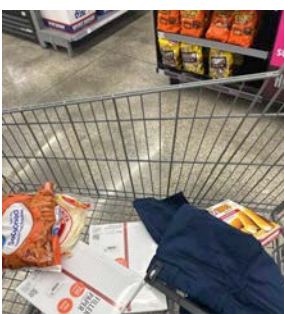
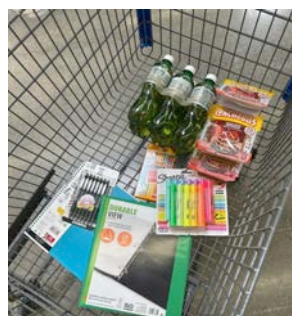
with kids report higher overall spend and more unplanned additions

73%

of shoppers bring their kids along

51%

of parents with children on the trip say their child's preference drives decisions



Final cart photos confirmed that BTS trips rarely stick to school supplies alone — showing opportunities for brands in adjacent categories like snacks, hygiene, and apparel.



Tariff-Fueled Frustrations Derail Loyalty



Parents are price-sensitive this year, and retailers and brands that fall short on availability or pricing face immediate shopper backlash.

Why this year feels different:

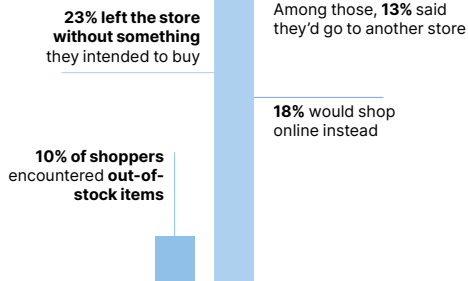
Tariffs on imports from China, Mexico, and Canada have pushed up prices on everything from backpacks to lunch boxes. As CNBC notes, price increases tied to tariffs are putting pressure on consumer spending habits, especially for lower and middle-income households preparing for school.



Strategic Insight:

For retailers, in-stock equals in-cart.
For brands, if your product isn't visible or priced competitively, the shopper may not wait for a second chance.

Friction Data



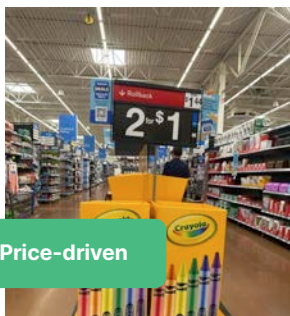
Walmart vs. Target: Same List, Different Mindset

Both Walmart and Target are major BTS destinations, but their shoppers approach the mission differently.



Slightly less likely to shop with children (**69%**)
Slightly higher walkaway rates (**25%**)

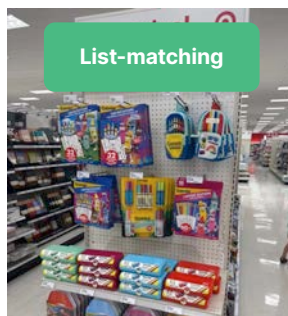
Less curated displays observed in shelf interaction photos



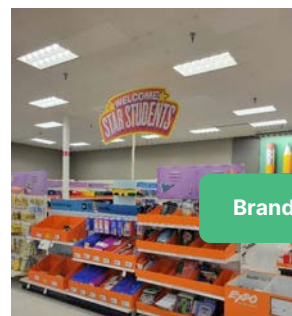
Price-driven



Slightly more likely to shop with children (**77%**)
Slightly lower walkaway rates (**21%**)
More curated displays observed in shelf interaction photos



List-matching



Branded

Shopper-submitted shelf photos from Target (left) and Walmart (right). Target displays leaned toward curated themes and clean signage, while Walmart emphasized visibility and value

At both retailers, pricing matters. But Walmart shoppers are more budget-conscious, while Target shoppers are more influenced by in-store experience. With tariffs inflating shelf prices, these behavioral differences may widen.



Strategic Insight:

At Walmart, focus on speed, value perception, and essentials



Strategic Insight:

At Target, reinforce availability, design appeal, and promotional clarity



Action Steps for Brands and Retailers



What Brands Should Do:

- Secure a spot on the school supply list and call it out on-pack
- Design for fast visual comprehension, especially in cluttered aisles
- Reinforce value messaging in light of tariff-driven price anxiety
- Appeal to both audiences: logic for parents, appeal for kids

What Retailers Should Do:

- Audit and restock high-frequency list items daily
- Surface early-bird promotions tied to key BTS categories
- Push list-matching support tools via apps or signage to reduce abandonment



Final Takeaway:

Shoppers aren't just stressed. They're strategic. And in a tariff-charged year, brands and retailers who ease friction and clarify value will win the cart and the customer.



Insight You Can Act On

Back-to-School isn't just a retail event. It's a barometer for how families are navigating inflation, trade policy, and economic uncertainty in real time.

This isn't speculation. It's been verified from geo-validated, shoppers across Walmart and Target. Uncovering in-the-moment shopper insights you need to reach parents earlier, drive repeat visits, and win more carts.



Want to see how your product performs in final cart photos?



Need real-time shopper intel during peak trip hours?



Looking to deploy mobile-triggered BTS messaging at the store level?

Let's talk.

MFour's in-the-moment data turns real behavior into real advantage.



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