

DATA INTELLIGENCE

Back-to-School Edition

Zenith
The ROI agency

Kids

Habits Study | RO

August 2026

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Highlights

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Media Habits: Summer's free time inflates the gains as much as habit does

- Screens multiply — and so do the minutes. The smartphone anchors the day; television still commands the widest daily reach, while streaming quietly matches it minute for minute. Social is home, but fewer show up — and those who do, stay longer.
- Year on year the change: tablets are in more hands yet hold less attention, consoles quietly conquer the weekend, and while television grows, daily social shrinks.

BTS Shopping Perspective: What's the influence window?

- Back to School isn't a season — it's a sprint. A list arrives from school, and summer turns into a mission with barely two weeks between "let's look" and "let's buy".
- Almost everyone buys. Nobody buys alone. Every category becomes a quiet negotiation — and there's one item where the child's voice clearly wins.
- Online is gaining ground, yet one category stubbornly refuses to leave the shelf. The reason isn't price; seems the need to touch and be sure.
- Value-hunting has simply become smart shopping. And when parents look for guidance, they seem to skip the brands and the influencers — the answer sits much closer to the classroom. Meanwhile, a new advisor has quietly joined the family.

Devices | Ownership & Time Spent Online

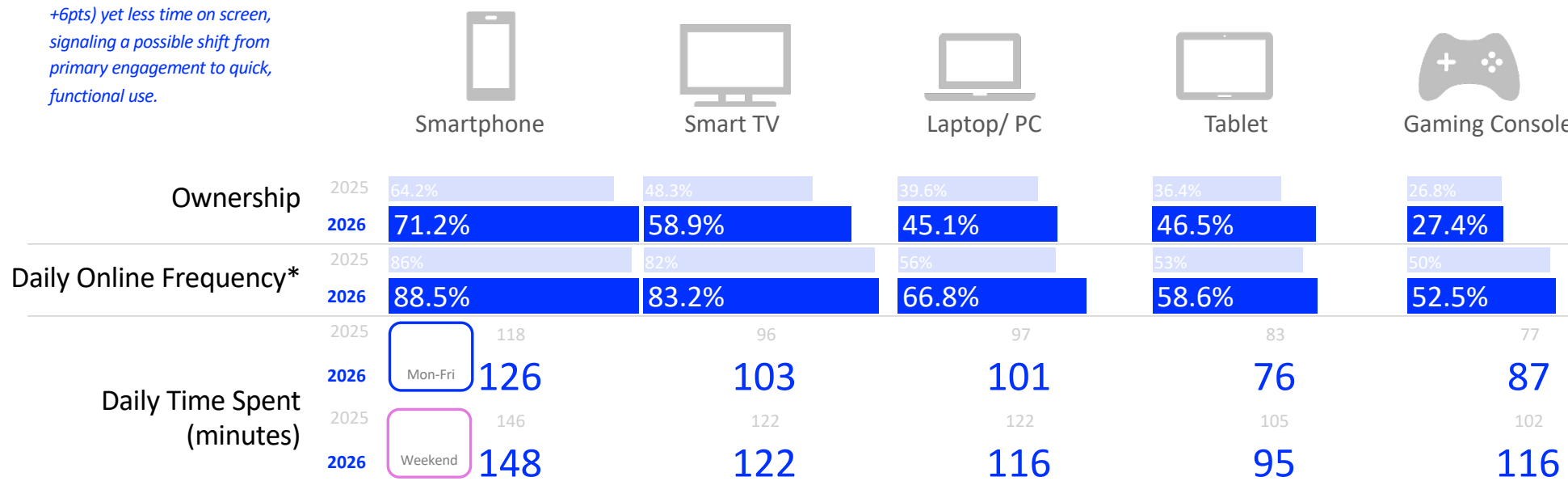
● 2025
last days of school year
● 2026
weeks of school holiday

yoy perspective

*Tablets with wider footprint
 (ownership +10pts, frequency
 +6pts) yet less time on screen,
 signaling a possible shift from
 primary engagement to quick,
 functional use.*

Smartphones anchor always-on connectivity, while weekends unlock more leisure across TVs, computers and gaming.

On weekdays, smartphones lead usage at just over 2 hours, rising to nearly 2.5 hours at weekends. Smart TVs and computers each grow from around 1.7 hours on weekdays to roughly 2 hours at weekends, while gaming consoles show the sharpest weekend jump — from ~1.5 to nearly 2 hours — as leisure time expands.



Q28. What devices do you have, and do you generally use? (ownership)
 Q32. How often are you online in a typical month using the devices you have?

Every day/ On most days/ Once or twice a week/ Less often/ Never

Q33. On average, how long do you spend online on a weekday, Monday through Friday, using the devices you have?

Q34. But on a weekend day, how long do you spend online on average?

Base: 514

*usage frequency mentioned: every day OR on most days

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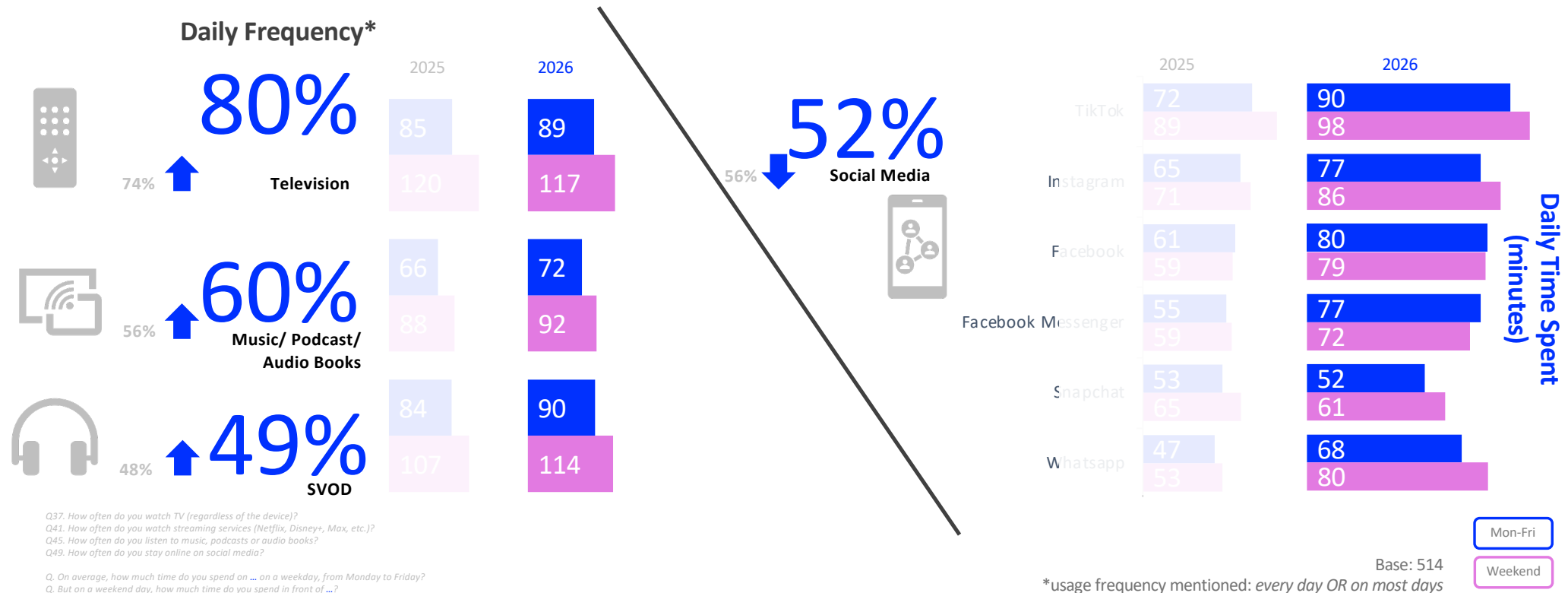
Media Consumption

Traditional media strengthens; interactive content deepens.

● 2025
last days of school year

● 2026
weeks of school holiday

TV leads frequency (80%) & weekends (117 min), SVOD grows on both weekday and weekend (90/114 min), while social frequency dips (52%) but sessions intensify — TikTok leads at 90/98 min.



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FAVORITE INFLUENCERS



Q56. Which influencers do you follow regardless of the social media platform (TikTok, Instagram, YouTube, etc.)?

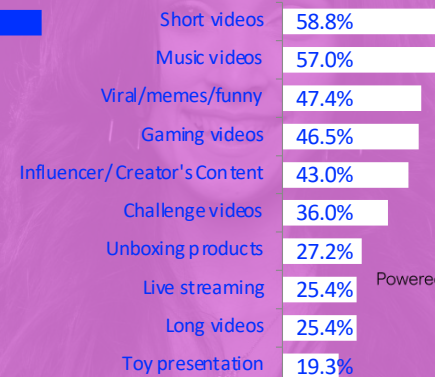
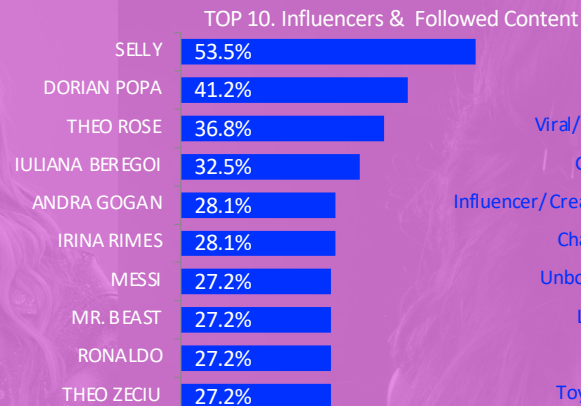
Q56.1 From which areas do the most followed influencers of you and your generation appear?

Q56.2. What type of content is followed through the influencers followed?

Base: 114

*kids that are Social Media users & declare they are followers of different influencers


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**Back-to-School
Shopping
Perspective**

Kids


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TIMING & TRIGGERS

the influence window

The school list & the need of a fresh new looking starts the clock. Two weeks from research to checkout.



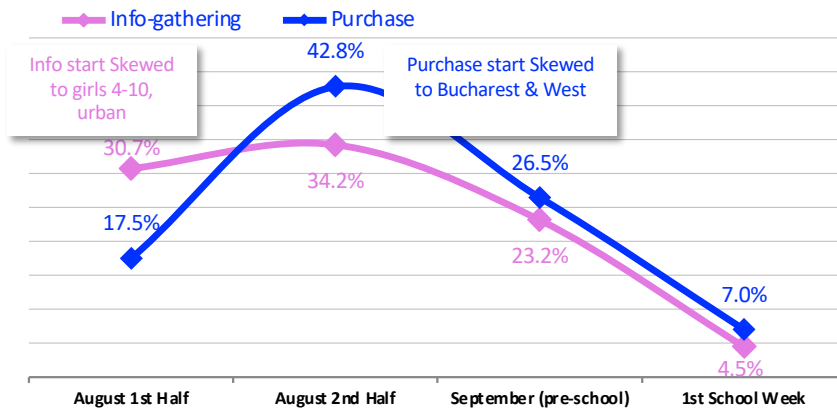
65% 2 wks 87%

August Info-gathering

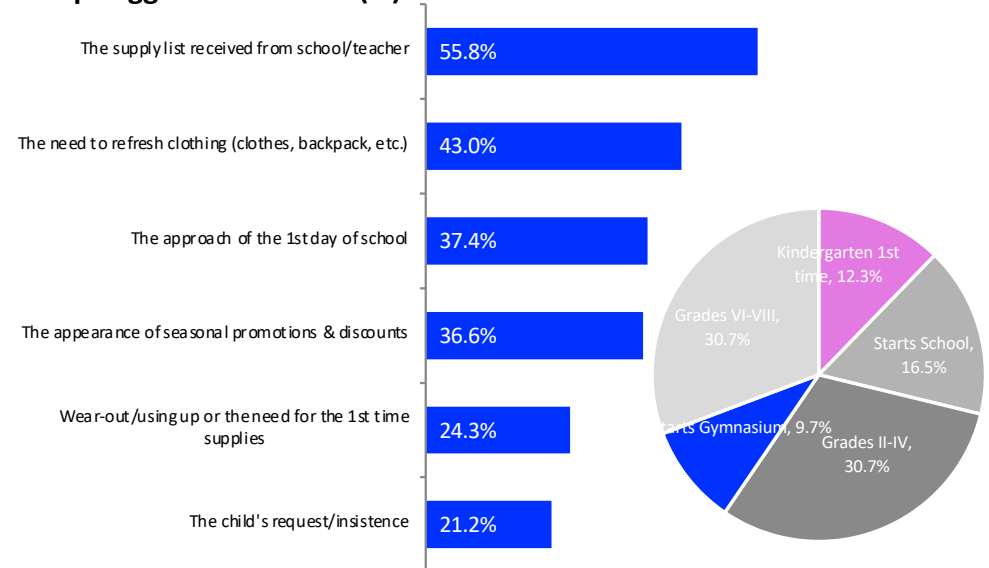
info → purchase gap

pre-school purchase

Info vs. purchase by moment (%)



Top triggers of the start (%)



Q75. Thinking about the upcoming school year, what stage is your child at?

Q76. When do you usually start each of the following activities regarding shopping for the new school year?

Q77. What usually triggers the Back to School shopping for your child?

Base: 514

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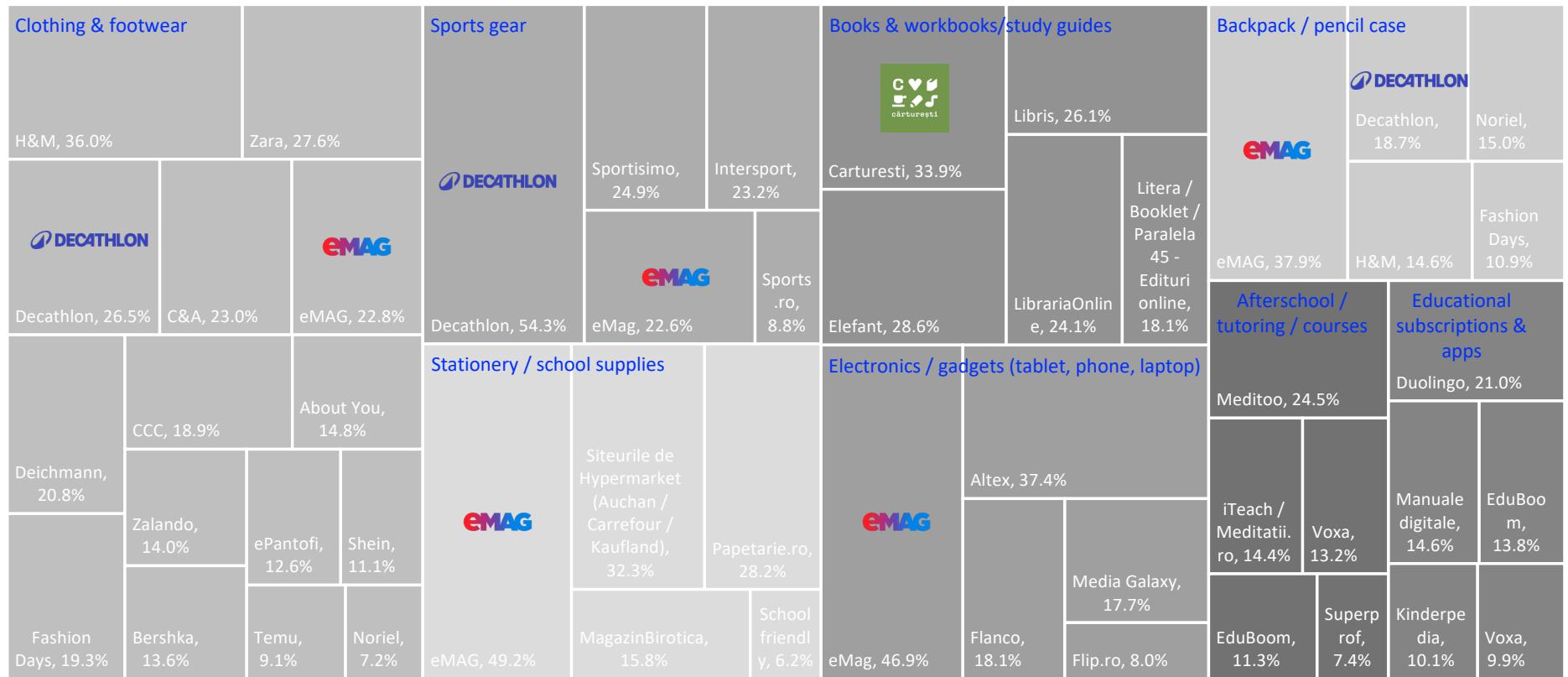
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CHANNELS & RETAILERS

top online shops | eMAG opens the basket; every category then crowns its own specialist.





DRIVERS

Why they buy?

Durability first,
price the trigger.

Sustainability
arrives disguised
as thrift.

73.3%

price & discounts matters in buying decision

50%

reuse last year's items if in good condition



Q87. To what extent do promotions and discounts matter in your purchase decisions?
Q89. To what extent does each of the following statements apply to you regarding your back-to-school shopping?

Base: 514

[illegible]

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QUESTIONNAIRE STRUCTURE & MEASURED KPIs

2025 2026

DEMOGRAPHICS	gender, age, urbanization, region, children in the HH, education for both, parents & children; but, also income, pets in HH, other members living in the HH, parent's civil status;	✓	✓
LIFESTYLE	interests, important things to them, attitudes in general but also regarding devices, career, being online, music/ podcast, social media, television or video games, preferred courses from school, afterschool activities , fun activities or weekend activities;	✓	
FINANCES & DECISIONS	personal wallet, deciders of bought/ owned devices, clothes, toys, video games or basic needs;	✓	
HOLIDAYS	frequency & destinations (as experienced or wished – only for 11-14 y.o.);	✓	
GIFTS & CELEBRATIONS	different types of wishes, toys , video games and playing time & types;	✓	
DEVICES & DIGITAL	owned devices, online activities, preferred OLV, privacy settings, frequency of being online & daily time spent on each devices owned – during Mon-Fri & Weekend*;	✓	✓
MEDIA CONSUMPTION	frequency & daily time spent on different media (movies, Television, AV Streaming & SVOD, Music/ Podcast/ Audio Books), preferred genre for Television, AV Streaming & SVOD platforms, audio & music platforms;	✓	✓
SOCIAL MEDIA	frequency & daily time spent on different social platforms, accounts no., reasons of usage, influencer followed or on trend, preferred influencers area of activity & content type;	✓	✓
VIDEO GAMES	owned devices, frequency, total time spent on Mon-Fri or weekend, gaming preferences, playing habits (players, eSports);	✓	
SPORT	sports practiced and/ or watched (sport events, preferred football teams);	✓	
SOCIAL	financial situation, kid independence, domestic violence exposure, school relationships (with teachers, other children).	✓	
BTS Shopping			✓

Base: 514

*Daily Time Spent: KPI measured for the ones who mentioned an “every day OR on most days” usage frequency.

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Power BI Report Sample

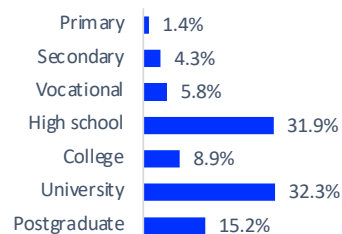
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DEMOGRAPHICS | 2026

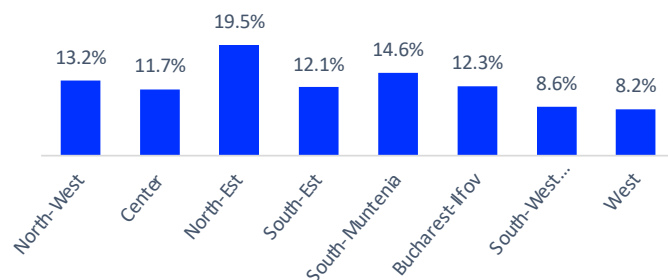
Gender



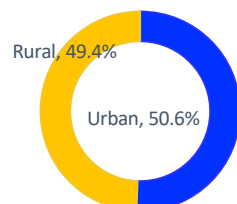
Education



Region



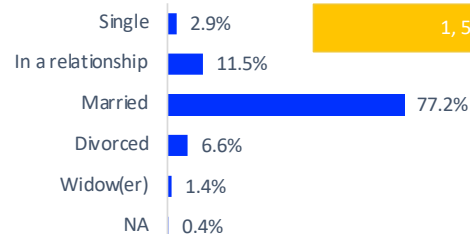
Urbanisation



Age



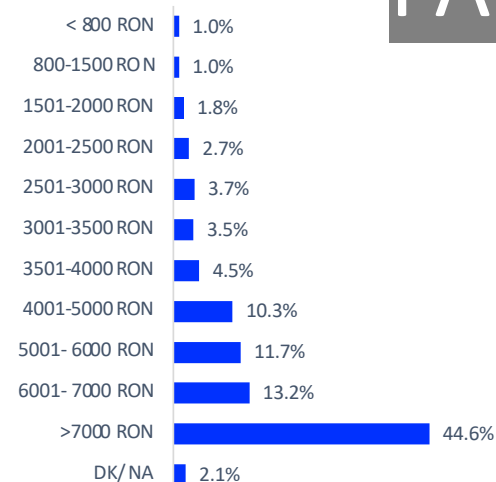
Civil Status



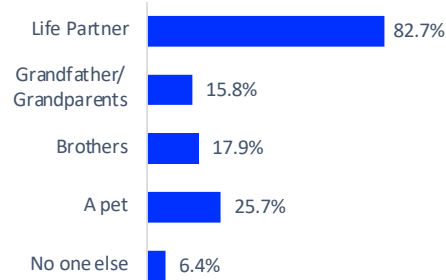
Children in the HH



HH Income



HH Composition



PARENTS

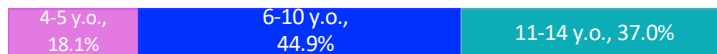
Base: 514

DEMOGRAPHICS | 2026

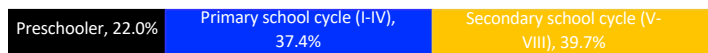
Gender



Age



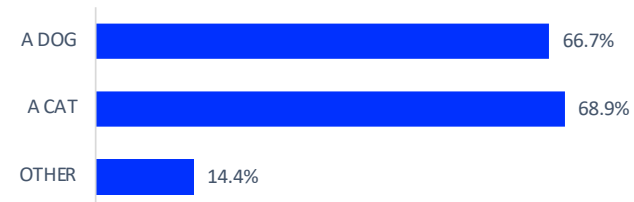
Education



Children in the HH



Pets in HH



KIDS

Base: 514

SAMPLES STRUCTURE

Gender

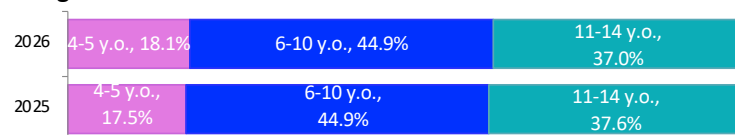


Children in the HH

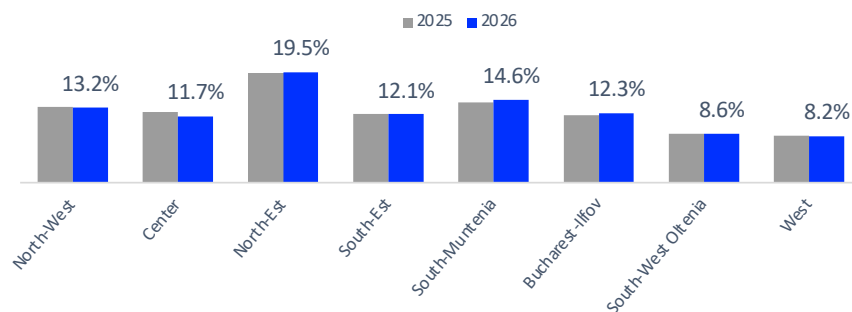


KIDS

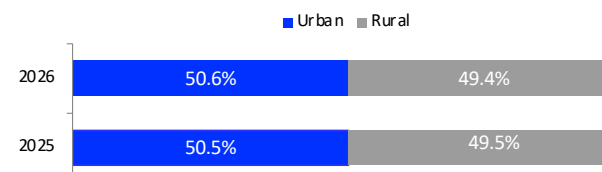
Age



Region



Urbanisation



Base: 2025 = 497; 2026 = 514.

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Thank You!


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LET'S STAY



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