



Road to Christmas 2022 Toy Study

From awareness to purchase:
No Christmas tale, but the real story how your products get bought ...

iconkids & youth international research GmbH

Rückertstraße 4 • 80336 München • Tel.: +49 (0)89 544629-0 • Fax: +49 (0)89 544629-24
info@iconkids.com • www.iconkids.com

Three reasons why you should take a close look at the *Road to Christmas 2022 Toy Study*:

1

What is the "NEW Normal"?

The pandemic is over – but how has it shaped the customer journey for toys?

2

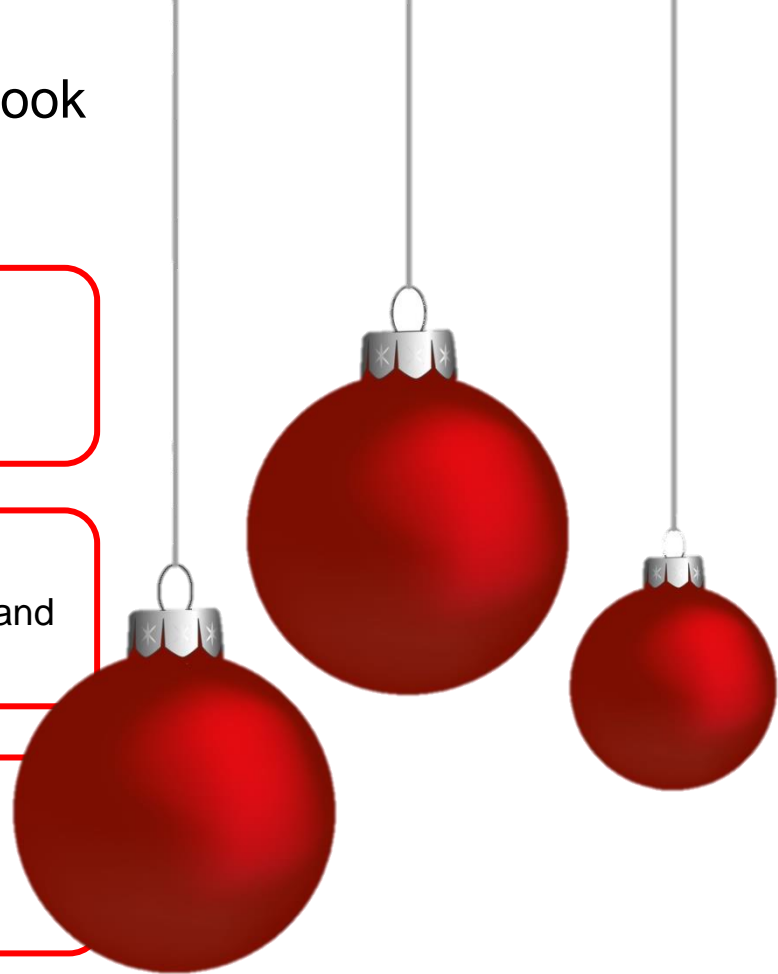
Fresh data for YOUR brand!

Learn how consumers find and buy your products – and measure this against your competition.

3

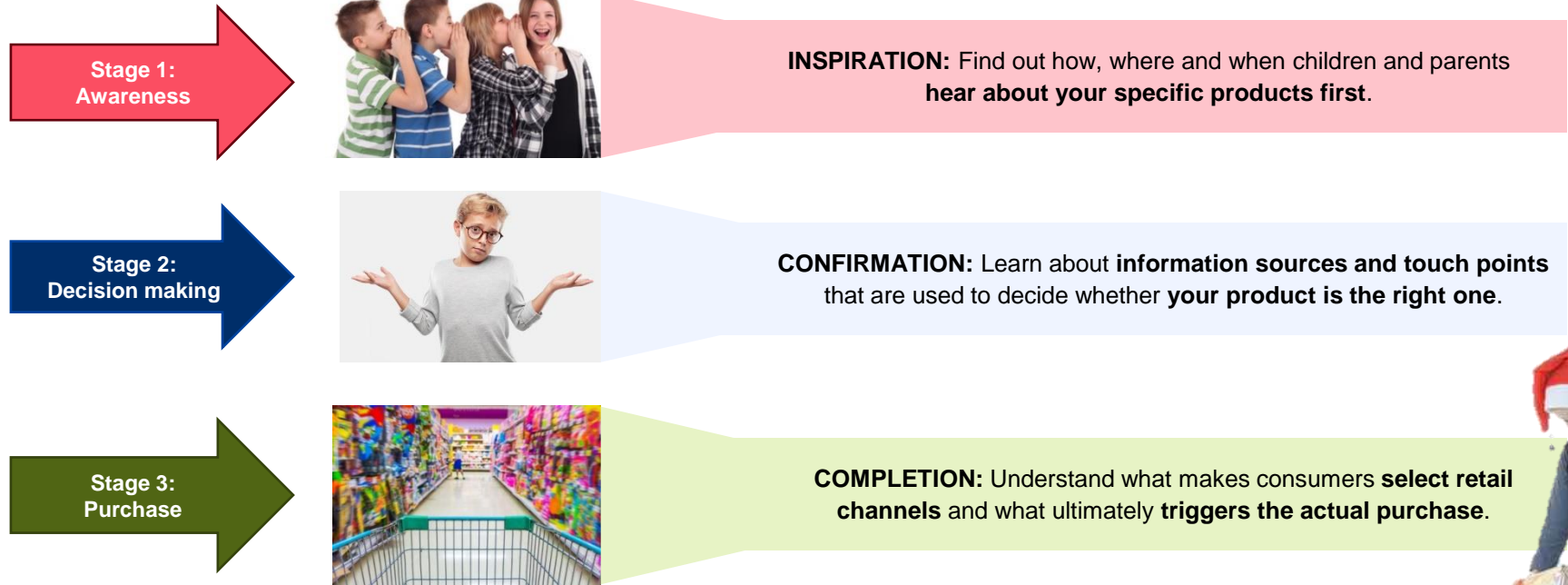
Kids AND Parents in one study!

The only study that embraces both the kids and parents perspective.



Road to Christmas Toy Study 2022:




Fresh and reliable data for all stages of the **Customer Journey**.



Unique and innovative: A comprehensive representation of the Christmas gift purchase process in Germany, year 2022.



WHAT we will cover: The Customer Journey for Toys on the *Road to Christmas*

	Toys that were bought (parent) or are on the wishlist	Stage 1: Awareness Inspiration 	Stage 2: Decision making Confirmation 	Stage 3: Purchase Completion 
Parents	For up to 3 toys that were bought:			
	Toys will be typed in by the respondents and coded by: <ul style="list-style-type: none"> Type of toy / category Brand Is it the first toy from the brand? Price point <i>We aim at covering 1 toy per price point if possible – see next page.</i>	<ul style="list-style-type: none"> Usage of touch points to learn first about new toys (frequency) For each of the bought toys: <ul style="list-style-type: none"> Who gave the idea to buy the toy (was it requested by the child)? Touch point for 1st contact with the toy? Incl.: When did this happen? 	<ul style="list-style-type: none"> Relevance of touch points / sources to collect information about new toys <ul style="list-style-type: none"> Frequency of usage Impact for the decision making For each of the bought toys: <ul style="list-style-type: none"> Used touch points / sources to collect information about this specific toy? Most relevant / decisive touch point / source for the decision for this toy? 	<ul style="list-style-type: none"> Relevance of shopping channels for toys in general, for each channel: <ul style="list-style-type: none"> Frequency of purchases Price points / purchase occasions For each of the bought toys: <ul style="list-style-type: none"> When was the toy bought? Where was the toy bought? Reasons for buying the toy there?
Children aged 7-12 years	For up to 3 toys from the wishlist:			
	Toys will be typed in by the respondents and coded by: <ul style="list-style-type: none"> Type of toy / category Brand Is it the first toy from the brand? 	<ul style="list-style-type: none"> Usage of touch points to learn about new toys (frequency) For each of the toys on the wish list: <ul style="list-style-type: none"> Touch point for 1st contact with the toy? When did this happen? 	<ul style="list-style-type: none"> Relevance of touch points / sources to collect information about new toys <ul style="list-style-type: none"> Frequency of usage Impact for the decision making For each of the bought toys: <ul style="list-style-type: none"> Used touch points / sources to collect information about this specific toy? Most relevant / decisive touch point / source for the decision for this toy? 	



The Details: **CONTENT** – We will cover all relevant *Touch Points* (tbd)

Physical:

1

Advertising in ...

- TV
- Print magazines
- Outdoor
- Brochures / leaflets from retailers

2

Catalogues

- Catalogues from toy companies
- Catalogues from retailers

3

Brick and mortar stores

- Shop from toy companies (only toys from that brand)
- Local specialized toy store
- Toy store chains (e.g. Smyths)
- Drugstores with toy department (e.g. Müller, Rossmann)
- Supermarkets (e.g. Rewe, Edeka)
- Food discounter e.g. (Aldi, Lidl)
- Generalist discounter (e.g. TEDI, Action)
- Department stores (e.g. Galeria)
- Hypermarkets (e.g. Real)

Digital:

4

Posts on Social Media (UGC)

- YouTube
- TikTok
- Instagram
- Snapchat
- Facebook
- Blogs / Fan pages in general

5

Online sources (incl. online shops)

- Websites / -shops of toy companies
- Other Websites
- Amazon
- Online toy stores (e.g. mytoys)
- Generalist online stores (e.g. otto)
- Price comparison websites (e.g. idealo)

6

Online advertising (e.g. banner, promotions) on ...

- General interest / news websites
- Shopping websites
- Kids websites, e.g. from TV channels
- Instagram
- TikTok
- Facebook
- YouTube (e.g. pre-roll)

PR / Journalism:

7

Reports ...

- In print magazines
- On TV or radio
- On Parent websites
- On general interest / news websites

Personal contact:

8

Recommendations by ...

- Parents (children only!)
- Child (parents only!)
- Adult friends and relatives
- Friends of the child
- (Kindergarten) teacher



The Details: **CONTENT** – The *Sales Channels* and *Toy Categories* we will look at (tbd)

Sales Channels (where is the product bought):

1

Brick and mortar stores

- Shop from toy companies (only toys from that brand)
- Local specialized toy store
- Toy store chains (e.g. Smyths)
- Drugstores with toy department (e.g. Müller, Rossmann)
- Supermarkets (e.g. Rewe, Edeka)
- Food discounter e.g. (Aldi, Lidl)
- Generalist discounter (e.g. TEDI, Action)
- Department stores (e.g. Galeria)
- Hypermarkets (e.g. Real)

2

Online:

- Webshops of toy companies
- Amazon
- Specialized online toy stores (e.g. mytoys)
- Online stores of toy retailers (e.g. Smyths, Müller)
- Generalist online stores (e.g. otto)

Toy Categories, e.g.:

Categories will be coded based on open entry of products and brand name. List to be defined.

- Action figures
- Baby dolls
- Board and card games
- Construction toys
- Creative toys, arts & crafts
- Fashion dolls
- Educational toys
- Electronic toys
- Large role play toys (e.g. play kitchen, play house)
- Outdoor toys (physical activity and dexterity)
- Plush toys
- Puzzle
- Role play toy systems (e.g. LEGO, Playmobil, Schleich)
- Science and optical toys
- Vehicles, e.g. cars, planes, ships (not radio-controlled)
- Vehicles, e.g. cars, planes, ships (radio-controlled)
- Video game systems
- Wooden toys



The **Center Piece** of the Analysis:

We will show you the **impact of each Touch Point for your category** - and even for your brand!

- 1 Advertising
- 2 Catalogues
- 3 Brick and mortar stores
- 4 Posts on Social Media (UGC)
- 5 Online sources (incl. online shops)
- 6 Online advertising
- 7 Reports (PR / Journalism)
- 8 Personal recommendation

Included: Analysis and graphs in the PowerPoint report will be differentiated by:

- **Age** of the child
- **Gender** of the child
- **Main toy categories**
- **Touch Points & Sales Channels** (each listed in detail)
- **First purchase** of the brand (= did the touch point win new customers) vs. **repeated purchase** (= did it build brand loyalty?)

+

Included: Excel Tables will be differentiated also by:

- Most mentioned **toy brands**, i.e. separate columns for all brands that were bought by at least n = 50 respondents in the total sample

On request: We prepare **customized reports** for your ...

- **Category** – with focus on your brand and close competition
 - **Brand**
 - **Product**
- Base must be at least n = 30



The Details – **HOW** will we do it?

- Methodology:** **Quantitative online survey**
(mobile-friendly questionnaire)
- Sample:** **n = 1000** parents of children aged 2 – 12 years
Online representative, quota are set age & gender of the child, regional spread, social grade
- Age 2 – 6 years (n = 500): Only the parent is interviewed
 - Age 7 – 12 years (n = 500): Both parent and child are interviewed (parent first, child second)
- Questionnaire:** **Standardized questionnaire**
- Fieldwork:** **Mid-December 2022**
- Reporting:** **PowerPoint report**
Excel tables with tables split by ...
- Sociodemographic criteria
 - Top brands (for all brands that were bought by at least n = 50 respondents in the sample)



Road to Christmas Toy Study 2022: A quick Summary ...

This is what you get – look at all the Christmas Gifts we have prepared for you!

Up to **4500 Christmas toy purchases** will be explored:

- Up to **3000** customer journeys are obtained from **parents of 2-12 year-olds**
- Up to **1500** customer journeys come from their **children aged 7-12 years**

Observed toy purchases **split by price points:**

- **Low price segment:** 10-30 Euro
- **Mid price segment:** 30-70 Euro
- **High price segment:** > 70 Euro

All relevant Touch Points and Sales Channels are covered:

- Advertising
- Catalogues
- Brick and mortar Stores
- Posts on Social Media (UGC)
- Online sources (incl. online shops and price comparison websites)
- Online advertising
- Media reports (PR / Journalism)
- Personal recommendation

Touch Points are analyzed by:

- Relevance in different stages of the customer journey / purchase process
- Actual impact on the purchase decision

Sales Channels are analyzed by:

- Relevance in the customer journey / purchase process
- Drivers and Barriers

Purchase processes are differentiated:

- **Toy category**
- **Brand** – each brand with at least n = 50 respondents will be reported in the detailed tables

Relevance of Touch Points is analyzed separately for two stages of brand engagement:

- **Recruitment:** Is the toy on the wishlist the first toy from the brand?
- **Retention:** Or is it an additional purchases?



The Details – COSTS and TIMING

End-of-year budget issues? Talk to us 😊

Costs:	Study Report: <i>Includes full PowerPoint report and complete Excel tables</i>	€ 4,000.--
	Customized report for your brand: <i>Only in combination with purchase of the study report</i>	€ 1,500.--
	Customized online presentation: <i>Only in combination with purchase of the study report</i>	€ 800.--
Timing:	Finalization of the questionnaire:	Early December 2022
	Fieldwork:	Mid-December 2022
	Delivery of the report:	End of January 2023
	Delivery of customized reports:	February 2023

The offer is non-binding.

Please note that the copyright of the study remains with iconkids & youth. The sharing of results (also in excerpts) is only permitted in consultation with iconkids & youth.

Costs excl. 19% VAT. Costs are due within 10 days after ordering the study without any deduction for whatever reason. The General Terms and Conditions (AGB) of iconkids & youth international research apply. Any change of conditions is only possible with the of iconkids & youth.



Project Team & Toy Experience

The project will be managed by **Axel Dammler** and **Nilufar Amberger**



Axel Dammler (Managing Director)
E-mail: a.dammler@iconkids.com
Phone: +49-89-544629-33

Axel is a leading expert for the German toys market. He is jury member for the Toy Award and member of the Trend Committee for the Nuremberg Toy Fair and regular speaker at toy events and publisher of articles about the toys market. He counts most major toy manufacturers as his clients.



Nilufar Amberger (Senior Project Manager)
E-mail: n.amberger@iconkids.com
Phone: +49-89-544629-25

Nilufar is Project Manager .After university she started working at iconkids & youth for 5 years, gathering extensive experience in consumer and media research. Since September 2022 she is back with iconkids & youth.