

Road to Christmas Toy Study 2023

*From awareness to purchase:
How your products find their place
under the Christmas tree*

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Is your communication strategy on point?

The media landscape is changing dramatically. Are you leveraging the right touch points to reach your target group?



Who are your customers?

Parent or child: Who finds your products and who decides about the purchase?



Are you recruiting new users?

Did you win new fans with this year's products, or do you "only" activate to those buyers you had before already?

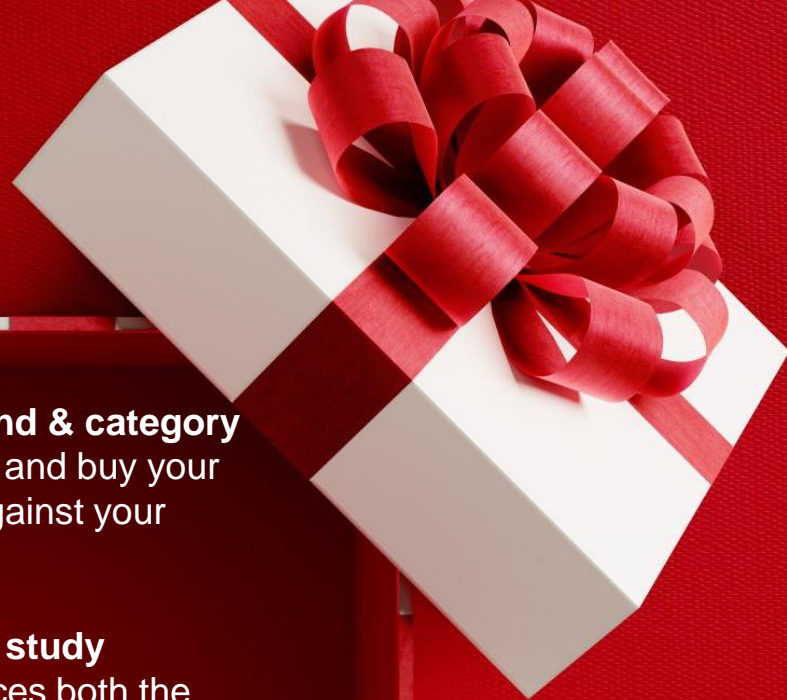


How does your target group shop?

Where do they buy and when? Do they wait for special offers or is no promotion needed to persuade them?

*If you are looking for answers to these questions you should take a closer look at our **Road to Christmas Study**.*

We have a nice parcel for you:



- 1. Fresh data for YOUR brand & category**
Learn how consumers find and buy your toys – and measure this against your competition.
- 2. Kids AND Parents in one study**
The only study that embraces both the kids' and parents' perspective.
- 3. Full market representation**
All touch points, all retailers, all stages of the purchase process in one report.

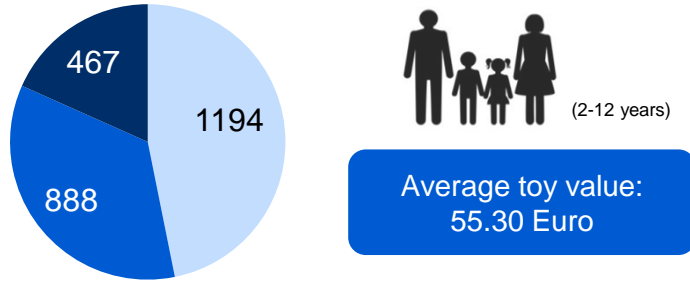
To show you what
you will get ...



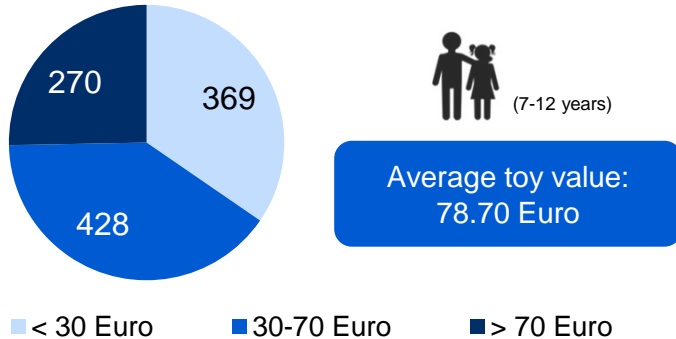
... let's take a quick
look at last year's study.

The **2022** Christmas Study was the most comprehensive and detailed Toy Shopping Study ever: The data reported **more than 3,600 individual toy purchases!**

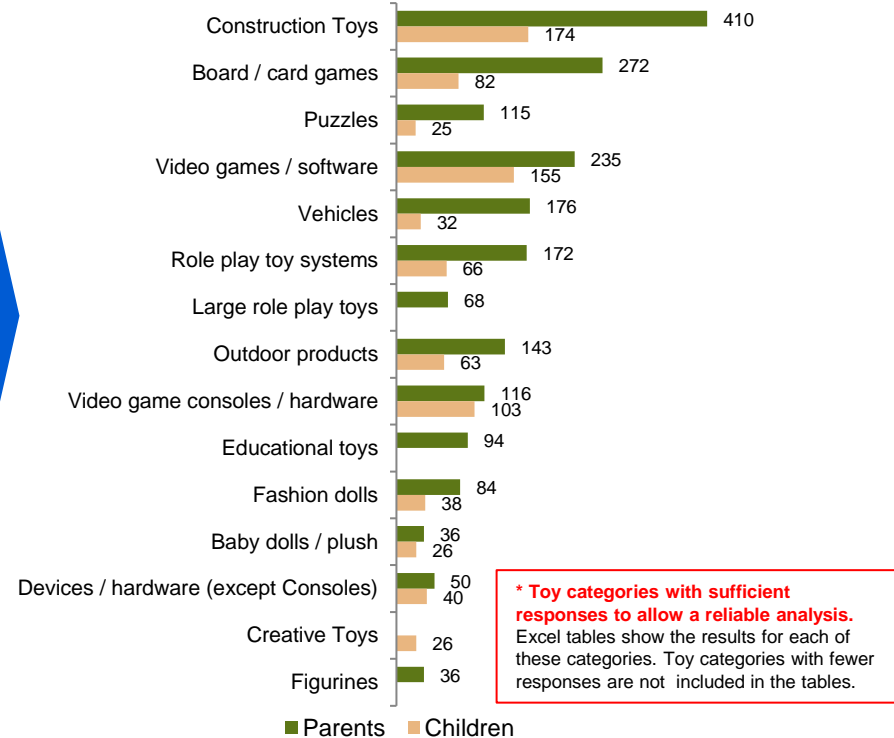
2,559 purchase processes among parents:



1,067 Christmas wish processes from children:



3,626 toy purchase journeys on the Road to Christmas 2022 – analyzed by most important toy categories*:

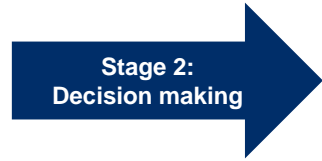


Road to Christmas Study 2022: Products mentioned by **n = 1,051 parents** of children aged 2–12 years and **n = 517 children** aged 7–12 years (absolute numbers).

Road to Christmas Toy Study 2023: The Content Covered **stages of the Customer Journey.**



INSPIRATION: Find out how, where and when children and parents **heard about your specific product first.**

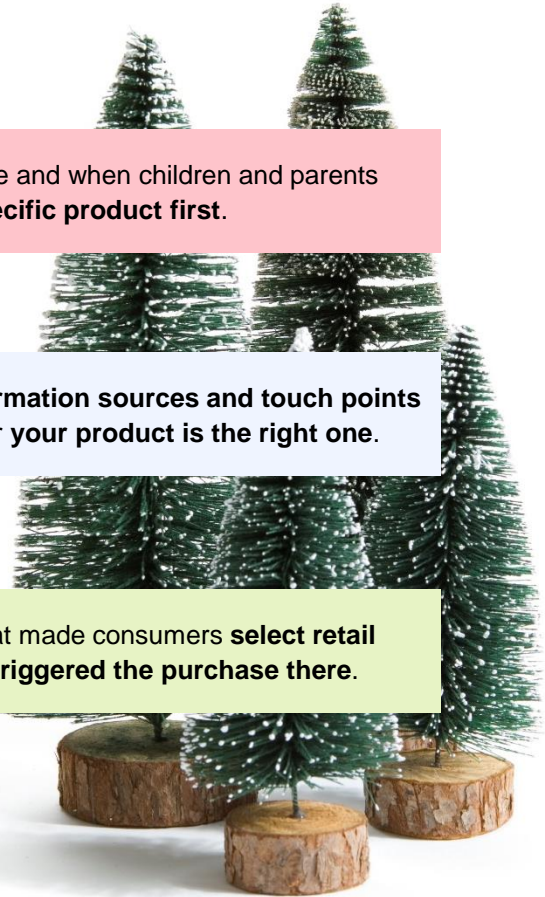


CONFIRMATION: Learn about **information sources and touch points** that were used to decide whether **your product is the right one.**



COMPLETION: Understand what made consumers **select retail channels** and what ultimately **triggered the purchase there.**

Unique and innovative: A comprehensive representation of the Christmas gift purchase process in Germany, year 2023.

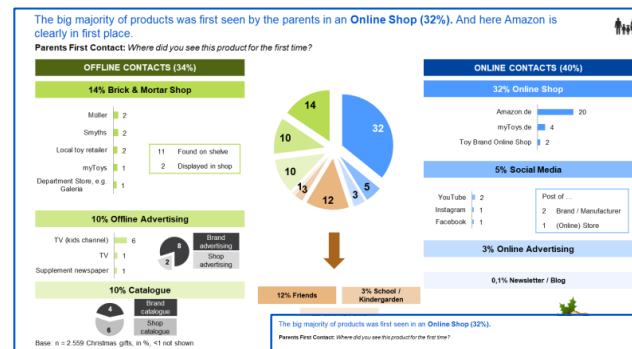


Road to Christmas Toy Study 2023: The Content

Awareness: The touch points that inspired Christmas gifting.

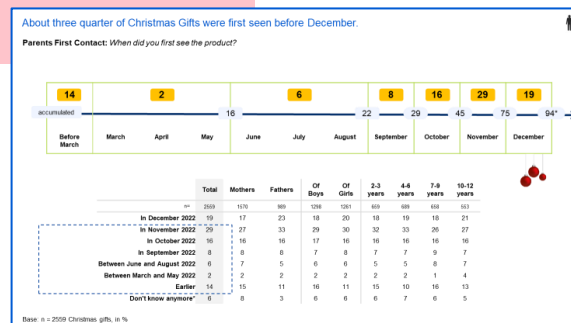
Stage 1: Awareness

- **When** did they see the toy for the first time?
- **Where** did consumers see the toy for the first time?
 - *If seen in advertising:* Who advertised (retail, brand) and where was the advertising seen?
 - *If seen in a store:* How was the product presented?
 - *If seen in a catalogue:* What catalogue (brand, retail)?
 - *If seen on social media:* What platform and what kind of post (friend, blogger, brand ...)?
 - *If seen online:* What website, what kind of content ...?
 - ...
- **Who** discovered the product?



Separate analysis for parents and children:

- Slides for sample total and subgroups based on age & gender of the child
- Excel tables with numbers for
 - Price point (low / middle / high)
 - First or repeat purchase
 - Product categories with at least 30 purchases
 - Brands and IPs with at least 30 purchases



(Slides from the 2022 study)

Road to Christmas Toy Study 2023: The Content

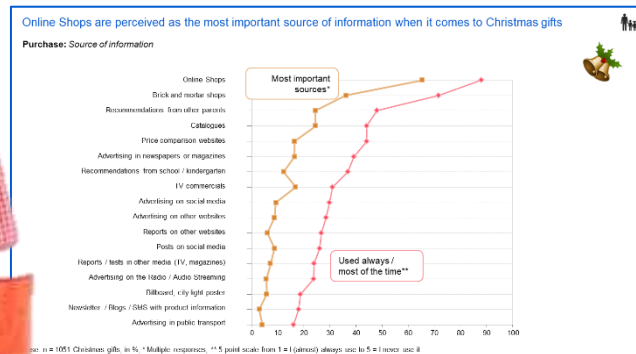
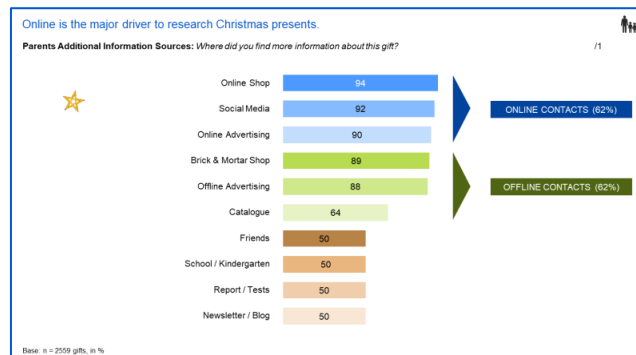
Decision Making: The sources that **informed and confirmed** the purchase decision.

Stage 2: Decision making

- **Where else** did consumers look for information about this specific toy? *(Same list as for Stage 1)*
- **Which** information source was **most important / decisive** for this specific purchase decision?
- **Usage** of touch point / information sources **in general**
- **Most important** touch point / information sources **in general**

Separate analysis for parents and children:

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(Slides from the 2022 study)

Road to Christmas Toy Study 2023: The Content

Purchase: How, where and when the toys are bought.

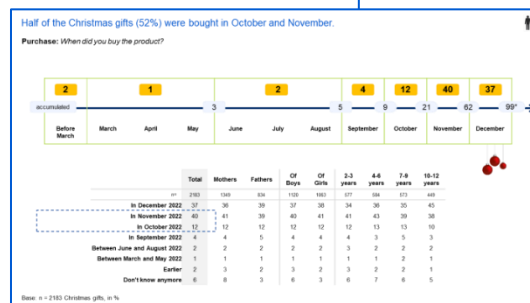
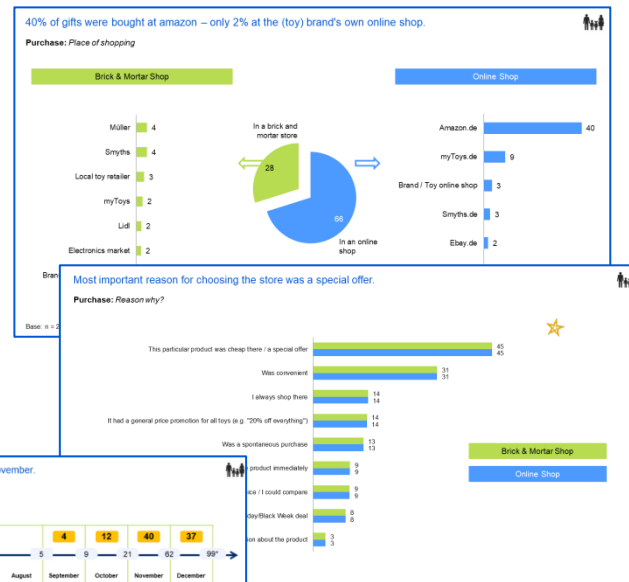
Stage 3: Purchase

(NB: Parents only!)

- **Where** was the specific toy bought / where will it be bought? (See next page for the list of stores)
- **Why** was the toy bought in that store (prompted list of purchase drivers)?
- *If purchased already at the time of research (in 2022 85 % of recorded purchases!): When exactly before Christmas was the toy bought?*

Analysis for parents:

- Slides for sample total and subgroups based on age & gender of the child
- Excel tables with numbers for
 - Price point (low / middle / high)
 - First or repeat purchase
 - Product categories with at least 30 purchases
 - Brands and IPs with at least 30 purchases



(Slides from the 2022 study)

The **Center Piece** of the Analysis: This is what you get

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

1

Offline Advertising (TV, print, ...)

2

Catalogues

3

Brick and mortar stores

4

Social Media

5

Online shops

6

Online sources / online advertising

7

Reports / tests

8

Personal recommendation

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

- **NEW:** Trend Comparison to 2022 (total)
- **Age** of the child
- **Gender** of the child

+

Included: Excel Tables will be differentiated also by:

- **Price points**
- **First purchase** of the brand (= did the touch point win new customers) vs. **repeated purchase** (= did it build brand loyalty?)
- Main **toy categories** (see page 5)
- Most mentioned **toy brands and IPs**, i.e. separate columns for all brands that were bought by at least n = 30 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 Proposal

Study details, costs and timing

The Proposal – **HOW** will we do it?

- Market:** **Germany**
(other markets tbd)
- Methodology:** **Quantitative online survey**
(mobile-friendly questionnaire)
- Sample:** **n = 1000 parents** of children aged 2 – 12 years
and **n = 500 children** aged 7 – 12 years
Online representative, quota are set on 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**
- Reporting:** PowerPoint report
Excel tables
Presentation on request



The Proposal – Costs and Timing

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

Costs:	Study Report:	€ 4,000.--
	<i>Includes full PowerPoint report and complete Excel tables</i>	
	Customized report for your brand / category:	€ 1,500.--
	<i>Only in combination with purchase of the study report</i>	
	Customized online presentation:	€ 800.--
	<i>Only in combination with purchase of the study report</i>	
Timing:	Finalization of the questionnaire:	Early December 2023
	Fieldwork:	Mid-December 2023
	Delivery of the report:	End of January 2024
	Delivery of customized reports:	February 2024

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.





And finally:
Are you **interested**
in other markets?
Talk to us!

Project Team & Toy Experience

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



Axel Dammler | Managing Director

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.

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Nilufar Amberger | Senior Project Manager

Nilufar started her career at iconkids & youth right after university. Over the course of 5 years, she gathered extensive experience in consumer and media research. Since September 2022 she is back with iconkids & youth.

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