

Road to Christmas Toy Study 2025

🇩🇪 Germany 🇫🇷 France

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

iconkids & youth international research GmbH

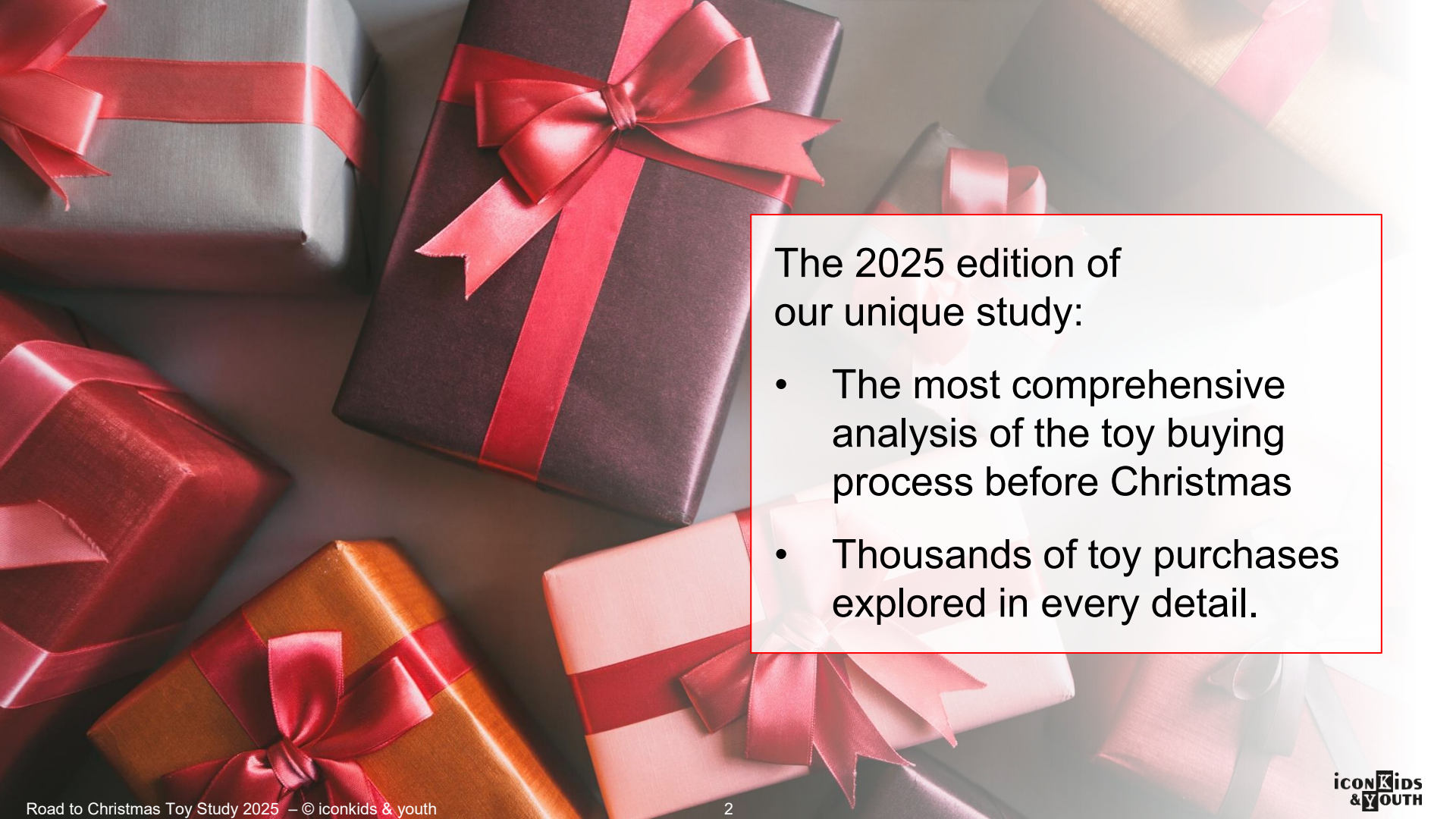
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iconKids
& YOUTH



The 2025 edition of
our unique study:

- The most comprehensive analysis of the toy buying process before Christmas
- Thousands of toy purchases explored in every detail.

*If you need answers to these questions
you should look at our Road to Christmas Study.*



Was your Christmas communication strategy on point?

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



Who were your customers this Christmas?

Parent or child: Who found your products and who decided about the purchase?



Did you recruit new users in the Christmas season?

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



How did your target group buy toys for Christmas?

Where did they buy and when? Did they wait for special offers or was no promotion needed to persuade them?

Study Content: For each toy all stages of the customer journey on the *Road to Christmas*

	Toys that were bought (parent) or are on the wish list	Stage 1: Awareness <i>Inspiration</i> 	Stage 2: Decision making <i>Confirmation</i> 	Stage 3: Purchase <i>Completion</i> 
Parents	For up to 3 toys that were / will be bought (open ended question):			
	- Toy: Category / Brand / IP (open-ended question) - Price that was / will be paid for the product? - Toys were assigned to three price categories on the analysis: < € 30 / €30-70 / > € 70	- For each of (up to) three toys: - Who gave the idea to buy the toy (was it requested by the child)? - Touch point for 1st contact with the toy? - When did this happen? - Is it the first toy from the brand?	- For each of (up to) three toys: - Used touch points / sources to collect information about this specific toy? - Most relevant / decisive touch point / source for the decision for this toy? - Relevance of touch points / sources to collect information about toys in general - Frequency of usage - Impact for the decision making	- If the (up to three) toys were bought already: - Where was the toy bought? - When was the toy bought? - Reasons for buying the toy there? - If the (up to three) toys were not bought yet: - Where will the toy be bought?
Children aged 7-12 years	For up to 3 toys from the wish list (open ended question):			
	- Toy: Category / Brand / IP (open-ended question) - Price of the toy - Toys were assigned to three price categories on the analysis: < € 30 / €30-70 / > € 70	- For each of (up to) three toys on the wish list: - Touch point for 1st contact with the toy? - When did this happen? - Is it the first toy from the brand?	- For each of (up to) three toys: - Used touch points / sources to collect information about this specific toy? - Most relevant / decisive touch point / source for the decision for this toy? - Relevance of touch points / sources to collect information about toys in general - Frequency of usage - Impact for the decision making	- Did the child create a wishlist for Christmas? - When was the wishlist put together?

The **Center Piece** of the Analysis:

We 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:

- **Age** of the child
- **Gender** of the child
- **Trend Comparison to 2023 for Germany and France** (total)

+

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 ...
(NB: base must be at least n = 30)

- **Category** – with focus on your brand and close competition
- **Brand**

This is what you get:

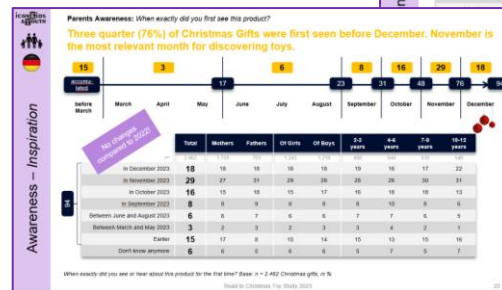
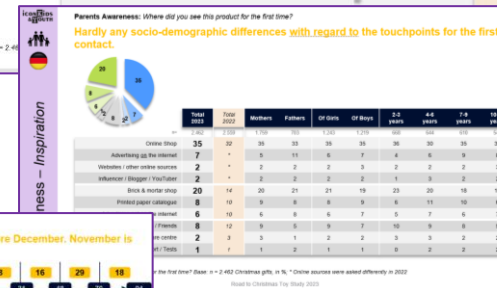
Awareness: The touch points that inspired Christmas gifting.

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 2024 study)

This is what you get:

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

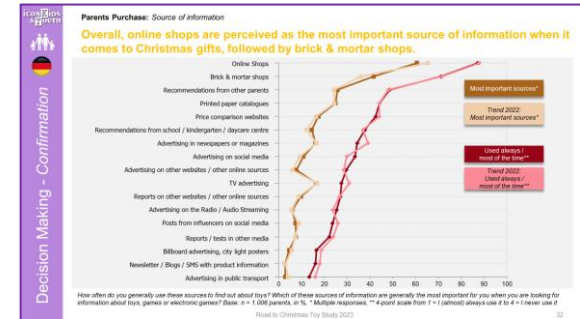
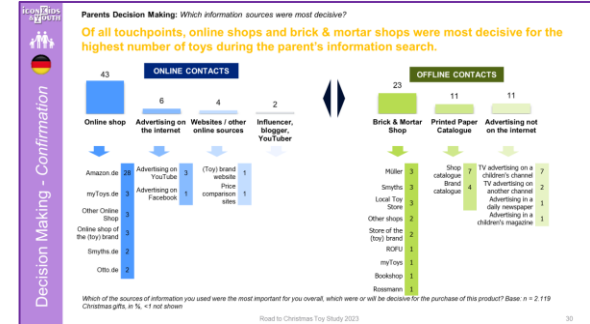
Stage 2:
Decision making

- **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:

- Slides for sample total and subgroups based on age & gender of the child
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(Slides from the 2024 study)

This is what you get:

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

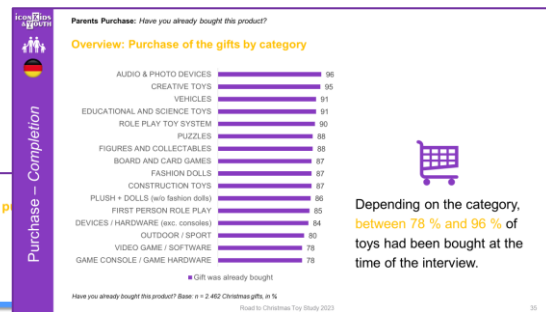
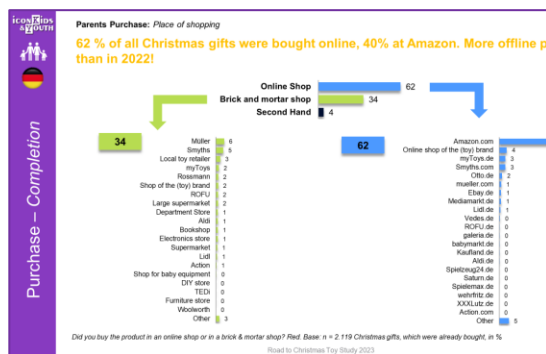
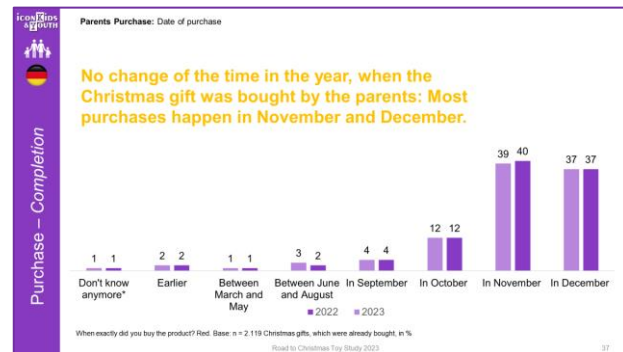
Stage 3:
Purchase

(NB: Parents only!)

- **Where** was the specific toy bought / where will it be bought?
(Detailed list of online and brick & mortar stores)
- **Why** was the toy bought in that store?
(Detailed list of purchase drivers, including promotions such as Black Friday)
- If purchased already at the time of research (in 2023 86 % in Germany and 77 % in France!): **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



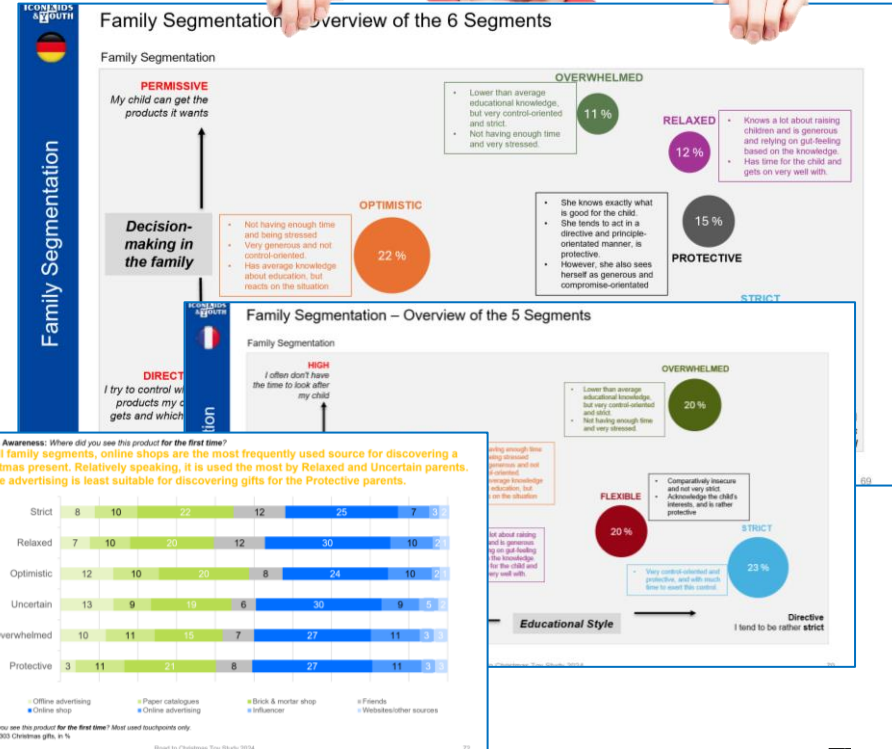
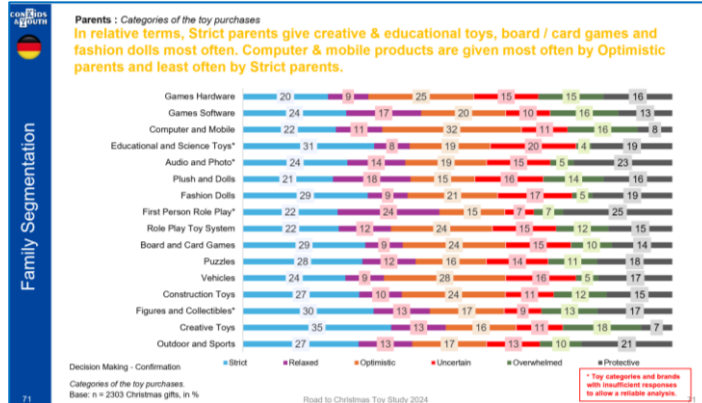
(Slides from the 2024 study)

This is what you get:

Family Segmentation – Who buys your category and how?

A comprehension analysis of families based on their parenting styles and decision making:

- Separate description of **parent segments** for Germany and France
- Purchase of **toy categories** by parent segments
- **Touch Points** used by the parents of each segments to discover Christmas gifts.
- **Purchase offline or online**





The Proposal

Study factsheet,
costs and timing

Study Factsheet

Markets:	France & Germany
Methodology:	Quantitative online survey Fieldwork: w/c December 15, 2025 • Age 2 – 6 years: Only the parent is interviewed • Age 7 – 12 years: Both parent and child are interviewed (parent first, child second)
Sample:	 n = 1000 parents of children aged 2 – 12 years n = 500 children aged 7 – 12 years  n = 1000 parents of children aged 2 – 12 years and n = 500 children aged 7 – 12 years <i>Online representative, quota are set on age & gender of the child, regional spread, social grade)</i>
Questionnaire:	Standardized questionnaire, mobile-friendly
Reporting:	PowerPoint report and Excel tables Presentation on request



The Proposal – Costs and Timing

Costs:

Reports per market:

Study Report: € 4,500.--

Includes full PowerPoint report and complete Excel tables

Customized report per brand / category: € 1,800.--

Only in combination with purchase of the study report

Customized online presentation: € 800.--

Only in combination with purchase of the study report

Early bird: Save 10 % when ordering before November 14, 2025*!

Timing:

Delivery of the **study report:** **February 2026**

Delivery of **customized reports** **March 2026**

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.

* To take advantage of the Early Bird discount, payment must be made without deductions immediately after placing the order.

