

New in 2026:
Kidults!

Road to Christmas Toy Study 2026

 Germany  France

*The journey from awareness to purchase:
How your products find their place
under the Christmas tree*

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The 2026 edition of our unique study:

- The most comprehensive analysis of the toy buying process before Christmas
- Thousands of toy purchases explored in every detail.
- **AND:** For the first time we are covering **Kidults** as THE growth sector in the toy market.



All results are analyzed per product category – you’ll get exactly the data that is vital for your business.

Categories from the 2025 study:

Games Hardware	Board and Card Games
Games Software	Puzzles
Computer and mobile	Vehicles
Educational and Science Toys	Construction Toys
Audio and Photo	Figures and Collectibles
Plush and Dolls	Creative Toys / Arts & Crafts
Fashion Dolls	Outdoor and Sports
Firsts Person Role Play Toys	Other Toys
Role Play Toy Systems	

Study Content Parents and Children:

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 for 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 for 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?

Parents and children: 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 2025 for Germany and France** (total)

+

Included: Results 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 4)
- Most mentioned **toy brands and IPs**, i.e. 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: Parents & children

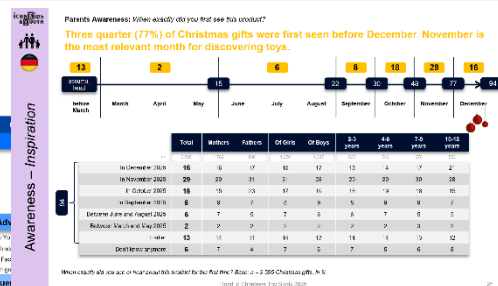
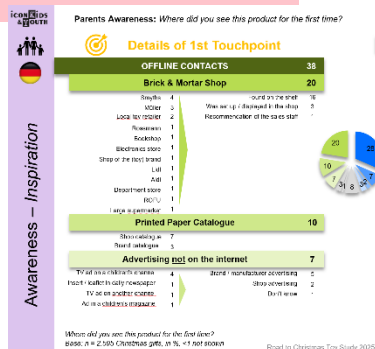
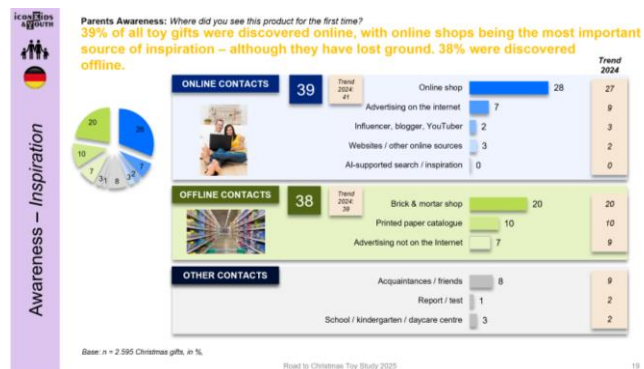
Awareness: The touch points that inspired Christmas gifting.

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:

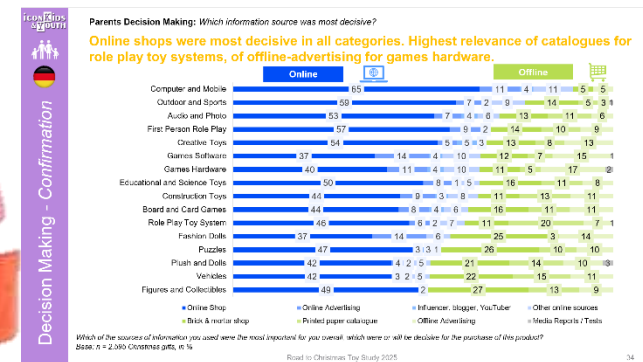
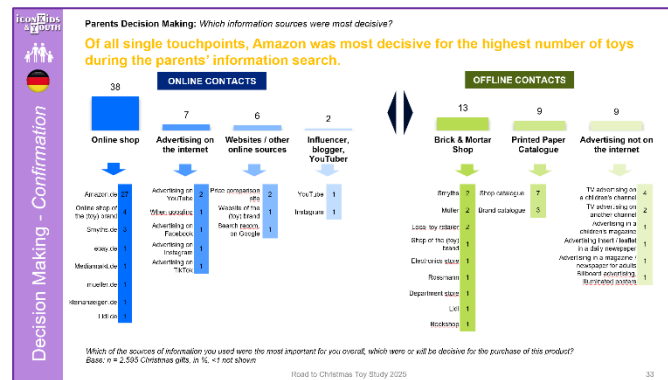
- Analysis per toy / game category (2025: 16 separate categories!)
- Sample total and subgroups based on age & gender of the child
- Detailed numbers for
 - Price point (low / middle / high)
 - First or repeat purchase
 - Product categories with at least 30 purchases
 - Brands and IPs with at least 30 purchases



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

- **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**

- Slides for sample total and subgroups based on age & gender of the child
- Detailed 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 2025 study)

This is what you get: Parents & children

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

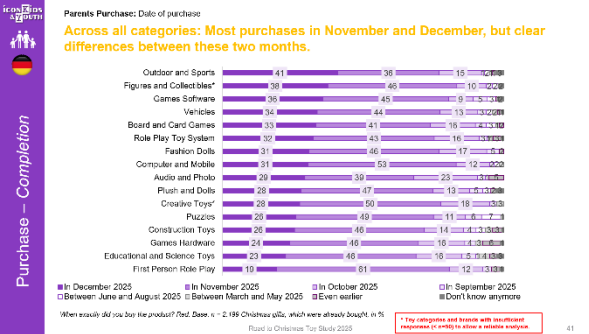
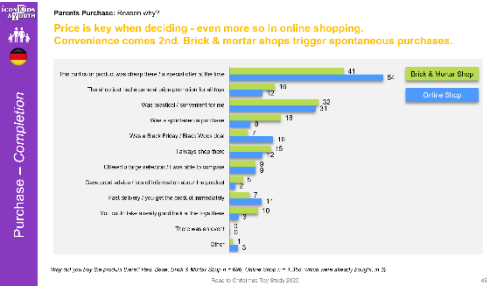
Stage 3: Purchase (NB: Parents only!)

- **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 2025 85 % in Germany and 80 % 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
- Detailed 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



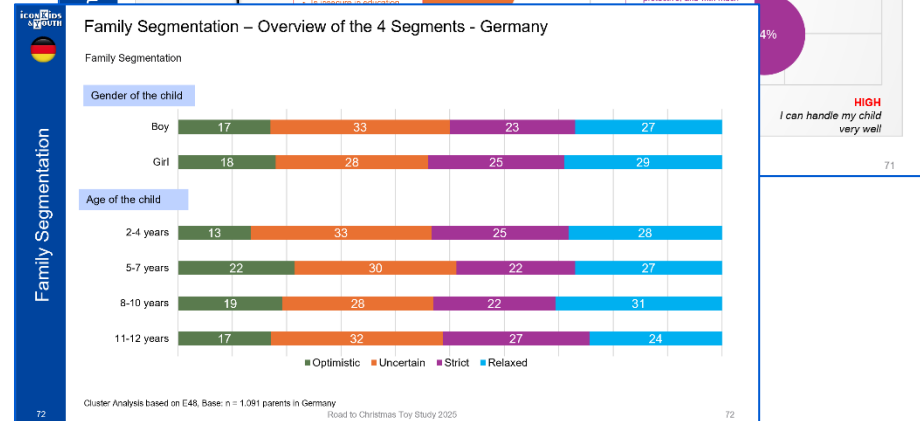
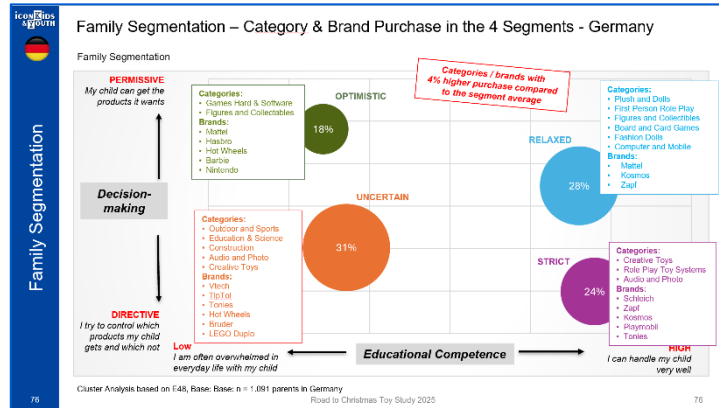
(Slides from the 2025 study)

This is what you get: Parents & children

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**

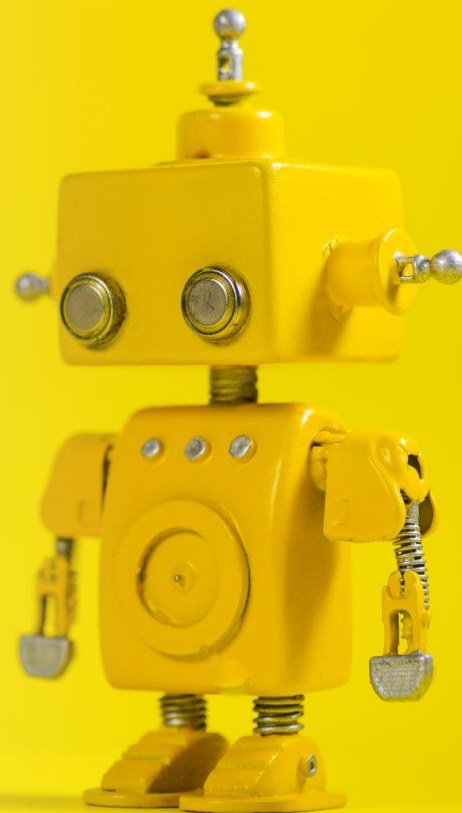


(Slides from the 2025 study)

New in 2026: Kidults (optional!)

How are Gifts for adult fans of toys & games bought?

Who?	• Gift-givers: Adults aged 18-60 years who have bought / will buy a toy or game for another adult aged 18+ years as Christmas gift in 2026 • Gift-recipients: Adults aged 18-60 years who have wished for a toy or game as Christmas gift in 2026
How?	The questionnaire uses the same comprehensive toy & game categories and complete lists for touch points / retailers that are used for the family sample
The details of the gift(s) (For up to 3 products that were / will be bought)	• Gift-giver: Who is the recipient of the gift – friend, partner, sibling, parent, other relative, colleague, other? (Covered gifts may be for different recipients) • What is it – open-ended question will be coded, analysis based on the toy & game categories. • Price of the product?
Stage 1: Awareness	• Where did they see the product for the first time? • When did they see the product for the first time? • Who came up with the idea to buy this product?
Stage 2: Decision making	• Where else did they find additional information about the product? • Which information source was decisive?
Stage 3: Purchase (only gift-giver)	• If bought already: When was the product bought? Where was it bought? Why was the product bought there? • If not bought yet: Where will it be bought?





The Proposal

Study factsheet,
costs and timing

Study Factsheet

Markets:

France & Germany

Methodology:

Quantitative online survey with standardized questionnaire, mobile-friendly

Fieldwork: w/c December 14, 2026

Sample:

Family-Market 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

n = 500 children aged 7 – 12 years

- **Age 2 – 6 years:** Only the **parent** is interviewed
- **Age 7 – 12 years:** Both **parent** and **child** are interviewed (parent first, child second)

Quota are set on age & gender of the child

Kidults-Market Sample:



n = 400 gift-givers aged 18 – 60 years

n = 400 gift-recipients aged 18 – 60 years



n = 400 gift-givers aged 18 – 60 years

n = 400 gift-recipients aged 18 – 60 years

(no additional quota set)

Reporting:

PowerPoint report

Presentation on request

iconkids
& youth

The Proposal – Costs and Timing

Costs:

Reports per country:

Report Family Market: € 4,500.--

n = 1000 parents and n = 500 children

Report Kidults Market: € 4,000.--

n = 400 gift-givers and n = 400 gift recipients

Customized report per brand / category and market: € 1,500.--

Only in combination with purchase of the related report

Customized online presentation: € 800.--

Only in combination with purchase of the study report

Early bird: Save 10 % when ordering before November 20, 2026*!

Timing:

Delivery of the **study report:** **Early February 2027**

Delivery of **customized reports** **End of February 2027**

The offer is non-binding.

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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.**

Ask us for multi-market /
multi-report discount!

