

Toys, in the eyes of the responsible shopper

Attitudes toward the toy industry and consumer concerns in the US, GB, Germany, and France



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Living Consumer Intelligence | business.yougov.com

- 01** The data behind this study
- 02** Key Findings
- 03** Who are the toy buyers
- 04** The purpose of toys
- 05** Morality when buying toys
- 06** The significance of sustainability
- 07** Expectations from the green consumers
- 08** Sustainable toy buyers
- 09** How to reach potential toy buyers

 **What's Inside**

The data behind this study



**Online survey of
YouGov's panel**



National representative
sample of adults (aged 18+)

US N = 2,351

UK N = 2,148

Germany N = 2,153

France N = 2,203



Fieldwork:

25.10.2022 – 31.10.2022

Toys, in the eyes of the responsible shopper

The study explores the attitudes of toy buyers towards the toy industry, looking at moral and ethical concerns that consumers may have when purchasing toys.

Methodology

The insights in this report are drawn from more than 8,000 interviews with consumers in the US, UK, France, and Germany. Each country uses a nationally representative sample, with all respondents drawn from YouGov's panel of 20m members. All interviews were completed online.

We then connected this research to our global connected dataset, allowing us to merge our respondents and their answers to the 1 million consumer attributes we collect on an ongoing basis for audience segmentation and profiling.

The Ethical buyer

The purpose of this study is to understand better the importance of moral and ethical considerations among toy buyers.

Such issues range from environmental concerns to what toys teach our children about our society and the role of toys.

The report focuses on those that buy toys across the US, UK, France, and Germany, showing broad brush themes and country-specific findings that industry stakeholders can put into action.

Key Findings

Difficult balancing act

- Toy manufacturers have a tricky balancing act between contrasting consumer ethical and moral demands
- Demands from shoppers are diverse, and each has its moral code, whether around sustainability, pricing, or toy suitability.
- Rather than try to please all buyers all the time, manufacturers will be better placed sticking to good basic ethical standards and then ensure individual toys match different consumers' requirements

Morality when buying toys

- In the US, there are general morality concerns, particularly around promoting toys to kids. In France, there is more concern about adult themes in toys.
- In DE and the UK, the top reason for not buying a toy is being immorally priced, e.g., low entry but high ongoing cost.
- A sizeable minority (over one-third) of toy shoppers want to see overt support for D&I issues, but over a quarter do not
- Shoppers who prioritize fun are less interested in moral/ethical concerns

Sustainability & Recycling

- Very few toy buyers think major toy companies prioritize sustainability or are doing well at becoming more sustainable.
- Two-thirds of frequent buyers claim to have recyclability or sustainability requirements when buying toys. Just under half of them use labeling as a navigation tool.
- Despite the importance of sustainability and recycling, almost half of all buyers admit they sometimes buy toys that do not meet these requirements.

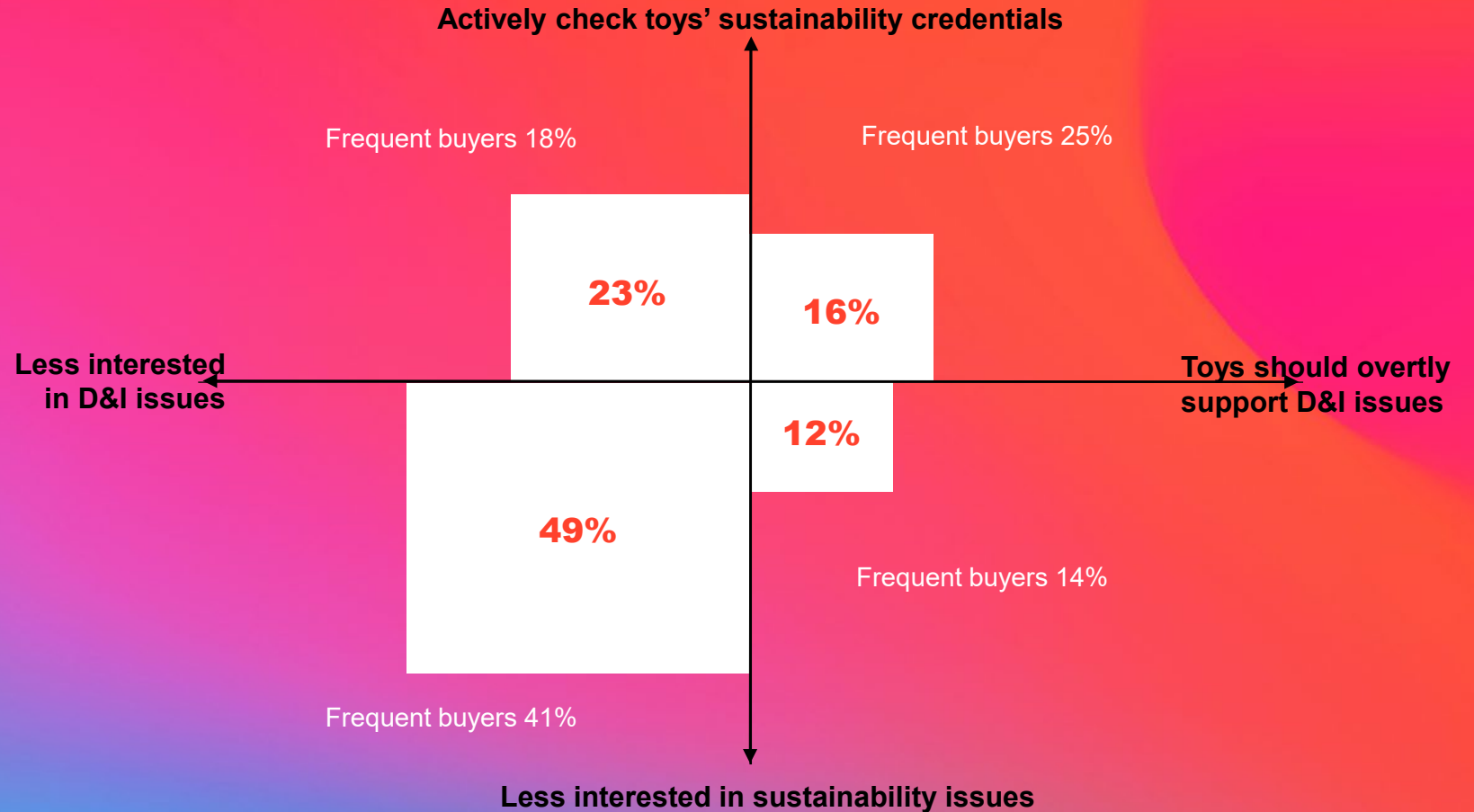
Summarising issues

We can broadly segment toy buyers based on whether they actively care about sustainability (check labels for sustainability claims when buying toys) and whether they agree they want toys to support D&I issues overtly.

Half of the toy shoppers (49%) have limited or no interest in both issues, while 16% do care about both.

Frequent toy buyers care more, with a quarter caring about both issues (25%). In total, 43% of frequent buyers check labels for sustainability claims, while 39% feel toys should overtly support D&I issues.

Summarising toy shoppers' demands



Who are the toy buyers



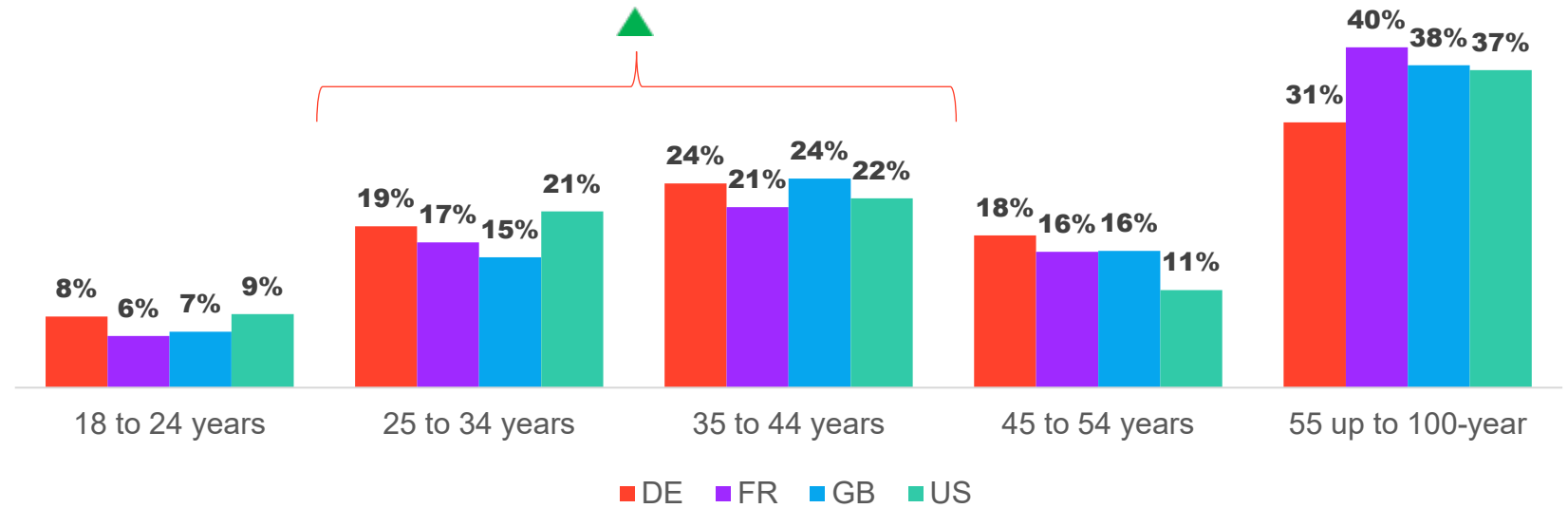
There are no surprises regarding the age of toy buyers, or that they are more likely to be women.

Where do toy buyers differ from the nation?

Toy buyers who *buy toys for children at least once a year* are more likely to be female, especially in the UK.

They are also skewed towards parents aged 25-44, but many are older grandparents and carers, with around a third aged 55+.

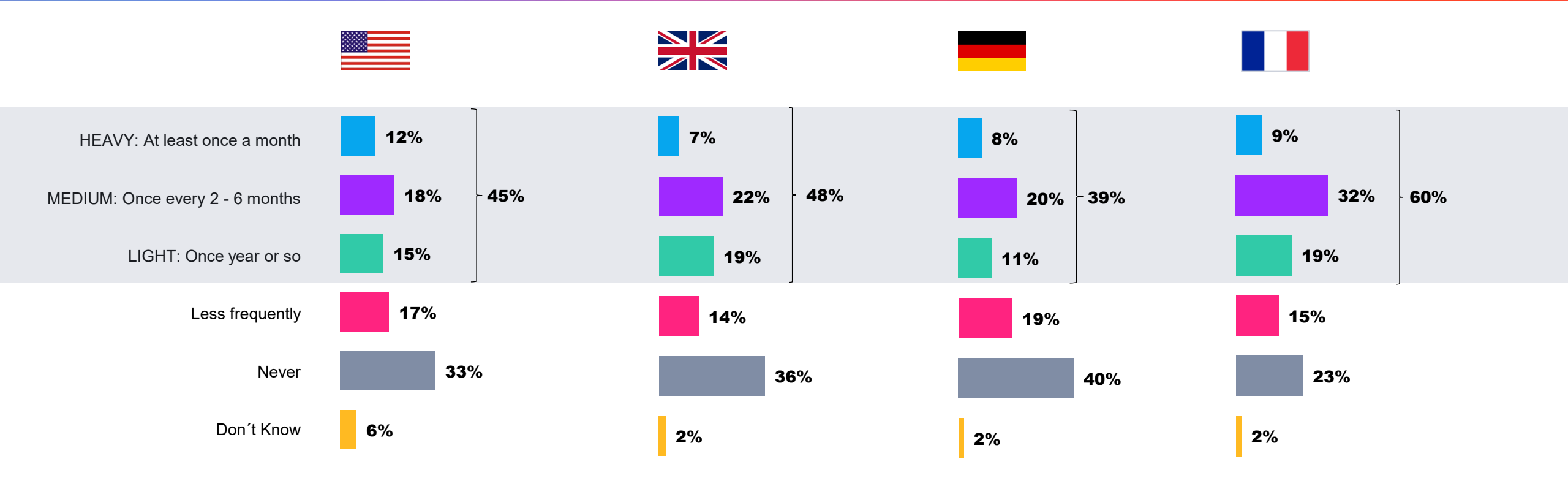
German toy buyers tend to be younger and more evenly balanced by gender.



Gender				
Female	53%	55%	58%	56%
Male	47%	45%	42%	44%

Parent/Guardian of child under 18				
Yes	40%	41%	35%	37%

In France, 3 out of 5 consumers make at least one toy purchase a year, while in Germany it is less than 2 in 5



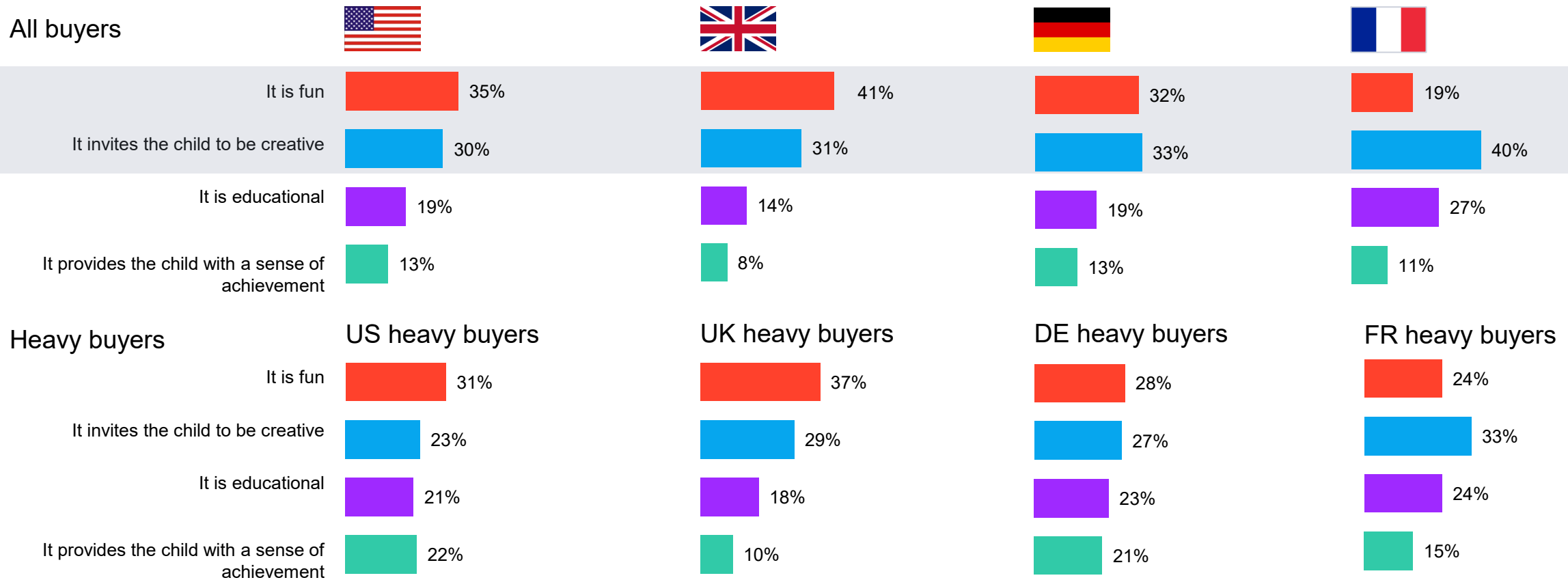
In the US and UK, men and women make up an equal share of Heavy buyers, while in DE men are slightly more likely to be Heavy buyers than women. In France it is the other way around.

Question: How often do you typically buy toys for children?
 Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01.2022. Base: US n = 2351, UK n = 2148, DE n = 2153, FR n = 2203

The purpose of toys

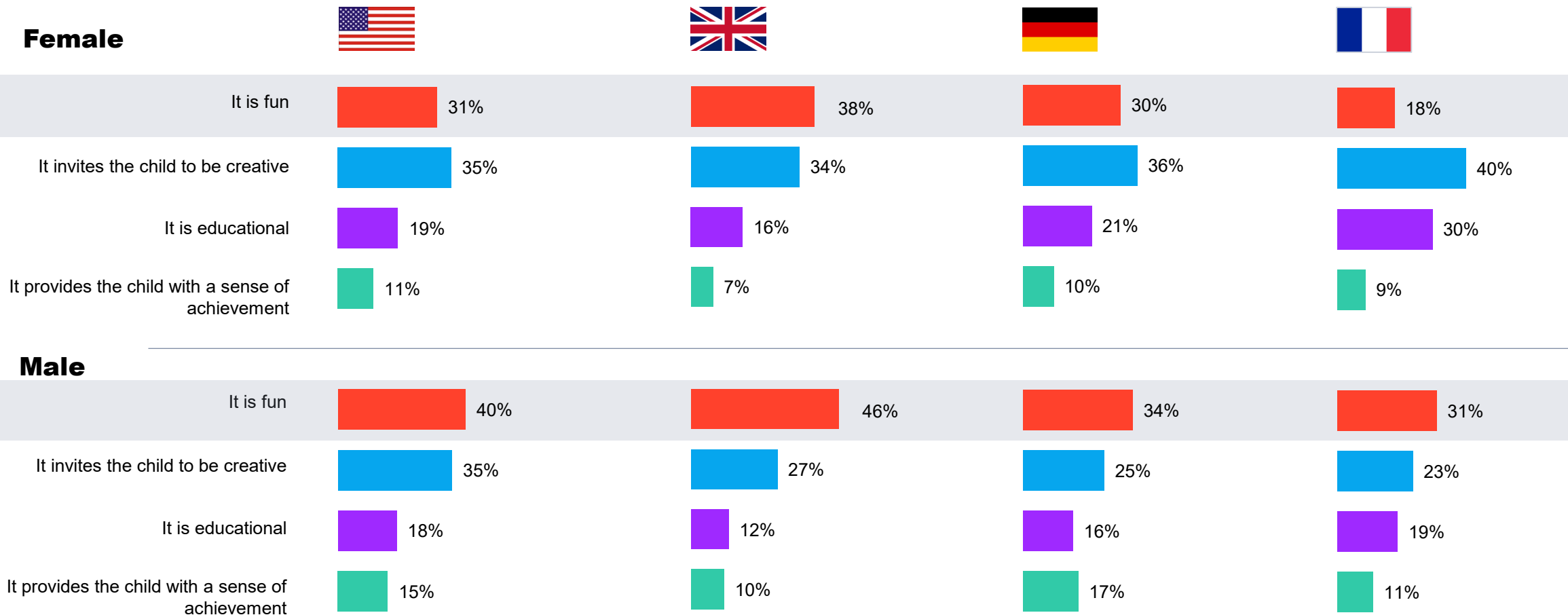


Asked to pick a single priority, buyers focus on toys being Fun and Creative. French shoppers prioritise the Creative and Educational elements, while US and UK buyers put Fun first. Heavy buyers are slightly more balanced with Sense of Achievement over-indexing.



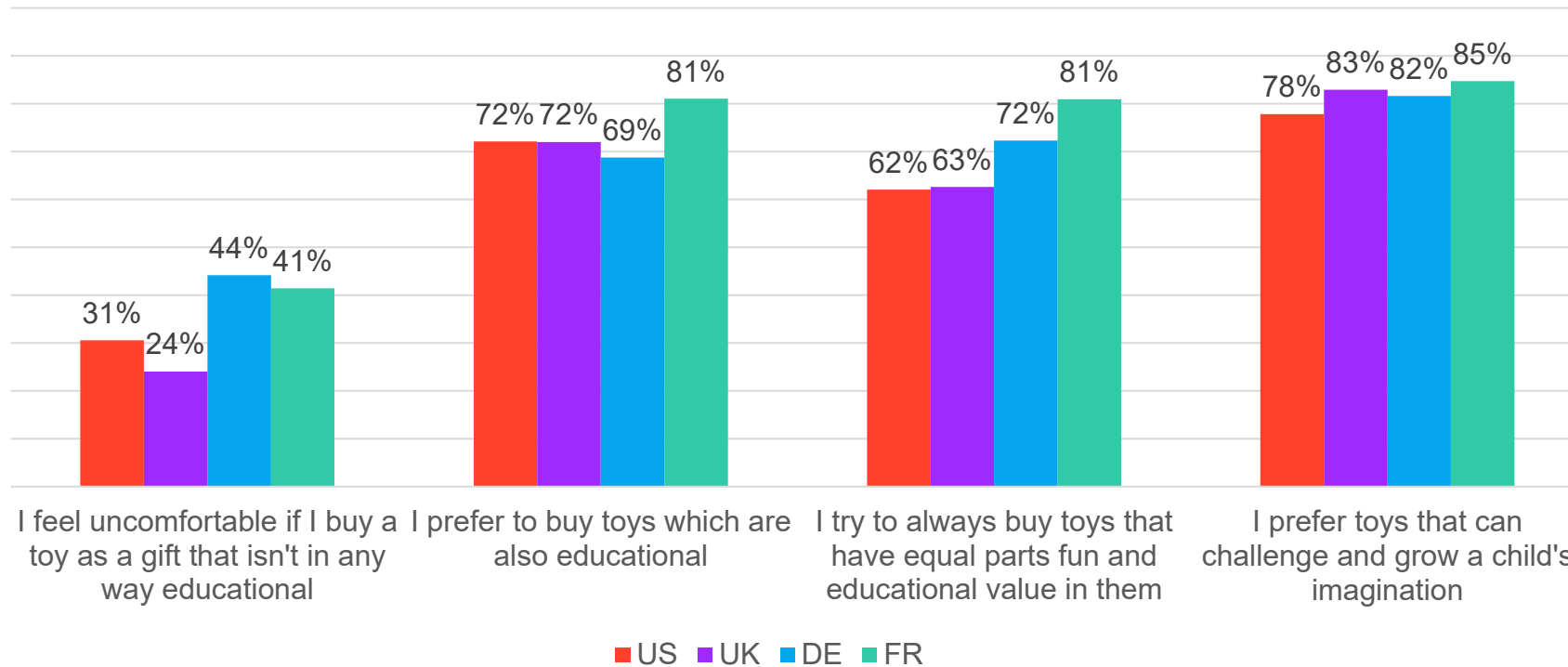
Question: Which one of these is most important to you when buying a new toy? You may prefer toys that combine several of these but please try to pick the one that is generally most important to you.
 Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01.2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327

In all countries except the US, women are far more likely than men to want Creative toys, while men tend to prioritise Fun (particularly in the UK). French women, in particular, deprioritise Fun and over-index Creativity and Education.



Question: Which one of these is most important to you when buying a new toy? You may prefer toys that combine several of these but please try to pick the one that is generally most important to you.
 Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01.2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327

Most buyers are not looking for a single utility from toys with a majority saying they want to balance fun and education. Over three quarters want to challenge and grow imagination. A significant minority, over 2 in 5 in Germany and France, have concerns about gifting toys without any educational value.



Discomfort with gifting

Discomfort with gifting toys that aren't educational is evenly split across genders and age groups, though grandparents in Germany are particularly concerned.

Higher concern is also shown by heavier buyers (41%), those who check for toy sustainability (50%), and those who want toys to provide overt support for diversity and inclusion issues (48%).

Question: Do you agree or disagree with the following?
 Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01.2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327, Strongly agree/ Slightly agree

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Morality when buying toys



Toy buyers want a middle way for diversity and inclusion issues – only a minority want to see either traditional family values or overt D&I support. UK buyers are most in favour of traditional values.

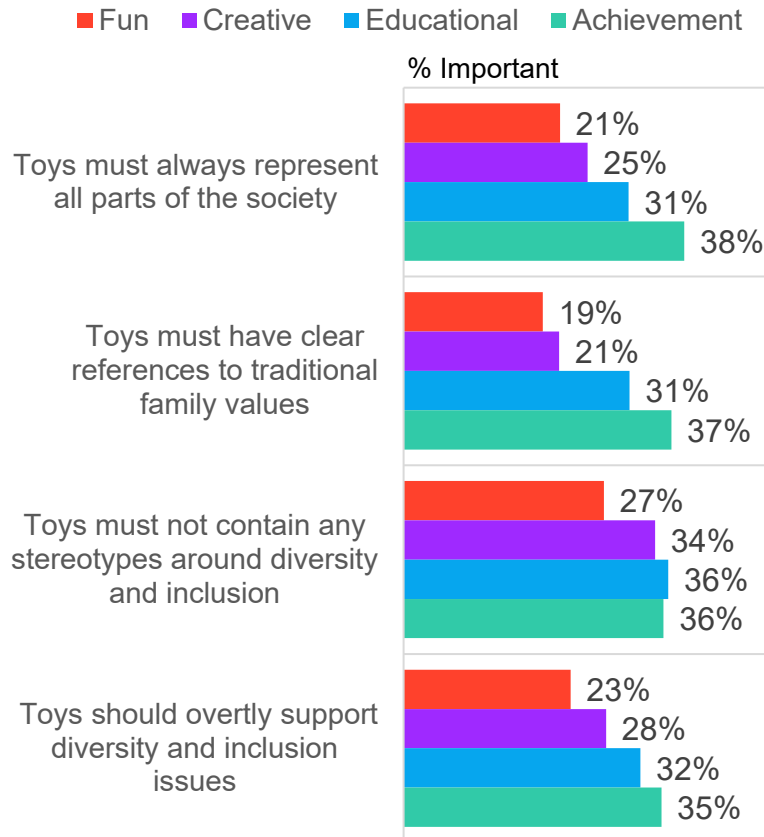
	US		UK		DE		FR	
	Important	Not important	Important	Not important	Important	Not important	Important	Not important
Toys must always represent all parts of the society	40%	30%	45%	24%	40%	23%	19%	27%
Toys must have clear references to traditional family values	40%	33%	59%	11%	43%	23%	40%	27%
Toys must not contain any stereotypes around diversity and inclusion	34%	39%	41%	28%	38%	26%	27%	33%
Toys should overtly support diversity and inclusion issues	38%	35%	39%	27%	31%	25%	36%	23%

Question: Agree with statement about toys.

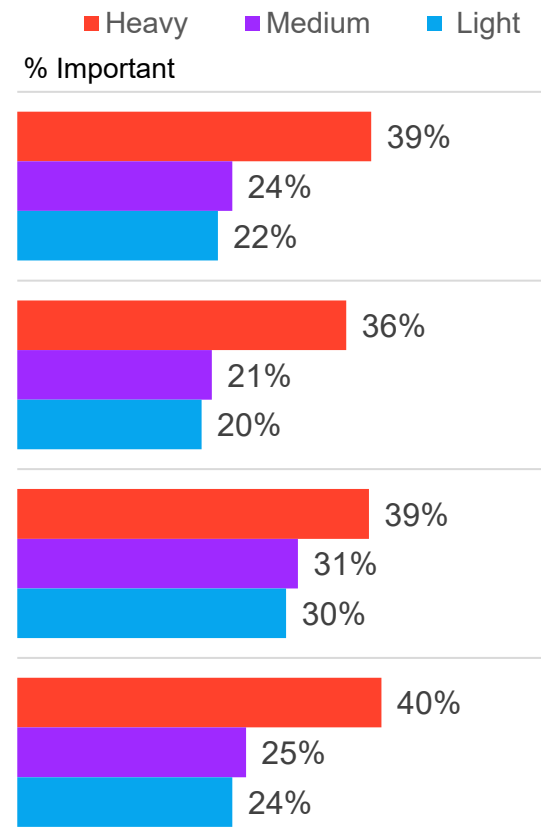
Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01. 2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327,

Heavy toy buyers are far more likely to agree with these statements, as do younger buyers. Those buying for 'fun' (who bias male and British) are less engaged.

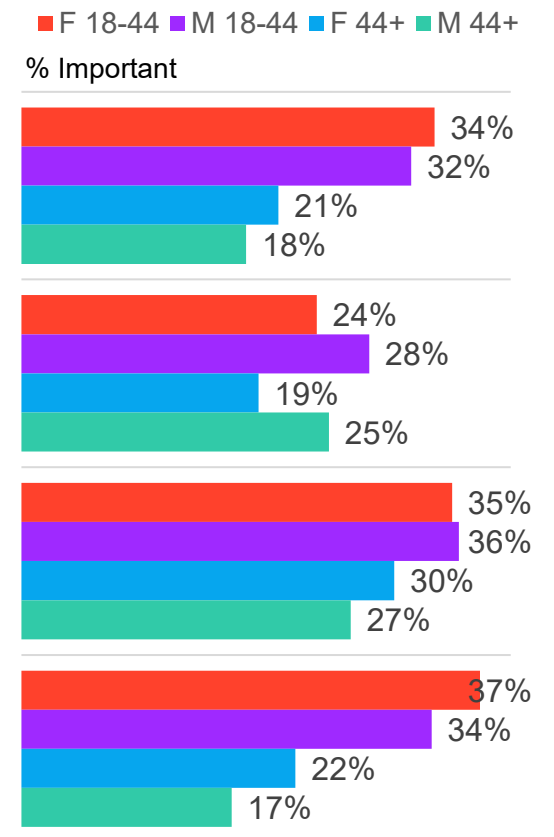
Diversity & Inclusion by Toy Type



Diversity & Inclusion by Buying Frequency



Diversity & Inclusion by Age & Gender



Question: To what extent are the following important to you? Question: Which one of these is most important to you when buying a new toy?
 Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01.2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327, To a great extent/To a very great extent

Responsible behaviour

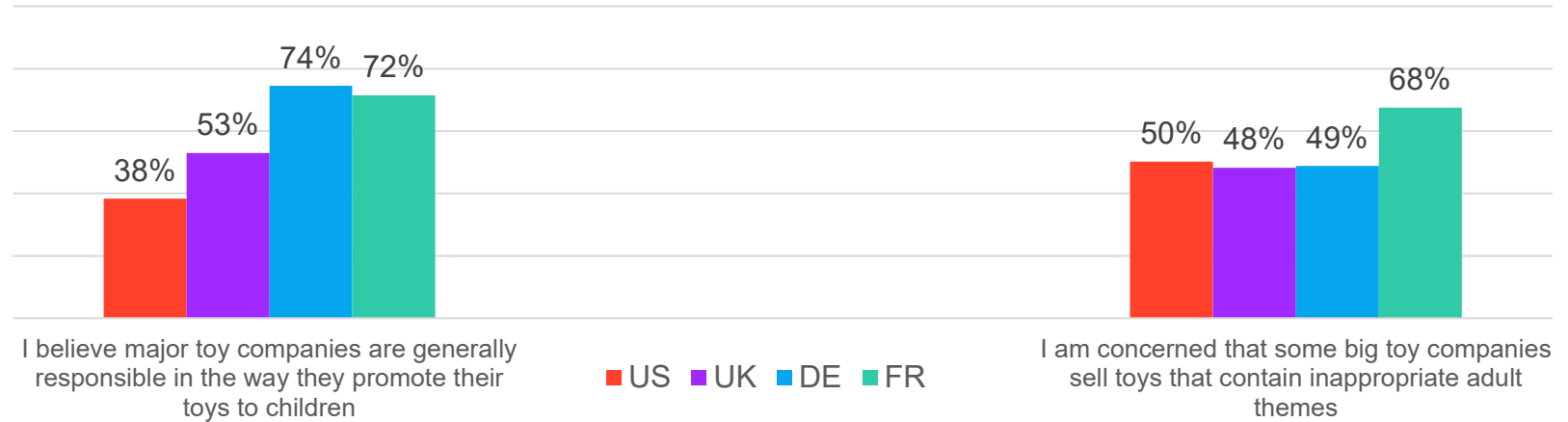
Toy shoppers in Germany and France are positive about toy companies exhibiting responsible behaviour in how toys are promoted, but US buyers are not.

French buyers are more concerned than others about inappropriate adult themes in toys.

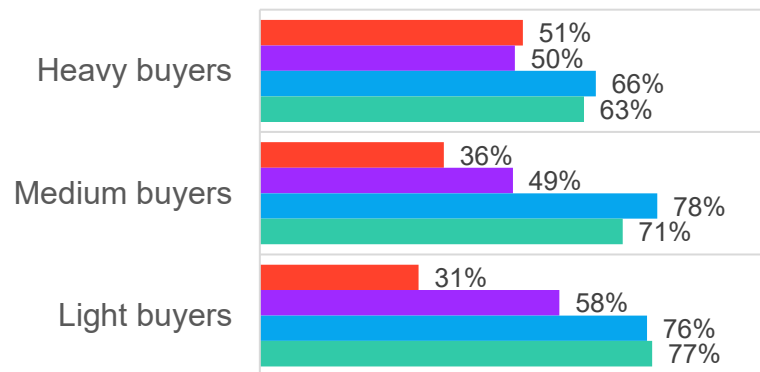
Question: Do you agree or disagree with the following?

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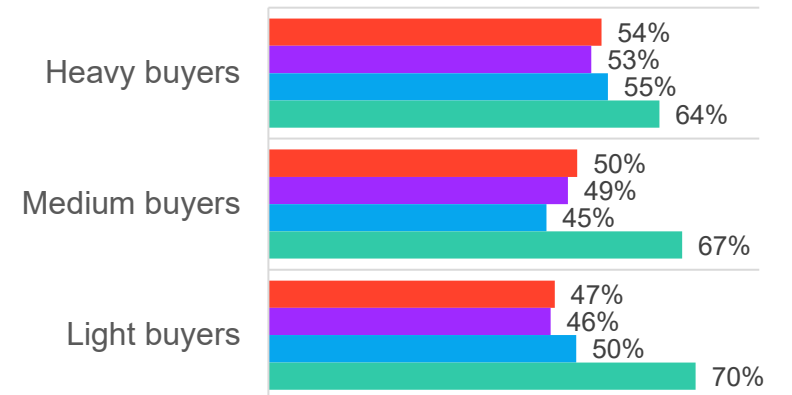
The responsibility of major toy companies



Medium and Light buyers in DE & FR place most responsibility on companies



Concern is relatively even by buyer frequency



Age limits

Around a third of US and UK toy buyers are unconcerned about age limits on video games, falling to under a quarter in Germany and France.

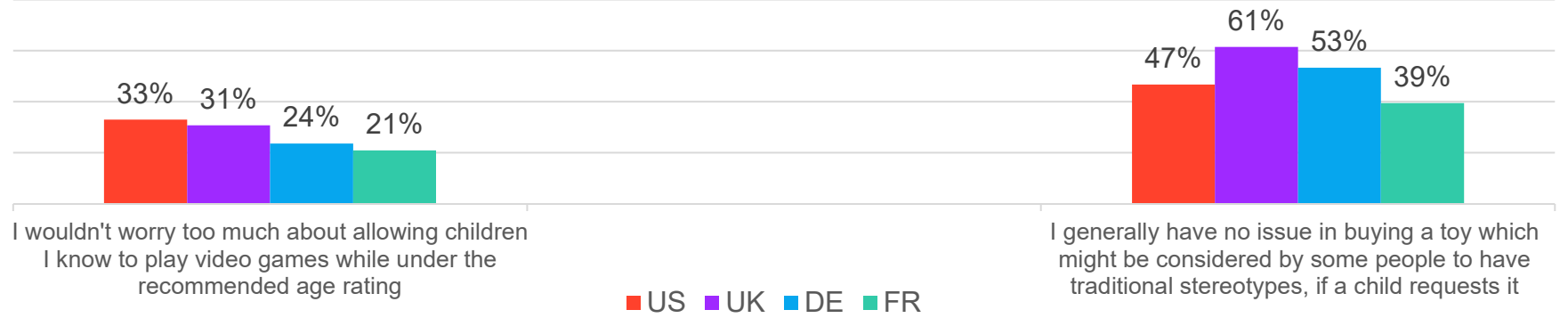
Meanwhile, reality bites half of all shoppers who will buy what a child wants, even if it includes traditional stereotypes.

Younger and heavier buyers are less worried about age ratings on video games than older buyers. Male buyers are more likely to agree than female (33% vs. 22%). Younger buyers are slightly less likely to claim they would buy a toy with traditional stereotypes even if a child wants it, but even half (49%) of those who believe toys should overtly support D&I issues agree.

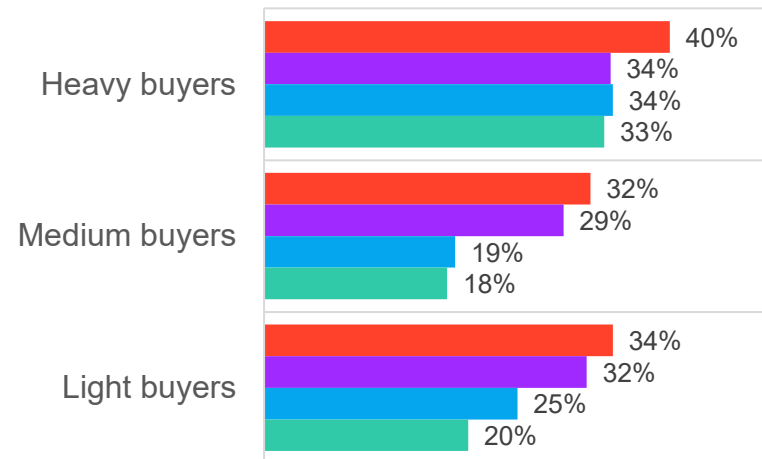
Question: Do you agree or disagree with the following?

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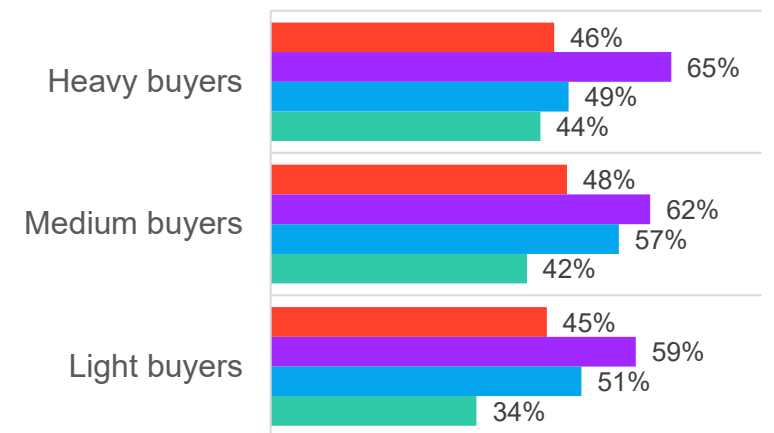
High morale of toy buyers



Heavy buyers tend to worry less



Heavy buyers in UK have the fewest concerns



60% of shoppers have been put off buying a particular toy or become concerned about a toy in the past year for at least one moral or ethical reason. General morality concerns, adult themes, and immoral pricing are the top three concerns.

Moral concerns given as reason for not buying a particular toy in the last year		All shoppers	US	UK	DE	FR
Rank from most to least important service	Concerns about its morality	24%	24%	13%	22%	32%
	Concerns about adult themes or imagery	21%	22%	15%	11%	31%
	The toy is immorally priced e.g. low entry cost but high on-going cost	19%	17%	18%	25%	17%
	The toy might be manufactured using excessively low paid/child labour	16%	12%	14%	13%	22%
	The toy might become addictive	15%	12%	10%	13%	23%
	The toy is manufactured in a country you don't wish to buy from	14%	13%	11%	14%	17%
	Inappropriateness of the toy in modern society	13%	16%	6%	16%	13%
	Manufactured using unsustainable products	12%	13%	8%	12%	14%
	The toy is non-recyclable and unsustainable	10%	8%	10%	10%	13%
	The toy is too gender-stereotyped	10%	10%	10%	7%	12%
	The packaging is non-recyclable, unsustainable or excessive	10%	9%	10%	9%	11%
	The toy is too racially-stereotyped	7%	9%	5%	4%	9%
Any of these or any other reason	60%	60%	47%	63%	69%	
No, I have not	34%	32%	47%	32%	27%	

Question: In the last year or so have you decided not to buy a toy, or become concerned about a toy, for any of the following reasons
 Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01. 2022. Base: US n = 1060, GB n = 1021 DE n = 860, FR n = 1327

Concerns for Heavy, Medium and Light buyers

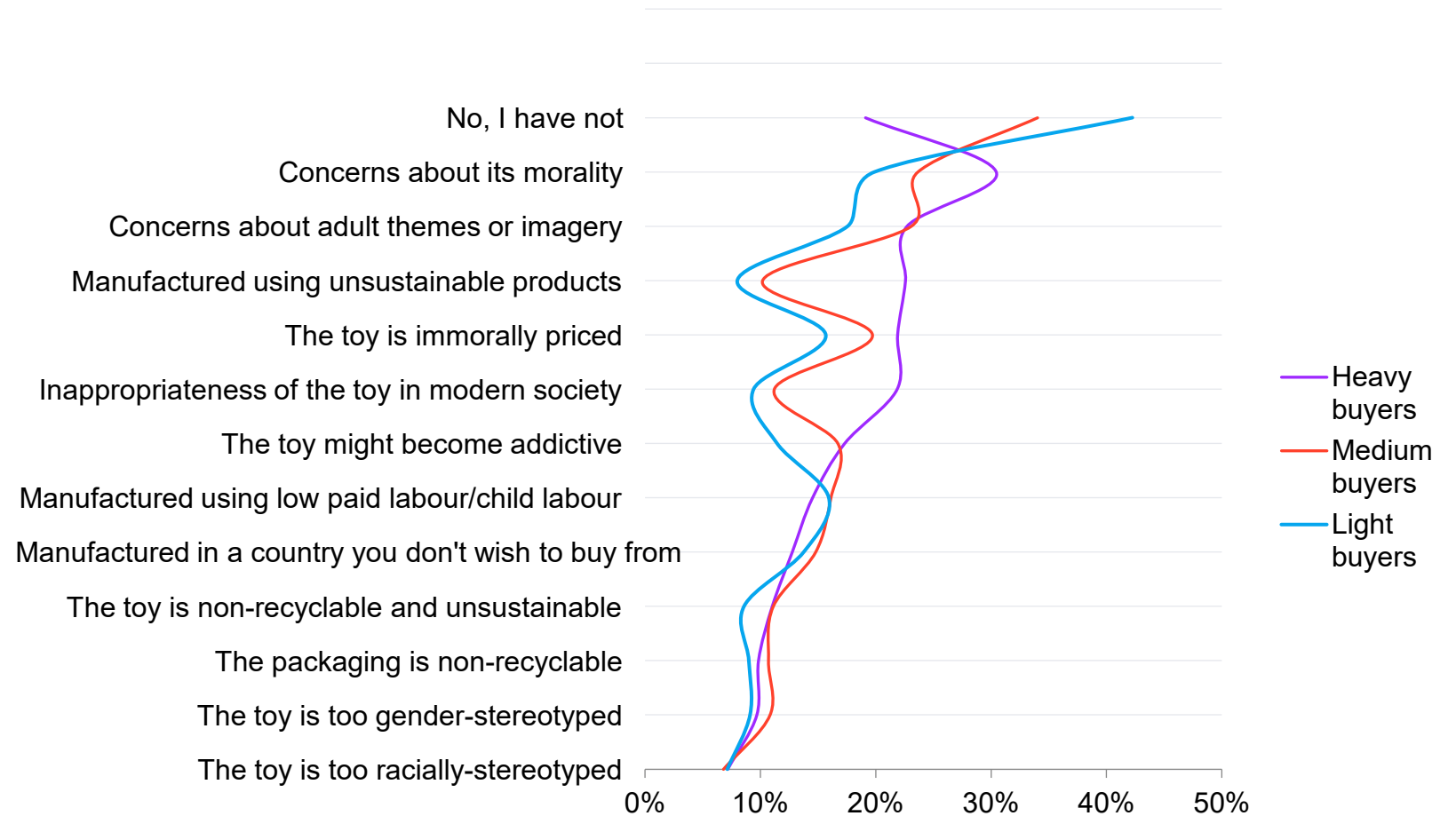
Medium and light buyers are very similar regarding almost the reasons for not having to buy a toy.

However, the Medium buyer is slightly more concerned with adult themes and addictiveness.

Question: In the last year or so have you decided not to buy a toy, or become concerned about a toy, for any of the following reasons

Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01.2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327

Across countries, heavy buyers are more likely to not buy a toy based on moral concerns, adult themes or immoral pricing.



Concerns about purpose

The toy buyers who prefer a toy's purpose to be Educational or Creative have the greatest moral and ethical concerns when buying toys.

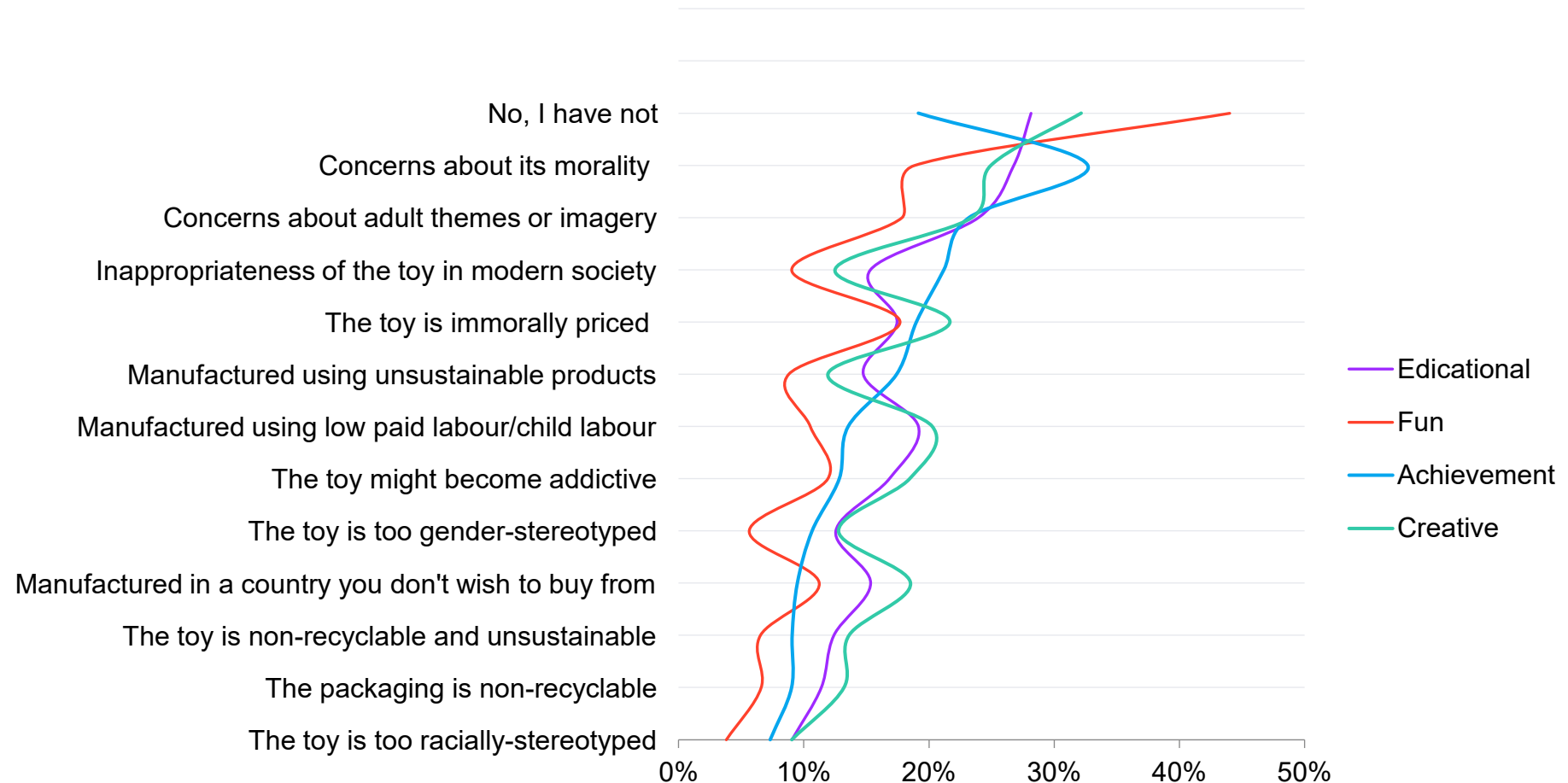
The exception, however, is reasons such as concerns about morality and Inappropriateness of the toy in modern society, where it is the toy buyers who prefer the toy's purpose to be Achievement who select these reasons.

Question: In the last year or so have you decided not to buy a toy, or become concerned about a toy, for any of the following reasons

Question: Which one of these is most important to you when buying a new toy?

Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.1.2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327

Across countries, those who buy toys for being 'fun' are least likely to have had concerns about a toy's purpose. Those looking for 'achievement' are most likely to have been worried, particularly around morality and adult themes/imagery.



The significance of sustainability



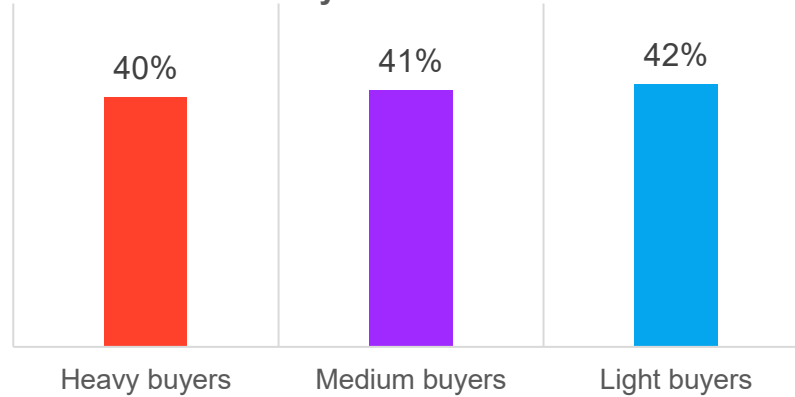
Sustainable production

Across countries, few people agree that toy companies prioritise sustainable production or are doing well at becoming more sustainable (14% & 21%).

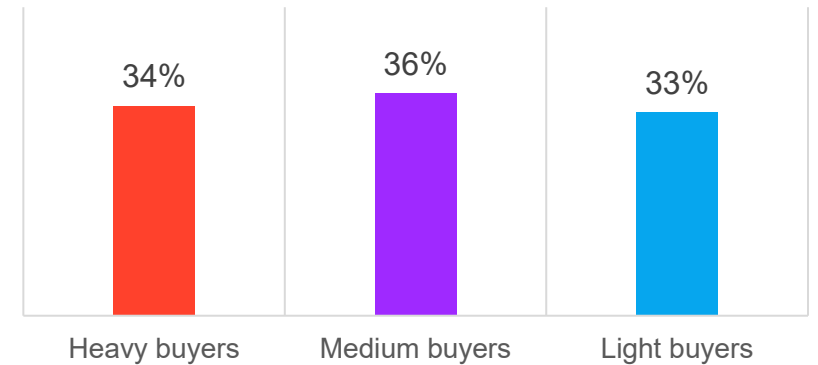
Skepticism is relatively similar across toy buyers by age and gender.

Question: To what extent do you think toy companies prioritise producing their products sustainably? How well or poorly do you feel major toy companies are doing at becoming more sustainable? Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01.2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327, Not at all/To a small extent

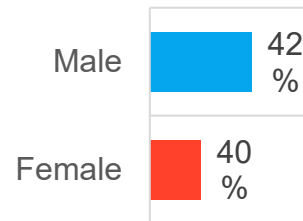
2 in 5 say toy companies either don't prioritise producing sustainable products at all or only to a small extent



A third of buyers say major toy companies are doing very or somewhat poorly at becoming more sustainable

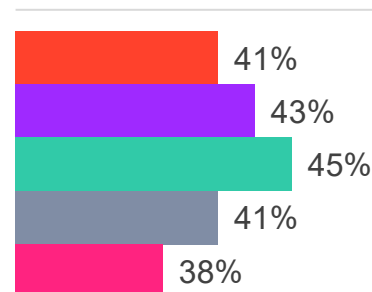


Male & Female are equally sceptical



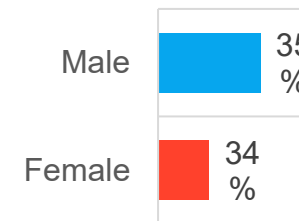
■ Male ■ Female

Scepticism is greatest among 34-44s



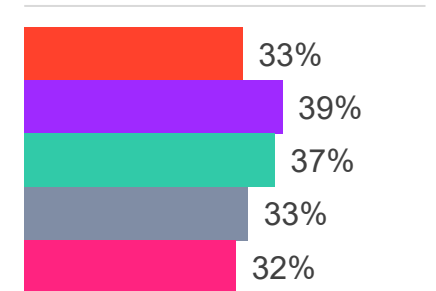
■ 18-24 ■ 25-34 ■ 35-44
■ 45-54 ■ 55+

Male & Female are equally sceptical



■ Male ■ Female

Scepticism is greatest among 25-34s

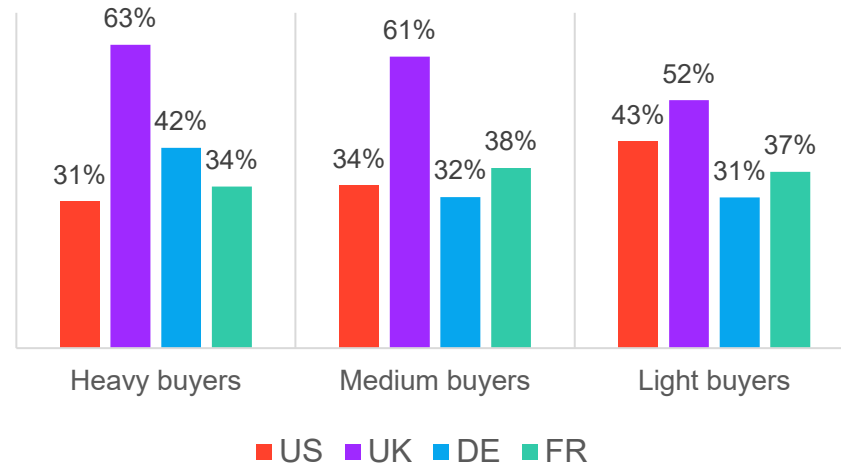


■ 18-24 ■ 25-34 ■ 35-44
■ 45-54 ■ 55+

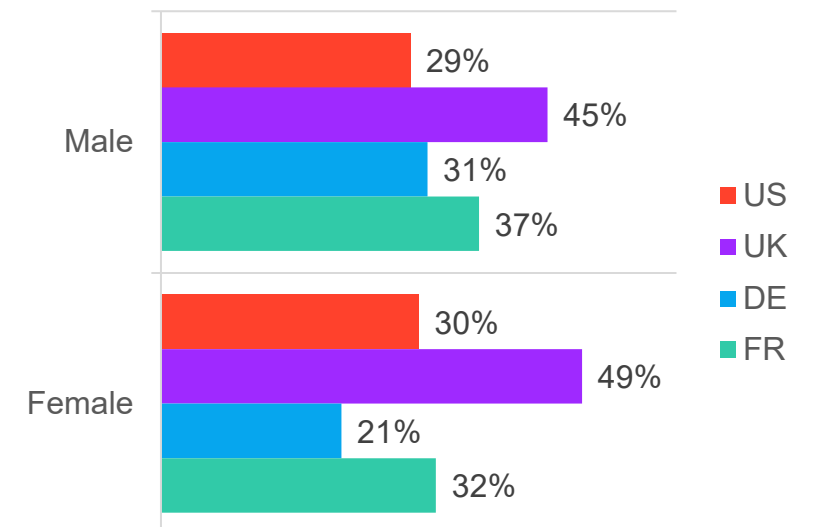
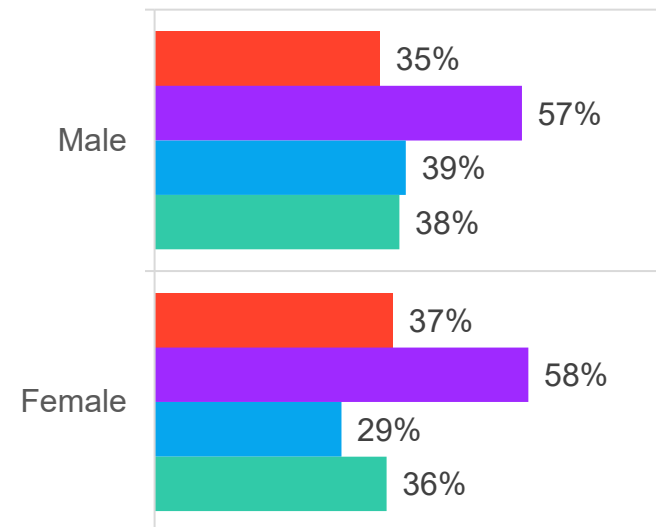
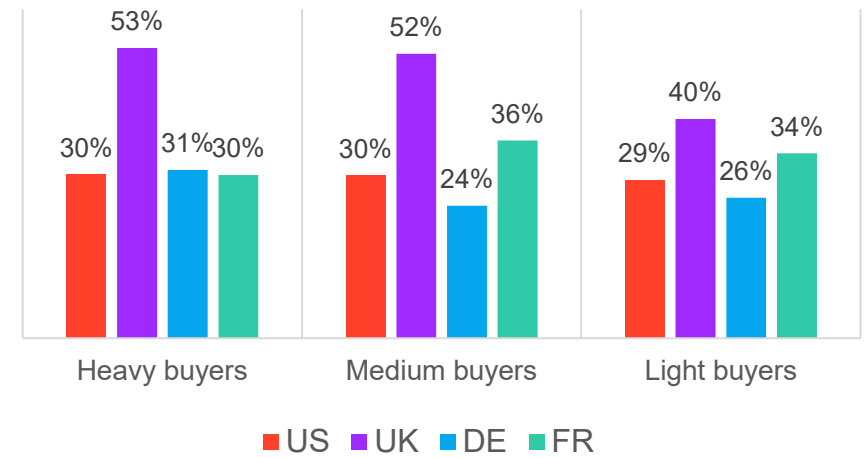
Sustainable production

Looking at these two issues by the country, we see that in the UK, skepticism is significantly higher and, with the exception of Germany, the difference between the sexes is limited.

Brits are most likely to say toy companies either don't prioritise producing sustainable products at all or only to a small extent



Brits are also most sceptical that major toy companies are doing well at becoming more sustainable

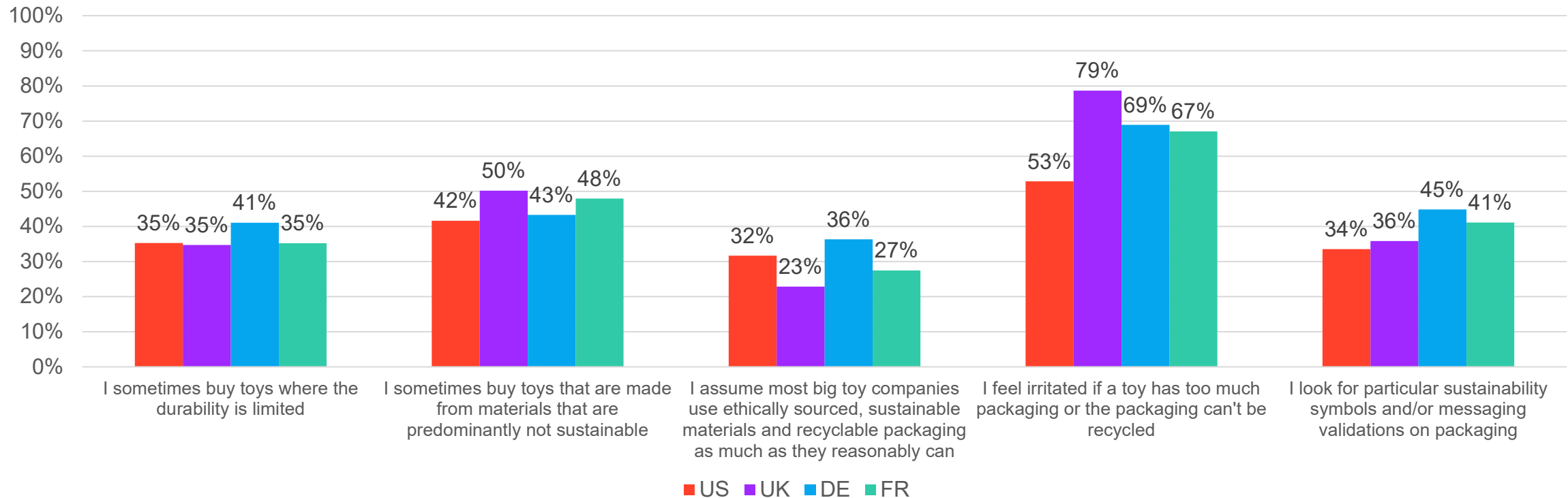


Question: To what extent do you think toy companies prioritise producing their products sustainably? How well or poorly do you feel major toy companies are doing at becoming more sustainable? Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.01.2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327. Not at all/To a small extent

Expectations from the green consumer



Sustainability is not driving purchases for most buyers. While around two in five say they look for sustainability validations on the packaging, and two-thirds are irritated by excessive packaging, many will compromise on either sustainability (almost half) or durability (around one-third).



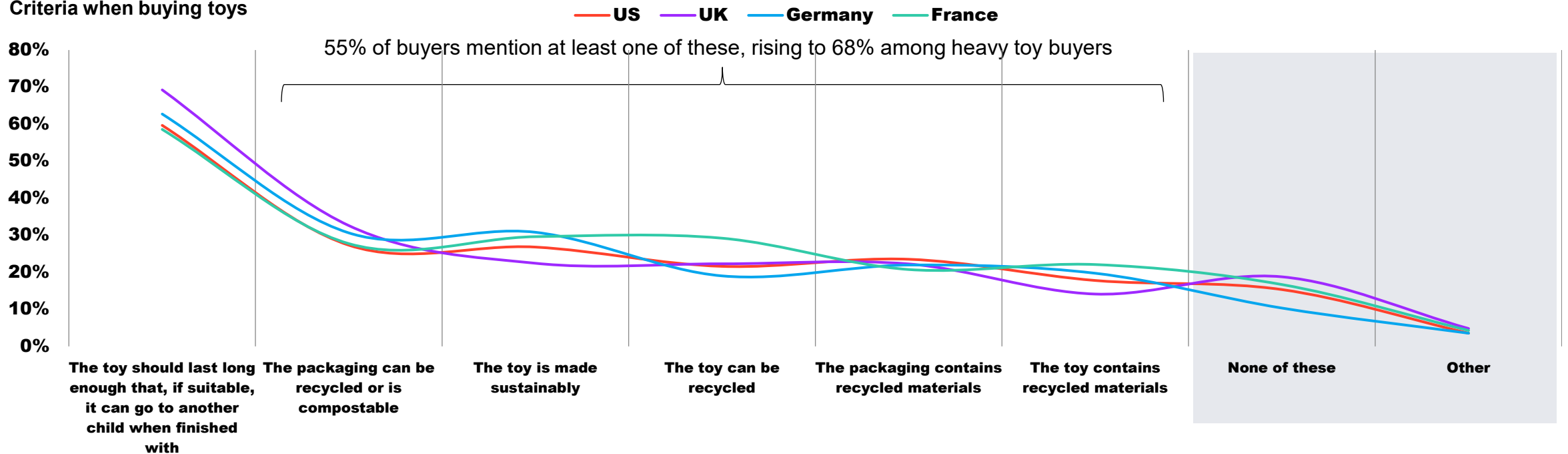
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Across markets, it is vital to consumers that toys are durable enough to be passed on to another child. And while no more than a quarter of purchasers care about any other sustainability or recyclability factors, we find 55% of buyers mention at least one of them, showing their importance.

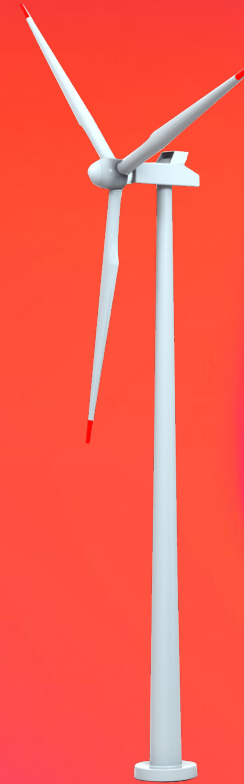
Criteria when buying toys



Question: Which of the following, if any, do you look for when buying a new toy? Please choose all that apply.
 Dataset: YouGov Omnibus. Field period: 25.10.2022 – 31.1. 2022. Base: US n = 1060, UK n = 1021 DE n = 860, FR n = 1327, FR n = 2203

Sustainable toy buyer

Who they are?





United States

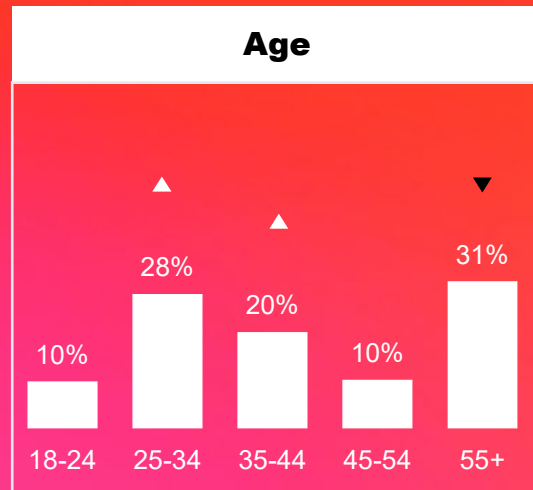
Sustainable toy buyers

Buy toys for children at least once a year and look for sustainable toy

Who they are?

Sustainable toy buyers don't stand out by most socio-demographics, but they skew towards 25-44-year-olds with children under 18.

These consumers are willing to pay more for premium quality but prioritize buying products produced ethically and sustainably.



Parents kids >18 y/o

Yes	44%	▲
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Look for buying toys

The toy is made sustainably	100%	▲
Durability, can be passed on to another child	63%	▲

Reasons for not buying toys

Concerns about adult themes or imagery	27%	=
Concerns about its morality	26%	=
Inappropriateness of the toy in modern society	26%	▲
Manufactured using unsustainable products	26%	▲

Member of

f	71%	
▶	46%	▲
📷	42%	▲
🐦	37%	▲

Psychographics

<p>"I'm more likely to engage with advertisement on social media than on regular websites." ▲</p>	<p>"I only buy products from companies that have ethics and values that I agree with." ▲</p>	<p>"I tend to choose premium products and services" ▲</p>
<p>"I often notice the advertisements on the sides of buses, newspapers, and magazines." ▲</p>	<p>"I like when companies have a moral message" ▲</p>	<p>"I'm more likely to engage with advertisements that are tailored to me" ▲</p>

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United Kingdom

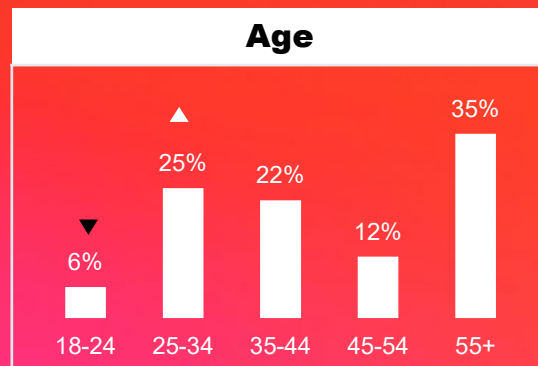
Sustainable toy buyers

Buy toys for children at least once a year and look for sustainable toy

Who they are?

Sustainable toy buyers skew towards younger females and parents. Apart from that, they don't stand out much compared to the broader national socio-demographics.

They assume most big toy companies use ethically sourced, sustainable materials and recyclable packaging as much as they reasonably can.



Gender

Female	61%	▲
Male	39%	▼

Income

Higher	21%	=
Middle	42%	=
Lower	21%	=

Parents kids >18 y/o

Yes	34%	▲
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Look for buying toys

The toy is made sustainably	100%	▲
Durability, can be passed on to another child	86%	▲

Reasons for not buying toys

The toy might be manufactured using excessively low paid labour or child labour	31%	▲
The toy is non-recyclable and unsustainable	27%	▲
The packaging is non-recyclable, unsustainable or excessive	26%	▲
The toy is immorally priced e.g. low entry cost but high on-going cost	25%	▲
The toy is too gender-stereotyped	20%	▲

Psychographics

"Toys should invite the child to be creative." ▲	"I like to look out for where my products are made or grown" ▲
"I assume most big toy companies use ethically sourced, sustainable materials and recyclable packaging as much as they reasonably can" ▲	

Member of

	72%
	50% ▲
	26% ▲
	22% ▲

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Germany

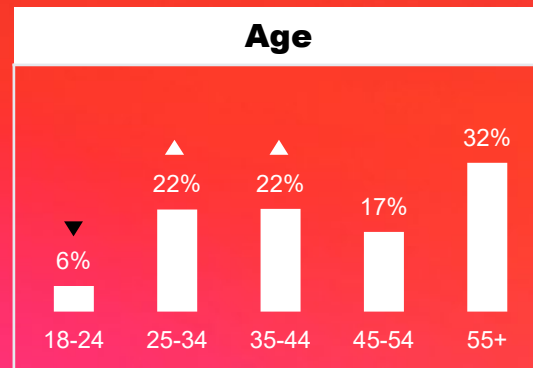
Sustainable toy buyers

Buy toys for children at least once a year and look for sustainable toy

Who they are?

Sustainable toy buyers don't stand much out compared with the general population but skew towards 25-44-year-olds with children under 18 and middle income.

These consumers have high expectations of the brands they buy and whom they expect to be socially and environmentally responsible.



Gender

Female	53%	=
Male	47%	=

Income

Higher	3%	=
Middle	46%	▲
Lower	38%	=

Parents kids >18 y/o

Yes	36%	▲
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Look for buying toys

The toy is made sustainably	100%	▲
Durability, can be passed on to another child	64%	=

Reasons for not buying toys

The toy is immorally priced e.g. low entry cost but high on-going cost	27%	=
Concerns about its morality e.g. might teach children the wrong message	26%	=
The toy might be manufactured using excessively low paid labour or child labour	24%	▲
The toy is manufactured in a country you don't wish to buy from	23%	▲
The packaging is non-recyclable, unsustainable or excessive	18%	=

Psychographics

"I often notice the advertisements on the Internet" ▲	"I try to buy only from companies that are socially and environmentally responsible" ▲
"If a brand I like expresses a view I agree with in advertisements, I'm more likely to buy it from that brand" ▲	

Member of

58% ▲

38% ▲

"I think green energy is the future."

84% ▲

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France

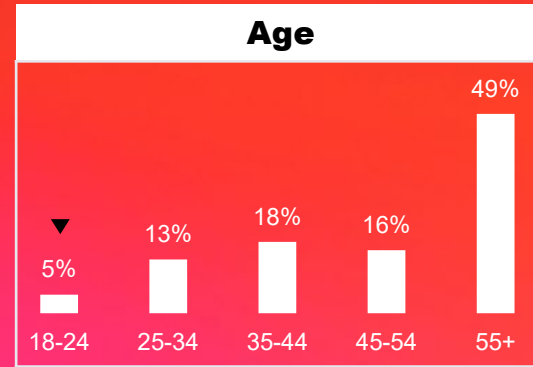
Sustainable toy buyers

Buy toys for children at least once a year and look for sustainable toy

Who they are?

Sustainable toy buyers don't stand out compared to the general population but they do skew 25-44 years old, but toy buyers do not necessarily have children living at home.

These consumers are very aware and try to buy only from companies that are socially and environmentally responsible.



Parents kids >18 y/o

Yes	32%	=
-----	-----	---

Gender

Female	54%	=
Male	46%	=

Look for buying toys

The toy is made sustainably	100%	▲
Durability, can be passed on to another child	69%	=

Reasons for not buying toys

Concerns about its morality e.g. might teach children the wrong message	39%	=
Concerns about adult themes or imagery	38%	=
The toy might be manufactured using excessively low paid labour or child labour	33%	▲
The toy is non-recyclable and unsustainable	28%	▲
The toy is manufactured in a country you don't wish to buy from	27%	=

Member of

f	70%
Instagram	32%
in	20%
Pin	17%

Psychographics

"I like to look out for where my products are made or grown" ▲	"I often notice the advertisements on the internet" ▲	"I tend to choose premium products and services" ▲
"If a brand holds a view I disagree with, I will stop buying from them" ▲	"Posters/billboards help me to become aware of new products and services" ▲	

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How to reach potential toy buyers
















Potential toy buyers

Women between 25-44 with children under 18 in household in the US, UK, France, and Germany

How to reach them?





These consumers are heavy users of social media and notice sponsorship in posts. They are most likely to see an advertisement online and visit parenting, fashion, and food websites.

				
	57%	83%	75%	77%
	53%	56%	62%	52%
	19%	18%	28%	31%
	15%	19%	18%	30%
	8%	39%	23%	29%





Type of sponsorship noticed				
				
Sponsoring a social media post	28%	23%	24%	22%
Product placement	35%	40%	36%	28%

Advertisement channel for grabbing attention

Online/Websites (e.g., apps, social networks, websites, on-demand, TV services, etc.)

			
38%	48%	55%	47%

Website/app types visited

				
Parenting and family	4%	19%	24%	17%
Fashion and beauty	7%	30%	29%	19%
Food and drink	6%	28%	37%	31%

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Thank you

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YouGov unlocks what your consumers were thinking yesterday, 5 years ago, and today.

20+
years consumer data

22m+
registered panel members

55+
markets

40m+
surveys carried out yearly

1m+
data points



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Robust research, for every budget and timeline.

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Identify & understand your target audience with ease.

Activate

Optimize campaigns with precision targeting & unmissable ads.

Track

Analyze brand health & campaigns against your competitors, daily.