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THE FUTURE OF PLAY.

Uncovering what drives parents' toy-purchasing decisions.

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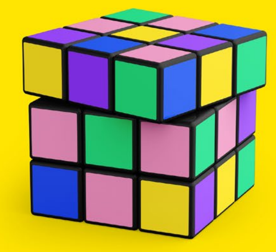

THE UK TOY MARKET IS EVOLVING FAST.

While economic pressures have made value for money a top priority for parents, the demand for toys that entertain, educate, and reflect modern family life is stronger than ever. As digital play and experience-led gifting rise in popularity, traditional toys continue to hold firm – particularly for younger children.

This report, based on a survey of 1,000 UK parents of children aged from newborn to 10 years old, uncovers the motivations driving toy purchases in 2025. It reveals how parents are blending convenience with conscious decision-making, and what they expect from the brands vying for their attention.

Physical toys remain the top choice for many – particularly in the early years – but as children grow, experiences begin to take centre stage. The challenge now is: how can toy brands stay relevant and resonate with parents of older age groups?

Meanwhile, in-store discovery, social content, and real-life activations remain key routes to influence, showing the power of integrated campaigns that span digital and real-world touchpoints. To foster deeper, lasting loyalty, brands must be present in the real world – and this research pushes back against the familiar narrative of a declining high street.

For many families, brick-and-mortar retail and in-person activations remain crucial aspects of the toy-buying journey – pointing to a requirement for immersive experiences and memorable moments that allow shoppers to engage with brands in new ways.

Overall, brands that want to cut through must lean into what modern parents care about: play that supports development, reflects their values, and shows real-world relevance. From representation and inclusivity to educational impact and product quality, this is a moment for toy companies to go beyond fun and pay real attention to participation, personalisation, and marketing experiences that are truly ‘felt’ by parents and children alike.

“Today’s parents are more intentional than ever with how and where they spend. This report highlights a clear shift in the way parents perceive value – it’s no longer just about price, but about purpose, quality, and shared experiences. With different generations of parents consuming content and making purchasing decisions in radically different ways, toy brands must rethink how they connect. Winning in this space means crafting emotionally resonant, multi-channel campaigns that span digital and physical touchpoints, and that reflect the values of modern families.”

Andy McCaul, managing director, The Bigger Boat

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REPORT METHODOLOGY.

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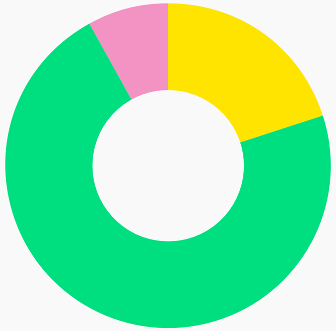
WE SAMPLED 1,000 PARENTS.

The research was conducted by Censuswide with a sample of 1,000 parents with children aged 0–10. The survey fieldwork took place between 11 April 2025 – 15 April 2025.

Censuswide abides by and employs members of the Market Research Society, which is based on the ESOMAR principles and is a member of The British Polling Council.

Age breakdown of respondents' children

- 7% under one year old
- 6% one
- 10% two
- 10% three
- 8% four
- 12% five
- 10% six
- 10% seven
- 10% eight
- 9% nine
- 9% ten



Generational split of respondents

- 20% generation Z (16–28)
- 72% millennial or generation Y (29–44)
- 8% generation X (45–60)
- 0% baby boomer generation (61–79)
- 0% the silent generation (80+)

Gender of respondents

- 52% female
- 48% male

Regional representation of respondents

- 7% East Midlands
- 8% East of England
- 19% Greater London
- 4% North East
- 12% North West
- 2% Northern Ireland
- 7% Scotland
- 11% South East
- 8% South West
- 3% Wales
- 10% West Midlands
- 9% Yorkshire and the Humber

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THE MODERN TOY TREAT.

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Nearly half of parents (49%) still prefer buying physical toys, with gen Z parents leading the way at 59%. This preference may reflect gen Z's emphasis on screen-free, active, and hands-on play – long-held values they're now passing on to their children.

However, a shift is underway: more than a third of parents (37%) now favour experiences they can share with their children, such as trips or event tickets, and over one in 10 (11%) are turning to digital toys, including apps and online games – a figure likely to grow as digital-first parenting becomes more common.

While gen Z parents show a strong preference for physical toys, millennials (37%) and gen X (42%) are leading the shift toward experiences, signalling a generational difference in how parents like to treat their children.

Regional variation reinforces this divide – parents in the south west are most likely to favour physical toys (57%), while in Wales, half (50%) prefer experiences.

An expected but important trend emerges with age. While 73% of parents of under-ones prefer physical toys, this drops sharply by age 10, when 50% favour experiences instead – such as trips or event tickets, for example.

While the experience economy continues to gain momentum, physical toys remain central to the early childhood experience, especially for children under five. However, as children grow, parents are seeking more than just tangible play. They want experiences that create lasting memories are becoming increasingly desirable, especially for older children.

The opportunity for brands lies in the middle ground – blending tactile, imaginative play with experience-led activities, creating products that offer not only entertainment but also opportunities for memory-making.

Toy companies that design products to encourage bonding, exploration, or shared moments can better meet parents' growing demand for meaningful play – especially as expectations shift with a child's age.

Beyond the product itself, there's also an opportunity to lean into experiential retail or toy-themed experiences that parents might choose to give, knowing they're creating lasting memories while still delivering the joy of play.

49% of parents still prefer buying physical toys

37% of parents favour experiences they can enjoy

11% of parents are turning to digital toys

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WHAT REALLY DRIVES TOY PURCHASES?

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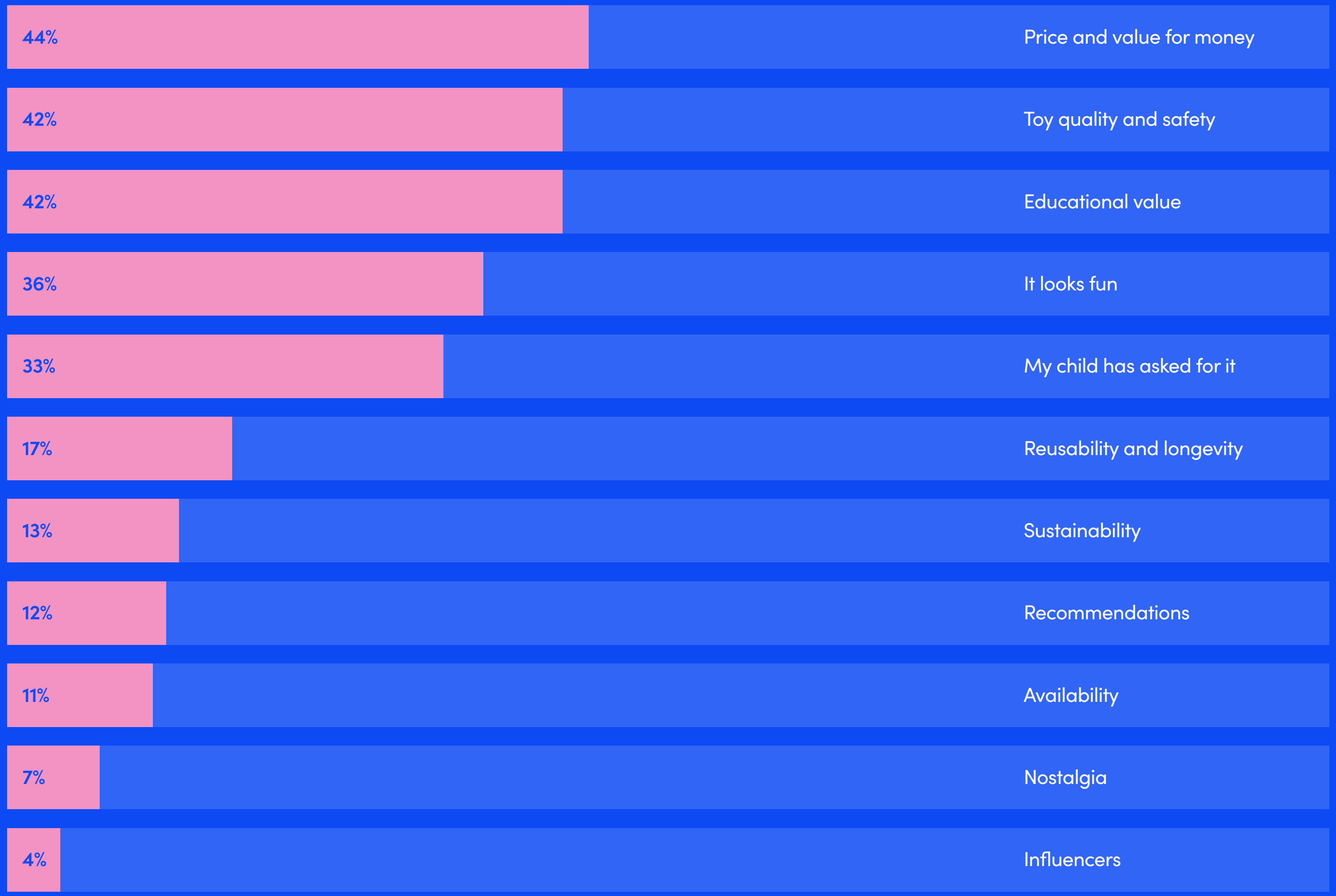
Price remains the top driver for parents, with 44% citing value for money as the most influential factor when choosing toys. However, it's closely followed by toy quality and safety, and educational value – each selected by 42% of parents – suggesting that cost alone doesn't seal the deal.

Although sustainability and brand ethics continue to gain traction in other markets, just 13% of parents said these were deciding factors when buying toys. Nostalgia ranks even lower, influencing only 7%.

Generational differences also shape buying habits. Gen Z parents are most focused on toy quality and safety (49%), while millennials (46%) and gen X (54%) are more cost conscious, prioritising affordability.

For toy brands, the challenge is clear: value still leads, but 'value' must go beyond price to include quality, learning potential, and longevity. Brands that can strike this balance are more likely to win parental trust – and repeat purchases.



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LEARNING THROUGH PLAY.

Which skills matter most to parents?

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Parents place high value on toys that support their children's development, with creativity and imagination (61%) topping the list of desired skills.

Close behind are cognitive and problem-solving abilities (60%), highlighting parents' focus on fostering critical thinking and learning through play. Social and emotional development also ranks highly, with 49% of parents emphasising the importance of supporting children's social skills and nurturing emotional regulation.

This focus on emotional and social skills remains great news for doll play, doll manufacturers, and character brands. Roleplaying with dolls offers a unique opportunity for children to develop a broad range of essential skills, such as empathy, kindness, sharing, patience, problem solving, and emotional understanding.

In these roleplay scenarios, children often emulate their parents' life and environment, nurturing and caring for their dolls in a way that mirrors the interactions they observe at home. This type of play allows children to explore complex social dynamics and emotions, reinforcing the importance of these qualities in real-life relationships.

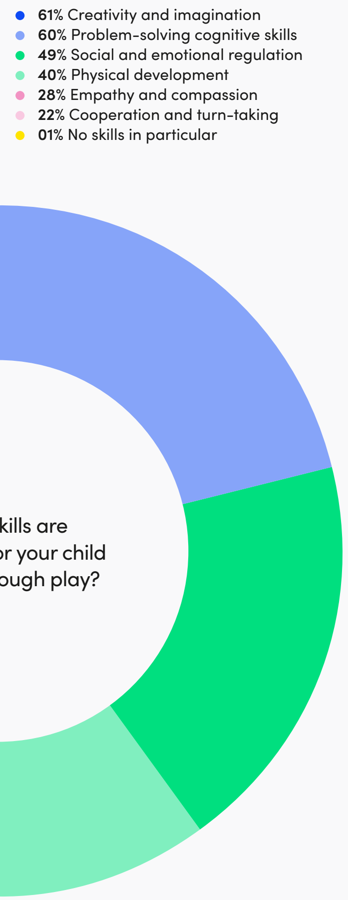
Interestingly, cooperation and turn-taking, which might traditionally be seen as key developmental milestones, are less prioritised by parents, with only 22% considering them essential outcomes of play. This suggests that, while important, these skills may be overshadowed by a greater focus on independent thinking and emotional intelligence.

A noteworthy generational shift is seen in gen Z parents, nearly half of whom (49%) prioritise physical development through play.

This may reflect the broader lifestyle habits of gen Z, who are often more health-conscious and focused on fitness and mental wellbeing than previous generations. Their desire to stay active and mindful is now translating into how they parent, favouring toys that encourage movement, physical confidence, and active play from an early age.

As parents continue to seek toys that deliver both entertainment and developmental benefits, there is a clear opportunity for brands to create products that combine imaginative play, cognitive stimulation, and physical activity.

This growing demand for toys that engage both the body and mind indicates strong market potential for products that blend fun with educational purpose, especially among gen Z parents.



CAPTURING ATTENTION.

The power of in-store experiences, social channels, and real-life participation.

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In the ever-evolving toy market, in-store displays (46%) and social media advertising (44%) are the most effective channels for capturing parents' attention when making purchasing decisions.

YouTube content also proves influential, with 35% of parents citing it as a key platform for toy discovery, reinforcing the growing power of video content in shaping consumer choices.

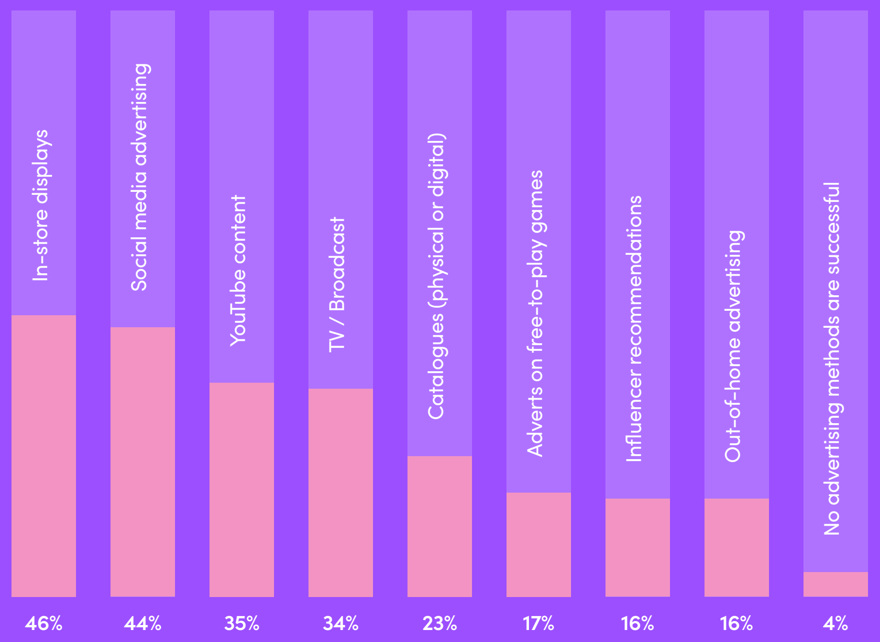
However, not all channels are equal. Influencer recommendations and out-of-home advertising (billboards or transit ads, for example) appear to have less impact, with only 16% of parents reporting these methods as influential. This suggests that while influencer marketing may have its place, it isn't as effective for driving toy purchases as other more direct forms of engagement.

Generational differences further illuminate parents' media preferences. TV advertising, for example, retains strong appeal with gen X parents (44%), highlighting the lasting relevance of traditional media for this demographic.

In contrast, younger generations, particularly gen Z (43%) and millennials (48%), are more drawn to in-store displays, which remain a top choice for both groups, followed closely by social media content.

The findings challenge the recent narrative that the high street is in decline. Far from it – in-store displays remain one of the most effective ways to grab parents' attention. For many, particularly younger parents, a hybrid approach combining physical browsing and in-person interactions with online discovery is key. Toy brands looking to win in this space must tap into the fast-growing trend of experiential, sensory-led activations and events done so well by others in the retail space. These immersive moments give shoppers a chance to connect and interact with brands on a deeper level and build longer-term brand loyalty as a result.

Toy brands have a prime opportunity to bridge these two worlds (online and offline) by integrating physical and digital marketing strategies – using in-store displays and events to spark interest and excitement, while reinforcing those messages through social media, short-form videos, and online reviews. This multi-channel approach can help toy companies remain front-of-mind and drive purchases across generations.



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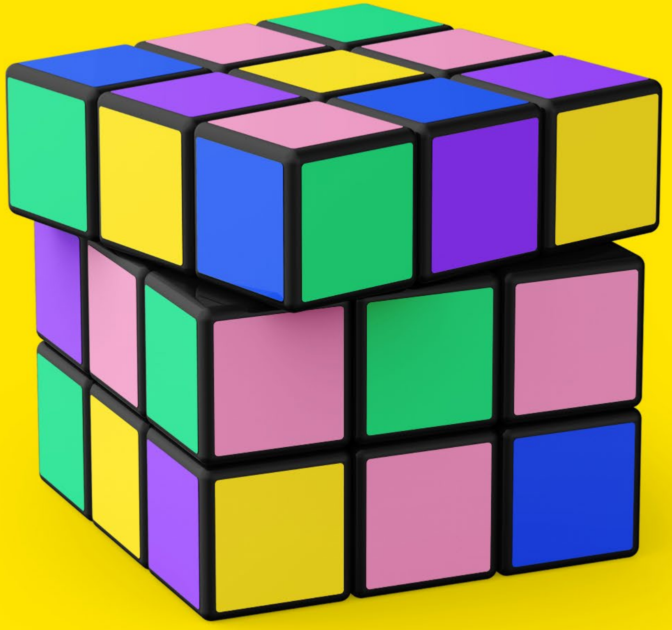
FROM AWARENESS TO PURCHASE.

Clicks or tills? Understanding parents' path to purchase.



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ONLINE PURCHASES DOMINATE.

Parents today are highly research-focused when it comes to toy purchases. The majority (24%) start by checking online reviews, while 20% compare prices across multiple websites. This indicates a more considered and price-conscious buying process, with parents prioritising value and informed choices.

When it comes to making the purchase, online marketplaces dominate, with 32% of parents turning to platforms like Amazon or Very. However, physical retail remains an important touchpoint, especially for younger parents, as 31% of gen Z respondents prefer to buy in-store at traditional toy shops.

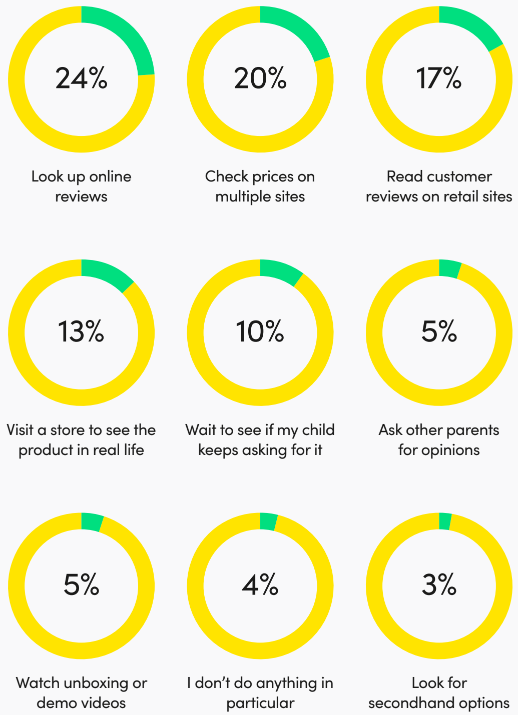
A significant shift is also evident in the rise of second-hand shopping, particularly among parents of newborns and children up to four years old.

With 38% engaging with resale platforms like Vinted or charity shops, this trend reflects a growing demand for sustainable and budget-conscious options for early years toys.

Today's parents are savvy and selective shoppers, combining the convenience and speed of online retail with the tactile confidence offered by in-store experiences.

Despite the dominance of digital shopping, physical stores remain a trusted space for parents to engage with products before committing to a purchase.

And while the secondhand toy market may not yet lead the way in volume, its rapid growth among parents of younger children shows it's a space brands can't afford to overlook.



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WHICH BRANDS ARE ENGAGING PARENTS BEST?

Parent approved: the brand leaders getting it right.

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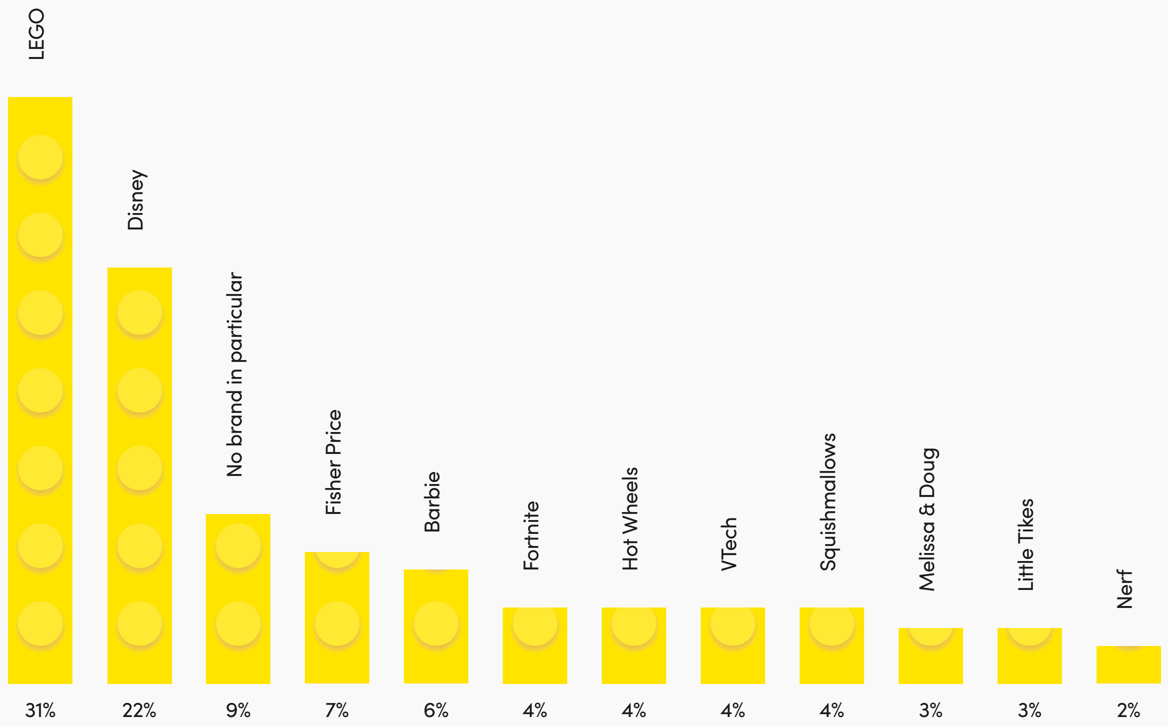
LEGO LEADS.

LEGO leads the pack, with 31% of parents naming it as the brand doing the best job of engaging them. Its popularity is especially strong among gen X (46%) and in Greater London, where nearly 40% show a clear preference. Disney follows at 22%, topping the list in Yorkshire and the Humber.

Other brands that earned recognition include Minecraft, Roblox, Jellycat, and Moose Toys – each carving out a space by tapping into specific interests, from digital worlds to sensory-led play and collectability.

LEGO's continued success in engaging parents isn't accidental. The much-loved firm blends constructive and imaginative play – skills that parents consistently rank among the most important for child development.

Its cross-generational appeal also builds long-term brand loyalty, rooted in nostalgia for older parents and educational value for new ones. These findings reinforce how trust, familiarity, and alignment with parental values – whether creativity, quality, or emotional connection – can elevate a toy brand above the rest.



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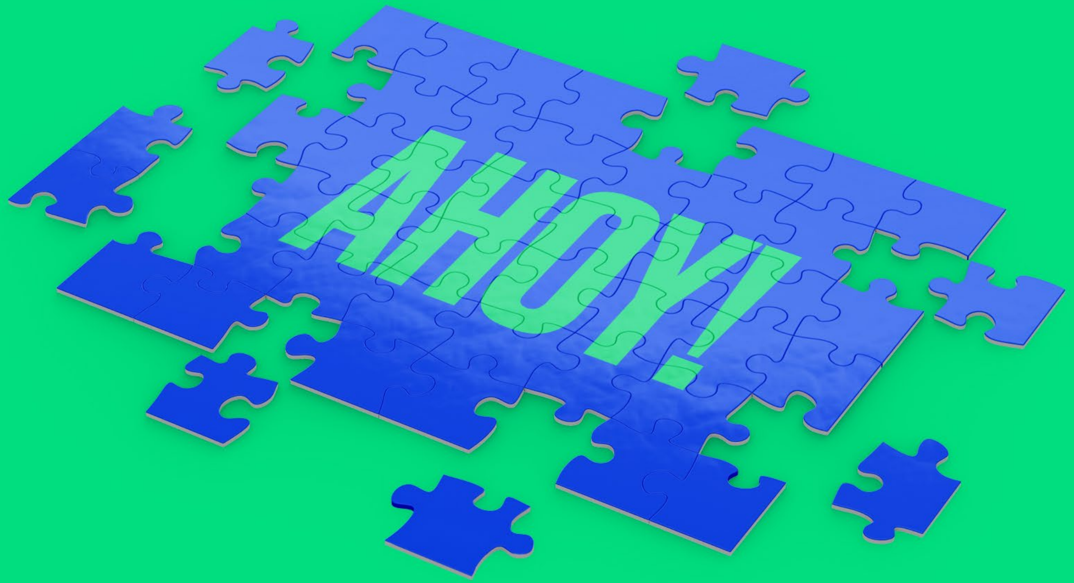
INCLUSION IN THE TOY MARKET.

Where are the gaps?



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Nearly two thirds of parents (63%) believe the toy industry still has work to do when it comes to inclusivity.

Among those who identified gaps, the most frequently mentioned areas were physical disabilities (19%), neurodivergent identities such as autism and ADHD (18%), and body diversity (16%).

Open-ended responses added further depth, with parents highlighting a wide range of underrepresented groups and themes, including:

- Disabilities, such as visual impairments or limb differences
- Neurodivergence, including autism and ADHD
- Ethnic and cultural diversity, particularly among Asian and African communities
- Non-traditional family structures, such as same-sex parents
- Intergenerational representation, including elderly characters
- Varied body shapes and sizes

While progress has been made, many parents still feel the toy aisle doesn't reflect the real-world diversity their children experience. There's a growing demand for toys that are more representative – not just in appearance, but in the stories and experiences they reflect.

For toy brands, this presents a clear opportunity. By expanding representation across physical, cognitive, cultural, and family dimensions, companies can not only strengthen emotional connections with parents but also ensure children grow up with toys that validate and celebrate who they are – and who others are too.

"Different occupations ie teachers and doctors etc"

"Barbie figures etc always have slim dolls"

"Birth marks, acne"

"Christianity"

"A Muslim Barbie!!"

"I don't often see religious identities in toys"

"There are few toys representing children with larger body types"

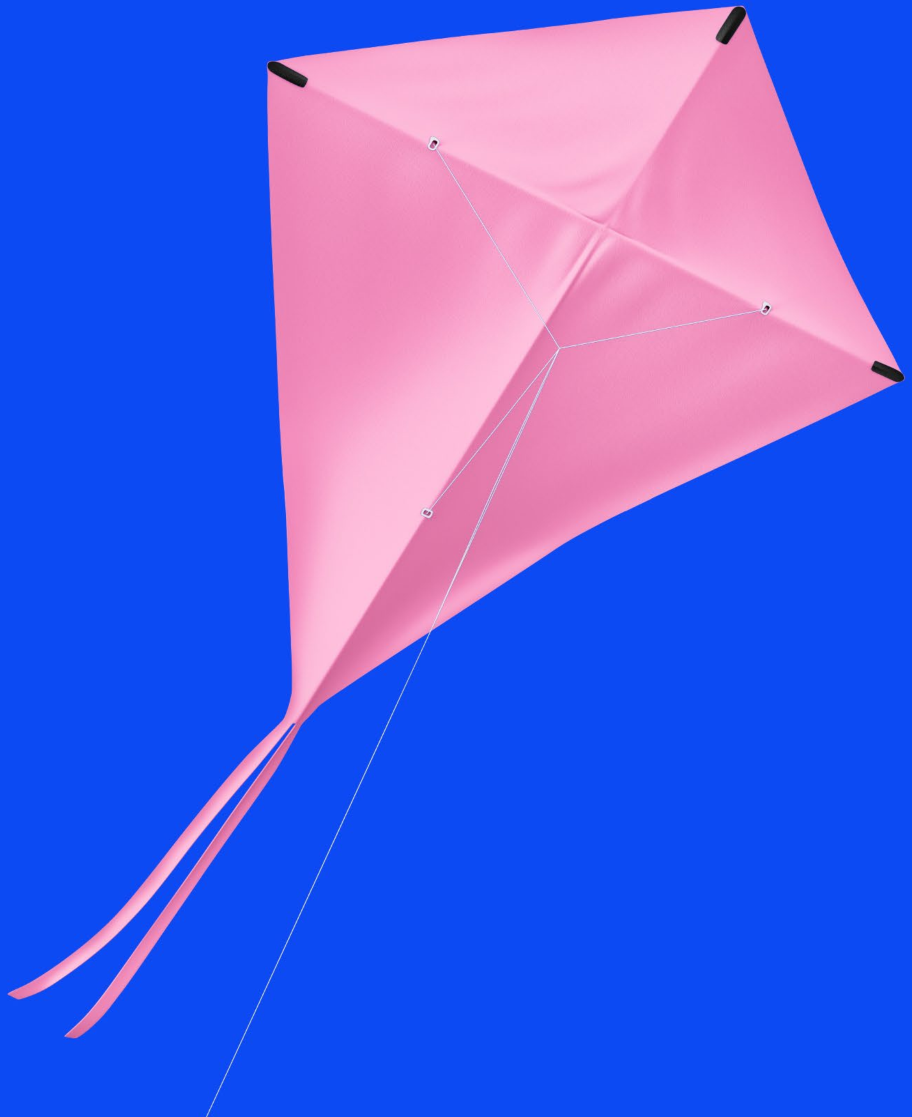
"Toys that reflect Christian themes are often limited to niche markets"

"Lack of toys that accommodate sensory needs"

"Toys in wheelchair or with prosthetics"

"There's a significant gap in toys that reflect or support neurodivergent kids"

TURNING INSIGHTS INTO ACTION.



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This report has uncovered what today's parents truly value in toys – from developmental benefits and representation to shopping behaviour and brand engagement. The findings reveal clear pain points, but also huge opportunities for brands that are ready to respond. As a marketing agency immersed in consumer behaviour and brand strategy, we've translated these insights into practical recommendations. Here's how toy brands can meet evolving parent expectations and stay ahead in a changing market:

01

Parents are seeking more meaningful purchases, especially as children get older. Shift messaging from product features to benefits that resonate – emphasise how toys build memories, support development, or encourage togetherness. Position your brand in the 'experience economy', not just the toy aisle.

02

Physical toys remain essential, but parents are also looking for experience-based gifts that create shared memories. Develop or promote toys with built-in experiences, companion content, or story-based extensions. Explore experiential retail pop-ups or giftable events (for example, 'a day out with a character') that merge physical products with memory making.

03

Parents are torn between affordability and quality. Help parents justify their spending. Use messaging to highlight durability, educational value, and versatility in play – not just price. Consider offering bundles, longevity guarantees, or 'value over time' communications.

04

Parents value emotional, social, and cognitive development – but few toys overtly claim to support these skills. Reframe your products around skill-building. Align messaging with the developmental outcomes parents want – creativity, confidence, problem solving, or emotional understanding – especially for under-fives.

05

Gen Z parents place greater importance on physical development than previous generations. Position active play as essential. Highlight movement, physical confidence, and wellbeing benefits in your marketing. Tie into fitness and wellness culture to stay relevant with younger buyers.

06

Despite the digital age, in-store displays and real-life activations and experiences remain a hugely influential driver of discovery. Don't neglect the shelf. But the same goes for in-person activations and events, which can serve experiences that are truly felt and lived, sparking connection and participation, and building longer-term loyalty as a result.

07

Marketing channels must flex across generations. Develop multi-touchpoint campaigns that reflect age-specific behaviours. For gen X, keep TV and traditional media in play. For gen Z and millennials, lean into social, search, and influencer-led storytelling – especially YouTube and TikTok.

08

Parents are savvy researchers – price checking, reading reviews, and comparing options before buying. Build trust at every touchpoint. Use your brand channels, retail partners, and SEO strategy to make reviews, testimonials, and 'why this toy?' content easy to find and credible.

09

Secondhand shopping is rising – especially for early years. Don't fight resale – embrace it. Create your own certified pre-loved scheme or content series promoting repair, reuse, and sustainability. Show parents you're part of the circular economy.

10

Parents feel the market lacks inclusive toys, particularly around disability, neurodivergence, and body diversity. Make inclusivity visible and meaningful. Co-create with communities, go beyond surface-level representation, and communicate clearly about the real stories and thinking behind your designs.

If you're ready to take your brand to the next level, we're here to help you turn these insights into actionable strategies. Let's work together to create impactful marketing solutions that resonate with today's parents. **Get in touch.**

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ABOUT THE BIGGER BOAT.

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Founded in 2010, The Bigger Boat is an integrated marketing agency, focused on building powerful brands that accelerate growth and enhance value for pioneering companies and their investors. Whether working with investors or visionary business owners, the agency provides strategic solutions that maximise impact.

With a clear and cohesive roadmap, along with an integrated, solutions-agnostic approach (spanning creative, branding, website development, content and digital marketing, PR, and social media marketing), the firm helps its clients accelerate timelines, maximise ROI, and enhance business value for long-term success. The Bigger Boat is well versed in the toy sector, having worked with brands including Zapf Creation, Little Tikes, and Casdon.

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