



Where Consumers Shop for Toys and Games

September 2024

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Scope

Key findings

INDUSTRY SNAPSHOT

Recovery in toys and games fuelled by the power of pop culture

Digitalisation continues to fuel the popularity of video games

Toy companies are shifting their focus to emerging markets

CHANNEL SHIFTS

E-commerce continue to outpace physical stores growth

Store-based channel remains crucial in emerging markets

Omnichannel strategies will help grow the market

STORE-BASED CHANNELS

One-stop shopping solution remains the biggest offline sales driver

Specialist retailers set for a rebound

Manufacturers and retailers are racing to build more stores

The return of Toys “R” Us is expected to change the market landscape

Hamleys turns its focus towards experiential retail and digital strategy

Lego continues its aggressive store expansion

Hypermarket remains the go-to channel in North America and Australia

Western Europe and Asia Pacific account for the bulk of private label sales

NON-STORE CHANNELS

E-commerce continues to gain share in toys and games

E-commerce growth for traditional toys and products slows after the spike in 2020

Companies focusing more strongly on their digitalisation strategies

Latin America to continue generating strong e-commerce growth

Amazon continues to expand its toys and games SKUs

FUTURE DEVELOPMENTS

“Kidults” remain a crucial growth driver

Mobile games will be the largest growth driver in toys and games

E-commerce to continue outpacing retail offline at a slower rate

Key takeaways

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