



Euromonitor
International

Where Consumers Shop for Toys and Games

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INTRODUCTION

Key findings

Toy buyers still want to see the toys before buying

STATE OF THE INDUSTRY

Traditional toys bucking the e-commerce trend as purchases are mostly offline

Escapism and nostalgia to fuel toys and games growth

Video games surged globally except Turkey, where government measures cut growth

Asia embraces mobile games, while traditional toy companies seek refuge in the West

Digital distribution of video games propelled e-commerce sales

OFFLINE RETAIL

Hypermarkets are critical to toys and games sales in selected regions

Discounters and appliances and electronics specialists beating the odds

Connection, discovery and nostalgia keep traditional toy stores relevant

Hypermarkets offer the ultimate convenience for time-pressed consumers

Different product type shapes retail channel success

PopMart's success formula is its aggressive retail expansion

Cyberpunk 2077's success reinforced the value of physical distribution

RETAIL E-COMMERCE

Video games lead e-commerce growth whereas traditional toys sales rely on stores

China drives Asia Pacific's e-commerce dominance in toys and games

The ascension of TikTok (ByteDance) as a retail platform

Explosive growth of e-commerce driven by video games software

Consoles ignite online sales, but physical retail holds strong for kids and families

Digitalisation and e-commerce drive Sony's Game & Network Services' success

Monopoly Go! revitalises Hasbro's revenues as consumers shift to digital downloads

CONCLUSION

E-commerce continues to erode into offline sales

Recommendations/how to win

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