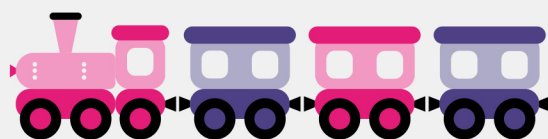
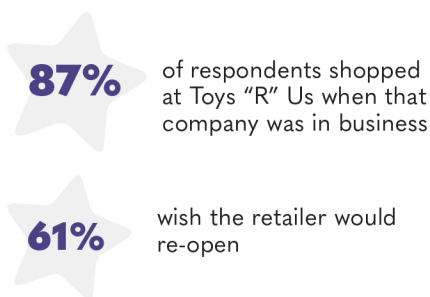


What's Happening in the Toy Marketplace



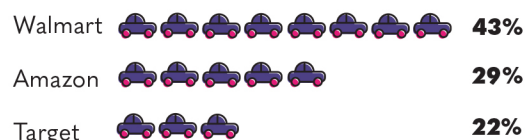
The liquidation of Toys "R" Us left an \$11B hole in the toy industry. Which retailers have those shoppers chosen instead? We surveyed our Glimmer community to understand how they are now shopping for toys. In doing so, Stella Rising unlocked key insights into the ways in which retailers can now attract the toy shoppers who lost their favorite destination. With general trends in U.S. toy sales forecasted to reach +\$65MM by 2022, this significant market requires attention.

THEY LOVED TOYS "R" US!

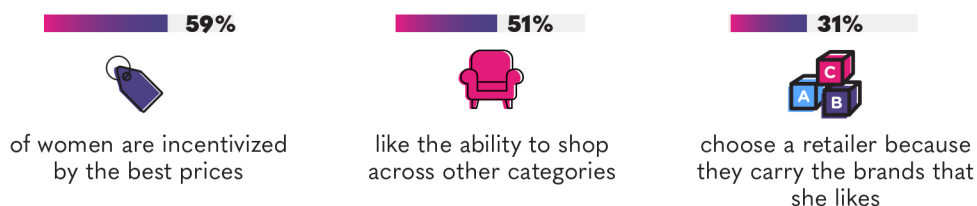


WHAT IS REPLACING TOYS "R" US?

The majority of women are now shopping at Walmart, Amazon, and Target



WHAT MOTIVATES HER CHOICE OF RETAILER?



WHY SHE SHOPS

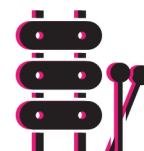
These top two behaviors indicate how to unlock her cart

- She's budget conscious**
87% of women follow brands on social media to enjoy deals and coupons
- She prefers a range of toys**
Retailers should stock many different types of toys

THE TOP TOYS ON THE SHELF

A diverse selection of categories comprise her favorites

- Learning & Education (70%)**
- Dolls & Action Figures (65%)
- Arts & Crafts (65%)
- Books & Puzzles (65%)
- Board Games (58%)



PLAYING ON AMAZON

What does she enjoy about the Amazon toy shopping experience?



- **Free Shipping (51%)**
- Larger selection of product (46%)
- Ability to shop other categories (34%)