UPDATED

ALL THINGS TOYS

Moms and Kids Talk Toy Shopping & Buying

LETTER FROM THE CEO

It's Q4. Toy Fever is Spreading.

"Lovely, glorious, beautiful Christmas, around which the entire kid year revolved."
- Ralph "Ralphie" Parker ("A Christmas Story")

With the holidays rapidly approaching, I'm reminded of this quote from a beloved holiday classic. As a parent, and, admittedly, a big kid-at-heart, I know the months leading up to the holidays are full of toy fever—as kids make their lists, parents make their purchases, and companies, hopefully, make their forecasts.

Because toys drive so much of the overall holiday spending bonanza, we at Field Agent ran a series of studies to uncover moms' and kids' attitudes and behaviors toward toy shopping. Over the next pages we offer a variety of insights, including the top retailers for toy purchases, the favorite toy franchises among boys and girls, and the role of digital services in toy shopping.

Toys may be fun, but, in Q4, toys are serious business. And as toy fever sets in, I believe this report will prove a valuable resource to brands, retailers, and agencies.

Rick West
CEO & co-founder, Field Agent

What's Inside?

TABLE OF CONTENTS

4 Toy Priorities & Frustrations Among Moms

6 Preferred Retail Destinations for Toy Purchases

8 Toy Shopping in an Omnichannel World

9 Power Up: Moms Share Battery Preferences

10 What Do Boys and Girls Really Want in Their Kid's Meals?

11 Toys in Perspective: How Do Toys Stack Up Against Other Gift Categories

12 What Boys Want for Christmas

13 What Girls Want for Christmas

15 Making a Wish List: How Children Learn About Toys

16 Bonus Stage: Kids & Moms Talk Video Games

21 Methods & Demographics

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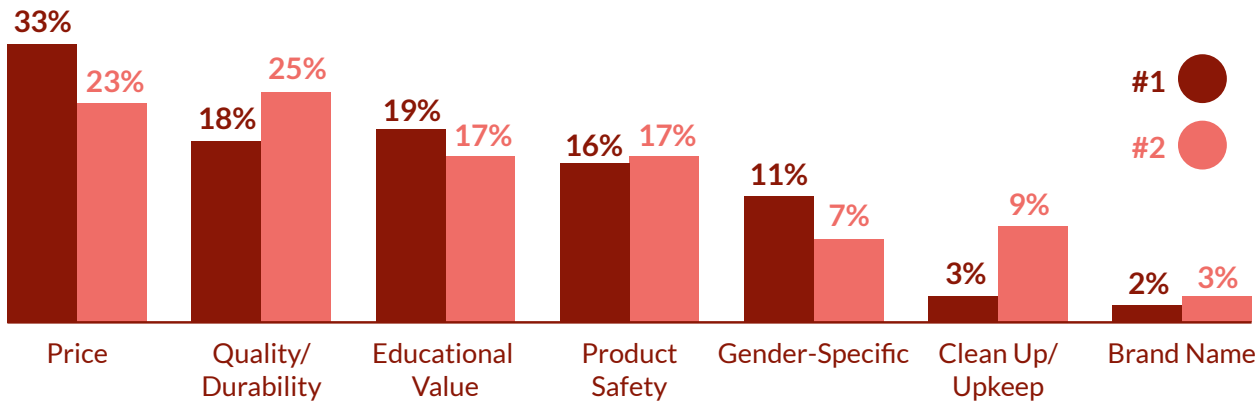
TOY PRIORITIES & FRUSTRATIONS AMONG PARENTS

Moms don't toy around on toy purchases.
But what really matters to them as they shop for and buy toys for the kiddos?

In Field Agent's survey of 1,531 moms, all personally involved in making toy purchases for their 5-12 year olds, four priorities most distinguished themselves: (a) price, (b) quality, (c) educational value, and (d) product safety, amassing 56%, 43%, 36%, and 33% of #1 and #2 rankings, respectively.

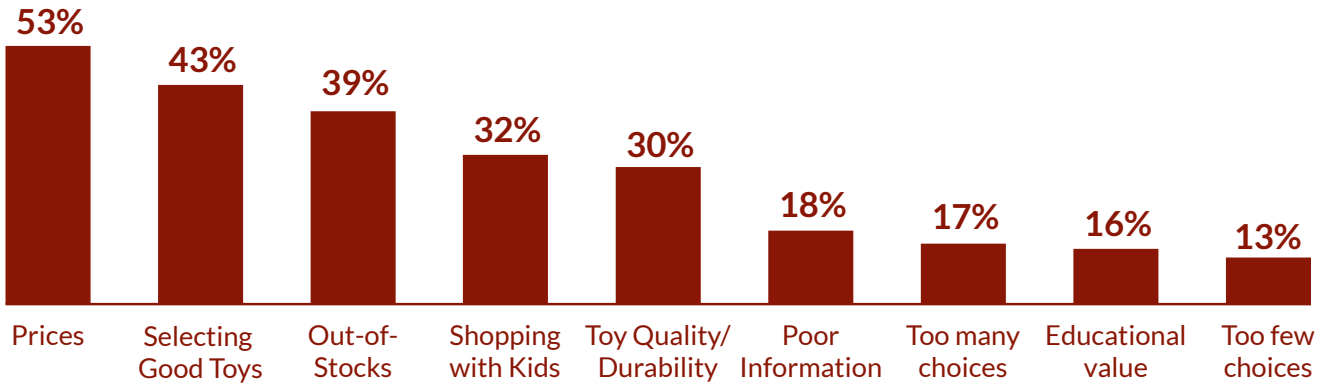
Rank what matters when buying toys for your child, where 1 is most important and 7 is least important.



N = 1,531 moms of 5-12 year olds

Naturally, where there are parental priorities, there are bound to be parental frustrations. In the Field Agent survey, more than half of moms (N=1,531) said, when it comes to toy-shopping, they're especially frustrated with prices (53%) and selecting toys their children will actually play with/like (43%). Out-of-stocks (39%) are also a common source of irritation.

Which of the following particularly frustrates you about shopping for toys?



N = 1,531 moms of 5-12 year olds

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With billions of dollars up for grabs in Q4, companies can't afford to bring anything less than their A-game.

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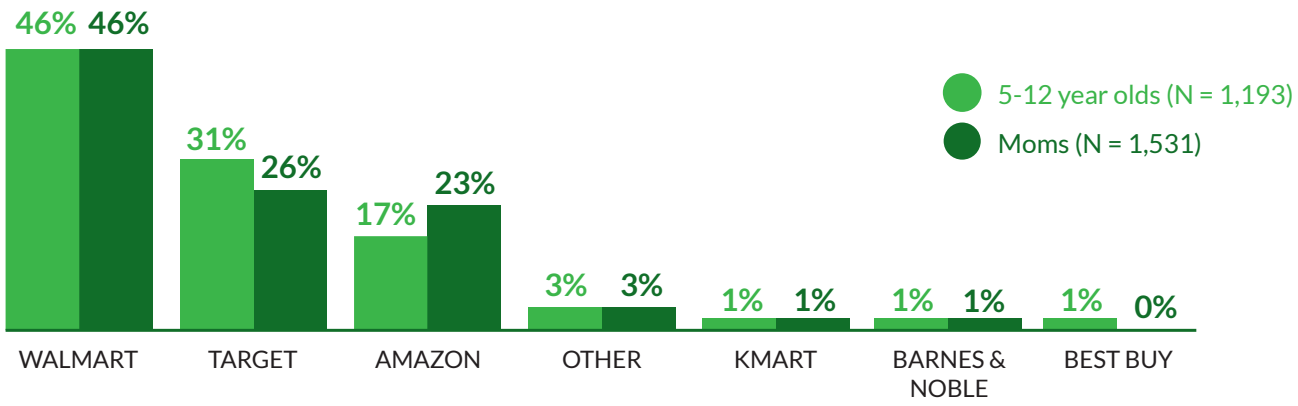
PREFERRED RETAIL DESTINATIONS FOR TOY PURCHASES

Which retailers have captured the affection of toy shoppers?
And do moms and kids differ on the best places to shop for and buy toys?

When we first published this report two years ago, Toys-R-Us was easily kid's favorite toy-retailer.

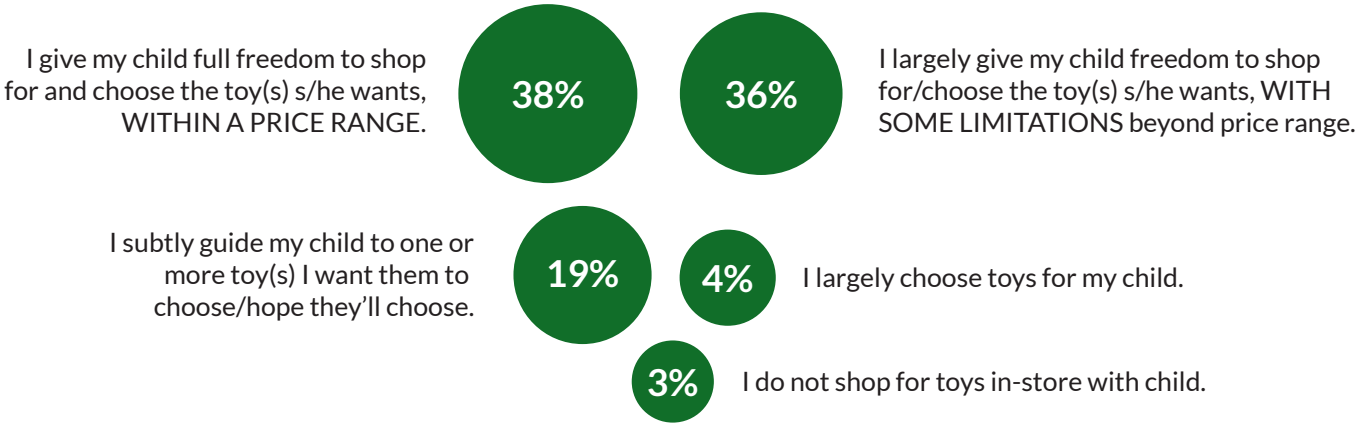
Now, with Toys-R-Us out of the picture, moms and kids are far more likely to agree on a favorite toy destination. As it turns out, close to half of moms and kids chose Walmart.

From which ONE retailer if your favorite for shopping for and buying toys?



How do moms shop for toys in stores when the kids tag-along? Who leads—parent or child? As you can see, kids get alot of freedom in choosing toys.

When deliberately shopping for toys IN-STORE WITH YOUR CHILD, which BEST describes your approach?



N = 1,531 moms of 5-12 year olds

Blog Special:

WHERE WILL TOYS "R" US SHOPPERS BUY THEIR TOYS FOR CHRISTMAS 2018?

Read the Blog Post

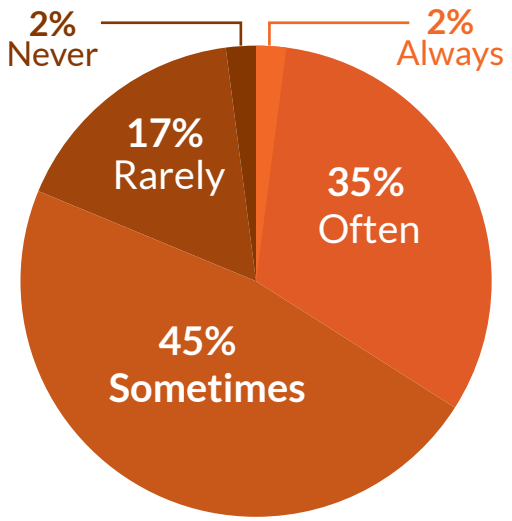
TOY SHOPPING IN AN OMNICHANNEL WORLD

Omnichannel is all the rage today, but has the rage come to toys yet?

According to survey results, among moms with kids 5-12, 37% say they always or often, and 45% sometimes, purchase toys online. Only 2% responded never.

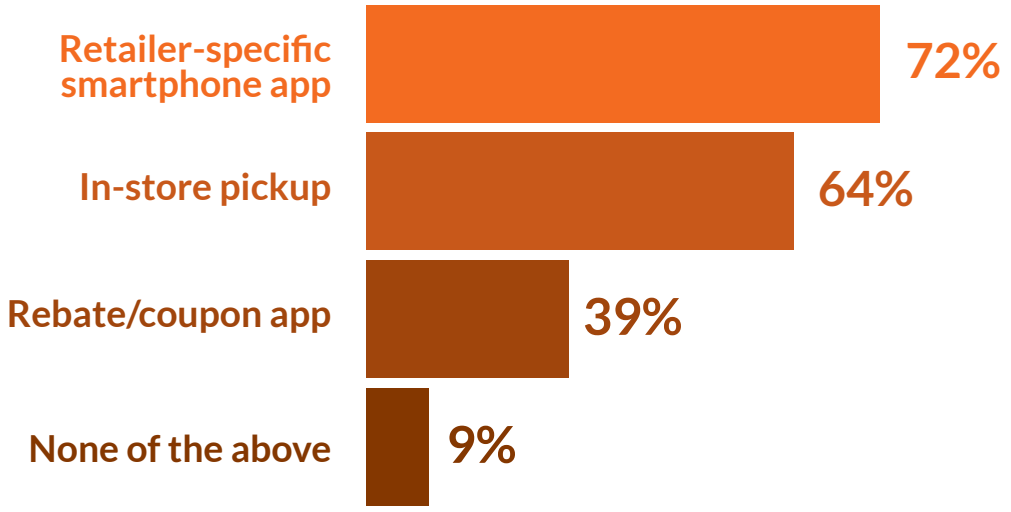
Omnichannel services, too, are becoming quite prevalent for toy purchases. A resounding 72% said they've used a retailer-specific smartphone app in the last five years to make toy purchases, and 64% report using store pickup.

How often do you purchase toys for your child online?



N = 1,531 moms of 5-12 year olds

Which of the following have you used in the last five years when making toy purchases?



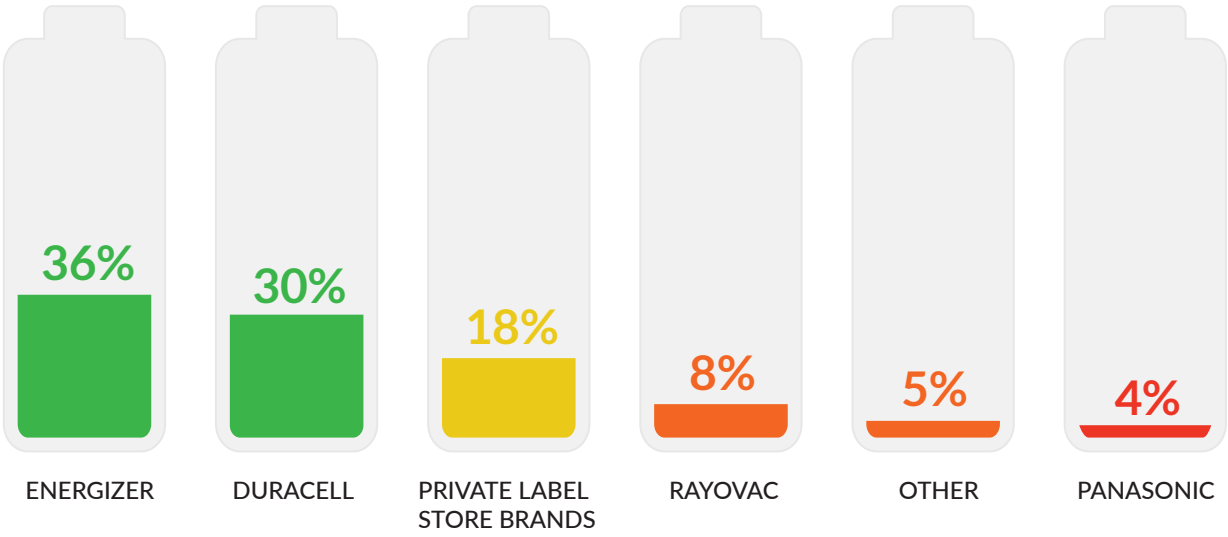
N = 1,531 moms of 5-12 year olds

POWER UP: MOMS SHARE BATTERY PREFERENCES

Something has to make all those remote control cars, back-flipping puppy dogs, and handheld video games do their thing.

Field Agent queried 1,536 moms to determine which battery brands they most commonly purchase for powering their kids' toys. Battery juggernauts Energizer (36%) and Duracell (30%) were atop the ranking, with Rayovac (8%) a distant fourth behind private label, store brands (18%).

When you purchase batteries for your child's toys, which one brand do you buy most often?



N = 1,536 moms of 5-12 year olds

Batteries Included?

Moms were also asked to describe the ideal "batteries included" scenario when buying new toys.

Which of the following best describes your preference for battery-powered toys?

N = 1,536 moms of 5-12 year olds

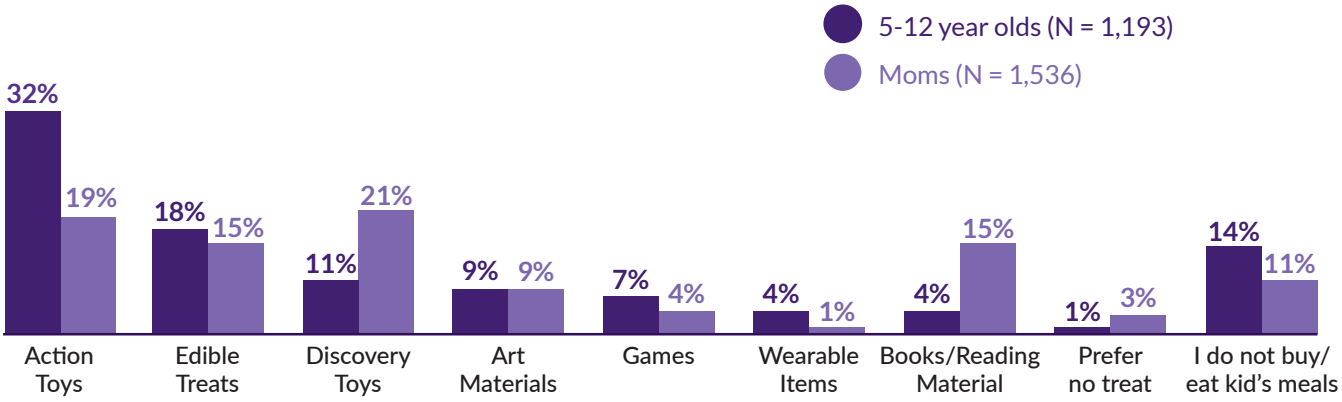
WHAT DO BOYS AND GIRLS REALLY WANT IN THEIR KID'S MEALS?

Many fast food establishments have a longstanding practice of including a toy or other "happy" in their kid's meals. What treats would be included in these meals if children and parents had their way?

As you can see, moms have a slight preference for discovery toys followed by action toys, while kids have a strong preference for action toys and edible treats. Sorry mom.

Agent Photos

Which fast food kid's meal treat do you prefer?



TOP KID'S MEAL TREAT

***Children's** Winner*	***Parents'** Winner*
Action Toys	Discovery Toys

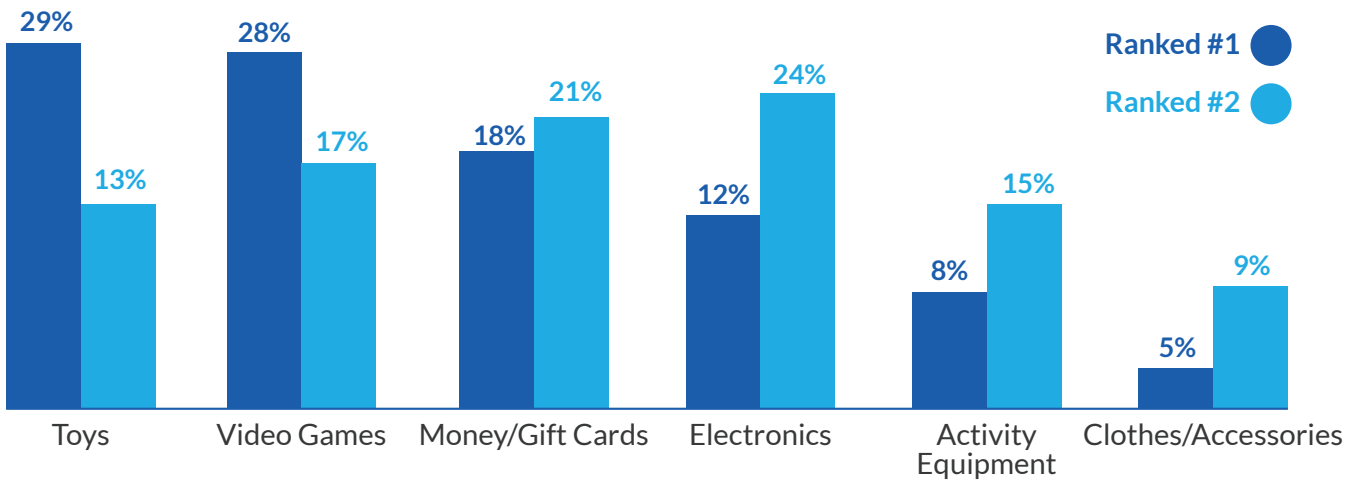
TOYS IN PERSPECTIVE: HOW DO TOYS STACK UP AGAINST OTHER GIFT CATEGORIES

"He's [Santa] loaded lots of toys and goodies on his sleigh." Toys and goodies; goodies and toys.

So the question is: ***How do toys stack up against other "goodies" under that Christmas tree?***
We asked kids to rank several gift categories.

Among kids, toys fared very well. Indeed, toys (29%) amassed the highest number of #1 responses, though video games eclipsed toys for #1 ***and*** #2 rankings.

Rank these HOLIDAY GIFTS by how much you want them this year, where 1 is the category you want most and 6 is the category you want least.



N = 1,193 kids 5-12 years old

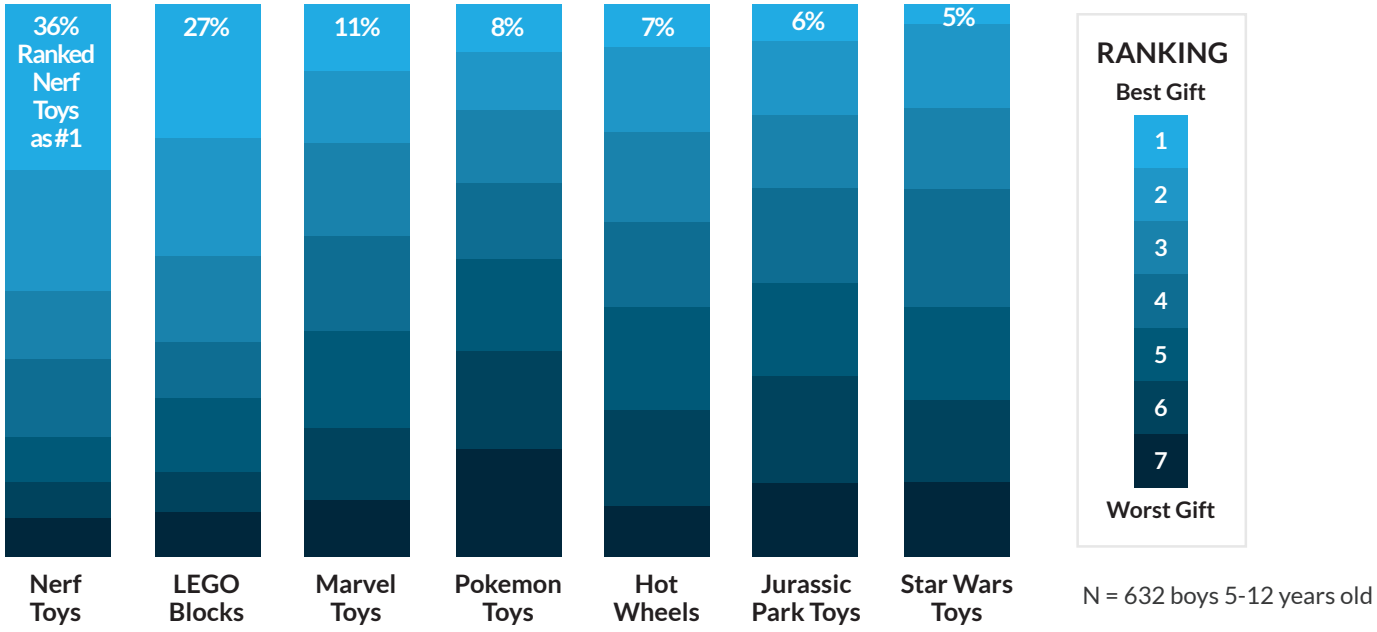
Agent Photos

WHAT BOYS WANT FOR CHRISTMAS

The toy industry is top heavy. Power brands and franchises—from Star Wars to Barbie, LEGO to Shopkins—enjoy the lion's share of shelf space inside stores, and possess remarkable sway over shoppers.

We asked boys 5-12 to rank toy franchises and brands by "how good [they] think they are as holiday gifts."

Rank the following toys by how good you think they are as HOLIDAY GIFTS, where 1 is the best and 7 is the worst.



N = 632 boys 5-12 years old

TOP 5 TOY WISHES

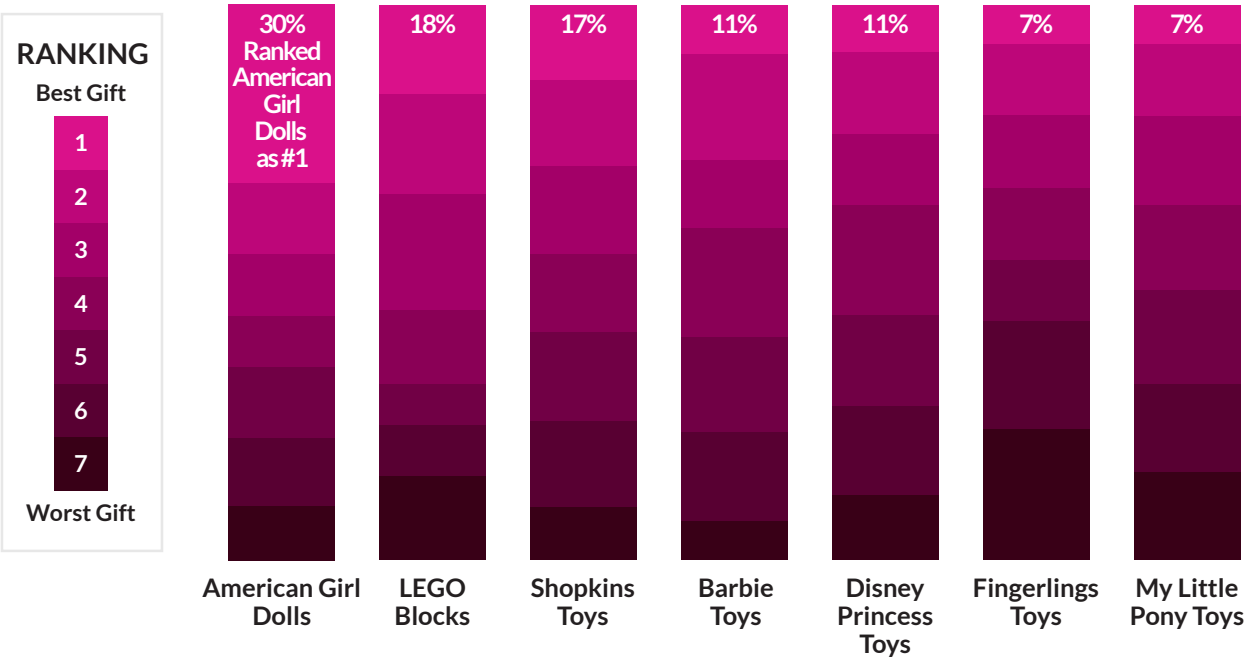
We also asked boys what one toy—not video games, not electronics, but toys—they want most this Christmas. This was a free form question with no choice options. Here are the top 5 responses:

1. LEGO block sets (e.g., Star Wars) – 22%
2. Nerf gun – 14%
3. Bicycle – 3%
4. Hot Wheels – 2%
5. Drone toy – 2%

WHAT GIRLS WANT FOR CHRISTMAS

And what about girls 5-12 years old? We also asked them to rank seven popular toy franchises, by their desirability as Christmas presents.

Rank the following toys by how good you think they are as HOLIDAY GIFTS, where 1 is the best and 7 is the worst.



N = 561 girls 5-12 years old

TOP 5 TOY WISHES

Girls were also given the chance to identify the one toy they most want for Christmas this year. Here, too, it was a free form question with no choice options.

1. American Girl doll/accessories – **12%**
2. Barbie & accessories – **9%**
3. L.O.L. Surprise! doll/accessories – **8%**
4. LEGO blocks – **7%**
5. Shopkins – **4%**

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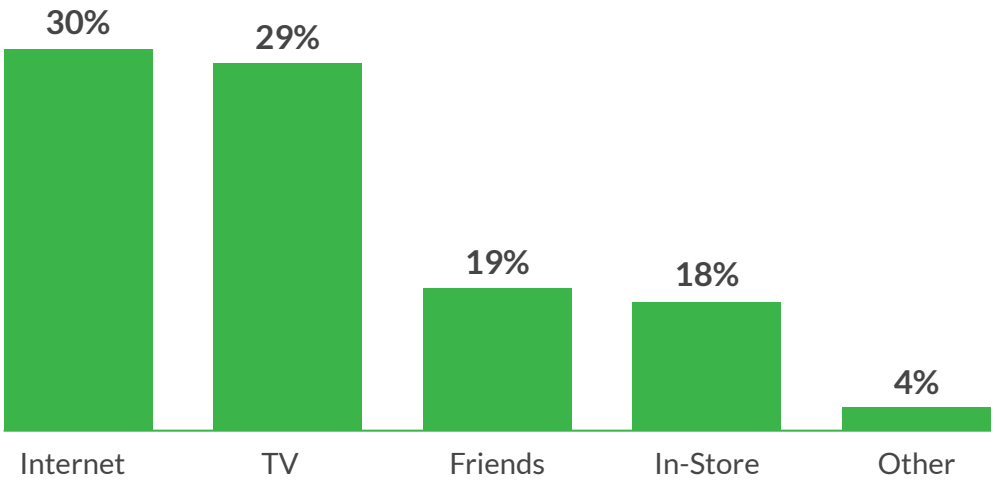
MAKING A WISH LIST: HOW CHILDREN LEARN ABOUT TOYS

For toy brands and toy-sellers, an important question remains: How do kids decide what toys they want in the first place? In other words, where do they learn about toys, and how, ultimately, does a toy get on a child's wish list?

We asked 1,193 kids how they most often discover/learn about the toys they want. The internet (30%) edged out TV (29%)—hard to believe if you grew up on Saturday morning cartoons.

How do you most often learn about the toys you want?



N = 1,193 kids 5-12 years old

Agent Photos

BONUS STAGE: KIDS & MOMS TALK VIDEO GAMES

KID'S CHOICE: VIDEO GAMES

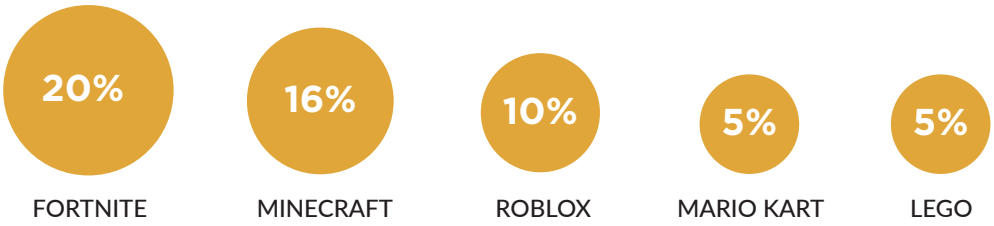
Which video games are currently tops with kids, and which games are they hoping to receive this holiday season (2018)?

We posed both questions to 966 kids ages 5-12 who play video games in a typical week. Because so many video games are available, we structured both as open-ended, free form questions.

Below we display the top five games kids are currently playing alongside the top five games they hope to be playing on Christmas Day.

MOST PLAYED:

What video game do you currently play the most?



Top Boy Game:	*Top Girl Game:*	*Ages 5-6*	*Ages 11-12*
Fortnite	Mario Kart	Minecraft	Fortnite

MOST WANTED:

What video game do you want most for the holidays this year?

Top Boy Game:	*Top Girl Game:*	*Ages 5-6*	*Ages 11-12*
Fortnite/Mincraft	Mario Kart	Minecraft	Call of Duty

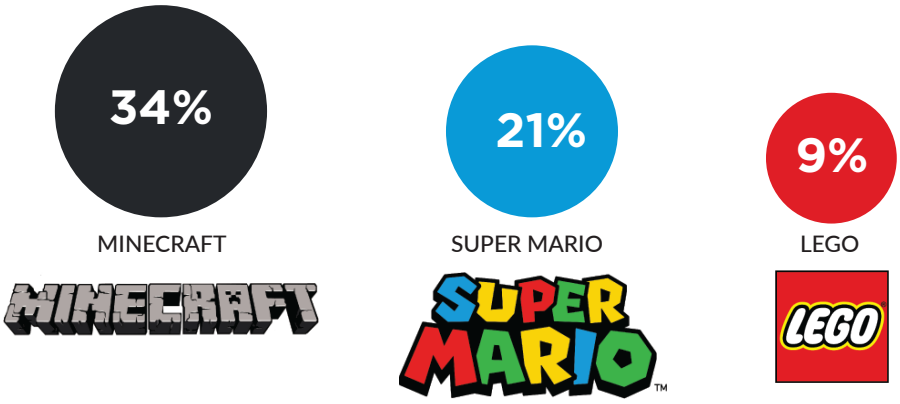
N = 966 kids 5-12 years old who play video games

KID'S CHOICE: FRANCHISES & CONSOLES

Field Agent also asked kids 5-12-years-old which video-game franchises and consoles they currently enjoy playing the most. A franchise, we explained to parents (who helped the child complete the survey), is a "general title or concept used for marketing a series of video games and/or related merchandise."

Among 14 popular franchises presented to the children[1], Minecraft and Super Mario were were most liked. And on the question of consoles, XBox One and PlayStation 4 beat out the likes of Nintendo Switch, Nintendo Wii, PC, Nintendo Wii U, Nintendo 3DS, and older Xbox and PlayStation models[2].

FRANCHISES KIDS CURRENTLY ENJOY PLAYING THE MOST:



CONSOLES KIDS CURRENTLY ENJOY PLAYING THE MOST:

N = 966 kids 5-12 years old who play video games

[1] In the order of their popularity, the 14 choice options were: Minecraft, Super Mario, LEGO, Disney (e.g., The Incredibles, Cars), Pokemon, NFL football, Marvel Comics (e.g., Spider-Man), Sonic the Hedgehog, NBA basketball, Major League baseball, Zelda, Star Wars, DC Comics (e.g., Batman), FIFA soccer. For this question, respondents could select "none of the above," but no option for "other" was provided. We included Minecraft as a franchise due to all the related merchandise available, but chose to exclude Fortnite because, at the time of the survey, the label could claim only one game, and little in the way of merchandise, to its name.

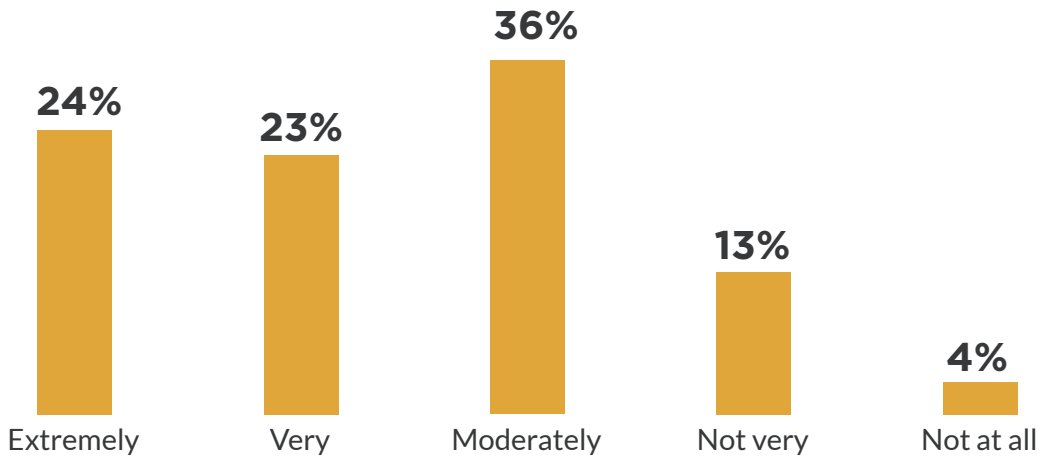
[2] For this question, Field Agent presented the 7 choice options above as well as an "other," write-in option, which garnered 12% and included "systems" like tablet computers, smartphones, Nintendo 64, etc.

DIFFICULTY LEVEL: MOMS & VIDEO GAMES

How do moms of video gamers (ages 5-12) feel about shopping for video games and related merchandise?

As you can see, most moms feel at least moderately knowledgeable when it comes to shopping for gaming gear. But that doesn't mean they don't get frustrated. Further below are some of mom's top frustrations, in their own words.

How knowledgeable do you feel shopping for and purchasing video games, VG consoles, and VG accessories for your kids?



N = 1,266 moms of video gamers

TOP 5 MOM FRUSTRATIONS WITH SHOPPING FOR VIDEO GEAR:

1. Prices: "High prices frustrate me when I am trying to purchase games and accessories for my children."

2. Violent/vulgar content: "I am not happy with some of the violent content in video games."

3. Determining appropriateness for kids: "Trying to find and determine what games are appropriate for my children's ages."

4. Out of stocks/availability: "My top frustration with video games is that it's a game that comes in limited stock and that they are hard to find."

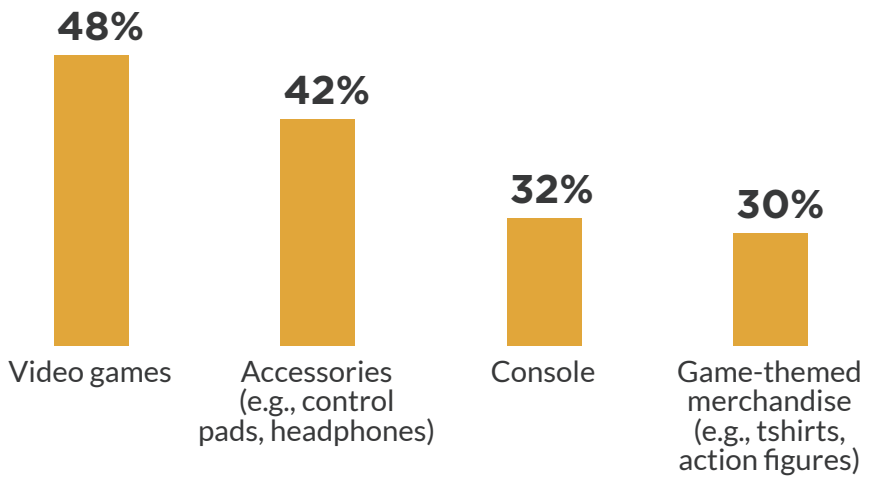
5. Determining what they'll like: "Multiple times we buy games they only play a few times and decide it's not for them, then I'm stuck with a $60 game…"

WILL VIDEO GAMES BE UNDER THE CHRISTMAS TREE?

How likely are moms to buy gaming gear for their kids this holiday season (2018)? We break it down by gaming category below, showing the percentage of moms ***completely or very likely*** to buy the category for their kids this Christmas.

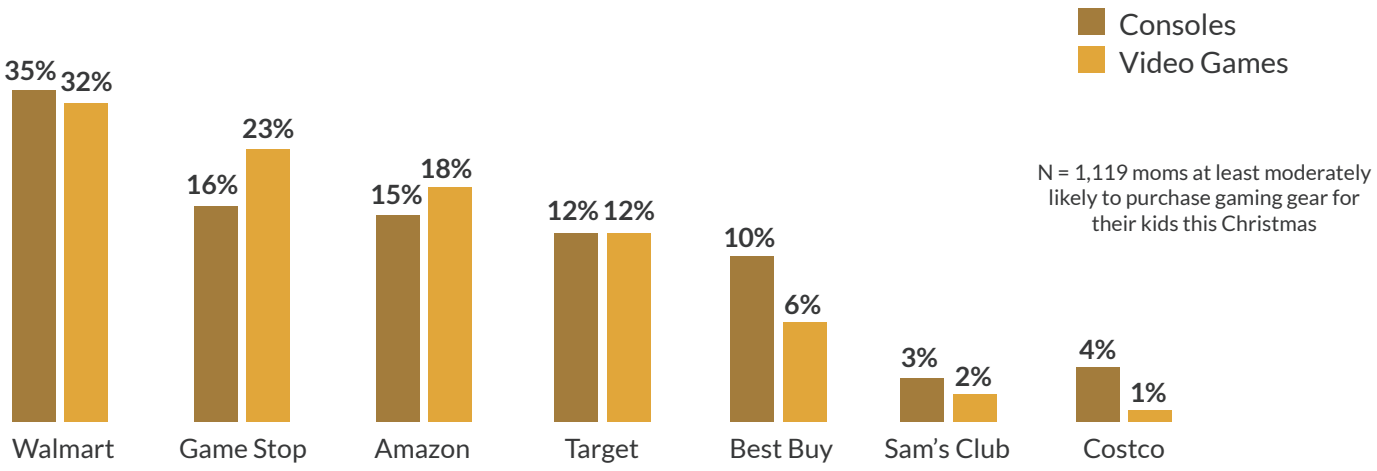
And which retailers are most likely to win those video-game dollars? Further below we show the top retailers for video game and console purchases.

% of moms completely or very likely to buy video gaming items for their kids this holiday season



N = 1,531 moms of 5-12 year olds

From which one retailer are you most likely to buy the following gaming products?



N = 1,119 moms at least moderately likely to purchase gaming gear for their kids this Christmas

Note: The following online retailers received no more than 1% for both categories above: Sony/PlayStation online store, Microsoft/Xbox online store, Nintendo online store, Steam

METHODS & DEMOS

For this report, Field Agent ran three mobile surveys October 3-9, 2018. Two surveys were directed at mothers of children ages 5-12 who are personally involved in purchasing toys for their kids ("mom surveys"), while the third survey was answered by children ages 5-12 with the assistance of a parent ("kid survey"). Surveys were conducted entirely through the Field Agent mobile app.

MOM SURVEY #1: N = 1,531 Moms of children ages 5-12

AGE:

18-24:	2%
25-34:	36%
35-44:	48%
45-54:	12%
55-64:	2%

RACE:

Caucasion or some combo:	60%
Latino/Hispanic or some combo:	17%
African American or some combo:	14%
Other:	9%

Note: Latino/Hispanic and African American responses were weighted to reflect 17% and 14%, respectively

HOUSEHOLD INCOME:

< $35K:	25%
$35-49K:	21%
$50-74K:	24%
$75-99K:	13%
$100K+:	13%
No answer:	5%

MOM SURVEY #2: N = 1,536 Moms of children ages 5-12

AGE:

18-24:	2%
25-34:	34%
35-44:	50%
45-54:	13%
55-64:	2%

RACE:

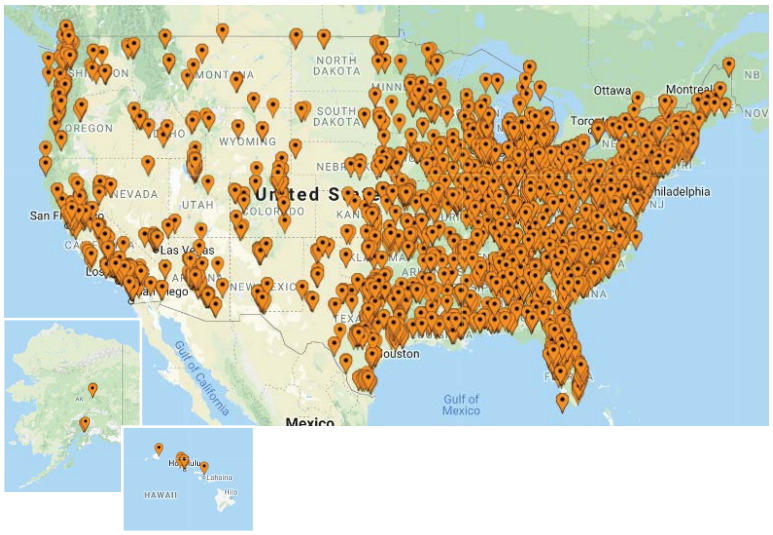
Caucasion or some combo:	61%
Latino/Hispanic or some combo:	17%
African American or some combo:	14%
Other:	7%

Note: Latino/Hispanic and African American responses were weighted to reflect 17% and 14%, respectively

HOUSEHOLD INCOME:

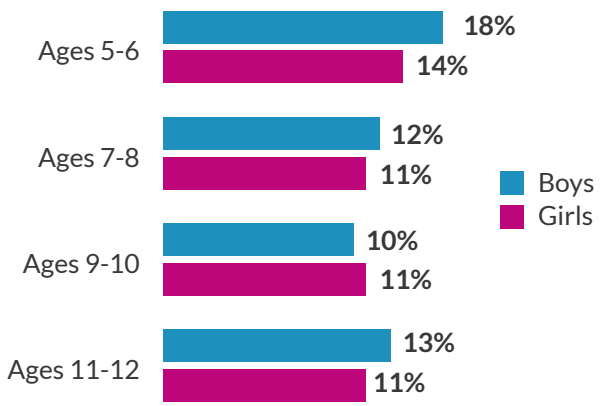
< $35K:	25%
$35-49K:	20%
$50-74K:	23%
$75-99K:	13%
$100K+:	14%
No answer:	5%

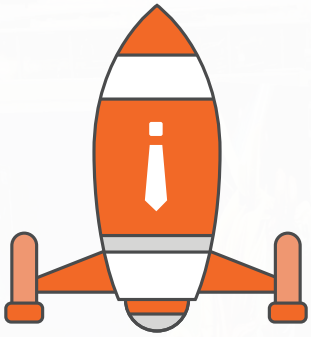
SURVEY LOCATIONS:



KID SURVEY: N = 1,193 Kids ages 5-12

Survey completed through a parent's Field Agent app account, with the assistance of that parent.





SOAR IN Q4

For many companies, the entire year rises and falls on this crucial three-month retail season. Field Agent crowdsources over a million smartphones to equip brands, retailers, and agencies with location-specific in-store information and insights—offering companies greater control over their retail execution.

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