

## CHILDREN'S TOYS AND CLOTHING VOLUME 8

**Audience:** 1,250+ US Consumers Balanced To Census

### KEY TAKEAWAYS:

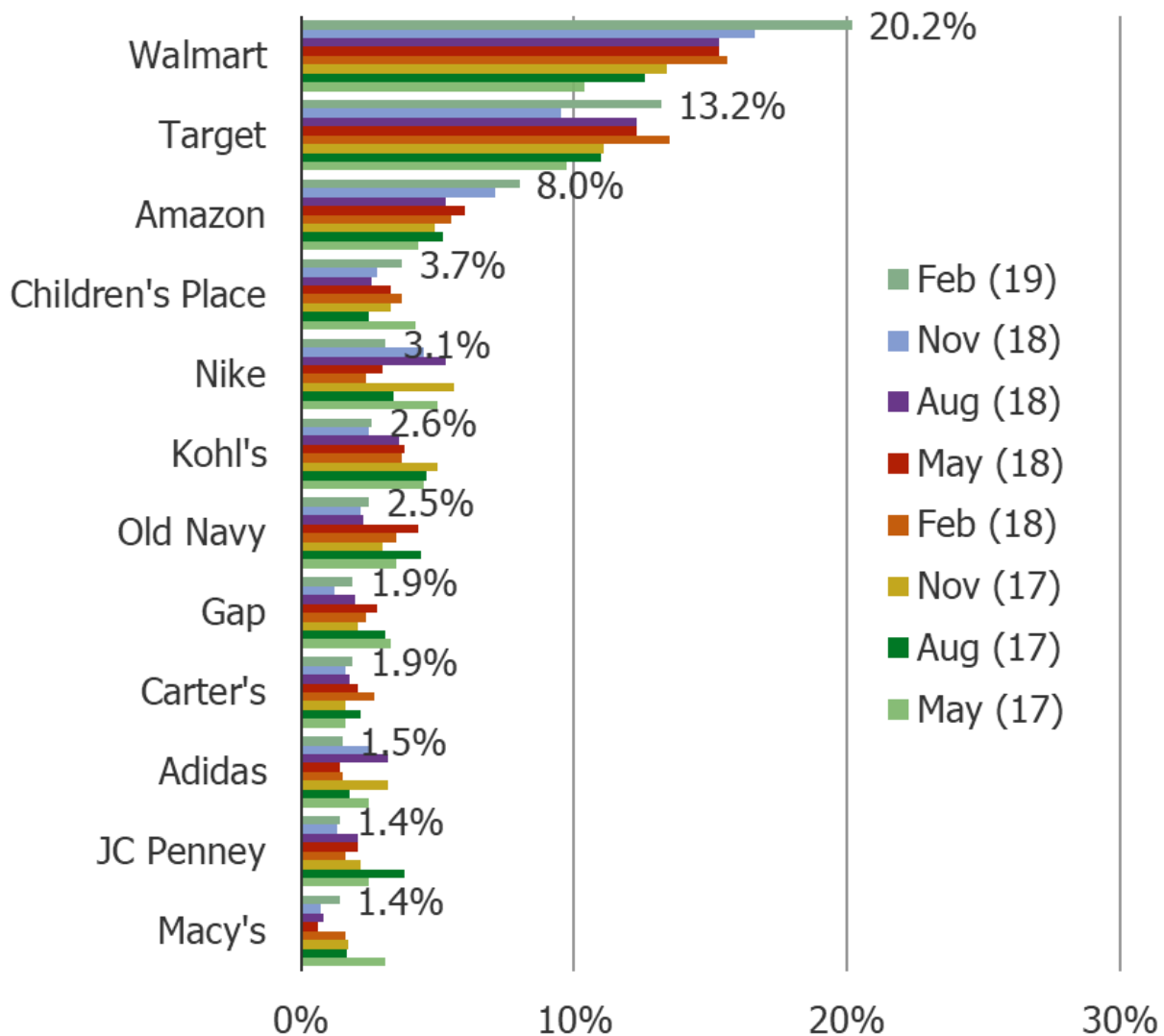
#### TOYS R' US TRAFFIC FLOW HEADING MOSTLY TO WAL-MART AND AMAZON

Respondents have been relying on Amazon, Wal-Mart, and Target more for toy purchases compared to a year ago as they shift away from Toys R Us. All three show signs of benefiting, but the trends are most favorable for Wal-Mart and Amazon.

#### AMAZON AND WAL-MART DOMINANT IN CHILDREN'S CLOTHING

Wal-Mart and Amazon have been consistently driving unaided mindshare higher for children's clothing among parents with children under 10 years old. Wal-Mart and Amazon have the top spots when it comes to purchases of children's clothing in the past year, followed by Target and Old Navy. Wal-Mart and Amazon purchasers also are the most likely to say their shopping frequency for children's clothing has increased over the past year.

### PARENTS | IF YOU WERE SHOPPING FOR CHILDREN'S CLOTHING AND APPAREL TODAY, WHICH WOULD YOU BE MOST LIKELY TO CHOOSE? (FILL-IN)

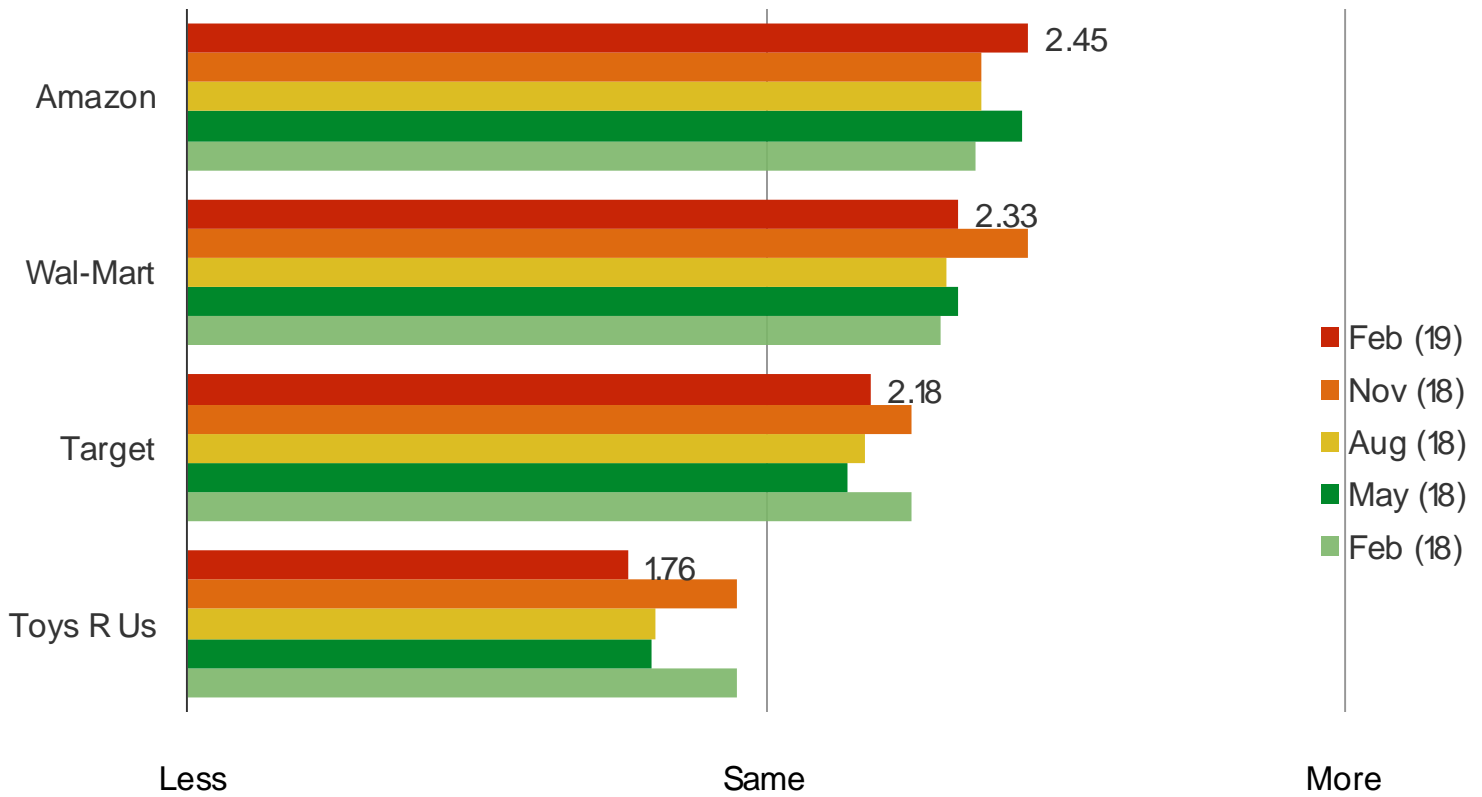


# TOYS

### Children's Clothing Retailer Mindshare

COMPARED TO A YEAR AGO, HAVE YOU BEEN RELYING ON ANY OF THE FOLLOWING MORE OR LESS FOR TOY PURCHASES?

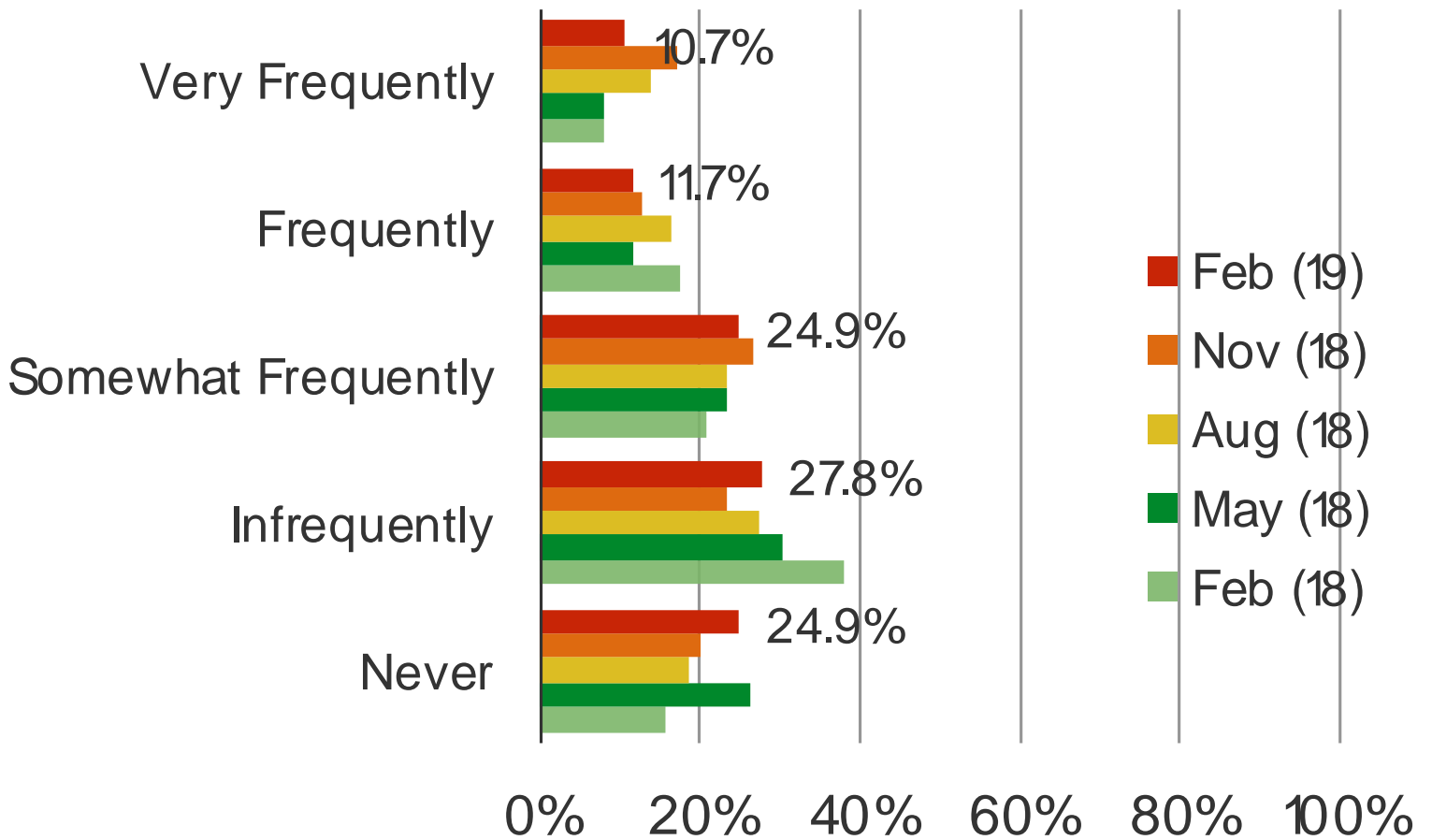
Posed to parents with children under 10 years-old.



Children's Clothing Retailer Mindshare

IN THE PAST, HOW OFTEN WOULD YOU TYPICALLY SHOP AT TOYS R US LOCATIONS?

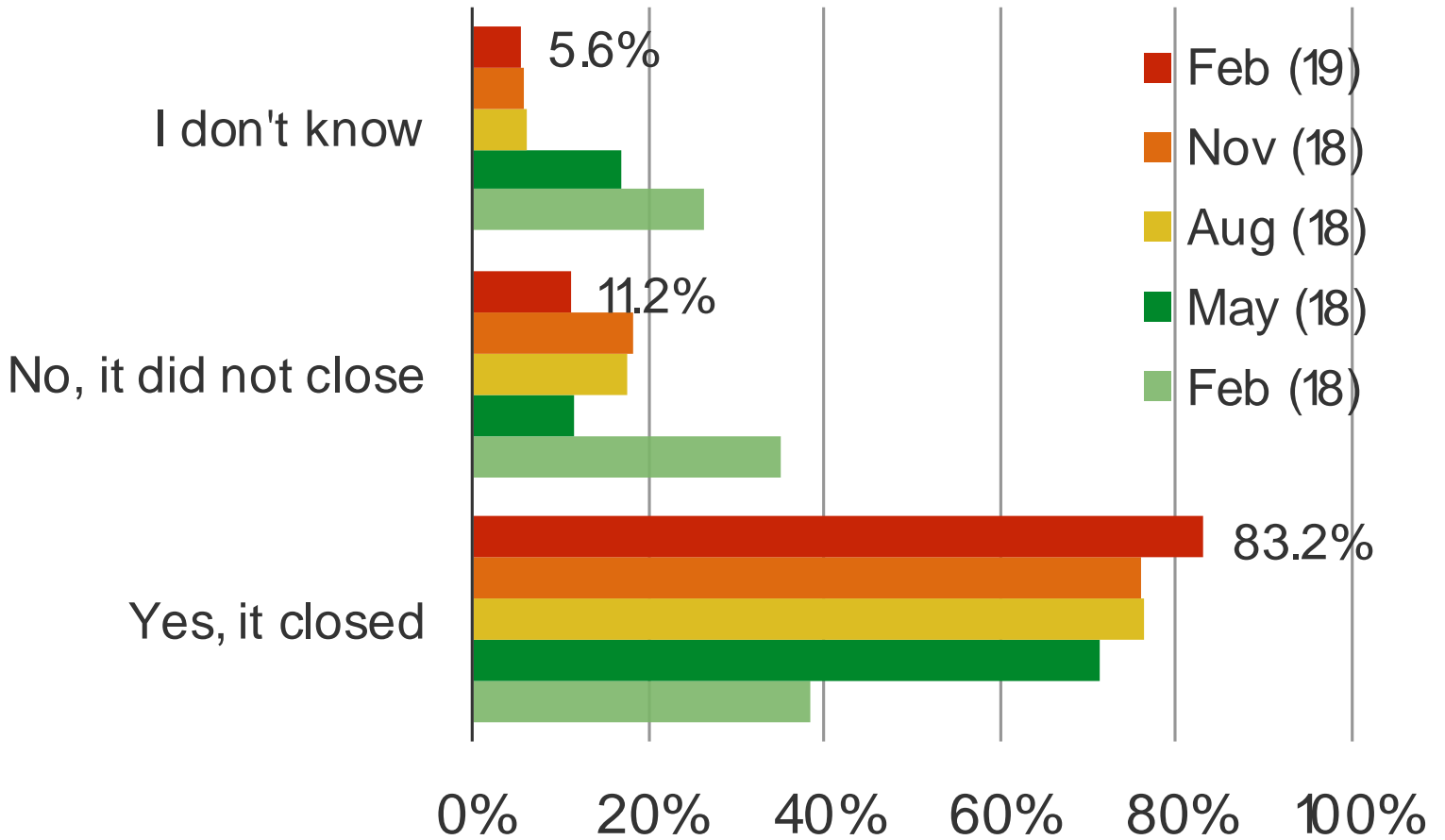
Posed to parents with children under 10 years-old.



Children's Clothing Retailer Mindshare

DID THE TOYS R US THAT YOU TYPICALLY GO TO CLOSE?

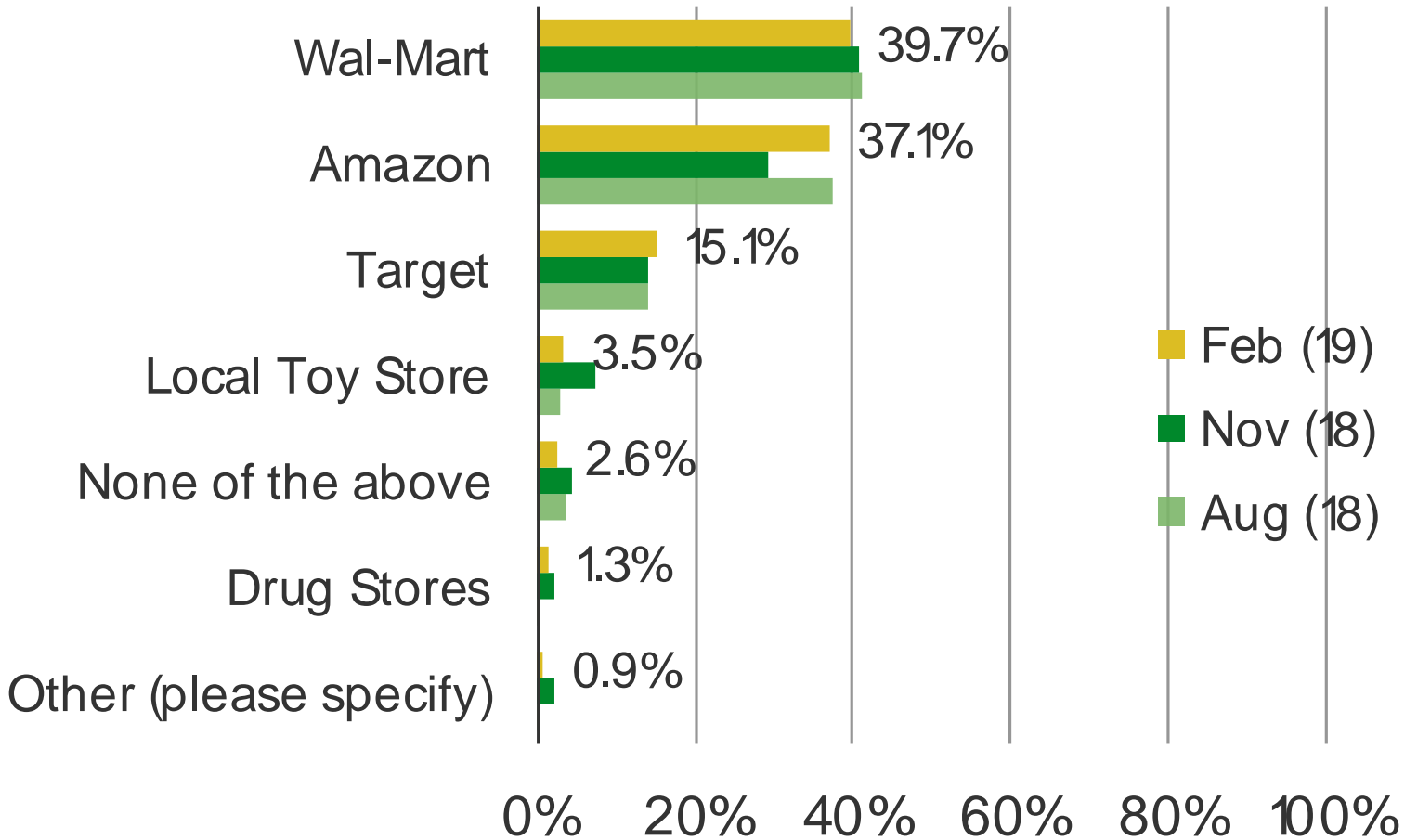
Posed to parents with children under 10 years-old who used to shop Toys R Us at least infrequently in the past.



Children’s Clothing Retailer Mindshare

WHICH RETAILER HAVE YOU BEEN RELYING ON MOST FOR ITEMS YOU WOULD HAVE TYPICALLY BEEN GETTING FROM TOYS R US?

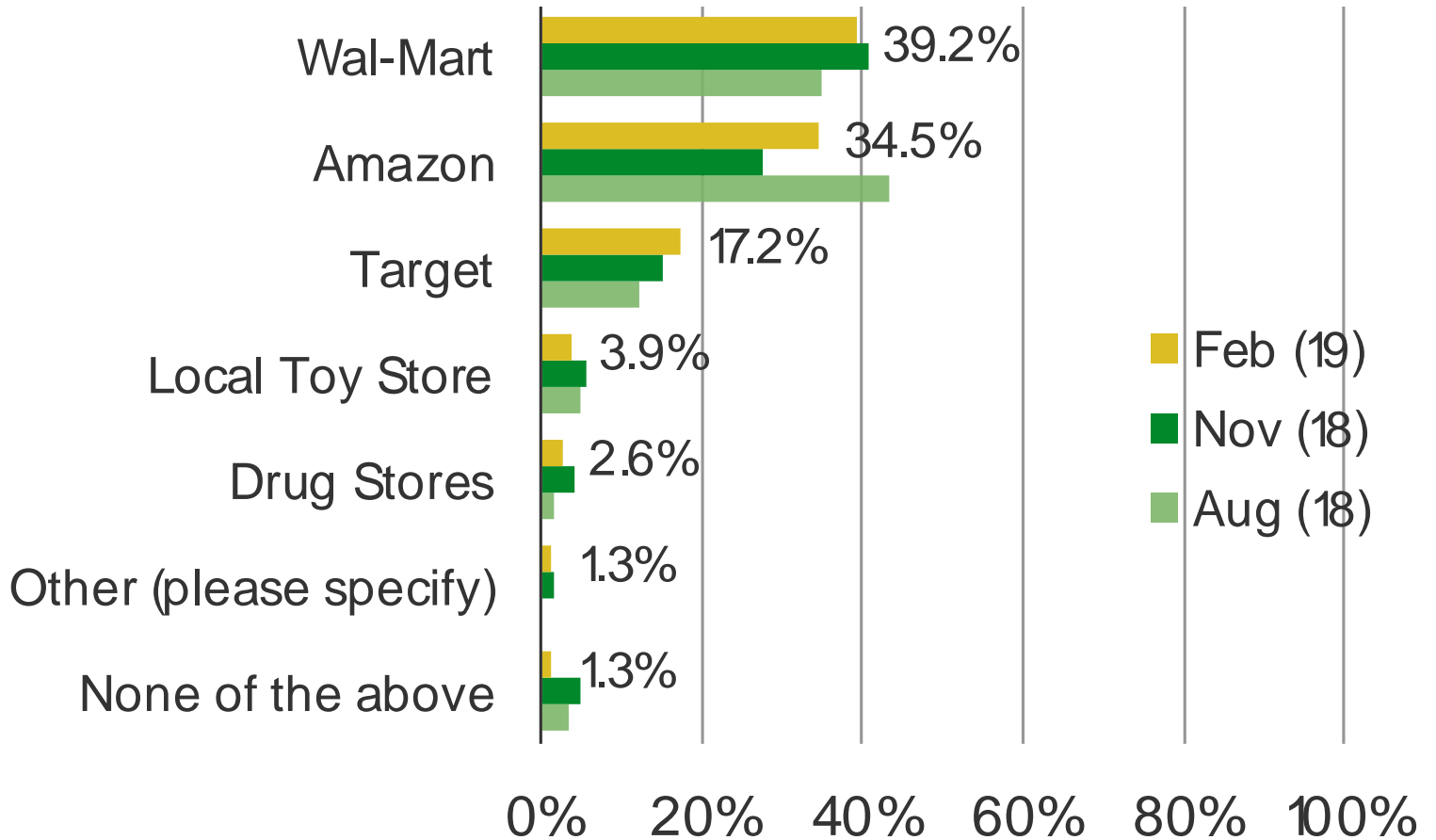
Posed to parents with children under 10 years-old who used to shop Toys R Us at least infrequently in the past.



Children’s Clothing Retailer Mindshare

GOING FORWARD, WHICH RETAILER DO YOU EXPECT TO RELY ON MOST FOR ITEMS YOU WOULD HAVE TYPICALLY BEEN GETTING FROM TOYS R’ US?

Posed to parents with children under 10 years-old who used to shop Toys R Us at least infrequently in the past.



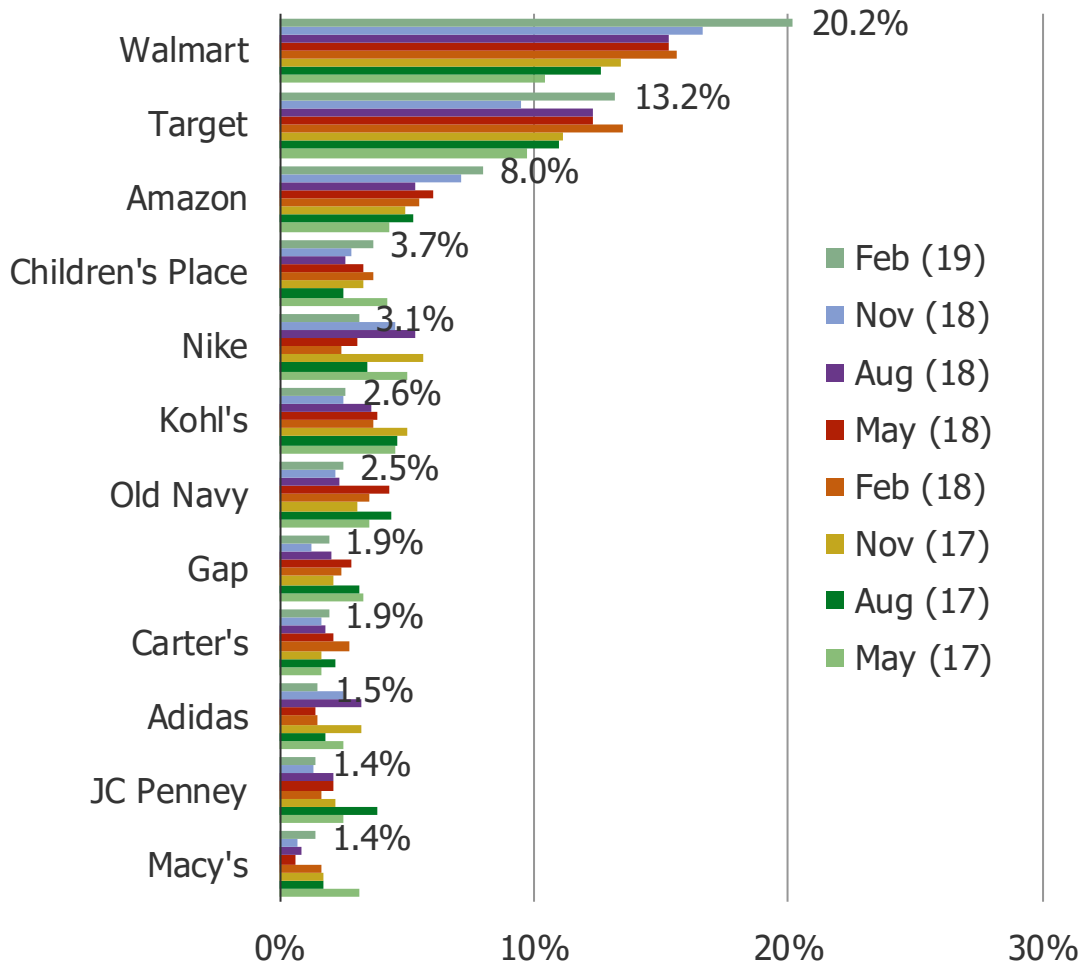
## CHILDREN'S CLOTHING



Children's Clothing Retailer Mindshare

WHEN YOU THINK ABOUT BUYING YOUR CHILDREN (UNDER 10) CLOTHING OR APPAREL, WHERE WOULD YOU THINK OF FIRST TO GET IT?

Posed to parents with children under 10 years-old.

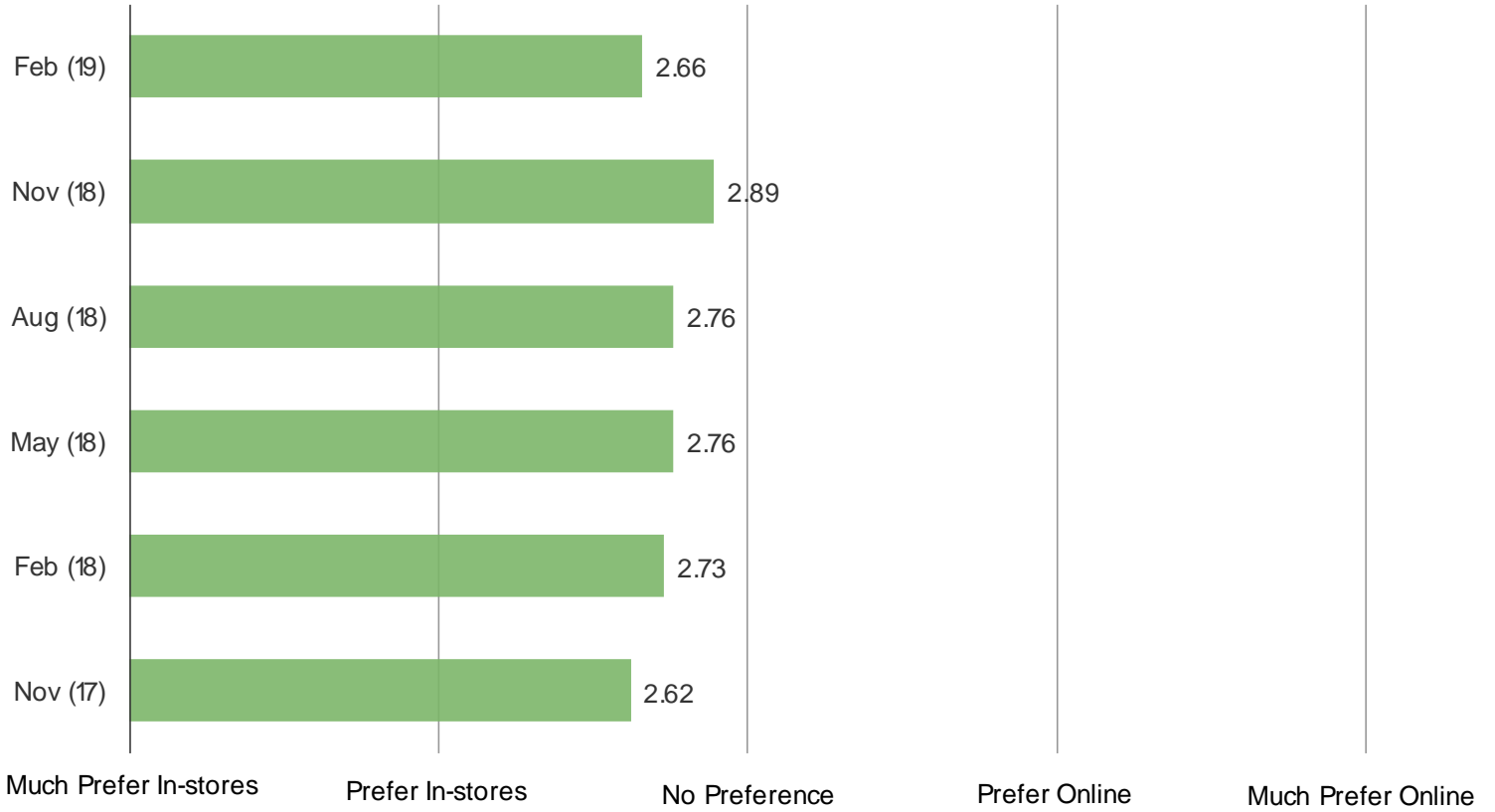


Retailer	May (17)	Aug (17)	Nov (17)	Feb (18)	May (18)	Aug (18)	Nov (18)	Feb (19)	Q/Q	Y/Y
Walmart	10.4%	12.6%	13.4%	15.6%	15.3%	15.3%	16.6%	20.2%	3.6%	4.6%
Target	9.7%	11.0%	11.1%	13.5%	12.3%	12.3%	9.5%	13.2%	3.7%	-0.3%
Amazon	4.3%	5.2%	4.9%	5.5%	6.0%	5.3%	7.1%	8.0%	0.9%	2.5%
Children's Place	4.2%	2.5%	3.3%	3.7%	3.3%	2.6%	2.8%	3.7%	0.9%	0.0%
Nike	5.0%	3.4%	5.6%	2.4%	3.0%	5.3%	4.5%	3.1%	-1.4%	0.7%
Kohl's	4.5%	4.6%	5.0%	3.7%	3.8%	3.6%	2.5%	2.6%	0.1%	-1.1%
Old Navy	3.5%	4.4%	3.0%	3.5%	4.3%	2.3%	2.2%	2.5%	0.3%	-1.0%
Carter's	1.6%	2.2%	1.6%	2.7%	2.1%	1.8%	1.6%	1.9%	0.3%	-0.8%
Gap	3.3%	3.1%	2.1%	2.4%	2.8%	2.0%	1.2%	1.9%	0.7%	-0.5%
Adidas	2.5%	1.8%	3.2%	1.5%	1.4%	3.2%	2.5%	1.5%	-1.0%	0.0%
Macy's	3.1%	1.7%	1.7%	1.6%	0.6%	0.8%	0.7%	1.4%	0.7%	-0.2%
JC Penney	2.5%	3.8%	2.2%	1.6%	2.1%	2.1%	1.3%	1.4%	0.1%	-0.2%

Children's Clothing Retailer Mindshare

DO YOU PREFER TO BUY CHILDREN'S CLOTHING IN-STORES OR ONLINE?

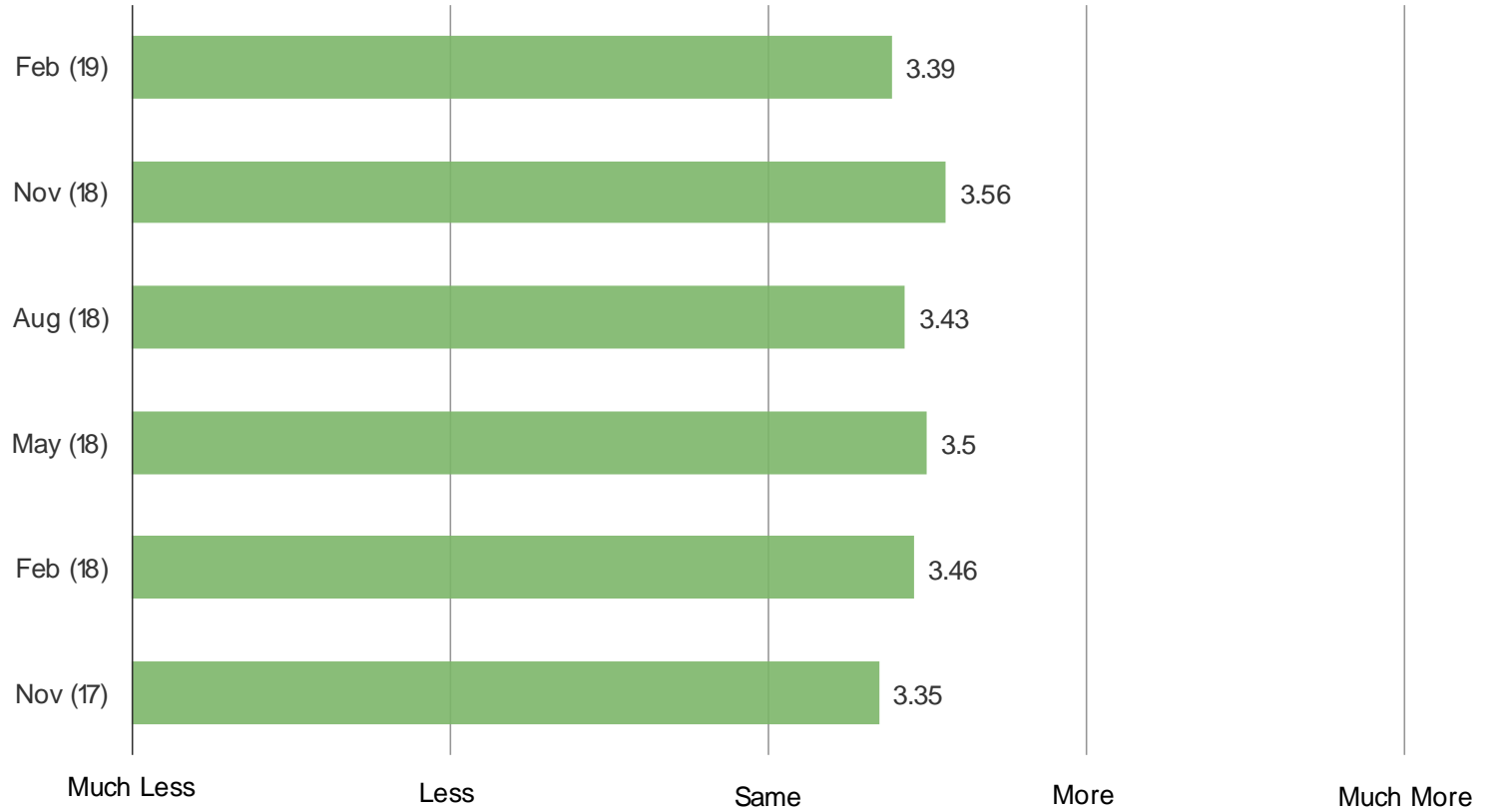
Posed to parents with children under 10 years-old.



Children's Clothing Retailer Mindshare

COMPARED TO ONE YEAR AGO, ARE YOU BUYING CHILDREN'S CLOTHING ONLINE MORE OR LESS?

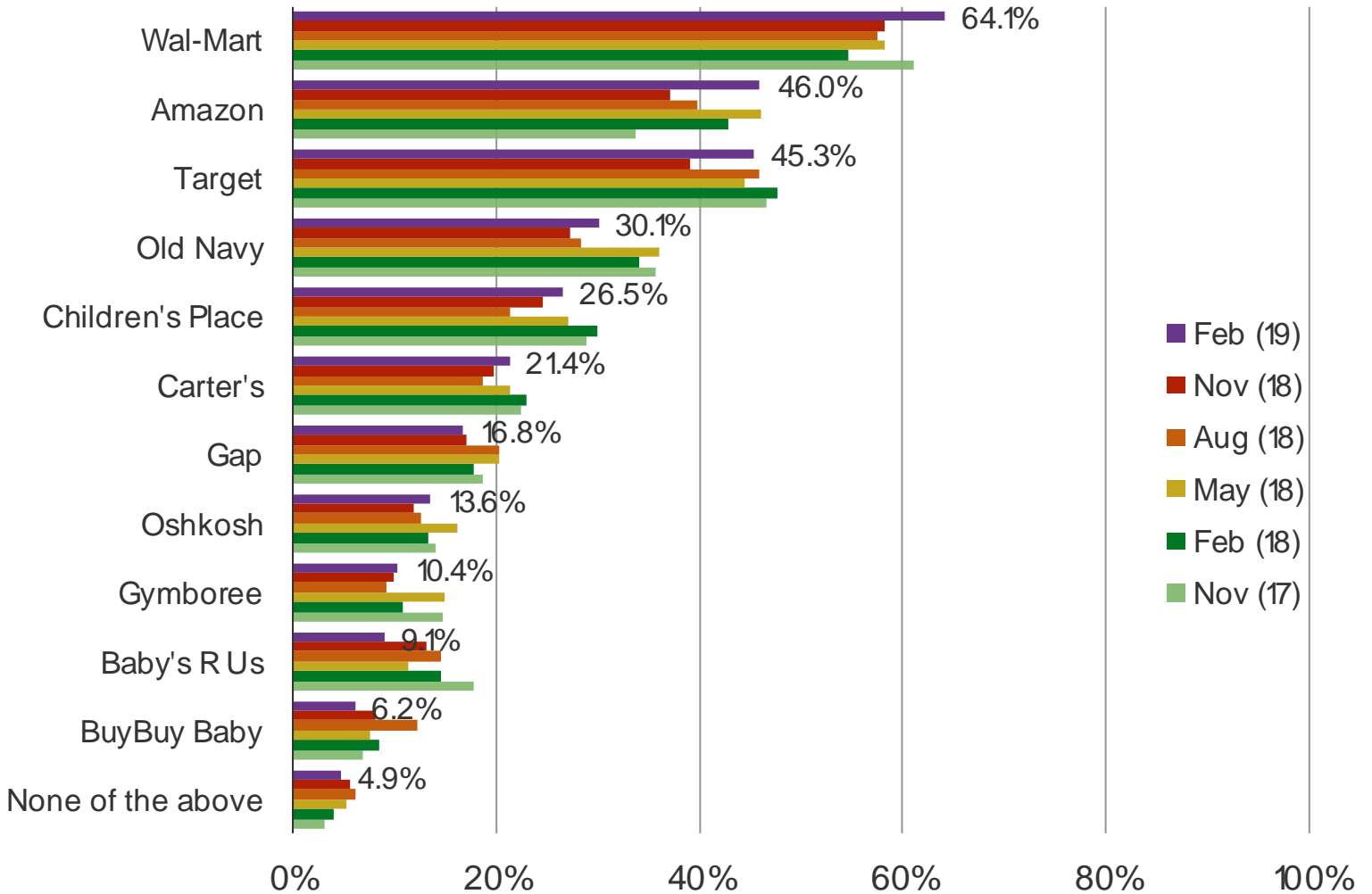
Posed to parents with children under 10 years-old.



Children's Clothing Retailer Mindshare

BOUGHT CHILDREN'S CLOTHING FROM IN THE PAST YEAR

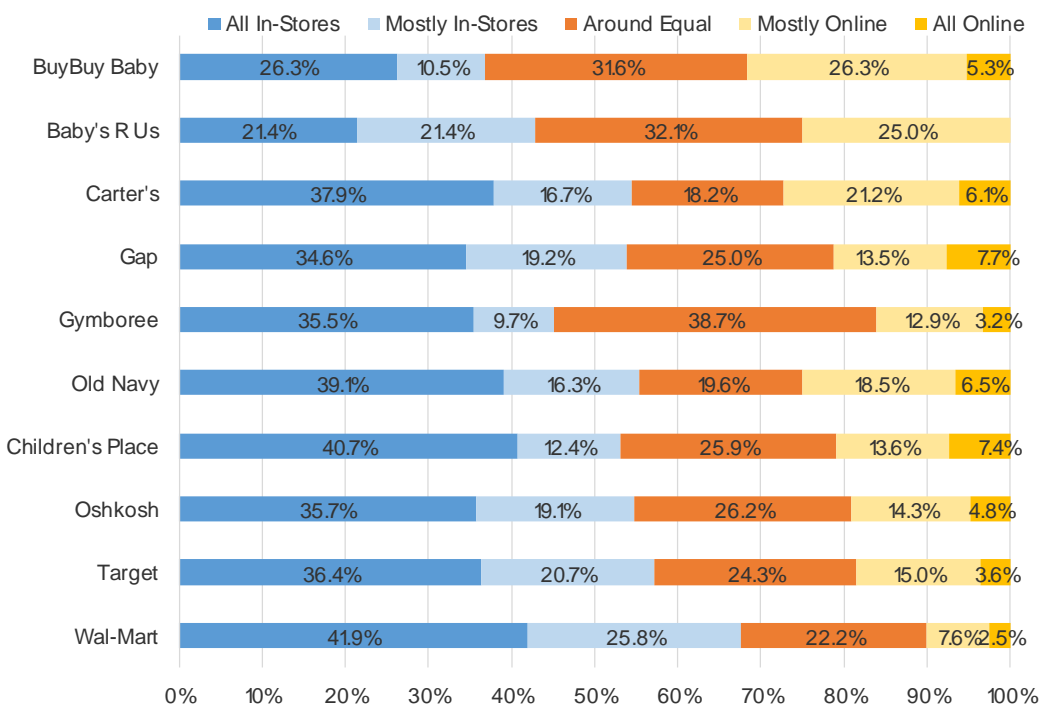
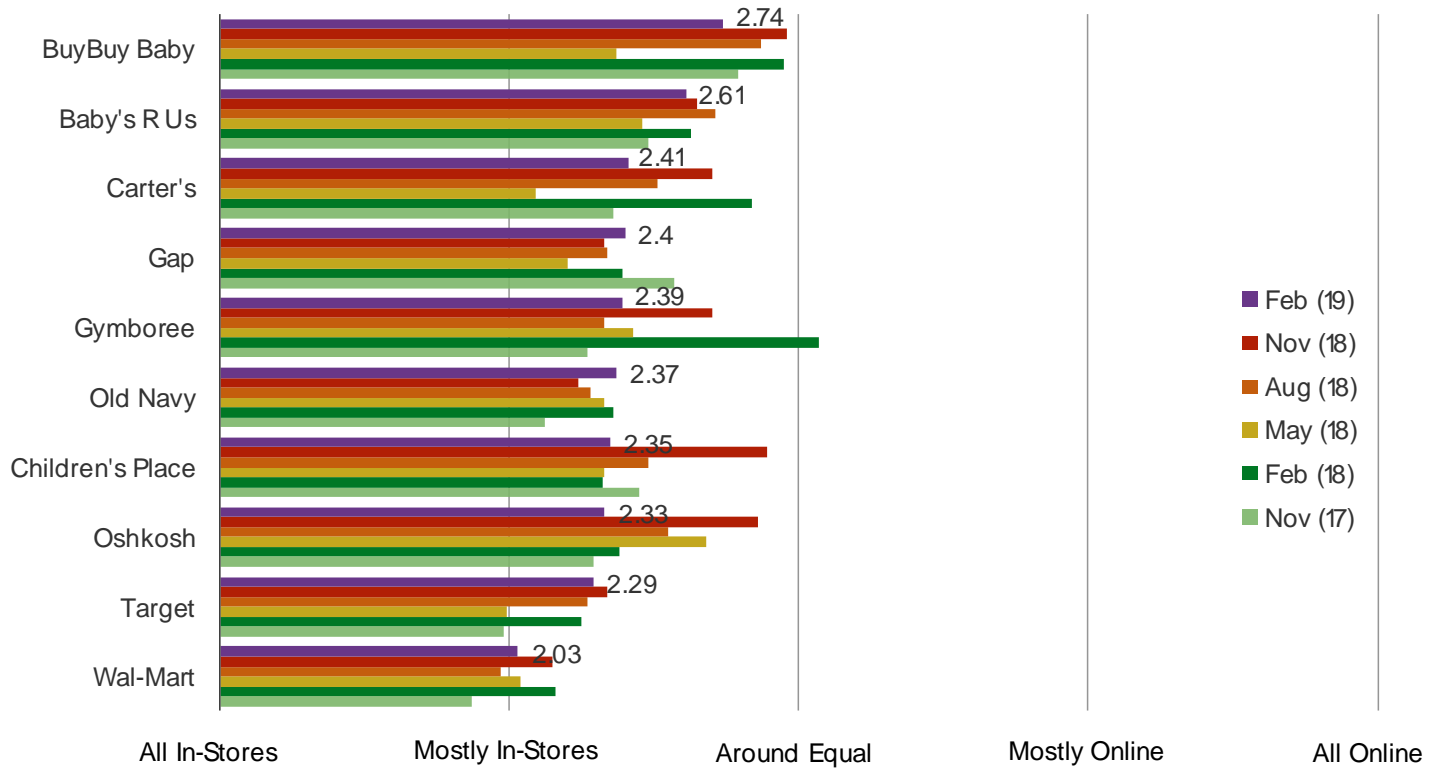
Posed to parents with children under 10 years-old.



Children's Clothing Retailer Mindshare

DO YOU SHOP FROM HERE IN STORES OR ONLINE?

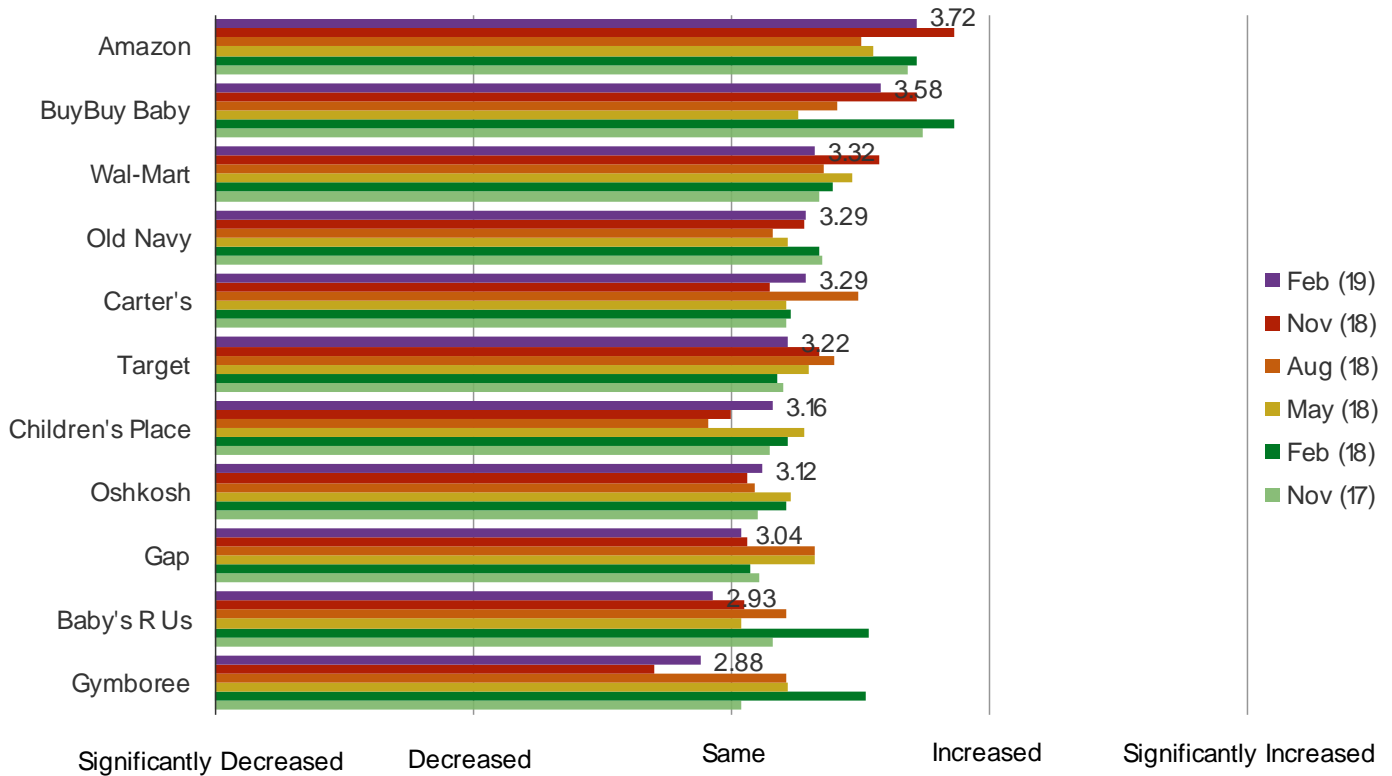
Posed to parents with children under 10 years-old who shopped each retailer in the past year.



Children's Clothing Retailer Mindshare

OVER THE COURSE OF THE PAST YEAR, HAS YOUR SHOPPING FREQUENCY HERE CHANGED (IN-STORES OR ONLINE)?

Posed to parents with children under 10 years-old who shopped each retailer in the past year.



Significantly Decreased    Decreased    Same    Increased    Significantly Increased

