



ATA Report

December 2015

Copyright 2015. The NPD Group, Inc. All Rights Reserved. This presentation is **proprietary and confidential** and may not be disclosed in any manner, in whole or in part, to any third party without the express written consent of NPD.

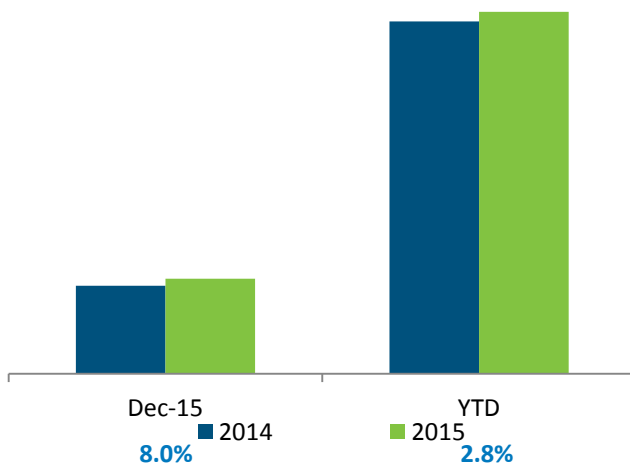


Industry Trends

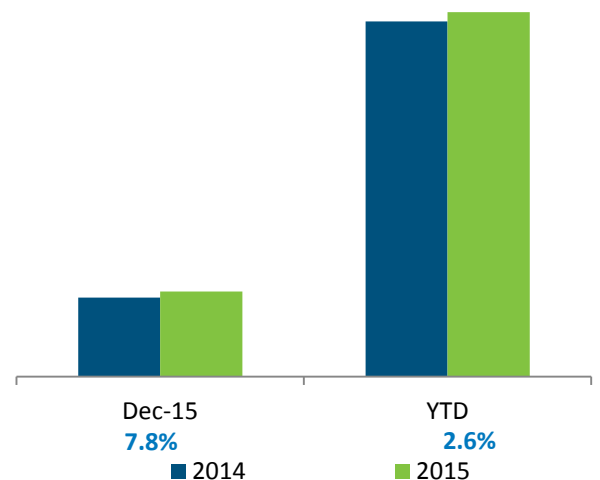
2015 has now concluded and the results are in for the year. Christmas 2015 proved to be very successful for the Australian toys industry, growing 8% in value and 7.8% in units during December 2015 compared to December 2014. This strong growth can be largely attributed to the success of the Star Wars license, with sales driven by the release of the much anticipated *Star Wars E7: The Force Awakens*. Star Wars sales alone comprised 7.8% of all toy sales in December 2015.

Over the course of 2015, the market grew 2.8% in value and by 2.6% in units.

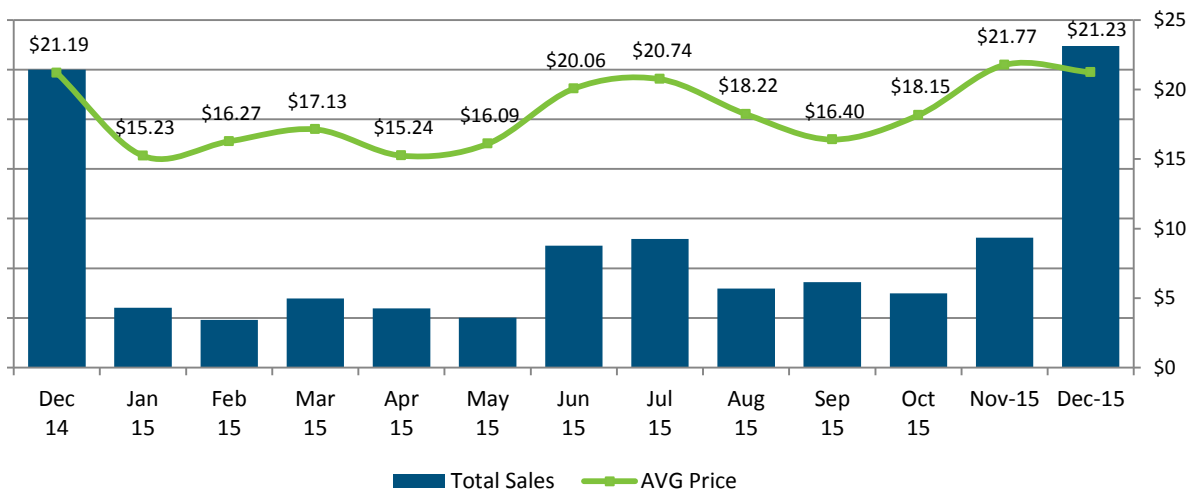
Value (\$m)



Units (m)

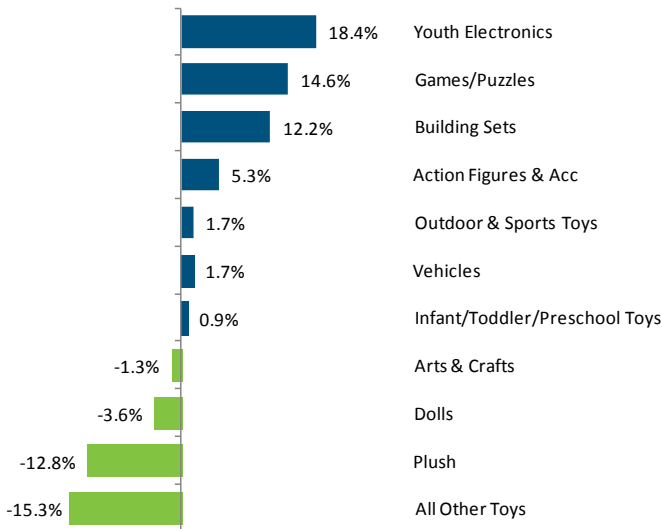


Monthly Value (\$m) and Average Price



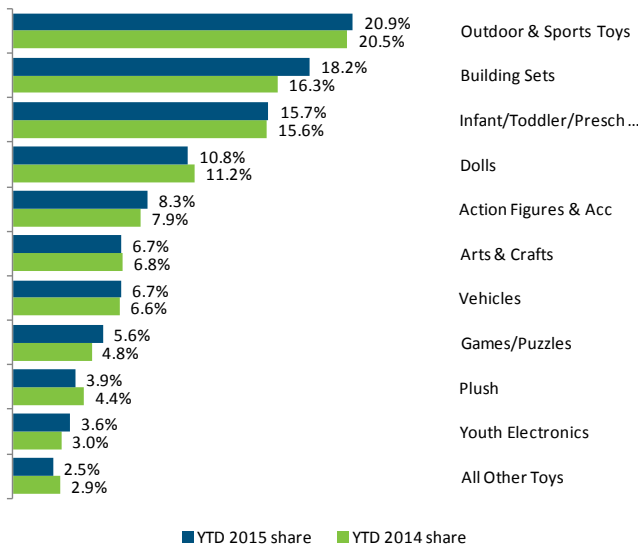
Category Trends

Value Change YTD

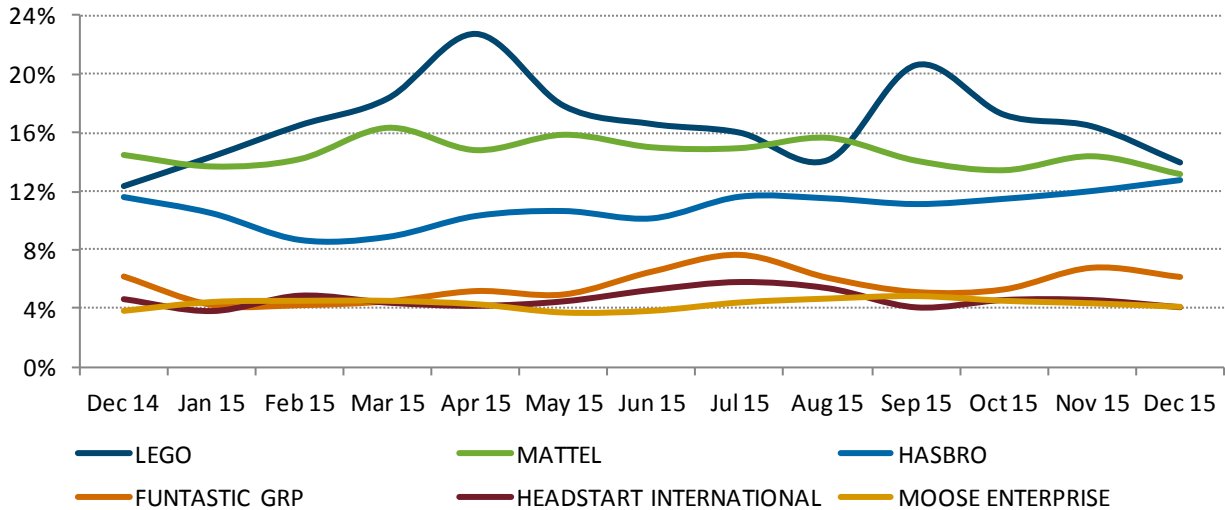


- 7 out of the 11 categories grew during 2015, while 4 categories declined compared with 2014.
- *Youth Electronics* grew 18.4% during 2015, making it the highest growth category in the toys industry. This growth has largely been driven by Little Live Pets, Zoomer and Star Wars
- *Games & Puzzles* is the second fastest growing category, with 2015 adding an additional \$8.5m of sales compared with 2014, with value drivers including Monopoly, Star Wars and Despicable Me – Minions.
- The 3 biggest value drivers for the *Building Sets* category were Star Wars, Minecraft and Ninjago, who together added \$22.2m in the YTD to the category.
- With many of the Star Wars toys sitting in *Action Figures*, this category enjoyed solid growth of 5.3% in the YTD, assisted also by Avengers and Jurassic World.
- *All Other Toys* declined -15.3% during 2015, suffering a significant loss in the minor category of *Childrens Furniture*, which was down -\$5.1m in YTD compared with last year.

Category Share YTD



Distributor Trends



The battle for the top distributor position in December 2015 was extremely tight, with just 1% market share separating top ranked LEGO and 3rd ranked Hasbro. Together, LEGO, Mattel and Hasbro accounted for 40% of all toy sales during December 2015. Funtastic came in at 4th during December, followed by Moose and Headstart.

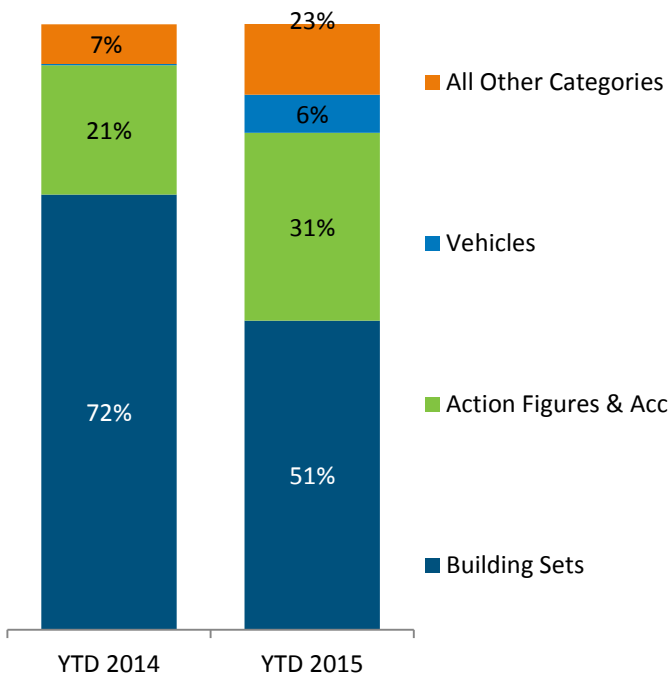
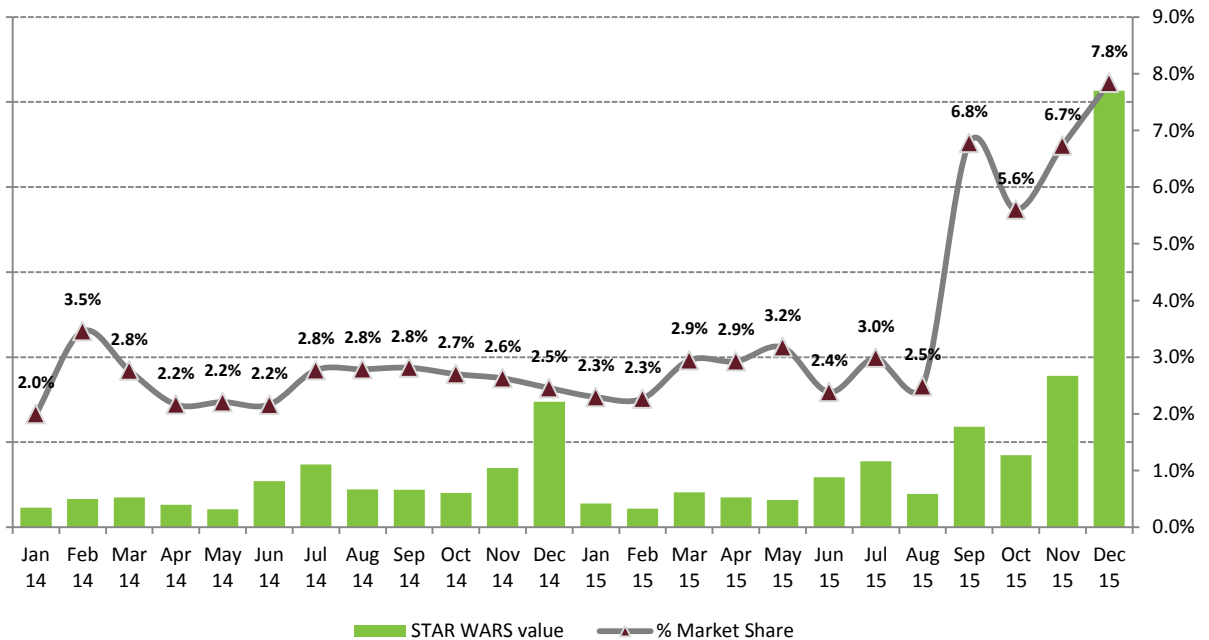
Property Trends

Rank	Top 20 Properties	Rank	Rank	Rank
Dec-15		Nov-15	Oct-15	YTD
1	Star Wars	1	1	1
2	City	2	2	2
3	Nerf	11	7	8
4	Disney Frozen	7	5	3
5	Shopkins	4	3	6
6	Barbie	9	10	9
7	Fisher Price	3	6	4
8	Razor	6	11	13
9	Thomas & Friends	8	4	5
10	Friends	5	8	7
11	Little Tikes	10	9	10
12	Laugh & Learn	15	24	14
13	Hot Wheels	16	12	15
14	X-Shot	36	37	42
15	Crayola	22	14	18
16	Paw Patrol	13	22	26
17	Disney Princess	14	13	11
18	Despicable Me - Minions	19	23	12
19	Wahu	35	32	38
20	Little Live Pets	21	18	24

December 2015 brought no surprises in terms of the top ranked property, with Star Wars leading the pack. With the release of Star Wars E7, the property has added significant value in December 2015, with most of these sales coming from Building Sets and Action Figures & Accessories.

Nerf also had highly successful December, sneaking into 3rd position, just after LEGO's City. This compares Nerf's YTD ranking of 8th position. Blasters/Shooters generally performed solidly during the Christmas period, with X-Shot also sneaking into 14th position, up from it's YTD ranking of 42nd.

Star Wars License



As demonstrated by the above, the release of Star Wars E7 has had a significant impact on sales of Star Wars toys, with the Star Wars license accounting for 7.8% of all Australian toy sales in December 2015. By way of comparison, in December 2014 Star Wars comprised just 2.5% of sales.

During 2015, Star Wars toys also significantly diversified into other categories. In 2014, 72% of sales of Star Wars toys were from the Building Sets category, while in 2015 this figure has dropped to 51%. Both Action Figures and Vehicles represent a significantly higher share of Star Wars sales in 2015 than in 2014.

Thank You



Industries

Automotive
Beauty
Consumer Electronics
Entertainment
Fashion
Food / Foodservice
Home
Luxury
Mobile
Office Supplies
Sports and Leisure
Trends
Technology
Toys
Video Games

Countries

Australia
Belgium
Brazil
Canada
China
France
Germany
India
Italy
Japan
Mexico
Netherlands
New Zealand
Poland
Russia
South Korea
Spain
Sweden
Turkey
United Kingdom
United States

Keep up with what's new at The NPD Group.

Subscribe to our newsletter and other communications by visiting npd.com and clicking "Subscribe."

Contact OZToys

Lee Schofield

Account Manager

T: (02) 8257 6424

M: +61 (0) 499 000 233

E: lee.schofield@npd.com

Miguel Velasquez

Account Manager

T: (02) 8257 6424

M: +61 (0) 418 500 547

E: miguel.velasquez@npd.com