

**BrandMonitor**

ONLINE, LEGAL AND INVESTIGATIONS

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# **FAKE TOYS**

**MARKET VOLUME AND CONSUMER ATTITUDE**

# FAKE TOYS: MARKET VOLUME AND CONSUMER ATTITUDE

A huge number of children's toys are sold in Russia every year. While sales may falter during crises, they quickly recover and even grow bigger once those are over. The global toy market is currently on the rise, despite the COVID-19-related crisis.

Surveys of the children's toy market normally only take legal products into account, although a substantial portion of toys are fakes and not included in reports. Our survey is specifically concerned with the counterfeit toy market in Russia, providing an estimation of its current size as well as describing its distribution channels and models of consumer behavior.

## METHODOLOGY

The data was collected through online polling. The sample size was 1,000 interviews. The sample represents Russian adults aged 18 to 55, living in cities with a minimum of 100,000 residents. The survey data was collected in March 2020.

## COUNTERFEITS IN THE TOY MARKET

**1/4** of children's toys are fakes



counterfeit toys are most commonly sold in brick-and-mortar stores



the most frequently faked toys include dolls, robots, and action figures



fakes are almost half the price of originals

**Fakes constitute a quarter of the toy market.** Our research showed that the market size of counterfeit toys reached ₺30 bn last year, compared to ₺100 bn in legal sales for the same period.

**The vast majority of fake toys are sold through offline channels.** The overwhelming majority of fake goods (86%) are sold through offline channels, including stores and markets. Total annual sales in these channels are estimated at ₺26 bn. The share of online sales is 14%, or ₺4 bn worth of fake toys a year. Of these, ₺3 bn are made in sales through Russian online stores, while social networks, online forums and foreign online stores account for another ₺1 bn.

**The most frequently counterfeited toys are dolls, robots, and action figures.** The share of fakes varies by toy categories. The least commonly faked toys are in the categories of learning and development toys (17%), plush toys (18%), and musical toys (19%). The highest rates of fakes are observed in the categories of toy weapons (30%), dolls (30%), toy robots (35%), and action figures and collectibles (39%).

**Fakes are almost half the price of originals.** The average price of a genuine doll is ₺1,200 and a fake one will cost ₺500; an original toy train set costs ₺2,000, while a fake costs ₺800; an original toy robot has a price tag of ₺1,200, with a fake priced at ₺600.

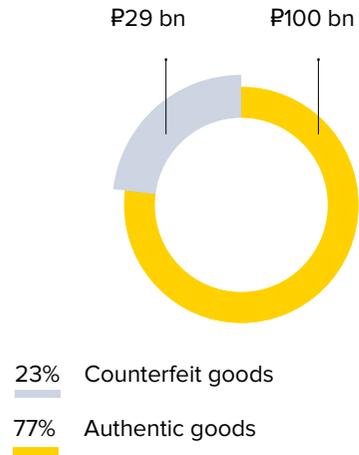
## CONSUMER BEHAVIOR

**Over a half of Russians living in cities purchase children's toys on a regular basis.** 56% of city dwellers purchased various kind of toys over the past year. Of these, women made such purchases more often: 67% of female respondents answered affirmatively compared to only 45% of male respondents. Toys most favored by Russians include learning and development toys (with 52% of respondents having purchased them in the past year), plush toys (44%), construction sets (43%), and vehicles and machines (38%). Interestingly, women were more likely than men to buy toys for toddlers: for example, 57% of surveyed women purchased development toys compared to only 43% of male respondents. In the musical toys category, this ratio was 28% to 18%; in bathtub toys, 25% to 12%; in sandbox toys, 21% to 6%; and in pretend play sets, 18% to 12%.

**The average price of toys in Russia is ₺650.** Russians tend to buy inexpensive toys: 42% of all purchases had a price tag of up to ₺500. Another 23% of all toys cost between ₺501 and ₺1,000. Around 20% of toys purchased by Russian city dwellers last year were priced between ₺1,001 and ₺2,000. Toys priced between ₺2,001 and ₺3,000 made up 9% of total purchases, with more expensive toys (>₺3,000) constituting 6%.

**People buy on average 7 toys a year.** About two thirds of respondents (63%) buy up to 10 toys every year: of these, 18% purchase one or two, 25% three to five, and 24% six to ten. At the same time, a third of respondents (37%) said they purchase more than 10 toys a year.

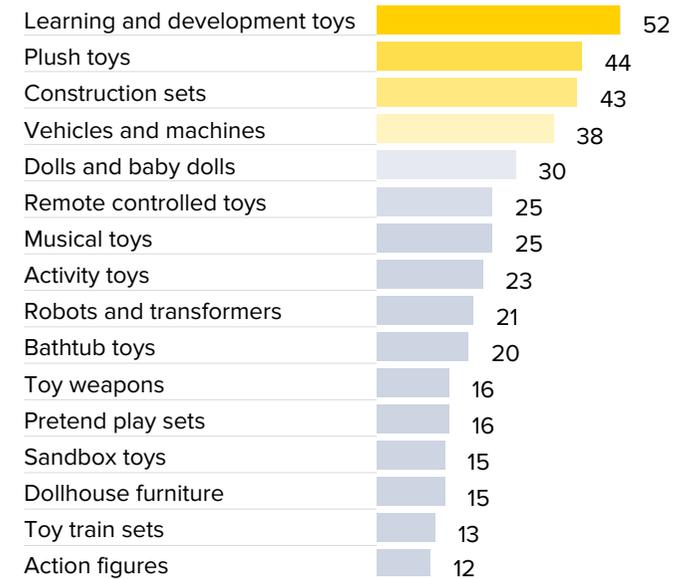
**MARKET SIZE OF COUNTERFEIT TOYS IN RUSSIA, billions of rubles**



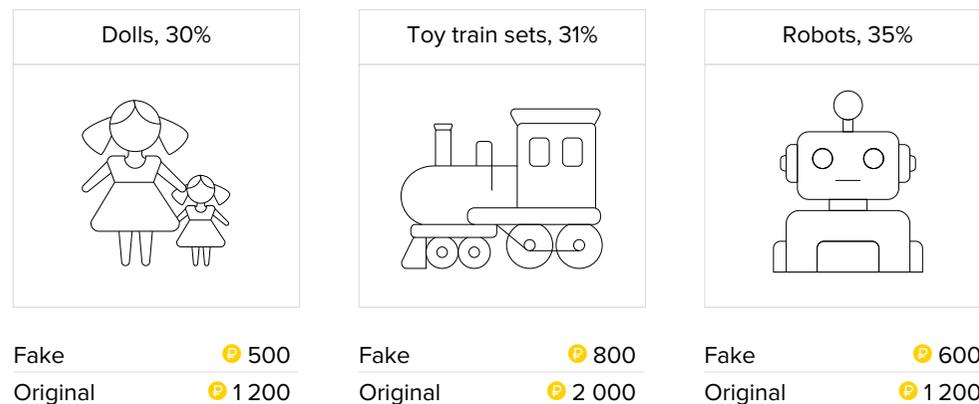
**COUNTERFEITS BY SALES CHANNELS, % of total sales volume**



**WHAT TOYS ARE MOST FREQUENTLY PURCHASED BY RUSSIANS, % of all respondents**



**TOP 3 TOY CATEGORIES BY SHARE OF COUNTERFEITS, % of total sales in the category**



**DISTRIBUTION OF PURCHASED TOYS BY PRICE RANGES, % of total toys**



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