

Toys and Games in the United Kingdom

June 2025

Table of Contents

Toys and Games in the United Kingdom

EXECUTIVE SUMMARY

Growth driven by kidult trend, sustainability and influence of strategic alliances

KEY DATA INSIGHTS

Chart 1 - Key Trends 2024

INDUSTRY PERFORMANCE

Traditional toys and games records most rapid value growth Lego expands Botanicals range, targeting kidults with complex construction sets Chart 2 - Lego Expands Botanicals Collection Disney and Epic Games partnership extends media influence in Fortnite Chart 3 - Disney Collaborates with Epic Games to Create Fortnite Universe

WHAT'S NEXT?

Video games to spearhead growth in toys and games Kidults and tech integration to influence development of traditional toys and games Sustainability to be a major trend in local market moving forwards Chart 4 - Analyst Insight Dominance of retail e-commerce to support greater uptake of subscription services

COMPETITIVE LANDSCAPE

LEGO Group gains share as Mattel and Hasbro focus on collectibles Independent games struggle to compete with AAA titles due to limited funding New range of LOL Surprise! dolls fails to appeal to younger children Mattel's ongoing commitment to supporting diversity and inclusion

CHANNELS

Retail e-commerce continues to dominate, while traditional toy shops decline Currys partners with Microsoft for Xbox repairs Liledu enters subscription services with play-and-swap model Chart 5 - Liledu Launches in the UK

ECONOMIC CONTEXT

Chart 6 - Real GDP Growth and Inflation 2019-2029 Chart 7 - PEST Analysis in the United Kingdom 2024

CONSUMER CONTEXT

Chart 8 - Key Insights on Consumers in the United Kingdom 2024 Chart 9 - Consumer Landscape in the United Kingdom 2024

COUNTRY REPORTS DISCLAIMER

Traditional Toys and Games in the United Kingdom

KEY DATA INSIGHTS

2024 DEVELOPMENTS

Expanding kidult audience helps drive sales of nostalgic collectibles Chart 10 - Key Trends 2024

INDUSTRY PERFORMANCE

Positive growth overall, with plush a particularly dynamic performer Lego targets kidults with expanded Botanicals Collection and boosts collectibles Chart 11 - Analyst Insight Funko's Bitty Pop! range drives collectibles sales with focus on nostalgia Chart 12 - Funko Expands Bitty Pop! Range

WHAT'S NEXT?

Construction and plush to remain strong performers, while scientific/educational is set to record most dynamic growth Sustainability set to transform development of traditional toys and games Retail e-commerce to make further gains, placing pressure on retail offline

COMPETITIVE LANDSCAPE

Lego gains share as Mattel and Hasbro pivot to collectibles Spin Master's latest acquisition enables it to expand presence in category Addition of Blind Barbie to Barbie Fashionistas range aligns with inclusivity trend

CHANNELS

Retail e-commerce gains share as toys and games stores loses ground Investment in Hobbycraft set to help drive sales of arts and crafts Liledu uses subscription model to enter traditional toys and games Chart 13 - Liledu Launches in the UK

COUNTRY REPORTS DISCLAIMER

Video Games in the United Kingdom

KEY DATA INSIGHTS

2024 DEVELOPMENTS

Video games software drives sales, while subscription models are increasingly favoured Chart 14 - Key Trends 2024

INDUSTRY PERFORMANCE

Sales of video games decline as consumers await new releases Activision Blizzard's Game Pass launch threatens PlayStation Plus subscriptions Chart 15 - Call of Duty: Black Ops 6 Launches on Xbox Game Pass Disney and Epic Games partnership engages consumers through Fortnite Chart 16 - Disney Partners with Epic Games Xbox Game Pass changes consumption and threatens console sales

WHAT'S NEXT?

Video games to experience faster expansion than the regional average Subscription services gain popularity, impacting traditional video game purchases Chart 17 - Analyst Insight New consoles face challenges amid subscription growth and headset potential

COMPETITIVE LANDSCAPE

Increasing consolidation, while Xbox pivots Consolidated landscape of static consoles dominated by Sony Corp

CHANNELS

Retail e-commerce remains dominant distribution channel for video games Currys partners with Microsoft to provide in-store Xbox repairs

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/toys-and-games-in-the-united-kingdom/report.