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Connected Toys Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Interface (App-based connected drones, Console connected toys, Smartphone connected toys, and Tablet connected toys), By Distribution Channel (Retailers, Online, and Specialty stores), By Region, & Competition, 2019-2029F

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Abstracts

The global connected toys market was valued at USD 10.35 Billion in 2023 and is expected to reach USD 35.49 Billion by 2029 with a CAGR of 22.8% during the forecast period. Significant growth in this market has been fueled by advancements in technology, rising consumer interest in interactive and educational play experiences, and the widespread adoption of Internet of Things (IoT) devices. Connected toys are traditional toys integrated with advanced digital features such as sensors, cameras, and wireless connectivity, allowing interaction with apps, other devices, and the internet. The market's growth is propelled by the increasing trend of blending physical and digital play, which offers richer experiences, as well as the benefits associated with enhanced learning and engagement for children. Connected toys deliver tailored and interactive content, along with real-time feedback and data collection, making them appealing to both parents and educators. The market includes a diverse range of products, from interactive dolls and action figures to educational tablets and augmented reality playsets. Industry leaders are continually innovating to create enticing and safe connected toys, addressing data privacy and security issues as they arise.

Key Market Drivers

Technological Advancements and Innovation

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The Global Connected Toys Market is being propelled by the rapid advancements in technologies such as IoT, Artificial Intelligence (AI), and augmented reality (AR). These technologies are revolutionizing how children interact with toys, offering more personalized, interactive, and immersive experiences. The integration of sensors, connectivity, and AI into toys has transformed them from simple playthings into sophisticated tools that can adapt to a child's learning pace, respond to their actions, and even evolve over time. As IoT devices become more prevalent in households, the connectivity infrastructure necessary for these toys is expanding, further fueling their demand. Parents and tech-savvy consumers are increasingly drawn to these innovative products, recognizing their potential to enhance both entertainment and education. Additionally, the seamless interaction between connected toys and other smart devices in the home enriches the user experience, creating a cohesive and interactive environment. These technological advancements also drive competition and innovation among manufacturers, leading to the development of more advanced features and capabilities in connected toys. As technology continues to advance, the market is expected to see even more sophisticated toys that offer deeper levels of engagement, further cementing their appeal in modern households.

Growing Preference for STEM Toys

The connected toys market is experiencing significant growth, largely driven by the rising adoption of STEM (Science, Technology, Engineering, and Mathematics) toys designed to develop children's skills in these critical areas. STEM toys play a crucial role in teaching professional skills like coding, engineering, and problem-solving from a young age, fostering a generation equipped to meet the demands of the modern workforce. In the United States, the emphasis on STEM education is particularly strong, as it's viewed as an economic imperative to enhance national proficiency in these subjects. Early engagement in STEM subjects helps build a solid foundation, which is essential for future academic and professional success. The National Center for Education Statistics reports that a substantial number of fourth graders in the U.S. are below proficiency levels in mathematics, highlighting the need for effective educational tools. Recognizing this demand, toy companies are increasingly investing in products that offer interactive and engaging learning experiences. These toys not only make learning fun but also align with educational standards, making them a preferred choice for parents and educators. By focusing on STEM, connected toys are helping to address educational gaps and prepare children for future challenges in a technology-driven world.

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Key Market Challenges

Privacy and Data Security Concerns

The Global Connected Toys Market faces significant challenges in ensuring data privacy and security, a concern that is particularly pronounced given the vulnerable demographic these toys target—children. Connected toys, often integrated with microphones, cameras, and data-processing applications, gather and transmit a wealth of personal information, including voice recordings, location data, and behavioral patterns. This data, if inadequately protected, can be exploited by malicious entities, leading to severe consequences such as identity theft or unauthorized access to a child's private life. As awareness of these risks grows, so does the scrutiny from regulatory bodies enforcing data protection laws like GDPR in Europe or COPPA in the United States. Manufacturers are under increasing pressure to incorporate robust security measures, such as end-to-end encryption, secure authentication protocols, and regular software updates. However, these enhancements can be costly and technologically complex, posing a barrier to smaller companies and slowing innovation in the sector. Moreover, heightened concerns among parents and guardians, fueled by high-profile data breaches, have led to hesitancy in adopting connected toys. The perceived risk of compromising their children's privacy outweighs the benefits these toys offer, ultimately impacting market growth. Therefore, ensuring stringent data privacy and security is crucial for the sustained success of the connected toys market.

High Costs and Accessibility Issues

The integration of advanced technologies, such as AI, sensors, and connectivity features, into connected toys significantly increases manufacturing costs. This, in turn, drives up retail prices, making these toys less affordable for many families. The elevated cost creates a financial barrier that can prevent low- and middle-income households from accessing these innovative educational and interactive play experiences. Consequently, this contributes to a growing digital divide, where only wealthier families can afford to provide their children with the latest in connected toy technology. The adoption of connected toys is further hampered by disparities in internet infrastructure and digital literacy across different regions. In underserved areas, inadequate internet access and limited digital skills among parents and children reduce the effectiveness and appeal of connected toys, making them less viable as educational tools. This not only restricts market growth but also perpetuates inequalities in children's access to modern learning and play opportunities. For the connected toy market to achieve inclusive growth, it is essential to address these challenges by exploring cost-

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reduction strategies, improving internet accessibility, and enhancing digital literacy initiatives. By doing so, the industry can broaden its consumer base and ensure that all children, regardless of their socio-economic background, can benefit from these technological advancements.

Key Market Trends

Rise of Smartphone-Connected Toys

The global proliferation of smartphones has revolutionized how people interact with technology, including toys. As smartphones become increasingly ubiquitous, a vast and growing population now has access to devices capable of connecting with a new generation of interactive, smartphone-connected toys. These smart toys span a wide array of forms, from educational robots to interactive dolls and augmented reality games, yet they all share the core feature of connectivity. Through apps or wireless technologies like Wi-Fi and Bluetooth, these toys can be easily controlled, programmed, or personalized via a smartphone or tablet. This interactivity enhances the play experience, offering more dynamic, personalized, and immersive engagement than traditional toys. For instance, children can now customize their toys' behavior, participate in augmented reality experiences, or even communicate with their toys in real-time. The ongoing advancements in technology further accelerate the evolution of these smart toys. Innovations such as artificial intelligence, machine learning, and improved wireless connectivity are increasingly being integrated into toys, making them smarter and more responsive. As these technologies advance, toys are expected to become more sophisticated, offering richer and more educational experiences that can grow and adapt alongside the child. This trend reflects a broader shift towards more interactive and connected experiences in children's play, driven by the widespread adoption of smartphones and the continuous evolution of technology. As a result, the smart toy market is poised for significant growth, catering to an increasingly tech-savvy generation.

Educational and Skill Development Focus

Connected toys have evolved from simple playthings into sophisticated tools that offer both entertainment and educational value. These toys, designed with a strong emphasis on learning, are increasingly being integrated into children's education, particularly in areas like STEM (Science, Technology, Engineering, and Mathematics), language acquisition, problem-solving, and creativity. Unlike traditional toys, connected toys often incorporate advanced technologies such as artificial intelligence, augmented reality, and

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machine learning, which enable them to adapt to a child's individual learning pace and needs. One of the key features of these toys is their ability to gamify learning experiences. Through interactive challenges and rewards, they engage children in a manner that feels like play but is structured to promote learning outcomes. For instance, a connected toy might present a child with a series of puzzles that gradually increase in difficulty, thereby fostering critical thinking and problem-solving skills. Similarly, language-learning toys can adjust their content based on the child's progress, ensuring that learning remains challenging yet achievable. The rise of these educational connected toys is a response to the growing demand from parents and educators who seek more than just passive entertainment for children. They want toys that contribute to cognitive development and skill enhancement, aligning with the broader movement towards educational technology and 'edutainment.' This trend underscores the belief that playtime can be both fun and instructive, making learning an integral part of a child's everyday life. As a result, connected toys are becoming an essential tool in modern education, bridging the gap between play and learning in a seamless and engaging way.

Segmental Insights

Interface Insights

The app-based connected drones segment is emerging as a dominant force within the Global Connected Toys Market, driven by its interactive and engaging features that appeal to both children and hobbyists. These drones, which can be controlled and customized via dedicated smartphone applications, offer a user-friendly and immersive experience that sets them apart from other connected toys. One of the primary reasons for the popularity of app-based connected drones is their ability to offer a more interactive and engaging user experience. The use of applications allows users to easily control the drones, perform complex maneuvers, and even participate in competitive activities such as drone racing. The app-based interface often includes features like real-time video streaming, augmented reality (AR) integration, and customizable flight paths, which add layers of excitement and personalization. This level of interactivity not only enhances the user experience but also keeps users, especially children, engaged for longer periods.

The technological sophistication of these drones appeals to hobbyists and tech enthusiasts who are looking for more than just a simple toy. The ability to program flight patterns, adjust camera angles, and capture high-quality aerial footage through an app adds a level of complexity that attracts an older demographic as well. The versatility of

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app-based drones, which can be used for recreational activities, photography, and even educational purposes, further broadens their appeal. The convenience of app-based control is another key factor contributing to the dominance of this segment. Most users are already familiar with smartphone interfaces, making it easier for them to adopt and master the drone's functionalities. The integration of these drones with mobile devices also allows for easy sharing of images and videos on social media platforms, which is a significant draw for today's digitally connected generation. The app-based connected drones segment is set to dominate the Global Connected Toys Market due to its ability to provide a highly interactive, engaging, and convenient user experience. The blend of advanced technology with user-friendly applications has made these drones a preferred choice among a diverse range of consumers, from young children to seasoned hobbyists.

Regional Insights

North America is poised to dominate the Global Connected Toys Market, driven by several key factors that contribute to its significant market share. A pivotal element in this leadership is the region's rapid adoption of cutting-edge technologies. North America, particularly the U.S. and Canada, is renowned for its swift integration of advanced tech solutions into everyday life, which has been especially prominent in the realm of educational and recreational gadgets. This tech-savvy environment facilitates the development and uptake of connected toys, which blend play with learning through the use of technology, thereby appealing to a broad demographic.

The high penetration of connectivity services in North America further bolsters the growth of the connected toys market. With widespread access to high-speed internet and robust digital infrastructure, children and parents alike can seamlessly interact with these technologically advanced toys. This infrastructure supports the functionality of connected toys, which often rely on the internet or Bluetooth to offer interactive experiences, such as games, educational content, or social interactions. Consequently, the region's strong connectivity underpins the operational efficacy of connected toys, making them more attractive to consumers. Product awareness is another crucial factor driving market growth in North America. The U.S. and Canada boast high levels of consumer awareness, largely fueled by the proliferation of e-commerce platforms and digital media. Parents are increasingly informed about the benefits of connected toys through online reviews, advertisements, and social media, leading to greater adoption rates, particularly among toddlers and preschoolers. E-commerce also plays a vital role in the distribution of these toys, making them easily accessible to a wide audience. The presence of major industry players like Mattel Inc., Hasbro, Inc., and Sphero in North

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America further strengthens the market's growth. These companies are at the forefront of innovation in the connected toys segment, continually introducing new products that resonate with the region's tech-savvy consumers. Their strong market presence ensures a steady stream of advanced and appealing products, keeping North America at the leading edge of the global connected toys market.

Key Market Players

Sphero, Inc.

Mattel, Inc.

Hasbro India LLP

Wonder Workshop Inc.

WowWee Group Limited

LEGO System A/S

VTech Holdings Limited

Nintendo Co., Ltd.

Jabil Inc.

LeapFrog Enterprises, Inc.

Report Scope:

In this report, the global connected toys market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Connected Toys Market, By Interface:

App-based connected drones

Console connected toys

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Smartphone connected toys

Tablet connected toys

Connected Toys Market, By Distribution Channel:

Retailers

Online

Specialty stores

Connected Toys Market, By Region:

North America

United States

Canada

Mexico

Europe

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

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Japan

India

Vietnam

South Korea

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Kuwait

Egypt

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the global connected toys market.

Available Customizations:

Global connected toys market report with the given market data, TechSci Research

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offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

· Detailed analysis and profiling of additional market players (up to five).

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