



Prepared for Royal Mail

The UK Subscription Box Market 2021

Analysis, consumer attitudes and trends in
the UK subscription box market

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Summary & conclusions

Summary

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THE MARKET

£1.8 billion

Forecast value of the subscription box market in 2025, up 34.7% vs. 2020

Consumers' growing appetite for subscription services has been evident over recent years amid rising investment in digital subscriptions, such as Netflix and Spotify. This trend has extended to the retail market, with spending on retail subscription boxes increasing 134.7% between 2017 and 2020. Growth has been driven predominantly by the recipe box category, with demand for these items spiking over 2020, amid restrictions on physical retail and foodservice.

While dominated by a few large food subscription brands, the market remains highly fragmented. Since 2017 several companies have halted operations but have subsequently been replaced with a plethora of newcomers, indicative of the fast pace of this market. GlobalData forecasts that the next five years will see a slight easing of growth as the market matures and the leading players solidify their position.



CONSUMER

29.6%

Proportion of shoppers currently signed up to a subscription box service

The proportion of consumers that are signed up to a subscription service reached 29.6% in 2020, up from 27.4% in 2018. At the same time, the proportion of consumers signed up to four or more schemes has risen by 19.0ppts to 55.6% over the same period. This increase in the average number of subscription boxes consumers are signed up to is reflective of strong innovation in the market, and the rise of the subscription box as a gifting option.

The appeal of subscription boxes continues to be highest among younger shoppers, with 65.9% of 18-24 shoppers stating that they are signed up to at least one subscription box. Improving appeal to older shoppers will be integral to growth over the coming years. To this end, the category will benefit from the growth in online retail adoption among older shoppers over 2020.



RETAILERS

23.6%

of subscription box users plan to cancel their subscription box soon

Retailers face good prospects as we progress through 2021, with fewer than a quarter of shoppers stating an intention to cancel their subscription box subscription(s) soon. However, with this rising to 34.5% among 55-64 shoppers, retailers should look to offer incentives to retain customer loyalty. Furthermore, with 53.5% of consumers stating that they would prefer to purchase boxes on a one-off basis, adding greater flexibility to these services could increase appeal. For example, operators are increasingly looking to offer subscription box holidays; for example, where the recipient either doesn't need any more of that item or if they are going to be away.

With many still perceiving products like food/recipe boxes as too expensive (73.7%), retailers must highlight where consumers are receiving value-for-money or risk consumers cancelling in the future.

Key figures

Summary & conclusions



THE 2020 MARKET IN FIGURES

£1,369.0 million
Estimated spend on subscription services in 2020



87.8 million
Deliveries made



£353.7 million
Spent on gifting subscription services



1,098.2 million
Spent on food & drink subscriptions and recipe boxes (the largest gifting category)

MARKET GROWTH

34.7 %
Forecast growth in the subscription market (2020-2025)



THE FORECAST 2025 MARKET IN FIGURES

£1,843.9 million
Forecast value of the subscription market in 2025



104.0 million
Deliveries made



41.2 %
Growth in spending on male grooming subscriptions over 2020-25



40.0 %
Growth in spending on food & drink subscriptions over 2020-25

Summary & conclusions

Best practice

Personalisation & choice



When it comes to subscription boxes, personalisation is a key factor driving consumers' decision to sign up, with tailored initiatives being a defining element of a high-quality consumer experience. Subscription services need to leverage personal data and preferences to attune products and services to each consumer, ensuring high customer retention rates

SKIN Complete!	HAIR Complete!	PERSONAL STYLE Complete!	MORE ABOUT YOU Complete!
How would you describe your complexion?			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Normal	Dry	Oily	Combination

Personalisation, convenience and social media – key to a successful subscription box service

The subscription model has become increasingly popular due to the benefits provided, including convenience, flexibility and personalisation. Personalisation is a key element among many subscription services and operators are becoming increasingly adept as moulding product contents to fit consumer preferences, while also allowing for shoppers to more conveniently define these preferences.

Birchbox's beauty subscription service makes it easy for consumers to trial and find novel products to incorporate into their beauty and personal care regime. The online beauty operator first asks consumers to fill out a beauty profile, collecting information about complexion, skin concerns, skin tone, product interests, hair type and personal style. Birchbox utilises this information to select brands and products best tailored to the customer's needs. Moreover, to enhance individualised service, each month subscription users select a product shade for one of the items delivered in their subscription box, e.g. a lip balm or eye shadow shade, ensuring there remains an element of control from the customer on what they receive.

Personalise your May Birchbox

Choose your favourite eyeshadow!

[Terms and Conditions.](#)

Motivated Mauve
Use code: MAUVE

Confident Copper
Use code: COPPER

Proud Pink
Use code: PINK

2020

JULY JUNE MAY APRIL

MARCH FEBRUARY

Best practice

Reactive fulfilment practices



An enticing factor of many subscription boxes is that they exist to make life easier and offer convenient fulfilment methods to cater to consumers' increasingly busy lifestyles. Hence, for subscription services to satisfy consumers' desire for convenience, user-orientated delivery are essential



Reactive delivery methods are essential to success

Delivery is an important element to any subscription box service, particularly for operators that dispatch food & grocery-related items. To guarantee the freshness of F&G products and ensure that items are safe for consumption upon delivery, investment in subscription box packaging is crucial.

To cater to consumers' desire for convenience in F&G delivery, HelloFresh – the meal kit subscription service – has a leave safe policy where delivery drivers can leave boxes in a selected safe place for consumers to collect once they arrive home. HelloFresh uses specially insulated liners and cooling technology to retain the freshness of its produce for up to 48 hours after delivery. The food recipe subscription service has a dedicated team, testing new materials and products for packaging and even monitors local weather patterns to adjust the packaging to ensure optimal freshness.

Best practice

Social media use



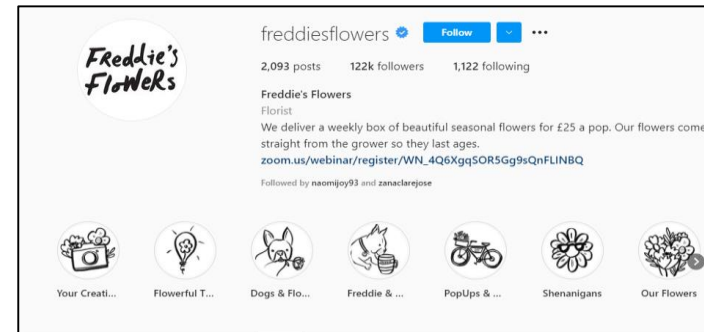
Social media has become an essential tool for subscription services to create a brand voice, raise awareness about products, and provide an easy and quick way to engage with consumers globally. Investment in social media activity is crucial to retain customers and reach new demographics.



Social media is a must-have tool for all subscription providers

Social media is at the core of many subscription brands' marketing strategies and has many uses for subscription businesses. Instagram, in particular, can be an effective and cost-effective way to engage with consumers via creating interesting content, gaining product/service feedback, and can even be used to explore product development ideas through Instagram polls and comment sections of photos.

Freddie's Flowers utilises its Instagram platform to engage with consumers through creating content and sharing pop-up locations for consumers to visit. On its Instagram page, the florist shares tips and tricks for how to keep flowers as fresh for as long as possible, gives shoutouts to service users by displaying flower arrangements, and creates how-to posts for consumers to get the most out of their flowers – e.g. how to make flower confetti. By creating likeable and fun content, social media users will gravitate more towards the brand and share posts among those potentially not yet purchasing from the brand, elevating its online presence and reaching a wider audience organically.



Hazel & Blue

The launch of subscription boxes

Founded by Becky Avery, Hazel & Blue is a business that creates eco-friendly, sustainable and nature-inspired apothecary products. The company is a relative newcomer to the subscription model; it introduced a subscription service in 2019 and has been able to capitalise on the rising popularity of subscription retail during this time. The launch of subscription boxes was driven by the appealing nature of securing a consistent revenue stream, but also as a method of placing more Hazel & Blue products in front of its customers. Subscription boxes allow Hazel & Blue to advertise its wider product range, which is important given the wide array of items it currently sells.

Hazel & Blue's found its subscription model offered several advantages

While embracing a subscription model can be wrought with logistical issues, Hazel & Blue has been able to seamlessly embrace it due to its products being developed and made in-house. Being able to design, create, and integrate anything into its model has ensured it is reactive to new trends. The business utilises themed subscription boxes, driven by the seasons, which ensures Hazel & Blue can plan, produce, and procure all the items needed for the boxes, well in advance. Another advantage of the subscription box model is that it allows Hazel & Blue to use existing ranges that have not sold through, allowing for less waste and more sustainable use of resources. A minor challenge when adopting the subscription model was identifying the right supplementary or complimentary gift to support the candles and brand.

Moreover, subscription boxes allow for the retention of customers, as once customers try an item from the brand, this encourages them to come back and explore what else Hazel & Blue has to offer. Gifting is a big market for subscription boxes and Hazel & Blue has listed its subscription box on Notonthehighstreet, allowing it to take advantage of this trend and reach an even wider audience.



Hazel & Blue continued

Current outlook and future plans

2020 was a strong year for Hazel & Blue, amid the growth of online retail more generally, and its products providing attractive options for self-use and gifting alike. The company anticipates that the market will become tougher from Q2 2021 onwards, amid stronger sales comparatives, and as consumers are enticed to divert spending elsewhere, particularly towards leisure activities.

Upcoming plans revolve around four key themes: expansion, partnerships, community, and flexibility. Hazel & Blue is looking at international expansion in the next 2-5 years, which it sees as offering a strong additional revenue source. Exploring partnerships, and pivoting its subscription boxes to appeal to a wider array of potential customers is another focus, with trade shows one route it is taking for driving activity here. Opportunities such as the creation of themed boxes, and partnering with complementary brands, such as ceramists or dried flower companies, are among the strategies that Hazel & Blue is exploring.

Creating the presence of a community is another essential component for future growth; Hazel & Blue wants to foster a subscription box community where customers can gather and share what they do, ultimately helping retain loyalty. Elsewhere, the business believes that flexibility is becoming increasingly important, so instead of just providing traditional subscriptions plans, Hazel & Blue is looking to trial flexible subscription box plans.

Harnessing partnerships with delivery providers

Communications is key when it comes to managing fulfilment partnerships, and this is something that Hazel & Blue has found successful in the past, with it able to communicate any delays on delivery and ultimately manage consumer expectations. As the business continues to grow, this is something that must continue to develop and strengthen, and the company would benefit from establishing a closer relationship with delivery providers – e.g. having a single point of contact to support the business.

With plans to expand internationally, this is another area in which the business will look to its fulfilment partners to support. This is both from a perspective of providing insight into entering new markets, and strong communication in ensuring the process runs as smoothly as possible.



Bloom & Wild

Bloom & Wild report exceptional growth in self-gifting

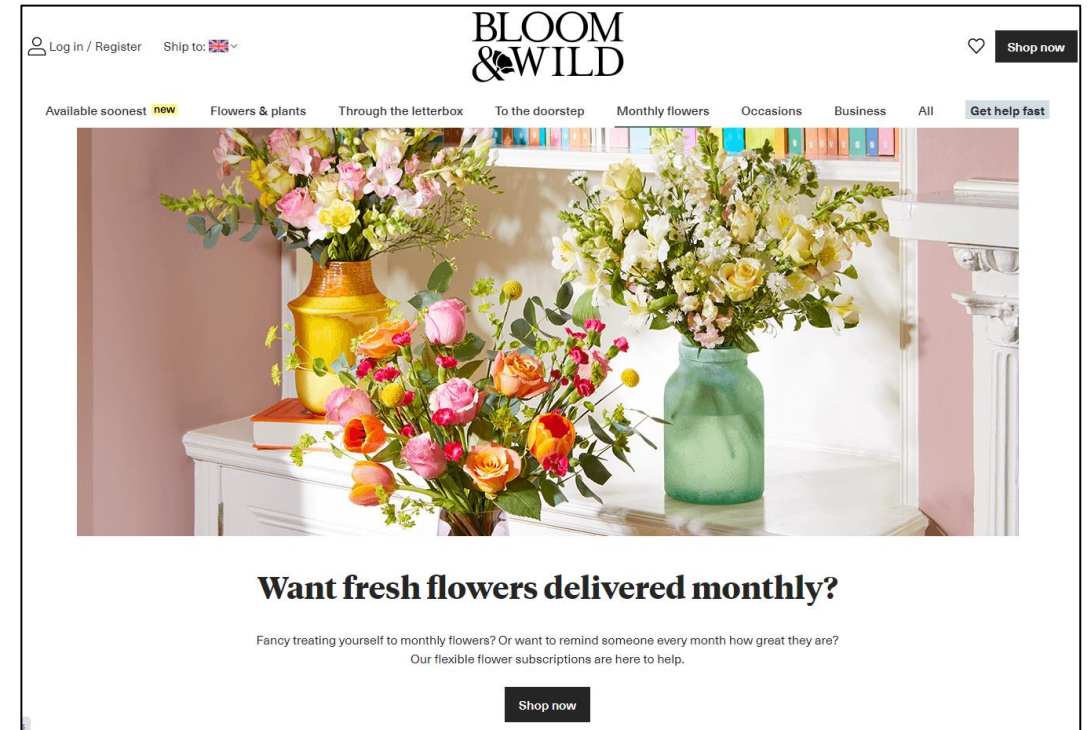
Founded by Aron Gelbard and Ben Stanway in 2013, Bloom & Wild offers a wide range of letterbox flowers, as well as hand-tied bouquets and potted plants. Alongside one-off flower deliveries, the company offers a highly customisable subscription service. In addition, it sells bundles, offering consumers the ability to make a one-off payment for a set number of deliveries over a defined period, such as three, six or 12 months. Its subscription model is a fully customisable service, allowing customers to choose the frequency of delivery. Bloom & Wild saw exceptional growth of 170% in self-gifting purchases in the 12 months following the start of the pandemic, with UK consumers increasingly looking to invest in small treats and focusing on improving their home environments.

Rebranding its subscription model

As part of meeting consumer demand for a highly personalised subscription service, Bloom & Wild's proposition is focused on providing consistently high quality, reasonable pricing and a seamless digital experience. The brand offers the ability for consumers to pay upfront or as they go, as well as allowing customers to pause, cancel and change delivery details at any time. Shoppers can also choose the exact bouquet or flower arrangement they want to receive each month. Bloom & Wild aims to further strengthen customer loyalty through initiatives such as rewarding its most engaged, loyal subscription customers with benefits such as early releases of new flower arrangements.

Bloom & Wild finds that a key advantage of operating a subscription model is the predictability of orders and the forecasting of the number of stems and bouquets required, which is essential when working with perishable items. Running a subscription model is also cost-effective for Bloom & Wild due to a lack of repeat marketing needed to retain customers. Consequently, Bloom & Wild can divert these savings into offering customers bouquets at a lower price point or a different design.

While Bloom & Wild doesn't see any challenges with operating its subscription service, there is an ongoing challenge in raising awareness of its subscription offering, with a proportion of shoppers only using it for one-off single purchases.



Bloom & Wild continued

Bloom & Wild's future plans: sustainable expansion

Bloom & Wild has experienced significant growth in both revenue and the popularity of its subscription services since the start of the pandemic and, as a consequence, the brand has clear plans to expand in Europe. The acquisition of a competitor, bloomon, in the Netherlands, will deliver immediate scale across Europe.

A key focus for Bloom & Wild has been adopting innovations that have helped it deliver sustainable solutions. The brand aims to achieve 100% recyclable packaging, reducing single-use plastic and polyester by over 60,000kg in 2021. It has also announced that it is now offsetting all of its carbon emissions and has committed to reducing emissions further and maintaining zero waste to landfill. In 2020, Bloom & Wild launched a new creative platform, Care Wildly, along with its Thoughtful Marketing Movement to promote industry change. Elsewhere, Bloom & Wild has seen an increase in its charity donations, offered discounts to frontline workers during the COVID-19 pandemic and is raising awareness for unpaid carers in the UK, through an annual partnership with Carers Trust.

Successful partnerships with channels and delivery companies

Over the past 12 months, Bloom & Wild has entered into a retail partnership with Sainsbury's. Initially trialling in 25 stores, stocking unique arrangements not available online, it now has its product in 93 Sainsbury's stores nationwide. Bloom & Wild can broaden and enhance its range of products and services to better serve customers' needs, reaching an audience that may not typically shop online.

Unlike other subscription services, Bloom & Wild requires certain methods for customer deliveries due to the lifespan and delicate nature of flowers. Consequently, deliveries are required to be left on the doorstep or with a neighbour, and delivery back to a Post Office depot is always a last resort. It is, therefore, important that delivery partners communicate with customers throughout delivery to manage consumer expectations. Another important delivery consideration for Bloom & Wild is the ability to capture data about the delivery on-time performance or postcode issues to improve last-mile customer experience. As consumers expect more flexibility in delivery, Bloom & Wild is working closely with its delivery providers to extend cut-off times for delivery and a Sunday delivery service.



Case study

The Beautiful Book Company



The Beautiful Book Company

The beginnings of The Beautiful Book Company and the driver of sales

The Beautiful Book Company was founded in 2014; its establishment driven by a life-long love for books, paired with the frustration at a dearth in literary gifts and book subscription boxes in the UK. In an attempt to address the gap in the market, and cater to book lovers, The Beautiful Book Company emerged, offering consumers subscription schemes and book hampers to satisfy the demand for book gifts.

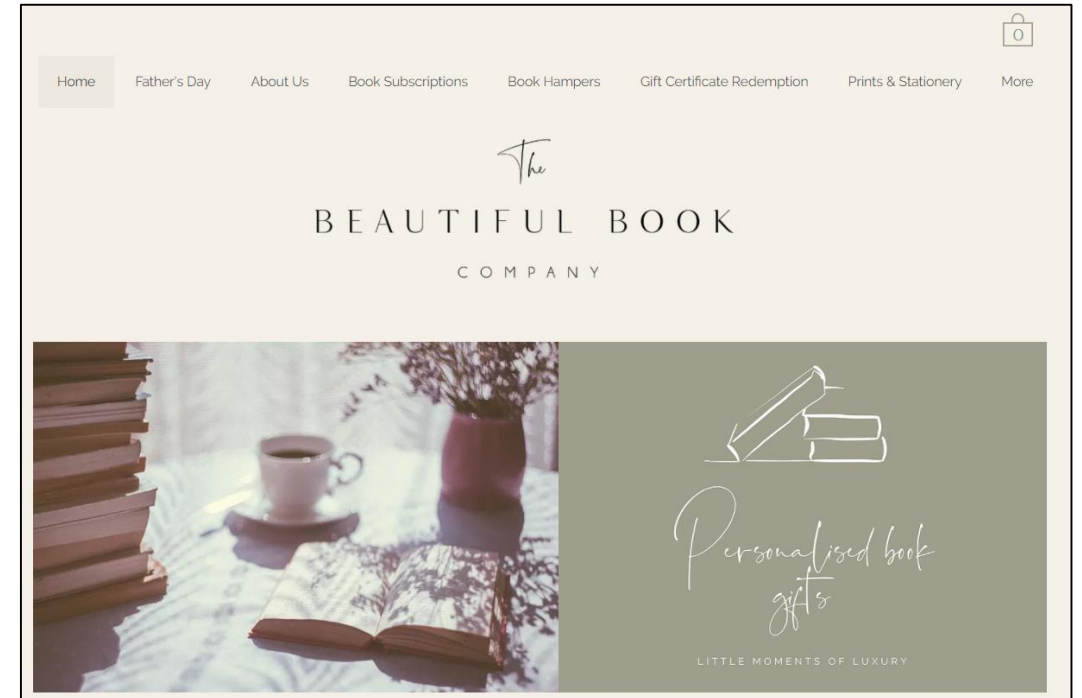
While some customers purchase for self-use, shoppers typically utilise The Beautiful Book Company more for gifting purposes, where the value add is in the level of personalisation of the books the recipient receives. The COVID-19 pandemic has had a positive impact on demand for its subscription schemes, allowing it to grow exponentially year-on-year. Elsewhere, book hampers – a one-off purchase service that The Beautiful Book Company offers – have also seen strong performance, with the appeal of these items being high for key gifting occasions, such as Mother’s Day, or Father’s Day.

Challenges faced when launching a subscription business

One key challenge initially faced by The Beautiful Book Company centred around building publicity for the business and awareness of its subscription boxes. As a business answering the lack of book subscriptions in the UK, enticing people to buy into subscription boxes that they were not accustomed to, and developing a demand in an emerging segment, has been a key focus.

The COVID-19 pandemic also provided its own hurdles, as it caused a spike in demand, impacting the ability of The Beautiful Book Company to meet the unprecedented demand for its subscriptions and other products. Moreover, at the start of the pandemic, many key wholesalers closed – at least temporarily – and The Beautiful Book Company was unable to gain access to titles that they previously had, forcing it to find new ways to source books. There were also concerns surrounding stock and packaging levels.

The company had to juggle the demand of existing subscription users alongside the influx of new consumers, while meeting customer delivery expectations. It opted to remain open throughout the pandemic, something not all its competitors chose to do, supporting its customers during a time when its products represented a welcome treat for self-use and gifting alike.



Summary & conclusions

Case study

The Beautiful Book Company



The Beautiful Book Company continued

The subscription model and differentiation from competitors

The Beautiful Book Company offers a slightly different subscription model to most in this market, whereby shoppers typically pay upfront for the subscription plans.

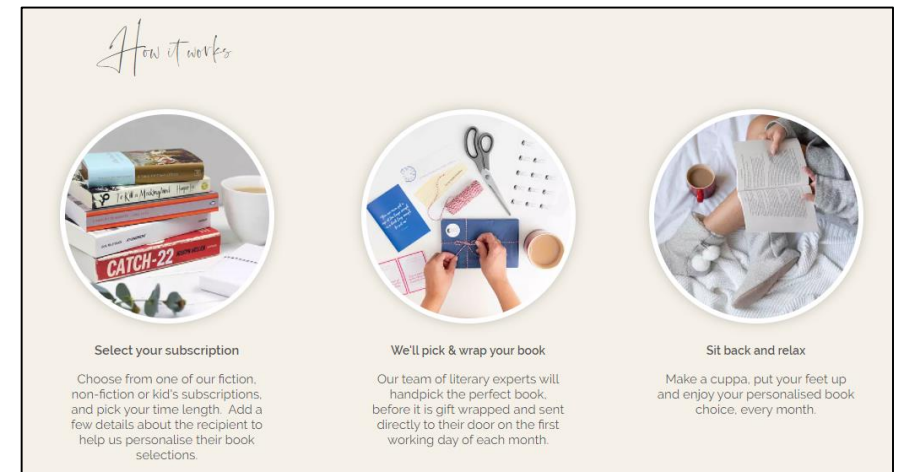
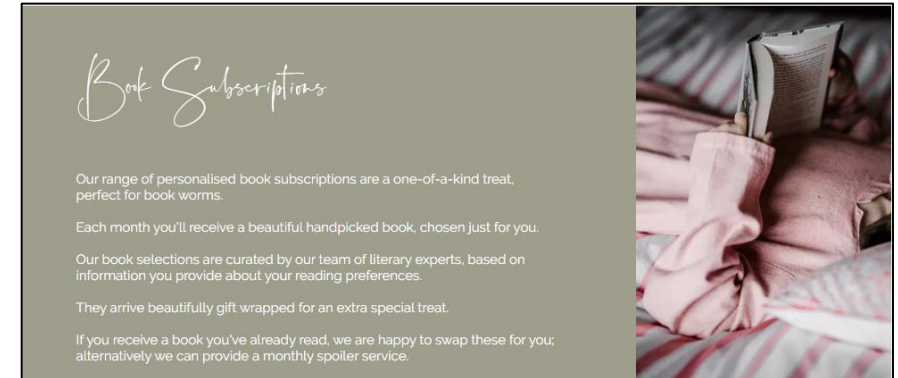
The way The Beautiful Book Company attempts to distinguish itself from competitors is through its product offering. While most book subscription schemes offer consumers the same book or a choice of between one to three set titles, The Beautiful Book Company allows customers to influence the books they receive or send out as gifts, meaning that each book sent is tailored to each recipient. It also asks for feedback to tailor future subscriptions.

There are no immediate plans to expand further into third-party service providers, due to growth being driven so organically since the start of the pandemic. However, the long-term aim is to drive traffic back to its website as opposed to third-party stockists, building the brand further. The Beautiful Book Company will also look to work on other channels or shops to cater to the differing demand for its product.

Courier use and the keys to success

The Beautiful Book Company believes that good delivery tracking is an essential service that delivery partners should be providing, due to rising customer expectations here - e.g. one-hour delivery slots and text notifications. Furthermore, with more businesses providing tracking updates for packages, it is pivotal for The Beautiful Book company to provide this service as well.

Working more closely with delivery partners is also key to a successful relationship, with support from a primary contact within the courier business able to solve any issues that arise quickly, as well as offer support as the business continues to grow. As such, communication is important when working with couriers, particularly among smaller businesses.





The market

1. COVID-19 PANDEMIC ALTERS HOW CONSUMERS SHOP FOR FOOD & DRINK

- Recipe box and food & drink subscriptions have been key outlets for UK consumer spending since the onset of the COVID-19, amid restrictions on physical retail and foodservice, and the initial difficulty faced by traditional online full-service grocery operators in scaling up delivery capacity. While the full-service operators were gradually able to better meet the spiking demand for online grocery shopping over the first few months of the pandemic, many UK shoppers were introduced to alternative online operators. In the case of the recipe box segment, 2020 represented an acceleration of development. This segment had already been growing strongly, with shoppers buying into propositions that helped in tailoring dietary choices, while limiting waste and appealing to consumers wishing to be more sustainable with their food choices. Indeed, GlobalData estimates that the recipe box market grew 347.1% between 2017 and 2020, to £578m.
- Elsewhere, in addition to independent food businesses, food & drink subscription services have seen growing appeal among foodservice operators, with many businesses opting to utilise this model to retain a level of revenue while regular operations were restricted during the pandemic. Moreover, the pandemic has had a lasting effect on the UK population and the work/life balance, and this will encourage many to retain their food & drink and recipe box subscriptions, even as life starts to return to normal. For example, while commuters may have previously picked up a takeaway or ready meal as a convenient dinner option during a busy week, there are signs that the work from home trend will at least partially continue for many over the coming years. This additional time at home will ensure people have the capacity to cook meals from scratch and make more of an event out of dining in.

2. SUBSCRIPTION BOXES REPRESENT CONVENIENT PURCHASING OF EVERYDAY ESSENTIALS

- As with food, the more general growth in purchasing essential items online has bolstered the subscription box market in the UK. This has been particularly evident in categories such as male grooming, where there is a consistent, predictable need to replace and replenish items, and subscriptions offer a hassle-free alternative to traditional purchasing behaviour. The male grooming subscription market grew 107.9% between 2017 and 2020 to reach a value of £41.7m. This success is evident in the progress made by specific brands in the segment; for example, Harry's – which started as a subscription service – now stocks in several leading retailers, such as Sainsbury's and Boots.
- Elsewhere, other everyday health & beauty products are also seeing strong growth. While openness surrounding the purchase of sanitary items has risen, the more discreet nature of purchasing these items to be delivered to home remains appealing and has resulted in a boom in demand for these types of products. These items are also being linked to self-care, tapping into the wellness trend with some subscription brands including items such as relaxing teas or pamper products. Sustainability initiatives surrounding health & beauty and personal care items are increasingly being highlighted within these services.



3. GIFTING APPEAL RISES IN 2020 AS MANY LOOK TO SEND THOUGHTFUL AND REGULAR PRESENTS TO LOVED ONES

- Between 2017 and 2020, spending on subscription boxes purchased as gifts for others increased 121.2%. This type of purchasing saw particular growth over 2020, driven by the greater difficulty in purchasing physical gifts, and the potential for subscription boxes to represent thoughtful gifts during a period when many friends and family were apart. The growth in subscription box gift purchasing has been driven by categories such as entertainment & books, health & beauty and other subscription services such as fashion & jewellery. Retailers such as The Beautiful Book Company witnessed a surge in demand during the height of the pandemic and those selling craft boxes also performed well as many sought out activities to do at home.

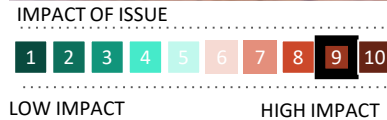
Key issues & trends in the subscription market

The market



SUBSCRIPTION POPULARITY BOOMS DURING COVID-19

The popularity of subscription boxes has soared during the pandemic, amid the more general acceleration in online retail growth.

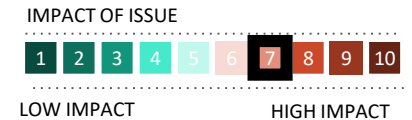


Amid tight lockdown restrictions, UK consumers increasingly sought out alternative avenues to treat themselves and others during the pandemic. For many, subscription box services helped to ease 'lockdown blues' as shoppers could look forward to a regular deliveries. Moreover, subscription services gave customers the opportunity to trial new products in categories such as health & beauty, as a time when physical browsing for non-essential categories was limited to retailers such as the grocers for large periods of the year. Elsewhere, demand from corporate firms for subscription services also rose as employers offered a 'thank you' to those who worked from home during the lockdown.

More generally, subscription services minimised the need to go to shops when consumers felt less comfortable doing so, a trend that is expected to continue post-COVID-19 as shoppers opt for convenience. Additionally, as supermarkets became overwhelmed with the demand for online delivery slots at the height of post-pandemic panic-buying, some consumers consequently turned to food box delivery subscriptions, seeking a more convenient and less stressful way to secure food supplies.

INSTAGRAM INFLUENCERS PROMOTE SUBSCRIPTION BOXES

Influencer marketing has been proven to be a more active method for promoting services because it allows retailers to tap into the community, and trust, the influencer has already established.



Instagram influencers are increasingly being leveraged to promote subscription services, with in-depth reviews on Instagram Lives, or posts featuring the product with a promotional code. Unboxing videos are also popular and allow users to gain a better understanding of the service on offer, while being short and appealing to younger demographics. Influencers are well-placed to create a narrative that feels like an organic experience shared by the influencer and user.

Food box delivery services, such as Hello Fresh regularly use Instagram influencers to promote products. This way, they can gain the attention of audiences that they might not be able to easily reach, while posts often tie personal choices or lifestyles into the collaboration. Subscription box providers can also offer Instagram influencers with a promo code for their followers, giving potential customers an incentive to sign up for the service, while allowing the operator to keep track of the effectiveness of specific collaborations.

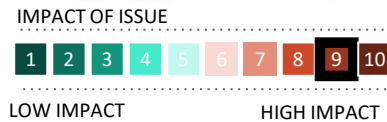
Key issues & trends in the subscription market

The market



TRADITIONAL RETAILERS AND BRANDS ARE REALISING THE POTENTIAL OF SUBSCRIPTION

As traditional retailers struggle with declining footfall and market share shifting toward online competitors, some are moving toward a subscription-based model.



Traditional retailers are increasingly recognising the potential of the subscription box segment as a viable revenue stream. For example, food brands are also forming partnerships with successful subscription services giving them access to models, brands and products they haven't yet engaged with.

Examples of developments in this area include Morrisons' introductions of an essentials food box on a subscription basis, to guarantee consumers weekly, fortnightly or monthly food boxes. Demand for online delivery slots during the pandemic was high and Morrisons recognised the need for a regular food delivery offering a discount for shoppers signing up for a subscription.

Elsewhere, Nestlé has agreed to a deal with Mindful Chef, expanding its D2C offerings in the UK. Nestlé's food strategy of great tasting, healthy food aligns well with that of Mindful Chef and this partnership also offers Mindful Chef additional support from Nestlé as it accelerates its growth plans in the UK.

MORE SUBSCRIPTION SERVICES ARE USING AI

Subscription box services are using AI to provide invaluable insight into consumer preferences. AI capabilities will further enhance personalisation in the segment.



Companies are further refining subscription models to offer greater levels of personalisation as well as improving efficiency of logistics to gain a competitive edge. One issue subscription box services face is the rate of 'churn'. If operators can more accurately predict what the customer will like, the probability of cancellation decreases. Gousto, a meal kit delivery service, uses AI to provide its customers with personalised recipe recommendations.

Moreover, forecasting allows for a more accurate planning of daily customer orders, which helps reduce food waste, while also offering shortened delivery times. Hello Fresh, which delivers weekly ingredients for home-cooked meals, utilises AI to tailor recipes. Customers can rate their meals with stars and leave comments, while customers returning or keeping products allows a feedback loop of 'do's and don'ts' to be created. The constant flow of data allows Hello Fresh to make real-time adjustments to recipes.

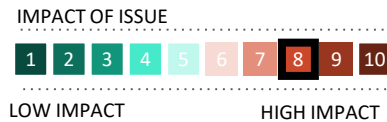
Key issues & trends in the subscription market

The market



EXPERIENTIAL & HOBBY RELATED SUBSCRIPTION SERVICES GROW IN POPULARITY

Experiential and hobby-based subscription boxes are on the rise and the popularity of such boxes exponentially increased during the COVID-19 pandemic, as consumers were on the prowl for activities to do to keep them occupied at home.

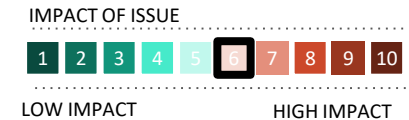


The benefit of experiential and hobby-based subscription boxes, such as cocktail making kits and crafting subscription projects, is that everything that consumers need to engage in these activities as supplied, making it convenient and easy for consumers to pick up new projects and gain novel experiences.

For example, Kocktail, the alcoholic beverage making kit subscription service, brings the cocktail making experience to consumers by delivering all the essential elements needed for consumers to make their chosen cocktail. The subscription provider elevates the cocktail making experience by providing subscription users with a story behind the making of each drink. Kocktail launched in September 2020 and generated over £120K in revenue in the first seven months of trading, with over £70K of its revenue derived from its subscriptions service. Nevertheless, as consumers begin to see lockdown restrictions lifted, this trend may prove more short-lived. Remaining engaged with existing customers will be essential and focus should be placed on hobbies and activities that can be done in groups or that are easy to put aside and pick back up when consumers have a spare moment.

RISE OF GIFTING SUBSCRIPTIONS

Most gifts are one-off purchases, but with the increasing variety of themed subscription boxes, shoppers can make a single gifting purchase that continues giving. Subscription brands have encouraged the gifting of subscription boxes trend further by spotlighting the surprise and delight element and have started advertising gift vouchers that can be redeemed for subscriptions.



The gifting market is another focus for subscription businesses to capitalise on, whether with shoppers gifting family and friends, workplaces gifting employees or people engaging in self-gifting. There has been an increasing plethora of businesses expanding into subscription services and a rise in the number of subscription businesses listing on gifting websites – such as Notontheheightreet – to exploit this trend. Subscription gifts now have a dedicated section on gifting specialists' websites to allow consumers to easily find such gifts.

The popularity of subscription boxes as gifts can be tied back to their element of surprise and periodic arrival: it is a nice and regular surprise for recipients. Moreover, there are myriad subscription boxes that cater to a wide variety of interests, making them an ideal gifting idea for many recipients and occasions, while also taking some of the gift idea creation away from the sender. For example, The Beautiful Book Company curates which books recipients receive based on initial information given by the sender, allowing the company to utilise its reading expertise to make informed decisions.

The market

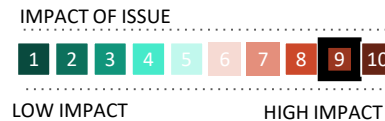
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RISE OF SUBSCRIPTION SERVICES OFFERING BASIC ESSENTIALS

Subscription boxes can not only serve consumers' desire for treats and gifts but have also expanded to satisfy consumers' need for essential items.



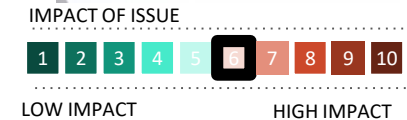
Businesses are recognising the potential for subscription boxes to serve consumers' daily and essential needs. There has been a rise in the number of subscriptions offering items such as food & grocery, personal care and grooming items (such as razors, blades and shaving accessories), hygiene-related items (such as deodorants) and household staples (such as laundry detergent).

The pandemic acted as a catalyst, spotlighting these subscription businesses as consumers attempted to limit trips outside of the home even for essential items, leading them to find alternative means of procuring these items. GlobalData anticipates that, due to changes in consumers' shopping behaviours, and the convenience that these subscription plans provide, the trend of relying on subscription services to attain mundane items will continue post-pandemic.

Smol, a company that launched in 2018, provides a subscription service that allows consumers to easily order household essentials such as laundry detergents, fabric detergents, dishwasher tablets and surface sprays. The subscription service saves consumers money over time, offers concentrated and effective cleaning supplies and uses lower levels of added chemicals. There is also an element of personalisation to the box, where consumers can select the type of laundry capsules preferred, for example.

NICHE PRODUCT MARKET

Products that are not easily available in shops offer an opportunity to service needs not currently met.



Social media has allowed for niche-interest communities to develop, that lend themselves to the subscription box model. This has been particularly the case among millennial consumers, who are a captive audience for subscription services, having been early adopters to the subscription concept through services such as Netflix and Amazon Prime. These consumers are more inclined to subscribe to several subscription services at a time, driven by experiential, convenience and money-saving considerations.

Every niche has an influencer that a subscription company can utilise for reviewing its product, allowing a subscription service to reach a large and captive audience.

Subscription boxes, such as Curlbox, cater for those with curly hair, while Rowan offers a subscription box aimed toward teens that are hypoallergenic. The latter also comes with mindfulness cards and stickers; mindfulness being a mainstream trend on social media that has emerged over the past few years.

The market

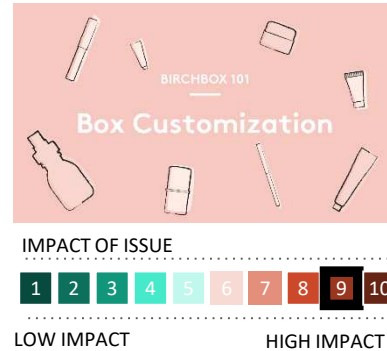
Key issues & trends in the subscription market

The market



GREATER CUSTOMISATION TO MEET CONSUMER EXPECTATIONS

Consumers are demanding greater choice and flexibility.



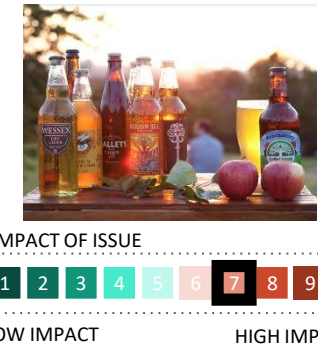
Consumers are demanding greater choice and flexibility in their consumption choice and, consequently, subscription services need to offer strong customisation in terms of pricing, content and commitment.

For example, at Birchbox, a customer can sign up for a selection of five sample-size cosmetic products tailored to a beauty profile. They can then add detail on the products they liked or didn't to further influence what Birchbox selects for their next delivery, building and improving upon the product they receive each month.

Offering even further flexibility, Beauty Pie offers a personalised service where consumers build up credits with the brand based on how much their membership fee is each month. These points don't have to be spent each month, giving subscribers the flexibility based on what they want to receive each month, while also resulting in less product wastage.

INDEPENDENT BUSINESSES OFFERING SUBSCRIPTION SERVICES

Subscription services are an effective way for small businesses to get their products to market.



Through the pandemic, small independent businesses have looked to respond to physical retail restrictions, with building a presence in the subscription market being a key focus for many. Furthermore, there has been greater consumer awareness of the need to support small businesses throughout the pandemic, which has helped businesses to build stronger ties with customers, which is likely to continue post-pandemic.

For example, during the pandemic, Fetch The Drinks launched the Fetch Cider Club, which offered drinks from predominantly specialist and independent producers that use traditional methods, appealing to rising consumer demand while pubs and restaurants were forced to close.

Elsewhere, Books That Matter's subscription service offered boxes centred around books written by a woman or non-binary author, containing three gifts made by independent women makers, highlighting topical content but also improving the reach of smaller book specialists.

The market

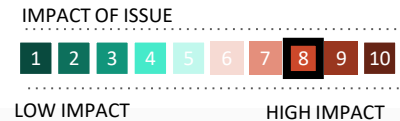
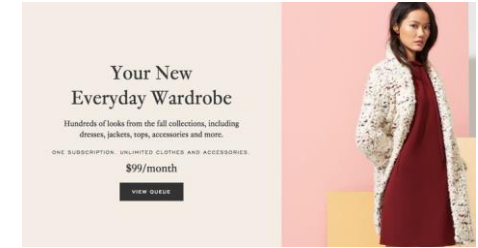
Key issues & trends in the subscription market

The market



ESG initiatives for subscription boxes

There has been a major drive for businesses to consider environmental, social and governance (ESG) factors within operations, and many subscription box businesses have embraced the environmental and social components of the ESG framework. As awareness about sustainability continues to rise, shoppers are looking for environmentally-friendly alternatives or measures to incorporate into their daily lives. In response to consumers' growing concerns about sustainable practices, several subscription service providers have made attempts to negate the impact of the business on the environment through engaging in various sustainable initiatives. As awareness and demand for accountability spreads, more and more businesses – including subscription service providers – will engage further with the theme of ESG, to create a strong brand image, and do their part for the environment.



As the population moves towards embracing subscription-based models for goods and services, subscription businesses must consider and deliver on ESG requirements. Several subscription businesses are already considering ESG factors and have sustainability as an important pillar of their strategy.

Smol, a subscription service that provides household essentials such as laundry detergents, largely focuses on environmental initiatives. Its packaging is made from recycled plastic, saving over 150 tonnes from landfill each year, while its laundry capsules are less chemically concentrated saving over 350 tonnes of chemicals per year. Moreover, the subscription service also has surface sprays that are delivered in glass bottles reducing the use of plastic in its products.

Bloom & Wild is a florist that also strongly embraces sustainability practices. Some of its initiatives include working towards making its letterbox packaging 100% recyclable and structuring its business in a way to ensure that it is zero waste by setting in place procedures such as strict forecasting and partnering with local florists. It also holds 'eco sales', where it sells overstocked flowers to customers at a reduced price, rewarding customer loyalty and minimising waste on items that have a shorter shelf life. Bloom & Wild encourages shoppers to engage in sustainable practices themselves, by providing suggestions and guidance on how to live a more sustainable life.

The sustainable subscription practice has also expanded to include clothing & footwear items. To prevent high levels of clothing from ending up in landfill and encourage sustainable consumption of apparel, Rent The Runway created a subscription service that allows members to access a forever rotating closet of designer clothing and accessories. Subscription users can get either four, eight or 16 items per month, depending on the plan selected and consumers can wear the items for as long as they want. When ready consumers can either send items back or purchase the item. Not only is the core of Rent the Runway's business sustainable, but items also have sustainable packaging, where it deliver clothes in reusable garment bags and recycle any plastic it can, encouraging consumers to send back any plastic from items they receive.

Social initiatives are also extremely important; for instance, Harry's, a men's grooming subscription service, has a strong social mission at its core. The subscription business strives to support men's mental health by donating 1% of sales to non-profits helping men access to therapy and other mental health resources. Globally it has donated over \$5mn and is working with 14 charities worldwide to drive its social causes.

Market size & growth

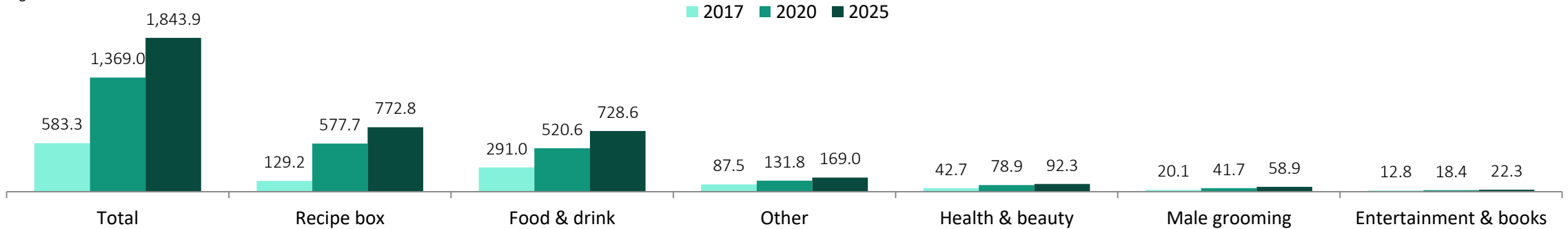
The market



Food & drink and recipe subscription boxes witnessed the highest growth year-on-year in 2020, as grocers' online capacity was stretched to the limit and consumers turned to alternative retailers for regular food deliveries

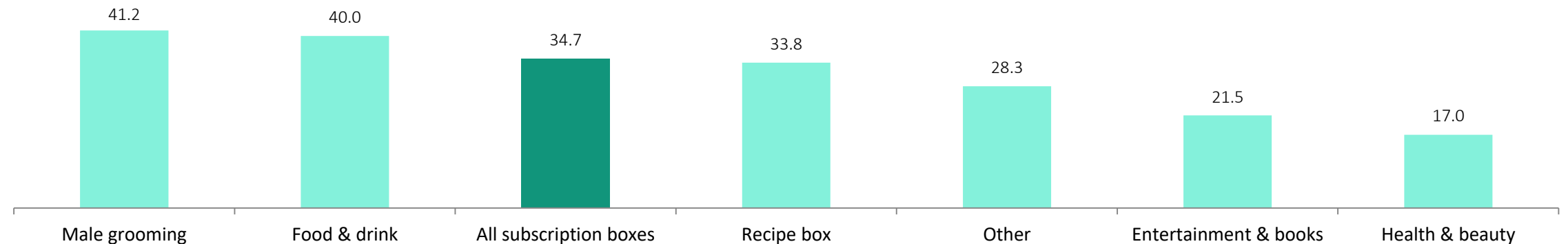
2017, 2020 and 2025 value of the subscription box market

Figures on the chart are £millions



Forecast growth in the subscription box market (2020-2025)

Figures on the chart are percentages



The market

Giftling spend

The market



Categories such as health & beauty and entertainment & books appeal to consumers gifting subscription boxes, with these services seeing far stronger growth within gifting compared to buying for self-use between 2017 and 2020.

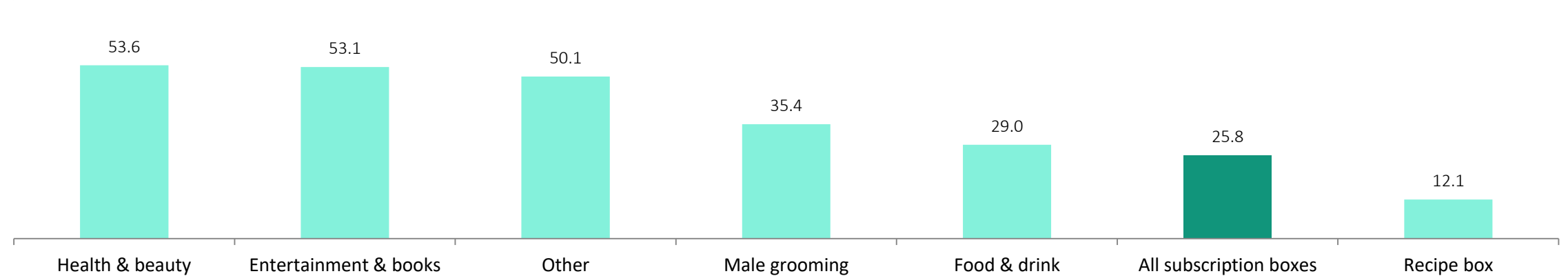
Spend on gifting vs. spend for myself by category 2020

Figures on the chart are £millions



Proportion of spend on gifting by category 2020

Figures on the chart are percentages



The market

Delivery volumes

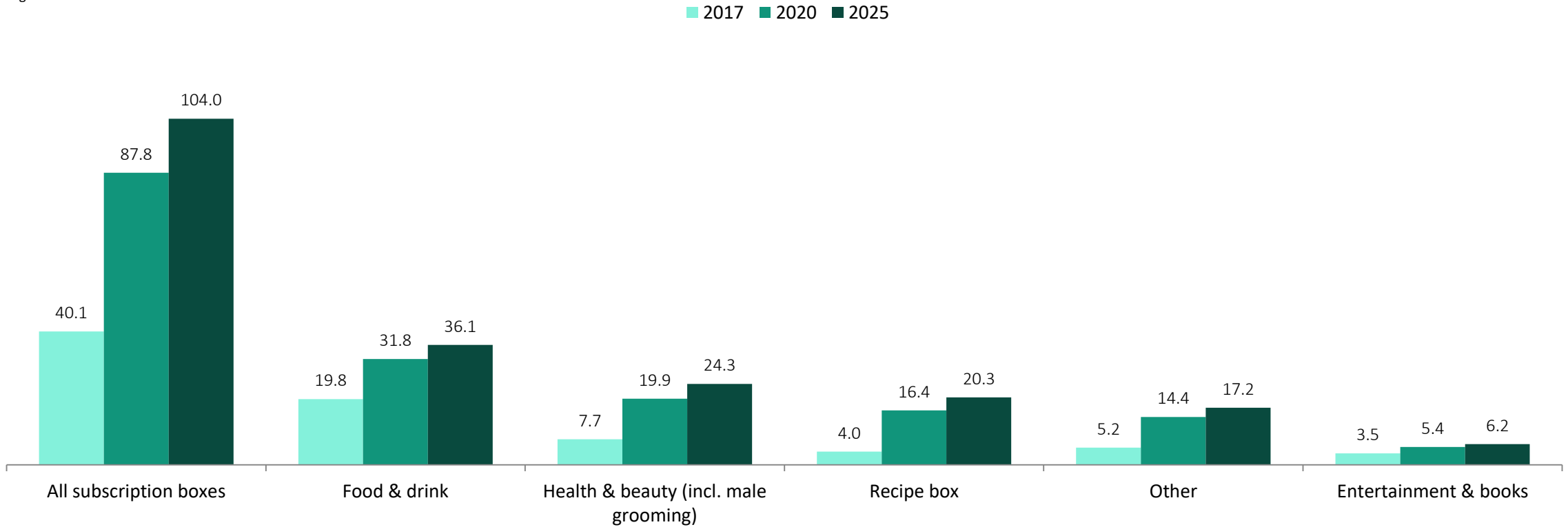
The market



Delivery volumes rose substantially between 2017 and 2020, as the COVID-19 pandemic shifted spending online

Delivery volumes per year

Figures on the chart are millions of deliveries



The market

Subscription brand market shares

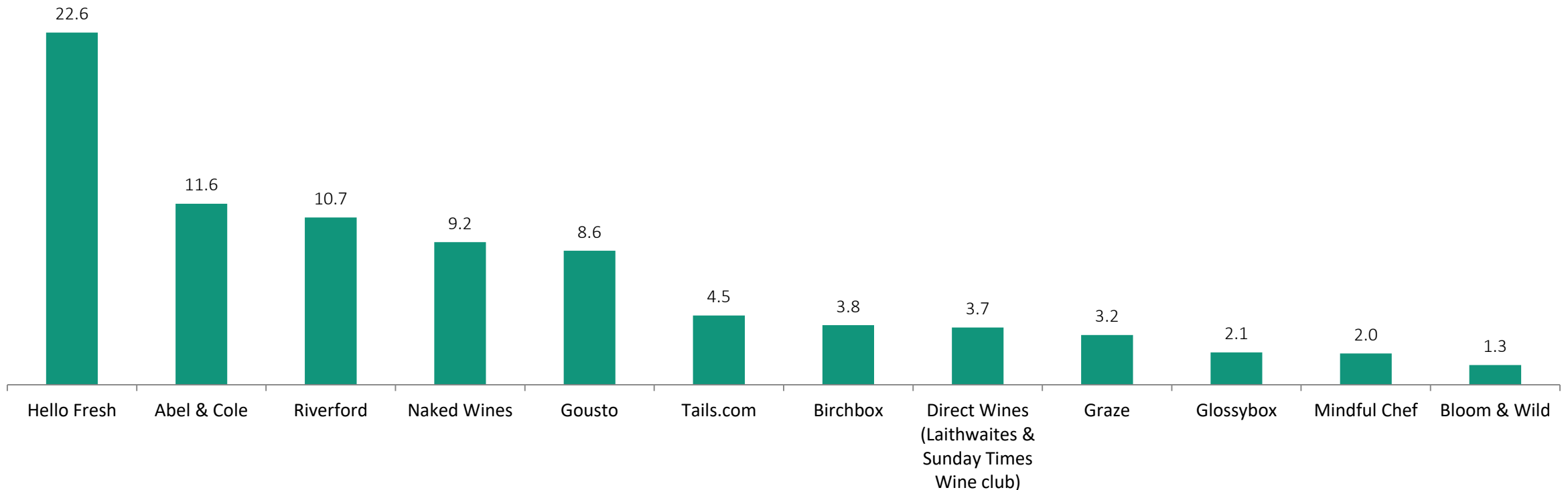
The market



- Food & drink brands continue to dominate the market, with HelloFresh gaining significant market share during the COVID-19 pandemic
- Beauty services, such as Birchbox, have consolidated their position in the market, while Bloom & Wild leads the way in flower subscription services

Market share of leading subscription brands 2020

Figures on the chart are percentages



The market



The consumer



1. OVER A QUARTER OF UK SHOPPERS ARE SIGNED UP TO SUBSCRIPTION BOX SCHEMES

- 29.6% of UK shoppers are currently signed up to at least one subscription box, with these schemes proving to be most popular among younger demographics. For those aged 18-24, 65.9% stated that they had signed up to at least one plan, compared to only 10.8% of those aged 55-64 and 11.6% of those aged 65+. Yet, with older demographics shopping more frequently online than previously, as a direct result of the COVID-19 pandemic, subscriptions operators have opportunities to grow appeal among these older demographics.
- Equally, subscription boxes typically appeal to time-short consumers, particularly those boxes providing essential items, such as razors and replacement blades or sanitary products. Retailers must highlight the time saved through using these services to boost appeal further.

2. HIGH DEMAND AMONG SUBSCRIPTION BOX SHOPPERS AS THE MAJORITY ARE SIGNED UP TO MULTIPLE SERVICES

- Among consumers that have bought into the subscription box style of shopping, the trend is towards more active use of these services, with almost three quarters signed up to more than one subscription box, up from 61.4% in 2018. This has also been seen at higher ownership frequencies, with 55.6% of box subscribers signed up to four or more compared to 36.6% in 2018. With these shoppers having already experienced the benefits of these services, they are more willing to try subscription boxes of a different type.
- While there is still an opportunity to appeal to these consumers to buy into other subscription services, growth must be driven by encouraging more consumers to shop a subscription box for the first time. During the COVID-19 pandemic, 54.6% of consumers stated that they signed up to a subscription box service because they wanted to treat themselves. Those selling boxes such as letterbox flowers, health & beauty and fashion & jewellery boxes should ensure marketing highlights the self-gifting element of this service to grow appeal.

3. YOUNGER SHOPPERS SEE THE APPEAL OF GIFTING SUBSCRIPTIONS

- The appeal of gifting subscription boxes declines among older age groups, with 21.0% of 65+ shoppers stating that they bought these as a gift for someone else, compared to 72.0% of 18-24-year-olds. It is also evident that younger shoppers are more likely to not only buy for self-use, but also to gift others. Operators should offer loyalty discounts to shoppers that already subscribe, encouraging more consumers to sign up for multiple subscriptions.
- The gifting of subscription boxes is inevitably more prevalent among those categories that contain more giftable items, such as fashion & jewellery, mystery boxes and plants & flowers. Retailers could also offer additional incentives to shoppers purchasing a box as a gift, e.g. one item or a sample box delivered to the sender, with this potentially enticing the shopper to sign up to the same box for themselves later.



The consumer: purchasing

Penetration of subscription services

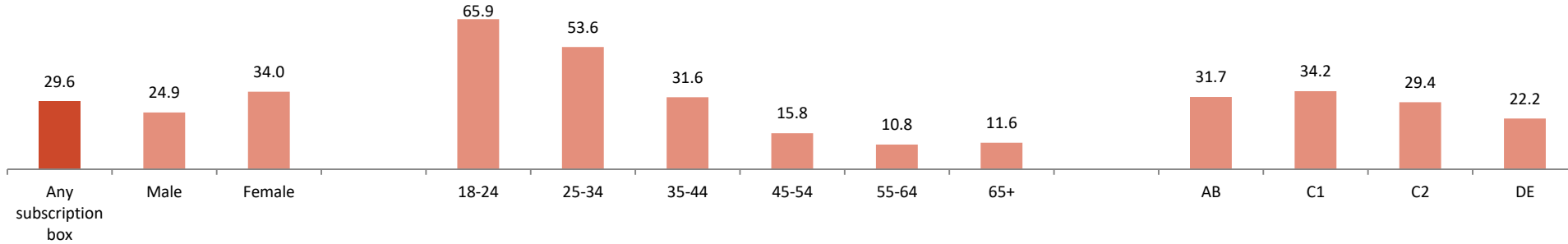
Purchasing



- Over a quarter of shoppers are currently signed up to a subscription service
- Popularity is highest among under 35s, peaking at 65.9% among 18-24s

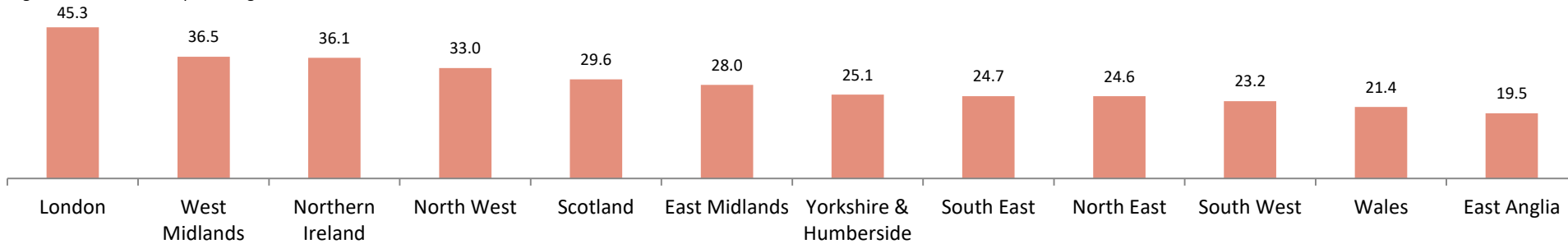
Proportion of shoppers signed up to subscription services by age, gender and social grade

Figures on the chart are percentages



Proportion of shoppers signed up to subscription services by UK region

Figures on the chart are percentages



The consumer



Top chart shows the proportion of shoppers in each demographic group who are currently signed up to a subscription box service. Bottom chart shows the same by UK region.

Penetration of subscription services and brands

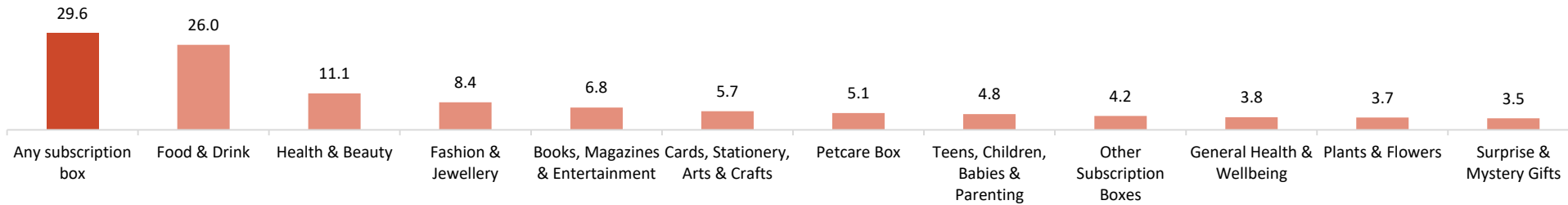
Purchasing



Food & drink subscription boxes are the most popular, and have been boosted by the COVID-19 pandemic

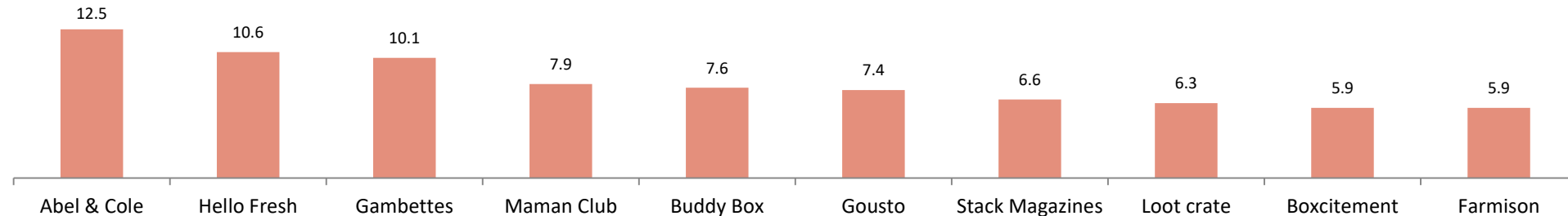
Proportion of shoppers currently signed up to each type of subscription box service

Figures on the chart are percentages



Most popular subscription box brands

Figures on the chart are percentages



The consumer



Top chart shows the proportion of all shoppers signed up to each type of subscription box service. Chart at the bottom shows the top brands subscription box shoppers are signed up to.

Penetration of subscription services by demographic

Purchasing



Younger shoppers are more likely to be signed up to a subscription box, with the having highest purchasing penetration across all categories

Proportion of shoppers in each demographic group who are currently signed up to each type of subscription box service

Figures on the chart are percentages

	Overall	Male	Female	18-24	25-34	35-44	45-54	55-64	65+	AB	C1	C2	DE
Food & drink	26.0	21.7	30.0	62.2	49.3	28.3	11.3	8.3	8.6	28.1	31.2	24.7	18.9
Health & beauty	11.1	8.5	13.7	32.5	18.4	13.1	4.4	3.2	2.8	12.6	12.4	13.0	6.5
Fashion & jewellery	8.4	6.9	9.9	24.2	14.4	9.6	3.2	2.5	1.4	8.6	11.1	8.9	4.8
Books, magazines & entertainment	6.8	6.0	7.5	18.3	10.8	6.4	2.4	2.2	2.2	6.9	7.1	5.5	7.3
Cards, stationery, arts & crafts	5.7	4.4	6.9	15.3	11.1	5.5	1.9	1.3	0.6	5.3	6.5	6.1	4.8
Petcare box	5.1	4.1	6.1	12.9	7.4	4.4	2.5	2.2	1.6	4.8	5.9	4.6	5.0
Teens, children, babies & Parenting	4.8	3.9	5.7	13.9	9.6	4.1	1.1	0.9	0.9	4.4	5.9	4.4	4.4
Other subscription boxes	4.2	3.6	4.7	11.1	7.3	4.2	1.1	0.6	1.6	4.3	5.5	2.4	4.1
General health & wellbeing	3.8	3.2	4.4	12.9	6.3	4.5	1.1	0.3	0.3	3.7	4.7	3.7	3.0
Plants & flowers	3.7	3.1	4.2	12.5	5.1	3.2	1.7	1.8	0.3	4.1	4.3	3.3	3.0
Surprise & mystery gifts	3.5	3.4	3.7	11.3	6.0	2.3	1.8	0.0	0.9	4.1	3.5	3.1	3.3

The consumer


i Table shows the proportion of shoppers in each demographic group who are signed up to each type of subscription box service.

■ Highest value
 ■ Above average
 ■ Average
 ■ Below average
 ■ Lowest value

Number of schemes signed up to

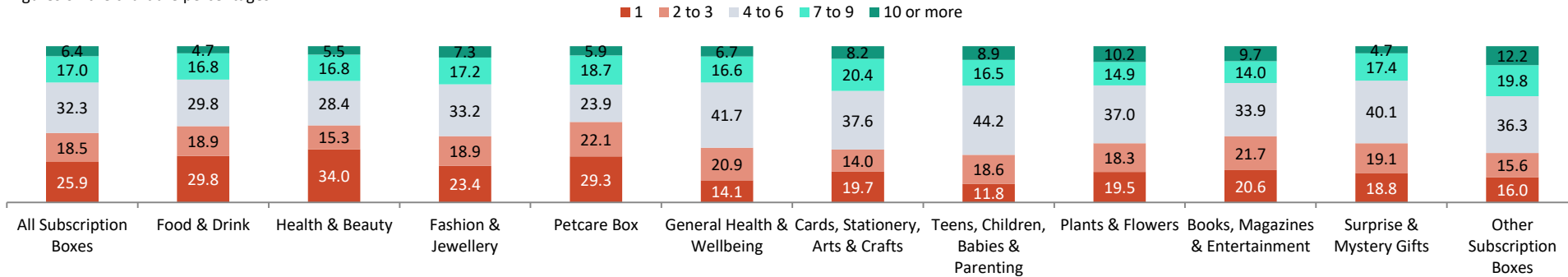
Purchasing



 74.1% of subscription box shoppers are signed up to more than one subscription scheme, while over half (55.6%) are signed up to four or more subscription schemes

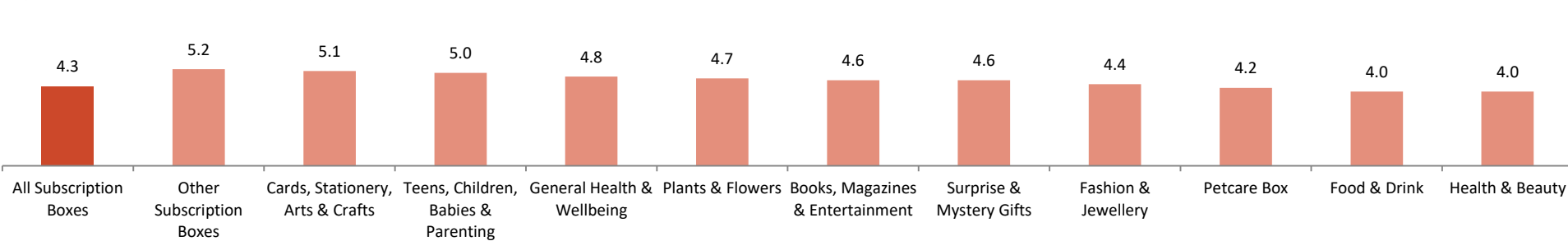
Number of subscription services signed up to


Figures on the chart are percentages



Average number of subscription services signed up to by category

Figures on the chart are percentages



 Top chart shows the proportion of subscription shoppers signed up to each number of services. Chart at the bottom shows the average number of services shoppers are signed up to by category. Only shoppers who are currently signed up to at least one subscription service are included in the sample.

The consumer

Number of schemes signed up to by demographic

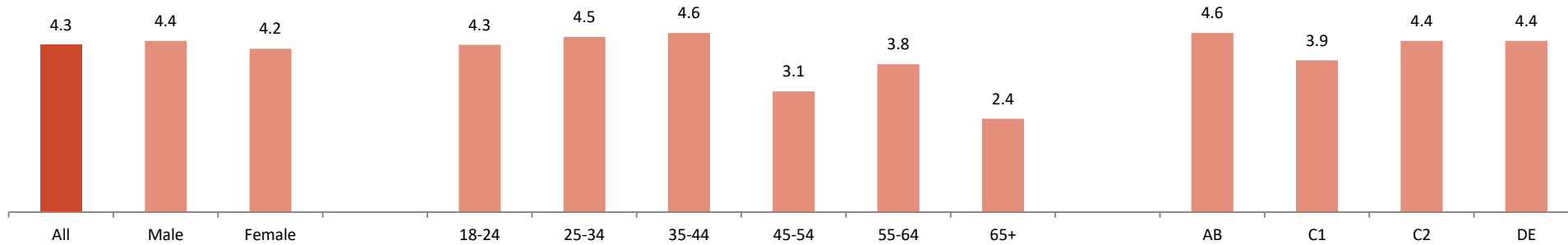
Purchasing



Under 45s are signed up the most subscription plans, with those aged 35-44 signing up to an average of 4.6 subscription schemes

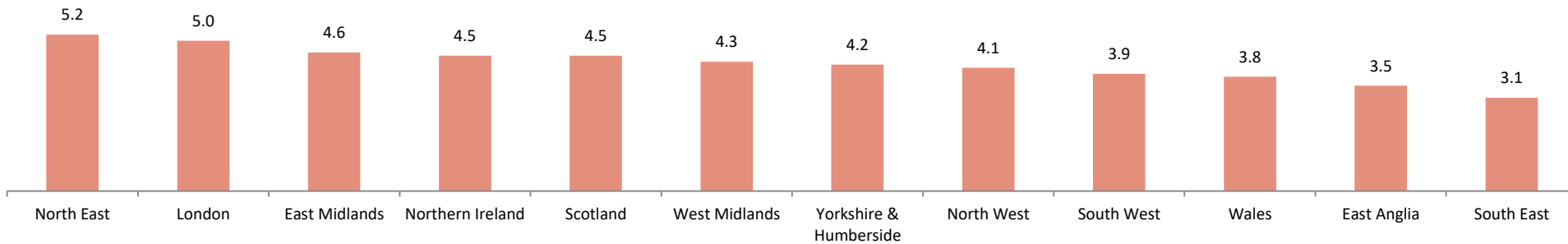
Average number of subscription services signed up to by gender, age and social grade

Figures on the chart are percentages



Average number of subscription services signed up to by region

Figures on the chart are percentages



The consumer



Top chart shows the average number of subscription box services shoppers in each demographic group are signed up to. Bottom chart shows the same by UK region. Only shoppers who are currently signed up to at least one subscription service are included in the sample.

Purpose of purchase by demographics

Purchasing

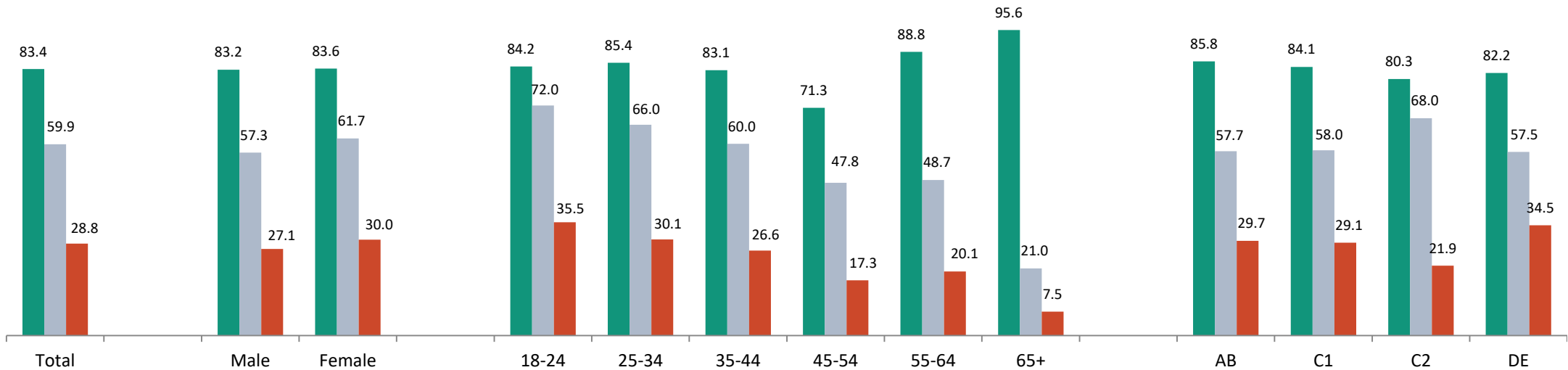


Almost 60% of consumers purchased a subscription box as a gift

Purpose of subscription service purchase by demographics

Figures on the chart are percentages

■ I bought for myself ■ I bought as a gift for somebody else ■ Somebody bought it for me as a gift



The consumer

Chart shows the reasons shoppers gave for why they are signed up to each type of subscription box service.

Purpose of purchase by type of subscription

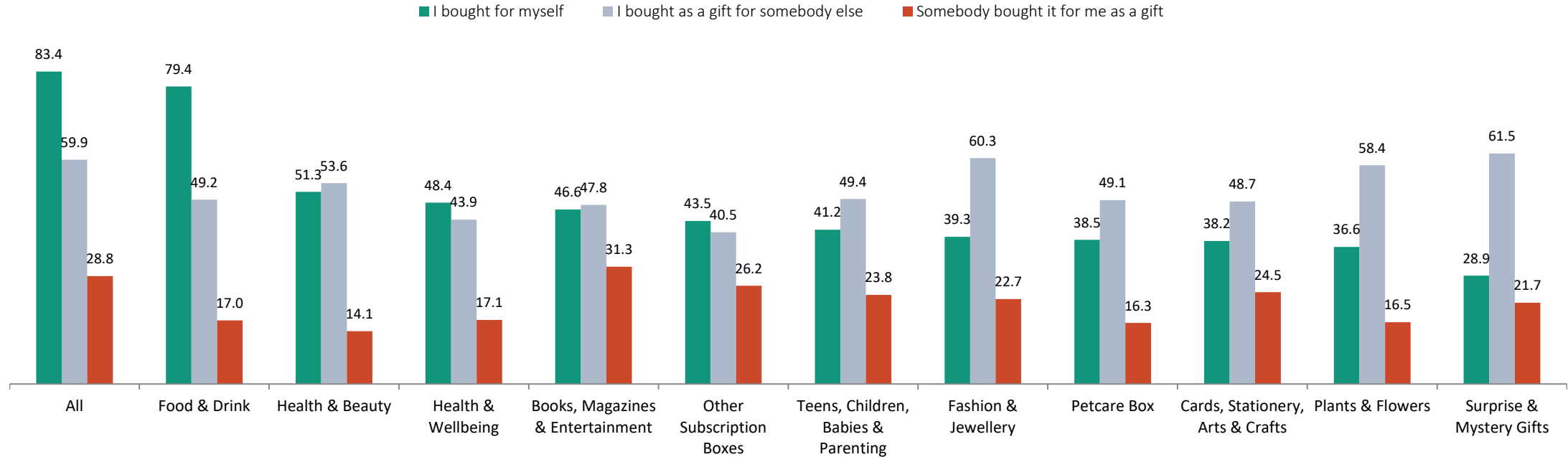
Purchasing



Gifting subscription boxes is most appealing among more giftable categories, such as fashion & jewellery and plants & flowers

Purpose of subscription service purchase by type of subscription

Figures on the chart are percentages



The consumer

Chart shows the reasons shoppers in each group gave for why they are signed up to a subscription box service.



The consumer: drivers & barriers

Demand drivers

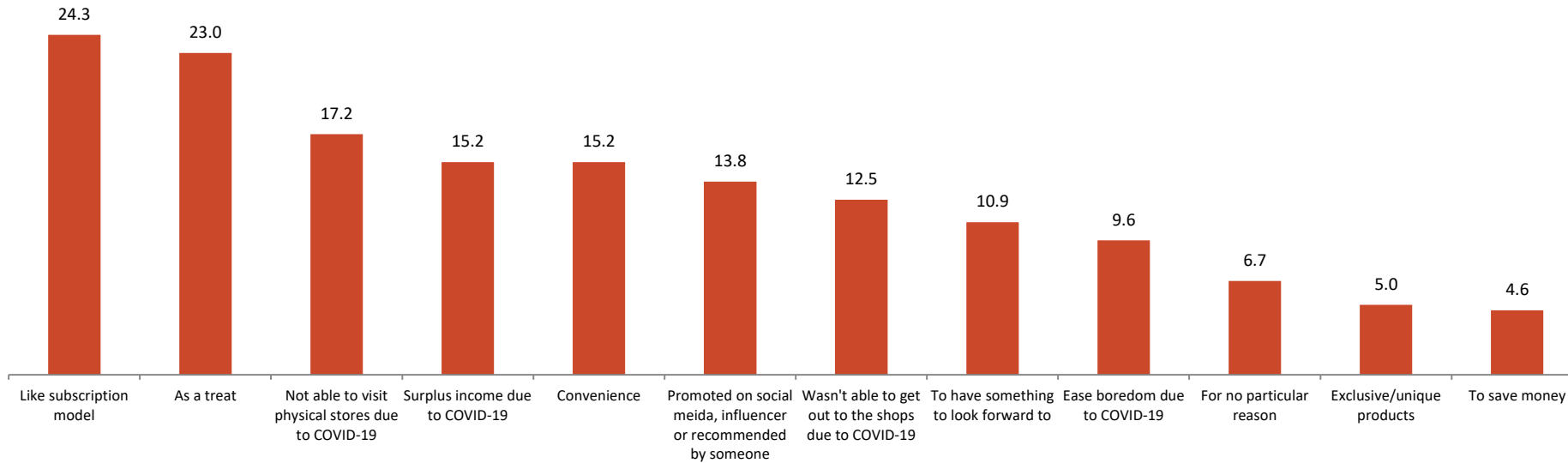
Drivers & barriers



The mystery element of subscription boxes can appeal to those looking to treat themselves

Reasons shoppers signed up to subscription box services for themselves

Figures on the chart are percentages



The consumer



Chart above shows the reasons why shoppers signed up to a subscription box service for themselves.

Demand drivers by demographic

Drivers & barriers



Females, between the ages of 25-54, were more likely to treat themselves to subscriptions schemes than average, with boxes from the likes of Birchbox and Bloom & Wild appealing to this demographic

Reasons shoppers signed up to subscription box services for themselves by demographics

Figures on the chart are percentages

	Overall	Male	Female	18-24	25-34	35-44	45-54	55-64	65+	AB	C1	C2	DE
Like the subscription model	24.3	28.4	21.4	21.5	23.7	20.5	30.2	32.6	26.8	28.4	28.9	13.8	21.2
As a treat	23.0	20.9	24.5	19.0	27.1	30.7	27.4	23.0	9.2	23.9	26.4	21.7	17.0
Not able to visit physical stores due to COVID-19	17.2	17.8	16.7	22.0	19.8	13.6	6.9	9.4	16.2	13.6	16.5	24.3	16.3
Surplus income due to COVID-19	15.2	12.3	17.2	13.6	22.4	18.1	4.4	3.6	6.8	20.3	13.1	14.2	11.5
Convenience	15.2	18.7	12.8	12.9	16.4	6.9	18.8	29.2	27.1	18.8	14.2	11.2	15.5
Social media, influencer or recommendation	13.8	13.1	14.4	12.7	18.1	15.5	12.5	6.9	4.7	12.1	13.5	16.9	13.8
Wasn't able to get out to the shops due to COVID-19	12.5	15.4	10.4	10.7	15.2	15.3	6.9	12.2	11.1	19.7	6.1	11.5	12.8
To have something to look forward to	10.9	6.7	13.8	8.3	10.5	16.2	10.5	20.3	2.3	11.0	14.8	10.2	4.6
To ease boredom due to COVID-19	9.6	9.7	9.5	9.0	13.3	10.2	7.2	9.3	0.0	11.8	9.1	9.3	7.1
For no particular reason	6.7	5.3	7.6	7.8	2.8	6.5	7.3	9.6	12.3	5.2	4.7	7.5	11.5
Exclusive/unique products	5.0	3.6	6.0	2.7	3.3	2.3	10.5	13.1	11.4	4.2	6.9	5.5	2.5
To save money	4.6	4.9	4.4	2.6	2.0	5.5	10.4	13.6	8.9	3.8	2.2	5.8	9.1
Other	3.6	4.0	3.2	0.0	0.7	2.4	11.5	6.3	14.6	5.0	3.6	0.9	4.1

The consumer

i Table above shows the reasons shoppers in each demographic group gave for why they are signed up to a subscription service.

■ Above average
 ■ Average
 ■ Below average

Length of time shoppers have been signed up for

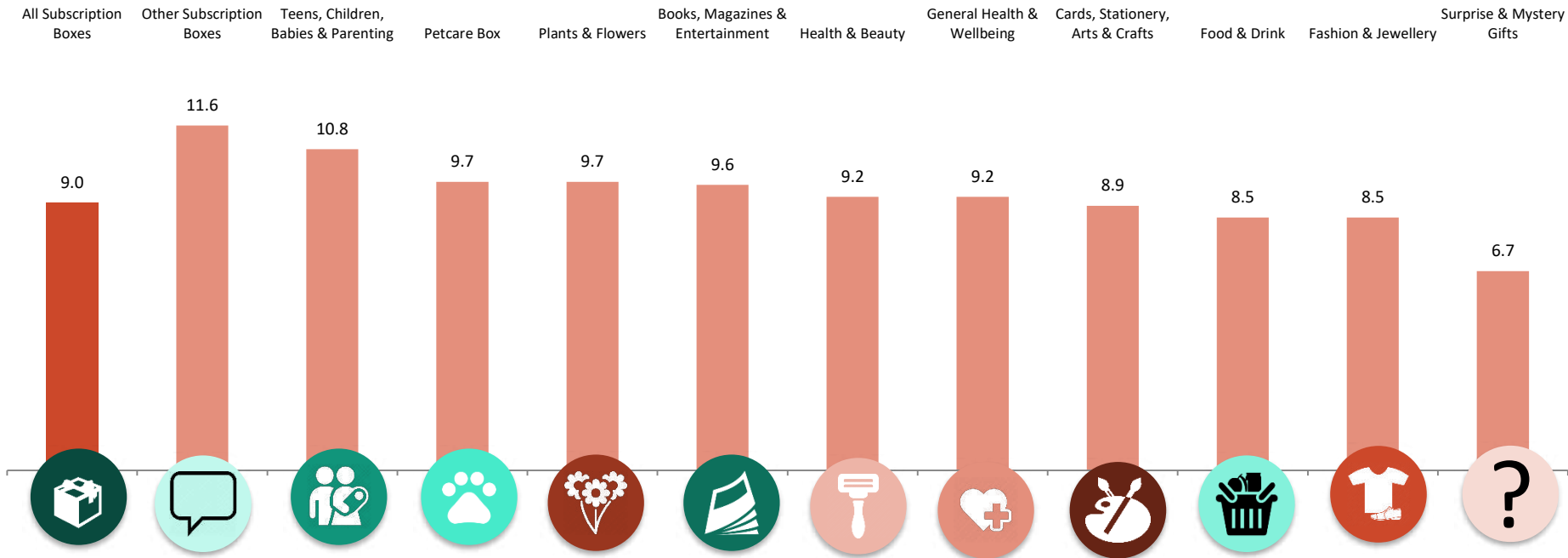
Drivers & barriers



On average, shoppers said that had been signed up to subscription boxes for 9.0 months. This is up from 5.6 months in 2018, as consumers are increasingly used to the subscription model

Average number of months shoppers have been signed up to each subscription service for

Figures on the chart are number of months




The consumer

Chart shows the average number of months shoppers sign up to each subscription service.

Demand drivers – during COVID-19 pandemic

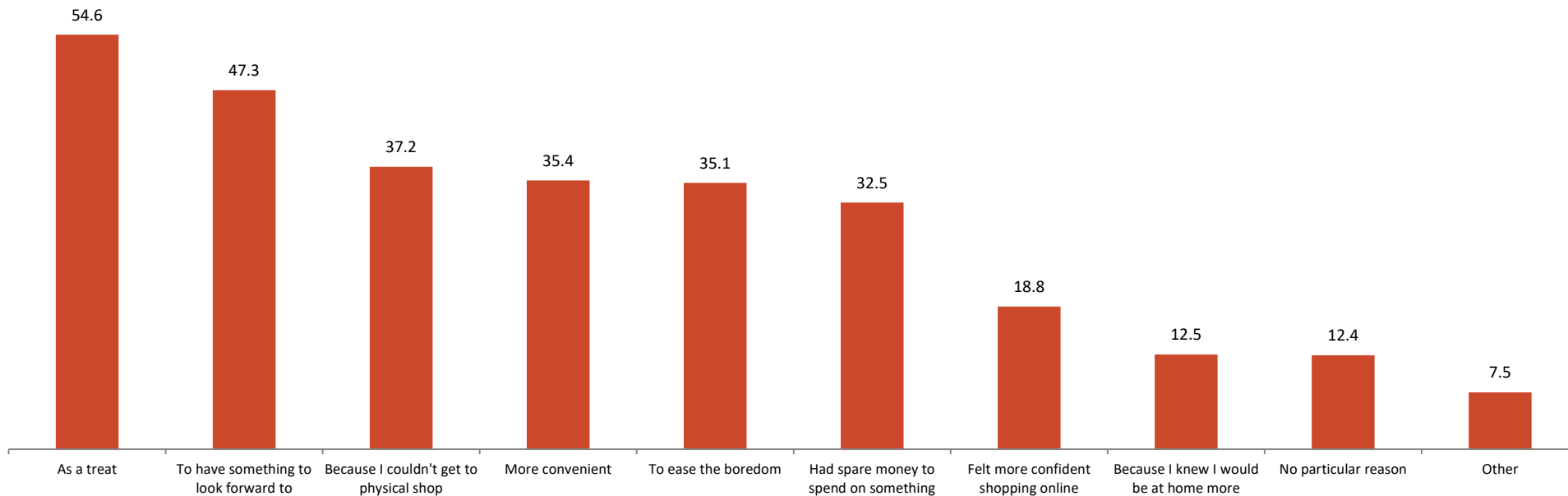
Drivers & barriers




 Most shoppers were likely to sign up to a subscription box for the first time over the past year to treat themselves

Reasons shoppers signed up to subscription box services for themselves for the first time over the past year

Figures on the chart are percentages



The consumer

 Chart above shows the reasons why shoppers signed up to a subscription box service for themselves over the past 12 months, these consumers signed up to a subscription box service during the COVID-19 pandemic in the UK.

Barriers to purchasing subscription boxes

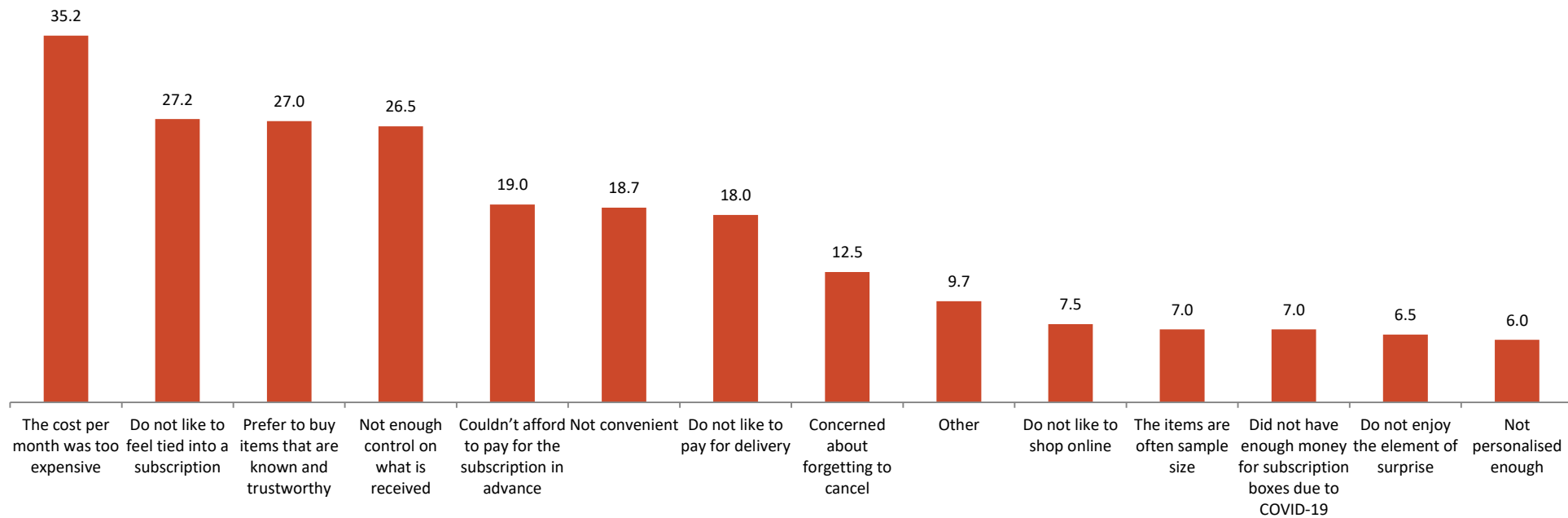
Drivers & barriers



Over a third of shoppers stated that they had not purchased a subscription box in the past 12 months due to the monthly cost being too high

Reasons given for why consumers have not purchased a subscription box in the past 12 months

Figures on the chart are percentages



The consumer

Chart shows reasons shoppers gave for why they have not signed up to a subscription service in the past 12 months.

Opinions regarding subscription box services

Drivers & barriers



61.0% of consumers stated that they did not see these products as good value for money

Agreement/disagreement for subscription box statements

Figures on the chart are percentages

Strongly agree Agree Disagree Strongly disagree

I have signed up to more subscription boxes since the start of the COVID-19 pandemic



I prefer to curate the entire contents of my box, i.e. chose all the items included



Free delivery offers encourage me to sign up for a longer time period e.g. 12 months



I use social media to introduce me to subscription box services e.g. sponsored posts by influencers



Subscription boxes do not offer good value for money



Delivery of subscription boxes should be free



I wish more retailers/brands offered subscription boxes



The consumer

Chart shows agreement and disagreement to the above statements regarding subscription boxes.

Opinions regarding subscription box services

Drivers & barriers

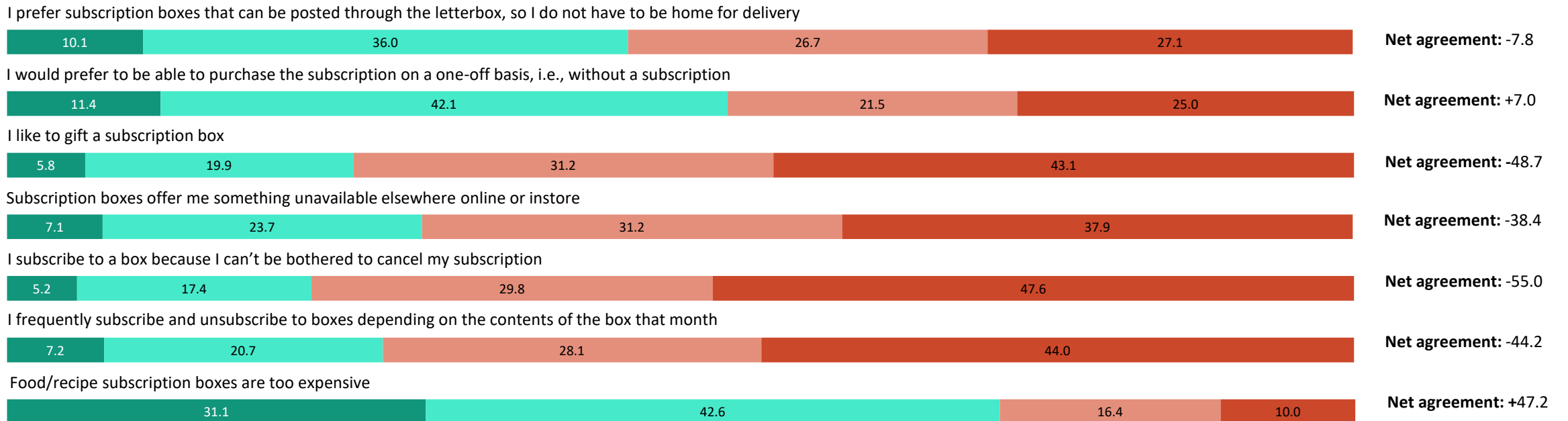


With the appeal of food & drink subscription at an all time high, retailers should look at affordable options, e.g. for consumers that live alone

Agreement/disagreement for subscription box statements

Figures on the chart are percentages

Strongly agree Agree Disagree Strongly disagree



The consumer

Chart shows agreement and disagreement to the above statements regarding subscription boxes.



The consumer: delivery

Delivery methods used

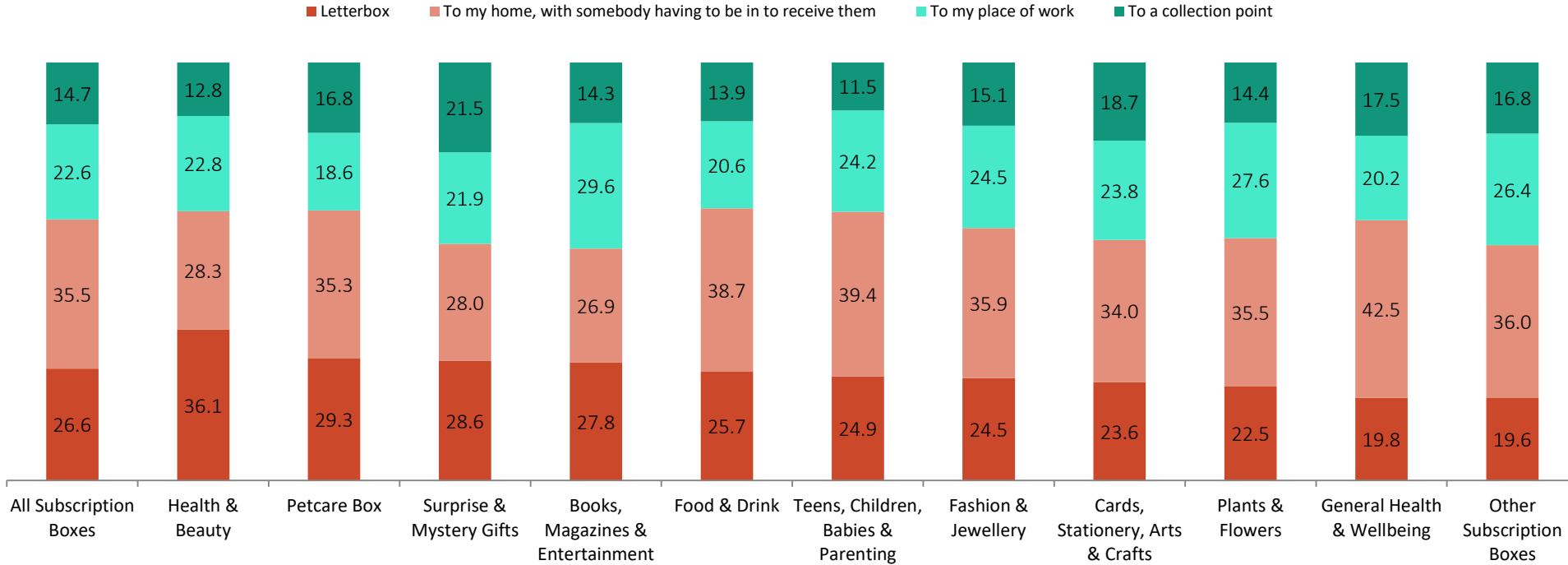
Delivery



26.6% of all subscription boxes are delivered through a letterbox, rising to 36.1% for health & beauty boxes, as consumers increasingly look to convenient delivery options

How subscription boxes are normally delivered

Figures on the chart are percentages



The consumer

Chart shows how each type of subscription service is normally delivered.



The consumer: future intentions

Future intentions to use existing subscription schemes by demographic



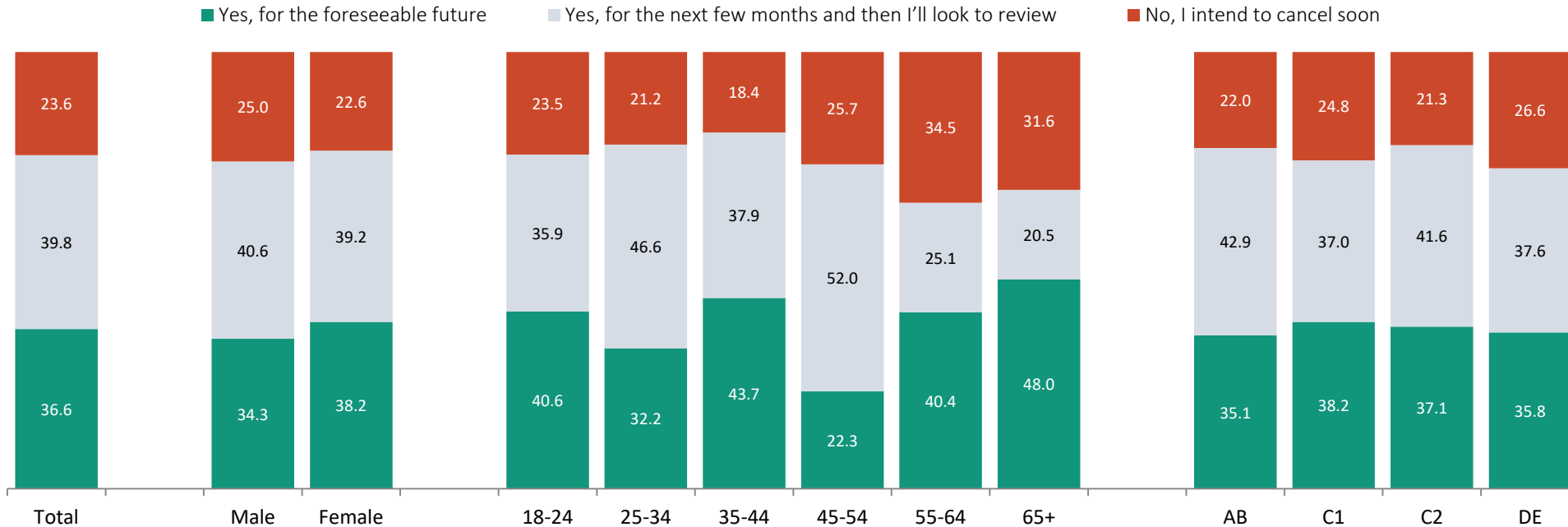
Future intentions



Just over three quarters of shoppers are planning to either continue or increase their subscription services in the future. Those aged 65+ intend to use subscription schemes more than any other age group in the foreseeable future, driven by the simplicity these boxes offer as well as many still limiting the number of shopping trips they go on

Intentions to use subscription services in the future

Figures on the chart are percentages



The consumer

Chart shows whether shoppers intend to change their use of subscription services in the future.

Future intentions to use existing subscription schemes by type

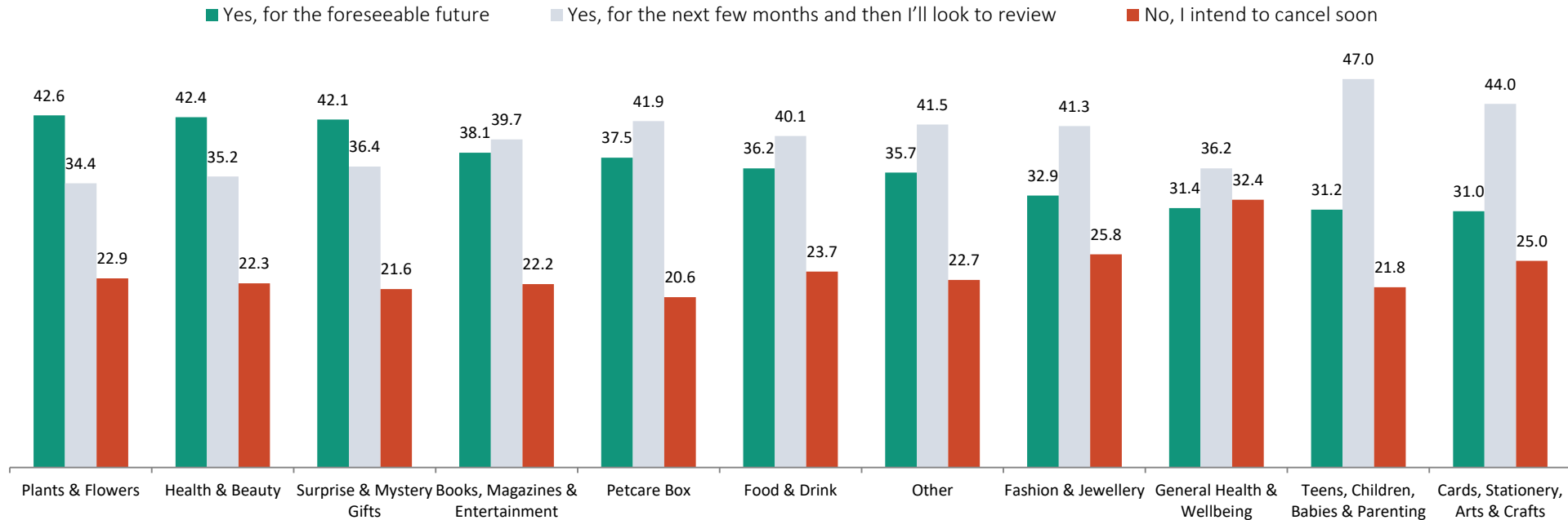
Future intentions



There are only three categories where more consumers state that they intend to use their subscriptions for the foreseeable future: plants & flowers, health & beauty and surprise & mystery gift subscriptions

Intentions to use/cancel subscription services in the future

Figures on the chart are percentages



The consumer

Chart shows whether shoppers intend to change their use of subscription services in the future.



Methodology & Contacts

DEFINITION OF THE SUBSCRIPTION BOX MARKET

A subscription box is a recurring, physical delivery of products packaged as an experience and designed to offer additional value on top of the actual retail products contained in the box, such as through surprise, a saving on what is on offer in the shops, or by giving the user a chance to experiment with a tailored selection of products.





BASIC METHODOLOGY

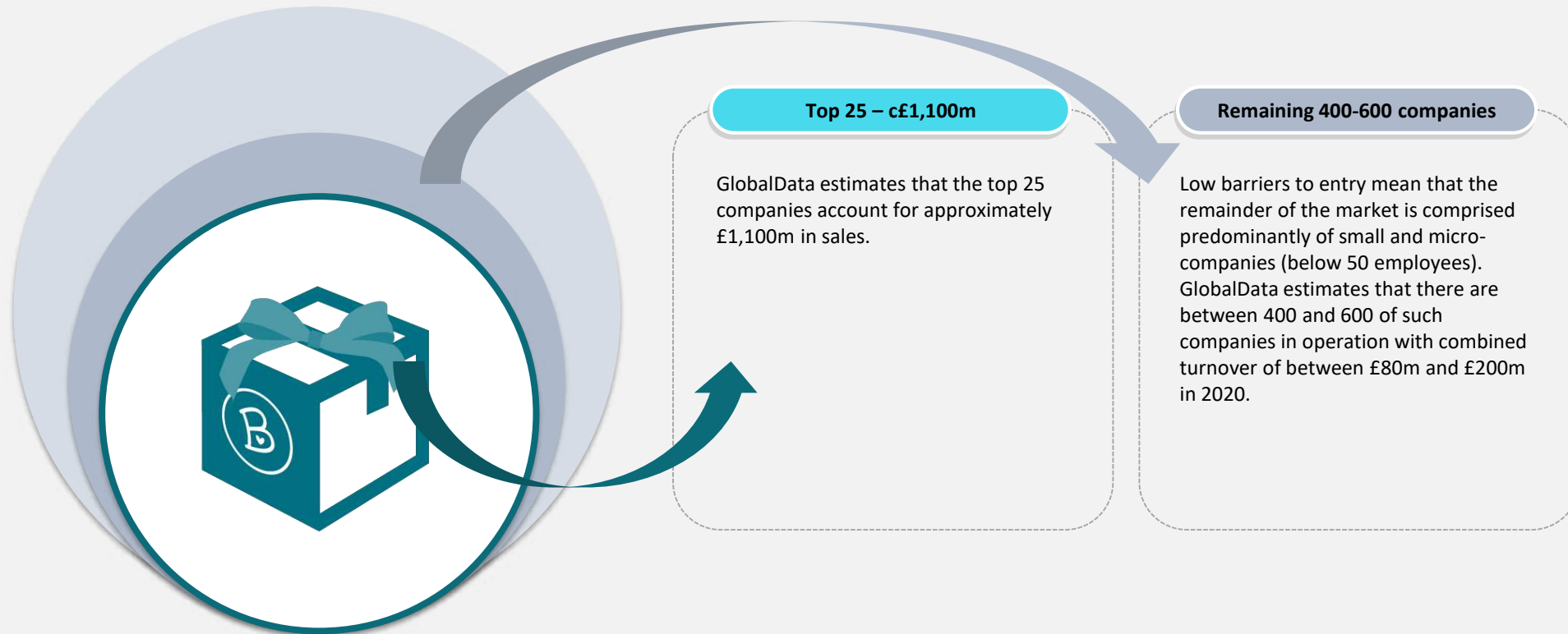
GlobalData undertook a bespoke, nationally-representative consumer survey of 2,000 consumers to understand penetration, attitudes and shopping habits in the subscription retail market.

Technical details: sizing the market



SIZING THE MARKET METHODOLOGY

The volume of small operators in the market makes it challenging to measure, meaning the total value of the market in 2020 could be as much as £1,500 million



i Only a handful of companies in this market meet the thresholds for which they are required to report turnover to Companies House.



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