

Global Subscription E-commerce Market: Analysis By Application Type (Beauty and Personal Care, Food and Beverages, Entertainment and Others), By End User (Women, Men and Kids), By Mode of Payment (Online Payment and Cash On Delivery), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

<https://marketpublishers.com/r/G250CA167775EN.html>

Date: January 2023

Pages: 155

Price: US\$ 2,350.00 (Single User License)

ID: G250CA167775EN

Abstracts

The global subscription e-commerce market was valued at US\$96.61 billion in 2022. The market value is forecasted to grow to US\$2419.69 billion by 2028. Subscription e-commerce is a way of purchasing goods and services online in which customers can sign up for subscriptions to receive the products or services on a recurring basis. Customers who opt for subscriptions receive their products through monthly or weekly boxes, known as subscription boxes. Customers can subscribe to certain products with the seller which are required by them cyclically.

The factors such as growing use of subscriptions among millennials, rapid urbanization, rising popularity of online streaming services, increasing internet penetration and growing use of mobile devices, are expected to drive the overall market growth in the forecasted period. The market is anticipated to grow at a CAGR of approx. 71% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Application Type: The report provides the bifurcation of the market into four segments based on application type: beauty and personal care, food and beverages, entertainment and others. Entertainment subscription e-commerce market is the fastest

growing segment of global subscription e-commerce market owing to rising penetration of internet, wide variety of exclusive content available in different languages, increased convenience of accessing these services from any device and cost effectiveness in terms of lower price charged as compared to TV cables.

By End User: The report provides the bifurcation of the market into three segments based on end user: women, men and kids. Women subscription e-commerce market is both the largest and fastest growing segment of global subscription e-commerce market owing to rising number of working women, increasing presence of startups which are offering numerous feminine products and cosmetics, increasing penetration of social media trends and expanding e-commerce sector.

By Mode of Payment: The report provides the bifurcation of the market into two segments based on mode of payment: online payment and cash on delivery. Online payment subscription e-commerce market is both the largest and fastest growing segment of global subscription e-commerce market owing to digitalization, increasing trend of online shopping, many digital subscription services complying to online payments, increasing government initiatives to promote cashless economy and rising scope of payment wallets among younger generation.

By Region: The report provides insight into the subscription e-commerce market based on the regions namely North America, Europe, Asia Pacific and rest of the world. North America subscription e-commerce market holds the largest share in global subscription e-commerce market owing to expanding e-commerce industry, growing influence of social media platforms & celebrity endorsements on consumer lifestyles, rapid digitalization of businesses and rising adoption of cloud solutions contributing significantly to the expansion of digital commerce in the region.

Whereas, Asia Pacific subscription e-commerce market is the fastest growing region of global subscription e-commerce market owing to large consumer base, rapid urbanization, increasing penetration of internet, massive sales volumes and thriving social and mobile commerce ecosystem along with continuous launch of innovative subscription boxes by leading brands. The Asia-Pacific subscription e-commerce market is divided into five regions on the basis of geographical operations, namely, China, Japan, India, South Korea and rest of Asia Pacific where China subscription e-commerce market holds the largest share of Asia Pacific subscription e-commerce market.

Market Dynamics:

Growth Drivers: The global subscription e-commerce market has been growing over the past few years, due to factors such as growing use of subscriptions among millennials, rapid urbanization, rising popularity of online streaming services, increasing internet penetration, growing usage of mobile devices, rising purchasing power, low cost of subscription boxes, etc. The preferences of the people, especially young generation, are shifting from traditional TV to online media because of the access to unlimited content provided to the users at a reasonable price. Moreover, online streaming services give the users the flexibility and convenience of watching a large number of TV shows, movies, news, sports, etc. from any device at any point of time. With rising disposable incomes, people are becoming more willing to pay for such subscription services in return for unlimited access to online media, creating a positive demand for subscription e-commerce services, boosting the growth of global subscription e-commerce market.

Challenges: However, the market growth would be negatively impacted by various challenges such as e-commerce fraud, low adoption of subscription boxes in developing countries, etc. The use of subscription-based services are prevalent in the developed regions of the world, such as the US, but the adoption of subscription boxes in developing countries is still quite low. A major portion of the population in developing countries have lower disposable income as compared to developed nations, making it difficult for the people to sign up for subscription boxes in these countries.

Trends: The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as rising use of social media in marketing, increasing adoption of subscription among men, busy and hectic lifestyles, etc. Majority of the customers purchasing goods online are influenced by the feedbacks given by other users on several social media platforms. Their decisions are also impacted by social media influencers and the reviews given by famous personalities about a particular product or service. Social media helps the companies in online marketing, thereby enabling them to establish a strong web presence. The rapidly growing use of social networking platforms by the people would provide a huge opportunity to the players in the subscription e-commerce industry to advertise about the subscription services provided by them, boosting the growth of global subscription e-commerce market in the upcoming years.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss

of life, business closures, closing down of factories and organizations, and shift to an online mode of work. Lockdown policies, imposed by the government to prevent the spread of virus led to the closure of local retail shops, malls and supermarkets, incentivizing consumers to shift towards online shopping and use of e-commerce websites for the purchase of essential items, increasing the demand for e-commerce services and boosting the growth of subscription e-commerce market. As a result of rising awareness about online shopping and a positive shift in people's attitude towards the use of subscription services, which were able to offer predictability and convenience in terms of availability and home delivery of essential items, the subscription e-commerce market would grow substantially. Therefore, the global impact of COVID-19 on subscription e-commerce market turned out to be positive.

Competitive Landscape:

The market for subscription e-commerce has been moderately fragmented due to the presence of large number of e-commerce platforms that operate in e-commerce subscription market. The key players of subscription e-commerce market are:

Amazon.com, Inc.

Unilever PLC (Dollar Shave Club)

Blue Apron Holdings, Inc.

Beauty For All Industries (IPSY)

HelloFresh SE

Netflix, Inc.

The Walt Disney Company

Femtec Health, Inc. (Birchbox, Inc.)

Peloton Interactive, Inc.

Stitch Fix, Inc.

Loot Crate, Inc.

FabFitFun, Inc.

Strategic partnerships and collaborations are the key strategies followed by the companies operating in the subscription e-commerce market as these collaborations enable companies to extend their market share and gain a competitive edge in the market. For instance, on December 15, 2022, Netflix, Inc. announced that the company teamed up with boAt to launch a first-of-its-kind 'Stream Edition' audio range in India. The product range would feature True Wireless Earbuds (TWS), Headphones (On-Ear), and a Wireless Neckband. With the noise cancelling feature, the limited-edition audio range would enable users to enjoy watching Netflix in an enhanced way, by blocking out the sounds that the user don't want to hear and focusing on those that the user do.

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