

This report looks at the following areas:

Even with the availability of digital calendars and diaries, consumers remain enthusiastic about physical versions, responding to innovative and fashionable styling and buying journals and personal organisers to help them manage their lives and emotions. Growth in consumer spending on greetings cards is being driven by heightened demand for single cards, particularly at Christmas.

Card shops remain popular, but face stiff competition as the supermarkets make strenuous efforts to create better non-food areas within their big-surface shops. The shift to buying online has begun to have an impact on stationery retailers, changing the economics of running a chain of shops. Expect more sales to migrate online in the next five years.

- · Online shopping for cards and stationery will grow
- Will shoppers for cards and stationery become more price-sensitive?
- Will supermarkets continue to grow market share of cards and stationery?



"The greetings card and personal stationery markets have held up, despite the tendency for so many forms of communication to be purely digital these days."

- Jane Westgarth, Senior **Retail Analyst**

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- What you need to know
- Products covered in this Report

EXECUTIVE SUMMARY

- The market
- Resilient market for greetings cards

Figure 1: Consumer spending on greetings cards, 2013-23

 Growth of the personal stationery market has been driven by style

Figure 2: Consumer spending on personal stationery, 2013-23

Single cards dominate the market

Figure 3: Consumer spending on greetings cards, by segment, estimates, 2018

- Companies and brands
- · Card Factory has an impressive track record
- 90% of card purchasers favour bricks-and-mortar shops
 Figure 4: Distribution of greetings card, by type of retailer,
 2018 (est)
- Mixed fortunes for stationery retailers

Figure 5: Distribution of personal stationery, by type of retailer, 2018 (est)

- The consumer
- · Birthdays are the biggest driver of card sales

Figure 6: Purchases of greetings cards, February 2019

74% think their greetings card shopping has stayed the same

Figure 7: Changes in shopping patterns for greetings cards, February 2019

People will always buy for family members

Figure 8: Recipients people would always buy cards for, February 2019

 Card shops and supermarkets are the most used types of retailer for greetings cards

Figure 9: Type of retailers used for buying greetings cards, February 2019

Card Factory has potential to increase share in London

Figure 10: Greetings card retailers used in the last 12 months, February 2019

· Card purchasing patterns shaped by convenience

Figure 11: Factors influencing choice of card retailer, February 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



16-24s are most inclined to buy personal stationery

Figure 12: Bought any personal stationery in the last year, by age, February 2019

- WH Smith is the most used retailer for personal stationery Figure 13: Retailers used for personal stationery in the last
- year, February 2019
 Stationery shoppers are price-sensitive

Figure 14: Factors influencing choice of retailer for personal stationery, February 2019

· What we think

ISSUES AND INSIGHTS

- Online shopping for cards and stationery will grow
- The facts
- The implications
- Will shoppers for cards and stationery become more pricesensitive?
- The facts
- The implications
- Will supermarkets continue to grow market share of cards and stationery?
- The facts
- The implications

THE MARKET - WHAT YOU NEED TO KNOW

- Greetings card market is resilient
- · The stationery market is driven by style
- Single cards account for more than 80% of spending
- Card shops capture almost 44% market share by value
- Print-on-demand reaches 7%
- Grocers benefit from convenience
- Population growth is slowing
- Internet use has grown rapidly
- Desktop and laptop computers favoured by online shoppers

MARKET SIZE AND FORECAST

- Resilient market for greetings cards
 Figure 15: Consumer spending on greetings cards, 2013–23
- Little growth expected between 2018 and 2023
 Figure 16: Consumer spending on greetings cards, at current and constant 2018 prices, 2013–23
- Growth of the personal stationery market has been driven by style

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 17: Consumer spending on personal stationery, 2013-23

Tough forecast conditions for stationery

Figure 18: Consumer spending on personal stationery, 2013-23

Forecast methodology

MARKET SEGMENTATION

- Cards are an individual thing
- Personalising cards

Figure 19: Consumer spending on greetings cards, by segment, 2018 (est)

Print-on-demand has shown strong growth

Figure 20: Consumer spending on greetings cards, 2013-18

· Christmas and Spring Season cards can add value

Figure 21: Single cards, share by value, 2018

· Personal stationery sales growth slows

CHANNELS TO MARKET

- Card shops capture almost 44% market share by value
- Print-on-demand operators improve share
- Grocers benefit from convenience
- · Life for independents
- Other retailers

Figure 22: Distribution of greetings cards, by channel, 2014-18 (est)

· Grocers grow share of personal stationery

Figure 23: Distribution of personal stationery, by channel, 2014-18 (est)

MARKET DRIVERS

Population growth is slowing

Figure 24: Population of the UK, 2013-23

Over-55s show highest rate of growth

Figure 25: Population of the UK, percentage change, by age band, 2013–23

30% of the population are over-55s

Figure 26: Age profile of the UK population, 2018

More than 90% of 16-64s use the internet

Figure 27: Internet used in the last 3 months, by age band, 2013 and 2018

Desktop and laptop computers favoured by online shoppers

Figure 28: Shopped online in the last three months, by device, September 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Plenty of occasions for greetings

Figure 29: Births, marriages and deaths, UK, 2013 and 2017

Welcome to your new home

Figure 30: UK housing transactions, 2014-18

· Welcome to your rented home

Figure 31: Time in current home, by tenure, November 2018

- · Graduations, driving tests and more
- Back-to-school stimulates stationery spending
- Seasonal purchases attract a large audience

COMPANIES AND BRANDS - WHAT YOU NEED TO KNOW

- · Card Factory is the largest greetings chain
- High growth for online sellers
- Rapid growth at Smiggle and The Works helped by new store openings and online growth
- Troubled retailers in greetings and stationery
- · Like-for-like sales growth is proving elusive
- WH Smith's retail mix is changing
- · Print-on-demand sellers grow share

COMPANIES AND BRANDS

- Broad sector with variety of retail formats
- Tough competition in the card market
- Star performances by online sellers, new entrants and The Works

Figure 32: Leading greetings cards and stationery retailer revenues, 2013-18

- · Changes of ownership and store closures
- Administration for Office Outlet
- WH Smith pulls the plug on Cardmarket
- Paperchase enters CVA

Figure 33: Leading greetings card and stationery retailers, store numbers, 2013-18

- · Crucial for retailers to grow store productivity
- Ryman's stores have achieved steady growth
- Sales per outlet fall at WH Smith as travel increases share of the business
- Paperchase's sales per outlet influenced by growth of online
- Card retailers see static sales per outlet
- Scribbler, Tiger and Smiggle grow store productivity

Figure 34: Leadings greetings card and stationery retailers, sales per store, 2013-18

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



MARKET SHARE

- Market share of greetings
- Card Factory edges ahead, as WH Smith and Clinton lose share
- · WH Smith's retail mix is changing
- Print-on-demand sellers grow share
- Paperchase has held market share
- Cards Galore and Scribbler mark time, while Smiggle grows

Figure 35: Greetings cards market share, by value, 2013-18

- Market share of personal stationery
- · WH Smith is the leading retailer for personal stationery
- Office Outlet has lost share
- The Works grows strongly
- · Smiggle has strong appeal to kids

Figure 36: Personal stationery market share, by value, 2013-18

· Pen Shop is the largest pen specialist chain

COMPETITIVE STRATEGIES

WH Smith trialling new store concepts

Figure 37: WH Smith, high street shop, 2019

· Card Factory has grown through new store openings

Figure 38: Card Factory shop, 2019

- Paperchase launches CVA with a view to cost savings and closures
- Clinton Cards all fully rebranded

Figure 39: Clintons, typical shop, 2019

 Moonpig rebranded to be less gimmicky and emphasise its personal touch

Figure 40: Moonpig, new identity, 2017

LAUNCH ACTIVITY AND INNOVATION

Paper planners continue to be relevant

Figure 41: Perfect Planner Diary Accessories, Busy B, 2019

Journaling stationery increasingly popular

Figure 42: Journal, by allsorteduk.com, 2019

· Overlapping styling between cards and stationery

Figure 43: Example of modern calligraphy, 2019

Redesigning everyday pens

Figure 44: bLen pen, Zebra, 2019

WH Smith injects more style

Figure 45: WH Smith, stationery collections, 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



ADVERTISING AND MARKETING ACTIVITY

- · Relatively small adspend for the sector
- · Advertising spend falls by a third in 2018

Figure 46: Total above-the-line, online display and direct mail advertising expenditure on greetings cards and stationery, 2014-18

WH Smith accounts for more than 20% of spending

Figure 47: Above-the-line, online display and direct mail advertising expenditure on greetings cards and stationery, selected retailers, 2014-18

59% of spend is on television

Figure 48: Above-the-line, online display and direct mail advertising expenditure on greetings cards and stationery, by media type, 2018

Advertising specifics

Figure 49: Moonpig, television advert (still) for Mother's Day, 2010

Nielsen Ad Intel coverage

BRAND RESEARCH

Brand map

Figure 50: Attitudes towards and usage of selected brands, April 2019

Key brand metrics

Figure 51: Key metrics for selected brands, April 2019

Brand attitudes: Card Factory stands out for good value
 Figure 52: Attitudes, by brand, April 2019

Brand personality: Scribbler and Paperchase are fun brands
 Figure 53: Brand personality – macro image, April 2019

Card Factory has a basic image

Figure 54: Brand personality – micro image, April 2019

- Brand analysis
- Card Factory is an outstanding brand with broad appeal

Figure 55: User profile of Card Factory, April 2019

- Brand analysis
- Paperchase is stylish, fun and worth paying more for

Figure 56: User profile of Paperchase, April 2019

- Brand analysis
- · Scribbler is fun and innovative

Figure 57: User profile of Scribbler, April 2019

- Brand analysis
- WH Smith is widely known, trustworthy and offers good value for money

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 58: User profile of WH Smith, April 2019

- Brand analysis
- Hallmark enjoys high levels of awareness
 Figure 59: User profile of Hallmark, April 2019
- Brand analysis
- Clintons is fairly well trusted but lacks differentiation Figure 60: User profile of Clintons, April 2019
- Brand analysis

THE CONSUMER - WHAT YOU NEED TO KNOW

- Birthdays are the biggest driver of card sales
- 74% think their greetings card shopping has stayed the same
- Family members are always remembered with greetings cards
- Card shops and supermarkets are the most used types of retailer for greetings cards
- · Card Factory has more potential in the London area
- Card purchasing patterns shaped by convenience
- 16-24s are most inclined to buy personal stationery
- WH Smith is the most used retailer for personal stationery
- · Stationery shoppers are price-sensitive

GREETINGS CARD PURCHASES

- Birthdays are the biggest driver of card sales
 Figure 61: Purchases of greetings cards, February 2019
- Broad spread of card shoppers
 Figure 62: Purchases of greetings cards, repertoire of occasions, February 2019
- Those buying for fewer occasions tend to be younger
 Figure 63: Purchases of greetings cards, repertoire of occasions, by occasion, February 2019

CHANGES IN SHOPPING PATTERNS FOR GREETINGS CARDS

- 74% buy about the same number of greetings cards as a year ago
- Older shoppers are set in their ways
- Cards are not essential to those in financial difficulties
 Figure 64: Changes in shopping patterns for greetings cards,
 February 2019

RECIPIENTS PEOPLE WOULD ALWAYS BUY CARDS FOR

- People will always buy for family members
- · Cards for friends a more feminine thing

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 65: Recipients people would always buy cards for, February 2019

TYPE OF RETAILER USED FOR BUYING GREETINGS CARDS

- Card shops and supermarkets are the most used types of retailer for greetings cards
- Online sellers popular with Millennials
- Gift shops attract 16-24s
- Families with children most inclined to buy at supermarkets

Figure 66: Type of retailers used for buying greetings cards, February 2019

41% of card shoppers use one type of retailer

Figure 67: Type of retailers used for buying greetings cards, repertoire, February 2019

Card shops are a destination for greetings

Figure 68: Type of retailers used for buying greetings cards, February 2019

GREETINGS CARD RETAILERS USED IN THE LAST 12 MONTHS

- · Card Factory is weakest in the London area
- Upscale bias to Clintons shoppers
- Independents capture 16%
- 24% of 25-34s used Moonpig
- Paperchase most used by 16-34s
- WH Smith is popular for greetings cards

Figure 69: Greetings card retailers used in the last 12 months, February 2019

FACTORS INFLUENCING CHOICE OF CARD RETAILER

- Price and convenience shape shopping choices
- Older shoppers rate convenience more highly
- Men appear more interested in humorous cards
- 16-24s like to personalise card designs
- · Older and more affluent shoppers like to support charities

Figure 70: Factors influencing choice of card retailer, February 2019

RETAILERS USED FOR PERSONAL STATIONERY

16-24s are most inclined to buy personal stationery
 Figure 71: Bought any personal stationery in the last year, by age, February 2019

- Supermarkets lead the way
- WH Smith is a powerful player
- · Rise of the discounters

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- Amazon has a major position in stationery
- Ryman appeals to male shoppers
- Paperchase captures a young, affluent shopper group
 Figure 72: Retailers used for personal stationery in the last year, February 2019
- Little breadth of shopping habits for personal stationery
 Figure 73: Repertoire of retailers used for personal stationery
 in the last year, February 2019
- 14% just used one retailer for personal stationery
 Figure 74: Retailers used for personal stationery in the last year, by repertoire of retailers used, February 2019

FACTORS INFLUENCING CHOICE OF RETAILER FOR PERSONAL STATIONERY

- 35-54s are concerned about price
- Fashionable or classic styling?
- Online shopping has wide appeal
- Power of brands
- · Older shoppers choose stationery as gifts
- Child appeal is a key driving force
- Personalising has two key audiences

Figure 75: Factors influencing choice of retailer for personal stationery, February 2019

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Consumer research methodology

APPENDIX - MARKET SIZE AND FORECAST

Forecast methodology

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.