



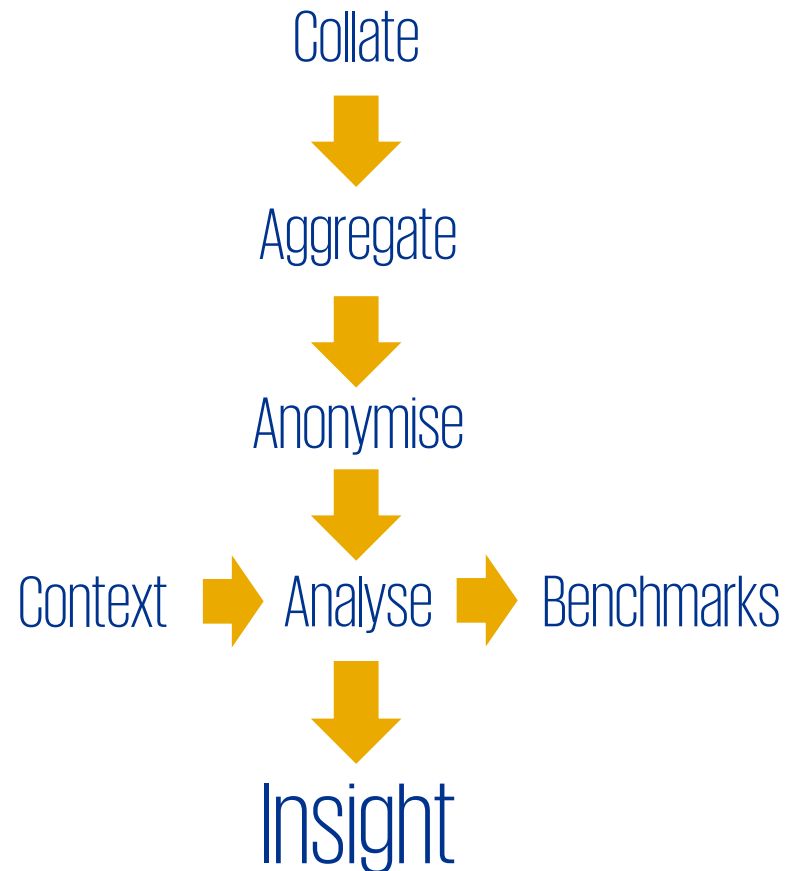
H2 2019 Gift Card and Voucher Performance

Pete Edmonds

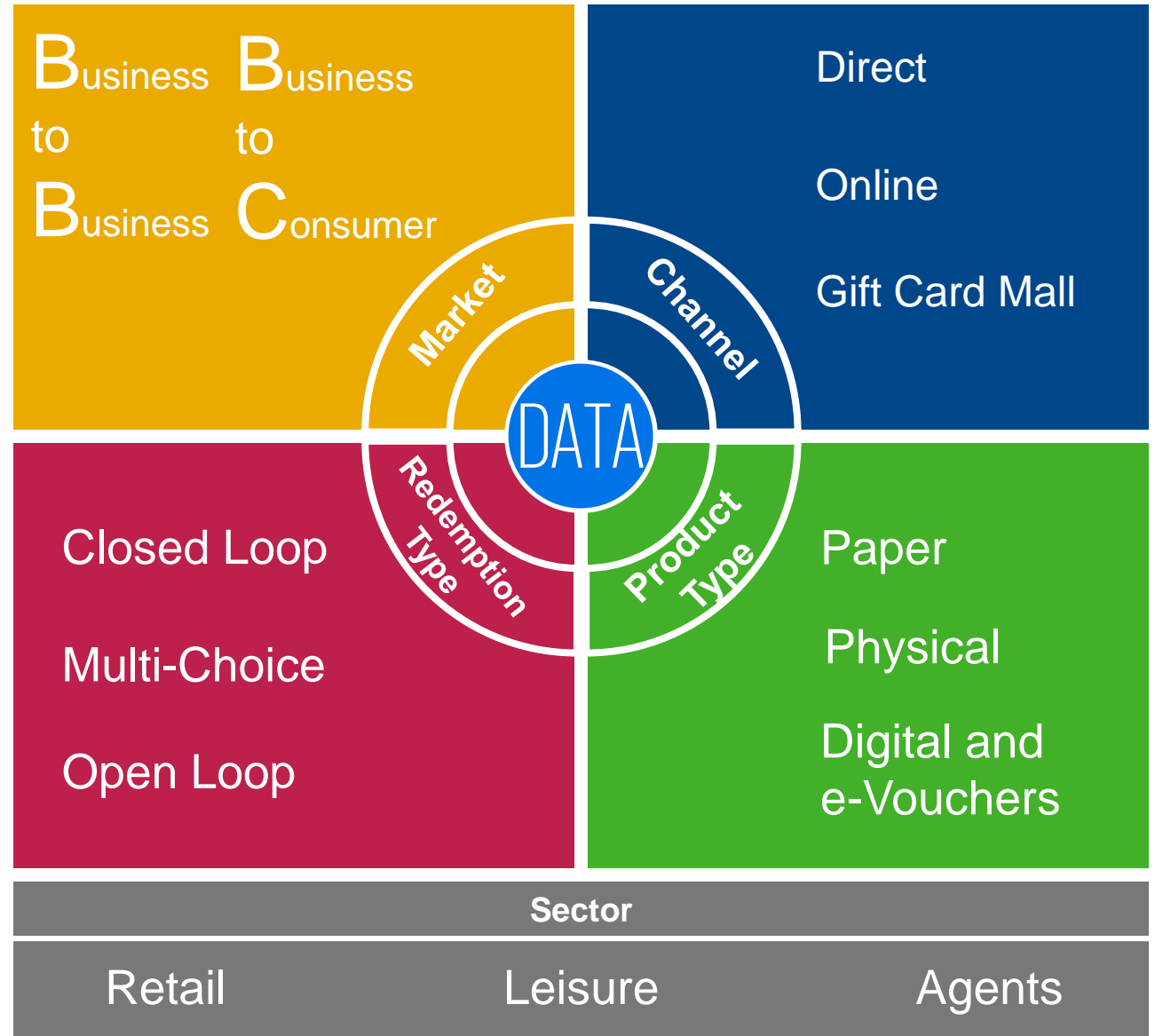
Data and Analytics, KPMG

Working together to assess industry performance

31 Contributors




We look at the data through different lenses




Overall Trends

0.9%
Like-for-like period growth

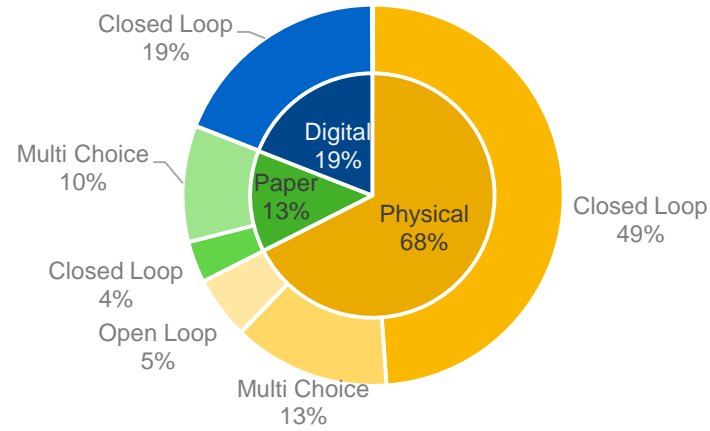


1.7% Rolling Year growth

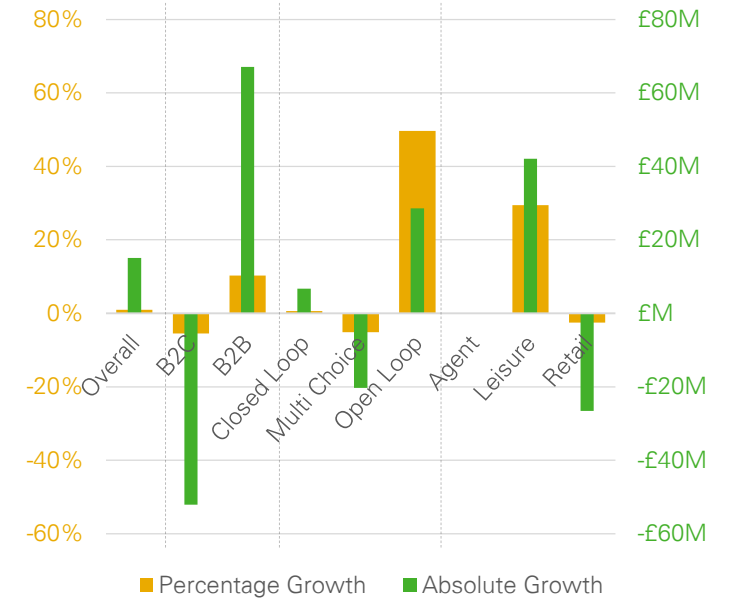
£1,612.4m
Total H2 2019 sales



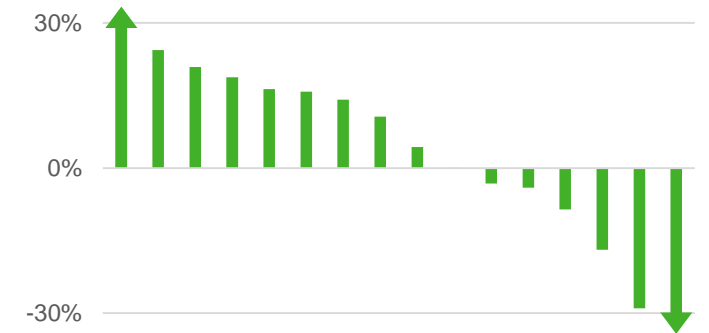
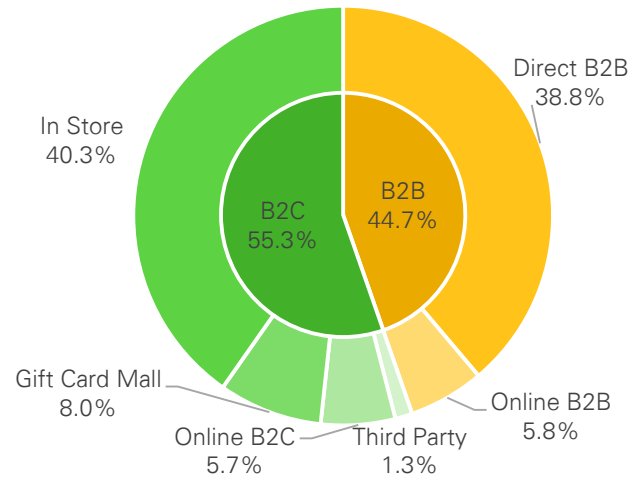
Market Share of Products and Redemption Types in H2 2019



Percentage vs. absolute growth in the like-for-like period H2 2018 – H2 2019

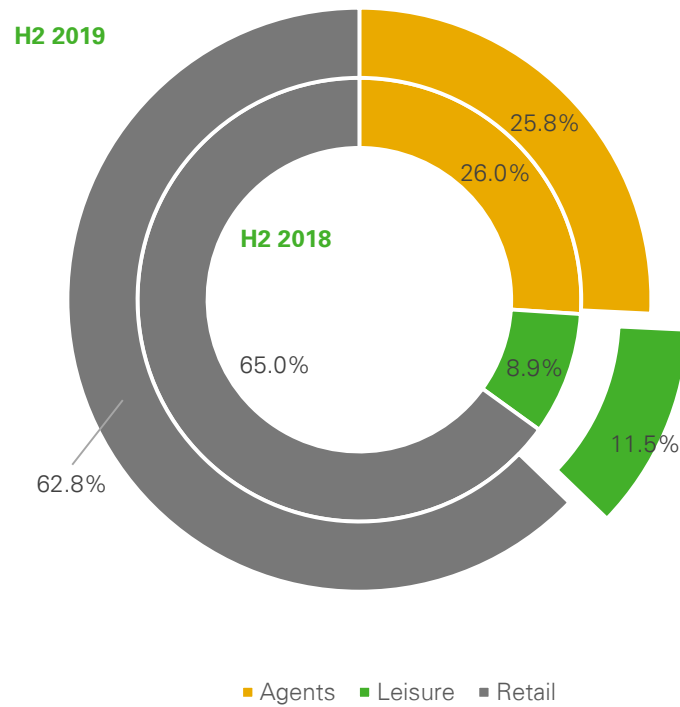


Market share by sales channel

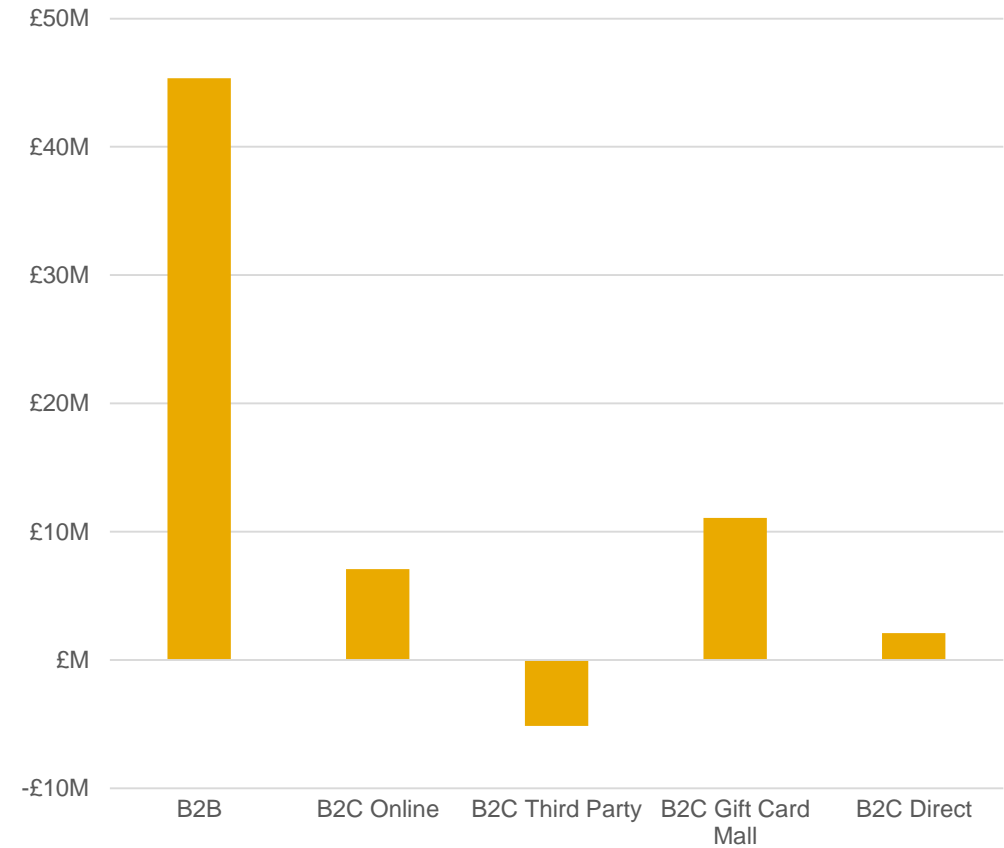


Leisure Focus

Market Share

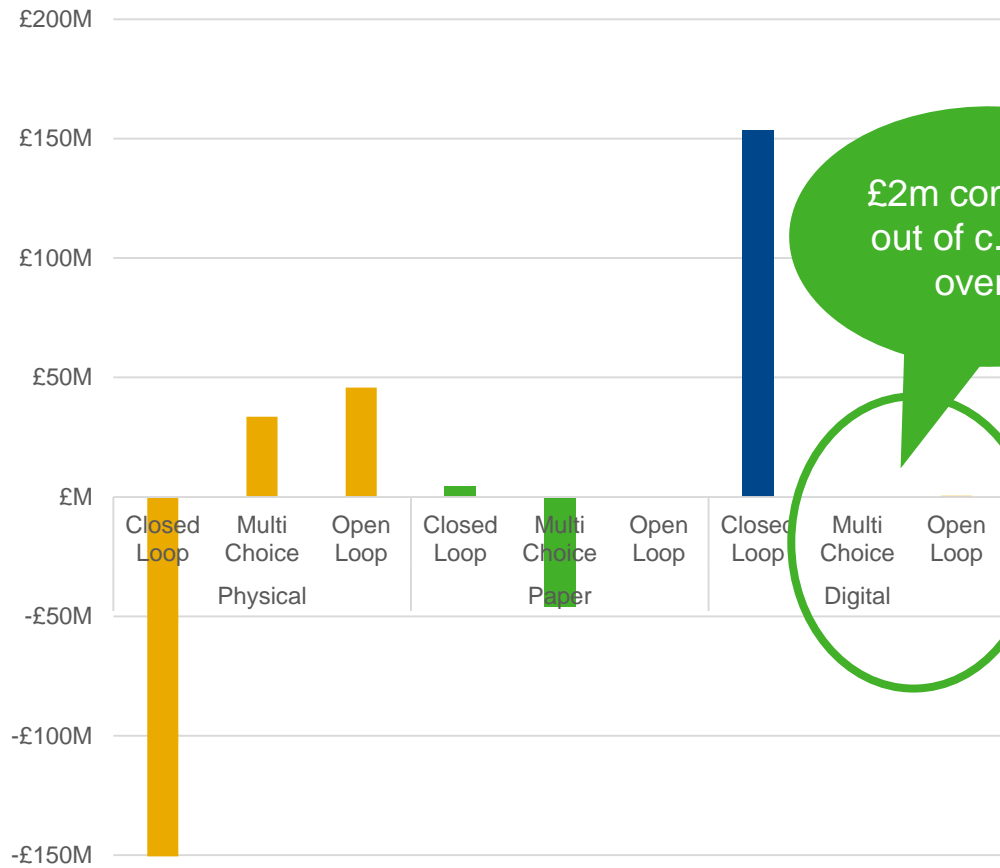


Channel Growth within Leisure



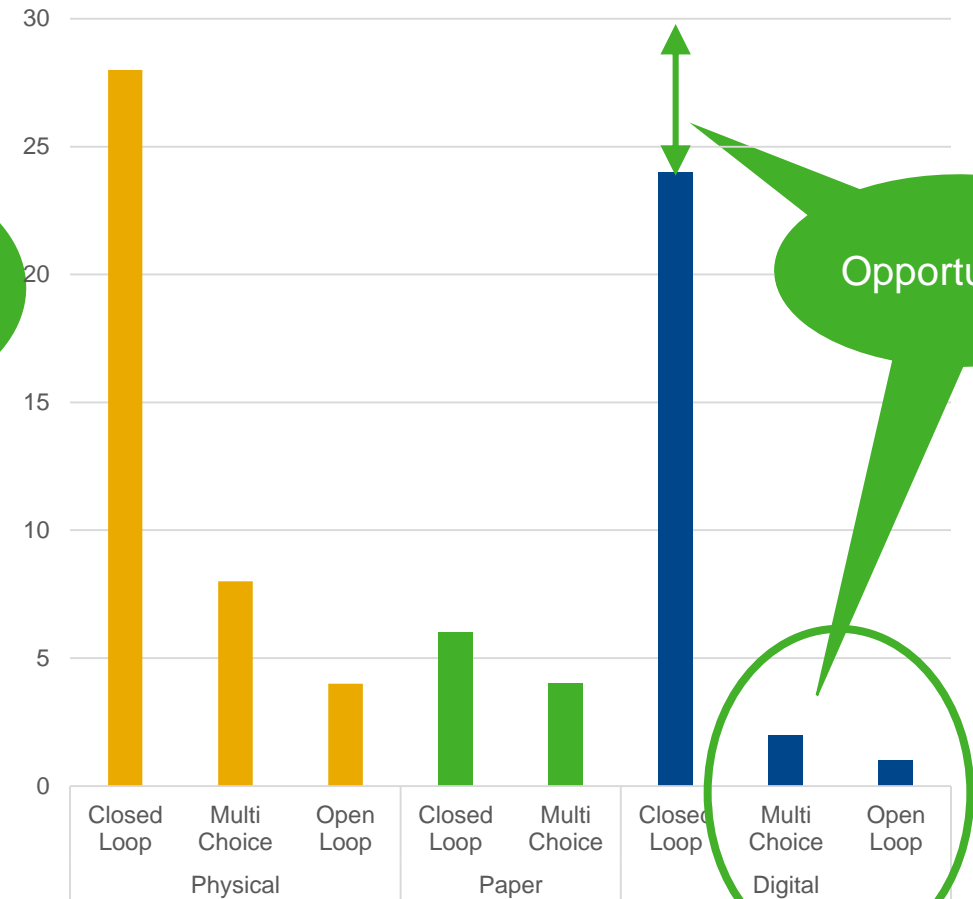
Product Mix

Rolling year growth by Product and Redemption Type



£2m combined out of c. £2.5b overall

Number of Members reporting sales



Opportunity?



Conclusion

- Gift Cards and Vouchers are increasingly relevant
- Online and Gift Card Mall sales channels continue to grow in importance
- Retail performance is polarised
- Leisure, B2B and Digital are growth engines
- Digital choice options are under-represented

Pete Edmonds

Data and Analytics, KPMG