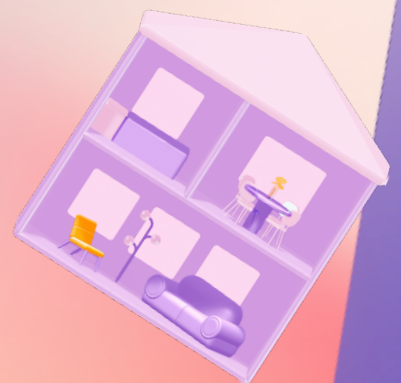


Gift card market figures  
in 2024

# Games, Toys & Childcare



# Gift card service for consumers



## Gift Card

Montant moyen

€ 98

## Expired gift cards\*\*

€36 average amount left on an expired gift card

21% of gift cards expired

## Share of gift card purchases

75% of physicals gift cards

25% of e-cards

## Top 3 gift card amounts sold

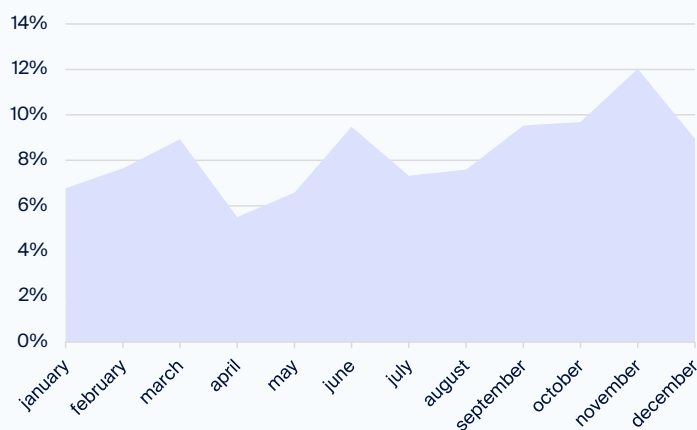
€50

€100

€150

Gift cards amount goes from €20 to €1000

## Evolution of gift card sales over the year, in volume



21% of sales occur at Christmas

Peak sales between December 20 and 24

20% of sales take place during back-to-school season

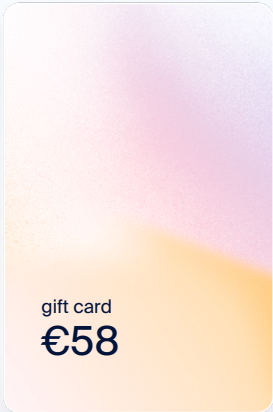
Gift cards distributed in marketing campaigns have an average value of €138

\* A top-up payment is the difference between the amount in the shopping cart and the amount on the gift card

\*\* Expired gift cards include gift cards with all or part of the amount remaining at the time of expiry.

# Reselling network/ distribution

## Average amount on the network



## Face value of the most distributed gift cards



## Top 3 discounts

- 10% of discount
- 18% of discount
- 9% of discount



Average discount  
14%

# Reselling network/ distribution

## Breakdown of sales by type distributors - on average

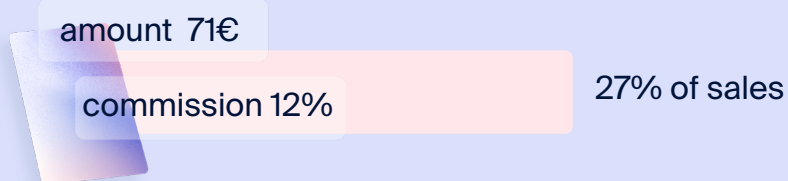
### Employee Incentive - Company funded

*The gift card is a reward offered by the company to its employees, funded by the company, and accessible only to those who are affiliated with it.*



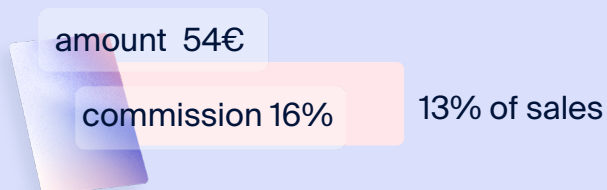
### Loyalty Program - Non-Company funded

*The gift card is a reward in a loyalty program, where members must partially or fully purchase the card, accessible only to them.*



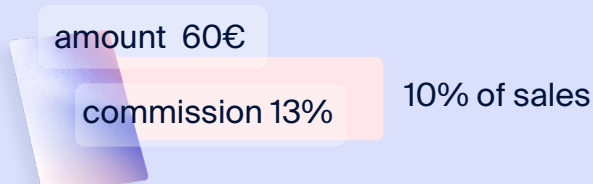
### Multiple

*The gift card can be used in various types of programs.*



### Employee Incentive - Non-Company funded (benefit)

*The gift card is a reward for employees of a company, who must partially or fully purchase the card, accessible only to those within the company offering the reward.*



# Reselling network/ distribution

## Breakdown of sales by type distributors - on average

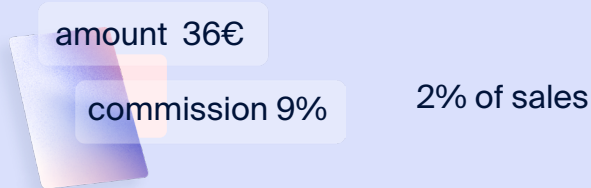
### Loyalty Program - Company funded

*The gift card is a reward in a loyalty program, exchanged for points, miles, or a similar currency, accessible only to program members.*



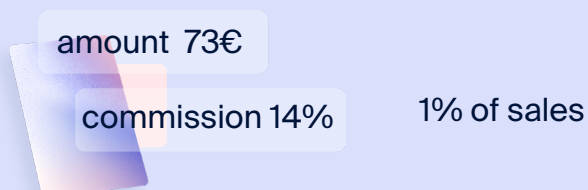
### Multi-Branded Gift Card conversion

*The gift card allows exchanging a multi-brand card for a partner's gift card, partially or fully through a platform.*



### E-tail ou Marketplace

*The gift card is available on an open platform, allowing customers to purchase freely in exchange for payment, without the need for an identifier or restrictive information.*



# Buybox insights

## Market dynamics and outlook for gift cards in the toys, games, and childcare sector in 2024

The gift card market in the toys, games, and childcare sector is evolving within a rapidly changing landscape in 2024, shaped by a declining birth rate (at its lowest since 1946) and growing pressure from the second-hand market. In response to these shifts, retailers must redefine their approach to maintain attractiveness and capture an increasingly volatile demand.

In this context, gift cards emerge as a strategic tool, enabling brands to adapt to new consumer habits, strengthen customer engagement, and secure sales during key periods.

### Consumer trends and market seasonality

The average gift card value remains stable at €98, highlighting the sector's resilience despite economic pressures.

A notable characteristic of this market is the strong preference for physical gift cards, which account for 75% of sales. This trend is driven by:

- The emotional significance of gifts for children, where a tangible format is preferred.
- The central role of family events (births, birthdays, holidays), reinforcing the need for a physical gifting experience.

Seasonality is a crucial factor, with two major consumption peaks:

- Black Friday (28% of November sales), as consumers anticipate year-end gift shopping.
- Back-to-school season (20% of sales in August-September), a key period for educational and developmental products.



# Buybox insights

As parents adopt a more rational approach to spending, these peak periods become essential for brands looking to maximize the impact of their gift card programs.

## Transaction value pressure and distribution challenges

The third-party partner segment has experienced a decline in distributed gift card values, dropping from €100 in 2023 to €58 in 2024. This trend reflects:

- A shift towards smaller purchases, with standardized face values (€50 and €20) becoming dominant.
- Increased distributor pressure on profitability, with relatively high commission rates (averaging 14%).

To counter these challenges, retailers must adjust their distribution strategies to optimize margin management and maintain competitive pricing.

However, two key B2B segments present significant opportunities:

- Employer-funded reward programs (45% of B2B transactions), directly targeting parents through HR policies and employee benefits. These programs serve as a powerful loyalty and engagement tool.
- Non-corporate-funded loyalty programs (27% of B2B transactions), offering higher face values (€70) and more attractive commissions (averaging 12%).

For retailers, the challenge lies in optimizing these channels—balancing volume and profitability to maximize brand presence while protecting margins.

# Buybox insights

## Adaptation strategies and growth levers

Amid market shifts—including inflation, declining purchasing power, the rise of e-commerce, and increased second-hand competition—gift cards are emerging as a key tool to streamline the shopping experience and secure demand.

To maximize their impact, retailers should structure their approach around three key priorities:

### 1. Strengthening digital and omnichannel offerings

- Accelerate the shift to e-gift cards to meet the expectations of new generations of parents.
- Seamlessly integrate gift cards into digital ecosystems and mobile payment solutions.

### 2. Optimizing margin management and commissions on indirect channels

- Negotiate better terms with third-party distributors to offset high commission rates.
- Diversify distribution models (e.g., B2B incentives, employee benefits) to balance volume and profitability.

### 3. Boosting conversion and gift card usage

- Encourage faster activation through reminders and targeted promotional offers.
- Increase complementary spending, by integrating gift cards into loyalty programs and bundled promotions.

By leveraging these strategic initiatives, toys, games, and childcare retailers can strengthen resilience, attract new customer segments, and enhance profitability in an evolving market.