

SVS Global Market View

Ben Jones – Vice President Business Development & Partnerships

March 6th 2024 – London

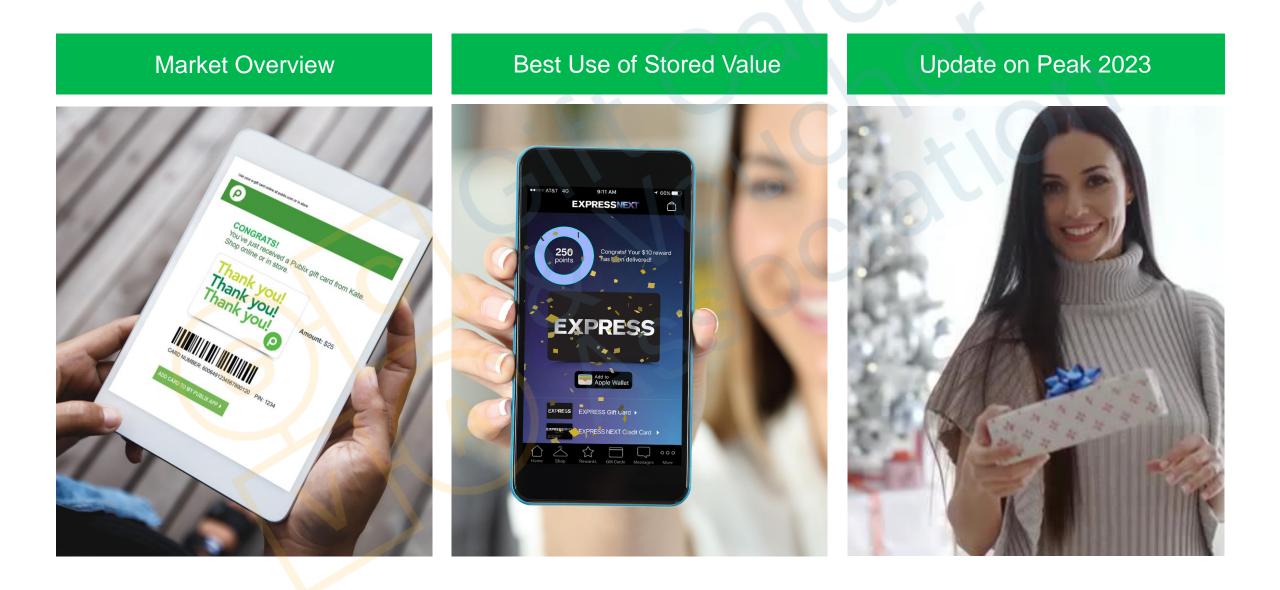
Agenda



- 1 2023 & Peak Overview
- 2 Growth in Digital & Ingenuity
- 3 Winning in Gift Cards What Does Good Look Like?
- 4 Merging of the Physical & Digital World
- 5 Let's Not Forget Physical 🙂
- 6 Summary

2023 & Peak Overview



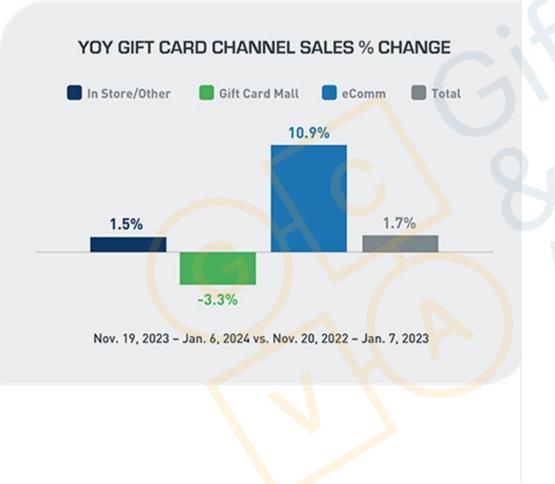


SVS Portfolio Performance Gift Card Sales Trends Q3 2023 vs 2022



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Key Takeaways for 2023 Peak Season

Shopping Extravagansas Online & In-store:Online retail sales increased +6.3% YoYIn-store sales were up a more modest +2.2% YoY.Shopping in-store still makes up a considerably larger portion of total retail spending.1

Online Shopping Continued to Grow:

2023 proved consumers aren't willing to give up the convenience of online shopping, The (NRF) and CNBC's Retail Monitor, reported that November online holiday spending outpaced in-store sales growth.

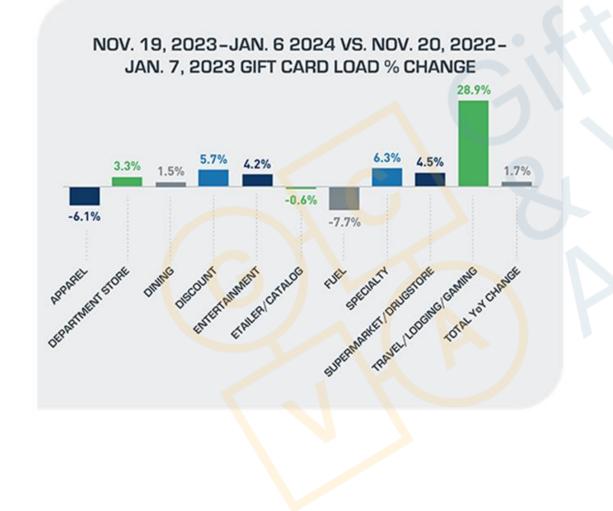
Holiday Shopping Season Extended:

Retailers started promotions early, giving consumers time to hunt for the deals & promotions. This early push combined with a full 31 days between Thanksgiving & Christmas Day made for a long shopping season.

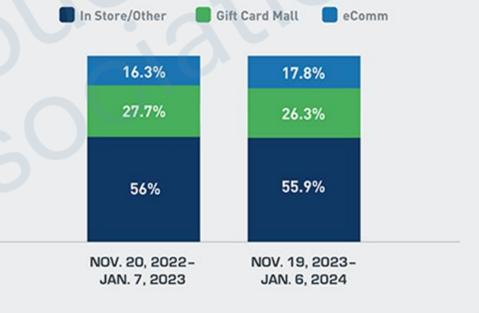
Season's Eatings:

Culinary celebrations continued. The Restaurant sector was up +7.8% YoY, while Grocery was up +2.1% for the season.¹



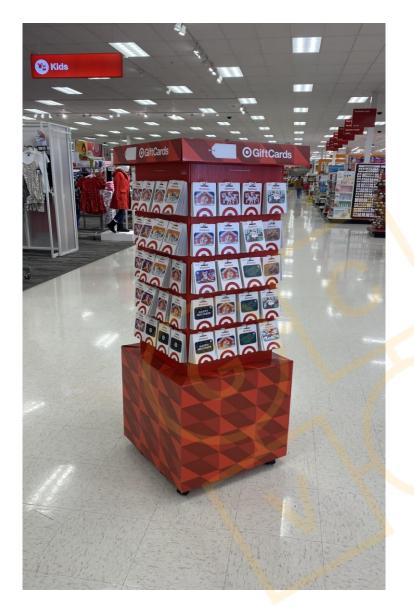


GIFT CARD SALES BY CHANNEL DISTRIBUTION



Market Examples for Consideration – Target



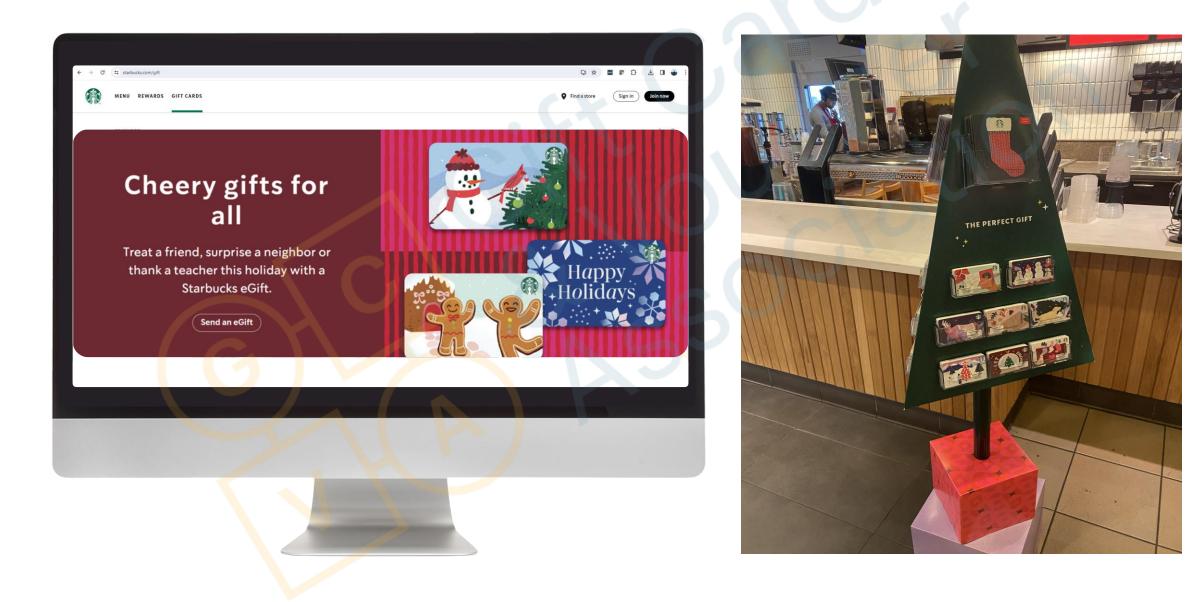






Market Examples for Consideration – Starbucks





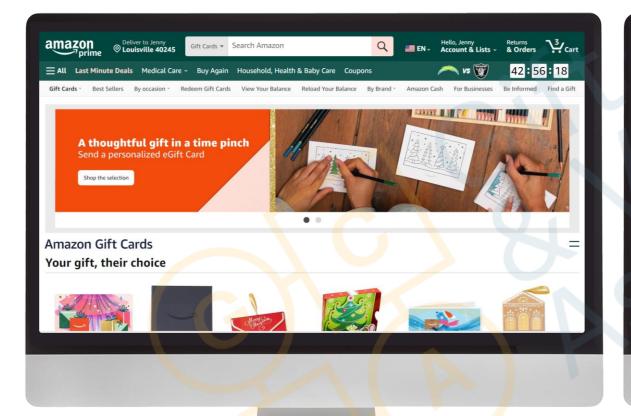
Specialty Packages – Starbucks

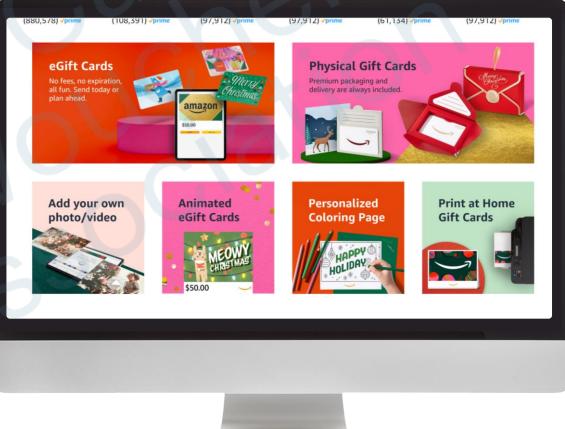




Market Examples for Consideration – Amazon







Limited Edition Gift Card Holder (\$50 Minimum Load) – Amazon





Ecommerce Promotion Holiday 2023 – H&M 💥

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Campaign Driven Across All

Communication Channels.

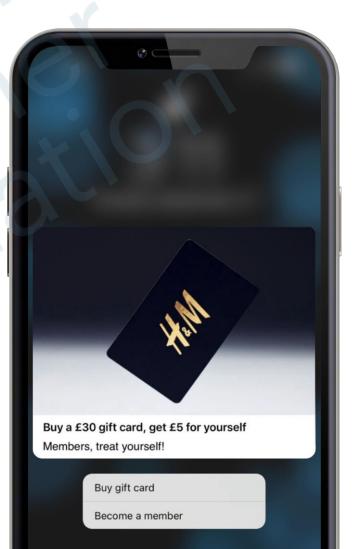
- Marketing notification sent to all app users with link to gift card site halfway through promotion window
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Website Banner

Email campaign as well to members

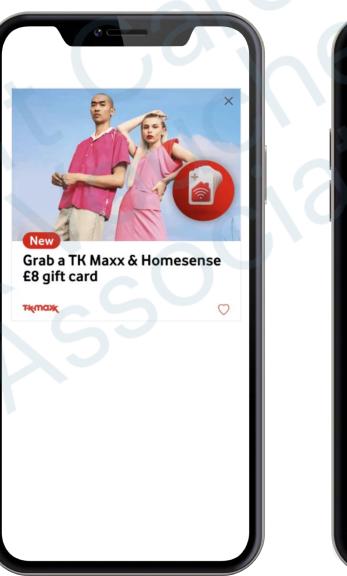




Instore and Digital Merchandising & B2B Focus – TK Maxx



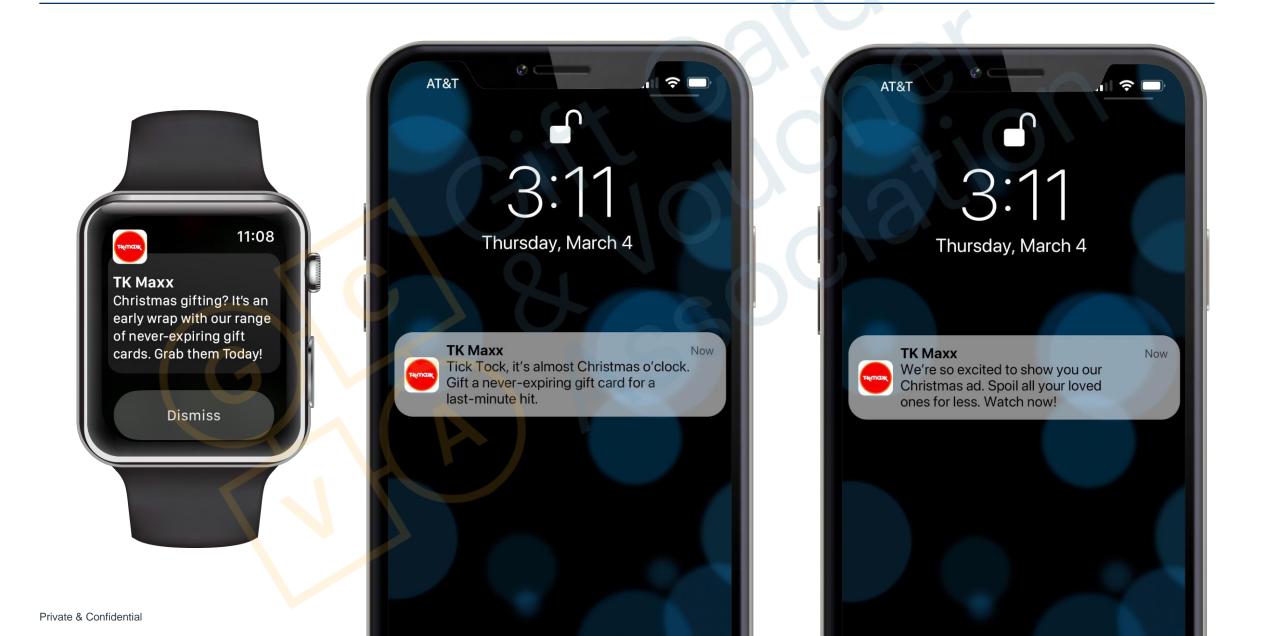






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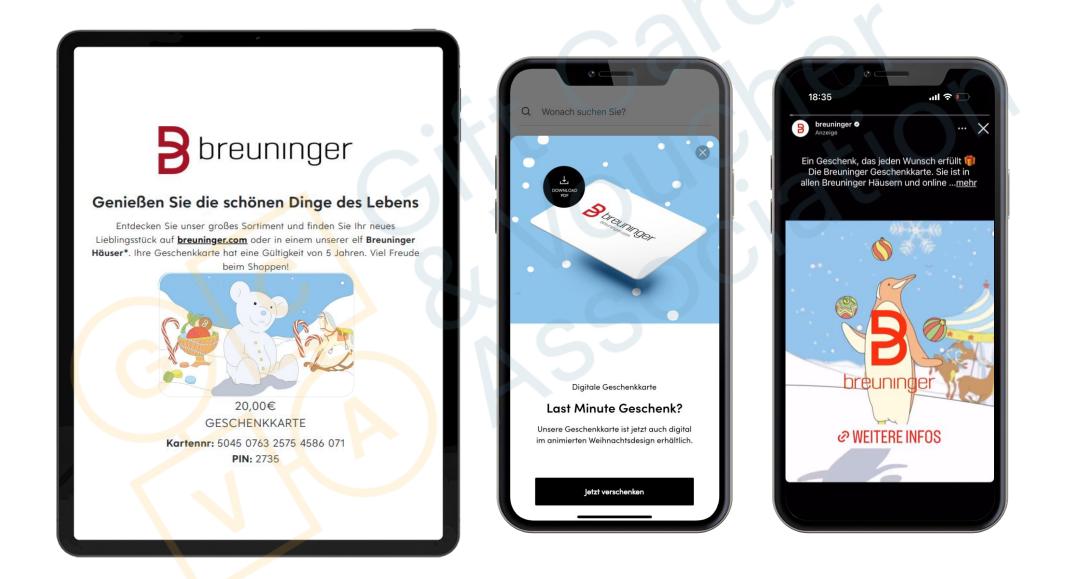
Instore and Digital Merchandising and B2B Focus – TK Maxx 🌺



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Christmas 2023 Marketing Campaign – Breuninger









Puma Oceania

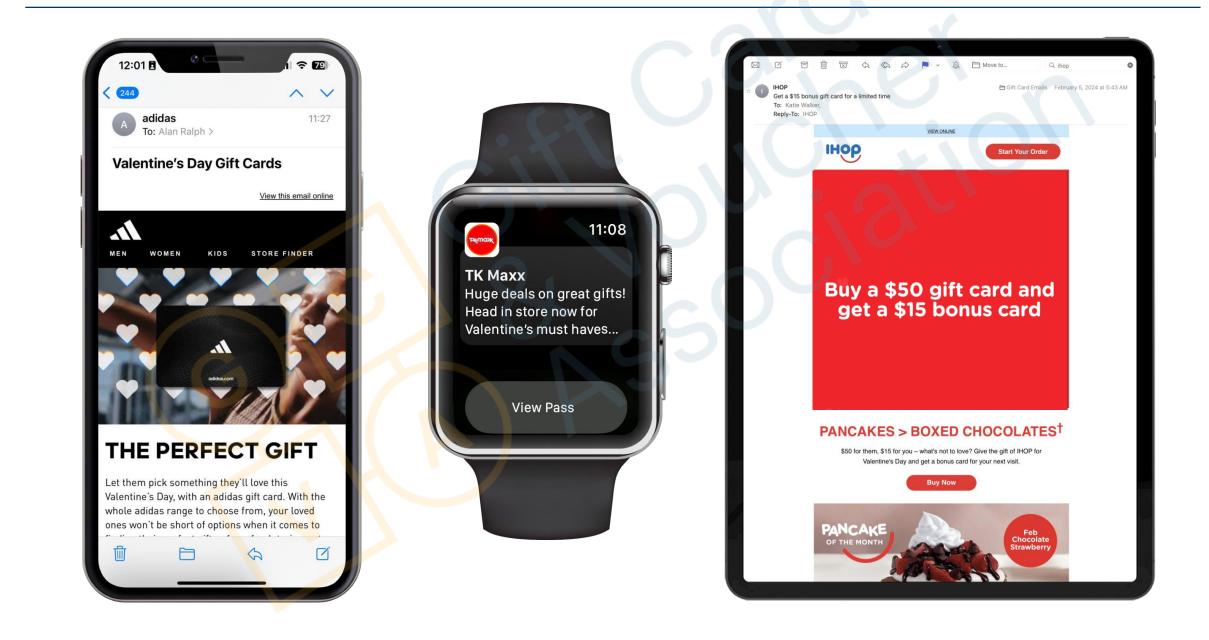
Puma negotiated a deal with RT Health, a local insurance company. If customers sign with RT Health, they receive a PUMA Gift Card.

Hofer

Get a 10€ Gift card if you spend more than 50€. Get a 20€ Gift Card if you spend more than 100€.

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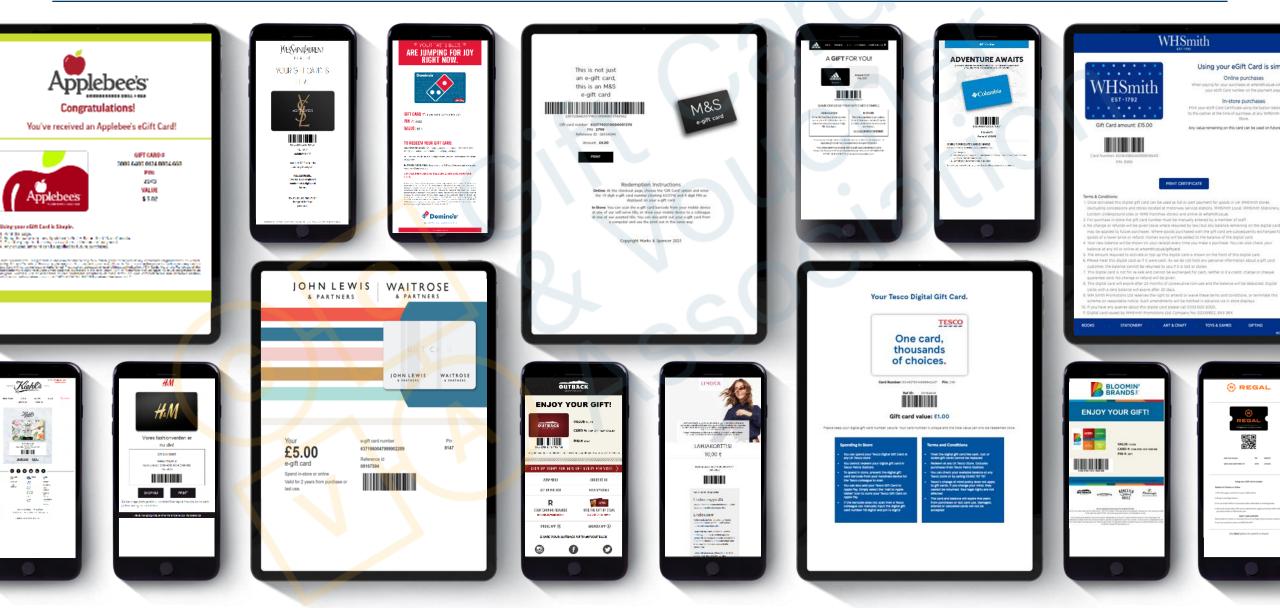
Valentine's Day – Adidas and TK Maxx. 💥 and IHOP 🌉



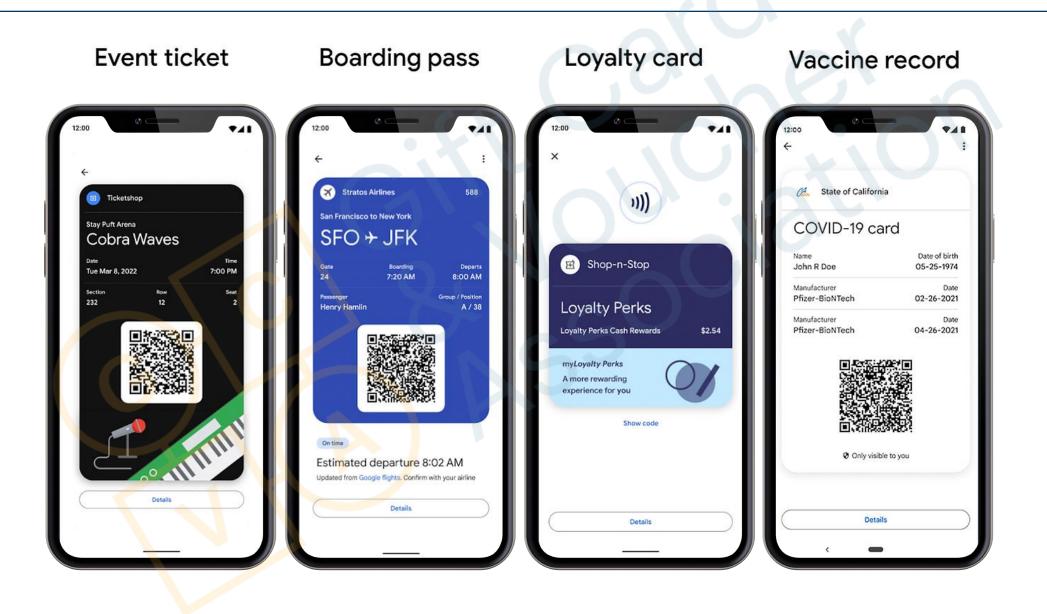
Growth in Digital & Ingenuity

Rise of Digital





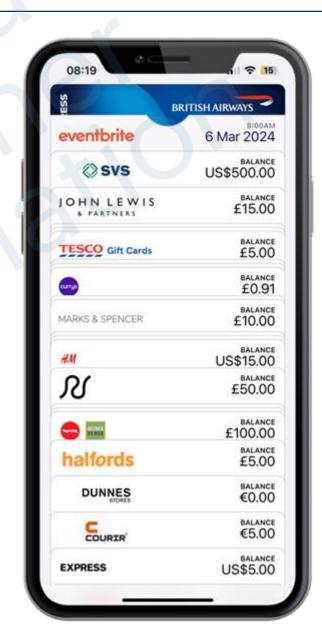
Rise of Digital



Rise of Digital 💥

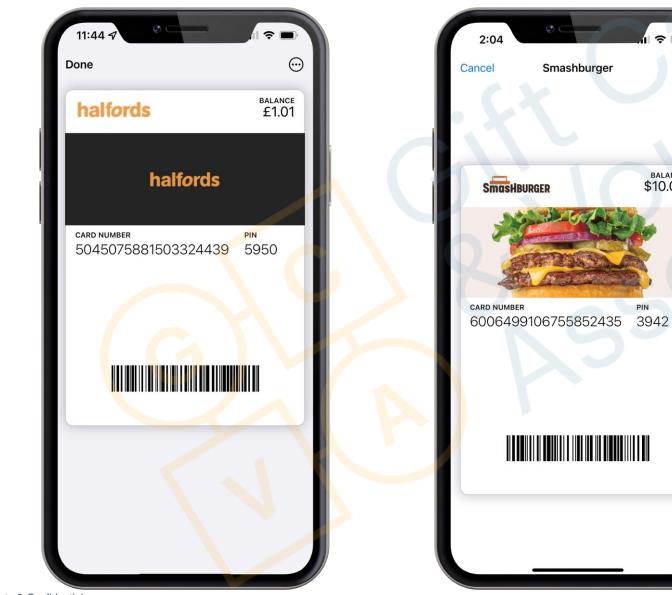


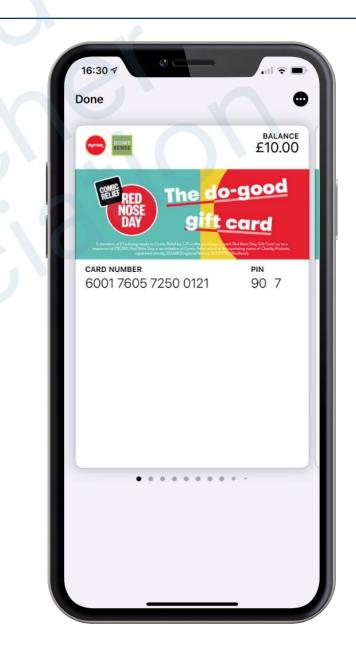
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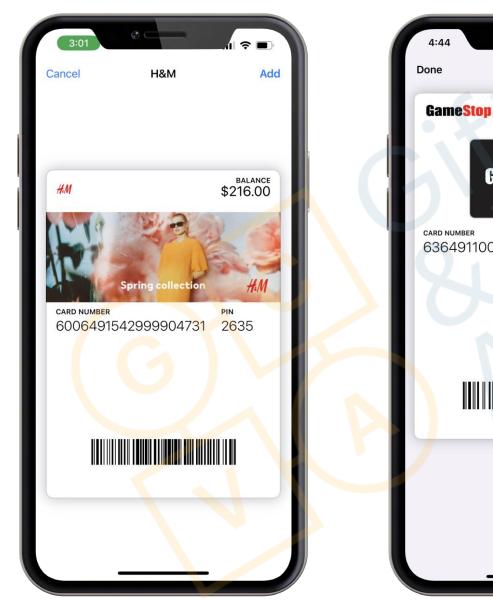
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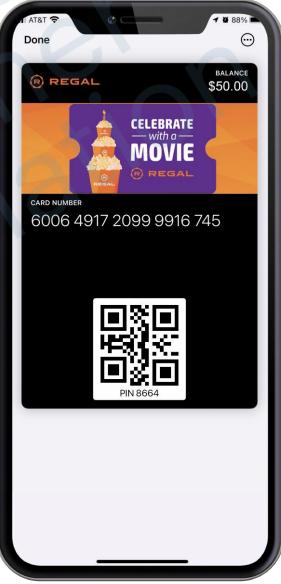
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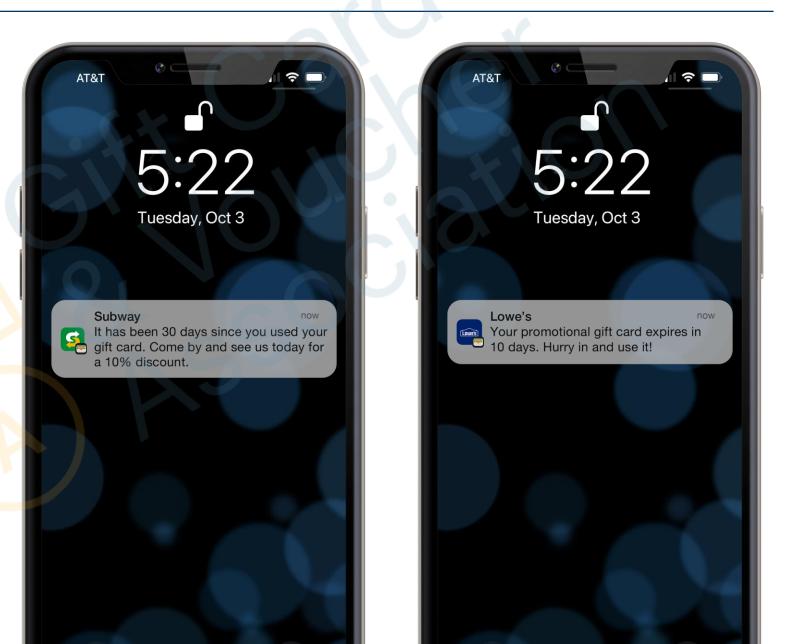




What's next? Marketing Notifications







Marketing Notifications 😹 and 🜉

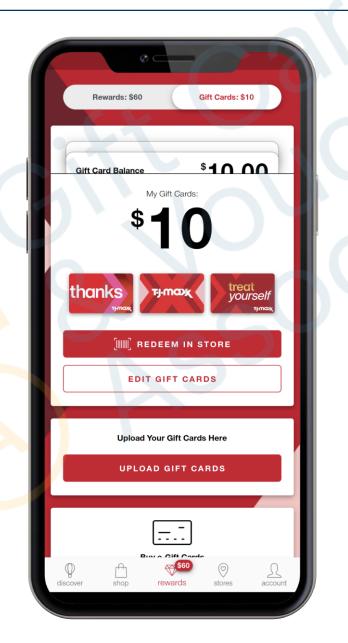


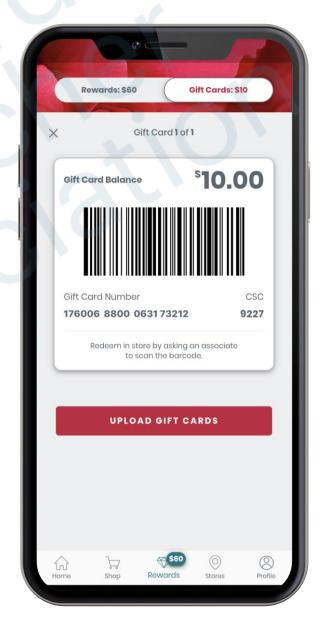
Winning in Gift Cards: What Does Good Look Like?

Loyalty – Creating and Rewarding









Private & Confidential

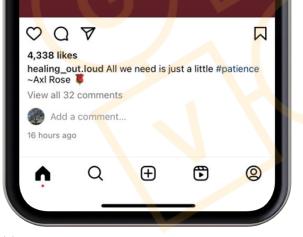
What about Dynamic Balances?

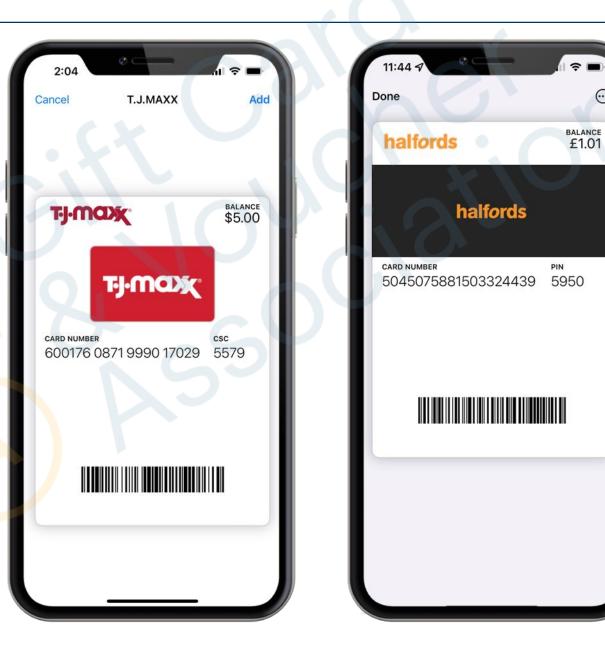


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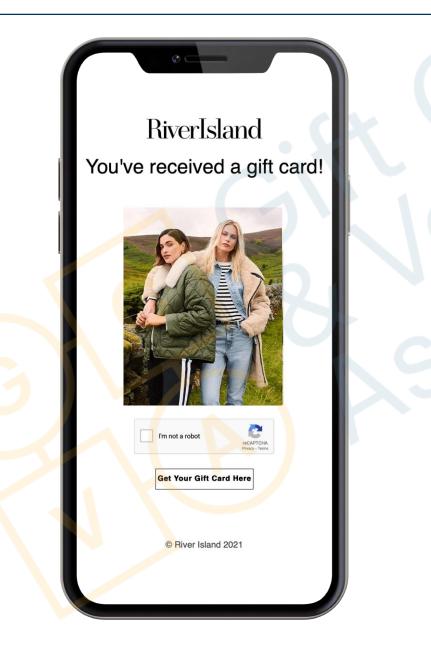
My patience is basically like a gift card. Not sure how much is left on it but we can give it a try.





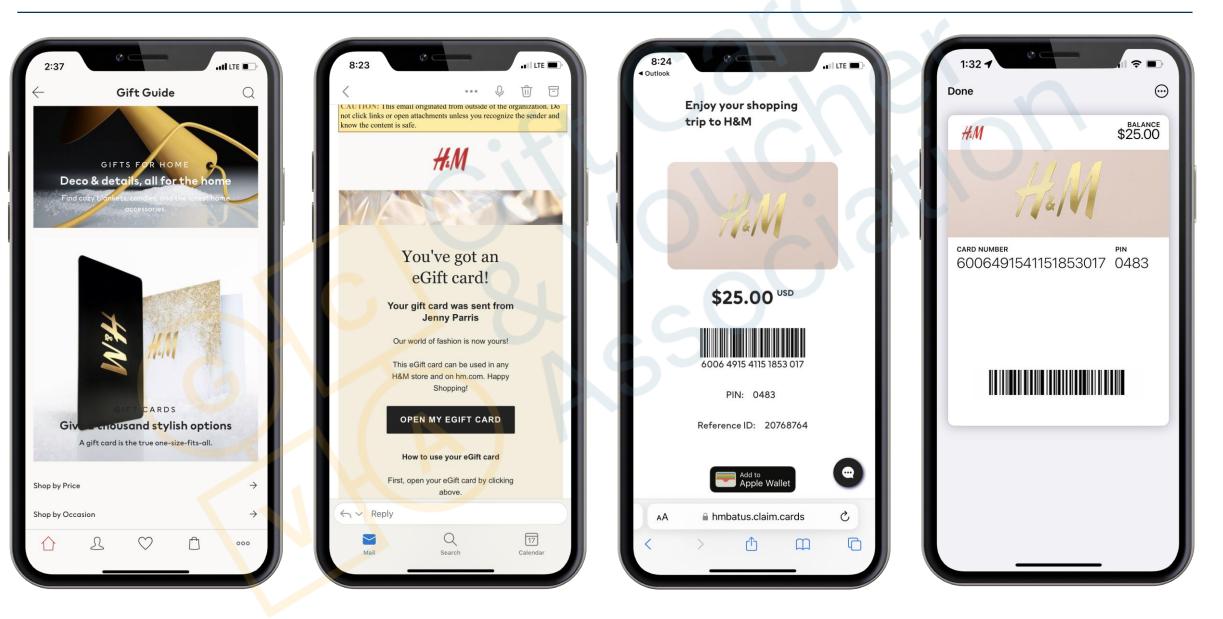
Animation & Mobile Wallet Services





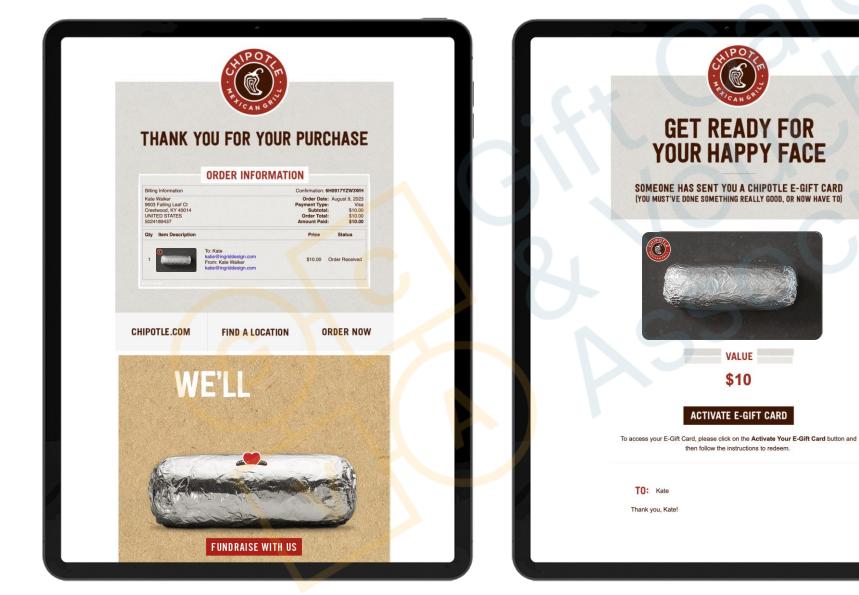
RiverIsland The best things in life are gift cards. Happy Shopping!	
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6338704664903561 Amount: £50.00 PIN: 9887 Reference ID: 00621319	
Add to Google Wallet Print Cerms and Conditions Gift Cards are redeemable online at riverisland.com and in all River Island stores in the UK (excluding Selfridges and Voisins), Republic of Ireland and	

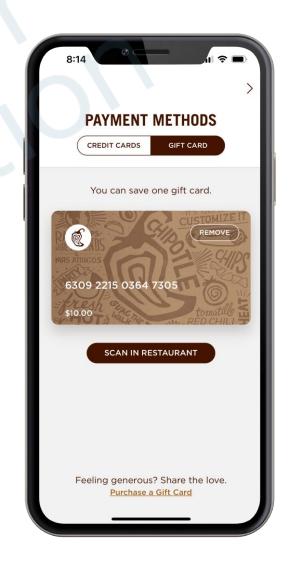
Delivery of Product



Delivery of Product – room for improvement?

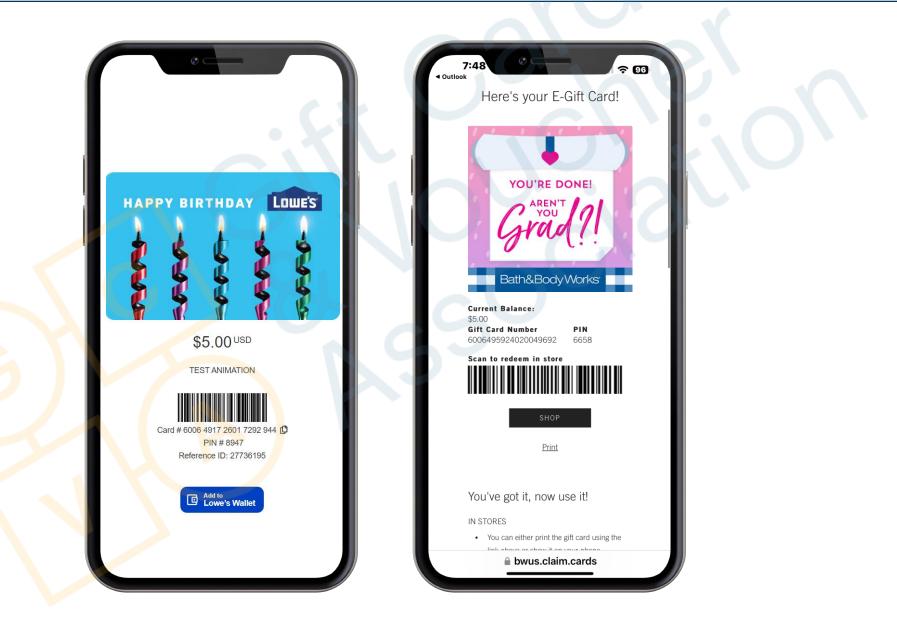






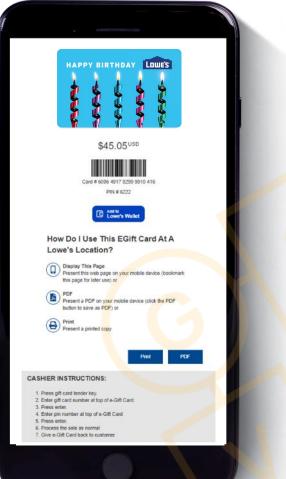
Delivery of Product – Animations Feel More Personal

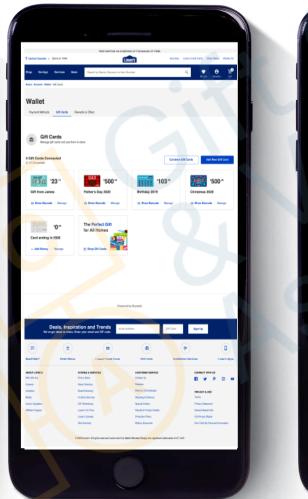




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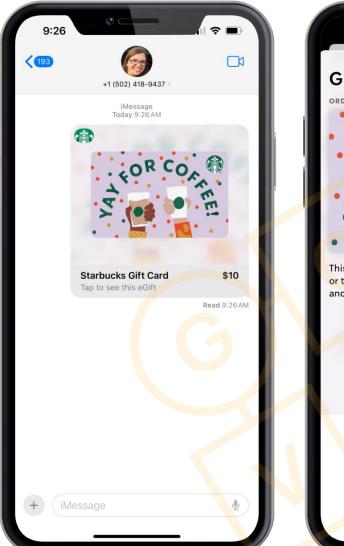
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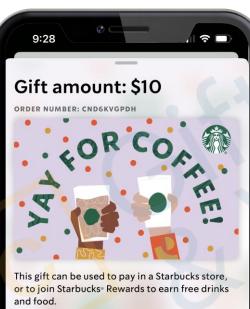
Delivery of Product – Starbucks



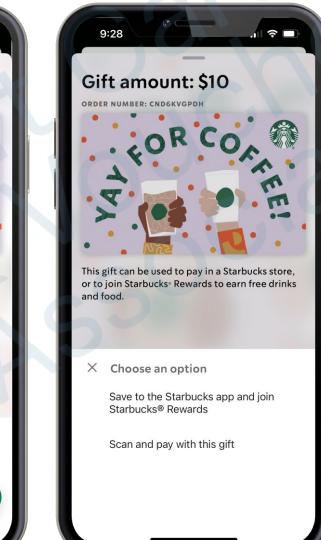


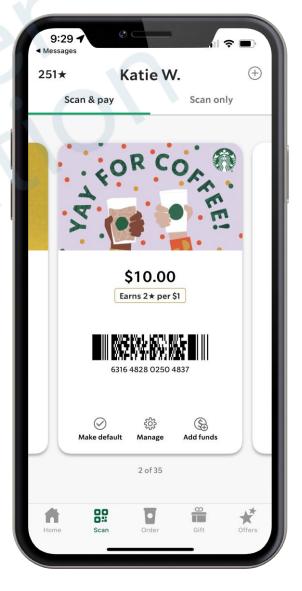
Delivery of Product



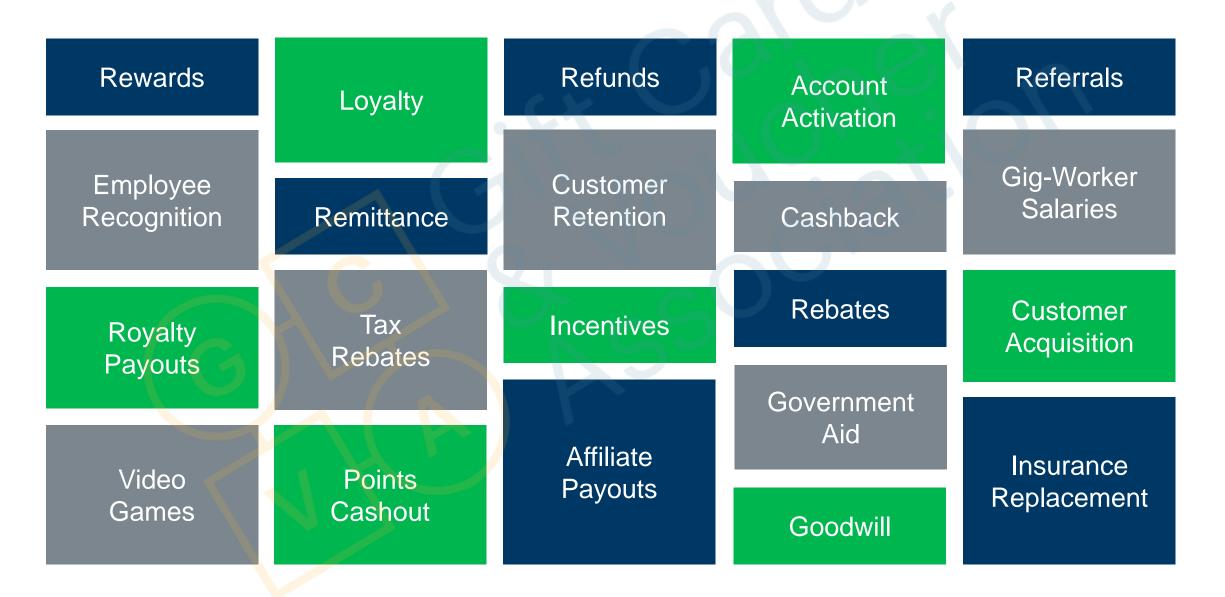


Use your gift card









Merging of the Physical & Digital World



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Physical into Digital

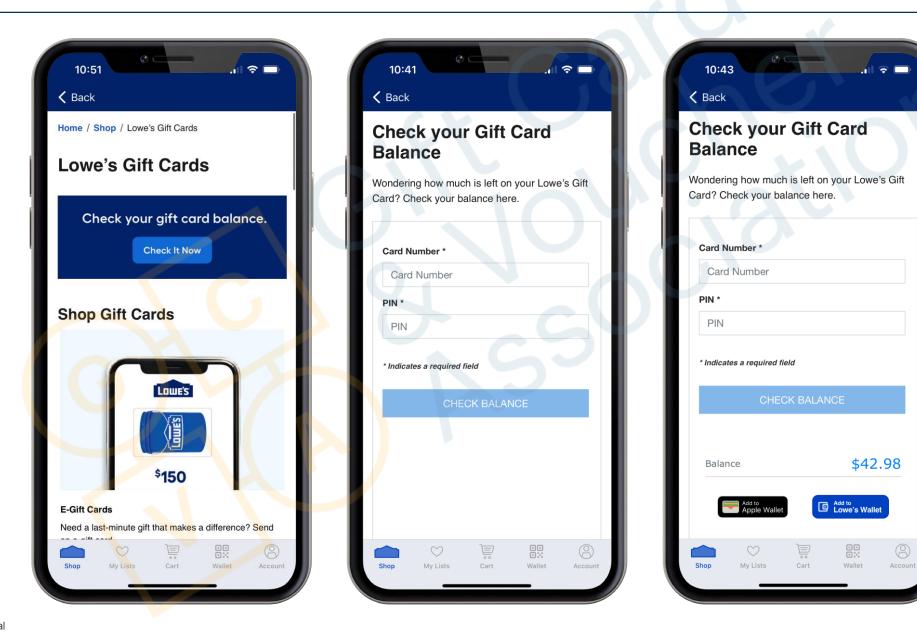


Physical into Digital – River Island





Web Balance Inquiry – Lowe's 🜉



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Add a Physical Gift Card to App – Subway

9:52 < ACCOUNT Subway® Gift Cards Gift Card Ending in 6484 \$3.67 USD Available Gift Card Ending in 8804 \$15.00 USD Available ADD A GIFT CARD SEND A GIFT CARD

9:52 OF ADD A SUBWAY® GIFT CARD	
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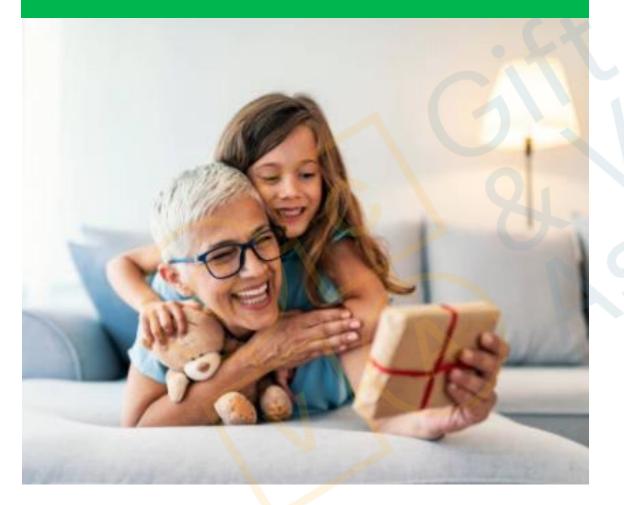


Let's Get Physical

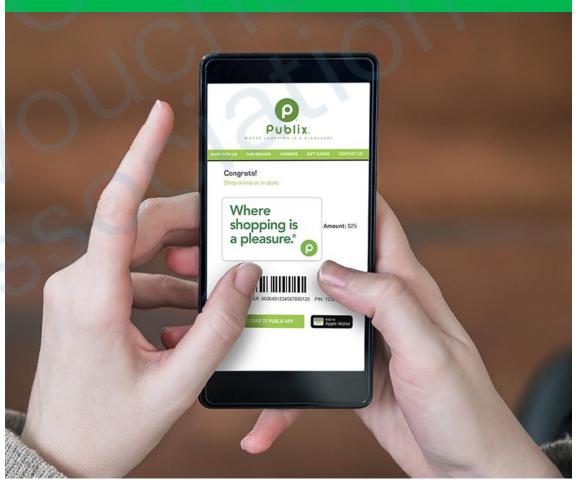
Overall SVS Trends



Physical Cards: 67%



Digital Cards: 33%



Physical Card Designs – Tesco 💥





card innovation – card, inset & carrier all combining





card innovation – one of the best-selling sku's

Specialty Packages – M&S 😹



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Point-of-Purchase – **M** and **M**







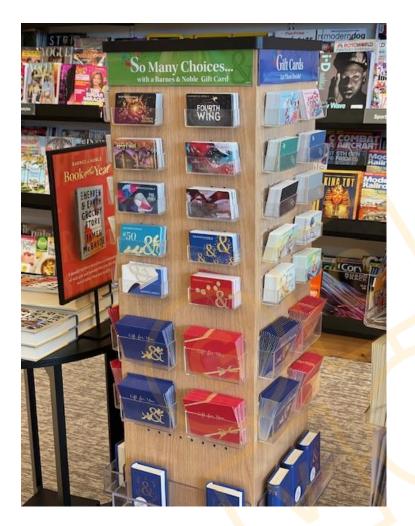
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B&Q UK

M&S UK







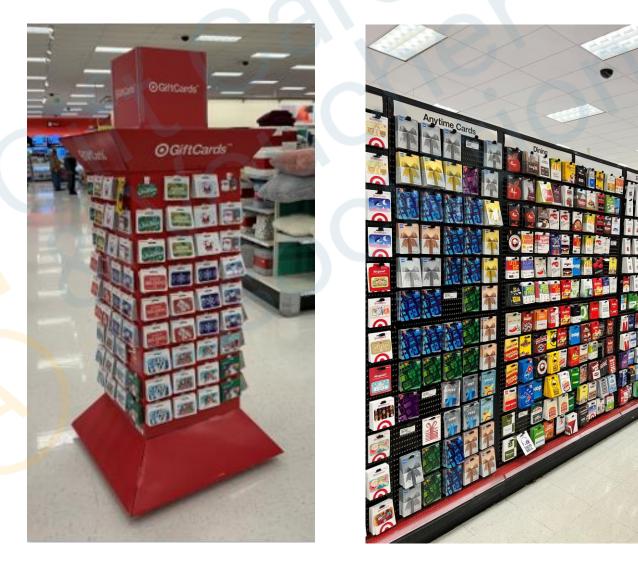




Gift Card Mall Experience



























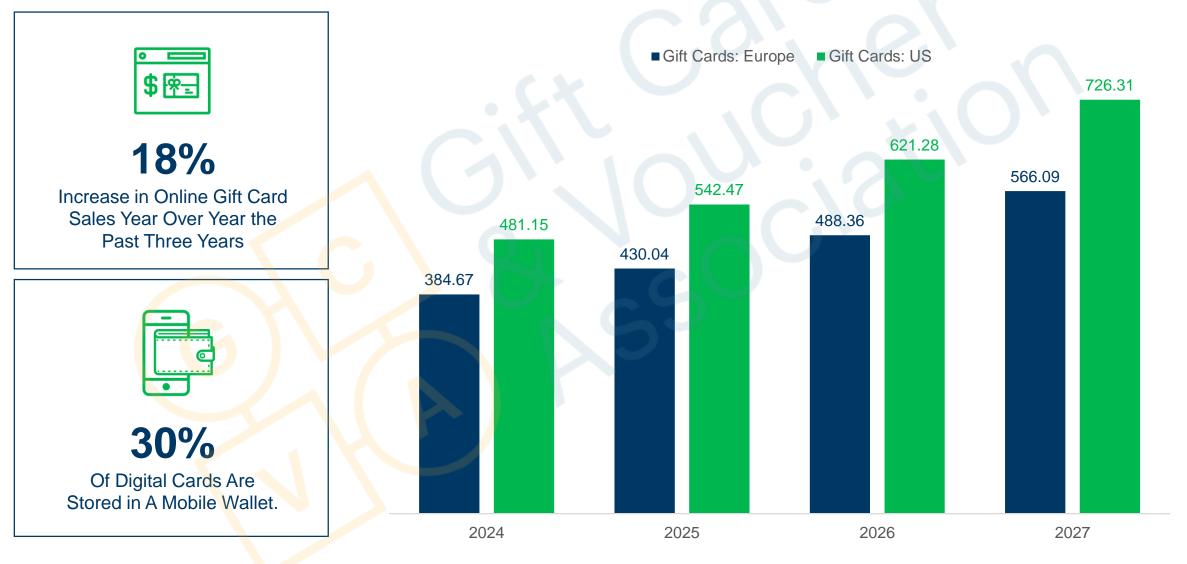








The Future?



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Summary



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- 3 Winning in G/C What Does Good Look Like?
- 4 WBI Merging of the Physical & Digital Worlds
- 5 Let's Not Forget Physical 🙂

Thank you.

SVS

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