



H2 Data Presentation

March 2018

TOP TAKEAWAYS

01

RETAILERS HAVE SHOWN GROWTH OF **4.43%** FOR THE YEAR

02

PAPER VOUCHER

SALES HAVE SEEN AN INCREASE IN THEIR MARKET SHARE IN THE PERIOD H2 2017 BUT STILL SHOW A DECLINE ON THIS TIME LAST YEAR

03

AGENTS HAVE SHOWN GROWTH OF **7.31%** IN H2 2017

04

LEISURE OPERATORS **IS ONCE AGAIN THE MOST SUCCESSFUL** SECTOR INCREASING THEIR GROWTH TO **25.87%** IN H2 2017

05

CATEGORY SPECIFIC PRODUCTS GREW BY **13.86%** AND REDEEM ANYWHERE BY **5.75%** IN H2 2017

06

B2B IN THE RETAIL SECTOR EXPERIENCED GROWTH OF **18.11%**

07

B2B REPRESENTS **46.35%** OF THE WHOLE MARKET IN H2 2017

08

GROWTH SEEN BY GIFT CARD MALLS IN THE YEAR IS **HIGHER** THAN SEEN IN RETAILERS OWN STORES

H2 2017 DATA OVERALL PERFORMANCE

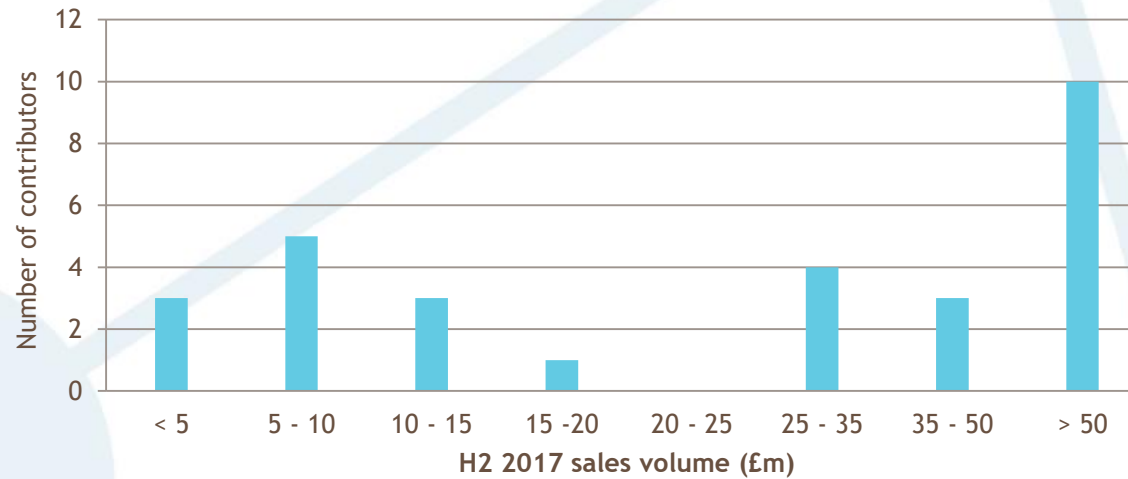
Area	Growth (%)
Consumer Sales	3.85
Business Sales	14.46
Total	8.51

Redemption type	Growth (%)
Category Specific	13.86
Multi-Choice	(0.94)
Redeem Anywhere	5.75

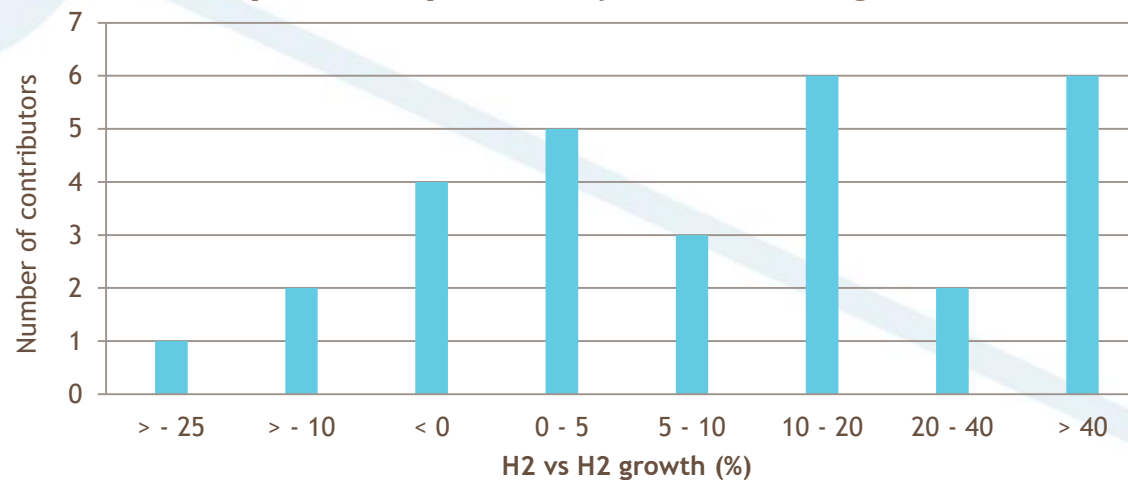
Sub-Group	Growth (%)
Retailer	7.10
Leisure Operator	33.68
Agent	7.31

H2 DATA SPREAD

Group data spread by volume

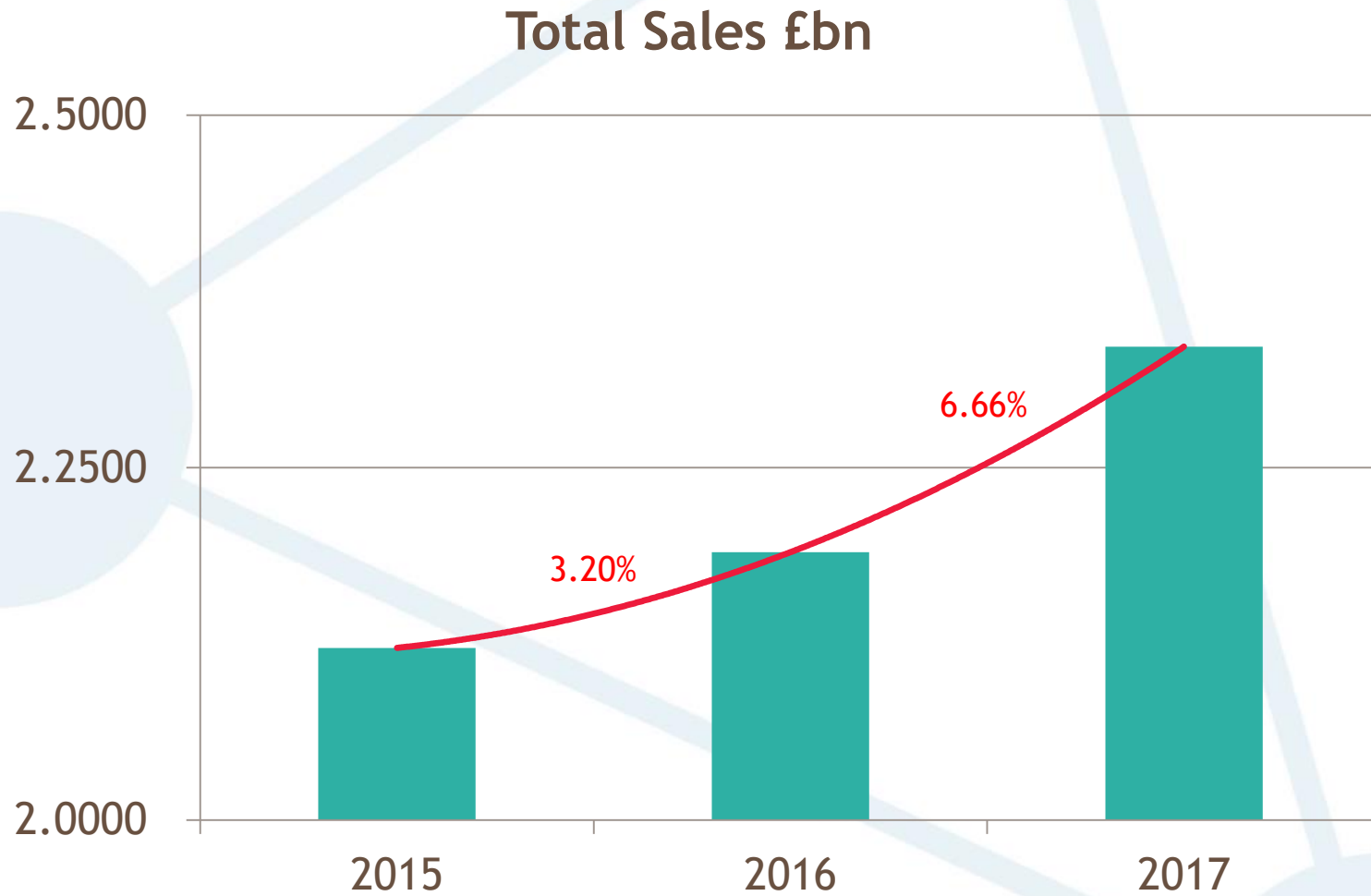


Group data spread by H2 vs H2 growth



DATA - YEARLY

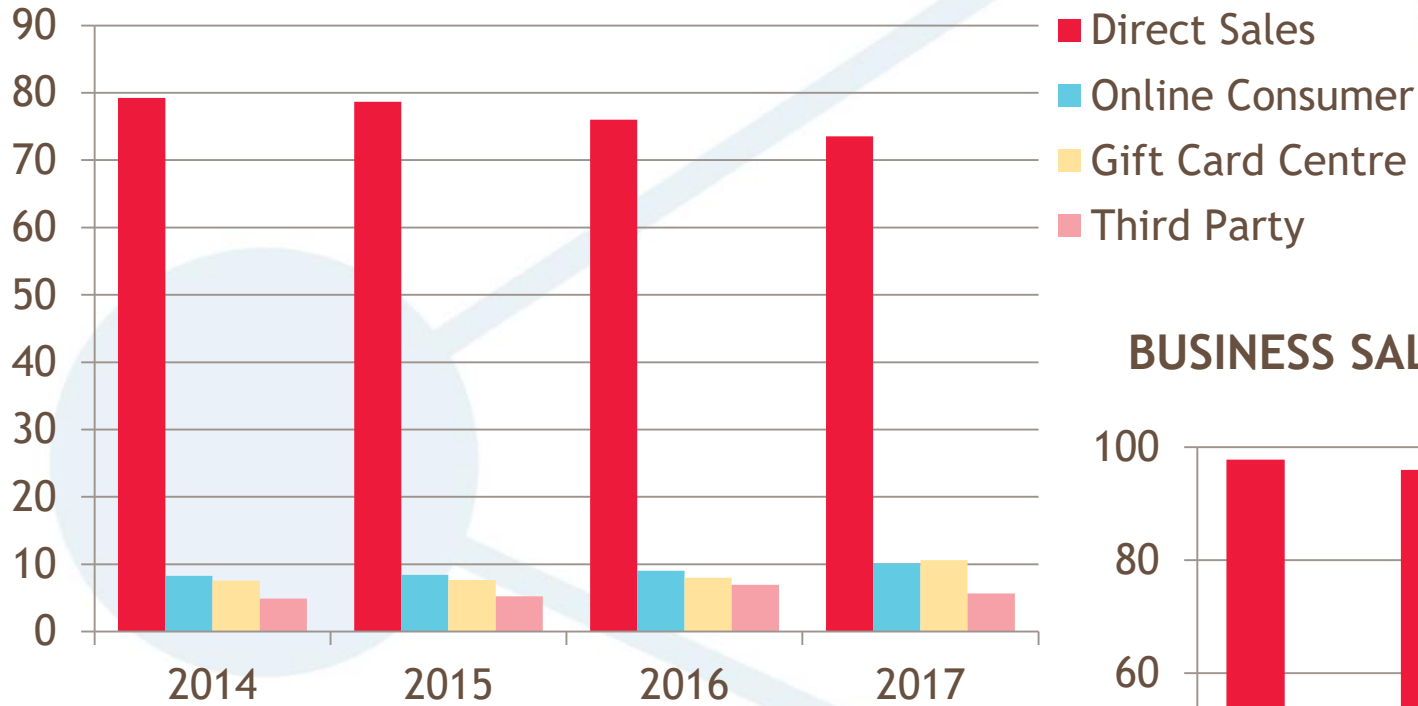
YEARLY SALES FIGURES - CURRENT MEMBERS ONLY



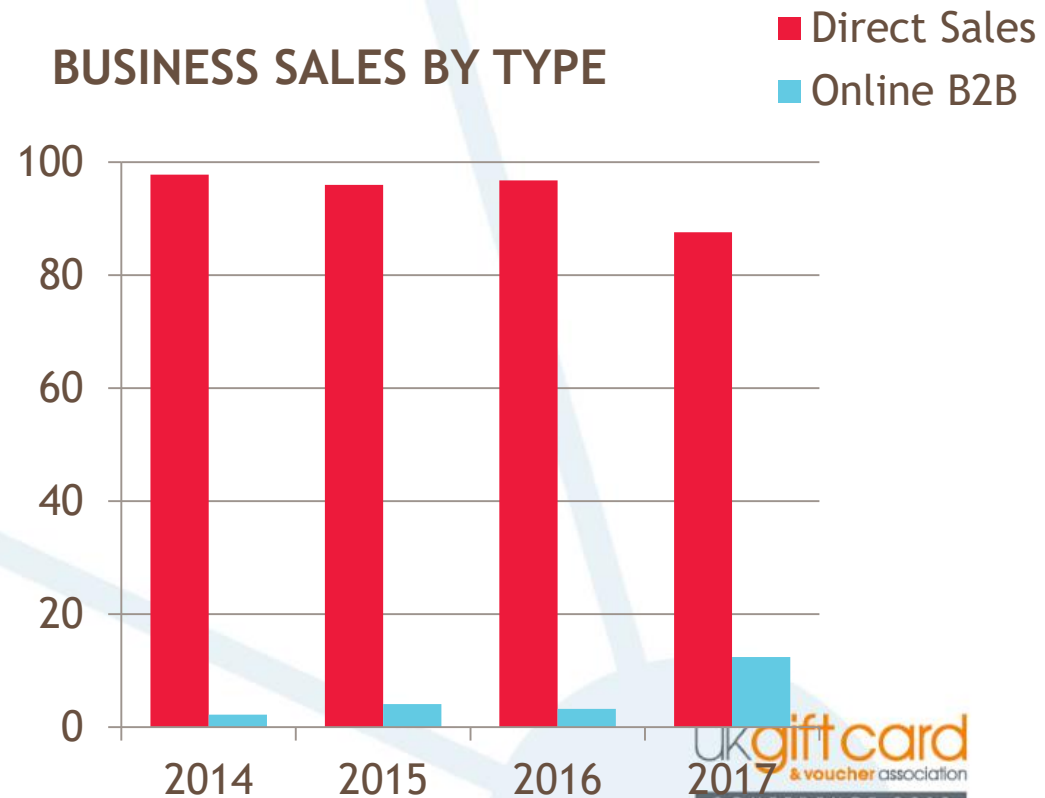
Data taken from the historic data base. Only includes the data of those who are part of the membership as of H2 2017 and have been members over the whole range of years identified above (for which data is available for the whole period)

DATA - YEARLY

% BREAKDOWN - CONSUMER SALES BY TYPE

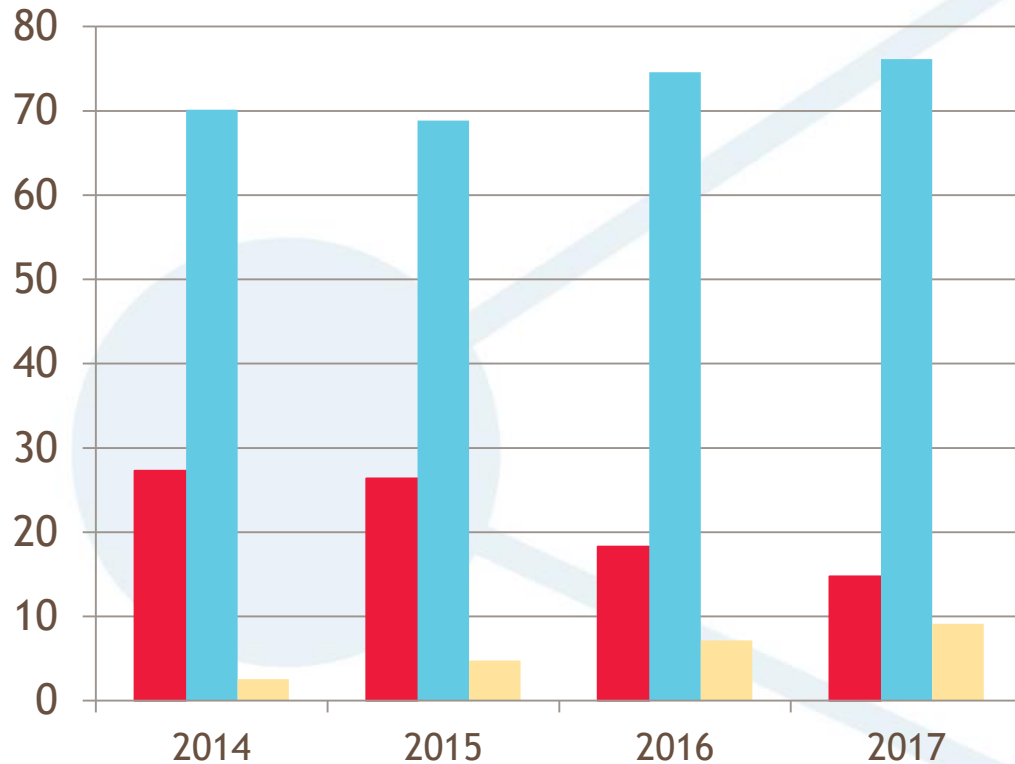


BUSINESS SALES BY TYPE

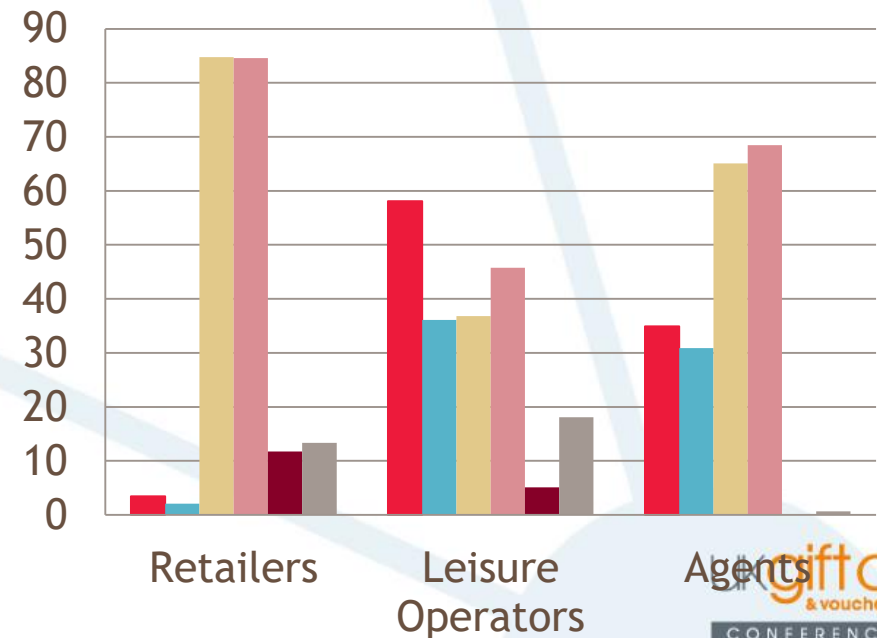
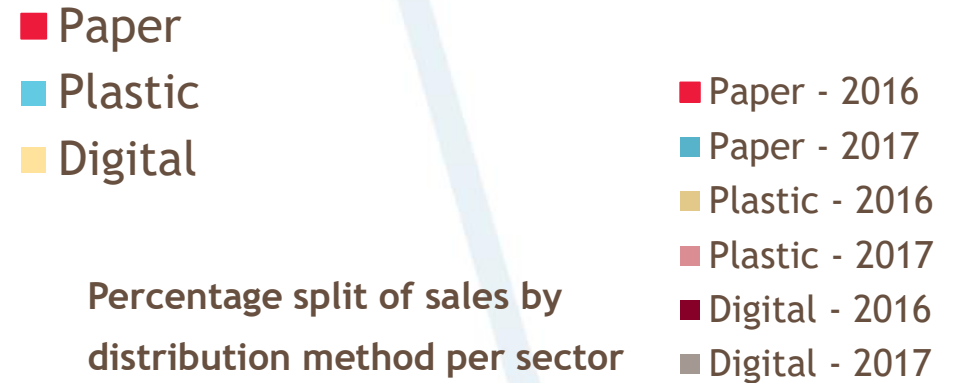


DATA - YEARLY

Percentage split of sales by distribution method

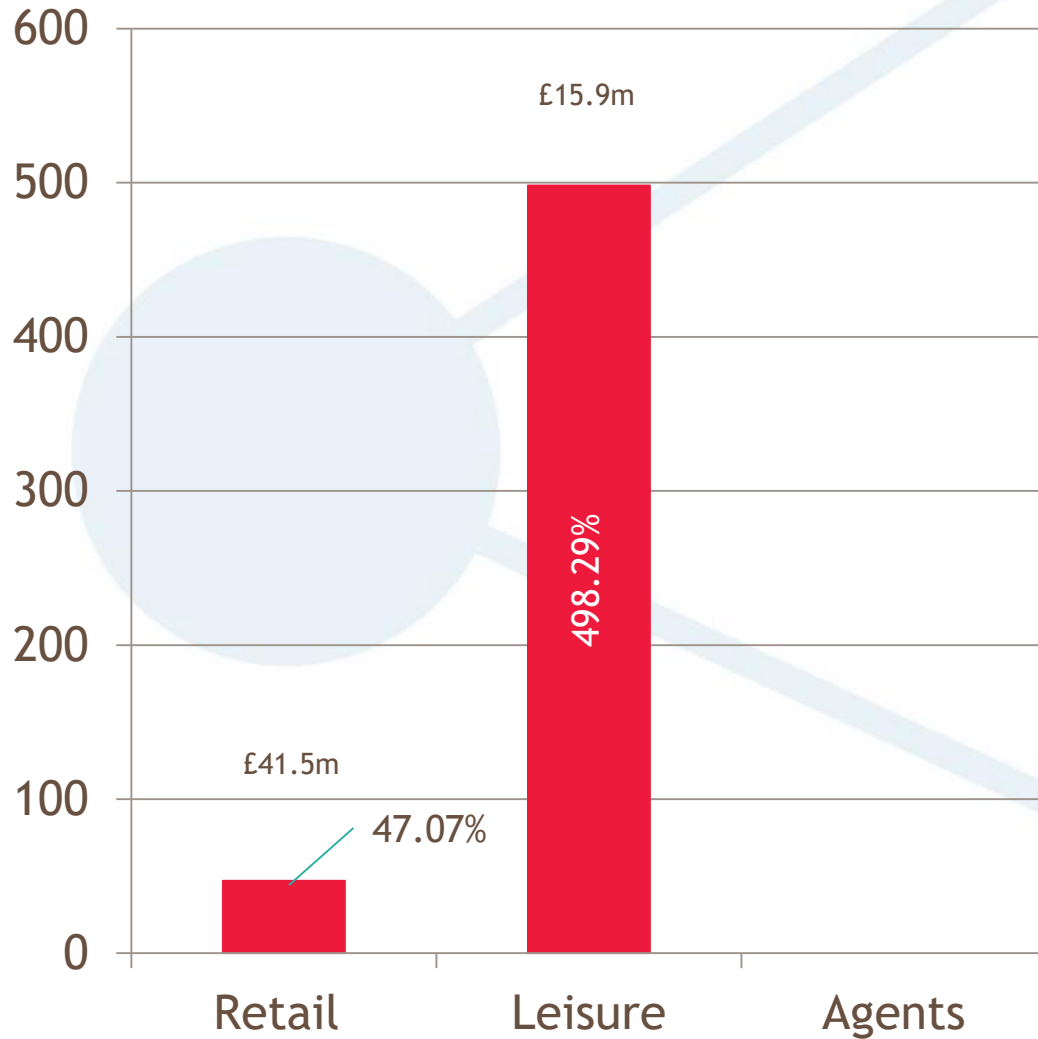


No adjustment has taken place for the movements in the membership due to the limitations in some of the historic data (E-voucher sales have been excluded).



DATA - DIGITAL

% H2 2017 growth by sub-sector



Total sub-sector volume shown above the bar.

% volume of sub-sector sales

