



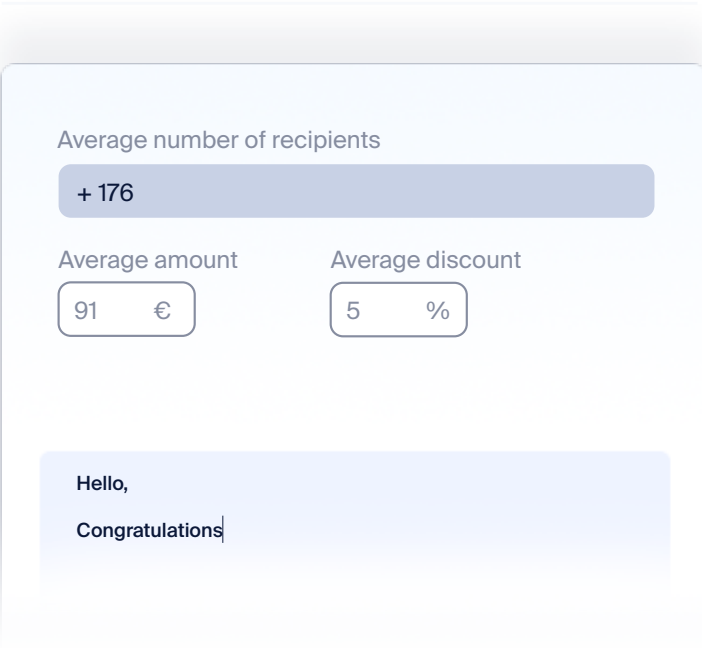
Types of B2B *Gift Card Buyers*



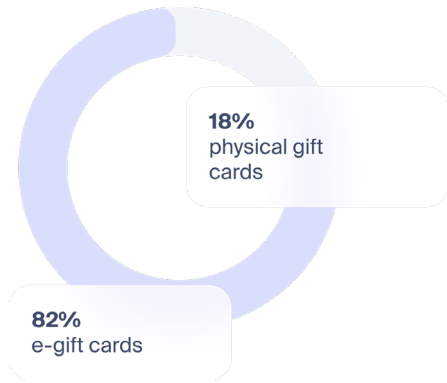
Figures 2025

Professionals and gift cards

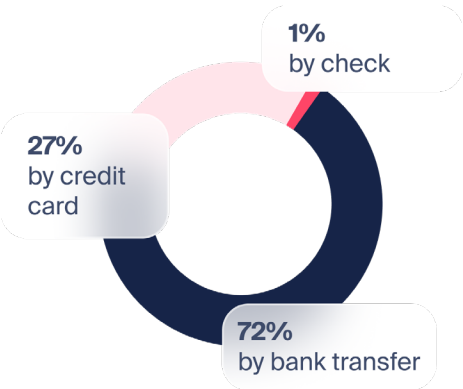
B2B order



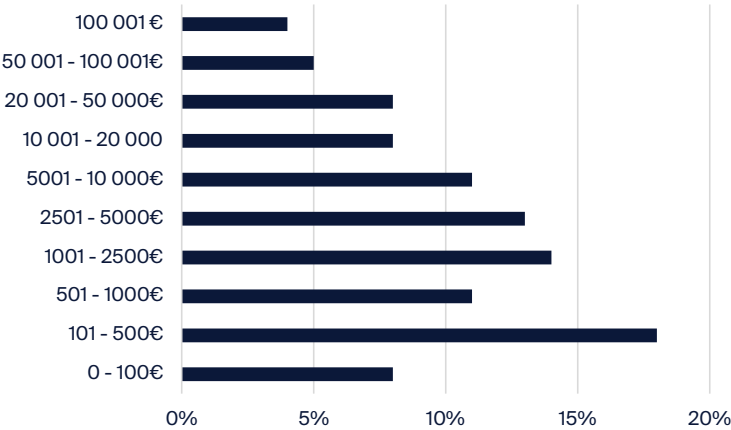
Share of gift card purchases



Payment methods



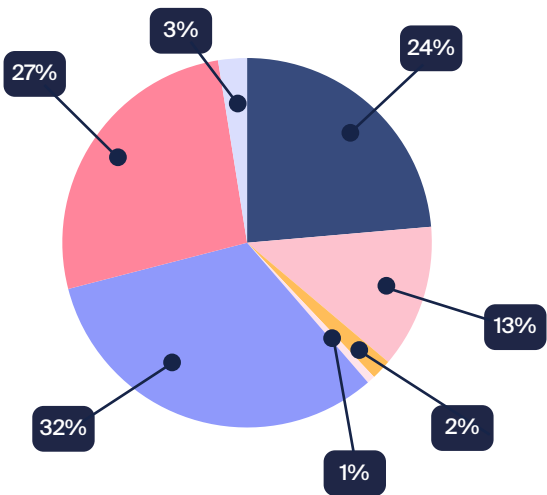
Distribution of B2B order amounts



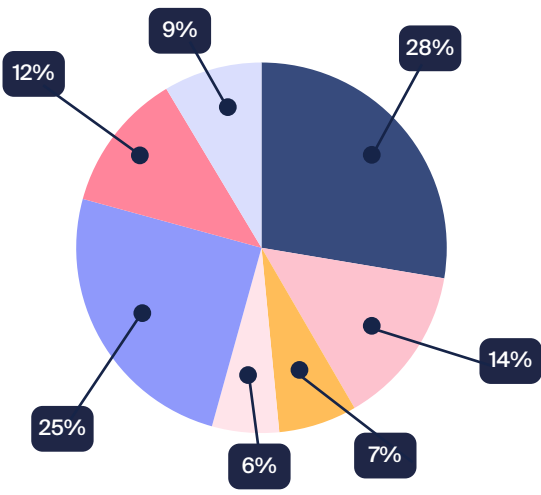
2025 figures

Performance by B2B customer type

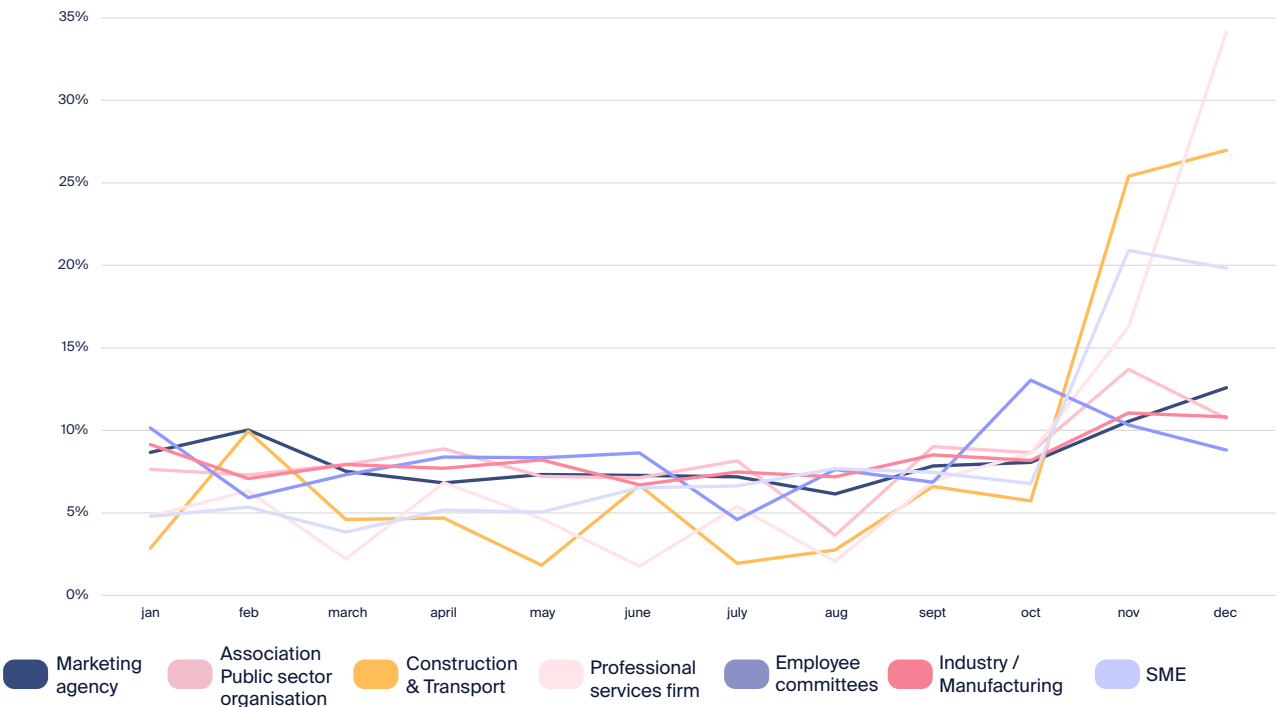
Share of annual business volume



Share of annual number of orders



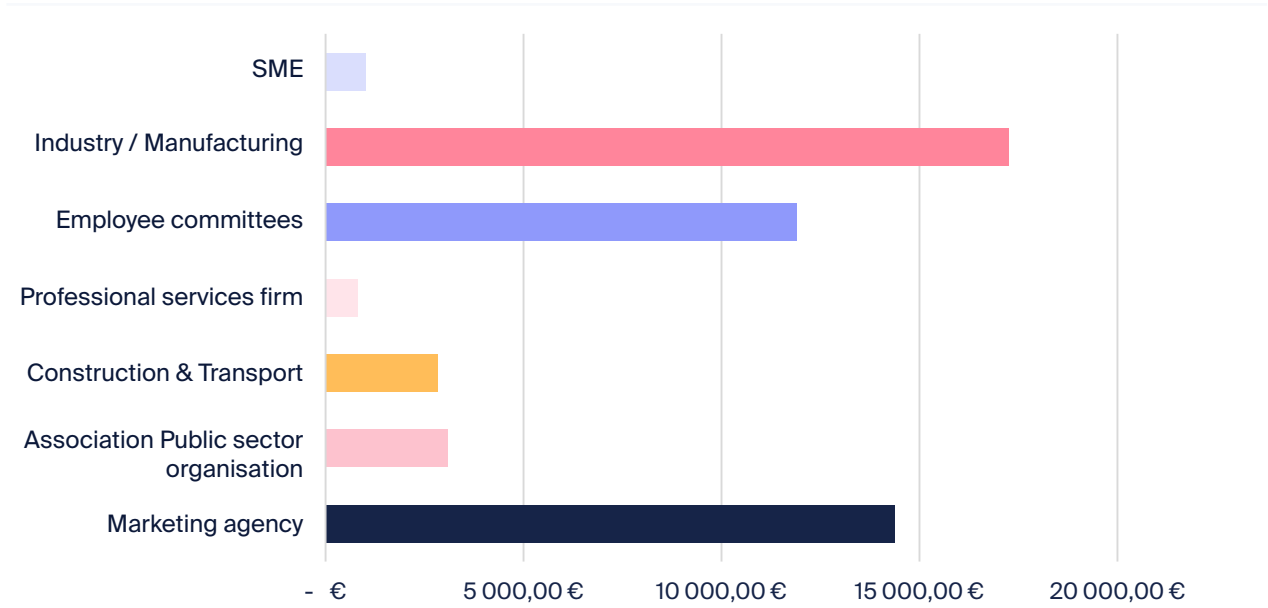
Annual sales volume



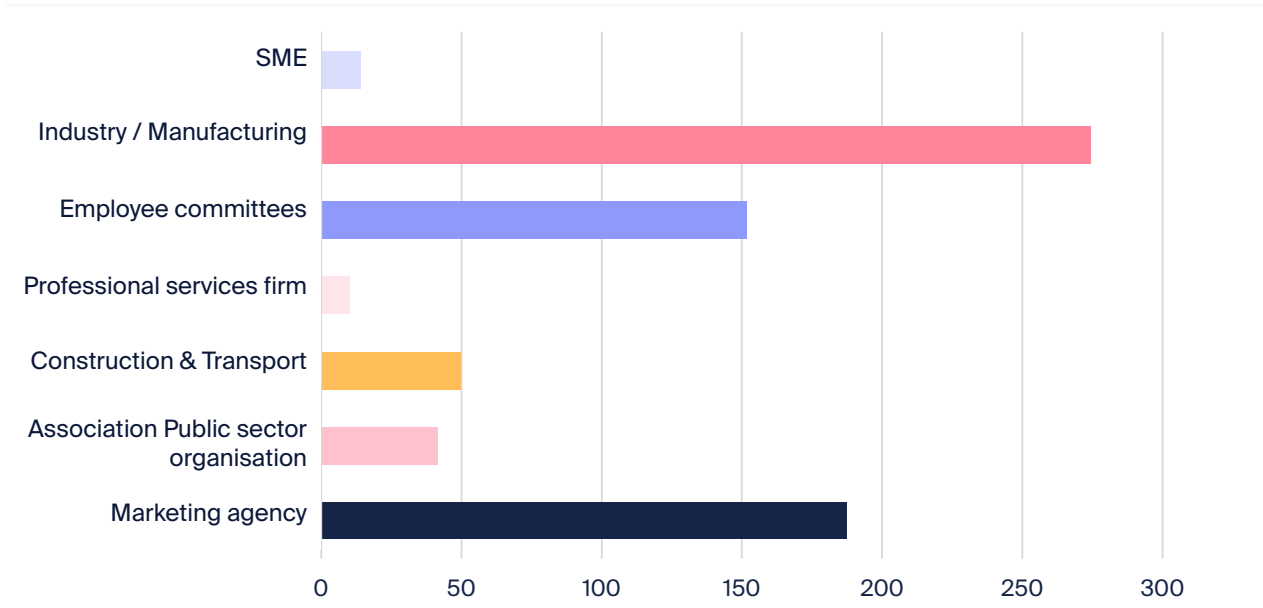
2025 figures

Performance by B2B customer type

Average order value



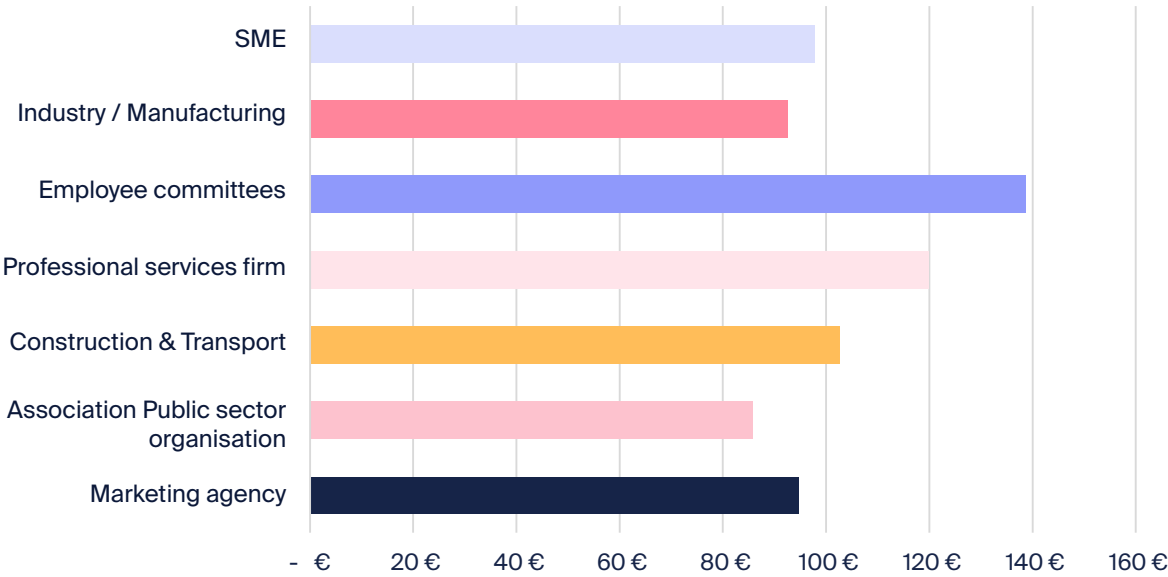
Average number of gift cards per order



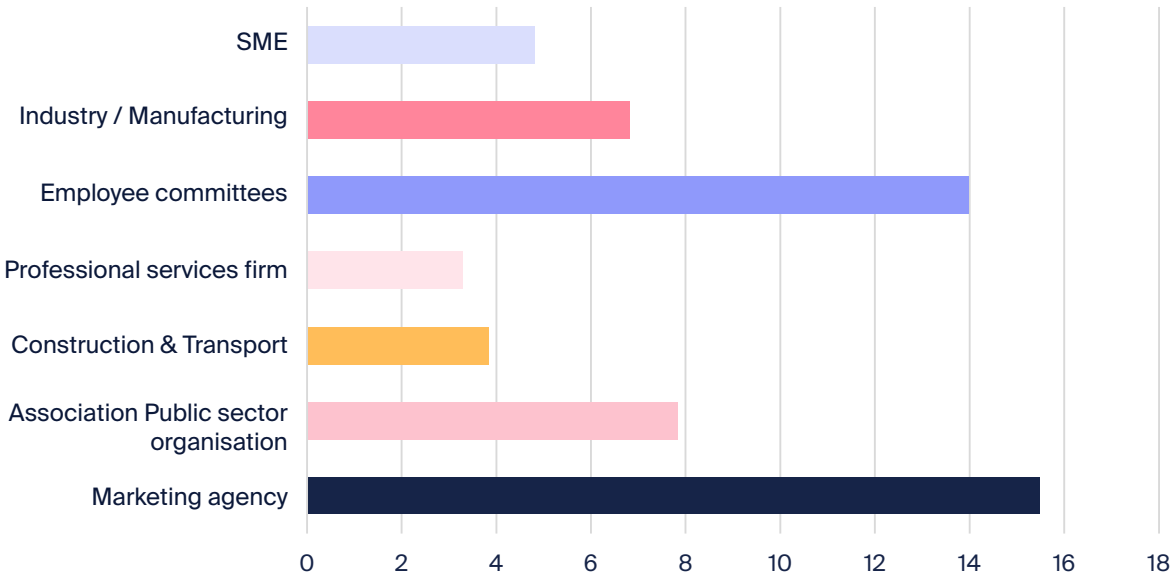
2025 figures

Performance by B2B customer type

Average gift card face value per order



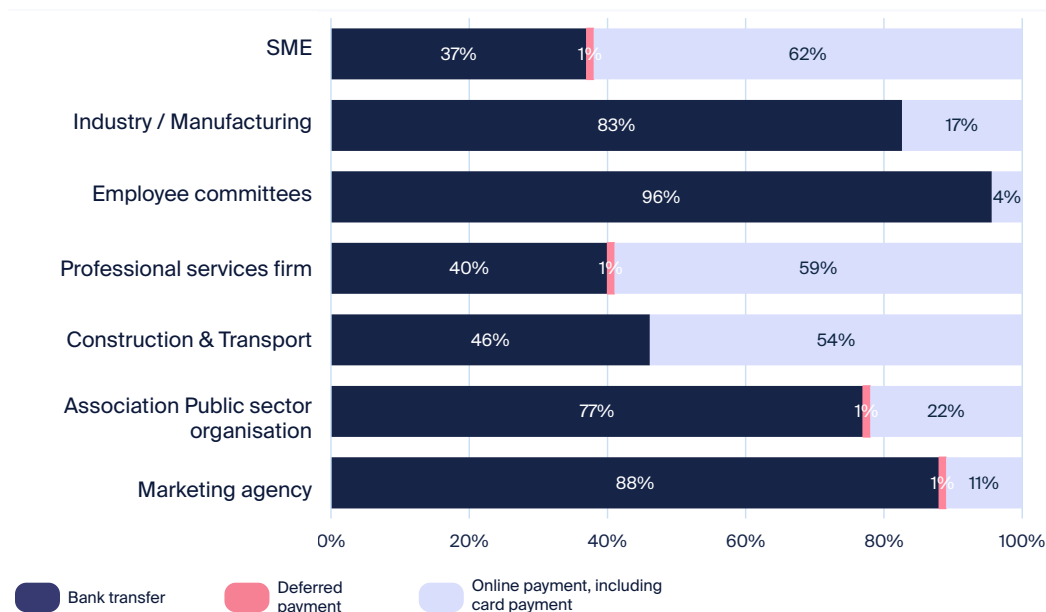
Average annual number of orders placed



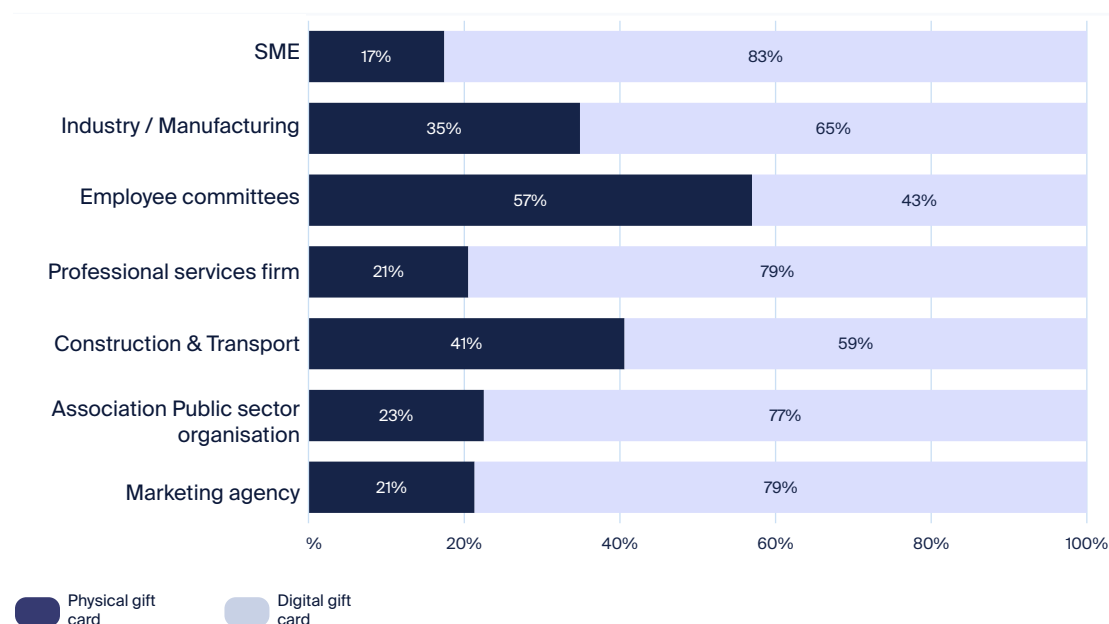
2025 figures

Performance by B2B customer type

Payment methods used



Types of gift cards ordered



Buybox insights

Direct B2B: an industrialised channel, but structurally selective

Direct B2B has entered an advanced industrialisation phase, marked by rising volumes, more standardised use cases and increasingly normalised formats.

Key indicators confirm this shift:

- ☑ average face value is increasing, at around €91;
- ☑ orders are significantly larger, at around €16,000 for approximately 176 cards;
- ☑ digitalisation has stabilised at a high level, around 82%.

Purchases are now anchored in clear budgetary and regulatory logic, with a strong focus on denominations aligned with URSSAF-compatible thresholds: €51–€100, then over €100.

The gift card is no longer an opportunistic purchase. It has become a tool integrated into HR, marketing and commercial policies.

A demanding channel, suited to structured brands

This industrialisation comes with higher expectations from buyers.

Direct B2B is not a universal lever. It is relevant only for brands able to support:

- ☑ significant volumes;
- ☑ contractual and pricing requirements;
- ☑ a high level of service, from pre-sales to delivery and customer support;
- ☑ operational and regulatory constraints, including invoicing, compliance and fraud prevention.

In practice, this requires a dedicated organisation: B2B sales, operations, support, finance and compliance.

A channel transformation: from mass market to targeted use cases

Direct B2B is not disappearing. It is becoming more specialised.

Some segments continue to favour a direct relationship with brands:

large companies;
public-sector organisations and local authorities;
agencies and specialised intermediaries.

Their motivations are clear:

negotiating commercial terms;
controlling prices;

maintaining a direct relationship with the brand.

This behaviour remains particularly strong in France, where supplier relationships and negotiation power continue to play a structuring role.

A heterogeneous market, managed by sector

Direct B2B is not homogeneous: dynamics vary significantly by sector.

Mass-Market Retail: large volumes, broad distribution logic.

Travel / Fashion: higher face values, more targeted volumes.

Food / Cosmetics: hybrid models, recurring demand and structured basket logic.

There is no one-size-fits-all strategy.

Performance depends on granular management by:

sector;
use case, such as reward, incentive, loyalty or compensation;
customer type.

Buybox insights

Customer types:
concentration around a few key segments

THE MARKET IS DOMINATED BY A FEW STRUCTURING CUSTOMER TYPES*:



32% of volumes

EMPLOYEE COMMITTEES

- ✓ 32 % of volumes
- ✓ Recurring, structured and highly regulated use cases.



27% of volumes

INDUSTRY / MANUFACTURING

- ✓ 27 % of volumes
- ✓ Purchases integrated into HR or commercial policies.



24% of volumes

MARKETING AGENCY

- ✓ 24 % of volumes
- ✓ Intermediary role, with use cases focused on activation and incentives.

Conversely, some customer types – such as SMEs, professional services firms, construction and transport companies – represent lower volumes, but show specific behaviours, often more seasonal.

**Third-party distributors such as employee benefit platforms, incentive platforms and loyalty programmes are not included in the study. However, when they are not connected to the brand via API or file exchange, they use the direct B2B service to purchase bulk gift card orders. Their purchases are generally recurring, with high volumes and high face values, making them top buyers.*

Buybox insights

MARKETING & COMMUNICATION AGENCIES: A KEY SEGMENT FOCUSED ON ACTIVATION

Marketing agencies account for 24% of B2B volumes, making them a structural growth lever for brands. Their role goes beyond purchasing: they embed gift cards at the heart of acquisition, loyalty and activation campaigns.

Activity is less dependent on seasonality than in other segments.

- ✓ 31% of volumes are generated at Christmas, but usage remains broadly spread throughout the year,
- ✓ with strong recurrence: 15 orders per year on average.

In this context, the gift card becomes a continuous marketing tool, activated in line with campaign cycles.



Volumes are high and well suited to large-scale operations.

~14 374 €

average order value

~187

cards per order

94 €

average face value

Buybox insights

MARKETING & COMMUNICATION AGENCIES:
A KEY SEGMENT FOCUSED ON ACTIVATION

In practice:

10 000 €

orders are often
higher-value;

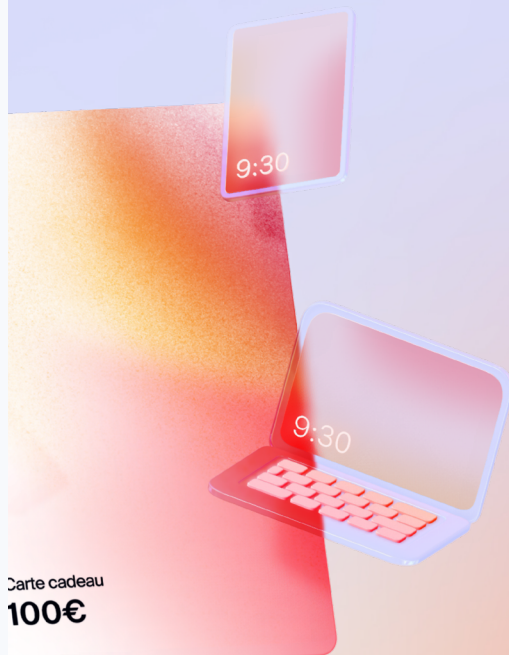
+200

more cards per campaign;

50 € et 100 €

mainly positioned
as digital cards.

These volumes are driven by mass
distribution mechanics, such as prize
draws, incentives and acquisition cam-
paigns.



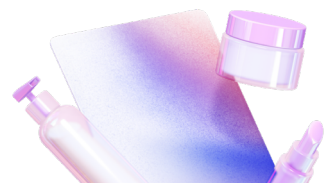
The model is highly digitalised and operationally seamless.

79%

of cards are digital, making
distribution easier.

88%

of payments are made by
bank transfer, consistent with
the high order values.



Buybox insights

MARKETING & COMMUNICATION AGENCIES: A KEY SEGMENT FOCUSED ON ACTIVATION

Margin pressure remains moderate

5%
average discount

Agencies tend to optimise around campaign performance rather than unit price.



Strategic takeaway

Marketing agencies are:

- ✓ a volume accelerator,
- ✓ a highly recurring segment,
- ✓ and a powerful indirect activation channel.

Key priorities

- ✓ **Structure a dedicated offer**
Highlight the main use cases: acquisition, conversion and engagement.
- ✓ **Integrate into campaign logic**
Be able to deliver quickly, at scale and with minimal friction across ordering, delivery and support.
- ✓ **Capture this scalable and recurring growth lever**
Build relationships with agencies so they recommend the brand to their clients.

Buybox insights

ASSOCIATIONS & PUBLIC SECTOR ORGANISATIONS A STABLE SEGMENT DRIVEN BY SOCIAL USE CASES

Associations and public sector organisations account for 13% of B2B volumes, with use cases centred on redistribution: member rewards, incentives or support for specific beneficiaries. Here, the gift card is a functional tool, often highly structured and focused on practical value.

33%
of volumes

8
orders per
year

Activity is relatively balanced throughout the year.

33% of volumes are generated at Christmas, but usage remains broadly spread across the year, with an average of 8 orders per year.

This is a more stable than opportunistic segment.

Volumes are mid-sized and structured.

~3 000 €
average order value

~41
cards per order

85 €
average face value

Buybox insights

ASSOCIATIONS & PUBLIC SECTOR ORGANISATIONS
A STABLE SEGMENT DRIVEN BY SOCIAL USE CASES



In practise:

1 000 € and 5 000 €

orders

10 to 50

gift cards

50 € and 100 €

amounts

Budgets are controlled, with a clear focus on spend management.

The model is predominantly digital, while still remaining hybrid.

77%

of cards are digitals

77%

of payments are made by bank transfer.



Processes are relatively structured, with a strong need for simplicity.

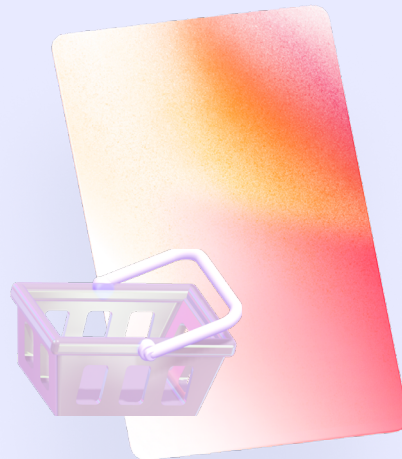
Buybox insights

ASSOCIATIONS & PUBLIC SECTOR ORGANISATIONS A STABLE SEGMENT DRIVEN BY SOCIAL USE CASES

Pricing sensitivity remains moderate

6%
average discount

Decisions are made by balancing budget, ease of use and fit with the need.



Strategic takeaway

Associations and public sector organisations represent:

- ✓ a stable and recurring segment,
- ✓ mid-sized volumes,
- ✓ and a strong social-use dimension.

Key priorities

- ✓ Offer a simple, clear and accessible proposition to capture regular volume.
- ✓ Adapt the messaging to the use case by highlighting the concrete impact: rewarding, helping and supporting.

Buybox insights

CONSTRUCTION / TRANSPORT: AN OPPORTUNISTIC AND SEASONAL SEGMENT

Construction and transport companies use gift cards mainly as a reward tool for employees, partners or clients. Usage remains occasional and relatively unstructured.



Activity is highly concentrated around Christmas.

- ✓ 58% of volumes are generated at year-end
- ✓ 4 orders per year on average

In this segment, the gift card is an occasional lever, activated around key moments.

Volumes are low and fragmented.

2 %

Share of total volumes

~2 800 €

Average order value

102 €

Average face value

Buybox insights

CONSTRUCTION / TRANSPORT: AN OPPORTUNISTIC AND SEASONAL SEGMENT

In practise:

< 500 €

Numerous orders

~ 10

Cards per order

50 € and 100 €

amounts

An atomised segment, with purchases that are often opportunistic.

The model remains hybrid and only partially digitalised.

59 %

digital

46 %

physique

Payments are simple and fast

54 %

online

46 %

bank transfer

Consistent with lower order values.

Buybox insights

CONSTRUCTION / TRANSPORT: AN OPPORTUNISTIC AND SEASONAL SEGMENT

Price sensitivity is
higher

8%
average discount



Strategic takeaway

A segment that is:

- ☒ flow in volume,
- ☒ highly seasonal,
- ☒ and relatively unstructured.

Key priorities

- ☒ Adopt a simple, fast and opportunistic approach, without overinvesting.
- ☒ Focus on Christmas and make the purchase journey as simple as possible.

Buybox insights

PROFESSIONAL SERVICES FIRMS: A PREMIUM, LOW-VOLUME SEGMENT

Professional services firms — accounting, consulting, architecture, innovation and similar — use gift cards as a targeted recognition tool: rewarding senior employees, partners or strategic clients. Usage is qualitative, but not highly industrialised.



**Activity is highly occasional
and strongly seasonal.**

- ✓ 59% of volumes are generated at Christmas
- ✓ 3 orders per year on average

In this segment, the gift card acts as a recognition lever, activated around key moments.

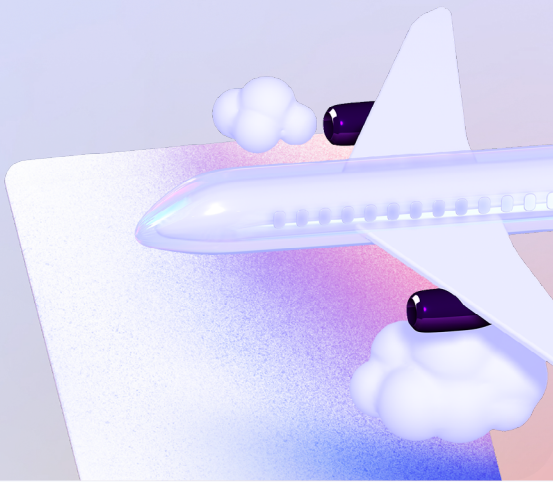
**Volumes are low, but unit
value is high.**

- ✓ Around 1% of total volumes
- ✓ Average order value: ~€825
- ✓ ~10 cards per order
- ✓ Average face value: €120



Buybox insights

PROFESSIONAL SERVICES FIRMS: A PREMIUM, LOW-VOLUME SEGMENT



In practise:

< 500 €

orders

~10

gift cards

100 € and 200 €

High values

Logic: low volume, but a more premium positioning.

The model is predominantly digital and flexible.

- ☑ **79 %** of cards are digital.

Payments are suited to smaller order values:

- ☑ **59 %** by card payment
- ☑ **40 %** by bank transfer

Simple, fast journeys with minimal friction.

Pricing sensitivity remains moderate.

- ☑ Average discount of around 7%.

Decision-making balances brand image, perceived quality and budget.

Strategic takeaway

Professional services firms represent:

- ☑ a low-volume segment,
- ☑ a highly seasonal segment,
- ☑ but one with high unit value.

Key priorities

- ☑ Offer a premium proposition focused on image, experience and brand perception.
- ☑ Make the purchase journey as simple as possible with fast online ordering.

Buybox insights

EMPLOYEE COMMITTEES: A MAJOR, STRUCTURED AND RECURRING SEGMENT

Employee Committees account for 32% of B2B volumes, making them the leading segment in the channel. Despite the rise of employee benefit platforms, some Employee Committees still purchase directly from brands to retain control over commercial terms and distribution.

Use cases are structured and clearly framed, mainly focused on redistribution to employees: events, benefits and rewards.

Activity is both seasonal and recurring.

- ✓ 32% of volumes are generated at Christmas
- ✓ 14 orders per year on average

A segment that is already largely annualised, with regular purchasing behaviour.



Volumes are high and industrialised.

12 000 %

Average order value

~152 €

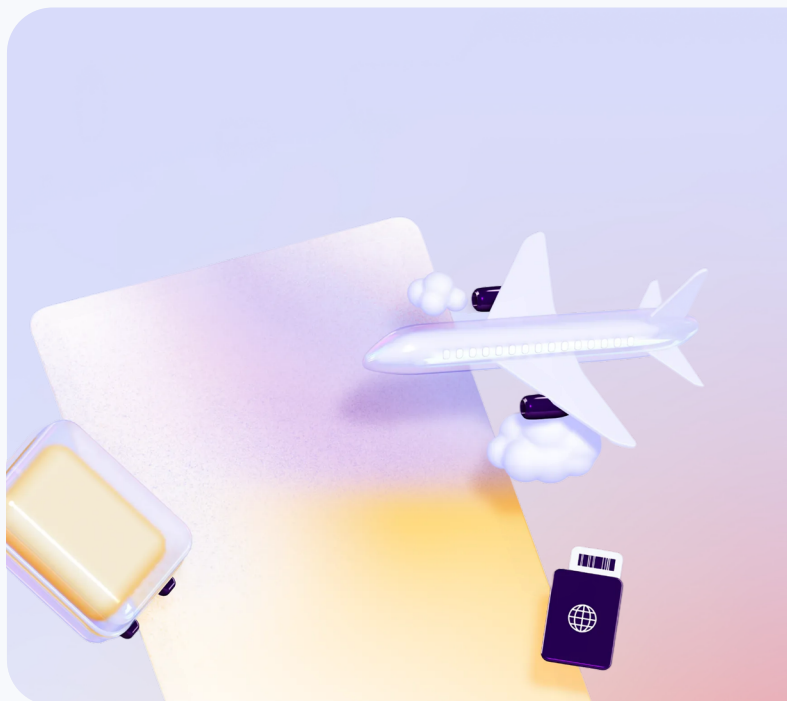
Cards per order

139 €

average face value

Buybox insights

**EMPLOYEE COMMITTEES:
A MAJOR, STRUCTURED AND RECURRING SEGMENT**



In practise:

> 10 000 €
orders

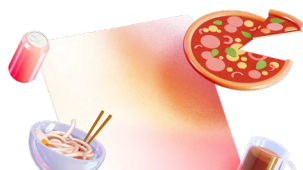
+100
gift cards

50 € and 100 €
average amount

A key segment for generating recurring volume.

The model remains strongly oriented towards physical cards.

57%
of physical gift cards



43%
of digitals

Physical cards remain well suited to employee distribution.

Buybox insights

EMPLOYEE COMMITTEES: A MAJOR, STRUCTURED AND RECURRING SEGMENT

Payments are highly structured.

95 %
paid by bank transfer

This is consistent with high order values and clearly defined processes.



La sensibilité au pricing est modérée.

6%
average discount

Decision-making balances budget, attractiveness and ease of management.



Takeaway stratégique

Employee Committees represent:

- ✓ a major volume segment,
- ✓ recurring and structured demand,
- ✓ and strong purchasing power.

Key priorities

- ✓ Offer a reliable, compliant and scalable solution, with simple management across ordering, tracking and distribution.
- ✓ Adapt formats to employee committee needs: physical cards, digital cards or hybrid batches, while highlighting URSSAF compliance.

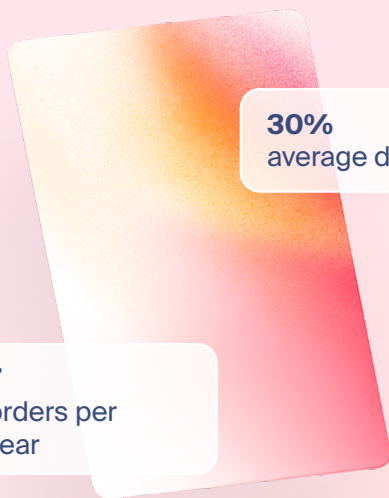
Buybox insights

INDUSTRY:

A KEY, STRUCTURED AND HIGH-VOLUME SEGMENT

Industrial companies — including food manufacturing, materials, automotive, technical services and related sectors — account for 27% of B2B volumes, making them the second-largest segment.

Gift cards are used as a structured reward and incentive tool for employees, networks and partners.



30%
average discount

7
orders per
year

Activity is partly seasonal, but well spread throughout the year.

- ☑ 30% of volumes are generated at Christmas
- ☑ 7 orders per year on average

A segment already moving towards an annualised purchasing logic.

Volumes are high and industrialised.

17 200 €

Average order value

~275 €

Cards per order

95 €

average face value

Buybox insights

INDUSTRY:

A KEY, STRUCTURED AND HIGH-VOLUME SEGMENT



In practise:

- > 5000 €**
orders
- +100**
gifts cards
- 50 € and 100 €**
amount

A high-volume segment with recurring use cases.

The model is predominantly digital to make distribution easier.

Le modèle est majoritairement digital pour faciliter la diffusion.

65%
of cards are digital.

Payments are structured and secure.

82%
paid by bank transfer.



This is consistent with high order values and clearly defined processes.

Buybox insights

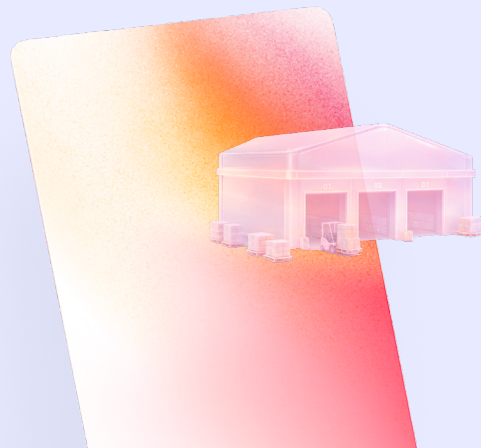
INDUSTRY:

A KEY, STRUCTURED AND HIGH-VOLUME SEGMENT

**Margin pressure re-
mains limited.**

5%
average discount

Decision-making is driven by volume
and operational simplicity.



Key priorities

Industrial companies require a structured, operations-focused approach.

- ✓ **Target key functions**
HR, procurement, marketing and site management.
- ✓ **Highlight the ability to manage volume**
Reliability, delivery capacity and scalability.
- ✓ **Emphasise simplicity and efficiency**
Ordering, distribution and tracking.
- ✓ **Integrate into existing programmes**
Incentives, rewards and loyalty initiatives.

Strategic takeaway

Industrial companies represent:

- ✓ a major volume segment,
- ✓ recurring and structured demand,
- ✓ and strong potential for industrialised management.

Buybox insights

SMALL BUSINESSES / SMES: A FRAGMENTED, SIMPLE AND OPPORTUNISTIC SEGMENT

Small businesses and SMEs account for 3% of B2B volumes. These are generally smaller organisations, often without an Employee Committee, that use gift cards as a simple reward tool for employees or clients.



Activity is highly seasonal.

- ✓ 48% of volumes are generated at Christmas
- ✓ 5 orders per year on average

Usage is occasional, with an opportunistic logic.

Volumes are low and fragmented.

~1 000 €
Average order value

~14
Cards per order

98 €
average face value

Buybox insights

**SMALL BUSINESSES / SMES:
A FRAGMENTED, SIMPLE AND OPPORTUNISTIC SEGMENT**



In practise:

> 500 €

Numerous orders

-10

gift cards

50 € and 100 €

montants

An atomised segment, with small-sized purchases.

Le modèle est très digital et orienté simplicité. The model

☑ **83 %** of cards are digital

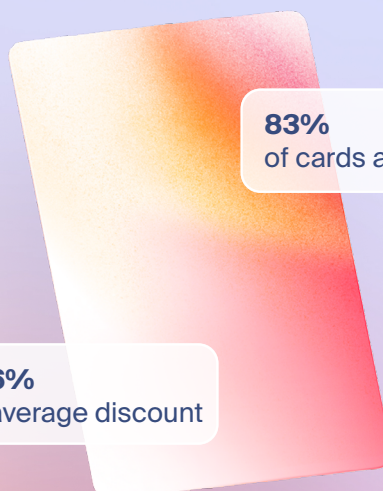
Payments are mainly made online by card.

Journeys must be fast and frictionless.

Pricing sensitivity is moderate,

☑ with an average discount of around 6%.

Decision-making balances budget and convenience.



Buybox insights

SMALL BUSINESSES / SMES: A FRAGMENTED, SIMPLE AND OPPORTUNISTIC SEGMENT

Key priorities

Small businesses and SMEs require a simple, direct and scalable approach.

- ☑ Target owner-led decision-making
Focus on business owners or single decision-makers.
- ☑ Simplify the purchase experience
Fast, frictionless online ordering.
- ☑ Capitalise on key moments
With Christmas as the main priority.
- ☑ Offer accessible options
Small volumes and standard denominations.

Strategic takeaway

Small businesses and SMEs represent:

- ☑ a low-volume segment,
- ☑ highly fragmented demand,
- ☑ and a strongly digitalised purchasing behaviour.



BONUS – Loto:
a niche segment, highly recurring but
difficult to control

Loto organisations use gift cards as prizes for their events, with a simple use case that is strongly rooted in repetition.

The segment remains marginal, accounting for around 3% of volumes, but stands out for its very high recurrence, with up to 30 orders per year.

Volumes are low and fragmented, with an average order value of around €706, approximately 12 cards per order, and average face values of around €81.

In practice, most orders are below €500, with fewer than 10 cards and lower denominations, typically between €30 and €70.

The model is almost entirely digital (97%), with purchases mainly made online. This makes it an autonomous segment: simple to operate and inexpensive to serve.

However, this segment raises a brand image consideration. The usage contexts – loto, games and local events – are difficult to control and may sometimes sit outside the positioning or brand universe of certain brands.

Key priority: capture this recurrence through a simple, automated approach, while carefully assessing whether the use case is consistent with the brand image.

