

2022 | Global Customer Loyalty Report

It's Time to
Take Action



antavo

Executive Summary

The Global Customer Loyalty Report 2022 provides a comprehensive look into the current and future state of the loyalty market through the eyes of companies and loyalty experts. The report is recommended for all brands, no matter whether they currently offer a loyalty program, are planning to launch one, or are in the process of a revamp.

Utilizing the insight provided by over 325 corporate survey respondents from all regions of the world, the data from 25 million member actions tracked via Antavo's Loyalty Management system,

additional insight from a PwC expert, and interviews with respected industry professionals, this report is a sanity check for the C-level marketing community. It will help marketing decision-makers compare their expectations to the current customer reality and uncover loyalty program trends and strategies that will shape how customers engage with brands in the coming years.

Key report takeaways:

- **71.6%** of respondents at companies with an existing loyalty program plan to revamp their existing loyalty program within the next three years
- **93.1%** of companies that measure ROI (return on investment) for their loyalty program have a positive ROI
- Tiered program owners have reported a **1.8x** higher return on investment compared to programs that do not offer tiers
- Starbucks Rewards, Sephora's Beauty Insider and Amazon Prime are among the most influential loyalty programs on the market
- In the next three years, a seamless omnichannel experience, personalized rewards, and loyalty-enhanced data collection will be the most important trends

This report is meant to be an **action plan** for current or future loyalty program owners so that they can **make informed decisions based on an accurate analysis of the current market** so they can increase the performance of their loyalty program, drive important business KPIs, as well as build a long-standing relationship with their customers.

This report will give you the momentum and relevance you need by helping you make the right decisions for your loyalty program.

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Editorial Letter

Dear Marketing Leaders and Loyalty Professionals,

In the post-pandemic world, we are witnessing digital transformation as we've never seen it before. Retail as we know it is being reinvented in front of our very eyes, privacy laws have forced companies to reevaluate their data strategy, and eCommerce is going through a hyperjump.

All of this has had a profound impact on marketing, customer retention, and, most importantly, loyalty. And this change is universal across all countries and industries, as new loyalty programs are being launched in a wide variety of sectors, including agriculture, automotive, fashion, transportation, and more.

In order to help you navigate this new customer reality, we decided to compile an insightful loyalty report, but with a twist: instead of asking customers how they see loyalty programs, we asked current and future loyalty program owners, as well as loyalty experts, to share their views on a variety of trends and loyalty-related subjects. And to ensure a **360-degree view** of customer loyalty, we also analyzed **25 million member actions** in loyalty programs to better understand user behavior. After reviewing all the information, we came to an exciting conclusion: the core concept of loyalty programs will become more emotional and customer-centric over the next three years!

Businesses all around the world have sensed a new opportunity in how modern customers are engaging, so existing program owners are planning to revamp their programs to follow this narrative. And new reward programs that are still in development have this sentiment baked into their strategy. **The loyalty management market will be worth \$15.5 billion by 2025***, so this is your window of opportunity to become an early adopter and stay ahead of the curve.

It's time to take action!



Zsuzsa Kecsmar
Co-founder and CMO at Antavo

[*https://www.marketsandmarkets.com/Market-Reports/loyalty-management-market-172873907.html](https://www.marketsandmarkets.com/Market-Reports/loyalty-management-market-172873907.html)

CHAPTER 1

The Current Loyalty Program Landscape

Global Customer
Loyalty Report
2022



High Satisfaction and a Desire to Reach New Heights

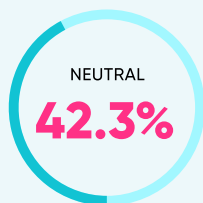
Over the years, loyalty programs have become standard practice across all industries, from travel to fashion, and even banking. But despite the growing adoption rate, loyalty programs don't always live up to the expectations. So, as the first step to establishing the current state of the loyalty landscape, we wanted to gauge the satisfaction of brands that are currently running a loyalty program.

Survey responses paint an interesting picture, with significant implications for the future: **56.0% of program owners are satisfied or very satisfied with their loyalty program**, claiming that their existing rewards program contributes to sales, delivers great ROI, and is popular among customers. On the other hand, **42.3% of respondents reported neutral satisfaction**, stating they could be getting better results.

Respondents' level of satisfaction with their current loyalty program.



Respondents who stated that their loyalty program contributes to sales, delivers great ROI, and is popular among customers.



Respondents who think their loyalty program could deliver better results.



Respondents who are dissatisfied with their loyalty program.

71.6%
of respondents claimed that they are very likely to revamp their loyalty program.

In another question, respondents were asked how likely they were to revamp their existing loyalty program in the next three years. The majority of the respondents, **71.6%, claimed that they are "likely" or "very likely" to do so.**



Actionable Insights

There are two major takeaways from how program owners rated their satisfaction:

1. For one, it proves that loyalty programs do indeed provide value to some degree, as only **1.7% of respondents were directly dissatisfied with their existing program.**

2. More importantly, however, even companies that are generally satisfied with their existing program are looking for ways to update it, judging from the fact that **71.6% of companies are likely or very likely to revamp their program in the next three years.**

So how can you act based on this insight?

Plan your future loyalty program with flexibility and expandability in mind. Use a technology that can be updated and extended when new needs arise. Consider technology that offers a modular structure, where new capabilities can be easily added or removed. This will allow you to create new iterations of your program based on customer feedback or competitor analyses.

Be prepared to improve your loyalty program constantly. Remember, there's no such thing as a "finished", or "complete" loyalty technology and strategy. Any platform can always be improved or streamlined and strategy can be adapted to changing customer needs. Make sure that your technology can be scaled up during peak periods, that day-to-day management is easy on your employees, and that you continuously listen to customer feedback.

PwC PERSPECTIVE



Maciej Kroenke
Partner at PwC



Covid-related market turmoil has brought even more attention to the topic of customer loyalty. Brick-and-mortar retailers, as well as a number of eCommerce retailers, focused their activities on better understanding and „loyalizing” the customer base. The importance of such actions has been strengthened by an emerging segment of nomadic customers, who shifted their preferred providers due to numerous restrictions. An inflow of new customers created an opportunity to loyalize the base in some verticals, while an outflow observed by other verticals required rapid and targeted win-back strategies. **Overall, the role of classic loyalty programs has evolved towards a customer activation hub.** A significant amount of experience was gathered and it is expected that loyalization will remain on CEOs’ agendas for a long time to come.

Focus on CX

As the number of loyalty programs on offer kept on growing, retailers faced a new challenge: differentiating from the competition and maintaining customer engagement. The key response to that dilemma has been to improve the loyalty-driven customer experience. Thanks to a **focus on improved customer journeys and in-store privileges** (such as faster checkout), improved functionalities, as well as access to exclusive offerings, overall customer engagement has grown. However, such results have been achieved only by merchants that have constantly developed their loyalty programs and rapidly adjusted to evolving customer needs.

Personalization

The future of loyalty programs seems to be well-defined. Besides continuous improvement, customer experience **will be mostly focused on personalization.** Personalization is or will be related both to well-known offer targeting as well as the targeting of inspirations. In particular, the second application is expected by customers and, if executed well, will play a major role in driving loyalty and developing customer habits.

What's the Motivation for Running a Loyalty Program?

The next step towards understanding the current loyalty program landscape is to evaluate why companies have opted for loyalty programs. Organizations may introduce a rewards program for a number of reasons, such as to build stronger relationships with customers or collect data.

We've **outlined the five most prominent motivating factors** for companies that already have a program, and for those that plan to introduce one in the near future.

For companies that already have a loyalty program, increasing engagement among customers is the number one priority.

That is followed by the need to increase sales, either by boosting purchase frequency or average order value. Another important goal is to have the ability to **leverage loyalty data**, as well as be able to efficiently collect such data. Last on the list (but important nonetheless) is the desire to enhance the customer experience.

The most important reasons companies offer a customer loyalty program

Companies offering a loyalty program



Companies that plan to introduce a loyalty program within the next two years



For respondents whose company will launch a loyalty program within the next two years, better customer engagement also ranked highest on the list. However, for would-be program owners, the next priority was to **improve the experience**, followed by **increasing customer satisfaction**. Organizations that are in the process of planning or launching a loyalty program are also concerned with **personalization**. Last but not least, these organizations want to **increase revenue**.



Actionable Insights

The results clearly show a paradigm shift in how loyalty programs are perceived. Their purpose is no longer just to reward purchases, but also to increase customer engagement, which signifies a deeper understanding of how customer relationships work in the 2020s.

1. Experiences matter.

Today's customers turn to brands for experiences and a connection, not just to save money, so ensure your rewards reflect that.

2. Collect and leverage data.

Utilize your loyalty program to its full extent, not just to reward purchases, but also to incentivize the collection and use of customer data.

3. Increasing value:

Existing program owners can get more value by using the program to boost customer lifetime value or by leveraging loyalty technology to collect data and then use those loyalty insights for personalization.

Companies that are planning to launch a loyalty program in the coming years are clearly doing it to improve their relationship with their customers and to build a like-minded community.

These companies ranked customer satisfaction and the need for personalization higher than generating increased revenue.

Such a response could signal a new generation of businesses that find emotional bonds more valuable than purely transactional engagements.

For future loyalty programs, ROI will be achieved through strengthening relationships in the long run and nurturing loyal customers to increase lifetime value.

How the Challenges of Owning a Loyalty Program Changed After 2020

The Covid-19 pandemic has forever altered the customer reality as we know it.

Therefore it was imperative to investigate how company challenges shifted after the events of 2020.

Doing so can provide companies a roadmap on what areas their technology and loyalty strategy should focus on. Moreover, a greater understanding of the most pressing loyalty challenges can help other companies identify their own pain points, and use that knowledge to drive their future loyalty program accordingly.

For Program Owners, Challenges Revolved Around Experiences and Engagement

To determine a starting point for the analysis, survey participants who already own a loyalty program were asked about the top loyalty challenges they faced at the beginning of 2020.

Many of these challenges correlate with loyalty program owners' number one driver: to increase customer engagement. Loyalty marketing and omnichannel experiences can lead to higher engagement, but companies were struggling to execute due to technology & strategy constraints or a lack of data & allocated resources.

Top loyalty marketing challenges for program owners at Q1 '20

#1 Integrating loyalty marketing into the company's main strategy. Because loyalty programs involve multiple departments other than marketing (including IT and finance), the process of executing the loyalty marketing plans was found to be slow and difficult.

#2 Technology burdens make it hard to keep up with innovation. Changing customer expectations have brought technical challenges along with them. eCommerce technology is rapidly evolving and it's hard to keep up with the latest tech trends, especially if an organization has just begun digitizing.

#3 Offering a seamless omnichannel loyalty experience. Simply focusing on all major communication channels doesn't automatically equal an omnichannel experience. Retailers also struggle with seamlessly connecting the various channels, so that customers can earn & burn points more easily.

#4 Limited internal resources and expertise to manage the program. Running a loyalty program requires a dedicated team and a budget. Failing to provide the necessary training, technology, freedom and funding for managers who run the program put a damper on its overall success.

#5 Collecting and using customer data. Being able to gather and then use data to fuel segmentation and personalization was another important organizational challenge that will continue to influence the future of marketing and customer loyalty.

Top loyalty marketing challenges for program owners in 2021-2023

#1 Offering a seamless omnichannel loyalty experience. This concern makes a lot of sense due to the eCommerce hyperjump and the shifts in retail caused by COVID-19.

#2 Integrating loyalty marketing into the company's main strategy. Integration will most likely remain a challenge in the foreseeable future. However, other challenges, like omnichannel, seem to become more pressing.

#3 Collecting customer data. This challenge was ranked lower before 2020, but recent changes in privacy data legislation and restrictions on third-party data (such as the phasing out of cookies) may explain the urgency to collect zero- and first-party data.

#4 Offering experiential rewards. Experiential rewards are an essential part of emotional loyalty programs – a topic that will be thoroughly explored in the next section of this report. The fact that this was chosen as a top challenge for the future suggests that interest in this reward type will continue to increase.

#5 Gamification. Gamification is not new to loyalty programs, however, advancements in technology and changes in customer expectations have given this concept new traction.

The need for capabilities that allow a seamless omnichannel loyalty experience have clearly taken precedence, becoming the biggest focus for the large majority of organizations. Interestingly, technology burdens have stopped being a major concern. Instead, interest has shifted towards gathering and utilizing customer data, which remains a major focus for loyalty program owners.

Summary of the Top Loyalty Challenges

	Challenges in Q1 2020	Challenges in 2021-2023
	Integrating loyalty marketing into the company's main strategy	Offering a seamless omnichannel loyalty experience
	Technology burdens made it hard to keep up with innovation	Integrating loyalty marketing into the company's main strategy
	Offering a seamless omnichannel loyalty experience	Collecting and using customer data
	Limited internal resources and expertise to manage the program	Offering experiential rewards
	Collecting and using customer data	Integrating gamification mechanisms



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Here are a couple of action items to keep in mind in 2022 and 2023 as a loyalty program owner, so you can tackle these challenges in time.

- **Use technology to create a seamless omnichannel experience.** A loyalty program by itself does not guarantee an omnichannel experience. Instead, loyalty programs improve upon the existing omnichannel strategy by adding rewards and incentivizing customers to familiarize themselves with new technologies, such as card-linked offers, virtual dressing rooms, and NFC payment.
- **Focus on data from the very beginning.** While working on the concept of your loyalty program, consider how it can be used to better understand customers and to provide a better, more personalized experience. Make sure that the program is built in a way that actively supports your company's data strategy.
- **Gamification can be a game-changer.** Customers love gamified features. Adding game-like elements not only spices up the experience, but also provides new ways for customers to engage with the program beyond making purchases. Even if you don't wish to launch your MVP with gamification, you should absolutely consider adding it later on.

Future Loyalty Program Owners Worry About Loyalty Marketing and Omnichannel Experience

Companies that are in the process of implementing their loyalty program, or are planning to do so in the next two years were asked what they foresee as their most important loyalty marketing challenges over the next three years.

#1 Integrating loyalty marketing into the company's main strategy. Because loyalty marketing is key to achieving high engagement numbers, an upcoming loyalty program needs to align with the company's strategy, otherwise it won't gain traction.

#2 Need for a seamless omnichannel loyalty experience. Companies seem to feel more pressure to engage with customers across all possible channels. As a result, this cross-channel experience is on the road to becoming a basic requirement in the future, rather than a differentiator.

#3 Limited internal resources and expertise to develop and run the program. Building a loyalty program is an upfront investment of time and budget, while it takes time for the ROI to crystallize. Therefore it's a challenge to get approval for the resources if the effects are only shown in the long run.

#4 Collecting and using customer data.

Freshly launched loyalty programs cannot do personalization right away, as brands need time to collect data. This is why they need an effective strategy to incentivize data sharing, so the gap can be closed as quickly as possible.

#5 Building a solid business case for future loyalty programs. Upcoming loyalty programs have to make a good impression immediately at launch, which is why having a solid business case is vital. Consulting with third-party technology providers, agencies and loyalty experts can help companies meet this challenge.

75% of respondents

whose companies are planning to launch a loyalty program see the integration of loyalty marketing into the company's main strategy as a challenge.



75%

Strategy and program management are major concerns for future program owners, as they stress over whether they have the manpower and expertise to efficiently run the program once it launches. Businesses also want to ensure that the loyalty program is an authentic part of the brand strategy from day one, which is why they should treat loyalty programs as a company-wide project.



Actionable Insights

As an upcoming loyalty program owner, if you're worried about a lack of resources or expertise when it comes to developing a loyalty program, remember that there are generally three approaches to managing loyalty technology:

- 1. Build it yourself.** If you're worried about internal resources and the lack of experience managing a loyalty program, chances are high that building, maintaining and evolving the framework internally will be extremely time- and energy-consuming.
- 2. Hire a development agency.** Hiring an agency to do the job for you is the most convenient, but it adds to the cost of the program. Also, despite hiring an agency, you still need to make sure to have a clear plan for program maintenance and future features.
- 3. Use a third-party solution from a loyalty technology vendor.** This may come with an initial investment from employees, who will need to learn how to operate the loyalty platform, but in the long run, your team can exercise more creativity and control over their work.

Loyalty Programs: an Effective Crisis Management Solution

The Covid-19 pandemic had lasting effects on businesses all over the world. Throughout 2020, retail businesses and the travel industry faced increasing difficulties, while many online businesses saw a huge influx of new customers with higher demands. Amidst these varying customer retention and acquisition challenges, loyalty programs have been recognized as an effective crisis management solution.

To uncover the exact role and importance of loyalty programs in the recent global crisis, survey respondents were asked how they responded to the crisis regarding their loyalty strategy. **60.5%** of respondents answered that they had either increased or significantly increased development efforts for their loyalty strategy.

These numbers indicate a trend among companies where, in a time of crisis, many saw loyalty programs as a valuable tool, and relied on them to remain competitive, instead of writing them off as a sunk cost.

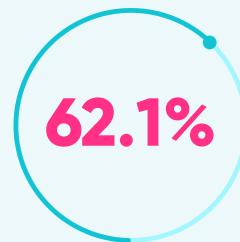
Impact of Covid-19 crisis on the development of loyalty strategy



For **more than half** of the respondents, the **development of their loyalty strategy** was impacted during the global pandemic.

For an even deeper understanding, loyalty program owners were asked to share what effect their reward program had during a crisis. According to their responses, **62.1%** reported that their loyalty program has helped keep their customers engaged during the Covid-19 crisis.

Impact of loyalty programs on the level of customer engagement during the Covid-19 crisis



62.1% of respondents reported that their loyalty program has **helped keep their customers engaged** during the Covid-19 crisis.

Loyalty programs help to keep customers engaged during a crisis, therefore companies who are not „mature” in loyalty should consider investing in their loyalty strategy to increase customer engagement and be prepared for the next crisis.

60.5% of respondents stated that they **either increased or significantly increased development efforts for their loyalty strategy.**

The 25 million member interactions recorded by Antavo's Loyalty Management Platform provide additional context on what loyalty program features and capabilities proved to be useful during the crisis. It turns out that tiers played an important role in sustaining interest among loyalty program members, especially for high-value customers. According to the data, **through Covid-19, members in a higher tier level had a 29.6% higher visit frequency** than members in lower tiers.

Up until now, it's clear that brands have put a large emphasis on loyalty programs to manage customer engagement during the global crisis. As for the future, the survey asked respondents to **map out the most important marketing initiatives for 2022**, to determine whether the increased development in loyalty strategy was temporary, or whether companies would return to their pre-Covid loyalty strategy.

Loyalty marketing ranked third on companies' priority list, following digital transformation and E-commerce, but ahead of email marketing, social media marketing and stronger branding.

Most important marketing initiatives in 2022

-  1. Digital transformation
-  2. E-commerce
-  3. Loyalty marketing
-  4. Social media marketing
-  5. Branding
-  6. Email marketing
-  7. Content marketing
-  8. Influencer marketing
-  9. Trade marketing
-  10. Events

Loyalty marketing is among the top three marketing initiatives that companies plan to prioritize in 2022, compared to the period before the Covid-19 crisis.



Actionable Insights

The biggest takeaway is that, during any form of crisis, customers are more sympathetic to the common cause, and they're looking for their favorite brands to act accordingly.

- 1. Show empathy.** During a large-scale crisis, the motto for your rewards program should be to “serve, not to sell”, so that customers won't feel exploited.
- 2. Customers will remember brands that were customer-centric.** During a crisis, customers expect meaningful help, and charitable acts will be signal-boosted on social media.
- 3. Have a strong data-driven loyalty strategy.** Build engagement with members using behavioral data, so when the next crisis hits, it will be easier to retain them.

EXPERT PERSPECTIVE



Attila Kecsmar
CEO & Co-founder of Antavo

“The greatest virtue of a loyalty program is that it changes customer behavior and generates loyalty. If you're already running a loyalty program when a global crisis hits, you most likely already have an engaged and invested audience you can lean on. Customers who are halfway to the next tier, or are sitting on unspent points are unlikely to abandon your brand.

And in regards to crisis management and loyalty programs, we shouldn't forget about the power of data, either. If you can leverage customer data to build a more personal and emotional relationship with customers, it's more likely that the negative impact of the crisis will be lower on your business, because you can more effectively prevent churn, stay relevant, and rebound faster once the situation normalizes.”

Investing In Loyalty:

Budgeting, Strategy & Technology



Expecting a High ROI

Loyalty programs are capable of driving a multitude of business KPIs, from the rate of engagement to acquisition and retention. But **can loyalty programs be an effective revenue generator**, or does their value lie only in other areas? To answer this question, we asked companies across the globe about their loyalty ROI, how they perceive loyalty programs as a business investment, and what kind of results they have seen.

First, respondents were asked whether their loyalty program was perceived to be more of a cost center or a revenue center by upper management. In the past, loyalty was long seen as a cost required to retain customers. For instance, businesses perceive loyalty points just as a form of liability. Nowadays, however, the success of high-caliber programs from companies like Starbucks and Sephora indicate that **loyalty programs can be — and are — profitable**. Plus, rewards programs can run at reduced costs by financing rewards through partner networks, or by adding optional subscription elements.

59,5%

of participants claim that their decision-makers view rewards programs as a revenue center.

Survey responses indicate an awareness of this reality, with **59,5% participants claiming that their decision-makers view rewards programs as a revenue center**. This means companies generate more incremental revenue than what it costs them to run the loyalty program. Incremental revenue can come from member activities (spending more, visiting more often, increased share of wallet, spending on subscriptions) and financing rewards through partners.

How long does it take to see a positive ROI?

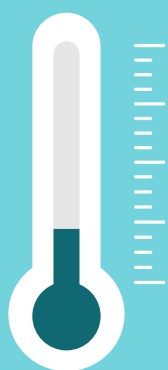
It's possible that decision-makers start out perceiving loyalty programs as a cost-center, but as the program matures and your audience grows, running a loyalty system turns into a revenue center. Companies can expect a well-designed program to have positive returns within two to three years, depending on upfront costs, the feature set, and the types of rewards offered.

Another survey question involved the size of the marketing budget. We learned that, on average, organizations offering a loyalty program **allocate almost a quarter of their total marketing budget** to loyalty program management and CRM.

22.8%
of total marketing budget is allocated to customer loyalty program management and CRM.

This illustrates a high-level commitment to marketing loyalty-related features, campaign, and customer relationship management. Such a commitment can also contribute to the long-term success of the program.

Loyalty marketing investment



22.8%
of total marketing budget

On average, companies with a loyalty program allocate 22.8% of their total marketing budget to customer loyalty program management and CRM.

Speaking of long-term success, survey responses indicate that many companies feel it important to measure the return on investment of their loyalty program. In fact, **67.2% of respondents offering a loyalty program reported that their organization measures the ROI of loyalty.**

And they seem to be receiving favorable results, as **93.1% of those who do measure ROI, said they had a positive ROI.** This suggests that loyalty programs are indeed a worthwhile investment.

Loyalty return on investment

67.2% of respondents that offer a loyalty program reported that their organization measures the return on investment (ROI) of loyalty.

93.1% of companies that offer a rewards program and measure return on investment have a positive ROI.

Tiers or no tiers: what is the impact on ROI?

The survey answers also outlined an interesting trend regarding the return on investment for one specific loyalty program feature: tiers. When asked about the revenue generated compared to the overall spend on loyalty, **organizations with a loyalty program that includes tiers reported a 1.8X higher return on investment** compared to those who don't offer tiers. These findings indicate that audiences clearly prefer certain loyalty program structures over others. Therefore picking the right program type can add further value and enable the program to generate additional revenue.

Respondents whose loyalty program includes tiers

reported a higher return on investment than respondents whose loyalty program does not include tiers (including secret tiers).

1.8X

higher ROI reported by companies offering tiers.

2.1X

more spend on average by customers in higher tiers.

EXPERT PERSPECTIVE



Mike Capizzi

Loyalty Marketing Expert and Director of Education, The Loyalty Academy

“Loyalty is having a very solid impact on companies. People have realized that traditional forms of marketing, mass-media especially, which have always been very expensive are no longer delivering. The executive-level audience is realizing that if they increase their investment in loyalty it will pay big dividends.”

Loyalty marketing is measurable marketing. You can see exactly what's working and not working and, hopefully, begin to understand the reasons behind the results. Such as what direct correlation in the measurement causes loyalty to take off, and why executives are increasing their budgets for loyalty marketing.”

Current Budget Planning Trends for Loyalty Programs

Companies are investing in customer loyalty. According to our survey, of respondents whose company offers a loyalty program, **81.9% plan to increase or significantly increase their investments in customer loyalty** over the next three years.

The interest in funding bigger and better loyalty programs demonstrates a trust in the practice, underlined by previous statistics, which show that the majority of companies are satisfied or very satisfied with their loyalty program and that **9 out of 10 companies who measure ROI have a positive ROI**. However, with **71.6% of respondents looking to revamp their program**, existing program owners have expressed a desire to get more value from their program.

Respondents said they are most likely to invest in loyalty by including more personalization options, upgrading or revamping their loyalty program and underlying technology and offering better rewards and benefits, making the loyalty program experience more emotional.

Intention to invest in loyalty:

81.9%

of respondents plan to increase or significantly increase their investments in customer loyalty over the next three years.

Most important investment in loyalty in the next three years:

29.3%

Personalization

25.0%

Implementation or upgrade of marketing technology

14.7%

Rewards and benefits, and revamp program (both equal)

When respondents were asked how they would use additional budget allocated to their loyalty program, the key words were:

- Experiential/emotional program
- Technology

EXPERT PERSPECTIVE



Mike Capizzi

Loyalty Marketing Expert and Director of Education, The Loyalty Academy

“When I’m asked what areas of loyalty companies should be investing in, I always say: technology first. If you don’t have good technology today you’re going to fall behind. Really good technology will help you facilitate engagement, and it will leave a trail of understanding. It’s a bright future for loyalty marketing. Make sure you’ve got really good technology to enable the engagement and the communication.”

Shifting Towards a More Emotional Loyalty Model

Emotional loyalty and personalization have been recurring themes throughout this chapter. In short, **emotional loyalty is a deeper connection**, which is formed when every communication, action, and input customers receive from a brand makes them feel recognized and important.

Emotional loyalty can lead to:

- Higher engagement rates among members
- Increased app usage
- Positive word-of-mouth on social media
- A boost in customer lifetime value

When asked, **20.7% of respondents offering a loyalty program classified their program as more emotional than rational**, which means the majority of existing loyalty programs still follow the rational, transaction-based model. However, when a similar question was asked from companies that are planning to launch their loyalty program in the next two years, **53.6%** of respondents specified that their program would be more emotional than rational.

- Early access clubs, secret VIP tiers, and members-only benefits reserved for the most dedicated customers
- Privileges that make the shopping journey smoother, such as private concierge and dedicated customer support
- Early access to new products
- Community-driven features, including insider forum access and social media takeovers
- Input opportunity for product and service development

A shift towards emotional loyalty

20.7% of respondents with an existing loyalty program classify their program as more emotional than rational.



53.6% of respondents who plan to launch a loyalty program in the next two years envision their future loyalty program as more emotional than rational.



Emotional loyalty has two easily identifiable components: personalization and experiential rewards. Here are some examples and strategies that characterize an emotional loyalty program:

- Experiential rewards that create memorable moments, such as NFT art and personalized products
- VIP events such as backstage passes and exclusive cocktail nights

Experiential rewards in particular are a customer-centric asset. When current loyalty program owners were asked about their future plans, **65.2% of those not offering experiential rewards stated that they plan to introduce this feature** within the next three years. As for companies who plan to offer a loyalty program in the next two years, **55.4% reported that their loyalty program will offer experiential rewards**. These numbers indicate a likely uplift in the overall adoption of

Intention to offer experiential rewards in the next three years

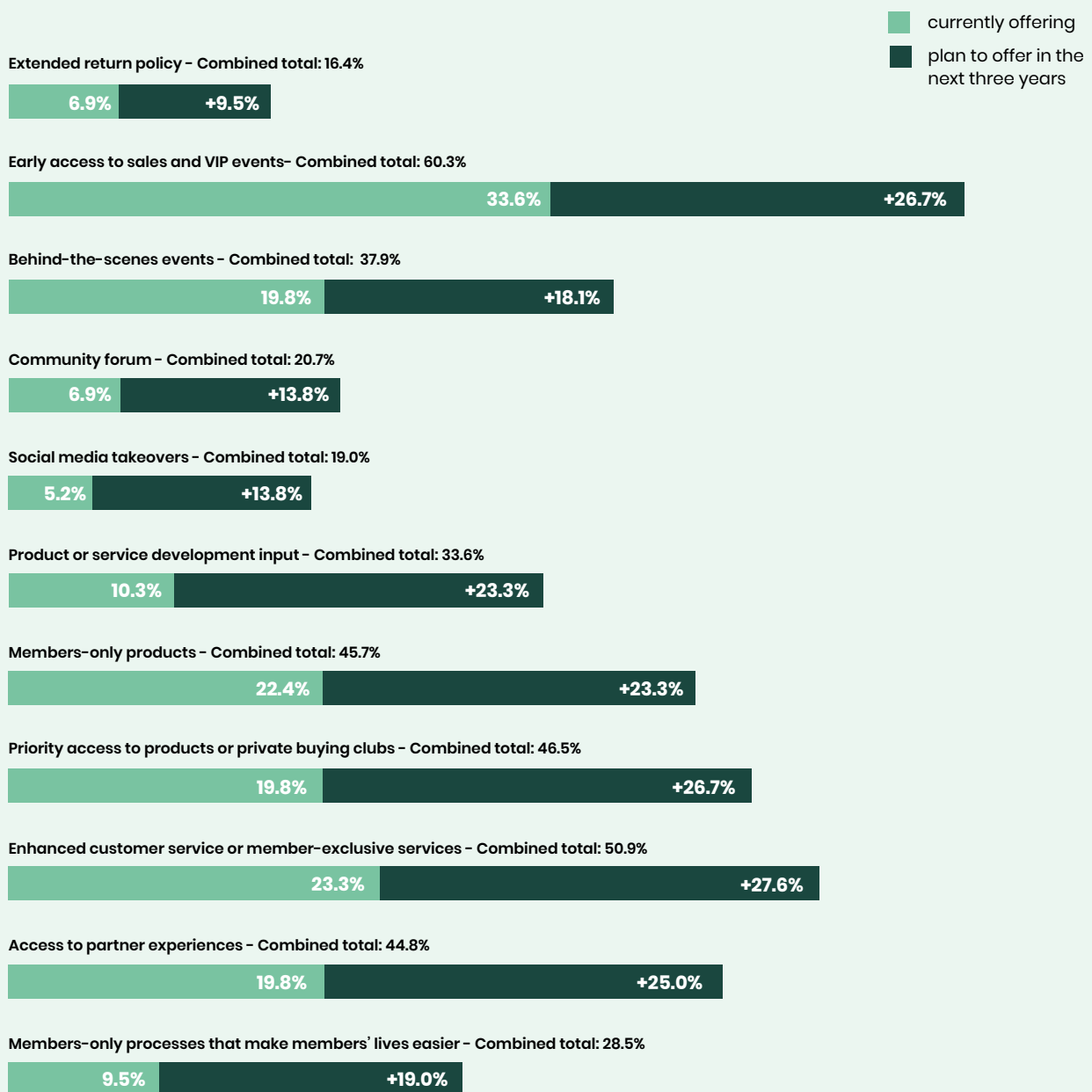
65.2%



65.2% of respondents that have a loyalty program, but do not yet offer experiential rewards, plan to start offering them in the next three years.

To get a more accurate trajectory of where the future of emotional loyalty programs is going, survey participants were asked whether they offer specific experiential rewards, and if not, if they were planning to do so in the next three years.

Experiential Rewards Adoption Rates



Experiential rewards are generally favored, oftentimes doubling the adoption rate of other reward types.

- **Privilege-based rewards**, like early access to sales, members-only products, and VIP customer support are already popular, but their adoption is expected to rise even higher and potentially propel these types of rewards into the mainstream.
- **Benefits** like extended return policy, community forums and social media takeovers are seemingly less popular, but the concept still holds a lot of potential.
- One of the most prominent forecasted jumps in adoption belongs to **partner experiences** (such as sporting goods shops offering tickets to football games, an airline offering hotel upgrades).
- The increased adoption in partner experiences signifies that **companies plan to be more creative** when it comes to creating reward experiences and leveraging partnerships, which can increase value at a lower cost.

Expect to see more emotional loyalty programs

These statistics forecast a paradigm shift for loyalty programs. While the current landscape is still dominated by rational programs, existing program owners have made it clear that they would like to make their programs more emotional and offer more experiential rewards.

Companies planning to launch a loyalty program in the next two years echo this sentiment: **53.6% of respondents envision their program to be more emotional than rational.** This data indicates that in two years, we should see an increase in the number of emotional programs, and this number will most likely continue growing.



Actionable Insights

If you're looking to create a more emotional loyalty program experience, plan for the long term and don't just focus on immediate ROI.

- **Plan for emotional and experiential rewards** that match your business values and your audience's needs and expectations
- **Make sure your technology is capable** of executing these sophisticated reward scenarios
- **Create seasonal campaigns** where members can donate points to charity, use a sports tracker integration to reward them for working out, help them achieve personal goals, or award bonus points for bringing back old clothes. These are just a few examples of how to show appreciation to your customers outside of the buying cycle.

Finding the Most Fitting Loyalty Technology

Survey results show there are two components of modern loyalty programs that companies wish to invest in: strategy and technology – both of which are components that survey respondents ranked high in terms of budget allocation. Regarding technology, companies can either use in-house technology or rely on a third-party solution by a dedicated loyalty technology vendor.

Level of satisfaction with loyalty program managed in house vs. by a third-party vendor



49.2%

49.2% of respondents whose loyalty program is managed by in-house technology are satisfied or very satisfied with their loyalty program.



63.2%

63.2% of respondents whose loyalty program is managed by a loyalty technology solution vendor are satisfied or very satisfied with their loyalty program.

3rd-party or In-house Loyalty Technology: Which Is More Popular?

According to the survey results, the two approaches to technology are evenly matched, as **49.1% of loyalty programs are managed by a loyalty technology solution vendor and 50.9% of loyalty programs are managed by in-house technology.**

However, when it comes to satisfaction, there is a significant difference. **49.2% of respondents whose loyalty program is managed by in-house technology are satisfied or very satisfied** with their loyalty program. Meanwhile, **63.2% of respondents whose loyalty program is managed by a loyalty technology solution vendor are satisfied or very satisfied** with their loyalty program.

In both cases, satisfied or very satisfied means that the program either contributes to sales and many customers take part in it or the program delivers a great return on investment and customers love it.

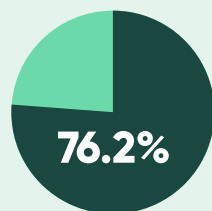
The proportion of organizations that currently opt for third-party loyalty vendors is forecasted to be similar for future loyalty programs as well. When asked whether companies would manage their loyalty program with in-house technology, third-party technology, or undecided, **44.6% selected third-party technology from a dedicated vendor, 21.4% indicated they wanted to run the program in house, and 33.9% were undecided.** Such results demonstrate a general trust in third-party software.

Existing loyalty program owners who favored a third-party loyalty technology solution were asked about what they value the most in their loyalty technology.

Their top values were:

1. Has omnichannel capabilities
2. Trusted technology
3. Fully customizable

Reduce dependency on IT teams



76.2% of respondents whose company offers a loyalty program or plan to launch a loyalty program in the next two years aim to equip marketing with the right tools and/or processes to reduce dependency on IT team

Detaching Loyalty Marketing Management from IT

Regardless of whether a company decides to go with in-house or third-party technology, the survey uncovered a general concern about the difficulty of operating the technology on a daily basis.

- **44.0%** of respondents with a loyalty program reported that the marketing team is very dependent on the IT team to manage the loyalty program.
- **76.2%** of respondents whose company offers a loyalty program or plan to launch a loyalty program in the next two years plan to equip marketing with the right tools and/or processes to reduce dependency on the IT team.
- **70.4%** of respondents whose company offers a loyalty program or plan to launch a loyalty program in the next two years agree or strongly agree with the fact that being able to set up loyalty rules without coding would be an asset for the company.

No-code technology: the key to user-friendliness

Companies in which the marketing team depends on IT to manage basic functions are more likely to revamp their loyalty program in the next three years. No-code technologies can be a possible solution, thanks to their descriptive, highly visual and oftentimes drag & drop interfaces.

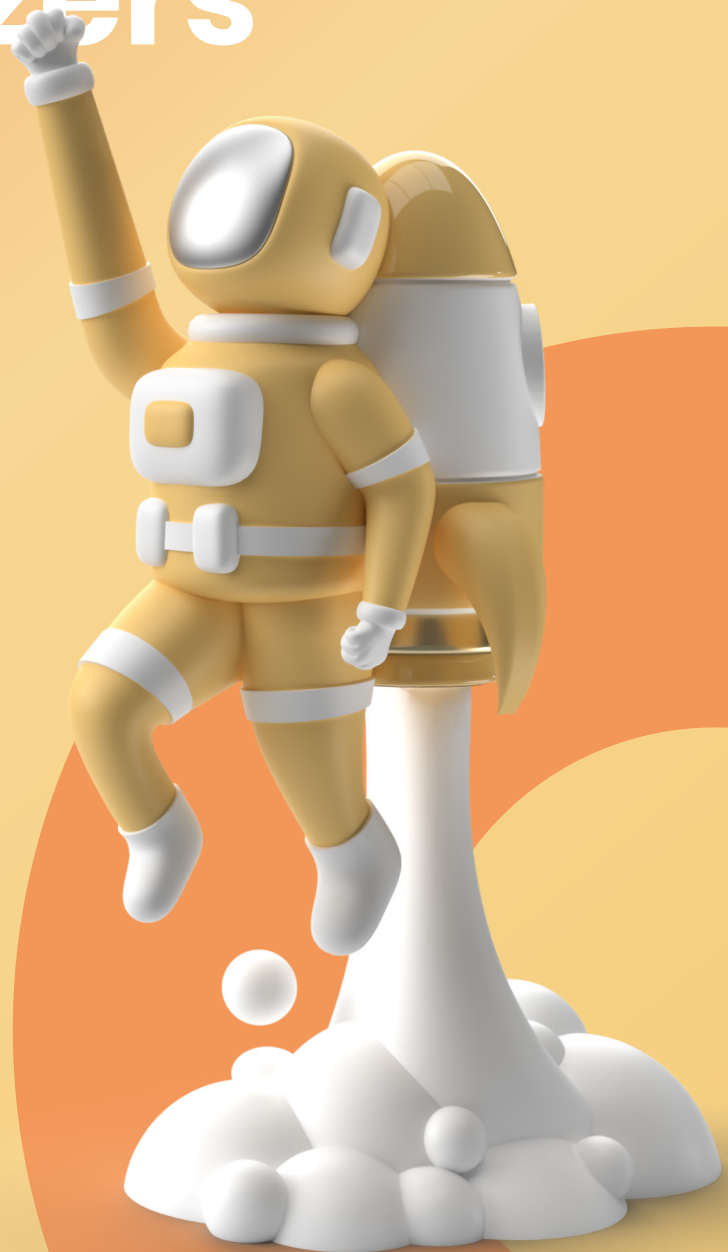


Actionable Insights

When it comes to loyalty technology, whether it be in-house or from a third-party vendor, you should consider the following:

- 1. Decrease the marketing team's dependency on the IT department.** No-code loyalty technology that utilizes a drag-and-drop interface and self-explanatory menus can be a huge help running the loyalty program without intensive IT support.
- 2. Create a clear technology roadmap.** Ensure your tech is ready for data collection and usage, has the omnichannel capabilities you require, and is customizable enough to add new features later.
- 3. Choose your technology wisely.** Assess the pros and cons of selecting a third-party vendor or building technology in house. Survey results show a higher satisfaction rate with vendors, but if you decide to go with third-party technology, make sure to pick a trusted vendor.

5 Iconic Loyalty Programs That Are Industry Trailblazers



Loyalty Programs that Inspire Others

Loyalty programs come in a variety of shapes and sizes, and each program should be built to fit the brand and to respond to the needs of its customers. However, there are certain companies that are revered as trendsetters on the market.

Companies can be trendsetters because:

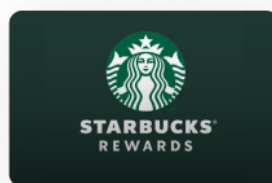
- They use existing technology, such as mobile apps, in an intuitive way
- They engage their members and build a community
- The reward experience is tailored to customers' needs

In order to identify **the most inspiring loyalty programs**, participants were asked to indicate any brands with a loyalty program that inspire them in their work.

Respondents provided insights on a long list of programs from across the globe, some local to specific regions, and others internationally renowned. Here, we'll take a deeper look at the five programs mentioned most.

Based on the answers, the 5 most inspiring programs are:

- 1 STARBUCKS
Starbucks Rewards
- 2 SEPHORA
Beauty Insider
- 3 AMAZON
Amazon Prime
- 4 NIKE
Nike Membership
- 5 LOBLAW COMPANIES
PC Optimum



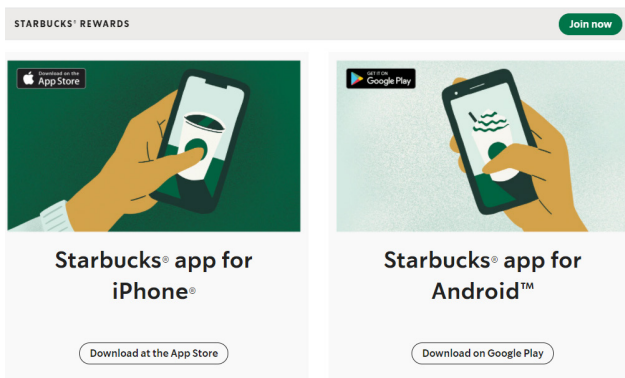
1

STARBUCKS Starbucks Rewards



Starbucks, the global multinational chain of coffeehouses, has made sure that engaging with their loyalty program is fun, convenient, and provides a unique experience. Easy ordering and endless choices are only a part of their rewards.

Their mobile app, which launched exactly 10 years ago, also plays a very important role in the company's loyalty program.



Starbucks Rewards also adds a hint of personalization by letting customers choose between several food and drink variations in each gift bracket.

- Members earn two stars for every \$1 spent using either the mobile app or registered gift card.
- There are five different reward categories. Each category includes a new freebie depending on the number of stars customers have. At the top of the pyramid is the 400-star offer: an enticing signature cup.
- Participants can also look forward to a birthday treat and complimentary coffee and tea refills.
- Members have coffee at the tip of their fingers thanks to the Starbucks Mobile App, which, among other features, lets customers order ahead and customize drinks.
- Members can use the app to skip the wait, see if they have rewards at their disposal, and learn how to get bonus stars.

This description was created based on publicly available information without the contribution of Starbucks.
Image Source: <https://www.starbucks.com/rewards>. Details of the loyalty program might change over time.

Lessons to Learn

With the surge of interest in online shopping, it is extremely important for brands to have a well-designed app that makes it easy for customers to connect.

- 1. Mobile apps enable your brand to communicate directly with your customers.** They're a gateway to revolutionizing both the online and offline shopping experience. Apps help keep your company on customers' minds at all times. Consistently staying engaged with your rewards program helps boost brand loyalty.
- 2. Customers love effortless and personalized experiences.** A mobile app is a great way to achieve exactly that. With a multi-purpose app that features loyalty, gamification, payment and service capabilities, companies can retain customers more effectively. Meanwhile apps help collect relevant data about customer their buying behavior.
- 3. Touchless solutions have gained even greater traction.** Following the pandemic, touch-free solutions — where people can sign up, scan QR codes, or even use contactless payment through the app — will help you earn bonus points with your customers.
- 4. Mobile apps also make customers' lives easier through quality-of-life features.** Apps unlock new possibilities in terms of gamified customer experience, deepening loyalty while entertaining customers, and building new habits. In-app games grab customers' attention and are a fun, engaging way to build anticipation.

STARBUCKS[®]
DELIVERS

Delivery or Pick Up at store
Order via the app,
earn Stars and redeem
your favorite beverage.

Order now!

The advertisement features a green background with a white Starbucks logo and the word 'DELIVERS' in green. Below the logo is an illustration of a person on a green scooter carrying a Starbucks cup. To the right, there are several green stars of varying sizes. At the bottom right, there is a white button with the text 'Order now!' and a small illustration of a hand holding a smartphone displaying the Starbucks app interface.

With their mobile app, Starbucks creates a seamless customer experience with several useful features, such as no-delay drink orders.

This description was created based on publicly available information without the contribution of Starbucks.
Image Source: <https://www.starbucks.com/rewards>. Details of the loyalty program might change over time.

2 SEPHORA Beauty Insider



Sephora, the French multinational beauty-retail concept, is a leader in prestige omni-retail. The company’s purpose is to create a welcoming shopping experience and inspire fearlessness in their community. Their rewards program, Beauty Insider, is a benchmark on how to build a next-gen loyalty program with exciting features.

From early access to birthday rewards and tiers, Beauty Insider demonstrates that modern loyalty programs should go beyond simply earn & burn logic.

2020 Beauty Insider Benefits
All members earn 1 point per \$1 spent.

Savings	INSIDER Free to join	VIB Spend \$350	ROUGE Spend \$1000
NEW Beauty Insider Cash ▶ <small>Apply 500 points for \$10 off your qualifying purchase</small>	●	●	●
Seasonal Savings Events ▶	10% off	15% off	20% off
NEW Free Standard Shipping ▶	\$50 min.	\$35 min.	No min.
Dollar Savings Offer ▶	\$15 off	\$20 off	\$25 off
NEW Points for Discount Events ▶	●	●	●
Rouge Reward ▶ <small>Exchange 2500 points for \$100 off your purchase</small>			●

Sephora’s loyalty program has three different tiers. Early access, exclusive experiences and free birthday gifts are just a few of the perks that members enjoy.

- Members of the Beauty Insider Community can share beauty advice, inspiration, news, join challenges, and recommendations with real people in real time.
- Sephora surprises members across all tiers with birthday gifts. These gifts include mini-sets from coveted brands.
- They offer online and offline community events for top members, where like-minded members can discuss makeup trends and be a part of exclusive product launches.
- Sephora Flash, an addition to their existing rewards program (only available in the US), is an annual shipping subscription, granting free 1-2 day shipping on every single order.
- Exclusive rewards, which are only available for high-ranking members, include free shipping or first dibs on upcoming products.

This description was created based on publicly available information without the contribution of Sephora. Image Source: <https://www.sephora.com/profile/BeautyInsider>. Information taken during October–November, 2021. Details of the loyalty program might change over time.

Lessons to Learn

Experiential rewards go beyond transactions to enhance the larger customer experience.

- 1. Moving beyond rewarding transactions.** Experiential rewards are a unique and customer-centric way to reward and recognize your best customers. Financial incentives are often essential, but they're no longer sufficient. Experiences, rather than possessions, are becoming more and more important for today's customers.
- 2. Know what your customers want.** The goal of offering experiential rewards is to exceed customer expectations. But in order to do so you need to understand what it is that they long for. If you don't know already, feel free to ask them.
- 3. Provide members with exceptional experiences.** Give program members truly unique benefits that they can't find anywhere else. This helps create a strong emotional connection with your brand. Experiential rewards inspire customers to participate in your loyalty program even more.
- 4. Exclusivity and convenience are the keywords.** VIP events, personalized products, celebrity meet and greets, and early access are all great ways to reward non-transactional activities as well. These rewards appeal most to higher-spend customers who are more interested in feeling special and being recognized.



Individual rewards of 750 points or more ship **FREE**. No merchandise purchase required.

Sephora's Rewards Bazaar has a wide range of reward categories, ensuring that every single member finds something they want.

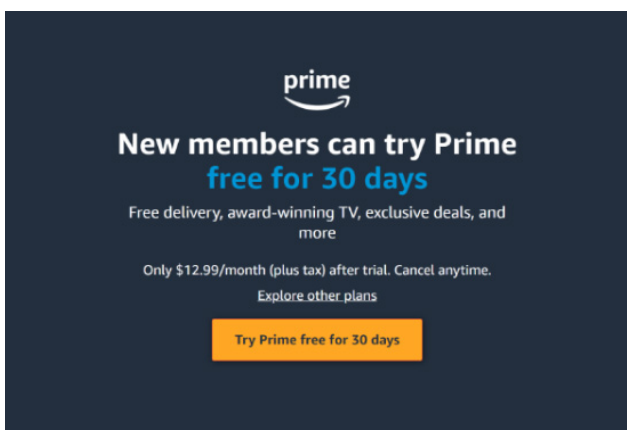
This description was created based on publicly available information without the contribution of Sephora. Image Source: <https://www.sephora.com/profile/BeautyInsider>. Information taken during October–November, 2021. Details of the loyalty program might change over time.

3 AMAZON Amazon Prime



Amazon, the world's leading e-retailer, is often referred to as "one of the most influential economic and cultural forces in the world". Its loyalty program, Amazon Prime, is considered a significant part of the company's great success. Amazon launched its subscription-based program in 2005, and since then it has become one of the world's leading subscription businesses.

The primary purpose of their paid membership program was to create loyalty between Amazon and its customers. The fundamental element behind their loyalty program's success is that members of Prime simply spend more money once they have enrolled.



Amazon Prime allows members-to-be to try their subscription loyalty program free for 30 days. During this time they get access to all the membership benefits.

- Shipping convenience: members can enjoy free next-day delivery with 100 million eligible items and no minimum spend threshold.
- Members can shop Prime Day, a one-day sale event, and take advantage of dozens of other benefits throughout the year, such as unlimited access to streaming services, exclusive prices, and savings.

Customers can shop not only on

- Amazon, but also buy groceries, listen to audiobooks, subscribe to Kindle Unlimited, and much more.

Amazon Prime offers several services, for

- instance Prime Student, which includes free six-month Prime membership to students, or Prime Video, which gives members access to original movies and TV shows.
- The 'No-rush shipping' option is for members who are willing to wait six business days to get their orders, instead of the standard two-day shipping that they are eligible for. In exchange, members earn rewards on future purchases or immediate discounts.

This description was created based on publicly available information without the contribution of Amazon. Image Source: <https://www.amazon.com/amazonprime>. Information taken during October–November, 2021. Details of the loyalty program might change over time.



Lessons to Learn

Subscription loyalty programs are ideal if you want to ensure a high ROI, but only work if you make the investment worth it for members through rewards and benefits.

- 1. Put a price tag on your loyalty program.** Subscription loyalty programs require customers to make some sort of upfront or recurring contribution to become members. One of the benefits of these programs is that the initial investment that members make fund them. This can add up to a significant amount of revenue in a relatively short time.
- 2. Offer immediate benefits in exchange for a fee.** The most important characteristic of subscription programs is that they enhance the reward experience. Since customers have paid for membership, they expect to receive great benefits that they can start using immediately. Also, these members are more likely to shop and want to enjoy the advantages to their fullest.
- 3. Express how much you appreciate your customers.** Fee-based membership programs are geared towards engaging your most valuable customers. By identifying your most committed members, you will be able to provide them with more special rewards.
- 4. Connect with your most dedicated audience at an emotional level.** In order to strengthen the bond with these members, you need to provide them with benefits valuable enough – something that will truly make their lives better, such as a 24/7 helpline or free express delivery.

The screenshot shows the Amazon Prime website interface. At the top, it says "prime" with the logo, "Free delivery, award-winning TV, exclusive deals, and more", and "Explore other plans". Below this is a section titled "More Prime benefits" with several icons and descriptions:

- Exclusive deals:** Prime Members save on thousands of items.
- Amazon Pharmacy:** Get free two-day delivery and save up to 80% on prescriptions.
- Prime Reading:** Enjoy hundreds of new books, magazines, and more each month.
- Amazon Photos:** Enjoy unlimited, full-resolution photo storage.
- Prime Wardrobe:** Try on clothes and accessories before you buy.
- Amazon Family:** Save up to 20% on diapers, baby food, and more.
- Prime Gaming:** Free games, exclusive in-game content, and a free Twitch channel subscription every month.

Amazon Prime has allowed the largest e-retailer in the world to offer immediate and valuable privileges that free reward programs could never afford.

This description was created based on publicly available information without the contribution of Amazon. Image Source: <https://www.amazon.com/amazonprime>. Information taken during October-November, 2021. Details of the loyalty program might change over time.

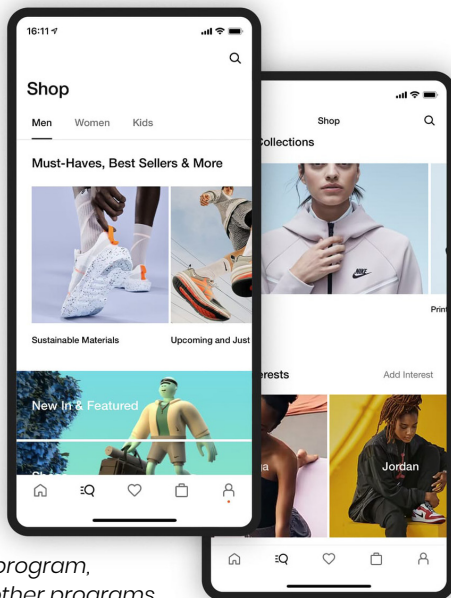
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NIKE
Nike Membership



Nike, the sportswear giant, has taken “community” to a new level with a series of member-exclusive apps aimed at runners, fitness enthusiasts, sneaker fans, and folks who just want to shop. Nike Membership gives customers access to inspiration, community, and exclusive Nike products. With its community, Nike aims to bring athletes together and encourage them to try new things and push themselves.

Nike Membership is all about relevant perks for like-minded athletes. It is a program that’s focused on exclusivity and a wealth of attractive benefits.



Nike’s loyalty program, unlike many other programs, doesn’t reward customers only for making purchases. Instead, members can earn points for participating in fitness activities and reviewing products.

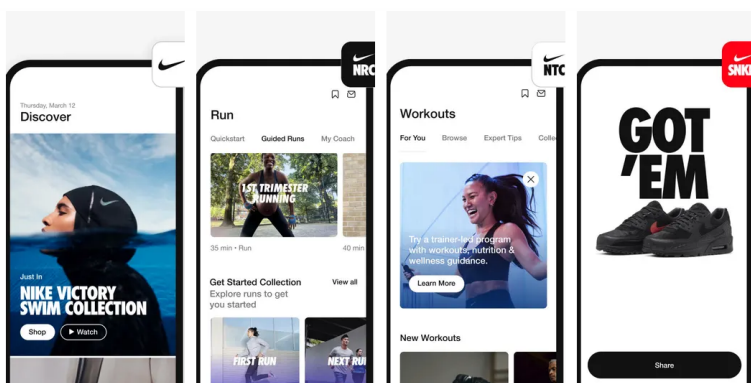
- Free delivery, 60-day wear tests, receipt-free returns, special offers, exclusive products, inspiring content and a sense of community are all part of the membership program.
- Partnerships & Events area, where Nike members can get special offers from partners, like Sweetgreen or Headspace, that help them build motivation and reach their goals. Through their app, members can also find local events to attend.
- Members receive access to product advice from real athletes and a huge line of members-only shoes, apparel, equipment and accessories.
- The membership program includes fitness apps, Nike Training and Nike Run Club, and their libraries of over 100+ workouts, and the SNKRS app, to stay on top of the latest sneakers drops.
- Tracking workout progress using Nike’s dedicated app rewards users with exclusive products.

This description was created based on publicly available information without the contribution of Nike. Image Source: <https://www.nike.com/membership>. Information taken during October-November, 2021. Details of the loyalty program might change over time.

Lessons to Learn

Providing customers with the feeling of belonging will be always appreciated. Being connected to like-minded people who share their passion and being engaged outside of the buying cycle, in their daily lives, strengthens their commitment to your brand.

- 1. Support brand building.** Companies can achieve this by associating their brand with a sense of belonging and attracting customers with specific interests. Create a community from a group of customers who have an emotional connection to your brand and are invested beyond what is being sold.
- 2. Get to know your customer better.** Fostering a small, targeted community with your loyalty program offers a solid way to seamlessly engage with customers and provide offers that really resonate with them. This way you will be able to personalize the customer experience better.
- 3. Loyalty communities are based on specific topics, interests, or values.** For example, rewarding customers for adopting positive financial behavior in a community centered around sustainable lifestyle. Being part of your customers' everyday lives is a great way to be a part of their lifestyle and reward them in the moment.
- 4. Reward customers for their hobbies.** Reward members for engaging with your brand's products and values post-purchase as much as you reward them for making repeat purchases. Bond with them over their interests. By dedicating a community to a popular product, lifestyle, or hobby you can foster an emotional connection with your customers.



Nike App Shop: Discover your personal guide to Nike
 Nike Run Club Run: Get motivated with Audio-Guided
 Nike Training Club Train: Break a sweat with over 160 workouts
 SNKRS Collect: Shop the latest sneaker drops

Nike's loyalty program caters to customers with different athletic and shopping interests. It was created to join all of the programs across their physical stores, online stores, and apps into one massive program.

This description was created based on publicly available information without the contribution of Nike. Image Source: <https://www.nike.com/membership>. Information taken during October-November, 2021. Details of the loyalty program might change over time.

5 LOBLAW COMPANIES PC Optimum



Loblaw Companies Limited, Canadian food and pharmacy leader, has innovated the grocery retail experience to better serve Canadians. Part of this innovation was their loyalty program, PC Optimum, which was created through the merger of a grocery and a pharmacy loyalty program. Their coalition loyalty program allows customers to earn points based on specific purchases at multiple stores.

The popularity of the loyalty program lies in the simple redemption process and huge network of affiliate retailers.

Rewarding your everyday
The PC Optimum program tailors your rewards to match the food and products that you buy most.

Get more value on your essentials

Earn rewards on the road

Treat yourself to something special

- The loyalty program tailors customers rewards to match the things that they buy most.
- Members earn points for almost every dollar they spend at Loblaw, Shoppers Drug Mart, Pharmaprix, and JoeFresh. They also receive points when they purchase fuel at Esso or Mobil stations.
- Customers receive points in-store, online, at points events, and through personalized offers from their online account.
- Free shipping and product pickups are also available, but these perks are reserved for Insider members, which requires a paid subscription.
- PC Optimum runs special reward campaigns on a weekly basis.

With the help of the PC Optimum app, members can keep offers in the palm of their hands and leverage program benefits on the go.

This description was created based on publicly available information without the contribution of the Loblaw Companies. Image Source: <https://www.pcoptimum.ca/>. Information taken during October–November, 2021. Details of the loyalty program might change over time.



Lessons to Learn

Coalition loyalty is a concept in which different brands join together in a partnership to provide a shared experience.

- 1. Customers can enjoy more freedom and a wider range of incentives.** They can earn points at all participating brands and choose where to redeem their points. Meanwhile, participating businesses benefit from an uplift in revenue, touchpoints, and increased user data.
- 2. Coalition programs offer a great opportunity for cross-promotion.** Brands can create joint loyalty campaigns, prompting members to discover new products and offers they would have missed otherwise. Having access to additional marketing channels and a larger audience to target opens up new promotional channels as well.
- 3. Participating in-store brands generally require a unified technology.** Brands in a coalition program may require a POS system to identify loyalty program members, as well as assign or deduct loyalty points. Therefore, the technology that supports a coalition program should be always taken into account when planning your loyalty program.
- 4. Establish what kind of industries are a good fit for coalition loyalty program.** They are an ideal choice for malls and retail hubs where multiple brands offer a diverse range of products at a single location or for companies that work with a large partner network. Among other benefits, coalition loyalty programs can provide tenants with additional value to strengthen the partner relationship.

Shop. Earn points. Repeat.



Earn points on the food and products that you buy most.



Earn 15 points on almost every dollar you spend at *Shoppers Drug Mart* and *Pharmaprix*.



Earn *PC Optimum* points when you purchase fuel at more than 2000 *Esso*SM and *Mobil*SM stations across Canada. [See details here.](#)



Earn points in-store, online, at points events and through personalized offers with your online account.



Earn points even faster with *PC Financial*[®]. Learn how at pfinancial.ca.



Every 10,000 points is like \$10 worth of free stuff. Redeem your *PC Optimum* points at special Spend Your Points events to get even more value.

PC Optimum members can earn points in store, online, and through personalized offers. They can also redeem their points at special Spend Your Points events to get even more value.

This description was created based on publicly available information without the contribution of the Loblaw Companies. Image Source: <https://www.pcoptimum.ca/>. Information taken during October–November, 2021. Details of the loyalty program might change over time.

Program Comparison



SEPHORA



	Starbucks	Sephora	Amazon	Nike	Optimum
Program type 	Point-based loyalty program	Tiered loyalty program	Subscription loyalty program	Perks loyalty program	Coalition loyalty program
Instant rewards 	Fun freebies; free coffee, pastry, protein box, or coffee tumbler; free refills.	Free standard shipping for purchases over \$50.	Free shipping and product pickups. Several delivery and shopping benefits.	Free delivery, 60-day wear test, receipt-free returns.	Product bonus points. Great savings.
Experiential rewards 	Receiving information about new products, discounts and special offers first-hand. Customizing orders and receiving an estimated pickup time.	First dibs on upcoming products, Meet-and-Greets, trips. Sweepstakes, exclusive events.	Unlimited streaming and access to movies and TV shows. Members can try on items before purchasing them.	Advice from real athletes, style advice, local events, members-only gear, & experiences, exclusive access to the newest styles.	Surprise annual gift box.
Personalized rewards 	Birthday treats, customized drinks.	Birthday rewards, exclusive gifts tailored for members.	A wide variety of benefits, so members can choose what works best for them.	Exclusive rewards when using Nike's workout app, access to personal Nike stores, product recommendations, birthday rewards, gifts for member anniversaries.	Tailors rewards to match what customers buy the most.
Omnichannel 	In-store, online and in Starbucks' mobile app.	In-store, online, and in the Sephora app.	Online and in the Amazon app.	In-store, online, and in the Nike App.	In-store, online, and in the PC Optimum app.

This comparison table was created based on publicly available information without the contribution of Starbucks, Sephora, Amazon, Nike or Loblaw companies. Information taken during October-November, 2021. Details of these loyalty programs might change over time.

The Most Influential Loyalty Program Trends for the Coming Years



Omnichannel Experiences, Personalization and Data Use Identified as Top Future Trends

The concept of loyalty programs is constantly evolving. What started out as a simple stamp collection scheme in shops and supermarkets has turned into a multi-faceted reward system with tiers, gamification, and experiential rewards.

Moreover, what constitutes a successful loyalty strategy heavily depends on the industry: organizations with high purchase frequency need to use a different loyalty logic and program structure compared to organizations that specialize in luxury products. As such, **the diversification of loyalty programs will continue.**

In order to get an accurate reading of how the loyalty market will look in the near future, all participants were asked to specify specific loyalty program **trends or program elements that they believed will significantly grow** or become more impactful over the next three years. This section is dedicated to analyzing the top three trends based on participant answers, using other relevant statistics pulled from the survey.

Trend #1

Redefining Omnichannel Experiences By Going Outside of the Buying Cycle

The ability to offer better, more seamless omnichannel loyalty experiences was the number one trend respondents believed will gain traction in the coming years. This demonstrates the growing awareness regarding the importance of omnichannel engagement.

Referring back to previous survey data, a **seamless omnichannel loyalty experience was identified as the most important challenge** for companies offering a loyalty program. And being able to support omnichannel capabilities is what respondents valued most among those opting for third-party loyalty technology.

PwC PERSPECTIVE



Maciej Kroenke
Partner at PwC

Communication channels

Loyalty programs are expected to play an even more significant role in marketing activities. A mobile-first approach and the improvement of mobile applications have opened up a new communication channel with customers.

Experience proves that mobile apps are significantly more effective than other channels typically used in the market. Moreover, as traditional linear media is becoming less relevant, loyalty programs supported by engaging apps appear to be the most effective channel for reaching younger generations, particularly in large cities.

However, even though the adoption of corresponding technologies, such as dedicated loyalty apps, and POS use cases will evolve and become more sophisticated, the true innovation regarding omnichannel experiences will most likely happen outside of the box. In other words, the **next step for omnichannel loyalty programs should happen by rethinking strategy**, rather than relying on technological advancements.

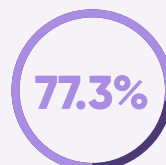
Current survey answers indicate one clear approach to increasing omnichannel touchpoints: going beyond the transactional relationship with customers.

The numbers show a potential uptick in rewarding non-transactional behavior among existing program owners, with **77.3% planning to do so in the next three years**.

When respondents were asked what kinds of interaction they sought to reward, two answers stood out most:

- **Easily approachable actions** like referring friends, publishing photos or commenting on social media – engagements that offer positive word of mouth
- **Engagement with company values**, such as recycling used clothes, donating to charity, or using a sport tracker to award bonus points for achieving fitness milestones – more sophisticated use cases that align members with company values and build positive brand perception

Intention to reward member behavior outside of the buying cycle in the next three years



77.3% of respondents who offer a loyalty program but so not yet reward member behavior outside the buying cycle plan to do so in the next three years.

Companies want to reward customers for engaging with company values and using products/services in everyday life.

Transactional rewards are no longer enough

Companies are realizing that transactional engagement leaves huge gaps between member interactions. And, if customers have no incentive to log into the loyalty program and engage with it between purchases, they are likely to forget about it, resulting in churn.

These down periods between purchases can be filled with **other interactions that aren't transactional in nature but create additional touchpoints** nonetheless, such as bringing in used clothes, or donating to charity.

Respondents were also asked whether they are currently rewarding any form of non-transactional behavior. If not, they were asked if they plan to introduce such scalability in the next three years? The answers align with previous findings, indicating a general lack of behavioral rewards in the current loyalty landscape, but **a strong desire to start incentivizing these valuable actions in the future.**

The most popular non-transactional engagements that are likely to be seen more of in the future are writing product reviews, participating on social media, and referring friends.

Behaviors Rewarded Outside of the Buying Cycle

Writing product reviews - Combined total: 46.5%



currently offering
plan to offer in the next three years

Engaging on social media - Combined total: 54.3%



Referring friends - Combined total: 74.2%



Attending events/virtual events - Combined total: 36.4%



Engaging with company values - Combined total: 34.5%



Using products/services in everyday life - Combined total: 34.5%



Engaging in community forum - Combined total: 43.1%



If these new touchpoints are offered across channels, businesses will be able to keep their audience invested in the brand between shopping sessions and prevent them from 'forgetting about the brand' or, more precisely, reducing customer churn and increasing lifetime value in the long run.



Actionable Insights

Now customers crave novelty and thrilling experiences more than ever. In order to deliver memorable moments, you need to have **as many meaningful touchpoints as possible**. Companies are rightfully invested in developing an omnichannel strategy, because it means their customers can be reached on all three major channels (online, mobile and offline), and the experience itself is consistent.

Here are a few ideas for creating a superior omnichannel experience with your loyalty program:

- **NFT rewards:** Ask members to participate in a social media contest to win exclusive NFT art
- **Influencer campaigns:** Organize social media takeover campaigns, where top members can meet their favorite influencer
- **Gamification:** Add fun gamification elements that are accessible through a smartphone app
- **VIP treatment:** Grant limited-time access to your VIP customer service line to customers who recycle products
- **Safe behavior:** Reward customers for adopting safe behavior or opting for healthy habits.
- **Learning:** Providing online learning materials and tutorials to help customers better use your products and services

Drink BrewDog, Kill Carbon

Planet BrewDog Case Study

Launched in May 2021, Planet BrewDog is the loyalty program of craft beer brewer BrewDog. The company wanted a simple, yet intuitive loyalty program that aligned with the brand's mission of offsetting the CO2 output.

As a result, Planet **BrewDog doesn't use points**. Instead, members can earn badges for various actions. Those **badges unlock instant rewards**. For instance, buying a minimum number of BrewDog beer cans earns members the "Drink BrewDog, Kill Carbon" badge.



Alice de Wend Fenton
Head of CRM & Loyalty, BrewDog

"The main thing that makes our program unique is the tie-in with one of our key brand pillars: sustainability. Members earn rewards when they offset CO2 and we also have a counter to show how many grams of carbon our community has offset. We're proud of the fact Planet BrewDog is not completely transactional and we're working towards something that's good for the planet."

As for future plans, we want to grow the community aspect. Whether it's up-weighting the gamification element, or having more interactive content, we want to evolve Planet BrewDog into something that's a little bit more fun and playful."

BREWDOG

WELCOME TO PLANET BREWDOG 2/4

Badge Name	Requirement	Status	Reward
NICE TO MEET YOU	Register for a BrewDog.com account	Complete!	You have joined Planet BrewDog
FRIDGE FILLER	Place an order on BrewDog.com	Incomplete	FREE 4 pack of any HEADLINER with your next order (see t&c's for headliners)
BEER GEEK	Complete the "My Planet BrewDog" info section	Complete!	Unlock Exclusive BrewDog Headliner tasting guide
DRINK BREWDOG KILL CARBON	Offset 35 kg CO2 through your orders on BrewDog.com	Incomplete	Sustainability Status Badge

Trend #2

Breaking Away From One-Size Fits All Benefits With Personalized Rewards and Experiences

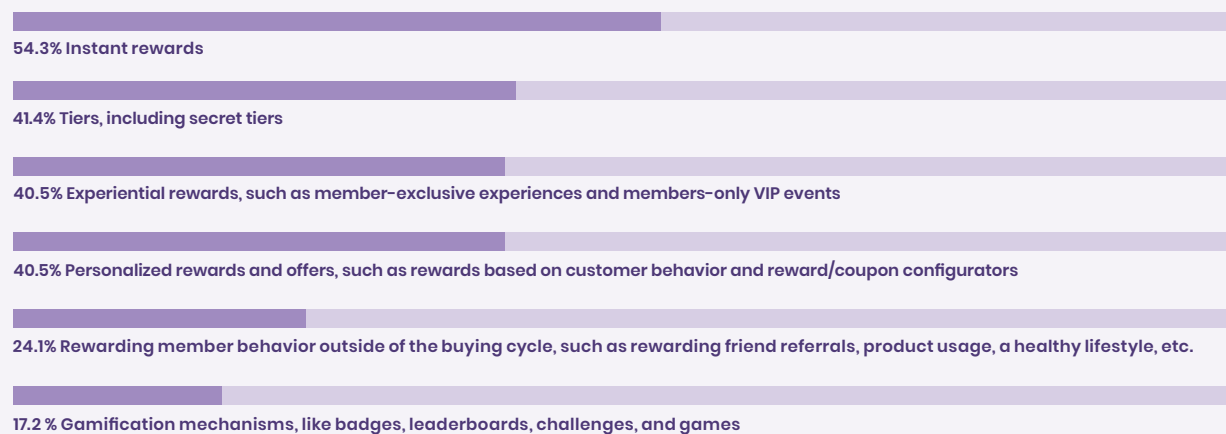
Customer interactions are just half of the experience. But without memorable and relevant rewards, it's impossible to maintain customer interest. Sentiment among survey respondents mirrors this statement, as companies offering a loyalty program selected personalization as the most important investment in loyalty in the coming years.

In fact, 29.3% of respondents reported that personalization was their most important investment in the coming years.

Survey numbers strongly back up the assumption that personalization and personalized rewards will become a defining factor for loyalty programs.

- When asked, **40.5% of program owners reported that they utilize some form of personalized rewards or offers.**
- Interestingly, the same **number of respondents stated that they offer experiential rewards**, such as exclusive experiences and members-only VIP events.
- **Instant rewards are also popular**, because they satisfy members' need for instant gratification. However, in the long run, they're less memorable.

Current structure of loyalty programs



Loyalty mechanisms currently offered by program owners.

PwC PERSPECTIVE



Maciej Kroenke
Partner at PwC

Partnerships are back on track

Another observed trend which will gain importance in the coming months is related to partnership rewards. Typical partnership rewards are additional offers from third-party merchants, as well as special offers that need to be redeemed at partner networks (non-food for groceries, services for home décor, etc.)

Additionally, **we have observed an increase in the importance of partnership-based, permanent or campaign-driven social responsibility** rewards such as the donation of points to charities or local institutions in need.

Personalization is already strongly represented in the current loyalty program landscape, but the trend will be even more prevalent in the future, as many current program owners plan to introduce personalization in the future.

Almost half of respondents, **48.3%, confirmed that they plan to offer personalized rewards and offers in the next three years.**

Personalized rewards are on the rise.

88.8% of program owners reported that they either currently offer or plan to offer personalized rewards in the next three years.

The importance of personalized rewards

40.5% of program owners currently offer personalized rewards and offers, such as rewards based on customer behavior and reward/coupon configurators

48.3% of program owners plan to offer personalized rewards and offers, such as rewards based on customer behavior and reward/coupon configurators in the next three years

EXPERT PERSPECTIVE



Adam Posner

Customer loyalty specialist, CEO,
The Point of Loyalty

„In 2022, loyalty programs will step up the performance of their personalisation. The reason is loyalty programs are an overt value exchange of expectations and promises. The exchange of their personal data sets up members' expectation of personalisation. They say: You have my data, now use it to be relevant to me, my behaviours, my life and the rewards I want. Show me you know me.

Personalisation will evolve from a 'static' choice of rewards where there is a catalogue of options to choose a reward to a 'dynamic' real-time serving up of rewards based on machine learning and deeper analysis of members' likes, dislikes, profile and previous redemption behaviours... knowing and recommending what they might want before they've even asked for it!"

Trend #3

Utilizing Loyalty Programs to Collect Zero- & First-Party Data

Loyalty programs are a corporate project. As such, they need to fit into the company's overall marketing, finance, and data strategy. Data strategy has become especially prevalent with the emergence of **new privacy protection laws**, as well as more and more **browsers putting a stop to the use of third-party cookies**. For that reason, it's clear why survey respondents voted data collection the third most important trend for the future of loyalty programs.

The importance of data-driven marketing cannot be understated. It impacts all stages of the customer lifecycle, from acquisition to retention. **Without accurate data, it's impossible to identify the most valuable customers** or to track the success of marketing campaigns.

In the absence of third- and second-party data, the value of zero- and first-party data has gone up. Companies are now looking for new ways to learn more about their customers. Loyalty programs are seen as one such solution.

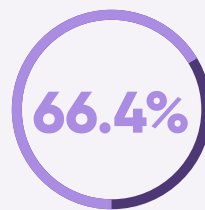
Loyalty programs can help you learn more about customers:

- **First**, loyalty programs serve as a gateway to gathering data: in order to become a member, customers have to consent to providing valuable information, such as socio-demographic and preferences.
- **Secondly**, member activity is another information source that can be used for segmentation and personalization. Having a list of gold-tier loyalty program members is a great indication of who your most valuable and loyal customers are.
- **Lastly**, loyalty programs can reward customers for sharing customer data with incentivized surveys or user profile completion. These are valuable sources of information about loyalty program members.

Loyalty data, in particular, plays an important role in making higher quality data-driven decisions. Knowing what customers want and what their needs are gives organizations the opportunity to personalize messaging and rewards. This data can also positively influence product and service development, the loyalty reward offering, market development, and more.

Loyalty program owners generally agree on the heightened role of loyalty programs, with **66.4% stating that when it comes to their company's overall strategic decisions, customer loyalty and loyalty marketing have an important impact.**

Loyalty's impact on strategic decisions



66.4% of respondents whose company has a loyalty program reported that customer loyalty and loyalty marketing have an important impact on their company's overall strategic decisions.



Actionable Insights

There are multiple ways to gather transactional and behavioral customer data.

Consider **asking direct questions about customers' product preferences, favorite brands, purchase frequency, level of satisfaction** — data you would otherwise have to predict indirectly using algorithms.

- Taking surveys
- Completing customer profiles
- Taking quizzes
- Answering customer satisfaction polls
- Sending direct feedback

Whichever option you choose, make sure to capture the most valuable information.

Also, remember to be creative. It's important to realize, however, that **capturing loyalty data is just the first step**. You should consider how said data, both transactional and behavioral, can be leveraged. Here are a couple of examples:

- Building personalized rewards and customer experience
- Using it to develop your products and services
- Creating more personalized campaigns and communications

The Power of Personalization

LVR Privilege Case Study

Italian luxury fashion retailer LUISAVIAROMA launched its loyalty program, LVR Privilege, with exclusivity and personalization in mind. **The web experience is unique for each customer:** the available coupons for redemption change based on how many points members have.

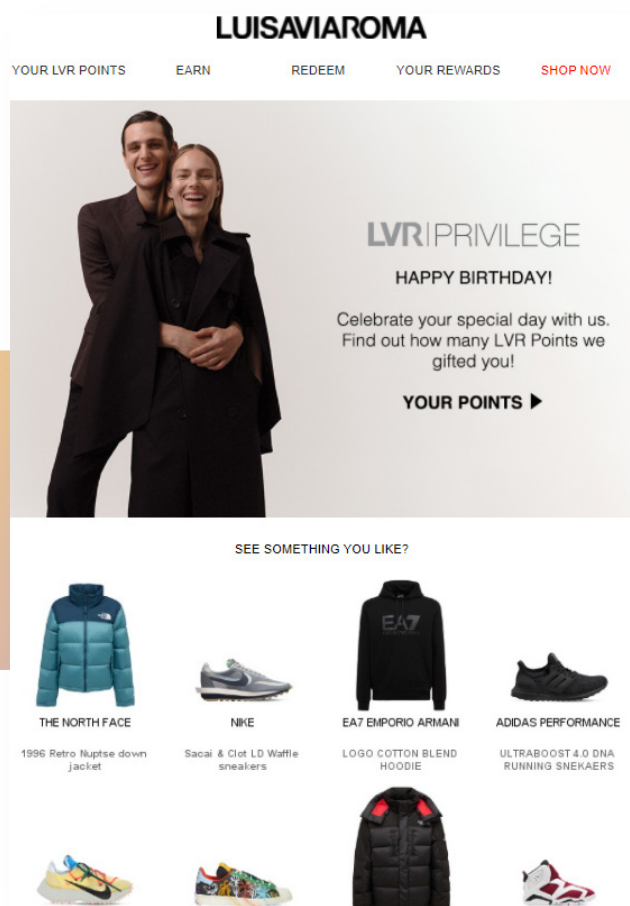
Email communication also depends on customer information: the higher a person's tier, the more benefits they get in a birthday or brand anniversary email. The program uses data to personalize the customer experience both online and offline, as well as make communication more personalized and targeted.



Francesca Montanari
Senior CRM Specialist,
LuisaViaRoma

***“Targeting is the key. We have a very big database, so we can use the data that we collect to target customers and to personalize their communications, experience and the rewards they see. Thanks to this personalization, we can offer a tailored experience for everyone, or at least for different groups of people.*”**

As part of our program, we do email automations. They're based on the fact that we target customers who are likely to churn, for example. We do this with an algorithm. We reach customers at risk of churning via email, and we try to re-engage them and offer them a benefit to get them back. Data and targeting are really important for the success of the campaign.”



The Grand Summary



Global Customer
Loyalty Report
2022

Key Takeaways

Many Companies Are Looking to Revamp Their Loyalty Program

We're at the threshold of a paradigm shift in loyalty programs. Current loyalty programs are characterized as having a more transactional than emotional sentiment. Also, for program owners, the two biggest priorities are higher engagement and revenue rates. And, despite the fact that 93.1% of companies that track ROI report a positive return on investment, 71.6% of respondents are looking to revamp their program.

Future Loyalty Programs Will Be More Emotional

Companies planning to launch or redesign their program have reported drastically different approaches to their loyalty concept. Even though the main priority of these rewards programs is still customer engagement, they aim to achieve this through better customer experience and personalized rewards. In fact, **53.6%** of respondents whose company is planning to launch a loyalty program in the next two years foresee their upcoming program as more emotional than rational. In other words, loyalty will be built on an emotional engagement.

Experiential & Personalized Rewards Will Grow in Popularity

Responses already indicate a decent adoption of experiential and personalized rewards as **40.5%** of respondents whose company owns a loyalty program claimed that they already offer such capabilities. Moreover, **55.4%** of respondents whose company plans to offer a loyalty program in the next two years reported that their loyalty program will offer experiential rewards such as member-exclusive experiences and members-only VIP events.

Loyalty Programs Are Effective During the Crisis

Loyalty programs performed extremely well during the Covid-19 pandemic. Results show that for **62.1%** of the respondents, loyalty programs have helped to keep their customers engaged during the Covid-19 crisis. Tiers were particularly effective during the crisis: based on the data from 25 million user actions, members in a higher tier level had a **29.6%** higher visit frequency than members in lower tiers. It's also worth mentioning that loyalty programs can effectively build a loyal community to fall back on when a crisis hits.

Key Takeaways

Upcoming Loyalty Programs Lean Toward Third-Party Technology Providers

In terms of technology, satisfaction among existing program owners is higher amongst those using third-party vendors, contrary to loyalty technology that's built in-house. A similar trend is seen among those planning to launch their program in the next two years, indicating a slight shift towards loyalty technology vendors: **44.6%** plan on using third-party technology from a dedicated vendor, **21.4%** plan to run their program in house, while **33.9%** are undecided.

Companies Are Looking at Top Innovators for Inspiration

The current loyalty market trendsetters include Starbucks, Sephora, Amazon, Nike, and the coalition of Loblaw companies. These organizations received the most votes from respondents when asked which programs inspired them most in their work. All five of these companies offer a loyalty solution with recognizable capabilities, such as customer-friendly apps, extensive experiential and personalized rewards, a subscription model, incentives to adopt a healthy lifestyle, and community building.

Loyalty Programs Will Play a Vital Role in Data Collection and Usage

Last but not least, loyalty programs are forecasted to play an important role in gathering zero- and first-party data as second- and third-party data collection disappears. According to the survey responses, **66.4%** of companies with a loyalty program reported that customer loyalty and loyalty marketing have an important impact on their company's overall strategic decisions, as the program can be used to entice customers to participate in surveys or complete their user profile, allowing businesses to gather a wider range of data for use in segmentation and personalization.



How to Take Action

Behind the scenes, there are a lot of similarities in the way that loyalty programs are built, revamped and redesigned. In three years, what's considered to be "the default" by loyalty program members will change forever.

Companies that are planning to enter the loyalty market in the foreseeable future or wish to revamp their program need to act fast, and with caution by considering which trends are gaining momentum.

Here are our recommendations:

Start Looking Into Emotional Loyalty

If you already have a loyalty program that offers transactional rewards, consider implementing emotional components and start rewarding member behavior outside the buying cycle.

You don't have to abandon existing transactional elements. Instead, add a few experiential and personalized rewards into the mix, preferably as high-tier benefits. New loyalty program owners should start their MVP with some experiential and personalized rewards, and add new ones by tracking which type of benefits (e.g. members-only benefits, early access, VIP customers support, etc.) the community prefers the most.

Assess Your Tech Needs Carefully

It doesn't matter whether you're planning to launch or relaunch your loyalty program, a

thorough background check will allow you to see whether your system is ready for innovation. For instance, your CRM system or CDP needs to be up-to-date in order to handle data collection efficiently.

On a similar note, investigate whether your company has the resources, time, expertise and development manpower necessary to develop a loyalty program in house, because it's a huge undertaking. For quicker implementation and comprehensive technology, consider partnering with a third-party loyalty vendor.

Learn How to Collect and Leverage Zero- and First-Party Data

Zero- and first-party data are essential to having a deep understanding of customers' needs and preferences, because personalization will continue to gain importance. However, this kind of data layer requires a different approach than second- or third-party data. To rise to this challenge, you need to gear your loyalty program towards not just collecting data, but also building your strategy around it. The personalization of the membership experience, in particular, will be an important investment in the coming years for current program owners.

Ensure a Great Omnichannel Experience

Loyalty programs can contribute to your organization's omnichannel experience by introducing new touchpoints. In order to capitalize on this, make sure to go beyond transactions and reward a wide range of customer interactions, such as writing reviews, donating to charity, tracking workout progress, or recycling.

Respondent Profile

35.7%

of respondents work for a company that offers a loyalty program

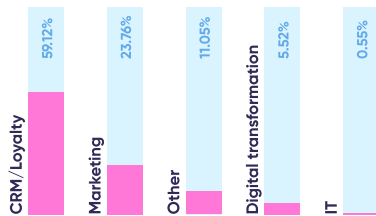
17.2%

of respondents work for a company that plan to launch a loyalty program in the next two years

47.1%

of respondents work as an independent consultant or work for an agency or a technology vendor

Respondents' professional responsibilities:

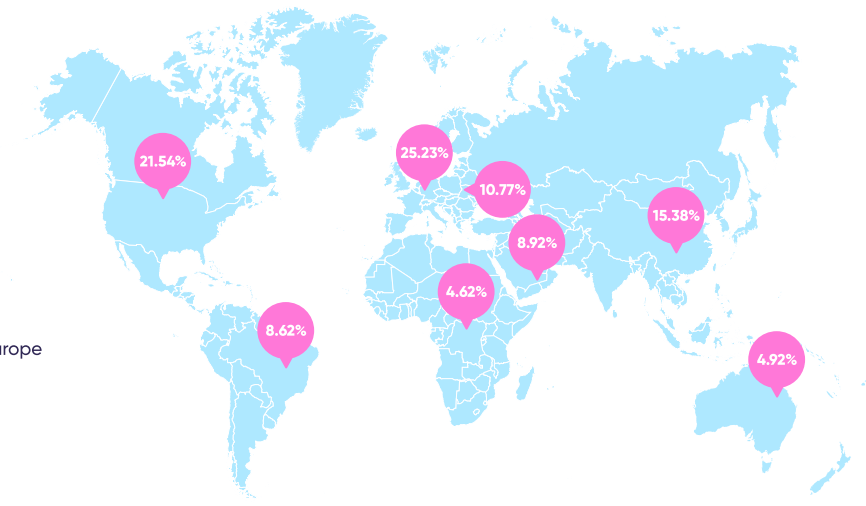


Respondents' current level of seniority:

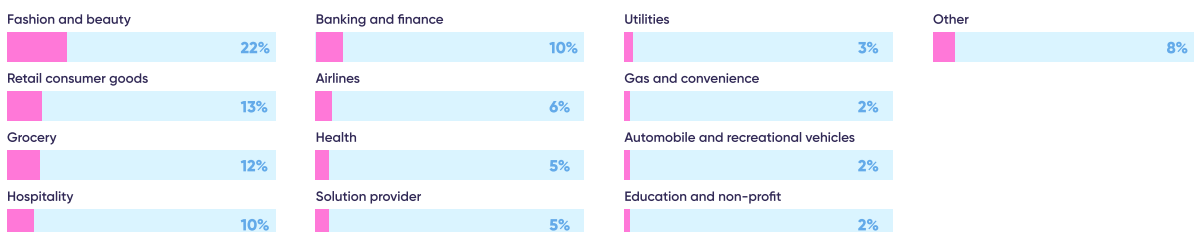
- 35.7% Manager
- 20.99% Director
- 15.47% C-Level/President/Owner
- 15.47% Specialist/Professional
- 9.39% Senior Vice President/Vice President
- 4.97% Consultant

8 different regions:

- 21.54% North America
- 8.92% Middle East
- 15.38% Asia
- 25.23% Western Europe
- 10.77% Central and Eastern Europe
- 8.62% South America
- 4.92% Oceania
- 4.62% Africa



Sector of activity:



Methodology

Data collection methods for the Customer Loyalty Report 2022 included:

- A self-administered questionnaire survey
- Individual interviews
- Secondary data analysis
- Anonymous member interactions from Antavo's loyalty database
- Additional insight provided by a PwC expert

The self-administered survey was completed between September 9 and October 9, 2021. The survey featured mostly quantitative results, but qualitative results appeared as well. Open text responses were included. Sample size:

- Total sample: 325 respondents
- Respondents with a loyalty program: 116
- Respondents without a loyalty program with plans to launch one in the next two years: 56
- Independent consultants, employees at agency/consulting firms and technology vendors = 153

Individual interviews with loyalty experts and brands were carried out between October and November, 2021.

The descriptive and comparative analysis were carried out on the basis of the primary data collected using the survey. The results were stated at a 95% confidence level.

Member interaction data was tracked across 13 loyalty programs. This data was collected between 2018 and 2021. The data represents more than 25 million events collected from 2.2 million customers.

Third-party sources:

<https://www.marketsandmarkets.com/Market-Reports/loyalty-management-market-172873907.html>

<https://www.starbucks.com/rewards>

<https://www.sephora.com/beauty/loyalty-program>

<https://www.amazon.com/amazonprime>

<https://www.nike.com/membership>

<https://www.pcoptimum.ca/>

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The **Global Customer Loyalty Report 2022** and accompanying survey was a collaborative effort between **Antavo** and several industry experts.

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About Antavo

Antavo is an API-centric and no-code loyalty technology provider that builds comprehensive, enterprise-grade loyalty programs.

Antavo was listed as a Representative Vendor in Gartner's 2020 Market Guide for Loyalty Management and was included in Forrester's Now Tech: Loyalty Marketing Q4 2020 and Now Tech: Promotions And Offer Management Providers, Q3 2021 reports.

As a global company, Antavo empowers clients like Lagardere, the Benetton Group, BMW and Kathmandu.

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