



Bond Brand Loyalty's 2025 Loyalty Report is out. Unlike some IP which is published purely as sales aids, the Bond survey is generally deep, broad, and authoritative. While I've only reviewed the Executive Summary version, I find a couple of interesting items.

To get my inevitable critique out of the way, I have to say that the "tectonic shift" Bond identifies, based on a change in "the foundations of loyalty" is a bit underwhelming, since the specifics they cite are the same innovations we've all been talking about, and implementing, for years now. Access to exclusive content, product, and experiences, along with more meaningful, data-driven personal relevance, are what power emotional loyalty today – and that's been true for years. While our tools keep getting better, we identified those factors as the future of loyalty way back in the first years of this century.

But there is something very significant lurking within Bond's findings. And it represents great opportunity for the truly innovative.

The research cites strong evidence that loyalty programs continue to be very important to successful consumer / brand relationships. Seventy-nine percent of American consumers surveyed say programs make them more likely to recommend; seventy-four percent report spending more to maximize program benefits; and eighty-five percent say programs make them more likely to stay with a brand. All three categories are essentially unchanged from recent years.

And yet, only thirty-three percent of respondents strongly agree that programs deliver "good value for money spent."

That dichotomy suggests significant opportunity for innovations that can make benefits more useful across more parts of consumers' lives.

For example, the programs of the two large multi-brand supermarket chains in the US, Kroger and Albertsons, deliver savings on both groceries and gasoline, through their partnerships with oil companies. The structures and business rules ensure that, while generous to consumers, the programs are financially sound AND relevant beyond the walls or website of the store.

Could loyalty earnings be more immediately valuable in real time? Could program currencies be more fungible, like cash? The creative thinkers that develop these kinds of innovations could be the source of the next REAL tectonic shift in loyalty, and maybe bridge the current chasm between conventional program effectiveness and perceived value. *Your thoughts?*

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