

Over the past year, we have used this maturity model to conduct an in-depth evaluation of more than 115 consumer loyalty programs

OVERVIEW

- We've set out to better understand the loyalty landscape, including which **loyalty features are table stakes to compete** and which are **paving the way** in today's loyalty environment
- We defined 'loyalty programs' as **any reward or membership mechanism** that provided a consumer with a financial or non-financial benefit for engagement
- Our evaluation **spanned 14 industries** across a breath of company sizes, program maturities, and loyalty approaches (e.g., free vs. paid)

INDUSTRIES EVALUATED

1. Airlines

2. Apparel & Footwear

3. Convenience & Gas Stations

4. Department Stores

5. Grocery Stores

6. Health, Beauty & Wellness

7. Healthcare

8. Home Goods (e.g., auto parts, electronics, furniture & home décor)
9. Hospitality

10. Mass Retailers

11. Pharmacy & Drug Stores

12. Quick Serve Restaurants

13. Sports, Leisure & Hobbies (e.g., pet supplies, sporting goods)

14. Transportation Services (e.g., ride share providers, car rental services)

Using our maturity model, each consumer-observable feature was evaluated and scored against a maturity scale of 0-3 to quantify the current-state experience

- 0

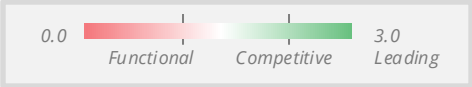
Feature or element is **non-existent** in the brand's loyalty program
- 1

Feature or element exists and meets **basic, functional** needs
- 2

Feature or element is **competitive** and delivers a **strong experience**
- 3

Feature or element **exceeds expectations** and provides a **best-in-class** experience

Deloitte Loyalty Maturity Model



Our findings reveal where leaders are investing and can help brands identify opportunity areas

	Your Brand		Industry Peers			Industry-Adjacent		
	Company 1	Company 2	Company 3	Company 4	Company 5	Company 6	Company 7	Company 8
Program Value	X	X	X	X	X	X	X	X
Earn & Redeem	X	X	X	X	X	X	X	X
Benefits	X	X	X	X	X	X	X	X
Customer Experience	X	X	X	X	X	X	X	X
Personalization	X	X	X	X	X	X	X	X
Ecosystem	X	X	X	X	X	X	X	X
Community & Social	X	X	X	X	X	X	X	X
Brand & Mission	X	X	X	X	X	X	X	X