

Loyalty Trend Report 2024

—
Realizing Loyalty's Full Potential

paytronix

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The 2024 Paytronix Loyalty Trend Report reveals how restaurant and convenience store (c-store) operators optimize engagement among their best guests and biggest fans.

You'll discover how new technologies are empowering brands to:

- Leverage real-time customer data for intelligent segmentation
- Deploy personalized communications and automated campaigns
- Implement proven engagement drivers like gamification, subscriptions, and multi-tier models

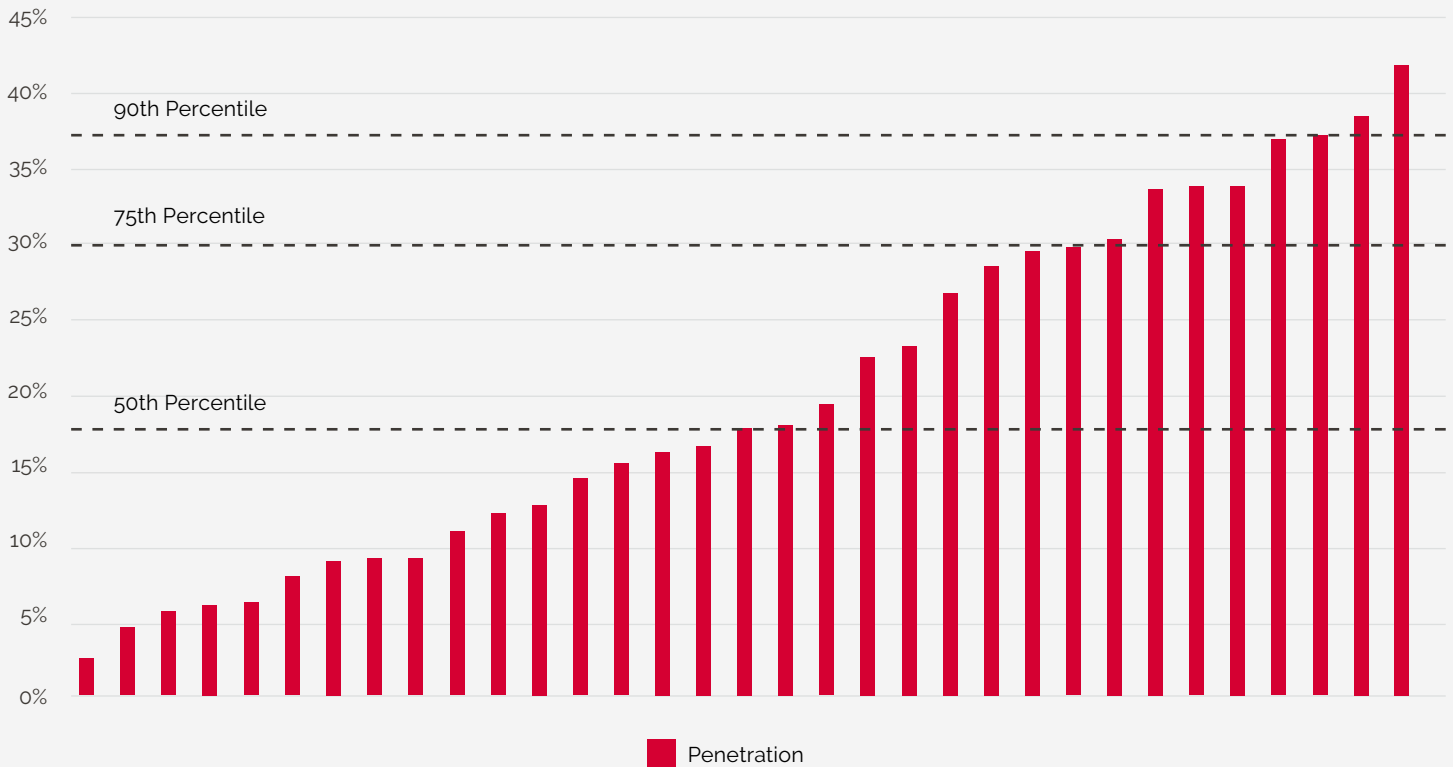
This report will also help you compare your own results against benchmarks for key loyalty metrics, including average spend per visit, visit frequency, and average customer lifetime value (CLV). Whether you lead marketing, operations, or technology for a national brand or a regional player trying to capture more market share, you'll find everything you need to make loyalty your best asset in 2024 and beyond.

The New Loyalty Imperative: Driving Strategic Growth Through Innovation

While restaurant and c-store loyalty programs have always been an effective way to engage guests, lately they've become strategic drivers of growth. With discount-focused promotional strategies becoming increasingly unsustainable in today's inflationary economy, forward-thinking operators are pioneering innovative approaches to cultivating loyalty that transcends transactional rewards.

For Paytronix clients, loyalty innovation is paying major dividends. Operators in the 75th percentile of loyalty transaction share (transactions from loyalty program members compared to all transactions) achieve 30% of their transactions from loyalty program members, while brands in the 90th percentile see loyalty penetration reaching 37% and beyond.

LOYALTY SHARE OF TOTAL TRANSACTIONS



Operators in the 50th percentile of loyalty transaction share see an average 18% loyalty penetration rate, while those in the 75th percentile achieve 30% penetration. Top performers in the 90th percentile boast an impressive 37% average share of transactions coming from loyalty program members.

Source: Paytronix internal analysis

Engaging Guests and Eliminating Churn

Sustained loyalty success requires retaining engaged members while continuously acquiring new ones. The highest-performing quick-service restaurants (QSRs) achieve an average 62% monthly loyalty program member retention rate, while elite full-service restaurants (FSRs) retain 58% of their loyalty program members month-to-month, on average. C-stores lead in this area, with top performers (90th percentile) reaching an 85% average retention rate.

LOYALTY PROGRAM MEMBERS—MONTHLY RETENTION RATE

	50th Percentile	75th Percentile	90th Percentile
QSRs	44%	52%	62%
FSRs	45%	51%	58%
C-Stores	80%	83%	85%

Source: Paytronix internal analysis

When it comes to loyalty member acquisition, the best QSRs sign up an average of 110 new loyalty members per store each month. Their FSR counterparts acquire 70 new members per location monthly, and leading c-stores add an average of 36 new members per location each month.

LOYALTY PROGRAM MEMBERS—MONTHLY ACQUISITIONS PER STORE

	50th Percentile	75th Percentile	90th Percentile
QSRs	35	52	110
FSRs	25	45	70
C-Stores	12	25	36

Source: Paytronix internal analysis

Loyalty by the Numbers: How Does Your Program Measure Up?

Performance indicators across restaurants and c-stores by concept—quick-service restaurants (QSRs), full-service restaurants (FSRs), and c-stores. Key metrics are broken out by percentile ranks from median (50th) to elite (90th), so you can benchmark your own program performance.

QSRs	50th Percentile	75th Percentile	90th Percentile
Average Spend Per Visit	\$19.05	\$22.62	\$30.16
Average CLV	\$618	\$817	\$1,009
Month-to-Month Retention	44%	52%	62%
Average Visits Last 30 Days	1.7	2.0	2.5
Average Visits Last 90 Days	2.7	3.4	4.5
Average Monthly Acquisitions Per Store	35	52	110
Percent of Segmented Campaigns	78%		
Percent of Campaigns Using Push Notifications	25%		

Source: Paytronix internal analysis

FSRs	50th Percentile	75th Percentile	90th Percentile
Average Spend Per Visit	\$39.35	\$44.58	\$77.49
Average CLV	\$1,046	\$1,580	\$2,448
Month-to-Month Retention	44.5%	50.7%	57.8%
Average Visits Last 30 Days	1.7	2.0	2.5
Average Visits Last 90 Days	2.5	3.2	4.3
Average Monthly Acquisitions Per Store	25	45	70
Percent of Segmented Campaigns	70%		
Percent of Campaigns Using Push Notifications	11%		

Source: Paytronix internal analysis

C-Stores	50th Percentile	75th Percentile	90th Percentile
Average Spend Per Visit	\$13.03	\$19.98	\$24.30
Average Fuel Spend Per Visit	\$39.88	\$44.68	\$52.39
Average CLV	\$5,046	\$7,298	\$11,157
Month-to-Month Retention	80%	83%	85%
Average Visits Last 30 Days	6.5	7.0	8.2
Average Visits Last 90 Days	14.6	16.7	19.3
Average Monthly Acquisitions Per Store	12	25	36
Percent of Segmented Campaigns	82%		
Percent of Campaigns Using Push Notifications	27%		

Source: Paytronix internal analysis

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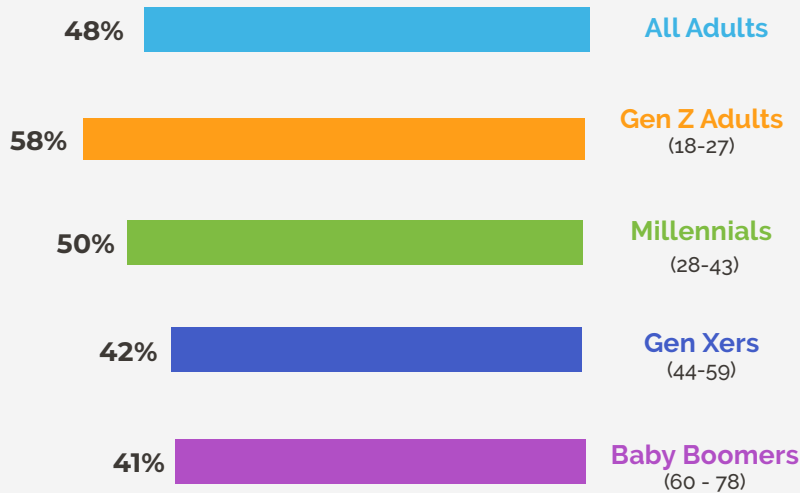
Loyalty Gets Personal with Experiences

People look for brands that recognize and serve their individual needs as they decide where to spend their money. Smart restaurant and convenience store operators understand this and work to create personalized experiences for guests through their loyalty programs.

According to the National Restaurant Association's (NRA) *2024 State of the Restaurant Industry* report, guests typically join an average of 3.6 restaurant loyalty programs. Gen Z adults lead the pack, joining 4.4 loyalty programs on average:

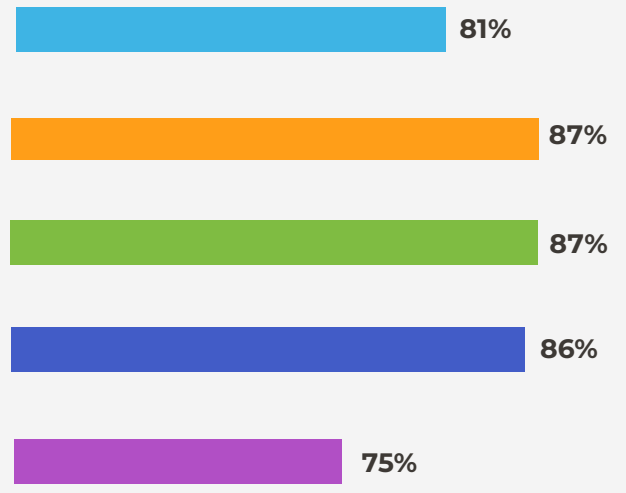
SIGN THEM UP RIGHT AWAY

% of loyalty program members who say they're less likely to try a new place because they prefer to go where they're a member of a loyalty program



WAITING TO BE WOODED

% of customers who say they'd likely participate in a loyalty program if it was offered



According to NRA data, guests prefer going to places that give them special, personalized treatment.

Source: National Restaurant Association, *2024 State of the Restaurant Industry*

The NRA report reveals that 78% percent of current loyalty program members are more likely to visit a restaurant where they can earn points, even if it's less convenient. And 81% say they'd join another loyalty program if it was offered by their favorite establishment. Loyalty programs offer operators the best opportunity to engage with guests, and more operators are taking a hyper-personalized approach to stand out.

In February 2024, Starbucks achieved a record 34.3 million active U.S. members and revealed plans to focus on greater personalization to increase patronage. "We talk a lot about our personalization capabilities at Starbucks, but truly that job is never done because as new technologies and capabilities come online, we are grabbing those and integrating them into our system," said Brady Brewer, Starbucks SVP and CMO.



Market Insight: Personalization Pays Off

According to McKinsey & Co., companies that excel at personalization generate 40% more revenue from their personalization efforts than average players.



40%

more revenue from personalization

A New Level of Personalization is Needed

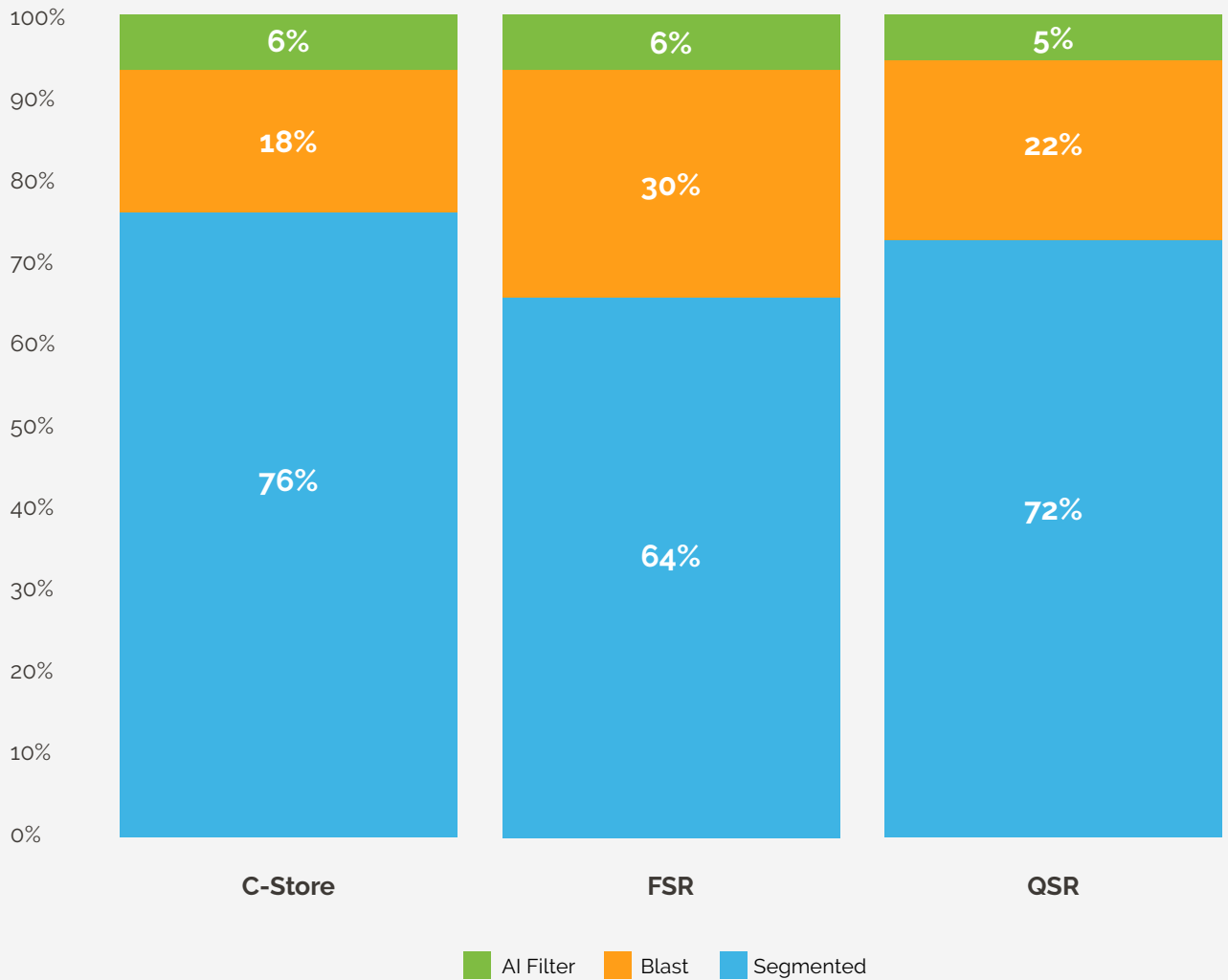
PwC's *Customer Loyalty Executive Survey 2023* reported the top reason customers stay loyal is "the experience feels personal and created just for them." It's the level of personalization consumers expect these days, and anything less misses the mark.

According to PYMNTS Intelligence, only 44% of consumers say the offers they get are relevant, indicating a desire for higher levels of personalization. The report confirms 83% of consumers are receptive to personalized messages and nearly half are likely to switch brands for more relevant offers. In fact, "appropriately tailoring offers to a consumer's specific needs and interests doubles the chances the consumer will switch merchants."



Market Insight: Most Brands Use Some Level of Campaign Segmentation

Over 70% of brands' campaigns are segmented vs. sent to their entire loyalty database. Less than 10% of campaigns leveraged predictive model scores.



Source: Paytronix internal analysis of campaigns from Oct. 1-Dec. 31, 2023

Advanced personalization tools that create differentiation, emotional connection, and brand affinity should be front and center for loyalty programs in 2024. Here's what that looks like:

- 1 Differentiation**

Rewards must fit the brand and match what each individual member craves. This could mean offering monthly subscriptions or meal passes, providing early access to new menu items, or celebrating milestones like birthdays with experiential rewards like a hands-on cooking class.
- 2 Emotional Connection**

By analyzing purchase histories and contextual cues, such as location data, weather data, device data, and key dates like guest birthdays or loyalty program anniversaries, operators can develop personalized offers that drive positive feelings. Examples include wishing members a happy anniversary with a buy-one-get-one (BOGO) deal, welcoming members back from vacation with a coupon for their favorite pick-me-up beverage, or thanking members who reach annual spend tiers by donating in their name to a local cause.
- 3 Brand Affinity**

When guests feel recognized and appreciated, their brand affinity increases. Personalization engines that enable individualized loyalty experiences are key to creating and sustaining win-win experiences.



Doing it Right: Getting personal through data and AI

Smashburger

[Smashburger](#)®, a Colorado-based burger chain and franchisor, used Paytronix artificial intelligence (AI) and machine-learning (ML) tools to create personalized, one-to-one marketing campaigns based on preferences and behavior, like a veggie burger offer for guests who don't consume beef. The new paradigm resulted in a 20% lift in spend, a 16% lift in visits, and an incredible 61x ROI.

Personalization Requires Planning

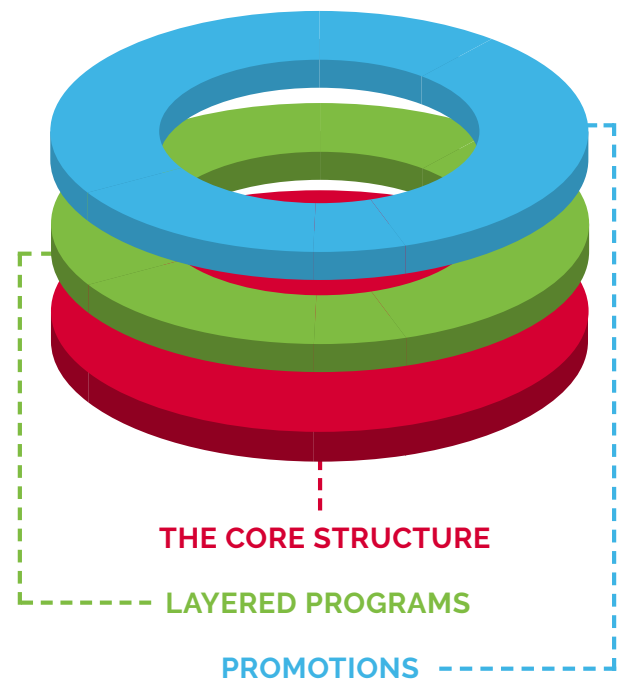
Creating or retooling a program that supports a high level of personalization requires diligent upfront alignment with your brand identity and audience segments. Think about how you can tailor your loyalty program's core structure, earn/spend mechanisms, and reward offerings so they resonate with what each guest segment truly desires. Leverage your brand's unique selling points (USPs) to differentiate the program's value proposition in the market.

For example, a fast casual brand could implement a points-based system where members earn and redeem rewards for free food, merchandise, and exclusive experiences. A coffee chain may find success with a subscription model for unlimited beverages combined with surprise-and-delight rewards. C-stores can drive loyalty program signups through fuel rewards tied to in-store purchases.

A great way to get the wheels turning is to assess other brands' loyalty programs, listing the pros and cons of each one. This exercise will help shape your approach while addressing critical considerations such as:

- Defining the most effective ways to engage guest segments
- Creating a flexible structure that allows for brand-aligned promotions
- Making program management easy for your staff through training, alignment before revamping programs, and keeping software and hardware updated
- Identifying and using program structures that deliver the highest return on investment
- Implementing robust data-capture mechanisms for accurate and effective guest segmentation

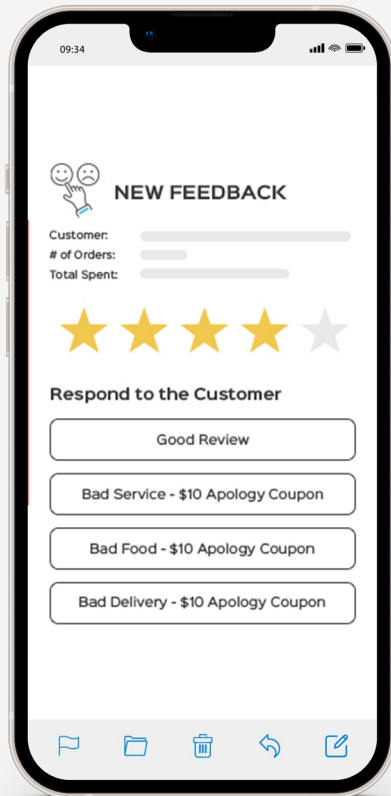
EVERY LOYALTY PROGRAM CONSISTS OF THREE COMPONENTS:



Once you've established a program that's aligned with your goals, you can layer on personalized features and promotions, like subscriptions or visit challenges, that add depth, drive sustained engagement, and foster CLV.



Market Insight: AI Touches Hearts with Automated Feedback



Conversational AI can boost loyalty by rapidly responding to reviews and questions. Even automated responses show your best guests you really care and give lapsed or at-risk guests the attention needed for them to reengage.

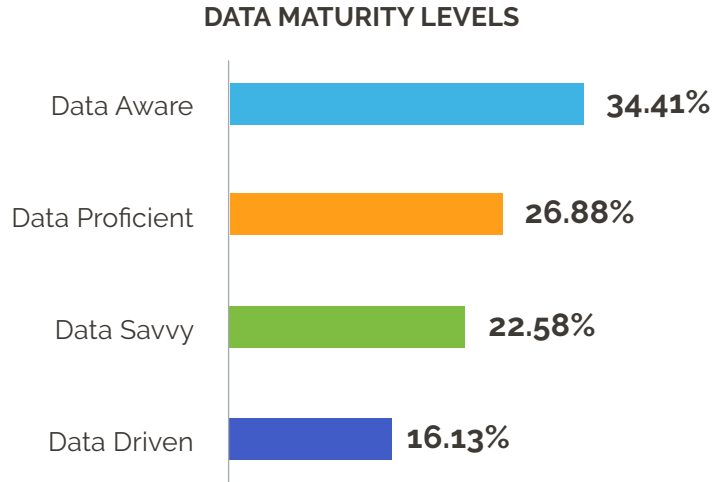
Manually crafting personalized replies becomes unsustainable as customer interaction volumes increase, but large language models (LLMs) and natural language processing (NLP) can automatically generate personalized real-time responses to comments at scale.

Whether it's issuing a sincere apology for a negative experience along with a make-good offer or doubling down on praise with a surprise that delights, AI empowers you to nurture more guest relationships.

Data and Analytics Drive Performance

Harnessing the power of data is critical for creating and supporting a personalized loyalty program. Starbucks, a recognized leader in data-driven loyalty marketing, attributed 57% of all US sales in 2023 to Starbucks Rewards members, according to eMarketer.

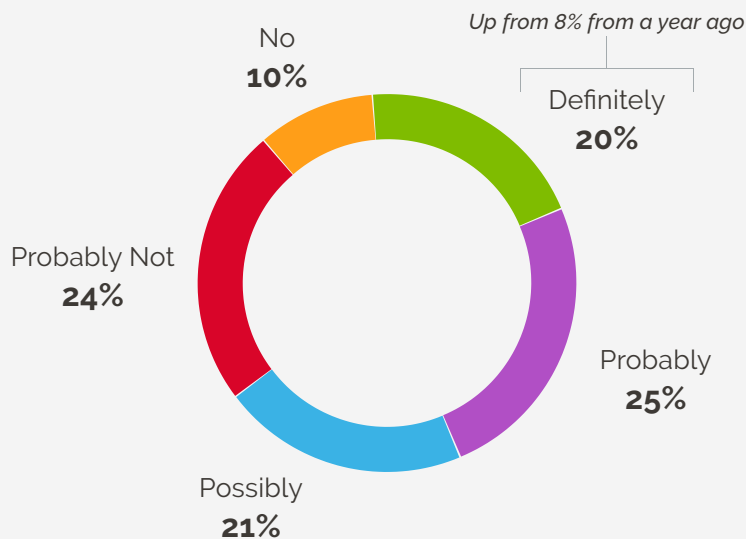
Using data to drive decision making is a common challenge for businesses across industries. *The Data Quality 2023 Study*, compiled by Software Development Times, reveals that only 16.13% of organizations consider themselves "Data Driven." More than a third of the organizations surveyed say they're at the "Data Aware" stage, which means they're just starting to recognize the importance of data integration to achieve business goals.



Source: Software Development Times, *The Data Quality 2023 Study*

Unfortunately, most restaurants are not fully leveraging the customer data they collect to drive performance. According to the *2024 Restaurant Technology Outlook* from Nation's Restaurant News (NRN), only 20% of operators say they "definitely" optimize their customer data while another 25% "probably" optimize it:

DOES YOUR ORGANIZATION OPTIMIZE THE CUSTOMER DATA IT COLLECTS?

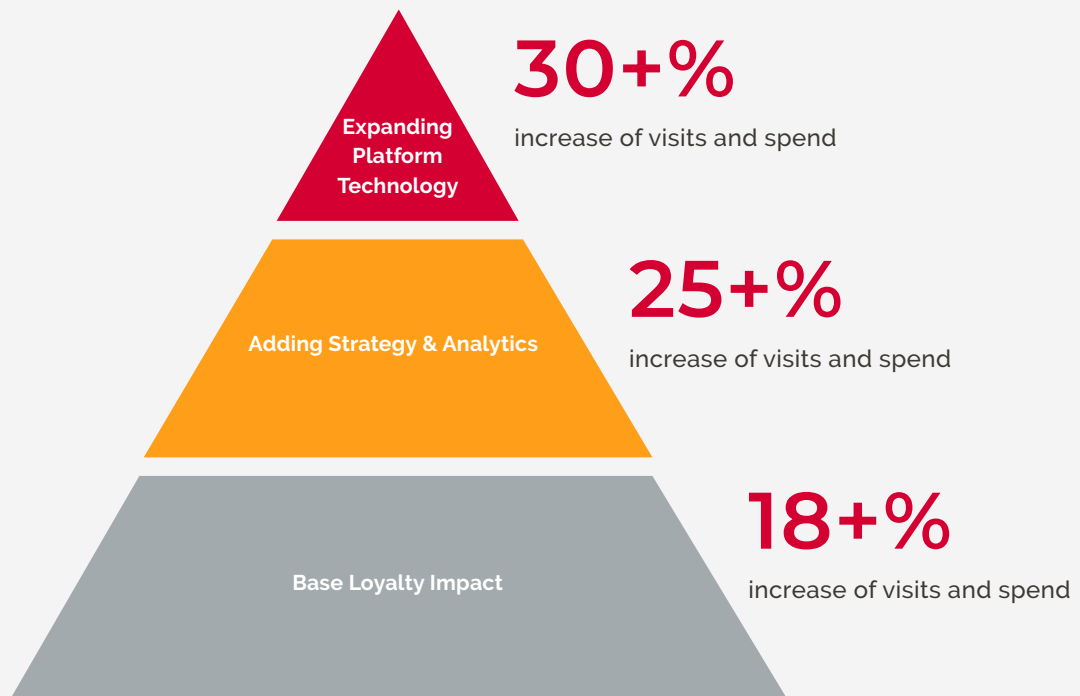


Source: Nation's Restaurant News, *2024 Restaurant Technology Outlook*

It's time for operators to get serious about data and move beyond a name, email address, and birthdate for each guest. Today's most successful loyalty programs use real-time transactional and behavioral data to create guest experiences that increase visits, sales, and CLV.



Market Insight: How Data and Technology Lift Loyalty



Based on years of data, Paytronix has determined that adding a basic loyalty program creates an 18–30% increase in spending and visit frequency among program members.

But that's just the start! Adding a team of strategy and analytics (S&A) experts who can interpret your data increases visits and spending among loyalty program members by an additional 5–10%.

And adding technology, such as a mobile app and online ordering capabilities, boosts visit frequency and spend by another 5+%.

Source: Paytronix internal analysis

Power Your Loyalty Program with First-Party Data

First-party data is the bedrock of any effective, hyper-personalized loyalty program.

It comprises all the information you collect directly from guests who come into your stores, order from you online, engage with your marketing materials, participate in your loyalty program, and use your mobile app. First-party data is directly under your control and it's becoming more important than ever to drive meaningful interactions with members.

Every guest interaction generates data you can use to develop and continually improve your loyalty initiatives. By tracking each program member's behavior, you can lay a solid foundation for personalizing the entire loyalty experience.



Market Insight: First-Party Data Boosts Campaign Effectiveness

Incorporating 1:1 targeting based on first-party data, brands can boost year-over-year loyalty spend by 16.5%. Marketable restaurant and c-store loyalty program members deliver lifetime value that's 18-24% higher than members who haven't opted in to receive loyalty program communications.



16.5%

of digital orders are from mobile apps



18-24%

higher CLV for mobile app users

Source: Paytronix internal analysis



Doing it Right: Segmentation success with first-party data

Peet's Coffee

When [Peet's Coffee](#) relaunched Peetnik Rewards on the Paytronix platform, membership increased 350% within six months. Loyalty transaction share increased by 47%, and a single offer generated more than 1.5% of retail comp sales.

Incorporate Third-Party Data to Improve Guest Engagement

Third-party data from partners enhances guest profiles with deeper psychographic, interest, and lifestyle insights. Location data may reveal routines and affinities, while demographic data can provide clarity into household dynamics.

While first-party data provides the foundation for delivering personalized guest experiences, integrating third-party data can provide an extra level of context around guest ages, genders, lifestyles, interests, and life stages. This kind of data enrichment gives you new ways to understand and target your best guests for optimal loyalty participation.

Hospitality Technology offers an example based on a collaboration between Paytronix and PYMNTS. The study found college-educated adults and consumers who earn more than \$100,000 annually exhibit the highest engagement rates (50%) with local restaurant loyalty programs:

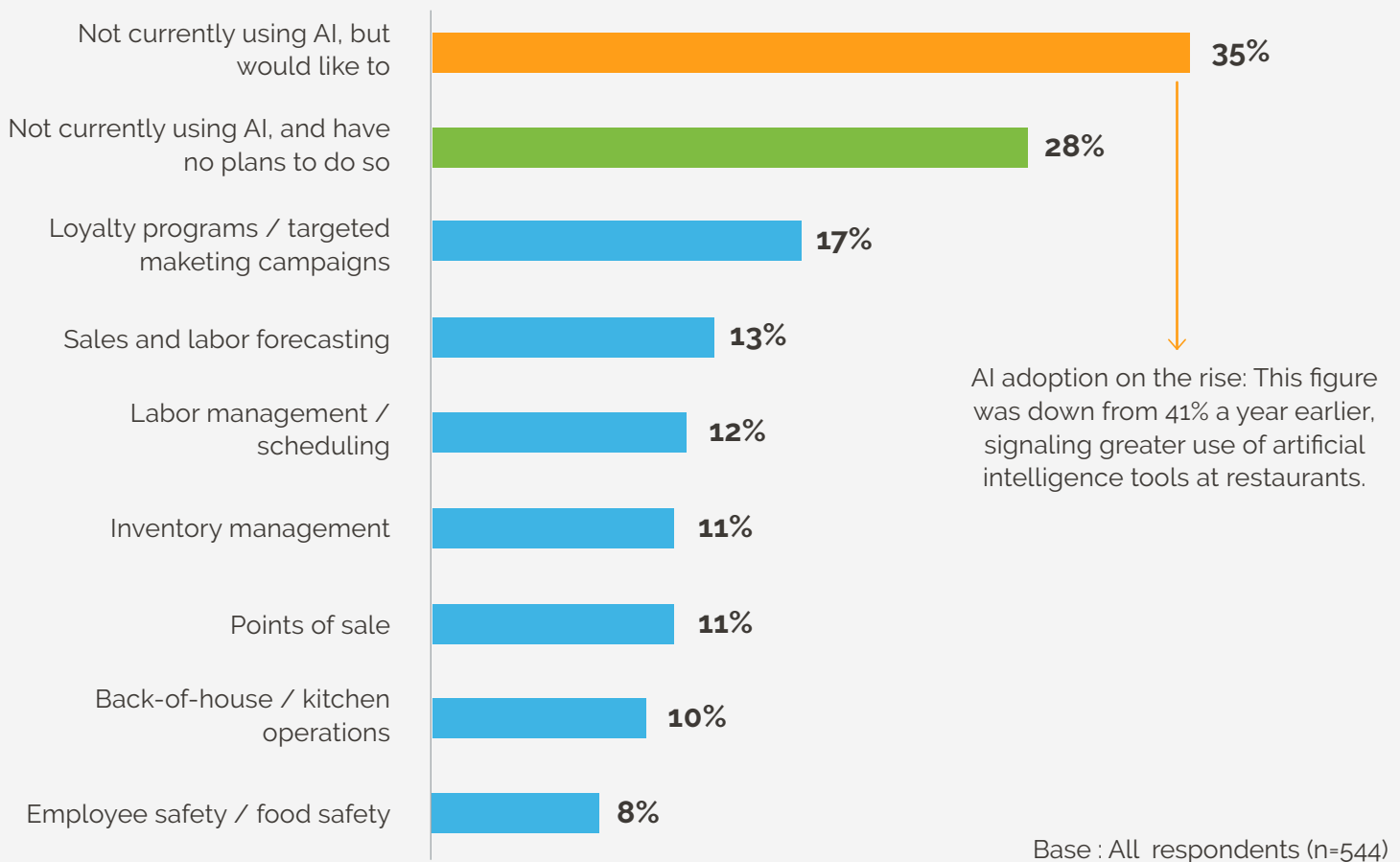
“*With data enrichment, you could identify who has a college education within your customer loyalty program and earns more than \$100,000 per year. Then you could target those customers more aggressively based on their online or in-store engagement with your brand, their purchase history, and milestones, such as birthdays.*”

How AI and Machine Learning Are Changing the Loyalty Game

With unified guest data as a foundation, restaurant and convenience store operators can make better use of AI and ML tools that drive loyalty program performance, engagement, and spend.

NRN's *2024 Restaurant Technology Outlook* shows operators are hungry for AI's advanced analytics capabilities: 37% of foodservice operators are currently using AI while 35% want to incorporate it into their business:

WHERE FOODSERVICE OPERATORS ARE USING AI IN THEIR BUSINESS



Source: Nation's Restaurant News, 2024 Restaurant Technology Outlook

Only 17% of operators use AI specifically for loyalty. Fast-casual restaurants are leaders at 25%, followed by quick-service restaurants at 18% and casual dining restaurants at 16%.

Demand for AI and ML is growing because the technology helps operators act on individual guest preferences and behaviors. Below are four examples of how AI and ML are supercharging restaurant and c-store loyalty programs with automation:

1 *Intelligent Guest Segmentation*

One of the biggest challenges businesses face with their loyalty programs is effectively segmenting customers. This is where machine learning shines. AI-powered analysis can sift through vast pools of customer data in seconds—such as purchase history, frequency, and lifetime value—to automatically surface microsegments like customers who order on Fridays at 5:30pm or those who buy a specific drink on Tuesdays.

2

Predictive Churn Analytics

Another powerful application is the use of predictive analytics to identify the risk of customer churn before it happens. Sophisticated models can analyze shifts in individual purchasing patterns and engagement metrics like visit frequency.

By detecting leading indicators of lapsing behavior, for example, operators can automatically trigger 1:1 win-back campaigns aimed at retaining their most valuable loyalty members. If a guest who previously visited twice a month suddenly goes four or five weeks without a transaction, AI can prescribe a targeted offer or incentive customized specifically for their purchase preferences.

3

Frictionless Guest Experiences

Upselling and cross-selling are crucial revenue drivers, but making relevant recommendations for individual guests is challenging. Machine learning changes that by automatically grouping menu items based on what your customers like to buy. AI models can analyze each guest's order history and taste profile to intelligently surface the most appealing items during every transaction.

For loyalty programs, this translates into opportunities to showcase members-only menus or bonus-point multipliers for trying new items aligned with preferences. According to eMarketer, 53.9% of consumers say brand recommendations make them feel recognized and appreciated.



Doing it Right: The AI advantage to drive performance

Uno Pizzeria & Grill

Uno Pizzeria & Grill, a beloved Chicago-based brand using Paytronix's Guest Engagement Platform, found guests are 2x more likely to accept AI-powered product recommendations, lifting average monthly online orders by \$125. AI automated feedback responses are driving a 29% increase in future orders.

The Rise of Next-Gen Loyalty Programs

Staying relevant in a competitive market—where 57% of restaurants and 66% of convenience stores offer loyalty programs—means providing a loyalty experience that resonates with guests in unique and exciting new ways.

Loyalty program design and reward flexibility have emerged as critical differentiators:

- 85% of adults are willing to take advantage of dining discounts during off-peak days, according to the NRA's *2024 State of the Restaurant Industry*
- 60% of consumers rate rewards like early access to products and brand experiences as important or very important, according to a Deloitte survey
- 68% of US adults like to receive offers and discounts based on their purchase history, according to eMarketer

Realigning Your Loyalty Program for Greater Relevance

The first step toward a more effective loyalty strategy is to evaluate your current program's performance. Assess key metrics like penetration, growth rate, discount levels, and whether members' behaviors align with your corporate goals.

Specific questions to ask include:

- What percentage of total revenue comes from loyalty program members?
- What's our program's net membership growth (new members minus attrition)?
- Are we over-discounting or being too generous with rewards?
- Do our members' visit patterns and spending meet our engagement objectives?



Doing it Right: Designing a winning loyalty program

Dutch Bros Coffee®

[Dutch Bros](#), a growing national coffee chain in a competitive market dominated by national brands, uses the Paytronix Guest Engagement Platform to replace its previous punch-card system and gained 1.4 million members in the first month. The Dutch Bros program uses a points-based system in which customers can earn rewards, win contests, and receive one-of-a-kind, personal, Dutch Bros experiences.

The Demand for Flexible, Value-Driven Rewards

To expand loyalty program relevance, many operators offer guests choices when it comes to redeeming rewards and incentives to qualify for higher membership tiers, like free merchandise or exclusive menus. Operators benefit from this flexibility too, as it generates strong engagement while supporting a mix of valuable redemption opportunities.

C-store loyalty participation is on par with restaurants. Convenience Store News' *2024 Realities of the Aisle* study revealed 50% of guests report being enrolled in a loyalty program when offered, and another 19% say they'd enroll if one was offered. However, satisfaction with c-store loyalty programs dropped six points to 68% from the previous year: "Less-than-satisfied loyalty program members feel rewards are not valuable to them and too many purchases are required to obtain rewards."

Recognizing these shifts in behavior, smart operators are making changes to their loyalty programs for better performance. PYMNTS noted that in 2022, Chipotle grew its loyalty program membership 20% to 31.6 million through more relevant content, targeted offers, and gamification. El Pollo Loco rolled out a new tiered program structure, while Noodles & Company made perks available daily.



Doing it Right: Encouraging members to achieve more

Break Time

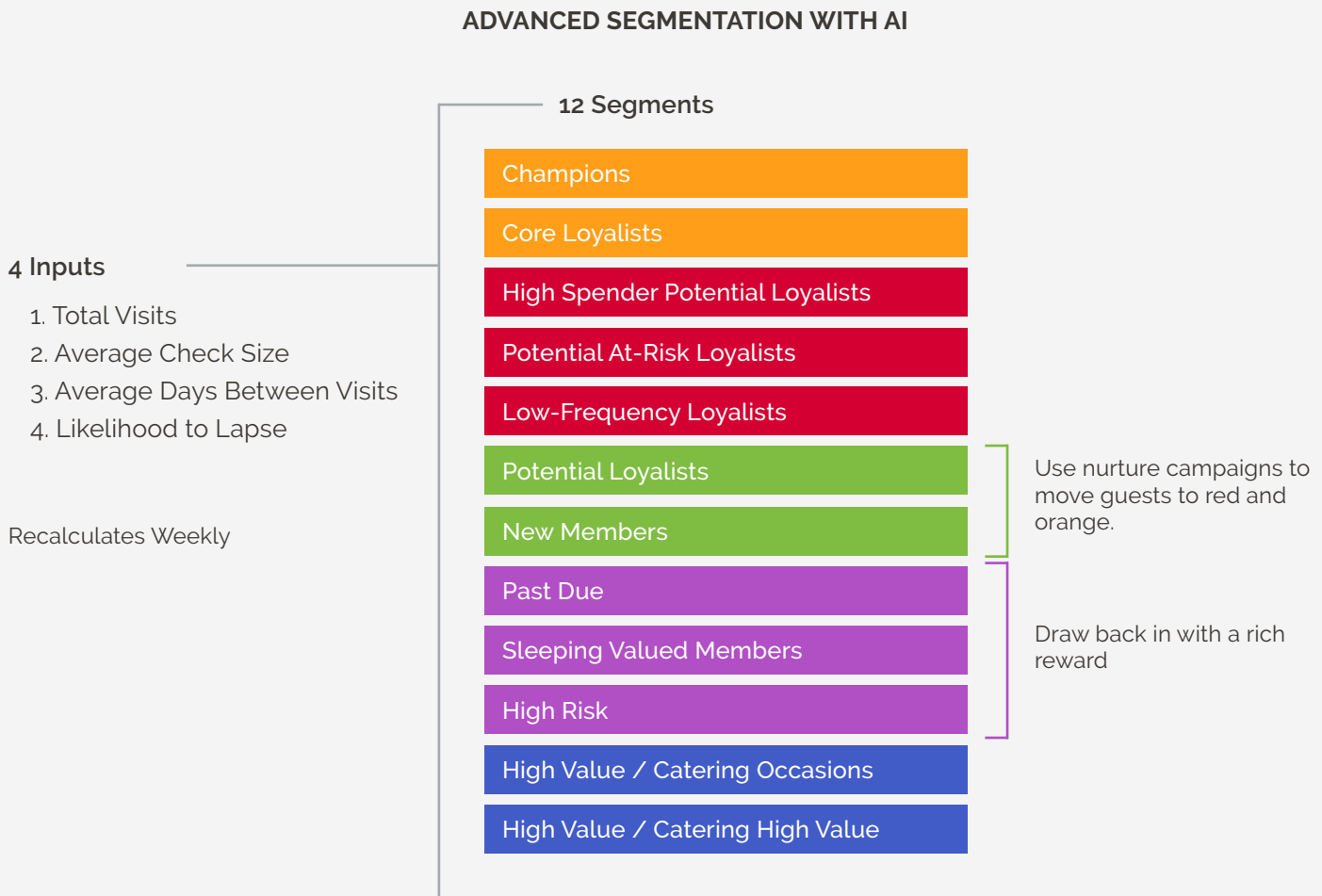
[Break Time](#), a Missouri-based convenience store, transformed its MyTime Rewards program using Paytronix with an automated tier structure rewarding frequency and spend, with members re-evaluated monthly. MyTime Rewards automatically triggers a series of personalized, action-oriented messages to members when they're nearing a new tier. And when members move up levels, congratulatory notes are automatically sent with information on new program benefits.

Designing Loyalty to Drive Engagement

At Paytronix we recommend segmenting loyalty members into four core groups based on lifecycle stages:

1. New members
2. Potential loyalists
3. Core/pro loyalists
4. Lapsing members

Operators can then build even more granular segments, tailoring specific offers, campaigns, and tactics to elevate performance within each specific cohort:



The most effective loyalty programs are designed from the ground up to foster insights into guest behavior, preferences, and core motivations. Armed with these insights, marketers can segment customers based on their current brand relationship, designing personalized campaigns that cultivate deeper loyalty, more frequent visits, and higher spend per visit.



Doing it Right: Premium subscription program delivers

HuHot Mongolian Grill

[HuHot Mongolian Grill](#), a restaurant chain founded in Montana, worked with Paytronix to introduce its BOGO Grill Pass subscription offering. For \$9.99/month, guests earn a free grill meal with the purchase of one full-priced meal. This premium offer successfully drove customer lifetime value and revenue while elevating the overall guest experience. Despite offering a high-value discount, the resulting increase in visit frequency and spend made it a worthwhile investment by striking an ideal balance between customer value and bottom-line returns.

The tactics and mechanisms that resonate with your guests will vary based on your brand's concept, service model, customer base, and financial objectives. Given the vast array of program options, it's important to lean on data and analytics to determine the best engagement strategies:

- Which reward layers and promotions will best motivate our guests?
- What tactics align with our brand identity and service experience?
- Which program elements can be realistically executed by our staff?
- What strategies will drive the highest return toward our financial goals?

Next-generation programs incorporate innovations like subscriptions, multi-tier rewards, social impact/affinity elements, exclusive menus and experiences, and gamification. These advanced tactics tap into psychological drivers like the desire for achievement, social recognition, competition, and the fear of missing out (FOMO).

Gamification is gaining traction for driving engagement. According to PYMNTS, Denny's embraced this trend in the summer of 2023 with a revamped program tailoring "challenges" to different guest segments based on dining habits. One early promotion offered a free Grand Slam breakfast to members who visited four times before the 4th of July.



Doing it Right: Gamification leads to breakthrough performance

Great Harvest Bread Co.

[Great Harvest](#), a Montana-based bakery and café, overcame slow seasons with gamified 1:1 "Visit Challenges." Using Paytronix AI to create 1:1 campaigns, Great Harvest engaged customers on a personal level and increased sales in ways it hadn't thought possible. The brand is now expanding the program with a steady rotation of personalized campaigns.

Branded Mobile Apps Deliver a Connected Loyalty Experience

In today's mobile-centric world, developing a branded mobile app gives operators the opportunity to deliver an integrated loyalty experience.

According to the NRA, 60% of current loyalty program members prefer to access their programs through a mobile app, underscoring the desire for a frictionless and on-the-go loyalty experience. These apps enable guests to track and redeem rewards points, manage gift-card balances, and receive location-based push notifications—all while fostering a sense of community around your brand.

By investing in a well-designed, feature-rich mobile app, operators can take their loyalty program to new heights and meet the evolving needs of younger, tech-savvy guests. A branded app not only streamlines the loyalty experience but also serves as a direct communication channel, enabling targeted outreach, easy location check-in, personalized offers, and real-time engagement. All of these are pivotal elements in cultivating long-lasting brand affinity and loyalty.

In the past, branded mobile apps were expensive and difficult to manage, often requiring custom development to make simple changes like updating images or offers. Building your own app or contracting the project is still expensive and time-consuming compared to partnering with a platform like Paytronix.

Our solutions allow you to make changes to your app in seconds rather than weeks and measure results as soon as you're live. Paytronix-powered apps offer a central place for guests to manage loyalty points, messaging, check-in, payments, and even online ordering.



Doing it Right: Optimizing guest engagement via branded mobile app

Alltown Fresh

[Alltown Fresh](#) is a unique concept that combines a handcrafted kitchen and market with fuel sales. Looking for a guest engagement platform that would match its brand promise, Alltown Fresh chose Paytronix to launch its online ordering and delivery service, a new guest loyalty program called Fresh with Benefits™, and a mobile app. By addressing behavior and intent, the brand dramatically improved customer engagement, driving lifetime value. Mobile and online orders quickly became a key part of overall sales.

The Shift Toward Emotional Engagement

While many operators wish to move away from discounting, transactional benefits like special pricing and points-based earnings remain core pillars of guest loyalty programs. According to Deloitte, 86% of restaurant loyalty members say earning and redeeming discounts and rewards influences their program participation.

At the same time, savvy operators recognize the need to boost stale and outdated programs with new features that increase engagement beyond mere transactions, including becoming top-of-mind for customers. While discounts are a motivational foundation, layering on unique experiences, gamification, and other personalized touches can help foster deeper emotional connections that drive enduring loyalty.

These connections are increasingly important when it comes to captivating a high-value audience spoiled for choice. The NRA reports that guests belong to an average of 3.6 restaurant loyalty programs, with Gen Z adults belonging to 4.4 programs. Deloitte found that nearly half (47%) of restaurant loyalty members use their memberships several times a month and almost a third (32%) do so several times a week.

The importance of strong and healthy loyalty programs is underscored by the fact that it's easier to keep a customer than acquire one. According to Invesp, new customer acquisition costs five times more than retention—and even a modest 5% increase in customer retention can boost profits 25–95%.

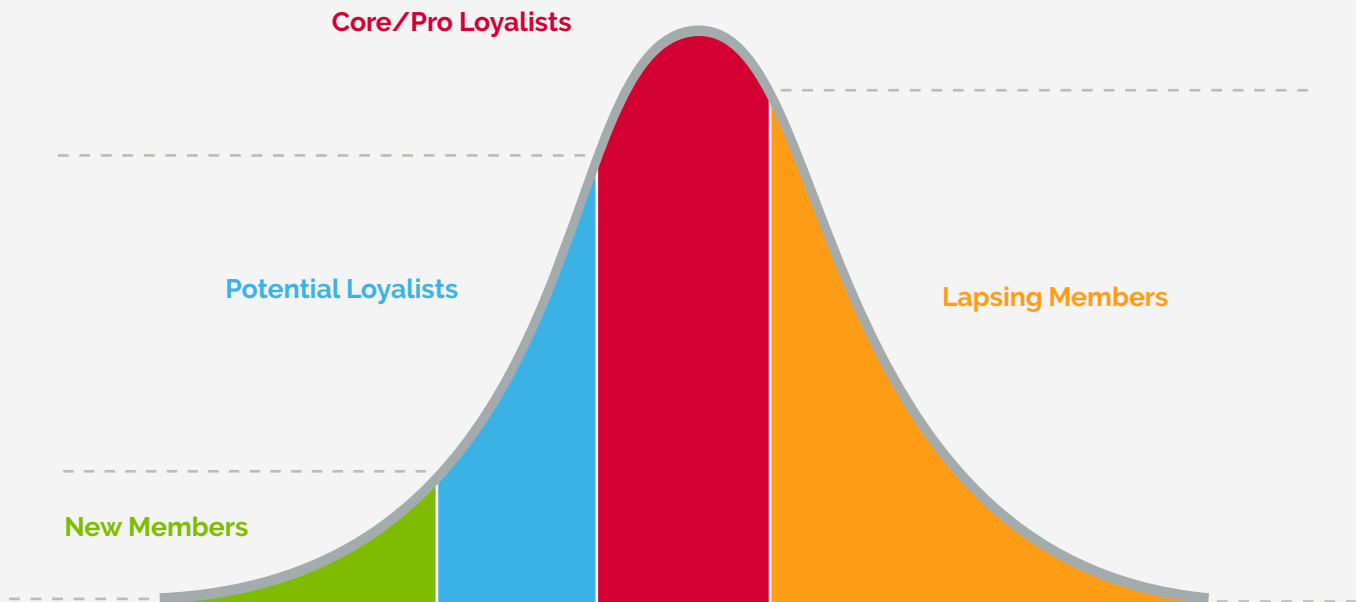
Regular guests create 80% of your future revenue, according to McKinsey & Co., so make sure you win their hearts with a loyalty program that builds your brand and delivers exceptional experiences.



Driving Members Through the Loyalty Lifecycle

While getting a steady stream of new members is an important first step in building a healthy loyalty program, true success hinges on your ability to move members into higher-value categories. If guests sign up for a loyalty program but fail to actively participate, the initial sign-up incentive has been wasted.

SEGMENTING GUESTS BY LIFETIME VALUE



For new members, educational nurture campaigns—a series of emails or text messages that enlighten recipients on a desired solution or outcome—can create stickiness. By deploying a nurture campaign that sends four reminder messages based on real-time activity, we helped one QSR achieve a 15% lift in new members hitting the three-visit mark.

Some new members may become core loyalists almost immediately while others may linger as potential loyalists for an extended period. Maintaining interest and preventing churn are paramount objectives for this critical group of potentially valuable guests, who are often motivated by:

- Surprise rewards and unexpected delights
- Exclusive access to limited-time offerings or experiences
- Tier progression opportunities with incrementally better benefits
- Gamification and achievement-based challenges

As loyalty member lapses occur, operators must also be poised to quickly identify at-risk guests and deploy 1:1 win-back strategies for those who have deviated from their regular visit pattern. Three proven techniques include:

1. Tailored incentives based on the reason for lapsing
2. Reminders of loyalty program tenure and accumulated benefits
3. Limited time offers for re-activation

Captivating Modern Guests with Three Innovative Loyalty Engagement Experiences

To truly captivate modern audiences, brands must evolve their loyalty initiatives to incorporate innovative experiences that cater to guests' desires for flexibility, personalization, and emotional connection. Implementing features like customizable rewards, values-based initiatives, gamification, and tailored surprise-and-delight moments has become essential for optimizing share-of-wallet potential.

1

Prioritizing Guest Preferences

Today's guests want flexible, personalized rewards that empower them to maximize value in preferred ways. Tiered rewards, memberships, and subscriptions cater to this, offering choice and control while driving stickier loyalty and revenue growth.

Advances in technology have enabled brands to adapt their programs to meet evolving guest expectations in real time, tailoring experiences to demonstrated behaviors. This greater flexibility and customization allow loyalty initiatives to remain relevant across diverse customer segments.

As pressures mount from continually shifting consumer habits, inflationary factors, and other economic elements such as fluctuation in consumer disposable income, changes in workforce costs, and supply chain disruptions affecting inventory levels, restaurants and c-stores must aim to build flexibility into their loyalty programs—an agile approach that recognizes the strategic value of guest loyalty as a driver of sustainable growth.

2

Shifting to Emotional Loyalty

Modern guests seek benefits that create deeper connections. This value equation factors in quality, uniqueness, experience, customer service, and community, rather than a focus on discounts alone.

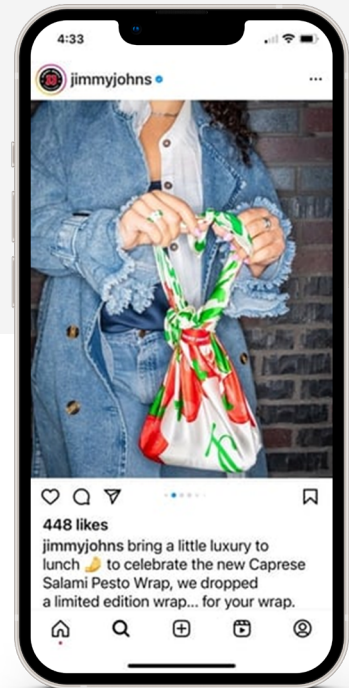
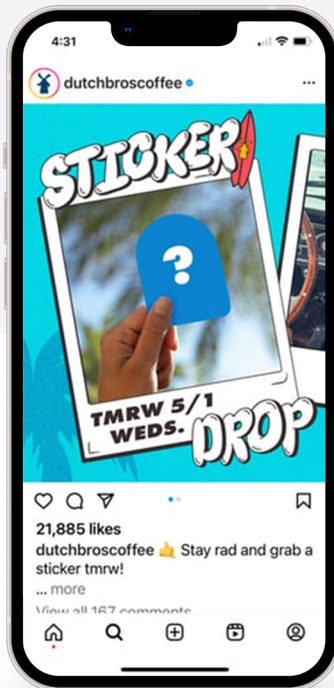
As NRN highlights, an ongoing industry debate is raging between operators who favor discounting versus those who prefer to emphasize everyday value through food quality, service speed, menu items, experience, or price.

Operators who've been taking a break from discounts argue that it improves revenue, while those who've been leaning into discount promotions say they do so to increase traffic. While operators decide which approach works best, the key to success will lie in striking the right balance between "enticing customers with deals while making sure revenue still grows."

The most successful loyalty programs blend both approaches, providing special pricing and earnings capabilities that make financial sense, complemented by engaging emotional features that elevate the overall guest experience. Deloitte pointed out that emotional benefits help operators earn greater "share of heart," which can dramatically increase CLV.

Doing it Right: Making emotional connections

- **Peet's After Dark** by Peet's Coffee is an exclusive event series featuring food and beverage influencer Olivia Noceda, who mixes signature mocktails and shares special cake recipes
- **Dutch Bros' limited-edition mystery stickers** keep engaged guests anticipating the fun to come
- **Jimmy John's** created the limited-edition **Ciao Down Silk Scarf** to promote the return of its beloved Caprese Salami Pesto Wrap and Italian heritage



The goal is to connect with loyalty members on such a deep level that they rely on your brand to make their lives easier, more fulfilling, and in some ways more complete. Here are four ways operators are making important connections with guests:

1. **Affinity programs** tap into guest passions and values by linking brands to relevant causes and facilitating community involvement, like volunteering or donations.
2. **Early and exclusive access** to new offerings, influencer collaborations, and feedback opportunities help make members feel special. According to Deloitte, 60% of consumers rate early access to new products and experiences as “important” or “very important.”
3. **Upgraded or premium service** via priority seating, carryout lines, or dedicated service channels for loyalty members can incentivize more purchases. In the same Deloitte survey, nearly two-thirds of respondents said they value this type of treatment.
4. **Partner programs** facilitate engagement with multiple brands that are meaningful for guests. For example, two loyalty program giants, Delta SkyMiles and Starbucks Rewards, joined forces in 2022 so members of both can earn one mile per \$1 spent at Starbucks and double Stars on days they fly Delta.

By carefully designing loyalty strategies around emotional connections, operators can forge longer-lasting bonds with their most valuable guests.

3 *Gamifying for Excitement*

People love to be recognized for their achievements, which is why gamification is a powerful engagement tool for restaurant and convenience store marketers. By leveraging deep insights into guest behavior derived from loyalty program data, brands can build engaging initiatives that create the excitement of competitive fun.

Challenge rewards, surprise and delight programs, and digital “treasure hunts” all provide avenues for gamification that drives engagement. For example, a coffee chain could award a special badge to members who check in for their morning drink five days in a row, then offer a surprise free drink after two consecutive weeks of the daily ritual.

A casual dining restaurant may run a quarterly game in which members earn entries into a prize drawing by trying limited-time menu items or redeeming rewards on specific days. The possibilities are endless when combining gamification elements like competition, achievement, and unpredictability.

Doing it Right: Generating excitement and engagement with gamification

These real-world examples demonstrate the impact of thoughtfully designed gamification strategies:



- **Original ChopShop's** "Four Visits Fast" challenge helped turn new loyalty members into more frequent visitors



- **Great Harvest Bread Co.** drove 35% increases in visits, frequency, and spend, using AI to create engaging, 1:1 "Visit Challenges"



- **Dutch Bros** used earned in-app stickers and other gamification elements, like connections for special offers or freebies, to revitalize its old loyalty program and gained 1.4 million members in the first month

By tapping into universal human motivations like instant gratification, social recognition, and leveraging low input for high output results, restaurant and c-store brands have another way of transcending purely transactional loyalty benefits. A gamified experience transforms loyalty programs into entertaining journeys that keep guests excited for more.

Moving Beyond One-Size-Fits-All Messaging

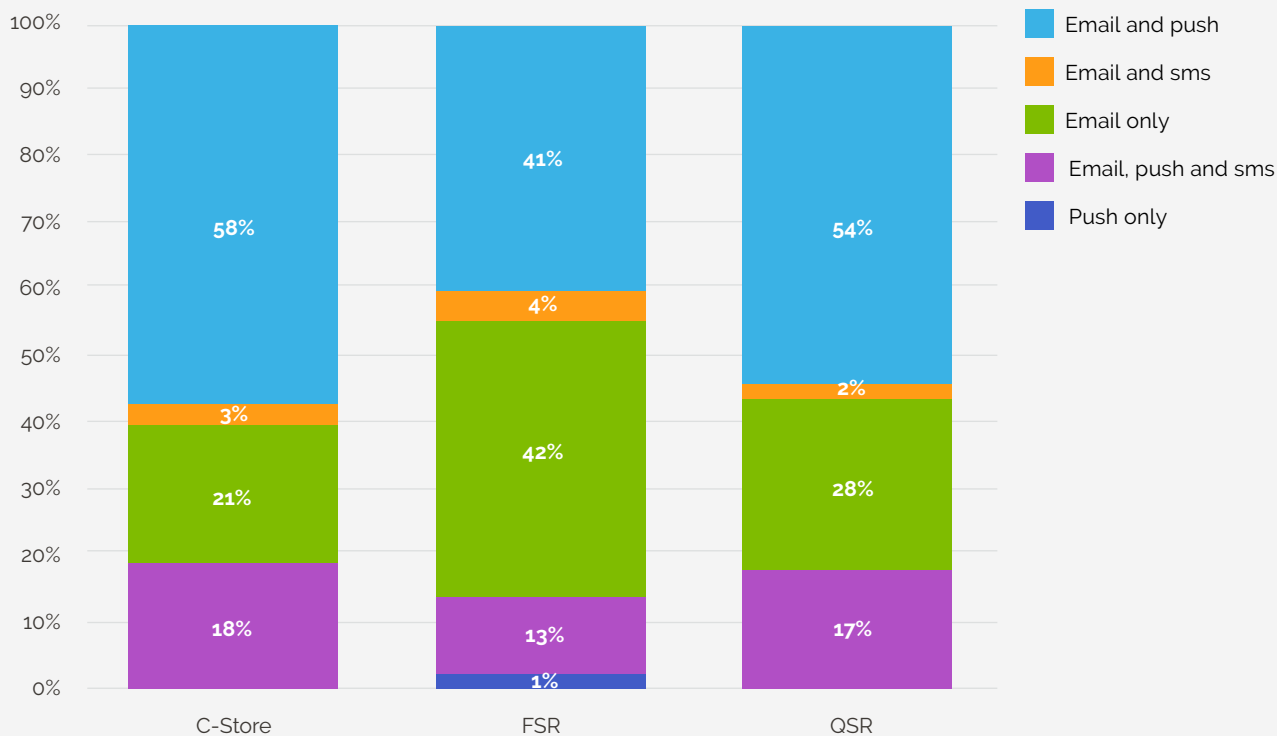
To unlock the full potential of guest loyalty initiatives, restaurant and convenience store operators must have a well-thought-out, data-driven messaging strategy that recognizes guests as unique people. Generic, one-size-fits-all communications just don't cut it because guests expect—and value—tailored experiences that cater to their individual needs and desires.



Market Insight: Brands Use a Mix of Channels to Engage Members

Email is the most used channel, but many merchants leverage mobile app push notifications to reach guests.

PERCENT OF MERCHANTS USING EACH CHANNEL AT LEAST ONCE



Source: Paytronix internal analysis of campaigns from Oct. 1-Dec. 31, 2023

By leveraging data insights and advanced segmentation techniques, brands can develop highly customized messaging campaigns that resonate with individual program members. From educational welcome messages to sincere win-back efforts to lapsed members, personalized communication drives engagement and CLV.

Meeting Guests Where They Are: Channel Optimization

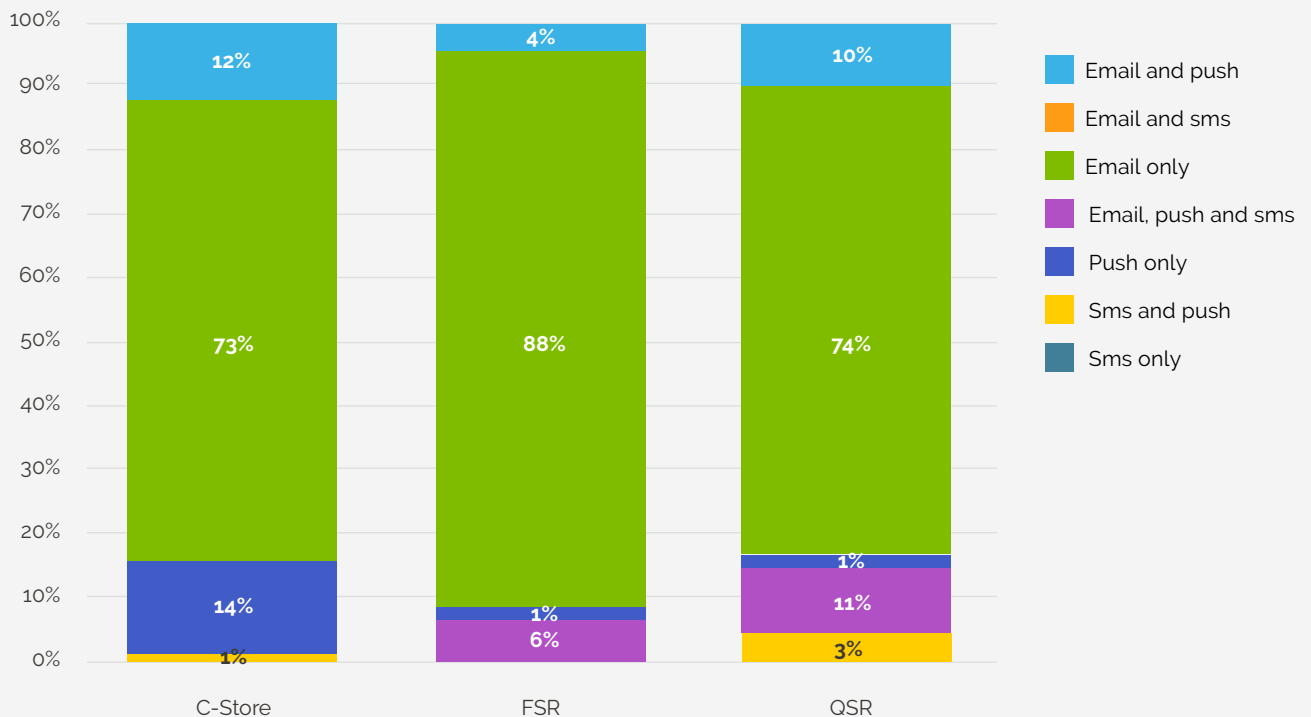
Guests interact with restaurants and c-stores in so many ways, from digital channels like email, social media, mobile apps, and websites to offline channels like in-store visits and direct mail.



Market Insight: Email Dominance Reigns Supreme

More than 80% of campaigns rely on email to engage guests. Although campaigns that include mobile app push messages represent over 20% of campaigns for QSR and c-stores.

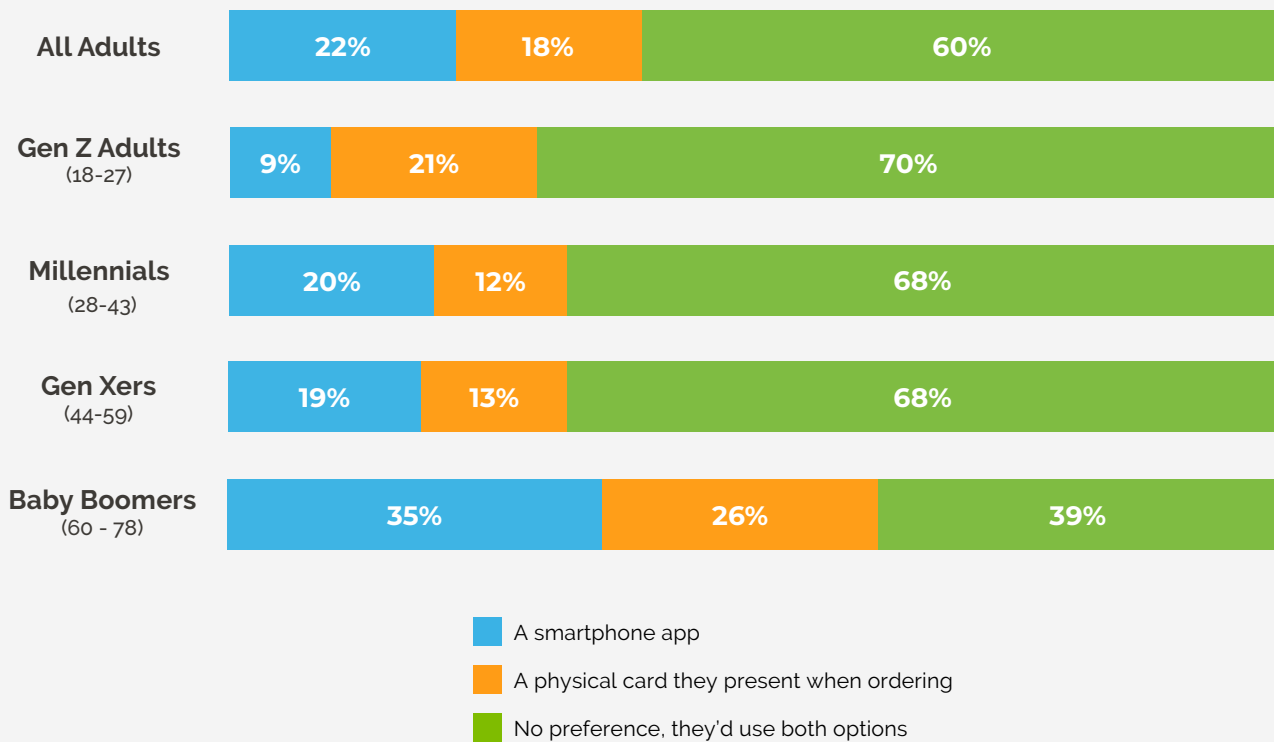
PERCENT OF CAMPAIGNS BY CHANNEL USED



Source: Paytronix internal analysis of campaigns from Oct. 1-Dec. 31, 2023

While most of these channels—especially email—are embraced by almost everyone, research shows some correlation between age and preferred loyalty channels. Gen Z adults, Millennials, and Gen X guests, for example, all express a stronger preference for mobile apps than Baby Boomers, according to the NRA:

HOW LOYALTY PROGRAM MEMBERS SAY THEY WOULD PREFER TO PARTICIPATE IN THE PROGRAM



Base: Consumers who currently participate in a restaurant loyalty reward program

Source: National Restaurant Association, 2024 State of the Restaurant Industry

Operators that ask guests to opt into different communication channels when they join a loyalty program accomplish several important goals. First, you gain valuable insights into member preferences. Second, you make people feel good right away by showing you want to meet them where they are. And third, you can save money if you know who doesn't want to receive certain types of messages.

Data-Driven Messaging

Collecting insights from your most valuable guests is one of the most important benefits of a successful loyalty program. By gathering information at registration and monitoring ordering and spending habits on a regular basis, operators gain a greater understanding of each guest's preferences and motivations.

Using machine learning tools and advanced segmentation techniques, marketing teams use these insights to create targeted campaigns that resonate.



Doing it Right: Advanced segmentation powers 1:1 messaging

PDQ

[PDQ](#), a restaurant chain competing in the dynamic chicken sandwich market, used Paytronix's advanced segmentation tools to translate detailed data from more than 350,000 loyalty members into actionable analytics. Paytronix's 1:1 capabilities have enabled PDQ to craft personalized offers that drive engagement at every level of the MyPDQ program.

Successful Messaging Strategies

As soon as a guest joins your loyalty program, your messaging can go a long way toward keeping them engaged and coming back for more. Here are seven examples of how to carry momentum throughout the loyalty lifecycle:

1

Welcome Messages

For new members, a well-crafted welcome message is essential for explaining program benefits and generating excitement. You can even expand the opportunity with a nurture campaign that guides new members through the early stages of their loyalty experience with a series of educational components and offers.

We helped one QSR build a successful campaign around a series of tutorial videos, which resulted in a 15% lift in new members hitting the three-visit mark.

2

Registration Reward Reminders

Offering a special reward for new members after they sign up is a great incentive, but some guests need a little gentle pressure to follow through. Don't be shy when it comes to making sure your guests don't miss out: Our proprietary data shows that getting guests to their first reward quickly increases stickiness.

Good candidates for registration rewards are popular items with high margins. A high-margin item ensures your locations don't take a hit from guests who show up for the free reward and then stop engaging.

3

Almost-There Messages

When guests are one visit away from reaching their next reward level, an almost-there message can be the nudge they need to place an order. We've discovered it's best to send these offers via email and include images of the reward your guests will receive, plus their current point balance.

Just by sending reminder messages to guests who were one visit or purchase away from a reward—with no additional incentive—we helped one QSR brand achieve a 5.5% visit lift.

4

Reward Expiration Reminders

A well-timed reminder that a reward is about to expire can prompt a visit to one of your locations. Just make sure you send it a few days in advance of expiration to give your customers time to prepare.

5

You Earned It Messages

Loyalty program members love to see their visits pay off, and sending a congratulatory message when they've achieved a reward is a wonderful way to connect. This message, which can be sent by email or text, should show the reward and state when it expires.

6

Post-Visit Thank-You Notes (with Surveys)

Expressing gratitude for—and soliciting input from—your loyalty program members are great ways to keep them engaged. Surveys should be short and simple, and when you get a response be sure to thank them.

7

Surprise and Delight Campaigns

Unexpected rewards build emotional connections with guests, so make sure you leverage this powerful tactic, [like PDQ did](#).

Other Messaging Opportunities

Here are some additional ways you can make sure your communications resonate with loyalty program members:

Milestone Celebrations

Personalized messaging for special occasions like birthdays and anniversaries is a staple of many loyalty programs. Tiered loyalty programs build in even more opportunities to recognize members for their achievements.

Victory Dances

Gamification elements, such as badges and challenges, can also be powerful motivators and great ways to recognize and reward achievement.

Social Sharing

Don't underestimate the power of your most loyal guests to promote your brand. Encouraging guests to share their loyalty program achievements can amplify the reach of your program and create a sense of FOMO among non-members.

Rapid Response

Effective communication in a loyalty program isn't just about what you say, it's also about when you say it. Timing is everything, and the most responsive operators will ensure their messaging remains relevant and impactful to each guest.

Risk Mitigation

Targeted "we miss you" and bounce-back campaigns that include limited-time offers are powerful tools for reactivating lapsed members and those who might be flight risks. By monitoring individual visit cadences and tailoring your messaging accordingly, you can increase the chances of retaining members and winning back lapsed guests before they're gone for good.



Doing it Right: 1:1 win-back offers re-engage lapsed members

Primanti Bros.

Sandwich shop [Primanti Bros.](#) uses our AI tools to identify and re-engage lapsed guests with targeted win-back offers. The effort has been shown to lift frequency by 90% and spend by 50%.

Loyalty Trends in Action: Real-Life Success Stories

The key trends shaping the future of loyalty marketing are fundamentally interconnected. Personalization requires robust data and analytics capabilities. Innovative program design unlocks new engagement opportunities. And effective communication ensures that loyalty innovations resonate.

Many brands are achieving success by implementing current loyalty trends in unison as part of a holistic loyalty transformation. Here's how some of our clients are pioneering this integrated approach.

Personalization Powerhouses

Several top brands are seeing huge loyalty lift by making personalization a core priority. They understand the value of making guests feel known, appreciated, and understood through individualized touchpoints.

- **Peet's Coffee** relaunched Peetnik Rewards on the Paytronix platform leveraging AI-driven customer insights to deploy uniquely personalized offers. Within six months, membership skyrocketed by 350% while transactions from loyalty members rose 47%.

"With Paytronix, Peet's tests and measures everything with control groups and we talk with our team about how best to structure offers," said Lisa Regelman, Director of Loyalty at Peet's. With that kind of oversight, the brand was able to generate 1.5% of retail comp sales from a single personalized offer.

"We can see how frequently customers come in and what they like to buy, and then target campaigns in a more one-to-one manner," Regelman said.

- **Dutch Bros** made a successful transition to a digital-first loyalty program with personalization front and center. The brand acquired 1.4 million new loyalty members in the first month alone, attributing the success to its newfound ability to create offers based on well-defined audience segments and nurture individual guest journeys in real time.

Dutch Bros uses a points-based system that lets guests earn rewards, win contests, and have one-of-a-kind experiences. Paytronix data-driven insights, AI and machine learning technology, and comprehensive campaign capabilities helped the brand win back more than 220,000 lapsed loyalty members.

While coffee outlets are great candidates for loyalty programs because so many guests are daily visitors, loyalty is just as important—if not more so—for other types of restaurants and c-stores.

- **Alltown Fresh®** seamlessly integrated loyalty with online ordering, gaining a much better understanding of its guests and the convenience they crave. The brand encourages Fresh with Benefits members to engage through a mobile app that also makes it easy to place orders and buy fuel without touching a PIN pad.

"[It's] a game changer," said Joanna Linder, Alltown Fresh's Vice President of Marketing.

- **Smashburger** is a restaurant brand that's taken personalization to new levels, with granular guest targeting based on known behaviors and preferences. By addressing behavior and intent, the brand dramatically improved customer lifetime value, with mobile and online orders quickly becoming a key part of overall sales. Looking to meet aggressive same-store sales growth objectives, the chain used its loyalty data and Paytronix's ML tools to create personalized, one-to-one marketing campaigns.

The new paradigm resulted in a 20% lift in spend, a 16% lift in visits, and an incredible 61x ROI. "Offers are tied to core behavior so that guests get what they love," said Lexi Ryan, Loyalty Manager. "We want them to make their experience personal."

Successful campaigns have included:

- A veggie burger offer for guests who don't consume beef
 - Preferred birthday rewards
 - A free order of fries for trying a new menu item
 - Triple points for ordering online
 - Double and triple points for Gold and Platinum members
- Chicken sandwich maker **PDQ** leveraged Paytronix's advanced segmentation tools to deliver personalized loyalty offers. "We're able to execute incremental, revenue-driving programs that enable us to punch above our weight," said Jimmy VanValkenburg, who runs the MyPDQ loyalty program.

Using several different tactics, VanValkenburg and his team are getting great results:

- **15.5% spend lift** from a visit challenge campaign.
- **23% spend lift** from an ongoing win-back campaign designed to reduce loyalty churn.
- **10% visit lift** through a champions' campaign targeted at MyPDQ's most active members. The campaign also generated valuable earned media through widespread social media sharing.

Data and Analytics: The Personalization Foundation

Of course, effective personalization strategies require unified customer data and advanced analytics muscle. Many brands are now leveraging AI to identify patterns, extract insights, and automate smart segmentation.

- **Primanti Bros.** uses Paytronix AI to calculate "Missed Visit scores." With this information, the brand automatically re-engaged lapsed or at-risk loyalty members with targeted win-back offers aimed at reducing churn.

The ongoing campaign segments guests who miss one or more visits into three groups that get offers for \$5, \$8, or \$10 off their next purchase within seven days, no strings attached. The campaign has lifted frequency (90%) and spend (50%) and has achieved an impressive average re-engagement rate (16%) compared to similar industry campaigns (13%).

Next-Gen Program Design: Redefining Loyalty

With personalization and analytics as the foundation, leading brands are reimagining loyalty itself through innovative new program models designed to drive deeper engagement.

- **HuHot Mongolian Grill** rethought guest stickiness by introducing a subscription element—the "BOGO Grill Pass." For \$9.99 monthly, participating guests earn a free grill meal with every meal purchased. Despite the high-value discount, the resulting frequency and spend increases generated a significant lift in customer lifetime value and revenue: Compared to regular HuHot Rewards members, BOGO Grill Pass members spend 6 times as much during their first six months.

HUHOT REWARDS MEMBERS SPEND:

\$43.60

IN THEIR FIRST SIX MONTHS OF THE PROGRAM

BOGO GRILL PASS MEMBERS SPEND:

\$279.05

IN THEIR FIRST SIX MONTHS OF THE PROGRAM



BOGO GRILL PASS MEMBERS PROVIDE

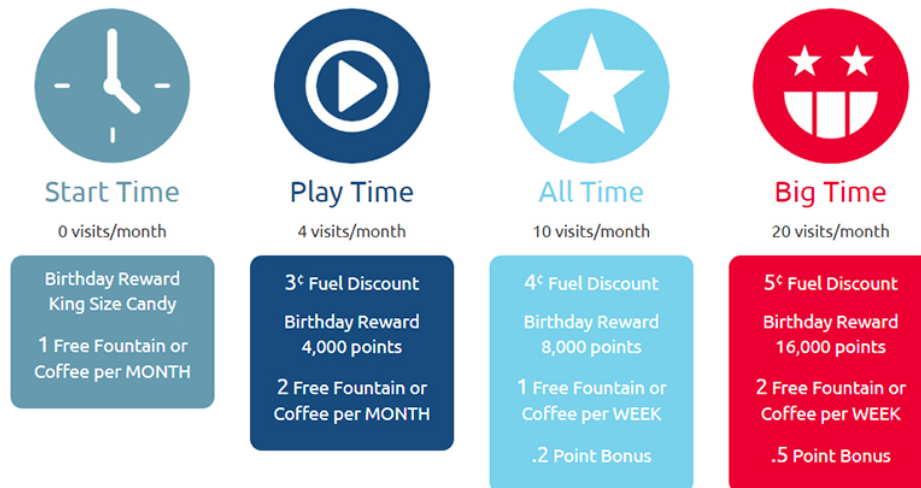
6x

THE VALUE

OF REGULAR LOYALTY MEMBERS

- **Break Time**, a convenience store chain, took a different approach and redesigned its MyTime Rewards program through an automated, multi-tier structure that awards members based on their individual buying behavior. Personalized messaging guides members along the loyalty path, encouraging them to reach new tier levels—and celebrating when they do.

Soon after launch, 12,000 guests achieved top-tier status and loyalty members were responsible for 42% of all transactions. A 25.6% spend increase and a 2% increase in gas gallons pumped have been attributed directly to the program.



Boosting Engagement through Gamification

With strong personalization and program design as the backbone, brands are layering on innovative engagement tactics like gamification to forge even deeper customer bonds.

- **Original ChopShop** creatively combined targeted incentives and challenges within their loyalty program. Highlights include a 21% breakfast sales lift from a "Rise + Shine" campaign and more than 63,000 app downloads—with \$116,794 in pre-loaded funds—from a six-week "Fuel the Season" initiative.
- **Jimmy John's** took gamification to new levels with an audacious "Try Everything" promotion, challenging Freaky Fast Rewards® members to purchase all 25 core menu sandwiches. Those who completed the task received a special Achievement Badge called The Gauntlet, as well as a Jimmy Chips beanbag chair.
- **Sweetgreen** revamped its entire loyalty program under the "Rewards + Challenges" umbrella, engaging members to complete tasks (e.g., spending \$20 or adding a side item) for offers like a \$4 credit or a free beverage. Sweetgreen co-founder and CEO Jonathan Neman said, "We see Rewards + Challenges as a way to double-down on owned digital relationships and create a more personalized experience for our customers."

The Power of Effective Communication

Of course, even the most brilliantly personalized and gamified loyalty innovations require clear communication to drive adoption and engagement. Strategic messaging is key for these pioneering brands.

- **Great Harvest Bread Co.** uses Paytronix AI to create exciting 1:1 challenges for members. By making goals attainable and nudging guests with fun and aspirational prompts the program grew visits, frequency, and spend by 35%.

"Before Paytronix, we struggled with slow seasons," said CEO Mike Ferretti. "By leveraging 1:1 campaigns, we engaged customers on a personal level and increased sales in ways we hadn't thought were possible. More campaigns and opportunities like this will only help grow our business and the future of our guest engagement strategy."

Conclusion

Embracing Loyalty Innovation for Sustainable Growth

Restaurant and c-store loyalty marketing is evolving rapidly, driven by shifting consumer expectations and powerful new technologies. As this report has shown, leading brands are pioneering innovative strategies across personalization, data analytics, program design, emotional engagement, and targeted messaging.

By leveraging advanced tools to understand customers at a granular level, high-performing operators are delivering hyper-relevant experiences that drive visit frequency, spend, and lifetime value. They're reimagining loyalty itself with flexible models like subscriptions and tiers. And they're forging deep emotional connections through meaningful and often unexpected brand interactions.

The common thread? A commitment to using data-driven insights to create personalized, value-added experiences for each guest. That's the key to standing out in a world where the average consumer belongs to nearly 17 different loyalty programs across industries.

As evidenced by our real-world success stories and market insights, a holistic approach to loyalty delivers powerful results. Brands that embrace loyalty innovation at every level are achieving double-digit lifts in key metrics like spend, visits, and retention.

Now is the time to assess your loyalty strategy, align with the current trends, and turn your program into a true competitive advantage—one that not only drives short-term metrics but also builds lasting, profitable bonds.



To learn more about how Paytronix can take your loyalty program to the next level, [**book a demo**](#) now.

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