

The Collinson Loyalty Landscape 2024

Travel, Transport & Hospitality Sector Insights



This infographic offers a summary snapshot of the 2024 Travel Transport and Hospitality Loyalty Landscape, highlighting key trends across the sector. See how loyalty programmes compare in data strategy, value exchange, member experience, and technology for quick insight into the future of loyalty in TTH.

Data Strategy

- 66% use data to inform customer strategy
- 62% use data to inform wider business decisions
- 94% are either using or planning to apply data to personalise and create trigger content, offers, and communications
- 68% are using data to report on programme performance
- 66% are not using data to monetise via third parties, with nearly 20% not even thinking about it.

94%+ of TTH companies surveyed are using or planning to apply data to personalise.

Commercial

Revenue and cost tracking

- 52% track revenue at a high level and 32% at a granular level.
- 46% track costs at a high level and 41% at a granular level.
- 10% don't track revenue or costs in line with a P&L for a loyalty programme.

Primary responsibility for tracking

37% of the TTH sector say the Loyalty & CRM team is responsible for financial management.

Value Exchange

Member vs. non-member rewards

REWARD TYPE	OVERALL	TTH
Points or equivalent	78%	75%
Member pricing or discounts	75%	80%
Access to member only competitions and prize draws	70%	66%
Member only or early access to offers on own brands	69%	70%
Free gifts	66%	67%
Exclusive content	65%	62%
Exclusive or upgrade services for all registered members	63%	69%
Exclusive or upgrade services accessible through tiers	60%	58%
Member only or early access to partner offers	55%	49%
Special interest groups or clubs	52%	43%

Selecting members for special value

- 57% say members receive the same value from the program regardless of behaviour
- 66% say members receive more value the more they spend with us
- 64% say members receive more value if they generate more profit or based on behavioural proxies for profit
- 46% say members receive value based on predictions of how much they will spend in the future
- 48% say members receive value based on their non-transactional engagement
- 59% say it is based on member tenure with the program.

Member Experience

Ease of member account access

- 46% say it is very easy for members to access their accounts via the Website, overall 81% said members had easy access
- Overall, 63% say members had easy access through a dedicated loyalty programme mobile app. With 36% saying Very easy access however, 14% say it is not easy to access
- 66% say members could easily access loyalty account integrated into mobile app for products and services
- 57% say members could access account via the contact centre, 25% said it was very easy access
- 68% say members could easily access account at point of purchase / customer service channels, however, 11% say it is not easy to access
- 39% said member could access their accounts easily with 3rd party partners / channels / suppliers, however 26% say it is not easy to access

Member experience channels

- 81% Say email communications are important with 42% saying very important
- 60% Say mobile push communications are important, however 16% say it is not important
- 73% Say website and / or mobile app personalization is important (38% Very important)
- 54% Say Text communications are important however, 18% say it is not important
- 65% Say using Social channels is important (31% Very important)
- 56% Say display / programmatic advertising is important
- 52% Say Contact centre / IVR channels / Wechat are important, however 15% say it is not important
- 65% Say In-store / Face-to-face (e.g. self-service kiosk, customer service staff) channel is important (34% Very important)
- 41% Say using 3rd parties channels is important, however 21% say it is not important

Lifecycle communications

76% of TTH companies apply a welcome journey.

Member lifecycle comms plan

- Only 14% say they have a member lifecycle plan in place and always use it
- 53% who often use it
- 23% who sometime use it.
- 7% rarely use it
- Overall, 67% have a member lifecycle plan and use it more than often implying that automated trigger communications set
- 9% rarely or never use a lifecycle / comms plan

What types of member lifecycle communications are used

- 75% apply a welcome journey
- 73% run milestone triggers, tier progression, completing profiles etc
- 73% apply an activation mechanic based on behavior
- Collectively 59% have at risk comms - where members are in danger of lapsing and (59%) have lapsed or reactivation lifecycles in place

Technology

Does your technology provide the functionality and capability needed for best-in-class programme?

Platform capabilities
We asked respondents what capabilities they have access to:

CRM Platform 17% of TTH respondents say they don't have a CRM platform and 8% have it on their roadmap in the next 2 years, collectively 71% are currently implementing or using a CRM platform.	Member Access / ID Management 57% of TTH respondents say they are currently have some form of member access / ID management (App higher than average), and 25% currently implementing and 8% have it on their roadmap in the next 2 years, collectively 82% are currently implementing or using it.	Configurable tiering system 40% of TTH respondents say they are currently have a configurable tiering system, and 23% currently implementing and 15% have it on their roadmap in the next 2 years, collectively 65% are currently implementing or using it.
Integration with External Third-Party Banks 30% of TTH respondents say they are currently integrated with External Third-Party Points Banks, with 21% currently implementing and 18% have it on their roadmap in the next 2 years, collectively 51% are currently implementing or using it.	Points Engine Calculation (PCE) 42% of TTH respondents say they have a points calculation engine, with 21% currently implementing and another 17% planning on implementing in the next 2 years.	<p>42% of TTH respondents say they have a points calculation engine.</p>
Rewards catalogue configuration 38% of TTH respondents say they have a rewards catalogue configured with their program, with 26% currently implementing and another 14% planning on implementing in the next 2 years.	Third-Party Reward Integration Capability 35% of TTH respondents say they have a rewards catalogue configured with their program, with 13% currently implementing and another 19% planning on implementing in the next 2 years collectively 48% are currently implementing or using it.	
Real-time account updates Only 44% of TTH respondents say they have real time account updates, with another 25% currently implementing and 20% planning on implementing in the next 2 years.	E-commerce engine Only 43% of TTH respondents say they are currently have an e-commerce engine, and 27% currently implementing and 15% have it on their roadmap in the next 2 years, collectively 61% are currently implementing or using it.	
Campaign management/Customer Data Platform capability 42% of TTH respondents say they currently have a campaign management / customer data platform, and 25% currently implementing and 21% have it on their roadmap in the next 2 years, collectively 78% are currently implementing or using it.	Member portal 62% of TTH respondents say they currently have a member portal, and 9% currently implementing and 9% have it on their roadmap in the next 2 years, collectively 71% are currently implementing or using it.	Promotional rules engine 41% of TTH respondents say they are currently have a promotional rules engine and 27% currently implementing and 16% have it on their roadmap in the next 2 years, collectively 71% are currently implementing or using it.
Data analytics & reporting tool 53% of TTH respondents say they have a data analytics & reporting tool configured with their program, with 25% currently implementing and another 12% planning on implementing in the next 2 years.	Affiliate Mall 30% of TTH respondents say they have an affiliate mall configured with their program, with 23% currently implementing and another 10% planning on implementing in the next 2 years.	Multi-channel accessibility 34% of TTH respondents say they an multi channel accessibility with their program, with 21% currently implementing and another 27% planning on implementing in the next 2 years.
Card linked offers 40% of TTH respondents say they an multi channel accessibility with their program, with 22% currently implementing and another 13% planning on implementing in the next 2 years.	Out of the box integration 25% of TTH respondents say they are currently have a OOTB integration and 22% currently implementing and 11% have it on their roadmap in the next 2 years, collectively 47% are currently implementing or using it.	Member Service Centre 48% of TTH respondents say they an MSC with 24% currently implementing and another 12% planning on implementing in the next 2 years.

82% are happy with their program system integration

Program integration

- Overall, 82% are happy with their system integration
- 25% say their system integration is excellent their systems are connected and can easily share relevant data required for optimal program management, operations, and reporting and therefore, fit for purpose
- 57% say the system integration is good, all connected but complex requirements have to be managed manually
- 16% say there is room for improvement, some systems are connected / automated, but most need to be manually processed to deliver or connect functions
- Only 3% say their system integration is poor, majority of their requirements are manually processed and barely no connectivity of systems

Ease of applying changes to program rules / campaigns via technology

- Overall, 87% can manage changes to program rules and set up and implement campaigns themselves
- 52% say their tech requires training but can be manage admin functions which is acceptable to them
- 35% say they have an admin interface so they can make small changes and can manage campaigns with out IT support
- 8% say they are completely dependent on other departments or agencies to set up / implement campaigns
- 5% say it takes a lot of effort to make any changes

Technology satisfaction to operate loyalty program

- Only 27% say they are extremely satisfied with the technology and have strong support from the tech teams to operate the program
- 65% say they are satisfied and have relative support from the tech teams when needed
- Overall, 92% say they are satisfied with the technology to operate the program

Execution

How do you make it all happen seamlessly, and what resources do loyalty teams lean on?

Member of the leadership team with responsibility for the loyalty program	83% In place today 14% Need to be identified	2% Outsourced 2% Not covered
Program manager with overall responsibility for program performance	62% In place today 21% Need to be identified	9% Outsourced 8% Not covered
Strategic function responsible for program development	60% In place today 19% Need to be identified 19% Outsourced	0% Not covered 2% Don't know
Function responsible for data analytics and reporting	70% In place today 14% Need to be identified 11% Outsourced	3% Not covered 3% Don't know
Function responsible for sourcing and managing 3rd party partnerships	43% In place today 24% Need to be identified	29% Outsourced 5% Not covered
Technical function to support the set-up and development of relevant CRM and loyalty technology	64% In place today 25% Need to be identified	8% Outsourced 3% Not covered
Communications function to plan program communications	75% In place today 13% Need to be identified 13% Outsourced	
Content development function to source, create and make content available for personalised communications	54% In place today 19% Need to be identified 19% Outsourced	4% Not covered 4% Don't know
Campaign management function to set up and deliver communications	74% In place today 15% Need to be identified 12% Outsourced	
Operations function to manage member service queries, contact centre	76% In place today 12% Need to be identified	6% Outsourced 6% Not covered
Finance / Revenue management function, (responsible for programme P&L)	74% In place today 4% Need to be identified	13% Not covered 9% Don't know
Other (please specify)	100% Not covered	

Want to know more? Get in touch.



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