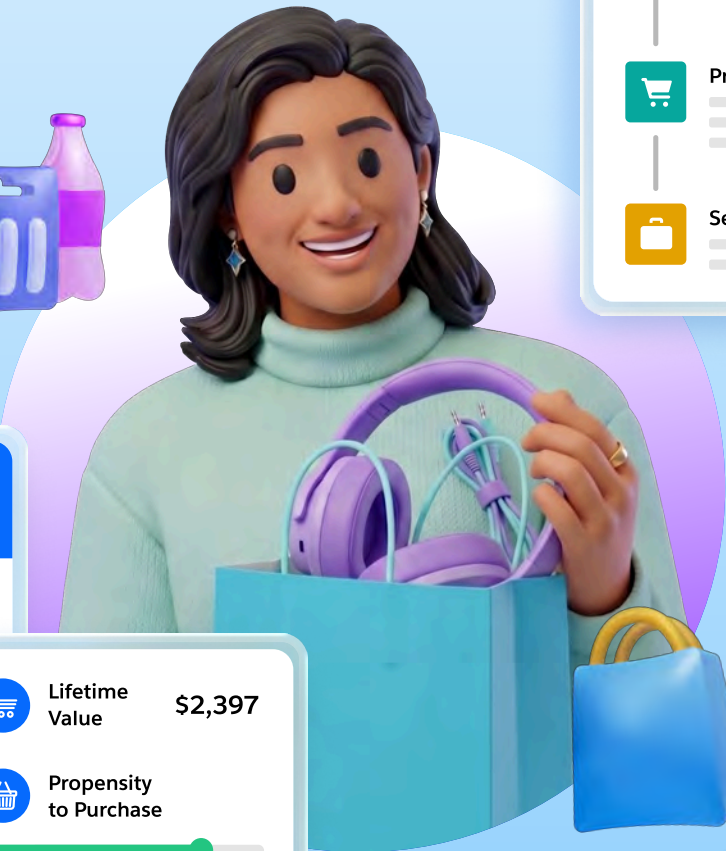








# The new loyalty landscape

How retail and consumer goods brands turn loyalty into growth




-  **Email Opened**  
\_\_\_\_\_
-  **Product Purchased**  
\_\_\_\_\_
-  **Service Case Closed**  
\_\_\_\_\_


 **Lauren Boyle**  
Austin, TX

Customer ID \_\_\_\_\_

Email \_\_\_\_\_

Phone Number \_\_\_\_\_

 **Lifetime Value**     **\$2,397**

 **Propensity to Purchase**

\_\_\_\_\_



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# Loyalty is harder to win, easier to lose — and more critical than ever to get right

Loyalty is like a conversation. Most brands are good at starting one, but too often they forget what was said the moment the channel changes and expect the customer to start over. A conversation that keeps resetting is not a relationship. It's a script.

Brands have more customer data than ever – but data alone doesn't create loyalty. The challenge isn't knowing more; it's doing more with what they already know. Customers leave signals everywhere, revealing intent, purchase history, service friction, and channel behavior. Too often, brands still struggle to turn those signals into something timely, useful, or worth coming back for.

That gap – between what brands know and what customers experience – is the loyalty gap. Closing it takes more than better data or more messaging. Retail and consumer goods brands must move beyond older models and rethink what loyalty can do.



When shoppers are prepared to switch, the gap becomes hard to ignore. Points, promotions, and program structure still matter, but they no longer define the full relationship. Loyalty now succeeds or fails across the customer experience – from discovery and checkout to service, returns, and the moments between purchases – that determine whether a brand still feels worth choosing.

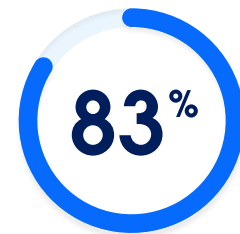
Agentic loyalty is part of the shift. Instead of waiting for static campaigns or delayed follow-up, agentic loyalty uses AI to recognize intent and act on it in real time – surfacing a relevant offer, resolving friction faster, or adapting the experience while the customer is still deciding.

Loyalty is harder to win, easier to lose, and more critical than ever to get right. Customers are more price-conscious, less patient, and quicker to switch when experiences feel disconnected. To close the loyalty gap, brands need to rethink loyalty across the full customer experience – starting with how customers themselves have changed.

## 01 Customers are rewriting the rules of loyalty

Loyalty has become more conditional. Customers are quicker to compare, quicker to switch, and less likely to stay out of habit alone. Price is still consequential – and often the deciding factor. But price alone doesn't explain the whole relationship. Customers may click for value, yet they return for experiences that feel easier, faster, and more worth returning to.

Discovery no longer starts in one place, and it rarely unfolds in a predictable sequence. More than half of shoppers use social platforms to discover products: **25% buy through social media, and 16% buy through messaging apps.** AI is beginning to shape those early decisions as well: **39% of shoppers have used AI to discover new products, rising to 54% among Gen Z shoppers.** The path to purchase now looks less like a straight line than an ongoing cycle of browsing, comparing, validating, and deciding.

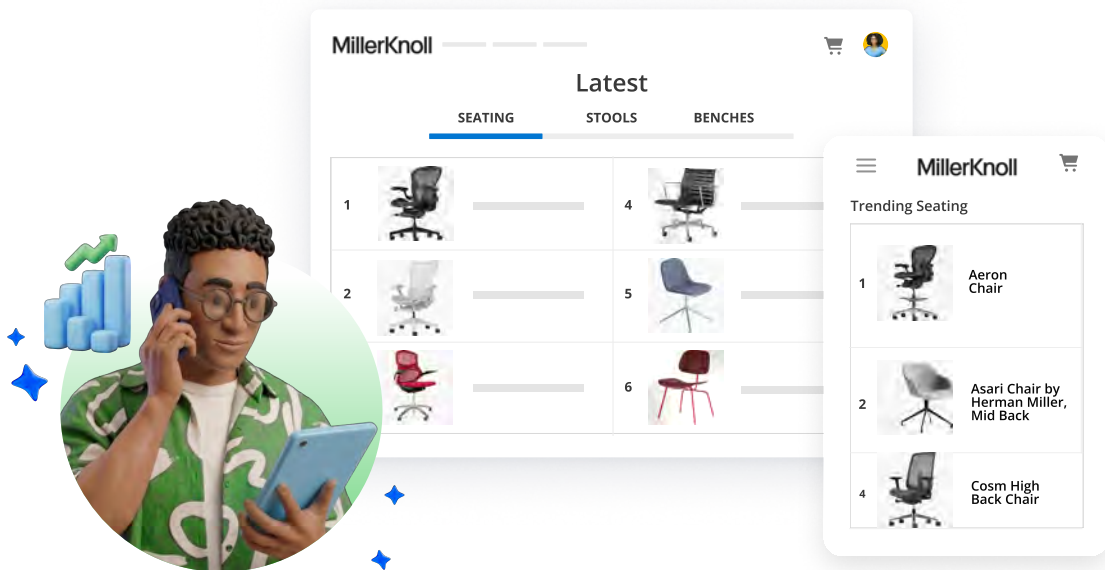


**of retail sales still  
happen in-store**

## The new loyalty landscape

Brands begin to lose ground when the experience stops feeling connected. Customers do not experience marketing, commerce, loyalty, and service as separate functions; they experience one brand. They expect to feel recognized whether they're discovering a product, checking out, contacting support, or making a return. A points balance helps, but it can't compensate for a clumsy site, a disconnected return, or a support interaction that makes them start over. That's why loyalty now depends as much on convenience, continuity, and responsiveness as on rewards – and why older, channel-first models struggle to keep up. Loyalty is less about one-off transactions and more about the brand's ability to keep earning its place across a fragmented, fast-moving customer experience.

For retailers, the immediate task is to identify where that experience still resets – and fix the points of friction that make customers feel like strangers again.



## Questions worth asking now:

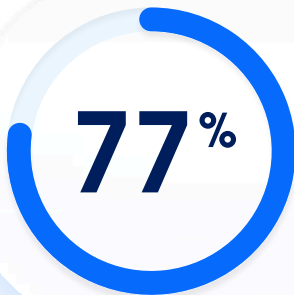
- Where does loyalty break down first in the current journey: discovery, conversion, fulfillment, or service?
- What would have to change for customers to feel recognized across the full journey, not just inside the program?
- Which friction point could you redesign in the next 90 days to make loyalty more visible in the experience?

## 02 Loyalty is becoming the coordination layer across the business

Loyalty is moving beyond the program. Leading brands are structuring it as the coordination layer across the broader customer relationship.

The shift is bigger than a program refresh. Traditional loyalty models were largely transactional: customers earned points, brands sent promotions, programs drove repeat purchases, and teams optimized redemptions. Those mechanics still matter, but they no longer define the full relationship. The more compelling opportunity is to build a membership strategy that creates value across every touchpoint – through points, perks, relevance, recognition, access, exclusivity, experiential rewards, service, advocacy, and the overall quality of engagement.

Program scale says less than it once did about program strength. Broad membership can create the impression of momentum even when engagement is shallow. Salesforce shopper research reflects that tension clearly: **77% of shoppers belong to at least one loyalty program, yet 35% belong to a program they have never used. At the same time, 84% of loyalty program members say those programs make them more likely to repurchase.** The more useful measure isn't how many people joined – it's the value the program creates for the business and the customer once they do.



**of shoppers belong to at least one loyalty program, yet 35% belong to a program they have never used. At the same time, 84% of loyalty program members say those programs make them more likely to repurchase.**

## The new loyalty landscape

The coordination layer becomes clearer when it shows up in action. A loyalty-aware checkout can recognize tier status and available benefits before a purchase is complete. A return can update customer context, trigger a service recovery action, adjust loyalty engagement, and inform the next marketing moment automatically. A referral can become more than a one-off link – it can become a tracked, rewarding exchange for both the advocate and the new buyer. In this model, loyalty is no longer a standalone program; it's a connected system for managing the relationship.

First-party data is still foundational, but it's not the finish line. The bigger challenge now is activation across a broader ecosystem: channels, brands, partners, and adjacent signals that need to work together if the experience is going to feel timely and coherent. This is especially true in consumer goods, where the loyalty challenge often extends beyond the end consumer into retailer relationships, trade programs, partner activation, and route-to-market execution. **52% of CG leaders say routes to market are increasingly complex**, which helps explain why loyalty cannot be treated as a narrow marketing-side program. It has to connect to the wider system that determines whether the customer experience gets delivered well at all.



## Questions worth asking now:

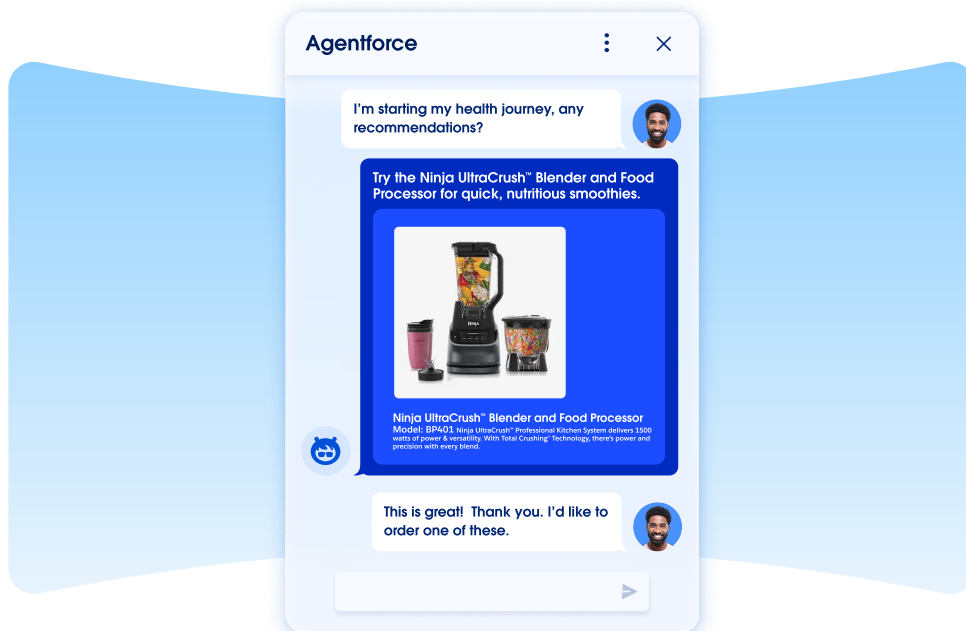
- Are you measuring member value or just member volume?
- What would change if loyalty became a coordination layer across marketing, commerce, service, and partner relationships?
- Where could you pilot a more coordinated loyalty experience in the next 90 days?

# 03 Closing the loyalty gap requires three connected capabilities

For loyalty to hold across acquisition, engagement, service, and retention, brands need to do three things well, and do them together:



These capabilities define the shift from transactional loyalty to connected loyalty. They also set a clearer standard for what modern loyalty requires: not just more data, more campaigns, or more automation, but a system that can sense, understand, and respond in ways customers notice.



### **RECOGNIZE what's happening while the moment still matters**

Loyalty weakens when the brand reacts too late. A customer may be hesitating at checkout, navigating service friction, or showing signs of intent across channels, but if that signal arrives after the decision is already made, it does little to shape the relationship. Time to offer and response time are strategic measures for exactly that reason: they show whether a brand can respond while the opportunity is still alive. The data foundation enables that speed, connecting fragmented signals into a shared, real-time view of the customer so marketing, commerce, loyalty, and service teams can respond from the same context instead of partial views. One example is checkout: an AI agent can detect hesitation from a high-value customer and generate a margin-aware loyalty offer before the session ends.

### **UNDERSTAND the customer across the journey**

Recognition is not enough if context resets every time the channel changes. Customers shouldn't have to start over when the relationship moves from marketing to commerce, from commerce to service, or from digital to store. Unified customer profiles need to function as working views of the relationship, not just reporting assets. The challenge is not whether customer data exists; it's whether the right teams can use it where decisions are being made. Retailers increasingly view unified commerce as critical, yet only a small share of store associates have access to a unified view of customer data. Shared customer understanding creates value only when teams can work from the same context with confidence.

### **ACT to turn that understanding into visible value**

Customer understanding only creates value when it shapes the experience. Offers, recommendations, service responses, and next steps need to match the moment while it still matters – and show up in ways customers would recognize as genuinely valuable. Those actions also need to feel trustworthy. Relevance without transparency can feel intrusive, and personalization without customer choice can feel manipulative. Strong privacy and security protections, clear disclosure, approval before purchase, and access to human support are part of what makes intelligent action feel credible rather than invasive.

Across Salesforce, those capabilities show up in commerce, service, marketing, loyalty management, and referrals. Commerce supports more informed purchase decisions. Service brings customer context into support moments, so resolution feels faster and more complete. Marketing extends that same logic into journey orchestration and engagement. Loyalty management and referral capabilities help teams launch programs faster, surface relevant promotions, generate offer copy, and extend value into advocacy without relying on manual handoffs.

## Agentic loyalty in action

- A guided shopping interaction uses past purchases, current intent, and available inventory to narrow options in real time.
- An agent dynamically swaps a standard discount for a more profitable loyalty perk – such as expedited shipping or early access – based on live behavior and inventory constraints.
- A resolved service case triggers an immediate make-good offer – such as bonus points or a relevant discount – while the interaction is still fresh.
- A high-value customer showing signs of lapse is identified early, and an AI agent launches a retention flow tailored to purchase history, channel behavior, and likely reasons for disengagement.
- A loyalty member nearing a tier threshold receives a timely nudge – such as accelerated earning on the next purchase or a reminder of unlocked benefits – before the window to convert closes.
- An AI agent continuously adjusts the mix of offer, perk, timing, and channel based on live performance signals – improving loyalty outcomes without relying on manual campaign tuning.

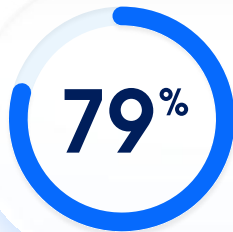
## Questions worth asking now:

- Which of these three capabilities is the weakest link today: recognize, understand, or act?
- What would change if the same customer context stayed visible across marketing, commerce, loyalty, and service?
- Which case could prove the value of a more connected loyalty model within the next quarter?

## 04 How modern loyalty creates value across the customer journey

Modern loyalty matters most when customers can feel it across the experience, not just inside the program. It's here that the strategy either proves itself or falls flat. The strongest brands don't confine loyalty to a rewards dashboard or a points balance; they make it visible in discovery, commerce, service, and the moments in between.

Loyalty starts earlier than many brands think. It shapes how customers discover products, what they notice, and whether the brand feels relevant before a transaction even begins.



**79%** of consumers say they expect active demonstrations of value and understanding from the brands they are loyal to.

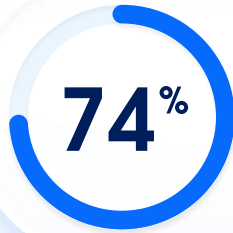
This expectation raises the bar on discovery and engagement from the start. Relevance cannot wait until checkout; it must show up while customers are still deciding what deserves their attention.

Commerce is where brands must prove that understanding in practice. A loyalty member browsing online should be able to see relevant rewards, available benefits, and tailored offers reflected natively in the experience rather than buried behind separate logins, manual steps, or disconnected systems. The same customer context should carry into checkout, fulfillment, and store interactions so the experience doesn't reset when the channel changes. Connected commerce helps make that continuity possible. It's also why 30% of global shoppers already use LLM chat assistants while shopping in-store, rising to 41% among millennials and Gen Z. As customers become more comfortable with guided, conversational experiences, the advantage will go to brands that can make those experiences feel coherent across digital and physical touchpoints.

Service is often where loyalty is won or lost most visibly. When support feels slow, disconnected, or repetitive, goodwill erodes quickly.

## The new loyalty landscape

Faster answers, smoother returns, and more informed support signal that the brand recognizes the customer and values their time. This isn't just about resolving problems; it's about whether recognition, speed, and continuity hold up when the relationship is under pressure.



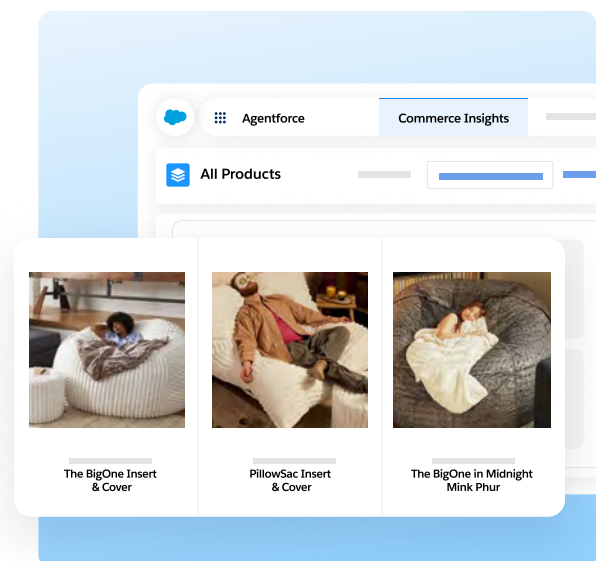
**74%** of shoppers say they will abandon a brand after three or fewer bad experiences.

For consumer goods brands, the customer relationship extends beyond the end consumer into a broader partner ecosystem. Retailer relationships, partner activation, trade promotion, and route-to-market execution all shape whether loyalty creates measurable value. That expands the definition of value beyond points or discounts. In some cases, value still means points or dollars. In others, it means access, speed, service, visibility, exclusivity, convenience, or stronger execution across channels. The business case is already evident: **AI- and data-driven promotions rank first in ROI among CG trade-promotion tactics, and 88% of CG leaders believe AI agents will help increase sales.**

Salesforce helps brands turn connected loyalty into a more seamless customer experience. Across engagement, commerce, service, and partner operations, the goal is to make loyalty visible where customers and partners experience it most directly – not as a separate layer, but as part of how the relationship works.

Over time, the strongest loyalty experiences will feel less like programs customers have to navigate and more like an adaptive layer across the relationship. Recognition, benefits, service recovery, and partner value will surface in the right moment and channel, with less effort from the customer and less manual coordination from the business.

This is what modern loyalty looks like at its best: not a separate program running beside the experience, but value woven directly into it.



## Questions worth asking now:

- Where does loyalty show up clearly in the journey today – and where does it disappear?
- What would the customer experience feel like if loyalty were visible in discovery, purchase, fulfillment, and service instead of only inside the program?
- Which part of the journey would create the most value if it became more connected tomorrow?



## Start where the loyalty gap is most visible

Brands do not need to modernize everything at once. Start where the loyalty gap is easiest to see and easiest to prove: a late offer, a disconnected service interaction, a broken return, or a partner program still held together by manual workarounds.

The brands that pull ahead will not be the ones with the most points, the most promotions, or the most customer data. The winners will be the ones that turn customer understanding into relevance, and relevance into value customers can genuinely feel.

Customers are no longer *joining* loyalty. They are *judging* it in every interaction.





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