

Restaurant

Loyalty Frontier

Conducted by:

Restaurant Loyalty Specialists

Strategic Loyalty Consulting for
Restaurant Brands

APRIL 2026



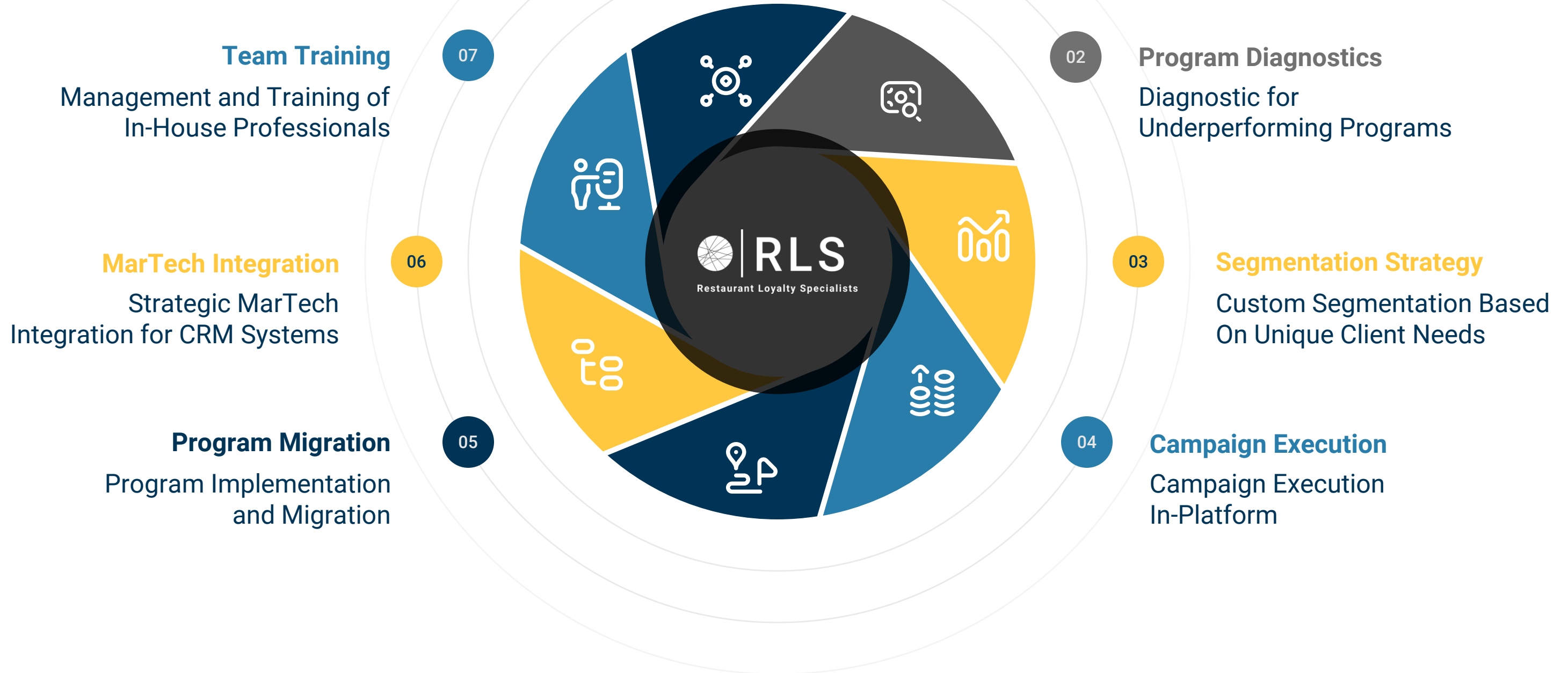


We help optimize loyalty programs and build personalized, segmented marketing for your restaurant brand.

Some Of The Platforms
We Specialize In



Our Expertise



Restaurant Loyalty Frontier: Executive Summary & Methodology

The "Great Disconnect"

Core Finding: The industry is defined by a massive gap between **aspiration** (1:1 personalization, seamless omnichannel experiences, scientific ROI) **and operational reality** (batch-and-blast, data silos, resource constraints).

The Consensus: Loyalty is no longer a differentiator; it is "table stakes." The challenge has shifted from launching a program to justifying its cost and complexity in a high-inflation environment.

Methodology & Cohort

Data Source: Qualitative interviews with ~50 restaurant loyalty practitioners (CMOs, VPs, Directors).

Scope: Diverse mix of QSR, Fast Casual, and Casual Dining brands

Researched Themes: [Personalization](#), [ROI Measurement](#), [Tech Integration](#), [Program Evolution](#).

Emerging Themes: Mid-market squeeze, data ownership tension with franchisees and omni-channel disillusionment.

The Restaurant Loyalty Frontier: Who We Heard From

50+ Industry-leading perspectives from C-Suite and Senior Strategy



Executive Leadership Variety

100% Senior Leadership & Strategic Roles

Interviews featured CEOs, CMOs, SVPs, and Directors of Loyalty and Digital Strategy.



Diverse Restaurant Sectors

QSR, Fast Casual, and CDR Representation

Insights span across Quick Service, Casual Dining, Coffee, and Sports Bar segments.



Operational Scale

National and Global Market Reach

Respondents represent major Enterprise and Medium-sized brands operating across US regions and international markets.



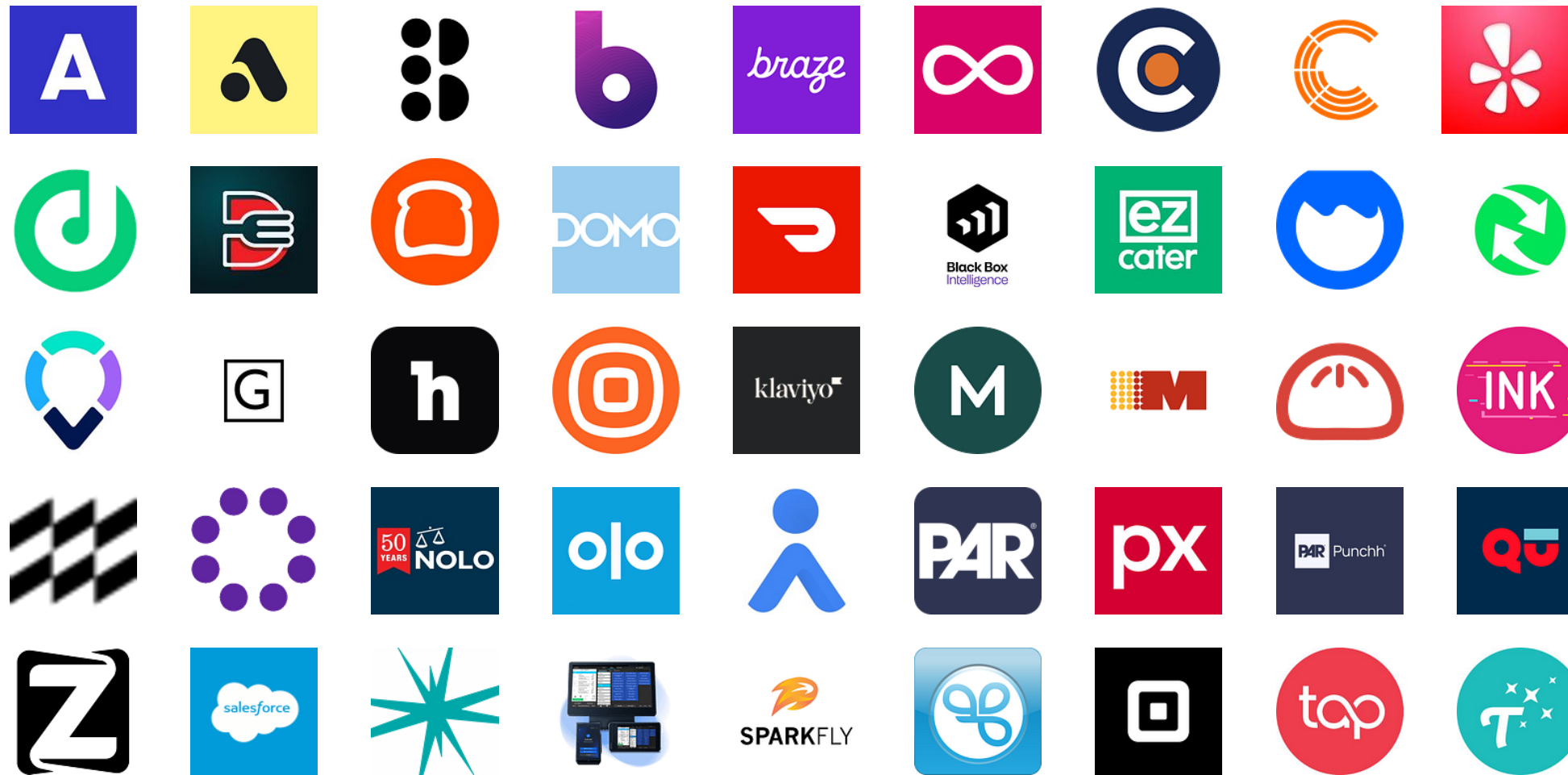
Ownership Models

Franchised vs. Equity Perspectives

The list includes a balanced mix of franchised, equity-owned, and hybrid business models.

Tech Partners and Agencies

Mentioned by respondents during interviews.





Personalization



The consensus has shifted from "we need to personalize" to "we can't afford to personalize at the level we want."

Personalization: The Highlights



The Reality: Batch And Blast



The Holy Grail: Product Propensity



The Final Frontier: The In-Store Blind Spot

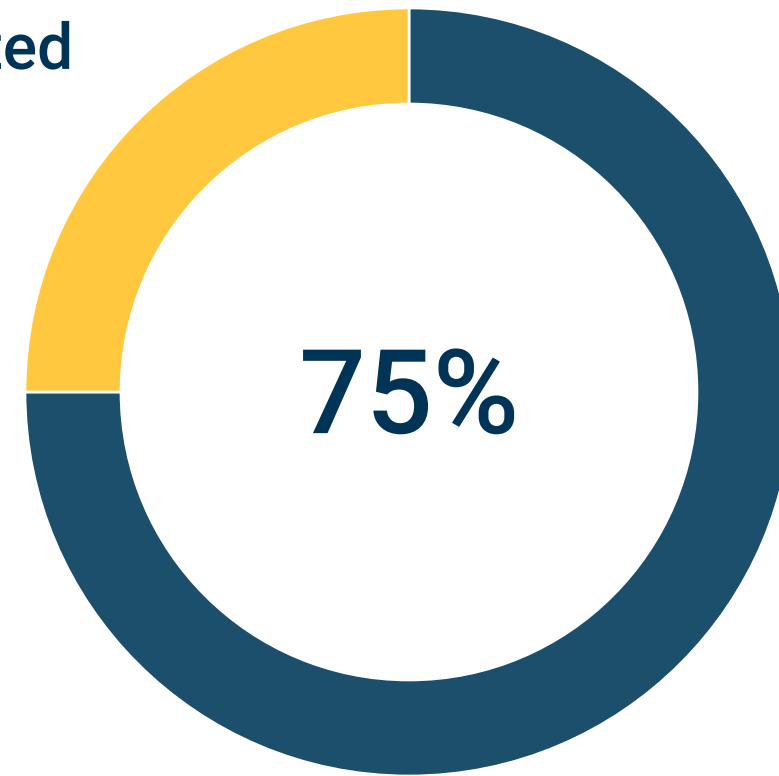
“Batch And Blast“, Most Of The Time

Ask:

Are you doing "Batch and Blast" or RFM/Behavioral/Propensity-Based targeting?

Targeted

Batch and Blast



Insight: Most brands rely on basic lifecycle segments due to resource constraints.

Reach Usually Beats Guest Preference.

Ask:

Do you utilize Channel Preference segmentation versus sending all communications to all available channels?

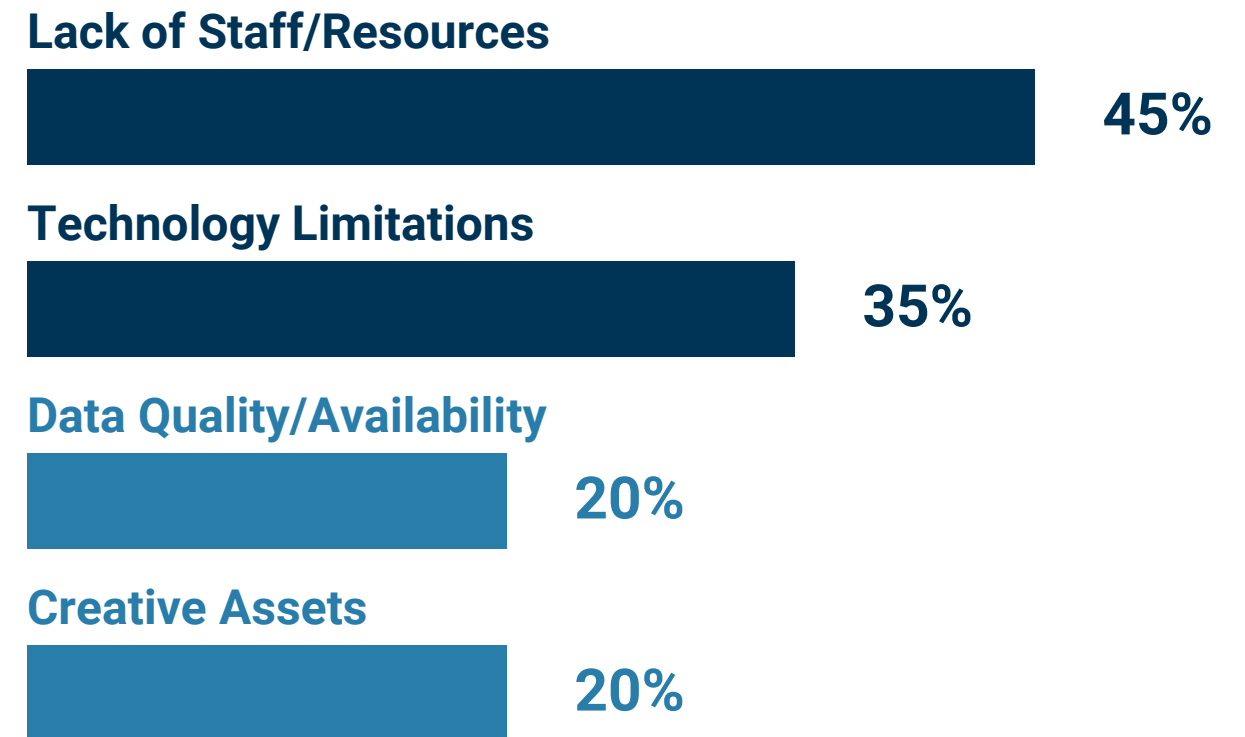


Very few operators suppress channels based on user preference or engagement history.

The Roadblocks to Advanced Personalization.

Ask:

What are the most commonly cited barriers to advanced personalization?



Small teams and fragmented, cumbersome tech stacks prevent manual execution of complex segmentation.

The Reality: "Batch and Blast" vs. The Dream



The "One-to-One" Myth and Tech Infrastructure Reality

A dominant theme across multiple interviews is the recognition that true, one-to-one personalization remains largely an illusion for most brands. Executive leaders express frustration that despite having access to data, the technological infrastructure and human resources required to execute micro-segmentation are prohibitive.



Mass Communications Still Rule:

Many interviewees frankly acknowledge that their current strategy relies heavily on mass communications. The overarching aspiration is to migrate away from these "batch and blast" tactics toward behavior-triggered, hyper-relevant communications, though achieving this requires skipping rungs on the technological maturity ladder.



The barriers:

CRM technology complexity, Content development, Project Management, and Analytical resources.

Direct Quotes

Speak for themselves

“

"Everyone's been talking about one-to-one for forever. The data is there, and technically we have the ability to do it, but it's actually much harder in practice."

VP Marketing, 80+ unit Fast Casual

“

"Unless a segment contains at least 10,000–40,000 people, the ROI does not justify the creative and analytical resources required to target them"

CMO, multi-concept, 350+ units

"We are not using personalization, at its highest and best use. I expect us to skip a layer of the maturity rung of personalization and really leverage AI heavily very soon."

VP Marketing, multi-concept, 100+ units

“

"If everybody is a little bit different, you have to generate ridiculous amounts of creative elements."

CEO, Fast Casual, 100+ units

"True one-to-one personalization is going to really be dependent on how much you can build the right tech stack. It's less about buying the one right capability and more around connecting the right capabilities across different tools."

Sr. Director, Loyalty, 500+ unit QSR

“

"Our reality right now is the batch and blast, right? Where we're sending our perceived notions of a strong offer to each one of our guests... our hopes and dreams are to get to a place where we're actually being able to hit you based on your behavior."

VP Loyalty, 500+ unit QSR

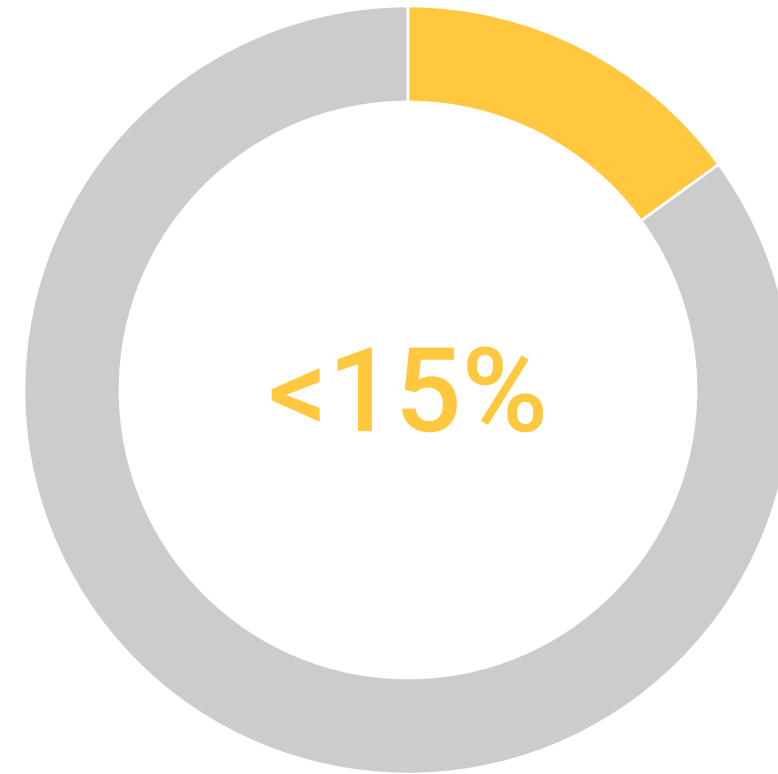
"Personalization is a myth. We say we personalize our email, but in reality, we don't. I think guests absolutely see through that."

VP Marketing, 100+ unit CDR

Product Propensity Messaging Represents A Massive Opportunity.

Ask:

Are you currently messaging based on specific menu item preferences rather than generic segmentation?



Executing automated product-propensity offers

Targeting based on basket composition or past item history is **the most requested feature**, yet execution is exceptionally rare.

Broad Macro Segmentation, Mostly

Ask:

Do you engage in micro-segmentation (n<10k) versus macro-Segmentation (broad segments like Active vs. Lapsed)?

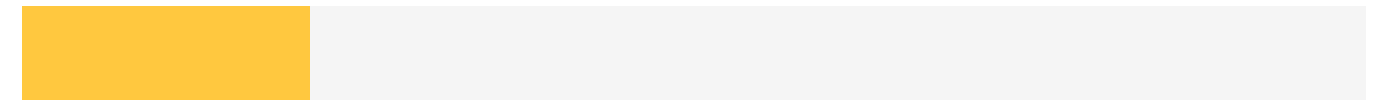
80%

Macro-Segmentation



20%

Micro-Segmentation

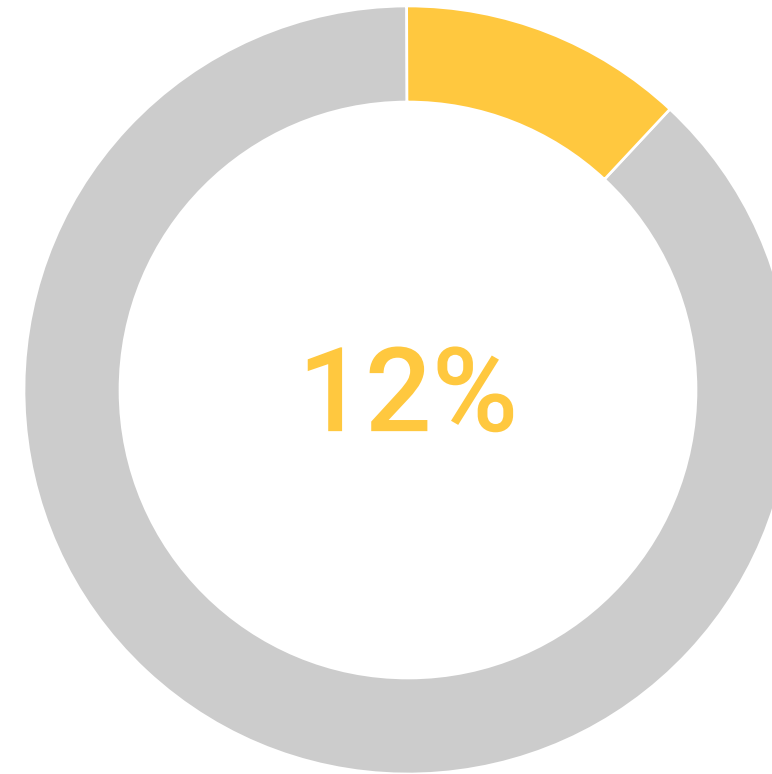


The vast majority are limited to high-level lifecycle segments rather than specific behaviors or item attributes.

Margin Protection/Price Sensitivity Is Vastly Underutilized.

Ask:

Do you actively personalize the value of the offer based on a guest's price sensitivity?



Personalized offer value

A very small fraction of sophisticated operators deliberately withhold discounts from guests willing to pay full price.

The Holy Grail: Product Propensity Segmentation

Critical Dimensions standing in the way



**Implementation
Gap is Real**



**Amplification or
cross-pollination?**



**No Solution For
Content Fatigue**



**Relevant
Messages
Beyond Ad Hoc
Campaigns**

Most respondents agree that the goal is to move away from All Signed Up and RFM to Product Propensity

Direct Quotes

Speak for themselves

“

"We're as guilty as anyone of just kind of shotgun blasting deals out there... we're going to try and do less shotgun blasts. Let's sell sushi to the people who love sushi, and tacos to people who love tacos."

Sr. Director, Loyalty, 500+ unit QSR

“

"Queso is our bestseller. If you never buy queso, then to you personalizing messaging means you don't ever see queso. I'm gonna sell you the things I know you like versus try to get you to buy something you've never ever bought in your life."

CMO, multi-concept, 350+ units

“

"Half my inbox emails are about 'Hey, we've got a new LTO!' - 'I'm never buying this LTO. Don't you know me?' Customization should be about who they are and what they are doing."

President, 500+ unit QSR

“

"If I know you and I know you hate chocolate, I'm not going to send you chocolate. I'm going to send you a cake because I know you love cake... I feel like that's the piece we somehow forget when we get into marketing."

VP Loyalty, 200+ unit CDR

In-Store Recognition Is Absent

Ask:

Do you have a system in place for In-
Restaurant recognition identifying
loyalty members to staff on arrival or
prior to payment?

0%

Real-time, in-service recognition is universally cited as the "nirvana" state, but scaled execution does not exist.

The Final Frontier: The "In-Store" Blind Spot

Digital personalization is maturing, but in-restaurant recognition is nonexistent.

Aspiration: "Airline status" recognition where staff knows a guest's name and preferences upon arrival.



Replicating the "Old School Diner" Hospitality

- Find a mechanism to return to the basics of hospitality
- Use digital data to re-create the intimacy of a neighborhood diner where staff know a regular's habits



Arming the Frontline with Actionable Data

- Push loyalty data upstream to the host stand or table-management system
- Shift the burden of recognition from the guest to the restaurant team members
- Give actionable instructions to cashiers and servers



The Pragmatic Friction of Guest Identification

- The vision for in-store recognition is unanimous
- The technology is not available

Direct Quotes

Speak for themselves

“

“Personalization has to happen at that local restaurant at the table level... any tools and resources we can provide our team members will be welcome with open arms”.

VP Marketing, 80+ unit CDR

“...it's about making the customer feel special in person, when they're at the counter and they're receiving their drink. In addition to the points and whatever they're earning on the digital program as well.”

Sr. Director, Loyalty, 100+ unit Beverage

“

“POS gives the cashier a ping - this is your regular! - so, they can thank them by name. Like that old school diner where the waitress knew your name and your order.”

VP Loyalty, QSR, 500+ units

“I would love to have a tag within Yelp that says: this is a loyalty member. When the host greets Olga when you walk in: 'Oh, Olga, thank you so much for coming to us for breakfast again! Love seeing you so often!”

VP Loyalty, CDR, 50+ units

“

“I want to get the data in the hands of our team members so that they can recognize our really great guests. Maybe they recognize whether or not you're a loyalty program member, they have two different colored table numbers – then the team member knows to look up guest preferences.”

Sr. Director, Loyalty, 1000+ unit CDR

“

“Could recognize them with NFC? Phone Mac Address? License plate in the driveway? This third car is a premium customer... and then you know... 'hello Mr. or Mrs. Jones, thank you for being a regular customer, we already added points to your account”

VP Marketing, multi-concept, 100+ units

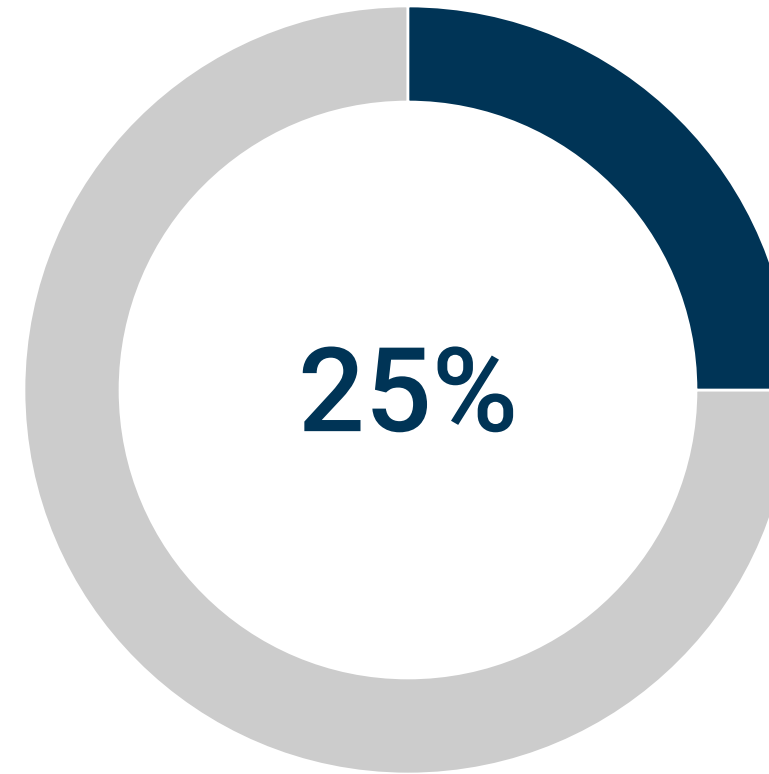
“In person guest identification: theoretically - absolutely 100%! Pragmatically - how that would actually be able to be applied in the restaurant – I have no good concept.”

CMO, 30+ unit CDR

Privacy Concerns Limit Personalization

Ask:

Are consumer privacy or the creepiness factor a limiting factor in your personalization strategy?



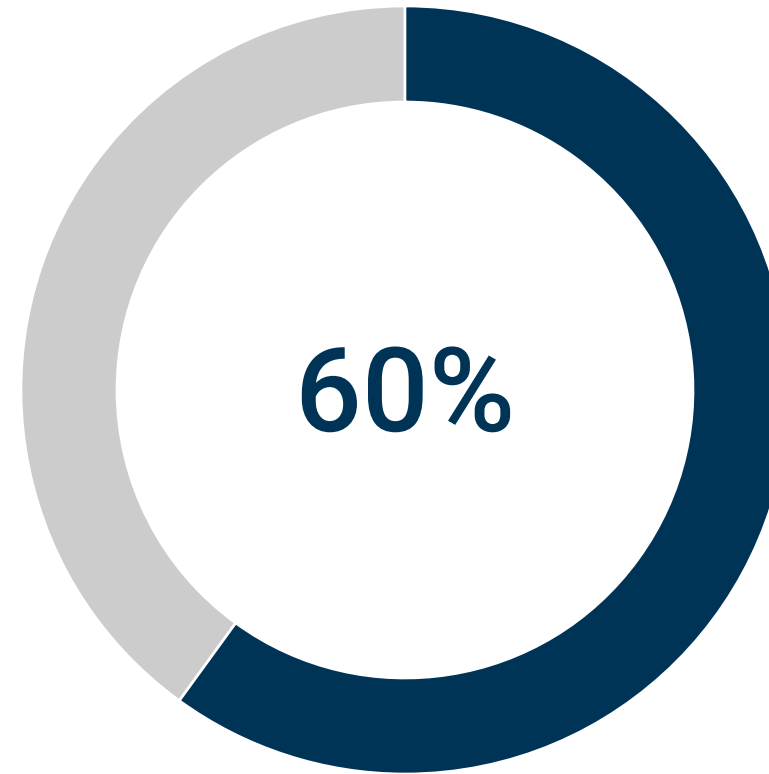
Privacy
Concerns

A quarter of operators intentionally restrict their data usage to avoid feeling weird or overly intrusive to the customer.

Intelligent Automation Is The Consensus Path Forward.

Ask:

Do you view AI as the necessary solution to achieve future personalization scalability?



**Yes!
AI is the
Answer**

The majority are banking on intelligent middle layers and offer engines to permanently bridge the human resource gap.



ROI Measurement



Brands that measure loyalty ROI and flex the strategy based on campaign results are also the most satisfied with their loyalty system performance

ROI Measurement: **The Highlights**



The Reality: Very Few Measure ROI



The Dream: In-house ROI Calculations



The Problem: Brands Don't Trust the Vendor's Math

The Measurement Maturity Matrix

	Measurement Focus	Control Methods	Baseline Tech
Emerging Brands	Top-Line Redemptions	Zero Holdout	Disconnected POS
Mid-Tier Operators	Short-Term Campaign Lift	Campaign-Specific Holdout	Basic Segmentation
Enterprise Leaders	Macro-Level Lifetime Value	Universal / Global Holdout	Tokenized Data Stitching

True holistic program incrementality is rarely measured outside of enterprise brands.

The ROI Measurement Maturity

Only a few enterprise brands capture Loyalty ROI

40%

No ROI Measurement

- Trusting “industry standards” to develop the program and the campaigns.
- Lack of campaign deployment and analytics resources to measure and experiment
- “Loyalty is Table Stakes” Point Of View

35%

Campaign Level ROI

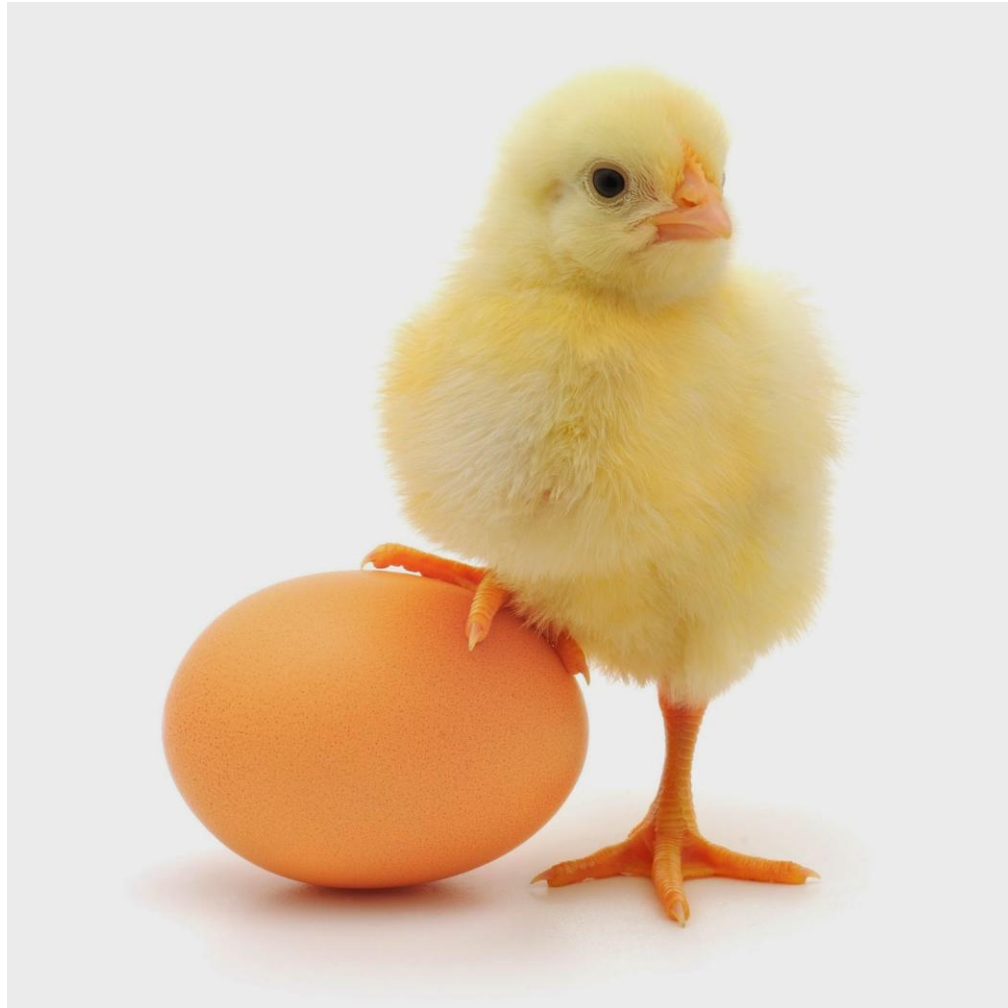
- Tracking campaign metrics like check average, discount rate, redemption rate.
- Measuring campaign incrementality for select campaigns with holdout groups.
- “We see enough lift on specific campaigns to know what works in general”

15%

Full ROI Capture

- Universal and campaign specific control groups to capture program incrementality
- Full PPNOG on every campaign
- Engagement measurement
- Program-level ROI – incremental profit minus platform fees.
- “Why guess? We dynamically measure each campaign and adjust on the fly if it’s not performing as expected”

Causation and Correlation Sentiment



“

“Well, how do we know that those people weren't already coming frequently and then they just signed up?”

CEO, 100+ unit QSR

“

“People who are rewards members are more likely to sign up because they already like your brand. And so they're already visiting more. No wonder they have higher frequency!”

Sr Director, Loyalty, 100+ unit Beverage

The Invisibility of Non-Loyalty Data

CDPs bring the promise to capture the behavior of non-loyalty and pre-loyalty guests.



20%

Tracked Loyalty Transactions

80%

Unknown Non-Loyalty Transactions

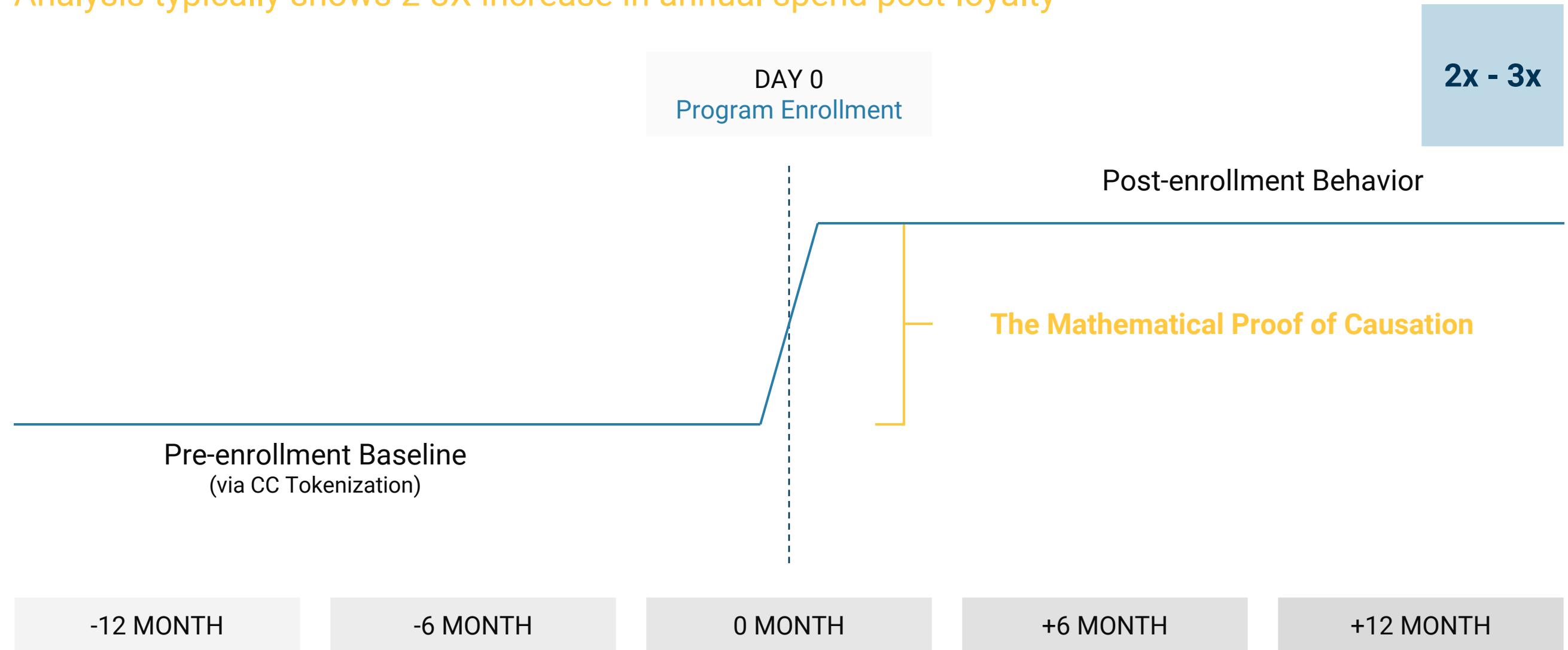
“

“Our new CEO is poking holes. How do we know it's causal not correlated? We can stitch data and create profiles to understand Olga prior to her joining the loyalty program and Olga after she joined.”

VP Loyalty, Multi-brand QSR, 1000+ units

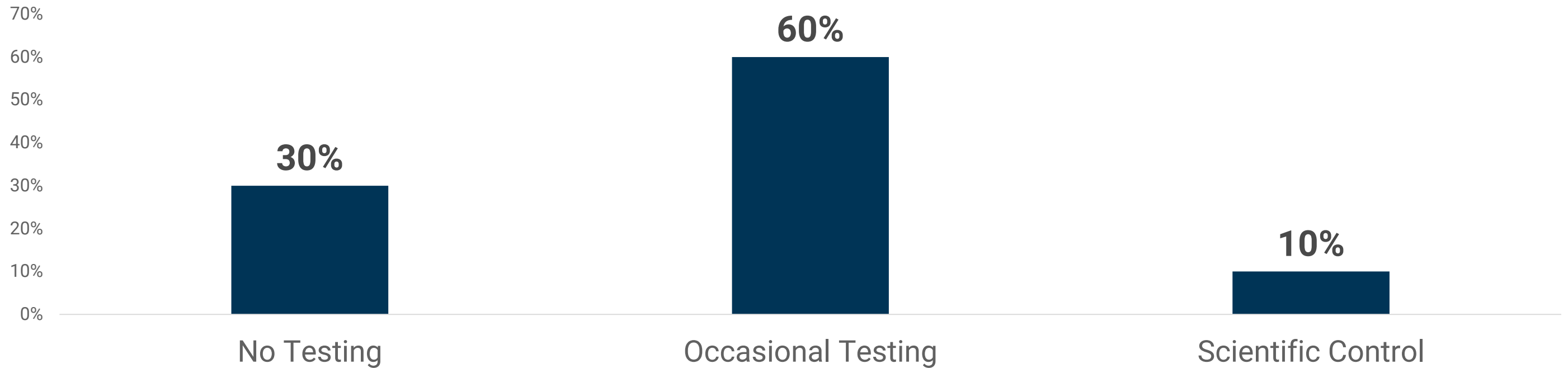
CDPs Prove True Behavior Change

Analysis typically shows 2-3X increase in annual spend post-loyalty



To Test Or Not to Test?

Adoption Rates for Scientific Control Groups



THE OPERATIONAL REALITY:

Smaller teams frequently skip control groups entirely, often due to internal pressure from operations to send offers to everyone for an immediate traffic spike.

THE MIDDLE GROUND:

Other brands rely on some campaign-specific holdouts to validate individual offers and filter out market noise.

THE GOLD STANDARD:

Large brands utilize "global holdouts" (a control group receiving zero marketing) to accurately measure true incremental revenue.

WANTED: Easy Access to Customer Lifetime Value



CLV as the Definitive
ROI Benchmark



Systemic and Technological
Barriers to Measurement



Guest Retention Data
Changes The Conversation



“The ultimate goal of loyalty is understanding the lifetime value of the guest, then shifting more guests to exhibit same behaviors”

Sr Dir, Loyalty, Enterprise CDR



“My loyalty customer is worth 3-5 times more annually than my non-loyalty customer... if I can get x% of my customer base converted to loyalty, that is this much incremental dollars”

CMO, QSR, 50+ units

“I have 88% non-member transactions. Member CLV is irrelevant if I don't know what the non-member CLV is”

VP Marketing, 80+ unit Fast Casual

“Vendor dashboards don't feature things like CLV prominently enough”

CMO, 30+ unit CDR

Getting Real About Costs

Advanced practitioners define costs expansively

“

"Even if [the vendor] did provide a number and it was positive, I would not believe it."

CMO, QSR, 50+ units

**Vendor
ROI**

(up to 14X)

Surface level ROI

—

Discounts
Food/Packaging COGS
Incremental Labor
Platform Fees
Creative Deployment Cost

Fully Loaded

=

**True
ROI**

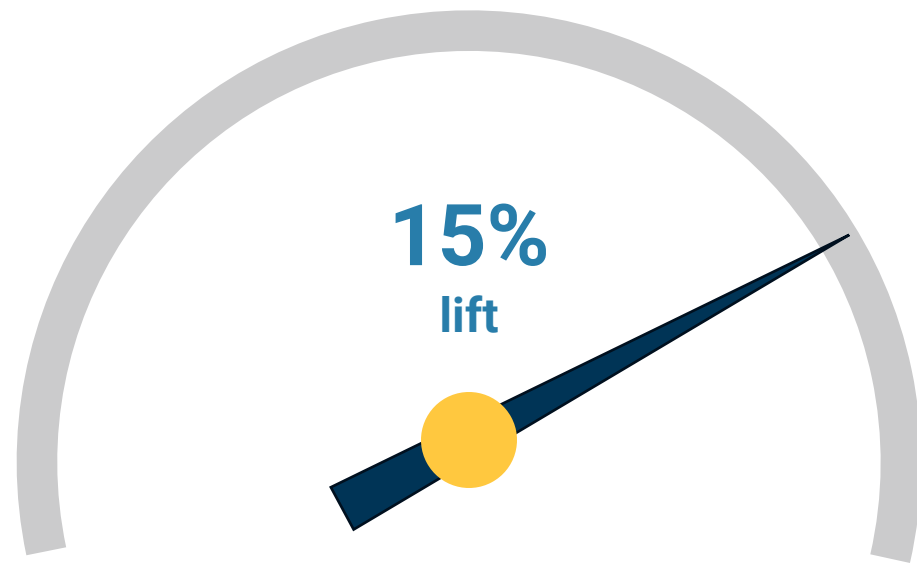
(1.5-3X)

Reality

The Vendor Trust Deficit

~ 25% of operators explicitly distrust vendor-provided ROI reporting

THE ILLUSION



Vendor Dashboard ROI

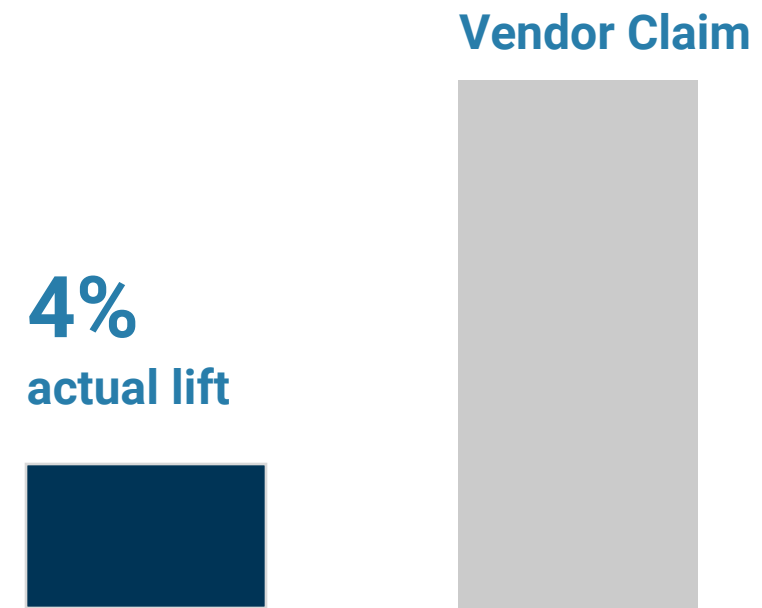
Flawed attribution models

No measurement of COGS

Promo profitability is ignored

Lack of CLV calculations

THE REALITY



Exported Raw Data Reality

Brands export raw data and build internal calculations

Direct Quotes

Speak for themselves

“

"We're quite scientific. We have a global hold out who don't get our communications, and a monthly hold out that is dynamic so we can check and double check our numbers. Our emails at an individual level any given month are driving hundreds of thousands of dollars of incremental revenue"

Sr Dir, Loyalty, Enterprise CDR

“

"We have such limited visibility in non-loyalty consumers. Hard to look at PPNOC (pre-post net of control) when you don't know what the Control is."

Loyalty Director, CDR, 150+ units

"I think the biggest threat to loyalty is CFOs. You've got a massive volume of discounts and promos is essentially seen as a cost... On your balance sheet you're carrying built-up points which are essentially a liability."

CMO, CDR, 70+ units

“

"I've not done deep ROI analysis on anything... I feel like loyalty is table stakes we just need to have. And so we picked *[platform redacted]*, it was the lowest cost option."

CMO, QSR, 50+ units

"A loyalty platform will tell you 14x ROI... that doesn't account for fees, discounts, . When you really get down to a true ROI after you take out all the labor, the food cost, the discounting, the platform fees... now you're looking at a 1x, 1.5x, maybe 2x. And that's okay."

CMO, 300+ unit QSR

“

"There is no ROI measurement that I have seen. The frequency increase was never proven. Maybe *[platform redacted]* provides an ROI... but even if they did and it was positive I would not believe it."

VP Marketing, 80+ unit Fast Casual

"Personalization is a myth. We say we personalize our email, but in reality, we don't. I think guests absolutely see through that."

VP Marketing, 100+ unit CDR



Technology



“I don’t want more software or more tools.

I want insights and answers.”

Technology: The Highlights



The Critical Technology Works Well



The Brands Are Tired Of Integrations



AI Middle Layer Is Everyone’s Hope

Loyalty Vendors Performance

The consensus is very clear

What do vendors get right

- ✓ Core Loyalty Mechanics
- ✓ Platform Stability
- ✓ Functional Basic Messaging across Push, Email, SMS
- ✓ Functional White-label apps
- ✓ Customer-facing UX quality

Where Vendors Fall Short

- ✗ Breadth Over Depth: Underbaked Features
- ✗ Back-End UI is Antiquated
- ✗ Analytics is rarely actionable
- ✗ Advanced Content Automation is Hard to Implement
- ✗ Rigid Customer Care
- ✗ “Nickel and Dime” Pricing Models
- ✗ Integrations Fails and Data Silos

Today: Integrations and Walled Gardens

Marketers are increasingly frustrated by closed, uncooperative ecosystems

Finger-pointing
and culture of deflection

- Vendors blame each other for service interruptions
- Operator has to connect the dots and prove vendors' responsibility

No single winning
solution for CRM

- Loyalty tools handle purely "loyalty attributed" transactions
- Loyalty tools can't perform like the full CRM

Restrictive write-access
limits platforms' usefulness

- Appending guest data is virtually impossible within loyalty tool.
- Acting on appended data requires more tools and integrations.
- Poor real-time sync between Loyalty, Kiosk, POS, Online Ordering,

Direct Quotes

Speak for themselves

“

“There is a lot of finger-pointing between the vendors. Something always goes down, and then it’s suddenly *my job* to prove whose fault it was before anyone does something about it.”

VP, Loyalty, Enterprise QSR

“

“Give me five well-thought-out features over ten half-baked ones. Focus on development depth, not just adding more to the roadmap.”

Loyalty Director, CDR, 150+ units

“The support we receive feels 'lazy' and repetitive. Instead of strategic insights, platforms provide the same recycled advice regardless of our unique needs or the measurable impact of those recommendations.”

CMO, 100+ unit CDR

“

“Our loyalty vendor built a system that you can't write your own data into. I understand their perspective, but guests have interactions outside the loyalty realm, and we can't include it. It's a solvable problem and it's hamstringing everybody else's entire tech stack.”

Sr. Dir., 500+ unit QSR

“

“Platforms are great at adding surface-level capabilities, but they stumble on actual execution. Implementing an 'out-of-the-box' feature shouldn't feel like starting a custom development project from scratch.”

Head of Loyalty, 300+ unit QSR

I spent 10 years working for big systems integrators. Never ever saw that work effectively. You can't take completely different differently architected software and bolt it together.

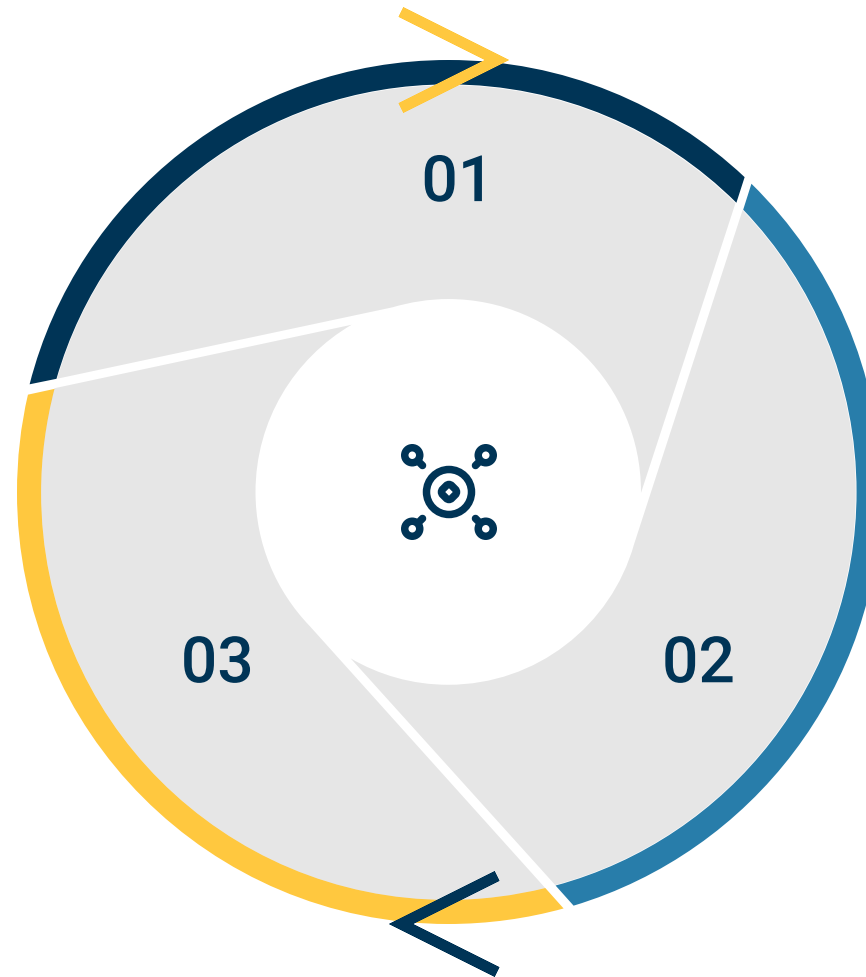
CMO, 50+ unit CDR

The Consensus Future Vision

Intentional, not reluctant integrations.

Sophisticated Marketing Automation Tool

- Dispatching the Automated Strategy
- Building Creative Assets and Offers
- Reporting Engagement Data back into the CDP.



CDP or Data Lake

- Aggregate POS, Online Ordering, Loyalty, Engagement and Guest Feedback data into a single source of truth.

The Intelligent Middle Layer

- Under-developed part of the stack today.
- Loyalty accounting and some journeys are automated today.
- Automated analysis and segmentation is the dream

The Data Confidence Divide

Brand confidence in acting on loyalty data depends mostly on human resources managing the data.



Enterprise Brands

- CDPs and Data Lakes
- Empowered Data Analysts
- Informed Marketers

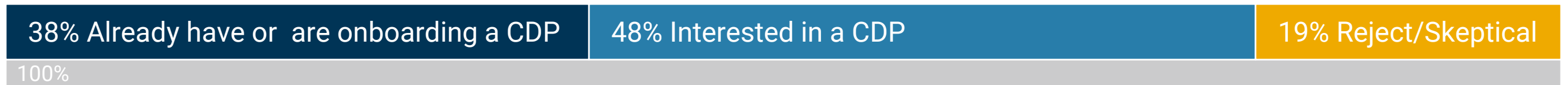


Lean Teams

- Manual Processes
- “Handcuffed by the technology”
- Struggle to extract insights

CDP Adoption and Attitudes

81% of respondents have a CDP, are implementing one or want to acquire one.



The Adopters

- **Status:** Successfully implemented or actively onboarding a CDP to synthesize guest data.
- **Core Motivation:** Solving the blind spot of in-store and anonymous guests. Tracking behaviors and resolving identities outside of traditional loyalty apps.
- **Vendor Footprint:** One dominant preferred partner is emerging among mid-tier restaurants. Enterprise brands often bypass third parties for proprietary builds or partial CDPs.

The Aspirers

- **Status:** Heavily desire a CDP but currently operate without one.
- **Core Motivation:** Desperate for an intelligent middle layer to transition from basic discounts to 1:1 personalization. Need to benchmark loyalty vs. non-loyalty members.
- **Vendor Footprint:** Currently a functional gap. CDPs are viewed as entirely financially prohibitive for mid-market brands with limited technology budgets.

The Skeptics

- **Status:** Actively lack a CDP and question the overall value of acquiring one.
- **Core Motivation:** Avoiding heavy technical lifts and complex tech busts. Prioritizing basic, functional tools due to lack of bandwidth and internal analytical resources.
- **Vendor Footprint:** Actively averse to heavy CDPs (citing past failures). Migrating toward lower-cost sophisticated but generic BI tools like Microsoft Power BI or Looker.

Why Adopt The CDP?

Top 5 reasons to say YES!

Anonymous Guest "Blind Spot" via Credit Card Tokenization	Accurate Baselines for ROI and Incrementality	360-Degree View	Preventing Unnecessary Discounting	Advanced Segmentation and Predictive Analytics
<ul style="list-style-type: none"> • The "other 80%" of transactions are missing. • Identity resolution for anonymous guests is key to accurate targeting. 	<ul style="list-style-type: none"> • Pre-loyalty v. Post-loyalty CLV • Flexible Control groups • Accurate incrementality of campaigns captured. 	<ul style="list-style-type: none"> • Operational data siloed across POS systems, online ordering (OLO), 3PD, reservation systems, and survey tools. • Marketing data siloed across email/SMS/PN engagement, social media and ad engagement. 	<ul style="list-style-type: none"> • Pinpointing truly lapsed guests • Avoiding margin-eroding "win-back" discounts to active guests 	<ul style="list-style-type: none"> • Churn risk • Product propensity • Predictive CLV

“ Without a CDP, I can't compare members and non-members. There is no baseline”

Sr Director, Loyalty, 200+ unit QSR

Why Skip The CDP?

The CDP Barrier: Cost and Complexity

Ongoing Technology Costs

- Expensive to implement
- Expensive to maintain

No Analysts on Staff

- It is easier to query, but someone still has to do it.

Engineering/Integration Complexity

- Not a simple plug-and-play software solution.
- Can uncover data gaps resulting in rabbit holes.

Bad Prior Experience

- Failed CDP Implementations
- Limited Functionality post-implementation

Just not that helpful.

- 360 view only offers a marginal difference in outcomes v. loyalty only view.
- Data aggregation and BI tools re enough.



Without a qualified human to operate it, CDP quickly becomes an underutilized data storage locker.

VP Marketing, multi-concept, 100+ units

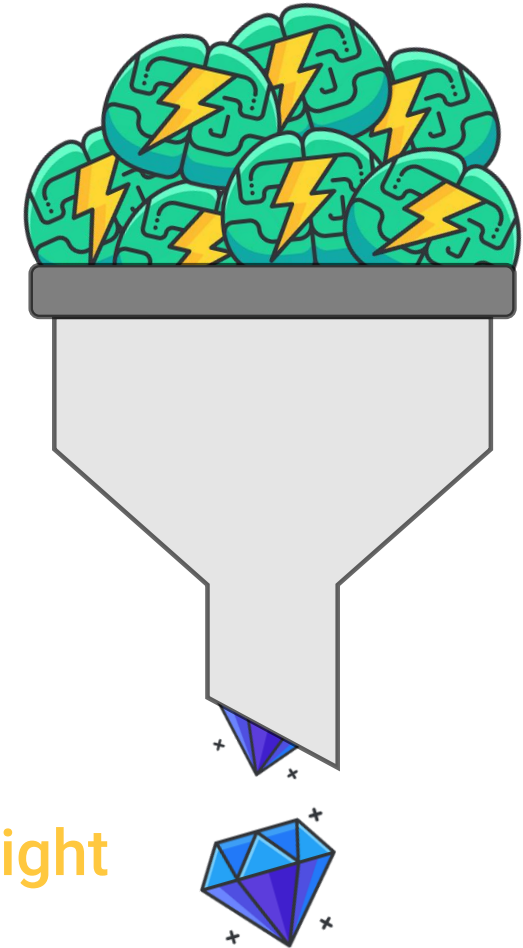
Still: Oceans of Data, Drops of Insight

“

We do not need more dashboards to manually monitor.

We do not need raw data exports requiring hours of pivot tables.

We need systems that translate raw data into consumable strategy instantly.



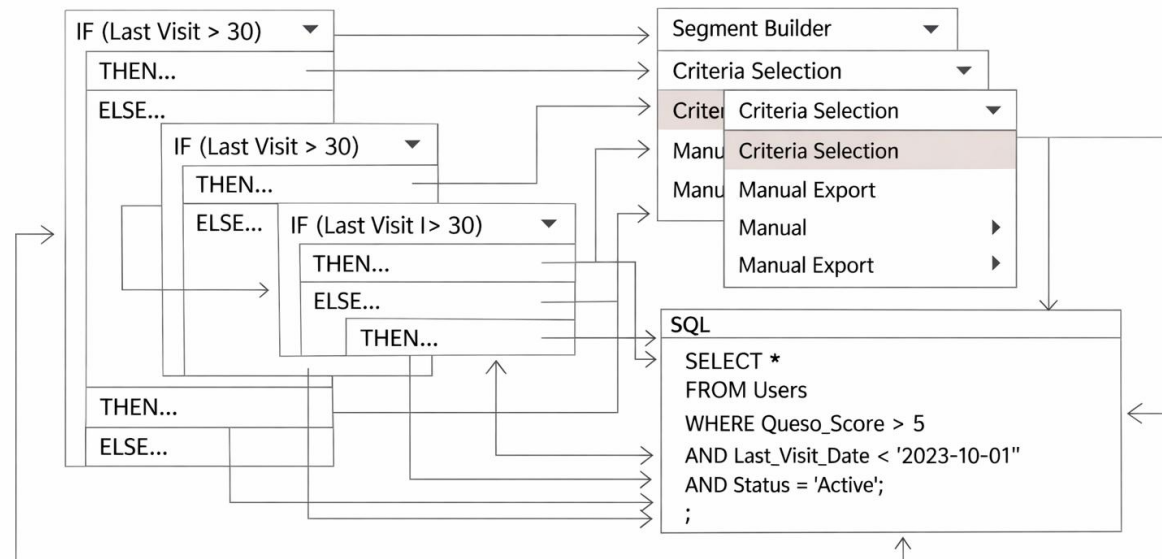
Actionable Insight

**The Industry Lacks The Mechanism
To Bridge The Gap Between Data Warehousing And Marketing Execution**

Optimism Around AI's Ability to Streamline 1st Party Marketing

Before and After

THE OLD WAY



From Manual to Automated

Replacing labor-intensive audience building with AI-driven propensity modeling.

Natural Language Querying

Bypassing click-heavy architectures to build complex segments instantly via text prompts.

THE AI REVOLUTION

“Find guests who love Queso and haven't visited in 30 days. Send them a BOGO offer.”



Proactive Suggestions

Software that actively suggests campaign adjustments based on real-time operational shifts.

Nevertheless... Not Ready To Go Live!

51 out of 53 respondents were not ready to launch automated AI campaigns

Hallucinations

- AI models generated highly plausible but entirely fictional analyses
- Fabricated customer profiles and transaction histories
- Fictional conversations
- Confident outputs with total lack of context.

No Contextual and Macro Awareness

- Confident outputs with total lack of context.
- Inability to account for political or weather events.

Accountability and Control

- Human marketers bear the risks in the end.
- With AI campaigns at scale, can humans keep up?

Sea of Sameness

- Same models for everyone level the playing field... again.
- Loss of competitive advantage and differentiation.

Creative Generation Problems

- AI struggles to produce creative reliably at scale.
- AI-generated imagery often misaligns with actual menu items.

Flawed Data Infrastructure

- Fragmented data sets lead to poor analytics
- AI models are not questioning the data quality.

Direct Quotes

Speak for themselves

AI Advocates



"It would be incredible to just tell the platform what you need - like targeting all the 'queso lovers' - and seeing the campaign materialize instantly without the usual technical friction."

CMO, QSR, 80+ units

AI Skeptics



"There is no accountability for AI yet. If it fails, they turn off the platform; if I fail, I lose my job. I can't fully trust a system where my name is on the line but I have no visibility into the process."

Head of loyalty, Enterprise QSR

"I'm not looking for a tool to dictate my next steps or action items. I want it to provide the underlying data insights effortlessly, removing the burden of manual analysis so I can arrive at my own strategic conclusions."

VP Marketing, 100+ unit CDR

Apps v. Frictionless Signup and Identification?

All respondent agreed that both approaches are needed.

The Super User

Profile: High-frequency loyalists.

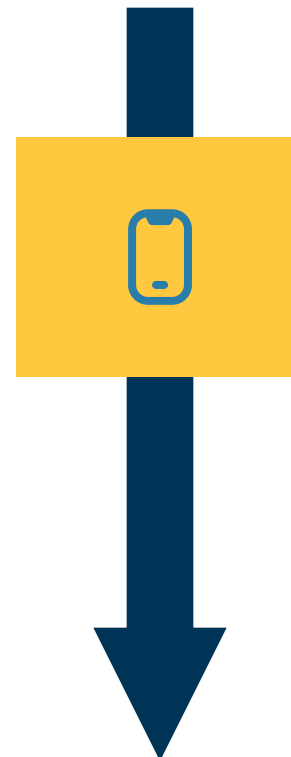
Mindset:

Willing to dedicate premium phone real estate.

Strategy:

Native Mobile App

Deliverables: Superior online ordering & robust account management.



The Fringe Guest

Profile: Occasional visitors.




Mindset:

Suffering from extreme app fatigue; actively refuses downloads.



Strategy:

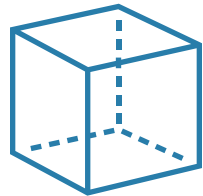
Frictionless Identification

-  Wallet Smart Passes
-  CC Tokenization
-  POS Phone Entry

Best-in-Class v. Single System

All respondent agreed that both approaches are needed.

Single System



Monolithic Add-ons
(e.g., POS-driven CRM)

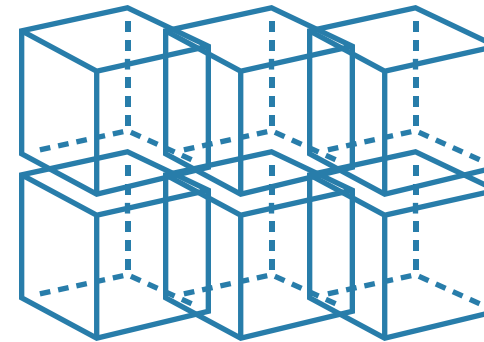
Pros:

- Single login
- Unified reporting
- Out-of-the-box sync

Cons:

- Shallow feature sets
- Rigid data protectionism
- Repeats legacy architectural errors

Best-in-Class



Loyalty + CDP
+ Email marketing Platform
+ SMS marketing

Pros:

- Top-tier capabilities across channels
- Deep data access
- Highly flexible

Cons:

- High integration friction
- Requires higher technical acumen
- Higher combined cost

Build v. Buy: 0% of respondents were in favor of "Build".



Evolution

The Evolution of Loyalty and the "Sea of Sameness"

Problems

- Sea of Sameness
- Points Fatigue
- App Download Fatigue

Solutions

- Extreme Convenience
- App-less data capture
- *Maybe* New Loyalty Structures



The Experiential Rewards: No Consensus



Positive / Optimistic Patterns:

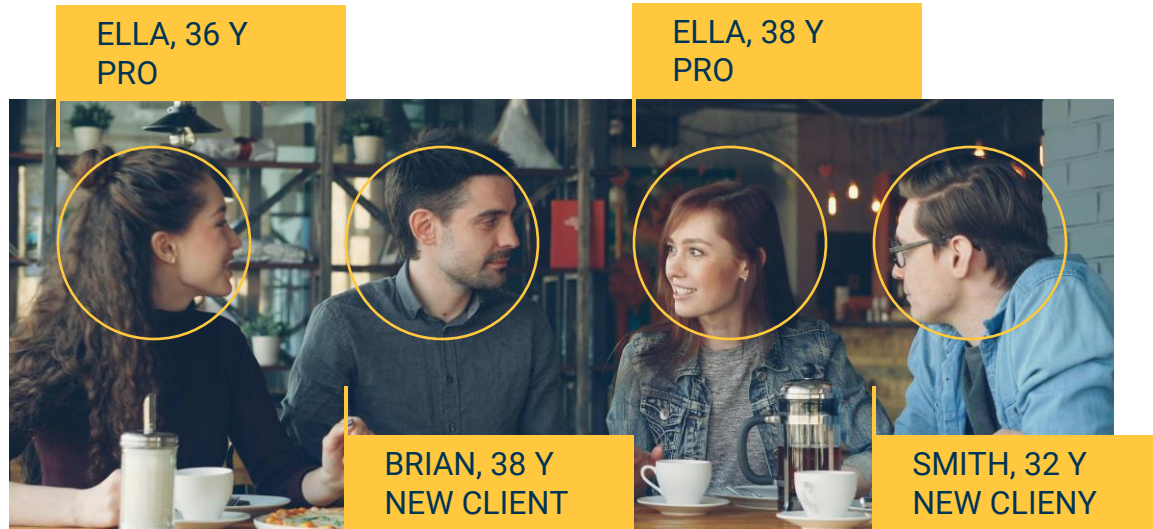
- Digital-First Approach
- Localized Perks
- Hyper-Fan Recognition



Negative / Skeptical Patterns:

- Operational Disruption
- Hard to Scale
- Gimmicky
- Discounts win hands down
- Industry Mismatch

The Dream: Seamless In-Store Identification



Digital Nirvana

Identifying guests
pre-payment

0%
Execution

Store Reality

Hardware, training,
awkward interactions

Direct Quotes

“

“One of my primary goals this year is to get data directly into the hands of our team members. We need to empower them to recognize and reward our most loyal guests, as well as every [brand name redacted] member, the moment they interact with us.”

Head of Loyalty, Enterprise CDR

“The next big innovation will be geofencing for loyalty. Just like how Target knows I’ve arrived for a pickup, a restaurant should know when a loyalty member walks in so we can immediately associate that guest with their table.”

CMO, 150+ unit CDR

“

“Real personalization happens at the table level, within the four walls of the local restaurant. Our job is to provide managers and team members with the tools and resources that arm them with the capability to deliver that experience.”

VP Marketing, 100+ unit CDR

“

“We want to bring that 'old-school diner' feel to the modern industry - where the staff knows your name and your order. The dream is for the POS to ping the cashier and say, 'This is a regular,' allowing them to offer a personalized, face-to-face thank you.”

Sr Director of Loyalty, Enterprise QSR

“We could use AI and near-field communication to recognize customers before they even enter the building. Imagine the system flagging a car in the drive-thru lane and alerting the team: 'The third car in line is a premium customer.’”

CEO, Enterprise QSR

“

“There needs to be a functional, operational component to personalization. Imagine a tag within a tool like Yelp that identifies a loyalty member so the host can greet them by name the moment they walk in. That is how you truly personalize a guest's experience.”

VP Marketing, 50+ unit CDR

Gamification: Low Excitement



Positive / Optimistic Patterns:

- Gen Z and Gen Alpha Appeal
- Gamified Transactions
- Innovative Touchpoints opportunity



Negative / Skeptical Patterns:

- Budget and ROI Skepticism
- Reskinned Vendor Games
- Game Relevance is key

Partnerships: Universally Positive Sentiment



Positive Patterns

Low-Cost, Low-Friction Value Creation:

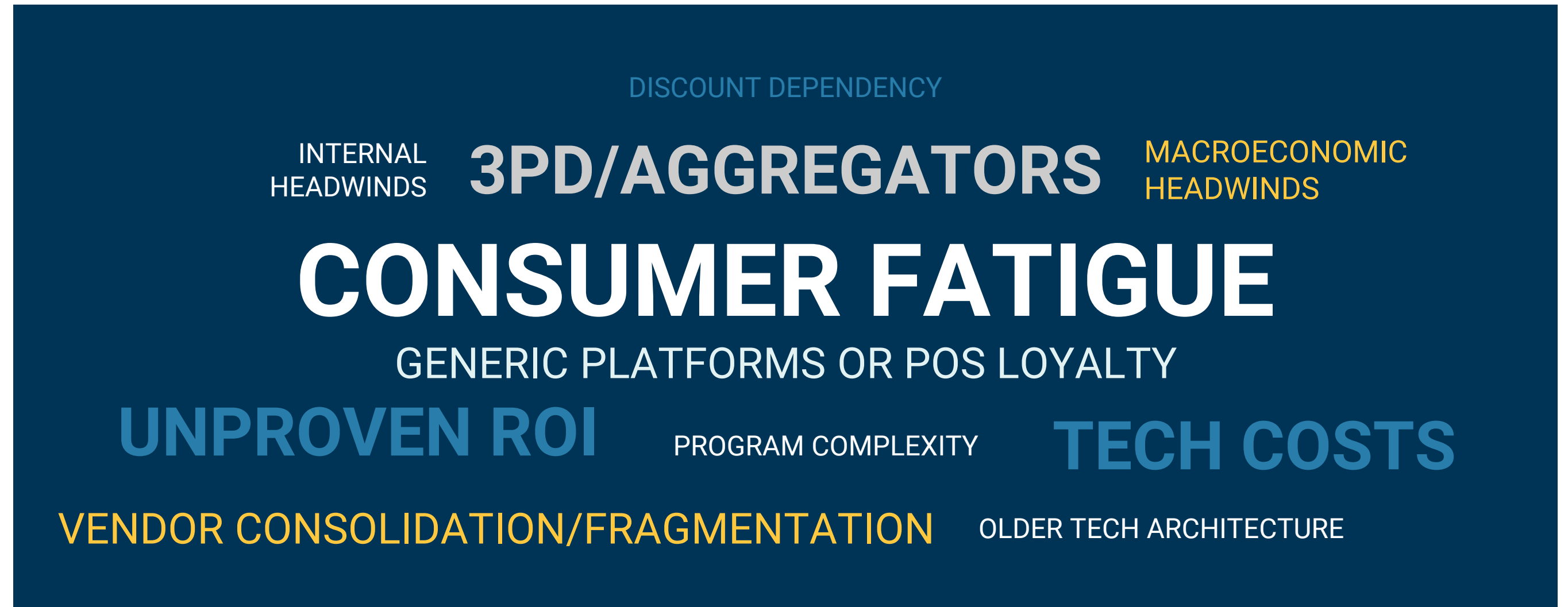
- Multi-year cross brand partnerships
- Cross-Industry Partnerships
- Enterprise-Level Perks



Negative Patterns

- Complex, Unique Set Ups

Existential Threats to the Loyalty Ecosystem



The Human Element: Tech Fatigue and Resource Exhaustion

Too many tools

Too many integrations

Too many dashboards

Antiquated UI

Unreasonable Switching Costs

Vendor's Support Quality

Direct Quotes

Speak for themselves

“

"The restaurant industry is reaching a breaking point with tool fatigue. We don't need more software; we need the platforms we already have to be significantly more intuitive and easier to use."

CMO, Fast Casual, 70+ units

"Layering multiple vendors is not only expensive but creates a data nightmare. We're forced to build secondary dashboards just to make sense of the primary ones; honestly, we're getting lost in the data."

CTO, multi-brand QSR, 200+ units

“

"I'm looking for actionable intelligence, not just another dashboard to dig through. I need the technology to identify the problems, surface the solutions, and help us proactively fix issues before they escalate."

VP Marketing, Beverage QSR, 100+ units

“

"For the first time, our strategic vision is being handcuffed by our technology. It's a frustrating position to be in when your ideas outpace your platform's ability to execute them."

VP Loyalty, Enterprise QSR

"It is incredibly difficult to stay productive when you're balancing a rapidly changing market with technology that frequently fails."

VP marketing, Fast Casual, 50+ units

“

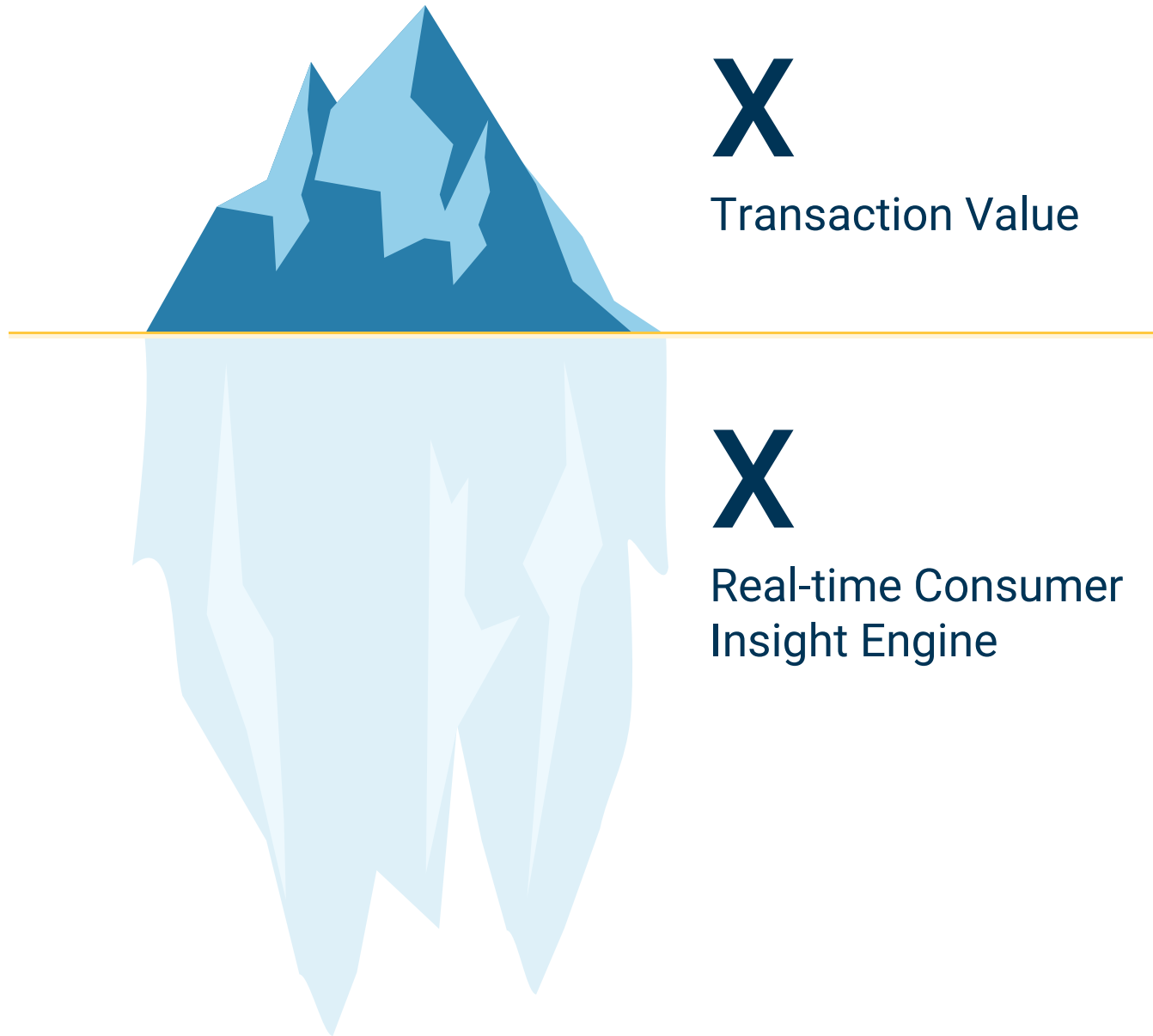
"As a CMO, I was spending 10 to 15 hours a week manually pulling and analyzing data just to find a strategic path forward. I was essentially burning myself out on the data instead of leading the strategy."

CMO, multi-brand CDR, 150+ units

"There is a major disconnect when a vendor's strategy team doesn't understand their own technical stack. They provide lists of 'great recommendations' that are actually impossible to execute, rendering their support useless."

Sr Director of Loyalty, Fast Casual, 130+ units

Hidden Value: Loyalty Databases as Research Engines





Strategic Implications

Strategic Takeaways for Marketing and Loyalty Leadership

Measure Your Own ROI.

- Do not trust vendor dashboards.
- Vendor math often ignores food costs, discounts, and extra labor.
- Instead, calculate ROI internally.
- Use control groups to test if your campaigns actually work.
- Focus on long-term customer value rather than quick top-line redemptions.

Automate Product Offers.

- Manual personalization is too hard for small teams.
- Most brands still just send mass emails.
- Use AI and automation to skip the manual work.
- Let your platform automatically send targeted offers based on the specific items a customer actually buys.

Identify In-Store Guests.

- Loyalty apps miss up to 80% of your daily sales.
- Customers are also tired of downloading new apps.
- Fix this by using invisible tracking, like credit card tokenization or digital wallet passes.
- This helps capture data so your staff can eventually greet regulars by name.

Build a Central Data Hub.

- Teams are burned out by having too many tools that do not connect.
- Stop relying on isolated vendor systems.
- Invest in a CDP & an analyst or build your own reporting.



About Us: Everything **Your Restaurant Needs** to Improve Guest Loyalty

Strategic Loyalty Consulting
for Restaurant Brands

Restaurant chains that we've helped grow



Problems Our Clients Ask Us To Solve



Program Success

Is our loyalty **program working?**



ROI Calculation

How do we determine **loyalty program ROI?**



Tech Solutions

Do we have **the right tools** in our CRM tech stack?



Spending Gap

Why are loyalty guests **spending less** than non-members?



Structure Fit

Is our program **structure right** for the brand and the customer?



User Retention

Are we effectively bringing **back lapsed users?**



Member Insights

What are the **key motivators and pain points** for our loyalty program members?



CLV

How does our loyalty program **impact customer lifetime value?**

Testimonials

Speak for themselves

changed the trajectory of our loyalty program with regular double-digit year over year comp growth

Andy Rebhun
 CMO, El Pollo Loco

brought a level of **sophistication and data driven insights** to our loyalty efforts

Eric Coolbaugh
 VP Marketing, Freebirds Burrito

strongly recommend RLS if you are looking to switch, boost, or start a reward program for your business

Alberto Bassal
 CMO, Carrot Express

enabled us to launch our program **without adding additional internal resources** to our project

Leslie Smith
 VP Marketing, Smokey Mo's BBQ

two weeks to develop a program: they **delivered the entire thing**, end to end, within our timeframe

Leon Davoyan
 CTO, Dave's Hot Chicken

hands down **one of the (if not 'the') most buttoned-up restaurant loyalty-marketing experts in the country**

Dan Bejmuk
 CEO, Dreambox

having someone **understand the ins and outs of your platform and help drive testing and insights is extremely important**

Jennifer Donley
 Director of Loyalty, Tropical Smoothie Cafe

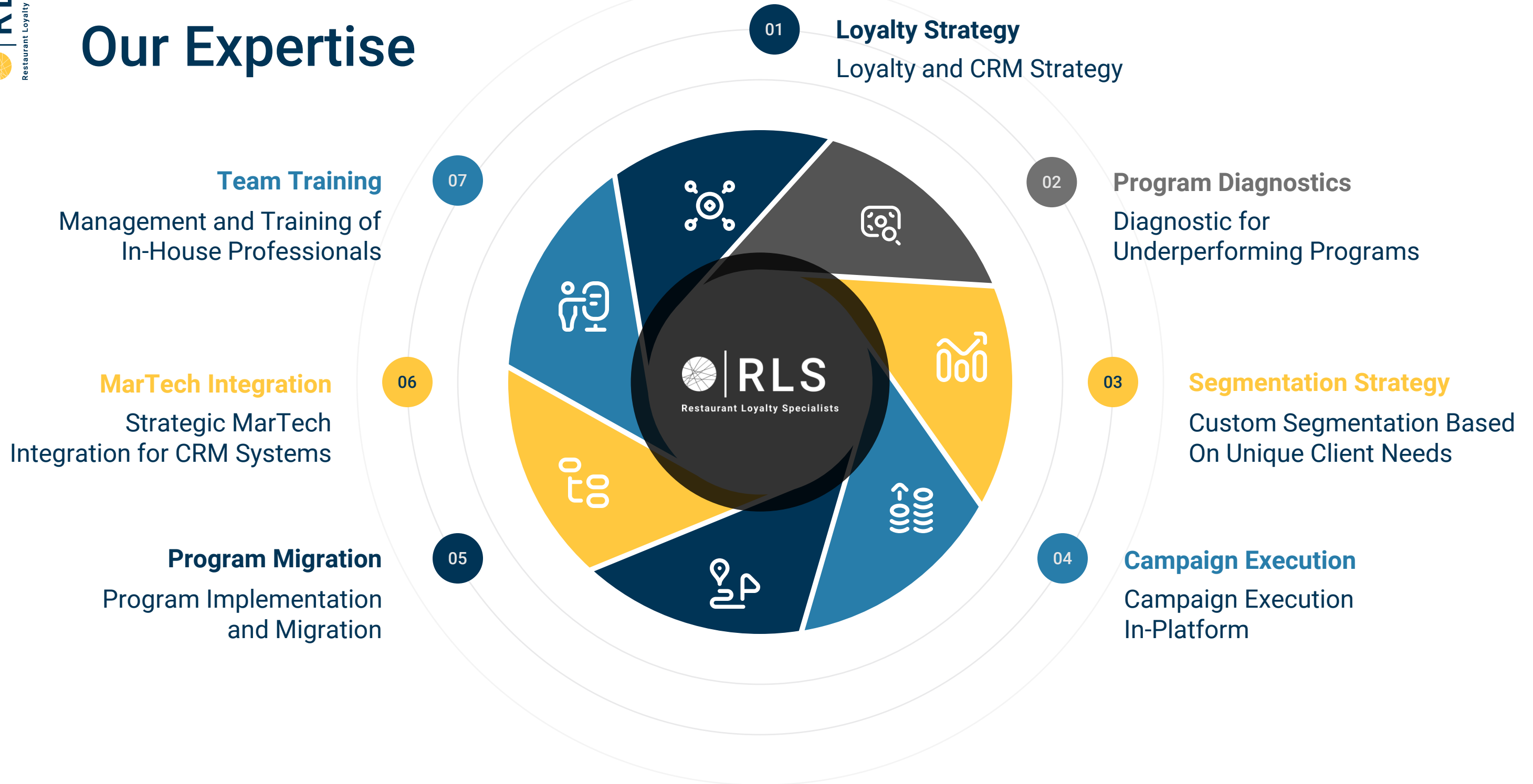
went above and beyond

Will Hanrahan
 Head of Loyalty, Fazoli's

brings science into marketing

Nasia Taouxi Themistocleous
 Head of Marketing, T.G.I. Fridays, Cyprus

Our Expertise



About

Olga Berkovich Lopategui Founder, RLS

After 15 years in various marketing roles at Pizza Hut, KFC, and TGI Fridays, Olga Lopategui founded Restaurant Loyalty Specialists, a boutique loyalty consulting firm, serving restaurant chains ranging from 20 to over 1,000 locations.

In the early days of RLS, Olga personally provided strategy and in-platform execution for her clients. She has a deep understanding of the CRM platform's technology capabilities and limitations, and their impact on the ability to deliver results. As a result, all strategy consultants working on the RLS projects have hands-on in-platform expertise.

Since 2019, under Olga's leadership, the RLS team has helped over 30 restaurant chains grow their loyalty and CRM programs, strengthen the in-house teams, and turn customer data into actionable insights.

Olga was born in Moscow, Russia, and has lived and worked in Europe, Asia, and the US in the course of her career. She is fluent in English, Russian and Spanish, holds a Harvard MBA and a Georgetown LLM, and lives in Austin, Texas with her husband and two young children.

olga@restaurantloyaltyspecialists.com

Call or Text: 940 230 6793



Olga Lopategui

Founder and Principal Consultant