

20 Brands Countless Occasions – 1 Loyalty Program





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Global Martech Strategic
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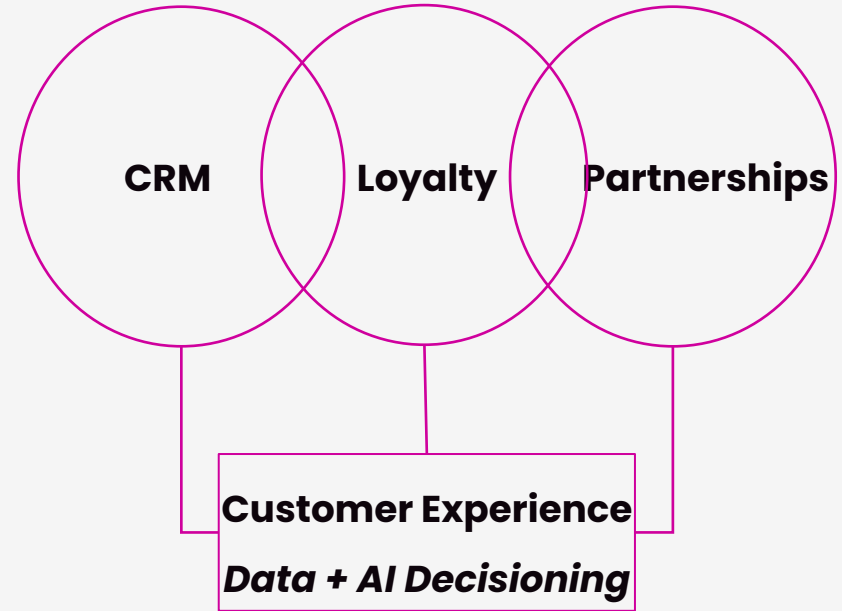


Paul Foster
Head of Customer Growth
and Loyalty
Greene King

We're *the*
customer
intelligence-
driven
engagement
company.



Where bond starts.



Five *trends* emerging from program operators we talk to.

Meet the Moment

1

Desire to shift loyalty toward a connected customer growth engine, not just a marketing add-on or discount.

WHAT WE'VE HEARD

- Program growth has plateaued
- Loyalty teams are pressured to 'do more'
- Optimization and investment decisions are made in silos

WHAT WE KNOW

72%

of loyalty marketers believe there's a "sea of sameness" across loyalty programs

79%

say there's an internal interest to update, enhance or redo their loyalty offering

71%

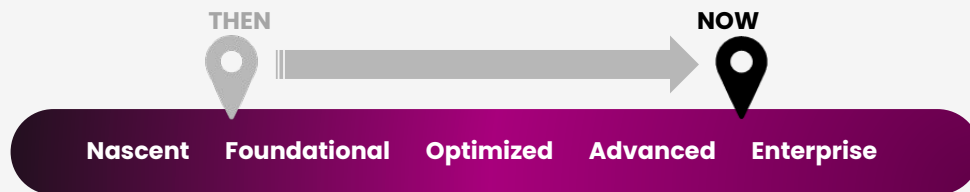
feel that this is caused by poor integration with the overall customer experience

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Meet the Moment

2

Loyalty has matured. There is a shift in focus from program foundations to advanced outcomes.



- Program / construct Design
- Business Case
- Technical Optimization
- Financial Measurement & Planning
- B2B/B2C Harmonization
- Operating Model & Enablement
- Advanced CRM
- Brand Amplification
- Experience Design
- CLO & Other Partnerships
- Shared Data Models
- Data Monetization
- Enterprise Objectives

Five *trends* emerging from program operators we talk to.

Meet the Moment

3

Some program leaders are seeking to better balance art and logic, and reinvigorate creative, emotional, brand stories within programs.

Mechanics.
Logistics.
Optimization.
Modeling.

yes... and...

Emotion.
Innovation.
Creativity.
Surprise.

Five *trends* emerging from program operators we talk to.

Meet the Moment

4

Program leaders have begun to recognize new priorities emerging from the K-Shaped economy

The Effect

Despite segmentation, traditional loyalty models under-plan for breadth of customer needs.

Winning Requires...

Shift in program constructs, messages and offers.

Five *trends* emerging from program operators we talk to.

Meet the Moment

5

Energy and pace applied to infusing AI practices into program operations more efficiently



Complementary Agents



Optimizing Voice of Customer



Marketing Ops Tools



Expanded Data Value & Predictive models

**Tech is
transforming
— personalisation.**

And AI has raised the customer bar

For the first time, it is practically possible to deliver genuinely individual, brand-coherent experiences at scale – not just optimised for performance, but capable of building brand value over time.

The aspiration

CRM has always aimed for one-to-one relevance. The best programmes got close - but doing it at scale required enormous manual effort.

What has changed?

AI makes it practical, for the first time, to decide the most relevant action for each individual and deliver it consistently at scale.

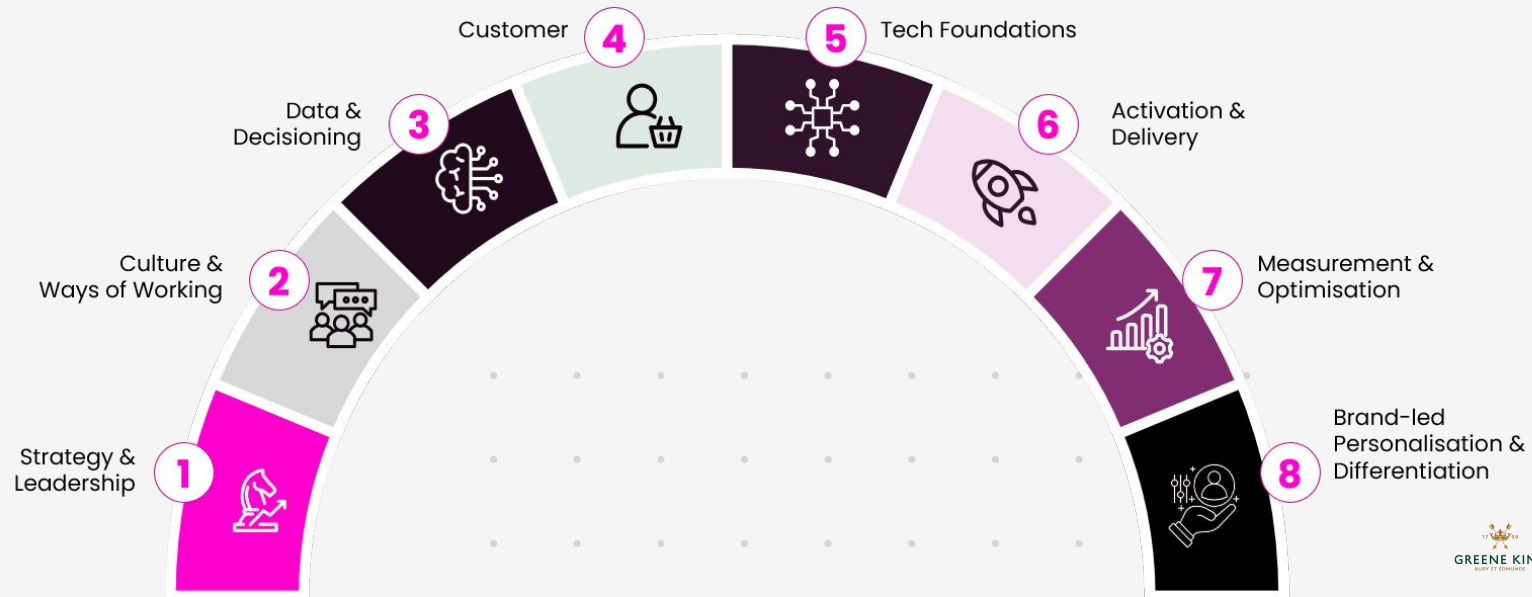
Why now?

The bar for personalisation has fundamentally shifted. The leaders who define what good looks like are still being decided.

— But AI $\neq$
Personalisation.

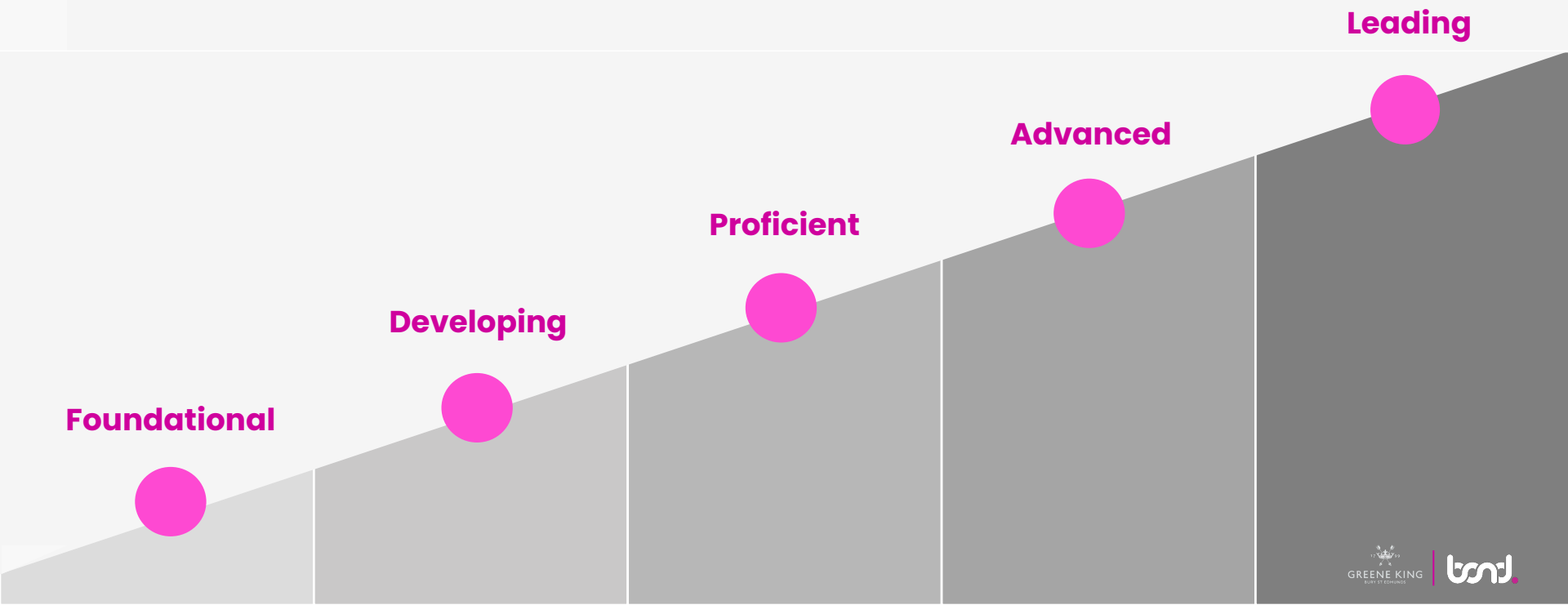
Personalisation maturity, measured differently.

The **Personalisation Maturity Framework** (PMF) is Bond's strategic diagnostic that helps organisations understand how effectively they are delivering personalised customer experiences, and how to improve.



No one has reached leading yet.

Maturity runs from Foundational to Leading across five levels. AI has only just made genuine scaled personalisation practical — so the top tier is wide open, waiting to be claimed.



The industry is at level 2.

The average personalisation maturity score is 2.2 out of 5

Average score: 2.2

“Some structured activity exists - segments, rules, basic reporting. But it is fragmented, hard to scale, and not yet generating reliable value.”



Foundational

28
%

Developing

67%

Proficient

5%

Leading clients
average here

Advanced

<1%

Leading

0%



One client's journey from theory to momentum

A woman with blonde hair tied back, wearing a dark blue polka-dot shirt, stands and smiles while interacting with a group of people seated at a table in a dimly lit pub. The seated individuals are mostly seen from the back or side, creating a sense of being part of the conversation. The background shows a stone wall with a framed picture and a window looking out onto a street.

**The original one-to-one
industry. Overdue a digital
upgrade.**

Where Greene King were

SUMMER 2025



Foundational

Developing

Proficient

Advanced

Leading



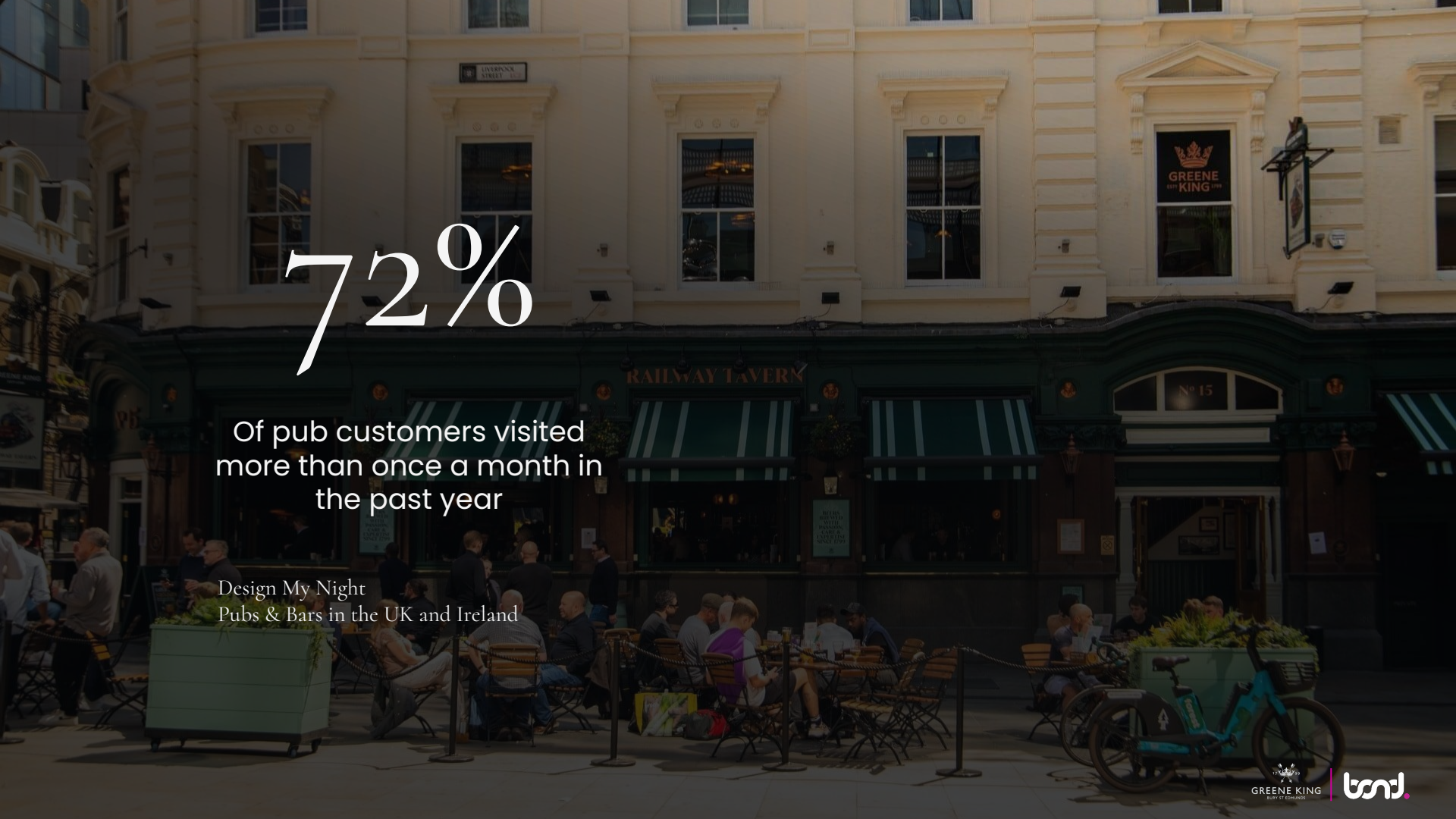


Digital ambition

**Make every customer feel
like a regular.**

Increase contactable audience

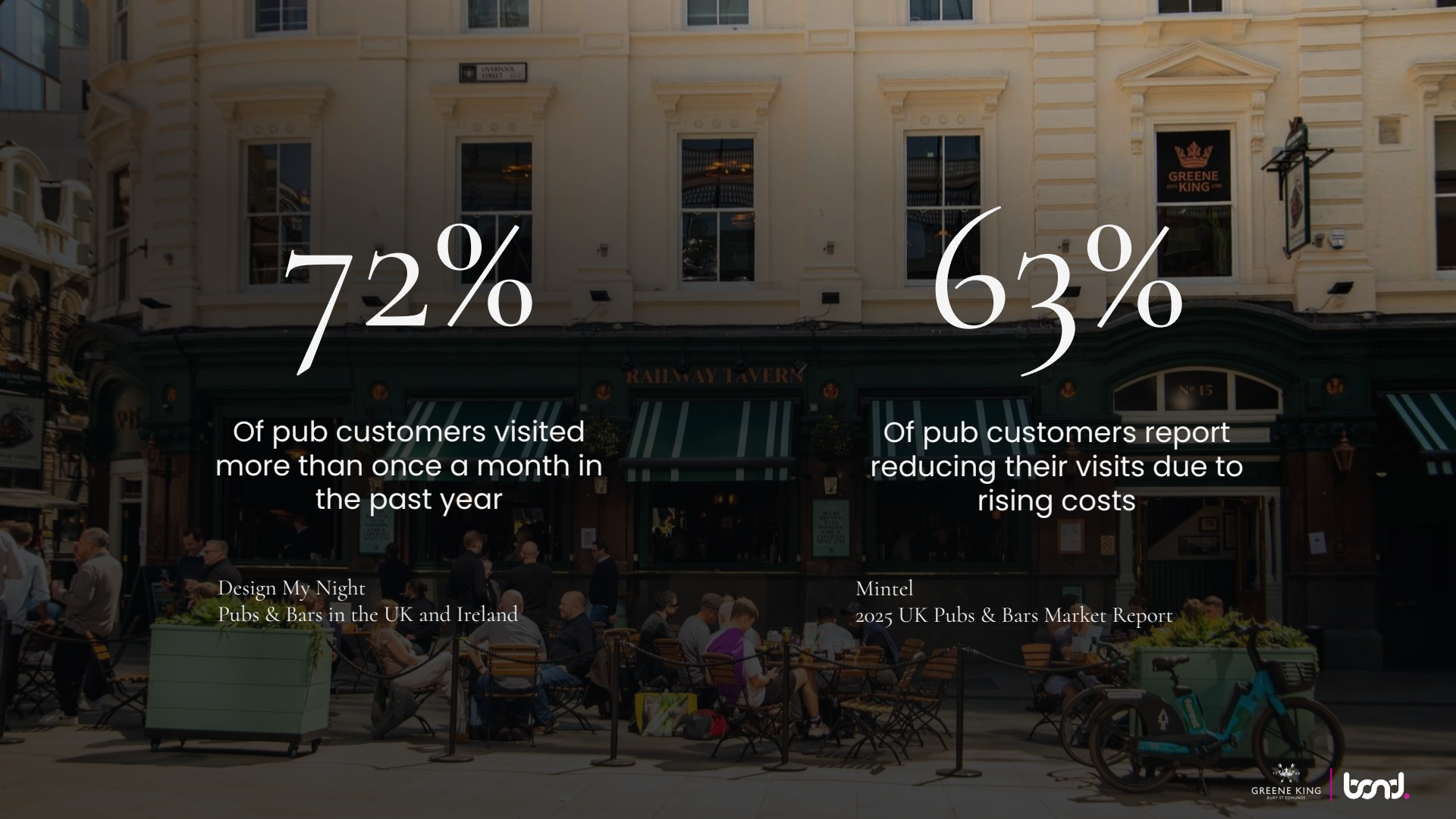
Grow customer lifetime value



72%

Of pub customers visited
more than once a month in
the past year

Design My Night
Pubs & Bars in the UK and Ireland



72%

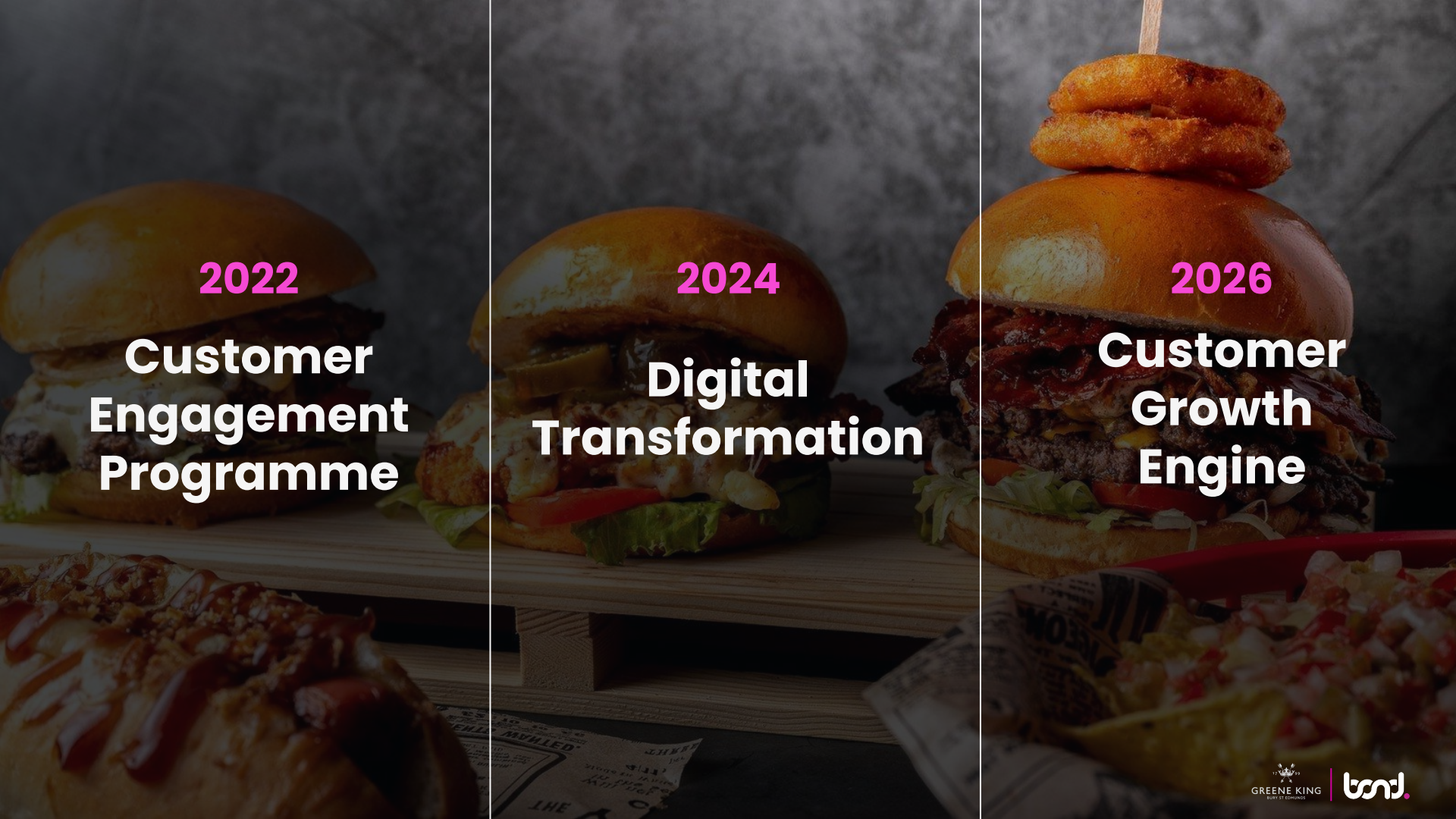
Of pub customers visited
more than once a month in
the past year

Design My Night
Pubs & Bars in the UK and Ireland

63%

Of pub customers report
reducing their visits due to
rising costs

Mintel
2025 UK Pubs & Bars Market Report



2022

**Customer
Engagement
Programme**

2024

**Digital
Transformation**

2026

**Customer
Growth
Engine**



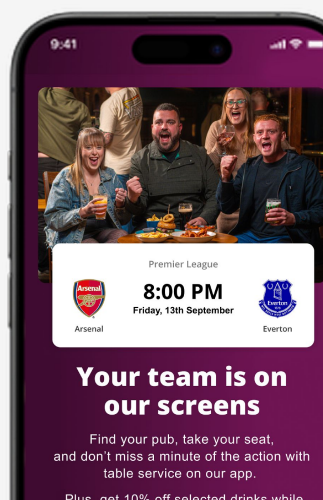
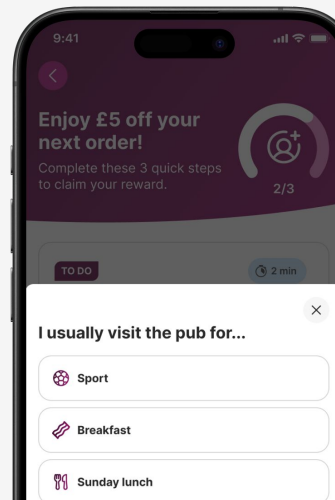
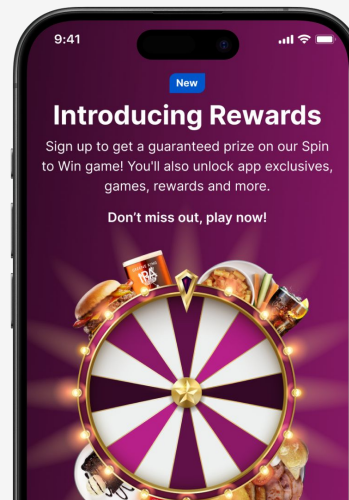
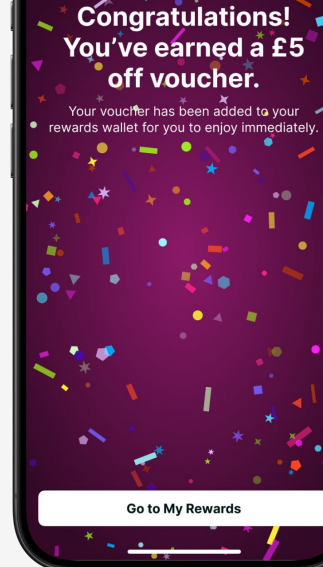
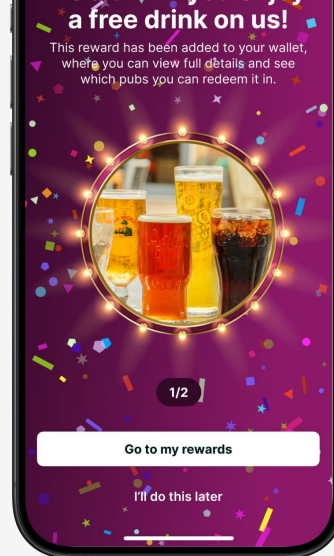
GREENE KING
BURY ST EDMUNDS

2,700 pubs.
20 brands.
Every occasion.



CUSTOMER

The pubs
everyone
visits. The
portfolio
nobody saw.



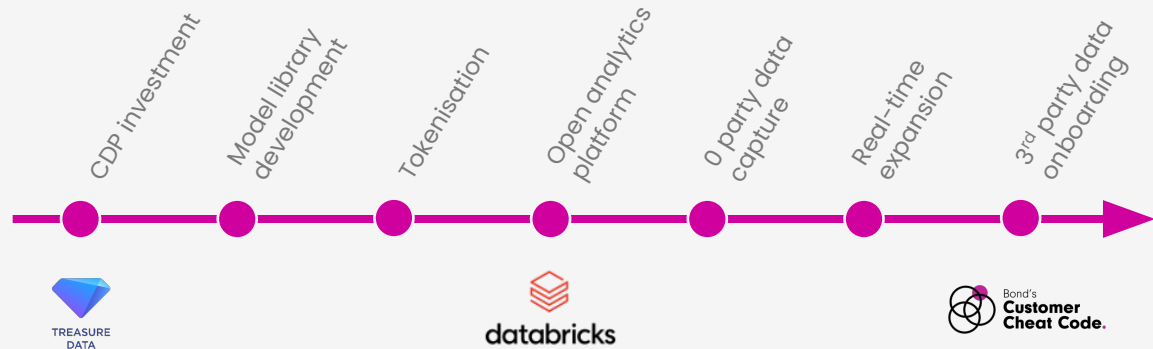
DATA & DECISIONING

No single breakthrough. Just relentless progress.



DATA & DECISIONING

**No single
breakthrough.
Just relentless
progress.**



ACTIVATION & DELIVERY

**The best
message is
sometimes no
message.**

£30

Cost per unsubscribe

From below average...

SUMMER 2025



Foundational

Developing

Proficient

Advanced

Leading

From below average... to above average.

SPRING 2026



GREENE KING
BURY ST EDMUNDS



Developing

Foundational

Proficient

Advanced

Leading

From below average... to above average – and not slowing down.

SPRING 2027



Foundational

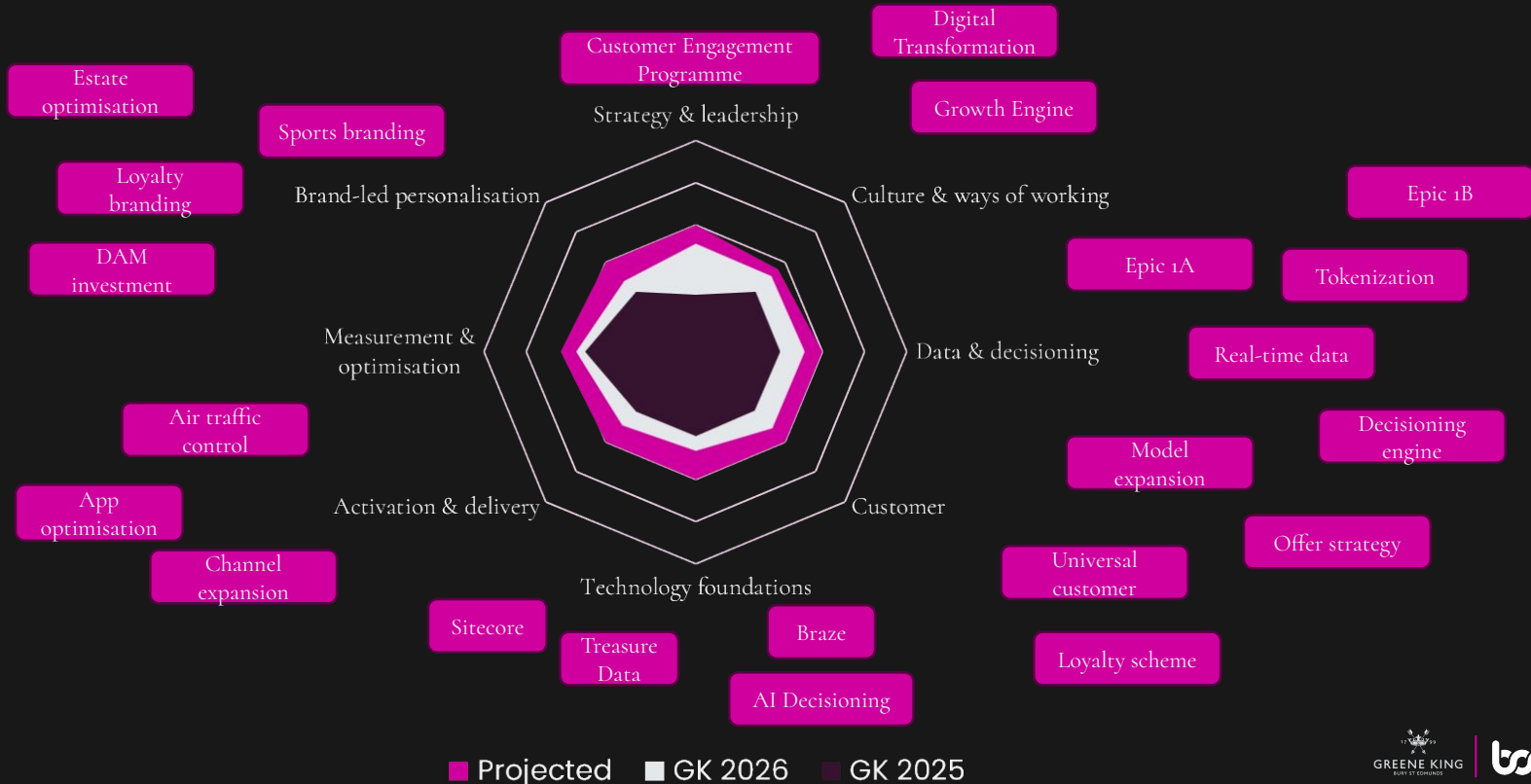
Developing

Proficient

Advanced

Leading

Most brands pick one pillar. Greene King moved on all eight.



What does this unlock?

2m

Loyalty
sign-ups in
12 months

+53%

In customer
visits*

+41%

In customer
spend*

*vs non-loyalty customers

Key takeaways:

- 1 No-one has it nailed yet – the hospitality industry is still adapting to pace of change. Identify focus areas and progress them as a priority.
- 2 Loyalty has never had a broader definition, nor been more vital to brands success.
- 3 Loyalty can solve complex issues beyond driving the next transaction – how could it deepen customers relationship with what your brand offers?

Come and talk to us about:

- 1 Desire to shift loyalty toward a connected customer growth engine, not just a marketing add-on or discount
- 2 Loyalty has matured. There is a shift in focus from program foundations to advanced outcomes
- 3 Program leaders are seeking to better balance art and logic, and reinvigorate creative, emotional, brand stories within programs
- 4 Program leaders have begun to recognize new priorities emerging from the K-Shaped economy
- 5 Energy and pace applied to infusing AI practices into program operations more efficiently