



# Building Value Through Loyalty Strategies in Mobility

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## INTRODUCTION

Scope

Key findings

Key drivers of change

## LOYALTY IN MOBILITY: WHY IS IT IMPORTANT?

Customer retention: Loyalty helps brands build lifetime value from customers

Customer service: Brands can use loyalty to better appease their customer base

Competitive advantage: Loyalty can be used to build a competitive edge over competitors

Data analytics: Loyalty programmes can help gather valuable insights on client preferences

Hyper- personalisation : Loyalty programmes can curate personalised products and services

## LOYALTY THEMES IN AUTOMOTIVE

Six factors in the automotive sector are disrupting brand loyalty

Building deeper connections with customers is the key to unlocking loyalty

Case study: Hyundai's Mocean subscription caters to growing demand for flexible ownership

Case study: Tata introduces the "Evolve" loyalty programme to augment experiential needs

Case study: KIA launches an EV charging rewards scheme to build value for EV clients

Shift to software-defined vehicles will unlock new opportunities for automotive loyalty

Case study: GM joins Connected Vehicle Systems Alliance to future-proof business

New technologies will shape and underpin the future automotive loyalty landscape

Case study: BMW to use NFTs in a blockchain-powered loyalty programme

Case study: Peugeot to add ChatGPT voice assistants

Loyalty provisions in emerging markets will be central to automotive growth strategies

## LOYALTY THEMES IN SHARED MOBILITY

Three themes shaping consumer loyalty in shared mobility

Subscriptions: Transforming customers into a valuable community with lasting connections

Case study: Bolt introduces Bolt Plus to deepen customer use of shared services

Sustainability: Sustainability-led initiatives push brands closer to their eco-customer base

Case study: Lyft launches "Green" mode to allow users to hail EVs or hybrids

Single-app experiences: Super-apps keep brands in touch with the digital lives of consumers

Case study: Careem – the "everything app" catering to a diverse range of consumers

Gamification: Game-like elements boost customer engagement and satisfaction

Case study: Forest uses gamification tactics to build engagement and loyalty

Coalition ecosystems can offer whitespace loyalty prospects as mobility becomes interwoven

## LOYALTY THEMES IN CAR RENTAL

Car rental players still betting on transactional and very traditional loyalty structures

Car rental consumer loyalty participation shows mediocre results

Subscriptions: Tourism revival boosts performance but subscriptions still vital

Middle East and Africa with the highest growth by 2040: opportunities for loyalty schemes

Kyte : Disruptor in the car rental segment in the US

Partnership-based: Airlines and car rental loyalty schemes, established but not "showstoppers"

Status match for elite members: enough to elevate the appeal of car rental loyalty schemes?

Case study: Saudia and Lumi partnership: expanding the loyalty proposition

Car rental loyalty ecosystems

Localiza with the highest engagement rate for its mobile app among leading car rental players

Case study: Times Club in Japan shakes up status quo

## STRATEGIES FOR SUCCESS IN THE MOBILITY LOYALTY SPACE

Barriers to loyalty in the mobility industry need to be addressed

More work is needed to embrace the next-generation loyalty proposition

Tactics for success across the three categories

How to win

## SUMMARY

Key summary

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