

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

by Emily Collins

July 15, 2019

Why Read This Report

In our 22-criterion evaluation of loyalty service providers, we identified the 14 most significant ones — Aimia, Ansira, Bond Brand Loyalty, Brierley+Partners, Capgemini, Epsilon, ICF Next, Inte Q, Iris Concise, Kobie, The Lacek Group, Lenati, Merkle/HelloWorld, and T3 — and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketing professionals select the right one for their needs.

Key Takeaways

Kobie, Bond Brand Loyalty, Epsilon, Lenati, And The Lacek Group Lead The Pack

Forrester's research uncovered a market in which Kobie, Bond Brand Loyalty, Epsilon, Lenati, and The Lacek Group are Leaders; Merkle/HelloWorld, ICF Next, T3, Aimia, Brierley+Partners, Capgemini, and Ansira are Strong Performers; and Inte Q and Iris Concise are Contenders.

Depth And Breadth Of Strategic Services Is A Key Differentiator

As organizations increasingly prioritize retention and loyalty, providers that can help them evolve their tactical programs into enterprise strategies will lead the pack.

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Table Of Contents

- 2 **Service Providers Position Loyalty As An Outcome, Not A Program**
- 3 **Evaluation Summary**
- 7 **Vendor Offerings**
- 8 **Vendor Profiles**
 - Leaders
 - Strong Performers
 - Contenders
- 13 **Evaluation Overview**
 - Vendor Inclusion Criteria
- 15 **Supplemental Material**

Related Research Documents

- [Be A Loyalty Company, Not A Company With A Loyalty Program](#)
- [The Forrester Wave™: Loyalty Technology Platforms, Q2 2019](#)
- [Now Tech: Loyalty Marketing, Q4 2018](#)



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The 14 Providers That Matter Most And How They Stack Up

Service Providers Position Loyalty As An Outcome, Not A Program

Nearly every US online adult belongs to a loyalty program, yet only 44% agree that programs make them feel more loyal to a brand.¹ As brands embrace and increase their investments in loyalty — 62% of the companies we surveyed for this evaluation plan to increase their spending on loyalty by at least 5% in the next 12 months — consumer apathy isn't good enough.² Marketers need strategic guidance to make the most of their programs and, more importantly, to contextualize the role of the program in a larger strategy for earning, recognizing, and maintaining customer loyalty regardless of whether that customer is a loyalty program member. In response, loyalty services providers are shifting their efforts from designing and managing loyalty programs to delivering loyalty programs as a means to an end for insight and experience delivery. B2C marketers looking to optimize and evolve their loyalty approach should look for providers that will:

- › **Help them break through the program-centric mindset that dominates today.** Nearly all loyalty service providers can design and execute a customer-centric loyalty program that balances traditional purchase-based rewards with experiential and engagement-focused benefits. And their ability to support and execute programs is why clients choose to work with them in the first place.³ Their No. 2 selection factor is thought leadership; the best loyalty service providers help clients set an enterprise strategy that reimagines loyalty as the outcome of all the experiences a customer has with a brand and reframes programs as the source of customer insight needed to fuel those experiences.
- › **Deliver quantitative and qualitative customer understanding.** Customer journeys are increasingly complex as consumers interact with brands at all stages of the life cycle across an ever-expanding array of devices, touchpoints, and channels. It's not a surprise then that the biggest challenges facing loyalty marketers is making sense of all those interactions to deliver a consistent experience for loyal customers. Marketers need a provider that can help them wade through the murky waters of customer behavior, needs, motivations, and emotional states to better understand what drives customer loyalty.
- › **Bridge the gap between building a vision and actually executing it.** Many of the references we talked to outsource their loyalty initiatives because they lack subject-matter expertise and want help staying ahead of trends. But they also need help rationalizing emerging trends and blue-sky visions in the context of their current business realities. Service providers that innovate outside of client engagements, embrace Agile processes across their offering, offer experience design services that include prototyping and testing, and follow formal change management frameworks are better equipped to make visionary thinking a reality.

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our [Now Tech: Loyalty Marketing, Q4 2018](#) and [The Forrester Wave™: Loyalty Technology Platforms, Q2 2019](#).

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

The Forrester Wave™: Loyalty Service Providers, Q3 2019

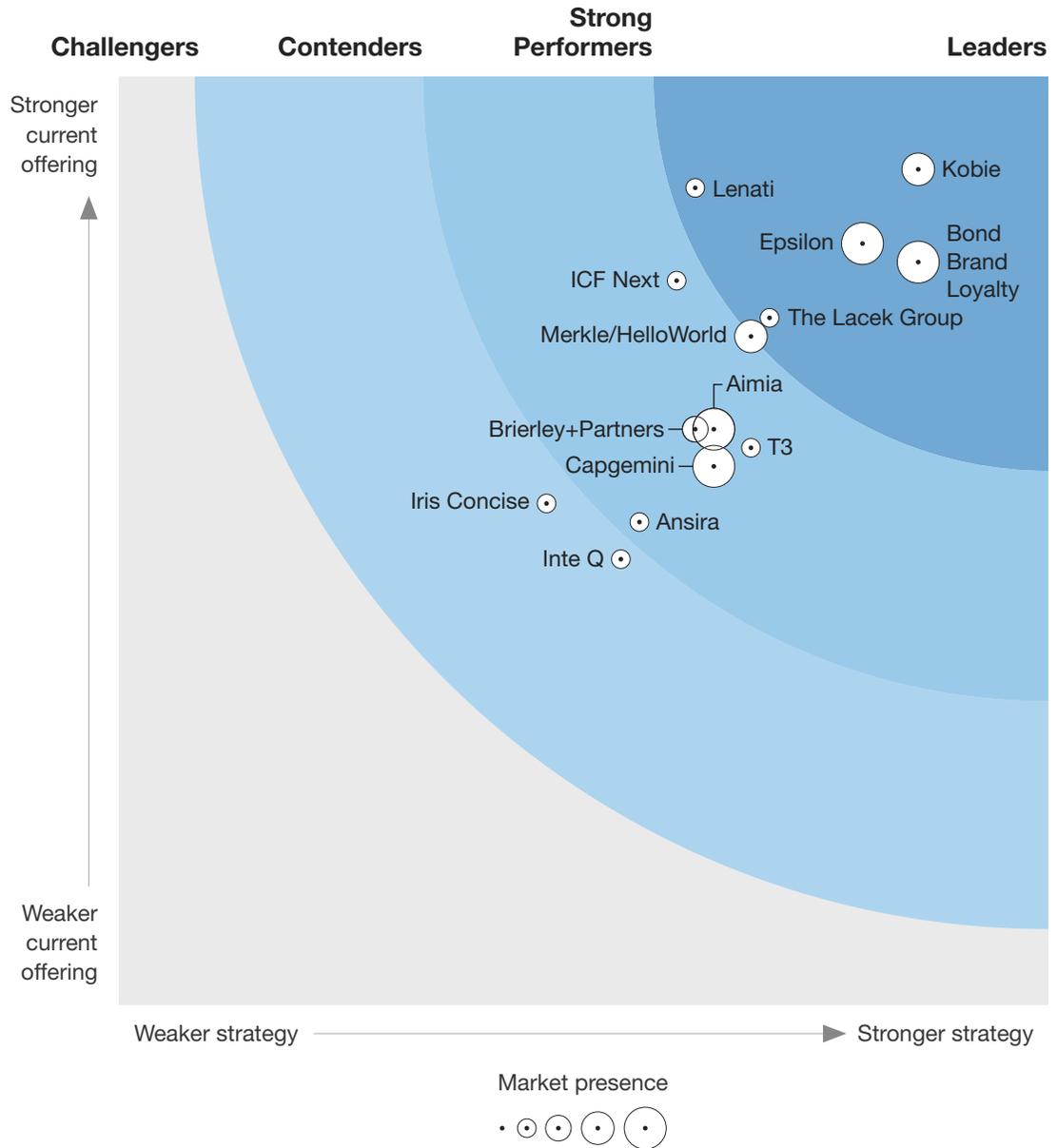
The 14 Providers That Matter Most And How They Stack Up

FIGURE 1 Forrester Wave™: Loyalty Service Providers, Q3 2019

THE FORRESTER WAVE™

Loyalty Service Providers

Q3 2019



The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: Loyalty Service Providers Scorecard, Q3 2019

	Forrester's weighting	Aimia	Ansira	Bond Brand Loyalty	Brierley+ Partners	Capgemini	Epsilon	ICF Next
Current offering	50%	3.10	2.60	4.00	3.10	2.90	4.10	3.90
Loyalty strategy services	15%	3.00	1.00	5.00	3.00	3.00	5.00	5.00
Loyalty program management services	5%	3.00	3.00	5.00	3.00	3.00	5.00	3.00
Marketing services	5%	3.00	3.00	5.00	3.00	5.00	5.00	3.00
Technology services	10%	3.00	3.00	5.00	3.00	5.00	3.00	3.00
Customer insights services	10%	3.00	3.00	3.00	3.00	1.00	3.00	5.00
Emotional loyalty measurement services	5%	3.00	1.00	3.00	5.00	1.00	5.00	3.00
Performance management services	10%	3.00	3.00	3.00	3.00	1.00	3.00	3.00
Creative services	5%	1.00	3.00	3.00	3.00	3.00	3.00	3.00
Experience design services	5%	1.00	3.00	3.00	3.00	3.00	3.00	3.00
Training services	5%	3.00	1.00	5.00	3.00	3.00	3.00	3.00
Data management services	5%	5.00	5.00	3.00	3.00	3.00	5.00	3.00
Privacy and security	5%	3.00	5.00	3.00	3.00	5.00	5.00	5.00
Account management	10%	5.00	3.00	5.00	3.00	3.00	5.00	5.00
Change management tools and services	5%	3.00	1.00	3.00	3.00	3.00	5.00	5.00
Strategy	50%	3.20	2.80	4.30	3.10	3.20	4.00	3.00
Vision and execution road map	30%	3.00	3.00	5.00	3.00	3.00	5.00	3.00
Innovation culture and road map	15%	3.00	3.00	5.00	3.00	3.00	3.00	3.00
Account retention	20%	3.00	3.00	5.00	5.00	3.00	5.00	3.00
Global support	10%	5.00	1.00	3.00	5.00	5.00	3.00	3.00
Employee experience	25%	3.00	3.00	3.00	1.00	3.00	3.00	3.00
Market presence	0%	4.75	1.25	4.25	2.50	4.50	5.00	1.75
Revenue/billings	50%	5.00	1.00	5.00	3.00	4.00	5.00	2.00
Loyalty clients	25%	5.00	2.00	4.00	2.00	5.00	5.00	2.00
Employees	25%	4.00	1.00	3.00	2.00	5.00	5.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

FIGURE 2 Forrester Wave™: Loyalty Service Providers Scorecard, Q3 2019 (Cont.)

	Forrester's weighting	Inte Q	Iris Concise Kobie	Lenati	Merkle/HelloWorld T3	The Lacek Group		
Current offering	50%	2.40	2.70	4.50	4.40	3.60	3.00	3.70
Loyalty strategy services	15%	3.00	3.00	5.00	5.00	3.00	3.00	3.00
Loyalty program management services	5%	3.00	3.00	5.00	3.00	5.00	3.00	3.00
Marketing services	5%	3.00	3.00	5.00	5.00	5.00	3.00	3.00
Technology services	10%	1.00	3.00	5.00	5.00	3.00	3.00	5.00
Customer insights services	10%	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Emotional loyalty measurement services	5%	5.00	1.00	5.00	3.00	3.00	3.00	3.00
Performance management services	10%	3.00	1.00	5.00	5.00	3.00	3.00	3.00
Creative services	5%	1.00	3.00	3.00	3.00	5.00	3.00	5.00
Experience design services	5%	1.00	3.00	3.00	5.00	5.00	3.00	5.00
Training services	5%	3.00	5.00	3.00	3.00	1.00	3.00	3.00
Data management services	5%	1.00	3.00	5.00	5.00	3.00	3.00	3.00
Privacy and security	5%	1.00	3.00	5.00	5.00	5.00	3.00	3.00
Account management	10%	3.00	3.00	5.00	5.00	5.00	3.00	5.00
Change management tools and services	5%	1.00	1.00	5.00	5.00	3.00	3.00	5.00
Strategy	50%	2.70	2.30	4.30	3.10	3.40	3.40	3.50
Vision and execution road map	30%	1.00	3.00	5.00	3.00	3.00	5.00	3.00
Innovation culture and road map	15%	3.00	1.00	5.00	3.00	3.00	3.00	3.00
Account retention	20%	3.00	1.00	5.00	1.00	5.00	3.00	3.00
Global support	10%	1.00	3.00	3.00	3.00	3.00	1.00	3.00
Employee experience	25%	5.00	3.00	3.00	5.00	3.00	3.00	5.00
Market presence	0%	1.75	1.25	3.50	1.75	3.75	1.50	1.50
Revenue/billings	50%	2.00	1.00	5.00	2.00	4.00	2.00	2.00
Loyalty clients	25%	2.00	2.00	3.00	1.00	5.00	1.00	1.00
Employees	25%	1.00	1.00	1.00	2.00	2.00	1.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

Vendor Offerings

Forrester included 14 vendors in this assessment: Aimia, Ansira, Bond Brand Loyalty, Brierley+Partners, Capgemini, Epsilon, ICF Next, Inte Q, Iris Concise, Kobie, The Lacek Group, Lenati, Merkle/HelloWorld, and T3 (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Evaluated vendors	Official service name
Aimia	SmartJourney
Ansira	N/A
Bond Brand Loyalty	Loyalty Services
Brierley+Partners	Loyalty Services
Capgemini	N/A
Epsilon	Loyalty Services
ICF Next	Loyalty and Customer Marketing
Inte Q	N/A
Iris Concise	Loyalty and CRM
Kobie	N/A
Lenati	Lenati Loyalty and Customer Engagement Practice
Merkle/HelloWorld	Human Loyalty
T3	Modern Loyalty
The Lacek Group	Loyalty Services

The Forrester Wave™: Loyalty Service Providers, Q3 2019
The 14 Providers That Matter Most And How They Stack Up

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **Kobie accelerates clients' ability to understand and earn emotional loyalty.** Kobie's mission is to grow enterprise value through loyalty. As such, it designs its services to help clients answer key questions about the role of loyalty in their organizations, assembling the right loyalty solution, growing and optimizing their strategies, and measuring results. Its service offering encompasses strategy consulting, analytics, creative agency, campaign management, and call center. It also has a proprietary methodology to measure and score emotional loyalty.

Kobie also offers its own loyalty technology platform, and it's clear from reference feedback that its services are where it really shines. Reference clients find Kobie easy to work with, are impressed with the talent it brings on board, and told us that its strategy consulting is "really good." Kobie takes a hands-on approach to partnering with its clients, but some references noted room for improvement in terms of process automation and its call center services. Still, Kobie's recent overhaul of its operations and client services is paying off, making it a good fit for companies looking for a loyalty provider invested in their success.

- › **Bond Brand Loyalty delivers loyalty strategy that challenges the status quo.** Bond Brand Loyalty views loyalty as the key to business growth and anticipatory experiences as the key to loyalty. It offers a full range of services to manage, market, and measure experiences targeted at retail, financial services, hospitality, and automotive companies. Bond goes to market as a tech-agnostic partner but has its own proprietary loyalty platform for execution as well. It invests significant resources in evangelizing its point of view through its annual Loyalty Report and in helping clients expand their thinking around loyalty — through human-centered design principles and techniques, applied data science, and a newly launched XO Lab for innovation.

Loyalty strategy is Bond's sweet spot, and it certainly showed in the client feedback we received. References called out its proactive thought leadership and strong strategy design: "They're forward thinking while also understanding what's practical near term." They also feel that Bond is genuinely interested in their success and is easy to work with. As for where it could improve? References want deeper expertise across the marketing mix, including channels like paid search and display, and want even more time for strategic discussions. Companies looking for an industry-leading strategy should put Bond on their shortlist.

- › **Epsilon delivers capabilities to build impactful interactions with loyal customers.** As the biggest loyalty practice we evaluated, Epsilon has thousands of employees focused on delivering loyalty services for enterprise firms across industries including retail, financial services, and travel and hospitality. Its full-service offering brings together traditional loyalty services like strategy and program design with omnichannel orchestration capabilities, analytics, and data augmentation to

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

make “every interaction count,” regardless of whether or not a consumer is enrolled in the loyalty program. In July 2019, Publicis Groupe completed its acquisition of Epsilon, but this change had no impact on Epsilon’s loyalty clients at the time of this evaluation.

Reference clients comment on Epsilon’s deep and expansive knowledge of the loyalty space, excellent execution capabilities, and impact: “All of their work drives incremental business.” But they would like to see Epsilon bring more innovative thinking, deliver value even faster, and improve its creative capabilities. Epsilon’s experience in the loyalty space and well-rounded offering make it a good fit for enterprises looking for a reliable and data-driven partner.

- › **Lenati works with clients to break the traditional “membership” mold.** Lenati’s platform-agnostic approach supports loyalty vision and strategy development, implementation, and program management. Even when the end result of its work is a loyalty program design, Lenati starts every client engagement with a broader frame of reference for loyalty as an outcome, not just a marketing practice. In 2018, it merged with ProKarma, adding capabilities to build and test the digital experiences it designs. Although loyalty is the tip of the spear for Lenati, its client engagements often lead to opportunities for personalization, mobile design and development, and experience design work.

Reference clients confirm that Lenati is well versed in providing strategy and operational support and commend it for the curious, confident, and proactive way it tackles their work. References offered few shortcomings, though one client said that it could better-tailor its deliverables to match the audience — at times its presentations are “too polished” for her teams. Companies looking to reboot their loyalty strategy and challenge their thinking will like Lenati’s approach.

- › **The Lacek Group blends experience with strong loyalty marketing capabilities.** For over 25 years, The Lacek Group has designed loyalty programs for some of the largest North American and global travel and hospitality, financial services, food and beverage, and retail brands. Now-ubiquitous features like no blackout dates originated from The Lacek Group strategy services engagements. It focuses its expansive offerings of loyalty marketing and customer engagement services on transforming loyalty programs to meet customers’ expectations and drive value to clients’ businesses.

Clients choose The Lacek Group for its experience and track record working with successful brands. They like its adaptability, consistency, and strength of analytics and loyalty marketing capabilities. They also appreciate its staff of “smart people who get things done” and its informed point of view. References noted that The Lacek Group takes feedback well and when issues do arise, it is able to improve quickly. They look to The Lacek Group as a source of loyalty expertise and expect it to continue to invest in talent and innovations that help it stay ahead of trends. The Lacek Group’s offering is best for large brands looking to improve their loyalty marketing mastery.

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

Strong Performers› **Merkle>HelloWorld uses promotional expertise to increase loyal customer engagement.**

Building emotional connections with customers regardless of tactic is at the core of Merkle/HelloWorld's trademarked "Human Loyalty" philosophy, which guides all of its client work. And HelloWorld's legacy experience in game management adds deep promotions management, digital engagement, and legal capabilities to its offering. As it moves further into the integration of its shared capabilities, Merkle/HelloWorld plans to invest in organizational optimization, developing a client advisory board, increasing its thought leadership IP, and leveraging Dentsu Aegis Network partners to expand its client offerings.

Reference clients like Merkle/HelloWorld's demonstrated expertise in loyalty, strong project management, and practical and proactive strategic advice. One reference explained that the account teams "empower clients with the expertise that they have in a nimble way. . . . I have a program, but I also feel very knowledgeable." They would welcome standardization of the pricing model and even more industry-specific expertise. Brands, especially those in consumer goods, high-tech, and healthcare, will appreciate Merkle/HelloWorld's broad and deep capabilities for loyalty and engagement marketing.

› **ICF Next is committed to humanizing its client's loyalty strategies.** ICF Next, formerly Olson 1to1, takes a consumer-centric approach to loyalty services based on proprietary research into key drivers of loyalty. Project teams use anthropology-based techniques to help clients understand what motivates and drives their consumers and develop strategies that establish emotional loyalty, not just habitual interactions. ICF Next does offer its own technology platform, Tally, but has a stated focus on augmenting, not replacing, clients' existing capabilities; about 35% of clients use both Tally and ICF Next's services.

Reference clients are very satisfied with ICF Next's insights services and account teams, offering high praise for its intelligence, consistency, and investment in client success: "They exceeded our expectations on every count." Still, clients would welcome improvements to execution capabilities and better leverage of ICF's expanded capability set. ICF Next is a best fit for travel and hospitality companies and retailers looking to build a thorough and thoughtful program that impacts consumers' emotional and behavioral drivers.

› **T3 designs experiences that earn customer loyalty.** Loyalty is a fast-growing practice for this Austin-based advertising agency, which serves predominantly North American clients in quick service restaurants (QSR), retail, and service industries. Its "Modern Loyalty" approach focuses on designing innovative experiences that drive loyalty by anticipating and exceeding customer expectations. T3's services span strategy, design, data, and financial modeling. While it is platform agnostic, T3 offers a technology microservices layer to assist with implementation and integration.

References confirm T3's commitment to innovation and appreciate its creative storytelling and "interesting way of thinking about loyalty and delivering on its ideas." And this commitment isn't

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

just in name only: T3 offers clients a 5% match on funds dedicated to innovation. Yet references would welcome improvements to T3's project management, noting that it's "not as strong in terms of execution and logistics." They also want to ensure that it maintains the quality of talent and skills as it grows. For companies looking for a new way to solve loyalty challenges, T3 offers a compelling approach.

- › **Aimia helps clients plan, execute, and measure loyalty across the customer journey.** Aimia is still in a transition period following the sale of Aeroplan last year, but it has a clear and focused point of view on the loyalty space and its offering: to make business personal so brands can have one-to-one relationships with their customers. Its proprietary SmartJourney methodology underpins all Aimia's loyalty services and helps clients methodically deliver personalized experiences. To help fulfill that vision, it's investing in enriched data assets, analytics, and brand partnerships services to help clients identify new ways to deliver value to consumers. Aimia serves a truly global client base with hundreds of clients in North America (NA), EMEA, and Asia Pacific (AP).

Clients like working with Aimia for its depth of knowledge in the loyalty space, strategic thinking, and "exceptional level of service." But while they feel that their programs are safe in Aimia's hands, they would like to see some improvements on the execution side, noting simplistic reporting, lackluster program rollout, and reactive versus proactive recommendations for program improvements. Aimia is a good fit for global retail, consumer packaged goods (CPG), and financial services firms looking to optimize loyal customer journeys.

- › **Brierley+Partners infuses existing programs with new perspectives.** Services are the heritage of this Dallas-area-based agency and are a stated passion point for its executive team. Its vision is to "shape a world where every relationship is meaningful," and much of the work it does today is focused on helping companies in NA and AP evolve their existing loyalty programs. Over the past few years, Brierley has invested in packaging its services to help clients get value faster, such as with its MXerator offering designed to enhance member engagement and its fast consulting modules to assist clients with things like journey mapping, loyalty training, emotional loyalty measurement, and program health assessments.

Its acquisition by NRI has resulted in additional resources to support new capability development and global expansion, but it's also brought change to the organization — including a new CEO. Still, the client experience remains high. References like that Brierley is flexible and easy to work with and specifically call out its strength of strategy and loyalty expertise. But they would like Brierley to be more proactive and close the gap between strategy and execution capabilities. It's a best fit for companies — especially in the retail or convenience sectors — looking for an experienced loyalty program and CRM specialist.

- › **Capgemini competes with industry-focused loyalty and design capabilities.** Not typically known for loyalty, this technology and digital transformation consultancy was a surprise entrant for this evaluation. Its customer engagement and loyalty capabilities are delivered in a matrixed

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

fashion: combining customer and data global practices with sector-specific offerings focused predominantly on retail, CPG, and financial services. Capgemini has a stated “human-centered approach” to loyalty transformation and plans to enhance its capabilities through acquisition — such as experience design agency LiquidHub in 2019 — and investment in research and customer engagement innovation.

The reference clients we spoke with selected Capgemini for its strong European presence and ability to strike a balance between creative vision and reality: “[It brings] real, practical strategies that can be acted upon.” However, working with such a massive organization — Capgemini has over 200K employees worldwide — can create some inconsistencies in terms of the client experience. References gave us mixed feedback on its flexibility, quality of staff, and analytics capabilities. Companies looking for a partner with bench strength in delivering digital customer engagement will like what Capgemini brings to the table.

- › **Ansira excels at executing loyalty logistics.** Ansira’s loyalty practice helps marketers deliver on four foundational pillars — loyalty beyond the program, customer experience, emotional connections, and local relevance — which align with its agency vision of meeting customer expectations at the brand and local level. Ansira’s customer relationship capabilities support both loyalty and CRM requirements — from program design to database operations, to analytics, to channel activation and optimization.

The references we spoke to like Ansira’s analytics chops, ability to uncover insights, and get-it-done nature. This isn’t a surprise given its database operations and analytics focus.⁴ They also appreciate Ansira’s level of service and how well it works with other agency partners. But that operational excellence sometimes comes at the expense of innovative thinking: References told us they would like to see Ansira be more proactive about bringing new ideas to the table. Brands, especially those in retail and QSR, looking for a data- and process-oriented execution partner will find themselves in capable hands.

Contenders

- › **Inte Q delivers custom and cost-effective loyalty services.** A key pillar of Inte Q’s agency vision to “create customer love” is a proprietary Customer Love score, which quantifies the emotional connection a customer has with a brand using a combination of emotional, transactional, and brand data. It also provides loyalty strategy, management, and measurement services, a dedicated paid loyalty program offering, and recently launched a personalization practice focused on helping clients personalize marketing at scale and maximize ROI.

Overall, Inte Q’s references are satisfied with its capabilities and the consistent quality of its talent. They view Inte Q as an extension of their own teams and appreciate the price-to-value ratio. One reference referred to Inte Q as “a hidden gem in the loyalty space,” noting that it’s good at taking small companies and helping them mature their approach. But they said that Inte Q can be very reactive in managing client relationships and can’t be relied on to be self-driven. For smaller

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

companies early in their loyalty journey looking for a partner to grow with, Inte Q delivers a big bang for your buck.

- › **Iris Concise is evolving its approach to loyalty services.** Iris Concise offers loyalty program design, execution, and loyalty marketing services. Since acquiring loyalty and marketing agency 89 Degrees in March of 2019, Iris Concise is in the process of integrating 89 Degrees' loyalty consulting and analytics capabilities with Iris Worldwide's creative, digital, and experiential services. Although the integration is still in its early days, the execution road map includes planned investments in loyalty design, thought leadership, and personalization capabilities. Iris Concise services its loyalty clients globally utilizing its 17 offices worldwide.

Overall, Iris Concise references reported mixed degrees of satisfaction with its offerings and service levels compared to others in the evaluation, citing recent issues with reliability and timeliness of deliverables. And reference feedback revealed that its current loyalty capabilities don't fully deliver on Iris Worldwide's more progressive agency tagline, "For the forward." Although references indicated that they'd like to see improvements in its ability to stay ahead of trends, they appreciate the time its account teams take to understand their business models and needs, optimize program results, and respond to new requests. Iris Concise's investments in advancing and emboldening its position with "Participation Loyalty" may appeal to potential clients looking to evolve their traditional points program.⁵

Evaluation Overview

We evaluated vendors against 22 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include loyalty strategy services, loyalty program management services, marketing services, technology services, customer insights services, emotional loyalty measurement services, performance management services, creative services, experience design services, training services, data management services, privacy and security, account management, and change management tools and services.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision and execution road map, innovation culture and road map, account retention, global support, and employee experience.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue/billings, loyalty clients, and employees.

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

Vendor Inclusion Criteria

Forrester included 14 vendors in the assessment: Aimia, Ansira, Bond Brand Loyalty, Brierley+Partners, Capgemini, Epsilon, ICF Next, Inte Q, Iris Concise, Kobie, The Lacek Group, Lenati, Merkle/HelloWorld, and T3. Each of these vendors:

- › Offers a portfolio of loyalty services to support strategy development, loyalty marketing, program management, analytics, and creative. If the vendor offers a technology solution, clients can engage it for services as a standalone engagement (i.e., technology is not required).
- › Has at least 20 clients using loyalty services, and at least 15 clients using two or more loyalty services.
- › Has at least \$20M USD in revenue from loyalty services.
- › Has a staff of at least 50 employees dedicated to loyalty service delivery.
- › Is deemed by analyst, buyers, and peers as a significant competitor in the loyalty services space (i.e., is frequently mentioned in client inquiries, vendor selection RFPs, shortlists, consulting projects, and case studies).

The Forrester Wave™: Loyalty Service Providers, Q3 2019
The 14 Providers That Matter Most And How They Stack Up

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

The Forrester Wave™: Loyalty Service Providers, Q3 2019

The 14 Providers That Matter Most And How They Stack Up

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by April 30 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

- ¹ Seventy-three percent of US online adults are members of a customer loyalty program. Source: Forrester Analytics Consumer Technographics® North American Retail And Travel Topic Insights 2 Survey, 2018.
And 44% agree that loyalty programs make them feel more loyal to the brand. Source: Forrester Analytics Consumer Technographics North American Online Benchmark Survey (Part 2), 2019.
- ² Twenty-nine percent of global B2C marketing decision makers say customer retention and loyalty is one of their most important marketing metrics. Source: Forrester Analytics Global Business Technographics Marketing Survey, 2018.
- ³ Every reference we surveyed has a loyalty program, and almost all consider tactics like email (92%) and CRM (87%) as part of their approach to building relationships with existing customers.
- ⁴ See the Forrester report "[The Forrester Wave™: Customer Database And Engagement Agencies, Q2 2018.](#)"
- ⁵ Iris is currently in the process of incorporating loyalty into its Participation Brands study, a global research framework that identifies brands with qualities such as passionate purpose, culture shaping, category innovating, people powered, and distinctive character.

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