Euromonitor International

First-Party vs Third-Party Loyalty: The Battle for the Foodservice Customer

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EXECUTIVE SUMMARY

First-Party vs Third-Party Loyalty: The Battle for the Foodservice Customer
Key findings

WHAT'S AT STAKE

Effective loyalty programmes must advance from marketing to retention engines
Who owns the customer relationship when loyalty moves beyond first-party channels?
What makes or breaks the modern loyalty programme?

FROM DISCOVERY TO VALUE: A LOYALTY GROWTH FRAMEWORK

First-party and third-party loyalty: Where competitive advantage lies

FROM DISCOVERY TO VALUE: A LOYALTY GROWTH FRAMEWORK

AI is moving loyalty into the brand consideration stage
Loyalty investment should be calibrated to market-level brand preference
The commercial value of loyalty sits beyond programme engagement
Turn established brand preference into higher-value loyalty

FIRST-PARTY AND THIRD-PARTY FULFILMENT

Scale without conversion leaves value on the table
Four questions that reveal how customer ownership changes loyalty economics
Uber Eats, DoorDash and Domino’s lead on digital engagement
McDonald’s wins on scale, Uber Eats and DoorDash win on retention
Brand-led search testing loyalty’s true impact
The real test: Does brand choice hold beyond the brand’s own channel?
GenAI is the new discovery layer - loyalty propositions need to be machine visible
AI discovery is shifting demand influence towards aggregators
First-party fulfilment loyalty case studies
Paid subscriptions - spend allocation engines shifting power to aggregators
Third-party fulfilment loyalty case studies
Brands have the scale, aggregators are gaining the relationship in secondary markets

THE PATH FORWARD

Recommendations/Opportunities for growth
Questions we are asking

APPENDIX

Metric definitions
Metric definitions

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/first-party-vs-third-party-loyalty-the-battle-for-the-foodservice-customer/report.