

THE TIPPING POINT:

***INSIDE CANADA'S CHANGING
LOYALTY LANDSCAPE***

CONTENTS

<i>CANADA: A LOYALTY MARKET SHAPED BY SHIFTING PRIORITIES AND VALUE-DRIVEN DECISIONS</i> _____	3
<i>AWARENESS MEETS ACTION: A PATH TO DIFFERENTIATION</i> _____	5
<i>ALIGNING LOYALTY PROGRAMS WITH THE NEEDS OF BUDGET-CONSCIOUS CONSUMERS</i> _____	7
<i>FROM DISCORDANT STRATEGIES TO UNIFIED GROWTH</i> _____	12
<i>TAILORING LOYALTY PROGRAMS TO CANADIAN CONSUMER PREFERENCES</i> _____	13
<i>DESIGNING LOYALTY PROGRAMS TO REFLECT CANADIAN VALUES</i> _____	17

ABOUT iSEATZ

iSeatz drives enduring brand loyalty through exceptional, connected experiences. Our digital commerce and loyalty tech solutions enable travel and lifestyle bookings that drive engagement and customer lifetime value. Our clients represent the best in travel, hospitality, and financial services, including American Express, IHG Hotels & Resorts, and Wyndham Hotels & Resorts. Backed by proven deliverability, reliable advanced analytics, and travel lifecycle expertise, iSeatz sets the bar for a superb journey from the very first search. Visit [iSeatz.com](https://www.iseatz.com) to learn more.

ABOUT THIS REPORT

This report is based on two online surveys conducted by iSeatz in November and December 2024. The first survey collected responses from 1,136 Canadian consumers enrolled in loyalty programs offering travel-related rewards, examining their perceptions of loyalty and travel preferences. To ensure accuracy, results were weighted for demographic representation. The second survey gathered insights from 116 loyalty and marketing professionals in Canada, focusing on their program challenges and priorities. These responses were reported without weighting.

This is one of two Tipping Point reports released this year. The second, [available here](#), examines the U.S. travel loyalty market based on a similar survey of American consumers and loyalty program professionals as well as two prior years of survey data.

CANADA: A LOYALTY MARKET SHAPED BY SHIFTING PRIORITIES AND VALUE-DRIVEN DECISIONS

Over the past three years, our **Tipping Point for Loyalty series** has uncovered the disconnects between consumer expectations and industry priorities within travel loyalty programs. We have surveyed thousands of U.S. consumers to understand their perspectives on travel loyalty programs and preferences, alongside polling hundreds of loyalty professionals to explore their key challenges and priorities.

This year, we expanded our research to Canada, surveying 1,136 Canadians enrolled in loyalty programs with travel rewards and 116 loyalty and marketing professionals across the Canadian travel, hospitality, retail, financial services, and gaming sectors.

With 54% of Canadians belonging to three to five loyalty programs, according to our findings, and the loyalty market projected to grow at a CAGR of 8.7% over the next four years to reach **CAD \$7.09 billion by 2028**, the Canadian travel loyalty landscape presents significant growth potential for brands prepared to capitalize on it.

As our findings reveal, Canadian loyalty programs are attuned to their customers' wants and needs, yet opportunities remain to drive stronger ROI and deeper engagement through advancements such as AI-driven personalization. These advancements should align with Canadians' evolving booking behaviours, unique preferences, and expectations while addressing critical value gaps. While this report focuses on Canadian attitudes, we also incorporate select U.S. findings to highlight key similarities and differences between the two markets, offering loyalty programs valuable insights into what is at stake.

While Canada shares some similarities with its North American neighbour, it remains a distinct and dynamic market. Key sectors like grocery, travel, and financial services are marked by widespread consolidation, yet brand loyalty is far from guaranteed—it must be consistently earned. Canadians are notably value-conscious, prioritizing price and cost-saving deals above all else. This mindset is evident in their shopping habits: nearly 90%

stock up on their favourite products during sales, and **57% visit multiple stores to secure the best prices on different items.**

Recent inflationary pressures have further entrenched these consumption habits, positioning loyalty programs as key differentiators for consumer-facing brands. The latest LoyalT study reveals that nearly one-third of Canadians adjusted their product choices in 2024 to maximize loyalty point accumulation—**an increase from 27% in 2023 and 23% in 2021.**

Brands can leverage this trend to connect with consumers through value-driven loyalty rewards, particularly travel benefits. Why focus on travel? In the first quarter of 2024 **(the latest period with official statistics)**, Canadian residents took 3.5 million overseas trips—a 58.9% increase compared to the same quarter in 2023. Most travelled for leisure, spending \$3.6 billion on accommodations and \$1.7 billion on food and drink. By offering the right blend of travel rewards and diverse earning opportunities, brands can empower Canadians to achieve the aspirational trips they value most.



WHY FOCUS ON TRAVEL?

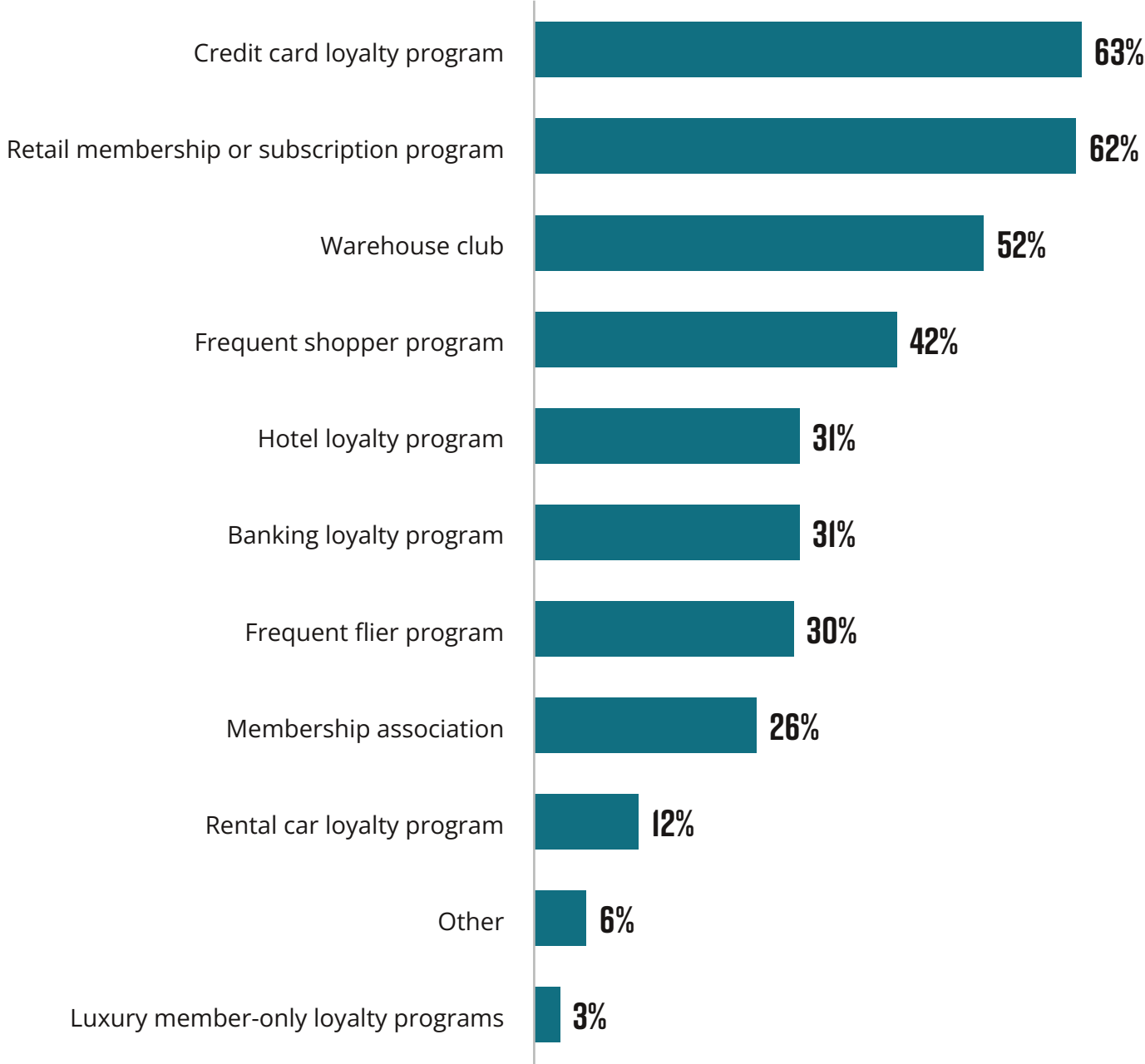
In the first quarter of 2024 Canadian residents took **3.5 million** overseas trips—a **58.9%** increase compared to the same quarter in 2023

A SNAPSHOT OF CANADIAN LOYALTY PROGRAM MEMBERS

Over 60% of surveyed Canadians are members of credit card loyalty programs with travel benefits, the most popular loyalty program type, followed closely by retail membership or subscription programs. Around 30% participate in banking, frequent flyer, and hotel loyalty programs, while 52% are warehouse club members and 42% are frequent shopper members. Credit card loyalty programs also dominate in terms of usage; 32% of Canadians say they use their credit card programs the most, compared to just 21% for retail and subscription programs and 19% for frequent shopper programs.

Demographically, nearly 30% of respondents live in households with children under 18, and 44% report household incomes of \$100,000 or more. Gen Z and Millennials form the most significant cohort at 43%, followed by Gen X at 25% and Baby Boomers at 29%.

WHAT TYPES OF LOYALTY PROGRAMS, IF ANY, DO YOU BELONG TO?



AWARENESS MEETS ACTION: A PATH TO DIFFERENTIATION

As loyalty programs lean into Canadians' strong appetite for travel, they must also confront a recurring disconnect highlighted in previous **iSeatz surveys**: the gap between how brands and consumers perceive the value of loyalty programs in terms of usefulness when planning travel and overall user experience.

While 54% of Canadian respondents report being members of three to five loyalty programs with travel rewards, only 25% say more than two offer booking capabilities. Even more striking, just 21% say their program includes a travel booking website, compared to 96% of surveyed travel marketing and loyalty professionals who claim to provide one.

These features are either not effectively promoted or are overlooked by consumers due to a perceived lack of utility, relevance, or value. Either way, this awareness gap presents an opportunity for loyalty programs to improve how they showcase their existing travel booking capabilities and develop new ones that will be appreciated and utilized.

When consumers do book travel through loyalty programs, many—58%—encounter frustrations with the user experience: 20% find earning and redemption rules confusing, another 20% are frustrated by the inability to book all desired options in one place, 11% dislike being redirected to another site for booking or payment, and 7% cite clunky or slow websites. Among luxury program members, these frustrations rise to 70%, making clear the critical importance of delivering a streamlined, high-quality user experience for this high-value segment.

In contrast, only 9% of brands identify user experience as their primary loyalty program challenge. While 27% of Canadian businesses recognize UX as an area for improvement, its relatively low prioritization indicates a lack of urgency around addressing and investing in this area despite customer expectations.

Additionally, Canadian brands and consumers hold slightly different views on the role of loyalty programs in travel planning. Nearly 60% of loyalty professionals believe their program is members' first choice for booking travel, yet only 51% of consumers report visiting their loyalty program's website first when considering booking a trip.

BREAK INTO THE U.S. MARKET

Get your copy of *The Tipping Point: How U.S. Travel Loyalty is Evolving—A Three-Year Perspective*

[DOWNLOAD HERE](#)

THE TIPPING POINT:
HOW U.S. TRAVEL LOYALTY IS EVOLVING
A THREE-YEAR PERSPECTIVE

2025

36% OF U.S. CONSUMERS SAY THAT THEIR TRAVEL LOYALTY PROGRAM INFLUENCES THEM TO SPEND OR TRANSACT MORE WITH THE BRAND IN ORDER TO EARN MORE POINTS TOWARD TRAVEL.

Yet even with broad alignment on travel reward availability and the positive correlation with interaction and spending gaps remains, revealing room for further development. For example, 66% of brands think they are their members' first choice for travel booking, compared to only 56% of consumers who say they turn to their loyalty program first. This shows that brands can improve their programs' travel booking capabilities and become top-of-mind when their members are in their travel planning and purchasing stages.

DISCONNECT: 66% of brands think their loyalty program is their members' first choice for travel booking, but only 56% of consumers say the same.

HOW DO THE TRAVEL LOYALTY PROGRAMS YOU BELONG TO IMPACT YOUR RELATIONSHIPS WITH THOSE BRANDS?

Relationship Impact	2023	2024
They don't impact my relationships at all	14%	24%
I feel like the brand understands my needs and preferences better	21%	31%
I interact with the brand (visit the website, use the app, etc.) more frequently because of the travel loyalty program	33%	40%
I deliberately avoid competing brands even when they have lower prices or rates to maintain my loyalty status	13%	21%
I often recommend the brand to my friends and colleagues	26%	34%
I tend to spend more/transact more frequently with the brand to earn points toward travel	30%	36%

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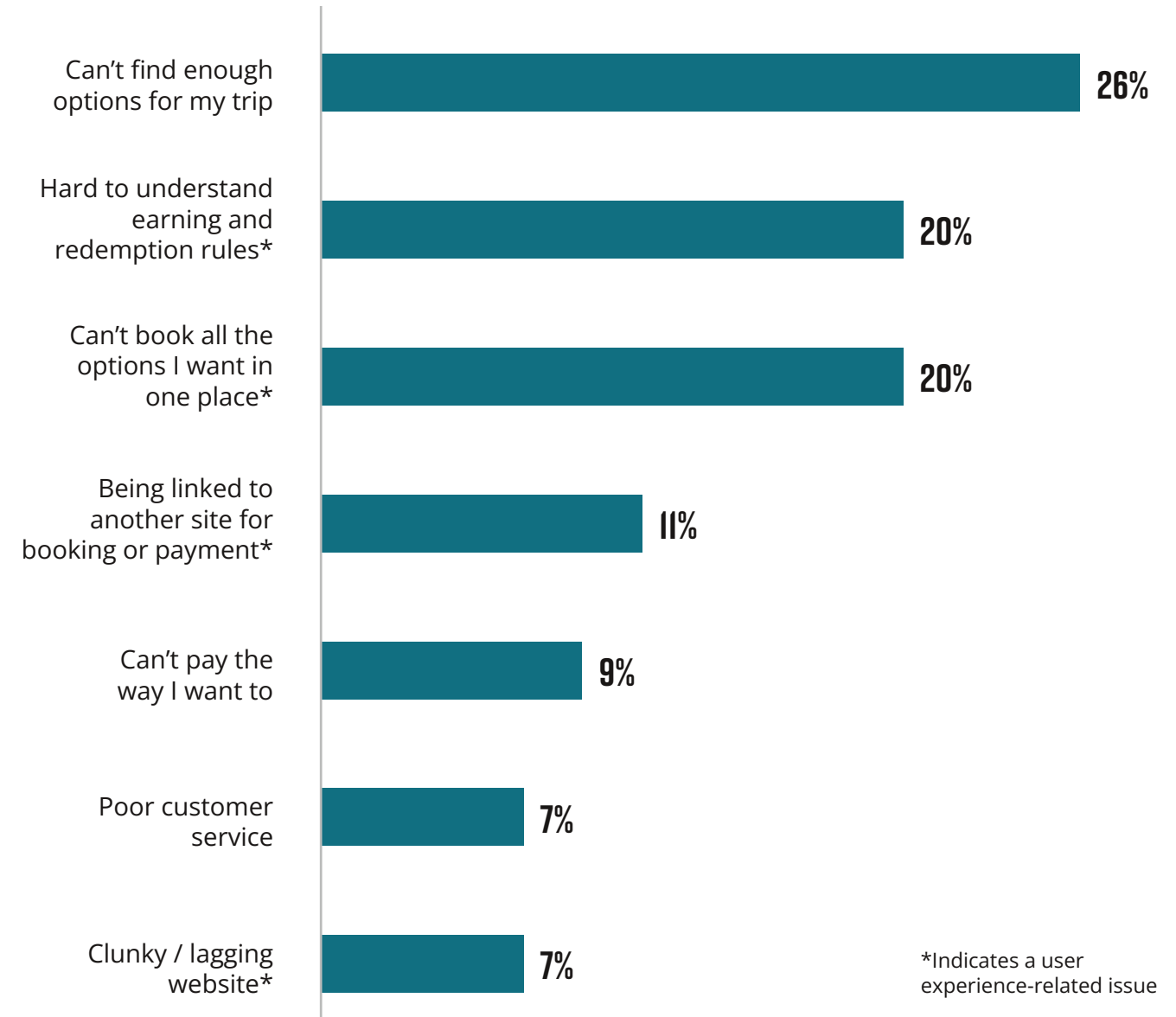
THE AWARENESS DISCONNECT

Brands and consumers often diverge in how they perceive loyalty programs, limiting customers' ability to access and appreciate their full value. This includes the stark gulf in awareness of travel booking capabilities: **96%** of brands claim to offer a travel booking portal, but only **21%** of Canadian consumers know about its availability. Loyalty programs that make these features more visible and user-friendly can close this disconnect, better meeting consumer expectations and outperforming competitors.

THE USER EXPERIENCE DISCONNECT

Brands and Canadian consumers hold strikingly different views on the loyalty program user experience. While **58%** of consumers report frustrations with program user experience, only **9%** of brands consider it a top priority. By adopting modern loyalty platforms that prioritize intuitive design, deliver personalized, relevant content, and offer a flexible and comprehensive rewards inventory, loyalty programs can better demonstrate their unique value and benefits and strengthen their presence among Canadian consumers.

WHEN BOOKING TRAVEL THROUGH YOUR LOYALTY PROGRAM, WHAT DO YOU FIND MOST FRUSTRATING?



ALIGNING LOYALTY PROGRAMS WITH THE NEEDS OF BUDGET-CONSCIOUS CONSUMERS

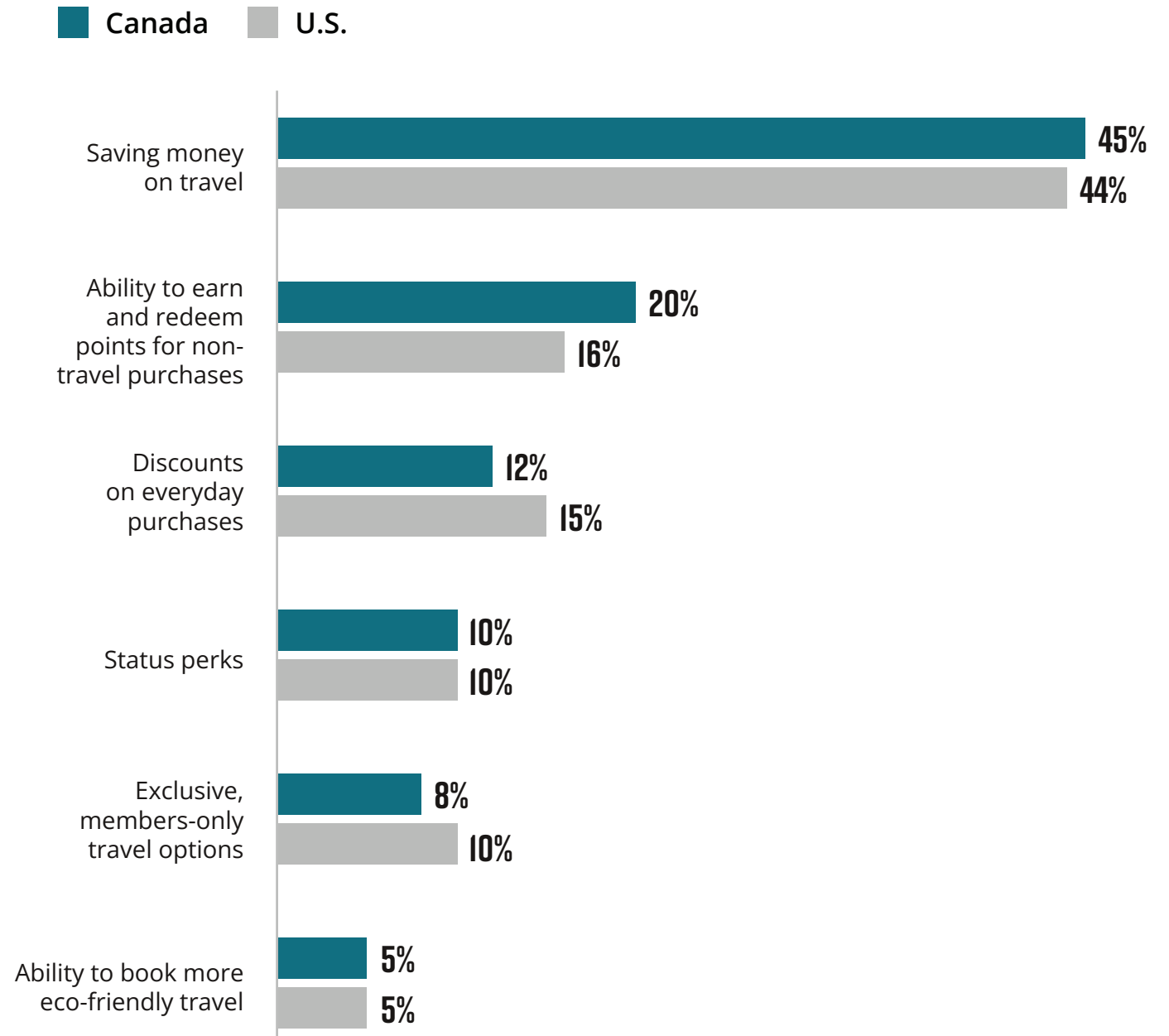
The state of the economy has impacted consumer spending globally, but Canadians are particularly cautious—**more so than their American counterparts**. This careful mindset extends to their travel spending habits. As the majority of Canadian loyalty programs primarily target the general public (39%) or value-conscious consumers (29%), understanding the needs of cost-cautious Canadian consumers is particularly important.

Our survey found that for 45% of Canadians, saving money on travel is the most important feature of a travel loyalty program, slightly above the 44% of Americans who share this view. However, Canadians display a stronger preference for earning and redeeming points on non-travel purchases (20% vs. 16%) and show less interest in exclusive, members-only travel options (8% vs. 10%).

Although Canadians are willing to adjust their product choices to maximize loyalty point accumulation, 43% will not spend more than 10% extra on travel products or services to earn additional points, and one-third refuse to spend any extra. By contrast, only 20% of Americans are unwilling to pay extra, illustrating a more conservative Canadian market where the value of additional spending is not as widely appreciated.

Could Canadian loyalty program members be persuaded to spend more if the incentives were more explicit or the cost-benefit more transparent? Survey results indicate they are willing to engage and spend more under the right conditions.

WHAT DO YOU VALUE MOST IN A TRAVEL LOYALTY PROGRAM?



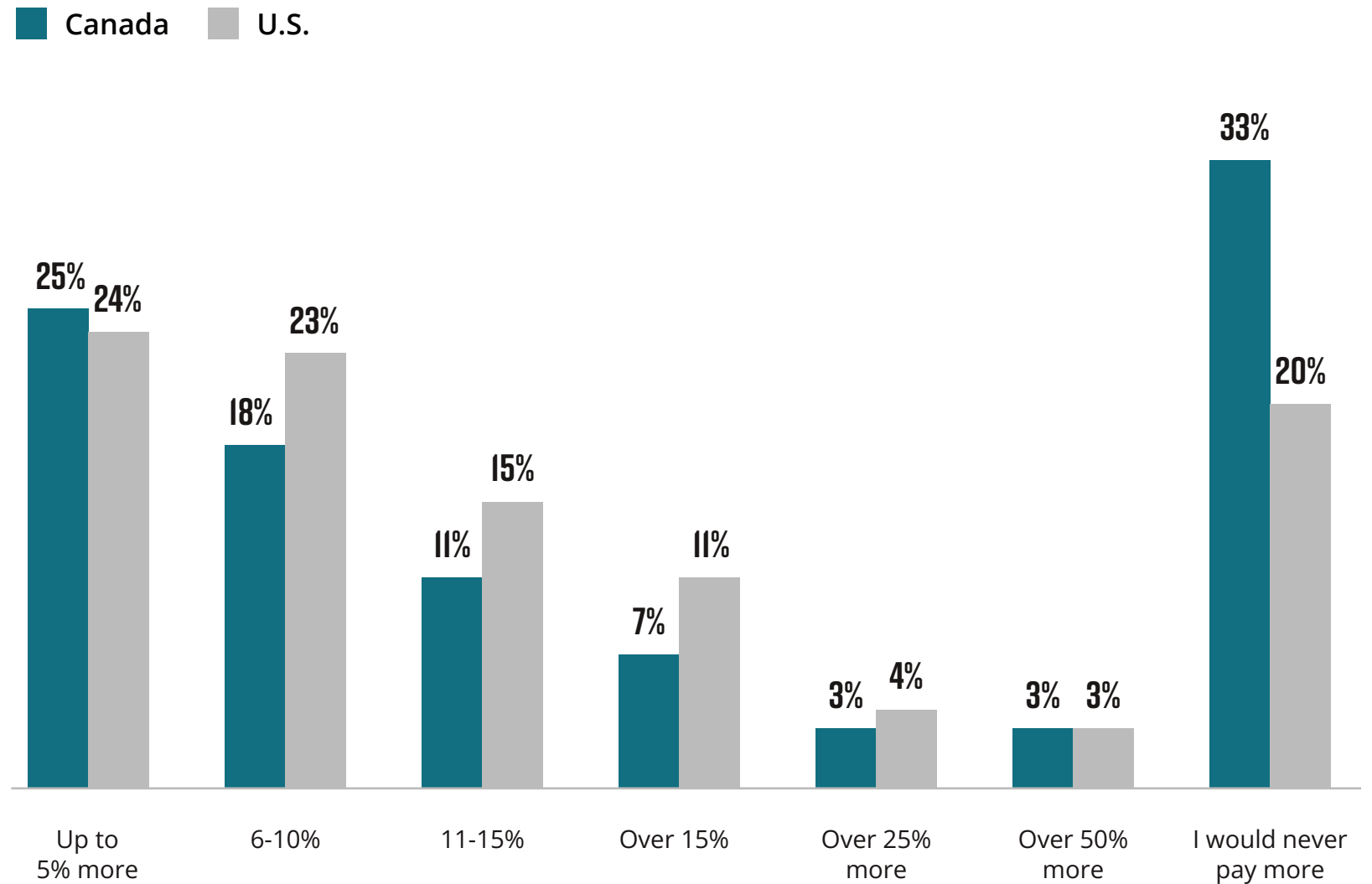
Key factors include easier point accumulation, assurance of better deals than those offered on other travel sites, and a more straightforward and intuitive points redemption process.

These findings highlight the need to simplify earning and redemption processes while demonstrating the value and savings loyalty programs offer for travel purchases or redemptions. Canadian brands are aware of these challenges, even if execution remains difficult: 52% cite perceived value compared to OTAs as their biggest travel-related obstacle, followed by outdated user experiences and a lack of options that members desire.

By expanding and diversifying their rewards portfolios and partnering with suppliers that offer the right travel options, Canadian loyalty programs can overcome these challenges while giving members more ways to earn and redeem points across many brands. This approach also supports Canadians using points for everyday purchases like groceries—a top lifestyle reward for nearly one-third of respondents. On this front, brands and consumers are closely aligned: 38% plan to introduce grocery rewards, and 41% aim to add food delivery options to their portfolios within the year.

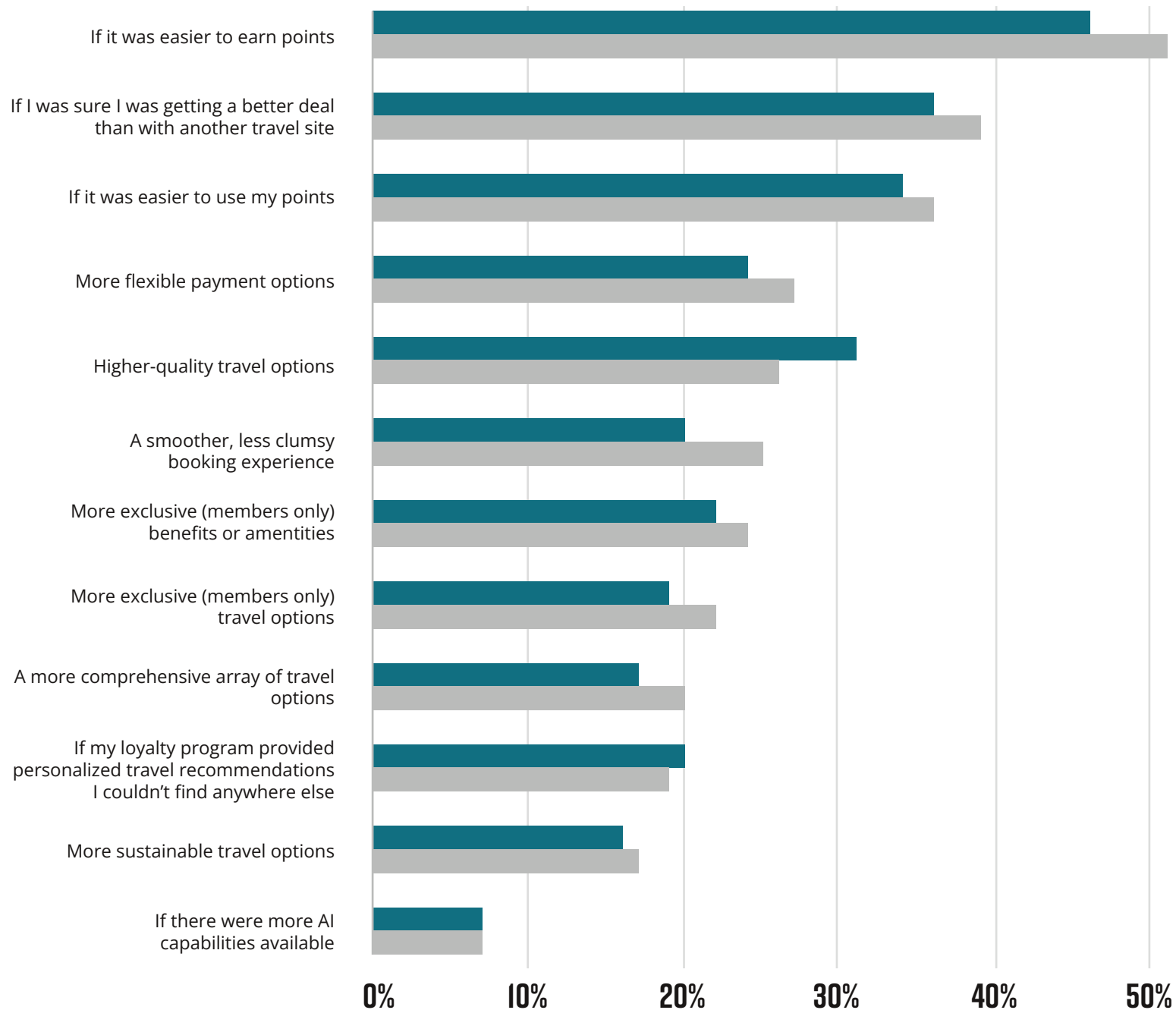
These two “everyday value” rewards stand out from other lifestyle rewards, such as live events (29%), gift cards (27%), dining (25%), and charitable giving (23%). Collectively, these trends indicate that Canadian brands are responding to macroeconomic pressures and consumer concerns about daily costs while working to create more balanced portfolios of travel-adjacent lifestyle rewards.

HOW MUCH MORE WOULD YOU BE WILLING TO SPEND ON A TRAVEL PRODUCT OR SERVICE THROUGH YOUR LOYALTY PROGRAM TO EARN EXTRA POINTS?

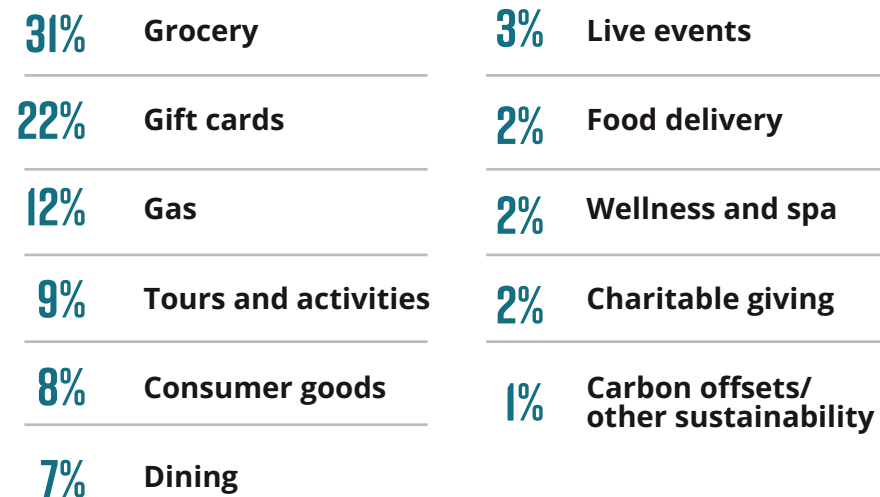


WITH MY LOYALTY PROGRAM I WOULD...

■ Book travel more frequently ■ Spend more when booking a trip



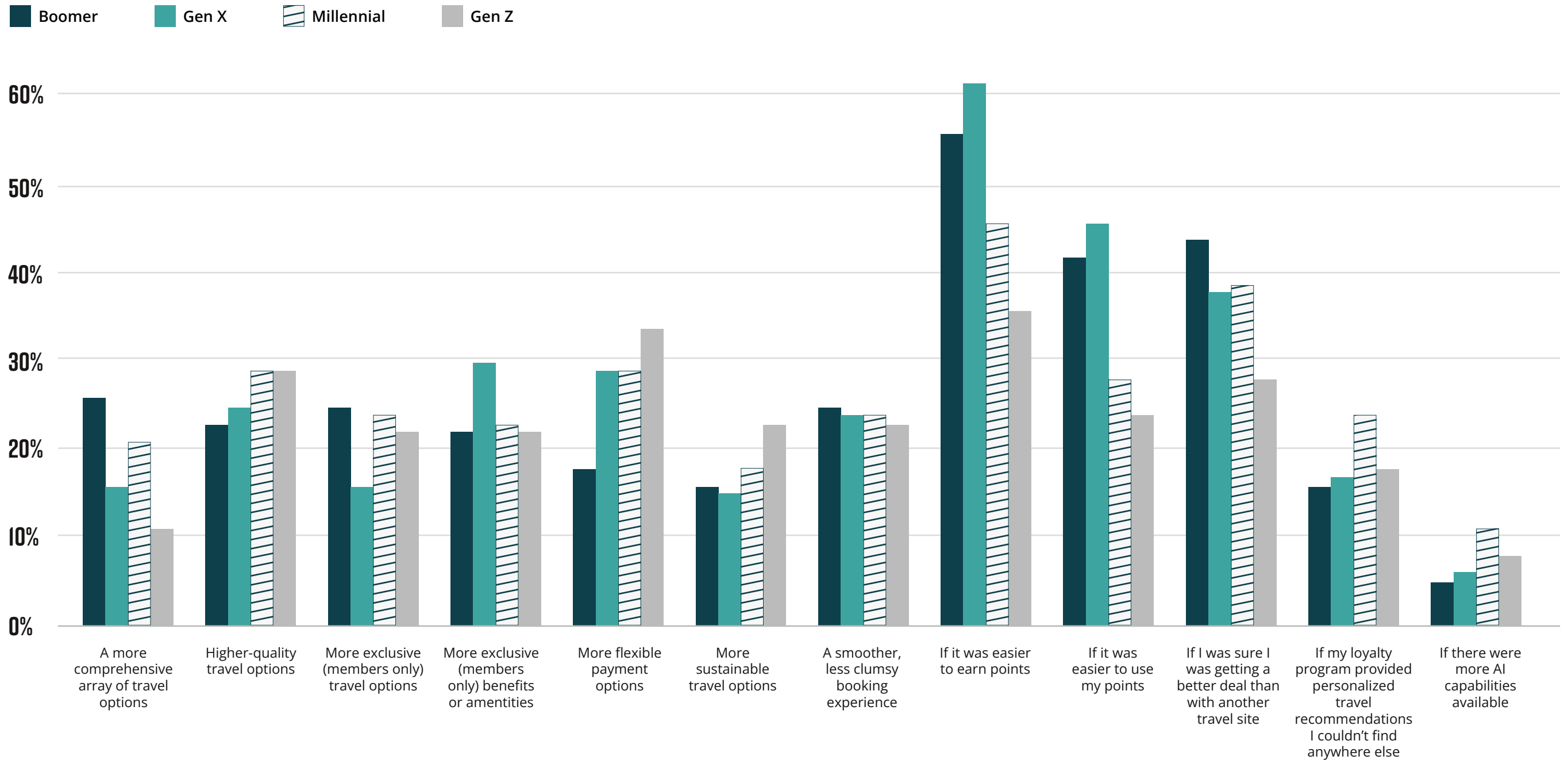
WHAT LIFESTYLE REWARDS DO YOU PREFER TO REDEEM YOUR LOYALTY POINTS FOR?



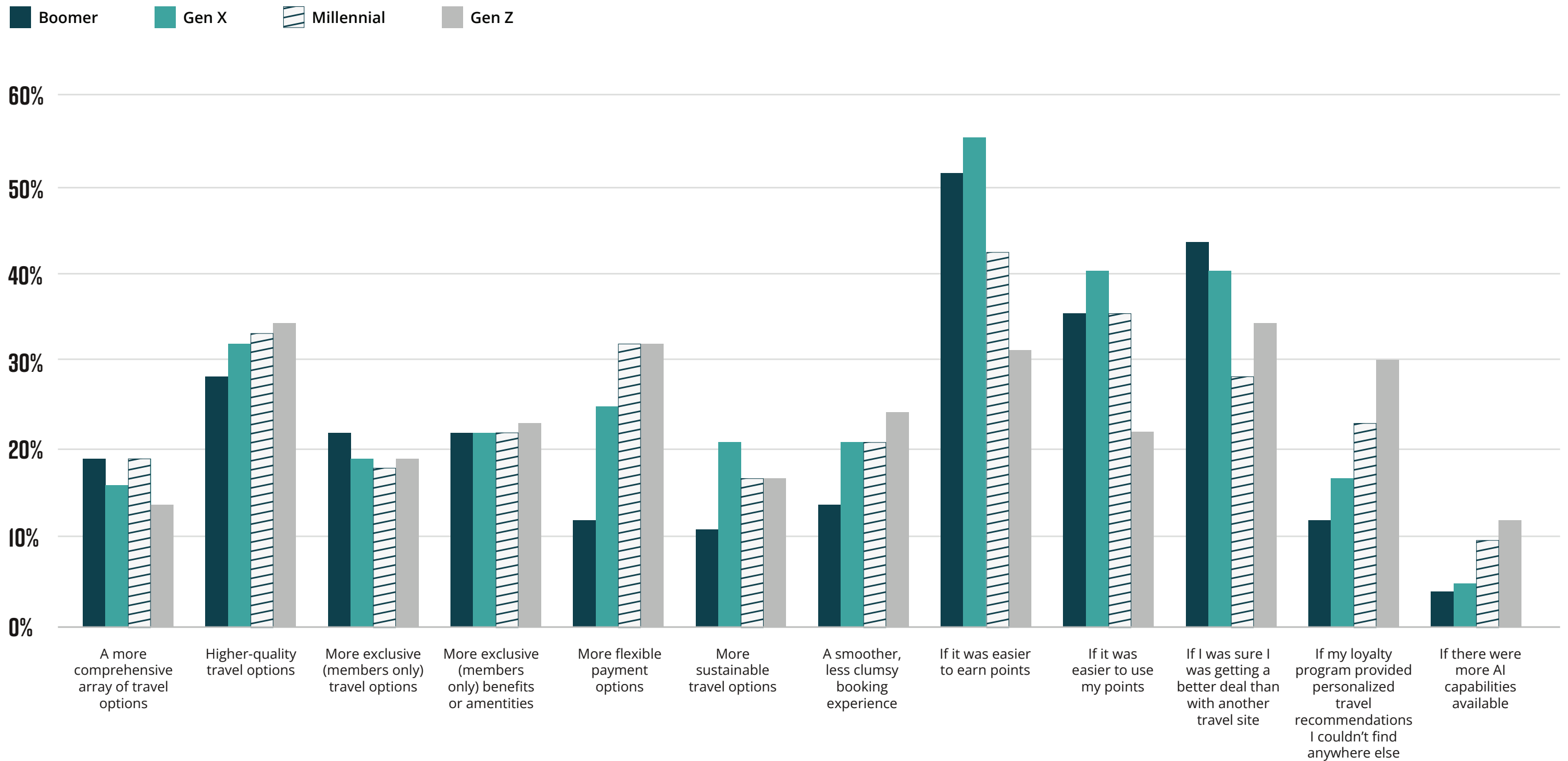
THE GENERATIONAL SHIFT: NOTES FOR TARGETED GROWTH

Survey data reveals a clear generational divide in spending priorities and loyalty program engagement. Gen Z separates itself from Baby Boomers, Gen X, and even Millennials in its preferences. While older groups consistently prioritize point accumulation and redemption, Gen Z places greater emphasis on access to high-quality travel options. They are also the most likely cohort to engage with loyalty programs when personalized travel recommendations that are unavailable elsewhere are offered. These responses highlight the importance of adapting loyalty strategies to broad generational values and individual preferences.

WHAT WOULD MAKE YOU USE YOUR LOYALTY PROGRAM TO BOOK TRAVEL MORE FREQUENTLY?



WHAT WOULD MAKE YOU SPEND MORE MONEY USING YOUR LOYALTY PROGRAM TO BOOK A TRIP?



FROM DISCORDANT STRATEGIES TO UNIFIED GROWTH

Brands must align their strategies and goals to capitalize on the loyalty opportunity effectively. Based on responses from our B2B survey, a fundamental mismatch between strategic aims and performance metrics threatens the ability to drive customer engagement and realize maximum revenue potential.

Overall, Canadian businesses prioritize revenue and customer retention when measuring their programs' performance, with 50% of respondents stating that revenue generation is their most pressing business challenge. However, when setting goals, most are more concerned with competitive pressure and balance sheet implications. While these misalignments may stem from structural factors, they could also arise from a technology ecosystem that fails to bridge these strategies and goals.

THE PERSONALIZATION DISCONNECT: 83% of Canadian consumers consider personalized travel offers important, but only 23% of Canadian brands believe their platforms' personalization capabilities need improvement.

THE STRATEGY DISCONNECT: Brands' goals and performance metrics are often out of sync. By investing in flexible, scalable technology, they can create more relevant, adaptable programs that strengthen their market position and align KPIs with strategic objectives.

LEVERAGING FLEXIBLE TECHNOLOGY FOR ENGAGEMENT

Travel technology platforms must be able to quickly adapt, expand booking options, and deliver a tailored user experience. Staying relevant and engaged with members and their ever-evolving preferences and priorities requires a flexible, responsive, and configurable system capable of scaling efficiently and integrating seamlessly into existing technology stacks, including non-loyalty CRMs. A travel loyalty platform that prioritizes APIs over static, black-box systems gains the flexibility necessary to stay ahead of shifting consumer expectations.

Personalization is a key aspect of that adaptability. Presenting tailored travel content and offers to individual members increases their likelihood of booking by providing options that align with their preferences. According to our survey, 83% of Canadians consider personalized travel offers important, with 52%—and 78% of Gen Z respondents—ranking them as extremely or very important.

Yet only 8% of consumers report receiving personalized offers between booking and the day of travel. This gap points not to a strategic oversight but a technological limitation. Integrated AI represents another shortcoming—but one that Canadian loyalty brands are beginning to address.

While these brands recognize the importance of AI in loyalty programs, 42% identify implementation as a significant challenge. Nearly a quarter also acknowledge that their current AI capabilities need improvement. To address this, 26% of companies are investing in AI, with 17% focusing specifically on personalization tools.

Personalization increases program relevance and AI supercharges this function. AI can accelerate loyalty programs' journey from first-party consumer data—which they have in abundance—to rich insights that fuel dynamically tailored content, bespoke packages and bundles, and individualized offers. Each of these capabilities boosts program relevance and are better able to engage members and encourage spending. The result is stronger revenue and improved retention while creating real differentiation and aligning strategies and goals effectively.

TAILORING LOYALTY TO CANADIAN CONSUMER PREFERENCES

Travel rewards programs can significantly improve brand interactions—and program revenue. **Our survey found that 37% of Canadians spend more frequently with brands to earn travel reward points**, while nearly 40% engage more often with their digital platforms because of their loyalty programs. However, only 22% feel these programs improve the brand’s understanding of their needs and preferences. Improving this number is crucial for driving long-term customer lifetime value and meeting stakeholders’ ROI expectations. What, then, are Canadian loyalty program members’ foremost needs and preferences?

THE BUSINESS CASE FOR SUSTAINABLE TRAVEL REWARDS

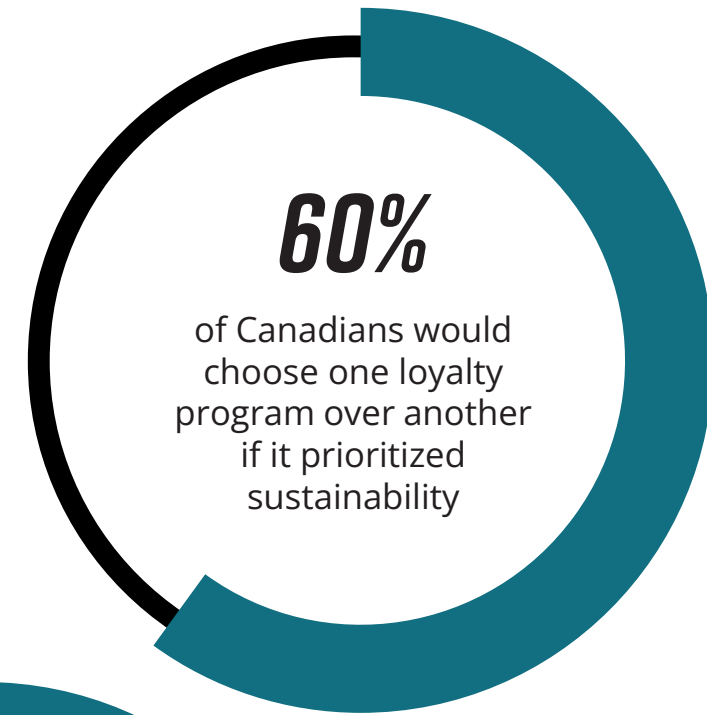
First, Canadians value environmental responsibility and expect their loyalty programs to reflect this priority. As sustainability-conscious consumers, more than three in five Canadians describe climate change as a “major crisis,” and **71% believe corporations should take more decisive action to address it.**

This sentiment is echoed in our survey: 53% of Canadians reported increased concern about sustainability in 2024, a figure that rises sharply to 74% among Gen Z. This concern drives action, with **60% of respondents overall**—and 85% of Gen Z—indicating they would choose a loyalty program that prioritizes sustainability.

Specific sustainability initiatives that would encourage Canadians to book or spend through their loyalty programs include offering bonuses or incentives for booking sustainable options (38%), providing opportunities to book destination activities that benefit local communities (26%), and access to hotels with established sustainability features (26%).

There’s promising progress among Canadian brands in addressing the demand for sustainability: 58% now offer bonuses or incentives for booking sustainable options, and 47% prioritize suppliers who actively reduce their environmental impact. These actions are leading to meaningful outcomes, with 36% of businesses reporting increased revenue.

ECO-FRIENDLY TRAVEL IS IMPORTANT TO CANADIANS



Nearly one-third of brand respondents noted that travellers choosing sustainable options tend to spend more on travel. Additionally, 31% indicated that these travellers are more likely to belong to higher membership tiers, and approximately 30% credited sustainable offerings with reducing member churn, increasing program engagement, and driving incremental spending.

Travel rewards programs face significant hurdles in advancing sustainability efforts. Nearly 40% report challenges in validating whether a partner is truly sustainable, 32% cite a lack of technology to offer sustainable travel options, and 16% struggle with measuring the ROI of sustainability initiatives. Addressing these obstacles requires collaboration with partners who bring a strong supplier network and the technology to effectively scale and promote sustainability-focused travel options, as well as advanced business intelligence capabilities to monitor and assess ROI.

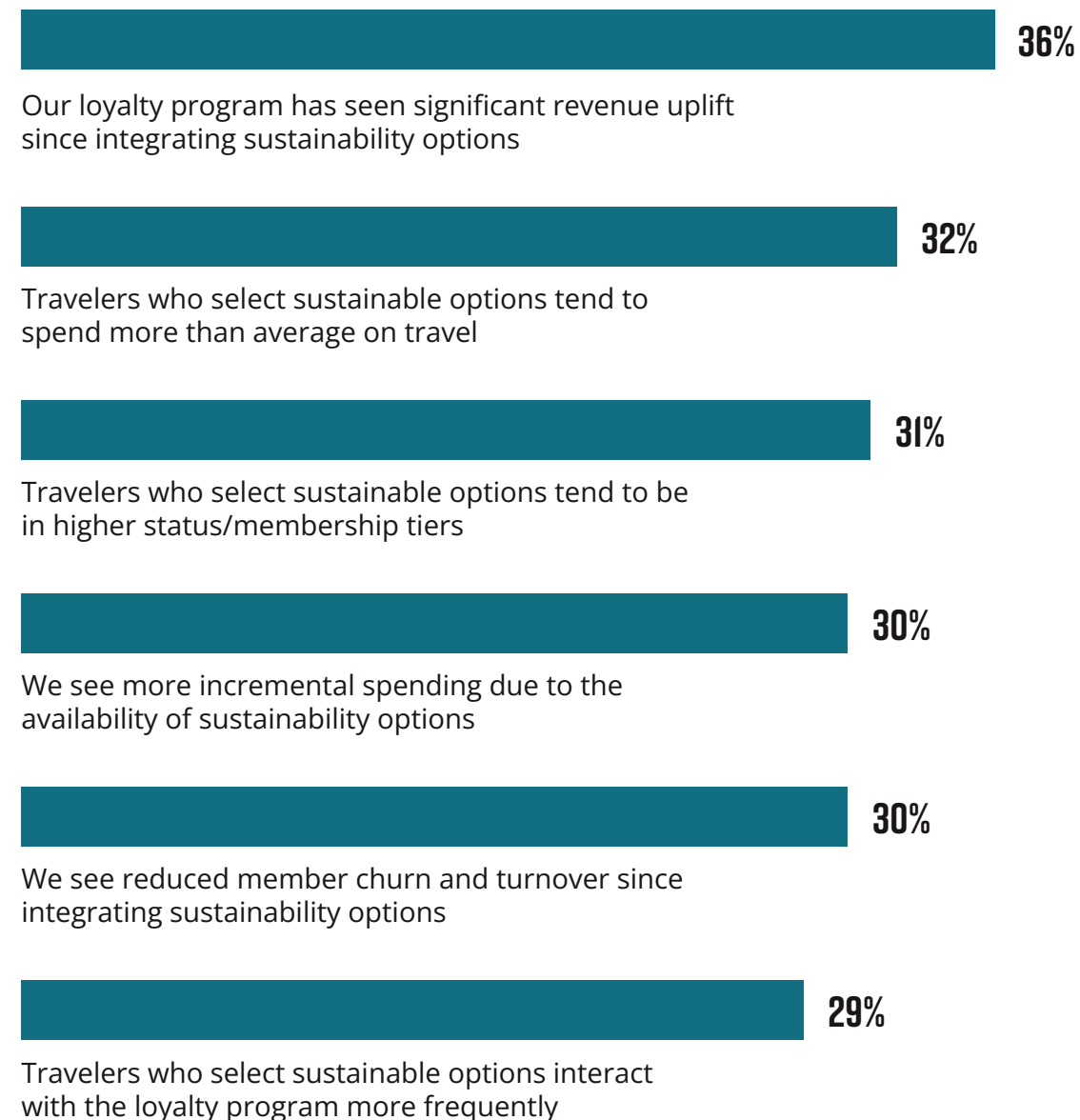
PAYMENTS: A KEY DIFFERENTIATOR

Canadians want their travel loyalty programs to help manage financial risk while prioritizing affordability. Nearly 50% value the ability to cancel for any reason, 45% look for price drop guarantees, and 33% are interested in tools like price alerts and fare freezing. While the most popular payment tools Canadians favour focus on cost and value, there is growing interest in flexible options such as Buy Now, Pay Later, split payments, digital wallets, support for multiple currencies, and alternative payment methods. These features are not just nice-to-haves—they actively influence purchasing decisions.

While 27% of Canadians say flexible payments would encourage them to book travel more often and 24% to spend more, figures are even higher among Gen Z, at 34% and 32%, respectively. This trend reflects a growing preference among younger consumers to enjoy travel experiences without the pressure of paying in full upfront.

To meet these needs, brands are increasing investments in fintech solutions that balance payment flexibility with effective risk management, directly responding to what Canadian consumers value most.

HOW HAS THE AVAILABILITY OF SUSTAINABLE OPTIONS IMPACTED YOUR BUSINESS OVER THE PAST 12 MONTHS?



CANADIAN FAMILIES HAVE STRONG OPINIONS... AND EXPECTATIONS

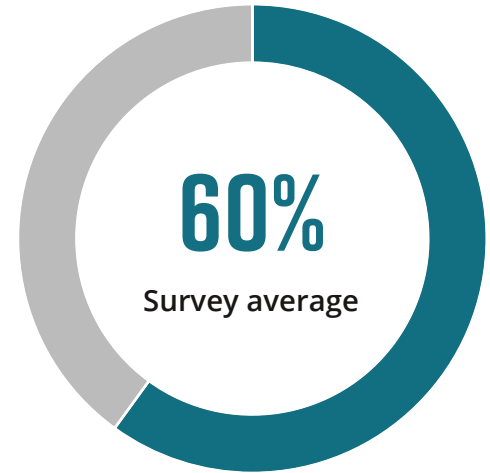
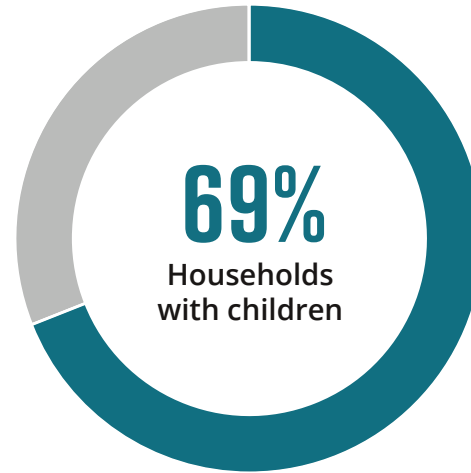
In addition to the generational differences highlighted, families with children under 18 represent a crucial segment. Parents are more eager to modify their behaviour for a future bonus or benefit—82% would be willing to spend more to earn extra loyalty points, compared to 60% of those without children. At the same time, Canadian families over-index in emerging categories, including sustainability.

Nearly two-thirds of families with children have increased their focus on sustainability over the past year, compared to 49% of households without children. Sixty-nine percent of parents say sustainability influences their choice of loyalty provider—13 percentage points higher than households without children.

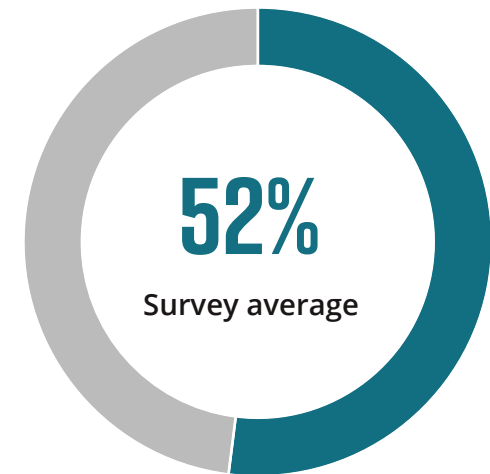
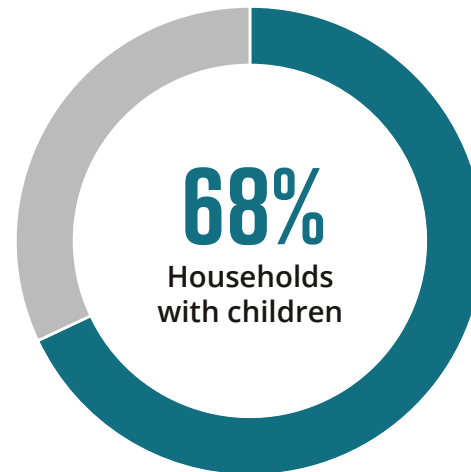
Canadian families also place a high premium on personalization. Of survey respondents, 68% of those with children say receiving personalized offers from their loyalty programs is extremely or very important, compared to 45% of all other respondents. When they receive personalized offers, they prefer vacation packages and bundles—44% of families prefer this offer type compared to 33% of households without children. This suggests that families value the time savings and relevance that personalized offers provide, particularly when considering leisure travel. Of course, affordability is key to this cohort, too: 40% say flexible payment options would influence them to book travel through their loyalty program more frequently.

These insights emphasize the need for loyalty and marketing strategies that cater to distinct audience segments.

I WOULD CHOOSE ONE LOYALTY PROGRAM OVER ANOTHER BECAUSE IT PRIORITIZES SUSTAINABILITY



RECEIVING PERSONALIZED OFFERS FROM MY LOYALTY PROGRAM(S) IS EXTREMELY OR VERY IMPORTANT



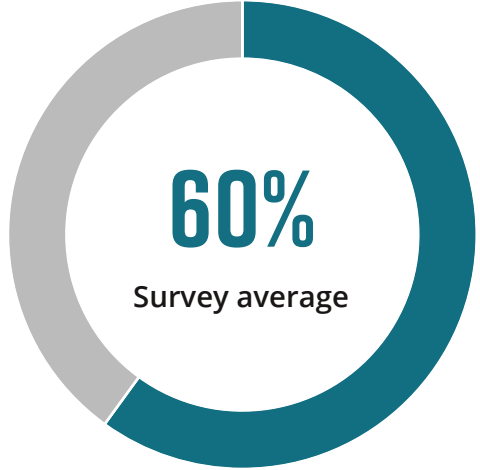
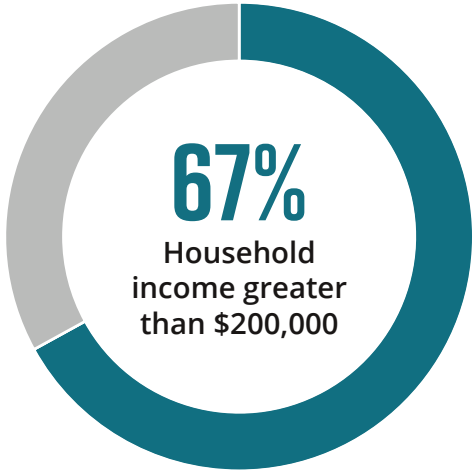
A FOCUS ON CANADA'S HIGH-NET-WORTH INDIVIDUALS

While it may be assumed that high-income individuals have different expectations from their loyalty programs than Canadians in lower income brackets, they remain attuned to value. Among respondents with household incomes exceeding \$200,000, 55% are interested in personalized offers that help them save money, and 38% prioritize cost savings above all else in a travel loyalty program. Many would also book and spend more with their loyalty programs if earning points were easier, reflecting the connection between savings and engagement. At the same time, this group shows a *slight* preference for exclusive travel options, amenities, and benefits, challenging brands and their loyalty programs to strike a balance between exclusivity and value.

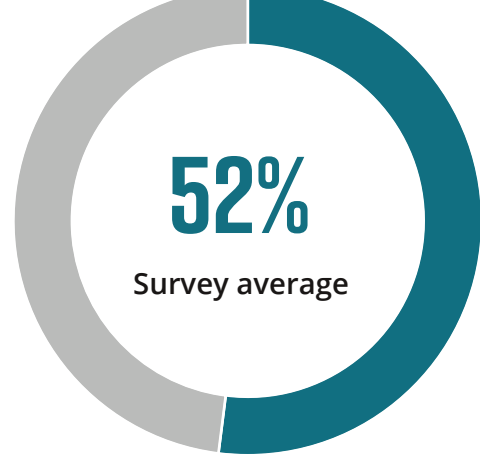
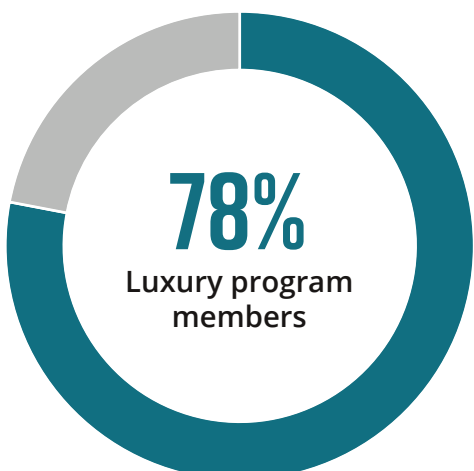
Like families, sustainability is equally important to high-income earners. Two-thirds would choose one loyalty program over another based on its sustainability initiatives, compared to 60% overall. Among consumers who belong to luxury members-only loyalty programs like Founders Club and Inspirato (3% of the respondent pool, and the majority of whom earn more than \$100,000 per year), 72% said that sustainability became more important to them in the past year, compared to 53% of the general population. Notably, 48% would be more likely to book flights through their loyalty programs if options included fuel-efficient routes or sustainable aviation fuels—more than double the Canadian average.

For companies without travel rewards programs, the behaviour of earners in the \$150,000 to \$190,000 bracket makes a strong case for this offering. More than half of respondents in this upper-middle-income group report increased purchases and interactions with brands because of their travel rewards programs, pointing to a clear opportunity to generate incremental revenue and nurture long-term loyalty within this customer segment.

I WOULD CHOOSE ONE LOYALTY PROGRAM OVER ANOTHER BECAUSE IT PRIORITIZES SUSTAINABILITY



RECEIVING PERSONALIZED OFFERS FROM MY LOYALTY PROGRAM(S) IS EXTREMELY OR VERY IMPORTANT



DESIGNING LOYALTY PROGRAMS TO REFLECT CANADIAN VALUES

iSeatz's inaugural Canada-focused loyalty report highlights a mature market with significant potential. Consumers are placing greater emphasis on value-driven rewards that address their practical and everyday needs, while brands are working to meet these expectations. Yet the era of simple "earn and burn" loyalty programs is waning. Canadians now demand tailored, flexible options that fit seamlessly into their lives.

Whether through offering sustainable travel options, implementing flexible payment methods, or curating rewards that appeal to different generational and demographic groups, loyalty programs have a clear roadmap to differentiation and establishing competitive advantage.

Canadian loyalty programs must also address a series of persistent disconnects to better align with consumer expectations. Improving elements of the user experience, especially around the process of booking travel, should be a top priority. Bringing performance metrics more in line with program goals should be a key internal focus area. Creating an agile yet comprehensive rewards portfolio that can engage value-conscious consumers and high-net-worth individuals alike must become their strategic north star.

By embracing these approaches and investing in travel loyalty technology partners that make them possible, Canadian brands will improve engagement and create deeper, longer-lasting connections with their customers. This is how businesses can take full advantage of the potential of the Canadian marketplace.

Be sure to **download** our companion report in this year's Tipping Point series, examining the U.S. travel loyalty market.



***FOR MEDIA AND ANALYSTS SEEKING DEEPER INSIGHTS INTO
OUR SURVEY DATA OR BRANDS LOOKING FOR STRATEGIES
TO MAXIMIZE OPPORTUNITIES IN THE CANADIAN LOYALTY
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