

**Thailand Loyalty Programs Market Intelligence and Future Growth Dynamics - 50+ KPIs on Loyalty Programs Trends by End-Use Sectors, Operational KPIs, Retail Product Dynamics, and Consumer Demographics - Q1 2025 Update**

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**Report description:**

According to PayNXT360, loyalty market in Thailand is expected to grow by 16.3% on annual basis to reach US\$672.8 million in 2025.

In value terms, the loyalty market in the country has recorded a CAGR of 18.3% during 2020-2024. The loyalty market in the country will continue to grow over the forecast period and is expected to record a CAGR of 13.7% during 2025-2029. Loyalty market in the country is expected to increase from US\$578.6 million in 2024 to reach US\$1,124.1 million by 2029.

This report provides a detailed data-centric analysis of the loyalty market opportunities and risks across a range of end-use sectors and market segments in Thailand. With over 50 KPIs at the country level, this report provides a comprehensive understanding of loyalty market dynamics, market size and forecast, and market share statistics.

PayNXT360's research methodology is based on industry best practices. Its unbiased analysis leverages a proprietary analytics platform to offer a detailed view on emerging business and investment market opportunities.

**Key Insights**

Thailand's loyalty landscape is rapidly evolving, driven by digital integration, coalition partnerships, and gamification strategies to enhance customer engagement. The growing adoption of digital wallets, as seen in The Coffee Club Thailand's loyalty app, reflects consumer preferences for seamless, cashless transactions with integrated rewards. Similarly, coalition loyalty programs such as The1 Card by Central Group offer extensive redemption networks, strengthening customer retention through versatile benefits.

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These trends indicate a shift toward convenience-driven and collaborative loyalty initiatives that cater to tech-savvy, value-conscious consumers.

Additionally, the increasing use of data analytics and gamification transforms how Thai businesses interact with customers. Companies like Central Group leverage personalized insights to offer tailored rewards, enhancing engagement and satisfaction. Meanwhile, gamification elements within loyalty programs, such as interactive challenges in The1 app, foster deeper brand connections through engaging user experiences. The expansion of ride-hailing loyalty programs, led by GrabRewards, further highlights the importance of rewarding frequent usage in competitive sectors. As businesses continue investing in innovative, data-driven, and interactive loyalty solutions, Thailand's loyalty ecosystem is poised for sustained growth, offering consumers more rewarding and engaging experiences.

#### Integration of Digital Wallets in Loyalty Programs

- Thai businesses increasingly incorporate digital wallets into their loyalty programs to enhance customer convenience and engagement. For instance, The Coffee Club Thailand offers a digital wallet and loyalty app that allows users to pay instantly at outlets using digital cash or earned loyalty points. Members also receive exclusive offers, birthday privileges, and premium gifts, personalizing the user experience.
- The widespread adoption of smartphones and the growing preference for cashless transactions in Thailand drive this trend. Consumers seek seamless and efficient payment methods that also reward their loyalty.
- The integration of digital wallets in loyalty programs is expected to become more prevalent. Businesses will leverage technology to offer personalized and convenient experiences, thereby increasing customer retention.

#### Expansion of Coalition Loyalty Programs

- Coalition loyalty programs, where multiple businesses collaborate to offer shared rewards, are gaining traction in Thailand. The1 Card by Central Group is a prominent example, partnering with over 1,000 brands and allowing members to earn and redeem points across a wide network of partners.
- Such collaborations enhance the value proposition for customers by providing a broader range of redemption options, thereby increasing the appeal of the loyalty program.
- As businesses recognize the mutual benefits, more coalition programs will likely emerge, offering customers versatile and attractive loyalty options.

#### Adoption of Gamification Strategies

- Thai loyalty programs are increasingly incorporating gamification elements to boost customer engagement. For example, The1 app includes gamification features, such as interactive challenges that reward users with digital badges and points upon completion.
- The desire to make loyalty programs more engaging and fun drives the adoption of gamification. Interactive elements encourage regular participation and foster a deeper connection between the brand and the customer.
- The use of gamification in loyalty programs is expected to grow, with businesses developing more innovative and interactive ways to engage customers and encourage loyalty.

#### Personalization Through Data Analytics

- Thai companies are leveraging data analytics to personalize their loyalty programs. Central Group, for instance, uses customer data to deliver personalized shopping experiences through its loyalty program, The1. By analyzing consumer behavior, they provide tailored offers and recommendations to customers.
- Advancements in data analytics and a better understanding of consumer preferences enable businesses to offer personalized experiences, enhancing customer satisfaction and loyalty.

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- The emphasis on personalization will likely intensify, with companies investing in sophisticated analytics to deliver customized experiences that foster deeper customer loyalty.

#### Growth of Ride-Hailing Loyalty Programs

- Ride-hailing services in Thailand are implementing loyalty programs to encourage repeat usage. Grab's GrabRewards program allows users to earn points across various services, including transport and delivery, which can be redeemed for discounts and other benefits.
- The competitive ride-hailing market and the need to retain customers drive the development of loyalty programs that reward frequent users.
- As the ride-hailing sector grows, loyalty programs are expected to evolve, offering more comprehensive benefits to enhance user satisfaction and loyalty.

#### Competitive Landscape in Thailand's Loyalty Market and Regulatory Changes

Thailand's loyalty program market is evolving rapidly, driven by increasing digital adoption, rising consumer expectations, and competition among retailers, banks, and fintech firms. Major players such as The 1 (Central Group), TrueYou (True Corporation), and PTT Blue Card dominate the space, leveraging their vast networks to offer personalized, multi-brand rewards. As digital wallets and e-commerce platforms gain traction, loyalty programs incorporate AI-driven recommendations, blockchain-based security, and omnichannel experiences to enhance engagement.

The future of Thailand's loyalty market will be shaped by regulatory shifts, digital transformation, and changing consumer preferences. Programs that offer hyper-personalized rewards, integrated mobile experiences, and sustainability incentives will gain a competitive edge. While major retailers and telecom firms leverage their extensive customer bases, new entrants must differentiate through niche offerings, innovative reward structures, and regulatory compliance to compete in this dynamic market.

#### Current State of Thailand's Loyalty Program Market

- Thailand's loyalty market is dominated by major retailers and telecom giants. The 1 (by Central Group) leads in retail, offering members rewards for shopping, dining, travel, and entertainment.
- Telecom companies are leveraging loyalty programs to drive customer retention. TrueYou (True Corporation) provides exclusive benefits such as discounts on shopping, dining, and travel, directly tied to telecom usage.
- PTT Blue Card, a leading fuel-based loyalty program, offers points redeemable for fuel discounts, dining, and travel perks, strengthening its ecosystem beyond fuel stations.
- E-commerce platforms and digital wallets are integrating loyalty offerings with Shopee Coins and Lazada Rewards, allowing users to earn and redeem points across online shopping and partner merchants.
- Banks such as Kasikornbank, SCB, and Bangkok Bank integrate loyalty into their credit card programs, rewarding spending with cashback, travel perks, and retail discounts.

#### Competition Intensity in Thailand's Loyalty Market

- Retail, telecom, and banking sectors compete aggressively to enhance customer engagement. The 1 and TrueYou dominate their respective sectors, while e-commerce players and fintech disrupt traditional loyalty models.
- AI-driven personalization is a key differentiator, with programs like The 1 using customer data to offer targeted promotions and exclusive deals based on purchase behavior.
- Price-conscious Thai consumers push brands to offer instant rewards and flexible redemption options, leading to multi-brand partnerships and real-time rewards. Shopee Coins, for instance, allow users to apply earned coins directly to future purchases,

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increasing usage and engagement.

- Gamification is increasingly used to drive participation, with programs such as Lazada Rewards incorporating daily check-ins, spin-the-wheel bonuses, and referral incentives to keep users engaged.

### Types of Players

- The 1 (Central Group) leads the retail space, with extensive partnerships spanning malls, supermarkets, and lifestyle brands.
- TrueYou and AIS Serenade offer exclusive discounts, VIP experiences, and lifestyle perks to retain telecom customers.
- Kasikornbank, SCB, and Bangkok Bank provide point-based rewards and travel incentives, particularly for high-spending customers.
- Shopee Coins and Lazada Rewards have disrupted traditional loyalty programs by integrating spending-based rewards across shopping, travel, and digital services.
- PTT Blue Card is among the most recognized, offering extensive partner benefits beyond fuel discounts.

### Market Structure

- Retail and telecom giants dominate, benefiting from vast customer networks. Their ability to bundle rewards across multiple categories makes them difficult to challenge.
- New entrants must offer unique value propositions, as existing programs provide comprehensive rewards and seamless user experiences.
- The rise of super apps and fintech disruptors is reshaping the loyalty landscape, as digital wallets such as TrueMoney and Rabbit LINE Pay integrate rewards directly into mobile payments.
- Building a competitive loyalty ecosystem requires significant investment in technology, data security, and partner networks.
- Evolving data privacy regulations require companies to adopt transparent and secure practices, increasing business compliance costs.

### Future Competitive Landscape

- AI and machine learning will drive deeper personalization, with predictive analytics programs offering real-time, behavior-based rewards. The 1 is expected to expand its AI-driven shopping recommendations.
- With cross-industry collaborations creating multi-brand ecosystems for seamless point accumulation and redemption, coalition loyalty models will grow. For instance, Shopee and AirAsia's partnership enhances travel rewards through e-commerce spending.
- Sustainability-focused rewards will gain traction as Thai consumers prioritize ethical consumption. Programs rewarding eco-friendly purchases and carbon offset contributions will attract engagement.
- Regulatory oversight will increase, particularly in data privacy, digital payments, and fair consumer practices, forcing programs to enhance transparency and security.

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