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Conceptual principles of forming innovative loyalty programs in the hotel and restaurant business

The article examines the essence, current trends, and innovative approaches to establishing a loyalty system in the hotel and restaurant industry. It has been proven that loyalty programs are a strategic marketing management tool that helps increase consumer satisfaction, increase the frequency of repeat visits, and ensure competitive advantages for establishments. It is determined that traditional forms of loyalty, particularly bonus, discount, and accumulation programs, are gradually giving way to innovative models that combine digitalization, personalization, gamification, and the integration of cultural and gastronomic elements. The need to implement individualized approaches to building loyalty programs based on the analysis of customer behavioral data, their preferences, and motivational factors is substantiated. Particular attention is paid to the use of CRM systems, mobile applications, and Big Data technologies. It is noted that gamification is an effective method of increasing customer interest in interacting with the brand, creating a positive emotional experience, and contributing to long-term commitment to the establishment. The study presents a model for the formation and cyclical management of an innovative loyalty ecosystem, which includes four main stages: market research, goal setting and positioning, strategy and tactics development, and implementation and effectiveness monitoring. The analysis of the main types of loyalty programs enabled us to identify their advantages and disadvantages, as well as to propose a combined model as the most effective for modern conditions in the restaurant business. It was found that the effectiveness of loyalty programs largely depends on the level of staff training, the corporate culture of the institution, service standardization, and a systematic approach to managing customer experiences.

Keywords: loyalty system; hotel and restaurant business; innovative programs; personalization; gamification; digital technologies; CRM systems; customer experience.

Relevance of the topic. The modern hotel and restaurant business operates in an «experience economy» where consumers choose not just a service, but a comprehensive, personalized experience. Globalization, digitalization, and market saturation have led to a significant increase in the cost of acquiring new customers (CAC) and a reduction in their lifetime value (LTV) due to the ease of switching to competitors. In this context, sustainable customer loyalty is transforming from a marketing tool into a key strategic asset for a company.

The problem is that most existing loyalty programs in the hotel and restaurant industries are stuck in a «last century» paradigm: they primarily consist of direct discounts, loyalty points, and standardized offers. Such mechanisms are easy to imitate, quickly lose their value in the eyes of consumers seeking uniqueness and recognition, and are unable to foster deep emotional loyalty. This creates a systemic gap: businesses cannot effectively retain visitors using outdated tools in an environment that requires an innovative, technologically integrated, and deeply personalized approach.

The scientific underdevelopment of the topic stems from the insufficient conceptualization of the concept of an «innovative loyalty program» within the specific context of the hotel and restaurant business. The following aspects require thorough theoretical justification: the absence of a generally accepted classification of innovative models and their structural elements; the need to develop a theoretical and methodological framework for program design based on the principles of customer-centric design and the integration of artificial intelligence (AI) technologies for behavior prediction and hyper-personalization of offers; the need to develop a comprehensive system of metrics (in addition to traditional checks and visit frequency) that would reflect the economic effect of emotional loyalty and the impact of innovation on the brand equity of the enterprise.

Solving this scientific problem is directly related to achieving several critical practical tasks for hotel and restaurant businesses: the introduction of innovative programs using CRM, mobile applications, and Big Data allows for the automation of communications, reduction of operational costs for manual loyalty maintenance, and more accurate targeting of marketing budgets; innovations in loyalty create barriers to customer migration and form a non-price competitive advantage that is more sustainable than simply lowering prices; Programs that encourage feedback and turn customers into brand advocates promote organic growth and enhance reputation in

an environment where consumer trust in traditional advertising is declining. Having a strong, loyal customer base is a critical buffer that ensures stable demand and faster business recovery after economic downturns. Having a strong, loyal customer base is a crucial buffer that ensures stable demand and faster business recovery after economic downturns or crises. That is why researching the conceptual foundations for developing innovative loyalty programs is a strategically important task aimed at ensuring the adaptability, sustainability, and creative development of the hotel and restaurant business in conditions of constant economic and technological turbulence.

Analysis of recent research and publications. Recent studies on the hotel and restaurant business have focused on the development of innovative approaches to loyalty programs, the utilization of digital technologies, and personalized marketing. Recent studies (O.V. Albeschenko, N.V. Rogova, O.M. Onishchenko [1]; T.E. Veselovskaya [2]; V.K. Goy [3]; Z.B. Zhivko, M.E. Stadnik [4]; A.Mokra [5]; S.E. Ramenska, A.R. Chernyavska, N.V. Kotovska [6]; O.Svitlynets, P.Gorishevsky, Yu.Khalilova-Chuvayeva [7]; O.Z. Ugolkova [8], S.E. Khrupkov, N.R. Ivanechko [9], Z.Yurinec, B.Baida, Yu.Biryukova [10], O.Yarmolyuk, Yu.Fisun, A.Shapovalova [11]) show that the integration of digital platforms, mobile applications, and social networks allows for the effective creation of individualized offers for customers and increases their loyalty.

The authors emphasize the importance of flexible programs that take into account external factors, economic fluctuations, and cultural characteristics of consumers, as well as the use of gamification and non-standard rewards to increase customer interest. A review of the literature reveals that modern loyalty programs are primarily focused on integrating marketing tools, personalizing service, and utilizing Big Data to predict consumer behavior. However, a comprehensive assessment of the impact of such programs on long-term customer loyalty has not yet been thoroughly researched. In addition, questions remain open regarding the effectiveness of different types of rewards, the relationship between digital strategies and emotional customer loyalty, and the adaptation of loyalty programs to changing market conditions, which determines the prospects for further scientific research in this area.

Identification of previously unresolved parts of the general problem. Despite numerous studies in the field of hotel and restaurant business marketing and loyalty system development, several issues remain understudied. In particular, most scientific works focus on classic loyalty programs and the assessment of their economic efficiency, while modern, innovative approaches, such as personalization of offers, gamification, digital platforms, and the integration of loyalty programs into comprehensive marketing strategies of establishments, are not sufficiently considered. The extensive impact of innovative loyalty programs on the competitiveness of establishments and consumer behavior in the long term has also not been studied. In particular, the issues of effectively combining economic feasibility, customer engagement, and increasing customer loyalty remain open. In addition, the role of integrating digital technologies, mobile applications, and online services in forming loyalty programs, as well as their impact on personalizing services and increasing customer interaction, has been studied to a limited extent.

Formulation of the article's objectives. The purpose of the article is to study the conceptual foundations of the formation of innovative loyalty programs in hotel and restaurant businesses and to determine their impact on increasing the competitiveness and efficiency of enterprises.

Presentation of the primary material. The loyalty system is a key tool in the marketing strategy of the hotel and restaurant business, aimed at forming long-term relationships with consumers, increasing repeat sales, and boosting the average check. Traditional loyalty programs involve the accrual of bonuses, discounts, or participation in cumulative systems; however, modern market conditions require the introduction of innovative approaches that enhance the effectiveness of such systems.

Innovative loyalty programs differ from traditional ones primarily in the personalization of offers based on the analysis of customer behavior data, their preferences, and purchase history. The use of digital technologies, mobile applications, and integrated CRM systems enables targeted influence on the customer audience, creating a sense of individualized approach [1].

In addition to personalization, incorporating gamification elements into loyalty programs is also relevant, as they motivate consumers to engage actively with the brand. For example, participation in themed quests, accumulating points for performing specific actions, or participating in rating systems stimulates repeat visits to the establishment and increases customer interest.

Integrating cultural and gastronomic activities into loyalty programs is another innovative direction. Organizing tastings, master classes, gastronomic festivals, or cultural events not only increases the establishment's revenue but also helps create a unique brand that enhances the emotional value of the consumer experience. This approach creates additional incentives for repeat visits and recommendations among potential customers.

The effectiveness of innovative loyalty programs also depends on the proper organization of the establishment's internal processes, in particular, staff training, service standardization, and the use of analytical tools to monitor customer behavior. The application of these approaches allows hotel and restaurant businesses not only to increase economic efficiency but also to strengthen their competitive position in the market.

A crucial aspect is adapting loyalty programs to the specific needs of the target audience and customer segmentation. From a haute cuisine establishment to a gastropub or café, each format requires an individual

approach to creating incentives for loyalty, which allows you to optimize resources and increase the return on the program.

In general, current trends in the development of the hotel and restaurant business require a comprehensive combination of digital technologies, personalization, gamification, and the integration of cultural and gastronomic elements to form effective and innovative loyalty programs that contribute to diversifying income and increasing the competitiveness of establishments. First, it is worth noting that loyalty programs play a crucial role in shaping the competitiveness of restaurant businesses, enabling them to establish a strong market presence. At the same time, the lack of a systematic approach to developing and implementing loyalty tools often leads to economic losses; therefore, the effective creation and implementation of loyalty programs are one of the determining factors for the successful operation of establishments [2].

Loyalty programs encompass marketing strategies designed to encourage and reward customers for their repeated interactions with a brand or company. They are implemented through the provision of various privileges, discounts, bonuses, and other benefits that encourage continued use of goods or services. The primary objective of such programs is to foster long-term relationships between the establishment and consumers by creating added value that contributes to increased loyalty and active engagement with the brand [3].

The development of loyalty programs requires a comprehensive approach that covers various aspects of restaurant operations. One of the key factors is corporate culture, as it determines the quality of service and products. Staff need to recognize the importance of their contributions to the overall level of service, which directly impacts the effectiveness of loyalty programs and customers' perception of the establishment's value.

Developing an effective loyalty system requires a thorough analysis of consumer preferences and expectations. To this end, it is advisable to use methods of collecting information, in particular, customer surveys and analysis of establishment attendance. The primary goal of a loyalty program is to maintain a stable level of attendance, which is achieved through various approaches to interacting with guests. In particular, there are bonus and discount programs, each with its own advantages, depending on the marketing strategy of the enterprise.

Relationship marketing and the concept of consumer loyalty management are considered essential tools for maintaining an establishment's competitiveness. As part of the study, a marketing strategy algorithm was developed that includes defining the mission, vision, and values of the enterprise.

Understanding consumer motivation and decision-making processes is crucial to the effective operation of the restaurant business. A comprehensive analysis of the restaurant product, combining product quality, material and technical support, and service level, allows you to identify the key factors in building customer loyalty.

Thus, loyalty programs are an integral part of customer relationship management in the restaurant business. Their planning, implementation, and support require significant financial investments, which makes it necessary to consider them in the context of the company's long-term marketing strategy [4].

In line with this statement, Figure 1 presents a detailed algorithm for developing a marketing strategy that aims not only to attract new customers but also, more importantly, to build and strengthen their loyalty. This algorithm will likely encompass sequential steps, from the initial analysis of the market and target audience to the implementation of specific marketing tools and their subsequent evaluation, with an emphasis on factors that contribute to long-term relationships with consumers.

Figure 1 illustrates a model for the formation and cyclical management of an innovative loyalty ecosystem in the hotel and restaurant business. The model is structured as a cycle of four consecutive stages that are interrelated, providing a comprehensive approach to the development of innovation in the hospitality industry.

Research and analysis are the initial stages, which include analyzing the current state of the restaurant services market, segmenting the target audience, and defining the consumer profile.

This enables you to establish a foundation for informed marketing decisions. Goals and positioning – at this stage, SMART goals are defined, a unique value proposition (UVP) is developed, and brand positioning is implemented. This forms the strategic basis for building the establishment's competitive advantages [5].

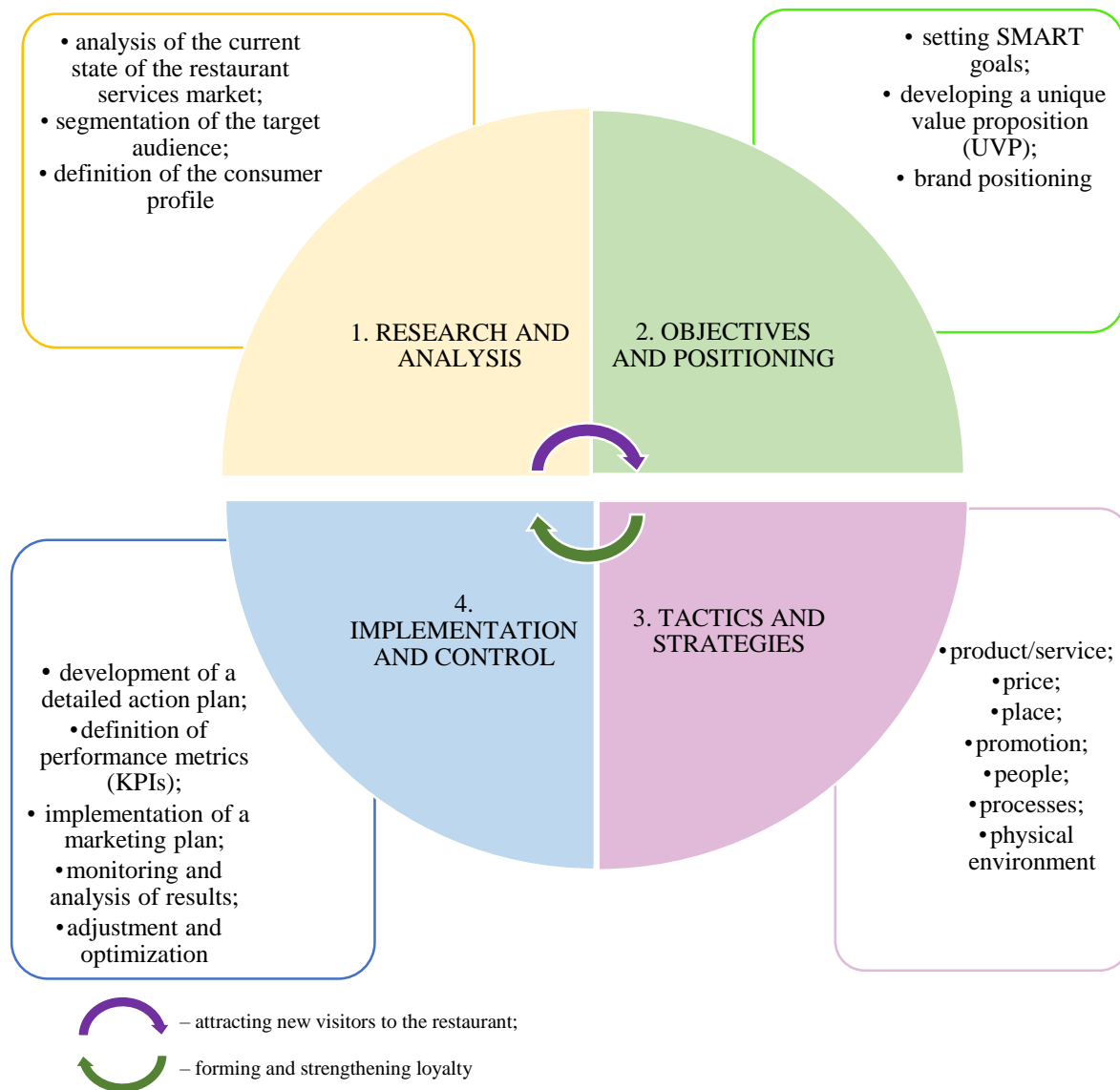


Fig. 1. Model of formation and cyclical management of an innovative loyalty ecosystem in the hotel and restaurant business

Tactics and strategies – the stage of implementing the marketing mix (product, price, place, promotion, people, process, physical evidence), which covers all key elements of service management and customer communications. Implementation and control – involves developing a detailed action plan, defining key performance indicators (KPIs), implementing a marketing plan, monitoring results, and adjusting and optimizing processes [6].

The overall cycle of the model is designed to attract new visitors, foster and strengthen their loyalty, and enhance the efficiency of the innovation process management in restaurant establishments. Thus, the presented model reflects a systematic approach to developing innovative loyalty, where each stage is an integral part of a continuous process of improving the service and competitiveness of the establishment.

A logical extension of this concept is the recognition of the role of loyalty programs, which are becoming particularly important in today's business environment due to several factors:

1. Customer retention. They help reduce customer churn through a rewards system that encourages them to continue working with the brand and make repeat purchases;

2. Increased engagement. Through personalized offers, special discounts, and exclusive communication strategies, companies can enhance the emotional attachment of consumers, which has a positive impact on their interaction with the brand;

3. Analysis of consumer behavior. Loyalty programs allow companies to collect and analyze data on customer preferences, purchasing behavior, and demographic characteristics. The information obtained can be used to improve marketing strategies, expand product offerings, and enhance overall service levels;

4. Competitive advantage. In a dynamic market environment, having an effective loyalty program can be a crucial factor in helping a company differentiate itself from its competitors, attract new customers, and motivate existing customers to continue doing business with the company;

5. Referral-based marketing. Satisfied customers with a high level of loyalty are more likely to recommend the brand to their friends and share their positive experiences on social media. Programs that offer rewards for referrals can further encourage the spread of information about the brand;

6. Increased profitability. The use of incentives, such as bonus points, discounts, or exclusive access to products, motivates consumers to make more frequent or higher-value purchases, which has a positive impact on the company's financial performance [7];

7. Building brand trust. Systematically providing customers with valuable offers and rewards helps build confidence and foster long-term brand loyalty, which is a crucial factor in maintaining the company's competitiveness.

In general, loyalty programs are an effective tool for attracting and retaining customers in today's competitive environment. Focusing on increasing customer satisfaction, personalizing marketing strategies, and creating added value contributes to stable business growth and the formation of lasting relationships with products and services.

Customer loyalty is a crucial factor in ensuring stable business operations, profitability, dynamic growth, and a strengthened brand reputation. In essence, it is the lasting commitment of customers to a particular company or brand that goes beyond one-time transactions and is based on trust, satisfaction, and shared values. In a highly competitive market where consumers have a wide range of alternative offers to choose from, building a stable base of loyal customers is particularly important.

One of the key advantages of customer loyalty is ensuring a stable income for the company. Unlike consumers who make purchases sporadically or are influenced by competitive offers, loyal customers tend to make repeat purchases, which contributes to financial predictability and stability of cash flow. This, in turn, guarantees long-term business viability [8].

Additionally, consumer loyalty shields the company from competitive pressure. In a saturated market, companies with a loyal customer base gain a strategic advantage because their consumers are less susceptible to changes caused by price fluctuations or competitors' marketing campaigns. Customers' decisions regarding the choice of goods or services are primarily determined by product quality, brand reputation, and emotional attachment, which significantly weakens the influence of external market factors.

Another important aspect of loyalty is the high level of consumer interaction with the brand. Loyal customers actively communicate with the company through social networks, support services, and other channels, providing feedback that helps improve the quality of products and services. In addition, thanks to the «word of mouth» effect, they act as informal brand ambassadors, expanding the reach of the company's marketing efforts and attracting new consumers [9].

The implementation of effective loyalty programs helps to create a sense of community among customers, strengthening their emotional connection to the brand and increasing their level of loyalty. Such interaction not only improves the consumer experience but also contributes to long-term customer retention, which in turn increases the company's competitiveness.

Loyalty programs, despite having both advantages and disadvantages, can be categorized into different types (table 1), each of which is tailored to specific business goals, target audience characteristics, and industry-specific developments. An important aspect is selecting a program that aligns with the strategic objectives of the enterprise, takes into account the characteristics of consumer behavior, and responds to market trends, while also contributing to the creation of added value and motivational incentives for customers [10]. By analyzing the advantages and limitations of different types of loyalty programs, companies can make informed decisions about their development and implementation, which will help increase consumer engagement, enhance customer satisfaction, and retain their customer base in the long term.

Table 1 summarizes the main types of loyalty programs used in the restaurant industry and highlights their key advantages and disadvantages, enabling you to determine the optimal format for interacting with consumers. The points-based loyalty program is the most common model, based on accumulating and exchanging points for rewards. Its advantage is flexibility and the ability to create multi-level incentive schemes, but it requires significant organizational effort and can lose effectiveness due to the devaluation of points. A multi-level program enables you to structure your customer base and create a sense of prestige and exclusivity; however, it is also challenging to administer and may raise concerns among consumers who do not reach the higher levels. Cashback programs offer transparency and a quick sense of benefit, which increases customer loyalty, but reduces the enterprise's profitability due to pressure on margins. Stamp programs are the easiest to implement and effective for local establishments; however, they have limited scalability and a risk of abuse. Subscription models provide a stable income and foster long-term customer loyalty, but require constant updates to offers to avoid «subscription fatigue». Coalition programs form partnership networks of establishments, creating a win-win effect for businesses and customers, but are complicated by the need for coordination between participants [11]. Gamified programs are a modern tool that combines entertainment and motivation. They encourage active customer participation and

increase engagement, but require constant updates and a creative approach to maintaining interest. Therefore, the analysis reveals that the most effective model is a combined one that incorporates elements of several types of programs, in particular, a points system, gamification, and personalized rewards, which aligns with the current expectations of Generation Z consumers and fosters the development of lasting brand loyalty.

Table 1

Main types of loyalty programs, their strengths and weaknesses

Type of loyalty program	Essence	Advantages	Disadvantages
Ball	Accumulation of points and their exchange for rewards	Flexibility, multi-level rewards, data collection	Complexity for businesses and consumers, devaluation of points
Multi-level	Distribution of program members and rewards at the level	Visible goals, exclusive benefits, retention	Complexity, concerns about exclusivity, maintaining levels
Cashback	Return of a certain percentage of money from purchase costs	Tangible rewards, transparency, price attractiveness	Pressure on margins, expected value, redemption restrictions
Stamps	Collection of stamps and their exchange for rewards	Simplicity, customer loyalty, appeal to locals	Limited scalability, risk of fraud, environmental impact
Subscription	Prepayment of rewards	Predictable income, customer retention, premium services	Customer fatigue, perception of value, risk of churn
Coalitions	Coverage of several enterprises in one program	Network effect, diverse rewards, cross-promotion	Complexity, coordination issues, concerns about competition
Gamification	Introduction of game mechanics to attract	Engagement and fun, influence on customer behavior, virality	Need for constant updates, exclusivity, excessive complexity

Conclusions and prospects for further research in this area. The study confirmed that the loyalty system is one of the most essential tools of the marketing strategy of hotel and restaurant businesses, aimed at forming long-term relationships with consumers, increasing customer satisfaction, and ensuring the stable development of the enterprise. It has been established that traditional loyalty models (bonus, discount, multi-level) are gradually losing their effectiveness due to changes in consumer behavior; therefore, it is relevant to transition to innovative formats that combine personalization, gamification, and digital technologies.

Digital tools such as Customer Data Platforms (CDPs), Customer Relationship Management (CRM) systems, and marketing automation platforms play a crucial role in supporting the execution of omnichannel strategies. These technologies enable businesses to consolidate and analyze customer data, track interactions in real-time, and automate personalized engagement, ultimately driving more effective marketing efforts [12].

The analysis has determined that an effective loyalty program should be based on a deep understanding of customer needs and motivations, the integration of CRM systems, the collection and analysis of consumer behavior data, and the creation of an emotional attachment to the brand through cultural and gastronomic events, as well as unique services. These approaches ensure the growth of the establishment's competitiveness, an increase in the average check, and the formation of a positive image. The study's results enable us to conclude that the most effective model is a combined loyalty program that incorporates elements of a points system, gamification, and personalized offers. This format not only contributes to economic benefits but also fosters emotional attachment among customers, which is a strategic advantage for businesses in a highly competitive environment.

Prospects for further research in this area include: studying the impact of artificial intelligence and big data analytics on the development of personalized loyalty programs; examining the effectiveness of gamification mechanisms in various segments of the hotel and restaurant market; developing models of integrated multi-channel loyalty systems that combine online and offline communications; assessing the socio-psychological impact of loyalty programs on consumer behavior and their level of emotional attachment; adapting international experience in customer loyalty management to Ukrainian realities, taking into account the cultural, economic, and behavioral characteristics of consumers.

Under the current conditions of digital technology development in Ukraine, innovative tools such as virtual and augmented reality and artificial intelligence systems are being actively introduced [13].

Thus, further scientific research should focus on enhancing the tools of digital interaction with consumers, developing integrated loyalty management models, and evaluating their impact on the economic performance of hotel and restaurant businesses.

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Концептуальні засади формування інноваційних програм лояльності у сфері готельно-ресторанного бізнесу

У статті розглядаються суть, сучасні тенденції та інноваційні підходи до формування системи лояльності в готельному та ресторанному бізнесі. Доведено, що програми лояльності є стратегічним інструментом маркетингового менеджменту, який сприяє підвищенню задоволеності споживачів, збільшенню частоти повторних відвідувань та забезпеченню конкурентних переваг закладів. Визначено, що традиційні форми лояльності, зокрема бонусні, дисконтні та накопичувальні програми, поступово поступаються місцем інноваційним моделям, що поєднують цифровізацію, персоналізацію, гейміфікацію та інтеграцію культурних і гастрономічних елементів. Обґрунтовано необхідність впровадження індивідуалізованих підходів до побудови програм лояльності на основі аналізу даних про поведінку клієнтів, їхні вподобання та мотиваційні чинники. Особлива увага приділяється використанню CRM-систем, мобільних додатків та технологій Big Data. Зазначається, що гейміфікація є ефективним методом підвищення інтересу клієнтів до взаємодії з брендом, створення позитивного емоційного досвіду та сприяння довгостроковій відданості закладу. У дослідженні представлено модель формування та циклічного управління інноваційною екосистемою лояльності, яка включає чотири основні етапи: дослідження ринку, визначення цілей та позиціонування, розробка стратегії та тактики, а також впровадження та моніторинг ефективності. Аналіз основних типів програм лояльності дозволив виявити їхні переваги та недоліки, а також запропонувати комбіновану модель як найбільш ефективну для сучасних умов розвитку ресторанного бізнесу. Було встановлено, що ефективність програм лояльності значною мірою залежить від рівня підготовки персоналу, корпоративної культури закладу, стандартизації обслуговування та системного підходу до управління клієнтським досвідом.

Ключові слова: система лояльності; готельний та ресторанний бізнес; інноваційні програми; персоналізація; гейміфікація; цифрові технології; CRM-системи; клієнтський досвід.

The article was sent to the editorial board on 15.10.2025.