B2B Buyer Loyalty Index 2025

Reimagining Buyer Relationships
to Unlock Loyalty-Led Growth

SAP Emarsys

BLI

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Introduction

"

Loyalty isn't a program, a department, or a quick win. Loyalty is earned or lost every single time a customer interacts with your brand. Today, B2B buyers are increasingly behaving like consumers. At their core, both True Loyalty in B2C and Strategic Loyalty in B2B are built on the same foundation: **relevance, trust, and value.**
From the first click to the final decision, seamless, personalized experiences turn casual buyers into lifelong advocates.

Today loyalty must evolve from a siloed initiative to a strategic, enterprise-wide business process. SAP helps businesses build trust and drive growth by connecting data, personalizing interactions,

Jessica Keehn,
Chief Marketing Officer,
SAP Customer Experience

and aligning customer experience with core operations. In this global report, you'll uncover trends and insights about the importance of loyalty-led growth: where brands design customer experiences starting with the desired outcome in mind and where customers and brands thrive together. Every customer interaction is a chance to build trust and make growth a predictable outcome. "
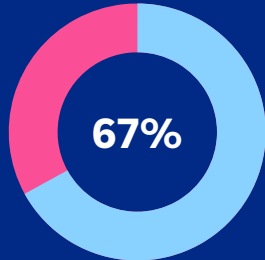
Key Findings

90%
of organizations
have become more loyal toward a supplier during the last 12 months

95%
of buyers
say a supplier's use of AI positively impacts their organization's loyalty

67%
of buyers have switched from a supplier due to a lack of innovation

35%
of organizations have enhanced data sharing or system capabilities to evaluate the success of loyalty programs

B2B Buyer Loyalty

What is B2B Buyer Loyalty?

The SAP B2B Buyer Loyalty Index (BLI) builds on the foundation of the Customer Loyalty Index (CLI), which launched five years ago. Together, these global reports provide a clear, actionable framework for understanding and driving loyalty across both consumer and business buying journeys.

BLI

B2B Buyer Loyalty Index

Translates the complex decision-making dynamics of B2B buyers where loyalty is shaped by strategic alignment, operational efficiency, and long-term value.
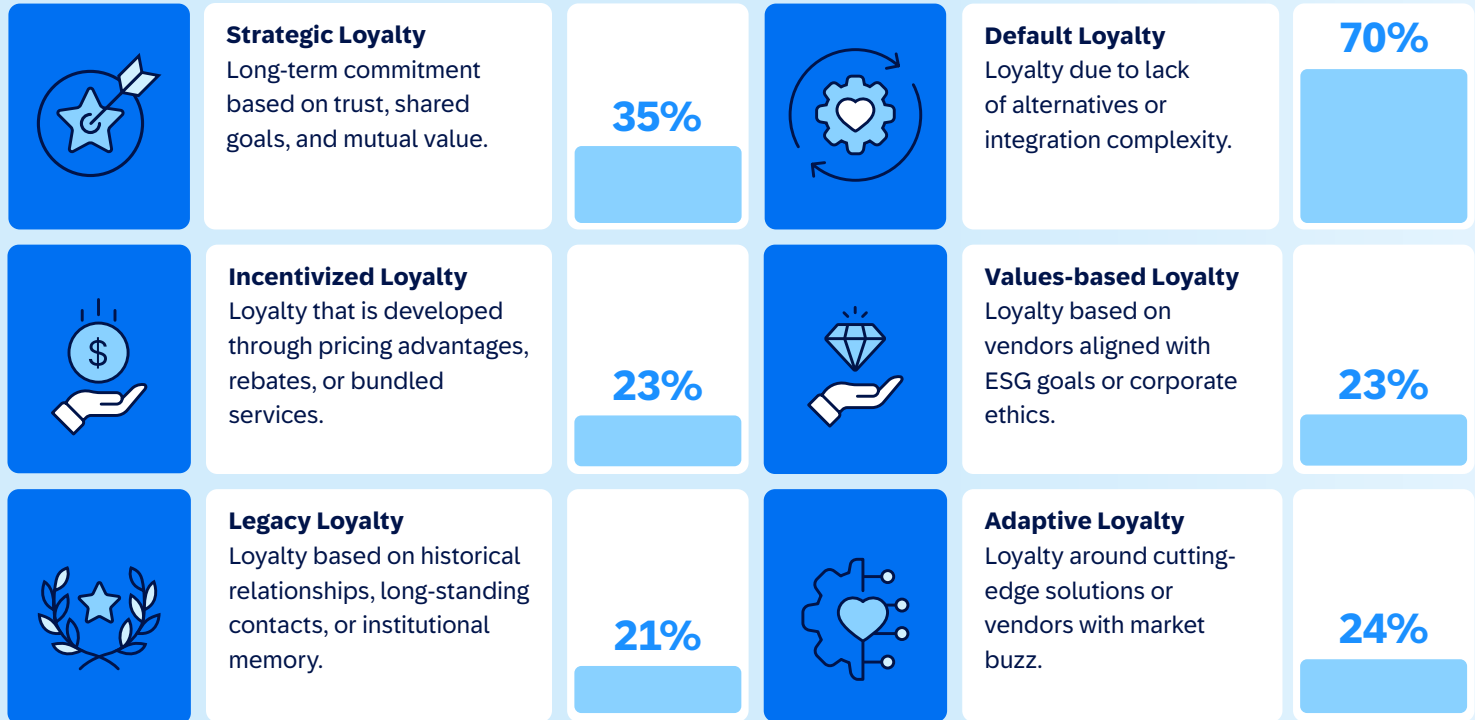
CLI

Customer Loyalty Index

Explores the emotional, ethical, and behavioral drivers of customer commitment. **Explore the CLI trends here**

In 2025, our research suggests that loyalty across B2B and B2C is fragile and fleeting. Even the most loyal buyers will switch quickly when service, cost, or values misalign. This reinforces the need for customer-centric strategies that prioritize relevance, personalization, and seamless experiences.

The Six Types of B2B Buyer Loyalty

In 2025, we uncovered six distinct types of loyalty shaping how B2B buyers engage and commit to their suppliers—based on survey responses from buyers who identified with each type.

Strategic Loyalty
Long-term commitment based on trust, shared goals, and mutual value.

35%

Default Loyalty
Loyalty due to lack of alternatives or integration complexity.

70%

Incentivized Loyalty
Loyalty that is developed through pricing advantages, rebates, or bundled services.

23%

Values-based Loyalty
Loyalty based on vendors aligned with ESG goals or corporate ethics.

23%

Legacy Loyalty
Loyalty based on historical relationships, long-standing contacts, or institutional memory.

21%

Adaptive Loyalty
Loyalty around cutting-edge solutions or vendors with market buzz.

**24%**

B2B Buyer Loyalty in 2025

Business relationships have evolved in complexity and strategic importance, especially as business uncertainty looms. Loyalty is no longer a short-term tactic or passive outcome. Whether you're a brand or a business partner, loyalty is earned through consistency, empathy, and meaningful experiences.
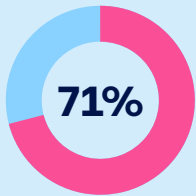
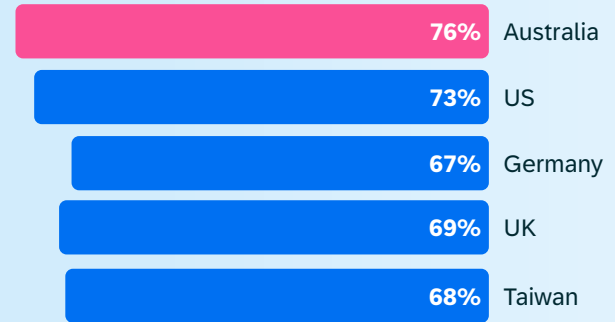**71%** of buyers are loyal to at least one supplier
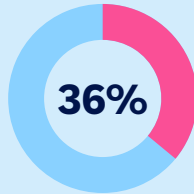
36% of buyers work with a supplier for an average of 3-5 years
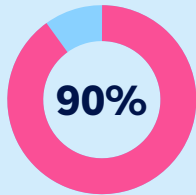
90% of organizations say they have become more loyal toward a supplier during the last 12 months

Loyalty Levels Across Regions, 2025

Region	Percentage
Australia	76%
US	73%
Germany	67%
UK	69%
Taiwan	68%

♡ **Loyalty Lever**

You need rich data and insights about your customers to know what matters most to them. Empower your teams with real-time insights that help them build customer relationships and seize opportunities.

Molton Brown Loyalty Story

How Molton Brown Enhances Customer Loyalty

Traditionally, luxury brands measured customer loyalty through transactions, such as points and purchases. Molton Brown has evolved this into an experiential model by using SAP CX to reach end-consumers and buyers alike.

> At Molton Brown, we're exploring how digital tools can enhance discovery and personalization for our customers. Initiatives such as exclusive previews, tailored content, and our Fragrance Finder help inspire customers online while connecting back into a more connected customer view.
>
> This means when customers visit a boutique, associates are better informed about their preferences and can provide more relevant advice. Our focus is on using AI and data to guide discovery in ways that feel authentic, personal, and true to our heritage.

Read more

MOLTON BROWN
LONDON

Naresh Krishnamurthy,
Senior Business Relationship Manager, Global Cosmetics, Molton Brown, Kao Corporation
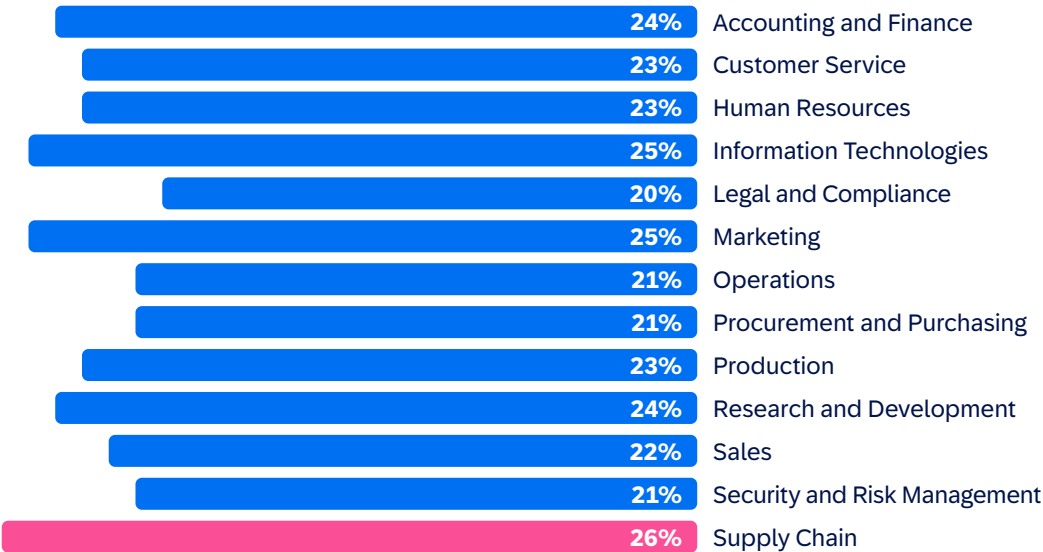
B2B Buyer Loyalty Overview

Department Breakdown of B2B Buyer Loyalty

In 2025, B2B buyer loyalty touches nearly every corner of the organization, with **no single department dominating the landscape.** This finding underscores the need for unified strategies that span across departments to drive collective loyalty.

Departments Most Impacted by Supplier Loyalty

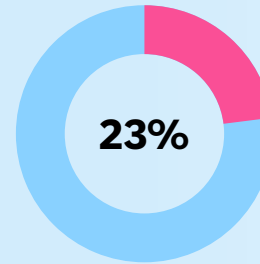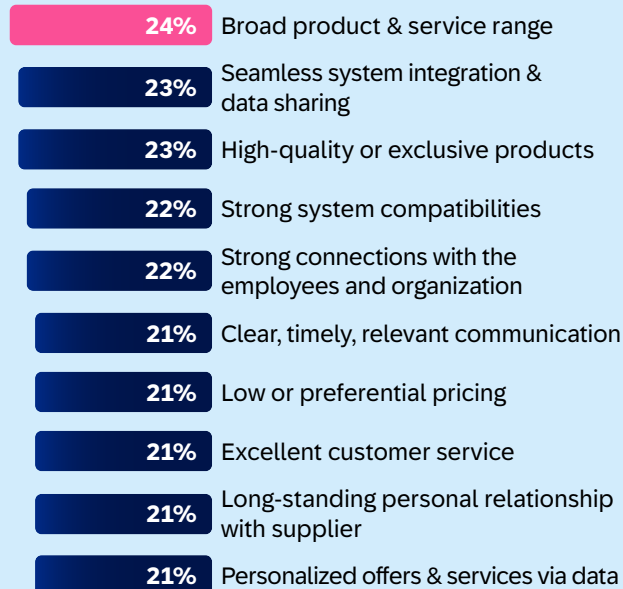| Percentage	Department
24%	Accounting and Finance
23%	Customer Service
23%	Human Resources
25%	Information Technologies
20%	Legal and Compliance
25%	Marketing
21%	Operations
21%	Procurement and Purchasing
23%	Production
24%	Research and Development
22%	Sales
21%	Security and Risk Management
26%	Supply Chain

Top Reasons B2B Buyers Stay Loyal

Price and reputation play a role, but it's clear that functionality, compatibility, and strong personal relationships are the real drivers of long-term loyalty. Suppliers who combine technical excellence with human connection stand out.

Why are B2B buyers loyal?

- **24%** Broad product & service range
- **23%** Seamless system integration & data sharing
- **23%** High-quality or exclusive products
- **22%** Strong system compatibilities
- **22%** Strong connections with the employees and organization
- **21%** Clear, timely, relevant communication
- **21%** Low or preferential pricing
- **21%** Excellent customer service
- **21%** Long-standing personal relationship with supplier
- **21%** Personalized offers & services via data

23%

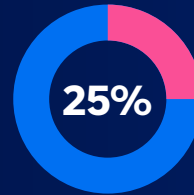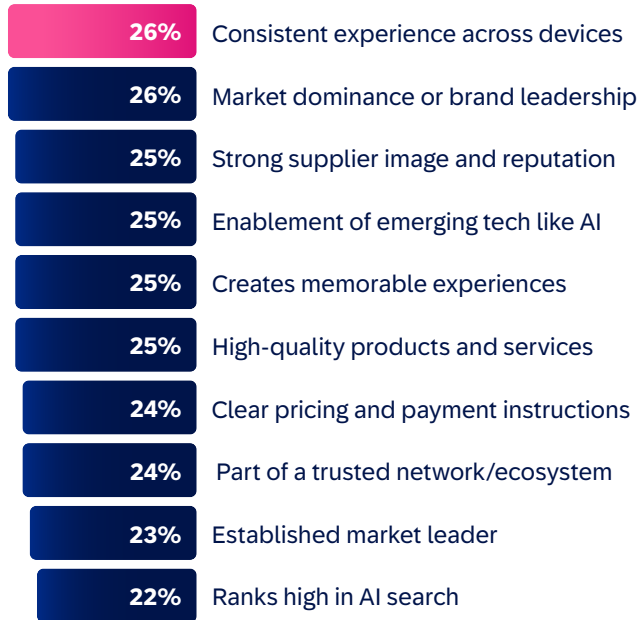**of buyers** are loyal to suppliers who integrate seamlessly with systems and enable data sharing

♡ Loyalty Lever

Put the customer at the center of your business. Accelerate your growth with AI-powered solutions that help you anticipate customer needs and adapt to market uncertainty.
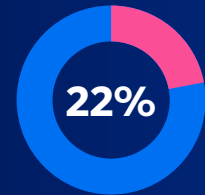
The Loyalty Landscape: What Matters Most to B2B Buyers in 2025

What most positively impacts loyalty?

%	Factor
26%	Consistent experience across devices
26%	Market dominance or brand leadership
25%	Strong supplier image and reputation
25%	Enablement of emerging tech like AI
25%	Creates memorable experiences
25%	High-quality products and services
24%	Clear pricing and payment instructions
24%	Part of a trusted network/ecosystem
23%	Established market leader
22%	Ranks high in AI search

25%

of buyers are loyal to providers with emerging tech like AI

22%

of buyers are loyal to providers who appear highly in AI search

♡ **Loyalty Lever**

Improve customer loyalty by using CX solutions that help you speed up resolution times, deliver more relevant recommendations and provide seamless experiences across marketing, sales, service and commerce touchpoints.

Loyalty Dealbreakers: What Turns B2B Buyers Away?

B2B Buyers are most likely to lose loyalty when suppliers create inconsistent experiences, push unnecessary purchases, or make it difficult to connect with real people.

What factors most often cause buyers to lose loyalty?

28%	Disconnected experiences across touchpoints
27%	Pushing un-required products or services
26%	Making it hard to speak to a human
25%	Taking stances mis-aligned with company values
25%	Being involved in or responsible for a data breach
23%	Failing to take sustainability efforts seriously
23%	Decreasing product quality
23%	Increasing prices
23%	Conducting false advertising
23%	Refusing refunds or compensation
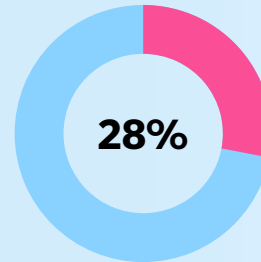
28%

of buyers say a disjointed buying experience negatively impacts their loyalty
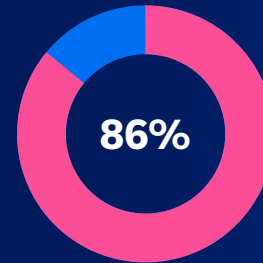
♡ **Loyalty Lever**

Bring your data and channels together to create truly personalized customer experiences. You'll strengthen loyalty by building trust through transparency and consistency.

Signals of Loyalty: Why B2B Buyers Stay Committed

B2B Buyers express loyalty through collaboration, advocacy, and strategic alignment. This highlights the **importance of building Strategic Loyalty,** which is built on trust, shared experiences, and mutual engagement.

How do you show loyalty to your favorite suppliers?

- **33%** Collaborate with them
- **32%** Extend invitations to events, dinners or conferences
- **32%** Use their products over superior alternatives
- **31%** Add them to our preferred supplier list
- **31%** Share our data with them
- **31%** Join their loyalty or incentive programs
- **30%** Recommend them to other industry players
- **30%** Attend their events and conferences
- **30%** Buy from them—even at a premium price
- **30%** Engage with their online content

86%

of organizations are more likely to allocate budget to a supplier if there's an existing strategic partnership or participation in a supplier loyalty or incentive program.

♡ Loyalty Lever

Deploy a CRM that helps you stay ahead by managing accounts proactively. When you bring together your marketing, commerce, and sales data, it's easier to collaborate with customers and deliver more meaningful interactions.

The Value Exchange: Loyalty Expectations

Relevance and personalization are key in B2B. When customers feel like they're getting VIP treatment or insider access, it strengthens loyalty and deepens trust.

What do organizations expect in exchange for their loyalty?

28%	Fit-for-purpose recommendations
27%	Direct access to senior leaders or experts
27%	Personalized and tailored deals
27%	Exceptional customer service
27%	Seamless employee interactions
25%	Loyalty points or rebates
25%	Exclusive access to supplier networks
25%	Early access to new products and services
25%	Competitive pricing
25%	Priority for customer service requests

Why Do B2B Buyers Switch Suppliers?

Loyalty breakers are operational. Suppliers must act quickly to protect relationships and stay ahead with a loyal customer base. Today, loyalty is no longer guaranteed; it's earned and re-earned with every interaction.

♡ Loyalty Lever

Based on the data, here are some strategies to keep B2B buyers from switching:

- **Deploy AI-powered personalization to improve Strategic Loyalty:** 24% are more loyal to suppliers that personalize their marketing
- **Use data to proactively uncover growth trends to convert Default Loyalty into Strategic Loyalty:** 23% are more loyal to suppliers that can scale with their organization as it grows
- **Develop strategies for Values-based Loyalty:** 22% are more loyal to suppliers that prioritize sustainable business practices
- **Demonstrate Adaptive Loyalty:** 23% are more loyal to suppliers that can adapt to their organization's new products and services
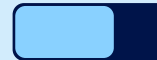
Factors Influencing Supplier Shifts

68%

- Poor customer service
- Cost considerations
- Reduction in quality products and services
- A decrease in the range of products and services

67%

- Supplier involvement in a controversy
- Pressure to change because of a lack of supplier innovation
- Missed delivery dates

66%

- Sustainability reasons
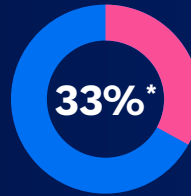- Their work with a competitor

A Snapshot of B2B Loyalty Trends

Loyalty is shifting toward personalized experiences, convenience, and value through loyalty schemes. Rising costs, supply chain disruptions, and changing buyer expectations make loyalty more conditional than ever.

In the past year, what's influenced your loyalty to suppliers?

%	
35%	Receiving consistent experiences
30%	Easy to use platform
29%	Loyalty schemes that drive value
29%	Personalized deals
29%	AI-centric solutions
27%	Peer reviews
26%	Commitment to sustainability
26%	Effective use of data
26%	Tariffs making loyalty unaffordable
26%	Cost-effective solutions

In the last 12 months, what made you less loyal?

33%* of buyers are less loyal because they are being offered generic and irrelevant products
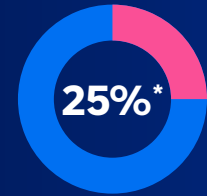
25%* of buyers are less loyal due to poor product integration with the rest of their organisation

♡ **Loyalty Lever**

Poor service and supply disruptions significantly diminish supplier loyalty in organizations. Stay ahead of customer needs by using a digital supply chain solution that helps improve accuracy and resilience in order fulfillment.

** Given the base size, these figures are indicative only*

In-depth Analysis

# From Static to Strategic: The Shift Toward Adaptive Loyalty

Loyalty is more than long-term relationships. Today, companies care about agility and relevance. Adaptive Loyalty is about choosing solutions that grow with your business, stay ahead of trends, and respond to change.

**26% of all respondents said they:**

- like to wait until a trend has become mainstream before seriously investing in any new tech or suppliers

- would rather experiment with emerging trends than risk being left behind by competitors

- are skilled enough to take advantage of emerging trends

- can respond quickly to unexpected market shifts and new buyer demands

♡ Loyalty Lever

To respond to evolving marketplace trends and needs, you need a powerful solution that unifies data sources and provides real-time financial insights. This technology helps you link loyalty efforts to revenue and margin outcomes.
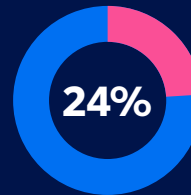
24% show **Adaptive Loyalty** by jumping on new B2B tech trends to have a competitive advantage
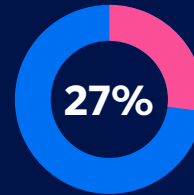
27% consider their current tech stack compatibility before adopting trends
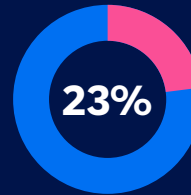
23% are agile enough to adapt to emerging trends

The Rise of AI-First Loyalty

B2B Buyers are increasingly drawn to suppliers who use AI to deliver intelligent, personalized customer experiences. Suppliers who embrace AI are earning loyalty that leads to long-term strategic partnerships.

95% **of buyers** say a supplier's use of AI positively influences their organization's loyalty

38% **of buyers** say AI has a very positive impact

22% **of buyers** say supplier loyalty would be positively impacted if the supplier appears highly in AI search

29% **of buyers** now prioritize suppliers and partners that make AI a central part of their products or services

22% **of buyers** are more loyal to suppliers who incorporate AI into their products

Where Loyalty Begins

Loyalty is increasingly shared across departments and viewed as a growth strategy. Sourcing the right supplier starts with smarter, more connected research. More B2B buyers are using AI-powered tools to discover and evaluate suppliers, now rivaling traditional methods like word-of-mouth. In 2025, AI chatbots are relied on more than industry experts.

How does your organization approach supplier loyalty?

- **39%** Loyalty is viewed as a strategic lever for growth
- **38%** Loyalty is shared across multiple departments
- **35%** Our supplier experiences across departments are currently too fragmented
- **33%** We have a formal loyalty strategy across all departments
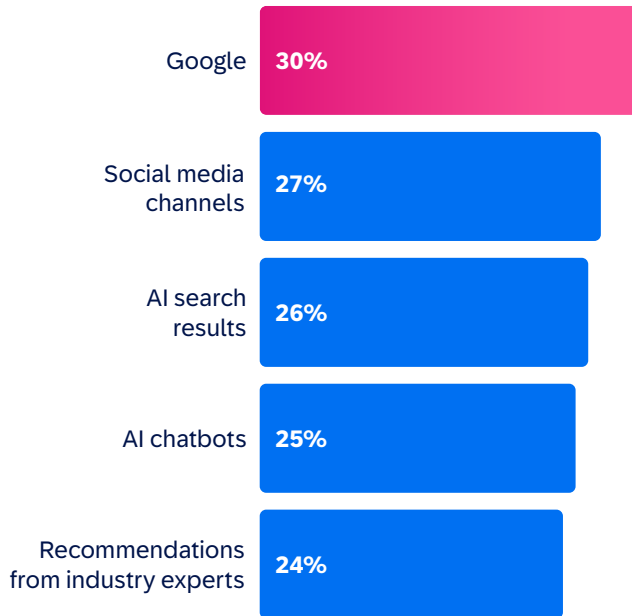- **28%** Our approach is too adhoc and reactive

The Channels Shaping Supplier Discovery

What type of content does your organization use when evaluating emerging products and services?

Channel	Percentage
Google	30%
Social media channels	27%
AI search results	26%
AI chatbots	25%
Recommendations from industry experts	24%

What are the top sources you use when researching a new supplier?

| Source	Percentage
LinkedIn	32%
AI-generated content	31%
Research reports	29%
News stories	28%
Third-party industry reports and peer reviews	28%
Whitepapers	28%

♡ Loyalty Lever

With an omnichannel marketing platform, you can meet your customers where they are and deliver what matters most to them. Cloud-based service solutions help you enable AI-driven case management and omnichannel service to enhance customer support effectiveness as well.
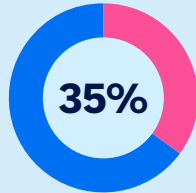
Why Companies Struggle to Measure Loyalty ROI

Many organizations struggle to quantify the Return on Investment (ROI) of their loyalty programs. This challenge stems from **fragmented data and unclear metrics.**

42%
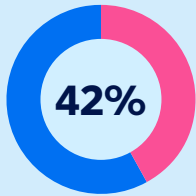
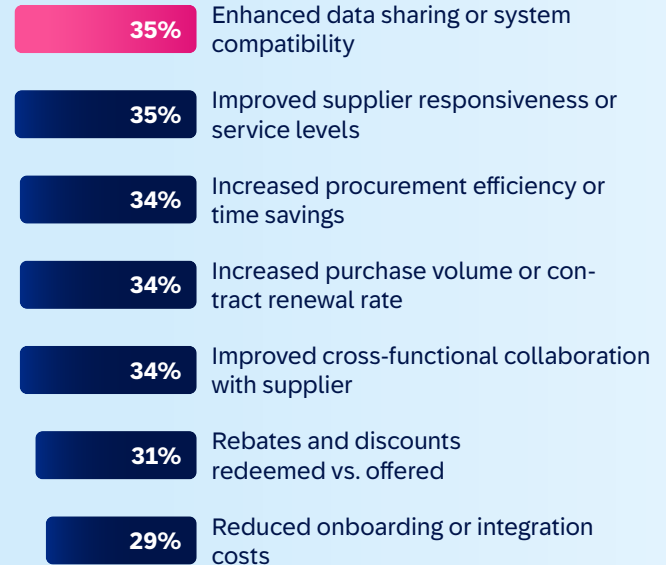**of buyers** in supplier loyalty programs say measuring ROI is somewhat easy

35%

of buyers tracking ROI say program success depends on data sharing and compatibility

♡ Loyalty Lever

Partner with a company that can help you close the loop on ROI measurement. You need a powerful solution that unifies data sources and provides real-time financial insights to link loyalty efforts with revenue and margin outcomes. These capabilities are crucial for Finance, Analytics, Procurement, Supply Chain, and CX teams aiming to demonstrate the tangible business impact of loyalty initiatives.

What does your organization use to evaluate the success of loyalty or incentive programs?

|	
35%	Enhanced data sharing or system compatibility
35%	Improved supplier responsiveness or service levels
34%	Increased procurement efficiency or time savings
34%	Increased purchase volume or contract renewal rate
34%	Improved cross-functional collaboration with supplier
31%	Rebates and discounts redeemed vs. offered
29%	Reduced onboarding or integration costs

Conclusion

Loyalty as a Growth Strategy

Loyalty must be woven into the fabric of the entire enterprise and connected back to the systems that run your business. When your customers feel understood and valued, they don't just buy once. They choose you over and over. That's the holy grail: transforming casual B2B buyers into lifelong advocates.
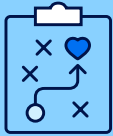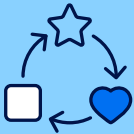
Ensure your loyalty strategy doesn't operate in a silo
Treat loyalty as a shared goal across Marketing, Sales, Services, HR, and Procurement.

Deliver personalized and data-informed experiences
Use AI to predict and respond to loyalty signals using real-time data.

Operationalize loyalty-defining moments as business processes
Achieve lasting growth by connecting data, personalizing customer interactions, and building trust across the customer journey.

›› What's next?

Leading brands partner with SAP to evolve from **understanding loyalty to engineering it.**

Turn your business insights into intelligent experiences and operational excellence. Every customer touchpoint is a chance to build lasting loyalty that fuels sustainable, profitable growth.

Methodology

This research was conducted by Opinion Matters among a sample of 3,008 decision-makers involved in enterprise tech purchases in the following roles: CFO, CEO, CMO, CTO, CIO, IT Directors, Heads of Digital and Procurement, and Heads of Buying/Buyers (18+) across the United Kingdom (UK), United States (US), Australia, Germany, and Taiwan. The data was collected between August 18 and 29, 2025.

Opinion Matters abides by and employs members of the Market Research Society, follows the MRS code of conduct, and follows ESOMAR principles. It is also a member of the British Polling Council.

* In this report, the six loyalty types have been calculated as follows:
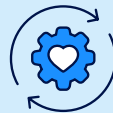
Strategic Loyalty: those respondents who strongly agree they have a favorite supplier they trust.

Incentivized Loyalty: those respondents who are loyal to certain suppliers and agree they are more loyal to those who offer rebates, volume discounts, loyalty points, and/or other similar incentives.

Legacy Loyalty: those respondents who are loyal to a certain supplier and agree they are more loyal to specific products or technologies than the suppliers that sell them.

Default Loyalty: those respondents* who are loyal to certain suppliers and do not show loyalty by recommending them to other industry organizations.

*Inverse of those who selected "We recommend them to other industry organizations."

Values-based Loyalty: those respondents who are loyal to certain suppliers and are more loyal to suppliers whose ethical, social or environmental values align with theirs.

Adaptive Loyalty: those respondents who jump on new B2B tech trends to have a competitive advantage.

Transform your customer journey with AI-powered insights and end-to-end visibility.

Discover how

SAP Emarsys

SAP Emarsys is the customer engagement solution for SAP Customer Experience, empowering businesses to deliver personalized, AI-driven, omnichannel experiences. Built for scalability and extensibility, SAP Customer Experience provides a suite of products across commerce, sales, service, marketing, and customer data, enabling businesses to exceed customer expectations with real-time, relevant engagement. From digitally native disruptors to global enterprises, SAP Emarsys helps bring out the best CX in every business by meeting customers where they are with the products, information, and experiences they need, exactly when and where they need them. For more information, visit: www.emarsys.com