SPRINGBIG

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What the platform is actually used for

Two questions, deliberately kept apart. **Traffic** — where the 34.9 million weekly requests go — is dominated by machines talking to machines. **Adoption** — how many of the 652 billing-active, non-demo merchants switch a feature on — is a different ranking entirely, and it is the one that describes the product. Where the two disagree is where the interesting decisions are.

Compiled 2026-08-16 652 active merchants · 34.9M weekly requests Measured, not sampled

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PART I

Traffic is not adoption

The single most important thing on this page: the busiest parts of the platform are not the most-adopted parts, and neither ranking alone should drive a roadmap.

Weekly requests	Active merchants	Transacting in 30d	Running automations
34.9M	**652**	**71.9%**	**45.1%**
63% is POS integration polling	excl. 80 demo accounts	469 merchants with a visit	294 merchants, 23 campaign types

SURFACE	SHARE OF TRAFFIC	MERCHANT ADOPTION	WHAT THAT MEANS
POS integrations	62.8%	~87%	Machine chatter. High volume, low product surface.
Consumer mobile app	15.2%	81% (org-level)	The busiest human-facing surface.
Consumer web wallet	5.7%	—	Second consumer channel, an order of magnitude smaller.
Merchant dashboard	2.3%	—	**291 CPU-hours/week across 275 endpoints** — the most expensive traffic we serve.
Enrollment / join	1.0%	—	Small in volume, top of the entire funnel.

Read the third column, not the second. POS polling generates two-thirds of all requests without a human ever seeing a screen. The merchant dashboard is 2.3% of requests but 291 hours of weekly compute — roughly **50× more expensive per request** than anything else. Volume rankings would tell you to invest in POS; cost and adoption rankings tell you something quite different.

1

Who these merchants are

Before any feature number means anything, the base has to be split correctly. Demo accounts are excluded throughout, and the platform's own `platform_type` turns out to disagree with what merchants actually do.

> **Denominator: 652, not 732. 80 active accounts (10.9%) are flagged `demo_account`** and are excluded from every figure in this report. Every percentage below is against 652 active, non-demo merchants.

As labelled: `merchants.platform_type`

SEGMENT	MERCHANTS	% OF 652
`loyalty_and_messaging`	404	62.0%
`messaging_only`	233	35.7%
`messaging_non_integrated`	8	1.2%
`loyalty_only`	7	1.1%

As measured: what they actually did in 30 days

SEGMENT	MERCHANTS	% OF 652	DEFINITION
Loyalty + messaging	274	42.0%	POS-sourced visits and campaigns sent
Loyalty only	190	29.1%	POS visits, no campaigns
Dormant	141	21.6%	Neither — billing-active, doing nothing
Messaging only	42	6.4%	Campaigns, no visits at all
Non-integrated loyalty + messaging	1	0.2%	Visits with no POS source, plus campaigns

> **The label and the behaviour disagree, substantially.** 233 merchants are flagged `messaging_only`, but **102 of them record real POS-sourced visits** — through shopify, hifyre, dutchiepos, lightspeed and others. Measured by behaviour, true messaging-only is **42 merchants, not 233**. Anything that segments on `platform_type` — pricing, packaging, lifecycle email, success outreach — is working from a field that is wrong for roughly one merchant in six.

The non-integrated loyalty group is, as expected, effectively empty: **one merchant** recording visits with no POS source while also sending campaigns. It is a real configuration, not a segment worth building for.

The dormant group is the one to look at. 141 billing-active, non-demo merchants sent no campaign and recorded no visit in 30 days — **21.6% of the paying base**. Some are seasonal or mid-onboarding; the platform report's churn analysis found ~30 have been silent for over two years. This is the same population, measured a second way.

2

The self-registration pipeline

New merchant creation has more than quadrupled since December, and it is almost entirely messaging-first.

MONTH	CREATED	DEMO	MESSAGING-FIRST	ACTIVE TODAY
2025-12	11	1	9	9
2026-01	23	1	18	12
2026-02	34	1	28	24
2026-03	40	1	29	24
2026-04	13	0	11	9
2026-05	24	0	19	19
2026-06	33	12	30	11
2026-07	47	14	42	16
2026-08	50	29	47	14

August is a partial month and already the largest on record. The composition changed sharply from June onward: **demo accounts went from ~1 a month to 29 in August**, and 94% of new merchants are created as messaging-first.

Two readings, and the data cannot yet separate them. The demo surge from June coincides with the pipeline opening up — these are either genuine self-serve trials, or automated/test signups inflating the count. The conversion signal is not yet interpretable: 14 of August's 50 are active today, but so are 16 of July's 47 and 11 of June's 33, and none of those cohorts has had time to mature. **What is measurable now:** volume is rising sharply and the product these merchants land on is messaging, not loyalty. Whether that converts is the question to instrument next — it is not answerable from merchant records alone.

3

What merchants actually turn on

Distinct billing-active, non-demo merchants against a denominator of 652, measured over 30 days.

FEATURE	MERCHANTS	% OF 652	
Transacting (any visit)	469	71.9%	CORE
Rewards configured (excl. seed default)	428	65.6%	CORE
Awarding points	343	52.6%	GAP
Redemptions	326	50.0%	CORE
Campaigns sent	317	48.6%	CORE
Auto-campaigns enabled	294	45.1%	CORE
Audiences built	284	43.6%	CORE
Referrals active	34	5.2%	NICHE
Gift cards	14	2.1%	NICHE

Seeded defaults are not adoption. 725 active merchants have an active reward defined, which would read as 99.0% adoption. But **252 of them (34.8%) have nothing but a row literally named "Sample Reward"**, provisioned at signup — 55.9% of all first rewards are created within an hour of the merchant record itself. Across 2,488 active "Sample Reward" rows, **7** have been redeemed in 180 days. Excluding the seed default, **428 merchants (65.6%)** have real reward configuration, and that is what the table above reports.

The sharpest number here is the points gap. 469 merchants recorded a visit in the last 30 days, but only **343 awarded any points**. That is **126 merchants — 27% of everyone transacting — running a loyalty platform without the loyalty.** They may be POS-integrated for data only, mid-onboarding, or misconfigured. Whichever it is, it is the largest single adoption gap on the page and the clearest expansion target.

Adoption clusters tightly: once a merchant is genuinely live, they tend to run campaigns, audiences and automations together in the 40–45% band. There is very little partial adoption between "transacting" and "using the product" — merchants are mostly on one side or the other.

There is a messaging-only segment, and it is small. 42 active merchants sent a campaign in 30 days without recording a single visit. They use springbig as a messaging platform rather than a loyalty platform — no POS data flowing, no points, no redemptions. That is 6.4% of the active base, and it is worth naming because these accounts will look broken on every loyalty metric while being served exactly what they bought. Any funnel or health metric that assumes visits should exclude them.

4

The loyalty funnel, end to end

Thirty days of activity, from grant issued to reward redeemed.

STAGE	VOLUME (30D)	MERCHANTS
Reward grants issued	33,971,992	252
— of which coupons	32,202,516	—
— of which bonus	1,480,656	—
— of which instant rewards	288,820	—
Redemptions	1,362,577	328
— traceable to a grant	378,013	192

About 1.1% of issued grants convert to a redemption. That is not necessarily a problem — bulk coupon issuance to an entire member base is a broadcast, not an offer, and a low conversion rate is expected. But 32.2M coupons a month against 378K grant-linked redemptions is worth a deliberate look at whether issuance volume is doing work. Note also that only 192 of 328 redeeming merchants produce grant-linked redemptions; the rest redeem against point balances directly.

5

Automation: three winners and a long tail

23 auto-campaign types are enabled somewhere in production. Three account for most adoption; most of the rest are used by fewer than 30 merchants each.

TYPE	MERCHANTS	% OF 652	INSTANCES
After Join	181	27.8%	211
Birthday	167	25.6%	170
Win Back	152	23.3%	337
Budz	69	10.6%	69
After Visit	51	7.8%	75
Visit Milestone	50	7.7%	586
App Download	29	4.4%	29
Reward Available	28	4.3%	49
Big Purchase	28	4.3%	34
Spend Milestone	28	4.3%	246
By Join Date	25	3.8%	87
Points Expiration	24	3.7%	37
Delayed After Visit	19	2.9%	51
Points Milestone	16	2.5%	90
Email Add	16	2.5%	16
Interests Add	13	2.0%	13
API Triggered	13	2.0%	5,146
Medical Card Expiration	12	1.8%	17
Birthday Add	10	1.5%	10
Daily Deals	8	1.2%	14
Abandoned Cart	6	0.9%	6
After New Subscriptions	6	0.9%	9

Three types have zero enabled instances anywhere: Unredeemed Reward Reminder, Expiring Reward Reminder, and Join by Referral. They exist in the type registry and in the code, and no merchant runs them.

Instance count and merchant count tell different stories. API Triggered is used by only 13 merchants but carries **5,146 configured instances** — a handful of sophisticated accounts building heavily on the API. Visit Milestone shows the same shape: 52 merchants, 592 instances. These are power-user features, and their low adoption percentage understates their strategic weight.

6B

MessageTemplates: a second sending vertical

Alongside campaigns and auto-campaigns there is a third, largely separate messaging path. It behaves much like API-triggered auto-campaigns but carries none of the stashboard features, and the merchants using it are mostly not dispensaries.

Sends, all time	Templates defined	Sending in 30d	Volume vs peak
8.65M	**27,719**	**10**	**–99%**
message_template_logs	745 merchants	merchants · 58,383 sends	1.37M/mo → 17.8K/mo

The volume is concentrated in suspended accounts

MERCHANT	STATUS	POS	SENDS (ALL TIME)
Game Story Inc	suspended	none	5,910,253
GTI Delivery	active	none	1,197,180
Sunflower	suspended	none	713,003
GrowHealthy	lost	none	289,827
Bring It On!	active	none	252,653
Real Gaming	suspended	none	144,246
Gold Machine	lost	none	39,279

78% of all template sends belong to four suspended merchants — 6,788,094 of 8,654,467. **Game Story Inc alone accounts for 68%** (5.91M). Active merchants account for 1.54M across 19 accounts, and lost merchants a further 330K.

This is largely a non-cannabis vertical. Game Story, Real Gaming, Gold Machine, Skillz, Blitz Mania and Bring It On! are gaming operators, and almost none carry a `pos_type` at all. The monthly trend — 1,368,234 sends in December 2025 falling to 17,800 in August 2026, a **99% decline** while the merchant count held between 6 and 17 — is not seasonality or churn among the remaining users. It is the suspension of a small number of very high-volume gaming accounts.

For its current users it is the only channel

The ten merchants sending via templates in the last 30 days sent **zero campaigns** over the same twelve months. This is not a secondary path they also use — it is their entire messaging

surface. Bring It On! sent 30,019 template messages to 16,682 members; GTI Delivery 15,448 to 3,864; Yayz 9,660 to 2,797.

> **The 12.8% error rate is consent enforcement, not failure.** Of 7,499 errors in 30 days, every one is an eligibility rejection caught late in the pipeline: `Invalid member` (3,931), `member does not allow sms` (3,215), and 343 TCPA-delayed sends that failed the same check. The system is declining to message ineligible recipients — working as intended, though catching it earlier would avoid the wasted pipeline work.

Scale of the supporting tables: 8,654,467 send logs, 3,011,259 status rows, 1,414,187 error rows, 83,264 template states. Templates themselves are 27,719 rows across 745 merchants, so **definition is far more widespread than use** — 230 active non-demo merchants have at least one template defined, but only 10 sent anything in 30 days.

6

Messaging channels

Email carries twice the volume of SMS, but SMS reaches twice as many merchants.

CHANNEL	MERCHANTS	MESSAGES (30D)
SMS	283	9,626,437
Email	138	19,109,816
Push	68	4,807,364
iMessage	0	0

Channel combinations, by merchant count: SMS-only 207 · SMS+email 46 · email-only 76 · all three 31 · push-only 24 · SMS+push 27 · email+push 11.

SMS is the default; email is the volume. 207 merchants use SMS and nothing else, while only 31 run all three channels. Email's higher total comes from a smaller, higher-volume group of senders. iMessage is built and carries no traffic at all.

7

Where the traffic actually goes

34.9 million requests over seven days, classified by who is calling.

AUDIENCE	REQUESTS	SHARE	CPU HRS	ENDPOINTS
POS integrations	21,942,944	62.8%	563.7	21
Consumer mobile app	5,322,446	15.2%	72.8	33
Infrastructure / health	3,153,813	9.0%	4.5	11
Consumer web wallet	1,982,830	5.7%	72.2	41
Merchant dashboard	804,979	2.3%	291.0	275
Analytics & homepage	796,552	2.3%	2.6	4
Partner / public API	464,750	1.3%	5.5	43
Enrollment / join	358,403	1.0%	3.2	25
Other merchant-facing	105,408	0.3%	11.6	296

The five busiest individual endpoints are all POS: member lookup (7.5M), member list (4.1M), rewards list (3.1M), the mobile stashboard (3.1M) and offers list (2.5M).

296 endpoints serve 0.3% of traffic. Nearly 40% of the mapped endpoint surface handles almost nothing, while 21 POS endpoints handle 63%. That tail is the maintenance surface — every one of those endpoints carries test, security and upgrade cost. It is the most concrete deprecation target on this page, though the API-contract work in the platform report is a prerequisite: some are unreachable rather than unused.

8

The POS surface is long-tailed

No integration exceeds 17% of active merchants. There is no dominant partner, and that is a strategic fact rather than a technical one.

POS	ACTIVE MERCHANTS	% OF 652
leaflogix	109	16.7%
dutchie_ecom	107	16.4%
dutchiepos	82	12.6%
cova	78	12.0%
(no POS configured)	69	10.6%
flowhub_maui	40	6.1%
headset	40	6.1%
treez	27	4.1%
iheartjane	26	4.0%
blaze	25	3.8%
posabit	25	3.8%
birchmount	21	3.2%
hifyre	21	3.2%
everything else (12+ vendors)	<21 each	<3%

Two readings, both true. Supporting 25+ integrations for a base this size is expensive, and the tail below 3% is where that cost concentrates. But breadth is also the moat — a merchant on an obscure POS has nowhere else to go. The 69 merchants with no POS configured are the more actionable group: they are active accounts running without the integration that makes the product work.

9

Where configuration and code meet

Several findings in this report are not engineering defects and not account oversights on their own — they occur where a per-account setting has no system-level check behind it. Both halves have to move for them to stop recurring.

The pattern

Three independent flags govern whether a merchant accrues loyalty points: `merchant.loyalty`, `member.allowed_loyalty` and `merchant_location.loyalty_points`. A fourth field, `merchant.platform_type`, describes what the account was sold. Nothing reconciles them.

```
def loyalty_enabled?                        # visit.rb:413
  if merchant&.loyalty && member&.allowed_loyalty
    return false if merchant_location && !merchant_location.loyalty_points
    true
  ...
```

`platform_type` is absent from that method. Its only enforcement is a permissions check on dashboard access (`user.rb:116`). The result is that the commercial description of an account and its runtime behaviour can drift apart indefinitely, and nothing surfaces the drift.

OBSERVATION	SYSTEM SIDE	ACCOUNT SIDE
231 of 233 merchants labelled `messaging_only` have `loyalty = true`	No validation ties the two fields together	The label no longer describes the account
115 of 343 point-awarding merchants have no loyalty line item; **102** also redeem	Nothing reconciles feature use against billing configuration	Plan assignment needs a periodic review
252 merchants hold only the seeded `Sample Reward`	The default persists indefinitely with no prompt	Catalog setup is an unfinished onboarding step
141 merchants billing-active with no activity in 30 days	No dormancy signal exists in the product	Account review would surface these first
69 active merchants have no POS configured	Nothing flags an account that cannot deliver its core value	An integration step was never completed
1.79bn points outstanding where members have no catalog to redeem against	Points accrue regardless of catalog state	Rewards were never configured after enablement

Why these persist. Each item is invisible from both sides. From engineering, a merchant with `loyalty = true` and no reward catalog is operating normally — every request succeeds. From account management, nothing in the product reports that the configuration is incomplete. The gap is not effort on either side; it is that no view exists showing an account's intended state next to its actual one.

There is a least-privilege dimension to this. Several of the corrections implied above — reconciling a platform label against an enabled feature, clearing a seeded default, attaching the right plan — are not currently self-service. They are reachable through paths that assume production access. In a SOC 2 / HIPAA posture that inverts the intended control: routine account configuration should not require the most privileged access in the organisation, and the people accountable for account state should be able to change it without one. Every configuration task that can only be completed with production access is both an access-control finding and a bottleneck, and it is worth treating as the former.

What would close it

CHANGE	OWNER	EFFECT
Reconcile `platform_type` against `loyalty` at save time, or derive one from the other	Engineering	Prevents new drift
A configuration-health view: enabled features vs configured features vs billed features, per account	Engineering	Makes the gap visible to the people who can close it
Flag point accrual where the merchant has no non-seed reward	Engineering	Stops liability accruing against an empty catalog
Periodic review of accounts flagged by that view	Account management	Closes the existing backlog
Treat catalog setup and POS connection as completion criteria, not optional steps	Shared	Prevents the backlog reforming
Make each of these states editable from the admin UI, with an audit trail	Engineering	Removes production access from routine configuration — a control improvement as much as an efficiency one

The constructive read. Every item here is a configuration state, not a fault, and each is a short query away from a dashboard. Building that one view converts a recurring manual audit into something the product reports on its own — which is the difference between finding these once and never needing to look again.

What this says about the roadmap

OBSERVATION	SO WHAT
115 point-awarding merchants have no loyalty line item	102 of them also redeem. At Loyalty Basic rates (~$342/mo) that is roughly $470k/yr — treat as an upper bound until bundled plans are ruled out.
126 transacting merchants award no points	The largest expansion opportunity in the base. Diagnose before building anything new.
platform_type does not gate loyalty	231 of 233 messaging-only accounts have loyalty enabled. The field describes the sale, not the system.
69 active merchants have no POS configured	Active accounts that cannot get full value. An onboarding question, not an engineering one.
Dashboard costs 291 CPU-hrs on 2.3% of requests	Optimisation here buys more headroom than anywhere else in the estate.
296 endpoints serve 0.3% of traffic	The maintenance tail. Deprecation candidates, pending the API-contract audit.
3 automation types have zero users	Built and unused. Retire them or find out why they never landed.
1.1% grant-to-redemption conversion	32M coupons a month. Worth confirming that issuance volume earns its cost.
13 merchants run 5,146 API-triggered campaigns	A small power-user segment building deeply on the API. Disproportionate strategic value.

METHOD

Method & caveats

Adoption figures come from the production Postgres replica, read-only, over 30 days, counting distinct merchants where `current_status_cache = 'active'` and `demo_account IS NOT TRUE` (652). Traffic figures come from New Relic over 7 days, filtered to `appName = 'springBIG'` to exclude staging and beta. Endpoint classification is by URL prefix and is mine, not a system-defined taxonomy.

- **Seeded rewards are excluded from the reward figure.** Merchants are provisioned with a default "Sample Reward" at signup. Counting it would report 99.0% adoption; excluding it gives 64.6%. The test was name plus creation-time proximity to the merchant record, corroborated by redemption activity (7 redemptions across 2,488 seeded rows in 180 days).
- **Merchant segments were excluded from the adoption ranking.** All merchants have at least one, across 1.55M rows — that is default provisioning, not a feature choice, and reporting it as 100% adoption would be misleading.
- **Messaging volumes are denormalized campaign counters** (`campaigns.sms_sent` and siblings), i.e. what the application recorded at send time. Delivery-confirmed counts from the log tables would read lower. The log tables were not queried: `sms_logs` is 1,410 GB and `push_logs` has no date index, so any date-bounded query forces a sequential scan on a shared replica.
- **Reward-grant counts use a primary-key range** rather than a date predicate, because `reward_grants` (586 GB) has no index on `created_at`. The boundary was binary-searched and verified accurate to within seconds. The counts are real `count(*)` results.
- **Native-app adoption is org-level, not merchant-level.** `app_settings` keys on `merchant_organization_id`, so active merchants sit under an organization with a native app — which is not the same as 594 merchants each having their own.
- **Cloudflare cannot answer this question** and was not used. No POS or partner traffic transits the edge; its top hosts are SMS landing domains and S3. Feature usage lives in Rails and Postgres.
- Visit counts use `transaction_date` (business date); redemption counts use `created_at` (insert time). Slight window skew between the two.