

GHA DISCOVERY

What Travellers Want Most From Loyalty Programmes



The perceptions, preferences and priorities of today's travellers and how the GHA DISCOVERY loyalty programme stacks up.

The hotel loyalty landscape in 2024

In the dynamic landscape of the hospitality industry, staying attuned to the ever-evolving needs of travellers is paramount for maintaining a competitive edge.

At GHA DISCOVERY—the loyalty programme shared by the 40 independent brands of Global Hotel Alliance (GHA) with more than 800 hotels in 100 countries and 26 million members—we value the voice of our customers and regularly seek their input to understand what they value most.

Our 2024 research was conducted in collaboration with Bond Brand Loyalty and includes a thorough review of the competitive landscape with a lens on loyalty and customer marketing trends, as well as quantitative research exploring traveller preferences, global market and tier differences, and the luxury customer.

Through this research, we aimed to conduct a programme “health check” as well as gather fresh insights to inform and prioritise strategic initiatives to better meet the needs of our members.

In this paper, we will delve into the methodology employed and share key findings of what travellers want most from hotel loyalty programmes—across recognition, benefits and rewards. We believe that the insights garnered from this study will benefit our programme and contribute to the broader industry, all with the shared goal of enhancing customer satisfaction and loyalty.

Kristi Gole

Executive Vice President, Strategy
Global Hotel Alliance



Introduction

Executive Summary

In this report—What Travellers Want Most From Loyalty Programmes—we highlight key findings from Q1 2024 research, revealing what customers value most from hotel loyalty programmes. We identify the preferences and priorities of today's global travellers and, more specifically, their thoughts on the GHA DISCOVERY programme.



GET THE BASICS RIGHT

When selecting a hotel, almost all members want reassurance that their hotel is of good quality and in a convenient location. Loyalty programme benefits and customer service are nearly as important. Ensuring these core needs are fulfilled is essential.



PERK UP

Perks and benefits associated with hotel loyalty programmes are the features most important to members, more than rewards and discounts. Room upgrades continue to be the benefit members value most, across tiers, along with other in-hotel benefits such as complimentary breakfast and late checkout.



RECOGNISE

More than three quarters of elite members say GHA DISCOVERY makes them feel valued. Elite members also have the strongest understanding of how the programme works, from earning and redemption to the value of DISCOVERY Dollars (D\$) rewards.



KEEP IT INTERESTING

Looking ahead at ways to enhance the programme, members are interested in expanded options for how to earn and spend D\$, such as through partnerships with airlines and restaurants.

Methodology

An online survey was sent to two million members in the GHA DISCOVERY emailable database, covering 10 markets and all tiers to gather representative data. The audience had stayed at one or more GHA DISCOVERY hotels in the previous 12 months. The study was conducted between 23rd and 30th January 2024.

Total respondents surveyed:

5,662

Survey languages:

English, Spanish, German and Chinese

Responses were collected globally, with more detailed analysis on ten markets including:



SGP
21%



AUS
18%



DEU
17%



CHN
12%



USA
11%



GBR
8%



THA
7%



IND
3%



UAE
3%



ESP
1%

Member tier split:

Silver 21%

Gold 17%

Platinum 27%

Titanium 35%

The What Travellers Want Most from Loyalty Programmes report offers a comprehensive overview of member perceptions of GHA DISCOVERY versus its competitors. This research is repeated on an annual basis to monitor changing perceptions of the programme and the sector as they evolve.

Global Hotel Alliance (GHA) is the world's largest alliance of independent hotel brands with 40 brands and more than 800 hotels in 100 countries.

Its award-winning loyalty programme—GHA DISCOVERY—provides 26 million members with recognition, rewards and exclusive experiences across its hotels, both with and without a stay. GHA DISCOVERY generated US\$2.3 billion in revenue and 10 million room nights in 2023.

Through membership in GHA, brands expand their global reach, drive incremental revenue and reduce dependence on third-party channels, all while maintaining management independence and individual positioning.

For more information, visit globalhotelalliance.com or ghadiscovery.com.

Tiers Explained

With GHA DISCOVERY, the more members stay or spend across the portfolio of properties and brands annually, the faster they move up the four-tier system:

	SILVER	GOLD	PLATINUM	TITANIUM	
Membership Tier	Upon joining	Stay 2 times or Spend USD 1,000	Stay 10 nights or Spend USD 5,000 or Stay at 2 brands	Stay 30 nights or Spend USD 15,000 or Stay at 3 brands	
Rewards and Instant Savings	Earn D\$ on Eligible Purchases*	4%	5%	6%	7%
	Spend D\$ on Eligible Purchases*	●	●	●	●
	Member Rates—Save 10% or more**	●	●	●	●
	Exclusive Offers	●	●	●	●
Stay Benefits	Complimentary Wi-Fi	●	●	●	●
	Room Upgrade***			●	Double
	Welcome Amenity			●	●
	Early Check-in***				11 a.m.
	Late Checkout***			3 p.m.	4 p.m.
	Guaranteed Room Availability 48 hrs prior***				●
	Additional Brand Benefits				●
Member Access	Experiences	●	●	●	●
	Local Offers	●	●	●	●
	Transfer, Buy or Donate D\$	●	●	●	●
	Status Sharing				●

*Terms & Conditions apply.

**At participating hotels.

***Subject to availability.

ghadiscovery.com

DISCOVERY Dollars (D\$) Explained

D\$ is the flexible rewards currency of the GHA DISCOVERY loyalty programme. Upon joining, members start receiving up to 7% back in D\$ on eligible purchases every time they visit a participating hotel. D\$1 equals USD 1, so the value is clear.

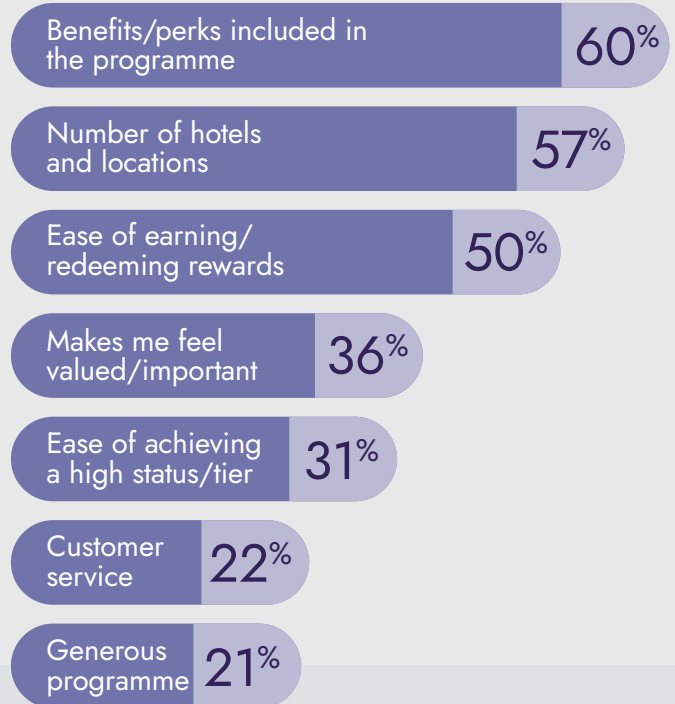
Members spend D\$ across participating hotels, from rooms to dining, spa, golf and Experiences. They can also choose to save D\$ up for their next dream getaway. Or treat themselves to an opulent room upgrade, that really nice bottle at dinner, the massage plus facial or explore a destination with a curated Experience ... there are countless ways to spend D\$. At checkout, members simply put their D\$ towards their bill to help pay for their indulgences.

What loyalty members want

FOCUS ON FUNCTIONAL BENEFITS

Members seek a programme that meets their functional travel needs, with access to perks and benefits identified as the most important driver of programme preference (60%) and number of hotels and locations (57%) as second in importance. Ease of earning and redeeming rewards was deemed the third most important need (50%) as, after meeting functional needs, members prioritise convenience and reduced friction in their travels.

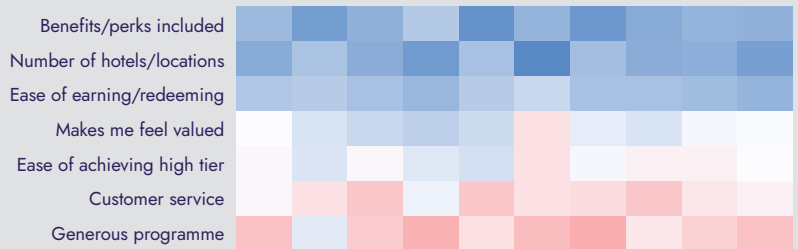
WHAT MEMBERS WANT: FAVOURITE FEATURES OF MEMBERS' PREFERRED PROGRAMMES



TRENDS BY MARKET

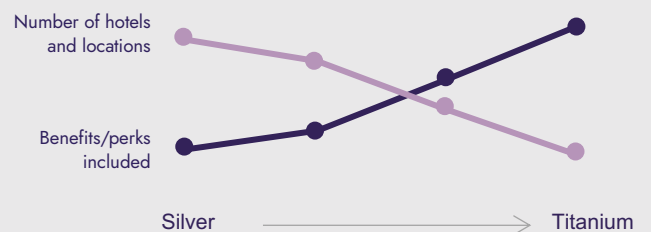
Favourite programme features are generally the same across markets, with benefits/perks, number of hotels/locations and ease of earning/redemption as most important. Members in Singapore, Thailand and China are more interested in the benefits and perks included in the programme, while Spain, India, US, Australia and Germany prioritise the number of hotels and locations available in the programme.

In China, the perception of generosity is far more important than in other markets (35% vs 21% overall); in contrast, generosity is the least valued aspect for members in India, where they instead seek programmes that make them feel valued and important (45% vs 36% overall) while having higher expectations for customer service (32% vs 22% overall).



VARIES BY TIER

The importance of benefits and perks increases with tier status, with top-tier members indicating this as most important. Members in higher tiers are more likely to expect recognition and generous programme benefits, while at the same time, they want the programme to make it easy to achieve higher tier status. The number of hotels and locations available in a programme is less important as tier status increases, indicating a greater affinity for the programme experience over choice of hotel.



Competitive programme key findings

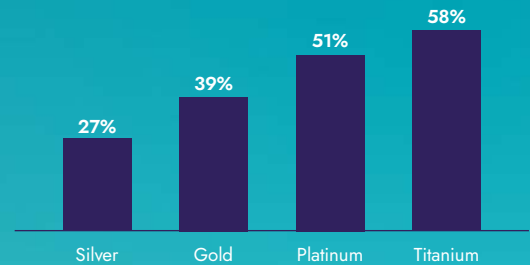
MEMBERS ARE ACTIVE IN SEVERAL OTHER PROGRAMMES

GHA DISCOVERY members are active in several programmes and, surprisingly, the higher the tier, the more likely this is to be the case, with programme preferences varying by market. Overall, 6 in 10 top-tier members are also active in Marriott Bonvoy and just under half are active in Hilton Honors and IHG One Rewards.

YET THEY LOOK TO GHA DISCOVERY FOR LUXURY AND UNIQUENESS

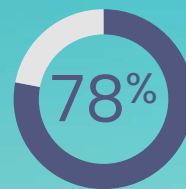
GHA DISCOVERY continues to own perceptions of luxury in the hotel loyalty space, with 4 in 5 members viewing it as a luxury programme, and half consider it more unique than other hotel loyalty programmes. Members in the UK, India, Thailand, China and UAE are most likely to consider GHA DISCOVERY a luxury programme. In addition, members who stayed at Ultratravel Collection hotels are more likely to say GHA DISCOVERY is a luxury programme (85%) vs those who have not (78%). Members in China and Thailand are far more likely to consider GHA DISCOVERY most favourably and are more likely to consider it unique among other programmes.

PREFERENCE FOR GHA DISCOVERY AS PREFERRED PROGRAMME



Preference for GHA DISCOVERY as their favourite programme increases with tier status.

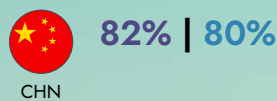
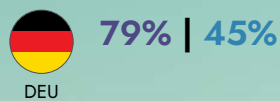
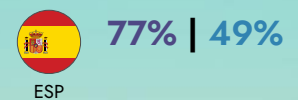
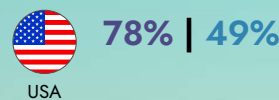
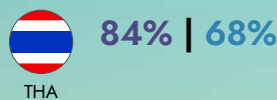
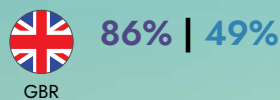
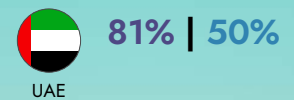
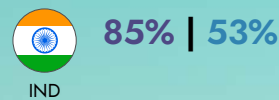
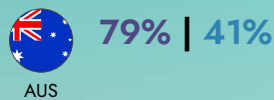
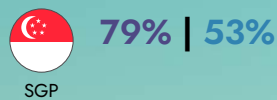
Member perceptions of GHA DISCOVERY



GHA IS A LUXURY HOTEL PROGRAMME



GHA IS MORE UNIQUE THAN OTHER PROGRAMMES



The quality of hotels matters

HOTEL SELECTION CRITERIA

When members were asked what motivated them to stay at a hotel, the most cited reason was that the hotel will be of good quality (97% of respondents), followed by convenient location (92%) and loyalty programme benefits (90%). In addition, when we compared responses from members who stayed at Ultratravel Collection hotels compared to those who did not, both are motivated by affordability and discounts (81% luxury members vs 86% non-luxury).

While quality of accommodation and convenient location are important to all tiers, elite members are more motivated by loyalty programme benefits when selecting a hotel.

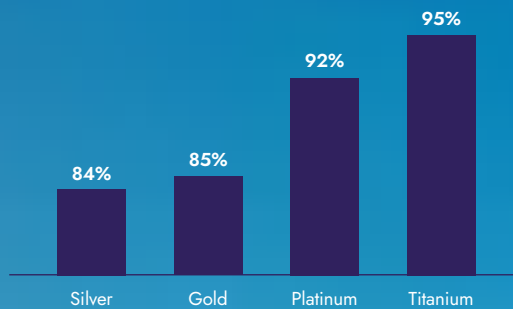
BY MARKET

All markets rank quality of accommodation as the most important factor when selecting a hotel. Members in the US, Australia and Singapore value location more than those in Thailand, India and China. Loyalty programme benefits are close to the top in China, Thailand and India, and a close third spot for Singapore, UAE, Spain and Germany. Affordability and discounts are appreciated most in Australia and Singapore.

While other factors such as hotel brand, amenities such as pool and gym, online reviews and sustainability practices are also valued, they weren't listed as the most important factors in the decision-making process.



ELITE MEMBERS PRIORITIZE LOYALTY PROGRAMME BENEFITS WHEN SELECTING A HOTEL



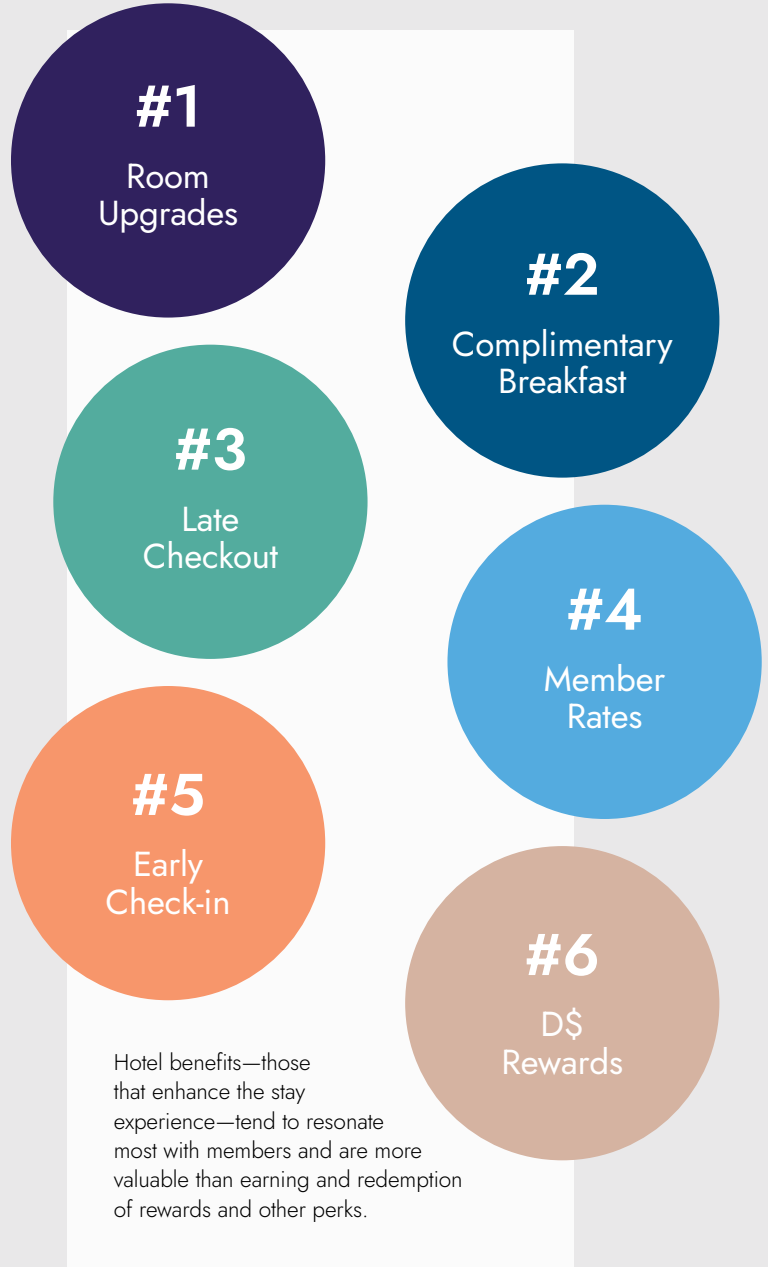
Importance of programme benefits, by tier

The benefit rankings

When asked which benefits are most valuable, GHA DISCOVERY members across all tiers ranked room upgrades as most important. Complimentary breakfast placed second and late checkout tied with member rates at third. Among the top-ranked benefits, which also include early check-in and earning D\$ rewards, only complimentary breakfast is new, indicating the ongoing appeal of GHA DISCOVERY's core benefits. Complimentary breakfast will be available to top-tier members at participating brands this year.

While hotel benefits are equally important to all tiers, discounted member rates are slightly more important to lower tiers, and the ability to use D\$ across all GHA DISCOVERY brands is more important to top-tier members.

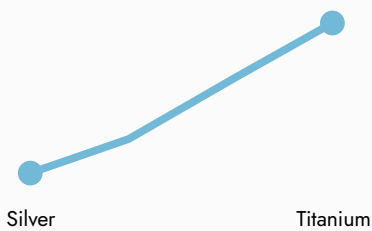
WHAT MEMBERS WANT



STRONG UNDERSTANDING OF PROGRAMME MECHANICS

Members understand programme rewards and more specifically, there is a strong understanding of DISCOVERY Dollars (D\$) among GHA DISCOVERY members. They understand how to earn D\$ (85%), the value of their D\$ (84%), and how to convert the value to their local currency (87%), particularly given that D\$1 is equal to USD 1.

Knowledge is highest in China (95%) as well as among top-tier members who have the most experience with the rewards currency (94%). Also, the higher their tier, the more strongly members feel that D\$ are easier to spend than points in other programmes.



As members move up in their tier status, their understanding of how to spend D\$ increases.

Outside the hotel

MEMBER-ONLY IMMERSIVE EXPERIENCES

While enhancing the stay experience for members is a priority, another key element is offering immersive experiences exclusively for GHA DISCOVERY members.

Members are most interested in private walking tours to explore local attractions, vineyard and beverage tasting tours, historical, museum and cultural tours, and nature tours.

The US is most interested in historical tours and the least interested in sports activities. Members from China were the least interested in vineyard/ beverage tasting tours, instead prioritising nature and historical/cultural tours. Those in the UAE show the strongest interest in a wide variety of experiences, including adrenaline activities.

Private walking tour of local attractions **49%**

Vineyard and beverage tasting tour **46%**

Historical, museum or cultural tours **41%**

Nature tour **39%**



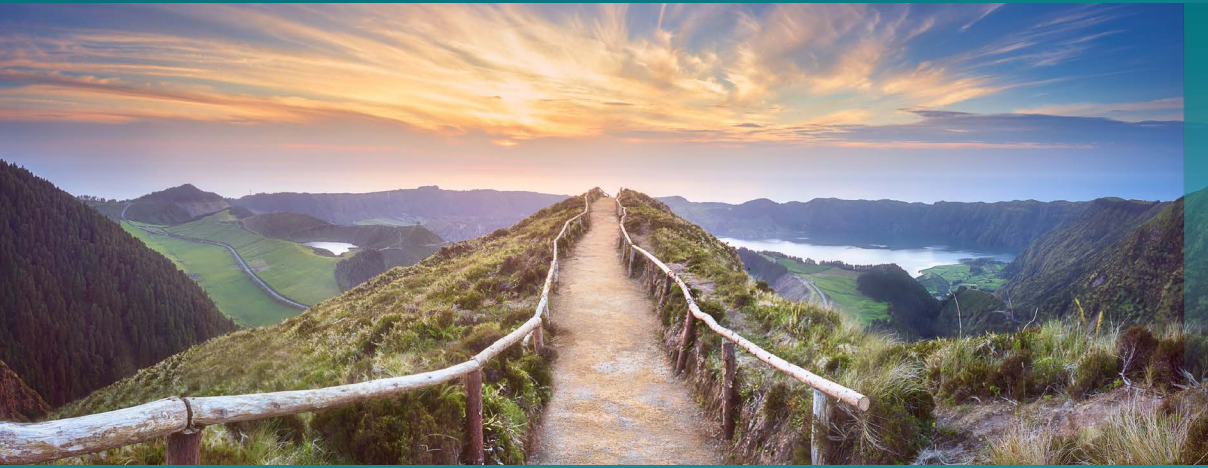
PARTNERSHIPS

While loyalty members appreciate the core benefits at hotels, they are interested in the ability to earn and spend rewards in partner businesses.

Among the range of partners evaluated, we found restaurants and airlines the most popular, consistent across all tiers. Retail stores, while significantly lower in comparison, are of strong interest in India, Singapore and Australia. Theme parks present an interesting partnership opportunity in China, India, UAE and Singapore.

What Travellers Want Most From Loyalty Programmes

Thank you for reading the 2024 edition of this report. As trends in travel, hospitality and loyalty evolve, we will continue to monitor the landscape and listen to our members in order to evolve the GHA DISCOVERY programme and remain relevant and distinct.



GHA DISCOVERY
REWARDING LIFE'S JOURNEYS

