

GHA DISCOVERY

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# 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.

# What Travellers Want Most From Loyalty Programmes

As market dynamics and customer preferences continue to evolve in our industry, keeping pace with travellers' evolving needs is essential for sustaining a competitive edge. At GHA DISCOVERY—our global loyalty programme that unites the 45 independent hotel brands of Global Hotel Alliance (GHA), with more than 850 hotels in 100 countries and serving 30 million members—we are committed to understanding our members and their expectations. As part of our ongoing customer research initiatives, we launched a fresh, in-depth research study aimed at uncovering valuable insights into traveller preferences and evaluating performance year-over-year.



Our 2025 research, in collaboration with Bond Brand Loyalty, builds upon the insights gained from previous studies. This new phase includes an extensive review of the competitive landscape, qualitative in-depth interviews with our members, and quantitative research focused on traveller preferences across global markets, various tiers, and luxury customer segments.

While 70% of members continue to be active in 3 or more hotel loyalty programmes, their preferences associated with each vary across value propositions. For larger programmes, the scale and accessibility are valued, whereas with smaller programmes, stay benefits and quality of hotels are weighed higher.

What stood out is the increasing demand—across markets and segments—for simplicity, personalisation, an enhanced experience through membership, and seamless earning and redemption of rewards.

GHA DISCOVERY is already working on enhancements in these areas. The programme's increasing Net Promoter Score (NPS) suggests that its approach is resonating. However, like the broader industry, opportunities remain in providing more personalised experiences, ensuring members get the best rates at all times, and exploring further innovations in digital engagement.

In the following sections of this report, we will lay out the methodologies used and share the key insights from our research. We believe these findings will not only inform and direct our programme development but also contribute to the ongoing conversation about the value of loyalty in the hospitality industry.

## 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 2025 research, revealing how customer preferences have shifted since last year and what members value most from hotel loyalty programmes. We aim to extract deeper insights from the research and demonstrate how GHA DISCOVERY is an established loyalty programme with a highly competitive offering.



## QUALITY AND VALUE

Hotel loyalty programme members prioritise the quality of hotels and stay benefits over rewards and discounts. Among stay benefits, room upgrades continue to stand out as the most valued benefit, regardless of membership tier or market, followed closely by complimentary breakfast and member rates.



## PROGRAMME UNDERSTANDING

Programme comprehension and simplicity continue to be of utmost importance in order to drive member engagement and sustained loyalty. A key component of this is a seamless programme currency, including the earning and redemption mechanics members engage with. GHA DISCOVERY demonstrated positive improvements in this category, especially with regards to D\$ understanding, members feeling valued, and understanding of how to maximise value in the programme.



## RECOGNISE ME

Members continue to demonstrate a strong desire for benefits and communications that are hyper-tailored to their individual needs and interests. Many feel that the programmes they engage with can improve in this regard, demonstrating an opportunity to better leverage customer data to build deep emotional connections with members.

# Methodology

## Quantitative:

An online survey was sent to 1.5 million members in the GHA DISCOVERY database, covering all markets but ensuring representative response counts from 13 key markets, the four programme tiers and a luxury customer segment (defined as having stayed at an Ultratravel Collection property). The audience had also stayed at one or more GHA DISCOVERY hotels. The study was conducted between 23–31 January 2025.

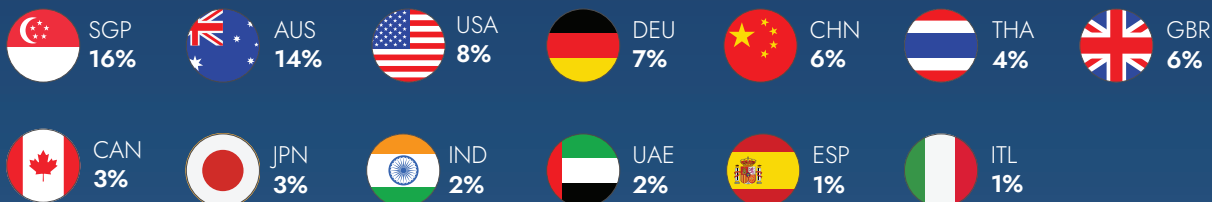
## Total respondents surveyed:

8,687

## Survey languages:

English, Spanish, German, Chinese, and Japanese

## Responses were collected globally, with more detailed analysis on 13 markets including:



## Member tier split:

Silver 22%  
Gold 16%  
Platinum 24%  
Titanium 38%

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

## Qualitative:

Five elite-level members selected by GHA based on their active engagement within the programme were interviewed about their opinions and preferences regarding GHA DISCOVERY and competitive programmes. Each interview was conducted virtually for up to 45 minutes between 4-8 November 2024, and members received a D\$ gift from GHA for their participation.

Global Hotel Alliance (GHA) is the world's largest alliance of independent hotel brands, with 45 brands and 850 hotels in 100 countries.

Its award-winning loyalty programme—GHA DISCOVERY—provides 30 million members with recognition, D\$ rewards and exclusive experiences across its hotels and partners, both with and without a stay. GHA DISCOVERY generated US\$2.7 billion in revenue and 11 million room nights in 2024.

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](https://globalhotelalliance.com) or [ghadiscovery.com](https://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 status**—upon joining the programme.
- **Gold status**—after staying two times, or spending USD 1,000.
- **Platinum status**—after staying 10 nights, spending USD 5,000 or staying at two brands.
- **Titanium status**—after staying 30 nights, spending USD 15,000 or staying at three brands.



## Silver

- Earn 4% back of your eligible spending in DISCOVERY Dollars (D\$)
- D\$ are valid for 12 months
- Member saving up to 10%
- Unlock D\$ cruise gifts, exclusive rewards and more with Partner Benefits
- Exclusive access to our Live Local offers
- Complimentary Wi-Fi



## Gold

- Earn 5% back of your eligible spending in DISCOVERY Dollars (D\$)
- D\$ are valid for 18 months
- Member saving up to 10%
- Unlock D\$ cruise gifts, exclusive rewards and more with Partner Benefits
- Exclusive access to our Live Local offers
- Complimentary Wi-Fi



## Platinum

- Earn 6% back of your eligible spending in DISCOVERY Dollars (D\$)
- D\$ are valid for 24 months
- Member saving up to 10%
- Unlock D\$ cruise gifts, exclusive rewards and more with Partner Benefits
- Exclusive access to our Live Local offers
- Enjoy room upgrade
- Late check-out until 3.00 p.m.
- Welcome amenity
- Complimentary Wi-Fi



## Titanium

- Earn 7% back of your eligible spending in DISCOVERY Dollars (D\$)
- D\$ are valid for 24 months
- Member saving up to 10%
- Complimentary breakfast available at participating hotel brands
- Unlock D\$ cruise gifts, exclusive rewards and more with Partner Benefits
- Exclusive access to our Live Local offers
- Double room upgrade
- Welcome amenity
- Early check-in from 11.00 a.m.
- Late check-out until 4.00 p.m.
- Guaranteed room availability up to 48 hours
- Status sharing with family and friends
- Complimentary Wi-Fi

# 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. At check-out, members simply put their D\$ towards their bill.

# Current Market Preferences

Across hotel loyalty programmes, members seek programmatic benefits that meet their functional needs, with access to hotel benefits being ranked most important with regards to the programmes they will join and engage with (54%). Quality of hotels ranked second (47%), indicating a desire for luxury hotel options, which now outranks the number of hotels (43%) and the ease of earning and redeeming rewards (43%). Members have clearly indicated the importance of the hotel selection and subsequent quality higher than financial benefits, demonstrating prioritisation of experience.



## Room upgrades

47%

## Free breakfast

16%

## Member rates/ discounted room rates

12%

## Rewards (D\$ or Points)

10%

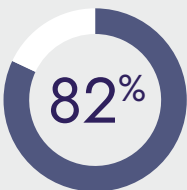
## PROGRAMME MECHANICS

Diving deeper into specific programme benefits, there is a clear division between stay components versus financial perks. Stay elements like room upgrades (highest ranking benefit at 47%), complimentary breakfast, late check-out and early check-in account for 73% of overall favourite hotel benefits. Meanwhile, financial benefits like member rates and rewards or points make up 23% of stated preferences. This aligns with the previous statements that access to benefits that enhance the hotel experience have a higher impact on driving customer behaviour.

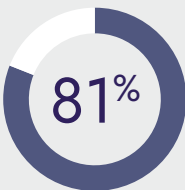
This is consistent with the delineation of benefits within GHA DISCOVERY and with Hotel Benefits making up 41% of top-rated perceived programme value, followed by D\$ Rewards (25%), perks like Member Rates (19%) and Live Local benefits (15%).

A new addition to the study this year surveyed members specifically on the likelihood to choose GHA DISCOVERY and book directly if offered a guaranteed room upgrade and complimentary breakfast. Nearly all members advised that they were highly likely to change their behaviour based on these proposed offerings, indicating an opportunity for higher conversion based on these benefits alone.

### LIKELY TO CHOOSE GHA DISCOVERY OVER OTHER PROGRAMMES

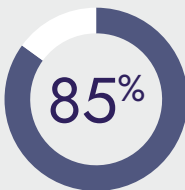


Guaranteed Room Upgrades

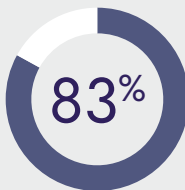


Complimentary Breakfast

### LIKELY TO BOOK DIRECTLY THROUGH GHA DISCOVERY



Guaranteed Room Upgrades



Complimentary Breakfast

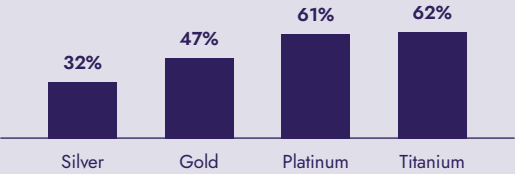
GHA DISCOVERY members continue to actively participate in multiple competitive programmes, with the majority citing over 3 other programmes they engage with.

OTHER PROGRAMME MEMBERSHIP (AMONG GHA DISCOVERY MEMBERS)

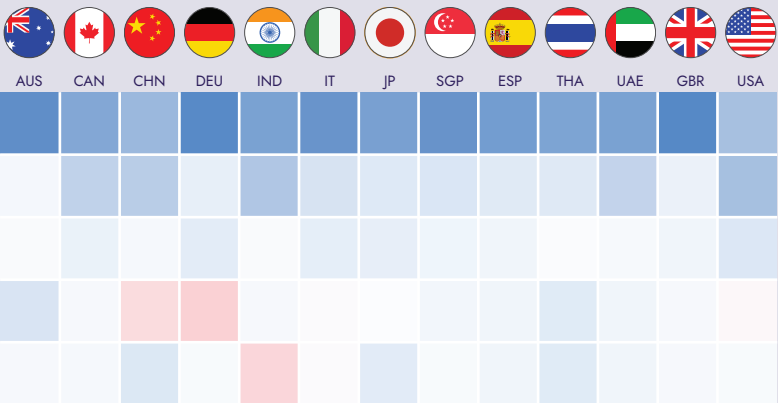
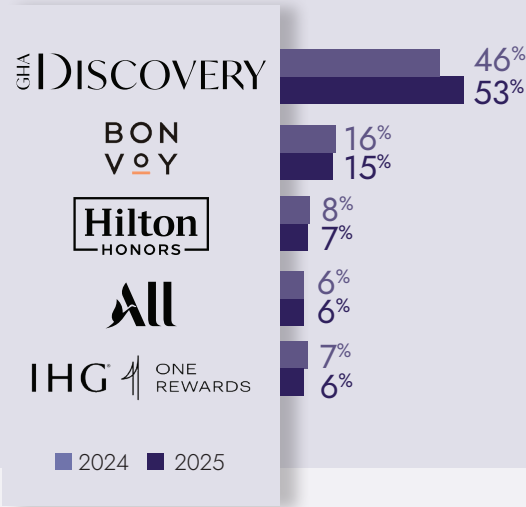


PREFERENCE FOR GHA

The overall preference for GHA DISCOVERY compared to those other programmes has increased 7 points to 53% since last year's study; however, there are still some even splits among key markets. For example, members in the US have an even (33% respectively) preference between GHA DISCOVERY and their other main programme.

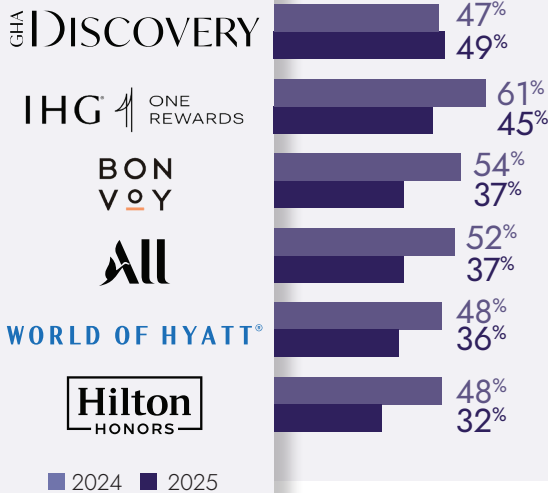


Preference continues to increase as tier status increases with a strong preference score of 62% for GHA DISCOVERY among Titanium members, compared to 13% preference for Bonvoy.



GHA DISCOVERY over-indexes on the ease and convenience of earning rewards, making members feel valued, and the ease of achieving higher status compared to other programmes, indicating that efforts to provide simplicity, convenience and educational components have been successful while effectively communicating programme benefits to members.

EASE OF EARNING/ SPENDING REWARDS



# GHA DISCOVERY Programme Specifically

The GHA DISCOVERY programme continues to be viewed as a luxury hotel programme, with many members citing a preference for GHA DISCOVERY over the likes of competitive programmes. GHA DISCOVERY has experienced significant improvements in NPS with a +6-point improvement overall. This includes noteworthy increases in the US (+15 points), the UK (+14 points), Australia (+14 points), Germany (+13 points), the UAE (+12 points), and Singapore (+9 points).

# 27 ▲ 6



Silver **-1** ▲ 16

Gold **15** ▲ 16

Platinum **32** ▲ 6

Titanium **44** ▼ 16

## PROGRAMME BENEFITS

With regards to the specific benefits of GHA DISCOVERY, the most valued elements remained the same as last year, with stay benefits like room upgrades, complimentary breakfast and late checkout ranked highest. Overall, member preferences remained consistent with nominal changes associated with new benefit additions.

# #1

Room  
Upgrades

# #2

Complimentary  
Breakfast

# #3

Late  
Check-out

## YEAR-OVER-YEAR IMPROVEMENTS

There are multiple areas where significant improvements have been made with regard to preferences and member ratings of GHA DISCOVERY. Most notably, increases in programme generosity, feeling valued, programme understanding, and ease of earning and redeeming D\$ marked the most significant improvements. A focus on communication efforts to increase comprehension can meaningfully contribute to overall value perception as members now understand how the programme delivers the most value and take opportunities to enhance the experience by leveraging the programme more effectively.

Understand benefits included.	<b>81%</b> ▲2
GHA DISCOVERY makes me feel valued.	<b>74%</b> ▲3
GHA DISCOVERY meets my needs.	<b>72%</b> ▲3
GHA DISCOVERY is generous.	<b>52%</b> ▲5

## LIVE LOCAL

Live Local benefits had 15% contribution to the most valued benefits within GHA DISCOVERY (-1% YoY). Dining benefits and no-stay-required amenity access are the most valued Live Local benefits for members, with special discounts, ability to earn and redeem D\$, and access to hotel facilities (e.g. pool, gym, lounge, etc.).

Dining Discount	3.5%
No-stay-required Amenity Access	3.1%
No-stay-required for D\$	2.9%
Spa Discount	1.3%
Curated Experience	1.0%
Member Meetups	0.7%

Key markets, including Australia, Germany, Singapore, the UK and the US, all noticed significant improvements in understanding of D\$ concepts, indicating the efficacy of programme education initiatives over the past year. However, while there is progress on D\$ comprehension, there is still an opportunity to improve overall programme understanding in India and the US, with just over half (58% and 56% respectively) indicating that they know how the programme works.

Core components of improvements of D\$ understanding are also demonstrated in the increases of key sentiments such as D\$ being a transparent rewards currency (+6% YoY), D\$ are easier to spend than points in other loyalty programmes (+7% YoY), and the 85% agreement that D\$ is an easy to understand rewards currency. There was also a slight increase in the amount of members valuing the ability to donate D\$ to charity (+3% YoY).

#### GHA DISCOVERY PROGRAMME IS CLEAR, AND I KNOW HOW IT WORKS

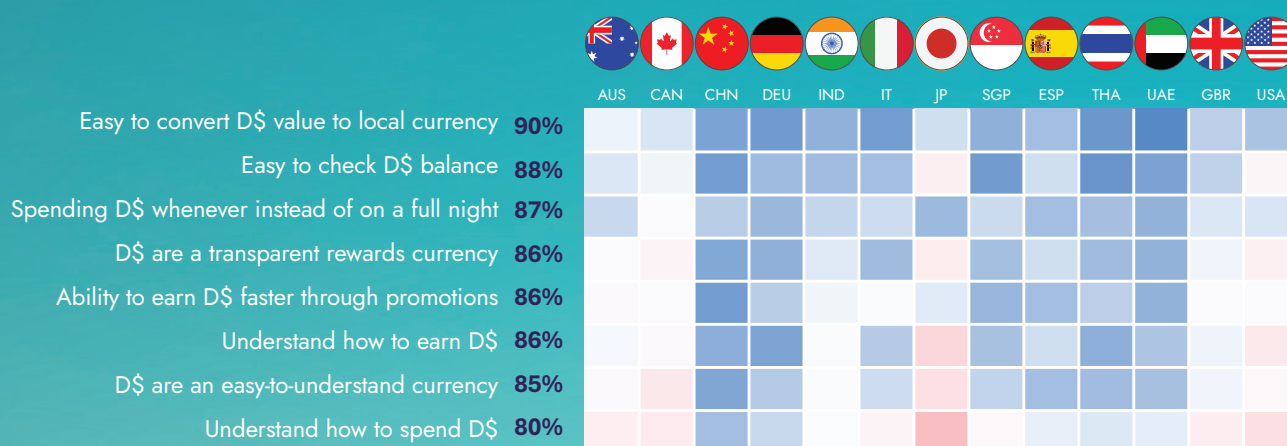


INDIA



US

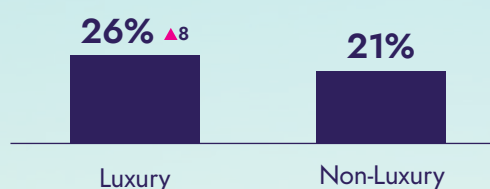
As D\$ comprehension has improved, so has perceived value, with noteworthy increases cited in ease of redemption compared to competitive programmes (+7% YoY). Members cited that they like being able to spend D\$ whenever they want instead of saving up for a full night (87%) and also noted that it is easy to convert the value of their D\$ to their local currency (90%, +3% YoY).



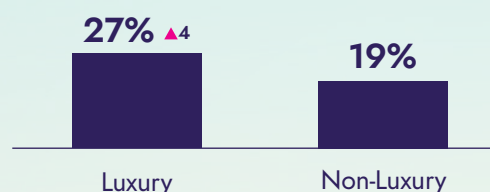
#### LUXURY VS NON-LUXURY

Overall, luxury customers were similar in their preferences and evaluations to non-luxury customers with nominal differences, including greater importance on the quality of the hotel (+4%) and room upgrade benefits (+6%). However, there were also some differences with regards to programme understanding, with 5% less luxury customers stating they have a clear comprehension of the GHA DISCOVERY value proposition and 6% not understanding what D\$ are worth. There also appears to be a comprehension barrier for luxury customers with regards to redeeming D\$, as 5% more than non-luxury customers are not sure how to spend their programme currency.

#### I AM NOT SURE HOW TO SPEND D\$



#### I DON'T UNDERSTAND HOW THE PROGRAMME WORKS



# Opportunities and areas for innovation

While there was a significant decline from last year in members struggling to understand D\$ value and how to receive benefits, the cited areas for improvement revolve around the number of destinations, D\$ expiry, member rates and personalisation. Of members who indicated GHA DISCOVERY was not meeting their needs, 46% expressed a desire for more GHA DISCOVERY locations in holiday destinations, and 40% sought an elongated D\$ expiry period.



Not enough GHA DISCOVERY hotels in the destinations I travel to



D\$ expire too quickly



Takes too long to earn a meaningful amount of D\$



Not enough variety of hotels for my budget



Booking directly through GHA is more expensive than other sites



Don't receive recognition for my loyalty status/tier at their hotels



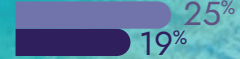
Difficult to receive benefits or rewards (D\$)



Don't understand how the programme works



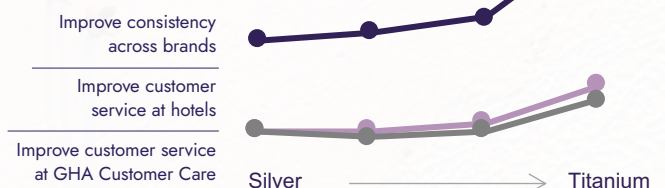
Don't understand what D\$ are worth



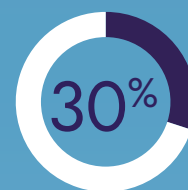
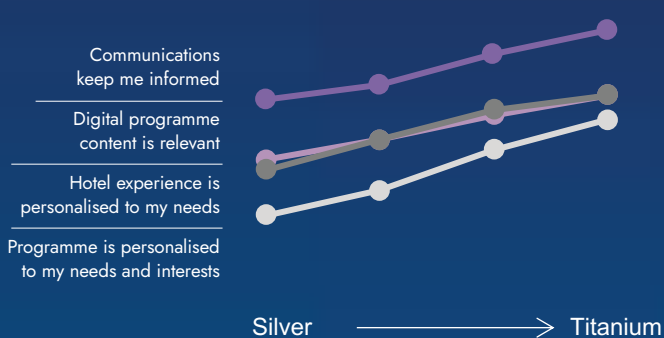
2024 2025

Regarding what to improve in the programme, members cited a desire for better member pricing on bookings, extended points expiry, and the ability to use D\$ while booking online. This is also reflected in the qualitative interviews and is consistent across markets.

From a tier perspective, elite members over-index in their desires for a consistent member experience across hotel brands and elevated customer service. The fulfilment of the programme experience during the member's stay creates the consistent perceived value to entrench the most loyal behaviours.



Another major area of opportunity lies within personalisation tactics. There is a strong desire for increased personalisation, particularly amongst higher-tier members. Of members surveyed, there is an indication that communications received are helpful and informative about how to best maximise available value for members (73% agreement). However, ~40% of elite members and ~50% of all members do not feel that the programme or the communications are tailored to their individual needs. This was also mentioned in the qualitative interviews with members stating that they are seeking to be acknowledged and recognised for their loyalty to GHA DISCOVERY when receiving communications or staying at a GHA hotel.



Likelihood of joining online member community

## A Sense of Community

One new concept that was tested in this year's study focused on community and member sentiment around the idea of an online community. Findings demonstrate that there is just moderate interest (30%) amongst members to join a community. Those who are interested in joining indicated that personalised travel recommendations from other members and opportunities to earn bonus D\$ for participation are among the highest valued features of a community like this.

These findings are particularly relevant in China and Singapore, with specific interest in the ability to complete quizzes and activities for bonus D\$. These tools must be carefully managed against fraud. There is a clear opportunity for further data acquisition through gamification tools, which could in turn provide valuable data to further enhance personalisation and enable collaboration through the sharing of recommendations, tips and tricks.

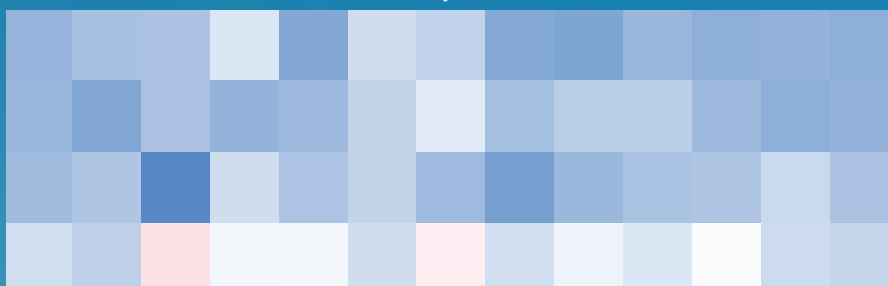


Earn bonus D\$ for posting within the online member community

Personalised travel recommendations from other members

Quick and fun quizzes and activities to win bonus D\$ or discounts

Post questions in the groups to ask for suggestions from fellow members





Thank you for reading the 2025 edition of What Travellers Want Most From Loyalty Programmes. As we conclude, we're gaining valuable insights into the evolving travel and hospitality trends, closely monitoring both competitive movements and how our programme is perceived. The findings have allowed us to collect more detailed, year-over-year data, highlighting the impact of our efforts and informing the ongoing refinement of the GHA DISCOVERY programme.

# In Conclusion

## What Travellers Want Most From Loyalty Programmes

**GLOBAL HOTEL ALLIANCE**  
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