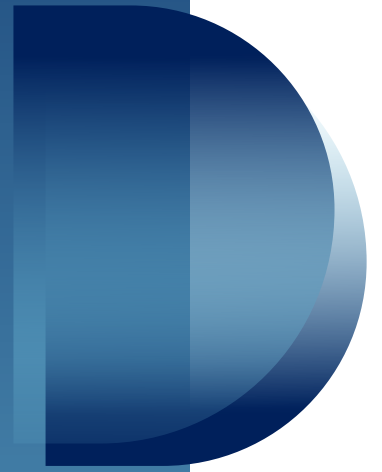


GHIA DISCOVERY

What Travellers Want Most From Loyalty Programmes



Introduction

In 2026, travellers are more active in hotel loyalty programmes than ever before. Their expectations are influencing how hotels design and deliver benefits. At GHA DISCOVERY, the loyalty programme shared by the 50 independent hotel brands of Global Hotel Alliance (GHA), with 1,000 hotels in 100 countries and 35 million members, we are committed to understanding our customers and the experiences they value most.

We just completed our annual loyalty-focused research, designed to uncover valuable insights into traveller preferences and evaluate our performance year over year. The 2026 research builds on the foundation of previous studies, combining a review of the competitive landscape and quantitative analysis across global markets, tiers, and luxury customer segments.

The findings highlight both industry-wide shifts and GHA DISCOVERY's continued momentum. Loyalty has become a core expectation, influencing hotel choice alongside quality, location, and price. Members are now active in an average of three to four hotel loyalty programmes, up from two to three last year. In this competitive context, GHA DISCOVERY has achieved significant gains in Net Promoter Score, rising 17 points in two years, as well as improvements in programme understanding and reward engagement. Members rate us highest for ease of earning and spending rewards, quality of hotels, and hotel benefits, with room upgrades standing out as our strongest differentiator.



In the following sections, we outline our methodology and share the key insights from this year's study. These findings will inform ongoing programme development and contribute to a broader conversation about customer-centricity in hospitality. We invite you to explore these results and consider how they can be applied to create loyalty experiences that meet and exceed the expectations of today's travellers.

Kristi Gole

Executive Vice President Strategy
Global Hotel Alliance

Executive Summary

The 2026 edition of the GHA DISCOVERY Loyalty Research builds on the findings from previous years to track how traveller preferences and loyalty behaviours are evolving. The Q1 2026 research highlights four shifts that are reshaping hotel loyalty and trends that matter for the entire hospitality sector.

TRAVEL AS PERSONAL TRANSFORMATION

Travel is increasingly viewed as a way to broaden horizons and create meaningful connections. Eight in ten travellers say their journeys change how they see the world and themselves. Japan, China, Italy, India, and the UAE report the highest agreement. Off-season travel for authenticity is now the most appealing experience. The combination of business and leisure travel is mainstream, with 76% globally extending work trips for leisure, and 87% in China doing so.

LOYALTY AS A CORE EXPECTATION

Loyalty programmes are no longer optional. 87% of travellers prefer hotels with a global loyalty programme, and members are now active in an average of three to four programmes, up from two to three last year. Benefits offered through loyalty programmes have risen sharply as a deciding factor in hotel choice, particularly among elite members, who place greater importance on them than any other attribute.

LESS IS MORE: GENEROSITY AND CORE BENEFITS WIN

Generosity remains the most valued programme attribute at 48%, far ahead of novelty at 7%. Stay-related benefits such as room upgrades, complimentary breakfast, and late check-out dominate member preferences. Luxury and elite members over-index on valuing upgrades, quality of hotels, and ease of rewards, while entry level members lean toward discounted rates. Across all markets, members are clear: they want the basics, but done exceptionally well.

GHA DISCOVERY'S MOMENTUM

GHA DISCOVERY continues to strengthen its position in the competitive loyalty landscape. Net Promoter Score has climbed 17 points in two years to +38, with increases across every market and stand-out gains in China (+33), India (+22), and Japan (+12). Members rate GHA highest for ease of earning and spending rewards, quality of hotels, and hotel benefits. Room upgrades are its strongest benefit, valued by 59% of members—19 points ahead of the next competitor.

Methodology

Quantitative:

An online survey was sent to approximately 2 million members in the GHA DISCOVERY database, covering all markets globally, ensuring sufficient coverage in 13 key markets and 4 programme 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 22 January and 2 February 2026.

Total respondents surveyed:

9,175

Survey languages:

English, Spanish, German, Chinese, and Japanese

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



Member responses, by segment:

Luxury* 651
Non-Luxury 7,621

Member responses, by tier:

Silver 2,018
Platinum 1,644
Gold 1,210
Titanium 4,303

*Luxury customer segment is defined as having stayed at an Ultratravel Collection property.

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**
when you stay two times or spend USD 1,000.
- **Platinum status**
after staying 10 nights or spending USD 5,000 or staying at two brands.
- **Titanium status**
after staying 30 nights or spending USD 15,000 or staying at three brands.

	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
Member & Incentive Savings	Earn D\$ on Eligible Purchases*	4%	5%	6%
	Spend D\$ on Eligible Purchases*	●	●	●
	D\$ Expiry	12 Months	18 Months	24 Months
	Member Rates — Save 10% or more**	●	●	●
	Exclusive Offers	●	●	●
Stay Benefits	Complimentary Wi-Fi	●	●	●
	Room Upgrade***			Double
	Welcome Amenity			●
	Early Check-in**			11am
	Late Check-out***			2pm
Member Access	Guaranteed Room Availability 48hrs prior***			●
	Complimentary Breakfast**			●
	Additional Brand Benefits			●
	Experiences	●	●	●
	Local Offers	●	●	●
Partner Benefits	●	●	●	
Transfer, Buy or Donate D\$	●	●	●	
Status Sharing			●	

*Terms & Conditions apply **At participating hotels ***Subject to availability ghadiscovery.com

Key Emerging Travel Trends

TRAVEL AS PERSONAL GROWTH

Travellers are increasingly choosing experiences that broaden horizons and create deeper connections with destinations. Off-season travel for authenticity is the most appealing experience globally (36%), followed by destination immersion (25%). Japan shows the highest preference for immersion (34%), while Australia and the US lead on off-season travel (41%).

OFF-SEASON TRAVEL FOR AUTHENTICITY AND DESTINATION IMMERSION ARE THE MOST APPEALING EXPERIENCES.



Travelling in the off-season to avoid crowds and have a more authentic experience.

Spending time to get immersed in destinations.

Going off the beaten path to more unique destinations.

Paying more for exclusive or managed access to experiences where it's guaranteed to have a smaller (or no) crowd.

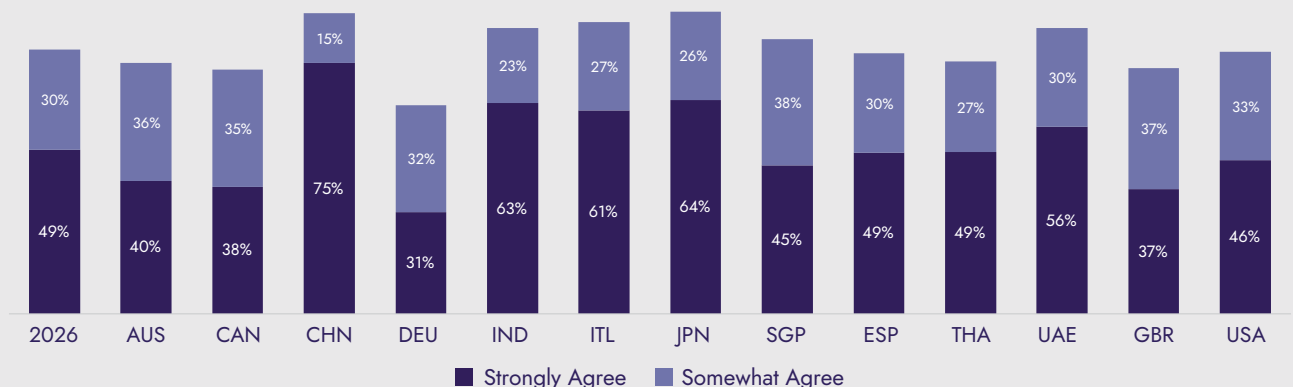
An itinerary created by a local.

	AUS	CAN	CHN	DEU	IND	ITL	JPN	SGP	ESP	THA	UAE	GBR	USA
Travelling in the off-season to avoid crowds and have a more authentic experience.	41%	45%	27%	39%	28%	33%	25%	38%	29%	37%	34%	38%	41%
Spending time to get immersed in destinations.	28%	23%	24%	19%	27%	20%	44%	25%	31%	25%	22%	23%	23%
Going off the beaten path to more unique destinations.	12%	19%	21%	19%	17%	24%	17%	14%	16%	15%	24%	13%	18%
Paying more for exclusive or managed access to experiences where it's guaranteed to have a smaller (or no) crowd.	15%	11%	17%	19%	21%	12%	13%	17%	13%	17%	16%	20%	12%
An itinerary created by a local.	5%	3%	12%	4%	7%	10%	1%	6%	10%	7%	4%	6%	7%

A majority (80%) agree they choose travel that helps them grow, change, or see the world and themselves differently, with Japan (91%), China (90%), and Italy (88%) reporting the strongest agreement.

In China, 75% strongly agree, the highest top-box score across markets. This reflects a shift from 'vacation as relaxation' toward travel as personal transformation.

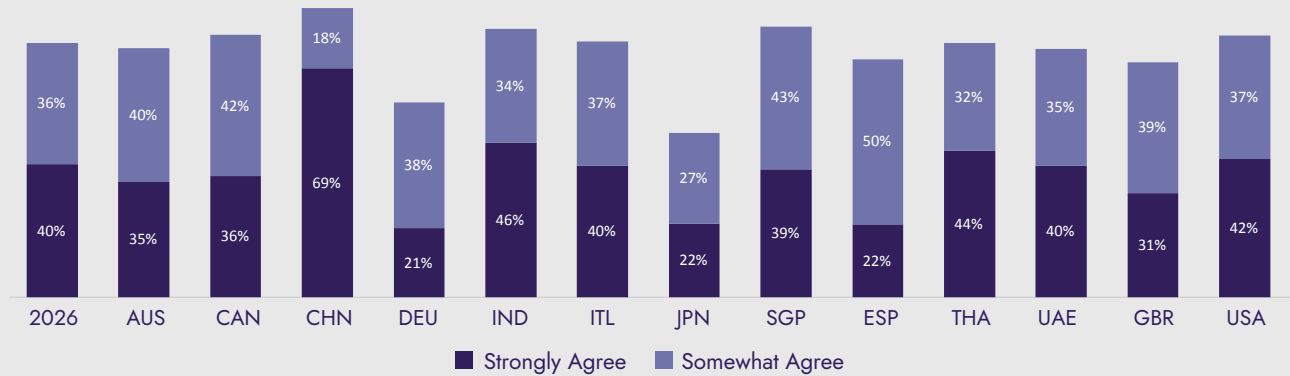
I CHOOSE TRAVEL EXPERIENCES THAT HELP ME GROW, CHANGE, OR SEE THE WORLD—AND MYSELF—DIFFERENTLY



The blending of business and leisure travel is also mainstream. Three-quarters (76%) of business travellers extend work trips for leisure, with China (87%), India (81%), and Singapore (81%) leading. Japan and Germany are notable outliers at 49% and 58%,

respectively. This trend suggests loyalty programmes that offer benefits relevant to both business and leisure stays can capture a greater share of member engagement.

THREE-QUARTERS OF BUSINESS TRAVELLERS GLOBALLY ARE LIKELY TO EXTEND WORK TRIPS WITH LEISURE TIME ('BLEISURE')

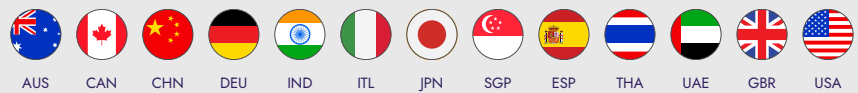
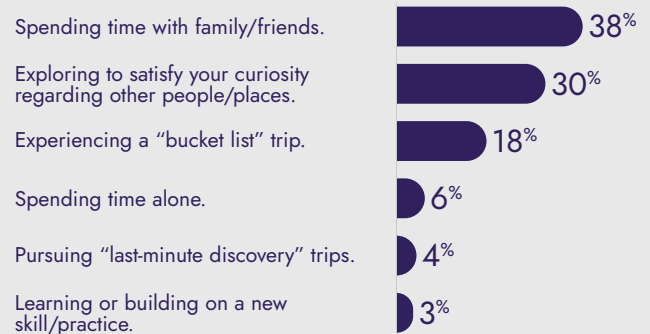


TOP MOTIVATIONS FOR TRAVEL

Spending time with family and friends is the leading driver globally (38%), followed by exploring curiosity about other cultures and places (30%). Bucket-list trips (18%) rank third, while solo time (6%), last-minute discovery trips (4%), and learning a new skill (3%) are more niche.

Market variations are pronounced. India leads on family and friends time (49%), Japan on cultural curiosity (45%), and Spain on bucket-list trips (30%). These preferences highlight the importance of benefits that support shared experiences, such as upgrades to larger rooms, family-friendly amenities, and curated local activities, along with opportunities for cultural exploration.

SPENDING TIME WITH FAMILY/FRIENDS AND CULTURAL CURIOSITY ARE THE TWO DOMINANT TRAVEL MOTIVATIONS GLOBALLY.



	AUS	CAN	CHN	DEU	IND	ITL	JPN	SGP	ESP	THA	UAE	GBR	USA
Spending time with family/friends.	34%	35%	31%	31%	49%	45%	35%	44%	36%	37%	43%	35%	31%
Exploring to satisfy your curiosity regarding other people/places.	35%	38%	19%	39%	23%	45%	24%	30%	35%	23%	28%	39%	41%
Experiencing a "bucket list" trip.	22%	19%	21%	16%	16%	8%	30%	17%	17%	21%	11%	17%	20%
Spending time alone.	4%	6%	11%	4%	4%	0%	7%	6%	3%	10%	6%	5%	4%
Pursuing "last-minute discovery" trips.	3%	2%	9%	8%	5%	2%	2%	2%	4%	4%	4%	2%	2%
Learning or building on a new skill/practice.	2%	2%	9%	2%	3%	0%	2%	1%	5%	5%	7%	2%	2%

PAIN POINTS IN TRAVEL

Flight delays and cancellations are the most frustrating aspect of travel, cited across all markets. Logistics and planning complexity rank second, followed by airport security stress. These operational and travel process issues outweigh hospitality-specific concerns, such as accommodation check-in or poor service.

While hotels and accommodation rank lowest among pain points, travellers still cite occasional frustrations with service quality, unmet expectations, and cost or value concerns. This reinforces the need for loyalty programmes to differentiate on operational excellence and guest experience consistency, ensuring that the hospitality component of the trip stands out positively against the journey itself.



Loyalty Programme Trends in 2026

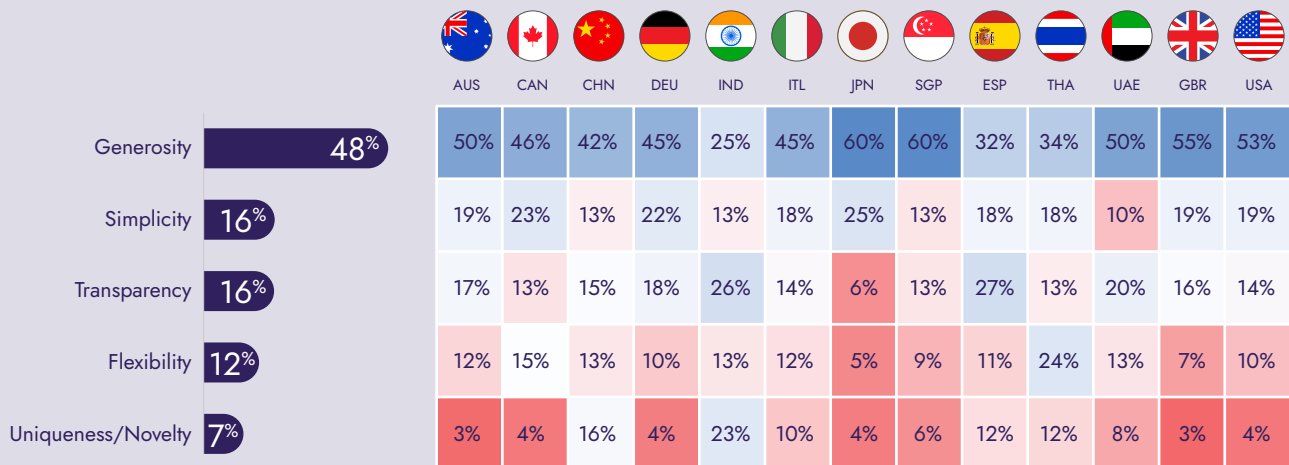
Loyalty programmes have become a decisive factor in hotel choice, with importance rising across nearly all markets. In India, Japan, and Singapore, more than 80% of travellers say loyalty benefits influence their booking decision. Germany remains the least swayed at 52%.

This shift signals that hotels, whether global chains or independent brands, must compete on benefits and value, not only on brand, price or location.

ATTRIBUTES DRIVING LOYALTY

When looking at specific programme attributes, generosity continues to stand out as the top driver of preference, cited by 48% of members globally. Simplicity and transparency follow at 16% each. In Japan and Singapore, generosity scores reach as high as 60%, reflecting the appeal of clear, tangible rewards in markets where travellers are selective about programme participation.

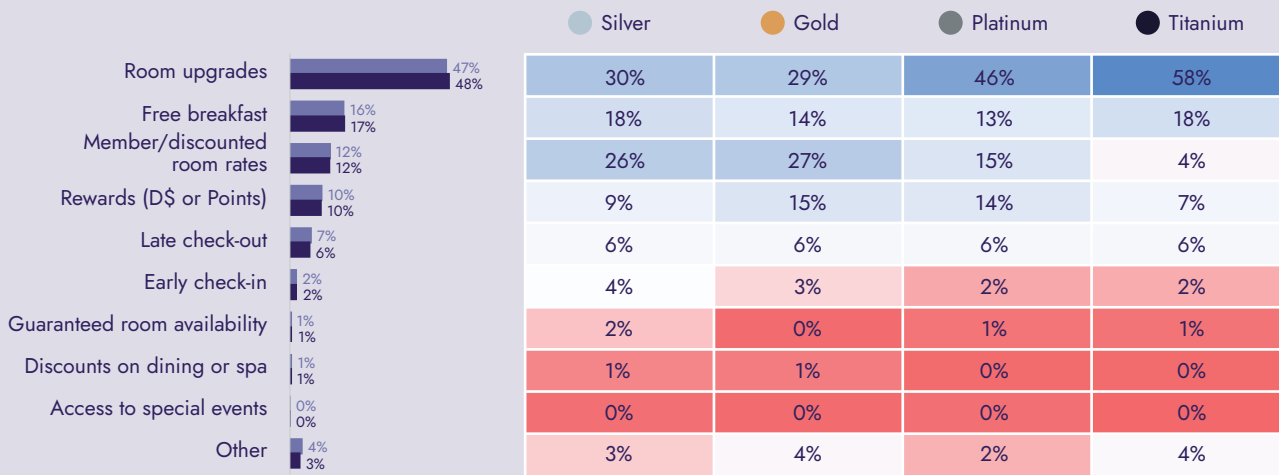
GENEROSITY (48%) IS CLEARLY THE MOST VALUED LOYALTY PROGRAMME ATTRIBUTE ACROSS NEARLY ALL MARKETS.



There is a clear division between stay-related components and financial perks. Stay elements such as room upgrades, complimentary breakfast, late check-out, and early check-in account for the majority of favourite benefits across all programmes, with upgrades

ranking highest at 59% among GHA DISCOVERY members. Financial benefits like member rates and rewards currency make up a smaller share, showing that enhancements to the on-property experience have more influence on member behaviour.

FAVOURITE HOTEL BENEFIT/PERK (ACROSS ALL PROGRAMMES)

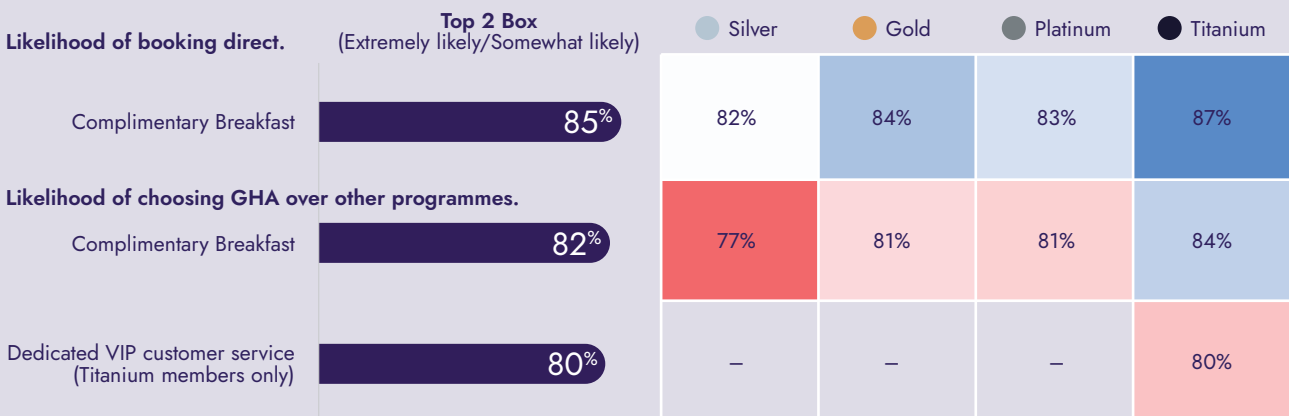


BOOKING BEHAVIOUR SHIFT

The behavioural impact of selected benefits is significant. Complimentary breakfast, when offered for booking direct, increases the likelihood of direct booking to 85% and programme choice to 82%. VIP customer service for Titanium members influences 80%

to choose GHA DISCOVERY over competitors. While scale and network size remain factors, loyalty decisions are increasingly shaped by targeted, high-impact benefits that members can clearly understand and use.

COMPLIMENTARY BREAKFAST OFFERS HAVE THE GREATEST IMPACT ON INFLUENCING ELITE MEMBERS' BOOKING BEHAVIOUR. DEDICATED VIP CUSTOMER SERVICE HAS A HIGHER IMPACT ON TITANIUM MEMBERS THIS YEAR (+5 PTS).

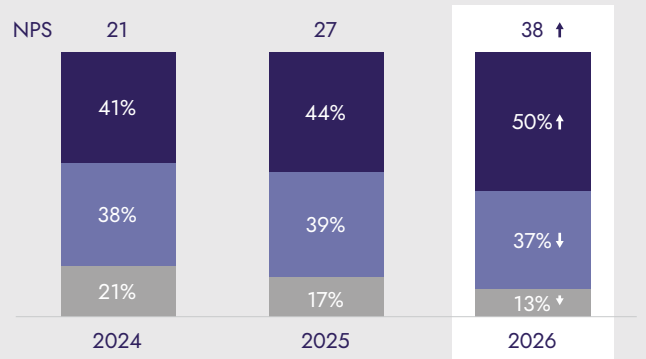


GHA DISCOVERY Performance and Competitive Position

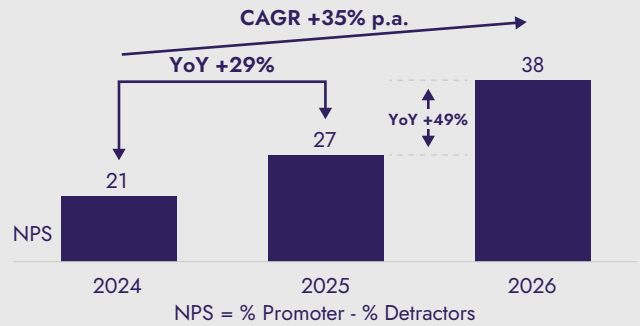
NPS GROWTH

GHA DISCOVERY's Net Promoter Score has risen 17 points over the past two years to +38, showing stronger member advocacy across all markets. Gains are most pronounced in China (+33 points, +92%), India (+22 points, +76%), Japan (+12 points, +100%), and Spain (+12 points, +52%). Titanium members show a +13-point increase, with Gold members up +9 points. These improvements suggest that recent programme enhancements, including expanded hotel coverage, tier-specific benefits, and increased visibility of DISCOVERY Dollars, are resonating with members.

GHA DISCOVERY NPS HAS INCREASED FROM +21 TO +38 OVER THE PAST 2 YEARS (+17 PTS JUMP).



■ Promoter (9 to 10) ■ Passive (7 to 8) ■ Detractor (0 to 6)

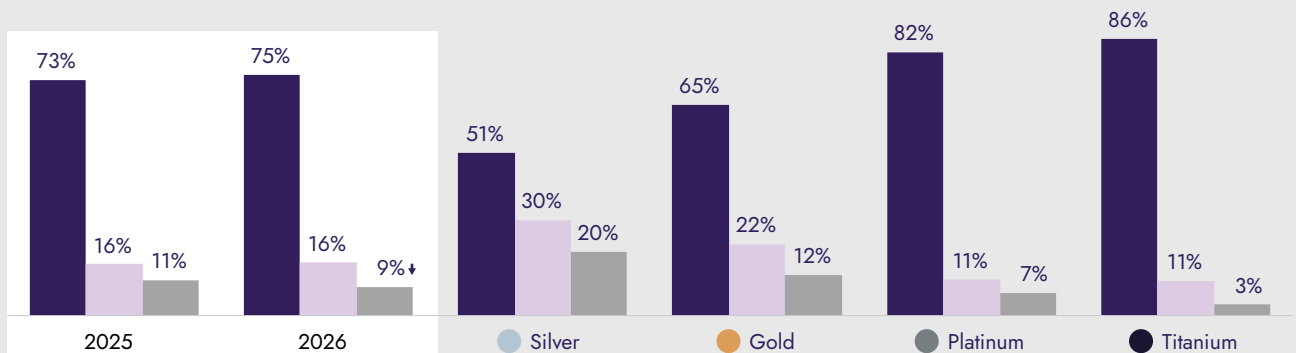


PROGRAMME UNDERSTANDING

Three-quarters (75%) of members understand they can earn and redeem rewards across all brands in the GHA DISCOVERY network. Awareness is highest in Singapore (87%), Thailand (83%), and Italy (82%),

and lowest in the US (60%). Titanium members report 86% comprehension, compared to 51% among Silver members. Stronger awareness correlates with higher engagement and cross-brand booking.

PROGRAMME UNDERSTANDING REMAINS STRONG.



■ It is clear, and I already knew how it worked.
 ■ It is clear, but I was not aware that I could earn and spend D\$ across all GHA DISCOVERY hotel brands.
 ■ It is not clear, and I don't understand the relationship between GHA DISCOVERY and the individual hotel programmes within it.



COMPETITIVE DIFFERENTIATORS

Against competitors, GHA DISCOVERY leads in ease of earning and spending rewards, quality of hotels, and hotel benefits. Room upgrades are the strongest differentiator, valued by 59% of members—19 points ahead of the next competitor. Complimentary breakfast ranks second at 11%, with late check-out third. Larger chains often lead on network size, but GHA DISCOVERY's appeal lies in delivering high-impact stay benefits and a transparent rewards currency.

VALUE STRUCTURE AND PERCEIVED BENEFITS

Members' perception of value aligns with the programme's design. Hotel Benefits account for 43% of perceived programme value, followed by D\$ Rewards at 25%, Member Perks at 17%, and Live Local offers at 15%. This focus on enhancing the stay experience drives stronger engagement than purely financial perks. But it's the combination of all four elements that create the overall value for members.

Competitive advantage comes from aligning benefit design with member priorities and ensuring programme understanding, not just expanding network size.

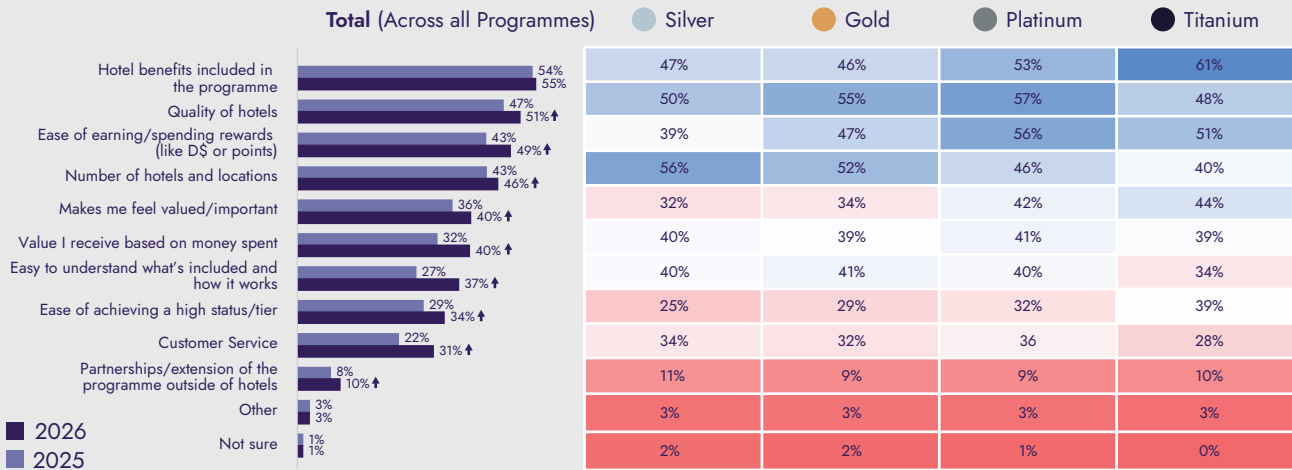
Benefit Preferences by Tier

Across all hotel loyalty programmes, benefit preferences vary significantly by tier, reflecting both the value of elite recognition and the priorities of newer members. Titanium members over-index on stay-related benefits, with room upgrades ranked highest, followed by complimentary breakfast and late check-out. Silver members prioritise member rates and the number of

hotels in the network, indicating that affordability and breadth of choice are more influential early in the loyalty journey.

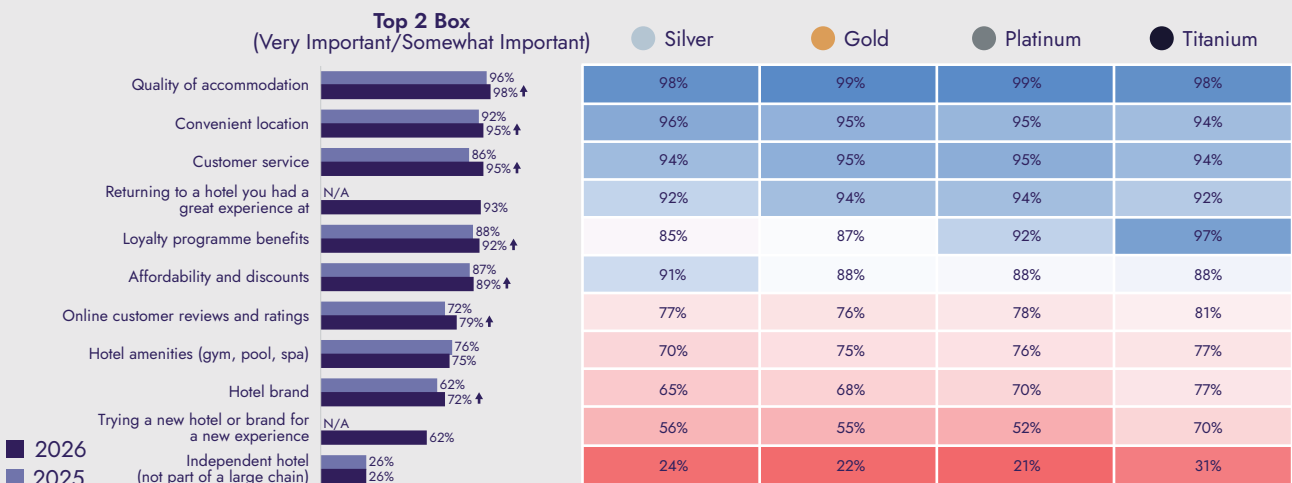
Platinum members show a balanced preference for both upgrades and rewards currency, while Gold members lean toward dining discounts and early check-in. This segmentation reinforces the importance of tailoring benefit communication by tier, highlighting elite exclusives for higher tiers and practical value for entry tiers.

HIGHER-TIER MEMBERS CONTINUE TO FOCUS MORE ON BENEFITS AND EARNING/SPENDING REWARDS.



When choosing a hotel, quality of accommodation and location are universal priorities across all tiers, but loyalty programme benefits stand out as a key differentiator among elite tiers—climbing from 85% among Silver members to 97% among Titanium.

ELITE MEMBERS OVER-INDEX ON THE IMPORTANCE OF LOYALTY PROGRAMME BENEFITS WHEN CHOOSING A HOTEL.

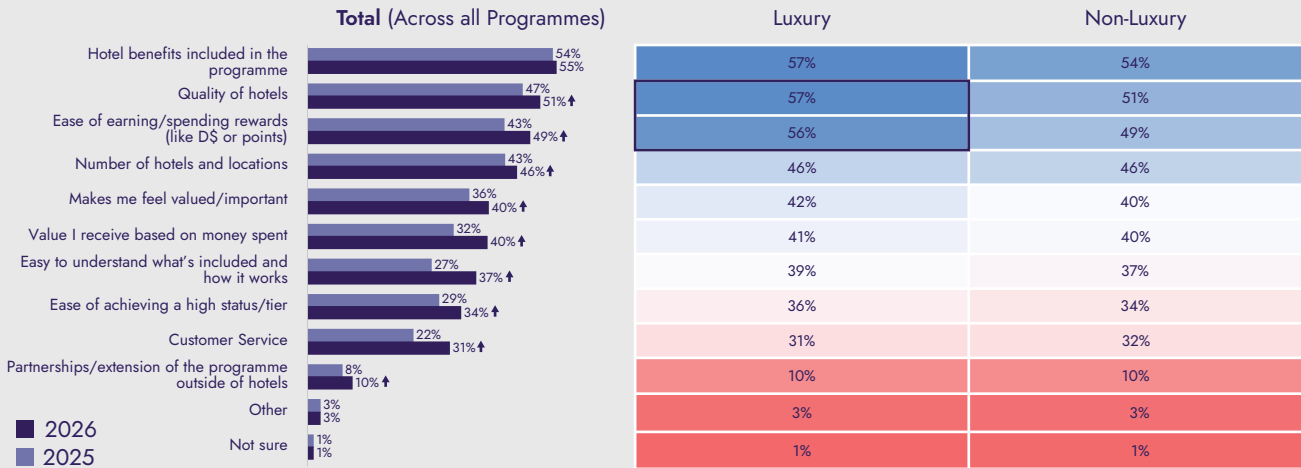


BENEFIT PREFERENCES IN LUXURY VS NON-LUXURY SEGMENTS

Luxury segment members place greater emphasis on quality and ease of rewards than non-luxury members—57% cite hotel quality as a top attribute, and 56% highlight ease of earning and spending

rewards. This reflects a preference for premium experiences and straightforward reward mechanics, which align with GHA DISCOVERY's transparent D\$ currency.

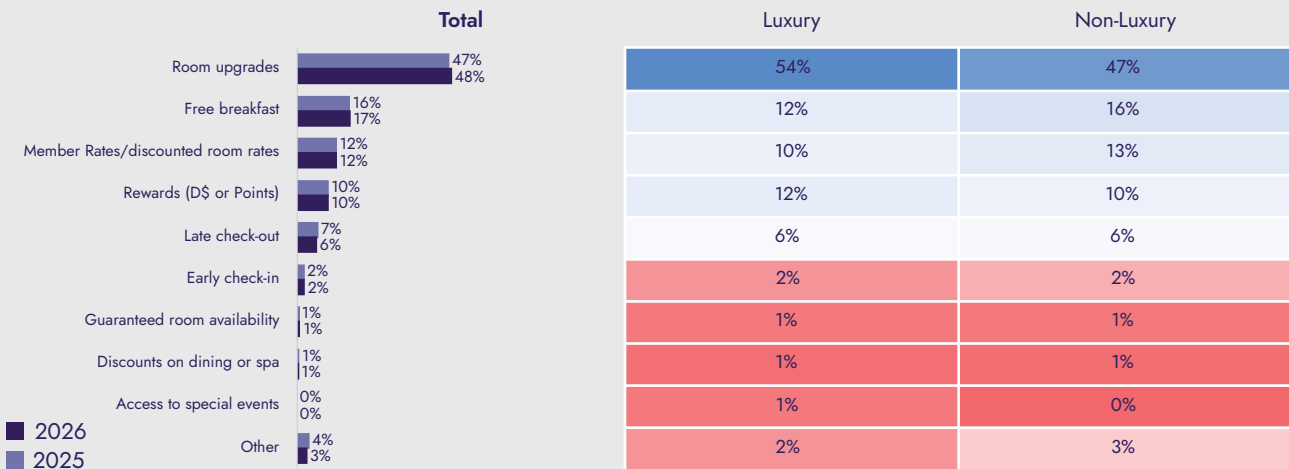
LUXURY MEMBERS PLACE MORE VALUE ON QUALITY OF HOTELS AND EASE OF EARNING/SPENDING REWARDS IN THEIR PREFERRED PROGRAMME.



Luxury members over-index on valuing room upgrades (54% vs 47% for non-luxury), followed by complimentary breakfast and late check-out. Non-luxury members place slightly more emphasis on member rates and rewards currency, indicating

greater sensitivity to financial value. These differences suggest that luxury customers respond more to enhancements in the stay experience, while non-luxury members may prioritise discounts and flexibility in rewards redemption.

LUXURY CUSTOMERS OVER-INDEX IN CITING ROOM UPGRADES AS THEIR FAVOURITE PERK OF THEIR PREFERRED HOTEL PROGRAMME.



Future Outlook and Opportunities

PERSONALISATION AS A COMPETITIVE DIFFERENTIATOR

Personalisation remains one of the most talked-about drivers of loyalty in hospitality. While all four personalisation-related metrics declined slightly year-over-year, this is less about programmes doing less and more about travellers expecting more. Travellers want communications that reflect their preferences and travel history, tier-specific recognition on-property, and tailored recommendations for experiences, dining, and local activities.

For hotels, these findings signal clear opportunities. Using guest data to inform both pre-stay and in-stay interactions, training staff to deliver tier-specific recognition, and tailoring offers to the timing and context of a guest's trip can make loyalty benefits feel more personal. This type of targeted delivery is likely to become a key differentiator as expectations continue to rise.

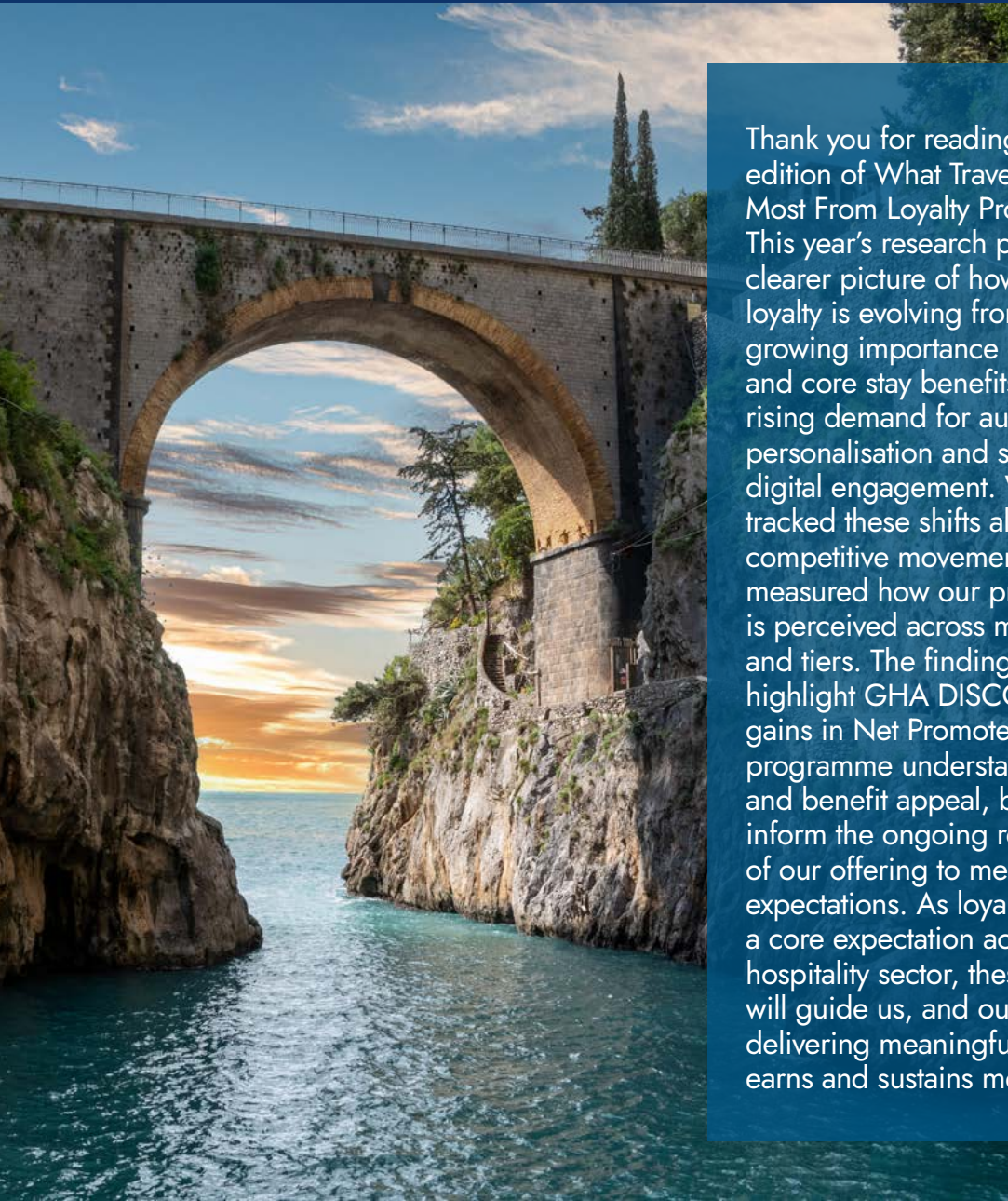
AI AND DIGITAL TOOLS SHAPING THE GUEST JOURNEY

Artificial intelligence is poised to play a bigger role in loyalty and guest engagement. Half of travellers believe AI-powered features could make their membership more valuable, with interest especially high in Asia-Pacific markets such as China, India, and Thailand. Potential applications include dynamic itinerary building, predictive benefit suggestions, and proactive service recovery. More broadly, digital tools that make planning, booking, and redeeming rewards easier are likely to become standard expectations rather than optional extras.

COMMUNITY AND EXPERIENTIAL LOYALTY

Although only 14% of travellers are currently active in member-only communities, interest in exclusive experiences and peer-to-peer engagement is growing. For hotels, this represents an opportunity to extend loyalty beyond the transaction by creating spaces, whether digital or in-person, where members can connect, share recommendations, and access unique events. This approach aligns with a wider movement in hospitality toward experiential loyalty, where the emotional connection to a brand can be as valuable as the financial perks.





Thank you for reading this edition of What Travellers Want Most From Loyalty Programmes. This year's research provides a clearer picture of how traveller loyalty is evolving from the growing importance of generosity and core stay benefits, to the rising demand for authentic personalisation and seamless digital engagement. We've tracked these shifts alongside competitive movements and measured how our programme is perceived across markets and tiers. The findings not only highlight GHA DISCOVERY's gains in Net Promoter Score, programme understanding, and benefit appeal, but also inform the ongoing refinement of our offering to meet changing expectations. As loyalty becomes a core expectation across the hospitality sector, these insights will guide us, and our partners, in delivering meaningful value that earns and sustains member trust.

In Conclusion

About GHA and GHA DISCOVERY

Global Hotel Alliance (GHA) is the world's largest alliance of independent hotel brands with 50 brands and 1,000 hotels in 100 countries.

Its award-winning loyalty programme—GHA DISCOVERY—provides 35 million members recognition, D\$ rewards and exclusive experiences across its hotels and partners, both with and without a stay. GHA DISCOVERY generated US\$3.2 billion in revenue in 2025.

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.