

# The Growth of Subscription Loyalty Programmes in the Americas

February 2023

# INTRODUCTION

Scope

Executive summary

# LOYALTY'S POST-PANDEMIC OPPORTUNITY

Hospitality loyalty's moment of opportunity

# THE PANDEMIC'S IMPACT ON HOSPITALITY LOYALTY

How the pandemic has changed hospitality loyalty

The decline of business travel and growth of leisure

Inflation creates challenges and opportunities for loyalty

Shift to payments-based loyalty

Digital ordering gains drive re-investment in loyalty

# SUBSCRIPTION SERVICES

Defining subscription services

Subscriptions SWOT analysis

Subscriptions address challenges with loyalty programmes

Subscriptions drive high value from a small customer group

Panera creates a loss leader subscription

Uber One subscription replaces company's traditional loyalty programme

LATAM uses subscription to support traditional loyalty programme

Complex terms cause Tripadvisor Plus to underperform expectations

Alaska Airlines promotes subscription as counterbalance to inflation

# **BEST PRACTICES**

Low-priced services drive the most successful subscriptions

Key traits for successful subscriptions

Consumer trends will fuel subscriptions' growth in 2023

Future considerations for subscriptions-based loyalty

# **KEY FINDINGS**

Key findings

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