



Mapping the future of APAC travel

How demand, traveller expectations
and technology are reshaping
the region's travel market





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Introduction

APAC travel is full of opportunity and complexity

Asia-Pacific (APAC) is one of the fastest-growing regions in global travel, but it is also one of the most complex. Fragmented markets, localised content needs, diverse payment and loyalty preferences, and the rise of new booking behaviours all make growth harder to capture. Travellers' expectations can differ significantly from one market to the next. As a result, it's challenging to build a single strategy that works across the entire region.

For travel businesses, growth in APAC requires more than recognising the scale and the opportunity. It requires the ability to respond quickly to changing traveller expectations while delivering experiences that feel relevant, flexible and easy to navigate across markets.

To better understand how businesses within the region are navigating this shift, Expedia Group commissioned a study with Censuswide to survey 1,250 travel professionals across Australia, China, India, Japan and Thailand.

The research explores three key questions: where demand is heading, how traveller expectations are changing, and how prepared travel businesses are across technology, AI, payments and partnerships.

Read on for a closer look at how travel businesses across APAC are adapting to changing traveller behaviour, approaching AI and technology investments, and preparing for the future of travel across the region.

Methodology

RESPONDENTS

1,250
travel professionals

SEGMENTS

Online travel agencies (OTAs), hotels, air, travel management companies (TMCs), transport, loyalty programmes and financial services

MARKETS

Australia
China
India
Japan
Thailand

FIELDED

26 March–1 April 2026



Executive summary

1

APAC travel demand is accelerating

Across APAC, 65% of travel professionals expect demand to grow over the next two to three years. India and Australia are among the most optimistic markets, with confidence spanning luxury, budget and business travel.

2

Travellers want more payment methods

Local and diverse payment options are increasingly important to APAC travellers, with more than 70% of respondents ranking buy now, pay later, global credit and debit cards, and loyalty points or miles among the top payment methods.

3

Local content gaps are creating friction

Travel businesses struggle to create content that reflects local and cultural nuances, even as travellers expect more relevant content, imagery and amenities. Many businesses say content gaps are holding them back.

4

AI usage in APAC is non-negotiable

AI is top of mind across the region. 79% already use it in at least one area of their business and 97% plan to use it going forward. Customer service, marketing, merchandising and search are leading use cases for travel businesses.

5

Tech priorities are outpacing systems

Over the next 12–24 months, businesses are prioritising richer content, AI-powered pricing and partner APIs. But one-third of respondents say integration complexity and finding trusted partners remain key barriers.

6

Operational resilience is top of mind

One core challenge stands out across travel businesses: building capacity to keep up with growing traveller demand. Success will depend on having the systems, support and partnerships needed to adapt and grow.

The future of APAC demand

Increased travel demand in APAC is no longer a far-off possibility. It is taking shape now and travel businesses are already planning for it. Nearly two-thirds of respondents (65%) expect overall APAC demand for their business to increase over the next two to three years.

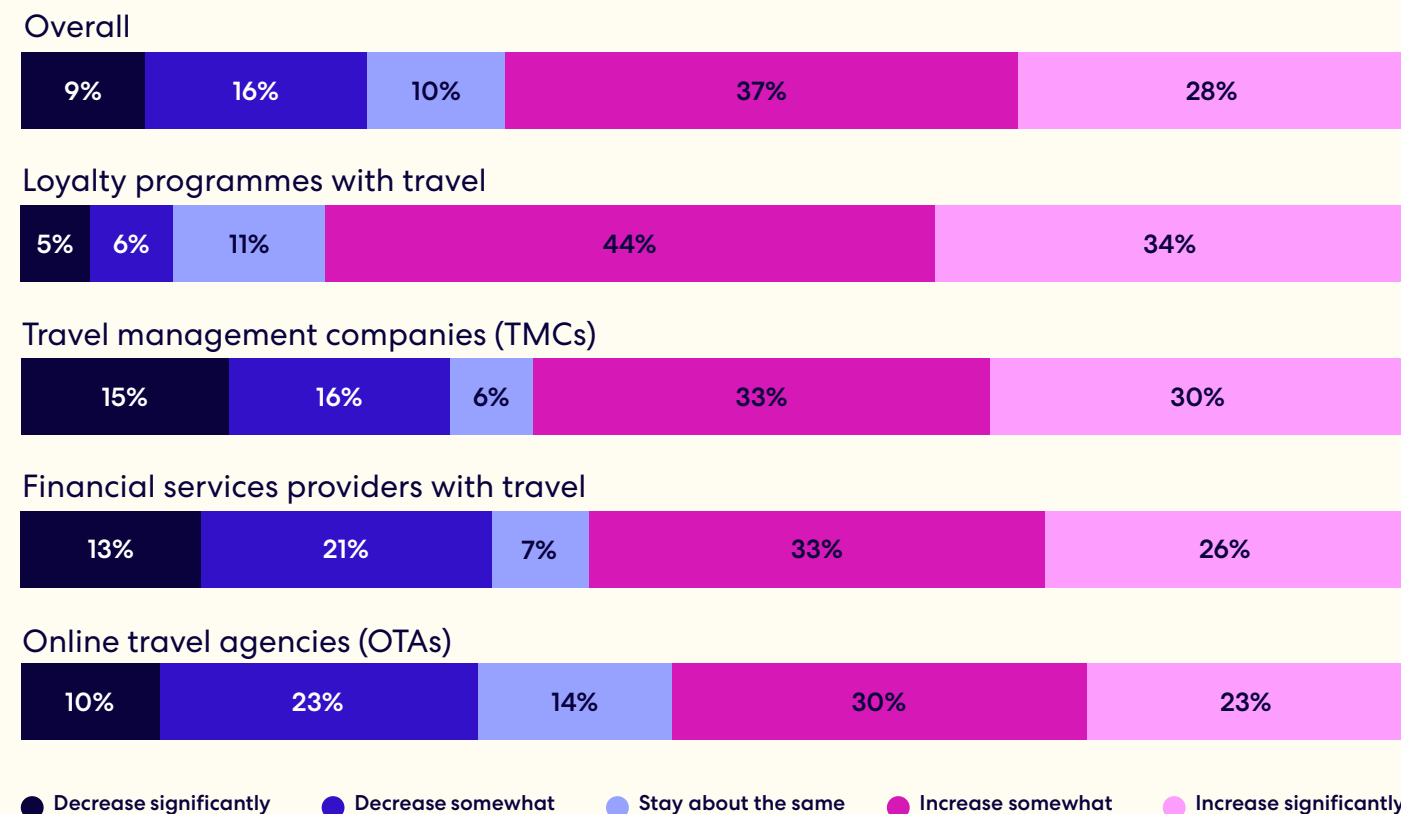
Confidence in APAC's outlook extends across the industry, rather than being concentrated in any one segment. While expectations for growth are strong across business types, loyalty programmes stand out in particular, with 78% of loyalty programme professionals expecting demand to increase.



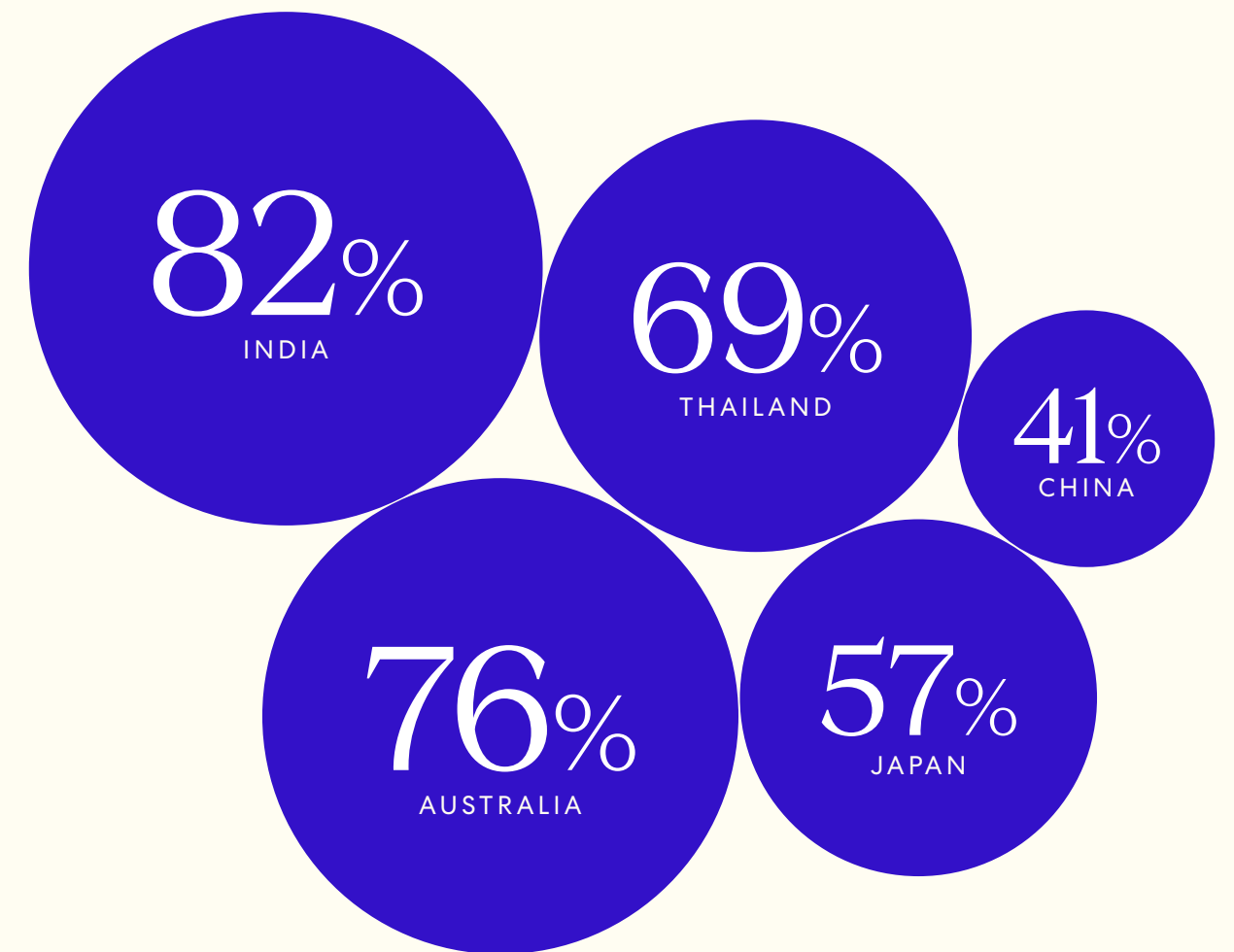
65%

expect overall APAC demand for their business to increase in the next 2-3 years.

Overall demand outlook by business type



Over the next 2-3 years, how, if at all, do you expect overall demand for your travel business in APAC to change?



At the same time, growth is far from uniform across the region. Some markets are betting more heavily on demand growth than others, with confidence especially strong in India and Australia.

Whether travellers are looking for a budget-friendly getaway, a luxury retreat, a business trip or something in between, demand is growing across APAC. But that growth is not concentrated in one type of travel. It spans leisure, business and regional trips, creating a broader set of opportunities for travel businesses across the region.

Luxury leisure travel stands out, with 63% of travel professionals expecting growth in that segment. More than six in ten respondents expect increases in budget-focused leisure travel, bleisure travel and intra-APAC regional trips, showing that demand is rising across both premium and value-driven parts of the market.

Travel professionals expect growth in luxury leisure travel

63%

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Fastest growing segment by market

Country-level research shows which travel segment is expected to see the strongest growth in each market.

AUSTRALIA
Luxury leisure travel

71%

CHINA
Luxury leisure travel

48%

INDIA
Unmanaged business travel

78%

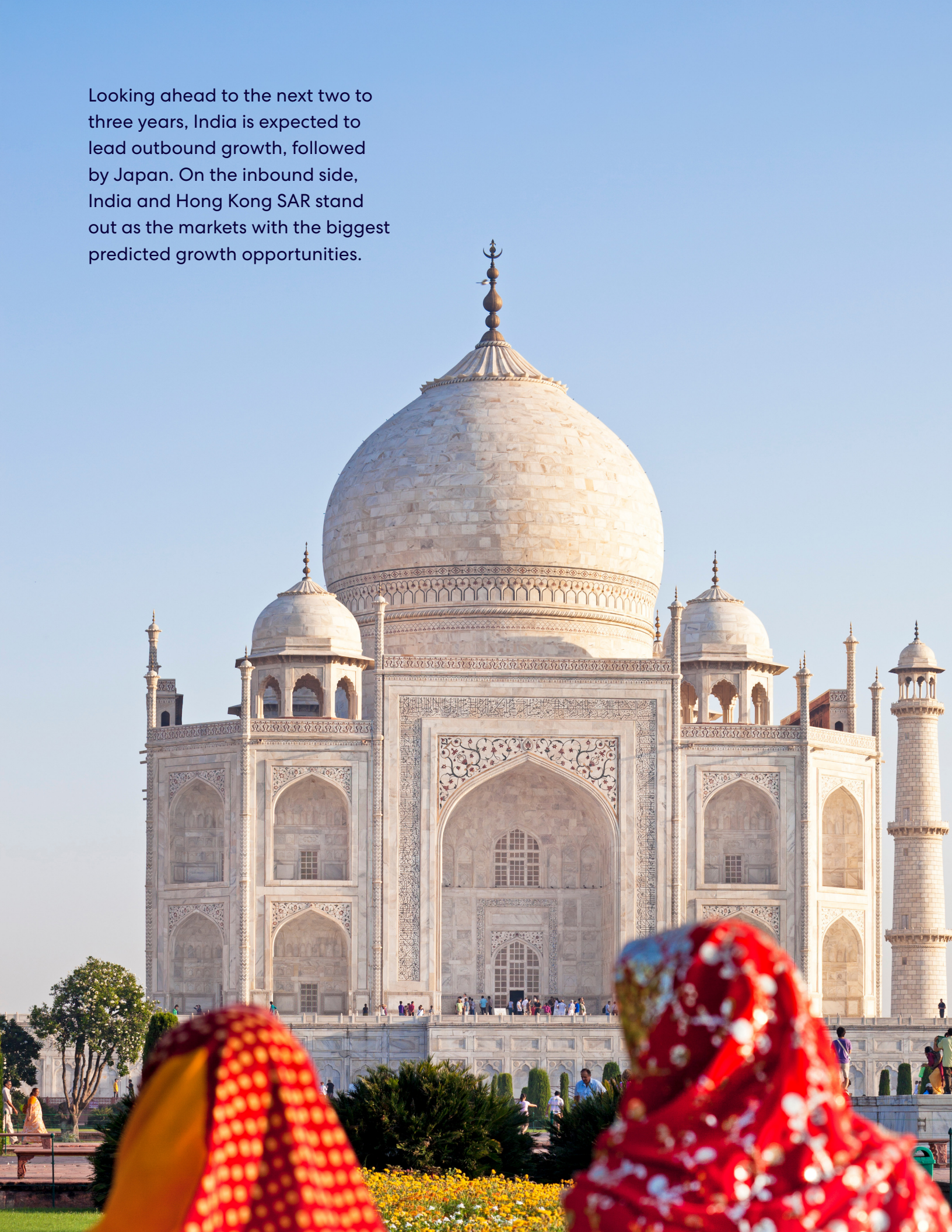
JAPAN
Managed corporate travel

64%

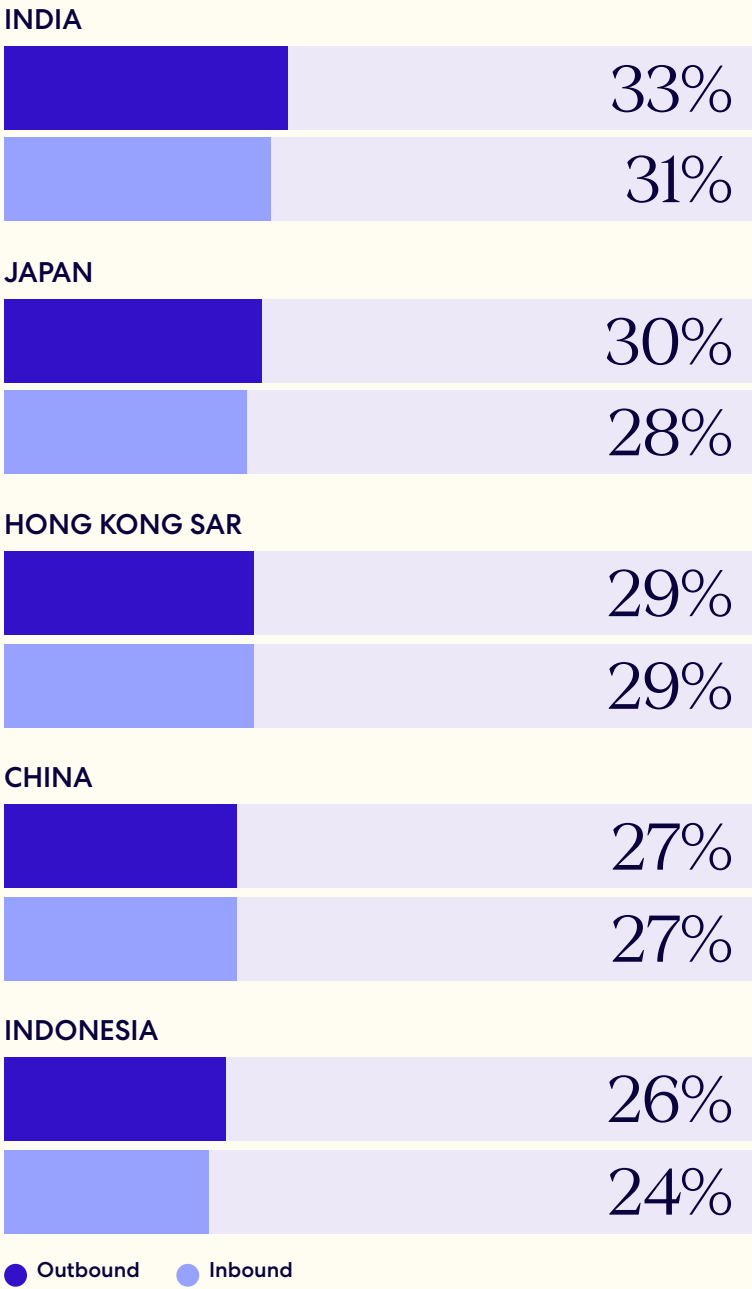
THAILAND
Budget leisure travel

60%

Looking ahead to the next two to three years, India is expected to lead outbound growth, followed by Japan. On the inbound side, India and Hong Kong SAR stand out as the markets with the biggest predicted growth opportunities.



Countries with the biggest growth opportunities in the next 2-3 years



The findings also make clear that growth in APAC is unlikely to follow a single path. It is taking shape differently across markets, traveller types and trip purposes, reinforcing the importance of reading local demand patterns early, staying flexible as conditions evolve and responding with experiences that reflect what travellers want in each market.

Thinking about where your travellers start their trips, which APAC origin markets, if any, do you see as your biggest growth opportunities over the next 2-3 years? (Select up to 3.)
Thinking about where your travellers travel to, which APAC destination markets, if any, do you see as your biggest growth opportunities over the next 2-3 years? (Select up to 3.)

APAC travellers are increasing their expectations

Across APAC, traveller expectations are rapidly increasing, from how people search and book to the payment options they expect at checkout. What may once have felt like differentiators are increasingly becoming baseline expectations.

Payment stands out as a clear area of increased expectations. Over the past two years, the importance of local and diverse payment options has increased more than any other factor for APAC travellers. Buy now, pay later, global credit and debit cards, and loyalty points or miles now rank among the most in-demand payment methods across key markets.





But relevance in APAC goes far beyond payments. Several factors have risen in importance over the past two years, with local and diverse payment options leading the way, followed by the ability to book through AI tools, sustainable travel options and flexible change and cancellation options.

Over the last two years, several factors have risen in importance to travellers.

- | | |
|---|--|
| 1 | Local and diverse payment options |
| 2 | Ability to book through AI tools |
| 3 | Sustainable travel options |
| 4 | Flexible change and cancellation options |
| 5 | Booking via non-traditional platforms |
| 6 | In-language and localised experiences |
| 7 | Ability to earn and redeem loyalty rewards |
| 8 | Bundled trips |

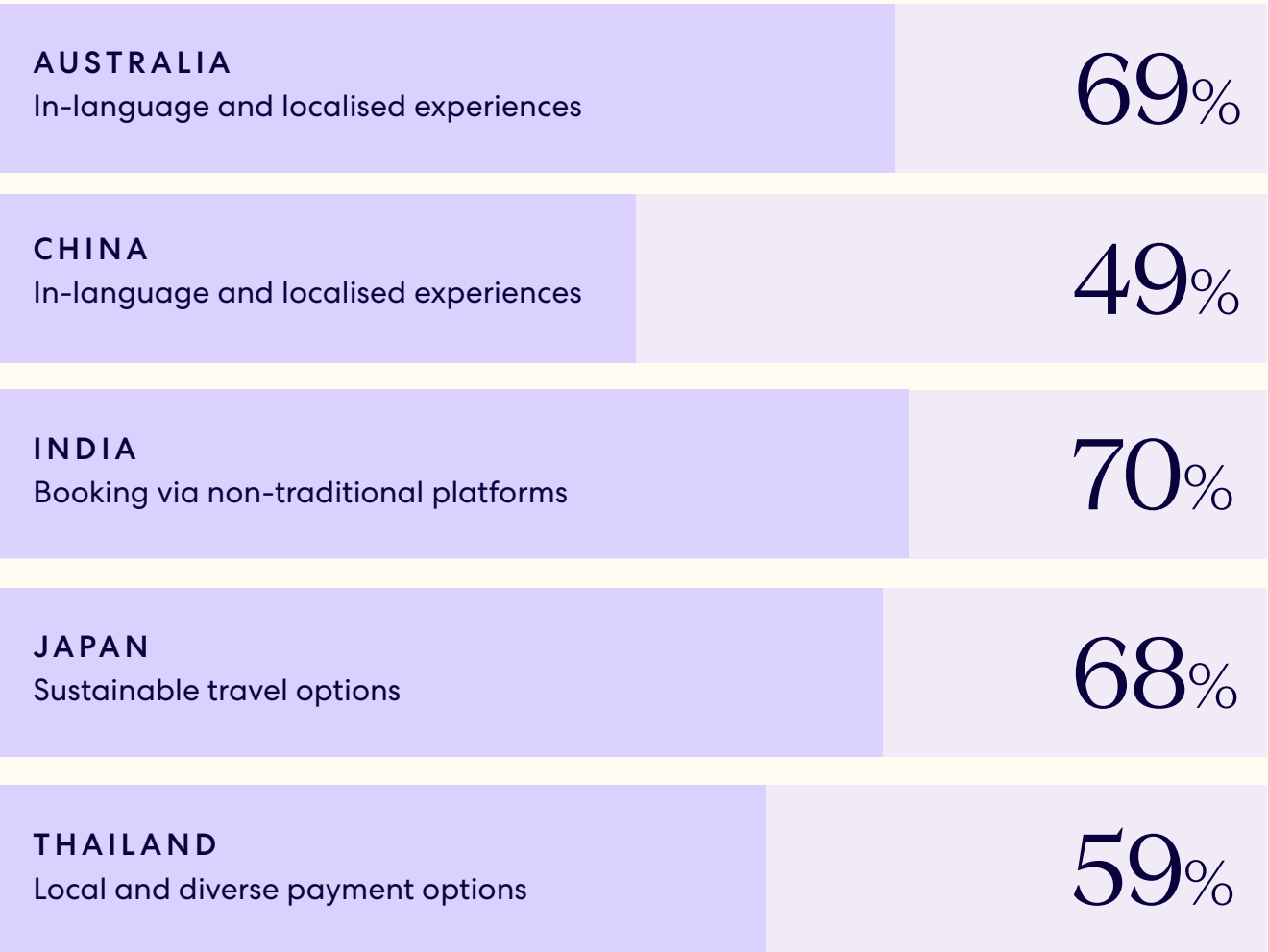
What travellers value in one market may look very different in another.

In Australia, professionals point to stronger demand for localised and in-language experiences. In India, demand is growing for booking through non-traditional platforms. In Japan, sustainable travel options are becoming a greater priority, while in Thailand local and diverse payment options continue to climb.



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What has risen most in importance by country



As traveller expectations continue to evolve, the research points to the importance of understanding what matters in each market. What builds trust and drives conversion in one country may not have the same impact in another.



70%

of respondents identified the following among the most important payment options:

- 1 Buy now/pay later plans
- 2 Credit and debit cards from global schemes
- 3 Loyalty points or miles as full or partial patial payments

Business challenges are impacting travellers

Across APAC, businesses face growing pressure to meet local traveller expectations, stay price competitive, support local payments and currencies, adapt to rapid technology and AI change, and distribute inventory effectively.

Travellers may never see the systems behind travel, but they notice when experiences feel slow, fragmented or difficult. That is why business challenges increasingly show up in the traveller journey, especially in discovery, content relevance, booking, payment and post-booking support.



Lack of localised content stands out as one of the biggest challenges businesses face in trying to engage APAC travellers.

Additional challenges include technology limitations and the ability to offer competitive prices and support local payment needs.



The biggest challenges in the APAC travel market today

Lack of localised content for APAC travellers



Limited ability to offer competitive prices or promotions



Technology limitations that slow you down



Limited ability to support local payment methods or currencies



Access to the right mix of inventory



Difficulty differentiating your offering from competitors



Access to enough relevant inventory in key APAC destinations



Limited demand in specific routes or markets you want to grow





Different business types are feeling these pressures in different ways, but the throughline is clear: operational and structural gaps are making it harder to deliver the kind of experience travellers increasingly expect.

Some of the most visible pain points differ by business type. OTAs cite difficulty supporting local payment methods and currencies, TMCs struggle to differentiate their offerings, and loyalty and financial services businesses point to a lack of localised content. The common thread is adaptability: as traveller expectations keep evolving, businesses need systems that make it easier to deliver experiences that feel local, relevant and easy to navigate.

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Top challenges for different business types

Financial services:
lack of localised content

35%

Loyalty programmes:
lack of localised content

38%

OTAs: limited ability to support
local payment methods or currencies

40%

TMCs: difficulty differentiating
my offering from competitors

31%

For travellers, one of the top pain points is finding content that feels local and relevant, which reinforces the idea that the business challenges, like content creation, behind the scenes directly affect the traveller experience.

Other pain points include discoverability in search and AI-driven environments, friction around changes and cancellations, disruption management and limited payment options.

The biggest pain points for travellers in the APAC traveller journey

Finding options that feel local/relevant



Discoverability of my travel platform in search and AI engines



Handling disruptions



Finding the right option



Managing changes and cancellations



Getting support during the trip



Earning and using loyalty rewards



Limited payment options



In APAC, business challenges are no longer just back-end issues.

They increasingly shape the traveller experience, from how people discover options to how easily they can book, pay and navigate changes.



AI priorities and technology gaps

AI has moved from experimentation to everyday use in APAC travel. Nearly every organisation is already using AI or plans to, often across multiple parts of the business. In fact, 79% of travel professionals say they already use AI in at least one area of their business, and 97% plan to use it going forward.

The conversation is no longer about whether AI will play a role. It is about where it can add the most value across the traveller journey and how businesses can support it at scale.





79%

of travel professionals already use AI in at least one area of their business.

That broader trend is also showing up in the technology road map. Across APAC, travel professionals say their priorities for the next 12–24 months centre on richer content and more competitive rates, AI-powered pricing and improving internal system integrations.

Customer service and chatbots are currently the biggest area where travel professionals are already using or planning to use AI. Looking ahead, attention is expanding into other parts of the business, with marketing and merchandising, fraud detection and search recommendations rising as leading near-term priorities.

Top tech priorities for the next 12–24 months

Richer content and
more competitive rates

34%

AI-powered pricing
and merchandising

33%

Improving internal
systems integration

32%

Better connectivity/
APIs with partners

31%

Personalisation and
recommendations

31%

Fraud prevention and
risk management tools

31%

Automation of servicing
(changes, cancellations, refunds)

31%

Analytics and reporting
capabilities

29%



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Top tech priorities for business types

Travel businesses are looking for technology that can help them make better decisions, improve relevance, and connect systems more effectively.

For OTAs and TMCs, the biggest focus is AI-powered pricing and merchandising. Loyalty programmes are prioritising personalisation and recommendations. Financial services businesses are concentrating on richer content and more competitive rates.

FINANCIAL SERVICES

37%

richer content and more competitive rates

LOYALTY PROGRAMMES

36%

personalisation and recommendations

OTAs

37%

AI-powered pricing and merchandising

TMCs

35%

AI-powered pricing and merchandising

But adoption is not without its challenges. Around one-third of surveyed professionals point to integration complexity and difficulty identifying trusted partners as major barriers. The challenge is no longer whether to adopt AI, but how to make it useful, reliable and connected to the traveller experience at scale.

Biggest barriers to adopting and scaling new technology

1	Difficulty finding trusted external partners or vendors
2	Integration complexity with existing systems
3	Uncertainty about return on investment (ROI)
4	Conflicting internal priorities or limited stakeholder buy-in
5	Lack of internal technical expertise or resources
6	Concerns about data privacy, security or regulation
7	Budget or investment constraints

What, if anything, are the biggest barriers your organisation faces when adopting or scaling new technology for your travel business? (Select up to 3.)



Trust still matters in AI-travel landscape

In recent research, we looked further into the topic of AI and traveller trust. **The findings show that AI supports discovery, but trust drives bookings.**

Travellers are open to AI for inspiration and planning, but the research shows that they still want control when it comes to booking. Their hesitations are tied to concerns around **loss of control (57%), data privacy (57%) and misuse of personal data (56%).**

- 53% are comfortable letting AI suggest options.
- 66% would not trust AI to buy or book on their behalf.
- 68% still prefer to book with a trusted travel brand over AI platforms.

Learn more

Business resilience starts with trusted partnerships

Across the region, the challenge is no longer simply scaling demand. It is making the travel journey feel easy and connected, even as the operating environment becomes more complex. Travellers may never see the systems that power their journey, but they feel the impact when experiences are slow, fragmented or hard to navigate.

Behind the scenes, businesses are balancing a myriad of challenges all at once, from rising demand and servicing complexity to partner integrations, cybersecurity risks and ongoing technology change. Looking ahead, APAC travel businesses are focused not just on growth, but on resilience.





The biggest concerns for travel businesses in the next 2-3 years

The travel industry is facing growing pressure from legacy systems, operational complexity and the pace of technological change. Across the travel landscape, the number one challenge is the capacity to handle spikes in demand or servicing surges, while other concerns like risks of cybersecurity and fraud and the limitations of current technology vary by business type.

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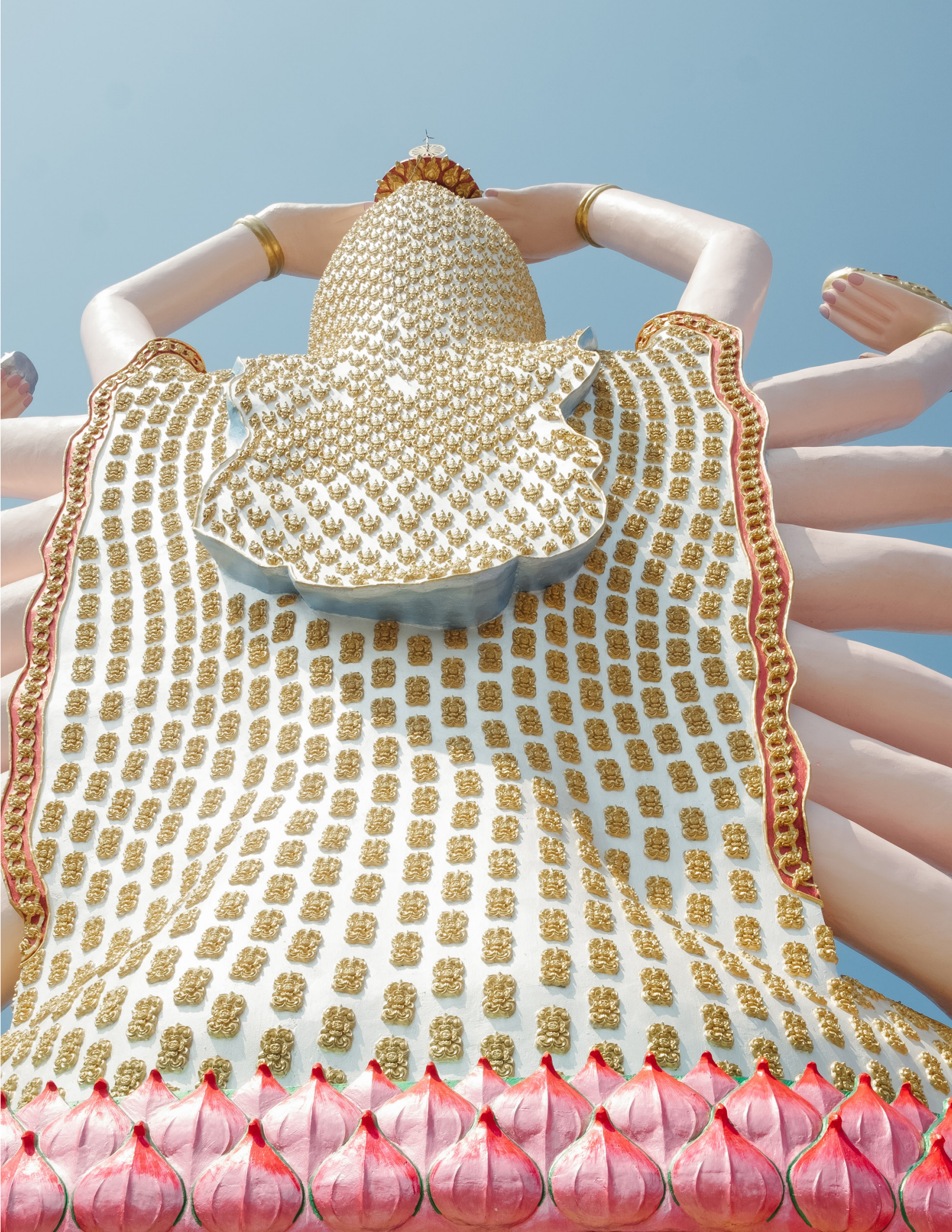
Top concerns for different types of business

	Financial services	Loyalty programme	Online travel agencies	Travel management companies
1	Capacity to handle spikes in demand or servicing surges	Capital expenditure required for technology or infrastructure changes	Capacity to handle spikes in demand or servicing surges	Capacity to handle spikes in demand or servicing surges
2	Difficulty integrating with external partners and platforms	Keeping up with speed of technological change in the AI era	Difficulty integrating with external partners and platforms	Over-reliance on a small number of channels or partners
3	Keeping up with speed of technological change in the AI era	Cybersecurity and fraud risks	Limitations of current technology and systems	Cybersecurity and fraud risks

While the pressure shows differently by business type, the broader pattern is consistent. APAC travel businesses are looking for support that helps them scale, reduce operational strain and respond more effectively to disruption.

The broader implication is that the next phase of competitive advantage in APAC may depend on resilience as much as innovation. As demand grows and expectations rise, businesses will need stronger systems, faster integrations and partners that help them move more quickly rather than slow them down.

What, if anything, are the biggest concerns for your travel business over the next 2-3 years? (Select up to 3.)



Takeaways

Building for the future of travel in APAC

Traveller expectations are evolving quickly across the region, creating new opportunities for partners who can deliver more local, flexible and intuitive travel experiences.

Expedia Group is here to help, with B2B solutions like Rapid API, a modular solution for fully custom search, shop, book and post-book experiences, and White Label Travel Platform, which enables branded end-to-end travel booking. The businesses best positioned for growth will be the ones that stay closely aligned with how travellers search, book, pay and move through the world.



Based on the findings in this report, here are five actionable ways to capture demand in APAC's next era of travel.

1

Capture fragmented demand in APAC

No single traveller segment or booking behaviour is driving growth across APAC. Demand is fragmented across markets, making flexibility a competitive advantage. Expedia Group can help through [Rapid API](#), which offers access to high-quality, global lodging and car travel inventory.

The robust, flexible, stable API structure offers custom integrations and supports tailored shopping, booking, payment and post-booking experiences. Rapid also powers full-trip planning with Rapid Flights, [Car](#), Activities and Trip APIs all in one place. It can also help through [White Label Travel Platform](#), which supports branded end-to-end booking experiences across a broad range of global travel inventory, including hotels, flights, cars, activities, airport transport and holiday packages.

2

Meet rising payment and value expectations

Travellers increasingly expect booking experiences that feel flexible, relevant and easy to navigate. Expedia Group helps partners localise the traveller experience through Rapid API and White Label Travel Platform with payment options, loyalty integrations and value-added offers. With Rapid API, partners can offer lodging shopping and booking in 34 languages and 38 currencies.* Rapid accepts 12 credit card brands, helping partners support familiar payment options.

For White Label Travel Platform, loyalty integration is a key differentiator, enabling partners such as airlines, financial institutions and eCommerce brands to connect travel bookings to their loyalty programmes. Travellers can redeem points as payment, helping partners deliver value through Expedia Group's global travel supply. Across both solutions, partners can tailor shopping and booking experiences with localised content, supported languages and currencies and point-of-sale settings aligned with traveller expectations.

3

Close localisation gaps that block conversion

Across APAC, relevance goes far beyond translation. Content, language, pricing, imagery and booking flows all need to feel familiar and locally appropriate if brands want to improve their discoverability and trust. Expedia Group can help partners localise more effectively through White Label Travel Platform, which enables a partner-branded experience across multiple points of sale, tailored to the appropriate languages and currencies, while maintaining a consistent traveller interface across devices.

Rapid API helps partners tailor the booking experience to their market needs with supported language codes for localised content, a wide range of currency options for shopping and booking and point-of-sale settings that align transactions with traveller expectations. It also helps partners build trust earlier in the journey with rich lodging content, including more than 29M property images and 21M room images, plus over 57M traveller reviews and 82M traveller ratings worldwide.*

4

Turn AI ambition into real-world impact

AI adoption is accelerating, but the biggest opportunity is making it practical for travellers. Businesses stand to gain the most when AI is connected to real traveller needs and embedded in experiences that can scale.

Expedia Group helps partners build more intelligent travel experiences through the flexible foundation of Rapid API to build AI-native search, shopping and servicing experiences, including emerging natural-language search and agent use cases. With White Label Travel Platform, partners can also bring AI more directly into the traveller experience with capabilities such as Smart Trip AI™, alongside broader AI-powered customisation for partner experiences.

5

Build resilience for spikes and disruptions

As travel across APAC continues to evolve, partners need technology that can help them move faster, serve travellers more intuitively, and stay ready for what's next. Expedia Group's B2B solutions help partners build resilience with flexible technology and end-to-end travel capabilities.

White Label Travel Platform can help businesses launch a travel booking, servicing and loyalty experience without the heavy lifting. Rapid API can power an end-to-end travel solution with the flexibility to fully customise it to their business needs. In 2025, it received 7.7 trillion calls, averaging more than 21 billion calls per day.* Combined with Expedia Group's global B2B network of 75K businesses and 200K travel agents worldwide, that scale gives partners added confidence in our ability to support growth and change.*



PARTNER WITH US

Ready to meet rising traveller demand and grow your business?

Explore [Expedia Group travel technology solutions](#) and learn how we can partner to help unlock new revenue opportunities through travel.

Get started

