



# Mapping the future of APAC travel

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



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A man with a beard, wearing a light-colored t-shirt, a tan hat, and a brown backpack, is sitting on a wooden bench. He is looking out over a vast, blue ocean with white waves crashing onto a sandy beach. The sky is a clear, pale blue with a few wispy clouds. The foreground shows some green grass and a concrete base for the bench.

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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, localized content needs, diverse payment and loyalty preferences, and the rise of new booking behaviors all make growth harder to capture. Expectations can differ significantly from travelers 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 recognizing the scale and the opportunity. It requires the ability to respond quickly to changing traveler 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 traveler 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 traveler behavior, 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), transportation, loyalty programs, and financial services

### MARKETS

Australia  
China  
India  
Japan  
Thailand

### FIELDED

March 26–April 1, 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

Travelers want more payment methods

Local and diverse payment options are increasingly important to APAC travelers, 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 travelers 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 prioritizing 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 traveler 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.

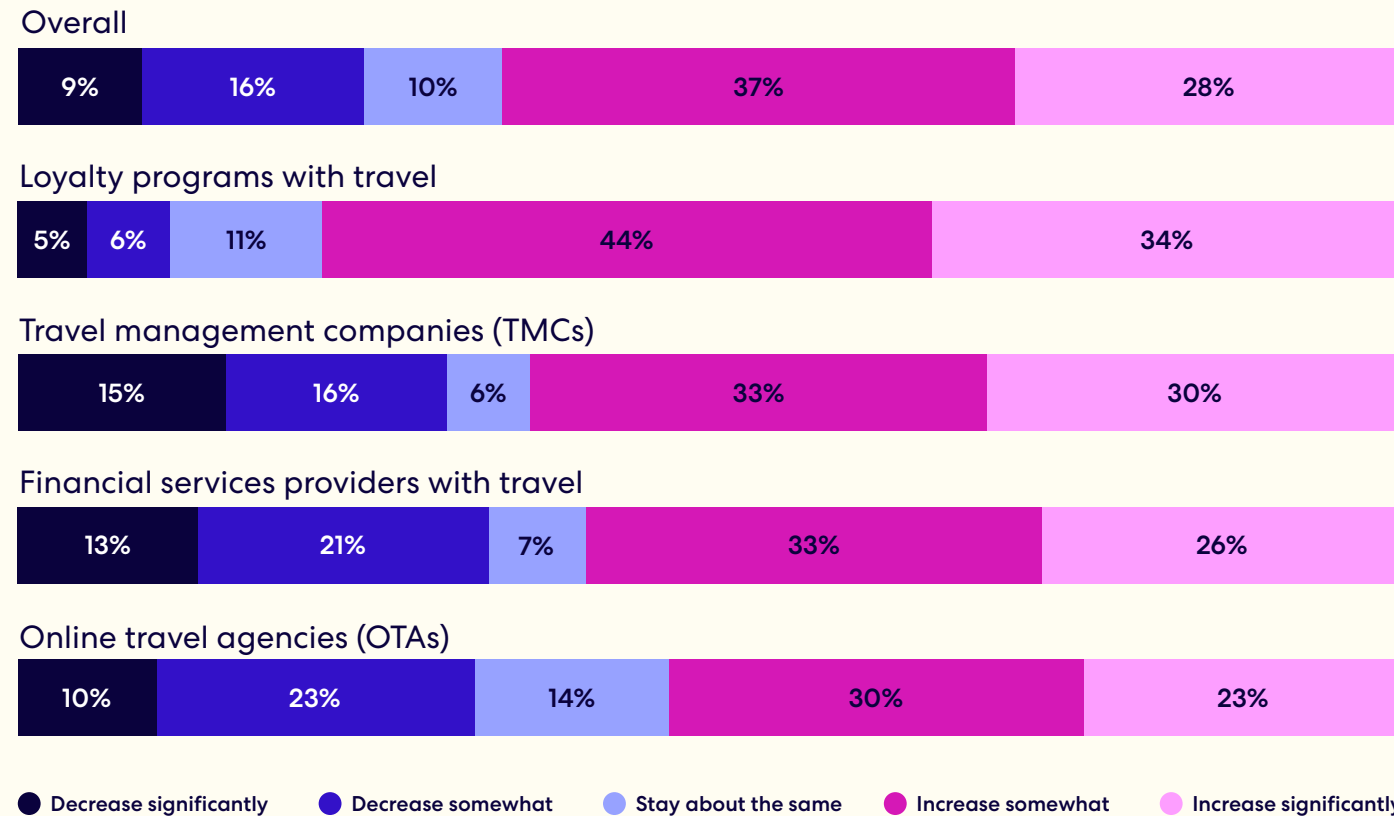
Confidence in APAC's outlook extends across the industry, rather than being concentrated in any one segment. While expectations for growth are strong across business types, loyalty programs stand out in particular, with 78% of loyalty program professionals expecting demand to increase.



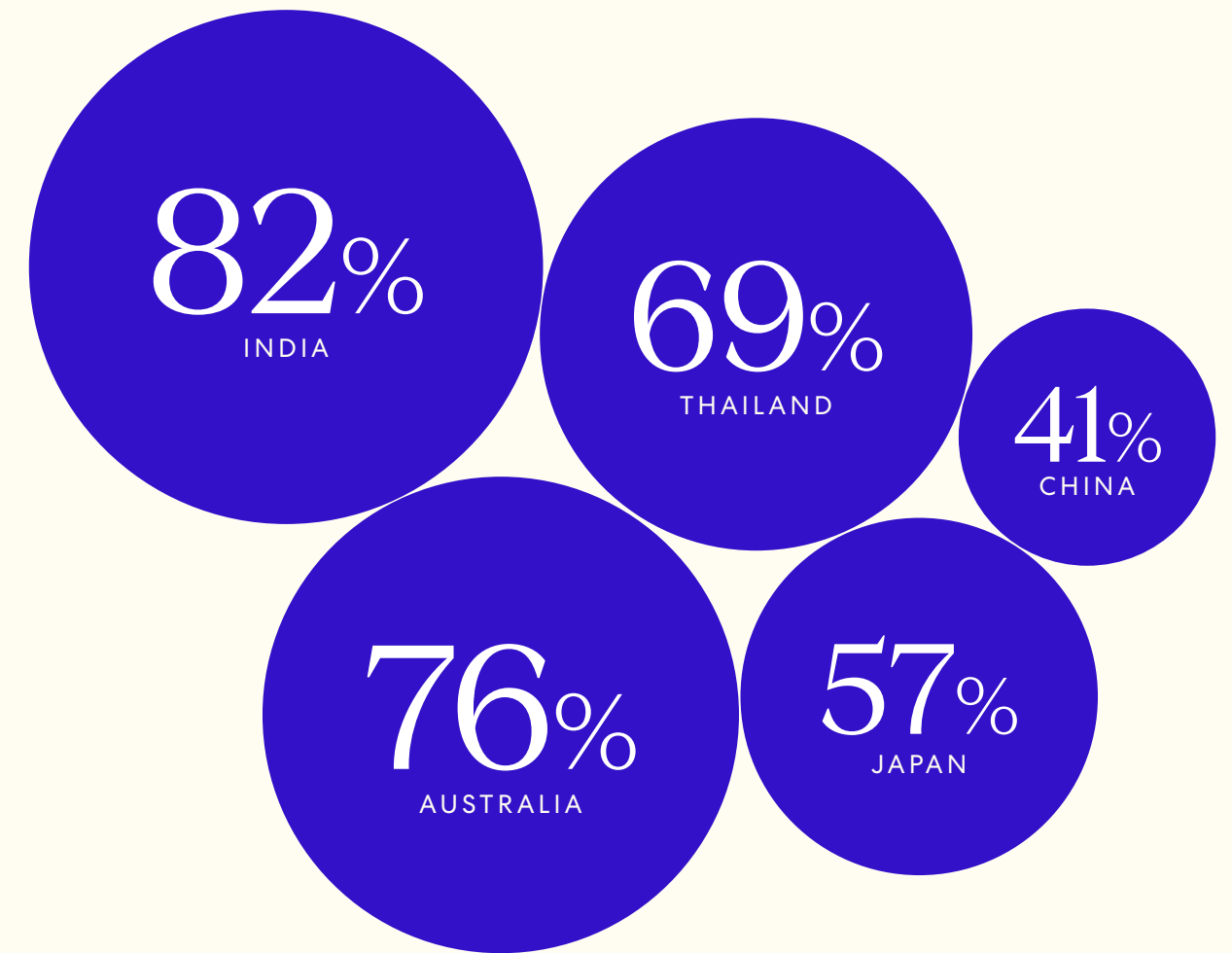
# 65%

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 travelers 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%

## SEGMENT INSIGHT

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

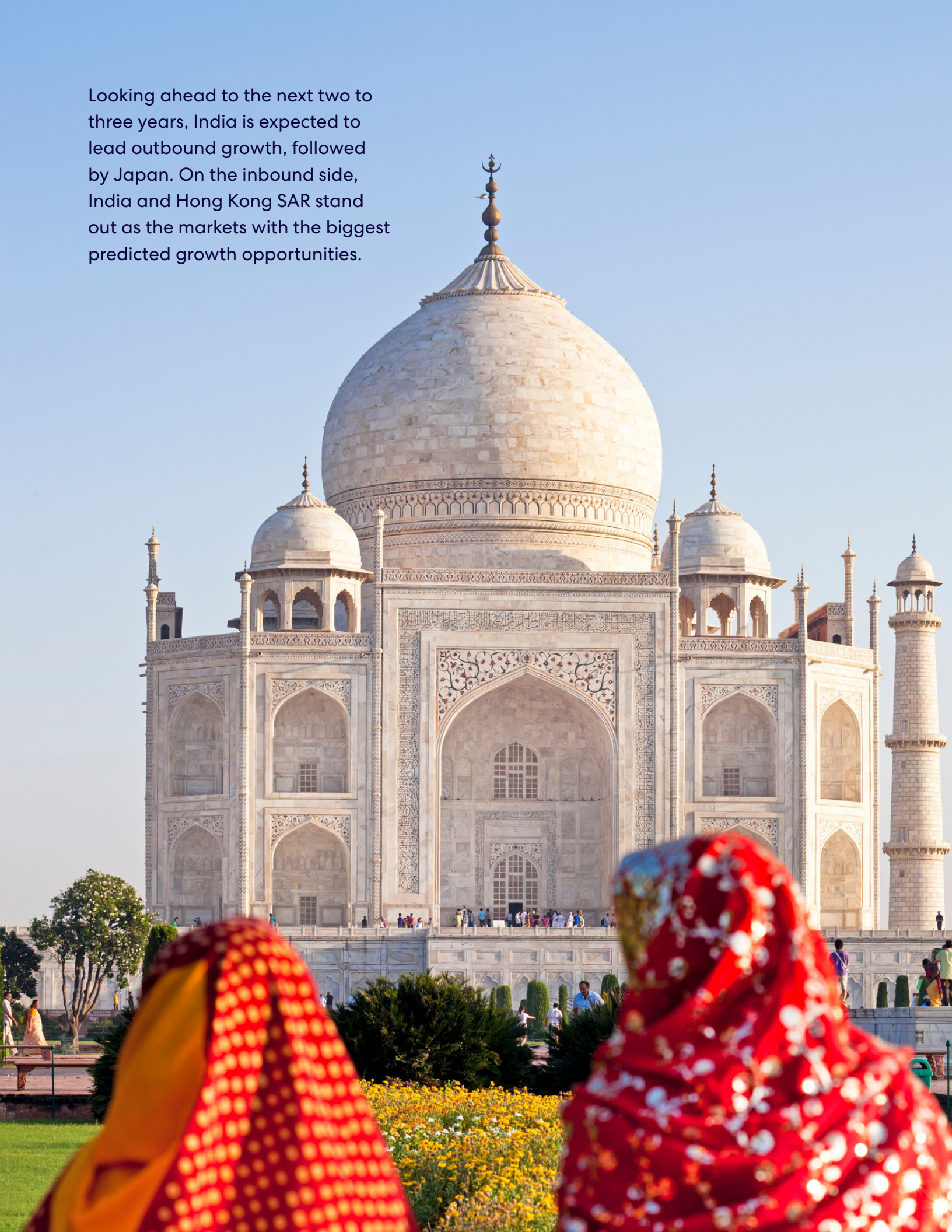
64%

### THAILAND

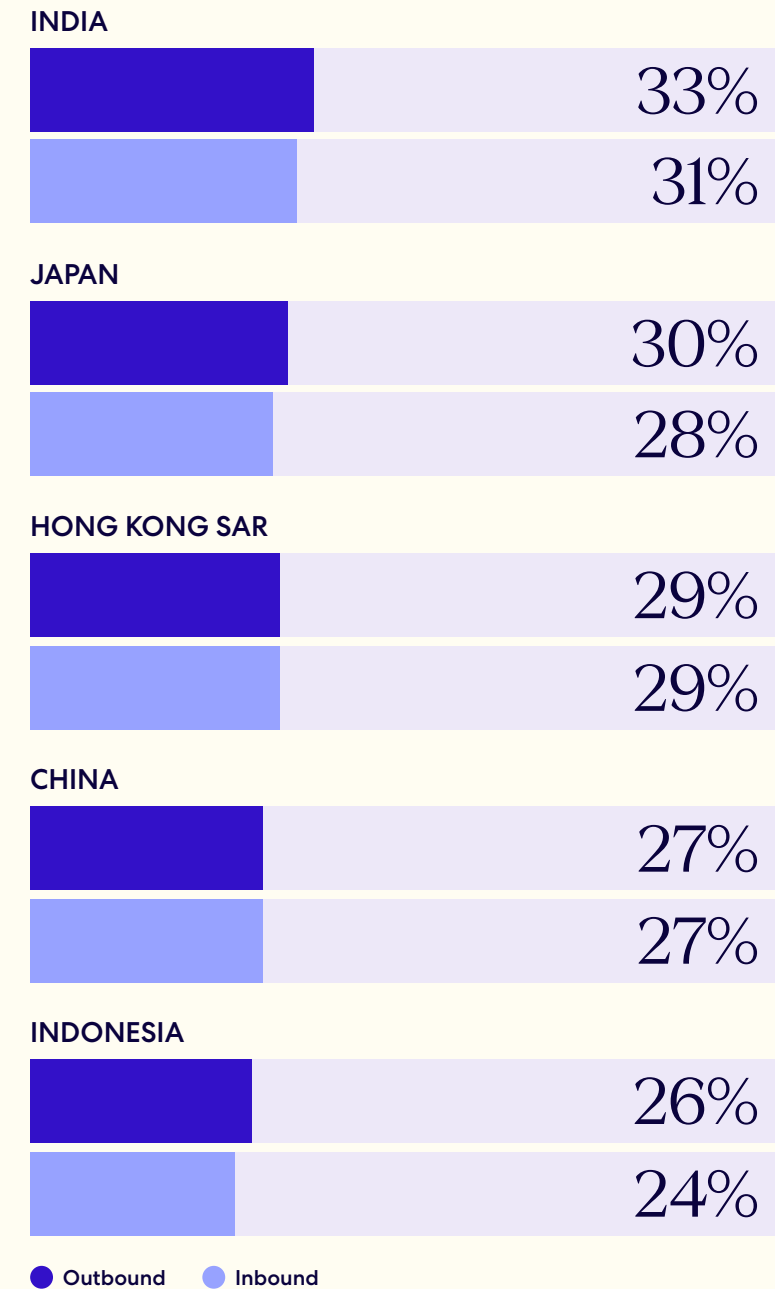
Budget leisure travel

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, traveler 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 travelers want in each market.

Thinking about where your travelers 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 travelers 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 travelers are increasing their expectations

Across APAC, traveler 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 travelers. 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 travelers.

- 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 localized experiences
- 7 Ability to earn and redeem loyalty rewards
- 8 Bundled trips

# What travelers value in one market may look very different in another.

In Australia, professionals point to stronger demand for localized 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.



**SEGMENT INSIGHT**

What has risen most in importance by country



As traveler 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 travelers

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

Travelers 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 traveler journey, especially in discovery, content relevance, booking, payment, and post-booking support.



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

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 localized content for APAC travelers

33%

Limited ability to offer competitive prices or promotions

31%

Technology limitations that slow you down

31%

Limited ability to support local payment methods or currencies

31%

Access to the right mix of inventory

30%

Difficulty differentiating your offering from competitors

30%

Access to enough relevant inventory in key APAC destinations

29%

Limited demand in specific routes or markets you want to grow

28%

Where, if anywhere, do you see the biggest gaps or challenges in the APAC travel market today for your business? (Select up to 3.)



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 travelers 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 localized content. The common thread is adaptability: As traveler expectations keep evolving, businesses need systems that make it easier to deliver experiences that feel local, relevant, and easy to navigate.

#### SEGMENT INSIGHT

### Top challenges for different business types

Financial services:  
Lack of localized content

35%

Loyalty programs:  
Lack of localized content

38%

OTAs: Limited ability to support  
local payment methods or currencies

40%

TMCs: Difficulty differentiating  
my offering from competitors

31%

For travelers, 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 traveler 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 travelers in the APAC traveler journey

Finding options that feel local/relevant

34%

Discoverability of my travel platform in search and AI engines

34%

Handling disruptions

32%

Finding the right option

32%

Managing changes and cancellations

30%

Getting support during the trip

28%

Earning and using loyalty rewards

27%

Limited payment options

26%

Where, if anywhere, do you see the biggest pain points today in the APAC traveler journey for your customers? (Select up to 3.)

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

They increasingly shape the traveler 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 organization 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 traveler 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 roadmap. Across APAC, travel professionals say their priorities for the next 12-24 months center 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%
Personalization and recommendations	31%
Fraud prevention and risk management tools	31%
Automation of servicing (changes, cancellations, refunds)	31%
Analytics and reporting capabilities	29%



#### SEGMENT INSIGHT

### 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 programs are prioritizing personalization and recommendations. Financial services businesses are concentrating on richer content and more competitive rates.

#### FINANCIAL SERVICES

# 37%

richer content and more competitive rates

#### LOYALTY PROGRAMS

# 36%

personalization 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 traveler 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 organization 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 traveler trust. **The findings show that AI supports discovery, but trust drives bookings.**

Travelers 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. Travelers 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 limitations of current technology vary by business type.

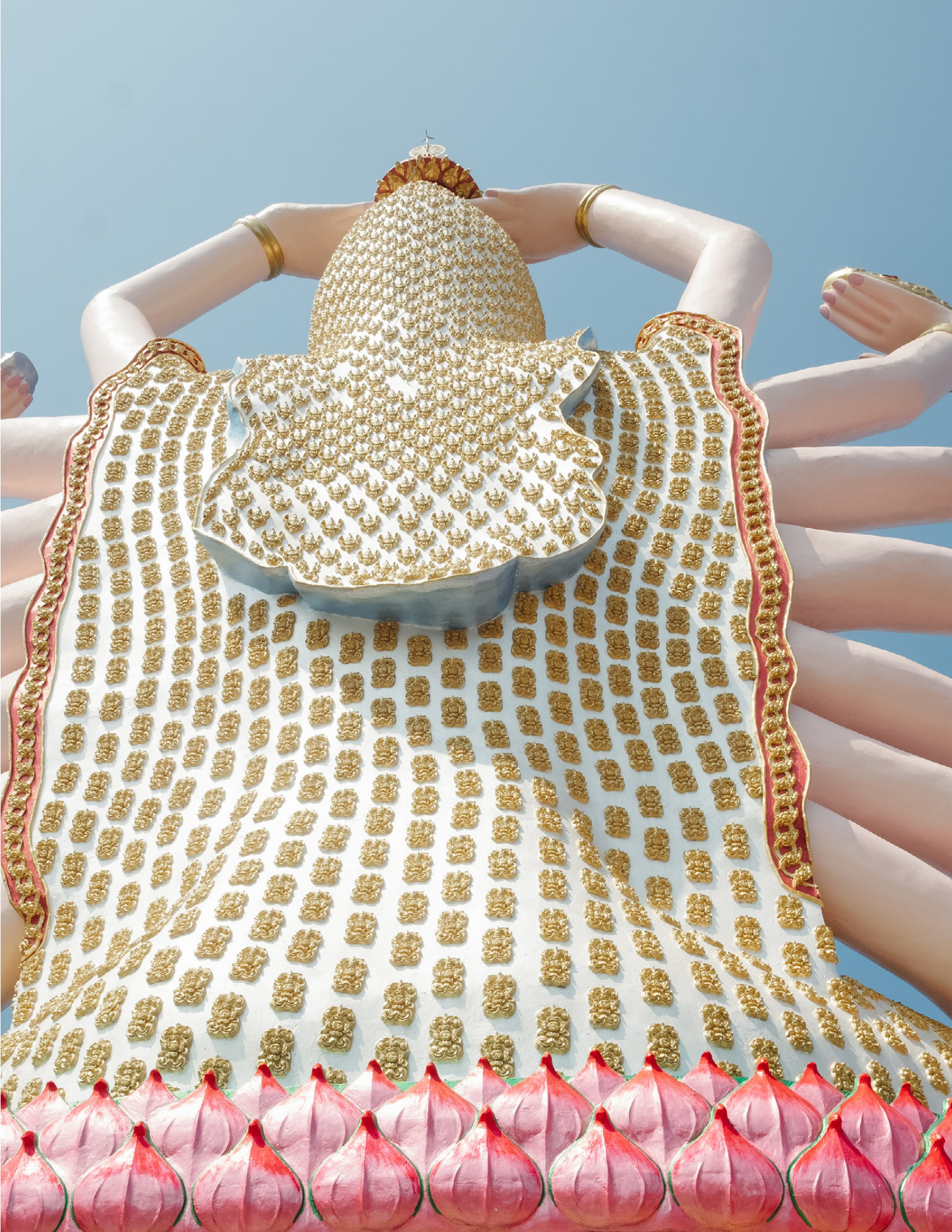
### SEGMENT INSIGHT

## Top concerns for different types of business

Financial services	Loyalty program	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.



Takeaways

# Building for the future of travel in APAC

Traveler 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 travelers 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 traveler segment or booking behavior 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 transportation, and vacation packages.

## 2

### Meet rising payment and value expectations

Travelers increasingly expect booking experiences that feel flexible, relevant, and easy to navigate. Expedia Group helps partners localize the traveler 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 programs. Travelers 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 localized content, supported languages and currencies, and point-of-sale settings aligned with traveler expectations.

## 3

### Close localization 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 localize 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 traveler interface across devices.

Rapid API helps partners tailor the booking experience to their market needs with supported language codes for localized content, a wide range of currency options for shopping and booking, and point-of-sale settings that align transactions with traveler 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 traveler reviews and 82M traveler ratings worldwide.\*

# 4

## Turn AI ambition into real-world impact

AI adoption is accelerating, but the biggest opportunity is making it practical for travelers. Businesses stand to gain the most when AI is connected to real traveler 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 traveler experience with capabilities such as Smart Trip AI™, alongside broader AI-powered customization 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 travelers 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 customize 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 traveler 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

