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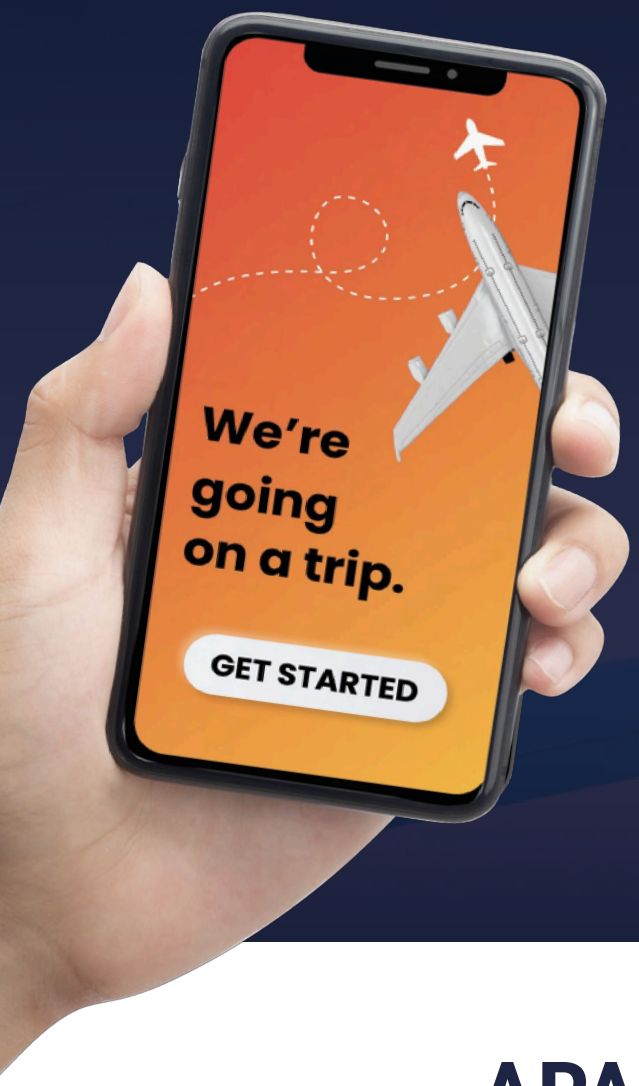


BEYOND THE BOOKING:

Where APAC Travel Brands are Investing for Growth

100 travel marketers across Southeast Asia.
1,200 travellers across Singapore, Australia & China.

Here's what they told us.

APAC Travel at a Glance

316M
trips booked to Asia Pacific last year

80%+
of industry leaders cite customer growth as a top priority

65%
of brands are now focused on retention — not just acquisition

Marketers are betting on ads.
Travellers are betting on trust.

Top 3 Channels Influencing Travellers Decisions (Marketers' POV)

Comparison Sites 28%

Digital Ads 24%

Influencers 18%

Source: SEA Marketer Survey (n=100),
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth (2025)

What Travellers Actually Use

SINGAPORE

Comparison sites 74%

OTAs 65%

Cashback & loyalty 51%

AUSTRALIA

Comparison sites 74%

OTAs 68%

Word of mouth 51%

CHINA

OTAs 77%

Cashback & loyalty 59%

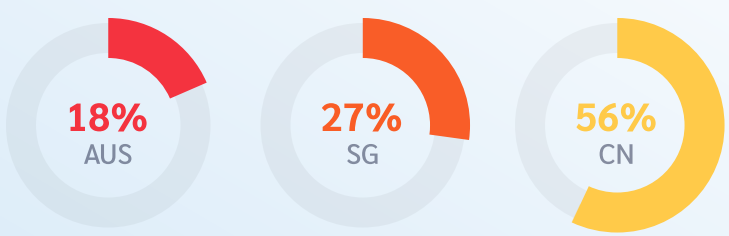
Comparison sites 58%

Source: Singapore (n=400), Australia (n=400) and China (n=400) Consumer Survey,
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth (2025)

Word of mouth is among the most trusted sources for travellers, yet most brands dramatically underinvest in it.

Where Consumers Place Their Trust

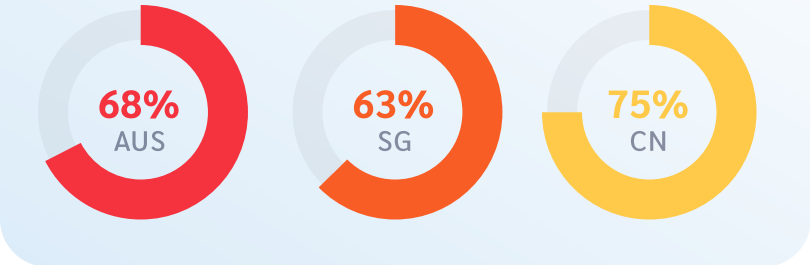
Digital Advertising

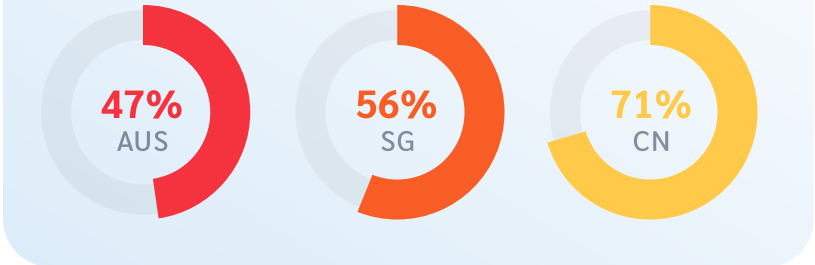


OTAs

Word of Mouth

Affiliate Marketing





Source: *Singapore (n=400), Australia (n=400) and China (n=400) Consumer Survey,*
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth (2025)

Affiliate marketing, OTAs and word of mouth are high trust channels for customer acqusition and direct bookings.

Top 3 Factors Influencing Bookings
(Marketers' POV)

1. **Brand reputation & trust**
2. **Price & promotions**
3. **Online reviews & ratings**

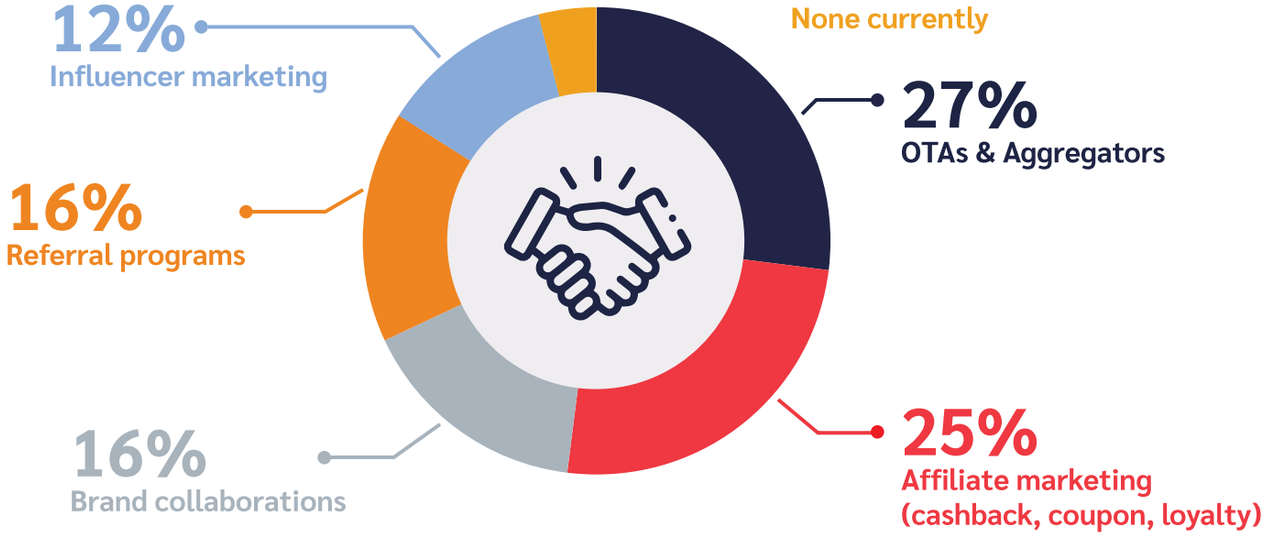
Source: SEA Marketer Survey (n=100),
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth

The future of travel marketing isn't owned. It's partnered.

92% of younger travellers say their last trip was inspired by social media.
Strategic partnerships now sit at every stage of the booking journey.

How brands are currently investing in partnerships

4%



Source: SEA Marketer Survey (n=100),
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth

Partnerships Across the Funnel

Influencers & affiliates build awareness and credibility

Influencers spark interest; affiliates drive consideration

Cashback & loyalty platforms convert engagement into bookings

The catch:

*OTA commission fees can reach **30%,** pushing brands toward performance-based models where you only pay when a booking happens.*

Source: SEA Marketer Survey (n=100),
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth

Top 3 Partnership Challenges

1	Measuring ROI accurately	25%
2	Finding the right partners	21%
3	Scaling efficiently	20%

Source: SEA Marketer Survey (n=100),
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth

How Are Travel Marketers Spending?

How Is Your Marketing Budget Primarily Allocated Across Channels?*

1 = Largest Budget Share 8 = Smallest Budget Share

Largest Budget Share

Digital advertising (e.g., social media ads, search ads, display ads, etc.)	1.87
OTAs (e.g., Klook, Booking.com, etc.)	3.41
Influencer Marketing	4.26
Traditional Media (e.g., TV, radio, print, etc.)	4.63
Public Relations (PR)	4.85
Affiliate Marketing (e.g., cashback or comparison sites, etc.	4.98
Event's & Sponsorships	5.47
Brand Partnerships	6.53

Smallest Budget Share

Source: SEA Marketer Survey (n=100),
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth

While many travel brands continue to allocate budgets toward channels with the highest conversion rates, consumer behaviour tells a more complex story:

Travellers are using multiple sources for inspiration and decision-making - meaning brands must diversify investments across the full journey, not just the final booking touchpoint.

Top 3 Most Effective Booking Strategies

(Marketers' POV)

1. Personalised discounts & promotions
2. Improved mobile / website experience
3. Loyalty programs & memberships

Source: SEA Marketer Survey (n=100),
Beyond The Booking: Where APAC Travel Brands Are Investing for Growth

The next era belongs to brands that invest with purpose.

- Invest in trusted channels — OTAs, affiliates, influencers
- Prioritise long-term partnerships over short-term ad spend
- Diversify beyond paid media to build loyalty that lasts

Download the full report at impact.com

Learn how impact.com powers partnership growth for Virgin Australia, Malaysia Airlines, Skyscanner, Airbnb, and more.

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***Source:** Beyond The Booking: Where APAC Travel Brands Are Investing for Growth (2025)*

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