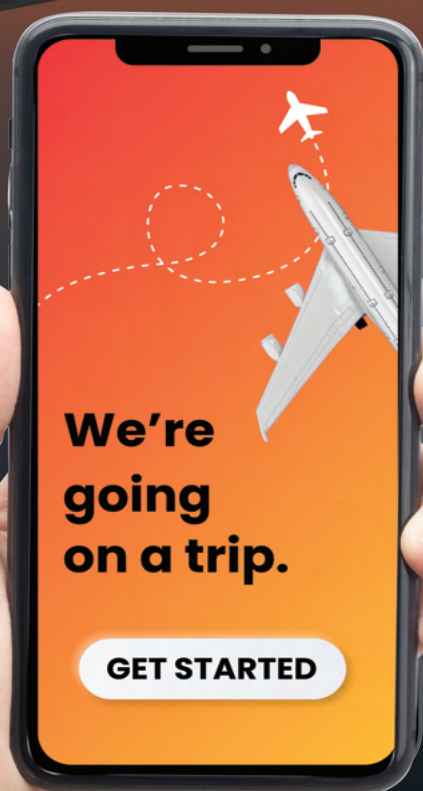


BEYOND THE BOOKING:

Where APAC Travel Brands Are Investing for Growth

An Industry Report



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Executive Summary

The global travel industry stands at a pivotal crossroads. After the surge of "revenge travel" in 2023, fuelled by pent-up demand post-pandemic, 2024 ushered in a new reality—"tiredness travel"—marked by fatigue, economic pressures, and geopolitical uncertainties. As a result, travel demand softened, creating a fragile ecosystem where uncertainty looms. In this shifting landscape, intensifying competition and rising acquisition costs have made customer growth more challenging than ever. Over 80% of industry leaders citing it as a top priority.

However, sustainable success demands more than just expansion:



65%

Of brands are now focusing on retention



64%*

Prioritise brand building to foster loyalty and long-term profitability

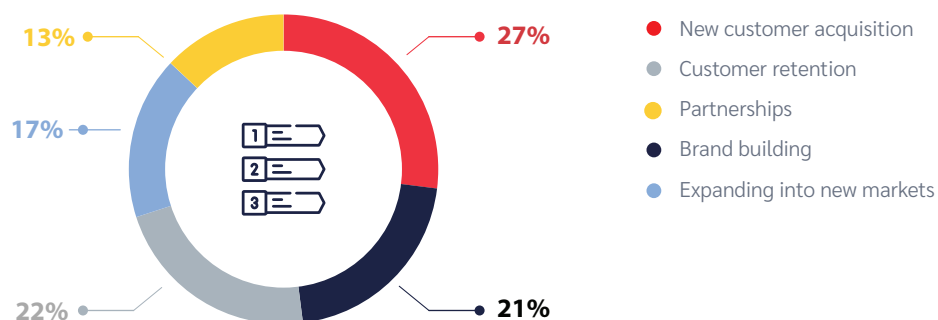
Looking ahead, air passengers expected to grow in the Asia Pacific region over the next 15 years, contributing to over half of the global rise in passenger traffic by 2043. The travel rebound in Asia is breaking new grounds, creating a fertile environment for the region to leapfrog in AI-driven innovation. Industry experts anticipate robust demand in 2025, driven by easing geopolitical tensions and renewed consumer confidence. Market shifts, emerging source regions like India and China, and digital and AI-powered strategies are infused into travel products and service operations. The challenge now lies in how travel businesses can adapt, innovate, and thrive in this rapidly evolving environment.

From leveraging technology, to enhancing customer experiences and rethinking marketing strategies that balance acquisition with loyalty, industry leaders must take a more data-driven, experience-led approach to stay competitive.



*This survey was conducted with 100 travel marketers across SEA
% of respondents who have selected this option as part of their 'Top 3' priority options

What Are Your Main Business Priorities Over The Next 12-18 Months?*



To provide a comprehensive understanding of the travel industry, this report draws on data from two separate surveys: one with 100 travel leaders across Southeast Asia, and another directly from 1,200 travellers based in Singapore, Australia, and China (400 per market). By combining these insights, we explore how businesses and consumers are navigating current challenges and opportunities. The traveller survey provides a crucial benchmark for marketers to understand consumer preferences, identify key booking drivers, and align their strategies with evolving traveller expectations.

This report serves as a benchmark for industry peers, providing a clear view of where they stand and how they can refine their strategies by aligning with both industry trends and consumer preferences.

Key Themes Emerging from the Survey



The Evolving Traveller – Understanding and Engaging Your Audience

Today's travellers are digitally savvy, leveraging comparison sites and reviews to guide their decisions. Trust, brand reputation, and competitive pricing now play pivotal roles in their booking choices. This chapter explores what influences consumer behaviour and how brands can adapt.



The Role of Partnerships in Driving Growth

Strategic collaborations with OTAs, affiliates, and influencers are helping brands expand their reach, but success depends on effective ROI measurement and optimised partnership management. This chapter breaks down how industry leaders are approaching these relationships for sustainable growth.



Where Travel Marketers Are Doubling Down

This chapter examines how brands are structuring their marketing channel mix. It reveals how brands are balancing performance-driven investments with trust-based marketing channels.

By connecting these insights, this report paints a comprehensive picture of how brands are navigating today's travel landscape, how consumer preferences and buying behaviours differ across markets and where travel marketers are placing their next big bets.

**This survey was conducted with 100 travel marketers across SEA*

Respondents must choose their top 3 options, % is derived from dividing gathered responses for each option out of 300

CHAPTER 1:

Understanding and Engaging the Evolving Traveller

Travellers are more connected, discerning, and influenced than ever before.

Digital platforms have reshaped research, booking, and experiences. Travellers favour seamless, intuitive interactions. They are increasingly empowered, take control of their journey and actively seek information from a variety of trusted sources.

While advertising remains key, consumers are less likely to follow a linear path from ad exposure to purchase. Instead, they turn to peers, social media influencers, and online reviews for inspiration and recommendations.

Travel companies must act swiftly, to deliver tailored experiences. Optimising engagement channels and leveraging data-driven insights to connect with customers at the right time, on the right platform, is crucial. The multifaceted customer journey now demands engagement at the very start, where every touchpoint plays a critical role in influencing decisions.

In Chapter 1, we dive deep into the forces shaping traveller behaviour across APAC - specifically Australia, Singapore, and China, and reveal the strategic blueprint brands need to stay competitive and capture tomorrow's traveller.

***Trust, Not Ads,
Drives
Today's
Traveller***



Travel Booking Behaviours: A Snapshot

Note: The percentages represent the proportion of respondents who selected each option

Traveller Behaviours & Preferences

Top 3 Booking Factors (When choosing an Airline)

Australian Traveller



Singaporean Traveller

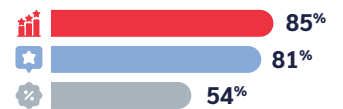


Chinese Traveller



Airline Reputation & Branding Promotions/Discounts Unique Offerings Positive Online Reviews

Top 3 Booking Factors (When choosing Accommodation)



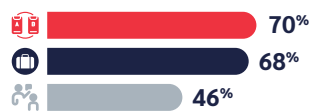
Accommodation Reputation & Branding Promotions/Discounts Unique Offerings Positive Online Reviews

Top 3 Booking Factors (When choosing a Travel Activity)



Brand Reputation Promotions/Discounts Unique Offerings Positive Online Reviews

Top 3 Research/Inspiration Sources



Review/Comparison Sites OTAs Word of Mouth Cashback/Loyalty Sites Travel Lifestyle Sites

Likelihood of Influencer Influence on Travel Decision



Very Likely + Likely Neutral

Direct Purchases Resulting from Influencer Recommendations in the Last 12 Months



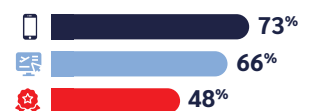
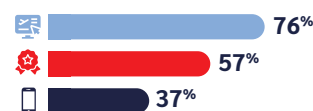
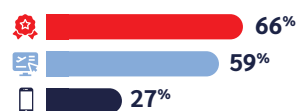
Yes No

Top 3 Most Trusted Sources of Travel Discovery



Comparison/Review Sites/Buyers Guides Organic Search Word of Mouth Travel Media Site Social Media - Organic Post

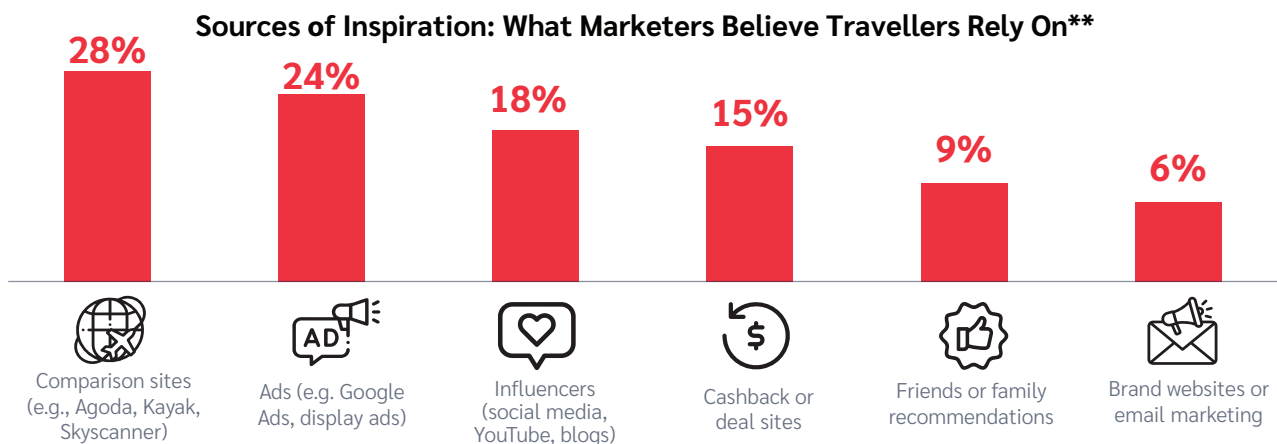
Top 3 Booking Channels



Brand.com OTAs Mobile App

How Do Marketers Think Travellers Discover Travel Brands?

We asked marketers about how travellers research their travel options. Overwhelmingly, they pointed to **Comparison Sites & Aggregators (28%)** as the most influential, followed by **Ads (24%)**. This highlights a belief in price transparency and the persuasive power of advertising.

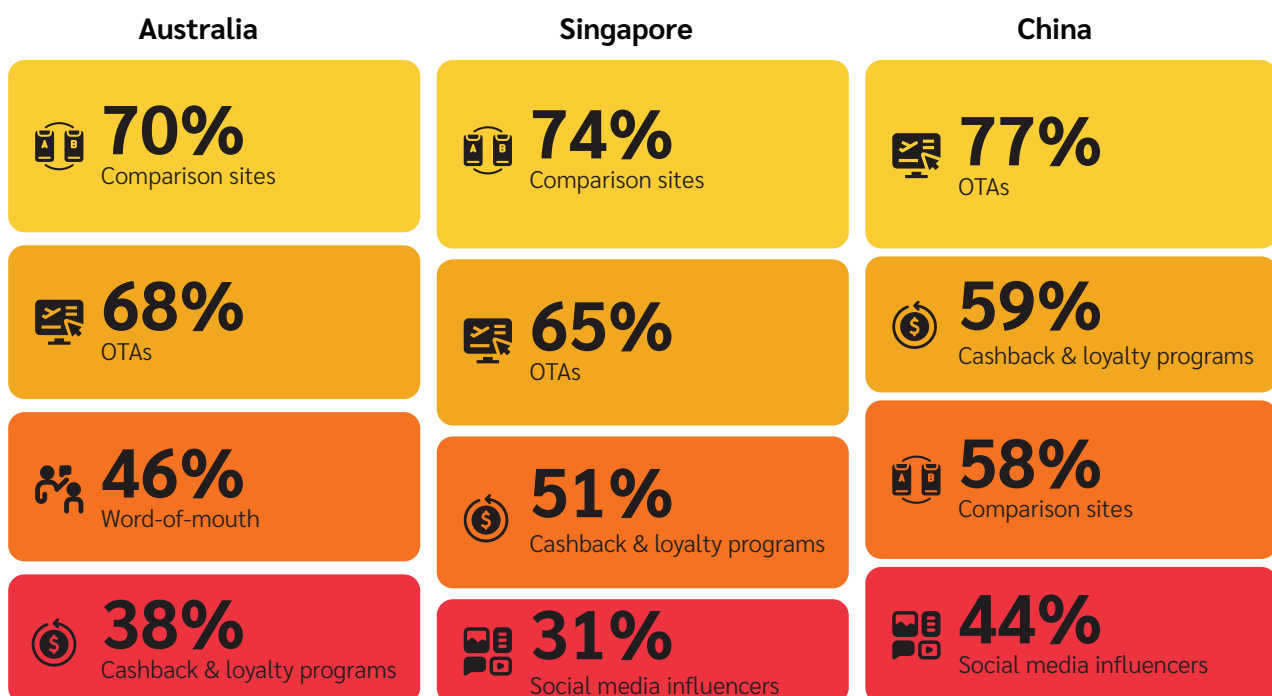


BUT — here's where the gap emerges. Marketers are betting on ads. But travellers are betting on trust.

⚠️ What Travellers Actually Use for Inspiration: The Disconnect

The survey result show marketers doubling down on paid ads. The consumer survey however suggest APAC travellers are turning to **trust-based sources**.

Which Of The Following Sources Do You Use For Research Or Inspiration When Booking Accommodation, Airline Or Travel Activity And Attraction That You Have Never Tried Before?*



*APAC refers to survey data captured specifically from consumers in Australia, Singapore, China

**This survey was conducted with 100 travel marketers across SEA. Respondents can choose their top 3 options, % is derived from dividing gathered responses for each option out of 300

From Awareness to Action: Where Travel Brands Are Missing the Mark

While ads still play a role in driving bookings, **rising costs are making ROI harder to justify**. Marketers also recognise that while **influencers (18%)** are effective for **building brand awareness**, they often fall short when it comes to **driving direct conversions**.

When it comes to channels driving actual bookings, travel marketers rank:

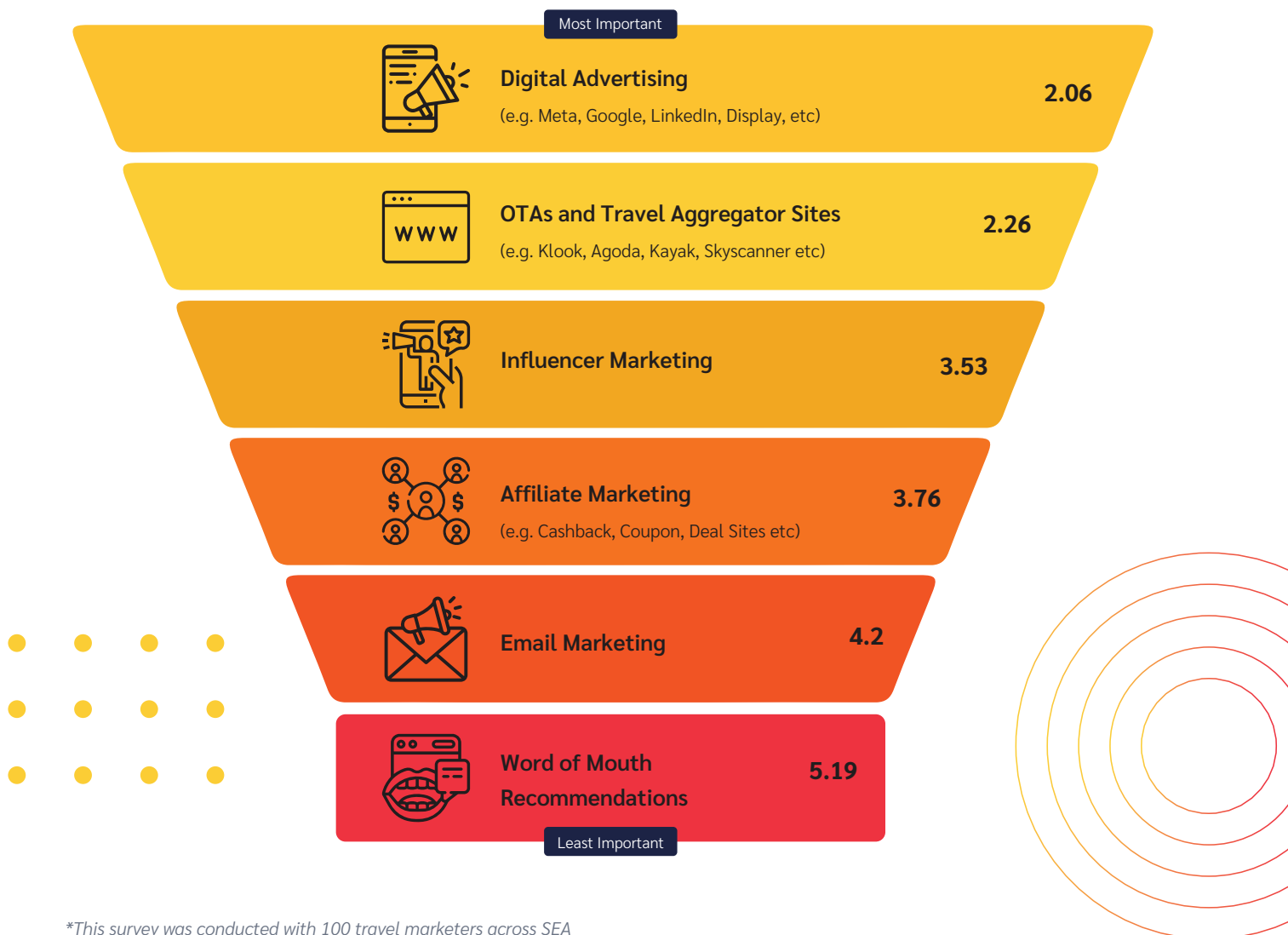
1. **Top performers:** OTAs and digital ads
2. **Mid-tier:** Influencers and affiliate marketing — valued more for consideration than conversion

What's the Opportunity?

Trust-based marketing remains massively under leveraged. **Peer recommendations and word-of-mouth** are among the most trusted sources for travellers — **Australia: 46%, Singapore: 40%, China: 34%**, yet many brands under invest in this area.

Where Online Bookings Occur: Marketing Channels That Boost Sales*

1= Most Important, 6 = Least Important



What Marketers Think Drives Travellers to Book

Marketing leaders identify **brand reputation & trust** as the top factor influencing traveller decisions, ranking it ahead of **price & promotions**. They also see **online reviews & ratings** as highly influential.

Which Factors Do You Believe Most Influence A Traveller's Booking Decision?*

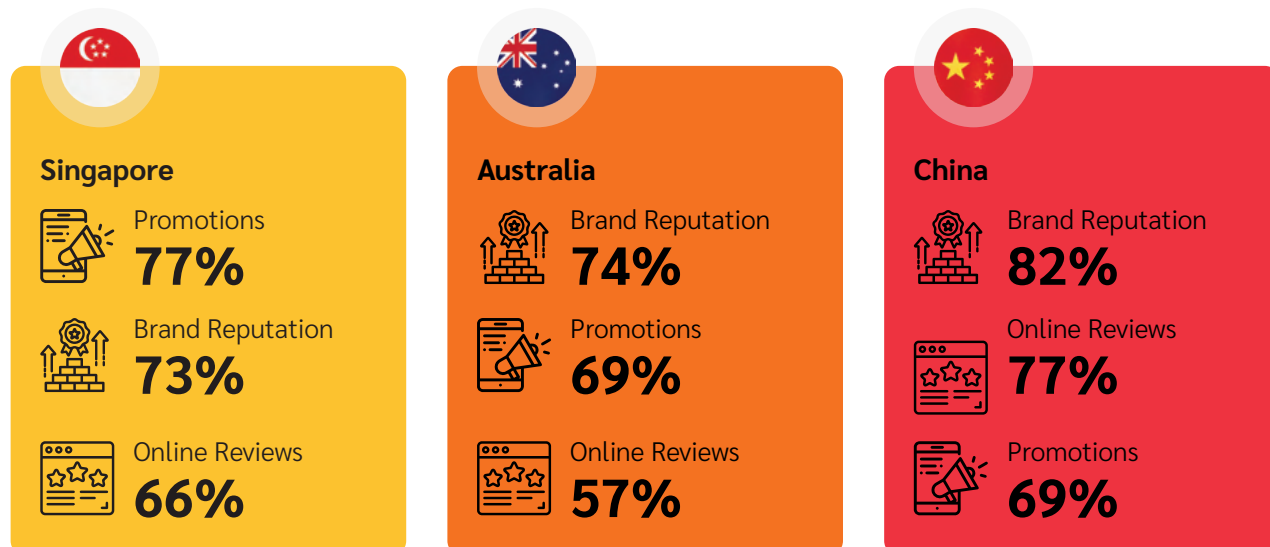
1 = Most Important, 6 = Least Important



Even as marketer perceptions largely reflect consumer behaviour, online reviews exert more influence on bookings than many brands account for—highlighting a prime opportunity to invest in reputation management and social proof.

Different Markets, Different Motivators: What Drives Bookings Across APAC?

Consumer data across markets largely supports the importance of brand reputation and trust — but priorities shift depending on the country and type of travel product.



Note: Unless otherwise stated, booking drivers reflect an average across airlines, accommodation, and travel activities

**This survey was conducted with 100 travel marketers across SEA*

The Opportunity: Diversifying the Marketing Mix

To optimise acquisition strategies, brands should:



Strengthen community driven efforts - Balance paid and organic marketing.



Amplify word-of-mouth - Leverage customer referral and advocacy programmes.



Partner with loyalty platforms, publishers, and content creators that align with your brand.

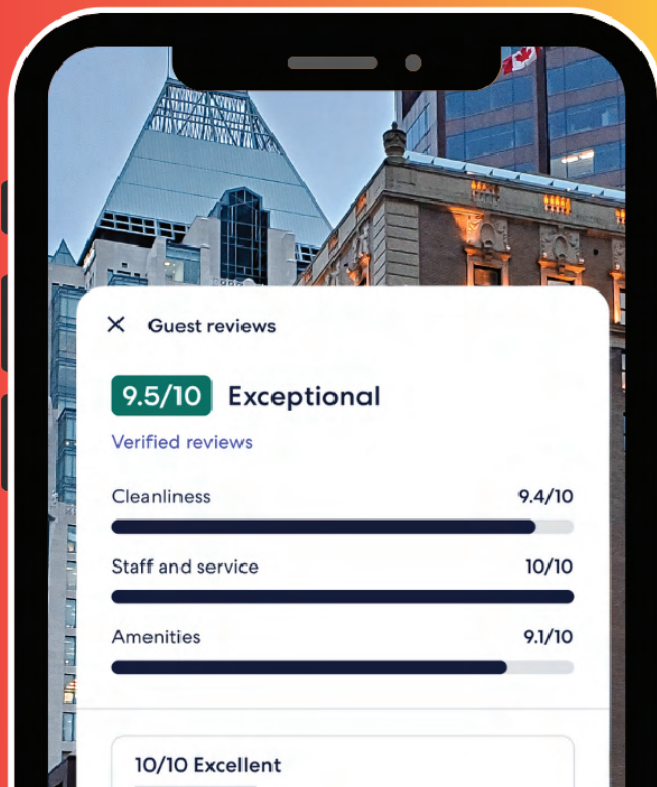
Diversifying beyond traditional ads, travel marketers can drive direct bookings, increase customer trust, and build long-term loyalty while optimising costs.

From First-Time Booking to Long-Term Loyalty

Beyond what initially drives bookings, repeat customers are becoming a critical growth lever for travel brands. Interestingly, **57% of travel marketers say that 26–50% of their bookings now come from repeat customers**; a clear sign that a strong referral and loyalty strategy can significantly reduce acquisition costs while building sustainable long-term value.

The Road Ahead: Winning the Evolving Traveller

To remain competitive, travel brands must **localise their messaging, pricing, and engagement strategies** while prioritising seamless, customer-centric experiences across online and offline interactions. Building strategic partnerships with trusted brands, publishers, and influencers will also be critical to strengthening credibility and expanding reach. By combining **smart data-driven insights** with **authentic customer engagement**, travel companies can forge stronger relationships, deepen brand trust, and unlock sustainable growth in an increasingly dynamic market.



CHAPTER 2:

The Role of Partnerships to Drive Growth

From TikTok travel reels, to review sites and influencer itineraries, **digital voices now shape where, how, and why people book**. In fact, 92% of younger travellers say their last trip was inspired by social media, highlighting the growing power of trusted, peer-driven content over traditional advertising.

For travel brands, this shift presents both an opportunity and a challenge.

Visibility alone isn't enough anymore. Travellers want authentic recommendations, social proof they can trust, and seamless booking experiences.

This is where **strategic, performance-based partnerships** come in - not just to create reach, but to build trust and convert inspiration into action. **Influencers, affiliates, OTAs,** and cross-brand collaborations are now **core players** in the booking journey.

But as brands invest more into partnerships, **key questions arise:** How do you select the right partners? How do you measure success? And how do you scale without losing control?

This chapter explores how leading travel brands are leveraging partnerships to drive direct bookings, strengthen loyalty, and maintain a competitive edge in an ever-evolving travel landscape.



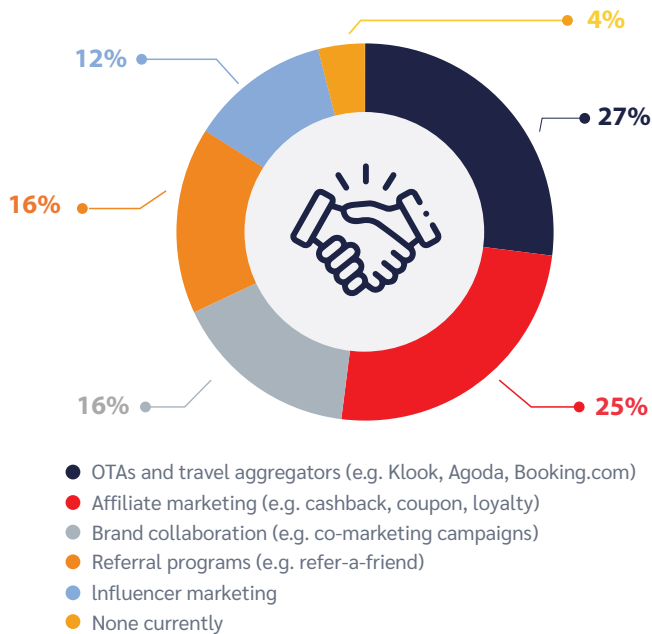
The future of travel marketing isn't owned. It's partnered.

Winning brands don't just build audiences—they build ecosystems.

How Travel Brands Are Allocating Investments in Strategic Partnerships

To maximise reach and ROI, travel brands are rethinking their partnership strategies; moving beyond traditional channels and doubling down on performance-based models that drive direct bookings.

What Type Of Partnerships Does Your Business Currently Invest In?*



*Not all reach is equal.
The smartest travel
brands only pay for
results.*

*Performance-based
partnerships turn
marketing from a cost
center into a
conversion engine.*

OTAs and Aggregators (e.g., Klook, Agoda, Booking.com) still play a major role, with **27%** of marketers naming them a top channel for reaching high-intent travellers.

But there's a catch: **rising commission fees (up to 30%)** are pushing brands to rethink the value exchange.

Instead of paying upfront, brands are embracing **affiliate marketing (25%)**, influencer partnerships, and cross-brand collaborations that reward **actual performance**—not just reach.

Why? These partnerships offer:

- **Lower risk:** You only pay when a booking happens.
- **Stronger control:** You retain the customer relationship.
- **High impact:** Cashback, loyalty, and deal-based offers drive conversions in a price-sensitive market.

Sustainable growth comes down to **choosing the right mix of partners**, **measuring success effectively**, and **optimising continuously**.

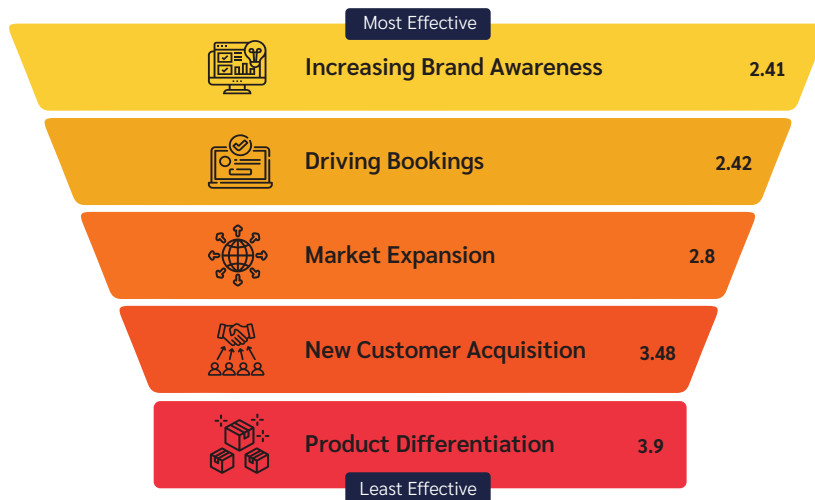
*This survey was conducted with 100 travel marketers across SEA. As there are 6 options in this survey question, % is derived from dividing gathered responses for each option out of 600



Mapping Partnerships to the Customer Journey

How Effective Have Your Affiliate And Influencer Marketing Programs Been In Achieving Your Business Goals?*

1 = Most Effective, 5 = Least Effective



Consumer trust in comparison and review sites when making a travel purchase decision is high — 59% in Australia, 68% in Singapore, and 72% in China. In China, more than 50% of consumers mention they have purchased from an influencer and will likely try a new airline, accommodation, or travel activity because of their recommendation.

Different types of partners play different roles across the traveller journey:



Increasing Brand Awareness:

Affiliates and influencers serve as trusted sources for discovery, inspiration, and recommendations—building credibility early.



Driving Bookings:

Influencers spark interest, but affiliates (cashback platforms, loyalty sites) are more effective at converting engagement into bookings by tying payouts directly to results.



Market Expansion:

Affiliates offer a low-risk, CPA-based model for market entry, while influencers can accelerate awareness depending on their reach.

What's the Opportunity?

Brands can embed affiliate links in travel content, and review platforms allowing them to capture traveller intent earlier in the buying journey. From social collaborations to exclusive brand partnerships, these efforts help brands remain top of mind.

The bottom line is, some partners excel at driving awareness at the top of the funnel, while others are better suited for conversions and direct bookings at the bottom. With the **right partnership platform** in place, marketers can **see, track, and reward** the true impact of each partner more effectively.



**This survey was conducted with 100 travel marketers across SEA*

Success Story



Virgin Australia achieves 71% increase in revenue quarter-over-quarter with a diversified partner mix

Virgin Australia runs a mature affiliate partnership program that has become a huge revenue-generating channel for them. The airline wanted to tap into new revenue streams to maximise the potential of the partnerships channel. Together with their agency partner and impact.com, they diversified their partner mix and increased the number of partners in their program by 168%. All of them have a strong brand affinity with the airline, including publishers and social media influencers with a large travel audience.

For example, Virgin Australia collaborated with Point Hacks to tap into their niche points-savvy audience to promote its Velocity Frequent Flyer [VFF] Program and help travellers move through the four tiers of Velocity status. Partners with an audience interested in a specific destination also helped drive bookings to desired routes.

As a result, together with impact.com, Virgin Australia achieved 71% increase in revenue quarter-over-quarter.



60%
more bookings



168%
Growth in active partners



71%
boost in revenue
quarter-over quarter



Skyscanner increases travel bookings by 77% by migrating and consolidating its partnership networks onto impact.com

Skyscanner, a metasearch engine in the travel space, works with a diverse partner mix and requires a payment model that rewards across multiple criteria, including traffic, redirect, bookings, and revenue. They needed a refreshed partnerships strategy and updated technology to **increase efficiency, improve partner management, and drive growth.**

After moving 12,000 affiliate partners onto a unified partnership management platform like impact.com, the increased efficiency allowed Skyscanner to deliver stunning results post-migration.

This includes:



77%
more bookings



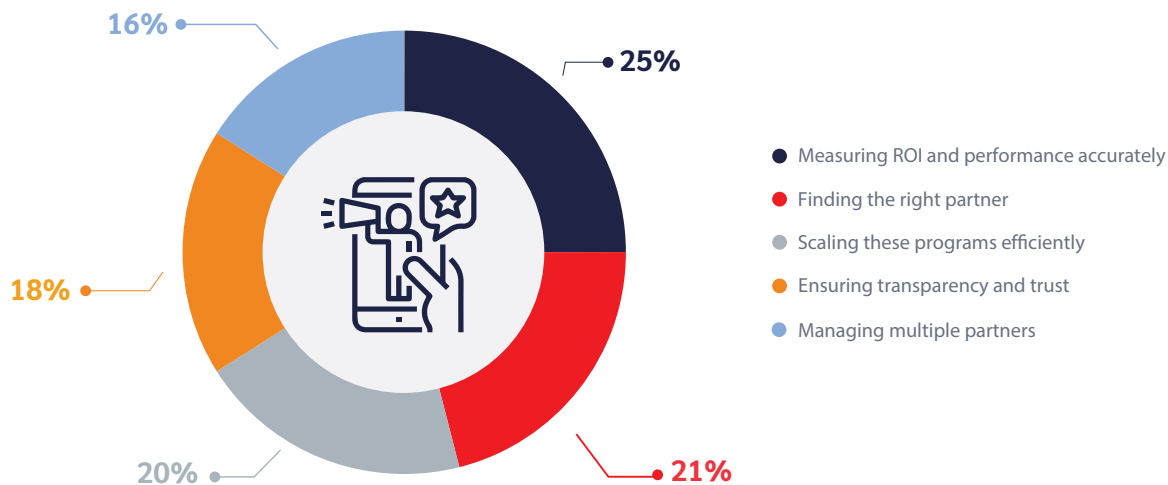
19%
increase in revenue



33%
higher return on
investment (ROI)

Why Are Partnerships Still Hard to Get Right?

What Are The Biggest Challenges You Face When Running Your Affiliate And Influencer Marketing Programs?*



Building partnerships is easy. Scaling them and proving their value is the real challenge.

Despite the opportunities, marketers continue to face key hurdles that limit the impact and scalability of partnership programs.



Measuring ROI and Performance Accurately:

Traditional attribution models struggle to capture the long-term value of affiliate and influencer-driven content. Unlike paid ads, their impact extends beyond immediate conversions, making it harder to tie upper-funnel influence to lower-funnel bookings. Many brands still rely on outdated metrics, leading to undervaluation and missed opportunities.



Finding the Right Partners:

As the partnership ecosystem expands, spanning influencers, publishers, co-brands, and even non-traditional collaborators like charities - brands face the challenge of identifying who delivers real value. The key is moving beyond just conversion metrics to understand which partners influence different stages of the customer journey.



Scaling These Programs Efficiently:

Managing multiple programs across regions, currencies, and languages is complex. With different partners contributing to awareness, engagement, and conversions, brands need clear frameworks for resource allocation, performance tracking, and strategic alignment—without drowning in manual processes.

*This survey was conducted with 100 travel marketers across SEA

As there are 5 options in this survey question, % is derived from dividing gathered responses for each option out of 500

ONE PLATFORM, EVERY PARTNER: POWERING SCALABLE GROWTH WITH PRECISION

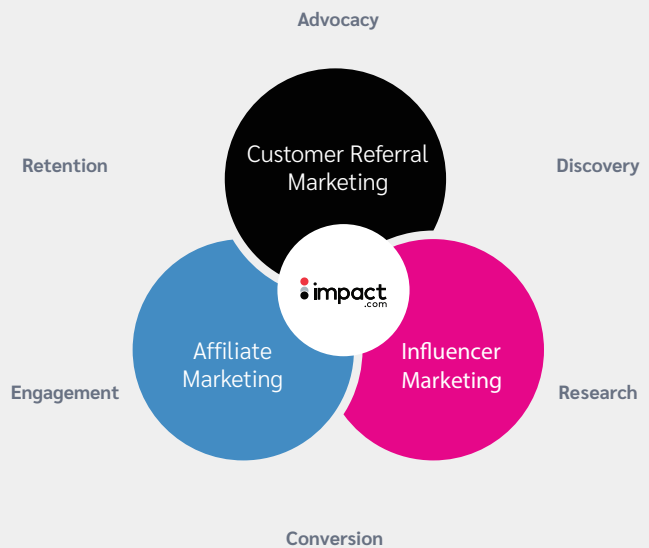
Expand Your Reach And Revenue With Diverse Partnerships

Brands need the flexibility to engage with various partner types. Each type offers unique benefits:

- ✓ Affiliates drive sales
- ✓ Influencers amplify reach
- ✓ Customer referrals bring in new clients

Diversifying your partnership strategy taps into multiple revenue stream end enhances market presence.

A unified platform allows seamless tracking, reporting, and optimisation, ensuring cohesive and data-driven marketing efforts. This approach simplifies management and provides valuable insights, helping you allocate resources effectively and scale partnerships for growth - impact.com makes this possible.



✓ Reliably track everything across channels and dedupe unnecessary spend.

✓ Seamlessly track the complete customer journey across channels and devices.

✓ Get industry-leading tracking across mobile, mobile web, and web.

✓ Easily monitor and track your performance and see which partners are providing the most value.

Marketplace and Discovery Tool

Access a wide world of publishers directly or through impact.com's marketplace.

- Discover your best brand advocates with more than 330k vetted affiliates, pre-screened, and verified
- Enhanced profiles and granular filtering for easy decision making
- One login, work across partner types from creators to cashback sites and, geographies
- Promote your program in the marketplace and develop a customised brand experience to attract direct partners

Partnership Automation to Scale Efficiently



Streamline your workflow and manage multiple programs from a single account, all while meeting the needs of your finance team. Access integrated reporting across partnerships, geographies, and cross-functional teams.



Align compensation with highest value - Adjust payouts and manage terms at the category, SKU, and promo-code level.

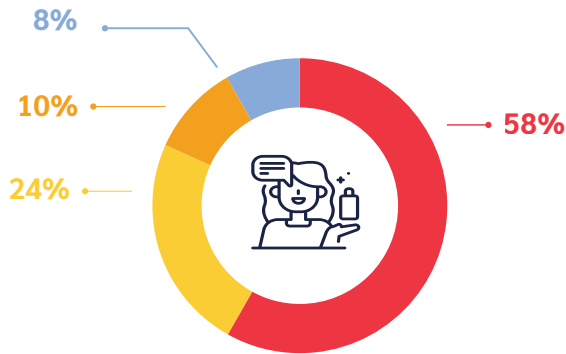


Pay partners quickly, accurately, and transparently. Pay partners with impact.com's global clearinghouse- without relying on third party payment platforms. Streamline and automate invoice generation, tax processing, currency management, and payment processes.

Why the Future of Partnerships is Tech-Driven

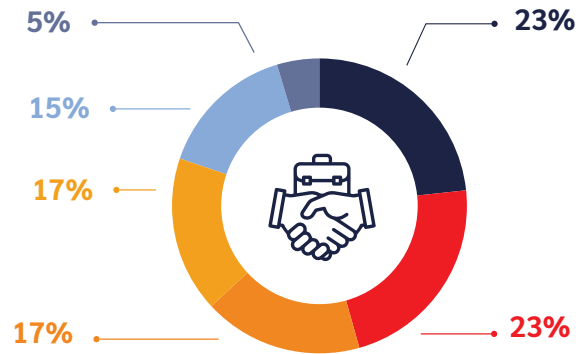
As travel brands scale their partnership programs, technology is no longer optional, it's the engine that drives efficiency, accuracy, and growth.

Are You Considering Technology Investment To Scale And Optimise Your Affiliate And Influencer Marketing Programs Within The Next 12 Months?**



- No, we do not see a need for additional technology at this time
- Yes, we are actively exploring partnership management platforms
- No, we manage partnerships manually but may consider tech investment in the future
- No, we already are using a partnership management platform

Which Factors Would Most Influence Your Decision When Choosing A Partnership Management Platform?***



- Reduction in commission leakage and payment inefficiencies
- Need for better tracking and attribution of partner-driven bookings
- Centralised management of multiple affiliate, influencer, and brand partnerships
- Access to better data, insights, and performance analytics
- Ability to scale partnerships without increasing operational workload
- Improved fraud prevention and compliance monitoring

Key Priorities for Travel Marketers

Automation as a Priority:



Marketers are prioritising automation to streamline workflows, reduce manual management, and scale faster without disrupting existing systems. However, 21 respondents still manage partnerships manually and may consider tech investments cautiously.

Fraud Prevention and Compliance Monitoring:



Built-in tracking, auditing, and verification tools are essential to validate partner-driven conversions and protect brand integrity.

Scaling Partnerships Without Increasing Workload:



Platforms that streamline contract management, payments, and performance tracking are in demand. Integrations with CRM providers and other marketing tools is critical for smooth data flow.

***This survey was conducted with 100 travel marketers across SEA; respondents can choose their top 3 options, % is derived from dividing gathered responses for each option out of 300

Partnerships as a Competitive Engine

With these tech-driven efficiencies in place, partnerships have become a critical growth engine in today's evolving travel landscape. As brands shift budget from traditional advertising to performance-based partnerships, the ability to efficiently manage and accurately measure them is more important than ever. The right technology empowers brands to enhance operational efficiency, track performance, and optimise ROI, helping them scale partnerships without increasing workload.

This data-driven approach positions travel brands for sustainable, long-term success in a highly competitive market.



CHAPTER 3:

Travel Marketers Are Doubling Down

In today's dynamic landscape, standing still isn't an option. Faced with rising acquisition costs and rapidly shifting consumer behaviour, travel marketers are doubling down; not by spending more, but by investing smarter. Industry giants like Airbnb, Booking Holdings, Expedia Group, and Trip.com Group spent a combined \$17.8 billion on marketing last year, underscoring just how fierce the competition for customer loyalty has become.

The New Focus?

Targeted, high-impact strategies that deliver immediate conversions, strengthen customer retention, and future-proof growth. This chapter explores where leading brands are shifting their spend, how they're rethinking the channel mix, and what smart investment looks like in the next era of travel marketing.

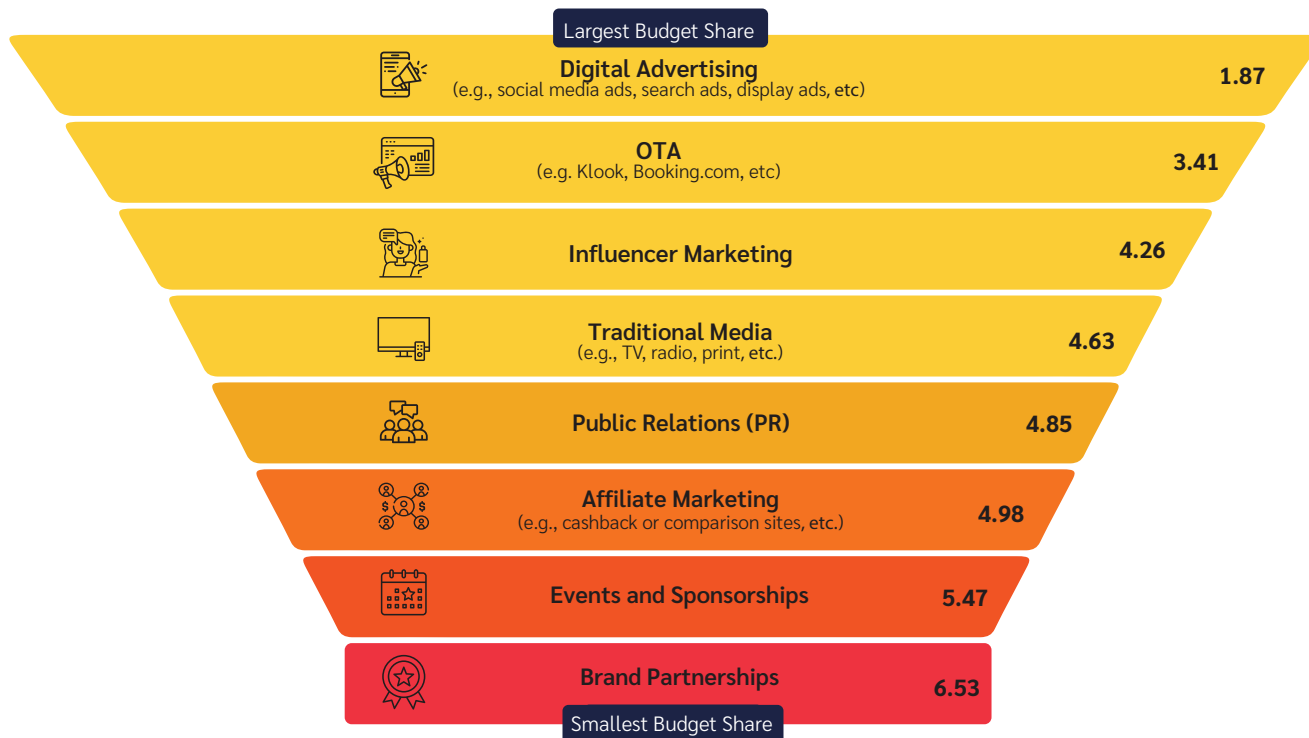


In travel marketing today, it's not about who spends most — it's about who invests best.

How Are Travel Marketers Spending?

How Is Your Marketing Budget Primarily Allocated Across Channels?*

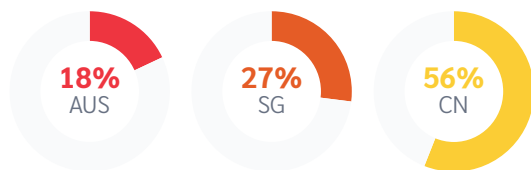
1 = Largest Budget Share 8 = Smallest Budget Share



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.

Where Consumers Place Their Trust*



Digital Advertising

Remains a major spend area, but trust in paid media is declining (Australia: 18%, Singapore: 27%, China: 56%) trust ads for travel information. Marketers are becoming more selective with paid media budgets to avoid wasted spend.



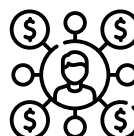
OTAs

Despite a push for direct bookings, OTAs remain crucial for new customer acquisition. High trust in comparison platforms (Australia: 70%, Singapore: 68%, China: 79%) ensures that OTAs still secure a significant share of marketing investment for immediate conversion.



Word of Mouth

Growing consumer trust in word-of-mouth (Australia: 68%, Singapore: 63%, China: 75%) is pushing brands to deepen long-term influencer partnerships, focusing on trust, emotional connection, and loyalty.



Affiliate Marketing

Remains a high-trust channel for customer acquisition (Australia: 47%, Singapore: 56%, China: 71%**). Brands are exploring cross-industry collaborations and bundled offers to maximise affiliate value while keeping credibility and authenticity at the core.

The Value of Price Sensitivity and Personalised Discounts

At the end of the day, inflation and value-conscious consumers are shifting the landscape. Brands are offering targeted promotions and personalised deals to drive immediate conversions without inflating marketing costs.

*This survey data was captured from consumers in Australia, Singapore, and China

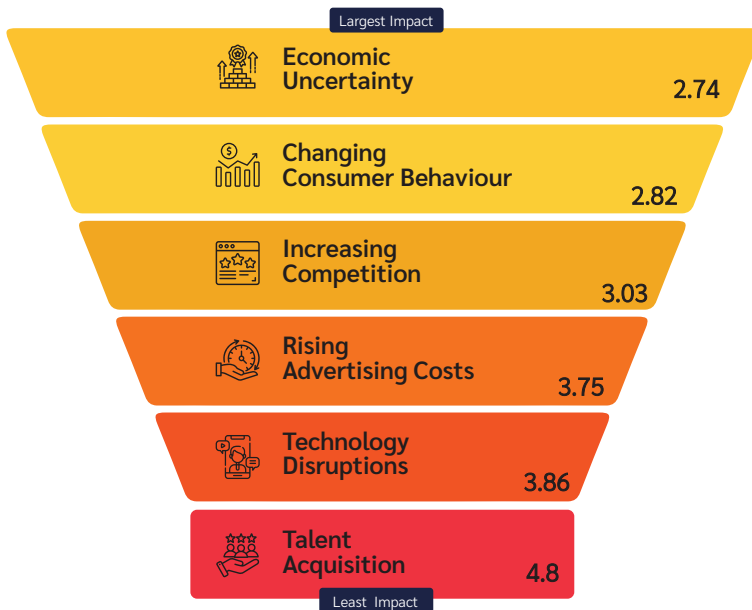
**The consumer trust percentages for Affiliate Marketing were calculated by taking the average of responses indicating high trust (scores of 4 and 5) across two related categories: Cashback site/ Loyalty program/ Rewards and Comparison/ Review sites/ Buyers guide.



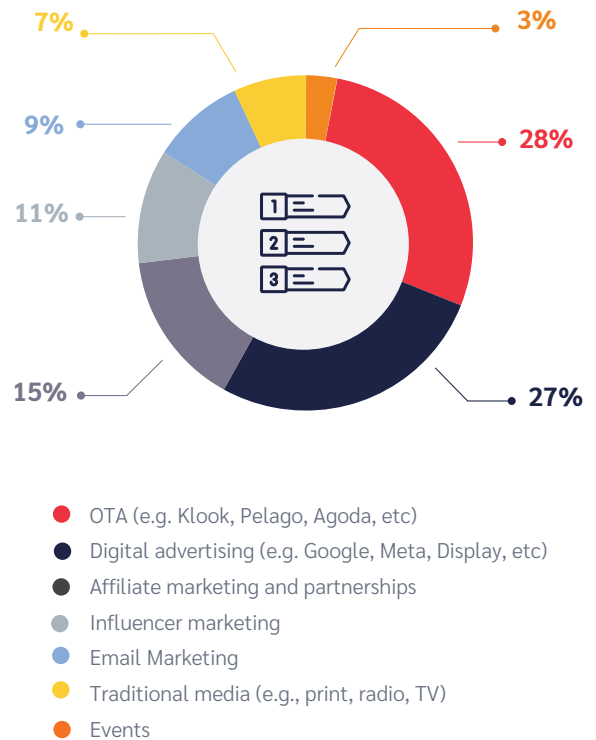
Where Challenges Become Growth Opportunities

Top Challenges For Travel Marketers*

1: Largest Impact 6: Least Impact



Where Travel Marketers Are Investing



In an unpredictable market, brands that diversify today will dominate tomorrow.

While strong traveller demand continues with 316 million trips booked to Asia Pacific last year, travel brands face growing external pressures that can't be ignored: Economic uncertainty, intensifying competition, and rapid shifts in consumer behaviour.

In this shifting environment, where brands double down will determine their long-term success.

Today, OTAs (28%) and digital advertising (27%) remain crucial for immediate conversions. However, rising acquisition costs and dependency risks are pushing brands to diversify towards affiliate partnerships (15%) and influencer marketing (11%).

These trust-based channels offer a pathway to sustainable, cost-efficient customer growth over the next 12 months.

*This survey was conducted with 100 travel marketers across SEA Respondents must choose their top 3 options, % is derived from dividing gathered responses for each option out of 300

The Future of Travel Marketing: Smarter, Strategic and Customer-Led

To sustain growth amid uncertainty, travel marketers must evolve beyond reactive tactics and lean into strategic, customer-centric planning. The future belongs to brands that offer value-driven experiences aligned with rapidly changing traveller behaviours.

Here's what winning brands are prioritising:



Personalised Offers:

Leverage data to deliver hyper-relevant promotions that resonate across demographics and touchpoints — not just by location, but by intent.



Localised Strategies:

Recognising regional nuances is critical for conversions. Australian travellers prioritise promotions and brand reputation; Singaporean consumers rely heavily on online reviews; and Chinese travellers are deeply influenced by social media and mobile-first experiences. Brands that tailor their approach to these distinct behaviours won't just connect better — they'll convert faster.



Optimising Distribution Channels:

Deliver a seamless journey across both direct and third-party platforms from discovery to booking to maximise immediate conversions and build long-term loyalty.



Invest in Technology and Automation:

Adopt AI-driven personalisation, MarTech platforms, and mobile-first experiences to drive smarter engagement, greater efficiency, and scalable customer insights.



Proactively Owning Customer Relationships:

As third-party cookies fade, direct engagement is the new competitive advantage. Brands must take control of customer relationships, adapt quickly, and create loyalty by consistently delivering relevance and value.

The next era belongs to brands who invest with purpose.



To stay ahead, travel brands must stop reacting and start leading — by aligning strategies with shifting behaviours, personalising experiences, and diversifying investments. Those who move first will transform today's challenges into tomorrow's competitive advantage.

The Brands that Lead will Invest Differently

Sustainable growth won't come from bigger budgets, it will come from better choices.

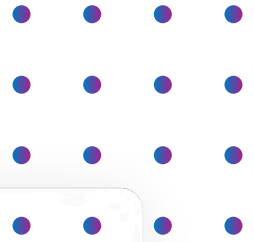
In a market shaped by rising costs and shifting behaviours, the brands that thrive will be those that:

- Invest in trusted channels like OTAs, affiliates, and influencers
- Prioritise strategic long-term partnerships over short-term wins
- Diversify beyond traditional paid media to build deeper loyalty

By aligning marketing strategies to real consumer behaviour not legacy tactics, travel brands can build stronger loyalty, lower acquisition costs, and lead the next wave of growth.



About Us



The world's leading partnership management platform, is transforming the way businesses manage and optimise all types of partnerships—including traditional rewards affiliates, influencers, commerce content publishers, B2B, and more. The company's powerful, purpose-built platform makes it easy for businesses to create, manage, and scale an ecosystem of partnerships with the brands and communities that customers trust to make purchases, get information, and entertain themselves at home, at work, or on the go. To learn more about how impact.com's technology platform and partnerships marketplace is driving revenue growth for global enterprise brands such as Virgin Australia, Qatar Airways, Malaysia Airlines, KK Day, Skyscanner, Airbnb, Anantara Resorts and more.

Visit www.impact.com



Digital Travel Insights delivers in-depth research, expert analysis, and fresh perspectives on the trends shaping the travel industry across Asia and beyond. We provide valuable intelligence that helps airlines, hotels, OTAs, and travel brands stay ahead in a fast-moving market.

Through data-driven content and industry collaborations, we empower travel leaders to make smarter decisions and drive meaningful results.

Our services include:

- Exclusive reports and whitepapers
- Benchmarking studies
- Webinars and expert-led discussions
- Infographics, articles, and videos
- Lead generation campaigns tailored to your goals

Visit www.digitaltravelapac.wbresearch.com

Survey Data and Methodology

Digital Travel Insights conducted research among 100 eCommerce leaders, Performance Marketing, Affiliate Marketing, Chief Marketing Officers, Chief Customer Officers, VPs of Brand Marketing and Customer Engagement. Across 6 markets including Singapore, Malaysia, Indonesia, Philippines, Thailand, Vietnam, the survey findings were gathered between February 12, 2025, and February 21, 2025. Ranging from a wide range of industries, they pulled data from respondents who work at Travel & Hospitality industries, including airlines, accommodations, attractions and activity sites. They have an annual revenue of at least USD\$3 million.

impact.com conducted their consumer insights survey targeting 400 respondents each from China, Australia, and Singapore, with an equal distribution of male and female participants. The age range is between 18 and 99. Their survey methodology relies on partners that enable them to integrate surveys directly into both mobile apps and web apps. Users receive a prompt and can voluntarily participate, often incentivised with in-app rewards. After collecting the results, they went through a post-survey validation process. This includes data consistency checks and statistical analysis to remove low quality responses. Data was also cross-checked with known patterns to ensure reliability and filter out responses from potential bots or duplicate users.

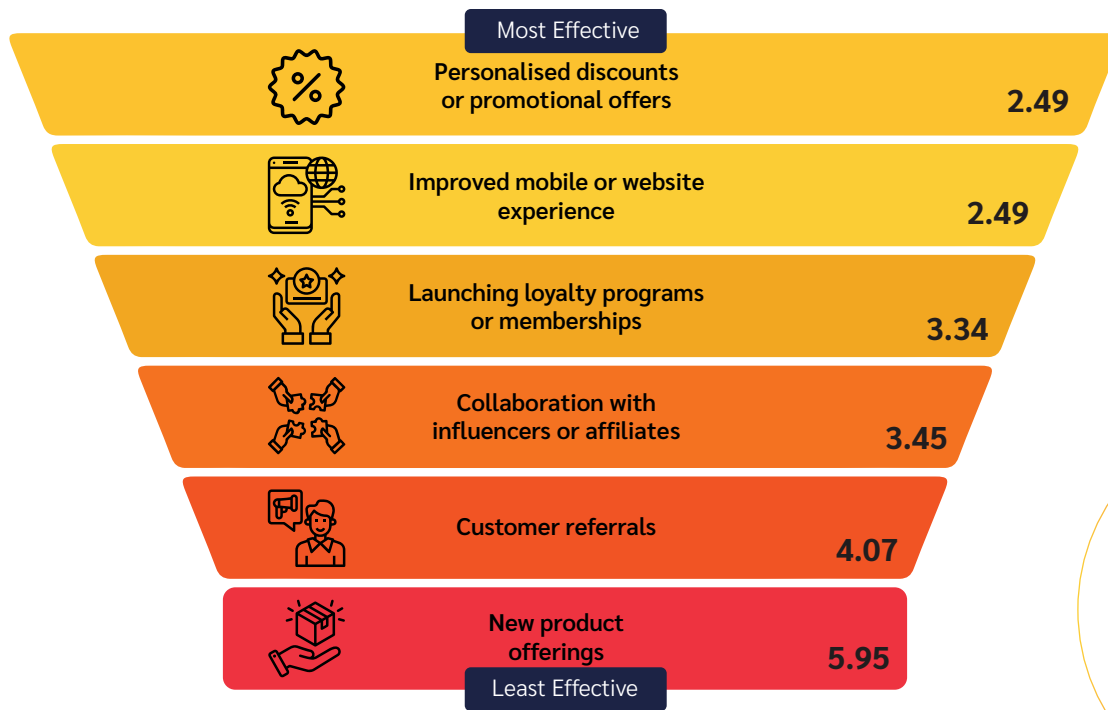


Market Research Results from Southeast Asia Travel Leaders

Profitable Marketing Strategies

What Strategies Have Been Most Effective For You In Driving Bookings In The Past Year?

1 = Most Effective, 6 = Least Effective



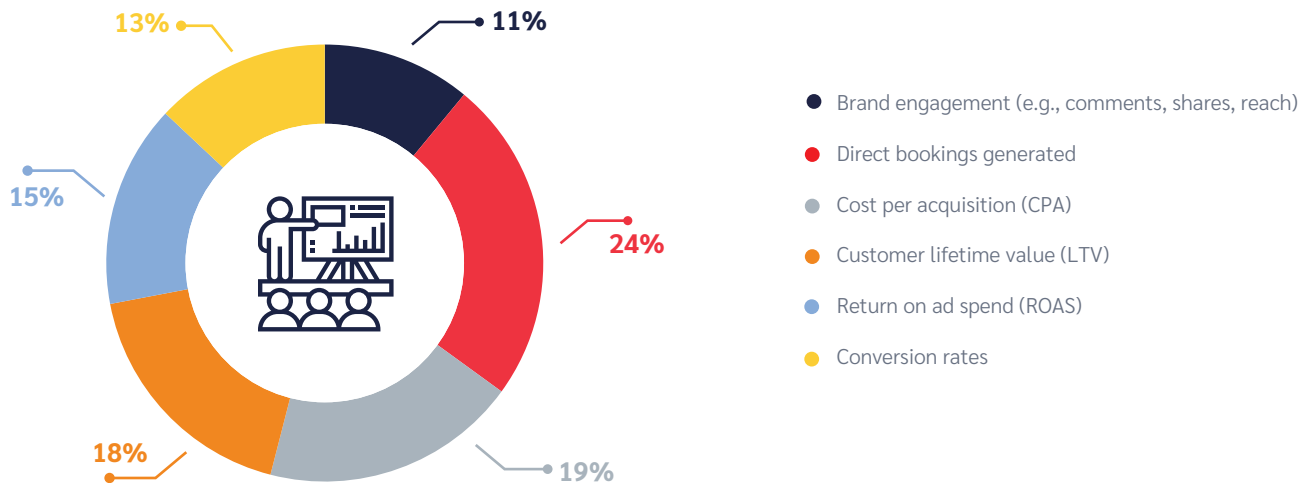
Barriers to Conversions

What Are The Biggest Challenges You Face When Trying To Increase Bookings?

1 = Biggest Challenge, 6 = Smallest Challenge



What Metrics Are Most Important To You When Measuring The Success Of Your Affiliate And Influencer Marketing Programs?

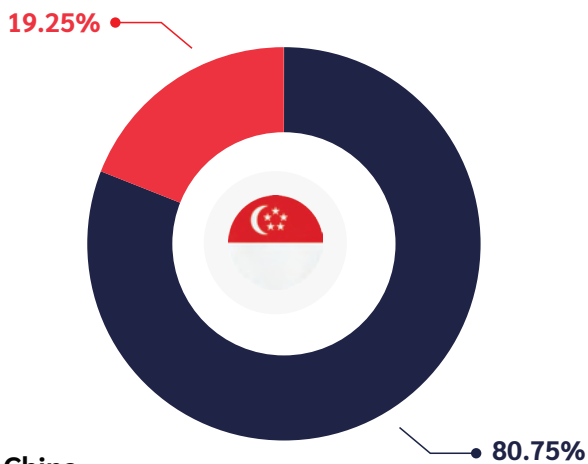


Consumer Insights Survey Results

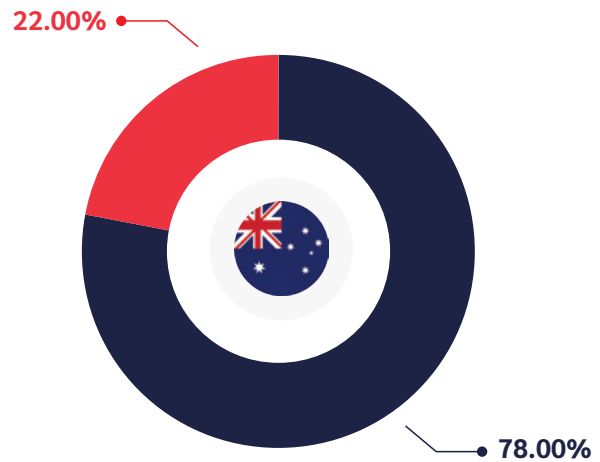
Online Travel Bookings Made in the Past Year

Have You Made Any Travel-related Purchases Online In The Past 12 Months?
(E.g. Flights, Accommodation, Travel Activities, Or Attractions)

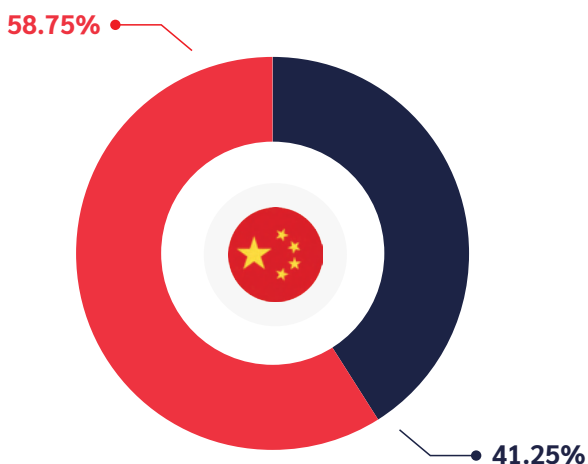
Singapore



Australia



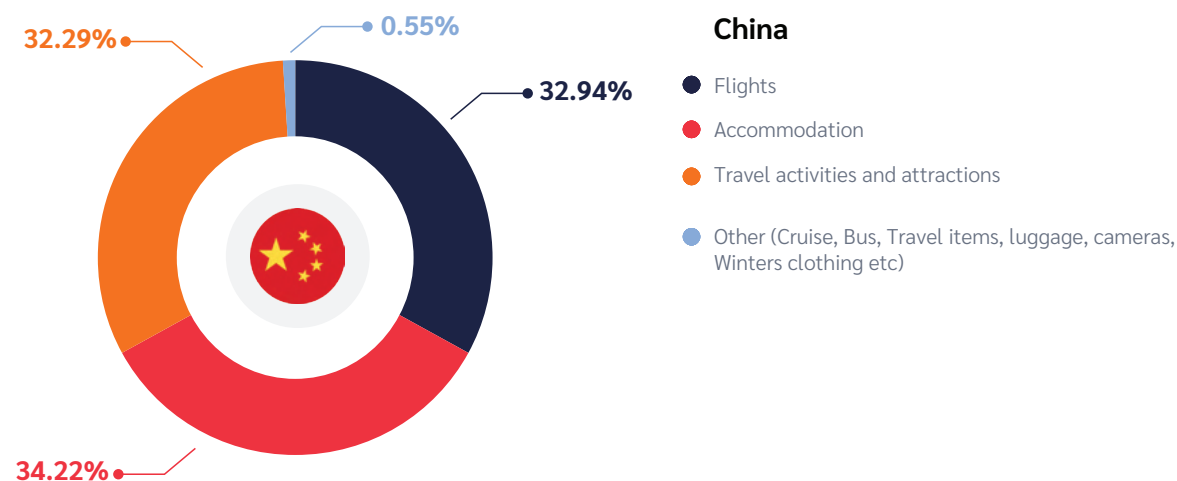
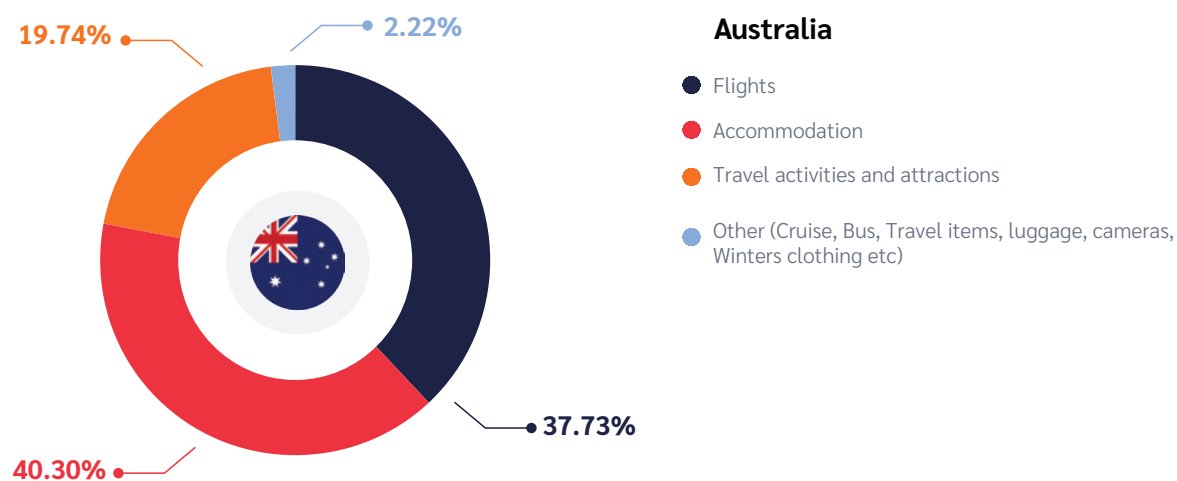
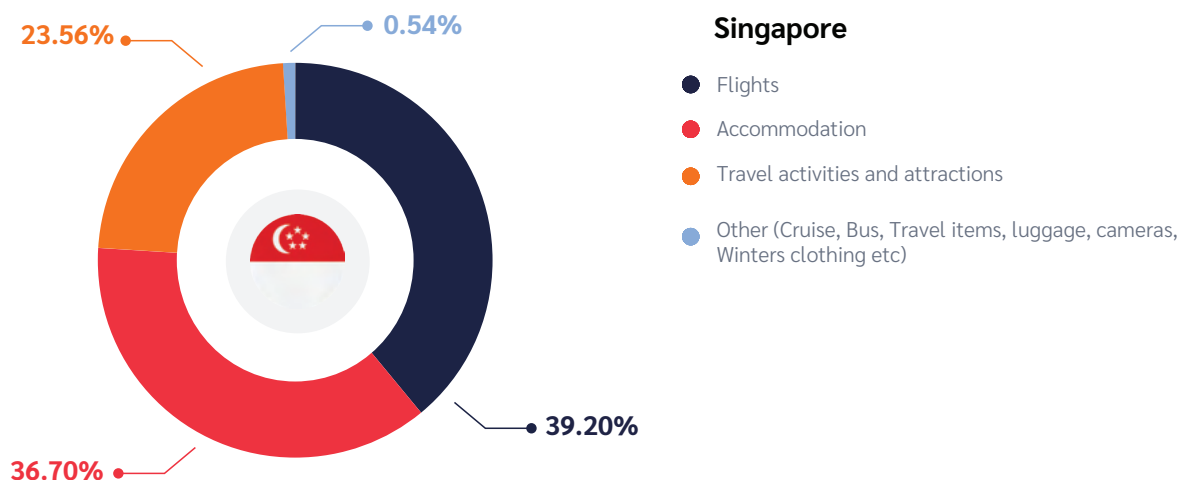
China



- I have made a travel-related purchase online in the past 12 months
- I have made a travel related purchase offline in the past 12 months
- I have made travel related purchases through both online and offline channels in the past 12 months
- I have not made any travel related purchases in the past 12 months

Types of Purchases

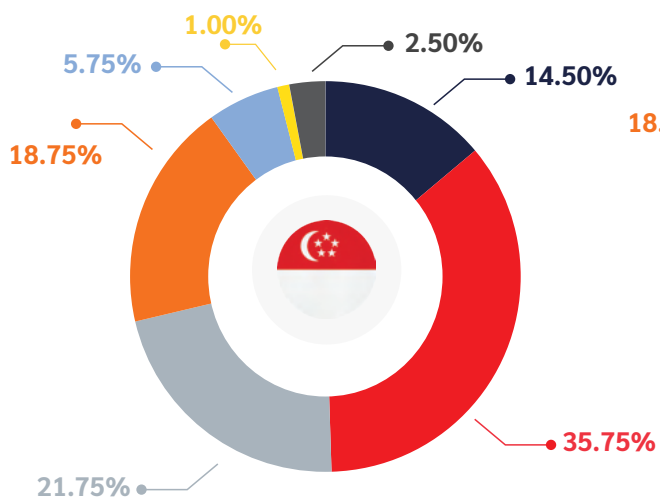
Which Of The Following Travel Categories Have You Purchased Online In The Past 12 Months? Excludes Business Travel Purchases.



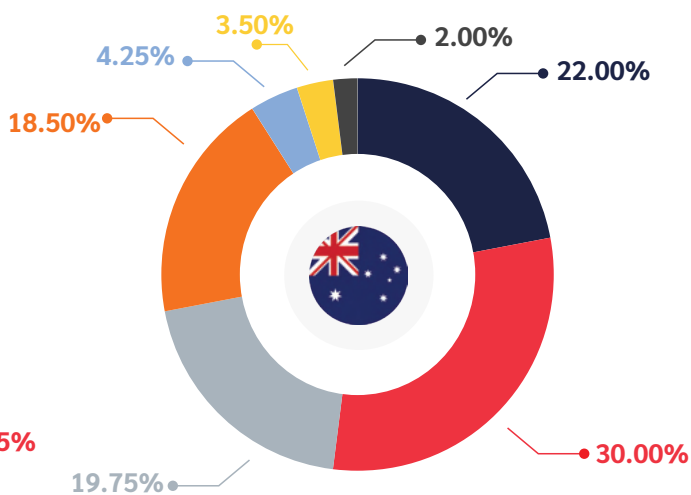
Frequency of Online Bookings

On Average, How Many Times Do You Make Travel-Related Purchases Online In A Year? (E.g. Airline, Accommodation, Travel Activities And Attractions)

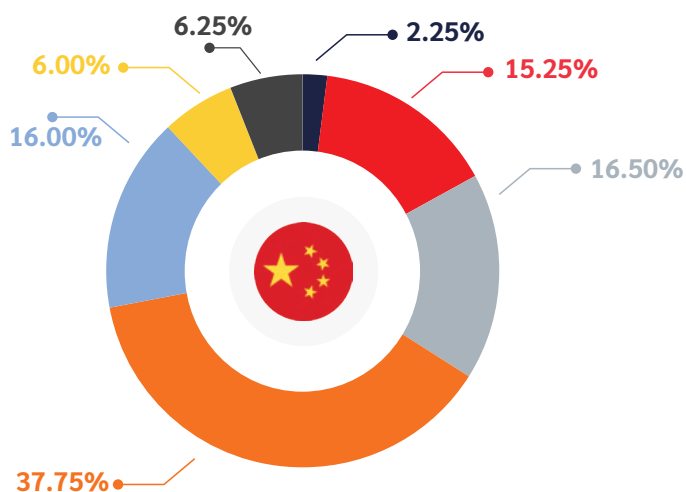
Singapore



Australia



China

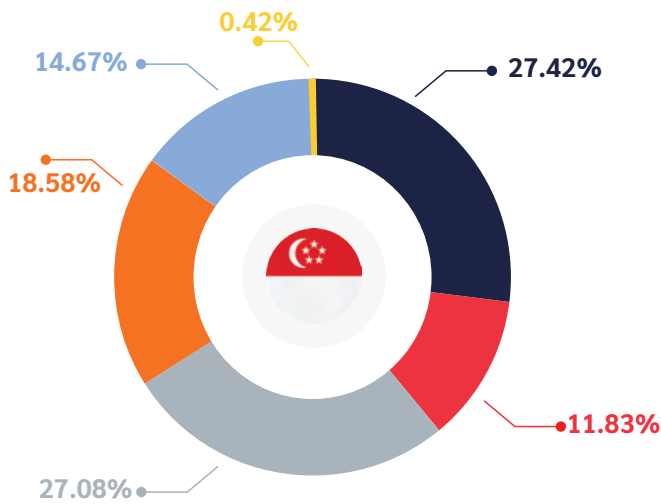


- 1 time
- 2 times
- 3 times
- 4-5 times
- 6-7 times
- 8-10 times
- More than 10 times



Driving Factors Behind Every Booking

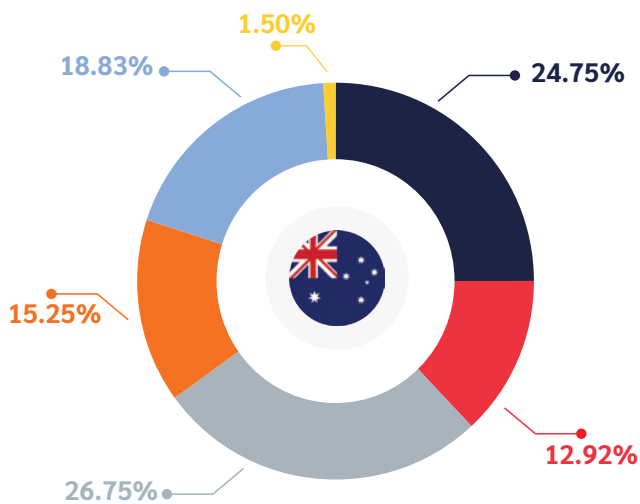
Airlines



Singapore

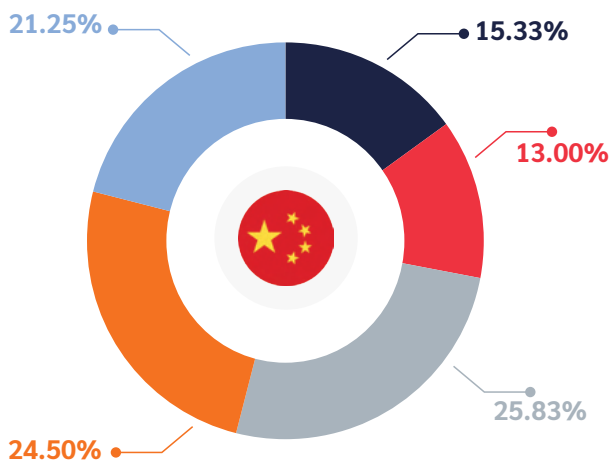
- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc)
- Airline reputation and branding
- Positive online reviews
- Unique product offerings (e.g. extra leg room, free cancellation, meal options, etc)
- Other (Price/Miles/Need/Simplicity)

Australia



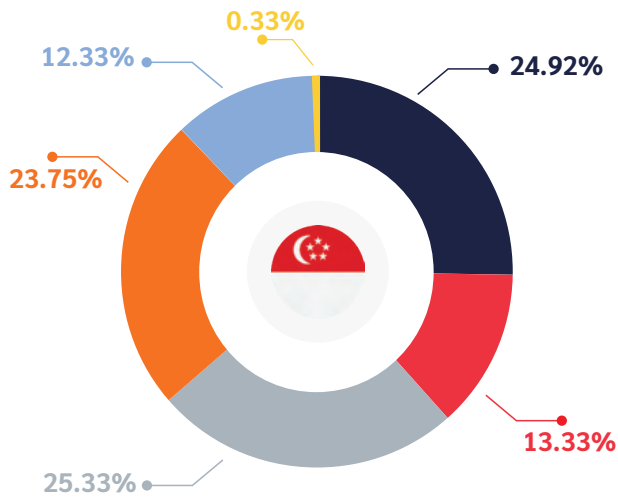
- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc)
- Airline reputation and branding
- Positive online reviews
- Unique product offerings (e.g. extra leg room, free cancellation, meal options, etc)
- Other (The one I always use, Cost and schedules, Rewards Program, Past Experience, Price)

China



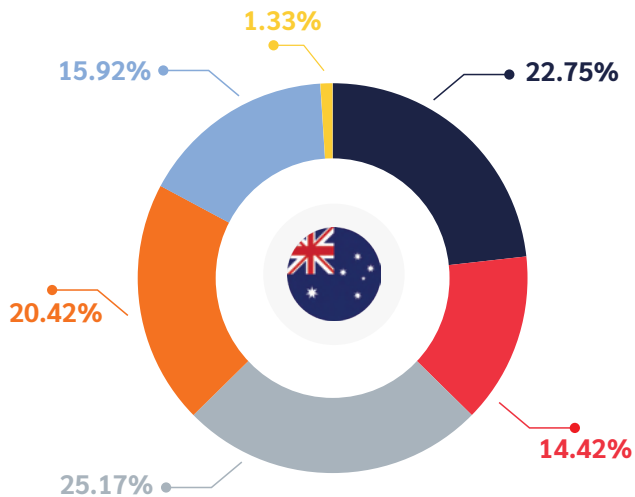
- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc)
- Airline reputation and branding
- Positive online reviews
- Unique product offerings (e.g. extra leg room, free cancellation, meal options, etc)

Accommodation



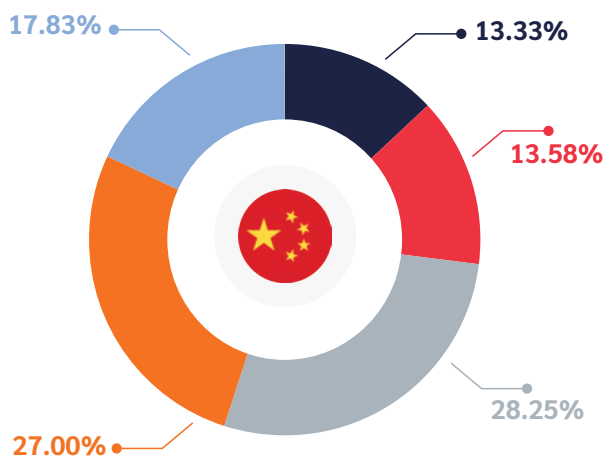
Singapore

- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc.)
- Accommodation reputation and branding
- Positive online reviews
- Unique product offerings (e.g. spa and wellness facilities, gym or fitness centre, high speed Wi-Fi, etc.)
- Other (Location/Price Point)



Australia

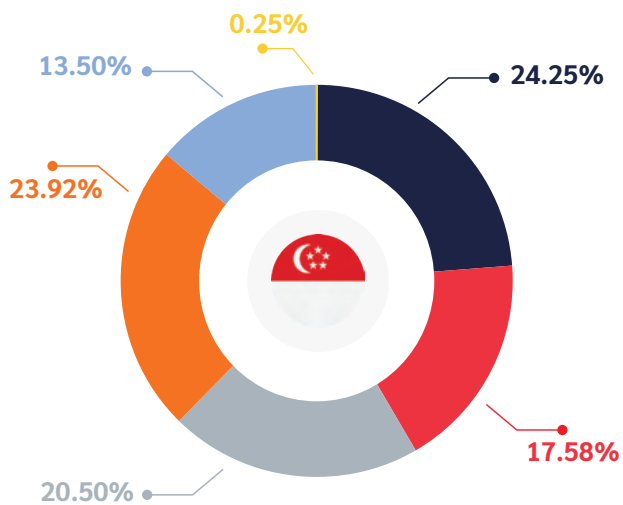
- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc.)
- Accommodation reputation and branding
- Positive online reviews
- Unique product offerings (e.g. spa and wellness facilities, gym or fitness centre, high speed Wi-Fi, etc.)
- Other (Past Experience, Handicap Facilities, Rewards Program, Location, Cost, Tourist Kiosks, Closeness to Cruise Terminal)



China

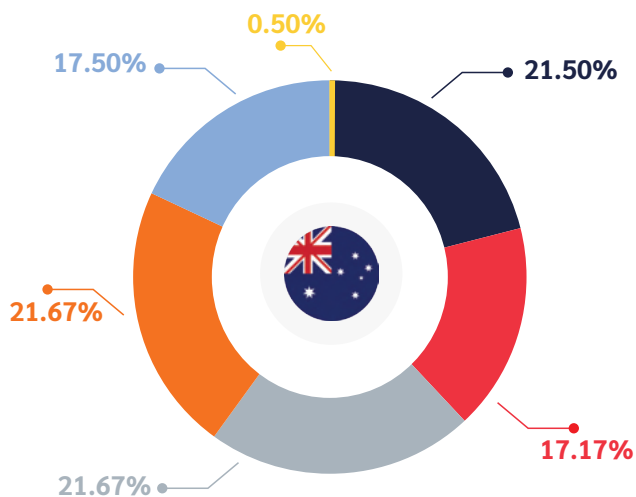
- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc.)
- Accommodation reputation and branding
- Positive online reviews
- Unique product offerings (e.g. spa and wellness facilities, gym or fitness centre, high speed Wi-Fi, etc.)

Attractions



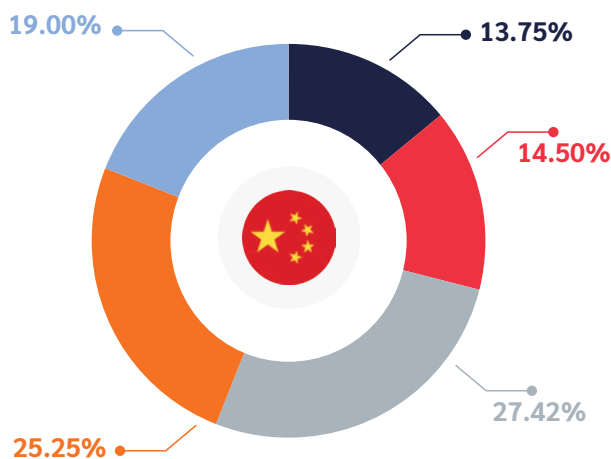
Singapore

- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc)
- Tour / activity provider reputation and branding
- Positive online reviews
- Unique product offerings (e.g. skip-the-line access, free cancellation, etc.)
- Other (Location/Price Point/Preference)



Australia

- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc)
- Tour / activity provider reputation and branding
- Positive online reviews
- Unique product offerings (e.g. skip-the-line access, free cancellation, etc.)
- Other (Price, Handicapped Facilities, don't book Tourist Traps)

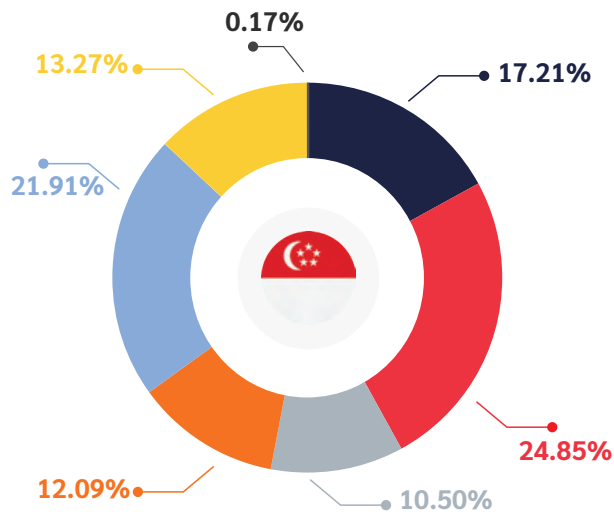


China

- Promotions or discount codes
- Recommendation from someone you know (e.g. friend, family member, influencer, etc)
- Tour / activity provider reputation and branding
- Positive online reviews
- Unique product offerings (e.g. skip-the-line access, free cancellation, etc.)

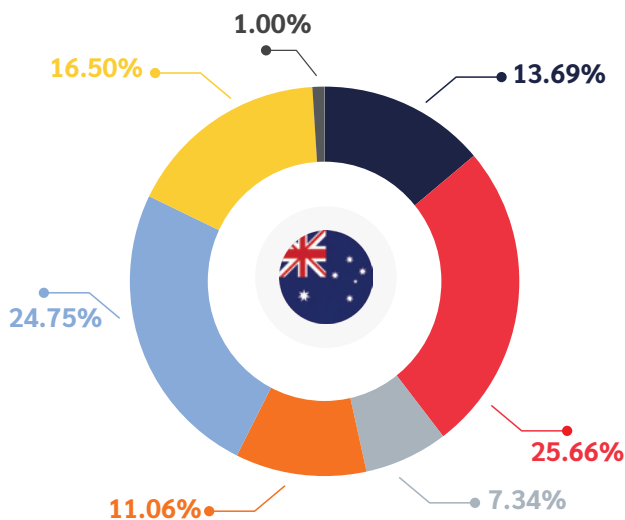
Sources of Inspiration

Which Of The Following Sources Do You Use For Research Or Inspiration When Booking Accommodation, Airline, Travel Activity Or Attraction That You Have Never Tried Before?



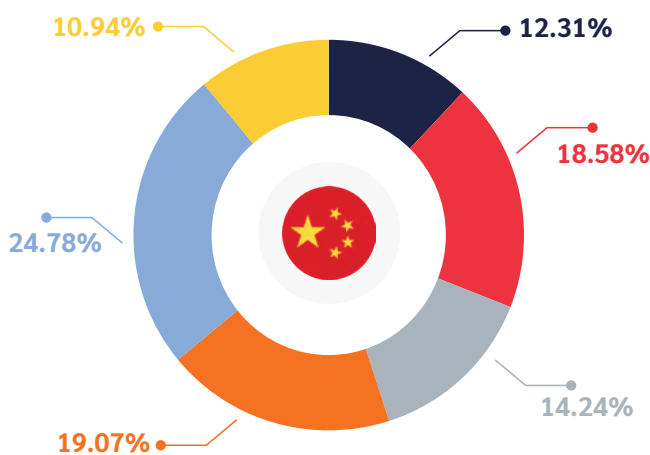
Singapore

- Cashback, loyalty, or coupon sites (e.g. ShopBack)
- Review and comparison sites (e.g. TripAdvisor)
- Social media influencers
- Travel lifestyle sites (e.g. Skift, Travel Weekly Asia)
- Online travel agents (e.g. Booking.com, Agoda)
- Word of mouth recommendations
- Other (Price/Travel Bloggers)



Australia

- Cashback, loyalty, or coupon sites (e.g. ShopBack)
- Review and comparison sites (e.g. TripAdvisor)
- Social media influencers
- Travel lifestyle sites (e.g. Skift, Travel Weekly Asia, Australian Traveler)
- Online travel agents (e.g. Booking.com, Agoda)
- Word of mouth recommendations
- Other (Friend suggestions, Google, Airline Websites, Travel Agent Recommendation, YouTube)



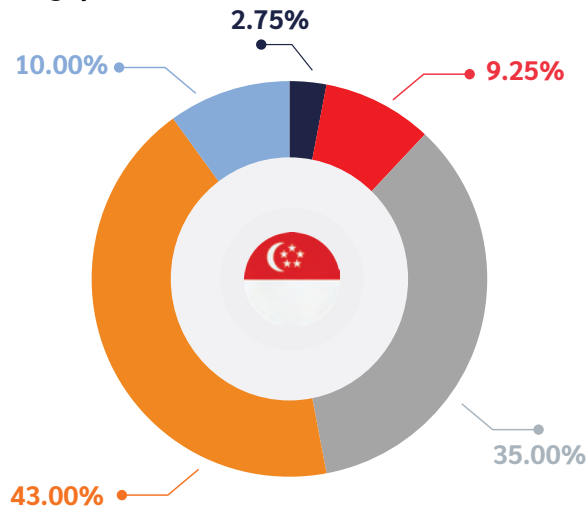
China

- Cashback, loyalty, or coupon sites (e.g. Fanli)
- Review and comparison sites (e.g. TripAdvisor)
- Social media influencers
- Travel lifestyle sites (e.g. Skift, Travel Weekly Asia, travelarchive.cn)
- Online travel agents (e.g. Booking.com, Agoda, Trip, Qunar)
- Word of mouth recommendations

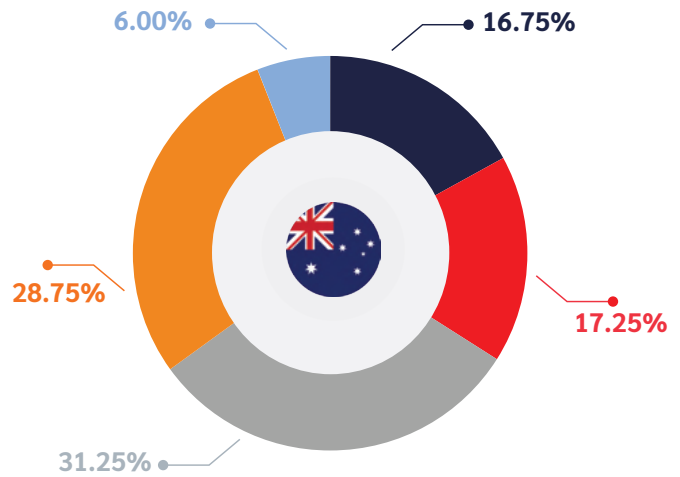
The Rise of Social Media Influencers

How Likely Are You To Try A New Airline, Hotel Or Travel Activity Based On An Influencer's Recommendation?

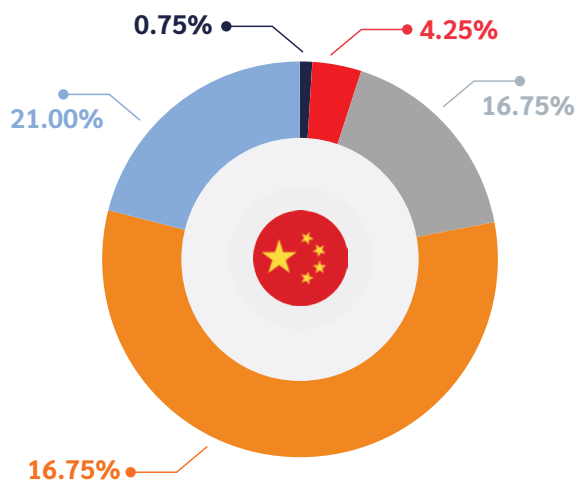
Singapore



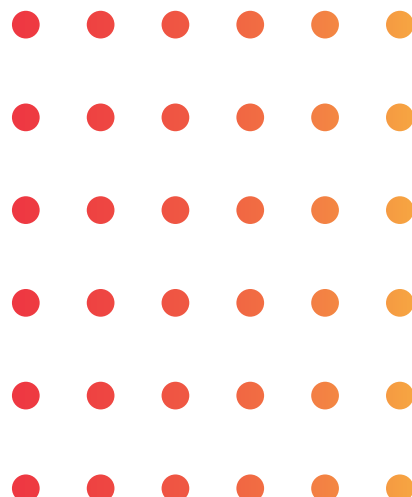
Australia

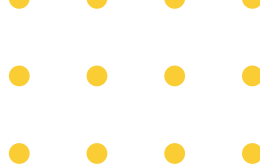


China



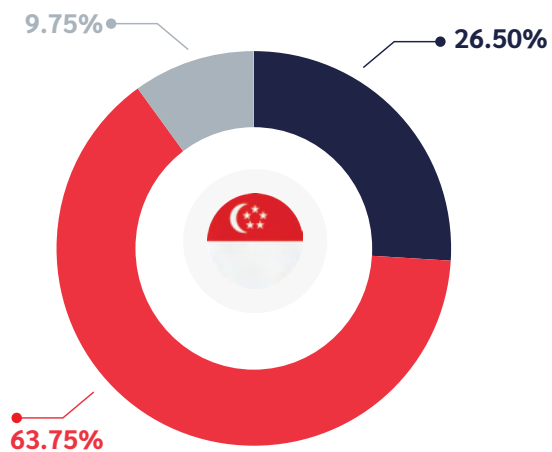
- Very unlikely
- Unlikely
- Neutral
- Likely
- Very likely



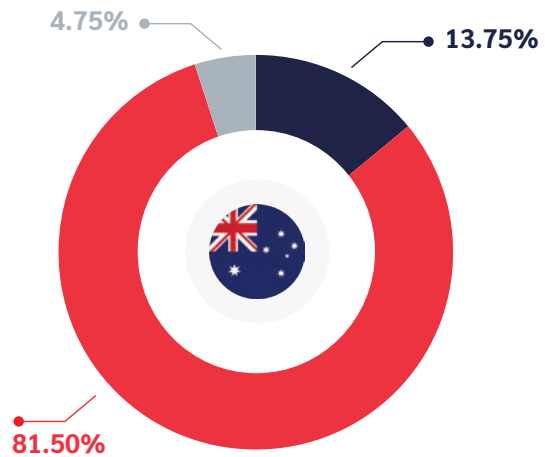


Have You Purchased A Flight, Accommodation, Or Travel Activity Based On An Influencer's Recommendation In The Past 12 Months?

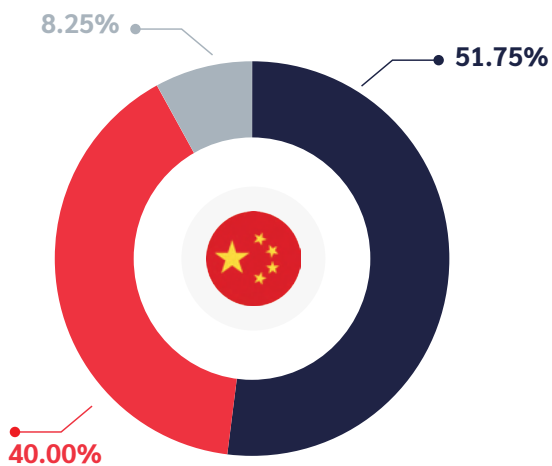
Singapore



Australia



China



- Yes
- No
- I can't remember

Where Consumers Place Their Trust

Singapore

On A Scale of 1-5, How Much Trust Do You Place In The Following Methods Of Discovery When Making A Travel-Related Purchase Decision?

1 = Do not trust at all, 5 = Trust completely

	1	2	3	4	5
Travel media site	7 1.75%	18 4.50%	185 46.25%	170 42.50%	20 5.00%
Printed advertisement	14 3.50%	55 13.75%	204 51.00%	114 28.50%	13 3.25%
Celebrity endorsement	31 7.75%	93 23.25%	177 44.25%	86 21.50%	13 3.25%
Outdoor, cinema or TV advertisement	9 2.25%	50 12.50%	201 50.25%	120 30.00%	20 5.00%
Cashback site / Loyalty program / Rewards	7 1.75%	29 7.25%	184 46.00%	148 37.00%	32 8.00%
Comparison / Review site / Buyers guide	3 0.75%	12 3.00%	114 28.50%	215 53.75%	56 14.00%
Social media - paid advertising	29 7.25%	76 19.00%	191 47.75%	95 23.75%	9 2.25%
Social media - influencer post	36 9.00%	74 18.50%	170 42.50%	100 25.00%	20 5.00%
Social media - organic post	16 4.00%	47 11.75%	194 48.50%	117 29.25%	26 6.50%
Online banner/video ads	15 3.75%	68 17.00%	210 52.50%	93 23.25%	14 3.50%
Organic search	7 1.75%	36 9.00%	178 44.50%	150 37.50%	29 7.25%
Paid search	32 8.00%	71 17.75%	196 49.00%	82 20.50%	19 4.75%
Word of mouth	3 0.75%	26 6.50%	121 30.25%	195 48.75%	55 13.75%

Australia

On A Scale of 1-5, How Much Trust Do You Place In The Following Methods Of Discovery When Making A Travel-Related Purchase Decision?

1 = Do not trust at all, 5 = Trust completely

	1	2	3	4	5
Travel media site	10 2.50%	32 8.00%	185 46.25%	156 39.00%	17 4.25%
Printed advertisement	7 1.75%	58 14.50%	190 47.50%	122 30.50%	23 5.75%
Celebrity endorsement	126 31.50%	116 29.00%	113 28.25%	35 8.75%	10 2.50%
Outdoor, cinema or TV advertisement	15 3.75%	76 19.00%	203 50.75%	95 23.75%	11 2.75%
Cashback site / Loyalty program / Rewards	12 3.00%	66 16.50%	180 45.00%	114 28.50%	28 7.00%
Comparison / Review site / Buyers guide	6 1.50%	25 6.25%	133 33.25%	192 48.00%	44 11.00%
Social media - paid advertising	101 25.25%	98 24.50%	137 34.25%	53 13.25%	11 2.75%
Social media - influencer post	149 37.25%	86 21.50%	105 26.25%	45 11.25%	15 3.75%
Social media - organic post	83 20.75%	81 20.25%	145 36.25%	72 18.00%	19 4.75%
Online banner/video ads	40 10.00%	98 24.50%	181 45.25%	72 18.00%	9 2.25%
Organic search	16 4.00%	38 9.50%	146 36.50%	158 39.50%	42 10.50%
Paid search	60 15.00%	99 24.75%	160 40.00%	64 16.00%	17 4.25%
Word of mouth	4 1.00%	18 4.50%	108 27.00%	196 49.00%	74 18.50%

China

On A Scale of 1-5, How Much Trust Do You Place In The Following Methods Of Discovery When Making A Travel-Related Purchase Decision?

1 = Do not trust at all, 5 = Trust completely

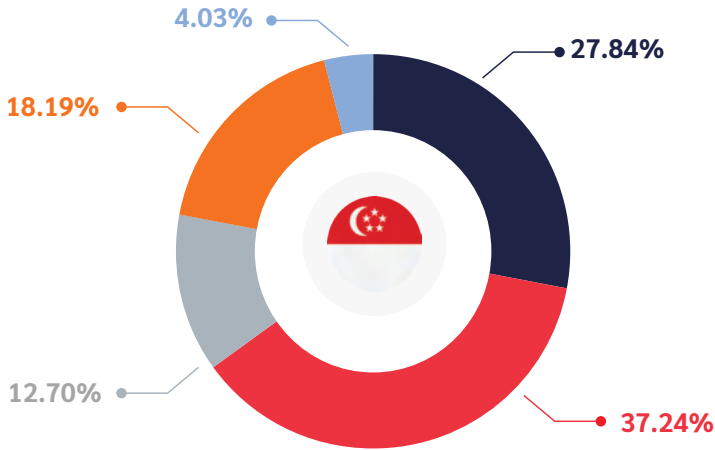
	1	2	3	4	5
Travel media site	2 0.50%	15 3.75%	98 24.50%	189 47.25%	96 24.00%
Printed advertisement	5 1.25%	47 11.75%	182 45.50%	115 28.75%	51 12.75%
Celebrity endorsement	30 7.50%	47 11.75%	110 27.50%	145 36.25%	68 17.00%
Outdoor, cinema or TV advertisement	6 1.50%	28 7.00%	141 35.25%	167 41.75%	58 14.50%
Cashback site / Loyalty program / Rewards	6 1.50%	30 7.50%	113 28.25%	160 40.00%	91 22.75%
Comparison / Review site / Buyers guide	1 0.25%	16 4.00%	69 17.25%	213 53.25%	101 25.25%
Social media - paid advertising	7 1.75%	35 8.75%	162 40.50%	131 32.75%	65 16.25%
Social media - influencer post	4 1.00%	31 7.75%	116 29.00%	188 47.00%	61 15.25%
Social media - organic post	2 0.50%	19 4.75%	90 22.50%	182 45.50%	107 26.75%
Online banner/video ads	7 1.75%	44 11.00%	140 35.00%	135 33.75%	74 18.50%
Organic search	1 0.25%	19 4.75%	145 36.25%	158 39.50%	77 19.25%
Paid search	6 1.50%	33 8.25%	124 31.00%	159 39.75%	78 19.50%
Word of mouth	0 0.00%	10 2.50%	90 22.50%	182 45.50%	118 29.50%

Profitable Channels for Optimised Bookings

Where Do You Usually Complete Your Bookings?

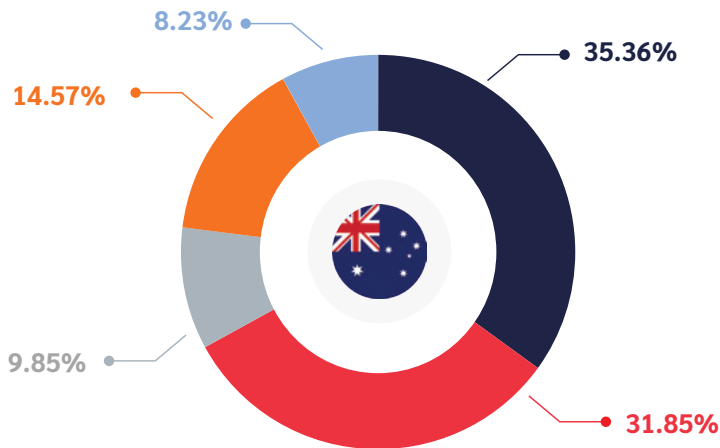
Singapore

- Directly on the brand.com website
- Through a third-party or referral platform (e.g. Booking.com, Expedia, Agoda, Klook, etc)
- Through a cashback or coupon site (e.g. Shopback)
- Via a mobile app (the brand or a third-party)
- Over the phone or in person



Australia

- Directly on the brand.com website
- Through a third-party or referral platform (e.g. Booking.com, Expedia, Agoda, Klook, etc.)
- Through a cashback or coupon site (e.g. Shopback)
- Via a mobile app (the brand or a third-party)
- Over the phone or in person



China

- Directly on the brand.com website
- Through a third-party or referral platform (e.g. Booking.com, Expedia, Agoda, Klook, etc)
- Through a cashback or coupon site (e.g. Fanli)
- Via a mobile app (the brand or a third-party)
- Over the phone or in person

