



agoda



Tailored to Win:

How Hotels are using Localization
to Capture Asia's Tourism Boom



Content

Tailored to Win: How Hotels are using Localization to Capture Asia’s Tourism Boom

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Executive Summary

Asia has become the fastest-growing engine of global travel, emerging as both a leading destination and the world's largest source of overseas travelers. Its share of global international arrivals has surged from about 9% in 2022 to nearly 28% by early 2025, second only to Europe.¹ At the same time, overseas travel among Asians is expanding rapidly. The International Air Transport Association (IATA) projects that Asians will account for half of all global air passenger growth over the next 15 years, underscoring the region's central role in shaping global travel.² Demographics reinforce this trend: the Asia Pacific region's population is set to reach 4.3 billion by 2030, with two-thirds of the global middle class based in the region by 2034.³ Alongside rising incomes, new flight routes and government-backed tourism campaigns are propelling overseas and intra-regional travel.

As Asia accelerates its travel growth, the region's tourism landscape is being reshaped. Hotels' success in an increasingly lucrative but competitive environment will depend on their ability to capture regional foreign tourist arrivals. In this context, success will be determined by the ability of hoteliers to anticipate and respond to rapidly evolving traveler expectations. For hotels seeking to do so, the challenge is clear: to understand today's travelers, tailor their approach to key guests from source markets, and prioritize business growth as well as resilience in a dynamic market.

This report draws on a comprehensive survey of 526 hoteliers across Asia to identify the strategies adopted to cater to the diverse needs of travelers in Asia and the barriers they face in providing more "localized" marketing content, booking experiences, and on-site guest experiences.⁴ The key insights are →

¹ IATA (2024), "Global Outlook for Air Transport, June 2024".
Available at: <https://iata.org/en/iata-repository/publications/economic-reports/global-outlook-for-air-transport-june-2024-report/>

² IATA (2024), "Global Outlook for Air Transport, June 2024".
Available at: <https://iata.org/en/iata-repository/publications/economic-reports/global-outlook-for-air-transport-june-2024-report/>

³ eGlobal Travel Media (2025), "MarketHub Asia 2025: APAC Tourism Trends Unveiled".
Available at: <https://eglobaltravelmedia.com.au/2025/02/24/markethub-asia-2025-apac-tourism-trends-unveiled/>

⁴ This report draws on a series of in-depth interviews of hoteliers and a survey of 526 hoteliers across 12 Asian markets (i.e., Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines).

Key Localization Insights for Hotels

Insight 1:

Localization is the competitive edge in the intra-Asia travel boom

Hotels across Asia draw most of their overseas guests from neighboring or culturally connected markets, with China, Japan, and South Korea serving as the top source markets of overseas guests for each other. This regional bias highlights how intra-Asia tourism is both dominant and highly diverse, making localization a critical lever for competitiveness.

Insight 2:

Localization is not uniform, varying by source markets

Most hotels now tailor some aspects of the guest experience, such as language and payment options, but advanced localization like culturally specific dining options and staff training to meet the needs of diverse overseas guests remains inconsistent. As a result, many properties still localize only part of the guest journey, leaving a “last-mile” gap.

Insight 3:

Localization produces quantitative gains, with the greatest impact at more advanced stages

Even early stages of localization deliver benefits, but the biggest returns come when strategies are integrated across the guest journey. Hotels at advanced stages of localization report higher satisfaction, more repeat bookings, and greater willingness among guests to pay a premium. The localization dividend is clear, but not all properties are capturing it.

Insight 4:

The data gap: Barriers to adopting localization strategies

Hotels continue to face blind spots, particularly around guest preferences and cultural expectations as well as the impact of localization strategies. Limited data and uncertainty about return on investment leave many properties flying blind, resulting in missed opportunities to align with guest needs.

Insight 5:

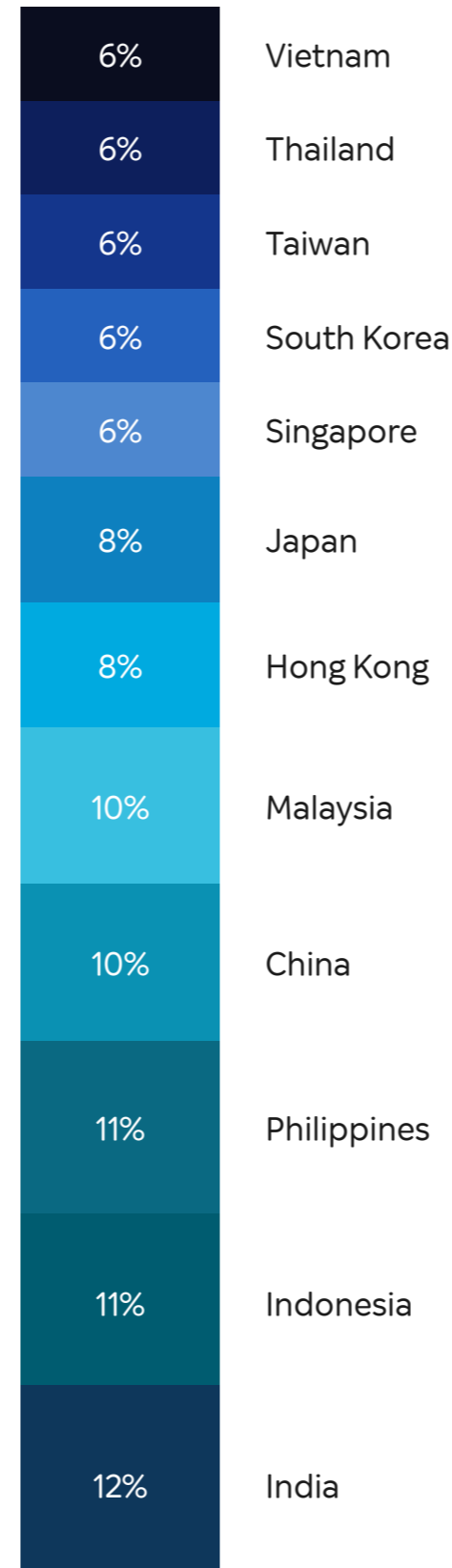
Leverage OTA partnerships to accelerate localization and market reach

OTA platforms are proving indispensable for hotels looking to close gaps in data, payments, and execution. By tapping into OTA tools and insights, properties can overcome resource constraints and scale localization more effectively, turning strategy into tangible improvements in guest experience and performance.

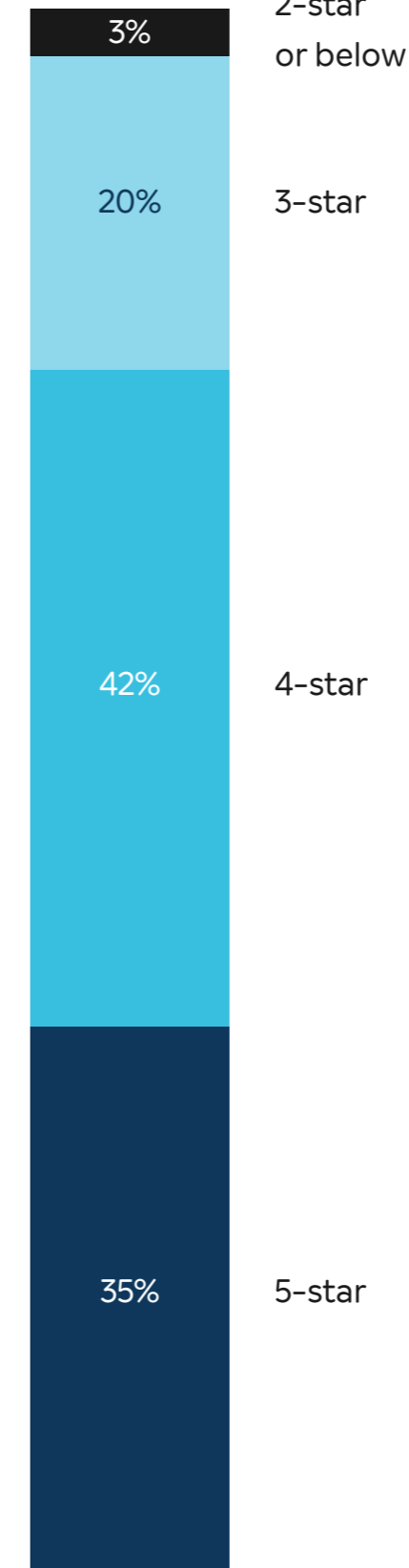


Respondent profiles

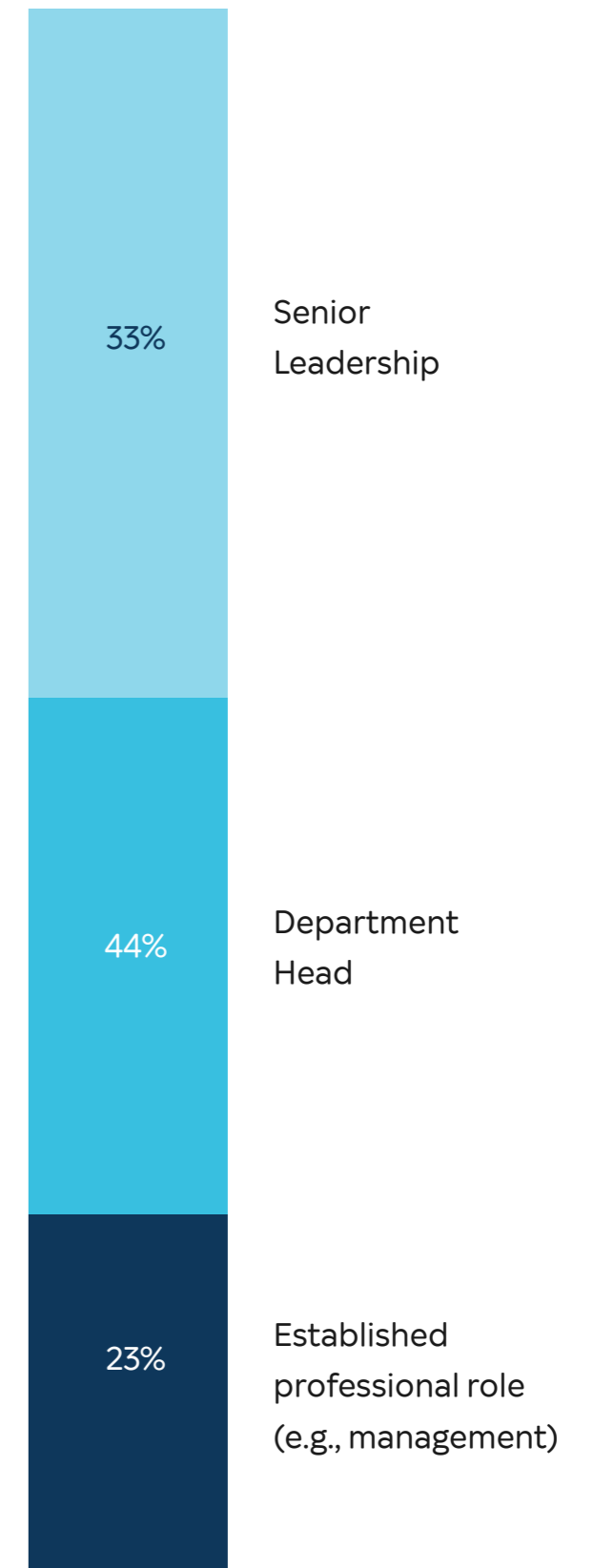
Number of Respondents (526)



Hotel Category



Role of respondent





Insight 1:

Localization is the competitive edge in the intra-Asia travel boom

- ▶ **Hotels across Asia show a strong regional bias, with most properties citing neighboring or culturally connected countries as their main source markets.**

China features among the top sources of overseas tourists for Singapore, Thailand, Vietnam, Hong Kong, and South Korea. In Northeast Asia, Japan and South Korea serve as major sources of foreign tourist arrivals for each other and for Taiwan (Exhibit 1). In Southeast Asia, proximity and strong cultural ties stand out: Singapore and Indonesia are amongst each other's top sources. India is more distinct, drawing from a mix of regional and long-haul markets among its key sources of overseas tourists.⁵












⁵ Sources include: ASEANstats (n.d.), "ASEAN visitor arrivals dashboard." Available at: <https://data.aseanstats.org/dashboard/tourism>; JNTO (n.d.), "Visitor Arrivals." Available at: <https://statistics.jnto.go.jp/en/graph/>; Ministry of Tourism (2024), "India Tourism Data Compendium." Available at: https://tourism.gov.in/sites/default/files/2025-03/India%20Tourism%20Data%20Compendium%202024_0.pdf; National Bureau of Statistics (2024), "Tourism". Available at: <https://data.stats.gov.cn/easyquery.htm?cn=C01>; HKTB (2025), "Visitor Arrival Statistics." Available at: https://partnernet.hktb.com/filemanager/LatestStatistics/721/Tourism_Statistics_12_2024.pdf; KTO (n.d.), "2024 International Visitor Survey." Available at: <https://know.tour.go.kr/ptourknow/tourgoInfoView19Re.do>; MOTC (2024), "Visitor Arrivals by Residence." Available at: <https://stat.taiwan.net.tw/statistics/year/inbound/residence>; Singapore Tourism Board (2025). Singapore Achieves Historical High in Tourism Receipts in 2024. Available at: <https://www.stb.gov.sg/about-stb/media-publications/media-centre/singapore-achieves-historical-high-in-tourism-receipts-in-2024/>

Exhibit 1

Intra-Asia travel dominates overseas tourism in the region

Top overseas source markets for hotels in each destination market surveyed

Based on official foreign tourist arrivals (FTA) statistics

Destination Market	Source Market		
	Rank 1	Rank 2	Rank 3
 China	South Korea	Japan	United States
 India	Bangladesh	United States	United Kingdom
 Singapore	Indonesia	China	India
 Indonesia	Malaysia	Australia	Singapore
 Japan	China	South Korea	Taiwan
 Thailand	Malaysia	China	South Korea
 Vietnam	South Korea	China	United States
 South Korea	China	Japan	Taiwan
 Taiwan	Japan	Hong Kong	South Korea
 Hong Kong	China	Taiwan	Philippines
 Malaysia	Singapore	Indonesia	Thailand
 Philippines	South Korea	United States	Japan

Source: Access Partnership analysis. Based on ASEAN (2023) and national statistics for Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines.

▶ **Intra-Asia travel dominates overseas tourism in the region – but the “Asian traveler” is not one archetype.**

China, Japan and South Korea were the top sources of overseas tourists amongst the hotels surveyed (Exhibit 2). While culturally connected, tourists from each of these countries have diverse preferences – from how they pick food options to how they make payments or prioritize experiences. As such, hotels that cater to these various groups of tourists effectively– or through **localization strategies**⁶ – will have a competitive edge in Asia.

What are Localization strategies?

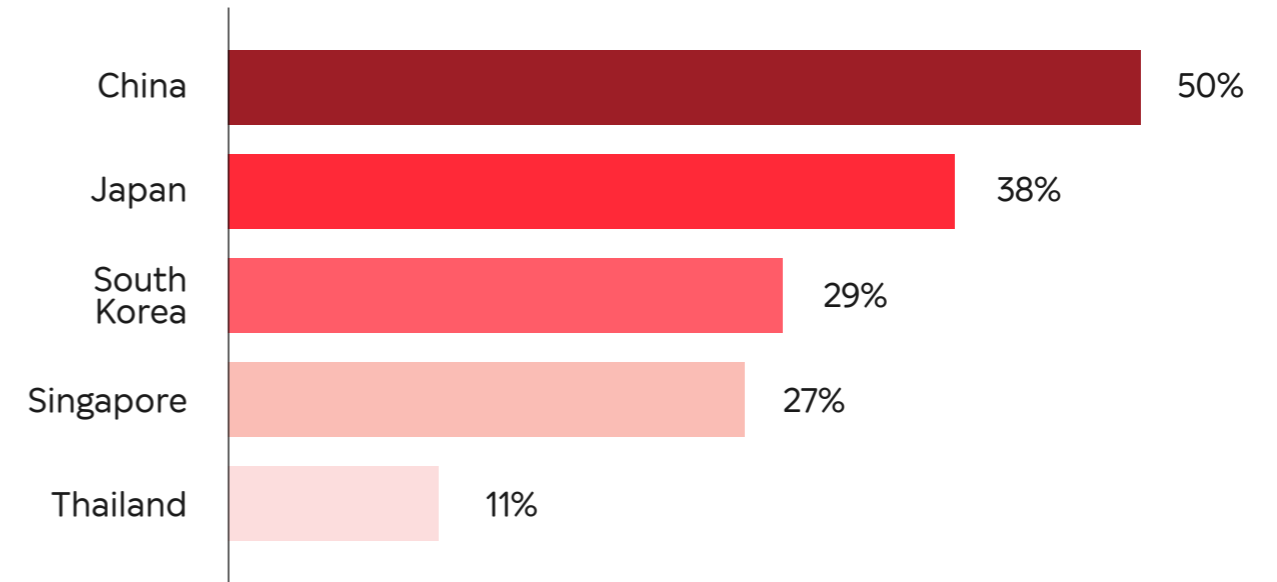
Strategies hotels use to deliver personalized experiences for guests from different countries or regions. This includes adapting their **marketing, booking processes, payment options, and guest services** to reflect the specific cultural, linguistic, and practical preferences of each market.

Exhibit 2

Asian travelers are key guest streams for hotels in the region

Top visitor markets amongst hotels surveyed

Percentage of respondents selecting each market among their top three sources of overseas guests , %



Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.

Differentiation through localization strategies is key to catering to the needs of Asian travelers. Expert interviews suggest that hotels are starting to consider these needs, for instance, through providing a range of food options at breakfast buffets. In Japan, for example, properties have adapted to the growing Chinese market by adding dim sum and congee to breakfast offerings, providing Chinese tea and in-room collateral in simplified Chinese, and hiring Chinese-speaking guest relations staff.

⁶ The list of localization strategies examined in this report were derived based on expert interviews and literature review.



Insight 2:

Localization is not uniform, varying by source markets

Stages of localization maturity

A review of industry reports and literature reveals that hotels typically adapt their services to overseas guests across three key verticals: Marketing and Outreach, Booking and Payments, and On-site Experience.

To assess the level of depth and breadth of how hotels carry out these tailor-made strategies, we developed a maturity classification that groups them into three stages, which include⁷:

Limited tailoring

The property offers a small set of targeted features for overseas guests, applied across one or more service areas such as marketing, booking, or on-site services. While these efforts make interactions more accessible and familiar, the overall experience remains largely generic and undifferentiated.

Meaningful engagement

Tailored content, tools, and services introduced across all guest touchpoints to reflect specific cultural preferences. The overall guest experience feels customized.

Integrated Tailoring

Integrated, high-touch localization embedded across the entire guest journey. Guests experience a fully localized, seamless journey that reflects deep cultural understanding.

- ▶ Around a third of hotels in Asia have reached the stage of “integrated tailoring,” where localization is embedded across marketing, booking, and on-site experiences (Exhibit 3).

These properties are able to offer guests a seamless journey that recreates the “home away from home” experience. For mid- to-high-range hotels, including five-star properties, such efforts are especially important to remain competitive, as these segments rely heavily on being able to scale personalized services for diverse overseas guests. While only 17% of three-star properties have reached the “integrated tailoring” stage, this is true for 45% of five-star properties, demonstrating the investment that higher-tier properties are willing to make into providing more customized experiences and catering to their top markets. Interestingly, conversations with industry players suggest that ultra-luxury properties tend to lean more on individualized, high-touch offerings such as butler services, bespoke dining, and personalized amenities, making origin-based localization less central to their value proposition. Nonetheless, for the majority of hotels, localization is a critical tool to differentiate themselves and meet the expectations of a diverse intra-Asia traveler base.

⁷ Properties are classified into three stages of localization based on the breadth and depth of their strategies. Limited tailoring refers to properties that have implemented at least one basic strategy in any part of the guest journey. Meaningful engagement captures properties that have adopted at least one intermediate strategy across marketing and outreach, booking and payments, and on-site experiences. Integrated tailoring represents the most advanced stage, where properties have implemented at least one advanced strategy in each of the three areas. Strategies adopted by hotels just for their top source market are used for this classification.

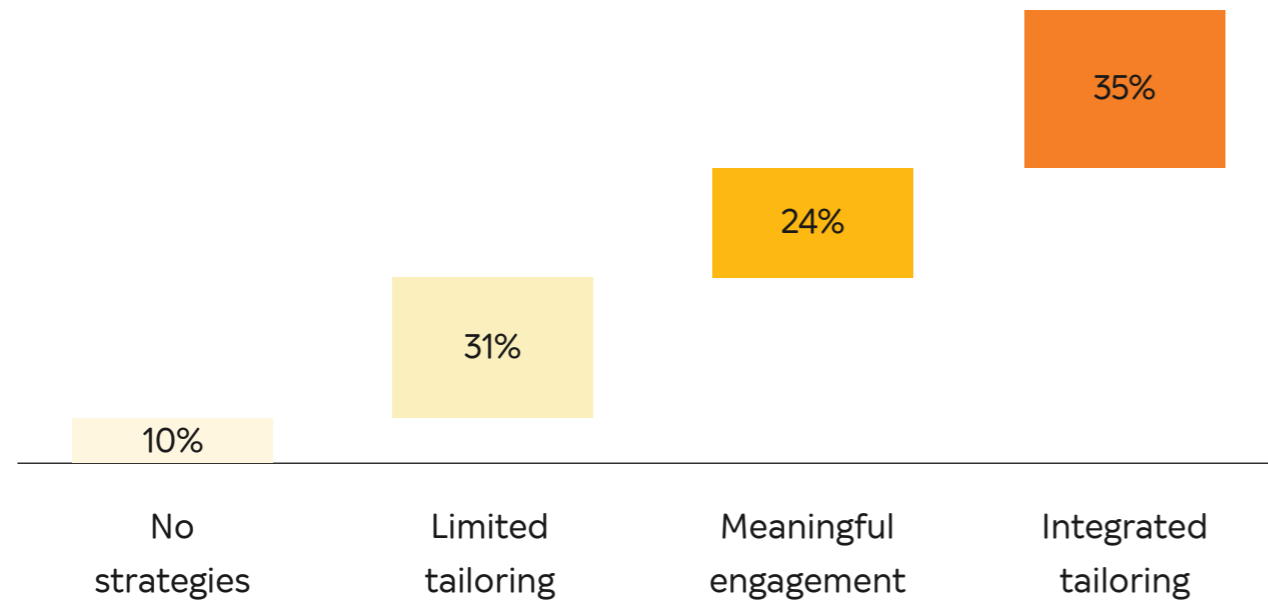


Exhibit 3

Over a third of hotels are offering a seamlessly localized journey

State of adoption of localization strategies

Percentage of respondents, %



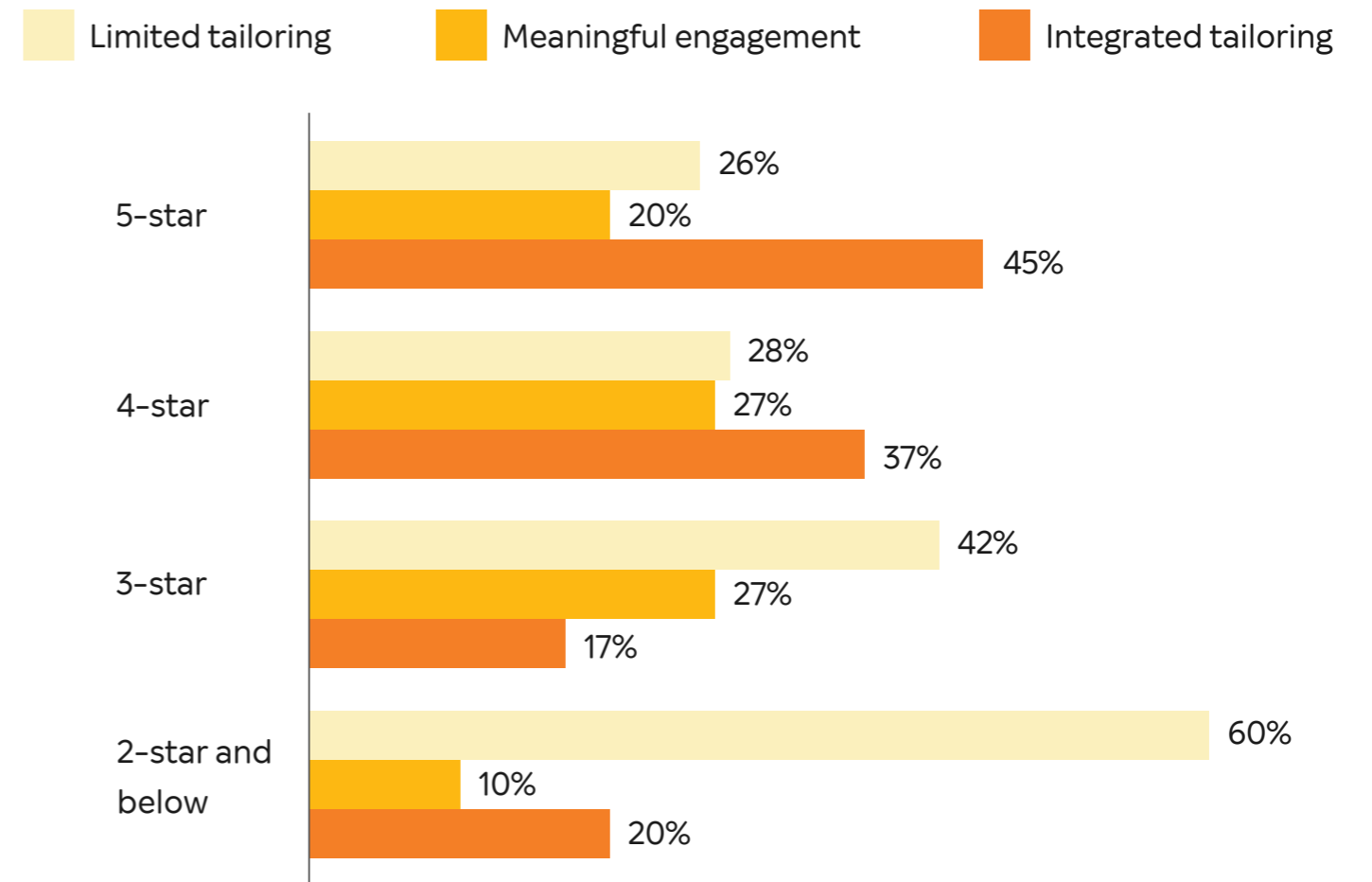
Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.

Exhibit 4

5-star hotels lead in adopting integrated tailoring strategies

State of adoption of localization strategies by star rating

Percentage of respondents, %



Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.

Marketing and outreach:

Hotels are engaging through local channels but less adept in tapping key opinion leaders

- ▶ Hotels are using culture-specific content and tailoring marketing materials to local trends, with more than half of hoteliers already relying on culturally relevant imagery.
- ▶ Despite the strong efforts to engage via local channels, hotels in Asia have been far slower to partner with local content creators who can shape consumer choices effectively.

Close to or around 60% of those who listed China, Singapore, Japan, and South Korea as top source markets said they used local media channels or popular platforms. In these markets, local channels have enormous reach. In China, WeChat has over a billion users (mostly based in China), Douyin 766 million, and Xiaohongshu over 300 million.⁸ Meanwhile in Singapore, Instagram and TikTok both engage over half the population.⁹ In South Korea, KakaoTalk reaches nearly the entire population (48 million monthly active users) alongside YouTube (43.6 million) and Instagram (24 million).¹⁰

This is likely due to the difficulty in identifying the right key opinion leaders to engage and represent their brands. Only 35% of those surveyed who named China as a top market are working with Chinese content creators or influencers, but travel recommendations on platforms such as Douyin or Xiaohongshu by popular creators can directly influence booking decisions, especially among younger travelers.¹¹ The top videos by popular influencers on Xiaohongshu routinely attract millions of views on average.¹² Given this outsized influence, those who can successfully identify suitable influencers and work with them to deliver authentic messages can more effectively stand out in crowded, highly localized markets.

⁸ Sources include: Business of Apps (2025), "WeChat Revenue and Usage Statistics (2025)." Available at: <https://www.businessofapps.com/data/wechat-statistics/>; Business of Apps (2025), "TikTok Revenue and Usage Statistics (2025)." Available at: <https://www.businessofapps.com/data/tik-tok-statistics/>; Nikkei Asia (2024), "Xiaohongshu: Can China's wildly popular app raise its profit game?" Available at: <https://asia.nikkei.com/business/business-spotlight/xiaohongshu-can-china-s-wildly-popular-app-raise-its-profit-game>

⁹ DataReportal (2025), Digital 2025: Singapore. Available at: <https://datareportal.com/reports/digital-2025-singapore>

¹⁰ Sources include: Reuters (2024), "Who is Kim Beom-su, founder of South Korean tech giant Kakao?" Available at: <https://www.reuters.com/technology/who-is-kim-beom-su-founder-south-korean-tech-giant-kakao-2024-07-24/>; DataReportal (2025), Digital 2025: South Korea. Available at: <https://datareportal.com/reports/digital-2025-south-korea>

¹¹ Allua Tech (2024), "Top 10 Trending Xiaohongshu (RED/Note) Influencers You Should Know: Followers, Virality & Brand Power." Available at: <https://www.alluatech.com/post/top-10-trending-xiaohongshu-rednote-influencers-you-should-know-followers-virality-brand-power>

¹² Allua Tech (2024), "Top 10 Trending Xiaohongshu (RED/Note) Influencers You Should Know: Followers, Virality & Brand Power." Available at: <https://www.alluatech.com/post/top-10-trending-xiaohongshu-rednote-influencers-you-should-know-followers-virality-brand-power>

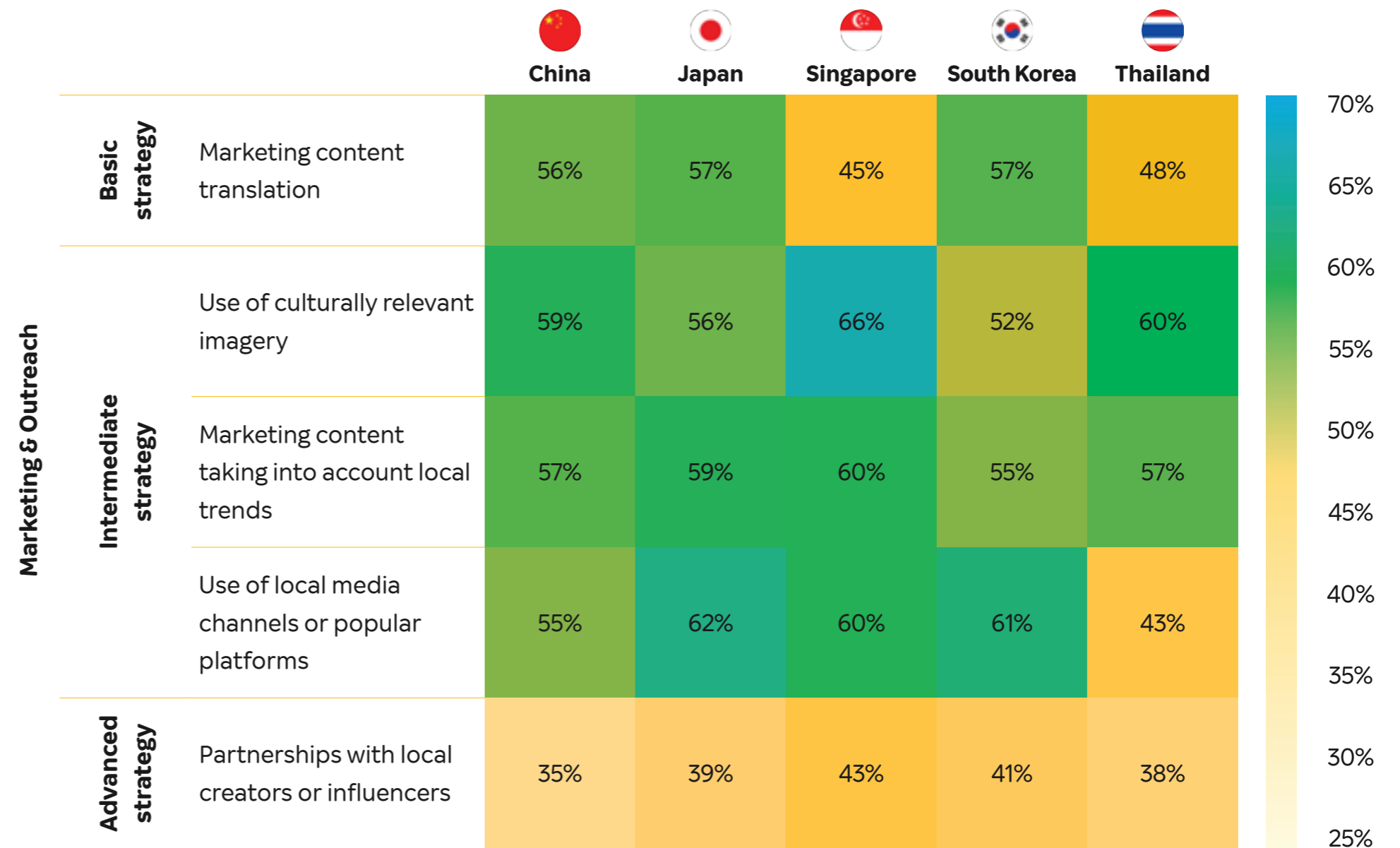


Exhibit 5

Hotels struggle with partnering with local content creators to target top source markets

Top localization strategy for each top visitor market (Marketing & Outreach)

Percentage of respondents that adopt the strategy for the reported source market, %



Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.

Booking and payments:

Hotels are going for easy wins

- ▶ **Booking and payments have become a decisive point in the guest journey, with most hotels now addressing core needs but unevenly across markets.**
- ▶ **Gaps remain when it comes to more advanced measures.**

Overall, around six in ten properties display booking details and prices in the guest's language and currency for their top markets, likely supported by online translation tools, and a similar share offer online payments in local currency (Exhibit 6). Customer support in the guest's language, including non-English languages, is also common, particularly for Japanese and South Korean travelers. These practices, aided by the increased sophistication of AI-based translation tools and chatbots, are helping reduce friction at the point of purchase and a "localized language" experience has become the new baseline for international guests.

In China, digital wallets like Alipay (with over 700 million monthly active users in the country) and WeChat Pay (over 900 million users) are near-universal for local and tourist transactions including bookings and in-hotel services.¹³ In Singapore and South Korea, local wallets including PayLah! and NaverPay respectively are also increasingly becoming preferred means of transacting.¹⁴ That said acceptance of local wallets is offered by just over half of hotels targeting these markets and falls to only 35% for Thai guests. Cash acceptance in foreign currencies is rarer still, with adoption below 40% across most markets, although this could become less of an issue as digital payments become more widely used across the region. Hotels that close these last mile gaps by integrating local wallets more consistently and extending multilingual support through to check-in (particularly with support from OTA partners) will be better positioned to capture demand and reduce booking drop off.



¹³ Sources include: Business of Apps (2025), "WeChat Revenue and Usage Statistics (2025)." Available at: <https://www.businessofapps.com/data/wechat-statistics/>; Statista (2025), "Number of monthly active users of Alipay in China from 3rd quarter 2020 to 2nd quarter 2023." Available at: <https://www.statista.com/statistics/1395691/china-alipay-monthly-active-users/>

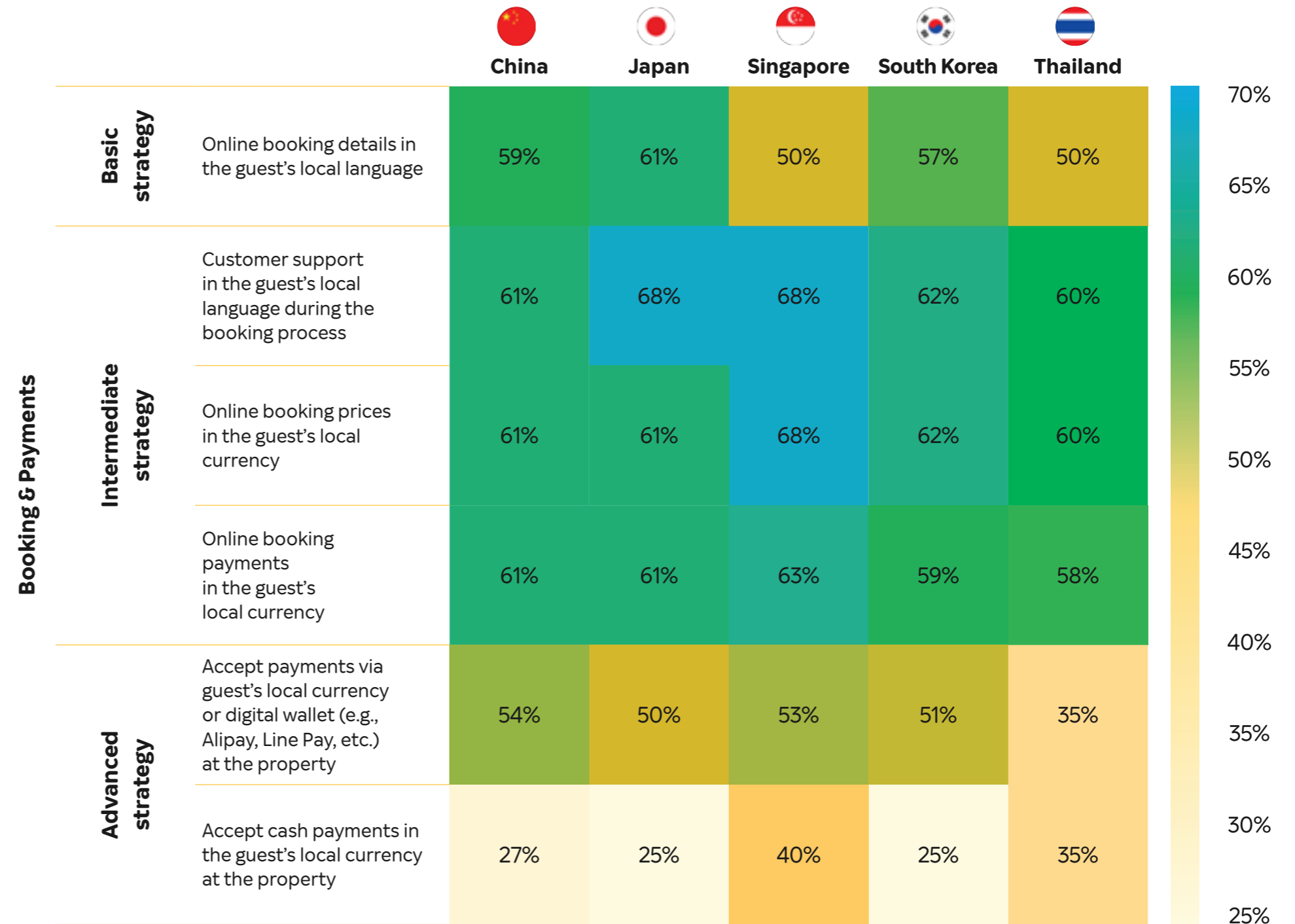
¹⁴ Sources include: DBS (2022), "DBS aims to more than double DBS PayLah! users to 3.5 million by 2023." Available at: https://www.dbs.com/newsroom/DBS_aims_to_more_than_double_DBSPayLah_users_to_3_5_million_by_2023; BusinessKorea (2024), "Pay Usage Rate Tops 60% in Korea." Available at: <https://www.businesskorea.co.kr/news/articleView.html?idxno=234094>

Exhibit 6

Hotels prioritize online Bookings & Payments localization, but onsite options lag

Top localization strategy for each top visitor market (Bookings & Payments)

Percentage of respondents that adopt the strategy for the reported source market, %



Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.

On-site experiences:

Hotels are extending localization efforts but advanced strategies remain rare

- ▶ **On-site experiences are the final frontier for differentiating localization efforts – tailored dining experiences are used to capture tastebuds.**

Tailored dining options are the most widely adopted localization measure, implemented by around half of properties targeting guests from Singapore, Japan, and China (Exhibit 7). This involves catering to preferences for specific types of cuisine such as Chinese and Japanese food, as well as religion or dietary-related needs such as vegetarian or halal dining options.¹⁵ Multilingual in-room materials are also relatively common, adopted by more than half of hotels serving tourists from pre-dominantly non-English speaking markets such as Japanese, South Korean, and Chinese guests. TV channels and entertainment catering to guests' preferences are provided by just over half of hotels who named Singaporean and Japanese guests as top visitor markets. Displaying popular local channels such as Channel News Asia (CNA) or Channel 8 for Singaporeans, or channels such as Nippon TV (NTV) and TBS for Japanese guests provide an added layer of comfort for guests away from home. These practices extend localization beyond booking which help create a sense of familiarity once guests arrive.

- ▶ **Hiring and training multilingual staff could bridge the last mile in providing a local touch.**

Overall, around four in ten properties say they have multilingual staff that can engage visitors from their top source markets but providing staff training on cultural norms and expectations is more rare. This may particularly impact Muslim travelers from markets such as Singapore and Thailand travelling during Eid holidays and adhering to specific fasting and halal dietary requirements. This reinforces a clear “last mile” gap in the localization journey: while hotels may reduce friction at the booking stage, weaker on-site adaptation risks leaving guest experiences generic. Properties that strengthen staff capabilities and invest in cultural amenities, supported by OTA insights, will be best placed to convert first-time stays into repeat business.



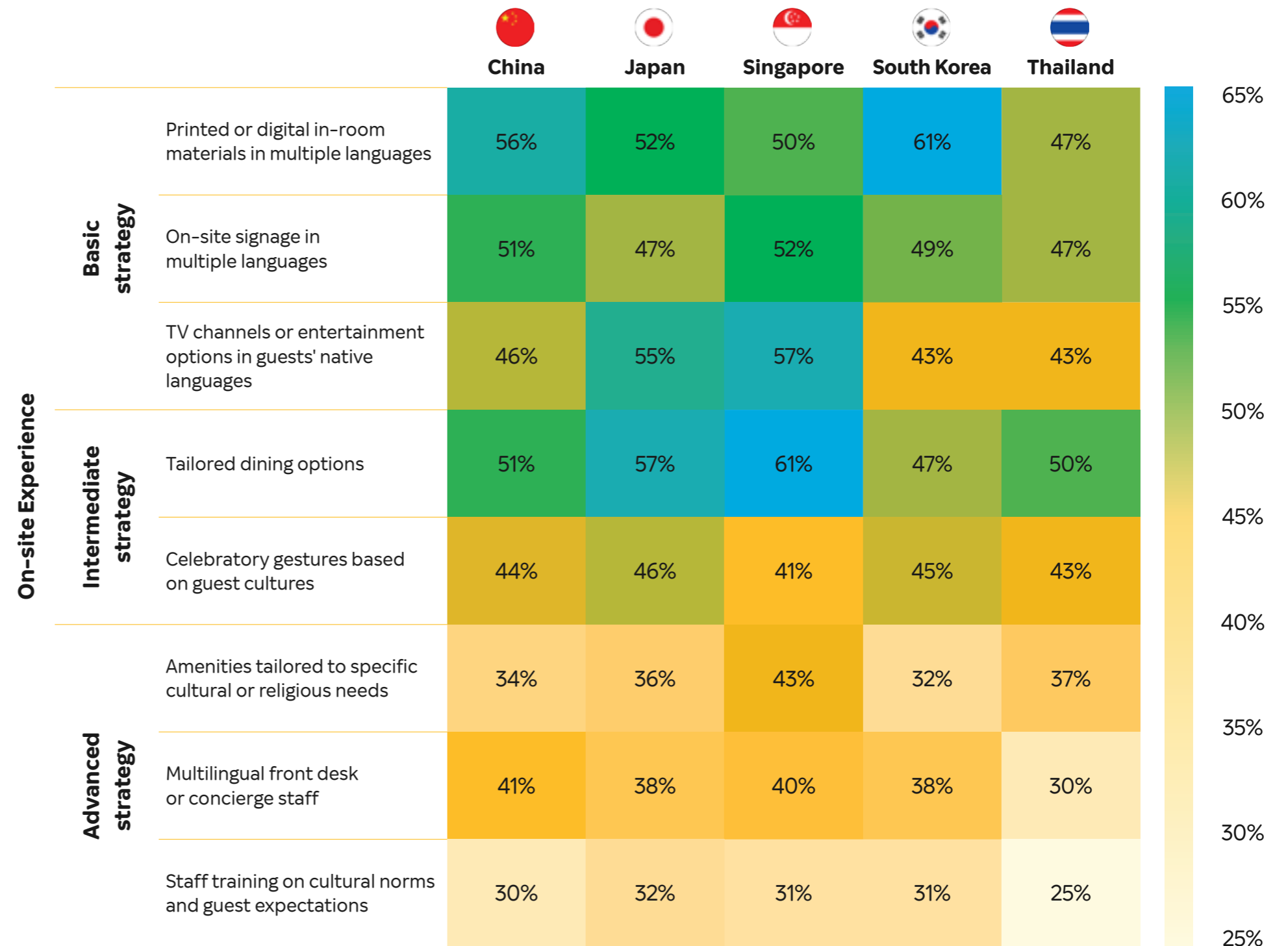
¹⁵ Sources include: Journal of Halal Industry and Services (2018), “Challenges and Prospects of the Halal Hotel Industry in Muslim-majority and Muslim-minority Countries: The Case of Malaysia and Thailand.” Available at: <https://ssrn.com/abstract=3595619>; YouGov (2023), “World Food Day: What are Singapore’s major dietary preferences – and most favourite cuisines?” Available at: <https://sg.yougov.com/consumer/articles/47585-world-food-day-singapore-major-dietary-preferences-most-favourite-cuisines-2023>

Exhibit 7

Hotels vary onsite localization strategies widely based on top source markets

Top localization strategy for each top visitor market (On-Site Experiences / Guest Services)

Percentage of respondents that adopt the strategy for the reported source market, %



Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.

Insight 3:

Localization produces quantitative gains, with the greatest impact at more advanced stages

▶ **Localization yields dividends: hotels that adopt advanced strategies are pulling ahead in financial performance.**

▶ **The impact on RevPAR is the result of a range of benefits that accumulate as hotels advance their localization efforts.**

The return on investment is highest when localization is approached holistically rather than piecemeal, underscoring the need for hotels to embed deeper, integrated strategies across the entire guest journey. Notably, while just 41% of hotels at the early stage (i.e., at the limited tailoring stage) reported a significant positive impact on RevPAR, 59% of those at the advanced stage (i.e., at the meaningful engagement and integrated tailoring stages) did so, underscoring that deeper integration drives both stronger financial performance and long-term competitiveness.

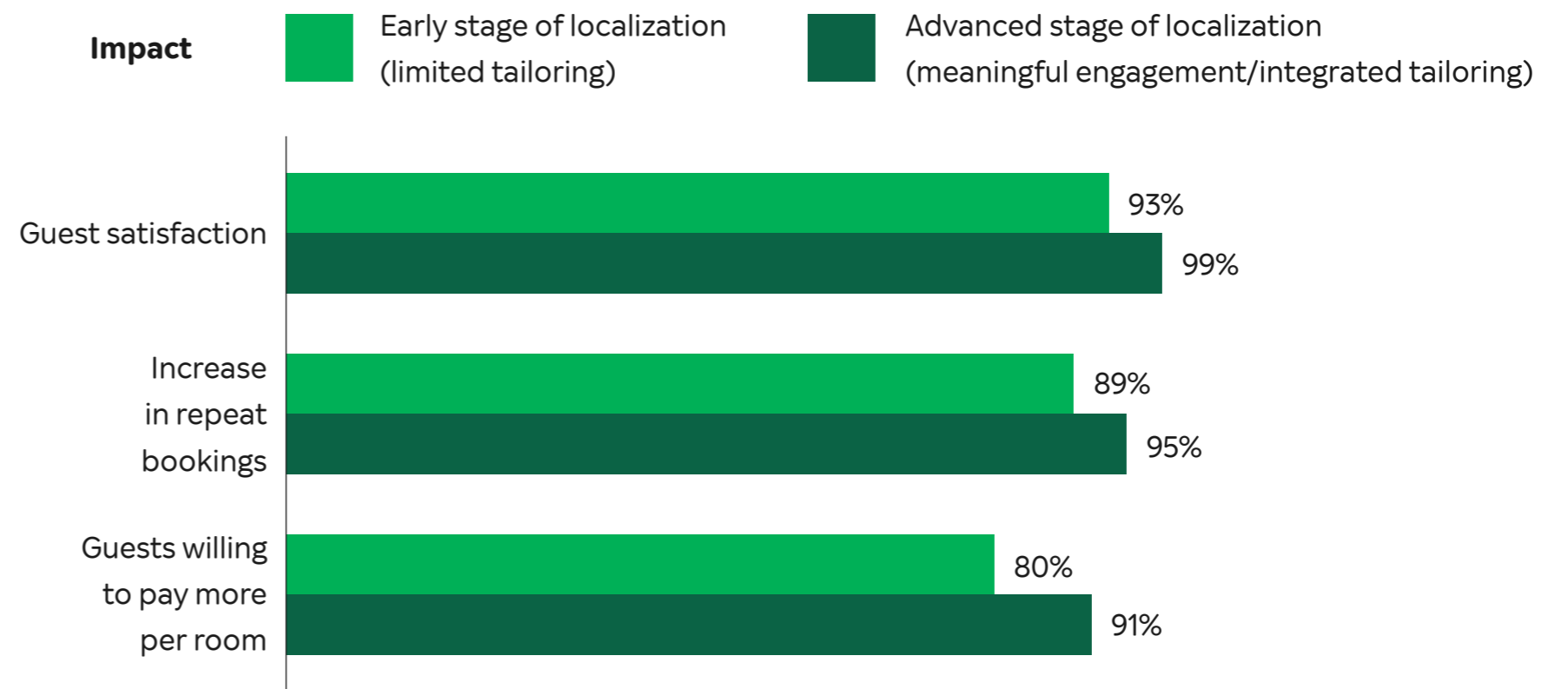
The benefits differ depending on the stage of adoption. At an early stage of localization (i.e., limited tailoring), most properties report strong outcomes, with 93% noting higher guest satisfaction and 89% seeing more repeat bookings for their top visitor market as an impact of localization. As hotels move to advanced stages (i.e., meaningful engagement and integrated tailoring), the benefits are amplified: 99% report improved guest satisfaction, 95% see an increase in repeat bookings, and 91% find that guests are willing to pay more per room compared with 80% at the early stage (Exhibit 8). These results illustrate that deeper localization not only enhances the guest experience but also unlocks greater pricing power and loyalty, reinforcing its role as a driver of long-term competitiveness.

Exhibit 8

Advanced localization unlocks greater guest satisfaction, loyalty, and revenue

Impact of localization strategy for top visitor market by stage of adoption

Percentage of respondents reporting each impact as a result of market-specific localization strategies, %



Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.



Insight 4:

The data gap: Barriers to adopting localization strategies

- ▶ A range of barriers from data blind-spots to technical gaps hinder hotels from adopting localization strategies.

Insight gaps are paramount, with many properties lacking the data on traveler profile and preferences needed to prioritize investments. Technical constraints such as the use of outdated booking engines with limited room for customization (faced by 36% of respondents) and the lack of access to tools for multilingual engagement (26% of respondents) add to the challenge. Addressing the following barriers will be key to enabling hotels to capture emerging regional demand effectively:



Data blind-spots that prevent hotels from making good decisions.

The leading barrier to developing localization strategies are awareness and data gaps (Exhibit 9). This includes limited awareness of guests’ cultural norms or expectations (55%), followed by a lack of guest data insights, such as the nationality mix and preferred services (46%). The latter is particularly acute for independent and budget hotels, and in markets with a large proportion of domestic travel such as Japan and Korea.¹ Without this clarity, many properties risk “flying blind,” over- or under-investing in localization for certain markets.

Return on investment (ROI) uncertainties create hesitation toward localization.

Uncertainty about the return on investment is a major barrier to localization, with 44% of hoteliers unsure which efforts deliver the greatest impact. This is more common among three-star and independent hotels, underscoring the need for stronger measurement and benchmarking. As such, many properties fall back on “checkbox” approaches such as simply translating websites, rather than implementing deeper, more effective strategies.

Tech knowledge and capability gaps that limit the extent to how hotels can adopt digital tools.

Outdated booking engines with limited customization options were cited by 36% of hotels as a constraint for more localization. In addition, 26% of respondents cited the lack of access to tools that support multilingual guest engagement as a barrier despite the increasing prevalence of such tools through AI-powered chatbots. In addressing these technology gaps, hotels might need to look beyond their current scope of expertise for external support – OTAs and external software providers would likely need to be part of the solution to support hotels in leveraging the benefits of digital tools more fully.

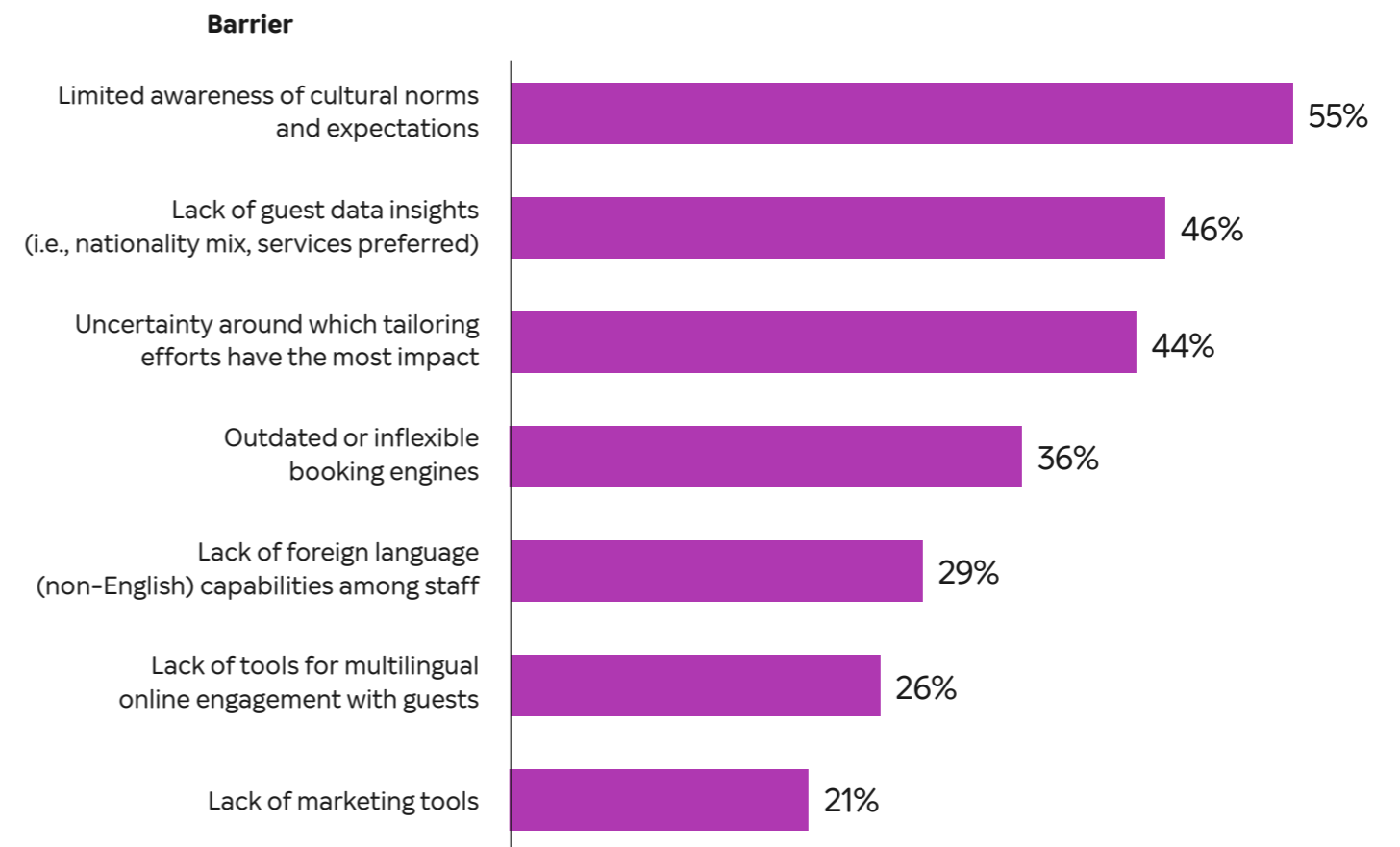
¹ Sources include: MLIT (2024), “Travel and tourism consumption trends.” Available at: <https://www.mlit.go.jp/kankocho/content/001864689.pdf>; World Tourism Council (2024), “South Korea’s Travel & Tourism Sector Set to Reach New Heights in 2024.” Available at: <https://wtcc.org/news/south-koreas-travel-and-tourism-sector-set-to-reach-new-heights-in-2024>

Exhibit 9

Limited cultural awareness and lack of guest insights are top localization barriers

Barriers faced by property operators in adopting localization strategy

Percentage of respondents reporting each barrier, %



Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.

Insight 5:

Leverage OTA partnerships to accelerate localization and market reach

- ▶ **OTA partnerships are proving critical for hotels aiming to advance their localization strategies.**

Properties that have successfully localized their offerings recognize the support that OTAs can provide. When it comes to localization strategy development, nearly eight in ten properties in an advanced stage of localization (i.e., those at meaningful engagement or integrated tailoring stages) rely on OTAs to share information on cultural norms and guest expectations, while 73% of such properties use them for guest data insights. OTAs also help hotels measure the impact of their tailoring efforts. The support provided by OTAs can ensure that localization dollars are being spent wisely – on the areas that truly matter – and place smaller, independent operators who otherwise lack the capability to collect such insights on the path to successful localization.

- ▶ **OTAs can support implementation through a wide range of digital tools.**

On the implementation front, 74% of advanced localizers rely on booking tools and interfaces provided by OTAs to display prices in guests' local currency and 71% use integrated payment functions that support different digital payment modes. OTA partners can reduce the need for hotels to look for separate, independent technology solutions and provide a one-stop solution to customizing the guest experience for different markets.

- ▶ **The opportunity now lies in moving beyond tactical fixes to deeper collaboration.**

By working closely with OTAs, hotels can gain a clearer picture of their guest mix and booking behaviours, use this knowledge to prioritize localization investments, and refine experiences that resonate across markets. Properties that combine OTA insights with their own capabilities are best placed to close the “insight gap,” reduce missed opportunities, and capture the full localization dividend.

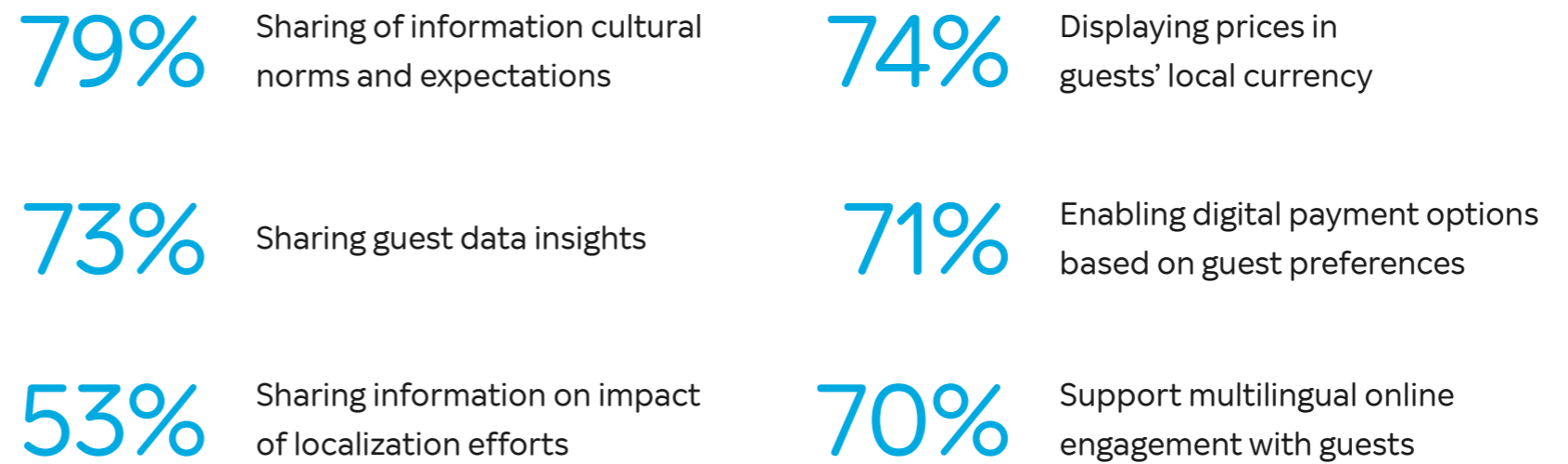
Exhibit 10

Hotels with advanced localization are leveraging OTAs to close insights gaps and accommodate guest preferences

OTA support to enable hotels at advanced stages of localization

Percentage of respondents, %

Usage of OTA support for localization strategy development and implementation



Source: Access Partnership survey of 526 hoteliers in Thailand, India, Singapore, Indonesia, Japan, Vietnam, South Korea, Taiwan, Hong Kong, China, Malaysia, and the Philippines in 2025.

Agoda's approach to localization

Leveraging Agoda's digital suite to localize

Agoda has evolved into one of Asia's leading travel platforms, with over 5 million accommodations displayed in more than 40 languages, multi-currency payment options, and 24/7 customer support. Its approach to localization is grounded in ensuring that hotels and travelers experience the platform as if it were a trusted local brand. This is achieved by:

Product and supply

Agoda provides a broad range of locally demanded offerings, with accommodations, activities, and flights curated to reflect market preferences. Its breadth and depth of supply help hotels appear familiar and relevant to guests in their origin markets.

Marketing and partnerships

Agoda runs culturally relevant campaigns, delivers market-specific promotions, and works with local partners to ensure that hotels are presented in ways that align with cultural norms and expectations.

Payments and pricing

Agoda supports a wide range of payment methods, from regional digital wallets to multi-currency support, alongside tools for dynamic and country-specific pricing. These ensure that international travelers can book and pay in ways that feel familiar and seamless.



Agoda's dedicated programs extend these core capabilities. The Agoda Growth Program helps hotels increase visibility in priority origin markets during peak travel periods (e.g., Lunar New Year in China, Golden Week in Japan). Country-Specific Promotions allow properties to design early-bird offers, seasonal packages, and long-stay discounts that resonate with distinct traveler segments. Agoda Media Solutions enables hotels to run native-language ad campaigns across the platform, while Guest Insight Sharing gives properties access to analytics on guest origins, preferences, and behaviors. Together, these offerings allow hotels to localize effectively, reach new segments, and maximize the returns from international demand.

For more information on how Agoda can help you capture the full potential of Asia's booming travel market:

- Visit partnerhub.agoda.com for more insights, resources, and best practices
- Existing partners: Log in to [YCS](#) to access tools and programs that can help your property stand out and succeed with today's Asian travelers.

Conclusion:

Tailoring strategies is
the next competitive edge

Localization is no longer a premium add-on — it is the baseline expectation of many overseas guests. The data shows that properties that have embraced tailored strategies enjoy stronger performance across RevPAR, guest satisfaction, and repeat bookings. Importantly, they also build more substantial brand equity by being seen as culturally fluent and digitally responsive.

Yet, for many hotels, the road to localization remains incomplete. Barriers such as hesitancy, limited means of adopting advanced digital systems, and lack of guest insights persist. OTA partners, such as Agoda, play a vital role in bridging these gaps.

Tailoring strategies must be approached holistically. Properties must view language, payment, design, and marketing as parts of an integrated guest journey – from the first touch to the final checkout. This requires not only tools but a shift in mindset: from standardization to segmentation, from mass communication to cultural resonance.

Recommendations for Hoteliers:

Audit your guest mix.

Use dashboards or OTA reports to identify your top inbound markets and track how they change over time.

Localize intentionally.

Map out the full guest journey for priority source markets and design experiences that reflect their language, payment preferences, and cultural touchpoints.

Invest in people and technology.

Train staff on cultural etiquette and service expectations, and deploy tools such as multilingual chat, local payments, and guest messaging to deliver seamless and culturally fluent service.

Leverage OTA partnerships.

Draw on their reach, guest insights, and promotional programs to accelerate your strategies and capture demand from new segments.

Measure what matters.

Track ROI across RevPAR, guest reviews, and repeat visits by segment, and use these insights to refine and strengthen localization efforts.

Asia's diverse and dynamic traveler base represents an enormous opportunity. By transitioning from reactive hospitality to proactive localization, properties can foster lasting loyalty, outperform their competitors, and establish themselves as champions of regional tourism growth.

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