

The *Loyalty Trends Report 2026* by Marriott Bonvoy makes one reality clear: loyalty in APEC is no longer a single, uniform behavior. While participation in loyalty programs is widespread across the region, the meaning, mechanics, and motivations of loyalty differ sharply by market. Understanding these differences is essential to sustaining relevance, protecting brand equity, and unlocking growth.

Our study into each APEC market reveals three distinct loyalty mindsets across the region – each requiring a different strategic approach.

Loyalty Strategists: Japan & South Korea

In Japan and South Korea, loyalty behaviors are highly deliberate, rational, and optimized. Travelers in these markets engage with loyalty programs as strategic tools—maximizing value through disciplined earning, frequent use of co-branded cards or stay-based accrual, and practical redemptions such as F&B or cost offsets.

For these travelers, loyalty is not about novelty or aspiration; it is about consistency, simplicity, and efficiency. Trust, clarity, and predictability matter more than gamification or experimentation.

Why this matters

In Loyalty Strategist markets, growth does not come from adding more features, but from refining what already works. Understanding this behavior allows hotel loyalty programs to optimize ecosystem breadth, reinforce everyday value, and protect loyalty equity in some of the region's most mature markets.

Value Optimizers: Singapore, Australia & Thailand

Value Optimizers sit at the pragmatic center of the loyalty spectrum. Travelers in Singapore, Australia, and Thailand are active but selective – engaging with loyalty when it clearly improves trip value, efficiency, or flexibility.

These travelers respond strongly to direct booking incentives, milestone bonuses, upgrades, and practical perks such as late checkout or room enhancements. They are driven more by whether loyalty tangibly improves the travel experience or delivers visible savings.

Why this matters

For Value Optimizer markets, loyalty success depends on making value obvious and immediate. Understanding these behaviors enables hotel loyalty programs to design loyalty that rewards the right actions—direct bookings, repeat stays, and on-property spend—while maintaining flexibility across different travel patterns, including “bleisure.”

Experience Seekers: India, Indonesia & Vietnam

Experience Seekers represent the region's strongest growth engine. Travelers in India, Indonesia, and Vietnam engage with loyalty emotionally as much as transactionally. They are more willing to trade cash for points, seek partnerships beyond hotels, and remain active in programs that offer access, exclusivity, and memorable experiences.

These markets also show rising affluence and aspiration. Loyalty is not just a savings mechanism – it is a gateway to status, discovery, and experiences that feel out of reach without membership.

Why this matters

In Experience Seeker markets, loyalty is a brand-building lever, not just a retention tool. Understanding these behaviors allows hotel loyalty programs to invest ahead of the curve – using experiences, partnerships, and personalization to lock in preference early as these markets scale.



The Strategic Imperative

Together, these groupings underscore a critical insight: Loyalty growth in APEC will not be driven by a single regional playbook.

Rather, deepening loyalty across APEC requires customized approaches based on market behavior and nuances towards hotel loyalty programs.

It requires precision in mature Loyalty Strategist markets to optimize the existing value proposition; clarity in pragmatic Value Maximizer markets to reward efficiency; and boldness in growing Experience Seeker markets, leading with aspirational experiences.

By deeply understanding market-specific loyalty behaviors, hotel loyalty programs can move beyond scale to sustained relevance—evolving from a one-size-fits-all program into a market-responsive loyalty ecosystem that grows with travelers, not just around them.

India

EXPERIENCE SEEKERS

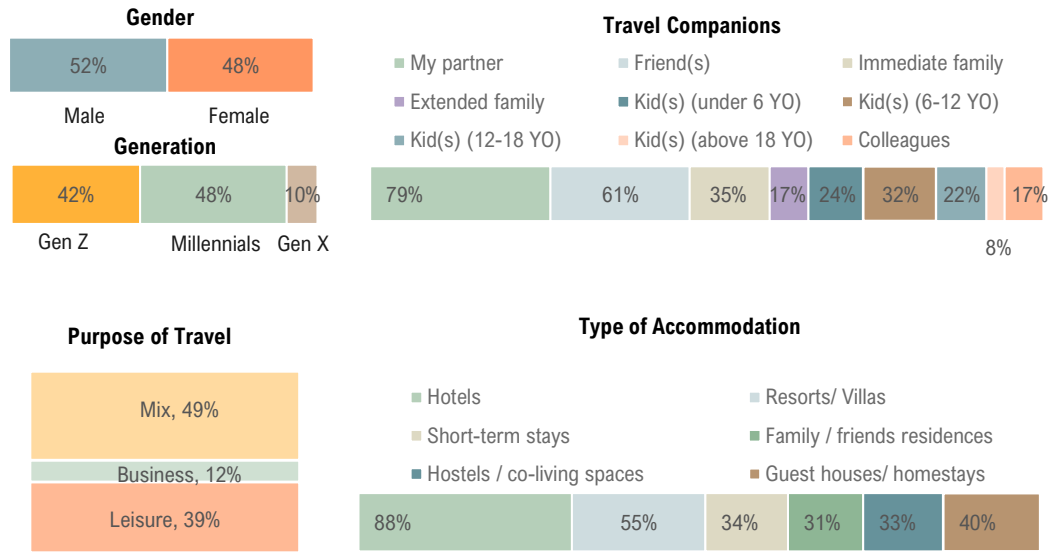
49% of travelers from India travel for a mix of leisure and business. Hotels are the most popular choice, followed by Resorts / Villas.

They typically travel with their partner or friends.

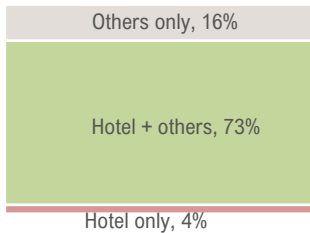
73% of travelers engage with multiple loyalty programs.

Travelers from India are more likely than APEC counterparts to earn hotel points through bank points transfer, signaling partnership potential.

Demographic & Travel Profile



Loyalty program engagement



How they engage with hotel loyalty programs



WHAT SETS TRAVELERS FROM INDIA APART

Their top 3 travel priorities and how they stack up against the region (% vs. APEC average)



#1 Nature / Sightseeing – 62%

These travelers are more likely to be:

- Millennials (53% vs. 48%)
- Traveling for both leisure and business (45% vs. 27%),
- Redeeming points frequently (57% vs. 51%)
- Trading cash for hotel points (48% vs. 29%)
- Using hotel loyalty points over cash for F&B experiences (65% vs. 57%)



#2 Food & Dining – 61%

These travelers are more likely to be:

- Evenly distributed across generations
- Male (59% vs. 54%)
- On leisure-only trips (89% vs. 67%)
- Earning hotel loyalty points through on-property dining and spa (52% vs. 38%)
- Using hotel loyalty points mainly to reduce travel expenses (68% vs. 52%)



#3 Shopping – 56%

These travelers are more likely to be:

- Middle-income (72% vs. 55%)
- On leisure-only trips (86% vs. 61%)
- Earning hotel loyalty points via co-brand credit card spending (60% vs. 55%)
- Using hotel loyalty points rather than cash for wellness packages (69% vs. 59%).