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BOOKING

The Infrastructure Challenges Facing
Business Travel in APAC

The Travel Commerce Accelerator

Introduction

Business travel across Asia-Pacific is entering a more demanding operating era. Buyers, TMCs, OTAs, regional platforms, and hotel companies are no longer focused only on whether rates and rooms can be sourced and booked.

The larger challenge is whether the operating infrastructure behind the booking can support accuracy, payment confidence, tax clarity, reconciliation, reporting, and future automation at scale.

Recent executive discussions across the APAC travel ecosystem surfaced a consistent pattern: the front end of business travel has improved meaningfully, while the back end remains fragmented.
Multi-source hotel content has expanded choice and price visibility.
Platform-led workflows have improved access and usability.
AI is beginning to influence search, service, and operational support.
But downstream data flows often remain inconsistent, manual, and difficult to reconcile.

This paper reframes that challenge through a broader industry lens. It does not attribute comments to individual companies or participants. Instead, it identifies the industry shifts that appear most important for APAC business travel as the ecosystem moves beyond booking and toward a more connected operating model.

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Section 01

Four Industry Shifts That Matter Now

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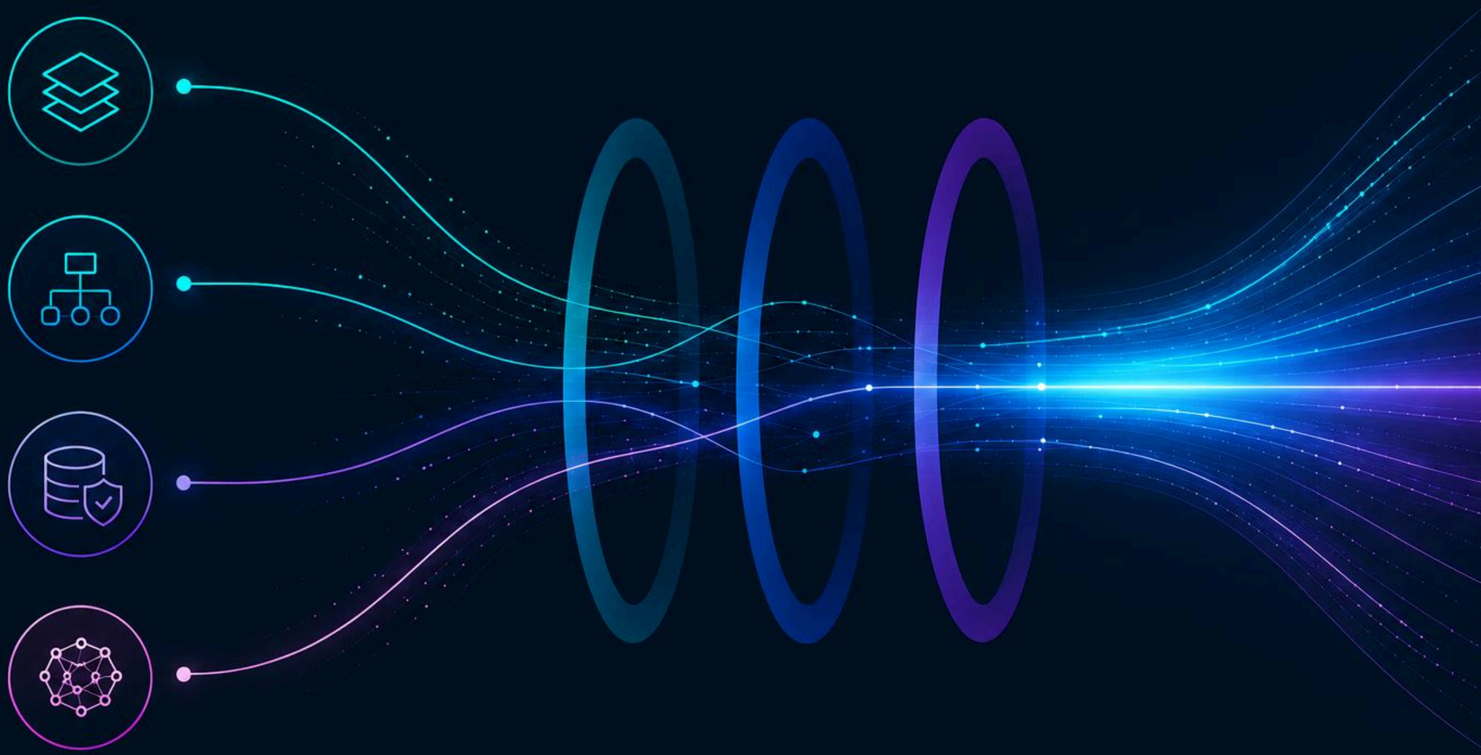
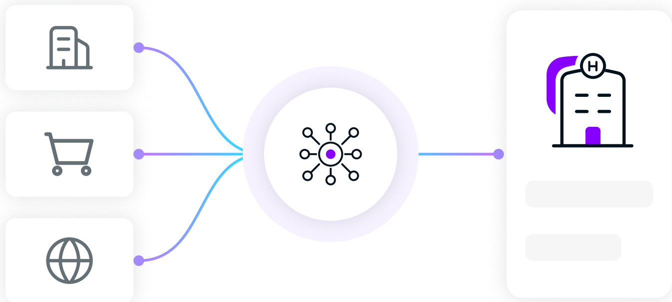


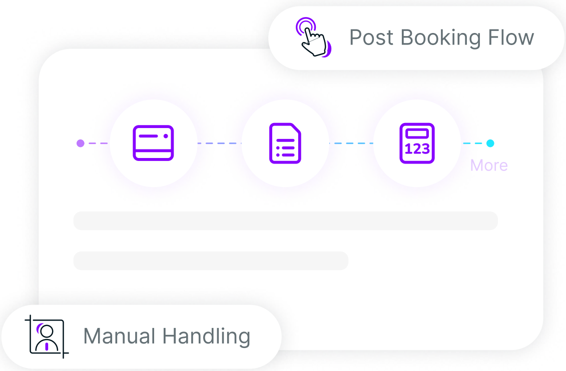
1. Multi-source hotel content is the new reality, but control has not caught up.

Across APAC, hotel sourcing increasingly draws from GDS, OTAs, direct APIs, bed banks, regional platforms, and direct hotel connections. This creates breadth and price visibility, but it also introduces operational complexity. The same property may appear differently across sources. Room types may not map cleanly. Rate rules, inclusions, cancellation terms, taxes, and payment expectations may vary depending on the path used to source the content.

The industry has largely accepted multi-source content as a practical necessity. The next challenge is control: ensuring that content is normalized, comparable, compliant, and serviceable after the booking is made.



2. The most painful friction is increasingly post-booking.



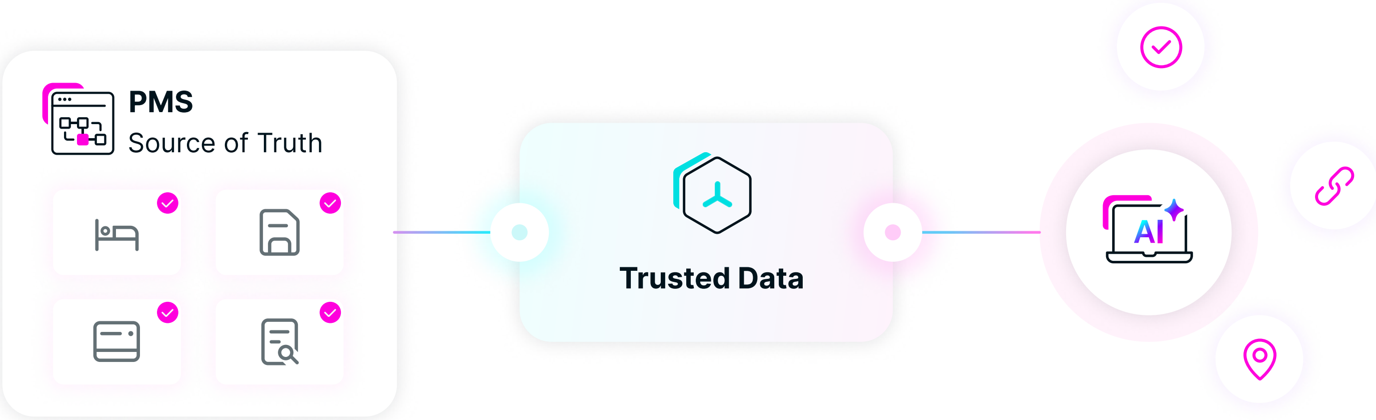
Shopping and booking flows have improved faster than downstream operations. The difficult work often begins after the reservation is made: confirming what was stayed, what was charged, what tax applied, which payment method was used, whether commission is owed, and how the final invoice should be reconciled.

These issues are not minor administrative burdens. They affect traveler service, corporate reporting, hotel profitability, partner trust, and the ability to scale automation. When booking, payment, folio, tax, and reporting data do not align, the ecosystem absorbs the cost through manual work, exceptions, escalations, and delayed visibility.

3. PMS-level truth is becoming strategically important.

The hotel PMS is where the actual stay outcome is ultimately recorded. It is where booking intent becomes operational reality: stay dates, room consumed, final charges, tax, payment, folio, and status. Without stronger access to that source of truth, travel platforms and corporate programs may know what was booked, but not always what actually happened.

That gap matters. Business travel cannot become truly automated if the industry cannot reliably connect shopping and booking data with final stay and settlement data. PMS-level connectivity is therefore becoming more than a technical integration. It is a strategic requirement for reconciliation, compliance, reporting, and trust.



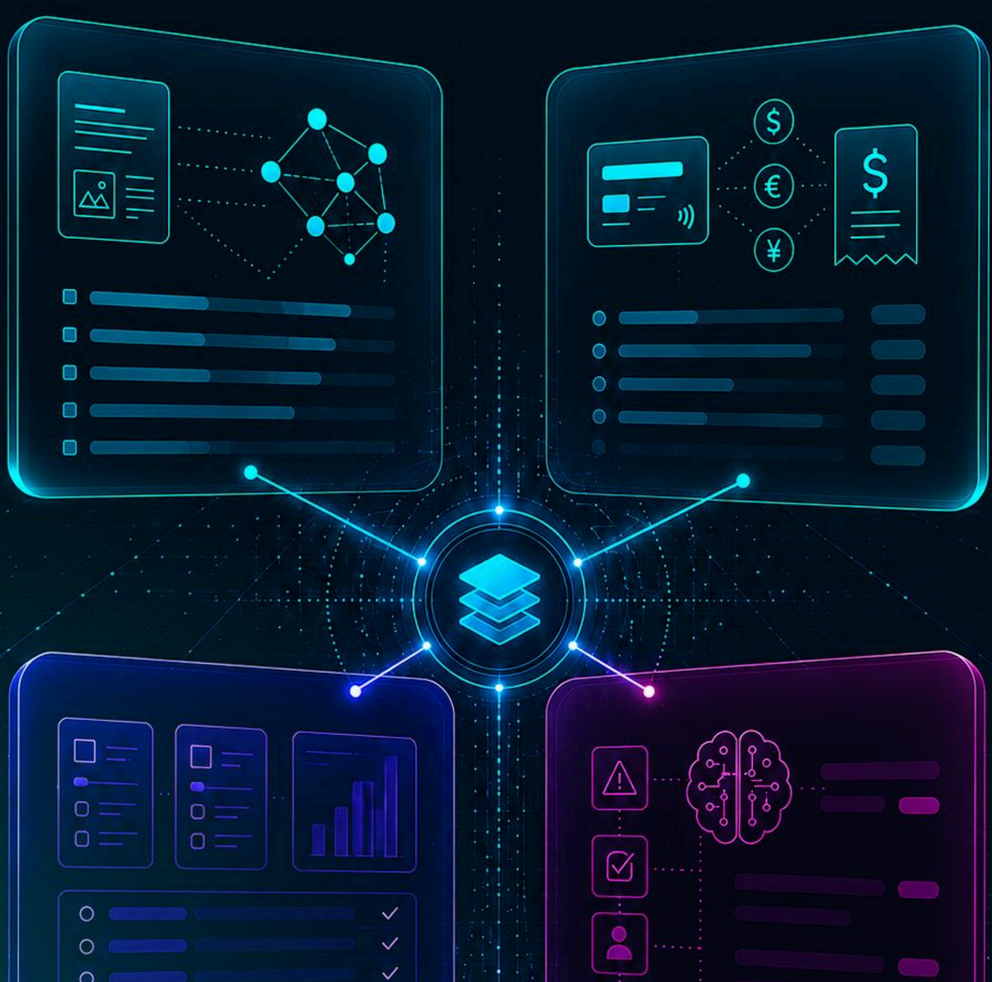
4. AI will not fix business travel complexity without trusted data.

AI has clear potential in re-shopping, itinerary support, content normalization, exception detection, invoice validation, compliance review, and service workflows. But AI can only operate well when the underlying data is structured, current, and consistent.

In APAC, where language, tax, payment, platform, and market requirements vary significantly, AI will be most useful when it is applied to disciplined operational problems. The near-term opportunity is not generic automation. It is workflow intelligence: reducing manual work, identifying exceptions earlier, validating data, and improving confidence across the travel lifecycle.

Section 02

The New Operating Requirement



The industry is moving toward a different definition of business travel infrastructure. The old model treated connectivity as the mechanism for delivering availability, rates, and booking capability.

The emerging model requires connectivity to support the full operating lifecycle.

That lifecycle includes source, shop, book, pay, stay, reconcile, report, and optimize. Each stage depends on the quality of the data that flows from the prior stage. When one part of the chain is inconsistent, the downstream burden multiplies.

Challenge

Content and Mapping Accuracy

Property identity, room types, inclusions, language, cancellation rules, and tax display must be reliable enough for both traveler choice and operational servicing.

Payment and Tax Clarity

Cross-border travel requires better visibility into currency, GST/VAT, local taxes, corporate billing rules, virtual payment methods, and final settlement.

Reconciliation and Reporting

Booking records, payment records, folios, invoices, commissions, and corporate reporting must align more consistently to reduce manual correction.

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Section 03

Why APAC Requires a Regionalized Approach

China, Southeast Asia, Japan, Korea, India, Australia, and outbound global travel corridors each bring different content, tax, payment, compliance, language, and service expectations. These differences are not edge cases. They are core adoption requirements.

APAC business travel cannot be addressed through a single global template.

China-to-global travel is especially important. As Chinese enterprises expand internationally, they need access to global hotel supply, but they also require solutions that respect Chinese platform behavior, payment expectations, tax requirements, servicing expectations, and language needs. Global infrastructure matters, but regional configuration determines whether the solution is trusted and used.

The opportunity is therefore both technical and commercial: normalize the infrastructure while localizing the application. The providers that can do both will be best positioned to help APAC business travel scale more efficiently.

Section 04

The Commercial Implication for Hotels, Platforms, and Buyers

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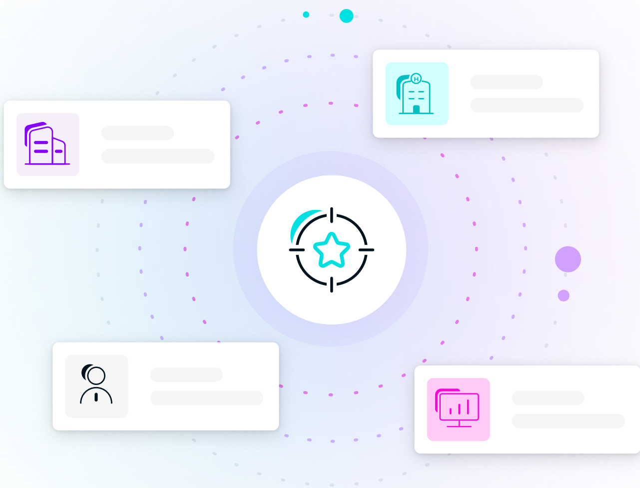
The infrastructure challenge affects every stakeholder in the business travel chain, but in different ways.

For Hotel Companies

The issue is not only whether they can access demand. It is whether they can participate profitably, represent their content accurately, support loyalty and merchandising priorities, and reduce downstream operational friction.



For TMCs, OTAs, and Regional Platforms

The issue is whether multi-source hotel content can be serviced efficiently and reconciled reliably after the booking is made. Operational burden grows quickly when content, payment, tax, and invoice data do not align.

For Corporate Buyers

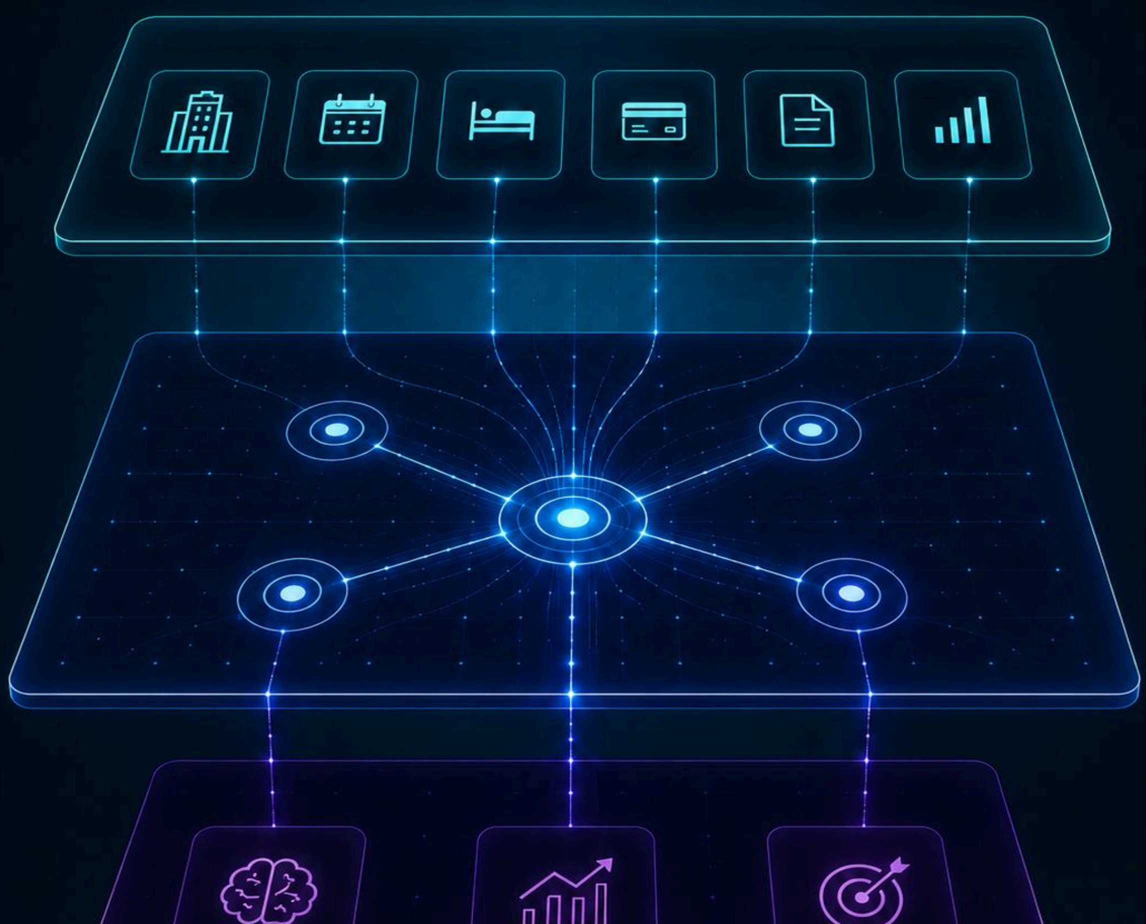
The issue is confidence. Buyers need rate accuracy, policy compliance, duty-of-care visibility, tax clarity, payment control, and spend reporting they can defend.

For Technology Partners

The opportunity is to become a control layer across complexity: improving data quality, connecting the right systems, and reducing manual intervention across the workflow.

Section 05

From Connectivity to Operating Infrastructure



The most important shift is conceptual.

Connectivity should no longer be viewed only as a distribution enabler. In modern business travel, connectivity is becoming operating infrastructure.

That infrastructure must support trust across the system.
It must help the ecosystem answer basic but often difficult questions:

- Is this the right property?
- Is this the right rate?
- What is included?
- What taxes apply?
- What was actually charged?
- Was payment completed?
- Is the folio accurate?
- Can the stay be reported correctly?

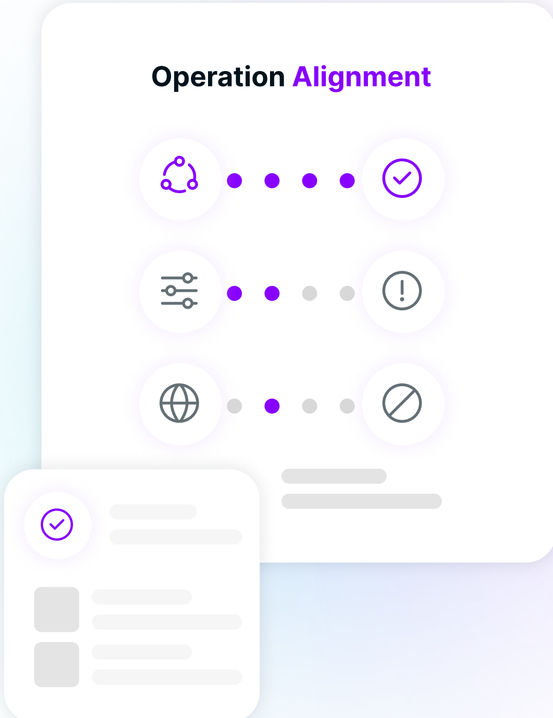
The ability to answer those questions consistently is what allows business travel to become more automated, more accountable, and more scalable.

The business challenge is not a lack of technology. It is the lack of consistent operating alignment across systems, data, workflows, and market requirements.

What the Industry Needs to Solve Next

The next phase of APAC business travel will require practical progress in five areas:

- A cleaner control layer for multi-source hotel content, with stronger normalization of property, room, rate, policy, and inclusion data.
- Stronger integration between booking records and hotel source-of-truth systems, especially where the final stay, charges, taxes, payments, and folio outcomes are recorded.
- More reliable payment, tax, invoice, commission, and reconciliation workflows that can support regional complexity without excessive manual intervention.



- Better regional configuration for China-to-global and APAC corridor travel, including language, compliance, payment, tax, service, and platform-specific expectations.
- Practical AI use cases that improve workflow intelligence, exception detection, validation, and operational productivity rather than adding another disconnected layer.

Section 06

DerbySoft's Role in the Next Chapter

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DerbySoft is Positioned at a Relevant Intersection

Hotel supply, distribution connectivity, regional platform relationships, China market expertise, and the infrastructure required to support increasingly complex business travel workflows.

The opportunity is to help the ecosystem move beyond fragmented transactions and toward a more trusted operating model. That means supporting better content and rate integrity, stronger PMS-level data flows, more reliable payment and tax handling, more efficient reconciliation, and more actionable reporting visibility.

This role is not purely technical. It is also commercial and educational. As the APAC market evolves, the industry will need partners that can translate complexity, connect the right stakeholders, and help turn fragmented data into more usable operating intelligence.

Closing Thoughts

APAC business travel is not waiting for the infrastructure to catch up. The market is already moving toward more sources, more platforms, more automation, and more regional complexity. The next phase of growth will depend on whether the industry can make the operating model as sophisticated as the shopping experience has become.

Beyond booking, the industry needs a stronger operating layer. That is where the next chapter of business travel will be defined.

This white paper is built on the candid, real-world insights of the senior industry leaders who joined DerbySoft for a roundtable in Singapore in May 2026. We are grateful to each of them for sharing their time, experience, and honest perspectives.