

Travel Industry Search Trends Report FY'25 India



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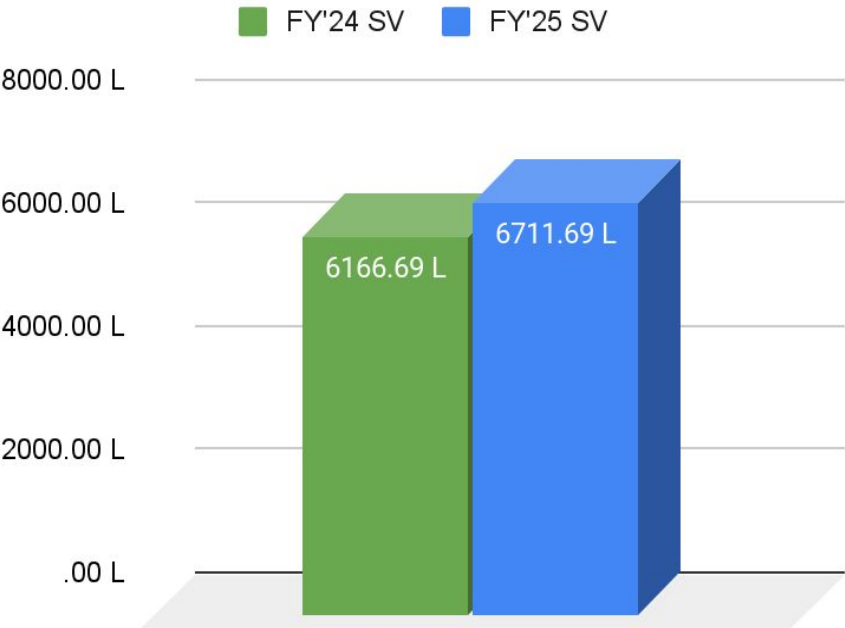
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Executive Summary

- In India, most travel journeys for people **begin with a Google search.**
- People run queries on **tour and travel packages** compare & contemplate their options, and make their decisions; which is why a clear understanding of **search behavior** is necessary for a **strong path to better digital marketing.**
- Our *Travel Industry Search Trends Report* **examines how customer behavior is evolving** and how your brand can leverage these trends to create a stronger digital presence.
- We investigate over **4L** keywords to evaluate the **brand and non-brand keywords, types & volumes of queries, opportunities for growth**, and so much more.
- We also include a list of **top-performing Online Travel Agencies (OTAs)** who dominate Google Search.

Travel Industry Search Trends



Category	FY'24 SV	FY'25 SV	% Growth
Travel	6166.69 L	6711.69 L	8.84%

Search Volume by Query Type

Type of Query	Search Volume FY'24	Search Volume FY'25	Growth %	Market Share
Brand	673.99 L	761.54 L	12.99%	11.35%
Non-Brand	5492.70 L	5950.15 L	8.33%	88.65%
Total	6166.69 L	6711.69 L	8.84%	100.00%

Top 10 Online Travel Agents by Search Volume

	Brand	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
	MakeMyTrip	54.58 L	61.03 L	11.83%	37.05%
	Skyscanner	36.28 L	44.32 L	22.16%	26.90%
	Goibibo	12.38 L	12.52 L	1.17%	7.60%
	Ixigo	4.24 L	10.75 L	153.60%	6.53%
	EaseMyTrip	10.85 L	10.31 L	-4.91%	6.26%
	Agoda	8.03 L	8.94 L	11.41%	5.43%
	Yatra	9.78 L	8.63 L	-11.70%	5.24%
	Booking.com	3.88 L	4.79 L	23.53%	2.91%
	Tripadvisor	2.27 L	2.07 L	-8.91%	1.25%
	Cleartrip	.83 L	1.23 L	48.43%	0.75%
	Others(1)	.17 L	.14 L	-18.64%	0.08%
	Total	143.27 L	164.74 L	14.99%	100.00%

Top 10 Indian Airline Brands by Search Volume

	Brand	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
	Indigo	107.58 L	117.26 L	9.00%	51.58%
	Vistara	39.11 L	40.29 L	3.03%	17.72%
	Air India	30.17 L	33.80 L	12.02%	14.87%
	SpiceJet	27.42 L	23.27 L	-15.16%	10.23%
	Akasa Air	6.54 L	6.32 L	-3.30%	2.78%
	Air Asia	3.26 L	2.16 L	-33.88%	0.95%
	Alliance Air	1.82 L	1.83 L	0.48%	0.80%
	Jet Airways	1.13 L	1.06 L	-6.24%	0.47%
	Star Air	.70 L	1.01 L	43.75%	0.45%
	GoAir(Go first)	1.25 L	.36 L	-71.35%	0.16%
	Total	218.98 L	227.36 L	3.83%	100.00%

Top 10 Bucket

Buckets	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Transportation	2832.81 L	2983.14 L	5.31%	44.45%
Accommodation	2425.48 L	2633.41 L	8.57%	39.24%
Natural Attractions	440.09 L	585.43 L	33.03%	8.72%
Tourism	153.36 L	169.65 L	10.63%	2.53%
Package Holidays	132.18 L	131.80 L	-0.29%	1.96%
Cultural & Historical Sites	83.41 L	103.24 L	23.77%	1.54%
Attractions and Experiences	63.79 L	65.65 L	2.91%	0.98%
Tour Operators and Travel Agencies	35.19 L	38.91 L	10.59%	0.58%
Business Travel	.37 L	.42 L	10.99%	0.01%
Travel Influencers and Content Creation	.02 L	.05 L	110.08%	0.00%
Total	6166.69 L	6711.69 L	8.84%	100.00%

Transportation – Categories

Sub Bucket	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Rail Travel	1181.88 L	1233.17 L	4.34%	41.34%
Air Travel	1021.52 L	1072.32 L	4.97%	35.95%
Road Travel	608.91 L	659.21 L	8.26%	22.10%
Water Travel	20.49 L	18.45 L	-9.98%	0.62%
Total	2832.81 L	2983.14 L	5.31%	100.00%

Accommodation – Categories

Sub Bucket	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Hotels	1432.87 L	1604.93 L	12.01%	60.94%
Resorts	896.62 L	920.74 L	2.69%	34.96%
Rentals	87.45 L	98.74 L	12.92%	3.75%
Houseboats	6.57 L	6.72 L	2.38%	0.26%
Camping & Glamping	1.36 L	1.44 L	5.93%	0.05%
Bed & Breakfasts	.62 L	.83 L	33.47%	0.03%
Total	2425.48 L	2633.41 L	8.57%	100.00%

Natural Attractions – Categories

Sub Bucket	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Beaches	260.03 L	343.86 L	32.24%	58.74%
Waterfalls	68.22 L	117.97 L	72.93%	20.15%
Mountains	68.52 L	77.34 L	12.88%	13.21%
National Parks	41.46 L	44.44 L	7.18%	7.59%
Wildlife Tourism	1.84 L	1.80 L	-2.26%	0.31%
Marine Wildlife	.02 L	.02 L	-6.09%	0.00%
Total	440.09 L	585.43 L	33.03%	100.00%

Top 10 Keywords

Keywords	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
hotels	90.40 L	107.73 L	16.09%	36.67%
hotels near me	54.51 L	97.93 L	44.34%	33.34%
train running status	41.47 L	37.97 L	-9.21%	12.93%
indian air line	11.98 L	11.97 L	-0.10%	4.08%
reservation train ticket booking	8.13 L	8.99 L	9.58%	3.06%
flight ticket	7.23 L	8.27 L	12.56%	2.81%
book aeroplane ticket	5.83 L	6.03 L	3.32%	2.05%
resorts near me	5.05 L	6.19 L	18.36%	2.11%
top cruise	4.76 L	3.84 L	-23.88%	1.31%
rooms near me	4.24 L	4.83 L	12.24%	1.65%

City-Wise Search Volumes

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Top 6 Cities	1900.76 L	1939.40 L	1.99%	28.90%
Next 10 Cities	600.18 L	614.18 L	2.28%	9.15%
Others	3665.75 L	4158.11 L	11.84%	61.95%
Total	6166.69 L	6711.69 L	8.12%	100.00%

Top 6 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Delhi	552.85 L	559.34 L	1.17%	28.84%
Bengaluru	400.77 L	414.04 L	3.31%	21.35%
Chennai	287.82 L	313.65 L	8.97%	16.17%
Mumbai	293.83 L	306.71 L	4.38%	15.81%
Hyderabad	222.18 L	187.92 L	-15.42%	9.69%
Pune	143.31 L	157.74 L	10.07%	8.13%
Total	1900.76 L	1939.40 L	2.03%	100.00%

Next 10 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Lucknow	103.82 L	109.12 L	5.11%	17.77%
Jaipur	77.17 L	85.83 L	11.23%	13.97%
Indore	65.02 L	67.35 L	3.58%	10.97%
Coimbatore	69.18 L	66.62 L	-3.70%	10.85%
Vadodara	51.11 L	54.90 L	7.42%	8.94%
Bhopal	53.34 L	54.44 L	2.06%	8.86%
Visakhapatnam	53.05 L	53.02 L	-0.06%	8.63%
Surat	45.55 L	47.90 L	5.16%	7.80%
Nagpur	48.62 L	39.42 L	-18.93%	6.42%
Ludhiana	33.32 L	35.59 L	6.79%	5.79%
Total	600.18 L	614.18 L	2.33%	100.00%

Top 10 Apps **by Downloads**



Apps	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
MakeMyTrip	123.00 L	138.00 L	12.20%	30.14%
Goibibo	62.00 L	73.60 L	18.71%	16.07%
Ixigo	42.50 L	62.40 L	46.82%	13.63%
Agoda	72.10 L	40.90 L	-43.27%	8.93%
Booking.com	33.90 L	35.70 L	5.31%	7.80%
Skyscanner	28.40 L	26.40 L	-7.04%	5.77%
EaseMyTrip	17.30 L	23.40 L	35.26%	5.11%
Cleartrip	44.50 L	12.90 L	-71.01%	2.82%
Wego	14.30 L	12.10 L	-15.38%	2.64%
Yatra	9.60 L	11.40 L	18.75%	2.49%
Others (11)	28.39 L	21.10 L	-25.67%	4.61%
Total	475.99 L	457.90 L	-3.80%	100.00%

"Near-Me" Searches

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	10.27 L	13.12 L	21.74%	6.33%
Non-Brand	128.49 L	194.12 L	33.81%	93.67%
Total	138.75 L	207.24 L	33.05%	100.00%

Vernacular Search Volumes

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	1.21 L	2.18 L	79.77%	15.74%
Non-Brand	11.69 L	11.68 L	-0.07%	84.26%
Total	12.90 L	13.86 L	7.44%	100.00%

Top 5 Brands **with Highest Share of Voice (SOV)**

	Top Brands	% Growth
	makemytrip.com	84.07%
	goibibo.com	79.14%
	ixigo.com	51.17%
	cleartrip.com	34.00%
	easemytrip.com	33.72%

SOV = Share of Voice (% of Ranked SV/Total SV)

SV = Search Volumes

The brands listed here are consistently showing up in the Top 5 listings due to a strong SEO strategy being implemented.

Key Insights

- **MakeMyTrip** and **Skyscanner** collectively control nearly **70%** of the market, establishing them as the clear market leaders.
- **Ixigo** is exhibiting an extraordinary growth rate of **153.60%**, more than tripling its search volume year-over-year.
- Searches related to **Transportation** and **Accommodation** collectively command an overwhelming **83.69%** of the total market share in the travel sector.
- Searches related to **Natural Attractions** and **Cultural & Historical Sites** are experiencing exceptional growth rates of **33.03%** and **23.77%** respectively.

Data-Collection Process

- The research was conducted for FY'25 using Google's Keyword Planner
- The data reflects Pan-India search volumes only, except where city-level data is shown
- Search volumes on Google Web Search for app-related keywords and not Playstore have been taken into account
- Search volumes for vernacular languages - where available - only reflect data for the Hindi language

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