

Hotel Industry Search Trends Report FY'25 India



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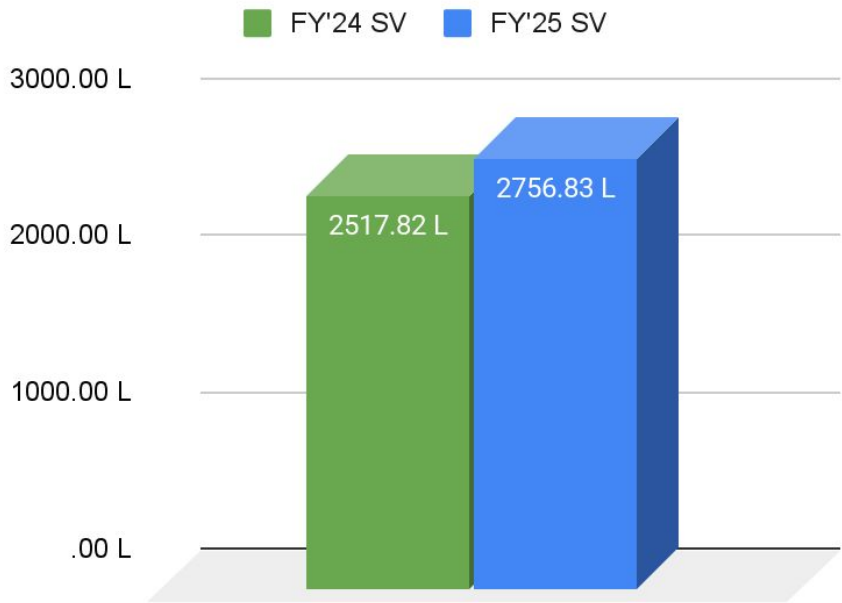


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Executive Summary

- In India, most **hotel and resort booking** journeys begin with a Google search.
- People search for **hotels, compare prices, read reviews, explore amenities**, and make their booking decisions online—making it crucial to understand search behavior for effective digital marketing.
- Our **Hotel Industry** Search Trends Report explores how consumer search patterns are evolving and how your brand can harness these insights to build a stronger digital presence.
- We analyze **110,000+ keywords** to evaluate brand vs. non-brand searches, search volumes, seasonal trends, high-converting query types, and key areas for growth.
- The report also highlights the top-performing hotel brands and platforms that consistently lead in Google Search rankings.

Hotel Industry Search Trends



Category	FY'24 SV	FY'25 SV	% Growth
Hotels and Resorts	2517.82 L	2756.83 L	9.49%

Search Volume by Query Type

Type of Query	Search Volume FY'24	Search Volume FY'25	Growth %	Market Share
Brand	312.61 L	356.26 L	13.96%	12.92%
Non-Brand	2205.21 L	2400.57 L	8.86%	87.08%
Total	2517.82 L	2756.83 L	9.49%	100.00%

Top 10 Brands by Search Volume



Brand	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Radisson Blu	21.87 L	23.93 L	9.46%	6.72%
Taj Hotels	20.03 L	23.39 L	16.77%	6.56%
OYO Rooms	9.69 L	11.38 L	17.41%	3.19%
ITC Hotels	9.28 L	11.11 L	19.74%	3.12%
Lemon Tree Hotels	8.62 L	10.30 L	19.44%	2.89%
Hotel Sterling	6.01 L	6.66 L	10.82%	1.87%
Club Mahindra	7.31 L	6.58 L	-10.00%	1.85%
Novotel Hotel	5.74 L	6.54 L	13.93%	1.84%
The Lalit Hotel	5.19 L	5.12 L	-1.24%	1.44%
Marriott Bonvoy	3.69 L	4.94 L	33.78%	1.39%
Others(254)	215.18 L	246.31 L	14.47%	69.14%
Total	312.61 L	356.26 L	13.96%	100.00%

Top Keyword Buckets

Buckets	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Hotels	1470.81 L	1680.78 L	14.28%	60.97%
Resorts	933.17 L	939.28 L	0.65%	34.07%
Vacation Rentals	84.03 L	96.36 L	14.68%	3.50%
Banquets And Wedding Halls	19.41 L	29.02 L	49.46%	1.05%
Houseboats	6.39 L	6.61 L	3.47%	0.24%
Camping & Glamping	1.31 L	1.50 L	14.02%	0.05%
Conference Room Or Meeting Room	1.11 L	1.36 L	22.87%	0.05%
Destination Wedding	.99 L	1.13 L	13.78%	0.04%
Bed & Breakfasts (B&Bs)	.59 L	.79 L	32.77%	0.03%
Total	2517.82 L	2756.83 L	9.49%	100.00%

Top Hotels Sub – Buckets

Buckets(Hotel)	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Hotel booking	546.76 L	673.51 L	23.18%	40.07%
Popular destination	461.99 L	479.56 L	3.80%	28.53%
Top city	186.73 L	202.06 L	8.21%	12.02%
Religious place	162.95 L	169.38 L	3.95%	10.08%
Near me	97.57 L	137.50 L	40.91%	8.18%
Luxury Hotel	7.92 L	9.76 L	23.31%	0.58%
Hotel with spa	1.95 L	2.50 L	28.24%	0.15%
Boutique hotel	1.67 L	2.24 L	34.15%	0.13%
Hotel with restaurant	.96 L	1.68 L	75.44%	0.10%
Family friendly	1.01 L	1.05 L	4.05%	0.06%
Others(5)	1.30 L	1.54 L	18.29%	0.09%
Total	1470.81 L	1680.78 L	14.28%	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%	47.79%
Hotels near me	54.51 L	97.93 L	44.34%	43.44%
Lodge near me	3.76 L	4.36 L	13.81%	1.94%
Resorts near me	5.05 L	6.19 L	18.36%	2.75%
Hotels in Puri Orissa	1.47 L	1.73 L	15.13%	0.77%
Hotels in Mount Abu Rajasthan	1.08 L	1.43 L	24.40%	0.64%
Resorts inside Bangalore	1.49 L	1.53 L	2.62%	0.68%
Resorts in Karjat	1.54 L	2.01 L	23.03%	0.89%
Hotels in Nainital Uttarakhand	.92 L	1.30 L	29.31%	0.58%
Hotel stay in Mussoorie	.85 L	1.20 L	29.21%	0.53%

City-Wise Search Volumes

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Top 6 Cities	768.50 L	686.60 L	-11.93%	24.91%
Next 10 Cities	188.15 L	164.58 L	-14.32%	5.97%
Others	1561.17 L	1905.65 L	18.08%	69.12%
Total	2517.82 L	2756.83 L	8.67%	100.00%

Top 6 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Bengaluru	216.60 L	195.20 L	-9.88%	28.43%
Mumbai	162.50 L	139.70 L	-14.03%	20.35%
Delhi	137.90 L	125.30 L	-9.14%	18.25%
Chennai	98.10 L	91.60 L	-6.63%	13.34%
Pune	76.40 L	69.40 L	-9.16%	10.11%
Hyderabad	77.00 L	65.40 L	-15.06%	9.53%
Total	768.50 L	686.60 L	-10.66%	100.00%

Next 10 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Jaipur	35.80 L	32.50 L	-9.22%	19.75%
Lucknow	21.80 L	20.70 L	-5.05%	12.58%
Indore	21.27 L	19.37 L	-8.93%	11.77%
Surat	21.20 L	19.18 L	-9.53%	11.65%
Coimbatore	21.87 L	16.80 L	-23.18%	10.21%
Vadodara	17.49 L	15.68 L	-10.35%	9.53%
Nagpur	15.65 L	11.80 L	-24.60%	7.17%
Visakhapatnam	11.42 L	9.82 L	-14.01%	5.97%
Ludhiana	11.83 L	9.82 L	-16.99%	5.97%
Bhopal	9.82 L	8.91 L	-9.27%	5.41%
Total	188.15 L	164.58 L	-12.53%	100.00%

“Near-Me” Searches

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	10.05 L	12.27 L	18.10%	7.41%
Non-Brand	109.10 L	153.35 L	28.85%	92.59%
Total	119.15 L	165.62 L	28.06%	100.00%

The contribution from both brand and non-brand keywords, when the term “near me” is included, was higher in FY'25.

Brand keywords include:

- *oyo hotel near me*
- *lemon tree hotel near me*

Non Brand keywords include:

- *hotels near me*
- *rooms near me*

Vernacular Search Volumes

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	0.47 L	0.55 L	16.27%	13.10%
Non-Brand	3.28 L	3.64 L	11.12%	86.90%
Total	3.75 L	4.19 L	11.77%	100.00%

Brand keywords include:

- ताज होटल
- हयात होटल

Non Brand keywords include:

- वाराणसी में सस्ते होटल
- होटल

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





	Top Brands	% Growth
	OYO Rooms	32.94%
	Taj Hotels	5.30%
	Marriott Bonvoy	1.58%
	ITC hotels	1.53%
	Radisson Hotels	1.08%

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.

Top 5 Brands **with Highest SOV (Resorts)**

	Top Brands	% Growth
	Jungle Lodges	1.02%
	Heritage Village Resorts	0.94%
	Taj Hotel	0.79%
	Marriott Bonvoy	0.68%
	Ananta Hotels	0.59%

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.

Top 5 Brands **with Highest SOV (Banquets And Wedding Halls)**

	Top Brands	% Growth
	The Villa	2.00%
	Costas Countryside	1.93%
	The Tamarind Tree	1.04%
	Ambaari Venue	0.45%
	Royal Pepper Banquets	0.36%

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

- In FY'25, **Hotels and Resorts** search volume grew by 9.49%, driven by faster growth in **brand queries (13.96%)**, though non-brand searches still dominate with 87.08% market share.
- Brand search volume grew by 13.96%, with **JW Marriott (33.78%)**, **ITC (19.74%)**, and **Lemon Tree (19.44%)** leading growth, while Club Mahindra and The Lalit saw declines
- **Hotels** remained the dominant segment with **60.97%** share, while **Banquets & Wedding Halls** saw the highest growth at **49.46%**, signaling rising interest in event-based hospitality services.
- Search volume shifted away from major cities, with **Top 6** and **Next 10** Cities declining by **11.93%** and **14.32%** respectively, while **"Others"** grew **18.08%**, now accounting for **69.12%** of total volume indicating rising interest in tier-2/3 and emerging destinations.

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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