

India Online Travel - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

India Online Travel Market Analysis

The India online travel market size stands at USD 23.1 billion in 2025 and is expected to touch USD 33.9 billion by 2030, reflecting a 7.76% CAGR. Robust smartphone adoption, now surpassing 944.7 million wireless data users, and government-backed digitization programs continue to shift booking habits from offline channels to mobile-first platforms. The India online travel market benefits from the country's position as the sixth-largest domestic aviation arena, with passenger traffic on course to double within the decade. Intensifying competition among Online Travel Agencies (OTAs) is leading to deeper loyalty programs, vernacular interfaces and dynamic pricing as the primary levers for customer stickiness. At the same time, suppliers are investing in direct sales tools to trim third-party commissions, nudging the India online travel market toward a mixed distribution structure of aggregated and proprietary channels.

India Online Travel Market Trends and Insights

Rising adoption of UPI & digital wallets accelerating seamless bookings

Digital wallets complete nearly half of all transactions inside the India online travel market, eliminating checkout friction and enabling impulse purchases. UPI's 2025 international roll-out in France, Nepal and Qatar extends payment continuity for Indians abroad, while the UPI One World wallet lets foreign visitors pay domestic suppliers seamlessly. Apple's App Store reported INR 44,447 crore (USD 5.31 billion) in travel purchases in 2024, proof that mobile-native payments underpin booking frequency .

Platforms now optimize conversion through one-tap checkouts, reinforcing wallet dominance inside the India online travel market.

Government's UDAN scheme expanding regional air connectivity

A decade-long extension with 120 additional destinations positions UDAN to democratize flying and channel fresh traffic into the India online travel market. Capped fares at INR 2,500 for one-hour hops have bridged the cost gap between air and premium coach travel, while 619 operational routes support 88 airports. Budget 2025's INR 540 crore outlay for new helipads in hilly districts unlocks previously remote leisure spots, feeding a 17.84% CAGR in experiences bookings. OTAs gain depth in under-served cities and lower reliance on saturated metros, further broadening the India online travel market footprint.

Fragmented unorganized accommodation supply limiting digitization

Tens of thousands of small family-run lodges lack property-management systems, leaving significant inventory invisible online. The National Digital Tourism Mission hopes to bridge gaps, yet rollout needs sustained training and capex infusion. OYO's franchise standardization drive highlights the scale of challenge-its valuation recoil from USD 10 billion to USD 2.4 billion underscores execution hurdles. Until long-tail hotels come online, the India online travel market will struggle to offer wall-to-wall coverage, especially outside metros.

Other drivers and restraints analyzed in the detailed report include:

Domestic tourism surge fueled by social-media influence / Rapid growth of middle-income millennials' discretionary spending / Regulatory uncertainty on convenience fees & refund norms /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Air Ticket Booking contributed 37.56% of the India online travel market in 2024, a lead built on standardised global distribution systems and routine price comparisons. Strong airline-OTA ties allow real-time seat visibility, cementing the segment's online skew. Experiences & Activities, though niche at present, is growing at 17.84% CAGR, mirroring a generational tilt toward memories over possessions. The India online travel market size for experiences is forecast to expand rapidly as remote locales join UDAN networks. Rail booking remains resilient thanks to IRCTC's robust API, whereas buses serve cost-sensitive tier-III corridors. Holiday packages increasingly bundle flights, rooms and activities, giving OTAs a larger wallet share per traveler. Fragmented car-rental operators are slowly aggregating under app-based intermediaries, broadening the India online travel market horizon toward multimodal, end-to-end itineraries.

Second-order momentum arises from cross-sell strategies: OTAs promote activities during flight checkout, boosting attachment rates without extra acquisition spend. Suppliers also experiment with subscription passes that guarantee fare discounts, locking users into proprietary ecosystems. Yet unlisted homestays still escape digital capture, signaling upside once long-tail supply digitizes. Overall, the service-mix points to a maturing India online travel market where ancillary revenues outpace headline ticket volumes.

Mobile accounted for 66.67% of 2024 bookings and is tracking a 12.8% CAGR, underscoring its centrality to the India online travel market. Push-notification price alerts drive timely conversions, while biometric log-ins shorten the funnel. Desktop remains relevant for complex multi-leg itineraries and corporate policy integration, but its share is eroding as apps incorporate advanced planning features. Rural broadband upgrades support video-heavy destination content, deepening engagement. App-exclusive cashback campaigns further tilt traffic toward handsets, reinforcing the India online travel market's mobile bias.

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Rapid 5G deployment is expected to unlock immersive VR previews of hotels and attractions, enriching decision-making within apps. Adaptive design has reduced abandonment on low-RAM devices, while vernacular interfaces attract first-time bookers in smaller towns. Cross-device identity stitching allows seamless hand-offs between research on desktops and checkout on mobiles, maximizing conversion. Consequently, tech spend now prioritizes app performance metrics over website A/B tests.

India Online Travel Market Report is Segmented by Service Type (Air Ticket Booking, and More), by Booking Device (Desktop / Laptop and Mobile), by Business Model (Online Travel Agencies, Direct Supplier Online Platforms, and More), by Traveler Type (Leisure, and More), by Age Group (18-30 Years, and More), by Payment Mode (Credit / Debit Cards and More), by City Tier (North India, South India, and More).

List of Companies Covered in this Report:

MakeMyTrip Ltd. (incl. Goibibo, redBus) / Yatra Online Ltd. / EaseMyTrip (Easy Trip Planners Ltd.) / Cleartrip Pvt. Ltd. (Flipkart Group) / Ixigo (Le Travenues Technology Ltd.) / Airbnb Inc. / Booking Holdings Inc. (Booking.com, Agoda) / OYO Rooms / Thomas Cook (India) Ltd. / IRCTC Ltd. / Paytm Travel (One 97 Communications) / Amazon Pay Travel (Amazon India) / SOTC Travel Ltd. / FabHotels / Treebo Hotels / RailYatri / Ola Cabs (ANI Technologies) - Ola Outstation / Uber India Systems - Uber Rentals / Zoomcar India Pvt. Ltd. / Revv Self-Drive Cars* /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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