



Travel Rewired

Decoding the
Indian Traveler

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1. Foreword



Indians' love for travel continues to drive strong travel demand. As per Google data, India is one of the fastest growing travel markets and second largest after the US. It is also one of the fastest growing source markets among top 5 markets globally. This is India's time to fly! And that's why Google & Kantar came together to commission a research to deliver a first of its kind report that unpacks the ever-elusive Indian traveler - **Travel Rewired: Decoding the Indian Traveler**.

The research was conducted to explore 4 key objectives - Exploration & Inspiration, Research & Planning, Traveler Archetypes and Destination Dupes. Desire to travel is piqued from many sources and several digital touchpoints play a role in this. The report attempts to capture top sources of inspiration. As planning gets serious, use of research tools intensifies - 7 sources are referenced on an average Search, YouTube and Online Travel Aggregators (OTAs) and important touchpoints with AI catching up fast. Diversity of need-states mean there are many traveler types and the report captures 4 key archetypes and their unique behaviors. Indian travelers are keen to explore both international destinations as well places closer to home. Top destinations keep changing in pecking order and the report captures the top and trending destinations.

The research was conducted across Metros, Tier 1 and Tier 2 cities in India with a sample size of 1000 respondents across age groups of 18-45+. The research was balanced across primary decision makers & influencers in the decision-making. We are confident that this report is uniquely positioned to help travel ecosystem understand the Indian traveler better and help them serve in the best possible way so that Indians can focus their energies on what they love the most - TRAVEL!



Roma Datta Chobey

Managing Director
Digital First Businesses, Google India

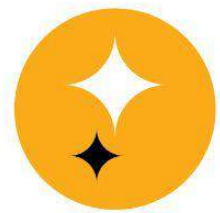


2.Exploration & Inspiration

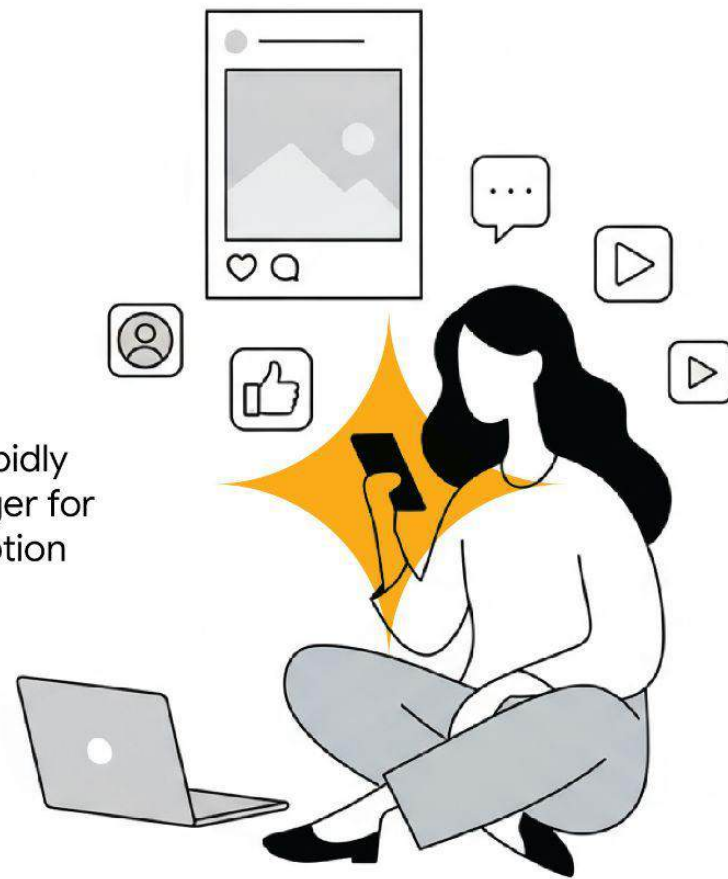


Exploration & inspiration

From first time travelers to globe trotters, Indians find the inspiration to travel online



For Indian travelers, AI is rapidly emerging as a game-changer for travel inspiration, with adoption growing significantly.

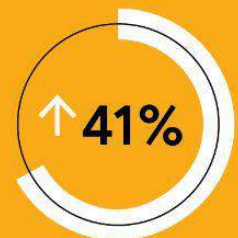


SOURCE: Google x Kantar India Travel 2025 Which of the below sources did you use to get inspiration for your trip? Base: All Travelers = 1,000; International = 495; Domestic = 505; How influential were each of these sources when getting inspiration? Base: All Travelers = 1,000

Google products are dominant when it comes to inspiration - YouTube and Search supported by specific travel products



use **YouTube** for travel inspiration, the #1 source among OTA, search Instagram, etc



heavily rely on creators for travel inspiration



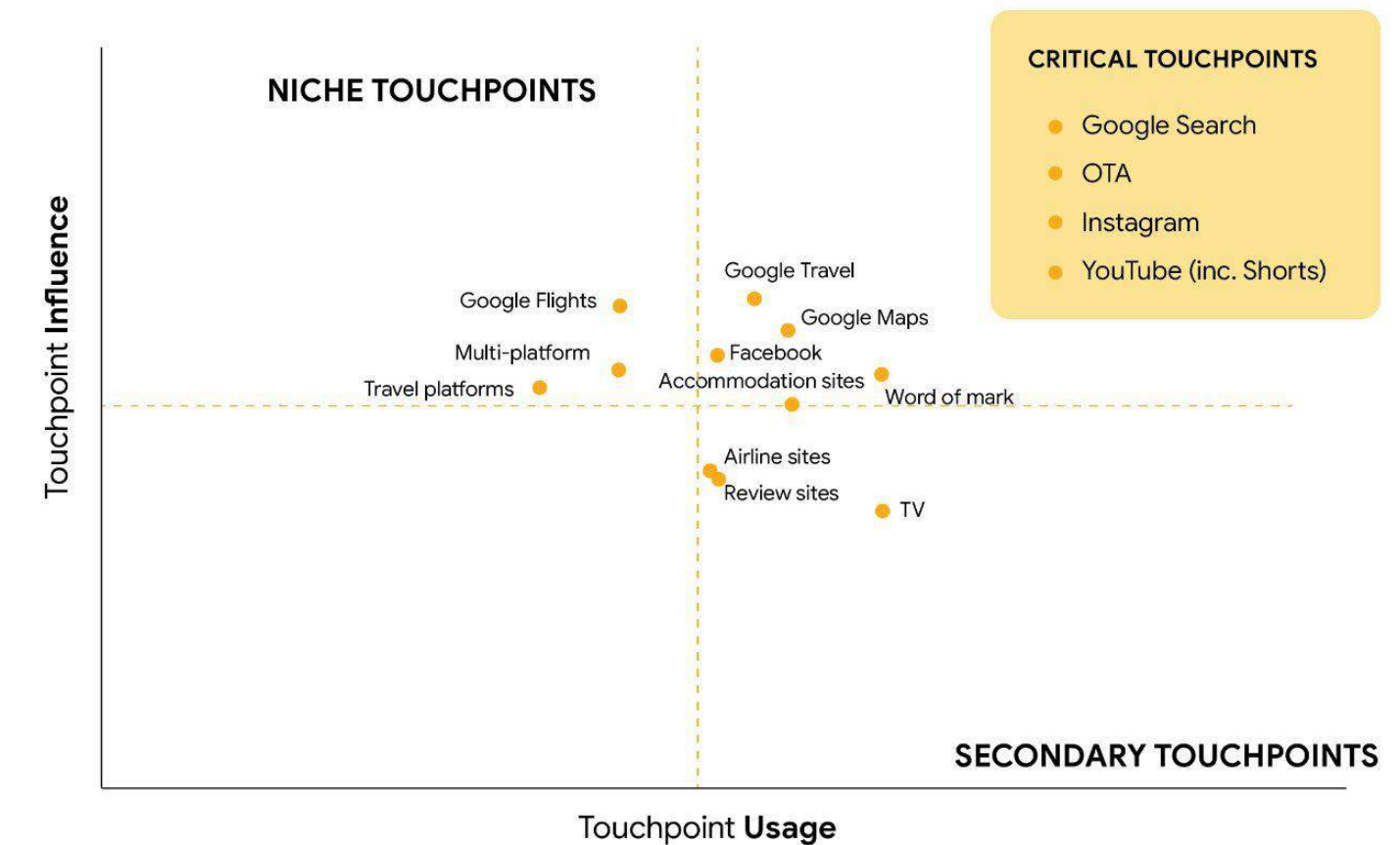
Search is amongst the top used sources. 1 in 3 Indian travelers use Google Maps/ Google Travel as a source of inspiration

7

touch points used, on average

96% used online sources
18% trips involved jet-setting

Google products are not only widely used but highly influential when looking for travel inspiration

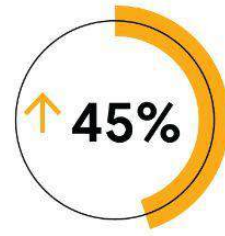


YouTube's Role In Inspiration

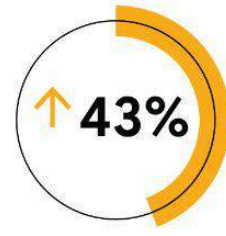
Which information is sought on YouTube?



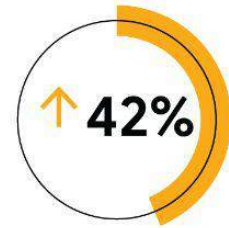
Information on key activities



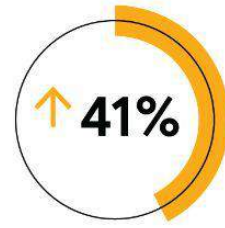
Vlogs from travelers



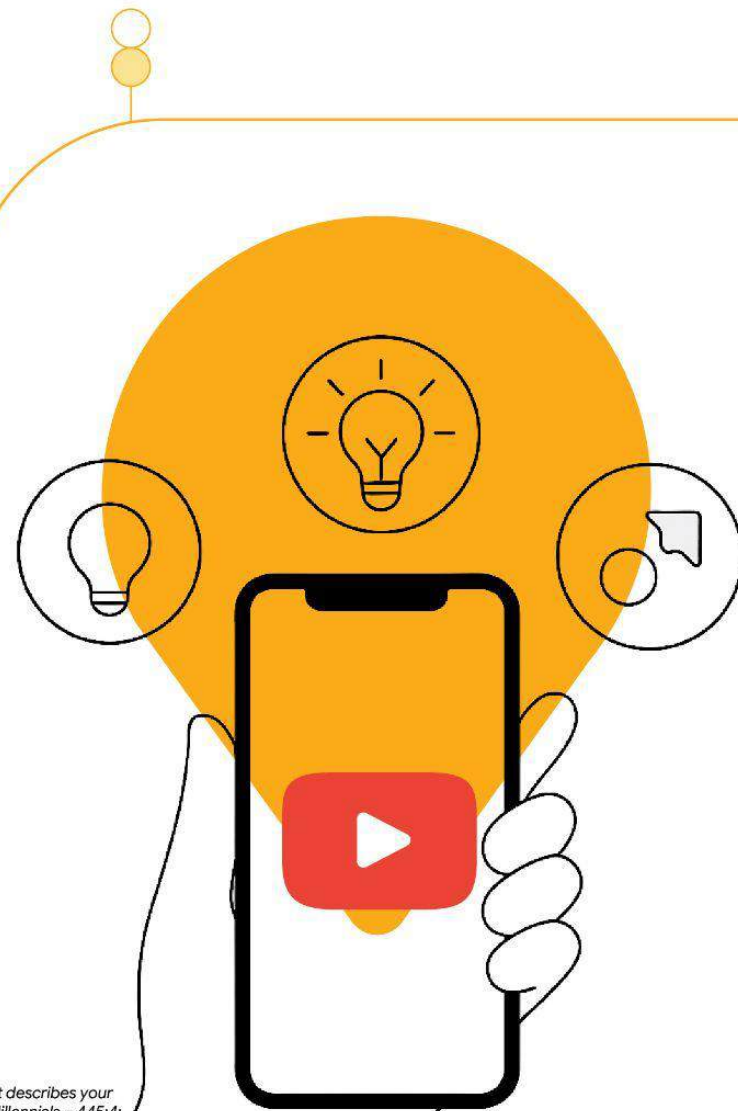
Brand & provider discovery



Best time of year to visit

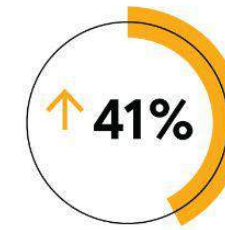


Destination inspiration



SOURCE: Google x Kantar India Travel 2025 What type of inspiration were you looking to get from the following sources / platforms? Base: YouTube Users n=555 Which of the below best describes your usage of Influencers as a source of information during the research and planning of your most recent trip? Base: All Travelers = 1,000; International = 495; Domestic = 505; Gen Z = 471; Millennials = 445; 4; Men = 499; Women = 498; Metro = 539; T1 = 345; 1st time travelers = 272; Seasoned = 327 What types of information were you looking for from Influencers when researching your trip? How influential were Influencers when getting inspiration for your latest trip? Reliant on Influencers n=883 How influential were Influencers when getting inspiration for your latest trip? Reliant on Influencers n=883

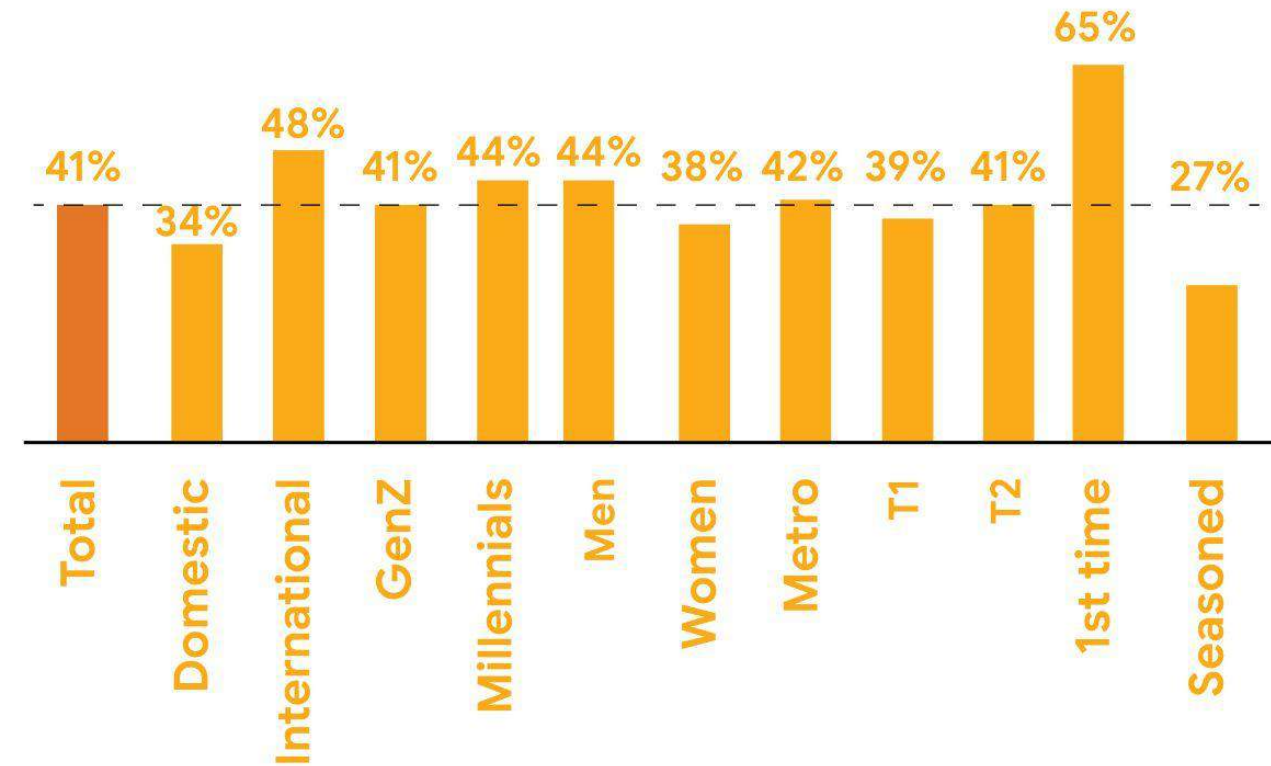
Creators make aspirations seem attainable; they are revolutionising discovery through exciting & engaging content



of travelers were highly reliant on creators during trip planning



of those who were reliant on creators described them as very influential



Which information from creators is most useful?



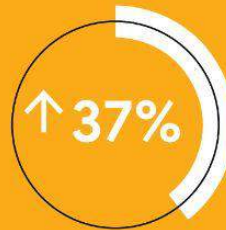
Information on estimated costs



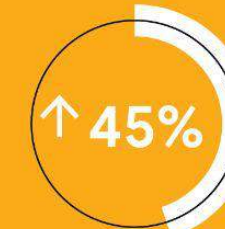
Videos / images of the destination



Information on accommodation available



Info on flights to destination



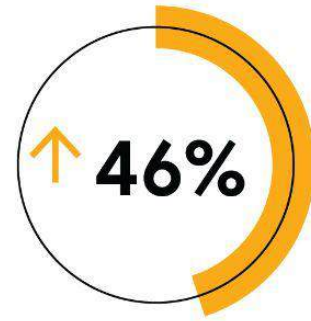
Information on key activities at destination

Role of Search in Inspiration

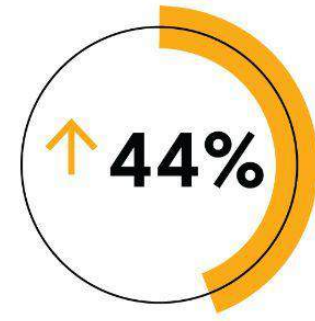
Which information is sought on Search?



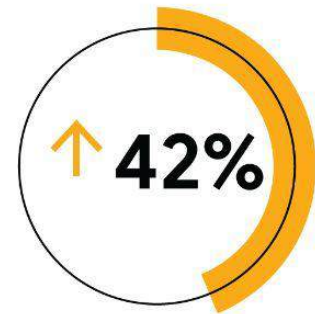
Information on key activities



Information on accommodation



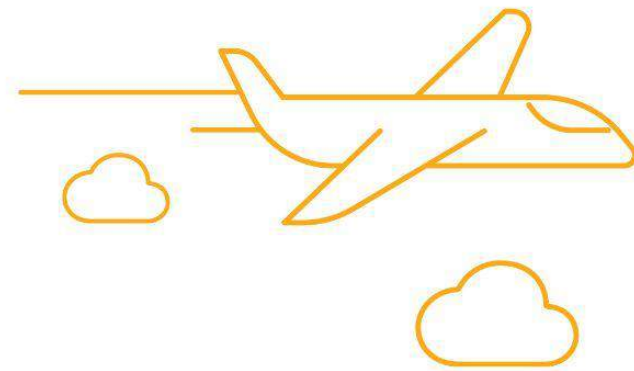
Destination inspiration



Accurate maps of destination



Best time of year to visit

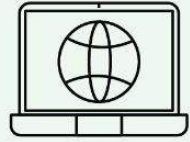


Search continues to remain the biggest influencer for INSPIRATION too! Contrary to popular belief the journey can start with an INTENT too!



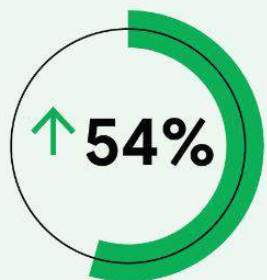
3. Research & Planning



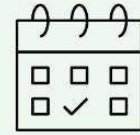


The role of OTAs

Multiple sources are referenced when researching and planning travel (7 touchpoints on average), OTAs are one of the most critical touch points - they are a one-stop shop for information on accommodation, flights, activities, plus value add services like connectivity products, upgrades and payment plans.

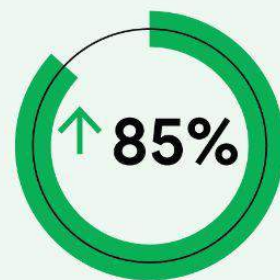


Used an OTA on average when researching accommodation or



Online bookings

Indian travelers prefer the convenience of booking their travel online, if they have a choice. And there's benefits to travel brands embracing online bookers - they research more, spend more, and travel further.



Prefer to book their trip online, If they have the choice



Trust is critical

Brand trust has the power to drive travelers to choose accommodation and airline brands and travel booking platforms. Securing a great reputation, delivering to customer expectations, acting with integrity, being authentic, reliable, relevant and transparent all help to build trust.

#1

Trust drives choice of accommodation and airline brands

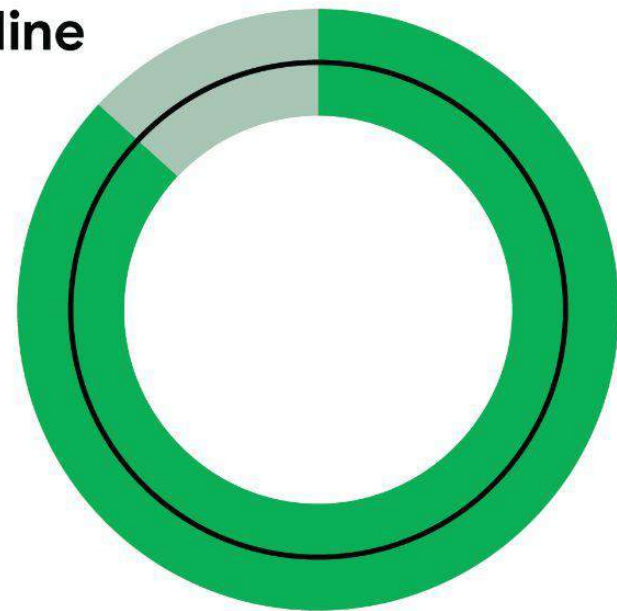


SOURCE: Google x Kantar India Travel 2025 Question: ACC1. Which of the below sources did you use to find information when specifically looking for your accommodation? Total Sample n=432; Question: FL1. Which of the below sources did you use to find information when specifically looking for your flights? n=432. Thinking about your travelling preferences in general, please select which of the below most applies to you. All travelers n=1000 Accommodation: Why did you choose this brand? n=432 Why did you choose this platform? n=419 Flights: Why did you choose this airline? n=432 Why did you choose this platform? n=432

Research & Planning channels

From research to booking, travelers are increasingly more dependent on digital touchpoints

↑ **15%**
prefer to book their trips **offline**



↑ **85%**
prefer to book their trips **online**

SOURCE: Google x Kantar India Travel 2025 Thinking about your travelling preferences in general, please select which of the below most applies to you. Please select one option for each pair. All travelers n=1000; Question: ACC1. Which of the below sources did you use to find information when specifically looking for your accommodation? Total Sample n=432; Question: FL1. Which of the below sources did you use to find information when specifically looking for your flights? n=432; Question: How influential were the following sources in your final decision making? Base n varies from 165 to 249 The Index of 'very influential' has an average of 100 across all touchpoints. Five stars: 115+; Four stars: 110-114; Three stars: 105-109; Two star: 100-104; one star: <100



- 24% OTA / aggregator website
- 18% Hotel or accommodation brand website
- 9% Vacation rental website



- 25% OTA / aggregator website
- 20% Airline brand website
- 12% Hotel or accommodation brand website

Travelers rely heavily on Search, YouTube and OTAs for accommodation and flight research



7 touchpoints used, on average

97% used online
68% used offline



7 touchpoints used, on average

97% used online
70% used offline

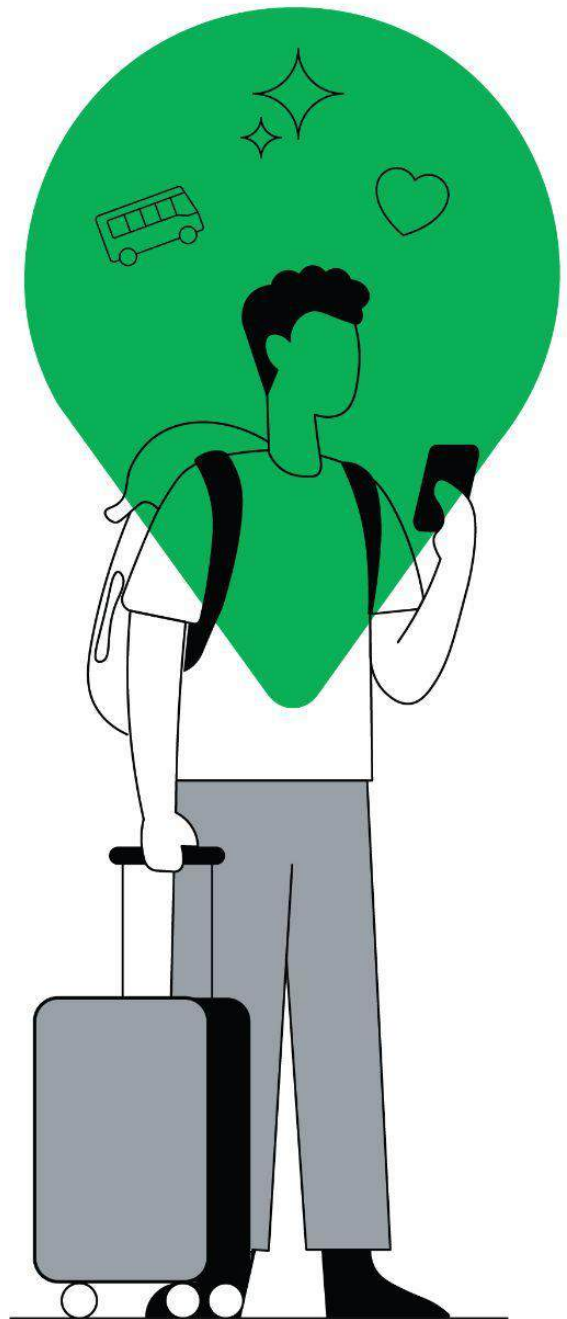


Accommodation / flight provider sites

Key Touchpoints



OTA/ Aggregator site





Search



What is searched about hotels

- Information on types of accommodation available
- Reviews and recommendations
- Logistics (i.e. connectivity, how to get there)
- Location info and nearby destinations / activities
- Actual photos of the accommodation



What is searched about airlines

- Airline reputation and reliability
- Reviews and recommendations
- Info on different seats available
- In-flight experience
- Finding out about brands and providers



YouTube



What is watched on YT

- Reviews and recommendations
- Location info and nearby destinations / activities
- Information on types of accommodation available
- Videos of the accommodation
- Actual photos of the accommodation



What is watched on YT

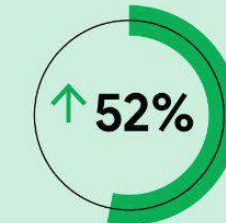
- Info on different seats available
- Finding out about brands and providers
- Airline reputation and reliability
- In-flight experience
- Reviews and recommendations



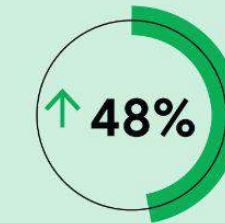
OTAs

Popular 'Bundling' Elements

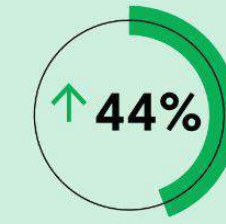
Imagine you are booking a trip with your favoured travel agent or aggregator, what elements would you be willing to book with this provider?



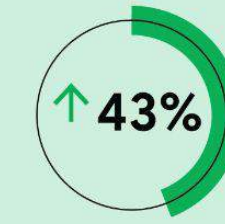
Accommodation



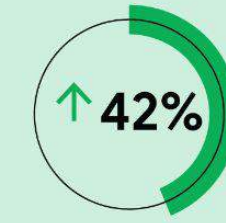
Car Rental



Flights



Destination Activities



Connectivity Products

SOURCE: Google x Kantar India Travel 2025
What type of information were you looking to get from the following sources / platforms?
Base: Google Search Users = n= 212 Accom / n= 189 Flights

SOURCE: Google x Kantar India Travel 2025
What type of information were you looking to get from the following sources / platforms?
Base: YouTube Users = n= 223 Accom / n= 238 Flights

Appealing Additional Services

Some travel agents offer extra services to travelers. Which of the following services did you use when deciding on your trip?

#1

Refunds

#2

Lounge Access

#3

Installments

#4

Food options

#5

Zero prepayments



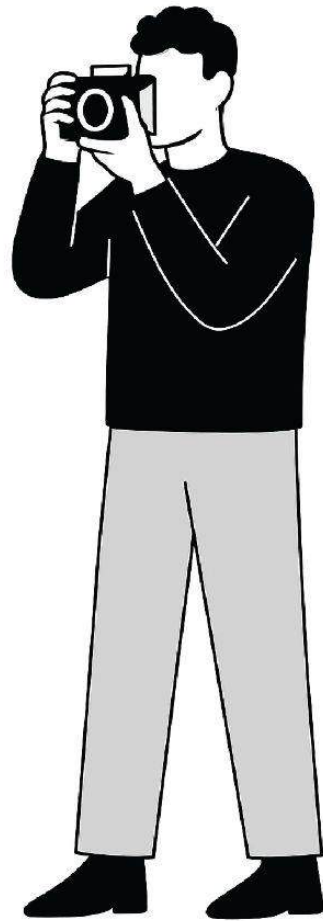
4. Traveler Archetypes



Four Traveler Types

Memory Makers

Take niche travel termed 'moment-cations', including gig-tripping, sports and set-jetting



Globe Trotters

Travelers who have taken an international trip, for any purpose, in the last 12 months



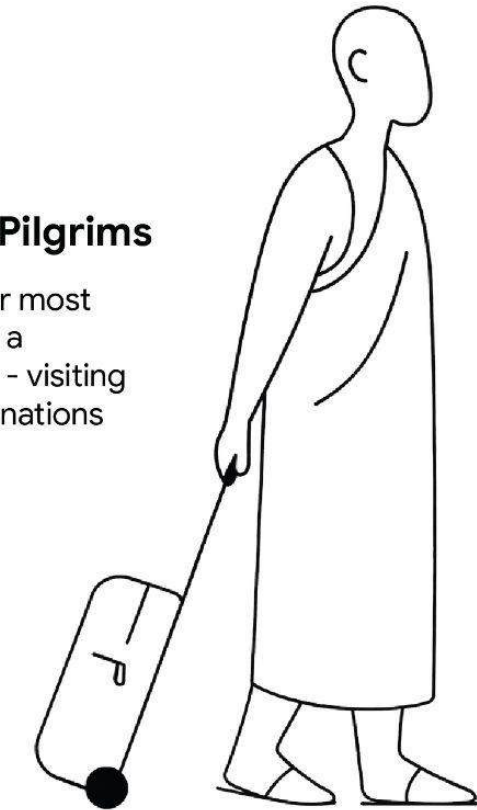
Novice Travelers

First timers who have travelled, planned or paid for a trip for the first time in the last year



Religious Pilgrims

Describe their most recent trip as a 'religious trip' - visiting spiritual destinations





Memory Makers

Profile: Predominant cohort: Male GenZ and are First time travelers 36% (vs 27% average)

Planning Behavior/Preference

- ♥ Memory Makers **research in a diverse range of languages** - especially **Hindi** (55% vs 48% average)
- ♥ Focus on **passion and hobbies** - To uncover newer experiences
- ♥ Travel tends to be longer with **extended trips of 11+ days** to experience music, sport or movie moments
- ♥ 55% of Memory Makers were **highly reliant** on creators in their research (vs 41% avg)

- ♥ Memory Makers take **around a week to plan their trip**
- ♥ Use **10 touchpoints** for inspiration (vs 7 for average)
- ♥ Over-indexing on **travelling with friends** (37% vs 31% average)
- ♥ Often combine **value added products** like **connectivity** (52% vs 39%) and **travel insurance** (47% vs 36%)

Future Travel

62%

Particularly interested in **bucket-list travel** in the future (vs 50% average)

39%

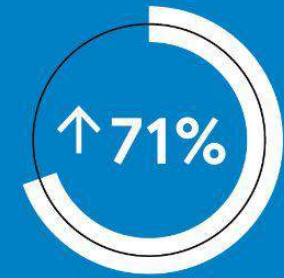
Memory Makers take 'moment-cations' - niche trips inspired by music, sports and movies; they are fans, following their passions - they are gig-trippers, sports enthusiasts and set-jettiers

64%

prefer to travel more **internationally**
Average: 59%



Among surveyed travelers who described their most recent trip as a jetsetting, sports, or music-focused trip, said they used YouTube when looking for information from creators on travel.



Among surveyed travelers who described their most recent trip as a jetsetting, sports, or music-focused trip, said YouTube is the top source for travel inspiration

SOURCE: Google x Kantar India Travel 2025 Thinking back to your most recent (#1.S5_HIDDEN) trip, how would you describe the type of trip you took? n=1000 Question: B5 Locations of Trip Base: International Memory Makers n=214, Question: B6 Locations of Trip Base: Domestic Memory Makers n=171 A1. Trade-Offs Base: All Travelers n=1000; Memory Makers n=385 How much time passed between the point when you started to explore/research your trip and when you finally booked it? Base: Memory Makers =385 L1. When looking for information when planning trips, what language do you typically search in? Base: Memory Makers =385 Thinking back to your most recent <PIPE S9b: domestic or international> trip, what were the main motivations of your travel? Base: Memory Makers =385 Still thinking back to your most recent (#1.S5_HIDDEN) trip, who did you travel with? Base: Memory Makers =385 Thinking back to your most recent trip, how long was the duration of the trip itself? Base: Memory Makers =385 Which of the following did you book or buy for your trip? Base: All Travelers n=1000; Memory Makers n=385 Which of the below best describes your usage of Influencers as a source of information during the research and planning of your most recent trip? Base: All Travelers n=1000; Memory Makers n=385 Thinking about your next trips, how would you describe the type of trips they will be? Base: All Travelers n=1000; Memory Makers n=385 Source: Google x Kantar India Travel 2025 Google/Kantar, India travelers study, 2025, n=357 online adults aged 18+ in India who took a domestic or an international trip in the past year, used information from influencers when planning for their trips, and describe their trips as set-jetting trip, sports trip or music trip, fieldwork completed 11-17 April 2025. Google/Kantar, India travelers study, 2024, n=385 online adults aged 18+ in India who took a domestic or an international trip in the past year and described their trips as a set-jetting trip, sports trip, or a music trip.

Globe Trotters

Profile: Predominant cohort: Millennials or Metro dwellers

Who They Are & Where They Go

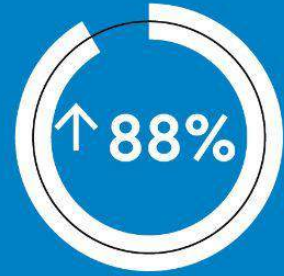
- **83%** are primary decision-makers, **70%** are primary planners, and **59%** self-fund their international trips.
- **59%** of international trips last a week or more.
- Primary Companions are **Spouse/partner** (62% vs 53% domestic)

How They Plan & Are Influenced

- Go through extensive research and planning process and take **more than a week** (56% vs 44% for domestic)
- **48%** have high reliance on creators, and **63%** find them very influential for inspiration.

Why & How They Travel

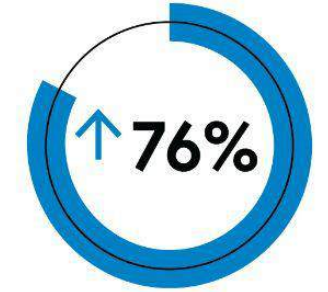
- Seeking **Moments of Luxury**: Cost is less of a consideration (61%), expect to splurge on holiday (88%), Prefer business class travel (50%) and luxury accommodation (59%) and Enjoy luxury shopping (41%)
- Prioritize broadening worldviews and distinguishing themselves. They indulge in **extreme sports** (34%) and **spa visits** (32%).
- Appreciate and **would pay a premium for personalized services** and private staff in accommodations.



Among travelers who took an international trip in the past year, said they used YouTube when looking for information from creators on travel.



Among travelers who took an international trip in the past year, said YouTube is the top source for travel inspiration



Globe Trotters plan to take an international trip this year (vs 48% domestic)



SOURCE:Google x Kantar India Travel 2025 Thinking about your travelling preferences in general, please select which of the below most applies to you. Base: Globe Trotters n=495; Domestic n=505 S4. Generally, what role do you have in making decisions about your trips? B8. what best describes your role in the decision making and planning process? B10. what best describes your payment contribution? Base: International Travelers n=495 Thinking back to your most recent (#1.S5_HIDDEN) trip, how long was the duration of the trip itself? Base: International Travelers n=495 Still thinking back to your most recent (#1.S5_HIDDEN) trip, who did you travel with? Base: International Travelers n=495 How much time passed between the point when you started to explore/research your trip and when you finally booked it? Base: International Travelers n=495 Are you planning on taking any of the below this year?Base: Globe Trotters n=495; Domestic n=505 Which of the below best describes your usage of influencers as a source of information during the research and planning of your most recent trip? Base: Globe Trotters n=495; Domestic n=505 14. How influential were influencers when getting inspiration for your latest trip? Base: Globe Trotters n=452; Domestic n=431 15. What platforms did you use when looking for information from influencers when researching your last trip? Base: Globe Trotters n=452; Domestic n=431 What sort of activities did you do? Base: Globe Trotters n=495; Domestic n=50= Thinking about your travelling preferences in general, please select which of the below most applies to you. Please select one option for each pair. Base: International Travelers n=495 B1. Thinking back to your most recent <PIPE S9b: domestic or international> trip, what were the main motivations of your travel? Base: International Travelers n=495Please imagine you are looking to book accommodation for a holiday. Please look at the below options and tell us what you'd be willing to pay a premium for? Base: International Travelers n=495Source:Google x Kantar India Travel 2025 Google/Kantar, India travelers study, 2024, n=452 online adults aged 18+ in India who took an international trip in the past year and used information from influencers when planning for their trips. Google/Kantar, India travelers study, 2024, n=495 online adults aged 18+ in India who took an international trip in the past year.



Novice Travelers

Profile: Predominant cohort: **Gen Z and female**

Who They Are & Their Travel Initiation

- **67%** are travelling, paying, or planning a trip for the **first time**
- Prefer taking **shorter trips** (4-6 nights - 31%) and prefer **travelling with friends** (33%)
- **2X** more likely to travel for **educational purpose** like learning a new language, cooking and experience driven travel
- Over-index on **surprise (mystery) trips** (+11%) and trips to nurture self or others like **wellness** (+8%).



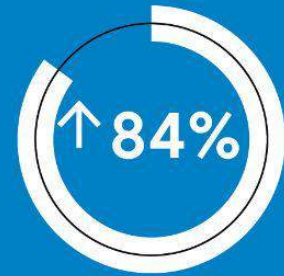
How They Plan & Engage

- 1 in 3 book within 24 hours (38%), but 44% find planning overwhelming.
- **YouTube** is the top source (67%). **High reliance on creators** (48%) and find them very influential for inspiration (62%)
- **Prefer package holidays (62%)**
- Research in **more languages, particularly Hindi (+15% vs seasoned).**

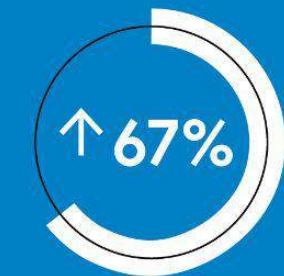


Spending & Future Outlook

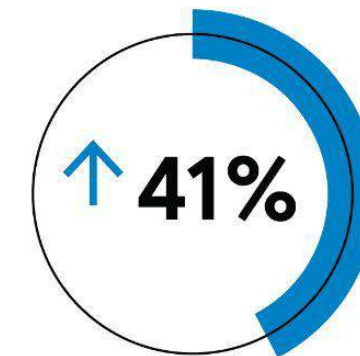
- **Cost conscious** (70% vs 59%). **57% spend "below average"** on international travel.
- **Savvy with Discounts** and make greater use of points, vouchers and discounts
- Plan to take a **nostalgia trip** (38%) in the next year, and willing to **pay a premium for airline loyalty programs** (10%).
- **70% travel to fit current trends** and **27% prefer "moment-cations"** (shorter trips around events like concerts, sports, shows). Work trips also act as catalysts.



Among travelers who reported it was their first time traveling, planning a trip, or paying for a trip, used YouTube when looking for information from creators on travel.



Among travelers who reported it was their first time traveling, planning a trip, or paying for a trip, surveyed respondents said YouTube is the top source for travel inspiration



Plan to take a road trip in the next year (vs 27% seasoned travelers)

SOURCE: Google x Kantar India Travel 2025 B9. Which statements below best describes your (#\S5_HIDDEN) trip? Base: Novice Travelers n=673; Seasoned Travelers n=327; Gen Z = 471; Men = 499; Women = 498; B6. Thinking back to your most recent (#\S5_HIDDEN) trip, how long was the duration of the trip itself? Base: Novice Travelers n=673 B7. Still thinking back to your most recent (#\S5_HIDDEN) trip, who did you travel with? Base: Novice Travelers n=673 B4. What sort of activities did you do? Base: Novice Travelers n=673; Seasoned Travelers n=327 How would you describe the type of trip you took? Base: Novice Travelers n=673; Seasoned Travelers n=327 How much time passed between the point when you started to explore/research your trip and when you finally booked it? Base: Novice Travelers n=673; Seasoned Travelers n=327 Thinking about your travelling preferences in general, please select which of the below most applies to you. Please select one option for each pair. Base: Novice Travelers n=673; Novice Traveler; First time = 272, Seasoned Travelers n=327 Which of the below best describes your usage of influencers as a source of information during the research and planning of your most recent trip? Base: Novice Travelers n=673 I4. How influential were influencers when getting inspiration for your latest trip? Base: Novice Travelers n=620 I5. What platforms did you use when looking for information from influencers when researching? Base: Novice Travelers n=620 L1. When looking for information when planning trips, what language do you typically search in? Base: Novice Travelers n=673; Seasoned Travelers n=327 Thinking about your travelling preferences in general, please select which of the below most applies to you. Please select one option for each pair. Base: Novice Travelers n=673; Seasoned Travelers n=327 How much did you spend on your last trip? Base: Novice Travelers, International n=350; Base: Novice Travelers, Domestic n=323 Thinking about your next trips, how would you describe the type of trips they will be? Base: Novice Travelers n=652; Seasoned Travelers n=319 Please imagine you are looking to book accommodation for a holiday. Please look at the below options and tell us what you'd be willing to pay a premium for? Base: Novice Travelers n=673 A1. Thinking about your travelling preferences in general, please select which of the below most applies to you A13. Planned trips per year Base: Novice Travelers n=673 Source: Google x Kantar India Travel 2025 Google/Kantar, India travelers study, 2024, n=620 online adults aged 18+ in India who took a domestic or an international trip in the past year which was their first time travelling or paying for a trip or planning a trip, and used information from influencers when planning for their trips. Google/Kantar, India travelers study, 2024, n=673 online adults aged 18+ in India who took a domestic or an international trip in the past year which was their first time travelling or paying for a trip or planning a trip.



Religious Pilgrims

Profile: Predominant cohort: **All ages and genders** participate, with a slight skew towards those over 30

Who They Are & What Drives Them

- **44% of travelers** went on a religious trip to a spiritual destination.
- **Core Motivations** include **personal interests** (+9%), **reuniting with family/friends** (+9%), and **worldview expansion** (+8%).
- Travel with **more people, particularly friends and family**
- Often prefer **shorter trips** (4-6 nights). Extended trips (11+ days) are also fairly common

Digital Influence

- **62% found creators very influential** in their research particularly **information on key activities** (49%), **videos/images of destinations** (45%), and **destinations to visit** (44%).

Planning, Spending & Preferences

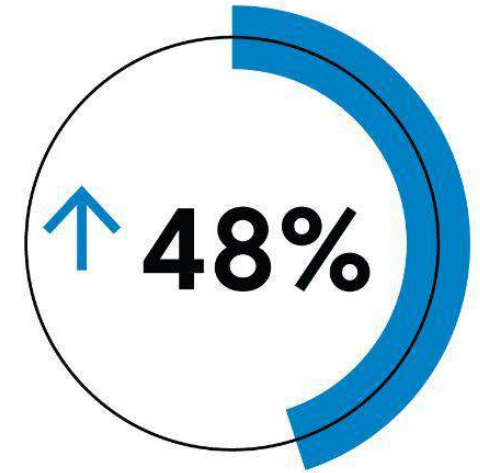
- **Economy-Focused** & Prefer budget-friendly accommodation.
- Insist on high levels of **cleanliness, safety, security,** and **customer service.**
- More likely to buy **add-on services, especially around transportation** like car rentals (+6%), rail tickets (+9%), and bus tickets (+8%).
- Research in a **more diverse range of languages (Hindi, Tamil, Marathi)** than the average



Of surveyed travelers who took a religious trip or engaged in religious activities on their most recent trip, said they used YouTube when looking for information from creators on travel.



Of surveyed travelers who took a religious trip or engaged in religious activities on their most recent trip, said YouTube is the top source for travel inspiration



interested in cultural and heritage experiences and further immersion



Thinking back to your most recent (HIDDEN) trip, how would you describe the type of trip you took? Base: Religious Pilgrims = 435; B1. Thinking back to your most recent (PIPE S9b: domestic or international) trip, what were the main motivations of your travel? Base: Religious Pilgrims = 435; All Travelers n 1,000 Still thinking back to your most recent (HIDDEN) trip, who did you travel with? Base: Religious Pilgrims = 435; All Travelers n 1,000 C4. Which of the following did you book or buy for your trip? Base: Religious Pilgrims = 435; All Travelers n 1,000 L1. When looking for information when planning trips, what language do you typically search in? Base: Religious Pilgrims n=435; All Travelers n 1,000 Thinking about your next trips, how would you describe the type of trips they will be? Base: Religious Pilgrims n=423; All Travelers n 1,000 I4. How influential were Influencers when getting inspiration for your latest trip? Base: Influencer Users n=39713. What types of information were you looking for from Influencers when researching your trip? Base: Influencer Users n=39715. What platforms did you use when looking for information from Influencers when researching? Base: Influencer Users n=397 Source: Google x Kantar India Travel 2025 Google/Kantar, India travellers study, 2024, n=435 online adults aged 18+ in India who took a domestic or an international trip in the past year and defined their trips as a religious trip type or partook in religious activities in their trips. Google/Kantar, India travellers study, 2024, n=397 online adults aged 18+ in India who took a domestic or an international trip in the past year, used information from influencers when planning for their trips, and defined their trips as a religious trip type or partook in religious activities in their trips.



5. Destinations Unpacked





Travel is soaring

Travel enthusiasm and confidence has risen hugely in the past few years, with the uncertainty of the pandemic now a fading memory. Providers need to take advantage of this rising interest in travel.



Keen to travel as much as possible



International interest is high

Indian travelers are happy to travel far and wide to fulfill their travel dreams - Australia, Canada and Singapore top the list of favoured global destinations; Germany, Japan and the US also feature.

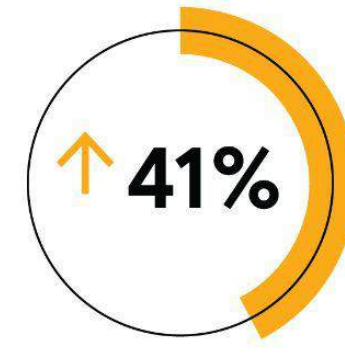


Prefer to travel internationally

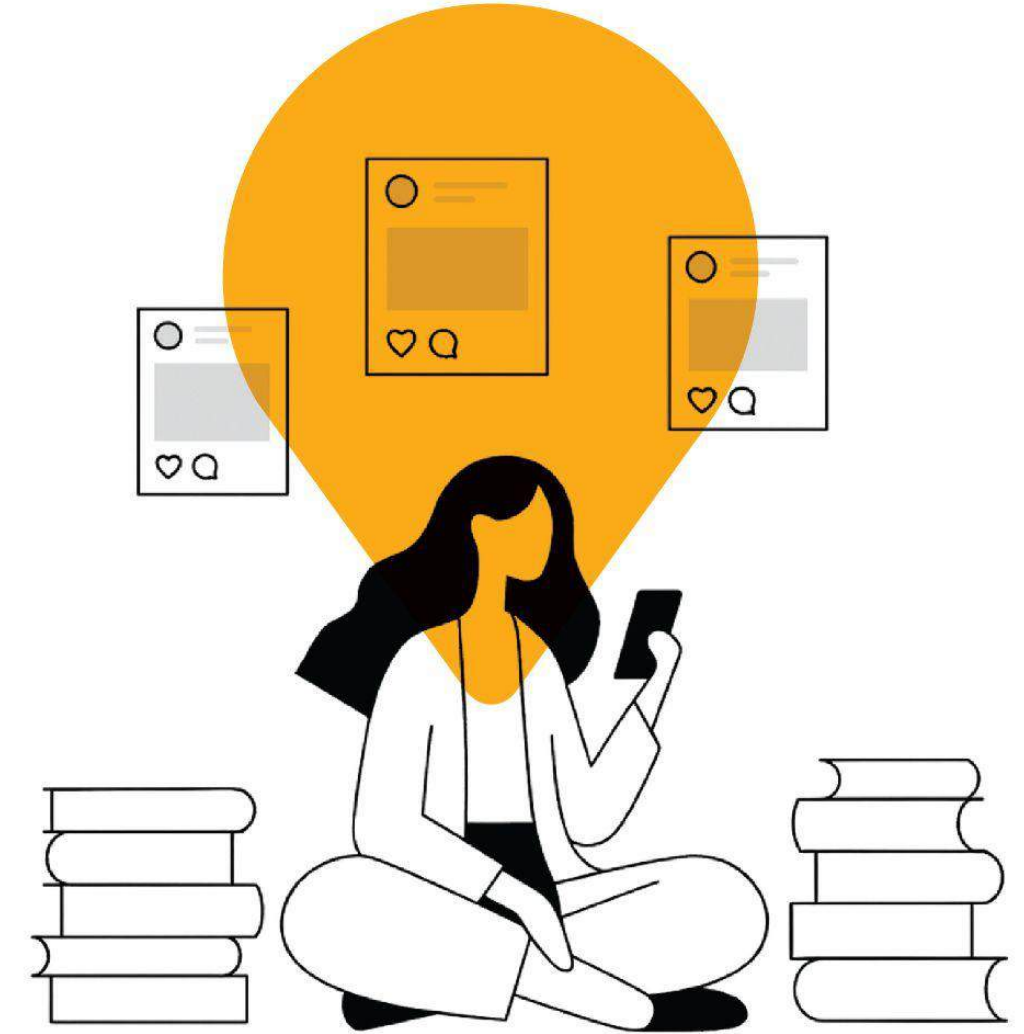


Domestic is booming

While international travel is sky high, so is the domestic market - Indian travelers are keen to explore and enjoy 'their own backyard', especially to soak up the rich offerings of Mumbai, Agra and Jaipur.

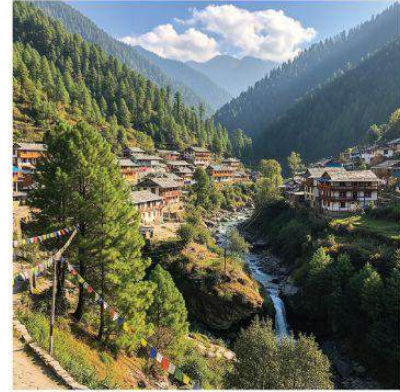


Prefer to travel domestically

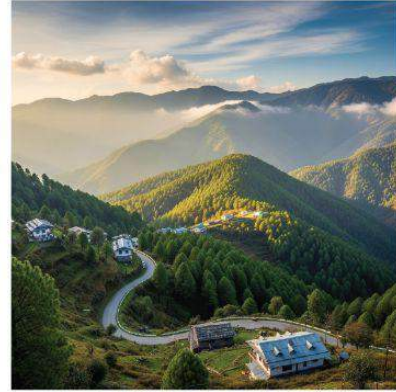


SOURCE: Google x Kantar India Travel 2025 Question: Thinking about your traveling preferences in general, please select which of the below most applies to you. Base: All Travelers n=1,000 Source: Google x Kantar India Travel 2025 Question: B5 Locations of Trip Base: International Travelers = 495 Question: Thinking about your travelling preferences in general, please select which of the below most applies to you. Base: All Travelers = 1,000; Millennials = 445; Metro = 539 Source: Google x Kantar India Travel 2025 Question: B6 Locations of Trip Base: Domestic Travelers = 505; Question: Thinking about your traveling preferences in general, please select which of the below most applies to you. Base: All Travelers = 1,000

A powerful new wave of purpose-driven travel is reshaping the domestic travel landscape



Jibhi, 53% YoY



Chakrata, 36% YoY



Thiruchendur, 32% YoY



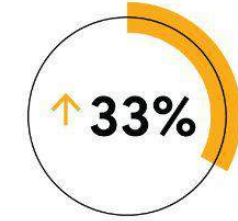
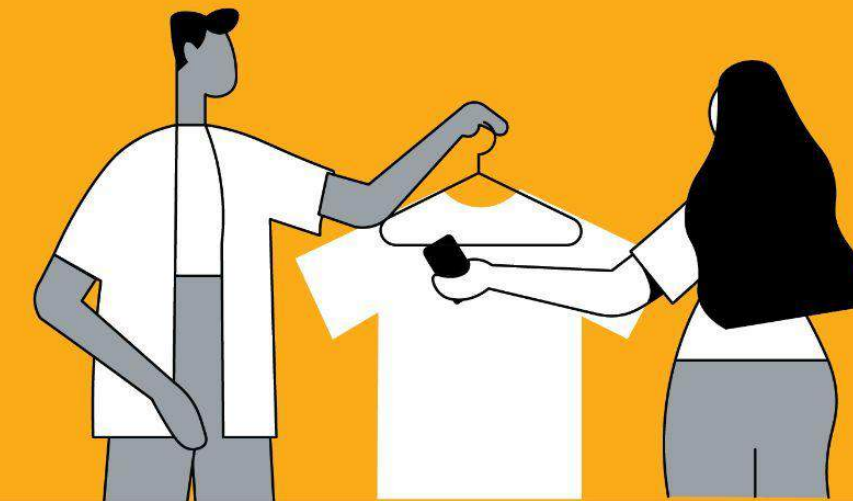
Lansdowne, 22% YoY



Domestic Travelers are now prioritizing comfort and luxury over cost

71,850 INR

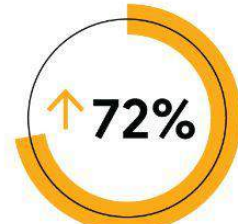
Average spend on a domestic trip



Prefer **business class travel** over economy



Prefer **luxury accommodation** over budget



Cost is less of a consideration



Expect to **splurge** on holiday

SOURCE: Google x Kantar India Travel 2025 How much did you spend on your last trip? Base: Globe Trotters n=495; Domestic n=505 Thinking about your traveling preferences in general, please select which of the below most applies to you. Please select one option for each pair. Base: International Travelers n=495, Domestic n=505 Destination YoY growth: Google Internal Data

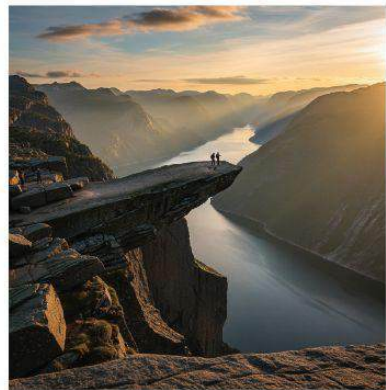
Indian Travelers are seeking out new horizons and unique experiences beyond traditional hotspots



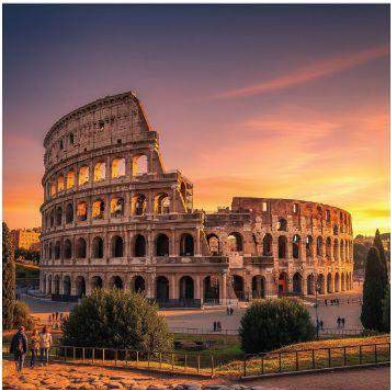
Luxembourg, 138% YoY



Taiwan, 42 % YoY



Norway, 36% YoY



Italy, 22% YoY



International travelers **less cost conscious** and will splurge on holiday especially when compared to domestic trips

3.2X

average spend on last **international** trip compared to average spend on a domestic trip

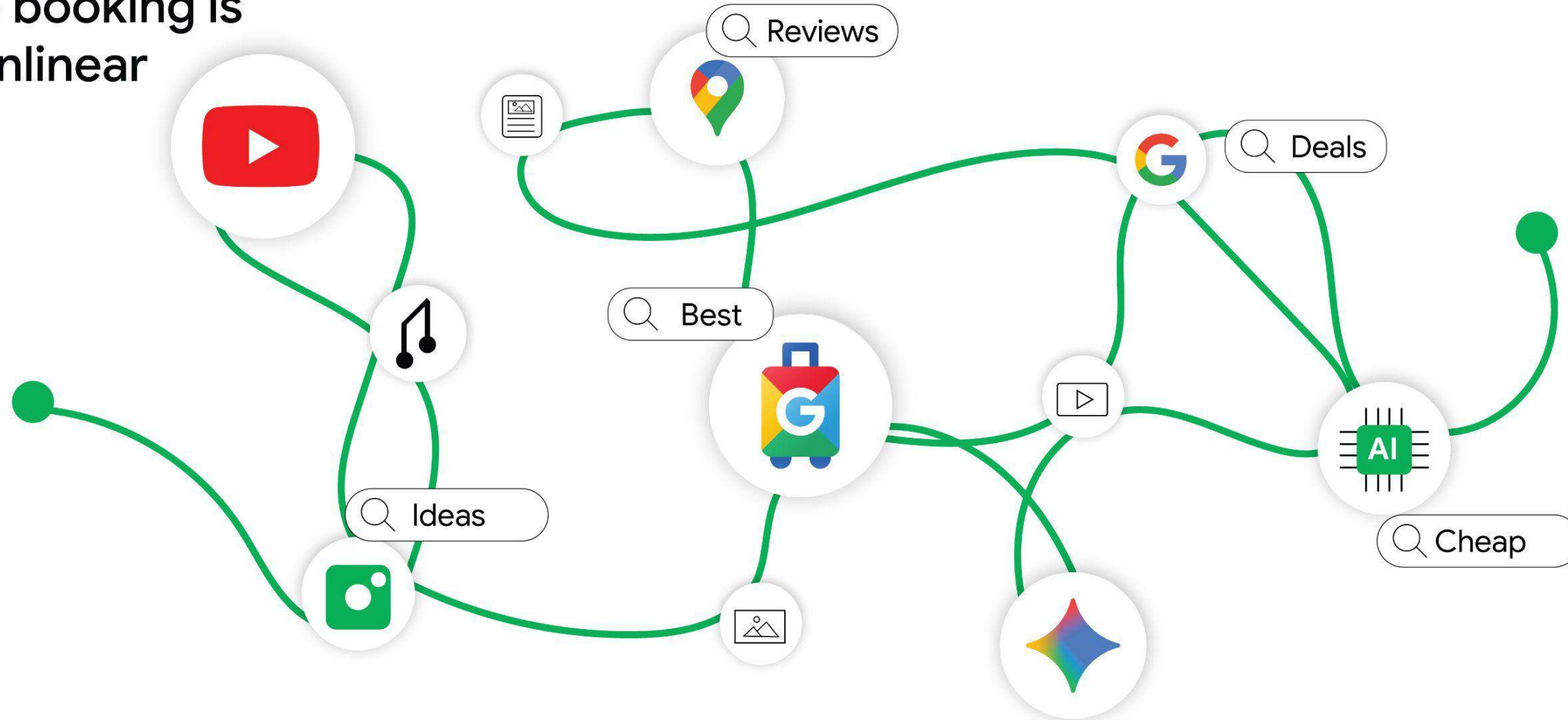
SOURCE: Google x Kantar India Travel 2025 How much did you spend on your last trip? Base: Globe Trotters n=495; Domestic n=505 Thought starters: There may be several factors driving this: International travel is opening up for the rising middle class, wealth is evolving. Scarcity bias or 'last chance' travel - exacerbated by the covid pandemic and global, environmental change - means travelers want to make the most of their experiences while they still can. And the rise of influencers - promoting 'grammable' destinations and activities - can make the impossible seem attainable. Google Internal Data, FY 24 VS FY23 Destination YoY growth: Google Internal Data

5. Marketers Playbook

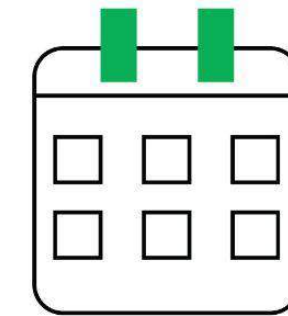


The new path to booking is complex and nonlinear

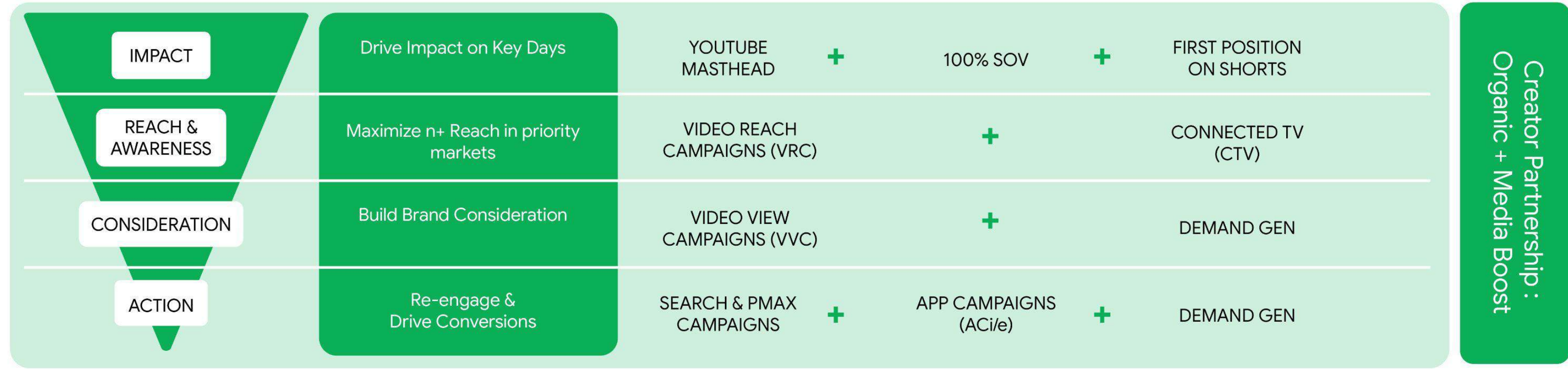
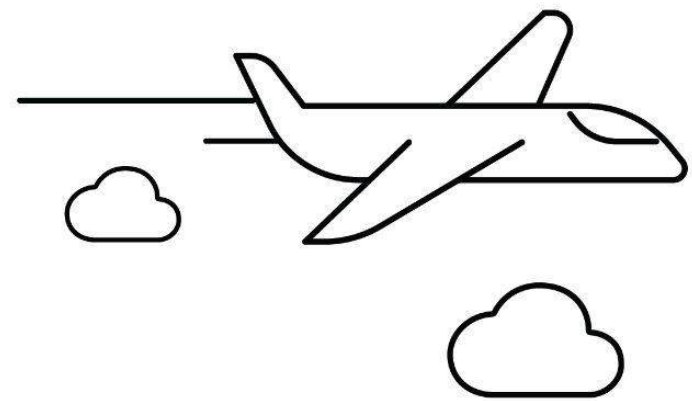

New Triggers
for Travelling



New booking
experiences



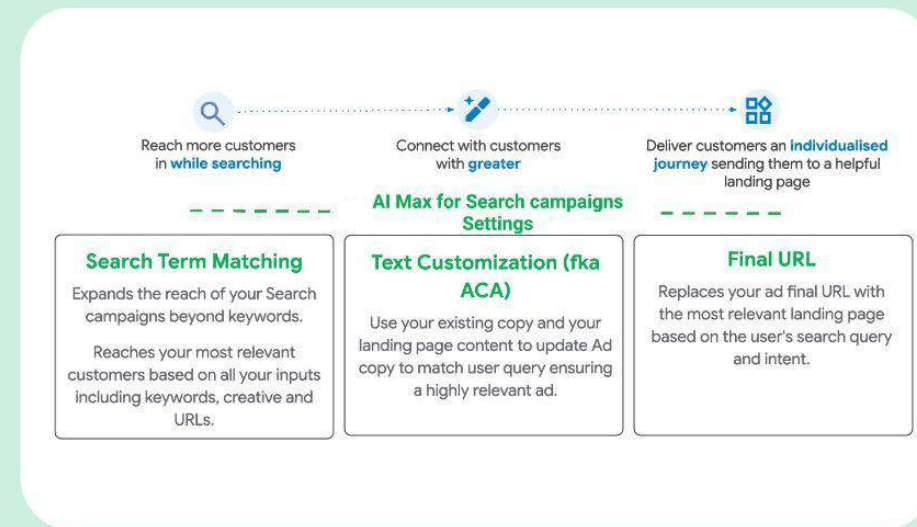
Google full funnel solutions help in driving conversions





Our products evolve as per the changing user behaviour

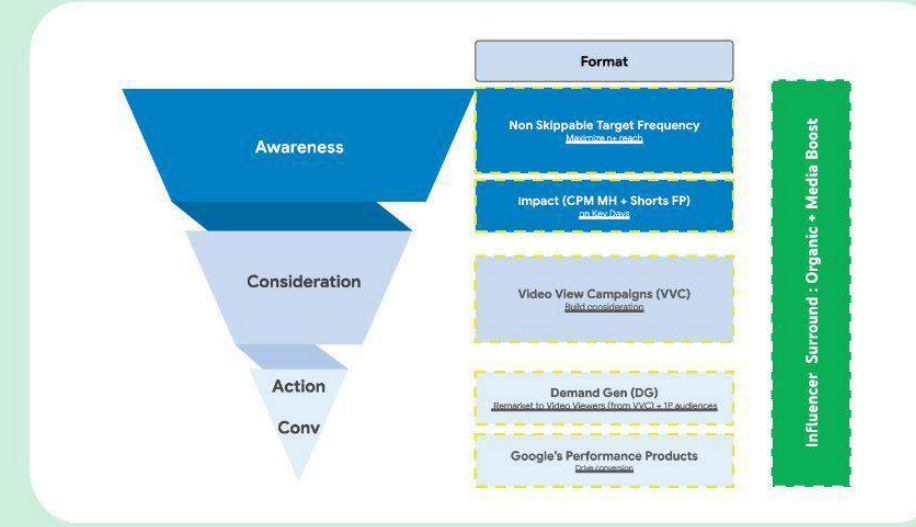
Search : AI Max



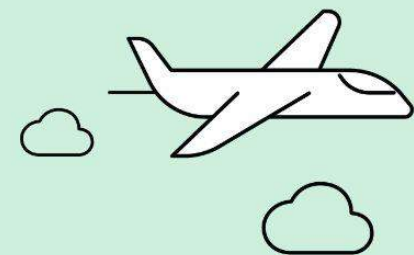
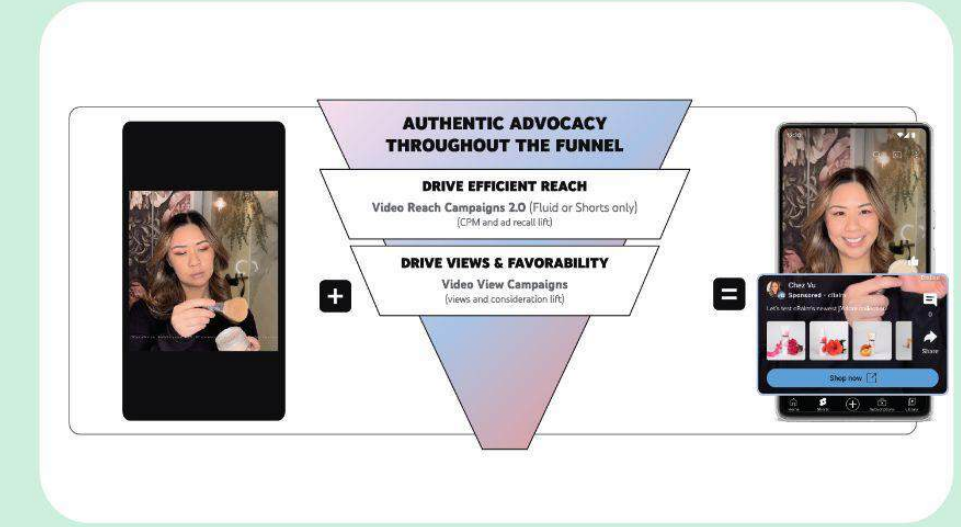
Apps : Integrated Conversion Measurement



Youtube: Full Funnel Brandstack



Creator : Partnership Ads



And they resonate with all types of travelers : Travel feeds to appeal from visual ‘Memory Makers’ to evolved ‘Globe Trotters’

Surface rich, visual content from your **travel feeds** into Search ads to drive awareness and consideration to your offerings



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Sleeps 4+ Sleeps 2+ Group Rentals 7+ Pets W

Google's AI provides marketers with control for your ads.

Controls To Cater Your Ads To Different Traveler Archetypes

 <p>Brand suitability controls</p>	 <p>Exclusion controls</p>	 <p>Audience signals</p>	 <p>Lifecycle goals</p>	 <p>Ways to expand your reach</p>	 <p>Feeds</p>	 <p>Controls for your creative assets</p>	 <p>Performance optimization options</p>
<ul style="list-style-type: none"> • Campaign and account-level negative keywords • Campaign-level brand exclusions • Content suitability settings 	<ul style="list-style-type: none"> • IP exclusions • Account-level Search Partner Network exclusions • Account-level placement exclusions • Age-based demographic exclusions (beta) • Device targeting 	<ul style="list-style-type: none"> • Your data (customer lists, remarketing audiences, etc.) • Affinity audiences • In-market audiences 	<ul style="list-style-type: none"> • New customer acquisition goal • New customer value mode • New customer only mode • High value new customer mode • Retention goal 	<ul style="list-style-type: none"> • Final URL expansion • Page feeds • URL contains rules • Search themes 	<ul style="list-style-type: none"> • Google My Business • Google Merchant Center • Dynamic Ads feed • Business data feeds • Vehicle feeds • Hotel properties feeds 	<ul style="list-style-type: none"> • Automatically created assets • Automatically enhanced assets • Brand guidelines 	<ul style="list-style-type: none"> • Seasonality adjustments • A/B testing

And deliver creative personalization at scale

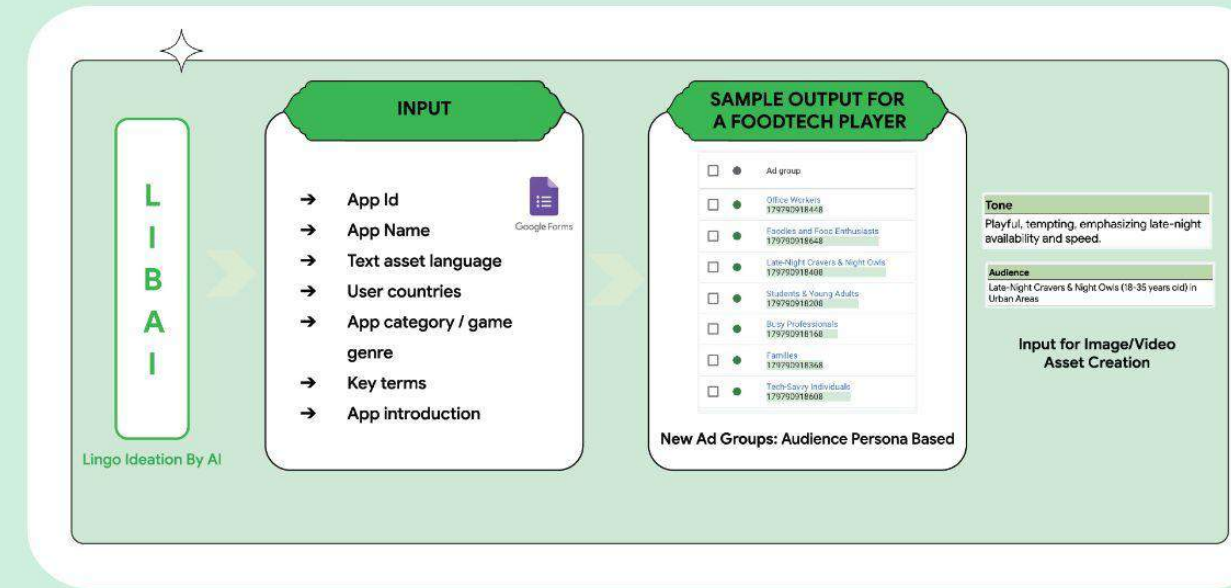
Nano Banana/Gemini 2.5: Generate image ads



Veo3 : Generate video ads



LIBAI : Generate text ads





6. Acknowledgment

This research could not have been possible without the strong support from Kantar, Google Insights Team, Google Marketing Team and Large Customer Sales Travel vertical of Google India. This is an attempt to drive industry thought leadership and strong category understanding for the travel category which is one of the most exciting and flourishing categories. This comprehensive research project, vital to understanding the dynamic travel industry, was made possible through the invaluable collaboration and robust support of several key partners. We extend our sincere gratitude to Kantar for their insightful contributions, the Google Insights Team for providing data-driven consumer insights and their analytical prowess, the Google Marketing Team for their strategic guidance, and the Large Customer Sales Travel vertical of Google India for their dedicated support and industry expertise. Their collective efforts were instrumental in shaping this endeavor. This research is a significant attempt to foster industry thought leadership and cultivate a profound category understanding within the travel sector, which consistently proves to be one of the most exciting and rapidly flourishing categories in the global market.

For any feedback/input to this report please scan the QR code mentioned below.



Shaurab Kapadia

Head of Industry -
Travel & Foodtech,
Google India



Subhashini Gupta

Head of Strategy and Insights,
Google India



Feedback Form