

THE ECONOMIC TIMES



Bennett & Coleman

THE TIMES OF INDIA

The Economic Times Great Indian Traveller

February 2025



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■ ■ ■
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Foreword





Gajendra Singh Shekhawat

Minister of Culture and Minister of Tourism
Government of India

My heartfelt congratulations to The Times of India Group on bringing out The Economic Times Great Indian Traveller Report. This initiative is a commendable effort in capturing the evolving preferences, aspirations, and travel behaviours of our nation's explorers.

India stands as a beacon of youthful energy, with approximately 65% of our population under the age of 35. This dynamic demographic is fervently passionate about exploring the diverse landscapes and rich cultural heritage of our country and the world.

The Economic Times Great Indian Traveller Report captures the behavioural patterns, motivations, and expectations of travellers below 40 years and beyond, offering valuable insights into both domestic tourism and outbound travel trends.

Insights captured in this report are based on responses from over 5,000 travellers, 100+ key travel service providers, and 20 CEOs across tourism boards, and hospitality veterans, and provide a data-backed understanding of traveller choices and expectations.

Our nation's tourism sector is on a remarkable trajectory. Irrespective of their age, our citizens' growing enthusiasm for discovering the cultural heritage of India is remarkable. Also, their zeal to explore the world has been growing quite significantly.

As the world witnesses a new era of tourism, it is heartening to see Indian travellers embracing unique experiences, seeking sustainable tourism, and contributing significantly to the global travel industry. We anticipate that tourism's contribution to India's economy will rise significantly with each passing year, surpassing the global average in the near future. Strategic investments, infrastructure development, and the unwavering support of industry stakeholders will drive this growth.

I commend The Times of India Group for spearheading this pivotal survey. The insights garnered will undoubtedly serve as a cornerstone for policy formulation, industry strategies, and the continued elevation of India's tourism landscape. May this endeavour inspire more research, collaboration, and innovation in the travel industry, ensuring a brighter and more dynamic future for Indian tourism.



Foreword





Sivakumar Sundaram

CEO, Bennett Coleman and Company Limited



Investment in travel is an investment in yourself

Travel blogger Matthew Karsten couldn't have summed it better on how India views travel today. We would rather spend on experiences than on assets. We seek culture, heritage, and scout for soul enriching travel memories. The Indian traveller is the seeker-of knowledge, culture, spirituality and trade. History has proven this multiple times. Indians have and continue to travel to almost every corner of the globe to seek stories and experiences.

Moreover, contemporary India's dynamic and growing middle-class have only catapulted this, making it one of the most vibrant and in-demand travel markets in the world. The Indian travel industry was estimated at \$53 bn in 2023 and projected to grow to \$97 bn by 2030. From city life to wellness getaways, mega-events to cultural experiences, and culinary trails—the post-COVID Indian travel economy is determined to become one of the largest tourism and hospitality industries globally spurred by technological advancements, better connectivity, and increasing disposable incomes.

As India's largest and credible publication that defines and directs popular culture in the country, The Times of India's inaugural travel survey, along with Ernst & Young as our knowledge provider, attempts to objectively decode the spectrum of factors that influence how India indeed chooses to travel, especially in a post-COVID era. This report delves into the finer nuances of the Indian traveller—whether it's the growing mindfulness around carbon footprint, what truly counts for an unforgettable experience, and where and when they prefer to travel.

From trends that will define the future of Indian travel, to insights for stakeholders in the tourism industry to impactfully converse and convert the Indian traveller—this report is your guide to understand and engage with the ever-evolving Great Indian Traveller!



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1

Executive summary



In summary, 'The Great Indian Traveller'

The Indian travel industry is growing like never before. While the sector always had immense potential, it's only in the recent months that India is witnessing a substantial spike in travel and tourism. The Indian traveller is not just from its Tier I cities; Tier II and III cities are largely driving this trend. The new Indian traveller has emerged, equipped with the will, technology and spending potential to travel, both domestically and internationally. From immersing in local culture and heritage to exploring popular religious destinations, and beaches and mountains, the leisure traveller in India is on a travel 'high'. The sector is riding the wave of better connectivity and technology, enabling travellers to truly go beyond the usual.

Is travel growing?

- 57% Travel Service Providers (TSPs) saw increased bookings since 2022
- While travel has risen across the board, preferences for international destinations have increased, driven mostly by Tier I and Tier II cities
- Tier III respondents prefer domestic travel more
- Most young Indians travel with spouses and friends, while aged Indians preferred travelling with family
- Compared to 2022, average length of stay has increased by one day for domestic and niche travels and two days for international travel

Are Indians willing to spend more on it?

- 80% TSPs believe that travel budgets have increased since 2022, and 26% have observed an increase of more than 20%
- International travel budgets have increased the most, followed by niche travel
- 76% respondents had a budget below ₹50,000 per head for domestic travel while the median spend for international travel was above ₹100,000 per head
- International travel spends are approximately 4x that of domestic travel
- While Tier I respondents spent more, spending patterns indicate no significant difference between Tier I and Tier II markets
- Willingness to spend on premium travel increases with age
- Approximately two-thirds of total spend is towards air tickets and accommodation
- Budget hotels are preferred in international travel, vis a vis domestic travel
- 90% TSPs believe that "free" services are the biggest attractions for Indian travellers (e.g. sim cards, wi-fi, merchandise, etc.)

To travel or not to travel?

- 81% survey respondents prefer saving for holidays rather than buy a piece of jewellery
- 80% would rather go for a weekend getaway than enjoy a movie and luxury dining experience
- 65% would prefer three domestic trips to one international trip





Picture credits : Japleen Kaur
Location : Kashmir, India

How do Indians plan their travel?

- 69% travellers prefer to plan the trips themselves on aggregator platforms
- 28% bookings made via TSPs are within a month of the travel date
- Solo travellers have the shortest booking window while large groups usually take over three months
- 51% domestic travellers and 76% international travellers book flights more than a month in advance
- 66% domestic travellers and 64% international travellers book accommodations more than a month in advance
- Travellers prefer making reservations in advance as they grow older
- Inclusion of breakfast, free Wi-Fi and availability of family-friendly activities are the key hotel selection criteria
- 55% prefer connecting to local wi-fi connections than buying international roaming packs
- Forex cash and international credit cards are the most preferred payment options overseas

Where and when does India travel?

- Beaches, mountains and religious travel were the most popular travel experiences, while natural phenomena, cruises and wildlife feature in bucket lists
- Travellers are highly influenced by friends and family when choosing a destination across all age groups
- While younger travellers were influenced by social media, mature travellers preferred credible media sources while deciding their travel destinations
- Airline connectivity and ease of visa are the most important parameters to select a destination
- For travellers above 60 years, offers were the key deciding factor while for those between 40 and 60 years, school vacation schedules decided time of travel
- Work leave balance, celebrations and offers were the key factors determining the timing of travel for millennials

What are Indians' unique travel preferences?

- Local culture and heritage feature are the most important factors while choosing a destination
- Younger travellers under 40 years of age preferred outdoor adventures and activities more
- 75% TSPs believed that Indian travellers were willing to pay extra for out-of-the-box experiences
- 65% Indian travellers preferred to carry Indian food overseas





Age groups and their preferences



Planning

- Travel companions >
- Influencing factors (time of travel) >
- Influencing factors (choosing destination) >



Budget

- Average budget (₹ per person) >



Itinerary

- Preferential activities >



Reservations

- Booking preferences >
- Lead time >

Gen ACE
(Adventures, Celebrations, Explorations)

40 years and below

Prefer travelling with spouses and friends

Work leave balance

Celebrations

Social Media

Domestic

₹41k

International

₹164k

Outdoor / Adventure

Self-bookings via aggregators

Domestic

1 month

International

3 months

Gen LUX
(Luxury, Unique, Experiential)

41 years and above

Prefer multi-generational travel

Offers

Vacation schedule of kids

Credible media

Domestic

₹53k

International

₹211k

Heritage / Culture

Fixed packages or through direct suppliers

Domestic

1 month

International

3 months

Location : Hawaii, USA





2

The Indian travel sector



Location : Taj Mahal, India

The Indian travel sector is growing

US\$3 trillion

India's target to build tourism economy by 2047¹

US\$231 billion

- Direct contribution of tourism and hospitality industry to India's GDP in 2023
- India had the second highest tourism GDP contribution in Asia-Pacific²

39th rank

- India's rank among 119 countries on the World Economic Forum's Travel and Tourism Development Index 2024 has improved from 54th position in 2021³

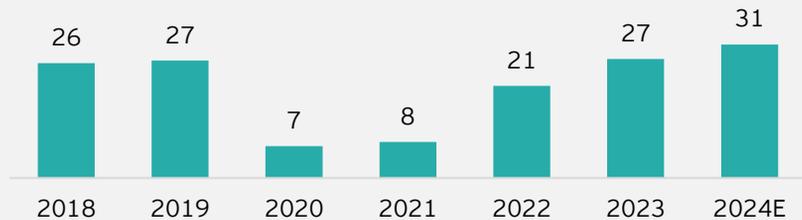
#5 outbound market

Largest outbound market by 2027 from 10th largest outbound market in 2019 as per Bernstein⁴

27 million overseas departures

- Indian National Departures (overseas) in 2023; YTD Aug 2024 at 20 million⁵

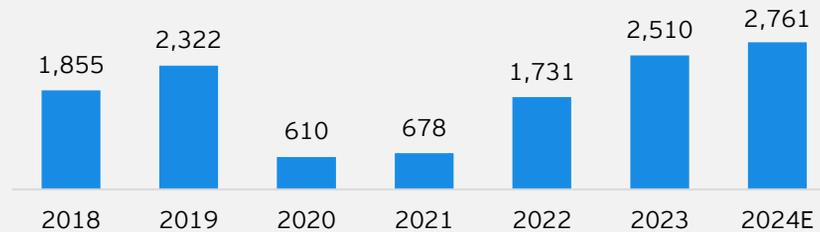
Indian national departures (in million)



2.5 billion domestic tourists

- Domestic tourist visits in 2023⁵

Domestic tourist visits (in million)



42 million jobs in India

- Employment in travel and tourism grew by 10%, and is 8% more than it was in 2019⁶

Travel infrastructure

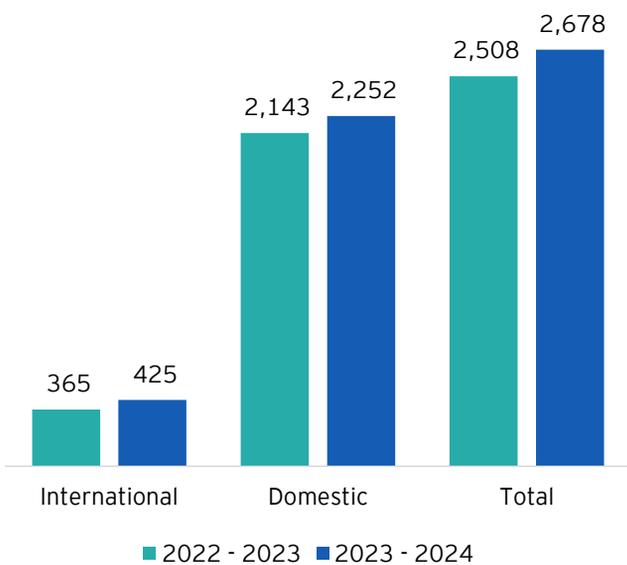
Enabler	2024	2047E
National Highways ⁷	1.46lakh kms	> 2Lakh kms
Operational airports ⁸	157	350
Vande Bharat trains ⁹	136	350



Air statistics : Airport Authority of India (AAI)

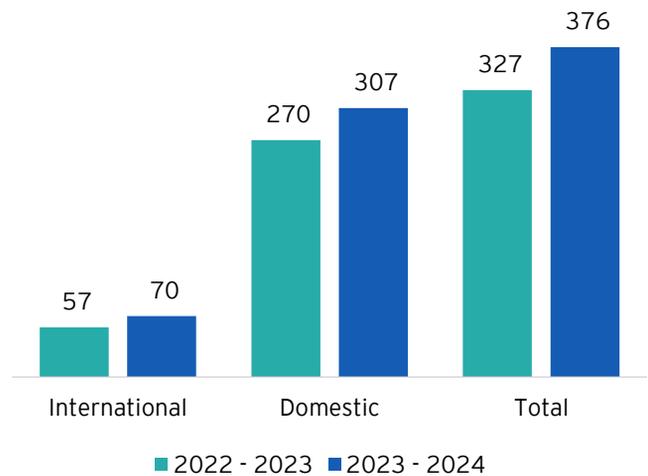
6.7% increase in total aircraft movement with 16.5% increase in international aircrafts¹⁰

Aircraft movements in '000



15% increase in total passenger movement with 22% increase in international air passenger traffic¹⁰. The current 376 million is projected to cross 3 billion passengers by 2047¹¹

Passenger movements (in million)



Visa application trend : VFS Global

Growth in visa applications from India

+11%

YTD Nov 2023 v/s YTD Nov 2024

+4%

YTD Nov 2019 v/s YTD Nov 2024

Adoption of 'Visa At Your Doorstep' service

+20%

YTD Nov 2023 v/s YTD Nov 2024

6x

YTD Nov 2019 v/s YTD Nov 2024



Yummi Talwar
COO, South Asia, VFS Global



We have observed extended peak seasons for international travel owing to the pent-up desire to travel. Most essentially there has been a significant shift in travellers' preference for personalised and technology-led solutions for seamless experiences.





Preferred travel destinations among 'The Great Indian Traveller'





United Kingdom

Germany

UAE

Kuwait

Saudi Arabia

Thailand

Singapore

Indonesia

Source: EY aggregation of top destinations basis secondary resources across 2024



3

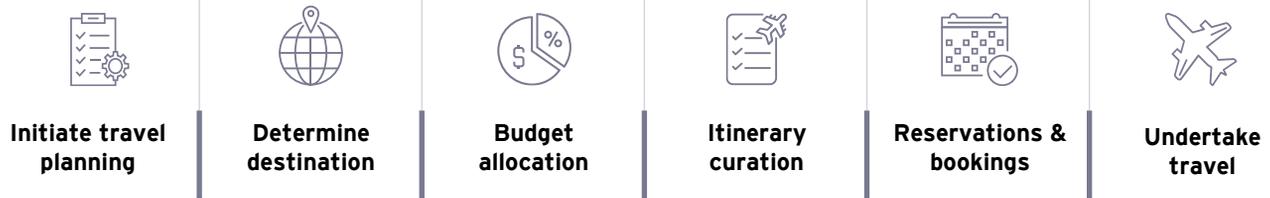
Detailed survey findings



Setting the context

To understand the nuances of Indian travellers, we conducted a pan India online survey of travellers as well as travel service providers (TSPs), apart from personal meetings with several industry experts during November-December 2024.

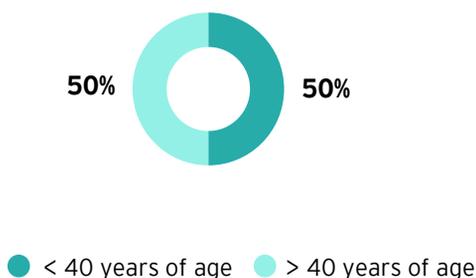
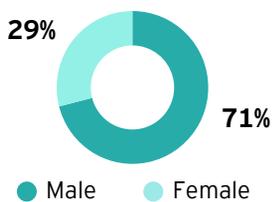
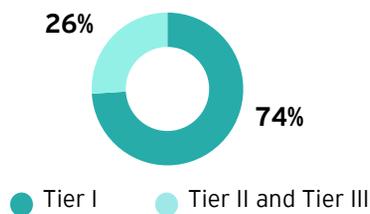
This section summarises the findings of the above surveys in the following areas



Survey respondent profile

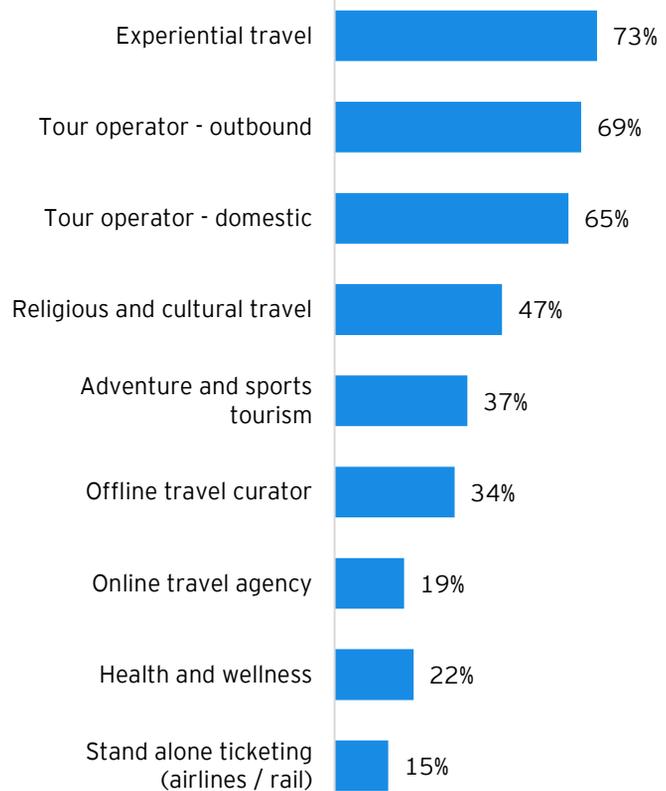
Travellers

29 States including UTs



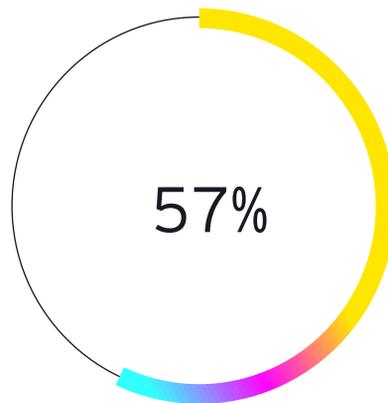
Travel service providers

Q: Which of the following is applicable to your business?





Initiate travel planning

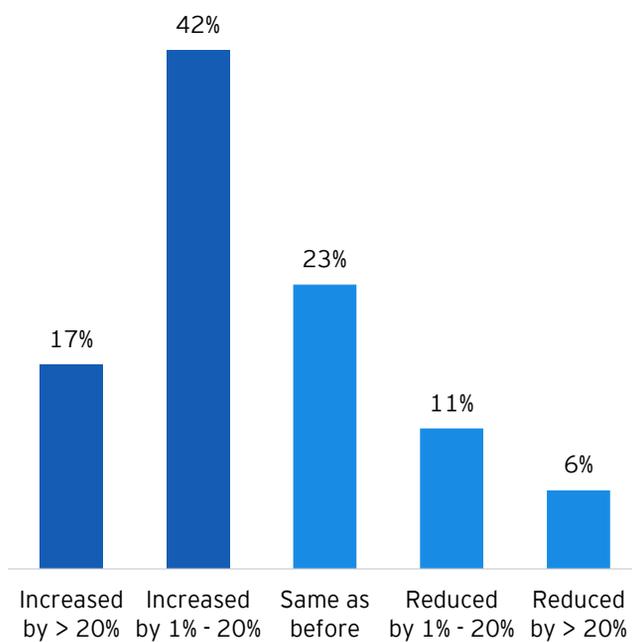


TSPs saw increased bookings since 2022

Individual package bookings increased for **66%** of TSPs, while group bookings reduced for **29%**



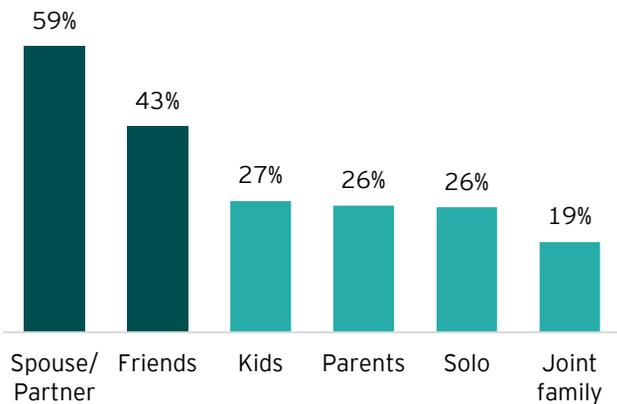
Q: What trends have you observed in total bookings since 2022?



Survey of travel service providers

Most travellers travel with spouses and friends

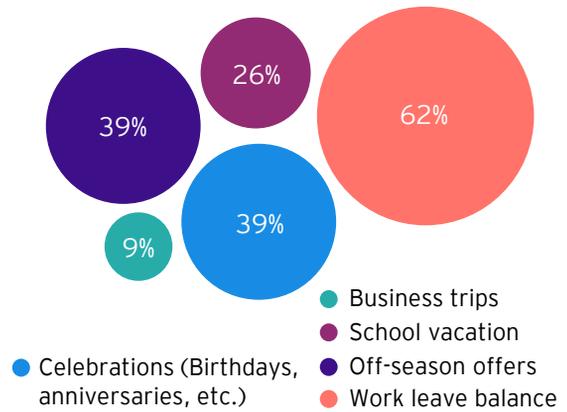
Q: Who do you usually travel with for leisure?



Survey of travellers

Work leave balance, celebrations and offers were the key factors determining the timing of travel

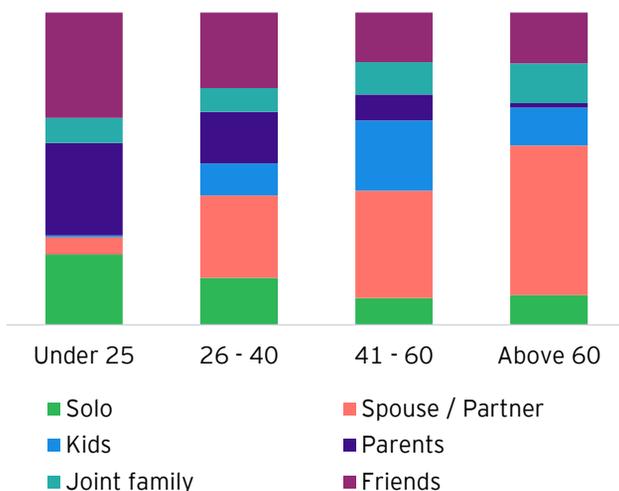
Q: What factors determine the timing of your holiday?



Survey of travellers

But as travellers age, more travel with family and less with friends

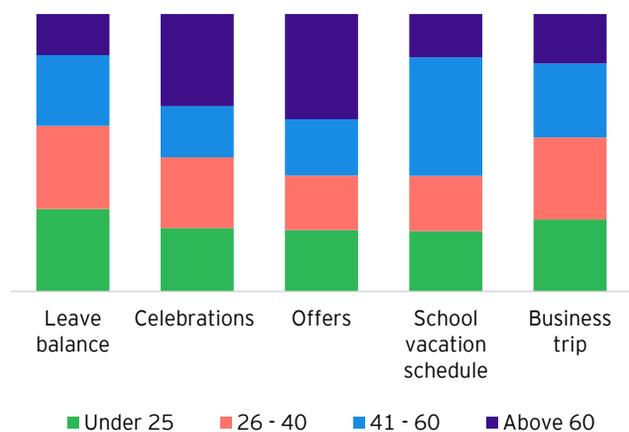
Q: Who do you usually travel with for leisure? (grouped age wise)



Survey of travellers

For travellers above 60 years of age, offers mattered the most; for 40-60 year olds, it was the school vacation schedule

Q: What factors determine the timing of your holiday?



Survey of travellers



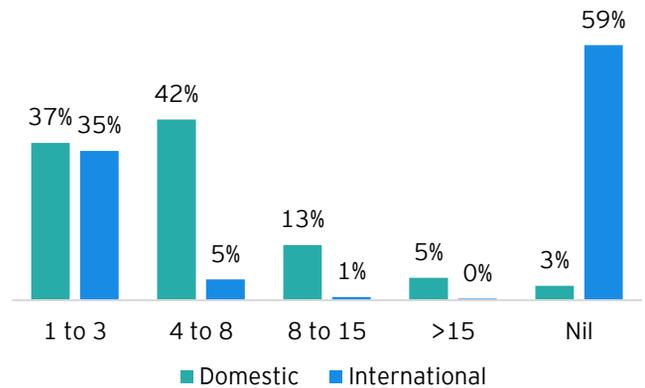


Determine destination

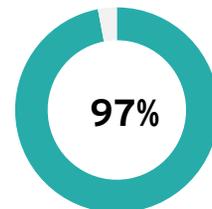


Respondents had taken an average of six domestic and one international trip since 2022

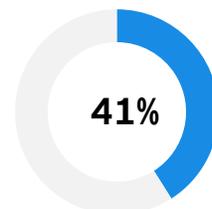
Q: How many vacations / trips have you taken since 2022 (including staycations)?



Survey of travellers



respondents were domestic travellers while



had travelled overseas since 2022

Frequency of domestic travel was similar for Tier I and Tier II travellers. However, Tier II respondents travelled less internationally



Fred Dixon
CEO, Brand USA



There is a 24% growth in visits to the U.S. last year alone, which highlights the influence of Indian travellers. Whether travelling for leisure—seeking immersive experiences, iconic attractions, or unique culinary journeys, or for business, forging international connections and driving collaboration, they represent a dynamic force representing India's growing economy.



Fahd Hamidaddin
CEO, Saudi Tourism Authority



The Great Indian Traveller is family-oriented, culturally curious, adventurous, and celebrated for their love of iconic experiences and passion for social storytelling.



Phillipa Harrison
MD, Tourism Australia



We are now welcoming around 430,000 Indian travellers a year who contribute about AU\$2.3 billion to our economy. Visitation to Australia from India is currently 108% of what we experienced in 2019! This increase is partly being driven by improved aviation links between our two countries, with the number of flights per week increasing and taking seat capacity to 333% of pre-pandemic levels.



John Pagano
CEO, Red Sea Global



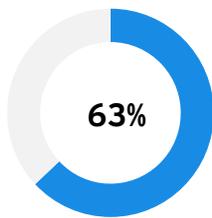
Post-pandemic, travellers are seeking transformative experiences that prioritise sustainability. They are looking for experiences that allow them to indulge in luxury and see the wonders of our world while minimising environmental footprint. In tandem with this trend is also a greater emphasis on wellness, highlighting the importance of physical and mental well-being.

Location : Mount Everest, Asia

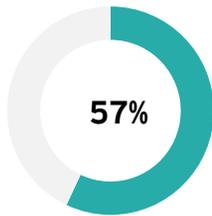


While all types of travel saw increased bookings, TSPs indicate that there was a clear shift towards international destinations in recent period

Percentage of TSPs who believed that demand had increased since 2022

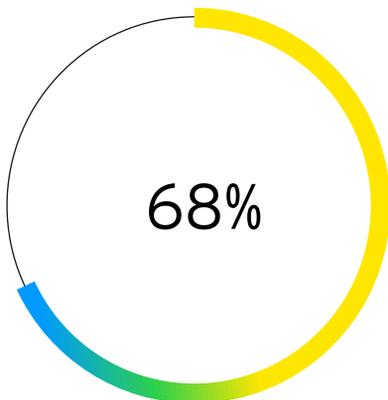


International bookings



Domestic bookings

Survey of travel service providers



TSPs believed that the demand for outbound travel had increased post-pandemic



Daniel D'souza
Co-founder, DreamSetGo



Seven out of ten travellers today wish to combine their holiday with unique and immersive experiences. This could range from bucket list moments at live events or being part of the local food and culture, which are influenced largely by what they discover digitally.





Varun Chadha
CEO, TIRUN (Royal Caribbean Cruises)

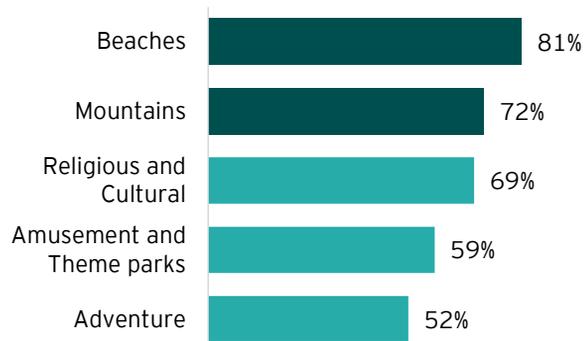


Indian travellers are willing to pay a premium for new/novel experiences, whether it be cruising on large cruise ships, visiting private islands in the Bahamas, or visiting Antarctica on an expedition voyage with no compromise on luxury.



Beaches, mountains, religious and cultural travel were the most popular travel experiences

Q: What kind of travel experiences have you experienced?

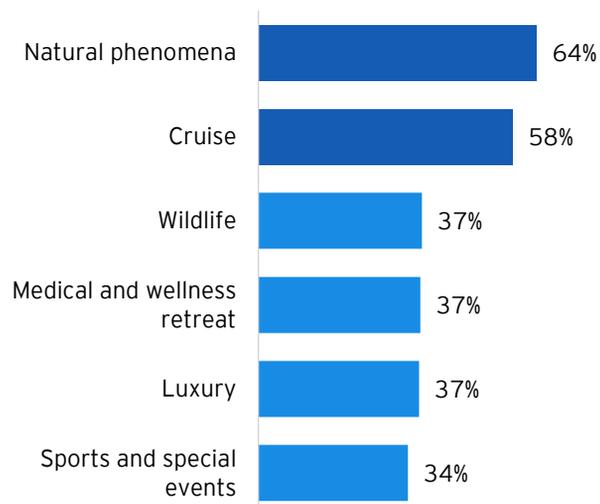


Survey of travellers



Natural phenomena, cruises and wildlife were on most respondents' bucket lists irrespective of age

Q: What kind of travel experiences are on your bucket list?



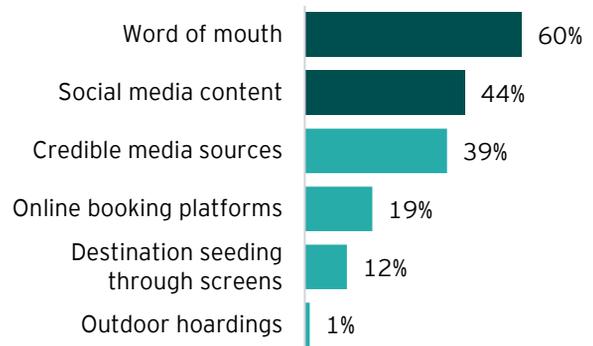
Survey of travellers





Travellers are highly influenced by friends and family to choose the destination irrespective of their age

Q: When choosing your next travel destination, which sources influence your decision? (Top 2)

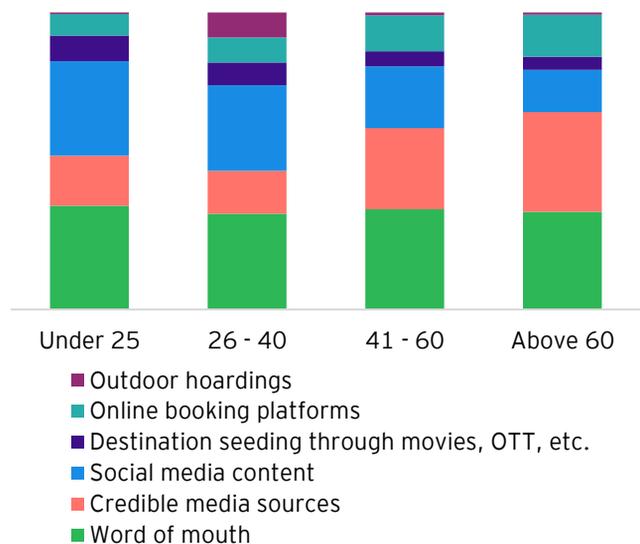


Survey of travellers



Mature travellers still prefer credible media sources while choosing their travel destination

Q: When choosing your next travel destination, which sources influence your decision? (Top 2)



Survey of travellers



Issam Kazim

CEO, Dubai Corporation for Tourism and Commerce Marketing (DCTCM)



Trends in our sector are always evolving, and at the moment slow travel, sustainability, and meaningful, experiential tourism are at the forefront, with travellers seeking deeper cultural connections and ways to positively impact the environment.



Martin Nydegger

CEO, Switzerland Tourism



Indian travellers are increasingly looking for unique adventures, from paragliding to first-time ski experiences. Their above-average daily expenditure, longer stays in luxury accommodations and interest in new experiences highlight India's increasing importance for Switzerland Tourism.

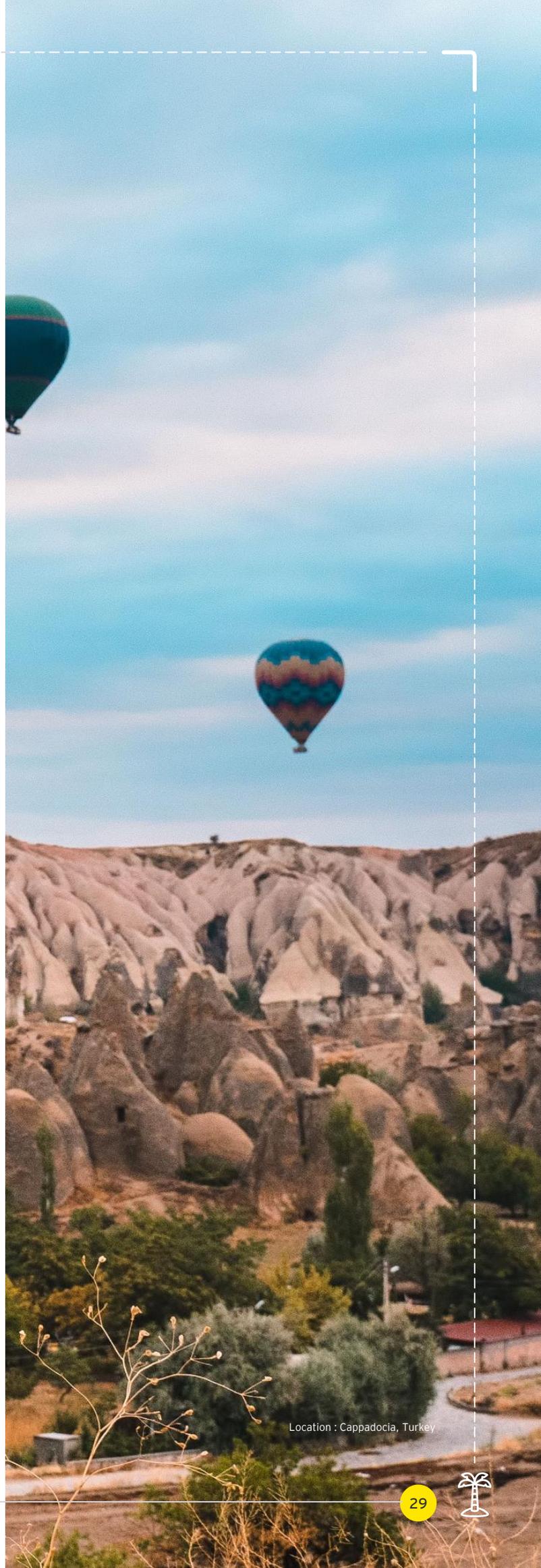


Markus Tan

Regional Director for IMESA, Singapore Tourism Board



Indian travellers are drawn to experiences that combine luxury with authentic cultural connections. What sets them apart is their desire for familiarity and warmth, seeking destinations that offer comfort, personal engagement, and a sense of belonging.

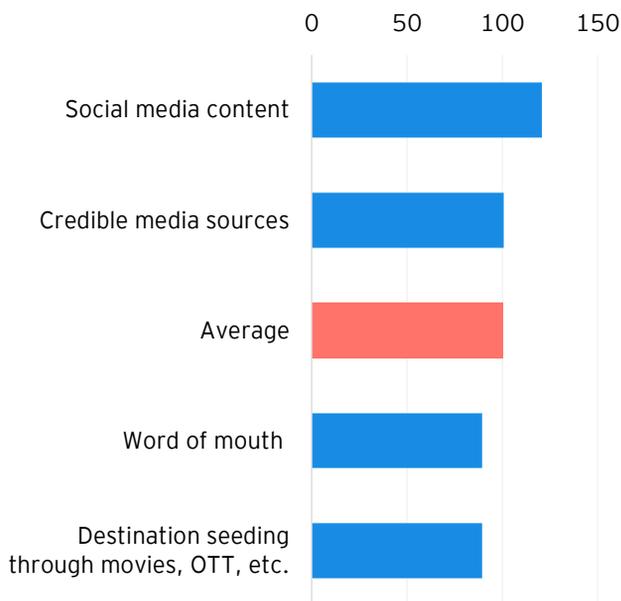


Location : Cappadocia, Turkey



According to TSPs, social media has high influence in selecting a travel destination among the youth; while credible media has maximum impact on mature travellers

Q: Rank the following by their influence on choosing a travel destination (indexed to average)



Survey of travel service providers



Vishal Suri
CEO, SOTC Travel Limited



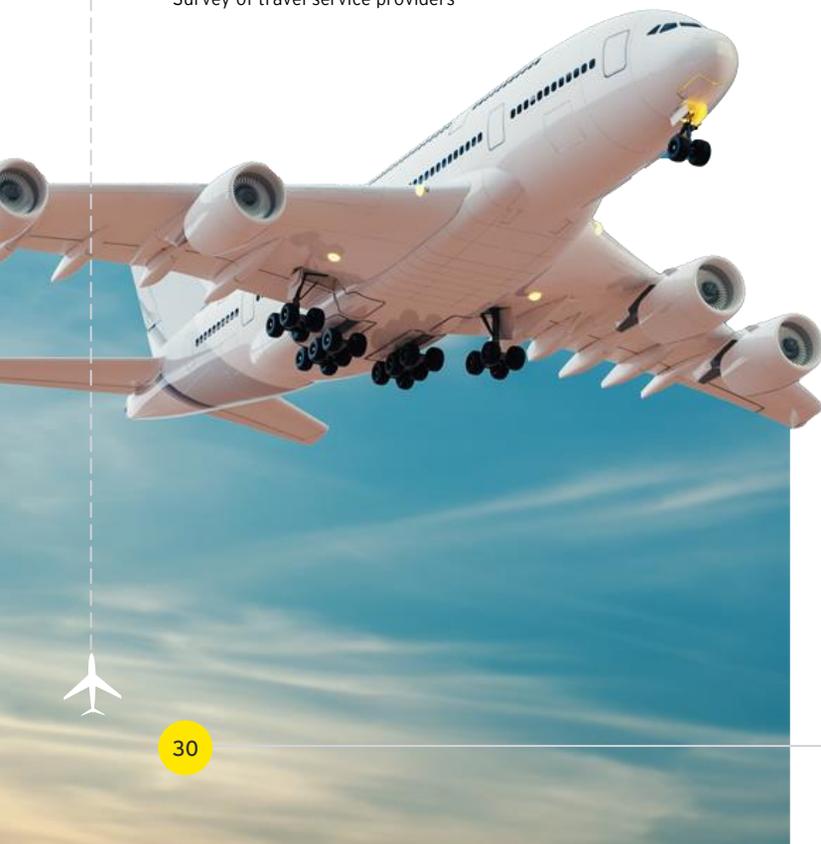
Travel trends in India are primarily driven by tech-empowered millennials and Gen Z travellers. Technology continues to play a significant role in reshaping the industry, with AI-powered personalisation enhancing these trends and providing personalized, seamless experiences. Over the next 2-3 years, India's tourism industry is poised to become a major force in the global travel landscape.



Sudhir Patil
Founder and Chairperson, Veena World



Indian travellers are embracing experiences over materialism, with a noticeable shift toward global exploration and group travel for security. This evolving mindset, fuelled by the desire for self-enjoyment, signals a booming future for the travel industry.

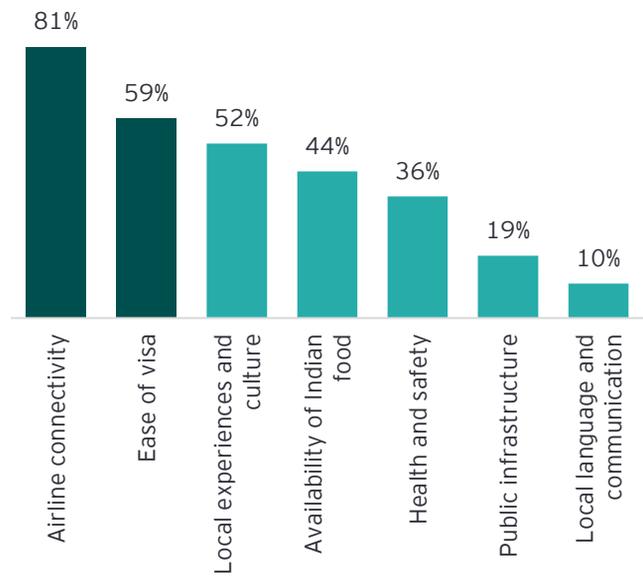




Location : Kanagawa Prefecture, Japan

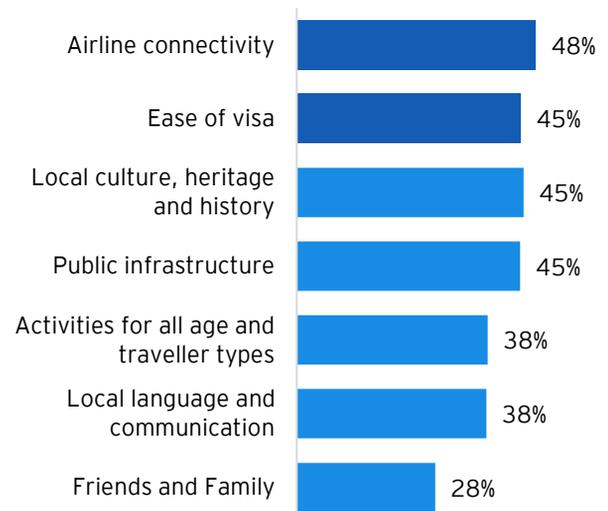
Airline connectivity and ease of visa are the most important parameters as per TSPs to promote a destination as well as for selection by travellers

Q: Which of the following parameters do you use to promote a particular destination to a leisure traveller?



Survey of travel service providers

Q: Select the top three factors that impact your travel destination preference



Survey of travellers

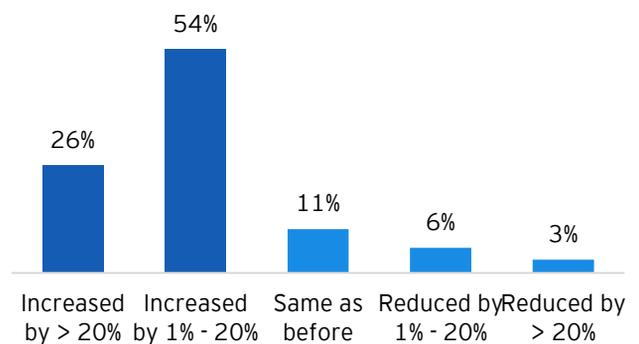




Budget allocation

80% TSPs believe traveller budgets had increased since 2022, with 26% stating that the increase was >20%

Q: What trends have you observed in per person budget since 2022?

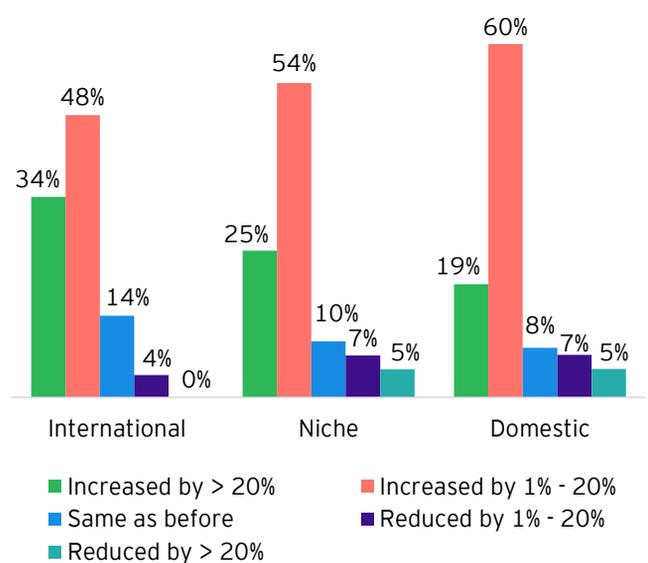


Survey of travel service providers



International travel budgets increased fastest, followed by budgets for niche travel

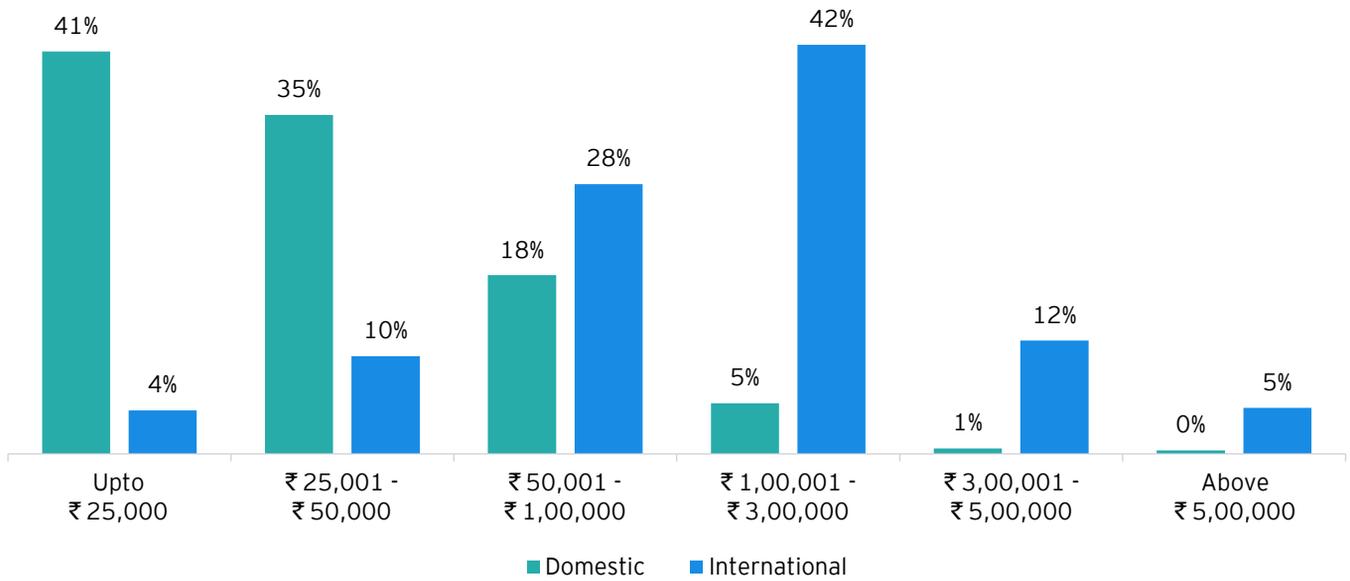
Q: What trends have you observed in per person budget since 2022?



Survey of travel service providers

76% respondents had a budget below ₹ 50,000 per head for domestic travel while the median spend for international travel was above ₹100,000 per head

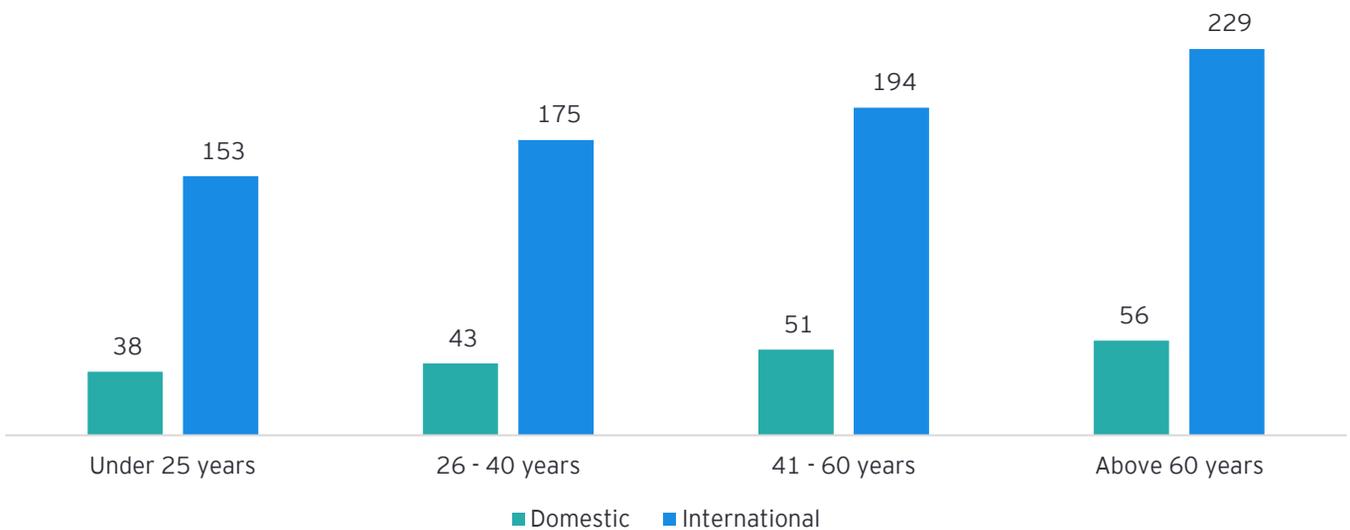
Q: What is your average travel / vacation budget per person per trip (including travel)?



Survey of travellers

International travel budgets were approximately 4x of domestic travel spends

Q: What is your average travel / vacation budget per person per trip (including travel) (₹ in '000)?



Survey of travellers



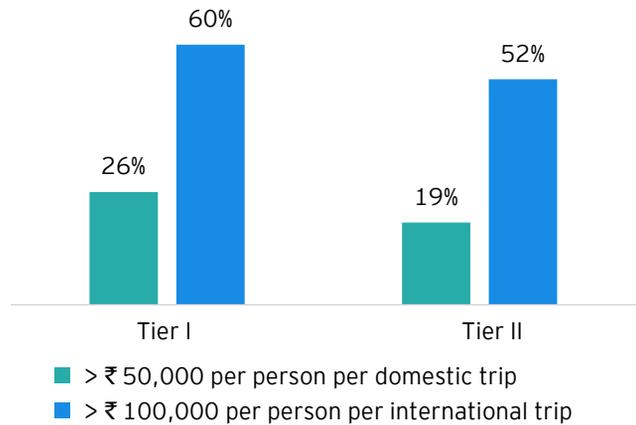


Picture credits : Saudi Tourism Authority
Location : Al-Balad, Jeddah



While Tier I respondents spent more, there was no significant difference in spending patterns between Tier I and Tier II markets

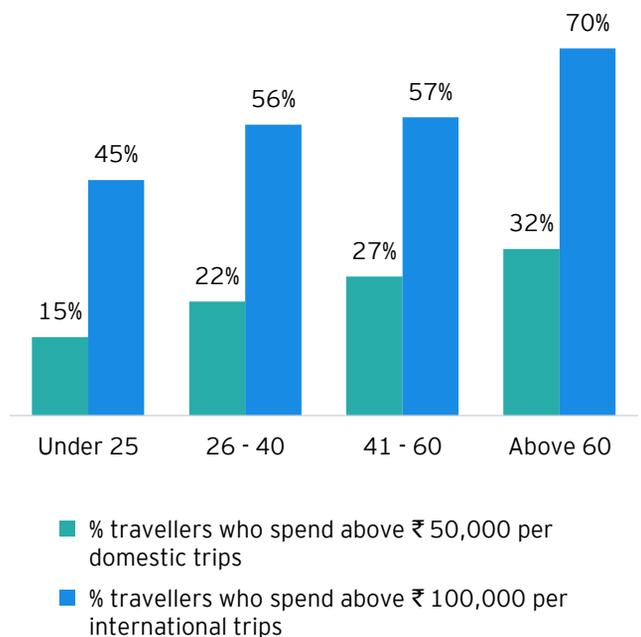
Percentage travellers willing to pay



Survey of travellers

Willingness to spend on premium travel increased with age

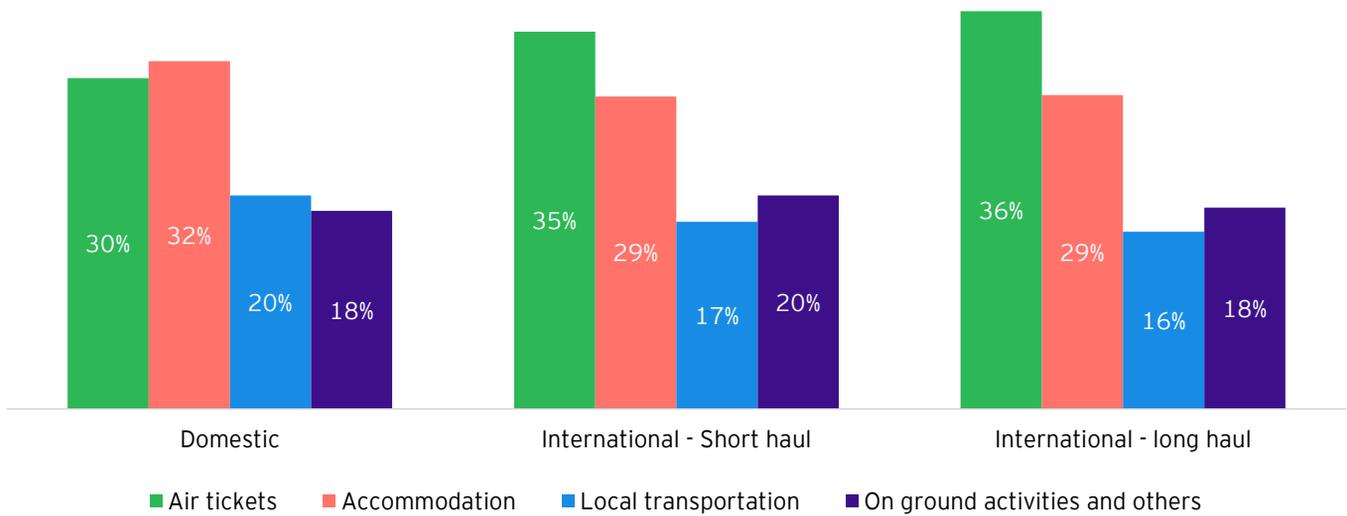
Q: What is your average travel / vacation budget per person per domestic trip (including travel)?



Survey of travellers

Approximately two-thirds of total spend is towards air tickets and accommodation

Q: What is the average spend proportion for each of the following components in a tour package?



Survey of travel service providers

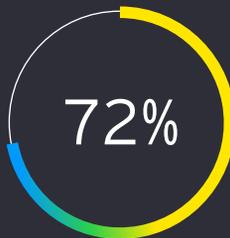
TSP's perspective on willingness to pay

Q: Which of the following services / products are Indian travellers ready to pay for?

Indian meals



Insurance



Flexible booking options



Tour manager / guide



Airport transit



Extra luggage



Survey of travel service providers

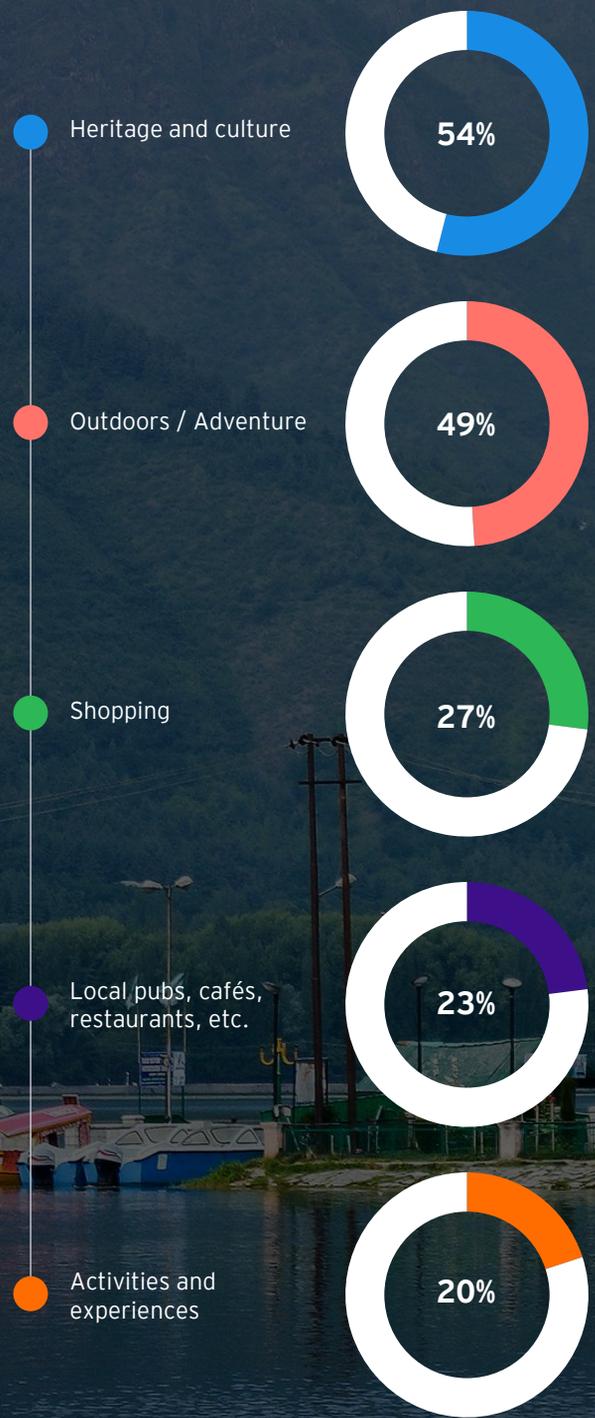




Itinerary curation

Local culture and heritage of the destination were the most exciting factors across all age groups

Q: Which experiences do you look forward to the most on your vacations?



Survey of travellers



Rajesh Magow

Co-founder & Group CEO, Makemytrip



Driven by rising disposable incomes, greater exposure to global cultures, increasing accessibility and affordability, and a willingness to spend more on experience-driven journeys, Indian travellers seek personalisation, flexibility, and authentic local experiences in India and overseas.



Mahesh Iyer

Managing Director and CEO,
Thomas Cook (India) Limited



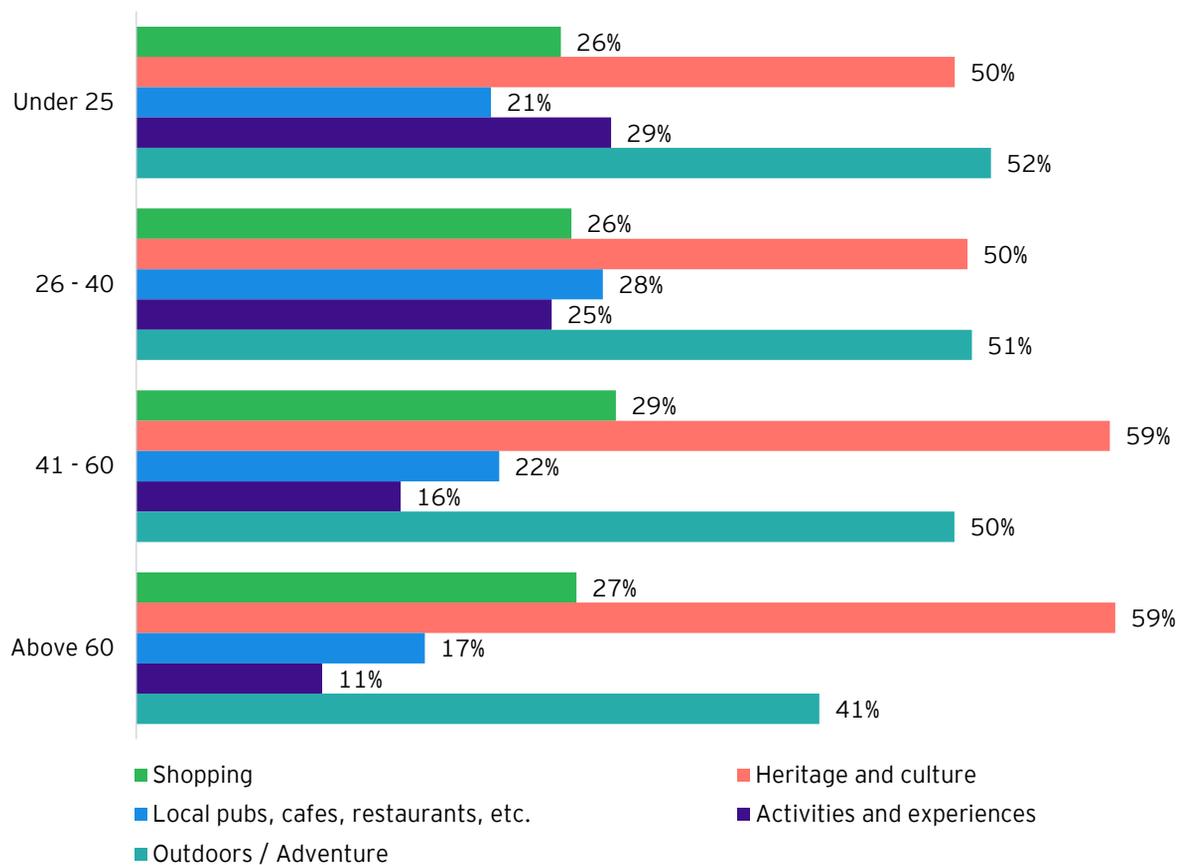
Outbound travel is expected to surge from 13 million to 80 million trips, while domestic air traffic is set to double by 2030, supported by transformative infrastructure investments like 1,250 new aircrafts. Over the next 2-3 years, India will not just participate in shaping the future of global tourism, but lead as a key player.

Location: Kashmir, India



Younger travellers preferred outdoor adventures and activities more

Q: Which experiences do you look forward to the most on your vacations?



Survey of travellers



Anuj Rathi
Chief Business & Growth Officer, Cleartrip.com



There is a surge in adventure and budget travel, and it is expected to continue this year. Exploring uncovered gems within India is also on the rise. Cuisine, weather, culture, and local attractions are key decision drivers among Indian travellers.



Gaurav Luthra
CBO - New Business Development, Yatra.com



Indian corporate travellers and holidaymakers seek smooth, meaningful, and sustainable experiences. Rising incomes and global aspirations position Indian travellers as key drivers in reshaping travel trends and influencing destination choices worldwide.





Himashu Patil
Director, Kesari Tours



Indian travellers are redefining exploration, seeking unique experiences, tailored journeys. With rising living standards, digital influence, and a deep curiosity for global cultures, their enthusiasm for travel is at an all-time high. This evolution marks a new era of discovery, blending adventure with sustainability



Liberatha Kallat
CMD, Dreamfolks



Indian travellers are reshaping global tourism by seeking unique, sustainable, and immersive experiences. Their growing demand for personalised luxury is fuelling the shift in the industry, positioning India as an influencer in the evolving travel economy.

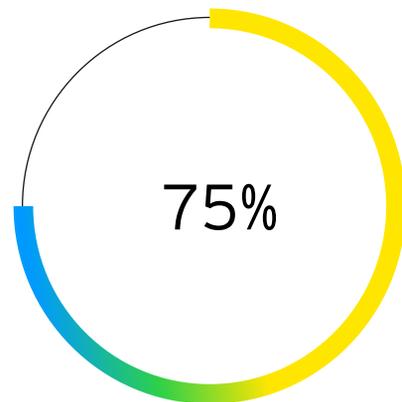
Location : Cappadocia, Turkey

Average length of stay has increased from 2022

Q: What trends have you observed in the length of stay as compared to 2022?



Survey of travel service providers

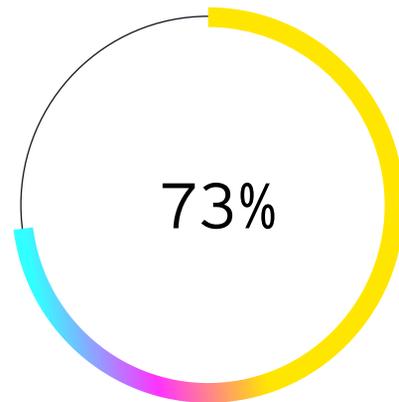


TSPs believed that Indian travellers were willing to pay extra for out-of-the-box experiences





Reservations and bookings

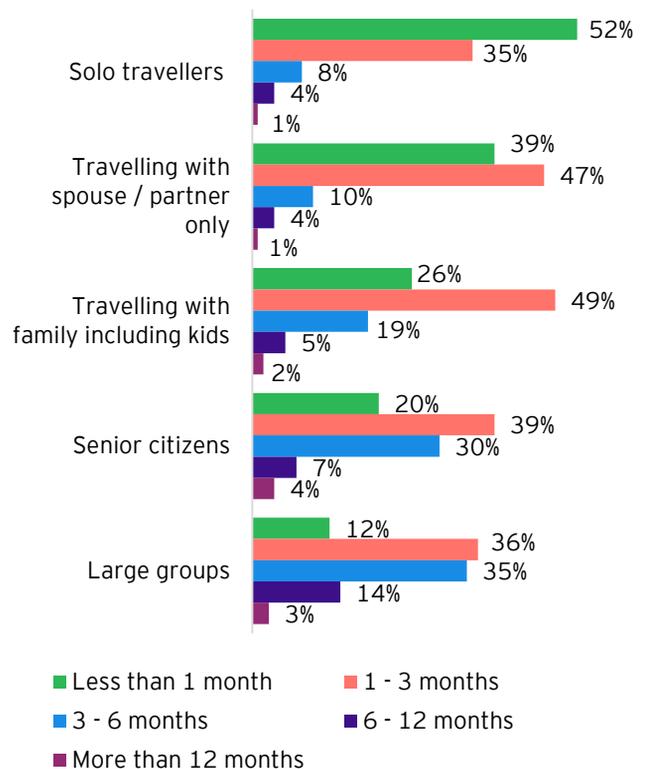


TSPs believed that the younger generation preferred to book themselves

30% bookings made via TSPs are within a month of the travel date

Solo travellers have the shortest booking window while large groups usually take over three months

Q: What is the average booking lead time for each of the following categories of travellers?



Survey of travel service providers



Pieter Elbers
CEO, IndiGo



Indian travellers are increasingly exploring new destinations, driven by curiosity and a desire for unique experiences. They are aspirational, often family oriented, and balance being value conscious with a preference for comfort. The rich diversity of India reflects in the different travellers, and their purpose and growing needs of travel.



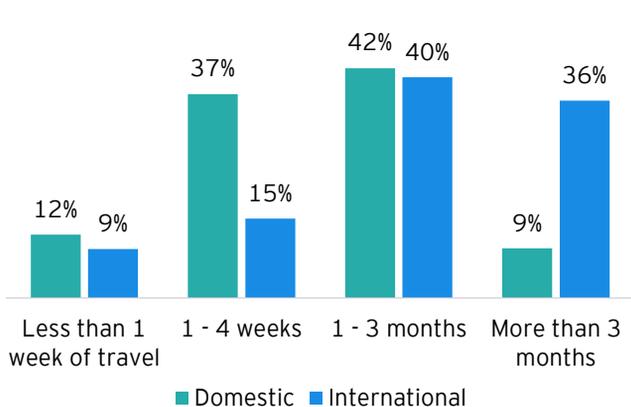
Alan Watts
EVP & President, Asia Pacific, Hilton



India is rapidly modernising its travel infrastructure, from new airports to an upgraded rail network. Tier II and Tier III cities, once under-explored and under-developed, are now thriving travel destinations, thanks to India's extensive road network. In the US, by comparison, the ratio of hotel rooms to people is 1:60, but in India, it stands at 1:3,500. This gap represents a massive opportunity for growth in both hospitality infrastructure and services.

51% domestic travellers and 76% international travellers book flights more than a month in advance

Q: How well in advance do you book your air travel?

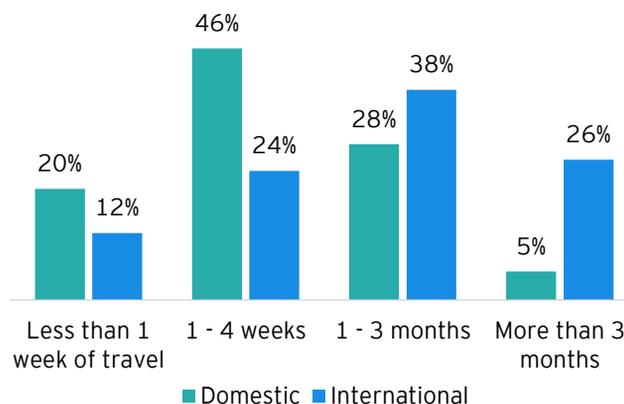


As age increases, travellers prefer making reservations well in advance

Survey of travellers

66% domestic and 64% international stays are booked more than a month in advance

Q: How well in advance do you book your hotel?

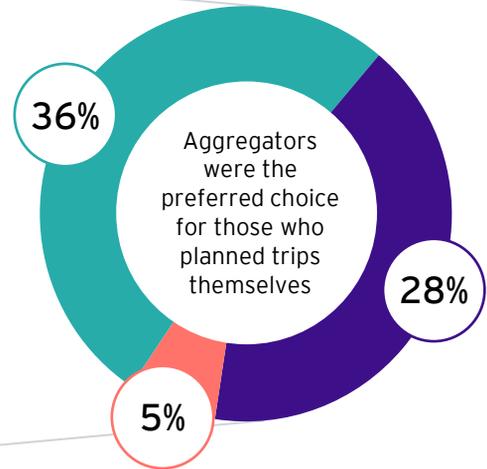
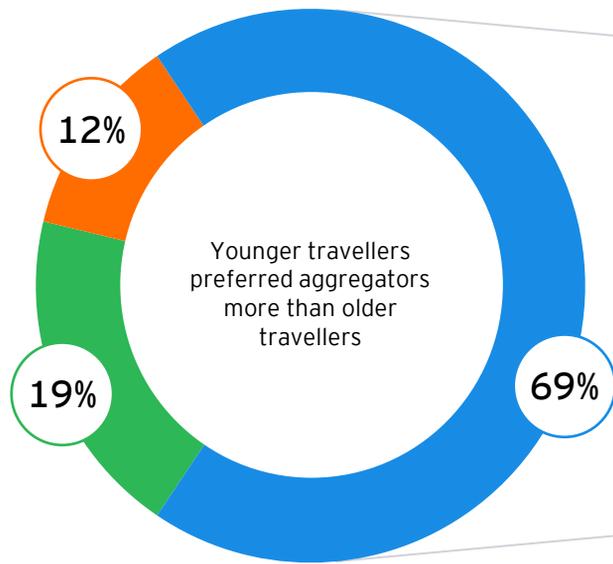


Survey of travellers



69% travellers preferred to plan the trips themselves

Q: How do you book your vacation?



- Call the travel agent
- All inclusive holiday package online
- Do the bookings myself
- Aggregator
- Loyalty rewards
- Direct supplier

Survey of travellers





Santosh Kumar

Country Manager, India, Sri Lanka, Maldives and Indonesia, Booking.com



In 2025, we'll see a shift towards experiential travel with trends like noctourism, wellness retreats, luxury travel and multigenerational getaways gaining traction. This discerning traveller will prioritise personalised experiences and embrace technology while seeking authentic connections and responsible travel practices.



Manoj Samuel

CEO & Director, Riya Travels



While seeking premium experiences, Indian travellers remain price-conscious and increasingly rely on digital platforms for their travel needs. Their travel often combines leisure with business or family visits, and the availability of Indian cuisine is highly valued. This discerning demographic is driving the evolution of global tourism, demanding tailored experiences and making a significant economic impact.



Picture credits : Saudi Tourism Authority
Location : Red Sea Coral Reefs, Saudi





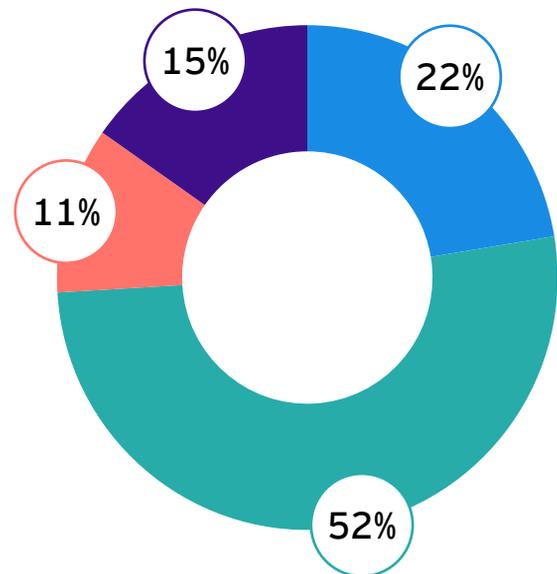
Reservations and bookings (accommodation)



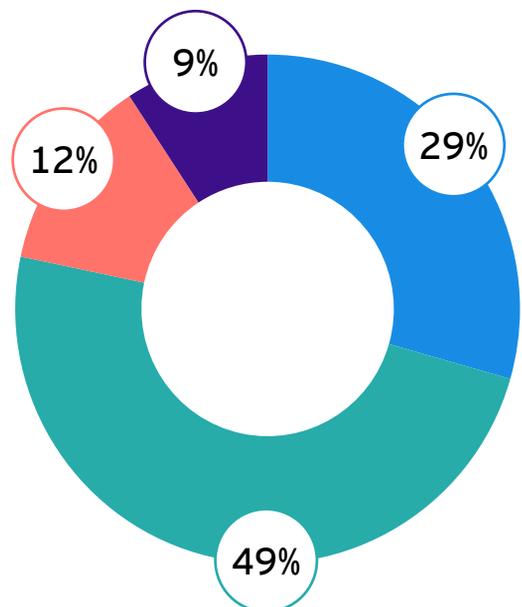
Mid-range hotels are preferred in international travel

Q: Which accommodation category do you usually choose on your travels?

Domestic



International



- Mid-range hotels
- Budget hotels / hostels
- Local homestays and villa rentals
- Luxury hotels

Survey of travellers



Ranju Alex
AVP - South Asia - Marriott International



Indian travellers are shaping the future of travel that is premium, responsible and immersive post-pandemic. Luxury represents India's coming-of-age, with travel taking centre stage as travellers seek unique moments that blend opulence with culture, art, and music. Sustainability and wellness have also emerged as key trends, with travellers gravitating towards eco-conscious accommodations that promise slow and health-focused journeys. Their growing interest in rejuvenation and spirituality is also influencing a spike in popularity of wellness-focused retreats and mindful activity offerings, ranging from Ayurveda and yoga to spiritual tourism in destinations like Ayodhya, Varanasi, and Badrinath.



Anuraag Bhatnagar
CEO, The Leela Palaces, Hotels and Resorts



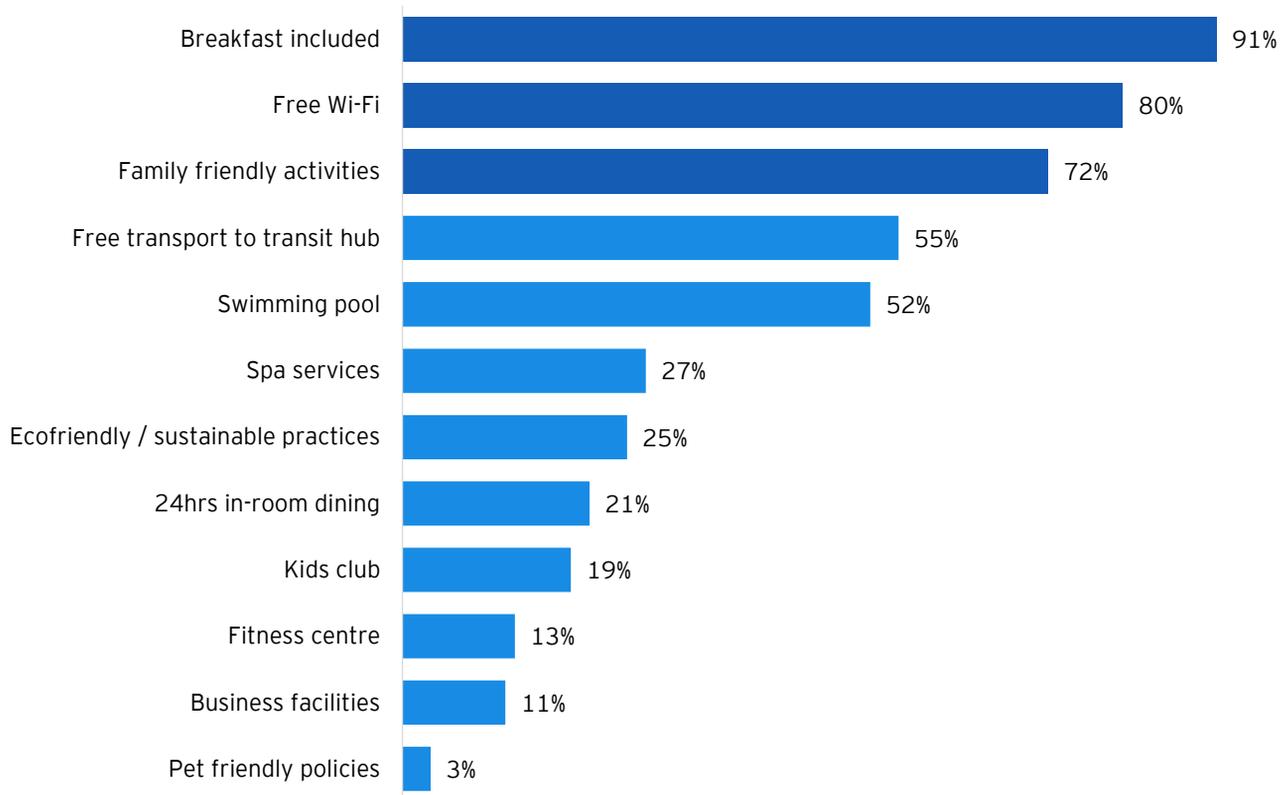
The luxury Indian traveller is distinguished by their quest for experiential journeys that integrate modern luxury with cultural heritage.

Post-COVID, Indian travellers are increasingly drawn to wellness-focused, personalised, and exclusive experiences. The demand for transformative journeys, be it through spiritual retreats, curated wellness escapes, or luxury weddings, has surged. Additionally, destination exclusivity, reflects a growing emphasis on privacy and safety. Rise of destinations like Kashmir and Sikkim reflect a broader trend towards immersive travel.

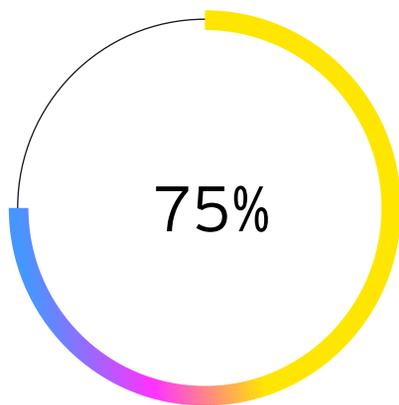


Inclusion of breakfast, free Wi-Fi and availability of family-friendly activities are the key hotel selection factors

Q: Which are the amenities and features TSPs look for while suggesting hotels to Indian travellers?



Survey of travel service providers



TSPs believed that Indians would not pay extra for early check-in/ late check-out





Alessandro Cabella

Sr. Vice president & General Manager,
Cinnamon Life at City of Dreams, Sri Lanka



The Great Indian Traveller is more than just an explorer—they are storytellers, seekers of the extraordinary, and lovers of culture, cuisine, and meaningful connections. They don't just visit a place; they immerse themselves in it. At Cinnamon Life, we've created a destination that speaks to this spirit.

Location : Dubai, United Arab Emirates





Undertake travel

Forex cash and international credit cards are the most preferred payment options overseas

Q: Which are your preferred modes of payment on international trips?



Survey of travellers

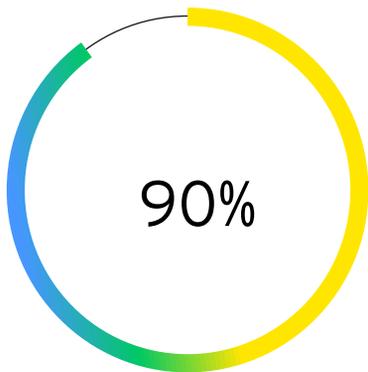


Sandeep Ghosh

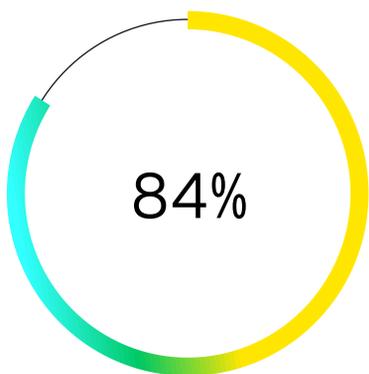
Group Country Manager - India and South Asia, Visa



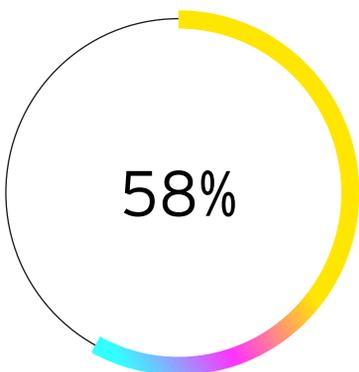
Indian travellers are transitioning from cash to digital payments. Increasingly, they are choosing multicurrency forex prepaid cards, debit and credit cards as their preferred payment modes overseas, due to convenience, enhanced security, lower fee, and attractive offers. This trend is reshaping international travel and will propel tourism towards a future driven by digital payments.



TSPs believed that "free" services were the biggest attractions for travellers (e.g. sim cards, Wi-Fi, merchandise, etc.)



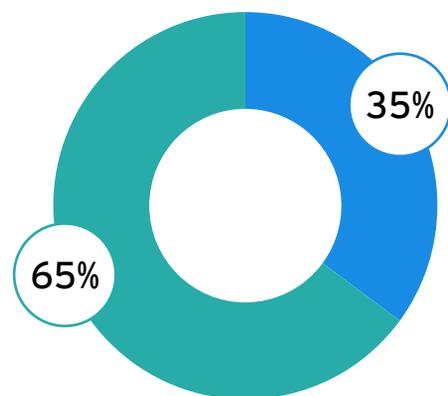
TSPs believed that Indian snacks were a must while travelling



TSPs believed that Indians would spend on international roaming cards

65% Indian travellers prefer to carry Indian food overseas; preferred food items are savouries and ready-to-eat meals

Q: Do you carry Indian food items while packing for your overseas trip?

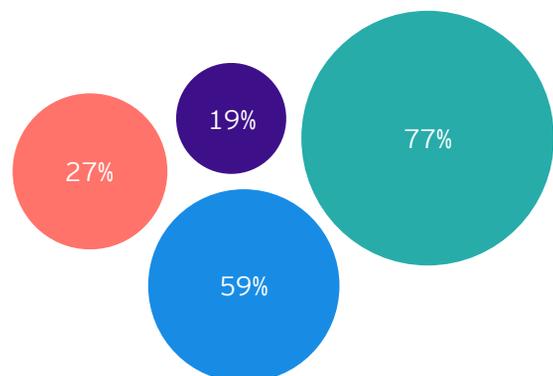


- Yes, prefer carrying some as back-up
- Not at all

Survey of travellers



Q: Which of the following Indian food items do you pack when travelling abroad?



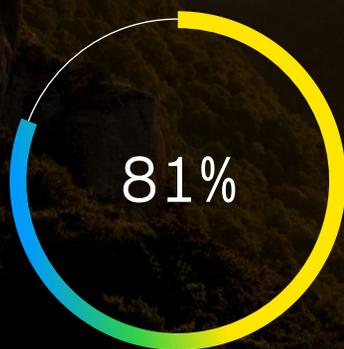
- Savoury snacks (chips, khakhra, chiwda, etc.)
- Ready to eat food (*thepla, dal khichdi, pav bhaji*, etc.)
- Premix *chai* / coffee
- Pickle & *papads*

Survey of travellers

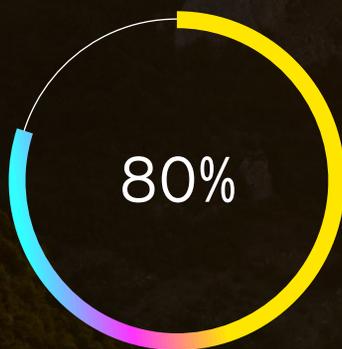




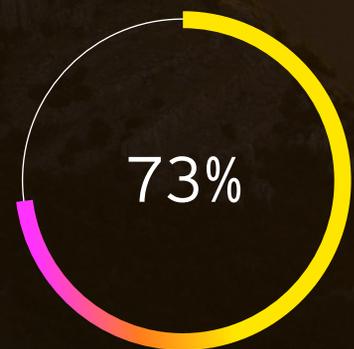
Understanding the mind of 'The Great Indian Traveller'



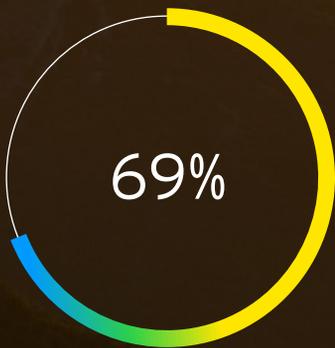
would save for a holiday rather than buy a piece of jewellery



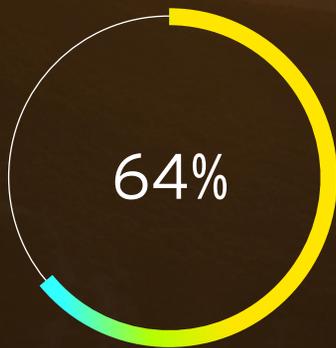
would rather opt for a weekend getaway than spend on a movie or luxury dining experience



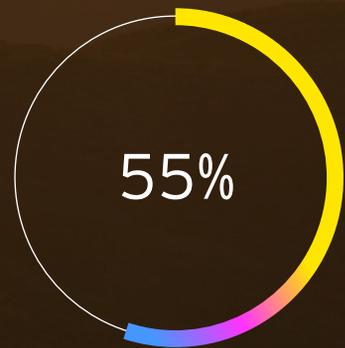
would plan their own trips as compared to join a group tour



consider themselves to be light packers



would prefer three domestic trips to one international trip



would still connect to local Wi-Fi than buy an international roaming pack





4

Outlook for Indian leisure travel



What next for 'The Great Indian Traveller'?

While religious tourism is still among the top preferences, Indian tourists are also preferring new experiences in the form of sports, entertainment, cruises, wellness, and adventure tourism, which are driving the sector's growth. Once considered a luxury, travel has become a source of wellbeing and a way to gather unique experiences, which may constitute shopping, activities or even culinary experiences. What makes the sector uniquely Indian is the preference for deals and discounts, which also mean that the gap between local travel operators and online travel aggregators with larger risk appetite is growing. Recent trends show that the sector still has a lot of potential to unlock from the Tier II and III markets and we should see many exciting developments and new trends in the coming period.

This section summarises the various thoughts and imperatives we heard from the CEOs we interviewed for this report

Domestic travel

- Religious, sports, entertainment, cruises, wellness and adventure tourism are leading growth in the domestic travel industry
- The hospitality industry, especially resorts, is experiencing growth due to an increased preference for leisure and luxury-driven indoor experiences
- Though ranking lower among aspirational lifestyle preferences such as housing, cars and education, travel is no longer considered a luxury by Indians but a part of well-being and self-prioritisation
- Despite having adequate affluent audiences, Tier II and III markets have not met potential, indicating the need to educate these markets on travel options
- Young travellers need to combat the biases of elder family members in-case they are less travelled

International travel

- Indian leisure travellers venturing overseas are increasingly seeking experiences that are rich in activities, whether it's engaging in local adventure sports, participating in cultural workshops, or exploring the outdoors, alongside their pursuit of culinary delights and shopping escapades
- Reasons for long-haul international travel usually include business or visits to friends or family, except in the case of very high budget travellers
- Short-haul international travel is growing, specifically for 3-5-night short vacations via low-cost carriers and direct flights with easy visa
- Travellers from Tier I markets usually prefer itineraries containing detailed exploration of fewer countries compared to shallow "touch-and-go" explorations of more countries
- First-time international travellers and those who fear visa rejection usually prefer group inclusive tours (GIT)
- Indian travellers are confident and assertive in their choices, embracing their unique travel behaviours with pride

Business of travel

- Indian travellers have an enormous preference for discounts and offers as indicated by the fact that 70% to 80% bookings happen during deal periods
- The number of local travel agents continue to shrink, as consumers show an increasing preference towards online tour operators who are willing to take risks on cancellations of airlines and hotels while offering booking flexibility and enhanced payment options to travellers



Growth outlook and drivers

India's travel industry is likely to grow at 12-15% annually for the next five years, with domestic travel increasing at 12-13% and international travel at an accelerated rate of 18-20%, thanks to rising short-haul destinations. This growth is supported by an expanding middle-income population, projected to add 20 million people, alongside two million high-income earners. India's GDP growth, a robust stock market, and political stability are also key factors contributing to this growth.

The National Digital Tourism Mission (NDTM) is revolutionising the industry with digital enhancements to enrich tourist experiences and streamline business operations. It particularly advances niche sectors like wellness, religious, cultural and adventure tourism.

With 93 million passport holders and 50 million affluent leisure travellers, India's potential for outbound travel is significant. Increased passport ownership and expanded access to international travel are poised to spur further growth in the industry.

Future outlook and macro drivers

- Industry discussions indicate that the travel industry would grow at the rate of 12-15% annually for the next five years
- Domestic, by far the largest segment, would continue to grow at 12-13%
- International travel would grow faster at 18-20% due to rise in short-haul destinations
- With India adding more than 20 million middle-income people and two million high-income people in the next five years, growth of the travel industry would ride on its continued GDP growth, a vibrant stock market and political stability¹²
- The National Digital Tourism Mission (NDTM)¹³, a transformative initiative by the Government of India, aims to create a seamless digital infrastructure to revolutionise tourist experience and enhance the efficiency of business operations within the industry
- The NDTM has aided the niche domestic leisure sector through development drivers including wellness and medical, religious and culture, and adventure
- Passport penetration in India is approximately 93 million¹⁴, of which around 50 million are leisure travellers¹⁵ from affluent households, indicating significant potential for outbound travel¹⁶
- India must initiate programmes to increase passport ownership, making international travel more attainable for a larger segment of the population



Industry-level initiatives which can grow the travel sector

- **Form a centralised travel and tourism authority:**
 - Establish a national travel council to streamline grievance redressal, regulate industry entry through licensing, and represent the travel sector in dialogues with government bodies
 - Equip the body with an aim to tackle the problems of fragmented infrastructure, weaker global positioning and inconsistent funding while driving future-ready innovation initiatives
- **Invest in data infrastructure:**
 - Create an integrated data repository to analyse trends across various tourism sectors, enabling informed decision-making for both public and private stakeholders. (Countries like Singapore, Macau, Japan and New Zealand have already initiated similar infrastructure projects)
- **Encourage travel education:**
 - Develop educational initiatives that prepare citizens for international travel, including information on visas, cultural norms and safety
- **Stimulate travel-related careers:**
 - Offer incentives for pursuing education and career in the tourism industry to build a skilled workforce
- **Upgrade travel infrastructure:**
 - Commit to enhancing transportation and accommodation facilities to improve travel experiences within and outside the country
- **Champion sustainable tourism:**
 - Advocate eco-friendly travel practices to preserve cultural and natural heritage
- **Bolster domestic tourism:**
 - Encourage domestic travel, to serve as a foundation for future international travel
- **Enhance safety measures:**
 - Strengthen safety protocols across all travel services to ensure traveller confidence and security
- **Embrace technological solutions:**
 - Leverage technology to provide travellers with user-friendly tools for planning and experiencing travel
- **Expand tourism offerings:**
 - Support the development of niche tourism markets to attract diverse traveller interests



Location : Maasai Mara National Reserve, Kenya



The critical role played by tourism boards

Based on the trends and developments in the Indian travel sector, we recommend foreign and state tourism boards to undertake initiatives which can provide further boost to the sector. Foreign tourism boards could look at tailored experiences for Indian travellers, including affordable stays, Indian cuisine and convenient transport. They may also focus on training guides on cultural nuances and language translation while also streamlining visa processes with options like visa on arrival and lower costs. Specifically for short-haul international destinations, direct flights and easy immigration would greatly boost the sector.

In the domestic sector, state tourism boards must provide holistic travel packages, improve connectivity from Tier II and III cities, and ensure clear marketing of access routes. Collaboration with travel agents to craft appealing packages and comprehensive itineraries are essential. Local transport should be monitored for fair practices, and amenities at travel hubs upgraded.

Foreign tourism boards

Be India ready:

- Demarcate India-friendly localities offering a combination of budget accommodation, palatable food options and direct connectivity to public transport
- Provide trained guides who understand the nuances of Indian travellers and equip them with translation technology for key Indian languages
- Ensure that information around Indian restaurants and vegetarian food options are readily available for tourists
- Promote local shopping experiences through discounts and waive local duties/ tax applied to Indian travellers
- Provide discounts for children and senior citizens across popular attractions
- Permit self-drive car rentals as an option for local transport for those with a valid Indian driving license

Work on the visa experience:

Enhance the ease of obtaining visas, which could include:

- Visas on arrival for Indians (reducing risks for travellers)
- Multiple-entry visas
- Lower visa application costs
- Standard visa processes across countries for frequent Indian travellers, which vary significantly and result in longer elapsed times
- Privileges of visa on arrival / e-visas for Indian travellers holding valid US/UK/Japan/Australia visas

Increase convenient connectivity:

- Increase the allure of destinations through direct flights and better connectivity

Align immigration policies:

- Ensure that tourism promotion efforts are in sync with immigration regulations to facilitate a hassle-free entry for Indian travellers

The short-haul advantage:

- Develop focussed India strategy enabling short-haul neighbouring countries like Sri Lanka, Nepal and Bhutan to grow their respective travel sectors

Increase trade partnerships:

- Build local partnerships with tour operators and travel agents to increase their destination knowledge within the Indian service provider eco-system
- Advertise key attractions to improve visibility of destinations in India



State tourism boards

- **Provide holistic packages:**
 - Facilitate growth in travel connectivity (high-speed premium trains, airports, etc.)
 - Provide holistic travel experiences by enhancing the quality of services across accommodations, excursions, guides and transportation to attract affluent travellers
- **Build non-metro connectivity:**
 - Target Tier II and III cities and focus on enabling direct flights and trains to increase tourism
 - Ensure that marketing materials for destinations include clear information on access routes to build traveller interest
- **Partner with agents:** STBs should partner with travel agents to create packages and incentives which encourage travel into their states
- **Offer comprehensive itineraries:** Create and promote packages that combine various local experiences, streamlining the booking process for travellers
- **Oversee local transport:** Monitor local transport providers to safeguard against unethical practices and enhance tourist experiences
- **Improve basic amenities:** Upgrade facilities such as sanitation, food and water at key travel junctions to meet the needs of travellers
- **Highlight local heritage and stories:** Market the unique cultural and historical aspects of destinations to attract tourists seeking authentic experiences
- **Adopt digital engagement:** Utilise digital platforms and social media to showcase destinations and their unique aspects and stories, and interact with potential visitors through them
- **Implement comprehensive guide training programmes:**
 - Focus on ethical conduct, cultural sensitivity, environmental awareness, communication skills and local knowledge, besides strict licensing, regular monitoring and a robust complaint system to hold guides accountable for inappropriate behaviour
 - Explore options to mandate visits / entry in key tourist sites with local guides to encourage local employment and sharing of cultural heritage with visitors





5

About the report



Methodology

This report reflects the findings from our online survey of Indian travellers (5,000+ individuals) and online and offline surveys of 100+ travel industry service providers.

The results of the survey, will therefore be impacted by the type and nature of respondents and their level of maturity.

Responses received from survey respondents have not been reverified. They were collated and aggregated (or averaged where required) to provide analysis.

The survey was administered in an online manner from November to December 2024 by EY and all responses received were tabulated directly by EY.

Disclaimers

This report has been developed by conducting primary and secondary research, discussions with several companies and industry stakeholders, and cross referencing of available data points. To the extent possible, the data has been verified and validated. However, there can be no guarantee that such information is complete or correct as of the date it is received or that it will continue to be correct in the future.

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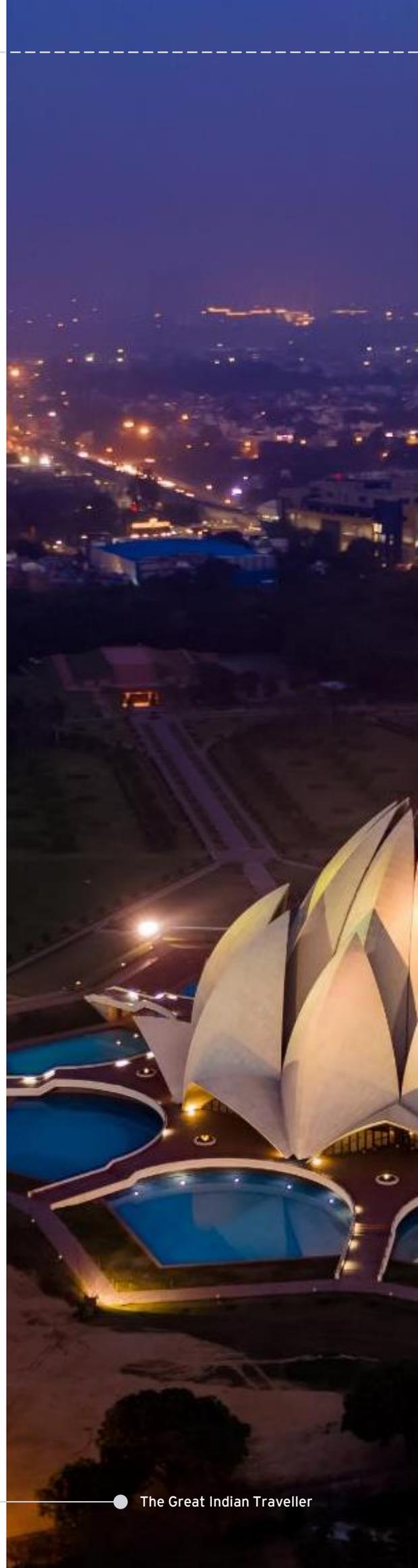
Glossary

BCCL	Bennett Coleman and Company Limited
Bn	Billions
CII	Confederation of Indian Industry
CEO	Chief Executive Officer
DTV	Domestic tourist visit
EMI	Equated monthly instalments
EY	Ernst and Young
GDP	Gross domestic product
GIT	Group inclusive tour
IND	Indian national departures
₹	Indian Rupee (US\$1 = ₹85)
Mn	Millions
NDTM	National Digital Tourism Mission
OTA	Online travel agency
OTT	Over-the-top streaming platform
PoV	Point of view
STB	State tourism board
TSP	Travel service provider
UT	Union territory
YTD	Year to date



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