Domestic Tourism Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Online Travel & Booking Platforms (Hospitality & Tourism)
> **Source:** https://www.mordorintelligence.com/industry-reports/global-domestic-tourism-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 2.64 trillion
Projected Forecast (2031)	USD 2.64 trillion
Growth Rate (CAGR)	6.46 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Domestic Tourism Market industry](images/chart_2.png)

![Domestic Tourism Market  (2026 - 2031)](images/chart_3.png)

![Domestic Tourism Market : Market Share by Tour Type](images/chart_4.png)

![Domestic Tourism Market : Market Share by Product Type](images/chart_5.png)

![Domestic Tourism Market  CAGR (%), Growth Rate by Region](images/chart_6.png)

![Domestic Tourism Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2022 - 2031 |
Market Size (2026) | USD 2.64 Trillion |
Market Size (2031) | USD 3.61 Trillion |
Growth Rate (2026 - 2031) | 6.46 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Domestic Tourism Market Analysis by Mordor IntelligenceThe Domestic Tourism Market size was valued at USD 2.25 trillion in 2025 and is estimated to grow from USD 2.64 trillion in 2026 to reach USD 3.61 trillion by 2031, at a CAGR of 6.46% during the forecast period (2026-2031).

The domestic tourism market remains the base layer of travel demand, as global domestic tourist trips reached 14.41 billion in 2025, indicating that local and national travel still account for the largest share of tourism activity across most economies[1]WTCF.ORG.CN https://en.wtcf.org.cn/20260323/4f2fbc27-8bbe-702f-4124-895fb89effe4.html. This level of demand is evident across major travel systems, including China, with 6.52 billion domestic trips in 2025, and the European Union, with 850 million domestic trips in 2024[2]EUROPA.EU https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20251010-3. The domestic tourism market is also being supported by steady public promotion of local travel, stronger domestic connectivity, and a wider spread of leisure spending beyond the largest gateway cities. At the same time, the domestic tourism market is seeing faster digital adoption in trip discovery and booking flows, while regulation around accommodation supply and ongoing cost pressure are shaping how demand converts into completed trips. Competitive conditions remain highly fragmented, leaving room for large platforms, hotel groups, and local operators to continue expanding through product depth, loyalty, and greater control over the traveler journey in the domestic tourism market.

Key Report Takeaways

* By tour type, leisure tourism held 38.3% of the domestic tourism market share in 2025, while sports tourism is forecast to expand at a 10.5% to 12% CAGR through 2031.
* By tourism type, local travel held 55.9% of the domestic tourism market share in 2025, while interstate travel is projected to record the highest CAGR of 9.5% to 11% through 2031.
* By mode of booking, offline bookings held 54.8% of the domestic tourism market share in 2025, while online bookings are forecast to grow at a 11% to 13% CAGR through 2031.
* By demographics, group travelers held 58.1% of the domestic tourism market share in 2025, while solo travelers are projected to expand at a 10% to 11.5% CAGR through 2031.
* By geography, North America held 30.8% of the domestic tourism market share in 2025, while the Asia-Pacific is forecast to record the fastest regional CAGR of 10.5% to 12.5% through 2031.
* By company, Booking Holdings led the competitive field with an estimated 1.3% share in 2025, while the top 5 players together accounted for an estimated 4.3%.

Key Market Trends

Global Domestic Tourism Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Local Tourism Stimulus and Destination Marketing	+1.0%	Global, with concentrated gains in Asia-Pacific, the Middle East, and South America	Medium term (2-4 years)
Digital Booking and AI Trip Planning Adoption	+1.2%	North America, Europe, and Asia-Pacific, with spillover into the Middle East and Africa, and South America	Short term (≤ 2 years)

Rise Of Experiential and Regional Travel	+0.8%	Global, with strong gains in Asia-Pacific secondary cities and North America lifestyle markets	Medium term (2-4 years)
Middle Class Expansion and Affordable Transport Access	+1.1%	Asia-Pacific, the Middle East, and South America	Long term (≥ 4 years)
Night Time Economy Monetizing City Breaks	+0.5%	North America, Europe, and the Asia-Pacific urban centers	Medium term (2-4 years)
Wallet-Based Digital Identity Reducing Booking Friction	+0.4%	Europe, North America, and digital-first Asia-Pacific markets	Short term (≤ 2 years)
Source: Mordor Intelligence			

Competitive Landscape

Competitive Landscape

The domestic tourism market remains highly fragmented because spending is spread across OTAs, hotel groups, short-stay platforms, transport providers, attractions, and a very large base of local operators. That structure limits the share any single company can hold across the full domestic tourism market, even when individual brands are very large in their own channels. Based on the supplied company share estimates, the top 5 players together held only 4.3% of the domestic tourism market in 2025, with Booking Holdings at 1.3%, Marriott International at 1.3%, and Airbnb at 0.6%. Booking Holdings' FY2025 disclosures still show significant scale, with USD 186.1 billion in gross bookings, confirming its importance in digital travel distribution even in a fragmented market. Marriott International's FY2025 annual report also points to a large accommodation footprint and strong revenue scale, which helps explain why large hotel brands retain influence within the domestic tourism market even without dominating it outright.

Competitive strategy in the domestic tourism market is increasingly centered on owning more parts of the traveler journey. Expedia Group gave a clear example in 2026 when it introduced new AI experiences, a Model Context Protocol server for partners, and a wider ecosystem approach tied to discovery and mobility. Amadeus and Lufthansa offered another example through their EU Digital Identity Wallet test, which points to a booking and check-in process that is more integrated and less manual. Airbnb's FY2025 filing also showed the scale of its gross booking value at USD 91.3 billion, underscoring its continued importance in the alternative accommodation and short-stay segments of the domestic tourism market.

The main white space in the domestic tourism market lies in formalizing secondary-city travel, improving digital packaging, and strengthening repeat use through loyalty and simpler planning tools. Many unaffiliated domestic travelers still book parts of their trips separately, which means platforms and hotel groups can gain share by reducing search time and combining transport, stay, and activity options more effectively. The domestic tourism market also leaves room for regional players that understand local inventory better than global brands do, especially in countries where informal supply remains high. At the same time, compliance is becoming increasingly relevant as digital identity, platform accountability, and local accommodation rules shape how suppliers operate and how travelers complete bookings. The competitive picture in the domestic tourism market is therefore unlikely to consolidate quickly. However, the strongest brands can still improve their position by building broader service ecosystems and making travel flows easier to complete.

Domestic Tourism Industry Leaders* Booking Holdings Inc.

* Marriott International, Inc.

* Expedia Group, Inc.

* Airbnb, Inc.

* Hilton Worldwide Holdings Inc.

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Domestic Tourism Market Report ScopeBy Tour TypeLeisure Tourism |
Adventure Tourism |
Sports Tourism |
Wellness Tourism |
Business / MICE Tourism |
Spiritual and Cultural Tourism |
Other (Eco & Nature Tourism,Visiting Friends & Relatives (VFR)) |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
South America | Brazil |
| Peru |
| Chile |
| Argentina |
| Rest of South America |
Europe | United Kingdom |
| Germany |
| France |
| Spain |
| Italy |
| BENELUX (Belgium, Netherlands, and Luxembourg) |
| NORDICS (Denmark, Finland, Iceland, Norway, and Sweden) |
| Rest of Europe |
Asia-Pacific | India |
| China |
| Japan |
| Australia |
| South Korea |
| South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines) |
| Rest of Asia-Pacific |
Middle East and Africa | United Arab Emirates |
| Saudi Arabia |
| South Africa |
| Nigeria |
| Rest of Middle East And Africa |

Frequently Asked Questions

What is the 2026 value of the domestic tourism sector?

The domestic tourism market is valued at USD 2.64 trillion in 2026 and is forecast to reach USD 3.61 trillion by 2031 at a 6.5% CAGR.

Which region leads global domestic travel spending?

North America leads with a 30.8% share in 2025, supported mainly by the United States, where domestic visitor spending reached USD 1.54 trillion.

Which region is expanding the fastest through 2031?

Asia-Pacific is the fastest-growing region, with a projected CAGR of 10.5% to 12

.5%, driven by China's scale and rising domestic demand across the region.

Which travel type is growing fastest within the sector?

Sports tourism is the fastest-growing tour type, with a projected CAGR of 10.5% to 12% through 2031, while leisure remains the largest segment.

How are booking habits changing for domestic travelers?

Offline booking still leads with a 54.8% share in 2025, but online booking is growing faster, with a 11% to 13% CAGR as digital planning and booking tools improve.

Is the competitive landscape concentrated or fragmented?

It is highly fragmented, with the top 5 players accounting for only 4.3% of the market in 2025, leaving substantial room for both global brands and local specialists.