



UNLOCKING THE INDIA MARKET

BY SAT INSIGHTS UNIT



SOUTH AFRICAN TOURISM



Canada

USA

Brazil

Russia

China

Japan

India

South Africa

Australia

Netherlands

UK

Germany

France

Spain

Italy

Nigeria

Kenya

Zambia

Malawi

Mozambique

Botswana

Zimbabwe

Namibia

Eswatini

Lesotho

India facts



Population:
1.409-billion (2024)
 NB: India is the world's most populous country in 2024 overtaking China

CURRENCY

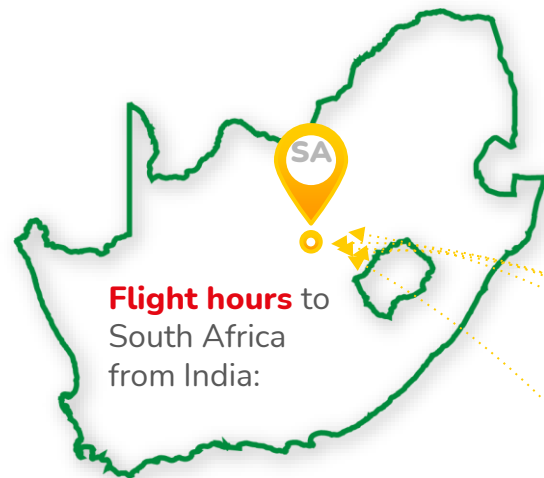


Indian rupees
 Annual average rate 2024
 Exchange rate:
 R0.22 to Rs1

Third-largest
economy
 in the world
 in 2024

Middle class: 10%

The number of people who can afford travel may be somewhat limited to the top 10% of earners in India



Flight hours to
 South Africa
 from India:

Chennai:
 14 hrs
 (Johannesburg indirect)

Bangalore:
 16 hrs
 (Johannesburg indirect)

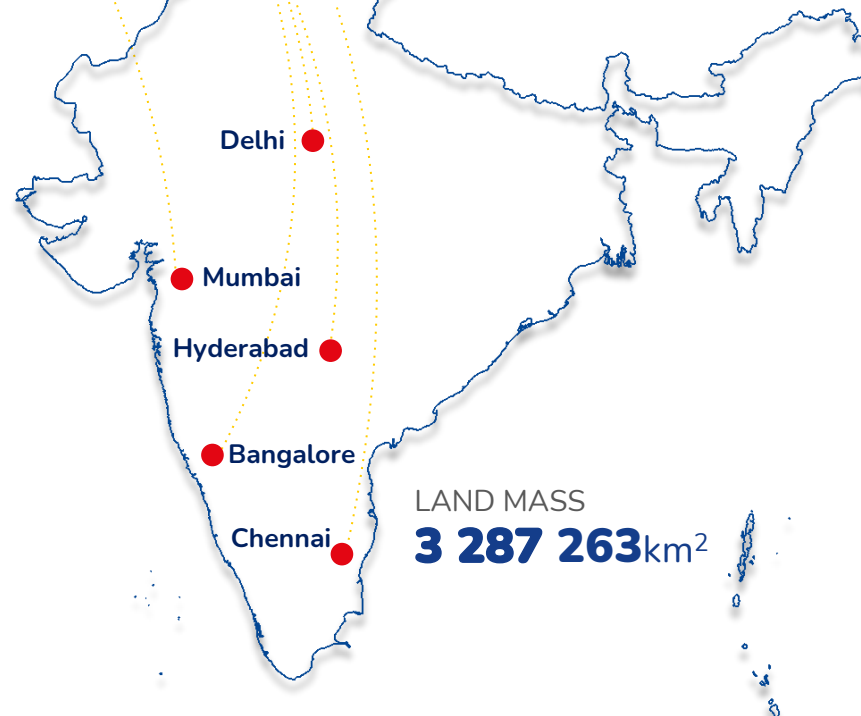
Hyderabad:
 15 hrs
 (Johannesburg indirect)

Mumbai:
 12 hrs
 (Johannesburg indirect)

Delhi:
 13 hrs
 (Johannesburg indirect)

There are **no direct
 air routes** from **India**

and limited capacity on connecting flights and tourists connect either through **the Middle East or East African hubs** and **Indian Ocean Islands**



LAND MASS
3 287 263km²



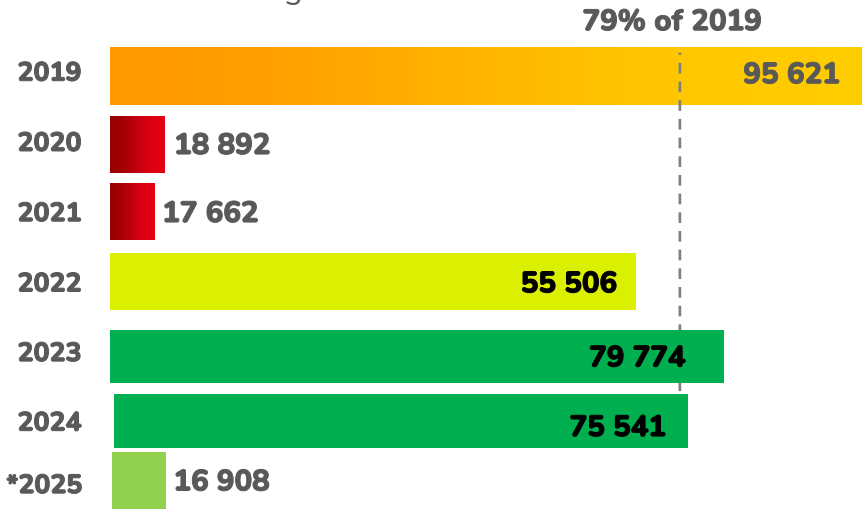
The 2024 recovery in travel from India **peaked in May** with **11 695** arrivals which is double the average arrivals from India.

Overall in 2024, the market recovered to **79%** of the pre-pandemic tourist arrivals levels in 2019

In 2024 the Rand strengthening against the Rupee had an impact on average spend per tourist which contracted slightly as South Africa became relatively more expensive. On average tourists spent **R20 200** in 2024 down from R22 600 in 2023.



Overall Indian tourists spent **R1.3 billion** in 2024 down slightly from the previous year when spend and arrivals were higher.



* Arrivals 2025 year to date – Jan to March 2025



14.4 million

INDIA'S
LONG-HAUL
MARKET SIZE

0.4%

South Africa's share of
India's long-haul outbound



Competition for the Indian market



The brand performance in India needs to improve with relatively low brand awareness of tourism offerings when compared to competitors.

Sources: SAT Departure Survey; Forward Keys, Brand Tracker, Oxford Economics, Stats SA, Insights Activator

South Africa's competitive advantage in the mind of the Indian market is relatively well-known and offers **wildlife experiences**

Indian consumer profile

Indian travellers



Tourists tend to make travel decisions and book within one month of travel to South Africa (59% in 2024)



Their source of travel information is primarily from **business associates and personal experience**



Indian tourists rely on their networks (both personal and business), **travel aggregators, OTAs, and social media** for information



The majority consider themselves to be **independent travellers** (65% in 2024)



Business investments, visiting friends, exploring opportunities and wildlife safari are the top reasons to visit SA



Self-catering units have the longest length of stay, while **Hotels and staying with friends and relatives** have the most bednights



The average length of stay has dipped to 16 nights in 2024 from 19 nights in 2023. This has been contracting post-pandemic from 26 nights in 2019



Indians predominantly **travel alone** or with colleagues, or a spouse/partner



In 2024 the 35+ age groups are the drivers of recovery and have grown to surpass the under 35 age group which was majority in previous years



Indian tourists are staying for slightly shorter periods than before the pandemic, but spending slightly more (average spend R20 200) than 2019



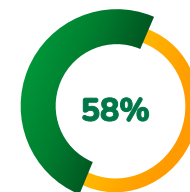
Hotels are the leading accommodation type in 2024, and this is ahead of VFR nights



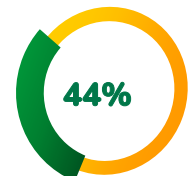
Indian tourists spend the most on Shopping and Food in total, and Accommodation is the top spend category per tourist

Bookings made by employer or company

Accommodation



Flights



Indian tourists are interested in a variety of attractions. Preferred attractions:



Sandton City



V&A Waterfront



Cape Town City Centre



Cape Point



Camp's Bay

Activities of choice



Shopping



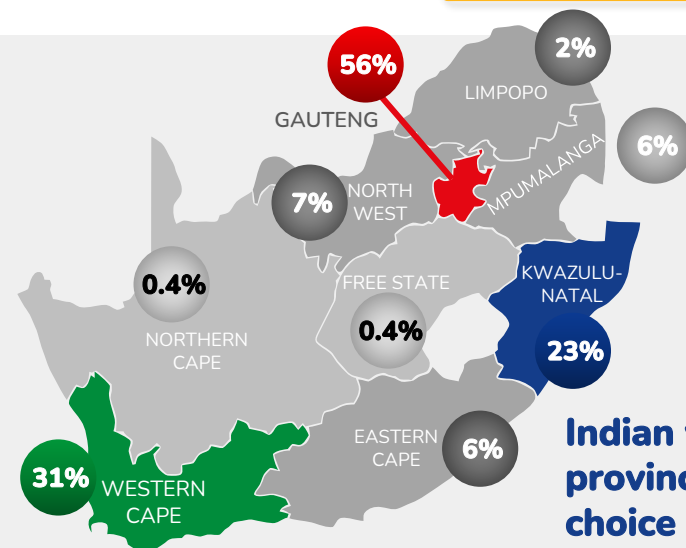
Eating out



Visiting nature



Business



Indian visitors' provinces of choice

Indian segment profiles



1. Seasoned status seeker

Seasoned status seekers are experienced travellers who look to derive the most out of new destinations. They prefer having a full itinerary comprising a wide range of activities that allow them to explore new places while still enjoying some family time away from their usual busy lives.

Example: A 44-year-old, high-level professional, married with two children. Travels internationally twice or three times a year with close or extended family. Makes travel decisions with a partner and uses holiday time as an enriching experience. Likes to experience different cultures and heritage and welcomes a bit of adventure.

Priorities: A variety of activities, including shopping and visiting natural attractions

Appreciates South Africa's natural beauty, beaches and culture



2. Social explorer

Travelling allows social explorers to be free and unrestricted while exploring new places and engaging in exciting activities. If single, they relish meeting new people and visiting pubs and clubs and participating in adventure sports. If married, would be looking for more romantic destinations.

Example: A young, hard-working graduate professional in their 20s and early 30s. Travels internationally once or twice a year. They would be attracted to places like Cape Town (as recommended by friends) for its nightlife, as well as natural beauty, wildlife, and beaches.

They are keen to get out of India during the hot months (May and June). Travel plans have to fit around budgets and limited leave availability.

Priorities: Experiencing fun, freedom and a relaxing time

Appreciates South Africa's natural beauty, diverse culture and lifestyles



3. Young family adventurers

Travel is a way for young families to bond while exploring new cultures and places. It also offers them a chance to spend time away from their busy and stressful daily lives, relaxing and rejuvenating.

Example: Young married in their early 30s, with a young child or two. A hard-working IT professional who is up to date on world news and works irregular hours due to having a client base in the United States. Travel offers a way to reconnect with family, explore new horizons and experience different cultures and traditions. Holidays are also a time to relax and recharge.

Friends have recommended Cape Town for shopping and tourist attractions like Table Mountain and the Two Oceans Aquarium.

An experienced traveller's holidays need to work around budgets and limits to time off. Happy to leave India in the hot summer months of May and June.

Priorities: A beautiful place with opportunities to relax and be close to nature, enjoy adventure activities, heritage and culture, as well as wildlife, theme parks and shopping

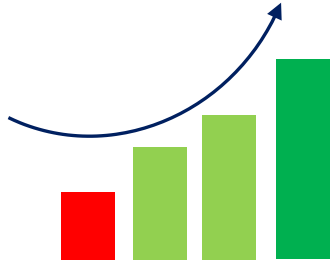
Family safety and security are important concerns

Key insights

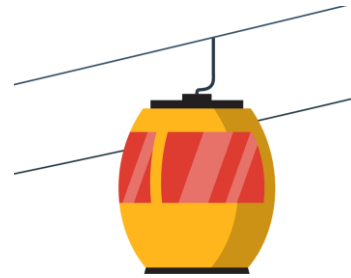
South Africa's rich **cultural diversity** resonates with this market, especially as Indian culture is an integral part of it. The focus should be not only on what sets us apart, but also on the shared **connections that bring us closer**.



Many Indian travellers are not yet fully aware of the **diverse experiences** South Africa offers, including its rich natural attractions and opportunities for relaxation—highlighting a **valuable opportunity** to better showcase the destination's full appeal.



Indian tourists are among the top recovery markets in **Asia**. India's growth as a tourism market for South Africa is well ahead of the regional growth rate



The misperception in the Indian market is that South Africa does not offer a **variety of experiences** and this needs to be addressed in messaging and itineraries



Getting to South Africa: the countries are a long distance from each other, and travel links can be complicated



South Africa's relatively **low scores** on the **Brand Tracking elements** suggest that the Indian market is unaware of what the country offers



South Africa offers **cooler weather** during India's **hot months, which appeals to travellers**



A large Indian community exists in South Africa, which is a drawcard (especially for Indian visitors hoping to enjoy Indian cuisine)

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SOUTH AFRICAN TOURISM

