

INDIA

INTERNATIONAL MARKET UPDATE 2025

MARKET OVERVIEW

- India is South Australia's 6th largest inbound market and is ranked 3rd for expenditure as of June 2025.
- Key demand driving experiences include nature and wildlife, shopping, coastal and aquatic, food and wine.
- Australia is considered a 'highly aspirational' destination with natural landscapes and wildlife, with a wide range of experiences appealing to families and couples.
- As cricket is the most popular sport in India, Indians have a strong awareness of Adelaide Oval, which provides a basic reference point.
- 66% of Indian visitors to South Australia have been to Australia before.
- Currently 64% of all Indian visitors to South Australia are here on a Visiting Friends and Relatives (VFR) purpose trip, making it the most dominant purpose of visitation. VFR travellers should not be underestimated, and most are keen to experience the destination whilst visiting their friends and family.
- Whilst the market has traditionally been drawn to the East Coast of Australia, agents and consumers are gradually becoming more adventurous and seeking out new experiences in Australia.
- There is an emerging luxury segment in India. Currently this is small volume, but will continue to provide a growth opportunity.
- Indian travellers often need flexibility due to the size of group travelling. Where you can deliver flexibility, it will be well appreciated. If you have specific timings you need to meet, make your cancellation policies very clear so that any penalties are well known to those travelling.



FAST FACTS & FIGURES


Data is an annual average over 2 years ending June 2024-June 2025

INDIA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	6,000	16,000	2,000	5,000	27,000
VISITS (AUS)	98,000	270,000	41,000	80,000	412,000
NIGHTS (SA)	46,000	1,006,000	19,000	809,000	1,880,000
NIGHTS (AUS)	941,000	15,687,000	641,000	10,173,000	27,442,000
ALOS - NIGHTS (SA)	8	63	9	149	70
ALOS - NIGHTS (AUS)	10	58	16	128	67
EXPENDITURE (SA)					\$125m


ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.
#A HIGH AVERAGE DUE TO VFR.

SNAPSHOT OF CURRENT STATISTICS – JUNE 2025


VISITORS

 23k


NIGHTS

 1.69m[#]


AVERAGE LENGTH OF STAY

 74 nights[#]


EXPENDITURE

 \$139m

AVERAGE SPEND

 \$82 per night \$6,078[#] per visitor

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 #6 for visitors
#2 for nights
#3 for expenditure

AIR ACCESS

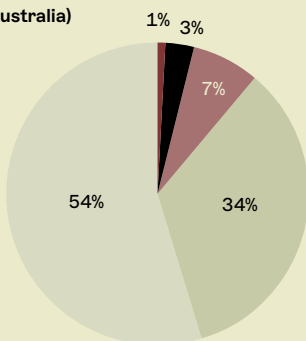
KEY CONNECTING AIRLINES

- Singapore Airlines (SQ)
- Cathay Pacific (CX)
- Malaysia Airlines (MH)
- Qatar Airways (QR)
- Emirates (EK)
- Qantas Airways (QF)
- Multiple airlines offering connections via other Australian airports

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS*

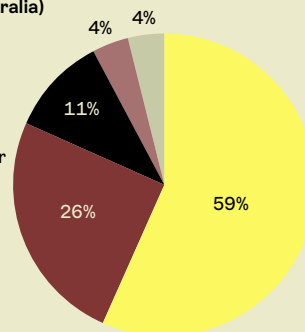
Visitor accommodation type (in South Australia)

- Other private accommodation
- Hotels and similar accommodation
- Other accommodation
- Rented house/apartment/flat/unit
- Friends or relatives property



Travel party description (to South Australia)

- Travelling alone
- Adult couple
- Family group - parents and children
- Friends or relatives travelling together
- Other travel party



MARKET INSIGHTS

- Indians living in Australia are highly influential, and their impact on itinerary planning should not be underestimated.
- Indian travellers can be value conscious, so consider how you can make price and inclusions more attractive. Some examples include kids stay/eat free, small gift/value add, bundling attractions or stay 3 nights pay two nights.
- Developing relationships with key trade at events such as the Australian Tourism Exchange (ATE), Tourism Australia's Marketplace, G'Day Australia and other trade events and missions is critical for business success. Invest the time and be remembered.
- It is likely within a group of Indians there will be a variety of dietary requests. Many Indians are vegetarian and there are many different types of vegetarianism common in India. Halal is another dietary requirement among some Indian travellers to be mindful of.
- Indians often prefer to eat late dinners. Hot meals are always preferred.
- India has many festivals throughout the year and recognising an important religious festival will be appreciated by travellers.
- Provide clear and visible information on the location and opening/closing hours of nearby key shopping areas. This includes the locations of discount/outlet shops and centres if nearby.
- Most travellers from India are now granted a three-year visa, which allows multiple entries. This creates an excellent opportunity to capture repeat visitation and wider dispersal.

FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA*



63%

Clean cities, good roads and signposts



60%

Friendly and welcoming citizens



59%

Vibrant cities



58%

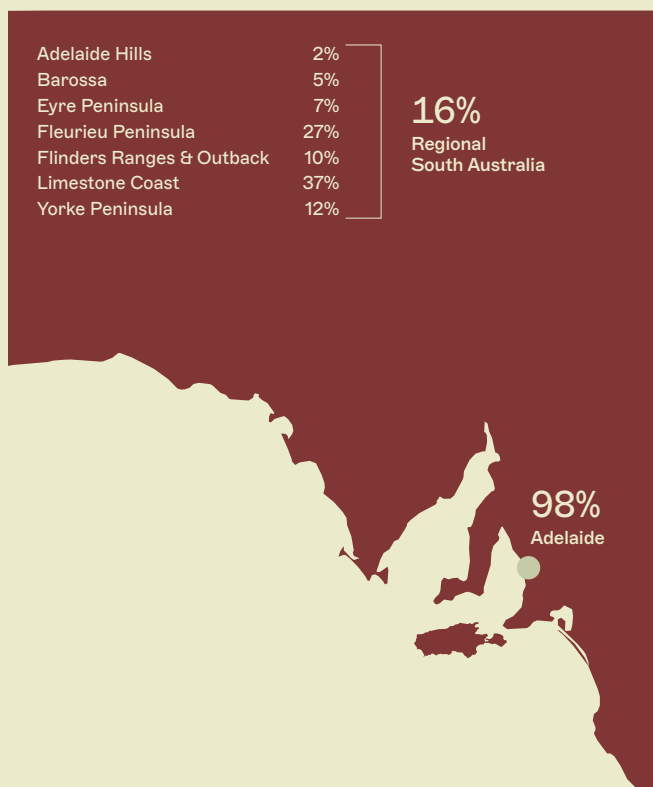
A range of quality accommodation



46%

World-class beauty and natural environments

VISITOR DISPERSAL**

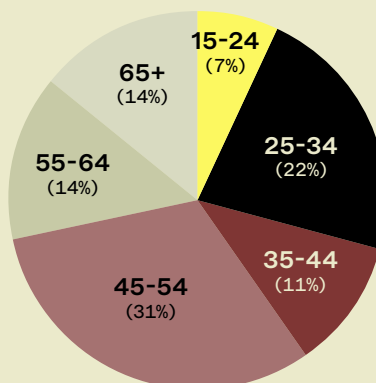


TARGET MARKET PROFILE



South Australia targets the 'high value traveller' including families and honeymooners in the affluent middle class from key cities including Delhi, Mumbai and Bangalore.

INDIAN VISITORS TO SOUTH AUSTRALIA BY AGE GROUP*



*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.
+DATA INCLUDES VISITORS WHO TRAVELLED TO MULTIPLE REGIONS FOR ALL PURPOSES.

BOOKING PREFERENCES



58%

Online Travel Agent
(eg. Expedia)



34%

Direct with Airline



36%

Retail Travel Agent/
Tour Operator



27%

Direct with
Accommodation



11%

Direct with
Experience Provider



1%

Other

INDIA CHECKLIST

Consider the following points when targeting travellers from India:

- ✓ As a strong VFR market, the local Indian community can have a huge influence on the travel plans of their visitors. Targeting this market first could provide an efficient entry point into the market.
- ✓ If food is part of your offering, note that many Indians are vegetarian and even non-vegetarians will often only eat some meats. They prefer hot meals and generally eat late. Checking (and double checking) dietary requests and preferences is strongly recommended.
- ✓ The Inbound Tour Operators (ITOs) who service the market are a critical link in the chain and collectively service thousands of agents across India. Engaging them as a first step is important to target the holiday segment.
- ✓ Indian visitors rarely visit one state and they're likely to be combining South Australia with at least one or two more states. They are limited on time so make it clear why they must include your product in their itinerary. Be uniquely South Australian.
- ✓ Be prepared for buyers to want to negotiate on the rate. This is a normal course of doing business in the market.
- ✓ The corporate incentive market is a growing opportunity and operators interested in this segment are encouraged to speak further with Business Events Adelaide.

KEY TRADE PARTNERS

INBOUND TOUR OPERATORS

The ITOs who service the market highly influence product selection. They often have offices both in Australia and India and service the trade right across the market. Any operators interested in the market should be engaging with the ITOs as a first step. Below is a list of some of the key ones but this grows and changes regularly.

- Australia & Beyond Holidays
- AOT Inbound
- Australia & Worldwide Travels
- ATM
- Pacific Vacations Australia
- Travel Maestro Inbound
- Turtle Down Under
- Xplore Australia

IN-MARKET KEY DISTRIBUTION PARTNERS

As defined by Tourism Australia, the Key Distribution Partners are as per below. Whilst this is a useful reference point, it is important to note that the Indian travel trade is characterised by hundreds of small agents – too many to name in this document – each who have the ability to send small numbers to Australia. It is these smaller agents who may have more appetite to put forward itineraries to Australia that go beyond the East Coast cities.

- Flamingo Travels
- Kesari Tours
- Kulin Kumar Holidays
- Makemytrip.com
- Pickyourtrail.com
- SOTC
- Thomas Cook India Ltd
- Veena World

TOP TRAVEL WEBSITES AND APPS



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Government of South Australia
South Australian Tourism Commission



*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025. ** CURRENTLY SMALL BUT GROWING MARKET PRESENCE.
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