



India: Tourism Market Insights

June 2026

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1. Key Insights

1. Key Insights & Executive Summary

1. Indian travel market

India's outbound travel is growing rapidly with 29 million outbound trips in 2025 that reflected an almost 10% year-on-year growth. By 2030 Leisure air travel is projected to grow by 102.86%, while business travel shows more fluctuations. The country represents a fast-growing outbound travel market with strong potential for the Western Cape and Cape Town, especially in leisure, luxury, cultural, adventure, and family travel segments.

Targeted marketing, improved connectivity, and curated experiences can help South Africa capture a larger share of this market.

2. Key factors driving outbound travel growth: Traveller preferences & trends:

- **Top priorities:** In 2025, safety and security were primary concerns for many Indian travellers and these factors influenced 24.64% of travellers in their decision making. Some 22.26% of travellers participated in nature and outdoor activities; while 22.61% of travellers enjoyed family-oriented experiences and 21.27% were focused on relaxation.

Generational trends: include the following:

- **Gen Z** – These travellers are tech-driven and are focused on eco adventures, and experiences.
- **Millennials** – This is the largest digital travel segment; they are luxury seekers and participate in eco-trips.
- **Gen X** – This generation is digital-savvy, luxury seeker, eco-conscious.
- **Baby Boomers** – They are strongly eco-conscious, leisure and adventure travellers.

Competitor Destinations

- South Africa ranked 38th among Indian travellers globally in 2023 and 2024 and dropped to the 39th position in 2025.

Top global destinations for Indian travellers

- The Americas: The United States of America (USA), Canada, Mexico, Panama, Brazil.
- Western Europe: France, United Kingdom (UK), Portugal, Switzerland, Turkey.
- Eastern Europe: Czech Republic, Georgia, Hungary, Serbia, Croatia.
- Africa: Egypt, Kenya, South Africa 3rd, Ghana, Tanzania.
- Middle East: United Arab Emirates (UAE), Saudi Arabia, Qatar, Oman, Jordan.
- Asia: Thailand, Malaysia, Singapore Indonesia, Vietnam.

1.1.3 Indian tourism trends in South Africa & Western Cape (2025)

- Top age groups visiting SA: 41–50, 31–34, 35–40 years.
- Top activities: business, casinos, natural attractions, theme parks, and education.
- Top purpose: business; meetings, incentives, conferences and exhibitions (MICE); and visiting friends and relatives.
- Accommodation preference: visiting friends and family, hotels, and self-catering establishments.
- Some 46.0% were first-time visitors to South Africa.
- The Western Cape ranks second after Gauteng in attracting Indian tourists.
- Seasonality peaks are in May–June and September–November, highlighting winter and spring travel opportunities.

Sources: Wesgro Insights (2025); South African Tourism (2025); Tourism Economic (2025/26); Euromonitor International (2026)

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1.2 Objectives and Methodology

Objectives

Market research in the tourism sector is essential for gaining insights into travellers' preferences and behaviours, which can be obtained from examining various factors such as economic conditions and cultural influences. It also plays a crucial role in identifying emerging markets and monitoring the performance of the tourism industry (SIS International Market Research, 2025).

This report offers valuable insights into India's tourism economy, outbound travel and consumer trends. In addition, it provides an overview of the number of tourist arrivals in South Africa and the Western Cape, as well as air travel connections.

Methodology

To compile this report, a mixed-method approach involving a combination of secondary quantitative data and secondary research was employed to gather trends and insights into the Chinese traveller market. Various research sources were referenced, including international and national databases and travel industry reports.

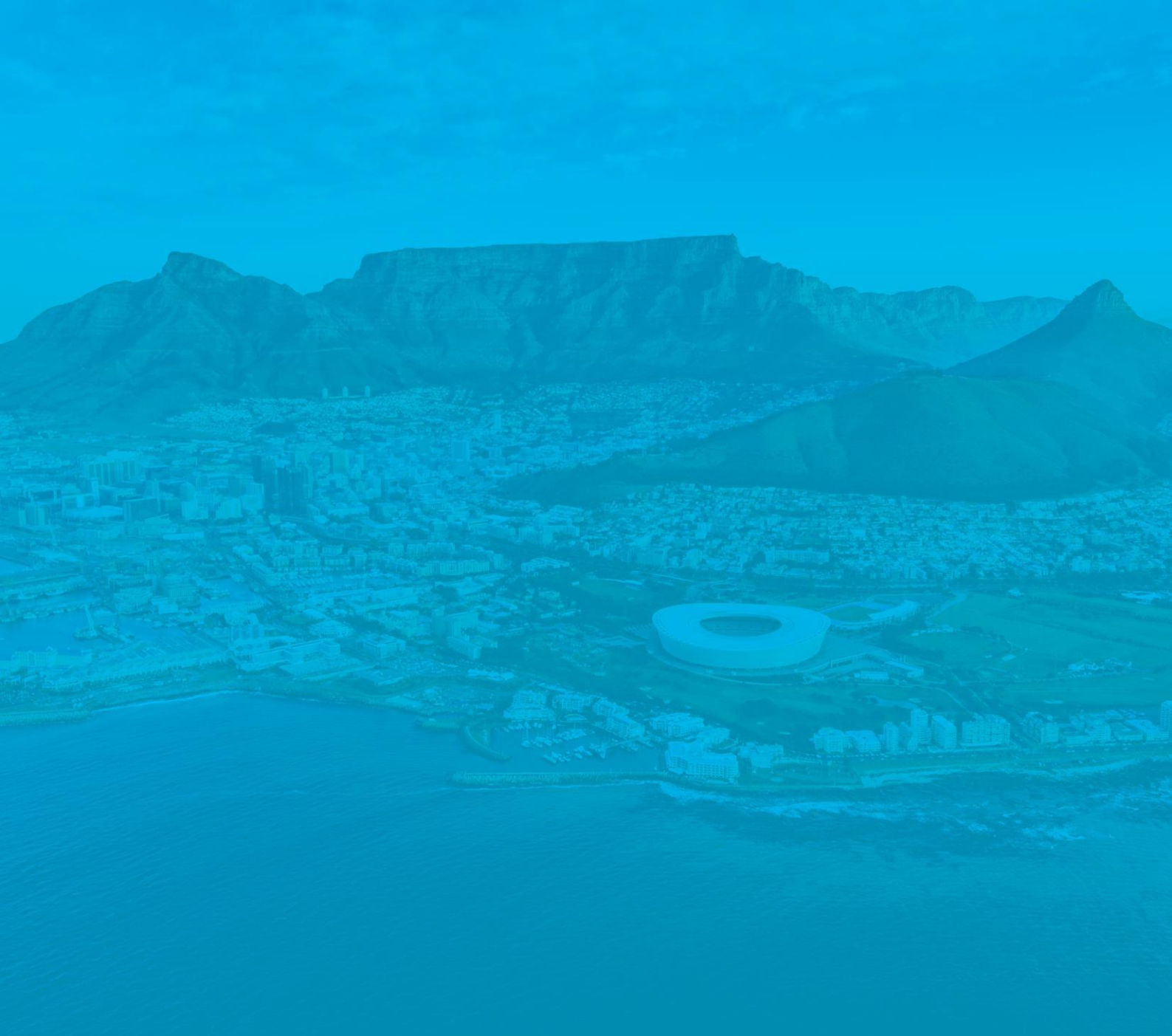
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1.3 Definitions

- **Outbound tourism spending** – Refers to the amount paid by residents of the country of reference for the acquisition of goods and services, including transport, for and during trips abroad. All spending that is made in the destination is included. Trips that are over 24 hours are included; however, day-trippers and transit passengers are excluded.
- **Outbound departures** – The number of outbound trips by residents of the country of origin to the destination country, excluding day trips.
- **Business outbound air travel** – International trips by residents for business purposes including unmanaged and managed, and MICE – meetings, incentives, conferences and exhibitions. Outbound air departures include scheduled airlines, charter and low-cost carriers.
- **Leisure outbound air travel** – All international trips by national residents for leisure purposes including recreational trips/holidays, visiting friends and relatives, and other purposes (such as sports, education, medical, shopping, religion etc). Outbound air travel includes scheduled airlines and non-scheduled airlines.
- **Travel & tourism** – The activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured in the research.
- **Direct contribution to gross domestic product (GDP)** – Refers to GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists.
- **Total contribution to employment** – The number of jobs generated directly in the travel and tourism sector, plus the indirect and induced contributions.
- **Visitor** – Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for travel is other than the exercise of an activity to be remunerated at the place visited.
- **Same-day visitor** – Any person who visits a place without staying the night.
- **Tourist** – A visitor who stays at least one night in the place visited.
- **International tourist** – An international visitor who stays at least one night in collective or private accommodation in the country visited.
- **Overnight trip** – A journey undertaken by one or more members of the household for at least one night away from home, where the persons travelling did not receive any remuneration (did not make any profit) at the destination. For a trip to be complete, the person must return to his/her place of residence.
- **TFDS** – Stands for total foreign direct spend within South Africa. When reported, it excludes the component spent on capital goods.
- **Average spend** – The spend per tourist, obtained by dividing the total direct spend by the number of tourists.
- **Bed nights** – A measure of occupancy representing the total number of nights in which tourists stay in South Africa.
- **Length of stay** – The duration of time that a visitor or tourist spends at a destination or in the country; in this survey, it is calculated by dividing total bed nights by the total number of tourists.
- **Origin market** – Refers to the departure location of the travellers' air itinerary. The city of departure is the "origin city".
- **Tourist arrivals** – Arrivals of travellers staying overnight at the specified destination. When the destination refers to a country, the arrivals count each step within its territory that includes an overnight stay.
- **Historical data** – Refers to arrivals in a past period, in relation to the database update date considered in the analysis.



2. Overview of the Indian Travel Market

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2.1 About India

Where is India?	India is located in southern Asia, on and around the piece of the continent known as the Indian peninsula. The country borders Pakistan, China, Nepal, Bhutan and Bangladesh.
Total population	1.46 billion (June, 2025).
Language(s)	Hindi 43.6%, Bengali 8%, Marathi 6.9%, Telugu 6.7%, Tamil 5.7%, Gujarati 4.6%, Urdu 4.2%, Kannada 3.6%, Odia 3.1%, Malayalam 2.9%, Punjabi 2.7%, Assamese 1.3%, Maithili 1.1%, other 5.6%; English is the subsidiary official language but is the most important one for national, political, and commercial communication (2011 est.)
Religion	Hindu 79.8%, Muslim 14.2%, Christian 2.3%, Sikh 1.7%, other and unspecified 2% (2011 est.)
Time difference	India is three & a half hours ahead of South Africa
Total contribution from travel and tourism to GDP and jobs	<p>Based on the latest Economic Impact Research by the World Travel & Tourism Council (2025), India has emerged as one of the fastest-growing and dynamic travel and tourism markets globally, demonstrating strong recovery trends and significant long-term growth potential.</p> <ul style="list-style-type: none">• In 2025, India's travel and tourism sector was projected to generate approximately 48.2 million jobs, accounting for 9.4% of global employment.• The sector's total economic contribution in 2025 was expected to reach USD 268.7 billion, representing 6.6% of the national GDP and surpassing pre-pandemic levels by 29.2%.• International visitor spending was forecast to reach USD 38.8 billion, exceeding pre-pandemic levels by 15.1%. This indicates sustained recovery in international tourism demand.• Domestic visitor spending was projected to reach USD 200.8 billion in 2025, reflecting a 32.2% increase compared to 2019 levels, which suggested that domestic tourism continued to play a critical role in driving sectoral growth and resilience.
Climate	The climate varies from tropical monsoon in the south to temperate in the north.

Sources: CIA World Factbook (2025); World Bank Group (2025); Euromonitor International (2024), WTTC (2025), Times of India (2025).

2.2 Outbound air travel market trends (2024–2030)

Data collected from Euromonitor International (2025), indicates that in 2025, India's total outbound departures reached 29 million.

Of the 29 million outbound trips recorded in 2025, India's air travel trends showed a year-on-year growth of 9.97% compared to 2024.

Looking ahead, it is projected that outbound air travel will increase gradually over the coming years reaching an estimated 73.35% by 2030. Leisure air travel shows positive trends with a forecasted growth of 102.86% by 2030, while business air travel shows fluctuating changes during the period, as shown in Figure 1 below.

According to Bennett Coleman and Company Limited (2025), the Indian traveller is a seeker of knowledge, culture, spirituality and trade. Indians have traveled and continue to travel to almost every corner of the globe to seek stories and experiences.

India's dynamic and growing middle class has made it one of the most vibrant and in-demand travel markets in the world. The Indian travel industry had an estimated value of USD 53 in 2023 and is projected to grow to USD 97 bn by 2030. (Bennet Coleman and Company Limited (2025)).

Figure 1: India's outbound air departures, 2025–2030F

	Total Air Outbound	Business Air Outbound	Leisure Air Outbound
2024	26,924,628	7,485,382	19,439,246
2025	29,609,273	6,913,100	22,696,174
2026F	33,098,119	7,018,493	26,079,626
2027F	37,049,036	6,586,081	30,462,955
2028F	41,327,992	5,980,643	35,347,349
2029F	46,099,647	5,153,623	40,946,024
2030F	51,329,090	5,288,358	46,040,732

Source: Euromonitor International (2026)

Note: All figures shown for 2026 to 2030 are forecast projections (F).

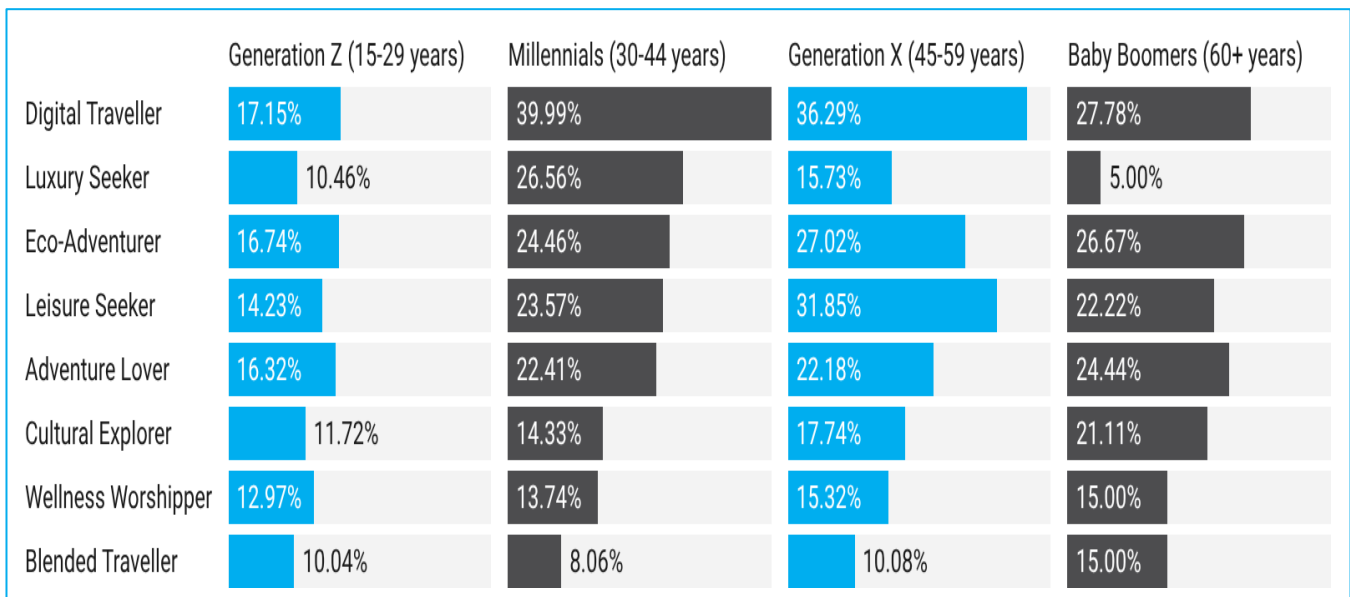
*Air outbound includes outbound trips by residents taken on scheduled airlines, charter or low-cost carriers for business and leisure purposes.

2.3 Trends among different generations

Figure 2 highlights the key travel preferences among Indian travellers across different generations. Digital travel is currently in high demand across all segments, with Millennials showing the strongest engagement with technology at 39.99%.

- Millennials, the largest demographic of digital travellers, tend to seek luxury experiences, prioritise eco-friendly travel options, and focus on leisure-oriented trips.
- Generation X travellers are emerging as digital-savvy, eco-conscious adventurers. They favour immersive experiences and often select destinations that offer both recreation and cultural learning opportunities.
- Baby Boomers are often perceived as less tech-savvy— however, they also represent a significant portion of digital travellers. They too show a strong commitment to eco-conscious travel and leisure experiences.
- Gen Z, the youngest segment, can similarly be described as digital travellers and adventure seekers. Their reliance on technology heavily influences their travel choices, as they actively use apps and social media to discover, plan, and document their journeys.

Figure 2: Indian traveller trends for different generations, 2026



Source: Euromonitor International, Voice of the Travel Consumer Survey (2025b); cited by Wesgro (2026)

Note: Consumer data and insights presented in this section are sourced from Euromonitor International Voice of the Consumer: Travel Survey for the period of 2025. The survey explores the trends that influence consumers' travel habits, personal traits, and decision making when travelling.

2.4 Euromonitor International consumer statistics

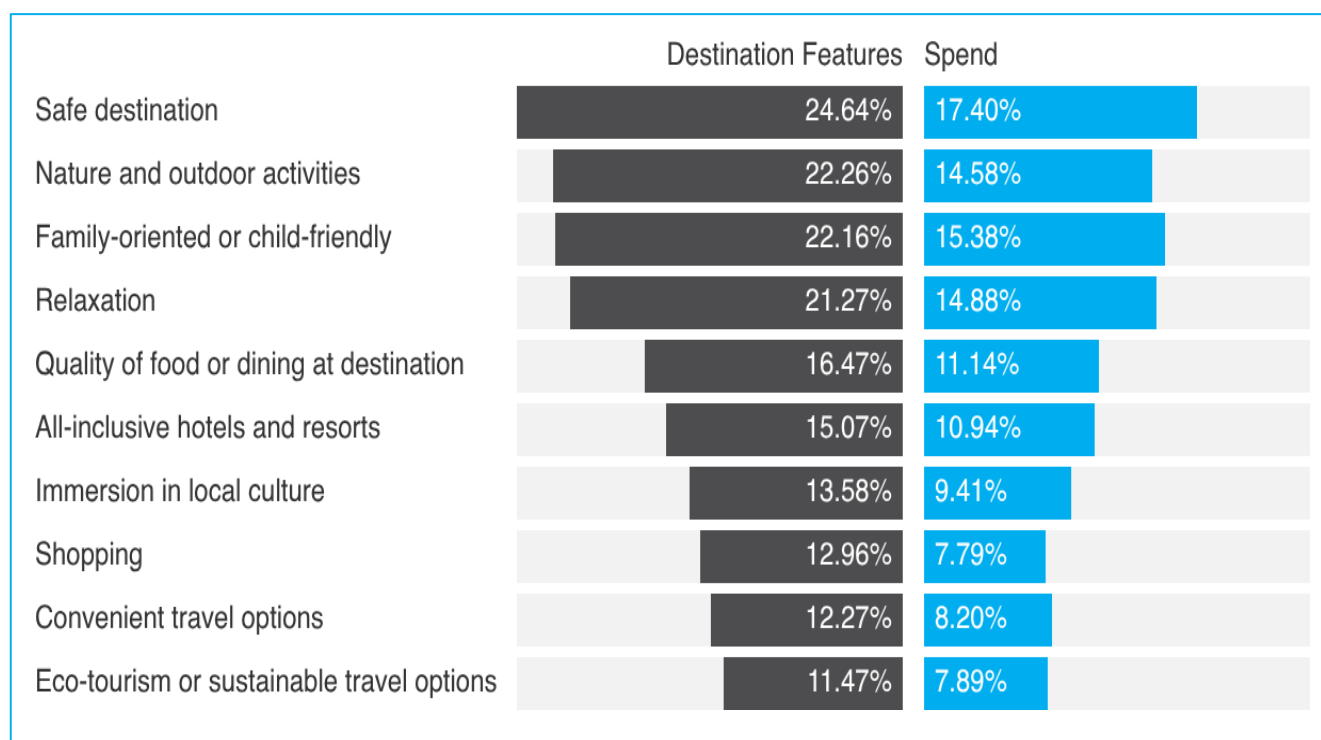
1. Destination features sought by Indian travellers

An analysis of Indian travel preferences – shown in Figure 3 – indicates that safety (24.64%), nature and outdoor activities (22.26%), family-oriented experiences (22.16%), and relaxation (21.27%) were the dominant drivers influencing destination choice. These priorities align strongly with the core tourism assets offered by South Africa and the Western Cape.

Some 16.47% of travellers indicated that the quality of food or dining at a destination was an important consideration.

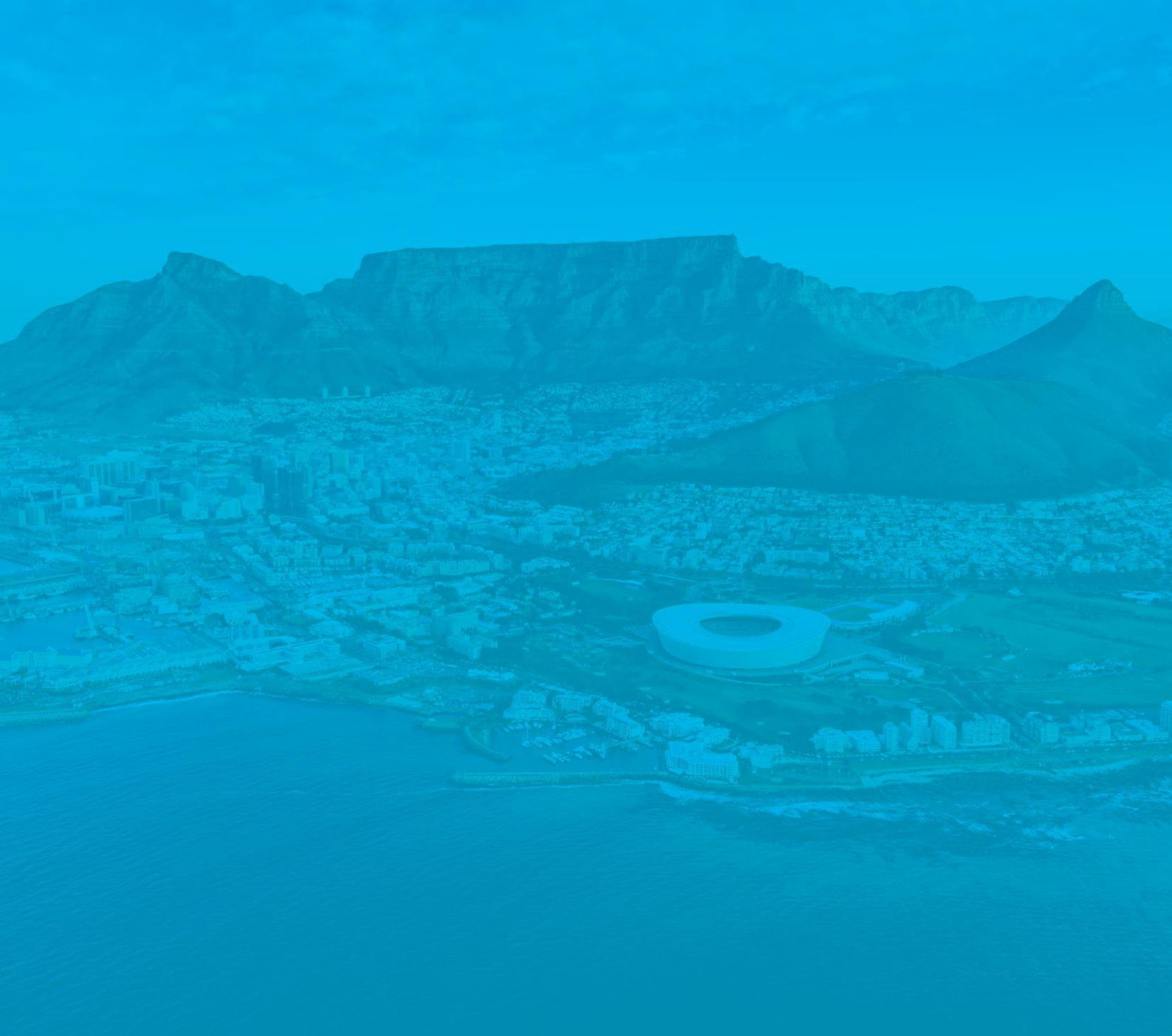
Compared to traditional Indian outbound destinations such as Thailand, Singapore, and Dubai, the Western Cape offers stronger nature-based differentiation, unique wildlife access, high visual appeal for social media influencers as well as competitive luxury travel preferences.

Figure 3: Top 10 most important features in destinations for Indian tourists, 2025



Source: Euromonitor International, *Voice of the Travel Consumer Survey (2025b)*; cited by Wesgro (2026)

Note: Consumer data and insights presented in this section are sourced from Euromonitor International *Voice of the Consumer: Travel Survey for the period of 2025*. The survey explores the trends that influence consumers' travel habits, personal traits, and decision making when travelling.



3. Global Competitor Destinations for South Africa

3.1 Competitor destinations for South Africa

This section analyses the leading outbound destinations for Indian travellers in different continents in 2023–2025. These destinations (illustrated in Figure 4) may be regarded as key competitors for South Africa in attracting the Indian outbound market.

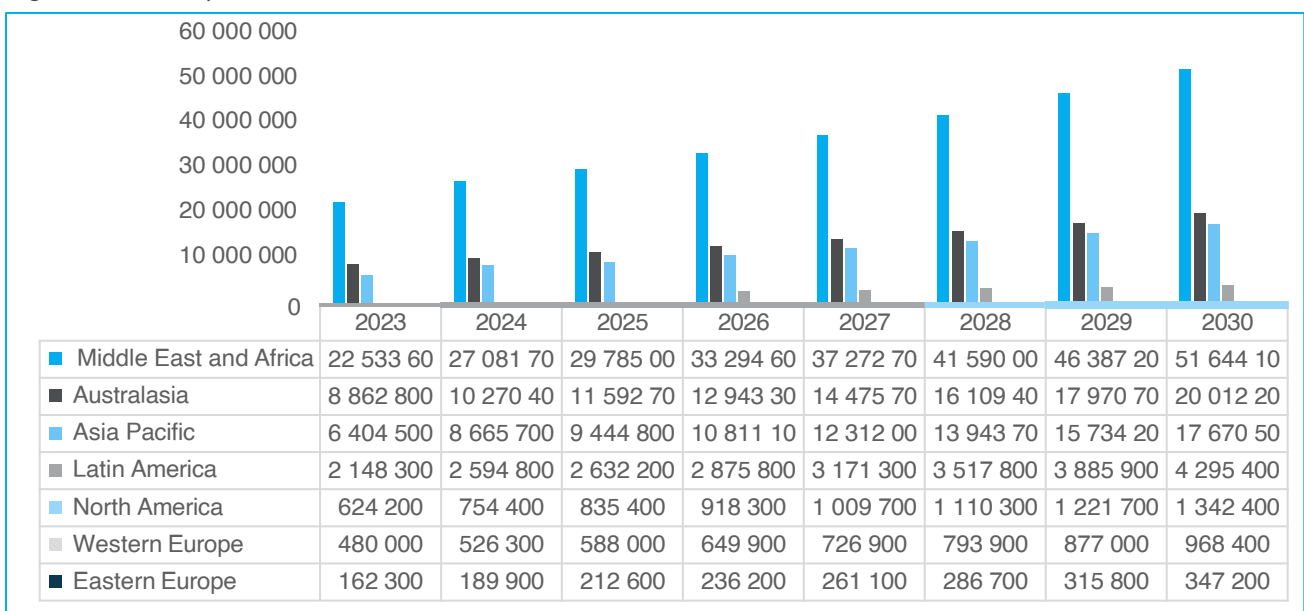
3.1.1 India’s leading outbound travel destinations by continent

Figure 4: India’s top outbound destination continents in 2025



Forward-looking trends and forecasts for different continents in 2023 to 2030 are presented in Figure 5. Countries in the Middle East and Africa emerge as the leading destinations for Indian outbound travellers, followed by the Asia-Pacific region and the Americas comprising both North and Latin America. These trends align with the global outbound market data reflected in the accompanying graph.

Figure 5: India’s top outbound destination continents, 2023-2030F



Source: Euromonitor International (2026)

3.1 Competitor Destinations for South Africa

3.1.2 Most popular countries visited by Indian tourists globally

According to the data from Euromonitor International (2026), which is presented in Table 1, South Africa ranked 38th among the most visited destinations by Indian travellers between 2023 and 2024. However, South Africa dropped to the 39th position in 2025 after being overtaken by Hungary, which recorded 104,600 arrivals. The UAE, USA, Saudi Arabia, Thailand and France consistently maintained positions among the top five destinations from 2023 to 2025.

Table 1: Indian outbound departures: Top five global destinations, 2023–2025

2023	2024	2025
1. United Arab Emirates (5.25 million)	1. United Arab Emirates (6.13 million)	1. United Arab Emirates (6.90 million)
2. United States (1.76 million)	2. United States (2.19 million)	2. Saudi Arabia (2.21 million)
3. Saudi Arabia (1.69 million)	3. Thailand (2.12 million)	3. United State (2.19 million)
4. Thailand (1.62 million)	4. Saudi Arabia (1.96 million)	4. Thailand (2.06 million)
5. France (1.30 million)	5. France (1.24 million)	5. France (1.33 million)
SA ranked in 38th position.	SA ranked in 38th position.	SA ranked in 39th position.

Source: Euromonitor International (2026)

3.1.3 Top outbound destinations for Indian tourists in the Middle East

The top five outbound destinations for Indian travellers to the Middle East between 2023 and 2025 are presented in Table 2. A consistent trend was observed during this period, with the UAE, Saudi Arabia and Qatar maintaining their positions as the top three destinations of interest among Indian travellers. The close proximity and short-haul convenience could be the main reasons for this.

Table 2: India outbound departures: Top five destinations in the Middle East, 2023–2025

2023	2024	2025
1. UAE (5.25 million)	1. UAE (6.13 million)	1. UAE (6.90 million)
2. Saudi Arabia (1.69 million)	2. Saudi Arabia (1.96 million)	2. Saudi Arabia (2.21 million)
3. Qatar (455,400)	3. Qatar (495,200)	3. Qatar (560,400)
4. Oman (177,900)	4. Oman (276,800)	4. Oman (323,500)
5. Jordan (81,800)	5. Iraq (84,900)	5. Iraq (93,300)

Source: Euromonitor International (2026)

3.1.4 Top outbound destinations for Indian tourists in Africa

Table 3 provides insights into the top five destinations for Indian tourists visiting Africa. Egypt and Kenya consistently ranked first and second respectively, across all three years from 2023 to 2025, demonstrating strong and sustained demand. South Africa was in third position throughout the period, reflecting the country's high competitiveness within the African market for attracting Indian travellers.

Table 3: Indian outbound departures: Top five destinations in Africa, 2023–2025

2023	2024	2025
1. Egypt (131,200)	1. Egypt (149,600)	1. Egypt (176,100)
2. Kenya (95,200)	2. Kenya (115,300)	2. Kenya (128,600)
3. South Africa (82,900)	3. South Africa (92,700)	3. South Africa (102,000)
4. Togo (57,100)	4. Ghana (69,100)	4. Ghana (79,200)
5. Tanzania (49,000)	5. Tanzania (66,900)	5. Tanzania (78,300)

Source: Euromonitor International (2026)

3.1.5 Top outbound destinations for Indian tourists in Asia

Table 4 shows insights into the top five destinations for Indian tourists visiting Asia. Thailand, Singapore, Malaysia, Indonesia and Vietnam form the top five outbound destinations enjoyed by Indian tourists in the region. In 2025 Vietnam saw the highest growth in arrivals (35.02%), followed by Indonesia (14.86%) and Singapore (6.59%). Despite Thailand and Malaysia recording higher visitor arrivals, their growth rates were slightly lower than those of other countries.

Table 4: Indian outbound departures: Top five destinations in Asia, 2023–2025

2023	2024	2025
1. Thailand (1.62 million)	1. Thailand (2.12 million)	1. Thailand (2.06 million)
2. Singapore (805,400)	2. Malaysia (1.13 million)	2. Malaysia (1.06 million)
3. Malaysia (671,800)	3. Singapore (936,600)	3. Singapore (998,300)
4. Indonesia (606,400)	4. Indonesia (710,700)	4. Indonesia (816,300)
5. Vietnam (352,900)	5. Vietnam (501,400)	5. Vietnam (677,000)

Source: Euromonitor International (2026)

3.1.6 Top outbound destinations for Indian tourists in Australasia

Table 5 presents data for the two primary countries that constitute Australasia: Australia and New Zealand. Improved air connectivity between India and Australia has played a significant role in stimulating travel demand to the region.

Overall, Indian outbound departures were higher for Indian tourists visiting Australia than they were for New Zealand. A positive growth trend was seen for both countries in 2025, with Australia recording an 11.88% growth rate compared to 2024; and New Zealand with a 10.74% growth rate in 2025.

Table 5: India outbound departures into Australasia, 2023–2025

2023	2024	2025
1. Australia (395,600)	1. Australia (443,500)	1. Australia (496,200)
2. New Zealand (84,400)	2. New Zealand (82,900)	2. New Zealand (91,800)

Source: Euromonitor International (2026)

3.1.7 Top outbound destinations for Indian tourists in the America's

Table 6 highlights the top five outbound destinations for Indian travellers to North and South America. The USA ranked first, followed by Canada, Mexico, Panama and Brazil. These countries also offer diverse travel experiences, including iconic cities, shopping, entertainment and natural attractions.

The appeal of destinations in the Americas is underpinned by strong global branding, mature tourism ecosystems and diversified experiential offerings. These closely align with the preferences of Indian outbound travellers seeking aspirational, multi-purpose travel that combines leisure, business and cultural engagement (McKinsey & Company 2026).

Table 6: Indian outbound departures for top five destinations in North & South America, 2023–2025

2023	2024	2025
1. United States (1.76 million)	1. United States (2.19 million)	1. United States (2.18 million)
2. Canada (385,900)	2. Canada (404,500)	2. Canada (446,100)
3. Mexico (36,700)	3. Mexico (41,900)	3. Mexico (47,600)
4. Panama (14,600)	4. Panama (18,100)	4. Panama (20,100)
5. Brazil (13,100)	5. Brazil (15,300)	5. Brazil (17,300)

Source: Euromonitor International (2026)

3.1.8 Top outbound destinations for Indian tourists in western Europe

Table 7 highlights the top five outbound destinations for Indian travellers to western Europe. France placed first, followed by the United Kingdom, Portugal, Switzerland and Turkey.

Collectively, these destinations also offer a combination of cultural attractions, scenic landscapes, shopping opportunities and well-developed tourism infrastructure, making them highly appealing to Indian outbound travellers exploring western Europe.

Table 7: Indian outbound departures to top five destinations in western Europe 2023–2025

2023	2024	2025
1. France (1.30 million)	1. France (1.24 million)	1. France (1.33 million)
2. United Kingdom (675,200)	2. United Kingdom – (759,500)	2. United Kingdom (854,600)
3. Portugal (308,000)	3. Portugal (361,000)	3. Portugal (396,100)
4. Switzerland (268,600)	4. Switzerland (299,900)	4. Switzerland (327,600)
5. Turkey (254,000)	5. Turkey (267,300)	5. Turkey (297,400)

Source: Euromonitor International (2026)

3.1.9 Top outbound destinations for Indian tourists in eastern Europe

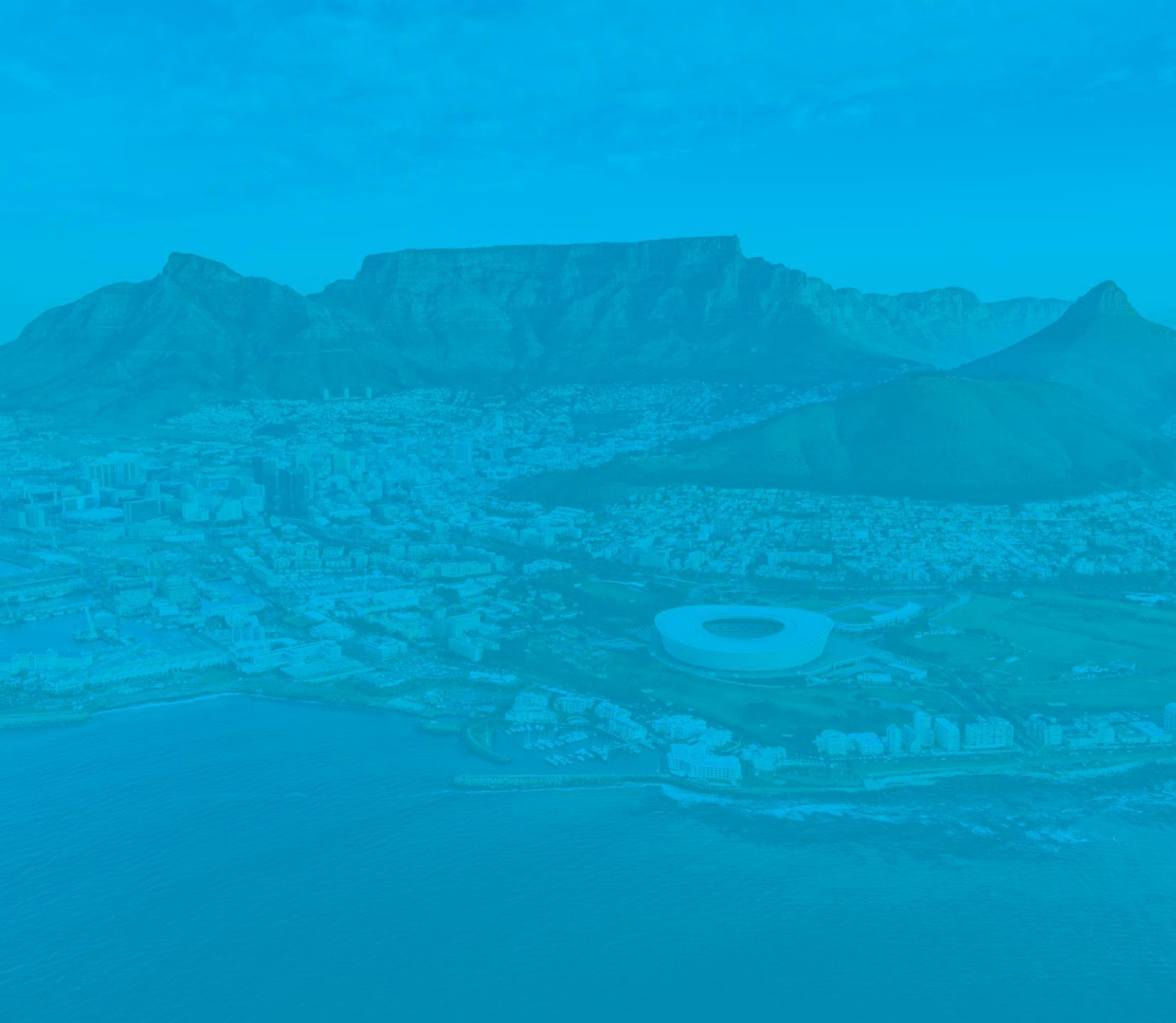
Table 8 highlights the top five outbound destinations for Indian travellers to central and eastern Europe. In 2025 Georgia was the top destination, followed by the Czech Republic, Hungary and Serbia.

The countries attract most of their visitors due to their historic cities and well-preserved architecture. Iconic destinations such as Prague and Budapest, offer a blend of culture, history and vibrant urban experiences, including medieval towns, castles, and natural landscapes (UNESCO, 2025).

Table 8: Indian outbound departures to top five destinations in eastern Europe, 2023–2025

2023	2024	2025
1. Czech Republic (103,600)	1. Georgia (137,900)	1. Georgia (156,700)
2. Georgia (89,700)	2. Czech Republic (118,500)	2. Czech Republic (131,500)
3. Hungary (88,700)	3. Hungary (95,600)	3. Hungary (104,600)
4. Serbia (52,100)	4. Serbia (61,100)	4. Serbia (67,100)
5. Croatia (47,500)	5. Croatia (56,200)	5. Croatia (61,700)

Source: Euromonitor International (2026)



4. Indian Travel Trends in relation to South Africa and the Western Cape

4.1 Tourism highlights: 2024/25

Table 9: Indian Tourism Highlights	
South Africa	Western Cape
Indian Tourist Arrivals	
<p>Jan–Dec 2025: 69 680 -7.76% decrease compared to 2024</p>	<p>Jan–Dec 2025: 16 238 23.30% share of SA’s tourist arrivals -20.56% decrease compared to 2024</p>
Total Foreign Direct Spend (TFDS)	
<p>Jan–Dec 2025: R1.2 billion -3.15% decrease compared to 2024</p>	<p>Jan–Dec 2025: R211.9 million 16.78% share of SA’s TFDS -24.97% decrease compared to 2024</p>
Length of Stay	
<p>Jan–Dec 2025: 17.2 nights 4.5% increase compared to 2024</p>	<p>Jan–Dec 2024: 9.4 nights -3.09% decrease compared to 2023</p>

Note: Data for the provincial length of stay has not been released at the time of publication.

*TFDS – Total Foreign Direct Spend

*SA – South Africa



Top 3 age-groups of Indian tourist arrivals in SA in 2025

- 41 – 50 years
- 35 – 40 years
- 31 – 34 years



Top 3 purposes of visit for Indian tourists in SA in 2025

- Business
- MICE
- Visiting friends & relatives (VFR)



Top 5 accommodation types used by Indian tourists in SA in 2025

- Friends & Family
- Hotels
- Self-catering establishments
- Guest houses
- Bed & Breakfasts



Top 5 activities undertaken by Indian tourists in SA in 2025

- Business
- Hunting
- Theme parks
- Education
- Casino

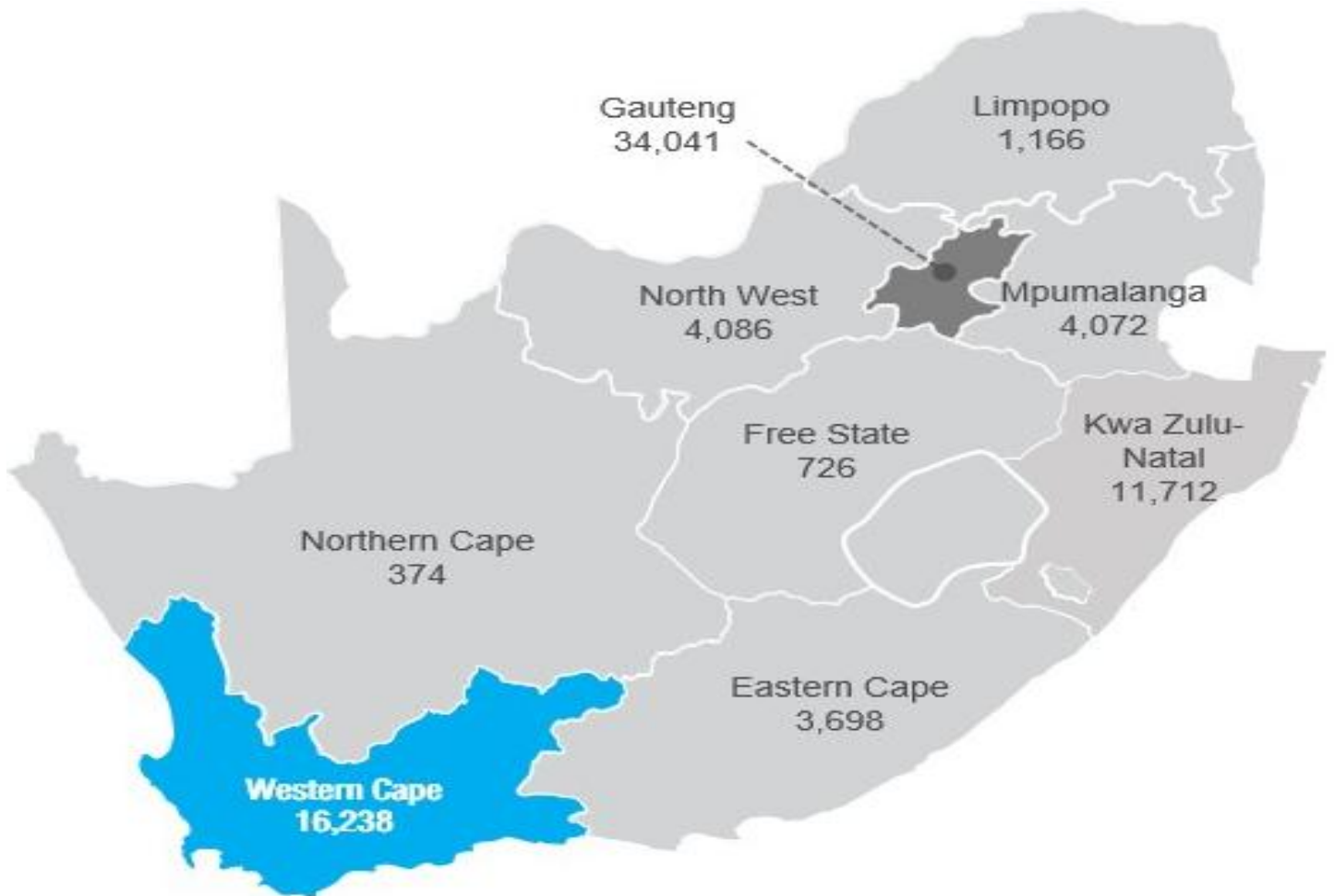


Some **46.0%** of Indian tourists were first-time travellers to South Africa.

4.2 Provincial distribution of Indian tourist arrivals in South Africa, 2025

- In 2025, the Western Cape ranked second after Gauteng as the province of choice for Indian tourists in South Africa. Indian tourists to South Africa travel to OR Tamo International Airport which is located in Gauteng and then they venture into other provinces. This also increases the visitor arrival figures for Gauteng even though the province may be a stop-over destination before travelling to the Cape Town International Airport that is located in the Western Cape. Figure 6 shows the Indian visitor arrivals in the different provinces in South Africa.

Figure 6: Provincial distribution of Indian tourist arrivals in South Africa, 2025



Top five attractions visited by Indian tourists in the Western Cape in 2025:



- V&A Waterfront (Victoria and Alfred Waterfront)
- Cape Town city centre
- Boulders National Park
- Camps Bay
- Cape Point

4.3(a) Indian tourist trends

4.3.1 Indian tourist arrivals in South Africa, Cape Town, and the Western Cape

Figure 7 shows a seven-year trend analysis of arrivals from India in South Africa. In 2025, South Africa welcomed 69,680 tourists from India, representing a slight decline of -7.76% compared to 2024.

The provincial share of Indian tourists who visited the Western Cape from 2019 to 2025 is also provided. In 2019, the Western Cape attracted 52.45% of Indian arrivals in South Africa. This suggests that more than half of the Indian visitors to South Africa during that time were travelling to the Western Cape, highlighting the province's strong appeal before global travel disruptions.

While the market has not yet returned to 2019 levels, the province continues to attract a meaningful share of Indian tourists. Figure 8 shows the average length of stay of Indian tourists in South Africa and the Western Cape from 2019 to 2025.

Figure 7: Indian tourist arrivals in South Africa and the Western Cape, 2019–2025

	Tourists in South Africa	Tourist Arrivals in Western Cape	WC % Share of SA Arrivals	WC Arrivals YoY % Change
2019	95,621	50,157	52.45%	54.52%
2020	18,892	6,093	32.25%	-87.85%
2021	17,662	3,981	22.54%	-34.66%
2022	55,506	14,628	26.35%	267.45%
2023	79,774	23,155	29.03%	58.29%
2024	75,541	20,440	27.06%	-11.73%
2025	69,680	16,238	23.30%	-20.56%

Source: SA Tourism (2019–2026)

Figure 8: Indian tourists' length of stay (LOS) in South Africa and the Western Cape, 2019–2024

	LOS in SA	LOS in WC	WC YoY % Change
2019	26.3 nights	15.0 nights	
2020	28.2 nights	13.9 nights	-7.02%
2021	37.2 nights	14.4 nights	3.31%
2022	20.9 nights	14.4 nights	0.12%
2023	19.3 nights	9.7 nights	-32.46%
2024	16.5 nights	9.4 nights	-3.14%
2025	17.2 nights		

Source: SA Tourism (2019–2026)

*SAT Full year 2025 data for Western Cape length of stay by country has not been released

4.3(b) Indian tourist trends

India has the fourth-largest economy in the world and is also recognised as the fourth-largest global market for travel spending (South African Tourism, 2025).

In 2025, South Africa recorded R1.2 billion in (TFDS) from the Indian market, with visitors spending an average of R22,100 per trip and staying for approximately 17.2 nights. In comparison, visitors to the Western Cape recorded an average spend of R14,300 in 2025, a decline of 1.38% when compared to 2024. This data is presented in Figures 9 and 10.

Figure 9 Indian tourists Total Foreign Direct Spend (TFDS) in South Africa and the Western Cape, 2019–2025

	TFDS in WC	WC % Share of SA TFDS	YoY % Change
2022	R202m	20.41%	*SAT 2021 Provincial data cuts not available
2023	R289.3m	18.65%	43.20%
2024	R282.4m	21.66%	-2.38%
2025	R211.9m	16.78%	-24.97%

Source: SA Tourism (2022–2025); cited by Wesgro (2026)

*SA – South Africa;

* WC – Western Cape

Figure 10: Indian tourists' average spend in the Western Cape, 2022–2025

	Avg. Spend in WC	WC % Share of SA Avg Spend	YoY % Change
2020	13,700	67.82%	*SAT 2021 Provincial data cuts not available
2021	15,800	72.81%	15.33%
2022	10,900	51.42%	-31.01%
2023	13,000	57.52%	19.27%
2024	14,500	71.78%	11.54%
2025	14,300	64.71%	-1.38%

Source: SA Tourism (2022–2025); cited by Wesgro (2026)

*SA – South Africa;

* WC – Western Cape

4. Key opportunities

1. Key opportunities for growth in Cape Town and the Western Cape

- Cape Town and the Western Cape present a range of niche tourism segments with strong potential to attract Indian travellers across different age groups and travel preferences.
- **Cultural and heritage tourism** offers Indian visitors the opportunity to explore the region's rich history, museums, and cultural landmarks, appealing to travellers interested in meaningful and immersive experiences.
- **Bleisure tourism** is also an emerging opportunity, enabling Indian business travellers to extend work trips with leisure experiences.
- The province is well positioned to attract **luxury travellers** from India through its premium accommodation, exclusive wine estates, and high-end travel experiences. **Community-based and township tourism** also provides authentic cultural engagement, allowing visitors to interact with local communities and gain deeper insights into South African culture.
- For younger and experience-driven travellers, **adventure tourism** and **nature-based tourism** present strong opportunities. The Western Cape offers a variety of outdoor experiences such as hiking, marine wildlife encounters and scenic drives, supported by iconic attractions such as Table Mountain and Cape of Good Hope.
- The region's vibrant culinary scene also supports **gastronomy tourism**, with award-winning restaurants and renowned wine regions such as Stellenbosch attracting travellers interested in food and wine experiences.
- **Film tourism:** The Western Cape's diverse landscapes and film-friendly infrastructure present opportunities to attract Indian film productions, particularly from the large and influential Bollywood industry.
- **Family and multi-generational travel:** Indian travellers often travel in family groups, making destinations that offer diverse activities, safety and quality accommodation particularly appealing.
- **Shopping tourism:** Access to premium retail experiences, luxury brands and unique local products can enhance the destination's appeal to Indian travellers.
- Strengthening **air connectivity** between India and Cape Town would significantly improve accessibility and encourage greater visitor flows from the Indian market. In addition, leveraging the world-class facilities at the Cape Town International Convention Centre (CTICC) provides opportunities to attract Indian **MICE** travellers.
- Overall, the diversity of tourism offerings in Cape Town and the Western Cape positions the region well to capture a growing share of the Indian outbound travel market. By leveraging niche segments such as luxury travel, destination weddings, adventure and nature-based tourism, as well as expanding opportunities in MICE and film tourism, the province can appeal to a wide range of Indian traveller profiles.
- Strengthening air connectivity and increasing targeted marketing efforts, as well as enhancing digital engagement in the Indian market, will further support destination awareness and competitiveness. With the continued growth of India's outbound travel market, Cape Town and the Western Cape have strong potential to position themselves as a preferred long-haul destination for Indian travellers seeking diverse, high-quality and memorable travel experiences.

4.5 Targeted Market Segments

Table 9 provides an overview of the market segments identified by South African Tourism, which tourism stakeholders in Cape Town and the Western Cape should consider when tailoring and promoting key tourism offerings and experiences to the Indian market.

Table 9: Identified target segments by SA Tourism, 2025

Segments	Preferences	Travel Motivations	Travel Barriers
Leisure	<ul style="list-style-type: none"> Seeking enriching experiences, and cultural immersion as well as multigenerational experiences. Authenticity and creating memories while using social media to enhance their experiences and share their travel journey. 	<ul style="list-style-type: none"> Value for money, easy & direct travel to South Africa. Access to attractions that they can book separately. Passion as well as word of mouth. 	<ul style="list-style-type: none"> Safety, perceptions about ease of accessibility. Cultural acceptance.
Business travel	<ul style="list-style-type: none"> Convenience, accessibility as well as loyalty programme benefits. Exploring at their own pace while having attractions at close proximity. 	<ul style="list-style-type: none"> Ease of business, quick visa processing. Internationally benchmarked services. Market potential as well as a favourable exchange rate and the diversity of experiences on offer. 	<ul style="list-style-type: none"> Destination accessibility, distance from airport, affordable data packages, tedious red tape.
MICE	<ul style="list-style-type: none"> Large, mid and small-scale events, awards, trade shows. Hi-tech, large venues and inventories. Ease of access, customised itineraries, Handholding, personal attention & assistance, support with group bookings 	<ul style="list-style-type: none"> Unique meeting venues, easy visa processes. Reduced travel times. Ground transport and infrastructure, convenience as well as preferable deals & discounts for venues. 	<ul style="list-style-type: none"> Substandard service. Perceptions about accessibility to vegetables & food. Tedious red tape and lengthy procedures for filming permits.

Source: Adopted from SAT Presentation (2025)



Image Source: Getty Images/Wesgro (2026)



5. Indian Air Travel Trends in Cape Town

1. Getting to Cape Town, Western Cape

1. Indian arrivals in Cape Town via air

Cape Town International Airport recorded a total of 15,962 tourist arrivals from India between January and December 2025 (see Table 10). Historical data shows a peak in arrivals during May and June of 2023, with 3,228 and 2,250 arrivals, respectively. Similar trends were observed in May and June of 2024, when 3,991 and 2,301 arrivals were recorded; as well as in November, with 2,148 arrivals. In 2025, the arrivals peaked in May, totalling 2,721. These seasonal trends indicate a growing interest among Indian tourists visiting Cape Town during May and June, as illustrated in Figure 11.

This presents an opportunity for local businesses, tourism operators, and Cape Town and the Western Cape destination marketing organisations (DMOs) to innovate and adapt their strategies potentially to attract Indian visitors through focused marketing and tailored travel experiences that blend with accessibility, and authenticity.

Table 10: Air arrivals from India in Cape Town, 2019–2025

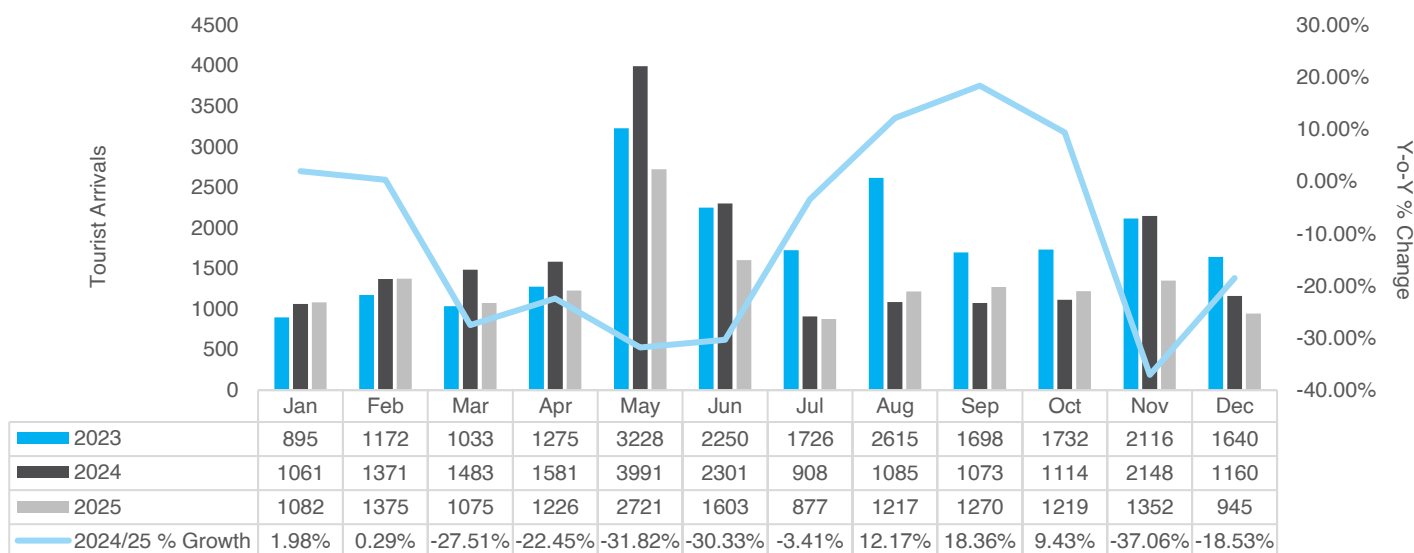
Year	2019	2020	2021	2022	2023	2024	2025
Tourist arrivals	20 124	3 228	1 088	10 817	21 380	19 276	15 962
Y-o-Y % growth	11.5%	-84.0%	-66.3%	894.2%	97.7%	-9.8%	-17.2%

Source: Statistics South Africa (2019–2025); cited by Wesgro (2026)

*Growth compared to the same period in the previous year.

*Note: Stats SA data represents tourist arrivals through Cape Town International Airport and not total passenger movement through the airport.

Figure 11: Seasonality trends of air arrivals from India to Cape Town, 2019–2025



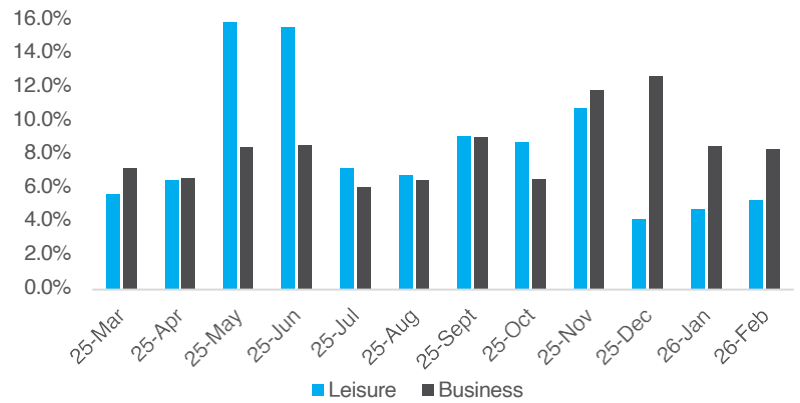
Source: Statistics South Africa (2023–2025); cited by Wesgro (2026)

*Note: Stats SA data represents tourist arrivals through Cape Town International Airport and not total passenger movement through the airport.

5.1.2 Leisure and business seasonality trends

Between March 2025 and February 2026, Cape Town recorded positive year-on-year growth in arrivals from Indian travellers across both leisure and business segments, as illustrated in Figure 12. Leisure travel demonstrated the strongest performance, with peak growth in May 2025 (15.81%) and June 2025 (15.49%). Business travel showed notable increases towards the end of the year, particularly in November (11.79%) and December (12.63%), coinciding with the festive season in South Africa.

Figure 12: Leisure and business arrivals in Cape Town between Mar 2025 and Feb 2026



Source: ForwardKeys (2026); cited by Wesgro (2026)
*Data extracted (10/04/2026)

5.1.3 Marketing Planning

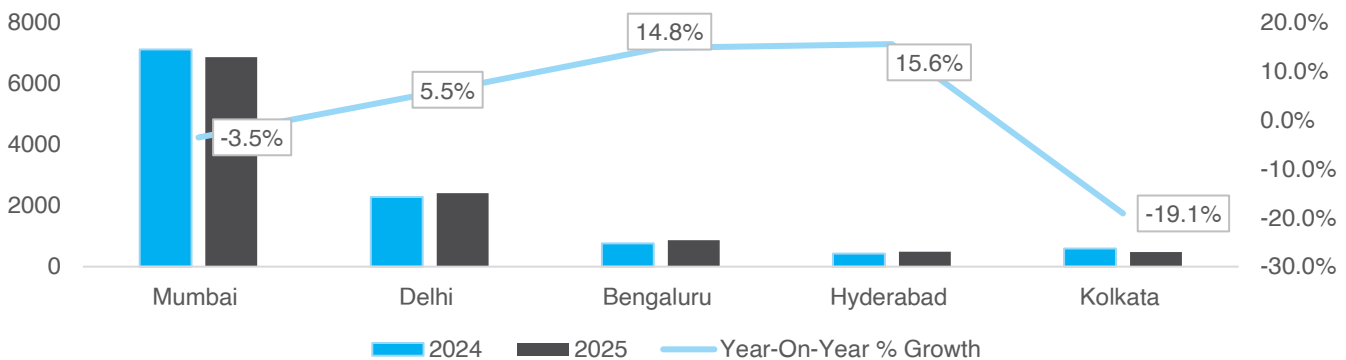
Forward Booking Trends by Indian Travellers	
Average Lead Time for Flight Bookings 54 days	Trip Purpose 82.9% share of leisure trips
Group Size 3 – 5 travellers	Average Length of Stay 10.2 nights

Source: ForwardKeys (2026); cited by Wesgro (2026)
*Period: February 2025 to February 2026
*Data extracted (08/04/2026)

5.1.4 Origin cities for Indian visitors in Cape Town

Figure 13 illustrates the cities of origin for arrivals from India in Cape Town in 2025, highlighting a shift in growth towards emerging markets rather than traditional leaders. While Mumbai remained the largest contributor, visitors from this city declined by -3.5% y-o-y. Visitors from Delhi increased by 5.5% y-o-y, while those from Bengaluru and Hyderabad led with strong increases of 14.8% y-o-y and 15.6% y-o-y, emphasising the growing importance of these cities. In contrast, there was a sharp decline of -19.1% in visitors from Kolkata.

Figure 13: Cities of origin for Indian travellers visiting Cape Town between January and December 2025



Source: ForwardKeys (2026); cited by Wesgro (2026) *Ranking based on volume of tourist arrivals.
*Growth compared to January to December 2024.
*Data extracted (10/03/2026)

Note: Data represented on this slide is sourced from the ForwardKeys (an Amadeus company). Statistics reflected illustrate historical data for tourist arrivals during travel dates between January and December 2025, based on the ForwardKeys Total Air Market (TAM) dataset.

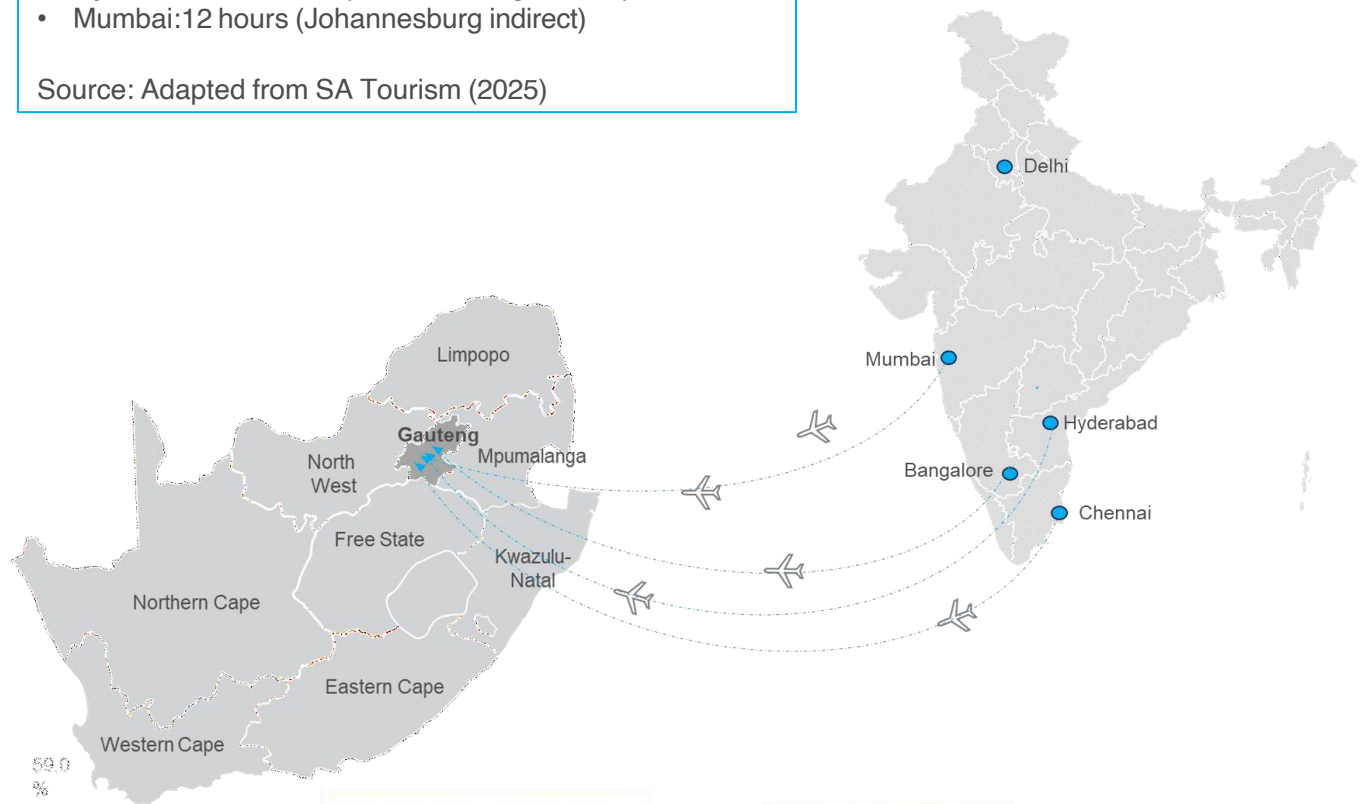
5.2 Getting to South Africa: Flights & Origin Cities

Figure 14 illustrates the estimated travel hours from India, specifically from Chennai, Bangalore, Hyderabad, Mumbai, and Delhi to Johannesburg, South Africa.

Figure 14: Getting to Johannesburg, South Africa:

- Chennai: 14 hours (Johannesburg indirect)
- Bangalore: 16 hours (Johannesburg indirect)
- Hyderabad: 15 hours (Johannesburg indirect)
- Mumbai: 12 hours (Johannesburg indirect)

Source: Adapted from SA Tourism (2025)



Average Ticket Price to Johannesburg South Africa

Average Ticket Price: R8,868 – R12,507) per person



5.2 (b) Getting to South Africa: VISA Requirements

South Africa's Electronic Travel Authorisation (ETA) Process for Indian Travellers South Africa's Electronic Travel Authorisation (ETA) system enables eligible Indian travellers to complete the visa application process entirely online, eliminating the need for embassy visits or paper-based submissions.

The process requires applicants to create an online profile, complete a digital application form, upload passport information, submit a live biometric photograph, pay the applicable fee (if required), and electronically submit their application for assessment (Department of Home Affairs, 2026).

The ETA system has been designed to deliver significantly faster processing times than traditional visa channels. According to the Department of Home Affairs, eligible applicants can receive decisions in real time, while the Department of Tourism has indicated that outcomes may be issued within approximately two hours for completed applications.

Government reports further highlight high approval rates and rapid uptake since implementation (Department of Home Affairs, 2025; Department of Tourism, 2025). The digitisation of visa processing represents a substantial improvement in travel facilitation for Indian visitors, reducing administrative barriers and supporting more seamless travel planning. Faster turnaround times are expected to positively influence destination competitiveness, particularly in India's growing outbound tourism market, where convenience and ease of access are increasingly important destination selection factors (Fragomen, 2025).

Key Process Steps:

- Create an online ETA profile.
- Capture a live biometric photograph.
- Upload passport details.
- Complete the travel application form.
- Submit the application and await approval.
- Travel using the approved ETA linked electronically to the passport.
- Processing times: typically real-time to within a few hours for completed applications, with most applications processed within 24 hours



Scan the QR code to access the official Department of Home Affairs ETA portal for information on eligibility and online applications.



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