

# INTERNATIONAL MARKET PROFILE

INDIAN HIGH VALUE TRAVELLERS

May 2025

# UNDERSTANDING THE INDIAN HIGH VALUE TRAVELLER\*

THIS REPORT PROVIDES A SNAPSHOT OF THE KEY INSIGHTS,  
FURTHER DETAIL IS AVAILABLE IN THE FULL REPORT

## Why did we do this work?

India is a key market for tourism, with rapid growth expected in the coming years. It has also recovered well from the pandemic compared to other markets. While Australia is popular among Indian travellers, Tasmania is often overlooked.

This report explores how Tasmania can attract high-value Indian travellers to increase visitor spending by ensuring we have a deep understanding of their travel motivations, needs, barriers and current behaviours.

## How did we do this work?

We ran a 15-minute online survey with ~1000 high value travellers living in major cities in India in Sept 2024.

We also spoke to an additional 34 high value travellers in online focus groups and one-to-one interviews to dive deeper.

*\*High Value Traveller Definition: Household income of \$100,000+ and spends over \$250/day each on accommodation, transport and leisure while travelling.*



## ? Who are they...

- HVTs are English and Hindi speaking families (4 in 5) who are frequent international travellers.
- They are most likely to travel as a family unit or with their partners.
- They tend to come from the biggest cities, Mumbai and Delhi.
- When travelling to Australia in the past, they stayed on average around 2 weeks.
- They are willing to invest on holidays, favouring luxury accommodation and spending an average of \$10k per person per trip. Annually \$1.5 bn is spent by Indian HVTs on trips to AUS.

### Implications for the Tasmanian Tourism industry

- Highlight family-friendly accommodation and activities to resonate with this market.
- High-end experiences, luxury accommodation and fine dining are all opportunities to pursue with Indian HVT.
- We need to ensure Tasmania features in a tight fortnight itinerary around AU, emphasising the unique and extraordinary experiences our state offers will be key to meeting these travellers needs.





# What they value in travel



## Family Connection

Travelling is the opportunity to connect more with their friends and family. Time spent together and enjoying each other's company, engaging in activities and taking joy from the connection of shared moments. Group travel and group activities are high on their list of considerations as this is a way for all to enjoy their time together.



## Changing their perspective

Travel educates, broadens the mind and immerses them in new ideas, cultures, flavours and ways of being. HVTs see travel as a means to changing their perspective and helping them look at the world around them differently – new experiences change the way they think and feel.



## Feeling safe and secure

Safety is a key consideration when choosing places to visit. Somewhere that is welcoming, warm and inviting is far more appealing when it comes to travel. HVTs are seeking to be able to explore without fear or concern, this enables them to get the most out of their experiences.



## Experiences to remember

Creating lasting memories through experiences that are unique or once in a lifetime are important. It lets HVT's see the experience as valuable, while also leaving a lasting impression of the place they have been to. They will seek out places that offer something different to what they are used to, or unique to the location they are in.

*"We're keen to try all their local recommendations and enjoy all that is on offer. We love spending time with our friends while there, but also want to make sure we have some time to ourselves to explore as well"*

*"We love to travel and give our daughter unique experiences, and she has developed a taste for luxury! My husband has a busy job so we need to pack a lot of activities into a short amount of time when we travel."*

*"I have to be well aware of the safety as well, for my family...I believe safety is a little bit of a concern for [Tasmania], probably since it's not too crowded and a little bit out of place. So, that could be a concern".*



### Top 3 most important motivators for a holiday to Australia

1. Visiting places with immense natural beauty
2. Having a once in a lifetime experience
3. Experiencing a different way of life

### Top 3 activities of interest on holiday in Australia

1. Nature activities
2. Connecting with locals and exploring the sights
3. Food & beverage

### Top 3 Travel Values

1. Travelling more sustainably
2. Exclusive, one-of-a-kind experiences
3. Premium experiences

*"Getting vegetarian food in a foreign country is difficult. So, I've heard about these places and I'm, you know, keen to try those places out a lot."*

*"Australia is the next destination on our bucket list and we're planning a self-driving tour. I am drawn to the calm and peaceful environment and enjoying the stunning natural beauty which can be a spiritual experience"*

## What matters to them...

### Food & Drink



Indian HVTs prioritise food experiences that help them understand a culture better. Showcase unique dining experiences, luxury offerings, and be sure to highlight quality vegetarian and vegan options that will cater to the majority of the market's preferences.

### Nature



Indian HVTs value experiences that enable connection to nature and wildlife. They are keen to see local wildlife and learn about them from locals. Imagery of Tasmania's beautiful landscapes and greenery will also have high appeal.

### Luxury



Indian HVTs desire high-quality, comfortable, and luxurious experiences. They are willing to spend more on things that are important to them and their travel party – dining, accommodation, and particularly on unique experiences. Examples could include close encounters with wildlife, fruit-picking, staying in boutique hotels that cater to families, or enjoying premium dining experiences featuring local produce.

### Local connection



Indian HVTs are passionate travellers who seek cultural connections and see travel as a means to broaden their perspective on life. They value authenticity and enjoy connecting with local communities.

### Sustainability



Indian HVTs are driven by their values around sustainability and are willing to invest their time and money to support companies that try to do good, such as offsetting their impact. They seek out places that match their values and are willing to spend a little more to reduce their impact. Tasmania's focus on sustainability represents a unique proposition that can attract this group.



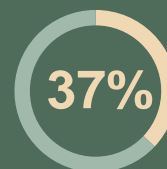
*"When I was searching for a trip to Australia, Tasmania was also shown. They showed the Franklin river where you can do adventure [experiences], like river rafting and diving. It will be a combo of luxury as well as adventure, exploring the nature, which I'm fond of. So, it will be like a three in one for me"*

*"When you go to Australia, people say, 'yeah, we've been to Sydney, we've been to the Gold Coast, we've been to Melbourne. But you know, who's talking about Tasmania? People don't"*

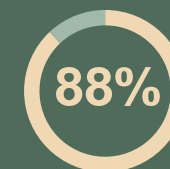
*"There's a lot of things Australia has to offer. It's possible to see one of the seven wonders of the world..."*

*"You can find beaches there [Tasmania] and adventurous stuff too. Then you can also chill with your family and experience wildlife."*

## The opportunity for Tasmania...



have travelled to Australia in the past five years.



would consider travelling here in the future.



of Indian HVTs are aware of Tasmania.



HVTs are particularly drawn to iconic landmarks or destinations anchored in unique wildlife/wilderness experiences (e.g., Kangaroo Island, Uluru, the Blue Mountains, and Cairns/Great Barrier Reef).

### Where to focus to highlight Tasmania as a destination worthy of visiting within Australia:

Elevate Tasmania's unique offerings to mainland Australia

- Communicate distinctive experiences, specialised activities, and endemic wildlife to help shape perceptions of a new and interesting place to explore.
- For Indian travellers in particular, the natural environment and cooler climate can be a huge drawcard.
- Lean into our sustainable travel proposition.

Emphasize accessibility and itinerary flexibility

- Note direct flights to Hobart from major Australian cities - effortless addition to the existing plans, removing travel as a barrier to visiting.
- Provide detailed itineraries to ensure they have an awareness of where they are and how to move between locations simply.