

# Visitor Economy Profile 2023-24: Japan

Japan is Australia’s seventh largest inbound market, not yet having reached pre-pandemic levels in FY2023-24. Total spend from Japanese visitors was $1.3 billion for FY2023–24.

## Visitor numbers

* Total visitors: 360,100
* Change vs last year: +108%
* Change vs pre–pandemic: -26%
* Rank: 7th

## Visitor group type

* Solo traveller: 52% (Total INT: 57%)
* Adult couple: 13% (Total INT: 20%)
* Family: 15% (Total INT: 12%)
* Other: 20% (Total INT: 11%)

\*Total INT = The average for total international visitors to Australia

## Visitor spend

* Average visitor spend: $4,100
* Total spend in Australia: $1.3 billion
* Change in total spend vs last year: +80%
* Change in total spend vs pre–pandemic: +9%

Japanese visitors are forecasted to return to pre-pandemic levels in 2026. 3 in 4 Japanese visitors come to Australia for a holiday or visiting friends and relatives (VFR).

## Forecast visitor growth

**Table 1: Forecast visitors to Australia, from 2015 to 2029**

| **Year** | **Japanese visitors to Australia** |
| --- | --- |
| 2015 | 342,000 |
| 2016 | 418,000 |
| 2017 | 435,000 |
| 2018 | 469,000 |
| 2019 | 499,000 |
| 2020 | 92,000 |
| 2021 | 2,000 |
| 2022 | 79,000 |
| 2023 | 298,000 |
| 2024 | 404,000 |
| 2025 | 480,000 |
| 2026 | 533,000 |
| 2027 | 569,000 |
| 2028 | 596,000 |
| 2029 | 616,000 |

## Main reason for visitation

**Table 2: Main reason for visitation**

| **Reason** | **Number of visitors from Japan** | **Percentage of visitors from Japan** | **Total INT percentage of visitors\*** |
| --- | --- | --- | --- |
| Holiday | 228,986 | 64% | 43% |
| Visiting Friends or Relatives (VFR) | 47,937 | 13% | 34% |
| Business | 32,312 | 9% | 9% |
| Education | 32,442 | 9% | 6% |
| Employment | 4,379 | 1% | 4% |
| Other | 14,063 | 4% | 4% |

## Where visitors stay

**Table 3: Where visitors stay**

| **Location** | **Percentage of visitors from Japan** | **Total INT percentage of visitors\*** |
| --- | --- | --- |
| Capital cities & Gold Coast | 77% | 93% |
| Rest of Australia | 37% | 29% |
| New South Wales | 43% | 50% |
| Victoria | 21% | 34% |
| Queensland | 48% | 29% |
| South Australia | 2% | 6% |
| Western Australia | 8% | 11% |
| Tasmania | 2% | 3% |
| Northern Territory | 4% | 3% |
| ACT | 2% | 2% |

Japanese visitors spend less nights in Australia compared to the average international visitors. Key demand-driving experiences include social and outdoors activities, local attractions, and markets.

## Nights stayed

**Table 4: Nights stayed**

| **Nights** | **Number of visitors from Japan** | **Percentage of visitors from Japan** | **Total INT percentage of visitors\*** |
| --- | --- | --- | --- |
| 1–7 nights | 200,628 | 61% | 34% |
| 8–14 nights | 46,810 | 14% | 23% |
| 15–30 nights | 20,367 | 6% | 17% |
| 31 or more nights | 58,444 | 18% | 25% |

## Visitor experience rating and trip type

* Positive trip sentiment (7+ out of 10): 95% (Total INT: 96%)
* First trip to Australia: 55% (Total INT: 36%)
* Return trip to Australia: 45% (Total INT: 64%)

## What visitors do

**Table 5: What visitors do**

| **Activity** | **Percentage of visitors from Japan** | **Total INT percentage of visitors\*** |
| --- | --- | --- |
| Eat out / dine at a restaurant and/or cafe | 94% | 89% |
| Go shopping for pleasure | 86% | 79% |
| Sightseeing/looking around | 84% | 75% |
| Go to the beach | 69% | 64% |
| Go to markets | 60% | 50% |
| Visit national parks / state parks | 52% | 48% |
| Visit wildlife parks / zoos / aquariums | 47% | 34% |
| Visit botanical or other public gardens | 33% | 45% |
| Visit museums or art galleries | 32% | 36% |
| Visit history / heritage buildings, sites or monuments | 29% | 27% |

Aviation capacity for Japan remains below pre-pandemic levels. Over 700,000 Australians visited Japan in FY2023–24.

## Aviation capacity

**Table 6: Aviation capacity**

| **Year** | **Passenger Load Factor** | **Seats Available** |
| --- | --- | --- |
| 2015–16 | 81% |  733,798  |
| 2016–17 | 82% |  803,454  |
| 2017–18 | 83% |  879,177  |
| 2018–19 | 85% |  885,907  |
| 2019–20 | 80% |  747,770  |
| 2020–21 | 12% |  77,319  |
| 2021–22 | 31% |  102,365  |
| 2022–23 | 75% |  529,296  |
| 2023–24 | 79% |  1,071,869 |

## Australians visitors to Japan

* Australians visitors to market: 702,700
* Japanese residents coming into Australia: 360,100
* NET visitor balance: -342,600

## Data sources

* Tourism Research Australia, International Visitor Survey (IVS)
* Australian Bureau of Statistics, Overseas Arrivals and Departures
* Tourism Research Australia, forecasts (arrivals to Australia forecasts)
* Bureau of Infrastructure and Transport Research Economics, Aviation Statistics

Data may not sum to 100% for all measures due to rounding and visitors can visit more than one location and/or experienced more than one activity. Updated November 2024.

Prepared by Tourism Research Australia, Australian Trade and Investment Commission (Austrade).

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