

## 2025 (January-December) Travel Trend Outlook

JTB has compiled a report on the 2025 travel trend outlook. The survey provides estimates on overnight or longer trips of Japanese residents traveling in Japan (including business trips and visits to hometowns) and of international visitors traveling to Japan. The estimates are made based on data such as economic indicators, consumer behavior surveys, transport/tourism related data, and surveys conducted by the JTB Group. The survey has been conducted continuously since 1981.

The estimated size of the travel market in 2025 is as follows.

- **The number of Japanese travelers for the year 2025 is estimated at 319.1 million (102.9% of 2024).**
- **The number of domestic travelers in 2025 is projected at 305 million (102.7% of 2024). The average spending is estimated at ¥47,800 (101.1% of 2024). Total domestic travel spending is forecast at ¥14,590 billion (103.8% of 2024).**
- **The number of outbound travelers in 2025 is estimated at 14.1 million (108.5% of 2024). The average spending is projected at ¥334,100 (106.2% of 2024). Total outbound travel spending is estimated at ¥4,710 billion (115.2% of 2024).**
- **The estimated number of inbound travelers to Japan in 2025 is 40.2 million (108.9% of 2024).**

### [Domestic travel trend of Japanese residents]

- The environment around employment and wages is expected to remain positive and gradual improvement is forecast for living conditions as well. These positive factors are expected to boost the travel appetite.
- Since prices are expected to continue rising, average spending is projected to continue increasing due to high prices.

### [Outbound travel trend of Japanese residents]

- In recent years, due to the acceleration in the yen's depreciation, a trend of holding off on outbound travel is apparent, but the calming of currency exchange rate fluctuations is expected to lead to an increase in outbound travel by Japanese residents provided there are no sudden changes in the situation.
- In addition to nearby destinations such as East Asia, the number of travelers to Oceania and other medium- and long-distance destinations is also expected to rise. The highest average spending since 2000 is projected.

### [Inbound travelers to Japan]

- The number of inbound visitors to Japan in 2025 is forecast to exceed the record-high number of inbound visitors in 2024.
- However, the sharp demand in recovery following the COVID-19 pandemic is expected to settle down, and consequently, a more gradual growth rate compared to the previous year is projected.

(Figure 1) 2025 Annual Travel Trend Estimates

	2025 forecast			2024 forecast			2019 result estimate
	Forecast	Vs. 2024	Vs. 2019	Forecast	Vs. 2023	Vs. 2019	Definitive
Total number of travelers (cumulative)	319.10 million	102.9%	102.1%	310.00 million	104.3%	99.4%	311.78 million
Domestic travel	305.0 million	102.7%	104.7%	297.00 million	103.2%	101.8%	291.70 million
Outbound travel	14.10 million	108.5%	70.3%	13.00 million	135.1%	64.8%	20.08 million
Average spending per capita							
Domestic travel	¥47,800	101.1%	125.5%	¥47,300	106.6%	124.1%	¥38,100
Outbound travel	¥334,100	106.2%	140.9%	¥314,500	105.8%	132.6%	¥237,200
Total travel spending	¥19,300.0 billion	106.4%	121.5%	¥18,140.0 billion	116.1%	114.2%	¥15,890.0 billion
Domestic travel	¥14,590.0 billion	103.8%	131.2%	¥14,050.0 billion	110.0%	126.4%	¥11,120.0 billion
Outbound travel	¥4,710.0 billion	115.2%	98.7%	¥4,090.0 billion	143.0%	85.7%	¥4,770.0 billion
Average number of trips	2.58 trips	0.08 trips	0.07 trips	2.50 trips	0.12 trips	-0.01 trips	2.51 trips
Number of inbound travelers	40.20 million	108.9%	126.1%	36.90 million	147.2%	115.7%	31.88 million

\*Domestic travel spending means total expenditures incurred after leaving home and until returning home. It includes spending at travel destinations such as shopping and meals and does not include spending before and after a trip (e.g., the cost of purchasing clothing or other travel goods).

\*Outbound travel spending includes travel expenditures (including fuel surcharges) and spending at travel destinations such as shopping and meals. It does not include spending before and after a trip (e.g., the cost of purchasing clothing or other travel goods).

\*The numbers of domestic travelers and outbound travelers both include those on business trips and those visiting their hometown.

\*For inbound trips, only the number of inbound tourists is estimated. Travel spending is not calculated.

\*Figures at or below the second decimal point are rounded off for comparisons with previous years and with 2019.

\*Because the survey results are rounded off, there could be discrepancies in the sub-totals or differences with previous years' figures.

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