

## **E-Learning Market in Japan: Key Research Findings 2014**

### **◆ Research Outline**

**Yano Research Institute has conducted a study on domestic e-learning market with the following conditions:**

1. Research period: January to March 2014
2. Research target: E-learning system developers and distributors, service & contents developers and providers, companies managing and providing business training and seminars using e-learning (operators of private preparatory schools, language schools and business trainers), learning software developers and distributors
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/FAX/e-mails, and literature research

#### **What is the e-learning market?**

The e-learning market in this research indicates a form of education services provided through internet and intranet networks. The learning methods using gaming devices and software for PC are not included. The e-learning contents include extensive ranges from business, academic subjects, languages, IT technologies, qualification acquisition, to various cultural and general knowledge.

### **◆ Key Findings**

#### **■ Domestic E-learning Market in FY2013 Projected to Attain 94.7 Billion Yen, 111.7% on Y-o-Y Basis**

The prospect size of the domestic e-learning market in FY2013 is 94.7 billion yen, 111.7% of that in the previous fiscal year. In addition to steady growth in the market for B-to-B (or for enterprises,) the flourishing market for B-to-C (or for individual users) is likely to boost the market. Due to further expansion expected for B-to-C market, the entire market in FY2014 is estimated to achieve 150.9 billion yen, striking 159.3% of the size in the previous fiscal year.

#### **■ Steadiness of E-learning Market for B-to-B Stays, B-to-C Driven by Tablet-Used Learning Services**

The atmosphere of economic recovery has encouraged large enterprise users to restart their investment to e-learning, which is likely to support the steadiness of the market for B-to-B to attain 56.8 billion yen, 101.8% of the size in the previous fiscal year. On the other hand, the market for B-to-C is anticipated for further expansion, achieving 37.9 billion yen, 130.7% of the size in the previous fiscal year, boosted by some of the large educational bodies, including corresponding courses or private tutoring schools, providing special courses using specific tablets.

◆ **Report format:**

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Language: Japanese

Format: 550 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

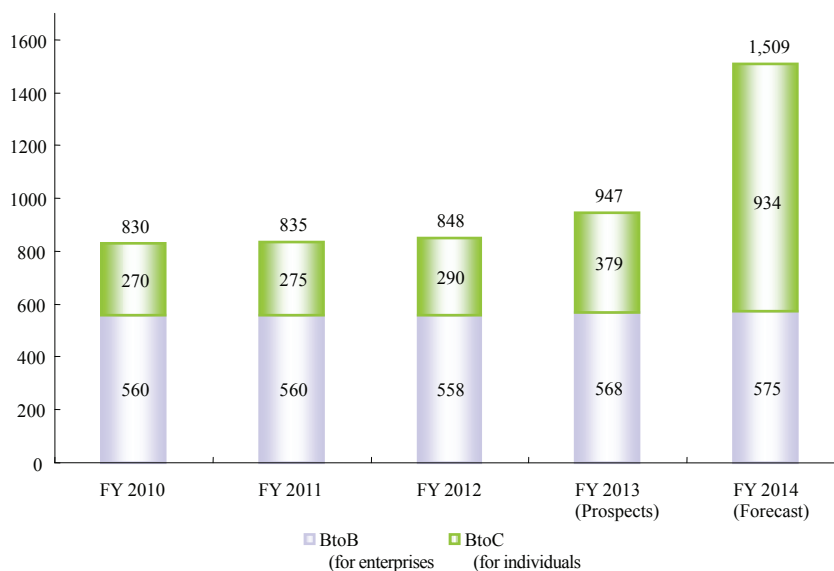
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■ **Figure 1: Transition of Size of E-Learning Market**



Notes:

- Figures are based on the sales from service providers.
- The figures of B to C have been reviewed retroactively.