

## **Market of After-School Care Programs in Japan: Key Research Findings 2015**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the market of after-school care programs with the following conditions:**

1. Research period: April to June, 2015
2. Research target: Companies and institutions in the business of after-school care programs
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/FAX/mail-in questionnaire, and literature research

#### **<What is the Market of After-School Care Programs?>**

The market of after-school care programs in this research indicate the nursery services for children after schools operated by private organizations. This research targets those nursery services operated by private businesses regardless of whether the nursery may be owned by public or private sector. Therefore, the research target includes those services privately-owned and operated and also, such a service as “After School Children’s Club” owned by a public sector that asked a private sector to run it.

### ◆ **Key Findings**

#### ■ **Market of After-School Care Programs in FY2014 Expanded by 6.3% on Y-o-Y Basis to Attain 286.2 Billion Yen**

Size of the after-school care programs market has grown by 6.3% from the previous fiscal year to achieve 286.2 billion yen in FY2014, based on the sales of the businesses. Especially conspicuous of the market is increasing number of public or ward-owned nurseries both of which operated by the private sectors. Increase of such nurseries is expected to accelerate solving the issue of children on the waiting list of entering nurseries.

#### ■ **Launch of New Support Plan for Children and Raising Children, With Improved Quality and Quantity in Assistance**

The government expressed its intention to increase the capacity of after-school care programs to another 300 thousand children within five years from 2015. In the New Plan for Supporting Children and Raising Children that have started in April 2015, the government plans to enhance after-school care services both in terms of quality and quantity.

#### ■ **Increasing Number of After-School Care Programs Owned/Operated by Private Sector Successfully Respond to Diverse User Needs**

The privately owned/operated after-school service providers have come to add values in their services, meaning that they do not just look after the children, but also offer additional services such as to help children study or do some homework, responding to diverse user needs. In recent years, there are moves among those private businesses that have value-added services: Some are vigorous in operating nurseries, and some provide their knowledge as an OEM to the existing after-school care service providers to improve the services. There are cases where the service

resources are used mutually among some private companies aiming to synergize the service effects.

◆ **Report format:**

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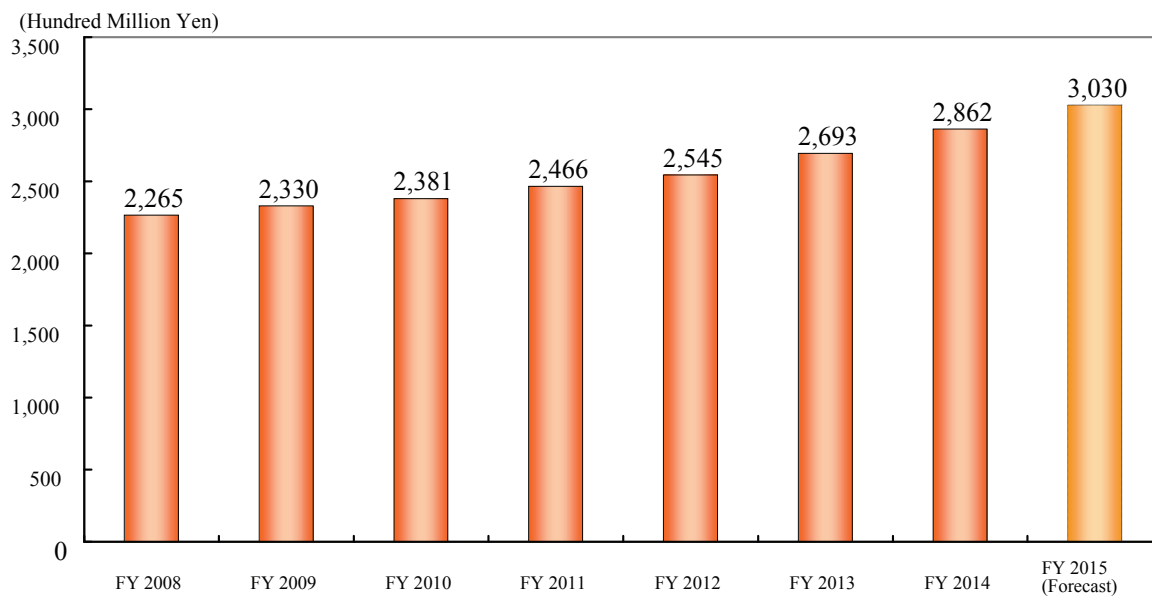
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■ **Figure 1: Transition of Market Size of After-School Care Programs**



Notes:

1. The figure is based on business turnover.
2. The market of after-school care programs in this research indicate nursery care services to take care of children after schools operated by private organizations. Only those programs operated by private sector are included in this research, and not those by public institutions or local governments.