

e-Learning Market in Japan: Key Research Findings 2016

◆ Research Outline

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

1. Research period: January to March, 2016
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 expert researchers, surveys via telephone and email, 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 other networks. The learning methods using gaming devices and software for PCs are not included. The e-learning contents include extensive ranges from business, academic subjects, languages, IT technologies, qualification acquisition, to various cultural and general knowledges.

◆ Key Findings

■ **Domestic e-Learning Market Projected to Scale Down to 159.650 Billion Yen in FY2015, 95.9% of Size of Previous Year; Expected to Recover and Expand in FY2016**

The domestic e-learning market in FY2015 is projected to decrease to 159.650 billion yen, 95.9% of the size of the preceding fiscal year. In spite of a slight growth of the B-to-B market for corporate bodies, it was not enough to cover the loss of the B-to-C market for individuals, which brought down the entire market. However, expansion is expected for the domestic e-learning market in FY2016, due to likeliness of steadiness of B-to-B market to continue, and of more sufficient services in the leading corresponding education to drive the market growth.

■ **E-learning Market for B-to-B Showing Stable Growth, While for B-to-C Turning to a Decline After Continuous Expansion in Past Years**

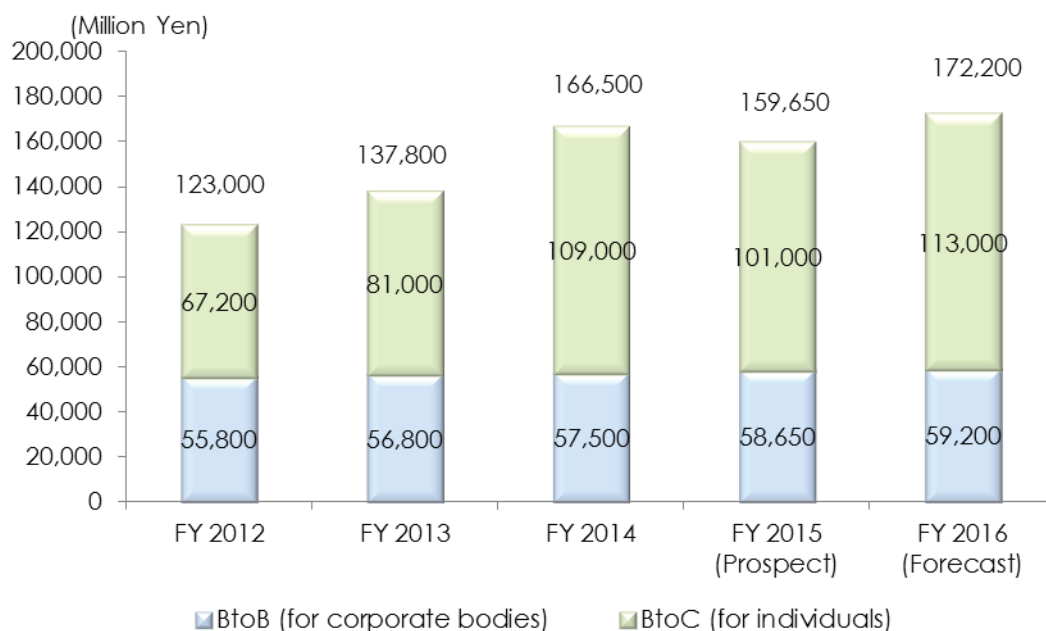
The e-learning market for B-to-B in FY2015 is likely to attain 58.650 billion yen, 102.0% of the size of the preceding fiscal year, because improved convenience of e-learning services has invited increasing number of user companies to use the services. On the other hand, however, the e-learning market for B-to-C in FY 2015 is predicted to decline to 101.00 billion yen, 92.7% of the size of the previous fiscal year, influenced by some services began being limited by leading corresponding education providers, obscuring growth shown for some services.

◆ **Report format:**

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■ **Figure 1: Transition and Forecast of e-Learning Market Size**



Survey by Yano Research Institute

Notes:

1. The market sizes are based on the sales of businesses.