

## **Language Business Market in Japan: Key Research Findings 2017**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the language business market with the following conditions:**

1. Research period: April to June, 2017
2. Research target: Foreign language schools, publishers, manufacturers of electronic dictionaries, software makers, e-learning businesses, correspondence education service providers, makers of language study materials, and such service providers as overseas-education arrangement, and interpretation/translation.
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/FAX, and literature research

#### **<What is the Language Business Market?>**

The language business market in this research indicates the following 14 categories of foreign language class markets: 1) Foreign language classes for adults, 2) Foreign language classes for children/infants, 3) Pre-schools, 4) Deployment of teachers to kindergarten/day-care centers for children, 5) Textbooks, 6) Self-learning language hardware/software, 7) Electronic dictionaries, 8) Textbooks of English conversation classes for children/infants, 9) Correspondence education, 10) E-learning, 11) Software, 12) Language exams, 13) Overseas-education arrangement, 14) Interpretation/translation business. Note that markets of 12) language exams, 13) overseas-education arrangement, and 14) interpretation/translation business are defined here in the category of "Peripheral Business."

### ◆ **Key Findings**

#### ■ **Language Business Market (Major 14 Categories) in FY2016 Achieved 849.8 Billion Yen, 102.7% on Y-o-Y Basis**

Size of the language business market (total of 14 categories) in FY2016 rose to 849.8 billion yen, 102.7% of that of the preceding fiscal year, based on the sales of the businesses. In addition to continuous steadfast sales from the previous fiscal year regarding the services for children (i.e., Foreign language classes for children/infants, Preschools, Deployment of teachers to kindergarten/day-care centers for children, and Textbooks of English conversation classes for children/infants), the e-learning market have been prosperous, attaining double digit growth. The translation/interpretation business market, defined here as "Peripheral Business" in the entire language business market, has also continued being stable.

■ **Language Business Market (Major 14 Categories) in FY2017 Projected to Achieve 868.2 Billion Yen, 102.2% on Y-o-Y Basis**

The entire language business market (total of 14 categories) for FY2017 is projected to achieve 868.2 billion yen, 102.2% of the size of the preceding fiscal year. Because of English becoming the required subject at elementary schools together with the reforms at university admission system, increasing number of children is likely to learn English, so that the services for children including foreign language classes for children/infants, pre-schools, deployment of teachers to kindergarten/day-care centers for children, and textbooks of English conversation classes for children/infants can expect favorable sales. This is likely to lead the entire language business market to remain robust.

◆ **Report Format:**

Published report: "Language Business Market 2017"

Issued in: June 30, 2017

Language: Japanese

Format: 538 pages in A4 format

Price: 120,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ Table 1: Transition of Size of Language Business Market by Category

(Hundred Million Yen)

| Market Category  | Market Definition  | FY2015 | FY2016 | FY2017 (Forecast) |
|--|--|--------|--------|-------------------|
| <b>■ Language Schools</b>  |  |        |        |                   |
| Entire Foreign Language Class Market   | Public or private organizations that provide classes, schools and courses aiming for students to acquire foreign language abilities  | 3,440  | 3,490  | 3,535             |
| ①Language Class Market for Adults  | Foreign language classes for highschool students or older. Fees for the textbooks used in the classes are included in the market   | 2,090  | 2,100  | 2,110             |
| ┌ Business Needs Market  | Market that targets users of language classes for business   | 1,280  | 1,285  | 1,290             |
| └ Market for Hobbies   | Market that targets users of language classes for non-business objectives  | 810    | 815    | 820               |
| ┌ One-to-One Based Lessons Market  | Foreign Language classes with a teacher teaching a single student (one-to-one base)  | 360    | 365    | 370               |
| └ Group Lesson Market  | Foreign Language classes with multiple students against one teacher  | 1,730  | 1,735  | 1,740             |
| ②Market of Foreign Language Classes for children and infants   | Foreign language classes for children from 0 year old to junior high school students, excluding preschools. Text books used in the class are included in the market                    | 1,010  | 1,030  | 1,050             |
| ③Preschool Market  | Kindergarten, nursery schools that educate, and take care of children only in English. Children are targeted from age 0 to those in kindergartens                                      | 340    | 360    | 375               |
| ④Deployment of Teachers in Kindergarten/Nursery Schools  | Extracurricular programs of foreign language classes for kindergarten and nursery schools  | 35     | 36     | 37                |
| <b>■ Learning Materials</b>  |  |        |        |                   |
| ⑤Books and Textbooks Market  | Language books, reference books, dictionaries, textbooks certified as the standards of Ministry of Education, Culture, Sports, Science and Technology, including those used at schools | 386    | 383    | 381               |
| ⑥Self-learning language hardware/software  | Textbooks packaged with self-learning language hardware/software, excluding those not sold in package  | 201    | 198    | 195               |
| ⑦Electronic Dictionaries Market  | Market of only electronic dictionary devices, excluding application software embedded within PCs or mobile-phones  | 532    | 513    | 513               |
| ⑧English Conversation Textbooks for Children/Infants   | English textbooks for children of age 0 to kindergarten students, excluding textbooks for English conversation classes   | 290    | 307    | 320               |
| ⑨Correspondence Education Market   | Language classes and courses in which assignments are corrected through correspondence. This market exclude those that do not correct assignments                                      | 220    | 200    | 195               |
| ┌ Correspondence for business people   | Correspondence education for business people   | 90     | 85     | 80                |
| └ Correspondence for students before working   | Correspondence education for students and for preparation of university entrance test  | 130    | 115    | 115               |
| ⑩e-learning Market   | Language classes using e-learning via PCs and mobile phones  | 80     | 90     | 100               |
| ⑪Software Market   | Market of software for PCs and gaming devices, aiming for learning languages   | 27     | 25     | 26                |
| ┌ Software for gaming devices  | Market of software for gaming devices, aiming for learning languages   | 11     | 10     | 9                 |
| └ Software for PCs   | Market of software for PCs, aiming for learning languages  | 16     | 15     | 17                |
| <b>■ Peripheral Business</b>   |  |        |        |                   |
| ⑫Language Exams Market   | Market for qualifying exams of foreign languages   | 240    | 241    | 250               |
| ⑬Overseas Education Arrangement Market   | Overseas education business/agents   | 210    | 220    | 230               |
| ⑭Translation/Interpretation Business Market  | Business of translation and interpretation   | 2,611  | 2,795  | 2,900             |
| Language Business Market Without Peripheral Business (i.e.⑫Language Exams Market, ⑬Overseas Education Arrangement Market, and ⑭Translation/Interpretation Business Market) |  | 5,211  | 5,242  | 5,302             |
| Total Language Business Market (Total of 14 Categories)  |  | 8,272  | 8,498  | 8,682             |

Research by Yano Research Institute

Notes:

1. The market size is based on the sales of the businesses.