

Language Business Market in Japan: Key Research Findings 2011

◆ **Research Outline**

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

1. Research target: Foreign language schools, publishers of language education materials, manufacturers of electronic dictionaries, suppliers of hardware and software for language learning, language service providers: those companies and organizations in e-learning business/ correspondence education, those selling language study materials, those organizing/operating qualification exams, those arranging overseas education, those in interpreting and translating business, and etc.
2. Research period: April to June, 2011
3. Research methodologies: Face-to-face interviews mixed with telephone/email surveys

<What is language business market?>

Language business market in this research corresponds to such markets as overall foreign language classes, deployment of teachers to kindergarten/day-care centers for children, textbooks, self-learning language hardware/software, electronic dictionaries, textbooks of English conversation classes for children, correspondence education, e-learning, software, language exams, overseas-education arrangement, interpretation/translation business, foreign language education other than English (correspondence and school attending.) Note that markets of language exams, overseas-education arrangement, and interpretation/translation business are positioned here as “peripheral businesses.”

Note also that market of learning materials for English conversation classes for children has been downwardly-revised from 94.7 billion to 92.7 billion yen in FY 2009. Therefore, the size of the market in the past has partly retroactively revised.

◆ **Key Findings**

- **With estimated figures at 749.4 billion yen, up 1.6% year-on-year, markets for language and its peripheral business have shifted to expansion**

Language business market, together with its peripherals (i.e. markets of language exams, overseas-education arrangement, and interpretation/translation business) in FY2010 are estimated as 749.4 billion yen, increasing 1.6 % year-on-year, showing the steady growth due to the hopeful signs of recovery in economy since the fall of 2010. The market growth is also caused by the boosting demands among blue-chip and large-scale companies for their globalization measures such as making English as companies’ official language. Incidentally, language business market without peripheral business is estimated at 499.9 billion yen, down 0.1% from the previous year.

■ **The market continues to grow in spite of aftermath of the Great East Japan Earth Quake**

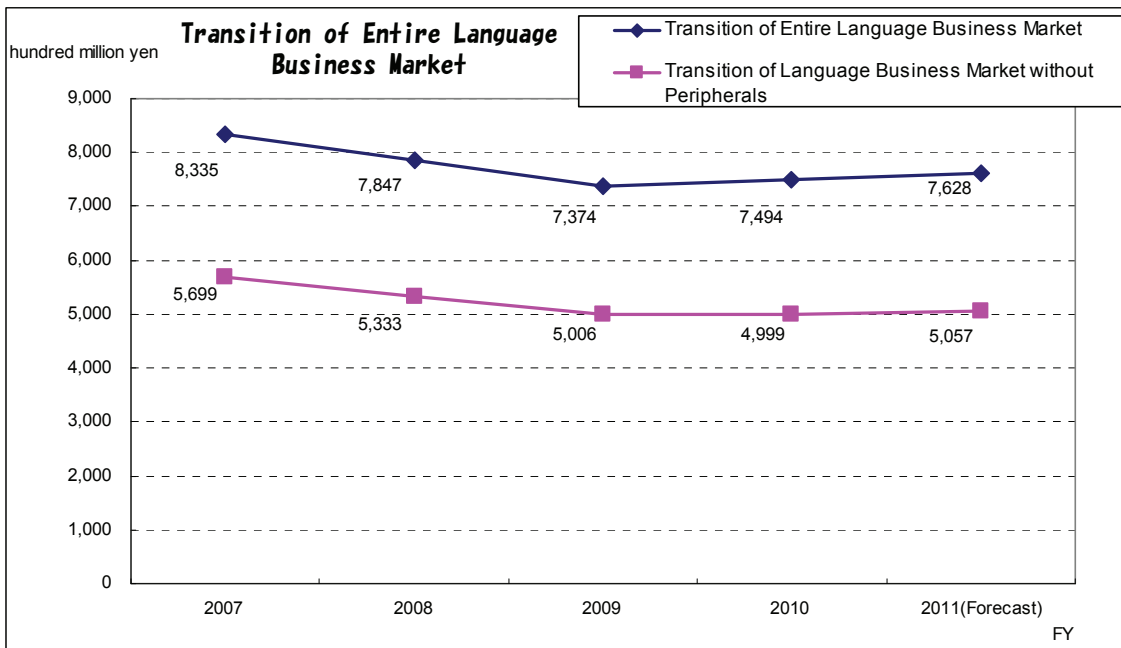
From the full year point of view, plus factors, one of which is demand boosting in mastering foreign languages among businesses, have prevailed some adverse effects, like business-opportunity losses and some physical losses from the great earthquake that hit in March 2011. Moreover, the following new curriculum guidelines in foreign language education, to name a few, are adding further impetus to the market: Mandatory English class in primary schools; revision of English classes to increase time and vocabulary in junior high from 2012; and establishment of English-only spoken class in high schools.

The size of language business market including its peripheral business in 2012 is expected to grow at 762.8 billion yen, up 1.8% from the previous year, and the market without the peripheral business is estimated at 505.7 billion, up 1.2% compared to the previous year.

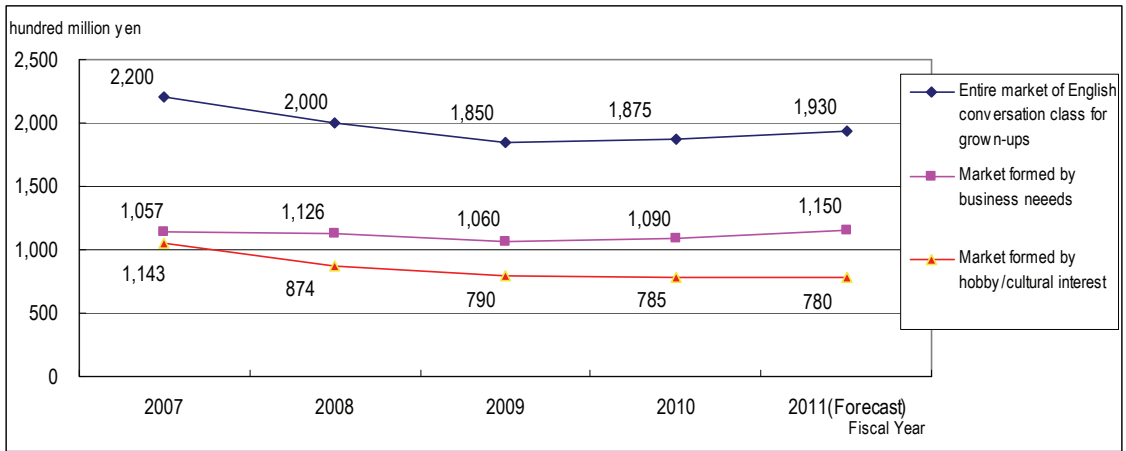
◆ **Report format:**

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Contacts: Public Relations
Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)
 Phone: +81-3-5371-6912 E-mail: press@yano.co.jp



[Transition of market size by needs]



[Transition of market size by form of class]

