

Language Business Market in Japan: Key Research Findings 2013

◆ **Research Outline**

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

1. Research period: April to June, 2013
2. Research target: Foreign language schools, publishers of language education materials, manufacturers of electronic dictionaries, suppliers of hardware and software for language learning, 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.
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/FAX, and literature research

<What is language business market?>

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 language exams, overseas-education arrangement, and interpretation/translation business are defined here as language “peripheral business.”

◆ **Key Findings**

■ **Size of Language Business Market in FY2012 Rose to 789.2 Billion Yen, 102.7% of Previous Year, Driven by Growing Demand to Learn Foreign Language**

Language business market (total of 14 categories) increased its size to 789.2 billion yen in F2012, 102.7% of the size in the previous fiscal year, because of growing needs to learn English and other foreign languages in order to comply with increasing opportunities to speak in foreign languages or to conform to company policies in some of large companies regulating English as official corporate language, as more companies starting operations overseas. The needs for foreign language classes and e-learning are especially vibrant from both individual people and corporations.

■ **Estimated Size of Language Business Market in FY2013 Achieves 104.3% of Previous Year at 823.0 Billion Yen, Boosted by Expanded Demands in Business and Education**

Language business market (total of 14 categories) expects growth for FY2013 with its size estimated to attain 823.0 billion yen, 104.3% of the size in the previous fiscal year. It is because of growing needs of efficient people with global senses who are able to use foreign languages to play important roles in overseas business.

In addition to enforcement of revised curriculums from primary schools to high schools during the period from FY2011 through FY2013, there are rising tendency to place importance on English and other foreign languages in education in order to foster human resources who are able to work in global work place. The parents, too, are becoming interested in early education, especially English, which in turn, driving English education market for children and infants to be steady.

◆ **Report format:**

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■ Transition of Size of Language Business Market by Category

Market Category	Market Definition	FY2011	FY2012	FY2013 (Forecast)
■Language School				
Entire Market of Foreign Language Classes	Public or private organizations that provide classes, schools and courses aiming for students to acquire foreign language abilities.	3,146	3,244	3,372
①Language Classes for Adults	Foreign language classes for highschool students or older. Textbooks use in that class are included in the market.	1,951	2,036	2,138
{ Market for Business	Market that targets users of language classes for business.	1,138	1,196	1,258
{ Market for Hobbies	Market that targets users of language classes for non-business objectives	813	840	880
{ One-to-One Lessons Market	Foreign Language classes with a single student against one teacher (one-to-one base)	310	320	330
{ Group Lesson Market	Foreign Language classes with multiple students against one teacher	1,641	1,716	1,808
②Foreign Language Classes for children and infants	Foreign language classes for children from 0 year old to junior high school students. Text books used in the class are included in the market.	920	929	942
③Preschool Market	Kindergarten, nursery schools that educate, and take care of children only in English	275	279	292
④Deployment of Teachers in Kindergarten	Extracurricular programs of foreign language classes for kindergarten and nursery schools	27	29	31
■Learning Materials				
⑤Books and Textbooks Market	Books, reference books, dictionaries, textbooks certified as the standards of Ministry of Education, Culture, Sports, Science and Technology	409	387	405
⑥Self-learning language hardware/software,	Textbooks packaged with self-learning language hardware/software	263	265	266
⑦Electronic Dictionaries Market	Market of only electronic dictionaries. No application software embedded within PCs or mobile-phones included.	679	621	590
⑧English Conversation Textbooks for Children	English textbooks for children of age 0 to kindergarten students. No textbooks for English conversation classes included.	212	245	270
⑨Correspondence Education Market	Language classes and courses in which assignments are corrected through correspondence. This market exclude those that do not correct assignments.	273	277	270
{ Correspondence for business people	Correspondence education for business people.	103	105	107
{ Correspondence for students	Correspondence education for students and for preparation of university entrance test.	170	172	163
⑩E-learning Market	Language classes using e-learning via PCs and mobile phones	46	55	65
⑪Software Market	Software for PCs and gaming devices aiming for Learning languages.	52	50	48
{ Software for gaming devices	Software for gaming devices aiming for learning languages	24	18	14
{ Software for PCs	Software for PCs aiming for learning languages	28	32	34
■Peripheral Business				
⑫Language Exams Market	Market for qualifying exams of foreign languages	198	200	210
⑬Overseas Education Arrangement Market	Overseas education business/agents	144	165	190
⑭Translation/Interpretation Business Market	Business of translation and interpretation	2,237	2,354	2,513
Language Business Market (without peripheral business)		5,107	5,173	5,317
Total Language Business (total of 14 categories)		7,686	7,892	8,230