

e-Learning Market in Japan: Key Research Findings 2015

◆ 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, 2015
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 intranet networks. The learning methods using gaming devices and software for PC are not included. The e-learning contents include extensive ranges from business, academic subjects, languages, IT technologies, qualification acquisition, to various cultural and general knowledge.

◆ Key Findings

■ Domestic e-Learning Market Size for FY2014 Projected to Expand to 166.5 billion Yen, 120.8% of Size of Previous Year

Size of the domestic e-learning market in FY2014 is expected to attain 166.5 billion yen, 120.8% of the size of the preceding year. In spite of a slight growth of the B-to-B market for corporate bodies, a large expansion of the B-to-C market for individuals boosted the entire market. Although e-learning services for the B-to-C market is likely to continue increasing, the unit price per service can be reduced or can even be free of charge. Therefore, the market growth in FY2015 is expected to be moderate.

■ E-learning Market for B-to-B Showed Stable Growth and that for B-to-C Attained Remarkable Expansion

The e-learning market for B-to-B in FY2014 is likely to attain 57.5 billion yen, 101.2% of the size of the previous year, showing stable growth stemming from recovery of investments to e-learning by large companies in FY2013 and beyond. On the other hand, substantial growth is expected for the e-learning market for B-to-C in FY 2014, with the market size attaining 134.6% of the size of the preceding year to achieve 109.0 billion yen. It is because some of large education businesses including correspondence-course providers and cram schools have started introducing some learning courses that use telecommunication technologies.

◆ **Report format:**

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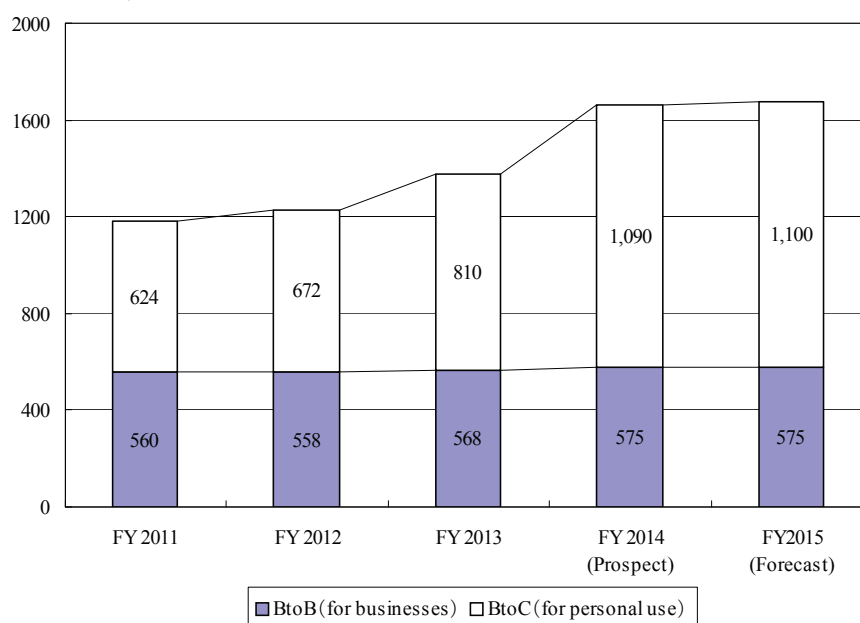
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■ **Figure 1: Transition and Forecast of e-Learning Market Size**

(Hundred Million Yen)



Notes:

1. The figures are based on the sales of businesses.
2. The figures in the market for B-to-C have retroactively been reviewed.