

Employee Training Service Market: Key Research Findings 2015

◆ Research Outline

Yano Research Institute has conducted a study on the domestic employee training service market with the following conditions:

1. Research period: From April to June, 2014
2. Research target: employee training services providers, user companies and organizations adopting employee training services
3. Research methodologies: Face-to-face interviews by the expert researchers, survey via telephone/email, and literature research

<What are Employee Training Services?>

The employee training services in this report target training and education provided by external companies as a kind of business, so that no in-house training and education to the employees are included. Note that if a training service provider is a subsidiary of a company group, those training and education services provided to its parent company or to the group it belongs are included in this report.

Contents of the employee training/educational services include business-related training programs (business-rank based, business-task training, motivation raising, and more), acquiring IT knowledge, obtaining skills, learning foreign languages, acquiring qualifications, and etc.

◆ Key Findings

■ **Employee Training Service Market in FY2014 Expanded by 1.5% on Y-o-Y Basis to Attain 486.0 Billion Yen**

The employee training service market in FY2014 based on the sales of the businesses rose by 1.5% from the previous year to reach 486.0 billion yen. Triggered by the domestic economic recovery, vigorous recruiting activities not only by large enterprises but also by middle-sized or small companies have driven the demands for training new employees in various business categories. Conspicuous was the demands for training and education relating to My Number System (Social Security and Tax Number System).

■ **Training Demands Expanding at Mid-Size and Small Companies**

Majority of the employee training service users are large businesses and organizations. However, in FY2014, the demands for the services expanded to mid- and small-size firms, expected to become new customers that may robustly support the employee training service market in the future.

■ **Increase of E-Learning Used as a Method of Employee Training**

In FY2014 there were increasing number of users and user companies of e-learning which many of the employee training service providers have used as a method of training and education. Especially prominent in such tendency was seen at the IT-related training service providers.

◆ Report format

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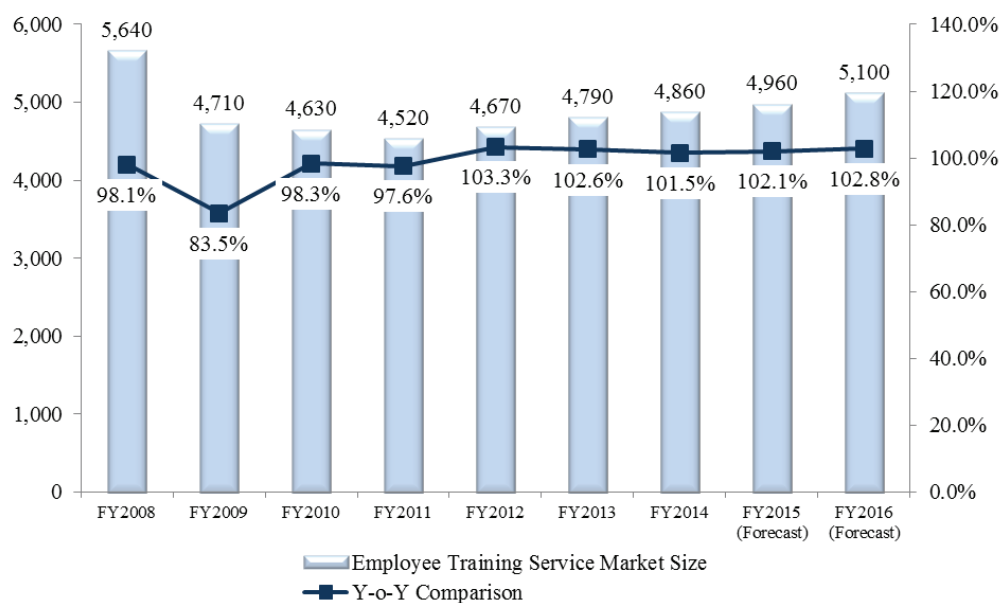
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■ **Figure 1. Transition and Forecast of Employee Training Service Market**

(Hundred Million Yen)



Estimated by Yano Research Institute

Notes:

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