

Language Business Market in Japan: Key Research Findings 2015

◆ **Research Outline**

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

1. Research period: April to July, 2014
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 and correspondence education, companies and organizations selling language study materials, organizing/operating qualification exams, arranging overseas education, and 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**

■ **Language Business Market in FY2014 Projected to Achieve 813.1 Billion Yen, 100.5% from Preceding Year**

Size of language business market (total of 14 categories) in FY2014 rose to 813.1 billion yen, 100.5% of the size in the preceding fiscal year, based on the sales of the businesses. Among the 14 categories, e-learning and English conversation textbooks for children have grown favorably to boost the entire language business market. However, the categories of software, correspondence education, and electronic dictionaries have deeply declined, which counterbalanced the entire market to stay the same level as the previous fiscal year.

■ **E-Learning Expanded Dramatically**

E-learning market size based on the sales of the businesses attained 7.5 billion yen, 115.4% of the size in the preceding fiscal year. Especially, those service providers offering English conversation services using Skype and other tools increased the sales. This stems from rising

social awareness of the services through stock listing, advertisements on TVCM, and etc.

■ **Language Business Market in FY2015 Projected to Achieve 827.1 Billion Yen, 101.7% on Y-o-Y Basis**

The entire language business market (total of 14 categories) in FY2015 is projected to achieve 827.1 billion yen, 101.7% of the size in the preceding year. The market is likely to remain stable for the time being, because of the continuous favorable sales expected by the categories of 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.

◆ **Report format:**

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■ Transition of Size of Language Business Market by Category

Hundred Million Yen

Market Category	Market Definition	FY2013	FY2014	FY2015 (Forecast)
■Language School				
Entire Foreign Language Class Market	Public or private organizations that provide classes, schools and courses aiming for students to acquire foreign language abilities	3,327	3,380	3,540
①Language Classes for Adults	Foreign language classes for high school students or older. Textbooks used in that class are included in the market size	2,077	2,080	2,090
Market for Business	The market targeting attendees of foreign language classes hoping to be able to use in business	1,237	1,260	1,280
Market for Hobbies	The market targeting attendees of language classes for non-business objectives	840	820	810
One-to-One Lessons Market	Foreign Language classes with a single student against one teacher (one-to-one base)	340	345	350
Group Lesson Market	Foreign Language classes with multiple students against one teacher	1,737	1,735	1,740
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 size	952	990	1,100
③Preschool Market	Kindergarten, nursery schools that educate, and take care of children only in English	298	310	350
④Deployment of Teachers in Kindergarten	Extracurricular programs of foreign language classes for kindergarten and nursery schools	31	34	37
■Learning Materials				
⑤Books and Textbooks Market	Books, reference books, dictionaries, textbooks certified as the standards of Ministry of Education, Culture, Sports, Science and Technology	386	387	385
⑥Self-learning language hardware/software,	Textbooks packaged with self-learning language hardware/software	210	206	202
⑦Electronic Dictionaries Market	Market of electronic dictionaries only.. No application software embedded within PCs or mobile-phones included.	600	540	463
⑧English Conversation Textbooks for Children	English textbooks for children of age 0 to kindergarten students. No textbooks for English conversation classes included.	270	290	290
⑨Correspondence Education Market	Language classes and courses in which assignments are corrected through correspondence. This market exclude those that do not correct assignments.	270	240	220
Correspondence for business people	Correspondence education for business people.	107	95	90
Correspondence for students	Correspondence education for students and for preparation of university entrance test.	163	145	130
⑩E-learning Market	Language classes using e-learning via PCs and mobile phones	65	75	80
⑪Software Market	Software for PCs and gaming devices aiming for learning languages.	48	29	27
Software for gaming devices	Software for gaming devices aiming for learning languages	14	12	11
Software for PCs	Software for PCs aiming for learning languages	34	17	16
■Peripheral Business				
⑫Language Exams Market	Market for qualifying exams of foreign languages	205	214	230
⑬Overseas Education Arrangement Market	Overseas education business/agents	190	200	220
⑭Translation/Interpretation Business Market	Business of translation and interpretation	2,487	2,536	2,577
Language Business Market (without peripheral business)		5,207	5,181	5,244
Total Language Business (total of 14 categories)		8,089	8,131	8,271

Estimated by Yano Research Institute

Notes:

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