

EAP Service Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the EAP service market with the following conditions:

1. Research period: December 2013 to March 2014
2. Research target: Leading companies providing EAP services
3. Research methodologies: Face-to-face interviews by the specialized researchers, survey via telephone/e-mail and literature research

What is EAP?

EAP (Employee Assistance Programs) is an employee-benefit program to help improve working environments and production abilities of client companies and organizations by assisting to solve employees' mental challenges (not only those within the working places but also those regarding private matters) through counseling.

The EAP service market in this research indicates the outsourcing services to make better working conditions by helping achieve the mental health of employees. These services include stress checks, counseling by industrial doctors, and other peripheral services like introducing specialized doctors (or medical institutions), reemployment support/preventive measures, education/training, and organizational analysis/researches/consulting for improvement.

◆ Key Findings

■ EAP Service Market in FY2014 Rose by 2.9% to Attain 21.4 Billion Yen

Although the EAP service market has temporarily staggered after the Lehman's Shock as user companies reviewed their expenditure, the gradual economic recovery has made the market to get on the growth track once again, which increased the adoption of EAP services at enterprises and the number of employees receiving EAP services, making the market to get on the growth track once again. On the other hand, as users of EAP service grew, the unit price of the services kept on declining. This led the EAP service market size to grow only by 2.9% to attain 21.4 billion yen, based on the sales of EAP service providers.

■ Obligatory Stress Check System Enforced in December 2015 Expected to Trigger Expanding Demands of EAP Services

The annual (or more frequently performed) stress check system targeting all the companies with more than 50 employees enforced in December 2015 as a part of the Industrial Safety and Health Law is likely to trigger more demands for EAP services. The services are considered to be fully adopted at public agencies and most of the enterprises in FY2016 and beyond, by which adoption of the system is to be accounted for in respective budgets.

■ EAP Service Market in FY2015 Projected to Rise by 4.7% to Attain 22.4 Billion Yen

The EAP service market in FY2015 is expected to be boosted by the trial adoption of the stress check at some large companies just before going mandatory, and also after the system being

obligatory especially at some companies with their settlement of accounts at December, which is projected to raise the market size by 4.7% on Y-o-Y basis to attain 22.4 billion yen (based on the sales of service providers), though the growth level may not so much as FY2016 when the stress check is scheduled to be fully enforced.

◆ **Report format:**

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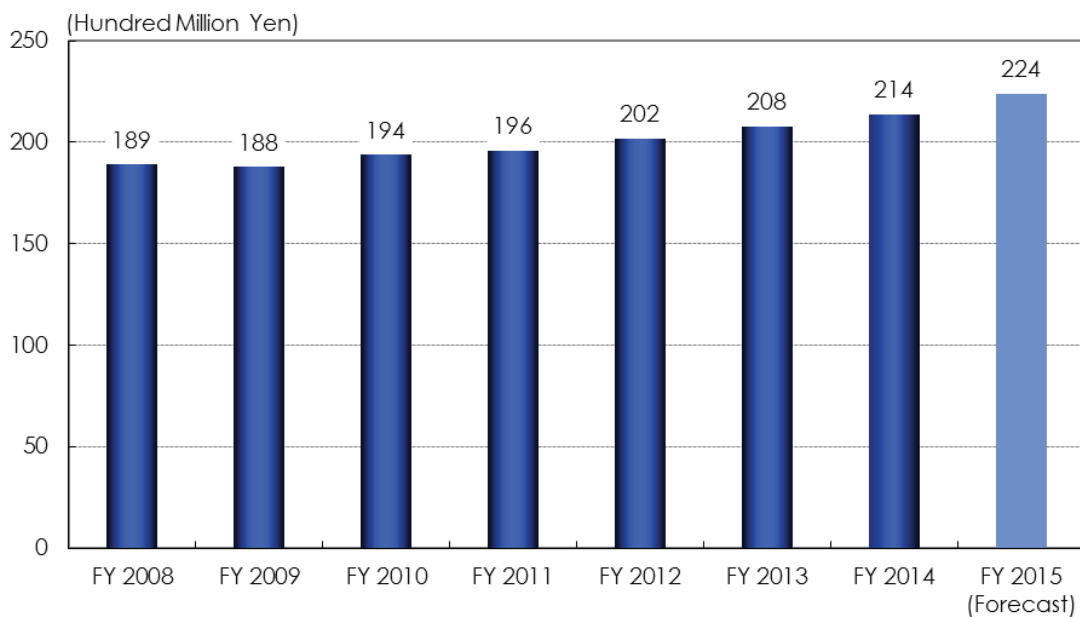
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure 1: Transition of Size of EAP Service Market**



Source: Survey by Yano Research Institute

Notes:

1. The figures are based on the sales of the service providers.
2. The EAP service market in this research indicates the outsourcing services to make better working conditions by helping achieve the mental health of employees. These services include stress checks, counseling by industrial doctors, and other peripheral services like introducing specialized doctors (or medical institutions), reemployment support/preventive measures, education/training, and organizational analysis/researches/consulting for improvement.