

## Lessons and Learning Classes Market in Japan: Key Research Findings 2016

### ◆ Research Outline

Yano Research Institute has conducted a study on the domestic lessons and learning classes market with the following conditions:

1. Research period: From April to June 2016
2. Research targets: Leading businesses of culture centers, fitness clubs, correspondence education, and other companies in lessons and learning business
3. Research methodologies: Face-to-face interviews, surveys by telephone/emails, and literature research

#### What is the Lessons and Learning Classes Market?

Lessons and learning classes in this research indicate the forums where teachers, coaches, masters, or instructors teach techniques, knowledge or culture at classrooms or at schools as a kind of “hobby” or “recreation” of their students or clients (regardless of whether the students may be adults, children, or toddlers) operated by private businesses, or at some events held at public halls and community centers, or at teachers’ houses privately, or in the correspondence education, or e-learning provided through the internet. The market size is calculated based on the tuition fees or lesson fees paid by the students and participants of such classes. Note that those classes at vocational schools for developing qualities and skills needed to acquire qualifications and to be the professionals are not included.

The targeted categories are the following nine: 1) Sports classes; 2) Japanese culture classes: flower arrangement, tea ceremony, Japanese calligraphy, “Nihon Buyo (classical Japanese dance)”, game of “go”, “Shogi (Japanese chess)”, “Tanka (Japanese poetry)”, “Haiku (Japanese poetry with only 5, 7 and 5 syllables)”, and Kimono dressing; 3) Foreign language classes: English, Chinese, Korean, French, German classes, schools and seminars (no foreign language lessons taught by individual tutors are included); 4) Art classes: picture drawing, sculpture carving, photo taking, ceramic art, handicrafts including knitting and tapestry works, flower arrangement, and gardening; 5) Dancing: ballet, social dancing, Jazz dance, and hip-hop; 6) Music and instruments Lessons; 7) Cooking classes; 8) Beauty and health: nail arts and aromatherapy, 9) PC-related Classes.

### ◆ Key Findings

#### ■ Lessons and Learning Classes Market in FY2015 Slightly Declined by 0.3% from Previous Fiscal Year to Attain 1,969.9 Billion Yen

Size of the lessons and learning classes market in FY2015 fell by 0.3% from the previous fiscal year to attain 1,969.9 billion yen based on the lesson fees. Among the nine categories the following three exceeded the size of the previous year: Sports classes showing stable growth especially in those classes for children; foreign language classes with increasing number of participants/students for business men and for children/toddlers; and cooking classes.

#### ■ Almost 20% Experienced Self-Learning by Using Free Online Video Distribution Services

The consumer survey relating to this research showed that 19.2% of the respondents have experience of self-learning by using free-of-charge online video distribution services for several

times, rather than attending the classes to learn from a teacher or instructor. Among such self-learned classes, foreign language classes dominated 57.7%, followed by fitness/sports classes which occupied 21.6%, and then came music/instruments classes which accounted for 17.3%. It means that there exist a certain number of people who consider that self-learning using online video distribution services is enough to fulfill their needs even some categories need performance or expressions using their own bodies to be coached.

◆ **Report Format:**

Published report: “Lessons and Classes Market 2016”

Issued on: June 27, 2016

Language: Japanese

Format: 425pages in A4 format

Price: 120,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

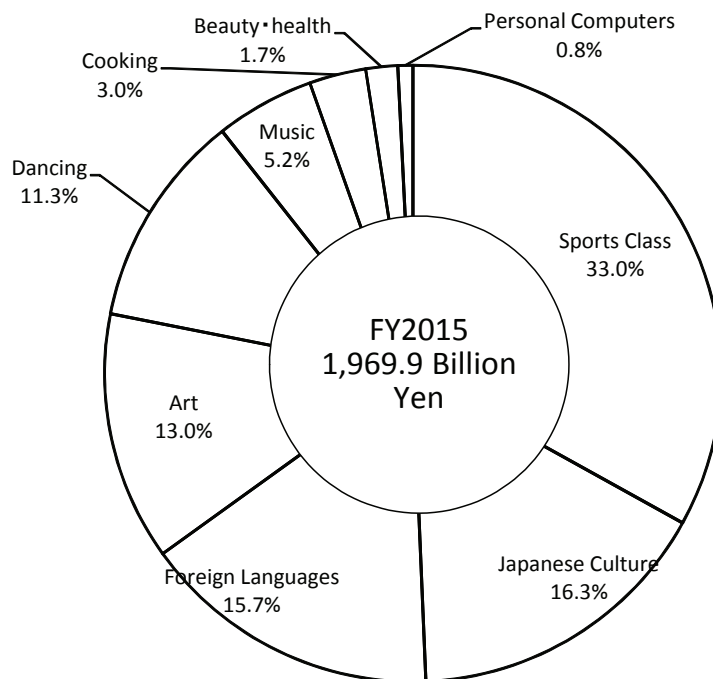
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■ **Figure 1: FY2015 Lessons and Learning Classes Market Size and Market Share by Category**

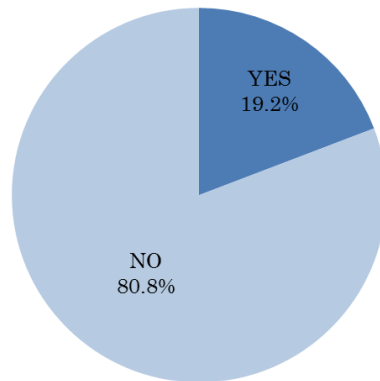


Survey by Yano Research Institute

Notes:

1. The market size is based on the fees for lessons and classes
2. The market indicates the forums where teachers, coaches, masters, or instructors teach techniques, knowledge or culture at classrooms or at schools as a kind of “hobby” of their students or clients (regardless of whether the students may be adults, children, or toddlers.) Note that those classes at vocational schools for developing qualities and skills needed to acquire qualifications and to be professionals are not included.

■ **Figure 2: Whether or Not Have Experience of Self-Education by Using Free Online Video Distribution Services**

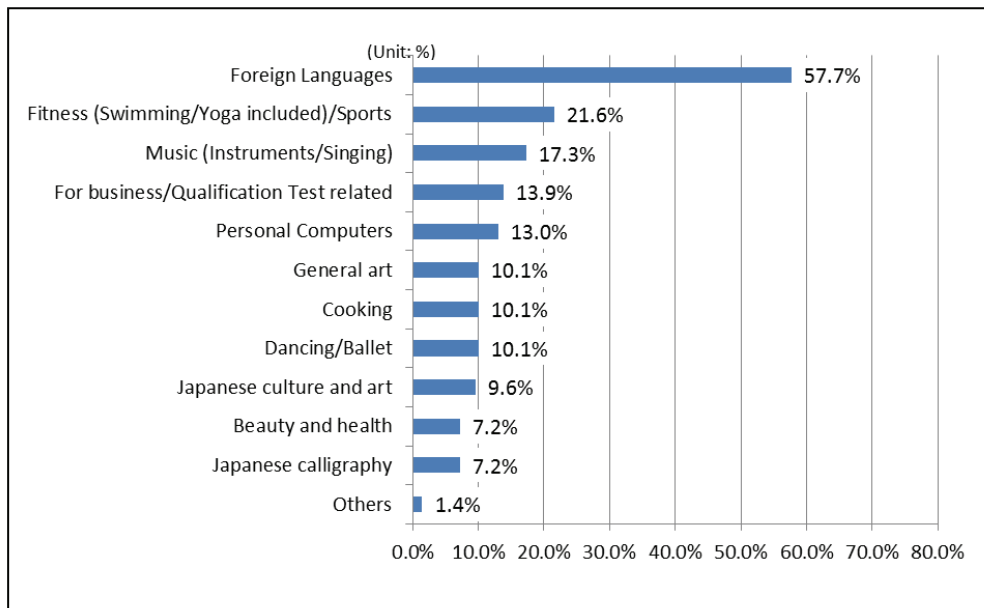


Survey by Yano Research Institute

Note

- The survey (online questionnaire) was conducted during April to May, 2016, targeting 1,083 men and women in their 20s to 60s who responded to the consumer survey and live in the Tokyo Metropolitan area, Kinki area, and other ordinance-designated cities in the country (except for Kumamoto city), and who are currently taking, or have taken within the past year, or have plans within a year to take lessons. The survey method: online questionnaire, single response allowed.

■ **Figure 3: Types of Lessons Self-Learned by Using Free-of-Charge Online Video Distribution Services**

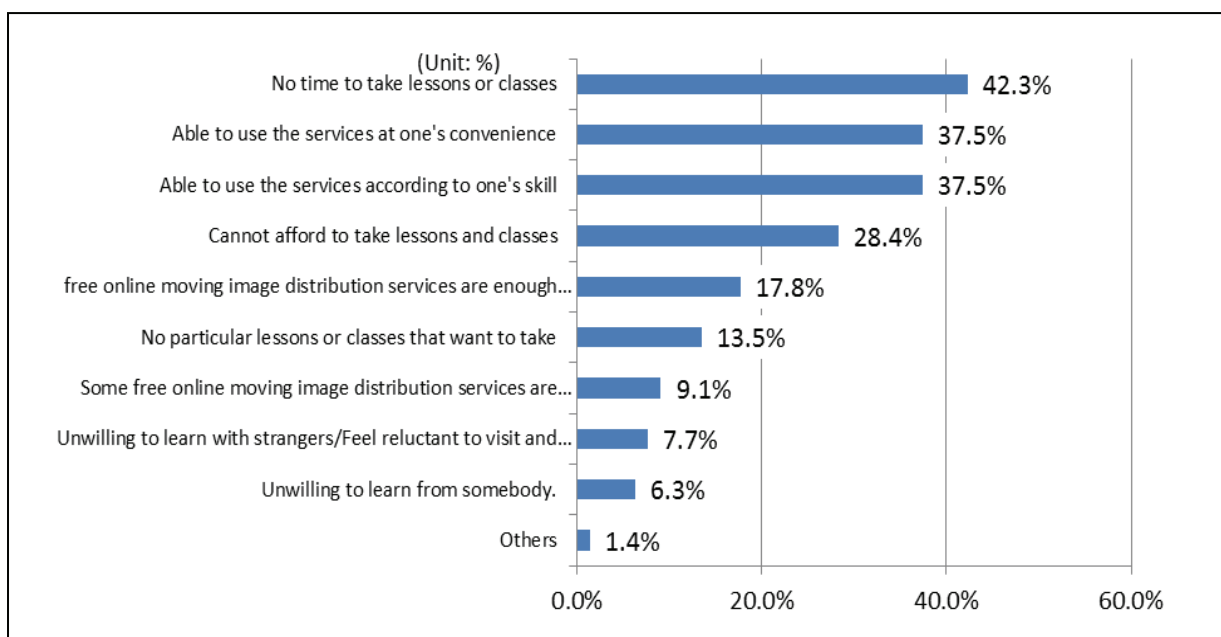


Estimated by Yano Research Institute

Note

- The survey (online questionnaire) was conducted during April to May, 2016. Respondents of Figure3 fall into those 208 people who responded “Yes” to the question whether or not have experience of self-learning lessons by taking free-of-charge online video distribution services out of all the 1,083 men and women respondents in their 20s to 60s living in the Tokyo Metropolitan area, Kinki area, and other ordinance-designated cities in the country (except for Kumamoto city), currently taking, or have taken within the past year, or have plans within a year to take lessons. The survey method: online questionnaire, multiple responses allowed.

■ **Figure 4: Reasons Why Conducted Self-Learning Using Free-of-Charge Online Video Distribution Services**



Estimated by Yano Research Institute

Note

5. The survey (online questionnaire) was conducted during April to May, 2016, targeting 1,083 men and women in their 20s to 60s who responded to the consumer survey and live in the Tokyo Metropolitan area, Kinki area, and other ordinance-designated cities in the country (except for Kumamoto city), and who are currently taking, or have taken within the past year, or have plans within a year to take lessons. The survey method: online questionnaire, multiple responses allowed.