Education Industry Market in Japan: Key Research Findings 2016

◆ Research Outline

<table>
<thead>
<tr>
<th>Yano Research Institute has conducted a study on the domestic education industry market with the following conditions:</th>
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<tr>
<td>1. Research period: From July to September, 2016</td>
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<td>2. Research targets: cram schools, university preparatory schools, schools for qualification exams, language schools, cultural hobby centers, cooking schools, classes for infants, gymnastics classes, corporate/business training service providers, e-learning companies, learning material/correspondence education/learning software companies, educational toy companies, education industrial organizations, education-related governmental organizations, and etc.</td>
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<td>3. Research methodologies: Face-to-face interviews, survey via telephone/FAX/email and literature research</td>
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<td>What is the education business?</td>
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<td>This research regards that the following twelve major fields constitute the education industry market: Crams schools and university preparatory schools, English conversation and other language schools, schools for acquisition of qualification, qualifying examination, cultural hobby centers, special education for the gifted infants, corporate business trainings, e-learning, correspondence education for infants, correspondence education for students, correspondence education for grown-ups, and English learning materials for infants</td>
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◆ Key Findings

- Entire education industry market size (total market size of all major twelve categories) in FY2015 declined slightly from the previous year to 2,500.6 billion yen, with the market of 5 categories expanded, 1 category remained the same level, and other 6 declined
- Market of cram schools and university preparation schools in FY2015 grew by 2.0 % on year-over-year basis to attain 957.0 billion yen. The market expanded for two years in a row, in spite of the concerns over market decrease from a long-term point of view due to declining birthrate
- Market of English conversation and other language schools in FY2015 rose by 1.0 % on Y-o-Y basis to attain 310.0 billion yen, driven by business needs and rising demands for early English education for children
- Corporate business trainings market in FY2015 rose by 2.3% to achieve 497.0 billion yen, increasing demands of training for new employees and wider acceptance of those training services provided with fixed-charge or low-price
◆ Report format
  Published report: “Education Industry 2016”
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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 and Forecast of Cram School and University Preparatory School Market Size

Figure 2: Transition and Forecast of Schools for Acquisition of Qualification Market Size

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

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Figure 3: Transition and Forecast of English Conversation and Other Foreign Language School Market Size

![Bar chart showing market size from FY2012 to FY2016.](image)

Note:
3. The market size is based on sales of the businesses.

Figure 4: Transition and Forecast of Qualifying Examination Market Size

![Bar chart showing market size from FY2012 to FY2016.](image)

Note:
4. The market size is based on sales of the businesses.
5. Part of the market size has been recalculated.

Figure 5: Transition and Forecast of Correspondence Education Market Size

![Bar chart showing market size from FY2012 to FY2016.](image)

Notes:
6. The market size is based on sales of the businesses
7. Figures are the total of correspondence education for children, students (of elementary, junior high, and high school, and high-school graduates), and adults.
8. The market size has been recalculated retroactively.

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Figure 6: Transition and Forecast of Corporate Business Training Services Market Size

![Chart showing market size from FY 2012 to FY 2016.](image)

Note:
9. The market size is based on sales of the businesses.

Estimated by Yano Research Institute

Figure 7: Transition of e-Learning Market Size

![Chart showing market size from FY 2012 to FY 2016.](image)

Note:
10. The market size is based on sales by businesses
11. e-learning includes education system services through internet/intranet/satellite communications, mobile gaming, mobile phone (including smart phones), mobile digital music players, and learning software (including gaming).

Estimated by Yano Research Institute

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