Education Industry Market in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a study on the domestic education industry market with the following conditions:
1. Research period: From July to September, 2017
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 service providers, correspondence education service providers, learning software companies, educational toy companies, education industrial organizations, government offices, etc.
3. Research methodologies: Face-to-face interviews, survey via telephone/FAX/email and literature research

What is the education industry market?
The education industry market in this research indicates the following twelve major fields: Crams schools and university preparatory schools, English conversation schools/other language schools, schools for acquisition of qualification, qualifying examination, cultural hobby centers, special education for the gifted infants, corporate business training services, e-learning, correspondence education for infants, correspondence education for students, correspondence education for grown-ups, and English learning materials for infants.

◆ Key Findings

- Entire education industry market size (total market size of all major twelve categories) in FY2016 rose slightly by 0.6% from the previous year to have achieved 2,516.2 billion yen, with the markets of 7 categories expanded: (Crams schools and university preparatory schools, schools for acquisition of qualification, English conversation schools/other language schools, etc.)

- Market of cram schools and university preparation schools in FY2016 grew by 0.5% on Y-o-Y basis to attain 962.0 billion yen. The sales performances differ by the market players, due to fiercer market competition.

- Market of schools for acquisition of qualification in FY2016 rose by 1.1% on Y-o-Y basis to attain 190.0 billion yen. The market used to stay the same level but has enjoyed slightly rising tendency since FY2016.

- Market of English conversation schools/other language schools in FY2016 rose by 1.0% on Y-o-Y basis to achieve 313.0 billion yen. The market both for adults and infants/children continues expanding.
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Figure 1: Transition and Forecast of Cram School and University Preparatory School Market Size

![Chart showing the transition and forecast of Cram School and University Preparatory School Market Size from FY2013 to FY2017 (Forecast)].

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

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

![Chart showing the transition and forecast of Schools for Acquisition of Qualification Market Size from FY2013 to FY2017 (Forecast)].

Note:
2. 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 for Figure 3](chart1.png)

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

Figure 4: Transition and Forecast of Qualifying Examination Market Size

![Bar Chart for Figure 4](chart2.png)

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

Figure 5: Transition and Forecast of Correspondence Education Market Size

![Bar Chart for Figure 5](chart3.png)

Notes:
6. The market size is based on the sales of businesses
7. Figures are the total of correspondence education for children, students, and adults.

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

(Hundred Million Yen)

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017 (Forecast)</th>
</tr>
</thead>
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<td>Value</td>
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<td>4,860</td>
<td>4,970</td>
<td>5,080</td>
<td>5,170</td>
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</table>

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

**Figure 7: Transition of e-Learning Market Size**

(Hundred Million Yen)

<table>
<thead>
<tr>
<th>Year</th>
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<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017 (Forecast)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
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<td>1,665</td>
<td>1,657</td>
<td>1,767</td>
<td>1,794</td>
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</tbody>
</table>

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