

Language Business Market in Japan: Key Research Findings 2012

◆ **Research Outline**

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

1. Research target: Foreign language schools, publishers of language education materials, manufacturers of electronic dictionaries, suppliers of hardware and software for language learning, language service providers: Companies and organizations in e-learning business/ correspondence education, those selling language study materials, those organizing/operating qualification exams, those arranging overseas education, those in interpreting and translating business, and etc.
2. Research period: April to June, 2012
3. Research methodologies: Face-to-face interviews mixed with surveys through telephone/FAX

<What is language business market?>

Language business market in this research indicates markets of overall foreign language classes, deployment of teachers to kindergarten/day-care centers for children, textbooks, self-learning language hardware/software, electronic dictionaries, textbooks of English conversation classes for children, correspondence education, e-learning, software, language exams, overseas-education arrangement, interpretation/translation business, foreign language education other than English (correspondence and school attending.) Note that markets of language exams, overseas-education arrangement, and interpretation/translation business are defined here as “peripheral businesses.”

◆ **Key Findings**

■ **Language Business Market in FY2011 Estimated to Increase from Previous Year**

Language business market, together with its peripherals (i.e. markets of language exams, overseas-education arrangement, and interpretation/translation business), is estimated as 768.7 billion yen for FY2011, an increase by 2.6 % year-on-year. Language business market without peripheral business is estimated at 510.8 billion yen, an increase by 2.2% from the previous year.

The continuous market growth stems from globalization of companies, which is causing more companies sending employees to language-learning courses and more business persons eager to learn foreign languages. Although damaged buildings and blackouts after the Great East Japan Earthquake had temporarily hampered the lessons, the influence of such damages was very limited from the full-year point of view.

■ Further Globalization and Revised Curriculum Guideline Boost Market Size

Just like FY2011, the market continuously expects growth for FY2012 due to business-oriented demands from globalization of companies. Also, revised curriculum guidelines for junior-high English classes that begin at FY2012 and English-only spoken classes in high schools to be started in FY2013 are driving students' demands.

The size of language business market including its peripheral business in FY2012 is expected to grow at 789.7 billion yen, up by 2.7% from the previous year, and the market without the peripheral business for FY2012 is estimated at 519.6 billion yen, up by 1.7% compared to the previous year.

◆ Report format:

Published report: "Language Business 2012"

Issued in: June 29, 2012

Language: Japanese

Format: 519 pages in A4 format

Price: 115,500 yen (5,500 yen of consumption tax shall be charged for the sales in Japan.)

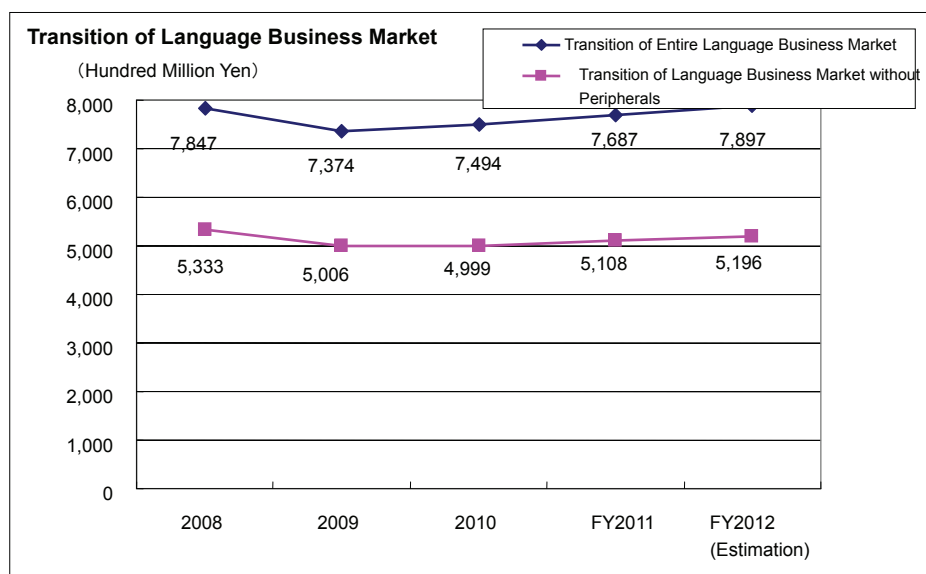
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■ Transition of Estimated Size of Language Business Market

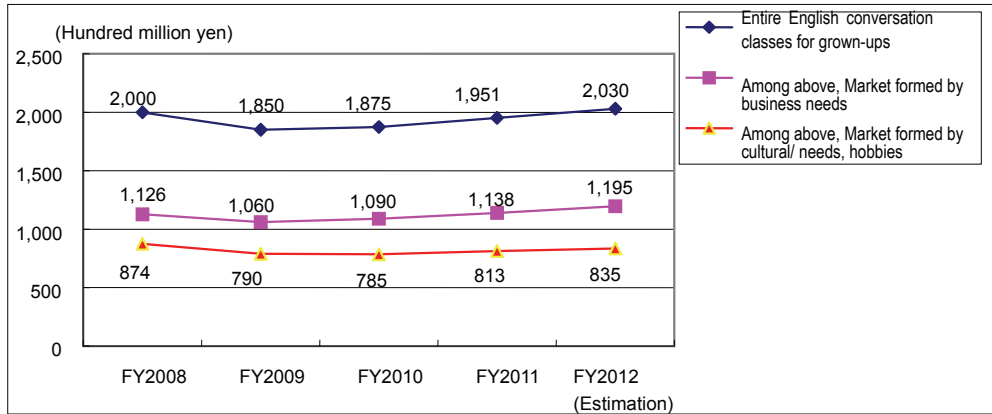


Estimated by YRI

Note:

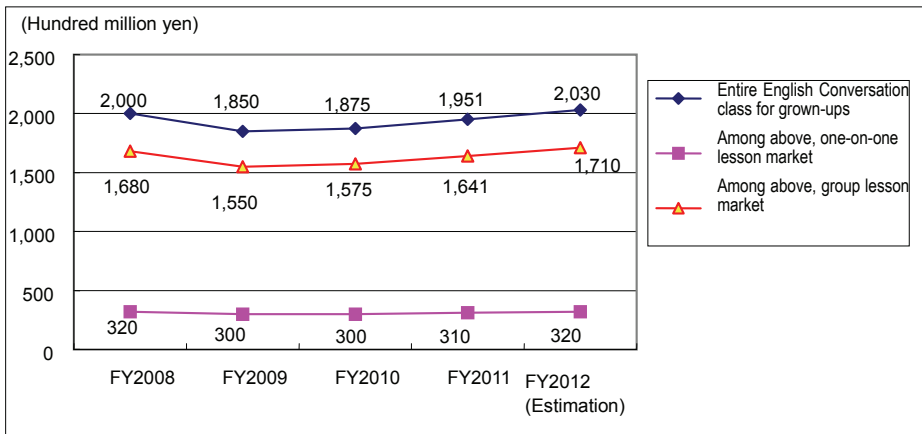
1. Figures are based on turnover from businesses
2. Markets of language exams, overseas-education arrangement, and interpretation/translation business are defined here as "peripheral businesses."

■ Transition of Estimated Market Size by Needs



Estimated by YRI

■ Transition of Market Size by Form of Class



Estimated by YRI

Note:

3. Figures are based on turnover from businesses