



# The ELT market in Japan: updates & current trends

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## Current market environment

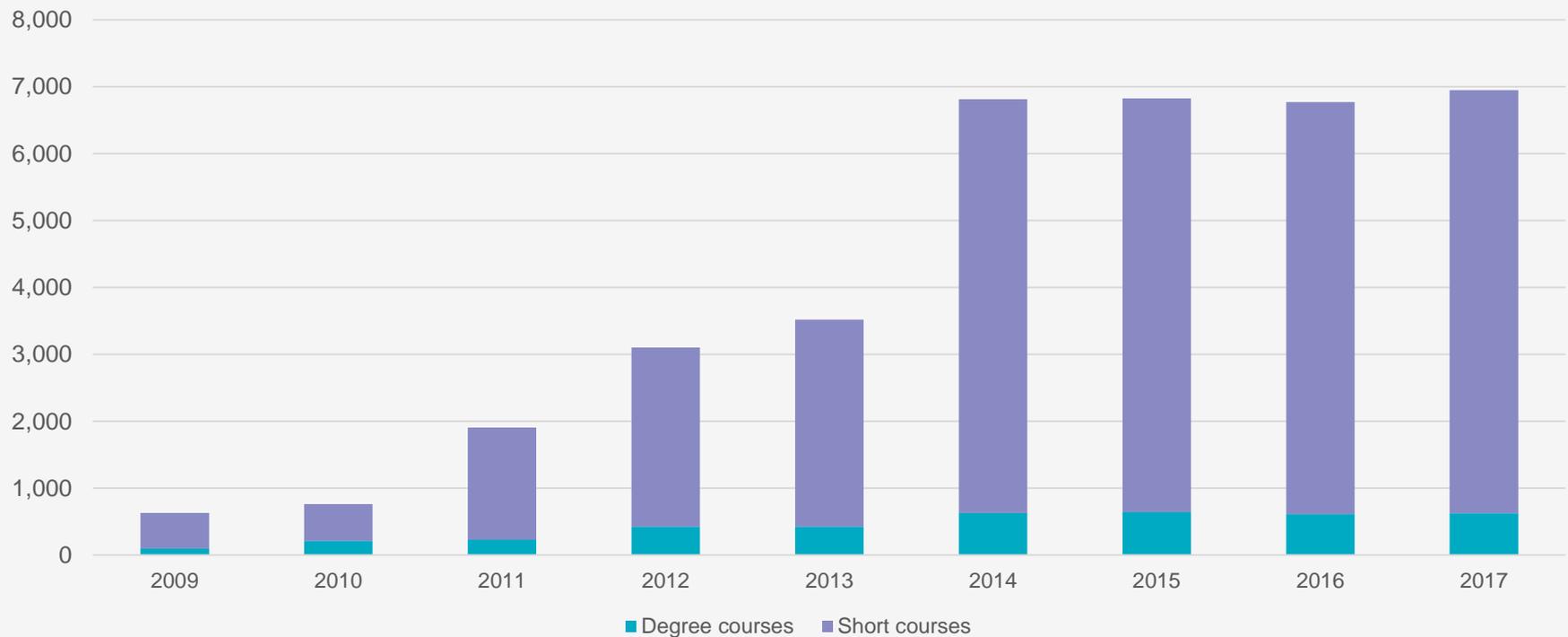
- Major reform in the English education system and entrance exams to enter Japanese universities will result in further increase in demand for studying communicative English at younger ages
- Continued growth in demand for English language learning in general:
  - Business (online training particularly popular, +11%)
  - Seniors (aspiration to be volunteer interpreters for increasing tourists/Tokyo 2020)

(Source: Yano Report 2016-2017)

## Current market environment (cont'd)

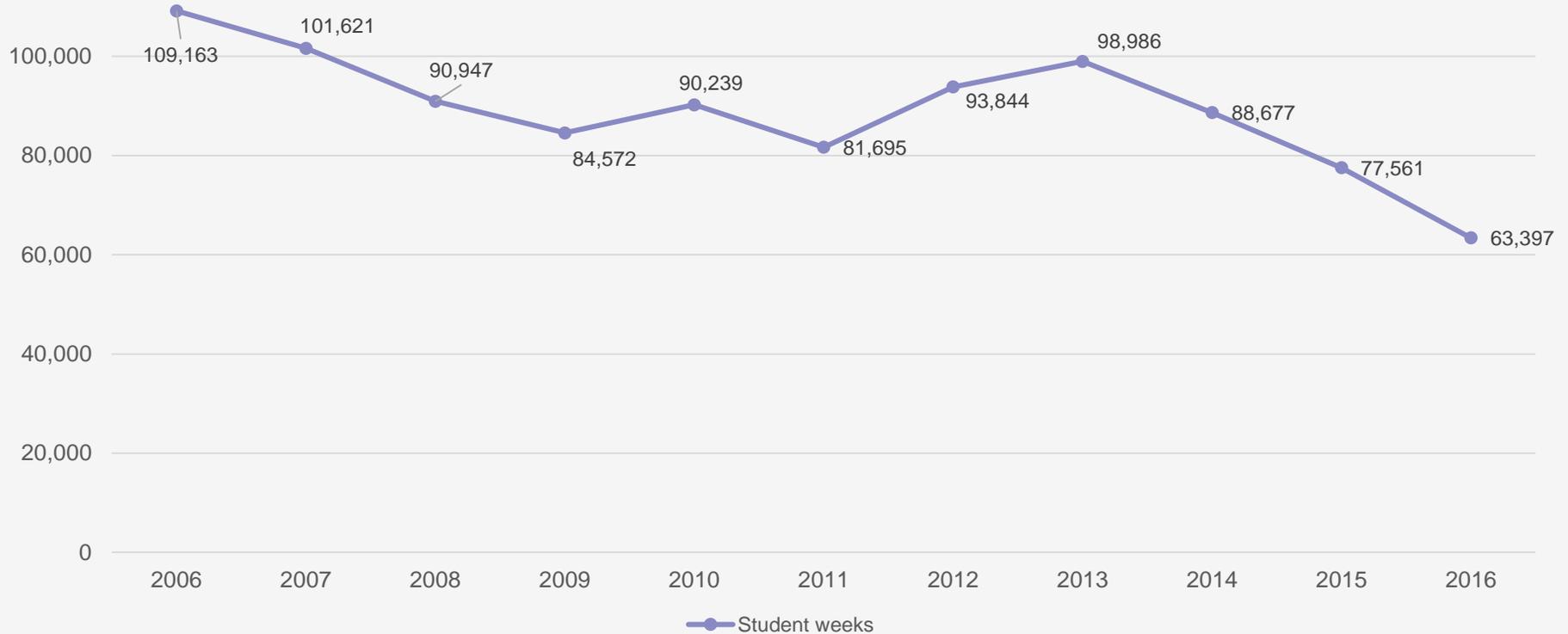
- Study abroad while studying at high schools and universities has become far more “common” than in the past -
  - Government support for outward mobility for Japanese students (increased number of scholarships)
  - Increased awareness about changes in the job market and skills required to succeed

## Government scholarships for Japanese students studying abroad



Source: MEXT

## Evolution of Japanese student weeks at English UK members



Based on English UK annual stats reports (private sector member data)

## Challenges & risks

- Impact of political changes in UK/US? Brexit & Trumpism?
- Perception of security risks in Europe – impact on young learner market – cancellations reported in summer 2017
- Strong competition from Australia, Canada and NZ – perception as safe and cheaper destinations
  - 2017 TOBITATE survey result ranks UK the 3rd most popular for parents (after US and Canada), and 4th most popular for students (after US, Canada, and Australia)
- The Philippines (30,000 in 2015) gaining popularity for its reasonable price, improved quality, attraction of seaside resorts, “Oyako Ryugaku” (parent and child study abroad)
- Perception of the UK as a more expensive and ‘difficult’ destination

## Opportunities

- EUK statistics – Japan remains among the top 10 source markets
- Strong demand from some segments
  - Summer school for young learners
  - Advanced learners
  - Teacher training
  - Seniors
- Government initiative to increase study abroad at high school level
- The UK remains and will remain a popular destination for Japanese students – brand UK is strong –
  - The Royal Family, Duchess of Cambridge, ‘The Crown’
  - Japanese celebrity’s son is attending a British boarding school
  - Princess Kako is studying at the University of Leeds
  - Rugby – World Cup 2019, Eddie Jones

Over to the panel...

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