

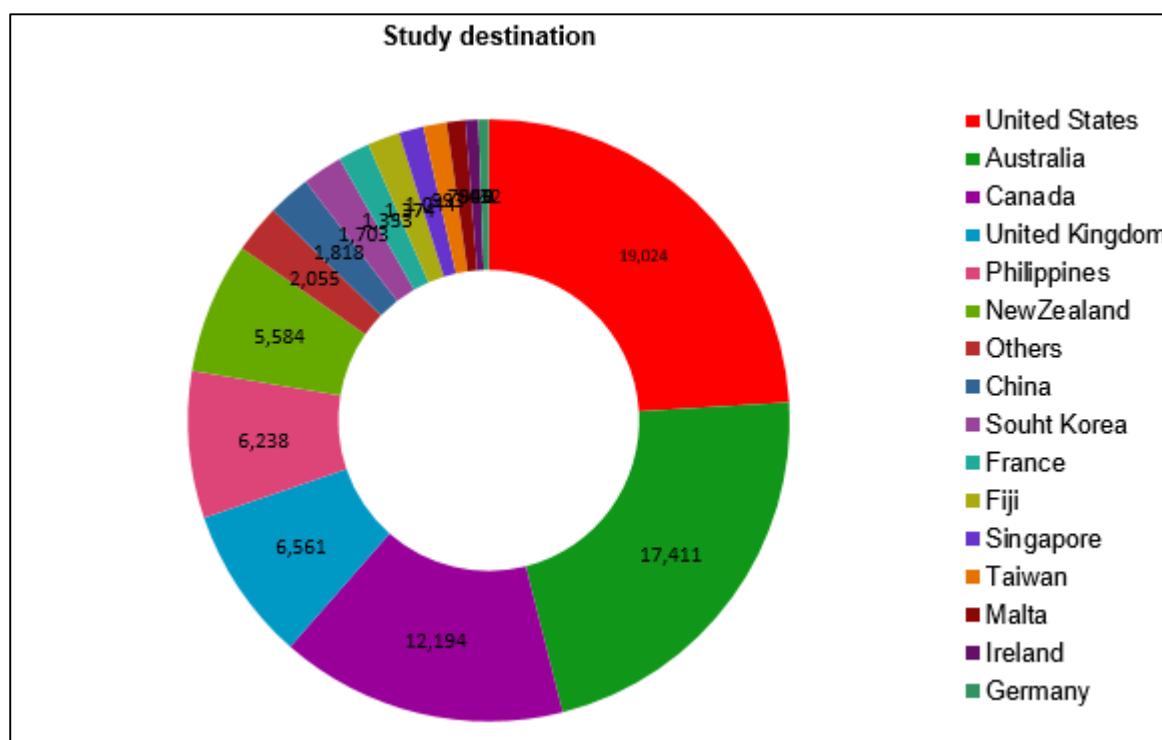
Press Release

Number of Japanese studying abroad, including working adults, appears to exceed 200,000

-“JAOS 2017 Survey on the Number of Japanese Studying Abroad” Report-

[Introduction]

JAOS aims to promote the healthy development of the study abroad industry and provide instruction and guidance to improve and maintain quality of service providers in Japan. JAOS consists of 66 private and public-sector organizations based in Japan. In August 2017, JAOS organized the “JAOS 2017 Survey on the Number of Japanese Studying Abroad”, a survey of 40-member education agencies that provide study abroad services. The survey collected from these 40 organizations the number of Japanese who used their study abroad support services. As a result, JAOS survey revealed that these 40-member education agencies helped nearly 80,000 people (79,123) study abroad in 2016. Taken together with the results of other surveys conducted by various entities in Japan, these numbers suggests that we can surmise that more than 20,000 Japanese people studied abroad during the year.

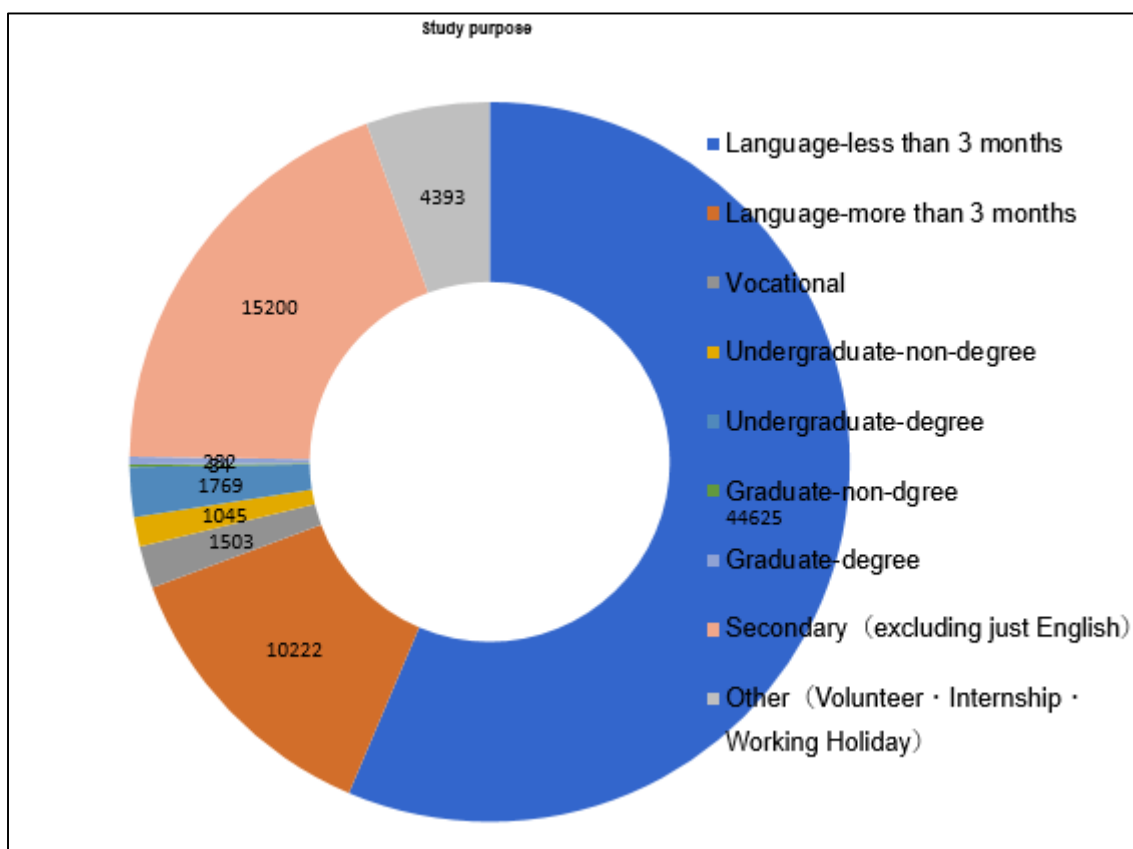


*Reference attached: Number of Japanese people studying abroad by country, “JAOS 2017 Survey on the Number of Japanese Studying Abroad”

[Background of the survey]

Prior to this JAOS survey, most widely publicized statistics on the number of Japanese people studying abroad were provided by the Japan Student Services Organization (JASSO)’s “Survey of Japanese Students Studying Abroad Based on Student Exchange Agreements between universities”,

and from surveys published by the Ministry of Education, Culture, Sports, Science, and Technology (MEXT), for example the OECD survey. However, MEXT statistics include only Japanese people who study at overseas institutions of higher education such as universities or graduate schools. JASSO also include only those students who study abroad via Japanese universities. It means that the surveys did not include students who do not use a university program to go abroad, junior high school students who study abroad, or working adults who go abroad to study a language. These omissions led JAOS to conduct a new yearly survey of its own to produce statistical data that includes junior high school students and working adults: the “JAOS Survey on the Number of Japanese Studying Abroad”. Our goal is to paint a more accurate picture of the number of Japanese people studying abroad and thereby help the study abroad industry develop appropriately.



*Reference attached: Number of Japanese people studying abroad by country, “JAOS 2017 Survey on the Number of Japanese Studying Abroad”

[Summary of the numbers revealed by the survey]

Country	Language -less 3M	Language -more 3M	Vocational	Undergraduate non-degree	Undergraduate degree	Graduate non-degree	Graduate degree	Secondary (excluding language only)	Other (Volunteer · Internship · Working Holiday)	Total
United States	8,862	2,539	318	544	680	26	144	4,998	913	19,024
Australia	10,353	1,412	126	133	534	25	88	3,662	1,078	17,411
Canada	7,191	1,980	36	75	154	0	1	2,455	302	12,194
United Kingdom	3,877	817	62	116	79	14	16	1,528	52	6,561
Philippines	5,254	638	2	0	0	0	0	34	310	6,238
New Zealand	2,014	549	51	47	159	17	4	2,405	338	5,584
Others	1,094	52	9	3	89	1	19	22	766	2,055
China	1,177	577	0	9	21	1	1	8	24	1,818
South Korea	1,054	510	0	25	24	0	0	9	81	1,703
France	338	147	821	17	5	0	4	6	36	1,374
Fiji	813	440	0	0	0	0	0	0	0	1,353
Singapore	642	23	0	15	12	0	4	54	294	1,044
Taiwan	442	336	0	46	6	0	0	9	154	993
Malta	737	52	0	0	0	0	0	0	1	790
Ireland	423	100	1	1	1	0	0	8	15	549
Germany	254	50	77	14	5	0	1	2	29	432
Total	44,625	10,222	1,503	1,045	1,769	84	282	15,200	4,393	79,123

*For this survey, JAOS outsourced to a neutral third-party organization to survey 40 JAOS member education agencies which provide study abroad services to provide the number of students they helped send abroad.

*Student numbers from study abroad education agencies that are not members of JAOS are not included in this survey.

[Study abroad trends in 2016]

1) Europe and North America hold a large share of the market, but Asia's share rose significantly to over 17%

Countries in North America, Europe, and Oceania remain unquestionably the most popular destinations for Japanese people who study abroad, receiving over 80% of all students. However, Asian countries such as the Philippines, Singapore, China, South Korea, and Taiwan received over 17% of all students, indicating that there is a sizeable number of Japanese people studying in Asia.

2) Among these Asian countries, the Philippines is enjoying the largest increase in popularity, surpassing New Zealand to take fifth place

The Philippines have become a popular study abroad destination in recent years. On the list of countries that receive the most Japanese students, the Philippines ranked in the top 5 behind the United States, Australia, Canada, and the United Kingdom, leaping over New Zealand.

3) Junior high school students and high school students account for 19.2% of the total number of Japanese studying abroad

As the 2020 reform of the university entrance examinations approaches, English education in Japan is undergoing dramatic changes. English instruction in junior high schools and high schools is also being revised. Study abroad option appears to attract as a way to motivate students by helping them realize the value and impact of language study and its importance to help students accumulate many hours of practical speaking lessons in a way that is impossible to attain inside Japan.

[Study abroad trends in the future]

1) The 2020 reform of the university entrance examinations will encourage students to go abroad at a younger age

Continuing a trend first seen in 2016, students will continue to go abroad at a younger age as the 2020 reform of the English entrance examination approaches. We can surmise that increasing numbers of students will go to study abroad accompanied by their parent(s) and increasing numbers will go during junior high school. As English instruction in elementary schools continues to change, we believe that the number of elementary school students who go to study abroad will also increase.

2) The number of Japanese students continuing their education at overseas universities will increase

It is likely that examinations such as Eiken, TOEFL, and IELTS will be used as part of the 2020 reform of the English entrance examination. As high school students upgrade their ability to communicate globally in English, the number of students who attain eligible level scores to apply to overseas universities will increase as well. We can infer that by, or around 2020, the number of high school students who aspire to pursue their education at overseas institutions instead of Japanese universities will increase.

3) The globalization of Japanese companies and increasing inbound tourism demand will lead to more working adults studying abroad

As the globalization of Japanese companies continues year in year out, there is a great demand within companies for people who can communicate in English on a practical business level. An increasing number of working adults are sent abroad for corporate training and in similar contexts. In addition, an increasing number of working adults are taking paid leaves to study abroad for one or two weeks, particularly career-oriented people in their twenties and thirties. However, the number of working adults who choose to study abroad with an eye on their career or lifestyle while they consider new career options is also on the rise. As inbound tourism demand brings increasing numbers of foreigners to Japan, Japanese people who originally did not consider going abroad will increasingly realize a need for language study abroad, particularly those who are employed in the tourism or service industries.

[The number of Japanese studying abroad appears to exceed 200,000]

This survey enabled us to deliver information about Japanese people who go to study abroad via private education agencies, especially working adults. These students had not been counted by other surveys on Japanese people studying abroad. If we combine the statistics obtained by JAOS with those presented by JASSO and MEXT, and if we also add in the likely number of students who go abroad via education agencies that are not members of JAOS, our most educated estimate suggests that the real number of Japanese people who study abroad every year now exceeds 200,000 or is at least very close to reaching 200,000. It is difficult to obtain precise statistics of the total number of

students. However, JAOS will continue to expand the reach of its “JAOS Survey on the Number of Japanese Studying Abroad” to deliver correct information and contribute to the development of the entire study abroad industry in Japan.

Referential information

-Ministry of Education, Culture, Sports, Science and Technology (MEXT), “Status of Japanese Studying Abroad” (released in March 2017): 53,197 people

*Summary of statistics from the OECD, etc. Mainly Japanese students who are studying abroad at institutions of higher education.

-Japan Student Services Organization (JASSO), “Survey of Japanese Students Studying Abroad Based on Student Exchange Agreements” (released in March 2017): 54,455 people

*The number of Japanese university students who went abroad via a study abroad program or the like organized by a Japanese university. About 90% studied abroad for less than one year.

[General information about the statistical survey]

Period: January 1st, 2016 - December 31st, 2016

Surveyed: 40 JAOS member education agencies that provide study abroad services

[About JAOS]

Established in 1991, our mission is to promote the healthy development of the study abroad industry in Japan by establishing ethical best practice guidelines for organizations, educating and training study abroad counselors and advisors, and engaging in various other promotional activities to increase awareness of, and further the development of a safe and rewarding environment for Japanese study abroad students.

Recognized by the Japanese government as a General Incorporated Association in 2008, JAOS membership consists not only of private companies but also includes public organizations such as the Australian Embassy Marketing Office and the British Council, as well as various trade-related associations. As of 2018, total membership now exceeds 65 organizations. JAOS is also an active member of the international association FELCA (The Federation of Education and Language Consultant Associations). By representing Japan through this membership, JAOS is able to educate and promote Japanese market needs to industry providers and assist them in developing the optimal study abroad environment for Japanese study abroad students.

[For more information and inquiry]

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