

Press Release

Dominance of America Shifts to Drastic Diversification of Destinations.

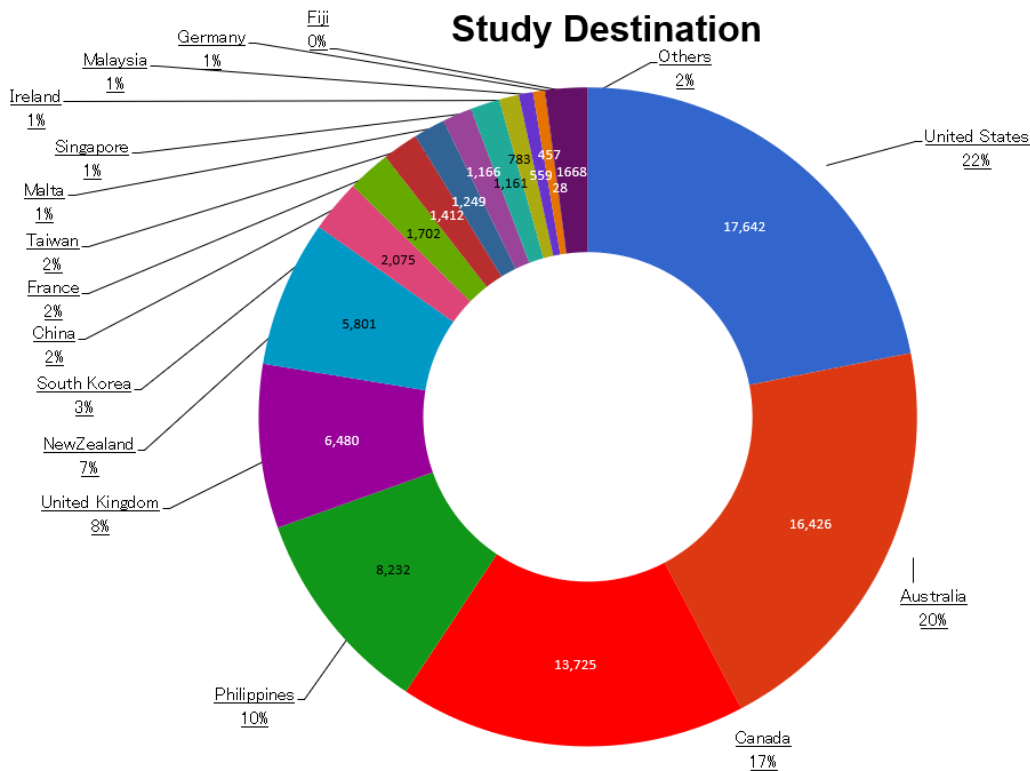
New Era of Study Abroad Destinations Shown in 2019 JAOS Report.

Overall Outbound Study Abroad Students Increase in Japan

-“JAOS 2019 Statistical Report on Japanese Studying Abroad”

[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 72 private and public-sector organizations based in Japan. In August 2019, JAOS organized the “JAOS 2019 Survey on the Number of Japanese Studying Abroad”, a data analysis of 42-member education agencies that provide study abroad services. The survey collected from these 42 organizations demonstrates the trend of the number of Japanese who used their study abroad support services. The survey was answered by all of 42-member organizations, and it reported 80,566 students studying abroad in 2018. The most evident result was the change from the period of American dominance as study abroad destination, and in addition, the trend demonstrated that study-abroad candidates chose from a wider variety of destinations.



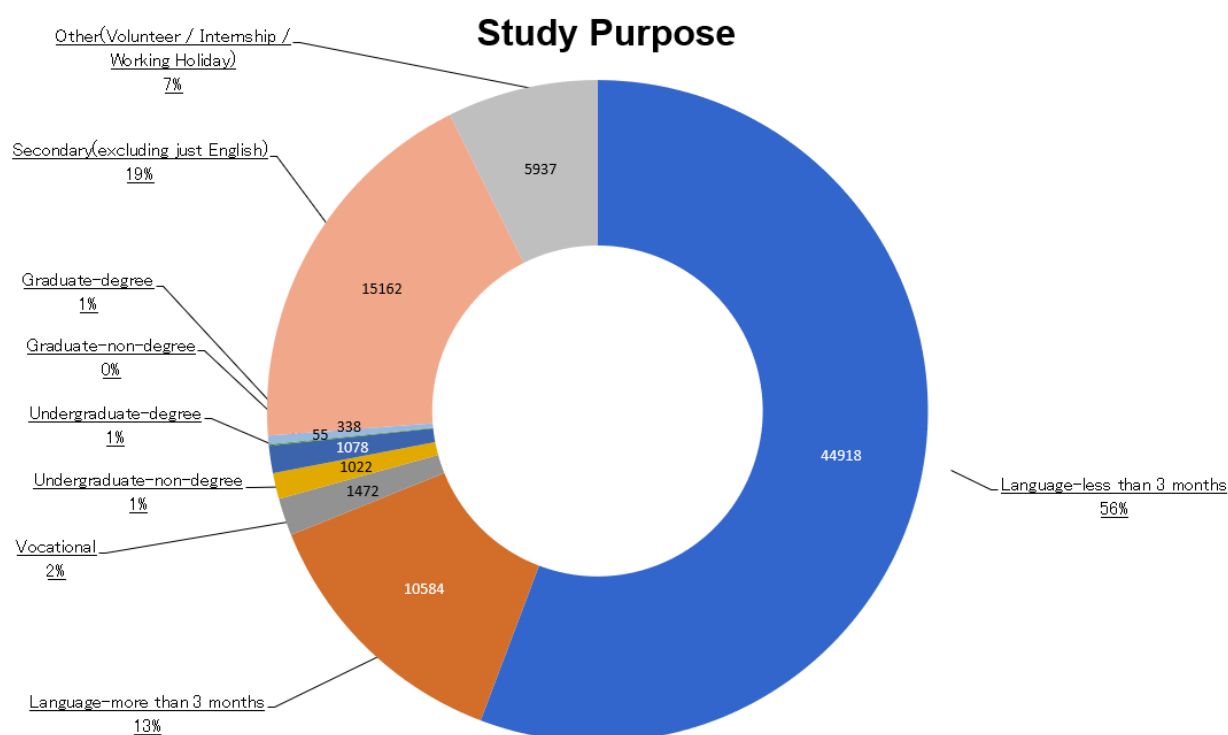
-“JAOS 2019 Survey on the Number of Japanese Studying Abroad” Report-

*Reference attached: Statistics on Study Abroad Destination of Japanese by Country “JAOS 2019 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. Therefore, 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 for language learning purposes. 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.

JAOS used data from this survey and statistics from such groups as JASSO to estimate the number of outbound Japanese study-abroad students in 2018 to be around 200,000.

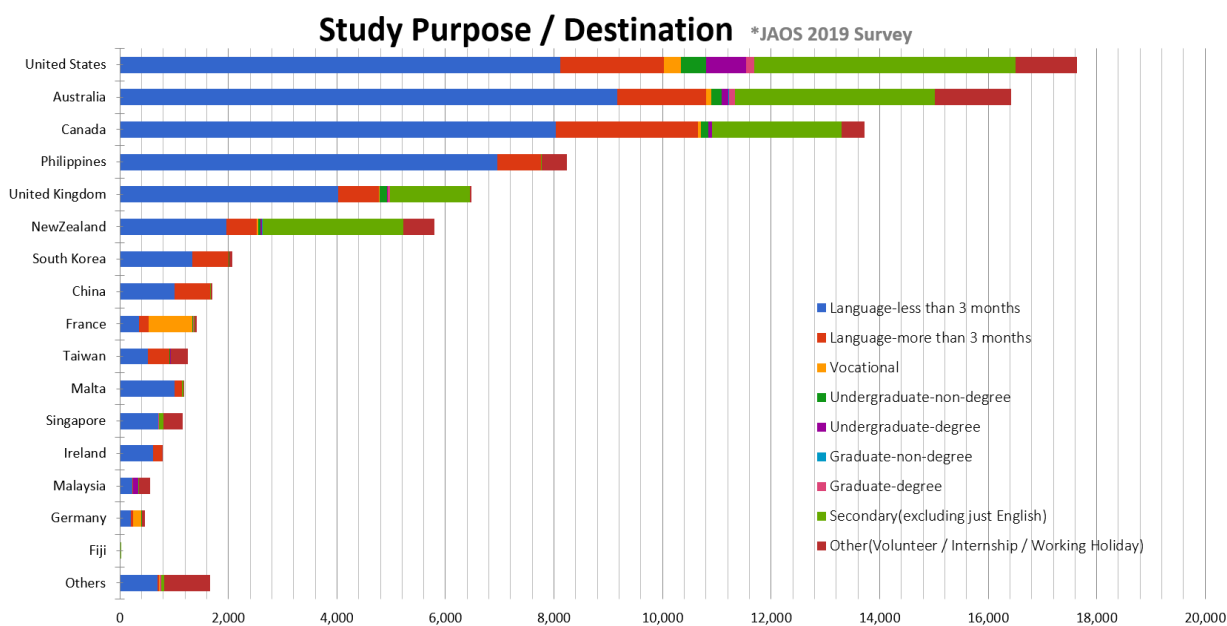


-"JAOS 2019 Survey on the Number of Japanese Studying Abroad" Report-

*Reference attached: Statistics on Study Purpose of Japanese by Country “JAOS 2019 Survey on the Number of Japanese Studying Abroad”

[JAOS Survey Result at a Glance on Study Abroad Purpose]

JAOS 2019 Survey	Language-less than 3 months	Language-more than 3 months	Vocational	Undergraduate-non-degree	Undergraduate-degree	Graduate-non-degree	Graduate-degree	Secondary(excluding just English)	Other(Volunteer / Internship / Working Holiday)	Total
United States	8,121	1,905	311	460	739	9	146	4,810	1141	17,642
Australia	9,159	1,642	100	182	134	13	101	3,681	1,414	16,426
Canada	8,026	2,626	60	132	67	1	2	2,379	432	13,725
Philippines	6,950	809	2	1	0	0	0	7	463	8,232
United Kingdom	4,027	744	17	134	13	7	36	1,467	35	6,480
NewZealand	1,965	563	20	44	19	13	7	2,593	577	5,801
South Korea	1,329	680	0	12	0	0	0	0	54	2,075
China	1,011	655	0	0	0	0	1	10	25	1,702
France	357	173	802	14	0	5	10	18	33	1,412
Taiwan	515	392	0	24	11	0	0	1	306	1,249
Malta	1003	135	0	0	0	0	0	27	1	1,166
Singapore	707	7	0	0	0	0	12	83	352	1,161
Ireland	605	168	0	1	1	0	0	5	3	783
Malaysia	232	7	0	8	88	7	1	16	200	559
Germany	204	41	154	6	1	0	0	3	48	457
Fiji	18	0	0	0	0	0	0	10	0	28
Others	689	37	6	4	5	0	22	52	853	1,668
Total	44,918	10,584	1,472	1,022	1,078	55	338	15,162	5,937	80,566



*JAOS outsourced to a neutral third-party organization to survey 42 JAOS member education agencies who provide study abroad services to candidly report the number of students they helped send abroad.

*Survey does not include numbers from non-JAOS member study abroad agencies.

[Study Abroad Trends in 2018]

Most visible sign was America's continuing decline and losing its dominance as clear front runner of study abroad destination.

The data from JAOS show a three-year declining trend in the number of Japanese students studying in the U.S. The 2017 JAOS report showed that 17,894 students were studying abroad in America, and the number continues to decline in 2018 at 17,642. A survey done by the IIE (Institute of International Education) also shows a decrease in the number of students enrolling in America. One visible sign could be that the current administration and immigration policy is discouraging professional and career minded candidates to move away from the U.S. in fear of not landing a permit to remain to build their career upon completion of intended study. The similar trend is found in many major study-abroad student-sending countries.

2) Rise of the Philippines, Malta, and other study abroad destinations

In Japan, the trend of study-abroad from Japan has always been connected with and reported by media by the number of students studying in the U.S. However, the decrease in the number of Japanese students going to America is not an accurate reflection of overall study-abroad market in Japan these days. On the contrary, the overall number of outbound students is actually increasing in spite of decreasing 18-year old population in Japan, a sign of encouragement in the young generation. . Simply put, more students are going abroad and choosing locations other than America.

For example, looking at the numbers for Europe show that the UK is in decline, but recently, the Mediterranean island of Malta has seen an increase of 30% in students studying there compared to last year, which is a rapid and significant progress. Ireland has also seen an increase of 30% compared to the previous year. Some of the students who chose the U.S. may have switched to Canada, a neighbor on the same continent with more flexible immigration policy, which has seen nearly a 10% increase since last year. In Asia, such countries as the Philippines, Singapore, and Malaysia are popular, but especially the Philippines, which overtook the UK as the number four destination last year, has seen a 20% increase, and is in its path to overtaking Canada and Australia in the coming years. Furthermore, reports on the Philippines and Malta also suggest continuing growth in foreseeable future.

3) Study abroad increases as companies demand more practical English ability

The field of study for students going abroad grew the most last year in language training. Several of JAOS member companies provided their insights to this trend as due to companies having higher and higher expectations for new-hire to possess English ability at the time of application, and English proficiency is rapidly becoming as a critical criteria for management-level positions in Japanese companies aiming to expand to the global market.

Stemming from this trend, we are seeing an increase in both university students seeking language training abroad and professionals looking to advance their career opportunities by enhancing their language ability both on their own and also as company sponsored trainees. Many who study abroad for a period longer than three months are either university students who take a break from their studies, or professionals who put their career to a halt to enhance their career potential and opportunities.

[On JAOS Statistical Survey]

Period: January 1st, 2018 - December 31st, 2018

Surveyed: 42 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 2019, total membership now exceeds 70 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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