

<Release Title>

**Study Abroad seekers among Japanese more than doubled in 2023, recovering to 83% of Pre-Covid 2019. Study Abroad from Japan to Asia hits all time high.**

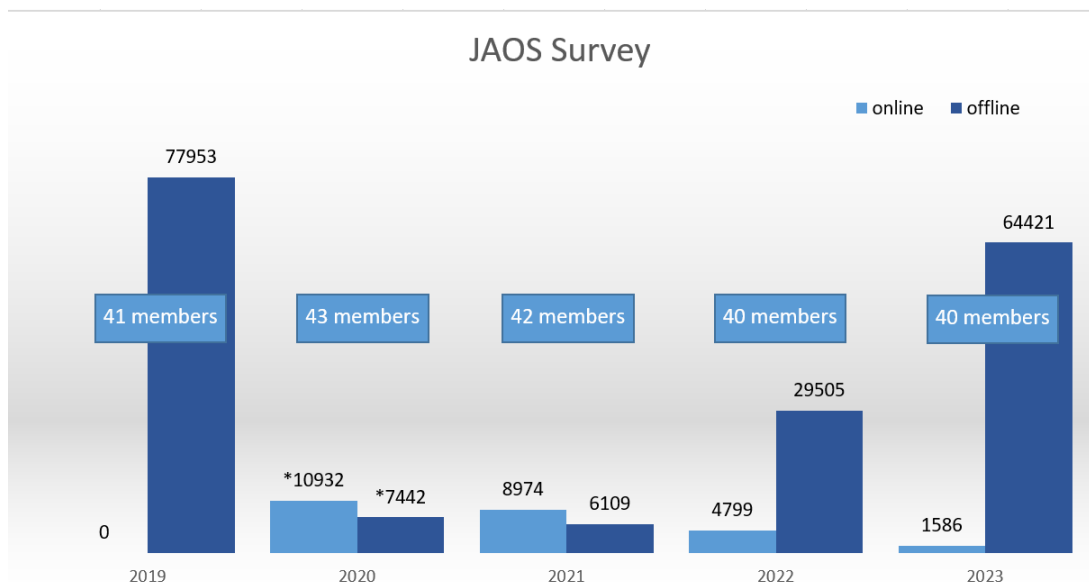
~JAOS Annual Survey ~

### Study Abroad Numbers by Japanese in 2023

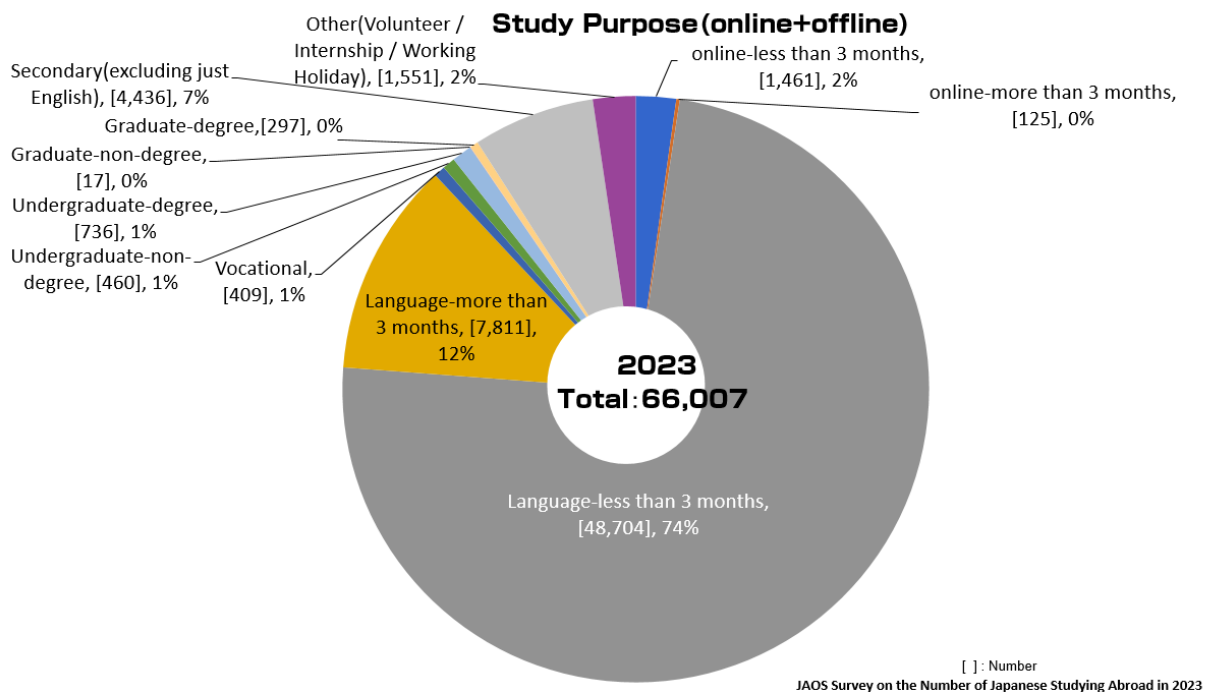
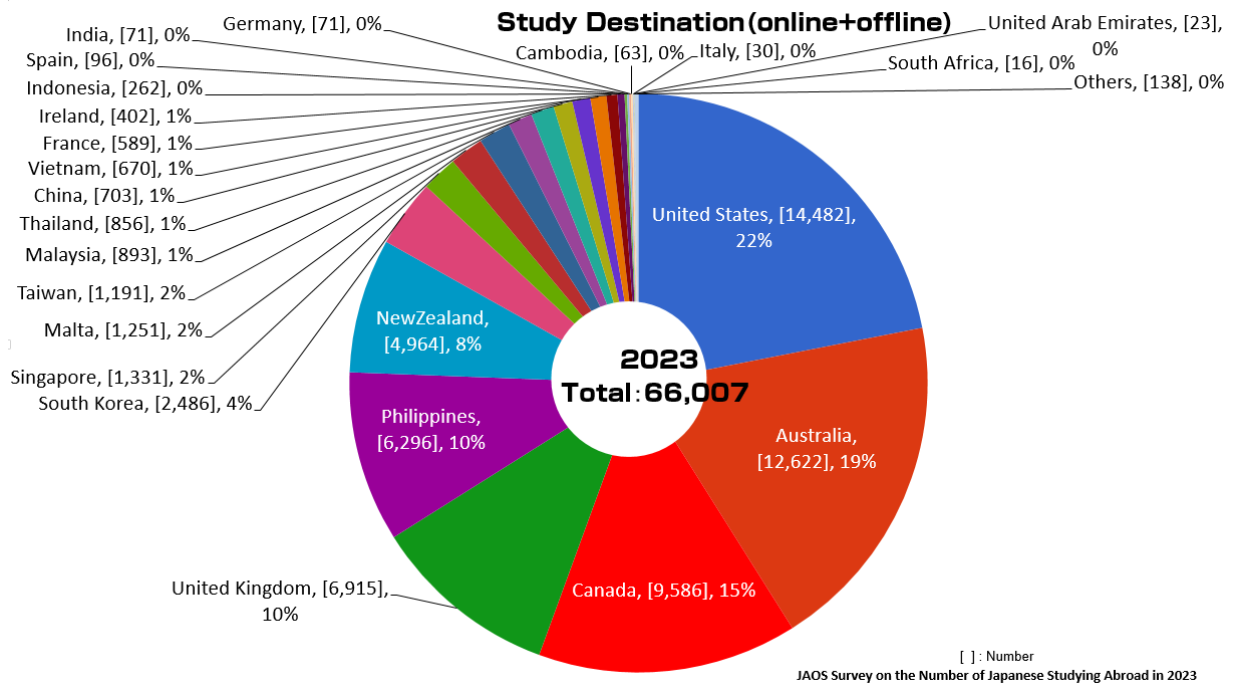
<Summary Text>

JAOS comprises 64 organizations, including private education agents and overseas government agencies, to promote the healthy growth of study abroad businesses and study abroad programs in Japan. In April 2024, JAOS conducted its annual survey to research the volume of Japanese students studying abroad targeting 40 education agent members of JAOS., with the results compiled into the "JAOS Survey Report 2023". As a result, it was found that the total number of study abroad students for the year 2023 from the 40 member companies of JAOS was 66,007 (including online study abroad). Offline study abroad has recovered to 83% of the pre-COVID 2019 levels, a 218% increase compared to the previous year. Particularly noteworthy is the number of Japanese study abroad students to Asian regions such as the Philippines, Malaysia, Singapore, and Korea, which has reached 112% of the pre-COVID 2019 levels, surpassing those of Europe, North America, and Oceania, which have not yet exceeded their 2019 figures.

※ Survey are conducted to 40 full membership organizations of JAOS.



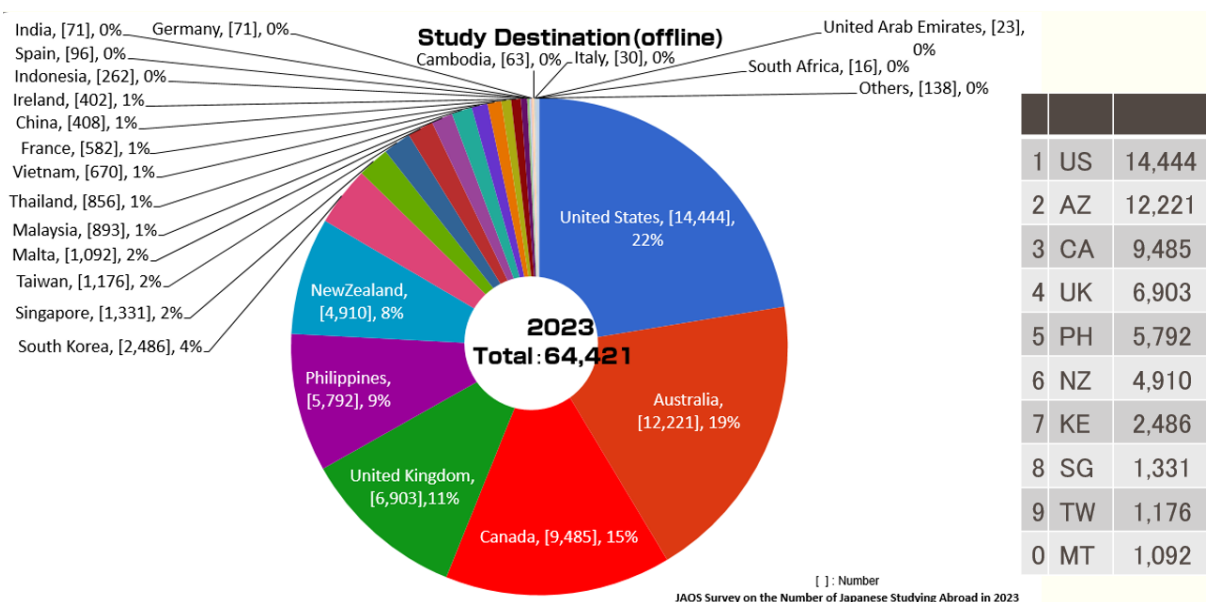
"Survey of Japanese Study Abroad Students by JAOS in 2023"



※ Number of Japanese Study Abroad Students by Study Abroad Destination Purpose  
"JAOS Survey Report 2023"

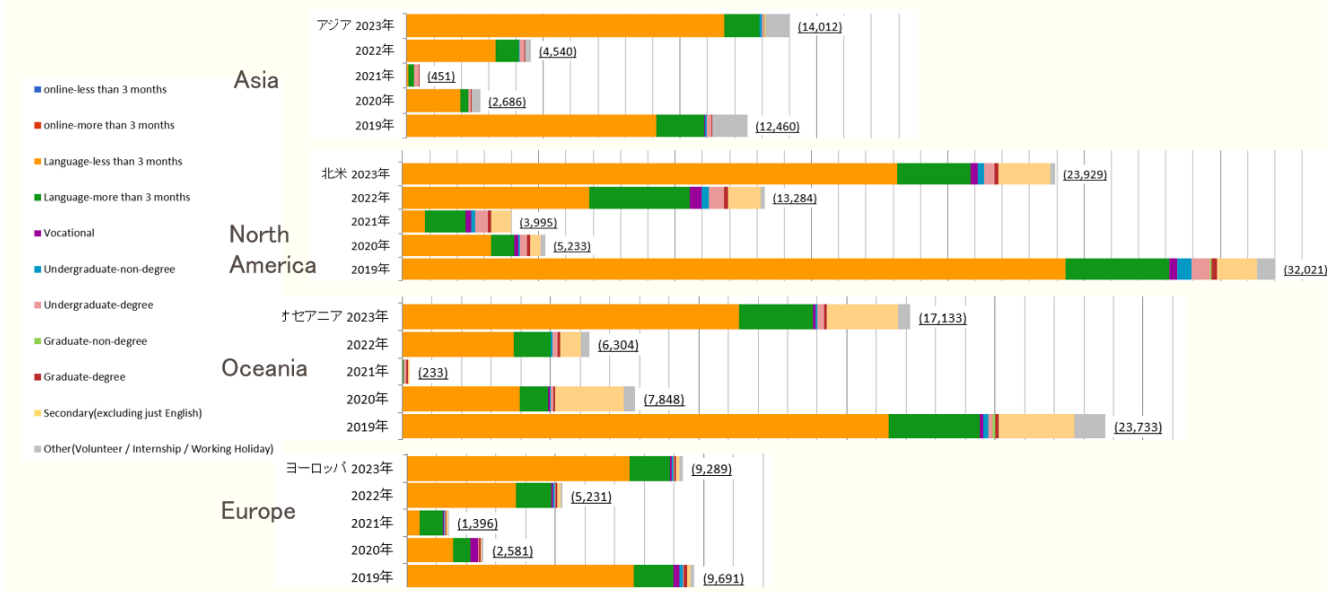
### 【Survey Background】

In 2023, the Kishida Cabinet declared to increase the number of Japanese students going abroad to 500,000 by 2033. While there are surveys on the number of Japanese overseas students conducted by the Japan Student Services Organization (JASSO) and the Ministry of Education, Culture, Sports, Science and Technology based on OECD data and others, these surveys only measure the number of Japanese students studying at overseas universities, graduate schools, etc., or the number of students studying abroad through domestic universities in Japan through their exchange programs. "JAOS Survey Report 2023" provides statistical data on the number of study abroad students, including adults, and junior and senior high school students. The aim is to clarify the number of Japanese study abroad students more accurately.



※ Number of Japanese Study Abroad Students by Offline Study Abroad Destination Country "JAOS Survey Report 2023"

## 2023 Study Destinations by Regions



※ Number of Japanese Study Abroad Students by Online Study Abroad Destination Country "JAOS Survey Report 2023"

| 留学国                  | online-less than 3 months | online-more than 3 months | 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        | 38                        | 0                         | 11,436                      | 962                         | 27         | 241                      | 311                  | 0                   | 129             | 1,240                             | 98  | 14,482        |
| Australia            | 401                       | 0                         | 8,690                       | 2,145                       | 48         | 68                       | 195                  | 5                   | 82              | 628                               | 360   | 12,622        |
| Canada               | 94                        | 7                         | 6,712                       | 1,713                       | 244        | 14                       | 68                   | 0                   | 4               | 658                               | 72  | 9,586         |
| United Kingdom       | 4                         | 8                         | 5,858                       | 837                         | 1          | 52                       | 26                   | 0                   | 43              | 75                                | 11  | 6,915         |
| Philippines          | 402                       | 102                       | 4,764                       | 525                         | 0          | 0                        | 0                    | 0                   | 0               | 0                                 | 503   | 6,296         |
| New Zealand          | 54                        | 0                         | 2,672                       | 359                         | 30         | 1                        | 21                   | 0                   | 1               | 1,773                             | 53  | 4,964         |
| South Korea          | 0                         | 0                         | 2,199                       | 281                         | 0          | 0                        | 0                    | 0                   | 0               | 0                                 | 6   | 2,486         |
| Singapore            | 0                         | 0                         | 1,262                       | 33                          | 0          | 0                        | 1                    | 0                   | 6               | 0                                 | 29  | 1,331         |
| Malta                | 151                       | 8                         | 970                         | 119                         | 0          | 0                        | 2                    | 0                   | 0               | 0                                 | 1   | 1,251         |
| Taiwan               | 15                        | 0                         | 912                         | 221                         | 0          | 30                       | 0                    | 6                   | 0               | 0                                 | 7   | 1,191         |
| Malaysia             | 0                         | 0                         | 694                         | 52                          | 2          | 41                       | 101                  | 0                   | 3               | 0                                 | 0   | 893           |
| Thailand             | 0                         | 0                         | 768                         | 2                           | 0          | 0                        | 0                    | 0                   | 0               | 5                                 | 81  | 856           |
| China                | 295                       | 0                         | 234                         | 151                         | 0          | 10                       | 6                    | 6                   | 1               | 0                                 | 0   | 703           |
| Vietnam              | 0                         | 0                         | 613                         | 0                           | 0          | 0                        | 0                    | 0                   | 0               | 21                                | 36  | 670           |
| France               | 7                         | 0                         | 322                         | 184                         | 54         | 0                        | 0                    | 0                   | 12              | 6                                 | 4   | 589           |
| Ireland              | 0                         | 0                         | 221                         | 160                         | 1          | 0                        | 2                    | 0                   | 0               | 9                                 | 9   | 402           |
| Indonesia            | 0                         | 0                         | 153                         | 5                           | 0          | 0                        | 0                    | 0                   | 0               | 0                                 | 104   | 262           |
| Spain                | 0                         | 0                         | 67                          | 17                          | 0          | 1                        | 0                    | 0                   | 11              | 0                                 | 0   | 96            |
| India                | 0                         | 0                         | 26                          | 4                           | 0          | 0                        | 0                    | 0                   | 0               | 0                                 | 41  | 71            |
| Germany              | 0                         | 0                         | 41                          | 29                          | 0          | 0                        | 0                    | 0                   | 0               | 0                                 | 1   | 71            |
| Cambodia             | 0                         | 0                         | 0                           | 0                           | 0          | 0                        | 0                    | 0                   | 0               | 0                                 | 63  | 63            |
| Italy                | 0                         | 0                         | 22                          | 4                           | 1          | 0                        | 0                    | 0                   | 1               | 2                                 | 0   | 30            |
| United Arab Emirates | 0                         | 0                         | 21                          | 1                           | 0          | 0                        | 0                    | 0                   | 0               | 0                                 | 1   | 23            |
| South Africa         | 0                         | 0                         | 11                          | 5                           | 0          | 0                        | 0                    | 0                   | 0               | 0                                 | 0   | 16            |
| Others               | 0                         | 0                         | 36                          | 2                           | 1          | 2                        | 3                    | 0                   | 4               | 19                                | 71  | 138           |
| <b>Total</b>         | <b>1,461</b>              | <b>125</b>                | <b>48,704</b>               | <b>7,811</b>                | <b>409</b> | <b>460</b>               | <b>736</b>           | <b>17</b>           | <b>297</b>      | <b>4,436</b>                      | <b>1,551</b>                                    | <b>66,007</b> |

### **【Summary of Survey Results】**

This study abroad student numbers for 2023 from the 40 member study abroad companies of JAOS were collected by a third-party organization. The numbers for non-member study abroad companies are not included.

#### **1. Recovery of traditional offline study abroad numbers to 83% compared to 2019. An increase of 218% compared to the previous year.**

Since the onset of the COVID-19 pandemic in 2020, the number of Japanese study abroad students decreased significantly. However, with many study destinations reopening their doors to international students in 2022, the number of Japanese study abroad students has begun to recover. According to the latest JAOS statistical survey, it was found that the number of traditional offline study abroad students in 2023 has recovered to 83% compared to 2019. This represents a 218% increase compared to the previous year. While offline study abroad is on the rise, the number of Japanese students taking online study abroad courses has decreased significantly from 4,799 in the previous year to 1,568, down from approximately 10,000 in 2020 during the COVID-19 pandemic.

#### **2. The top three destinations for Japanese study abroad students are the United States, Australia, and Canada.**

In traditional offline study abroad, the United States remains the top destination, with 14,444 students accounting for 22.4% of the total, surpassing Australia, which was second with 19% and 12,221 students. This is believed to be due to the full-scale resumption of school-organized study abroad programs in Japan in 2023. The choice of study abroad destinations for study abroad programs at Japanese high schools and universities is overwhelmingly in favor of the United States. Meanwhile, Canada, which was the top destination for Japanese students in 2022, fell to third place in 2023 with 9,485 students, accounting for 14.7% of the total. The fourth and fifth places are the United Kingdom (10.7%, 6,903 students) and the Philippines (9.0%, 5,792 students), respectively.

#### **3. Rapid increase in study abroad to Asia. Surpassing 2019 levels as the only region.**

Looking at the number of Japanese study abroad students by region - Asia, Europe, North America, and Oceania - in 2023, Asia ranks third with 14,012 students, following North America (23,929) and Oceania (17,133). However, in terms of the ratio compared to 2019, while North America is at 75%, Oceania at 72%, and Europe at 96%, Asia is at 112%, surpassing the 2019 figures. This can be attributed to factors such as the

depreciation of the yen, high cost of living, leading to a shift towards affordable study abroad options in Asia, and an increase in study abroad programs to Asia by domestic universities.

#### **4. Notable study abroad destinations include Korea, Malaysia, and Taiwan.**

In 2023, notable study abroad destinations include Korea, which has rapidly improved its relations with Japan since last year and has gained global attention through K-POP, K-dramas, and movies. Additionally, Malaysia and Taiwan, which have been known as new destinations for Japanese students to study abroad for degree programs due to the depreciation of the yen and inflation in countries like the United States and Australia, have also increased in popularity. Korea saw an increase from 1,605 Japanese study abroad students in 2019 to 2,486 in 2023. Malaysia saw a rapid increase from 481 in 2019 to 893 in 2023, while Taiwan, which was slow to recover from the COVID-19 pandemic, had almost the same number of students studying abroad as before the pandemic, with 1,191 in 2023 (a 251% increase from the previous year). It is worth noting that while most study abroad in Korea is for language learning purposes, the proportion of university degree study abroad is very high in Malaysia and Taiwan.

#### **【Future Prospects for Japanese Study Abroad Students】**

Following the decision of the Kishida Cabinet last year, the goal of the government to increase the number of Japanese students studying abroad to 500,000 by 2033 has become one of the government's key goals.

According to government documents, with the number of Japanese study abroad students at 220,000 as of 2019 before the COVID-19 pandemic, the 500K target aims to more than double the number of Japanese study abroad students in about 10 years, a highly ambitious goal for the 2033 target.

In this context, the Japan Association of Overseas Studies (JAOS) has summarized the future prospects for Japanese study abroad students as follows.

#### **1. Despite the depreciation of the yen and high cost of living overseas, Japanese study abroad students are expected to continue its growth.**

Due to historical depreciation of the yen and high cost of living in advanced countries, the cost of studying abroad has increased. However, in 2023, Japanese study abroad students increased by 218% compared to the previous year. This upward trend is expected to continue beyond 2024. The reasons for this are believed to be (1) the government's push to promote study abroad in order to achieve the 2033 500K target,

along with an increase in budgetary allocations, (2) an increase in support for study abroad costs through scholarships and support for university and high school-organized study abroad programs, (3) Due to the industry needs in future major projects such as the Osaka Expo 2025, the integrated resorts (IR) scheduled to open in 2030, and the entry of foreign hotel chains into Japan in anticipation of inbound demand, there is a high demand for highly specialized global talent, and (4) an increase in the choice of study abroad destinations to affordable options such as the Philippines, Malaysia, Taiwan, Korea, and Malta.

**2. The value of study abroad experiences will increase in the AI era, as real-world experiences become more valuable.**

The latest models of Samsung smartphones feature translation AI functions, supporting conversations with foreigners. In the future, AI will likely eliminate language barriers that have existed until now. Furthermore, information and knowledge from overseas will be easily accessible in Japanese using AI while in Japan. In this context, questions are often asked about the necessity of going abroad to study. Study abroad is not simply a means of acquiring language skills or academic knowledge. It is an experience of living in a foreign country, learning from new culture and relationships firsthand. Experiences and knowledge gained from such real-world experiences cannot be replaced by AI. Therefore, the study abroad experiences will be much more highly valued than ever before.

**3. The critical role of study abroad agencies in achieving 2033 500K target.**

The government's target of increasing the number of Japanese study abroad students to 500,000 is a very aggressive and ambitious goal, more than double the number of Japanese study abroad students before COVID-19. While various policy proposals have been included in the recommendations of the Education Future Creation Council for over 30 years, the study abroad agencies, the largest promoters of study abroad activities in Japan, have actually actively promoted study abroad on a daily basis during those 30 years. JAOS member study abroad agencies alone sent approximately 80,000 students abroad in 2019. Additionally, many study abroad agencies are involved in the planning and operation of study abroad programs at domestic universities and high schools, with expertise in crisis management and knowledge of overseas study conditions. Moving forward, the government is expected to actively involve study abroad agencies, the professionals in promoting and realizing study abroad opportunities for next generation global talent, to successfully fulfill the 2033 500K target.

## **【Summary of Survey Overview】**

Period: January to December 2023

Survey Subjects: 40 JAOS-member education agent organizations

### **■ 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 60 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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