

ASSOCIATION NAME: JAOS

COUNTRY: JAPAN

National Report for FELCA AGM – 2011

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AGENTS & Associations

What is the total number of agents operating in your country?

About 150 education and language travel agents and 300 travel agents.
The numbers are getting decreasing for last few years.

How many agencies are members of your association?

35

Market Growth/Decline

Please include information regarding trends in student numbers and student nationalities.

Although the number of outbound students has been decreasing for last few years, it has been changed and got upward trend this year. Nikkei, Japan's economic newspaper, reported in its top page that the number of Japanese students going abroad for study has come back with 30 percent up.

If information is available or if you can estimate, please provide the following, for **both** your association and all of your country:

| | <u>Association</u> | <u>Total from country</u> |
|---|--------------------|---------------------------|
| ▪ total number of language students in 2011 | 150.000 | 180,000 |
| ▪ total number of language student weeks in 2011 | N/A | N/A |
| ▪ total number of high school and university students | N/A | N/A |

▪ top 5 destinations in 2011 and % of the market of each

| | <u>Destination</u> | <u>% of your students</u> |
|---|--------------------|---------------------------|
| 1 | USA | 40 % |
| 2 | UK | 20 % |
| 3 | Canada | 20 % |
| 4 | Australia | 15 % |
| 5 | Ireland | 3 % |
| 6 | New Zealand | 1 % |
| 7 | others | 1 % |

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Above are for English speaking country bound only
Number of China bound students is as many as UK bound students.

Visa regime – any new difficulties?

No special issue

Government Relations – any developments with your or other governments?

1) Consumer Affairs Agency, Japanese Government;

In mid July,2010, one medium sized Tokyo based agency went into bankruptcy and their clients (students) were reportedly left stranded. This prompted the Japanese Government's Consumer Affairs Agency to start regulating our industry and make regulation rules by October 2011..

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The Consumer Affairs Agency, Government of Japan: In order to protect and enhance consumer benefits, the Consumer Affairs Agency was newly established on September 1st, 2009. It covers a broad range of jurisdictions related to consumer problems, such as "trade," "labeling,"and"safety."

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We reported regarding the accreditation sheme last year as below.

--- Consumer Agency contacted us, JAOS, to establish an "Accreditation" policy and they wanted to authorize us to issue a "Certification Mark". Although it is not Government certification, it will be recognized by the government. In order to accomplish the scheme, they also asked us to establish a joint planning team with government officers and staff

members. Senior staff members of the Consumer Affairs visited JAOS office and had joint meetings ----

This plan has been materialized and the accreditation body has been organized under the name; JAPAN COMMISSION FOR THE REGULATION OF OVERSEAS STUDY SERVICES: J-Cross.

Presentation seminar was held in July attended by the Government staff and about 100 agencies including 30 JAOS members attended. Application process will be conducted in October, 2011.

3) New Scholarship program for language students led by the Government = Ministry of Education. For the first time in history in our industry, the government has announced the launch of scholarship programs for 7,000 outbound language students and another 7,000 inbound language students from abroad. Scholarships have always been granted to those students who are bound for the graduate programs but this time the government plans to use the budget for the short languages programs. The budget equivalent to about 50 million USD has been allocated.

Other key issues for the industry?

N/A

Initiatives/Developments for your association?

“Global Japan Initiative” set by JAOS has been prepared to launch in December 2011 with cooperation and support by Government together with private sectors such as media and universities / high schools to dispatch 300,000 youngsters abroad.

Felca Agency Accreditation Code

Please give feedback for how many of you members' brochures/websites have now been checked.

We have been checking all members' brochures/ websites regularly – every half a year by JAOS committee for quality check.

But not concentrated on the FELCA accredited logo being used.