

Private Colleges and the Emerging New Educational Market in Japan

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Abstract

The decreasing population of high school graduates is putting pressure on many private colleges in Japan as they struggle to find enough students to fill their enrollment slots. Famous universities and colleges in major urban areas can often attract enough students, but regional institutions are left without a population base on which to survive.

The orientation of many four-year colleges towards the academic education of 18 to 22-year olds has proven to be an obstacle to continued survival. The shrinking bottom of the demographic pyramid, however, is only part of the picture. As Japan's population ages and economic conditions change, the opportunities for expansion of the traditional educational market are also increasing.

This paper will explain the situation among Japanese colleges and define how a "new educational market" might supplement traditional sources of enrollment.

Problem One: The Population

The main problem for colleges and universities relative to changes in future enrollments is the declining population of high school-aged people who might want to enter college. Over the past 20 years, nationwide birth rates have steadily declined. In 1981, the birth rate was 13 per 1000 population, while in 1998 it has fallen to 9.6 per 1000 population. (MHLW 1). This has resulted in a steady decline in additions to the population from 809,193 in 1981 to a mere 228,894 in the year 2000 — nearly a 72% drop (MHLW 2). While students born in the early '80s are now entering the college market, the future for the next 20 years looks very grim indeed for those businesses which wish to survive on the market of people in this age group. These businesses include colleges and universities with a traditional enrollment recruiting program.

The number of children 14 years old or younger, accounted for 24% of the population in the early '80s but has now declined to just 16% of the population. (MHLW 3; paragraph 2) At the same time, population aging in Japan is moving at a rate unprecedented in any other nation. As recently as 30 years ago in the early 1970s, the population aged 65 and older was hovering at around 7%. This jumped to about 15% in 1995, effectively doubling in about 25 years. Comparably, to reach this level of aging required 114 years in France, 82 years in Sweden and 46 and 42 years respectively in Germany and the UK (MHLW 4, paragraph 3). Overall this trend will result in a gradual decline in the population of Japan, starting in the year 2010, barring unusual increases in immigration or an unanticipated growth in the birthrate.

Some regions are more affected than others. Shikoku, Chugoku and West Kinki (Kyoto, Osaka, Hyogo) have been experiencing total population decline since 1995 and are projected to be the worst hit by 2020. Outside of East Kinki (Shiga, Nara, Wakayama), every area of Japan will be in decline with the greatest toll in Hokkaido, Tohoku, North Kanto (Ibaraki, Tochigi, Gunma) and the areas mentioned above. These statistics do not paint the complete picture as the population is not only in decline overall, but there has been a steady trend of population movement from rural to urban areas. 76.2% of the population lived in urban areas in 1980 increasing to 78.1% in 1995 (NIPSSR 5).

Implications of the Population Problem

The most important implication of the overall population trends is that colleges are competing for a rapidly declining number of high school graduates, which makes reaching traditional-enrollment quotas increasingly difficult. 2-year colleges are the first to take the heat and are starting to experience closures. Some try to avoid calamity by re-inventing themselves as 4-year colleges. This increases pressure on those already existing 4-year institutions to make ends meet.

The overall trends, however, do not always reflect what is happening on the ground in different regions of the nation. Colleges that depend on supplies of local students for their enrollments will be

especially hard hit in regions which are already suffering negative population growth and which are projected to experience margins of even greater decline in the years ahead. Colleges in rural areas will continue to suffer from the loss of population to urban regions unless they can extend their reach to these areas for student recruitment.

Problem Two: Trends in Post-High School Education

The number of high school students fell to 4,165,434 in 2000 — fewer than the number in 1970 (4,231,542) (MECSST 6). What has changed since then, however, is the number of colleges, universities and junior colleges. In 1973 there were 479 junior colleges and 382 colleges and universities. In 1999, on the other hand, there were 585 two-year schools and 622 four-year institutions (MECSST 7). Simple math reveals that for four-year colleges and universities, roughly 40% more institutions are competing for portions of the same-sized population pie. For the junior colleges the figures appear not to be bleak with a growth of only 20% more schools, but while these figures may not look as bleak, the reality behind the figures is worse. In 1993 total enrollments in junior colleges peaked at 530,294 students (MECSST 8). By 2000, the numbers had slipped by almost 30% to 327,680 (MECSST 9). Following the demographic plunge, the actual number of junior colleges has declined from its highpoint in 1996 of 598 schools to a 1989 level of 585 (MECSST 8). Clearly the first casualties of the population decline are the junior colleges, as the students who in previous years could only go to junior colleges instead of four-year institutions are now finding it easier to get into the latter.

Interestingly, total enrollments in 1999 at colleges and universities were at an all-time high, following the trends for more colleges and universities to be established. Even with the increase in the number of colleges, the average number of students per 4-year college has increased over the past decade from 4142 in 1989 to 4343 in 1999 (MCSST 10).

It may look as if four-year schools can cover their student deficits by the withering of the junior college system, but that view is askew,

because the students are not going to 4-year colleges in an overall even pattern. The number of students enrolled in 4-year private schools, for example, increased from 1,978,916 in 1999 to 2,008,743 in the year 2000 — a growth of 1.5% (MCSST 10) . The number of private colleges, however, went from 457 in 1999 to 478 in 2000 — an increase of 4.4% (MECSST 7). More schools are competing for a piece of a market that is not growing to keep pace. Clearly the institutions which will be getting hurt after the junior colleges are those in the private college system. The overall statistics for private college survival do not look good when seen from the angle of recruitment for younger students. In the year 2002, 30.2% of all private colleges in the nation will be below their minimum enrollment levels. 22 institutions will not even reach 50% of their necessary enrollment figures, making them vulnerable to closure orders by the Ministry of Education (Asahi Shinbun 11).

The worst performances will be among those schools in the Chugoku and Shikoku regions — areas mentioned above as being those which are taking the brunt of overall population decline.

These basic population trends are also carrying over to the vo-tech school market (専修学校・各種学校). In 1991, there were a total of 6,679 institutions of this type with 1,241,312 students. By 1999, the number of schools had dropped to 5,926 with 984,242 students enrolled, a decline of 11.3 and 20.7% respectively (MECSST 8). The number of students is dropping faster than the number of schools, so we can expect that the decline in institutions of this type will continue to keep pace in the future. Clearly the problem facing private colleges is not an increase in the number of students wanting a vo-tech education.

Problem Three: Cost and Competition

Barring a draconian privatization policy from the government, public universities and junior colleges will continue to meet enrollments well into the future — especially as long as the bad economic situation continues. Their price advantage over private institutions is enormous. All of the national universities charge the same tuition which is ¥496,800 yen per year for day-time classes and ¥386,900 per year for

evening classes. Entrance fees add ¥277,000 for the first year for the day-time students while the evening students need only pay ¥138,000 (Yahoo! 12).

There is considerable variation among private schools as far as tuition and entry fees are concerned, but fees in excess of double those for national universities are not uncommon (See Fig.1). Private colleges or universities without national or regional name recognition cannot compete on the basis of cost since they simply have to charge more than competing national universities. Coupled with the direct competition problem is the potential issue of even greater competition should some sort of privatization scheme be implemented. Departments which are successful at national universities would be funded by the national government while those which do not do well would lose funding. Private schools have no such access to the public till no matter how well they do.

Private University	Entrance Fee (¥)	Tuition (¥)
Aomori U.	200,000	1,128,000
Tohoku Gakuin U.	270,000	910,000
Tokyo Kokusai U.	230,000	620,000
Aoyama Gakuin U.	280,000	705,000
International Christian U.	300,000	1,278,000

Fig.1

Data from <http://edu.yahoo.co.jp/>(various searches)

Implications of the Cost Problem

Urban universities, both public and private, will continue to enjoy a larger population to draw upon than those in rural areas due to slow but steady urbanization (see above), but smaller, less famous institutions may find it harder and harder to compete with their larger and better known competitors even in these areas. Famous-name, private schools can draw on their wider recruiting base — either nationally or regionally, but as the population of available young people thins, they will be taking students directly from other less well-known

schools which have been recruiting them in earlier years. This means that unless other changes take place, less well-known colleges will drop a rank in recruiting and find it necessary to dip deeper into the high school-graduate population — first drawing on students who have not usually attended university and finally, cutting expenses as they fail to meet enrollment objectives. This trend can already be seen among junior colleges as shown above.

Solution Variable: Leisure Time

Leisure time for Japanese workers is increasing in every work category. In the decade between 1990 and 2000, working hours declined by 7.2% in manufacturing and 10.2% in the service industry among those companies with more than 5 employees.

Hours of Actual Work Per Month

Year	Total	Manufacturing	Services
1990	172.0	172.0	166.0
1991	168.6	168.6	163.9
1992	165.2	165.2	161.4
1993	160.0	160.0	154.8
1994	159.2	159.2	153.6
1995	159.2	159.2	153.3
1996	159.9	159.9	153.3
1997	157.6	157.6	150.9
1998	155.9	155.9	149.4
1999	153.3	153.3	148.0
2000	154.4	154.4	149.1

Fig.2

(Source: MLHW 13)

Despite the image of Japanese as endlessly hard working, the international comparison of working hours shows that Japanese are not busier than the workers of other nations by a large margin. The worker in the United States spends more time on the job than Japanese do, and workers in the UK come very close. The number of holidays each year has also increased in the past decade, reflecting not only an increase in the number of people who take two-day weekends, but also a slow increase in the number of those who are taking longer vacations. Between 1990 and 2000, there was an increase of about 10% in the total number of holidays taken by the average Japanese worker.

Working Hours/Year (manufacturing) *	
Japan	1,942
USA	1,991
Former West Germany (1997)	1,517
France (1998)	1,672
UK	1,902
Fig.3 [* (some discrepancy in populations measured)]	

(Source: MLHW 14)

The increase of leisure time, however, has little bearing on the future of private colleges unless it can be shown that there is some avenue for them to involve themselves in the use of that leisure time. There is no shortage of data to indicate that there is a large potential here.

Year	Total holidays (includes weekends)
1990	101.8
1991	105.7
1992	108.7
1993	110.2
1994	110.9
1995	111.0
1996	112.0
1997	112.5
1998	112.4
1999	113.2
2000	112.8
Fig.4	

(Source: 厚生労働省発表15)

The study of foreign languages, for example is still popular. Among those in the 25 to 34-year old age bracket, the study of foreign language consumes the leisure time of 10.9% of the population, more than any other study interest. For those in the age group 60 to 69-years old, the study of humanities and social science occupies the time of 4.5% of the population. In addition, 5.9% of the population spends time studying art and culture, while another 4.7% is interested in current topics.

Age group	Population	Study interest %
25-34	17,195,000	foreign language 10.9
60-39	13,872,000	humanities & social science 4.5
		art & culture 5.9
		current topics 5.9

Fig.5

(Source: Survey on Time Use and Leisure Activities 16)

Only looking at the members of the older age group which were 13,872,000 people at the time of the study (1997), and assuming that all of those interested in one topic are the same as those interested in all of the other topics, we can still see that the population is large. The smallest percentage, the 4.5% who are interested in humanities and social science, translates into a population of 624,240 people. As there are 2,008,743 students currently enrolled in four-year colleges (MECSST 8), this 4.5% or 624,240 represents 31.1% of the total number currently enrolled in 4-year institutions. Another way to look at the figures comparatively is to note that new enrollments for both 4-year and junior colleges across the nation in the year 2000 were only 599,655 (MECSST 17). If we assume that the people in the older age bracket who are pursuing study as a hobby are not all interested in all of the topics, the actual numbers grow even larger. The number of younger, working people who are interested in foreign languages also is large. No fewer than 1,874,255 people in this age group are currently spending some of their leisure time studying foreign languages. (See Fig. 5 above)

For four-year private colleges, facing a decline in traditional enrollments, the data associated with leisure must look very promising indeed. First, the numbers of retired people is growing. The group 65 or older for example increased from 10.3% of the population in 1985 to 15.7% of the population in 1997 (NIPSSR 5). Of these, the group of 65 to 69-year olds constitutes a block of more than thirteen million people.

These are people generally in good health and with significant financial resources. Moreover, as the data indicates a substantial percentage of them is interested in education as a pursuit — especially in the humanities.

Not everyone is retired, but the amount of leisure time available for activities other than work is increasing across the board. Japanese generally spend a lot of time on the job, but fewer hours on average than Americans who seem to find plenty of time for leisure activities. The interest in educational opportunities does not apply only to older folks, however, as the data shows that younger people remain interested in foreign language learning. Clearly a market for educational institutions is there; it is simply a question of how to gain access to it.

Solution variable: Job Changing

Coupled with the increase in leisure time, there has been a gradual increase in the numbers of those who change jobs. Overall there has been a 13.8% increase in the number of people changing jobs in the decade between 1990 and 2000.

Persons Who Changed Jobs (1990-2000)
(thousand persons)

Year	Total	Male	Female
1990	3,168.9	1,698.9	1,470.0
1991	3,516.3	2,010.2	1,506.0
1992	3,384.4	1,923.2	1,461.2
1993	2,975.3	1,759.7	1,215.6
1994	2,829.9	1,643.1	1,186.8
1995	2,980.6	1,723.1	1,257.4
1996	3,069.8	1,869.3	1,200.5
1997	3,086.6	1,802.1	1,284.4
1998	3,246.1	1,818.0	1,428.1
1999	3,474.0	1,901.3	1,572.7
2000	3,676.4	1,981.6	1,694.8

Fig.6

(Source: Survey on Employment Trends 18)

The significance of job changing trends directly involves educational institutions who might put themselves in the role of retraining or re-educating people to make job changes directly or to

adjust to the realities of a more competitive economic situation.

In addition, unemployment has reached historical levels in Japan.

Population by Labor Force Status

Year	unemployment Rate
1985	2.6
1990	2.1
1995	3.2
1997	3.4
1998	4.1
1999	4.7
2000	4.7

Fig.7

(Source: Population by Labor Force Status 19)

People who are unemployed — especially those in older age brackets — may find it necessary to reorient themselves to their new situations through education.

Access to the New Market

The first major premise to the discussion of the new educational market is that colleges and universities are businesses. Without the fundamental understanding that private colleges are in the education business and thus must respond to the changing market, further discussion is pointless.

Traditional curricula at liberal arts colleges and universities around Japan have focused on the academic education of young people. In addition to foreign languages, courses in history, literature, linguistics and economics are common. What can be said about these is that they are designed to provide a “general education” for young people — hopefully helping them to learn how to think, to synthesize and process information. This sort of curricular focus has also spread to courses for non-conventional students.

Correspondence courses, for example, offer a unique opportunity for providing unconventional education to sectors of the market which may need it, but in fact, many of the correspondence courses offered in Japan are simply paper versions of what is happening in class on campus. A total of 20 universities and 10 junior colleges offered correspondence courses in 2000, representing only a fraction of the total

number of schools (MECSST 20)

The University of the Air (放送大学) has the most comprehensive curriculum of any distance education program in Japan and offers credits for certain courses for those who wish to receive academic credit towards a degree. Many other colleges and universities recognize these credits and accept them as credits for graduation from their institutions. While many of these courses are simply TV or radio versions of “talking head” classes taught in classrooms, some of them must be designed for the emerging education-market as indicated by their student profile data. 11.6% of those taking their courses — not necessarily for college credit — are 60 or older, while 22.5% are unemployed, including housewives (University of the Air 21). Fees are cheap with the admission fee for a credit student at ¥18,000. Tuition for these students is ¥4500 per credit (University of the Air 22). These endeavors, however, are only a beginning.

Before we can discuss the various opportunities that exist in the “new educational markets”, we need to look at what direction the Ministry of Education, Culture, Sports, Science and Technology is expecting education to take in the future. The educational needs related to life-long education as defined by the Ministry of Education, Culture, Sports, Science and Technology are the following:

(1) The need to remedy the harmful effects of Japanese society's preoccupation with academic credentials

To remedy the harmful effects of Japanese society's preoccupation with academic credentials, we need to create a social environment in which appropriate value is placed on learning achievements at all stages of life, regardless of whether they are accompanied by formal academic credentials.

(2) Increased demand for learning activities for a maturing society

The maturation of Japanese society, as evidenced by rising income levels, expanding leisure time, and the aging of the population, is reflected in increasing demand for learning activities that contribute to spiritual enrichment and enjoyment of life.

(3) The need for learning in response to social and economic change

People today must constantly acquire new knowledge and skills in order to keep pace with the issues affecting Japanese society and economy, including advances in science and technology, the increasing use of sophisticated information technology, internationalization and changes in the industrial structure. (MECSST 21)

Of course, the Ministry's efforts to address these needs cover a wide range of activities, from spending on local educational programs and the introduction of the 5-day school week (from 2002), to the encouragement of adult enrollment in colleges and universities (MECSST 21). The Ministry seems to understand the need for increased diversity in the educational system and has been trying various programs to promote it.

Compared to the relatively recent efforts being made in Japan for life-long educational opportunities, the United States has long emphasized the need for continuing education. In the US, for example, some of these educational needs have been satisfied by community colleges which have a history of 100 years. Designed to fill the gap between high school and university, these two-year colleges offer courses in a wide variety of fields. These schools operate on a very different basis than the schools in the four-year system. The faculty, for example, is heavily focused on teaching rather than research. 84.5% of public 2-year college professors state that their primary activity is teaching, while only 0.3% claim that research is their most important activity. Among faculties at public research universities, by way of comparison, 24.7% report that research is their primary activity, while less than half, 46.8%, claim that teaching is (NCES 24).

These percentage differences are reflected in the amount of time each faculty spends on the two activities. At public research universities in the US, full-time faculty spends 45.9% of its time on teaching activities and 25.9% on research. At the public 2-year college level, however, these figures change dramatically to 71.9% and 3.8% respectively (NCES 25).

Moreover, the number of classroom hours and student contact hours spent by full-time faculty reflects this difference in educational orientation. While a faculty member at a public research institution will

spend 7.8 hours in the class per week, a full-timer at a 2-year public school will spend 17.2 hours in the classroom per week. Contact hours calculated on the number of credit classes multiplied by the number of students shows an even more marked difference in that faculty at public research institutions have 321 contact hours per week while public 2-year school faculty have 425 contact hours per week. (NCES 26)

Given that standard faculty teaching loads at Japanese universities come to about 9 hours of class per week, one can conclude that most Japanese university professors have similar ratios of teaching and research to those full-time faculty members at public research institutions in the US. This is one of the key points that will have to change at private colleges in Japan to open up opportunities in the new educational market. There is no compelling need for the bulk of Japanese private college and university faculties to spend as much time on research as is spent by faculties in research universities in the US. One tactic that private colleges in Japan can employ in trying to get into the new educational market is to reorient their faculties away from research and into teaching.

Reducing the number of hours faculty spends on research will free up time for educational planning and teaching. Older generation "scholars" in the Japanese university tradition may balk at having their positions redefined in this way, but since survival is on the line in many cases, recalcitrant faculty will have to be pushed and prodded to go along, or simply let go. A major part of "faculty development" should make use of student evaluations that are routinely taken at many colleges and universities around Japan. The data from these evaluations should be used in promoting faculty, in assigning faculty more or different classes and in salary decisions for teachers.

Private colleges are not the only ones who are interested in these issues. Clearly the Ministry of Education is aware of and studying the problems associated with the variations in teaching versus research work loads. The minutes of the 107th session of the 大学審議会 (University Study Group) 大学教育部会 (University Education Section Group) show that the issue of California's three-tier educational system which includes a commitment to community college education are of

interest to those contemplating change in Japan's post-secondary educational system (27).

While private colleges in Japan cannot imitate the community college system in the US precisely on account of higher costs and lack of access to public funds, there are many features of the system that can be applied to the new market in Japan.

One of these is the community college two-track course system. Credit classes are offered to students who wish a degree from the two-year institution or who hope to transfer the credits to a four-year school when they graduate. These follow the more typical form of academic or workforce preparation. In addition to these classes, however, are non-credit classes which are offered as "enrichment education". It is offering this type of course that may open up the new market for private colleges in Japan. Review of any community college's course offerings will show that many such "enrichment courses" are offered. To cite one example, North Seattle Community College's Fall 1999 Continuing Education Non-credit courses catalog includes no fewer than 206 different classes. Many of these, such as classes in ceramics or photography are the types of classes offered at local community centers in Japan, but some are of the type that a private college is best equipped to present. Courses on internet or other computer-based uses, for example, require facilities that are most easily available in a college setting. Media skills training, how to make presentations or give an interview, could be part of regular curricula and could also be offered on a non-credit basis. Travel classes involving a series of small classes with a professor who is knowledgeable about an area —foreign or domestic — could then culminate in a tour of the areas that came under study. And, of course, foreign languages can be offered on this basis as well.

Solution: Analyze the Market and Assess Capabilities

It is not adequate, however, to sit back and fantasize about what sort of non-credit or enrichment classes might have sales appeal in the new educational market. The development of these programs must be based on a comprehensive analysis of what the community needs. This

can be achieved by employing a locally modified version of the Community-Based Programming tool which has been used effectively by rural community colleges in the US to assess their ability to address the educational needs of their communities and to respond to those needs effectively (Boone, 28). The C-BP tool can be modified to fit the private college situation as follows:

1. The college must carefully examine its mission, goals, and organizational structure to determine if it is prepared, both philosophically and practically, to assume educational roles in the community. Insofar as possible, an early attempt should be made to outline what those roles might be and what the limitations on the roles will be in terms of staff, time, facilities and cost.

Reorienting the faculty time from research to educational activities should create opportunities for expansion of existing programs and development of new ones. Careful analysis of how many staff and faculty hours can be devoted to these new activities must be a part of this planning process. Money is never unlimited, so it will be necessary to evaluate how much in the way of financial resources can be devoted to new activities and also what sort of return might be anticipated or necessary.

2. The college must increase its awareness of the social, cultural, economic, and political environments of the community by setting up faculty and staff taskforces to research each of these areas and develop proposals for how educational issues can be addressed by the institution. Populations which would be affected by the educational proposals should be precisely identified.

There is no substitute for market research. The task forces appointed to perform these studies should undertake to define with as much precision as possible what the needs of the community are in terms of education. Offering a lecture series, for example, may be a fine idea, but it should be done against the background of solid understanding of what the community's educational needs are. What specific population is targeted by the lecture series? What does the college and the community expect to achieve by the lecture series?

3. Each task force should make an effort to have its proposals reviewed

by important members of the precise community which would be affected by the educational proposals. These members should, along with the task force, prioritize the proposals.

Rather than contemplating new projects in the comfortable isolation of the college campus, every task force should have as a part of its main goals the specific objective of identifying and incorporating community representatives from the portion of the population that the task force is analyzing. As proposals are created to address the educational needs of the community, these leaders should be involved at every step — especially at the final stage of prioritization.

4. The college, along with community leaders, should take each task force proposal, prioritize them and undertake to implement those which fall within the limitations outlined in 1 above.

The college president and others in positions of leadership need to take the final step to match the task forces' proposals with the limitations assessed in 1 above and prioritize them according to broader institutional goals. If making money is the primary goal, this will shape the prioritization list. If public relations is the main purpose, this will result in a different prioritization. Again, community leaders whose roles traverse different sections of society should be brought in to help with this prioritization process.

Conclusion

The rapid decline in the population of high school graduates coupled with the large number of colleges and universities around Japan forces changes in the way private colleges do business. These changes include recruitment re-orientation, curriculum reform, staff/faculty development and leadership from the top.

The supply of 18-year-olds grows smaller each year making traditional recruitment efforts like investing in the Betamax — there is little future for growth there. Instead private colleges should be looking to develop new educational markets among older people at first and then in carefully targeted sectors of the work force, addressing their needs as assessed by a comprehensive market-research policy. Increased leisure time, a disposition to take courses and a rapidly

changing job scene all contribute to opportunities for development of a new education market.

Curriculum reform must follow the needs of the market. The academic education of high school grads will continue to be an important part of what colleges do; however, it cannot be the only thing. Courses must be designed to fit the needs of an older, more goal-directed population whose help should be enlisted in developing new curricula. At every level, colleges will need to make strong efforts in developing courses that are meaningful to those who take them.

Staff and faculty at private colleges — long accustomed to a cloistered existence — will have to make a difficult adjustment. Colleges trying to operate successfully as a business will need staff members who can convey the new perspective to educational “customers”. Faculty will have to make the biggest adjustment. The days of “doing what you like” in the academic ivory tower will necessarily give way to a more engaged and teaching-centered educational environment. Professors will need to spend more time in the classroom and in contact with their educational “clients” and less time pouring over books in their studies.

The most difficult aspect of implementing these necessary changes to quantify is the aspect of leadership. The traditional way of doing things in colleges is well-entrenched and changes in recruitment, curricula and staff/faculty re-orientation will be challenged by those who have a vested interest in the existing system. Strong leadership coming from the top of private institutions will be essential in seeing these schools through this difficult period.

The changes in the Japanese educational market have been looming on the horizon for years. Private colleges who take the initiative to “re-invent” themselves may still find that there is potential not only for survival but even expansion.

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