Benesse Educational Research & Development Institute

The 4th Basic Survey on Early Childhood Education and Care in Japan

Summary Version

Social conditions are constantly changing, characterized by declining birth rates and an increase in dual-income households with infants and young children.

Since the last survey conducted in 2018, the environment surrounding childcare facilities has evolved significantly. Key developments include the introduction of free early childhood education and care, the promotion of the Early Childhood to School Transition Program, the establishment of the Children and Families Agency, and the enforcement of the Basic Act on Children.

To better understand these changes, we collaborated with principals and ECEC teachers at kindergartens, daycare centers, and certified ECEC centers and investigated the conditions and issues within childcare facilities.

This report presents survey data that provides insights into the current state of early childhood education and care, following the 2017 revisions to the "National Curriculum Standard for Kindergartens," the "Guidelines for Nursery Care and Education at Day Nurseries," and the "Guidelines for Education and Childcare at ECEC Centers" (collectively referred to as the "National Curriculum Standard/Guidelines").
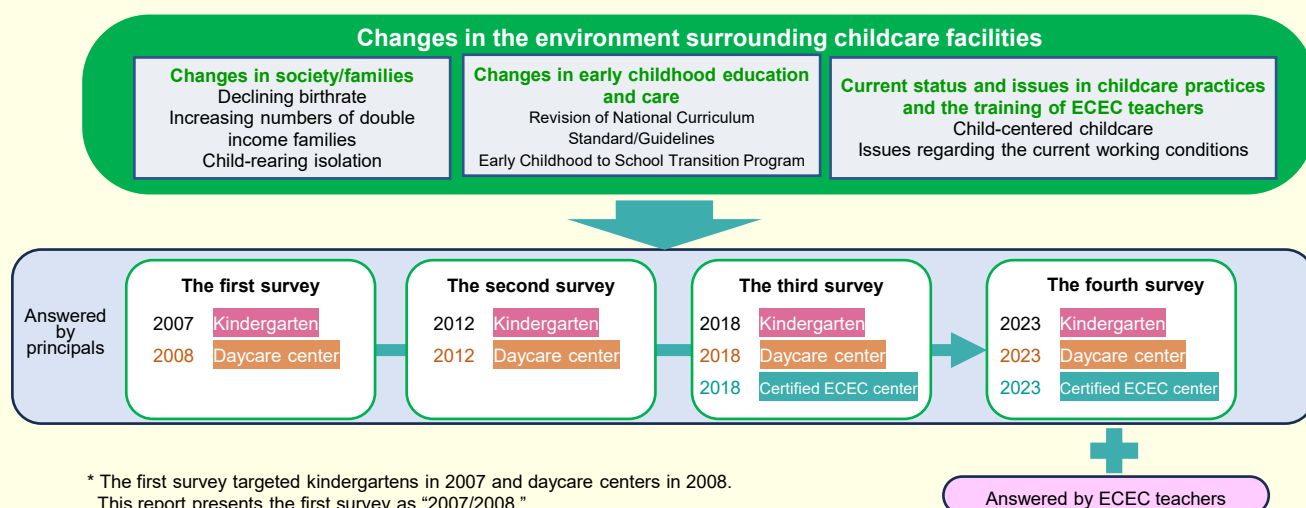
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About the survey

Background and purpose

As the number of dual-income households with infants and young children rises and isolated child-rearing becomes more prevalent, the role of childcare facilities as an environment for early childhood development is becoming increasingly significant. Early childhood education and care structures are also evolving in response to social changes. In 2017, the "National Curriculum Standard/Guidelines" were revised to emphasize the importance of fostering "attitudes of learning to learn, humanity, and similar qualities," as well as "integrated instructions through play" from infancy and early childhood. Furthermore, initiatives are being undertaken through the Early Childhood to School Transition Program to create a seamless connection between early childhood education and elementary schools. It is important to understand how these developments in early childhood education and care have affected practices in childcare facilities.

This survey includes two components -one for principals and another for ECEC teachers. The survey for principals serves as a framework to understand the current situation and issues within various types of childcare facilities nationwide, allowing comparisons with past data. In this fourth survey (2023), we also included ECEC teachers from kindergartens, daycare centers, and certified ECEC centers. By gathering these voices who interact directly with children and parents, we aimed to capture the current situation and issues of childcare practices and the training of ECEC teachers. In this report, we clarify the state of early childhood education and childcare efforts in kindergartens, daycare centers, and certified ECEC centers, particularly in light of changes in social and family environments following the revision of the National Curriculum Standard/Guidelines. Furthermore, we reflect on the challenges faced today.
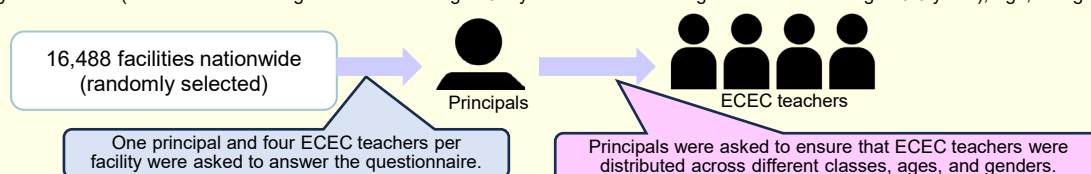
Changes in the environment surrounding childcare facilities

Changes in society/families
Declining birthrate
Increasing numbers of double income families
Child-rearing isolation

Changes in early childhood education and care
Revision of National Curriculum Standard/Guidelines
Early Childhood to School Transition Program

Current status and issues in childcare practices and the training of ECEC teachers
Child-centered childcare
Issues regarding the current working conditions

Answered by principals

The first survey	The second survey	The third survey	The fourth survey
2007 Kindergarten	2012 Kindergarten	2018 Kindergarten	2023 Kindergarten
2008 Daycare center	2012 Daycare center	2018 Daycare center	2023 Daycare center
		2018 Certified ECEC center	2023 Certified ECEC center

* The first survey targeted kindergartens in 2007 and daycare centers in 2008.
  This report presents the first survey as "2007/2008."

Answered by ECEC teachers

Outline of the survey

● **Themes:** Environment/structure of childcare facilities, current status of educational/childcare activities, awareness of facility principals and ECEC teachers
● **Sampling method:**
Sampling of childcare facilities: Samples were randomly selected from a national list of childcare facilities in each prefecture (national/public/ private kindergartens, public/private certified daycare centers, and public/certified private ECEC centers). Facilities with 29 or fewer children and those without children aged 3 to 5 years were excluded from this selection.
Sampling of ECEC teachers: We asked the principals of the selected facilities to choose and distribute a questionnaire survey to four ECEC teachers, considering their classes (two teachers in charge of infant class aged 0-2 years and two in charge of toddler class aged 3-5 years), age, and gender.

16,488 facilities nationwide
(randomly selected)

Principals

ECEC teachers

One principal and four ECEC teachers per facility were asked to answer the questionnaire.

Principals were asked to ensure that ECEC teachers were distributed across different classes, ages, and genders.

● **Survey methods**
Request by mail: Requests were sent asking to complete the questionnaire by the principal and four ECEC teachers per facility.
Online answers: Participating principals and ECEC teachers answered the questionnaire by accessing the website.
● **Subjects:** Principals[1] and ECEC teachers from national/public/private kindergartens, public/private certified daycare centers, and public/private certified ECEC centers nationwide.
  *1 Including principals, directors, facility chiefs, vice principals, vice directors, vice facility chiefs, and supervisors.
● **Survey period:** November to December 2023
● **Survey items:** Environment and facilities, education and childcare goals, education and childcare activities, ECEC teacher training, circumstances of children with disabilities, cooperation/collaboration with elementary schools, circumstances and efforts of childcare facilities, challenges in childcare practices and management of childcare facilities.

  The survey items were designed for time comparison, with modifications such as additions and deletions made to adapt to contemporary changes.

About the survey

Number of valid Answers by principals and ECEC teachers (2023)

The fourth survey (2023)	Principals		ECEC teachers	
	Number of questionnaires sent	Number of valid responses	Maximum number of questionnaires distributed	Number of valid responses
National/public kindergarten	1,433	449	5,732	1,011
Private kindergarten	2,592	401	10,368	1,411
Public daycare center	4,354	874	17,416	3,021
Private daycare center	4,556	919	18,224	4,221
Public certified ECEC center	821	279	3,284	1,044
Private certified ECEC center	2,732	916	10,928	4,255
Total	16,488	3,838	65,952	14,963

Number of valid Answers by principals (chronological comparison)

	The first survey	The second survey	The third survey	The fourth survey
	2007 (survey on kindergartens) 2008 (survey on daycare centers)	2012	2018	2023
National/public kindergarten	401	456	606	449
Private kindergarten	1,203	921	888	401
Subtotal	**1,604**	**1,377**	**1,494**	**850**
Public daycare center	1,540	1,362	840	874
Private daycare center	1,478	2,343	1,481	919
Subtotal	**3,018**	**3,705**	**2,321**	**1,793**
Public certified ECEC center	-	-	201	279
Private certified ECEC center	-	-	830	916
Subtotal	**-**	**-**	**1,031**	**1,195**
Total number of valid responses	4,622	5,082	4,846	3,838

Data bias and analytical framework

- Data bias in facility types and locations:
  When compared to the "School Basic Survey" conducted by the Ministry of Education, Culture, Sports, Science and Technology and the "Survey on Social Welfare Facilities, etc." by the Ministry of Health, Labor and Welfare, there is little bias and the overall data collected is generally well-balanced.
- Chronological comparison:
  ① Responses categorized as "Other" regarding the type of childcare facilities (national, public, private, and publicly or privately operated) were included in the overall analysis of three facility types --kindergarten, daycare center, and certified ECEC center. However, these "Other" responses were excluded from the analysis of each facility type.
  ② In the 2018 preliminary report, the analysis focused exclusively on the "kindergarten-daycare integrated type" for certified ECEC centers. However, this report includes additional types of certified ECEC centers other than the "kindergarten-daycare integrated type." Hence, the findings from this report differ from those presented in the 2018 preliminary report.

Notes concerning the data

- In this report, the survey years are presented using abbreviations; for example, the third survey (2018) is abbreviated as "2018" and the fourth survey (2023) as "2023."
- Answered by principals represent the questions directed to principals, while Answered by ECEC teachers represent the questions directed to ECEC teachers.
- For childcare facility types, publicly established and publicly operated facilities are categorized as "public," while publicly established but privately operated facilities as well as privately established and privately operated facilities are categorized as "private."
- The percentages (%) in this report are calculated according to the method for each item, and are displayed as numbers rounded to two decimal places. Hence, the total may not add up to 100.

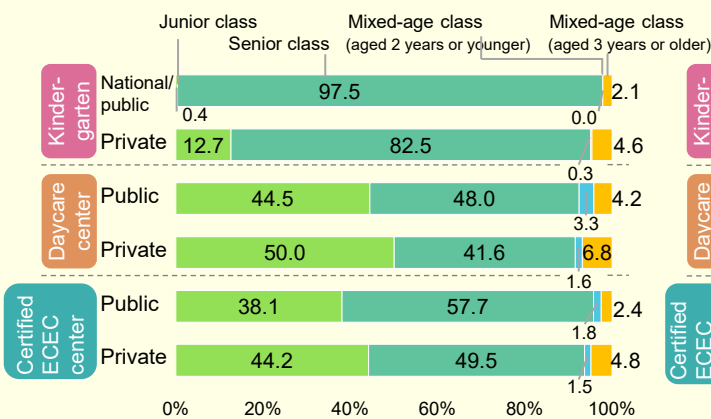# Basic attributes

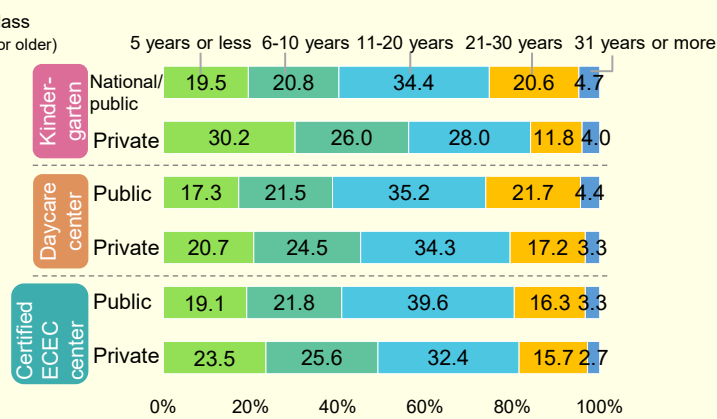## Position of respondents (2023) — Answered by principals

	Principal/director/facility chief	Vice principal/vice director/vice facility chief	Supervisor	Other
Kindergarten — National/public	88.0	9.1	2.9	0.0
Kindergarten — Private	79.1	13.2	6.0	1.7
Daycare center — Public	95.7	2.3	1.9	0.1
Daycare center — Private	86.2	3.9	9.2	0.7
Certified ECEC center — Public	92.8	5.0	2.2	0.0
Certified ECEC center — Private	79.8	12.1	7.8	0.3

Class in charge (2023) — Answered by ECEC teachers

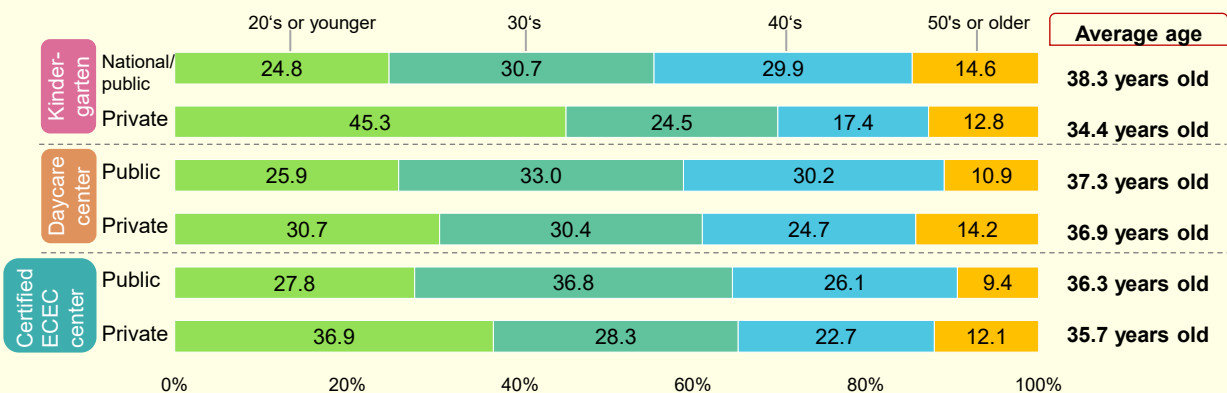|	Junior class	Senior class	Mixed-age class (aged 2 years or younger)	Mixed-age class (aged 3 years or older)
Kindergarten — National/public	0.4	97.5	0.0	2.1
Kindergarten — Private	12.7	82.5	0.3	4.6
Daycare center — Public	44.5	48.0	3.3	4.2
Daycare center — Private	50.0	41.6	1.6	6.8
Certified ECEC center — Public	38.1	57.7	1.8	2.4
Certified ECEC center — Private	44.2	49.5	1.5	4.8

※ "Junior class" refers to the combined percentage of teachers in charge of the 0-2-year-old class, while "Senior class" refers to the combined percentage of teachers in charge of the 3-5-year-old class.
※ A kindergarten's "Junior class" refers to a kindergarten that accepts 2-year-olds.

Years of experience (2023) — Answered by ECEC teachers

	5 years or less	6-10 years	11-20 years	21-30 years	31 years or more
Kindergarten — National/public	19.5	20.8	34.4	20.6	4.7
Kindergarten — Private	30.2	26.0	28.0	11.8	4.0
Daycare center — Public	17.3	21.5	35.2	21.7	4.4
Daycare center — Private	20.7	24.5	34.3	17.2	3.3
Certified ECEC center — Public	19.1	21.8	39.6	16.3	3.3
Certified ECEC center — Private	23.5	25.6	32.4	15.7	2.7

Age groups of ECEC teachers (2023) — Answered by ECEC teachers

	20's or younger	30's	40's	50's or older	Average age
Kindergarten — National/public	24.8	30.7	29.9	14.6	38.3 years old
Kindergarten — Private	45.3	24.5	17.4	12.8	34.4 years old
Daycare center — Public	25.9	33.0	30.2	10.9	37.3 years old
Daycare center — Private	30.7	30.4	24.7	14.2	36.9 years old
Certified ECEC center — Public	27.8	36.8	26.1	9.4	36.3 years old
Certified ECEC center — Private	36.9	28.3	22.7	12.1	35.7 years old

1-1 Open hours of childcare facilities

The open hours of kindergartens are longer than they were in 2018.

In 2023, the open hours for childcare facilities were as follows: National and public kindergartens in the 8-hour range; private kindergartens in the 9-hour range; public daycare centers in the 11-hour range; private daycare centers in the 12-hour range; public certified ECEC centers in the 11-hour range; private certified ECEC centers in the 11-hour range. Private facilities generally offer longer open hours than their public counterparts (Figure 1-1-1). A chronological comparison of kindergarten open hours highlighted that the hours had increased by 20-30 minutes. For private kindergartens, a growing proportion of facilities started between 7:30 a.m. and 7:59 a.m. In contrast, the percentage of facilities opening from 9:00 a.m. onwards declined (Figure 1-1-2). For national and public kindergartens, the number of facilities closing between 2:00 p.m. and 3:59 p.m. decreased while facilities closing after 4:00 p.m. increased (Figure 1-1-3). One possible explanation could be the increase in extended childcare services at national and public kindergartens (Figure 1-1-4).

Figure 1-1-1 Duration of open hours (chronological comparison per facility type) [Average hours]   Answered by principals

	Kindergarten		Daycare center		Certified ECEC center	
	National/public	Private	Public	Private	Public	Private
2018	7 hrs 29 mins	9 hrs 29 mins	11 hrs 25 mins	12 hrs 02 mins	11 hrs 24 mins	11 hrs 50 mins
2023	8 hrs 04 mins	9 hrs 51 mins	11 hrs 30 mins	12 hrs 03 mins	11 hrs 23 mins	11 hrs 51 mins

* The figures for certified ECEC centers represent the data for the kindergarten-daycare integrated type.
† The duration of open hours was calculated using each facility's earliest opening time and the last closing time (including extended/extra childcare services).
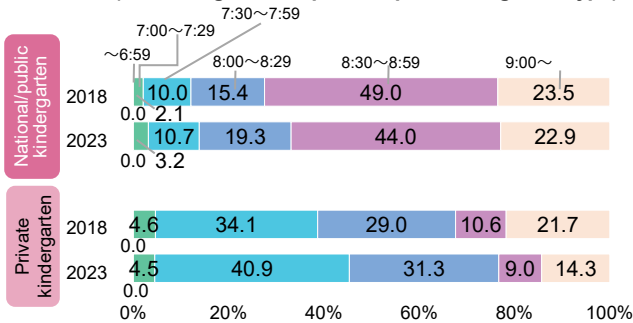‡ Computing does not include "no responses" and "unknown responses."
** Average duration of open hours was calculated per childcare facility type.

Figure 1-1-2 Opening time   Answered by principals
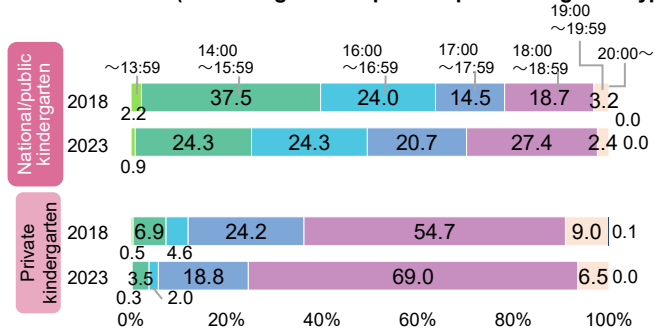(chronological comparison per kindergarten type)

* The opening time was calculated using each facility's earliest opening time (either the opening time for standard childcare or the opening time for extended/extra childcare before the start of standard childcare).
† "No responses" and "unknown responses" were excluded from the calculation.

Figure 1-1-3 Closing time   Answered by principals
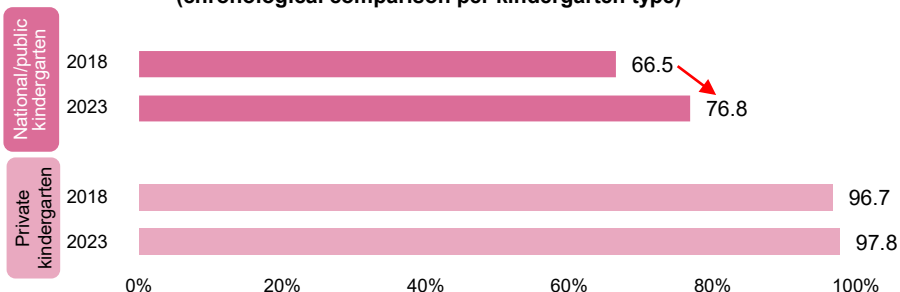(chronological comparison per kindergarten type)

* The closing time was calculated using each facility's last closing time (either the closing time for standard childcare or the closing time for extended/extra childcare after standard childcare).
† No responses" and "unknown responses" were excluded from the calculation.

Q **Does your facility offer extended childcare services?**

Figure 1-1-4 Percentage of facilities providing extended childcare services   Answered by principals
(chronological comparison per kindergarten type)

* Percentage of responses indicating "Yes, we do."
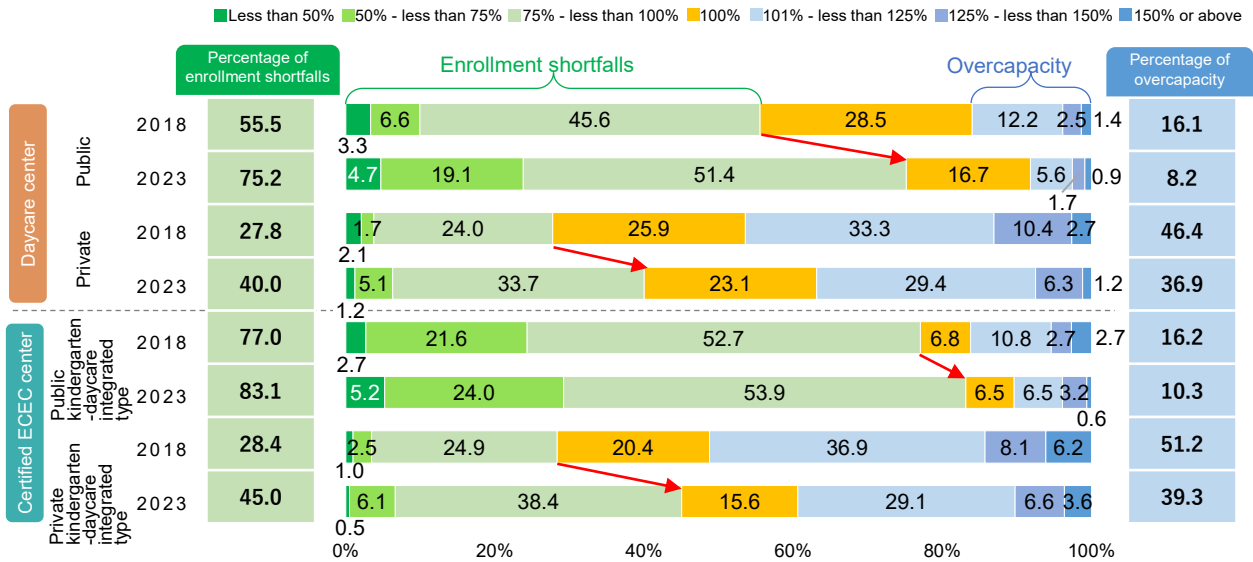
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1-2 Capacity fill rate (0- to 2 year-olds)

Since 2018, there has been an increase in enrollment shortfalls at all types of child facilities.

Enrollment shortfalls for classes catering to children aged 0-2 years increased at publicly operated daycare centers and certified ECEC centers. Compared to 2018, the percentage of public daycare centers facing enrollment shortfalls increased by approximately 20 points, reaching 75.2%. Similarly, the percentage of certified public ECEC centers (kindergarten-daycare integrated type) facing enrollment shortfalls increased by about 6 points to 83.1%. For privately operated childcare facilities, about 40% of private daycare centers and certified ECEC centers (kindergarten-daycare integrated type) experienced enrollment shortfalls (Figure 1-2-1). When analyzing the data based on population size, a higher percentage of public daycare centers facing enrollment shortfalls were located in areas with smaller populations (Figure 1-2-2).

Q Please write the capacity and actual numbers of children for each classroom at your facility as of November 1, 2023. If there is no applicable child, write "0."

Figure 1-2-1 Capacity fill rate for 0-2-year-old classes
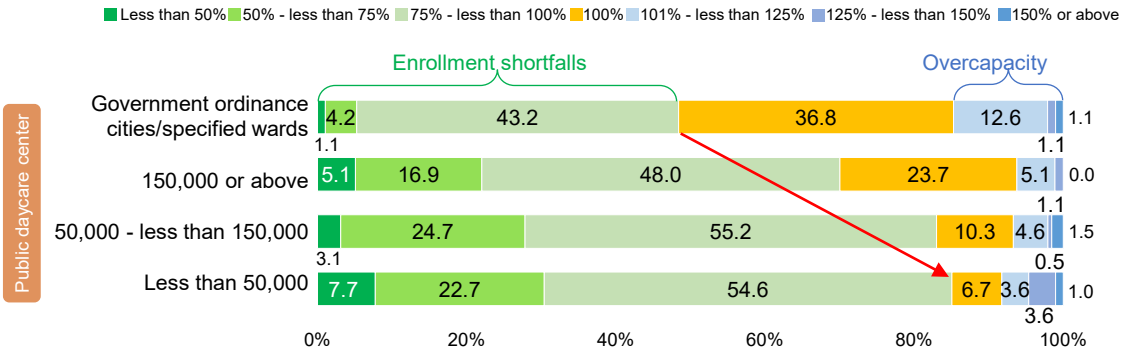(chronological comparison for daycare centers/certified ECEC centers)

Answered by principals

* The figures for certified ECEC centers represent the analysis results of kindergarten-daycare integrated type ECEC centers.
† Only the cases of written capacity and actual numbers in each age group were analyzed.
‡ The capacity fill rate was calculated by dividing the total number of children attending classes in each age group by the capacity.
** Capacity 0 cases were excluded.

Figure 1-2-2 Capacity fill rate for 0-2-year-old classes
(comparison by population size for public daycare centers in 2023)

Answered by principals

* The population size for each municipality where a childcare facility was located was classified according to the "2023 Population Estimates" published by the Statistics Bureau of the Ministry of Internal Affairs and Communications.
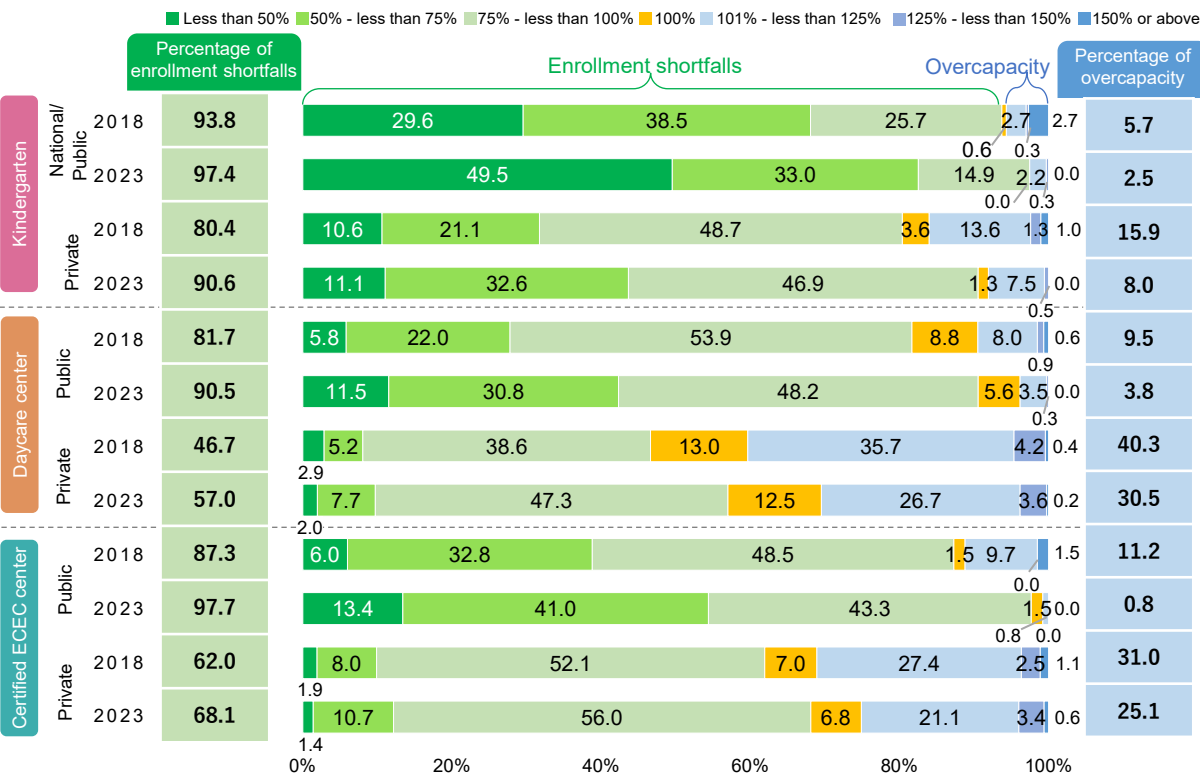
1-3 Capacity fill rate (3- to 5-year-olds)

For classes catering to children aged 3-5 years, 90% of national/public childcare facilities faced enrollment shortfalls.

Our chronological analysis indicated a growing trend of enrollment shortfalls in childcare facilities. In 2023, 97.4% of national and public kindergartens, 90.5% of public daycare centers, and 97.7% of public certified ECEC centers experienced enrollment shortfalls. Additionally, among privately operated facilities, 57.0% of private daycare centers and 68.1% of private certified ECEC centers reported enrollment shortfalls. However, 30.5% of private daycare centers and 25.1% of private certified ECEC centers are operating above their capacity (Figure 1-3-1). In particular, when analyzing the data by population size, in areas with a population of "Less than 50,000," 46.0% of kindergartens reported "Less than 50% capacity fulfillment rate" (Figure 1-3-2).

Q **Please write the capacity and actual number of children for each classroom at your facility as of November 1, 2023. If there is no applicable child, write "0."**

Figure 1-3-1 Capacity fill rate for 3-5-year-old classes (chronological comparison per facility type) — Answered by principals

* The figures for certified ECEC centers represent the analysis results of all cases for "kindergarten type," "daycare center type," and "kindergarten-daycare integrated type."
† Only the cases of written capacity and actual numbers in each age group were analyzed.
‡ The capacity fill rate was calculated by dividing the total number of children attending classes of each age group by the capacity.
** Cases with a capacity of 0 were excluded.

Figure 1-3-2 Capacity fill rate for 3-5-year-old classes (comparison by population size for kindergarten in 2023) — Answered by principals

* The population size for each municipality where a childcare facility was located was classified according to the "2023 Population Estimates" published by the Statistics Bureau of the Ministry of Internal Affairs and Communications.

1-4 Circumstances of children with disabilities

The percentage of facilities accommodating children with disabilities has risen to 80-90% over the years.
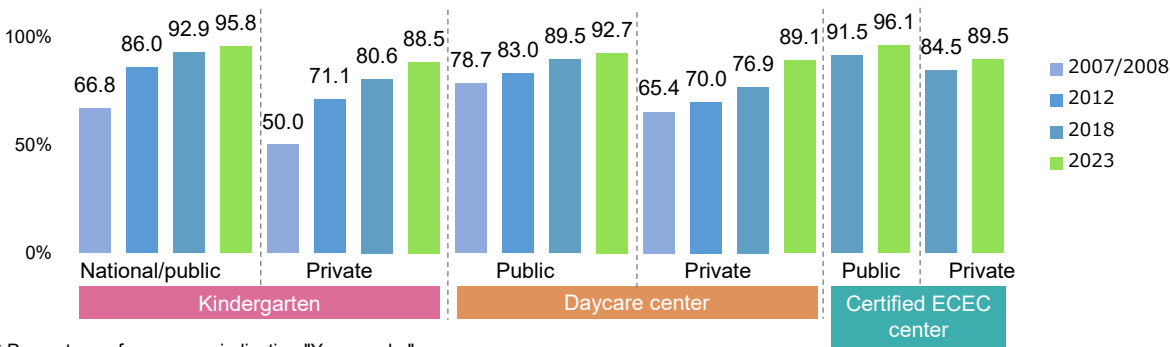
Since the 2007/2008 survey, the number of facilities accommodating children with disabilities has increased across all facility types. Additionally, the enrollment of these children in private kindergartens, private daycare centers, and private certified ECEC centers has gradually increased. By 2023, nearly 90% of private facilities accepted children with disabilities (Figure 1-4-1). Furthermore, in terms of circumstances and changes at childcare facilities over the years, 90% of facilities reported that the number of children who are difficult to manage and require careful interaction had "increased" (Figure 1-4-2). Similarly, about 50% of principals at kindergartens and more than 30% of principals at daycare centers and certified ECEC centers reported that they felt the number of children with foreign roots had "increased" (Figure 1-4-3).

Q **Does your facility have children with disabilities?**

Figure 1-4-1 Childcare facilities accommodating children with disabilities (chronological comparison per facility type)

Answered by principals

* Percentage of responses indicating "Yes, we do."

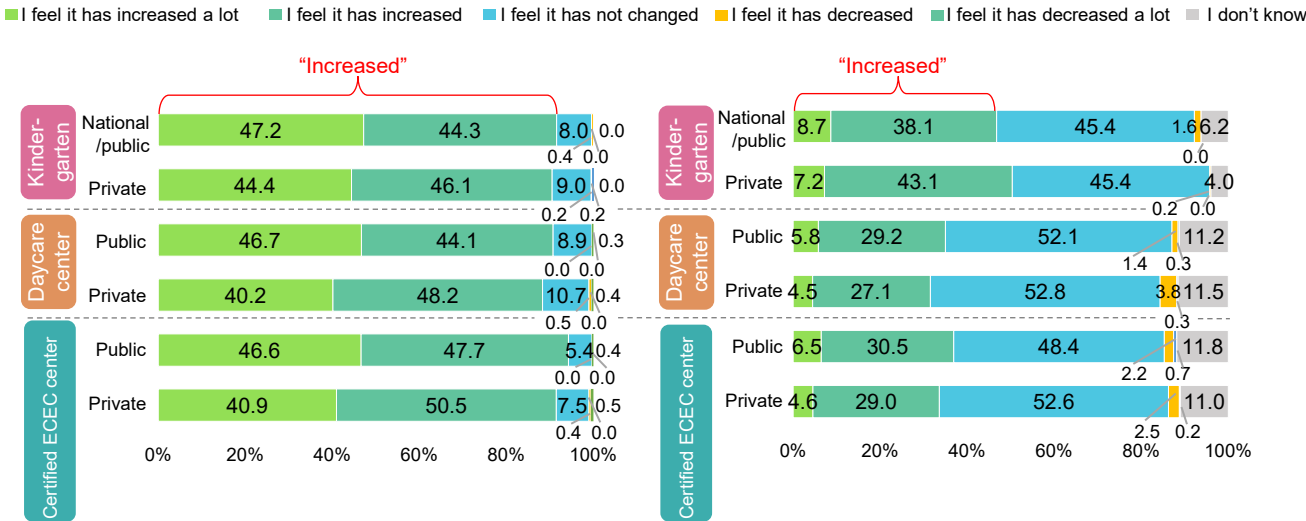**Q** **Please tell us what you think about the circumstances and changes at your facility over the past few years (2019-2023). Please select one that applies to you for each item.**

Figure 1-4-2 Children who are difficult to manage and require careful interaction (per facility type; 2023)

Answered by principals

Figure 1-4-3 Children with foreign roots (per facility type; 2023)

Answered by principals
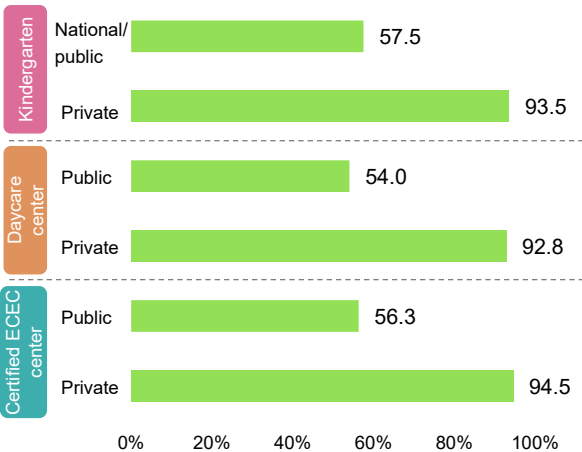

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1-5 ICT environment at childcare facilities

50% of national/public childcare facilities and 90% of private childcare facilities utilize wireless internet (Wi-Fi). ECEC teachers' use of smartphones and tablets for work has increased compared to five years ago.

While more than 90% of private childcare facilities utilized Wi-Fi, about 50% of national/public childcare facilities used Wi-Fi (Figure 1-5-1). Since 2018, the use of electronic systems to manage children's arrival and dismissal, attendance, bus use, etc. increased in all facility types (Figure 1-5-2). The use of smartphones and tablets by ECEC teachers for work increased compared to 2018, with 50% of teachers at national/public childcare facilities and 60-70% of teachers at private childcare facilities now using these devices (Figure 1-5-3). The use of tablets among preschool children slightly increased compared to 2018. According to the survey results, about 7% of children at national/public/private childcare facilities and 10.9% of children at private certified ECEC centers use these devices (Figure 1-5-4).
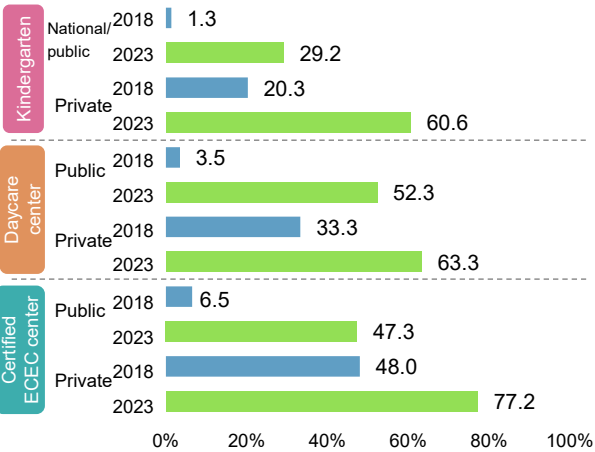
Q Does your facility utilize the following environment and equipment?

Figure 1-5-1 Use of wireless internet (Wi-Fi) (per facility type, 2023) — Answered by principals

Kindergarten
- National/public: 57.5
- Private: 93.5

Daycare center
- Public: 54.0
- Private: 92.8

Certified ECEC center
- Public: 56.3
- Private: 94.5

* Percentage of responses indicating "Yes, we do."
† Question items used since 2023.

Figure 1-5-2 Use of electronic systems to manage children's arrival and dismissal, attendance, bus use, etc. (chronological comparison per facility type) — Answered by principals

Kindergarten
- National/public 2018: 1.3
- National/public 2023: 29.2
- Private 2018: 20.3
- Private 2023: 60.6

Daycare center
- Public 2018: 3.5
- Public 2023: 52.3
- Private 2018: 33.3
- Private 2023: 63.3

Certified ECEC center
- Public 2018: 6.5
- Public 2023: 47.3
- Private 2018: 48.0
- Private 2023: 77.2

* Percentage of responses indicating "Yes, we do."

Figure 1-5-3 Use of smartphones and tablets by ECEC teachers for work (chronological comparison per facility type) — Answered by principals

Kindergarten
- National/public 2018: 4.7
- National/public 2023: 52.3
- Private 2018: 26.5
- Private 2023: 69.6

Daycare center
- Public 2018: 5.7
- Public 2023: 56.8
- Private 2018: 33.4
- Private 2023: 68.8

Certified ECEC center
- Public 2018: 13.2
- Public 2023: 54.5
- Private 2018: 38.1
- Private 2023: 72.6

* Percentage of responses indicating "Yes, they do."
† The data on "Use of smartphones and tablets by ECEC teachers" included responses from those using only tablets, only smartphones, and both devices.

Figure 1-5-4 Use of tablets among preschool children (chronological comparison per facility type) — Answered by principals

Kindergarten
- National/public 2018: 0.7
- National/public 2023: 7.3
- Private 2018: 2.4
- Private 2023: 7.5

Daycare center
- Public 2018: 0.1
- Public 2023: 1.8
- Private 2018: 1.4
- Private 2023: 4.2

Certified ECEC center
- Public 2018: 0
- Public 2023: 5.0
- Private 2018: 4.3
- Private 2023: 10.9

* Percentage of responses indicating "Yes, they use."

1-6 Communication methods with parents

Compared to 2018, more respondents chose "Exchanges at entering/leaving time" and "Individual parent-teacher conferences." Conversely, fewer respondents chose "Classroom conferences," "Parent-teacher meetings," and "Lectures." Indirect communication methods have from paper-based to ICT.

For direct communications such as face-to-face or onsite interactions, the most common methods were "Exchanges at entering/leaving time" and "Individual parent-teacher conferences." Approximately 80-90% of childcare facilities use these methods. These one-to-one communications increased across all childcare facility types, likely due to the COVID-19 pandemic. In contrast, group communications such as "Classroom conferences," "Parent-teacher meetings," and "Lectures" decreased (Figure 1-6-1). For indirect communication methods such as communication notebooks, "Paper parent-teacher notebooks" decreased, while "Electronic parent-teacher notebooks" and "Social media" increased (Figure 1-6-2).

Q **At your facility, how do you notify parents about facility information and their children? Please select all that apply to you.**

Figure 1-6-1 **Methods of direct communications such as face-to-face or onsite interactions** (chronological comparison per facility type) [Answered by principals]
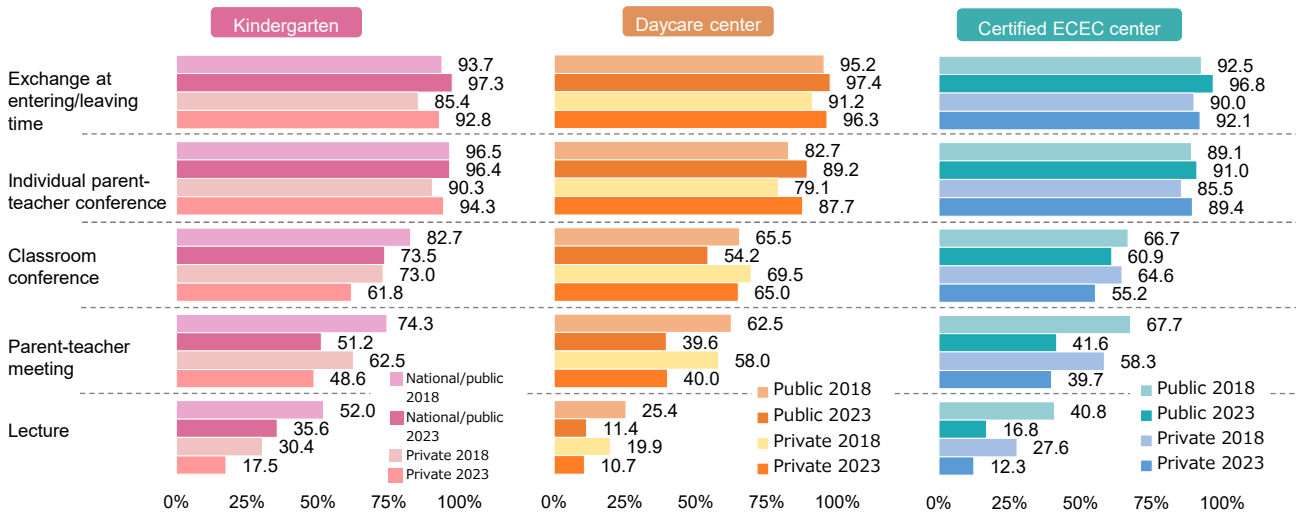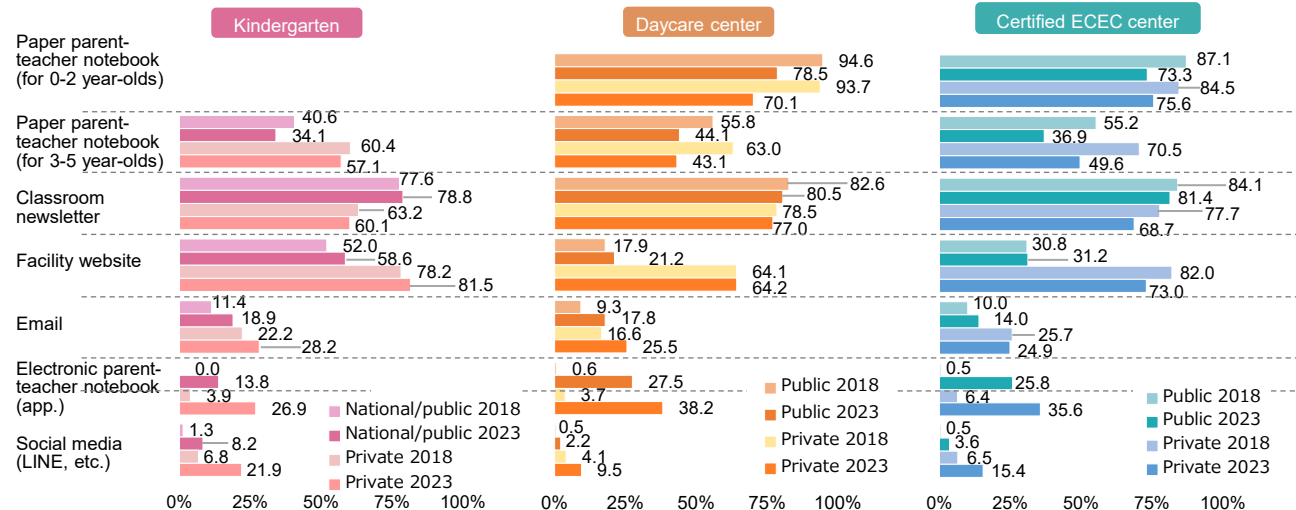
Kindergarten / Daycare center / Certified ECEC center

Exchange at entering/leaving time
- Kindergarten: 93.7 / 97.3 / 85.4 / 92.8
- Daycare center: 95.2 / 97.4 / 91.2 / 96.3
- Certified ECEC center: 92.5 / 96.8 / 90.0 / 92.1

Individual parent-teacher conference
- Kindergarten: 96.5 / 96.4 / 90.3 / 94.3
- Daycare center: 82.7 / 89.2 / 79.1 / 87.7
- Certified ECEC center: 89.1 / 91.0 / 85.5 / 89.4

Classroom conference
- Kindergarten: 82.7 / 73.5 / 73.0 / 61.8
- Daycare center: 65.5 / 54.2 / 69.5 / 65.0
- Certified ECEC center: 66.7 / 60.9 / 64.6 / 55.2

Parent-teacher meeting
- Kindergarten: 74.3 / 51.2 / 62.5 / 48.6
- Daycare center: 62.5 / 39.6 / 58.0 / 40.0
- Certified ECEC center: 67.7 / 41.6 / 58.3 / 39.7

Lecture
- Kindergarten: 52.0 / 35.6 / 30.4 / 17.5
- Daycare center: 25.4 / 11.4 / 19.9 / 10.7
- Certified ECEC center: 40.8 / 16.8 / 27.6 / 12.3

Legend (Kindergarten): National/public 2018, National/public 2023, Private 2018, Private 2023
Legend (Daycare center): Public 2018, Public 2023, Private 2018, Private 2023
Legend (Certified ECEC center): Public 2018, Public 2023, Private 2018, Private 2023

* Multiple answers.

† Among the nine categories of direct communication methods, such as face-to-face or onsite interactions (excluding "Other"), the five categories that showed significant changes since 2018 were presented above.

Figure 1-6-2 **Methods of indirect communications such as communication notebooks** (chronological comparison per facility type) [Answered by principals]

Kindergarten / Daycare center / Certified ECEC center

Paper parent-teacher notebook (for 0-2 year-olds)
- Daycare center: 94.6 / 78.5 / 93.7 / 70.1
- Certified ECEC center: 87.1 / 73.3 / 84.5 / 75.6

Paper parent-teacher notebook (for 3-5 year-olds)
- Kindergarten: 40.6 / 34.1 / 60.4 / 57.1
- Daycare center: 55.8 / 44.1 / 63.0 / 43.1
- Certified ECEC center: 55.2 / 36.9 / 70.5 / 49.6

Classroom newsletter
- Kindergarten: 77.6 / 78.8 / 63.2 / 60.1
- Daycare center: 82.6 / 80.5 / 78.5 / 77.0
- Certified ECEC center: 84.1 / 81.4 / 77.7 / 68.7

Facility website
- Kindergarten: 52.0 / 58.6 / 78.2 / 81.5
- Daycare center: 17.9 / 21.2 / 64.1 / 64.2
- Certified ECEC center: 30.8 / 31.2 / 82.0 / 73.0

Email
- Kindergarten: 11.4 / 18.9 / 22.2 / 28.2
- Daycare center: 9.3 / 17.8 / 16.6 / 25.5
- Certified ECEC center: 10.0 / 14.0 / 25.7 / 24.9

Electronic parent-teacher notebook (app.)
- Kindergarten: 0.0 / 13.8 / 3.9 / 26.9
- Daycare center: 0.6 / 27.5 / 3.7 / 38.2
- Certified ECEC center: 0.5 / 25.8 / 6.4 / 35.6

Social media (LINE, etc.)
- Kindergarten: 1.3 / 8.2 / 6.8 / 21.9
- Daycare center: 0.5 / 2.2 / 4.1 / 9.5
- Certified ECEC center: 0.5 / 3.6 / 6.5 / 15.4

Legend (Kindergarten): National/public 2018, National/public 2023, Private 2018, Private 2023
Legend (Daycare center): Public 2018, Public 2023, Private 2018, Private 2023
Legend (Certified ECEC center): Public 2018, Public 2023, Private 2018, Private 2023

* Multiple answers.

† Among the eleven categories of indirect communication methods, such as communication notebooks (excluding "Other"), the six or seven categories that showed significant changes since 2018 were presented above.

‡ The data for kindergartens did not include the "Paper Parent-Teacher Notebook (for 0-2 year-olds)" due to limited responses.

1-7 "Parents' expectations toward childcare facilities" as recognized by principals

Principals recognized that most parents expected childcare facilities to "Provide children with experiences unavailable at home" and "Teach children rules of communal life."

Principals recognized that parents primarily expected childcare facilities to "Provide children with experiences not available at home" and "Teach children the rules of communal life." However, fewer parents chose "Highly expecting" for aspects such as "Increasing opportunity for learning letters and numbers" and "Providing extra-curricular lessons after standard childcare hours" (Figure 1-7-1). Parents' top six expectations from childcare facilities were consistent across all childcare facility types. Since 2018, more parents expect childcare facilities to "Provide children with experiences unavailable at home," "Want to communicate with ECEC teachers," "Increase opportunity for free play," and "Make childrearing consultation available." In particular, "Want to communicate with ECEC teachers" increased by more than 10 points in many childcare facilities (Figure 1-7-2).

Q What do you think parents of children enrolled at your facility expect from the facility? Please select one that applies to your facility for each item based on their expectation level, regardless of availability.

Figure 1-7-1 "Parents' expectations toward childcare facilities" as recognized by principals (per facility type, 2023)

Answered by principals

(%)

	Kindergarten		Daycare center		Certified ECEC center	
	National/public	Private	Public	Private	Public	Private
Provide children with experiences unavailable at home	**79.1**	**73.1**	**53.5**	**59.6**	**67.0**	**70.2**
Teach children rules of communal life	**61.7**	**52.9**	37.4	35.1	46.2	43.0
Want to communicate with ECEC teachers	49.4	34.4	33.9	33.7	38.4	32.9
Increase opportunity for free play	45.2	37.2	25.2	30.4	29.0	32.8
Make childrearing consultation available	28.1	20.0	18.8	18.9	21.5	19.2
Teach them how to deal with children (how to praise, scold)	22.0	15.7	13.6	16.9	12.9	15.8
Extend childcare hours	19.2	11.0	5.7	5.1	10.8	8.8
Support interaction among parents	16.9	12.5	9.3	11.4	11.1	13.0
Provide temporary care when family member is sick	6.7	10.2	20.9	23.6	21.9	22.3
Let parents participate in the facility operation	3.6	3.5	2.4	4.1	2.9	4.7
Increase opportunity for learning letters and numbers	1.6	6.0	3.8	7.4	3.2	8.0
Provide extra-curricular lessons after standard childcare hours	1.3	14.2	1.1	5.3	0.7	6.6

* Percentage of responses indicating "Highly expecting."
† The data is presented in descending order according to the responses for national/public kindergartens. Values in the 70% range are highlighted in **red**, those in the 60% range are in **blue**, and those in the 50% range are in **green**.

Figure 1-7-2 "Parents' expectations toward childcare facilities" as recognized by principals (chronological comparison per facility type)

Answered by principals

(%)

	Kindergarten				Daycare center				Certified ECEC center			
	National/public		Private		Public		Private		Public		Private	
	2018	2023	2018	2023	2018	2023	2018	2023	2018	2023	2018	2023
Provide children with experiences unavailable at home	71.6 < 79.1		63.4 < 73.1		44.8 < 53.5		54.1 < 59.6		**52.7 < 67.0**		62.2 < 70.2	
Teach children rules of communal life	63.0 61.7		50.7 52.9		38.8 37.4		36.7 35.1		41.3 46.2		41.9 43.0	
Want to communicate with ECEC teachers	**37.1 < 49.4**		**23.9 < 34.4**		**23.1 < 33.9**		**23.6 < 33.7**		**23.9 < 38.4**		26.1 < 32.9	
Increase opportunity for free play	**32.5 < 45.2**		30.4 < 37.2		16.4 < 25.2		**20.3 < 30.4**		**16.4 < 29.0**		23.7 < 32.8	
Make childrearing consultation available	18.8 < 28.1		12.4 < 20.0		11.8 < 18.8		14.7 18.9		17.4 21.5		15.4 19.2	
Provide temporary care when family member is sick	11.7 > 6.7		10.9 10.2		19.0 20.9		23.3 23.6		23.9 21.9		18.8 22.3	

* Percentage of responses indicating "Highly expecting."
† The data is presented in descending order according to the responses for national/public kindergartens.
‡ Values that differ by 5 points or more are marked with ">" or "<." Differences of 10 points or more are highlighted in **blue.**

11

2-1   Response of childcare facilities to the "National Curriculum Standard/Guidelines"
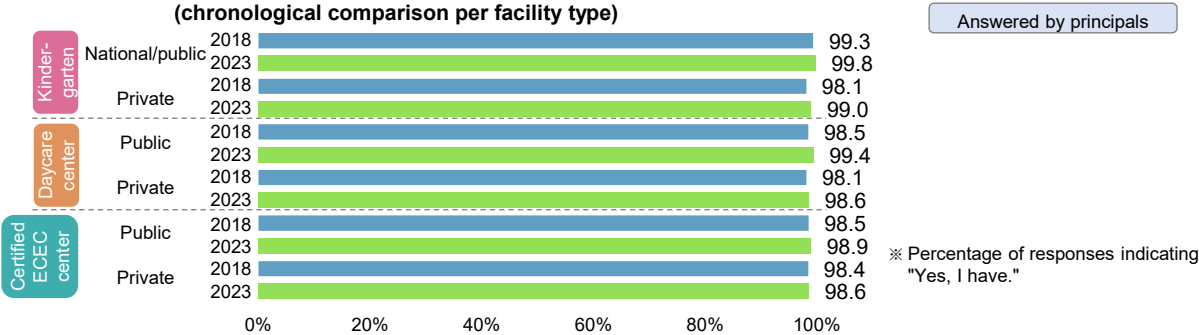
Since 2018, the number of onsite training and study seminars on the "National Curriculum Standard/Guidelines" decreased, while opportunities for childcare review remained relatively stable.

Since the 2017 revision, more than 90% of the respondents answered, "I have read books, magazines, or documents about the National Curriculum Standard/Guidelines," nearly the same as five years ago (Figure 2-1-1). However, as the percentage of holding in-house training and study workshops regarding the National Curriculum Standard/Guidelines dropped since 2018, the percentage of national/public kindergartens exceeded that of private kindergartens by 26.7 points, while the percentage of public certified ECEC centers exceeded that of their private counterparts by 16.2 points (Figure 2-1-2). Opportunities for childcare review following the "National Curriculum Standard/Guidelines" were provided at all childcare facility types and remained largely unchanged since 2018. Nonetheless, distinctions were observed between national/public kindergartens/certified ECEC centers and their private counterparts (Figure 2-1-3).
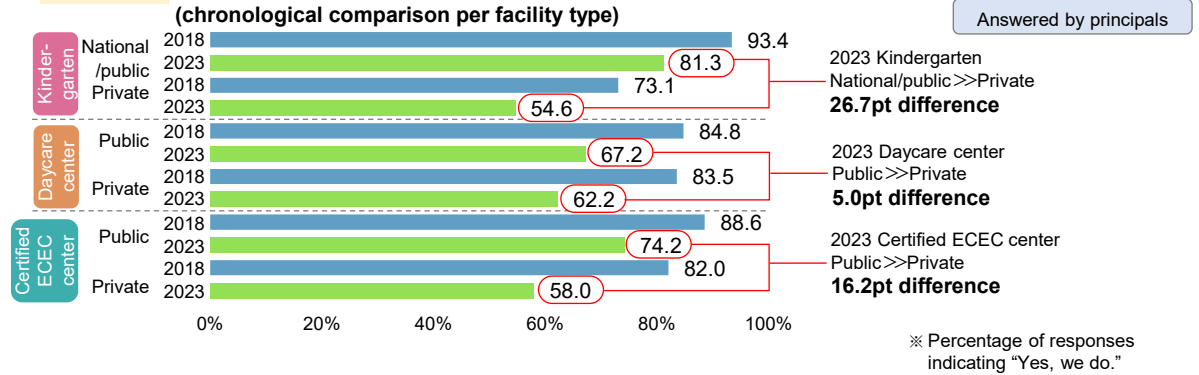
Q **Have you read any books, magazines, or documents about the "National Curriculum Standard/Guidelines"?**

Figure 2-1-1 Have you read any books, magazines, or documents about the "National Curriculum Standard/Guidelines"? (chronological comparison per facility type)
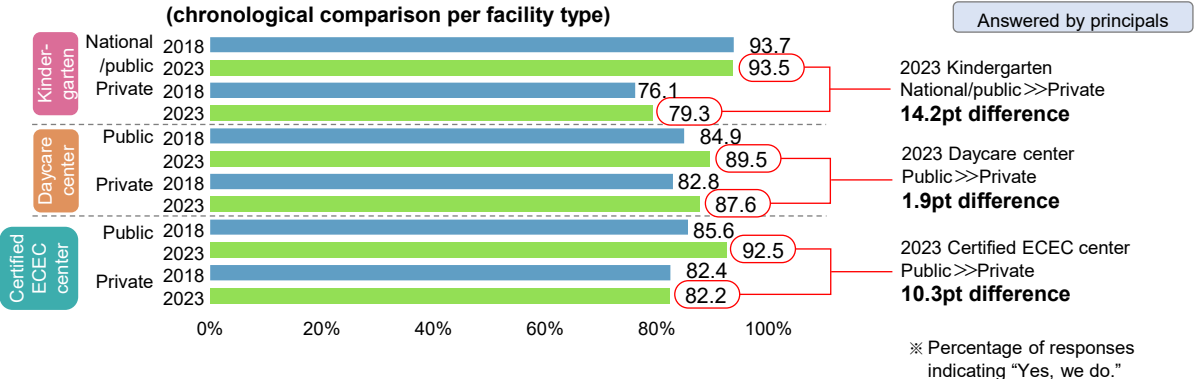
Answered by principals

※ Percentage of responses indicating "Yes, I have."

Q **Does your facility provide opportunities for in-house training or study sessions regarding the "National Curriculum Standard/Guidelines"?**

Figure 2-1-2 Opportunities for in-house training or study sessions regarding the "National Curriculum Standard /Guidelines" (chronological comparison per facility type)

Answered by principals

2023 Kindergarten National/public≫Private **26.7pt difference**

2023 Daycare center Public≫Private **5.0pt difference**

2023 Certified ECEC center Public≫Private **16.2pt difference**

※ Percentage of responses indicating "Yes, we do."

Q **Does your facility provide opportunities for childcare review among ECEC teachers in compliance with the "National Curriculum Standard/Guidelines"?**

Figure 2-1-3 Opportunities for childcare review in compliance with the "National Curriculum Standard /Guidelines" (chronological comparison per facility type)

Answered by principals

2023 Kindergarten National/public≫Private **14.2pt difference**

2023 Daycare center Public≫Private **1.9pt difference**

2023 Certified ECEC center Public≫Private **10.3pt difference**

※ Percentage of responses indicating "Yes, we do."

2-2　Focused aspects in achieving educational and childcare goals

Educational and childcare goals associated with "play" were emphasized in all childcare facility types.

The top five items were all linked to play and lifestyle habits. These included "To be interested in various things through play," "To play freely," and "To acquire basic lifestyle habits" (Figure 2-2-1). Compared to 2018, there were significant changes in the items "To be interested in various things through play" and "To play freely," which increased by 5 to over 20 percentage points in most childcare facility types. These results highlight that the importance of "learning through play," as noted in the "National Curriculum Standard/Guidelines," is widely recognized and accepted. However, some items, such as "To develop rich emotions and sensitivity" and "To be considerate to others," declined compared to 2018. This decrease may be influenced by the requirement to "select up to three items," which could have led to these options being overlooked in favor of more appealing choices. Therefore, this trend does not imply that emotions, sensitivity, and compassion were considered less important (Figure 2-2-2).

Q Please select up to three items from the following list that your facility especially focuses on as goals or contents of education and childcare.

Figure 2-2-1 Focused aspects in achieving educational and childcare goals (all facility types, 2023)

Answered by principals

(%)

	1st		2nd		3rd		4th		5th	
Kinder-garten	To be interested in various things through play	46.4	To play freely	40.1	To acquire basic lifestyle habits	29.3	To take care of friends and get along well	29.1	To acquire thinking skills	26.6
Daycare center	To develop a healthy body	42.8	To be interested in various things through play	41.8	To play freely	41.4	To acquire basic lifestyle habits	34.6	To be considerate to others	29.1
Certified ECEC center	To be interested in various things through play	40.7	To play freely	38.7	To develop a healthy body	36.1	To acquire basic lifestyle habits	35.2	To be considerate to others	29.7

* Multiple answers (up to 3).
† The top five items out of 18 items (including "Other") are presented.

Figure 2-2-2 Focused aspects in achieving educational and childcare goals (chronological comparison per facility type)

Answered by principals

(%)

	Kindergarten				Daycare center				Certified ECEC center			
	National/public		Private		Public		Private		Public		Private	
	2018	2023	2018	2023	2018	2023	2018	2023	2018	2023	2018	2023
To be interested in various things through play	30.5 < 53.5		24.9 < 38.7		28.6 < 44.3		28.8 < 39.4		24.4 < 46.2		25.9 < 39	
To play freely	35.3 < 45		29.8	34.4	32.3 < 41.4		26.4 < 41.2		36.3	36.9	27.5 < 39.3	
To take care of friends and get along well	29.2	30.7	22.6	27.2	23	21.2	20.7	20	14.9 < 26.2		17.3	20.5
To acquire thinking skills	32	29	23.2	23.9	19.6	23.9	21.9	24.4	29.4	25.8	26	22.8
To develop a healthy body	32.5 > 25.8		27.3	26.7	45.8	47.1	39.8	38.7	39.3	38.4	34.5	35.4
To acquire basic lifestyle habits	25.7	23.2	32.1	36.2	32	32.7	34	36.3	33.3	34.8	28.4 < 35.4	
To develop rich emotions and sensitivity	19.1	22.3	23 > 17.2		21.4	20.4	21.9	22.1	22.9 > 16.1		27.2 > 21.2	
To be considerate to others	28.5 > 18.5		35.5	30.7	39.5 > 30.3		35.8 > 28		33.8 > 27.2		34.7	30.5
To develop tenacity	13.9	16.3	9.8	7.5	3.9	4.8	6	4.2	7	10	7.7	7
To express thoughts clearly and listen to others carefully	18.5	13.8	14.2	13.2	14.4 > 7.7		12.6	8.9	18.9 > 13.6		10.8	10
To be exposed to nature	5.9	8	8.3 < 16		8.7	11.1	9.7	13.3	7.5	11.5	10.5 < 16.3	

* Multiple answers (up to 3).
† Eleven items out of 18 (including "Other") are presented, which recorded more than 10% of responses in any child facility.
‡ The data is presented in descending order according to the responses for national/public kindergartens (2023).
** Values that differ by 5 points or more are marked with ">" or "<." Differences of 10 points or more are highlighted in **blue**, while differences of 20 points or more are highlighted in **red**.
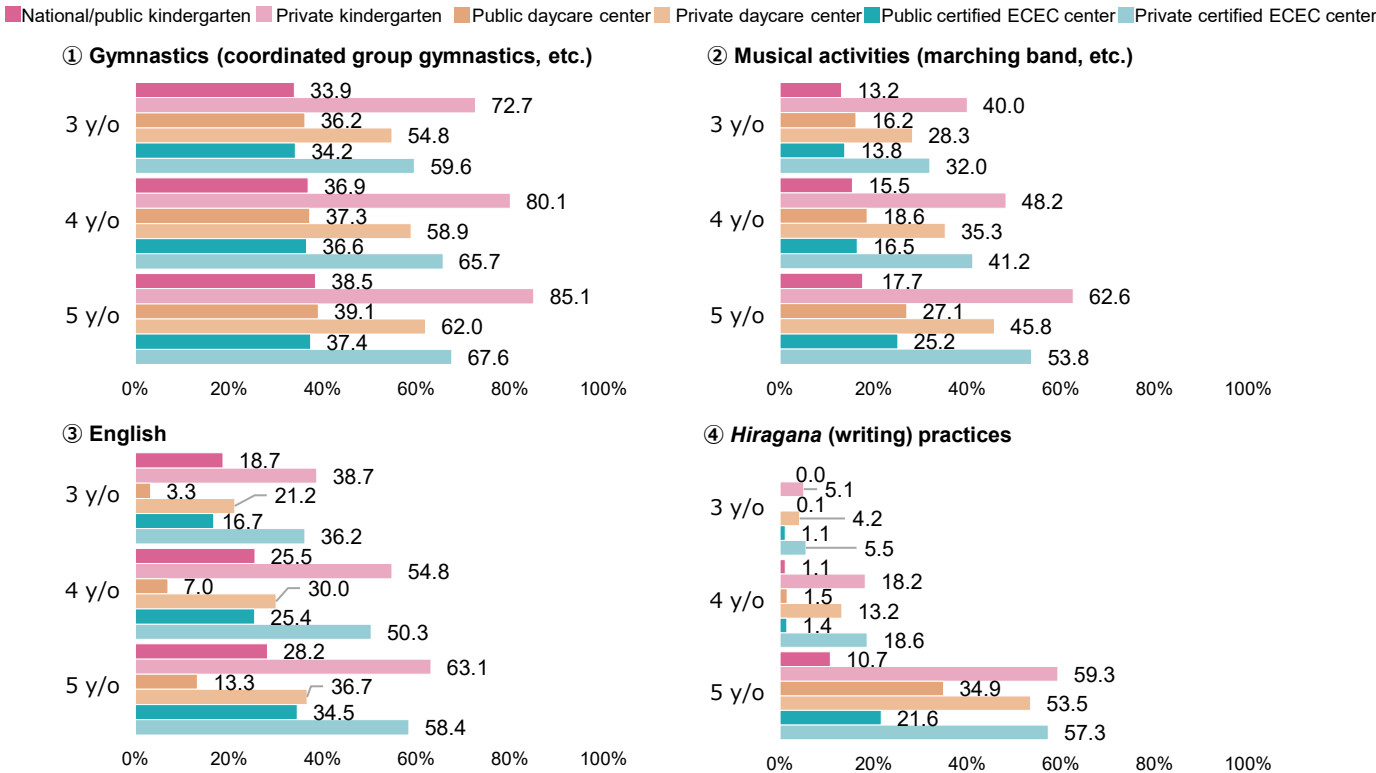
2-3　Current activities during regular childcare hours

Compared to national/public counterparts, more private childcare facilities offer activities such as "gymnastics," "music," "English," and "*hiragana*," in addition to integrated activities through play.

During regular childcare hours, private childcare facilities engage in varied activities. More than 70% of private kindergartens offer gymnastics, 40-60% provide music sessions, and 30-60% provide English activities. The rate of implementation increased with children's age. Additionally, more than 50% of private kindergartens offer "*hiragana* writing practices" for 5-year-olds (Figure 2-3-1). Our chronological comparison analysis indicated that the implementation rate of such activities was increasing, particularly in private kindergartens (Figure 2-3-2).

Q **In addition to integrated activities through play as stated in the "National Curriculum Standard/Guidelines," does your facility provide the following activities to all children in the class during regular childcare hours? If so, please select all that apply to the target age group for the activity.**

Figure 2-3-1 Implementation rate of each activity per age group (per facility type, 2023)　[Answered by principals]

■National/public kindergarten　■Private kindergarten　■Public daycare center　■Private daycare center　■Public certified ECEC center　■Private certified ECEC center

① Gymnastics (coordinated group gymnastics, etc.)

3 y/o: 33.9 / 72.7 / 36.2 / 54.8 / 34.2 / 59.6
4 y/o: 36.9 / 80.1 / 37.3 / 58.9 / 36.6 / 65.7
5 y/o: 38.5 / 85.1 / 39.1 / 62.0 / 37.4 / 67.6

② Musical activities (marching band, etc.)

3 y/o: 13.2 / 40.0 / 16.2 / 28.3 / 13.8 / 32.0
4 y/o: 15.5 / 48.2 / 18.6 / 35.3 / 16.5 / 41.2
5 y/o: 17.7 / 62.6 / 27.1 / 45.8 / 25.2 / 53.8

③ English

3 y/o: 18.7 / 38.7 / 3.3 / 21.2 / 16.7 / 36.2
4 y/o: 25.5 / 54.8 / 7.0 / 30.0 / 25.4 / 50.3
5 y/o: 28.2 / 63.1 / 13.3 / 36.7 / 34.5 / 58.4

④ *Hiragana* (writing) practices

3 y/o: 0.0 / 5.1 / 0.1 / 4.2 / 1.1 / 5.5
4 y/o: 1.1 / 18.2 / 1.5 / 13.2 / 1.4 / 18.6
5 y/o: 10.7 / 59.3 / 34.9 / 53.5 / 21.6 / 57.3

* Multiple answers.
† Percentage of responses indicating "Providing the activity."
‡ Only the data for 3-year-old or older are presented.
** The figures illustrate only the top four activities offered by childcare facilities for all children.

Figure 2-3-2 Implementation rate of each activity (private kindergarten; chronological comparison)　[Answered by principals]

■2007/2008　■2012　■2018　■2023

Gymnastics (coordinated group gymnastics, etc.): 75.0 / 78.5 / 80.6 / 88.0
English: 47.6 / 58.0 / 62.4 / 65.3
Musical activities (marching band, etc.): 57.4 / 59.0 / 60.2 / 64.3
Hiragana (writing) practices: 46.2 / 52.3 / 56.0 / 59.9

* Multiple answers.
† Percentage of responses indicating "Providing the activity."
‡ The figures illustrate only the top four activities offered by childcare facilities for all children.

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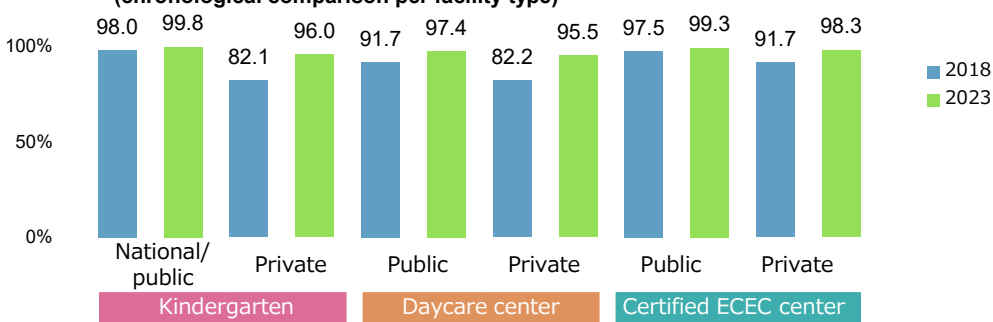
2-4　Cooperation/collaboration with elementary schools

The number of childcare facilities collaborating with elementary schools had increased since 2018.

The number of childcare facilities collaborating with elementary schools had increased since 2018. Although more than 90% of national/public kindergartens, public daycare centers, and public/private certified ECEC centers were already engaged in cooperation/collaboration with elementary schools in 2018, these figures continued to rise. Private kindergartens increased by approximately 14 points and private daycare centers by around 13 points (Figure 2-4-1). Our analysis of collaborative activities revealed that the most common activity was to "Transfer information about children requiring special consideration to elementary schools." Additionally, 30-50% of childcare facilities "Conduct regular case reviews during joint meetings of kindergartens, daycare centers, and elementary schools." This collaboration is a key component of the Early Childhood to School Transition Program. Furthermore, 10-40% of childcare facilities "Discuss the educational significance and effectiveness of learning through play with elementary school teachers." Notably, more national/public kindergartens and certified ECEC centers participated in collaborative activities than their private counterparts (Figure 2-4-2).

Q **Does your facility participate in collaborative or cooperative activities with local elementary schools? Please select all that apply.**

Figure 2-4-1 Cooperation/collaboration with elementary schools (chronological comparison per facility type)　　[Answered by principals]

* Percentage of responses indicating "We collaborate/cooperate."
† The question in the 2018 survey was, "Does your facility provide interactive activities with local elementary schools?"

Q **What collaborative or cooperative activities does your facility participate in?**

Figure 2-4-2 Details of collaborative/cooperative activities (per facility type, 2023)　　[Answered by principals]

(%)

	Kindergarten		Daycare center		Certified ECEC center	
	National/public	Private	Public	Private	Public	Private
For ECEC/elementary school teachers Transfer information about children requiring special consideration to elementary schools	**96** >	**83.5**	87.5 >	78.9	93.9 >	84.8
Discuss the educational significance and effectiveness of learning through play with elementary school teachers.	**45.9** >	**14.2**	21.3	18.3	**38** >	**18**
Conduct regular case reviews during joint meetings of kindergartens, daycare centers, and elementary schools	38.1 <	46.9	45 <	51.9	**35.5** <	**48.6**
Elementary school teachers teach children of childcare facilities	11.6 >	3.7	8.5	7.8	10.4 >	5.3
For preschool/elementary school children Children from childcare facilities have tours or class visits to elementary schools	**82** >	**57.6**	57.4	56.1	69.5 >	62.6
Children from childcare facilities join in activities with elementary schools	**76.4** >	**47.4**	49.7	45.6	**69.2** >	**53.7**
Children from childcare facilities visit events at elementary schools such as sports days or recitals	**48.1** >	**13.7**	24.7	23.8	35.1 >	26.5
Children from childcare facilities listen to principals or teachers at elementary schools	**45.7** >	**13.2**	20	15.7	**35.1** >	**20**
Children from childcare facilities have school lunch at elementary schools	**30.5** >	**3.2**	6.1	5.2	9.3	6.4
Children from childcare facilities participate in events at elementary schools such as sports day or recitals	**20.7** >	**8.5**	12.4	12.4	21.9 >	12.3
Elementary school students visit to see or participate in events at childcare facilities	**25.8** >	**14**	14.8	17.6	22.2 >	16.8

* Multiple answers.
† Only facilities that collaborate/cooperate with elementary schools were included.
‡ Values that differ by 5 points or more are marked with ">" or "<." Differences of 10 points or more are highlighted in **blue**, while differences of 20 points or more are highlighted in **red**.
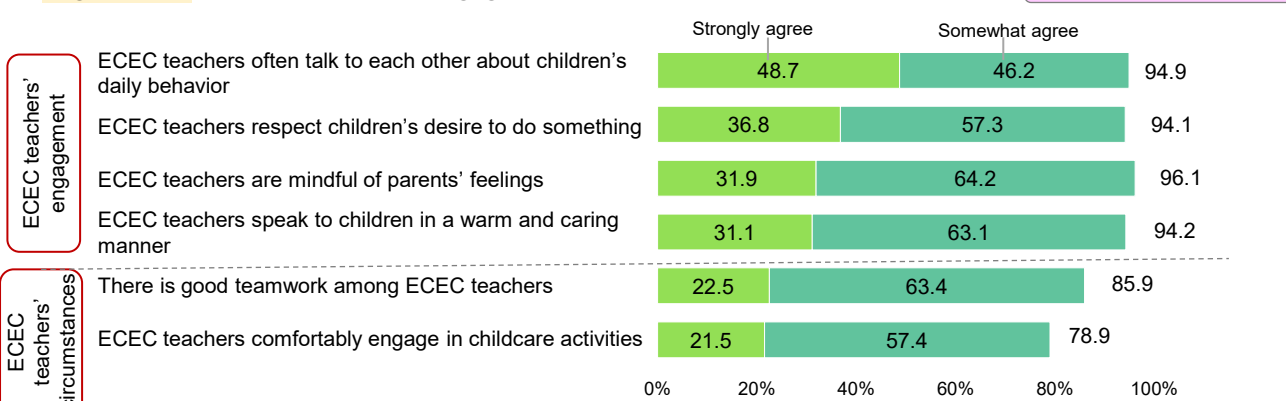
3-1 Circumstances of ECEC teachers and childcare facilities

ECEC teachers often talk to each other about children's daily behavior and respect children's "desire to do something."

When asked about their engagement with children at work, more than 90% of ECEC teachers answered, "Strongly agree" or "Somewhat agree" to all the questions. For "ECEC teachers often talk to each other about children's daily behavior," the number of ECEC teachers who answered "Strongly agree" was relatively high, reaching 48.7% (Figure 3-1-1). Meanwhile, when asked about their working conditions, only 22.5% of ECEC teachers answered, "There is good teamwork among ECEC teachers," and only 21.5% answered, "ECEC teachers comfortably engage in childcare activities" (Figure 3-1-1). Regarding their work environment, 42.1% of ECEC teachers answered, "The facility offers a variety of expressive activities, such as drawing, craft, and music," and 41.1% answered, "The facility uses teaching materials and picture books suitable to each season and related activities," with a significant number of teachers choosing "Strongly agree." However, regarding engagement with the local community, the percentage of ECEC teachers who chose "Strongly agree" was notably lower than the other items, remaining in the 10% range (Figure 3-1-2).

Q **Please tell us about your facility's current circumstances. Select one of the options below that applies to your facility.**

Figure 3-1-1 Circumstances and engagement of ECEC teachers (overall, 2023) [Answered by ECEC teachers]

* The data is presented in descending order according to the number of "Strongly agree" responses.

Figure 3-1-2 Circumstances of childcare facilities and their engagement with the local community (overall, 2023) [Answered by ECEC teachers]

* The data is presented in descending order according to the number of "Strongly agree" responses.

3-2　Opportunities for discussions in childcare facilities

In all childcare facility types, 60% of ECEC teachers chose "Often do so" for the item "ECEC teachers keep a record of children's activities." However, 10-30% gave this response for the item "Children reflect on their own activities."
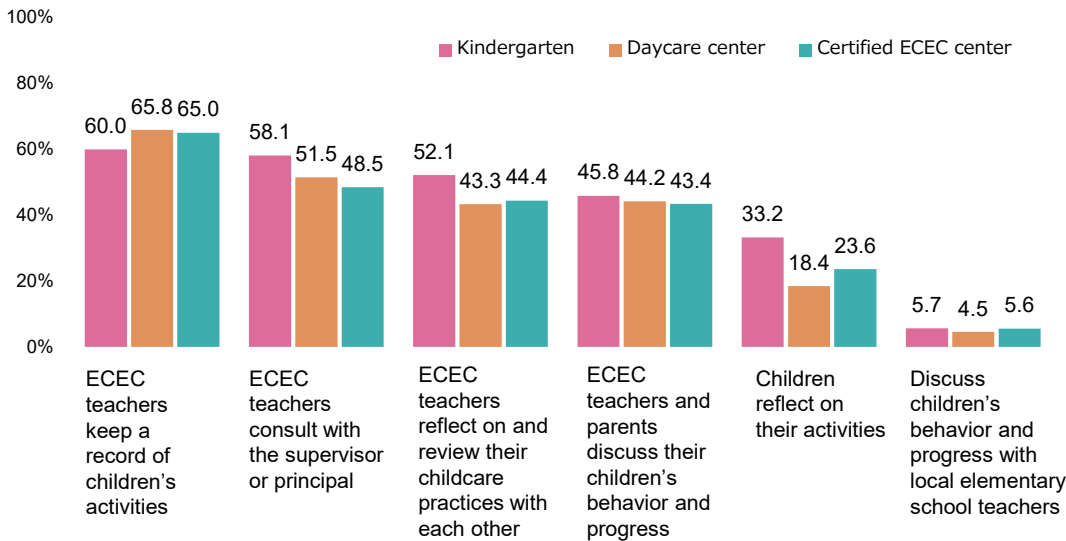
When asked about discussion opportunities in childcare facilities, about 60% of ECEC teachers chose "Often do so" for "ECEC teachers keep a record of children's activities." Additionally, 40-50% chose this response for "ECEC teachers consult with the supervisor or principal," "ECEC teachers reflect on and review their childcare practices with each other," and "ECEC teachers and parents discuss their children's behavior and progress." The results for "Children reflect on their own activities" varied significantly by facility type. Among the ECEC teachers, 30% from kindergartens chose "Often do so," while only 10-20% from daycare centers and certified ECEC centers chose this option (Figure 3-2-1). When the responses were examined based on the facility type, significant differences emerged between national/public and private kindergartens, whereas public and private daycare centers showed slight variation. Regarding kindergartens and certified ECEC centers, the percentage of ECEC teachers at national/public facilities who chose "Often do so" for the item "Children reflect on their activities" was 10 points higher than that at private facilities (Figure 3-2-2).

Q How often does your facility do the following?

**Figure 3-2-1　Opportunities for discussions in childcare facilities
(Kindergartens, daycare centers, and certified ECEC centers; 2023)**　Answered by ECEC teachers

* Percentage of responses indicating "Often do so."
† The data is presented in descending order according to the responses for kindergartens.

Figure 3-2-2　Opportunities for discussions at childcare facilities (per facility type; 2023)　Answered by ECEC teachers

(%)

	Kindergarten		Daycare center		Certified ECEC center	
	National/public	Private	Public	Private	Public	Private
ECEC teachers keep a record of children's activities	64.8 >	56.6	63.1	67.9	64.8	64.9
ECEC teachers consult with the supervisor or principal	62.5 >	55.1	53.7	49.8	50.9	47.9
ECEC teachers reflect on and review their childcare practices with each other	55.1 >	50.1	42.8	43.5	44.8	44.0
ECEC teachers and parents discuss their children's behavior and progress	49.0 >	43.9	43.0	44.9	44.6	43.0
Children reflect on their activities	**44.6 >**	**25.2**	17.5	19.0	**31.8 >**	**21.6**
Discuss children's behavior and progress with local elementary school teachers	6.5	5.1	4.2	4.8	5.7	5.5

* Percentage of responses indicating "Often do so."
† The data is presented in descending order according to the responses for national/public kindergartens.
‡ Values that differ by 5 points or more are marked with ">" or "<." Differences of 10 points or more are highlighted in **blue**.

3-3 Evaluation of children's growth related to emotions, motivation, and attitudes (4-5-year-olds)

According to ECEC teachers, the most developed ability related to emotions, motivation, and attitudes for 4-5-year-olds is the "Ability to cooperate with friends during play and other activities."

In this section, ECEC teachers in charge of 4-5-year-old's classes in all childcare facility types were asked to evaluate how well children developed 17 abilities related to emotions, motivation, and attitudes. After categorizing these 17 abilities into three areas—"Self-assertion/Self-expression," "Cooperativeness/Empathetic Skills," and "Curiosity/Tenacity"—and conducting an analysis, it was evident that children generally exhibited development in all three areas. Notably, "Cooperativeness/Empathetic Skills" were particularly well-developed, exemplified by "Ability to cooperate with friends in play and other activities." However, some abilities remain at relatively low levels, such as "Have confidence in oneself" (27.7%), "Ability to express own opinion even if it differs from friends" (27.2%), "Ability to avoid doing things one desires if others dislike those actions" (25.0%), "Ability to persistently pursue and achieve goals" (27.0%), and "Ability to innovate by embracing a process of trial and error" (19.0%).

Q Please evaluate how well children in your class have developed the following abilities related to emotions, motivation, and attitudes.

Figure 3-3-1 Evaluation of children's growth related to emotions, motivation, and attitudes [Self-assertion/Self-expression] (Overall, 2023) | Answered by ECEC teachers
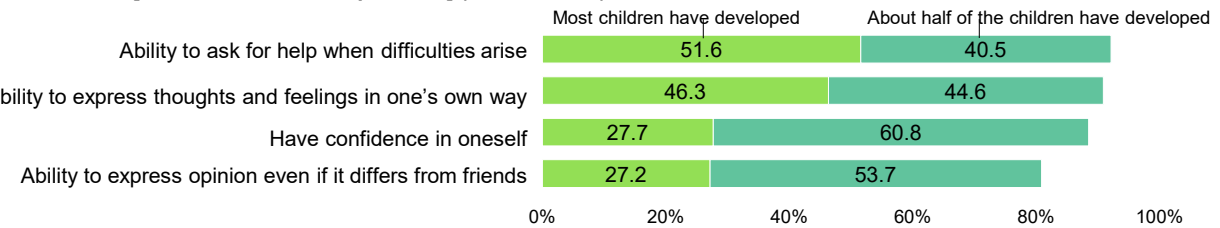

Figure 3-3-2 Evaluation of children's growth related to emotions, motivation, and attitudes [Cooperative/Empathetic skills] (Overall, 2023) | Answered by ECEC teachers
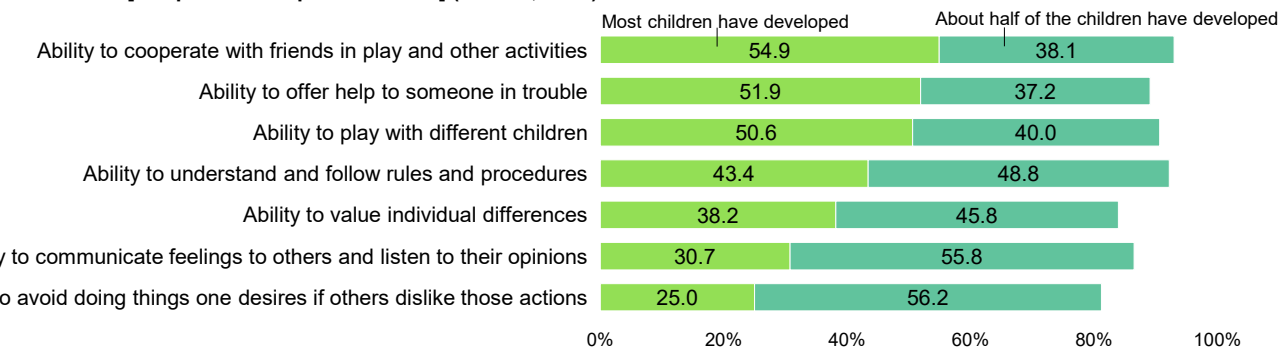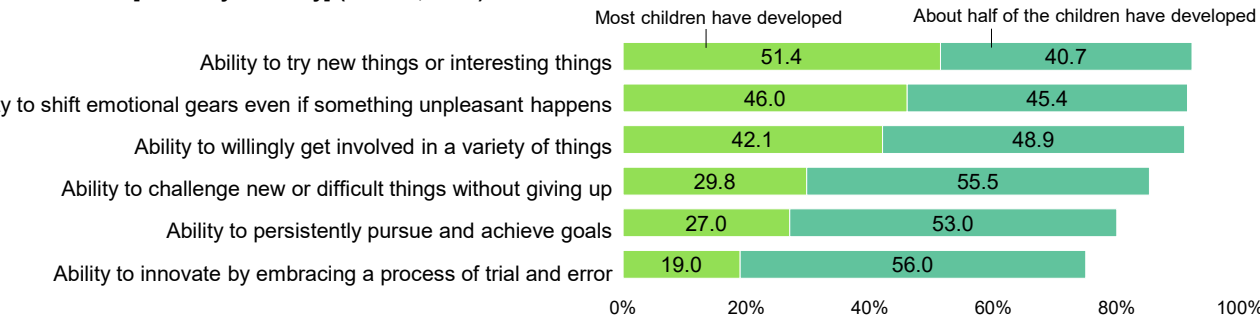

Figure 3-3-3 Evaluation of children's growth related to emotions, motivation, and attitudes [Curiosity/Tenacity] (Overall, 2023) | Answered by ECEC teachers

* ECEC teachers were asked to evaluate using the following four-item scale: "Most children have developed," "About half of children have developed," "Some children have developed," and "Most children have not developed."
† The data is presented in descending order according to the number of "Most children have developed" responses (Figure 3-3-1 through Figure 3-3-3).
‡ The figures illustrate only the responses of ECEC teachers in charge of 4-5-year-old classes in all childcare facility types (Figure 3-3-1 through Figure 3-3-3).
** For mixed-age classes, the responses were provided by extracting the data of 4- and 5-year-olds.

3-4 Requirements for improving the quality of ECEC teachers

The requirements for improving the quality of ECEC teachers were "Improvement in compensation" and "Improvement in staffing standards." Furthermore, the ECEC teachers valued "Providing support for mental health."

Both principals and ECEC teachers were asked to choose up to three out of 17 items needed to improve the quality of ECEC teachers. Among the responses from principals, the items that showed significant changes since 2018 were "Improvement in compensation for ECEC teachers" and "Improvement in staffing standards." "Improvement in staffing standards" increased by more than 10 points across all childcare facility types (Figure 3-4-1). When comparing the responses of principals and ECEC teachers, ECEC teachers provided higher scores to "Improvement in staffing standards," "Improvement in compensation for ECEC teachers," and "Providing support for ECEC teachers' mental health." Additionally, while ECEC teachers scored higher in "Providing support for ECEC teachers' mental health," principals provided higher scores to training-related items (Figure 3-4-2).
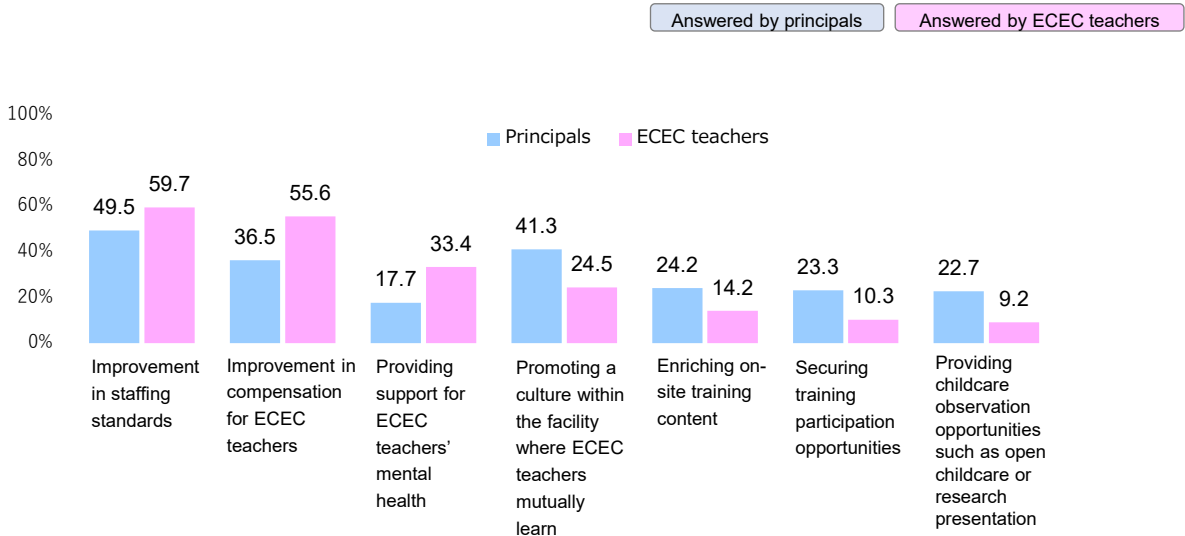
Q Please select up to three items you believe are essential for improving the quality of ECEC teachers at your facility.

Figure 3-4-1 Requirements for improving the quality of ECEC teachers (chronological comparison per facility type) 〔Answered by principals〕 （%）

	Kindergarten				Daycare center				Certified ECEC center			
	National/public		Private		Public		Private		Public		Private	
	2018	2023	2018	2023	2018	2023	2018	2023	2018	2023	2018	2023
Improvement in compensation for ECEC teachers	**12.5 < 25.4**		36.5 < 44.1		17.7 < 26.4		**32.3 < 45.5**		18.9	22.9	**25.5 < 43.1**	
Improvement in staffing standards	**20.1 < 36.7**		**11.0 < 25.7**		**33.6 < 60.4**		**25.3 < 58.5**		**26.9 < 50.2**		**18.3 < 46.5**	
Promoting a culture within the facility where ECEC teachers mutually learn	30.7 < 37.2		39.0	39.4	**32.9 < 43.8**		42.5	43.1	40.8	40.1	45.8 > 39.7	
Enriching on-site training content	38.6 > 33.6		27.8	25.7	27.3	22.8	23.5	19.3	29.9	32.3	28.2 > 22.7	
Securing training participation opportunities	24.3	25.8	20.4	20.2	25.6	23.9	25.3	22.6	27.9	28.3	27.6 > 21.5	
Providing support for ECEC teachers' mental health	8.9	11.6	16.6	21.4	15.8	16.7	19.9	18.2	10.0 < 16.1		18.0	20.5

* Multiple answers (up to 3).
† Among the 16 items (including "Other"), only six items that showed significant changes are presented above.
‡ Values that differ by 5 points or more are marked with ">" or "<." Differences of 10 points or more are highlighted in **blue**, while differences of 20 points or more are highlighted in **red**.

Figure 3-4-2 Requirements for improving the qualities of ECEC teachers (Overall, 2023) 〔Answered by principals〕 〔Answered by ECEC teachers〕

	Principals	ECEC teachers
Improvement in staffing standards	49.5	59.7
Improvement in compensation for ECEC teachers	36.5	55.6
Providing support for ECEC teachers' mental health	17.7	33.4
Promoting a culture within the facility where ECEC teachers mutually learn	41.3	24.5
Enriching on-site training content	24.2	14.2
Securing training participation opportunities	23.3	10.3
Providing childcare observation opportunities such as open childcare or research presentation	22.7	9.2

* Multiple answers (up to 3).
† Among the 16 items (including "Other"), only seven items that showed significant differences in the responses of principals and ECEC teachers are presented above.

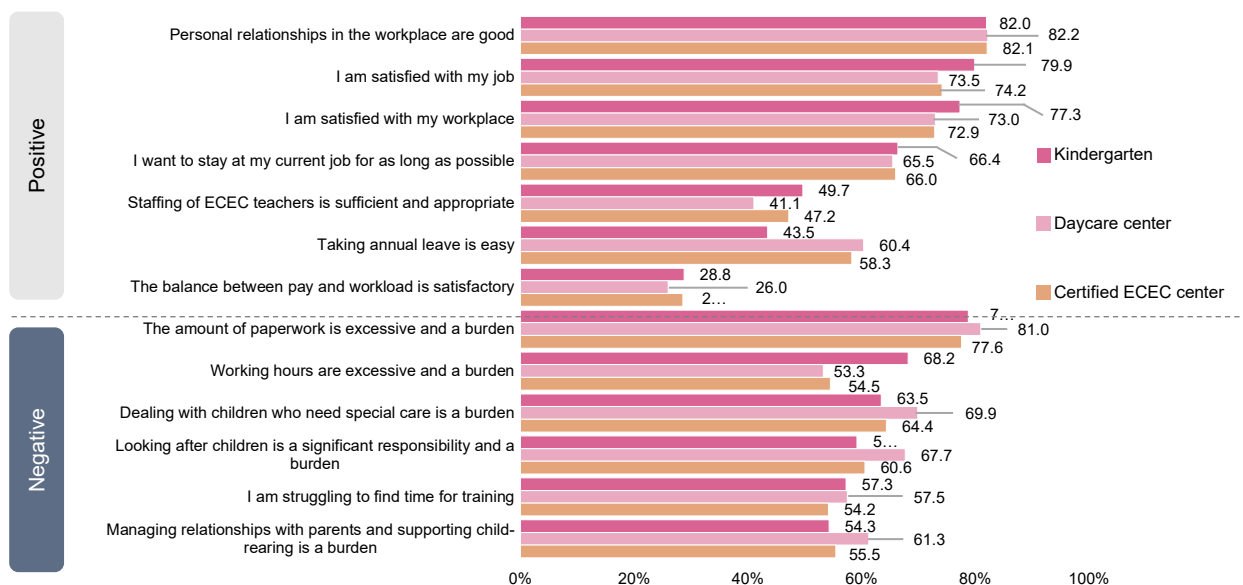# 3-5 Job satisfaction and challenges faced by ECEC teachers

Though ECEC teachers were satisfied with their workplaces and jobs, they believed the balance between salary and workload was inadequate and found the amount of paperwork excessive and burdensome.

"Personal relationships in the workplace are good," "I am satisfied with my job," and "I am satisfied with my workplace" scored as high as 70-80% across all childcare facility types. In contrast, "Staffing of ECEC teachers is sufficient and appropriate" tended to score low for daycare centers. "The balance between pay and workload is satisfactory" is also low for all types of childcare facilities, at around 20% (Figure 3-5-1). The perceived burden of work was notably high, as they chose "The amount of paperwork is excessive and burdensome," "Working hours are excessive and burdensome," "Dealing with children who require special care is a burden," and "Looking after children is a significant responsibility and burden." This sentiment was particularly pronounced in national and public childcare facilities (Figure 3-5-2).

Q **Please select the one that best describes your satisfaction and burden at work.**

Figure 3-5-1 **Job satisfaction and challenges faced by ECEC teachers (all facility types, 2023)**   Answered by ECEC teachers

* Percentage of "Strongly agree + Somewhat agree" responses.
† The data is presented in descending order by positive/negative item according to the responses for kindergartens.

Figure 3-5-2 **Job satisfaction and challenges faced by ECEC teachers (per facility type, 2023)**   Answered by ECEC teachers

(%)

	Kindergarten		Daycare center		Certified ECEC center	
	National/public	Private	Public	Private	Public	Private
Positive						
Personal relationships in the workplace are good	82.3	81.9	81.2	82.9	78.3	82.9
I am satisfied with my job	79.2	80.6	74.3	72.8	72.5	74.4
I am satisfied with my workplace	78.4	76.8	73.6	72.6	70.0	73.5
I want to stay at my current job for as long as possible	67.7	65.6	63.7	66.7	61.5 <	67.0
Staffing of ECEC teachers is sufficient and appropriate	50.5	49.3	36.9 <	44.2	41.7 <	48.6
Taking annual leave is easy	46.4	41.6	**54.0 <**	**64.9**	50.9 <	60.0
The balance between pay and workload is satisfactory	31.5	27.0	28.8	24.3	23.6 <	29.6
Negative						
The amount of paperwork is excessive and a burden	**86.9 >**	**73.1**	86.2 >	77.2	85.1 >	75.9
Working hours are excessive and a burden	73.5 >	64.3	**62.3 >**	**47.0**	**68.4 >**	**51.2**
Dealing with children who need special care is a burden	61.5	64.8	73.9 >	67.1	65.8	64.3
Looking after children is a significant responsibility and a burden	**66.0 >**	**54.3**	**76.2 >**	**61.9**	**72.9 >**	**57.7**
I am struggling to find time for training	61.9 >	54.0	62.9 >	53.9	**62.4 >**	**52.3**
Managing relationships with parents and supporting child-rearing is a burden	56.9	52.3	**67.5 >**	**57.0**	62.8 >	54.0

* Percentage of "Strongly agree + Somewhat agree" responses.
† Values that differ by 5 points or more are marked with ">" or "<." Differences of 10 points or more are highlighted in **blue**.

3-6   Issues in childcare practices and operations at childcare facilities

Key issues for kindergartens were "Attracting new children" and "Maintaining an adequate number of enrolled children."
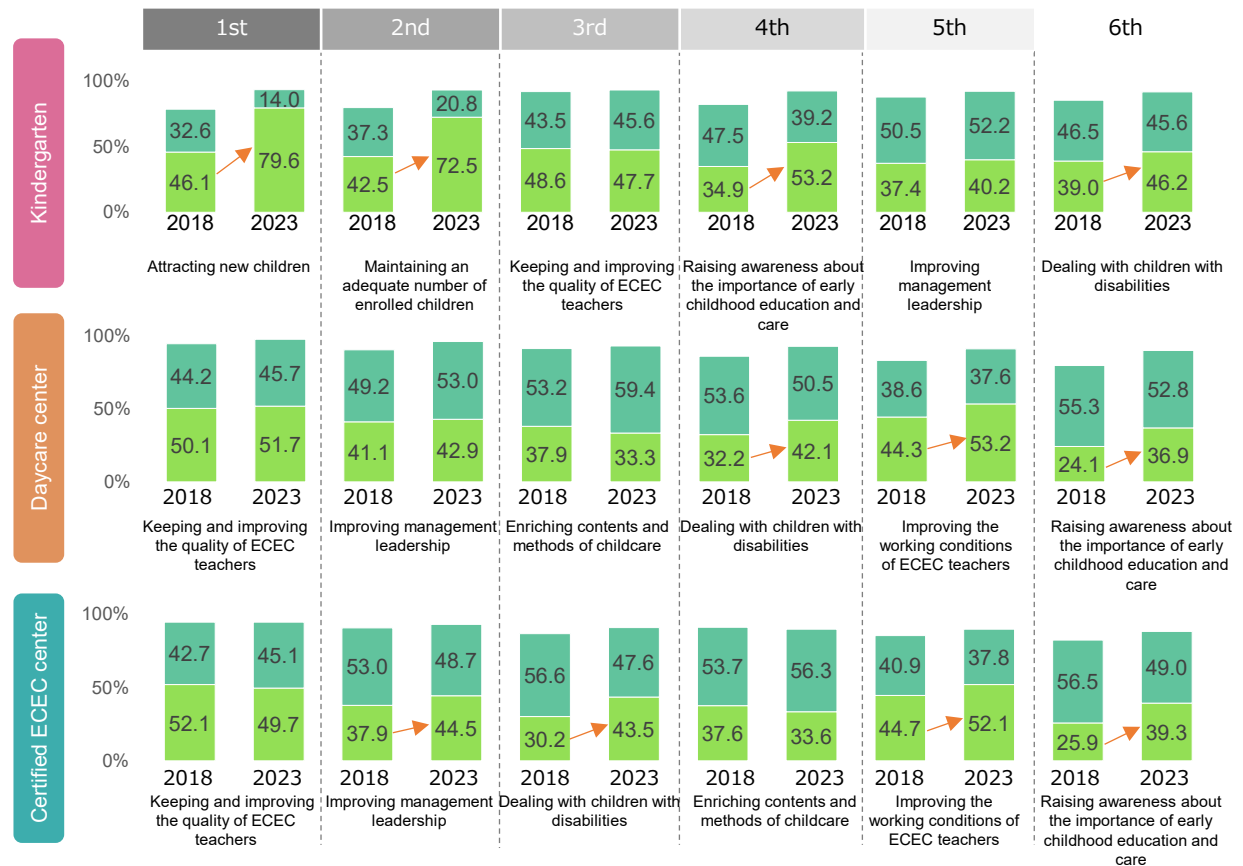
In kindergartens, the issues of "Attracting new children" and "Maintaining an adequate number of enrolled children" became more prominent, ranking among the top concerns. In daycare centers, the issues of "Dealing with children with disabilities," "Improving the working conditions of ECEC teachers," and "Raising awareness about the importance of early childhood education and childcare" were increasing. Additionally, in certified ECEC centers, the issues of "Improving management leadership," "Dealing with children with disabilities," "Improving the working conditions of ECEC teachers," and "Raising awareness about the importance of early childhood education and childcare" were also on the rise (Figure 3-6-1). When analyzing the results by facility type, differences emerge in issues related to the environment and structures of these facilities. These included "Enhancing facilities and equipment," "Taking measures for safety, crime prevention," "Securing budgets (grant, childcare fee, etc.) ," "Attracting new children," and "Maintaining an adequate number of enrolled children" (Figure 3-6-2).

Q Please tell us about issues in childcare practices and operations at your facility. Select one that applies to your facility for each item.

Figure 3-6-1 Issues in childcare practices and operations at childcare facilities (all facility types; chronological comparison)

Answered by principals

■ It is a serious concern.   ■ It is a moderate concern.

* Percentage of "Serious concern + Moderate concern" responses.
† The top six items are shown from left to right, according to the 2023 survey data.

Figure 3-6-2 Issues in childcare practices and operations at childcare facilities (per facility type, 2023)

Answered by principals

(%)

	Kindergarten		Daycare center		Certified ECEC center	
	National/public	Private	Public	Private	Public	Private
Enhancing facilities and equipment	75.3	77.3	84.7 > 69.5		74.9 > 66.4	
Taking measures for safety, crime prevention	79.3	76.0	86.5 > 71.5		80.3 > 70.0	
Securing budgets (grant, childcare fee, etc.)	69.9 < 92.8		67.5 < 82.1		66.6 < 82.9	
Attracting new children	90.2 < 97.3		38.9 < 68.6		45.2 < 78.9	
Maintaining an adequate number of enrolled children	90.4 < 96.8		57.6 < 72.9		59.5 < 81.1	
Acquiring and retaining ECEC teachers	79.3 < 89.3		84.4	83.9	86.0	83.5
Implementing self-evaluation/self-inspection	64.1 < 73.8		77.6	73.6	63.0 < 73.1	

* Percentage of "Serious concern + Moderate concern" responses.
† Only items with values differing by 10 points or more between national/public and private facilities are presented.
‡ Values that differ by 5 points or more are marked with ">" or "<." Differences of 10 points or more are highlighted in **blue**, while differences of 20 points or more are highlighted in **red**.

3-7   Issues identified through open-ended descriptions

Open-ended descriptions submitted by the ECEC teachers highlighted issues related to "Managing children with disabilities and parents" and "Shortage of ECEC teachers."

Based on the open-ended descriptions submitted by ECEC teachers, the most commonly reported issues were difficulties relating to "Managing children with disabilities and parents," "Shortage of ECEC teachers," "Securing time for training and discussions with colleagues," and "Ensuring child-centered childcare and time for play."

Q **Please share your impressions of the children and parents from your daily engagement in early childhood education and care. Please write down any practical challenges and suggestions you may have for enhancing the quality of ECEC practices at your facility, and the joy and difficulties you experience every day.**

Answered by ECEC teachers

Managing children with disabilities and parents

The issue is how to care for children who are concerned or have disabilities. Class teachers watch over these children along side other children in the class, but I still feel this isn't sufficient. I often worry about how much support I should provide, and sometimes, it's challenging to determine the boundary between being considerate and being overly supportive. (Private certified ECEC center)

As the number of children and parents in need of support is expected to increase in the future, I feel it is necessary to think about how to develop human resources and improve my skills. Providing opportunities for ECEC teachers to learn effective ways to interact with children and parents would be beneficial. (Private kindergarten)

Shortage of ECEC teachers

I want to tackle various issues to enhance the childcare quality, however, I have so many tasks to handle that I lack the time, physical energy and mental motivation to prepare for them all, which makes it difficult. There is also a shortage of personnel to assist with follow-up. Despite these challenges, I find my job rewarding when I share children's growth with their parents and receive their gratitude. (Private daycare center)

Every day, while interacting with children, I am often surprised by their inspiration and keen and sensitive eyes. I find my job rewarding when I witness their growth, build trusting relationships with them, and joyfully conduct childcare practices and events. However, I face challenges such as staff shortages, a heavy workload, and the need to address issues for each child and family. These factors make it difficult to take time off, and I often struggle to balance my work and personal life. (National/public kindergarten)

Securing time for training and discussions with colleagues

My daycare center has numerous staff members, so training and discussions are essential. However, we rarely have time for such training. As the time spent on childcare for each child is expected to increase, and as we need to support the growth of both children and parents, finding training time will become even more challenging. (Public daycare center)

I think one of the main issues in improving childcare is my busy daily schedule. I'm so busy with my daily childcare that I rarely have the chance to attend training sessions, inside and outside our facility. Furthermore, there are no opportunities for ECEC teachers to observe each other's practices or visit other childcare facilities, so we become complacent with our own methods. To truly enhance the childcare quality, it is essential to increase such opportunities and learn things from one another. (Private kindergarten)

Ensuring child-centered childcare and time for play

I want to allow children to play freely, supporting their pursuit of interests. However, most children's activities require careful attention and observation, so we sometimes end up restricting play based on our convenience. This issue frustrates me. (Private certified ECEC center)

As childcare becomes more child-centered, I consistently reflect on my practices. However, there are areas where traditional collective childcare continues, so I discuss with the staff daily how to interact with children. I also tell parents about child-centered childcare, but this concept has not yet fully taken root. Many parents wish to hold events, even if it requires extra effort. In the future, one of the main issues will be finding effective ways to communicate child-centered childcare practices to parents and elementary schools. (Public certified ECEC center)

* The parenthesis at the end of each open-ended description indicates the childcare facility type of the ECEC teachers.

Findings from the survey results

Takashi Muto
(Professor Emeritus, Shiraume Gakuen University)

The previous survey was conducted in 2018, before the COVID-19 pandemic. In contrast, this survey took place in autumn 2023, by which time the pandemic had nearly ended. Additionally, the awareness of the three "National Curriculum Standard/Guidelines," which were revised in 2017, is expected to have increased among kindergartens, daycare centers, and certified ECEC centers by the time this survey was conducted.

During this period, the birth rate has declined, while the number of dual-income families has increased. In response, the capacity fill rate of childcare facilities has decreased, particularly for children under 3 years of age. Additionally, the number of kindergartens is declining, although their operating hours are expanding. The use of ICT by ECEC teachers is rising significantly.

Parents increasingly expect childcare facilities to offer experiences that their children cannot have at home. Hence, childcare facilities are placing greater emphasis on various aspects of play and interest as key educational and childcare goals (they were asked to choose up to three, indicating the importance they place on these aspects).

On the other hand, activities outside of regular childcare, such as gymnastics, English, music, and writing *hiragana*, are also increasing.

As more childcare facilities provide longer hours, there has been a notable shift toward activities that offer wider group experiences, foster children's interests, and emphasize play. Simultaneously, there has been an increase in specialized lessons for intellectual and artistic activities at an early age. This reflects the efforts of childcare facilities to meet diverse parental needs.

Toshiyuki Shiomi
(Professor Emeritus, The University of Tokyo)

It is often claimed that the problem of childcare waiting lists has been resolved. However, this survey revealed data showing a decline in the capacity fill rates at each childcare facility, an increase in the number of children with disabilities, and a greater use of tools for indirect communication with parents. These trends indicate that the landscape of early childhood education and care is entering a new phase, and this change is not solely due to the end of the COVID-19 pandemic.

Each data from these results is quite interesting. Specifically, in the survey about improving the quality of ECEC teachers, the top-ranked factors included "Improvement in compensation for ECEC teachers," "Improvement in staffing standards," and "Promoting a culture within the facility where ECEC teachers mutually learn." These factors reflect the current conditions faced by ECEC teachers. Additionally, several ECEC teachers emphasized the need for "Enriching on-site training content" and "Securing training participation opportunities," highlighting another important aspect of their situation.

I often hear reports indicating that the number of children who seem to need special support and those who are difficult to manage is increasing. I also hear several voices claiming that parents' expectations are becoming increasingly diverse and difficult to meet. Many childcare facilities are concerned about inappropriate childcare. These situations reflect the pressing need for individuals working in childcare facilities to gain new knowledge and skills. This indicates that the need to improve the status of ECEC teachers as childcare professionals and increase opportunities to acquire specialized knowledge and skills during teacher training and post-employment training has become an enduring issue. I think the key word is improving the expertise of ECEC teachers.

Misako Aramaki
(Associate Professor, Mejiro University)

Among the newly added survey items for ECEC teachers, I will discuss the results focusing on "Opportunities for discussions at childcare facilities."

About 60% of ECEC teachers answered, "Often do so" to the question "ECEC teachers keep a record of children's activities," while 40-50% chose this answer for "ECEC teachers reflect on and review their childcare practices with each other." These results might be higher if the responses indicating "Sometimes do so" were included. By adopting a child-centered perspective while reflecting on and reviewing childcare practices, ECEC teachers will understand the current conditions and issues at their childcare facility. Ultimately, they can improve and enhance the entire childcare system. These efforts are crucial for ensuring and boosting childcare quality. In contrast, the percentage of ECEC teachers who responded "Often do so" to "Children reflect on their own activities" was relatively low. When planning and reflecting on activities at the childcare facility, it is crucial to understand "what this means for children." "Children reflect on their own activities" means accepting the thoughts and desires of children as their autonomy, enabling them to participate in activities autonomously and enthusiastically. Additionally, "ECEC teachers and parents discuss their children's behavior and progress" is important for ECEC teachers to enhance parents' understanding of children and foster a collaborative relationship that supports children's development.
By creating opportunities for casual daily interactions with parents and building a foundation of trust, ECEC teachers can also avoid troubles with parents.

In the future, it will be important to clarify the characteristics of childcare facilities that efficiently implement initiatives through the use of ICT and collaborative structures, aiming to improve childcare quality as an organization.

Asako Koyama
(Associate Professor, Wayo Women's University)

This survey revealed that many ECEC teachers have a positive view of their childcare facility's environment and recognize the importance of sharing information about children's growth and daily activities. They adopt a child-centered perspective, discuss children's conditions and childcare practices with colleagues, and consistently record children's progress. Their responses indicated that they derived satisfaction and fulfillment from their work. Consequently, it seems ECEC teachers believe their occupation to be attractive and rewarding.

However, they felt burdened by paperwork and a mismatch in salaries and workload. Regarding the "Requirements to improve the qualities of ECEC teachers," principals focus on the importance of long-term initiatives like training. In contrast, ECEC teachers seek direct and short-term outreach initiatives to alleviate their current burdens. Hence, there seems to be a gap between what principals and ECEC teachers believe as necessary for the improvement of qualities in ECEC teachers. This indicates that ECEC teachers are struggling with so much excessive workload.

The results indicate that many ECEC teachers find their work rewarding. Nonetheless, excessive workload burdens them so much just to perform their daily tasks, making it difficult to continue working as an ECEC teacher. Issues, such as improving the working conditions of ECEC teachers and labor shortages, have persisted for a long time. Simply raising salaries or increasing the staff members is not a sufficient solution to these problems.

Government-level actions are required to create an environment that encourages ECEC teachers, who find their work rewarding, to remain in the profession. I also expect ECEC teachers to continue their efforts to improve their quality as childcare professionals.

The 4th Basic Survey on Early Childhood Education and Care in Japan

Summary Version

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