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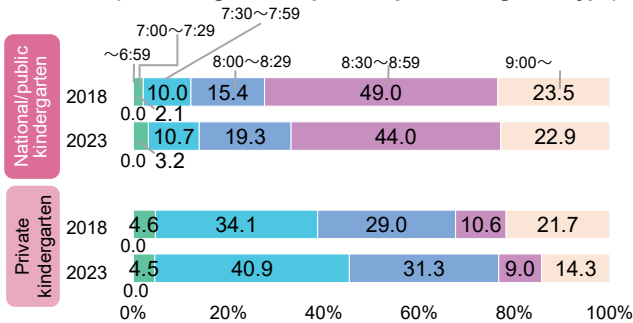
* The opening time was calculated using each facility's earliest opening time (either the opening time for standard childcare or the opening time for extended/extra childcare before the start of standard childcare).
† "No responses" and "unknown responses" were excluded from the calculation.

Figure 1-1-3 Closing time   Answered by principals
(chronological comparison per kindergarten type)
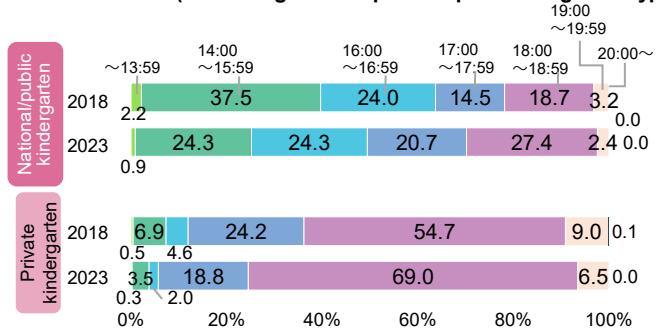
* The closing time was calculated using each facility's last closing time (either the closing time for standard childcare or the closing time for extended/extra childcare after standard childcare).
† No responses" and "unknown responses" were excluded from the calculation.

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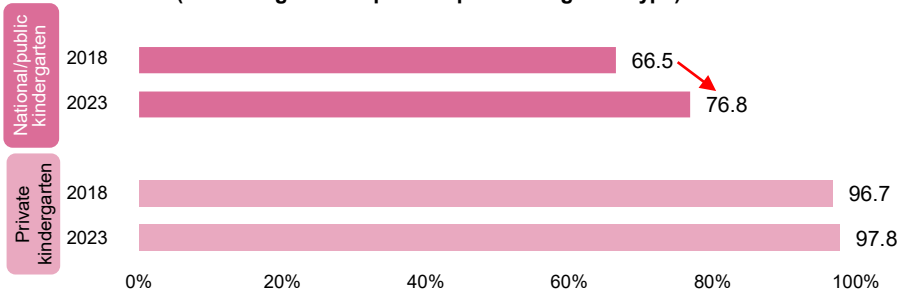
* Percentage of responses indicating "Yes, we do."

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** **Answered by principals**
**(chronological comparison for daycare centers/certified ECEC centers)**
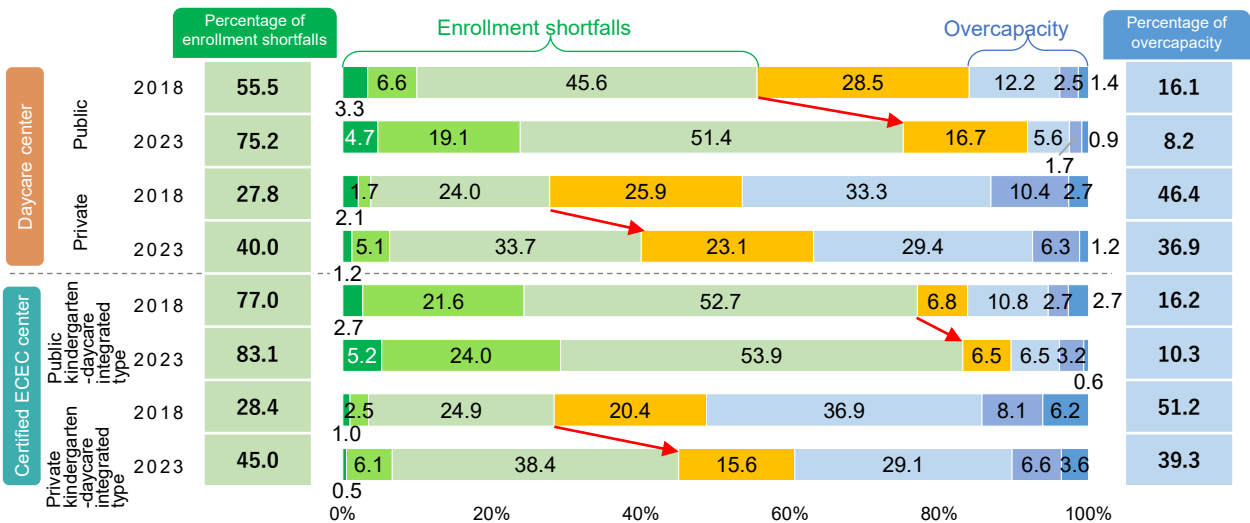
* The figures for certified ECEC centers represent the analysis results of kindergarten-daycare integrated type ECEC centers.
† Only the cases of written capacity and actual numbers in each age group were analyzed.
‡ The capacity fill rate was calculated by dividing the total number of children attending 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** **Answered by principals**
(comparison by population size for public daycare centers in 2023)
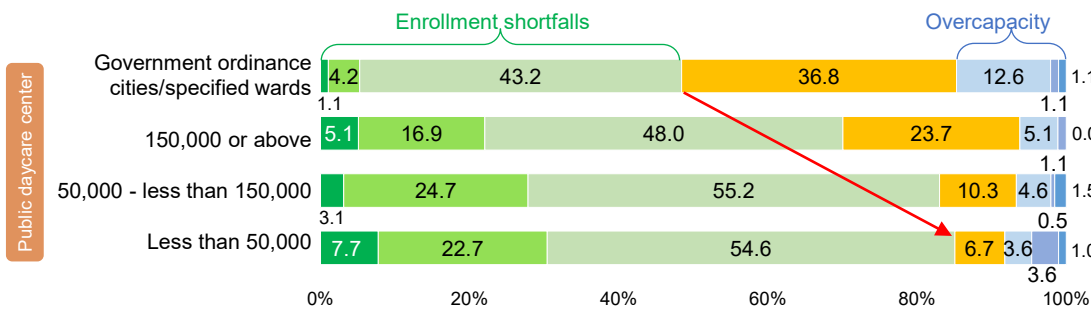
* The population size for each municipality where a childcare facility was located was classified according to the "2023 Population Estimates" published by the Statistics Bureau of the Ministry of Internal Affairs and Communications.

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]
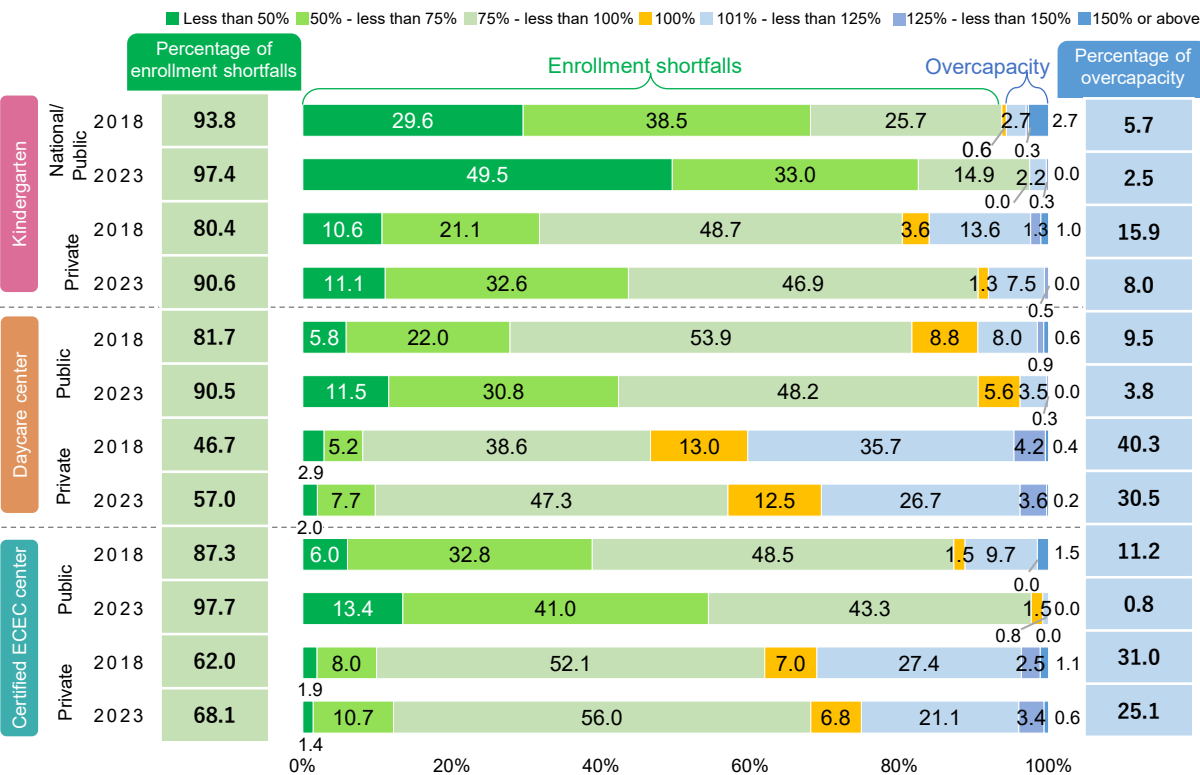
* The figures for certified ECEC centers represent the analysis results of all cases for "kindergarten type," "daycare center type," and "kindergarten-daycare integrated type."
† Only the cases of written capacity and actual numbers in each age group were analyzed.
‡ The capacity fill rate was calculated 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]
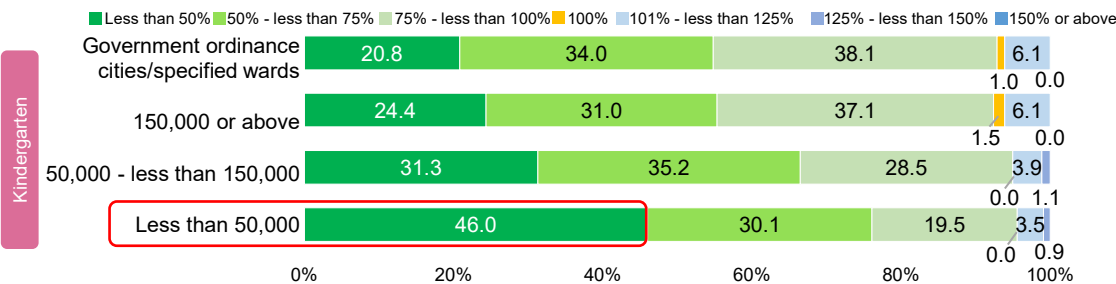
* The population size for each municipality where a childcare facility was located was classified according to the "2023 Population Estimates" published by the Statistics Bureau of the Ministry of Internal Affairs and Communications.

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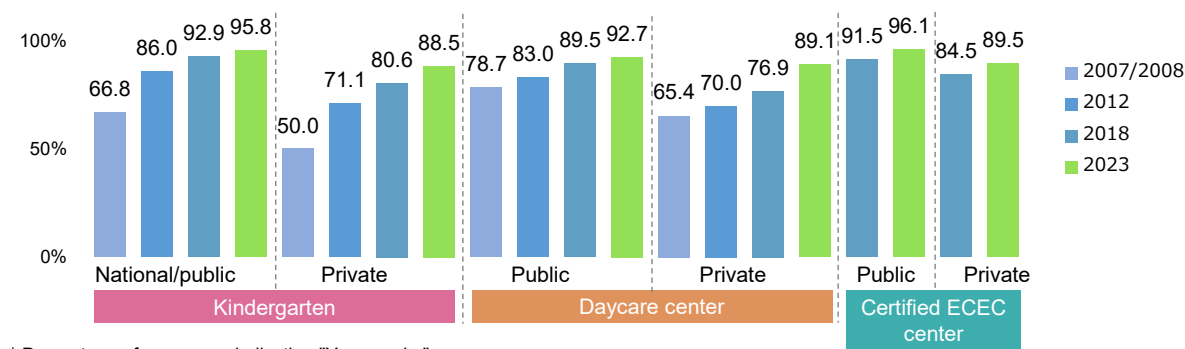
* Percentage of responses indicating "Yes, we do."

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)
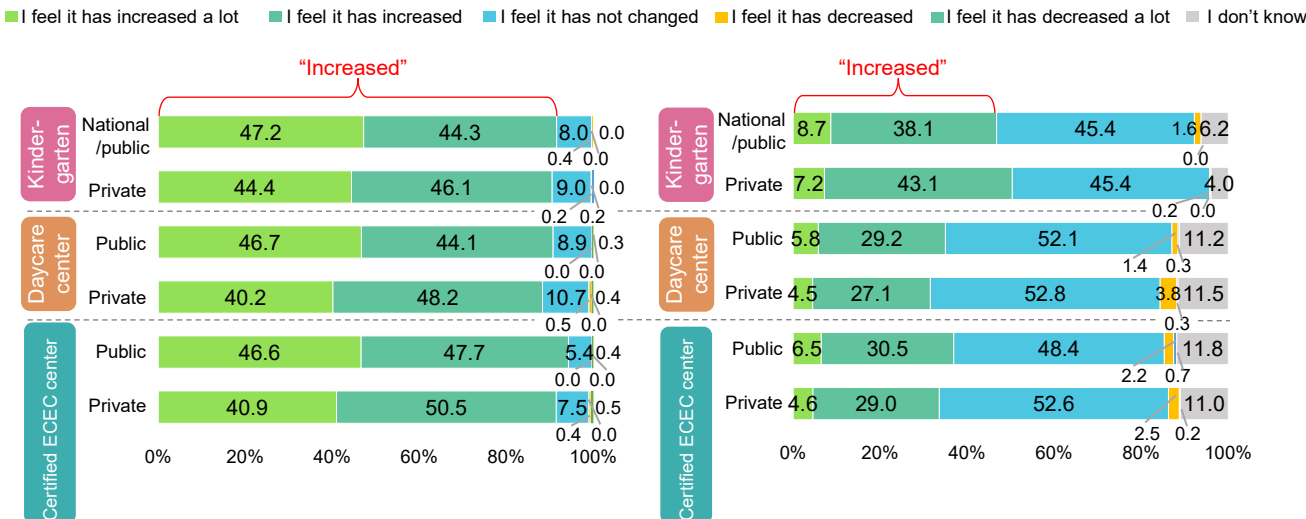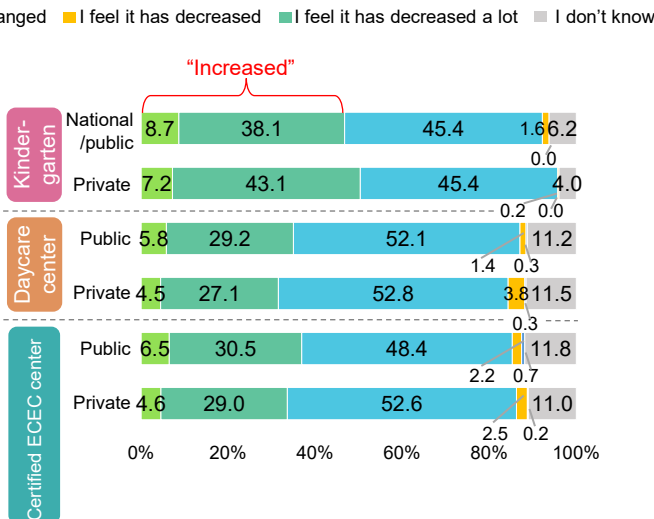
Answered by principals

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

Answered by principals

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?

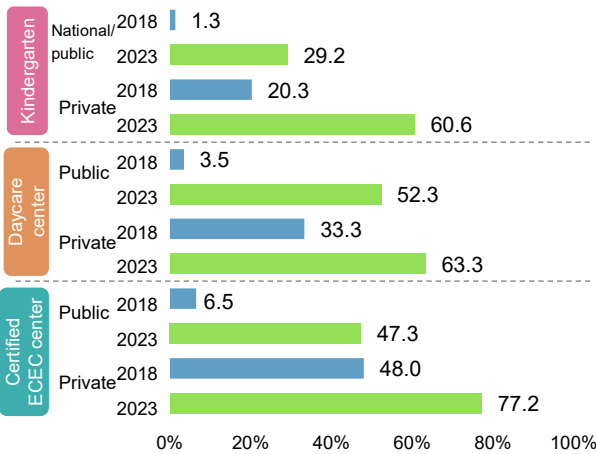**Figure 1-5-1** Use of wireless internet (Wi-Fi) (per facility type, 2023) [Answered by principals]
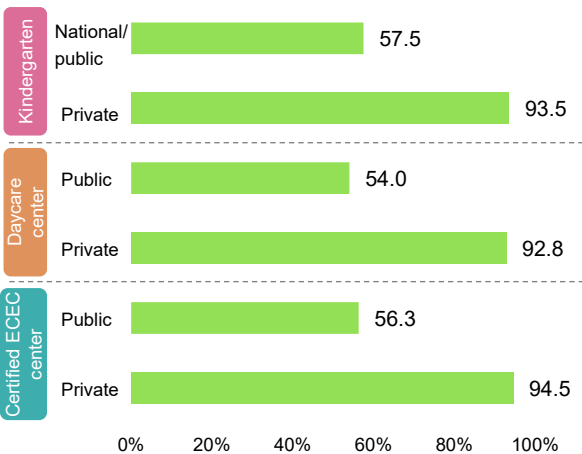
* Percentage of responses indicating "Yes, we do."
† Question items used since 2023.

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]

* 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]
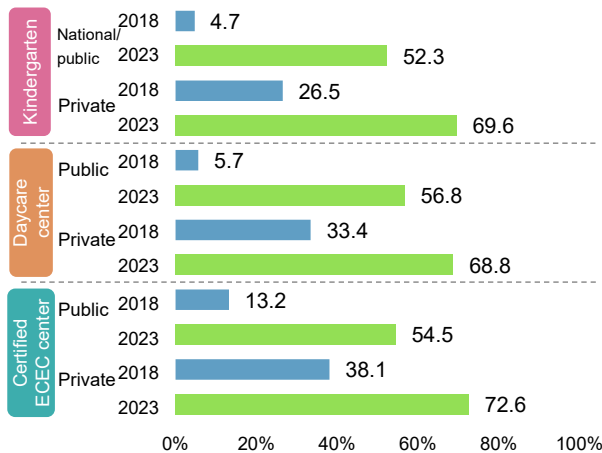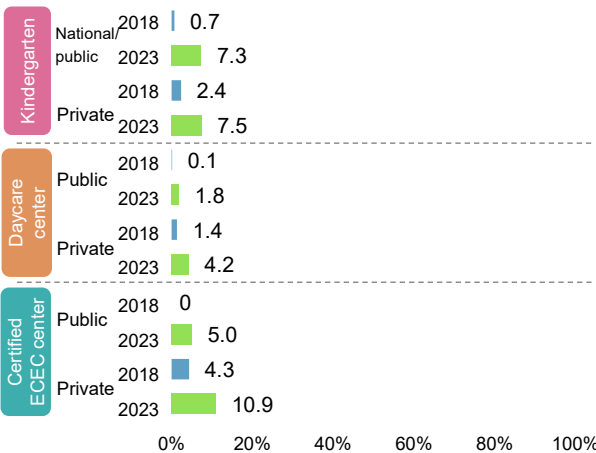

* Percentage of responses indicating "Yes, they do."
† The data on "Use of smartphones and tablets by ECEC teachers" included responses from those using only tablets, only smartphones, and both devices.

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

* 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** [Answered by principals]
(chronological comparison per facility type)
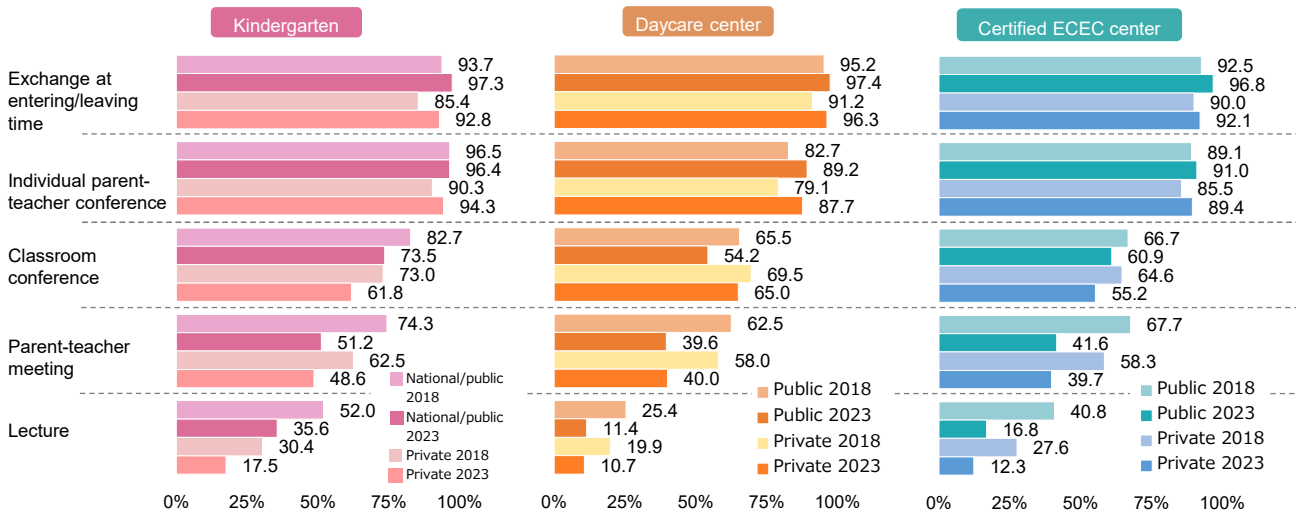
* Multiple answers.
† Among the nine categories of direct communication methods, such as face-to-face or onsite interactions (excluding "Other"), the five categories that showed significant changes since 2018 were presented above.

Figure 1-6-2 **Methods of indirect communications such as communication notebooks** [Answered by principals]
(chronological comparison per facility type)
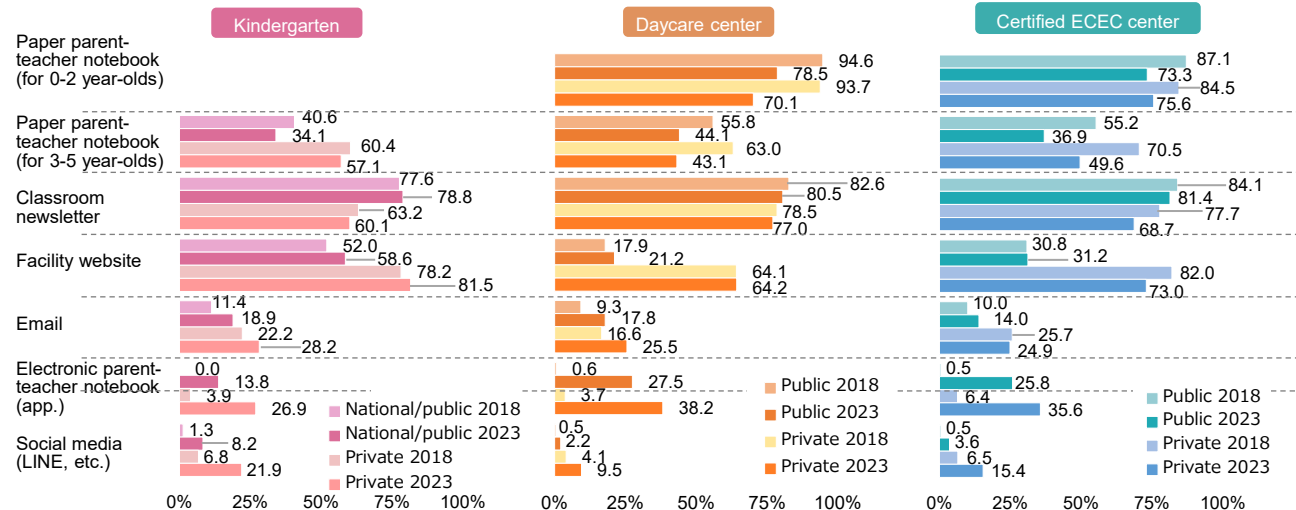
* Multiple answers.
† Among the eleven categories of indirect communication methods, such as communication notebooks (excluding "Other"), the six or seven categories that showed significant changes since 2018 were presented above.
‡ The data for kindergartens did not include the "Paper Parent-Teacher 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.**