

Report on Assessment of the Needs of Online Japanese Language Education and Learning

October, 2023

Needs Assessment Survey Study Committee
(Tokyo University of Foreign Studies, Osaka University,
University of Tsukuba, Toyo University, The Japan
Foundation, Japan Student Services Organization)

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1. Background and Purpose of the Survey

1.1 Background of the Survey

The Council for the Creation of Future Education has declared that they will accept 400,000 international students by 2033 in their J-MIRAI initiative. Specific measures are creating opportunities to study in Japan, promoting internationalization of education, and improving the retention rate of international students and highly skilled international workers. In order to execute these measures, it is urgent to take detailed actions by uniting everyone involved in Japan.

In particular, Japanese language education is an indispensable element in promoting study abroad in Japan and retaining international students. This survey was conducted not only to understand the needs of Japanese language learners and educators which have changed with the development of online education during the COVID-19 pandemic, but also to understand how Japanese language education should progress from the viewpoint of promoting study abroad in Japan. We hope that this report will help institutions and universities involved in Japanese language education and study abroad promotion to cooperate with accepting and retaining international students.

1.2 Purpose of the Survey

Tokyo University of Foreign Studies (TUFS) has been selected by the Ministry of Education, Culture, Sports, Science and Technology (MEXT) for the Japan Forum for Internationalization of Universities (JFIU) and is now working on the “Collaborative project between university overseas bases and offices through the provision of online Japanese language education”. In this project, TUFS will collaborate with several universities in Japan to apply the project achievements and share information among them. TUFS has also been assigned to be in charge of a committee specializing in Japanese language education of the Japan Virtual Campus (JV-Campus), a core project of the JFIU, and is currently creating and collecting information on online Japanese language education content.

In developing future online Japanese language education content, it is necessary to understand how such content is being publicized and utilized in Japan and other countries, and what kind of content is in demand. From this necessity, TUFS, Osaka University, University of Tsukuba, Toyo University, the Japan Foundation (JF), and the Japan Student Services Organization (JASSO) established a “Needs Assessment Survey Study Committee” to conduct a survey on online Japanese language education and learning content targeting overseas students and instructors. Understanding the actual use of online Japanese language education and learning content overseas will be a reference for considering how to connect existing content created by various Japanese language education institutions and a reference to what kind of content should be developed by each institution in the future.

The results of the survey will contribute to the development of overseas Japanese language education businesses of institutions including JFIU participants, and will also be used by JV-Campus, a core project of JFIU, to create content. If institutions across Japan can provide content in

collaboration and better meet the needs of overseas applicants for Japanese language study and Japanese language education institutions, the number of students who wish to study in Japan and to effectively utilize the content is expected to increase.

2. Survey Summary

This survey was conducted on the premise that especially students related to studying abroad at universities and graduate schools were the main focus among the diverse scenes of Japanese language education. First, an online questionnaire using Google Forms was conducted from August 18th to September 30th of 2023. Respondents included 90 instructors in charge of Japanese language education at overseas institutions of higher education (“overseas Japanese language instructors”), 341 students affiliated with overseas institutions of higher education (“overseas students”), and 109 students studying at Japanese institutions of higher education (“international students”). Some questions were common and others were different depending on the targeted group of people. Please refer to Appendix 1 (“Survey Questions (Google Forms)”) for specific questions.

The questionnaire and the interview survey were conducted at the same time. The targets were (1) 13 domestic institutions and overseas offices of the Japan Foundation (JF) and the Japan Student Services Organization (JASSO), (2) 7 overseas higher education institutions where Tokyo University of Foreign Studies (TUFS) has Global Japan Offices and Desks as a base for Japanese language education overseas, and (3) representatives from the TUFS Japanese Language Center for International Students. Interviews were about the use of online learning materials and tools for Japanese language education and learning, as well as requests from students who want to study in Japan. Please refer to Appendix 2 for the main interview questions (“Interview Survey Questionnaire”). Interviews were conducted in person or online from July to September 2023. A questionnaire was sent to the target groups in advance, and one hour semi-structured interviews were conducted. The results of the interviews from July were also used as materials for selecting the survey questions.

The targeted institutions for the interview survey were selected from regions where the importance of the regional strategies (prioritized countries) were mentioned in the “Summary of Strategic Promotion of International Student Exchange,”¹ announced by the Ministry of Education, Culture, Sports, Science and Technology (MEXT) in May 2023. Referring to the information on JF's website and the “Survey Report on Japanese-Language Education Abroad 2021” issued by JF, we coordinated with each institution, taking into consideration each

¹ “Summary of Strategic Promotion of International Student Exchange,” announced by the Ministry of Education, Culture, Sports, Science and Technology (“MEXT”) in May, 2023.

https://www.mext.go.jp/a_menu/koutou/ryugaku/1405546_00005.htm

institution's business, the use and diffusion of online Japanese language education and learning materials in each country, and regional balances. The same criteria were used for the online survey.

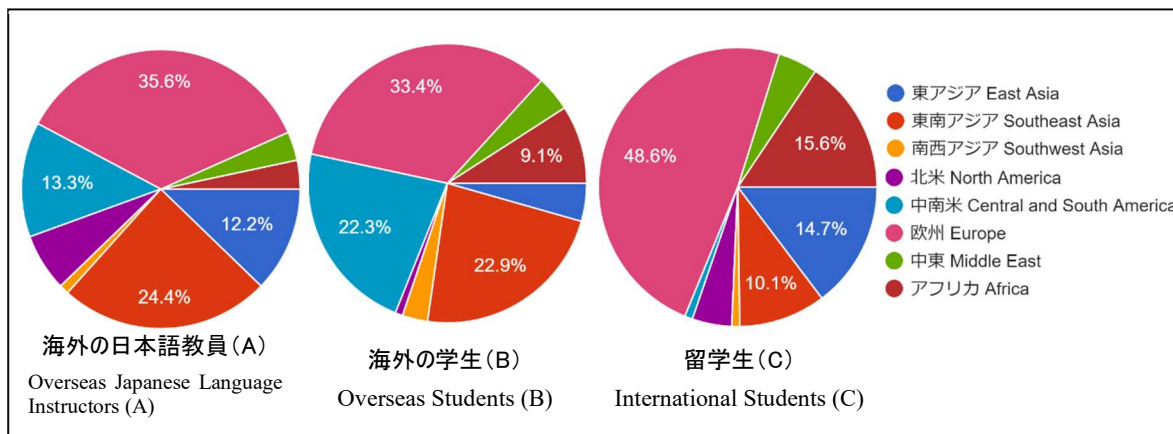
As a result, the most common locations where the institutions of the respondents were located (or where the home universities of international students were located) were in Europe. For overseas Japanese language instructors (A), the most responses were from Europe (35.6%), followed by Southeast Asia (24.4%), Central and South America (13.3%), and East Asia (12.2%). As for overseas students (B), the most responses were from Europe (33.4%), followed by Central and South America and Africa, which were both more than 20%, and Southeast Asia (9.1%). We were able to receive a wide range of responses from the prioritized countries which send international students. For international students (C), the majority were from Europe (48.6%), followed by Southeast Asia (15.6%) and East Asia (14.7%). There were no responses from Oceania for either (A), (B) or (C).

Regarding the current Japanese language levels of overseas students (B) and international students (C), the majority of overseas students (B) selected “elementary” and “pre-intermediate” levels, while the highest percentage of international students (C) selected the “upper-intermediate” level at 29.4%. Looking at the respondents’ Japanese language levels by region, many overseas students (B) from Europe and Central/South America, where the number of respondents was large, selected the “elementary” level. Southeast Asia also had students who selected the “elementary” level, but there wasn’t much difference from the number of respondents who selected the “pre-intermediate” or “intermediate” levels. When only looking at the number of respondents, the “intermediate” level is mostly dominated by students from Europe and Southeast Asia. On the other hand, for international students (C), “intermediate” and “upper-intermediate” levels were particularly common among European students, the “elementary” level among African students, and the “advanced” level among East Asian students.

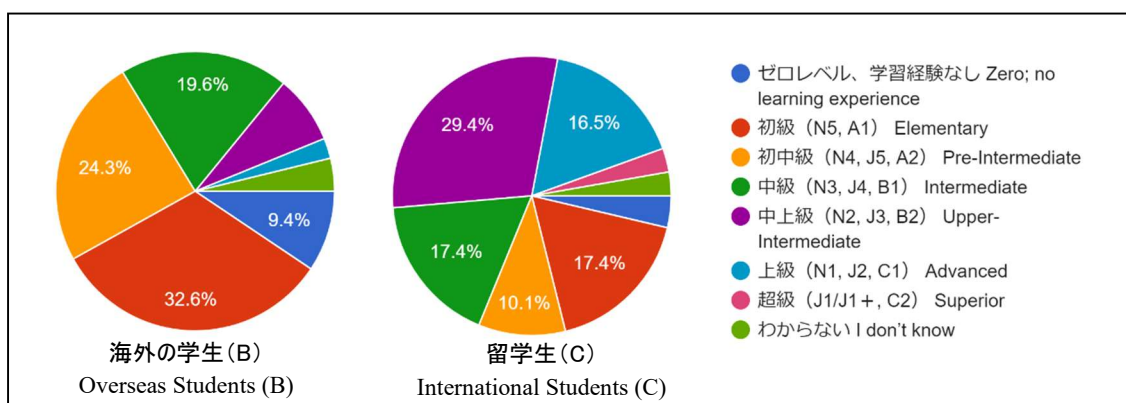
Regarding the length of study abroad, overseas students (B) were asked to answer their desired study abroad length. The most popular response for both overseas students (B) and international students (C) was “up to 1 year.” For international students (C), about 30% of the respondents also answered “up to 6 months.”

Looking at the respondents’ (desired) length of study abroad by region, for overseas students (B), 66.7% of North American students selected “up to 1 year” and 33.3% selected “up to 6 months,” indicating that many students wish to study abroad for a short period. Only students from Southeast Asia accounted for more than half the responses with “more than 2 years.” On the other hand, a relatively large percentage of international students (C) in North America and Southeast Asia selected “up to 6 months,” while 36.4% of students in Southeast Asia also selected “longer than 2 years.” For Europe and the Middle East, the most popular answer was “up to 1 year.”

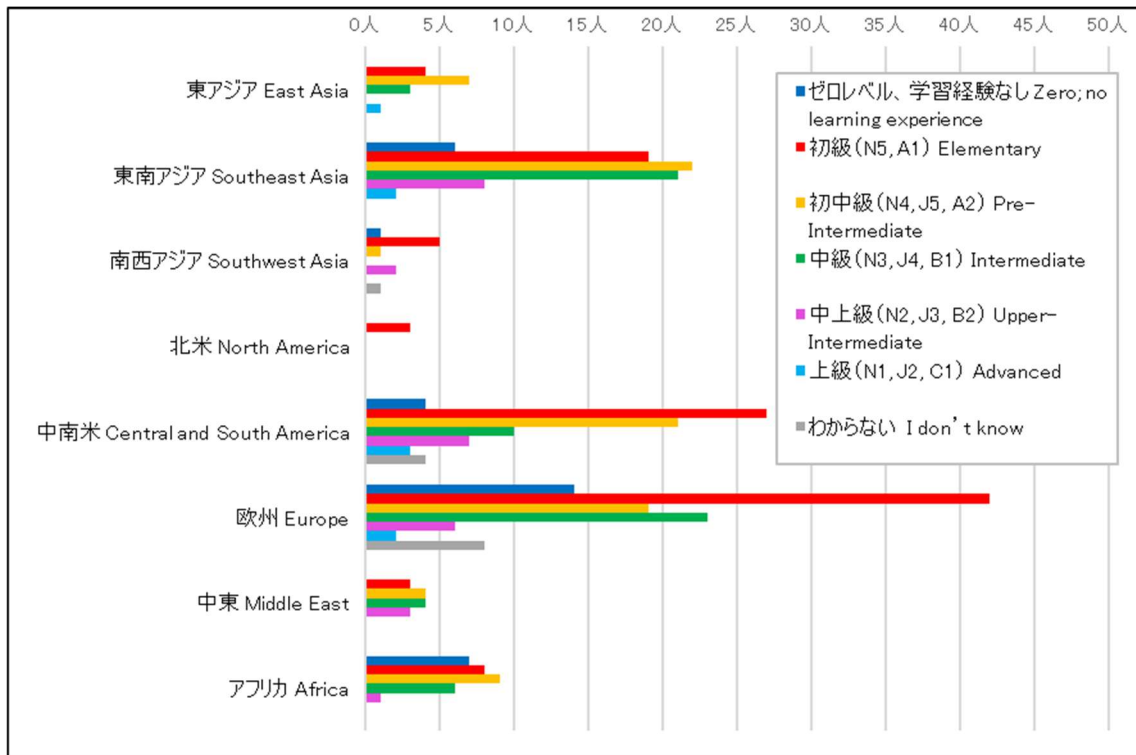
Since the survey is only targeted to students who are currently enrolled in foreign universities, it is inferred that not many students wish to go for a long-term study abroad such as becoming undergraduate students.



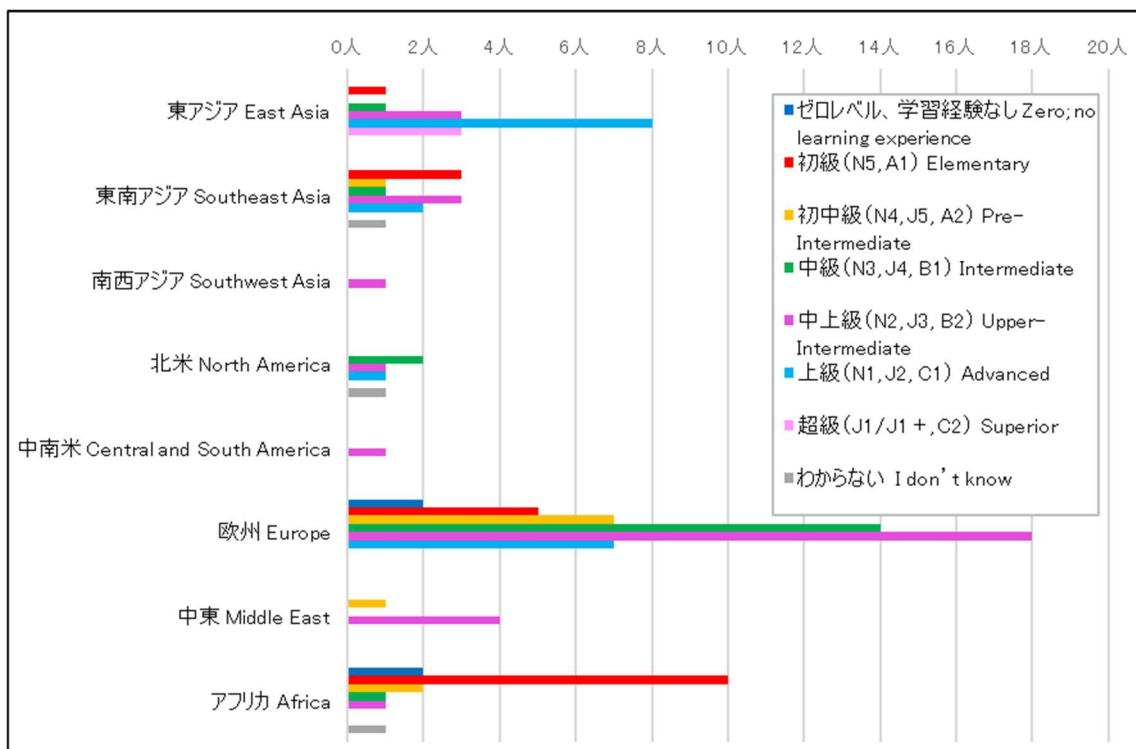
[Chart 2-1 : Location of survey respondents' institutions]



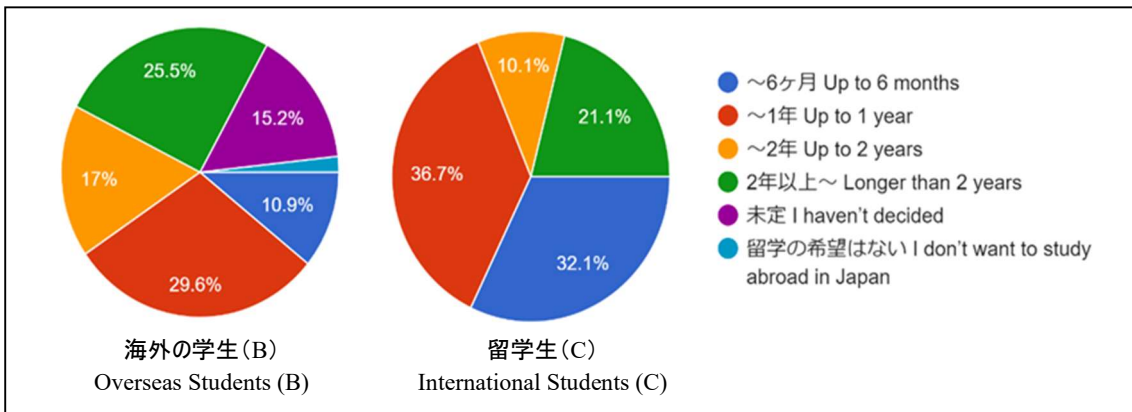
[Chart 2-2 : Japanese level of survey respondents (students)]



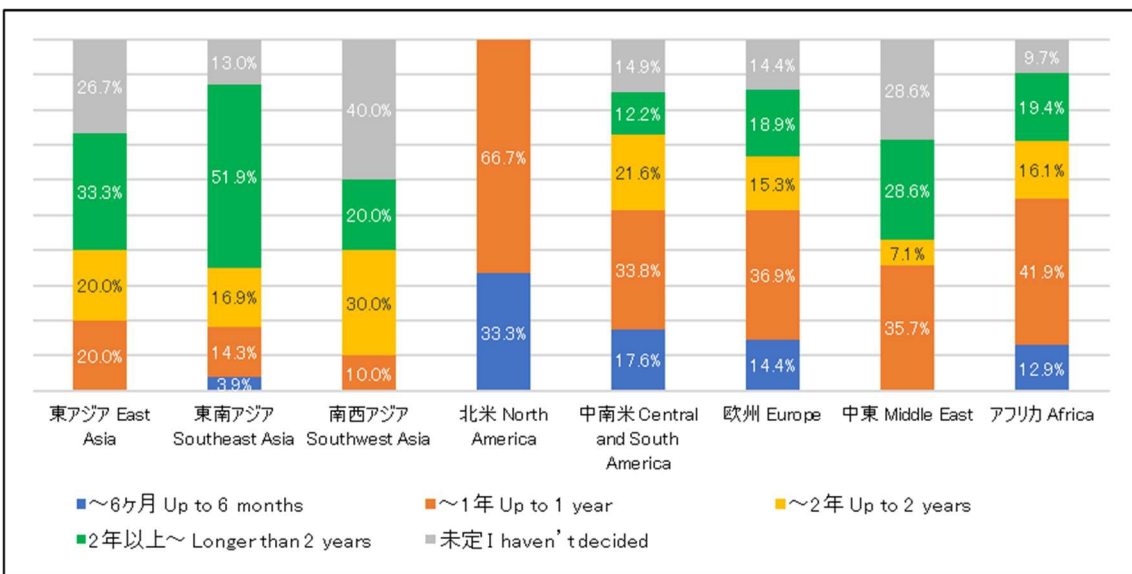
[Chart 2-3 : Number of survey respondents by region, Overseas Students (B)]



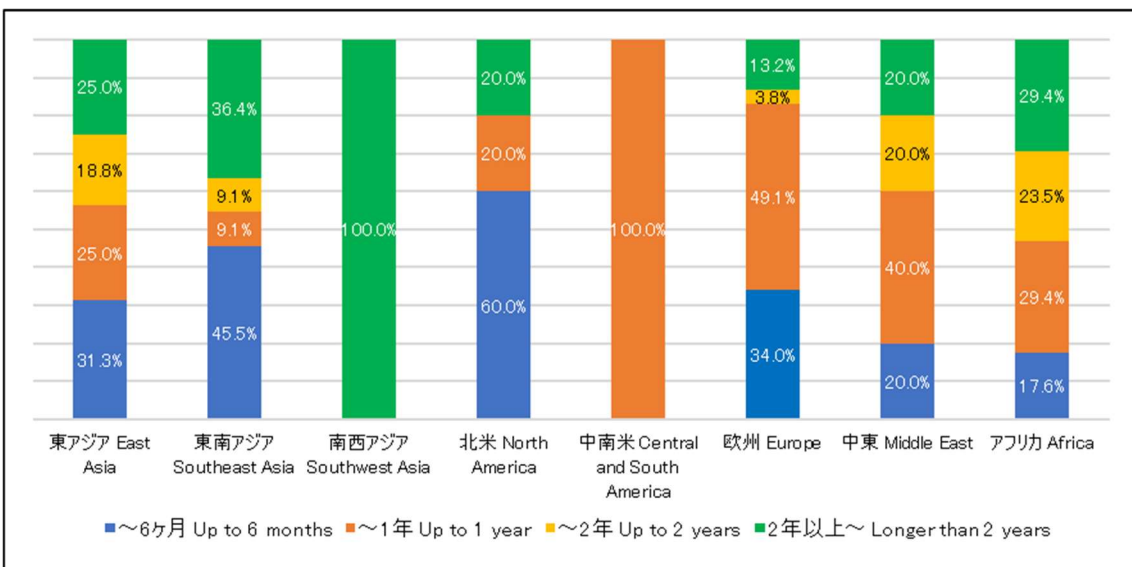
[Chart 2-4 : Number of survey respondents by region, International students (C)]



[Chart 2-5 : Length of study abroad (Desired length for overseas students)]



[Chart 2-6 : Desired length of study abroad by region, Overseas Students (B)]



[Chart 2-7 : Desired length of study abroad by region, International Students (C)]

3. Needs and Challenges in Studying in Japan

3.1 Needs for Studying in Japan

When we asked the purpose of studying abroad in Japan (multiple answers allowed), the most popular answers for both overseas Japanese language instructors (A) and overseas students (B) were “developing Japanese language skills” which account for 70-80% of the answers. This was followed by “to experience life abroad and cross-cultural exchange,” “interested in Japanese culture, including history, literature, and art,” and “interested in Japanese culture such as anime, manga, J-POP, fashion, etc.” which are in order by popularity and account for 60% of the answers.

For international students (C), “to experience life abroad and cross-cultural exchange,” was the most popular answer with 74.3% (81 students) and was slightly above “developing Japanese language skills” which was 72.5% (79 students). Followed by “interested in Japanese culture, including history, literature, and art” and “interested in Japanese culture such as anime, manga, J-POP, fashion, etc.” which were also popular answers.

JF’s “Survey Report on Japanese-Language Education Abroad” has always conducted studies on the purpose of Japanese language education. According to the results from the 2021 survey, the popular answers follow as: “interest in the Japanese language itself” (60.1%), “interest in anime, manga, J-POP, fashion,” (50.9%), and “interest in history, literature, art,” (47.9%). In order to understand the purpose of studying in Japan, we added new response categories such as “developing Japanese language skills,” “to experience life abroad and cross-cultural exchange,” “to conduct specialized study and research that can only be done in Japan,” and “to study and research in areas that are particularly advanced in Japan,” in addition to the cultural aspect. JF’s survey also includes other categories such as “international understanding, international friendship activities, and cross-cultural exchange,” which is similar to “to experience life abroad and cross-cultural exchange,” but fewer respondents (24%) chose this as their answer compared to other options. On the other hand, having 60% of the respondents choosing “to experience life abroad and cross-cultural exchange” shows that students who have specific purposes for study abroad tend to differ from general learners in such a way that many of them find value in the study abroad experience itself.

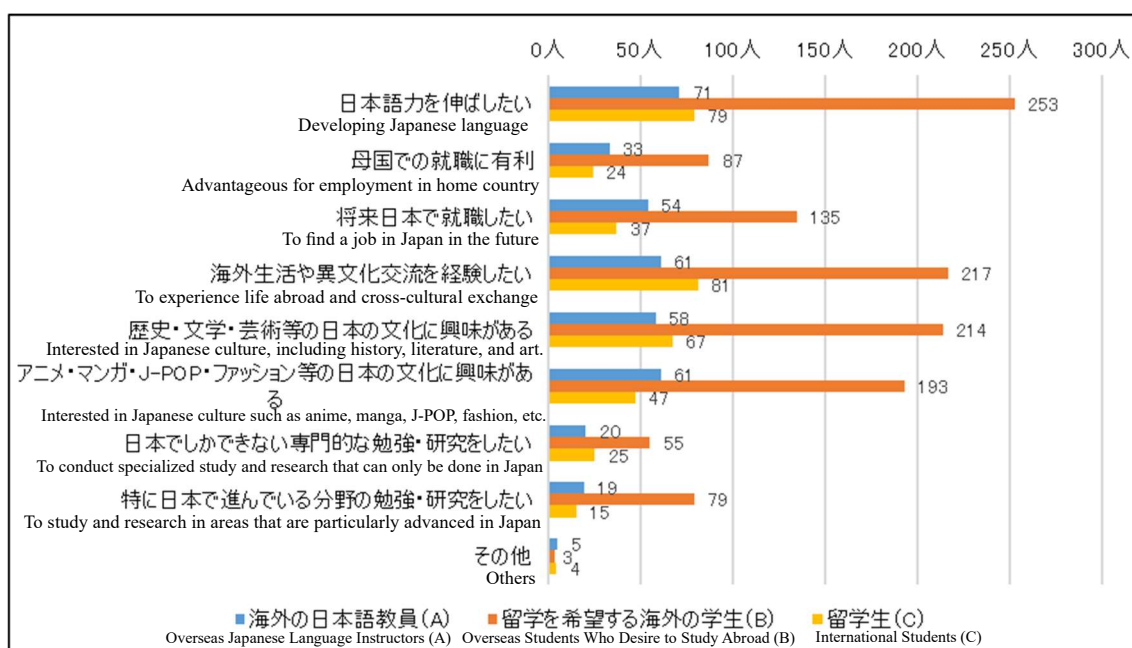
The percentage of those who selected “to find a job in Japan in the future” was 60% (54 instructors) for overseas Japanese language instructors (A), while that of overseas students (B) was 39.6% (135 students) and 33.9% (37 students) for international students (C).

Furthermore, the percentages of those who selected “to conduct specialized study and research that can only be done in Japan,” and “to study and research in areas that are particularly advanced in Japan,” were in the lower 10~20% for both overseas Japanese language instructors (A) and students (B and C). Having a large number of respondents from Europe and a small number of respondents from Asia, this resulted in having less respondents who selected “to conduct

specialized study and research that can only be done in Japan,” and “to study and research in areas that are particularly advanced in Japan.”

According to interviews with coordinators of overseas higher education institutions where TUFs Global Japan Offices and Global Japan Desks are based, no matter where the students are from, students studying Japanese at universities are generally highly motivated to study in Japan. Also, in accordance with the survey results, many of them want to study in Japan because they want to improve their Japanese language skills, because of their interest in Japanese culture, and because they want to experience different cultures. Since many university students are studying Japanese with a specific purpose in mind, interest in pursuing higher education in Japan and, especially in Asian countries, interest in pursuing a career in Japan can also be seen.

Furthermore, according to JASSO's interviews with pre-college students, the students' majors are diverse for those who want to become undergraduate students, regardless of their background in humanities or sciences. Many wish to study abroad to acquire a high level of specialized knowledge and hope to pursue a career in Japan in the future.



[Chart 3-1 : Purposes of study abroad (Multiple answers allowed)]

3.2 Information and Support Required by Prospective International Students

Overseas students were asked about information they want now, and international students were asked about the things they wish they had known before coming to Japan. In addition, JASSO's domestic institutions were asked about questions which were frequently asked by students at overseas study abroad fairs and domestic university information sessions.

In general, overseas students are looking to improve their overall Japanese language skills. Details of the content students want to learn are discussed below in Chapter 5, but in particular, they are seeking information on efficient ways to learn kanji and vocabulary, educational materials, and online courses. Other topics of interest include scholarship programs and expenses associated with studying abroad. There was also interest in career information, such as the employment situation for foreigners, internship information, and JLPT levels required to find jobs in Japan. Unique to foreign countries, some students desire to obtain access to books published in Japan and to make Japanese friends online in order to have opportunities to speak Japanese. Although it is a minority opinion, some students seek information on terminologies and how to write papers when studying and researching at the university. In addition, many prospective graduate students want to know how to approach academic advisors.

Many of the international students' opinions are based on their experiences in Japan. References to kanji were particularly noticeable and some students commented, "I didn't realize how necessary kanji is in daily life," and "I should have studied more kanji before coming to Japan to study." There are also many specific examples from their daily life. These include: everyday conversational expressions used at convenience stores, restaurants, and hospitals, names of vegetables and fish found in supermarkets, information on Japan's climate (summer heat), how to make payments at online stores, how long it takes to open a bank account, and Japanese vocabulary that is used when looking for accommodation. In addition to these examples, some commented that they wished they had learned about Japanese manners not covered in general learning materials, that there are different types of Japanese depending on who you speak with and the situation, how to ask for support when in trouble, and that people in Japan may speak less English than you imagine. It is also worth mentioning that the students wanted mental support to gain confidence, as they were very anxious in the early stages of their study abroad.

3.3 Challenges in Japanese Language Education in Japan and Abroad

3.3.1 Challenges Related to Students Who Seek to Study Abroad as Undergraduate Students

According to interviews with JASSO overseas offices and domestic preparatory education institutions, concerns on the difficulties of the Examination for Japanese University Admission for International Students (EJU) for university admission are very high.

Many overseas students have vague feelings of anxiety about learning Japanese quickly in order to enter university, but have no idea how long it will take them to reach that level. Also, students, especially from countries that do not use kanji are experiencing great difficulties in learning kanji characters and in reading comprehension questions. Not only learning the Japanese language, but also learning basic subjects is a hurdle. The scope of study that is covered in the secondary education curriculum differs from country to country, and the gap between Japan and other

countries needs to be filled. It is extremely hard on the students to learn basic subjects in their desired field in Japanese in addition to mastering the Japanese language within the preparatory education period after arriving in Japan. It is quite difficult for students to prepare for the EJU before coming to Japan since many of them have little knowledge of the EJU exam itself and there are not enough EJU preparation materials and online content.

Many students also face difficulties in the actual application procedures. The Japanese language of the application guidelines is difficult to understand, and the content differs from university to university, making it extremely time-consuming to instruct students on how to prepare for the application process.

Furthermore, regarding the preparation of research plans required for graduate school entrance examinations, the fact that there are learning materials prepared by JASSO and that samples are available online are not yet well known to overseas students.

Regarding international students enrolled in preparatory courses, educators mentioned the need not only for instruction in Japanese language and basic subjects, but also for psychological care, including lifestyle guidance.

In addition to the above, it is necessary as a premise to increase the number of undergraduate international students, by providing information in a form that is easy for students to understand and access about the advantages of studying in Japan, what kind of study they can do at Japanese universities, and how much Japanese they need to learn in order to study in Japan.

3.3.2 Challenges in Japanese Language Learning for Overseas University Students

Overseas Japanese language instructors were asked what difficulties they face when their students learn Japanese. Many faculty members cited the lack of a suitable environment to apply the knowledge learned in Japanese classes and the lack of opportunities to interact with Japanese people outside of school. Related to this, many answered that it is difficult to improve their speaking and listening comprehension skills. Many also commented that learning kanji characters is very difficult. In terms of the learning environment, several instructors mentioned the lack of learning materials and the fact that learning materials are expensive and difficult to obtain. All of these challenges are unique to foreign countries.

4. Online Learning Overseas

4.1 Current Status of Online Learning Overseas

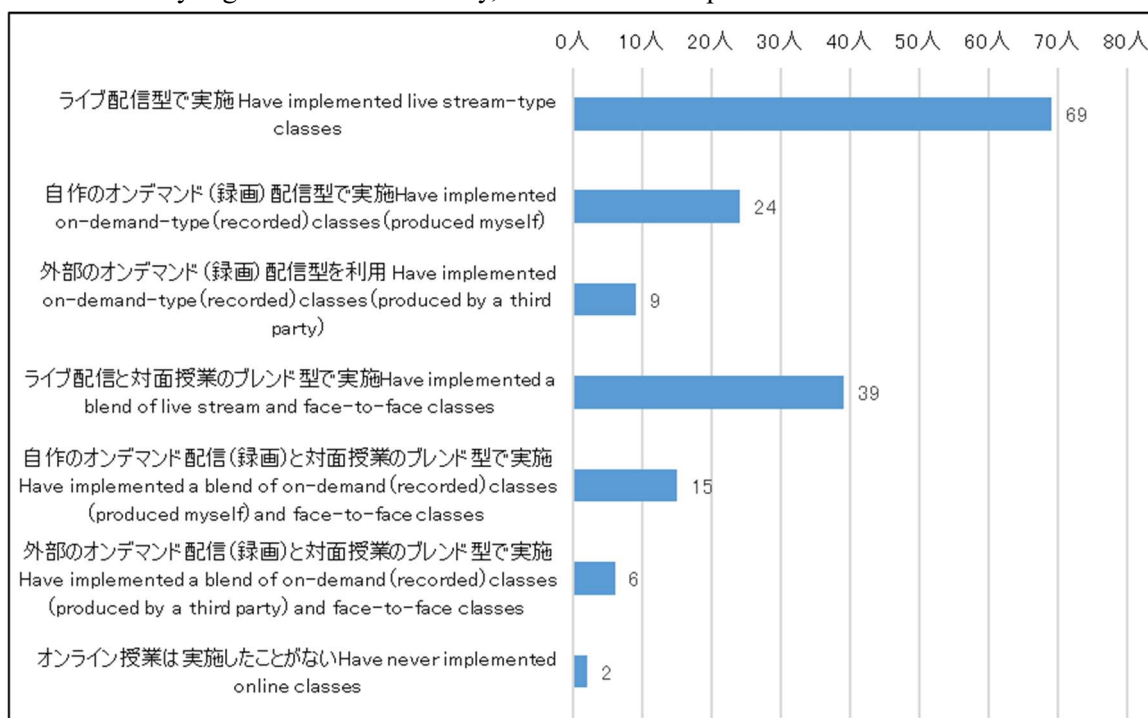
4.1.1 Status of Online Classes at Overseas Institutions of Higher Education

When overseas Japanese language instructors (A) were asked whether or not they offer online Japanese language classes, only two (2.2%) responded that they had not done so yet which indicates that most of them have some experience in offering online classes at their institutions.

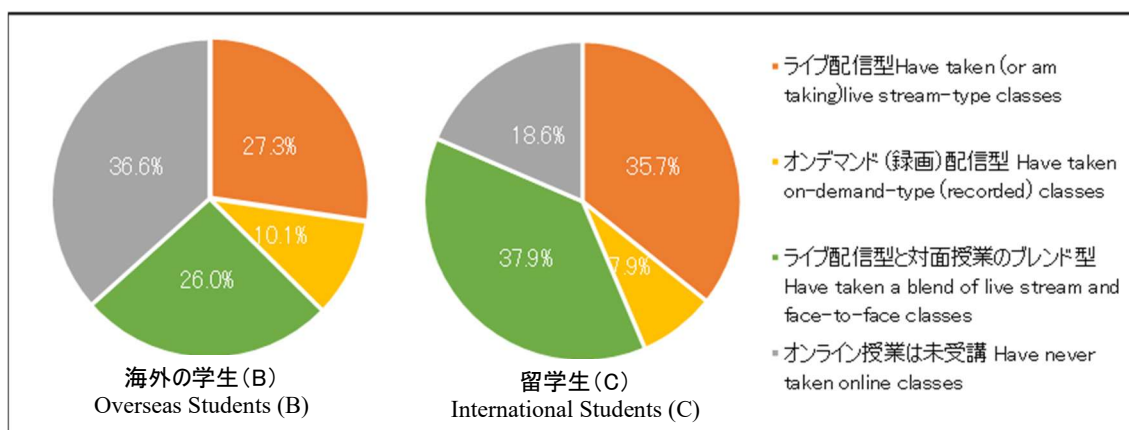
JF’s 2021 “Survey Report on Japanese-Language Education Abroad” reported that 63.1% of all institutions have implemented online classes before, and by educational level, higher education has the highest implementation rate at 78.7%. The survey results show that the implementation rate is even higher this time. According to interviews with overseas higher education institutions and JF overseas offices, the online learning style is now common and learners seem to have become less resistant to this learning style due to the rapid progress of online learning during the COVID-19 pandemic.

Next, regarding the experience of overseas students (B) and international students (C) in taking online Japanese language classes, the largest percentage of overseas students (B) was 36.6% (142 students) which answered, they “have never implemented online classes”. For international students (C), “live stream-type” and “blended type (a blend of live stream and face-to-face classes)” were both just under 40% of the total. Looking at the percentage of students who have not yet taken online classes by region and by order of popularity, North America, Europe, Central/South America, and Africa, have higher percentages than Asian students.

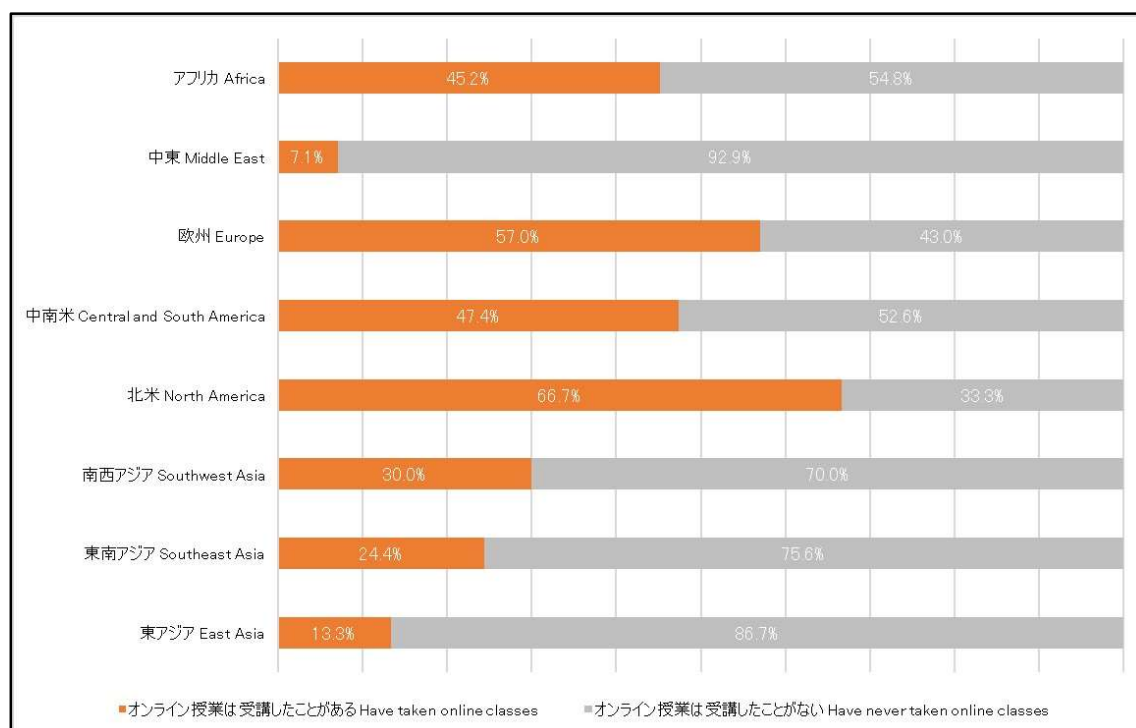
When looking at the breakdown of overseas students (B) who did not take online classes (142 students in total), there were: 14 from Africa, 65 from Europe, 2 from the Middle East, 36 from Central and South America, 2 from East Asia, 20 from Southeast Asia, 3 from Southwest Asia, and 2 from North America. It is believed that this may largely depend on the Internet environment of each country/region or each university, as well as on the policies of the universities.



[Chart 4-1 : Japanese language online class, Overseas Japanese Language Instructors (A) (Multiple answers allowed)]



[Chart 4-2: Students' experience of taking Japanese online classes, Students (Multiple answers allowed)]



[Chart 4-3 : Percentage of students who have not taken online Japanese language classes by region, Students]

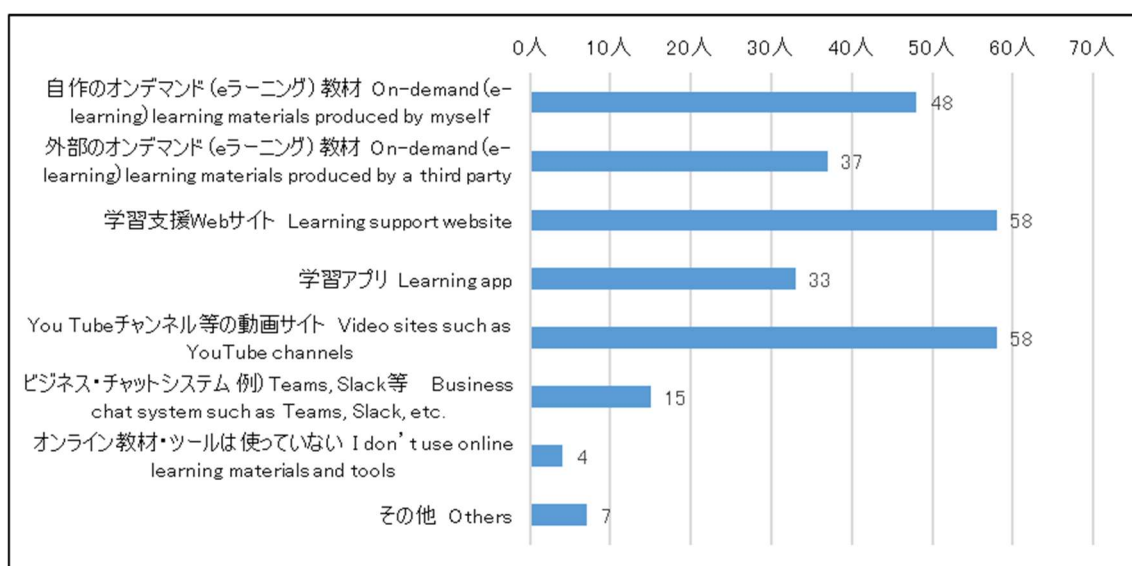
4.1.2 Usage of Online Learning Materials and Tools in Foreign Higher Education Institutions

When overseas Japanese language instructors were asked about online learning materials and tools that they use in classes, “learning support websites” and “video sites such as YouTube channels” were the most common, which were both at 58 respondents (64.4%). Many instructors also use other learning materials and tools. It is evident that a variety of online learning materials and tools are being used in Japanese language classes at overseas institutions of higher education. According to the interviews, higher education institutions often use reliable learning materials such as NHK for school and JF’s materials. They also introduce game-like apps such as Quizlet

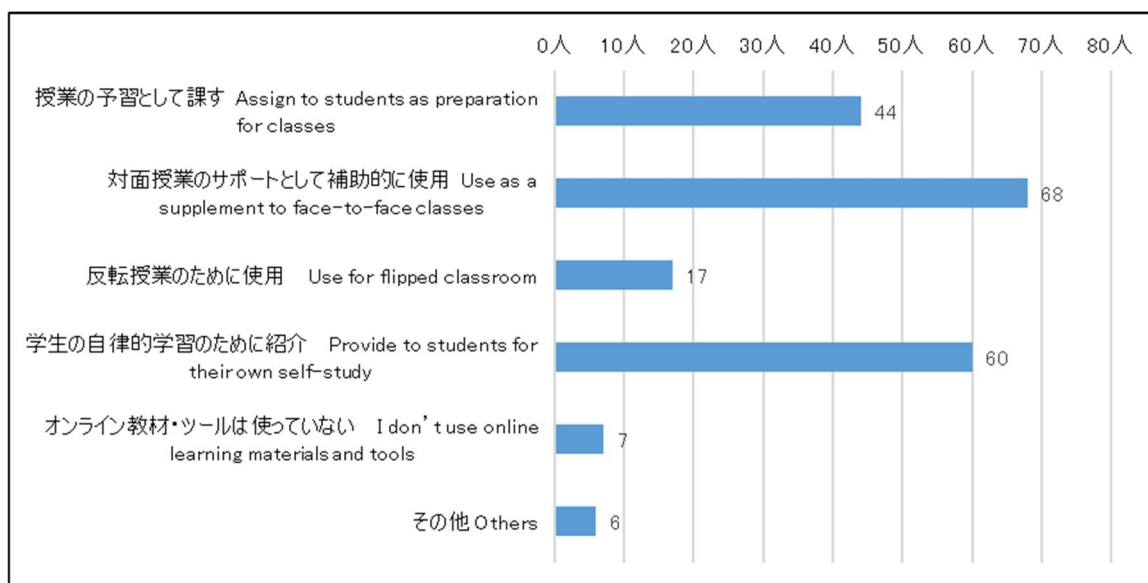
and Kahoot! for review and practice, or create their own podcasts.

The most common purpose of using Japanese online learning materials and tools was “use as a supplement to face-to-face classes” which had 68 respondents (75.6%), followed by “provide to students for their own self-study” at 60 respondents (66.7%), and “assign to students as preparation for classes” at 44 respondents (48.9%).

According to interviews with overseas institutions of higher education, there are cases where students are required to use online learning materials and tools not only in classes, but also in “flipped classrooms” or at home as a way to prepare for and to review lessons. It can be confirmed that teachers are using online materials and tools for a variety of purposes in Japanese language education overseas.



[Chart 4-4 : Online learning materials and tools used in classes, Overseas Japanese Language Instructors (A) (Multiple answers allowed)]



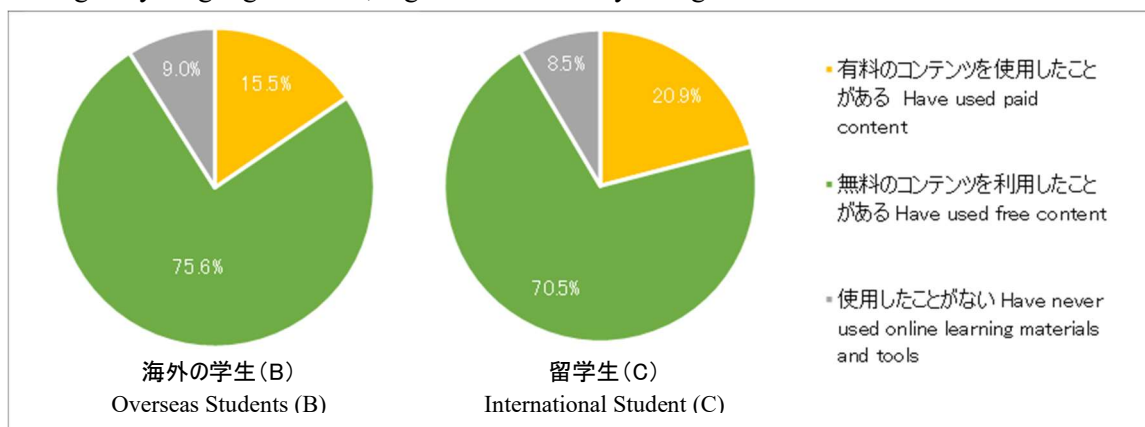
[Chart 4-5 : Purpose of using online learning materials and tools,

Overseas Japanese Language Instructors (A) (Multiple answers allowed)]

4.1.3 Students' Experience with Online Materials and Tools

Students were asked about their experiences in using online learning materials and tools, such as online content and apps for studying Japanese on their own. Those who “have used free content” accounted for 75.6% (303 students) of overseas students (B) and 70.5% (91 students) of international students (C), both exceeding 70%. The number of students who used paid content is not very high, which was around 20% for both overseas students (B) and international students (C).

In addition, although educational institutions have not been able to confirm this, many learners appear to be using apps to conduct their own independent self-study. In particular, many use websites or apps for dictionaries, and the free learning app “Duolingo” was mentioned regardless of country or region. Many students also use YouTube videos for grammar study and other purposes. In some regions, videos created not only by Japanese people but also by local YouTubers are influential. According to overseas instructors, the number of people who prefer to understand the content by watching videos rather than reading texts is increasing, especially among the younger generation, regardless of country or region.



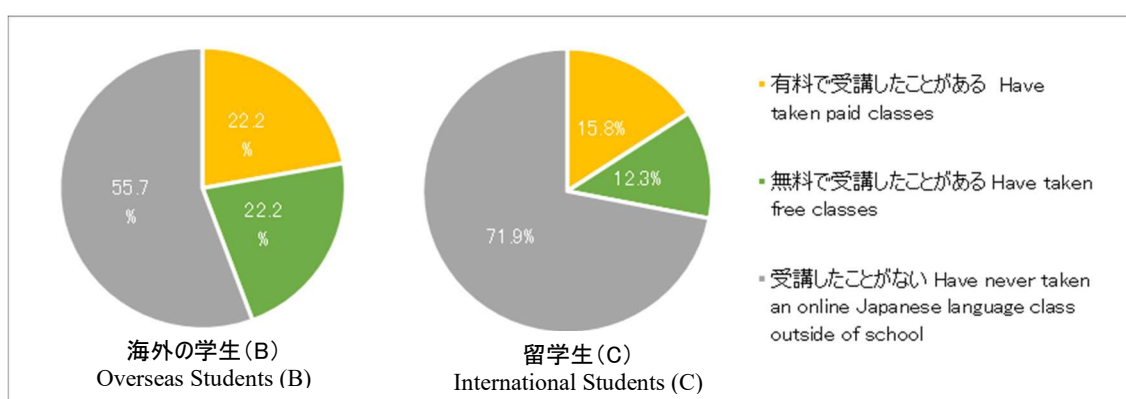
[Chart 4-6 : Students' experiences with online materials and tools, Students (Multiple Answers allowed)]

4.1.4 Students' Experiences of Taking Online Classes (outside of university classes)

When students were asked if they have ever taken online Japanese language classes outside of university classes (live lessons, online courses with teacher support, etc.), 55.7% (206 students) of overseas students (B) and 71.9% (82 students) of international students (C) answered that they “have never taken an online Japanese language class outside of school”. The percentage of students who had taken online courses were slightly higher for overseas students (B), at 22.2% (82 students) for both paid and free courses.

As noted above, the use of online materials and tools is active both in Japan and abroad, but even if it were free of charge, taking online classes outside of university classes is not yet a common thing to do.

Students who have taken online classes were also asked to answer in the open-ended question about what type of classes they had taken. The type of classes that the students attended was about the same number for both group and individual lessons. Some students took JF’s “Marugoto Japanese Online Course” and courses offered by Japanese universities and language schools in Japan and abroad. The content of study is diverse, ranging from writing, conversation, grammar, culture, and preparation for the JLPT.



[Chart 4-7 : Experiences in taking online classes (external classes) Students (Multiple Answers allowed)]

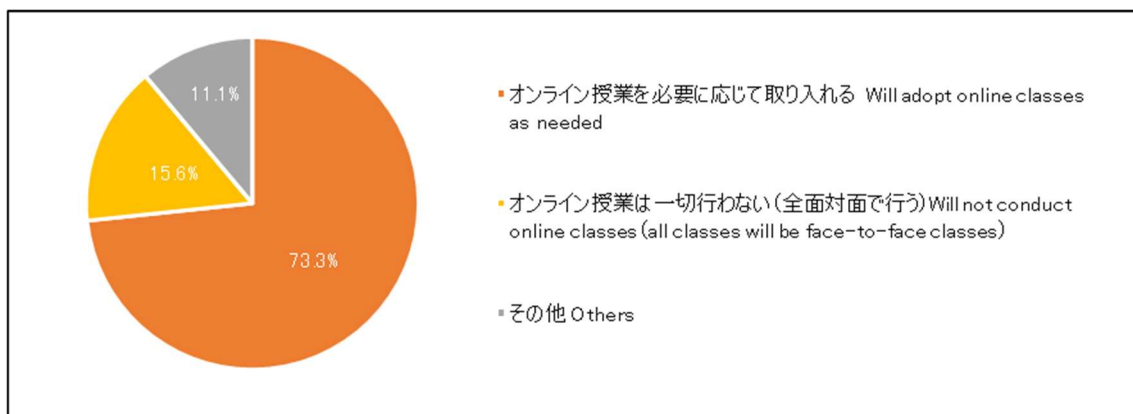
4.2 The Future of Online Classes Overseas

4.2.1 Policies of Foreign Higher Education Institutions on Online Classes

As the COVID-19 pandemic has settled down, we asked overseas Japanese language instructors about their plans and policies regarding online classes in the future, and 73.3% (66 respondents) answered that they “will adopt online classes as needed”. As the respondents’ experiences with online classes has increased, it is evident that they are willing to incorporate the positive aspects of online classes. The 11.1% (10 respondents) who selected “Other” included “will avoid online classes as much as possible due to university policy,” and “will not conduct online classes because the university does not have an Internet environment.” These two points are also thought to be one of the reasons for the 15.6% (14 respondents) who answered that they “will not conduct online classes (all classes will be face-to-face classes).”

Interviews with foreign institutions of higher education indicate that most countries and regions are returning to face-to-face classes. Nevertheless, not all regions have completely returned back to pre-COVID education methods, such as face-to-face instruction, but partially incorporating some online classes and continuing to use the Learning Management System (LMS). According

to interviews with JF overseas offices, the implementation of online classes has had several advantages, including the expansion of Japanese language learning opportunities for distant learners and working adults, as well as the ability to involve participants from Japan in online events. Many countries and regions have a policy of adopting online class formats as long as there are no problems in securing an Internet environment or human resources to manage both face-to-face and online classes.



[Chart 4-8 : Future plans and desires for online Japanese language classes, Overseas Japanese Language Instructors (A)]

4.2.2 Students' Preferred Style of Japanese Language Classes

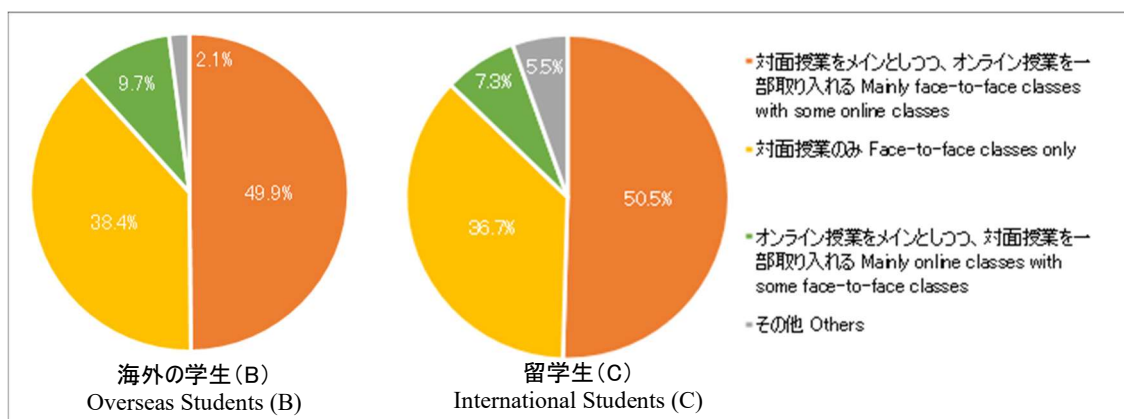
Students were asked what style of Japanese language classes would be most effective for them. Both overseas students (B) and international students (C) responded with “mainly face-to-face classes with some online classes” which was the most popular answer and accounted for almost 50% for both students. The second most popular answer was those who responded “face-to-face classes only” at just under 40% each. Those who chose “other” commented that “it depends on the student,” “it depends on the teacher's and student’s intentions,” “either is fine,” “both are effective,” “half of each is better”, and that “the learner should choose which is better.”

In addition, the respondents were also asked to provide an open-ended response as to why they chose that option. First, there were no significant differences or characteristics between the responses of the overseas students (B) and the international students (C). Most of the students who responded, “mainly face-to-face classes with some online classes,” basically insist that language classes should be face-to-face classes because interaction with teachers and classmates in the classroom is important. On the other hand, there are many references to the advantages of online classes: allows you to save commuting time and effort, allows you to learn well online if there is a lot of in-class interaction, allows you to learn more efficiently if a variety of learning methods are offered, allows you to learn grammar and listening at your own pace (on-demand),

allows you to learn with students in other countries, allows you to choose topics of your interest, the flipped classroom method is more efficient, etc. It was found that some students are actively trying to use online (on-demand) classes as a supplementary role, such as reviewing at home online (on-demand) in addition to face-to-face classes at the university, or taking outside online classes to achieve an even higher level.

Furthermore, students who responded with “mainly online classes with some face-to-face classes,” said that studying alone is better suited for them, it is a great way to learn from talented experts in remote locations, and that online classes allow them to learn in the process of doing instant research on the Internet and using AI to put their thoughts together correctly.

Like faculty members, an increasing number of students have realized the benefits and effectiveness of online (including on-demand) classes during the COVID-19 pandemic, and it can be assumed that not only face-to-face classes but also various learning methods and formats are becoming more accepted. Thus, it is expected that online classes, online learning materials and tools will become even more widespread in the future.



[Chart 4-9 : Effective learning style for learning Japanese, Students]

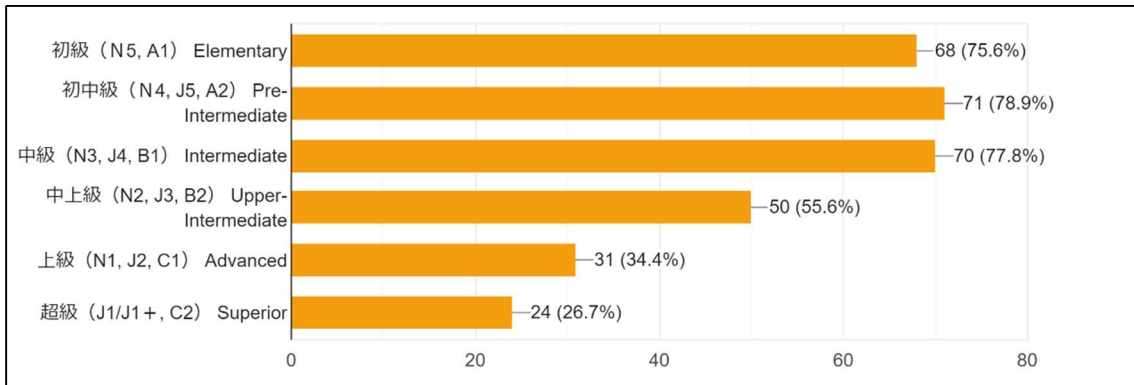
5. Suggestions for the Future

5.1 Considerations and Reference Information for Developing Online Learning Materials and Tools

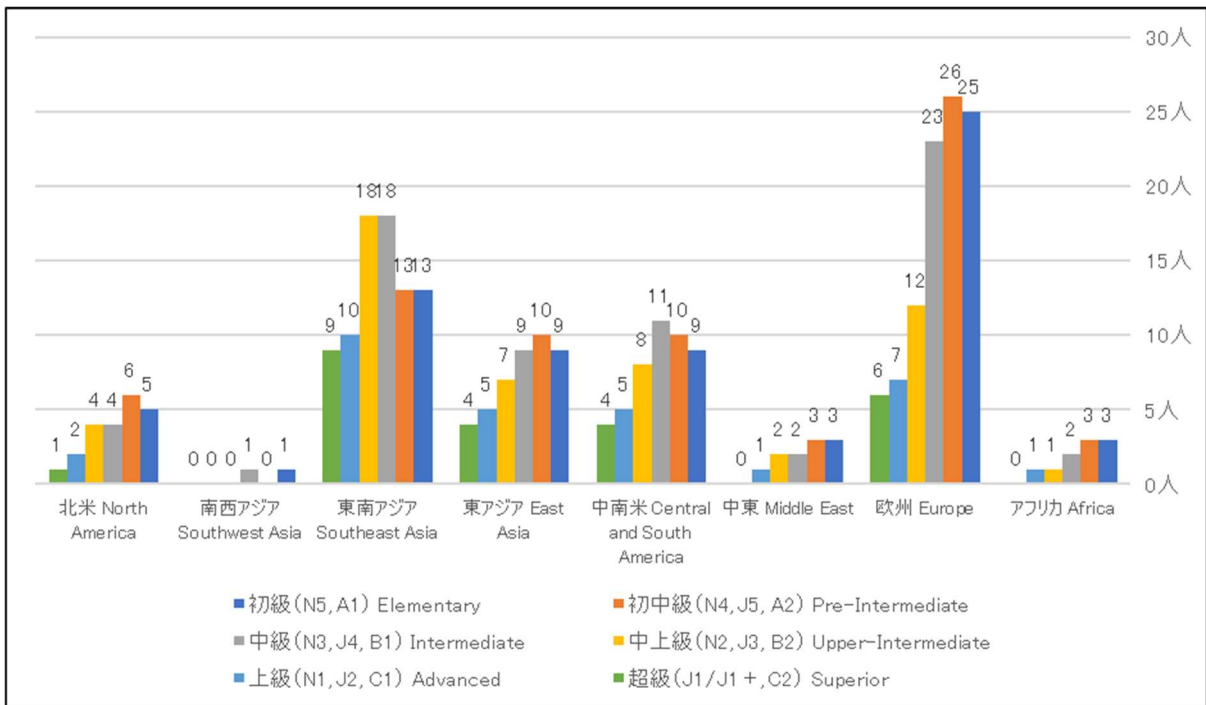
5.1.1 Japanese Language Levels in Need of Online Learning Materials and Tools

When overseas Japanese language instructors were asked which Japanese language levels they would need if they were to provide Japanese language online learning materials and tools, nearly 80% of the respondents answered the “elementary,” “pre-intermediate,” and “intermediate” levels respectively, while the need for the “upper-intermediate” level and above was not so high.

Next, the breakdown of levels by region shows that although the respondents are located in different areas, it can be said that there is a high demand for “elementary” to “intermediate” levels in Europe and “intermediate” to “upper-intermediate” levels in Southeast Asia.



[Chart 5-1 : Japanese language level of need for online learning materials and tools, Overseas Japanese Language Instructors (A) (Multiple answers allowed)]



[Chart 5-2 : Japanese language level of need for online learning materials and tools by region, Overseas Japanese Language Instructors (A) (Multiple answers allowed)]

5.1.2 Skills and Knowledge that Overseas Students Want to Acquire

For overseas students, we asked them about skills they would like to acquire, and for reference, international students were asked to respond in free form about classes they were happy to take in Japan and found useful (not limited to online classes).

While both overseas and international students have a wide variety of opinions, a relatively large number of students in both groups mentioned “kanji.” As for overseas students, there seems to be a high demand for information that is difficult to obtain from paper-based materials (mainly

comprehensive textbooks) and items that are difficult to master. For example, homonyms, polysemy, word usage, spoken language, young people's language/slang, academic writing, etc.

On the other hand, most of the international students' responses were "all the classes I have taken have been useful" and "face-to-face classes." In terms of content, many of the responses were comprehensive Japanese that integrates reading, writing, grammar, vocabulary, listening, and speaking skills, as well as discussion and conversation. On the other hand, there were also references to specific fields of study. For example, they are deeply related to university life: such as academic writing (reports and emails to teachers), presentations, and project work or career-related: such as honorifics and Japanese used in business or specialized fields: such as art history, ancient literature, and translation. Also, activities such as tandem learning, collaborative projects with Japanese students, and cultural experiences that can only be done while staying in Japan and activities that directly interact with Japanese people are also meaningful. Other responses mentioned classes focusing on practical everyday language skills, such as introducing oneself, shopping, asking for directions, etc., and classes explaining implicit Japanese social rules and contexts were also meaningful.

It will be important to determine what can be done online and what can only be done online, and to create online learning materials and tools that fully communicate these concepts to learners.

5.1.3 Online Learning Content in Needs

When asked what kind of learning content they would like to see in online educational materials and tools, all respondents seemed to have slightly less interest in "writing" compared to other items, but otherwise there was not much difference. The top two responses for overseas Japanese language instructors (A) were "listening" (68 instructors, 75.6%) and "speaking" (66 instructors, 73.3%) for overseas students (B), "vocabulary" (259 students, 76%) and "listening" (257 students, 75.4%) for international students (C), "vocabulary" (76 students, 69.7%) and "listening" (74 students, 67.9%). It was found that there were slight differences in needs between Japanese language instructors and students.

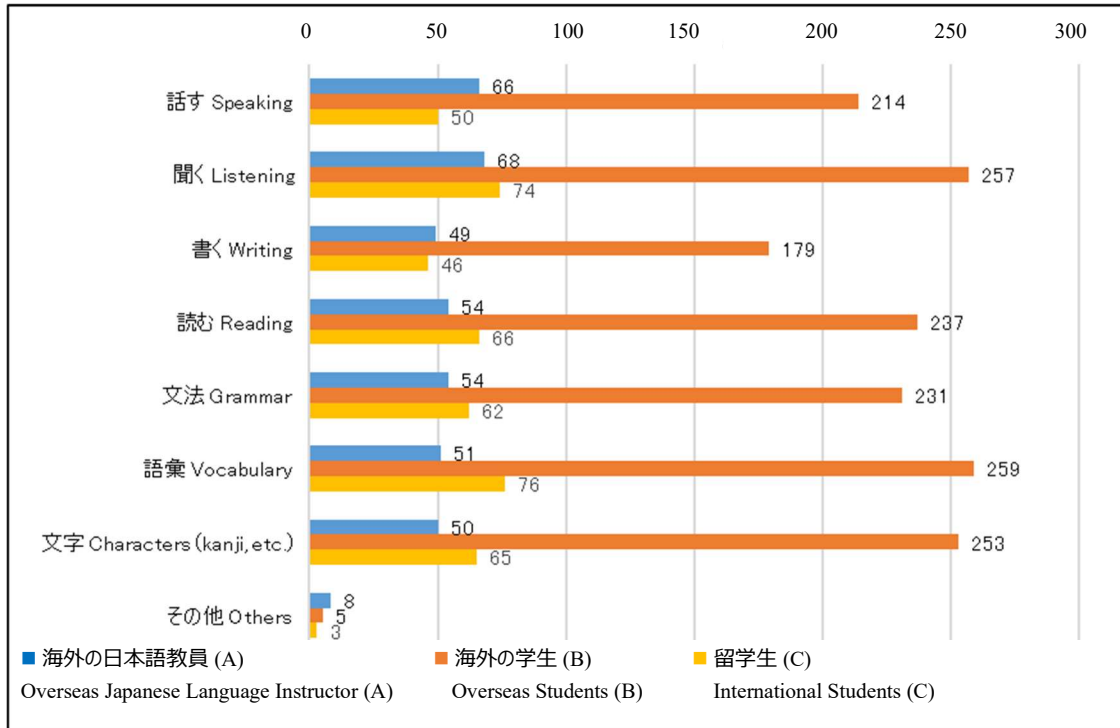
When asked specifically what kind of content they would like to see, the responses varied widely and were very specific, but both overseas Japanese language instructors and students made relatively frequent references to kanji learning materials and tools.

Overseas Japanese language teachers often request content that introduces Japanese culture and current Japan. Other examples include videos of natural Japanese conversation, grammar explanations (with plenty of usage and example sentences), pronunciation materials, vocabulary materials (with plenty of collocations), reading materials (elementary, intermediate and above), dictation materials, materials with a specific purpose including how to write papers, materials that allow students to practice conversation on their own, and more. There is also a unique idea: a kind

of catalog of various realia or props to show to students. Some commented that it would be useful to have online materials and tools for quizzes, tests, and practice exams, and that it would be good to have supplementary materials that could be used in the classroom along with the paper-based materials.

Examples that focus on functionality include those that allow students to track their own mistakes and learning progress in real time, educational materials with social media functions, and those with portfolio functions, etc. Some say they prefer learning materials that can be finished in a short time. Another opinion should be noted that a guide for online learning is needed because the world is already full of online materials and tools.

On the other hand, students are more likely to focus on the format of educational materials and tools, which are mainly videos (YouTube) and apps, with also audio and podcasts being the most prominent responses. There are quite a few requests for text media (e-books, reading materials) as well as audiovisual media. In addition, students from abroad are more interested in diverse content than international students staying in Japan. There is especially a high demand in grammar and listening materials, but many other categories are also mentioned, including vocabulary, conversation, reading comprehension, written expressions, honorifics, pronunciation (which provides feedback), and JLPT preparation, etc. Many people named the online learning materials and tools that they actually use, which were often NHK and JF materials. Some seek quizzes, practice tests, and flashcards that allow them to check their own abilities/levels and aids for learning, as well as tools that allow them to create their own flashcards and tests. Others focus on the functional aspect, asking for interactive features such as role-playing and chatting, as well as fun learning experiences like games. International students also do not differ significantly from the opinions of overseas students. However, references to content related to real life were found more than overseas students, as they are currently living in Japan. This includes practical conversations commonly used in daily life and learning materials that show the subtle differences in nuances of sentences.



[Chart 5-3 : Online learning content by skill that you wish you have (Multiple answers allowed)]

5.1.4 Requirements for Online Learning Materials and Tools

This section presents the results of the survey in which overseas Japanese language instructors, overseas students and international students were asked about the length of on-demand video materials and the conditions for using online materials and tools.

When viewing on-demand educational materials (videos), the respondents were asked how long they would like to watch each one. In addition, overseas Japanese language instructors were asked about the desirable length for the video materials on the assumption that they would use the videos in their classes. Both overseas students (B) and international students (C) were most likely to answer “up to 10 minutes,” with 44.9% of overseas students (B) and 57.8% of international students (C). The second most common response was the same for both overseas students (B) and international students (C) again and it was “up to 30 minutes.” However, perhaps due to the condition of being used in class, the most common response from overseas Japanese language instructors (A) was “up to 10 minutes,”(44.4%), similar to students, but the second most common response was “up to 5 minutes,” which also accounted for 34.4% of the responses. Students who selected “others” had comments like: “It depends on the content,” “A break in the middle would be nice,” and from overseas Japanese language instructors: “One to two minutes is good for use in listening comprehension practice.”

As mentioned in the student’s comment, it can be generally said to keep each video under 10

minutes, although this depends largely on the content of the video.

Next, regarding the cost requirements for using online educational materials and tools, the largest number for all overseas Japanese language instructors (A), overseas students (B), and international students (C) responded that they “will not pay for online learning materials and tools,” with Japanese language instructors (A) accounting for more than half of the responses. Both overseas students (B), and international students (C) accounted for about 40% of this response. However, there were the same number of students who selected “outright purchase (download).” if the number of students who selected “outright purchase (download)” and “flat rate” were combined, the number of respondents will be more than half of the students, which would account for more students than those who selected “will not pay for online learning materials and tools.” Thus, it can be seen that although the hurdle for paid content is high now that free online educational materials and tools can be easily accessed and downloaded, some people, especially students, are willing to use even paid content. When comparing the paid content, all groups prefer the “outright purchase (download)” rather than the “flat rate.”

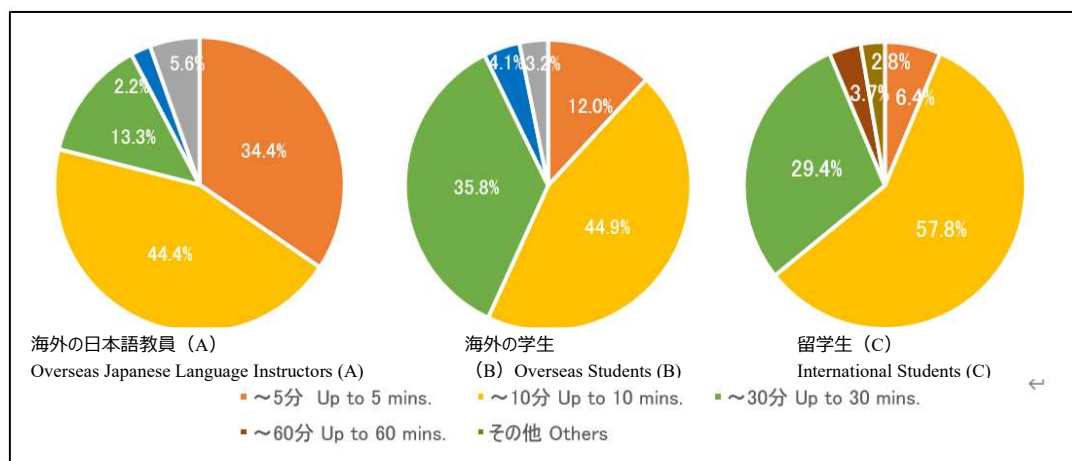
The opinion of “others” is worth noting. Comments from overseas Japanese language instructors (A) include: “It takes time, but it is better to create your own learning materials,” “It depends on the content,” “It would be good if you can try it out for free,” and “I don't have the budget for paid online learning materials and tools.” Comments from overseas students (B) include: “I will buy it if I try it for free and think it is worth the money,” “If I pay for it, I hope the materials can be used offline as well,” “I prefer videos from famous and easily accessible video sites such as YouTube channels,” and “Unless the content is affordable, great and necessary for me, I will not use paid content.” Lastly, the comments from international students (C) were few, but it included: “I prefer a subscription that I can cancel at any time.” and “I might buy it if there is no other free content available on a particular topic (there is free content on almost every topic),” etc.

If online materials and tools are to be charged for, not only should they be well communicated that the content is worth the money, but offering a free trial system or a partially free content should also be considered.

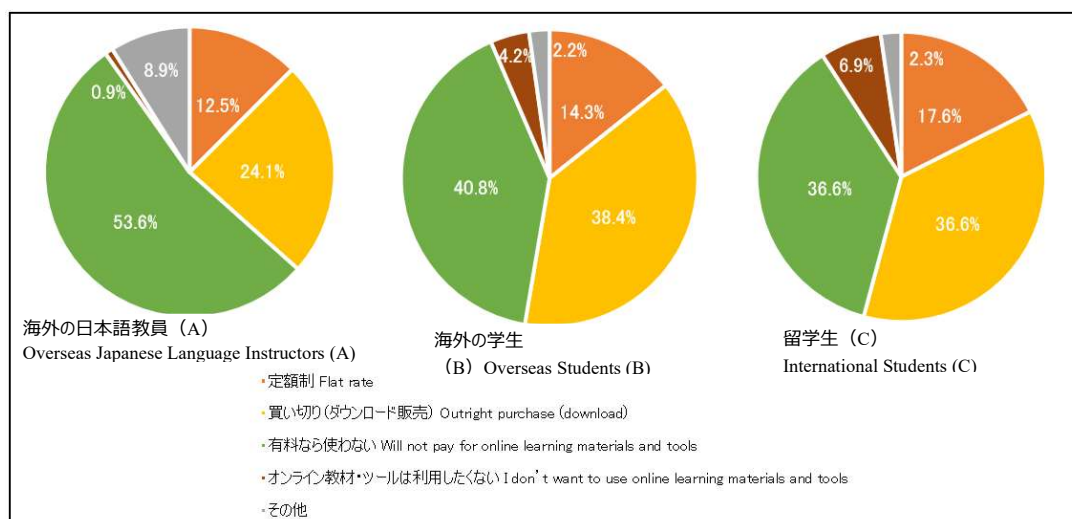
Next, only overseas Japanese language instructors (A) were asked about the conditions of using online tools apart from the cost. More people supported “yes” than “no” for “quizzes, assignments, and final exams.” With regard to an Open Badge, which has been gaining attention in online learning in recent years, 25 respondents (27.8%) said that “An Open Badge is issued”. By region, 1/3 were from Africa, 8/32 from Europe, 1/3 from the Middle East, 4/12 from Central and South America, 4/11 from East Asia, 5/22 from Southeast Asia, and 2/6 from North America, which showed no regional characteristics.

We would like to introduce some of the “other” opinions. Comments include: “I can freely create tests with a specific scope,” “It is free to use and reliable,” “I get feedback on my notes and results,” and “I use it as supplement to my classes, so there are no specific requirements.”

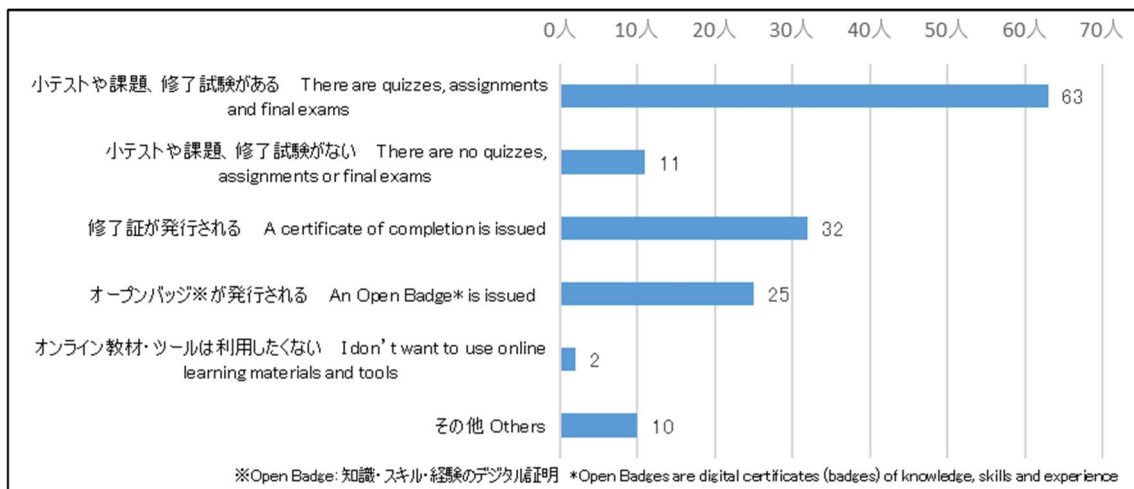
The above results and comments are primarily helpful when offered as course materials rather than as a single material.



[Chart 5-4 : Desired length of on-demand materials (videos), Students]



[Chart 5-5 : Conditions for using on-demand educational materials and tools (in terms of cost)
(Multiple answers allowed)]



[Chart 5-6 : Conditions for using on-demand learning materials and tools (e.g., quizzes), Overseas Japanese Language Instructors (A) (Multiple answers allowed)]

5.1.5 Points to Keep in Mind when Conducting Live Online Classes

In “4.1.1 Status of online classes at overseas institutions of higher education,” showed that most higher education institutions have experience in conducting live online classes. One regional overseas office said that by converting to online classes, they were able to find intermediate-level learners nationwide which were not originally large in number, but then got them to participate. However, in “4.2.2 Students preferred style of Japanese language classes,” many students mentioned two main disadvantages of live online classes: distraction and difficulty in concentrating, and the tendency to lose interaction with classmates and instructors. Related to this, Japanese language instructors at overseas higher education institutions and overseas offices have pointed out the following issues: “It is difficult to check whether students are participating and whether they are actively participating,” “It is difficult to pay attention to the entire class,” “It is difficult to see interaction among students and there isn't much connection between them,” and “It is difficult to conduct tests online.” In addition to technical issues such as the Internet environment, we would like to introduce some innovations received mainly from overseas offices to address these unique challenges of online classes.

First, regarding the point that students have difficulty in concentrating on live classes, there are examples of “actively incorporating games that take advantage of the characteristic of being online into the classes” and “setting the class time shorter in the beginning and gradually extending the time as student's get used to it.” There are also ways to mix up the classes and try not to complete everything in a live class, for example, by sharing online resources prior to class. This idea is to save grammar explanations and avoid spending class time on questions that can be understood if a student looks at them themselves. It would be important to present a variety of

resources in advance so that learners can make their own choices and view information online outside of class. Many institutions have devised ways to have students prepare in advance by handing out supplementary materials for grammar, vocabulary, and other areas that they can study on their own, and to focus on output during class.

With regard to creating a classroom atmosphere and promoting interaction among learners, one example is to place virtual study spaces to provide opportunities to talk outside the classroom. In addition, it is also important for class management to use online tools (e.g., Google Classroom and Facebook Groups, etc.), and for teachers to frequently contact and respond to individual students. In some cases, each class has its own bulletin board tool (e.g., Padlet), and homework assignments and various other communications are done using the tool. Since it is difficult to make connections among learners, it would be good to create a “go to” place for everyone, so that they can make connections, and also solve questions when necessary.

The above innovations will be useful for live online classes, and also for some universities with on-demand courses.

5.1.6 Topics of Interest and Preferred Learning Styles for Overseas Students

According to interviews with overseas institutions of higher education, overseas offices, and the Japanese Language Center for International Students (JLC) at TUFS, there are many people across countries and regions who are interested in Japan and the Japanese language through anime and manga, but there is a wide variety of topics of interest among students who have begun studying Japanese, with nothing in common. Those who are considering working in Japan are interested in the Japanese economy and business etiquette, while students in the literature department at universities in their home countries are also interested in Japanese literature. It has been pointed out that the current generation of university students tends to find what they like and pursue it on their own, and that trends are no longer relevant.

However, overseas students tend to be more interested in current Japan, such as the lifestyle of current Japanese university students of the same generation, and information on current Japan that cannot be found in paper-based textbooks. Learning styles are also diversifying. Many students customize their own learning style by successfully incorporating online materials and tools. In addition, as noted above, having many requests for video materials shows that learning Japanese through video materials is quite common now. Nevertheless, numerous students also feel strongly about the importance of interactions in face-to-face classes, and many students seem to prefer collaborative learning that they cannot do alone.

5.1.7 Needs for Online Learning Materials and Tools for Japanese Language Instructors

Overseas Japanese language instructors were asked if they would like to use Japanese language

online learning materials and tools, if available, to improve their teaching. Including those who already use them, 93.3% responded that they would like to use them, indicating that the need for content for teachers is very high.

When asked specifically what kind of educational materials and tools they would like to have, we received a wide variety of responses. The common requests among many of them was a desire to obtain up-to-date information. For example, new teaching methods and progressive class practices, introduction of featured academic articles, setting up opportunities to learn, and exchange opinions on policies and current challenges related to Japanese language education in Japan. Also, information and know-how on how to run classes is also needed. For example, ideas for oral examinations, demonstration videos, introductions on how to use resource collections, etc. Some have asked for guidance on how to use online materials and tools. Introducing concrete examples of classes using online learning materials and tools, how to create easy-to-understand and attractive online learning materials (videos), and how to utilize ChatGPT by using AI-related learning materials and tools. Other requests include a collection of frequently asked questions from students, a database of questions to create a comparative tool and test for upper-intermediate sentence structure expressions, and conversational examples of unexpected situations. Some non-native Japanese-speaking instructors have expressed a desire for opportunities to speak with Japanese instructors.

5.2 New Online Japanese Language Education Content that Universities Should Create

Japanese language educators in Japan and overseas unanimously state that the number of online resources has increased dramatically due to the COVID-19 pandemic, and that the number of learners who study Japanese on their own has increased. According to the Japanese Language Center for International Students(JLC) at TUFS, more students are learning basic skills such as characters before coming to Japan, and fewer students are starting to learn Japanese without having any learning experiences. With many high-quality online learning materials and tools provided by organizations such as JF already available, we will consider the type of content that universities should create and the sufficient target level of students.

First of all, it is desirable to create content for intermediate or higher Japanese language levels. In “5.1.1 Japanese Language Levels in Need of Online Learning Materials and Tools,” we noted that the needs for the intermediate level and above are not so high according to the results of the questionnaire survey. However, since there is already a full range of online learning materials and tools for introductory to elementary levels, the need for universities to create new content in the same level range does not appear to be high. It would be more efficient to instruct students who wish to improve their overall Japanese language skills to utilize existing learning materials provided by organizations such as JF.

According to the results of interviews with overseas higher education institutions and JF overseas offices and domestic institutions, there seems to be demand for materials that are intermediate level or above and that delve deeply into specific areas, such as academics and business. Since university students who have reached the intermediate level of Japanese and above are often studying with a specific purpose, it would be good to have content that leads to academic learning, such as presentations or report writing. These are also the class contents that international students found useful as described in “5.1.2 Skills and Knowledge that Overseas Students Want to Acquire.” At the same time, the content should include information that overseas students are looking for, which is difficult to obtain from paper-based general textbooks.

Some students also commented that advanced level Japanese cannot be taught in classes at many overseas universities (learners need to study it on their own), but there is not a wide variety of learning materials available. Some overseas offices mentioned that at the advanced level, courses for the general public do not have the content at the level they want to learn, or there are not many regular courses in the first place, making such content only available with private tutors. Thus, there may be some need, for example, for comprehensive courses at the advanced level and above. There are also opinions that demands can be anticipated for self-study type material that are not courses, providing a number of challenge questions, in which a certain number of questions are posted on a regular basis.

In addition, according to overseas Japanese language instructors who teach in literature departments of overseas universities, students who began studying Japanese in university due to the influence of anime and manga tend to shift their interest toward literature and Japanese studies in around their third year, while there is not much content in literature, linguistics, and culture, either online or in print media. Therefore, there is room for consideration for universities to take on the responsibility of producing learning materials that allow students to learn about these topics in simple Japanese.

When we think about what kind of educational materials only universities can produce, materials such as the following would be ideal: videos that provide specialized lectures without using difficult Japanese, materials that are closely related to university life, and materials that incorporate the voices of current university and international students.

Video contents that provide specialized lectures in simple Japanese could also play a role in preparation for the EJU, an issue discussed in Chapter 3. As for content closely related to university life, requests for such content have been heard from overseas offices, overseas higher education institutions, and the Japanese Language Center for International Students (JLC) at TUFS. For example, learning materials dealing with vocabulary unique to universities (such as words used in course registration, required/elective courses, etc.) are considered to be helpful. Furthermore, although they may not be considered Japanese language learning materials, videos

that show a day in the life of a Japanese university student and the four-year flow of university life, as well as videos of messages from current students, could be very effective tools for promoting study abroad. In order to make the content more student-oriented, it would be a good idea to collect ideas from current Japanese students and ask them to be involved in the creation of the content. In section 5.1.3, “Online Learning Content in Needs,” we introduced the opinion that overseas Japanese language instructors are looking for content on the latest Japanese culture and circumstances. It might be a good idea to ask current Japanese students or international students studying in Japan to help create such of content.

In addition to the above, providing an online community where current Japanese university students and overseas university students can interact regularly and use the Japanese that they have learned would also be something that only universities would be able to do. As mentioned in Chapter 3, this could also contribute to solving the problem of the lack of opportunities to use the Japanese language that students studying Japanese abroad face.

5.3 Points to Keep in Mind for the Dissemination of Online Materials and Tools

Based on advice from JF’s domestic institutions that have developed a number of effective online contents, the following points should be noted when universities develop and disseminate online learning materials and tools.

First, online trends and technology are changing rapidly and require constant updates and responses. In addition to adopting new trends, post-development operation and maintenance systems such as those for handling problems or modifications, must be fully envisioned in order to fully utilize the materials and tools that have been developed. When developing on-demand materials and tools, it is important to set up a support desk to respond to inquiries about problems and to secure human resources.

It is important to devise the content and specifications. Setting up real-time updates of culturally relevant and systematic learning materials is recommended as they quickly become out of date. Courses with teacher support and multilingual support will have a significant impact on the spread of such programs too. In addition, it may be better to have downloadable learning materials since some regions may not have a stable Internet. Depending on the Internet environment and the prevalence of digital devices in the target country and region, the format of the online material (browser or app) should also be fully considered from the development stage. In order to ensure continued use, it is important that access to the website be stress-free and easy to use. In addition, if the app is to be used in educational settings such as overseas institutions of higher education, it would also be effective to provide a full range of downloadable supplementary materials such as word lists and quizzes. Finally, it goes without saying that the appearance and design of learning materials and tools is important.

5.4 Ideas for Publicity Overseas

5.4.1 Effective Publicity for Japanese Language Learning Materials

To effectively promote the developed learning materials/tools from a teacher's perspective, it would be good to present variations of how they can be used in the classroom. If the materials are also intended to be used by overseas Japanese language instructors, it is important to clearly indicate the rights to the materials and introduce supplementary materials if available. From the learner's perspective, it is essential to first make an appeal to the audience of the material in order to get them interested and to make access. From the viewpoint of PR, active social media promotion and advertising are essential since online learners use the Internet on a daily basis. Information on study abroad must be provided in the local language, and the same applies to Japanese language education. Social media influence is said to be particularly powerful in Asia, and since the major social media platforms vary by region, it is important to identify which media has the greatest influence in the targeted region.

Yet, PR through social media alone is not enough. In regions such as Europe, many students go looking for information they want without being influenced by trends, and some say that word of mouth is more effective than advertisements. In such regions, word of mouth among students and seniors, information distribution through teachers' associations and mailing lists, and publicity at face-to-face events are also effective. It will be necessary to conduct a wide variety of publicity activities.

5.4.2 Information Dissemination as “All-Japan”

One of the most common comments from our interviews overseas was that there are so many existing online Japanese language learning materials that it has become difficult to distinguish the characteristics of each material. This suggests the importance of organizing all Japanese-language learning materials and disseminating them to the world after organizing the characteristics of each material in a way that is easy for users to understand. There are several websites that compile Japanese-language learning materials, and it will be necessary to coordinate them through a combined effort of several institutions within Japan.

5.5 Possibilities for Collaboration for Promotion of Study Abroad to Japan

In regards to requests for information and support to promote study abroad, surveys and interviews found that the number of requests for financial support was by far the most common, according to overseas Japanese language instructors, coordinators of overseas higher education institutions where our Global Japan Offices and Global Japan Desks are located, and JASSO's domestic institutions. Specifically, these include the expansion of scholarship programs and

tuition fee exemptions, introduction of part-time jobs, and enhancement of student dormitories.

In addition to the above, interviews with Japanese language instructors at JF's overseas offices and JASSO's domestic institutions found that "support for technical terms in the field of study" is also requested in terms of education. For example, there were requests such as the following: "It would be good if there is a preparatory process like a pre-university class before studying abroad or before the start of a semester," "It would be helpful to know how to read a Japanese university syllabus," and "For graduate school applicants, information on how to write a research plan and other basic information for the entrance examination for graduate school would be helpful".

In some areas where JASSO's overseas offices are not located, the existence of study abroad fairs and JASSO's "Study in Japan" website is not well known. This situation is making it difficult for some students to access basic information about studying in Japan.

In addition, the universities and institutions interviewed for this report offered a wide variety of opinions and ideas regarding not only Japanese language education but also the promotion of study in Japan in general. These include initiatives that can be realized through collaboration among multiple universities, cooperation between universities and other institutions, or through the initiative of related organizations and ministries, in addition to those that can be implemented by individual universities. The following is a summary of specific measures in the Second Proposal of the Japan Council for the Creation of the Future of Education (J-MIRAI initiative).

(1) Creating Opportunities for Study Abroad in Japan

- Enhance the lineup of courses related to Japanese studies (Japanese literature, history of thought, general history, etc.) that students can participate in during their stay in Japan even if their Japanese language level is not high.
- Establish short-term summer courses that students can take prior to full-fledged study abroad.
- Enhance systems that allow international students to participate in classes and student life in the same way as regular Japanese students, rather than gathering only international students together to study at international student centers, etc.

(2) Public Relations and Information Dissemination Online

- In addition to job hunting schedules and general employment methods, show the possibilities of studying abroad in Japan in a broader perspective (for example, senior international students who are already working in Japan could share their experiences as role models in the form of videos in their native language. This will make it easier for new students to

visualize their future and increase their motivation to study abroad).

- Disseminate university information in multiple languages, mainly English (disseminate the same amount of information in different languages as the amount in Japanese).
- Explain how to study abroad in Japan and what preparations you should make in an easy-to-understand manner.
- Create, provide, and publish information and tools that inform students on which university or department in Japan provides the content they want to study.
- Provide information on how people with various religious restrictions could live their lives (multilingual/video format preferred).
- Provide information for students studying abroad in rural areas - not for sightseeing, but for daily life (information about daily life is important not only for students but also for reassuring their parents who are sending them abroad to study).

Interviews with overseas Japanese language education institutions conducted in this survey revealed that in some regions, information on study abroad (including fairs) is not sufficiently reaching potential students. Further cooperation with Japanese language education institutions around the world could provide a foothold in disseminating information regarding studying in Japan.

(3) Public Relations and Information Dissemination On-Site

- Hold exchange meetings between students currently studying in Japan and those who are going to in the future, or hold online class experiences hosted by universities, information sessions, advice sessions, and exchange meetings to convey the benefits of studying in Japan (If Japanese university students act as tutors and support students in online social events or in their studies, students overseas can feel more familiar with that university.)
- Hold events such as talks at local universities by Japanese international students.

(4) Increasing Flexibility in Requirements and Procedures at Admission Level

- Regarding actual procedures, standardize the formats of submitted documents and various certificates among universities.
- Reconsider the conditions of Japanese language proficiency since the N2 level is too high a standard for admission.

*It is suggested that knowing that academic affairs and administrative staff are available in English (multilingual) and are open to inquiries before studying abroad gives international students peace of mind.

(5) Other Support During Study Abroad & Collaboration Between Universities

- Enhance daily life support, especially in the early stages of studying abroad, so that exchange students do not feel anxious about life in Japan.
- Build a support system that involves not only the university organization but also affiliated students.
- Expand the “buddy system” in which Japanese students support exchange students’ daily lives and enhance general mental support.
- Enhance opportunities for international students to actively interact with Japanese students by setting up programs or allowing international students to take language classes with Japanese students as Teaching Assistants.
- Increase career related information, career guidance and counseling programs, and post-graduation follow-ups.
- Collaborate with Japanese language instructors at overseas universities, and share information on curriculums at Japanese universities and international student support.
- Share detailed course information in advance for exchange students to determine whether credits will be recognized at their home university.

In the Second Proposal of the Japan Council for the Creation of the Future of Education (J-MIRAI initiative), the following is proposed as a method for how to invest in people for a post-COVID global society: Japanese society as a whole, which includes education, employment, immigration control, national and local governments, institutions of higher education, and industry, must share the idea of globally capable human resources and cooperate to achieve the same goal, and take more effective measures by linking a wide range of related measures implemented by the national government and various other organizations in coordination. The policy also states that in order to create opportunities to study in Japan, it is necessary to strengthen local methods to recruit students at an early stage, strategically publicize and disseminate information about Japanese universities, and promote Japanese language education in an integrated manner. It is important to have in-depth cooperation and collaboration not only with universities as the sites for receiving international students, but also with related ministries and agencies, JF, JASSO, and their local offices. We hope that this survey will serve as an opportunity for further efforts in the area of Japanese language education and learning.

Finally, the survey results are based on the premise that, although the survey covered priority areas, it did not cover all countries and regions due to the timing of the survey. Thus, we hope that this survey will serve as an opportunity to identify needs in specific countries and regions, and to raise the question of how to further identify specific needs.

Reference 1: List of Members of the Needs Assessment Survey Study Committee

Name	Job Title
OTSU Tomomi*	Special Advisor to the President, Tokyo University of Foreign Studies
YOTSUYA Tomoaki	Managing Director, Japanese-Language Department I, The Japan Foundation
SHIMBOKU Kenji	Director, General Affairs Division, Tokyo Japanese Language Education Center, Japan Student Services Organization
ONO Masaki	Professor, Institute of Humanities and Social Sciences, Director of Center for Education of Global Communication, University of Tsukuba
USHIKUBO Ryuta	Associate professor, TOYO University Center for Global Education and Exchange
NAKAMATA Naoki	Associate Professor, Osaka University, Center for International Education and Exchange
SUZUKI Mika	Professor, Institute of Japan Studies, Tokyo University of Foreign Studies
HAMADA Kaori	Designated Administrative Expert, Tokyo University of Foreign Studies

As of October 23, 2023 (Reiwa 5) *: chairperson

Reference 2: Summary of Interview Survey Results

2.1 About Japanese Language Courses Offered Online and Their Learning Materials

(1) Results Specific to Online Courses

<Asia>

- In response to the level of Japanese language learners in Asian countries, most of the online content corresponds to CEFR A1 level learners. The "Japanese in Anime & Manga" course with teacher support is thriving as a course that triggers interest in the Japanese language. There is demand for entry-level courses.
- Due to the time difference and traffic congestion in Asian countries, many people in rural areas are now able to participate by taking the course online.
- Zoom recordings of classes have become assets. The videos are being used in a variety of ways such as providing videos to absent students or for younger teachers to watch as preparation material for their classes.

<Europe and North America>

- All Japanese language courses that have been conducted in person are now conducted online. Incorporation of face-to-face courses is being considered, but online courses are planned to be kept. Asynchronous courses and virtual study spaces have been launched under the premise of online classes. The virtual study space is intended to create connections among students, which tend to be weak in online classes. With time differences even within the nation/region, having the option of asynchronous classes and resources is effective since anyone can participate anytime and anywhere.
- Online classes have been a great success, and learners have gathered from all over the country. The online classes have been able to tap into the needs of learners nationwide, especially at the intermediate level, where the number of students was not large.
- In some classes, learners are studying on their own through self-study of on-demand materials and focusing on output in class. This has the advantage that learners can study at their own pace, practice on their own, and then participate in class to demonstrate their acquired skills.

(2) Learners' Responses

<Asia>

- About half of the participants in the self-study course are university students, and a certain percentage of them are high school students.
- University students account for 70-80% of the participants, and the rest are employed or homemakers.

- There were positive comments from students that they could take classes even during the COVID-19 pandemic, or they did not have to commute to school if they lived far away. There were some comments about the difficulty to hear due to problems with the Internet environment, but many were positive about the online classes in general.
- Some pointed out the difficulty with online classes to make new friends or to increase opportunities for interaction through Japanese language study.

<Europe and North America>

- North America: Many of the participants were employed. The number of high school and university students were extremely low. The course content and schedule, as well as the fact that it is online, were the most common reasons for taking the courses. Some students responded that they were recommended by other people.
- Europe: The main group of students were young adults, including university and graduate students in their 20s and 30s. The number of junior and senior high school students has also increased after the courses became online. Many high school students wish to study in Japan as exchange students. Although these students cannot go to Japan right away, it is believed that an increasing number of them have started learning Japanese to prepare for their possible future study in Japan.

(3) How to Use Learning Materials According to the Circumstances of the Country

<Asia>

- Considering the situation of Internet connection, courses that can be used offline are suitable for studying Japanese in rural areas.
- The biggest challenge with online classes is keeping students focused, therefore, classes are designed to be short at the beginning and gradually become longer. Class management methods include frequent contact using Google Classroom or Facebook groups, and careful individual support is provided.

<Europe and North America>

- Games such as “Kahoot!” and “ito” can be played in online classes.
- Padlet is used for management of each class. Homework and various communications are also done on Padlet. It takes time for all learners to achieve the same level of understanding when learning online, so it is a good idea to create a common place where learners can find answers to their questions or uncertainties.

(4) Ideas for Dissemination

<Asia>

- Smartphones are becoming popular, various services are becoming more widespread, and many people including high school students are starting to own a smartphone. Therefore, PR on social media (Facebook, X, Instagram) and information dissemination on WhatsApp are more effective than posting on websites.
- Using Facebook is most effective, but an app called “Zalo”, which could be considered as an equivalent to WhatsApp, is equally popular.
- Some private Japanese language schools have telephone sales.

<Europe and North America>

- Courses are advertised on websites, social media, Instagram, X, and newsletters. In the early days, services used paid publicity to expand their reach, or used Google Ads to rank higher in search results.
- Learning fairs are held at the beginning of course registration periods. The learning fairs are held in cooperation with universities and Japanese language schools, and allows for explanations of course levels and programs, as well as a Q&A session.
- Europe does not like passive information gathering methods such as social media PR. Websites or newsletters are considered to be more effective as the source of the information is clearly identifiable. It is also effective to contact each Japanese language teachers' association depending on your needs.

2.2 Results and Challenges of Online Classes by Japanese Language Education Institutions, and Major Online Learning Materials used by Japanese Language Education Institutions and Learners

<Southeast Asia>

- Publishers that have Japanese language education contents or other language education contents are also offering online classes. Most are paid services.
- Indonesian versions of the "HIRAGANA Memory Hint", "KATAKANA Memory Hint", and "KANJI Memory Hint" series have been released. In addition to translation, Hiragana and Katakana have been specially developed for Indonesian speakers, and many learners use them to learn letters. If you tell students to download the app and work on the assignments before the first class, they will be able to recognize hiragana and katakana quite well. There are very noticeable effects even in regular classes. It is effective to use apps in combination in regular classes.
- There is a popular YouTuber named Jerome who is studying abroad at Waseda University,

and his YouTube channel "Nihongo Mantappu" is explosively popular among middle and high school students in Indonesia.

- "Mazii" is known as a dictionary app that allows you to self-study kanji and grammar. Duolingo is also widely recognized as a self-study tool.
- Many people are utilizing YouTube to study.

<Southwest Asia>

- In order to avoid traffic jams and reduce classroom maintenance costs, all existing Japanese language schools are shifting towards online-only schools. Online is the standard, and students only gather for special events like offline meetings.
- Smartphones are becoming more and more popular, and many learners are taking classes using their smartphones. Yet, very few university students own laptops, and people tend to prefer apps.
- Government-led online learning websites are not popular.
- Each educational institution seems to be using Learning Management Systems (LMS) independently. Google Classroom is the most popular LMS. As of 2020, the usage rate of LMS was around 50%.

<Europe and North America>

- Although high schools and universities have returned to face-to-face classes, "flipped classroom videos" and homework digitization are continuously implemented. In addition to Moodle, people are also using an LMS called "CANVAS" increasingly.
- Students are using online drill creation functions such as Google Forms and Quizlet to share their lessons for self-study, review, and homework, and to compete with classmates at the beginning of classes.
- There is also information that an instructor made a podcast (review of the day's lesson) for learners. Some teachers are practicing a combination of online classes and online content.
- Due to the spread of online tools that can be easily used, it has become possible for teachers to have students create their own learning materials instead of having to create everything themselves. Another practice is to have students create flashcards for homework or review tests. Learners can learn, and teachers can also learn from these learning materials.

2.3 Topics that High School and University Students are Likely to be Interested in, and Preferred Japanese Learning Style

(1) Topics that Students are Likely to be Interested in When Learning Japanese

<Asia>

- Many have a broad and shallow interest in Japanese culture in general, from traditional culture such as tea ceremony to pop culture.
- Many also have strong interests in the theme of food.
- University students tend to be interested in the way Japanese people work, along with business etiquette. Rather than exploring the reasons why cross-cultural conflicts occur through case studies, they are more interested in superficial manners such as seating order and how to use chopsticks when eating.
- There are many role models who work as engineers at Japanese companies, and they seem to be inspired by them.
- Virtual technology such as AI and VR and games are popular. Many people are interested in Japan and anything that uses Japanese in the virtual world.
- Many are also interested in stories about Japanese people's actual lives, club activities, and part-time jobs.
- The JLPT is one of the important elements for Japanese language learners, thus gaining a lot of interest. Many may also be interested in topics that will be asked in the JLPT.

<Europe and North America>

- High interest in traditional culture, anime, and food. High school and university students are particularly interested in anime. Traditional culture includes sumo wrestling, flower arranging, tea ceremony, Japanese sweets, kimono, and townscapes.
- As information is easily obtainable, more people are becoming interested in Japan and the Japanese language. (Example: finding interest in Japan due to liking sake, or seeing a Japanese player do well at the World Cup, etc.)
- Many people who come to JF courses wish to go to Japan someday. For that reason, many do not mind keeping anime and manga a hobby, but wish to have conversations with Japanese people in class and talk about hobbies in Japanese. Many also mentioned that the theme of conversation doesn't have to be related to pop culture.
- Gen Z tend to find what they like and pursue it on their own. As the topics that students are interested in are diversifying, there are no requests for their favorite topics to be covered in classes. We also found that learners have different preferences, thus, there is no need to incorporate popular themes into classes.

(2) Preferred Japanese Learning Style

<Asia>

- Many people study using an app called Duolingo: about 70% of people used this service at the time this survey was conducted. Using apps to study has become the standard.

- Those who learn by taking courses tend to seek detailed explanations, while those who are able to self-study learn at their own pace using apps and YouTube. There could be a tendency towards polarization.
- Some people use the KakaoTalk app to practice speaking with Japanese people. Each student is looking for various learning methods and studying in their own way.
- The number of people who like to study by watching videos is increasing. Learning styles are diversifying.
- Many people are good at conversation and oral communication.
- When we held an offline quiz competition using the Quizizz app, we received far more applications than expected, making the event a great success. Attracting a variety of participants depends on how it is carried out.
- Our voice-over activities using Japanese anime and manga websites have received good feedback.
- Trial classes and free talk sessions with Japanese people are also preferred.

2.4 Information Dissemination and Support Necessary to Connect Japanese Language Study or Culture Experience to Study in Japan

(1) Provision of Japanese Language Learning Content

- The Japanese language skills required to keep up with university classes and specialized knowledge may not be sufficient only with JF lectures alone. It would be good to have a preparatory process such as a pre-class in advance.
- There is not enough content for advanced students (learners who mainly belong to universities), so having such content would be helpful. Since there is also no content at the level they want to learn at Learning Fairs, learners go to private tutors.
- There are not many regular courses to begin with at the upper-intermediate level and above. It would be better if there were organized and regular courses, such as weekly learning materials, to motivate the learners. For intermediate and advanced students, asynchronous courses or self-study courses would be helpful too. It could be good to have a course with many grammar challenges, or a game-like courses where a certain number of questions are posted each week to challenge the students (Source: non-native teacher in a Western country).
- The number of participants would increase if the courses had supporters, as students are not good at self-study and the support and teachers are very important in this region. (Southeast Asia)
- Systematic learning materials quickly become obsolete and out of date. If educational materials are to be created at universities, it would be desirable to have a system that can be updated in real time.

(2) Information Dissemination on Learning Materials

- It is important to publicize information in a casual manner. Websites should not be designed by Japanese people for Japanese people, but should be constructed in a casual manner so that people can access necessary information.
- Online learning materials are too scattered, and unless there are guides that indicate which learning materials are good for what kind of situations, some people may not know what is necessary for themselves.
- It would be better if various materials are centralized and can be accessed in a format that is easy-to-read.
- Joining a fan page or group page on Facebook to publicize events would be a good idea.
- It would be effective to cooperate with speech contests and events held in various countries for a fee.

(3) Exchange Events

- Exchange events could be a motivation for learning. It would be good to have an exchange program that is not a one-time event, but something that is connected to Japanese language study and helps students build relationships.
- Current university students should support overseas students in their study by holding online exchange meetings with them in the form of tutors, so that the students overseas can feel closer to the university.
- It would also be helpful if Japanese students organize talk events at their universities.

(4) PR and Information Dissemination

- Showing how to study abroad, what kind of preparation is necessary before studying abroad, and what kind of career path can be built by studying abroad would be helpful for students overseas.
- Not many people are aware of the existence of study abroad fairs and Study in Japan websites for each region. Promoting studying abroad in Japan through YouTube and other platforms where young people have access to information would be effective.
- Those who want to study in Japan only seem to get information through word-of-mouth from teachers. Many people start out with no information at all, so it would be helpful if they could go to study abroad fairs and find out what they want to study and where they will be accepted.
- Providing information on scholarships in the local language is desirable.
- Approaching educational institutions and teachers may also be effective since

recommendations from teachers that learners trust are considered to be effective. It is also a solid approach to ask seniors students who have returned to their home countries to provide information to junior students.

- A famous YouTuber in South India, who has created Japanese language content, has created a network that loosely connects YouTubers in India. Inviting such people or joining their network to promote projects would be effective.

(5) Providing Information on Living in Japan

- It would be helpful to provide information in the local language on how people with various religious restrictions could live in Japan.
- The “Welcome to My Japan!” section of “Activate Your Japanese!” is very popular. If there were a university version of this content, it would be good for prospective students to know what kind of life they can expect in Japan.
- It would be good to have contents that show what kind of daily-life experiences students can have if they study in Japan (e.g., a day at a part-time job, shopping at a convenience store, walking in the neighborhood park, taking out the trash, etc.). Not only the students, but also their parents and teachers who send them off will be able to get an idea of what the experience would be like.

(6) Others (e.g., provision of study opportunities tailored to each country's circumstances)

- In Indonesia, a program called “Merdeka belajar” (independent study) has started, which requires students to spend about one year of the four-year university system at an internship or study abroad. It would be ideal to have study abroad programs at Japanese universities offered in a way that is compatible with such programs.
- In Canada, the number of people who want to study abroad for a year has been decreasing in recent years since many students do not want to delay their graduation. Due to this, many people prefer short-term programs of about 3 months.

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