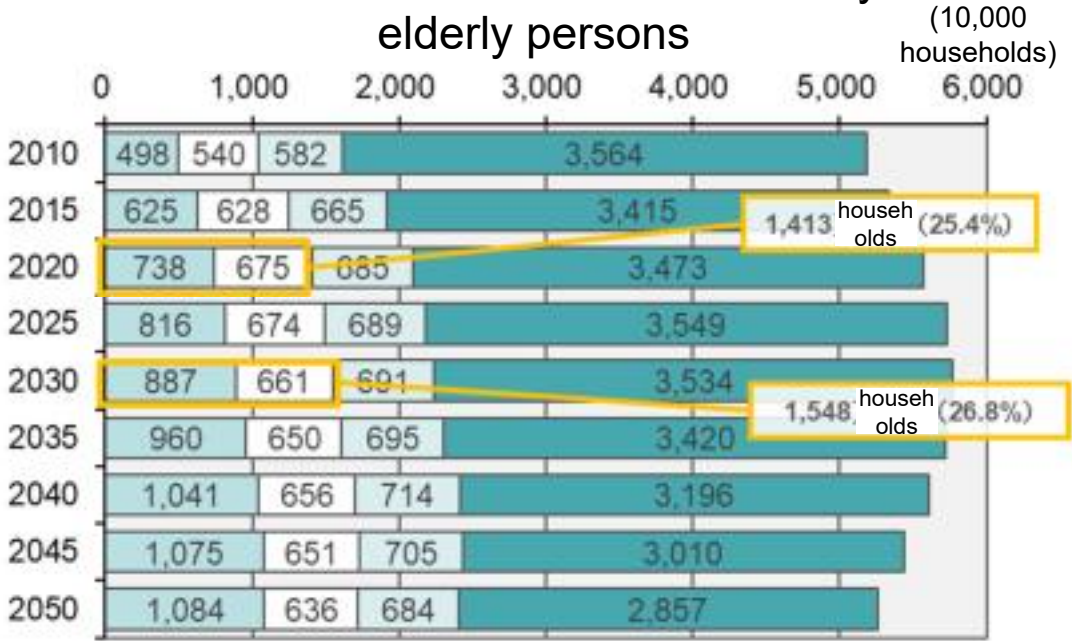


Trends in Households (Elderly Households and Single Elderly Households)

- The number of elderly households is expected to increase and exceed 15 million in 2030.
- Single-person households currently account for nearly 40% of all households (approximately 21 million households) and are the most common household types and are expected to continue to increase.

Number of households headed by elderly persons

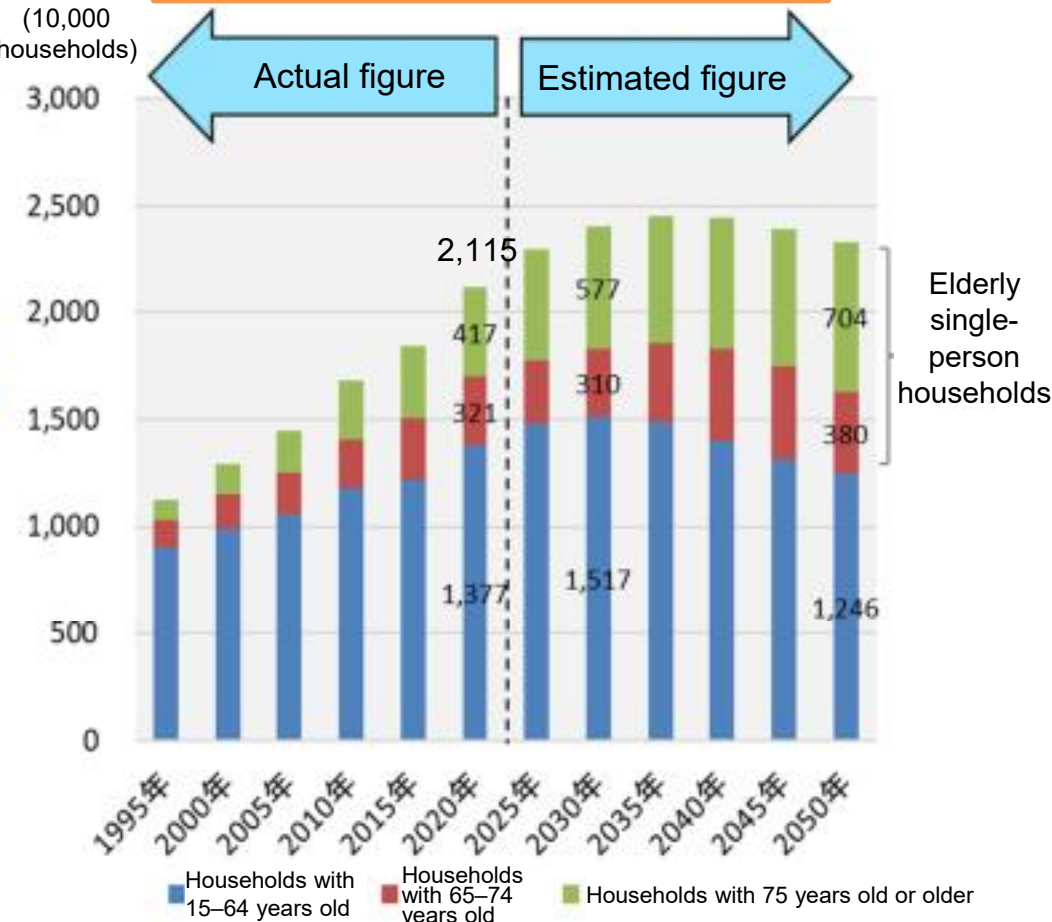


(Year)

■ Elderly single-person households
■ Elderly husband-wife households
■ Other households where its head is elderly
■ Other households where its head is younger than 65 years

Source: Prepared by the Ministry of Land, Infrastructure, Transport and Tourism based on "Future estimation of number of households in Japan (national estimation)" (estimations in 2013, 2018 and 2024) by the National Institute of Population and Social Security Research

Single Person Households by Age

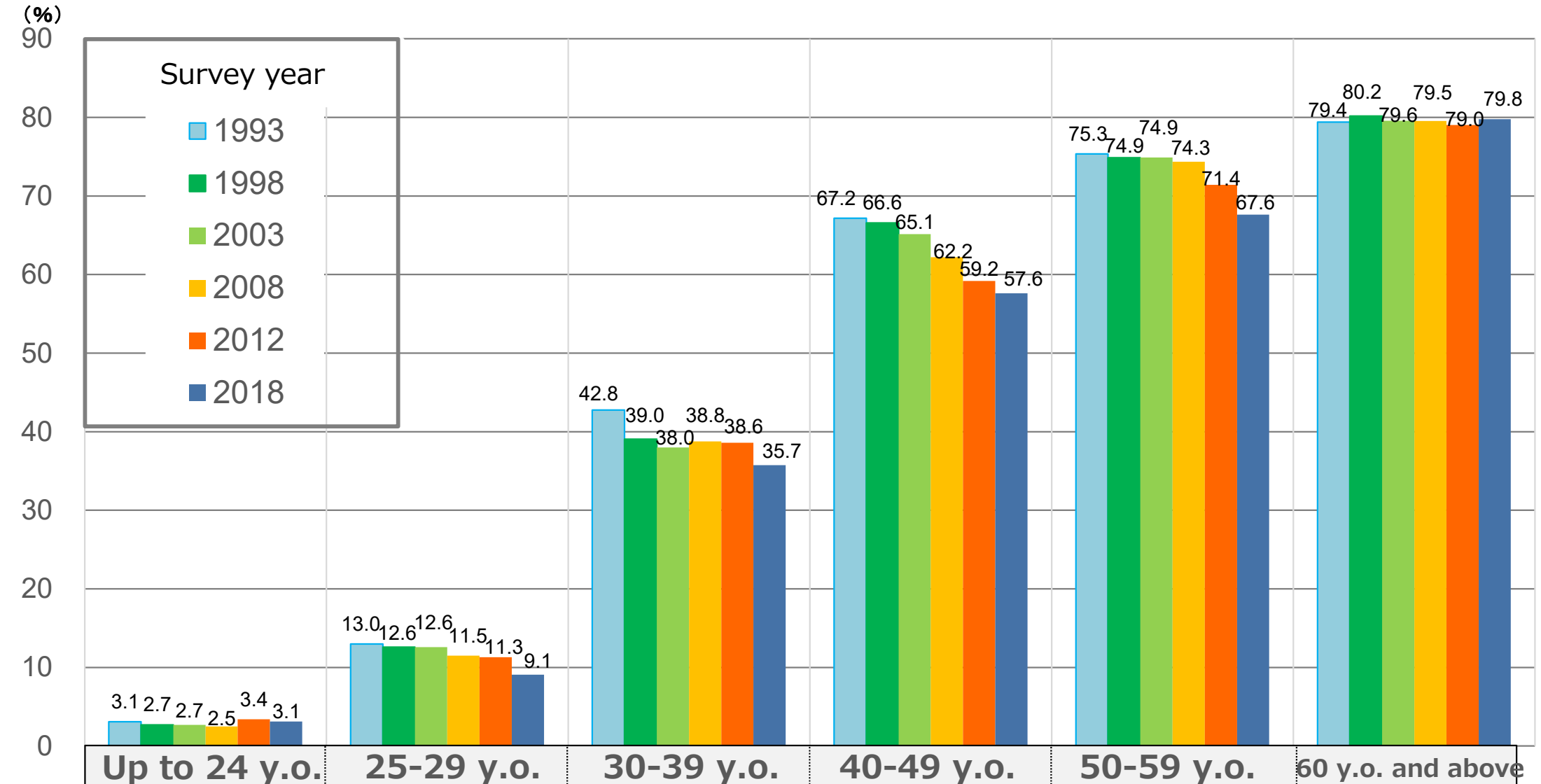


Source: Prepared by the Ministry of Land, Infrastructure, Transport and Tourism based on "Future estimation of number of households in Japan (national estimation)" (estimations in 2013, 2018 and 2024) by the National Institute of Population and Social Security Research and "The National Census" by the Ministry of Internal Affairs and Communications

Owner-occupied house rate by age group

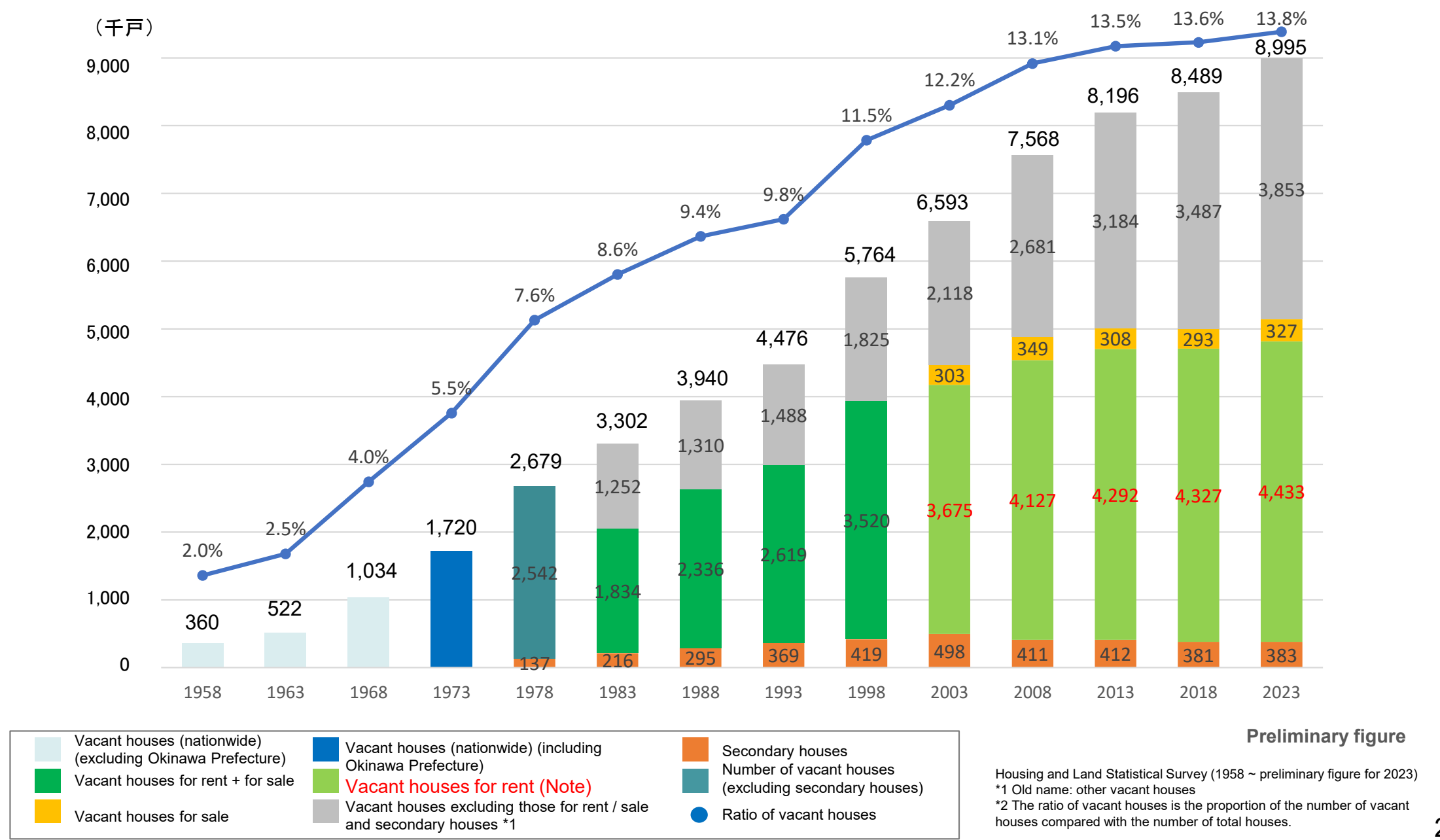
○ Owner-occupied house rate has been declining in recent years among those in their 20s to 50s.

50s : 74% (2008) → 68% (2018)
40s : 62% (2008) → 58% (2018)
30s : 39% (2008) → 36% (2018)
25-29 y.o. : 12% (2008) → 9 % (2018)



Number of vacant houses and vacancy rate

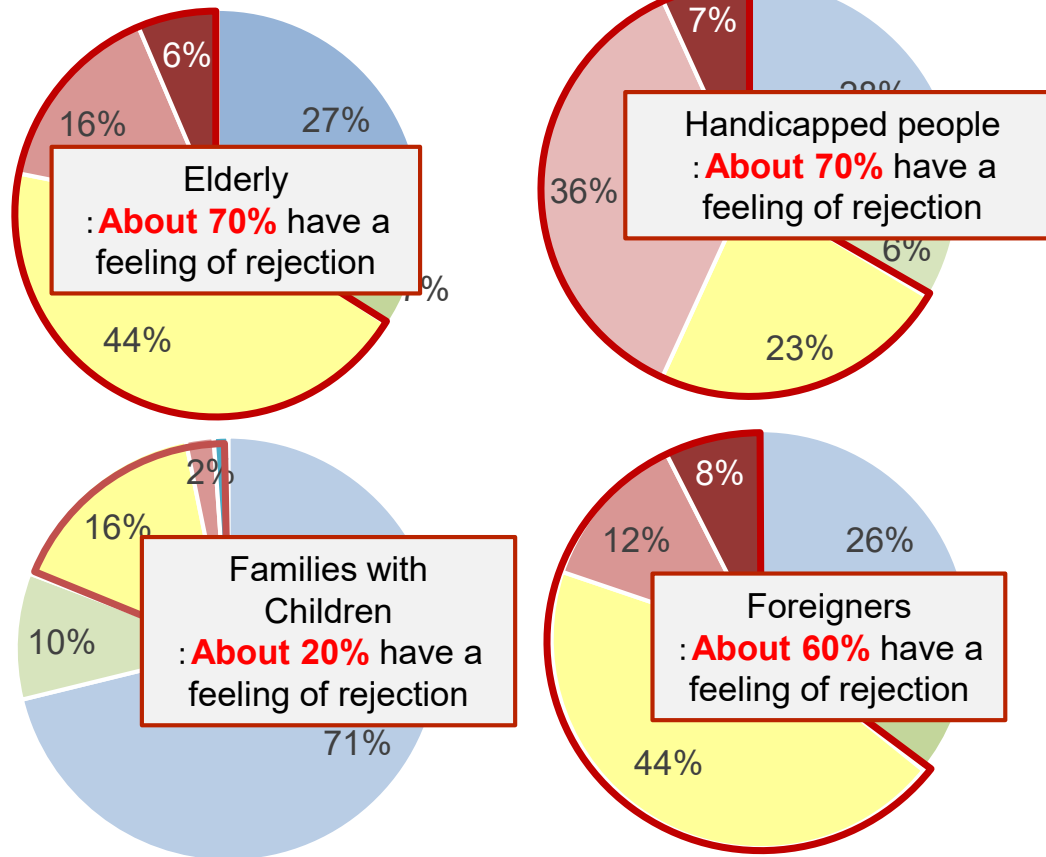
The number of vacant houses nationwide is approximately 9 million, of which approximately 4.43 million are vacant houses for rent (of which approximately 3.94 million are apartment buildings).



Landlords' Views on persons requiring housing support & Occupancy Restrictions

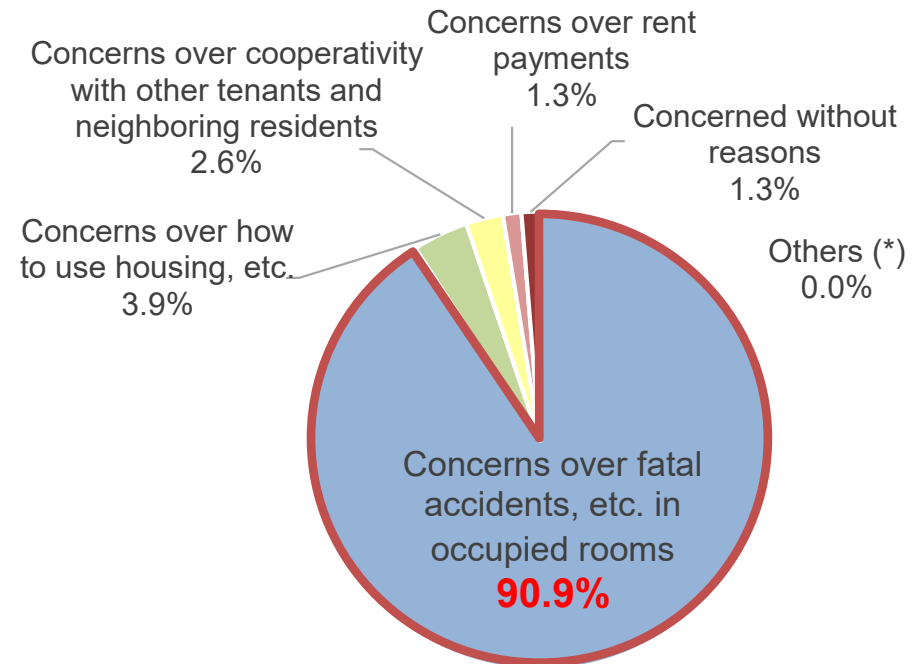
- Some landlords are reluctant to rent to people with special housing needs.
- When asked about the main reason for restricting occupancy, about 90% of landlords cited concerns about fatal accidents for elderly tenants.

[Lessors' (landlords') attitudes towards renting to people with special housing needs]



[Reasons for lessors' (landlords', etc.) restrictions on occupancy]

(Example) For **elderly people** (select the most appropriate reason for housing restrictions)



- * Other options were as follows (no one selected):
- Anxiety about changes in living environment due to new residents with different attributes than the main resident
 - Anxiety about people other than residents coming and going
 - Anxiety about different customs and languages
 - Anxiety about different life cycles

Source: FY2021 Ministry of Land, Infrastructure, Transport and Tourism survey

* Members of the Japan Rental Housing Management Association (public interest incorporated foundation) who are involved in the rental housing management business.

Organizations that have restrictions on occupancy were asked to answer the most relevant reason for the restrictions based on the attributes of their residents (Number of responses: 76 organizations)

Necessary Housing support measures when renting to persons requiring housing support

<Results of a questionnaire survey of real estate-related associations and other member businesses nationwide> (Number of responses: 1,988)

Household attribute	Necessary housing support measures (multiple answers)						
	Providing information on properties that will not refuse tenants	Rent Debt Guarantee Information provided	Contract Procedures support	Monitoring and daily life support	Consultation for moving-in trouble	Money and property management	At the time of death Disposal of remaining belongings
Elderly single person Household		49 %		61 %			61 %
senior citizen Only households	32 %	48 %		58 %			50 %
Households with Handicapped Person	42 %	32 %		60 %	48 %		
Low income Household	37 %	61 %		31 %	38 %	37 %	
Single Parent Household	37 %	52 %		42 %	35 %		
Childrearing Household	38 %	43 %		33 %	47 %		
foreigner Household	43 %	45 %	44 %		76 %		

Source: FY2019 Ministry of Land, Infrastructure, Transport and Tourism survey

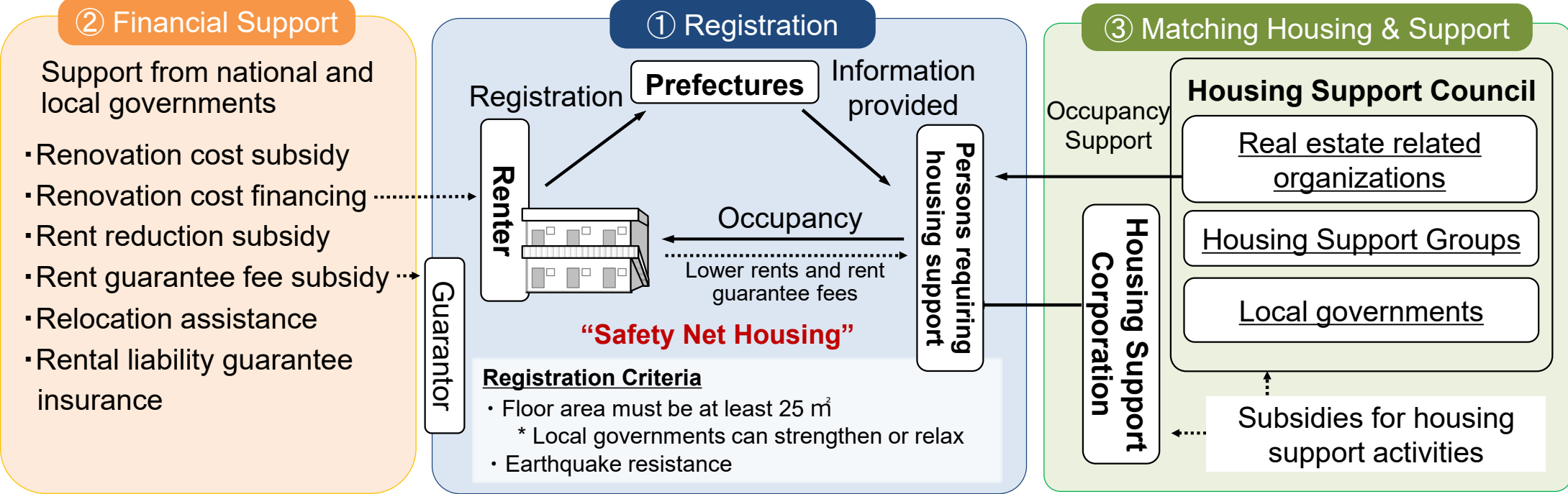
Housing Safety Net System (current)

① Housing registration system for persons requiring housing support

② Financial support

③ Matching and housing support for persons requiring housing support

[Image of the Housing Safety Net System]



Number of municipalities with subsidy systems

- Renovation cost subsidy : 39
- Rent reduction subsidy : 57
- Rent guarantee fee subsidy : 30

(as of the end of August 2024)

Number of registered units : 943,143

Of these, private housing (housing only for people requiring housing support): : 6,624 units

(as of the end of March 2025)

- Number of designated housing support organizations : 1,029 organizations
- Establishment of housing support councils : 155 councils

(47 prefectures and 117 cities, wards, towns, and villages) (as of the end of March 2025)

Overview of Housing Support (Current)

Housing Support Corporation

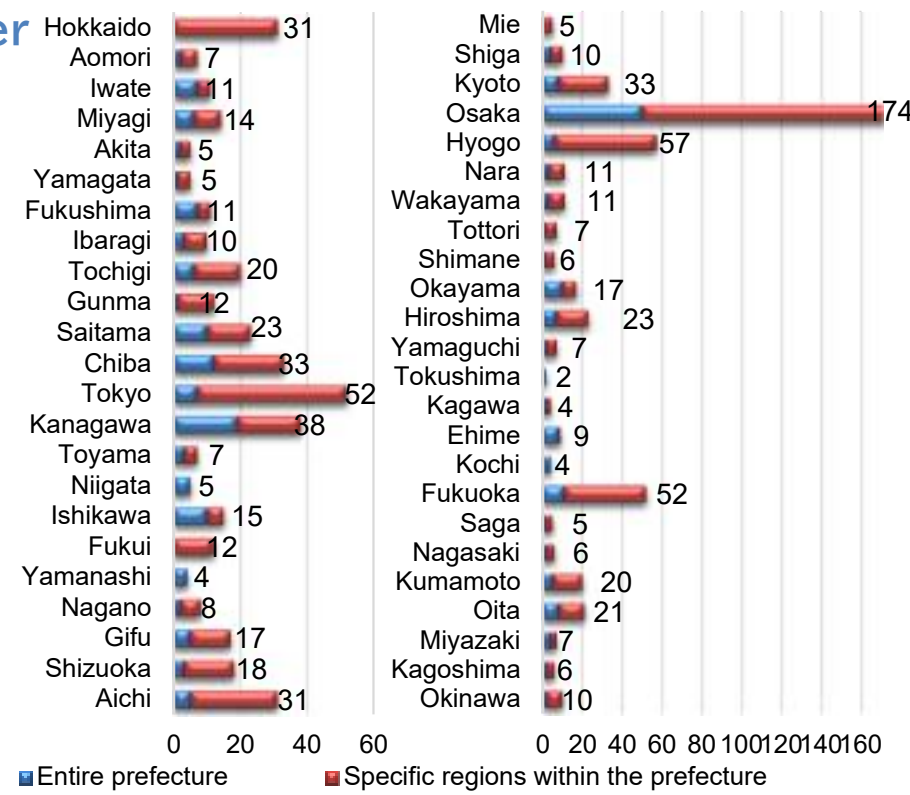
Designated by prefectures as a housing support provider for persons requiring housing support

Responsibilities:

- ① Rent guarantee for tenants of registered housing
- ② Housing consultations and other related matters regarding rental housing
Providing information and consultation for smooth move-in
- ③ Support for the daily lives of people who require special care, such as by providing supervision
- ④ Business related to ①~③

Designated: 1029 corporations (as of the end of March 2025)

■ By prefecture



Housing Support Council

To support persons requiring housing support, local governments, real estate agencies, and housing organizations will form a housing support council.

Major Activities of the Housing Support Council

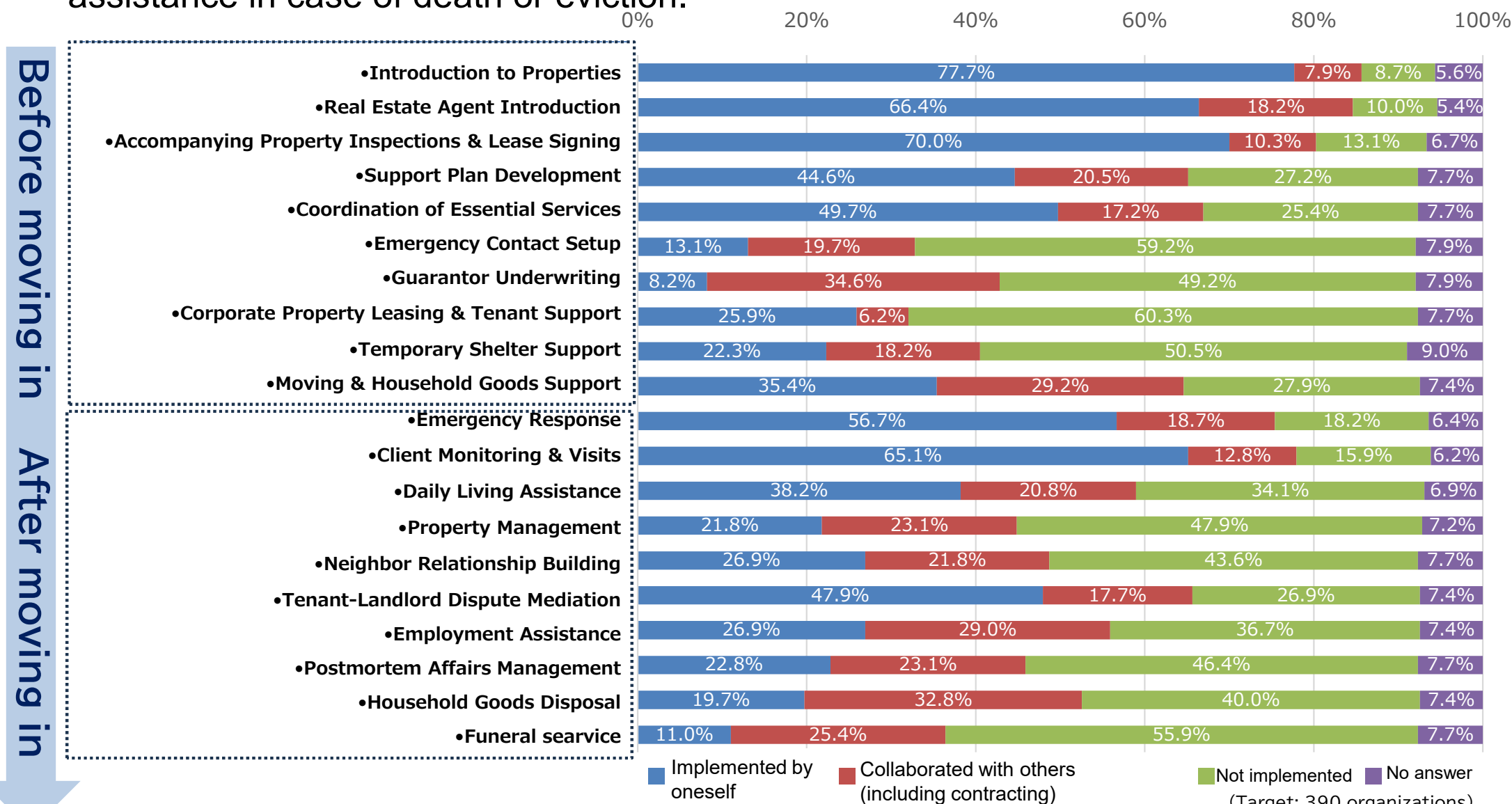
- Meetings for discussions and information exchange
- Collaboration with real estate and welfare organizations
- Housing consultations and property introductions
- Rental guarantees and safety confirmation services

Status: 155 councils (all prefectures, 117 cities , towns, and villages as of the end of March 2025)



Support provided by housing support organizations

- Many housing support organizations offer advice, property introductions, and connect with real estate agents.
- We collaborate with others to provide rent guarantees, employment support, and assistance in case of death or eviction.



Reviewing the Housing Safety Net System

Background and Necessity

The demand for housing for persons requiring housing support is increasing, particularly due to:

- Rising number of elderly, single-person households.
- Growing need for smooth entry into rental housing.

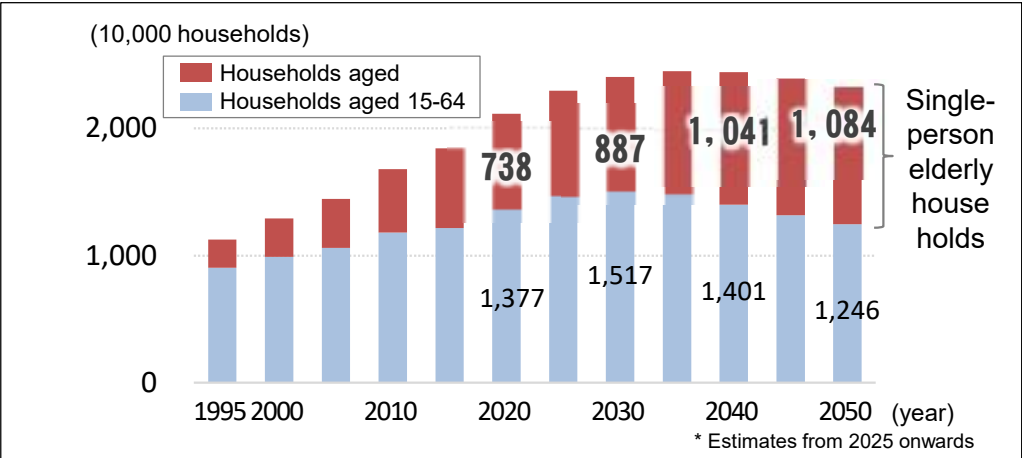
Challenges:

- Landlords are often reluctant to rent persons requiring housing support, such as elderly tenants, due to concerns over issues like lonely deaths and disposal of belongings.
- On the other hand, there are about 9 million vacant houses nationwide, with 4.43 million vacant in 2023 (Housing and Land Survey).

Progress:

- The revised Housing Safety Net Act (2017) supports over 1000 housing organizations nationwide, with increasing numbers offering residential support services, including property introductions and post-move-in supervision.

[Trends in the number of single-person households]



[Landlords' refusal to allow for persons requiring housing support into their homes]



1. Developing a market environment where both landlords and persons requiring housing support can use the property with peace of mind.
2. Promoting the supply of rental housing in which residential support is provided.
3. Strengthening local housing support systems that coordinate housing and welfare measures.

Develop a market environment that makes it easier for landlords to offer rental housing and allows persons requiring housing support to move in smoothly

Landlord's concerns

Challenges in Rental Properties After a Tenant's Death

- **Remaining Items :**
If items are left behind or tenancy remains, the room cannot be rented to the next person.
- **Accidental Property Issues:**
If a tenant dies alone, it may turn into an accidental property, leading to complications.

- **Non-Payment of Rent:**
Concerns arise if the tenant fails to pay rent, and there's no contact person for assistance if the tenant has no family.
- **Potential Issues:**
Risk of conflicts with other residents when accommodating individuals with special needs.

Housing Safety Net Law, Senior Citizens Housing Law, Japan Housing Finance Agency Law

① Promote a system whereby “lease contracts are not inherited.”

Risk at the time of death

Simplify the approval process for lifetime building leases

- ※A lease that is not renewed until the death of the lessee and terminates upon death (not inherited by the heirs).

Risk at the time of death

② Spreading the “no need to dispose of leftover materials” mechanism

In order to facilitate the disposal of objects left behind in the event of a resident's death, the following was added to the duties of the residential support corporation

③ Creation of a mechanism to “avoid problems with rent arrears.”

Risk during the tenancy

Certified Rent Guarantors for People with Disabilities

•Certification by Minister of Land, Infrastructure, Transport, and Tourism

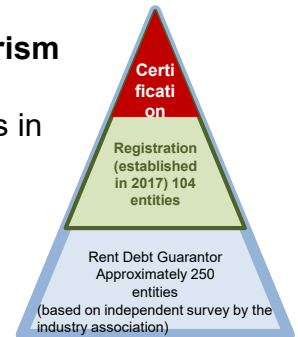
•Criteria:

- Guarantors provide rent guarantees for people with disabilities in supportive housing.
- Emergency contacts are not limited to family members.

•Benefit:

- Reduced guarantee risk through Japan Housing Finance Agency's Rent Obligation Guarantee Insurance.

Rent Debt Guarantor Image



④ Creation of housing that “can cope with changes and problems after occupancy”

Risk during the tenancy

Risk at the time of death

Landlords may refuse consultations, viewings, and contracts due to risks they cannot manage.

Promote the supply of rental housing in which housing support corporations, etc. provide support during occupancy

Residential support corporations, etc., in cooperation with landlords, (1) Daily safety confirmation and monitoring (2) Establishment of housing (residence support housing) that provides a link to welfare services in the event of instability in living or mental or physical conditions.



<Current> Safety Net Registered Housing: Provide housing to those in need by “not refusing landlords” and “publicizing information about their properties.”

“Housing with Residential Support”

Provide housing for people with special needs through a housing support corporation, or other support providers

(1) Safety confirmation by ICT, etc.



Persons requiring housing support



Landlords

Collaboration

(1) Safeguarding through visits, etc.

Housing Support Corporation, etc.

In case the life or the condition of mind and body for persons requiring special assistance becomes unstable

(2) To coordinate with welfare services



Persons requiring special assistance

Housing Support Corporation, etc.

- The head of municipalities, etc. make a certification based on the joint ministerial order by the Ministry of Land, Infrastructure, Transport and Tourism and the Ministry of Health, Labor and Welfare.
- To accelerate the supply by subsidizing renovation expenses, etc. (budget for FY2024)

Special case

In principle, an approved guarantor (see 1.) underwrites the rent obligation guarantees for the tenants with special needs

Social Services (Example)

Self-Reliance Counseling and Support Organizations Welfare office

Low-income earners

- Support for understanding household finances and improving motivation.
- Employment support, use of public assistance



Welfare for the Elderly Consultation

Elderly

Home help, day service



Welfare Office
Employment and independent support Center

Single Parent

- Counseling and advice
- Lifestyle guidance and learning support for children



Core Consultation Support Center

Disabled Person

- Home help, day service
- Employment support



When specialized welfare support is required, connect to related organizations that implement welfare services according to the characteristics of the person in need.

Strengthening Local Housing-Welfare Collaboration

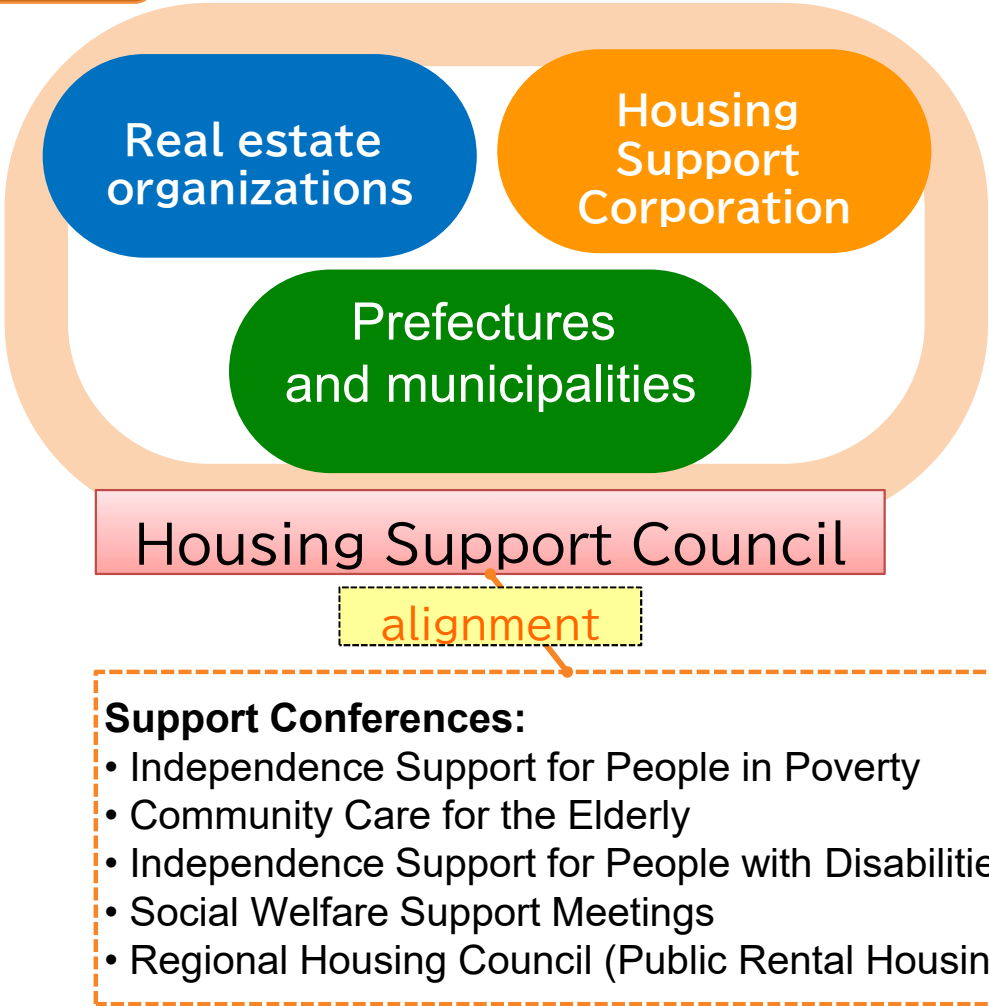
Joint Guidelines by the Ministers of Land and Health

Promoting Housing Support Councils by Municipalities

Jointly managed by
Ministry of Land, Infrastructure,
Transport and Tourism and
Ministry of Health, Labour and
Welfare

About the Housing Support Council

- Promote the establishment of housing support councils by municipalities (Obligation to make an effort)
- Develop a comprehensive, inclusive housing support system, with collaboration across housing and welfare, covering consultation, pre-move, move-in, and move-out support.



Housing Support System that Integrates Housing and Welfare (illustration)

Creation of a housing environment that integrates housing and welfare using vacant houses/rooms and local resources (illustration)



Support system for safety net housing and residential support housing

To ensure stable housing for all, we will strengthen the housing safety net by supporting relocation, reducing renovation costs, and lowering rents for support housing.

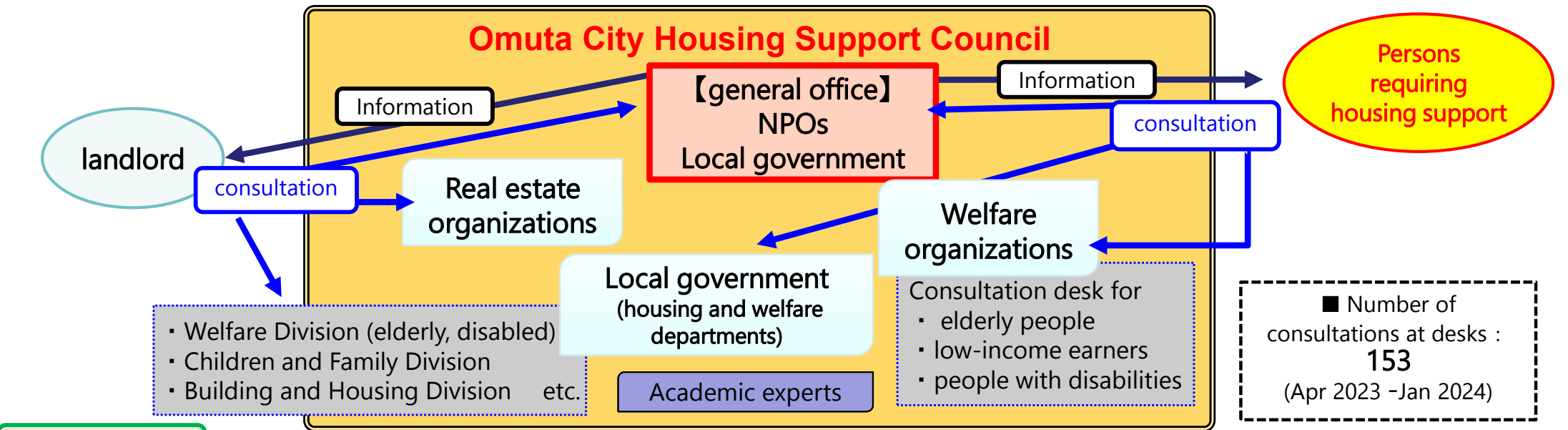
	Subsidy for repair costs		Subsidies to lower the rent	Rent guarantee fee, etc. Subsidies for lowering costs	Safety net housing Subsidy for moving to
Responsible entities	Landlords, local governments, etc.	Responsible entities	Landlords, local governments, etc.	Rent guarantee companies, Insurance companies, local governments	Housing support corporations, housing support councils , local governments , etc.
Works in scope of subsidy	① Barrier-free renovation work ② Earthquake-resistance renovation work ③ Share house construction ④ Floor plan change work ⑤ Renovation work to accommodate families with children (including work to establish childcare support facilities) ⑥ Fire prevention and extinguishing measures ⑦ Construction and renovation of exchange space ⑧ Energy saving renovation work, etc. ○ Installation and renovation of safety confirmation equipment ○ Soundproofing and sound insulation work * Raise the upper limit for housing rental costs required during the consideration and implementation of renovation work under certain conditions. * Renovations to convert registered private housing into residential support housing are also eligible for subsidies.	Households in scope of subsidy	In principle, households with a monthly income of 158,000 yen or less Families with children and newlyweds: Monthly income of 214,000 yen or less Large families: Monthly income of 259,000 yen or less Previous public housing scheduled for reconstruction or demolition Residents etc.: Monthly income of 214,000 yen or less 40% income bracket	In principle, households with a monthly income of 158,000 yen or less Families with children and newlyweds: Monthly income of 214,000 yen or less Large families: Monthly income of 259,000 yen or less However, this does not apply when it is difficult for the person reducing the rent guarantee fee, etc. to ascertain the tenant's income and the rent amount is below the public housing rent amount.	In principle, households with a monthly income of 158,000 yen or less and either ① or ② below 1) Moving from areas with high disaster risk ② Moving to low-rent safety net housing (in principle only if the rent is reduced)
		Target of price reduction	rent	Rent guarantee fee Insurance premiums for lonely deaths and left behind belongings Costs for assuming emergency contact information	Costs of moving to safety net housing
Subsidy rate ・National funds Limit	National 1/3 (Subsidy through local governments: National 1/3 + Local 1/3) 500,000 yen/ household (If a childcare support facility is also established in (5), 10 million yen per facility)	Subsidy rate ・ funds Limit	Country 1/2 + Region 1/2 etc. 20,000 yen/household/month etc.	Country 1/2 + Region 1/2 30,000 yen/household Total national funding: 2.4 million yen/household	Country 1/2 + Region 1/2 50,000 yen/household
		Target Housing	Private Residence /Supported Living	Registered housing, private housing, residential support housing	
Housing in scope	Private Residence Supported Living	support period	10 years Relaxation in the following cases ① It can be extended for a period determined by local governments within the total amount of national funds. ② For former residents of public housing scheduled for reconstruction or demolition, extensions are possible every	-	-
management Requirements	managed as a private residence for 10 years or more. However, if certain conditions are met, such as recruiting new residents after the first resident moves out, but no new residents move in for two months, the requirement may be relaxed (indirect assistance).				

Appendix: Good practice

Comprehensive and inclusive housing support in the community (Omuta City)

Overview

- The members of the housing support council collaborate to provide comprehensive support, from consultation before moving in to life support (checking safety, etc.) while residing using the support network.
- The housing support council provides consultation not only to persons requiring housing support, but also to landlords



Support

The collaboration of housing and welfare related parties promotes tenancy (support in securing housing) and stabilization of daily life of persons requiring housing support by providing consultation services, matching to services and housing, contract support, and residential support.

Development of Regional resource t and environment related to housing

- Hold workshops and other events attended by various professions from public and private sectors, to built "face-to-face relationships."
- Register housing data offered by vacant owners in the information system.
- Secure shelters, and establish a system where counselors from welfare organizations can respond quickly. e.g. DV, abuse
- Identify the reasons behind consultations about securing housing, and not only respond to themselves but also connect to relevant organizations to provide detailed consultation and support.

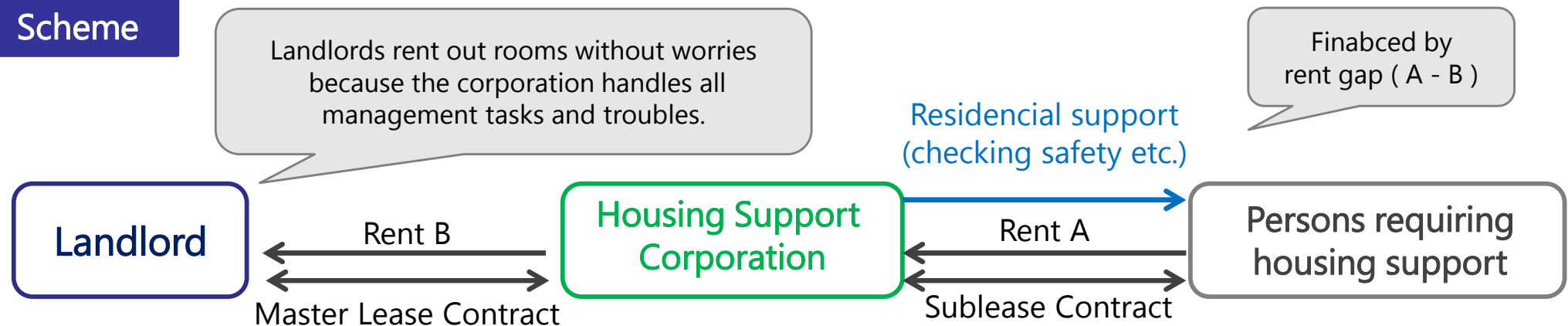
General Information※	
Population	106,974
Number of elderly people	40,440 (37.8%)
Number of elderly single-person households	15,203 (27.4%)

※ Basic Resident Statistics (October 2023)

Providing housing and support together through a sublease system

- "Safe Housing Project" : The housing support corporation searches for housing that meet tenants' requiring, negotiates with landlords, and rents each room to subleases.
- Provide support such as checking resident's safety using IoT devices during occupancy by using the subsidies and defference in rent.

Scheme



Property

The corporations match the wishes of persons requiring housing support with properties which no tenants can be found.



Example Property

Number of occupants : 105 units (As of 2024)

Support details

- Consult through consultation desks.
- All rented houses are equipped with 24- hour checking systems and automatic fire extinguishing devices.
- After moving in, a checking service will be implemented using sensors and regular visit.
- Work with various related organizations when caregiving or nursing by utilizing tips as social welfare corporations,
- Provide various support for daily life. e.g. Moving assistance and applications to government agencies, etc.

Providing support using existing networks of private companies

Delivery service company

- One delivery company nationwide provides residential service using its existing network.
- Since the company has a **nationwide home delivery network door to door**, it knows the location of individual homes and can visit residences on a regular basis.
- In the service, **Light bulb-type sensors** are installed in the home in advance to check how often and when light bulbs are turned off and on (by using IoT technology).
If the company detects unusual situations of the residences through the sensors, **a delivery worker visit to the residents on behalf of their relatives** who lives far away.

