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SPORT FOR every one

White Paper on Sport in Japan 2017

SASAKAWA SPORTS FOUNDATION

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Foreword

The Sasakawa Sports Foundation (SSF) was established in March 1991. Since the establishment, SSF has implemented a wide range of activities such as survey research, grant programs, and international cultural exchange in order to promote the enjoyment of sports by "anyone, anytime, anywhere".

As Japan has faced the declining birthrate and the aging society, the public awareness about the importance of sports and healthy lifestyles has increased. Despite this fact, over the past ten years, the number of people who are unaccustomed to playing sports has remained steady at five out of ten. SSF believes that it is our responsibility to change this shocking statistic while helping create a healthy, dynamic environment for everyone, the mission of SSF.

The first decade of the 21st century has now gone and we have begun to see a push toward new sports policies by the government. SSF celebrated its 20th anniversary amid the ongoing changes, and has decided to enhance the research function, which compiles and analyzes a wide variety of survey data. We are thus able to proactively propose governmental policy on local and national levels and propose programs to sports organizations. In addition, we are also able to develop and implement programs that embody our vision of sports in the future.

SSF will continue promoting the firm establishment of "Sport for Everyone," a philosophy that aims to create a happier, healthier society, with the ultimate goal of enriching the athletic lives of each individual and creating an environment in which people can continue enjoying sports in their own ways.

Finally, this book would not have been possible without the contributions and support of our advisory board and authors. I would like to thank them and acknowledge their outstanding work.

Kazutoshi Watanabe
President, Sasakawa Sports Foundation
October, 2017

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As of October, 2017

Chapter 1
Sports Policy

I. The Acts on Sports

1. The Basic Act on Sport

In June 2011, the Basic Act on Sport was enacted with the comprehensive revision on the Sport Promotion Act for the first time in 50 years. The Act consists of 35 articles and supplementary provisions, and declares in the preamble that "Sport are a universally shared human culture." It defines sport as athletic competitions and other physical activities performed by individuals or groups for the purpose of "sound development of mind and body", "retention and promotion of health and physical strength", "acquisition of mental satisfaction", and "cultivation of the spirit of self-sufficiency or other mentalities". Furthermore, the Act defines sport as "crucial for citizens to lead a healthy and fulfilled life in terms of mind and body throughout their lifetime", and clearly states that living life happily and fruitfully through sports is the right of all citizens.

The Act also states that sport not only have an impact on individuals, but can also develop a sense of unity or vitality of an area, and contribute to recovery of the regional society. It places an emphasis on the importance of Japanese sport players achieving the great success in international competitions. In addition, the Act identifies sport as a key element in the improvement of the international status of Japan. It states that sport can create vitality in our society, contribute greatly to the development of the national economy, and promote global mutual understanding through international exchange, which will contribute greatly to international peace.

The major provisions of the Basic Act on Sport that have been newly established or revised, are as follows:

- Paragraph 5 of Article 2 (Basic Principles) prescribes the promotion of sport for people with disabilities, stating that "sport shall be promoted with due consideration according to the type and degree of disability so that persons with disabilities can play sport voluntarily and proactively." Articles 3 and 4 clarify the responsibilities of the national government and local governments, respectively.
- Under Article 5, sport organizations must "protect the rights and interests of those who play sport", "ensure transparency of

management", and "endeavor to resolve disputes concerning sport in a prompt and appropriate manner."

- Under Article 9, the Act requires the Minister of Ministry of Education, Culture, Sports, Science and Technology (MEXT) to formulate a "Sport Basic Plan", and Article 10 requires local governments to formulate a plan concerning the promotion of sport (a "local sport promotion plan") making allowance for the Sport Basic Plan and in the context of the actual situation in the area.
- The roles to be played by the sport industry are also defined in Article 18, mentioning the importance of coordination and cooperation between sport organizations and business operators for dissemination of sport and improvement at competition level.
- With regard to sport for people with disabilities, Article 26 states that in order to ensure the smooth holding and operation of the National Sports Games for Persons with Disabilities, necessary support should be provided to Japanese Para-Sports Association and to the prefectures of the venue.

Furthermore, Article 2 of the supplementary provisions refers to the establishment of a sports agency as the administrative organization that comprehensively promotes sports policies.

2. Sports Promotion Lottery Law

In 1998, in order to secure financial resources for sports promotion, the "Act on Carrying Out, etc. Sports Promotion Vote" (commonly known as the "Sports Promotion Lottery Law") was enacted through legislation drafted by the nonpartisan Federation of Diet Members for Sports. One of the reasons for the enactment of this Act was the necessity for structural reforms in the sports system. Japanese system had relied on public funds and funding from private companies, and has now been suffering from the declining birthrate and aging, as well as the impact of a prolonged slowdown in the economy. Article 21 of the Act specified how lottery revenue should be used and allocated to local government bodies and sports organizations.

The allocation of subsidies from the Sports Promotion Lottery is determined in accordance with the "Basic Policies for Subsidies from the Sports Promotion Lottery Profits" formulated by MEXT. An amount equivalent to 50% of lottery ticket sales is used as prize money for winners, then two thirds of the remaining profit (after deducting management expenses) is used as subsidies for the promotion of sports, while the remaining one third is paid to the national treasury.

In May 2013, the Act on the Sports Promotion Lottery was partially revised to expand the type of football matches that could be bet on (which had previously been limited to the Japan Professional Football League "J. League"). The Act now allows betting on football matches that are held by overseas professional leagues designated by MEXT such as the English Premier League, and the matches which conform to the standards specified by an ordinance of MEXT. A further revision in 2016 increased the ratio of lottery profits that are used as subsidies for local governments and sports organizations from one-third to three-eighths.

3. Act on the Japan Sport Council

Based on the "Act on the National Agency for the Advancement of Sports and Health (NAASH), Independent Administrative Agency" promulgated in 2002, NAASH was established in October 2003. NAASH succeeded to all activities previously allocated to the National Stadium and the School Health Center of Japan, such as the administration of school lunches, school safety and the operation of the National Stadium. In 2012, NAASH has changed its organization name to the Japan Sport Council (JSC) and the Act above is thereby called the "Act on the Japan Sport Council".

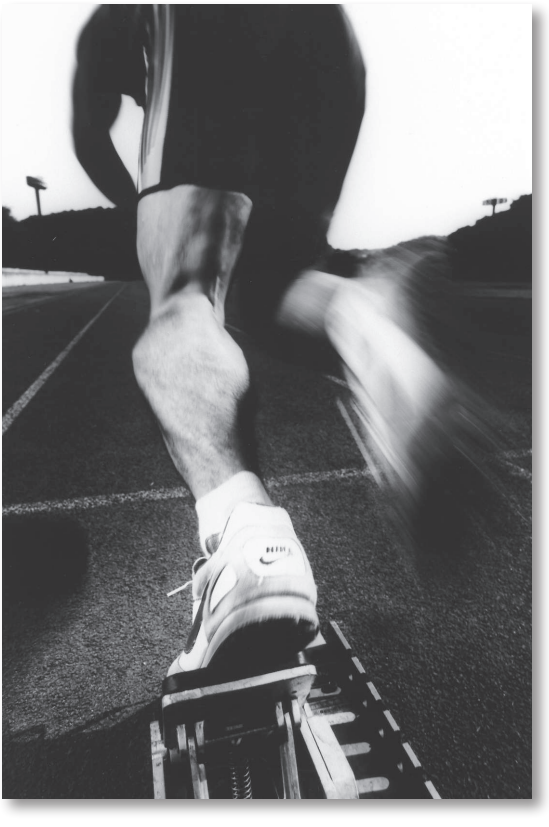
This law defined the purpose of establishing the JSC and the range of its activities; it was revised in 2013 to allow up to 5% of sales proceeds from the Sports Promotion Lottery overseen by the JSC to be applied to the costs of bidding on international sports events or to the maintenance of sports facilities required to host them. This limit was increased to 10% by a 2016 revision, and part of this is currently being used to develop the New National Stadium.

4. Act on Special Measures for the 2019 Rugby World Cup

In July 2009, Japan was selected to host the 2019 Rugby World Cup. In Addition to the event's national significance as well as its close connection to the preparation and management of the 2020 Tokyo Olympic and Paralympic Games, the "Act on Special Measures for Rugby World Cup 2019" were enacted in June 2015 to ensure that preparations for the event would go well and that it would be run smoothly. These measures include activities such as issuing charitable postcards and dispatching government officials to the organizing committee.

5. Act on Special Measures for the 2020 Tokyo Olympics and Paralympics

In September 2013, Tokyo was successful in its bid to host the 2020 Olympic and Paralympic Games. Considering the significant impact hosting the Olympics will have on Japan, the "Act on Special Measures for the 2020 Tokyo Olympics and Paralympics" were enacted in June 2015 to ensure that preparations for the event would go smoothly. These measures include activities such as issuing charitable postcards, dispatching government officials to the organizing committee, establishing an Olympic Promotion Office, and making government assets (the JGSDF Asaka Exercise Area, Kokyogaien National Gardens, and Kitanomaru Garden) freely available to use.



II. Sports Administration System

1. Sports Administrative Organizations

The promotion of sports in postwar Japan has been led primarily by administrative organizations such as MEXT (formerly the Ministry of Education, Science and Culture) and the Boards of Education in each local government as part of a larger educational administration system (Figure 1-1). MEXT has been responsible for wide range of policies, including those related to school sports and physical education, and activities of school

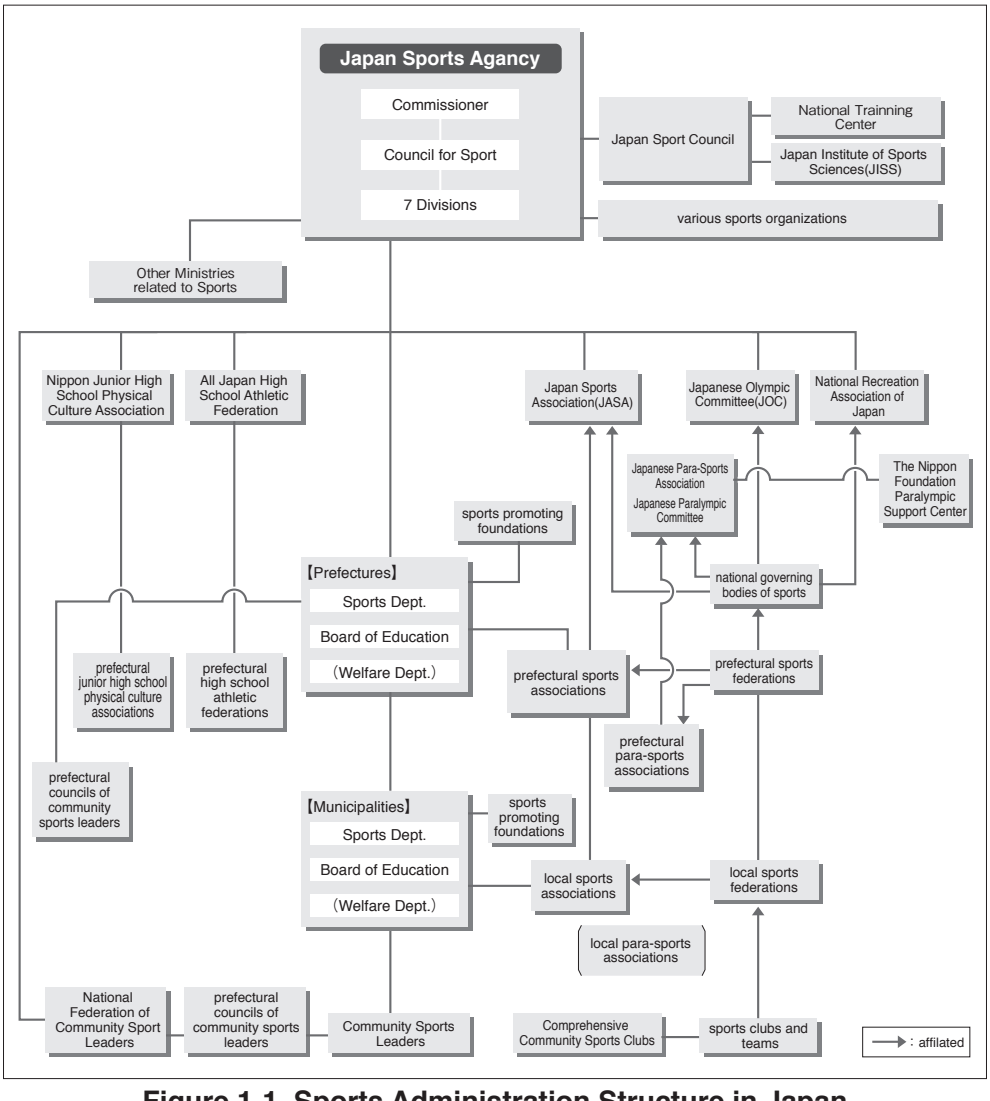


Figure 1-1 Sports Administration Structure in Japan

clubs as well as regional sports. They are also responsible for hosting and participating in international sports competitions such as the Olympics and Paralympics and the FIFA World Cup and enhancing high performance sports.

Professional sports are not under the direct jurisdiction of MEXT, however, the Nippon Professional Baseball Organization (NPB), the Japan Professional Football League (J. League), and the Japan Professional Sports Association were all once under the jurisdiction of MEXT and carry the influence of its methods of sports administration. At present, due to the reform of the public interest corporation system, these organizations are administered by the Cabinet Office. Moreover, many industries responsible for sports goods and equipment, leisure industries such as golf course, ski resorts and bowling alleys, and health service industries such as fitness clubs are administered by Ministry of Economy, Trade, and Industry (METI).

Furthermore, the Ministry of Health, Labour and Welfare (MHLW) administers several services including: businesses promoting health and physical strength in municipalities; long-term care and preventive services pursuant to the "Long-term Care Insurance Act"; events including the National Health and Welfare Festival for the Elderly ; promotion of sports and physical activities from the perspectives of fitness, health and social welfare. The Ministry of Land, Infrastructure, Transport and Tourism (MLIT) is responsible for the maintenance of sports facilities such as sports/multipurpose parks used for the National Sports Festivals, and the Japan Tourism Agency of MLIT is in charge of promoting sports tourism. As is seen here, a large number of government offices are involved in the promotion of sports.

Japan Sports Agency: The Leader of Sports Administration

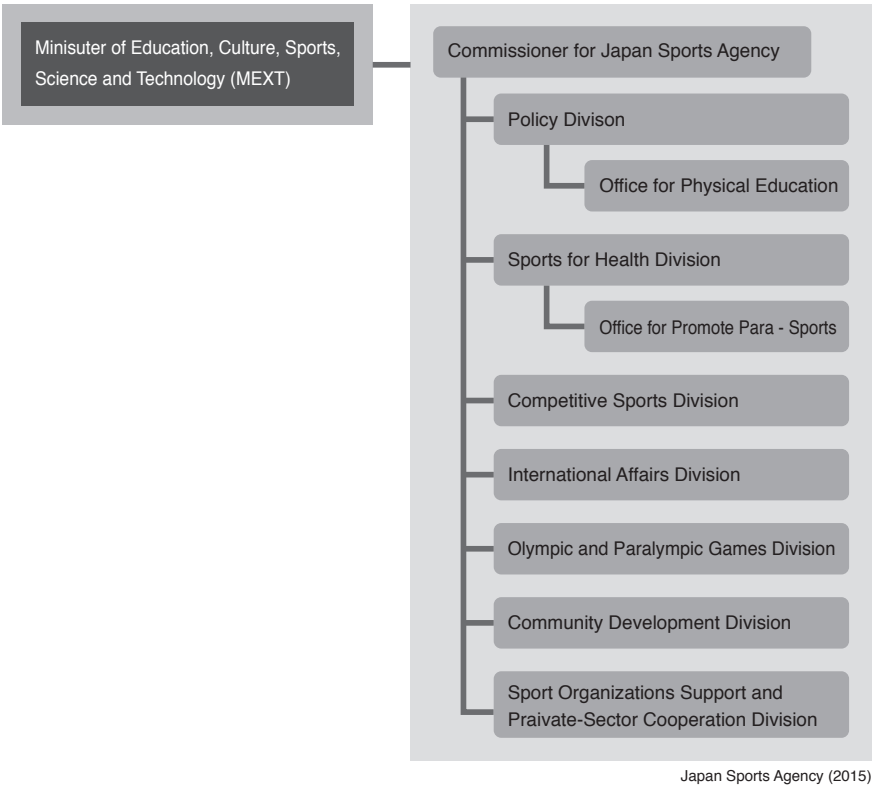
Sports administration in Japan involves a large number of ministries and government offices. In recent years, the expectation that a multitude of benefits can be achieved through sports has led to the comprehensive promotion of sports policies that span over several different fields, and the sports administration is expected to increase the effectiveness of those policies. In this context, "comprehensive review of the modality of administrative organization for promotion of the measures concerning sport" was stated in Article 2 under the supplementary provisions of the Basic Act on Sport enacted in 2011. Moreover, in September 2013, Tokyo was awarded to host the 2020 Olympic and Paralympic Games (Tokyo 2020), creating favorable conditions for the establishment of the Japan Sports Agency (JSA) in October 2015.

The JSA was created by expanding MEXT's Sports and Youth Bureau into an external bureau and is led by a commissioner, a deputy commissioner, a director-general, and a deputy director-general. The four divisions of the Sports and Youth Bureau were reorganized and expanded into the JSA's seven divisions (Figure 1-2). The number of personnel was also increased from 76 to 121, with 23 of the staff members being reassigned from other ministries or government offices.

Major renewal of division by establishing Japan Sports Agency

1. Transition from "Sports Promotion Division" to "Sports for Health Division"

A division was established for promoting health through sports by utilizing expertise on preventative medicine when popularizing sports and developing regional sports clubs. This division also promotes disability sports through its Office for Promote Para-Sports (although authority was transferred from the MHLW in 2014, prior to the creation of the JSA).



Japan Sports Agency (2015)

Figure 1-2 Organization Chart of Japan Sports Agency

2. Establishment of the International Affairs Division

Established as an expansion of the programs previously overseen by the Competitive Sports Division, the newly created International Affairs Division is responsible for international contribution via sports, as well as active participation in the global sports world by training and dispatching personnel.

3. Establishment of the Olympic and Paralympic Games Division

An Olympic and Paralympic Games Division was created to ensure the success of Tokyo 2020 by coordinating with the various sports organizations and promoting the Olympic Movement. This division will cease to exist once that event concludes.

4. Establishment of the Community Development Division

A new Community Development Division was created to oversee the creation of diverse locations where sports can be played and the vitalization of communities through sports.

5. Establishment of the Sports Organizations Support and Private-Sector Cooperation Division

A new Sports Organizations Support and Private-Sector Cooperation Division was created to oversee areas such as the improvement of sports organizations governance, training of sports personnel and coaches, support of athlete career paths, and promotion of coordination with industry.

Physical education and sports-club activities at schools, domains which were previously controlled by the Sports and Youth Bureau, are now under the Policy Division's Office for Physical Education. Control of policies that were overseen by other government agencies prior to the creation of the JSA have not yet been transferred to it. The JSA has come to play a central role in sports administration as it works to coordinate policies between the various ministries.

2. Major Sports Promotion Institutions in Japan

In addition to administrative organizations, a number of public interest corporations such as the Japan Sport Council (JSC), the Japan Sports Association (JASA), the Japanese Olympic Committee (JOC) and the National Recreation Association of Japan (NRAJ) play a significant role in the promotion of sports. Their roles include enhancement of high performance sports, provision of subsidies for promotional activities, and development of a better understanding of the value of sports.

The JSC strives to promote sports and improve physical health of school children through the following activities; management of sports facilities such as the Yoyogi National Gymnasium, construction of the New

National Stadium, conduct of various research projects at the Japan High Performance Sport Center, support for sports promotion through operation of the Sports Promotion Lottery, and payment of necessary benefits in the case of accidents that occur to students under the supervision of schools. The JASA, JOC and NRAJ preside over various sports associations such as sports organizations in the all 47 prefectures and are incorporated into the national administrative system which controls sports policies. These policies concern issues such as the improvement of Japan's international high performance, the training of sports instructors, and the development of regional sports clubs to enhance physical fitness for children.

The Japan Anti-Doping Agency (JADA) was established in 2001 as an institution to promote, educate and coordinate anti-doping activities in Japan. As a contracted party of the World Anti-Doping Code (WADA Code), JADA implements the Japan Anti-Doping Code which is consistent with the WADA Code. The Japan Sports Arbitration Agency (JSAA) also contributes to the promotion of sports through improving sports environments, encouraging athletes to compete fairly with one another and through other awareness-raising activities.

3. Sports Administrative Organizations in Local Governments

Sports Administrative Organizations in Prefectures and Municipalities

Until recently, the regional Boards of Education were principally in charge of all duties involved in sports administration for each prefecture and municipality. This was due to Article 23, item 13 (Duties and Authority of the Board of Education) of the "Act on the Organization and Operation of Local Educational Administration" (hereinafter referred to as the "Local Educational Administration Act"), which stated that the Boards of Education were to supervise and execute the operation of policies related to sports. However, under Article 4 of the Basic Act on Sport, it is now prescribed that "local governments are responsible for establishing and implementing measures concerning sport which are appropriate to the characteristics of the area voluntarily and independently, while maintaining coordination with the national government." Furthermore, because of the special provision added to the Local Educational Administration Act (Article 24-2, "Special Provision on Duties and Authority") after its partial revision in 2007, it has become possible for the heads of local public bodies to supervise and administer affairs related to sports that had been under the jurisdiction of the Boards of Education. As a result of this greater flexibility, administrative affairs have been transferred from the Boards of Education and been placed under the mayors or governors in many local governments.

As of October 2016, 24 prefectures out of 47 have placed the sports administrative department within their board of education, while 23 have placed the department within the governor's office. Among the 20 ordinance-designated cities[1] in Japan, only three - Sagamihara, Nagoya, and Kobe - place the sports administrative department within the board of education, while the remaining 17 place the department under the purview of the governor. On the other hand, according to the "All Municipalities Survey on Sports Promotion" (2016) conducted by the SSF, when excluding ordinance-designated cities, over 85% of the 1,168 municipalities place the sports administration department within the board of education. As for the municipalities with smaller populations, the sports administrative departments continue to be included within the board of education, even after the revision of the Local Educational Administration Act.

By transferring authority of the sports administrative department from the board of education to the governor's office, prefectures and municipalities are attempting to not only increase the efficiency of sports-related business, but also to improve coordination with other administrative areas such as culture, tourism, social welfare, and community development. To promote sports administration within the government in a unified and comprehensive manner, in October 2015 the government established the "Japan Sports Agency" as an external bureau to MEXT to serve as the central authority for all relevant ministries and government offices. This may have an additional impact on the ways in which prefectures and municipalities handle sports administration.

Organized by the JSA, the Prefectural and Designated-City Sports Administrators Conference held in January 2016 made it clear that departments responsible for managing sports(excluding physical education at schools) within municipalities—whether or not situated in boards of education or governors' offices—should utilize new methods such as formulating fundamental principles, and hold comprehensive training conferences to place their sports administration apparatuses squarely within the basic policy framework established by their governors; thus, enhancing the diverse merits of sports as defined in the Basic Act on Sport within municipalities as well. It is essential that sports administration departments coordinate their efforts closely with other departments, such as those in charge of community development, park management, social welfare, and health promotion.

1 An ordinance-designated city is a Japanese city that has a population of greater than 500,000 and has been designated as such by an order of the Cabinet. As of September 2017, there are 20 ordinance-designated cities.

In addition, prefectures and municipalities are working to actively promote sports through large-scale international events such as the Rugby World Cup™ 2019 and the Tokyo 2020, as evidenced by the creation of a Rugby World Cup Section in Saitama Prefecture's Department of Public Services, an Olympic and Paralympic Division in Kanagawa Prefecture's Sports Bureau, and a Rugby World Cup 2019 Promotion Office in the General Planning Department of Kamaishi City, Iwate Prefecture.

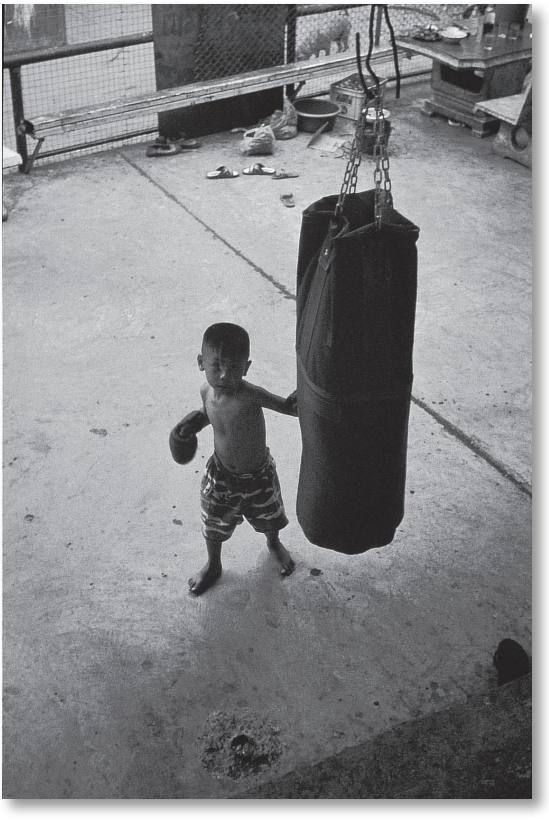
Local Quasi-Government Corporations and Public Foundations Related to Sports Promotion

In many prefectures and ordinance-designated cities, quasi-government corporations and public interest corporations have been established, playing a part in the promotion of sports and complementing the work of local government related to sports. These extra-government organizations usually receive financial assistance from the relevant local government at the time of their establishment. However, how such organizations are funded and the amount or ratio of government contribution varies depending on the organization. The establishment, operation, budgetary and human resources, as well as financial audits and the like, are prescribed by the "Local Autonomy Act."

When the Local Autonomy Act was partially revised in September 2003, the management of public facilities (sports facilities, city parks, cultural centers, social welfare facilities, etc.) switched from the "Operation Consignment System" to the "Designated Administration System", which was further enacted in September 2006. Under the former "Operation Consignment System", the management of public facilities was under the direct control of the local government, or was consigned only to those public foundations and corporations that were funded by the local government. However, with the revised system, such work may now be conducted either by the local government or by a designated administrator who has been selected through public advertisement. Applicants may include private businesses such as stock companies, public interest corporations, NPOs and voluntary basis organizations.

Due to this revision, many quasi-government corporations or public foundations that had been in operation primarily for the management and operation of public sports facilities have been forced to review their business activities and organization structures. The number of prefectures containing quasi-government corporations or public foundations has been steadily decreasing: from 25 prefectures in 2000 to 23 prefectures in 2005, and then to 18 prefectures in 2010 and 15 prefectures in 2016.

As of August 2016, eight of the 20 ordinance-designated cities have quasi-governmental corporations or public foundations. As with similar entities at the prefectural level, these organizations have played a certain role in the regional promotion of sports, although in some cases they have merged with sports associations (Yokohama) or other quasi-governmental corporations (Sapporo).



III. Measures of the Japan Sports Agency

1. JSA Measures and the Sport Basic Plan

JSA measures are based on the Sport Basic Plan, which was established in March 2012 by Article 9 of the Basic Act on Sport. This plan indicates the fundamental course of action for sports policies over a ten-year period, starting from 2012, and contains a set of measures outlining the systematic and comprehensive efforts for the first five years.

The Sport Basic Plan listed seven themes for the five-year period from 2012–2016, striving to actively promote sport and make Japan a Sport Nation. (a) Increasing sport opportunities for children; (b) Promotion of sport activities in line with the life stage; (c) Improvement of community sport environments where residents can actively participate; (d) Training human resources and developing the sport environments in order to enhance international competitiveness; (e) Promotion of international exchanges and contributions through bids for and hosting of international competitions such as the Olympic and Paralympic Games; (f) Improvement of the transparency and fairness/equity in the sport world; and (g) Creation of a virtuous cycle in the sport world. Within these seven broad themes, the plan had 19 narrower policies (e.g. promoting plans that improve children's physical fitness starting from early childhood,) which contain a total of 165 specific measures to be implemented.

In March 2017, the JSA had revised the Sport Basic Plan. The plan for the second five-year period beginning in April 2017 consist of four core policy goals: (a) expanding the number of people who do, watch, and support sports as well as improving facilities and personnel training to make that a reality; (b) using sports to create a vigorous society whose people are connected by powerful bonds; (c) developing a strong and sustainable environment and training system that will improve international competitiveness; and (d) raising the value of sports by promoting clean and fair sporting events. These four themes are similarly subdivided into 19 narrower policies which contain 139 specific measures to be implemented.

Sport and Regional Revitalization

In addressing the overconcentration of people in Tokyo, the revitalization of regional communities and balanced development across the country has consistently been an important policy issue since the end of the Second World War. In other words, it is a problem for which no fundamental solution has been found, even as the issues faced by society and the economy have evolved over the decades. A report released after the

reshuffling of the Second Abe Cabinet in September 2014 caused quite a stir when it indicated that around half of Japan's municipalities could cease to exist if the country's current trend of shrinking population continued. This prompted the administration to formulate a comprehensive "community development" strategy based on the future population estimate for each region, and to enact policies under which the national government would provide financial assistance for promoting specific measures within that strategy.

Creating jobs is an essential part of regional revitalization policy, and there is increasing hope in sports-related employment and industries as a way of revitalizing communities. Discussions regarding income through sports took place at the Future Sports Development Conference. The government's growth strategy itself indicates a goal of increasing the GDSP (see page 71) from JPY5 trillion to JPY15 trillion.

Promotion of Host Towns for Tokyo 2020

The Cabinet Secretariat's Headquarters for the Promotion of the Tokyo Olympic and Paralympic Games is working not only on the preparation and support of the event itself, but also on ensuring that the effects of the Olympics will spread throughout Japan and leave a continuous legacy in each region. One of those initiatives is the promotion of host towns. Under this policy, the government registers municipalities that promote cultural and economic exchange with participant countries and regions in the Olympics, and the government will provide support in the form of funding, temporary personnel assignment, and information sharing. The goal of the policy is to achieve regional revitalization that will continue after the end of the Olympics by creating an inclusive society, improving education and culture, and promoting community sports, globalization, and tourism. As of December 2016, a total of 138 regions have been registered.

Another initiative is the "Pilot Project for Creating Opportunities through Culture". The Olympics are not merely a sporting event - it is also a cultural festival, which means that the host cities are obligated to implement cultural programs. The organizing committee and the Agency for Cultural Affairs are aiming for 200,000 cultural programs with a total of fifty-million participants nationwide by the time the Games begin in 2020. Although this project (32 programs as of December 2016) is subsidized by the government, the policy includes an application requirement that ensures programs are not simple one-off events but are instead designed to continue even after the Olympics, leaving a legacy for future generations.

In addition to these, there are also other initiatives which aim to utilize international mega-sporting events held in Japan in the revitalization of communities and are being unveiled by various municipalities, such as the National Governors' Association, the Mayoral Alliance for Regional Revitalization through the Tokyo 2020 Olympic and Paralympic Games, the Kyushu Regional Strategy Conference, and other entities.

2. Policies on Sports Tourism and Governmental Support

Since the year 2000, the tourism industry has been gaining attention as an avenue for revitalizing local economies and creating new jobs. To create appealing tourist attractions that are competitive on a global level, the Japan Tourism Agency has been promoting initiatives that focus on new, community-based tourism. Among these, one policy that the entire government is pushing relates to the promotion of sports tourism.

The current status of sports tourism as well as its future were discussed at the first Liaison Conference for the Promotion of Sports Tourism, which was held on May 18, 2010. Professional and competitive sports organizations, tourism associations, media, and local governments were invited to the conference, and in attendance were individuals representing the Ministry of Land, Infrastructure, Transport, and Tourism; the Japan Tourism Agency; the Ministry of Internal Affairs and Communications; the Ministry of Foreign Affairs; the Ministry of Education, Culture, Sports, Science, and Technology; and the Ministry of Economy, Trade, and Industry. These conference members were divided into four working teams, each of which tackled a different area: designing sports tours, improving ticketing, promoting globalization and international exchange, or increasing the appeal of facilities. The teams recognized the problems faced in their respective areas and developed solutions for dealing with them. Discussions within the teams and at the conference were integrated into the Basic Policy to Promote Sports Tourism formulated in 2011.

With the creation of this basic policy, the primary objective of the Liaison Conference had been accomplished, but more deliberation was needed regarding the precise form were organizations that promote sports tourism should take. That debate led to the concept of creating a central organization that will support the local promotion of sports tourism by coordinating those efforts, which prompted the government and the private sector to begin working together. This led to the establishment of the Japan Sport Tourism Alliance (JSTA), which registered as a general incorporated association in April 2012, and currently serves as a hub for the promotion of

sports tourism in Japan.

The enactment of the Basic Act on Sport in 2011 also increased opportunities for sports tourism. The act states that sports play a role in not only the traditional areas of education and health promotion, but also in the revival of regional communities and the revitalization of society and the economy. Furthermore, sports tourism is given attention to in government sports policies as well—initiatives aimed at creating opportunities for travelers to enjoy sports at their destinations, as well as the establishment of a coordinating organization that works to stimulate communities through sports tourism, are both referred to within the Sport Basic Plan (2012) measures for promoting sports activities that match people's life stages, coordinating community sports with businesses and universities, and bidding on and hosting international competitions such as the Olympic and Paralympic Games.

This demonstrates that, in addition to the tourism administration, the sports administration is also taking notice of sports tourism. Moreover, the fact that Japan was selected to host the Rugby World Cup 2019 and the 2020 Olympics has led to a rapid proliferation in the number of local governments hosting their own sports events or trying to entice visitors through sports lodging. Until now, the national government and local municipalities have kept their sports promotion and tourism promotion separate, but recently there is a movement in establishing offices that jointly administer these two as well as other related areas. Promoting sports tourism will require coordination and cooperation between not only sports organizations and sports facilities, but also a diverse group of interested parties, including travel agencies, lodging facilities, law enforcement, the media, and local sports volunteers.

Sports Commissions in Japan

A sports commission is an interface that connects competitive sports organizations and the rights-holders of sporting events with municipalities to maximize the various benefits that sporting events bring. These include both economic benefits—inducing consumption, spurring investment, etc.—and social benefits such as recognition for the host area, an improved sense of community, and the accumulation of knowledge and human resources related to event management. The point of creating a sports commission is to uncover the hidden potential of communities and to establish centralized control of resources and rights that had previously been maintained by separate entities. Consideration of management and marketing is indispensable for accomplishing this objective.

It is possible to, for example, hold events that utilize the existing resources of an area, such as trail runs that take advantage of natural terrain and triathlons that use oceans and lakes, but doing so requires a broad management strategy that spans a wide range of fields, including coordination between municipalities and athletic organizations, policing and traffic control, and environmental and safety measures. Marketing is also a critical part of realizing the economic and social benefits created by incorporating the relatively unknown community events and festivals of a community into sporting events, and getting people from outside the area to participate in and watch them.

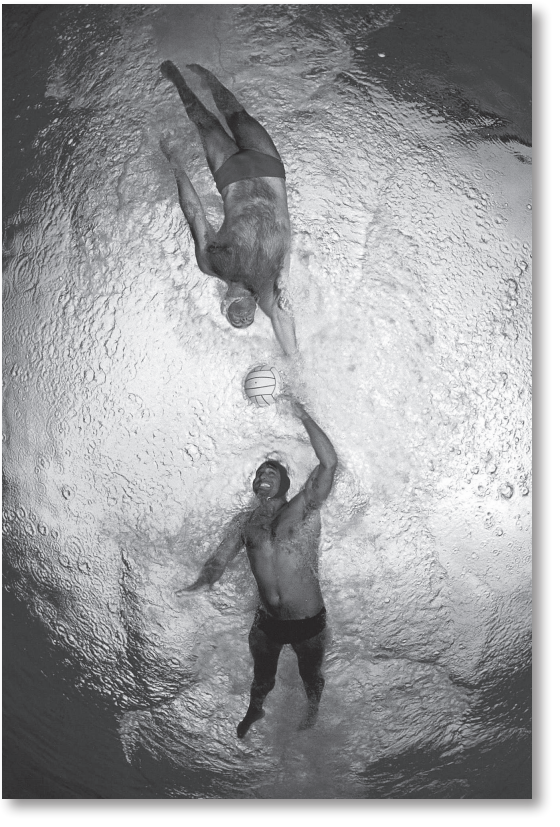
Another important role of the sports commission is to entice sporting events and training camps, and there are great hopes for hosting pre-games camps related to the Rugby World Cup 2019 and Tokyo 2020. In addition to create a sort of reputation as a mecca for that field, when trying to attract training camps it is essential to establish a centralized management system that aggregates data and includes a variety of athletic organizations—a "one-stop service," so to speak. A sustainable system are needed for bidding and hosting events to ensure that these are not merely one-off occasions. In brief, sports commissions should continually acquire knowledge about managing events in order to create and discover more business opportunities.

Regional Sports Commissions

As of September 2016, there were 23 organizations in Japan that correspond to regional sports commissions. Although their exact forms vary by municipality, its department is categorized into either an administrative department or non-administrative department. Administrative departments are organizations that are primarily established within the office of the head of government through methods such as combining the sports department and tourism department. Administrative departments are advantageous as they facilitate cooperation with other departments and related organizations in their municipal governments, make it easy to coordinate the usage of public sports facilities, including leveraging their position as official entities to build a network with neighboring municipalities.

Non-administrative departments are generally private organizations—those whose parent body is an sports association, tourism association, private corporation, or university, for example, or organizations with a legal status such as a general incorporated association or NPO. The circumstances of their creation differ by organization, but these organizations are often established at the direction of an administration then placed outside of it. Some advantages of non-administrative organizations are their ease in

coordinating with private companies and organizations as well as their quick decision-making, which make it easier for them to develop a variety of projects.



Chapter 2
Sports Participation

I. Participation in Sports and Physical Activities by Adult

1. Participation in Sports and Physical Activities

In order to understand the level of participation in sports and physical activities by adults, the Sasakawa Sports Foundation (SSF) has examined the statistical data gathered through the "SSF National Sports-Life Survey", which has been conducted by SSF every other year since 1992. The survey aims to understand the current situations of sports participation in terms of frequency, duration and intensity among Japanese adults, including those who participate in higher levels of sports and physical activities.

In this survey, the participation of adults in sports and physical activities were divided into the following levels; "Level 0" for those who did not participate in any sports or physical activities for the past year; "Level 1" for those who participated at least once during the year, but less than twice a week; "Level 2" for those who participated at least twice a week; "Level 3" for those who participated at least twice a week with a duration of "more than 30 minutes"; and "Level 4" for those who participated at least twice a week, duration of "more than 30 minutes", and with more than moderate intensity (Table 2-1).

The levels of participation in sports and physical activities by adults are shown in Figure 2-1. Level 4 is the participation level recommended by the American College of Sports Medicine (ACSM) and the Ministry

Table 2-1 Levels of Participation in Sports and Physical Activities

Level 0	Non-participation (0 time/year)
Level 1	At least once during the year, less than twice a week (1-103 times a year)
Level 2	At least twice a week (at least 104 times a year)
Level 3	At least twice a week, with a duration of more than 30 minutes
Level 4 (Active Sports Participant)	At least twice a week, with a duration of more than 30 minutes, and with more than moderate intensity

SSF National Sports-Life Survey (2016)

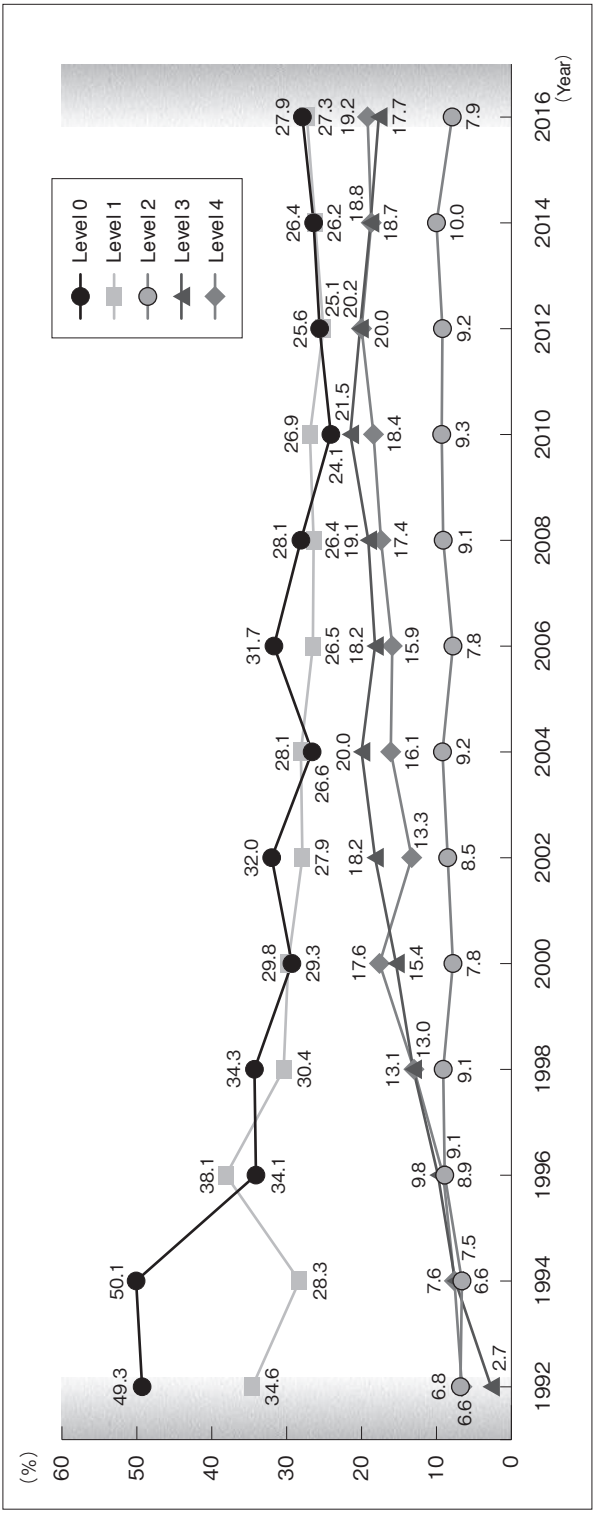


Figure 2-1 Rates of Participation in Sports and Physical Activities over the years

of Health, Labor and Welfare (MHLW) in Japan. SSF defines people who are at this level as "Active Sports Participants." Since 1992, the proportion of Active Sports Participants has been steadily increasing and in 2012 it reached 20% and the percentage is leveling off at the present. Level 3 has also shown a tendency to gradually increase at a similar rate to Level 4. When Level 3 and 4 are combined, it shows that over 35% of adults are achieving a better quality participation in sports and physical activities in terms of frequency and duration. One of the reasons behind this could be the increased awareness of prevention of lifestyle diseases, as well as more public interest in maintaining their body shape and improving health and physical strength.

In 1992 and 1994, adults rated at Level 0 accounted for about half of all adults in Japan. However, since that time this number has been decreasing. This downward trend has also been observed in Level 1, and both Levels 0 and 1 have followed a similar downward trend since 1996.

2. Participation in Sports and Physical Activities by Gender and by Age Group

The changes in the participation rate for sports and physical activities over the last ten years (2006 to 2016) were compared by gender and by age group. With regard to gender, a gradual increase was shown for the proportion of Active Sports Participants (Level 4), with a slightly higher level for men than for women (Table 2-2). Whilst men's proportion showed gradual increase, women began to decline since 2012. Conversely, the proportion of both men and women showed a slight decrease at Level 1, with the number of men remaining 10 percentage points higher than that number of women. At Level 0, the proportion of women was higher than that of men. However, in 2006, a 8.2 percentage point gap was found between women (35.6%) and men (27.4%), but in 2012 there was only a 5.5 percentage point gap found between women (28.3%) and men (22.8%), then in 2016 there was a 6.8 percentage point gap as women (31.2%) and men (24.4%), indicating that the gender difference was slightly widening again.

In terms of age groups, the proportion of the population reaching Level 4 was higher in 2016 for all age groups except the 30s age group, when compared to 2006 (Table 2-3). This was especially noticeable in the over 70s age group, where the proportion increased over a 10 percentage point (from 11.3% in 2006 to 21.9% in 2016). Similarly, the trend for a growing level of active participation in sports and physical activities for older adults was also seen in the numbers at Level 0, where there was a 15 percentage point decrease (from 51.1% to 35.8%) for the over 70 age group.

Table 2-2 Rates of Participation in Sports and Physical Activities over the years (By Gender)

(%)

Level	2006	2008	2010	2012	2014	2016
Men Level 0	27.4	24.4	21.0	22.8	23.2	24.4
Women Level 0	35.6	31.7	27.0	28.3	29.5	31.2
Men Level 1	31.0	31.5	32.7	30.0	30.6	31.7
Women Level 1	22.3	21.4	21.3	20.3	21.9	23.1
Men Level 4	17.2	18.5	20.4	20.4	20.9	21.3
Women Level 4	14.7	16.3	16.3	19.5	16.5	17.1

SSF National Sports-Life Survey (2006-2016)

Table 2-3 Rates of Participation in Sports and Physical Activities over the years (By Age)

(%)

Year	Level	In the 20s	In the 30s	In the 40s	In the 50s	In the 60s	70 and over	Total
2006	Level 0	21.8	24.8	26.6	32.3	32.2	49.7	31.7
	Level 1	40.1	39.9	37.8	21.0	15.3	9.4	26.5
	Level 2	7.5	7.1	6.6	10.8	6.1	8.2	7.8
	Level 3	11.5	12.7	13.6	20.2	27.3	21.4	18.2
	Level 4	19.0	15.5	15.4	15.7	19.0	11.3	15.9
2016	Level 0	24.4	23.8	25.1	33.8	28.5	31.9	27.9
	Level 1	38.7	38.3	37.4	25.1	13.1	12.0	27.3
	Level 2	5.6	10.8	9.3	7.2	7.5	5.8	7.9
	Level 3	12.0	13.6	10.2	14.8	27.5	28.4	17.7
	Level 4	19.3	13.4	18.1	19.2	23.3	21.9	19.2

SSF National Sports-Life Survey (2006, 2016)

Based on these results, it can be concluded that: (a) the proportion of people who regularly participate in sports and physical activities has exhibited an overall upward or levelled off trend; (b) the gender difference in such participation has not been narrowed; and in particular, (c) the proportion of the over 70s age group who participates in sports and physical activities has increased significantly.

3. Participation in Sports and Physical Actvities by Types of Sports

Table 2-4 shows the trends in the participation rate for various types of sports (performed at least once in the previous year). Until 2012, "Strolling", "walking", "calisthenics and light exercises" and "bowling" have ranked in the top four in the surveys conducted since 2006. "Weight training" became the fourth since 2014, continuing to increase steadily. Participation rate for "Bowling" has been decreasing for the last two surveys since 2014, but remains at the fifth. In 2010, "Jogging/Running" ranked the seventh and stays at the same rank until the latest survey, reflecting the impact of running boom in recent years.

4. Participation in Sports and Physical Activities by People with Disabilities

Figure 2-2 displays the number of days people participated in sports or recreation in the past year, with the results for people with disabilities on top and those for people without disabilities on the bottom. Data for the upper portion is obtained from the report titled "Project for promotion of disability sports in the communities (Research on promoting sports participation for people with disabilities)" by the Japan Sports Agency while the bottom portion is based on a 2015 survey conducted by the Cabinet Office.

The data indicates that 9.3% of disabled adults participated three or more days per week compared to 19.6% of nondisabled adults, while 9.9% of disabled adults participated one to two days per week compared to 20.8% of nondisabled adults. Using these two levels of participation as a standard for representing individuals who engaged regularly in sports or recreation reveals that the level of participation for disabled adults (19.2%) was limited to half that reported for nondisabled adults (40.4%). Even more striking is the fact that the percentage of individuals who did not participate was nearly three times higher for disabled adults (60.2%) than nondisabled adults (22.3%).

For almost all disability types (limb impairment [not requiring wheelchair], visual impairment, hearing impairment, intellectual disability,

Table 2-4 Rates of Participation in Sports and Physical Activities over the years (By Types pf Sports)

(%)

Rank	2006		2008		2010		2012		2014		2016	
1	Strolling	29.2	Strolling	30.8	Strolling	34.8	Strolling	34.9	Strolling	33.0	Strolling	32.0
2	Walking	19.7	Walking	22.4	Walking	24.5	Walking	25.0	Walking	25.7	Walking	23.7
3	Calisthenics and light exercises	16.1	Calisthenics and light exercises	17.5	Calisthenics and light exercises	18.5	Calisthenics and light exercises	20.5	Calisthenics and light exercises	18.5	Calisthenics and light exercises	17.3
4	Bowling	14.8	Bowling	15.1	Bowling	13.3	Bowling	13.0	Weight training	13.0	Weight training	13.5
5	Weight training	8.4	Weight training	11.1	Weight training	11.5	Weight training	12.2	Bowling	10.0	Bowling	9.5
6	Golf on a course	8.1	Swimming	9.0	Golf on a course	9.0	Jogging/Running	9.7	Jogging/Running	9.5	Jogging/Running	8.6
7	Swimming	7.5	Sea bathing	8.9	Fishing Jogging/Running	8.5	Golf on a course	8.3	Golf on a course	7.5	Fishing	7.5
8	Golf on a driving range	7.2	Golf on a course	8.7			Golf on a driving range	8.0	Golf on a driving range Cycling Swimming	7.2	Swimming	7.3
9	Sea bathing	6.9	Playing catch	8.0	Golf on a driving range	8.2	Playing catch Fishing	7.5			Golf on a course	7.2
10	Fishing Playing catch	6.8	Cycling	7.9	Playing catch	8.1					Cycling	6.7

Performed at least once in the previous year.

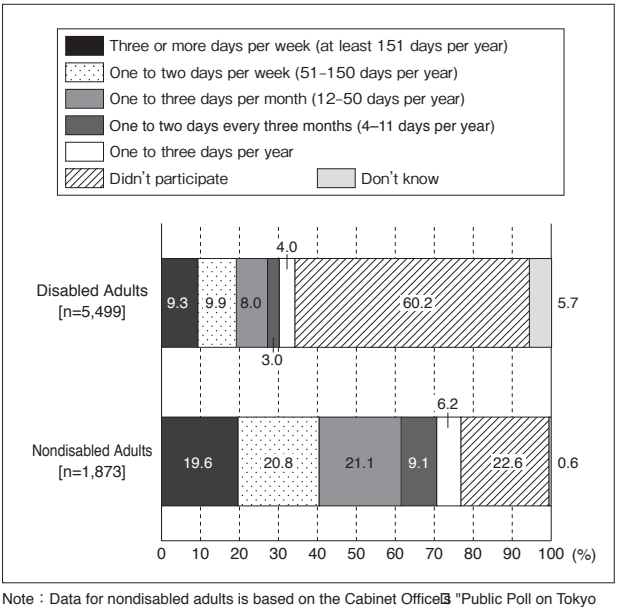
SSF National Sports-Life Survey (2006-2016)

developmental disability, mental disorder, and others [including speech, language, and chewing disorders as well as internal disorders]), around 20% of adults participated in sports or recreation at least one day per week, although this number was about 10% for individuals with limb impairment [requiring wheelchair].

Inferring these disparities from a perspective of sports experiences, then the data suggests that there are serious deficiencies in either the social environment during the growing period, or the current sports environment found in compulsory education such as physical education and sports clubs at schools, or perhaps both.

Types of Sports played by People with Disability

Table 2-5 displays the sports and recreational activity participation for disabled adults in the past year, sorted by eight types of disabilities. "Strolling" had the highest participation for all disability types, followed by "Walking" and "Calisthenics and light exercise". Also making it on the list is participation in aquatic exercises, such as "Swimming" and "Water walking", which have long been used for rehabilitation. Participation was



Note：Data for nondisabled adults is based on the Cabinet Office's "Public Poll on Tokyo Olympic and Paralympic Games (2015).
Project for promotion of disability sports in the communities (Research on promoting sports participation for people with disabilities) (JSA, 2016)

Figure 2-2 Number of Days Adults Participated in Sports or Recreation in the past year

Table 2-5 Participation in Sports and Recreation for the past year by Disability Type (n = 2,191 adults; multiple answers)

Limb Impairment [Requiring Wheelchair]			Limb Impairment [Not Requiring Wheelchair]			Visual Impairment			Hearing Impairment		
Rank	N=141	%	Rank	N=520	%	Rank	N=219	%	Rank	N=253	%
1	Strolling	22.0	1	Strolling	41.0	1	Strolling	37.9	1	Strolling	36.4
2	Playing catch	14.9	2	Walking	26.5	2	Walking	33.8	2	Walking	31.2
	Walking		3	Swimming	13.3	3	Swimming	12.8	3	Calisthenics and light exercise	10.7
4	Water Walking	8.5	4	Water Walking	12.3	4	Calisthenics and light exercise	10.5	4	Jogging/Runnig	9.9
5	Balloon Volleyball	7.8	5	Calisthenics and light exercise	10.6	5	Jogging/Runnig	10.0		Swimming	

Intellectual Disability			Developmental Disability			Mental Disorder			Other (Including Speech and Internal Disabilities)		
Rank	N=190	%	Rank	N=161	%	Rank	N=616	%	Rank	N=427	%
1	Strolling	45.8	1	Strolling	39.8	1	Strolling	45.0	1	Strolling	46.8
2	Walking	24.7	2	Walking	28.6	2	Walking	36.0	2	Walking	35.4
3	Swimming	24.2	3	Swimming	18.0	3	Swimming	14.4	3	Calisthenics and light exercise	11.9
4	Calisthenics and light exercise	11.6	4	Calisthenics and light exercise	14.9	4	Calisthenics and light exercise	14.0	4	Swimming	10.1
5	Bowling	10.0	5	Jogging/Runnig	11.2	5	Jogging/Runnig	12.8	5	Hiking	7.3

Reference: SSF National Sports-Life Survey 2016			Reference:Public Poll on Sports Participation 2016		
Rank	N=3,000	%	Rank	N=20,000	%
1	Strolling	33.0	1	Walking	50.8
2	Walking	25.7	2	Exercise	28.9
3	Calisthenics and light exercise	18.5	3	Training	17.0
4	Weight training	13.0	4	Running/Marathon/Long-Distance Relay	16.9
5	Bowling	10.0	5	Cycling	12.0

Note 1：Use of a wheelchair is determined by whether one is required for daily life.
Note 2：SSF National Sports-Life Survey is a national survey of individuals over the age of 18.
Note 3：Public Poll on Sports Participation 2016 conducted by Japan Sports Agency is a national survey of individuals between the ages of 18 and 79.

Project for promotion of disability sports in the communities (Research on promoting sports participation for people with disabilities) (JSA, 2016)
SSF National Sports-Life Survey (2016)
Public Poll on Sports Participation (JSA, 2016)

also high for "Jogging/Running", which further emphasizes the importance of guide runners for people with visual impairment.

5. Number of Registered Players by Types of Sports

In order to participate in competitions hosted by National Governing Bodies (NGB) of sports or their affiliated organizations, participants are required to pay an annual registration fee. These participants are acknowledged as registered players.

The number of registered players and teams for sports which had the highest number of participants (performed by the participants at least once a year) according to the results obtained from "The 2016 SSF National Sports-Life Survey" and "The 2015 SSF National Sports-Life Survey of Young People", were described based on the data released by NGBs (Table 2-6).

Table 2-6 The Number of Registered Players and Estimated Participants

Sports	Number of registered players [teams]			Participation rate(%)		Estimated number of participants (in 10,000s)	Ratio of registered players in the population
	Total	Men	Women	Teenager	Adult		
Bowling	10,486	7,667	2,819	15.3	9.5	1,168	0.09
Swimming	130,571	-	-	23.1	7.3	1,031	1.27
Badminton	275,250	-	-	24.6	5.3	842	3.27
Golf	551,218	498,086	53,132	2.2	7.2	774	7.12
Football	995,670	941,553	54,117	29.4	3.4	701	14.20
Table tennis	327,132	-	-	19.6	4.3	679	4.82
Mountaineering	8,984	-	-	6.1	4.7	560	0.16
Basketball	636,987	366,958	270,029	28.1	2.1	551	11.56
Volleyball	416,273	146,131	270,142	18.8	2.8	514	8.10
Baseball	[59,083]	-	-	16.4	2.9	495	-
Tennis	11,877	7,500	4,377	8.2	3.3	440	0.27
Softball	126,941	85,286	41,655	7.5	2.4	338	3.76
Ground golf	179,317	-	-	0.1	2.5	261	6.87
Soft tennis	458,275	-	-	10.3	1.1	236	19.42
Ice skating	7,503	-	-	5.5	1.5	221	0.34
Aerobics	1,388	-	-	0.6	1.6	173	0.08
Track and field	417,435	270,000	147,435	10.0	0.5	170	24.56
Flying disc	4,630	3,154	1,476	4.9	0.5	110	0.42
Karate	83,785	-	-	3.2	0.4	80	10.47
Surfing	10,152	8,784	1,368	0.4	0.6	67	1.52
Canoe	3,880	2,805	1,075	1.8	0.4	63	0.62
Judo	161,211	132,727	28,484	2.2	0.3	57	28.28
Rowing	9,157	6,356	2,801	1.1	0.3	44	2.08
Rugby	92,643	89,071	3,572	1.5	0.2	39	23.75

Note1：The estimated number of participants is displayed in a descending order (participants are aged 10 or over, and participate in the sports at least once a year).
Note2：The estimated population of participants is the total number of 1 and 2 below.
1 The number of participants is calculated by multiplying the participation rate suggested in the 2016 survey by the adult population (of 103,888,078 people based on the Basic Resident Register on January 1, 2015).
2 The number of participants is calculated by multiplying the participation rate suggested in the 2015 survey by the teenage population (of 11,836,576 people based on the Basic Resident Register on January 1, 2014).
Note3：Soft volleyball is not included in the volleyball.
Note4：Futsal/5 a aside football is not included in the football.

SSF Census of the National Governing Bodies of Sports (2017)
SSF National Sports-Life Survey of Young People (2015)
SSF National Sports-Life Survey (2016)

When the number of individual players was examined, the sports that had the largest number of registered players was "Football" with 995,670 people, followed by "Basketball" (636,987 people), "Golf" (551,218", "Soft tennis" (458,275 people), "Track and field" (417,435 people) and "Volleyball" (416,273 people). By gender, the number of men registered was higher than that of women in many sports, with the exception of "volleyball" that had a higher number of women.

Population of Registered Players and Actual Sports Participants

Dividing the population of registered players by the estimated population of participants allows the population ratio of the registered players to be obtained. The sports that had the highest ratio of the registered players were "Judo" at 28.28%, followed by "Track and field" (24.56%) "Rugby" (23.75%), "Soft tennis" (19.42%), "Football" (14.20%), "Basketball" (11.56%) and "Karate" (10.47%). The sports that had a high ratio of registered players tended to have a relatively high participation rate in young people, aged 10-19 years. On the contrary, the ratio of registered players tended to be low in individual-oriented leisure sports such as "Aerobics" (0.08%), "Bowling" (0.09%), and "Mountaineering" (0.16%).

II. Participation in Sports and Physical Activities by Children and Young People

1. Participation in Sports and Physical Activities by Children Aged 4-9 Years

The levels of frequency of children's participation in sports and physical activities were divided into 4 groups (Table 2-7). Those who had not participated in any sports or physical activities within the previous year were categorized into the "non-participation group"; those who participated at least once a year but less than three times a week (between 1-155 times per year) were categorized into the "low frequency group"; those who participated at least three times a week but less than seven times a week (between 156-363 times per year) were categorized into the "moderate frequency group"; and those who participated at least seven times a week (364 or more times per year) were categorized into the "high frequency group". Participation in sports activities during classes or events at school, kindergarten, or nursery school were excluded from this survey.

Concerning the frequency of participation in sports and physical activities, children who never participated in any sports or physical activities (non-participation group) was 3.7%; those who participated at least three times a week (moderate and high frequency groups) was almost 80%, and those who participated in sports and physical activities at least seven times a week (high frequency group) was about 50% (Figure 2-3).

In Figure 2-4, the frequency levels of children's participation in sports are displayed by gender and by school year. With regard to gender, the proportion of boys and girls in the high and moderate frequency group, the total percentage was 82.2% for boys and 78.3% for girls.

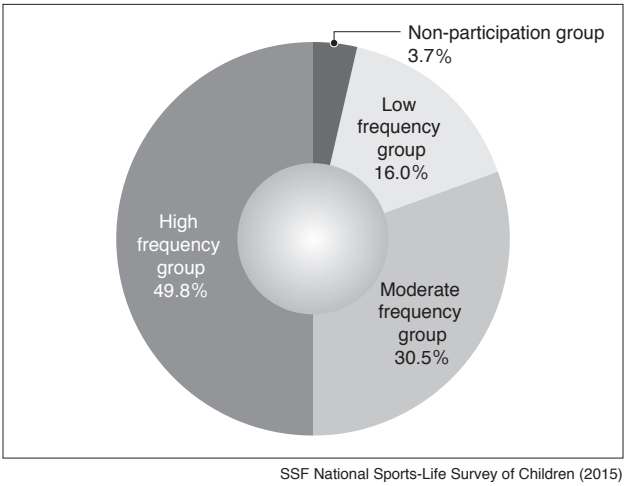
In terms of the frequency levels of children's participation in sports by school year, the number of children in the low frequency group decreased

Table 2-7 Categories of Participation in Sports and Physical Activities for Children Aged 4-9 years

Participation Group	Criteria
Non-participation group	Non-participation (0 time/year)
Low frequency group	At least once a year but less than 3 times a week (between 1-155 times/year)
Moderate frequency group	At least 3 times a week but less than 7 times a week (between 156-363 times/year)
High frequency group	At least 7 times a week (364 or more times/year)

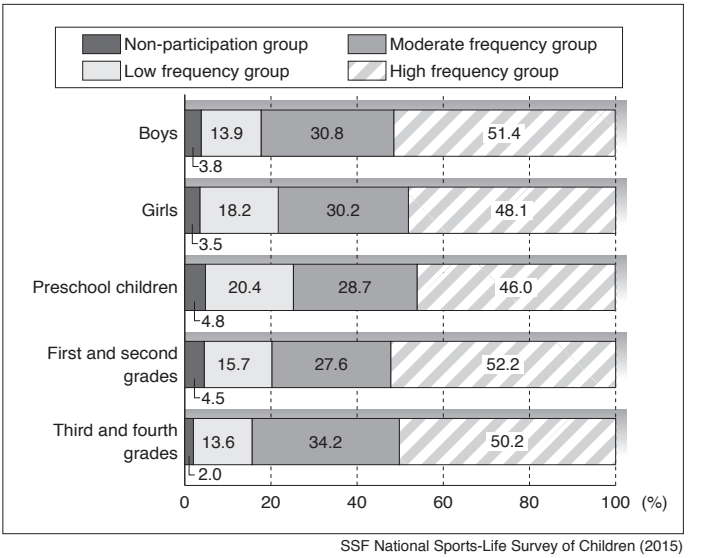
SSF National Sports-Life Survey of Children (2015)

as the school years advanced, with 20.4% for preschool children, 15.7% for first and second grades, and 13.6% for third and fourth grades. An increasing pattern was found for children who participated in sports and physical activities at least three times a week (moderate and high frequency groups) as their school years advanced, with 74.7% for preschool children, 79.8% for first and second grades, and 84.4% for third and fourth grades.



SSF National Sports-Life Survey of Children (2015)

Figure 2-3 Rate of Sports Participation for Children Aged 4-9 years



SSF National Sports-Life Survey of Children (2015)

Figure 2-4 Frequency Levels of Participation for Children Aged 4-9 years (By Gender and By School Year)

2. Participation in Sports and Physical Activities by Children Aged 4-9 Years by Types of Sports

Table 2-8 shows the ranking of participation in sports and physical activities by children aged 4-9 years (top ten sports and physical activities participated at least once in the previous year). The sports that had the highest participation rate in 2015 was "Playing tag", followed by "Riding bicycle", "Swinging", "Hide-and-seek" and "Skipping rope (including long rope)".

Table 2-9 shows the raking of participation in sports and physical activities that were "often participated in" by children aged 4-9 years. This excludes sports and physical activities that were performed irregularly, allowing for a more accurate and clear understanding of the types of sports and physical activities that are participated on a daily basis. Overall, "Playing tag" had the highest participation rate, followed by "Riding bicycle", "Swimming", "Swinging" and "Dodgeball".

By gender, the most popular sports for boys were "Playing tag", following by "Football", "Swimming", "Riding bicycle" and "Dodgeball", and those for girls were also "Playing tag", "swinging", "Riding bicycle", "Skipping rope (including long rope)" and "Swimming." This suggests that boys at the ages of around 4-9 years are already participating in sports that continue to be popular in junior high and high school years, while girls were mainly participating in play based activities."

Table 2-8 Ranking of Participation in Sports and Physical Activities by Children Aged 4-9 years (At least once a year)

Rank	Sports	%
1	Playing tag	65.7
2	Riding bicycle	53.2
3	Swinging	52.1
4	Hide-and-seek	48.0
5	Skipping rope (including long rope)	47.2
6	Swimming	46.3
7	Horizontal Bar	44.8
8	Running	39.7
9	Dodgeball	39.6
10	Football	35.1

SSF National Sports-Life Survey of Children (2015)

Table 2-9 Ranking of Participation in Sports and Physical Activities by Children Aged 4-9 years (Those Who "Often Participated in" By Gender)

Overall			Boys			Girls		
Rank	Sports	%	Rank	Sports	%	Rank	Sports	%
1	Playing tag	50.5	1	Playing tag	50.9	1	Playing tag	50.0
2	Riding bicycle	36.7	2	Football	45.5	2	Swinging	39.4
3	Swimming	34.0	3	Swimming	37.3	3	Riding bicycle	37.5
4	Swinging	29.3	4	Riding bicycle	35.9	4	Skipping rope (including long rope)	33.4
5	Dodgeball	28.7	5	Dodgeball	32.4	5	Swimming	30.6
6	Football	26.2	6	Swinging	19.6	6	Horizontal bar	27.7
7	Skipping rope (including long rope)	25.1	7	Runnnig	19.2	7	Dodgeball	24.9
8	Horizontal bar	20.4	8	Hide-and-seek	18.5	8	Runnnig	19.8
9	Runnnig	19.5	9	Skipping rope (including long rope)	17.2	9	Hide-and-seek	19.2
10	Hide-and-seek	18.9	10	Horizontal bar Playing catch	13.4	10	Riding unicycle	11.3

Note：The "often participated in" indicates sports and physical activities that were participated in more frequently than the "at least once a year".

SSF National Sports-Life Survey of Children (2015)

3. Participation in Sports and Physical Activities by Young People Aged 10-19 Years

The participation rates of young people aged 10 to 19 years in sports and physical activities are analyzed in terms of frequency, duration and intensity (Table 2-10).

Those youths who did not participate in any sports or physical activities at all in the previous year were categorized as "Level 0"; those who participated sports and physical activities at least once a year but less than once a week (1 to 51 times/year) as "Level 1"; those who participated at least once a week but less than five times a week (52 to 259 times/year) as "Level 2"; those who participated at least five times a week (260 or more times/year) as "Level 3"; and those who participated at least five times a week, with a duration of 120 minutes, and with more than moderate intensity as "Level 4." Participation in sports activities during classes or events at schools were excluded from this survey.

From the survey conducted in 2015, the percentage of young people who did not participate in any sports or physical activities in the previous year (Level 0) was 13.2%, representing one in every eight young people (Figure 2-5). Those who participated at least five times a week, with a duration of 120 minutes, and with more than moderate intensity (Level 4) constituted 27.1% of the young people.

By gender, it was found that the proportion of boys at Level 1 was 9.8% while that of girls was 16.6%. Meanwhile, the proportion of boys at Level 4 was 33.9%, and that of girls was 20.2%. Both of these results show that the frequency of participation in sports and physical activities is higher for boys than girls (Figure 2-6). It was also found that one in every six girls did not participate in any sports or physical activities at all during the previous year.

Table 2-10 Levels of Participation in Sports and Physical Activities by Young People Aged 10-19 years

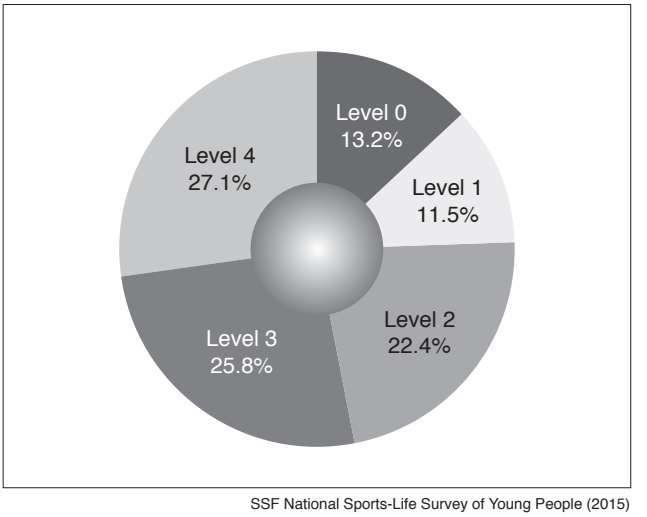
Level	Criteria
Level 0	Non-participation (0 time/year)
Level 1	At least once during the year but less than once a week (1-51 times/year)
Level 2	At least once a week but less than 5 times a week (52-259 times/year)
Level 3	At least 5 times a week (260 times or more/year)
Level 4	At least 5 times a week (260 times or more/year) with a duration of 120 minutes, and with more than moderate intensity

SSF National Sports-Life Survey of Young People (2015)

By school year, the proportion of young people at Level 0 was 1.9% in elementary school years, 6.4% in junior high school years, 16.7% in high school years and 20.7% in college years, indicating a general tendency to increase as school years advanced. Moreover, the proportion of youths at Level 4 was high both in junior high and high school years (at 42.5% and 36.2%, respectively), which may have been due to school sports clubs that provide opportunities for students to participate in physical activities. Among young workers (aged 15-19 years), the proportion of individuals at Level 0 was extremely high at 38.9%, and those at Level 4 were only 3.3%. Those who participated in physical activities once a week or less (e.g. Level 1 or below) accounted for 64.5% of young workers. Such a low participation rate compared to other youths is an issue that needs to be addressed appropriately.

4. Ranking of Participation in Sports and Physical Activities by Young People Aged 10-19 by Types of Sports

Table 2-11 shows the ranking of participation in sports and physical activities by young people aged 10-19 years (top ten sports and physical activities participated at least once in the previous year). In 2015, "Football" had the highest participation rate, followed by "Playing tag", "Basketball", "Dodgeball", and "Jogging or running".



SSF National Sports-Life Survey of Young People (2015)

Figure 2-5 Rates of Sports Participation for Young People Aged 10-19 years

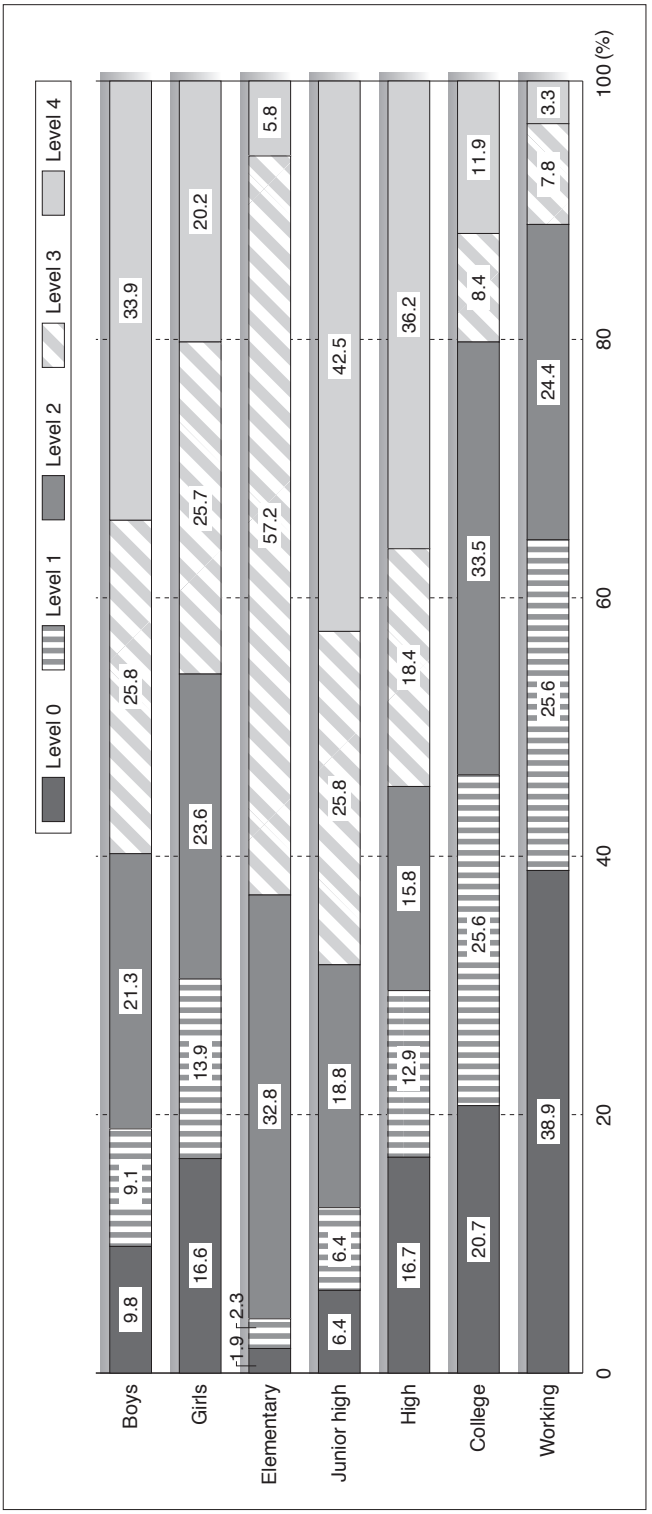


Figure 2-6 Rates of Sports Participation for Young People Aged 10-19 years (By Gender and By School Year)

Table 2-11 Ranking of Participation in Sports and Physical Activities by Young People Aged 10-19 years (At Least Once a Year)

2011			2013			2015		
Rank	Sports	%	Rank	Sports	%	Rank	Sports	%
1	Football	26.9	1	Football	31.1	1	Football	29.4
2	Basketball	23.8	2	Playing tag	30.0	2	Playing tag	28.7
3	Jogging/running	23.5	3	Jogging/running	26.4	3	Basketball	28.1
4	Playing tag	22.8	4	Basketball	25.9	4	Dodgeball	25.0
5	Swimming	22.7	5	Swimming	25.3	5	Jogging/running	24.9
6	Badminton	19.2	6	Dodgeball	24.0	6	Badminton	24.6
7	Skipping rope	19.1	7	Skipping rope	23.1	7	Swimming	23.1
8	Weight training	18.9	8	Badminton	22.3	8	Skipping rope	21.9
9	Dodgeball	18.8	9	Weight training	20.7	9	Weight training	20.1
10	Baseball	17.5	10	Swinging	20.2	10	Playing catch	20.0

SSF National Sports-Life Survey of Young People (2011, 2013, 2015)

Table 2-12 shows the ranking of participation in sports and physical activities that were "often participated in (high frequency level)" by young people aged 10-19 years. In 2015, "Football" had the highest participation rate, followed by "Basketball", "Playing tag", "Badminton" and "Jogging or running". For the level of "at least once a year", "Volleyball" and "Table tennis" ranked fairly low, 13th and 12th places, respectively. However, these sports ranked in the top ten of sports and physical activities that were "often participated in" by young people. Therefore, sports and physical activities that are "often participated in" by young people can serve as a benchmark to distinguish their regular or occasional sporting activities.

"Football" had high participation rates among boys, on the other hand "Badminton" and "Volleyball" had high particiapation rates for girls, and "Basketball" was participated by both boys and girls. This result suggests that the popular school sports clubs in junior high and high schools reflect the ranking of sports participated by young people.

5. Participation in Sports by Children and Young People with Disabilities

Figure 2-7 displays the number of days that disabled children and young people between the ages of 7 and 19 participated in sports and recreation. According to the "Project for promotion of disability sports in the communities (Research on promoting sports participation for people with disabilities)" by the Japan Sports Agency, 14.0% participated three or more days per week in the past year, while 17.5% participated one to two days per week. The percentage of disabled children in this age group that participated at least one day per week was therefore 31.5%, compared to 41.9% who responded that they didn't participate at all. As for disability type, about 40% of children with visual or hearing impairment participated in sports and recreation at least one day per week, compared to about 10% of children with limb impairment [requiring wheelchair].

Participation in Sports and Recreation by Disability Tape

Table 2-13 displays the top three sports and recreation activities that children and young people with disabilities participated in over the past year for each disability type. "Swimming", "Strolling", "Walking" and "Calisthenics and light exercise" had the highest participation rates. "Swimming" had the highest participation for almost all disability types due to its many different approaches and instructional methods, which strengthens its coaching and support systems and allows it to be actively implemented for school-age children.

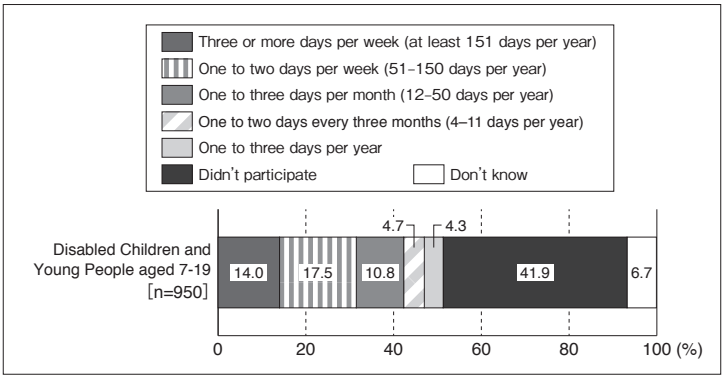
Table 2-12 Ranking of Participation in Sports and Physical Activities by Young People Aged 10-19 years (Often Participated in)

2011			2013			2015		
Rank	Sports	%	Rank	Sports	%	Rank	Sports	%
1	Football	23.7	1	Football	28.2	1	Football	25.6
2	Basketball	21.2	2	Basketball	21.5	2	Basketball	23.4
3	Jogging/running	17.0	3	Playing tag	21.3	3	Playing tag	19.7
4	Swimming	16.1	4	Jogging/running	19.3	4	Badminton	18.2
5	Baseball	15.3	5	Dodgeball	17.1	5	Jogging/running	17.6
6	Badminton	13.7		Swimming		6	Dodgeball	17.2
7	Weight training	13.4	7	Badminton	16.7	7	Swimming	14.5
8	Playing tag	13.2	8	Weight training	15.1		Volleyball	
9	Volleyball	11.2	9	Baseball	15.0	9	Weight training	14.1
10	Dodgeball	10.4	10	Volleyball	12.4	10	Table tennis	13.7

Note : The "often participated in" indicates sports and physical activities that were participated in the most over the past year.

SSF National Sports-Life Survey of Young People (2011, 2013, 2015)

Figure 2-7 Number of Days Disabled Children and Young People aged 7-19 Participated in Sports and Recreation in the past year



Project for promotion of disability sports in the communities
(Research on promoting sports participation for people with disabilities) (JSA, 2016)

Table 2-13 Sports and Recreation Participation for the past year by Disability Type (n = 552 disabled children and young people aged 7-19; multiple answers)

Limb Impairment [Requiring Wheelchair]			Limb Impairment [Not Requiring Wheelchair]			Visual Impairment			Hearing Impairment		
Rank	Sport	%	Rank	Sport	%	Rank	Sport	%	Rank	Sport	%
1	Strolling	28.6	1	Walking	25.7	1	Swimming	50.0	1	Swimming	30.0
	Water Walking			Swimming		2	Calisthenics and light exercise	40.0	2	Jogging/Runnig	22.5
3	Sea bathing	21.4	3	Strolling	22.9	3	Skipping rope	30.0	3	Playing catch	17.5
										Skipping rope	

Intellectual Disability			Developmental Disability			Mental Disorder			Other (Including Speech and Internal Disabilities)		
Rank	Sport	%	Rank	Sport	%	Rank	Sport	%	Rank	Sport	%
1	Swimming	42.4	1	Swimming	44.6	1	Swimming	28.6	1	Strolling	31.8
2	Strolling	37.0	2	Strolling	29.3	2	Strolling	20.0	2	Calisthenics and light exercise	27.3
3	Jogging/Runnig	21.7	3	Skipping rope	21.3	3	Playing catch	17.1	3	Swimming	20.5
							Baseball				
							Skipping rope				

Reference: SSF National Sports-Life Survey of Children 2015			Reference: SSF National Sports-Life Survey of Young People 2015		
Rank	Sport	%	Rank	Sport	%
1	Playing tag	41.1	1	Football	31.1
2	Swimming	34.5	2	Playing tag	30.0
3	Football	34.3	3	Jogging/Runnig	26.4

Note 1：Use of a wheelchair is determined by whether one is required for daily life.
Note 2：SSF National Sports-Life Survey of Children is a national survey of individuals between the age of 4 and 10.
Note 3：SSF National Sports-Life Survey of Young People is a national survey of individuals between the age of 10 and 19.

Project for promotion of disability sports in the communities
(Research on promoting sports participation for people with disabilities) (JSA, 2016)
SSF National Sports-Life Survey of Children (2015)
SSF National Sports-Life Survey of Young People (2015)

III. Sports Spectators

1. Sports Spectating at Live Sports Events

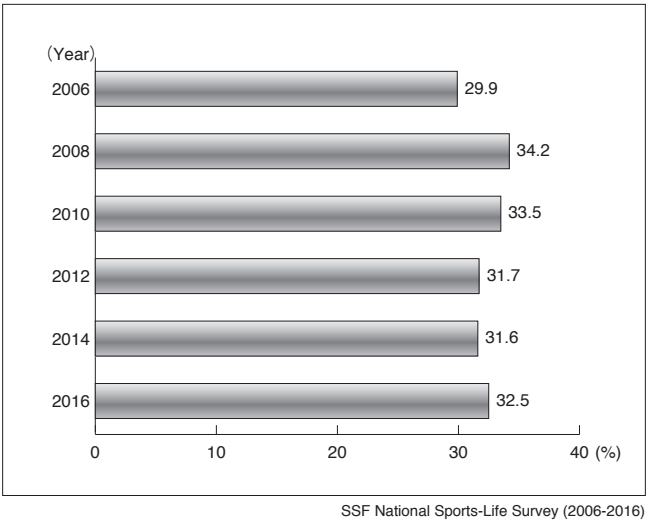
According to "The 2016 SSF National Sports-Life Survey", 32.5% of adults had attended a sporting event at gymnasiums/arenas or stadium as a spectator in the previous year (Figure 2-8). When compared with previous surveys, the rate of sports spectating has stayed within the range of at around 30 percent in the last 10 years.

By gender, the spectating rate for men (37.4%) was 9.8 percentage points higher than the rate for women (27.6%) (Figure 2-9). By age, the highest spectating rate was found in the 40s age group (38.6%), followed by the 20s and 30s age groups. Since the 2000 survey, the spectating rate has consistently been found to be the highest in the 40s age group.

When looking at the results by sports, "Professional baseball (NPB)" had the highest spectating rate at 15.5%, followed by "High-school baseball" and "J. League football (J1 and J2) - professional football league" at both 6.4%, and "marathon and Ekiden - marathon relays" at 4.0% (Table 2-14).

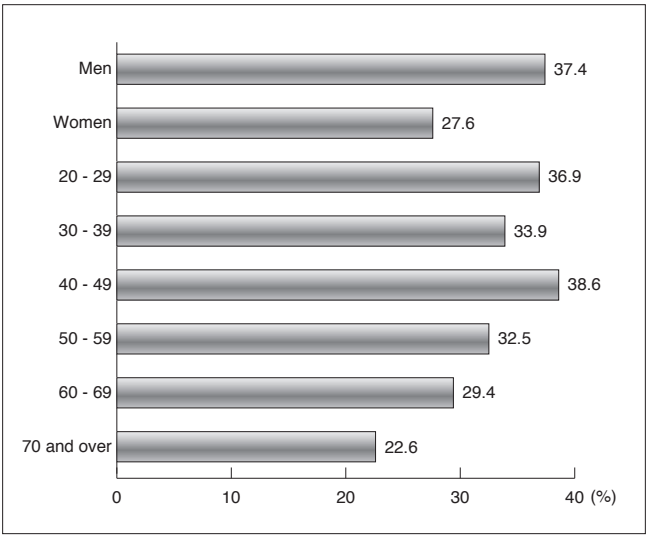
Spectator numbers for professional sports

Table 2-15 displays the yearly changes in the number of spectators attending the events of professional sports organizations affiliated with the Japan Professional Sports Association. Excluding government-controlled competitive sports, "Baseball" had the most spectators in 2015, with a total of 24,236,920. Next came "Football (J. League)" with 9,178,812 spectators.



SSF National Sports-Life Survey (2006-2016)

Figure 2-8 Rates of Adults Spectating Live Sports Events



SSF National Sports-Life Survey (2016)

Figure 2-9 Rate of Adults Attending Live Sports Events (By Gender and Age)

Table 2-14 Popular Spectator Sports (multiple answers)

2016			
Rank	Sports	Attendance rate(%)	Estimated spectators (in 10,000s)
1	Professional baseball (NPB)	15.5	1,610
2	High-school baseball J Leaguefootball (J1,J2,J3)	5.3	551
4	Marathon and Ekiden	4.0	416
5	Football (High school, University, JFL, etc.)	2.2	229
6	Amateur baseball (University, company teams, etc.)	1.5	156
7	Volleyball (High school, University, V League, etc.) Professional golf	1.4	145
9	Basketball (High school, University, NBL, WJBL, etc.) Rugby	1.3	135

SSF National Sports-Life Survey (2016)

In addition to baseball and football, "Women's golf tour", and "Sumo wrestling" had more spectators than they did in 2011.

Among government-controlled competitive sports in 2015, "Boat racing" had the most spectators (8,938,331), followed by "National horse racing (6,317,073)", "Keirin" (3,303,425), and motorcycling racing (1,657,126). National horse racing was the only sport which showed an increase in the number of spectators from 2011, in contrast to numbers for the other publicly-run competitive sports which were either holding steady or declining.

2. Sports Viewing on TV

In Table 2-16 and 2-17, the rates of sports viewing on TV, sports spectating, and sports participation in adults and young people are shown. The rate of viewing sports on TV among adults was estimated to be 88.2% (about 91.64 million people) and 85.1% among adolescents (about 10.07 million people). Regardless of gender and age, this rate was very high in both groups, but slightly higher among adults. In terms of other sports spectating and sports participation, both rates were higher among youths.

When looking at the types of sports viewing on TV by adults (Table 2-18), the most viewed sports were "Professional baseball (NPB)" at 54.2%, followed by "High school baseball", "Figure skating" "men's national football teams (including the Olympics)", and "Marathon and Ekiden". By gender, TV sports were viewed more by men than by women in most of the sports, except for "Figure skating" and "Women's national volleyball teams", which showed higher rates of viewing among women.

Among young people, "Professional baseball (NPB)" was also the most watched sports events at 48.4%, followed by "Men's national football teams (including the Olympics)", "Women's national football teams", "Figure skating" and "High school baseball" (Table 2-19). By gender, "Men's national football teams (including the Olympics)" topped the list for men, but many of the sports viewed by people differed by gender.

Table 2-15 Changes in Spectator Numbers for Professional Sports

(Number of People)

Sport	2011	2012	2013	2014	2015
Baseball	21,570,196	21,370,226	22,047,491	22,859,351	24,236,920
Football (J. League)	7,744,837	8,754,694	8,350,228	8,764,301	9,178,812
Men's Golf - JGTO	574,535	481,769	370,209	386,394	336,427
Men's Golf - PGA Senior	47,525	50,628	63,316	69,227	97,296
Women's Golf Tour	420,600	510,261	490,510	528,899	560,480
Sumo Wrestling	308,640	515,435	622,580	703,277	776,662
Boxing	329,161	293,000	—	—	—
Formula Racing	199,846	238,105	228,180	189,680	188,890
Bowling	100,000	100,000	—	—	—
Dance	65,000	65,000	—	—	—
Kickboxing	45,000	65,000	—	—	—
Boat Racing	13,032,611	11,160,395	9,992,747	9,319,130	8,938,331
Horse Racing	6,151,105	6,190,296	6,092,403	6,142,471	6,317,073
Keirin	4,898,502	4,686,951	4,232,840	3,636,080	3,303,425
Motorcycle Racing	1,737,560	1,702,878	1,757,268	1,684,330	1,657,126

Note 1：Annual spectator numbers for member organizations of the Japan Professional Sports Association (JPSA).
Note 2：Totals for 2011–2012 are based on the Professional Sports Almanac, while those for 2013 onward are based on information made public by various organizations.
Note 3：JGTO: Japan Golf Tour Organization, PGA: Professional Golfers' Association of Japan.
Note 4：A horizontal line (—) indicates that the number of spectators is unknown.

JPSA：Professional Sports Almanac (2012, 2013)
Documents published by JPSA member organizations (2016)

Table 2-16 Rate of Sports Viewing and Sports Participation in Adults (2016)

(%)

	Overall	Men	Women	In the 20s	In the 30s	In the 40s	In the 50s	In the 60s	70 and over
Rate of sports viewing on TV	88.2	90.0	86.4	81.2	82.4	88.8	92.6	92.3	90.5
Rate of sports spectating	32.5	37.4	27.6	36.9	33.9	38.6	32.5	29.4	22.6
Rate of sports participation	72.1	75.6	68.8	75.6	76.2	74.9	66.2	71.5	68.1

Note : The proportion of those who watched or participated in sports at least once a year

SSF National Sports-Life Survey (2016)

Table 2-17 Rate of Sports Viewing and Sports Participation in Young People Aged 10-19 (2015)

(%)

	Overall	Boys	Girls	Elementary	Junior high	High	College
Rate of sports viewing on TV	85.1	87.1	83.1	87.5	86.6	85.7	85.9
Rate of sports spectating	42.4	47.4	37.3	38.6	41.9	48.5	43.1
Rate of sports participation	86.8	90.2	83.4	98.1	93.6	83.3	79.3

Note : The proportion of those who watched or participated in sports at least once a year

SSF National Sports-Life Survey of Young People (2015)

Table 2-18 Popular Sports Viewing on TV for Adults (2016)

Overall			Men			Women		
Rank	Sports	%	Rank	Sports	%	Rank	Sports	%
1	Professional baseball (NPB)	54.2	1	Professional baseball (NPB)	65.3	1	Figure skating	59.2
2	High school baseball	48.6	2	High school baseball	53.8	2	Women's national volleyball team	47.3
3	Figure skating	46.6	3	Men's national football teams (including the Olympics)	51.5	3	Marathon and Ekiden	43.9
4	Men's national football teams (including the Olympics)	45.6	4	Sumo wrestling	43.9	4	High school baseball	43.5
5	Marathon and Ekiden	43.6	5	Marathon and Ekiden	43.4	5	Professional baseball (NPB)	43.2
6	Women's national volleyball team	43.1	6	Women's national volleyball team	38.8	6	Men's national football teams (including the Olympics)	39.8
7	Sumo wrestling	38.7	7	Professional tennis	37.7	7	Men's national Volleyball team	39.6
8	Professional tennis	36.9	8	Figure skating	33.8	8	Professional tennis	36.0
9	Men's national Volleyball team	35.5	9	Women's national football team	33.7	9	Sumo wrestling	33.6
10	Women's national football team	31.2	10	Professional golf	32.3	10	Women's national football team	28.7
	None watched on TV	11.8		None watched on TV	10.0		None watched on TV	13.6

SSF National Sports-Life Survey (2016)

Table 2-19 Popular Sports Viewing on TV for Young People Aged 10-19 years (2015)

Overall			Men			Women		
Rank	Sports	%	Rank	Sports	%	Rank	Sports	%
1	Professional baseball (NPB)	48.4	1	Men's national football teams (including the Olympics)	56.8	1	Figure skating	52.2
2	Men's national football teams (including the Olympics)	47.9	2	Professional baseball (NPB)	56.7	2	Women's national football teams	43.9
3	Women's national football teams	45.6	3	Women's national football teams	47.2	3	Professional baseball (NPB)	40.0
4	Figure skating	40.7	4	High school baseball	44.3	4	Men's national football teams (including the Olympics)	38.8
5	High school baseball	38.8	5	Professional tennis	37.1	5	High school baseball	33.2
6	Professional tennis	33.9	6	J League football (J1,J2,J3)	31.6	6	Professional tennis	30.6
7	Marathon and Ekiden	27.2	7	Figure skating	29.4	7	National volleyball teams	27.6
8	National volleyball teams	22.7	8	Marathon and Ekiden	26.8		Marathon and Ekiden	27.6
9	J League football (J1,J2,J3)	21.6	9	Professional football (Europe, South america, etc.)	25.4	9	J League football (J1,J2,J3)	11.5
10	Professional football (Europe, South america, etc.)	17.7	10	Major league baseball	21.2	10	Professional football (Europe, South america, etc.)	9.8
	None watched on TV	14.9		None watched on TV	12.9		None watched on TV	16.9

SSF National Sports-Life Survey of Young People (2015)

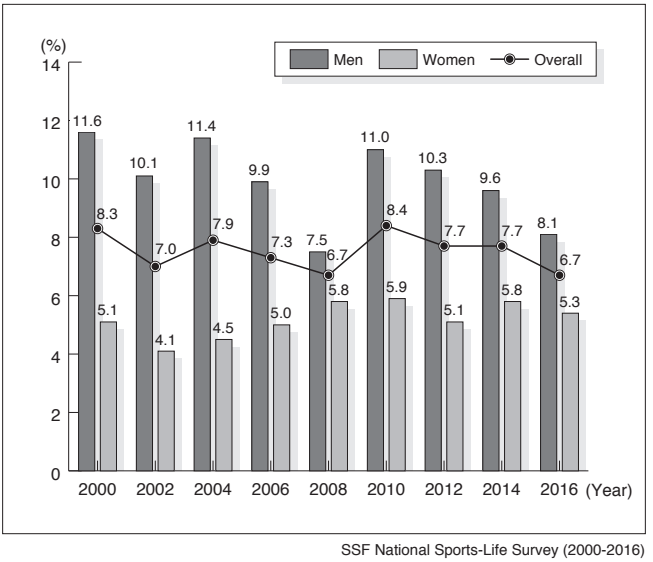
IV. Volunteering in Sports

1. Rates and Types of Volunteering in Sports among Adults

According to the "SSF National Sports-Life Survey", the rate of volunteering in sports among adults in Japan hovered at around 6-8% for the sixteen years from 2000 to 2016, which represents less than 10% of the total adult population (Figure 2-10). Based on the rate of 6.7% recorded in 2016, the total number of sports volunteers can be estimated at about 6.9 million people.

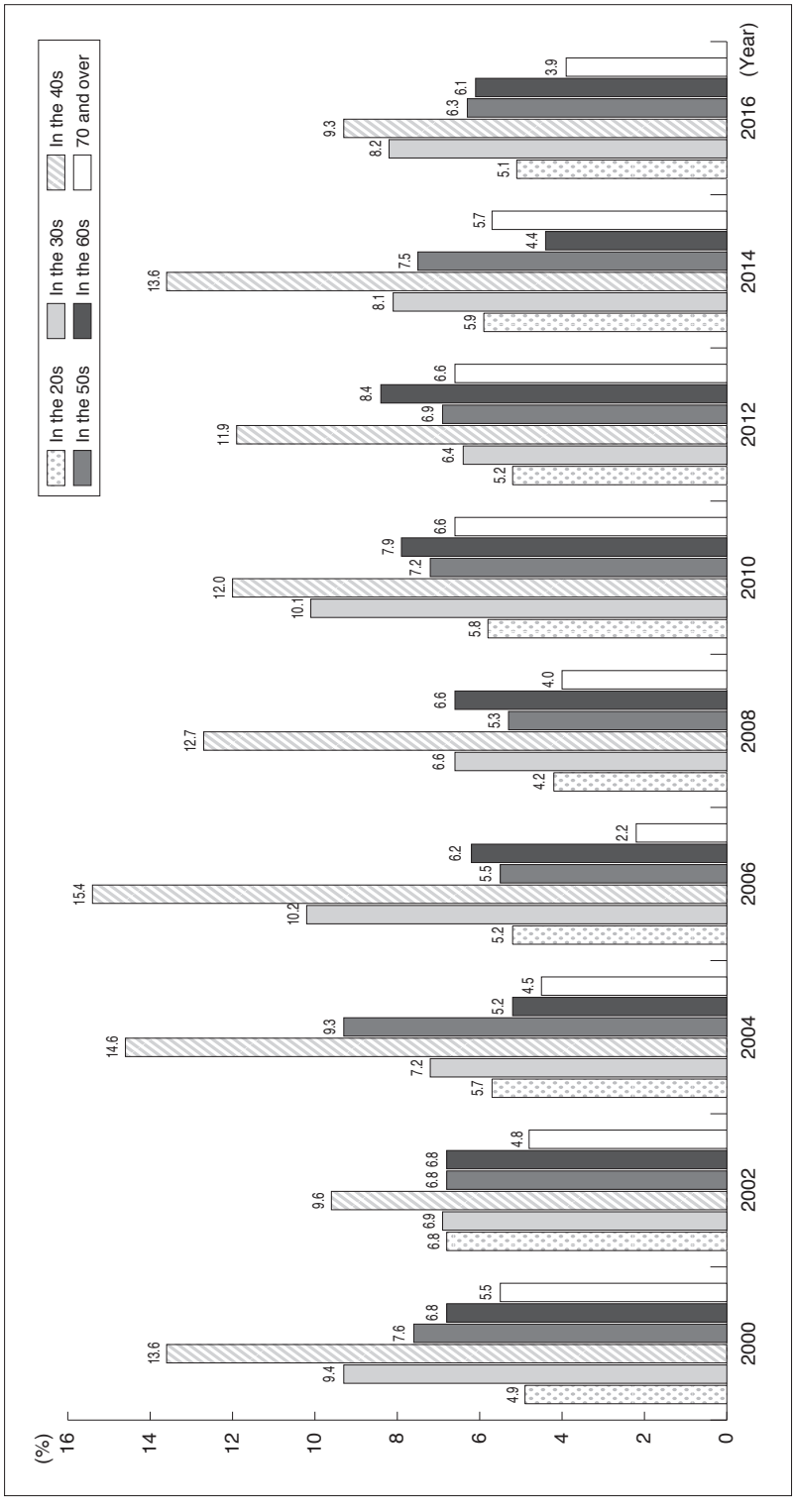
When the results were looked at by gender, the rate of volunteering in sports for men was twice as high as that of women in most of the surveys, indicating that the majority of volunteering is done by men. By age, the 40s age group had the highest rate (Figure 2-11).

The results of the 2016 survey can also be looked at concerning the types of volunteer in sports. "Running or helping sports events" at "Local sports events" was the highest ranked activity at 50.8%, followed by the same activity in "Day-to-day activities" at 36.4%, "Coaching" at 39.6%, and "Refereeing" at 22.1% (Table 2-20). In terms of the amount of times dedicated to the volunteer work per year, "Coaching" in "Day-to-day activities" was the activity with the highest frequency rate (44.3 times), followed by "Running or helping sports clubs" (28.7 times) and "Helping to manage sports facilities" (13.1 times).



SSF National Sports-Life Survey (2000-2016)

Figure 2-10 Rates of Volunteering in Sports among Adults (By Gender)



SSF National Sports-Life Survey (2000-2016)

Figure 2-11 Rates of Volunteering in Sports among Adults (By Age Group)

Table 2-20 Types of Volunteering in Sports (multiple answers)

Types of spors volunteer		Participation rate (%)	Frequency (times per year)
Day-to-day activities	Coaching	28.7	44.3
	Refereeing	22.1	11.1
	Running or helping sports clubs	36.4	28.7
	Helping to manage sports facilities	9.2	13.1
Local sports events	Refereeing	15.9	7.5
	Running or helping sports events	50.8	2.8
National and international events	Refereeing	2.1	1.7
	Running or helping sports events	6.7	3.2

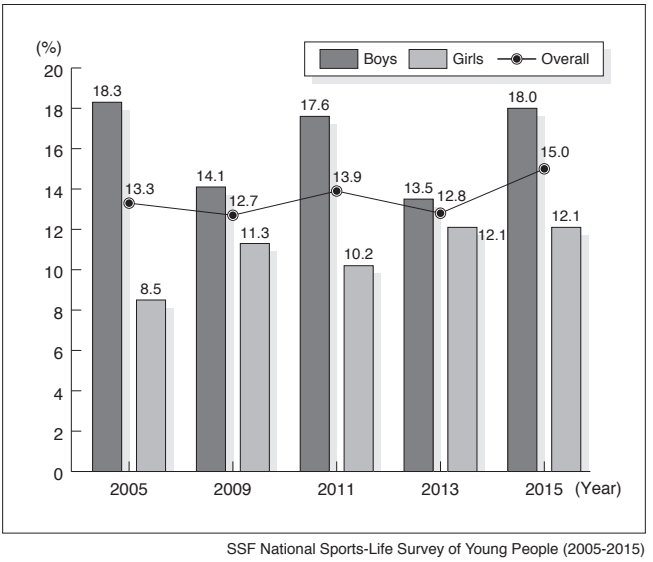
SSF National Sports-Life Survey (2016)

2. Rates and Types of Volunteering in Sports among Young People Aged 10-19 Years

The rates of volunteering in sports among young people aged 10-19 years can be assessed based on "The 2015 SSF National Sports-Life Survey of Young People". As shown in Figure 2-12, the rate of young people who responded that they had done any kind of volunteer work in sports within the previous year hovered consistently at around 12-15% for the ten years from 2005 to 2015, which is 6-7 percentage points higher than that of adults.

By gender, the rate of volunteering in boys (18.0%) was 5.9 percentage points higher than that of girls (12.1%), which suggests a similar trend to that observed in adults. By school year, volunteering in sports was done the most during junior high school years (19.5%), followed by high school (18.5%) and college (11.0%).

Looking at the types of volunteer work, "Judging or helping judges" was ranked the highest at 49.4%, followed by "Helping out at sports events" at 41.6%, and "Coaching or helping coaches" at 33.9% (Table 2-21). By gender, while "Judging or helping judges" was the highest for boys (58.1%), "Helping out at sports events" was the highest for girls (46.1%).



SSF National Sports-Life Survey of Young People (2005-2015)

Figure 2-12 Rates of Volunteering in Sports among Young People Aged 10-19 years (By Gender)

Table 2-21 Types of Volunteering in Sports by Young People Aged 10-19 years (multiple answers)

(%)

Types of spors voluneer	Overall	Boys	Girls	Elementary	Junior high	High	College
Coaching or helping coaches	33.9	31.0	38.2	36.4	28.0	36.7	36.0
Judging or helping judges	49.4	58.1	36.3	36.4	59.0	50.0	28.0
Helping out at sports events	41.6	38.7	46.1	59.1	35.0	39.8	56.0

SSF National Sports-Life Survey of Young People (2015)

Chapter 3
Financial Resources for Sports

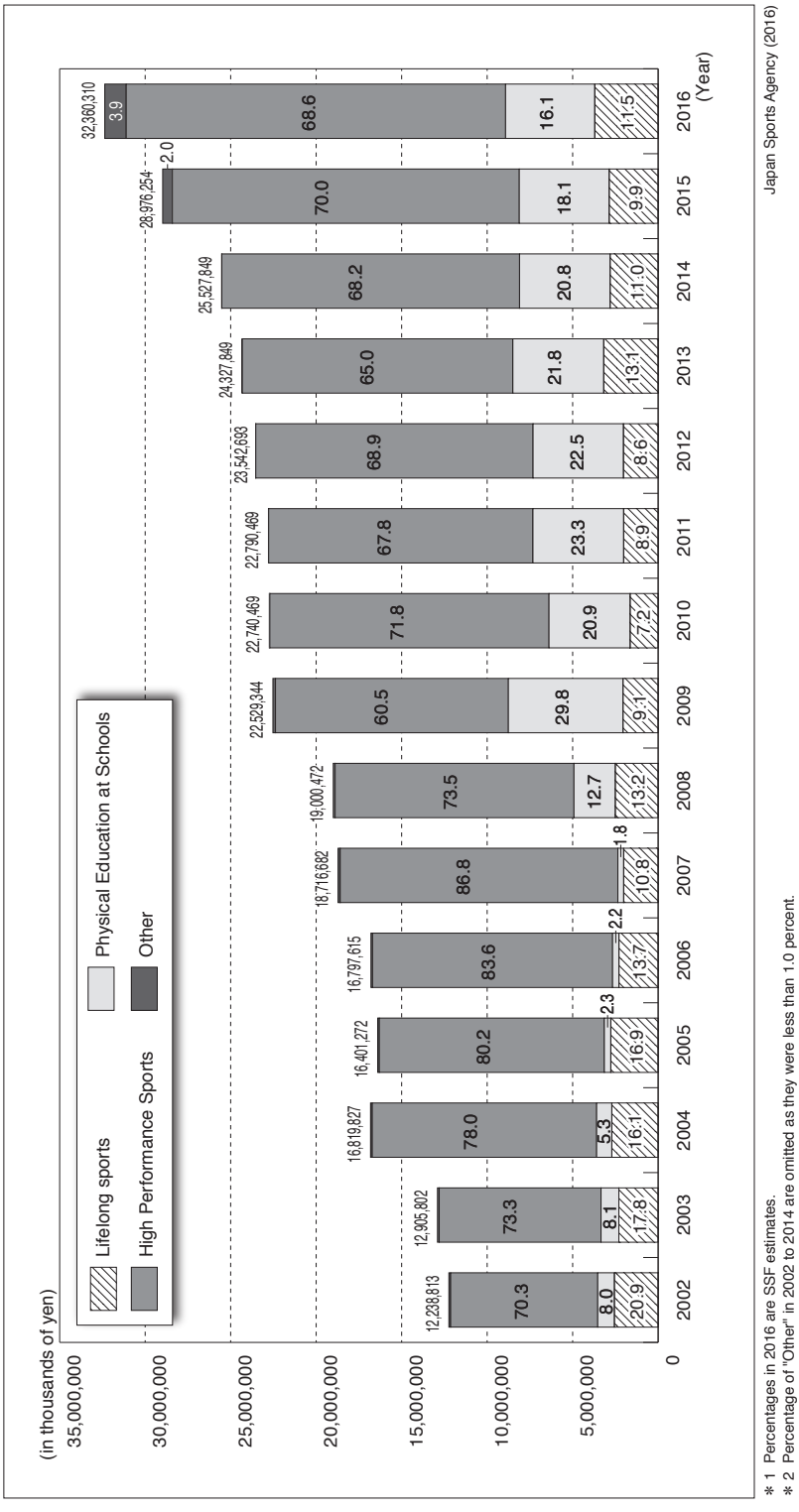
I. Financial Resources for Sports in Japan

1. National Budget for Sports

Figure 3-1 illustrates the yearly changes in the budgets of Sports and Youth Bureau at Ministry of Education, Culture, Sports, Science and Technology: MEXT (which previously administered sports before the establishment of the Japan Sports Agency in 2015) and the Japan Sports Agency: JSA. The sports budget for FY2002 was 12.2 billion yen, a number which increased to 16.8 billion yen in FY2004 due to a concerted effort to improve Japan's international competitiveness for the Athens Olympics held that year. Although the budget saw some marginal increases each year to FY2008, a revision of the government curriculum guidelines in 2007 made the teaching of martial arts a requirement, leading to budgetary increases related to the funding of martial arts halls for public junior high schools. As a result, the sports budget for FY2009 ballooned to 22.5 billion yen, surpassing the twenty-billion-yen threshold. Following that, the budget held mostly steady until FY2015, when the effects of Tokyo being selected in September 2013 to host the 2020 Olympic and Paralympic Games ("Tokyo 2020") prompted an increase to 28.9 billion yen and then a further increase to 32.3 billion yen in FY2016, breaking thirty billion yen for the first time.

The chart also divides the sports budgets into four categories: "Lifelong sports", "Physical Education at Schools", "High Performance Sports", and "Other". From the annual changes in how much percentage of the overall budget was allocated to each of these four categories indicated in Figure 4-1, "High Performance Sports" have been the greatest expenditure since FY2002, hovering around 70% since FY2010.

On the other hand, "Lifelong sports" fell from a ratio of 20% in FY2002 all the way to 7.2% by FY2010. Although the category saw some minor increases after that, it has remained limited to around 10%. As noted above, the portion of the sports budget that went to "Physical Education at Schools" increased to just under 30% in FY2009 due to funding for martial arts halls at public junior high schools, although it subsequently declined to 16.1% by the year FY2016. MEXT and JSA data published through FY2015 indicated the specific numbers for each of these four categories, but that



Japan Sports Agency (2016)

∗ 1 Percentages in 2016 are SSF estimates.
∗ 2 Percentage of "Other" in 2002 to 2014 are omitted as they were less than 1.0 percent.

Figure 3-1 Trends in the Sports Budget of MEXT and Japan Sports Agency

feature was not present in the data for 2016; SSF estimates were therefore used for that year in the chart.

2. Sports Promotion Funding from Public Interest Cooperations Subsidy Programs of the Japan Sport Council (JSC)

The Japan Sport Council uses proceeds from the Sports Promotion Lottery (known as "toto") and the operating profit of the Sports Promotion Fund to provide subsidies to sports organizations and local government bodies with the goal of promoting lifelong sports and improving international competitiveness.

Sports Promotion Lottery

In 1998, the "Act on Carrying Out, etc. Sports Promotion Lottery" was enacted to secure financial resources for sports promotion. Based on the law, a Sports Promotion Lottery was introduced in 2001 which allowed people across Japan to bet on the outcomes of J. League matches; since 2002, a portion of the lottery's profit has been used to operate subsidy programs for sports promotion.

Half of the proceeds from lottery sales are paid to the winners. Miscellaneous expenses as well as 10% for designated funds are then deducted from the other half; of the remainder, one-fourth is paid to the national treasury and three-fourths is used to subsidize the sports-promotion projects of municipalities and sports organizations (Figure 3-2). Designated funds are financial resources allotted for the maintenance of facilities that contribute to the efficient implementation of international sporting events, but are currently being used to construct the New National Stadium.

The subsidies provided to municipalities and sports organizations are allocated to projects focused on the promotion of lifelong sports—including the operation of comprehensive community sports clubs (see page.112) and local sporting events—as well as those related to improving competitiveness, for instance through the identification and development of talented athletes.

Sales for the "toto" lottery dropped by nearly one-fifth following its launch in FY2001, from 64.3 billion yen in the first year to 13.5 billion yen in FY2006 (Table 3-1). However, sales rebounded following the debut of "BIG" (which allowed predictions to be made randomly by a computer rather than chosen by lottery buyers) on September 16, 2006, reaching 63.7 billion yen in FY2007. Strong sales continued, and then in May 2012 the law was amended to allow lottery players to select not only J. League matches, but also those of foreign football leagues, allowing for sales to

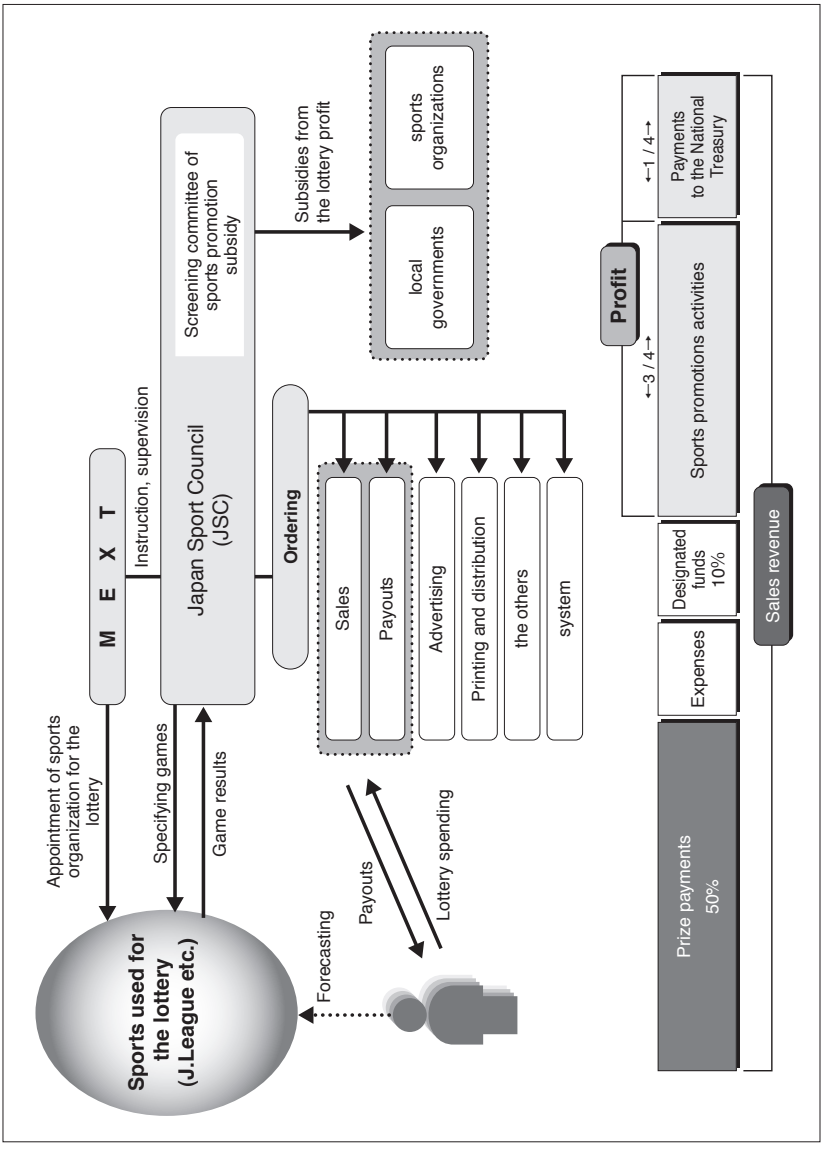


Figure 3-2 Sports Promotion Lottery System and Allocation of Sales Revenue (2016)

continue during seasons with no J. League matches. As a result, "toto" sales hit a record high in FY2013, exceeding 100 billion yen for the first time.

Sports Promotion Fund

The Sports Promotion Fund was created in 1990 through a government contribution of 25 billion yen. Established within the National Stadium and School Health Center of Japan, a predecessor of the JSC, the fund was intended to enhance high performance sports, as well as increasing participation in grassroots sports. Using operating capital of 29.4 billion yen, which was accrued by combining the initial government fund and an additional 4.4 billion yen donated by the private sector, JSC has been able to provide subsidies to sports organizations with the purpose of enhancing performance of athletes, hosting sporting events, and supporting activities of athletes and their coaches/instructors. However, a budget revision in 2016 eliminated half of the government's 25 billion yen contribution to allow that 12.5 billion yen to be used toward a share of the New National Stadium construction costs.

Table 3-1 Trends in Sales Proceeds from the Sports Promotion Lottery and Subsidy Amounts

(in millions of yen)

FY	Sales proceeds	Amount of Subsidies (Number of subsidized projects)
2001	64,267	—
2002	36,058	5,913 ＜1,644＞
2003	19,877	2,427 ＜1,311＞
2004	15,695	582 ＜291＞
2005	14,905	250 ＜269＞
2006	13,471	118 ＜185＞
2007	63,712	80 ＜116＞
2008	89,741	858 ＜348＞
2009	78,547	5,768 ＜1,210＞
2010	84,812	8,926 ＜1,562＞
2011	82,674	12,798 ＜2,620＞
2012	86,106	14,662 ＜2,802＞
2013	108,056	15,116 ＜2,841＞
2014	110,797	16,994 ＜2,742＞
2015	108,419	15,361 ＜2,384＞
2016	—	22,117 ＜2,295＞

Note1：The subsidy uses the proceeds of the previous year as the capital. The subsidized amount is the amount granted.
Note2：Those appropriated to subsidize sports activities for athletes and trainers are excluded.

Japan Sports Council (2016)

Total subsidies for the 2016 fiscal year amounted to 1.39 billion yen, which was on par with the totals for FY2010 and FY2013 (Table 3-2). But 800 million yen of that, which was earmarked for the athlete aid subsidy and the subsidy that supports the activities of athletes and coaches, was financed by the Sports Promotion Lottery via the strong sales of "toto"; the fund itself contributed 600 million yen to the subsidies.

Subsidies for Project to Enhance High Performance Sports

Under the subsidy program for projects to enhance high performance sports, government grants are distributed to the National Governing Bodies (NGB) of the Olympic sports and to the Japan Top Leagues (top ball leagues) and its alliance members in Japan. The aim of this program is to support athletes with the goal of surpassing the existing record of medals won at the Olympic Games, as well as reaching a record of prize winners in the World Championships (which is one of the policy goals set out in the Sport Basic Plan (2012)). For this subsidy program, there are two types of funding available: subsidies to "Sports Organizations' Enhancement Activities for Priority Sports" and subsidies to "Sports Organizations' Operational Activities of Top-League Teams". The budget for FY2016 included 295 million yen for these subsidies.

Financial Resources for Sports Promotion from Public Lotteries

Revenue derived from public gambling such as horse racing, powerboat racing, Keirin (cycling racing) and motorcycle racing has been utilized in various fields, and for projects contributing to the public interest such as social welfare and international development. Much of this revenue has also been apportioned to sports projects. From the 13.8 billion yen in revenue from public races, sports-related projects received 1.5 billion yen, accounting for approximately 10.9% of the total (Table 3-3).

The largest fund for sports projects was received in revenue from Keirin and motorcycle race, totaling approximately 950 million yen in FY2016 to subsidies for promoting bicycle and motorcycle races as well as sports. This was followed by 590 million yen in funds from boat racing, and 19 million yen from horse racing.

Some of the revenue from motorboat racing has been used for promoting life-long sports through the activities of the Sasakawa Sports Foundation (SSF). SSF implemented "SSF Sports Aid" and "SSF Water Sports Aid" over the years from 1991 to 2010. Sports Aid and Water Sports Aid opened applications from incorporated foundations and corporations, NPOs and other private organizations, resulting in a total of 5 billion yen

Table 3-2 Trends and Breakdown of Sports Promotion Fund Subsidies

(in thousands of yen)

Subsidy category \ FY	2010	2013	2016
	Subsidized amount <Number of subsidized projects>	Subsidized amount <Number of subsidized projects>	Subsidized amount <Number of subsidized projects>
1. Subsidy for sports organization's enhancement activities for athletes	332,990＜122＞	336,242＜43＞	33,660＜12＞
2. Subsidy for sports organization's hosting of sports events	394,715＜136＞	313,257＜128＞	565,190＜164＞
3. Subsidy for improvement activities of athletes and trainers[*1]	640,156＜588＞[*3]	640,150＜445＞[*3]	800,000[*3 *4]
4. Subsidy for athletes[*2]	—	—	
5. Subsidy for internationally competitive sports activities	0＜0＞[*5]	0＜0＞[*5]	0＜0＞[*5]
Total	1,367,861＜846＞	1,289,649＜616＞	1,398,850＜176＞

Note：the subsidized amount refers to the amount granted.

Japan Sports Council (2016)

＊1 Formerly named " Subsidy for the activities of athletes and instructors".
＊2 This category started in 2014.
＊3 Those allocated from Sports promotion lottery subsidies.
＊4 Based on the budget of 2016.
＊5 This does not mean that the subsidy category has been abolished, but only that there were simply no eligible projects for the subsidy.

Table 3-3 Funding for Sports Projects through Revenues from Public Gambling

(in thousands of yen)

Public gambling	The total amount provided to public interest projects <Number of projects subsidized>	The total amount provided to sports projects <Number of projects subsidized>	Ratio of total amount provided to sports projects to the amount provided to public interest projects (%)
Mortorboat racing *1	8,592,647 ＜2,504＞	592,274＜13＞	6.9
Horse racing *2	2,422,032 ＜35＞	19,031＜1＞	0.8
Keirin/Motorcycle racing *3	2,794,995 ＜245＞	948,371 ＜44＞	33.9
Total	13,809,674 ＜2,784＞	1,559,676 ＜67＞	11.3

＊1 The amount and number of subsidies from public interest or welfare-reated prjects. Based on the financial results for FY2015.
＊2 The amount and number of subsidies to farming promotion projects. Based on the budget of FY2016.
＊3 The amount and number of subsidies from grants to the promotion of public interest projects. Based on the financial results FY2016.

The Nippon Foundation, Japan Racing Association and JKA (2016)

being spent on 8,000 projects over 20 years. These projects include various events, classes and seminars held by a wide range of sports organizations. Since 2011, SSF has also been operating the Sasakawa Sports Research Grants Program to promote sports by supporting prominent research projects. This program provides funding for young researchers in the fields of humanities and social science, and subsidies that contribute to make national sports policies. Over the past three years, SSF has granted a total of 113 million yen to 174 research projects.

II. Financial Resource for Sports in Local Government

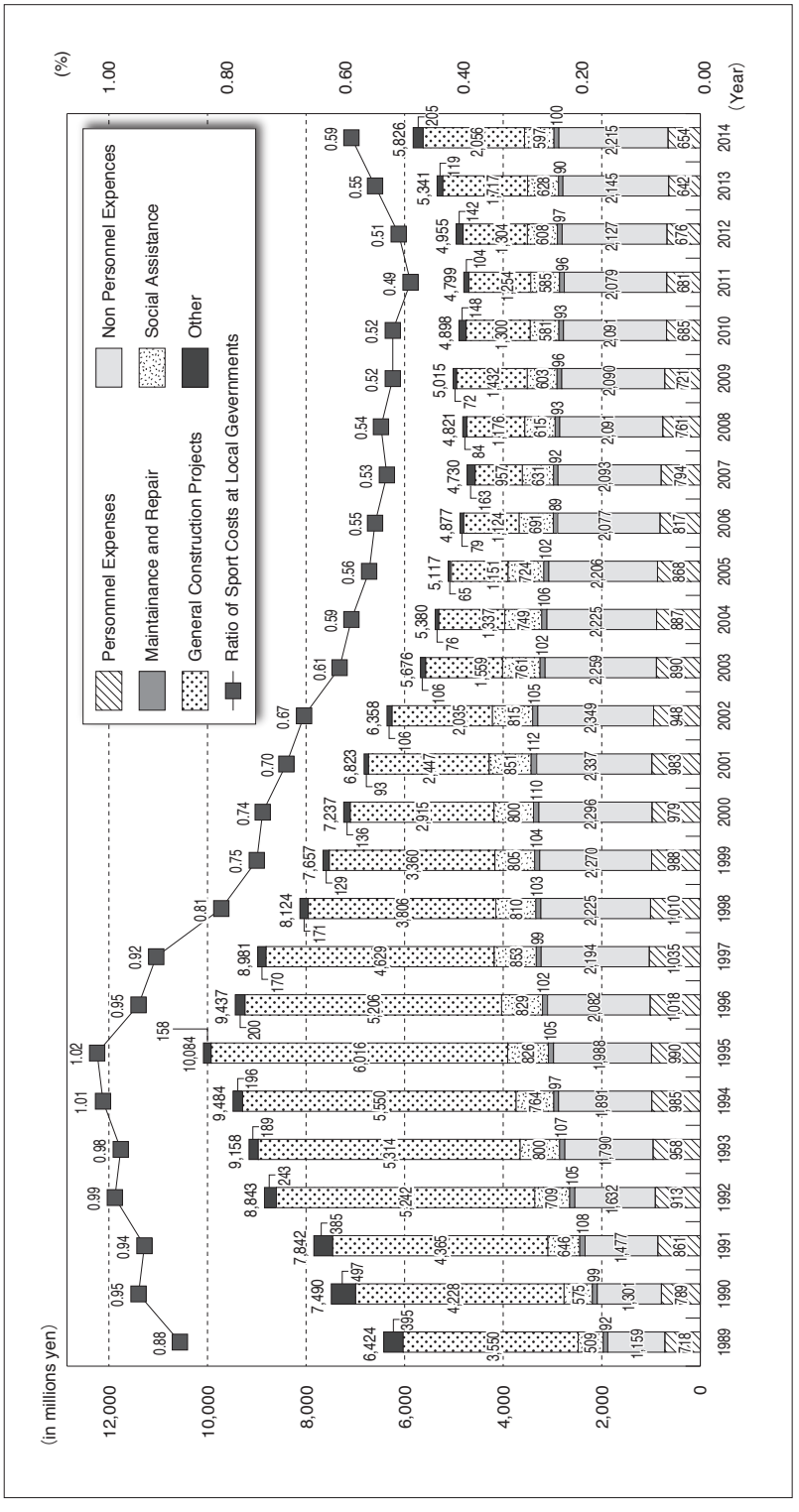
1. Costs related to Sports in Local Government

The Japan Sports Agency defines the "Physical Education Facility Costs etc." described in the Annual Statistical Report of Local Public Finance published by the Ministry of Internal Affairs and Communications as "costs related to sports in local government"; the yearly changes in these costs since 1989 are indicated in Figure 3-3. Costs related to sports in local government increased from 642 billion yen in FY1989 to a record high of 1,008 billion yen in FY1995. Following that peak, however, they began a continuous decline until FY2005, after which the costs hovered around 500 billion yen year to year. The costs began to increase again from FY2013 onward, reaching 582.6 billion yen in FY2014, or approximately half of that which was seen in FY1995. The percentage of total municipal expenditures that costs related to municipal sports comprised followed a similar trend, expanding from 0.88% in FY1989 to peak at 1.02% in FY1995. It then began an annual decline which bottomed out at 0.49% in FY2011; in FY2012, it began climbing again and reached 0.59% in FY2014.

Examining the breakdown of these sports-related costs, changes in the overall amount were influenced by fluctuations in general construction project costs. General construction project costs are funds invested into acquiring land for, building, or expanding fire-fighting facilities or public-works infrastructure like roadways, bridges, rivers, or harbors, educational facilities such as schools, and public facilities such as community centers and public housing. Here, the term indicates those funds that were used for sports-related costs. Totaling 355 billion yen in FY1989, general construction project costs subsequently increased to 601.6 billion yen by FY1995, when the total amount of sports-related costs were also at their peak. General construction project costs then decreased along with the total until FY2007, which was the lowest point for both them (95.7 billion yen) and overall sports-related costs (473 billion yen). Increases in general construction project costs were a major factor in overall cost increases from FY2013 onwards.

On the other hand, expenditures such as labor costs, maintenance and repair costs, and social assistance costs have only experience minor changes over this 25-year time span. It is worth noting that maintenance and repair costs have remained almost unchanged since FY1989 despite an increase in the number of public sports facilities. Non-personnel costs increased from 115.9 billion yen in FY1989 to a hight of 234.9 billion yen in FY2002.

Although they went on to decline following that peak, they still totaled 221.5 billion yen in FY2014, an increase of over 100 billion yen compared to FY1989. Non-personnel costs are generally a municipality's overhead costs that don't fall into the category of personnel costs, maintenance and repair costs, or social assistance costs; especially non-personnel costs including things such as employee travel expenses, the costs of procuring equipment, and contractor fees.



Annual Statistics on Local Public Finance, Ministry of Internal Affiars and Communications (1991-2016)

Figure 3-3 Trends in the Sports Related Costs of Local Governments

III. Funds for Sport Organizations

1. Funds for Independent Administrative Agencies and Sports Organizations

Independent administrative sports agencies and the governing bodies of each sport are the organizations that support the promotion of sports in Japan. These organizations obtain revenue through various means that include government grants, consignment fees from government bodies and membership fees from affiliated organizations. These funds are then used to help support a wide range of initiatives for promotion of sports.

Japan Sport Council (JSC)

The revenue of JSC was 168.5 billion yen for FY2015 (Table 3-4). The breakdown of this revenue included 109 billion yen in income from the Sports Promotion Lottery, 13 billion yen in grants from MEXT for operating expenses, and 2.1 billion yen in income from operating the National Stadium.

JSC's total expenditures for FY2015 were 178.6 billion yen. The breakdown for the expenditures in the lottery account included 54.2 billion in payments of lottery prizes, 9.6 billion yen in payments to the national treasury, 18.8 billion yen for operational expenses, and 16.6 billion yen for subsidy programs. Others included 935 million yen for the operational expenses of the National Training Center and 16.5 billion yen for the operational expenses of the Japan Institute of Sports Science (JISS).

Table 3-4 Revenue and Expenditure of Sports Organizations

Name of organization	Total amount for FY2015	
	Revenue(yen)	Expenditures(yen)
Japan Sport Council	168,571,107,800	178,682,228,293
Japan Sports Assciation	3,988,127,003	3,952,307,491
Japanese Olympic Committee	12,874,915,975	11,076,934,545
National Recreation Association of Japan	696,226,954	706,108,291
Japanese Para-Sports Association	2,060,011,444	2,009,228,747

Data from each organization (2016)

Japan Sports Association (JASA)

The revenue of JASA for FY2015 was 3.9 billion yen. The breakdown of this revenue included 1.6 billion yen from received subsidies, 200 million yen from donations, 1 billion yen in business profits and 778 million yen from registration fees (such as registration fees for certified sports instructors). The breakdown of the received subsidies included 1 billion yen in Sports Promotion Lottery subsidies (for supporting projects such as the establishment and development of Comprehensive Community Sports Clubs), 431 million yen in national subsidies (for projects such as the Japan-Korea Sports Exchange Program). Most of the accrued revenue from received donations came from the financial world.The JASA's total expenditures for FY2016 were 3.9 billion yen. The breakdown of these expenditures included 3.8 billion yen for operational expenses and 73 million yen for management expenses.

Japanese Olympic Committee (JOC)

The revenue of JOC for FY2015 was 12.8 billion yen. The breakdown of this revenue included 5.2 billion yen from received subsidies, 6.3 billion yen in business profits, and 1.1 billion yen from received corporate and non-corporate subsidies. The breakdown for the received subsidies included 4.6 billion yen in national subsidies (such as the grants for various sports organizations), 348 million yen in Sports Promotion Lottery subsidies, and 280 million yen in grants from other organizations including the International Olympic Committee (IOC). In terms of business profits, royalties from the use of the Olympic symbols (such as charges for the use of intellectual property, including marks, emblems and slogans) raised the highest amount of revenue at 6.2 billion yen.

The JOC's total expenditures for FY2015 were 11 billion yen. The breakdown of these expenditures included 3.6 billion yen for operational expenses, 2.4 billion yen for international sports exchange projects, 1.9 billion yen for training camp expenses, 1.5 billion yen for projects to improve coaching skills, 2.4 billion yen for international sports exchange projects, and 494 million yen for the operational expenses of the National Training Center.

National Recreation Association of Japan (NRAJ)

The revenue of NRAJ for FY2015 was 696 million yen. The breakdown of this revenue included 592 million yen in business profits and 86 million yen in received subsidies. The highest proportion of the business profits were generated from the registration of qualification certificates,

which amounted to 343 million yen.

The total expenditures for FY2015 were 706 million yen. The breakdown of these expenditures included 685 million yen for operational expenses and 21 million yen for management expenses.

Japanese Para-Sports Association

Financial records of the Japanese Para-Sports Association show a revenue of 2.06 billion yen for FY2015. Of this amount, 1.3 billion yen was from received subsidies, 320 million yen was from received donations, and 215 million yen was from operational proceeds. Private subsidies made up the highest percentage of received subsidies at 1.1 billion yen.

Expenditures for FY2015 totaled 2.0 billion yen. Of this number, 1.9 billion yen was spent on operational costs and 67 million yen on administrative costs. Operational costs consisted of expenses such as paid subsidies (1.0 billion yen) and contractor fees (210 million yen).

2. Structure of the Balance of Payments of the National Governing Bodies of Sports (NGBs)

Flow of Funds within the NGBs

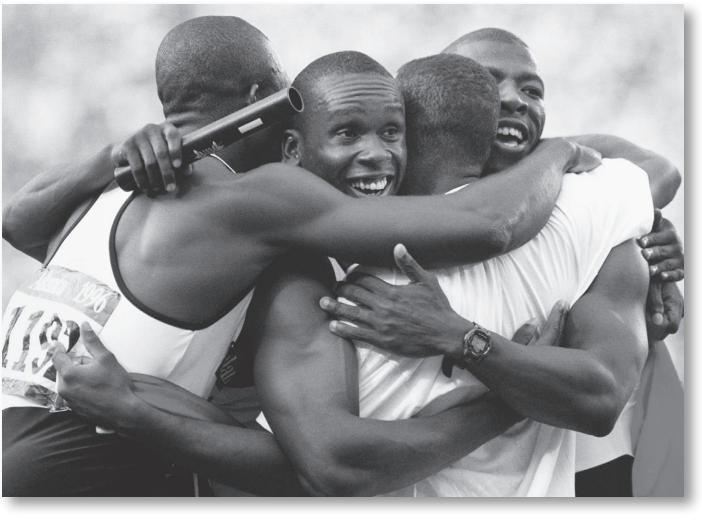
The revenue of NGBs was roughly divided into: "revenue from athletes/organizations", "business revenue", "subsidies/grants", "donations" and "asset management revenue." The breakdown of the "revenue from athletes/organizations" included annual membership fees and registration fees, which were expenses borne by each subject participating in a competition as an athlete, team or local organization. On the other hand, the "business revenue" included admission fees from spectators, financial support from sponsors and broadcasting right fees, which can be characterized as compensation for services provided by the relevant organizations.

The expenditures were largely divided into maintenance expenses, operating expenses and the cost of asset acquisitions. The detailed items included in the operating costs varied depending on each organization. The operating costs were categorized into "enhancement", "development" and "promotion" depending on its purposes. There were also many organizations that categorized the expenditure based on the outward form of the activity, such as "training camp or trip" or "holding competitions" rather than categorizing it based on the purpose of the activities.

Revenue Size of the NGBs

The distribution of revenue size is shown in Figure 3-4. The average annual revenue was 952 million yen. However, this average is not definite because of one particular organization having an annual revenue that is significantly higher (20.3 billion yen) than the others. The median was 353 million yen, the first quartile was 139 million yen and the third quartile was 795 million yen. The most frequent value (for 14 organizations) was less than 100 million yen. As these values indicate, there is a significant difference in the size of revenue among NGBs. Although it is difficult to conclude what a "typical size of the revenue" is, it may be reasonable to say that the median value of 200 million yen is the typical size for a NGB.

The total amount of revenue for all 62 organizations was 59 billion yen. For comparison purposes, the closing account for revenue in FY2015 was approximately 40 billion yen for JASA, and 12.9 billion yen for JOC. Except for one organization, the size of the revenue for each NGBs was significantly smaller than that of JASA or JOC, but it can be concluded that overall, a significant flow of funds is involved among NGBs.



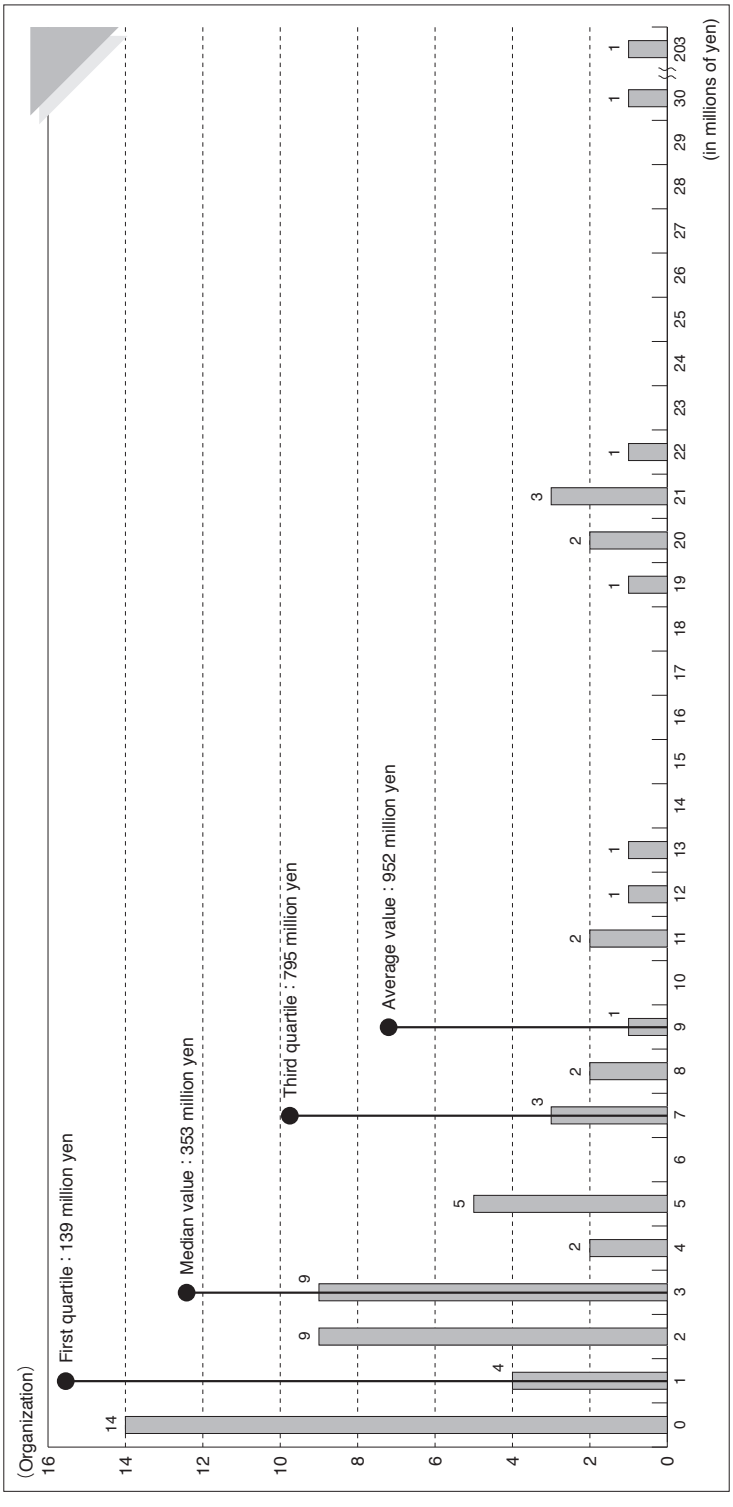


Figure 3-4 Distribution of Revenue Size (Budgets) for National Governing Bodies of Sports

IV. Gross Domestic Sports Product

In its report published in 2015, the Development Bank of Japan estimated that Japan's Gross Domestic Sports Product (GDSP) was 11.4085 trillion yen in FY 2012 (Table 3-5). The greatest contributor to the GDSP was "Government-Controlled Competitive Sports" (4.336 trillion yen), followed by "Facilities" (2.1148 trillion yen), "Retail" (1.667 trillion yen), and "Education" (1.5682 trillion yen). Total GDSP was 22.7% lower than the 14.751 trillion yen generated in FY2002. The largest changes occurred with the "Other" (Sports Promotion Lottery "toto" and sports insurance) and "Entertainment" categories, which increased by 156.1% and 132.7% respectively. Meanwhile, other categories decreased significantly; "Videos and Video Games" (-38.6%), "Facilities" (-35.8%), "Books and Magazines" (-33.0%), and "Government-Controlled Competitive Sports" (-28.6%).

The Japanese government has recognized sports as a key industry and is promoting strategic initiatives within the sports business world; as part of that push, Ministry of Economy, Trade and Industry and the Japan Sports Agency jointly launched the "Future Sports Development Conference" in February 2016. The government is trying to expand the scale of the sports industry from 5.5 trillion yen in FY2012 to 15.2 trillion yen by FY2025 in order to reach its GDP goal of 600 trillion yen. This 5.5 trillion yen number was calculated by adding "Retail" (1.7 trillion yen), "Entertainment" (300 billion yen), "Facilities" (2.1 trillion yen), and the total of "Leasing", "Travel", "Broadcasting and Newspapers", "Books and Magazines", "Videos and Video Games", and "Other" (1.4 trillion yen).

The government's plan to increase the GDSP by roughly 10 trillion yen is threefold: reforming stadiums and arenas, which will transform those facilities from cost centers to profit centers; strengthening the operation of sports content owners by increasing the revenue of national sports federations, and considering the creation of a Japanese equivalent of the United States' National Collegiate Athletic Association (NCAA); and enhancing the competitiveness of industries in the sports field by uniting it with other fields such as tourism, cuisine, and modern technology.

Table 3-5 Estimated Gross Domestic Sports Product (GDSP)

Category	Nominal GDSP as of 2002 (in ¥100 million)	Ratio (%)	Ratio (excluding public sports) (%)	Nominal GDSP as of 2012 (in ¥100 million)	Ratio (%)	Ratio (excluding public sports) (%)	Compared to 2002 (%)
Retail	19,166	13.0	22.1	16,670	14.6	23.6	-13.0
Entertainment	1,222	0.8	1.4	2,843	2.5	4.0	132.7
Facility	32,961	22.3	38.0	21,148	18.5	29.9	-35.8
Leasing	283	0.2	0.3	270	0.2	0.4	-4.6
Travel	8,356	5.7	9.6	7,419	6.5	10.5	-11.2
Education	17,091	11.6	19.7	15,682	13.7	22.2	-8.2
Broadcasting and Newspapers	4,937	3.3	5.7	4,175	3.7	5.9	-15.4
Books and Magazines	1,875	1.3	2.2	1,257	1.1	1.8	-33.0
Video and Video Games	469	0.3	0.5	288	0.3	0.4	-38.6
Other ※1	380	0.3	0.4	973	0.9	1.4	156.1
Government-Controlled Competitive Sports ※2	60,770	41.2	—	43,360	38.0	—	-28.6
Total	147,510	100.0	—	114,085	100.0	—	-22.7
Total excluding Public sports	86,740	—	—	70,725	—	—	-18.5

※1 Sports Promotion Lottery and sports insurance
※2 Public gambling sports.

Development Bank of Japan Inc. (2015)

Chapter 4
Sports Facilities

I. Current Status of Sports Facilities

1. Public, Private and School Facilities

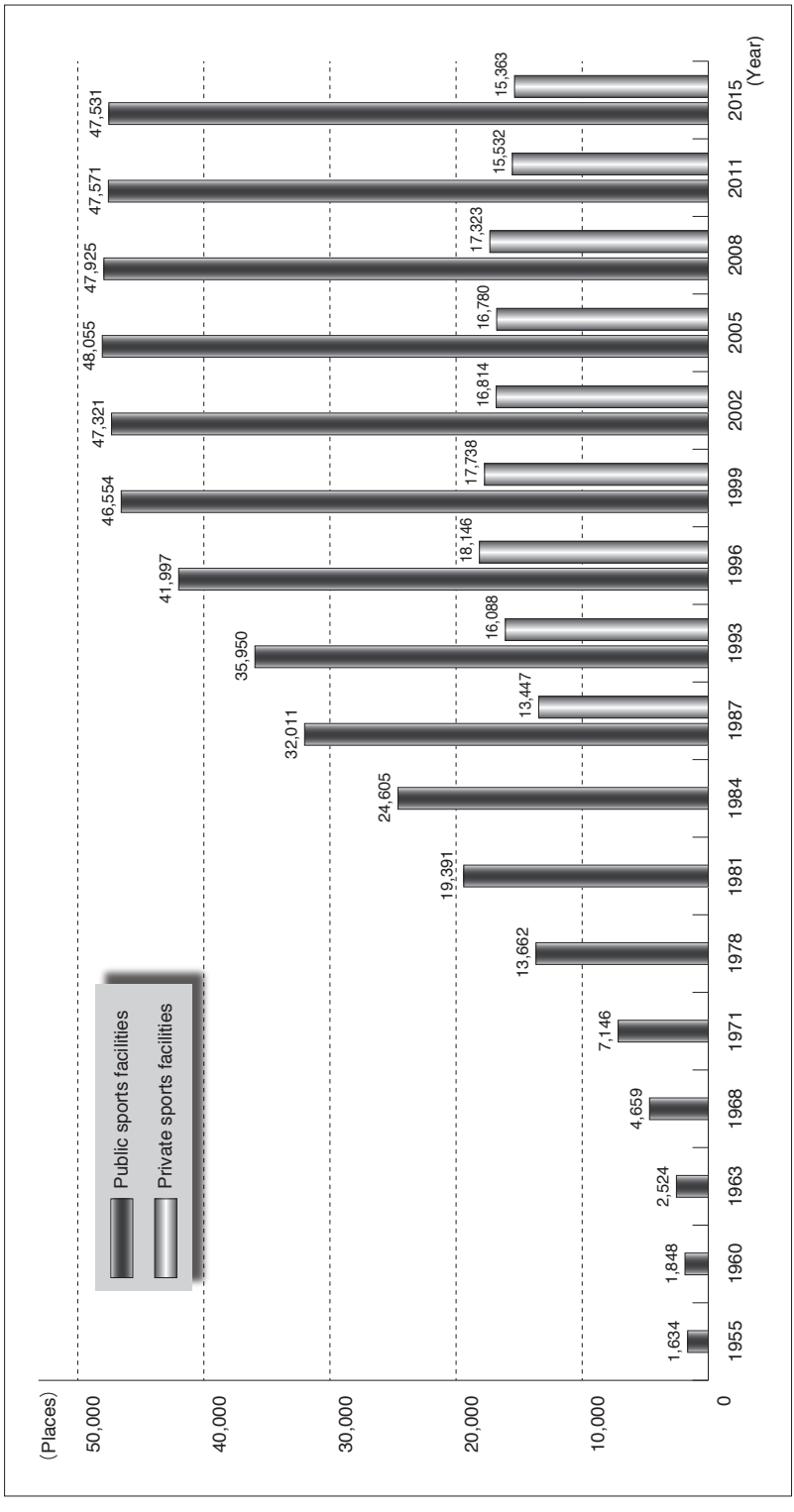
According to the "Social Education Survey" of Ministry of Education, Culture, Sports, Science and Technology (MEXT), the number of public sports facilities in Japan increased from the time the survey started in the 1950s through the 1990s. However, the number stayed almost at the same level after 2002. In 2011, the number of public sports facilities was 47,531 (Figure 4-1). On the other hand, the number of private sports facilities reached a peak in 1996 with 18,146, then continued to decline through 2015 where the number was recorded as 15,363.

Moreover, many schools and educational organizations own sports facilities such as gymnasiums, playgrounds and swimming pools, which are used for their physical education classes or school sports clubs. According to the "Survey on the Current Status of Facilities for Physical Education and Sports Activities" (2008) conducted by MEXT, there were 136,276 "school sports facilities" (in elementary, junior high, high, vocational schools, etc.) and 8,375 sports facilities at universities, colleges and technical colleges. In addition, the number of sports facilities for the welfare of employees amounted to 6,827, and 5,807 facilities were recorded being located with activity centers such as community centers, youth education facilities and women's education centers.

In Table 4-1, the number of public sports facilities and school sports facilities are shown by facility types. The public sports facilities were dominated by multi-purpose playgrounds (7,568), followed by gymnasiums (7,112), and baseball and softball fields (6,267). For school sports facilities, there were 37,339 gymnasiums, 35,933 multi-purpose playgrounds (with grounds of 992m^2 or more), and 28,171 swimming pools (outdoor).

2. Financial Resources for Sports Facilities

In Japan, public sports facilities are generally maintained or owned by the local government where the facility is located. Under the present difficult financial conditions, maintaining any facility can be a challenge, whether it be an existing public sports facility or any facility that has been



Social Education Survey (MEXT, 1955-2015)

Figure 4-1 Number of Public and Private Sports Facilities in Japan

newly constructed. Although the cost of maintenance or refurbishments for existing sports facilities is becoming a burden for local government, these facilities are still highly important for the local residents. Therefore, further efforts should be made by local governments to secure financial resources.

Table 4-2 shows some of the main subsidy and grant programs that are available for maintaining public sports facilities. These programs are financed by the national treasury, and the financial resources for maintaining public sports facilities mainly come from the general funds of local governments, municipal bonds, government subsidies and prefectural subsidies. Among those programs, the grants from Ministry of Land, Infrastructure, Transport and Tourism (MLIT) have been making a particularly strong contribution to maintaining public sports facilities.

Grant for School Facility Improvement

Funds required to implement the projects outlined in the facility improvement plans created by local municipalities in accordance with article 12-2 of the Act on National Treasury's Sharing of Expenses for Facilities of Compulsory Education Schools, etc. (2006) are provided by the national government in the form of the Grant for School Facility Improvement, as established in the first paragraph of the same article. This grant program began in 2011 and is under the jurisdiction of MEXT.

Until 2005, the Subsidy for Public Sports Facilities Maintenance

Table 4-1 Number of Public Sports Facilities and School Sports Facilities by Facility Types

	Public sports facilities	School sports facilities
Multi-purpose playgrounds	7,568	35,933
Gymnasiums	7,112	37,339
Baseball / softball fields	6,267	1,914
Tennis courts (outdoor)	4,810	9,542
Swimming pools (outdoor)	1,874	28,171
Gateball / Croquet fields	1,839	2
Training Centres	1,715	1,747

Social Education Survey (MEXT, 2015)
Survey on the Current Status of Facilities for Physical Education and Sports Activies (MEXT, 2008)

Table 4-2 Major Subsidy and Grant Programs for Sports Facility Maintenance

Ministry	Program	Period	Budget in 2015 (in hundred million yen)	Sports facilities	Subsidy rate
MEXT	Grant for School Facility Improvement	2011 ～	231	Public sports centers, public swimming pools, public outdoor sports centers, puclic martial arts centers, etc.	1/3
MLIT	Grant for Comprehensive Social Infrastructure Development	2010 ～	9,018	Facilities of city parks	1/2
				Lands of city parks	1/3
	Grant for Disaster Prevetion and Safety	2013 ～	10,947	Facilities of disaster prevention parks	1/2
				Lands of disaster prevention parks	1/3
METI/MEXT	Grant for Areas with Electric Power Stations	1974 ～	985	Gymnasium, swimming pool, sports ground, park, green area, ski resort, skating rink, camp ground, promenade, cyclyng road, etc.	The amount of the grant is determined by each municipality.
Ministry of Defence	Subsidies for Stabilizing People's Livelihoods	1974 ～	234	Green area and other public spaces at parks	6/10
				Green area and other public spaces at outdoor sports ground	2/3
				Sports and recreational facilities combined with exhibition and classes related to sports	7.5/10
				Sports and Educational facilities promoting international exchange	7.5/10
	Grant for Environmental Improvement of Areas with Specified Defense Facilities	1974 ～	360	Sports or recreational facility	The amount of the grant is determined by each municipality.
Ministry of Environment	Grant for Maintenance of Natural Environment	2005 ～	139	Nature trail at quasi National park	Up to 45%
		2015 ～		Nature trail at National park	1/2

MEXT：Ministry of Education, Culture, Sports, Science and Technology
MLIT：Ministry of Land, Infrastracture, Transport and Tourism
METI：Ministry of Economy, Trade and Industry

SSF Research on Subsidy and Grant System for Public Sports Facilities (2016)

provided the funds needed to maintain public athletics facilities, which make up a large percentage of public sports facilities. In line with the ideas set forth in the Sports Promotion Act (1961), this grant was offered to local municipalities with the intention of promoting sports by improving sports facilities; 1 billion yen was appropriated for this purpose in 2005 (Table 4-3). Then in 2006, the so-called "trinity reforms" (revision of the cost-sharing details of government grants, transfer of tax revenue sources, and revision of tax allocated to local governments) led to the Subsidy for Public Sports Facilities Maintenance and other grants being converted into the Grant for Safe and Reliable School Development. Then, the grant program was renamed in 2011 as Grant for School Facility Improvement, which how it is known today.

Table 4-3 Trends in the Amounts of Subsidies for Public Sports Facility Maintenance from MEXT

Fiscal year	Amount (in thousands of yen)	Program
2000	2,369,554	Subsidy for public sports facility maintenance
2001	1,472,114	
2002	1,286,094	
2003	1,169,080	
2004	1,060,420	
2005	1,023,000	
2006	49,499,000	Grant for safe and reliable school development ＊The amount of the subsidy for public sports facility maintenance is included in this grant, but its details are unknown.
2007	70,970,000	
2008	74,867,000	
2009	75,068,000	
2010	78,354,000	
2011	43,587,000	Grant for school facility improvement ＊The amount of the subsidy for public sports facility maintenance is included in this grant, but its details are unknown.
2012	24,339,000	
2013	39,477,000	
2014	19,731,000	
2015	23,094,000	
2016	28,188,000	

Note：Initial budget is shown. MEXT(2016)
Funding related to the National Stadium and the Nagano Winter Olympic Games is not included.

Subsidy for Community Sports Facility Maintenance

In addition to the government-funded subsidy programs, there is a subsidy program which is financed by revenue from the sales of the Sports Promotion Lottery (toto). This program, operated by the Japan Sport Council (JSC), is known as the "Sports Promotion Lottery Subsidy." Among the various subsidy programs offered under the Sports Promotion Lottery Subsidy, the "Community Sports Facility Maintenance Subsidy" and the "Large-Scale Sports Facility Maintenance Subsidy" are the two main programs available for sports facilities.

The Community Sports Facility Maintenance Subsidy supports three types of projects: maintenance of sports clubhouses, planting lawn on pitches, and maintenance of sports facilities. Subsidies are available to eligible candidates from local governments, sports associations and comprehensive community sports clubs with a corporate capacity. In 2016, a total subsidy amount of 7.19 billion yen was provided to 284 projects.

The Large-Scale Sports Facility Maintenance Subsidy is a program intended to support the maintenance of the stadiums of J. League clubs and the venues for the Winter National Sports Festivals. In 2016, a total subsidy amount of 3.81 billion yen was provided to 7 projects.

II. Sports Facilities for High Performance Sports

1. The National Training Center

For the purpose of enhancing Japan's international competitiveness, the National Training Center (NTC) was opened in 2008 (following the opening of the track and field training zone in 2007). It is currently the primary training center responsible for: (a) conducting intensive and continuous activities to enhance performance of athletes in a national team; (b) fostering junior athletes based on athlete development programs; and (c) improving the quality of instructors (national coaches) for high performance athletes.

The NTC is managed pursuant to the development policies of core facilities on a national level specified under the "Basic Plan for the Promotion of Sports", that was formulated by MEXT in September 2000. Based on these policies, its management was delegated to JSC.

2. Japan High Performance Sport Center

In May 2015, MEXT created an expert panel to discuss and conduct a research on a base for sustainable advancement of top athletes performance for international competitiveness. The panel's final report submitted in January 2016 identified the Olympic and Paralympic events as high performance sports based on the Basic Act on Sport (2011) and the Sport Basic Plan (2012). The report proposed combining the existing Japan Institute of Sports Sciences and the National Training Center, which is located in the Nishigaoka area of Kita Ward in Tokyo, into the Japan High Performance Center that would serve as a base for athlete enhancement and research activities. Since 2016, JSC has been teamed up with the Japanese Olympic Committee and Japanese Paralympic Committee to manage and operate the facilities.

3. Event-Specific Affiliated National Training Center Facilities

Since 2007, MEXT designated a number of existing facilities as "Event-Specific Affiliated National Training Center Facilities". The background for such designation is the need to establish a network between sports in which training facilities for elite athletes are available at the NTC, and those sports in which training facilities are not available at the NTC. This includes winter sports, water sports and outdoor sports, as well as high-altitude training. As of February 2017, 28 facilities have been designated as "Event-Specific Affiliated National Training Center Facilities" for 22 sports and a high-altitude training activity (Table 4-4).

Table 4-4 Event-Specific Affiliated National Training Center Facilities

Category	Sports category	Designated facilities	Location
Winter sports	Ski Jumping	Sapporo jump stadium (Okurayama, Miyanomori)	Hokkaido
	Nordic skiing	Hakuba ski jumping stadium and Hakuba cross country course	Nagano
	Speed skating	Nagano olympig memorial arena, "M-Wave"	Nagano
		Meiji Hokkaido-Tokachi oval (an indoor speed skating rink in the Obihiro-no-mori)	Hokkaido
	Figure skating	Chukyo university, "Aurora hall"	Aichi
	Short track speed skating	Teisan ice skate training center	Nagano
	Ice hockey	Tomakomai city Hakucho arena	Hokkaido
	Bobsleigh/luge	Nagano bobsleigh luge park, "The Spiral"	Nagano
	Curling	Karuizawa kazakoshi park arena curling stadium (Karuizawa ice park)	Nagano
	Biathlon	Nishioka biathlon stadium	Hokkaido
Water sports	Sailing	Wakayama sailing center (Dinghy marina)	Wakayama
	Boating	Toda park boat course & Toda boathouse	Saitama
	Canoeing sprint	Kibagata canoe course ※	Ishikawa
	Canoeing slalom	Toyama city sports canoe center	Toyama
Outdoor sports	Football	J-Green Sakai	Osaka
	Hockey	Gifu prefectural green stadium	Gifu
	Cyling	Japan cycle sports center ※	Shizuoka
	Equestrian	Gotenba horsemanship and sports center	Shizuoka
	Shooting raifle	Nagatoro shooting range	Saitama
	Shooting cray target	Kanagawa prefectual Isehara shooting range	Kanagawa
	Modern pentathlon	Japan Self-Defense Forces physical training school	Saitama
	Archery	Yamaha resort archery stadium, "Tsumagoi"	Shizuoka
	Rugby sevens	Kumagaya Sports Culture Park	Saitama
	Golf	Phoenix Seagaia Resort	Miyazaki
	Triathlon	Phoenix Seagaia Resort	Miyazaki
Others	Diving	Tokyo Tatsumi International swimming center	Tokyo
High-altitude training		Hida ontake kougen highland sports training area	Gifu
		Zao bodaira athlete village	Yamagata
Total：22 sports, 28 facilities			

※ Joint use with Paralympic athletes.
As of Feburary 2017.

Japan Sports Agency (2017)

Since 2016, NTC training centers focused on Paralympic events have also been designated. Fifteen facilities have been designated for 15 different events as of February 2017 (Table 4-5).

Table 4-5 Event-Specific Affiliated National Training Center Facilities for Paralympics

Sports category	Designated facilities	Location
Athletics	Tanabe Sports Park	Wakayama
Wheelchair tennis	The Yoshida Memorial Tennis Training Center	Chiba
Triathlon	Phoenix Seagaia Resort	Miyazaki
Football 5-a-side	ZOZOPARK HONDA FOOTBALL AREA	Chiba
Biathlon	Abashiri Shooting Range	Hokkaido
Para ice hockey	Yamabiko Skating Complex	Nagano
Wheelchair basketball	Chiba Port Arena	Chiba
Boccia	Osaka City MAISHIMA Sports Center for Persons with Disabilities	Osaka
Powerlifting	Kyoto Prefectual Welfare Center for People with Mental and Physical Disabilities	Kyoto
Sitting volleyball	Himeji city hall annex	Hyogo
Goalball	Tokorozawa Municipal Gymnasium	Saitama
Swimming	Paul Rusch Athletics Center	Tokyo
Wheelchair fencing	Former Kyoto City Sanno Elementary School	Kyoto
Total：15 sports, 15 facilities		

Total facilities includes 3 joint use with Olympic sports.
As of Feburary 2017.

Japan Sports Agency (2017)

III. Sports Facilities for People with Disabilities

1. Sports Centers for People with Disabilities

Sports centers for people with disabilities allow people with disabilities to have exclusive or priority access. These centers are equipped with a range of facilities, such as gymnasiums, swimming pools, playgrounds and training rooms, which have been designed to be more easily used by people with disabilities. The SSF "Research on sports facilities for people with disabilities" (2016) reported that there were 139 such facilities in Japan in 2015. Of these, 96.5% of facilities are equipped with gymnasiums, 41.2% with training rooms, 39.5% with swimming pools, 22.8% with playgrounds, 17.5% with archery ranges, 15.8% with table-tennis rooms, and 9.6% with tennis courts.

Along with universal design features, such as the elimination of steps, the installation of Braille blocks and barrier-free restrooms, to accommodate the needs of people with disabilities, these facilities also offer a variety of information resources to assist people with disabilities. Such resources include the use of visual displays for people with intellectual disabilities and an electronic bulletin board to assist people with hearing impairments. Moreover, tools and equipment that allow people with disabilities to participate in sports, as well as full-time disability sports instructors are available in most of the centers, which often serve as a community hub for disability sports activities.

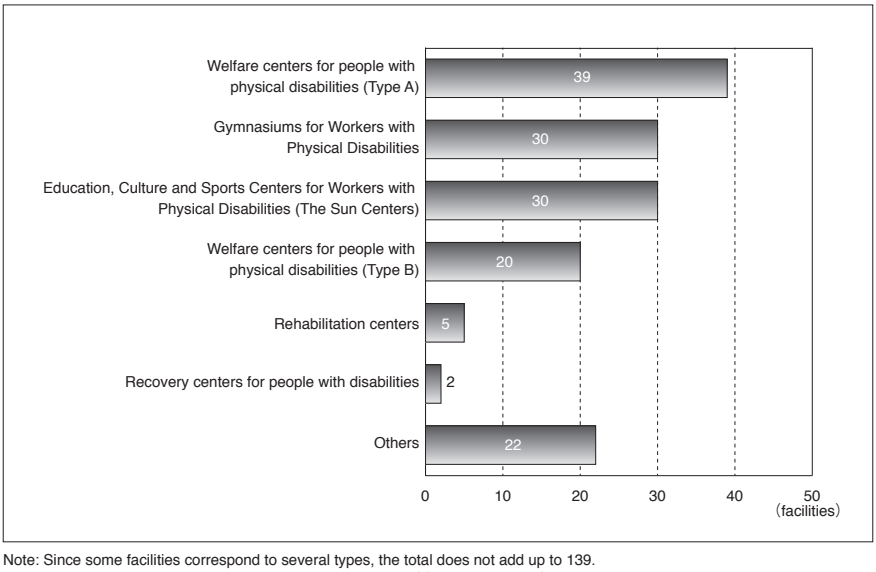
According to the same survey above, 85.5% of these facilities are run by designated managers, while 14.5% are managed directly by their local governments. Of the facilities with designated managers, 30.2% are managed by quasi-governmental social welfare corporations, 18.9% by social welfare councils, 10.4% by social welfare corporations and disability sports associations, and 8.5% by welfare associations for people with physical disabilities.

About half of the sports centers for people with disabilities were built in the 1980s, and only a few centers have been constructed since then. Based on the background purposes for their establishment, sports centers for people with disabilities can be divided into the following seven types (Figure 4-2). By March 2006, all type 2 and type 3 facilities was transferred to municipalities and they are currently being managed by a variety of organizations.

1. Welfare Centers for the Persons with Physical Disabilities (Type A)
   Facilities specified in the Act for the Welfare of Physically Disabled

Persons, aimed at supporting social participation of persons with physical disabilities.

2. Gymnasiums for Workers with Physical Disabilities
   Facilities formerly known as "Gymnasiums for Workers with Physical Disabilities" were established in 1961 by the Employment Promotion Corporation, with the aim of improving welfare and more stable employment of workers with physical disabilities.
3. Education, Culture and Sports Centers for Workers with Physical Disabilities (The Sun Centers)
   Facilities formerly known as "Education, Culture and Sports Centers for Workers with Physical Disabilities (The Sun Centers)" were also established by the Employment Promotion Corporation, with the aim of making use of available facilities to improve the physical functions, physical fitness, communication, education and cultural welfare of workers with physical disabilities.
4. Welfare centers for people with physical disabilities (Type B)
   Welfare centers as defined by the Act on Welfare of Physically Disabled Persons that are at least 424 square meters in size and offer creative activities, opportunities to be productive, encouragement to interact with the world, volunteer training, and other services that will help people with physical disabilities participate in society.



Note: Since some facilities correspond to several types, the total does not add up to 139.
SSF Research on Sports Facilities for People with Disabilities (2016)

Figure 4-2 Number of Sports Facilities with Exclusive or Priority Access for People with Disability by Categories

5. Rehabilitation centers
   Facilities that offer complete support services to people with disabilities, from functional recovery training to reentry into society.
6. Recovery centers for people with disabilities
   These welfare centers are designed for people with physical disabilities in order to improve their health and social participation by providing a place where they or family members can freely lodge, rest, or engage in recreation at.
7. Others
   Facilities that have been established by prefectures or ordinance-designated cities for purposes other than those listed above (1 to 6).

Usage of sports facilities with exclusive or priority access for disabled people

The method each sports facility with exclusive or priority access for disabled people uses to calculate visitor numbers varies; 54.0% of these facilities determine it by totaling the number of individuals who complete the sign-up process at the reception desk, while 36.5% count for the number of users of each section of the facility. All of the facilities that had over 10,000 total visitors (including people with disabilities) in 2014 are located in major cities and are ranked as follows, from most visitors to least (Table 4-6): Osaka City NAGAI Sports Center for Persons with Disabilities; Yokohama Rapport Sports & Cultural Center for Disabled; Tokyo Metropolitan Sports Center for the Disabled; Osaka City MAISHIMA Sports Center for Persons with Disabilities; Tokyo Metropolitan Tama Sports Center for the Disabled; Saitama Social Activities Center for the Disabled; Osaka Prefectural Community Center for People with Disabilities (Fine Plaza Osaka); and Kyoto Disabled Sports Center.

Sports participation for people with disabilities is expected to increase since the Act on the Elimination of Discrimination against Persons with Disabilities went into effect in 2016, thus sports facilities with exclusive or priority access for disabled people are anticipated to help handle new influx of disabled people to public sports facilities.

Table 4-6 Sport Facilities with Exclusive or Priority Access for Disabled People with more than 100,000 users (2012 - 2014)

Name of facilities	2012	2013	2014
Osaka City NAGAI Sports Center for Persons with Disabilities	241,504	248,294	253,860
Yokohama Rapport Sports & Cultural Center for Disabled	228,893	222,254	227,078
Tokyo Metropolitan Sports Center for the Disabled	152,522	154,586	157,977
Osaka City MAISHIMA Sports Center for Persons with Disabilities	151,754	151,353	156,434
Tokyo Metropolitan Tama Sports Center for the Disabled	127,592	129,957	128,634
Saitama Social Activities Center for the Disabled	126,278	129,039	122,039
Osaka Prefectural Community Center for People with Disabilities(Fine Plaza Osaka)	120,870	117,954	121,575
Kyoto Disabled Sports Center	99,179	101,582	101,325

SSF Research on Sports Facilities for People with Disabilities (2016)

Chapter 5
Human Resources for Sports

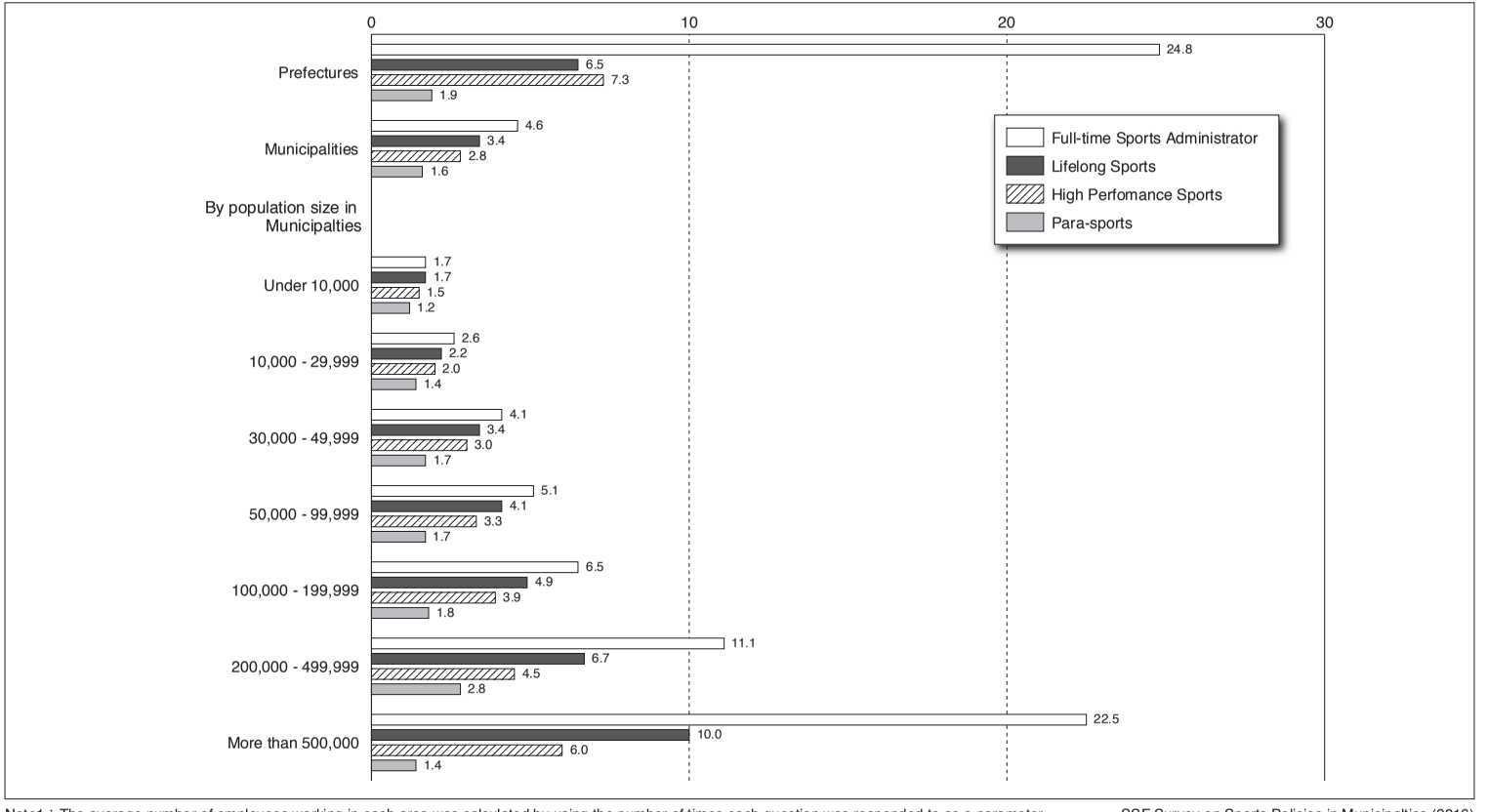
I. Professions in Sports

1. Human Resources in Local Sports Administration

Sports administration in prefectures and municipalities has mainly been governed by the local Boards of Education, pursuant to Article 23 and 24-2 of the "Act on the Organization and Operation of Local Educational Administration" enacted in 1956. However, after the revision of the Act in 2007, many local governments transferred the responsibilities of sports administration to their own jurisdiction. According to the "SSF All Municipalities Survey on Sports Promotion" (2016), as of 2015 the sports administration department was located within the governor's office for 44.7% of the 47 prefectures and within the mayor's office for 15.2% of the 1,188 municipalities that responded to that survey. In the 2010 survey, these numbers were 17.0% for the 47 prefectures and 8.3% for the 1,236 municipalities. Sports administration offices governed by local governments are often referred to as Sports Promotion Division or Health and Physical Education Division, depending on the municipality.

The survey revealed that 24.8 people on average were employed full-time in the sports administration departments in prefectures, with 6.5 people assigned to "lifelong sports", 7.3 people to "high performance sports", and 1.9 to "para-sports" (Figure 6-1). The average for the 1,188 municipalities was 4.6 people, of which 3.4 people were assigned to "lifelong sports", 2.8 people to "high performance sports", and 1.6 to "para-sports". That makeup differs from prefectures as the number of people for "lifelong sports" exceeds that for "high performance sports". Although the total number of employees expands as the population size of a municipality increases, "lifelong sports" always has most employees, followed by "high performance sports" then "para-sports". For municipalities with small populations, it is possible that a small number of employees are working in multiple areas simultaneously.

In addition to staff members who are in charge of sports administration in local governments, employees in affiliated organizations (such as Sports Promotion Foundations and Sports Associations) of other prefectures or municipalities engage in a variety of sports promotion activities within the local government.



Note1：The average number of employees working in each area was calculated by using the number of times each question was responded to as a parameter.
Note2：Since some employees work in multiple areas, the totals for the breakdown by area and the total number of employees may not match.

SSF Survey on Sports Policies in Municipalties (2016)

Figure5-1 Average number of employees in the sports administration departments of prefectures and municipalities (total and per area)

2. Human Resources in Sports Organizations

There are various sports organizations across Japan. With a few exceptions, the national governing bodies of sports (NGBs) serve as the main administering body of each sport, and have a number of affiliated organizations including prefectural associations. In order to understand the current number of staff members in NGBs who are engaged in the promotion of each sport, the results of the "SSF Census of the National Governing Bodies of Sports" (2017) were examined. The subjects of the survey were 87 sports organizations that were affiliated organizations of either Japan Sports Association (JASA), Japanese Olympic Committee (JOC) or Japan World Games Association (JWGA).

Staff members in National Governing Bodies of Sports (NGBs)

NGBs were asked for the number of staff members in each of the following positions: directors (full-time and part-time), auditors, councilors, regular employees, contract/commissioned workers, seconded employee (from sponsor companies, etc.), temporary workers, part-time workers, interns and others. The total number of staff members in the 61 organizations that responded to the survey was 3,536 people. Of this number, 1,286 were directors (including auditors), 1,397 were councilors and 853 were operating staff members (Table 5-1).

Table 5-1 Number of Staff members in National Governing Bodeis of Sports

Type	Men	Women	Total
Director (full- time)	73	14	87
Director (part-time)	944	118	1,062
Auditor	127	10	137
Councilor	1,288	109	1,397
Full-time employee	335	198	533
Contract/commissioned worker	70	69	139
Seconded employee	39	6	45
Temporary worker	8	51	59
Part-time worker	25	43	68
Intern	1	1	2
Others	4	3	7
Total	2,914	622	3,536

Note：The results show the total number of workers are in 61 affiliated organizations of JASA, JOC or JWGA that responded to the survey.

SSF Census of the National Governing Bodies of Sports (2016)

The average number of operating staff members (excluding directors and councilors) was 14.0 persons per organization. However, this number varied depending on the organization. For example, some organizations had no operating staff members, while another had 185. With regard to those organizations that had no operating staff members (4 organizations), it is assumed that the directors worked in various positions.

By gender, the proportion of men working as operating staff members was higher, accounting for 56.5% of the total while women made up the remaining 43.5%. Looking at the employment status of those operating staff, excluding directors and councilors, 62.5% were regular employees, 31.9% were non-regular employees (such as contract/commissioned workers, temporary workers and part-time workers) and 5.3% were temporarily seconded employees from other companies including sponsors and suppliers.

The average number of directors was 21.1 persons per organization, and 6.8% of these were full-time directors. By gender, male directors accounted for 89.0% of the total and female directors accounted for 11.0%, showing that female directors remained around 10%. Among the respondents, 10 organizations (16.4%) did not have any female directors present, and those that had two or fewer female directors accounted for 62.3% of the total respondents.

3. Human Resources in Sports Industries

In order to understand the number of employees in Japan's sports industries, the "Japan Standardized Industrial Classification" of the Ministry of Internal Affairs and Communications (MIC) was used to extract a list of all the sports industries in Japan. Then, the number of employees in each of those industries was obtained from "Economic Census" by the MIC. A total of 14 different types of industries were examined, all of which were not involved in any businesses other than those sports-related. The industry that had the highest number of employees was "golf courses" (with 126,429 people), followed by "sporting goods retailers" (85,599 people), "fitness clubs" (81,569 people) and "sports and health classes" (73,450 people) (Table 5-2). When all of the workers in these 14 industries were combined, the total number was 523,641 people. However, this is in fact accounting for only 0.85% of the total number of employees in all Japanese industries (61.78 million people in total) in 2014.

Compared to the results obtained in 2009, the number of sports-related employees in 2014 had decreased by 13,062 people but it showed some increase in 6 sports industries. This increase was particularly high in "gymnasiums" and "bowling alleys".

4. University Students and Faculty Members in Physical Education

The number of university students and faculty members in physical education and sports departments were examined based on the findings from the "Schools Basic Survey (for higher education institutions)" (2013 and 2015) conducted by MEXT. The total number of students in departments that were exclusively devoted to physical education and sports -"Faculty of Sports and Health Science", "School of Physical Education", "School of Health and Physical Education", "Department of Sports Science" and "Department of Sports"- was 28,124 in the survey conducted in 2004. However, new sports departments have been established every year since 2009, and the total number of those students studying sports has steadily increased to 41,106 in 2013 and 42,187 in 2015 (Table 5-3).

Table 5-2 Number of Employees in Sports Industries

Industries	Number of Workers		Increased/Decreased Number (%)
	2009	2014	
Sporting and athletic goods manufacturing	19,663	17,440	－2,223 （－12.7）
Sporting goods retailers	94,013	85,599	－8,414 （－9.8）
Sports and hobby goods rental outlets	3,149	3,940	791 （20.1）
Facilities for public gambling sports (horese race, bicycle race, motorboat tace and motorcycle race)	32,572	24,761	－7,811 （－31.5）
Sports facilities			
Gymnasiums	10,210	14,336	4,126 （28.8）
Golf courses	147,431	126,429	－21,002 （－16.6）
Golf ranges	31,324	28,258	－3,066 （－10.9）
Bowling alleys	12,592	19,009	6,417 （33.8）
Tennis clubs	3,097	2,491	－606 （－24.3）
Batting tennis centers	3,816	2,822	－994 （－35.2）
Fitness centers	73,981	81,569	7,588 （9.3）
Sports facilities (other than those above)	35,948	43,537	7,589 （17.4）
Sports and health classes	68,907	73,450	4,543 （6.2）

Economic Census (MIC, 2009 and 2014)

The number of students in other departments (such as Department of Education or Department of Human Sciences) who might have studied physical education or sports were not included in this survey. Thus, the actual total number of students may be greater than those obtained. Additionally, the number of faculty members in physical education and sports departments has increased from 1,328 in 2013 to 1,389 in 2015.

Table 5-3 Number of University Students and Faculty Members in Physical Education and Sports Departments

Department Name	2013			2015		
	Universities	Students	Faculty Members	Universities	Students	Faculty Members
Faculty of Sports and Health Science	2	1,654	54	10	7,898	276
School of Physical Education	12	23,051	747	12	22,356	744
School of Health and Physical Education	1	1,039	—	1	1,047	—
Faculty of Culture and Sports Policies Policy	1	1,146	39	1	1,190	34
Faculty of Sports and Health Studies	7	5,339	173	Included to Faculty of Sports and Health Science		
Department of Sports Science	3	4,777	167	3	5,272	170
School of Health and Sports Science	1	558	17	1	750	20
Department of Sports	2	2,380	81	2	2,443	81
School of Lifelong Sports	1	778	29	1	859	42
Department of Sports and Human	1	384	21	1	372	22
Total	31	41,106	1,328	32	42,187	1,389

Schools Basic Surveys (MEXT, 2013 and 2015)

II. Sports Instructors

1. Sports Instructor Qualification Scheme

Japan's Sports Instructor Qualification Scheme was developed from the qualification system established by the Minister of Education in 1987 ("Assessment Project of Knowledge and Skills of Social Sports Instructors"). This was an instructor development project implemented by sports organizations. Instructors who satisfied the standards determined by the Ministry of Education (currently MEXT) received a so-called "stamp of approval", indicating that their level of knowledge and skills was officially recognized. Previously, the Japan Sports Association (JASA) had launched the Instructor Qualification Scheme for each sport in 1977 (which was somewhat similar to the current scheme) with the cooperation of NGBs. There were only about 32,000 people registered for certification till 1988. In 1989, the scheme was revised, and was incorporated into the project authorized by the Minister of Education. As a result, more people were interested in obtaining an instructor qualification and the number of registered instructors exceeded 50,000 in 1994.

With the trends of administrative reforms, since 1996 ministry approval towards any qualification scheme operated by a public interest corporation is required to be in accordance with the Act. This came to be recognized as the "Regulations relating to Assessment Project of Knowledge and Skills of Social Sports Instructors" of the Ministerial Ordinance, specified based on Article 11 (Improvement of Instructors) of the "Sports Promotion Act". All organizations operating the qualification scheme (including JASA, NGBs and National Recreation Association of Japan (NRAJ)) became the government-authorized qualification providers. However, in 2002 the Cabinet office approved the "Implementation Plan for the Reform of Modalities in the Administration of Public Service Corporations" and abolished the Minister's responsibility to ensure the legality of examinations conducted by public service corporations at the end of 2005.

After this abolition, the JASA reshaped their qualification scheme, and has been operating their officially authorized "Sports Instructor Qualification Scheme" ever since. In response to Article 11 (Training of Instructors) of the "Basic Act on Sport", the Sport Basic Plan (2012) has set the following new policy goals: promoting the training of sports instructors, taking into account the needs of local residents and sports organizations; effectively utilizing qualified sports instructors; training sports instructors that can contribute to the success of high performance sports; and enriching the career paths of top-level athletes and sports instructors.

2. JASA Sports Instructor Qualification Scheme

Table 5-4 shows the five categories and 16 different types of qualifications that are offered by JASA. With the cooperation of NGBs, JASA provides "Qualifications of Instructors for per Competition" which are intended to train instructors of each sport, and are composed of six types of qualifications according to their age and level of skills. To date, JASA has trained instructors in over 50 different types of sports.

The "Fitness Regime Qualifications" include: "JASA Sports Programmer" which is a qualification to offer guidance for the maintenance

Table 5-4 Number of Registered JASA Certified Sports Instructors

Category	Title	Number of Registered Instructors	
		2013	2016
Basic Qualifications of Sports Instructors	JASA Sports Basic Leader	247,824	324,712
Qualifications of Instructors for each Competitions	JASA Coach I	104,309	108,381
	JASA Coach II	14,784	12,764
	JASA Coach III	14,988	17,481
	JASA Coach IV	5,092	5,492
	JASA Instructor I	3,830	3,290
	JASA Instructor II	1,549	1,325
Fitness Regime Qualifications	JASA Sports Programmer	4,759	3,647
	JASA Fitness Trainer	684	472
	JASA Junior Instructor	5,436	4,544
Medical Conditioning Qualifications	JASA Athletic Trainer	2,078	3,027
	JASA Sports Doctor	5,512	5,806
	JASA Sports Dentist	—	136
	JASA Sports Dietician	127	212
Sports Management Qualifications	JASA Assistant Club Manager	5,096	5,551
	JASA Club Manager	326	397
Former Qualifications	Sports Trainer I	55	32
	Sports Trainer II	128	76
Total (excluding sports leaders)		168,753	172,633
Total (including sports leaders)		416,577	497,345

As of October 1, 2016 JASA (2013 and 2016)

Note : JASA Sports Dentist was officially recognised from April 2015.

and improvement of fitness to adults; "JASA Fitness Trainer" which is for professional fitness instructors to provide various basic fitness training at private sports facilities; and "JASA Junior Instructor" which is a qualification to teach children about physical fitness and motion facilitation through play at local sports clubs.

The "Medical Conditioning Qualifications" include the following four qualifications: "JASA Athletic Trainer" which is a qualification to provide instruction in sports injury prevention and rehabilitation; "JASA Sports Doctor" to undertake the health care, injury prevention, diagnosis and treatment of athletes; "JASA Sports Dietician" to provide nutritional guidance to athletes and enhance their athletic performance; and "JASA Dentist" has been added since 2015 to diagnose, treat, prevent and research impairment or injury in dental and oral area caused by sporting activities.

The "Sports Management Qualifications" are targeted at individuals who are involved in the management of comprehensive community sports clubs. The "JASA Assistant Club Manager" is designed to develop staff members who possess the basic knowledge necessary for the management of comprehensive sports clubs, and qualified individuals who are expected to support activities related to club management. The "JASA Club Manager" is targeting the individuals to improve their management skills including securing and enhancing the effective use of financial resources to ensure the sound management of sports clubs.

In addition to JASA Sports Doctor qualification mentioned previously, other sports-related qualifications are offered to physicians by Japan Medical Association Certificate of Accreditation for Sports Health Physicians and Japanese Orthopedic Association Certificate for Sports Physicians.

Number of Registered Instructors

As of October 2016, there were 497,345 qualified instructors registered with JASA (Table 5-4). The number of those registerd as "JASA Sports Basic Leaders" has significantly increased, primarily because of a change in the calculation method. Excluding those Sports Basic Leaders, the total number of certified instructors in 2016 increased by about 4,000 people, when compared to that number in 2016.

By sports, the number of registered instructors was highest for "football" (35,547), followed by "swimming" (17,343), "volleyball" (15,759) and "softball" (12,697) (Table 5-5).

3. Disability Sports Instructor Qualification Scheme

The Japanese Para-Sports Association (JPSA) has established the "Para-Sports Instructor Qualification Scheme" to train and certify six types of instructors in order to accommodate the participation of people with disabilities in various sports activities. The "Beginner's Para-Sports Instructor" is to help people with disabilities within the community to integrate sports into their daily lives; "Intermediate Para-Sports Instructor" can provide sports instruction to people with disabilities at a prefectural level; "Advanced Para-Sports Instructor" provides advanced sports instruction to people including people with disabilities and other instructors at a prefecture or region level by utilizing their specialized knowledge and skills as well as advanced teaching techniques; "Sports Coach" is to train and develop specific skills of para-athletes and organizations in certain sports. JPSA also offers qualifications such as "Para-Sports Physician", who is qualified to work for the improvement of the physical health and performance level of para-athletes from the medical point of view, and "Para-Sports Trainer" to support the safety management and improve the performance level of para-athletes (Table 5-6).

Table 5-5 Number of Registered JASA Certified Sports Instructors per Sport

Sport	Number of Registered Instructors	
	2013	2016
Football	32,386	35,547
Swimming	19,729	17,343
Volleyball	14,666	15,759
Softball	13,449	12,691
Basketball	6,350	8,767
Tennis	5,429	4,723
Kyudo (Japanese Archery)	4,214	4,687
Karate	4,084	4,633
Ski	4,850	4,099
Table tennis	3,466	3,161
≀		
Total	144,552	148,733

As of October 1, 2016 JASA (2013 and 2016)

Table 5-6 JPSA Certified Sports Instructor Qualifications

Category	Number of Registered Instructors	
	2013	2016
Beginner's Para-Sports Instructor	17,965	19,278
Intermediate Para-Sports Instructor	2,502	3,117
Advanced Para-Sports Instructor	686	758
Sports Coach	125	152
Para-Sports Physician	234	395
Para-Sports Trainer	75	132

As of December 31, 2016 JPSA (2013 and 2016)
Note: Sports coaches include those certified as Advanced and Intermediate Para-Sports Instructors.

Chapter 6
Sports Clubs

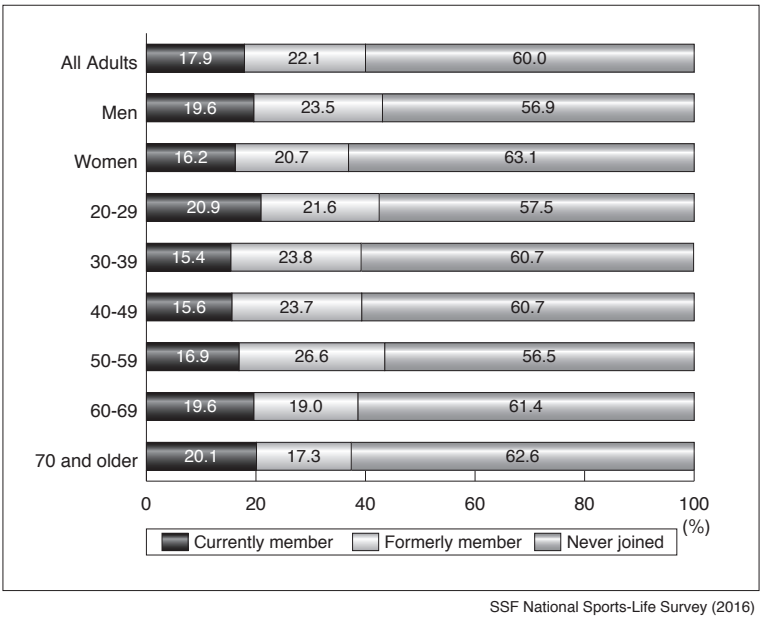
I. Sports Club Memberships for Adults

1. Membership Trends and Types of Sports Clubs

Membership Trends

According to "The 2016 SSF National Sports-Life Survey", the percentage of adults who were enrolled in a sports club, team or group (hereinafter collectively referred to as a "sports club") was only 17.9% (Figure 6-1). The MEXT's "Public Opinion Poll on Physical Fitness and Sports" (2013) showed a similar result that only 16.2% of adults were enrolled in sports clubs.

With regard to gender, the proportion of men who were enrolled in a sports club was 19.6%, which was 3.4 percentage points higher than that of women (16.2%). Conversely, in terms of those who were not enrolled in any sports clubs, the proportion of women was 6.2 percentage points higher (63.1%) than that of men (56.9%).



SSF National Sports-Life Survey (2016)

Figure 6-1 Membership of Sports Clubs

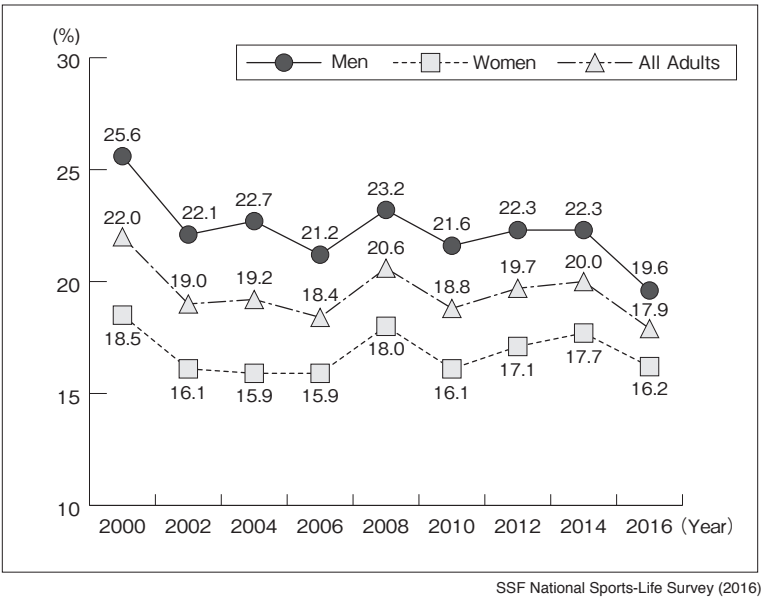
By age groups, the 20s age group showed the highest membership rate of 20.9%, followed by the over-70s age group with 20.1% and the 60s age group with 19.6%, indicating that one in every five individuals are currently enrolled in a sports club. In terms of those who were not enrolled in any sports clubs, non-membership rates among the four age groups other than the 20s and 50s reached over 60%.

Figure 6-2 shows the trends in the rate of sports club membership based on the findings of "The SSF National Sports-Life Survey" over the past 16 years. The proportion of adults who were enrolled in a sports club remained at around 20% from 2002 to 2016. Although it showed slight increase since 2010, it dropped by 2.1 percentage points from the previous survey in 2016 (17.9%).

Membership Status by Types of Sports Clubs

Figure 6-3 shows the types of sports clubs that people participate in. The most popular clubs were "community sports clubs (mostly managed by local residents)" at 33.2%, followed by "Friends and acquaintances' clubs", "private sports clubs / fitness clubs", "workplace clubs" and "alumni clubs".

By gender, the proportion of women who were members of "community sports clubs" was 8.2 percentage points higher (37.7%) than men (29.5%). The same trend was observed in "private sports clubs", with



SSF National Sports-Life Survey (2016)

Figure 6-2 Trends in the Rate of Sports Club Memberships

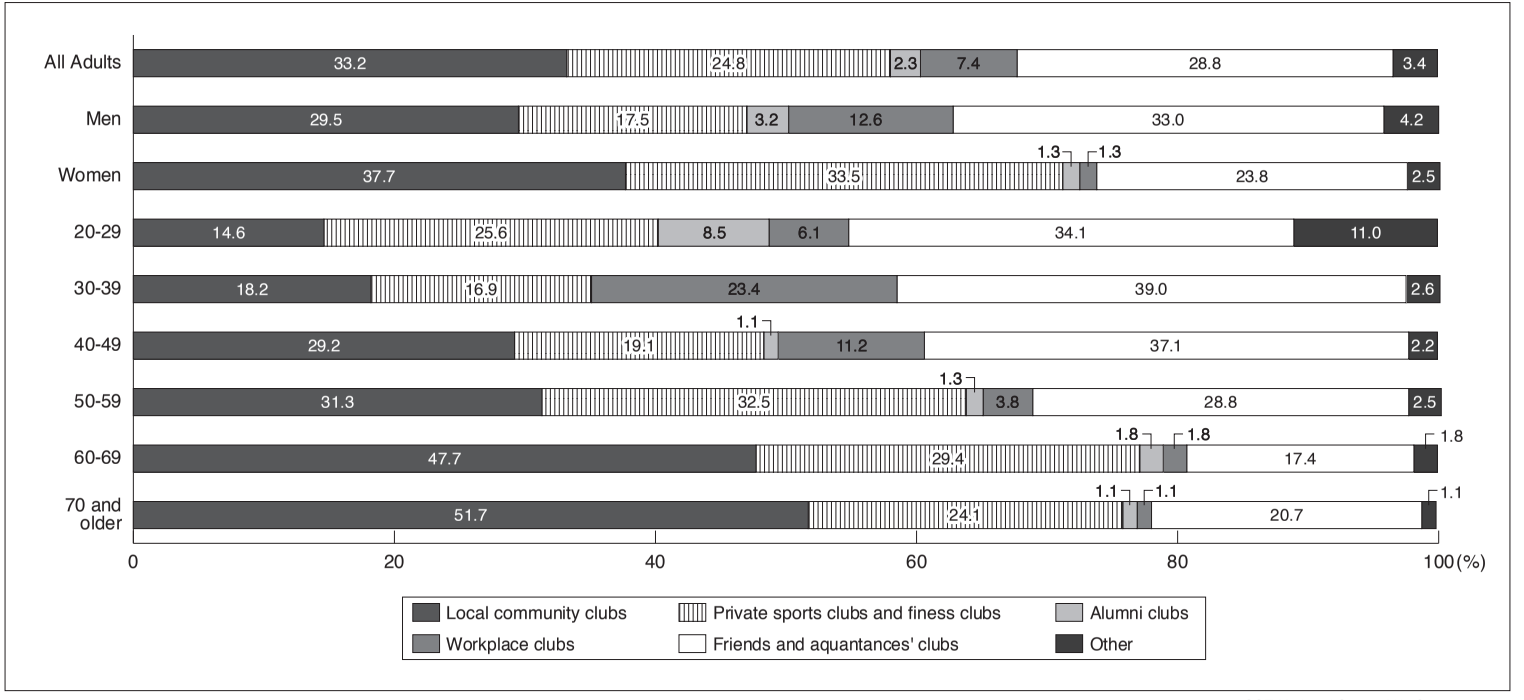
women (33.5%) leading men (17.5%) by 16.0 percentage points. By age groups, the proportion of "Friends and acquaintances' clubs" were 34.1% at the 20s age group, 39.0% at the 30s age group and 37.1% at the 40s age group, indicating that more than one-third of adults were enrolled. The proportion of "community sports clubs" increased as the age group increased, and exceeded 50% in the over-70 age group, clearly showing that community sports clubs played an important role for seniors to participate in sports.

Among respondents who were not currently enrolled in any sports clubs, the proportion of those who would like to become a sports club member was 19.4%. This figure has not been changed since the rate (19.6%) reported in the previous survey (2014). By gender, the proportion wanting to enroll in a sports club was higher in women, and by age the 20s and 40s age groups were the highest.

2. Sports and Physical Activities in Sports Clubs

According to the "The 2014 SSF National Sports-Life Survey", sports and physical activities performed in sports clubs include "calisthenics (including radio exercises, workplace exercises, aerobics and jumping rope)", which were the most popular type of activity at 6.0%, followed by "golf on a course" at 5.0%, "baseball" at 4.3%, "weight training" at 3.6% and "yoga" at 3.3%.

By gender, "golf on a course" ranked as the most played sports for men at 8.9%, followed by "baseball" at 8.3%, "softball" and "football" both at 4.6%, and "futsal, (five a side football)" at 3.9%. Meanwhile, women ranked "calisthenics (including light exercise and radio exercises)" as the most enjoyed activity at 8.6%, followed by "yoga" at 6.3%, "weight training" at 4.2%, "volleyball" at 2.9% and "walking" at 2.7%.



SSF National Sports-Life Survey (2016)

FIgure 6-3 Types of Sports Clubs

II. Participation in Sports Clubs and School Sports Clubs by Children and Young People

1. Sports Club Membership for Children Aged 4-9 Years

In "The SSF National Sports-Life Survey for Children (2015), respondents were asked about their enrollment in school sports clubs, private sports clubs (such as swimming and gymnastics clubs), and community sports clubs (youth sports associations, sports classes, etc.).

The enrollment rate for children between the ages of 4 and 9 was 52.7%, as indicated in Figure 6-4. Regarding gender, 58.2% of boys were enrolled compared to 46.9% of girls, a difference of 11.3 percentage points. Although this gender disparity in enrollment rates was nonexistent among preschoolers, it was significant for elementary school students. Enrollment rate increased along with grade level ― 32.8% for preschoolers, 55.3% for first- and second-graders, and 63.6% for third- and fourth-graders. Over half of elementary school students were enrolled in sports clubs.

By type of sports club, "private sports clubs (such as swimming and gymnastics clubs)" showed highest proportion with 71.9%, followed by community sports clubs (junior sports clubs, sports classes, etc.) with 29.6% and school sports clubs with 17.0%. The data suggests that private sports clubs are an important activity location for children in this age group.

2. Sports Club Membership for Young People Aged 10-19 Years

According to "The 2015 SSF National Sports-Life Survey of Young People", 57.3% of young people aged 10-19 years were members of sports clubs (in school sports clubs, community sports clubs such as junior sports clubs, and private sports clubs such as swimming and gymnastics clubs) in 2015 (Figure 6-5). When calculated with the total population of young people in Japan (11,847,792 people, according to the basic resident register as of January 1, 2015), the number of young people who were sports club members were around 679 million people.

By gender, boys accounted for 66.9% of sports club members, while girls accounted for 47.4%. By school year, the highest membership rate (72.0%) was found in elementary school years. The membership rate continued to be around 70% in elementary and junior high school years, but decreased to around 50% in high school years, and then 30% in college years. It can be concluded that high school years are a turning point for young people in terms of joining sports clubs. Moreover, the membership rate in young workers (aged 15-19 years) was significantly low, at 16.9%.

By type of sports clubs, "sports clubs at schools" ranked the highest

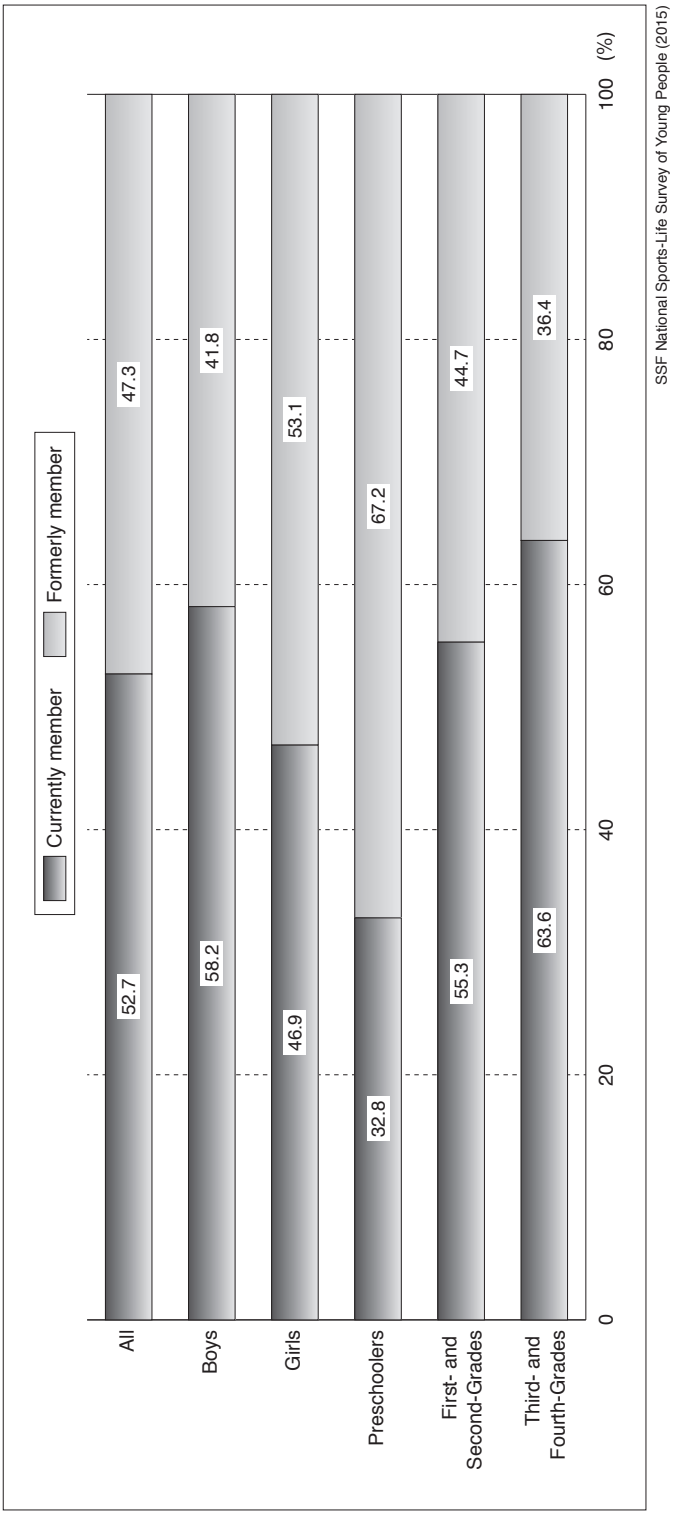


Figure 6-4 Enrollment in Sports Clubs among Children Aged 4-9 years (2015)

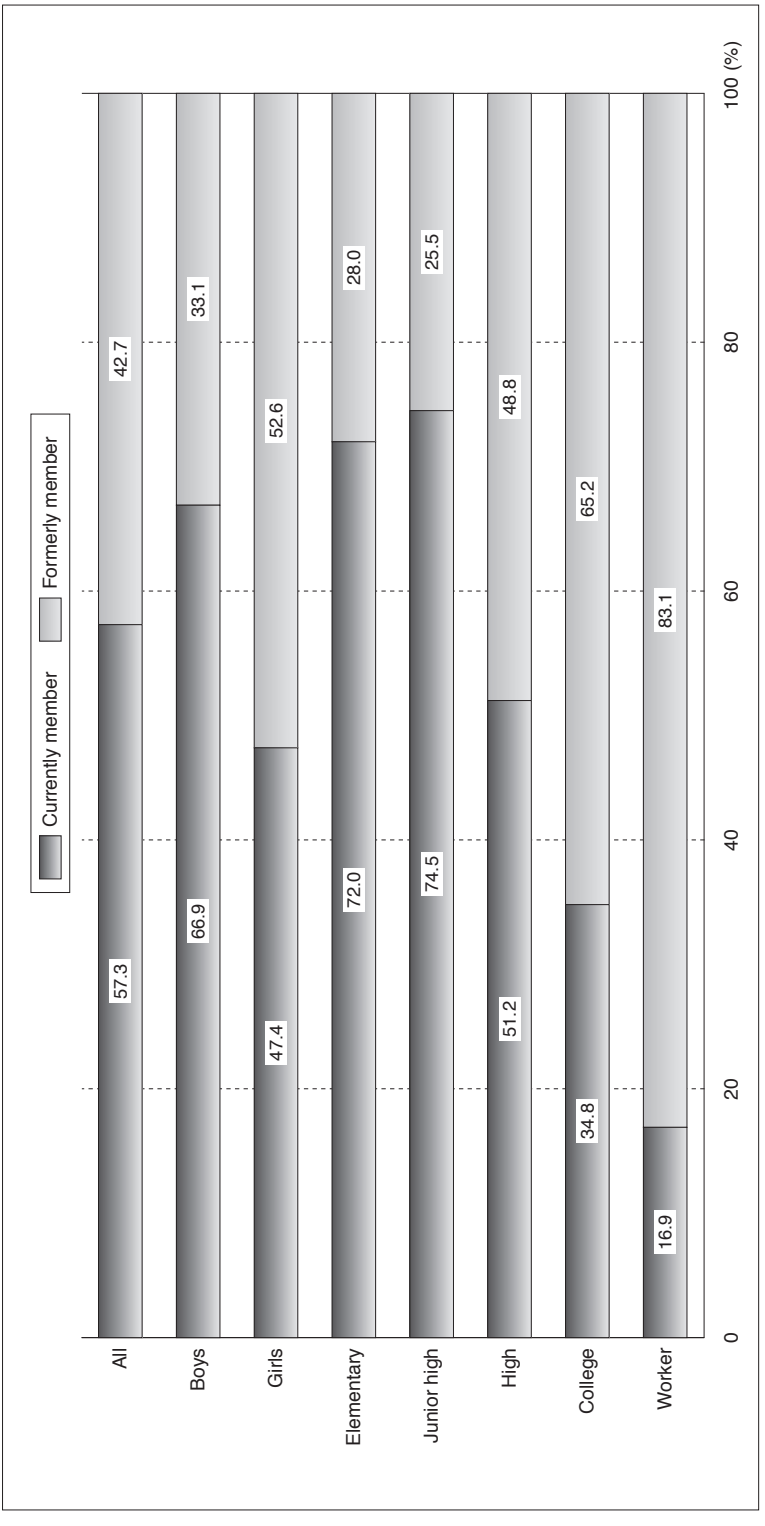


Figure 6-5 Membership in Sports Clubs of Young People Aged 10-19 (2015)

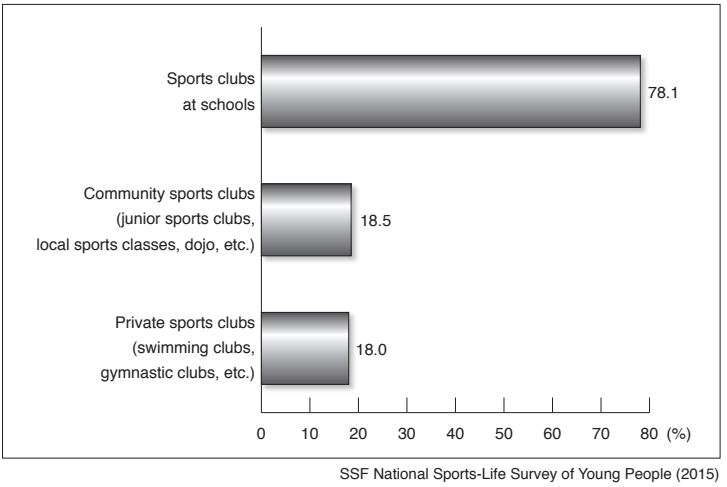
at 78.1%, followed by "community sports clubs (junior sports clubs, local sports classes, dojo, etc.)" at 18.5% and "private sports clubs (swimming clubs, gymnastic clubs, etc.)" at 18.0% (Figure 6-6).

3. School Sports Clubs in Junior High School

When focused on the changes in the total number of junior high school students and their membership rate in school sports clubs, the total number of students has decreased slightly in the past five years. However, the membership rate in school sports clubs has remained at around 65 to 67%.

By gender, the proportion of boys involved in school sports clubs has hovered at around 77%, while for girls it has remained at around 55%.

When the number of students registered in 2016 were examined by sports, "football" had the largest number with 227,735 students (a registration rate of 17.3%), followed by "rubber baseball" with 185,314 students (14.1%), "basketball" with 175,987 students (13.4%), "soft tennis" with 171,397 students (13.0%) and "table tennis" with 148,160 students (11.3%) (Table 6-1). In 2011, rubber baseball was the sport that had the largest number of students registered (19.6%). However, this number decreased to 14.1% in 2016 (a decrease of 5.5 percentage points over five years). On the other hand, "football" has shown an increasing popularity in the last five years. For girls, "soft tennis" was the sport that had the largest number registered with 186,931 students (a registration rate of 20.4%), followed by "volleyball" with 158,073 students (17.2%), "basketball" with 135,500 students (14.8%), "table tennis" and "track and field".



SSF National Sports-Life Survey of Young People (2015)

Figure 6-6 Types of Sports Clubs for Young People Aged 10-19 years (Multiple Answers)

Table 6-1 Number of Students Registered in Junior High School Sports Clubs (Top 10)

Rank	Boys	2016		2011	
	Sports	Number of students	(%)	Number of students	(%)
1	Football	227,735	17.3	237,783	16.6
2	Rubber Baseball	185,314	14.1	280,917	19.6
3	Basketball	175,987	13.4	178,468	12.5
4	Soft Tennis	171,397	13.0	166,815	11.7
5	Table Tennis	148,160	11.3	142,990	10.0
6	Track and Field	126,111	9.6	127,248	8.9
7	Volleyball	56,782	4.3	50,299	3.5
8	Kendo	54,177	4.1	61,113	4.3
9	Badminton	46,671	3.6	35,969	2.5
10	Swimming	31,923	2.4	30,276	2.1

Rank	Girls	2016		2011	
	Sports	Number of students	(%)	Number of students	(%)
1	Soft Tennis	186,931	20.4	196,129	20.0
2	Volleyball	158,073	17.2	161,691	16.5
3	Basketball	135,500	14.8	146,601	15.0
4	Table Tennis	95,219	10.4	90,578	9.3
	Track and Field	95,062	10.4	91,168	9.3
6	Badminton	87,100	9.5	88,971	9.1
7	Softball	41,847	4.6	53,821	5.5
8	Kendo	34,692	3.8	36,974	3.8
9	Swimming	16,782	1.8	17,438	1.8
10	Handball	11,336	1.2	11,408	1.2

Note：The Ranking are the results from 2016 survey.

Nippon Junior High School Physical Culture Association (2011, 2016)

4. School Sports Clubs in High School

The changes in the numbers of high school students, students registered with the All Japan High School Athletic Federation (JHAF) and the Japan High School Baseball Federation (JHBF), as well as students enrolled in school sports clubs were analyzed. The results show that the total number of students has decreased by about 6.7% in the last ten years. On the other hand, the enrollment rate in school sports clubs has increased by 4.1 percentage points, from 40.1% in 2006 to 44.2% in 2016.

Table 6-2 shows the number of students registered with JHAF in 2011 and 2016 by sports. In 2016, "football" had the largest number with 169,855 registered students (accounting for 20.9% of the total). This was followed by sports such as "basketball" with 95,681 students (11.8%), "track and field" with 70,276 students (8.6%), "tennis" and "badminton". For girls, "basketball" had the largest number with 61,175 registered students (13.5%), followed by "volleyball" with 60,941 students (13.5%), "badminton" with 56,369 students (12.5%), "track and field" and "tennis."

Table 6-2 Number of Students Registered in High School Sports Clubs (Top 10)

Rank	Boys	2016		2011	
	Sports	Number of students	(%)	Number of students	(%)
1	Football	169,855	20.9	150,655	19.8
2	Basketball	95,681	11.8	89,510	11.8
3	Track and Field	70,276	8.6	65,646	8.6
4	Tennis	68,752	8.5	64,076	8.4
5	Badminton	57,830	7.1	49,533	6.5
6	Table Tennis	50,147	6.2	50,907	6.7
7	Soft Tennis	48,669	6.0	46,299	6.1
8	Volleyball	45,211	5.6	35,721	4.7
9	Kyudo (Japanese archery)	34,254	4.2	33,610	4.4
10	Kendo	29,273	3.6	29,052	3.8

Rank	Girls	2016		2011	
	Sports	Number of students	(%)	Number of students	(%)
1	Basketball	61,175	13.5	62,225	14.3
2	Volleyball	60,941	13.5	59,151	13.6
3	Badminton	56,369	12.5	53,497	12.3
4	Track and Field	39,613	8.8	36,403	8.4
5	Tennis	38,588	8.5	35,736	8.2
6	Soft Tennis	36,062	8.0	35,532	8.2
7	Kyudo (Japanese archery)	32,658	7.2	31,254	7.2
8	Softball	22,047	4.9	24,853	5.7
9	Table Tennis	20,872	4.6	18,609	4.3
10	Kendo	16,428	3.6	14,664	3.4

Note：The Ranking are the results from 2016 survey.

All Japan High School Athletic Federation (2011, 2016)

III. Private Fitness Clubs

1. Trends in Private Fitness Clubs

Market Size

As of the end of December 2015, the market size (in sales) of private fitness clubs was 438.1 billion yen (a 1.5% increase from the previous year) (Table 6-3). Until 2009, the market for private fitness clubs remained low as if synchronized with the slow economy. The market slowly began to rise after 2010, with the efforts in the launch of a re-marketing strategy (that involved the opening of swimming schools in existing fitness clubs, for example) and the rise of private fitness clubs in lower-revenue and smaller-market franchises. Despite these efforts, the market was unable to maintain its upward movement immediately following the Great East Japan Earthquake on March 11, 2011. However, the impact didn't last long, and starting in July 2011 more fitness clubs began to recover from the recession. The market has continued to make turnarounds since 2012.

Number of Fitness Clubs

The number of newly opened private fitness clubs has remained at around 200 sites every year since 2011 and reached 300 sites for the first time in 2015. These clubs were significantly dominated by the small-scale gyms. In 2011, 159 small-scale gyms were opened, followed by 21 studio/single item facilities and 12 general fitness clubs. In 2015, 130 small-scale gyms were opened, 161 studio/single item facilities and 9 general fitness clubs. The reasons behind this trend could be that consumers have lost their interest in comprehensive fitness facilities, which are now viewed as old-fashioned. Instead, they have become more interested in finding facilities that focus specifically on the activities they are looking for.

The number of facilities closing down has also leveled out, at around

Table 6-3 Market Trend of Private Fitness Club Industry

	2011	2012	2013	2014	2015
Sales (in millions of yen)	4,095	4,124	4,240	4,316	4,381
Growth rate* (%)	▲1.1	0.7	2.8	1.8	1.5

* Changes in sales compared to the previous year. The growth rate in 2011 is based on the sales reached in 2010 (414 billion yen).
Note 1：Estimated by the editorial departments of "Fitness Business" and from the METI "Current Survey on Selected Service Industries"
Note 2：The above sales do not include facilities with only swimming pools (about 60 million yen) but do include sales from swimming lessons (for adults and children) offered within sports clubs. The amount is very low, but sales from boxing gyms are also included.
Note 3："Other income" related to fitness club management is included.

Fitness Business (2016)

10 sites per year. As of the end of December 2015, the total number of fitness clubs operating throughout Japan was 4,661 (6.5% increase from the previous year) (Table 6-4). By location, Tokyo had the highest number of new fitness clubs (93 facilities), followed by Osaka (38 facilities) and Kanagawa (22 facilities). As these results show, more facilities are operated in areas such as Tokyo Metropolitan area and Kinki region, where the levels of income and the population densities are high.

Membership

The number of private fitness club members has increased in the last five years, it reached the highest ever 4.21 million in 2015 which accounts for 3.32% of the total population of Japan. (Table 6-5). Although the price of membership fee has exhibited a decreasing trend due to the launch of different types of clubs offering lower membership fees, it turned over in 2014 and even increasing in 2015.

On the other hand, the annual frequency of use per year becomes a challenge for fitness clubs as it has been stagnated for a while. The frequent usage per year had remained at over 76 times per year in 2012 and 2013, it started decreasing in 2014 and recorded 73.2 times per year in 2015. The rate of membership withdrawal has been decreasing every year.

Table 6-4 Number of Private Fitness Clubs Facilities

	2011	2012	2013	2014	2015
Number of facilities	3,745	3,945	4,163	4,375	4,661
Growth rate* (%)	4.8	5.3	5.5	5.1	6.5

* Changes in facilities compared to the previous year. The growth rate in 2011 is based on the number of facilities in 2010.

Fitness Business (2016)

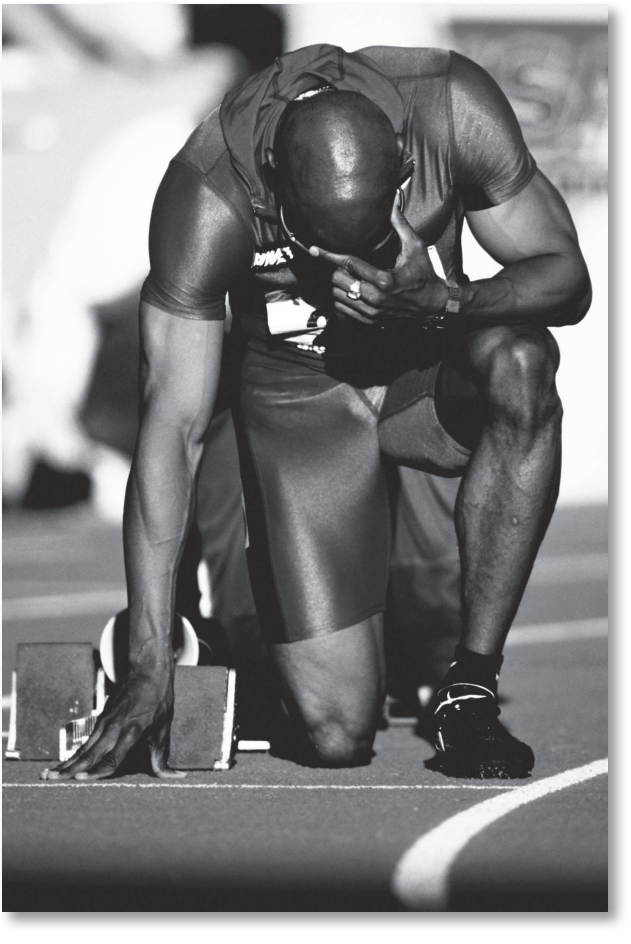
Table 6-5 Membership and Total Number of Use of Private Fitness Clubs (2016)

	2011	2012	2013	2014	2015
Membership	3,927,229	4,025,410	4,155,791	4,193,706	4,214,675
Membership penetration rate (%)	3.07	3.16	3.26	3.30	3.32
Total number of users (in ten thousand)	27,726	30,633	31,875	30,951	30,859
Number of users per facilities	74,035	77,434	76,567	70,745	66,207
Frequency of use per year	70.6	76.1	76.7	73.8	73.2

Fitness Business (2016)

Profitability

Although the profitability of most private fitness clubs dropped to its lowest level in 2010, the market has been in a slow recovery since 2011. Private fitness clubs have implemented strategies to improve their profitability, such as expanding swimming pools or dance classes, and reviewing their business expenses including rent, labor costs, advertisement and sales promotions. Other than these immediate efforts, they have not taken any dynamic measures to improve profitability that involved structural changes. Despite this, the presence of emerging venture capital companies with a clear business model (such as "Curves" and "Rizap") has become more prominent.



IV. Comprehensive Community Sports Clubs

1. Establishment and Development of Comprehensive Community Sports Clubs

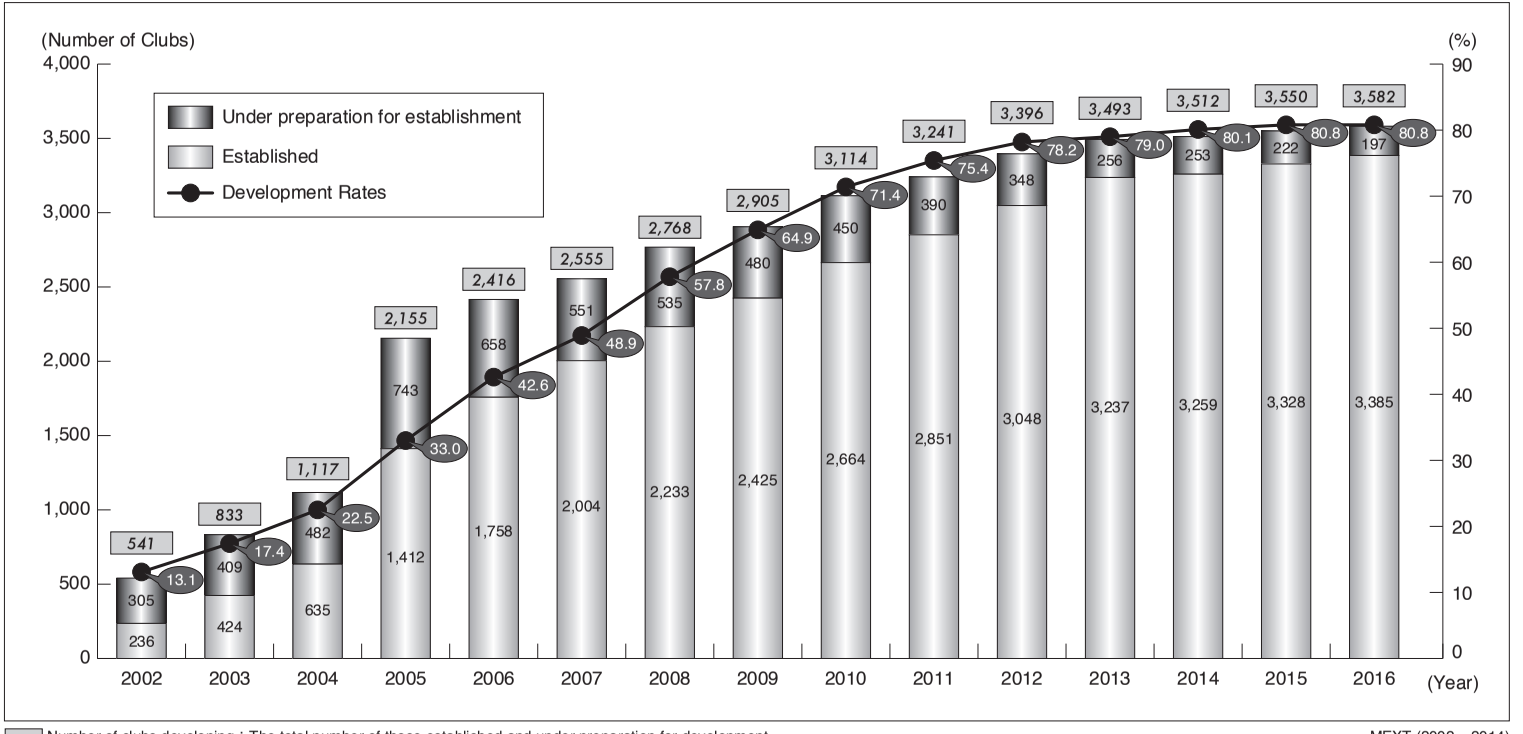
A comprehensive community sports club (hereinafter referred to as a "Comprehensive Club") is a sports club that is independently run by local residents, usually at a public facility or a school facility that is open to the public. A comprehensive club has the following features: (a) multi-category (multiple categories of sports are offered so that local residents can choose the activities they prefer); (b) multi-generation (all age groups can participate in a variety of sports); (c) multi-purpose (people can participate in an activity that is well-suited to their level of skills and purpose). Since 1995, MEXT has been promoting the development of comprehensive clubs.

According to the Japan Sports Agency's "Survey on the Development of Comprehensive Community Sports Clubs" (2016), the number of comprehensive clubs has increased by six times over the 10 years since the beginning of the survey in 2002 (Figure 6-7). The increase observed in 2005 was particularly significant, when the number of clubs almost doubled from 1,117 clubs in 2004, to 2,115 clubs in 2005. After 2006, the increase rate remained at around 3-8% when compared to the previous year. However, in 2013 the increase rate was even lower, growing by only 1% from the previous year. The total number of comprehensive clubs was 3,582, of which 3,385 clubs were already operational (including 72 clubs now currently inactive) and 197 clubs were in the process of establishment.

The Sport Basic Plan sets out policy goal that aim to continuously develop at least one comprehensive club in each municipality. Excluding the local communities with depopulation, 80% of the municipalities across the country now has established comprehensive clubs and it could be said that they were successful in achieving their goal.

2. Management of Comprehensive Community Sports Clubs

The management of comprehensive clubs, such as the number of members, the financial conditions, and the employment rate of club managers and staff members, can be assessed by "Survey on Comprehensive Community Sports Clubs", which has been conducted by MEXT since 2003 and transferred to JSA in 2015.



Number of clubs developing : The total number of those established and under preparation for development.
Development rate : The proportion of municipalities developing Comprehensive Clubs to the total municipalities.

MEXT (2002 – 2014)
Japan Sports Agency (2015 – 2016)

Figure 6-7 Changes in the Number of Comprehensive Community Sports Clubs and the Development Rate (Nationwide)

Number of Members

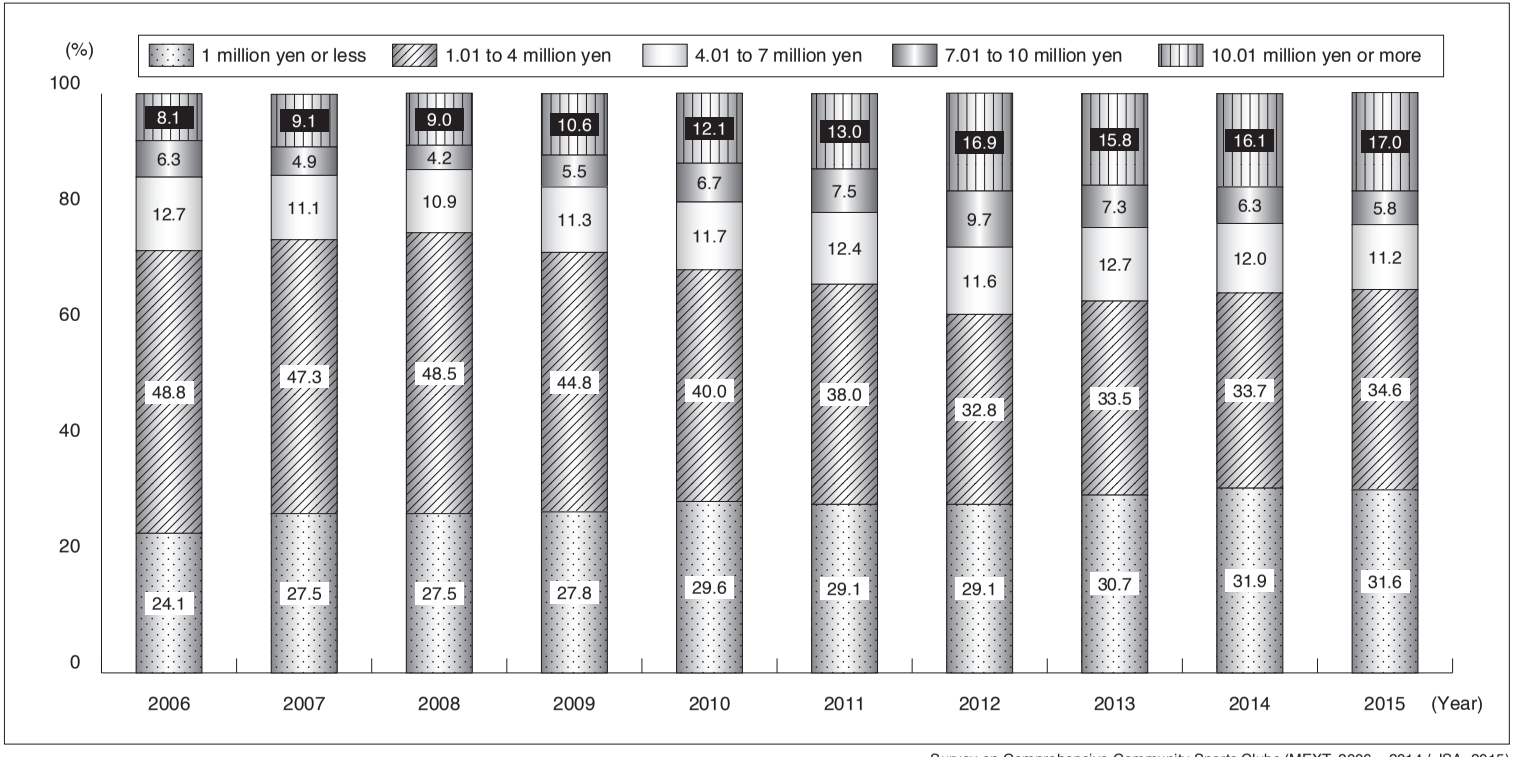
Looking at the number of the comprehensive club members and the changes observed over the years, the most prevalent size for a comprehensive club was 101 to 300 members, accounting for almost 40% of the total since 2005. Those with 300 or fewer members have shown a levelling off trend. Clubs with over 1,000 members accounted for less than 10% of the total.

Membership Fees

Over 90% of the comprehensive clubs collect membership fees. The most prevalent amount of monthly membership fee was 101 to 400 yen, observed in around 40% of clubs and decreased to 35.5% in 2015. When combined with those clubs collecting a monthly membership fee of 0 to 100 yen, the proportion of comprehensive clubs with membership fees of 400 yen or less accounted for around 60% of the total. The distribution of these fees has not changed much since 2003, except for those clubs collecting fees of 1,001 yen or more. The survey conducted in 2015 recorded the highest percentage in over 1,001 yen category with 22.6% since the beginning of the survey.

Budget Size and Internal Revenue Rate

Looking at the budget sizes of each comprehensive club, those that had a budget of 1.01 million to 4 million yen accounted for around 50% of the total since 2005. However, this group decreased to around 30% in 2011, and clubs with a budget of 10 million or more increased instead (Figure 6-8). Also, looking at the internal revenue rate (based on the ratio of membership fees, operating costs and consignment costs compared to revenue) less than half of the comprehensive clubs (43.5%) had a 50% or lower internal revenue rate in 2015, and in fact this trend has improved since 2013 (53.6%). In most cases, other income came from government subsidies or grants. To ensure their sustainable operation, it is necessary that comprehensive clubs become more independent in their club management without the government subsidies or grants.



Survey on Comprehensive Community Sports Clubs (MEXT, 2006 – 2014 / JSA, 2015)

Figure 6-8 Trends of the Budgets of Comprehensive Community Sports Clubs

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