



SPORT FOR
**every
one**



Sport White Paper
in
Japan
Digest
2014



S S F
SASAKAWA SPORTS FOUNDATION



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ARK Mori Bldg., 1-12-32 Akasaka, Minato-ku, Tokyo, 107-6011, Japan

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Contents

Chapter 1 Sports Policy

- I . The Acts on Sports 1
- II . Sports Administration System 5
- III . The Sport Basic Plan 11

Chapter 2 Sports Participation

- I . Participation in Sports and Physical Activities 15
- II . Sports Spectators 35
- III . Volunteering in Sports 41

Chapter 3 Financial Resources for Sports

- I . National and Local Government Budget for Sports 46
- II . Sports Promotion Lottery and Public Gambling 52
- III . Funds for Sports Organizations 60
- IV . National Budget for High Performance Sports 64

Chapter 4 Sports Facilities

- I . Current Status of Sports Facilities 69
- II . Sports Facilities for High Performance Sports 77
- III . Sports Facilities for People with Disabilities 84

Chapter 5 Human Resources for Sports

- I . Professions in Sports 87
- II . Sports Instructors 93

Chapter 6 Sports Clubs

- I . Sports Club Memberships for Adults 98
- II . Participation in Sports Clubs and School Sports Clubs
by Young People 102
- III . Private Fitness Clubs 107
- IV . Comprehensive Community Sports Clubs 110

List of Figures

List of Tables

Picture Credits

Foreword

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 through sports in order to promote the enjoyment of sports by "anyone, anytime, anywhere".

SSF first issued Sport White Paper in 1996 and it is currently revised every three years. This is the English edition of Sport White Paper and this issue covers the latest data about sports administration, participation, finance, facilities, human resources and sports clubs in Japan, which is picked up from the Japanese original edition.

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.

Kiyoko Ono
President, Sasakawa Sports Foundation
September, 2014

Sport White Paper Chief Editor

Kazutoshi Watanabe

Managing Director, Sasakawa Sports Foundation

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As of April, 2014

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

2 Sports Policy

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.
- Article 15 states that necessary measures contributing to the prompt and proper resolution of a dispute concerning sport should be taken, where such a dispute has arisen today. 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.
- 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.
- In September 2013, Tokyo was successful in its bid to host the Tokyo 2020 Olympic and Paralympic Games. Behind this success, Article 27 of the Act which sets the promotion of bidding for the hosting of international competitions as an important priority for the national government thought to have influenced its success in bidding with a strong government support.

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.

In FY2001, the amount of sales generated from the Sports Promotion Lottery was approximately 64.3 billion yen. However, in FY2006, the amount decreased to approximately 13.5 billion yen. As a result, the

lottery generated debts related to its management commission fee which significantly reduced sports subsidies derived from lottery revenues. The Japan Sport Council (JSC), which supervised the Sports Promotion Lottery, was tasked with developing a new type of lottery aimed at increasing sales revenue. The new lottery, “BIG”, was introduced in September 2006 and became popular with sales for FY2007 rapidly climbing to approximately 63.7 billion yen. Since then, sales have shown a stable growth, bringing in over 80 billion yen annually. Since FY2010, more than 10 billion yen has been made available for subsidized sports promotion projects.

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.

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 now called the “Act on the Japan Sport Council”.

The roles of JSC include the following: operation of the National Stadium and promotion of sports; research into sports science and medicine; operation of the Sports Promotion Lottery; strengthening of information strategies for sports in Japan; operation and management of the Prince Chichibu Memorial Sports Museum and Library; operation of mutual accident insurance and school safety support projects; operation and management of the Ajinomoto National Training Center; administration of

4 *Sports Policy*

subsidies for sports promotion projects; training of instructors and research related to mountaineering; and other commissioned projects.

In May 2013, a partial revision was made to the Act, which allowed lottery revenue to be allocated to expenses necessary for designated activities. These designated activities referred to the maintenance of particular sports facilities, which was conducted for the purpose of ensuring smooth bidding for the hosting of international sports competitions in Japan. The amount was specified by a consultation between the Minister of MEXT and the Minister of Finance (and was defined as within a range not exceeding five percent of the sales amount) for facilities requiring urgent maintenance. As a result, revenue from the Sports Promotion Lottery was made available for renovating the National Stadium, where the Rugby World Cup 2019 and the 2020 Olympic and Paralympic Games are scheduled to be held. Due to this revision, the following activities were added to the Act: protection of the rights and interests of sports players, activities regarding the maintenance and improvement of the physical and mental well-being, activities to ensure safety, activities regarding the promotion of the activity for preventing doping in sports, activities required for the fair and appropriate implementation of the activities regarding any other sports.



II. Sports Administration System

1. Sports Administrative Organizations

In Japan, pursuant to the Basic Act on Sport, a sports promotion system is led by administrative organizations such as MEXT and the Board of Education in each local government (Figure 1-1). These administrative organizations play a primary role in the creation of policies concerning school sports and physical education, and activities of school sports clubs as well as regional sports. They are also responsible for hosting and participating in international sports competitions such as the Olympic and Paralympic and the FIFA World Cup and enhancing high performance sports. On the other hand, corporate sports, as well as school sports, have long been supporting the promotion of sports in Japan, but there are no clear

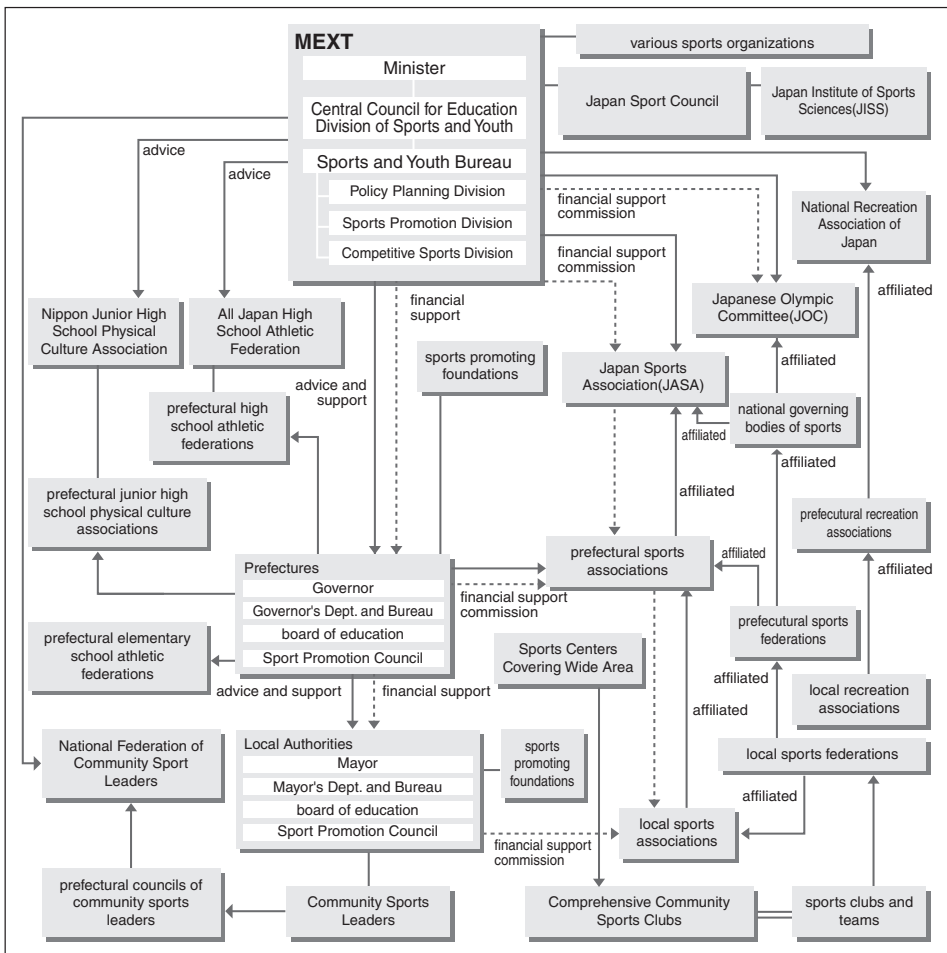


Figure 1-1 Sports Administration Structure in Japan

jurisdiction defined, and are currently in between the Ministry of Economy, Trade and Industry (METI) and MEXT.

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 tools, leisure industries such as ski resorts and bowling alleys, and health service industries such as fitness clubs are administered by 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; and sending athletes to international athletic events such as the Paralympics. The Ministry of Land, Infrastructure, Transport and Tourism (MLIT) is responsible for the maintenance of sports facilities such as athletic 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. For that reason, in order to establish a Sports Agency in near future, which is mentioned in the Supplementary Provision of the Basic Act on Sport, it is important to maintain consistency in policies and improve the efficiency of sports promotion projects.

In October 2013, the Abe Cabinet established the Tokyo 2020 Olympic and Paralympic Games Promotion Office within the Cabinet Secretariat, in preparation for the 2020 Olympic and Paralympic Games to be hosted in Tokyo. Civil servants of both MEXT and MHLW were simultaneously appointed as the members of the Promotion Office, and under the direction of the Minister in charge of the Tokyo Olympic and Paralympic Games, were assigned to coordinate between ministries concerning issues such as immigration control and the security of national facilities.

Sports Administration within MEXT

After the reorganization in 2001, the Ministry established the Sports

and Youth Bureau. Subsequently, the Policy Planning Division, the Sports Promotion Division, and the Competitive Sports Division were established in 2012. Each division has subsections devoted to specific interests, and the division of duties for each section is defined by the Ordinance of MEXT. The Sports Promotion Division has recently formed a new section aimed at improving sports environment for people with disabilities, within the scope of its authority and in cooperation with MHLW. Moreover, looking ahead to the consolidation of sports administrations in the future, from FY2014 the jurisdictions related to improving performance skills of and support to Paralympic athletes will be transferred from MHLW to MEXT.

2. Major Sports Promotion Institutions in Japan

In addition to administrative organizations, a number of public interest corporations such as JSC, the Japanese Olympic Committee (JOC), the Japan Sports Association (JASA) 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 students through the following activities; management of sports facilities such as the National Stadium, provision of aids and support required for the promotion of sports, payment of necessary benefits in the case of accidents that occur to students under the supervision of schools, and conduct of various research projects. The JOC, JASA 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 performance, the training of sports instructors, and the development of comprehensive regional sports clubs to enhance physical fitness of 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 2013, there are 28 prefectures where an educational administrative organization, such as the Board of Education, is in charge of sports administration, and 19 prefectures where the sports department is under the governors (i.e. in 40 percent of the prefectures, administrative affairs related to sports are the responsibility of the governor). Moreover, among the 20 ordinance-designated cities¹ in Japan, there are only three cities where the jurisdiction over the administrative affairs related to sports is in the hands of the Board of Education: Nagoya, Kobe and Sagamihara. With regard to the remaining 17 cities, a department or bureau under the mayor, such as the City Office (Yokohama City, etc.), the Citizen’s Affairs Department (Kitakyushu City), the Tourism & Cultural Affairs Bureau (Sapporo City) and the Economic Strategy Bureau (Osaka City), has the jurisdiction over the administrative affairs related to sports.

Meanwhile, according to a recent study conducted by MEXT, “Research and Study Concerning Local Sports Policies (2013)”, for other

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 April 2014, there are 20 ordinance-designated cities.

municipalities (except for ordinance-designated cities), more than 90% of the jurisdiction over the administrative affairs related to sports belongs to the Board of Education. This means that the proportion of Boards of Education responsible for sports administration becomes larger as the population size becomes smaller.

The transfer of these administrative affairs is often for the purpose of consolidation and to improve the efficiency of specific administrative affairs or projects related to sports. This was the case for Tokyo, and has also been the case where the comprehensive promotion of sports administration is aimed at by integrating with other administrative fields such as community development, environment, and tourism and culture. For example, Hokkaido Prefecture consolidated projects related to lifestyle culture and professional sports that were under the jurisdiction of the governor and those related to arts and amateur sports that were under the jurisdiction of the local Board of Education. Since April 2012, these projects are now placed under the Safe Living Environment Promotion Division of the Bureau of Lifestyle Improvement at the Department of Environment and Lifestyle of Hokkaido. Through this consolidation, Hokkaido hopes to develop its policies aimed at comprehensive and effective promotion of culture and sports. On the other hand, it is also essential that the department responsible for sports and other relevant organizations build a close cooperative relationship and understanding with local governments, and that certain duties are allocated between them, because of the various types of administrative affairs and projects related to sports that involve multiple organizations.

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 2013. Many corporations have merged with sports associations or been integrated with parks and greenery associations or cultural promotion foundations. For example, the Gunma Prefecture Sports Promotion Corporation established in 1977 made a new start as the Gunma Sports Association, after merging with the Gunma Amateur Sports Association in 2011. For another example, the Gifu Events and Sports Promotion Foundation, which was established through the integration of the Gifu Prefectural Agency for Sports Promotion and the Gifu Memorial Center was dissolved completely after the Gifu-Seiryu National Sports Festival held in 2012. Among the 20 ordinance-designated cities in Japan, seven of them currently have a quasi-government corporation or public foundation related to sports promotion. In particular, Sapporo City, where the administrative affairs related to sports were under the jurisdiction of the mayor even prior to the revised Local Educational Administration Act, has established the Sapporo Health & Sports Foundation through the integration of the Sapporo Sports Promotion Corporation and the Sapporo Health Promotion Center. Rather than limiting itself to the management of public facilities, the Sapporo Health & Sports Foundation delivers multiple independent business activities (concerning sports, physical exercise, public health, nutritional guidance and instructor development, recreation revitalization, etc.), and successfully coordinates both areas of sports promotion and health promotion.

III. The Sport Basic Plan

1. Highlights of the Sport Basic Plan

The “Sport Basic Plan” was announced on March 30, 2012 and embodies the principles of the provisions of Article 9 of the Basic Act on Sport, as well as indicates a concrete direction for Japan’s sports policies in the future. Within the Plan, key principles for the next ten years are specified. Also mentioned are comprehensive and systematic measures to be advanced over the next five years.

The Sport Basic Plan is comprised of four Chapters: Chapter 1 “The Role of Sport and a Vision of the Society to be Realized through Sport”; Chapter 2 “Key Principles of Sport Promotion for the Coming Decade”; Chapter 3 “Policies to be Taken comprehensively and systematically over the Next Five Years”; and Chapter 4 “Considerations for the Comprehensive and Systematic Promotion of These Policies.”

In Chapter 1, the society that the Plan aims to develop is defined through five detailed aspects: (a) A society in which the youth grow up soundly and value that include cooperation with other people, fairness and discipline; (b) A society that ensures a long life replete with health and vigor; (c) A vigorous and united society in which residents are deeply bound by active cooperation amongst themselves; (d) An economically developed and vigorous society where citizens are proud of their nation; (e) A nation which contributes to peace and goodwill, and is trusted and respected by the international community.

In Chapter 2, the Plan describes the top priority of the policy as “Creating sport environments enabling participation in sport by a wide range of people, in accordance with their specific interests and aptitudes, regardless of age, gender or disabilities”. The Chapter then sets out seven further policy goals as follows: (a) Increasing sport opportunities for children; (b) Promotion of sport activities in line with the life stages; (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.

In Chapter 3, the Plan proposes policies to be carried out comprehensively and systematically over the next five years. By establishing goals designated for different groups of people. For example, some of the

goals include making the level of children's physical fitness surpass the level found in 1985, and achieving a society in which two out of three adults (about 65%) engage in sport once or more a week, and one out of three adults (about 30%) engage in sport three or more times weekly. As for specific measures to improve community sports environments, the Plan suggests developing Comprehensive Community Sport Clubs and enriching sport instructors and facilities, to ensure that all residents can actively participate.

With regard to Japan's level of international competitiveness, the Plan suggests that Japan should aim to achieve fifth place or higher in the gold medal rankings at the Summer Olympics and tenth place or higher in that category at the Winter Olympics. This would surpass the existing records for medals won at the Summer Olympics and Winter Olympics, and also better the records for athletes placing eighth or higher in past Olympic Games and World Championships. With regard to the Paralympic Games, the Plan also suggests that Japan should aim to improve upon the gold medal rankings achieved at the most recent games—from 17th place at the 2008 Summer Paralympic in Beijing, and 8th place at the 2010 Winter Paralympic in Vancouver.

Moreover, the Plan recognizes the need for Japan to provide an environment suitable for the promotion of international exchanges and contributions through successfully bidding to host international competitions, as is seen in the case of the successful bid to host the 2020 Tokyo Olympic and Paralympic Games, as well as the Rugby World Cup 2019. In addition to the above, the Plan aims to improve transparency and fairness/equity in the sport world through the promotion of anti-doping and sports arbitration, and to advance coordination and cooperation between top level sports and amateur sports in local areas, creating a “virtuous cycle” in the sport world.

In Chapter 4, the Plan lists ways of developing a comprehensive and systematic promotion of these policies. This includes the facilitation of public understanding and participation, increased coordination and cooperation amongst those involved in sport, securing financial resources for sports promotion and utilizing resources efficiently, and assessment and revision of the Plan at regular intervals.

Since the formulation of the Plan in 2012, MEXT has incorporated a budget necessary for the realization of the policy goals set out in the Sport Basic Plan in its annual budget for sports policies, which has been reflected in subsidy programs sponsored by the Japan Sports Council and in grants from MEXT.

Column. International Development through Sports

In the preamble of the Basic Act on Sport, the expression “international development through sports” was included for the first time in the laws of Japan. Deputy Prime Minister Aso and Prime Minister Abe declared the “Sport for Tomorrow” program, during the International Olympic Committee (IOC) 2020 Candidate Cities Briefing on July 3, 2013 and at the Election of the Host City of the 2020 Olympic and Paralympic Games at the 125th IOC Session on September 7, 2013 respectively. This program is aimed at supporting the creation of sports culture in developing countries. The principles and content of the program received a high degree of attention from the IOC members, and led to Japan’s successful bid to host the 2020 Olympic and Paralympic Games.

Tokyo’s triumphant bid to host the 2020 Olympic and Paralympic Games is about to change the role of sports in Japan significantly. Domestically, the problem-solving model of sports has already been utilized to aid in the restoration and revitalization of local communities following the Great East Japan Earthquake. On the other hand, we can expect sports to play an important role in our international contribution to developing countries. Even on a global scale, international contribution to developing countries through sports is considered a progressive action, and is currently attracting much attention from people in both national and international sporting worlds.

From 1965, when the Japan International Cooperation Agency (JICA) sent their first Japan Overseas Cooperation Volunteers (JOCV) to four Southeast Asian countries, until the present, Japan has been involved in carrying out international cooperative activities through sports. As of July 31, 2013, a total of 2,954 physical education/sports volunteers (including 882 females) were involved in 30 different sports in overseas countries. The JICA has offered unique support, not only for the activities performed while dispatched, but also continuous support to many of those volunteers who have returned to Japan from service abroad.

In addition, JOC, JASA, the Japan Foundation, and other sports-related organizations, corporations, NPOs and local governments have contributed to projects independently or through collaborations. In line with the trends of the United Nations, IOC and other countries, a new concept known as “International Development through Sport: IDS” which is focused on contributing to the resolution of social issues and problems through sports development have become the vehicles for many private support organizations in implementing activities based on this concept.

Internationally, the “United Nations Office for Sports Development and Peace (UNOSDP)” has become the focus of much attention, as a new measure for accomplishing the Millennium Development Goals which were announced by the

United Nations at the beginning of the 21st century. In 2003, the United Nations General Assembly adopted a resolution proclaiming 2005 as the “International Year of Sport and Physical Education” and the supporting organization, UNOSDP, was established in the same year. In 2013, the United Nations General Assembly proclaimed an “International Day for Sports Development and Peace” to be celebrated each year on April 6th. Moreover, the scale of IDS activities has considerably expanded since 2000, and as of September 1, 2013, there were at least 504 organizations, 3,358 people and 192 projects registered on the “International Platform on Sport and Development” operated by the Swiss Academy for Development. In Europe, where community sports have always been popular, the “Sport For All” approach has progressed into the new “Development through Sport: DTS” campaign, which focuses on community development within a nation. DTS approaches are commonly used in local sport clubs, as well as in professional football clubs (or the like) in Europe and these experiences are then utilized in their international contribution activities.

Meanwhile, the number of main organizations practicing IDS approaches in Japan has been increasing since the late 1990s (mainly through NPOs), and their styles have also become more diverse. Since 2000, whether it be the CSRs adopted by private companies, or a former professional sports player establishing a public interest corporation, the range of such activities has been noticeably spreading.

The distinctive features of organizations engaged in IDS activities in Japan are that they are focused on: (1) securing funds through charities in Japan; and (2) supporting the same issues experienced both domestically and internationally. Even though most of their support goes to nearby countries in Southeast Asia, there are only a few organizations that have overseas offices, so that in most cases such organizations work in collaboration with local organizations to fully carry out their support activities.

In Japan, traditional styles of sports development are continuing (such as international cooperative activities through sports, and support through charities) while IDS approaches carried out progressively by private organizations are still in the development phase, and have not yet reached the level of Europe which incorporates problem-solving model of DTS. The “Sport for Tomorrow” program has been declared internationally, however, it is possible that serious issues may arise if Japan’s sports contributions do not match the needs of other countries. A system which contributes to the advancement of DTS approach in Japan must be established through developing research institutions and human resource organizations in a phased manner, re-examining the role of sports, and building an IDS infrastructure with an “All-Japan” system.

Chapter 2

Sports Participation

I. Participation in Sports and Physical Activities

1. Participation in Sports and Physical Activities by Adult

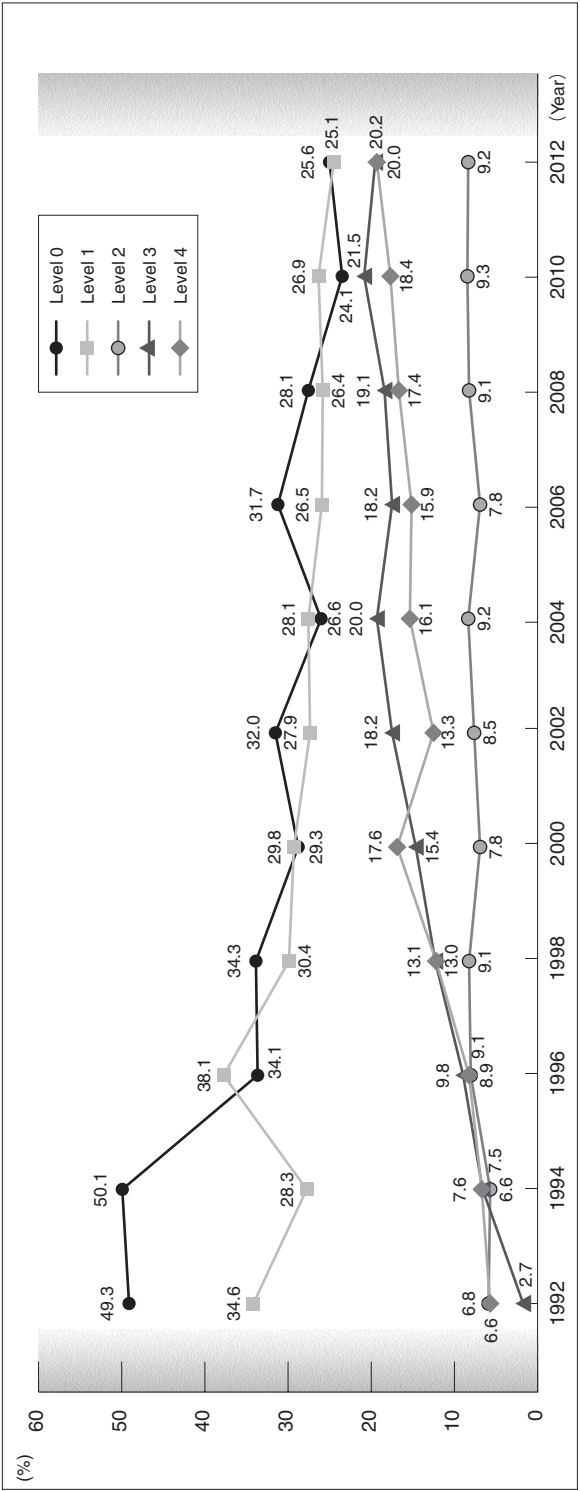
In order to understand the level of participation in sports and physical activities by adults, the Sasakawa Sports Foundation (SSF) has examined the statistical data gathered through the “SSF National Sports-Life Survey”, which has been conducted by SSF every other year since 1992. The survey aims to 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 of Health, Labor and Welfare (MHLW) in Japan. SSF defines people who

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 Participants)	At least twice a week, with a duration of more than 30 minutes, and with more than moderate intensity



SSF National Sports-Life Survey (2012)

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

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%, the highest level that had ever been measured. 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 40% 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 (2002 to 2012) were also 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). 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 2002, a 10 percentage point gap was found between women (36.9%) and men (26.9%), but in 2012 there was only a 5.5 percentage point gap found between women (28.3%) and men (22.8%), indicating that the gender difference was gradually narrowing.

In terms of age groups, the proportion of the population reaching Level 4 was higher in 2012 for all age groups, when compared to 2002 (Table 2-3). This was especially noticeable in the 60s age group, where the proportion almost doubled (from 13.8% in 2002 to 26.2% in 2012). 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 16 percentage point decrease (from 39.5% to 23.4%) for the 60s age group, and a 15 percentage point decrease (from 51.1% to 35.8%) for the over-70 age group.

Based on these results, it can be concluded that: (a) the proportion of people who regularly participate in sports and physical activities has

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

Level	Year	2002	2004	2006	2008	2010	2012
Men Level 0		26.9	23.2	27.4	24.4	21.0	22.8
Women Level 0		36.9	29.8	35.6	31.7	27.0	28.3
Men Level 1		34.1	33.9	31.0	31.5	32.7	30.0
Women Level 1		22.0	22.5	22.3	21.4	21.3	20.3
Men Level 4		13.9	17.0	17.2	18.5	20.4	20.4
Women Level 4		12.8	15.2	14.7	16.3	16.3	19.5

(%)

SSF National Sports-Life Survey (2002-2012)

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

Year	Age		In the 20s	In the 30s	In the 40s	In the 50s	In the 60s	70 and over	Total
	Level								
2002	Level 0		19.8	22.9	30.7	30.8	39.5	51.1	32.0
	Level 1		39.9	40.2	34.5	26.0	14.3	10.8	27.9
	Level 2		9.5	9.1	9.3	8.0	7.8	7.3	8.5
	Level 3		13.3	13.5	14.4	23.0	24.7	19.7	18.2
	Level 4		17.4	14.3	11.1	12.3	13.8	11.1	13.3
2012	Level 0		22.7	23.7	22.2	28.1	23.4	35.8	25.6
	Level 1		31.1	32.2	31.5	26.9	15.5	11.8	25.1
	Level 2		9.8	12.0	10.5	8.7	5.8	8.1	9.2
	Level 3		15.0	13.8	16.5	18.9	29.1	28.4	20.2
	Level 4		21.3	18.4	19.3	17.4	26.2	15.9	20.0

SSF National Sports-Life Survey (2002-2012)

(%)

exhibited an overall upward trend; (b) the gender difference in such participation has been narrowed; and in particular, (c) the proportion of the 60s age group who participates in sports and physical activities has increased significantly.

3. Participation in Sports and Physical Activities 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). “Strolling”, “walking”, “calisthenics and light exercises” and “bowling” have ranked in the top four in the surveys conducted since 2002. Following these, “weight training”, “golf (on a course or on a driving range)” and “fishing” ranked in the top ten. Overall, physical activities designed for health improvement and sports that can be done individually tended to rank high.

Looking at the changes in the types of sports participated over the years, it was found that “swimming” and “sea bathing” no longer ranked within the top ten. Instead, the ranking of “jogging/running” was higher both in 2010 (8.5%) and in 2012 (9.7%), reflecting the impact of running boom in recent years.

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

According to the “Comprehensive Survey on Measures for People with Disabilities” conducted by the Cabinet Office (2008), 40.5% of people with disabilities participate in some form of sports or art activities. In terms of the type of disability, over 60% of the people surveyed had visual impairments while the remaining 30 to 40% were people with other disabilities (Figure 2-2). People aged 65 or over accounted for more than 50% of those who were surveyed, while those aged under 65 accounted for approximately 40%. The participation in sports activities included “table tennis” with 12.6%, “swimming” at 12.4% and “track and field” at 8.6%. When differences were looked at by age, 33.3% of those aged under 18 participated in swimming, showing a marked participation preference for swimming in the younger generation.

When asked about the future intention of those respondents who currently did not participate in any sports or art activities, 41.3% answered that they “would like to participate”. Most of those answered “would like to participate” had developmental disorders (around 70%) or visual impairments (around 60%). Sports that they would like to participate in were “swimming” at 22.5%, “table tennis” at 12.5% and “track and field” at 9.1%.

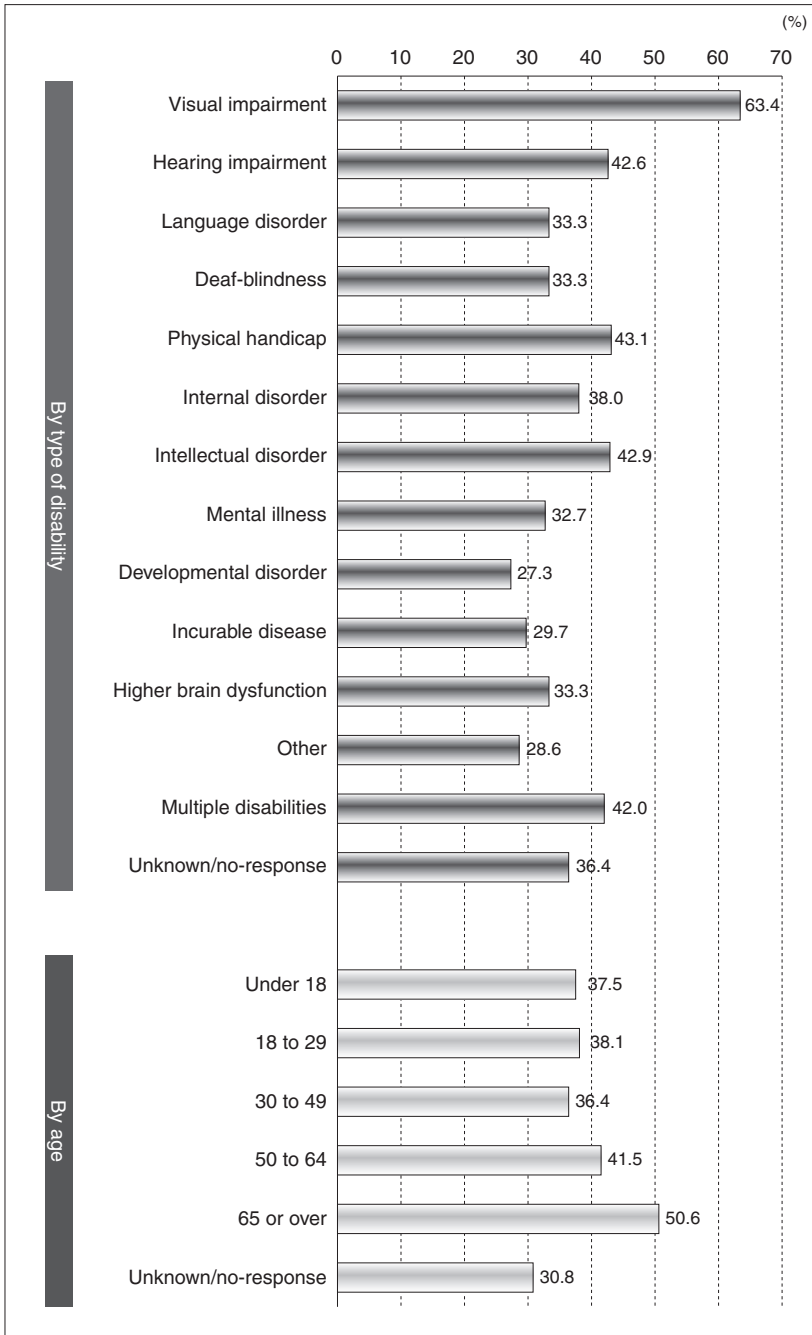
Table 2-4 Rates of Participation in Sports and Physical Activities over the years (By Types of Sports)

(%)

Year Rank	2002	2004	2006	2008	2010	2012
1	Strolling 31.1	Strolling 34.0	Strolling 29.2	Strolling 30.8	Strolling 34.8	Strolling 34.9
2	Walking 16.7	Walking 21.6	Walking 19.7	Walking 22.4	Walking 24.5	Walking 25.0
3	Calisthenics and light exercises 16.2	Calisthenics and light exercises 18.6	Calisthenics and light exercises 16.1	Calisthenics and light exercises 17.5	Calisthenics and light exercises 18.5	Calisthenics and light exercises 20.5
4	Bowling 14.7	Bowling 16.4	Bowling 14.8	Bowling 15.1	Bowling 13.3	Bowling 13.0
5	Swimming 9.2	Fishing 9.6	Weight training 8.4	Weight training 11.1	Weight training 11.5	Weight training 12.2
6	Fishing 8.6	Weight training 9.6	Golf on a course 8.1	Swimming 9.0	Golf on a course 9.0	Jogging/Running 9.7
7	Golf on a course 8.5	Sea bathing 9.5	Swimming 7.5	Sea bathing 8.9	Fishing 8.5	Golf on a course 8.3
8	Weight training 8.3	Swimming 9.3	Golf on a driving range 7.2	Golf on a course 8.7	Jogging/Running 8.5	Golf on a driving range 8.0
9	Sea bathing 8.3	Golf on a course 9.2	Sea bathing 6.9	Playing catch 8.0	Golf on a driving range 8.2	Playing catch 7.5
10	Golf on a driving range 8.0	Golf on a driving range 8.1	Fishing 6.8	Cycling 7.9	Playing catch 8.1	Fishing 7.5

Performed at least once in the previous year.

SSF National Sports-Life Survey (2002-2012)



"Comprehensive Survey on Measures for People with Disabilities" conducted by the Cabinet Office (2008).

Figure 2-2 Rates of Participation in Sports or Art Activities (By Type of Disability and By Age)

When asked the reasons why respondents did not or could not participate in sports or art activities even though they wanted to, the most prevalent reason was that “there are no sports or art activities offered in the community that I would like to participate in” at 28.3%, followed by “I am unable to participate because having have no time” at 27.4% and “having have received no information about available sports or art activities” at 23.3%. By age, “there are not enough instructors” was particularly high (35.3%) among those aged under 18 (accounting for 15.3% of the total).

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 2012 SSF National Sports-Life Survey” and “The 2013 SSF National Sports-Life Survey of Young People”, were described based on the data released by NGBs (Table 2-5).

When the number of individual players was examined, the sports that had the largest number of registered players was “football” with 927,671 people, followed by “basketball” (615,458 people), “soft tennis” (450,899 people), “volleyball” (375,253 people) and “track and field” (319,354 people). By gender, the number of men registered was higher than that of women in many sports, with the exception of “aerobics” and “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 “rugby” at 24.42%, followed by “judo”(24.33%), “gateball” (20.80%), “soft tennis” (20.5%), “track and field” (18.35%) and “ice hockey” (17.64%). 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 sports such as “mountaineering” (0.01%), “golf” (0.05%) and “aerobics” (0.09%).

24 Sports Participation

In order to understand the participation in sports or physical activities by children after school and during the holidays, and their sports environments, SSF has been conducting the “National Sports-Life Survey of Young People” since 2001, addressing sports participation of young people aged 10 to 19 years. Through these surveys, SSF has found a bipolarization in the participation rate of young people (from those who were very involved in sports, to those who were entirely inactive). In 2009, SSF began to conduct its “National Sports-Life Survey of Children”, which targeted children from preschool to third and fourth grades, with the presupposition that the bipolarization would also be present in sports participation of children under 9 years of age. Conducting these two surveys during the

Table 2-5 Number of Registered Players and Estimated Participants

Sports	Number of registered teams			Participation rate(%)		Estimated number of participants (in 10,000s)	Percentage of the population (registered players)
	Total	Men	Women	Teenager	Adult		
Bowling	25,000	20,000	5,000	16.5	13.0	1,549	0.16
Swimming	118,714	-	-	25.3	7.1	1,040	1.14
Football	927,671	888,783	38,888	31.1	5.6	953	9.73
Golf	4,775	3,483	1,292	2.4	8.3	892	0.05
Badminton	245,612	-	-	22.3	5.0	786	3.12
Table tennis	304,620	189,223	115,397	18.5	4.7	710	4.29
Baseball	[65,803]	-	-	18.7	4.6	701	-
Volleyball	375,253	120,217	255,036	16.5	4.0	613	6.12
Mountaineering	645	383	262	5.1	4.7	550	0.01
Basketball	615,458	338,628	276,830	25.9	2.0	517	11.90
Softball	[10,679]	[6,040]	[4,639]	7.3	3.6	461	-
Futsal	124,436	112,469	11,967	6.7	2.9	382	3.26
Ground golf	190,434	115,303	75,131	0.0	3.5	364	5.23
Soft volleyball	18,314	-	-	4.2	2.5	310	0.59
Aerobics	2,420	383	2,037	0.6	2.4	257	0.09
Ice skating	9,360	-	-	4.8	1.6	223	0.42
Tug of war	1,933	1,496	437	3.7	1.7	221	0.09
Soft tennis	450,899	227,568	223,331	9.7	1.0	220	20.50
Track and field	319,354	212,672	106,682	11.1	0.4	174	18.35
Discus	3,193	2,134	1,059	4.7	0.5	108	0.30
Gateball	162,238	-	-	0.4	0.7	78	20.80
Karate	80,652	-	-	3.2	0.3	69	11.69
Judo	146,001	116,776	29,225	2.4	0.3	60	24.33
Canoe	5,071	3,311	1,760	1.3	0.4	57	0.89
Rugby	109,887	104,235	5,652	1.2	0.3	45	24.42
Curling	2,541	1,891	650	0.0	0.2	21	1.21
Ice hockey	19,401	17,835	1,566	0.1	0.1	11	17.64
Squash	2,084	-	-	0.1	0.1	11	1.89

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 2012 survey by the adult population (of 103,973,831 people based on the Basic Resident Register on March 31, 2011). However, for the 22 municipalities that were not able to provide their population status due to the 2011 Great East Japan Earthquake, the number of people registered in the Basic Resident Register on March 31, 2010 was used. 2 The number of participants is calculated by multiplying the participation rate suggested in the 2013 survey by the teenage population (of 11,920,393 people based on the Basic Resident Register on March 31, 2012).

Note3 : Soft volleyball is not included in the volleyball.

Note4 : Futsal is not included in the football.

same time period allowed SSF to capture a more comprehensive picture of children's participation in sports and physical activities. Both surveys have been performed every two years. The fifth edition of the "National Sports-Life Survey of Young People" and the third edition of the "National Sports-Life Survey of Children" were both conducted in 2013.

6. 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 2-6). 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 1.8%; those who participated at least three times a week (moderate and high frequency groups) was about 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).

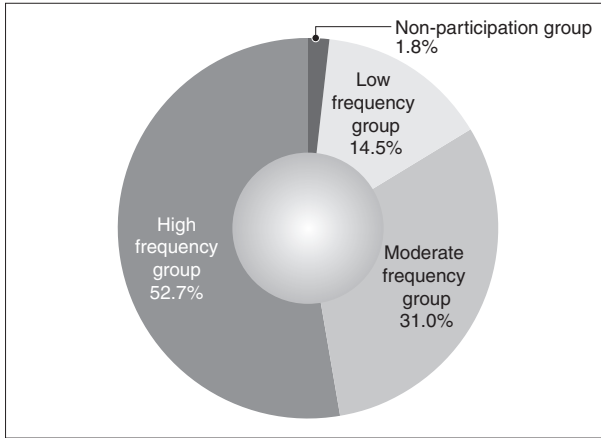
In Figure 2-4, the frequency levels of children's participation in sports are displayed by gender and by school year. In the high frequency group, the girls led the boys by 5 percentage points. However, in the moderate

Table 2-6 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)

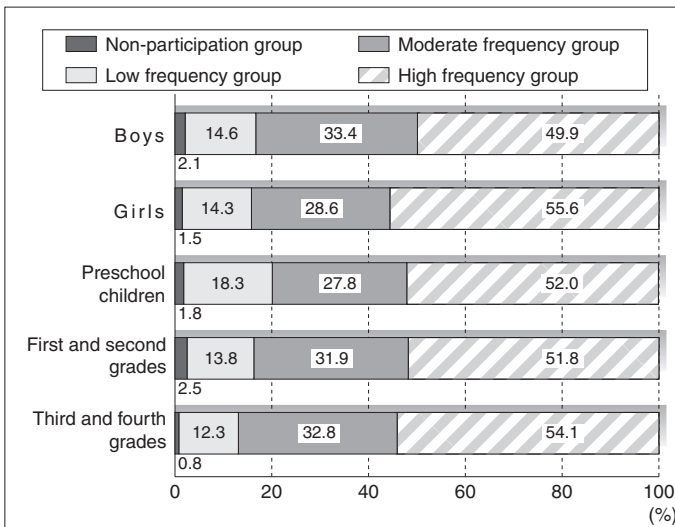
frequency group, the boys were slightly ahead of the girls. When these two groups were combined, the total percentage was 83.3% for boys and 84.2% for girls, suggesting that there was no significant gender difference in the frequency of sports participation.

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



SSF National Sports-Life Survey of Children (2013)

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



SSF National Sports-Life Survey of Children (2013)

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

as the school years advanced, with 18.3% for preschool children, 13.8% for first and second grades, and 12.3% 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 79.8% for preschool children, 83.7% for first and second grades, and 86.9% for third and fourth grades.

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

Table 2-7 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 2013 was “playing tag”, followed by “riding bicycle”, “swinging”, “swimming” and “hide-and-seek”.

Table 2-8 shows the ranking 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 “swimming”, “riding bicycle”, “swinging” and “football”.

Table 2-7 Ranking of Participation in Sports and Physical Activities by Children Aged 4-9 years (At Least Once a Year)

Rank	Sports	%
1	Playing tag	67.8
2	Riding bicycle	55.0
3	Swinging	54.7
4	Swimming	51.0
5	Hide-and-seek	49.9
6	Skipping rope (including long rope)	48.5
7	Horizontal bar	46.6
8	Running	41.4
9	Dodgeball	39.7
10	Football	38.1

Table 2-8 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	49.9	1	Football	48.5	1	Playing tag	51.5
2	Swimming	37.7	2	Playing tag	48.4	2	Riding bicycle	37.3
3	Riding bicycle	35.6	3	Swimming	41.0	3	Swinging	36.4
4	Swinging	29.8	4	Riding bicycle	33.9	4	Skipping rope (including long rope)	36.3
5	Football	28.8	5	Dodgeball	31.6	5	Swimming	34.2
6	Dodgeball	26.7	6	Swinging	23.4	6	Horizontal bar	30.2
7	Skipping rope (including long rope)	26.1	7	Runnig	18.7	7	Hide-and-seek	25.6
8	Horizontal bar	21.7	8	Hide-and-seek	16.9	8	Dodgeball	21.4
9	Hide-and-seek	21.1	9	Skipping rope (including long rope)	16.4	9	Runnig	18.8
10	Runnig	18.8	10	Horizontal bar	13.6	10	Riding unicycle	18.1

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 (2013)

By gender, the most popular sports for boys were “football”, “playing tag”, “swimming”, “riding bicycle” and “dodgeball”, and those for girls were “playing tag”, “riding bicycle”, “swinging”, “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.”

8. 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 2-9).

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 2013, the percentage of young people who did not participate in any sports or physical activities in the previous year (Level 0) was 13.0%, representing one in every eight young people (Figure 2-5). Those who participated at least five times a week, with a

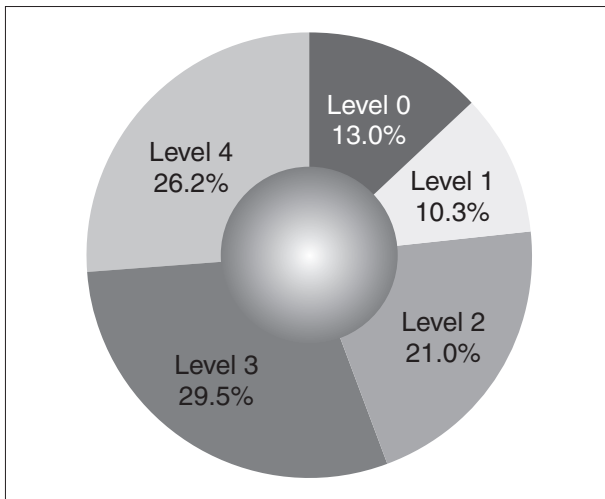
Table 2-9 Levels of Participation in Sports and Physical Activities by Young People Aged 10-19 years

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

duration of 120 minutes, and with more than moderate intensity (Level 4) constituted 26.2% of the young people.

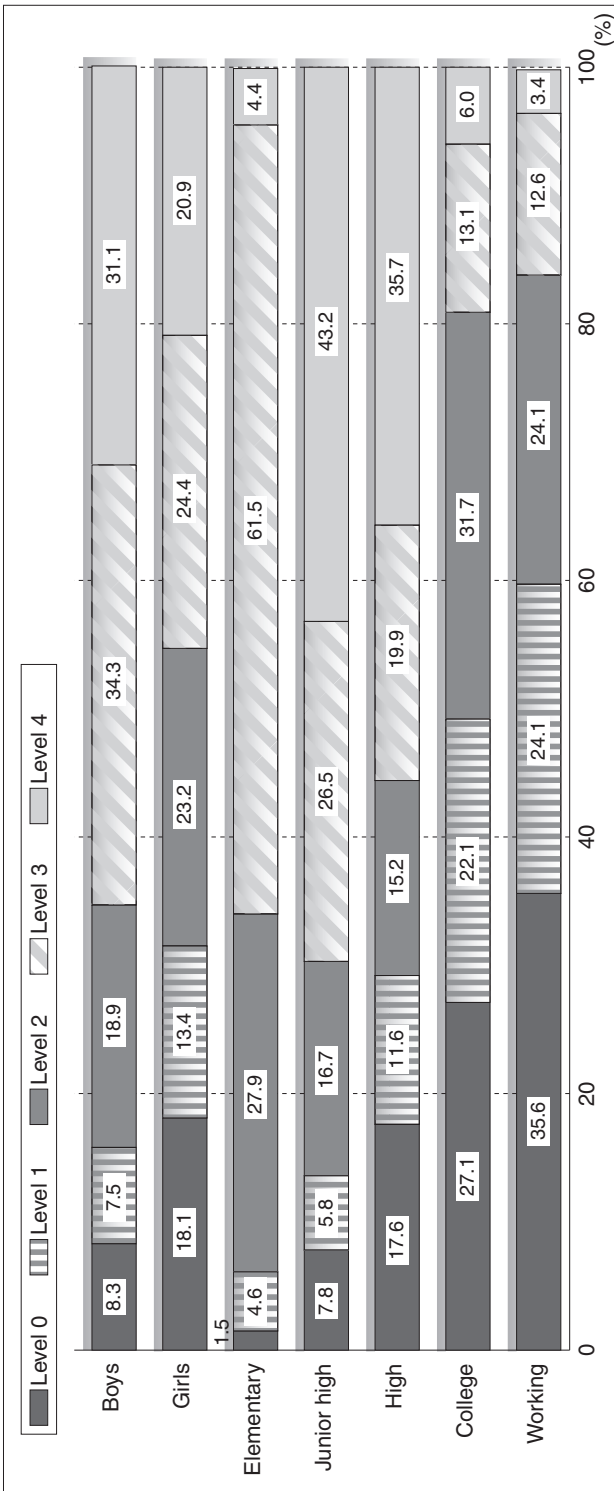
By gender, it was found that the proportion of boys at Level 1 was 8.3% while that of girls was 18.1%. Meanwhile, the proportion of boys at Level 4 was 31.1%, and that of girls was 20.9%. Both of these results show that the frequency of participation in sports and physical activities is higher for boys than girls (Figure 2-6). It was also found that one in every five girls did not participate in any sports or physical activities at all during the previous year.

By school year, the proportion of young people at Level 0 was 1.5% in elementary school years, 7.8% in junior high school years, 17.6% in high school years and 27.1% 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 43.2% and 35.7%, 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 35.6%, and those at Level 4 were only 3.4%. Those who participated in physical activities once a week or less (i.e. Level 1 or below) accounted for almost 60% (59.7%) of young workers. Such a low participation rate compared to other youths is an issue that needs to be addressed appropriately.



SSF National Sports-Life Survey of Children (2013)

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



SSF National Sports-Life Survey of Children (2013)

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

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

Table 2-10 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 2013, “football” had the highest participation rate, followed by “playing tag”, “jogging or running”, “basketball”, and “swimming”.

Table 2-11 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 2013, “football” had the highest participation rate, followed by “basketball”, “playing tag”, “jogging or running”, “dodgeball” and “swimming”. For the level of “at least once a year”, “baseball” and “volleyball” ranked fairly low, 12th and 16th 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” and “baseball” had high participation rates among boys, on the other hand “badminton” and “volleyball” had high participation 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.

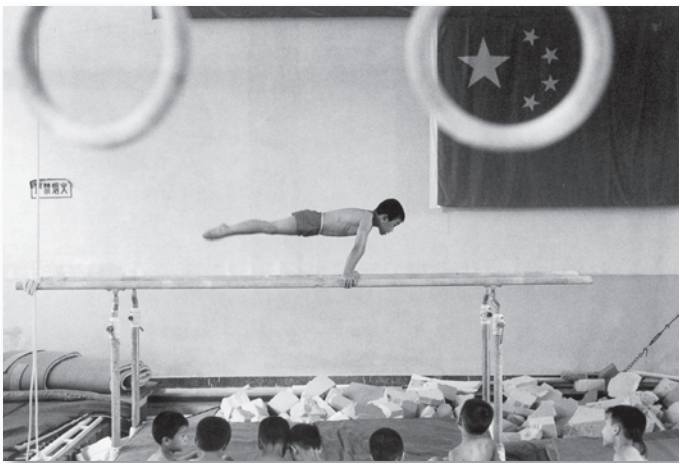


Table 2-10 Ranking of Participation in Sports and Physical Activities by Young People Aged 10-19 years (At Least Once a Year)

Rank	2009			2011			2013		
	Sports	%	Rank	Sports	%	Rank	Sports	%	Rank
1	Football	26.4	1	Football	26.9	1	Football	31.1	
2	Basketball	26.3	2	Basketball	23.8	2	Playing tag	30.0	
3	Jogging/running	23.4	3	Jogging/running	23.5	3	Jogging/running	26.4	
4	Badminton	22.8	4	Playing tag	22.8	4	Basketball	25.9	
5	Skipping rope	22.6	5	Swimming	22.7	5	Swimming	25.3	
6	Baseball	22.3	6	Badminton	19.2	6	Dodgeball	24.0	
	Dodgeball	22.3	7	Skipping rope	19.1	7	Skipping rope	23.1	
8	Playing catch	21.5	8	Weight training	18.9	8	Badminton	22.3	
9	Swimming	21.0	9	Dodgeball	18.8	9	Weight training	20.7	
10	Weight training	20.5	10	Baseball	17.5	10	Swinging	20.2	

SSF National Sports-Life Survey of Young People (2010, 2012, 2013)

Table 2-11 Ranking of Participation in Sports and Physical Activities by Young People Aged 10-19 years (Often Participated in)

		2009			2011			2013		
Rank	Sports	%	Rank	Sports	%	Rank	Sports	%		
1	Football	24.4	1	Football	23.7	1	Football	28.2		
2	Basketball	22.5	2	Basketball	21.2	2	Basketball	21.5		
3	Baseball	21.1	3	Jogging/running	17.0	3	Playing tag	21.3		
4	Badminton	18.4	4	Swimming	16.1	4	Jogging/running	19.3		
5	Jogging/running	16.7	5	Baseball	15.3	5	Dodgeball	17.1		
6	Weight training	15.6	6	Badminton	13.7		Swimming	17.1		
7	Dodgeball	15.1	7	Weight training	13.4	7	Badminton	16.7		
8	Volleyball	15.0	8	Playing tag	13.2	8	Weight training	15.1		
9	Swimming	14.7	9	Volleyball	11.2	9	Baseball	15.0		
10	Playing catch	13.6	10	Dodgeball	10.4	10	Volleyball	12.4		

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 (2010, 2012, 2013)

II. Sports Spectators

1. Sports Spectating at Live Sports Events

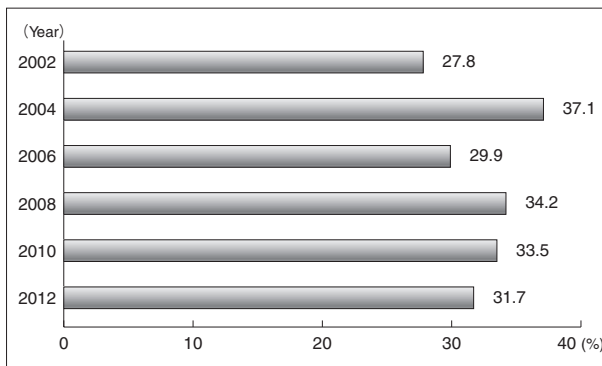
According to “The 2012 SSF National Sports-Life Survey”, 31.7% of adults had attended a sporting event at gymnasiums/arenas or stadium as a spectator in the previous year (Figure 2-7). When compared with previous surveys, the rate of sports spectating has stayed within the range of 30 to 40 percent in the last 10 years.

By gender, the spectating rate for men (36.9%) was 10.3 percentage points higher than the rate for women (26.6%) (Figure 2-8). By age, the highest spectating rate was found in the 40s age group (43.2%), followed by the 30s and 20s 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 15.8%, followed by “high-school baseball” at 6.4%, “J. League football (J1 and J2) - professional football league” at 5.2% and “marathon and Ekiden - marathon relays” at 4.7% (Table 2-12).

2. Sports Viewing on TV

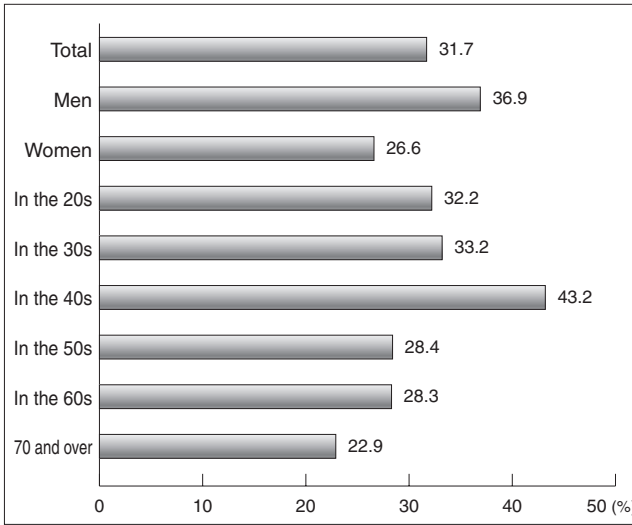
In Table 2-13 and 2-14, the rates of sports viewing on TV, sports spectating, and sports participation in adults and youths are shown. The rate of viewing sports on TV among adults was estimated to be 93.5% (about 97.22 million people) and 87.9% among adolescents (about 10.48 million people). Regardless 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.



The survey conducted in 2002 did not include “public gambling”

SSF National Sports-Life Survey (2012)

Figure 2-7 Rates of Adults Spectating Live Sports Events



SSF National Sports-Life Survey (2012)

Figure 2-8 Rates of Adults Spectating Live Sports Events (By Gender and By Age)

Table 2-12 Popular Spectator Sports (Multiple Answers)

2012			
Rank	Sports	Attendance rate(%)	Estimated spectators (in 10,000s)
1	Professional baseball (NPB)	15.8	1,643
2	High-school baseball	6.4	665
3	J League football (J1,J2)	5.2	541
4	Marathon and Ekiden	4.7	489
5	Amateur baseball (University, company teams, etc.)	2.5	260
6	Football (High school, University, JFL, etc.)	2.4	250
7	Professional golf	2.1	218
8	Men's national football teams (including the Olympics)	1.4	146
9	Rugby	1.3	135
10	Basketball (High school, University, JBL, etc.) Volleyball (High school, University, V League, etc.)	1.2	125

SSF National Sports-Life Survey (2012)

Table 2-13 Rates of Sports Viewing and Sports Participation in Adults (2012)

	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	93.5	94.7	92.2	93.4	94.1	93.8	94.3	92.9	91.9
Rate of sports spectating	31.7	36.9	26.6	32.2	33.2	43.2	28.4	28.3	22.9
Rate of sports participation	74.4	77.2	71.7	77.3	76.3	77.8	71.9	76.6	64.2

Note : The proportion of those who watch or participate in sports at least once a year

SSF National Sports-Life Survey (2012)

Table 2-14 Rates of Sports Viewing and Sports Participation in Young People Aged 10-19 years (2013)

	Overall	Boys	Girls	Elementary	Junior high	High	College
Rate of sports viewing on TV	87.9	89.3	86.3	90.2	88.9	86.2	87.9
Rate of sports spectating	36.9	41.2	32.1	38.4	36.7	40.8	33.7
Rate of sports participation	87.0	91.7	81.9	98.5	92.2	82.4	72.9

Note : The proportion of those who watch or participate in sports at least once a year

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

When looking at the types of sports viewing on TV by adults (Table 2-15), the most viewed sports were “professional baseball (NPB)” at 61.5%, followed by “men’s national football teams (including the Olympics)”, “national volleyball teams”, “figure skating” and “women’s national football teams”. By gender, TV sports were viewed more by men than by women in most of the sports, except for “figure skating” and “national volleyball teams”, which showed higher rates of viewing among women.

Among young people, “men’s national football teams (including the Olympics)” was the most watched sports events at 60.6%, followed by “professional baseball (NPB)”, “women’s national football teams”, “figure skating” and “high school baseball” (Table 2-16). By gender, “men’s national football teams (including the Olympics)” topped the list for both men and women, but many of the sports viewed by people differed by gender. For example, the highly ranked sports for men were “professional baseball (NPB)” and “high school baseball”, while highly ranked by women were “figure skating” and “national volleyball teams”.

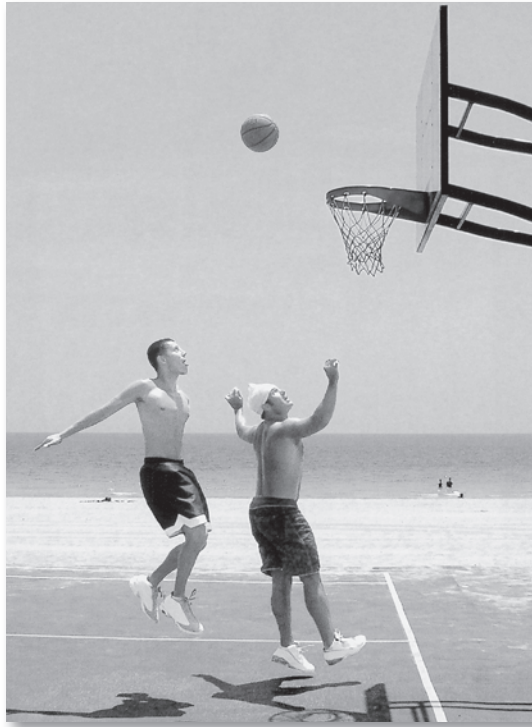


Table 2-15 Popular Sports Viewing on TV for Adults (2012)

Overall			Men			Women		
Rank	Sports	%	Rank	Sports	%	Rank	Sports	%
1	Professional baseball (NPB)	61.5	1	Professional baseball (NPB)	73.3	1	Figure skating	64.8
2	Men's national football teams (including the Olympics)	56.7	2	Men's national football teams (including the Olympics)	59.7	2	National volleyball teams	55.9
3	National volleyball teams	52.1	3	High school baseball	53.4	3	Men's national football teams (including the Olympics)	53.8
4	Figure skating	50.8	4	Women's national football teams	49.7	4	Professional baseball (NPB)	49.8
5	Women's national football teams	49.5	5	Marathon and Ekiden	48.3	5	Women's national football teams	49.3
6	High school baseball	49.1	6	National volleyball teams	48.1	6	Marathon and Ekiden	47.5
7	Marathon and Ekiden	47.9	7	Sumo wrestling	44.0	7	High school baseball	44.8
8	Sumo wrestling	38.3	8	Major league baseball	40.1	8	Sumo wrestling	32.7
9	Professional golf	31.2	9	Martial arts (boxing, mixed martial arts, etc.)	37.9	9	Professional golf	25.3
10	Major league baseball	30.5	10	J League football (J1,J2)	37.4	10	J League football (J1,J2)	22.8
	None watched on TV	6.6		None watched on TV	5.3		None watched on TV	7.8

SSF National Sports-Life Survey (2012)

Table 2-16 Popular Sports Viewing on TV for Young People Aged 10-19 years (2013)

Overall			Boys			Girls		
Rank	Sports	%	Rank	Sports	%	Rank	Sports	%
1	Men's national football teams (including the Olympics)	60.6	1	Men's national football teams (including the Olympics)	67.7	1	Men's national football teams (including the Olympics)	52.7
2	Professional baseball (NPB)	53.0	2	Professional baseball (NPB)	63.1	2	Figure skating	51.0
3	Women's national football teams	38.5	3	High school baseball	45.4	3	Professional baseball (NPB)	42.0
4	Figure skating	37.9	4	Women's national football teams	40.7	4	Women's national football teams	36.1
5	High school baseball	37.0	5	J League football (J1, J2)	31.6	5	National volleyball teams	30.9
6	Marathon and Ekiden	29.6	6	Marathon and Ekiden	30.4	6	Marathon and Ekiden	28.8
7	National volleyball teams	24.5	7	Figure skating	25.9	7	High school baseball	27.8
8	J League football (J1, J2)	21.9	8	Professional football (Europe, South America, etc.)	25.4	8	Professional tennis	13.3
9	Professional football (Europe, South America, etc.)	16.8	9	Major league baseball	23.2	9	J League football (J1, J2)	11.1
10	Professional tennis	16.1	10	National volleyball teams	18.7	10	Professional football (Europe, South America, etc.)	7.4
	None watched on TV	12.1		None watched on TV	10.7		None watched on TV	13.8

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

III. 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 7-8% for the twelve years from 2000 to 2012, which represents less than 10% of the total adult population (Figure 2-9). Based on the rate of 7.7% recorded in 2012, the total number of sports volunteers can be estimated at about 8 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 2-10).

The results of the 2012 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 46.1%, followed by “coaching” in “day-to-day activities” at 41.6%, “running or helping sports clubs” at 39.6%, and “refereeing” at 29.9% (Table 2-17). 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 (40.3 times), followed by “running or helping sports clubs” (23.2 times) and “refereeing” (13.2 times).

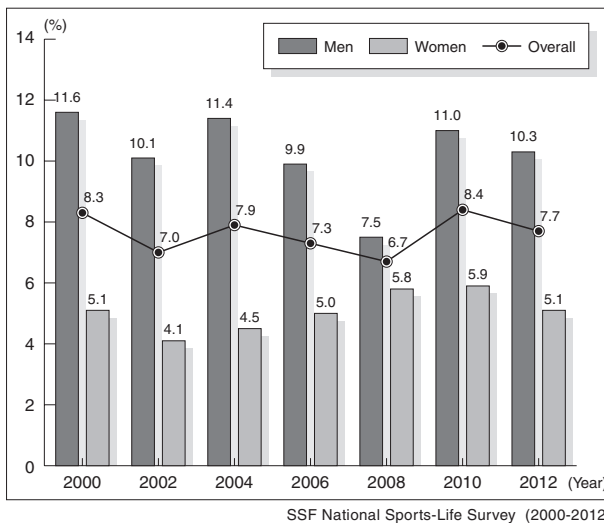
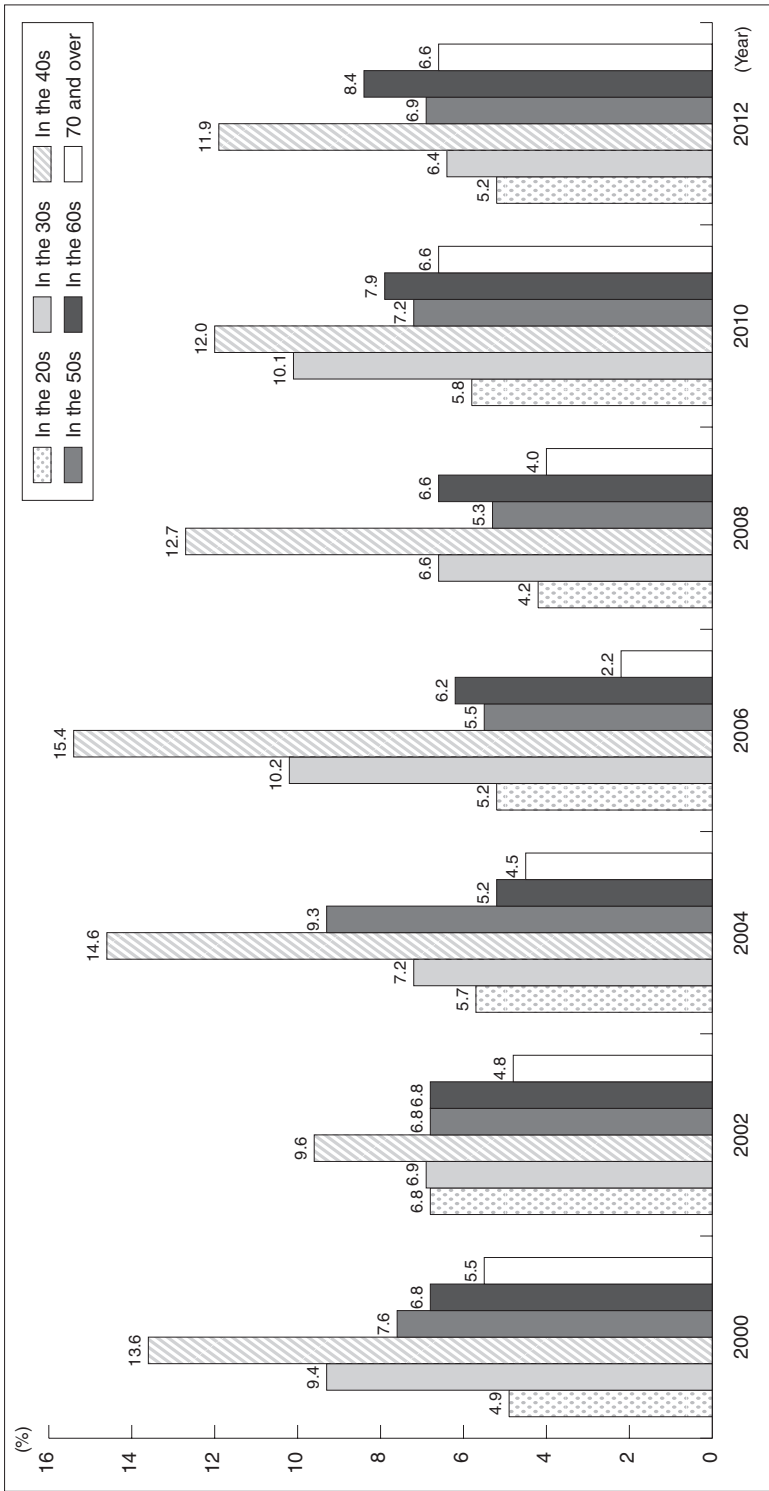


Figure 2-9 Rates of Volunteering in Sports among Adults (By Gender)



SSF National Sports-Life Survey (2000-2012)

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

Table 2-17 Types of Volunteering in Sports (Multiple Answers)

Types of sports volunteer		Participation rate (%)	Frequency (times per year)
Day-to-day activities	Coaching	41.6	40.3
	Refereeing	29.9	13.2
	Running or helping sports clubs	39.6	23.2
	Helping to manage sports facilities	12.3	11.4
Local sports events	Refereeing	21.4	6.8
	Running or helping sports events	46.1	2.9
National and international events	Refereeing	3.9	3.2
	Running or helping sports events	9.7	1.9

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 2013 SSF National Sports-Life Survey of Young People”. As shown in Figure 2-11, 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 13% for eight years from 2005 to 2013, which is 7-8 percentage points higher than that of adults.

By gender, the rate of volunteering in boys (13.5%) was 1.4 percentage points higher than that of girls (12.1%), which suggests a similar trend to that observed in adults. However, differences in gender were found to be the smallest in the most recent survey in 2013. By school year, volunteering in sports was done the most during high school years (17.4%), followed by junior high school (13.3%) and college (10.6%).

Looking at the types of volunteer work, “judging or helping judges” was ranked the highest at 43.9%, followed by “helping out at sports events” at 42.2%, and “coaching or helping coaches” at 27.0% (Table 2-18). By gender, while “judging or helping judges” was the highest for boys (48.5%), “helping out at sports events” was the highest for girls (46.7%). In terms of school years, the proportion of “coaching or helping coaches” tended to increase as the school years advanced. The proportion of “judging or helping judges” was the highest during junior high school years, and that of “helping out at sports events” was the highest during elementary school years.

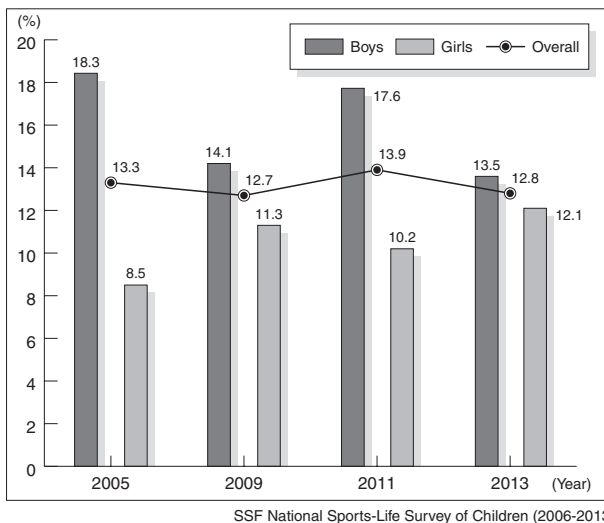


Figure 2-11 Rates of Volunteering in Sports among Young People Aged 10-19 years (By Gender)

Table 2-18 Types of Volunteering in Sports by Young People Aged 10-19 years (Multiple Answers)

(%)

Types of sports volunteer	Overall	Gender		Elementary	Junior high	High	College
		Boys	Girls				
Coaching or helping coaches	27.0	30.0	23.4	17.9	25.6	27.8	38.1
Judging or helping judges	43.9	48.5	38.3	21.4	59.0	43.3	38.1
Helping out at sports events	42.2	38.5	46.7	64.3	34.6	39.2	42.9

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

Chapter 3

Financial Resources for Sports

I. National and Local Government Budget for Sports

1. The Physical Fitness Budget

The national financial resources for sports promotion are stated in the Physical Fitness Budget. The Physical Fitness Budget is a data sheet which details all budgets related to the development of health, physical fitness and sports across the ministries in Japan. This data is prepared by the National Conference for Physical Fitness, which has a secretariat established under the Ministry of Education, Culture, Sports, Science and Technology (MEXT), and is released annually as the "Survey on the Physical Fitness Budget."

Table 3-1 shows the trends in the Physical Fitness Budget between 2003 and 2013 every five years. The Physical Fitness Budget for FY2013 was 39.6 billion yen, and MEXT had the highest ministerial budget of 31.5 billion yen, accounting for 80% of the total. This was followed by the Ministry of Health, Labour and Welfare (MHLW) (6.7 billion yen) and the Ministry of Agriculture, Forestry and Fisheries (MAFF) (1.4 billion yen). The Physical Fitness Budget for the Ministry of Land, Infrastructure, Transport and Tourism (MLIT), which amounted to 140 billion yen in FY2003 and 89 billion yen in FY2005, was not included in FY2013 owing to the establishment of MILIT's general grant for social capital in FY2010, which allows for individual subsidies for local governments to be provided as a lump-sum grant. Prior to the establishment of this grant, subsidies for programs in city parks were included in the Physical Fitness Budget (such as the maintenance costs for sports parks). However, such subsidies are no longer included in the Physical Fitness Budget.

2. Sports Budget of the Ministry of Education, Culture, Sports, Science and Technology (MEXT)

The Physical Fitness Budget for FY2013 was 39.6 billion yen in total, and included the budgets of MHLW and MAFF as well as the budget related to health promotion within MEXT. Of that amount, the budget of the Sports and Youth Bureau of MEXT take up 24.3 billion yen (Figure 3-1). In contrast with the Physical Fitness Budget, the sports budget has shown an increasing

Table 3-1 Trends in the Physical Fitness Budget

Ministry	FY2003	FY2008	FY2013
Ministry of Education, Culture, Sports, Science and Technology (MEXT)	56,427,045	38,381,975	31,481,583
Ministry of Health, Labour and Welfare (MHLW)	47,853,216	10,123,233	6,731,346
Social Insurance Agency (SIA)	57,529,630	38,448,505	—
Ministry of Agriculture, Forestry and Fisheries (MAFF)	3,736,618	5,108,405	1,387,083
Ministry of Economy, Trade and Industry (METI)	11,588	0	0
Ministry of Land, Infrastructure, Transport and Tourism (MLIT)	140,573,940	88,958,000	0
Ministry of the Environment (MOE)	14,346,376	11,444,951	9,328
Total	320,478,413	192,465,069	39,609,340

Survey on the Physical Fitness Budget (National Conference for Physical Fitness, 2003,2008,2013)

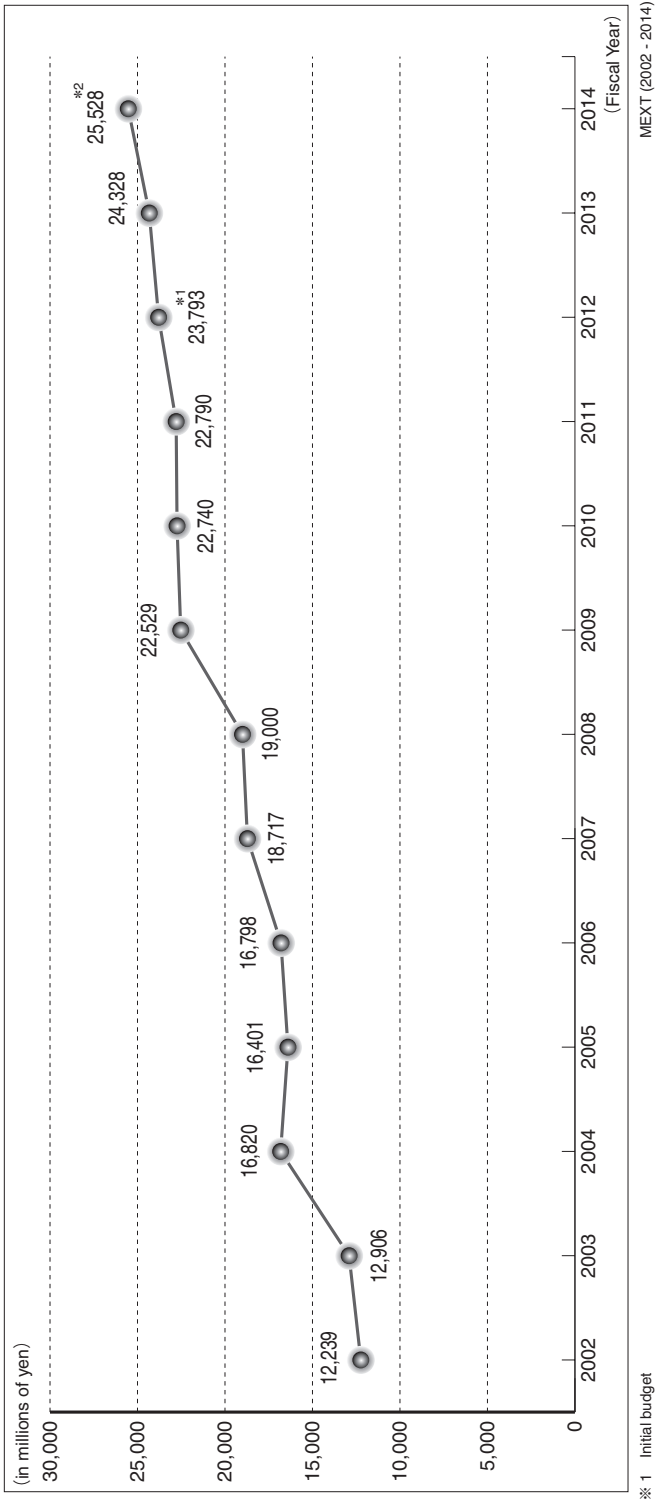


Figure 3-1 Trends in the Sports Budget of MEXT

trend, reaching a new record high every year since FY2006. Looking at the budget by policy, it can be seen that the majority of the budget was spent on enhancing high performance sports, with 7.9 billion out of the 24.3 billion yen was allocated to high performance sports. Additionally, 1.4 billion yen was allocated to "expenses necessary for achieving a lifelong sports society" and 1.4 billion yen to "expenses necessary for improving children's physical fitness." Other items included in the budget were 7.9 billion yen in grants to the Japan Sport Council (JSC) and 4.6 billion yen allocated to the maintenance of school facilities.

3. Sports Budget in Other Countries

In Table 3-2, sports budgets were compared with other countries. The sports budget of Japan was 24.3 billion yen (FY2013), which was about the same or smaller than the budgets in other countries.

4. Sports Budget of Local Governments

According to the "Survey on Local Sports Policies" (2013) conducted by MEXT, the total sports budget of 46 prefectures in FY2012 was 79 billion yen (Figure 3-2). On average, each prefecture had a budget of 1.7 billion yen.

By policy, expenses related to high performance sports was the highest of all and was 23.5 billion yen (29.8%). This was followed by 19.6 billion yen for expenses related to the maintenance of sports facilities (24.9%) and 16.2 billion yen for the operation of sports facilities (20.5%). Overall, the expenses related to high performance sports and sports facilities accounted for 75% of the total budget. Meanwhile, the amount of the budget allocated to expenses related to the promotion of lifelong sports was 2.2

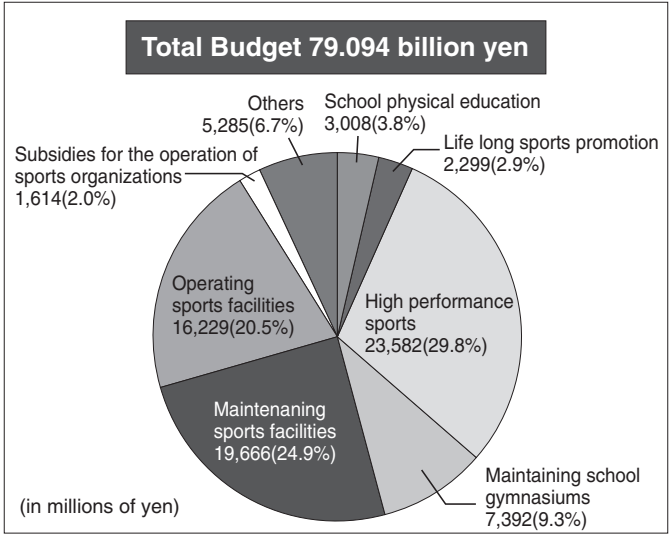
Table 3-2 International Comparison of the Sports Budgets

Country (Budget year)	Sports Budget of Ministry Responsible for Sports (In original currency)
JAPAN (2013)	JPY 24.33 million
AUSTRALIA (2013)	AUD 337 million
CANADA (2013)	CAD 331.79 million
CHINA (2013)	CNH 3,639.39 million
FRANCE (2013)	EUR 251.7 million
GERMANY (2013)	EUR 250.05 million
ITALY (2011)	EUR 60.1 million
NEW ZEALAND (2013)	NZD 841.94 million
UK (2013)	GBP 179.14 million

Data from each country

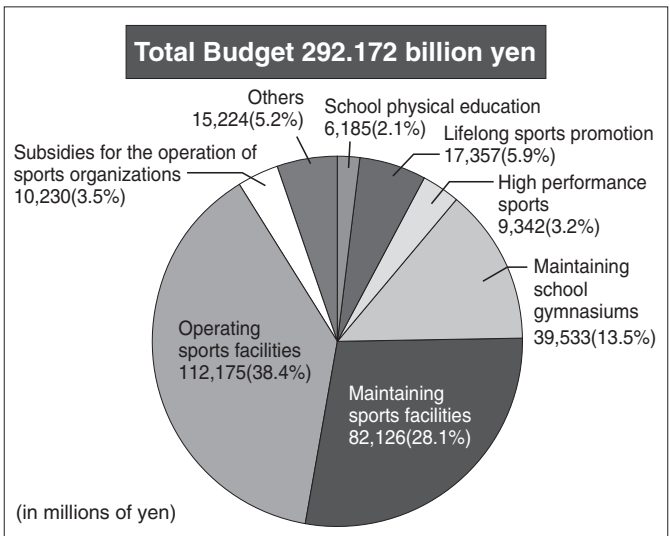
billion yen, accounting for only 2.9% of the total sports budget.

The sports budget of the municipalities (1,325 municipalities in total) was 292.1 billion yen (Figure 3-3). By policy, expenses related to the operation of sports facilities fell into the highest budget category of 112.1



Survey on Local Sports Policies (MEXT, 2013)

Figure 3-2 Sports Budget in Prefectures (2012)



Survey on Local Sports Policies (MEXT, 2013)

Figure 3-3 Sports Budget in Municipalities (2012)

billion yen (38.4%), followed by the 82.1 billion yen for expenses related to the maintenance of sports facilities (28.1%) and 39.5 billion yen for expenses related to maintenance of school gymnasiums (13.5%). The expenses related to sports facilities alone accounted for about 80% of the total budget. On the other hand, the budget related to high performance sports only accounted for 3.2% of the total (9.3 billion yen), which was significantly lower than that of the prefectures (where these policies accounted for nearly 30% of the total budget). This result suggests that prefectures are more focused than municipalities on promoting high performance sports such as the National Sports Festivals.



II. Sports Promotion Lottery and Public Gambling

1. Financial Resources from the Sports Promotion Lottery and Other Government Funding

The subsidies provided to sports projects from independent administrative agencies, which are acting bodies of governmental organizations, can be considered as another source of the finance for sports promotion. There are various subsidy programs available with many ways to support, including the partial subsidization of relevant expenses at a fixed rate.

Subsidy Programs of the Japan Sport Council (JSC)

Aimed at promoting lifelong sports and improving Japan's international competitiveness, JSC provides subsidies to sports organizations and local government bodies by administering the profits earned from sales of the Sports Promotion Lottery (known as "toto") and the operation of the Sports Promotion Fund.

Sports Promotion Lottery

In 1998, the "Act on Carrying Out, etc. Sports Promotion Lottery" became enacted for the purpose of securing financial resources for sports promotion. Following this enactment, nationwide sales of the Sports Promotion Lottery ("toto") began in 2001, which allowed people to bet on the results of professional football games. Since 2002, JSC has used some of the profits generated from the sales of "toto" to operate subsidy programs for sports promotion. Half of the proceeds from lottery sales are paid to the winners. With regard to the remaining proceeds in which miscellaneous expenses were deducted, one third is used for payments to the national treasury and the remaining two thirds is distributed to sports organizations and local governments as fundings to support their sports promotional activities (Figure 3-4). Subsidies are provided to projects focused on the promotion of lifelong sports participation, including the operation of comprehensive community sports clubs and local sports events, and also the projects related to the enhancement of high performance sports such as the identification and development of talented athletes in a more consistent manner.

Shortly after its launch in 2001, the sales of "toto" dropped by nearly one-fifth, from 64.3 billion yen in FY2001 to 13.5 billion yen in FY2006. However, after the release of "BIG" (which allowed predictions to be made randomly by a computer rather than chosen by lottery buyers) in September

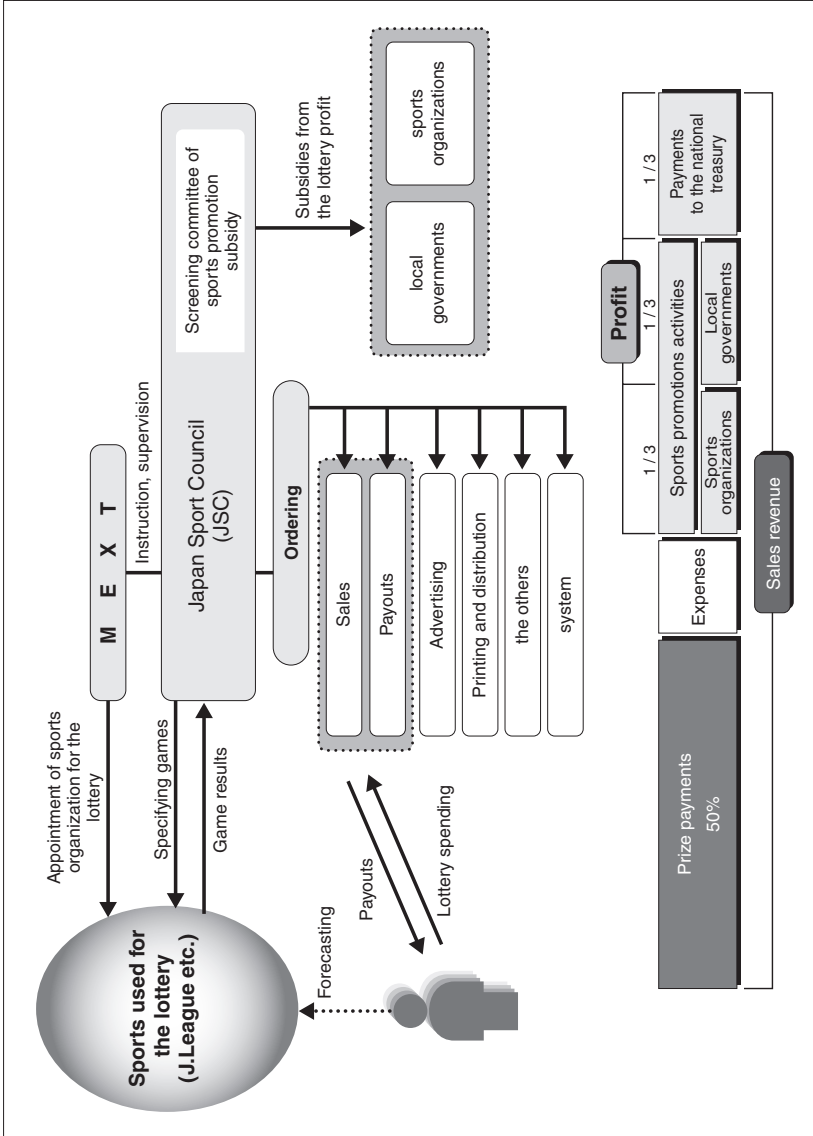


Figure 3-4 Sports Promotion Lottery System and Allocation of Sales Revenue (2013)

2006 the sales turned around and reached a record high of 89.7 billion yen in FY2008. The sales of "BIG" have remained at a level exceeding 80 billion yen in the last few years (Table 3-3) and the second highest record of 86.1 billion yen was reached in FY2012. Subsidy amounts have also been on the rise, from 8.9 billion yen in FY2010 to 12.8 billion yen in FY2011, 14.7 billion yen in FY2012 and 15.1 billion yen in FY2013.

Moreover, prior to the revisions of the "Act on Carrying Out, etc. Sports Promotion Lottery" made in May 2012, professional football league "J. League" matches were the only subjects of the football lottery, which meant that there were no sales of "toto" during the winter season. The revised Act expanded this system, allowing people to also bet on overseas matches, and increased the sales volume during the winter. In addition to this revision, the "Act for a Partial Revision of the Act on Carrying Out, etc. Sports Promotion Lottery and the Act on the National Agency for the Advancement of Sports and Health" also underwent the revision, which allowed for up to five percent of the total sales of "toto" to be allocated for the maintenance of large-scale sports facilities.

Table 3-3 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	—	15,116 <2,841>

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 (2013)

Sports Promotion Fund

The Sports Promotion Fund was established in 1990 within the National Stadium and the School Health Center of Japan (the predecessor of the present JSC) through a government investment of 25 billion yen for the purposes of enhancing high performance sports, as well as increasing participation in grassroots sports. Using its 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 instructors.

The amount of all subsidies for FY2013 was 1.29 billion yen, which is almost double the amount of FY2008 (Table 3-4). However, the primary reason behind this two-fold increase was because there was an allocation of 640 million yen, from the profits of the satisfactory sales of sports lottery, to the "Subsidy for the Activities of Athletes and Instructors". The subsidy amounts from the Sports Promotion Fund alone have remained almost at the same level.

Subsidies for Projects 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 total amount of these subsidies has remained at almost the same level since FY2003 (approximately 596 million yen). In FY2013, approximately 360 million yen (used to fund 56 projects) was subsidized through the "Sports Organizations' Enhancement Activities for Priority Sports" and 157 million yen (used to fund 13 projects) was allocated through the "Sports Organizations' Operational Activities of Top-League Teams". The total amount of subsidies for FY2013 was 517 million yen.

Table 3-4 Trends and Breakdown of Sports Promotion Fund Subsidies

Subsidy category	FY	2003		2008		2013	
		Subsidized amount <Number of subsidized projects>	Subsidized amount <Number of subsidized projects>	Subsidized amount <Number of subsidized projects>	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(domestic and overseas training camps, sending teams, etc.)		274,054 <142>	138,916 <66>	336,242 <43>			
2. Subsidy for sports organization's hosting of sports events(competitions, research meetings, etc. to enhance high performance sports/to promote grassroots sports)		243,077 <96>	108,760 <44>	313,257 <128>			
3. Subsidy for the activities of athletes and instructors		367,049 <324>	402,324 <357>	640,150 <445>*1			
4. Subsidy for internationally competitive sports activities		5,000 <1>	0 <0>*2	0 <0>*2			
Total		889,180 <563>	650,000 <467>	1,289,649 <616>			

Note : the subsidized amount refers to the amount granted.

*1 Those allocated from Sports promotion lottery subsidies.

*2 This does not mean that the subsidy category has been abolished, but only that there were simply no eligible projects for the subsidy.

Japan Sports Council (2013)

(in thousands of yen)

2. Financial Resources from Public Gambling and Lotteries

Financial Resources for Sports Promotion from Public Gambling

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 11.7 billion yen in revenue from public races, sports-related projects received 1.2 billion yen, accounting for approximately 10.5% of the total (Table 3-5).

The largest fund for sports projects was received in revenue from motorboat racing, totalling approximately 1 billion yen in FY2012. This was followed by 190 million yen in funds from Keirin and motorcycle racing, and 17 million yen from horse racing.

The Japan Keirin-Autorace Association (JKA; the organization for pari-mutuel keirin and auto race competitions in Japan) utilizes revenue generated from Keirin and motorcycle racing to subsidize sports, as well as to promote bicycle racing. In FY2013, the budget of JKA amounted to 740 million yen. Some of the tax revenue from motorboat racing has been used for promoting lifelong sports through the activities of 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 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 73 million yen to 104 research projects.

Financial Resources for Sports Promotion from Public Lotteries

From the profit derived by lottery ticket sales, approximately 41% of the revenue goes to prefectures and ordinance-designated cities where the tickets are issued, which is then utilized in public works. Through the Japan Lottery Association and the Japan Center for Local Autonomy, 1% of the sales revenue is also used to subsidize various projects including sports-related projects as part of the lottery's contribution to society.

Table 3-5 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 (%)
Horse racing *1	1,448,776 (19)	17,155 (2)	1.2
Motorboat racing *2	7,034,931 (2,247)	1,022,047 (13)	14.5
Keirin / Motorcycle racing *3	3,242,070 (299)	187,735 (25)	5.8
Total	11,725,777 (2,565)	1,226,937 (40)	10.5

*1 The amount and number of subsidies to farming promotion projects. Based on the budget of FY2013.

*2 The amount and number of subsidies from public interest or welfare-related projects. Based on the financial results for FY2012.

*3 The amount and number of subsidies from grants to the promotion of public interest projects. Based on the financial results FY2013.

Japan Racing Association, the Nippon Foundation and JKA (2013)

One of these projects is known as the P.R. Project for the Lottery's social contributions, and is a subsidy program of the Japan Lottery Association. In FY2012, a total of 377 million yen was provided to 13 projects related to health and physical fitness through this program. A similar subsidy program run by the Japan Center for Local Autonomy is referred to as the "Lottery P.R. Campaign Project". In FY2012, a total of 383 million yen was provided to 25 organizations that held the Takarakuji (Lottery) Sports Fairs.



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 144.5 billion yen for FY2012 (Table 3-6). The breakdown of this revenue included 86.6 billion yen in income from the Sports Promotion Lottery, 5.2 billion yen in grants from MEXT for operating expenses, 3.4 billion yen in subsidies from MEXT for facility maintenance, and 2.5 billion yen in income from operating the National Stadium.

JSC's total expenditures for FY2012 were 139.3 billion yen. The breakdown for the expenditures in the lottery account included 43 billion in payments of lottery prizes, 8.2 billion yen in payments to the national treasury, 19.9 billion yen for operational expenses, and 16.3 billion yen for subsidy programs. Others included 960 million yen for the operational expenses of the National Training Center and 2.8 billion yen for the operational expenses of the Japan Institute of Sports Science (JISS).

Japan Sports Association (JASA)

The revenue of JASA for FY2012 was 8.1 billion yen. The breakdown of this revenue included 3.6 billion yen from received subsidies, 2 billion yen from donations, 1 billion yen in business profits and 758 million yen from registration fees (such as registration fees for certified sports instructors). The breakdown of the received subsidies included 2.7 billion yen in Sports Promotion Lottery subsidies (for supporting projects such as

Table 3-6 Revenue and Expenditure of Sports Organizations

Name of organization	Total amount for FY2012	
	Revenues (yen)	Expenditures (yen)
Japan Sport Council	144,586,174,968	139,314,371,996
Japan Sports Association	8,123,075,760	8,158,649,269
Japanese Olympic Committee	8,627,238,905	8,339,275,585
National Recreation Association of Japan	941,513,902	948,950,866

Data from each organization (2013)

the establishment and development of Comprehensive Community Sports Clubs), 405 million yen in national subsidies (for projects such as the Japan-Korea Sports Exchange Program) and 346 million yen in consignment fees from MEXT. Most of the accrued revenue from received donations came from the financial world.

The JASA's total expenditures for FY2012 were 8.1 billion yen. The breakdown of these expenditures included 7.9 billion yen for operational expenses and 166 million yen for management expenses. Operational expenses were dominated by subsidy payments of 2.8 billion yen and donation payments of 1.9 billion yen, with both combined accounting for over 60% of the total.

Japanese Olympic Committee (JOC)

The revenue of JOC for FY2012 was 8.6 billion yen. The breakdown of this revenue included 3.3 billion yen from received subsidies, 3.4 billion yen in business profits, and 1.3 billion yen from received corporate and non-corporate subsidies. The breakdown for the received subsidies included 2.5 billion yen in national subsidies (such as the grants for various sports organizations), 495 million yen in Sports Promotion Lottery subsidies, and 139 million yen in grants from 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 2.7 billion yen.

The JOC's total expenditures for FY2012 were 8.3 billion yen. The breakdown of these expenditures included 3.1 billion yen for operational expenses, 1.4 billion yen for training camp expenses, 1.1 billion yen for projects to improve coaching skills, 1.4 billion yen for international sports exchange projects, and 412 million yen for the operational expenses of the National Training Center.

National Recreation Association of Japan (NRAJ)

The revenue of NRAJ for FY2012 was 942 million yen. The breakdown of this revenue included 657 million yen in business profits and 264 million yen in received subsidies. The highest proportion of the business profits were generated from the registration of qualification certificates, which amounted to 398 million yen.

The total expenditures for FY2012 were 949 million yen. The breakdown of these expenditures included 932 million yen for operational expenses and 17 million yen for management expenses.

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

Flow of Funds within the NGBs

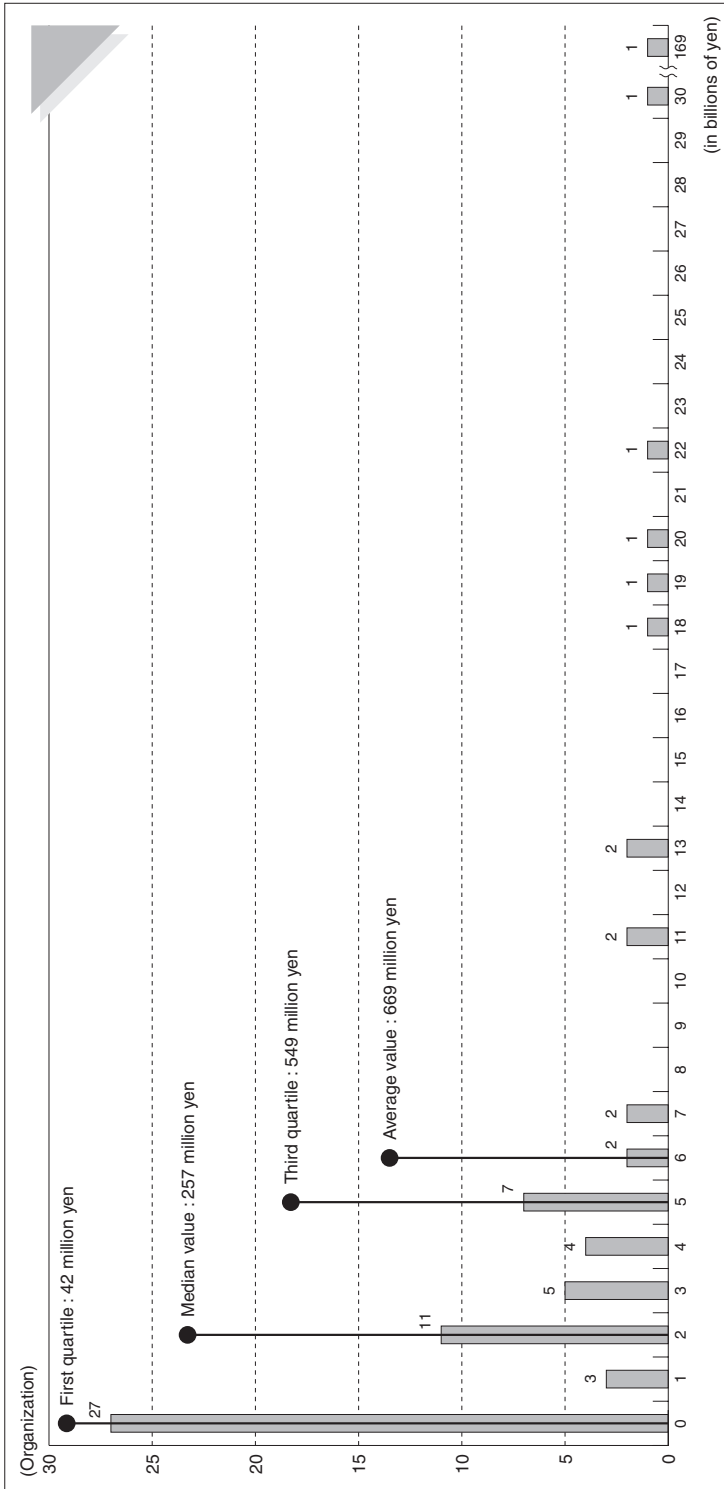
The revenue of NGBs was roughly divided into: "revenue from athletes/organizations", "business revenue", "subsidies/grants", "donations" and "asset management revenue." The breakdown of the "revenue from athletes/organizations" included annual membership fees and registration fees, which were expenses 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 3-5. The average annual revenue was 669 million yen. However, this average is not definite because of one particular organization having an annual revenue that is significantly higher (16.9 billion yen) than the others. The median was 257 million yen, the first quartile was 42 million yen and the third quartile was 549 million yen. The most frequent value (for 27 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 71 organizations was 47.4 billion yen. For comparison purposes, the closing account for revenue in FY2012 was approximately 8.1 billion yen for JASA, and 8.6 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.



The SSF Census of the National Governing Bodies of Sports (2013)

Figure 3-5 Distribution of Revenue Size (Budgets) for National Governing Bodies of Sports

IV. National Budget for High Performance Sports

1. Trends in the Budget for High Performance Programs

The enhancement of Japan's international competitiveness is one of the key national strategies included in the basic principles of the Basic Act on Sport, and also clearly stated in the Sport Basic Plan. When looking at the sports budgets of MEXT from FY2003 to FY2012, these budgets have remained steady at around 23 billion yen (Figure 3-6). From that amount, the budget for high performance sports accounted for around 60 to 80 percent of the total figures.

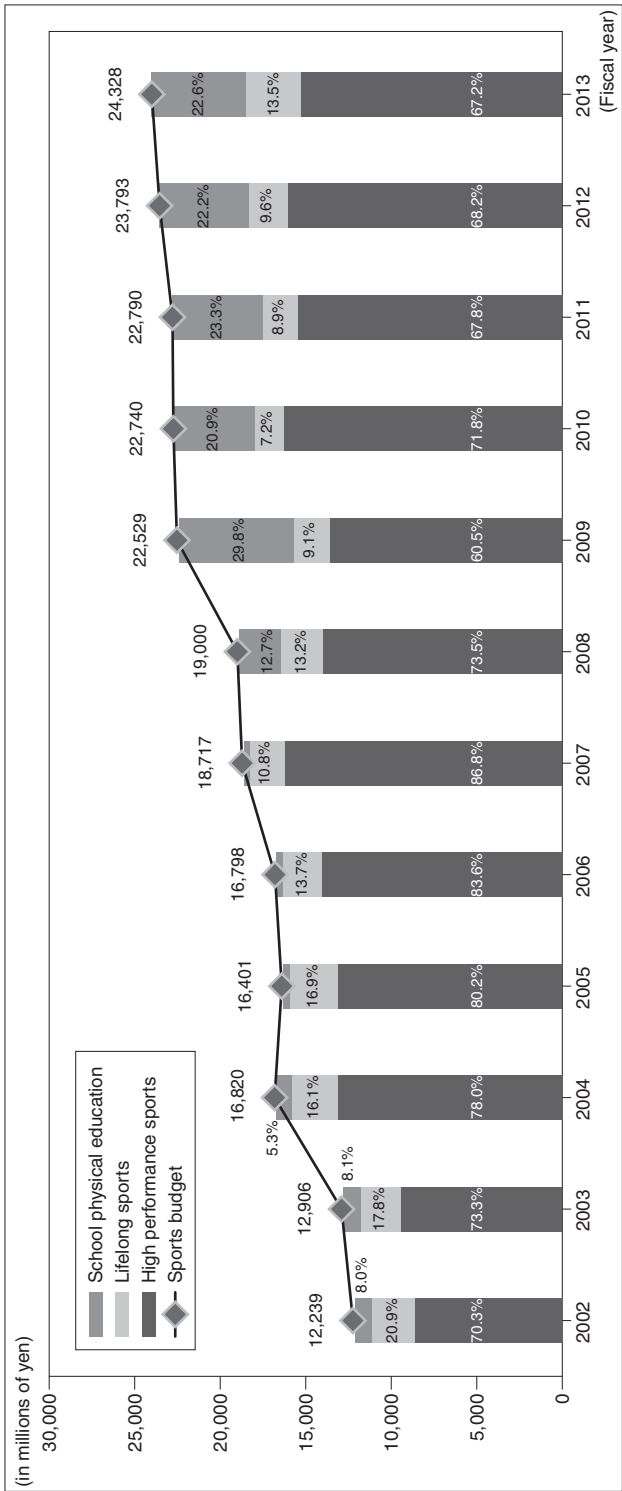
Ministry of Education, Culture, Sports, Science and Technology (MEXT)

In FY2013, MEXT allocated approximately 16 billion yen for policies related to enhancing high performance sports. These policies include identifying and developing human resources, improving sports environment, and further developing national strategies to enhance international competitiveness. In particular, approximately 2.8 billion yen was allocated to the "National Project on Enhancement of High Performance Sports" by MEXT (the largest budget of all categories, which also exceeded the amount allocated to JOC (Table 3-7)). The project targets sports which are expected to win medals at international competitions and provides specialized and advanced multidisciplinary support. To date, the project has implemented two programs: the "Multi-Support Project for top level athlete" which supports athletes by conducting researches and development projects in areas of sports medicine, science and information; and the "Development and support for female athletes" which helps to support and enhance performance of female athletes.

Japan Sport Council (JSC)

JSC promotes research activities in the fields of sports medicine, science and information at the Japan Institute of Sports Science (JISS). It also supports the enhancement of international competitiveness from various aspects in collaboration with JOC and NGBs. JISS is located adjacent to the Ajinomoto National Training Center (NTC), and operated with NTC in an integrated manner so that outcomes from its research projects can be utilized more effectively.

Moreover, JSC is responsible for the provision of subsidies with revenue generated from the Sports Promotion Lottery ("toto") and the Sports Promotion Fund to sports organizations and local governments. In FY2013,



Note : Values under 5% are not shown.

Figure 3-6 Breakdown and Trends in Sports Budget of MEXT

MEXT (2013)

Table 3-7 Budgets of MEXT and JSC for Policies to Enhance High Performance Sports (2013)

(In thousands of yen)

M E X T		
National project on enhancement of high performance sports	Multi-support project for top level athletes	2,299,522
	Development and support for female athletes	467,314
Subsidies to Japanese Olympic Committee		2,588,214
Projects related to building a system to develop medal potential athletes		467,191
Research projects related to enhancement of high performance athletes and research centers		22,166
Projects related to development of an information network for international competitions		62,684
Projects related to UNOSDP YLP (United Nations Office on Sport for Development and Peace Youth Leadership Programme)		15,722
Anti-doping promotional activities		359,679
JSC support for projects related to enhancement of high performance sports	Sports organizations' enhancement activities for priority sports	360,814
	Sports organizations' operational activities of top league teams	157,000
Subtotal		6,800,306
Sports promotion funding of JSC*		
Sports organizations to enhance performance of athletes		336,242
Sports organizations to host sporting events (related to the enhancement of high performance sports)		171,783
Athletes and trainers to support their activities and maximize their international performance		640,150
Subtotal		1,148,175
Sports promotion lottery subsidies of JSC*		
Identification and development of potential athletes		1,236,746
Subsidies for sports organizations	Projects related to sports promotional activities	1,834,846
	Projects related to anti-doping drug testing	1,210,471
	Projects related to sports arbitration	9,000
	Projects related to overseas trainings for instructors	67,215
	Projects related to strengthening of organizational structure	7,428
	Projects related to hosting international meetings	17,166
Hosting international competitions		250,656
Activities related to host the 2020 Olympic and Paralympic games		678,882
Subtotal		5,312,410
Total		13,260,891

*Amount granted

MEXT and JSC (2013)

JSC allocated 1.1 billion yen earned by the Sports Promotion Fund and 5.3 billion yen from the Sports Promotion Lottery, to a wide range of activities as subsidies in order to enhance the international competitiveness of athletes. In addition, from the amount granted to JSC by MEXT to support projects that are aimed at enhancing competitiveness, JSC granted 520 million yen to the national governing bodies .

Japanese Olympic Committee (JOC)

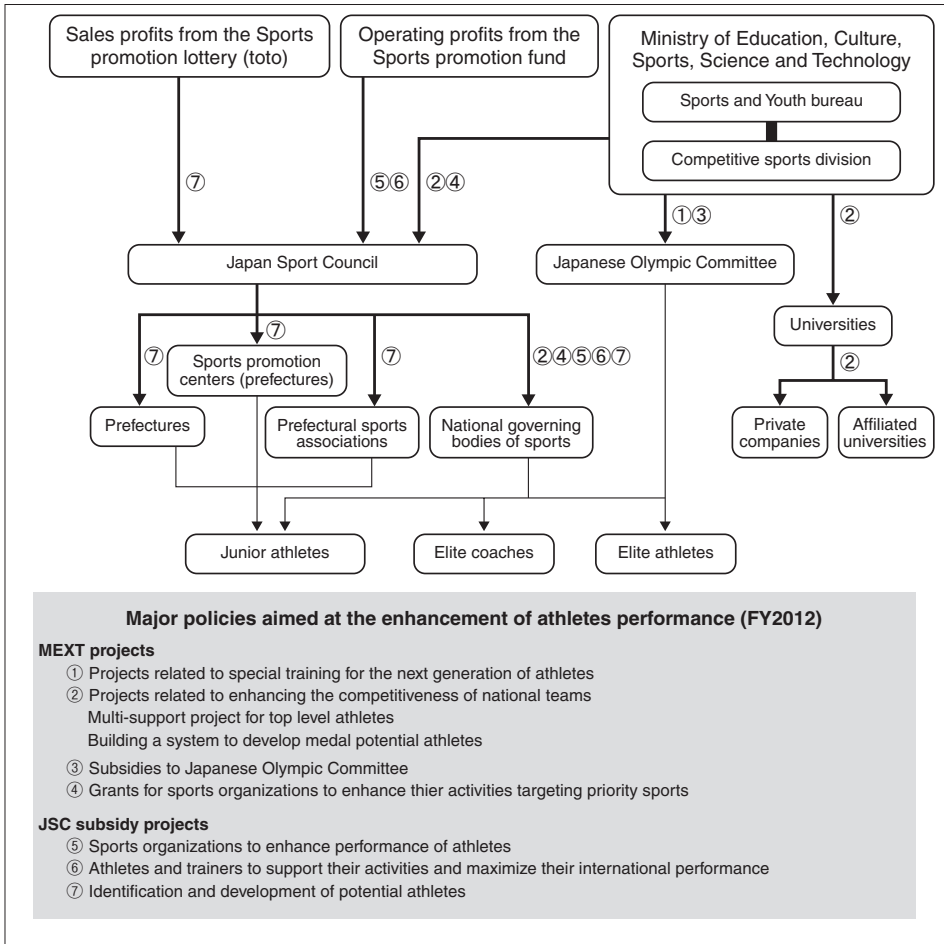
JOC conducts projects at NTC which aim to enhance athletes' performance and develop and support trainers for high performance sports. Main projects include intensive training camps, enhancement of coaching skills, and identification and training of potential athletes. JOC has also established the "Athlete Program", which identifies carded athletes for the Olympic Games. Carded athletes are those individuals who are deemed to have the ability to compete in the events at Olympic Games as a national team member, and those who are thought to have a strong potential for future success. Carded athletes can attend more effective training programs and intensive training camps held both in and outside of Japan. In 2012, the number of carded athletes was 1,775 (a total of 1,358 athletes, both male and female, carded for 29 sports in the Summer Olympic Game and a total of 417 athletes, both male and female, carded for 6 sports in the Winter Olympic Game).

In addition to revenue generated from its independent projects, JOC receives subsidies from MEXT and JSC (which in FY2013 amounted to 2.58 billion yen and 848 million yen, respectively). JOC then allocates funding to projects aimed at enhancing the performance of athletes, such as those mentioned above. The subsidy amount provided to JOC from MEXT has remained fixed in recent years, however, in FY2013, there was a drastic increase in the subsidies provided by JSC. Through these subsidies, measures to enhance high performance sports, as well as the integrity of sports, have been strengthened. In recent years, there have been more subsidies granted to projects related to doping, which has been identified as an important issue by the International Olympic Committee.

Funding for Enhancement of Sports Competitiveness

Figure 3-7 shows the flow of funds related to enhancement of high performance sports in FY2012. The primary funds were granted in the form of subsidies and trust funds from MEXT, the Sports Promotion Lottery and the Sports Promotion Fund. These funds were first given to JSC and JOC, which then distributed an amount to each sports organization (such as NGBs)

to be used towards projects for the enhancement of athletes performance. Under the National Project for the Enhancement of Japan’s Competitiveness implemented by MEXT in 2012, various projects were commissioned to universities and private companies. These projects included the development of sports equipment and better training methods by facilitating an industry-academia-government collaboration. The measures based on a longer-term perspective have also been implemented. Such measures include as the subsidies allocated by JSC to local governments and local sports associations for the purpose of developing the next generation of athletes.



MEXT (2013)

Figure 3-7 Flow of Funds related to Enhancement of High Performance Sports

Chapter 4

Sports Facilities

I. Current Status of Sports Facilities

1. Public, Private and School Facilities

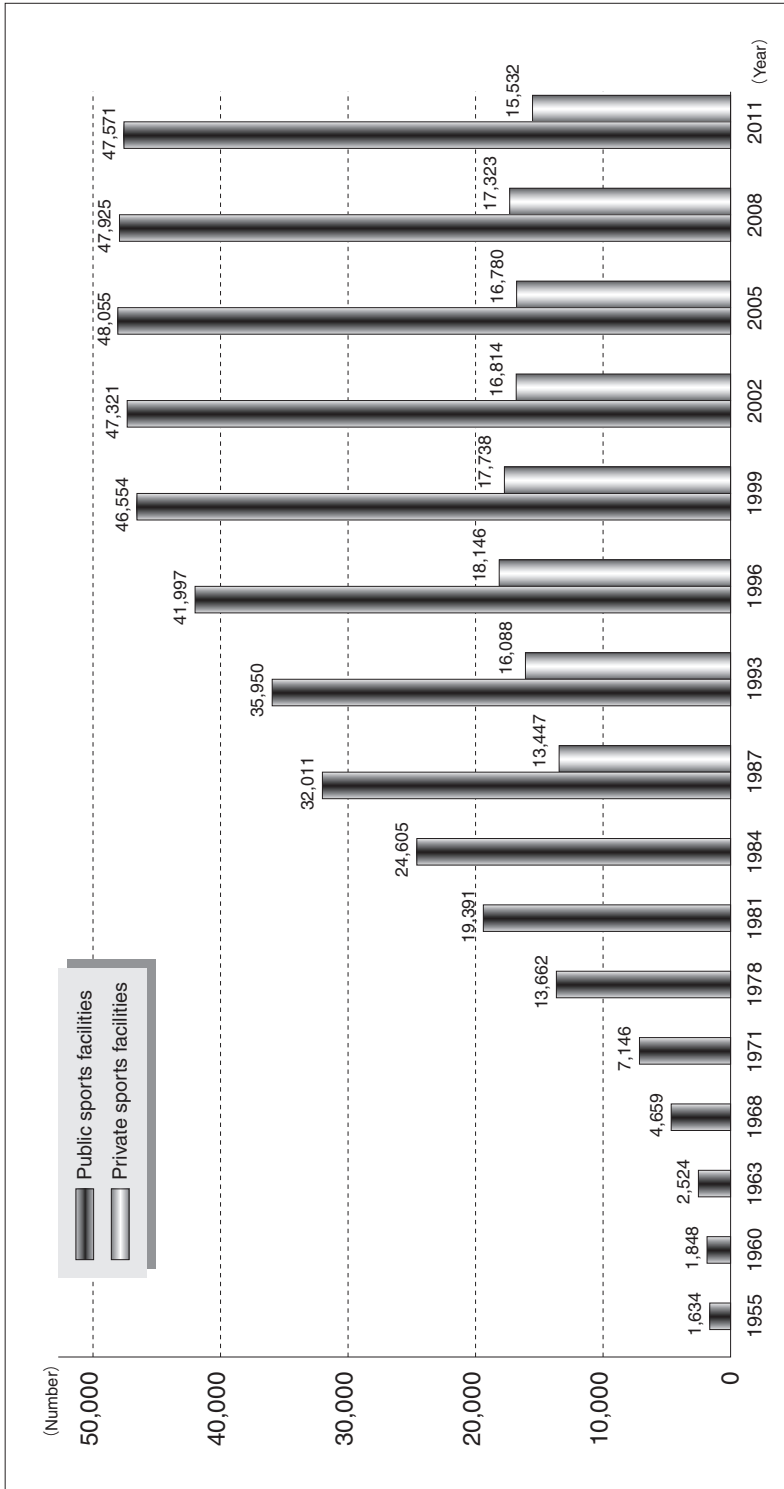
According to the “Social Education Survey” of Ministry of Education, Culture, Sports, Science and Technology (MEXT), the number of public sports facilities in Japan increased from the time the survey started in the 1950s through the 1990s. However, the number stayed almost at the same level after 2002. In 2011, the number of public sports facilities was 47,571 (Figure 4-1). Based on the survey after 1987 (the first year that private sports facilities were included), the number of private sports facilities reached a peak in 1996, and continued to decline through 2011, where the number was recorded as 15,532.

Moreover, many schools and educational organizations own sports facilities such as gymnasiums, playgrounds and swimming pools, that 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 (7,346), followed by gymnasiums (6,949), and baseball and softball fields (6,279). For school sports facilities, there were 37,339 gymnasiums, 35,933 multi-purpose playgrounds (with grounds of 992m² or more), and 28,171 swimming pools (outdoor).

Availability of School Sports Facilities

School sports facilities, which accounted for about 60% of the total number of sports facilities in Japan, have been made available for the use of local residents, pursuant to Article 13 of the Basic Act on Sport. Article



Social Education Survey (MEXT, 1955 - 2011)

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

13 states that “a party providing a national school or public school shall endeavor to provide sport facilities at the relevant school for use in general sport, as long as it does not cause any problems for education at the relevant school.” According to the “Survey on the Current Status of Facilities for Physical Education and Sports Activities” (2008) conducted by MEXT, 98.3% of municipalities have school sports facilities that are open to local residents. When the availability of each facility type was calculated by dividing the number of schools allowing public access to their sports facilities by the total number of schools having sports facilities, gymnasiums had the highest availability rate at 87.3%, followed by outdoor sports fields (school grounds) at 80.0%, and swimming pools at 26.7%, suggesting that many schools had their gymnasiums and school grounds open to the public.

However, when the availability of those open facilities was closely looked at throughout the year, it was found that elementary school gymnasiums (which had the highest availability rate of 95.1%) were not necessarily available at all times. For example, such facilities were made available to the public only during the school holiday, or only on certain days when access was requested. Looking at the availability rate by days of the week during the school term, weekdays had the highest availability rate at 75.5%, followed by Saturdays at 67.4% and Sundays at 63.9%.

One of the issues affecting the availability of open facilities may be limitations placed on the use of facilities by any new groups, because existing groups feel the need to ensure their access to the schools and facilities during their service hours. Recently, however, some municipalities

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

	Public sports facilities	School sports facilities
Multi-purpose playgrounds	7,346	35,933
Gymnasiums	6,949	37,339
Swimming pools (outdoor)	2,093	28,171
Swimming pools (indoor)	1,615	788
Tennis courts (outdoor)	4,963	9,542
Tennis courts (indoor)	194	80
Baseball / softball fields	6,279	1,914

have commissioned the operation of school facilities to comprehensive community sports clubs (see page 110), which have helped to raise the operation rates of those facilities. In order to make school sports facilities more open to local residents, it is necessary to take measures that will facilitate more effective use of these facilities.

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 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 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 subsidy programs, the subsidy from MEXT for the maintenance of public sports facilities and the subsidy from Ministry of Land, Infrastructure, Transport and Tourism (MLIT) for the Maintenance of City Parks have made a particularly strong contribution to maintaining public sports facilities.

Subsidy for Public Sports Facility Maintenance

The Subsidy for Public Sports Facility Maintenance of MEXT was a financial assistance program which was intended to address the expenses occurring for the maintenance of community facilities including sports centers, swimming pools, outdoor sports centers and martial arts centers. This subsidy was available between the 1950s and 2005. When it reached a peak in 1985, the total amount of the government subsidy was 7.8 billion yen, however, this amount decreased to 1 billion yen in 2005 (Table 4-3). In 2006, the main subsidy program was renamed as “Grant for Safe and Reliable School Development”, and in 2011 it was again renamed as the “Grant for School Facility Improvement.” As the Subsidy for Public Sports Facility Maintenance has been included in the grants mentioned above since 2006, the exact amount of funding is unknown.

Table 4-2 Major Subsidy Programs for Sports Facility Maintenance

Program	Period	Subsidy rate	Subject (Sports facility)
Subsidy for public sports facility maintenance	~2005	1/3	Public sports center, public swimming pool, public outdoor sports center, public martial arts center, etc.
Grant for safe and reliable school development	2006~2010	1/3	
Grant for school facility improvement	2011~	1/3	
Subsidy for city park maintenance	~2009	1/3 for the land 1/2 for the facility	Baseball field, track and field ground, football pitch, rugby ground, tennis court, basketball court, ski resort, swimming pool, boating course, skating rink, sumo arena, horse riding center, etc.
Grant for community development	2004~2009	Approximately 40% of the project cost	
Grant for comprehensive social infrastructure development	2010~	If the subsidy rate is indicated by any existing law, that rate shall be applied, otherwise the subsidy rate is 50%.	Gymnasium, swimming pool, sports ground, park, green area, ski resort, skating rink, camp ground, promenade, cycling road, etc.
Grant for areas with electric power stations	1974~	The maximum amount of the grant is decided based on the facility and operational conditions of electric power stations. The amount of the grant is determined by each municipality.	
Grant for environmental improvement of areas with specified defense facilities	1974~	The amount of the grant is determined by each municipality.	Sports or recreational facility (gymnasium, sports ground, park, etc.)
Grant for maintenance of the natural environment	2005~	Up to 45%	Nature trail within a national park
Grant for maintenance of facilities for regional exchanges	2002~ (new program is till 2009)	In principle, around 30% of the expenses are subject to the subsidy	Sports and recreation facility

Research on the Public Sports Facilities Management Fund (Miyazaki & SSF, 2012)

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

Fiscal year	Amount (in thousands of yen)	Program
1985	7,791,344	Subsidy for public sports facility maintenance
1986	6,672,682	
1987	5,801,441	
1988	5,801,441	
1989	6,346,479	
1990	6,346,479	
1991	6,647,369	
1992	6,684,800	
1993	6,640,757	
1994	5,116,912	
1995	4,712,016	
1996	4,793,715	
1997	4,387,695	
1998	4,033,650	
1999	3,011,936	
2000	2,369,554	
2001	1,472,114	
2002	1,286,094	
2003	1,169,080	
2004	1,060,420	
2005	1,023,000	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.
2006	49,449,000	
2007	70,970,000	
2008	74,867,000	
2009	75,068,000	
2010	78,354,000	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.
2011	43,587,000	
2012	24,339,000	
2013	39,477,000	

Note : Only the initial budget is shown.

Funding related to the National stadium and the Nagano Olympic games is not included.

MEXT (2013)

Subsidy for City Park Maintenance

The Subsidy for City Park Maintenance of MLIT was a financial assistance program which was provided for maintenance projects of city parks, including district parks for neighboring residents, general city parks, large-scale parks, government-run parks and green parks. This program was implemented between the 1950s and 2009. Among these city parks, many playgrounds (used as the major public sports facility) were categorized as a type of general city park by MLIT. This subsidy program was available to a wide range of facilities, including large-scale facilities such as baseball fields, track and fields, football grounds, sumo arenas and archery ranges (Table 4-4).

Currently, the Subsidy for City Park Maintenance has been integrated with the “Grant for Comprehensive Social Infrastructure Development”, which is a system established in 2010 to provide individual subsidies to the local governments under the jurisdiction of MLIT as lump sum payments.

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 2013, a total subsidy amount of 4.13 billion yen was provided to 190 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 2013, a total subsidy amount of 1.57 billion yen was provided to 7 projects.

Table 4-4 Main Facilities of City Parks subjected to the Subsidy

Type	Garden/ Ground	Leisure facility	Recreation facility	Sport facility
Category	Garden	Resting place	Swing	Baseball field
	Ground	Bench Outdoor table Camping area Others	Slide Seesaw Jungle gym Ladder Sandpit Shallow pool	Track and field Football ground Rugby ground Tennis court Basketball court Volleyball court Gateball court Swimming pool Hot spring health and sports facility Sports facility for rehabilitation Boating course Skating rink
				Ski resort Sumo arena Archery range Horse riding course Horizontal bar Rings Others (similar to those listed above) Accompanying structures (stands, shower rooms, etc.)

MEXT (2013)

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. The annual operating expenses of the NTC have varied from 1.07 billion yen (in FY2010) to 1.33 billion yen (in FY2011) and then 960 million yen (in FY2012). With regard to the operations of the NTC, the Japanese Olympic Committee (JOC) is striving to make more effective use of the center by expanding projects that include athlete training camps and the JOC Sports Academy (JOC Elite Academy Program, JOC National Coach Academy Program and JOC Career Academy Program) in cooperation with the national governing bodies of sports (NGBs). For the first time in Japan, the NTC has a sponsor with the naming rights, and the center is often referred to as the "Ajinomoto National Training Center."

The NTC has training facilities dedicated to 17 different types of sports. Its indoor training center consists of various training fields exclusively dedicated to ten different types of sports, as well as a track and field complex (containing a 400m all-weather track with six lanes, an infield track, a sloping track, a sand track, etc.) and an indoor tennis court (with two hard courts and two en-tout-cas courts). Furthermore, more facilities for five other sports are available at the Japan Institute of Sports Sciences (JISS) adjacent to the NTC.

Each training facility is exclusively designed for a particular sport and is equipped with the tools and equipment that conform to international rules with the aim of providing an environment where elite athletes can concentrate on their training in a relaxed state. The "Athlete's Village" can accommodate 448 people, and is used for various types of camps and long-term stays. The "Sakura Dining" facility also provides well-balanced and high quality meals which are essential for maintaining the physical

condition of athletes. By collaborating with the Sports Medicine/Science Research Program and the Sports Clinic Program operated by the JISS, the NTC is able to provide effective training that incorporates sports medicine and science.

Among the 38 medals won by athletes at the 2012 London Olympics, 34 medals were received by the 17 sports where the NTC provides exclusive training facilities. Moreover, 69 out of the 80 top-eight finishes were from those 17 sports. As indicated by these results, the highly advanced training that is provided to athletes at the NTC, development in sports medicine and science at the JISS, and multi-support programs provided to sports that have potential to win medals, have all contributed to the results achieved at the 2012 London Olympics. Although NGBs used to arrange their own training facilities individually in the past, as a result of the establishment of the NTC, there has been more active communication between and across organizations at all levels, including between athletes, coaches and support staff, all of which further deepen the sense of unity as “Team Japan.”

Some sports such as water sports (sailing, boating and canoeing), outdoor sports (football, hockey, cycling, horse riding, rifle shooting, pentathlon and archery) and high-altitude training cannot be accommodated by the NTC, therefore, existing training facilities throughout the country have been designated as “Event-Specific Affiliated National Training Center Facilities” since 2007. Strong collaborations, as well as an information network system, have been built between the NTC and those facilities.

Usage of the NTC

To ensure the effective and efficient operation of the NTC’s exclusive training facilities, an annual usage plan is prepared by national coaches, assistant national coaches and coaching directors. In the four years from 2008 to 2011, almost all of the NTC’s exclusive training facilities showed a high occupancy rate and were occupied over 300 days every year. By using the facilities at the NTC, sports organizations are now able to conduct national level practices and training camps in a more stable and productive manner.

The “Athlete’s Village” has also been designed to accommodate the various needs of athletes by offering different types of rooms, such as single, twin and apartment-type rooms, where the JOC Elite Academy athletes can stay on a longer term. The “Athlete’s Village” offers comfortable living environments as well as various amenities such as a large public bath, a theater room and a Japanese-style room. Compared to the number of users in FY2008, which was 52,132 people in total, the number in FY2011 increased

to 78,773. The occupancy rate (which was obtained by dividing the number of rooms in use by the total number of rooms) was 68.8% in FY2008, 75.7% in FY2009, 75.2% in FY2010 and 59.7% in FY2011.

2. 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 October 1, 2013, 22 facilities have been designated as “Event-Specific Affiliated National Training Center Facilities” for 19 sports and a high-altitude training activity (Table 4-5).

The Nagano Municipal Bobsleigh & Luge Park (The Spiral)

The Spiral was constructed as an Olympic venue for the 1998 Winter Olympics held in Nagano City. It is the only facility available in Asia where official competitions for bobsleigh, luge and skeleton can be held. The construction cost of the Spiral was approximately 10.1 billion yen (with around 9.5 billion yen for the facility itself and 600 million yen for the land) and it is managed directly by the Physical Education Division of the Nagano City Board of Education. In 2007, the Spiral was designated as the Event-Specific Affiliated NTC Facility for bobsleigh, luge and skeleton by MEXT, and since then it has contributed to enhancing Japan’s international competitiveness as the training base for elite athletes in those sports.

The bobsleigh/luge track is 1,700 meters long and has a total of 15 curves. With a high regard given to its environmental impact, the course was designed to suit the shape of the land, resulting in a unique design with two uphill sections in the middle of the course. A short course has also been created to accommodate visitors who would like to experience luge/skeleton rides. The long track can be used only for about two months every year, in December and January when the track is artificially frozen. In addition to a starting hut, a control building, measurement facilities and storage facilities that are all necessary for the sports, and a 120m push-start track (a wheeled training course) has also been built within the facility. Moreover, after being designated as the Event-Specific Affiliated NTC Facility, the Spiral added a training gym as a separate facility for carded elite athletes, and two full-time NTC staff are employed to provide athletes with support around sports medicine and science.

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

Category	Sports	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 olympic memorial arena, "M-Wave" Meiji Hokkaido-Tokachi oval (an indoor speed skating rink in the Obihiro-no-mori)	Nagano 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)
Boating		Toda park boat course & Toda boathouse	Saitama
Canoeing		Kibagata canoe course	Ishikawa
Outdoor sports	Football	J-Green Sakai	Osaka
	Hockey	Gifu prefectural green stadium	Gifu
	Cycling	Japan cycle sports center	Shizuoka
	Equestrian	Gotenba horsemanship and sports center	Shizuoka
	Shooting rifle	Nagatoro shooting range	Saitama
	Modern pentathlon	Japan Self-Defense Forces physical training school	Saitama
	Archery	Yamaha resort archery stadium, "Tsumagoi"	Shizuoka
High-altitude training		Hida ontake kougen highland sports training area	Gifu
		Zao bodaira athlete village	Yamagata
Total : 20 sports, 22 facilities			

MEXT (2013)

In 2012, a total of 2,221 athletes ran the course for 4,516 times. Additionally, there were 4,595 visitors to the Spiral (not including athletes), meaning that about 380 people visited the facility on a monthly average.

Freezing the surface of the 1,700 meter long course requires a great deal of maintenance and labor costs. In order to cool down the entire course, a non-freezing liquid which is cooled to minus 20 degrees Celsius is continuously poured into the pipes that run through beneath the course. Around 50 staffs are required to make surface ice around-the-clock for two weeks. Damage caused by the aging of the facility cannot be avoided, resulting in annual operational and repair costs to reach around 200 million yen.

Although the presence of the Spiral is quite significant, it is possible that sports like bobsleigh, luge and skeleton may not survive in the sports market, and the characteristics of its high cost place a serious burden on the municipal government.

The Karuizawa Kazakoshi Park Curling Arena (The Karuizawa Ice Park)

The Karuizawa Ice Park is the largest year-round curling arena in Japan, and opened on April 1, 2013. In accordance with the project specified in the “Act on the Construction of Karuizawa as Town of International Goodwill, Culture and Tourism” enacted in 2001, the “redevelopment of a cultural resource for winter sports” has been carried out, and the Karuizawa Ice Park is conceived as a park that will also boost tourism. The total construction cost was approximately 2.1 billion yen and was covered by the Karuizawa Town and Government Subsidy for Park Maintenance project. The designated manager is the Kazakoshi Park Co-operation (a joint venture of the public corporation “Karuizawa Town Sinko Kosha” and the NPO “SC Karuizawa Club”). Since this appointment, the company has managed the park through funding of approximately 100 million yen every year. The primary training base for curling has now moved to the Karuizawa Ice Park from the SCAP Karuizawa, which had been the major base for curling since the opening of the 1998 Winter Olympics in Nagano. Meanwhile, the SCAP Karuizawa will be refurbished, and reopen in 2014 as an indoor swimming pool.

The Karuizawa Ice Park is installed with six curling sheets and 367 audience seats (including those for coaches) and is fitted with permanent panel heaters, staff rooms, an ice making room, a doping control room, dressing rooms and shower rooms. It has a total seating capacity (including temporary seating) of approximately 1,000 people. The facility also has ceiling-mounted TV cameras that can track every move of players and the

curling stone. Other features include a multi-purpose space from where the curling sheets can be viewed, a cafe and conference rooms. Adjacent to the facility, there are also other outside sports facilities that include a roller skating rink and an artificial turf-covered Futsal court that are open during the summer season, and a 400m² ice-skating rink that is open during the winter season.

In total, the number of people who used the facility for the four months from April through July 2013, was 8,617 people for the curling hall, 391 people for the roller skating rink and 637 people for the Futsal court. As well as curling-related sports organizations, the facility was used by a wide range of groups such as college students participating in college teams or research seminar camps, individuals or companies participating in conventions held in town, and companies or organizations visiting Karuizawa for company retreats or training. This “curling town” has contributed to the revitalization of the local community as well as promotion of curling.

Through the MEXT’s project to ensure proper utilization of the Event-Specific Affiliated NTC Facility, a national subsidy of approximately 15 million yen has been allocated to the Karuizawa Town Sinko Kosha to improve the training environment of the curling facility, and to enrich the athletic support provided through sports medicine and science. This subsidy has been used to cover the cost of rinks and training center rooms for both the men’s and women’s national teams. Curling became an official Olympic event at the 1998 Nagano Winter Olympics (although previously held at the 1924 Winter Olympics in Chamonix for the men’s division). There is a high expectation within the community that the Karuizawa Ice Park will not only increase the number of curling players and enhance Japan’s international competitiveness in curling, but also attract more tourists to Karuizawa.



Karuizawa Ice Park Appearance

The Zao Bodaira Athlete Village

The Zao Bodaira Athlete Village is a high-altitude training facility which was built in Kaminoyama City, Yamagata Prefecture in 1997. In Kaminoyama City (where track and field has always been popular) the construction of the Village included land reclamation work that took place at a cost of approximately 1 billion yen. Since 2008, the Village has been designated as an Event-Specific Affiliated NTC Facility.

There are three main facilities within the Village: the Bodaira Green Ground which is an all-weather sports ground; the Cross Country Course which is the first permanent course in Eastern Japan; and the ZAO Tairagura which is equipped with indoor training rooms and a gymnasium.

There is another Event-Specific Affiliated NTC Facility for high-altitude training in Takayama City, Gifu Prefecture - the Hida Ontake Highland Training Center. However, because its altitude exceeds 2,000 meters, it is considered the most suitable for senior athletes who have previous experience in high-altitude training. Zao Bodaira Athlete Village, on the other hand, with an altitude of around 1,000 meters, is suitable for junior athletes and beginners, and can be utilized for other sports or events that are not limited to track and field, such as ball games and winter sports.

The facility is administered by the Tourism Division of Kaminoyama City and is managed by the Yamako Resort, a local company appointed as the designated manager. The designated management fee is between 25 to 30 million yen per year, and the revenue and expenditure are almost balanced. The Yamako Resort also operates a ski resort near the facility, and its lodges have been accommodating athletes, allowing to serve both the training facility and the accommodation at the same time. Moreover, the lodge has a low oxygen chamber and a high pressure oxygen cabin installed, offering an environment where athletes can focus on their training and recovery in a more structured manner.

Since its designation as an Event-Specific Affiliated NTC Facility in 2008, the number of users has been on the rise, reaching a total of at least 70,000 people in FY2012 (users of the three facilities and guests of the lodge combined). Future plans are to promote the Village as the main venue for high-altitude training in Japan to improve international competitiveness by developing a better quality training environment, increasing access for junior athletes and local sports organizations, and establishing a sports medicine and science-based framework of support.

III. Sports Facilities for People with Disabilities

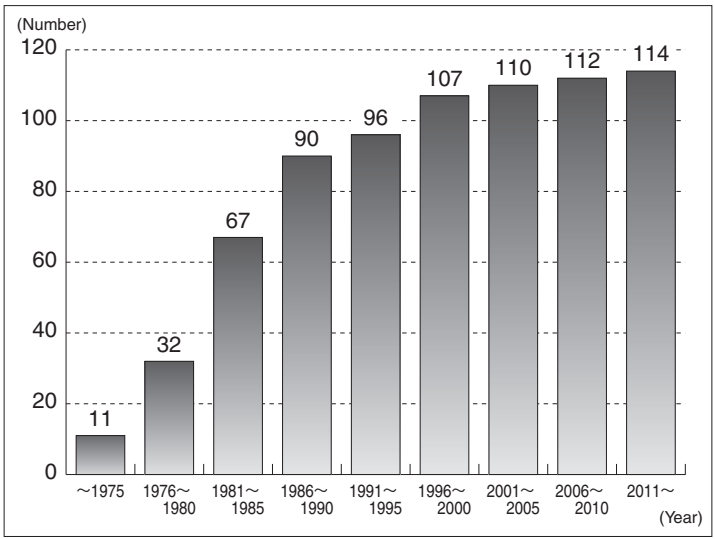
1. Sports Centers for People with Disabilities

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. As of 2013, there were 114 of these facilities located throughout Japan. Of these sports centers, 96.5% are equipped with a gymnasium, 41.2% with a training room, 39.5% with a swimming pool, 22.8% with a playground, 17.5% with an archery range, 15.8% with a table tennis room and 9.6% with a tennis court.

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.

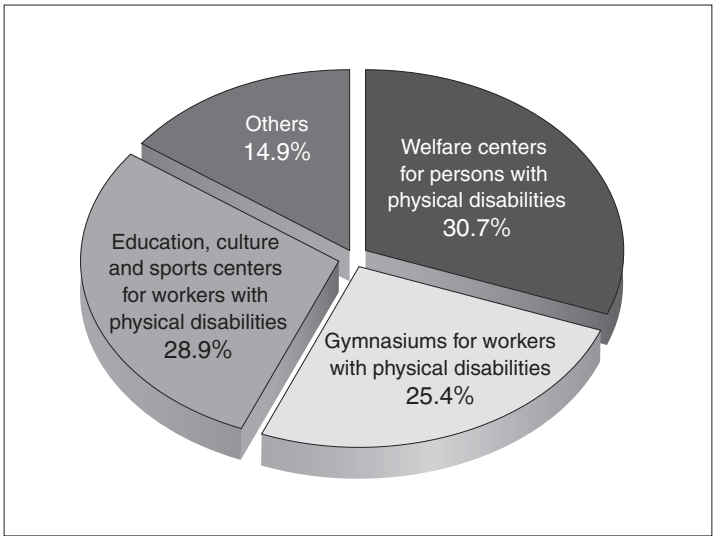
Regarding the management system of these facilities, 83.3% of the centers are managed by designated managers, 15.8% are managed directly by the local government and 0.9% are managed by the central government. Of those 95 facilities with designated managers, 67.4% are managed by Social Welfare Council, Social Welfare Corporation or Rehabilitation Corporation; 9.5% are managed by Sports Association or Sports Promotion Foundation; 7.4% by sports association for the disabled; and 5.3% by private companies.

About half of the sports centers for people with disabilities were built in the 1980s, and only a few centers have been constructed after 1980s (Figure 4-2). Based on the background purposes for their establishment, sports centers for people with disabilities can be divided into the following four types (Figure 4-3):



SSF Survey on Sports Facilities for People with Disabilities (2013)

Figure 4-2 Trends in the Number of Sports Centers for People with Disabilities



SSF Survey on Sports Facilities for People with Disabilities (2013)

Figure 4-3 Categories of Sports Centers for People with Disabilities Based on the Purpose of their Establishment

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. Others
Facilities that have been established by prefectures or ordinance-designated cities for purposes other than those listed above (1 to 3).



Chapter 5

Human Resources for Sports

I. Professions in Sports

1. Human Resources in Local Sports Administration

Sports administration in prefectures and municipalities is mainly 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. 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.

According to the “Survey on Local Sports Policies” (2013) of Ministry of Education, Culture, Sports, Science and Technology (MEXT), there was a total number of 1,209 staff members in sports related departments in 47 prefectures. Looking at their speciality in sports, 18.3% of staff members were in charge of “lifelong sports”, 30.7% were “high performance sports”, 17.0% were “school physical education” and 34.0% were “others (facility management, etc.)”. Moreover, there was a total number of 6,289 staff members in sports departments in 1,397 municipalities. The municipal departments were composed of 41.7% of them in charge of “lifelong sports”, 16.9% were “high performance sports”, 14.1% were “school physical education” and 27.3% were “others (facility management, etc.)” (Figure 5-1). These results showed that the proportion of staff members involved in “lifelong sports” tends to increase as the population size of the municipalities decreases. 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.

2. Human Resources in Sports Organizations

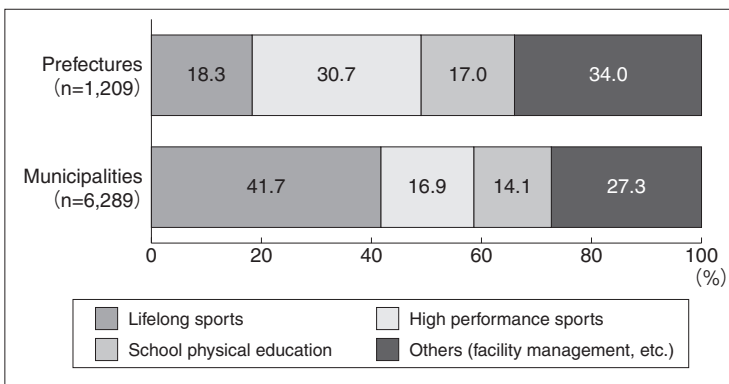
There are various sports organizations throughout Japan. With a few exceptions, the national governing bodies of sports (NGBs) serve as

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” (2013) were examined. The subjects of the survey were 91 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, temporarily assigned workers (from other companies, etc.), agency workers, part-time workers, interns and others. The total number of staff members in the 71 organizations that responded to the survey was 3,681 people. Of this number, 1,428 were directors (including auditors), 1,476 were councilors and 777 were operating staff members (Table 5-1).

The average number of operating staff members (excluding directors and councilors) was 10.9 persons per organization. However, this number varied depending on the organization. For example, some organizations had no operating staff members, while another had 160. With regard to those organizations that had no operating staff members (7 organizations), it is assumed that the directors worked in various positions.



Survey on Local Sports Policies (MEXT, 2013)

Figure 5-1 Composition of the Departments in Charge of Sports Administration in Prefectures and Municipalities

By gender, the proportion of men working as operating staff members was higher, accounting for 58.0% of the total while women made up the remaining 42.0%. Looking at the employment status of those operating staff, excluding directors and councilors, 60.7% were regular employees, 34.4% were non-regular employees (such as contract/commissioned workers, agency workers and part-time workers) and 4.5% were temporarily assigned workers from other companies.

The average number of directors was 20.1 persons per organization, and 9.5% of these were full-time directors. By gender, male directors accounted for 92.6% of the total and female directors accounted for 7.4%, showing that female directors were less than 10%. Among the respondents, 22 organizations (31.0%) did not have any female directors present, and those that had two or fewer female directors accounted for 85% 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

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

Position	Men	Women	Total
Director (full-time)	109	12	121
Director (part-time)	1,069	84	1,153
Auditor	144	10	154
Councilor	1,380	96	1,476
Full-time employee	284	188	472
Contract/commissioned worker	103	55	158
Temporarily assigned worker	31	4	35
Agency worker	3	42	45
Part-time worker	27	37	64
Intern	0	0	0
Others	3	0	3
Total	3,153	528	3,681

Note: The results show the total number of workers are in 71 affiliated organizations of JASA, JOC or and JWGA that responded to the survey.

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 121,227 people), followed by “sporting goods retailers” (82,300 people), “fitness centers” (73,664 people) and “sports and health classes” (65,863 people) (Table 5-2). When all of the workers in these 14 industries were combined, the total number was 494,863 people. However, this is in fact accounting for only 0.9% of the total number of employees in all Japanese industries (55.83 million people in total) in 2012.

Compared to the results obtained in 2009, the number of employees in 2012 had decreased in almost all sports industries. This decrease was particularly high in “gymnasiums” and “facilities for public gambling sports (horse race, bicycle race, motorboat race and motorcycle race)”.

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)” (2010 and 2013) conducted by MEXT. The total number of students in departments that were exclusively devoted to physical education and sports - “School

Table 5-2 Number of Employees in Sports Industries

		Number of Employees		Increased/Decreased Number (%)
		2009	2012	
Sporting and athletic goods manufacturers		19,663	17,188	-2,475 (-12.6)
Sporting goods distributors		—	16,146	
Sporting goods retailers		94,013	82,300	-11,713 (-12.5)
Sports and hobby goods rental outlets		3,149	4,369	1,220 (38.7)
Facilities for public gambling sports (horse race, bicycle race, motorboat race and motorcycle race)		32,572	21,795	-10,777 (-33.1)
Sports facilities	Gymnasiums	10,210	5,555	-4,655 (-45.6)
	Golf courses	147,431	121,227	-26,204 (-17.8)
	Golf ranges	31,324	31,235	-89 (-0.3)
	Bowling alleys	12,592	13,303	711 (5.6)
	Tennis clubs	3,097	2,985	-112 (-3.6)
	Batting tennis centers	3,816	2,954	-862 (-22.6)
	Fitness centers	73,981	73,664	-317 (-0.4)
	Sports facilities (other than those above)	35,948	35,415	-533 (-1.5)
	Sports facilities (that cannot be otherwise classified)	—	864	
Sports and health classes		68,907	65,863	-3,044 (-4.4)

of Physical Education”, “School of Health and Physical Education”, “Faculty of Sports and Health Science”, “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 36,754 in 2010 and 41,317 in 2013 (Table 5-3).

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 1,167 in 2010 to 1,288 in 2013.



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

Department Name	2010			2013		
	Universities	Students	Faculty Members	Universities	Students	Faculty Members
Faculty of Sports and Health Science	2	1,293	54	2	1,654	54
School of Physical Education	12	24,202	691	12	23,051	686
School of Health and Physical Education	1	1,039	—	1	1,039	—
Faculty of Culture and Sports Policies	1	850	37	1	1,146	39
Faculty of Sports and Health Studies	5	3,118	140	7	5,339	173
Department of Sports Science	2	3,200	125	3	4,777	167
School of Health and Sports Science		established in 2011		1	558	17
School of Childhood Sport Education		established in 2013		1	211	21
Department of Sports	2	2,420	78	2	2,380	81
School of Lifelong Sports	1	399	21	1	778	29
Department of Sports and Human	1	233	21	1	384	21
Total	27	36,754	1,167	32	41,317	1,288

Schools Basic Survey (MEX.T, 2010 and 2013)

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 15 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 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

Table 5-4 Number of Registered JASA Certified Sports Instructors

Category	Qualification	Number of Registered Instructors	
		2010	2013
Basic Qualifications of Sports Instructors	JASA Sports Basic Leader	184,935	247,824
Qualifications of Instructors for each Competitions	JASA Coach I	90,248	104,309
	JASA Coach II	14,568	14,784
	JASA Coach III	12,263	14,988
	JASA Coach IV	4,589	5,092
	JASA Instructor I	3,803	3,830
	JASA Instructor II	1,649	1,549
Fitness Regime Qualifications	JASA Sports Programmer	4,679	4,759
	JASA Fitness Trainer	770	684
	JASA Junior Instructor	4,801	5,436
Medical Conditioning Qualifications	JASA Athletic Trainer	1,493	2,078
	JASA Sports Doctor	5,295	5,512
	JASA Sports Dietician	35	127
Sports Management Qualifications	JASA Assistant Club Manager	2,208	5,096
	JASA Club Manager	168	326
Former Qualifications	Sports Trainer I	72	55
	Sports Trainer II	156	128
Total (excluding sports leaders)		146,797	168,753
Total (including sports leaders)		331,732	416,577

as of October 1, 2013

Note: With regard to the Sports Leader qualification, the number registered in FY2013 shows a significant increase. This is because the calculation method was reviewed and now a total number of registered instructors over the years is calculated.

JASA (2010 and 2013)

qualification to teach children about physical fitness and motion facilitation through play at local sports clubs.

The “Medical Conditioning Qualifications” include the following three 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; and “JASA Sports Dietician” to provide nutritional guidance to athletes and enhance their athletic performance.

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.

Obtaining Qualification

With a few exceptions, anyone who is over 18 years old can undertake courses to obtain a qualification. The curriculum is divided into two areas: “General Subjects” that involves topics necessary for all sports instructors; and “Specialized Subjects” that varies depending on the characteristics of each qualification. Courses are offered both in a classroom environment and/or distance learning. For “Qualifications of Instructors for per Competition”, students are provided with practical training and demonstrations in the specialized subjects. After completing the course, students will take a final test that they must pass before JASA certifies them with a qualification. In order to make the qualification official, it must be registered with JASA along with the specified registration fee. Once the qualification has been registered, it is valid for four years and they are required to participate in seminars designated by JASA or the relevant NGBs to renew the qualification.

With the aim of developing more certified sports instructors, JASA has been working in collaboration with various educational institutions including universities and technical colleges. By acknowledging the

curriculum of sports departments of universities or sports colleagues that are equivalent to JASA's instructor training curriculum as "Accredited School for JASA Sports Instructor Training", JASA can accept credit transfers from those accredited schools. This allows students to be partially or entirely exempted from taking further seminars or tests to obtain those sports instructor qualifications.

Number of Registered Instructors

As of October 2013, there were 416,577 qualified instructors registered with JASA (Table 5-4). The number of those registered 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 2013 increased by about 22,000 people, when compared to that number in 2010.

By sports, the number of registered instructors was highest for "football" (32,386), followed by "swimming" (19,729), "volleyball" (14,666) and "softball" (13,449) (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 four 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	
	2010	2013
Football	30,393	32,386
Swimming	19,971	19,729
Volleyball	11,260	14,666
Softball	11,572	13,449
Basketball	4,411	6,350
Tennis	5,285	5,429
Ski	5,665	4,850
Kyudo (Japanese Archery)	2,408	4,214
Karate	3,593	4,084
Table tennis	3,138	3,466
	§	
Total	127,222	144,552

as of October 1, 2013

JASA (2010 and 2013)

Table 5-6 JPSA Certified Sports Instructor Qualifications

Category	Number of Registered Instructors
Beginner's Para-Sports Instructor	17,965
Intermediate Para-Sports Instructor	2,502
Advanced Para-Sports Instructor	686
Sports Coach	125
Para-Sports Physician	234
Para-Sports Trainer	75

as of August 31, 2013

Note: Sports coaches include those certified as Advanced and Intermediate Para-Sports Instructors.

JPSA (2013)

Chapter 6

Sports Clubs

I. Sports Club Memberships for Adults

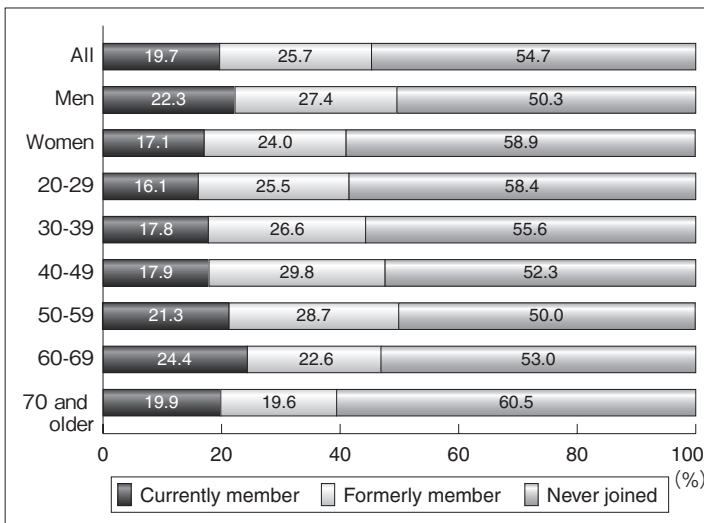
1. Membership Trends and Types of Sports Clubs

Membership Trends

According to “The 2012 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 19.7% (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 22.3%, which was 5.2 percentage points higher than that of women (17.1%). Conversely, in terms of those who were not enrolled in any sports clubs, the proportion of women was 8.6 percentage points higher (58.9%) than that of men (50.3%).

By age groups, the over-60 age group showed the highest membership rate of 24.4%, indicating that one in every four individuals are currently



SSF National Sports-Life Survey (2012)

Figure 6-1 Membership of Sports Clubs

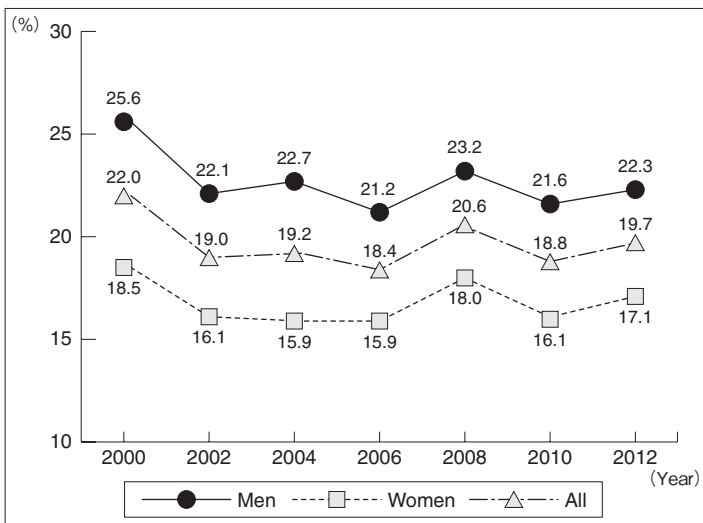
enrolled in a sports club. In terms of those who were not enrolled in any sports clubs, non-membership rates among the over-70s age group (60.5%) as well as the 20s age group (58.4%) were higher than other age groups.

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 12 years. The proportion of adults who were enrolled in a sports club remained at around 20% from 2002 to 2012.

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 49.5%, followed by “private sports clubs / fitness clubs”, “workplace clubs” and “alumni clubs”.

By gender, the proportion of women who were members of “community sports clubs” was 11.8 percentage points higher (56.1%) than men (44.3%). The same trend was observed in “private sports clubs”, with women (32.4%) leading men (15.4%) by 17.0 percentage points. By age groups, the proportion of the 20s age group who were enrolled in “private sports clubs” was 15.2%. This percentage increased as they get older, and reached the highest in the 50s age group (29.6%). The proportion of respondents who were enrolled in “community sports clubs” also increased as the age group increased, and exceeded 80% in the over-70 age group, clearly showing that community sports clubs played an important role for



SSF National Sports-Life Survey (2012)

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

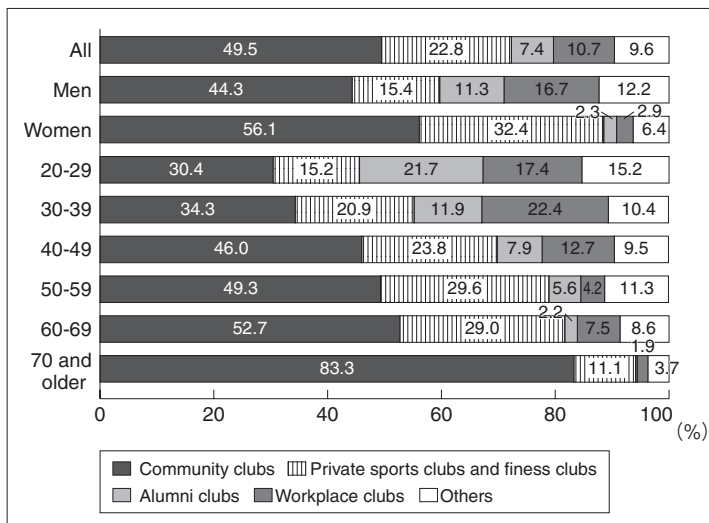
seniors to participate in sports.

When the annual trends of membership rate were analyzed by types of sports club, the “community sports clubs” had the highest membership rates (at around 50%), followed by “private sports clubs / fitness clubs” (at around 20%), “workplace clubs” (at around 10%) and “others.” A slight increase was observed in the “others” category, but generally the membership rates did not have a significant change over the past 10 years.

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 22.5%. This number was 10.1 percentage points lower than the rate (32.6%) reported in the previous survey (2010). By gender, the proportion wanting to enroll in a sports club was higher in women, and by age the 30s and 40s age groups were the highest.

2. Sports and Physical Activities in Sports Clubs

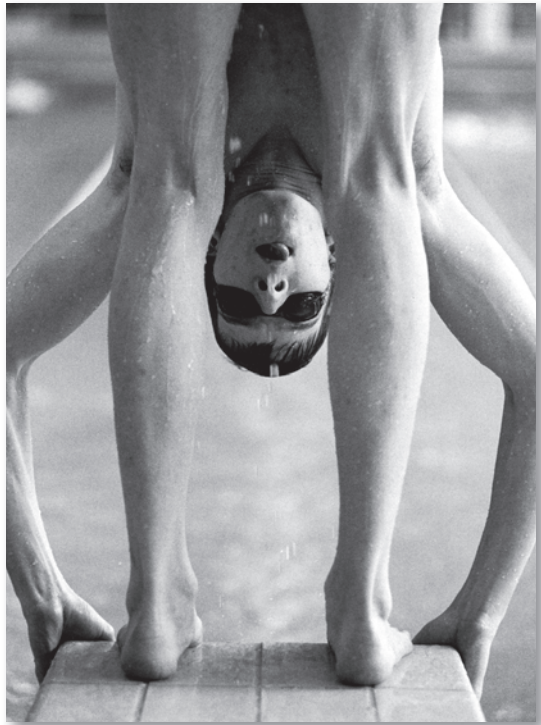
According to the “Public Opinion Poll on Physical Fitness and Sports” (2013) conducted by MEXT, sports and physical activities performed in sports clubs include “calisthenics (including radio exercises, workplace exercises, aerobics and jumping rope)”, which were the most popular type of activity at 20.2%, followed by “tennis, soft tennis, badminton and table tennis, including wheelchair tennis” at 18.6%, “walking (including community walking events and strolling)” at 12.7%, “baseball or softball” at 11.1% and “golf” at 10.7%.



SSF National Sports-Life Survey (2012)

Figure 6-3 Types of Sports Clubs

By gender, “baseball or softball” ranked as the most played sports for men at 18.2%, followed by “golf” at 17.6%, “tennis, soft tennis, badminton and table tennis, including wheelchair tennis” at 17.1%, “walking (including community walking events and strolling)” at 12.9% and “football or futsal, (including blind football)” at 11.8%. Meanwhile, women ranked “calisthenics (including radio exercises, workplace exercises, shape-up exercises, aerobics and jumping rope)” as the most enjoyed activity at 36.5%, followed by “tennis, soft tennis, badminton and table tennis, including wheelchair tennis” at 20.4%, “dance (including folk dancing, jazz dancing, ballroom dancing, traditional dancing and wheelchair dancing)” at 16.1% and “walking (including community walking events and strolling)” at 12.4%.



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

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

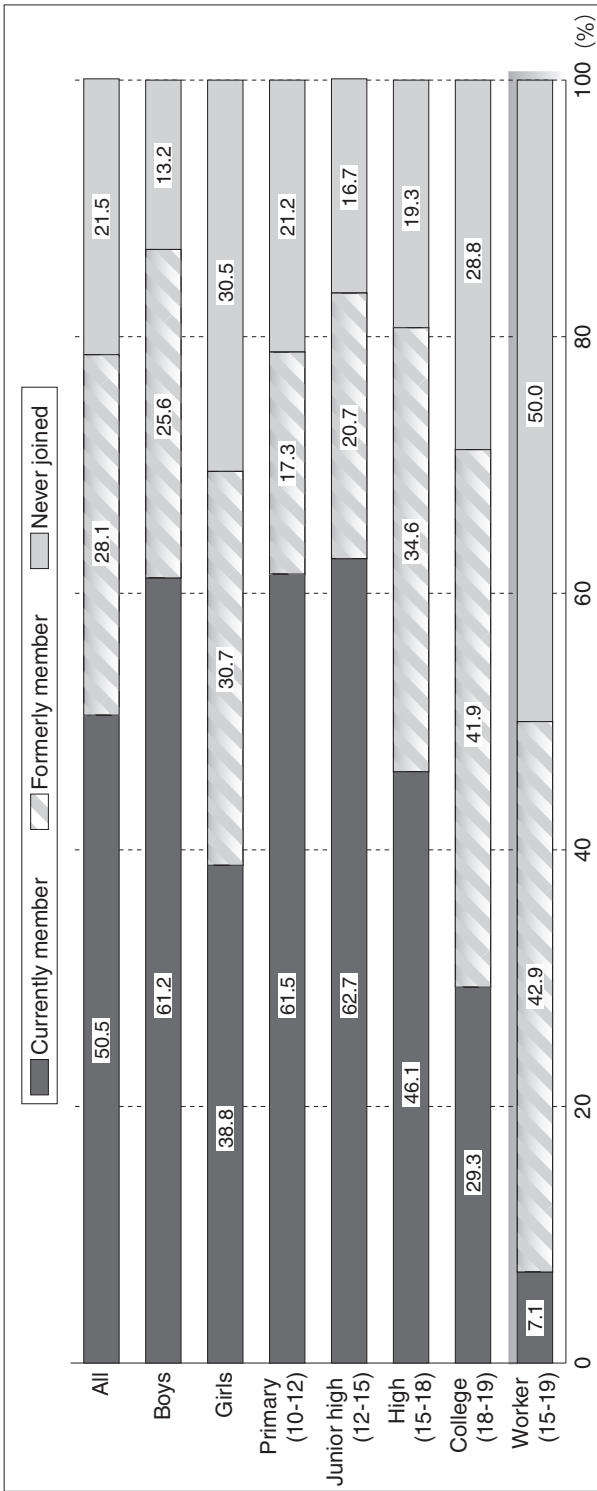
According to “The 2013 SSF National Sports-Life Survey of Young People”, 50.5% of young people aged 10-19 years were members of sports clubs (in school sports clubs, community sports clubs such as junior sports clubs, and private sports clubs such as swimming and gymnastic clubs) in 2013 (Figure 6-4).

Moreover, the survey found that 28.1% of the respondents were former members of sports clubs, and 21.5% had never been a member of any sports club. This results showed a similar trend to that of the survey in 2009 where 49.3% were current members, 31.3% were former members and 19.4% had never been members. When calculated with the total population of young people in Japan (11,920,393 people, according to the basic resident register as of March 31, 2012), the number of young people who were sports club members were around 6.02 million people.

By gender, boys accounted for 61.2% of sports club members, while girls accounted for 38.8%. By school year, the highest membership rate (61.5%) was found in primary school years. The membership rate continued to be around 60% in primary and junior high school years, but decreased to around 40% 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 sports clubs. Moreover, the membership rate in young workers (aged 15-19 years) was significantly low, at 7.1%.

By type of sports clubs, “junior high or high school sports clubs” ranked the highest at 54.7%, followed by “community sports clubs (junior sports clubs, local sports classes, dojo, etc.)” at 19.0% and “private sports clubs (swimming clubs, gymnastic clubs, etc.)” at 16.6% (Figure 6-5).

The survey also examined the presence of sports instructors for the top ten sports and physical activities that were “frequently performed” by respondents. The percentage of those who responded that they had instructors was 54.3%, which indicates that about half of young people aged 10-19 years in Japan play sports and physical activities under the instruction of them. Moreover, when the results were analyzed by sports, the sports that had the highest likelihood of having instructors was “soft tennis” at 85.4%, followed by “baseball” at 80.6%, “volleyball” at 78.0%, “table tennis” at 76.3%, “basketball” at 67.4%, “football” at 62.9%, “badminton” at 55.3%, “jogging or running” at 21.1% and “dodgeball” at 10.9%. With regard to more competitive sports, over 80% of the respondents played “soft tennis”



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

Figure 6-4 Membership in Sports Clubs among Young People Aged 10-19 years (2013)

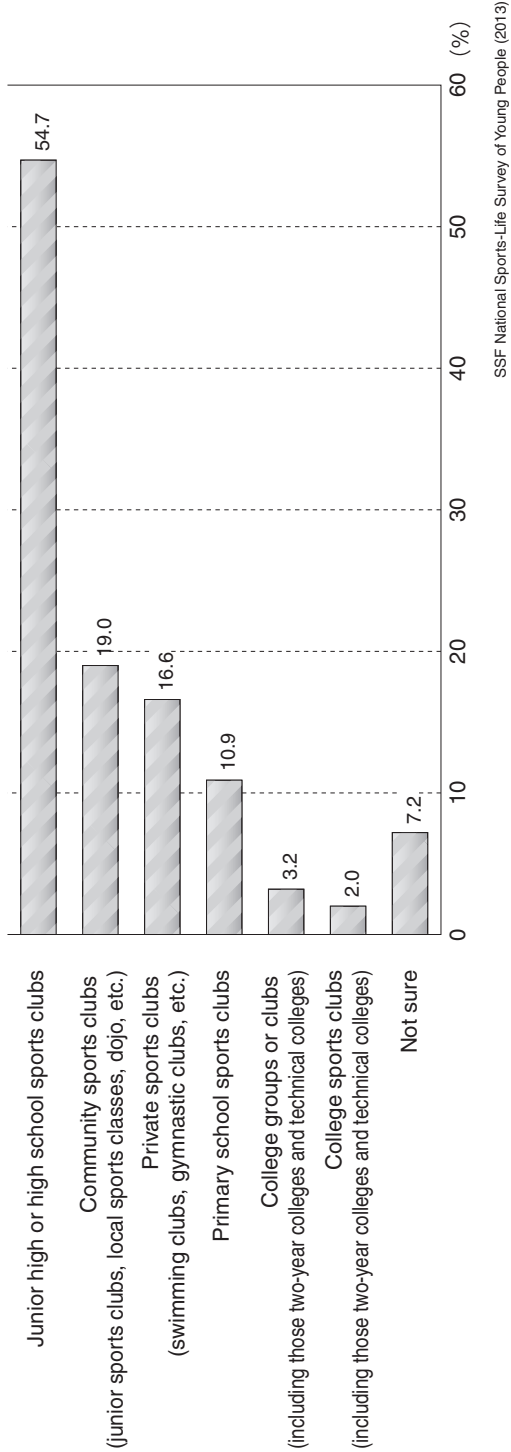


Figure 6-5 Types of Sports Clubs and School Sports Club for Young People Aged 10-19 years (Multiple Answers)

and “baseball” in the presence of instructors. However, “football” and “badminton” were only around 60%.

2. 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 66 - 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 2013 were examined by sports, “football” had the largest number with 253,517 students (a registration rate of 18.1%), followed by “soft baseball” with 242,290 students (17.3%), “soft tennis” with 174,435 students (12.5%), “basketball” and “table tennis”. In 2008, soft baseball was the sport that had the largest number of students registered (over 20%). However, this number decreased to 17.3% in 2013 (a decrease of 4.1 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 197,227 students (a registration rate of 20.9%), followed by “volleyball” with 159,990 students (16.9%), “basketball” with 140,227 students (14.9%), “track and field” and “table tennis.”

3. 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 13% in the last ten years. On the other hand, the enrollment rate in school sports clubs has increased by 4.4 percentage points, from 37.4% in 2003 to 41.8% in 2013.

Table 6-1 shows the number of students registered with JHAF in 2008 and 2013 by sports. In 2013, “football” had the largest number with 158,199 registered students (accounting for 20.4% of the total). This was followed by sports such as “basketball” with 92,623 students (11.9%), “track and field” with 69,385 students (8.9%), “tennis” and “badminton”. For girls, “basketball” had the largest number with 60,215 registered students (13.9%), followed by “volleyball” with 56,055 students (12.9%), “badminton” with 54,591 students (12.6%), “track and field” and “tennis.”

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

Rank	Boys				
	Sports	2013		2008	
		Number of students	(%)	Number of students	(%)
1	Football	158,199	20.4	145,291	19.3
2	Basketball	92,623	11.9	88,007	11.7
3	Track and Field	69,385	8.9	58,344	7.8
4	Tennis	66,647	8.6	66,418	8.8
5	Badminton	50,762	6.5	43,736	5.8
6	Table Tennis	48,407	6.2	51,932	6.9
7	Soft Tennis	46,615	6.0	47,656	6.3
8	Volleyball	35,597	4.6	41,252	5.5
9	Kyudo (Japanese archery)	33,629	4.3	32,213	4.3
10	Kendo	30,153	3.9	33,492	4.5

Rank	Girls				
	Sports	2013		2008	
		Number of students	(%)	Number of students	(%)
1	Basketball	60,215	13.9	62,982	14.1
2	Volleyball	56,055	12.9	67,071	15.0
3	Badminton	54,591	12.6	51,738	11.6
4	Track and Field	37,346	8.6	34,465	7.7
5	Tennis	36,474	8.4	38,283	8.6
6	Soft Tennis	34,587	8.0	39,641	8.9
7	Kyudo (Japanese archery)	32,989	7.6	31,790	7.1
8	Softball	22,716	5.2	25,620	5.7
9	Table Tennis	19,466	4.5	18,042	4.0
10	Kendo	16,424	3.8	16,281	3.6

Note: The rankings are the results from 2013 survey.

All Japan High School Athletic Federation (2008, 2013)

III. Private Fitness Clubs

1. Trends in Private Fitness Clubs

Market Size

As of the end of December 2012, the market size (in sales) of private fitness clubs was 412.4 billion yen (a 0.7% increase from the previous year) (Table 6-2). Until 2009, the market for private fitness clubs remained low as if synchronized with the slow economy. However, 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 2010 and these clubs were significantly dominated by the small-scale gyms. In 2010, 155 small-scale gyms were opened, followed by 23 studio/single item facilities and 22 general fitness clubs. In 2011, 159 small-scale gyms were opened, followed by 21 studio/single item facilities and 12 general fitness clubs. In 2012, 156 small-scale gyms were opened, followed by 36 studio/single item facilities and 20 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.

Table 6-2 Market Trend of Private Fitness Club Industry

	2008	2009	2010	2011	2012
Sales (in millions of yen)	4,157	4,087	4,142	4,095	4,124
Growth rate** (%)	▲1.5	▲1.7	1.3	▲1.1	0.7

** Changes in sales compared to the previous year. The growth rate in 2008 is based on the sales reached in 2007 (422 billion yen).

Note 1: Estimated by the editorial departments of "Fitness Business" and from the MEXT "Current Survey on Selected Service Industries"

Note 2: The sales above 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.

The number of facilities closing down has also leveled out, at around 20 stores per year. As of the end of December 2012, the total number of fitness clubs operating throughout Japan was 3,945 (a 5.3% increase from the previous year) (Table 6-3). By location, Tokyo had the highest number of fitness clubs (43 facilities), followed by Kanagawa (22 facilities) and Osaka (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 from 2011 to 2012, and also in the four years since 2008, it reached the 4 million mark (Table 6-4). As of the end of December 2012, the total number of members was 4.03 million (an increase by 2.5% from the previous year), accounting for 3.16% of the total population of Japan. The price of membership fee has exhibited a decreasing trend while the number of users has shown an increasing trend. This is primarily due to the launch of different types of clubs offering lower membership fees, as well as smaller-scale fitness clubs.

Table 6-3 Number of Private Fitness Clubs Facilities

	2008	2009	2010	2011	2012
Number of facilities	3,269	3,388	3,574	3,745	3,945
Growth rate** (%)	7.5	3.6	5.4	4.8	5.3

** Changes in facilities compared to the previous year. The growth rate in 2008 is based on the number of facilities in 2007.

Editorial departments of "Fitness Business" (2013)

Table 6-4 Membership and Number of Users in Private Fitness Clubs (2013)

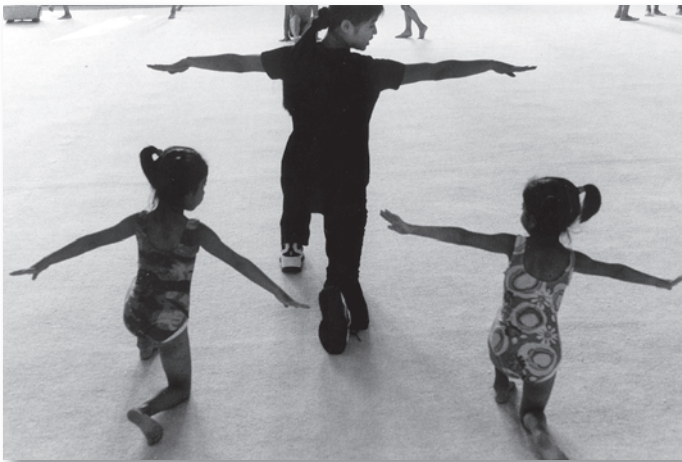
	2008	2009	2010	2011	2012
Membership	4,009,082	3,952,970	3,988,164	3,927,229	4,025,410
Membership penetration rate (%)	3.14	3.10	3.17	3.07	3.16
Total number of users (in ten thousand)	28,665	27,631	28,236	27,726	30,633
Number of users per facilities	87,687	81,556	79,004	74,035	77,434
Frequency of use per year	71.5	69.9	70.8	70.6	76.1

All Japan High School Athletic Federation (2008, 2013)

Additionally, the annual usage per facility, which had remained at around 70 times per year until 2011, increased to 76 times per year in 2012. This increase may have been the result of senior members becoming heavier users, or the effects of the initial strategies used by each fitness club to attract and hold customers. Nonetheless, there is no doubt that this is an exciting news in the fitness industry, and the rate of membership withdrawal has been decreasing every year.

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”, “Anytime Fitness” and “Zexis”) has become more prominent.



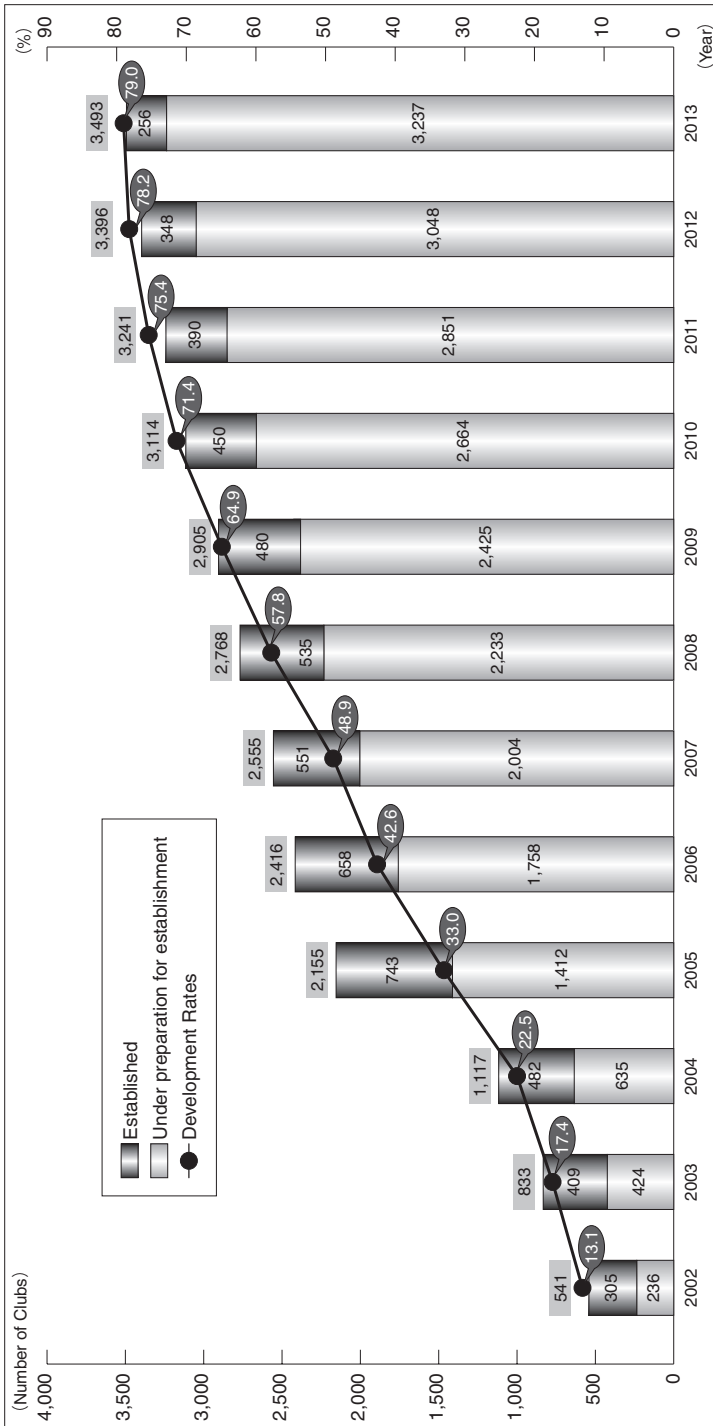
IV. Comprehensive Community Sports Clubs

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 MEXT’s “Survey on the Development of Comprehensive Community Sports Clubs”(2013), the number of comprehensive clubs has increased by six times over the 10 years since the beginning of the survey in 2002 (Figure 6-6). 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 5-8% when compared to the previous year. However, in 2013 the increase rate was even lower, growing by only 2.9% from the previous year. The total number of comprehensive clubs was 3,493, of which 3,237 clubs were already operational (including 32 clubs now currently inactive) and 256 clubs were in the process of establishment.

The Sport Basic Plan sets out policy goals that aim to continuously develop at least one comprehensive club in each municipality, taking into account the issues experienced by communities such as de-population and aging. This policy aims that comprehensive clubs to play a major role in establishing the “New Public Commons”, and also serve as a hub club to bring the community together. Additionally, by aiming for more autonomous management of comprehensive clubs, the Sport Basic Plan specifies the development of a hub club in every regional municipality (around 300 municipalities nationwide), which will be able to support other local sports clubs with their club management or provision of sports instruction.



MEXT (2002 - 2013)

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

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

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 the MEXT's "Survey on Comprehensive Community Sports Clubs", which has been conducted since 2003.

Number of Members

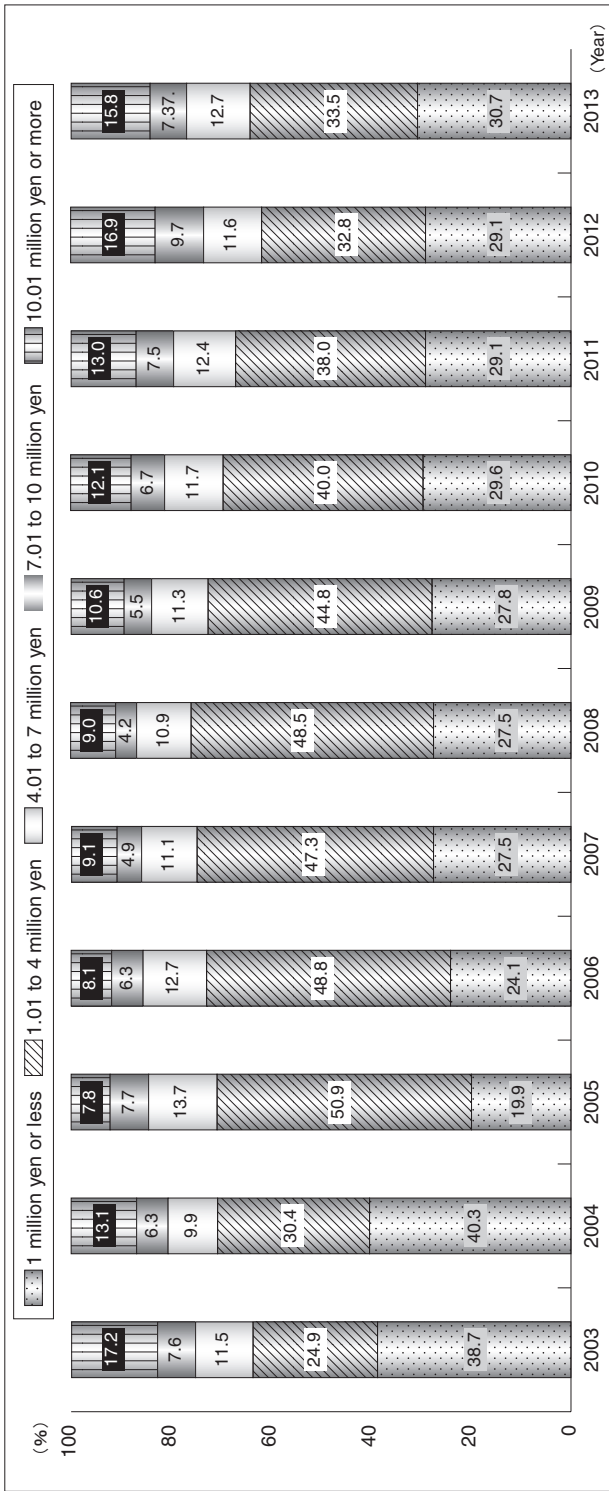
Looking at the number of the comprehensive club members and the changes observed over the years, the most prevalent size for a comprehensive club was 101 to 300 members, accounting for almost 40% of the total since 2005. Those with 300 or fewer members have shown an increasing trend, whereas a decreasing trend was seen in comprehensive clubs with 301 to 1,000 members. 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. 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 more than 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. However, the survey conducted in 2013 recorded the highest percentage in that category 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 4.01 million or more increased instead (Figure 6-7). Also, looking at the internal revenue rate (based on the ratio of membership fees, operating costs and consignment costs compared to revenue) more than half of the comprehensive clubs (53.6%) had a 50% or lower internal revenue rate in 2013, and in fact this trend has continued since 2005. 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, 2003 — 2012)

Figure 6-7 Trends in the Budgets of Comprehensive Community Sports Clubs

3. New Initiatives for Comprehensive Community Sports Clubs

MEXT has set out the following policies in the “Strategy for Sports Nation” (2010): deploying outstanding instructors such as retired top athletes at comprehensive clubs in every regional municipality (300 municipalities nationwide) that should serve as a hub for the creation of a virtuous cycle of competitive sports and community sports.; and increasing the pool of sports personnel in local communities for physical education and sports club activities at schools for the establishment of a closer link between schools and the local communities. Upon the establishment of these policies, a budget of 570 million yen from the “Special Fiscal Framework to Revitalize Japan” was used to carry out the “Sports Community Development Project.” Under the project, 50 comprehensive clubs in 49 municipalities of 29 prefectures implemented “Lecture Tour by High Performance Athletes”, “Initiatives Towards Resolving Community Issues”, and “Support for Physical Activities in Primary Schools”.

The basic principles of the “Strategy for Sports Nation” are also enshrined in the Sport Basic Plan, with a further emphasis on the need for developing hub clubs which will play a major role in supporting other comprehensive clubs in the community, in terms of management or any consultative advice with the goal of developing more autonomous management among those comprehensive clubs. Since 2012, “Sports Community Development Project” began its implementation as the “Project on a creation of a virtuous cycle of competitive sports and community sports”. A budget of 580 million yen was distributed to 46 comprehensive clubs in 44 municipalities (30 prefectures). In existing hub clubs as well as in local sports clubs, several sports personnel have begun an active contribution to develop a virtuous cycle between competitive sports and community sports through the following initiatives:

- “Support for Junior Athletes by High Performance Athletes”
Utilizing top athletes to provide instruction to junior athletes at a hub club, and assistance or cooperation for projects to resolve local community issues and improve physical education in primary schools when required.
- “Measures to Resolve Local Community Issues”
Carrying out liaisons and coordination to deploy high performance athletes and specialists to physical education classes in primary schools, as well as planning and implementing measures to contribute to improving physical fitness and childcare support through participation in sports by local residents in order to establish the “New public commons” through sports.

- “Deploying Elementary School Physical Education Activity Coordinators”

Providing support for the physical education instruction in primary schools by deploying personnel who are qualified as “Elementary School Physical Education Activity Coordinators”. These coordinators can assist in the planning of the physical education program at primary schools, as well as co-teaching physical education with a homeroom teacher, and offer support to build a relationship between schools and local communities.

In 2013, 61 comprehensive clubs in 58 municipalities (36 prefectures) were qualified for the project, which was the highest number to be involved since the project started. Table 6-6 shows the results of the project. When the number of comprehensive clubs participating in the project and the project results were analyzed, a steady growth was seen in the number of clubs, but the FY2013 budget showed an increase of only around 7 million yen from the previous year. On the other hand, 41 clubs have been serving as a hub club since the beginning of the project. Those clubs that have undertaken the projects for the past three consecutive years are required to become independent in terms of financial support from the MEXT in their implementation of the project from the following year. Therefore, it is imperative that they secure financial resources in order to continually implement the project with their experiences gained through the projects and the personal connections that they have built over the years.

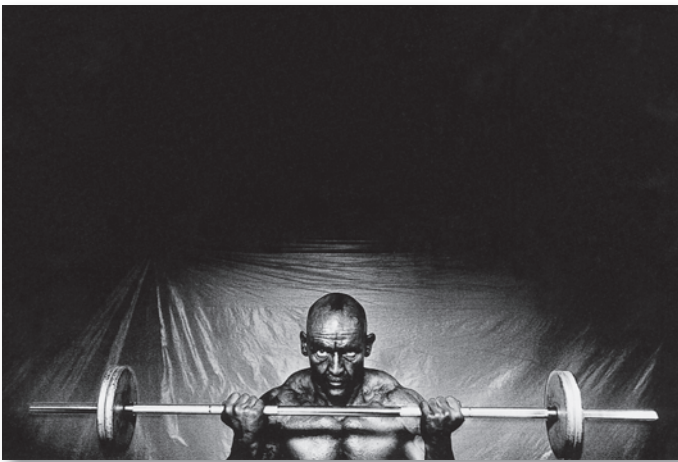


Table 6-5 Results of the Project on a Creation of a Virtuous Cycle of Competitive Sports and Community Sports

Content	Category	FY2011 (Estimated budget: 570,933,000 yen)	FY2012 (Estimated budget: 581,598,000 yen)	FY2013 (Estimated budget: 588,866,000 yen)	
Deploying high performance athletes	Number of organizations	278	319	479	
	Number of athletes	Olympic Games	22	33	46
		International competitions	38	42	53
		National competitions	98	113	213
		Others	39	48	91
		Total	197	236	403
Resolving Local Community Issues	Number of projects implemented	116	106	163	
Support for Primary School Physical Education Activities	Number of primary schools sent to	425	580	558	
	Number of coordinators	403	492	585	

Note 3 : "Others" in the "Deploying high performance Athletes" category refers to those who have previously competed in J. League matches, overseas professional football, JFL, Women's football League, F. League, professional baseball, V. League, JBL or the Badminton Nippon League.

Figures

1-1	Sports Administration Structure in Japan	5
2-1	Rates of Participation in Sports and Physical Activities over the years	16
2-2	Rates of Participation in Sports or Art Activities (By Type of Disability and By Age)	22
2-3	Rates of Sports Participation for Children Aged 4-9 years	26
2-4	Frequency Levels of Participation for Children Aged 4-9 years (By Gender and By School Year)	26
2-5	Rates of Sports Participation for Young People Aged 10-19 years	30
2-6	Rates of Sports Participation for Young People Aged 10-19 years (By Gender and By School Year)	31
2-7	Rates of Adults Spectating Live Sports Events	35
2-8	Rates of Adults Spectating Live Sports Events (By Gender and By Age)	36
2-9	Rates of Volunteering in Sports among Adults (By Gender)	41
2-10	Rates of Volunteering in Sports among Adults (By Age Group)	42
2-11	Rates of Volunteering in Sports among Young People Aged 10-19 years (By Gender)	44
3-1	Trends in the Sports Budget of MEXT	48
3-2	Sports Budget in Prefectures (2012)	50
3-3	Sports Budget in Municipalities (2012)	50
3-4	Sports Promotion Lottery System and Allocation of Sales Revenue (2013)	53
3-5	Distribution of Revenue Size (Budgets) for National Governing Bodies of Sports	63
3-6	Breakdown and Trends in Sports Budget of MEXT	65
3-7	Flow of Funds related to Enhancement of High Performance Sports	68
4-1	Number of Public and Private Sports Facilities in Japan	70
4-2	Trends in the Number of Sports Centers for People with Disabilities	85
4-3	Categories of Sports Centers for People with Disabilities Based on the Purpose of their Establishment	85

5-1	Composition of the Departments in Charge of Sports Administration in Prefectures and Municipalities	88
6-1	Membership of Sports Clubs	98
6-2	Trends in the Rate of Sports Club Memberships	99
6-3	Types of Sports Clubs	100
6-4	Membership in Sports Clubs among Young People Aged 10-19 years (2013)	103
6-5	Types of Sports Clubs and School Sports Clubs for Young People Aged 10-19 years (Multiple Answers)	104
6-6	Changes in the Number of Comprehensive Community Sports Clubs and the Development Rate (Nationwide)	111
6-7	Trends in the Budgets of Comprehensive Community Sports Clubs	113

Tables

2-1	Levels of Participation in Sports and Physical Activities	15
2-2	Rates of Participation in Sports and Physical Activities over the years (By Gender)	18
2-3	Rates of Participation in Sports and Physical Activities over the years (By Age)	19
2-4	Rates of Participation in Sports and Physical Activities over the years (By Types of Sports)	21
2-5	Number of Registered Players and Estimated Participants	24
2-6	Categories of Participation in Sports and Physical Activities for Children Aged 4-9 years	25
2-7	Ranking of Participation in Sports and Physical Activities by Children Aged 4-9 years (At Least Once a Year)	27
2-8	Ranking of Participation in Sports and Physical Activities by Children Aged 4-9 years (Those Who “Often Participated in” By Gender)	28
2-9	Levels of Participation in Sports and Physical Activities by Young People Aged 10-19 years	29
2-10	Ranking of Participation in Sports and Physical Activities by Young People Aged 10-19 years (At Least Once a Year)	33
2-11	Ranking of Participation in Sports and Physical Activities by Young People Aged 10-19 years (Often Participated in)	34
2-12	Popular Spectator Sports (Multiple Answers)	36
2-13	Rates of Sports Viewing and Sports Participation in Adults (2012)	37
2-14	Rates of Sports Viewing and Sports Participation in Young People Aged 10-19 years (2013)	37
2-15	Popular Sports Viewing on TV for Adults (2012)	39
2-16	Popular Sports Viewing on TV for Young People Aged 10-19 years (2013)	40
2-17	Types of Volunteering in Sports (Multiple Answers)	43
2-18	Types of Volunteering in Sports by Young People Aged 10-19 years (Multiple Answers)	45
3-1	Trends in the Physical Fitness Budget	47
3-2	International Comparison of the Sports Budgets	49

3-3	Trends in Sales Proceeds from the Sports Promotion Lottery and Subsidy Amounts	54
3-4	Trends and Breakdown of Sports Promotion Fund Subsidies	56
3-5	Funding for Sports Projects through Revenues from Public Gambling	58
3-6	Revenue and Expenditure of Sports Organizations	60
3-7	Budgets of MEXT and JSC for Policies to Enhance High Performance Sports (2013)	66
4-1	Number of Public Sports Facilities and School Sports Facilities by Facility Types	71
4-2	Major Subsidy Programs for Sports Facility Maintenance	73
4-3	Trends in the Amounts of Subsidies for Public Sports Facility Maintenance from MEXT	74
4-4	Main Facilities of City Parks subjected to the Subsidy	76
4-5	Event-Specific Affiliated National Training Center Facilities	80
5-1	Number of Staff Members in National Governing Bodies of Sports	89
5-2	Number of Employees in Sports Industries	90
5-3	Number of University Students and Faculty Members in Physical Education and Sports Departments	92
5-4	Number of Registered JASA Certified Sports Instructors	94
5-5	Number of Registered JASA Certified Sports Instructors per Sport	97
5-6	JPSA Certified Sports Instructor Qualifications	97
6-1	Number of Students Registered in High School Sports Clubs (Top 10)	106
6-2	Market Trend of Private Fitness Club Industry	107
6-3	Number of Private Fitness Clubs Facilities	108
6-4	Membership and Number of Users in Private Fitness Clubs (2013)	108
6-5	Results of the Project on a Creation of a Virtuous Cycle of Competitive Sports and Community Sports	116

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Page 4: SSF World Sports Photo Contest 1995

Page 32: SSF World Sports Photo Contest 2004

Page 38: SSF World Sports Photo Contest 2004

Page 51: SSF World Sports Photo Contest 1998

Page 59: SSF World Sports Photo Contest 1996

Page 82: The Karuizawa Ice Park

Page 86: SSF World Sports Photo Contest 2002

Page 91: SSF World Sports Photo Contest 1995

Page 101: SSF World Sports Photo Contest 2004

Page 109: SSF World Sports Photo Contest 2004

Page 115: SSF World Sports Photo Contest 2002



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