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SPORT FOR every one

White Paper on Sport in Japan 2023

SASAKAWA SPORTS FOUNDATION

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Foreword

The activities of the Sasakawa Sports Foundation (SSF) are aimed at creating a "Sport for Everyone society" in which everyone enjoys sports in a manner that fits their own lifestyle and interests. Sports not only have the power to maintain and improve mental and physical health, but also the mysterious ability (value) to act as a universal remedy that helps people grow and encourages the formation of society.

The role of the community in people's lives has been shrinking over the years, and kids are growing up with fewer opportunities to interact with those in different age groups. The rapid graying of the population is pushing up health- and nursing-care costs, exacerbating already strained fiscal resources. These are issues confronting not just Japan but also an increasing number of countries around the world.

We at the Sasakawa Sports Foundation (SSF) believe that one way of tackling these issues is to utilize the power of sports to build a healthier, more vibrant, and more inclusive society.

Sports can lead to better physical and mental health and can also be used as a communication tool to bridge differences in age, language, and gender. Our task at the SSF is to help provide an environment where everyone can participate in sports and expand opportunities for interpersonal contact, thereby energizing and invigorating both individuals and communities. Such initiatives can not only encourage greater "self-help" efforts toward better health but also deepen understanding of others, fostering an altruistic desire for "mutual aid" and prompting the government to enhance "public assistance."

And as people's engagement with sports and the community increases, they will experience all three facets of sports: "participate," "spectate," and "volunteer."

To achieve these goals, we undertake research activities to obtain the data needed to develop concrete, effective policy solutions. We then work with individual and organizational partners to implement those policies, actively engaging with the community to gauge their effectiveness and feeding the results back to our research team. The two pillars of our activities thus act as a feedback mechanism, enabling us to develop even better, more practical solutions confronting society.

A key component of this virtuous cycle is World Challenge Day—a day on which communities around the world encourage as many people as possible to be physically active. It provides an opportunity for not

only individual participants to take up physical activity but also the host municipalities to directly engage with local residents and to promote good health and stronger community ties.

It has been thanks to our active involvement in Challenge Day that we have been able to conclude partnership agreements with a number of local governments to jointly develop and implement sports-related initiatives, and we hope to share the best, most successful practices with many more municipalities both in Japan and around the world.

It is our strong hope that our efforts to address social challenges through the power of sports will trigger similar initiatives abroad, and we intend to actively offer our insights to organizations sharing the Sports for All philosophy. At the same time, we seek to incorporate many innovative, promising practices from other countries, working closely with researchers and professionals around the globe to create a better world for all.

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

Kazutoshi Watanabe
President, Sasakawa Sports Foundation
October, 2023

Chief Editor

Kazutoshi Watanabe
President, Sasakawa Sports Foundation

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The Editorial Board made a full contribution in contents editing, writing articles and facilitating authors for the original White Paper on Sport which was published in Japanese in March 2023.

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As of October 2023

Chapter 1
Sport Policy

I. The Acts on Sport

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 sport 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 athletes achieving the great success in international competitions. In addition, the Act identifies sport as a key element in the improvement of the international status of Japan. It states that sport can create vitality in our society, contribute greatly to the development of the national economy, and promote global mutual understanding through international exchange, which will contribute greatly to international peace.

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

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

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

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

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

2. Sports Promotion Lottery Law

In 1998, in order to secure financial resources for sport 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 sport system.

Article 21 of the Act specified how lottery revenue should be used and allocated to local government bodies and sport organizations. The allocation of subsidies from the Sports Promotion Lottery is determined in accordance with the "Basic Policies for Subsidies from the Sports Promotion Lottery Profits" formulated by MEXT. An amount equivalent to 50% of lottery ticket sales is used as prize money for winners, then two thirds of the remaining profit (after deducting management expenses) is used as subsidies for the promotion of sport, while the remaining one third is paid to the national treasury.

In May 2013, the Act on the Sports Promotion Lottery was partially revised to expand the type of football matches that could be bet on (which had previously been limited to the Japan Professional Football League

"J. LEAGUE"). The Act now allows betting on football matches that are held by overseas professional leagues designated by MEXT such as the English Premier League, and the matches which conform to the standards specified by an ordinance of MEXT. A further revision in 2016 raised the percentage of lottery profits that are used as subsidies for local governments and sports organizations to three-eights (3/8) from one-third (1/3).

In the 2020 revision, professional basketball league "B. LEAGUE" was added to the list of applicable sports. The revision also allowed the sale of lottery tickets that predict the result of each match and the winning team of a competition. In September 2022, the "WINNER" lottery was established in which people try to predict the results of each match, and a portion of the lottery profits is used to support clubs and other organizations by improving the environment for players and strengthening club management. Further, this revision expanded the projects that contribute to furbishing equipment that contributes to the safety of people engaged in sports, including air-conditioning systems and lighting, as well as those that contribute to the stability of living in the event of a major disaster, infectious disease and such like.

3. Act on the Japan Sport Council

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

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

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

In July 2009, Japan was selected to host the 2019 Rugby World Cup. In Addition to the event's national significance as well as its close

connection to the preparation and management of the 2020 Tokyo Olympic and Paralympic Games, the "Act on Special Measures for Rugby World Cup 2019" was enacted in June 2015 to ensure that preparations for the event would go well and that it would be run smoothly. These measures include activities such as issuing charitable postcards and dispatching government officials to the organizing committee. This Act was partially revised in June 2018 to make the organizing committee exempt from the provision of the Radio Act, which stipulates the fees for registering and operating radio stations and applying for related permits.

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

In September 2013, Tokyo was successful in its bid to host the 2020 Olympic and Paralympic Games. Considering the significant impact hosting the Olympics would have on Japan, the "Act on Special Measures for the 2020 Tokyo Olympics and Paralympics" was enacted in June 2015 to ensure that preparations for the event would go smoothly. These measures include activities such as issuing charitable postcards, dispatching government officials to the organizing committee, establishing an Olympic Promotion Office and making government assets (the JGSDF Asaka Exercise Area, Kokyogaien National Garden and Kitanomaru Garden) freely available to use. As a result of the partial revision of the Act in June 2018, special exemptions were added to the Act on National Holidays for 2020 only: the Marine Day observed annually on the third Monday in July was moved to July 23, the day prior to the Olympics opening ceremony; the Sports Day observed on the second Monday in October was moved to July 24, the day of the Olympics opening ceremony; and the Mountain Day observed on August 11 was moved to August 10, after the Olympics closing ceremony.

In conjunction with the one-year postponement of the Tokyo 2020 Games, the Act was partially amended again in 2020 to include a name change to the "Act on Special Measures for the 2021 Tokyo Olympic and Paralympic Games", a one-year postponement of the deadline for the establishment of the Promotion Headquarters, and special measures to change the national holiday again in 2021 in connection with the postponement of the games.

6. Act on the Promotion of Anti-Doping Activities in Sport

In October 2018, the Act on the Promotion of Anti-Doping Activities in Sport enters into force and is intended to boost future anti-doping activities

across the country. The Act was passed in accordance with the contents of the Basic Act on Sport enacted in 2011 as well as the International Convention against Doping in Sport adopted by the UNESCO in 2005. The UNESCO convention, a global agreement between governments on anti-doping activities, is the first shared international standards for anti-doping. In addition to formulating basic principles related to anti-doping activities and clarifying the role of the national government, the Act aims to comprehensively promote anti-doping policies and contribute to the sound development of sport.

The Act is comprised of 16 total articles. The Article 3 establishes fairness in sport as well as maintaining and improving the mental and physical health of athletes as basic principles, stipulating that: (a) the inspections conducted within anti-doping activities must be fair and transparent; (b) anti-doping activities must be implemented in a way that ensures the independence and autonomy of the organizations that manage sport competitions; and (c) diversity in sport must be considered when implementing anti-doping activities. Based on the basic principles stated in the above article, the article 5 clarifies the responsibilities of the national government with regard to formulating and implementing policies for anti-doping activities. The article 6 defines the role of the Japan Sport Council (JSC) in anti-doping activities. The JSC coordinates with the Japan Anti-Doping Agency (JADA) and serves as a central organization for anti-doping activities.

II. Sport Administration System

1. Sport Administrative Organizations

The promotion of sports in postwar Japan has been led primarily by administrative organizations such as MEXT (formerly the Ministry of Education, Science and Culture) and the Boards of Education in each local government as part of a larger educational administration system (Figure 1-1). MEXT has been responsible for wide range of policies, including those related to school sport and physical education and activities of school clubs as well as regional sport. They are also responsible for hosting and participating in international sport competitions such as the Olympics and Paralympics and the FIFA World Cup and enhancing high performance sport.

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 sport administration. At present, due

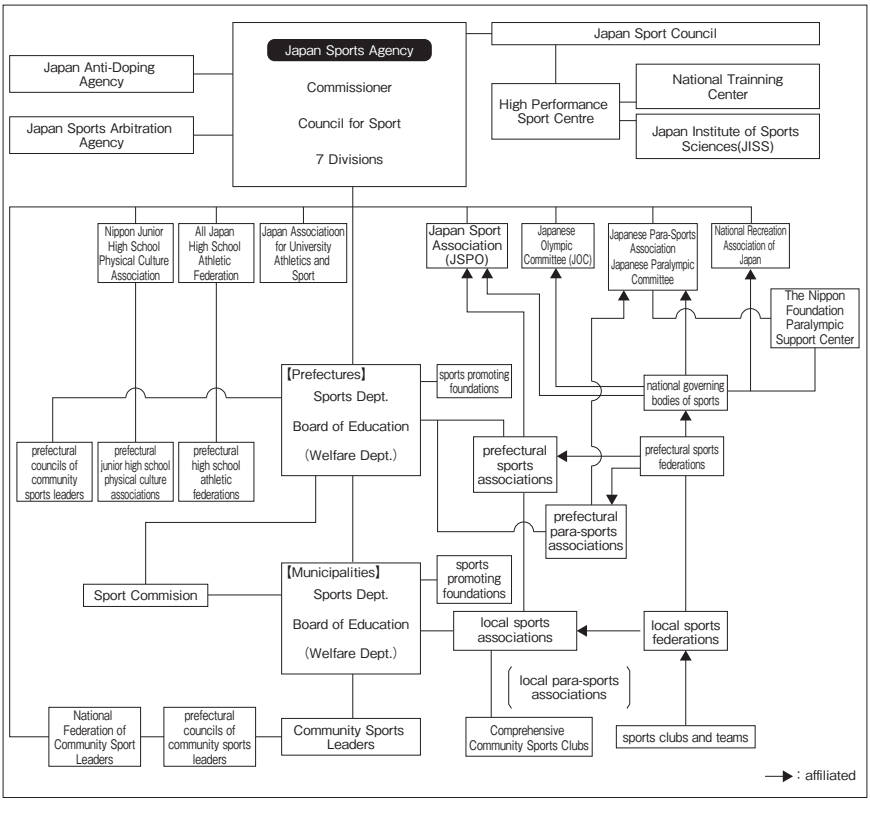


Figure 1-1 Sport Administration Structure in Japan

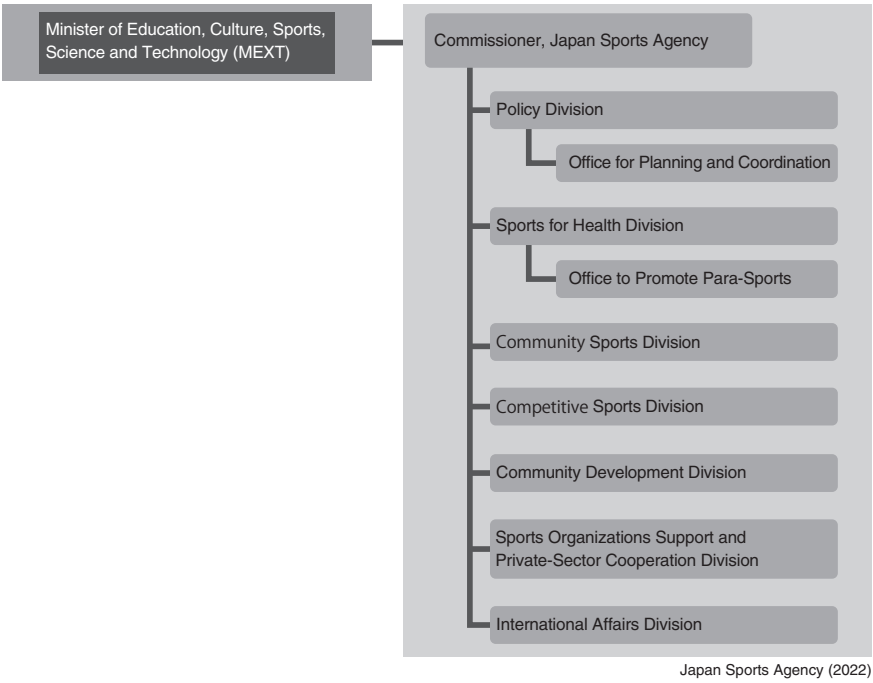
to the reform of the public interest corporation system, these organizations are administered by the Cabinet Office. Moreover, many industries responsible for sport goods and equipment, leisure industries such as golf course, ski resorts and bowling alleys, and health service industries such as fitness clubs are administered by Ministry of Economy, Trade, and Industry (METI).

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

Japan Sports Agency

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

The JSA was created by expanding MEXT's Sports and Youth Bureau into an external bureau and is led by a commissioner, a deputy commissioner, a director-general and a deputy director-general. The four divisions of the Sports and Youth Bureau were reorganized and expanded into the JSA's seven divisions (Figure 1-2). The number of personnel was also increased from 76 at the time of the Sports and Youth Bureau to 121 and is expected to be 114 in FY2023.



Japan Sports Agency (2022)

Figure 1-2 Organization Chart of Japan Sports Agency

Division in Japan Sports Agency

1. Policy Division

The Policy Division is responsible for the overall administration and management of the Japan Sports Agency as well as for the promotion of martial arts and public relations. The Office for Planning and Coordination, established in the Policy Division, is in charge of operations related to The Sport Basic Plan, administration of the sports council and measures for school physical education. Measures for school physical education, which used to be handled by the MEXT, are now under the shared jurisdiction of the Elementary and Secondary Education Bureau of the MEXT and the Japan Sports Agency's Office for Planning and Coordination.

2. Sports for Health Division

The division is responsible for promoting health through sports, including the promotion of sports to the public and the promotion of sports based on the knowledge of preventative medicine, and encouraging participation of women and working generations in sports. It is in charge of the Sport in Life Project, the Sports Yell Company accreditation project, and initiatives related to health management in collaboration with the Ministry of Economy, Trade and Industry (METI). The division also promotes disability sports through its Office to Promote Para-Sports

(note, however, that it was transferred from the Ministry of Health, Labour and Welfare (MHLW) in FY2014 before the Japan Sports Agency was established).

3. Community Sports Division

The Community Sports Division was newly established under the reorganization implemented in FY2022. It is responsible for reforming sports club activities in schools, which is one of the major policies of the Japan Sports Agency, and reviews the phased transition of sports club activities on holidays in public junior high schools and other public schools to local communities and the competitions in which participation is on a school basis.

The division is also in charge of promoting community development through sports, such as strengthening the operating structure of integrated community sports clubs and promoting local sports activities, and promoting sports activities for preschool children through to university students by utilizing the Physical Activity Guidelines for Early Childhood in the field, enhancing youth sports clubs, supporting university sports and taking other steps.

4. Competitive Sports Division

In an aim to enhance international competitiveness for the Olympic and Paralympic Games and other events, the division works to support activities to strengthen top athletes and to build a base for reinforcement and research activities for top athletes. In the former, the division provides support for intangible aspects, such as supporting various sports organizations with reinforcement activities and implementing professional and high-level support in a strategic and comprehensive manner through sports medicine, science and information for sports with high potential for winning medals. In the latter, support for tangible aspects is given, such as the development of a national training center to serve as a base for reinforcement activities. The division also works to ensure the integrity of the sport world through the use of the Governance Code for National Sport Federation Members and to support the strengthening of the organizational base with the aim of promoting reforms and autonomous operation of sports organizations.

5. Community Development Division

This division is in charge of regional revitalization and town planning using sports aimed at vitalizing communities and the economy through promoting sporting events and sports tourism, and hosting tournaments, training camps and such like. It also undertakes projects to promote the effective use of physical education facilities at schools,

adoption of universal design for sports facilities, and public use of private sports facilities in order to secure and enhance a sustainable environment for sports in local communities.

6. Sports Organizations Support and Private-Sector Cooperation Division

This division leads the transformation of sports into a growth industry through digital transformation (DX) in the field of sports, use of technology and promotion of open innovation in sports, and promotion of stadium and arena reforms. It is also responsible for strengthening the management capability of sports organizations, training coaches, instructors and other personnel, and helping athletes develop their careers.

7. International Affairs Division

The International Affairs Division was established in FY2022, taking over some of the duties of the previous International Affairs Division and the Olympic and Paralympic Affairs Division. It has a comprehensive role in international sport strategies including international exchange and cooperation through sports, support for obtaining executive positions in international sports organizations, support through bids and holding international competitions and matches and promotion of anti-doping activities. It also undertakes initiatives to contribute to the achievement of the Sustainable Development Goals (SDGs).

2. The Sport Basic Plan

The Third Sport Basic Plan was formulated in March 2022, outlining the measures and targets to be tackled in the five years from FY2022 to FY2026. In formulating the Third Plan, a review of the four pillars of the Second Plan (FY2017-2021) and changes in social conditions were taken into account.

The first pillar is boosting the participating population, i.e., people who "do", "watch" and "support" sports, and enhancing human resource development and venues for this purpose. Compared with the target values of the Second Plan, which used the percentage of persons playing sports in FY2021 as an indicator of the participating population, 56.4% of adults played sports at least once a week (about 65% of the target value) while 30.4% played sports at least three times a week (about 30% of the target value), and 31.0% of persons with disabilities played sports at least once a week (about 40% of the target value) while 16.5% played sports at least three times a week (about 20% of the target value). Although these percentages reflected a certain level of achievement, increasing from the levels at the time the plan was formulated, the results other than the rate of adults who played sports at least three times a week have not reached

the targets set in the Second Plan. There is a need to continue creating an environment and building momentum for people of the country to play sports, and in particular, to reach out to people in the low-frequency tier who do not play sports at all and those who play sports less than once a week.

The second pillar was the realization of a vibrant, close-knit society through sports. Under the Second Plan, steps were taken by various entities to put in place an environment for the implementation of sports, but the percentage of persons with disabilities playing sports has not reached the target. In addition, the percentage of women playing sports continues to fall short of that of men. As for the realization of a healthy, long-lived society through sports, there is a need to develop a system to accumulate and utilize further evidence. In terms of economic and community revitalization, efforts have been made to promote stadium-arena reforms and sports tourism initiatives. However, the measures initially envisioned have been found to be insufficient in some respects under the COVID-19 pandemic. While such issues remain, the targets set in the Second Plan, including the number of Japanese in executive positions at international sports federations and other organizations, were largely achieved in terms of international exchange and cooperation. There is a need to continue actively promoting international exchange and cooperation through sports, thereby contributing to maintaining and improving Japan's presence in the international community.

The third pillar was the development of strong and sustainable human resources and an environment to enhance international competitiveness. At the Tokyo 2020 Olympic Games, the number of gold medals and the total number of medals both reached record highs. Also at the Tokyo 2020 Paralympic Games, the total number of medals nearly marked a record high. The international competitiveness must be advanced effectively and efficiently also after the Games.

The fourth pillar was the enhancement of the value of sports through the promotion of clean and fair sports. In this regard, the Action Plan for Ensuring Sport Integrity was compiled in December 2018, and initiatives such as the formulation of the Governance Code for National Sport Federation Members were taken. On the other hand, scandals in the management of sports organizations and problematic cases of inappropriate guidance have occurred also in recent years. In addition to striving to eradicate non-compliance, corporal punishment and violence among persons related to sports, it is necessary to strengthen the governance of sports organizations and ensure transparency in their management.

In addition, during the five-year period of the Second Plan, various social conditions changed. In particular, the spread of COVID-19 since 2020, has upended daily life and restricted many sports activities. As a result, the Tokyo 2020 Games were postponed by a year and most of the games were held without spectators. The decrease in opportunities to participate in sports due to the pandemic and the holding of the Tokyo 2020 Games were frequently mentioned in the Third Plan and can be said to have been the social changes that were given the most emphasis in formulating the plan.

Moreover, the declining birthrate, aging population and declining population, particularly in rural areas, are accelerating, leading to a decline in the number of people participating in sports and those who take roles in promoting sports and to widening regional disparities. Rapid technological innovation is also driving the need for digital transformation (DX) across industries. Furthermore, changes in lifestyles, i.e., ways of working and living, as well as the progress of worldwide efforts to realize a sustainable society and a symbiotic society have led to significant changes in the social environment surrounding the sports world in Japan.

In light of these changes, the Third Plan reorganized the essence of sports as enjoying fun and pleasure through voluntary participation in various forms of "doing", "watching" and "supporting" sports. Self-motivation, fun and joy are the essence of value that sport itself has, and are also linked to the idea of well-being. With such value at the base, the additional value that sports contribute to social vitalization is also considered important. Specifically, as stated in the preamble of the Basic Act, such contribution includes the revitalization of local communities through sports, realization of a healthy and energetic long-living society, development of the economy for the people and promotion of global mutual understanding. Necessary measures are required to further enhance the aforementioned value of sports.

Based on the above review of the Second Plan and reaffirmation of the value of sports, the Third Plan, while following the direction of the Second Plan, has two major points. The first point is the succession and development of the sports legacy of the Tokyo 2020 Olympic and Paralympic Games, and the second is the three new perspectives to enhance the value of sports.

3. JSA Measures

(1) Creating sports opportunities in diverse settings

The policy goal is to improve the percentage of people who play

sports and build a society in which each and every person can enjoy the value of sports in their daily lives. To this end, measures will be deployed to create sports opportunities for the people of Japan, enhance sports opportunities for children and improve their physical fitness, improve the percentage of women, persons with disabilities and the working generation who play sports, and promote university sports. Through these measures, the goal has been set to increase the percentage of adults who engage in sports at least once a week to 70% (40% for persons with disabilities), exceeding the numerical target of 65% set in the Second Plan. At the same time, a qualitative goal is newly adopted to increase the number of persons who make it a habit to engage in light physical activities for 30 minutes or more at least twice a week and continue to do so for at least a year, as recommended by the Ministry of Health, Labour and Welfare (MHLW). Specific measures aimed at creating opportunities to engage in sports include the "Sport in Life Project", promotion of integrated community sports clubs, and the "Sports Yell Company" accreditation project.

Aiming to enhance sports opportunities for children and young people in schools and communities and improve their physical fitness, the reform of school-based sports club activities are being carried out based on the direction and measures of reforms proposed by the Council for Review on Transition of School-based Sports Club Activities to Communities, and ways to hold competitions are being reviewed. This will shift the operation and management of junior high school sports club activities to local communities and allow local clubs to participate in competitions. In addition, efforts will be made to raise awareness of the Physical Activity Guidelines for Early Childhood and to develop exercise habits from early childhood through the use of the Active Child Program.

(2) Promoting DX in the sports world

With the introduction of DX to the sports world, efforts are being made to expand the way sports are conducted using advanced technology and big data, and to create new business models using digital technology. The aim is to make it possible to widely provide the public and society with knowledge and opportunities related to various sports, and to increase the effectiveness of "doing", "watching" and "supporting" sports. For example, digital technology will be used to have diverse entities provide a place to conduct sports even for persons who have difficulties going out for health reasons, and advanced technologies such as AI and VR will be used to enhance support for athletes.

In addition, support will be provided for creating business models, including the creation of new sports using digital technology through

awarding business operators who are active in the use of technology, supporting model projects and conducting sports in a virtual space (metaverse). In addition, legal arrangements will be examined for the commercialization of sports-related businesses that has become possible with the development of digital technologies such as non-fungible tokens (NFT) and betting, while efforts will be made to support human resource development.

(3) Enhancement of international competitiveness

The policy goal is to realize targets in the summer and winter Olympic and Paralympic Games as well as the major international competitions of each sport, such as the record-high number of gold medals, total number of medals won, number of prizes won, number of medal winning events and so on. To this end, support will be given to measures of the National Governing Bodies of Sport (NF) for improving athletic performance, in cooperation with the JOC and JPC

The High Performance Sport Center (HPSC) has launched a collaborative team consisting of the JOC, JPC and JSC to build an autonomous and sustainable system at the NF to strengthen athletic performance. In addition, the Japan Sports Agency will develop and assign personnel, such as reinforcement managers, coaches and staff, while enhancing the consultation system and supporting childbirth and child-rearing to promote the success of female athletes and pursue the development and assignment of elite female coaches. This will be done to help establish a system to improve athletic performance.

(4) International exchange and cooperation through sports

The government is working to enhance Japan's global position in the world of sport by promoting international exchange and cooperation through sports. At the same time, setting the policy goal of strengthening ties among countries, regions and people through sports, steps are taken to participate in decision-making in the world of international sports and develop the sports industry internationally. To participate in decision-making, the identification and development of human resources who can play an active role in the International Federations (IF) and other organizations and the dispatch of personnel from the National Federations (NF) and others who will be responsible for the next generation to the relevant organizations will be promoted. The aim is to increase the number of Japanese executives in the IFs, Asian Federations and other organs and seek their re-election in the posts.

As a measure for the international expansion of the sports industry, the "Japan SPorts business INitiative (JSPIN)", a platform to support

this, has been established to encourage the creation of domestic and international networks. In addition, the four parties of the Japan Sports Agency, Ministry of Economy, Trade and Industry (METI), Japan External Trade Organization and JSC signed a basic agreement to promote the international expansion of Japan's sports and sports-related industries.

(5) Health promotion through sports

With the aim of contributing to the realization of a healthy, long-lived society by promoting health through sports and to the extension of healthy life expectancy as stated in Health Japan 21 formulated by the Ministry of Health, Labour and Welfare (MHLW), through the improvement of the percentage of persons playing sports, steps are taken to enhance research on sports that contribute to the promotion of health and implement measures in collaboration with related organizations.

The Japan Sports Agency is working to promote health through sports by disseminating and utilizing scientific knowledge in light of the lack of a system to utilize accumulated evidence on health promotion through exercise and playing sports. Concrete measures and initiatives often overlap with (1) the creation of sports opportunities at diverse settings, in part because they aim to contribute to the improvement of sports implementation rates.

In addition, efforts will be made to develop a system to lead people in the fields of medical and nursing care to sports, in cooperation with medical and nursing care providers, private business operators and insurers.

(6) Promoting sports as a growth industry

A policy goal is set to increase the size of the sports market to 15 trillion yen by 2025 by creating a virtuous cycle of expanding the market and returning profits to improving the sports environment, thereby driving an increase in the number of people participating in sports. The main initiatives are the stadium and arena reform promotion project, which was implemented based on the Second Plan, and the sports open innovation project.

In the stadium and arena reform promotion project, the know-how of the private sector will be shared to promote the transformation of cost centers into profit centers, and therefore the stadium and arena will be realized as the core of community development and regional vitalization. The sports open innovation promotion project will support the development of new business models through open innovation between professional sports organizations and other industries, honor good practices nationwide, and work to build a Sport Open Innovation Platform (SOIP) with sports at the core in communities.

(7) Regional revitalization and community development through sports

By taking steps distinctive to each relevant region toward regional revitalization and community development through sports across the country and promoting solutions to local social issues through the use of sports, the aim is to have sports contribute to local communities and society, further broaden the understanding and support of residents and citizens for the promotion of sports and create a virtuous cycle of promoting sports and promoting regional development. Based on this approach, a target has been presented to raise the ratio of local governments working on community development through promoting sports and health from 15.6% (FY2021) to 40% at the end of FY2026.

The second term of "Comprehensive strategy for overcoming population decline and revitalizing local economies" (2019) by the Cabinet Secretariat pointed out the importance of building distinctive sports legacies in each region, rather than ending the Tokyo 2020 Games as a transient event. The Third Plan also succeeds to this policy with steps taken toward regional revitalization and community development through sports in collaboration with related government agencies. As one of the projects to promote sports and healthy town planning, a system was introduced in FY2021 to award municipalities that implement outstanding measures to promote sports and healthy town planning.

In addition, efforts are being made to further promote sports tourism, which is one of the important factors in regional revitalization through sports. On top of outdoor sports tourism and martial arts tourism, contents development for utilizing local resources such as urban sports and workcations will be continued. Furthermore, in order to improve the quality of the regional sports commission, the management base will be strengthened by contributing to the region through enhancing resident services in addition to inviting customers from outside the region, and by utilizing the community reviving cooperator squad.

(8) Realizing an inclusive society through sports

Through the creation of an environment in which everyone can enjoy the value of sports that they "do", "watch" and "support," and enjoy sports "together" with people in various positions and circumstances, promoting disability sports and encouraging empowerment of women through sports in order to realize an inclusive society centered on sports are underway.

In the promotion of disability sports, in addition to improving the sporting environment so that persons with disabilities can participate in society through sports, efforts will be made to raise awareness of people not engaging in sports and promote understanding of the general public

through having them experience disability sports to encourage changes in people's awareness in an aim to realize an inclusive society. Specifically, there are needs to increase the number of coaches and staff related to disability sports, disseminate the teaching methods accumulated by disability sports associations, etc. and secure human resources to support disability sports.

With regard to promoting empowerment of women through sports, steps will be taken to encourage growth in the percentage of women directors in sport associations to approach the target of 40% in accordance with the Governance Code for National Sport Federation Members (2018) and the Fifth Basic Plan for Gender Equality (2020), in addition to taking initiatives toward increasing the ratio of women engaging in sports. Major initiatives include the formation of a model to match candidates with sports organizations that are active in recruiting female executives and supporting the promotion and development of female executives within sports organizations.

(9) Governance reform and management enhancement of sports organizations to be in charge

By reforming the governance and strengthening the management of sports organizations, which will be the main players in charge of providing sports opportunities, the JSA will develop measures that contribute to ensuring stable opportunities for the public to be involved in sports.

The JSA, in collaboration with the JSC and governing bodies of sports, will conduct training and other programs to enable sports associations to carry out voluntary and autonomous governance reforms. Through this training, the JSA promotes the creation of a mechanism for sharing information among sports organizations for an increase of their profit, while boosting the development of human resources to undertake the efforts to reinforce collaboration and implement strategic management, and the creation of jobs.

(10) Tangible and intangible aspects and human resources essential for promoting sports

In order to secure and strengthen the foundation that is essential for the people of Japan to become familiar with sports, including tangible aspects (venue creation), intangible aspects (environment-building) and human resources, measures which promote the creation of venues and environments, and the development of human resources involved in sports will be carried forward.

In addition to making effective use of existing facilities in accordance with the Guidelines for the Appropriate Stocking of Sports Facilities

(2018), efforts will be made to actively utilize various types of space, such as open spaces in parks and empty spaces in commercial facilities, to create venues for sports outside of sports facilities. In addition, the JSA and JSPO began operating a system for the registration and certification of comprehensive community sports clubs in 47 prefectures in 2022, aiming to build a regional sports environment by improving the quality of comprehensive clubs and promoting efforts to solve regional issues through collaboration with local governments.

For the development of human resources involved in sports, on top of helping active athletes to develop dual careers, the JSA will work with Japan Anti-Doping Association to improve the qualifications and abilities of doping inspectors who can operate in an international way, and boost initiatives similar to a collaboration agreement regarding promotion of sports volunteering activities by the JSPO, SSF and the Japan Sports Volunteer Network, an NPO.

(11) Ensuring safety and security of people engaging in sports

A policy goal was set to ensure the mental and physical safety and security of people who engage in sports so that such people do not leave sports or be deprived of the opportunity to enjoy sports for reasons they are not happy with. With the aim of eradicating violence and abuse in sports coaching, the JSPO has formulated the Model Core Curriculum to train good coaches who will continue to learn throughout their lives, and incorporates the curriculum in the official sports coaching training sessions. In order to prevent slander against athletes and sexual harassment through photos and videos, steps will be taken to ensure an environment where athletes can focus on their sports by means of issuing joint statements compiled by sports-related associations and furnishing information provision forms.

In addition, efforts are being made to improve the environment and to prevent sports accidents and sports injuries so that everyone can enjoy sports safely and with a sense of security by taking measures to prevent fatal accidents during school physical education activities, and reviewing the timing of holding sports competitions in light of climate change and the characteristics of sports.

(12) Ensuring sport integrity

To enhance the integrity of sports in Japan and promote clean and fair sports in an integrated manner, the JSA will strengthen the governance of sports organizations, ensure thorough compliance, develop a dispute resolution system and promote anti-doping activities so that the people of Japan and society can fully enjoy the value of sports.

In addition to striving to eradicate non-compliance, corporal

punishment and violence, etc. among sports personnel, the JSA strengthens governance of sports organizations and promotes the transparency of management of such organizations. In putting in place a dispute resolution system, increasing the number of organizations that adopt automatic acceptance clauses for sports arbitration on top of promoting the understanding of sports arbitration and mediation systems among sports organizations and athletes will be aimed. Further, efforts will be made to contribute to international anti-doping activities through participation in the World Anti-Doping Agency (WADA), to support inspectors who have been trained for the Tokyo 2020 Games to perform at subsequent international competitions, and to maintain and improve the level of knowledge about anti-doping activities of relevant persons in the country.

4. Major Sport Promotion Institutions in Japan

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

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

The Japan Anti-Doping Agency (JADA) was established in 2001 as an institution to promote, educate and coordinate anti-doping activities in Japan. As a contracted party of the World Anti-Doping Code (WADA Code), the 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.

5. Sport Administrative Organizations in Local Governments

Sport Administrative Organizations in Prefectures and Municipalities

Until recently, the regional boards of education were principally in charge of all duties involved in sport administration for each prefecture and municipality. This was due to Article 23, item 13 (Duties and Authority of the Boards 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 sport. 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 sport 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 December 2022, 11 prefectures out of 47 have placed the sport administrative department within their board of education, while 36 have placed the department within the governor's office. According to the Japan Sports Agency's "Survey on Local Sports Administration" (2017), of the 790 municipalities (excluding ordinance-designated cities) polled, 80.4% placed their sport administrative department within the boards of education, while 19.6% placed it within the municipality's head office. Viewed in terms of population, 84.0% of municipalities with at least 500,000 people placed their sport administrative department within the head office, while only 2.3% of municipalities with less than 10,000 did so. Municipalities with smaller populations are therefore more likely to place the department that administers their sport within the boards of education, even after the revision of the Local Educational Administration Act.

By transferring authority of the sport administrative department

from the boards of education to the governor's office, prefectures and municipalities are attempting to not only increase the efficiency of sports-related business, but also to improve coordination with other administrative areas such as culture, tourism, social welfare and community development.

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 sport. 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 (sport 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 23 prefectures in 2005 to 18 prefectures in 2010 and 15 prefectures in 2022. Meanwhile, in September 2020, Fukuoka Prefecture newly established the Fukuoka Prefecture Sports Promotion Fund to contribute to the development of top athletes associated with the prefecture and the revitalization of the region by bidding for and holding

large-scale sports events.

As of October 2022, six of the 20 ordinance-designated cities have quasi-governmental corporations or public foundations. As with similar entities at the prefectural level, these organizations have played a certain role in the regional promotion of sports, although in some cases they have merged with sport associations (Sapporo, Chiba, Yokohama).

III. Sport Budget

1. National Budget for Sport

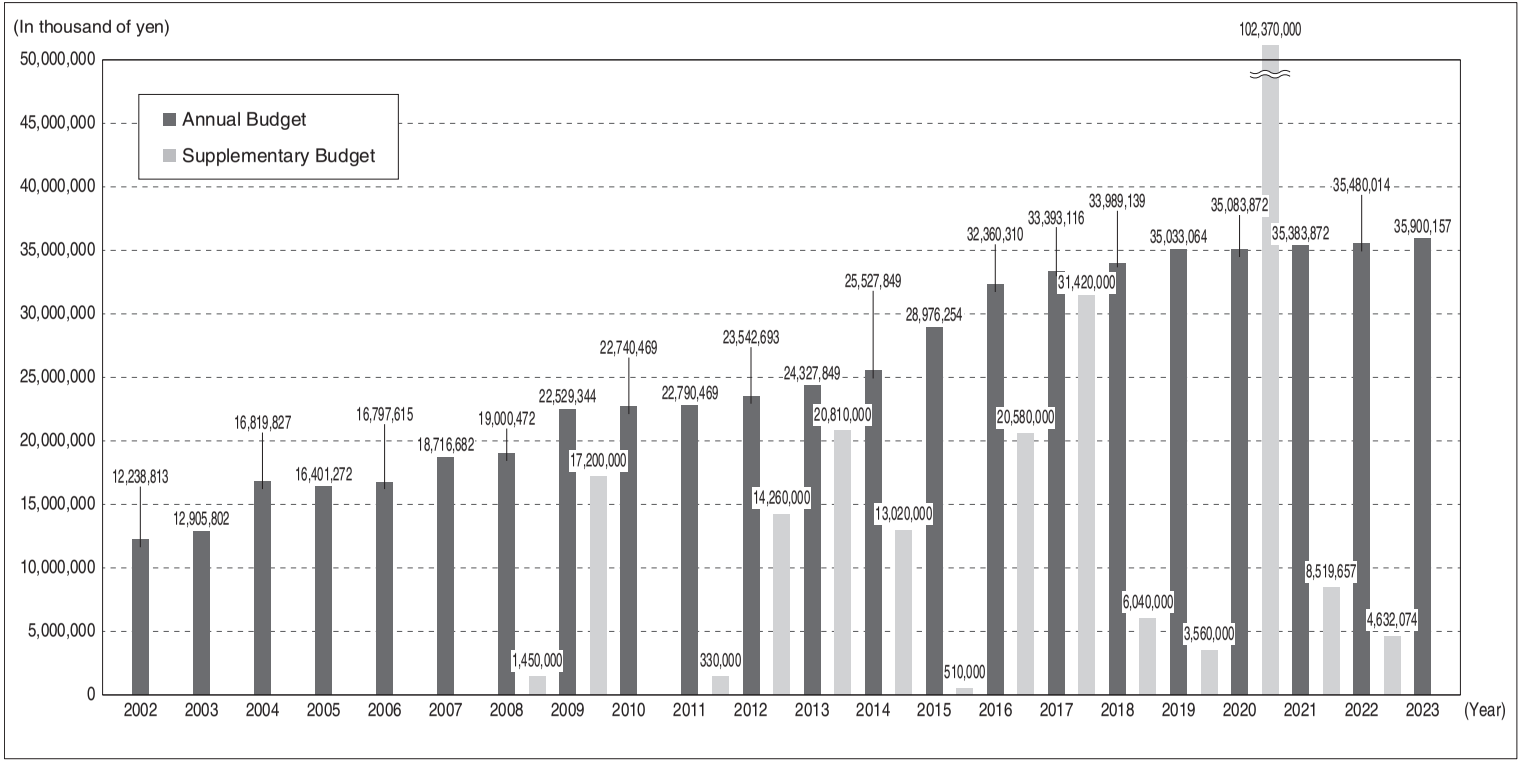
Figure 1-3 shows the budget trends of the Sports and Youth Bureau of the Ministry of Education, Culture, Sports, Science and Technology (MEXT) and the Japan Sports Agency, which have been responsible for promoting sports in Japan. The sports budget, which stood at 12.2 billion yen in FY2002, continued to increase slightly until FY2008, but in response to the revision of the government curriculum guidelines in FY2007, which made martial arts compulsory, the budget for the development of martial arts halls for public junior high schools increased. As a result, in FY2009, the total budget came to 22.5 billion yen, exceeding the 20-billion-yen threshold. After a slight increase thereafter, the budget for FY2015 rose to 28.9 billion yen on the back of the decision to host the Tokyo 2020 Games in September 2013. Then the budget showed a further increase to 32.3 billion yen in FY2016, topping 30 billion yen for the first time. It can be said that creating the Japan Sports Agency, which promotes sports measures comprehensively, accelerated the hike in the sports budget. With the aim of achieving the policy goals set out in the Second Sport Basic Plan, the budget has been the 35-billion-yen mark since FY2017, reflecting the continuous increase in funding for projects related to improving athletic performance in preparation for international competitions and for developing measures that contribute to solving social issues through sports. The budget for FY2023 hit a record high of 35.9 billion yen, including 2.8 billion yen earmarked for environmental improvement in anticipation of the gradual transition of school-based sports club activities to local communities.

In addition to the initial budget set each fiscal year, there are additional amounts from the supplementary budget. A supplementary budget is created when new financial needs arise in the middle of a fiscal year. In FY2020, a supplementary budget was drawn up three times, providing additional funds of 102.37 billion yen. Of this amount, 56 billion yen was appropriated for COVID-19 countermeasures in the Tokyo Olympic and Paralympic Games and 12.69 billion yen for COVID-19 countermeasures in host towns and others, reflecting the government's policy of taking emergency measures against COVID-19. The amount also included funds for projects to support the holding of local tournaments to replace national tournaments for school sports club activities and projects to establish exercise habits for children in the aftermath of COVID-19. In particular, 4.8 billion yen was appropriated as a subsidy for continuing sports business to help cover the expenses of sports organizations and individual business

operators who were forced to refrain from holding activities due to the pandemic, so they can resume or continue their activities.

In FY2021, 8.5 billion yen was set aside as a supplementary budget, which was passed for the purpose of preventing the spread of COVID-19, continuing from the previous fiscal year, and resuming socioeconomic activities and preparing for the crisis under the policy of co-existing with COVID-19. Of this amount, 5.1 billion yen was earmarked to support the holding of national-level sports events and such like to subsidize part of the costs necessary for sports organizations, etc. that host national sports leagues or tournaments to do so with thorough implementation of measures against infectious diseases at the games and publicize such measures taken. The aim is to ensure thorough implementation of measures against infectious diseases by improving the way games are operated, to expand the provision of experiential opportunities during the pandemic and to thoroughly implement measures against infectious diseases at international tournaments. In addition, 1.0 billion yen was provided to support the development of a sports environment to prevent people with disabilities from refraining from exercise, and 0.83 billion yen was granted to the Japan Sport Council, founder of the High Performance Sport Center, to cover the expenses needed to put in place a system for measures against infectious diseases at the Center.

The supplementary budget passed in FY2022 was 4.6 billion yen. In order to ensure the smooth implementation of an integrated environment for collaboration between school-based sports club activities and local communities and the transfer of school-based activities to local sports clubs from the beginning of FY2023, 1.9 billion yen was allocated to help cover the expenses required for local municipalities to establish a transition system, such as holding training sessions for general coordinators to liaise and coordinate with related parties and establishing human resource banks.



MOF (2021), MEXT (2022), Japan Sports Agency (2022)

Figure 1-3 Trends in the National Sport Budget

IV. Sport Integrity

1. Trends in Promoting Sport Integrity

In 2011, Jacques Rogge, then president of the International Olympic Committee (IOC), raised concerns about the potential threat to sports from pressure caused by illegal sports betting and other misconduct, stating that "Sport is in danger." On March 1 of the same year, Ronald Nobel, then the secretary-general of the International Criminal Police Organization (Interpol), warned at a meeting at IOC headquarters that "the pressures that threaten sport integrity are growing, and they are coming from all corners of the world in a variety of ways."

Against this backdrop, a public symposium on sport integrity as the main theme, organized by the Japan Sport Council (JSC), was held in Tokyo for the first time in Japan in 2014. At the symposium, the critical state of sports was pointed out regarding the fact that in the international community surrounding today's sports world, a number of threats that shake the integrity of sports at its core could be noted. In FY2014, the JSC established a Sport Integrity Unit to protect and enhance sport integrity against a variety of threats to sports, including match-fixing, illegal gambling, lack of governance, violence and doping, through taking measures to protect sport integrity.

It is estimated that it was around 2010 that the emergence and spread of the use of the term integrity in public sports organizations in Japan and abroad became prominent. It has also been pointed out that this was because in addition to doping, there were ethical and social issues that threatened a wide range of values in sports, such as issues including match-fixing and illegal gambling, violence, harassment and lack of governance and compliance.

2. Understanding Sport Integrity and Related Initiatives

Domestic Trends

The following concepts and policy goals are set out in the Second Sport Basic Plan in which the term sport integrity was published for the first time. First of all, to understand what sport integrity refers to, while it is not necessarily given a clear definition, the word integrity means having honesty, prudence and virtue, and sport integrity is a concept that has been considered important around the globe. It is recognized as a state of being free from such injustices as doping, match-fixing, illegal gambling, violence, harassment, discrimination and lack of group governance, and is achieved as a result of people involved in sports acting honestly based on their strong moral principles.

As for specific policies, following the establishment of a policy target of "aiming to further enhance the value of sports by enhancing the integrity of sports in Japan and promoting clean and fair sports in an integrated manner toward the 2020 Tokyo Olympic and Paralympic Games," specific measures were set as below.

- The government shall, in cooperation with the JSC, JOC, Japan Sport Association (JSPO) and Japanese Para Sports Association (JPSA), develop evaluation indicators for the management of sports organizations, develop the necessary systems to continuously monitor and evaluate sports organizations, provide necessary advice to organizations that need support and take other steps to integrally address sport integrity.
- The government shall, in cooperation with sports organizations, work to vitalize the initiatives of sports organizations through providing information on excellent sport integrity initiatives.
- The government shall promote highly transparent and sound management of sports organizations in compliance with relevant laws and regulations through developing response procedures, etc. in the event of inappropriate incidents occurring in sports organizations and supporting the reinforcement of human resources and financial resources, which are the foundation of organizational management.
- In light of the concerted efforts of professional sports organizations to promote sport integrity, the government shall provide information and necessary advice, including compliance seminars.

Furthermore, in the Third Sport Basic Plan, "Ensuring sport integrity" was specified among the 12 measures to be taken comprehensively and systematically over the next five years in Japan. The Third Plan states that "(Sport integrity) is the state of integrity in which sports are free from a variety of threats. Examples of threats include doping, match-fixing, gambling, illegal drugs, violence, harassment of various kinds, racial discrimination and lack of governance in sports organizations."

Under the policy goal of "improving the percentage of people who play sports and building a society in which each and every person can enjoy the value of sports in their daily lives," specific measures have been set out for strengthening the governance and ensuring compliance of sports organizations, developing a dispute resolution system, promoting anti-doping activities, eradicating violence and abuse in sports coaching, and taking steps to prevent problems such as slander and discrimination on social media.

Chapter 2
Sport Participation

I. Participation in Sport and Physical Activities by Adult

1. Participation in Sport and Physical Activities

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

In this survey, the participation of adults in sport and physical activities were divided into the following levels; "Level 0" for those who did not participate in any sport 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, with a duration of "more than 30 minutes" and with more than moderate intensity (Table 2-1).

The levels of participation in sport and physical activities by adult 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 are at this level as "Active Sports Participants". Since 1992, the percentage

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

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

SSF National Sports-Life Survey (2022)

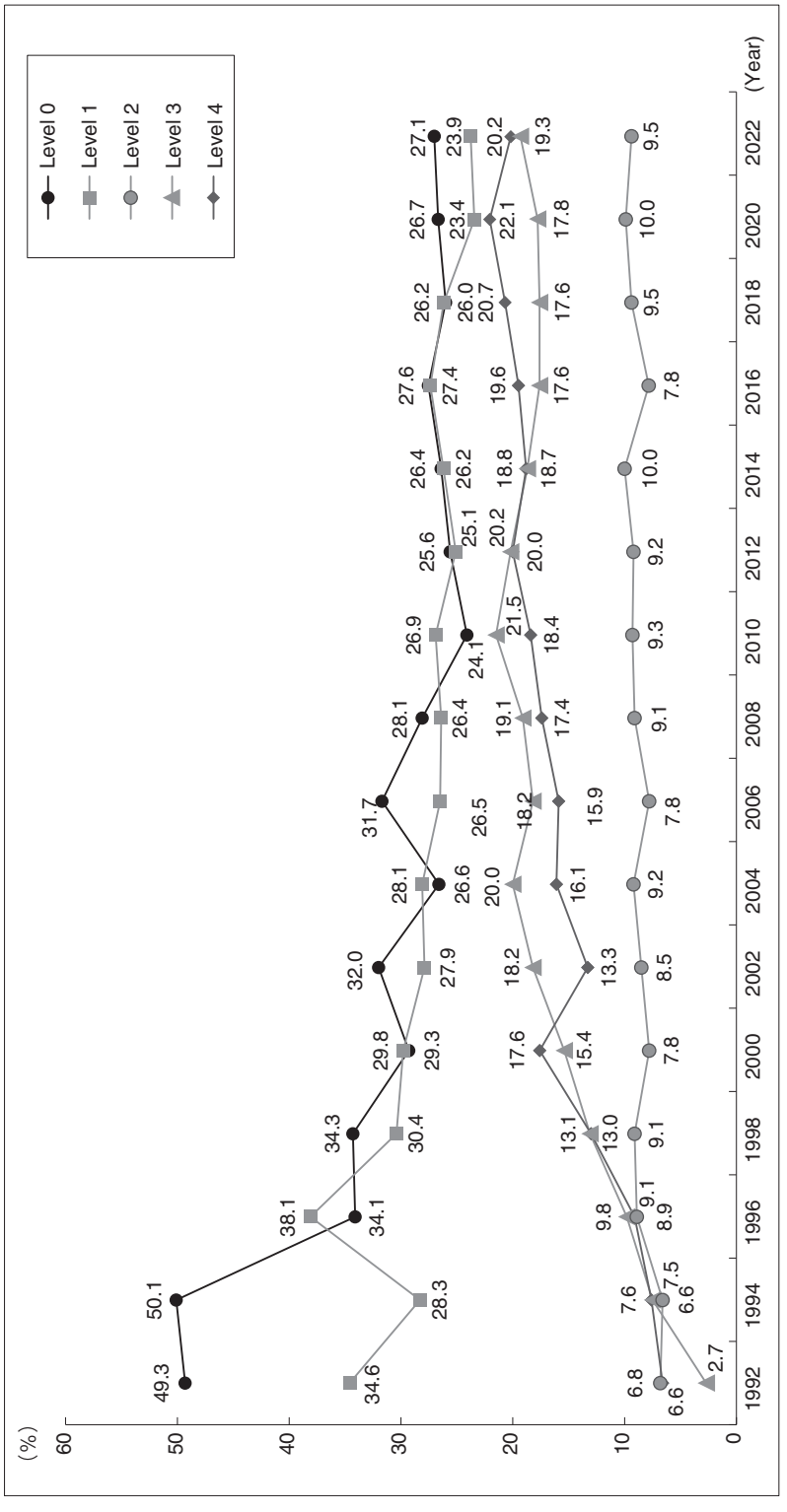


Figure 2-1 Rates of Participation in Sport and Physical Activities

of Level 0 has decreased significantly from 49.3% in 1992 to 24.1% in 2010 and has been on a slight upward trend since then. Level 1 shows a relatively similar trend of its percentage, increasing and decreasing from 34.6% in 1992 to 23.9% in 2022. On the other hand, the percentages of Level 3 and Level 4 are on the rise. Over the 30-year period from 1992 to 2022, Level 3 increased from 2.7% to 19.3%, and Level 4 increased from 6.6% to 20.2%, an increase of more than 10 percentage points. Level 2 increased slightly from 6.8% in 1992 to 9.5% in 2022, but the change is smaller than for the other levels.

Comparing 2018 and 2020 to confirm pre- and post-epidemic changes in the novel coronavirus (COVID-19) infections, Level 0 increased slightly by 0.7 points from 26.0% to 26.7%. Furthermore, the percentages of Levels 2 to 4 also increased, from 9.5% to 10.0% at Level 2, from 17.6% to 17.8% at Level 3 and from 20.7% to 22.1% at Level 4 respectively, but the differences were negligible. In terms of changes before and after the Tokyo 2020 hosting, which were postponed one year and held in 2021 due to the COVID-19 pandemic, Level 0 increased 0.4 percentage points from 26.7% to 27.1% between 2020 and 2022. At Levels 2 and above, Level 3 increased by 1.5 points, while Levels 2 and 4 decreased by 0.5 and 1.9 points, respectively. However, changes at both levels were slight.

These overviews show that although there have been major social changes since 2018, such as the spread of the COVID-19 infections and the Tokyo 2020 hosting, there have been few changes in the participation rate for sport and physical activities during this period. There was no significant difference in the overall sport and physical activities within the past five years.

2. Participation in Sport and Physical Activities by Gender

The changes in the participation rate for sport and physical activities over the last ten years (2012 to 2022) were compared by gender (Table 2-2). For men, in 2022, 24.8% were in Level 0, 26.1% in Level 1 and 22.9% in Level 4. As for changes over the past decade, Level 0 for men has increased slightly. Level 1 was around 30% until 2018, but since 2020 it has decreased to less than 30%. Furthermore, Level 4 was the highest in the last decade at 24.1% in 2020.

For women, the participation rate for sport and physical activities in 2022 was found as 29.3% for Level 0, 21.6% for Level 1 and 17.6% for Level 4. Regarding the changes in the participation rate for sport and physical activities over the past 10 years, Level 0 increased from 2012 to 2016 and decreased to 28.2% in 2018, the same level as in 2012, but has

Table 2-2 Rates of Participation in Sport and Physical Activities (By Gender) (%)

Level	2012	2014	2016	2018	2020	2022
Men Level 0	22.8	23.2	24.1	23.8	23.9	24.8
Women Level 0	28.3	29.5	30.9	28.2	29.4	29.3
Men Level 1	30.0	30.6	31.5	30.7	28.3	26.1
Women Level 1	20.3	21.9	23.3	21.7	18.6	21.6
Men Level 4	20.4	20.9	21.9	21.9	24.1	22.9
Women Level 4	19.5	16.5	17.4	19.4	20.1	17.6

SSF National Sports-Life Survey (2012-2022)

increased slightly since then. Level 1 has fluctuated, but remains at around 20%. Level 4 decreased from 2012 to 2014, then increased until 2020, and then decreased again in 2022.

Finally, a comparison of the participation level for sport and physical activities between men and women shows a higher percentage of women in Level 0 and a higher percentage of men in Levels 1 and 4. This trend has continued for the past decade.

3. Participation in Sport and Physical Activities by Types of Sport

Table 2-3 shows the trends in the participation rate for various types of sport (performed at least once in the previous year). In 2022, "Strolling" was the highest at 31.8%, followed by "Walking" (29.4%), "Calisthenics and light exercises" (17.4%) and "Weight training" (16.4%). These four activities have had a high rate of participation over the past 10 years and have occupied the top activities since 2014. In addition, "Jogging/Running" has not changed much in the participation rate itself, but its ranking has been rising year by year, and the participation rate in 2022 was 8.9%, the fifth highest. The above activities can be performed by a single person and do not require special equipment or facilities, and because they can be performed casually, the participation rate is considered consistently high.

As for others, "Fishing", "Cycling", "Golf on a course", "Golf practice on a driving range" and "Bowling" were highly participated in 2022. Among these, a distinctive trend in recent years has been a downward trend in the "Bowling" rate since 2012. Especially since 2018, both its participation rate and ranking have decreased, and this may be partly due to the closure of facilities by the COVID-19 pandemic. A similar trend was also seen in "Swimming", with a participation rate of around 7% from 2014 to 2018, but since 2020 it has not entered the top ten.

Table 2-3 Rates of Participation in Sport and Physical Activities (By Types of Sport)

(%)

Rank	2012		2014		2016		2018		2020		2022	
1	Strolling	34.9	Strolling	33.0	Strolling	31.7	Strolling	30.9	Strolling	32.9	Strolling	31.8
2	Walking	25.0	Walking	25.7	Walking	23.5	Walking	25.4	Walking	28.3	Walking	29.4
3	Calisthenics and light exercises	20.5	Calisthenics and light exercises	18.5	Calisthenics and light exercises	17.0	Calisthenics and light exercises	19.6	Calisthenics and light exercises	19.4	Calisthenics and light exercises	17.4
4	Bowling	13.0	Weight training	13.0	Weight training	13.7	Weight training	15.2	Weight training	18.0	Weight training	16.4
5	Weight training	12.2	Bowling	10.0	Bowling	9.5	Bowling	9.9	Jogging/Running	10.6	Jogging/Running	8.9
6	Jogging/Running	9.7	Jogging/Running	9.5	Jogging/Running	8.9	Jogging/Running	9.6	Fishing	7.8	Fishing	7.2
7	Golf on a course	8.3	Golf on a course	7.5	Fishing Swimming	7.4	Golf on a course	8.1	Bowling	6.8	Cycling	7.0
8	Golf practice on a driving range	8.0	Cycling Golf practice on a driving range Swimming	7.2			Fishing	7.2	Cycling	6.6	Golf on a course	6.7
9	Fishing Playing catch	7.5			Golf on a course	7.0	Swimming	6.9	Golf on a course	6.4	Golf practice on a driving range	6.1
10					Cycling	6.8	Golf practice on a driving range	6.6	Jumping rope	6.3	Bowling	5.5

Performed at least once in the previous year.

SSF National Sports-Life Survey (2012-2022)

4. Participation in Sport and Physical Activities during the COVID-19 Pandemic

The SSF conducted a "National Survey on The Effects of COVID-19 on Sports and Physical Activities" to examine the participation status for sport and physical activities in the COVID-19 pandemic. This survey was performed three times, every four months, in June and October 2020 and February 2021, among men and women aged 18-79 years throughout Japan, in an attempt to understand the impact of the COVID-19 pandemic on their sport and physical activities.

In terms of the participation rate for sport and physical activities by types of sport during the COVID-19 pandemic, "Walking" was 27.1% from February to May 2020, 23.1% from June to September, 25.2% from October 2020 to January 2021, and "Strolling" was 18.4%, 12.2%, 14.2% and "Weight training" was 11.4%, 9.7%, 10.0%, during the same periods (Table 2-4). The top-ranked activities that can be performed relatively casually at home or around home were most frequently conducted from February to May during the year. On the other hand, the rates of other activities using sport clubs and facilities such as "Golf on a course" (3.0%, 3.5%, 3.6%), "Golf practice on a driving range" (2.7%, 3.2%, 3.4%), "Swimming" (1.5%, 2.2%, 1.7%) were the lowest from February to May 2020, then showing a slight increase to flat trend after June 2020. The closure and subsequent reopening of sport clubs and facilities due to the state of emergency declaration issued in April 2020 is thought to have affected the participation rate for sport and physical activities.

Table 2-4 Rates of Participation in Sport and Physical Activities during the COVID-19 Pandemic (By Types of Sport) (%)

Rank	Sport	February 2020 - May 2020		June 2020 - September 2020		October 2020 - January 2021
1	Walking	27.1	→	23.1	→	25.2
2	Strolling	18.4	→	12.2	→	14.2
3	Weight training	11.4	→	9.7	→	10.0
4	Jogging/Running	6.4	→	5.5	→	5.4
5	Calisthenics and light exercises	5.9	→	4.0	→	4.6
6	Golf on a course	3.0	→	3.5	→	3.6
7	Golf practice on a driving range	2.7	→	3.2	→	3.4
8	Cycling	4.0	→	3.3	→	2.8
9	Yoga	2.5	→	2.6	→	2.5
10	Swimming	1.5	→	2.2	→	1.7
	Didn't participate in any sport and physical activities	49.9	→	55.2	→	52.6

National Survey on The Effects of COVID-19 on Sports and Physical Activities (2021)

The one-year trend in the percentage of people who did not participate in any sport and physical activities was 49.9% from February to May 2020, 55.2% from June to September 2020 and 52.6% from October 2020 to January 2021, with the lowest percentage in February to May 2020. In the one year since the first infection with the COVID-19 in Japan, it can be said that the largest number of people conducted sport or physical activities from February to May 2020, which includes the period of the first declaration of the state of emergency.

5. Number of Registered Players by Types of Sport

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

The number of registered players that were released by NGBs and the estimated number of participants in top sports that were performed by the participants at least once a year according to the results obtained from "The 2022 SSF National Sports-Life Survey" and "The 2021 SSF National Sports-Life Survey of Children and Young People", were listed in Table 2-5.

When the number of individual players was examined, the sport that had the largest number of registered players was "Football" with 919,466 people, followed by "Golf" (629,070), "Basketball" (597,375), "Track and field" (425,280), "Volleyball" (418,847), "Badminton (303,743)" and "Soft tennis" (278,005). By gender, the number of men registered was higher than that of women in many sports, with the exception of "Volleyball", "Badminton" and "Aerobics" that had a higher number of women.

Table 2-5 Number of Registered Players and Estimated Participants

Sport	Number of Registered Players			Participation Rate(%)		Estimated Number of Participants (in 10,000s)
	Total	Men	Women	Age 12-17	Adult	
Golf	629,070	567,963	61,107	1.2	6.7	715
Badminton	303,743	148,348	155,395	25.1	4.8	676
Bowling	10,910	8,435	2,475	7.6	5.5	631
Swimming	128,669	-	-	9.5	4.8	570
Mountaineering	5,340	-	-	3.8	5.1	564
Table tennis	188,511	115,892	72,619	17.5	4.0	541
Football	919,466	863,206	56,260	25.8	3.4	534
Basketball	597,375	344,337	259,722	20.6	2.8	435
Volleyball	418,847	159,125	259,772	21.9	2.3	391
Baseball	12,202	11,893	309	12.0	2.8	376
Tennis	10,620	6,855	3,765	6.2	2.7	327
Soft tennis	278,005	148,923	129,082	8.3	1.1	172
Ground golf	156,023	94,461	61,562	0.0	1.3	137
Aerobics	1,321	217	1,104	1.2	1.2	135
Softball	172,256	100,697	71,559	4.5	0.9	125
Track and field	425,280	275,187	150,093	9.3	0.4	105
Ice skating	7,112	-	-	1.6	0.7	85
Flying disc	5,185	3,439	1,746	2.6	0.5	71
Surfing	10,326	8,833	1,493	0.1	0.6	64
Boxing	3,388	2,959	429	0.1	0.6	64
Karate	86,707	-	-	1.6	0.5	64
Judo	143,549	115,937	27,612	2.7	0.3	50
Canoe	3,407	2,398	1,009	0.3	0.4	44
Rowing	9,074	6,098	2,976	0.5	0.2	24
Rugby	96,714	91,631	5,082	0.5	0.2	24

Note1 : The estimated number of participants is displayed in a descending order (participants are aged 12 or over, and participated 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 2022 survey by the adult population (of 105,448,713 people based on the Basic Resident Register on January 1, 2021).

2 The number of participants is calculated by multiplying the participation rate suggested in the 2021 survey by the teenage population (of 6,776,072 people based on the Basic Resident Register on January 1, 2020).

Note3 : The registered numbers for mountaineering are players registered to Japan Mountaineering & Sport Climbing Association.

Note4 : Futsal or 5 a side football is not included in the football.

Note5 : The registered numbers for baseball are players registered to Japan Amateur Baseball Association.

Note6 : Soft volleyball is not included in the volleyball.

SSF Survey of the National Governing Bodies of Sports (2021)
SSF National Sports-Life Survey of Children and Young People (2021)
SSF National Sports-Life Survey (2022)

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

1. Participation in Sport and Physical Activities by Children Aged 4-11 Years

The levels of frequency of children's participation in sport and physical activities were divided into 4 groups (Table 2-6). Those who had not participated in any sport 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 sport activities during classes or events at school, kindergarten or nursery school were excluded from this survey.

Concerning the frequency of participation in sport and physical activities, children who never participated in any sport or physical activities (non-participation group) were 3.1%; those who participated at least three times a week (moderate and high frequency groups) were over 79.8%; and those who participated in sport and physical activities at least seven times a week (high frequency group) were 45.4% (Figure 2-2). Half of the children were actively exercising, but about 20% of the children fallen into the non-participation group or low frequency group.

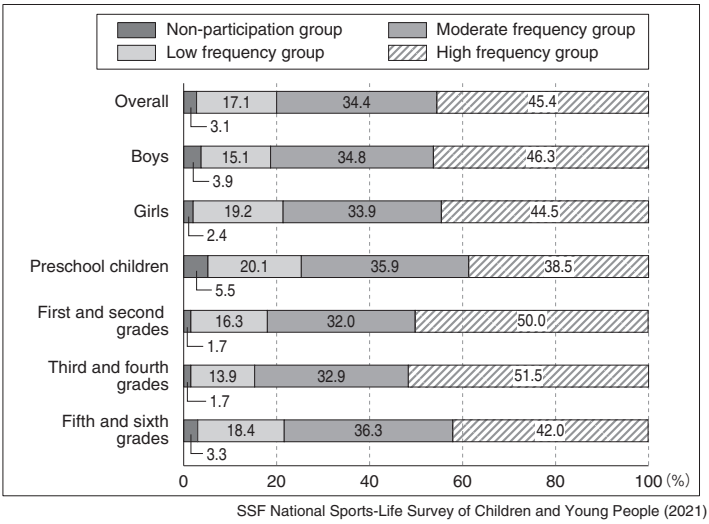
By gender, the moderate frequency group and high frequency group combined account for 81.1% of boys and 78.4% of girls, with boys exceeding girls by 2.7 percentage points.

By school year, the high frequency group is 38.5% for preschool children, 50.0% for first and second grades, 51.5% for third and fourth grades and 42.0% for fifth and sixth grades. The percentage of the high

Table 2-6 Categories of Participation in Sport and Physical Activities for Children Aged 4-11 years

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

SSF National Sports-Life Survey of Children and Young People (2021)



SSF National Sports-Life Survey of Children and Young People (2021)

Figure 2-2 Frequency Levels of Participation for Children Aged 4-11 years (By Gender and By School Year)

frequency group increased from preschool children to third and fourth grades, but decreased in fifth and sixth grades. On the other hand, the percentage of the non-participation group and the low-frequency group combined peaked in the third and fourth grades and declined to 15.6%, but increased in the fifth and sixth grades to 21.7%.

2. Participation in Sport and Physical Activities by Children Aged 4-11 Years by Types of Sport

Table 2-7 shows the ranking of participation in sport and physical activities by children aged 4-11 years (top ten sport and physical activities "often participated in" in the previous year). This excludes sport and physical activities that were performed irregularly, allowing for a more accurate and clear understanding of the types of sport and physical activities that are participated daily. Overall, "Tag" had the highest participation rate of 57.3%, followed by "Bicycle riding", "Jump rope (including long jump rope)", "Dodgeball" and "Swimming". In addition, from 2019 to 2021, the participation rates of activities such as "Jump rope (including long jump rope)" and "Iron bar", which involve little physical contact with humans, have increased, possibly due to the spread of the COVID-19 infection.

Regarding gender, "Tag" had the highest participation rate for boys, followed by "Football", "Dodgeball", "Bicycle riding" and "Swimming", while for girls, "Tag" had the highest participation rate, followed by "Jump rope (including long jump rope)", "Swings", "Bicycle riding" and "Iron

Table 2-7 Ranking of Participation in Sport and Physical Activities by Children Aged 4-11 years (Those Who "Often Participated in" By Gender)

(%)

Overall			Boys			Girls		
Rank	Sport	%	Rank	Sport	%	Rank	Sport	%
1	Tag	57.3	1	Tag	56.7	1	Tag	57.8
2	Bicycle riding	30.3	2	Football	39.1	2	Jump rope (including long jump rope)	37.9
3	Jump rope (including long jump rope)	30.2	3	Dodgeball	35.9	3	Swings	32.8
4	Dodgeball	29.2	4	Bicycle riding	30.1	4	Bicycle riding	30.5
5	Swimming	27.3	5	Swimming	28.8	5	Iron bar	28.2
6	Swings	26.8	6	Jump rope (including long jump rope)	22.3	6	Swimming	25.7
7	Football	22.5	7	Swings	20.7	7	Dodgeball	22.5
8	Iron bar	21.3	8	Hide-and-seek	18.4	8	Hide-and-seek	21.2
9	Hide-and-seek	19.8		Race		9	Race	15.8
10	Race	17.1	10	Iron bar	14.3	10	Badminton	12.0

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

SSF National Sports-Life Survey of Children and Young People (2021)

bar". This suggests that boys at the ages of around 4-11 years are already participating in sport that continue to be popular in junior high and high school years, while girls are mainly participating in play-based activities.

3. Participation in Sport and Physical Activities by Young People Aged 12-21 Years

The participation rates of young people aged 12 to 21 years in sport and physical activities were analyzed in terms of frequency, duration and intensity (Table 2-8).

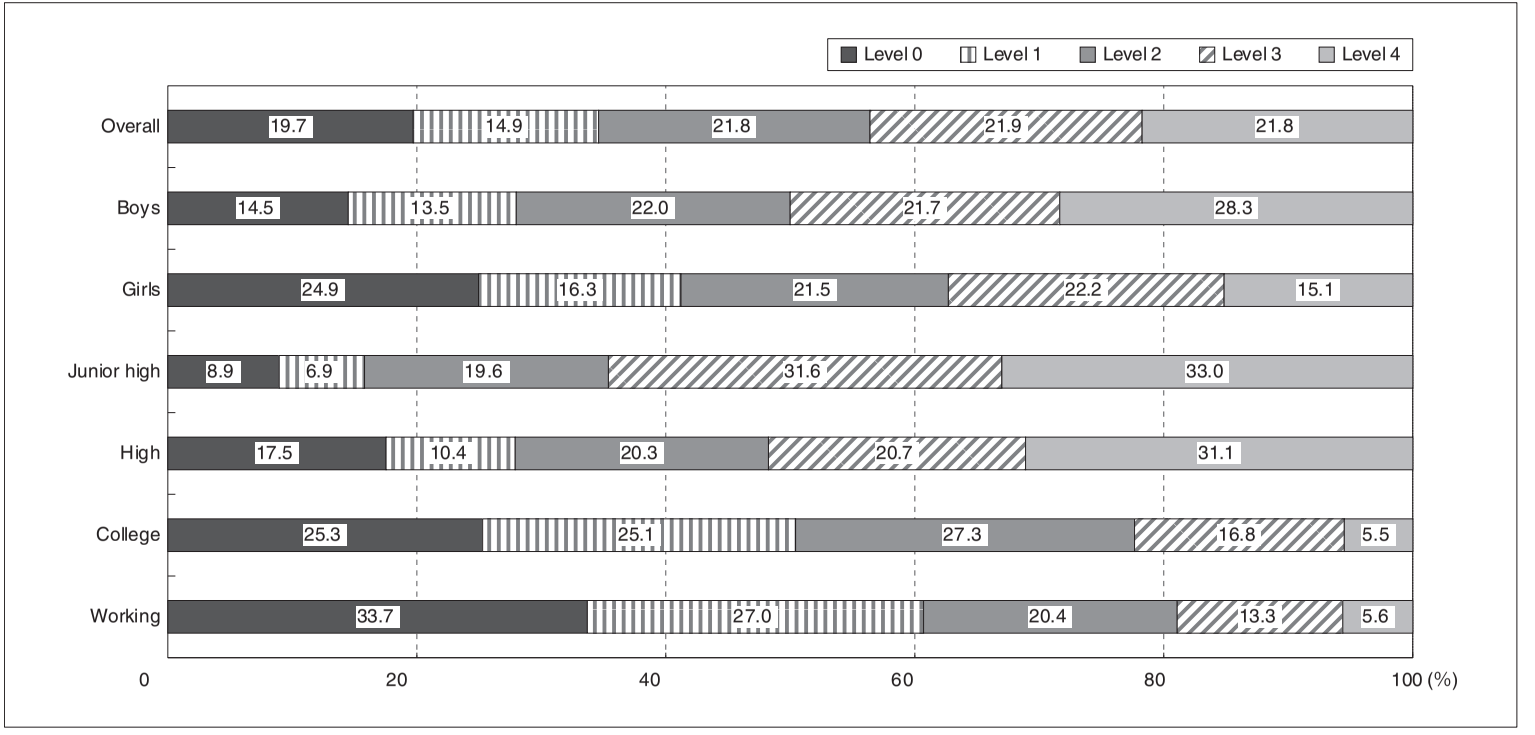
Those who did not participate in any sport or physical activities at all in the previous year were categorized as "Level 0"; those who participated in sport and physical activities at least once a year but less than once a week (1 to 51 times/year) as "Level 1"; those who participated at least once a 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 sport activities during classes or events at schools were excluded from this survey.

From the survey conducted in 2021, the percentage of young people who did not participate in any sport or physical activities in the previous year (Level 0) was 19.7%, representing one in every five young people (Figure 2-3). Those who participated at least five times a week, with a duration of 120 minutes and with more than moderate intensity (Level 4) constituted 21.8% of the young people. These results confirm the polarization of participation rates for sport and physical activities. Furthermore, it becomes clear that one in four girls aged 12 to 21 has not participated in any sport or physical activities in the past year.

Table 2-8 Levels of Participation in Sport and Physical Activities by Young People Aged 12-21 years

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

SSF National Sports-Life Survey of Children and Young People (2021)



SSF National Sports-Life Survey of Children and Young People (2021)

Figure 2-3 Rates of Sport Participation for Young People Aged 12-21 years (By Gender and By School Year)

By school year, the proportion of young people at Level 0 was 8.9% in junior high school years, 17.5% in high school years and 25.3% in college years, indicating a general tendency to increase as school years advanced. On the other hand, "Level 4" declined as school years progressed, with 33.0% in junior high school years, 31.1% in high school years and 5.5% in college years, with a particularly large decrease from high school years to college years. It is possible to confirm the current situation that opportunities for sport and physical activities for junior high and high school students come from sport clubs at schools.

4. Ranking of Participation in Sport and Physical Activities by Young People Aged 12-21 Years by Types of Sport

Table 2-9 shows the ranking of participation in sport and physical activities by young people aged 12-21 years (top ten sport and physical activities "often participated in" in the previous year). In 2021, "Jogging/Running" had the highest participation rate of 23.2%, followed by "Football", "Badminton", "Weight training" and "Basketball".

By gender, "Football" had the highest participation rate for boys, followed by "Jogging/Running", "Baseball", "Weight training" and "Basketball", whereas "Badminton" had the highest participation rate for girls, followed by "Walking", "Jogging/Running", "Weight training" and "Volleyball". For both men and women, the rates of individual activities such as "Jogging/Running", "Weight training" and "Walking" as well as activities with relatively little physical contact with others such as "Volleyball" and "Badminton" have increased from 2019 to 2021.

Table 2-9 Ranking of Participation in Sport and Physical Activities by Young People Aged 12-21 years (Those Who "Often Participated in" By Gender)

(%)

Overall			Boys			Girls		
Rank	Sport	%	Rank	Sport	%	Rank	Sport	%
1	Jogging/Running	23.2	1	Football	32.0	1	Badminton	25.2
2	Football	20.9	2	Jogging/Running	22.6	2	Walking	24.1
3	Badminton	19.7	3	Baseball	18.9	3	Jogging/Running	23.9
4	Weight training	19.5	4	Weight training	17.7	4	Weight training	21.5
5	Basketball	16.4	5	Basketball	17.5	5	Volleyball	17.8
6	Volleyball	16.3	6	Volleyball	15.0	6	Basketball	15.0
7	Walking	16.1	7	Badminton	14.9		Jump rope (including long jump rope)	
8	Table tennis	11.9	8	Table tennis	13.1	8	Tag	14.1
9	Tag	11.7	9	Catch	11.3	9	Table tennis	10.5
10	Baseball	10.9	10	Tag	9.6	10	Gymnastics (light gymnastics, morning radio calisthenics, etc.)	9.2

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

SSF National Sports-Life Survey of Children and Young People (2021)

III. Sport Facilities

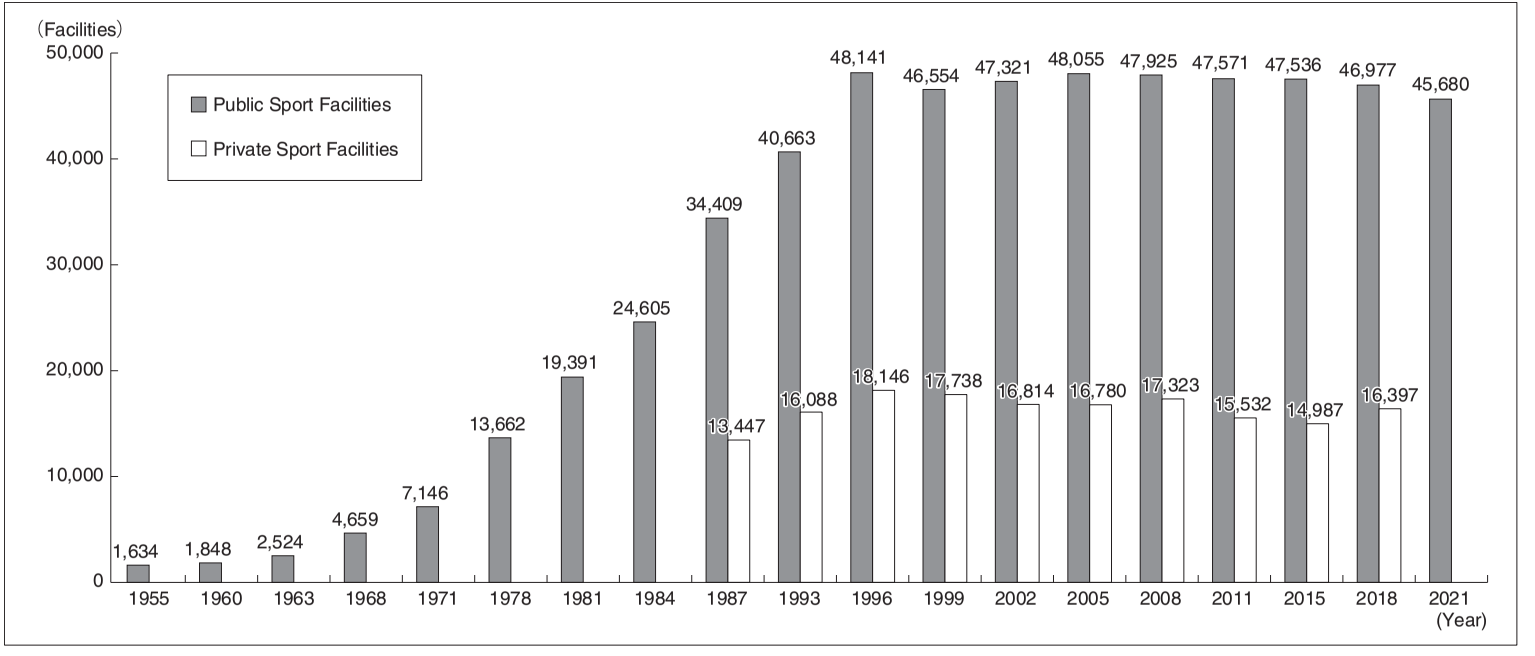
1. Public, Private and School Facilities

According to the "Social Education Survey" of Ministry of Education, Culture, Sports, Science and Technology (MEXT), the number of public sport facilities in Japan increased from the time the survey started in the 1950s to the 1990s, peaked at 48,055 in 2005 since the 2000s, and has remained flat or declined slightly since then, reaching 45,680 in 2021 (Figure 2-4). Similarly, the number of private sport facilities has declined from 18,146 in 1996 to 14,987 in 2015 and 16,397 in 2018.

Moreover, many schools and educational organizations own sport facilities such as gymnasiums, playgrounds and swimming pools, which are used for their physical education classes or school sport clubs. According to the "Survey on the Current Status of Facilities for Physical Education and Sports Activities" (2018) conducted by MEXT, there were 113,054 "school sport facilities" (in elementary, junior high, high, vocational schools, etc.). The number of such facilities has decreased by about 20,000 from the same survey in 2008 to 116,029 in 2015 and has decreased by about another 3,000 since then.

2. Usage of Sport Facilities

In the SSF National Sports-Life Survey, men and women aged 18 and over were asked questions about the usage of sport facilities and locations when engaging in sport and physical activities, and the same questions were asked to young people aged 12 to 21. According to the results, 56.9% of those aged 18 and over used "Streets" the highest, followed by "Home (yard, indoor, etc.)" at 31.3% and "Park" at 17.0%, indicating that sport and physical activities were being conducted in familiar places such as at home and around home. In particular, there was a significant increase from 23.9% in the 2018 survey for "Home (yard, indoor, etc.)". Similarly, for those aged 12-21, "Park" was the highest at 28.9%, followed by "Kindergarten yard/Schoolyard/School ground" at 28.0%, "School gymnasium" at 22.1%, "Around own home or the home of a friend or acquaintance" at 18.8% and "Own home or the home of a friend or acquaintance" at 15.1%. Based on these results, it was confirmed that while the main places for sport and physical activities for young people was at schools, as with those aged 18 and over, sport and physical activities were also frequently performed at home and around home.



As of October 2021.

Social Education Survey (MEXT, 1955-2021)

Figure 2-4 Number of Public and Private Sport Facilities in Japan

Table 2-10 Utilization Rates of Facilities and Places for Sport and Physical Activities

Rank	People aged 18 and over (2022)	(%)
1	Streets	56.9
2	Home (yard, indoor, etc.)	31.3
3	Park	17.0
4	Gymnasium	13.3
5	Plateau/Mountain	11.4
6	Ocean/Beach	10.4
7	Golf course	8.8
8	Training room	8.7
9	Golf driving range	7.2
10	Riverbed	6.0
11	Bowling alley	5.9
12	Sports ground	5.8
13	Indoor swimming pool	5.6
14	Tennis court	3.9
15	Skiing ground	3.6

Rank	Young people Aged 12-21 years (2021)	(%)
1	Park	28.9
2	Kindergarten yard/Schoolyard/School ground	28.0
3	School gymnasium	22.1
4	Around own home or the home of a friend or acquaintance	18.8
5	Own home or the home of a friend or acquaintance	15.1
6	Gymnasium	13.3
7	Streets	11.2
8	School	9.8
9	Bowling alley	5.6
10	Yard of own home or the home of a friend or acquaintance	5.3
11	Skiing ground	5.2
12	Sports ground/Play ground	4.8
13	Inside own home or the home of a friend or acquaintance	4.5
14	Ocean/Beach/Port	4.3
15	Mountain/Plateau/Forest	3.8

Note : If the same person used the same facility or place for different types of the top five "Often participated in" sport and physical activities in the past year, the number of facilities or places was counted as one.

SSF National Sports-Life Survey (2022),
SSF National Sports-Life Survey of Children and Young People (2021)

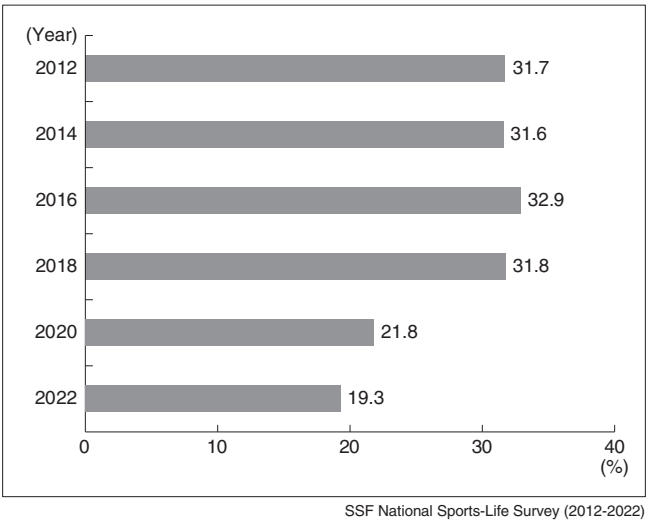
IV. Sport Spectators

1. Sport Spectating at Live Sport Events

According to "The 2022 SSF National Sports-Life Survey", 19.3% of adults had attended a sport event at gymnasiums/arenas or stadium as a spectator in the previous year (Figure 2-5). When compared with previous surveys, the rate of sport spectating increased from 31.7% in 2012 to 32.9% in 2016, the highest rate in the past decade, but then continued to decline, reaching 19.3% in 2022, the lowest rate in the past decade. Although there are limitations for precise comparisons of the spectating rates because of the change in the survey population from 20 and over to 18 and over since 2016, the rate had been increasing and decreasing slightly until 2018, but after 2020 when the COVID-19 pandemic began, it has decreased significantly.

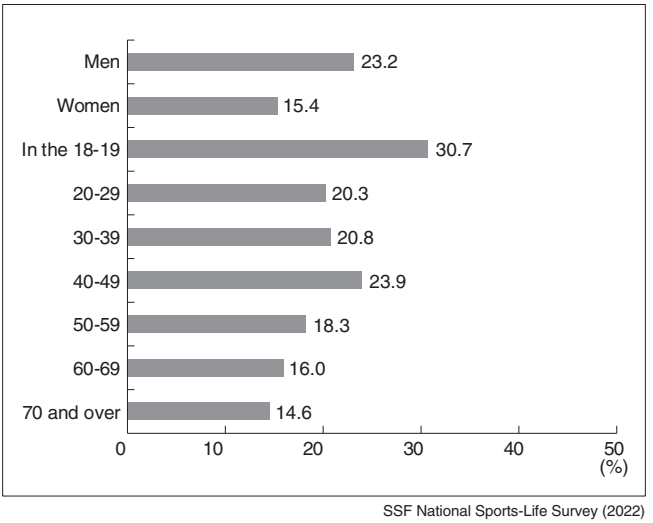
By gender, the spectating rate for men (23.2%) was 7.8 percentage points higher than the rate for women (15.4%) (Figure 2-6). By age, 30.7% of the 18-19 age group and 23.9% of the 40-49 age group were higher than other age groups. On the other hand, the rate among the elderly was relatively low, at 16.0% for the 60-69 age group and 14.6% for the 70 and over age group.

Regarding the results by types of sport, "Professional Baseball (NPB)" had the highest spectating rate at 8.7%, followed by "Professional football (J.LEAGUE)" at 3.0%, "High school baseball" at 2.8%, "Football (high school, university, JFL, WE LEAGUE, etc.)" at 1.3% and "Professional basketball (B.LEAGUE)" at 1.0% (Table 2-11). In addition, "Martial arts (boxing, mixed martial arts, etc.)" has newly risen to the top ten at 0.8%.



SSF National Sports-Life Survey (2012-2022)

Figure 2-5 Rates of Adult Spectating Live Sport Events



SSF National Sports-Life Survey (2022)

Figure 2-6 Rates of Adult Spectating Live Sport Events (By Gender and By Age)

Table 2-11 Popular Spectator Sport (Multiple Answers)

2022			
Rank	Sport	Attendance Rate(%)	Estimated Spectators (in 10,000s)
1	Professional baseball (NPB)	8.7	917
2	Professional football (J.LEAGUE)	3.0	316
3	High school baseball	2.8	295
4	Football (high school, university, JFL, WE LEAGUE, etc.)	1.3	137
5	Professional basketball (B.LEAGUE)	1.0	105
6	Amateur baseball (university, company teams, etc.)	0.9	95
	Basketball (high school, university, W LEAGUE, etc.)		
	Volleyball (high school, university, V.LEAGUE, etc.)		
9	Martial arts (boxing, mixed martial arts, etc.)	0.8	84
	Rugby (high school, university, LEAGUE ONE, etc.)		

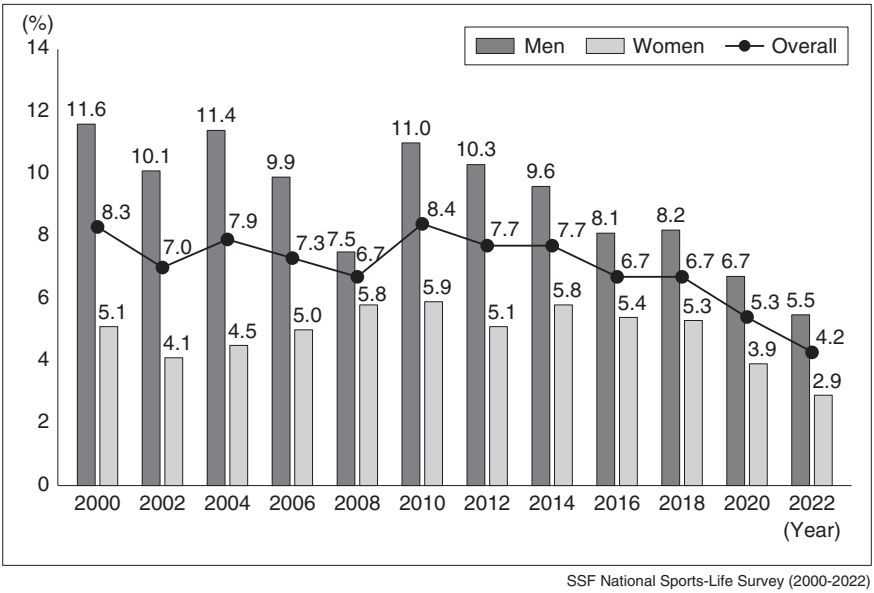
SSF National Sports-Life Survey (2022)

V. Volunteering in Sport

1. Rates and Types of Volunteering in Sport among Adults

According to the "The 2022 SSF National Sports-Life Survey", the rate of volunteering in sport among adults in Japan was 4.2%, down 1.1 percentage points from 5.3% in 2020 (Figure 2-7). It was the lowest rate since the first survey in 1994 at 6.1%. It is assumed that the decrease in opportunities for sport volunteer activities due to the COVID-19 pandemic has brought about a decline in the volunteering participation rate. Based on the rate of 4.2% in 2022, the total number of sport volunteers can be estimated at about 4.4 million people. Regarding gender, the rate for men (5.5%) was 2.6 percentage points higher than the rate for women (2.9%). In terms of age, the 70 and over age group had the highest rate at 5.5%, followed by the 30-39 and 40-49 age groups at 4.1%, the 60-69 age group at 3.9%, the 20-29 age group at 3.5% and the 50-59 age group at 3.4% (Figure 2-8).

The results regarding the types of volunteering in sport indicate that "Running or helping sport clubs" in day-to-day activities was the highest ranked activity at 40.2%, followed by "Coaching" in day-to-day activities at 38.6% and "Running or helping sport events" at local sport events at 33.1% (Table 2-12). The average number of times dedicated to volunteering in sport per year was 51.5 times for "Refereeing" at national and international sport events, followed by 33.8 times for "Coaching" in day-to-day activities and 29.8 times for "Running or helping sport clubs".



SSF National Sports-Life Survey (2000-2022)

Figure 2-7 Rates of Volunteering in Sport among Adults (By Gender)

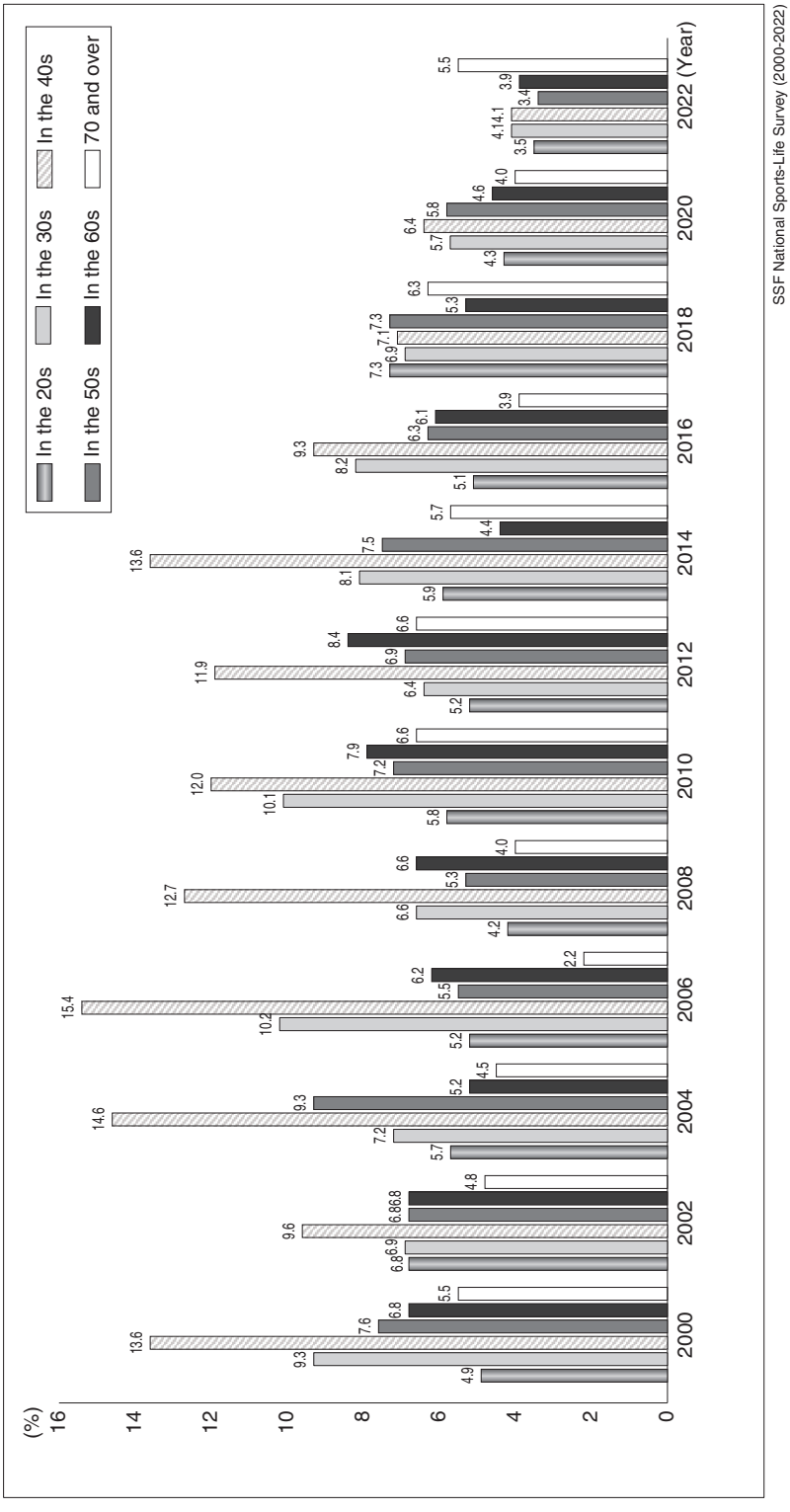


Figure 2-8 Rates of Volunteering in Sport among Adults (By Age)

Table 2-12 Types of Volunteering in Sport among Adults (Multiple Answers)

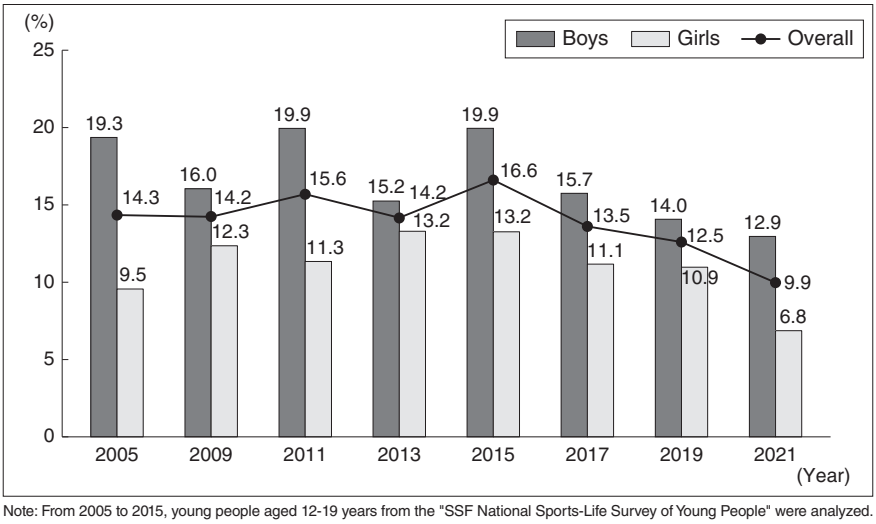
Types of sport volunteer		Participation rate (%)	Frequency (times per year)
Day-to-day activities	Coaching	38.6	33.8
	Refereeing	25.2	10.4
	Running or helping sport clubs	40.2	29.8
	Helping to manage sport facilities	9.4	12.7
Local sport events	Refereeing	13.4	8.5
	Running or helping sport events	33.1	6.9
National and international sport events	Refereeing	1.6	51.5
	Running or helping sport events	6.3	6.0

SSF National Sports-Life Survey (2022)

2. Rates and Types of Volunteering in Sport among Young People Aged 12-21 Years

According to the "The 2021 SSF National Sports-Life Survey of Children and Young People", the rate of volunteering in sport among young people 12-21 years was 9.9% (Figure 2-9). Based on this rate, it can be estimated that the total number of sport volunteers among young people 12-21 years was at about 1.1 million people in 2021. Annual trends show a downward trend after peaking at 16.6% in 2015. The volunteering participation rate in 2021 decreased by 2.6 percentage points from 12.5% in 2019, the lowest rate since the first survey in 2005 at 14.3%. It is assumed that the decrease in opportunities for sport volunteer activities due to the COVID-19 pandemic has caused a decline in the volunteering rate. Regarding gender, the rate for boys (12.9%) was 6.1 percentage points higher than the rate for girls (6.8%). By school year, high school years had the highest rate at 11.6%, followed by junior high school years at 11.1%, college years at 9.0% and young workers at 6.1%.

The results regarding the types of volunteering in sport show that "Judging or helping judges" was the highest ranked activity at 48.8%, followed by "Coaching or helping coaches" at 47.0% and "Helping out at sport events" at 26.2% (Table 2-13). By gender, "Coaching or helping coaches" and "Judging or helping judges" were higher for boys (50.0%, 54.6%) than girls (41.1%, 37.5%), while "Helping out at sport events" was higher for girls (32.1%) than boys (23.1%).



Note: From 2005 to 2015, young people aged 12-19 years from the "SSF National Sports-Life Survey of Young People" were analyzed.

SSF National Sports-Life Survey of Children and Young People (2005-2021)

Figure 2-9 Rates of Volunteering in Sport among Young People Aged 12-21 years (By Gender)

Table 2-13 Types of Volunteering in Sport by Young People Aged 12-21 years (Multiple Answers) (%)

Types of sport voluneer	Overall	Boys	Girls	Junior high	High	College
Coaching or helping coaches	47.0	50.0	41.1	32.1	46.7	66.7
Judging or helping judges	48.8	54.6	37.5	64.3	58.3	22.2
Helping out at sport events	26.2	23.1	32.1	26.8	20.0	30.6

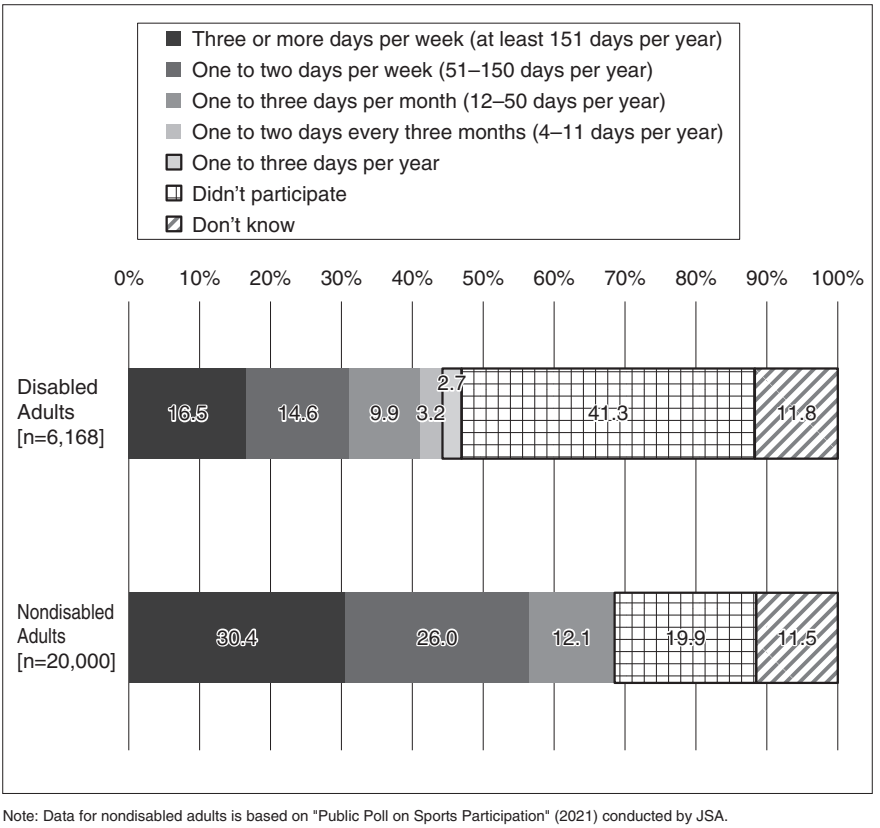
SSF National Sports-Life Survey of Children and Young People (2021)

Chapter 3
Disability Sport

I. Participation in Sport and Recreation by People with Disabilities

1. Participation in Sport and Recreation by People with Disabilities

Figure 3-1 displays the number of days people participated in sport and recreation in the past year, with the results for adults with disabilities on top and those for adults without disabilities at the bottom, respectively. The upper results are based on the report titled "Disability Sport Promotion



Note: Data for nondisabled adults is based on "Public Poll on Sports Participation" (2021) conducted by JSA.

Disability Sport Promotion Project (National Sport Life Survey for People with Disabilities) (JSA, 2022)

Figure 3-1 Number of Days that Adults Participated in Sport and Recreation in the past year

Project (National Sport Life Survey for People with Disabilities)" (2022) while the lower results are based on "Public Poll on Sports Participation" (2021), both conducted by the Japan Sports Agency (JSA).

The data indicates that 16.5% of adults with disabilities participated three or more days per week compared to 30.4% of nondisabled adults, while 14.6% of adults with disabilities participated one to two days per week compared to 26.0% of nondisabled adults. Using these two levels of participation as a standard for representing individuals who regularly engaged in sport and physical activities at least once a week, the total level of participation for adults with disabilities came to 31.1%, which is limited to about half of that for nondisabled adults of 56.4%. Even more striking is the fact that the percentage of individuals who did not participate in sport and physical activities was at least two times higher for adults with disabilities (41.3%) than nondisabled adults (19.9%). Regarding the results by types of disability for adults who participated in sport and physical activities at least one day a week, the percentage was approximately 30% for most types of disability (limb impairment (not requiring wheelchair), visual impairment, hearing impairment, intellectual disability, developmental disability, mental disorder and voice/language/masticatory dysfunction), while it was about 25% for limb impairment (requiring wheelchair).

Participation in Sport and Recreation by People with Disabilities by Types of Sport

Table 3-1 displays the types of sport and recreational activities performed by adults with disabilities in the past year, sorted by eight types of disability. "Walking" had the highest participation rate for all disability types, followed by "Strolling". "Calisthenics and light exercises", "Stair climbing/descending" and "Jogging/Running" were the top choices. In the category of "Limb impairment (requiring wheelchair)", it should be pointed out that "Rehabilitation involving physical activities", which is conducted as part of rehabilitation, ranked third.

Purposes of Participating in Sport and Physical Activities for People with Disabilities

Figure 3-2 shows the purposes of participating in sport and physical activities for people with disabilities based on one main purpose that respondents chose among the nine options. The two purposes of participating, "To maintain or promote health" (48.9%) and "To change the mood or relieve stress" (17.6%) together accounted for about 70%,

Table 3-1 Participation in Sport and Recreation for the past year by Disability Types (n=3,620)

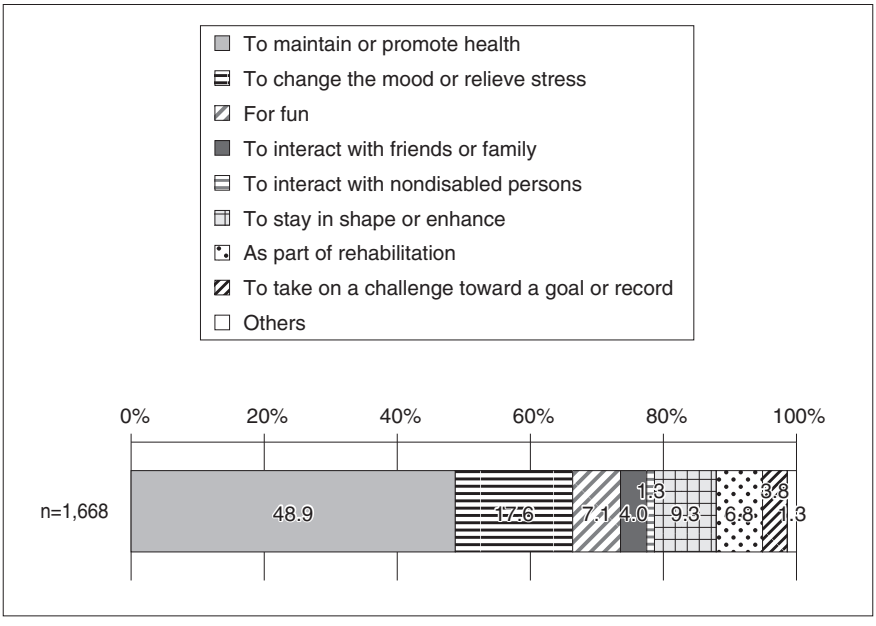
Limb Impairment [Requiring Wheelchair]			Limb Impairment [Not Requiring Wheelchair]			Visual Impairment			Hearing Impairment		
Rank	n=348	%	Rank	n=952	%	Rank	n=314	%	Rank	n=382	%
1	Walking	29.6	1	Walking	48.6	1	Walking	50.3	1	Walking	50.0
2	Strolling	17.5	2	Strolling	39.0	2	Strolling	34.4	2	Strolling	32.7
3	Rehabilitation involving physical activities	16.4	3	Stair climbing/descending	18.2	3	Jogging/Running	14.0	3	Stair climbing/descending	18.3
4	Jump rope	12.6	4	Calisthenics and light exercises	9.0	4	Stair climbing/descending	13.7	4	Jogging/Running	12.3
5	Stair climbing/descending	9.8	5	Jogging/Running	6.2	5	Jump rope	11.8	5	Calisthenics and light exercises	10.2

Intellectual Disability			Developmental Disability			Mental Disorder			Internal Disability		
Rank	n=285	%	Rank	n=366	%	Rank	n=878	%	Rank	n=386	%
1	Walking	45.6	1	Walking	50.8	1	Walking	56.6	1	Walking	53.1
2	Strolling	41.1	2	Strolling	40.4	2	Strolling	41.2	2	Strolling	48.4
3	Calisthenics and light exercises	17.5	3	Stair climbing/descending	16.9	3	Stair climbing/descending	16.7	3	Stair climbing/descending	23.1
4	Stair climbing/descending	12.3	4	Jogging/Running	14.8	4	Calisthenics and light exercises	12.1	4	Calisthenics and light exercises	14.5
5	Swimming (including walking and running in water)	10.2	5	Calisthenics and light exercises	10.9	5	Jogging/Running	11.2	5	Weight training (dumbbell/bodyweight)	8.0

Reference: SSF National Sports-Life Survey 2020			Reference:Public Poll on Sports Participation 2022		
Rank	n=3,000	%	Rank	n=20,000	%
1	Strolling	32.9	1	Walking	64.1
2	Walking	28.3	2	Calisthenics and light exercises	15.2
3	Calisthenics and light exercises	19.4	3	Training	14.4
4	Weight training	18.0	4	Stair climbing/descending	13.7
5	Jogging/Running	10.6	5	Running/Marathon/Ekiden road relay	12.8

Note 1: Use of a wheelchair is determined by whether one is required for daily life.
Note 2: SSF National Sports-Life Survey is a national survey of individuals who aged 18 and over.

Disability Sport Promotion Project (National Sport Life Survey for People with Disabilities) (JSA, 2022)



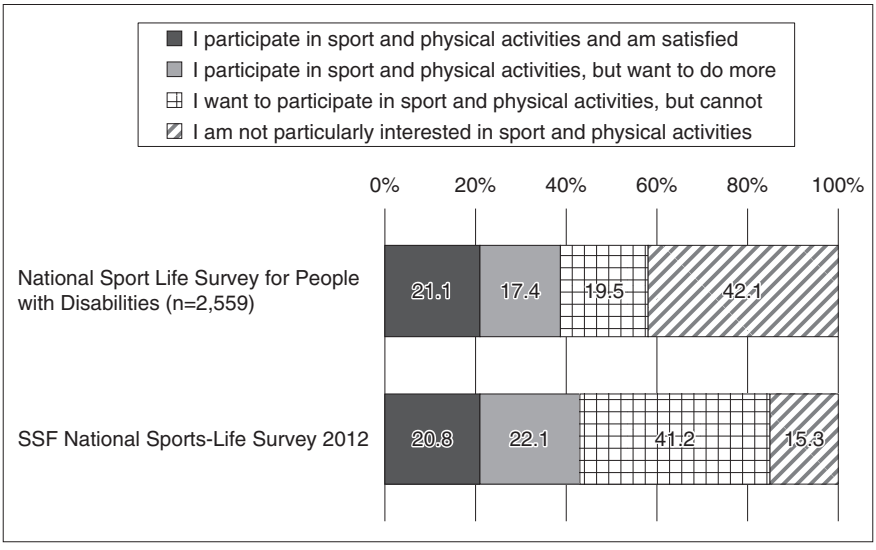
Disability Sport Promotion Project (National Sport Life Survey for People with Disabilities) (JSA, 2022)

Figure 3-2 Main Purpose of Participating in Sport and Physical Activities

followed by "For fun" (7.1%) and "To interact with friends or family" (4.0%). The JSA's survey "Public Poll on Sports Participation" showed a similar trend, with many respondents answering that participation in sport and physical activities was for their health, for the promotion and maintenance of physical fitness, for eliminating a lack of exercise, or for pleasure and fun.

Interest in and Satisfaction with Sport and Physical Activities for People with Disabilities

Figure 3-3 displays the current level of interest in and satisfaction with sport and physical activities among people with disabilities. "I am not particularly interested in sport and physical activities" received the highest number of response (42.1%), followed by "I participate in sport and physical activities and am satisfied" (21.1%) and "I want to participate in sport and physical activities, but cannot" (19.5%). Compared with results of the SSF National Sports-Life Survey (2012) of adults without disabilities, the percentage of individuals who reported "I am not particularly interested in sport and physical activities" was high among those with disabilities. In terms of whether or not individuals participated in sport and physical activities in the past year, 73.7% of those who did



Disability Sport Promotion Project (National Sport Life Survey for People with Disabilities) (JSA, 2022)

Figure 3-3 Current Participation in Sport and Physical Activities

not participate responded that they were "not particularly interested in sport and physical activities", which was about three times the percentage among those who participated.

Participation in Sport and Physical Activities by Children and Young People with Disabilities

According to the "Disability Sport Promotion Project (National Sport Life Survey for Children and Adults with Disabilities)" (2022) conducted by the JSA, among children and young people with disabilities aged between 7 and 19 who participated in sport and physical activities in the past year, 18.9% of those participated in sport and physical activities three or more days per week while 22.8% participated one or two days per week. The percentage of those with disabilities in this age group who participated in sport and physical activities at least one day per week came to 41.7%, compared to 26.9% who responded that they did not participate at all. Regarding the types of sport and physical activities conducted in the past year, "Walking" was the most popular at 36.6%, followed by "Strolling" (31.9%) and "Jump rope" (30.5%). "Walking," "Strolling," "Jump rope" and "Calisthenics and light exercises" had high participation rates for all disability types.

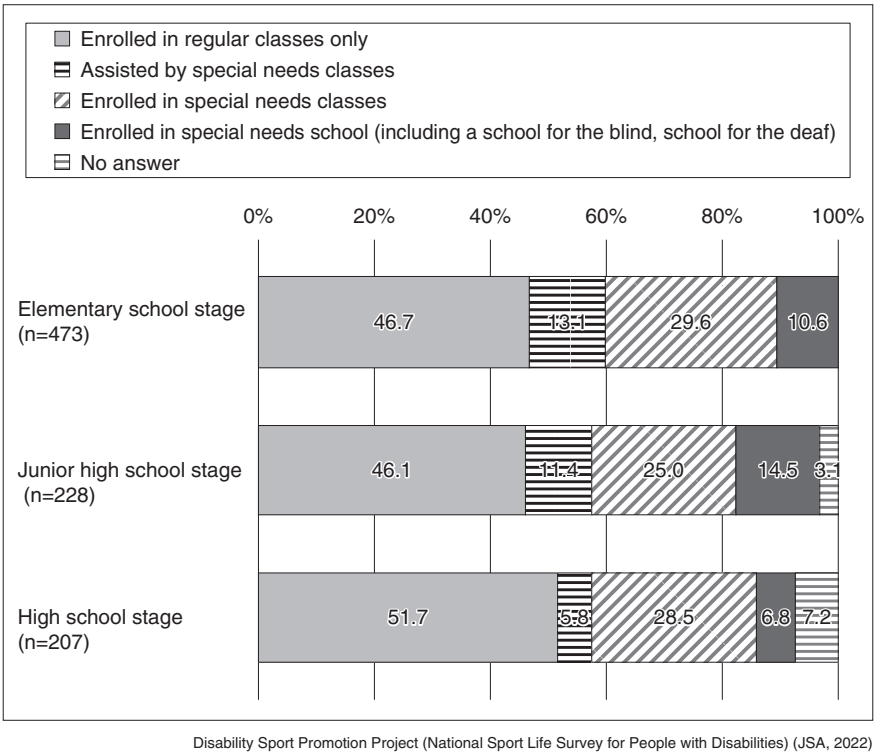
2. Current Status and Issues of Inclusive Physical Education

Current Status and Issues of Children and Young People with Disabilities in School Physical Education

The above survey also asked students about the types of schools and the status of school physical education, and the school types were categorized into "Enrolled in regular classes only", "Assisted by special needs classes", "Enrolled in special needs classes" and "Enrolled in a special needs school (including a school for the blind, a school for the deaf)" by educational stage of elementary, junior high and high schools. Results by school types show that between 40 and 50% of respondents were "Enrolled in regular classes only" for all educational stages (Figure 3-4). Regarding participation in school physical education, the highest percentage of students "participated almost every time" for any educational stages.

Reasons for Not Participating in Physical Education

The common reasons given by students who answered that they "did not participate at all", "could not participate most of the time" and



Disability Sport Promotion Project (National Sport Life Survey for People with Disabilities) (JSA, 2022)

Figure 3-4 Types of Schools in which Students Enrolled

"participated for about half of the time" in school physical education were: "Because the type of activity was difficult for me to participate in", "Because I thought I would cause trouble to other students" and "Because my supervising teacher did not ask me to participate" rather than medical reasons of "Because my doctor advised me not to". These results reflected the lack of acknowledgement for the concept of adapted sports of considering having children and young people participate in physical education even when challenged with disabilities in the field. These findings suggest that not only physical education teachers at special needs schools but also those at elementary, junior high and high schools need basic knowledge and practical skills in physical education instruction for those with disabilities.

II. Sport Facilities for People with Disabilities

1. Sport Centers for People with Disabilities

Sport centers for people with disabilities allow people with disabilities to have exclusive or priority access. These centers are equipped with a range of facilities, such as gymnasiums, swimming pools, playgrounds and training rooms, which have been designed to be more easily used by people with disabilities. The SSF "Research on Sports Facilities for People with Disabilities" (2022) reported that there were 150 such facilities in Japan in 2021. Of these, 85.5% of facilities are equipped with gymnasiums, 45.5% with training rooms, 41.8% with swimming pools, 27.3% with multi-purpose rooms, 26.4% with sound table-tennis rooms and 18.2% with archery ranges.

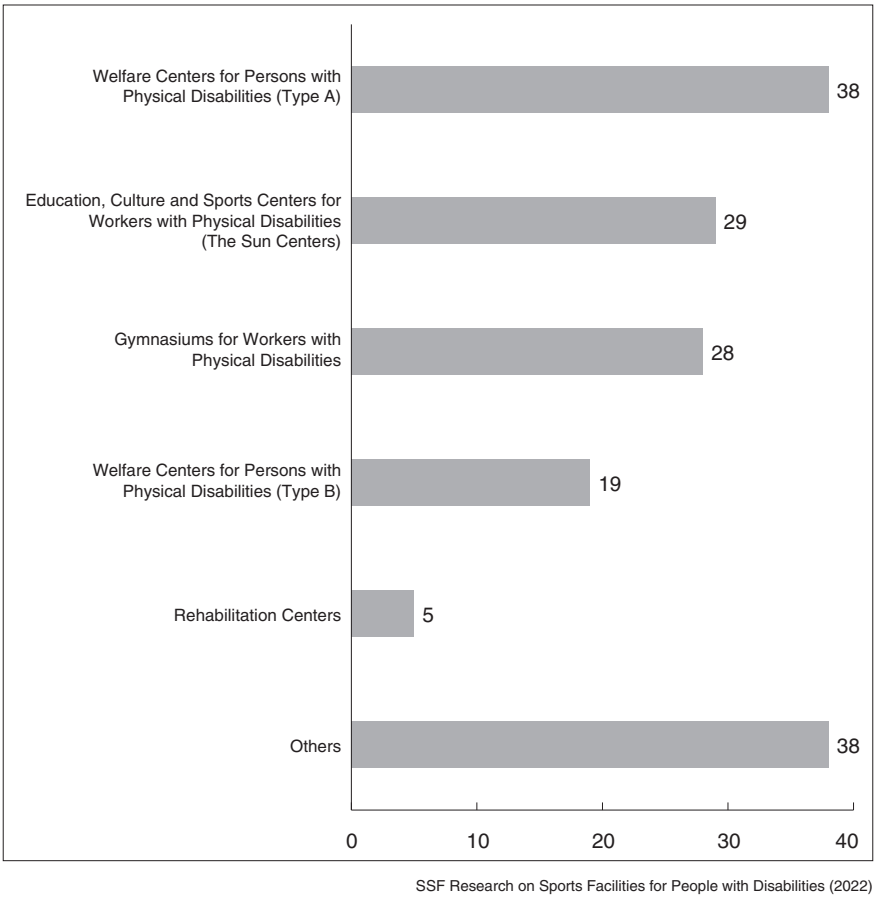
Along with universal design features, such as the elimination of steps, the installation of braille blocks and barrier-free restrooms, to accommodate the needs of people with disabilities, these facilities also offer a variety of information resources to assist people with disabilities. Such resources 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 sport, as well as full-time disability sport instructors are available in most of the centers, which often serve as a community hub for disability sport activities.

Based on the background purposes for their establishment, sport centers for people with disabilities can be divided into the following seven types (Figure 3-5). By March 2006, all type 2 and type 3 facilities were transferred to municipalities and they are currently being managed by the Council of Social Welfare and social welfare corporations and organizations.

1. Welfare Centers for Persons with Physical Disabilities (Type A)
   Facilities specified in the Act for the Welfare of Physically Disabled Persons, aimed at supporting social participation of persons with physical disabilities.
2. Gymnasiums for Workers with Physical Disabilities
   Facilities formerly known as "Gymnasiums for Workers with Physical Disabilities" were established in 1961 by the Employment Promotion Corporation, with the aim of improving welfare and more stable employment of workers with physical disabilities.
3. Education, Culture and Sports Centers for Workers with Physical Disabilities (The Sun Centers)

Facilities formerly known as "Education, Culture and Sports Centers for Workers with Physical Disabilities (The Sun Centers)" were also established by the Employment Promotion Corporation, with the aim of making use of available facilities to improve the physical functions, physical fitness, communication, education and cultural welfare of workers with physical disabilities.

4. Welfare Centers for Persons with Physical Disabilities (Type B)
   Welfare centers as defined by the Act on Welfare of Physically Disabled Persons that are at least 424 square meters in size and offer creative activities, opportunities to be productive, encouragement to interact with the world, volunteer training and other services that will help people with physical disabilities participate in society.



SSF Research on Sports Facilities for People with Disabilities (2022)

Figure 3-5 Number of Sport Facilities with Exclusive or Priority Access for People with Disabilities by Categories

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

2. Usage of Sport Facilities with Exclusive or Priority Access for People with Disabilities

The method each sport facility with exclusive or priority access for disabled people uses to calculate visitor numbers varies; 47.2% of these facilities determine it by totaling the number of individuals who complete the sign-up process at the reception desk, while 44.4% count for the number of users of each section of the facility. All of the facilities that had over 100,000 total visitors (including people with disabilities) in 2019 are located in major cities and are ranked as follows, from most visitors to least (Table 3-2): Osaka City NAGAI Sports Center for Persons with Disabilities; Yokohama Rapport Sports & Cultural Center for Disabled; Osaka City MAISHIMA Sports Center for Persons with Disabilities (Amity Maishima); Tokyo Metropolitan Sports Center for the Disabled; and Saitama Social Activities Center for the Disabled. All the

Table 3-2 Sport Facilities with Exclusive or Priority Access for Disabled People with more than 100,000 users (2018 - 2020)

Name of facilities	2018	2019	2020
Osaka City NAGAI Sports Center for Persons with Disabilities	232,786	210,727	29,055
Yokohama Rapport Sports & Cultural Center for Disabled	211,658	188,003	64,758
Osaka City MAISHIMA Sports Center for Persons with Disabilities (Amity Maishima)	162,144	140,617	25,221
Tokyo Metropolitan Sports Center for the Disabled	108,920	126,026	5,681
Saitama Social Activities Center for the Disabled	136,812	123,659	24,877

Note: The facilities were listed according to the ranking of the number of users (more than 100,000) in 2019 due to the COVID-19 pandemic in 2020.

SSF Research on Sports Facilities for People with Disabilities (2022)

top ten facilities with the highest number of users with disabilities in 2019 experienced a significant decrease in the number of them in 2020.

3. Sport Facilities with Exclusive or Priority Access for People with Disabilities during the COVID-19 Pandemic

While the restrictions imposed by the COVID-19 pandemic, such as the declaration of the state of emergency and priority measures to prevent the spread of the COVID-19 infections, varied by region and time, the temporary closures of facilities and restrictions on their use affected the number of users. Since 2012, the total number of facility users had hovered around 7 to 8 million persons and the number of users with disabilities around 2.5 million. However, both dropped by half in 2020 due to the COVID-19 pandemic. The rate of decline in usage from 2019 to 2020 was down 54.1% in the total number of users, down 59.2% in the number of users with disabilities and down 80.3% in the number of users with multiple disabilities. Tokyo Metropolitan Sports Center for Persons with Disabilities and Tokyo Tama Sports Center for Persons with Disabilities both saw declines of more than 90%. Four of the top five facilities in terms of the rate of decline were in Tokyo and Osaka, and the decline rate was higher for larger cities with a larger number of COVID-19 cases, due to more closures of facilities and restrictions on their use. Furthermore, it can be inferred that people with disabilities with a higher risk of facing severe illness were more likely to avoid using facilities, resulting in that people with multiple disabilities refrained from using the facilities.

III. High Performance Measures for Paralympic Sport

The Japanese Para Sports Association (JPSA) listed "Strengthen the system for promoting a virtuous cycle that disseminate para sports and improving their competitive strength" as an issue in the JPSA's 2030 Vision: For the achievement of vigorous, inclusive society (2022). The Japanese Paralympic Committee (JPC) formulated the JPC Strategic Plan (2022) to promote integrated activities for improving athletic performance and the Paralympic Movement and to clarify its mission.

1. Review of the 2020 Tokyo Olympic and Paralympic Games

Under the policy to support the enhancement of high performance sport announced in October 2016, a joint team was established based on a decision by the Strategic Headquarters of the High Performance Sport Center of the Japan Sport Council (JSC). The JPC has been conducting collaborative consultation on the medium- to long-term strategic reinforcement plans formulated by each national federation and has been providing advice and verification on their planning and implementation. In collaboration with the JSC and the Japanese Olympic Committee (JOC), the JPC has provided advice and cooperation on the management of the National Training Center (NTC), including the NTC East which began operation in September 2019, and has also worked to put in place the foundation from intangible aspects, such as the appointment of national team staff, arranging athlete subsidies and employment of athletes. The JPC concludes that increasing the budget for reinforcement initiatives has led to the improvement of athletic performance, and that enhancing the government's reinforcement support program has led to positive results. Future challenges are to maintain the budget for reinforcement initiatives, further improve the environment for athletes and coaches and identify and develop athletes, including women, to further enhance high performance sport and strengthen the governance of sports organizations.

2. Mission of the Japanese Paralympic Committee

The missions of the JPC are as follows: (1) identify, develop and strengthen para-athletes who can demonstrate world-class athletic performance and resourcefulness, including from the perspective of setting dual and second career paths; (2) send the Japanese national team to the Paralympic Games and other events to help the Japanese national team athletes demonstrate top performance; (3) publicize images of para-athletes who excel in the world to society to increase para-sports fans and encourage people to change their perceptions of disability; and (4)

instill in the country the appeal of para-athletes and the value of para-sports, which can make people realize that everyone can be on the same starting line if they recognize diversity and use ingenuity. To achieve these missions, measures will be implemented in collaboration and cooperation with national federations, the government, businesses, welfare and medical institutions, research institutions, educational institutions, media organizations and others.

(1) Strengthening top athletes

The goal is to maximize the number of gold medals, total medals and medal-winning sports at the 2028 Summer Paralympic Games and the 2030 Winter Paralympic Games. Steps will be taken to maximize outcome by setting the following initiatives as pillars of the strategy: provide support for sending athletes to international competitions, strengthen medal winning in high-priority sports, and strengthen medal potential athletes (MPAs).

(2) Identifying and developing athletes

In order for Paralympic sports-related organizations to identify and nurture athletes based on pathways and numerical targets, the goal is to have at least 70% of Paralympic sports organizations engage in this effort by 2025 and all Paralympic sports organizations to do so by 2030. Athletes will be identified and developed through constructing JPC athlete development pathways and national federation athlete development pathways, developing female athletes, and examining measures for growth in MPAs.

(3) Strengthening the organizational strength of JPC-member national federations

In order for JPC-member national federations to achieve the management indicator targets newly set, efforts will be made to strengthen organizational capabilities so that 70% of JPC-member national federations can achieve the targets by 2025 and all JPC-member national federations can achieve them by 2030.

3. Assignment of Coaches and Staff to Supervise Reinforcement Activities

Coaches and staff who are able to supervise the overall reinforcement activities based on the medium- and long-term strategic reinforcement plans of national federations are assigned to the national federations for the Paralympic Games and the JPC to effectively promote the development and strengthening of athletes. Positions such as high-performance director, national head coach, national team coach and national team staff were

established based on the policies to enhance international competitiveness, the annual business plan and individual annual achievement goals (quantitative and qualitative) formulated by national federations. The high-performance director is responsible for overall athlete development activities, including planning, drafting and formulating medium- to long-term strategic reinforcement plans, and serves as the chairperson of the reinforcement committee, general manager of the reinforcement department or such like as the person in charge of reinforcement. The high-performance manager, who is in charge of athlete enhancement at the JPC, will share information and collaborate with the high-performance directors of the member national federations to effectively promote the reinforcement initiatives and carry out activities aimed at improving international competitiveness.

4. J-STAR Project

The J-STAR project was launched in 2017 as a way to identify and develop the top athletes of the future who will excel in world-class competitions such as the Olympic and Paralympic Games. In the beginning of the project, only five Paralympic sports were covered, but since 2020, the Japanese Para Sports Association (JPSA) has coordinated the project to cover all 28 sports that are part of the Summer and Winter Paralympic Games. After applying for entry, potential athletes take part in a basic measurement session held in each region and are checked for basic athletic skills as well as the type and degree of disability. In Paralympic sports, athletes are allowed to participate in different sports and classes depending on the type and degree of disability, but during the basic measurement session, they will be able to discuss which sports they can participate in with the expert members of the JPSA Medical Committee's Classification Committee and will also be given the opportunity to consult with the National Governing Bodies of Sport. Persons selected through the subsequent process will be able to participate in a verification program run by instructors of the National Governing Bodies of Sport. Athletes who are deemed promising in the program will have the opportunity to continue their training in each national federation's reinforcement and development courses. Over the past five years (2017 to 2021), the total number of entries in the Paralympic sports came to 889. The results of the J-STAR project are steadily showing, with four participants in the Tokyo 2020 and nine participants in the Bahrain 2021 Asian Youth Para Games, winning nine medals including four gold medals.

IV. The Nippon Foundation Parasports Support Center

1. Overview

Following the decision to host the Tokyo 2020 Paralympic Games, the Nippon Foundation established the Nippon Foundation Paralympic Study Group in June 2014 with the aim of broadly considering how to handle the Paralympics. One of the issues raised was the management structure of national federations. Established by the Nippon Foundation in May 2015, the Nippon Foundation Paralympic Support Center ("Parasapo") aims to strengthen the foundation of national federations for Paralympic sports by providing various types of support. Parasapo provides a co-working office with Paralympic national federations in the Nippon Foundation Building, grants for administrative staff costs and funding for increasing public engagement in sports as well as a promotion and marketing budget. It also provides shared back-office services, such as accounting and administrative processing, to strengthen organizational management. It was renamed as "The Nippon Foundation Parasports Support Center" in January 2022.

Furthermore, under the slogan of "SOCIAL CHANGE with SPORTS", an education program "Asu-Challe! (Challenge for Tomorrow)" with para-athletes serving as instructors is held across the country in an aim to realize a diversity and inclusion society. This "Asu-Challe!" program is designed to target students in primary, secondary and special-needs schools as well as provide training seminars for businesses, organizations, communities and universities, in both cases with para-athletes or persons with disabilities serving as lecturers. By 2022, more than 3,800 programs had been hosted, with over 400,000 children and adults having participated in Japan and abroad.

2. Operation of the Nippon Foundation Para Arena

The Nippon Foundation Para Arena, which opened in June 2018 as a dedicated gymnasium for para-athletes to improve their training environment, is used for training by club teams and individuals belonging to the Japanese national Paralympic team and para-sports national federations. In April 2020, the arena was offered as part of the Nippon Foundation Disaster Crisis Support Center due to the COVID-19 pandemic. It resumed operation in April 2021. With input from para-athletes, the entire facilities were universally designed for use by everyone and the total number of users has exceeded 40,000 to date.

3. "I'mPOSSIBLE" (Japanese version)

In collaboration with the Japanese Paralympic Committee (JPC) of the Japanese Para Sports Association, Parasapo produced a Japanese version of "I'mPOSSIBLE," a global Paralympic education program developed by the International Paralympic Committee (IPC) and distributed it to schools throughout the country as part of its promotion activities in Japan. Parasapo also contributed funds to support the IPC in establishing the "I'mPOSSIBLE Award", which is presented to schools and Paralympians who have made significant contributions to achieving an inclusive world through the Paralympic Movement. The award ceremony was held at the closing ceremony of the Tokyo 2020 in September 2021. The promotion activities of these materials by Parasapo were completed in December 2021, and the JPC is currently in charge of the promotion activities for teaching materials.

4. Dissemination and Awareness of the Paralympics and Academic Research

With the aims of expanding interest in Paralympics and para-sports and increasing the number of para-sports fans, the attractive features of sports and athletes, and information about competitions and events are disseminated through the website media "Parasapo WEB" and official SNS.

Parasapo also conducts academic research and social surveys on Paralympics and para-sports, publishes a journal to announce the results of such research, and holds symposiums in collaboration with universities and research institutes on a regular basis.

Chapter 4
Human Resources for Sport

I. Professions in Sport

1. Human Resources in Local Sport Administration

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

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

In addition to staff members who are in charge of sport 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 Sport Organizations

There are various sport organizations across Japan. With a few exceptions, the national governing bodies of sport (NGBs) serve as the main administering body of each sport, and have a number of affiliated organizations including prefectural associations. To understand the current number of staff members in NGBs who are engaged in the promotion of each sport, the results of the "SSF Survey of the National Governing Bodies of Sport" (2022) were examined. The subjects of the survey were 93 sports organizations that were affiliated organizations of either Japan Sport Association (JSPO), Japanese Olympic Committee (JOC) or Japan World Games Association (JWGA).

Staff members in National Governing Bodies of Sport (NGBs)

NGBs were asked for the number of staff members in each of the following positions: directors (full-time and part-time), auditors, councilors, regular employees, contract/commissioned workers, seconded employee (from sponsor companies, etc.), temporary workers, part-time workers, interns and others. The total number of staff members in the 77 organizations that responded to the survey was 4,308 people. Of this number, 1,679 were directors (including auditors), 1,439 were councilors

Table 4-1 Number of Staff Members in National Governing Bodies of Sport

Type	Men	Women	Total
Director (full- time)	101	39	140
Director (part-time)	1,044	332	1,376
Auditor	134	29	163
Councilor	1,262	177	1,439
Full-time employee	440	303	743
Contract/commissioned worker	91	78	169
Seconded employee	41	14	55
Temporary worker	3	57	60
Part-time worker	23	68	91
Intern	2	2	4
Others	38	30	68
Total	3,179	1,129	4,308

Note: The results show the total number of staff members are in 77 affiliated organizations of JASA, JOC or JWGA that responded to the survey.

SSF Survey of the National Governing Bodies of Sport (2022)

and 1,190 were operating staff members (Table 4-1).

The average number of operating staff members (excluding directors and councilors) was 15.5 persons per organization. However, this number varied depending on the organization. For example, some organizations had no operating staff members, while another had 272. With regard to those organizations that had no operating staff members (six organizations), it is assumed that the directors worked in various positions.

By gender, the proportion of men working as operating staff members was slightly higher, accounting for 53.6% of the total while women made up the remaining 46.4%. Looking at the employment status of those operating staff, excluding directors and councilors, 62.4% were regular employees, 32.9% were non-regular employees (such as contract/commissioned workers, temporary workers and part-time workers) and 4.6% were temporarily seconded employees from other companies including sponsors and suppliers.

The average number of directors was 21.8 persons per organization, and 8.3% of these were full-time directors. By gender, male directors accounted for 76.2% of the total and female directors accounted for 23.8%, showing that female directors remained around 20%. Among the respondents, three organizations (3.9%) did not have any female directors present, and those that had two or fewer female directors accounted for 20.8% of the total respondents.

II. Sport Instructors

1. Sport Instructor Qualification Scheme

Japan's Sport 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 sport 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 Sport Association (JSPO) 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 JSPO, NGBs and National Recreation Association of Japan) 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 JSPO 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. JSPO Sport Instructor Qualification Scheme

Table 4-2 shows the five categories and 18 different types of qualifications, except for "Former Qualifications", that are offered by JSPO. With the cooperation of NGBs, JSPO provides "Qualifications of Instructors for each Competition" which are intended to train instructors

Table 4-2 Number of Registered JSPO Certified Sports Instructors

Category	Title	Number of Registered Instructors	
		2019	2022
Basic Qualifications of Sports Instructors	JSPO Sports Basic Leader	394,006	428,912
	JSPO Coaching Assistant	-	15,695
Qualifications of Instructors for each Competitions	JSPO Start Coach	-	11,749
	JSPO Coach I	117,371	119,500
	JSPO Coach II	11,669	10,583
	JSPO Coach III	21,172	24,832
	JSPO Coach IV	6,410	6,977
	JSPO Instructor I	3,124	2,730
	JSPO Instructor II	1,130	982
Fitness Regime Qualifications	JSPO Sports Programmer	3,307	3,137
	JSPO Fitness Trainer	439	418
	JSPO Junior Instructor	4,352	4,453
Medical Conditioning Qualifications	JSPO Athletic Trainer	4,139	5,002
	JSPO Sports Doctor	6,209	6,309
	JSPO Sports Dentist	476	667
	JSPO Sports Dietician	374	464
Sports Management Qualifications	JSPO Assistant Club Manager	5,466	5,695
	JSPO Club Manager	382	376
Former Qualifications	Sports Trainer I	21	17
	Sports Trainer II	49	39
Total (excluding sports basic leaders)		186,090	219,625
Total (including sports basic leaders)		580,096	648,537

As of October 1, 2022 JSPO (2019 and 2022)
Note: JSPO Coaching Assistant and JSPO Start Coach were officially recognised from April 2020.

of each sport and are composed of six types of qualifications according to their age and level of skills. To date, JSPO has trained instructors in over 50 different types of sport.

The "Fitness Regime Qualifications" include: "JSPO Sports Programmer" which is a qualification to offer guidance for the maintenance and improvement of fitness to adults; "JSPO Fitness Trainer" which is for professional fitness instructors to provide various basic fitness training at commercial sport facilities; and "JSPO Junior Instructor" which is a qualification to teach children about physical fitness and motion facilitation through play at local sport clubs.

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

The "Sports Management Qualifications" are targeted at individuals who are involved in the management of comprehensive community sports clubs. The "JSPO 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 "JSPO 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 sport clubs.

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

Number of Registered Instructors

As of October 2022, there were 648,537 qualified instructors registered with JSPO (Table 4-2). The number of those registered as "JSPO 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 2022 increased by about 33,000 people, when compared to that number in 2019. This was

Table 4-3 Number of Registered JSPO Certified Sports Instructors per Sport

Sport	Number of Registered Instructors	
	2019	2022
Football	38,683	41,129
Volleyball	17,773	19,749
Swimming	16,837	15,591
Softball	12,535	13,095
Basketball	11,269	12,698
Kyudo (Japanese Archery)	6,358	6,311
Track and Field	4,756	5,559
Karate	5,035	4,614
Tennis	4,545	3,920
Table tennis	3,176	3,244
⟩		
Total	160,876	167,910

As of October 1, 2022 JSPO (2019 and 2022)

due to recognition of two new categories, "JSPO Coaching Assistant" and "JSPO Start Coach", since 2020.

By sport, the number of registered instructors was highest for "Football" (41,129), followed by "Volleyball" (19,749), "Swimming" (15,591) and "Softball" (13,095) (Table 4-3).

3. Disability Sport Instructor Qualification Scheme

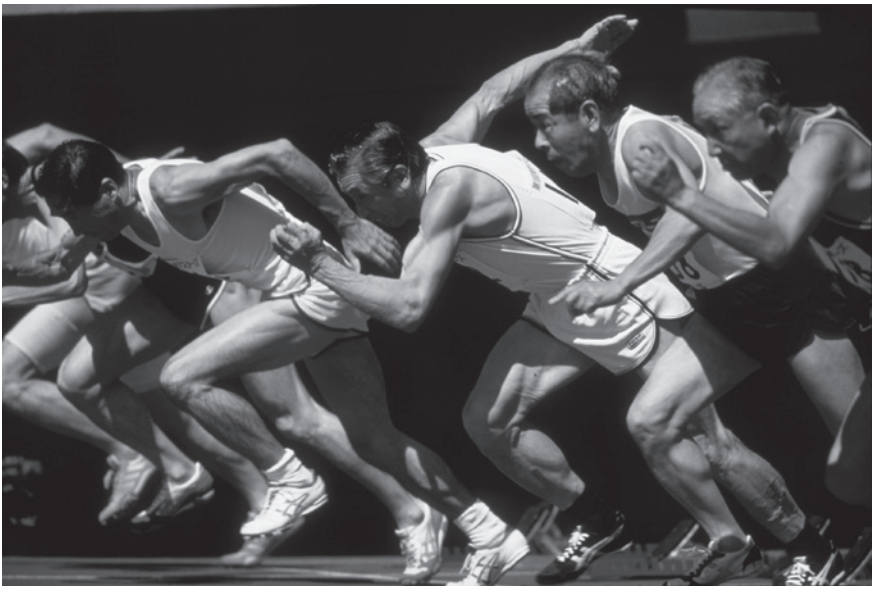
The Japanese Para-Sports Association (JPSA) has established the "Para-Sports Instructor Qualification Scheme" to train and certify six types of instructors in order to accommodate the participation of people with disabilities in various sport activities. The "Beginner's Para-Sports Instructor" is to help people with disabilities within the community to integrate sport into their daily lives; "Intermediate Para-Sports Instructor" can provide sport instruction to people with disabilities at a prefectural level; "Advanced Para-Sports Instructor" provides advanced sport 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 sport. 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 4-4).

Table 4-4 JPSA Certified Sports Instructor Qualifications

Category	Number of Registered Instructors	
	2019	2022
Beginner's Para-Sports Instructor	22,025	21,450
Intermediate Para-Sports Instructor	3,992	4,209
Advanced Para-Sports Instructor	861	888
Sports Coach	182	211
Para-Sports Physician	568	616
Para-Sports Trainer	207	233

As of March 31, 2023 JPSA (2019 and 2022)
Note: Sports coaches include those certified as Advanced and Intermediate Para-Sports Instructors.



Chapter 5
Sport Clubs

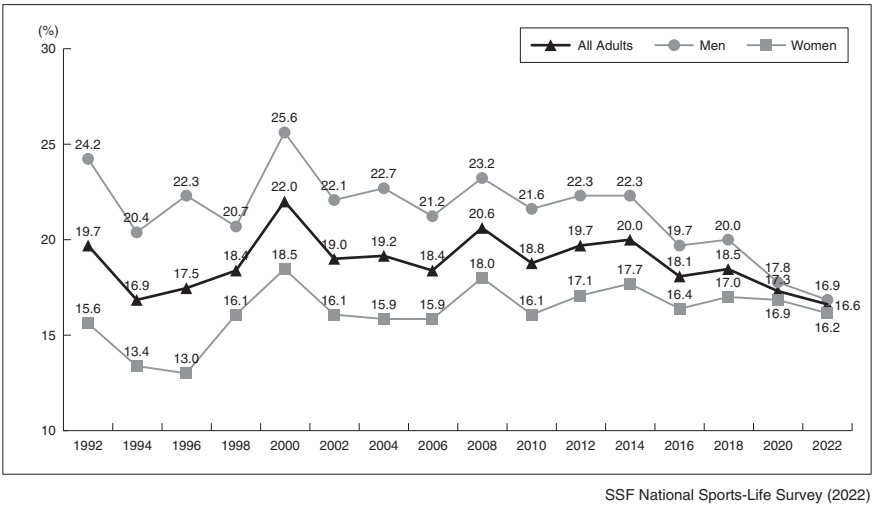
I. Sport Club Memberships for Adults

1. Membership Trends and Types of Sport Clubs

Membership Trends

According to "The 2022 SSF National Sports-Life Survey", the percentage of adults who were enrolled in a sport club, team or group (hereinafter collectively referred to as a "sport club") at the time of the survey, was only 16.6% (Figure 5-1). In 1992 when the survey began, the membership rate was 19.7%, declining to 16.9% in 1994 before continuing to rise to 22.0% in 2000. It then declined again to 18.4% in 2006, but has remained flat overall. Starting at 20.0% in 2014, it has been a declining again to 18.1% in 2016, 18.5% in 2018 and 17.3% in 2020, then reaching 16.6% in 2022, the lowest rate since the first survey.

With regard to gender, the proportion of men who were enrolled in a sport club at the time of the survey was 16.9% and the proportion of women was 16.2%, showing little difference by gender (Figure 5-2). Conversely, in terms of those who had never enrolled in any sport clubs, the proportion of women was 3.9 percentage points higher (61.4%) than the proportion of men (57.5%).



SSF National Sports-Life Survey (2022)

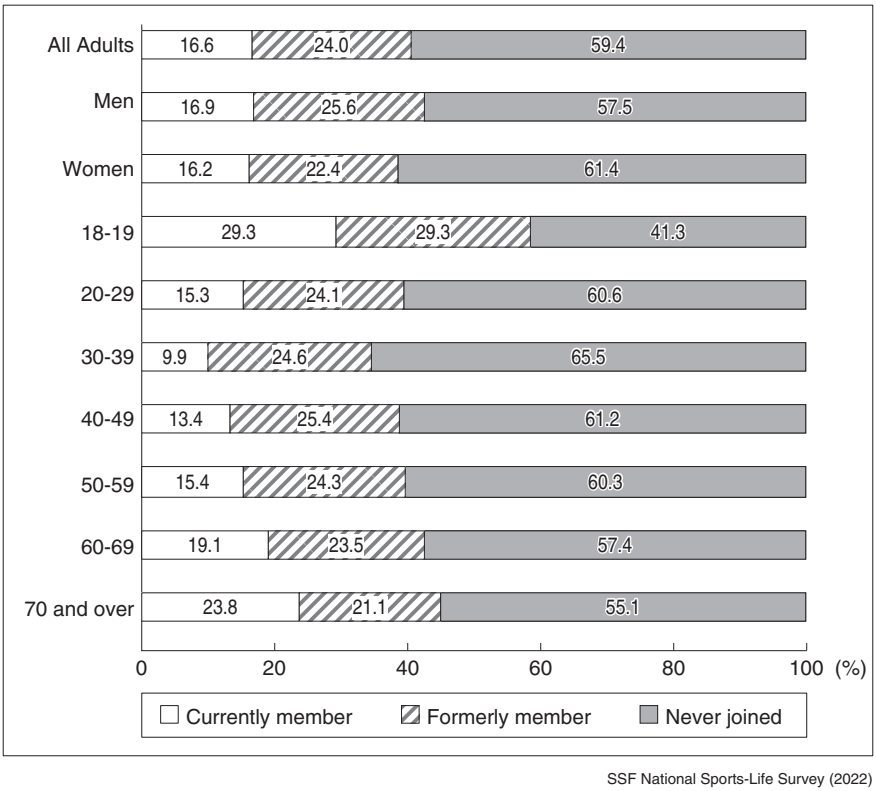
Figure 5-1 Trends in the Rate of Sport Club Memberships

By age groups, the 18-19 age group showed the highest membership rate of 29.3%, followed by the 70 and over age group with 23.8%, the 60-69 age group with 19.1%, the 50-59 age group with 15.4%, the 20-29 age group with 15.3%, the 40-49 age group with 13.4% and the 30-39 age group with 9.9%. In terms of those who had never enrolled in any sport clubs, the 30-39 age group had the highest non-membership rate of 65.5%.

Membership Status by Types of Sport Clubs

Regarding the types of sport clubs that adults participated in, the most popular clubs were "Local community clubs (mostly managed by local residents)" at 30.8%, followed by "Friends and acquaintances' clubs", "Private sport clubs and fitness clubs", "Workplace clubs" and "Alumni clubs".

By gender, the proportion of women who were members of "Private sport clubs and fitness clubs" was 19.0 percentage points higher (34.0%) than men (15.0%). The same trend was observed in "Local community



SSF National Sports-Life Survey (2022)

Figure 5-2 Membership of Sport Clubs

clubs", with women (32.8%) leading men (28.9%) by 3.9 percentage points. By age, the proportion of "Local community clubs" was higher among the 60-69 age group (39.8%) and among the 70 and over age group (39.2%). In contrast, the proportion of "Workplace clubs" was higher among the 20-29 age group (21.1%) and among the 30-39 age group (23.3%). In addition, the proportions of the 50-59 and 60-69 age groups who were members of "Private sport clubs and fitness clubs" were higher than those of other age groups, at 32.1% and 32.3%, respectively.

Among respondents who were not currently enrolled in any sport clubs, the proportion of those who would like to become a sport club member was 15.2%. This figure has decreased by 4.3 percentage points from 19.5% in 2016, but increased by 1.3 percentage points from 13.9% in 2020. By gender, the proportion wanting to enroll in a sport club was higher in women with 16.7% than men with 13.8%. Compared to 2020, it increased by 1.8 percentage points for men and 1.0 percentage points for women.

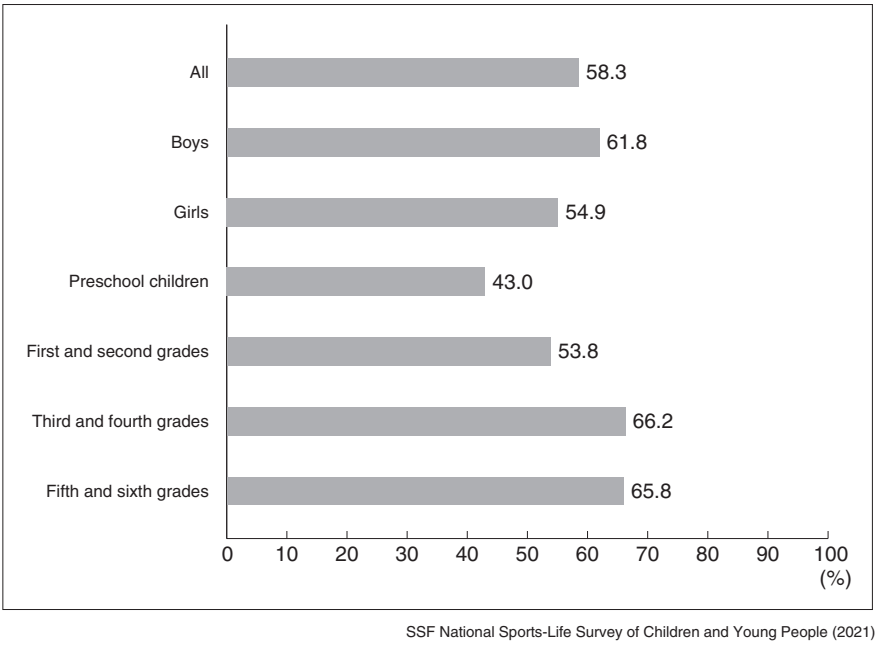
II. Participation in Sport Clubs and School Sport Clubs by Children and Young People

1. Sport Club Memberships for Children Aged 4-11 Years

In "The 2021 SSF National Sports-Life Survey for Children and Young People, children aged 4-11 years were asked about their enrollment in school sport clubs, private sport clubs (such as swimming and gymnastic clubs) and community sport clubs (junior sport clubs, sport classes, etc.).

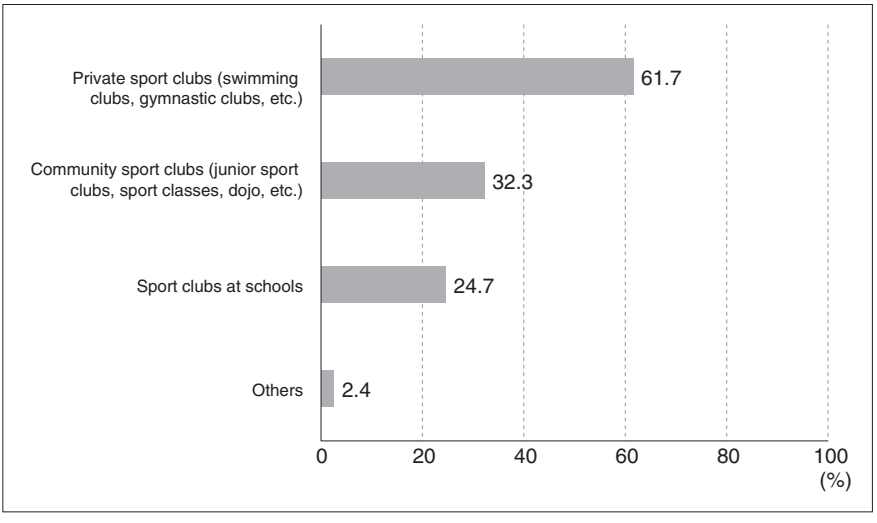
The enrollment rate for children aged 4-11 was 58.3%, as indicated in Figure 5-3. Regarding gender, 61.8% of boys were enrolled compared to 54.9% of girls, a difference of 6.9 percentage points. Although this gender disparity in enrollment rates was nonexistent among preschool children, it was significant for elementary school students. In terms of school year, 43.0% of preschool children, 53.8% of first and second grades, 66.2% of third and fourth grades and 65.8% of fifth and sixth grades were enrolled, peaking in the third and fourth grades and increasing as the grades increased. Over half of elementary school students were enrolled in sport clubs.

Regarding the results by types of sport club, "Private sport clubs (swimming clubs, gymnastic clubs, etc.)" showed the highest rate with 61.7%, followed by "Community sport clubs (junior sport clubs, sport



SSF National Sports-Life Survey of Children and Young People (2021)

Figure 5-3 Membership in Sport Clubs among Children Aged 4-11 years



SSF National Sports-Life Survey of Children and Young People (2021)

Figure 5-4 Types of Sport Clubs for Children Aged 4-11 years (Multiple Answers)

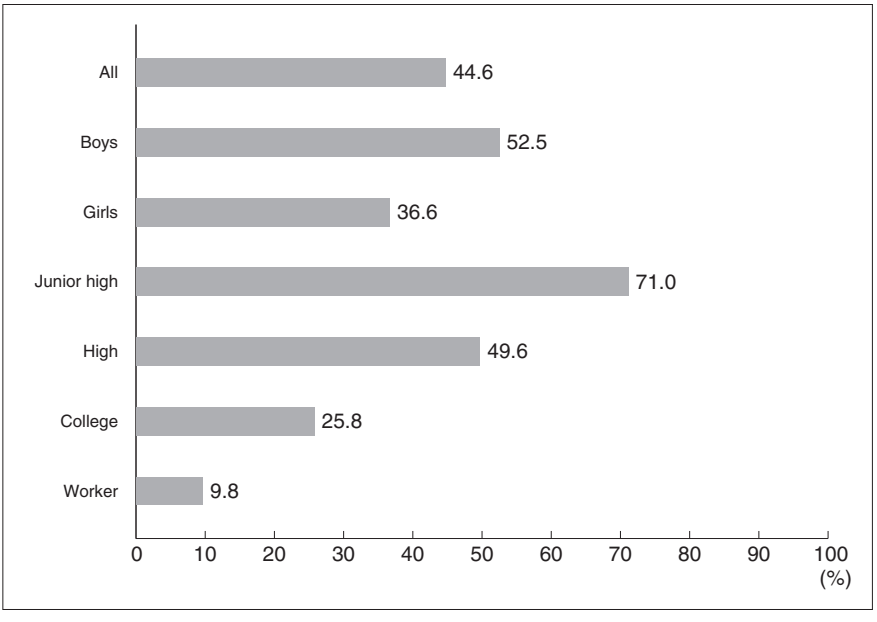
classes, dojo, etc.) with 32.3% and "Sport clubs at schools" with 24.7% (Figure 5-4). The data suggests that private sport clubs are an important activity location for children in this age group.

2. Sport Club Memberships for Young People Aged 12-21 Years

According to "The 2021 SSF National Sports-Life Survey for Children and Young People", 44.6% of young people aged 12-21 years were members of sport clubs (in school sport clubs, local community clubs such as junior sport clubs, and private sport clubs such as swimming and gymnastic clubs) in 2021 (Figure 5-5).

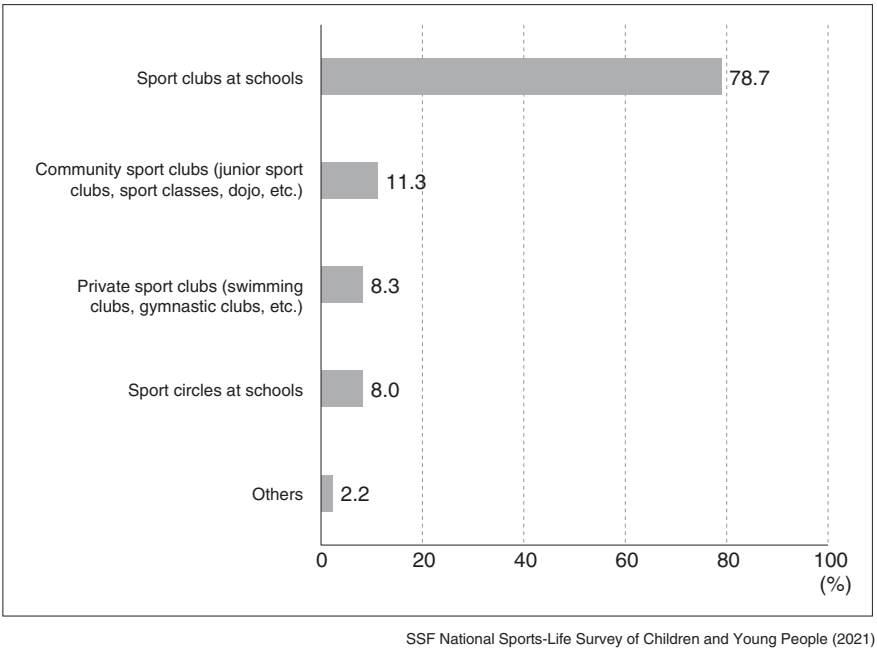
By gender, boys accounted for 52.5% of sport club members, while girls accounted for 36.6%, showing a difference of 15.9 percentage points, which is bigger than a difference among children aged 4-11 years. By school year, the highest membership rate was found in junior high school years at 71.0%. The membership rate decreased to 49.6% in high school years and then 25.8% in college years. It can be said that high school years are a turning point for young people in terms of joining sport clubs. Moreover, the membership rate in young workers was significantly low, at 9.8%.

Regarding types of sport clubs, "Sport clubs at schools" ranked the highest at 78.7%, followed by "Community sport clubs (junior sport clubs, sport classes, dojo, etc.)" at 11.3% and "Private sport clubs (swimming clubs, gymnastic clubs, etc.)" at 8.3% (Figure 5-6).



SSF National Sports-Life Survey of Children and Young People (2021)

Figure 5-5 Membership in Sport Clubs among Young People Aged 12-21 years



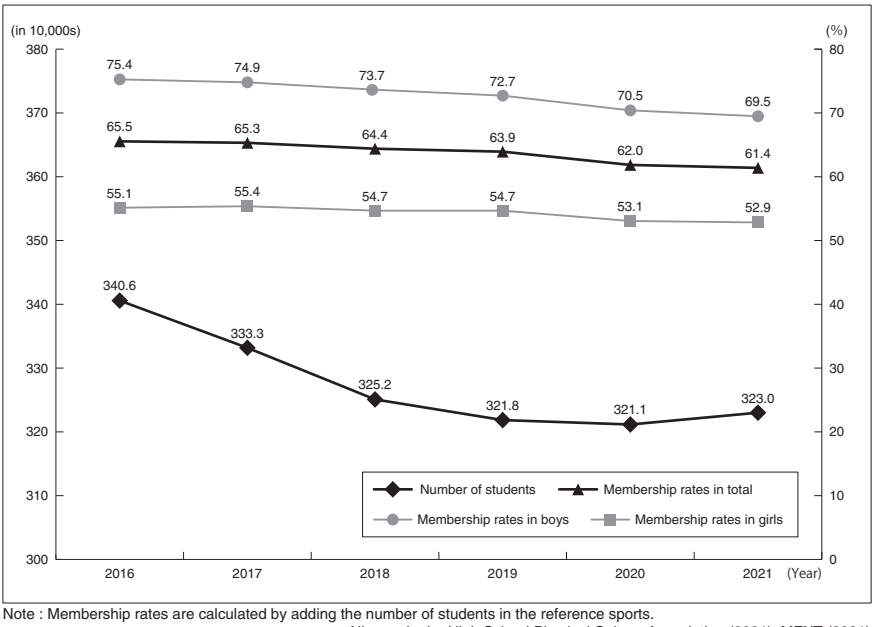
SSF National Sports-Life Survey of Children and Young People (2021)

Figure 5-6 Types of Sport Clubs for Young People Aged 12-21 years (Multiple Answers)

3. School Sport 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 sport clubs, the total number of students has decreased in the past five years, with the declining birthrate (Figure 5-7). The membership rate in school sport clubs also shows a gradual downward trend from 65.5% in 2016 to 61.4% in 2021. By gender, the membership rates of boys and girls both have dropped from 75.4% in 2016 to 69.5% in 2021 for boys, from 55.1% in 2016 to 52.9% in 2021 for girls.

Regarding the number of students registered by types of sport in 2021, "Football" had the largest number with 167,256 students (a registration rate of 14.6%) for boys, followed by "Basketball" with 164,005 students (14.3%), "Rubber baseball" with 149,485 students (13.0%), "Table Tennis" with 146,937 students (12.8%), "Soft Tennis" with 138,335 students (12.1%) and "Track and Field" with 123,916 students (10.8%) (Table 5-1). In terms of trends over the past five years, the registration rate for "Football" was 17.3% in 2016, but decreased by 2.7 percentage points to 14.6% in 2021. On the other hand, the registration rate for "Table Tennis", "Badminton" and "Track and Field" increased by 1.5 percentage points, 1.3 percentage points and 1.2 percentage points,



Note : Membership rates are calculated by adding the number of students in the reference sports.
Nippon Junior High School Physical Culture Association (2021), MEXT (2021)

Figure 5-7 Number of Junior High School Students and Membership Rates in School Sport Clubs

Table 5-1 Number of Students Registered in Junior High School Sport Clubs (Top 10)

【Boys】

Rank	Sport	2016		2021	
		Number of students	(%)	Number of students	(%)
1	Football	227,735	17.3	167,256	14.6
2	Basketball	175,987	13.4	164,005	14.3
3	Rubber Baseball	185,314	14.1	149,485	13.0
4	Table Tennis	148,160	11.3	146,937	12.8
5	Soft Tennis	171,397	13.0	138,335	12.1
6	Track and Field	126,111	9.6	123,916	10.8
7	Volleyball	56,782	4.3	56,889	5.0
8	Badminton	46,671	3.6	55,827	4.9
9	Kendo	54,177	4.1	42,307	3.7
10	Swimming	31,923	2.4	27,001	2.4

【Girls】

Rank	Sport	2016		2021	
		Number of students	(%)	Number of students	(%)
1	Soft Tennis	186,931	20.4	160,644	19.2
2	Volleyball	158,073	17.2	151,277	18.1
3	Basketball	135,500	14.8	126,121	15.1
4	Table Tennis	95,219	10.4	88,720	10.6
5	Track and Field	95,062	10.4	88,563	10.6
6	Badminton	87,100	9.5	84,322	10.1
7	Softball	41,847	4.6	30,190	3.6
8	Kendo	34,692	3.8	29,782	3.6
9	Swimming	16,782	1.8	14,837	1.8
10	Handball	11,336	1.2	9,940	1.2

Note: The ranks are the results from 2021 survey.

Nippon Junior High School Physical Culture Association (2016, 2021)

respectively.

For girls, "Soft Tennis" had the largest number registered with 160,644 students (a registration rate of 19.2%), followed by "Volleyball" with 151,277 students (18.1%), "Basketball" with 126,121 students (15.1%), "Table Tennis" with 88,720 students (10.6%) and "Track and Field" with 88,563 students (10.6%). Compared to the registration rate in 2016, the above all sports showed a flat trend.

4. School Sport 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 sport clubs were analyzed. The results showed that the total number of students has decreased by about 10.2% in the last ten years. On the other hand, the enrollment rate in school sport clubs has increased by 1.6 percentage points, from 41.0% in 2011 to 42.6% in 2021.

Table 5-2 shows the number of students registered with JHAF in 2016 and 2021 by types of sport. In 2021, "Football" had the largest number with 149,637 registered students (a registration rate of 20.7%) for boys. This was followed by "Basketball" with 85,368 students (11.8%), "Badminton" with 68,681 students (9.5%), "Track and Field" with 62,804 students (8.7%) and "Table Tennis" with 50,266 students (7.0%). Regarding trends over the past five years, the registration rate for "Badminton" and "Volleyball" increased by 2.4 percentage points and 1.2 percentage points, respectively. For girls, "Volleyball" had the largest number with 57,264 registered students (13.8%), followed by "Badminton" with 56,759 students (13.6%), "Basketball" with 54,849 students (13.2%), "Kyudo (Japanese archery)" with 35,883 students (8.6%) and "Track and Field" with 35,470 students (8.5%). Compared to the registration rate in 2016, there was an increase of 1.4 percentage points in "Kyudo (Japanese archery)" and a decrease of 1.4 percentage points in "Tennis", but the overall trend remained flat.

Table 5-2 Number of Students Registered in High School Sport Clubs (Top 10)

【Boys】

Rank	Sport	2016		2021	
		Number of students	(%)	Number of students	(%)
1	Football	169,855	20.9	149,637	20.7
2	Basketball	95,681	11.8	85,368	11.8
3	Badminton	57,830	7.1	68,681	9.5
4	Track and Field	70,276	8.6	62,804	8.7
5	Table Tennis	50,147	6.2	50,266	7.0
6	Volleyball	45,211	5.6	49,462	6.8
7	Tennis	68,752	8.5	45,486	6.3
8	Soft Tennis	48,669	6.0	41,626	5.8
9	Kyudo (Japanese archery)	34,254	4.2	29,282	4.1
10	Handball	29,273	3.6	27,142	3.8

【Girls】

Rank	Sport	2016		2021	
		Number of students	(%)	Number of students	(%)
1	Volleyball	60,941	13.5	57,264	13.8
2	Badminton	56,369	12.5	56,759	13.6
3	Basketball	61,175	13.5	54,849	13.2
4	Kyudo (Japanese archery)	32,658	7.2	35,883	8.6
5	Track and Field	39,613	8.8	35,470	8.5
6	Soft Tennis	36,062	8.0	30,316	7.3
7	Tennis	38,588	8.5	29,688	7.1
8	Table Tennis	20,872	4.6	22,046	5.3
9	Softball	22,047	4.9	17,408	4.2
10	Handball	16,428	3.6	15,607	3.8

Note: The ranks are the results from 2021 survey.

All Japan High School Athletic Federation (2016, 2021)

III. Private Fitness Clubs

1. Trends in Private Fitness Clubs

Market Size

The market size of private fitness clubs in Japan has been growing continuously since 2012, reaching an all-time industry high in 2019 with a market size (sales) of 493.9 billion yen, close to 500 billion yen (Table 5-3). However, under the COVID-19 pandemic in 2020, then Prime Minister's request to avoid the risk of infection in enclosed spaces and his identification of fitness clubs as high-risk locations for infection forced the fitness industry to close many clubs or shorten their hours of operation due to a half-imposed request for voluntary restraint. As a result, the market size in 2020 declined significantly to 319.6 billion yen, down approximately 35% from the previous year, making business conditions extremely difficult for fitness operators. Eleven of the top 15 fitness industry companies in the financial results for the fiscal year ending March 2021 were in the red, with a total deficit of 60 billion yen. This is actually equivalent to 23% of the total sales of the same 11 companies in the previous year. These operating companies were able to continue their business with financial support from their parent companies and capital alliance partners, but would have gone bankrupt without such support. In fact, others that did not receive support went bankrupt or closed, leading the highest number of fitness business bankruptcies in 2020 in the past ten years.

Although the market size in 2021 was affected somewhat by the Omicron variant (a mutant strain of the COVID-19), it recovered with the convergence and reached 411.3 billion yen, but not as large as the size in 2019. Of note is the change in the composition ratio of the market size. While all fitness club memberships declined significantly in the general

Table 5-3 Market Trend of Private Fitness Club Industry

	2017	2018	2019	2020	2021
Sales (in billions of yen)	460.2	478.6	493.9	319.6	411.3
Growth rate* (%)	2.9	4.0	3.2	-35.3	29.0

*Changes in sales compared to the previous year. The growth rate in 2017 is based on the sales reached in 2016 (447.3 billion yen).

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

Note 2: The above sales do not include facilities with only swimming pools (about 60 billion yen) but do include sales from swimming lessons (for adults and children) offered within sport 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.

Note 4: Small-scale businesses such as "Curves"are included.

Fitness Business (2021)

business category, which used to account for the majority of sales, the sales composition of 24-hour self-service gyms, personal gyms, swimming schools and online and merchandise sales, which have been increasingly opened in recent years, increased significantly.

Number of Fitness Clubs

Changes in the number of private fitness club facilities and the number of new private fitness club facilities opened in the last five years are shown in Table 5-4. As of the end of December 2021, the total number of private fitness clubs was 6,757. Before the COVID-19 pandemic, there were 400 to 500 new store openings per year, but in 2021, it dropped to 258. The breakdown by business type showed a large number of gym-type facilities: 2 small circuit-type facilities, 232 gym-type facilities, 8 studio-type facilities, 11 gym/studio-type facilities and 5 general-type facilities. Many of the gym-type facilities are 24-hour self-service gyms and personal training gyms that have been opening in recent years. There was a trend among members in their 20s and 30s who had joined the general business type, to shift to the gym type. Adult-oriented general business types, women-only facilities and boutique-type studios in urban areas were among the business types that had been most affected by the COVID-19 pandemic, and some of these facilities had quickly withdrawn.

Membership

The total number of private fitness club members increased 1.7% from approximately 4.25 million in 2020 to 4.33 million in 2021, but has not recovered, down 22% from the peak year of 2019 (Table 5-5). Although some private fitness clubs were treated as temporarily free and suspended, the progressive withdrawal of members due to a return to

Table 5-4 Number of Private Fitness Club Facilities

	2017	2018	2019	2020	2021
Number of facilities	5,299	5,821	6,188	6,564	6,757
Growth rate* (%)	6.9	9.9	6.3	6.1	2.9
Number of new facilities opened	378	536	379	406	258

*Changes in facilities compared to the previous year. The growth rate in 2017 is based on the number of facilities in 2016.

Note 1: The above numbers excluded business conversions, inherited facilities and relocated and newly established facilities.

Note 2: The number of new facilities opened in 2021 consists of 2 small-scale track types, 232 gym types, 8 studio types, 11 gym/studio hybrid types and 5 general facility types.

Fitness Business (2021)

Table 5-5 Membership and Number of Users in Private Fitness Clubs

	2017	2018	2019	2020	2021
Membership	4,627,730	5,136,780	5,552,860	4,253,491	4,325,678
Membership penetration rate (%)	3.65	4.07	4.40	3.38	3.45
Total number of users (in ten thousand)	34,939	39,091	42,368	27,137	33,264
Number of users per facilities	65,936	67,190	68,469	41,343	49,230
Frequency of use per year	76.5	76.1	76.3	63.8	76.9

Fitness Business (2021)

fee-based membership is thought to be one of the reasons why the number of the members did not increase significantly. The number of new private fitness club members per month in 2020 and 2021, which was still under the COVID-19 pandemic situation, also remained low and was characterized by no months in which new memberships increased.

The membership penetration rate reached 4.07% in 2018 and 4.4% in 2019, and was expected to grow thereafter, but dropped significantly to 3.38% in 2020. In 2021, it increased slightly, but only to 3.45%. It is assumed that the large increase in the frequency of use per year from 63.8 times in 2020 to 76.9 times in 2021 is affected by these heavy users remaining in the club.

Profitability

Regarding changes in the revenue of major private fitness clubs, the number of school members has been recovering steadily, but the return of private fitness club members has been slower than expected, and as of December 2022, it remains 20-30% below the peak period in 2019. To compensate for the reduced revenue, each company has been working to reduce costs, raise membership fees, strengthen sales of ancillary services, introduce swimming schools and utilize the designated manager system.

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 sport 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 sport 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 and the Japan Sports Agency (JSA) has succeeded the measure.

According to the JSA's "Survey on the Development of Comprehensive Community Sports Clubs" (2022), the number of comprehensive clubs had increased by six times over the 10 years since the beginning of the survey in 2002 (Figure 5-8). The increase observed in 2005 was particularly significant, when the number of clubs almost doubled from 1,117 clubs in 2004, to 2,155 clubs in 2005. After 2006, the increase rate remained at around 3-8% when compared to the previous year. However, in 2013, the increase rate was even lower, growing by only 1% from the previous year. After 2013, the total number of comprehensive clubs remained flat and was 3,584, of which 3,450 clubs were operational and 133 clubs were in the process of establishment in 2022.

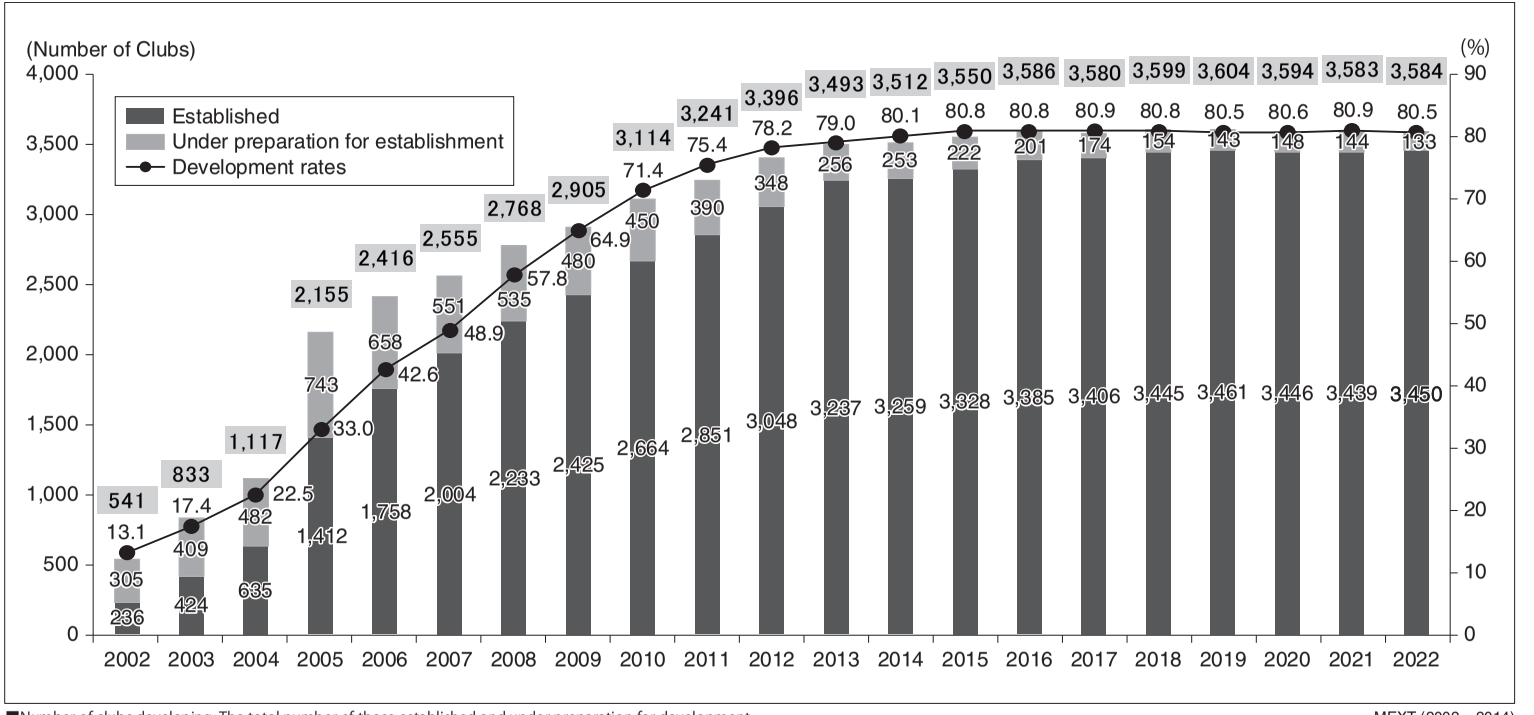
The Sport Basic Plan sets out policy goal that aims to continuously develop at least one comprehensive club in each municipality. Excluding the local communities with depopulation, 80% of the municipalities across the country now has established comprehensive clubs and it could be said that they were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

2. Management of Comprehensive Community Sports Clubs

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

Number of Members

Regarding the number of the comprehensive club members and the changes observed over the years, the most prevalent size for a



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

MEXT (2002 – 2014)
Japan Sports Agency (2015 – 2022)

Figure 5-8 Changes in the Number of Comprehensive Community Sports Clubs and the Development Rate

comprehensive club was 101 to 300 members, accounting for almost 40% of the total since 2005 (41.7% in 2022). Those with 300 or fewer members have shown a levelling off trend. Clubs with over 1,000 members accounted for less than 10% of the total (5.7% in 2022).

Budget Size and Internal Revenue Rate

In terms of 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 2022, and clubs with a budget of 10 million or more increased instead. The survey in 2022 showed that the clubs with a budget of 1.01 million to 4 million yen consisted of 28.7 %.

Furthermore, regarding the internal revenue rate (based on the ratio of membership fees, operating costs and consignment costs compared to revenue), less than half of the comprehensive clubs (33.4%) had a 50% or lower internal revenue rate in 2022, and in fact this trend has improved since 2013 (53.6%). In most cases, other income came from government subsidies or grants. To ensure their sustainable operation, it is necessary that comprehensive clubs become more independent in their club management without the government subsidies or grants.

Figures

Tables

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