

Report on the Tennis Environment in Japan

March 2013

Japan Tennis Association

This is an abridged translation into English of the Japanese language report entitled “*tenisu jinkoutou kankyou jittai chousa houkokusho*” (テニス人口等環境実態調査報告書), which was published by the Japan Tennis Association in March 2013 as its special project for fiscal year 2012.

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1. Introductory Remarks

The Japan Tennis Association published a 102-page report on the tennis environment in Japan in March of this year as a special project of 2012, which marked its 90th anniversary. It is my great pleasure at this point in time to present the English version, albeit abridged, of this report.

The objective of this report, which has turned out to be the first of its kind in the field of tennis in Japan, was to compile basic quantitative data on the current state of tennis playing and tennis-related business, profit-making or non-profitmaking alike, in Japan. The quantitative data compiled in the report pertains to the tennis population, tennis courts, tennis instructors, court officials, the current state of tennis-related associations and business undertakings, and the like. The ultimate objective of this compilation of basic tennis data, however, lies in the expansion of the base of the tennis population, which is being adversely affected by the declining birthrate and ageing of the population.

We believe that the successive compilation of such basic data should enable us to assess what we have done for the promotion of tennis in Japan as the national sporting association governing tennis. It should also help our colleagues in regional and prefectural tennis associations to work more effectively to popularize this life-long sport, develop junior tennis players, and organize tournaments in their own jurisdictions. I would like to add with gratitude that this research project, which was conducted by a 10-person project team created in January last year within the Japan Tennis Association, received professional support from the Sasakawa Sports Foundation, which is known for its biannual SSF Sports-Life Survey. The project was subsidized by the Sports Promotion Lottery of the Japan Sport Council. These bodies enabled us to carry out surveys on 9 regional tennis associations, 47 prefectural tennis associations and tennis business operators nationwide, while allowing us to make the maximum use of available tennis-related statistics and research compiled by the government and private institutes.

As shown in the report, Japanese tennis is faced with the double problem of a declining tennis population and a reduction in the number of tennis courts. By sharing the findings of this report with as many colleagues as possible, the Japan Tennis Association, as a public-interest incorporated foundation charged with the promotion of tennis as a life-long, competitive, and spectator sport in Japan, is now committed to improving the tennis environment in Japan and expanding the base of the tennis population through the nation-wide promotion of PLAY+STAY.

I would like to conclude my remarks by saying that through the publication of this English version I am pleased to share with our colleagues in other countries over our findings in the report and inform them about some of our experiences in promoting tennis as well as the challenges facing the Japan Tennis Association. As the Japan Tennis Association is a member of the International Tennis Federation and the Asian Tennis Federation, I will be more than happy if this report serves as a stepping stone for us to work together so that the status of tennis in the world of sports will be raised, thereby contributing more to the sporting life of world citizens.

March 2013

Nobuo Kuroyanagi

President
Japan Tennis Association

2. Findings

(1) The Tennis Population of 3.73 Million in Japan Is Shrinking Over the Long Term

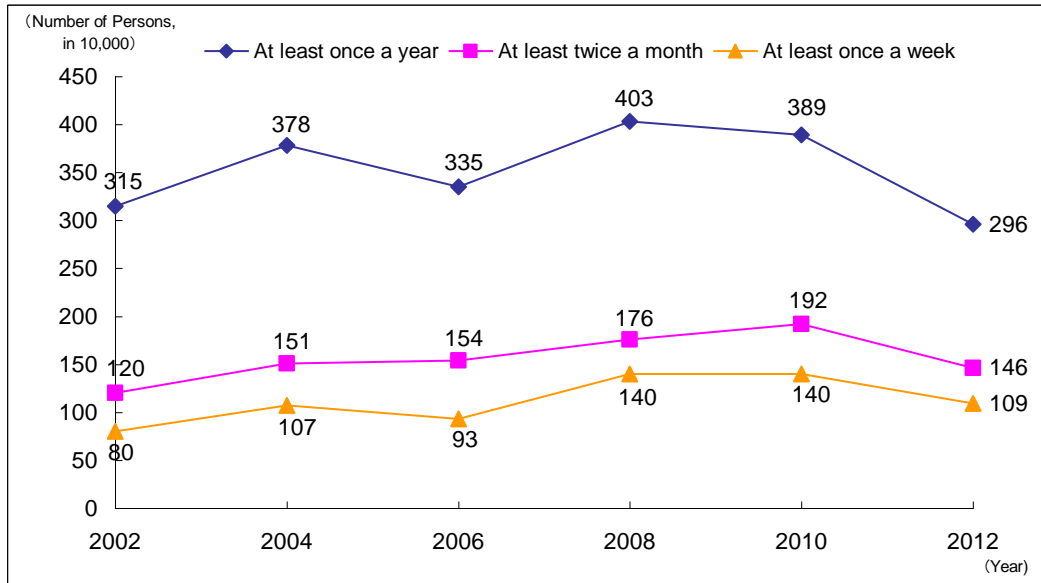
The tennis population in Japan, defined as the number of people aged 10 or older who played tennis (excluding soft tennis) at least once in the past one year, was 3.73 million and is shrinking over the long term, according to the Sasakawa Sports Foundation's (SSF) "National Sports-Life Survey" among adults and young people (2001-2012, thereafter SSF Survey). The tennis population has decreased from 4.23 million a decade ago to 3.73 million (Chart 1, 2). However, tennis is not the only competitive sport that is experiencing a declining trend. Almost all competitive sports populations, excluding that of soccer, have remained static or are in decline. Meanwhile, the soft tennis population in 2012 stood at 1.97 million.

(2) There Is a Potential Recreational Tennis Player Segment, While the Committed Players Remain Strong

Among adults (20 years old and above), the number of those who would like to start or continue playing tennis in the future was about twice more than the current tennis population, according to the SSF Survey in 2012. This indicates the presence of a potential recreational segment of tennis players.

Comparing the 2002 and 2012 SSF Surveys, the adult tennis population (those who played tennis at least once a year) itself was gradually declining, although "regular" tennis players, such as those who played at least twice a month or once a week, remained static (Chart 1). The number of players who played tennis at least once a year was smaller than the corresponding figures for badminton or table tennis players, but "regular" players (at least once a week) of tennis surpassed these two sports. It can be said that committed tennis players remain strongly attached to the sport.

Chart 1: Changes in Adult Tennis Population



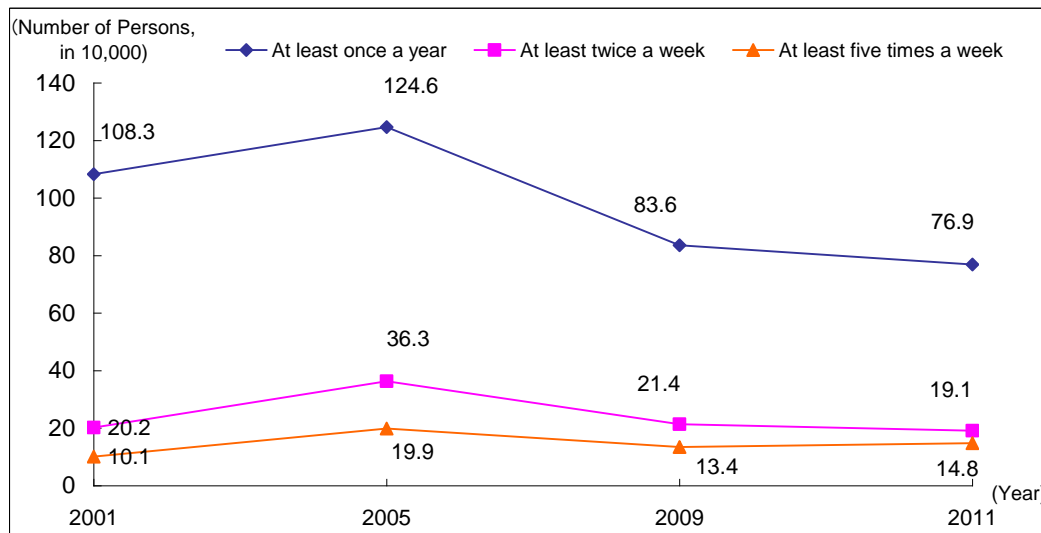
	2002	2004	2006	2008	2010	2012
At least once a year (%)	3.1	3.7	3.3	3.9	3.8	2.9
At least twice a month (%)	1.2	1.5	1.5	1.7	1.9	1.4
At least once a week (%)	0.8	1.0	0.9	1.4	1.4	1.1
Adult population, Basic resident register (Number of Persons)	100,649,429	101,730,947	102,636,961	103,387,474	103,824,522	103,973,831

Note 1) Tennis population in the chart was estimated by multiplying the adult population of the basic resident register and the player ratio (%)

Note 2) "At least once a year" includes "At least twice a month" and "At least once a week." "At least twice a month" includes "At least once a week"

From "SSF National Sports-Life Survey," Sasakawa Sports Foundation (2002-2012)

Chart 2: Changes in Young (10-19 years old) Tennis Population



	2001	2005	2009	2011
At least once a year (%)	7.9	9.7	6.9	6.4
At least twice a week (%)	1.5	2.8	1.8	1.6
At least five times a week (%)	0.7	1.6	1.1	1.2
Population age 10-19, Basic resident register (Number of Persons)	13,741,741	12,856,314	12,143,089	12,004,534

Note 1) Tennis population in the chart was estimated by multiplying the population of age 10-19 from the basic resident register and the player ratio (%)

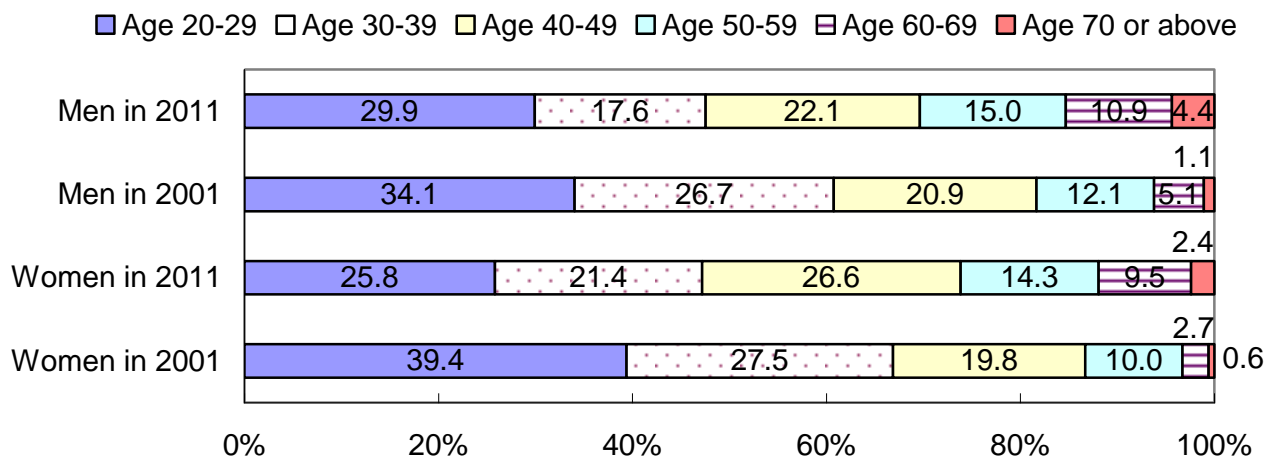
Note 2) "At least once a year" includes "At least twice a week" and "At least five times a week." "At least twice a week" includes "At least five times a week"

From "SSF National Sports-Life Survey of Young People," Sasakawa Sports Foundation (2001-2011)

(3) An Ageing Adult Tennis Population

Looking at the age composition of the adult tennis population, the largest age group among men was 20-29 years old (29.9%), and among women 40-49 years old (26.6%), according to the “Survey on Time Use and Leisure Activities” (2011) by the Ministry of Internal Affairs and Communications. Compared to a decade ago in 2001, among both men and women the proportions of the 20-29 year old and 30-39 year old segments became smaller, while all the age groups over 40 years old were larger in 2011. In particular, those 60-69 years old among both men and women have significantly increased, and the tennis population is indeed ageing (Chart 3).

Chart 3: Gender and Age Group Composition of Adult Tennis Players



Note: May include soft tennis players

From “Survey on Time Use and Leisure Activities,”
Ministry of Internal Affairs and Communications (2011)

(4) Prefectures with the Top Tennis Player Ratios: Tokyo, Kanagawa, Hyogo, Chiba, Aichi, Kyoto

The top five prefectures in terms of tennis population (number of persons) were Tokyo, Kanagawa, Aichi, Osaka, and Saitama, according to the “Survey on Time Use and Leisure Activities” (2011) by the Ministry of Internal Affairs and Communications (Table 1). On the other hand, the top five prefectures in terms of tennis player ratio (proportion of tennis players in the general population) were Tokyo, Kanagawa, Hyogo, Chiba, Aichi, and Kyoto (including two prefectures with the same ratio) (Table 2).

Table 1: Tennis Population by Prefecture (10 years and older: Top 10)

Rank	Prefecture	Tennis Population (in 1,000)	Population of Age 10 or above in each Prefecture (in 1,000)
1	Tokyo	732	11,998
2	Kanagawa	474	8,127
3	Aichi	321	6,596
4	Osaka	306	7,936
5	Saitama	297	6,477
6	Chiba	279	5,584
7	Hyogo	254	4,979
8	Shizuoka	142	3,343
	Hokkaido	142	4,883
10	Fukuoka	117	4,478

Note: May include soft tennis players

From “Survey on Time Use and Leisure Activities,”
Ministry of Internal Affairs and Communications (2011)

Table 2: Tennis Player Ratio by Prefecture (10 years and older: Top 10)

Rank	Prefecture	Tennis Player Ratio (%)	Tennis Population (in 1,000)
1	Tokyo	6.1	732
2	Kanagawa	5.8	474
3	Hyogo	5.1	254
4	Chiba	5.0	279
5	Aichi	4.9	321
	Kyoto	4.9	115
7	Saitama	4.6	297
8	Gifu	4.4	81
9	Shizuoka	4.3	142
	Ibaraki	4.3	115

Note: May include soft tennis players

From “Survey on Time Use and Leisure Activities,”
Ministry of Internal Affairs and Communications (2011)

(5) Tennis Court Facilities Decreased by One-Third During the 13 Years from 1996 to 2008

In 2008, there were 8,702 facilities with tennis courts nationwide, a decrease by one-third from 13,229 in 1996, according to the “Survey on Facilities for Physical Education and Sports” by the Ministry of Education, Culture, Sports, Science and Technology. By facility type, all three – public, commercial, and company owned – have decreased. In particular, the company owned tennis court facilities (i.e., welfare facilities of companies) have decreased by half during a 13-year period, from 3,527 facilities in 1996 to 1,608 in 2008 (Table 3).

The number of tennis courts of public and commercial facilities (excluding company owned) was 28,398 in 2008, a decrease by one-fourth from 38,423 in 1996. Comparing indoor versus outdoor, the number of indoor courts increased. By facility type, the decrease in courts of commercial facilities was larger than that of public ones (Table 4). It is safe to assume that the commercial tennis industry has been exposed to a difficult business environment.

Table 3: Changes in Number of Facilities with Tennis Courts by Facility Type

Facility Type		Year 1996	Year 2002	Year 2008
Public	Outdoor	7,381	6,140	5,530
	Indoor	127	158	215
	Total	7,508	6,298	5,745
Commercial	Outdoor	1,859	1,385	1,026
	Indoor	335	304	323
	Total	2,194	1,689	1,349
Company owned (Welfare facilities of company)	Outdoor	3,457	2,239	1,565
	Indoor	70	29	43
	Total	3,527	2,268	1,608
Total	Outdoor	12,697	9,764	8,121
	Indoor	532	491	581
	Total	13,229	10,255	8,702

From “Survey on Facilities for Physical Education and Sports,”
Ministry of Education, Culture, Sports, Science and Technology (1996, 2002, 2008)

Table 4 : Changes in Number of Tennis Courts by Facility Type

Facility Type		Year 1996	Year 2002	Year 2008
Public	Outdoor	27,509	23,610	21,910
	Indoor	386	472	580
	Total	27,895	24,082	22,490
Commercial	Outdoor	9,582	6,919	4,981
	Indoor	946	866	927
	Total	10,528	7,785	5,908
Total	Outdoor	37,091	30,529	26,891
	Indoor	1,332	1,338	1,507
	Total	38,423	31,867	28,398

From “Survey on Facilities for Physical Education and Sports,”
Ministry of Education, Culture, Sports, Science and Technology (1996, 2002, 2008)

(6) Tennis Equipment Market Size: 54.6 Billion Yen, 8th in the Sports Equipment Market

The market size of tennis equipment was estimated at some 54.6 billion Japanese yen in 2012, and was 4.3% of the total sports equipment market, according to the Yano Research Institute's study "Sporting Goods Industry 2012." The market sizes by sport equipment types showed that golf had the largest share at 19.3%, followed by sport shoes, outdoor, athletic wear, fishing, baseball/softball, and soccer/futsal. Tennis (including soft tennis) placed eighth (Table 5).

The composition of the shipment amount by tennis equipment type showed that tennis apparel was 42.8% of the total, followed by tennis shoes at 14.9%, according to the 2012 estimates (Chart 4). Looking at the changes in domestic shipment, it was some 85 billion yen in 1986, when the statistics were first taken. In 1991, when the Bubble Economy was in its final stage in Japan, the domestic shipping amount was a record-high 105.2 billion. Afterwards, it went into a downward trend for all years except 2003 and 2004 (Chart 5).

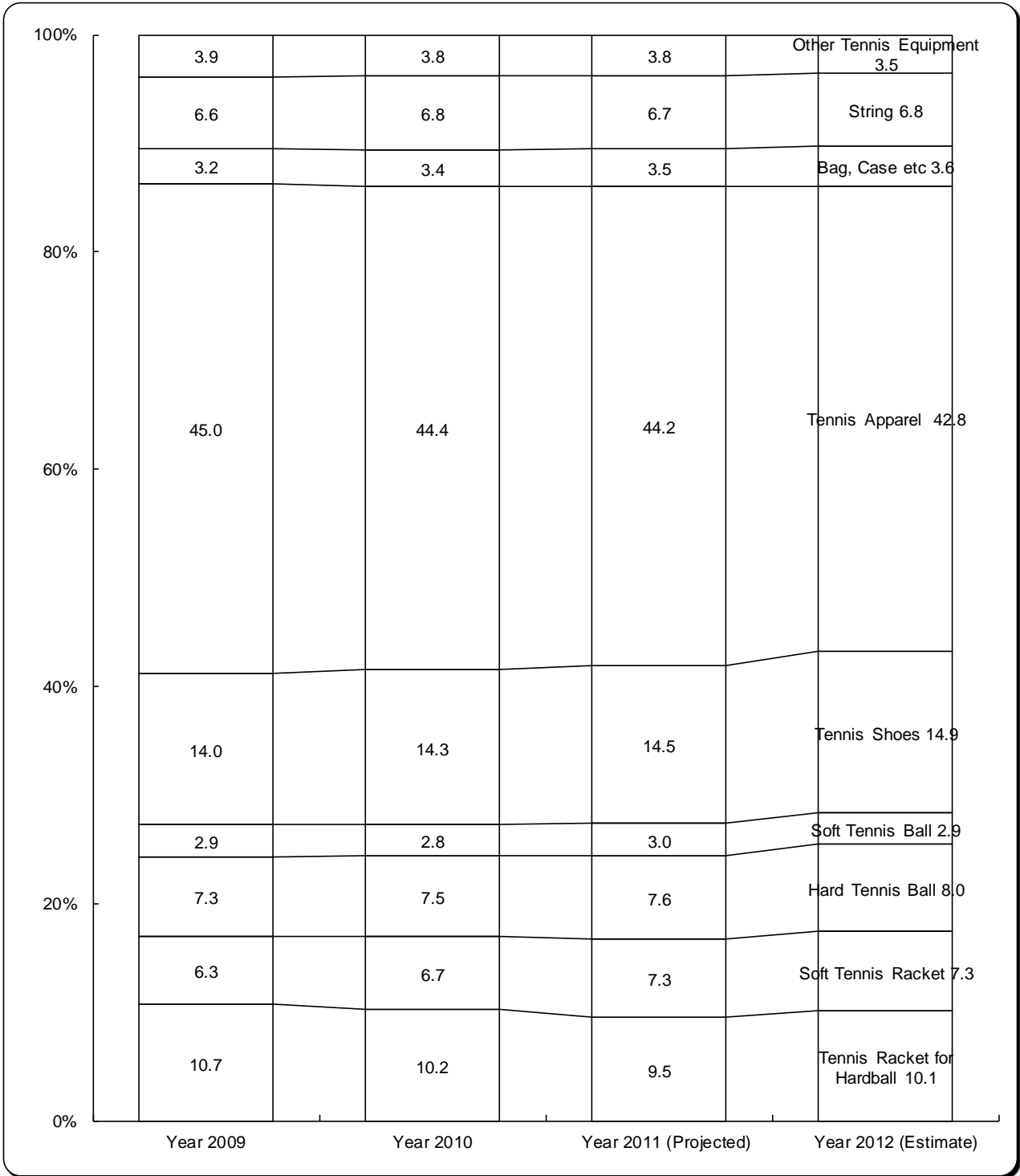
Table 5: Changes in Sport Equipment Domestic Market Size (By Equipment Types)

Unit: Million Yen, % Upper: Composition Lower: Comparison from Previous Year

	Year 2007		Year 2008		Year 2009		Year 2010		Year 2011		Year 2012	
		%		%		%		%	(Projected)	%	(Estimate)	%
Golf	294,030	22.9	292,960	22.5	268,050	21.2	258,930	20.7	242,280	19.6	243,800	19.3
		-		99.6		91.5		96.6		93.6		100.6
Ski/Snowboard	60,570	4.7	58,670	4.5	54,770	4.3	52,650	4.2	52,050	4.2	51,470	4.1
		-		96.9		93.4		96.1		98.9		98.9
Fishing	126,770	9.9	125,110	9.6	124,980	9.9	119,870	9.6	110,520	8.9	117,240	9.3
		-		98.7		99.9		95.9		92.2		106.1
Athletic Wear	169,160	13.2	176,840	13.6	166,980	13.2	165,240	13.2	158,610	12.8	159,290	12.6
		-		104.5		94.4		99.0		96.0		100.4
Outdoor	125,610	9.8	131,510	10.1	136,000	10.7	142,490	11.4	155,160	12.6	162,240	12.9
		-		104.7		103.4		104.8		108.9		104.6
Sports Shoes	167,460	13.0	177,770	13.6	178,510	14.1	180,310	14.4	184,640	14.9	187,840	14.9
		-		106.2		100.4		101.0		102.4		101.7
Tennis	61,150	4.8	60,620	4.7	58,270	4.6	55,900	4.5	54,120	4.4	54,610	4.3
		-		99.1		96.1		95.9		96.8		100.9
Swim	26,370	2.1	27,590	2.1	25,140	2.0	24,260	1.9	23,330	1.9	23,870	1.9
		-		104.6		91.1		96.5		96.2		102.3
Baseball/Softball	74,100	5.8	74,350	5.7	74,800	5.9	73,190	5.8	72,730	5.9	72,790	5.8
		-		100.3		100.6		97.8		99.4		100.1
Cycle Sports	22,600	1.8	28,100	2.2	30,300	2.4	31,600	2.5	34,350	2.8	37,000	2.9
		-		124.3		107.8		104.3		108.7		107.7
Badminton	13,195	1.0	13,595	1.0	13,340	1.1	13,810	1.1	13,470	1.1	14,010	1.1
		-		103.0		98.1		103.5		97.5		104.0
Budo	13,600	1.1	13,360	1.0	12,610	1.0	12,980	1.0	12,780	1.0	12,700	1.0
		-		98.2		94.4		102.9		98.5		99.4
Table Tennis	9,650	0.8	9,650	0.7	9,685	0.8	9,685	0.8	9,520	0.8	9,720	0.8
		-		100.0		100.4		100.0		98.3		102.1
Fitness	18,390	1.4	18,480	1.4	18,820	1.5	20,240	1.6	20,640	1.7	20,440	1.6
		-		100.5		101.8		107.5		102.0		99.0
Soccer/Futsal	67,380	5.2	61,970	4.8	61,940	4.9	60,390	4.8	61,050	4.9	62,330	4.9
		-		92.0		100.0		97.5		101.1		102.1
Basketball	21,000	1.6	20,460	1.6	19,770	1.6	19,540	1.6	19,670	1.6	19,680	1.6
		-		97.4		96.6		98.8		100.7		100.1
Volleyball	11,090	0.9	10,370	0.8	10,090	0.8	9,760	0.8	9,630	0.8	9,650	0.8
		-		93.5		97.3		96.7		98.7		100.2
Rugby	1,790	0.1	1,770	0.1	1,660	0.1	1,510	0.1	1,600	0.1	1,620	0.1
		-		98.9		93.8		91.0		106.0		101.3
Total	1,283,915	100.0	1,303,175	100.0	1,265,715	100.0	1,252,355	100.0	1,236,150	100.0	1,260,300	100.0
		-		101.5		97.1		98.9		98.7		102.0

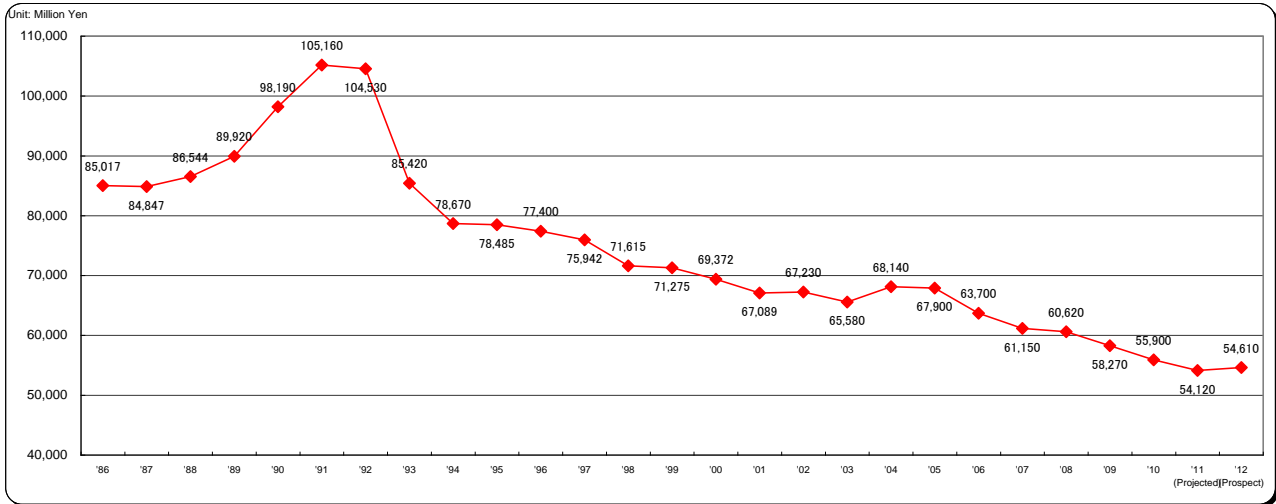
Note) Market sizes for all sport categories have been re-investigated and re-calculated from the year 2007

Chart 4: Changes in Shipping Amount by Tennis Equipment Types



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Chart 5: Changes in Tennis Equipment Domestic Shipment



Note) Market sizes have been re-calculated from the year 2008 or earlier; thus there could be some differences from the market sizes that were released in the past from year to year

Year 1986		Year 1987		Year 1988		Year 1989		Year 1990		Year 1991		Year 1992		Year 1993		Year 1994	
Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year
85,017	—	84,847	99.8	86,544	102.0	89,920	103.9	98,190	109.2	105,160	107.1	104,530	99.4	85,420	81.7	78,670	92.1
Year 1995		Year 1996		Year 1997		Year 1998		Year 1999		Year 2000		Year 2001		Year 2002		Year 2003	
Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year
78,485	99.8	77,400	98.6	75,942	98.1	71,615	94.3	71,275	99.5	69,372	97.3	67,089	96.7	67,230	100.2	65,580	97.5
Year 2004		Year 2005		Year 2006		Year 2007		Year 2008		Year 2009		Year 2010		Year 2011		Year 2012	
Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	Year	Year-on-Year	(Projected)	(Estimate)	Year	Year-on-Year
68,140	103.9	67,900	99.6	63,700	93.8	61,150	96.0	60,620	99.1	58,270	96.1	55,900	95.9	54,120	96.8	54,610	100.9

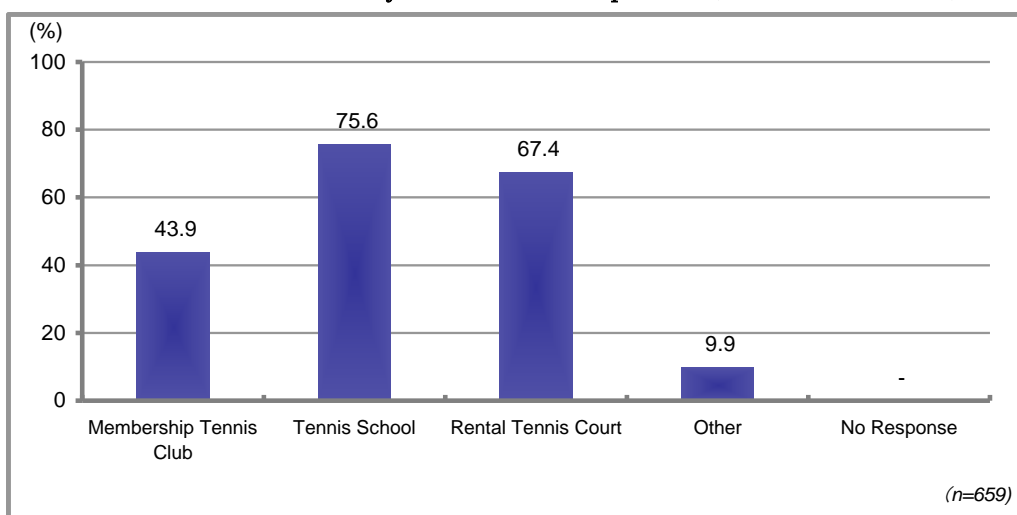
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(7) Tennis Business Operators Focusing on Tennis School Services

According to the “National Tennis Business Operators Survey” (2012, effective response rate 36.5%) by the Japan Tennis Association, among the 659 operators that responded to the survey, 43.9% offered membership tennis clubs, 75.6% offered tennis schools, and 67.4% offered rental tennis court services (multiple answers possible, Chart 6).

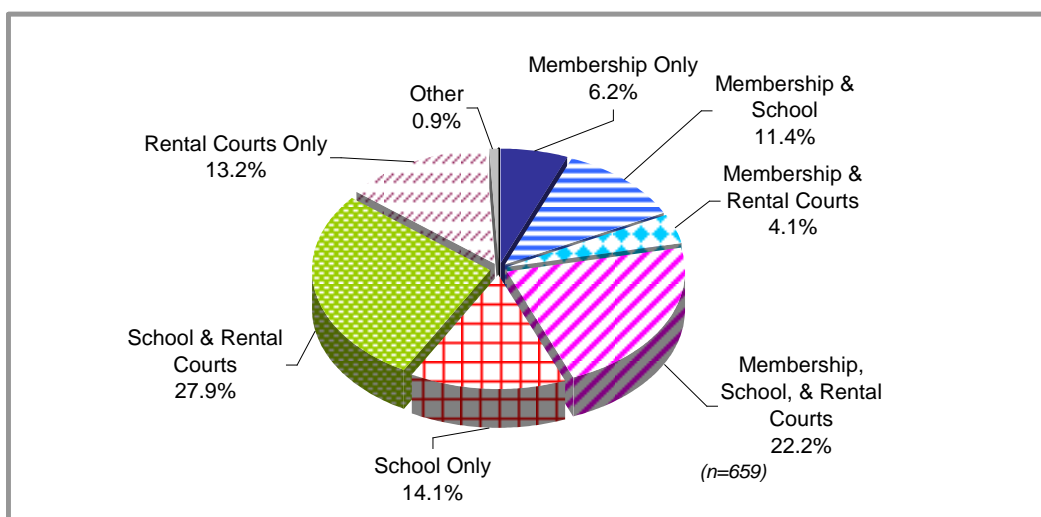
According to the “Survey of Selected Service Industries” (2004) by the Ministry of Economy, Trade and Industry, 60.8% of the operators offered tennis schools. However, the “National Tennis Business Operators Survey” (2012) by the Japan Tennis Association showed that as many as 75.6% operated tennis schools. It can be inferred that the tennis industry is focusing on schooling services.

Chart 6: Services Offered by Tennis Business Operators (Base: 659 businesses)



Looking at the combination of services the businesses responding to the “National Tennis Business Operators Survey” offered, 27.9% had “school and rental courts” and 22.2% had “membership, school, and rental courts,” each given by more than 20%. “School only,” “rental courts only,” and “membership and school” were all given by less than 20%, and “membership only” and “membership and rental courts” were both given by less than 10% (Chart 7).

Chart 7 : Combination of Services Offered by Tennis Business Operators (Base: 659 businesses)



(8) One in Ten Tennis School Students Are Children Under 10, and There Is Interest in PLAY + STAY

Among the 659 tennis businesses that responded to the “National Tennis Business Operators Survey” (2012) by the Japan Tennis Association, 289 businesses (43.9%) had membership tennis clubs, with 42,325 members in total (Chart 8). 45.3% of their members were 60 years old or above, thus indicating a graying membership (Chart 9).

On the other hand, 498 businesses (75.6%) had tennis schools as part of their services, with 216,503 students (Chart 10). 40-49 years old and 10-19 years old students were the largest age groups, each comprising slightly less than 20% of the total, revealing a stark difference from membership clubs (Chart 11).

In addition, 10.5% of tennis school students were younger than 10 years old. The Japan Tennis Association promotes for children under 10 years old the International Tennis Federation’s recommended PLAY+STAY program, as a means of expanding the tennis population. The PLAY+STAY program uses courts and three types of balls that fit children’s respective physical development stages. 62.4% of tennis businesses indicated interest in PLAY+STAY (Chart 12), with tennis school operators showing particularly strong interest.

Chart 8: Number of Tennis Club Members (By Gender) (Base: 281 businesses, No response: 8 businesses)

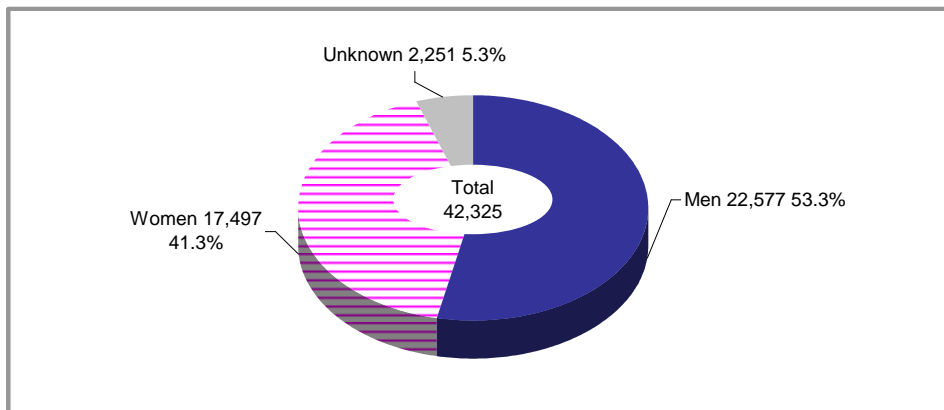


Chart 9: Number of Tennis Club Members (By Gender and Age) (Base: 281 businesses, No response: 8 businesses)

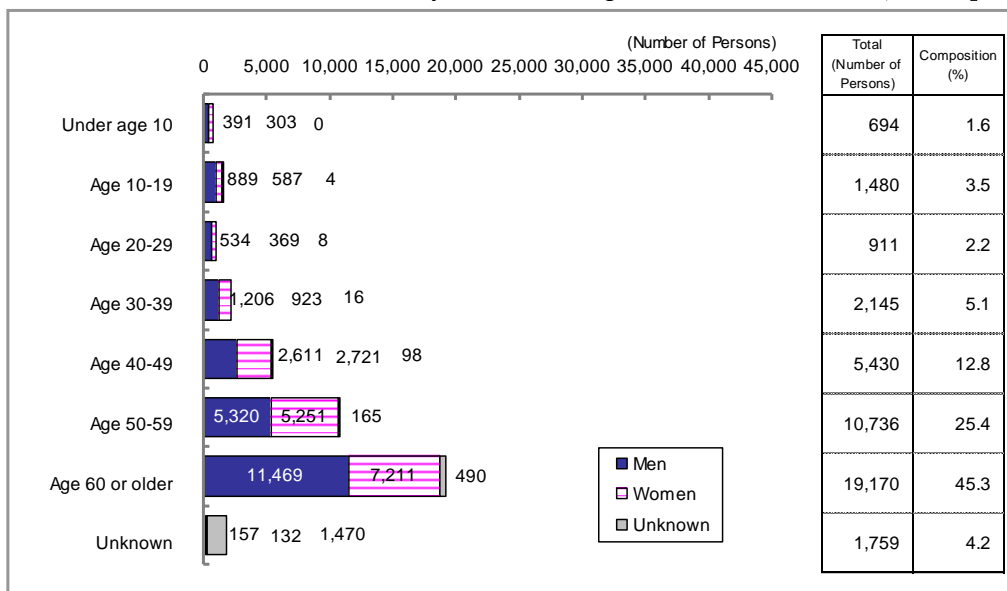


Chart 10: Number of Tennis School Students (By Gender) (Base: 481 businesses, No response: 17 businesses)

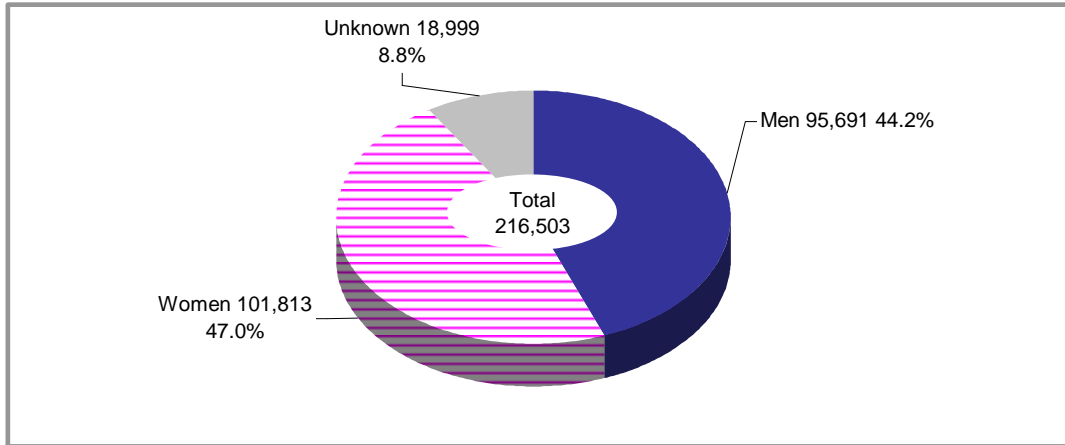


Chart 11: Number of Tennis School Students (By Gender and Age)

(Base: 481 businesses, No response: 17 businesses)

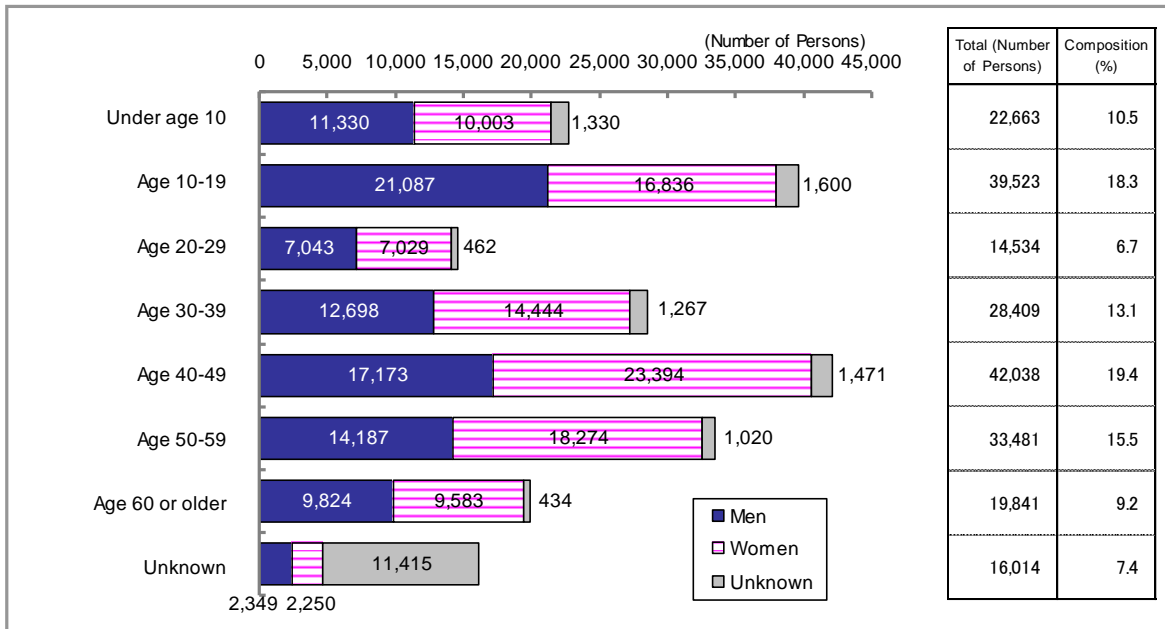
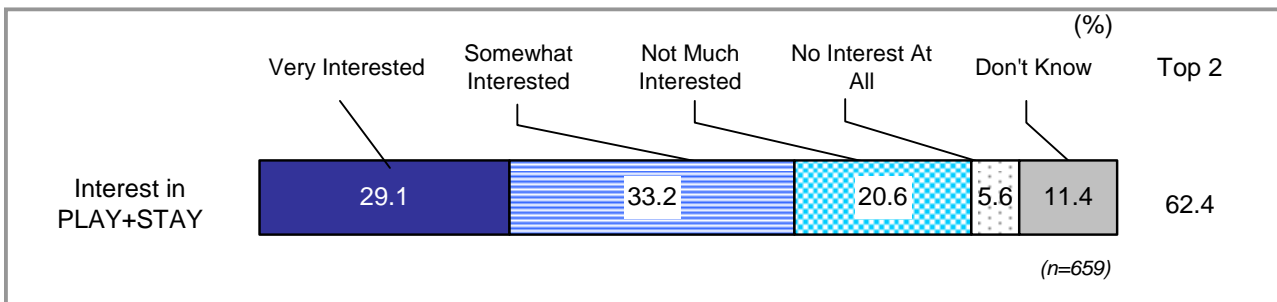


Chart 12: Interest in PLAY+STAY (Base: 659 businesses)



(9) Expectations Towards Media Strategies, Activities to Popularize, and School Tennis for Expanding the Tennis Population

When asked about what they wanted from the Japan Tennis Association, many tennis business operators gave responses such as “more media exposure for tennis,” “activities to popularize tennis,” and “activities to popularize tennis at school” in the “National Tennis Business Operators Survey” (2012) by the Japan Tennis Association (Table 6). In regard to activities to popularize tennis at school, some urged that tennis should be included as an official sport of the National Junior High School Physical Education Meet (by joining the Nippon Junior High School Physical Culture Association) in order to promote tennis as an extracurricular activity at junior high schools.

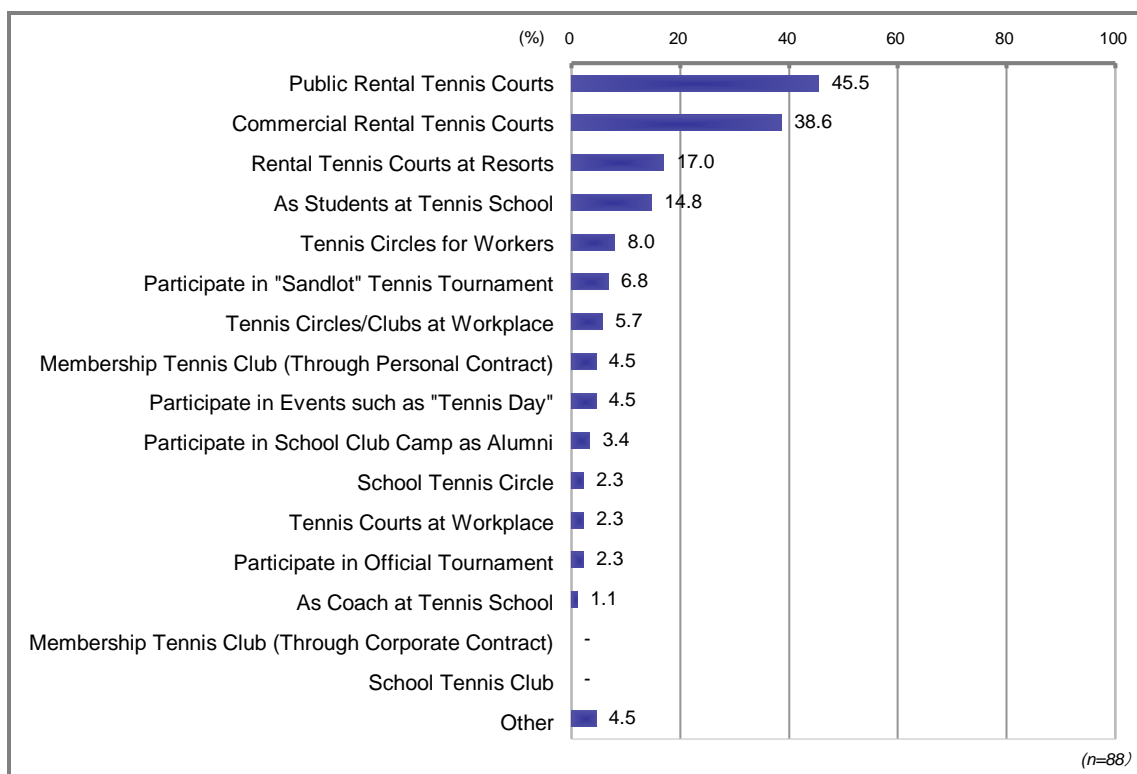
Table 6: Expectations and Requests for the Japan Tennis Association (Base: 659 businesses)

Opinions	Number of Mentions
More media exposure for tennis	53
Improve the environment for playing tennis, activities to popularize, increase the tennis population	29
Activities to popularize tennis at school (e.g. tennis clubs at junior high schools)	22
Development of top players (e.g. winning medals)	16
Tax incentives for tennis businesses	14
Hosting tournaments	14
Junior player development	13
Promote PLAY+STAY	12
Integrate and promote coordination among tennis-related organizations	10
Promote tennis as a life-long sport	9
Competition with public courts	8
Training and information sharing for coaches/instructors	8
Promote tennis as a spectator sport	5
Provide professional tennis players clinics	5
Address problems regarding unlicensed coaches/instructors	4
Tennis for children	4
Improve working conditions for coaches/instructors	3
Make JTA player registration and tournaments more open	3
Ageing of the tennis population	3
Provide data	3
Goods and prize money sponsorship for tournaments	2
Promotional activities for tennis beginners	2
Other	3

(10) People in Metro Tokyo Play Tennis at Rental Courts, with Friends/Acquaintances

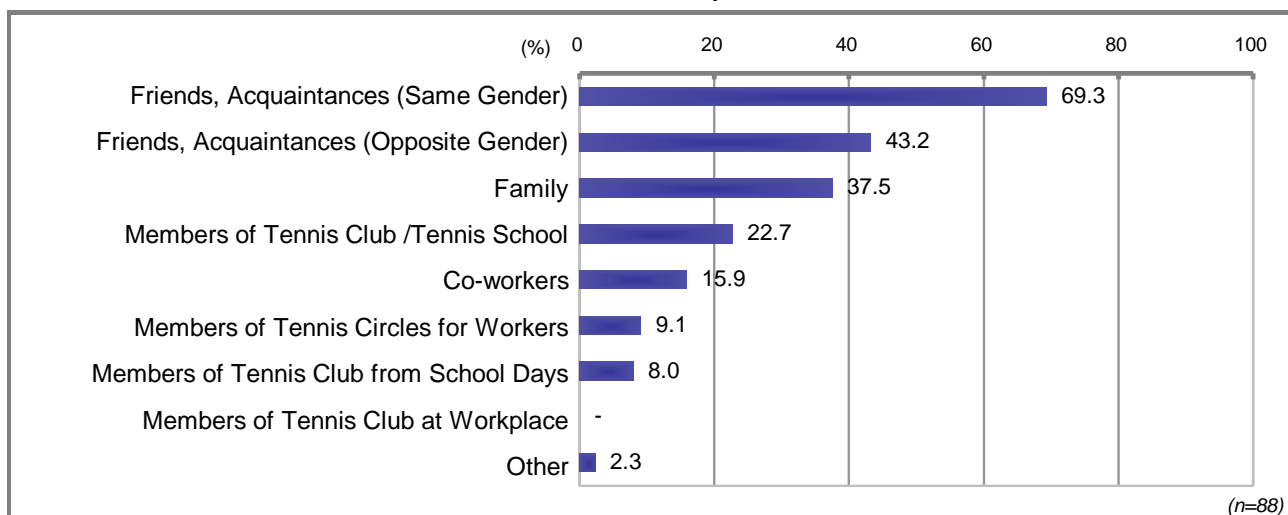
Among adult regular tennis players (20 years old or above) in the four prefectures (Tokyo, Kanagawa, Chiba, and Saitama) of Metro Tokyo, most play tennis at “public rental tennis courts” (45.5%), followed by those who play at “commercial rental tennis courts” (38.6%) (Chart 13, multiple answers possible), according to the “Tennis Come Back, Tennis Intender Survey” (2008) by the Committee of Activating Tennis. The survey also showed that many play tennis with “friends and acquaintances of the same gender” (69.3%) (Chart 14, multiple answers possible). The Committee of Activating Tennis was founded by the Japan Tennis Industry Association and nine manufactures of tennis equipment.

Chart 13: Where to Play Tennis



From "Tennis Come Back, Tennis Intender Survey"(2008), Committee of Activating Tennis/ Do Not Reproduce Without Permission

Chart 14: Whom to Play Tennis With



From "Tennis Come Back, Tennis Intender Survey"(2008), Committee of Activating Tennis/ Do Not Reproduce Without Permission

(11) 12,761 Registered Players with the Japan Tennis Association, Gradually Decreasing and Ageing

The Japan Tennis Association has a player registration system with the three categories of professional, general, and veteran. In 2012, there were 334 registered professional players in total. There were more male players than female, with men comprising 63.5% of the total (Chart 15).

The age groups of registered professional players ranged from teen to 60 years or older, but the 20-29 years old and 30-39 years old groups were the largest, with 102 players each. By gender and age groups, male players in their thirties were the largest group, with 72 players (Chart 16).

Chart 15: Japan Tennis Association Registered Professional Players (By Gender) in 2012

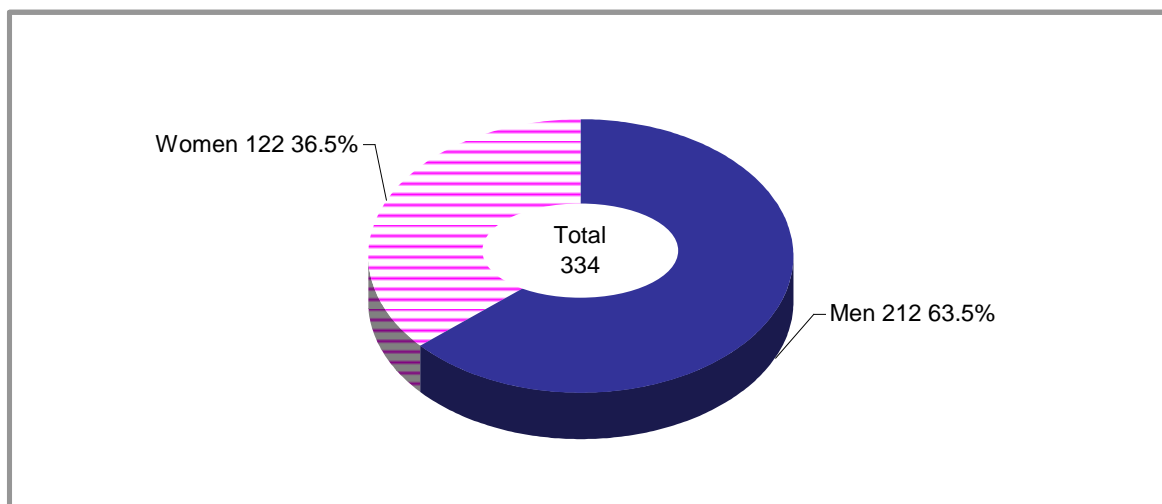
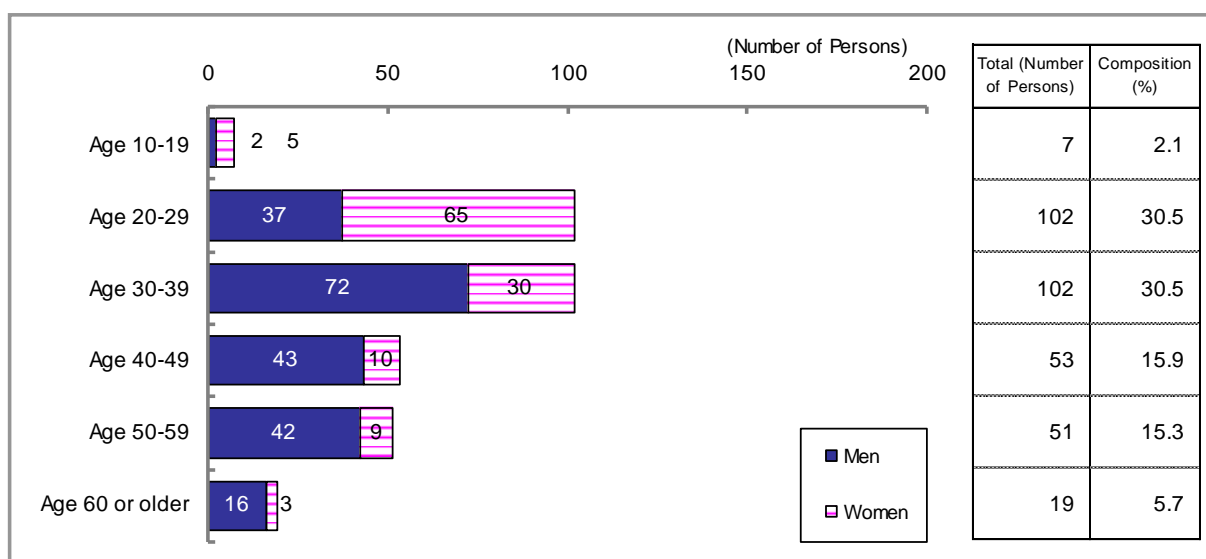


Chart 16 : Japan Tennis Association Registered Professional Players (By Gender and Age) in 2012



In 2012, there were 4,629 registered general players in total. There were more male players than female, with men comprising 65.8% of the total (Chart 17). The age groups of registered general players ranged from under 10 years old to 60 years or older, with disproportionately high percentages among those 10-19 years old and 20-29 years old. Players in their twenties were the largest age group. By gender and age groups, male players in their twenties were the largest group, with 1,268 players (Chart 18).

Chart 17 : Japan Tennis Association Registered General Players (By Gender) in 2012

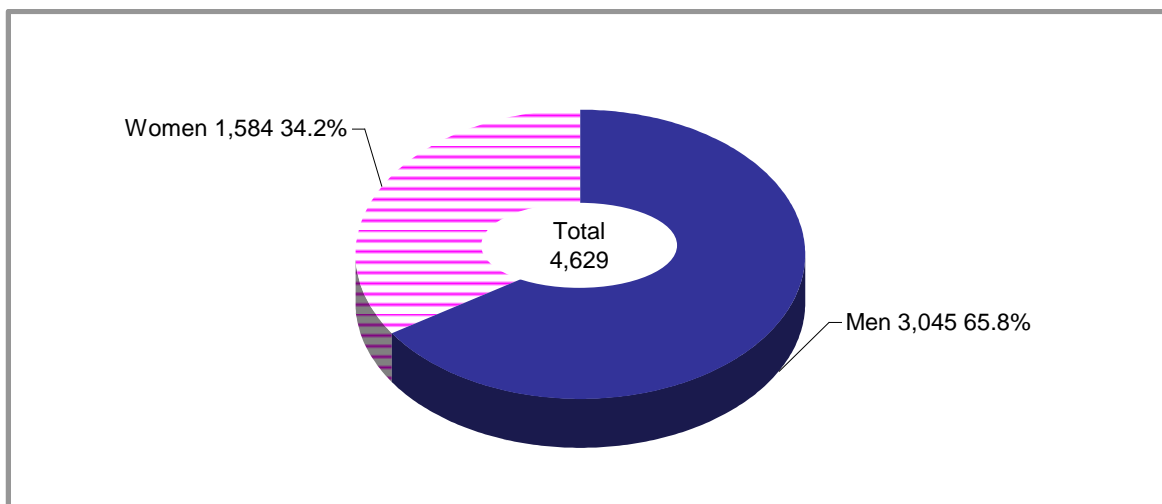
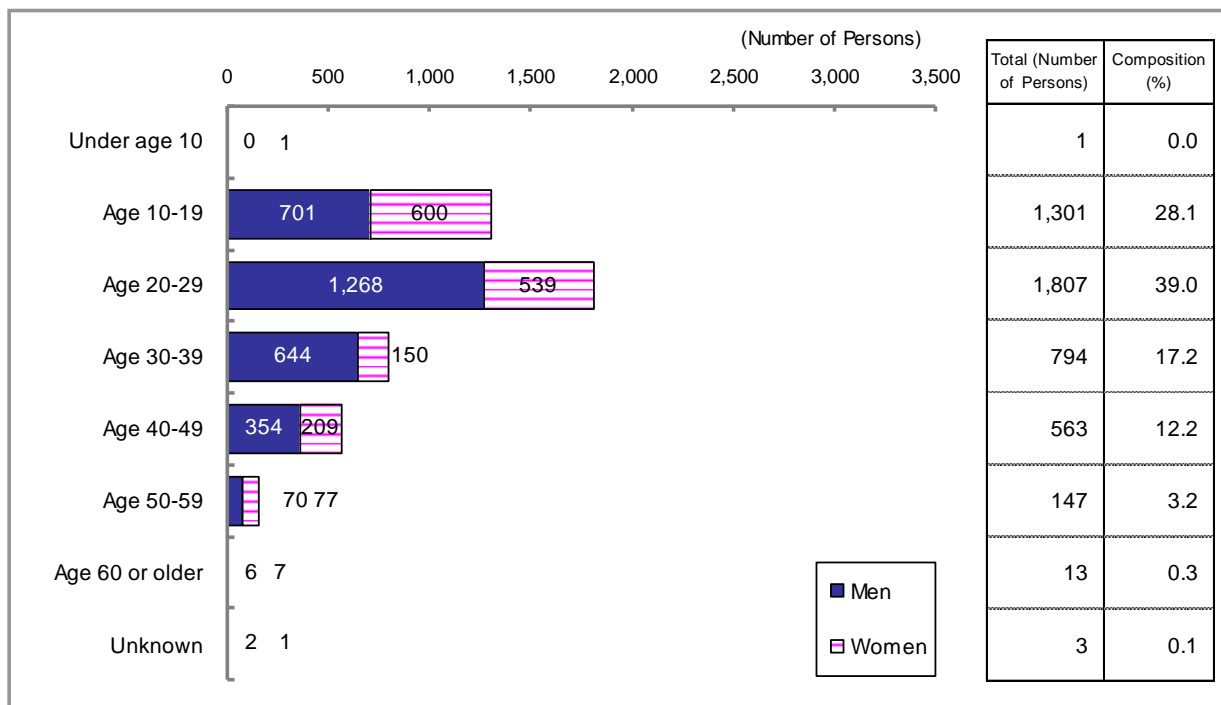


Chart 18 : Japan Tennis Association Registered General Players (By Gender and Age) in 2012



In 2012, there were 7,798 registered veteran players in total. There were more male players than female, with men comprising 59.9% of the total. However, female players were 40.1% of the total, which was larger than the female ratios found among professional and general players (Chart 19). The age groups of registered veteran players started from 30-39 years old, but 60 years or older was the largest group, with 3,218 players. By gender and age, male players aged 60 years or older were the largest group (Chart 20).

Chart 19: Japan Tennis Association Registered Veteran Players (By Gender) in 2012

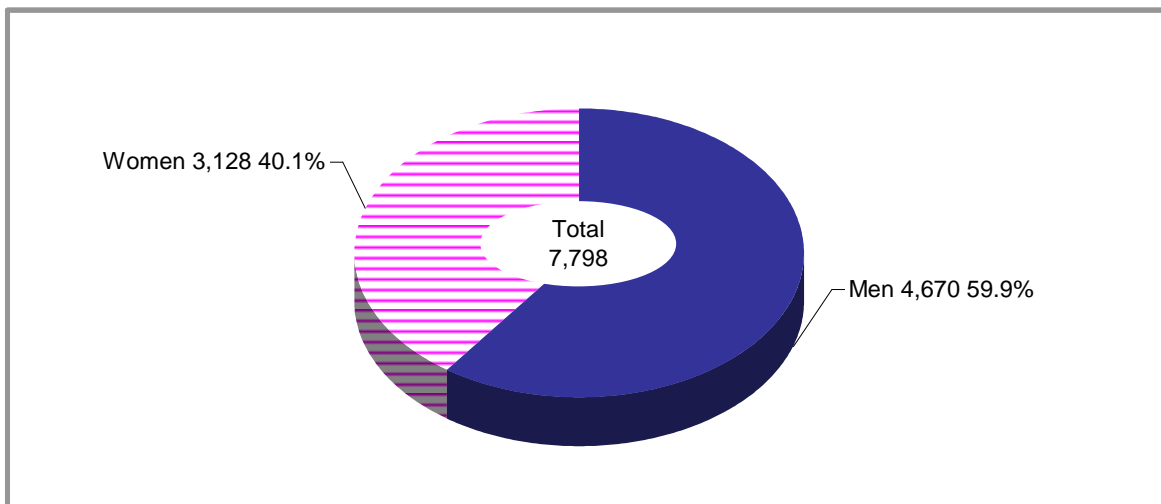
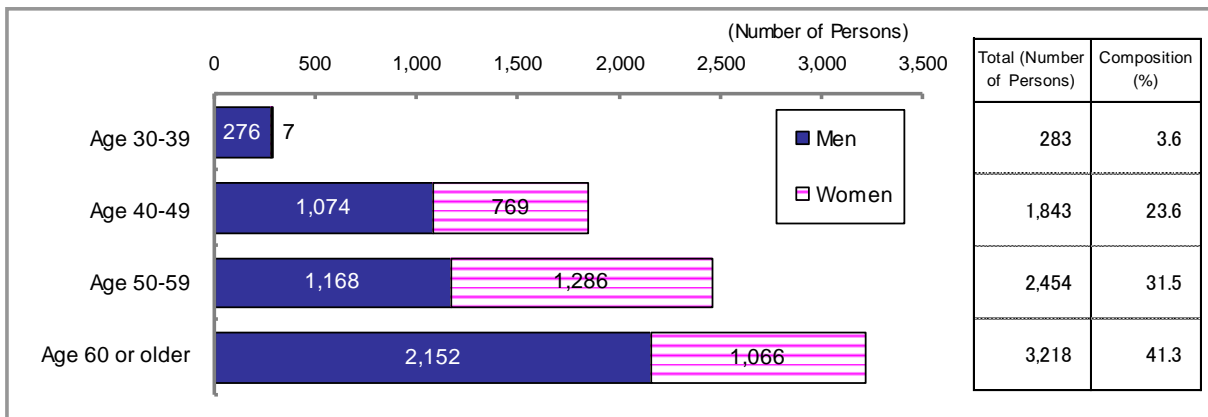


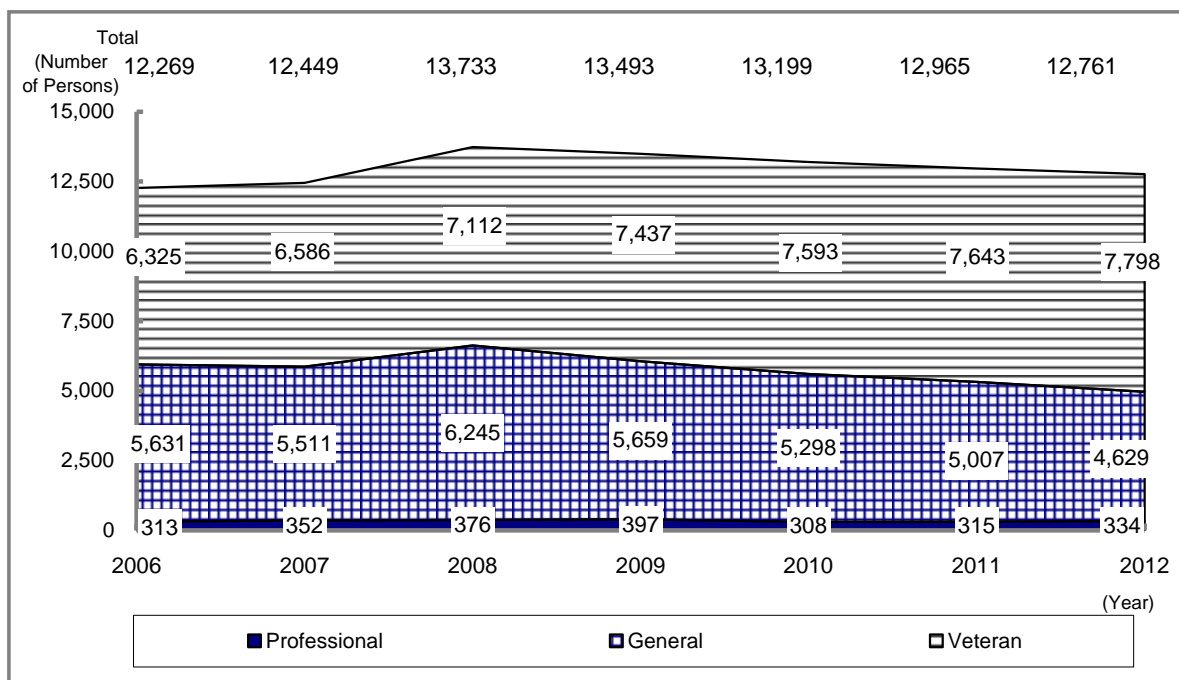
Chart 20: Japan Tennis Association Registered Veteran Players (By Gender and Age) in 2012



Changes in the number of registered players from 2006-2012 showed that the total number of registered professional, general, and veteran players increased to 13,733 in 2008 but gradually decreased thereafter. In 2012, the total was 12,761.

The number of registered professional players was the smallest of the three categories, with little fluctuation from year to year. Registered general and veteran players both increased in number in 2008 from the previous year, but since then general players have been on the decrease, while veteran players have been increasing in number. But the increase in veteran players was eclipsed by the decrease in general players, thus resulting in an overall and gradual process of ageing and decrease in the number of registered players (Chart 21).

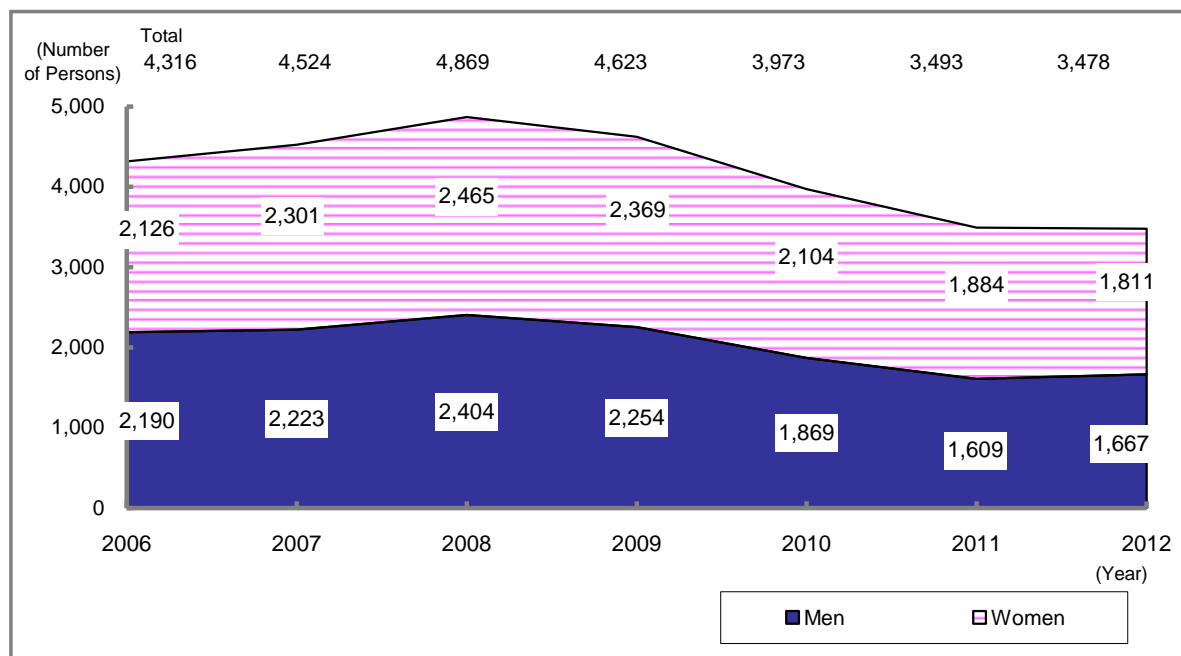
Chart 21 : Changes in the Number of Japan Tennis Association Registered Players (By Category)



(12) Court Officials, on the Decrease from 2008, Down to 3,478, while Instructors Remain Static at 5,491

In 2012, the Japan Tennis Association had 3,478 registered court officials. The number has decreased by 28.6% from 4,869 in 2008 (Chart 22).

Chart 22: Changes in the Number of Japan Tennis Association Court Officials (By Gender)

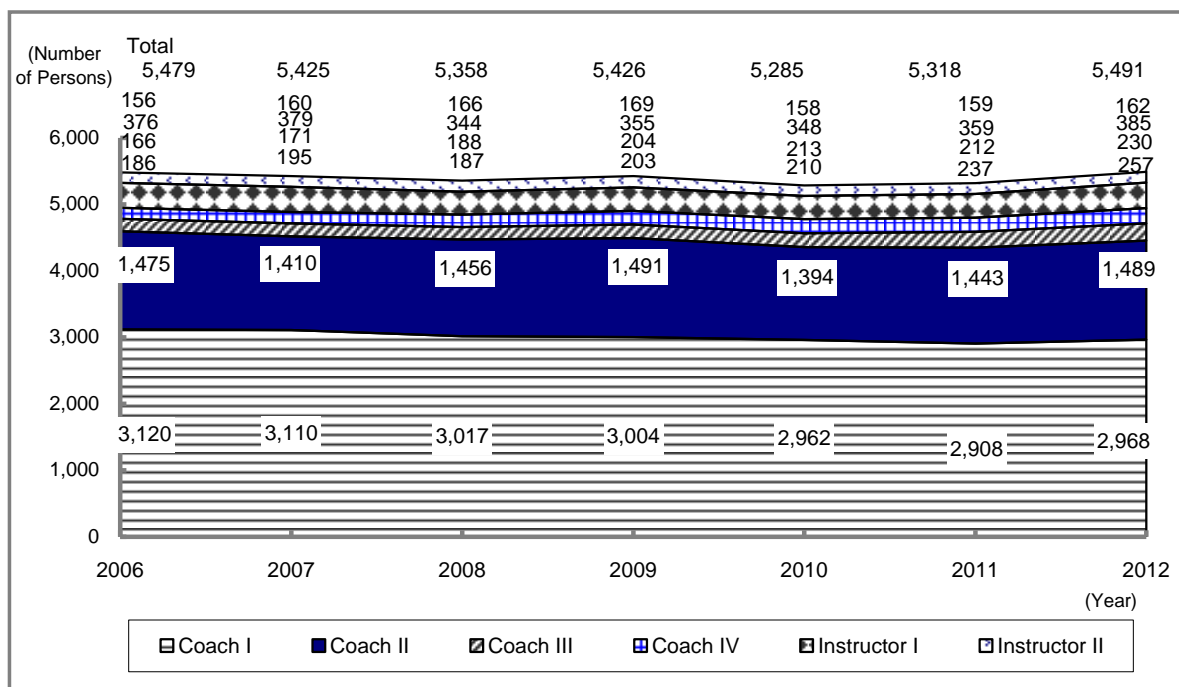


The Japan Tennis Association has established an Authorized Instructors Certification System with the following six designations, based on the uniform standards set by the Japan Sports Association for authorized sports leaders:

- Coach I: In each prefecture, they provide basic practical instruction for children and recreational tennis players from the beginner to the intermediate levels. They contribute to the popularization of tennis.
- Coach II: In each region or prefecture, they provide technical instruction depending on the age and skill level. They take part in the training of tennis coaches. They take on a central role as leaders in the popularization of tennis.
- Coach III: In each region or prefecture, they provide leadership for finding, developing, and fostering competitive players in the area. They contribute to the development of top tennis players.
- Coach IV: In each region or prefecture, they develop and foster top players in the area. They take on the central leadership role in each regional training center.
- Instructor I: At commercial tennis facilities, they provide basic practical instruction for players from beginners to the intermediate level. They take part in drafting and executing school instructor curriculum.
- Instructor II: At commercial tennis facilities, they provide technical instruction for all ages and skill levels. They take on central roles regarding operations and management of schools, drafting instructor curriculum, event planning, etc. They take part in training and developing tennis instructors.

In 2012, the Japan Tennis Association had 5,491 authorized instructors. The largest group was “Coach I” with 2,968, followed by “Coach II” with 1,489. There were 257 of “Coach III,” 230 of “Coach IV,” 385 of “Instructor I,” and 162 of “Instructor II.” The static numbers of authorized instructors from 2006 to 2012 showed that there were no significant changes (Chart 23).

Chart 23 : Changes in the Number of Japan Tennis Association Authorized Instructors (By Certification)

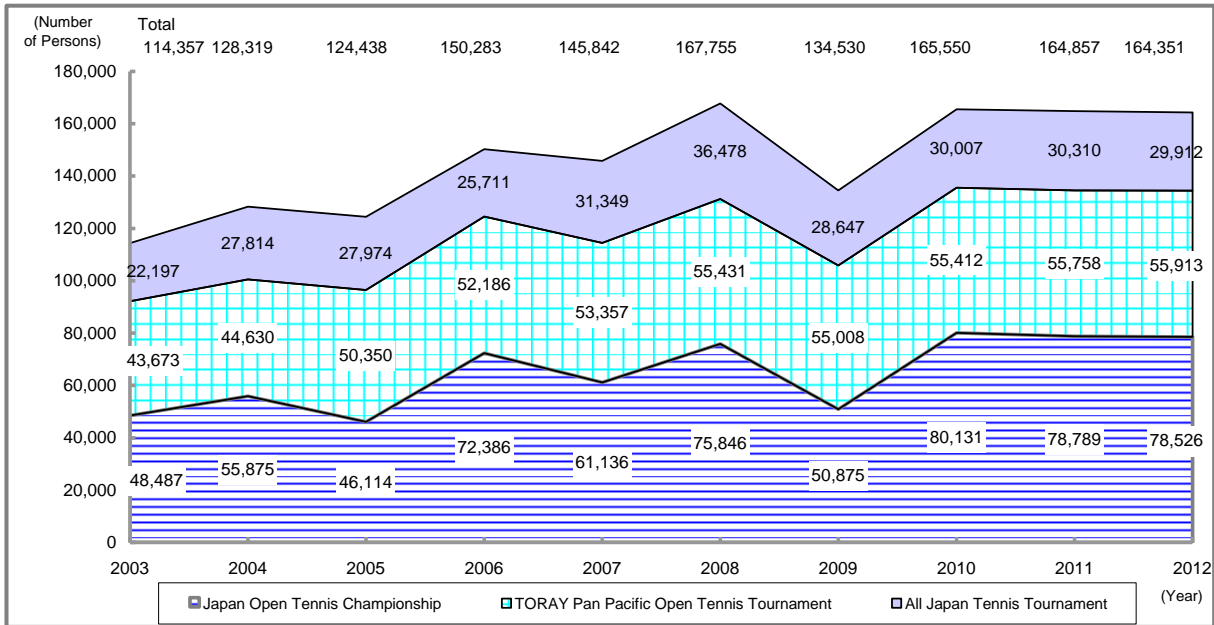


The Japan Tennis Association has an elite coach certification system. Elite coaches use the latest scientific theories and practical knowledge in tennis training, coaching, and management to train players active on the world stage. This is done through activities at the national training center, with the national team, and on professional tour coaching. The system was launched in 2008 and there were 42 “S-class Elite Coaches” as of February 2013. Of the 42 coaches, 37 were male and 5 were female.

(13) The Three Major Tennis Tournaments Attracted a Total of 164,000 Spectators in 2012, a 40% Increase from 2003

The number of spectators at the three major annual tennis tournaments in Japan — the Japan Open Tennis Championship, the TORAY Pan Pacific Open Tennis Tournament, and the All Japan Tennis Tournament — increased 43.7% during the past ten years from 114,357 spectators in 2003 to 164,351 in 2012 (Chart 24).

Chart 24: Changes in Number of Spectators for Three Major Tennis Tournaments



(14) Japan Tennis Association Budget: 1.5 Billion Yen for Fiscal Year 2011

In the fiscal year 2011, the expenditure of the Japan Tennis Association was some 1.5 billion Japanese yen, a 41.0% increase from 2003. The largest category was “tournament operations” at 66.5%, followed by “funding for player participation in international tournaments / performance development” at 10.2%, “administrative” at 9.6%, and “popularization of tennis” at 1.4%. The income breakdown by category showed that “tournament” was some 1.05 billion yen or 70.0% of the total, followed by “grant / commissioned projects” (9.8%), “registration fee” (3.7%), “publication” (1.4%), and “development” (1.3%) (Table 7).

Table 7 : Changes in Japan Tennis Association Budget

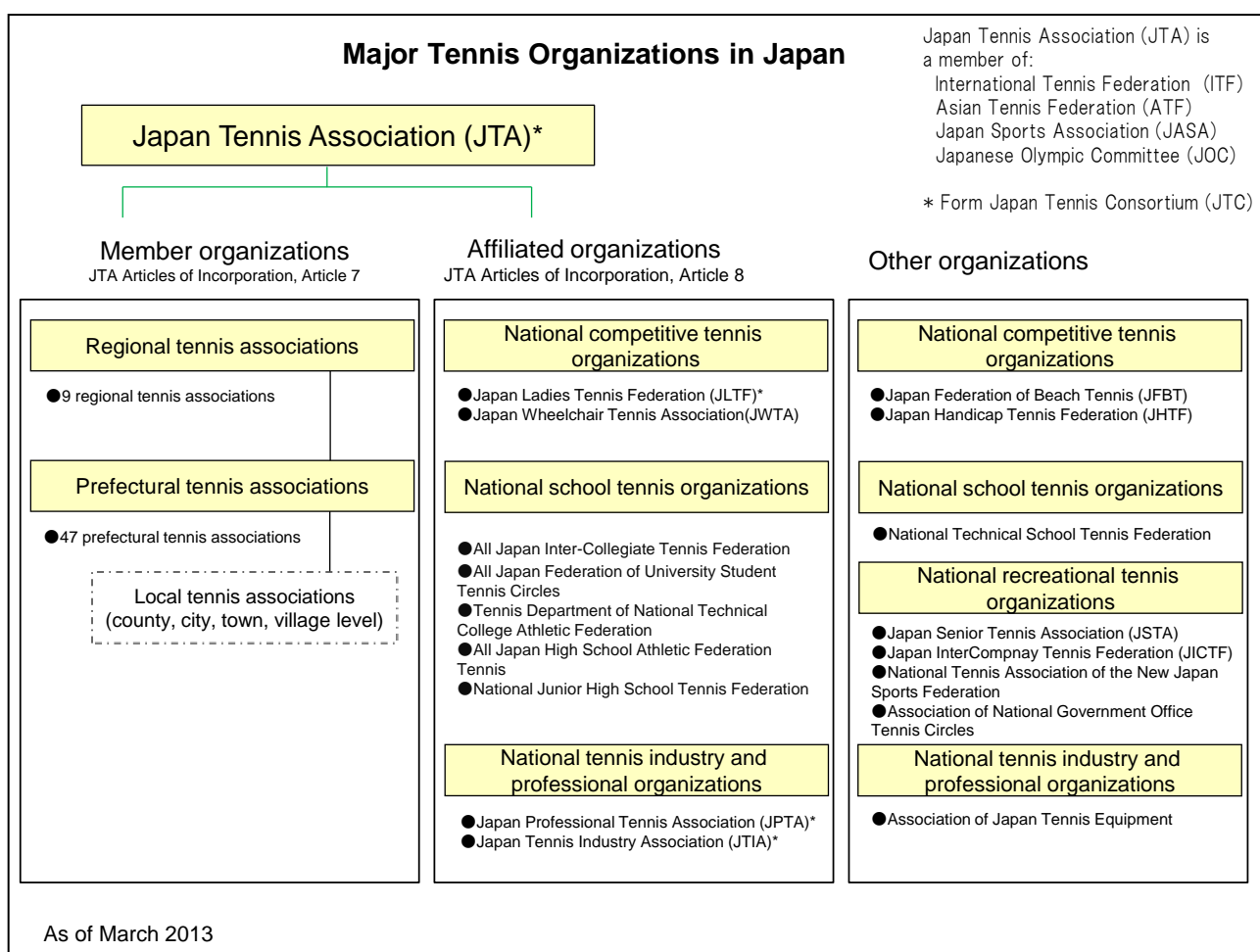
(Unit: Million Yen)

	Year 2003	Year 2004	Year 2005	Year 2006	Year 2007	Year 2008	Year 2009	Year 2010	Year 2011	Year 2011 Composition (%)
Expenditure Total	1,061 (100)	1,088 102.5%	1,195 112.6%	1,311 123.5%	1,245 117.3%	1,237 116.5%	1,332 125.5%	1,451 136.7%	1,497 141.0%	100.0%
Tournament Operations	676 (100)	693 102.5%	733 108.5%	818 121.1%	841 124.4%	834 123.5%	814 120.4%	942 139.5%	996 147.4%	66.5%
Administrative	126 (100)	139 110.2%	144 114.2%	137 108.8%	135 106.7%	131 103.7%	148 117.2%	156 123.9%	144 114.1%	9.6%
Funding for player participation in international tournaments / performance development	83 (100)	106 126.6%	108 129.2%	98 116.9%	92 109.7%	94 112.2%	95 113.8%	143 171.8%	153 183.0%	10.2%
Popularization of Tennis	21 (100)	15 73.8%	33 160.3%	35 167.8%	50 242.0%	39 187.3%	34 164.2%	26 127.6%	21 99.5%	1.4%
Other	109 (100)	86 79.0%	93 85.4%	168 154.6%	105 96.3%	100 92.0%	187 172.1%	124 113.9%	97 89.2%	6.5%
Expenditure Total (Within the Year)	1,015 (100)	1,039 102.4%	1,111 109.5%	1,256 123.7%	1,222 120.4%	1,198 118.0%	1,278 125.9%	1,392 137.2%	1,410 139.0%	94.2%
Roll-Over	47 (100)	49 104.8%	84 179.7%	55 118.1%	24 50.6%	39 84.5%	54 116.7%	59 126.4%	87 185.3%	5.8%
Income Total	1,061 (100)	1,088 102.5%	1,195 112.6%	1,311 123.5%	1,245 117.3%	1,237 116.5%	1,332 125.5%	1,451 136.7%	1,497 141.0%	100.0%
Tournament	718 (100)	731 101.8%	788 109.7%	848 118.0%	885 123.2%	913 127.1%	972 135.3%	1,056 147.0%	1,047 145.8%	70.0%
Donation	63 (100)	34 54.5%	76 121.1%	24 38.0%	23 36.2%	22 34.6%	16 25.4%	9 13.8%	4 6.4%	0.3%
Grant / Commissioned Projects	60 (100)	43 71.8%	39 65.4%	32 53.0%	27 45.1%	30 49.6%	52 87.8%	76 128.1%	146 245.2%	9.8%
Registration Fee	45 (100)	50 113.3%	51 114.2%	58 130.7%	58 130.6%	54 121.7%	54 122.0%	61 135.9%	55 123.2%	3.7%
Sponsorship	44 (100)	47 107.1%	48 109.2%	47 108.3%	45 103.6%	45 102.8%	45 102.3%	4 8.9%	3 7.8%	0.2%
Publication	28 (100)	31 110.7%	34 120.1%	29 104.9%	26 92.6%	24 85.4%	23 82.4%	23 83.3%	21 76.6%	1.4%
Development	27 (100)	20 71.9%	33 120.8%	55 203.8%	47 172.4%	13 48.8%	33 123.2%	23 86.2%	20 74.1%	1.3%
Other	48 (100)	85 177.3%	78 163.5%	133 278.8%	79 165.7%	112 235.3%	97 202.7%	145 303.1%	140 293.1%	9.4%
Income Total (Within the Year)	1,032 (100)	1,041 100.9%	1,146 111.1%	1,227 118.9%	1,190 115.3%	1,213 117.6%	1,293 125.2%	1,397 135.3%	1,438 139.3%	96.1%
Roll-Over	29 (100)	47 158.8%	49 166.5%	84 285.4%	55 187.6%	24 80.4%	39 134.3%	54 185.3%	59 200.7%	3.9%

(15) Tennis Organizations Have 400,000 Registered Players/Members in Total

The Japan Tennis Association requested seventeen tennis organizations to provide data on their membership and registered players as part of the “Research of the Tennis Environment in Japan,” its special project of 2012. These seventeen tennis organizations are divided into four categories, namely “national competitive tennis organizations,” “national school tennis organizations,” “national recreational tennis organizations,” and “national tennis industry and professional organizations.” The chart below shows the relationship between the seventeen organizations and the Japan Tennis Association, regional tennis associations, and prefectural tennis associations (Chart 25).

Chart 25: Major Tennis Organizations in Japan



There were 400,842 registered players/members in the 69 tennis organizations (Japan Tennis Association, 9 regional tennis associations, 47 prefectural tennis associations, Japan Ladies Tennis Federation, Japan Wheelchair Tennis Association, Japan Federation of Beach Tennis, 6 national school tennis organizations, 3 national recreational tennis organizations) (may include those who are registered or members in multiple organizations, Table 8).

Table 8: Number of Registered Players/Members in Major Tennis Organizations in Japan

a) Japan Tennis Association and regional/prefectural tennis associations		(Number of Persons)
Japan Tennis Association	Professional	334
	General	4,629
	Veteran	7,798
	Total	12,761
Regional tennis associations (*Include those who are registered with prefectural tennis associations, as well as in multiple categories)	Junior	31,126
	General	5,672
	Total	36,798
Prefectural tennis associations (*Include those who are registered with regional tennis associations, as well as in multiple categories)	Junior	49,959
	General	51,445
	Veteran	4,668
	Other	11,643
	Total	117,715
b) National competitive tennis organizations		(Number of Persons)
Japan Ladies Tennis Federation	Member	34,502
Japan Wheelchair Tennis Association	Member	405
Japan Federation of Beach Tennis	Registered player	740
c) National school tennis organizations		(Number of Persons)
*some regions missing		
All Japan Inter-Collegiate Tennis Federation *	Member	7,497
All Japan Federation of University Student Tennis Circles*	Registered player	24,000
Tennis Department of National Technical College Athletic Federation	Member	1,681
All Japan High School Athletic Federation Tennis	Member	101,296
National Junior High School Tennis Federation	Member	44,978
National Technical School Tennis Federation *	Registered player	379
d) National recreational tennis organizations		(Number of Persons)
Japan Senior Tennis Association	Member	10,662
Japan InterCompnay Tennis Federation	Registered player	1,896
National Tennis Association of the New Japan Sports Federation	Member	5,532
a)-d) Total number of registered players/members		400,842
e) National tennis industry and professional organizations		(Number of Persons)
Japan Professional Tennis Association	Full member	1,528
	Associate member	11
Japan Tennis Industry Association	Tennis producer	142

(a) Japan Tennis Association and Regional / Prefectural Tennis Associations

1 Japan Tennis Association

It is a public-interest incorporated foundation governing tennis in Japan as a national sporting organization. It was established in 1922 as "*Nippon Teikyu Kyokai*," a voluntary organization. At the time of developing itself into an incorporated foundation in 1980, its name was changed into the present one. In the framework of the reform of public-interest corporations by the government, the Japan Tennis Association was transformed into a public-interest incorporated foundation in April 2012. It is a member of the Japanese Olympic Committee, the Japan Sports Association, the International Tennis Federation and the Asian Tennis Federation.

The number of persons such as directors, auditors, councilors, officials with director status, division directors, deputy division directors, committee chairs, and committee members who participated in the association's activities, totaled approximately 550 (based on a member list, may include those who play multiple roles) in the year 2011-2012. Almost all were volunteers. The number of those working in the secretariat was 15, including temporary staff and part-timers.

2 Regional and Prefectural Tennis Associations

Regional tennis associations govern tennis in each of the nine regions of Japan. They are voluntarily established by the prefectural tennis associations of each region. Therefore their organizational, operational, and business activities differ amongst regional associations. The Kanto and Kansai Tennis Associations, the oldest of all, were established in 1922. Prefectural tennis associations govern tennis in each respective prefecture. The Shizuoka and Osaka Tennis Associations, the oldest of all, were established in 1945.

Although they are autonomous independent organizations, regional and prefectural tennis associations take charge of the promotion of tennis in their respective regions and prefectures as members of the Japan Tennis Association, playing important roles in the development of tennis in Japan. The jurisdictional demarcation of each regional tennis association more or less corresponds to the geographical divisions of Japan. However, the following prefectures belong to regions that differ from the conventional regional groupings: Niigata, Nagano, Toyama, Ishikawa and Fukui prefectures form the Hokushinetsu Tennis Association; Shizuoka, Gifu, Aichi, and Mie prefectures organize the Tokai Tennis Association; and Yamanashi prefecture comes under the Kanto Tennis Association. The Hokkaido Tennis Association performs the function of both regional and prefectural associations due to its geographical situation and for other reasons.

As a member of the Japan Tennis Association, each regional tennis association is given the right to recommend a director candidate to the Board of Directors, whereas each prefectural tennis association is given the right to recommend an expected councilor candidate to the Board of Councilors.

(b) National Competitive Tennis Organizations

1 Japan Ladies Tennis Federation (JLTF)

It is a nonprofit voluntary organization for female professional and amateur tennis players and aims to popularize and vitalize tennis. It was formed in 1968 as “*Joshi Teikyu Kyokai*” and its name was changed into “*Nippon Joshi Teikyu Renmei*” in 1977 and then into the present name “*Nippon Joshi Tenisu Renmei*” or the Japan Ladies Tennis Federation. It is an affiliated organization of the Japan Tennis Association and forms the Japan Tennis Consortium jointly with the Japan Tennis Association, the Japan Tennis Industry Association, and the Japan Professional Tennis Association.

2 Japan Wheelchair Tennis Association (JWTA)

It was established in 1991 as the national organization that governs wheelchair tennis in Japan. Its purpose is to improve the environment for recreational and competitive tennis played by persons with disabilities and to encourage their public participation in and contribution to society through the medium of wheelchair tennis. It is an affiliated organization of the Japan Tennis Association and a member of the International Wheelchair Tennis Association. However, the Japan Tennis Association represents the JWTA when the latter sends competitors to tournaments organized by the International Tennis Federation.

3 Japan Federation of Beach Tennis (JFBT)

It is a general incorporated association which supervises and represents the beach tennis community in Japan. In January 2013, efforts were launched to popularize beach tennis in Japan and organize international and domestic beach tennis tournaments in earnest, and the Japan Beach Tennis Association and the then Japan Beach Tennis Federation were integrated to establish the JFBT.

It is not a member or affiliated organization of the Japan Tennis Association, but JFBT cooperates with the Japan Tennis Association’s beach tennis committee. The Japan Tennis Association represents the JFBT when the latter sends competitors to tournaments organized by the International Tennis Federation.

4 Japan Handicap Tennis Federation (JHTF)

It was established in 1981 as a specified nonprofit organization with the purpose of developing tennis playing opportunities for handicapped persons as well as for a wider demographic that includes elderly persons and children. It also aims to foster a good sporting environment and promote the disclosure of relevant information. In addition, its purposes include carrying out educational campaigns to popularize technologies and providing know-how for life-saving not only at places where tennis is played but also at times of emergency.

(c) National School Tennis Organizations

1 All Japan Inter-Collegiate Tennis Federation

It was established in 1931 as an autonomous national organization run by university students. It governs the activities of university official tennis teams. It is an affiliated organization of the Japan Tennis Association.

2 All Japan Federation of University Student Tennis Circles

It was established in 1983 as a national organization, a federation of associations by members of recreation-oriented university tennis circles. It is governed by region (Hokkaido, Tohoku, Kanto, Tokai, Kansai, Chushikoku, and Kyushu, though Chushikoku federation no longer exists). It is an affiliated organization of the Japan Tennis Association.

3 Tennis Department of National Technical College Athletic Federation

It was established in 1948 as a national organization of tennis run by teachers and staff members of technical colleges. They organize themselves into one of 14 sport departments within the National Technical College Athletic Federation that oversees the participation of technical college students. It is an affiliated organization of the Japan Tennis Association.

4 All Japan High School Athletic Federation Tennis

It was established in 1955 as a national organization of tennis run by teachers and staff members of senior high schools. They organize themselves into one of 33 sport departments of All Japan High School Athletic Federation. It is an affiliated organization of the Japan Tennis Association.

5 National Junior High School Tennis Federation

It was established in 1987 as a national organization of prefectural tennis federations for junior high school tennis clubs and their members. It is run by teachers and staff members of junior high schools. It aims to popularize and promote tennis at junior high schools and to cultivate mutual friendships between member schools. Since it is not affiliated to the Nippon Junior High School Physical Culture Association which governs athletic and sporting activities by junior high school students, tennis (lawn) is not included as a competitive event in the National Junior High School Physical Education Meet. It is an affiliated organization of the Japan Tennis Association.

6 National Technical School Tennis Federation

It is a national organization of prefectural technical school tennis federations for technical school tennis clubs and their members. It is run by teachers and staff members of technical schools. It belongs to the National Technical School Athletic Federation.

(d) National Recreational Tennis Organizations

1 Japan Senior Tennis Association (JSTA)

It is a specified nonprofit organization which aims to deepen mutual friendship through the medium of tennis among members who are aged at 60 or more in the case of males and 50 or more in the case of females. It aims to promote healthy lives, popularize and develop tennis among elderly persons and contribute to international friendship. Its activities are carried out in 12 regions of Japan. It was originally created under the name of “Senior Tennis Paradise” in 1993 and later transformed into the present corporation in 2003.

2 Japan InterCompany Tennis Federation (JICTF)

It is a tennis friendship organization established in 1986 for the development of amateur tennis into a life-long sport for working adults, by working adults and for working adults by providing them with tennis as a means for social interaction. In eight regions (Hokkaido, Hokushinetsu, Kanto, Tokai, Kansai, Chugoku, Kitakyushu, and Minamikyushu) of Japan, JICTF organizes regional federations.

3 National Tennis Association of the New Japan Sports Federation

The New Japan Sports Federation is a nonprofit voluntary organization which actively advocates for healthy attitudes toward tennis and the promotion and improvement of tennis theories and tennis skills as part of a sound and enlightened life. Established in 1965 under the name of “*Shin Nippon Taiiku Renmei*,” its name was changed into the present one on the occasion of its 30th anniversary. As of 2012, it has been composed of 13 sporting organizations and 25 prefectural and regional organizations. The National Tennis Association is the tennis branch of the New Japan Sports Federation.

4 Association of National Government Office Tennis Circles

It was established in 1958 as a friendship organization by recreational tennis players who work for central government offices and other state organs. It promotes friendship among its members through tennis and aims to improve tennis skills.

(e) National Tennis Industry and Professional Organizations

1 Japan Professional Tennis Association (JPTA)

It is a public-interest incorporated association with a membership consisting of professional tennis coaches and players. It trains and qualifies professional and general instructors, as well as develops professional, junior, and recreational tennis players. Established in 1972 as a joint stock company, it transformed into an incorporated association in 1989, and then into a public-interest incorporated association in 2012. It is an affiliated organization of the Japan Tennis Association and forms the Japan Tennis Consortium jointly with the Japan Tennis Association, the Japan Tennis Industry Association, and the Japan Ladies Tennis Federation.

2 Japan Tennis Industry Association (JTIA)

It is a public-interest incorporated association with a membership consisting of corporations and individuals that operate tennis businesses, as well as organizations that have such corporations and individuals as their members. Its purpose is to seek the sound development of the tennis business and improve the social profile of commercial tennis business operators. The number of regular corporate members is 206 and that of supporting members totals 65. These regular corporate members are tennis business operators in 23 prefectures and most are situated in Kanto District prefectures such as Tokyo, Saitama, and Kanagawa.

Established in 1988 as a voluntary organization under the name of “Japan Tennis Club Federation,” in 1992 it transformed into an incorporated association named “Japan Tennis Industry Association,” and then into a public-interest incorporated association in 2012. It is an affiliated organization of the Japan Tennis Association and forms the Japan Tennis Consortium jointly with the Japan Tennis Association, the Japan Professional Tennis Association, and the Japan Ladies Tennis Federation.

3 Association of Japan Tennis Equipment

It was established by 11 tennis equipment manufacturers in September 2012 as a special department of the Association of Japan Sporting Goods Industries. Its purpose is to strengthen cooperation among tennis equipment manufacturers and to work on establishing a sound market through tennis market vitalization and greater demand from the perspectives of distribution, the environment, and consumers.

(f) Other Tennis Organizations

1 Japan Tennis Consortium (JTC)

It is a consultative organization established in 2009 by four national tennis organizations (Japan Tennis Association, Japan Tennis Industry Association, Japan Professional Tennis Association and Japan Ladies Tennis Federation) to take up and discuss issues which exist horizontally across the Japanese tennis community. The presidents of the four organizations hold meetings every two months. Among the issues taken up in its action plans are the unification of the certification systems for players and coaches, compliance, ethics and improvement of the certification programs for, and quality of players / instructors. It also aims to formulate concrete measures for the establishment of an organizational structure to enable the four organizations to act coherently in the field of player development and tennis popularization.

3. Concluding Remarks by the Project Team on the Research of the Tennis Environment in Japan

(1) The Tennis Population Is Shrinking amid a Deteriorating Tennis Environment

Our colleagues in the tennis community have been discussing the deterioration of the tennis environment in Japan for the past several years. Unfortunately, the data collected by our study proved that their concerns were founded in fact. The number of tennis court facilities has decreased by one-third over the period of thirteen years from 1996 to 2008. The number of places where people can play tennis is indeed on the decline. The Basic Act on Sports in Japan says that sport is a common culture that the world shares, and that playing sport is a right for all people. However, the situation of tennis in Japan is at odds with the spirit of the Basic Act on Sports.

Compared to other sports, it is said that tennis in Japan has been heavily dependent on workplace facilities and commercial tennis business operators. The prolonged deflationary period of the Japanese economy has worsened the business environment for many private companies and commercial tennis business operators, resulting in the closure and reduction of tennis courts. And for commercial tennis business operators, the fixed property tax and inheritance tax have long been business burdens.

It is valid to assume that some structural changes are in progress in the commercial tennis business industry due to the worsened business environment and shifts in recreational tennis players' needs. A tennis business expert mentioned that especially in metropolitan areas recreational tennis players tend to choose tennis schools with indoor tennis courts that are shielded from bad weather. Meanwhile, membership tennis clubs have been forced to shut down their businesses. In our study, some commercial tennis business operators pointed out that they are in competition with public tennis facilities. On the other hand, some operators seem to have taken on new challenges to survive. Some have started to manage public tennis courts under the "System of Designated Managers," trying out a new business model that includes the use of public courts. Others are increasing the number of tennis schools to widen their business coverage.

A decrease in the number of places where people can play tennis will lead to fewer opportunities to play. It will result in a declining tennis population. The tennis population is seeing a decrease in numbers and the ageing of its players over the long run. We expect a large drop when the baby boomers retire from their tennis careers in the near future. In addition, since tennis is not included as an official sport of the National Junior High School Physical Education Meet (i.e. tennis is not part of the Nippon Junior High School Physical Culture Association), promotion of the sport among junior tennis players, especially ages 12-15, is being impeded.

Japan is experiencing a population decrease, a decline in the birth rate, and the ageing of the population. However, these problems are not the only reasons for the decrease in the tennis population. The social environment that surrounds tennis is also changing. Diversifying hobbies, changes in lifestyle, and reduced income due to the worsened economy and employment situation all have contributed to the decrease in the tennis population. The problem is multi-faceted and complex. Our colleagues in Western countries with a rich tennis culture are also experiencing a decline in their tennis populations. In fact, a decrease in teen tennis players was reported in a

seminar hosted by the International Tennis Federation in November 2012.

(2) Some Good News for the Tennis Community in Japan

The JTA study confirmed some good news for the tennis community in Japan as well. The number of those who would like to start or continue playing tennis in the future is about twice more than the current tennis population, indicating the possible emergence of a new group of recreational tennis players. The number of “regular” tennis players remains static, a testament to their commitment to the sport.

Focusing on the prospect of an increase in recreational tennis players by expanding the tennis population from bottom-up, the study showed that about 10% of tennis school students are children under 10 years old. It also proved that tennis business operators, especially tennis schools, are very interested in the PLAY + STAY, a program the Japan Tennis Association promotes for introducing tennis to children under 10. In addition, it is good news for tennis that, though the tennis population is in decline, the number of tennis instructors is not decreasing, a trend that suggests positive dividends in terms of popularization of the sport.

(3) Expanding the Tennis Population

There is a segment of potential recreational tennis players: i.e., those who want to start or go back to playing tennis. And this indicates the possibility of an expanding tennis population in the future. The recreational tennis players who regularly play tennis have not decreased in number, but the tennis population in general is in decline. This implies that the shrinking segment consists of recreational tennis players who play tennis less frequently, such as tennis beginners or casual players who do not belong to any tennis organizations.

While the tennis population is ageing, the 20-29 year old age group still represents a large portion of the tennis population. School tennis organizations’ membership data shows that high school tennis teams (All Japan High School Athletic Federation Tennis) have over 100,000 members, but the number drops off in tennis teams of colleges, universities, technical colleges, and technical schools. Additionally, the 20-29 year old age group is smaller than others in terms of their membership in tennis clubs and tennis schools. These facts indicate that many tennis players in their twenties are casual tennis players who are not playing in organized groups. Campaigns that court potential and less frequent, casual recreational tennis players would help to reverse the declining trend of the tennis population, in addition to removing institutional impediments.

There is a tennis population consisting of children under the age of 10. Tennis business operators are interested in PLAY+STAY. In order to expand the tennis population from the bottom-up, it will be necessary to trigger interest in tennis among young children under 10 and to maintain an environment where they can first experience and then continue to play tennis. This is why continuation of PLAY+STAY campaigns is essential. In order to expand the teen tennis population, we also need to promote so that tennis is included as an official sport of the National Junior High School Physical Education Meet (by joining the Nippon Junior High School Physical Culture Association). This will mean that children can continue to play tennis as an extracurricular

activity when they enter junior high school.

(4) What the Japan Tennis Association Should Do

The shrinking tennis population and deteriorating tennis environment (such as the decrease in number of tennis courts) mean fewer playing opportunities for recreational tennis players. These pose management problems for tennis organizations and tennis business operators. It is the time for the Japanese tennis community as a whole to collectively acknowledge the background and causes of the deteriorating tennis environment, and work together to solve the problems.

As members of the Japan Tennis Association, the regional and prefectural tennis associations play an important role in popularizing and promoting tennis. However, many of these associations face the problem of a reduced tennis population, decreasing numbers of registered players, and fewer participants in tournaments in their areas. Most of the management and operational tasks of these associations are made possible through the support of volunteers, and yet they are struggling to find volunteers while, in the meantime, their current board members are ageing. On the other hand, the Japan Tennis Association is differently positioned from the regional and prefectural associations in that it has an independent financial source, is able to secure volunteers, and institutionally benefits from being a national competitive sport organization.

In April 2012, the Japan Tennis Association became a public-interest incorporated foundation. The Article 4 of the JTA's Articles of Incorporation says that "the purpose of the Foundation is to popularize and promote tennis as an organization that supervises and represents the tennis community in Japan, and thereby serve for and contribute to people's sound mental and physical development as well as the international community." In transitioning to become a public-interest incorporated foundation, the Japan Tennis Association declared that it will implement programs for the development of tennis as a life-long, competitive, and spectator sport, for the benefit of the public interest. The role it should play in promoting tennis and removing the social and institutional impediments that the sport faces now is larger than ever. It is the JTA's duty to lead the movement in halting deterioration of the tennis environment, while working toward popularizing and promoting tennis, and contributing to the development of the physical and mental health of the Japanese people.

The London 2012 Summer Olympics underscored the importance of sport in society and left a strong impression among the Japanese people that winning medals is important for popularizing and promoting a sport. In that regard, the improvement of performance levels is more important than ever for all competitive sport organizations. As a public-interest incorporated foundation, the Japan Tennis Association should reaffirm the significance of implementing programs intended to improve performance. Success by Japanese competitive tennis players in international tournaments would bring pride, joy, dreams, and excitement to the Japanese people. This would elicit the general public's interest in tennis, lead to greater popularization of the sport, contribute to the welfare of the sporting community, and foster sound mental and physical development of the people as well as the ties of friendship to the international community.

(5) Recommendations

In closing the Report on the Tennis Environment in Japan, the project team recommends that the Japan Tennis Association take the following actions for the sake of the future of tennis in Japan:

- i. Assume leadership in taking action and working together with other stakeholders in Japanese tennis in order to remove the social and institutional impediments that are hindering the popularization of tennis. The actions would include lobbying to the government agencies in charge. In order to have tennis included as an official sport of the National Junior High School Physical Education Meet, the Japan Tennis Association will continue to work with the National Junior High School Tennis Federation.
- ii. Carry out campaigns to raise awareness of the characteristics¹ of tennis and its social and educational benefits. These will include actions to achieve for tennis a position that commands respect at the city, ward, town, and village levels.
- iii. Better promote the PLAY+STAY program with a view toward expanding the tennis population from the bottom-up.
- iv. Implement activities to increase media coverage of tennis to make it a popular, major sport. The actions should include media strategies to seize three opportunities: signs of economic recovery in Japan, Japanese competitive tennis players' winning at international tournaments, and the organizational change of the Japan Tennis Association as it completes the transition to fully serve as a public-interest incorporated foundation.
- v. Redefine how it shares responsibilities with regional and prefectural tennis associations. Reinforce and develop the Japan Tennis Association's relationships with other tennis organizations.
- vi. Encourage the organization of local tennis associations at the city, ward, town, and village levels through prefectural associations.
- vii. Clarify the purpose, target, expected outcome, and procedure when implementing programs that include the popularization of tennis and performance development of competitive players. And verify the subsequent effectiveness of such programs.
- viii. Improve the research, planning, and operational competencies of the organization.
- ix. Set up an action plan and budget that factor in the importance of popularizing tennis.
- x. Establish and maintain self-governance and compliance in operations and management of the organization as a public-interest incorporated foundation.
- xi. Conduct basic research on the tennis environment regularly to achieve the given role of the Japan Tennis Association and verify the results of programs. Conduct special studies focused on particular subjects as needed.

¹ Characteristics of tennis: Regardless of gender, age, skill, or disability, anyone can participate in this international, traditional, popular, and Olympics sport at any time in life. It is a national sport that can serve for and contribute to people's sound mental and physical development as well as the international community.

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