
CURRENT STATUS & PERSPECTIVE OF THE SPORTS INDUSTRY IN KOREA, U.S., AND JAPAN

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Key Words: Sports, Sport Industry, disposable income, GNSP, GDSP

Abstract

The purpose of this paper is to identify current trends in the sport industry in Korea, U.S. and Japan and to also analyze the potential of the sport industry in the 21st Century. This paper analyzes the current sport related index of Korea, U.S. and Japan and the effect of scientific development. Scientific development has provided prosperity to modern societies and has thus increased the personal disposable income and leisure time available to people living in these societies. Many people spend their leisure time on sports related activities and the number is growing day by day and this situation makes the sports market a very attractive and important business sector in the world.

Considering the increase of household income and leisure time and the introduction of a five-day working week system, the sports market potential growth will be considerable and it is certain the demand for sports related activities, services and products will also show increases in the 21st Century. This paper estimates that sports expenditures could be estimated at \$10 billion in Korea, \$150 billion in U.S and 4.3 billion yen in Japan. The general trends currently in action in the sport industry estimate that these numbers are growing rapidly and the relative importance of the sport industry among all industries is becoming one of the most important new emerging markets in the world.

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I . Introduction

Increase of personal disposable income, leisure time and the introduction of a five-work-day system based on economic development stimulate the sport related activities of modern people, which has resulted in pronounced economic effects. Thus, Sport has become one of the major industries which is a fusion of industry, life and culture in 21st Century.

The numbers of sport participants among the western societies are worthy of notice. Almost 70% of the population regularly participated in sport activities and sport related industries share 0.5% -2% of whole national economic scale in the societies.

Sport activities stimulate supply and demand of commodities and services and induces employment effectively.

Sport has become a very promising industry sector in Korea which best showed promise in what is termed Korea's Era of Professional Sport in the 1980s, which included such milestones as the hosting of the 86 Asian games and the 88 Olympic games and the hosting of the 2002 world cup.

Korea anticipates a \$20,000(GNP) before 2005 and the number of sport participants is dramatically increasing. More than 50% of Koreans participated in sport related activities in Korea (Ministry of culture and tourism, Korea, 2002).

The purpose of this paper is to provide strategies for the development and increase of the efficiency of the sport industry through study of the current sport industry in Korea, U.S. and Japan.

II . Significance and Characteristics of the sport industry?

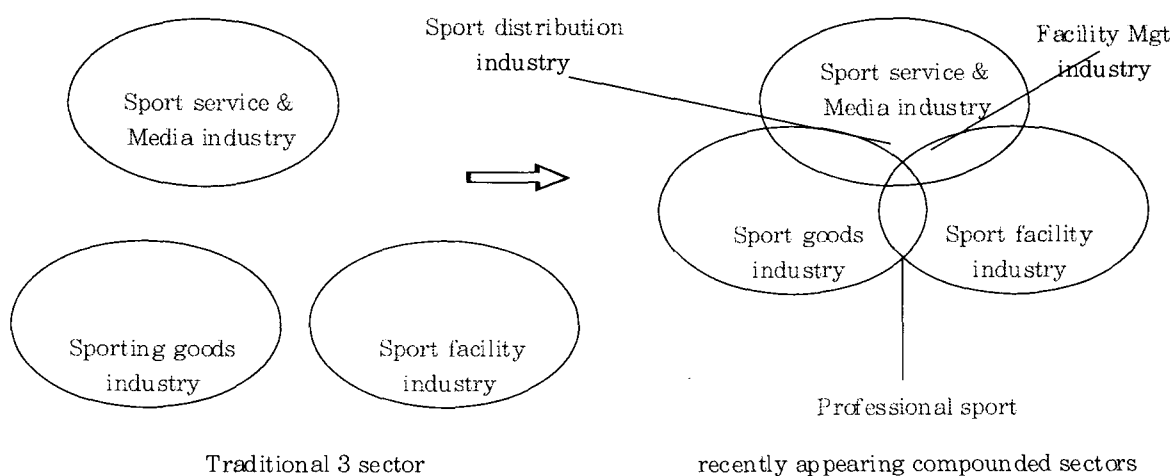
2.1 The Significance of the sports industry

The Sport industry can be defined as the creation of value added sport activities through the production and distribution of sport commodities and services. Even though, Sport is not classified in the industrial sector, sports related manufacturing, facilities, services, events, tour, advertising, IT, and insurance are classified as the sport industry.

Park(1997) defined the Sport industry as commercial production or production and distribution activities for supply and demand as related to sport activities.

Kim, et al.(1998) argued that "sport could be marketed by the demand of participants and spectators. So the sports industry is a value added industry through production and distribution of sport related commodities and services".

Figure 1. Structural Changes in the Sports Industry in Japan



The Ministry of Trade & Industry (Japan) argued that the sports industry consists of the manufacture and distribution of sport goods, sport facilities and construction, sport information (journalism, membership sales, Events etc). In addition, Harada(1995)^p classified sport industry as three categories: (1) Sport equipment

business, (2) Sport service and information business, (3) Sport facilities business.

Based on goods and types of purchaser, Pitts, Fielding & Miller(1997) classified the sport industry as following categories: (1) sport behavior sector, (2) sport goods manufacturing sector and sport (3) promotion sector.

Table 1. Classification of sport goods based on goods and types of purchaser

Sector	Characteristics	Categories
Sport behavior	Sports goods provided as participation or spectacle	<ul style="list-style-type: none"> •Athletics - amateur, professional sport •Private non-sport business •Tax supported sport and public sport organization •Sponsor for sport organization •Sport education •Fitness - sport firms
Sport goods manufacturing	sports goods for performance	<ul style="list-style-type: none"> • Readiness goods - sport clothing and equipment • Performance goods - Fitness, medicine, sport facilities
Sport promotion	sports goods provided	<ul style="list-style-type: none"> •Promotion items, events and media

1) Harada Munehiko(1995), ?An Introduction to sport industry theory?, Kyoto Japan, Kolin, p.11

Source : Pitts, B. G., Fielding, L., & Miller, L. K.(1994), Industry segmentation theory and the sport industry: Developing a sport industry segment model, Sport Marketing Quarterly, 3(1)

Kim, Jong et al.(2000) classified the sport industry as sport facilities, sport goods manufacturing, and sport services based on characteristics of commodities and services.(see Table 3).

2.2. The Characteristics of the Sport Industry

Because the sports industry is composed of various industrial sectors, the industry has special characteristics.

Table 2. Classifications of sport based on commodities and services

Classification	Characteristics	Categories
Sport facilities	Construction and managing Sport facilities (Olympics, World Cup, and sport for all	<ul style="list-style-type: none"> •Construction - arena and stadium •Managing - facilities managing, resort, sport facilities lease
Sport goods manufacturing	Manufacturing and sales of sporting goods for athletes and sport interested person	<ul style="list-style-type: none"> •Sporting goods manufacturing - sport equipments, apparel •Distribution - Equipment retail, lease and repair
Sport services	sport agency business - marketing, event planning, player agent	<ul style="list-style-type: none"> •Game - professional game, amateur game, horse racing, cycling race, sport event etc. •Sport marketing - marketing agency, player agent, sport agency and training •Sport information - newspaper, broadcasting, internet, sport ottery, software etc

Source : Kim jong et al(2000), Sport Industry Promotion Master Plan, Ministry of cultural and tourism, Korea

Above all, from the view points of customer's participation and non-transferable of sport products, the location of sport facilities has a very important role.

Second, as a time consuming business, Sport products require the customer to invest his or her leisure time to consume the product. Therefore the importance of location imposes another restriction within the sports industry. The market for products, services and facilities in which to use them must be within a reasonable distance for the customer.

Third, the sports industry involves a service-required business sector. As many people have participated in sports, the portion of service required in the industry has been increasing dramatically.²⁾

Fourth, The consumption of sports products and their usage in the sports industry has the characteristics of marginal consumer's goods and services. Since the sports industry deals in the final products, consumers in the sports industry contact and consume the products directly and finally. In this aspect, products of the sports industry have strong characteristics of selective commodities and participatory goods.

III. Current Status & Perspectives of the Sport Industry

Most nations have understood that sport is an important industry sector for their economies and that the scale of the sports industry is continually growing. The most comprehensive measure of a nation's total output of goods and services used by the economist is the Gross National Product(GNP). The GNP can be calculated in two methods, by examining either expenditures or income. If there is no error in calculation, each method should give the same result. The first approach is to add all expenditures on goods and services produced. Such expenditures include consumption spending of individuals and non-profit organizations; business spending on investment in equipment, inventories, and new construction; government spending on the purchase of goods and services; and net sales of goods and services abroad. The income approach involves the summation of all earnings collected in the production of goods and services and includes wages, interest, and gross profits(Tim Berrett,

2) Ministry of Trade & Industry of Japan announced industry white paper and said 3 core industry in 2025 are welfare industry, environment industry and emotion industry and among them Sport industry is most perspective. In Japan, Sport service sector ? sport education expenditure, sport related public-private expenditure - other than Sport equipment and Sport facility is most impressive. Economic scale of sport market reached 5.2 trillions, and 3.3trillions of them were sport service sector shared 64% of the sport market.

1996).

The Gross National Sport Product(GNSP) and Gross Domestic Sport Product(GDPS) are two of main indexes with which to identify the sports industry as national income.

The Gross National Sport Product(GNSP) is derived in a fashion similar to the GNP.; either by totaling the expenditures? within the economy on sport and expenditures within the economy on sport and leisure goods and services or by summing the total incomes accruing from the production of sport and leisure goods and services.

GNSP is the index for the estimation of the Gross Production of Sport related business which considers the expense for sport equipment, participation or facilities construction, sport equipment, sportswear, broadcasting fees, Admission fees, VTR, publications and so on. A related measure of the national sports output is the Gross Domestic Sport Product(GDSP), which differs slightly from GSNP. The measurement of GDSP ignores income resulting from net foreign investment in the sports related sector. The GSDP is one of the nation's income indexes which presents the tendency of sport related products in the Gross Domestic Product(GDP).³⁾

3.1 Current Status of the Sport Industry in Korea, U.S. and Japan.

3.1.1 The Sports Industry in Korea

The sports industry in Korea has been increasing dramatically since the 1990s. Even though the IMF era(1997-98), the sports related portion of household expenditures has not decreased and this tendency is likely to continue in the 21st Century.

According to Table 3, The Scale of the Sports industry in 2001 shows 11407.2 billion won which means 2.09% of Korea's GDP. The Sport facility business presents 38.86% of the whole sport industry and is the greatest sector of the sports business. This amount could be classified as 985.4 billion won in sport facilities construction and 3447.5 billion won in facility management. Among these golf fees could be estimated as 1718.8 billion won and this figures represents 38.77% of the entire sports industry.

The volume of the sports equipment market is 3651.3 billion won and represents a 32% share of the entire sport industry. Among them, equipment manufacturing takes 1905.1 billion won and distribution sector takes 1746.2 billion won. Sport services total 3322.3 billion won and represents 29.1% of the entire sports industry. This sector could become a value added sector by management techniques. Sport events takes 2628.6 billion won, which represents 79.1% of the sport service

3) Several advanced country established sport related one stop supporting system through analysis of Gross National Sport Product and Gross Domestic Sport Product.

sector and 23.4% of the total sport industry. Sport information part takes 656.6 billion Professional sports among the Sport events won. . And another parts such as marketing took in 333.2 billion won, which represents agent, player agent, training, takes 37.5 10.03% of the whole sport service sector. billion won.

Table 3. Scale of sport industry in Korea

(unit: million won)

Sector		Categories	Total	Grand Total	
Sport equipment	Manufacturing	Equipment	9,026.8	19,051.3	
		Apparel & shoes	8,324.5		
		Sport beverage	1,700		
	Distribution	Whole & retail	16,584	17,462	
		Cyber business	878		
Total				36,513.3	
Sport facilities	Construction	Private facilities	1,333.7	9,854.3	
		Public facilities	8,520.6		
	Facilities management	Fee and tuition	17,289	34,477	
		Golf fee	17,188		
	Total				44,331.3
Sport services	sport	Cycling race	5,216.7	5,216.7	
		Horse Race	16,882.3	16,882.3	
		Amateur sport	734.8	734.8	
	Game event	Team Sport	Team Sport	2,955.3	
			Pro-sport	Personal sport	
		Pro-sport	oversea trade	297.9	
		sport event		120	
	Sport marketing	Sport marketing agency		225	375
		Sport agent		75	

		Athlete training	75	
	Sport Information	Newspaper & publication	3,313	6,566.4
		Broadcasting	219.2	
		sport tour	1,172.4	
		Sport lottery	300	
		Membership sales agent	72	
		sport medicine	595	
		sport game(internet)	512.2	
		sport information & ARS	382.6	
			Total	
		Grand Total		11,4,072.7

Source: Ministry of cultural and tourism(2001), Korea

3.1.2 The Sports Industry in the USA

Wharton Econometric Forecasting Associates(WEFA) which developed the GNSP concept pointed out that the sport industry in USA based on 1987 scale estimated \$502 million represents the 11th largest industry and is categorized as a very dramatically developing industry sector in the U.S..⁴⁾

The GDSP of 1995 in the U.S. took in \$1,519 million and this figure is twice as much as figures in 1990, which means the sports industry gets twice as large every 5 years.

4) Sandomir, R. (1988): The 50-billion sport industry, Sport Inc., November 14, pp.14-23

Table 4. Scale of Industry in U.S.

(unit: million\$)

Ranking	Sector	scale	Ranking	Sector	scale
1	Real estate	8,500	11	Sport	1,520
2	Retail	6,399	12	Chemistry	1,410
3	Whole sale	4,810	13	electronics	1,385
4	fitness services	4,434	14	Industrial machinery and equipment	1,355
5	Construction	2,776	15	Insurance Carriers	1,154
6	Business services	2,776	16	Food and kindred products	1,133
7	Depository Institutions	2,239	17	Transportation & cargo	1,006
8	Utilities	2,053	18	Legal services	1,005
9	Services	1,949	19	Printing& publishing	897
10	Communication	1,557	20	Automobile	887

Source: A. Meek(1997), Industry Analysis, Sport Marketing Quarterly, 6(4)

A. Meek(1997) argued that the Gross Domestic Sport Product(GDSP) of the GDP in the U.S. became the 11th largest Industry in 1995 business in the United States and is larger than the chemistry(\$1,410 million),and electronics(\$1,385 million) industry.⁵⁾(see Table 5)

The GDSP/per person is \$578, and creates \$2.32 million in employment and creates a household income of \$521 billion. In

addition, If considering the indirect effects of sport(\$25.89 billion), the scale of the sport industry becomes a \$400 billion industry, which shares 5.5% of the GDP. This scale is the almost the same as the scale of the Fitness business.

5) Alfile Meek(1997) estimated "Influences of sport industry on national economic" The research argued that supported economic activities of sport industry reaches \$ 2.59 billion and influence of the figure on household incomes reaches \$750 and effectiveness of employment reaches 2.33 millions.

Table 5. Scale of the Sport Industry in the United States(GDSP)

(Unit: million\$)

Category		Scale	Ratio
Sport Consumption	Entertainment and recreation	44,173	29
	Products & services	93,153	61
	Advertising	7,522	5
	Total	144,848	95
Sport investment		11,816	8
Sport export		-4,700	-3
Grand Total		151,964	100

Source: A.Meek(1997), An estimate of the Scale and Supported Economic Activity of the Sport Industry in the United States, Sport Marketing Quarterly, 6(4), pp.15-21.

Sport consumption is composed of Entertainment & recreation(\$4.4173billion), Participation in Leisure Sport(\$3.2 billion), Admission to spectator sport(\$5300million)and Pari-mutuel net receipts(\$3300million). And Concession, souvenirs, etc (\$3,400million), Others (\$173million) are also involved.

Sport products and services are composed of equipment, Apparel, Footwear(\$7.1billiom), sport medicine(\$1.85 billion) and sports merchandise such as Trading Cards, Videos, books, etc(\$3500million), Others(\$153million) are also involved(See table 5).

Figure 2 commercial Sport Expenditures in the U.S.

According to the Census Bureau, the Commercial Sport sub-sector of the sport industry grew at an annual rate of 9.9% from 1989–1998, increasing from \$7.6 billion to \$17.7 billion (see Figure 2). Table 6 shows how sport business has developed through the history of Super Bowl.⁶⁾ The Table implies the success of the sport business by a combination of Marketing, Merchandizing, and Money.

3.1.3 Sport industry in Japan

The Preference for consumption of leisure time in Japan has changed from going to movies, traveling, and participating in various kinds of sports, going to resort area. During the recession, the sports consumption pattern has changed from money consumption to time consumption and from a passive pattern to an active pattern. In the 10 years after 1983,

Table 6. Development of Super Bowl

Category	The 1st game(1967)	The 25th game(1996)
TV CM fee(30sec)	38,000\$	1.2 million\$
TV audience	7,540 person	750 million person
NFL revenue	2.5 million\$	50 million\$
average spectators	52,381 person	59,698 person
player's average salary	22,000\$	737,000\$

Source: Leonard II, W.M, A Sociological Perspective of Sport, 5th ed., Allynand Bacon, Boston, 324, 1998.

The Miller Lite study of 1993, and the ongoing ESPN/Chilton Sport poll reveal, among other findings, the tremendous effect sport has on the daily lives of Americans, not only in terms of sport participation, but also in attendance and media consumption of sport. A 1991 public opinion poll from a national sample revealed that 73% of the respondents were either "very interested " or "fairly interested" in watching sport, either in person or on TV(Lieberman, 1991).

especially the last 5 years, was called the Leports period.

It was in 1982 when the sports market clause was first seen in the "Leisure white Paper", which is issued annually by the Leisure Development Center, and at that time the market totalled 2 trillion 950 billion yen. This market reached a peak of 6 trillion 136 billion yen in 1993. This means that the market scale was doubled in 10 years. The Sports market has shown strong growth during prosperity, and is still

6) Leonard II, W.M (1998) A Sociological Perspective of Sport, 5th ed., Allyn and? Bacon, Boston, 324.

maintaining a steady increase in the entire leisure market. Although its ratio fell in as the bubble economy collapsed. Even though it is called sport industry in a word, the figures indicate its market scale largely differs, depending on which industries are included. For example, according to the sports industry fields proposed by the Ministry of Economy, Trade and Industry(METI). It is divided into two big fields of hardware and software. The Software field included goods, information, and sports oriented services, and the hardware field is categorized into two areas of sports manufacturers and sports space suppliers, and also includes large areas such as sports related travel and insurance services. Although it was foreseen during the prosperous period in 1989, METI forecasted that the 4.3trillion yen scale of such a wide field of sports industry at that time would increase fivefold to 22 trillion

yen in 2000.

The same METI forecast of the sports related industry in 1994 had a downward revision due to bubble economy collapse, which now predicts that the sales of 3 trillion 368 billion yen in 1992 will be tripled to 9 trillion 3000 billion yen by 2010. In any case, the Japanese sports industry will steadily grow along with an increase of Japanese leisure inclination, and is expected to become of one the key industries in the 21st century.

According to Table 7, Sport related expenditure shows 57000billion yen in 1997 – almost the same as in 1989 –which is a 1.1% share of GNP. This means that Sport and leisure market have not expanded for the last 10 years. The figure, however, omitted the government expenditure for sport sectors, so the figure is almost the same in scale as Europe and the USA.

Table 7. Scale of Sport market in Japan

(Unit: million yen)

Category	1989	1997
GNP (A)	39,129,900	51,373,900
Private Final expenditure (B)	22,032,400	30,753,400
Leisure expenditure(C)	6,345,400	8,264,900
Sport expenditure(D)	426,500	570,800
D / A	1.1%	1.1%
D / B	1.9%	1.9%

Source: Ministry of commerce(1990), "Sport Vision 21", p.56. Leisure Development Center, "leisure white paper", 1998.

Table 8 shows the transition of booth revenue of "sport Japan" (trade show) hosted by Japan Sport Industries Federation. According to this table, booth revenue on 1997 was 273 million yen, which was one fourth of the 1 billion 60.42 million yen in 1990, and shows the present condition of the Japanese sport industry realistically.

than the cinema industry and two times larger than the automobile industry. The scale of the sport industry in Korea shares less than 1% of the urban's household economy expenditure because of the recession, however, if this figures reaches 2-3%, the Scale of the industry will be expanded dramatically. In addition,

Table 8. Sport Booth Space Fees in Japan

(Unit: million yen)

Year	1989	1990	1991	1992	1993	1994	1995	1996	1997
Fees	511.406	1,060.427	875.254	739.431	638.670	527.797	352.567	249.539	273.085

Source: Japan Sport Industries Federation, 2000

3.2 The Perspectives of the Sport Industry

Most advanced countries consider the sport industry as most the promising business in the 21st Century. The 21st Century Economic Vision Forum in Japan also decided the sport industry showed great promise. As a business, the scale of the sport industry in the United States is \$255,500 million which is seven times larger

Considering the transformed concept of sport value and increase of sport participant desire, the scale of the sport business will be greater than before.

The Sports market has expanded dramatically the 1990s and the increase of sport related household consumption exceeds the rate of economic growth. Sport related consumption has grown even though the recession era.

Table 9. Comparison of rate of economic growth to increase of sport consumption

	1991	1992	1993	1994	1995	1996	1997
Rate of economic growth	9.1%	5.1%	5.8%	8.6%	8.95%	6.8%	5.0%
Increase of sport consumption	26.4%	21.5%	16.3%	14.5%	6.4%	6.65	14.05

Source: Ministry of cultural and tourism, 2000, sport industry plan

The Scale of the sport industry in OECD nations are presumed to be \$29.33 billion and the consumption of sport equipment increased an average of 6% during 1990s.⁷⁾ The United States has the largest sport market – share of 50% of the entire market – and Japan is positioned next – with a 16% share of the of the entire market. Sport is a value added industry which includes sport equipment, facilities, services, new material, tour and culture in the 21st Century. In addition, the production intention and growth of business value also positioned sport as a promising business in the 21st Century.

IV. Conclusion

The Sport Industry is still in the hands of men who have no clue about Business."(Bose, 1996). The Sport industry in the 1970s was focused on manufacturing items such as sport apparel and shoes in Korea. However, the increase of disposable income and the reduced working hours stimulates leisure desire. This will no doubt increase the value of sport and cause increases in the demand for sports equipment, sport services and sport facilities

The Gross scale of the sport industry is estimated at 11,407.2 billion won, which is

composed of sport equipment (3651.3 billions won), sport facilities(4,443.1 billion won), sport services(3,322.3 billion won) in 1999. A. Meek(1997) estimated the total scale of sport industry at \$151,964 million, which is composed of entertainment & recreation(\$44,173million), products and services(\$93,153million) and sport advertising(7,522million) in the United States.

Gross scale of Sport related commodities and services in Japan only for 2000 billion yen in early 1980s however, the figures reached 4300 yen in 1989.

Growth of sport industry and increase of the value in whole industry structure are common in recently. However, To study of market scale and present condition of sport industry are very insufficient in Korea. Also, Because sport industry requires systematic relationship with other industry sector, sport policy have to be established with great attention.

This study is to contribute to find out vision and to grope for supportive a thesis of sport industry in the 21st Century based on analyzed sport industry data of Korea, U.S., and Japan. In addition, scholastic relation, such as management, economics, law and physical education, is very effective to develop sport industry.

7) Street & Smith's Sport Business Journal, 2000

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