

GAME PLAN JAPAN

SPORTS BUSINESS DELEGATION REPORT

21-25 APRIL 2025



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Prepared for
Major Event and
Sport Advisory
Committee

TABLE OF CONTENTS

→	01	EXECUTIVE SUMMARY
---	----	-------------------

→	02	DELEGATION OVERVIEW
---	----	---------------------

→	03	DELEGATES
---	----	-----------

→	04	KEY TAKEAWAYS AND OPPORTUNITIES
---	----	---------------------------------

→	05	KEY LEARNINGS FOR AJBCC
---	----	-------------------------

→	06	OPPORTUNITIES FOR AJBCC
---	----	-------------------------

→	07	NEXT STEPS AND RECOMMENDATIONS
---	----	--------------------------------

→	08	DELIVERY PARTNERS
---	----	-------------------

→	09	CONCLUSION
---	----	------------

EXECUTIVE SUMMARY

The Game Plan Japan: Sports Business Delegation was a collaborative initiative between the Australia Japan Business Co-operation Committee (AJBCC) and the Australian Sports Technologies Network (ASTN). The primary aim of the visit was to foster stronger business ties and collaboration between Australia and Japan within the Sports industry. The delegation took place from Monday 21 April to Friday 25 April 2025 and visited four Japanese cities in the Kanto Area (Tokyo and Kawasaki) and the Kansai Area (Osaka and Kobe).

HIGHLIGHTS

Program highlights included Japanese market, investment, and business development briefings; a panel discussion hosted by the Australian Embassy Tokyo's Sports Diplomacy Section; and networking events co-hosted with the Australian and New Zealand Chamber of Commerce in Japan's (ANZCCJ) Sports for Business Committee, Nakanoshima Qross, and the Australia Pavilion at Expo 2025 Osaka.

The delegation also held multiple meetings with major Japanese corporations and sports ecosystem stakeholders such as Fujitsu, DAZN, Mizuno, Sports Xebio, Dunlop Sports, as well as sports technology innovators, major event rights holders, and sports travel/event providers. Site visits showcasing high performance and sport fashion/retail included Fujitsu Technology Park, a Super Sports Xebio store and the Japan High Performance Sport Center.

This report outlines the delegation's activities, highlights key learnings, and identifies learnings and proposed next steps.

**14 DELIVERY
PARTNERS**



Government, Corporate and NPO Partners

8 DELEGATES



Representing a diverse mix of Australian sport and sportstech products and services

DELEGATION OVERVIEW

KANTO PROGRAM (21 - 23 APRIL 2025)

Day 1: Monday, 21 April 2025

- Japan's legal framework and market brief: The delegation commenced in Tokyo with a comprehensive overview of Japan's legal landscape by Byron Frost, Partner at Baker McKenzie.
- Sports streaming and media landscape: Kevin Abe, Senior VP for Growth Marketing at DAZN, provided insights into the Japanese OTT and sports media scene, covering content delivery, audience engagement, and potential partnership avenues.
- Welcome Lunch hosted by Global Victoria: This event facilitated early networking among delegates and representatives from sponsors Global Victoria and Trade and Investment Queensland.
- Corporate sports: The session with Fujitsu explored the company's contributions to the Japanese sports industry and their approach to Corporate Sports, a unique system providing career pathways for professional athletes. Presentations highlighted Fujitsu's Judging Support System and human motion analysis technology. This was followed by a tour of Fujitsu's Technology Hall and Museum, showcasing their history and commitment to innovation.



Day 2: Tuesday, 22 April 2025

- High performance and training: Delegates visited the Japan High Performance Sport Center – Team Japan's elite athlete training facilities – and heard from Dr Daichi Yamashita of the Japan Institute of Sports Sciences. The visit explored potential collaborations in elite athlete coaching and training.
- Australia-Japan trade and sportstech trends: Leo Bremanis, Trade & Investment Commissioner – Japan, Austrade North-East Asia, provided an overview of key trade and sportstech trends in Japan.
- Networking event at the Australian Embassy Tokyo: A welcome reception co-hosted with the Australian and New Zealand Chamber of Commerce in Japan (ANZCCJ) and the Australian Embassy Tokyo featured a panel discussion on Australia's 'Green and Gold Decade' and Tokyo's hosting of major sports events in 2025. The event facilitated networking with a broad range of stakeholders in the Japanese sports business community.

Day 3: Wednesday, April 23, 2025

- Japan's sports retail market: A meeting with the Xebio Group and a visit to the Super Sports Xebio store, led by Xebio Holdings CFO Kazuhiko Nakamura, offered insights into Japan's sports retail sector, consumer trends, sports culture, and market access strategies. The store visit provided practical understanding of merchandising, store layout, customer service, the role of technology in retail, local competition, and marketing approaches.

DELEGATION OVERVIEW

KANSAI PROGRAM (24 - 25 APRIL 2025)

Day 4: Thursday, April 24, 2025

- Corporate – Startup partnerships: A meeting with Mizuno Corporation and a visit to the Mizuno Engine Innovation Center showcased Mizuno's approach to innovation in sports technology and product development, highlighting potential areas for collaboration in joint product development and sales. Launched in 2022, the innovation center aims to strengthen R&D and accelerate social innovation through sports.
- A Japan-Australia networking event was hosted at Nakanoshima Qross in partnership with Mizuno Corporation and Miracle Science Innovation. Delegates presented to and met with a diverse group of companies, academic institutions, government-related organisations, and entities focused on fostering innovation and international collaboration in sport and health within the Kansai region.
- The Hon Tim Mander MP, Queensland's Minister for Sport and Racing and Minister for the Olympic and Paralympic Games, joined both sessions.

Day 5: Friday, April 25, 2025

- Golf and Tennis markets: A meeting with Dunlop Sports explored potential collaborations in Australian product distribution or technology collaboration within the Golf and Tennis markets.
- Kansai market and business development strategies in Japan: Joshua Flannery, CEO at Innovation Dojo Japan, provided a regional perspective on the Japanese market, focusing on the specific characteristics and opportunities within the Kansai area.
- Sports Business Connections Networking Event at Expo 2025 Osaka: The delegation concluded with a networking event at the Australia Pavilion at Expo 2025 Osaka. This provided insights into Japan's major event delivery and a platform to connect with international and Japanese businesses. The Hon Tim Mander MP spoke about Queensland's vision for the Brisbane 2032 Games and potential Australia-Japan collaboration in sportstech and innovation. Minister Mander also engaged with delegates, listening to their product presentations and networking with guests.



DELEGATES



Anti Ordinary
Robert Joesph



Australin Sports Technologies
Network (ASTN)
Craig Hill



Court Coverage
Paul Kleverlaan



ECAL
Debra Tracey



EngageRM
Dale Equid



GravityFit
Kirsty Richardson



KAP Research, Investment
and Advisory (KAPRIA)
Adam Karg



Superinteractiv
Richard Helmer

KEY TAKEAWAYS AND OPPORTUNITIES

Key insights and findings were shared by the delegates following their participation in the Game Plan Japan Delegation. Several overarching themes emerge regarding the Japanese sports / sportstech market and opportunities for Australian businesses. These are summarised below.

MARKET MATURITY AND DIGITAL ADOPTION

The Japanese market appears immature in its approach to data centralisation and understanding customer bases, presenting a clear opportunity for Australian organisations in this area. While there is a clear intent for Japanese sports organisations to utilise global products and services, the adoption of digital platforms and online tools by professional clubs and venues may be slower due to the significant change management processes required and the need to change consumer behaviours.

SPORTS SCIENCE KNOWLEDGE GAP

There is an apparent disconnect between coaching and sports science know-how at higher levels of sport in Japan. Australia is perceived as more advanced in this area. This gap may present opportunities for continued sports education, knowledge-sharing, and technology transfer.

ECOSYSTEM STRUCTURE

Unlike Australia (with networks like ASTN), there appears to be a lack of a central point for the sportstech industry in Japan. The sportstech and innovation market seems to be dominated by large corporations, with less evident startup activity compared to Australia. Engagement by large corporations with external parties for tech development or co-creation does not seem significant, with innovation often driven internally. However, some Japanese firms are beginning to set up/practice open innovation.

CORPORATE OWNERSHIP OF SPORT

A key difference from Australia is the deeply embedded relationship between Japanese corporations and sport, including corporate ownership of professional teams and employee-based "corporate sport" programs. This structure provides a targeted procurement opportunity for well-established Australian sport businesses.



KEY TAKEAWAYS AND OPPORTUNITIES

VALIDATION AND CREDIBILITY

For Australian sport businesses seeking credibility in Japan, success in other key markets such as the US and Europe, is seen as important. Existing customers in these markets set benchmarks for Japanese entities.

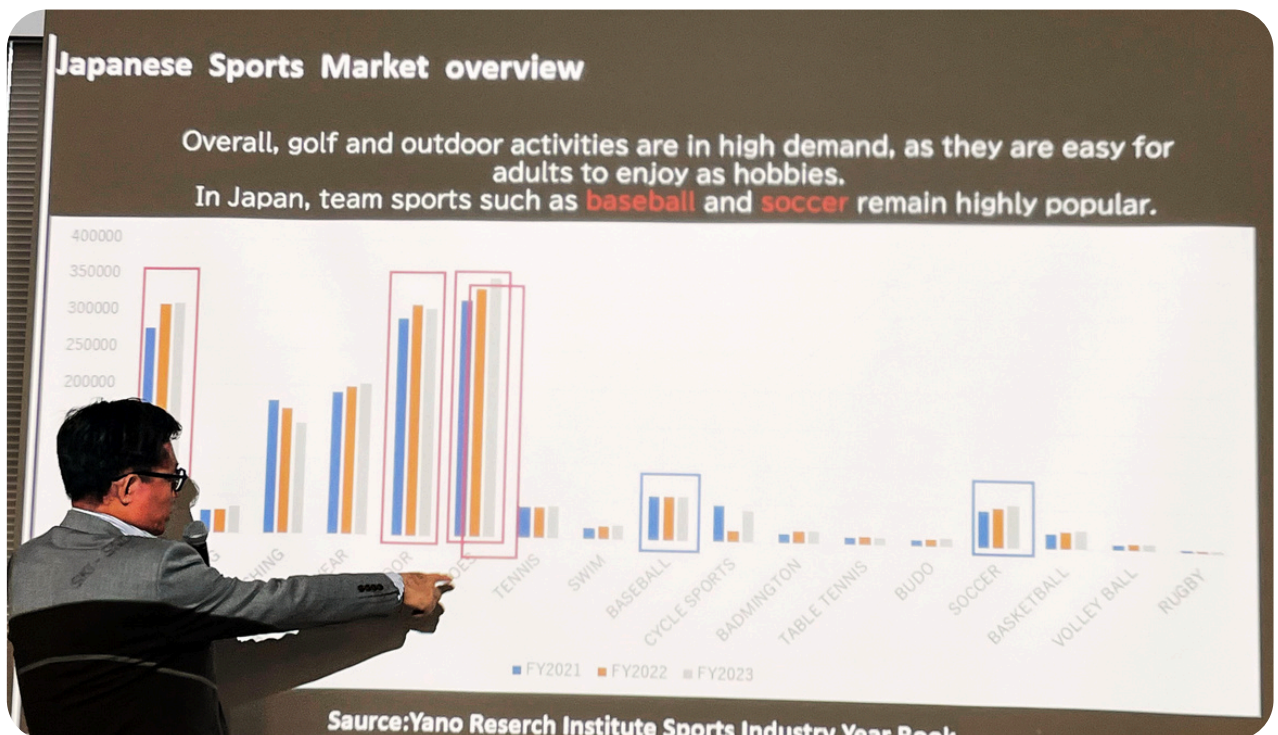
FOCUS ON BRAND, COMMUNITY AND HEALTH

Beyond performance, sport in Japan is closely tied to health and community, valued particularly for junior athlete development and for the aging population.

There is strong interest in innovation and technology, especially where it supports brand equity, community impact, and operational efficiency. Community, wellbeing, and innovation were frequently mentioned themes when meeting with Japanese corporates, but many organisations lack frameworks to measure the impact of their work in these areas. A gap appears to exist between innovation development (within corporate R&D) and its practical deployment in the sport industry.

LOCALISATION IS CRUCIAL

Success in the Japanese market likely requires key local personnel, particularly for account management and support staff. Language barriers are a significant challenge, and politeness can make it difficult to gauge true understanding of the products and services being offered.



KEY LEARNINGS FOR AJBCC AND ITS PARTNERS

The delegation clearly benefited from the combined networks of AJBCC, ASTN and the Victorian and Queensland State Governments. This highlighted the power of collaborative initiatives in providing broader access and credibility for the initiative. This model should be considered for future delegations.

Addressing cultural and language barriers is paramount:

The AJBCC played a critical role in facilitating meaningful connections and fostering trust between Australian and Japanese stakeholders. Future initiatives should continue to prioritise this aspect.

The sports science opportunity is significant:

The identified gap in sports / performance science education and practice in Japan presents a clear area where AJBCC Members (existing and potential) with this expertise could lead. AJBCC can play a role in facilitating knowledge exchange and potential partnerships in this domain.

Measurement and impact are emerging needs:

The recurring theme of Japanese organisations seeking better ways to measure the impact of their sports and community initiatives highlights a specific area where Australian expertise, potentially involving university collaborations, can be valuable.

The time and cost of market entry remain a challenge:

The feedback from delegates reinforces that navigating the Japanese market is complex. AJBCC's role in providing guidance, connections, and potentially streamlined pathways is crucial for Australian businesses wishing to penetrate the Japanese market.



OPPORTUNITIES FOR AJBCC AND ITS PARTNERS

- **Facilitate sports science knowledge exchange:**

Organise workshops, seminars, and introductions focused on Australian sports science expertise for the Japanese market, potentially involving Australian universities and research institutions (current and potential AJBCC members).

- **Promote measurement and evaluation frameworks:**

Showcase Australian capabilities in measuring the impact of sports, community programs, and sponsorships to Japanese organisations seeking solutions in this area. This could involve webinars, case studies, and an inbound Japanese delegation.

- **Develop "Market Entry Navigation" programs:**

Continue to support the creation of specialised programs or resources to guide Australian businesses through the complexities of the Japanese market, including cultural nuances, business practices, and regulatory considerations.

- **Supporting the development of an Australia-Japan SportsTech Hub:**

Offer its experience and insights to emerging initiatives in Japan aimed at creating a central hub for the sports tech industry, potentially collaborating with ASTN and Japanese counterparts.

- **Explore sector-specific delegations:**

Future business delegations could take the learnings from this delegation and focus on specific niches within a sector of interest to cater to more targeted interests and facilitate deeper connections.

- **Foster university-industry linkages:**

Promote collaborations between Australian universities with sports-related expertise and Japanese corporations or sports organisations seeking innovation and research partnerships.



NEXT STEPS AND RECOMMENDATIONS

Based on the insights gained, the following next steps are suggested for Australian sport/sportstech businesses and facilitating bodies such as AJBCC, ASTN and State Governments.

LEVERAGE EXISTING RELATIONSHIPS AND FRAMEWORKS

Utilise and leverage established bilateral relationships and anchor points like the AJBCC-JABCC, ASTN, Australia Japan Foundation, State Government programs, and JETRO to establish clearer market entry pathways for Australian sport and sportstech businesses.

ADDRESS SPORTS SCIENCE GAP

Explore opportunities to provide continued sports education, knowledge-sharing, and technology in sports science, capitalising on Australia's perceived advantage in this area. This could include tertiary education (Edu-Tourism) or secondary entrepreneurial education.

BRIDGE THE DEPLOYMENT GAP

Seek partnerships, testbeds, or pilot projects to help bridge the gap between innovation development within Japanese corporations and its practical implementation in live sport and events.

FOSTER UNIVERSITY-INDUSTRY LINKS AND OFFER MEASUREMENT EXPERTISE

Develop initiatives for collaboration between Australian and Japanese universities and industry, particularly focused on measurement and tech deployment, building on the strong university presence in sport management and science in Australia.

Position Australian organisations and universities to provide frameworks for evaluating the impact of community sport, athlete marketing, and innovation programs, where Japanese organisations currently appear to lack capability.

NEXT STEPS AND RECOMMENDATIONS

DEVELOP RELATIONSHIPS AND PLAN FOR LOCALISATION

Follow up on the initial relationships established during the delegation, particularly the interest shown by companies like Xebio, Mizuno, and Dunlop Sport.

Factor in the need for local personnel and consider strategies for addressing language and cultural nuances for successful, long-term market penetration. Obtaining language and in-market support may be crucial for this development.

CONSIDER LANDING PAD INITIATIVES

Investigate the potential for Australian regions (like Victoria or Queensland) to offer landing pad opportunities for young Japanese individuals interested in overseas experiences, linking this to sports business / tech activity areas.



DELIVERY PARTNERS



**TRADE +
INVESTMENT**
QUEENSLAND



Australian Embassy



**Baker
McKenzie.**



Nakanoshima **Qross**

FUJITSU



JAPAN SPORT
COUNCIL



CONCLUSION

The AJBCC-ASTN Sports Business Delegation to Japan provided a valuable platform for Australian sports businesses to explore opportunities, build relationships, and gain insights into the Japanese sports and technology market. The program, encompassing market briefings, stakeholder meetings, site visits, and networking events across key regions of Japan, offered a comprehensive overview of the industry and facilitated direct engagement with potential partners. The potential outcomes of this delegation include the establishment of new business ventures, the fostering of technological collaborations, and a deeper understanding of the dynamics of the Japanese sports sector, ultimately contributing to stronger Australia-Japan business ties in this industry. Continued follow-up and engagement by the participating delegates will be crucial in capitalising on the connections and knowledge gained during this delegation.

