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## **The Evolution of China's Sports Industry Policies, Stage Characteristics and Development Trends**

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### **Abstract**

The formulation of industrial policies has been closely intertwined with the development trajectory of the sports industry. A systematic examination of policy evolution can enhance our comprehension of the industry's developmental processes and facilitate predictions regarding future trajectories. This study conducts a longitudinal analysis of 186 policy documents promulgated between 1978 and 2022, utilizing social network analysis, thematic keyword analysis and semantic network analysis. Our periodization framework identifies four distinct evolutionary phases: germination period(1978-1991), initial formation period(1992-2000), stable development period(2001-2013), and strategic cceleration period(2014-2022), with the general characteristics of gradually increasing the number of policies, expanding the scope of policy subjects and enhancing the effectiveness of policies. The analysis reveals three cardinal evolutionary patterns: (1) Governance transition from unilateral departmental

oversight to cross-ministerial collaborative networks; (2) Paradigm shift from restrictive administration to developmental incentivization; (3) Discursive transformation from conceptual ambiguity to operational precision. The four stages demonstrate distinct policy priorities characterized by operational pluralism in foundational development, regulatory frameworks for market formation, service-oriented governance mechanisms, and whole-industry-chain optimization strategies. These findings illuminate China's unique pathway in cultivating sports industrialization through iterative policy experimentation, offering theoretical insights into transitional economies' industrial policy formulation and practical implications for global sports governance models.

**Keywords:** sports industry policy; policy text; evolutionary lineage; policy characteristics; development trend.

## 1 Introduction

The symbiotic relationship between industrial policy evolution and sectoral development has become a critical lens for understanding China's economic transformation. Since the inception of reform and opening-up in 1978, China's sports industry policies framework has undergone a profound metamorphosis characterized by expanding regulatory scope, diversifying governance actors, and intensifying socioeconomic impacts<sup>[1-3]</sup>. This dynamic policy landscape has catalyzed growing scholarly engagement, yet significant gaps persist in systematic longitudinal analyses of its evolutionary trajectory.

Existing scholarship predominantly adopts the analysis method from two perspectives. Cross-sectional analyses examine policy frameworks across developmental contexts, contrasting China's emerging model with established Western paradigms<sup>[4-5]</sup>. Longitudinal investigations predominantly focus on discrete policy instruments, particularly fiscal mechanisms<sup>[6-7]</sup> and regulatory architectures<sup>[8]</sup>, often constrained by narrow temporal scopes. While these contributions illuminate specific policy dimensions, they collectively suffer from three limitations: (1) overreliance on qualitative case studies vulnerable to interpretive subjectivity, (2) fragmented temporal coverage inhibiting holistic pattern recognition, and (3) insufficient integration of computational textual analysis techniques.

Our study addresses these gaps. First, we construct a comprehensive policy corpus spanning 44 years (1978–2022), systematically capturing China's sports industrialization trajectory from embryonic marketization to strategic pillar industry status. Second, we employ mixed methods combining social network analysis, semantic mapping, and lexical

quantification—an approach particularly suited to decode China's unique policy formulation processes characterized by experimental governance. Third, we situate findings within broader theoretical debates about state-market relations in transitional economies, challenging conventional Western-centric policy diffusion models<sup>[9-11]</sup>.

The ensuing analysis reveals three transformative shifts redefining China's sports governance: (1) from compartmentalized bureaucratic oversight to networked cross-ministerial coordination; (2) from restrictive market containment to incentivized industrial cultivation; and (3) from ambiguous conceptualization to operational precision in policy implementation. These findings refine our understanding of China's distinctive policy experimentation model and offer comparative insights for emerging economies navigating industrial modernization.

## **2 Methods of analysis and data sources**

### **2.1 Methods of analysis**

#### **(1) Social network analysis**

The social network analysis method visualizes interdepartmental collaboration networks using the time series as a clue. Because government organisations have undergone reforms and some departments have been consolidated or renamed, the policy texts will be merged according to the transformation of the functions of the old and new departments, and the names of the existing departments will be used. The relationship matrix is constructed according to whether the departments are jointly issued, with a value of 1 for a joint department and zero otherwise. Using Gephi 0.10.1 software, the sectoral cooperation network is mapped from 1978 to 2022.

Each dot represents a different functional department, and the size of the dot reflects the closeness of the link between the department and other departments. The connecting line indicates the number of joint communications between departments, and the thickness of the line represents the frequency of cooperation cooperation.

#### **(2) thematic policy keyword analysis**

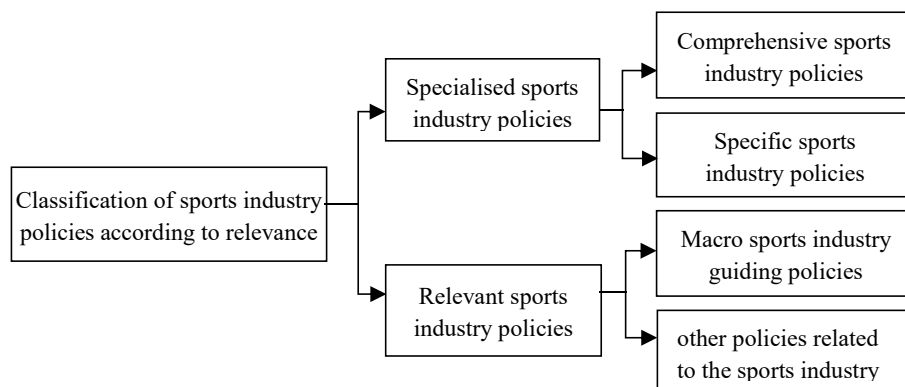
The evolution of policy subject words can map the shift in policy focus and change in intention. These words are not static; they combine to form the core of the literature. Policy lemmas may be added, disappear or reorganised at different times, reflecting the dynamic adjustments of policy issues and policymakers<sup>[12]</sup>. This study mainly uses ROST-CM6 for analysis the policy subject headings.

### (3) Semantic network analysis

Semantic network analysis regards keywords as network nodes, and the semantic relationship between them constitutes the connection<sup>[13]</sup>. This analysis method forms a visualised topic word network diagram from the statistically obtained keywords to show the focus, intention and development trend of policies in different periods.

## 2.2 Data sources

According to their relevance to industrial development, sports industry policies can be divided into two categories: specialised and relevant sports industry policies. Specialised sports industry policies aim to promote the development of the sports industry directly, including comprehensive policies and specific policies. Comprehensive policies encourage the development of the overall sports industry. In contrast, specific policies focus on developing specific areas, such as sports consumption, sports base construction, sports event management, etc. On the other hand, relevant sports industry policies do not take the development of the sports industry as the primary goal but involve the sports industry in terms of content. They can be subdivided into macro-guidance policies and other policies related to the sports industry, such as macro-sports policies, service industry policies, etc ( Fig. 1).



**Fig. 1. Logic of categorisation of sports industry policies according to relevance**

Sports industry policy text refers to the general name of all kinds of regulations and documents issued in formal written form by the main body of policy-making to safeguard and promote the development of the sports industry and sports market. The research object of this paper is the screened sports industry policy text database, which includes comprehensive policies, specific policies, and macro-guiding policies. In contrast, other policies related to the sports industry are not included in the policy text database for the time being due to their relatively complex composition and different degrees of relevance to the sports industry.

Therefore, the screened sports industry policies are all powerfully relevant to the sports industry. The period is from 1978, when China's sports industry sprouted, to 31 December 2022, aiming to conduct a comprehensive and ephemeral study of China's sports industry policies texts to provide a more in-depth understanding and a more specific historical perspective for the long-term development of sports industry policies.

The initial screening of the policy text was carried out using a keyword search. Firstly, the initial full-text search used the most directly related words, such as "sports industry," "sports," and "industry.". Secondly, taking the content of the sports industry as the starting point, the keywords "sports consumption," "sports competition performance," "sports fitness and leisure," "sports events" and "sports tourism" are searched. "sports tourism," "event activities," "equipment," "sports clubs," "ice and snow sports," "mountain outdoor sports," "water sports" and other keywords for secondary search. The search platforms were mainly public websites such as the Chinese government website, the database of national laws and regulations, and the official website of the State General Administration of Sports.

After completing the aforementioned search work, the policies were screened again based on their relevance, directionality and effectiveness: firstly, priority was given to the policy texts of the Central Committee of the Communist Party of China (CPC), the State Council and its subordinate agencies at the central level, and given the differences in the needs and foundations of the development of the sports industry in different regions, the local policies on the sports industry were not included in the policy text database. Secondly, policy documents related to the development of the sports industry are selected, and the keywords need to involve the sports industry, fitness and leisure industry, and sports events. Fuzzy-pointing policy documents and working points are not included in the screening scope. It should be noted that with the change of situation and the development of sports, the existing sports industry regulations may have lost their adaptability and been replaced by new regulations, the applicable period has expired, or the object of adjustment no longer exists. However, this paper focuses on the change in sports industry policies and the lapsed and revised sports industry policies that were effective at the time when the policies were introduced. Therefore, the lapsed and revised sports industry policy documents are counted in the sample of the current year. After screening, a total of 186 sports industry policy samples were obtained.

### 3 Overall characteristics of China's sports industry policies

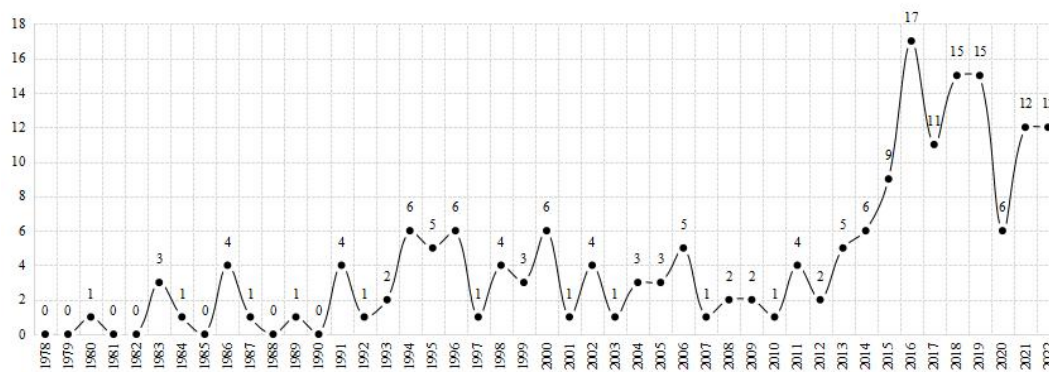
#### 3.1 Large number and wide distribution of sports industry policies

Since 1978, the average annual number of sports industry policy texts enacted is about 4, and it shows an oscillating growth trend (Table 1 and Fig. 1). 1980, 1991, 2000, 2014, 2016, and other years are several turning points in the development of the sports industry. 1980 enacted one policy related to the sports industry, realising the transformation of the sports industry policy from none to some; in 1991, the state enacted four policies, and since then, there have been sports industry policies every year, ending the situation that the number of policies was 0 in some previous years. The sports industry has started to develop. In 1991, the state promulgated four policies. Since then, there have been sports industry policies every year, ending the situation where the number of policies was 0 in some previous years, and sports set off an industrialisation boom; after 2000, due to the shift of the strategic focus of sports to the preparation of the Beijing Olympic Games, the number of policies on China's sports industry began to decline; until 2014, the State Council's Opinions on Accelerating the Development of the Sports Industry and Promoting Sports Consumption(Guo Fa [2014] No. 46) was introduced, the development of the sports industry ushered in an important turning point, and the number of sports industry policies began to increase year by year and reached a historical high of 17 in 2016.

**Table 1. Number of Policy Texts on China's Sports Industry**

Unit: Year, Item

Year	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
Number	0	0	1	0	0	3	1	0	4	1	0	1	0	4	1
Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Number	2	6	5	6	1	4	3	6	1	4	1	3	3	5	1
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Number	2	2	1	4	2	5	6	9	17	11	15	16	6	12	12



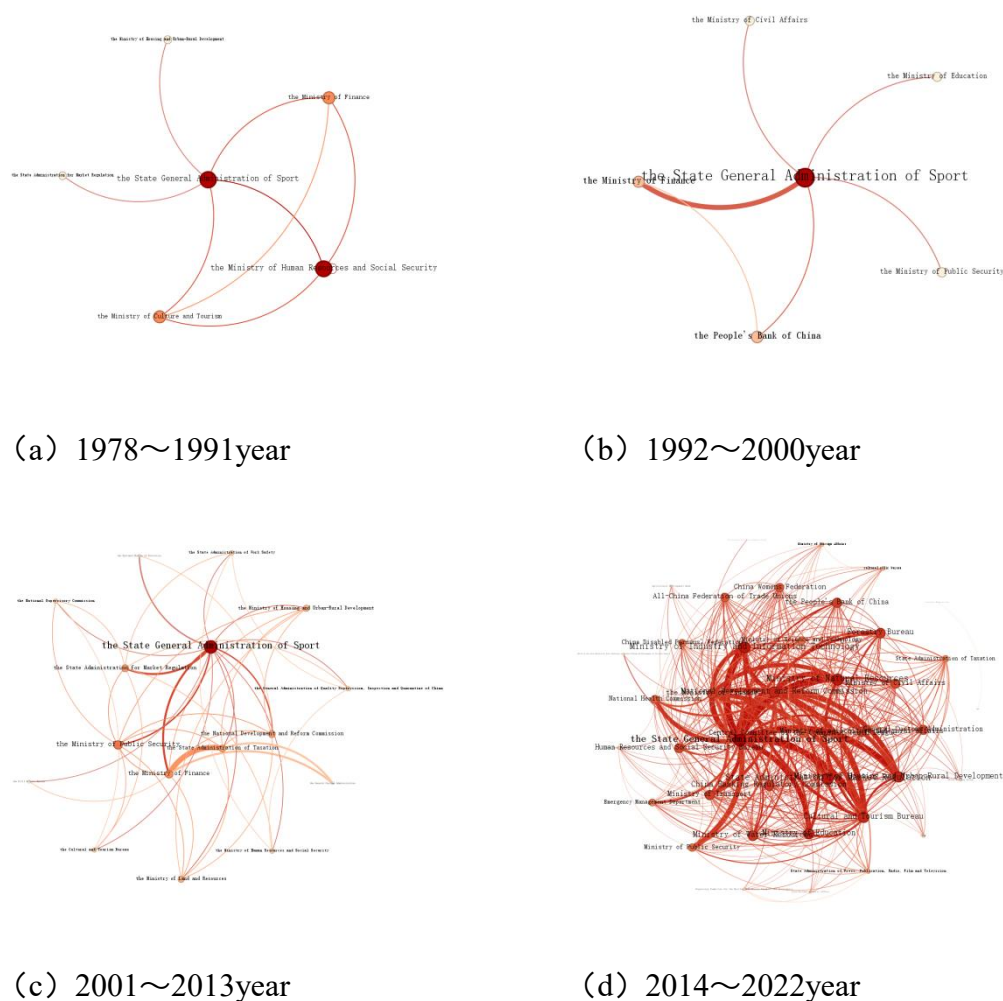
**Fig. 1. Annual policy document output trend of China's sports industry policies Texts (1978~2022)**

### 3.2 Increase in the number of policy-making bodies in the sports industry

From the perspective of policy subjects, the number of policy subjects in China's sports industry has gradually increased, and the cooperation between policy subjects has also been strengthened. In the early days, policy texts were mainly issued by the State General Administration of Sports and other organisations. However, with the continuous development of the sports industry, there has been a gradual trend of diversification of policy-making bodies. According to the analysis of policy texts, there are seven independent policy subjects involved in the sample, namely the National People's Congress, the Central Committee of the Communist Party of China (CPC), the State Council, the General Office of the State Council, the State General Administration of Sport, the National Bureau of Statistics, and the State Administration of Press, Publication, Radio, Film and Television. Among them, the State General Administration of Sports issued the most significant number of separate documents, amounting to 63. The main body of joint issuance involves 47 departments, such as the Ministry of Finance, Ministry of Education, Ministry of Public Security, State Administration of Taxation, General Administration of Customs, and Civil Affairs Bureau, and the number of joint issuance policies reaches 100. Based on the timeline, inter-departmental joint issuance began to increase after 2000, especially after 2013, when the number of joint issuance subjects increased significantly.

As can be seen in Fig. 2, after 2014, the number of departments involved in policy formulation increased dramatically, achieving a "qualitative" breakthrough, with the number of participating departments multiplying, forming a network of departments centred on the General Administration of Sport, the Ministry of Industry and Information Technology (MIIT), the General Administration of Market Regulation (GAMR), the National Development and

Reform Commission (NDRC) and the Ministry of Natural Resources (MNR), which played an important linking role in the sports industry policy in this phase of the development of the sports industry in China. They play an important linking role in China's sports industry policies at this stage, which also means that the importance attached to the sports industry by various departments has reached an unprecedented high level. At the same time, the difficulty of departmental collaboration has increased, and the policy requires higher requirements for the coordination of resource allocation and the efficiency of governmental governance.



**Fig. 2. Cooperation network of China's sports industry policies sectors from 1978 to 2022**

### 3.3 Gradual increase in the effectiveness of sports industry policies

Policies in the sports industry have undergone remarkable changes in terms of form and effectiveness. In the early days, policies were mainly in the form of notices, methods and guiding opinions, which were ineffective and not binding. With time, especially from 2014 onwards, the policy direction has gradually shifted, and more strategic planning documents



have emerged. This shift has given the policy a more substantial leading role, emphasising incentive development. In recent years, the form of sports industry policies has been characterised by greater diversity. In addition to departmental regulations, the number of normative documents has increased significantly, and guiding measures have become more detailed. Although there are fewer laws and administrative regulations in the sports industry policies, which are mainly based on planning and guidance, these policies also show substantial guiding roles and more decisive influence. This development trend shows that although there are differences in the form and level of policies, the gradual increase in the effectiveness of policies has become one of the important driving forces for the development of China's sports industry.

#### **4 Thematic characteristics of China's sports industry policies**

Policies seldom remain in the form in which they were initially adopted but evolve continuously. Particularly in China's sports industry, the adjustment, innovation, and termination of policies are not instantaneous. However, they show a staged evolutionary character with the changes in industrial development and macro-policy context in different periods. Therefore, we must explore the policies in phases.

##### **4.1 Germination period (1978~1991): sports-based and multiple operations**

The period from 1978 to 1991 was the germination period of China's sports industry policies. At that time, due to the uncertainty of the policy environment, the policy framework and system of the sports industry had not yet been formed. Relevant expressions were mentioned in the policies related to the development of sports undertakings. After the Third Plenary Session of the Eleventh Central Committee, there was a gradual change in China's thinking on sports management. The State Sports Commission became increasingly aware of the burdens and problems brought about by the development mode of relying entirely on financial inputs. In the case of insufficient funds for the development of sports undertakings, it began to pursue the extension of sports in the field of the market economy. The reform of the sports system was put on the agenda, with explorations centred on the resources of stadiums and sports teams owned by the government and subjected to financial pressures. As a result, the "facilities," "stadiums," "sponsorship," "advertising," "match," and "enterprise" became high-frequency policy terms during this period (Table 3).

**Table 3. High-frequency theme words (top 20) during germination period (1978-1991)**

keywords	word frequency	keywords	word frequency	keywords	word frequency	keywords	word frequency
sport	363	aviation	76	land use	55	project	38
organize	33	units	98	department	71	sponsorship	51
facilities	37	association	32	advertising	84	regulations	70
match	45	undertaking	36	stadium	30	stat	83
manage	68	develop	41	fund	34	society	23

During this period, China's sports industry has not established its leading status, and there are more management vacuums. There are relatively few subjects involved in the sports industry. In contrast, the entry thresholds and product standards for the sports industry are unclear, leading to ambiguity in market regulation. Therefore, the government mainly restricts and controls the activities of economic subjects through administrative means such as formulating regulations and management methods. During this period, the concepts of "sports economy," "sports tourism," "sports advertising" and "sports sponsorship" gradually became familiar and recognised. Gradually, it became known and recognised by people, laying the foundation for the subsequent benign development of China's sports industry.

#### **4.2.2 Initial formation period (1992-2000): administrative management and industry support**

In the initial formation period, the sports industry's shape was first revealed, and strengthening management and development were the main policy issues. In 1992, China started the reform process of the socialist market economy system, and the plan-led sports undertakings took this as an opportunity to intensify the reform. In 1993, the State Sports Commission issued its Opinions on Deepening Sports Reform<sup>[14]</sup>. In 1994, the former State Sports Commission implemented the professional sports club system, taking football as a forerunner. In 1995, China's sports industry ushered in a new development. The Outline for the Development of Sports Industry proposed the reform idea of "facing the market, going to the market, and taking industrialisation as the direction". It made the first official division of the sports industry<sup>[15]</sup>. The Outline for the Reform and Development of Sports from 2001 to 2010, issued in 2000, clearly pointed out that the sports industry was an important part of China's tertiary industry. In 2000, the Programme for Sports Reform and Development 2001-2010 pointed out that the sports industry was an important part of China's tertiary industry. At this stage, China's sports industry experienced a preliminary exploration from marketisation and industrialisation to a system in which the manufacture of sporting goods, sports competitions and performances, and sports, fitness and leisure competed for development, and

the pattern of a relatively diversified industrial system was initially formed.

In terms of subject terms, the focus of China's sports industry policies during this period shifted towards strengthening management and development. At this stage, not only traditional high-frequency words such as "manage" and "regulations" still occupy an important position, but also emerging words such as "ratify" and "ratify" frequently appear, highlighting the rigour and compliance of the policy implementation process. Meanwhile, to promote the industry's healthy development, supportive verbs such as "develop" and "strengthen" have become high-frequency words (Table 4), reflecting the policy's concern for the balance between industry regulation and industrial development. This change shows the urgent need for the government to gradually emphasise comprehensive development and effective governance during the initial period. Regarding policy implementation, the role of government departments in the initial formation period is more prominent. At the same time, the focus of sports industry policies has gradually become more specific and diversified. A series of keywords related to industry segments have appeared in the policies, such as "fund," "competition," "lottery," "club," and so on. The emergence of these terms reflects the downward extension of policy concerns, focusing on different areas and levels of the sports industry.

On the whole, the central position of China's sports industry was formally established in this period, with the primary objective of adapting to the gradual establishment of the socialist market economic system, and the policy on the sports industry became an independent form of policy. The supply quantity was significantly improved, with the number of various policy documents on the sports industry reaching 34. The policy system initially took shape with comprehensive and specific policy documents involving different contents and fields. There are comprehensive and specific policy documents covering different contents and fields. The sports market is taking shape, and related industries are growing rapidly. However, at this stage, the development of China's sports industry lacks sectoral coordination, and there is a single policy tool, with selective policies occupying a significant position.

**Table 4. High-frequency theme words (top 20) in the initial formation period (1992-2000)**

keywords	word frequency	keywords	word frequency	keywords	word frequency	keywords	word frequency
sport	1261	regulations	200	competition	161	lottery	115
strengthen	95	manage	403	department	181	undertaking	139
society	114	outlay	100	units	273	operate	171
Administrative	136	market	114	ratify	80	develop	224
department							
fund	163	organize	135	club	111	opprove	77

#### **4.2.3 Stable development period (2001-2013): service-oriented management and enhanced incentives**

During this period, the focus of China's sports development was on the successful hosting of the Beijing Olympics; on 22 July 2002, the CPC Central Committee and the State Council issued the Opinions on Further Strengthening and Improving the Work of Sports in the New Era (Document No. 8 of the Central Committee). In July 2006, the Eleventh Five-Year Plan for Sports was officially released. In September of the same year, the State General Administration of Sports (SGS) issued the Notice on the Trial Contract Management of Commercial Activities of National Team Athletes. 2008, the National Bureau of Statistics (NBS) and the SGS jointly issued the Classification of Sports and Related Industries (Trial). In 2010, the General Office of the State Council (GOH of the State Council) issued the Guiding Opinions on Accelerating the Development of the Sports Industry, the first time a policy document was issued to guide the sports industry on a national level precisely. In 2013, the State General Administration of Sports issued the Measures for the Administration of Licences for Operating Highly Dangerous Sports. Driven by the effect of events and public demand, sports enterprises have gradually become active, and various types of sports and fitness clubs have continued to emerge, showing a rapid rise in the diversified sports industry.

Among the keywords of the sports industry policy in the stable development period, words with promotional characters such as "develop," "strengthen," "build," "improve," and other words of a promotional nature take up a higher proportion. The incentives for the industry have been strengthened based on the support in the previous period (Table 5). At the same time, the word "service" jumps to the top of the list of high-frequency words for the first time, indicating that China's sports industry has shifted from the administrative management of the previous stage to service management. Overall, the national competitive sports system has been further improved in this stage, but sports reform has slowed. The formulation and supply of sports industry policies lag behind the development needs of the sports industry, with the rapid development of the sports manufacturing industry, sports service industry, sports lottery industry and other related industries. However, the number of various types of sports industry policy documents is the same as that of the previous stage, at 34, which is the same as that of the previous stage. The policy supply for some rapidly developing fields such as professional league, fitness and leisure industry is almost zero. Most of the research and formulation of policies are mainly confined to the sports system. However, there has been a peak in the research of sports industry policies, and significant progress has been made in the

work of industry statistics and industry standardisation, etc. Although mandatory policy tools such as approvals, management and norms are still in use, more mixed-type policy tools have emerged. Although mandatory policy tools such as approval, management and regulation are still in use, more hybrid policy tools have appeared. The sports industry has gradually become a new growth point of the national economy, and the sports industry policy is in a period of steady development.

**Table 5. High-frequency theme words (top 20) during stable development period (2001-2013)**

keywords	word frequency	keywords	word frequency	keywords	word frequency	keywords	word frequency
sport	3015	certify	362	project	283	fitness	218
improve	187	develop	675	talent	343	society	280
organize	205	department	182	manage	458	strengthen	334
stat	264	market	198	level	176	service	429
build	311	upgrade	227	undertaking	195	institution	163

#### **4.2.4 Strategic acceleration period (2014-2022): construction of the whole industry chain and high-quality development**

The sports industry's policy area has received unprecedented attention in the accelerated promotion stage. Especially in 2014, the state issued the Opinions on Promoting Sports Consumption and Accelerating the Development of Sports Industry, elevating national fitness to the level of national strategy. Subsequently, the entire sports industry market experienced explosive growth. This period is considered an important stage in the historic breakthrough of China's sports industry. By the end of 2022, 104 policy documents on various sports industries had been released, an increase of 70 from the previous period. The sports industry was undergoing a comprehensive deepening of reform, with the cancellation of the right to approve sports events and the rapid development of sports events across the country. In addition, in 2016, the country issued a series of development plans for subsectors of the sports industry and several sports programmes, with an unprecedented frequency of policies. The statistical system of the sports industry has also undergone two revisions in 2015 and 2019, and the work of the industry has been continuously standardised. In 2019, documents such as the Outline for the Construction of a Strong Sporting Nation explicitly put forward the need to promote the development of the sports industry in the direction of high quality and grow it into a pillar industry of the national economy. China's sports industry has officially entered a period of significant development, from planning the development map to guiding the development quality. The policy system of the sports industry in this period has been comprehensively improved, and the sports industry has shown a blowout development trend.

In terms of high-frequency keywords, "sport," "physical education," and "develop" remain the top three keywords after entering the strategic acceleration period (Table 6). "tourism," "facilities", and "consumption" also show high-frequency trends. Policies on the sports industry are comprehensive and rich in content. The degree of extension has been continuously strengthened, with targeted measures introduced in many areas not previously covered. At the same time, great emphasis has been placed on the industrialised development of sports, with unprecedented strength, aiming to create more and better quality sports products and services to promote the comprehensive development of the entire industrial chain. This also reflects the great importance the State attaches to various sports programmes and demonstrates its determination to closely link the production and consumption of sports products and build a blueprint for the development of a healthy and comprehensive industrial chain. Meanwhile, "service," "society," "strengthen," and "encourage," reflect the continuation of the State's thinking on the previous stage of the sports industry, putting service and encouraging development in the first place and reflecting the intention of the policy level to establish a policy environment for the high-quality development of sports industry. The word "management" has dropped to the ninth place in terms of word frequency compared with the previous stage, which indicates that the strong administrative initiatives have begun to decrease at this stage, replaced by "supervision and management," with more guiding opinions and fewer management policies, which means that the functional policies are increasing. In other words, the number of functional policies is increasing.

On the whole, during this period, China's sports industry, against the background of comprehensively deepening reform, has seen the continuous advancement of various reform measures, the rapid entry of sports resources into the market, the release of great value, and the historic breakthrough in the development of China's sports industry, which is becoming more and more prominent in the national economy, and is serving the national strategy, and has become an important part of the national economic system. The framework of the sports industry policy system has already taken shape, with distinct levels and rich contents, and the number of functional policies has gradually increased.

**Table 6. High-frequency theme words (top 20) during strategic acceleration period (2014 to 2022)**

keywords	word frequency	keywords	word frequency	keywords	word frequency	keywords	word frequency
sport	5957	event	1517	manage	1197	tourism	897
health	778	physical education	2729	build	1421	fitness	1085
organize	884	encourage	768	develop	2634	ice and snow	1332
strengthen	1040	facilities	851	system	751	service	1775
society	1198	project	1024	football	835	consumption	724

## **5 Semantic network characteristics of China's sports industry policies**

### **5.1 Semantic network mapping of sports industry policies in different stages**

In the germination period, "sport" was the core word, "advertising," "sponsorship," "competition," "enterprise," and "fund" also became the keywords (Fig.3). "enterprise," and "capital" also became key central words (Fig.3), during which the government formulated a series of policies on sports business activities involving sports sponsorship, sports advertising, social forces to hold sports competitions, sports tourism and other fields, with the main focus on sports, The value of sports has been valued.

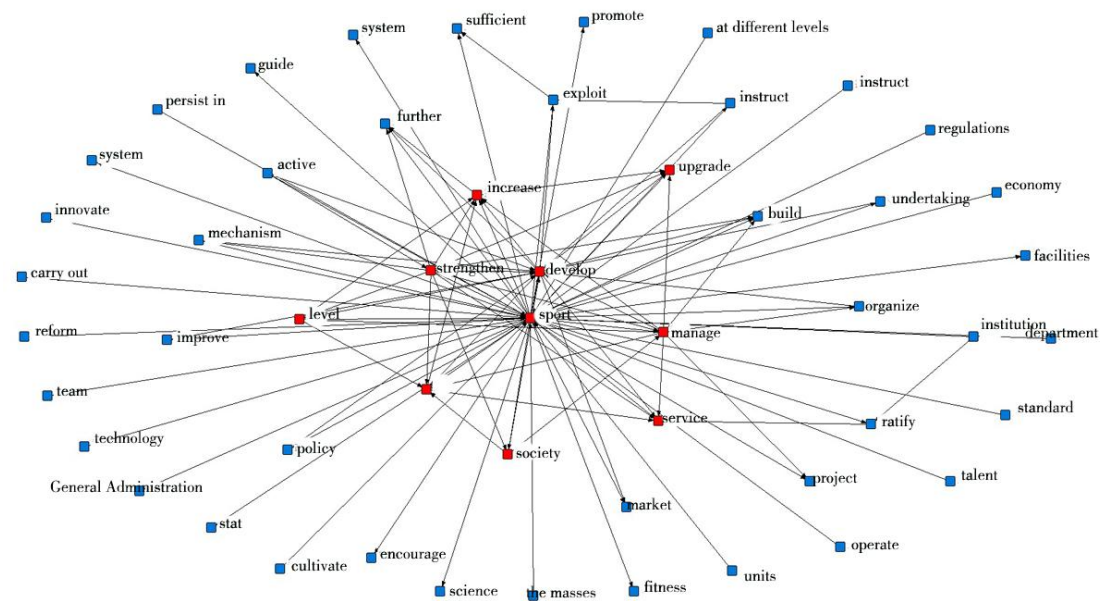
In the initial period, "sport," "manage," "regulations," and "units" are the key clustering phrases that highlight the importance of sports participation policies. This highlights the intention of the policy to regulate the various subjects involved in the sports industry. Meanwhile, another cluster consists of "develop," "strengthen," "society," "market," and "operate". "manage" reflects the obvious supportive orientation of the sports industry policy (Fig.4).

During the stable development period, "sport," "develop," "construction," "strengthen," "improve," "service," "society", and other components of the group indicate that the state's support for the sports industry has been further enhanced compared with the previous stage (Fig.5).

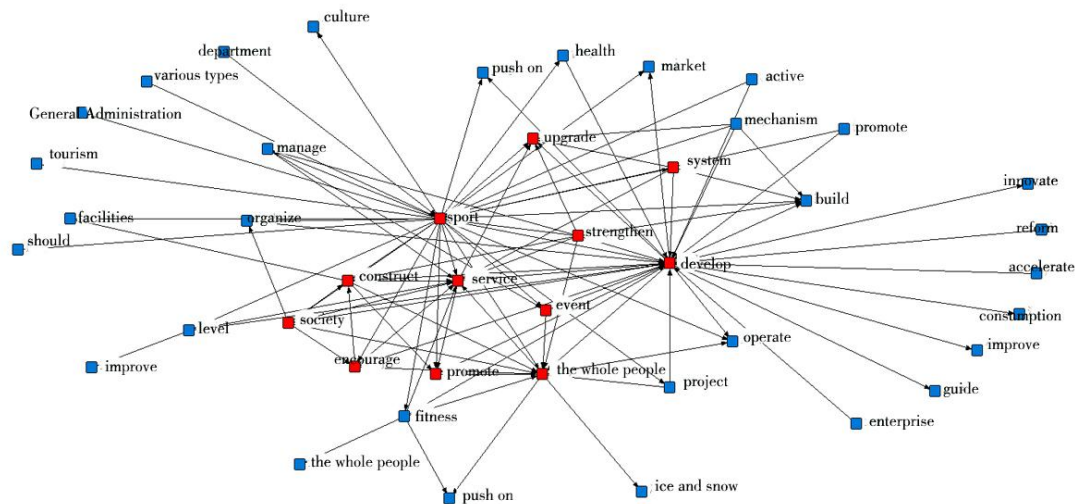
In the period of accelerated advancement, there is a significant increase in the number of key nodes of the network, with increased connectivity and complexity, and "sport," "service," "enhance," "improve," "develop," "construction," "encourage" "promote," "to urnaments" and so on become the central words, indicating that the state attaches more and more importance to the sports industry (Fig.6). Compared to the previous three phases, the enforceability of policies in this phase is significantly higher. In the acceleration phase, sports industry policies have been targeted to address the overly broad and macroscopic nature of previous sports industry policies through specific measures such as formulating key areas, setting standards, promoting collaboration, and formulating implementation programmes and working guidelines.







**Fig. 5. Semantic network diagram of China's sports industry policies during the stable development period (2001-2013)**



**Fig. 6. Semantic network diagram of China's sports industry policies during the strategic acceleration period (2014-2022)**

## 5.2 Semantic Network Characteristics of Sports Industry Policies at Different Stages

In the germination period, from the high-frequency phrases such as "sport-manage," "sport-construction" and "sport-develop" (Table 7), it can be found that the value-exploitation of sport has been emphasised. "and other high-frequency phrases (Table 7), it can be found that the value mining of sports is valued. The high-frequency phrases such as "advertising-sports," "sports-sponsorship," and "sports-match" show that the value mining of sports has been emphasised. Moreover, other phrases with high correlation strength can be

found that although the core concept of the sports industry has not yet been mentioned, various business activities are gradually being carried out. Due to the timeliness of the policy, the policy body at the time did not fully understand the industry's development and only managed the important sports business activities as relatively independent objects and carried out pilot projects on a localised basis.

In the early formative years, the phrase "sport-manage" has the highest strength of association during this period, suggesting a shift in policy towards increased regulation of the industry as a key policy concern. Secondly, high-frequency phrases such as "sport-develop," "sport-society," and "manage-sport" were found. The emergence of high-frequency phrases such as "sport-develop," "sport-society" and "manage-sport" shows the increasing importance of policies for the sports industry and implies that China's policies for the sports industry are gradually transforming towards promoting the cultivation and development of the industry.

During stable development period, "sport-develop," "active-sport," "sport-improve", "strengthen-develop," "sport-level," "strengthen-sports," "develop-improve," "sport-construction," "develop-construction," "sport-further" and other high-frequency correlatives fully demonstrate the degree of importance the state attaches to the sports industry at this stage.

During the strategic acceleration period, "sport-develop," "sport-event," "sport-fitness" and "sport-event," "sport-fitness" and "project-sports" can also show the degree of importance the state attaches to the sports industry and its support for the sports project industry, sports competition and performance industry, and sports fitness and leisure industry. At this stage, the environment for the development of the sports industry has been optimised continuously, the market potential has been released continuously, and the basic conditions for the high-quality development of the sports industry have been consolidated and upgraded in this period. The typical development pattern of such industries as competition performance and fitness and leisure, supported by the manufacture of sports goods and the operation of venues, sports training, sports intermediaries and sports media, has been formed.

**Table 7. Semantic correlation table of high-frequency words in China's sports industry policies at different stages (top 15)**

the germination period (1978—1991year)		the initial formation period (1992—2000year)		the stable development period (2001—2013year)		the strategic acceleration period (2014—2022year)	
related words	association strength	related words	association strength	related words	association strength	related words	association strength
advertising — sport	37	sport—manage	167	sport—develop	269	sport — develop	747
sport—stat	32	sport—develop	118	sport—manage	215	sport—event	534
sport—manage	31	units—sport	109	sport—service	202	sport —	520
sport —	30	sport —	93	strengthen —	193	service	
sponsorship		administrative		sport		develop —	503
sport—match	25	department		sport—build	164	physical	
		operate—sport	75			education	
						sport —	441
						physical	
						education	
units —	25	department —	71	sport—society	150	sport—build	438
sponsorship		manage					
regulations —	25	strengthen —	66	sport—upgrade	140	sport —	421
sport		manage				society	
sport—build	24	units —	61	sport—organize	133	sport —	415
		undertaking				manage	
sport—develop	23	sport—society	60	sport—project	121	sport —	403
						organize	
advertising —	23	regulations —	60	develop—build	112	develop —	394
sponsorship		manage				service	
strengthen —	22	competition —	60	active—sport	112	develop —	388
sport		sport				promote	
the masses —	22	sport —	59	strengthen —	111	develop —	371
sport		organize		develop		build	
sport		strengthen —	58	sport—level	109	sport —	349
different levels	22	sport				fitness	
—sport		lottery—sport	56	develop —	108	project	
train—sport	22			upgrade		physical	
						education	
directly under	21	manage—sport	55	sport—further	105	strengthen —	317
—sport						develop	

## 6 Conclusion

Analyzing China's sports industry policies texts from 1978 to 2022 using a social network, policy subject headings and semantic network analysis, we found that with the practical development of the industry, the policy subjects of China's sports industry policies have become more and more diversified, presenting the characteristics of the synergistic development of multiple subjects, and the content of the policy has evolved from emphasizing on administrative management and industry support to incentive development. Meanwhile, the power of the policy language has been comprehensively enhanced. At the same time, the language power of policies has been strengthened comprehensively.

Firstly, regarding policy subjects, the model of independent supervision by a few departments in the past has shifted to multi-departmental cooperation in governance. This

evolution stems from the increase in the scale, specialization and intensification of the sports industry, which in turn triggered the government's recognition of the integrated nature of the industry and the realization that it is difficult for a single subject to realize the policy expectations fully. The government has begun exploring cross-sectoral collaborative governance between multiple sectoral authorities. This shift reflects a change in the governance model from single-agent to multi-agent collaboration, providing a more diverse and flexible policy formulation and implementation governance mechanism.

Secondly, China's sports industry policies have been adjusted regarding policy orientation, gradually shifting from constraining management to incentivizing development and reconstructing the whole industry chain. From 1978 to 2000, considering the actual situation of the industry's development and the uncertainty of the future, the policy mainly focused on regulation. However, as the country's perception of the sports industry improved, the policy focus shifted from single-content regulation and market order maintenance to industrial development. Since 2000, incentives and support for the industry have become the key demands of policies. After 2014, a series of incentive policies were launched for each sports industry and key formats, which have provided a strong impetus for the high-quality development of China's sports industry.

Thirdly, in terms of policy language power, the policy language power of China's sports industry has gradually gone from vague and lacklustre to comprehensively enhanced. In terms of policy semantic network, along with the apparent increase in the number of sports industry policy texts, the network density of policy language and linking points have also increased proportionally, and the constantly updated policies can better respond to the interests of different subjects. Regarding policy knowledge, the development of industrial practice and the increase in policies have made the policymakers deepen their understanding of policy issues. The accumulation of knowledge has also increased so that the pertinence and appropriateness of the policies have been enhanced, which is reflected in the fact that the contents of many policies can be changed timely and appropriately by the phases of the sports industry. Regarding policy expression channels, the policy subject and the object in the sports industry's budding and initial formation period show a more apparent legitimate relationship of trust and obedience. However, in the stable development period and strategic acceleration period, the policy of the sports industry has formed a flexible combination of expression guided by macroplanning, regulated by administrative regulations and facilitated by various opinions. There is more interaction and complicity between the policy subject and the object

of policy, which means that the diversity and flexibility of policy expression channels have increased. There are more interactions and collusion between policy subjects and objects, enhancing the diversity and flexibility of policy expression pathways.

The evolution characteristics and development trend of sports industry policies over the past 40 years show that the initial formation of multi-departmental, cross-field and wide-coverage policy combinations, the synergy of policy subjects, the directionality of policy objectives, the scientificity of policy contents and the increasing strength of policy effectiveness have created a favourable policy environment and a firm policy kinetic energy for the development of sports industry. Under the accelerated evolution of the scientific and technological revolution and high-quality development of the economy, the sports industry has ushered in new development opportunities and, at the same time, put forward new and higher requirements for industrial policies. Sports industry policies need to be more precise, intelligent, and comprehensive, and they should aim at supporting high-quality sports economic activities, giving full play to the policy synergy, and then leading and promoting the high-quality development of the sports industry more effectively.

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