

Comparative Study of the Sports Industry Between China and the United States

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Abstract. In recent years, the sports industry in China has experienced vigorous development, with frequent investments and increasing attention from various sectors of society. However, there is still a significant gap between China and Western developed countries in the sports industry. This article compares the current development of the sports industry in China and the United States, and provides relevant policy recommendations for the better development of the sports industry in China.

Keywords: Sports industry, China-US comparison.

1. Introduction

China's rapid economic growth has brought about profound changes in Chinese society, and the achievements of the sports industry in China have also been remarkable. Since the "Twelfth Five-Year Plan" for the development of the sports industry, significant progress has been made in China's sports industry, mainly reflected in the substantial growth of the industry's scale and the optimization of its structure. In October 2014, the State Council issued the "Opinions on Accelerating the Development of the Sports Industry and Promoting Sports Consumption," also known as Document No. 46, and various departments and local governments have subsequently introduced documents on how to implement and enforce the "Opinions." This series of policy planning has provided policy support for the sustainable and healthy development of the sports industry. In July 2016, the General Administration of Sport issued a notification on the "Thirteenth Five-Year Plan for the Development of the Sports Industry," which is the first five-year plan for the development of the sports industry after the "Opinions" and provides clearer and more specific implementation measures based on the "Opinions." The sports industry in the United States has gone through more than a hundred years of commercialization. From its inception to its current prosperity, the four major professional leagues in the United States are the most commercialized in the world, and their multinational sports management companies are also the most advanced in the world. The United States is the largest consumer of sports in the world, and China's sports industry is undergoing rapid development and is bound to reach new heights. By comparing and drawing on the development patterns of the sports industry in the United States, this article provides references for the current layout and planning of China's sports industry development.

2. Definition and Classification of the Sports Industry

First, the definition of the sports industry. According to a search in a Chinese dictionary, "industry" refers to private property, productive undertakings, and specifically, modern industrial production departments. The development of the sports industry in China came relatively late, and different experts and scholars have conducted research and put forward various definitions of the sports industry. However, the most authoritative definition of the sports industry in China is the "Classification of Sports and Related Industries (Trial)" jointly issued by the National Bureau of Statistics and the General Administration of Sport. According to this classification, the sports and related industries refer to activities that provide sports services and products to the general public, as well as activities related to these activities.

Second, the classification of the sports industry. In September 2015, based on Document No. 46, the National Bureau of Statistics formulated the "National Sports Industry Statistical Classification"

based on the "National Economic Industry Classification." This classification divides the sports industry into three levels. The first level includes sports management, competition and performance, fitness and leisure activities; sports venues, intermediaries, media and information, and other sports-related services; sports training and education, equipment and related product manufacturing, sales, trade agency and rental, venue and facility construction, etc., totaling 11 major categories. The second level consists of 37 subcategories, and the third level consists of 52 smaller categories.

3. Literature Review

3.1. Literature Review of the Sports Industry in China

Due to the relationship between China's social system and economic structure, sports have always been considered a social welfare cause without commercial participation. Similar to the Soviet sports model, both competitive sports and mass sports have been developed through state-established opportunities and funding, with related enterprises being state-owned entities. This has led to the absence of the concept of "sports industry" in China before the introduction of market economy brought about by the reform and opening up. Instead, it was referred to as the politically influenced "sports cause." The concept of the "sports industry" only emerged in China in the 1980s, with the promotion of economic development and economic system reforms. Under the guidance of economic development and economic system reform, China faced the need for industrial structure adjustment and transformation, as well as aligning industry classification with international standards. In developed countries, sports are classified as the third level of the tertiary service industry, alongside education, culture, and healthcare. In 1985, the State Council promulgated the "Method of Calculating Gross Domestic Product," which classified them as "sectors that provide services to improve the scientific and cultural levels of the population" [4].

The reform and opening up provided opportunities for Chinese sports professionals to learn about and understand the knowledge and operations of developed countries such as the United Kingdom and the United States in sports, competitive sports, sports science, and sports industry management. The commercial operation models of developed countries' sports industry and the highly developed sports industry economic chain and professional commercial events have greatly inspired Chinese sports workers. The development and prosperity of the sports industry in China can be better promoted through market-oriented and commercialized development models, rather than relying solely on the state. As an important support and component, the sports industry has attracted significant attention and research from Chinese scholars. According to the literature statistics from the China National Knowledge Infrastructure (CNKI), there are currently a total of 12,520 documents related to sports industry research. After sorting and analysis, the top eight research topics are: sports industry, sports, sports industry development, competitive sports, competitive sports, enterprise management, sports consumption, and fiscal management.

With the development of reform and opening up and the market economy, the sports industry in China began to shift from government-led to a new model of professional market-oriented development. The first professional league in China, the Chinese Football Association Super League, was established in the 1990s. However, it was not until 2005 that the development became standardized and formed an industry chain, lagging behind the United States by more than a hundred years. The strict administrative management hindered the effective commercialization of China's sports industry, while also constraining the speed and scale of developing professional leagues, major events, venue management and operations, and club development. In 2014, the State Council issued Document No. 46, which officially put the Chinese sports industry on a fast track of development. This emerging industry with great potential, attracting numerous capital investments, ushered in a new era of the sports industry.

The earliest literature analyzing and researching the application of knowledge graph in the field of sports was written by Wang Qi and Fang Qianhua in 2010. Their article, "Research Status and Development Trends of International Olympic Sports Based on Knowledge Graph," summarized the

current status and development trends of international Olympic sports research and provided suggestions for Olympic sports and sports science research in China's post-Olympic era. Zhang Yiheng, in 2015, conducted a visual analysis of China's sports industry research based on the knowledge graph, proposing the need for the integration and development of China's sports industry with related industries.

3.2. Literature Review of the Sports Industry in the United States

The development of the sports industry in the United States, like various social phenomena, has gone through a process. The Industrial Revolution in the 18th century brought about the most significant liberation of labor in human history. At the same time, outdoor sports favored by the British middle class provided new opportunities for the development of the sports industry in the UK, and numerous outdoor sports activities formed the prototype of clubs through expansion and standardized management [11]. Although the birthplace of the sports industry is in the UK, its rapid development and global influence occurred in the United States. In the 20th century, relying on the club's commercial model, the United States established professional sports leagues [12], ushering the sports industry into a new era of commercialization, industrialization, and chain development. It transformed sports, originally belonging to social culture, into a billion-dollar industry that exists today.

After the end of World War II, the United States experienced rapid economic growth, and the high level of consumerism led to new demands for the sports industry. Since then, the sports industry in the United States has been propelled forward through media, sports events, professional sports, and professional sports management companies [13].

Through years of development, the United States has formed a mature industrial model for professional sports in terms of structure, content, and management systems. Professional sports and mass sports serve as the foundation for the development of the sports industry, expanding into a scaled industry chain that includes sports management, sports and fitness, sports media, sports agents, sports tourism, and recreational sports. Capital and scientific guidance have driven its scientific and professional development, propelling the US sports industry to a leading position worldwide [14].

Gratton, an American scholar, points out that the structure of the sports industry in the United States resembles the social structure—a pyramid-shaped structure. At the top of the pyramid are elite groups involved in sports professional management companies, collegiate sports associations, clubs, and sports betting. In the middle are non-professional sports clubs, sports event companies, and at the bottom are mass sports, including sports associations and fitness clubs. Humphreys defines the sports industry as a geometric body composed of three parts: audience (participants in sports activities or behaviors), media (sports events), and behavior (watching sports events or related behaviors). This definition is closely related to the highly developed sports events and related integrated industries in the United States. After the significant development of the sports industry, the classification theories of the industry in the United States have been applied to establish a scientific sports industry classification model. The sports industry in the United States consists of three major categories: 1) sports performance, which includes sports events, sports organizations (for-profit or non-profit), sports training, fitness clubs, sports betting, etc.; 2) sports products, which encompass products that meet the needs of audiences or athletes in sports activities; and 3) sports marketing, which covers industries related to sports economics and management [17].

4. Overview of Sports Industry Development in China and the United States

4.1. Overview of Sports Industry Development in the United States

The commercialization of the sports industry in the United States began as early as the early 19th century. In 1871, the National Association of Base Ball Players, the country's first professional sports association, was established. In 1903, it evolved into Major League Baseball (MLB) through the joint formation of the National League and the American League. After addressing initial challenges, the

sports industry in the United States systematically developed the entire sports consumption market through the establishment of various competition rules, such as regular season games, All-Star games, playoffs, interleague games, and other means. It also expanded into sports such as football, basketball, and ice hockey, forming the current four major professional sports leagues in the United States, namely the National Football League (NFL), National Basketball Association (NBA), and National Hockey League (NHL).

From the 1960s onwards, with the rapid economic development of capitalist countries and the significant increase in people's income and leisure time, the sports industry in the United States also experienced rapid growth. The improvement in living standards promoted the rise of leisure and fitness activities, and many sports quickly gained popularity and widespread participation among the general public. Sports such as winter sports, golf, and tennis witnessed continuous improvement in levels of participation in the United States. Through continuous market development and improvement of competition rules, professional sports were promoted, and under the operation of professional sports management companies, revenue levels increased through ticket sales, endorsements by sports celebrities, and the sale of television broadcasting rights. Cultural exchanges were facilitated through sports events, including international events held in different countries, and the inclusion of talented international athletes in the four major leagues, thus propelling American professional sports to the world stage.

The sports industry in the United States is currently highly mature. With mass sports and professional sports as its backbone, under the leadership of advanced sports management companies, various categories of the sports industry, including sports competitions, sports and fitness, venues, intermediaries, media information, and their derivative industry chains, have experienced comprehensive development.

4.2. Overview of Sports Industry Development in China

The sports industry in China has a strong administrative character, and the process of industrialization is still in its early stages. The socialization and professionalization of sports in China began in the 1990s, with professional football taking its first steps towards commercialization in 1994. From 1994 to 2003, China had the A-League, which was later transformed into the Chinese Super League (CSL) in 2004. However, the initial operation of the league was chaotic, and there was even a period when China Central Television (CCTV) stopped broadcasting CSL matches. Through continuous improvement and market-oriented reforms, the CSL brand value has significantly increased. In the 2015-2016 winter transfer season, the CSL became the league with the highest investment globally, with total club investments exceeding 300 million euros.

The level of commercialization in China's sports industry is relatively low. Activities such as sports management, competitive performances, and the mobility of professional athletes have a low degree of commercialization. The introduction of a series of policies and regulations, such as the State Council's "Opinions on Accelerating the Development of the Sports Industry and Promoting Sports Consumption" in 2014 and the General Administration of Sport's "Thirteenth Five-Year Plan for Sports Industry Development" in 2016, indicates that China's sports industry is entering a period of vigorous and rapid development.

The commercialization of sports in the United States has a history of over a hundred years, with rapid development in professional sports and leisure and fitness activities since World War II. Currently, the growth rate of the sports industry far exceeds that of the GDP, reflecting the strong and sustained vitality of the sports industry. On the other hand, the sports industry in China is still in the transitional phase from administration to industrialization. With the improvement of commercialization, it has the potential to replicate the development path of the sports industry in the United States.

5. Comparison of Major Categories in the Sports Industry in China and the United States

5.1. Comparison of Sports Competition and Performance Activities

The sports industry in the United States is highly developed, with sports competition and performance activities at its core. The major events are the four major leagues in North America. In 2014, the total revenue from sports competition and performance activities in the United States reached \$36.9 billion, with \$26 billion of the revenue coming from the four major leagues. The revenue from Major League Soccer and college sports associations amounted to \$10.9 billion. Among professional sports in the United States, the four major leagues hold a central position, with the National Football League (NFL) generating the highest revenue. The total revenue of the league is \$9.6 billion, with operating revenue of \$1.7 billion, making it the most successful market-oriented sports league in the world.

The profitability of professional sports in China's sports industry is still relatively lacking. In 2015, the total output value of sports competition and performance activities in the sports industry was 14.95 billion RMB, an increase of 5.26 billion RMB from the previous year. As the largest sports management company in China, the Chinese Super League Company had a total annual revenue of 616 million RMB in 2015, with 386 million RMB from advertising sponsorship, 150 million RMB from naming rights, and 80 million RMB from media broadcasting rights. The total revenue of Chinese Super League clubs was 2 billion RMB, but their profitability is quite limited considering the massive investments.

5.2. Comparison of Sports Intermediary Services in China and the United States

Sports intermediaries are involved in various agent relationships to facilitate transactions of sports products or services. They effectively connect various market entities in the sports industry. The core business of sports intermediary services is sports agency representation, which also includes consulting, marketing, and event planning. In the United States, intermediary services play a crucial role in the sports industry market. The vibrant development of the sports market in the United States relies on the lubricating and facilitating role of sports intermediary services as a connecting link. According to data from Plunkett Research, sports advertising expenditure in the United States in 2015 reached \$34.9 billion. Creative Artists Agency (CAA) and International Management Group (IMG) are the world's largest sports agency and marketing giants, representing a host of sports superstars. Through marketing and management efforts, they maximize the commercial value of athletes and promote the prosperity of the sports industry market.

In China, due to the athlete development system, athletes are primarily under the jurisdiction of their training units, sports bureaus at various levels, industry associations, and management centers of various sports projects. Athletes have limited autonomy. The endorsements and commercial development of well-known athletes are mostly controlled and managed by administrative departments, with the majority of the income feedback to the training units. This has led to an awkward position for sports intermediary services in the Chinese sports industry market, with a harsh survival environment and their role not being prominently highlighted.

The release of the State Council's "Opinions" in 2014 provided a favorable opportunity for the development of sports intermediary services. The "Opinions" mentioned sports intermediaries multiple times. Intermediary services are an indispensable part of improving the sports industry system, cultivating diversified industry entities, optimizing the market environment, and attracting social participation. Currently, the sports intermediary industry in China is still in its early stages, with most sports intermediary companies being newly established, a shortage of professionals, and a lack of specialized personnel. Although the total output value of sports intermediary services in 2015 was 4.7 billion RMB, the share of domestic brokerage companies in this market was not significant.

5.3. Comparison of Sports Media and Information Services in China and the United States

In the United States, ESPN is the leading sports media company, and traditional major broadcasting companies such as NBC, ABC, CBS, and FOX are also major channels for sports broadcasting. These companies have a high level of production in live event coverage, sports news, and game analysis. They have extensive experience and provide excellent audiovisual experiences for sports enthusiasts. These sports media companies spend tens of millions to hundreds of millions of dollars annually to purchase broadcasting rights for sports events and other sports categories. They then charge significant fees to sponsors who want to market and advertise their products during sports events and programs, and distribute the content to numerous paid subscribers. ESPN currently has 98 million domestic users and over 200 million viewers worldwide, generating annual revenues exceeding tens of billions of dollars.

The release of the "Opinions" has relaxed the restrictions on broadcasting rights for sports events. Except for the Olympic Games, Asian Games, and FIFA World Cup, other sports events can be independently purchased by sports media, breaking the monopoly of CCTV over sports events and optimizing the market environment. Tencent secured the exclusive online broadcasting rights for the NBA for five years with a bid of 3.1 billion RMB. OTT Power acquired the exclusive broadcasting rights for the Chinese Super League from CCTV for five years with a bid of 8 billion RMB, and LeSports acquired the exclusive new media rights for the Chinese Super League for two years from OTT Power for 2.7 billion RMB. Chinese audiences are accustomed to watching sports events for free on CCTV's Channel 5, and although there is significant growth in online video paid subscribers, it is still challenging to convince viewers to pay for sports event viewing. It is hoped that sports media can improve program production and learn from the ESPN model to achieve profitability.

6. Countermeasures for the Development of China's Sports Industry

6.1. Actively Introduce Relevant Policies to Support the Development of the Sports Industry

The government should actively formulate policies that promote the healthy and efficient development of the sports industry. Market-oriented policies supported by local governments should be implemented to further stimulate the development of the sports industry. At the same time, efforts should be made to attract private investments in the sector and establish a combination of government and foreign investment in the industry. The government should provide better development policies and offer professional guidance for the sports industry. Foreign investments can be expanded while adhering to relevant government policies and following professional guidance. Reasonable development directions and goals should be planned, and sports experts should be actively invited to provide detailed guidance, promoting positive development in the sports industry. Enterprises can benefit from this and achieve a win-win situation for the government, the public, and the companies. In the current era of the internet, the government can make full use of online resources such as WeChat public accounts, Douyin, and celebrity endorsements to promote the development of the sports industry. Additionally, the government should actively enrich sports professional think tanks to conduct relevant analysis of the sports industry, formulate reasonable development directions, and guide private capital to steer the sports industry in the right direction. The government should also intervene in the industry when necessary, coordinating and promoting the vigorous development of the sports industry through the collaboration of the government, private investments, and public participation.

6.2. Increase Promotion of the Sports Industry and Enhance Public Participation in Sports Consumption

In the rapid development of the sports industry, it is not only necessary to increase investment but also to intensify the promotion of the sports industry, including promoting sports exercise and sports-related services. The public should have a better understanding and awareness of sports, actively

participate in sports, and appreciate the charm and benefits brought by sports. This will encourage them to engage in sports consumption and foster a positive and active social atmosphere for nationwide fitness. It is essential for sports companies and enterprises to promote the sports industry, sports consumption, and nationwide fitness through extensive publicity. Local governments and relevant institutions should also fulfill their responsibilities and engage in robust promotion of the sports industry. For instance, fitness slogans can be displayed in public places, scientific fitness videos can be played at subway and bus stations to provide knowledge, and community gatherings and corporate team-building activities can organize sports competitions, fun sports events, and active participation by the public. By utilizing various methods, the public's enthusiasm for sports can be enhanced, their interest in sports can be increased, and their active participation in sports consumption can be encouraged. This will not only promote the development of the sports industry and increase public participation in sports consumption but also significantly improve the overall health of the population, contributing to the long-term and stable development of China's socio-economy.

6.3. Improve the Structure of the Sports Industry and Actively Reduce Regional Disparities in Sports Industry Development

Currently, China's sports industry exhibits an irrational structure and uneven regional development. It requires a transformation from being a manufacturing power to a service-oriented sports industry, actively integrating the sports industry and promoting intelligent development to meet the needs of different sports consumers. During the transformation of the sports industry, it is essential to emphasize the integration of sports with various professions, such as sports tourism, sports management, sports rehabilitation, and sports medicine. By integrating and exchanging with other industries, the scientific and diversified aspects of sports can be enhanced, providing further development channels for the sports industry. The development of sports technology should also be emphasized, as it can better showcase the allure of sports to consumers, attract their attention, invigorate sports consumption, meet consumer expectations regarding the integration of technology into sports, and make sports activities more convenient and efficient. While actively developing the service sector of the sports industry, the importance of the sports manufacturing industry should not be neglected. The strong momentum in the sales of sports products should be maintained, ensuring the quality of sports equipment and products. This will create a virtuous cycle in the sports industry, promoting balanced development in the sports industry structure. To address the significant disparities in regional sports industry development, different measures should be tailored to each region's specific circumstances. Furthermore, active communication and learning should take place among regions. Developed regions should actively learn from advanced sports management experiences and development directions, while offering suggestions and advice to less developed regions. This can include sharing successful experiences and exemplary cases, providing guidance from sports experts, actively sharing foreign investments, and attracting investments in the sports industry in less developed regions to improve their development patterns. Improving the structure of the sports industry allows for the development of rational and customized plans based on the local sports industry's actual conditions, guiding the industry in the right direction, and promoting coordinated development in the sports industry.

6.4. Cultivate High-quality Sports Talents to Contribute to the Development of the Sports Industry

Firstly, it is important to understand the types of sports talents needed in the sports industry based on market demands. Talent cultivation should be market-oriented, focusing on meeting the market's needs. Efforts should be made to explore and cultivate high-quality, high-level, and versatile sports talents. Detailed talent development objectives should be established, gradually expanding the scope of talent cultivation. In addition to government and educational institutions' involvement in talent cultivation, society and enterprises should also pay attention to actively cultivating sports talents. The government should provide the necessary policy support for talents, allocate funds to support

educational institutions, increase enrollment and training efforts for sports talents, and actively offer diverse sports-related majors with an emphasis on internationalization, knowledge, and talent cultivation. Educational institutions should focus on developing students' practical abilities, sports knowledge, and cultivate talents with strong skills, learning capabilities, training capabilities, and overall capabilities. They should guide sports students to actively participate in practical activities in sports companies and society. Society should show respect for sports talents, creating a positive social atmosphere that cares for, nurtures, and appreciates talents. Sports enterprises should improve the welfare and salary packages for sports talents, increasing their sense of belonging and mission to the companies. This will enhance their motivation and drive for progress, resulting in active contributions to the development of sports enterprises and the sports industry. Furthermore, sports enterprises should regularly organize training seminars for talents, inviting sports experts to teach and improve employees' learning and sports-related professional capabilities. This will enable employees to identify and solve problems in practical work.

7. Conclusion

As a significant emerging industry in China, the sports industry plays an important role in promoting economic development. While vigorously developing the sports industry, it is crucial to grasp the policy direction, actively follow the government's development guidelines, and adhere to its principles. It is necessary to actively promote public participation in sports, enhance people's happiness in engaging with sports, and improve their sense of accomplishment in participating in sports activities. Diverse sports activities should be developed to promote the diversified development of the sports industry, increase the promotion of the sports industry, sports activities, and nationwide fitness. Efforts should be made to improve the structure of the sports industry, steadily upgrade the industry, and reduce regional disparities in development. Active exchanges and cooperation in the field of sports should be encouraged, and high-quality sports talents should be cultivated to address the talent shortage in the sports industry. Improving the welfare and treatment of sports talents is crucial to overcome the challenges faced by the sports industry in China. Through the joint efforts of the government, society, the public, and enterprises, the coordinated development of the sports industry can be achieved. By implementing the proposed countermeasures, China's sports industry can thrive, contributing to the country's economic growth, promoting public health and well-being, and fostering a vibrant and balanced sports ecosystem.

In conclusion, the development of the sports industry in China requires a comprehensive approach that involves supportive government policies, increased promotion and public participation, structural improvements, and talent cultivation. With these strategies in place, the sports industry can reach new heights and contribute significantly to the nation's overall development.

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