

# Analysis of the current situation of outdoor sports: A comparative study of cities in China

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**Abstract:** The purpose of this paper is to explore the current situation of outdoor sports in various cities in China, and to reveal the development trend and differences of outdoor sports in China by comparing and analyzing the development status of outdoor sports, policy support, characteristics of the participating groups, and existing problems in different cities. It is found that there are obvious regional differences in the development of outdoor sports in various cities, and policy support and social cognition have an important impact on the development of outdoor sports.

**Keywords:** outdoor sports; urban comparison; development status; policy support; participant groups

## 1. Introduction

### 1.1. Background and significance of the study

In recent years, with the improvement of people's living standards and the enhancement of health consciousness, outdoor sports have developed rapidly in China. More and more people have begun to participate in outdoor sports to enjoy the fun and challenges brought by nature. At the same time, the government and all walks of life have begun to pay attention to the development of outdoor sports and have increased their investment in and support for the outdoor sports industry. In this context, research on the current situation of outdoor sports not only helps us better understand the development trend and market demand of outdoor sports, but also provides scientific basis for policy making and industrial development.

### 1.2. Definition and classification of outdoor sports

Outdoor sports refers to sports activities conducted in natural environment with the main purpose of exercising the body, enjoying the mood and challenging the self. It covers a wide range of types such as hiking, mountaineering, rock climbing, cycling, rafting, gliding, etc., each of which has its own unique charm and challenge. Outdoor sports can not only exercise people's physical quality and improve their physical functions, but also cultivate people's courage, perseverance and teamwork spirit, which is of great significance to the overall development of individuals.

### 1.3. Purpose of the study and presentation of the paper

The purpose of this paper is to comprehensively analyze the current situation of outdoor sports in China, including the characteristics of the participating population, the distribution of the types of sports, and the state of industrial development. By comparing the development of outdoor sports in different regions, it reveals the geographical differences and development characteristics of outdoor sports. At the same time, this paper will also explore in depth the factors affecting the development of outdoor sports, such as policy support, economic level, social culture, etc., aiming to provide targeted suggestions and countermeasures for the development of outdoor sports in China.

## 2. Analysis of the current situation of outdoor sports

### 2.1. Overview of outdoor sports in the country

#### 2.1.1. Number of participants and growth trends

According to the National Development and Reform Commission (NDRC), by the end of 2021, the number of participants in outdoor sports nationwide exceeded 400 million, and the trend of mass, all-age, and lightweight has already appeared. 2022 to 2023, China's outdoor sports industry continued to heat up, with ice and snow sports, road running and cycling, and off-road camping showing explosive growth, and a number of fields have recovered to or even exceeded the level before the epidemic<sup>[1]</sup>. Among them, the post-90s have become the largest participation group. According to the data provided by Hornet's Nest, in the year 2022, among the outdoor sports participation groups, the post-90s accounted for 36.1%, followed by the post-80s group, which accounted for 32.5%, and these two groups accounted for 68.6% of the total outdoor sports population, becoming the main force of outdoor sports participation. According to China Outdoor Sports Industry Development Report (2022-2023), China's outdoor sports industry will gradually recover and usher in a historic opportunity in 2022-2023, with strong growth in the market and an increase in the number of subjects, with the Post-90s being the largest group of participants and women becoming the main force.

#### 2.1.2. Application scenes are expanding

The main research field of outdoor sports focuses on mass sports, including outdoor clubs and mass leisure sports. Outdoor sports programs, mainly mountaineering, skiing, camping, cycling, hiking, Frisbee and so on, have gradually become the best choice for people's fitness. Especially in recent years, new sports programs represented by camping, Frisbee, paddle board, etc. are popular among young people, and the application scenes of outdoor sports are expanding.

#### 2.1.3. Consumption scale and industrial structure

The National Development and Reform Commission (NDRC), in conjunction with the State General Administration of Sport and other five departments, issued the Action Program for Promoting the Construction of Outdoor Sports Facilities and Service Enhancement (2023-2025), which proposes to promote the total scale of the outdoor sports industry to reach 3 trillion yuan by 2025. According to the program, in 2022, China's outdoor products market has reached 197.1 billion yuan, and the industry is expected to reach 211.6 billion yuan in 2023.

Under the effect of multiple factors such as policy support and demand growth, China's outdoor sports have developed into an industry with great vigor and potential. Data from the National Bureau of Statistics shows that the total size (total output) of the national sports industry in 2022 will be 3,300.8 billion yuan, with an added value of 1309.2 billion yuan. Compared with the previous year, the total output of the sports industry increased by 5.9% (before price factor, the same below), and the added value increased by 6.9%. From the perspective of industry structure, private enterprises are dominating the development of the industry. Data from Flush iFinD shows that there are 84,467 enterprises in China whose business scope involves outdoor sports, of which 79,968 are private enterprises; among the private enterprises whose business involves outdoor sports, there are 1,017 registered capitals of more than 10 million yuan, and 228 of more than 50 million yuan.

#### 2.1.4. Comparative analysis of outdoor sports in various cities

##### (1) First-tier cities: Beijing, Shanghai, Guangzhou, Shenzhen

###### *Development history and current status*

The development of outdoor sports in first-tier cities such as Beijing, Shanghai, Guangzhou, and Shenzhen had a similar history, starting in the 1980s, and gradually becoming more popular in the 1990s with the emergence of outdoor sports clubs.<sup>21</sup> In the 21st century, with the rapid expansion of the outdoor sports market in these cities as a result of economic development and increased awareness of people's health, the number of sports and events in these cities has become increasingly rich.

At present, the outdoor sports market in these cities is quite mature, with numerous clubs and organizations. At the same time, they are constantly innovating and developing to meet the demand for better outdoor sports experiences. In addition, the high acceptance of outdoor sports and the large number of participants among the residents of these cities have also contributed to the sustained development of the outdoor sports industry.

Overall, the development of outdoor sports in first-tier cities has shown a trend of diversification, specialization and scale, which has played a leading and demonstrative role for the development of outdoor sports in the country.

#### ***Policy support and facility development***

In terms of policy support, Beijing has formulated the Beijing National Fitness Implementation Plan (2021-2025), proposing the creation of more outdoor sports venues and events; Shanghai has issued the Shanghai National Fitness Development Outline, encouraging the participation of social forces in the construction of outdoor sports facilities; Guangzhou has introduced the Guangzhou National Fitness Implementation Plan (2021-2025), making it clear that the construction of outdoor sports venues and facilities should be strengthened; Shenzhen has introduced the Shenzhen National Fitness Implementation Plan (2022-2025), emphasizing the promotion of the popularization and development of outdoor sports. Guangzhou has introduced the Guangzhou National Fitness Implementation Plan (2021-2025), which explicitly seeks to strengthen the construction of outdoor sports venues and facilities; Shenzhen has launched the Shenzhen National Fitness Implementation Plan (2022-2025), which emphasizes the need to promote the popularization and development of outdoor sports.

With regard to the construction of facilities, Beijing has built numerous parks, green spaces and mountain trails, such as the Summer Palace and Fragrant Hills; Shanghai has created a number of theme parks for outdoor sports, such as the Minhang Sports Park; Guangzhou has constructed a large number of urban greenways and cycling paths, such as the Pearl River Greenway; and Shenzhen has constructed a number of hiking trails and seaside walks, such as the Lotus Hill Park. These facilities provide residents with a convenient environment for outdoor sports.

#### ***Characteristics and spending power of the participating groups***

Beijing, Shanghai and Guangzhou have a wider range of outdoor sports participant groups and stronger spending power. For example, the outdoor sports participant groups in Beijing are very broad, including people of all ages and different income levels, who are keen to participate in various outdoor sports activities, such as mountaineering, hiking, cycling, etc. Shanghai also has a wide range of outdoor sports participant groups, including people of different ages and different occupations. Shanghai's outdoor sports participant group is also very broad, including people of all ages and different occupations, who are keen to participate in a variety of outdoor sports activities, such as hiking, camping, kayaking, and so on. Guangzhou's outdoor sports participant group is also very broad, including people of different genders and different interests, who are keen to participate in a variety of outdoor sports activities, such as running, cycling, hiking and so on.

#### ***(2) Second-tier cities: Chengdu, Wuhan, Hangzhou, Nanjing, etc.***

##### ***Development characteristics and advantages***

Chengdu, Wuhan, Hangzhou and Nanjing, where outdoor sports developed later, are now in a rapid development stage and have gradually become an emerging force in China's outdoor sports. The governments of these cities have supported outdoor sports more vigorously and built more outdoor sports facilities. For example, the Chengdu government strongly supports the development of outdoor sports and has built many outdoor sports bases and parks, providing citizens with a wealth of outdoor sports venues. The Wuhan municipal government also attaches great importance to the development of outdoor sports and has constructed many greenways and parks to provide citizens with a comfortable environment for outdoor sports. The Hangzhou municipal government actively promotes the development of outdoor sports and has built many mountain bike trails and hiking trails, providing citizens with diversified choices for outdoor sports. The Nanjing municipal government also pays great attention to the development of outdoor sports and has built many sports parks and fitness trails, providing citizens with convenient conditions for outdoor sports. The development of outdoor sports in Chengdu, Wuhan, Hangzhou and Nanjing is characterized by local characteristics, such as the Sichuan route in Chengdu, the East Lake Greenway in Wuhan, the West Lake Run in Hangzhou, and the Zijin Mountain Cross-country in Nanjing.

##### ***Problems and challenges***

The development of outdoor sports market in Chengdu, Wuhan, Hangzhou and Nanjing is not mature enough, and there are some safety risks and service quality problems. For example, the facilities of some outdoor sports venues are not perfect and there are some safety risks; the service level of certain outdoor sports clubs is not high, which affects the experience of consumers; there are also some outdoor sports venues that are not standardized in management and there are some safety risks; and even the coaching

level of some outdoor sports clubs is not high, which affects the experience of consumers<sup>[2]</sup>.

### *Differences and linkages with first-tier cities*

There are certain differences and connections between second-tier cities such as Chengdu, Wuhan, Hangzhou and Nanjing and first-tier cities such as Beijing, Shanghai and Guangzhou in terms of outdoor sports. On the one hand, there are differences in their development history, policy support, and participant groups; on the other hand, there are connections between them in terms of facility construction, consumption capacity, and development characteristics. These differences and connections reflect the development level and characteristics of outdoor sports in different cities, and also provide opportunities for inter-city exchanges and cooperation. For example, the outdoor sports market in Beijing and Shanghai is relatively mature, with abundant outdoor sports resources and comprehensive outdoor sports facilities, attracting many outdoor sports enthusiasts. Chengdu and Wuhan are fast-growing outdoor sports markets, and have become emerging forces in China's outdoor sports scene in recent years. The outdoor sports markets in Hangzhou and Nanjing are also developing very fast, becoming one of the important centers for outdoor sports in China.

### *(3) Third-tier cities and below*

#### *Status and limitations of development*

Take Yunnan as an example, Yunnan is rich in natural resources, including magnificent mountains, rivers, lakes and other natural landscapes, which provide abundant resources for outdoor sports. However, compared to first-tier cities, third-tier and lower regions may not have sufficient outdoor sports infrastructure, such as trails, parking lots and rest facilities.

Yunnan outdoor sports industry resources promotion negotiation, the party secretary of the Yunnan Provincial Sports Bureau, Director Yang Zhonghua said "Yunnan is becoming a highland of openness, investment in the treasure land, the blessing of entrepreneurship." At present, the development of outdoor sports industry in Yunnan Province is in the optimization of the development structure, conversion of growth momentum of the offensive period. Yunnan will focus on the provincial party committee "3815" strategic development goals, promote the outdoor sports industry, the layout of the whole region, the coordinated development, accelerate the creation of "a circle, two areas, three belts and four networks" of outdoor sports industry layout, around the Dianzhong "Core Outdoor Sports Industry Circle", radiating "Territorial Sports + Territorial Tourism Demonstration Area", "City 1-hour Outdoor Sports Circle Demonstration Area", linking "Mountain Outdoor Sports Belt", "water outdoor sports belt", "plateau sports training belt", build "trail network", "cycling network", "self-driving network", "water network", help Yunnan to build the southwest outdoor sports cluster, and realize the high-quality leaping development of outdoor sports industry in Yunnan.

#### *Policy support and market demand*

On November 7, 2022, the General Administration of Sport, the National Development and Reform Commission, the Ministry of Culture and Tourism and other eight departments jointly issued the "Outdoor Sports Industry Development Plan (2022-2025)", which provides a top-level design for the outdoor sports industry in terms of innovation mechanisms, management methods, development patterns, etc., and guarantees the rapid and healthy development of outdoor sports.

Yunnan is a renowned "highland training resort" at home and abroad, a unique "outdoor sports paradise" and a wonderful "four-season event paradise". Yunnan along the border location of the internal attraction, with 47 million people in the provincial market, backed by 1.4 billion people in the domestic market, facing the 2.3 billion people in South and Southeast Asia market, the development of the outdoor sports industry based on a solid foundation, unique advantages, broad space, unlimited business opportunities, promising[3].

## **3. Factors affecting the development of outdoor sports**

### *3.1. Policy factors*

#### *3.1.1. Policy orientation and support at the national level*

The role of policy factors in promoting the development of outdoor sports is crucial, covering policy strategies and implementation effects at different levels from national to local.

Policy direction at the national level usually reflects an overall vision and commitment to the

promotion of outdoor sports. This implies not only direct investment in outdoor sports, such as the construction and maintenance of public outdoor sports facilities, but also the planning and implementation of programs aimed at increasing public health awareness and participation in active lifestyles. For example, the State may introduce outdoor education programs for youth aimed at fostering their interest in and habit of outdoor sports from an early age, or provide outdoor sports training courses for the public to enhance their skills and safety knowledge.

### ***3.1.2. Local government policy implementation and impact assessment***

Local governments play a direct and crucial role in policy implementation and impact assessment.

At the local government level, the strength of policy implementation and the evaluation of its effectiveness are more specific and have a direct impact on the accessibility and popularity of outdoor sports. Local governments are often responsible for the construction of specific outdoor sports programs and facilities, and the strength of their policy support is directly related to the quality, accessibility, and diversity of these facilities and activities. For example, local governments may decide to renovate or upgrade parks and green spaces with additional facilities such as long tracks, bike paths, and rock-climbing arenas to meet the growing demand for outdoor sports among residents.

At the same time, local governments also play a key role in promoting the formation and spread of an outdoor sports culture. By organizing regular outdoor sports activities and competitions, providing training and educational opportunities, and raising public awareness of the value of outdoor sports through the media and public information campaigns, local governments can effectively increase the willingness of the public to participate and the frequency of activities.

## ***3.2. Economic factors***

Economic factors have a direct and profound impact on the development of outdoor sports.

### ***3.2.1. Level of economic development and outdoor sports spending power***

There is a close relationship between the development of outdoor sports and economic conditions. The level of economic development directly affects the quality of life, consumption behavior and leisure choices of residents, which in turn affects the likelihood and frequency of their participation in outdoor sports.

Better economic conditions usually mean that residents have more leisure time and higher disposable incomes, both of which are key conditions for promoting outdoor sports participation. Residents may be more willing to invest in outdoor sports-related equipment and activities, such as purchasing specialized sports equipment, participating in outdoor adventure activities, or paying for professional instructors.

### ***3.2.2. Industrial structure and the development of the outdoor sports industry***

Industrial structure has an equally important impact on the development of the outdoor sports industry.

Economic development has promoted the growth of outdoor sports-related industries, providing a material foundation and service support for the popularization of outdoor sports. The optimization and upgrading of the industrial structure has led to the emergence of new businesses and the expansion of old ones, including the manufacture of outdoor equipment, the organization of outdoor activities, as well as related training and education services. The development of these businesses not only creates employment opportunities, but also improves the accessibility and diversity of outdoor sports and meets the needs of different consumers.

## ***3.3. Sociocultural factors***

Through sports education in the education system, publicity and promotional activities by the government and non-governmental organizations, positive media coverage, and sharing of outdoor sports experiences and knowledge through social media, outdoor sports can be disseminated and reach a wider audience, thus raising the overall awareness of outdoor sports in society and the willingness to participate.

## **4. Issues and challenges**

### ***4.1. Late start of the industry and imperfect industrial development***

The outdoor sports industry is still not sufficiently coordinated internally and still needs to be

upgraded as a whole. On the one hand, the industrial structure is unreasonable, the outdoor products manufacturing industry still occupies a dominant position, the competition and performance industry, fitness and leisure industry accounts for a relatively small proportion, and the development status is relatively weak. On the other hand, the scale of the industry is small, and the added value of the cultural industry and tourism industry is much higher than that of the sports industry. The level of industrial development is not high, the professional, green and intelligent development of the outdoor sports service industry is still in its infancy, and the service benefits of outdoor competitions and performances and other industries are not guaranteed.

The variety of product supply is not rich enough, the homogenization of outdoor sports competition products is serious, and the lack of effective combination with the local natural environment, customs and culture fails to effectively meet the personalized needs of consumers. In the rapid development of emerging technologies, outdoor sports products have not yet realized the effective combination of emerging technologies, and the speed of innovation is slow. Most of the high-precision outdoor sports equipment relies on imports, the domestic professional sports facilities independent research and development capabilities are insufficient, and there is a large gap in the market.

#### ***4.2. Lack of an external environment conducive to development and lack of opportunities for industry development***

##### ***4.2.1. Unsatisfactory development environment***

In terms of outdoor sports venues, the degree of openness of nature reserves is not high enough, and less than 1/3 of the nature reserves in China carry out outdoor adventure activities, and the projects lack characteristics and are seriously homogenized.

With regard to the provision of outdoor sports services, the service business has not formed full coverage, the quality of service facility construction, space design, and interactive experience varies, and safety and security measures are not in place, making it difficult to meet consumer demand and stimulate consumer desire.

##### ***4.2.2. Policy support not implemented***

Although eight departments, including the General Administration of Sport, issued the Outdoor Sports Industry Development Plan in 2022 and proposed to increase support for outdoor sports product innovation, however, the relevant tax incentives and land policies have not been effectively implemented, and incentives are not in place. The protection of property rights for sports product innovation is still lacking, and no special provisions for the protection of intellectual property rights for outdoor sports products have been set up, making it difficult to stimulate enthusiasm for innovation.

##### ***4.2.3. Inadequate supervision and inspection***

The outdoor sports guidance monitoring system is still not perfect, the service quality monitoring system is not accurate enough, the feedback mechanism is not sound enough, and there is no multi-party supervision system including the media, which makes the industry chaotic and affects the enthusiasm of public participation.

## **5. Conclusion**

With the rapid development of outdoor sports in China, the number of participants and market size have shown a significant growth trend. This trend reflects people's pursuit of a healthy life and their love for outdoor activities. At the same time, the diversification of outdoor sports types also provides people with more choices and meets the needs of different groups. At the same time, there are obvious geographical differences in the development of outdoor sports in various cities. This is mainly affected by a variety of factors such as policy support, economic development level, social culture and so on. Some developed cities have advantages in policy support and social cognition, and outdoor sports develop faster; while some less developed cities are limited by insufficient resources and lagging concepts, and their development is relatively lagging behind.

#### ***5.1. Three major factors, namely policy, economy and social culture, play a crucial role in promoting the development of outdoor sports***

Policy, economic and socio-cultural factors play a joint role in the development of outdoor sports. In

order to promote the healthy development of outdoor sports, we need to take these factors into account, formulate scientific and reasonable policies and measures, strengthen economic support and cultural guidance, and create a favorable environment and conditions for the development of outdoor sports.

### ***5.2. Policy guidance, public awareness enhancement, and safety management and regulation are the three core elements for the development of outdoor sports***

First, guidance and support at the policy level are crucial to the development of outdoor sports. Establishing a sound policy system for outdoor sports, clarifying the responsibilities and tasks of governments at all levels, and formulating specific policy measures are the basis for promoting the construction of outdoor sports facilities and the organization of activities. Increasing financial investment and improving infrastructure construction and its supporting services are key to enhancing the comfort and safety of outdoor sports venues. At the same time, encouraging the participation of enterprises and social organizations will help promote the rapid development of the outdoor sports industry and upgrade sports equipment and services.

Secondly, enhancing public awareness and participation in outdoor sports is an important way to promote its development. The establishment of volunteer teams and the enhancement of the social and interactive nature of outdoor sports can help improve participants' sense of belonging and identity. The establishment of a cross-sectoral collaboration mechanism, the integration of resources from various parties and the strengthening of publicity and education can effectively enhance the public's awareness of and interest in outdoor sports. Conducting experiential activities and rich and diversified events can help cultivate a healthy lifestyle and attract more people to participate in outdoor sports.

Finally, safety management and supervision is a part of the development of outdoor sports that cannot be ignored. Strengthening scientific research on outdoor sports, improving the safety management system and standardizing the safety operation procedures of sports are the basis for ensuring the personal safety of sports participants. At the same time, enhancing public safety awareness and strengthening self-protection skills training is an important guarantee to jointly create a safe outdoor sports environment.

To summarize, policy guidance, public awareness enhancement, and safety management and supervision are the three core elements for the development of outdoor sports. Through the comprehensive application of these countermeasures and suggestions, we can effectively promote the healthy development of outdoor sports and the in-depth implementation of the national fitness program.

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