

# Exploring the Development Path and Countermeasures of the Sports Rehabilitation and Wellness Industry under the Healthy China Strategy

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## Abstract

**Purpose** – This paper looks at how China's sports rehabilitation and wellness industry has grown under the Healthy China policy framework, paying close attention to both the new opportunities opening up and the structural problems that still hold the sector back.

**Design/Methodology/Approach** – The research draws on a combination of literature review, field investigation, and comparative case analysis to take stock of where the industry stands today, what is getting in the way of progress, and what realistic improvement routes might look like. Special attention goes to the uneven spread of development across regions, gaps in service provision, the shortage of trained professionals, and the absence of shared industry standards.

**Findings** – Against this backdrop, the paper puts forward a twin-track framework built around "digital empowerment" and "multi-stakeholder synergy." On the technology side, tools like big data, AI, and wearable sensors can help tailor health services to individual needs. On the institutional side, getting policy levers, regulatory standards, workforce training, and business model innovation to work in concert is what sustainable development actually requires.

**Research Implications** – letting market forces do their job in allocating resources, while also making sure government guidance is effective rather than nominal. Pushing the sports-medicine integrated service model further and building out a more coherent industrial ecosystem will put the sector in a better position to contribute meaningfully to the Healthy China goals and to the broader task of improving public health.

**Keywords:** Healthy China Strategy; Sports Rehabilitation and Wellness Industry; Sports-Medicine Integration; Development Path; Industrial Ecosystem

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## **I. Introduction**

China's economy has been changing fast, and so has its population—the country is aging, and aging quickly. These twin shifts have reshaped how people think about health. Demand for health-related services has grown more varied and more personal than it used to be. The release of the "Healthy China 2030" Planning Outline back in 2016 marked a turning point: health was no longer just a sector concern but a cross-cutting policy priority. Not long after, the General Office of the State Council put out guidance calling for tighter links between sports, healthcare, elderly care, and tourism. That push gave the sports rehabilitation and wellness sector a real boost. As part of the broader health service economy, this sector brings together physical activity, medical rehabilitation, and wellness maintenance under one roof—which is exactly what a population with increasingly complex health needs requires.

Growth in the sports rehabilitation and wellness industry has been hard to miss. Data from the General Administration of Sport show that the national sports industry hit 5.12 trillion yuan in total output in 2025, with fitness and leisure activities accounting for a growing share of that figure. At the same time, the National Health Commission reports that chronic disease sufferers now number over 500 million, and the population aged 60 and above is closing in on 130 million. Those numbers translate directly into demand for sports rehabilitation and health management services. But the industry has not had an easy ride. Cross-sector coordination is weak, professional service capacity is thin in many places, and development has been very uneven across regions (Mu Ruizhang & Luo Yongtai, 2025). Given all this, a serious look at development strategies and policy responses for the sports rehabilitation and wellness industry is overdue—both for the sake of the industry itself and for the millions of people whose quality of life depends on what it can deliver.

## **II. Theoretical Basis and Policy Evolution of the Sports Rehabilitation and Wellness Industry**

The sports rehabilitation and wellness industry did not emerge from nowhere. It grew out of two converging forces: ideas crossing over between academic disciplines, and a sustained run of government policy support. On the intellectual side, advances in sports medicine, rehabilitation science, health management, and the sociology of physical activity together built the case for the sector's core claim—that structured exercise can improve health and that rehabilitative care can sustain wellness. On the practical side, how well an industry develops has always had a lot to do with how coherent the surrounding policy environment is. The Healthy China strategy provided exactly that kind of top-down scaffolding, turning what had been scattered experiments in sports rehabilitation and wellness into something more like a nationally coordinated effort. Before getting into where the industry stands today and what is holding it back, it helps to understand the theoretical roots and the policy logic that got it here.

## **1. Institutional Guidance for Sports-Rehabilitation Integration under the "Healthy China" Strategy**

The "Healthy China 2030" Planning Outline is the master document for national health development. It sets an ambitious target: 16 trillion yuan in total health sector output by 2030, with the sports industry expected to chip in 5 trillion yuan of that. General Administration of Sport figures show that sports industry output climbed from 3.17 trillion yuan in 2010 to 5 trillion yuan in 2025—an average annual growth rate of around 10.3%. Over that same stretch, sports rehabilitation and wellness activities went from making up 68.7% of the health service sector to 72.7% (Shi Yan, 2025). That steady climb suggests the sector has been cementing its place as one of the main growth engines within the health economy. The "comprehensive health and holistic wellness" idea at the heart of the Healthy China strategy also helped by widening what physical activity is understood to be for—no longer just competitive sport and mass fitness, but health promotion and disease prevention too. That conceptual shift laid the groundwork for integrated sports rehabilitation and wellness development.

Looking at how policy has evolved, the Healthy China strategy's guidance on sports-rehabilitation integration has been both institution-building and incremental. The 2017 Outline for Building a Sporting Power was the first time "sports-medicine integration" showed up in national policy language. Two years later, the Healthy China Action Plan (2019–2030) spelled out more specific targets for national fitness and health promotion. In 2020, the Action Plan for Promoting High-Quality Development of the Health Industry put sports rehabilitation and wellness on the priority list. Then the "14th Five-Year Plan" for Healthy Aging in 2022 explicitly called for expanding sports rehabilitation and wellness services for older people. Taken together, these documents form a reasonably coherent governance framework—from broad strategic direction down to operational guidance, from central design to local implementation. National Health Commission data show that by the end of 2025, over 1,000 medical institutions across the country were offering exercise prescription services—six times the 2019 figure (Zhang Jiafeng & Deng Wanli, 2025). That kind of growth shows the industry has been responding to policy signals, and it also reflects a broader shift in how the sports sector sees its own purpose.

## **2. Reshaping Industrial Boundaries and Expanding Functions through Sports-Medicine Integration**

The sports-medicine integration concept has been actively redrawing the lines of the sports rehabilitation and wellness industry and pushing its scope outward. Under the old setup, sports meant competitive athletics and mass fitness; medicine meant diagnosis and clinical treatment. The two rarely talked to each other. The integrative approach has broken down those walls, giving rise to a hybrid sector organized around health promotion as its central purpose (Rao Ke, 2025). Within this framework, the industry's service offering has grown well beyond fitness instruction to cover health monitoring, disease risk reduction, and rehabilitative care—a much richer portfolio than what existed before.

In practice, the convergence of sports and medicine has kept pushing service delivery in new directions. The

exercise prescription is the main vehicle through which sports-medicine integration actually works. The logic is straightforward: based on physical examination results and individual health assessments, qualified medical practitioners design exercise programs aimed at improving fitness, managing chronic conditions, and supporting recovery. The Physical Activity Guidelines for Chinese People, issued by the National Health Commission in 2021, gave this process a stronger scientific foundation (Shi Yan, 2024). Alongside this, newer service models—smart wellness, precision wellness—have been picking up steam. By putting big data, AI, and related tools to work, these models can monitor physiological indicators in real time, assess risk levels, and deliver automated coaching feedback. The result is a push toward more specialized, personalized, and technology-driven services. These changes are not just good for service quality; they also open up new commercial opportunities and raise the sector's overall trajectory.

### **III. Current Landscape and Critical Constraints Facing China's Sports Rehabilitation and Wellness Industry**

With the theoretical foundations and policy history in place, the focus now shifts to what the industry actually looks like on the ground. Over the past several years, the Healthy China strategy has kept pushing the sector forward: markets have expanded, service categories have multiplied, and there has been some real progress in linking sports, healthcare, and elderly care resources. But the industry as a whole is still early-stage. Bright spots exist, but so do systemic gaps. Uneven regional development, lopsided service provision, personnel shortages, and weak standardization have all emerged as serious obstacles to moving from scale growth to quality improvement. Getting a clear picture of both what has worked and what has not is essential before any credible development pathway can be mapped out.

#### **1. Practical Progress in the Integration of Sports, Medical, and Elderly Care Resources**

China's sports rehabilitation and wellness industry has made measurable headway on resource integration, and a variety of development models have taken shape. One of the clearest examples is the medical-wellness complex approach seen at the Boao Lecheng International Medical Tourism Pilot Zone in Hainan Province, which brings together high-quality medical resources and wellness facilities on a single platform covering diagnostics, health management, and rehabilitative care (Chen Gang, 2024). Industry survey data show that by the end of 2023, more than 1,000 wellness bases had been set up nationwide, with over 65% of them incorporating sports rehabilitation functions. Major companies like Vanke and Taikang have also been building out integrated chains that connect insurance, healthcare, elderly care, and sports—providing working models for the broader sector to learn from.

Collaboration between medical institutions and sports organizations has also produced some encouraging results. Beijing Sport University's Institute of Sports Medicine, working with several large hospitals, set up a

sports rehabilitation center that uses advanced equipment and methods to deliver individualized rehabilitation programs for chronic disease patients—with measurable improvements in recovery outcomes (Hu Mi & Zhang Wei, 2024). In Shanghai, the Municipal Sports Bureau and the Municipal Health Commission jointly piloted a "sports-medicine integration" program, setting up more than 200 community-based exercise and health guidance stations across the city. These stations are staffed by professional health coaches who handle everything from exercise risk assessment to personalized exercise prescription. Initiatives like these have done a lot to advance resource integration and build up service delivery capacity in the sector.

## **2. Unbalanced Regional Development and Structural Imbalance in Service Supply**

Despite the sector's overall growth, regional imbalances remain a persistent and serious problem. In the more developed eastern coastal areas, stronger fiscal conditions and more active policy support have allowed the industry to take shape and begin clustering (Feng Wengang, 2023). 2025 data show that the Yangtze River Delta, Pearl River Delta, and Beijing-Tianjin-Hebei region together accounted for 67% of national industry output, while the central and western regions combined managed only 33%. The reasons are not hard to identify: different levels of economic development, varying degrees of policy support, and uneven infrastructure. The practical result is that quality sports rehabilitation and wellness resources are heavily concentrated in the developed east, leaving people in the vast central and western regions with far less access to decent services.

The structural imbalance in service supply is another issue that deserves serious attention. Right now, sports rehabilitation and wellness services in China are mostly aimed at higher-end consumers, while middle-aged and elderly people and those with chronic conditions are being underserved (China Sport Science Society, Sport Sociology Branch, 2023). A 2023 survey by the China Health Management Association found just over 5,000 institutions with professional sports rehabilitation credentials nationwide—nowhere near enough to meet growing demand. Service standardization is also weak: there is no comprehensive set of sector-wide norms and evaluation criteria, which means service quality varies enormously from one provider to the next. The personnel shortage compounds all of this. The most acute gap is in interdisciplinary practitioners who are genuinely competent in sports medicine, rehabilitation science, and nutritional science—people who can handle the full complexity of what clients actually need. That shortage is a real bottleneck.

## **IV. Pathway Construction for High-Quality Development of the Sports Rehabilitation and Wellness Industry**

Now that the main constraints facing China's sports rehabilitation and wellness industry have been laid out, the question becomes: what does a realistic path toward high-quality development actually look like? High-quality development is not just about getting bigger. It means improving service capability, delivery efficiency,

user experience, and the institutional environment all at once. The current wave of technological change is reshaping the logic of health service provision in fundamental ways—digitalization, intelligent systems, and platform-based business models are creating new possibilities for getting around resource constraints, narrowing regional gaps, and making services more precise. But technology alone cannot fix the industry's deep structural problems. It has to be paired with progress on institutional design, workforce development, and business model innovation. With that in mind, this section approaches the practical pathways toward high-quality development through two lenses: digital empowerment and multi-stakeholder collaborative synergy.

### **1. Innovation of Personalized Health Service Models Enabled by Digital Empowerment**

The rapid advance of digital technology has given the sports rehabilitation and wellness industry a real technical foundation for transformation and upgrading. In recent years, as China's digital health sector has kept expanding, the sports rehabilitation and wellness field has been putting emerging technologies—AI, big data, the Internet of Things, cloud computing—to work in building user-centered smart health service systems. This is what makes personalized and precision-oriented service delivery possible in practice.

At the front end, the spread of smart wearable devices has made real-time health data collection genuinely practical. Through smart wristbands, body composition analyzers, and sports watches, users can now get multi-dimensional physiological readings—heart rate, gait, sleep quality, energy expenditure—on an ongoing basis. Health monitoring has shifted from looking backward to looking forward. In the middle layer, personalized exercise prescription systems built on big data and machine learning can pull together information about a user's demographics, exercise history, physical condition, and lifestyle to generate tailored exercise plans and keep refining them over time (Zou Qinghai, Dong Yu, Peng Wanjun, et al., 2022). At the back end, remote health monitoring platforms use cloud infrastructure to deliver health services across geographic boundaries—something that matters especially for elderly people and those managing chronic conditions.

Smart health management platforms have pushed this transformation further. These platforms bring together hospitals, fitness centers, wellness facilities, and other service providers into a single digital service chain covering the full continuum from "prevention through treatment to rehabilitation and wellness maintenance" (Xiang Zhaoshan, Feng Minghui, & Li Zhongwen, 2023). Virtual reality is being applied to sports-based rehabilitation training, making sessions more engaging and improving patient compliance. Blockchain is helping protect personal health data while allowing trusted sharing across institutions. And the widespread use of mobile health apps has made it possible for users to get professional exercise guidance, nutritional advice, and wellness consultations whenever and wherever they need them—cutting down the barriers to quality health services considerably.

## **2. Multi-Stakeholder Collaborative Mechanisms: Integration of Policy, Standards, Talent, and Business Models**

Getting the sports rehabilitation and wellness industry to genuinely high-quality development requires coordinated movement on multiple fronts—government support, regulatory standards, human resource development, and business model innovation all need to move together. On the policy side, the state has put out a series of foundational documents—the "Healthy China 2030" Planning Outline, the Opinions on Promoting National Fitness and Sports Consumption—that provide the top-level institutional backing for sector growth. By 2025, 21 provincial-level jurisdictions had rolled out dedicated support policies for sports rehabilitation and wellness, with total public financial commitments reaching around 15 billion yuan. Tax breaks, land-use incentives, and direct financial support have lowered the barriers to entry and pulled in significant private investment. On standardization, work is intensifying to build out a comprehensive standards framework covering service quality, safety, personnel credentials, and facility requirements—the basic conditions for orderly sector development.

Workforce development and business model innovation have been providing their own momentum. More than 150 universities now offer programs in sports rehabilitation, health management, and related fields, producing around 28,000 graduates a year—but the gap between supply and demand is still wide. Industry-education integration models have been gaining ground in response: university-enterprise partnerships, jointly run internship facilities, and "dual-qualification" instructors who combine academic credentials with real industry experience are all being used to improve the quality of graduates (Wang Longfei & Yin Xiaocui, 2020). On the business model side, new service formats have been emerging—membership-based personalized planning, combined basic-plus-commercial insurance coverage, integrated online-to-offline delivery—that diversify both what is on offer and how revenue is generated. Notably, as medical insurance payment reforms move forward, some pilot areas have started including sports rehabilitation services in reimbursement schemes. That is an important opening for sustainable sector growth (Li Fangyuan, 2024).

Digital empowerment and multi-stakeholder synergy are not two separate tracks. They depend on each other. Digital tools provide the means for delivering personalized services with real precision; institutional alignment, qualified people, and business model innovation create the conditions under which those tools can actually be scaled. Only when both are working together can the sports rehabilitation and wellness industry make the shift from quantitative growth to genuine qualitative improvement.

## **V. Conclusion**

This paper has worked through the developmental logic, practical constraints, and high-quality development pathways of China's sports rehabilitation and wellness industry against the backdrop of the Healthy China strategy. The analysis suggests that the sector's rise can be traced to the interplay between theoretical innovation



and institutional supply. The "comprehensive health" idea at the core of the Healthy China strategy has set the directional course at the normative level, while the sports-medicine integration concept has provided the operational methodology for cross-sector convergence. Together, these two forces have acted as a kind of dual engine for the industry.

On the empirical side, China's sports rehabilitation and wellness sector is at an early stage where growth momentum and structural growing pains coexist. The positives are real: the market is expanding, cross-sector integration of sports, healthcare, and elderly care resources is beginning to show results, and the sports industry reached 5.12 trillion yuan in 2025 with the sports rehabilitation and wellness share trending upward. But the problems are equally real. Regional disparities are stark—the three main eastern clusters account for 67% of national output. Service provision is structurally lopsided, with middle-aged and elderly people and chronic disease sufferers conspicuously underserved. Personnel shortages persist, with only 28,000 graduates a year falling well short of what is needed. And the absence of a solid industry standards framework remains a drag on quality. These are the main bottlenecks blocking the transition from scale-driven to quality-driven growth.

To address these constraints, this paper proposes a "digital empowerment + multi-stakeholder synergy" twin-track pathway. On the digital side, a layered architecture—front-end data collection, midstream intelligent analytics, back-end service delivery—can drive innovation in personalized exercise prescription, remote health monitoring, and smart health management, using technology to narrow regional gaps and sharpen service precision. On the multi-stakeholder side, policy support, regulatory standards, workforce development, and business model innovation need to come together as an integrated institutional force. A coordinated package—targeted support policies, a comprehensive standards framework, industry-education training models, and health insurance reimbursement reforms—can provide the systemic institutional backing that high-quality development requires. These two dimensions reinforce each other: digital tools supply the precision instruments for personalized care, while multi-stakeholder synergy creates the environment in which those tools can be deployed at scale. Working together, they map out a practical path for the industry's transition toward high-quality development.

Going forward, the sports rehabilitation and wellness industry needs to stay aligned with the Healthy China agenda and keep innovation at the center of its growth strategy. The priority should be accelerating the adoption and deepening of the sports-medicine integration service model, building out a more coherent industrial ecosystem, and raising both standardization and specialization. At the same time, market forces need room to work in resource allocation, and government guidance needs to be both stronger and more targeted. Coordinated action across policy support, standard-setting, workforce development, and business model innovation—bringing together diverse stakeholders and pooling their strengths—is what will actually move the sector toward sound and sustainable development.

As health awareness keeps rising and household consumption patterns keep shifting, the sports rehabilitation and wellness industry is set to play a bigger role in advancing the Healthy China agenda, improving population health, and generating new economic growth. As one of the main growth poles in the health service economy, how well it develops matters not just for its own commercial performance but, more fundamentally, for



how people actually feel about their lives. That said, some important questions remain open: how to make sure policy implementation reaches the actual service delivery points, how to build business models that are financially sustainable over time, and how to promote equitable access to services across urban and rural areas—these are all issues that deserve continued research attention.

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